

Wine
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Wine

Victoria
Export Report
MAT March 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 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 March 2019		Change %	
	Volume (million L)	Value (million AUD)	Volume	Value
SA	394	\$1,729	-3%	7%
NSW	236	\$524	-2%	2%
VIC	173	\$451	-7%	1%
WA	9.6	\$65	20%	6%
TAS	0.9	\$7.8	9%	11%
QLD	0.2	\$1.7	34%	83%
ACT	0.0	\$0.2	-50%	-35%
Total	814	\$2,779	-3%	5%

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
Victoria	3,031	-21%	\$19,816	-16%	\$6.54	5%
Yarra Valley	1,371	-2%	\$21,937	11%	\$16.00	13%
Heathcote	811	5%	\$12,251	10%	\$15.11	4%
Central Victoria	735	-3%	\$6,753	8%	\$9.19	12%
North West Victoria	688	14%	\$3,108	15%	\$4.52	2%
Goulburn Valley	402	44%	\$4,517	73%	\$11.25	21%
Murray Darling - Vic	396	-2%	\$1,787	0%	\$4.51	2%
King Valley	329	-16%	\$2,554	-8%	\$7.75	9%
Rutherglen	326	55%	\$3,769	94%	\$11.54	25%
Nagambie Lakes	252	10%	\$3,398	21%	\$13.50	10%
Pyrenees	240	-2%	\$3,613	-8%	\$15.05	-6%
Mornington Peninsula	132	19%	\$2,642	12%	\$20.06	-6%
Grampians	110	41%	\$1,366	40%	\$12.44	-1%
Bendigo	93	46%	\$870	26%	\$9.39	-14%
Geelong	55	-29%	\$1,029	-9%	\$18.71	28%
Yenda	54	-3%	\$391	-3%	\$7.27	0%
Strathbogie Ranges	47	6%	\$522	-25%	\$11.19	-30%
Great Western	38	27%	\$637	45%	\$16.57	15%
North East Victoria	20	569%	\$226	1058%	\$11.13	73%
Port Phillip	18	10%	\$321	33%	\$17.53	21%
Gippsland	15	-13%	\$480	-24%	\$31.22	-13%
Macedon Ranges	15	48%	\$404	53%	\$27.15	3%
Beechworth	12	-48%	\$446	-43%	\$36.42	10%
Swan Hill -Vic	10	8%	\$43	-16%	\$4.47	-22%
Glenrowan	6	-61%	\$141	0%	\$25.45	158%
Mansfield	5	303%	\$123	428%	\$23.49	31%
Henty	5	-69%	\$90	-55%	\$18.53	44%

GI claims over time

	Volume		Value		Average Value AUD per	
	'000 litres	Change	'000 AUD	Change	litre	Change
MAT March 2011	7,929	-2%	\$55,836	1%	\$7.04	3%
MAT March 2012	6,987	-12%	\$51,299	-8%	\$7.34	4%
MAT March 2013	6,769	-3%	\$54,351	6%	\$8.03	9%
MAT March 2014	5,560	-18%	\$47,451	-13%	\$8.53	6%
MAT March 2015	5,568	0%	\$49,184	4%	\$8.83	3%
MAT March 2016	6,566	18%	\$58,629	19%	\$8.93	1%
MAT March 2017	8,176	25%	\$70,979	21%	\$8.68	-3%
MAT March 2018	9,694	19%	\$88,677	25%	\$9.15	5%
MAT March 2019	9,229	-5%	\$93,405	5%	\$10.12	11%

GI claims by country and year

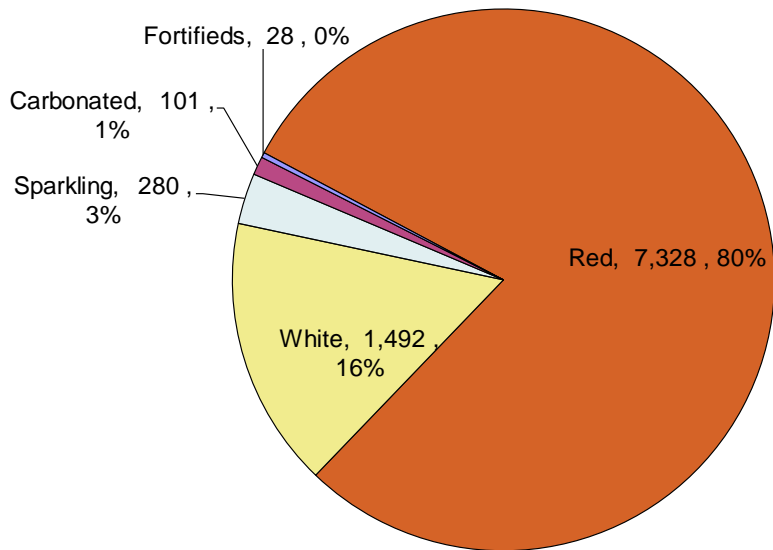
	MAT March									
	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Volume ('000 litres)										
Canada	462	406	478	387	403	708	802	900	1,107	1,154
China, Pr	1,095	1,465	1,719	2,204	1,873	1,860	2,840	4,046	4,781	4,411
Denmark	299	234	138	164	108	65	33	30	46	27
Hong Kong	188	216	192	199	160	128	127	74	183	161
Ireland	415	281	266	142	62	36	14	69	56	89
Japan	239	211	188	209	130	133	139	117	215	272
Malaysia	116	94	107	54	54	67	87	65	48	97
Netherlands	178	163	91	68	27	13	27	82	127	184
New Zealand	437	393	345	441	405	413	355	295	273	360
Ship	71	137	112	88	61	43	65	63	64	52
Singapore	182	180	115	146	207	158	129	117	131	134
Sweden	370	333	263	281	258	53	95	98	105	67
United Arab Emirates	106	85	98	68	83	61	59	82	199	64
United Kingdom	2,463	1,988	1,709	1,230	750	844	758	860	802	969
United States Of America	693	843	548	486	610	549	587	662	918	528
Value ('000 AUD)										
Canada	3,594	3,424	3,949	3,284	3,474	5,805	6,382	6,790	7,340	7,458
China, Pr	10,117	12,563	15,497	21,233	17,604	18,333	25,664	37,519	49,613	54,830
Denmark	1,976	1,342	992	1,158	879	572	360	384	403	253
Hong Kong	1,918	2,095	2,021	2,263	2,007	1,555	1,784	1,488	2,808	2,290
Ireland	1,997	1,388	1,040	686	317	688	128	411	346	494
Japan	2,056	1,965	1,716	1,979	1,308	1,174	1,593	1,179	1,773	2,299
Malaysia	621	637	905	480	451	518	622	526	329	592
Netherlands	957	895	523	348	258	120	263	416	575	1,068
New Zealand	2,357	2,080	1,817	2,234	2,198	2,629	2,270	2,159	1,974	2,541
Ship	803	1,410	972	869	754	553	886	931	882	686
Singapore	2,253	2,048	1,421	1,493	2,273	1,838	1,564	1,628	1,691	1,849
Sweden	2,898	2,565	1,921	2,031	1,899	454	701	451	707	626
United Arab Emirates	982	799	991	684	1,148	889	907	1,235	2,322	1,126
United Kingdom	11,399	9,661	8,903	7,087	5,007	5,630	5,893	6,203	6,204	7,843
United States Of America	5,303	5,839	3,655	3,667	4,373	4,087	4,711	4,563	6,326	3,977

Bottled exports by price point and destination

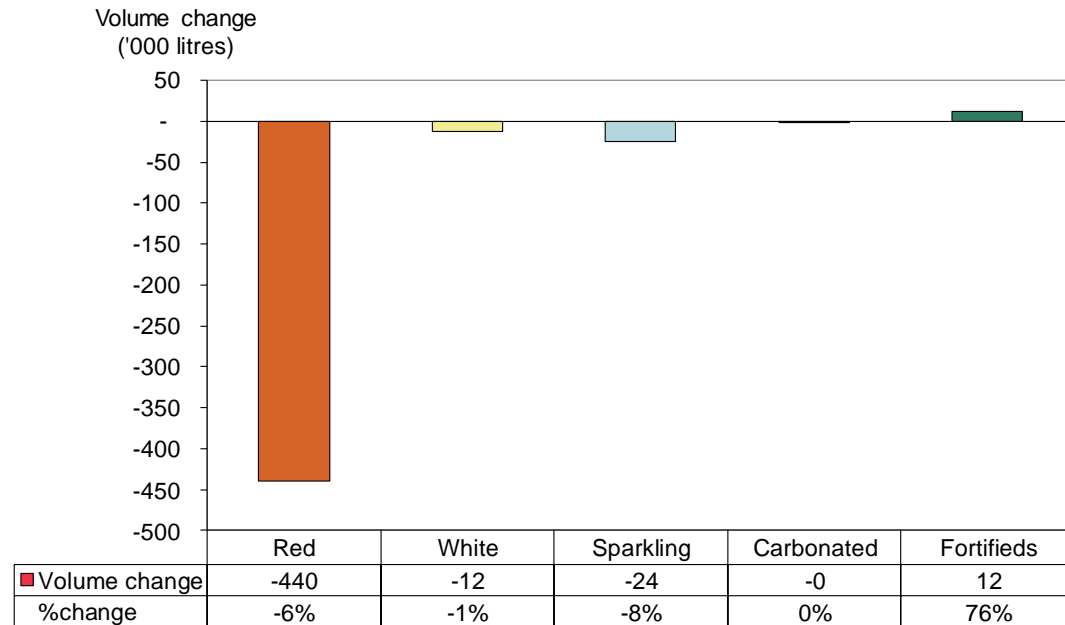
	\$2.49 and under		\$2.50 to \$4.99		\$5.00 to \$7.49		\$7.50 to \$9.99		\$10 to \$19.99		Above \$20		Total	
	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)
China, Pr	13.2	-68%	757.9	-26%	791.3	-36%	709.8	21%	1,451.0	6%	687.7	31%	4,410.9	-8%
United States Of America	0.8	na	136.2	-58%	241.1	-35%	67.7	-12%	69.5	-44%	12.4	-27%	527.6	-42%
Japan	-	na	102.3	16%	55.5	43%	60.6	76%	38.5	-9%	15.0	36%	271.9	27%
Hong Kong	0.3	na	24.2	-33%	57.2	8%	13.3	66%	36.2	-4%	29.8	-38%	161.0	-12%
Canada	-	-100%	281.3	24%	712.5	6%	75.8	-48%	78.5	34%	5.9	52%	1,154.0	4%
Malaysia	-	na	53.6	164%	21.9	56%	13.1	77%	7.0	43%	1.4	7%	97.0	102%
New Zealand	0.1	-87%	30.2	64%	203.6	21%	106.5	60%	18.0	3%	1.5	-22%	360.0	32%
Singapore	1.4	30%	10.3	6%	23.7	38%	35.3	3%	41.0	-21%	22.5	30%	134.3	2%
United Kingdom	1.7	-87%	385.5	48%	213.8	-24%	133.2	60%	199.0	52%	36.1	11%	969.4	21%
Netherlands	-	na	94.5	-15%	73.7	2398%	6.6	24%	8.8	24%	0.7	154%	184.4	46%
Ireland	-	na	51.0	107%	22.9	46%	2.0	-87%	13.1	na	0.2	-66%	89.2	58%
Belgium	-	na	0.2	-86%	20.4	-37%	28.8	56%	29.3	-19%	0.1	-58%	78.8	-11%
Sweden	-	na	21.4	-60%	18.0	-41%	2.2	-37%	20.8	43%	4.8	100%	67.3	-36%
Thailand	-	na	25.9	-19%	20.7	226%	15.1	0%	6.5	12%	3.6	44%	71.8	17%
United Arab Emirates	-	na	1.0	440%	8.1	-95%	11.0	161%	34.3	37%	9.6	-51%	64.0	-68%
Other	0.0	-100%	234.1	26%	111.2	-12%	52.2	-18%	161.2	-4%	28.9	-14%	587.7	-2%
Total	17.5	-78%	2,209.7	-9%	2,595.7	-19%	1,333.3	14%	2,212.8	6%	860.3	20%	9,229.3	-5%

Bottled exports by colour/wine style

Volume ('000 litres)

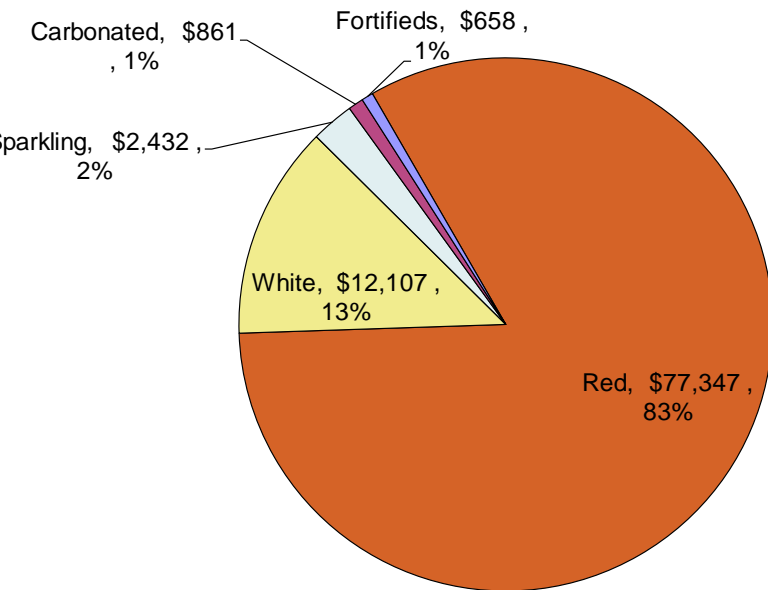


Change in volume

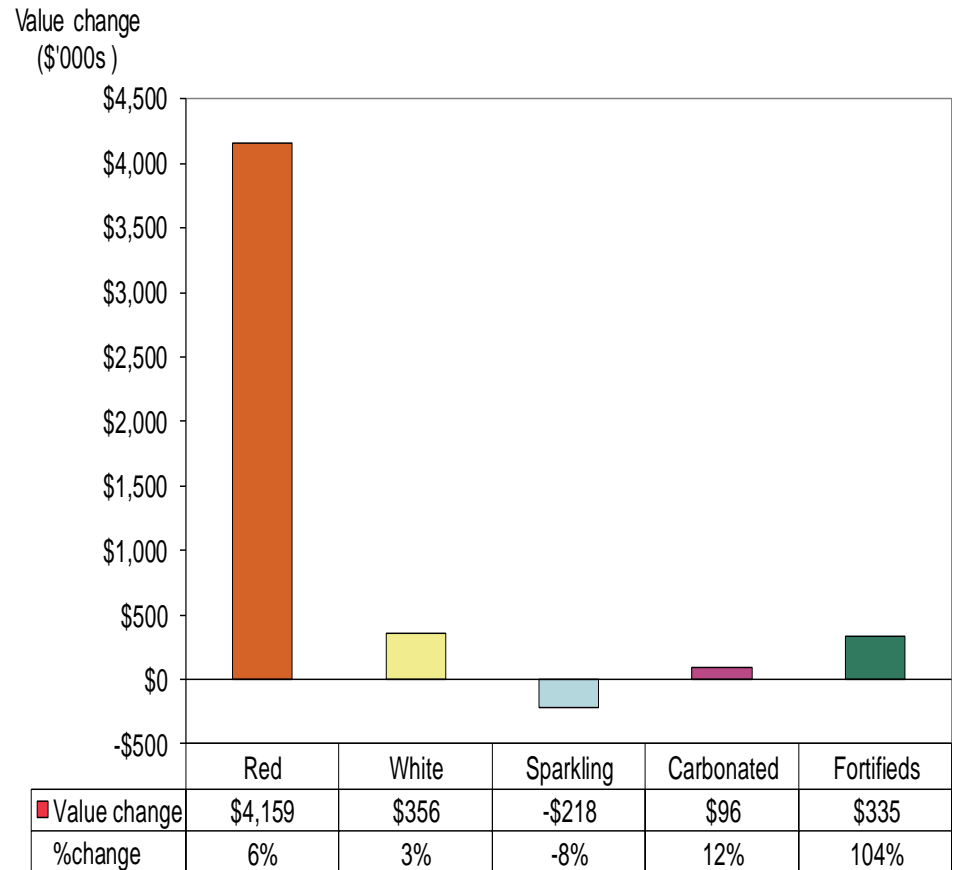


Bottled exports by colour/wine style

Value ('000 AUD)

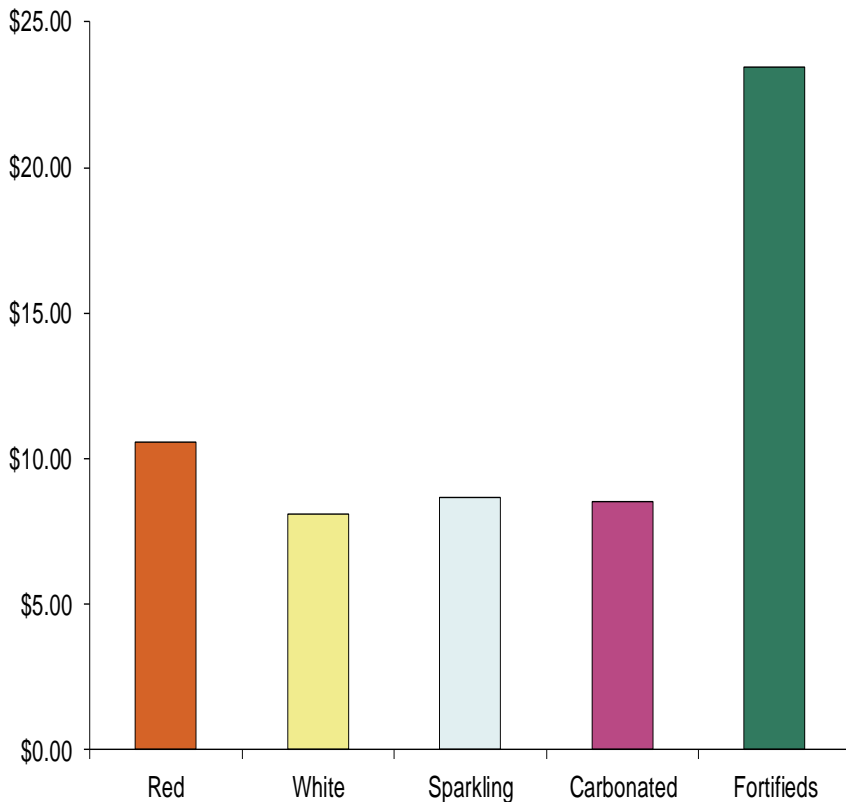


Change in value

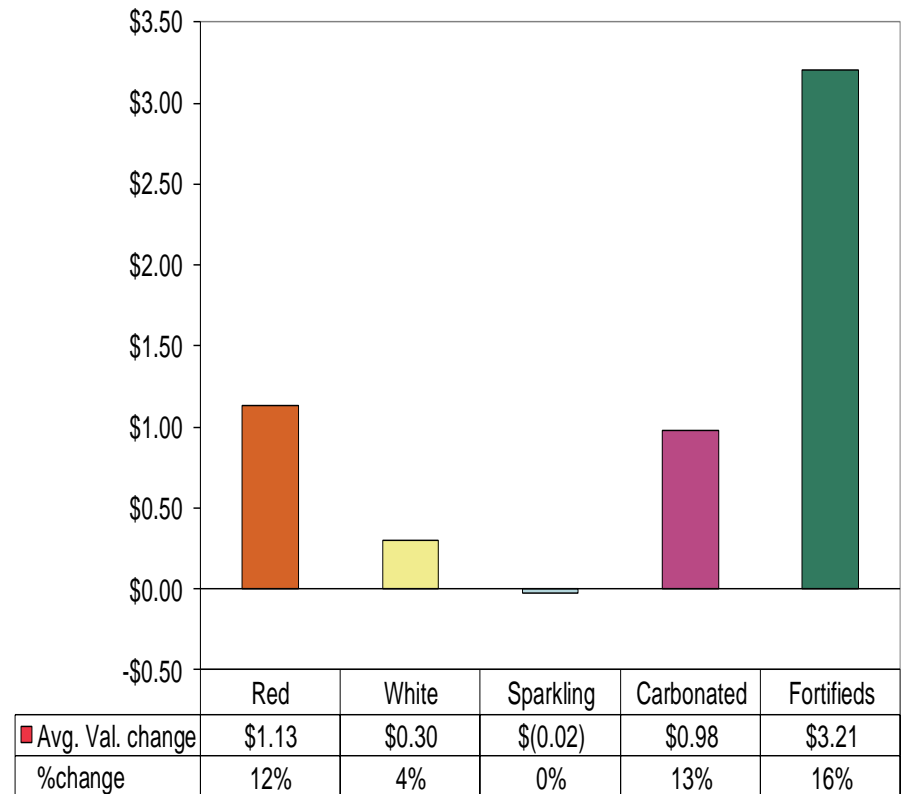


Bottled exports by colour/wine style

Average value (AUD per litre)

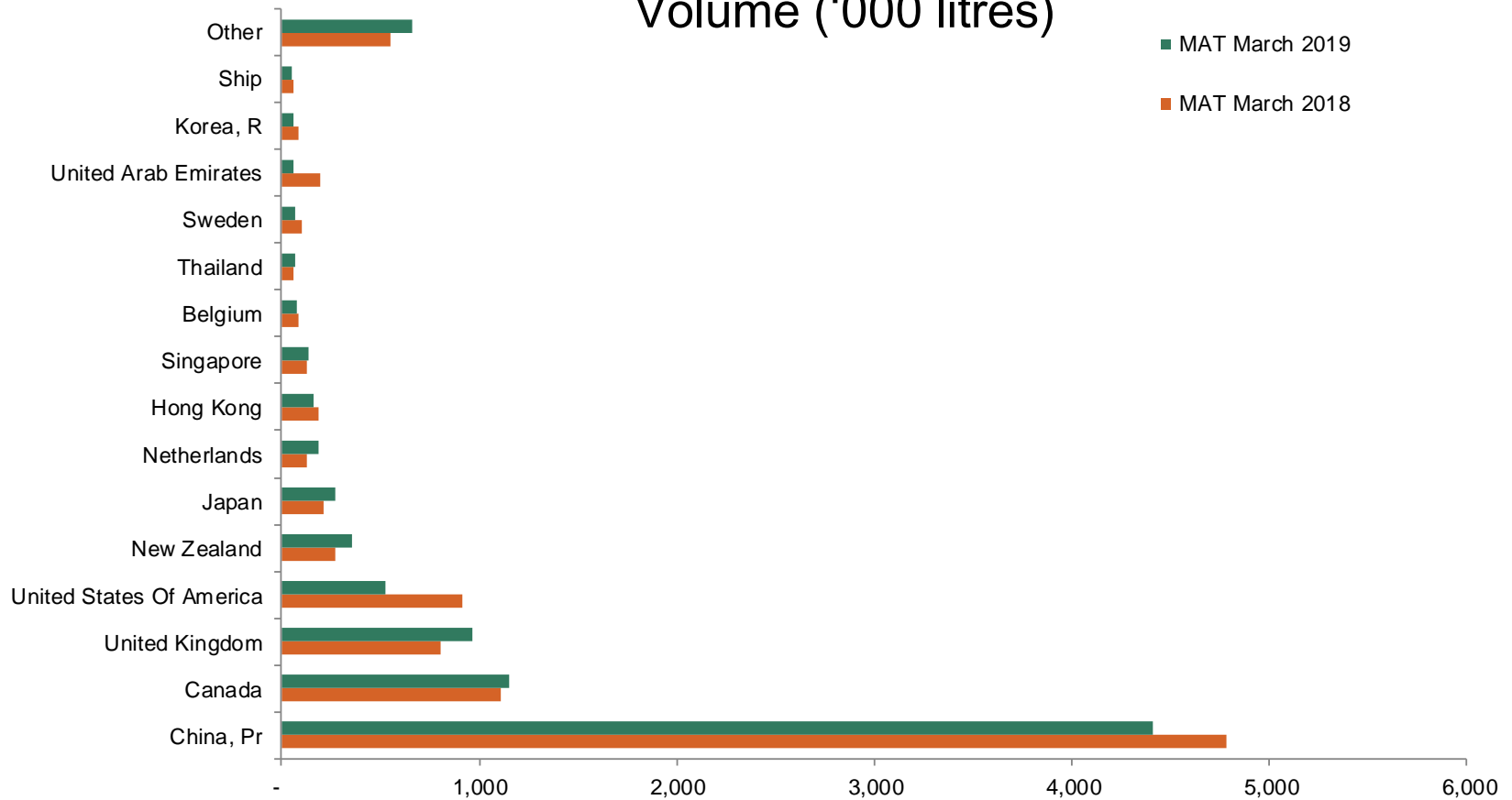


Change in average value



Bottled exports to top 15 destinations

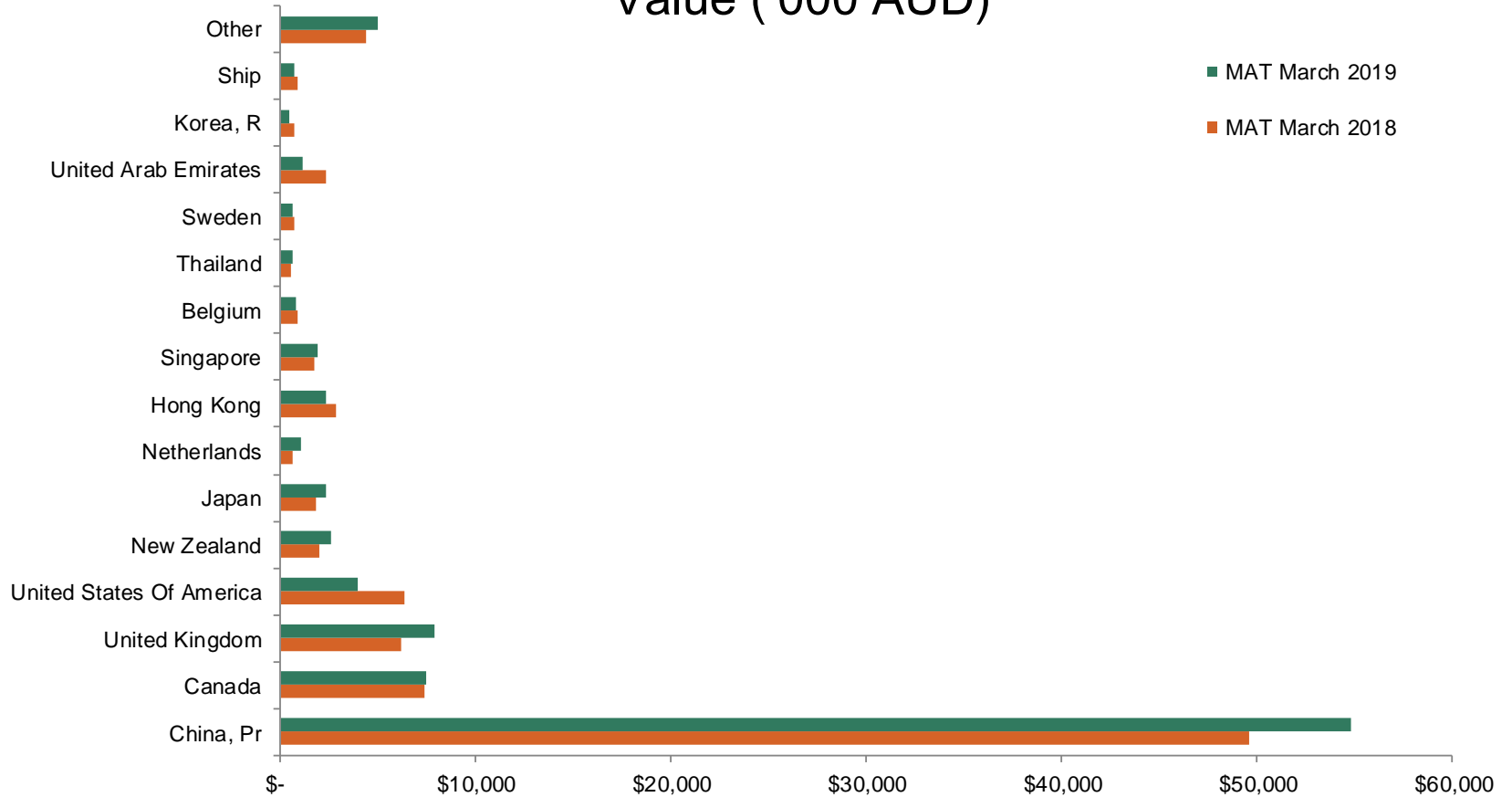
Volume ('000 litres)



	China, Pr	Canada	United Kingdom	United States Of America	New Zealand	Japan	Netherlands	Hong Kong	Singapore	Belgium	Thailand	Sweden	United Arab Emirates	Korea, R	Ship	Other
■ MAT March 2019	4,411	1,154	969	528	360	272	184	161	134	79	72	67	64	59	52	663
■ MAT March 2018	4,781	1,107	802	918	273	215	127	183	131	89	62	105	199	86	64	554

Bottled exports by top 15 destinations

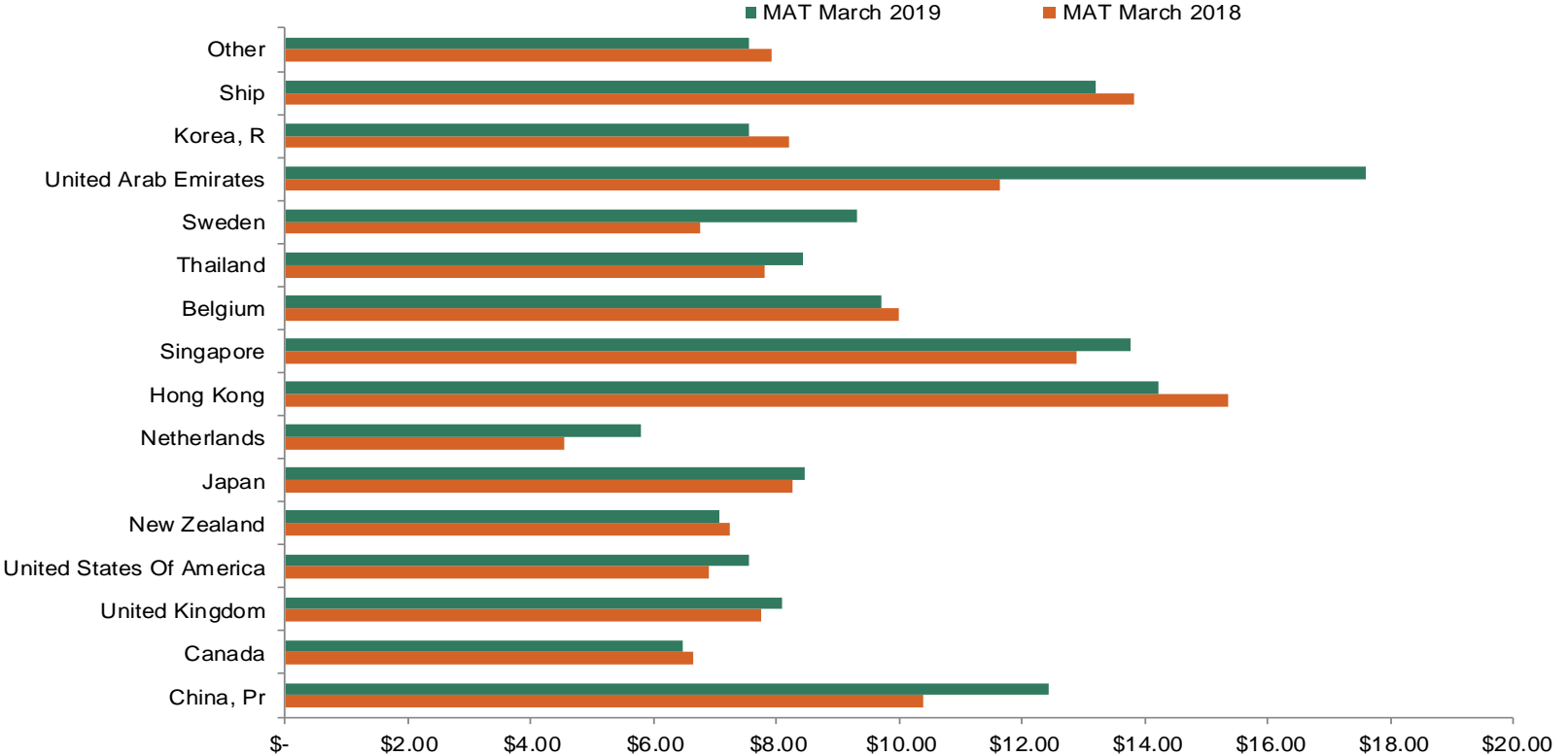
Value ('000 AUD)



	China, Pr	Canada	United Kingdom	United States Of America	New Zealand	Japan	Netherlands	Hong Kong	Singapore	Belgium	Thailand	Sweden	United Arab Emirates	Korea, R	Ship	Other
■ MAT March 2019	\$54,83	\$7,458	\$7,843	\$3,977	\$2,541	\$2,299	\$1,068	\$2,290	\$1,849	\$766	\$606	\$626	\$1,126	\$442	\$686	\$5,000
■ MAT March 2018	\$49,61	\$7,340	\$6,204	\$6,326	\$1,974	\$1,773	\$575	\$2,808	\$1,691	\$887	\$481	\$707	\$2,322	\$709	\$882	\$4,383

Bottled exports by top 15 destinations

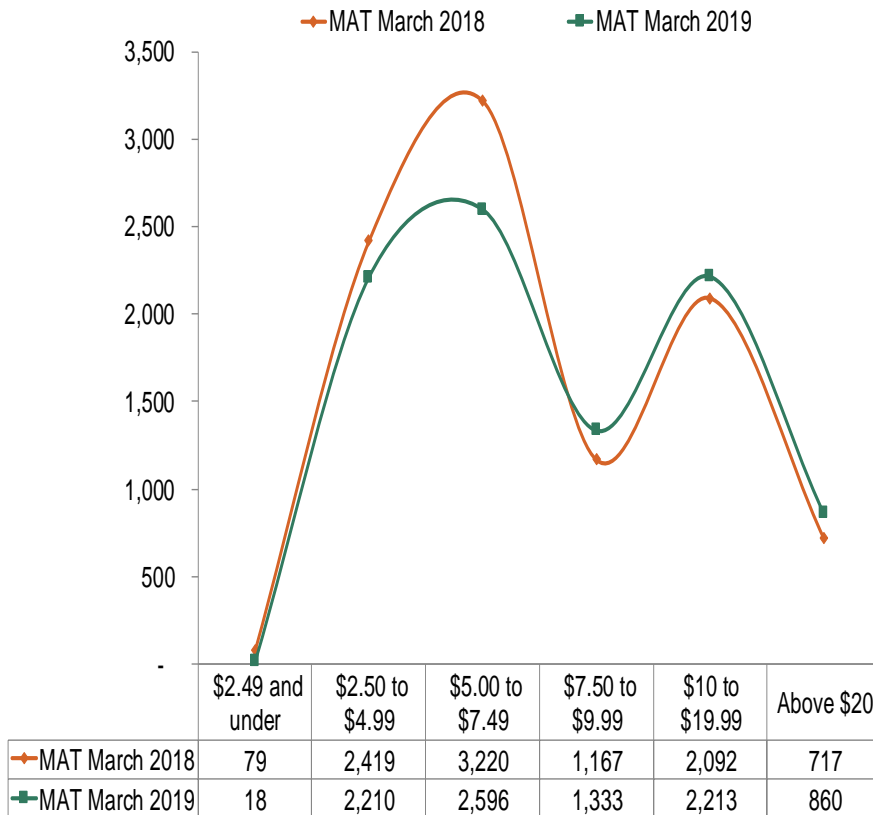
Average value (AUD/litre FOB)



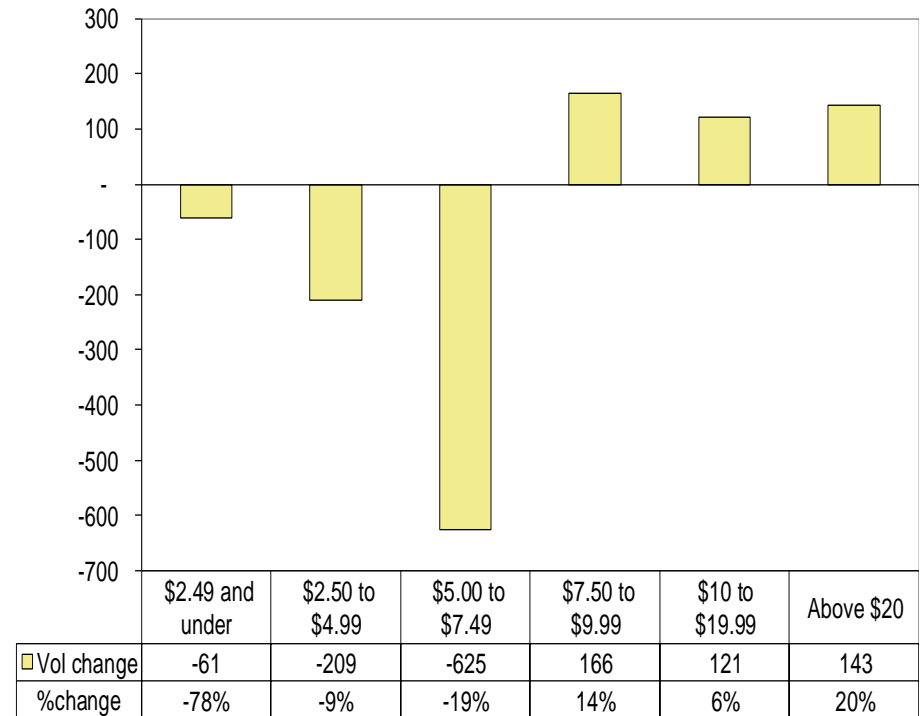
	China, Pr	Canada	United Kingdom	United States Of America	New Zealand	Japan	Netherlands	Hong Kong	Singapore	Belgium	Thailand	Sweden	United Arab Emirates	Korea, R	Ship	Other
■ MAT March 2019	\$12.43	\$6.46	\$8.09	\$7.54	\$7.06	\$8.45	\$5.79	\$14.22	\$13.77	\$9.71	\$8.43	\$9.30	\$17.59	\$7.55	\$13.20	\$7.54
■ MAT March 2018	\$10.38	\$6.63	\$7.74	\$6.90	\$7.23	\$8.26	\$4.54	\$15.35	\$12.88	\$9.98	\$7.81	\$6.76	\$11.64	\$8.21	\$13.82	\$7.91

Bottled exports by price point

Volume ('000 litres)



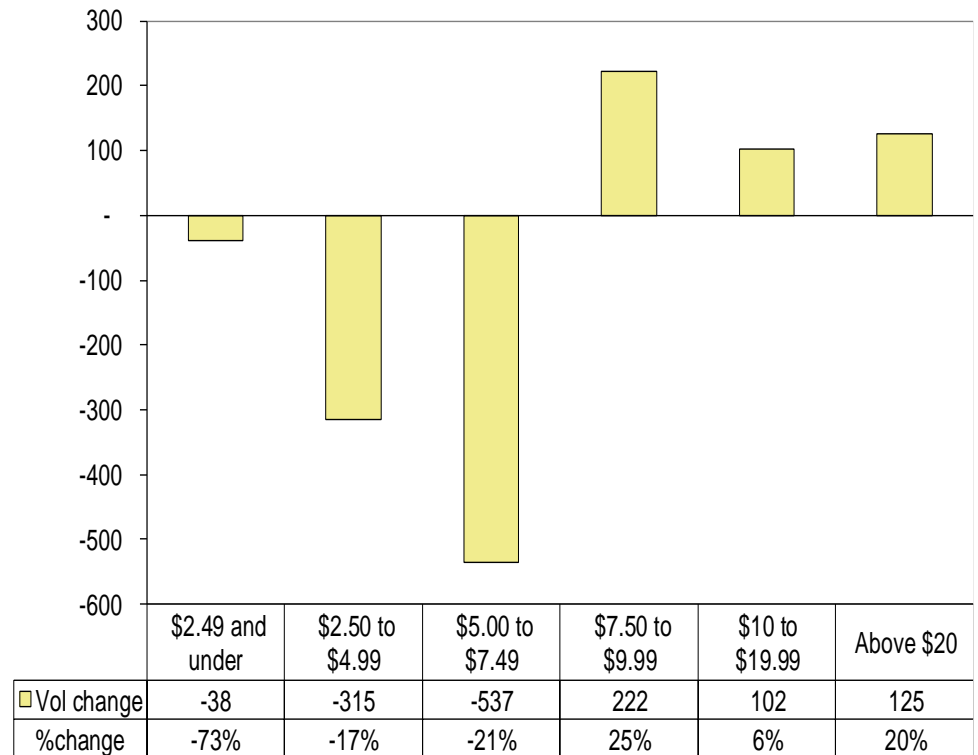
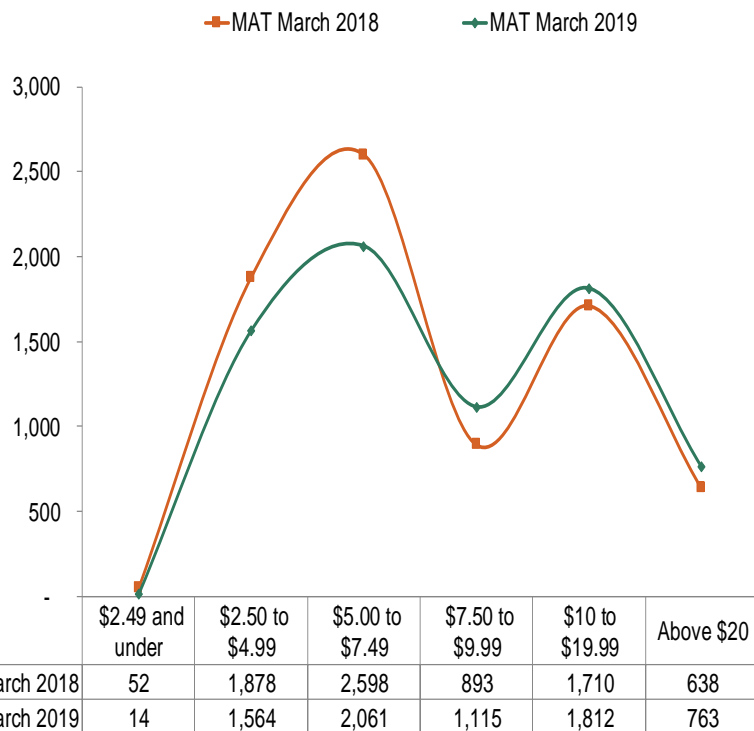
Change in volume



Bottled red wine exports by price point

Volume ('000 litres)

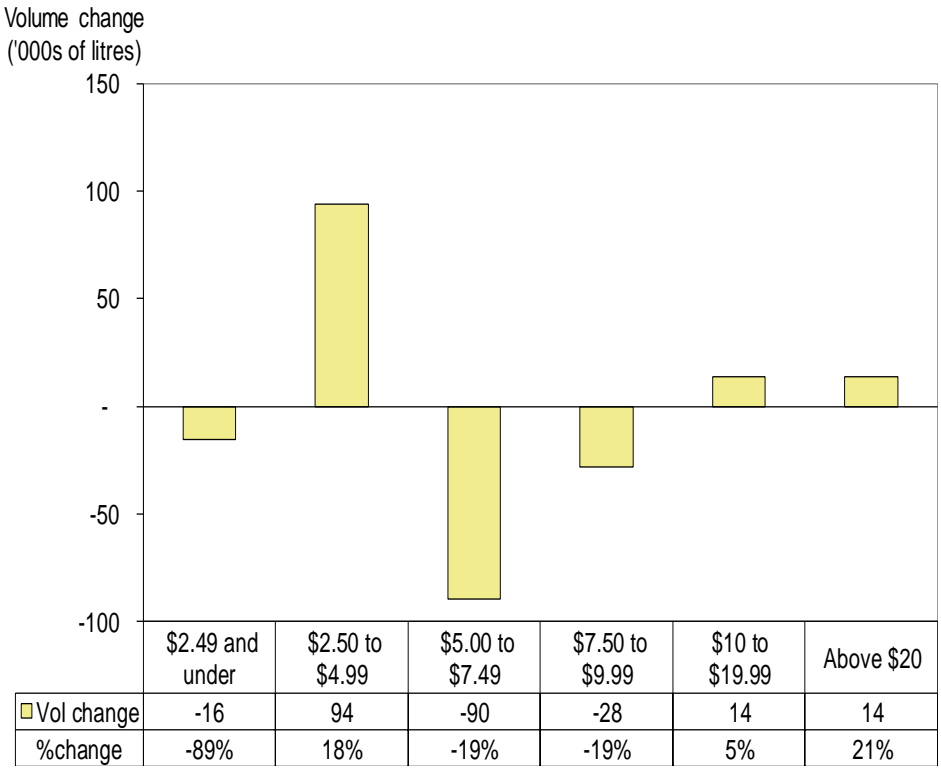
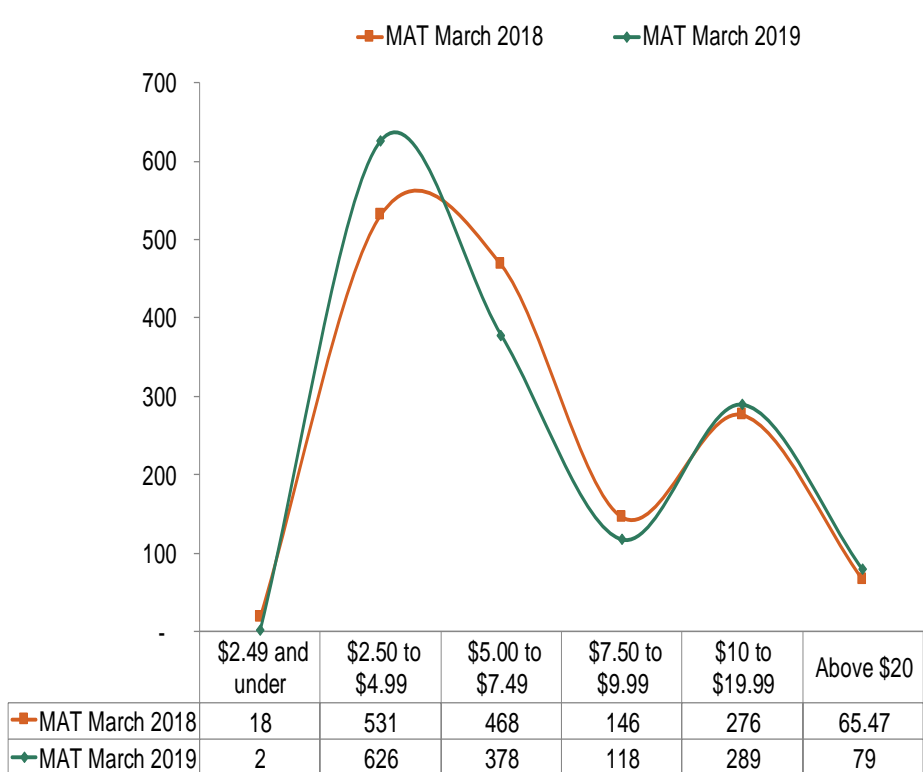
Change in volume



Bottled white wine exports by price point

Volume ('000 litres)

Change in volume

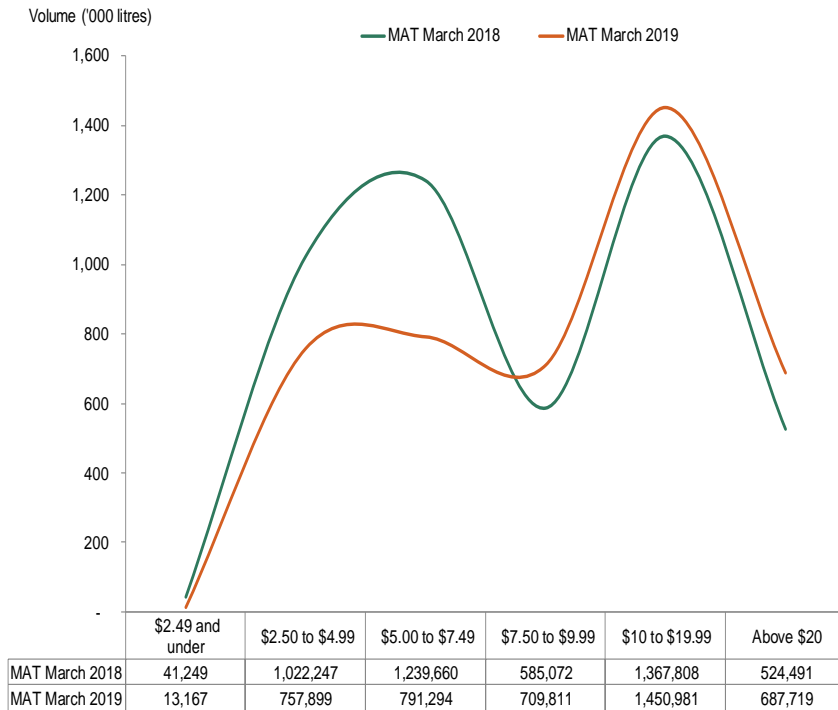


Bottled wine exports to China, Pr

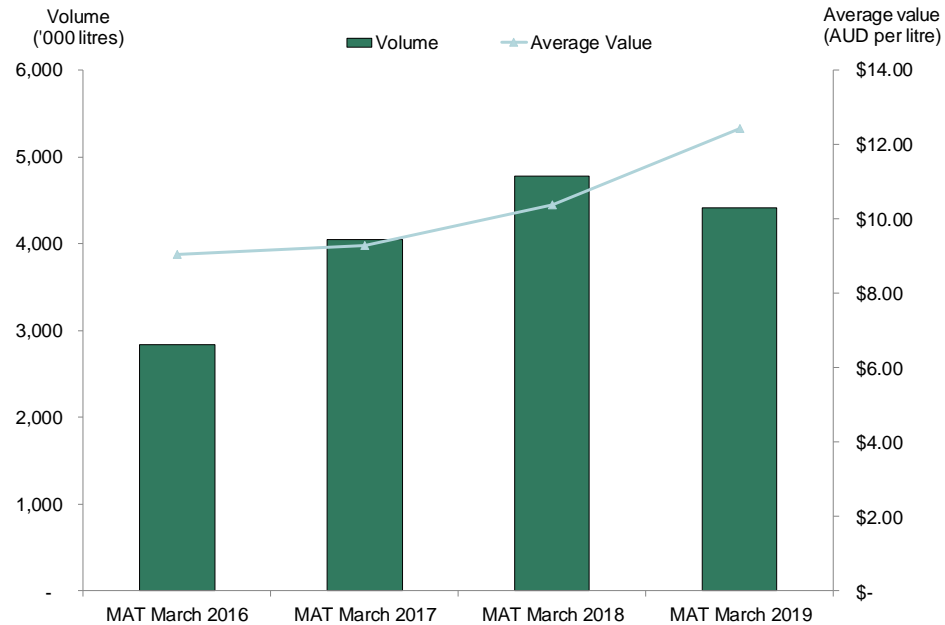
Overview

		MAT March 2018	MAT March 2019	Change
Red wine	Volume (litres)	4,296,809	4,108,926	-4%
	Value (AUD)	\$44,978,400	\$50,924,755	13%
	Average value	\$10.47	\$12.39	18%
White wine	Volume (litres)	249,068	198,083	-20%
	Value (AUD)	\$2,568,573	\$2,652,394	3%
	Average value	\$10.31	\$13.39	30%
Total wine	Volume (litres)	4,780,527	4,410,870	-8%
	Value (AUD)	49,613,227	54,829,603	11%
	Average value	\$10.38	\$12.43	20%

Total wine by price point



Total volume and average value



Bottled wine exports to United Kingdom

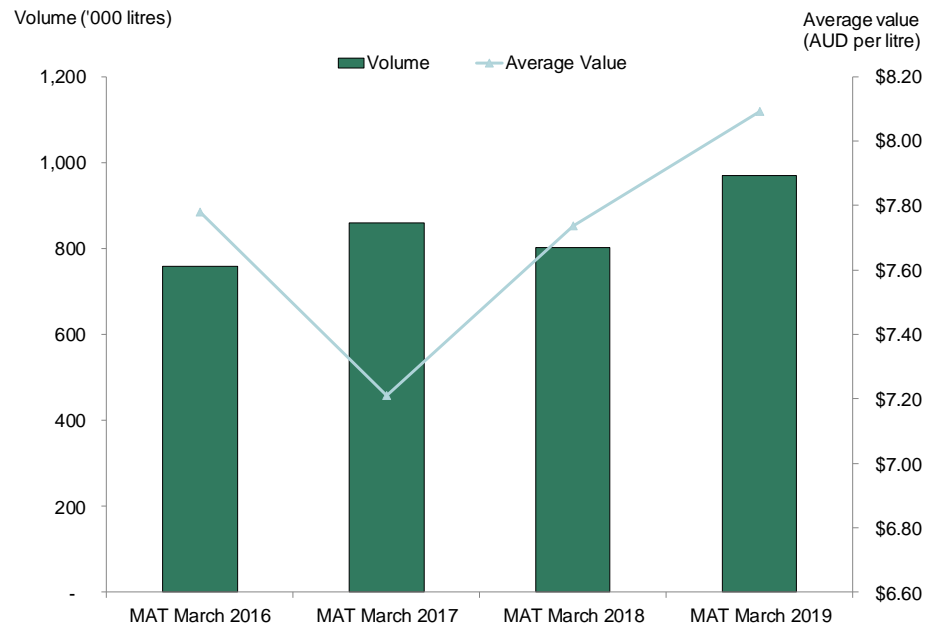
Overview

		MAT March 2018	MAT March 2019	Change
Red wine	Volume (litres)	468,243	584,105	25%
	Value (AUD)	\$3,740,463	\$4,799,718	28%
	Average value	\$7.99	\$8.22	3%
White wine	Volume (litres)	315,925	307,893	-3%
	Value (AUD)	\$2,221,914	\$2,222,980	0%
	Average value	\$7.03	\$7.22	3%
Total wine	Volume (litres)	801,961	969,371	21%
	Value (AUD)	\$6,204,081	\$7,842,817	26%
	Average value	\$7.74	\$8.09	5%

Total wine by price point



Total volume and average value

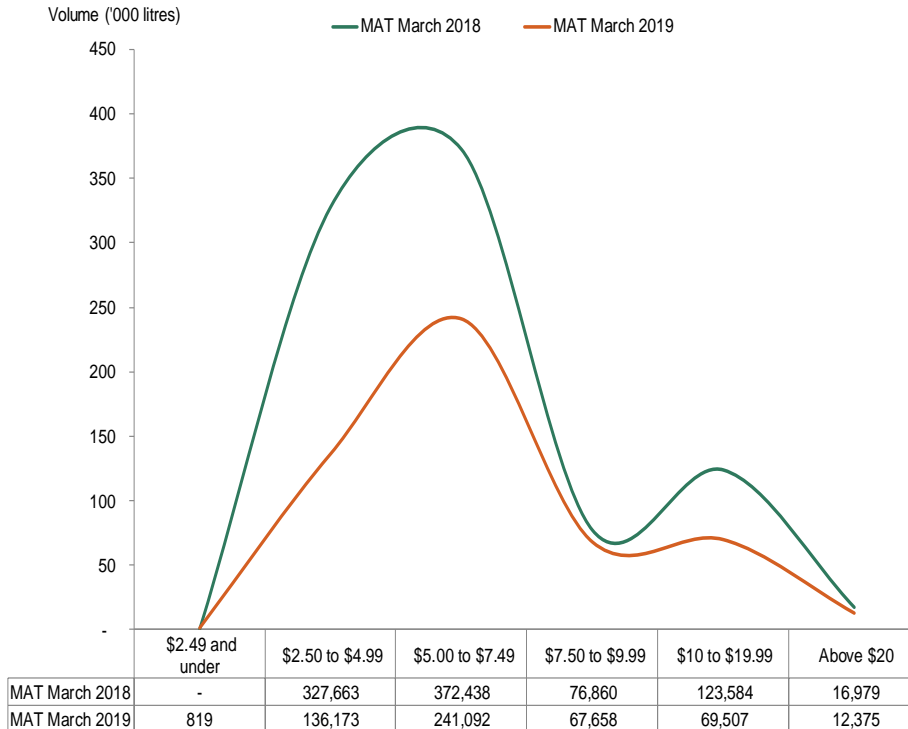


Bottled wine exports to United States Of America

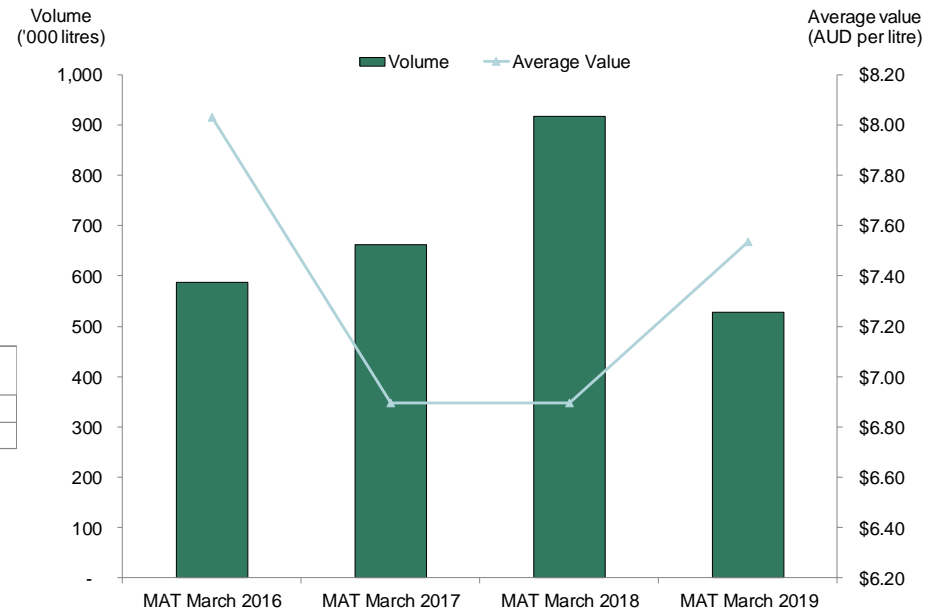
Overview

		MAT March 2018	MAT March 2019	Change
Red wine	Volume (litres)	508,208	250,577	-51%
	Value (AUD)	\$3,917,537	\$2,292,999	-41%
	Average value	\$7.71	\$9.15	19%
White wine	Volume (litres)	405,293	268,965	-34%
	Value (AUD)	\$2,341,175	\$1,571,600	-33%
	Average value	\$5.78	\$5.84	1%
Total wine	Volume (litres)	917,523	527,624	-42%
	Value (AUD)	\$6,326,389	\$3,976,641	-37%
	Average value	\$6.90	\$7.54	9%

Total wine by price point



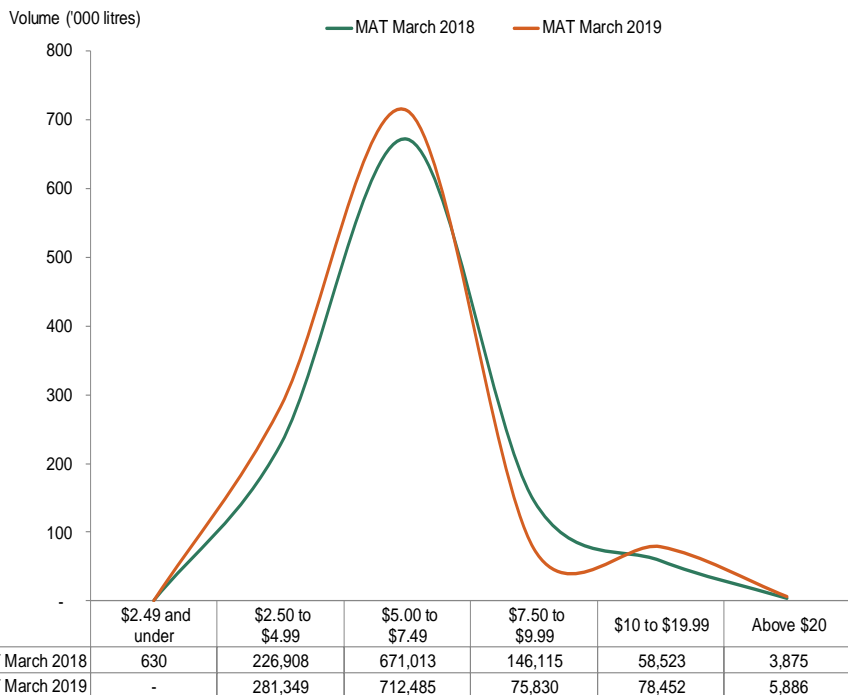
Total volume and average value



Bottled wine exports to Canada

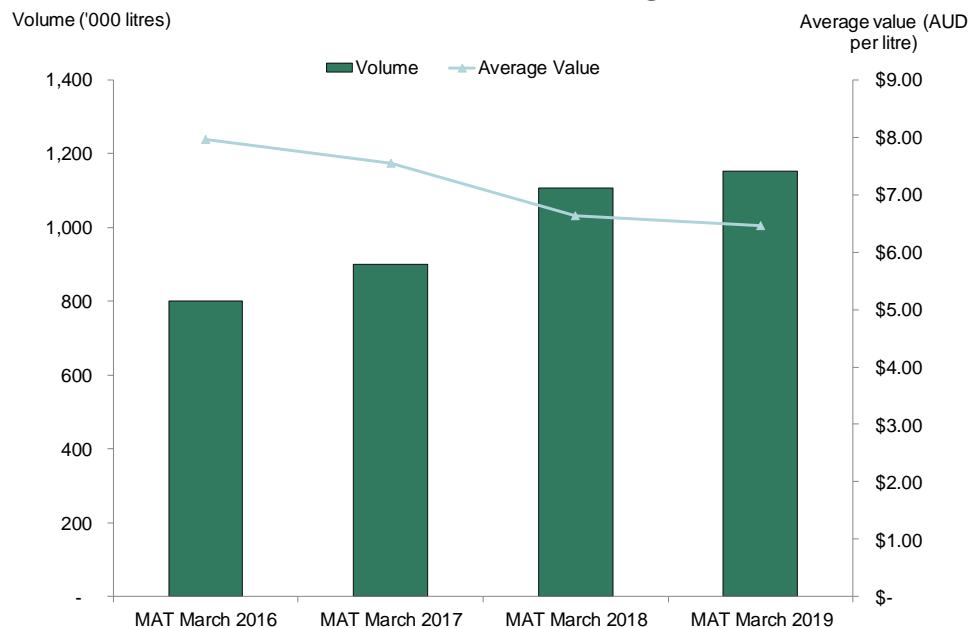
Overview

Total wine by price point



		MAT March 2018	MAT March 2019	Change
Red wine	Volume (litres)	1,040,204	1,053,387	1%
	Value (AUD)	\$6,893,861	\$6,846,733	-1%
	Average value	\$7	\$6	-2%
White wine	Volume (litres)	64,640	98,432	52%
	Value (AUD)	\$427,570	\$594,171	39%
	Average value	\$6.61	\$6.04	-9%
Total wine	Volume (litres)	1,107,063	1,154,001	4%
	Value (AUD)	\$7,339,630	\$7,458,239	2%
	Average value	\$6.63	\$6.46	-3%

Total volume and average value

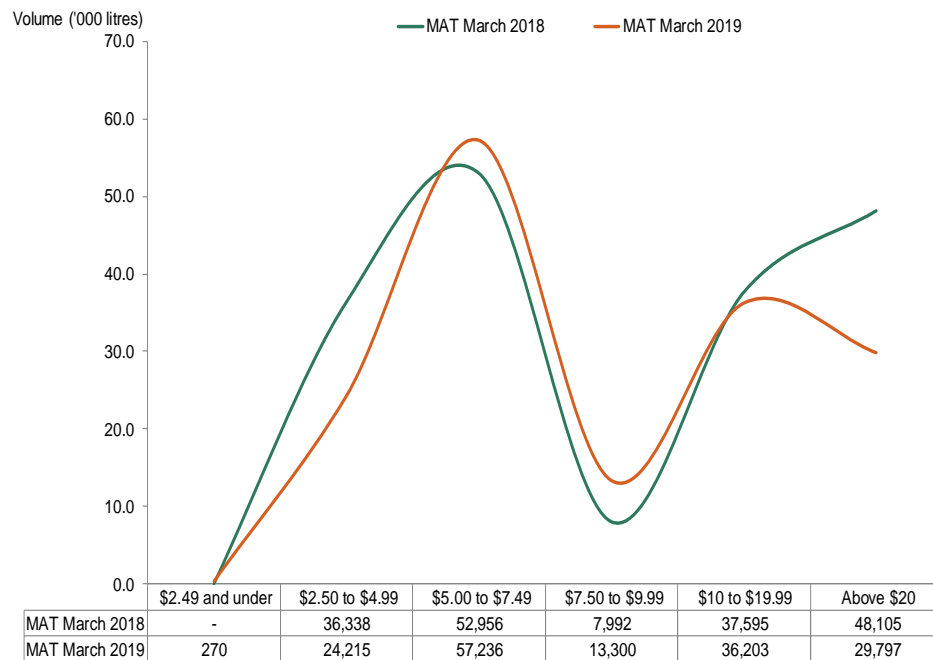


Bottled wine exports to Hong Kong

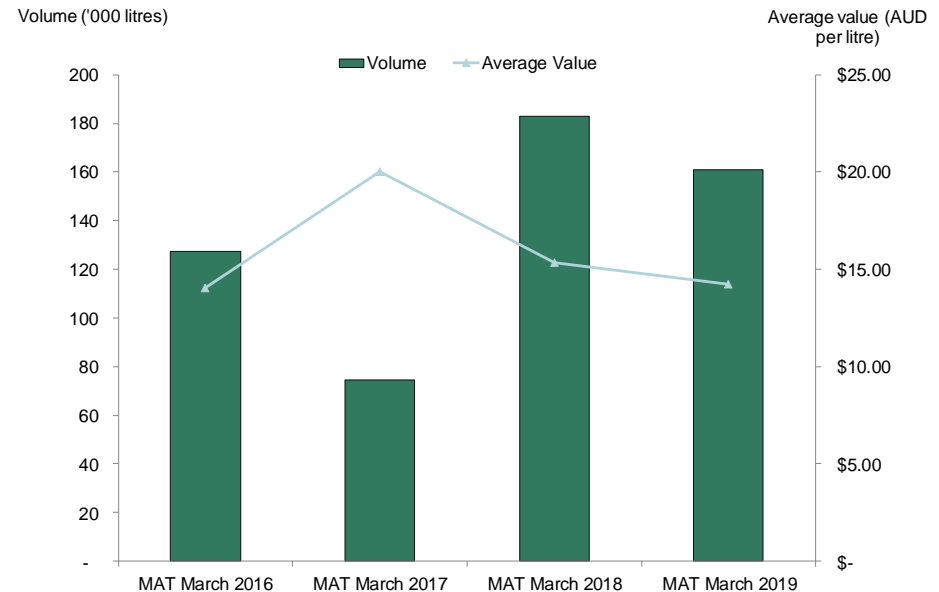
Overview

		MAT March 2018	MAT March 2019	Change
Red wine	Volume (litres)	156,107	128,132	-18%
	Value (AUD)	\$2,444,949	\$1,853,221	-24%
	Average value	\$15.66	\$14.46	-8%
White wine	Volume (litres)	23,864	31,714	33%
	Value (AUD)	\$299,621	\$417,544	39%
	Average value	\$12.56	\$13.17	5%
Total wine	Volume (litres)	182,985	161,020	-12%
	Value (AUD)	\$2,808,465	\$2,290,277	-18%
	Average value	\$15.35	\$14.22	-7%

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 Victoria.
- 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 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 March 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.