

Wine
Australia
providing
insights for
Australian
Wine

Geelong
Export Report:
Bottled wine
MAT March 2019

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.

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

Contents

Bottled exports over time – volume, value & avg. value	p4
Bottled exports by destination over time – volume and value	p5
Bottled exports by price point and destination – volume	p6
Bottled exports by colour/wine style – volume	p7
Bottled exports by colour/wine style – value	p8
Bottled exports by colour/wine style – average value	p9
Bottled exports by top 15 destinations – volume	p10
Bottled exports by top 15 destinations – value	p11
Bottled exports by top 15 destinations – average value	p12
Total bottled exports by price point – volume	p13
Red bottled exports by price point – volume	p14
White bottled exports by price point – volume	p15
Bottled wine exports to no. 1 destination	p16
Bottled wine exports to no. 2 destination	p17
Bottled wine exports to no. 3 destination	p18
Bottled wine exports to no. 4 destination	p19
Bottled wine exports to no. 5 destination	p20

GI claims over time

	Volume		Value		Average Value	
	'000 litres	Change	'000 AUD	Change	AUD per litre	Change
MAT March 2011	36	-57%	\$414	-47%	\$11.37	25%
MAT March 2012	40	9%	\$540	30%	\$13.66	20%
MAT March 2013	96	143%	\$792	47%	\$8.24	-40%
MAT March 2014	71	-26%	\$612	-23%	\$8.57	4%
MAT March 2015	67	-6%	\$777	27%	\$11.57	35%
MAT March 2016	64	-4%	\$890	15%	\$13.81	19%
MAT March 2017	69	7%	\$844	-5%	\$12.26	-11%
MAT March 2018	77	12%	\$1,128	34%	\$14.61	19%
MAT March 2019	55	-29%	\$1,029	-9%	\$18.71	28%

GI claims by country

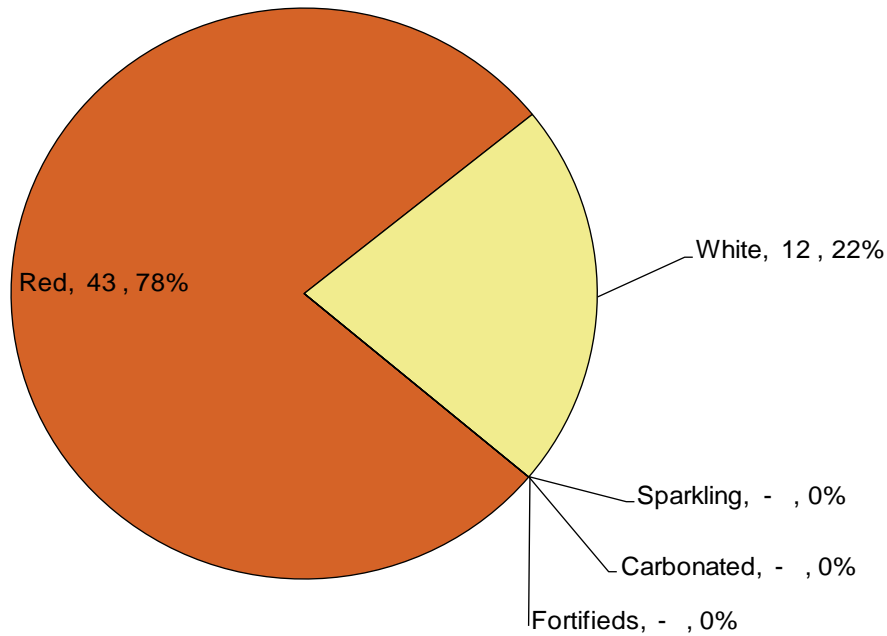
	MAT March										
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	
Volume ('000 litres)											
Canada	5	7	4	2	0	0	-	-	0	0	
China, Pr	41	10	16	43	54	57	53	51	64	43	
Denmark	1	-	0	0	0	1	1	1	0	-	
Hong Kong	9	3	5	10	9	3	2	2	1	1	
India	2	-	0	1	0	0	0	0	0	0	
Indonesia	1	-	0	1	1	0	0	0	-	0	
Japan	14	6	7	14	1	0	2	1	1	2	
Malaysia	0	0	0	-	-	-	0	1	-	0	
Russia	-	3	-	-	-	-	-	-	-	-	
Singapore	0	0	0	0	2	2	2	2	2	2	
Sweden	2	-	0	1	1	0	2	2	2	1	
Taiwan	0	-	0	-	-	-	-	0	2	0	
United Arab Emirates	-	-	0	3	1	-	-	-	-	-	
United Kingdom	11	5	5	18	1	4	2	3	0	1	
United States Of America	-	-	-	2	-	-	1	6	5	1	
Value ('000 AUD)											
Canada	50	75	56	38	4	1	-	-	5	9	
China, Pr	277	110	160	245	341	553	541	431	828	736	
Denmark	10	-	7	17	5	27	37	28	8	-	
Hong Kong	96	44	99	127	127	74	63	56	31	33	
India	45	-	7	42	2	11	4	3	6	7	
Indonesia	8	-	0	17	15	1	0	1	-	3	
Japan	156	63	71	127	26	8	42	14	21	43	
Malaysia	7	5	2	-	-	-	2	13	-	0	
Russia	-	28	-	-	-	-	-	-	-	-	
Singapore	1	7	9	8	46	35	91	63	62	64	
Sweden	14	-	2	9	9	13	31	40	18	12	
Taiwan	10	-	8	-	-	-	-	1	74	11	
United Arab Emirates	-	-	3	26	22	-	-	-	-	-	
United Kingdom	105	41	93	116	15	54	40	62	10	33	
United States Of America	-	-	-	14	-	-	25	111	52	19	

Bottled exports by price point and destination

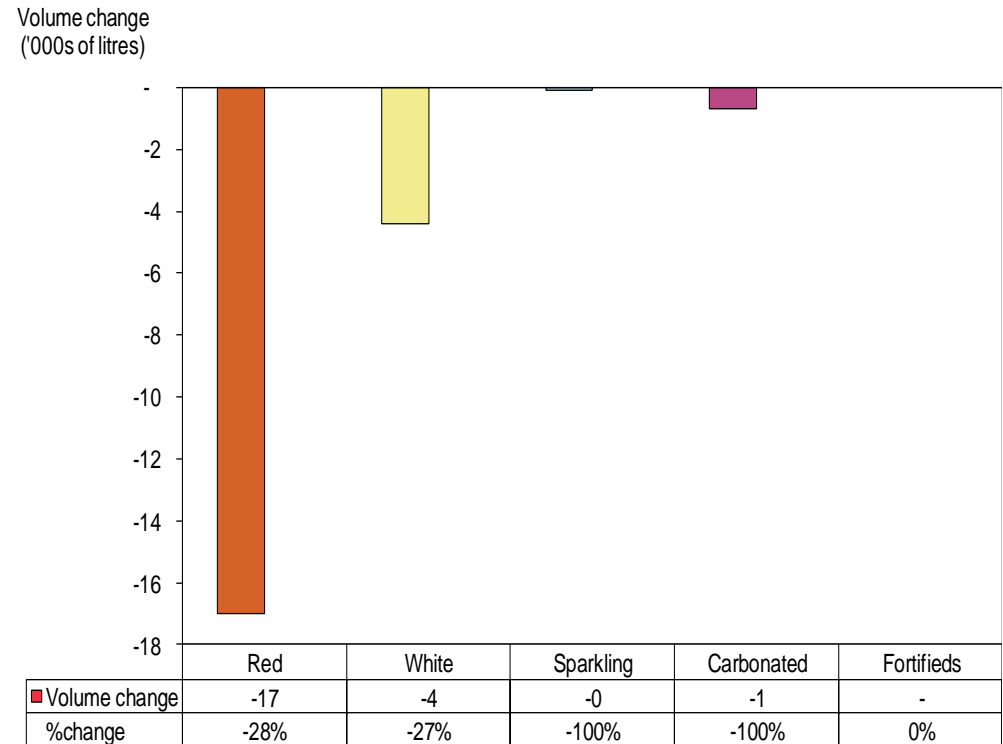
	\$2.49 and under		\$2.50 to \$4.99		\$5.00 to \$7.49		\$7.50 to \$9.99		\$10 to \$19.99		Above \$20		Total	
	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)
China, Pr	-	na	8	-53%	3	-17%	3	-58%	17	-44%	13	94%	43	-32%
Singapore	-	na	-	na	-	na	-	na	1	-10%	2	15%	2	9%
Norway	-	na	-	na	-	na	-	na	-	na	2	na	2	na
Japan	-	na	-	na	-	na	-	na	1	34%	1	106%	2	66%
Sweden	-	na	-	na	-	na	1	-32%	-	na	-	-100%	1	-33%
United Kingdom	-	na	-	na	-	na	-	na	-	-100%	1	254%	1	143%
Hong Kong	-	na	-	na	-	na	-	na	0	na	1	-2%	1	5%
Thailand	-	na	-	na	-	na	-	na	1	na	-	-100%	1	424%
United States Of America	-	na	-	na	-	na	-	na	-	-100%	1	na	1	-82%
Indonesia	-	na	-	na	-	na	0	na	0	na	0	na	0	na
Taiwan	-	na	-	na	-	na	-	na	-	-100%	0	-84%	0	-85%
Canada	-	na	-	na	-	na	-	na	-	na	0	174%	0	174%
India	-	na	-	na	-	na	-	na	-	na	0	14%	0	14%
Malaysia	-	na	-	na	-	na	-	na	-	na	0	na	0	na
Belgium	-	na	-	na	-	na	-	na	-	na	0	na	0	na
Other	-	na	-	na	-	na	-	na	-	na	-	-100%	-	-100%
Total	-	na	8	-53%	3	-17%	4	-50%	20	-47%	21	69%	55	-29%

Bottled exports by colour/wine style

Volume ('000 litres)



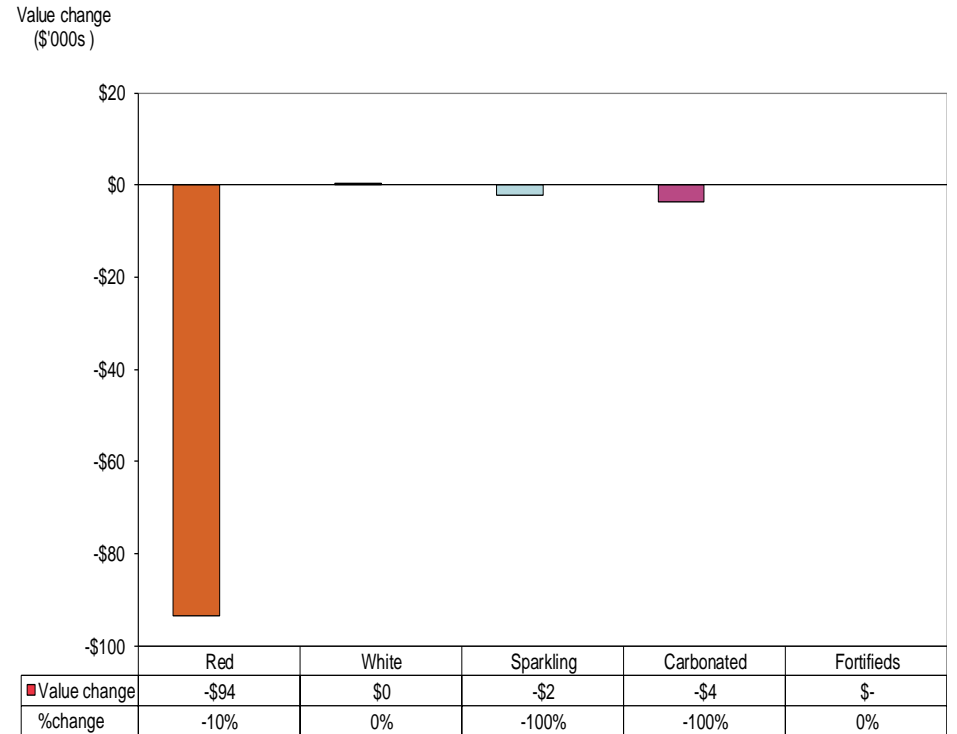
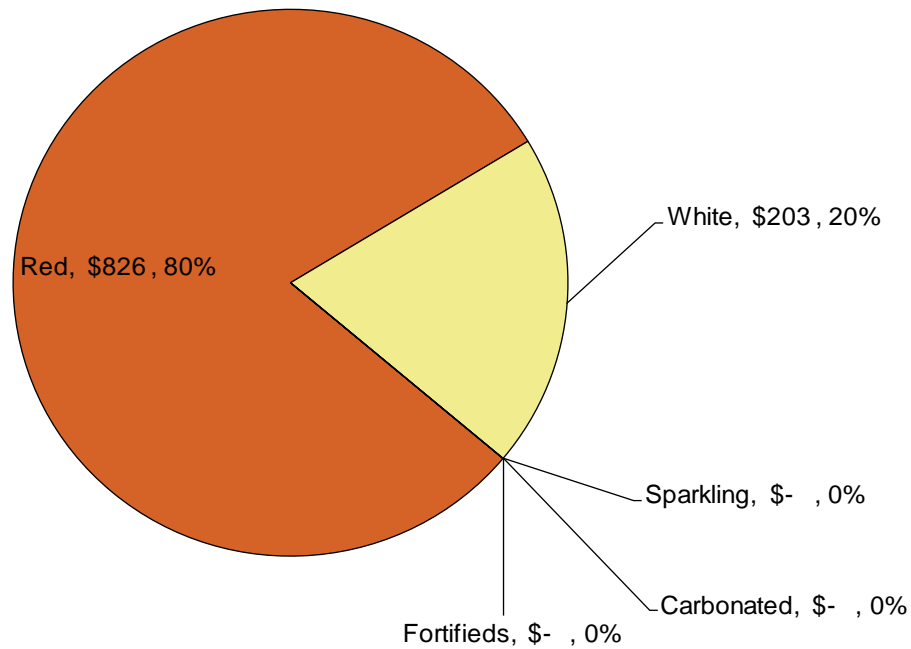
Change in volume



Bottled exports by colour/wine style

Value ('000 AUD)

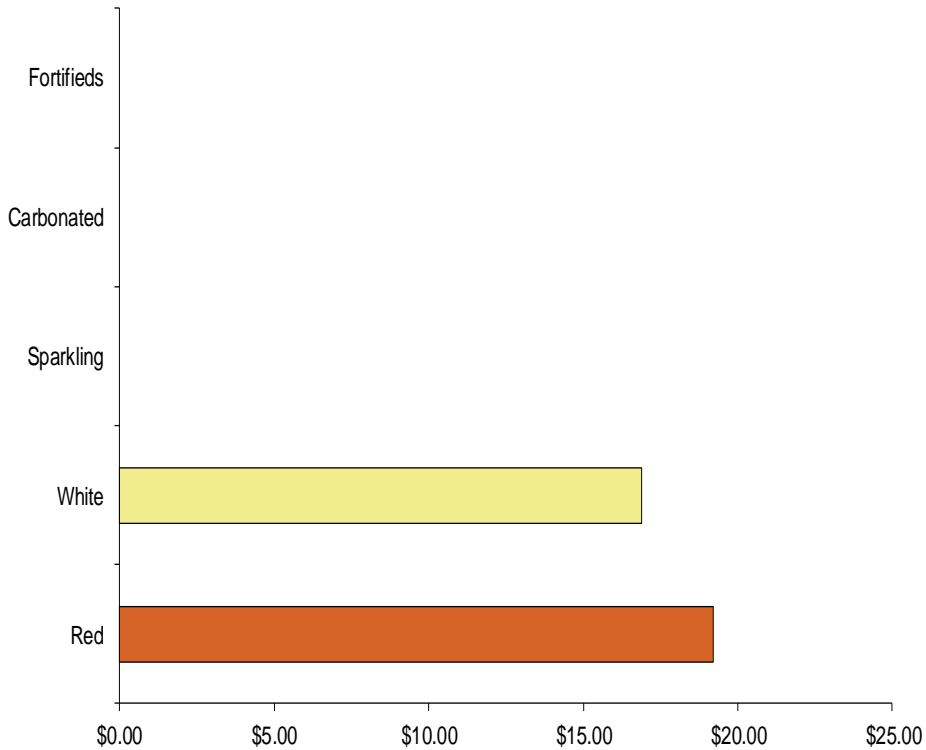
Change in value



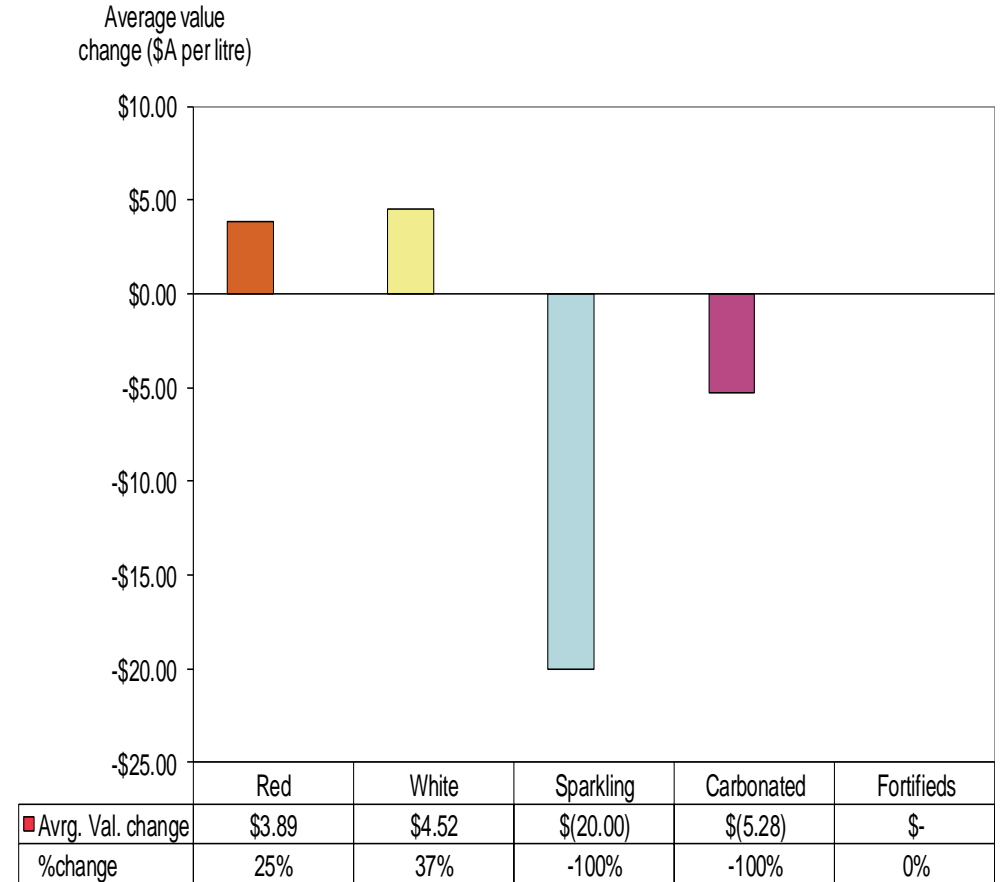
	Red	White	Sparkling	Carbonated	Fortifieds
Value change	-\$94	\$0	-\$2	-\$4	\$-
%change	-10%	0%	-100%	-100%	0%

Bottled exports by colour/wine style

Average value (AUD per litre)



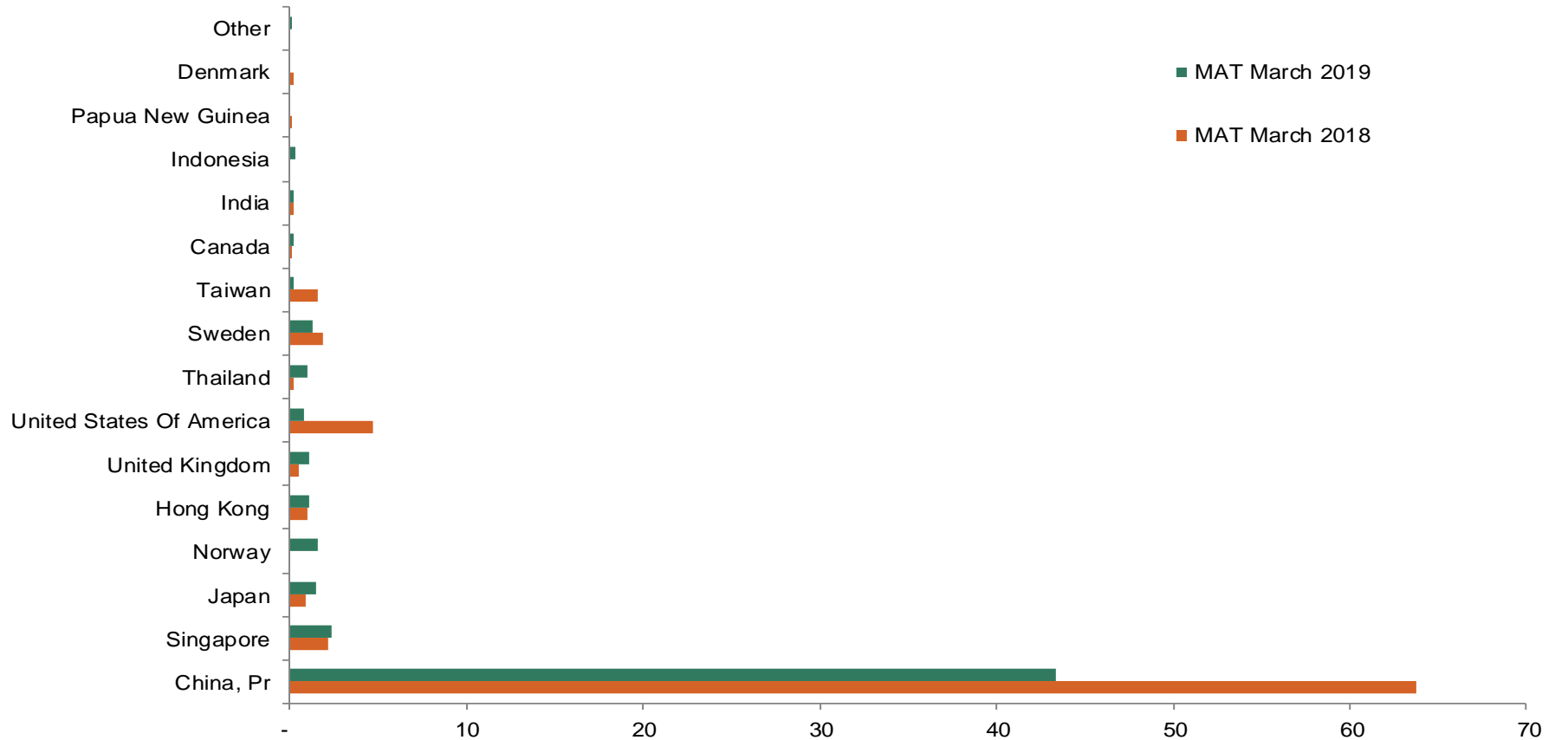
Change in average value



	Red	White	Sparkling	Carbonated	Fortifieds
■ Avg. Val. change	\$3.89	\$4.52	\$(20.00)	\$(5.28)	\$-
%change	25%	37%	-100%	-100%	0%

Bottled exports by top 15 destinations

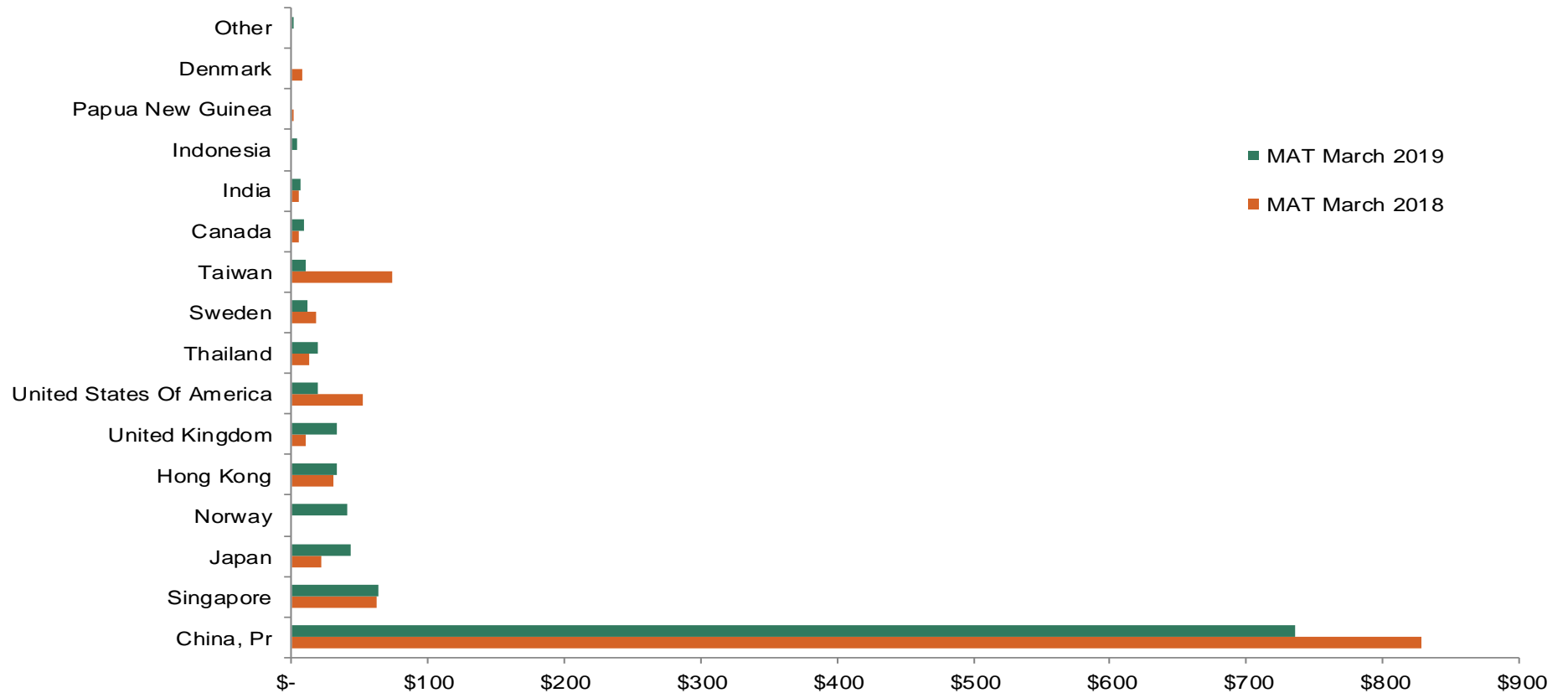
Volume ('000 litres)



	China, Pr	Singapore	Japan	Norway	Hong Kong	United Kingdom	United States Of America	Thailand	Sweden	Taiwan	Canada	India	Indonesia	Papua New Guinea	Denmark	Other
■ MAT March 2019	43	2	2	2	1	1	1	1	1	0	0	0	0	-	-	0
■ MAT March 2018	64	2	1	-	1	0	5	0	2	2	0	0	-	0	0	-

Bottled exports by top 15 destinations

Value ('000 AUD)



	China, Pr	Singapore	Japan	Norway	Hong Kong	United Kingdom	United States Of America	Thailand	Sweden	Taiwan	Canada	India	Indonesia	Papua New Guinea	Denmark	Other
■ MAT March 2019	\$736	\$64	\$43	\$41	\$33	\$33	\$19	\$19	\$12	\$11	\$9	\$7	\$3	\$-	\$-	\$0
■ MAT March 2018	\$828	\$62	\$21	\$-	\$31	\$10	\$52	\$13	\$18	\$74	\$5	\$6	\$-	\$1	\$8	\$-

Bottled exports by top 15 destinations

Average Value (AUD per litre)

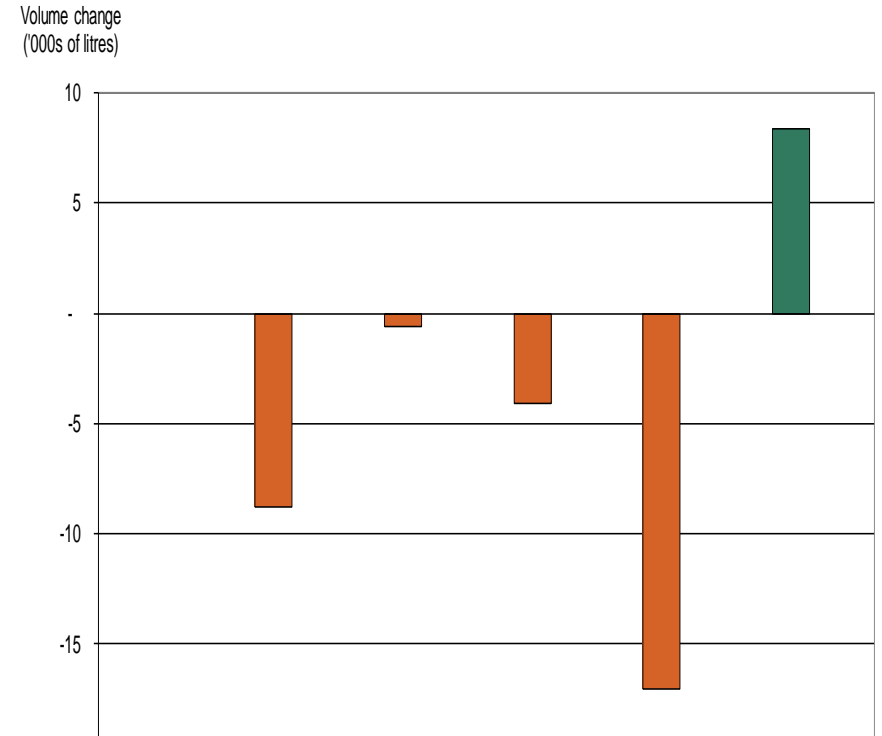
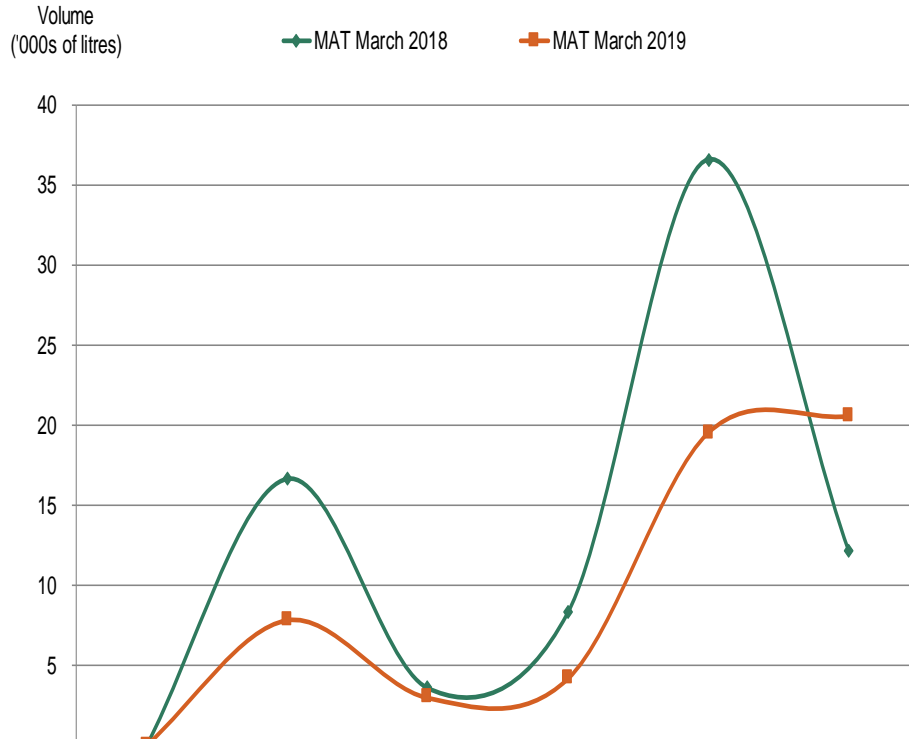


	China, Pr	Singapore	Japan	Norway	Hong Kong	United Kingdom	United States Of America	Thailand	Sweden	Taiwan	Canada	India	Indonesia	Papua New Guinea	Denmark	Other
MAT March 2019	\$16.97	\$27.25	\$28.34	\$26.67	\$30.60	\$29.16	\$23.27	\$18.89	\$9.17	\$43.63	\$38.53	\$30.56	\$13.01	\$-	\$-	\$48.27
MAT March 2018	\$12.99	\$28.60	\$23.19	\$-	\$30.51	\$22.68	\$11.11	\$67.65	\$9.59	\$45.93	\$54.62	\$29.17	\$-	\$54.72	\$29.88	\$-

Bottled exports by price point

Volume ('000 litres)

Change in volume



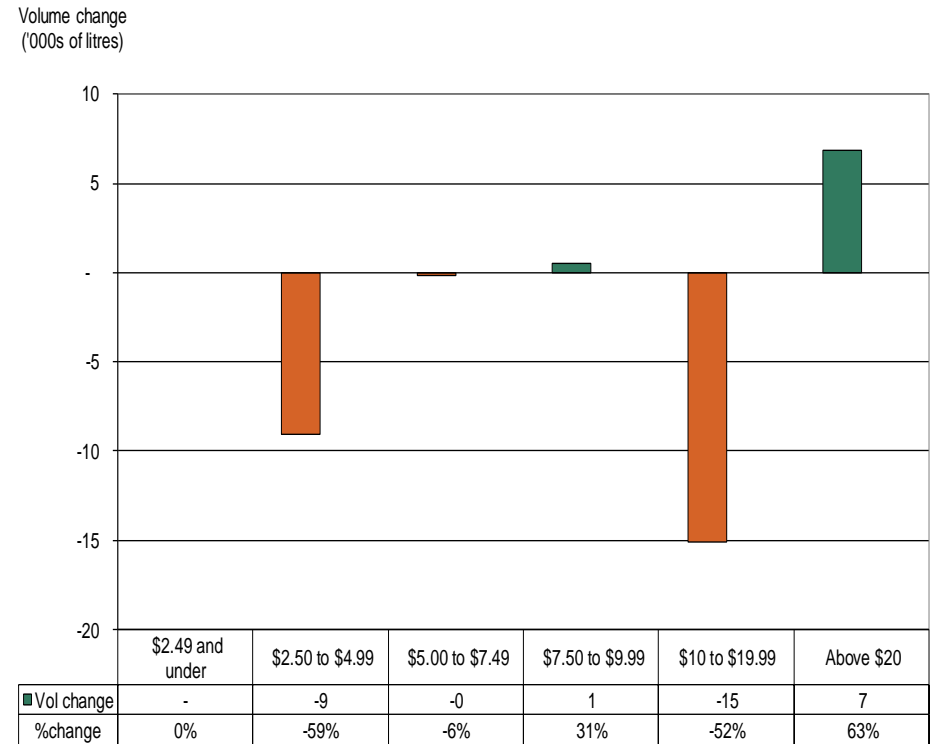
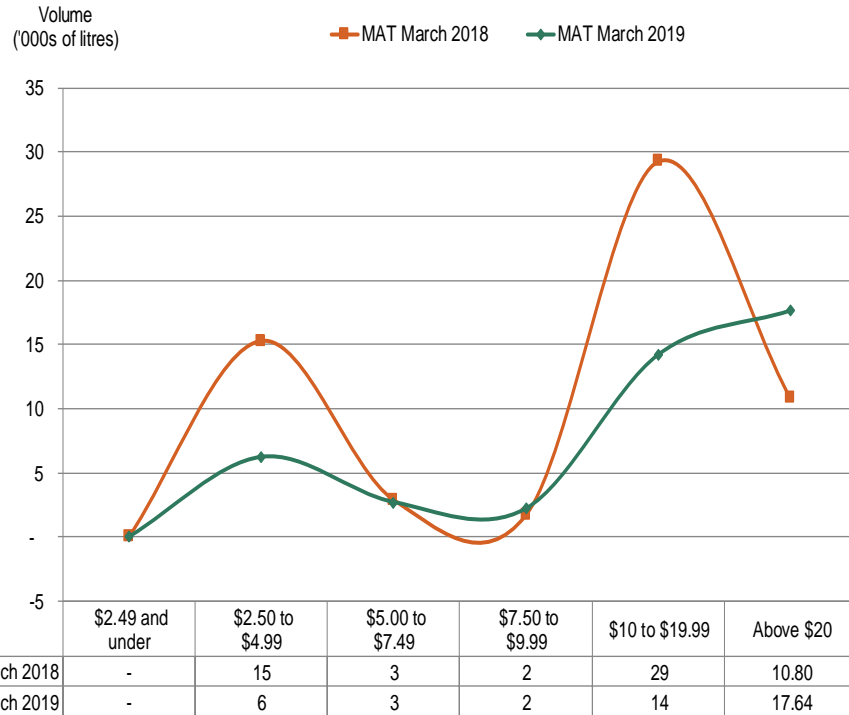
	\$2.49 and under	\$2.50 to \$4.99	\$5.00 to \$7.49	\$7.50 to \$9.99	\$10 to \$19.99	Above \$20
MAT March 2018	-	17	4	8	37	12.15
MAT March 2019	-	8	3	4	20	21

	\$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	-	-9	-1	-4	-17	8
%change	0%	-53%	-17%	-50%	-47%	69%

Bottled red wine exports by price point

Volume ('000 litres)

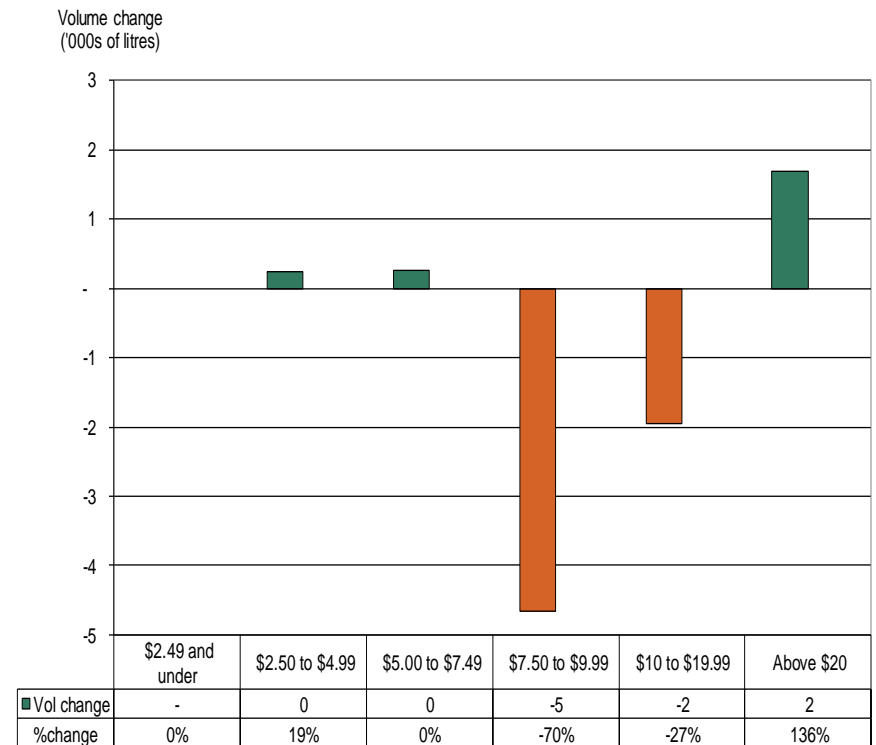
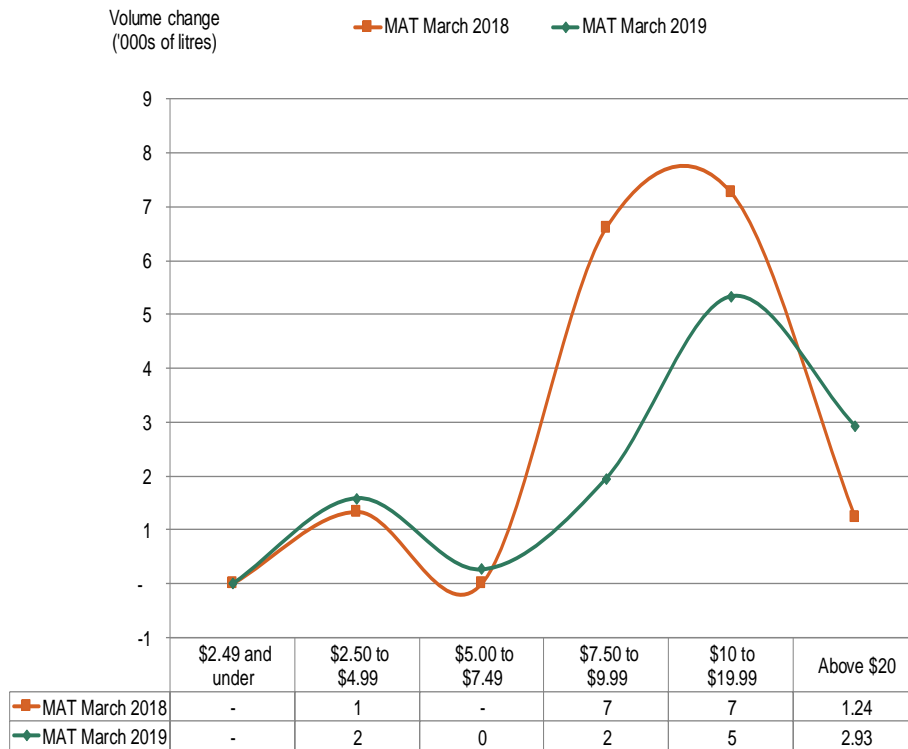
Change in volume



Bottled white wine exports by price point

Volume ('000 litres)

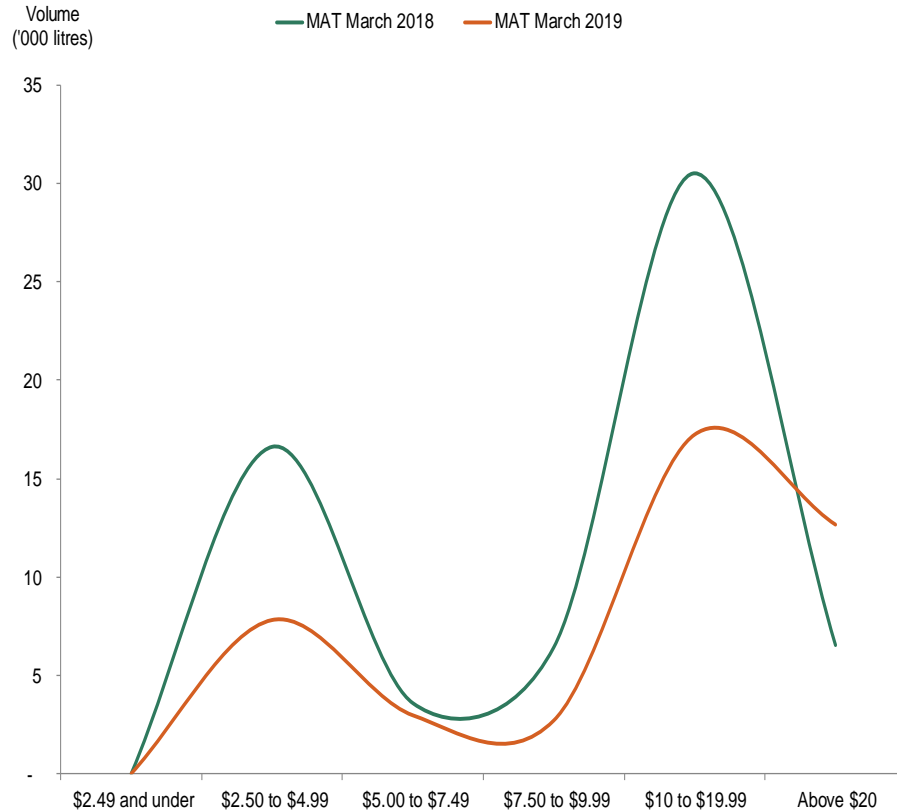
Change in volume



Bottled wine exports to China, Pr

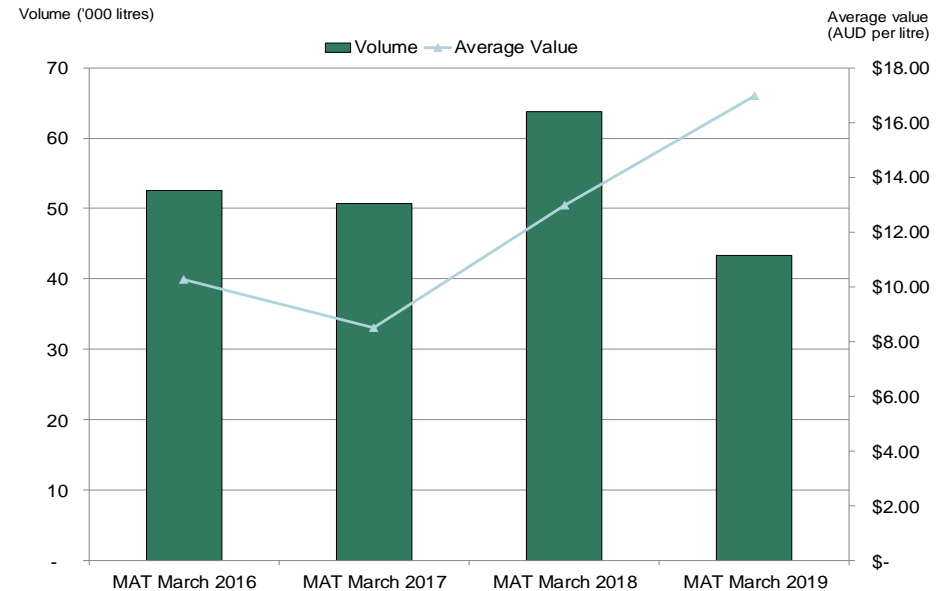
Overview

Total wine by price point



		MAT March 2018	MAT March 2019	Change
Red wine	Volume (litres)	53,825	35,492	-34%
	Value (AUD)	\$727,218	\$620,004	-15%
	Average value	\$13.51	\$17.47	29%
White wine	Volume (litres)	9,207	7,871	-15%
	Value (AUD)	\$96,993	\$116,052	20%
	Average value	\$10.53	\$14.75	40%
Total wine	Volume (litres)	63,734	43,362	-32%
	Value (AUD)	\$827,917	\$736,056	-11%
	Average value	\$12.99	\$16.97	31%

Total volume and average value

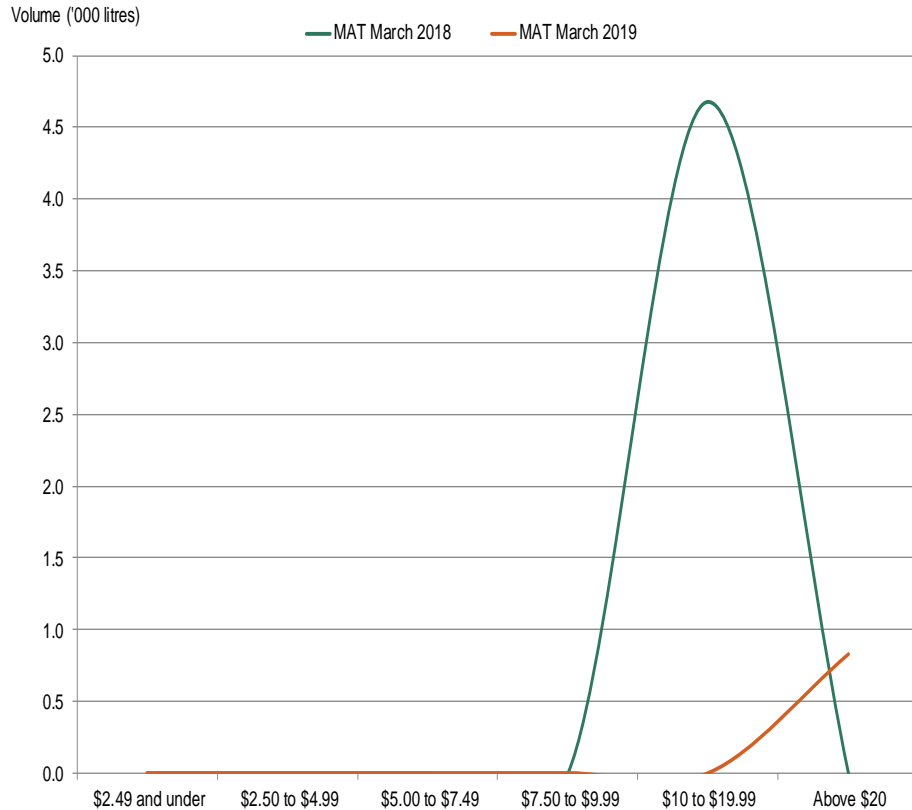


Bottled wine exports to United States Of America

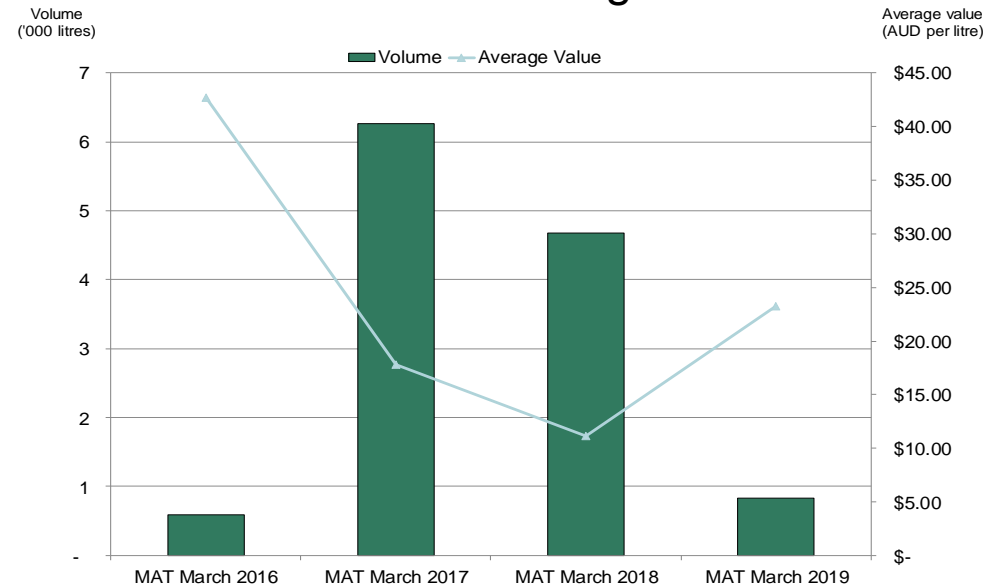
Overview

		MAT March 2018	MAT March 2019	Change
Red wine	Volume (litres)	936	828	-12%
	Value (AUD)	\$10,400	\$19,267	85%
	Average value	\$11.11	\$23.27	109%
White wine	Volume (litres)	3,744	-	-100%
	Value (AUD)	\$41,600	\$0	-100%
	Average value	\$11.11		
Total wine	Volume (litres)	4,680	828	-82%
	Value (AUD)	\$52,000	\$19,267	-63%
	Average value	\$11.11	\$23.27	109%

Total wine by price point



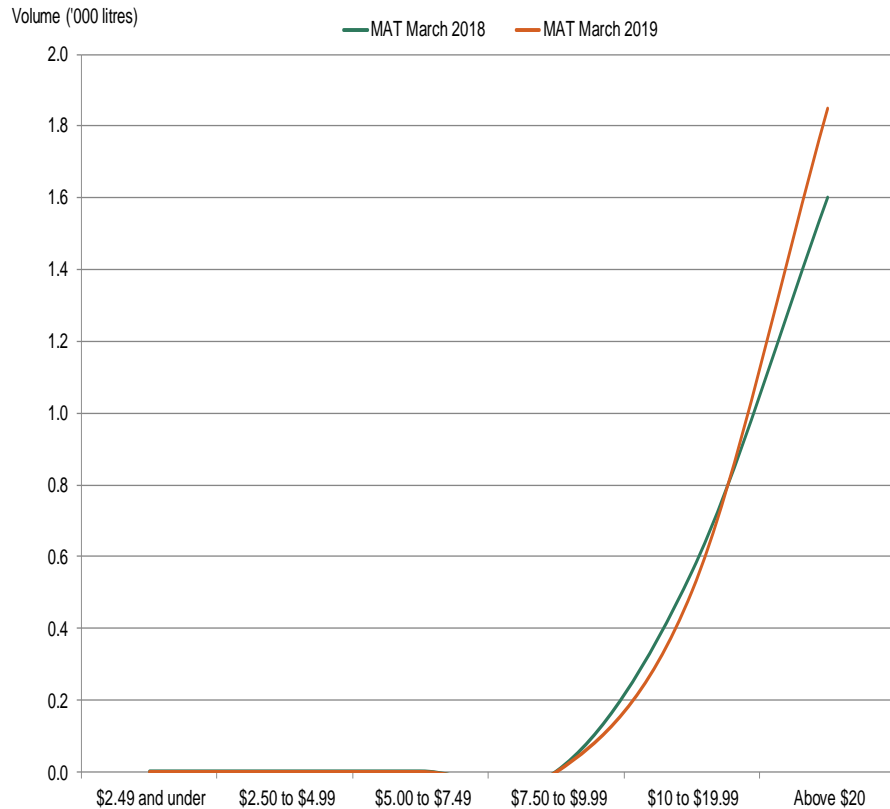
Total volume and average value



Bottled wine exports to Singapore

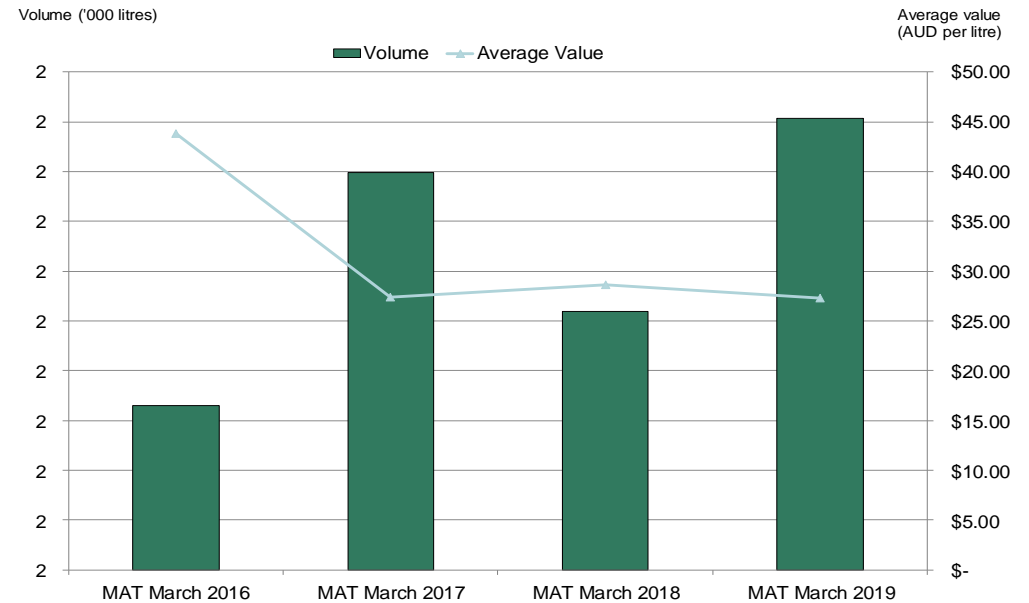
Overview

Total wine by price point



		MAT March 2018	MAT March 2019	Change
Red wine	Volume (litres)	1,175	1,778	51%
	Value (AUD)	\$32,544	\$47,634	46%
	Average value	\$27.71	\$26.80	-3%
White wine	Volume (litres)	878	576	-34%
	Value (AUD)	\$27,082	\$16,510	-39%
	Average value	\$30.86	\$28.66	-7%
Total wine	Volume (litres)	2,160	2,354	9%
	Value (AUD)	\$61,786	\$64,145	4%
	Average value	\$28.60	\$27.25	-5%

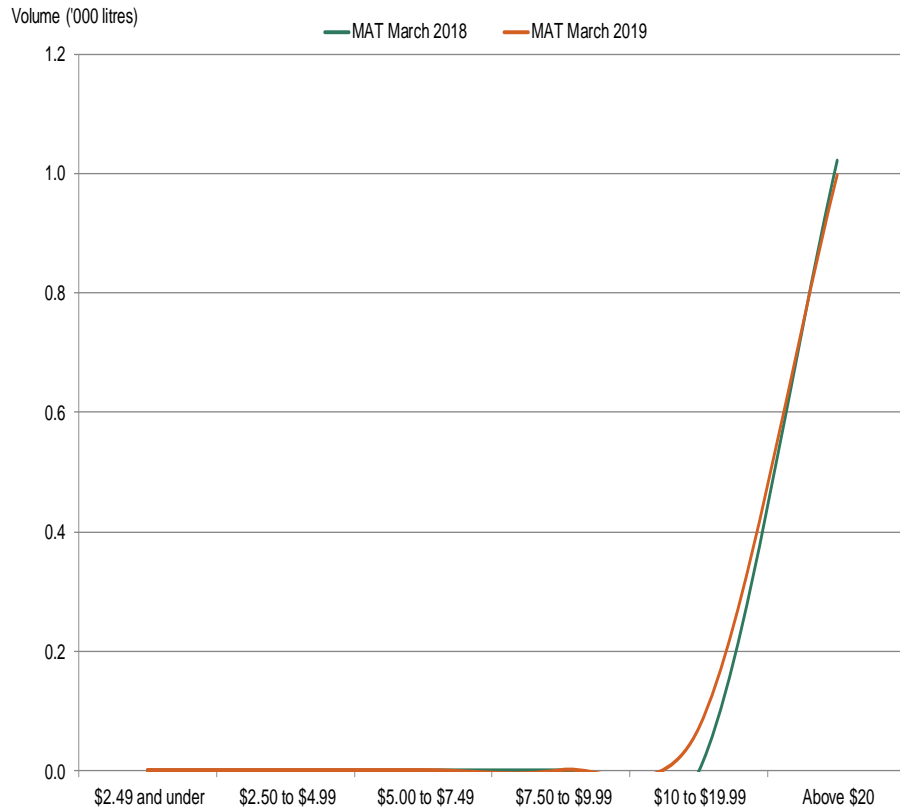
Total volume and average value



Bottled wine exports to Hong Kong

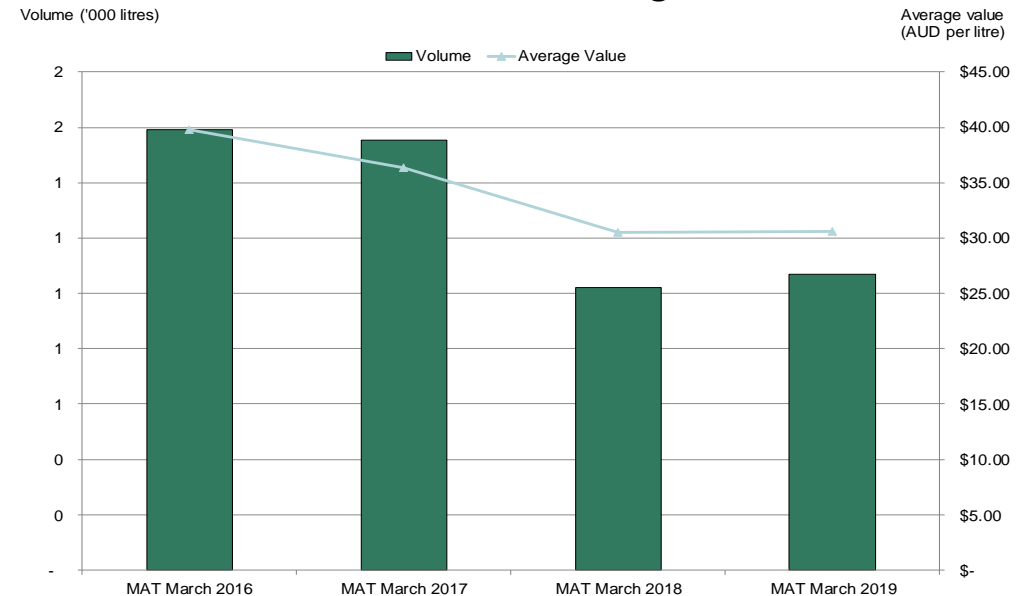
Overview

Total wine by price point



		MAT March 2018	MAT March 2019	Change
Red wine	Volume (litres)	986	467	-53%
	Value (AUD)	\$29,651	\$16,094	-46%
	Average value	\$30.09	\$34.50	15%
White wine	Volume (litres)	36	603	1575%
	Value (AUD)	\$1,520	\$16,634	994%
	Average value	\$42.22	\$27.59	-35%
Total wine	Volume (litres)	1,022	1,070	5%
	Value (AUD)	\$31,171	\$32,728	5%
	Average value	\$30.51	\$30.60	0%

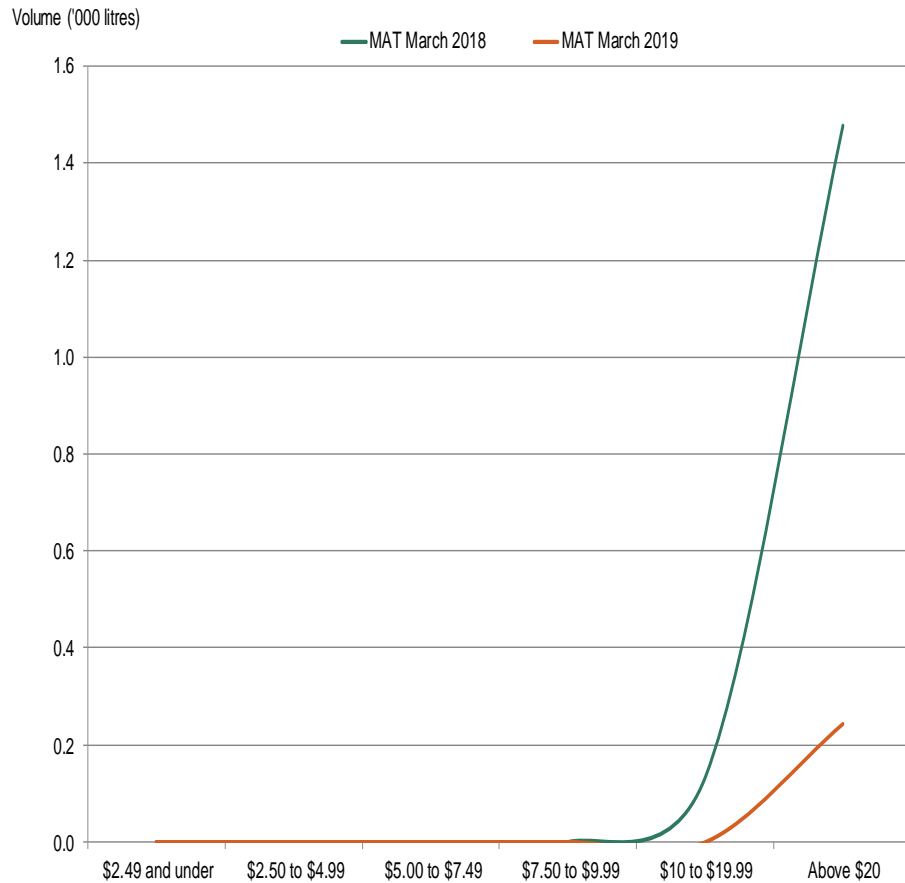
Total volume and average value



Bottled wine exports to Taiwan

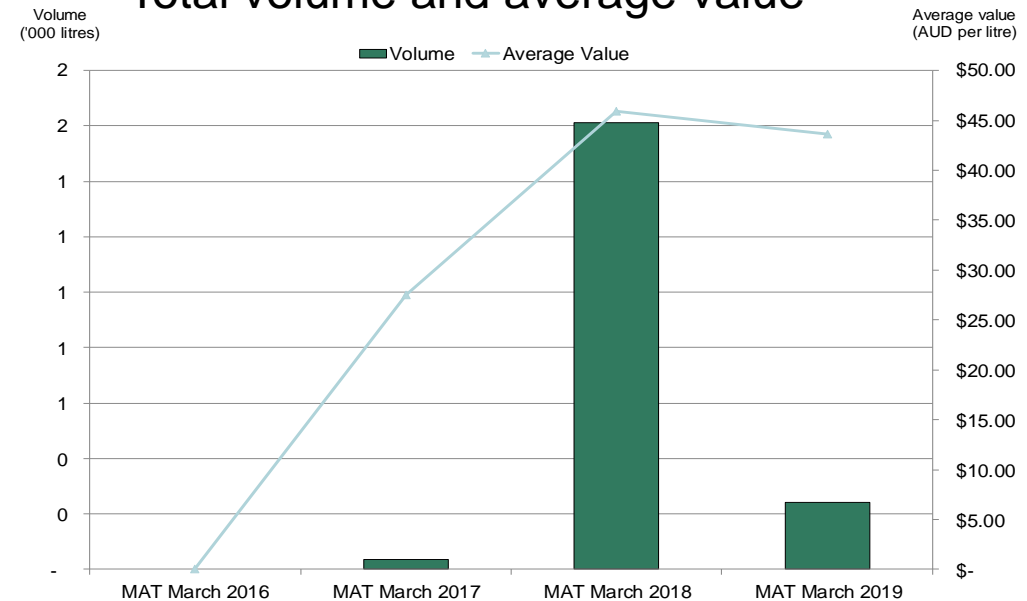
Overview

Total wine by price point



		MAT March 2018	MAT March 2019	Change
Red wine	Volume (litres)	1,404	207	-85%
	Value (AUD)	\$69,609	\$9,308	-87%
	Average value	\$49.58	\$44.97	-9%
White wine	Volume (litres)	207	36	-83%
	Value (AUD)	\$4,385	\$1,294	-70%
	Average value	\$21.18	\$35.94	70%
Total wine	Volume (litres)	1,611	243	-85%
	Value (AUD)	\$73,994	\$10,602	-86%
	Average value	\$45.93	\$43.63	-5%

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.

Flacons: 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.