

Wine  
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Wine

**Western Australia**  
**Export Report**  
**MAT December 2019**

# 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 packaged) 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 packaged 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’

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# Estimate of overall state by state exports

	MAT December 2019		Change %	
	Volume (million L)	Value (million AUD)	Volume	Value
SA	370	\$1,888	-10%	7%
NSW	217	\$508	-13%	-5%
VIC	147	\$437	-17%	-2%
WA	8.3	\$66	-13%	0%
TAS	1.2	\$9.0	-4%	3%
QLD	0.2	\$1.3	-22%	-23%
ACT	0.0	\$0.3	11%	4%
<b>Total</b>	<b>744</b>	<b>\$2,909</b>	<b>-12%</b>	<b>3%</b>

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	2,587	4%	\$32,944	9%	\$12.74	5%
Western Australia	1,310	-13%	\$8,892	-11%	\$6.79	2%
Frankland River	268	-39%	\$2,601	-35%	\$9.72	5%
Great Southern	259	17%	\$2,738	11%	\$10.58	-5%
Geographe	129	14%	\$930	0%	\$7.22	-12%
Mount Barker	77	-26%	\$859	1%	\$11.18	35%
South West Australia	72	-55%	\$530	-43%	\$7.38	25%
Blackwood Valley	41	322%	\$428	375%	\$10.46	13%
Pemberton	40	-26%	\$435	-15%	\$10.87	14%
Perth Hills	39	51%	\$559	94%	\$14.16	29%
Manjimup	35	-44%	\$334	-25%	\$9.66	34%
Frankland	30	83%	\$301	61%	\$10.02	-12%
Swan Valley	26	10%	\$241	14%	\$9.20	3%
Greater Perth	9	108%	\$49	54%	\$5.36	-26%
Denmark	6	-18%	\$95	-41%	\$15.17	-28%
Porongurup	3	-20%	\$45	-17%	\$16.41	4%
Swan District	2	-44%	\$22	-43%	\$10.35	3%
Albany	0		\$5		\$12.37	na
Peel	0	-81%	\$3	43%	\$22.22	658%

# GI claims over time

	Volume		Value		Average Value AUD per litre	
	'000 litres	Change	'000 AUD	Change	litre	Change
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	5,241	7%	\$51,424	5%	\$9.81	-2%
MAT December 2019	4,933	-6%	\$52,011	1%	\$10.54	7%

# GI claims by country and year

	MAT December									
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Volume ('000 litres)										
Canada	341	487	347	341	255	190	227	179	177	141
China, Pr	870	1,503	1,703	1,475	1,322	1,209	1,613	2,091	2,354	2,302
Denmark	79	81	102	72	96	84	76	49	56	29
Finland	10	99	99	80	57	121	114	150	117	106
France	52	78	69	87	58	48	38	49	9	31
Hong Kong	334	537	705	584	413	284	304	273	310	188
Japan	135	129	110	111	85	81	73	62	71	104
Malaysia	45	85	67	67	64	73	44	60	60	55
New Zealand	59	56	71	52	111	81	100	101	110	81
Ship	62	84	79	98	31	97	123	101	88	77
Singapore	321	288	265	239	238	302	284	281	242	310
Thailand	70	73	88	71	60	64	108	92	120	110
United Arab Emirates	95	67	141	182	97	72	134	85	45	40
United Kingdom	1,261	1,469	934	694	710	788	729	586	605	452
United States Of America	605	500	532	380	494	371	490	414	423	505
Value ('000 AUD)										
Canada	3,053	4,016	3,072	2,805	2,288	2,116	2,589	2,164	2,231	1,848
China, Pr	6,312	12,533	13,213	11,038	9,210	9,726	13,157	17,839	20,096	21,174
Denmark	589	659	777	504	717	724	687	509	569	307
Finland	61	606	609	572	425	911	815	1,055	940	919
France	709	778	677	954	694	485	448	491	134	418
Hong Kong	2,685	3,901	4,190	3,269	2,763	2,592	3,038	3,172	3,530	2,452
Japan	1,522	1,540	1,782	1,152	1,077	998	905	846	958	1,331
Malaysia	504	776	789	687	694	777	523	706	658	693
New Zealand	587	499	657	494	883	709	843	918	968	756
Ship	714	989	846	913	319	782	1,064	923	902	684
Singapore	3,497	3,336	3,262	3,106	3,000	3,891	3,710	3,903	3,441	4,589
Thailand	567	569	645	636	451	522	1,001	812	1,214	1,097
United Arab Emirates	849	846	1,341	1,718	1,114	799	1,130	1,233	606	614
United Kingdom	8,528	8,791	6,408	5,223	5,901	6,755	6,598	5,973	5,550	4,658
United States Of America	4,327	3,273	3,709	3,480	4,928	4,176	5,764	4,978	4,801	5,989

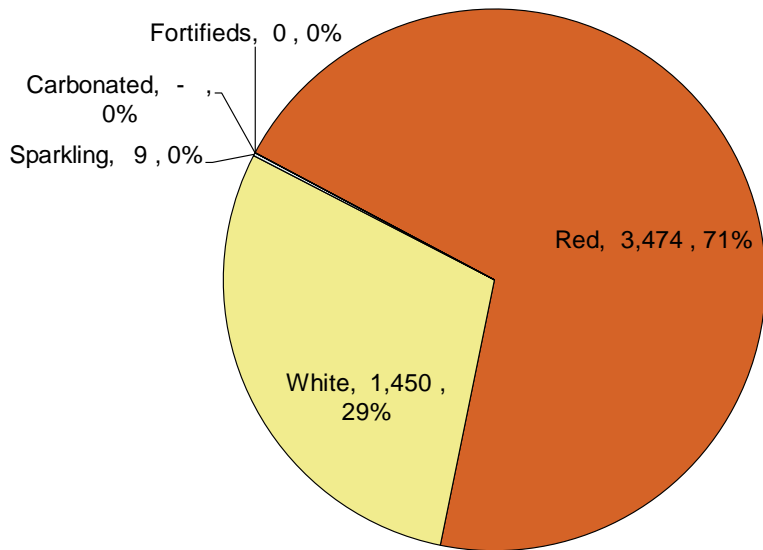
# Packaged exports by price point and destination

	\$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)	(%)
Hong Kong	0.0	-65%	2.3	-25%	34.2	-29%	52.1	-61%	80.9	-19%	18.2	-25%	187.8	-39%
Canada	0.1	-52%	2.0	-6%	4.2	-67%	11.3	-21%	114.9	-17%	8.4	-19%	140.9	-21%
China, Pr	5.6	-81%	489.9	6%	700.7	-16%	336.9	2%	642.1	9%	126.3	11%	2,301.6	-2%
Japan	-	na	8.1	na	6.0	-45%	28.6	137%	50.6	29%	10.5	26%	103.7	47%
Netherlands	-	na	20.9	na	19.7	30%	11.9	77%	2.5	-65%	0.1	-91%	55.2	82%
New Zealand	-	na	2.7	-74%	36.9	-34%	22.7	46%	15.4	-30%	3.4	-39%	81.1	-26%
Singapore	0.9	na	1.3	-68%	14.3	-6%	26.1	-10%	215.1	31%	51.8	72%	309.5	28%
United Kingdom	0.1	na	15.5	-89%	149.6	-20%	193.6	27%	63.3	-36%	30.3	3%	452.4	-25%
United States Of America	-	-100%	6.1	-6%	62.0	37%	275.4	46%	113.2	-27%	48.4	79%	505.1	19%
Malaysia	-	na	0.3	-95%	13.4	6%	17.1	-10%	17.4	1%	6.8	26%	55.0	-8%
Finland	-	na	-	na	-	-100%	101.5	2%	4.7	116%	0.1	na	106.2	-9%
Indonesia	-	na	-	na	5.3	2121%	12.3	72%	20.1	17%	6.8	-25%	44.4	32%
Ship	0.0	na	21.5	971%	16.7	-39%	5.0	-45%	32.6	-31%	1.4	-21%	77.2	-12%
Thailand	-	na	4.7	88%	6.8	-31%	61.1	-15%	34.2	6%	3.0	-30%	109.8	-9%
Vietnam	-	na	2.0	707%	23.3	387%	44.1	496%	43.5	828%	1.8	37%	114.7	522%
Other	0.6	15%	1.8	-2%	35.2	-81%	104.3	-17%	118.2	-12%	28.1	-9%	288.2	-40%
<b>Total</b>	<b>7.5</b>	<b>-75%</b>	<b>579.3</b>	<b>-9%</b>	<b>1,128.3</b>	<b>-24%</b>	<b>1,303.9</b>	<b>7%</b>	<b>1,568.6</b>	<b>0%</b>	<b>345.4</b>	<b>14%</b>	<b>4,933.0</b>	<b>-6%</b>

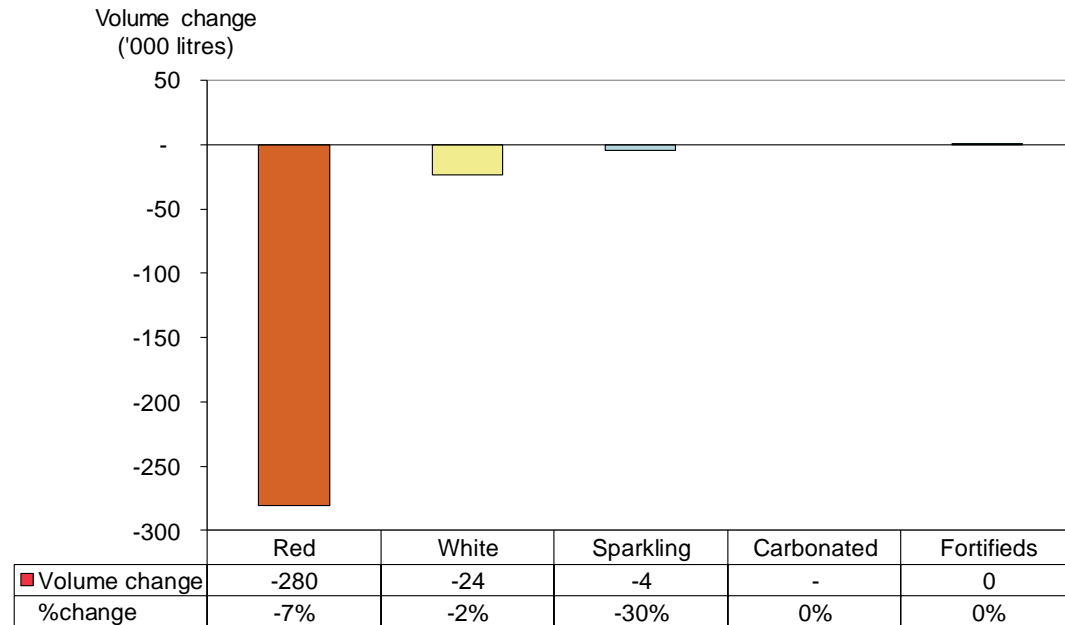


# Packaged exports by colour/wine style

Volume ('000 litres)

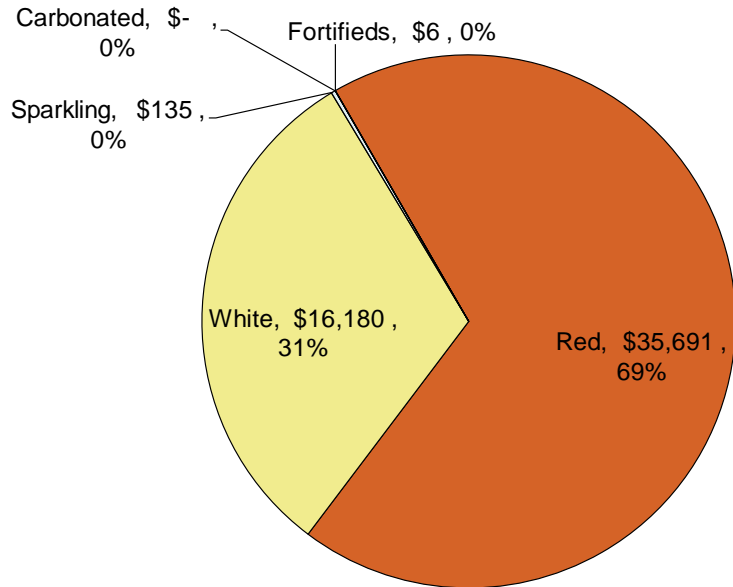


Change in volume

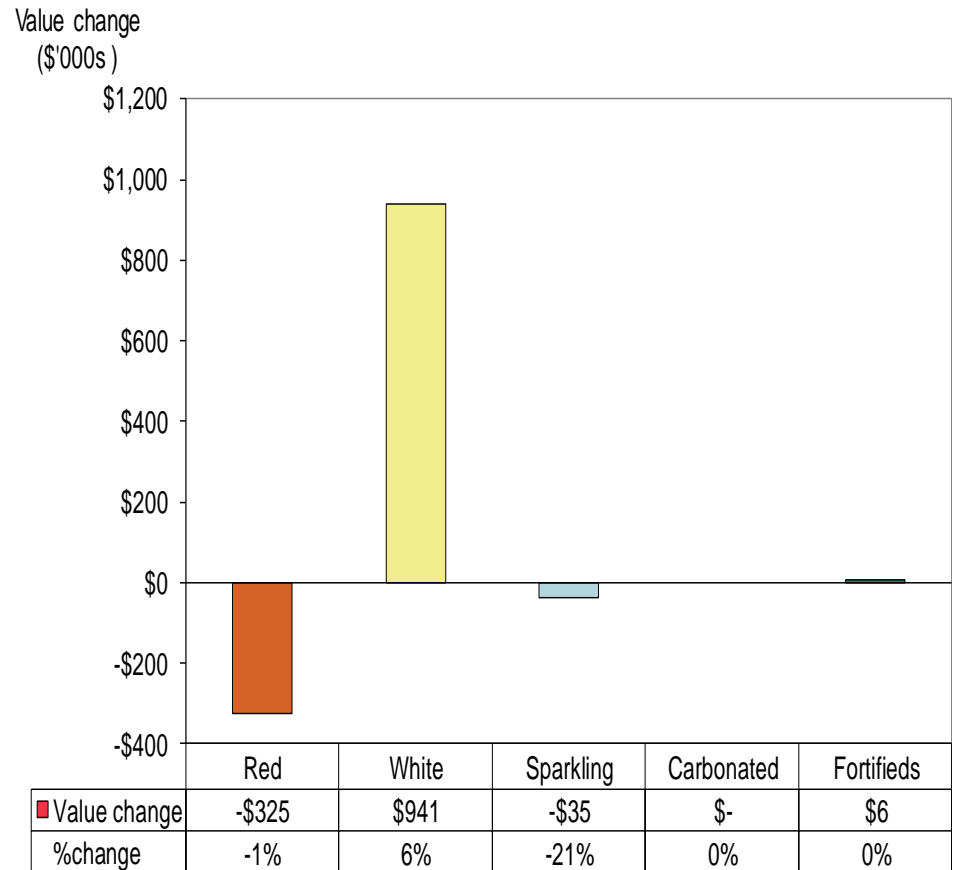


# Packaged exports by colour/wine style

Value ('000 AUD)

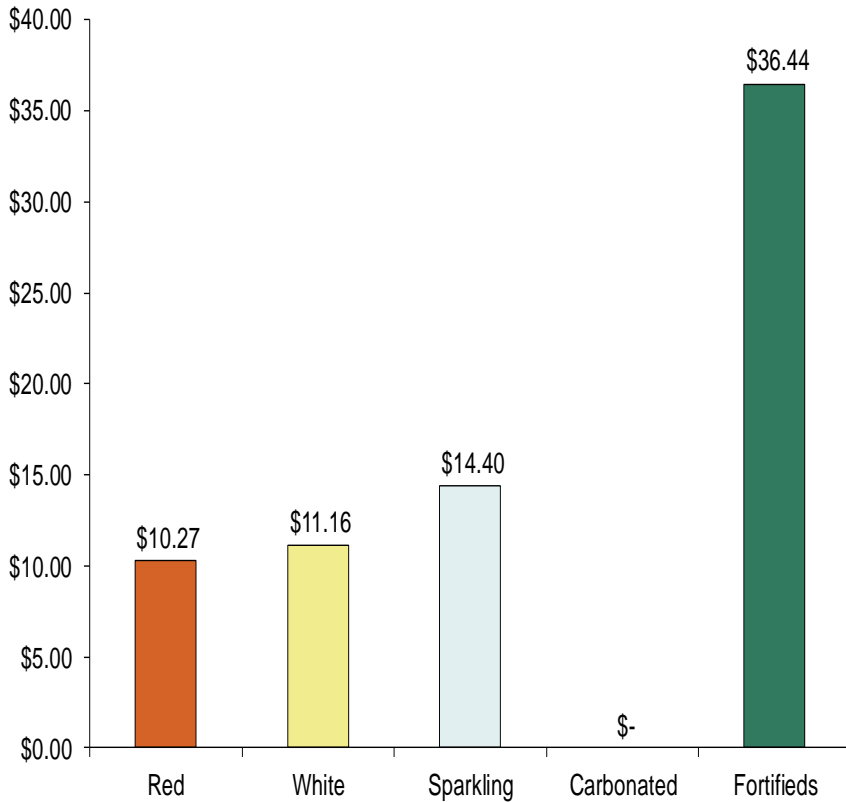


Change in value

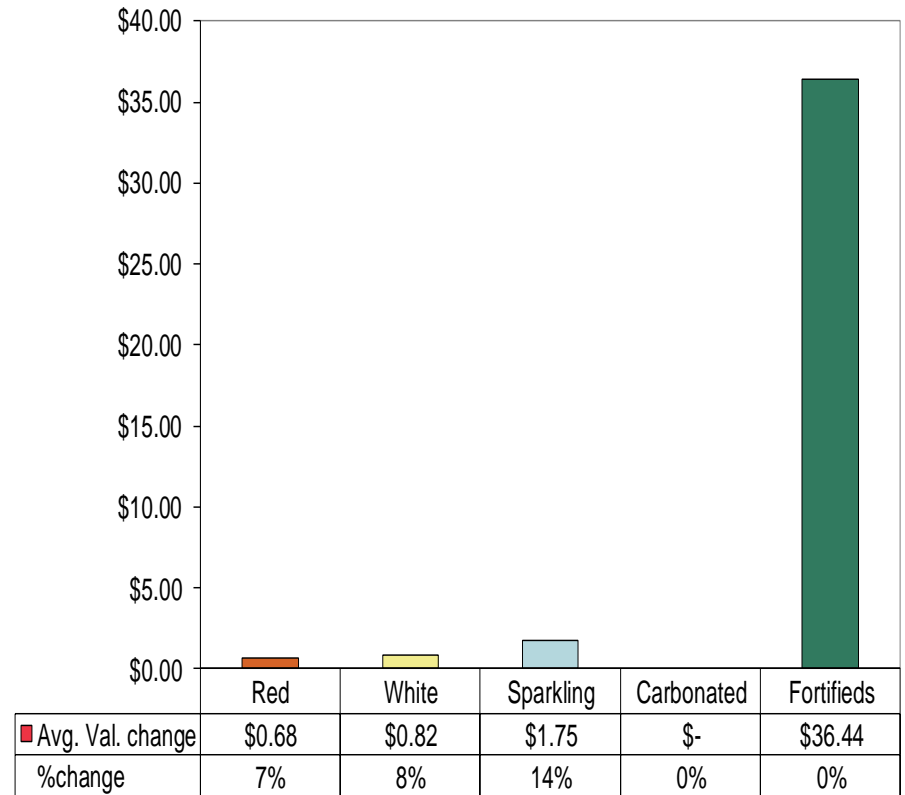


# Packaged exports by colour/wine style

Average value (AUD per litre)

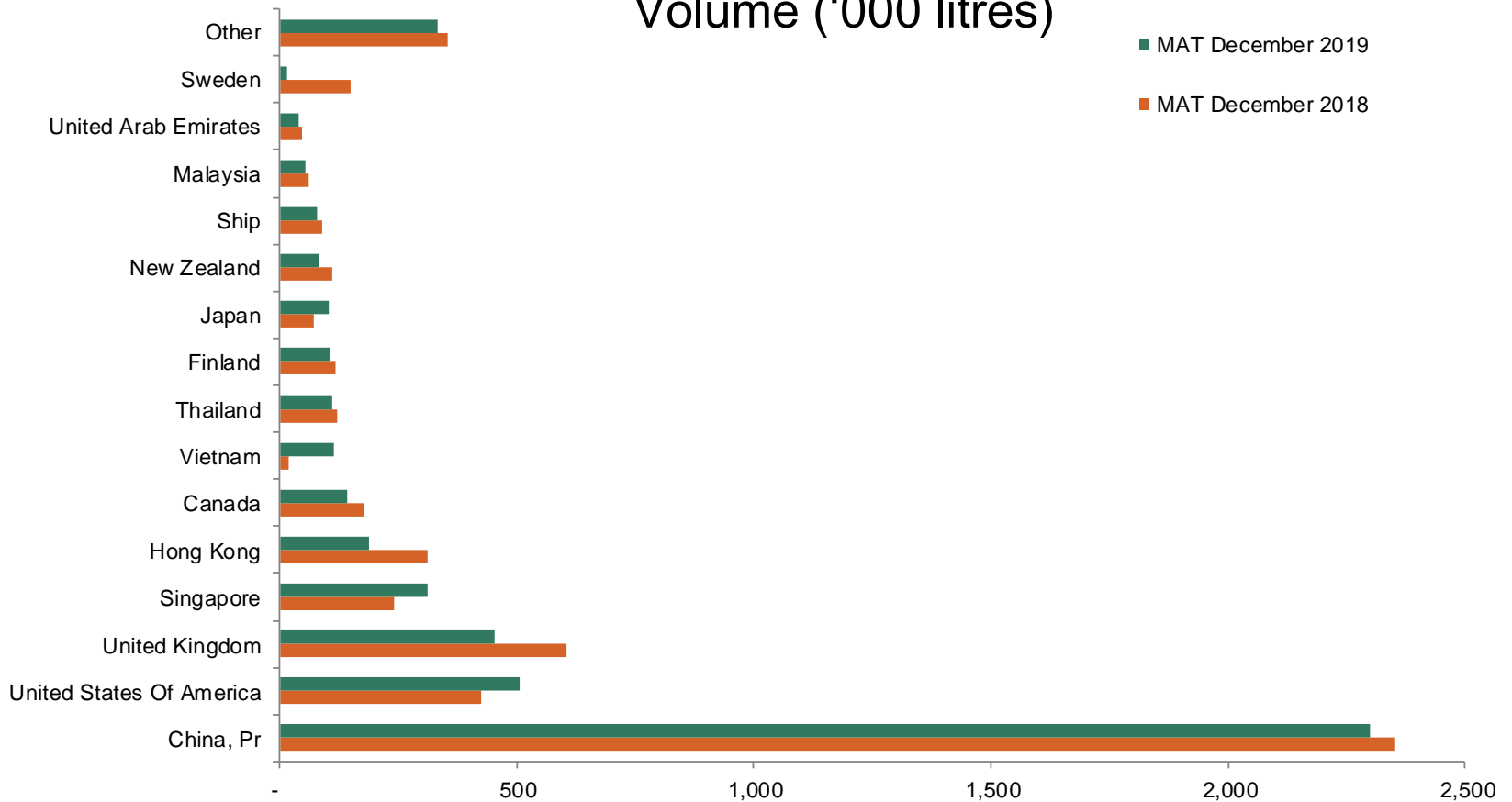


Change in average value



# Packaged exports to top 15 destinations

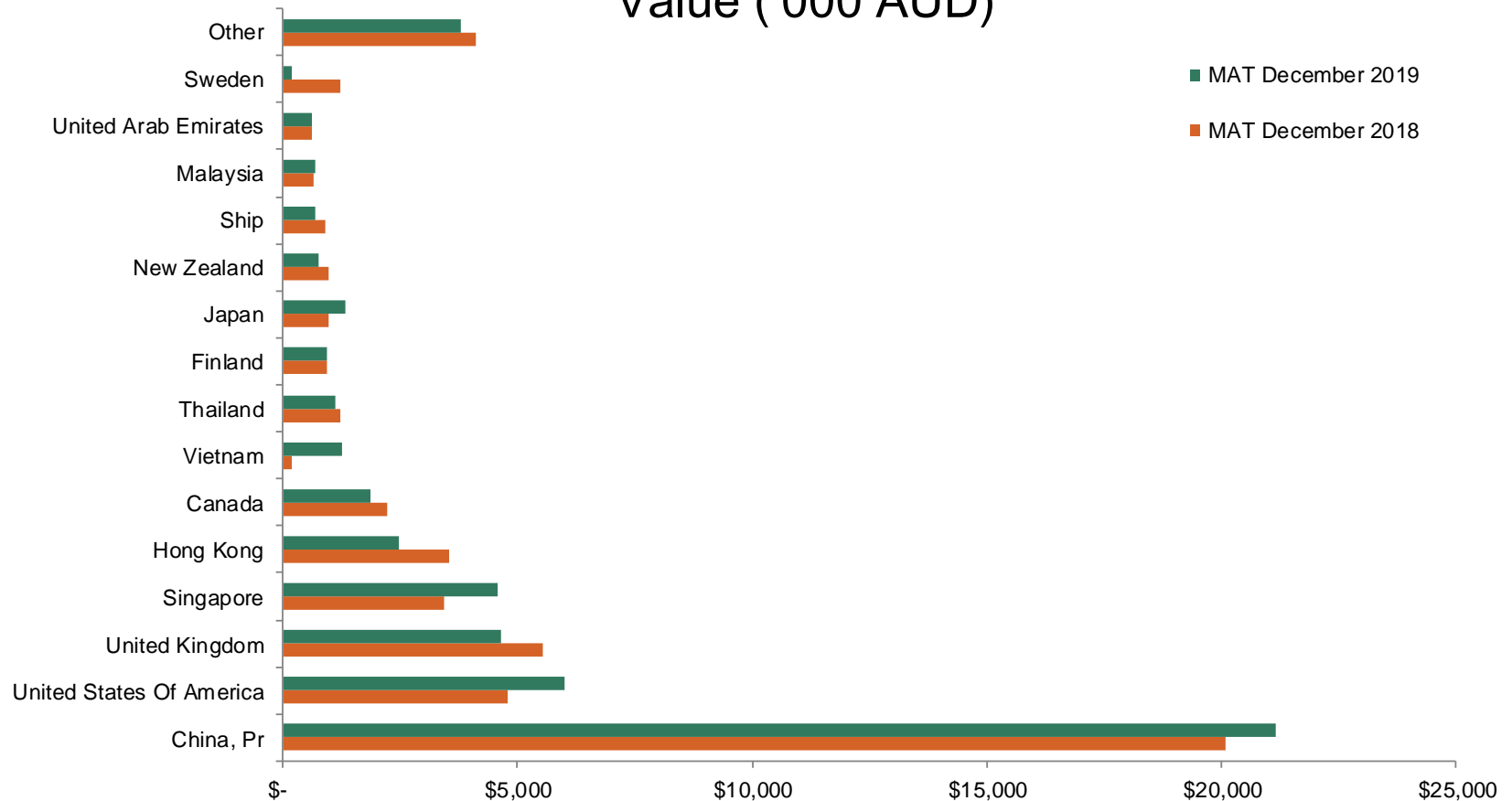
Volume ('000 litres)



	China, Pr	United States Of America	United Kingdom	Singapore	Hong Kong	Canada	Vietnam	Thailand	Finland	Japan	New Zealand	Ship	Malaysia	United Arab Emirates	Sweden	Other
■ MAT December 2019	2,302	505	452	310	188	141	115	110	106	104	81	77	55	40	15	333
■ MAT December 2018	2,354	423	605	242	310	177	18	120	117	71	110	88	60	45	149	353

# Packaged exports by top 15 destinations

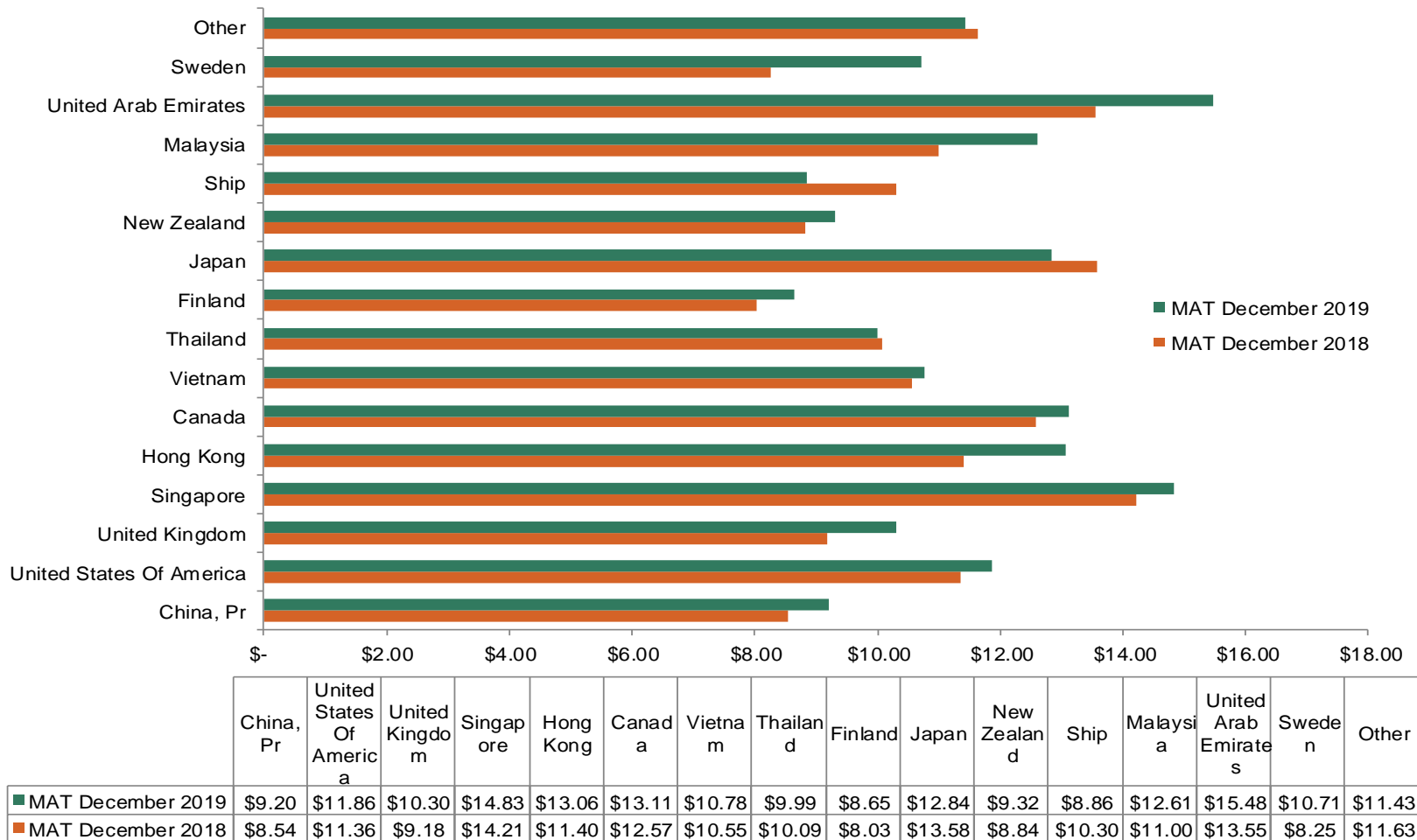
Value ('000 AUD)



	China, Pr	United States Of America	United Kingdom	Singapore	Hong Kong	Canada	Vietnam	Thailand	Finland	Japan	New Zealand	Ship	Malaysia	United Arab Emirates	Sweden	Other
■ MAT December 2019	\$21,17	\$5,989	\$4,658	\$4,589	\$2,452	\$1,848	\$1,236	\$1,097	\$919	\$1,331	\$756	\$684	\$693	\$614	\$165	\$3,804
■ MAT December 2018	\$20,09	\$4,801	\$5,550	\$3,441	\$3,530	\$2,231	\$195	\$1,214	\$940	\$958	\$968	\$902	\$658	\$606	\$1,226	\$4,106

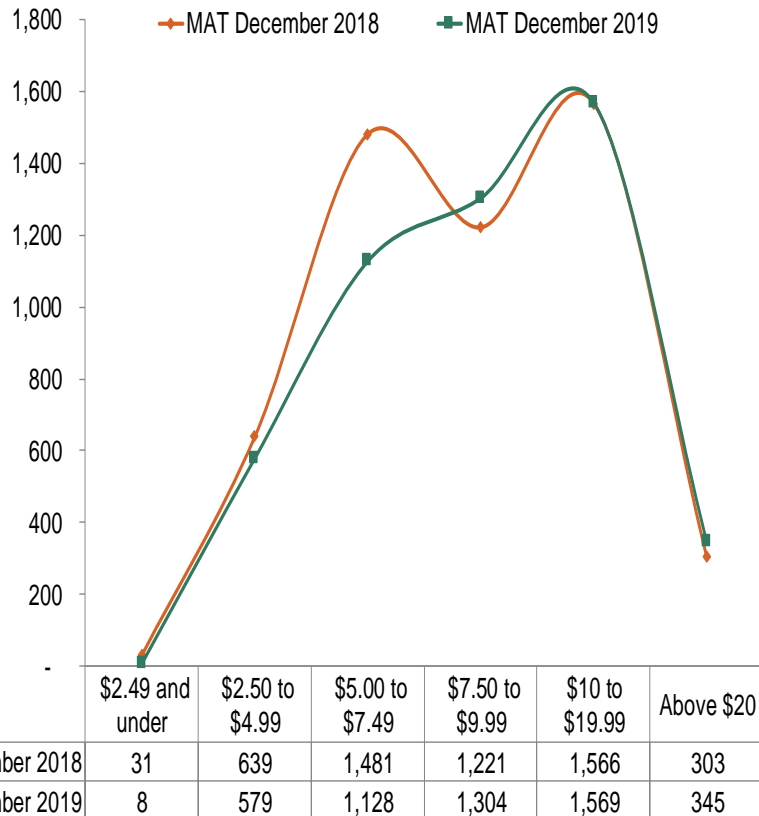
# Packaged exports by top 15 destinations

Average value (AUD/litre FOB)

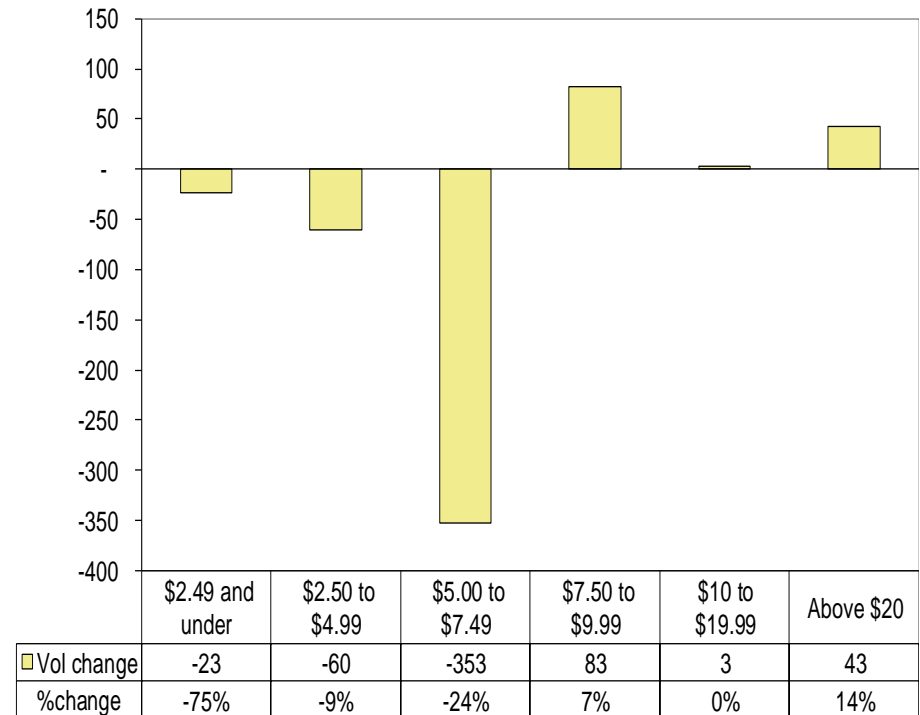


# Packaged exports by price point

## Volume ('000 litres)

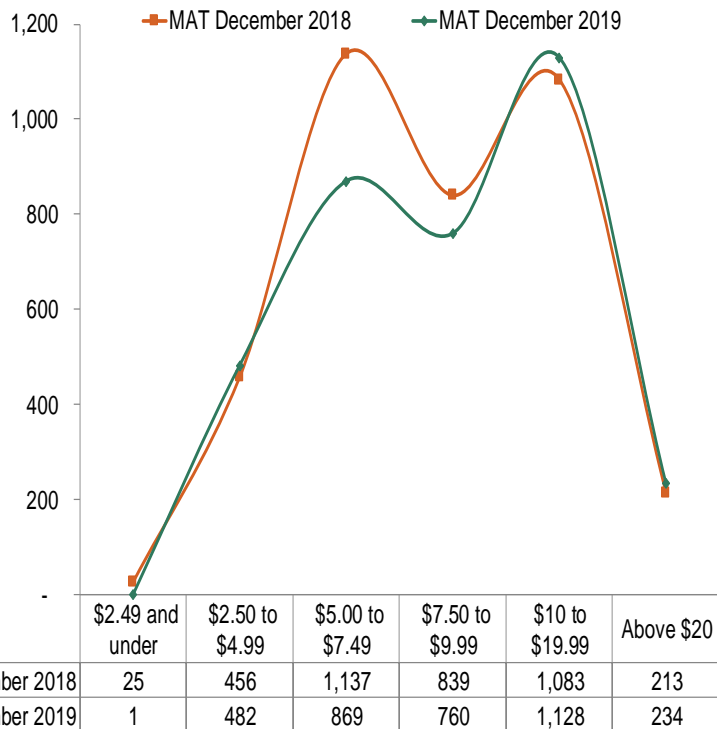


## Change in volume

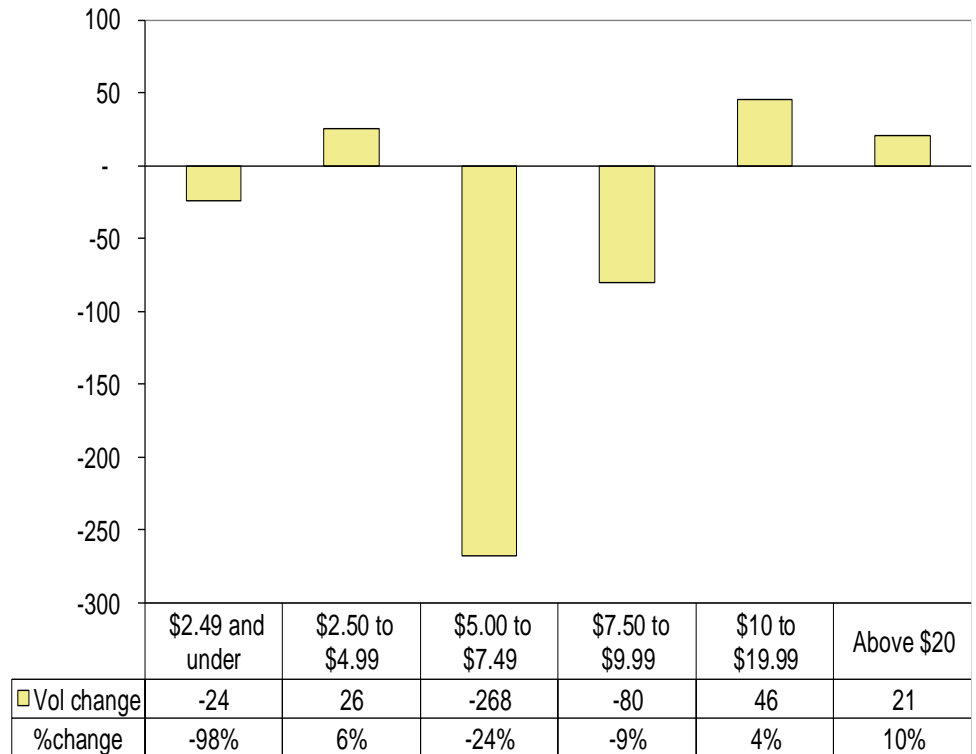


# Packaged red wine exports by price point

Volume ('000 litres)



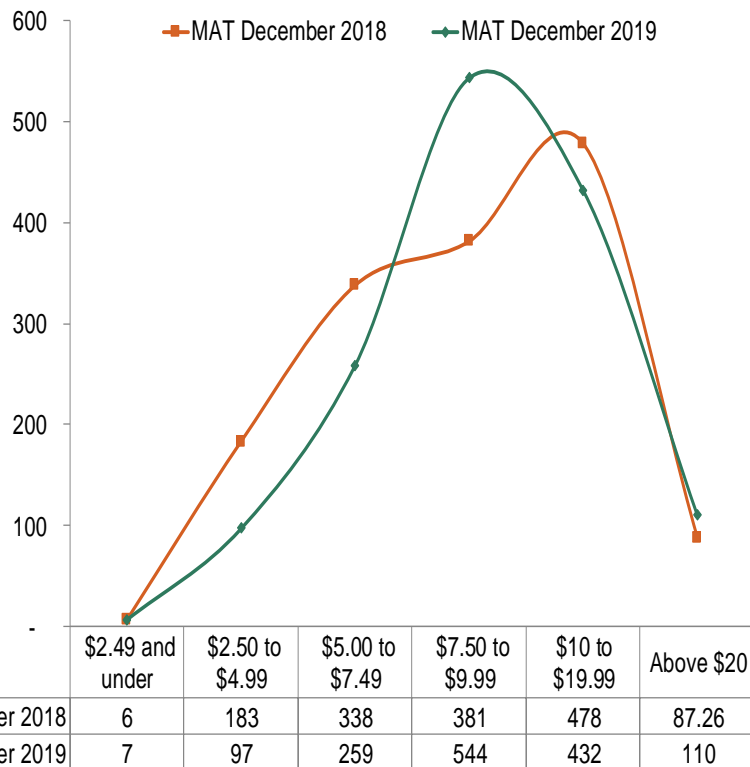
Change in volume



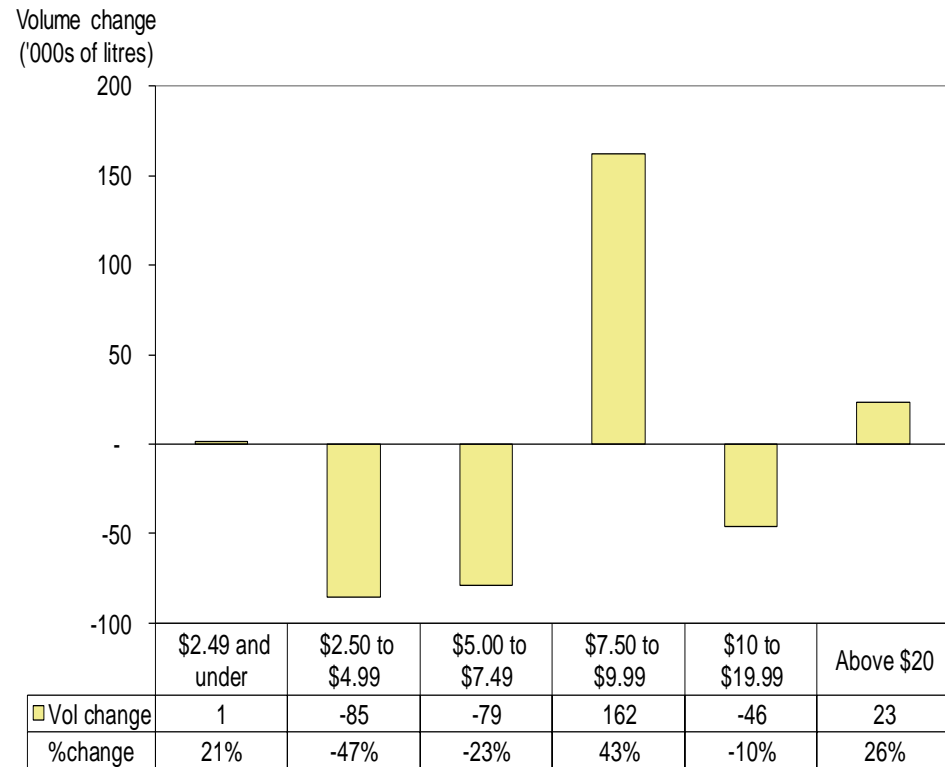


# Packaged white wine exports by price point

## Volume ('000 litres)



## Change in volume

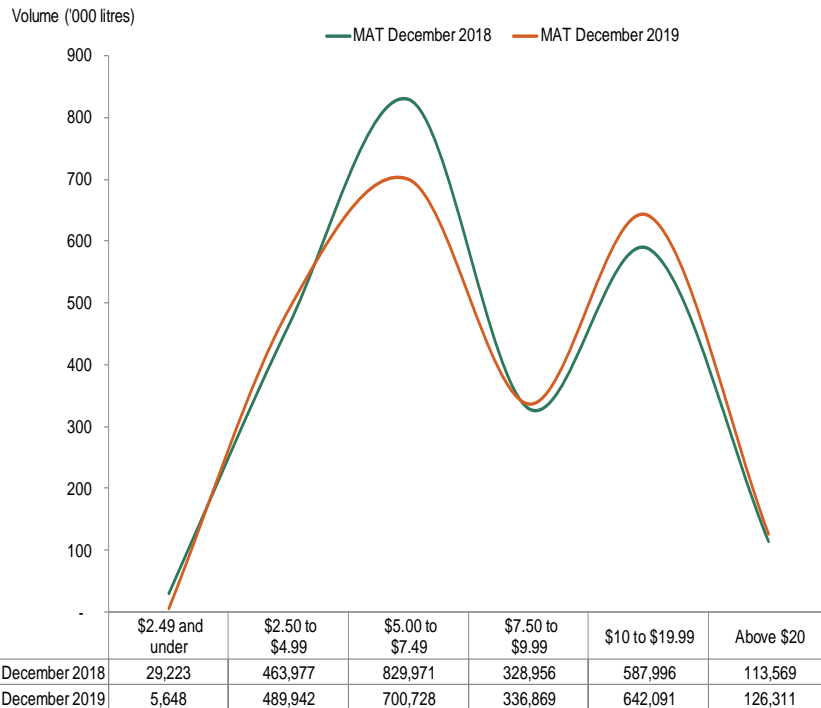


# Packaged wine exports to China, Pr

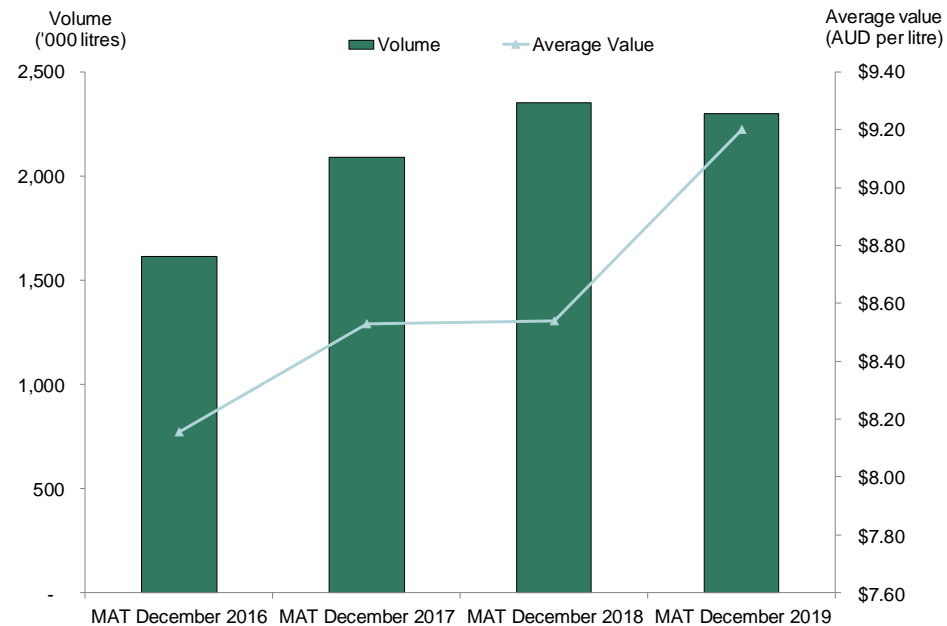
## Overview

### Total wine by price point

		MAT December 2018	MAT December 2019	Change
Red wine	Volume (litres)	2,166,238	2,138,391	-1%
	Value (AUD)	\$18,238,248	\$19,443,056	7%
	Average value	\$8.42	\$9.09	8%
White wine	Volume (litres)	178,369	159,135	-11%
	Value (AUD)	\$1,755,090	\$1,671,785	-5%
	Average value	\$9.84	\$10.51	7%
Total wine	Volume (litres)	2,353,692	2,301,588	-2%
	Value (AUD)	20,096,426	21,174,166	5%
	Average value	\$8.54	\$9.20	8%



### Total volume and average value

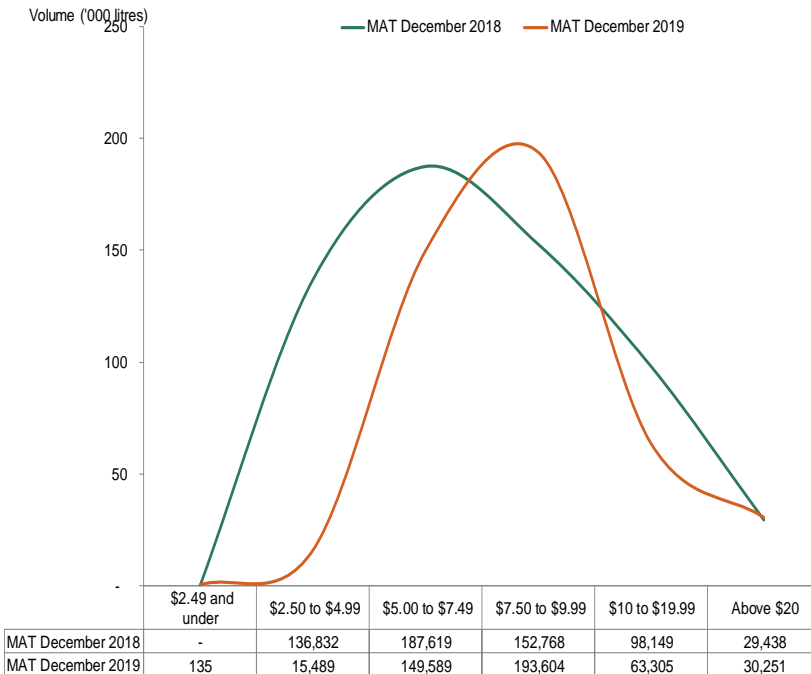


# Packaged wine exports to United Kingdom

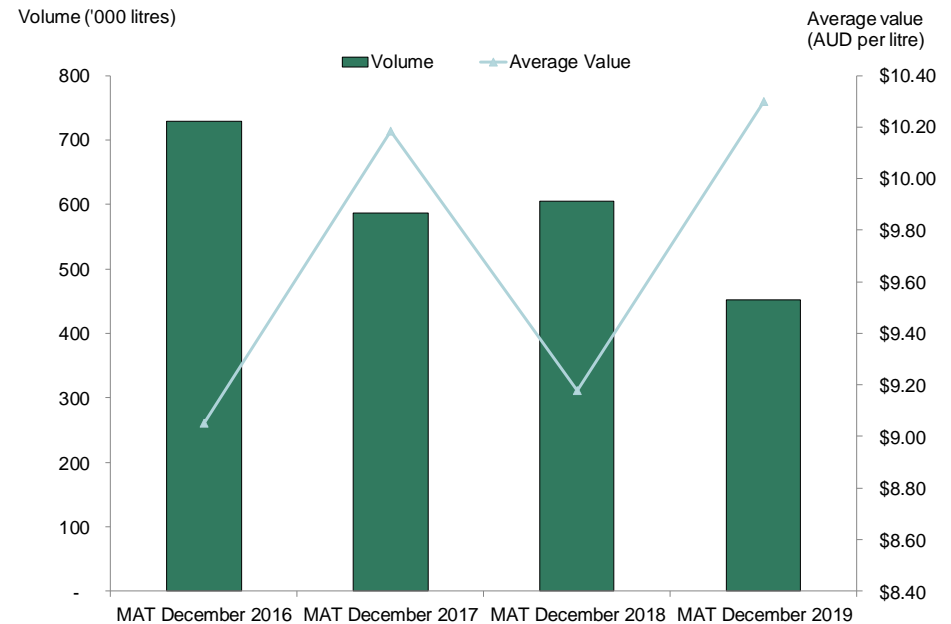
## Overview

		MAT December 2018	MAT December 2019	Change
Red wine	Volume (litres)	270,070	233,124	-14%
	Value (AUD)	\$2,816,117	\$2,455,399	-13%
	Average value	\$10.43	\$10.53	1%
White wine	Volume (litres)	334,555	218,862	-35%
	Value (AUD)	\$2,729,927	\$2,197,274	-20%
	Average value	\$8.16	\$10.04	23%
Total wine	Volume (litres)	604,805	452,373	-25%
	Value (AUD)	\$5,549,918	\$4,658,290	-16%
	Average value	\$9.18	\$10.30	12%

## Total wine by price point



## Total volume and average value

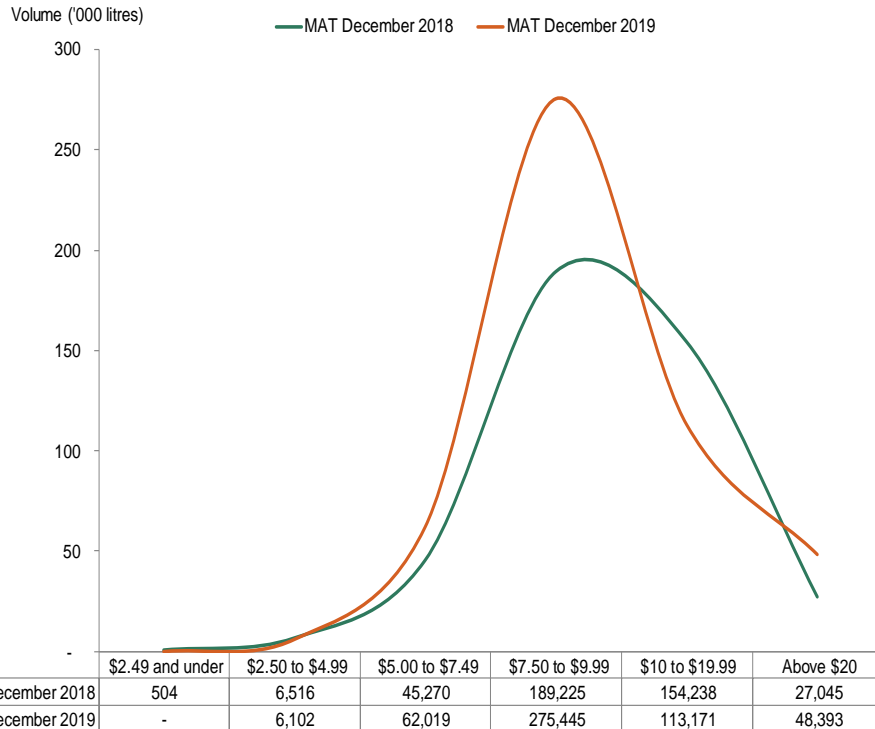


# Packaged wine exports to United States Of America

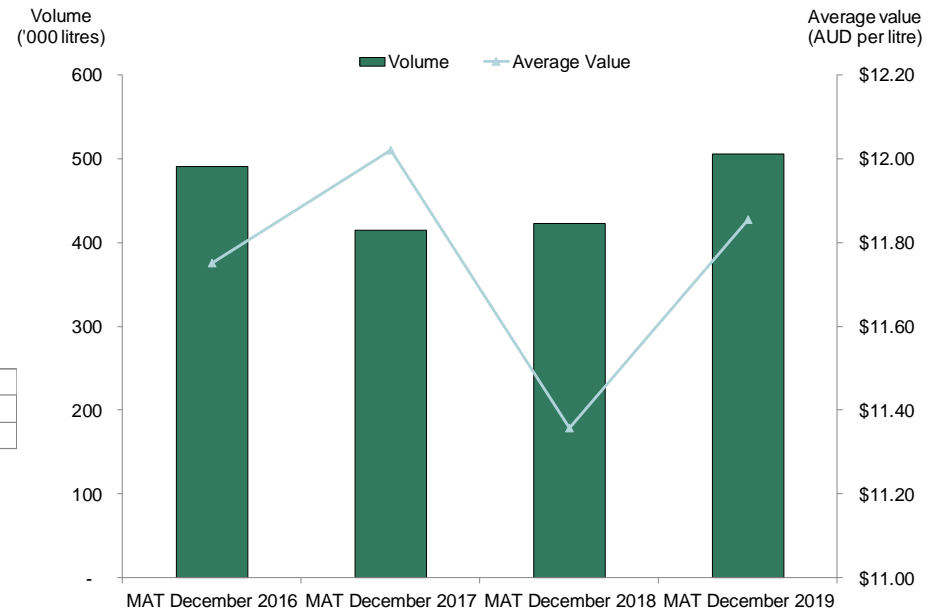
## Overview

		MAT December 2018	MAT December 2019	Change
Red wine	Volume (litres)	163,589	155,772	-5%
	Value (AUD)	\$2,058,647	\$2,179,751	6%
	Average value	\$12.58	\$13.99	11%
White wine	Volume (litres)	258,813	349,358	35%
	Value (AUD)	\$2,734,819	\$3,808,877	39%
	Average value	\$10.57	\$10.90	3%
Total wine	Volume (litres)	422,798	505,130	19%
	Value (AUD)	\$4,801,387	\$5,988,628	25%
	Average value	\$11.36	\$11.86	4%

## Total wine by price point



## Total volume and average value

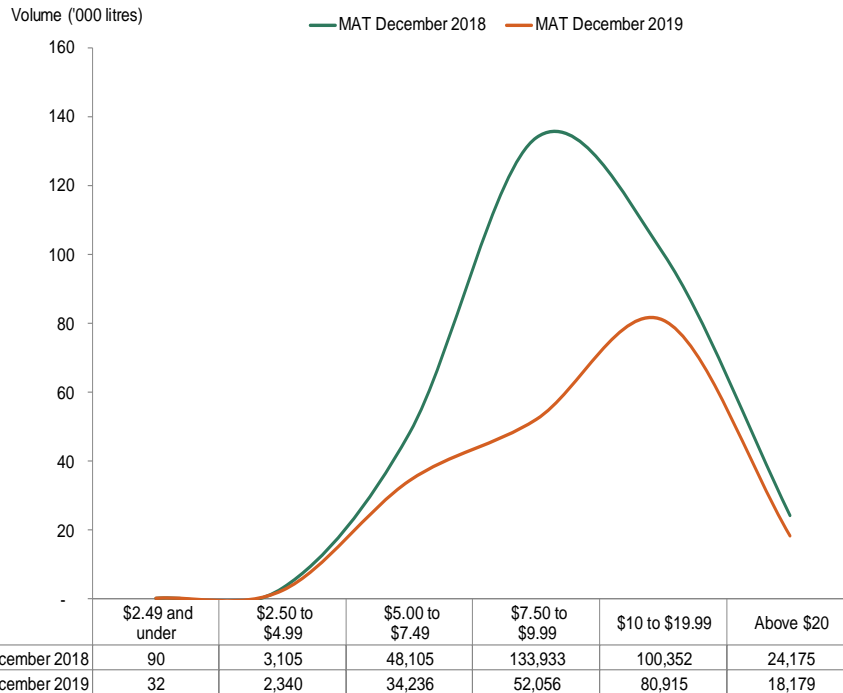


# Packaged wine exports to Hong Kong

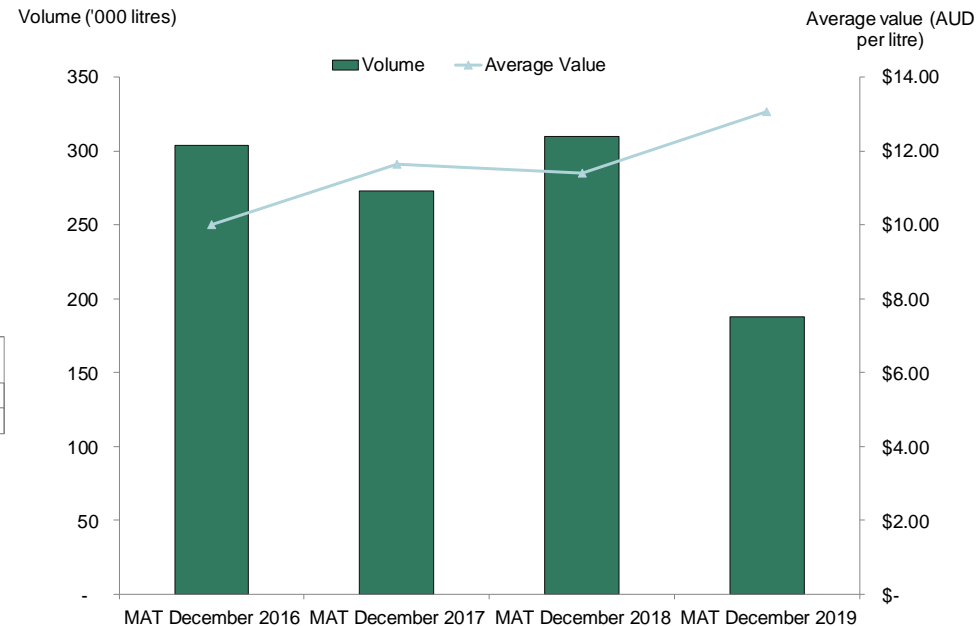
## Overview

		MAT December 2018	MAT December 2019	Change
Red wine	Volume (litres)	205,522	92,194	-55%
	Value (AUD)	\$2,219,270	\$1,317,106	-41%
	Average value	\$11	\$14	32%
White wine	Volume (litres)	104,228	95,473	-8%
	Value (AUD)	\$1,310,248	\$1,133,674	-13%
	Average value	\$12.57	\$11.87	-6%
Total wine	Volume (litres)	309,759	187,757	-39%
	Value (AUD)	\$3,529,719	\$2,452,379	-31%
	Average value	\$11.40	\$13.06	15%

## Total wine by price point



## Total volume and average value

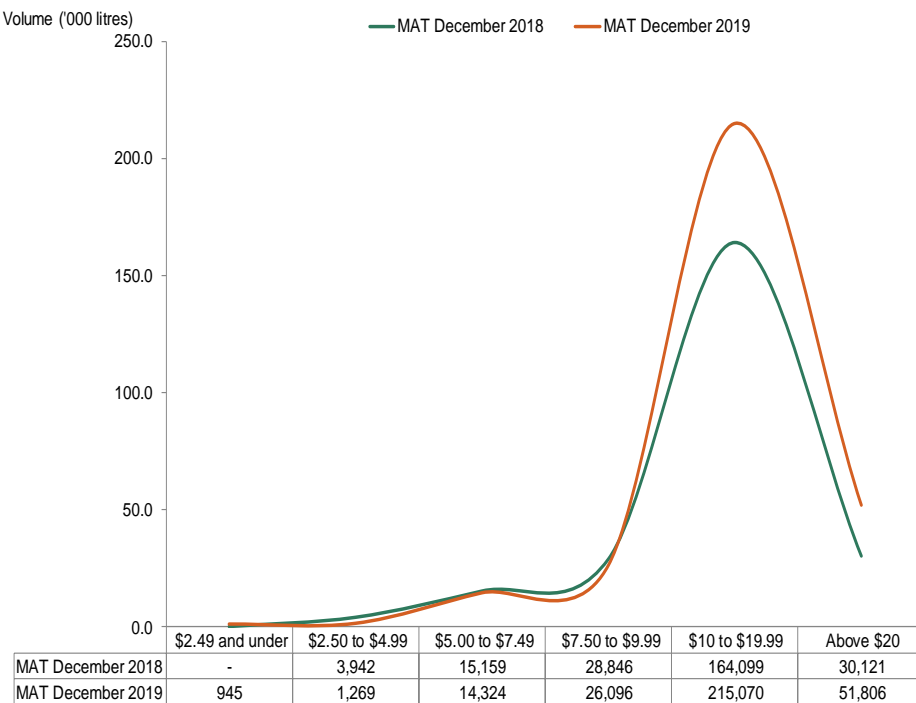


# Packaged wine exports to Singapore

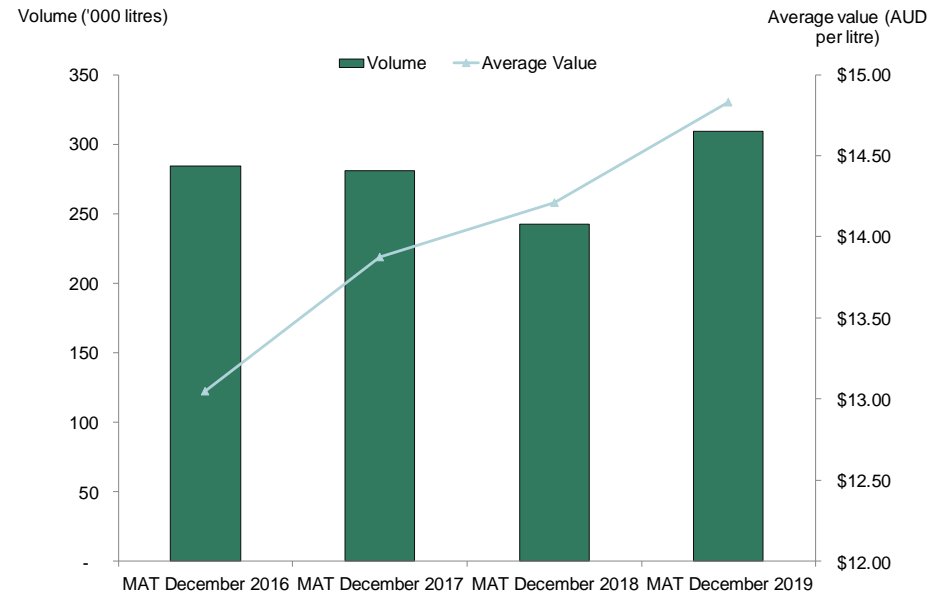
## Overview

		MAT December 2018	MAT December 2019	Change
Red wine	Volume (litres)	137,637	173,710	26%
	Value (AUD)	\$2,039,795	\$2,590,456	27%
	Average value	\$14.82	\$14.91	1%
White wine	Volume (litres)	104,340	134,669	29%
	Value (AUD)	\$1,398,871	\$1,982,395	42%
	Average value	\$13.41	\$14.72	10%
Total wine	Volume (litres)	242,166	309,509	28%
	Value (AUD)	\$3,441,390	\$4,589,300	33%
	Average value	\$14.21	\$14.83	4%

## Total wine by price point



## 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 VIC.
- 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 2019 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 2019 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.