

Wine
Australia
providing
insights for
Australian
Wine

Western Australia
Export Report
MAT March 2020

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’

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.

Provisions of the *Copyright Act 1968* apply to the contents of this publication, all other right reserved. For further copyright authorisation please see www.wineaustralia.com

Estimate of overall state by state exports

	MAT March 2020		Change %	
	Volume (million L)	Value (million AUD)	Volume	Value
SA	365	\$1,870	-8%	8%
NSW	211	\$502	-11%	-4%
VIC	142	\$428	-16%	-4%
WA	8.1	\$63	-16%	-2%
TAS	1.1	\$8.7	-8%	-4%
QLD	0.2	\$1.1	-13%	-36%
ACT	0.05	\$0.5	166%	102%
Total	728	\$2,873	-11%	3%

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.

Contents

All state GI claim exports – volume, value & avg. value	5
Packaged exports over time – volume, value & avg. value	6
Packaged exports by destination over time – volume & value	7
Packaged exports by price point and destination – volume	8
Packaged exports by colour/wine style – volume	9
Packaged exports by colour/wine style – value	10
Packaged exports by colour/wine style – average value	11
Packaged exports by top 15 destinations – volume	12
Packaged exports by top 15 destinations – value	13
Packaged exports by top 15 destinations – average value	14
Total packaged exports by price point – volume	15
Red packaged exports by price point – volume	16
White packaged exports by price point – volume	17
Packaged wine exports to no. 1 destination	18
Packaged wine exports to no. 2 destination	19
Packaged wine exports to no. 3 destination	20
Packaged wine exports to no. 4 destination	21
Packaged wine exports to no. 5 destination	22

All state GI claims

Location claim	Volume		Value		Average Value	
	('000 litres)	Change	('000 AUD)	Change	AUD per litre	Change
Margaret River	2,513	2%	\$31,720	4%	\$12.62	3%
Western Australia	1,236	-20%	\$8,621	-13%	\$6.97	9%
Great Southern	242	15%	\$2,557	10%	\$10.58	-4%
Frankland River	233	-40%	\$2,338	-30%	\$10.04	16%
Geographe	124	23%	\$851	4%	\$6.83	-16%
Mount Barker	75	-30%	\$853	-2%	\$11.33	39%
South West Australia	61	-60%	\$473	-47%	\$7.81	34%
Blackwood Valley	46	467%	\$474	543%	\$10.26	13%
Perth Hills	40	87%	\$560	127%	\$14.17	21%
Pemberton	36	-38%	\$405	-25%	\$11.20	20%
Manjimup	31	-46%	\$311	-22%	\$10.02	45%
Swan Valley	29	80%	\$270	70%	\$9.38	-5%
Frankland	29	-5%	\$307	-4%	\$10.76	1%
Greater Perth	14	211%	\$74	130%	\$5.36	-26%
Denmark	5	-28%	\$79	-3%	\$16.91	36%
Porongurup	2	31%	\$32	-20%	\$12.99	-39%
Swan District	2	-44%	\$22	-43%	\$10.35	3%
Albany	0		\$5		\$12.37	na
Peel		-100%		-100%		

GI claims over time

	Volume		Value		Average Value AUD per	
	'000 litres	Change	'000 AUD	Change	litre	Change
MAT March 2012	5,974	19%	\$46,592	15%	\$7.80	-3%
MAT March 2013	5,848	-2%	\$46,194	-1%	\$7.90	1%
MAT March 2014	4,510	-23%	\$38,728	-16%	\$8.59	9%
MAT March 2015	4,218	-6%	\$37,259	-4%	\$8.83	3%
MAT March 2016	4,176	-1%	\$39,485	6%	\$9.46	7%
MAT March 2017	4,763	14%	\$46,613	18%	\$9.79	4%
MAT March 2018	4,893	3%	\$49,456	6%	\$10.11	3%
MAT March 2019	5,190	6%	\$50,569	2%	\$9.74	-4%
MAT March 2020	4,718	-9%	\$49,951	-1%	\$10.59	9%

GI claims by country and year

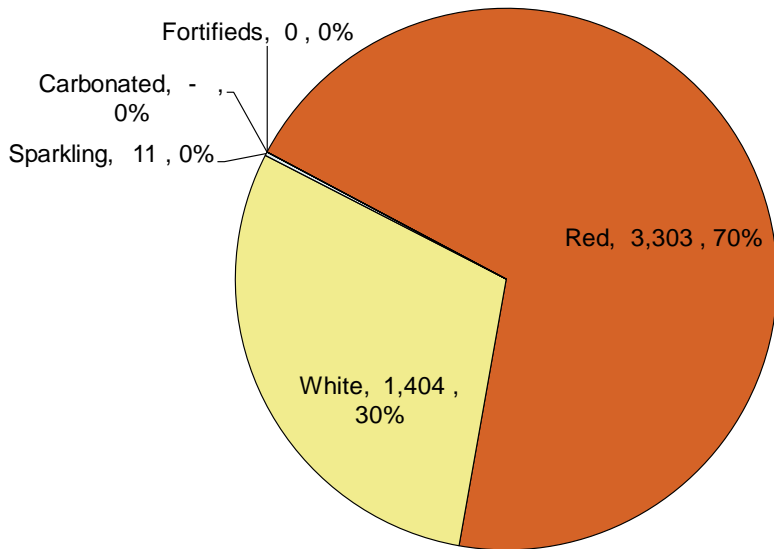
	MAT March									
	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Volume ('000 litres)										
Canada	418	417	367	294	263	191	224	177	160	144
China, Pr	900	1,519	1,791	1,527	1,303	1,172	1,734	2,086	2,369	2,167
Denmark	67	94	86	86	99	82	63	71	32	31
Finland	27	102	98	64	87	114	124	141	114	106
France	55	86	68	66	68	39	38	51	23	16
Hong Kong	388	684	715	437	351	279	345	275	259	174
Japan	139	129	103	107	83	86	57	71	63	111
Malaysia	63	82	55	72	68	66	47	60	62	54
New Zealand	57	49	71	87	82	90	102	92	116	80
Ship	59	111	75	83	38	111	113	100	84	77
Singapore	279	284	264	246	263	296	283	258	276	283
Thailand	60	85	81	81	51	78	112	85	126	125
United Arab Emirates	85	69	257	77	83	150	63	77	44	32
United Kingdom	1,276	1,423	853	654	703	771	754	555	624	442
United States Of America	624	418	577	367	455	427	439	463	410	468
Value ('000 AUD)										
Canada	3,673	3,489	3,097	2,517	2,453	2,226	2,540	2,171	2,010	1,957
China, Pr	6,910	12,420	13,733	11,560	9,185	9,783	14,344	17,990	19,803	20,048
Denmark	518	723	665	595	760	733	585	682	363	338
Finland	169	623	608	475	648	839	894	1,029	932	940
France	721	860	647	753	780	414	432	512	318	213
Hong Kong	3,056	4,073	3,943	3,101	2,701	2,470	3,514	3,174	3,131	2,205
Japan	1,576	1,501	1,731	1,159	997	1,065	760	972	828	1,418
Malaysia	636	772	684	721	741	711	562	691	682	708
New Zealand	498	474	653	713	707	751	886	837	1,042	738
Ship	696	1,198	879	731	370	900	1,038	934	827	661
Singapore	3,275	3,331	3,291	3,204	3,333	3,780	3,716	3,639	3,899	4,283
Thailand	510	661	577	713	390	703	990	802	1,230	1,295
United Arab Emirates	861	825	2,068	1,120	920	1,219	975	1,018	607	496
United Kingdom	8,596	8,642	5,935	5,110	6,140	6,573	6,977	5,766	5,467	4,743
United States Of America	4,080	2,972	4,093	3,503	4,740	4,775	5,189	5,615	4,837	5,314

Packaged exports by price point and destination

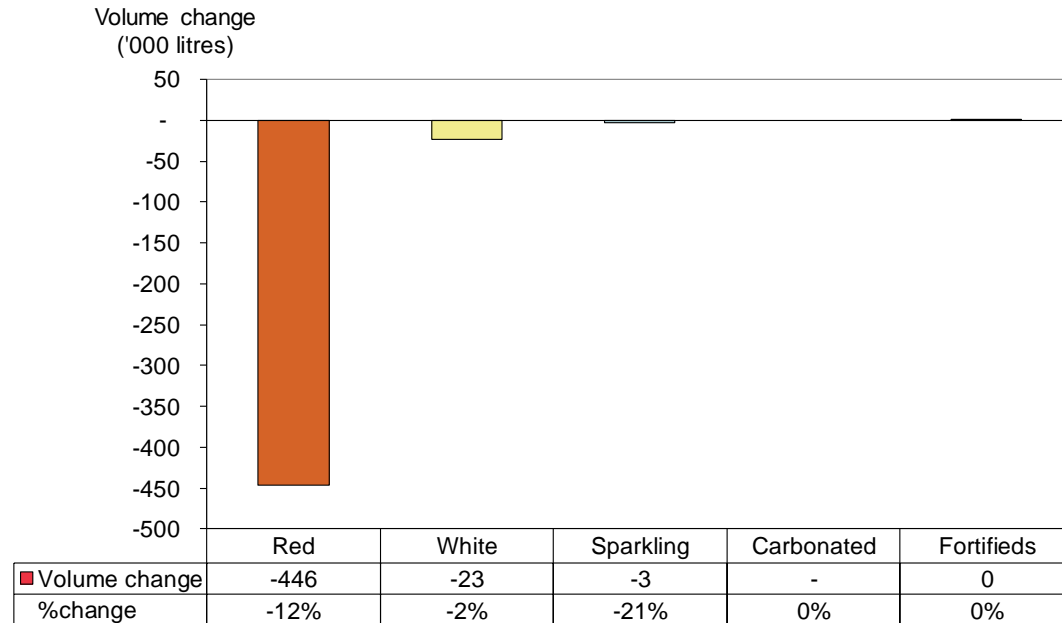
	\$2.49 and under		\$2.50 to \$4.99		\$5.00 to \$7.49		\$7.50 to \$9.99		\$10 to \$19.99		Above \$20		Total	
	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)
Hong Kong	0.5	445%	0.6	-87%	25.8	-48%	50.2	-48%	79.0	-9%	17.4	-22%	173.5	-33%
Canada	-	-100%	1.8	-25%	4.3	-56%	5.8	-66%	122.3	2%	9.7	-4%	143.9	-10%
China, Pr	5.6	-60%	427.1	-19%	664.7	-24%	371.2	34%	580.3	1%	118.2	13%	2,167.1	-9%
Japan	0.1	na	10.8	na	6.3	-41%	30.3	184%	51.8	43%	11.5	100%	110.8	75%
Netherlands	-	na	20.9	na	19.6	28%	11.9	77%	5.9	-16%	0.4	-67%	58.7	94%
New Zealand	-	na	2.7	-65%	32.6	-45%	30.0	88%	10.6	-62%	3.7	-23%	79.6	-31%
Singapore	1.3	2860%	0.8	-67%	14.4	-3%	27.2	5%	187.5	-6%	51.4	50%	282.7	2%
United Kingdom	0.1	na	24.9	-83%	115.9	-36%	192.6	-2%	77.2	0%	31.4	31%	442.3	-29%
United States Of America	-	-100%	6.1	-6%	77.8	80%	220.5	33%	125.3	-23%	38.5	23%	468.2	14%
Finland	-	na	-	na	-	-100%	92.3	-8%	13.6	886%	0.0	-40%	105.9	-7%
Indonesia	-	na	-	na	5.3	2121%	19.3	116%	21.2	26%	6.1	-33%	51.9	48%
Malaysia	-	na	0.3	-93%	10.2	-32%	13.9	-31%	23.1	33%	6.3	12%	53.8	-13%
Ship	-	-100%	31.4	1276%	8.8	-68%	4.7	-41%	30.5	-32%	1.3	53%	76.6	-8%
Thailand	-	na	1.8	-59%	12.2	94%	58.4	-25%	49.0	46%	3.9	20%	125.3	0%
Vietnam	-	na	1.7	174%	23.3	387%	43.6	341%	43.2	806%	1.2	23%	113.0	438%
Other	0.6	6%	1.6	27%	38.7	-74%	84.8	-37%	109.1	-14%	29.7	-6%	264.5	-40%
Total	8.3	-47%	532.5	-25%	1,059.9	-28%	1,256.6	7%	1,529.5	-1%	330.9	14%	4,717.7	-9%

Packaged exports by colour/wine style

Volume ('000 litres)

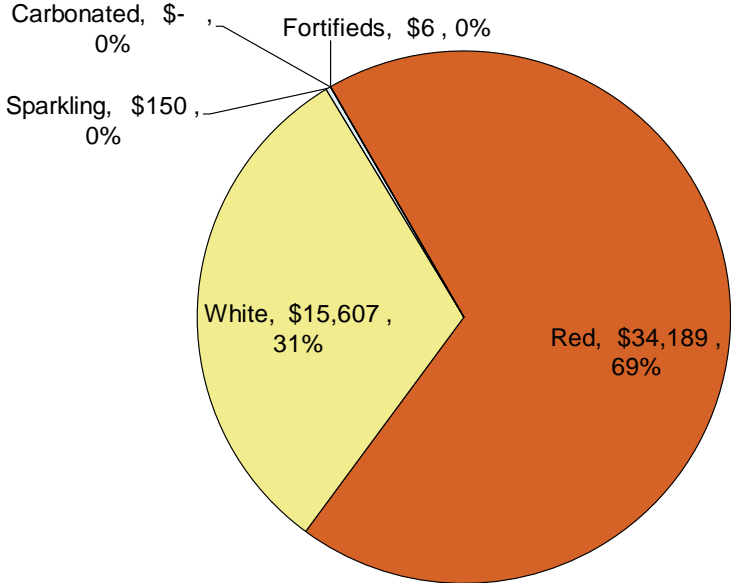


Change in volume

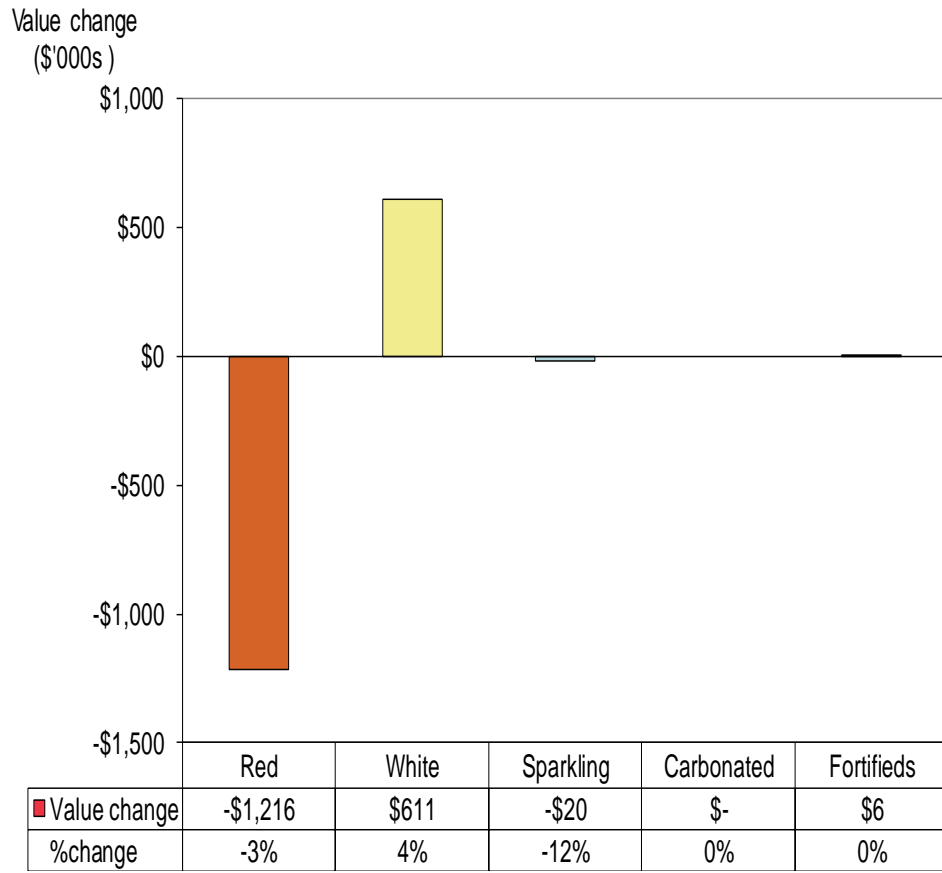


Packaged exports by colour/wine style

Value ('000 AUD)

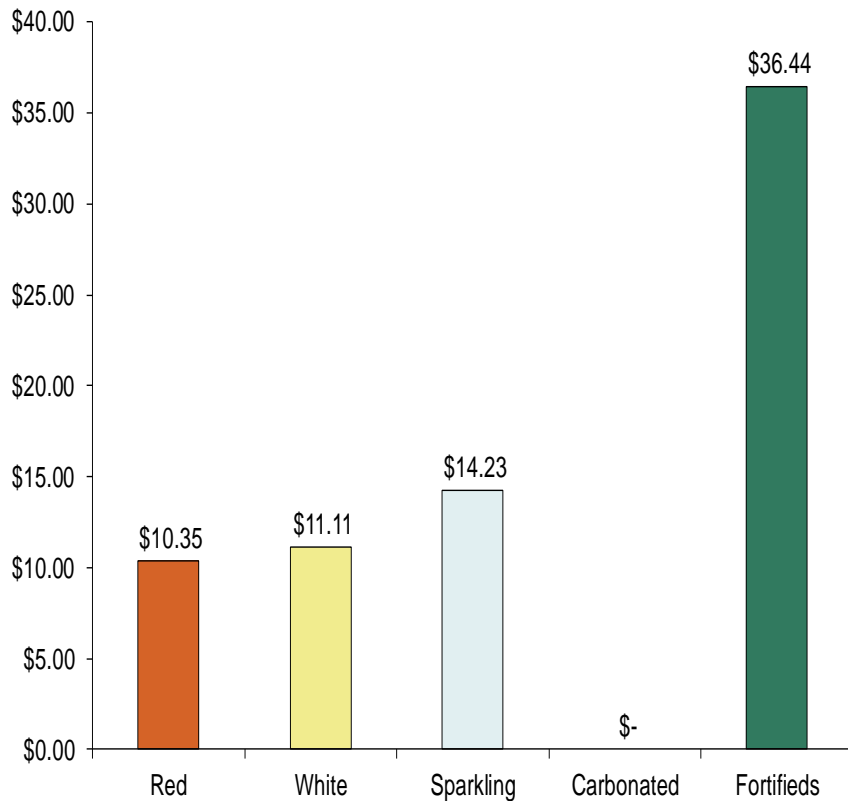


Change in value

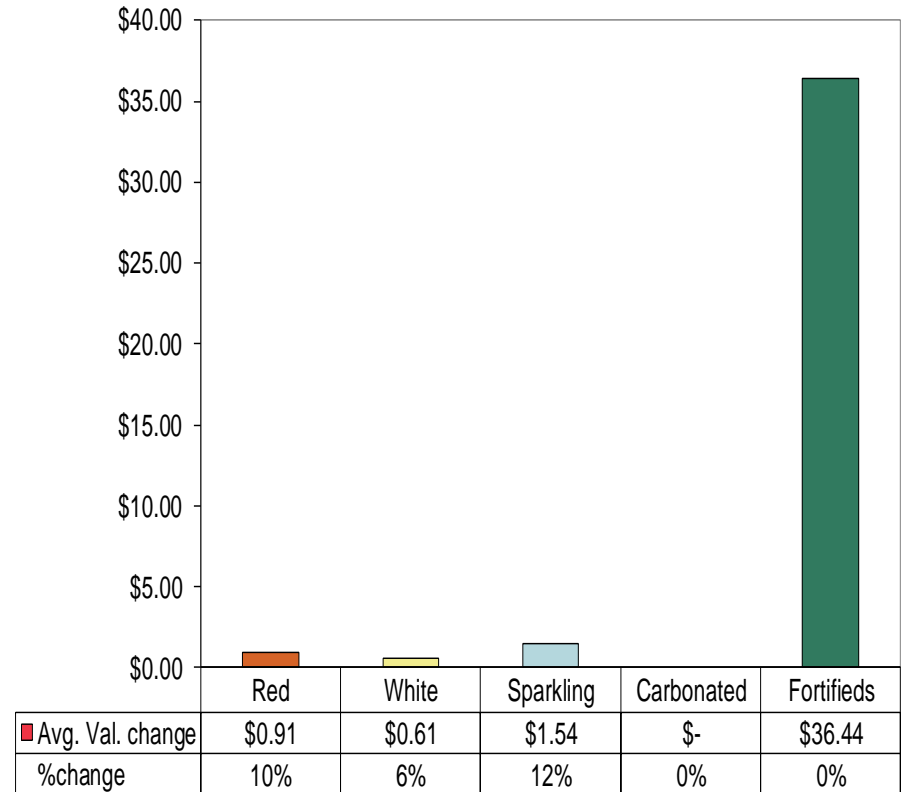


Packaged exports by colour/wine style

Average value (AUD per litre)

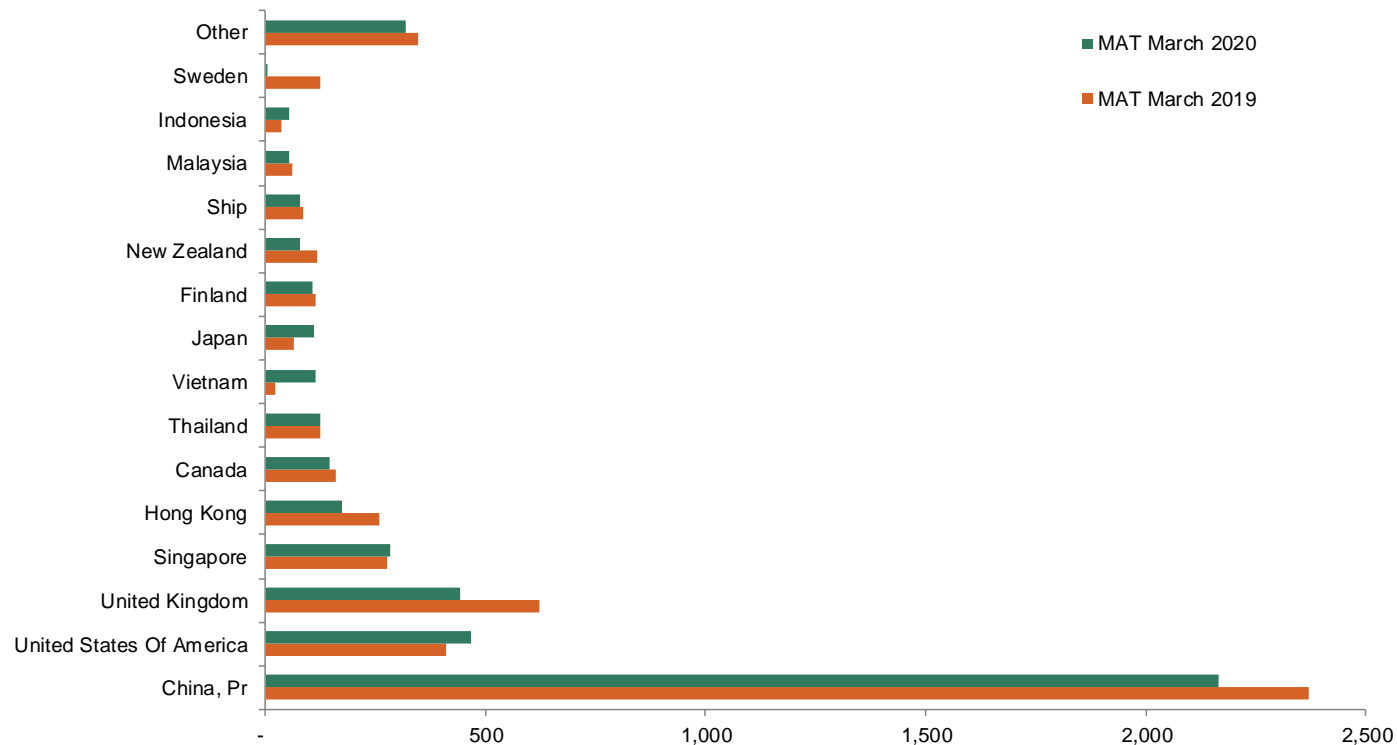


Change in average value



Packaged exports to top 15 destinations

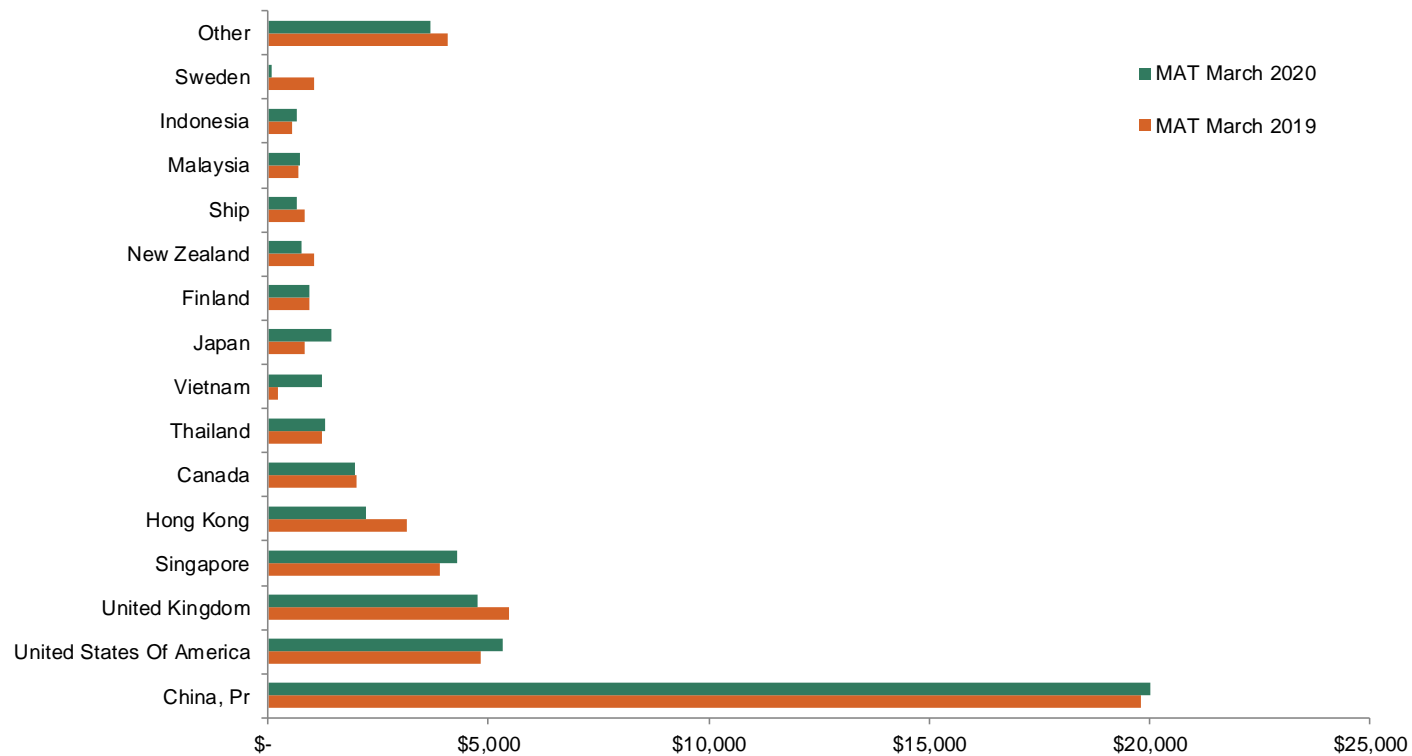
Volume ('000 litres)



	China, Pr	United States Of America	United Kingdom	Singapore	Hong Kong	Canada	Thailand	Vietnam	Japan	Finland	New Zealand	Ship	Malaysia	Indonesia	Sweden	Other
■ MAT March 2020	2,167	468	442	283	174	144	125	113	111	106	80	77	54	52	5	318
■ MAT March 2019	2,369	410	624	276	259	160	126	21	63	114	116	84	62	35	124	347

Packaged exports by top 15 destinations

Value ('000 AUD)



	China, Pr	United States Of America	United Kingdom	Singapore	Hong Kong	Canada	Thailand	Vietnam	Japan	Finland	New Zealand	Ship	Malaysia	Indonesia	Sweden	Other
■ MAT March 2020	\$20,04	\$5,314	\$4,743	\$4,283	\$2,205	\$1,957	\$1,295	\$1,206	\$1,418	\$940	\$738	\$661	\$708	\$659	\$90	\$3,685
■ MAT March 2019	\$19,80	\$4,837	\$5,467	\$3,899	\$3,131	\$2,010	\$1,230	\$212	\$828	\$932	\$1,042	\$827	\$682	\$537	\$1,044	\$4,089

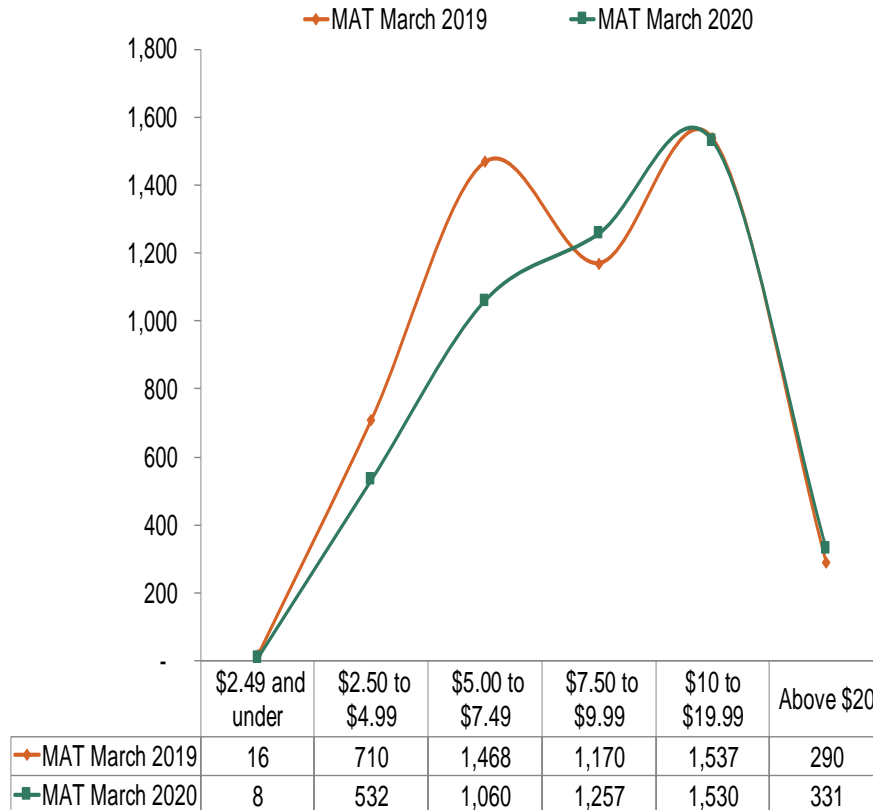
Packaged exports by top 15 destinations

Average value (AUD/litre FOB)



Packaged exports by price point

Volume ('000 litres)



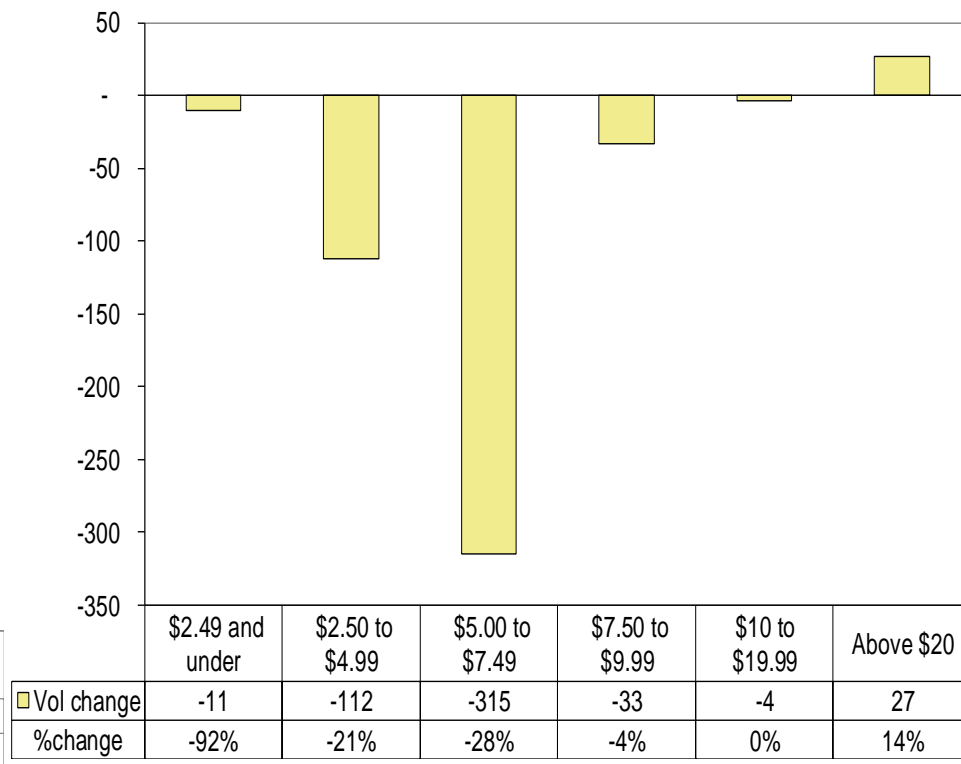
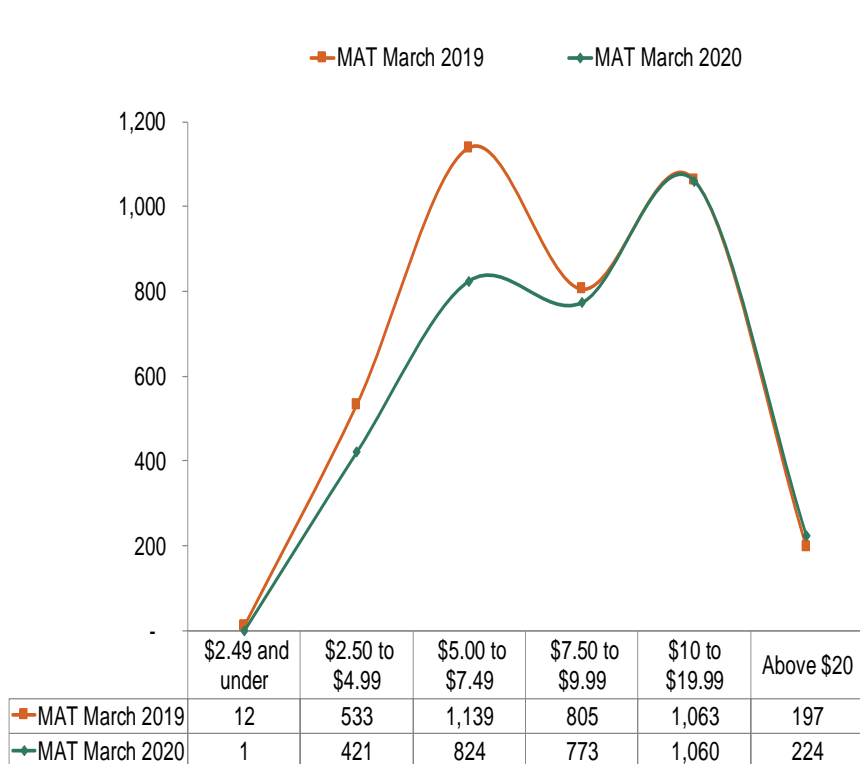
Change in volume



Packaged red wine exports by price point

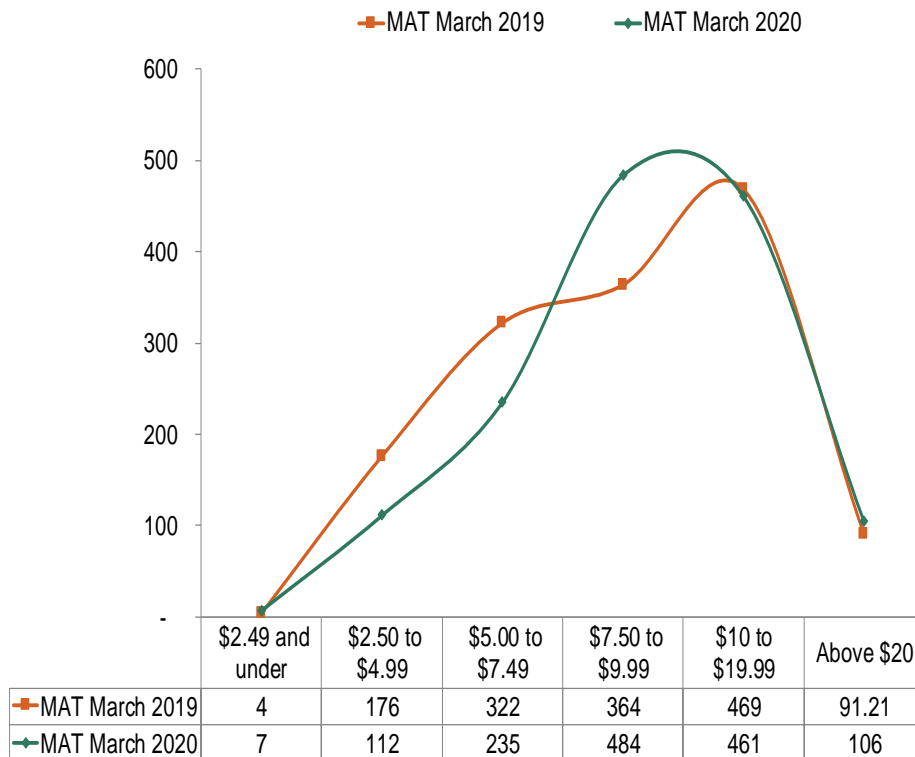
Volume ('000 litres)

Change in volume

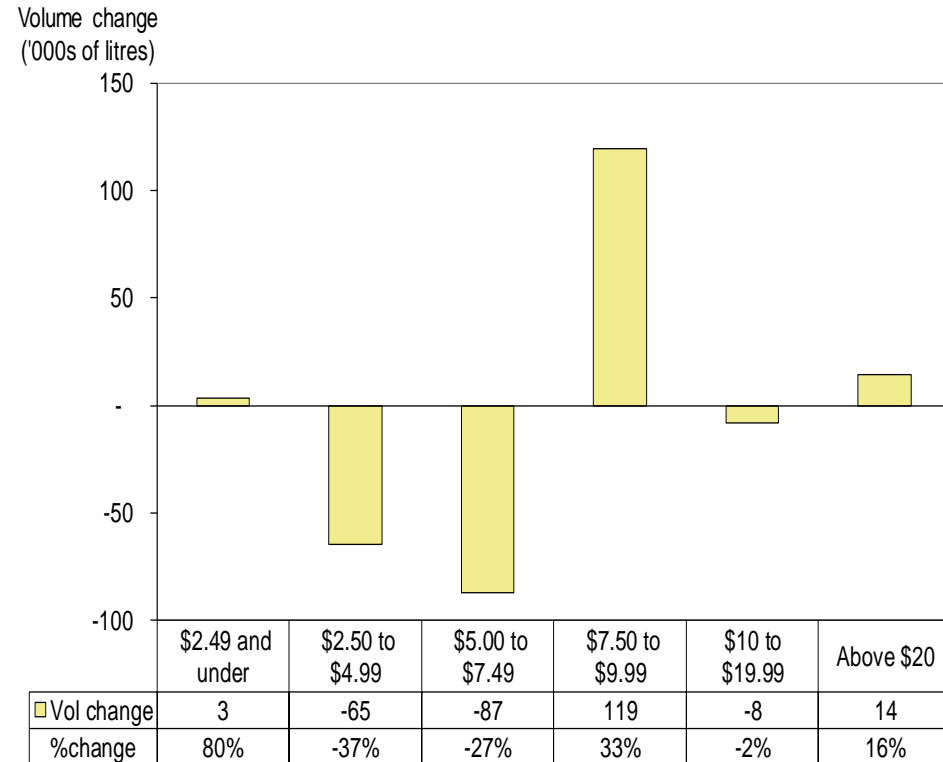


Packaged white wine exports by price point

Volume ('000 litres)



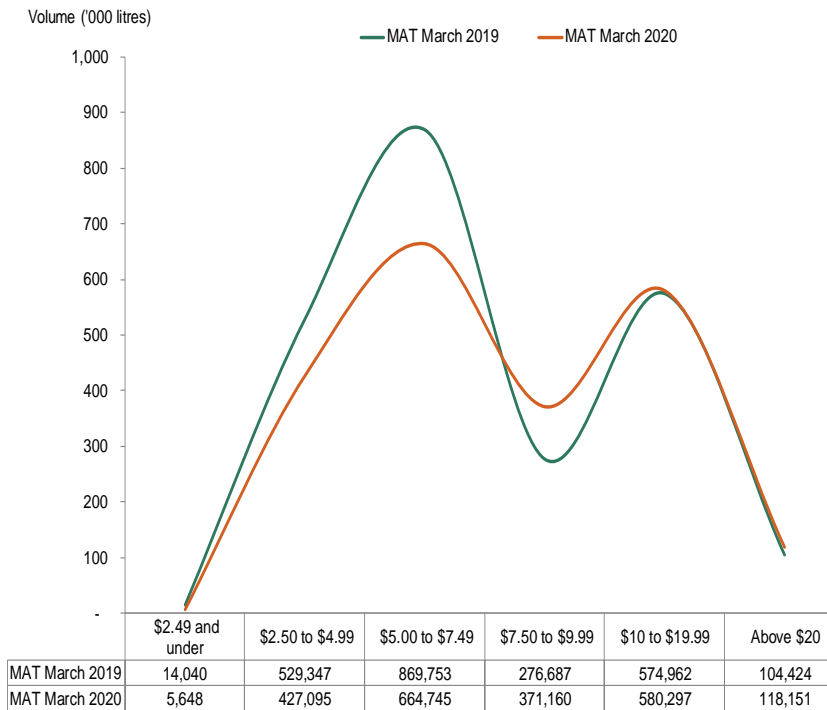
Change in volume



Packaged wine exports to China, Pr

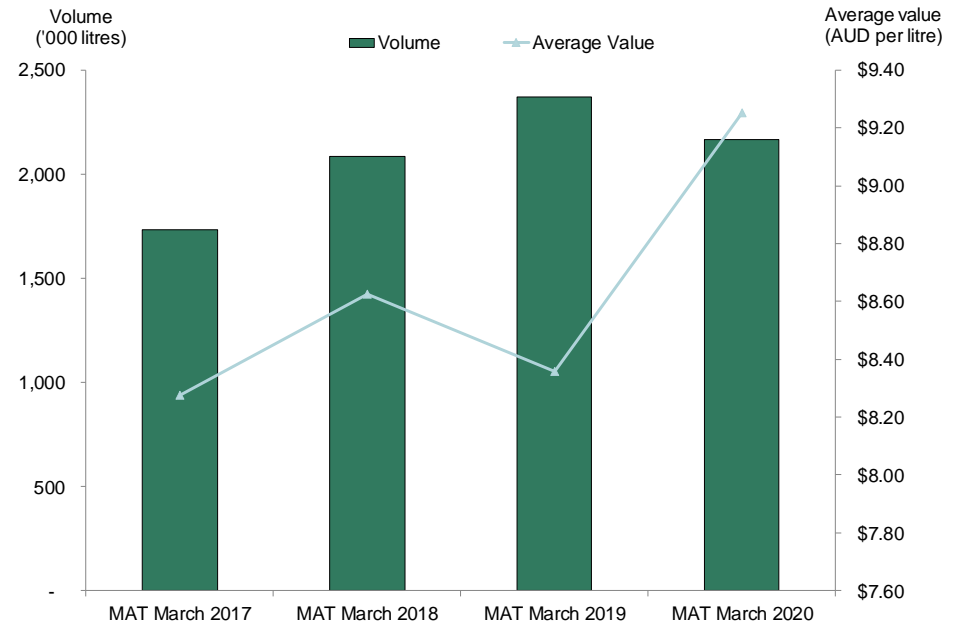
Overview

Total wine by price point



		MAT March 2019	MAT March 2020	Change
Red wine	Volume (litres)	2,198,259	2,015,693	-8%
	Value (AUD)	\$17,990,488	\$18,426,455	2%
	Average value	\$8.18	\$9.14	12%
White wine	Volume (litres)	162,021	147,339	-9%
	Value (AUD)	\$1,711,414	\$1,562,361	-9%
	Average value	\$10.56	\$10.60	0%
Total wine	Volume (litres)	2,369,213	2,167,094	-9%
	Value (AUD)	19,803,185	20,048,141	1%
	Average value	\$8.36	\$9.25	11%

Total volume and average value

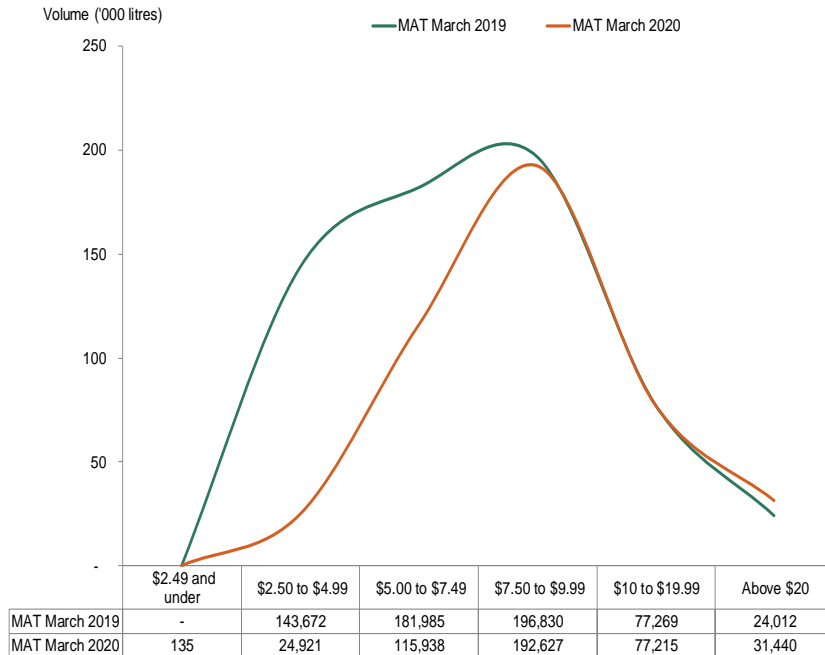


Packaged wine exports to United Kingdom

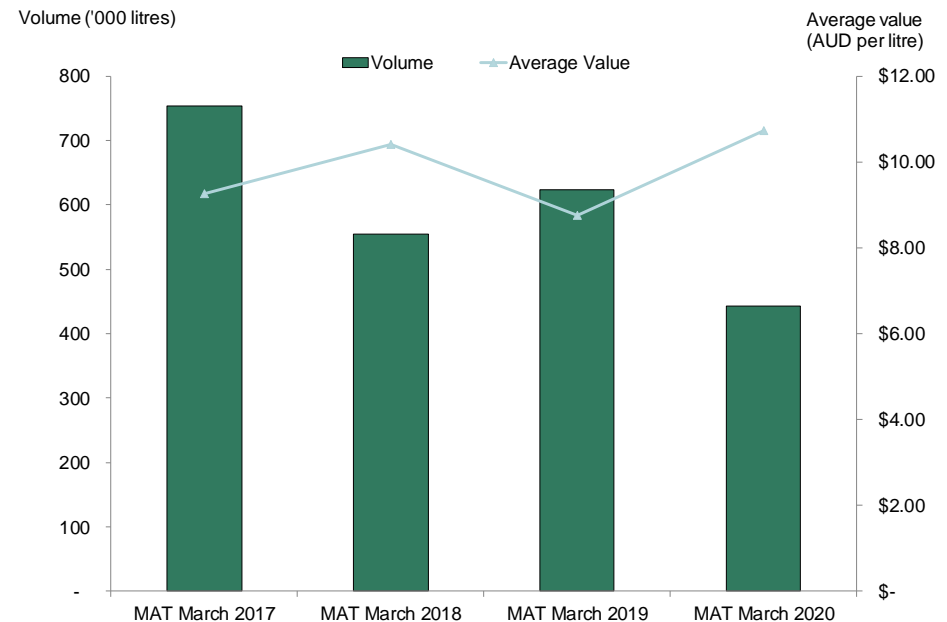
Overview

		MAT March 2019	MAT March 2020	Change
Red wine	Volume (litres)	286,699	213,327	-26%
	Value (AUD)	\$2,864,026	\$2,457,132	-14%
	Average value	\$9.99	\$11.52	15%
White wine	Volume (litres)	336,744	228,733	-32%
	Value (AUD)	\$2,596,054	\$2,282,436	-12%
	Average value	\$7.71	\$9.98	29%
Total wine	Volume (litres)	623,767	442,275	-29%
	Value (AUD)	\$5,466,618	\$4,742,712	-13%
	Average value	\$8.76	\$10.72	22%

Total wine by price point



Total volume and average value

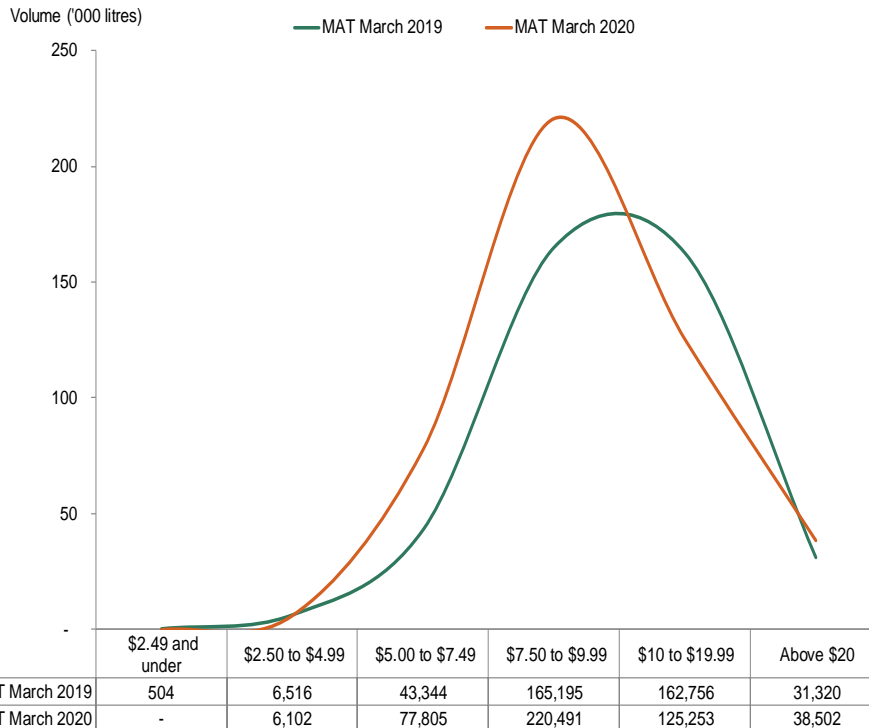


Packaged wine exports to United States Of America

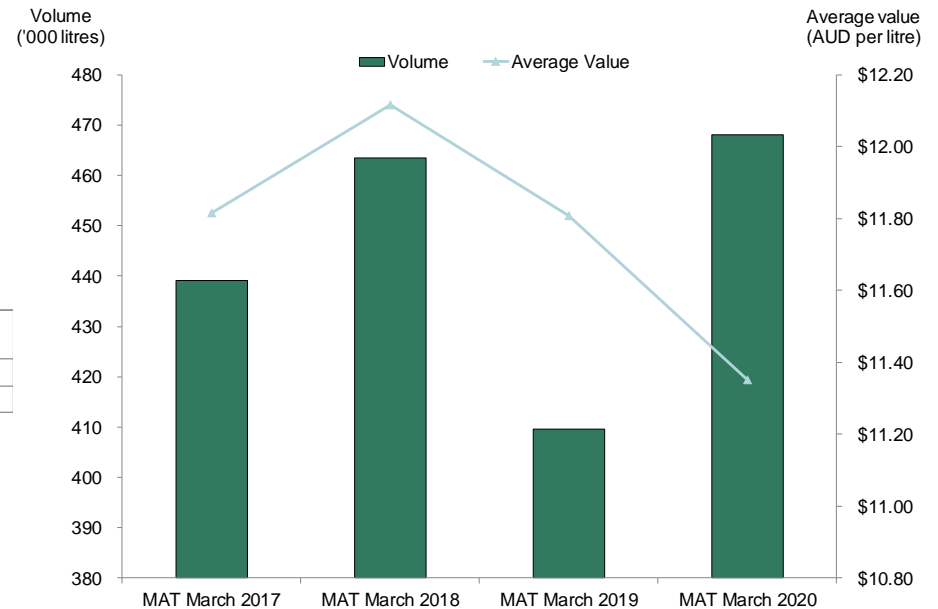
Overview

		MAT March 2019	MAT March 2020	Change
Red wine	Volume (litres)	166,388	160,389	-4%
	Value (AUD)	\$2,073,445	\$2,077,700	0%
	Average value	\$12.46	\$12.95	4%
White wine	Volume (litres)	242,852	307,575	27%
	Value (AUD)	\$2,755,278	\$3,234,797	17%
	Average value	\$11.35	\$10.52	-7%
Total wine	Volume (litres)	409,635	468,153	14%
	Value (AUD)	\$4,836,644	\$5,314,492	10%
	Average value	\$11.81	\$11.35	-4%

Total wine by price point



Total volume and average value

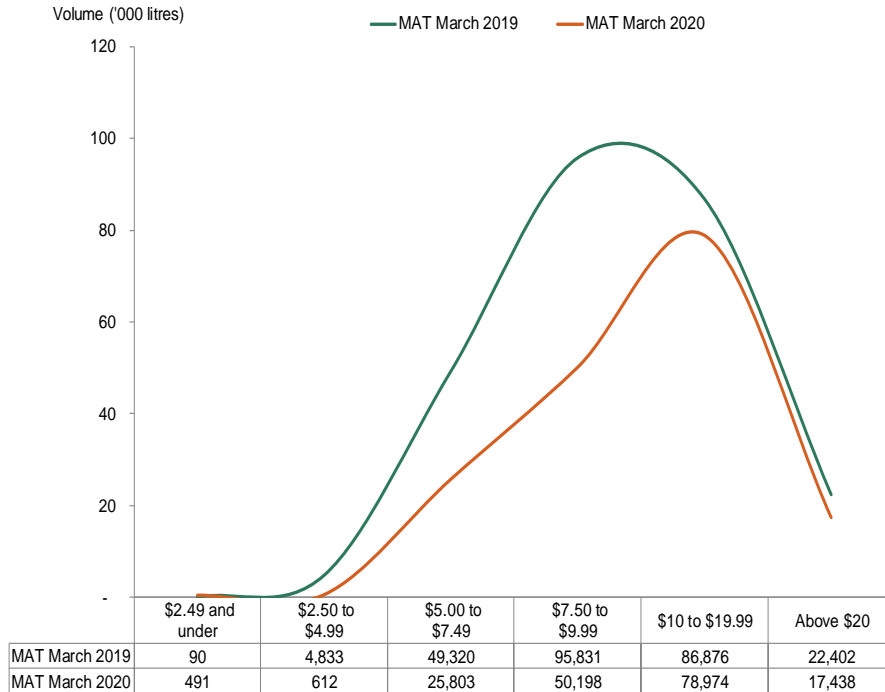


Packaged wine exports to Hong Kong

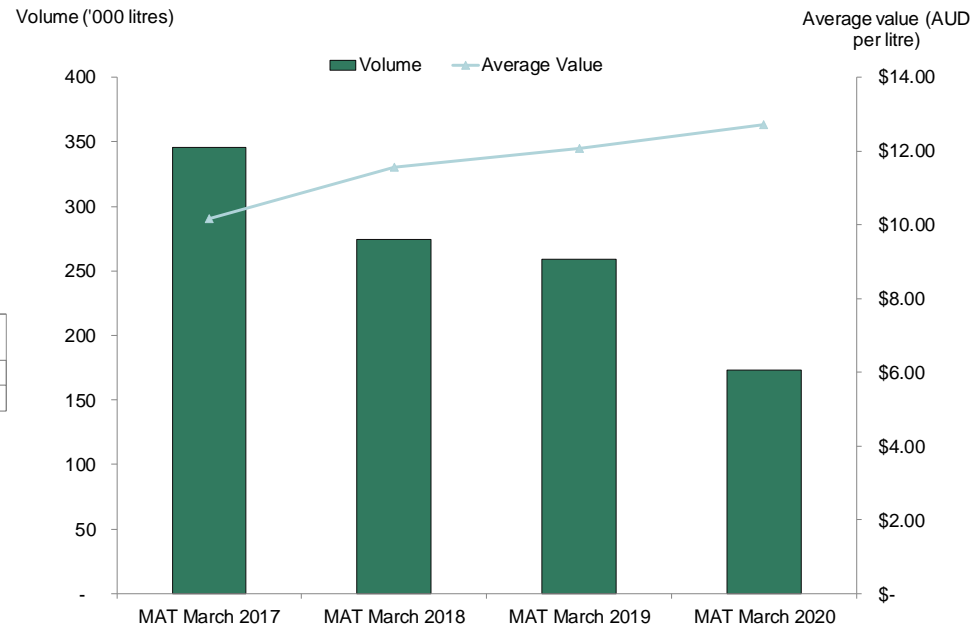
Overview

		MAT March 2019	MAT March 2020	Change
Red wine	Volume (litres)	161,396	86,633	-46%
	Value (AUD)	\$1,914,150	\$1,120,716	-41%
	Average value	\$12	\$13	9%
White wine	Volume (litres)	97,946	86,765	-11%
	Value (AUD)	\$1,216,924	\$1,082,450	-11%
	Average value	\$12.42	\$12.48	0%
Total wine	Volume (litres)	259,352	173,515	-33%
	Value (AUD)	\$3,131,275	\$2,205,427	-30%
	Average value	\$12.07	\$12.71	5%

Total wine by price point



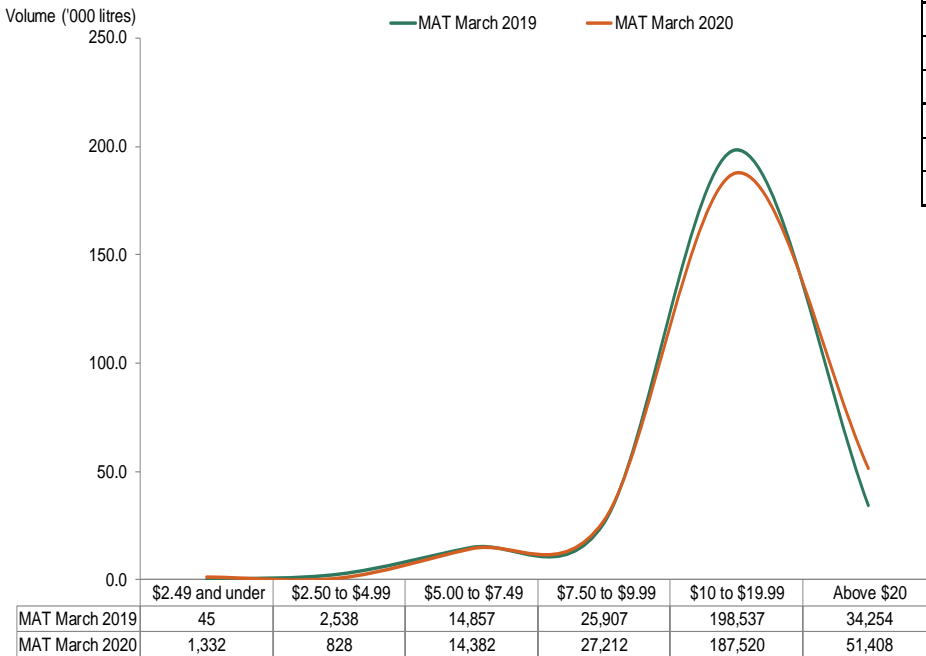
Total volume and average value



Packaged wine exports to Singapore

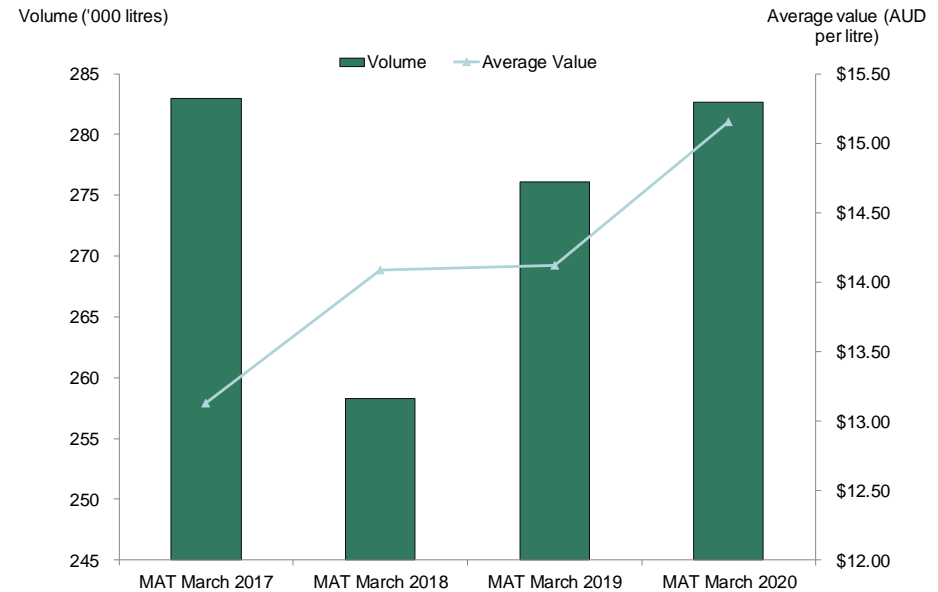
Overview

Total wine by price point



		MAT March 2019	MAT March 2020	Change
Red wine	Volume (litres)	164,702	149,255	-9%
	Value (AUD)	\$2,365,420	\$2,304,854	-3%
	Average value	\$14.36	\$15.44	8%
White wine	Volume (litres)	111,251	132,320	19%
	Value (AUD)	\$1,530,863	\$1,962,578	28%
	Average value	\$13.76	\$14.83	8%
Total wine	Volume (litres)	276,138	282,681	2%
	Value (AUD)	\$3,899,019	\$4,283,451	10%
	Average value	\$14.12	\$15.15	7%

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 March 2020 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 March 2020 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.