

Wine  
Australia  
providing  
insights on  
Australian  
Wine

Export Report  
Moving Annual Total (MAT)  
To December 2018

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# Summary Report

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# Executive summary

- Monthly value of exports in December the highest on record.
- Record growth in the average value of bottled wine, to a record value of \$6.20 per litre free on board.
- Record volume and value of exports above \$10 per litre.
- Record volume and value of unpackaged wine shipments.
- China continues strong, sustainable growth.
- Continuing signs of recovery in the United States of America.
- Double digit growth in exports to several destinations including the United Kingdom, Canada, Japan and South Korea.

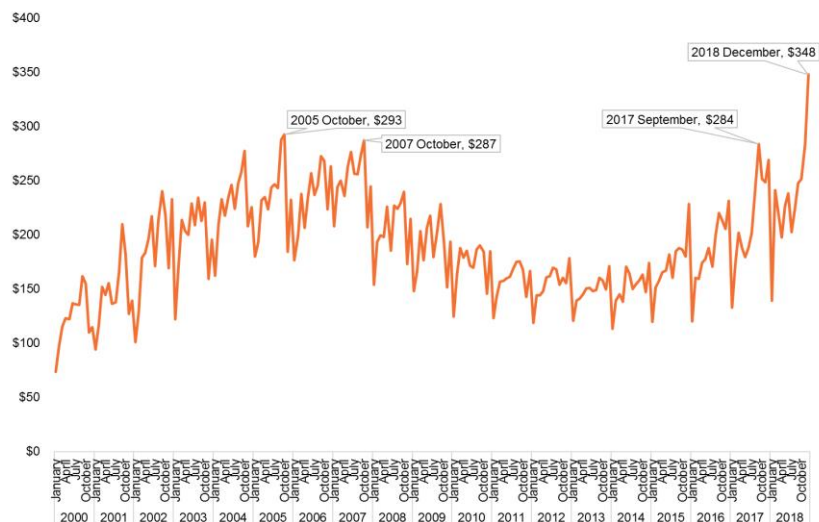
# Commentary

## Overview

In the year ended December 2018, Australian wine exports increased by 10 per cent in value to \$2.82 billion free on board (FOB) and 5 per cent in volume to 850 million litres (94 million 9-litre case equivalents). The average value of exported wine increased by 5 per cent to \$3.32 per litre FOB.

The monthly value of exports in December 2018 was the highest on record; it surpassed the previous record (in October 2005) by 19 per cent to reach \$348 million (see Figure 1). Due to the high level of premium wine shipments, the volume of exports in December was the second highest by month on record. The value of exports above \$10 per litre grew by 22 per cent to reach a record level.

Figure 1: Australian wine exports by month (million AUD FOB)



## Packaged and unpackaged wine

Bottled wine shipments increased by 7 per cent in value to \$2.24 billion and decreased in volume by 3 per cent to 361 million litres (40 million 9-litre case equivalents). This resulted in an unprecedented growth rate in the average value of bottled wine, which grew by 10 per cent to a record level of \$6.20 per litre.

Other packaged formats include soft pack, which increased in value by 13 per cent to \$15 million and volume by 7 per cent to 7.8 million litres, and other alternative packaging, which increased in value by 9 per cent to \$6.8 million and declined in volume by 8 per cent to 1.1 million litres.

Unpackaged exports also experienced outstanding growth, reaching record levels in both volume and value. The value of unpackaged shipments of wine increased by 27 per cent in value to \$560 million and 12 per cent in volume to 480 million litres (53 million 9-litre case equivalents). The average value of unpackaged exports continued to grow, increasing by 14 per cent to \$1.17 per litre.

A large global wine harvest in 2018, economic uncertainty and static consumption are putting downward pressure on world bulk wine prices as Australia heads into vintage 2019. Australian wine prices are holding up thanks to strong demand and a favourable exchange rate, but international competition is likely to increase in the medium term as supply pressures ease.

## Exporter performance

There were 2543 active exporters in the 2018 calendar year, a 15 per cent increase on the previous year. There were 1747 companies that contributed to the growth in exports by either increasing their level of exports or commencing export. These companies contributed \$500 million to the overall growth in exports. There were also 1286 exporters who either decreased their level of exports or stopped exporting in the past 12 months. These companies offset the growth in exports by \$238 million.

# Commentary (continued)

The value exported by the 10 largest exporters increased by 8 per cent to \$1.68 billion. Value increased by 13 per cent to \$1.14 billion for all other exporters. This demonstrates that the growth is being shared across the sector.

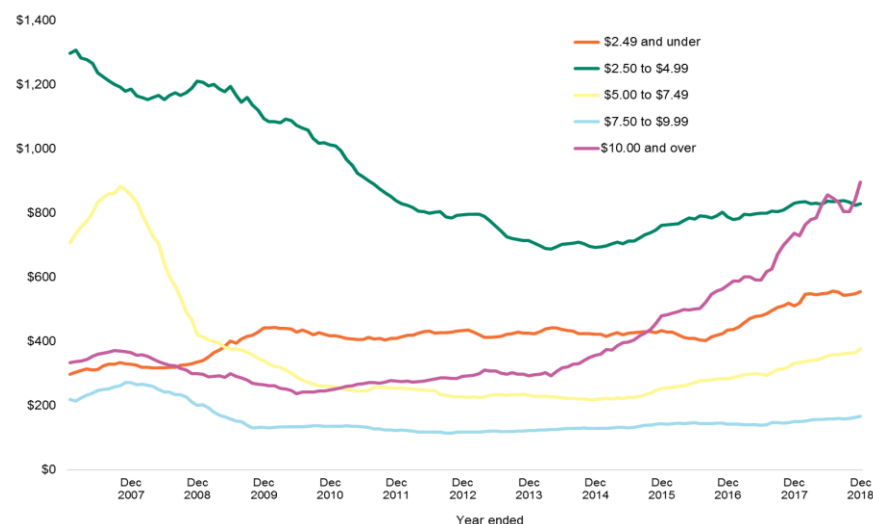
## Price segments

There was robust growth across the price spectrum in the past 12 months. In particular, exports valued above \$10 per litre FOB experienced strong growth of 22 per cent to reach \$895 million, a record value. The value of exports above \$10 per litre FOB now surpasses the value of exports in the \$2.50 to \$4.99 per litre segment, historically the largest segment of exports (see Figure 3).

Figure 2: Exports by price segment (million AUD FOB)

Price segment (A\$/litre)	MAT December 2018	Value change	Growth rate
\$2.49 and under	\$556	\$44	8.7%
\$2.50 to \$4.99	\$828	-\$1.4	-0.2%
\$5.00 to \$7.49	\$376	\$44	13%
\$7.50 to \$9.99	\$166	\$16	10%
\$10.00 to \$14.99	\$234	\$33	16%
\$15.00 to \$19.99	\$77	\$0.2	0.3%
\$20.00 to \$29.99	\$218	\$86	65%
\$30.00 to \$49.99	\$99	\$5.1	5%
\$50.00 to \$99.99	\$187	\$23	14%
\$100.00 to \$199.99	\$33	\$16	92%
\$200.00 +	\$48	-\$3.9	-7%
<b>Total value</b>	<b>\$2,821</b>	<b>\$262</b>	<b>10%</b>

Figure 3: Value of exports by price segment over time (million AUD FOB)



## Wine styles

Red wine continues to be the most popular wine style exported from Australia, and value increased by 12 per cent to \$2.14 billion in the year ended December 2018. The value of white wine exports also grew – by 10 per cent to \$607 million.

The top 5 variety label claims of red wine all recorded growth:

- Shiraz exports grew by 11 per cent to \$662 million
- No variety label claim (red blend, dry red, etc.) exports grew by 25 per cent to \$458 million
- Cabernet Sauvignon exports grew by 5 per cent to \$356 million
- Shiraz/Cabernet Sauvignon exports grew by 22 per cent to \$231 million, and
- Cabernet Sauvignon/Shiraz exports grew by 13 per cent to \$113 million.

# Commentary (continued)

All but 1 of the top 5 variety claims of white wine grew:

- No label claim (dry white, sweet white, etc.) exports grew by 18 per cent to \$265 million
- Chardonnay exports grew by 5 per cent to \$184 million
- Sauvignon Blanc exports grew by 3 per cent to \$43 million
- Pinot Grigio exports declined by 1 per cent to \$31 million, and
- Pinot Gris grew by 14 per cent to \$23 million.

The value of unpackaged shipments of red wine increased by 35 per cent to \$346 million, while the average value increased by 18 per cent to \$1.35 per litre FOB. The increase in value was driven by shipments to the United Kingdom (UK), mainland China and the United States of America (USA).

Unpackaged shipments of white wine increased by 17 per cent to \$214 million, with the average value increasing by 6 per cent to \$0.96 per litre FOB. This increase in value was driven by the UK, Canada, and Germany.

## Destinations

As illustrated in Figure 4, there was growth in Australian exports to nearly every region of the world in 2018. Exports to North America are starting to level out after being in decline for more than 12 months.

The value of exports to:

- Northeast Asia grew by 19 per cent to \$1.23 billion
- North America declined by 0.1 per cent to \$636 million
- Europe grew by 7 per cent to \$615 million
- Southeast Asia grew by 3 per cent to \$171 million
- Oceania grew by 12 per cent to \$105 million, and
- the Middle East grew by 36 per cent to \$33 million.

Figure 4: Value change by region (million AUD FOB)



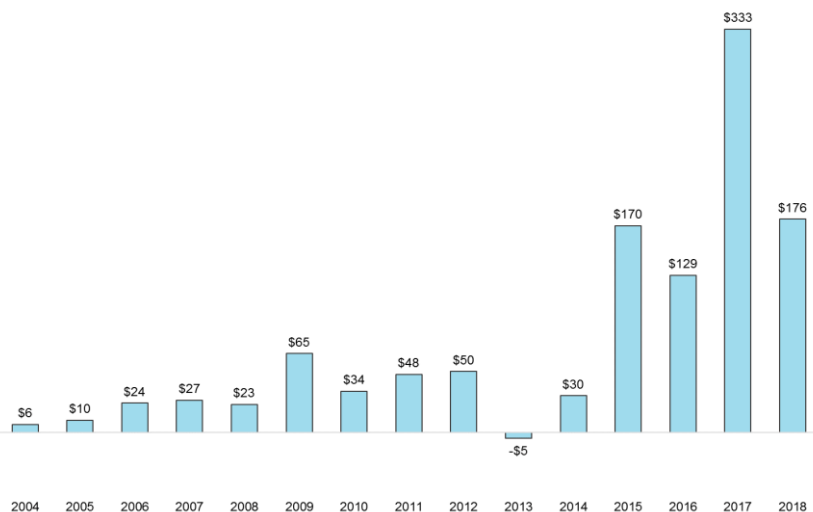
## China

Exports to China (including Hong Kong and Macau) in the 12 months to December 2018 increased by 18 per cent in value to \$1.14 billion and 7 per cent in volume to 172 million litres (19.1 million 9-litre case equivalents). Average value increased by 11 per cent to \$6.64 per litre FOB.

Value increased by 26 per cent in the 3 months to December 2018, compared to the same quarter in 2017, ahead of tariffs on wine imported from Australia being cut to zero on 1 January 2019 under the China–Australia Free Trade Agreement. This indicates that exports have recovered somewhat after the weak September 2018 quarter, in the lead up to Chinese New Year in February.

# Commentary (continued)

Figure 5: Year-on-year value change to China (million AUD FOB)



Although the value of year-on-year growth is smaller than in 2017 (see Figure 5), the absolute growth of \$176 million is still more than the total value of shipments to Singapore, Japan and South Korea combined.

David Lucas, Wine Australia's Regional General Manager North Asia, said 'the continuing growth and development of Australian wine is robust.

Ongoing adjustments to inventory management policies by some leading exporters, especially by more effective use of the China Duty Free Zones, will naturally distort the underlying trend of exports when reviewing on a quarter-by-quarter basis.

The timing of key Chinese festivals, especially the upcoming Chinese New Year in February 2019, and the removal of the final 2.8 per cent duty reduction element from 1 January 2019, will also affect exporters' timing decisions for their shipments.

There is continuing evidence of premium brands performing well with over half of the overall growth being achieved by wines above A\$20 per litre FOB (and in particular the A\$20–A\$30 price range) is strong – encouraging signals from the continuing premiumisation efforts.'

## Mainland China

Exports to mainland China continued to show strong, sustainable growth in 2018. The value of exports increased by 22 per cent to \$1.03 billion, while volume increased by 8 per cent to 164 million litres (18.2 million 9-litre case equivalents). The average value increased by 14 per cent to \$6.30 per litre FOB.

There has been a marked slowdown in total imports of all goods into China; import growth was 3 per cent in the year ended November 2018, the slowest rate since October 2016 (Reuters). The driving factor is an easing in demand, due to a slowing economy and unstable trade conditions.

Total wine imports into China declined by 5 per cent in volume the year ended November 2018. However, Australia is still outpacing all other imported countries of origin when it comes to the growth in volume of bottled wine imports (Global Trade Atlas). The International Wine and Spirit Record recently reported that imported wine is still one of the trendiest wine categories in China and forecasts an 8 per cent average growth rate between 2018 and 2022.

Shipments above \$10 per litre drove the growth to mainland China, increasing by 38 per cent to \$520 million, making up more than half of the value of global Australian shipments above \$10 per litre. The decline of shipments valued below \$2.50 per litre was driven by both packaged and unpackaged wine shipments, further fuelling the increase in average value in this market.



# Commentary (continued)

Figure 6: Exports to mainland China by price segment (million AUD FOB)

Price segment (A\$/litre)	MAT December 2018	Value change	Growth rate
\$2.49 and under	\$62	-\$2.8	-4%
\$2.50 to \$4.99	\$236	\$18	8%
\$5.00 to \$7.49	\$152	\$21	16%
\$7.50 to \$9.99	\$65	\$7.6	13%
\$10.00 to \$14.99	\$119	\$33	39%
\$15.00 to \$19.99	\$38	\$6.2	19%
\$20.00 to \$29.99	\$150	\$71	91%
\$30.00 to \$49.99	\$55	-\$1.7	-3%
\$50.00 to \$99.99	\$117	\$24	25%
\$100.00 to \$199.99	\$14.7	\$6.5	79%
\$200.00 +	\$27	\$4.7	21%
<b>Total value</b>	<b>\$1,034</b>	<b>\$188</b>	<b>22%</b>

Red wine continues to be the favourite wine style exported to mainland China, contributing 96 per cent of total value and growing by 24 per cent in value to \$994 million.

Variety label claims driving this growth were:

- Shiraz, exports up 27 per cent to \$362 million
- Cabernet Sauvignon, exports up 14 per cent to \$173 million
- Shiraz/Cabernet Sauvignon, exports up 47 per cent to \$140 million
- No variety label claim (red blend, dry red, etc.), exports up 29 per cent to \$125 million, and
- Cabernet Sauvignon/Shiraz, exports up 27 per cent to \$74 million.

However, white wine has lost momentum recently, declining by 5 per cent in value to \$29 million. Driving this change is a decline in exports labelled as Chardonnay, which were down by 19 per cent to \$10 million. While Riesling also declined (by 5 per cent), white wines with no variety label claim, Pinot Gris and Semillon/Chardonnay showed growth.

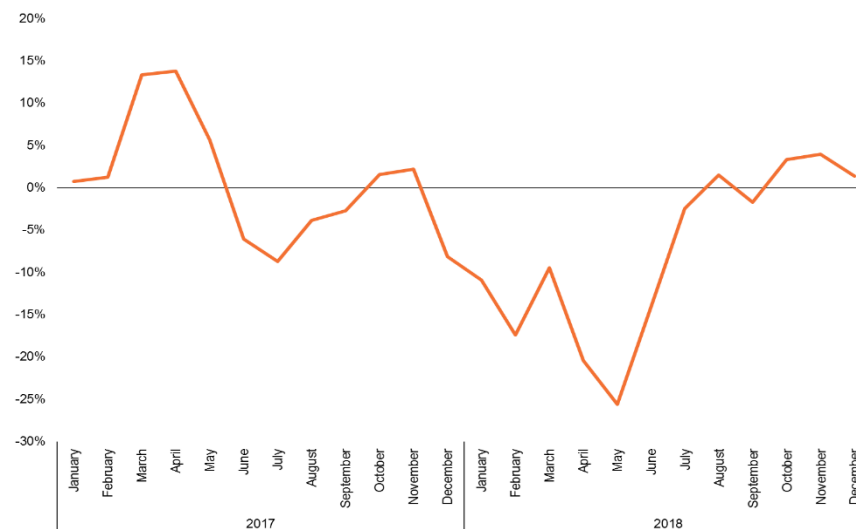
## North America

### United States of America

In the year ended December 2018, exports to the United States of America (USA) declined by 5 per cent in value to \$425 million and 7 per cent in volume to 161 million litres (17.9 million 9-litre case equivalents). As the volume decline outpaced value decline, average value increased by 1 per cent to \$2.64 per litre FOB.

However, there were signs of the decline easing at the end of the year. In the last quarter of 2018, value increased by 1 per cent compared to the same quarter in 2017. While this shift may be small, the most recent trend is a contrast to the negative quarterly growth rates at the start of 2018, as illustrated in Figure 7.

Figure 7: Rolling quarterly value growth rates to the USA



# Commentary (continued)

Bottled wine shipments to the USA declined by 9 per cent in value to \$337 million in the year ended December 2018, while unpackaged exports increased by 11 per cent to \$88 million. This was driven by a few large companies that are shifting to bottling in market rather than in Australia.

A review of export price segments (Figure 8) reveals further evidence of this trend, with the \$2.49 and under segment increasing by 3 per cent to \$95 million, while wines priced from \$2.50 to \$4.99 declined by 11 per cent to \$246 million. The biggest growth segment is wines priced from \$7.50 to \$9.99, which grew by 40 per cent to \$19 million. It is also pleasing to see the above \$10 segment improve on recent performance; it increased by 21 per cent on a quarterly basis.

Figure 8: Exports to the USA by price segment (million AUD FOB)

Price segment (A\$/litre)	MAT December 2018	Value change	Growth rate
\$2.49 and under	\$95	\$3.1	3%
\$2.50 to \$4.99	\$246	-\$30	-11%
\$5.00 to \$7.49	\$23	\$0.3	1%
\$7.50 to \$9.99	\$19	\$5.6	40%
\$10.00 to \$14.99	\$18	-\$0.7	-4%
\$15.00 to \$19.99	\$8.2	-\$2.1	-20%
\$20.00 to \$29.99	\$6.3	-\$0.6	-8%
\$30.00 to \$49.99	\$4.4	-\$0.2	-4%
\$50.00 to \$99.99	\$2.7	\$0.3	13%
\$100.00 to \$199.99	\$1.0	\$0.3	40%
\$200.00 +	\$0.4	-\$0.2	-33%
<b>Total value</b>	<b>\$425</b>	<b>-\$24</b>	<b>-5%</b>

Red wine declined by 8 per cent to \$234 million, driven by Shiraz (down 14 per cent to \$55 million), Cabernet Sauvignon (down 10 per cent to \$51 million) and Merlot (down 17 per cent to \$30 million).

However, white wine increased in value by 6 per cent to \$185 million. All but 1 of the top 5 white variety label claims experienced growth:

- No variety label claim (dry white, sweet white, etc.) exports grew by 12 per cent to \$70 million
- Chardonnay exports grew by 5 per cent to \$68 million
- Pinot Grigio exports grew by 5 per cent to \$25 million
- Sauvignon Blanc exports grew by 2 per cent to \$7.9 million, and
- Pinot Gris exports declined by 3 per cent to \$5.7 million.

Australia's positive performance in-market continues. According to IRI Worldwide and Nielsen-CGA, Australian wine is growing in both the off-trade and on-trade markets by 4 per cent in value to US\$521 million and US\$269 million respectively. The price segments that are driving Australia's growth in the off-trade are US\$8 to US\$10.99 per bottle (up by 93 per cent) and between US\$15 and US\$24.99 (up by 14 per cent).

Aaron Ridgway, Wine Australia's Regional General Manager Americas, said 'in certain segments, growth for Australian wines is outpacing that of the total market. This doesn't spell the end of a challenging marketplace but does indicate that Australian wines are finding a stronger footing in important consumer outlets. Larger customers are beginning to look to Australia for opportunities, which is very exciting.'

## Canada

Australian wine exports to Canada increased by 12 per cent in value to \$210 million, the highest value since 2011. Volume increased by 19 per cent to 74 million litres (8.2 million 9-litre case equivalents), a record level. Average value decreased by 5 per cent to \$2.84 per litre FOB.

# Commentary (continued)

A record amount of unpackaged wine shipments drove the growth, increasing by 43 per cent to \$47 million. In the past year, unpackaged wine shipments have moved from having a 55 per cent volume share of exports to a 61 per cent share. Double digit growth in the volume of unpackaged shipments to Quebec and British Columbia is driving this trend.

However, bottled wine shipments also increased, growing by 6 per cent to \$160 million. Key price segments driving the growth in bottled wine are the \$5 to \$7.49 segment, up by 17 per cent to \$72 million and the above \$10 segment, up by 12 per cent to \$26 million.

All provinces receiving Australian wine experienced growth in the past 12 months, with the top 4 provinces accounting for 97 per cent of the growth. Exports to:

- Ontario grew by 5 per cent to \$75 million
- British Columbia grew by 27 per cent to \$56 million
- Quebec grew by 14 per cent to \$46 million, and
- Alberta grew by 7 per cent to \$18 million.

While both red and white wine increased in value, white wine was the primary growth driver, with most of the key variety label claims growing.

The top 5 variety label claims of white wine are:

- No label claim (dry white, sweet white, etc.), exports were up by 28 per cent to \$42 million
- Chardonnay, exports were up by 37 per cent to \$16 million
- Pinot Gris, exports were up by 14 per cent to \$4.7 million
- Sauvignon Blanc, exports were up by 14 per cent to \$2.6 million, and
- Pinot Grigio, exports were down by 23 per cent to \$2.5 million.

Red varieties that increased in value include Shiraz (up by 4 per cent to \$46 million) and Cabernet Sauvignon (up by 8 per cent to \$21 million).

## Europe

### United Kingdom (UK)

In the year ended December 2018, Australian wine exports to the UK increased by 12 per cent to \$389 million, the highest value since 2013. Volume also increased, by 10 per cent to 246 million litres (27.3 million 9-litre case equivalents), solidifying the UK's position as the number one destination by volume.

As shown in Figure 9, both unpackaged and packaged exports with an average value below \$2.50 per litre increased by 11 per cent in value to \$210 million, while exports between \$2.50 and \$4.99 increased by 21 per cent to \$116 million.

Unpackaged wine drove overall growth, increasing by 27 per cent to \$214 million. The average value per litre of unpackaged wine also increased, by 10 per cent to \$1.06. Many larger brands bottle in the UK for domestic consumption or for shipment to other European countries. This growth of shipments to the UK is largely due to producers getting their product into market before trade regulations potentially get more difficult to navigate with the scheduled date for Brexit looming (29 March 2019).

Figure 9: Exports to the UK by price segment (million AUD FOB)

Price segment (A\$/litre)	MAT December 2018	Value change	Growth rate
\$2.49 and under	\$210	\$21	11%
\$2.50 to \$4.99	\$116	\$20	21%
\$5.00 to \$7.49	\$26	\$2.1	9%
\$7.50 to \$9.99	\$13	\$0.1	1%
\$10.00 to \$14.99	\$12	-\$1.1	-8%
\$15.00 to \$19.99	\$4.3	-\$0.3	-6%
\$20.00 to \$29.99	\$3.2	-\$0.1	-4%
\$30.00 to \$49.99	\$2.8	\$0.1	4%
\$50.00 to \$99.99	\$1.2	\$0.0	-3%
\$100.00 to \$199.99	\$0.3	-\$0.4	-53%
\$200.00 +	\$0.4	-\$0.5	-52%
<b>Total value</b>	<b>\$389</b>	<b>\$41</b>	<b>12%</b>

# Commentary (continued)

Bottled exports to the UK decreased by 3 per cent to \$175 million. This was mainly driven by some brands shifting to bottling in market; bottled shipments with an average value of \$2.49 and under per litre FOB declined by 80 per cent in value. However, bottled shipments between \$2.50 and \$9.99 per litre FOB increased by 17 per cent to \$23 million.

Both red and white wine experienced growth in exports to the UK this year; red wine increased by 13 per cent to \$238 million and white wine increased by 11 per cent to \$146 million. Red wine growth was largely driven by wines with no variety label claim and, to a lesser extent, Merlot and Pinot Noir. White wine growth was also driven by no variety label claims, with the best performing varieties being Sauvignon Blanc and Pinot Gris.

Australia's performance in the UK off-trade market continues to be positive, growing by 3 per cent in value to GBP1.2 billion in the year ended September 2018. This growth in value is driven by growth in premium wine, with Australian wines priced above GBP6 per bottle increasing at a rate of 11 per cent, outpacing the total market that grew by 4 per cent (IRI Worldwide).

Laura Jewell MW, Wine Australia's Regional General Manager EMEA, said 'there continues to be a lack of certainty around the timing, outcomes, implications and impacts on trade from Brexit. The Wine & Spirit Trade Association has launched a campaign lobbying the government to avoid the "no deal" option and is advising companies to prepare for the worst-case scenario. Consequently, we have seen an increase in Australian imports, particularly in unpackaged wine, as companies and brand owners seek to ensure that stock will be available across Europe.

On a positive note, sales of Australian wine in the off-trade are outperforming the market, despite the imminent duty increase due on 1 February that will increase a bottle of wine by GBP0.07 and the varied results of the grocers over the Christmas trading period. According to IRI data, the big Australian brand names are generally enjoying positive growth, with 6 of the top 15 brands in the UK coming from Australia.'

## *Other European destinations*

There were mixed results for the other top European destinations; exports to:

- Germany declined by 7 per cent to \$54 million
- the Netherlands grew by 15 per cent to \$42 million
- Denmark grew by 19 per cent to \$25 million
- Sweden grew by 13 per cent to \$24 million
- Belgium declined by 4 per cent to \$15 million, and
- Finland declined by 10 per cent to \$15 million.

## **Free trade agreements – three years on**

### *Japan*

In 2018, the third year since the Japan–Australia Economic Partnership Agreement (JAEPA) came into force, exports to Japan increased by 17 per cent in value to \$55 million and 31 per cent in volume to 18 million litres (1.9 million 9-litre case equivalents). In the past 12 months, Japan has overtaken both Germany and Malaysia to become Australia's eighth-largest destination by value.

Exports of both bottled and unpackaged wine increased in value, by 6 and 125 per cent respectively. Under JAEPA, the tariff on unpackaged wine was immediately cut to zero and this has contributed to a shift in the volume share of unpackaged wine from 27 per cent to 46 per cent in the past 12 months. The tariff on bottled wine will reduce to zero by 2022; it is currently 5.6 per cent. As illustrated in Figure 10, while the value of bottled wine shipments increased in 2018, the volume declined by 7 per cent to 7.1 million litres, resulting in an increase in bottled average value of 13 per cent to \$5.61 per litre FOB. Premium wines exported to Japan are growing strongly; wines exported with an average value of \$10 and above increased by 73 per cent to \$13 million in the past 12 months.

# Commentary (continued)

Figure 10: Volume and value of bottled wine exports to Japan

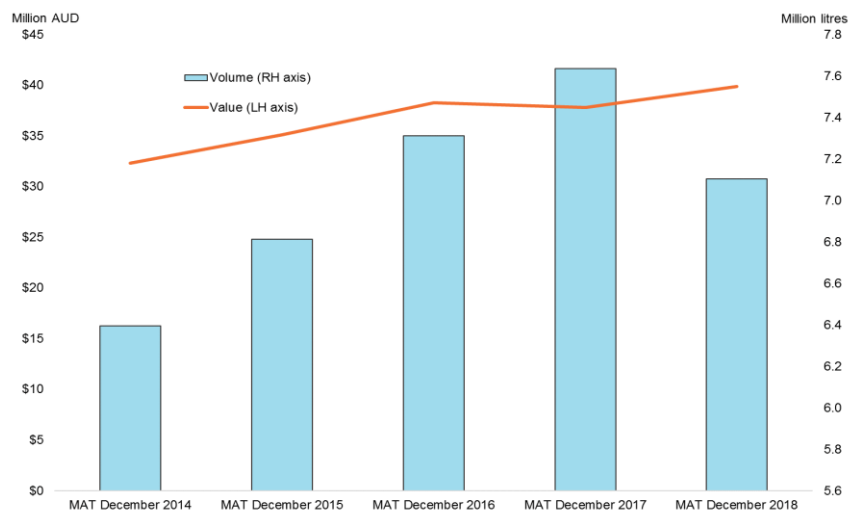
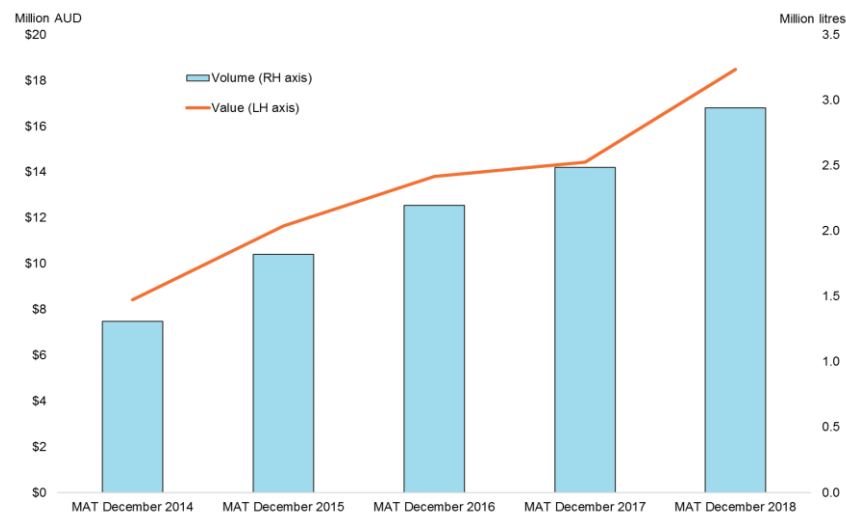


Figure 11: Volume and value of wine exports to South Korea



## South Korea

Exports to South Korea increased by 28 per cent in value to \$18 million and by 18 per cent in volume to 2.9 million litres. The Korea–Australia Free Trade Agreement (KAFTA) came into force on 12 December 2014, removing a 15 per cent tariff on all Australian wine imports and resulting in consistent growth in both volume and value over the last three years.

Some 83 per cent of shipments to South Korea are bottled wine, while most of the remainder is shipped in soft-packs. Exports at nearly all price segments increased, with the largest growth coming from wines in the segment between \$5 and \$7.49 (up 30 per cent) and the segment above \$10 per litre (up 40 per cent).

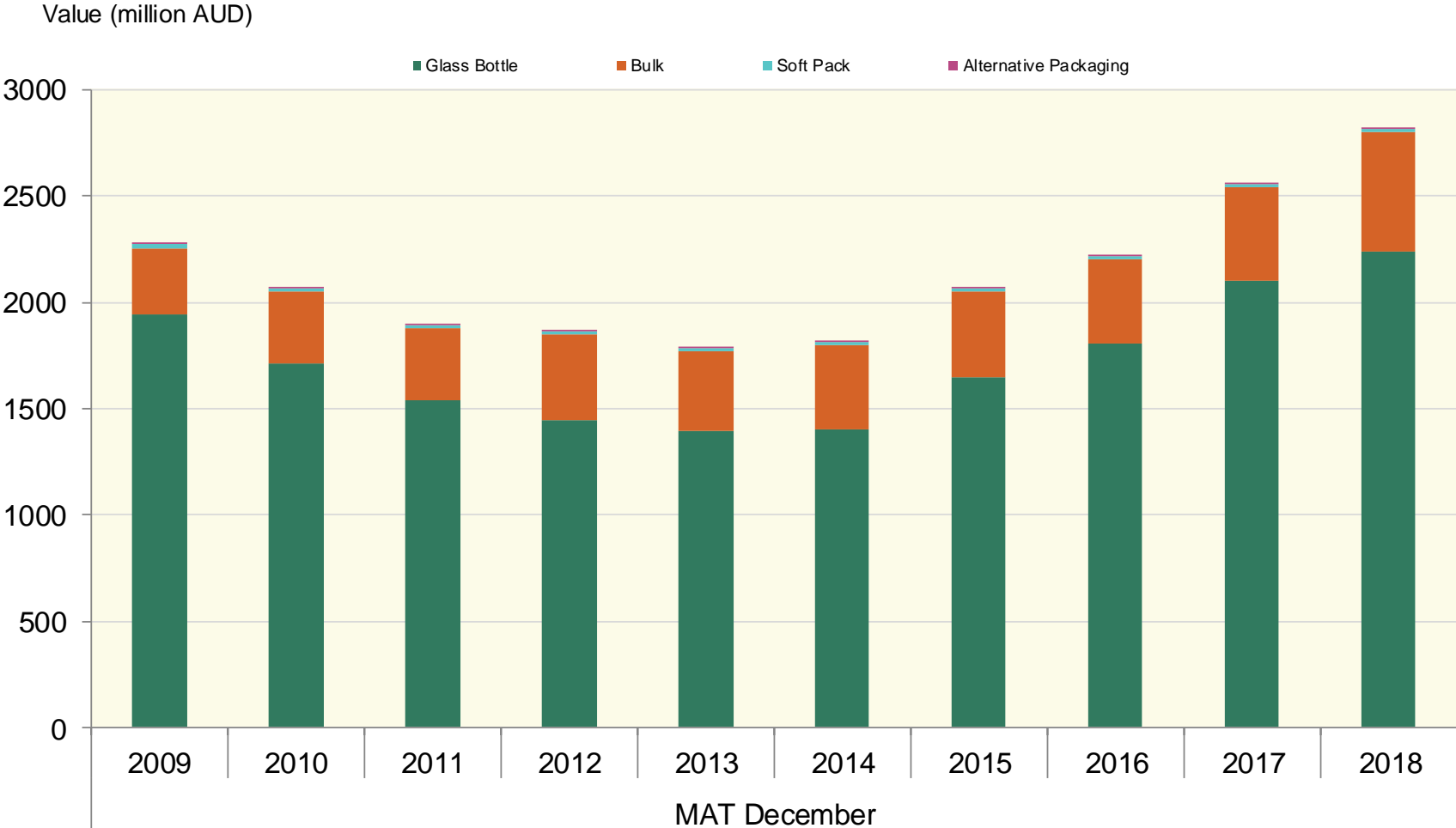
## Other destinations

Other destinations in growth include:

- New Zealand, where exports grew by 14 per cent to \$93 million
- Singapore, where exports grew by 18 per cent to \$89 million
- United Arab Emirates, where exports grew by 40 per cent to \$31 million
- Thailand, where exports grew by 32 per cent to \$27 million
- Taiwan, where exports grew by 51 per cent to \$20 million
- India, where exports grew by 69 per cent to \$9.0 million.
- Indonesia, where exports grew by 39 per cent to \$6.5 million, and
- Vietnam, where exports grew by 33 per cent to \$5.1 million.

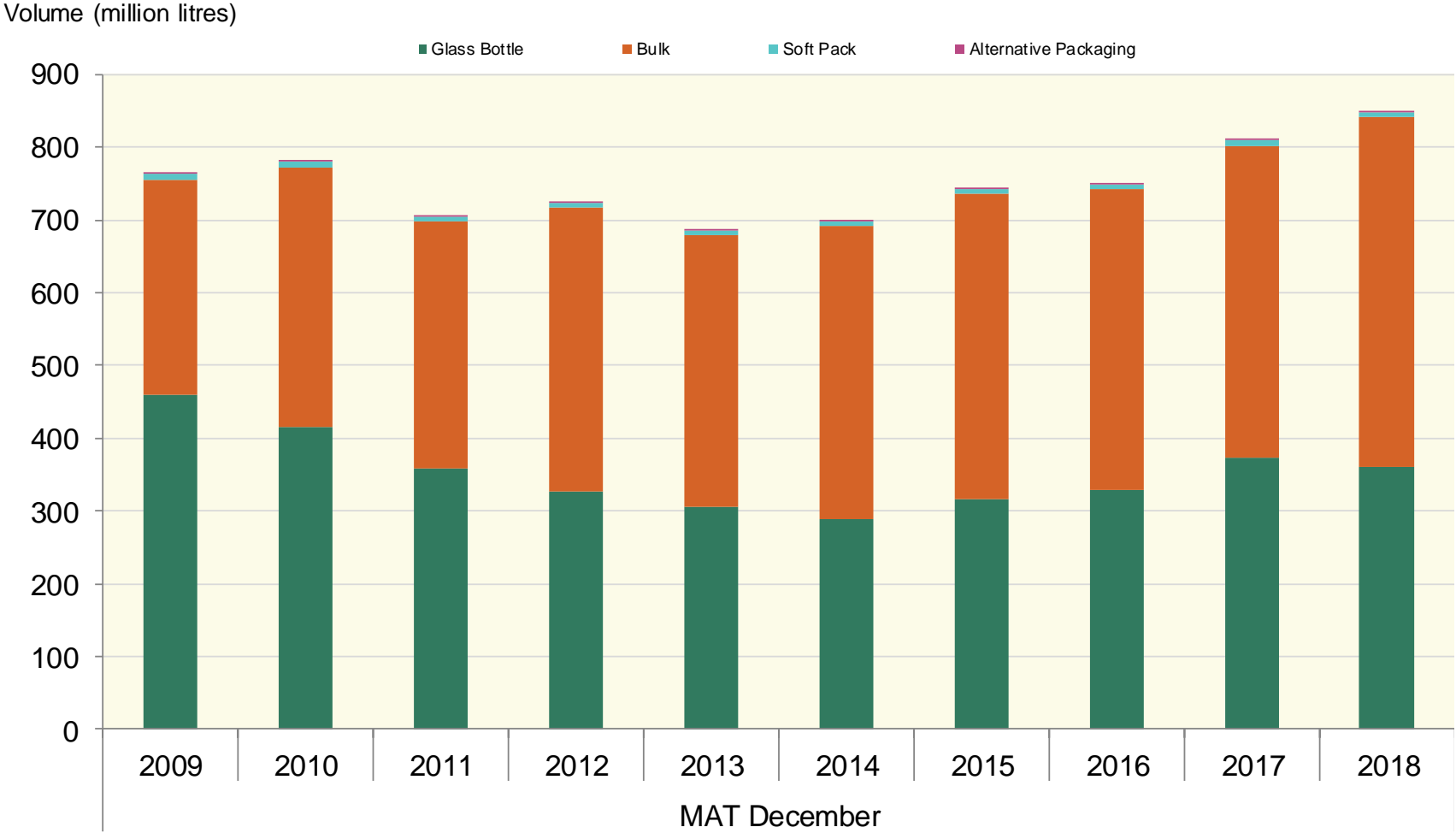
# Historic overview of exports

Value by container type in A\$ million



# Historic overview of exports

Volume by container type ('000 litres)

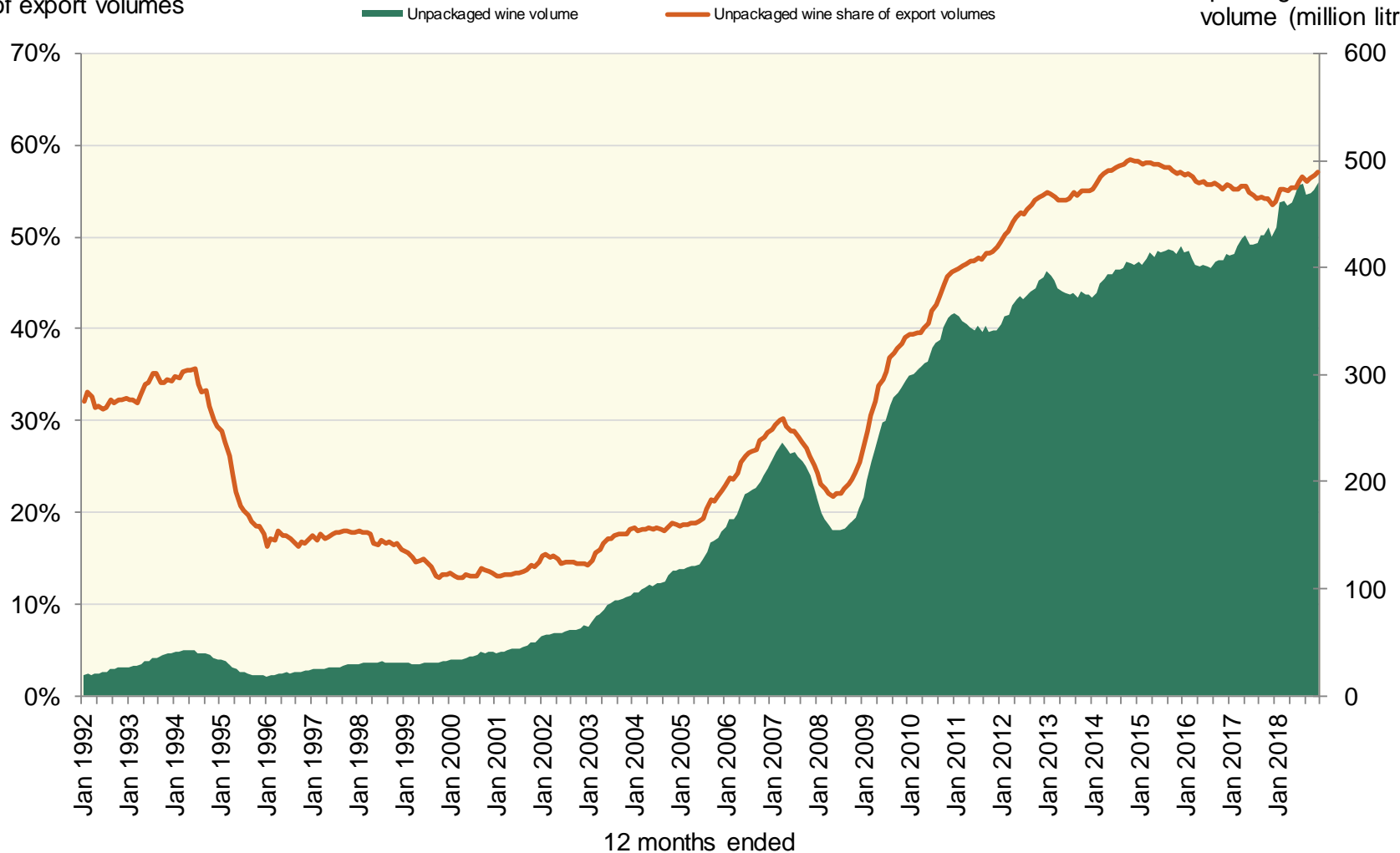


# Historic overview of exports

## Unpackaged share of export volumes

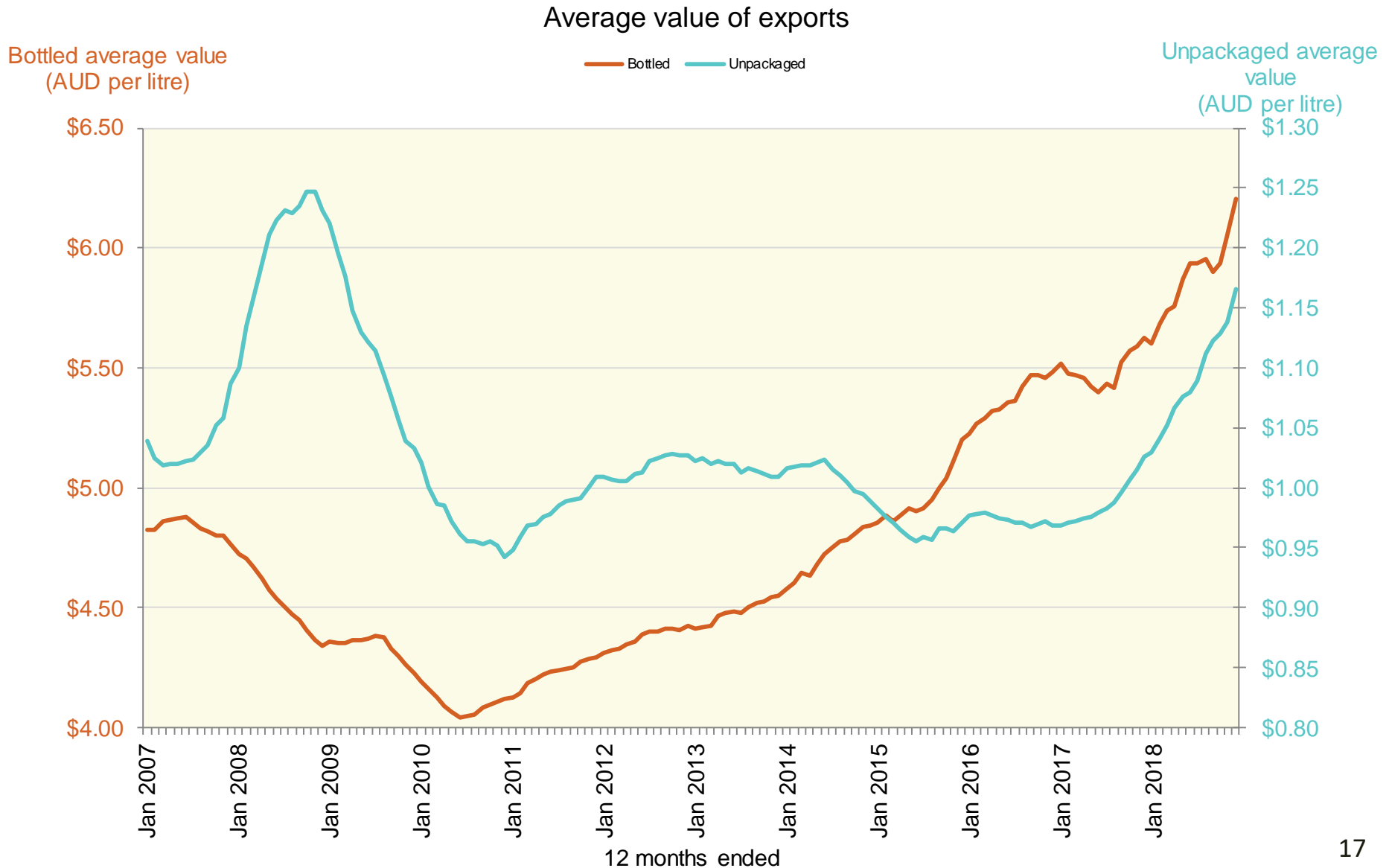
Unpackaged wine share  
of export volumes

Unpackaged wine export  
volume (million litres)





# Historic overview of exports

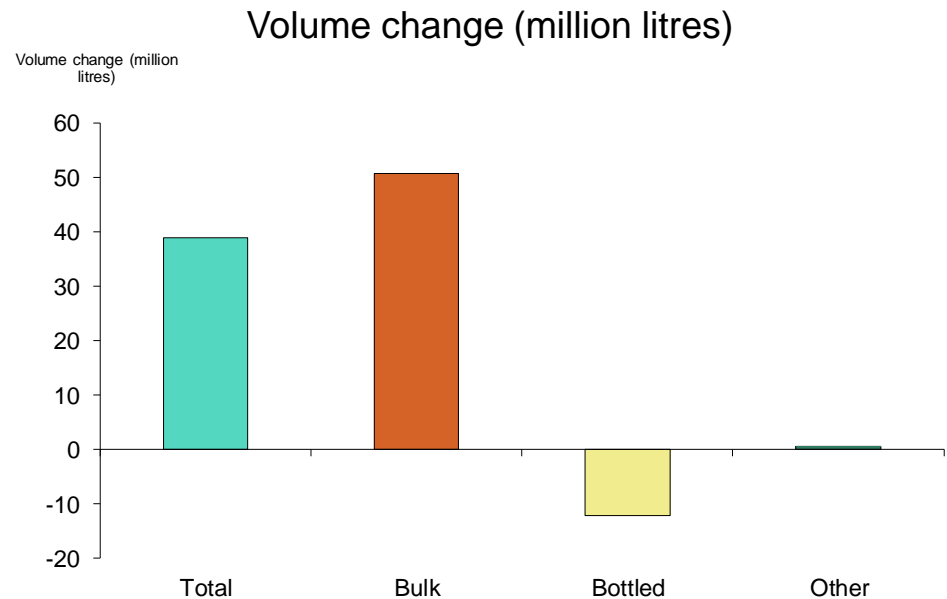
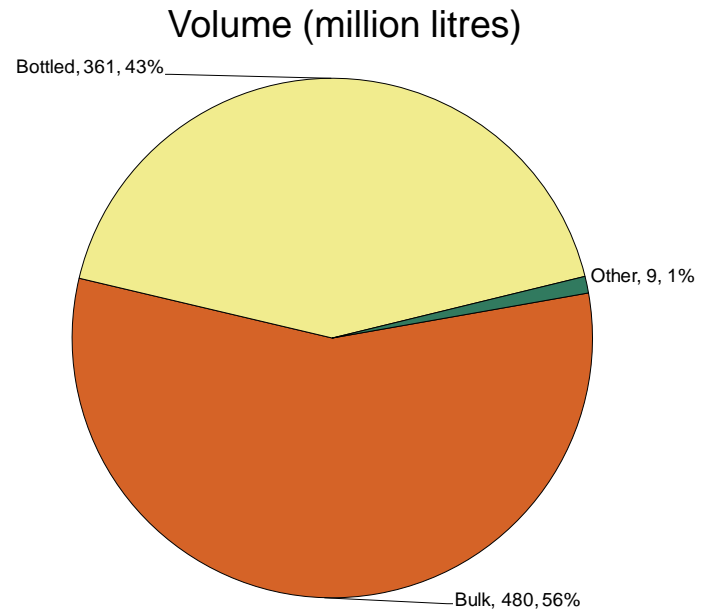


# Exports by container type

MAT December 2018

		Volume (ML)	Value (A\$M FOB)	Average Value (A\$/L FOB)
Bottled	2018	361	2,240	6.20
	Change	-3%	7%	10%
	Share	42%	79%	
Bulk	2018	480	560	1.17
	Change	12%	27%	14%
	Share	56%	20%	
Other	2018	9	22	2.45
	Change	5%	12%	6%
	Share	1%	1%	
Total	2018	850	2,821	3.32
	Change	5%	10%	5%
	Share	100%	100%	

“Other” includes wine in soft-packs and alternative packaging



# Wine exports

## by country, container and colour

Value for MAT December 2018

	Glass Bottle Red Wine		Bulk Red Wine		Other Red Wine		Glass Bottle White		Bulk White Wine		Other White Wine		Sparkling Wine		Other Wine		Total Wine	
	MAT December 2018 (A\$ '000s)	Change %	MAT December 2018 (A\$ '000s)	Change %	MAT December 2018 (A\$ '000s)	Change %	MAT December 2018 (A\$ '000s)	Change %	MAT December 2018 (A\$ '000s)	Change %	MAT December 2018 (A\$ '000s)	Change %	MAT December 2018 (A\$ '000s)	Change %	MAT December 2018 (A\$ '000s)	Change %	MAT December 2018 (A\$ '000s)	Change %
China, Pr	909,015	22%	84,009	54%	747	8%	26,278	-2%	2,478	-31%	76	37%	6,841	-9%	4,530	-25%	1,033,973	22%
United States Of America	197,930	-14%	35,741	54%	75	-88%	133,914	12%	51,954	-6%	75	++	3,806	-14%	1,017	-94%	424,513	-5%
United Kingdom	103,084	-4%	134,467	30%	0	na	66,432	-1%	79,496	23%	0	-100%	4,257	2%	1,474	38%	389,210	12%
Canada	107,729	4%	20,824	28%	946	++	46,204	12%	26,483	57%	1,879	16%	3,854	5%	1,755	-26%	209,673	12%
Hong Kong	92,124	-14%	31	na	1,505	9%	7,451	13%	0	na	250	-21%	2,474	75%	855	35%	104,689	-11%
New Zealand	52,430	6%	13,572	++	791	39%	10,445	16%	7,699	17%	549	9%	4,676	-33%	3,225	52%	93,387	14%
Singapore	74,838	24%	0	na	236	-48%	7,244	1%	0	na	99	-11%	5,934	-11%	620	-15%	88,971	18%
Japan	21,949	11%	5,856	++	2,446	7%	11,204	8%	3,296	++	995	-4%	4,892	-7%	4,246	1%	54,883	17%
Germany, Federal Republic	12,929	-30%	20,446	4%	0	na	4,608	-1%	15,396	8%	0	na	120	-11%	25	-61%	53,524	-7%
Netherlands	13,382	-5%	4,850	29%	0	na	14,885	18%	7,401	56%	0	na	994	18%	120	-56%	41,633	15%
Malaysia	29,045	-38%	0	na	111	++	2,723	4%	0	na	16	++	234	32%	184	-31%	32,313	-35%
United Arab Emirates	22,856	66%	0	-100%	683	1%	5,439	-6%	0	na	445	-3%	1,018	-2%	671	29%	31,111	40%
Thailand	16,368	27%	1,443	85%	1,505	33%	4,353	24%	647	++	798	++	1,207	20%	187	++	26,507	32%
Denmark	9,598	5%	7,599	51%	0	na	4,046	30%	2,805	9%	0	na	819	31%	215	-69%	25,083	19%
Sweden	13,147	17%	2,242	-20%	0	na	5,744	5%	1,662	28%	0	na	1,163	++	57	++	24,014	13%
Taiwan	17,565	55%	0	na	354	46%	1,371	29%	44	na	137	36%	109	-16%	312	8%	19,891	51%
Korea, R	14,166	35%	0	na	1,012	12%	2,566	5%	0	na	37	-10%	585	79%	118	-56%	18,483	28%
Belgium	3,455	-21%	2,935	3%	0	na	3,487	-20%	4,901	25%	0	na	447	0%	213	26%	15,438	-4%
Finland	5,089	-28%	4,461	41%	0	na	2,557	-1%	2,784	-2%	0	na	272	-75%	273	-25%	15,435	-10%
Ireland	4,714	-39%	167	na	0	na	3,869	-38%	122	97%	0	na	152	-4%	17	-15%	9,042	-37%
Rest of the world	65,149	11%	6,971	-39%	1,775	5%	22,008	7%	6,361	42%	1,265	-3%	3,513	38%	2,111	-19%	109,155	6%
World	1,786,561	8%	345,612	35%	12,186	9%	386,827	7%	213,529	17%	6,621	12%	47,368	-4%	22,226	-42%	2,820,930	10%

# Wine exports

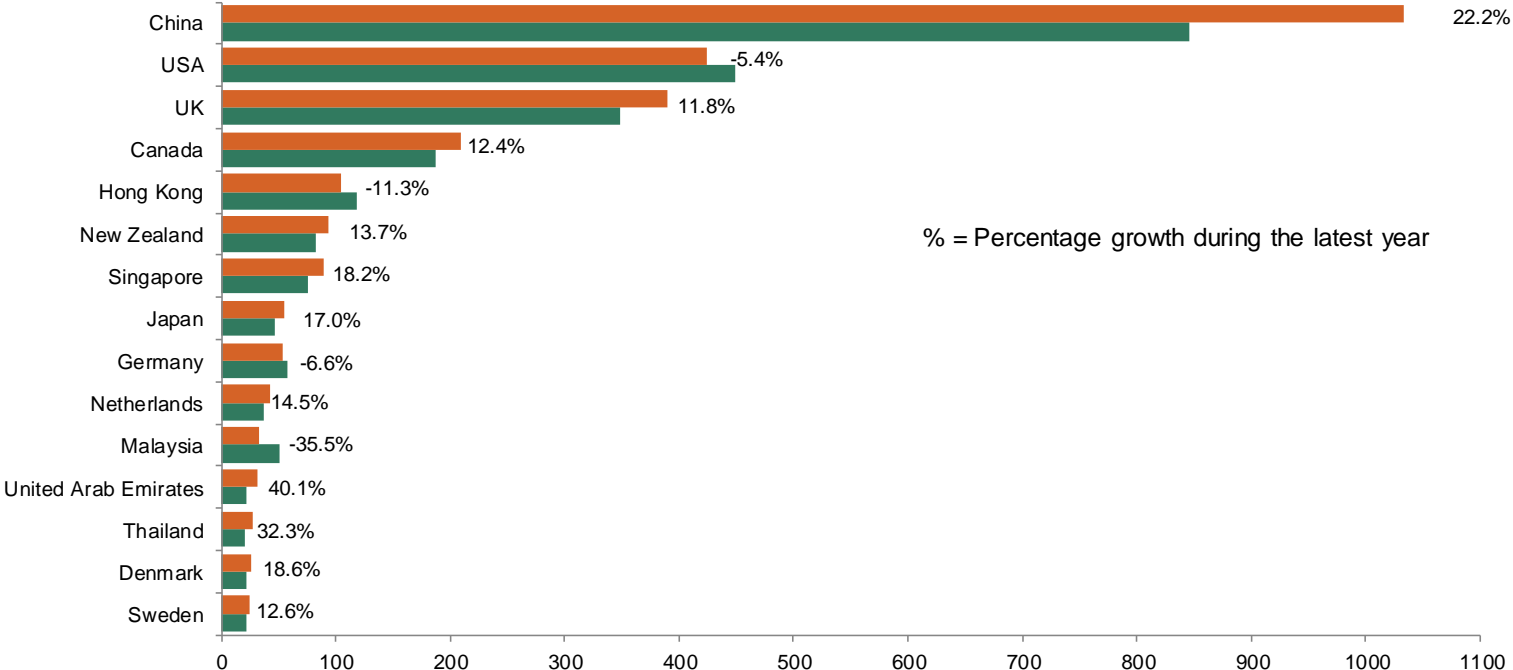
## by country, container and colour

Volume for MAT December 2018

	Glass Bottle Red Wine		Bulk Red Wine		Other Red Wine		Glass Bottle White Wine		Bulk White Wine		Other White Wine		Sparkling Wine		Other Wine		Total Wine	
	MAT December 2018 ('000 Litres)	Change %	MAT December 2018 ('000 Litres)	Change %	MAT December 2018 ('000 Litres)	Change %	MAT December 2018 ('000 Litres)	Change %	MAT December 2018 ('000 Litres)	Change %	MAT December 2018 ('000 Litres)	Change %	MAT December 2018 ('000 Litres)	Change %	MAT December 2018 ('000 Litres)	Change %	MAT December 2018 ('000 Litres)	Change %
United Kingdom	22,791	-8%	119,235	17%	0	na	18,983	-9%	83,540	13%	0	-100%	931	-4%	249	-5%	245,729	10%
China, Pr	111,399	9%	45,103	12%	228	-28%	4,196	-3%	1,536	-43%	25	-2%	913	-32%	620	-36%	164,020	8%
United States Of America	45,421	-19%	22,735	41%	14	-93%	36,888	7%	54,720	-9%	14	++	755	-4%	163	-96%	160,709	-7%
Canada	17,675	2%	18,867	13%	223	52%	9,736	6%	25,985	48%	440	27%	645	3%	333	-31%	73,905	19%
Germany, Federal Republic	2,793	-45%	15,141	-10%	0	na	1,021	-44%	16,373	-1%	0	na	8	-37%	6	-57%	35,342	-12%
New Zealand	10,014	4%	8,157	38%	352	22%	3,334	17%	8,987	4%	211	5%	868	-37%	615	30%	32,539	11%
Netherlands	3,748	-9%	3,853	5%	0	na	4,270	8%	7,950	44%	0	na	249	6%	34	-63%	20,104	14%
Japan	3,573	-4%	4,668	++	1,429	4%	2,008	-4%	3,370	++	582	0%	1,032	-12%	846	-6%	17,508	31%
Denmark	1,582	12%	6,087	26%	0	na	1,042	40%	3,000	-4%	0	na	180	35%	35	-80%	11,927	14%
Belgium	470	-38%	2,552	-8%	0	na	564	-44%	5,501	18%	0	na	78	-26%	26	-26%	9,192	-2%
Hong Kong	5,751	-12%	24	na	554	-2%	963	-1%	0	na	102	-27%	150	8%	79	23%	7,623	-9%
Finland	719	-38%	2,980	32%	0	na	529	-2%	2,792	-1%	0	na	34	-85%	67	-25%	7,120	0%
Sweden	2,572	9%	1,331	-21%	0	na	1,591	3%	866	18%	0	na	305	++	5	++	6,669	4%
Singapore	4,589	19%	0	na	128	-47%	904	-4%	0	na	51	22%	650	-1%	67	-13%	6,390	10%
Thailand	2,065	-3%	1,102	80%	776	29%	905	4%	696	++	415	88%	182	28%	43	++	6,183	28%
France	199	21%	2,698	21%	12	na	62	-18%	1,664	-20%	1	na	2	na	0	na	4,638	2%
United Arab Emirates	2,068	44%	0	-100%	403	-3%	922	-5%	0	na	304	-5%	141	-22%	186	25%	4,024	15%
Malaysia	2,556	-32%	0	na	60	++	488	0%	0	na	6	++	33	-3%	31	-29%	3,173	-27%
Korea, R	1,912	27%	0	na	482	12%	435	-2%	0	na	12	5%	82	59%	17	-62%	2,940	18%
Ireland	1,221	-41%	104	na	0	na	1,274	-37%	78	50%	0	na	33	-23%	5	54%	2,715	-35%
Rest of the world	11,838	3%	2,078	-72%	884	5%	4,853	6%	5,815	++	645	-5%	579	31%	519	-19%	27,211	-4%
World	254,954	-2%	256,717	14%	5,546	2%	94,968	0%	222,873	10%	2,807	9%	7,849	-11%	3,946	-56%	849,662	5%

# Exports by top 15 destinations

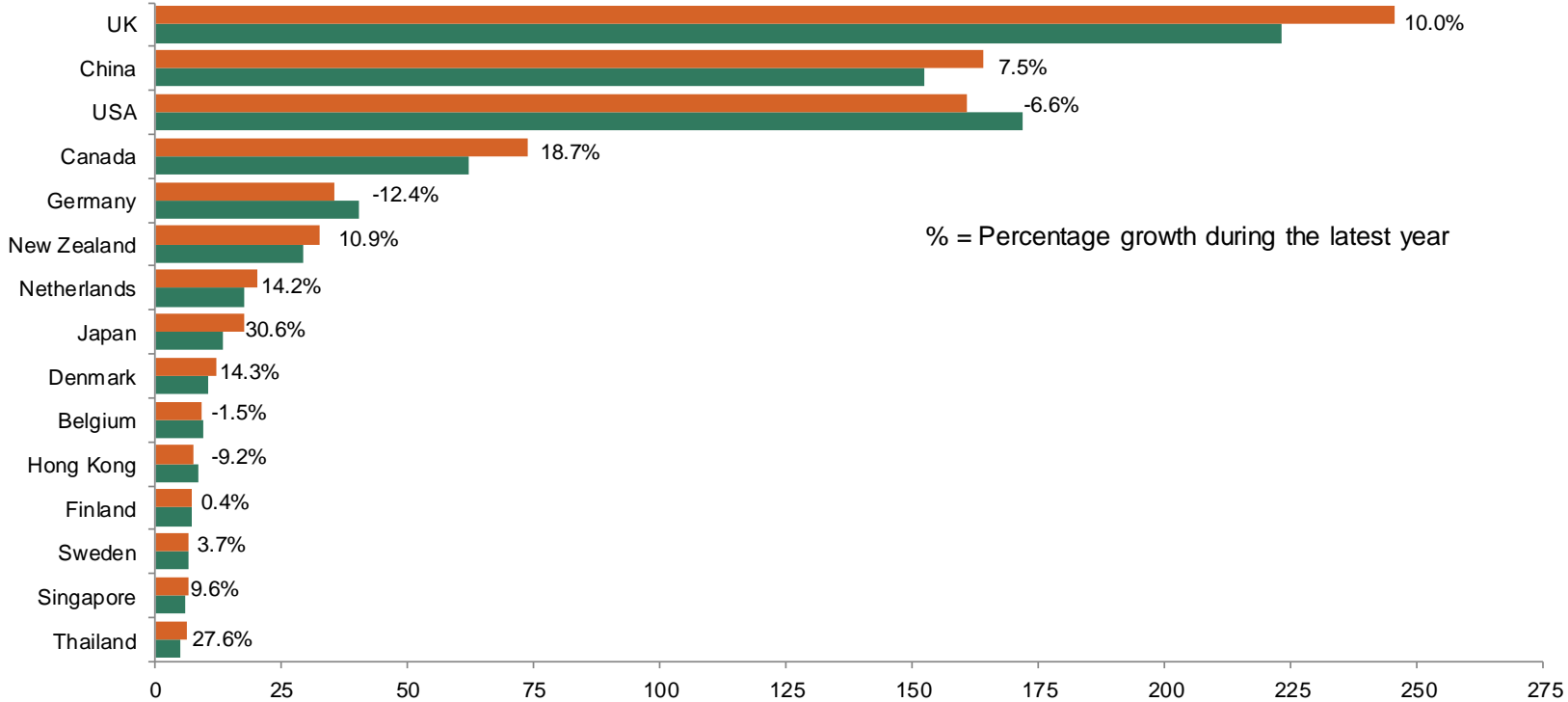
Value (million A\$) for MAT December 2018



	Sweden	Denmark	Thailand	United Arab Emirates	Malaysia	Netherlands	Germany	Japan	Singapore	New Zealand	Hong Kong	Canada	UK	USA	China
2018	24.0	25.1	26.5	31.1	32.3	41.6	53.5	54.9	89.0	93.4	104.7	209.7	389.2	424.5	1034.0
2017	21.3	21.1	20.0	22.2	50.1	36.3	57.3	46.9	75.3	82.1	118.0	186.5	348.1	448.8	846.1

# Exports by top 15 destinations

Volume (million litres) for MAT December 2018

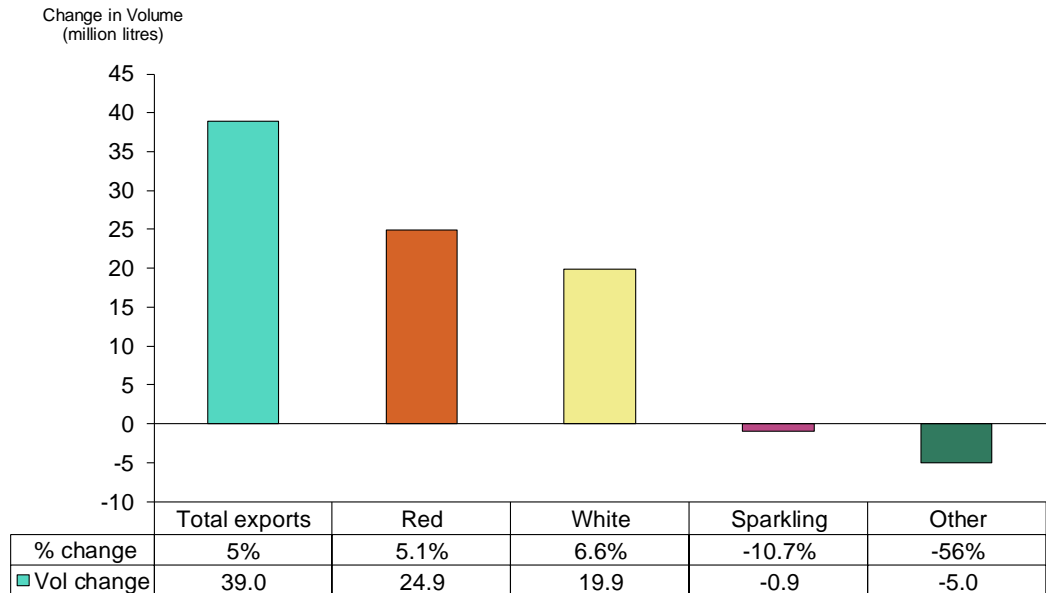
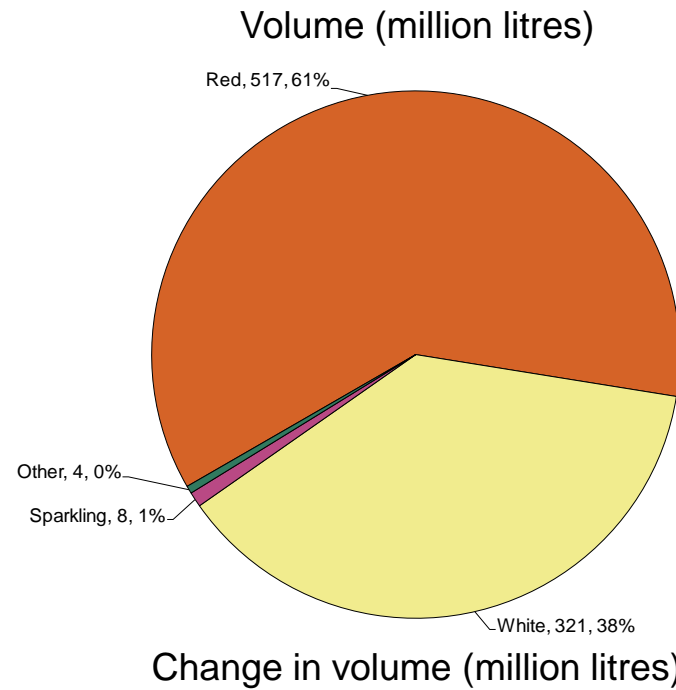


% = Percentage growth during the latest year

	Thailand	Singapore	Sweden	Finland	Hong Kong	Belgium	Denmark	Japan	Netherlands	New Zealand	Germany	Canada	USA	China	UK
2018	6.2	6.4	6.7	7.1	7.6	9.2	11.9	17.5	20.1	32.5	35.3	73.9	160.7	164.0	245.7
2017	4.8	5.8	6.4	7.1	8.4	9.3	10.4	13.4	17.6	29.3	40.3	62.2	172.0	152.5	223.4

# Exports by colour/ wine style

MAT December 2018



# Bottled wine exports report

Bottled exports by price point and destination	25
Bottled exports by colour/wine style	27
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Bottled exports by top 15 GI regions	37
Bottled exports by price point	41



# Bottled exports by price point and destination

Value ('000 A\$) for MAT December 2018

	\$2.49 and under		\$2.50 to \$4.99		\$5.00 to \$7.49		\$7.50 to \$9.99		\$10.00 to \$19.99		\$20.00 to \$49.99		\$50.00 and above		Total	
	MAT December 2018 ('000 AUD)	Change %	MAT December 2018 ('000 AUD)	Change %	MAT December 2018 ('000 AUD)	Change %	MAT December 2018 ('000 AUD)	Change %	MAT December 2018 ('000 AUD)	Change %	MAT December 2018 ('000 AUD)	Change %	MAT December 2018 ('000 AUD)	Change %	MAT December 2018 ('000 AUD)	Change %
China	8,002	-24%	217,181	1%	145,227	12%	56,783	0%	156,265	33%	204,442	52%	158,760	28%	946,661	20%
USA	10,513	-37%	244,177	-10%	22,199	0%	18,419	36%	26,448	-9%	10,728	-7%	4,184	10%	336,667	-9%
UK	5,484	-80%	106,891	20%	25,442	9%	12,893	4%	16,357	-8%	5,951	0%	1,951	-31%	174,969	-3%
Canada	1,062	-70%	45,140	0%	70,304	17%	17,486	-9%	21,915	12%	2,766	10%	844	19%	159,517	6%
New Zealand	2,100	-16%	32,969	4%	18,325	-1%	8,102	18%	6,392	13%	1,447	10%	1,380	22%	70,715	5%
Netherlands	4,598	-18%	16,886	-2%	5,271	82%	1,197	100%	935	-6%	302	-6%	174	50%	29,362	6%
Japan	652	-6%	18,058	-10%	5,219	-8%	3,318	-18%	5,505	13%	2,655	35%	4,483	869%	39,890	6%
Hong Kong	56	91%	10,034	1%	8,064	-11%	4,790	-26%	17,793	-15%	21,490	-5%	40,644	-14%	102,871	-12%
Singapore	341	105%	6,415	-2%	5,835	24%	7,541	109%	14,826	-28%	28,480	91%	25,184	4%	88,622	19%
Sweden	912	-37%	11,146	22%	3,250	14%	2,692	8%	1,445	51%	544	97%	122	100%	20,111	17%
Germany	2,773	-58%	5,270	-38%	2,988	13%	1,789	10%	3,423	27%	930	2%	510	50%	17,682	-24%
United Arab Emirates	24	-32%	6,050	10%	5,080	46%	2,522	57%	3,249	-8%	5,787	127%	7,112	69%	29,824	43%
Thailand	545	73%	6,639	-13%	3,203	49%	2,067	21%	2,645	33%	4,690	170%	2,326	16%	22,115	26%
Malaysia	113	-37%	4,648	-5%	4,873	-48%	1,611	-25%	3,627	-32%	10,515	-19%	6,799	-55%	32,185	-36%
Denmark	1,187	47%	4,205	8%	2,961	21%	2,193	-20%	2,625	10%	1,172	11%	336	48%	14,679	8%
Ireland	1,937	-13%	4,279	-54%	1,260	-2%	454	-49%	634	110%	159	-1%	29	-48%	8,752	-38%
Korea, R	-	-100%	3,488	0%	5,290	31%	1,876	75%	4,413	62%	1,700	2%	656	38%	17,423	29%
India	16	-14%	7,097	68%	476	17%	74	-1%	582	206%	198	253%	268	361%	8,711	73%
Taiwan	11	-30%	4,179	-16%	1,606	41%	554	-35%	2,527	23%	4,805	120%	5,674	258%	19,356	51%
Philippines	75	-12%	5,540	-6%	920	-38%	252	-37%	340	-65%	436	54%	764	102%	8,328	-12%
Other	1,294	-51%	29,346	-15%	19,577	22%	9,837	0%	17,959	3%	7,698	31%	5,510	43%	91,221	1%
Total	41,693	-49%	789,636	-2%	357,370	10%	156,449	5%	309,904	12%	316,896	40%	267,711	15%	2,239,660	7%

# Bottled exports by price point and destination

Volume ('000 litres) for MAT December 2018

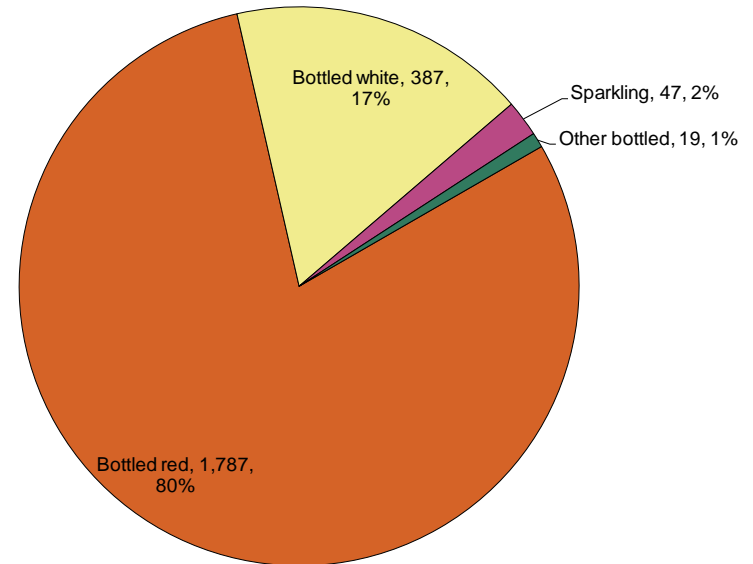
	\$2.49 and under		\$2.50 to \$4.99		\$5.00 to \$7.49		\$7.50 to \$9.99		\$10.00 to \$19.99		\$20.00 to \$49.99		\$50.00 and above		Total	
	MAT December 2018 ('000 Litres)	Change %	MAT December 2018 ('000 Litres)	Change %	MAT December 2018 ('000 Litres)	Change %	MAT December 2018 ('000 Litres)	Change %	MAT December 2018 ('000 Litres)	Change %	MAT December 2018 ('000 Litres)	Change %	MAT December 2018 ('000 Litres)	Change %	MAT December 2018 ('000 Litres)	Change %
China	3,771	-22%	59,922	0%	24,818	12%	6,524	-1%	12,363	36%	7,800	55%	1,929	31%	117,127	7%
USA	4,428	-37%	70,335	-12%	3,822	-2%	2,156	40%	2,036	-8%	395	-8%	53	10%	83,227	-13%
UK	2,327	-81%	33,089	20%	4,301	11%	1,485	4%	1,312	-7%	206	-1%	21	-18%	42,741	-9%
Canada	445	-70%	12,192	2%	11,732	17%	2,039	-9%	1,870	15%	96	7%	10	10%	28,384	3%
New Zealand	897	-17%	9,341	6%	3,031	0%	947	21%	528	19%	54	17%	22	47%	14,820	4%
Netherlands	2,286	-21%	4,891	2%	892	76%	144	109%	72	-10%	11	6%	2	54%	8,298	-1%
Japan	297	-5%	4,996	-8%	856	-10%	385	-19%	424	17%	91	25%	56	890%	7,105	-7%
Hong Kong	42	141%	2,528	-1%	1,310	-12%	555	-25%	1,391	-15%	759	-7%	349	-22%	6,934	-10%
Singapore	165	110%	1,609	-4%	940	23%	857	103%	1,158	-31%	1,160	97%	319	0%	6,207	12%
Sweden	385	-36%	3,140	22%	521	11%	302	7%	105	42%	18	100%	1	94%	4,472	11%
Germany	1,265	-67%	1,538	-33%	524	17%	214	17%	250	16%	33	8%	4	77%	3,828	-45%
United Arab Emirates	10	-39%	1,544	4%	841	47%	297	55%	266	-6%	218	137%	84	101%	3,260	22%
Thailand	225	47%	1,778	-20%	505	49%	244	22%	223	56%	194	172%	26	-5%	3,195	2%
Malaysia	49	-38%	1,234	-6%	834	-48%	184	-27%	290	-26%	447	-20%	69	-56%	3,107	-28%
Denmark	630	58%	1,227	8%	482	18%	255	-19%	202	14%	40	8%	4	32%	2,839	15%
Ireland	912	-23%	1,289	-51%	217	2%	53	-46%	57	125%	5	-31%	0	-61%	2,534	-39%
Korea, R	-	-100%	913	0%	936	31%	218	70%	317	55%	54	-10%	7	26%	2,444	20%
India	8	-48%	1,970	58%	85	26%	9	-1%	50	232%	7	243%	4	401%	2,134	58%
Taiwan	5	-31%	1,025	-17%	279	45%	65	-34%	187	21%	177	121%	59	220%	1,797	1%
Philippines	33	-17%	1,445	-8%	159	-38%	30	-36%	26	-66%	17	59%	9	123%	1,719	-14%
Other	588	-52%	7,945	-15%	3,358	25%	1,144	1%	1,416	5%	279	28%	65	39%	14,794	-8%
Total	18,770	-50%	223,950	-3%	60,445	11%	18,107	5%	24,543	13%	12,060	42%	3,092	17%	360,966	-3%

# Bottled exports by colour/wine style

## Value

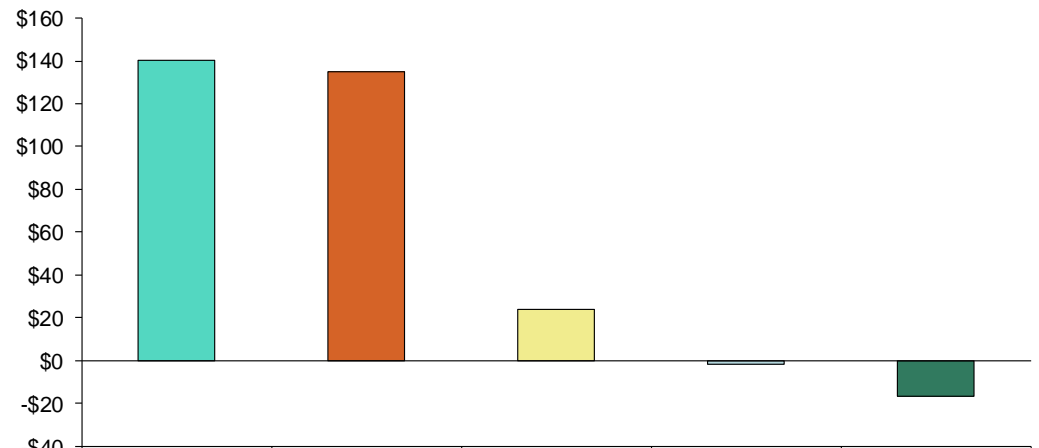
MAT December 2018

Value (A\$ million)



Change in value (A\$ million)

Change in Value (million AUD)



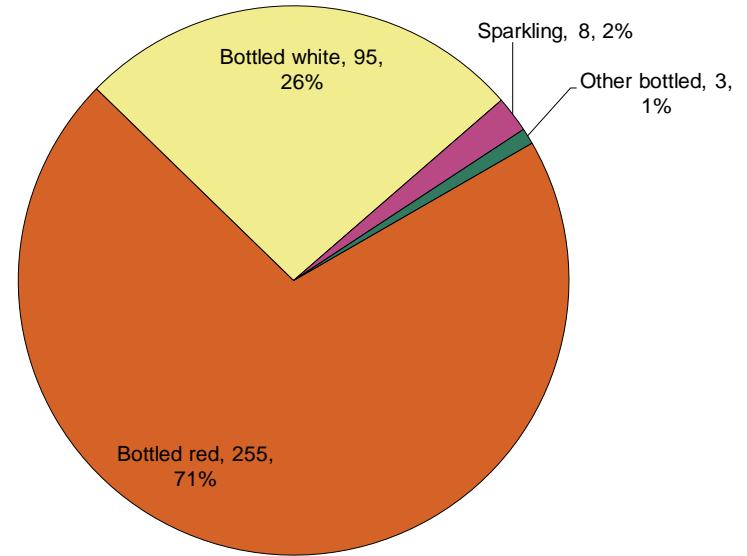
	Total bottled	Bottled red	Bottled white	Sparkling	Other bottled
% change	6.7%	8.2%	6.6%	-3.8%	-46.5%
Vol change	140.6	135.1	24.1	-1.9	-16.8

# Bottled exports by colour/wine style

## Volume

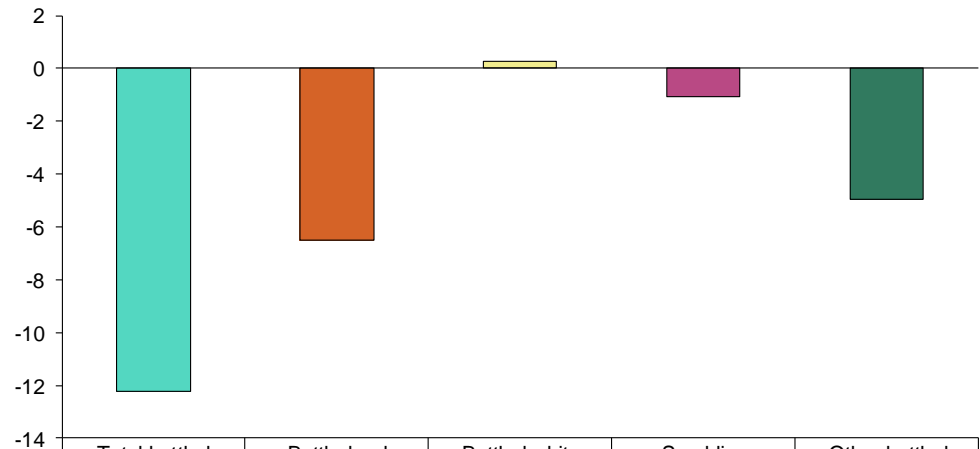
MAT December 2018

Volume (million litres)



Change in volume (million litres)

Change in Volume (million litres)



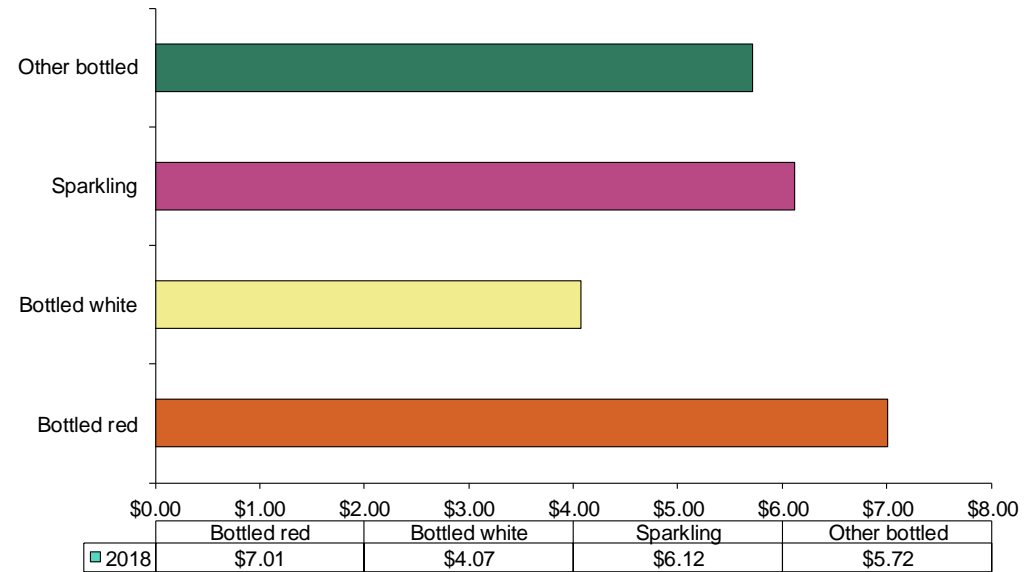
	Total bottled	Bottled red	Bottled white	Sparkling	Other bottled
% change	-3.3%	-2.5%	0.3%	-12.1%	-59.4%
Vol change	-12.2	-6.5	0.3	-1.1	-4.9

# Bottled exports by colour/wine style

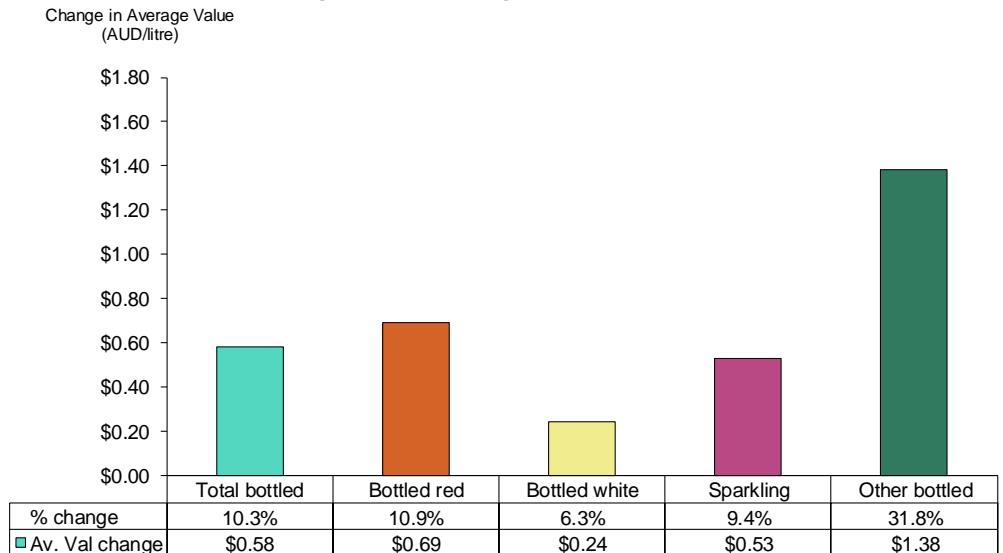
## Average value

MAT December 2018

Average value (A\$ per litre)

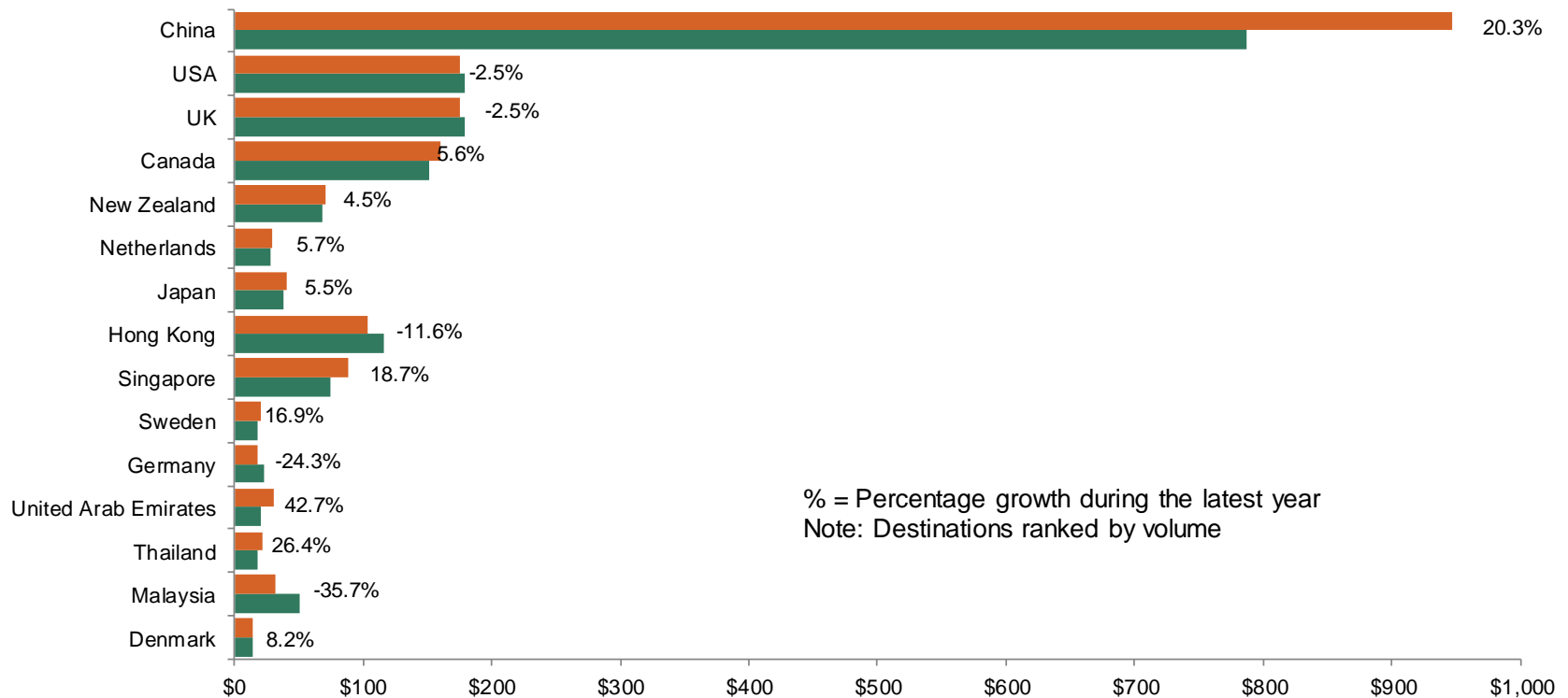


Change in average value (A\$ per litre)



# Bottled exports by top 15 destinations

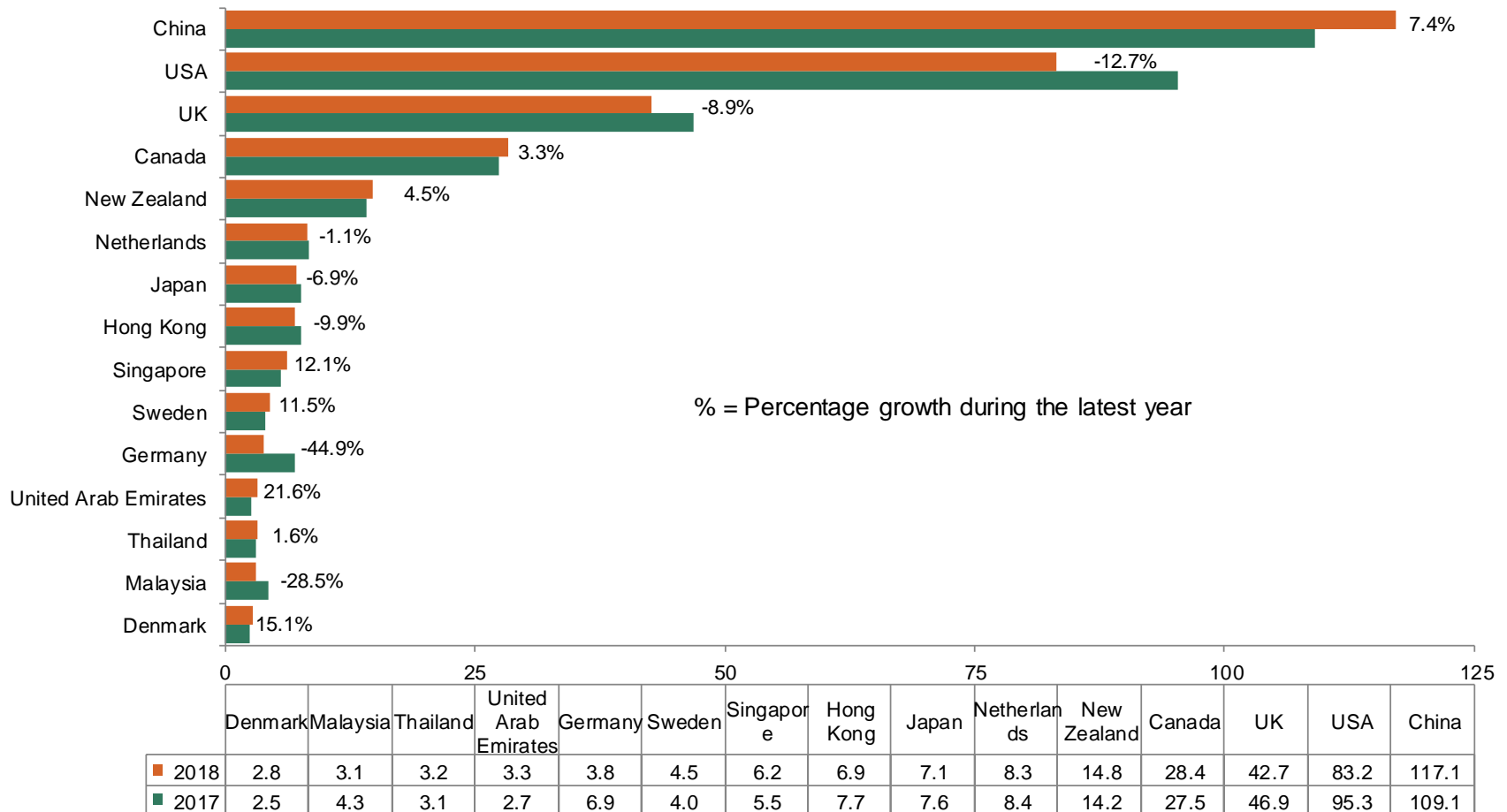
Value (million A\$) for MAT December 2018



	Denmark	Malaysia	Thailand	United Arab Emirates	Germany	Sweden	Singapore	Hong Kong	Japan	Netherlands	New Zealand	Canada	UK	USA	China
2018	14.7	32.2	22.1	29.8	17.7	20.1	88.6	102.9	39.9	29.4	70.7	159.5	175.0	175.0	946.7
2017	13.6	50.0	17.5	20.9	23.4	17.2	74.7	116.3	37.8	27.8	67.7	151.1	179.5	179.5	787.2

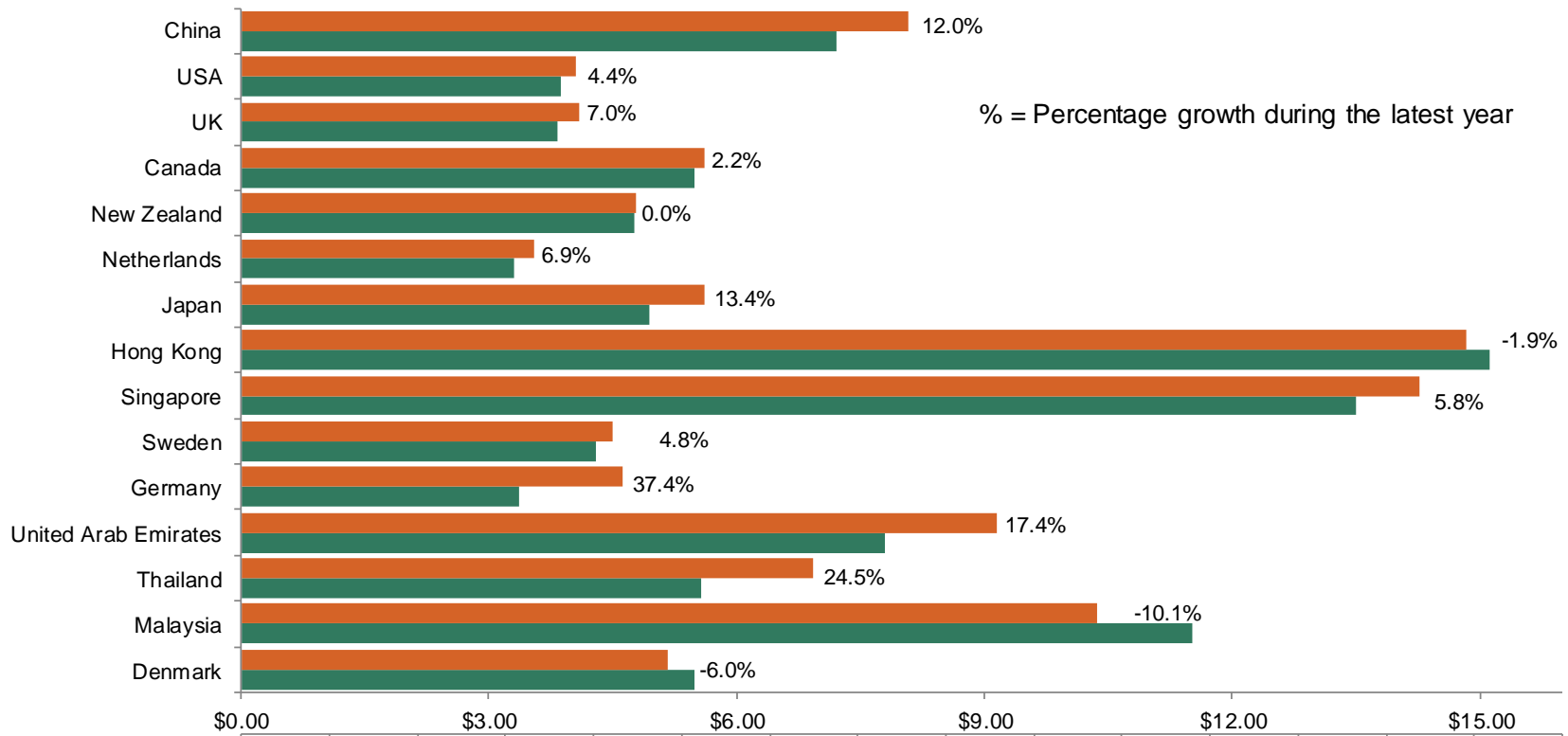
# Bottled exports by top 15 destinations

Volume (million litres) for MAT December 2018



# Bottled exports by top 15 destinations

Average value (A\$ per litre) for MAT December 2018



	Denmark	Malaysia	Thailand	United Arab Emirates	Germany	Sweden	Singapore	Hong Kong	Japan	Netherlands	New Zealand	Canada	UK	USA	China
2018	\$5.17	\$10.36	\$6.92	\$9.15	\$4.62	\$4.50	\$14.28	\$14.84	\$5.61	\$3.54	\$4.77	\$5.62	\$4.09	\$4.05	\$8.08
2017	\$5.50	\$11.52	\$5.56	\$7.80	\$3.36	\$4.29	\$13.49	\$15.13	\$4.95	\$3.31	\$4.77	\$5.50	\$3.83	\$3.88	\$7.22



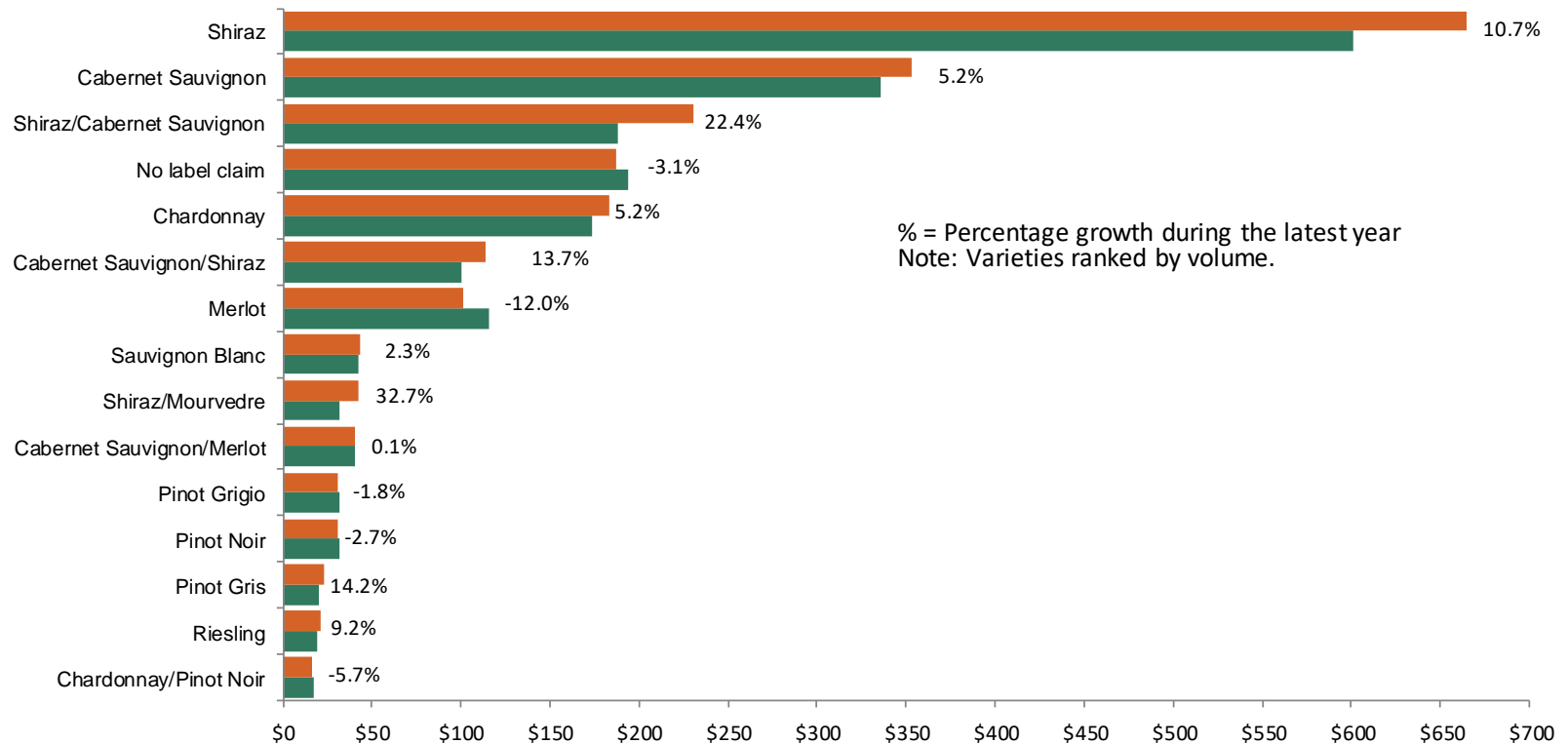
# Bottled exports by top 15 variety label claims

MAT December 2018

Top 15 variety label claims	Volume (million litres)		Value (A\$ million FOB)		Average value (\$A per litre FOB)	
	2018	Change	2018	Change	2018	Change
Shiraz	89.34	1%	665.06	11%	7.44	10%
Cabernet Sauvignon	51.19	-1%	353.50	5%	6.91	6%
Shiraz/Cabernet Sauvignon	32.83	-4%	230.74	22%	7.03	27%
No label claim	38.74	-7%	187.46	-3%	4.84	4%
Chardonnay	46.08	-2%	182.80	5%	3.97	8%
Cabernet Sauvignon/Shiraz	5.21	3%	114.15	14%	21.89	11%
Merlot	25.50	-14%	101.46	-12%	3.98	3%
Sauvignon Blanc	12.32	0%	43.47	2%	3.53	2%
Shiraz/Mourvedre	1.98	17%	42.22	33%	21.33	14%
Cabernet Sauvignon/Merlot	8.61	-2%	39.98	0%	4.64	2%
Pinot Grigio	7.83	-11%	31.22	-2%	3.99	11%
Pinot Noir	5.06	-12%	30.61	-3%	6.05	10%
Pinot Gris	6.90	7%	23.29	14%	3.38	6%
Riesling	3.53	-1%	21.19	9%	6.00	10%
Chardonnay/Pinot Noir	3.00	-4%	16.01	-6%	5.34	-2%

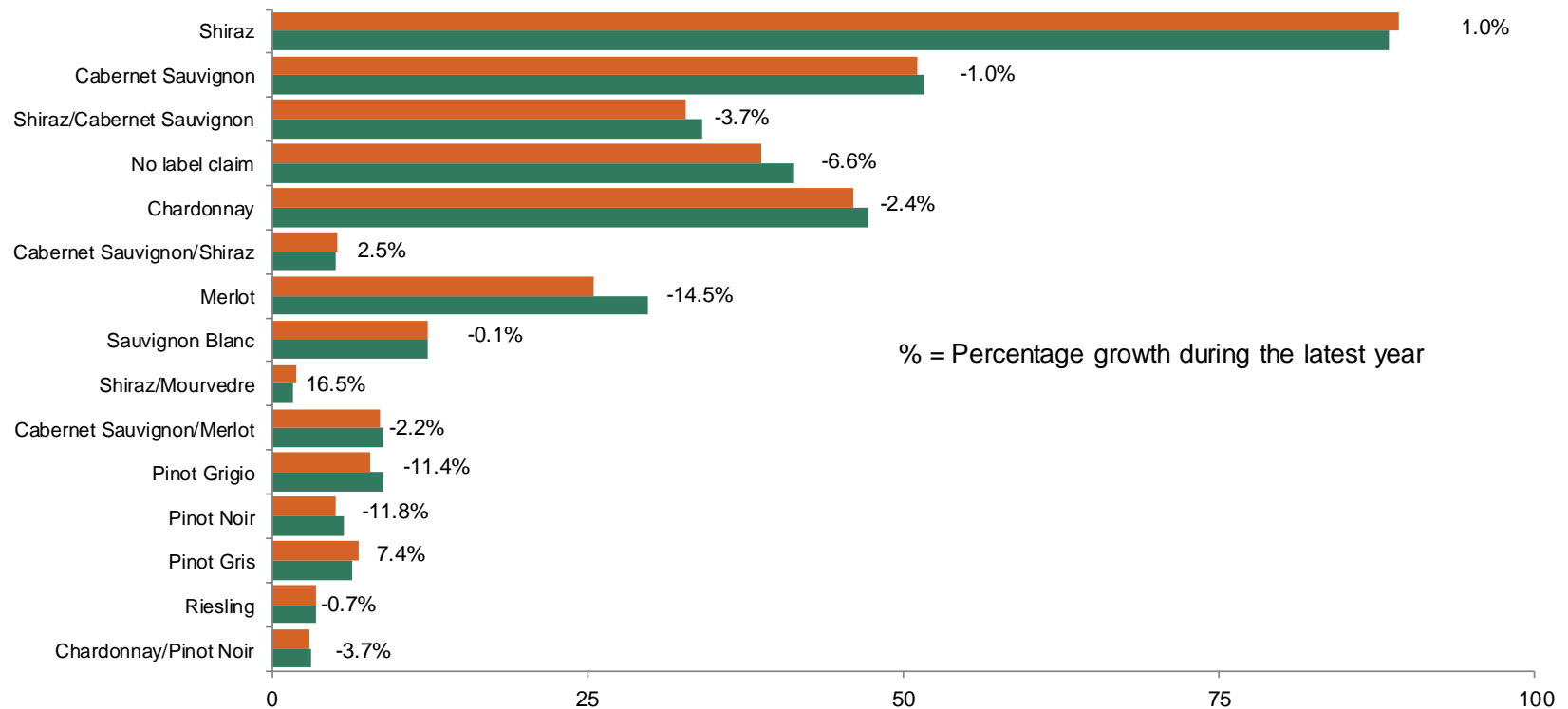
# Bottled exports by top 15 variety label claims

Value (million A\$) for MAT December 2018



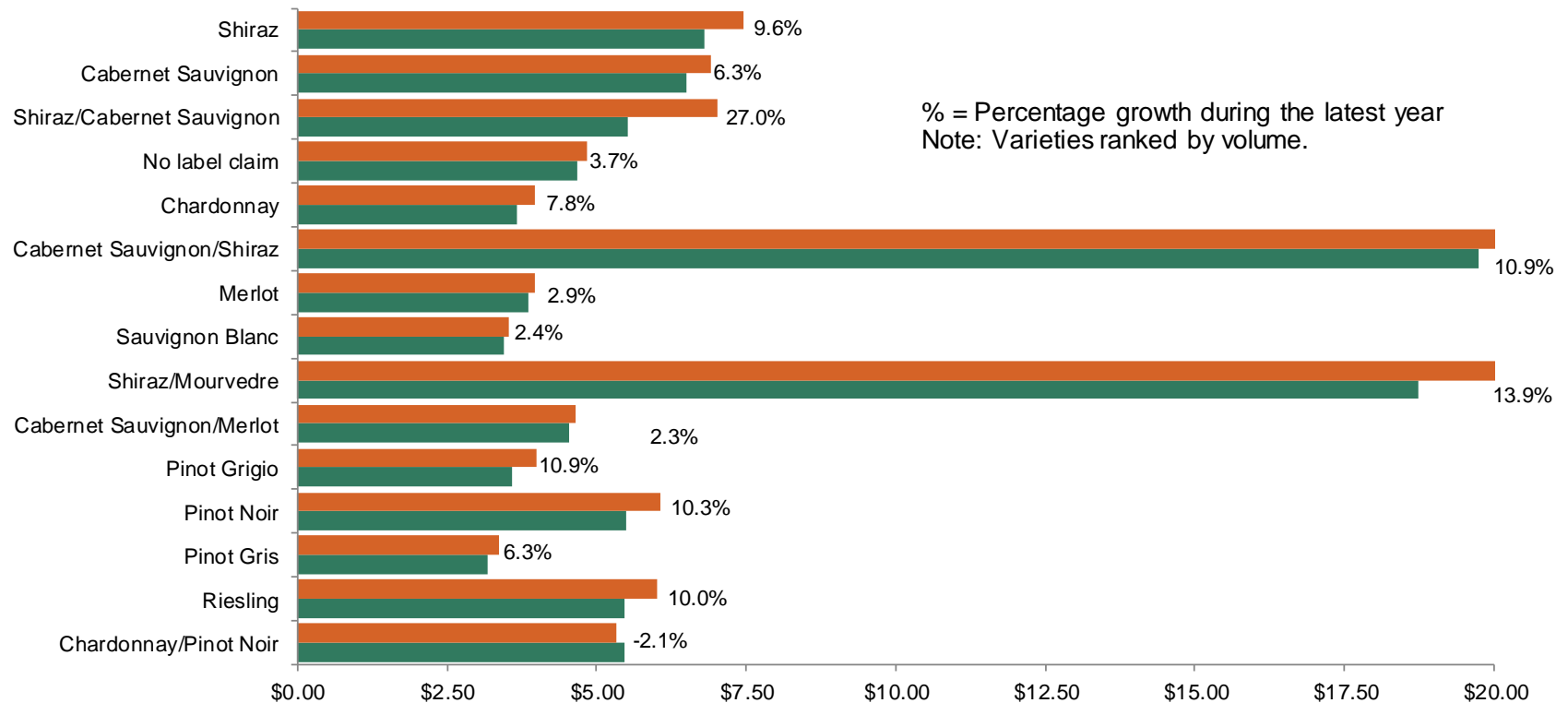
# Bottled exports by top 15 variety label claims

Volume (million litres) for MAT December 2018



# Bottled exports by top 15 variety label claims

Average Value (A\$ per litre) for MAT December 2018



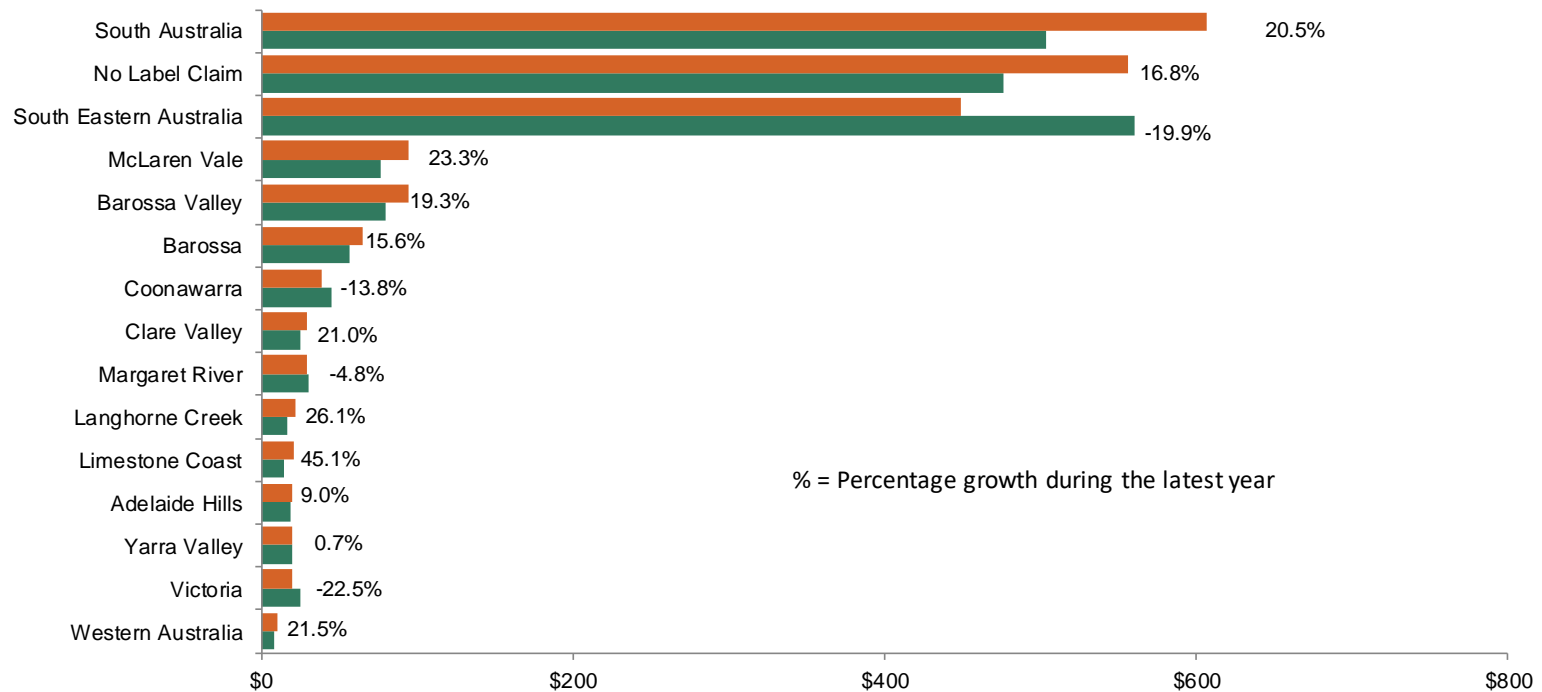
# Bottled exports by top 15 GI region label claims

MAT December 2018

Top 15 GI label claims	Volume (million litres)		Value (A\$ million FOB)		Average value (\$A per litre FOB)	
	2018	Change	2018	Change	2018	Change
South Australia	62.29	9%	607.64	20%	9.75	10%
No Label Claim	111.04	16%	556.73	17%	5.01	1%
South Eastern Australia	126.83	-22%	449.52	-20%	3.54	3%
McLaren Vale	8.01	16%	94.76	23%	11.83	6%
Barossa Valley	5.02	5%	94.54	19%	18.83	14%
Barossa	5.57	6%	65.01	16%	11.66	9%
Coonawarra	3.11	-9%	38.64	-14%	12.44	-6%
Clare Valley	3.56	21%	29.66	21%	8.32	0%
Margaret River	2.38	-4%	28.76	-5%	12.10	-1%
Langhorne Creek	2.25	10%	21.29	26%	9.46	15%
Limestone Coast	3.39	36%	21.05	45%	6.21	7%
Adelaide Hills	1.94	-4%	20.18	9%	10.40	14%
Yarra Valley	1.29	-8%	19.31	1%	14.97	9%
Victoria	2.94	-27%	19.15	-22%	6.52	6%
Western Australia	1.49	21%	9.95	21%	6.66	0%

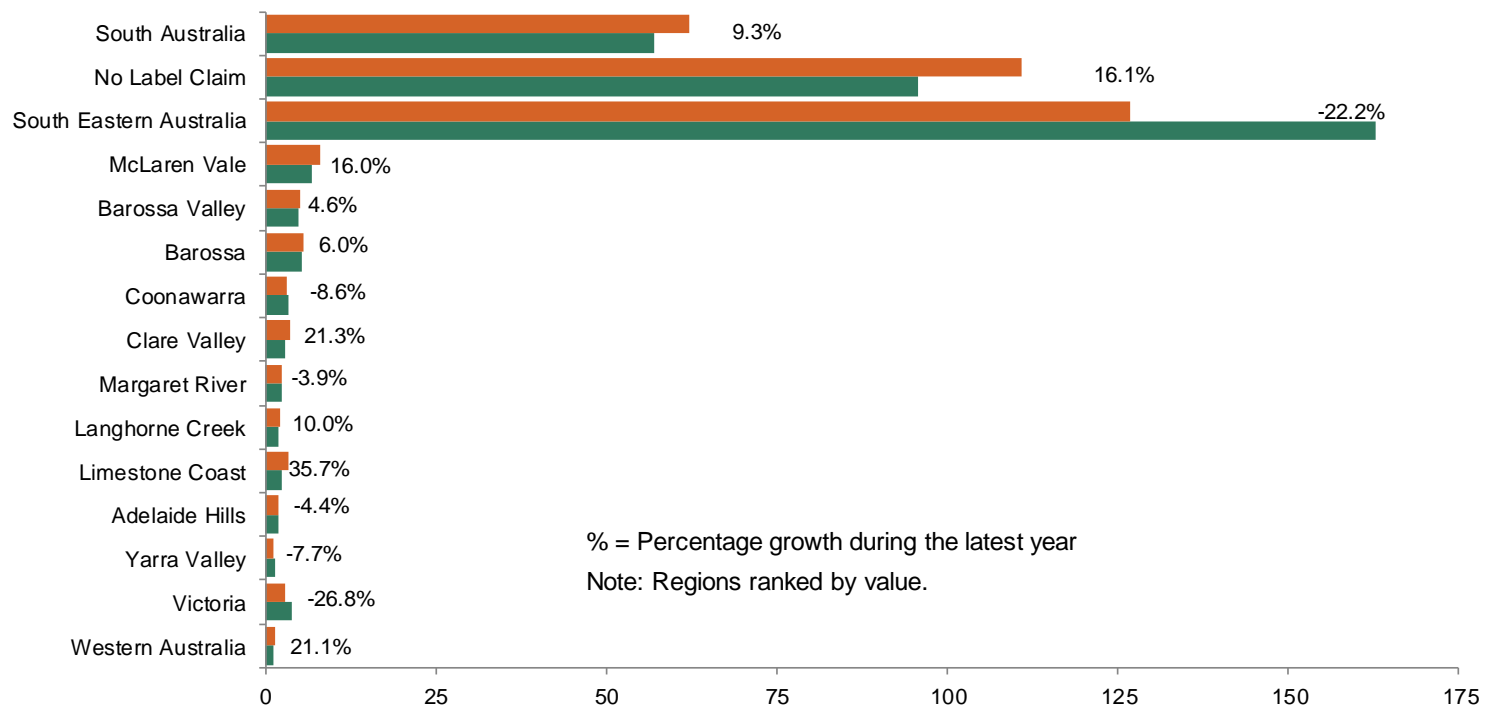
# Bottled exports by top 15 GI region label claims

Value (million A\$) for MAT December 2018



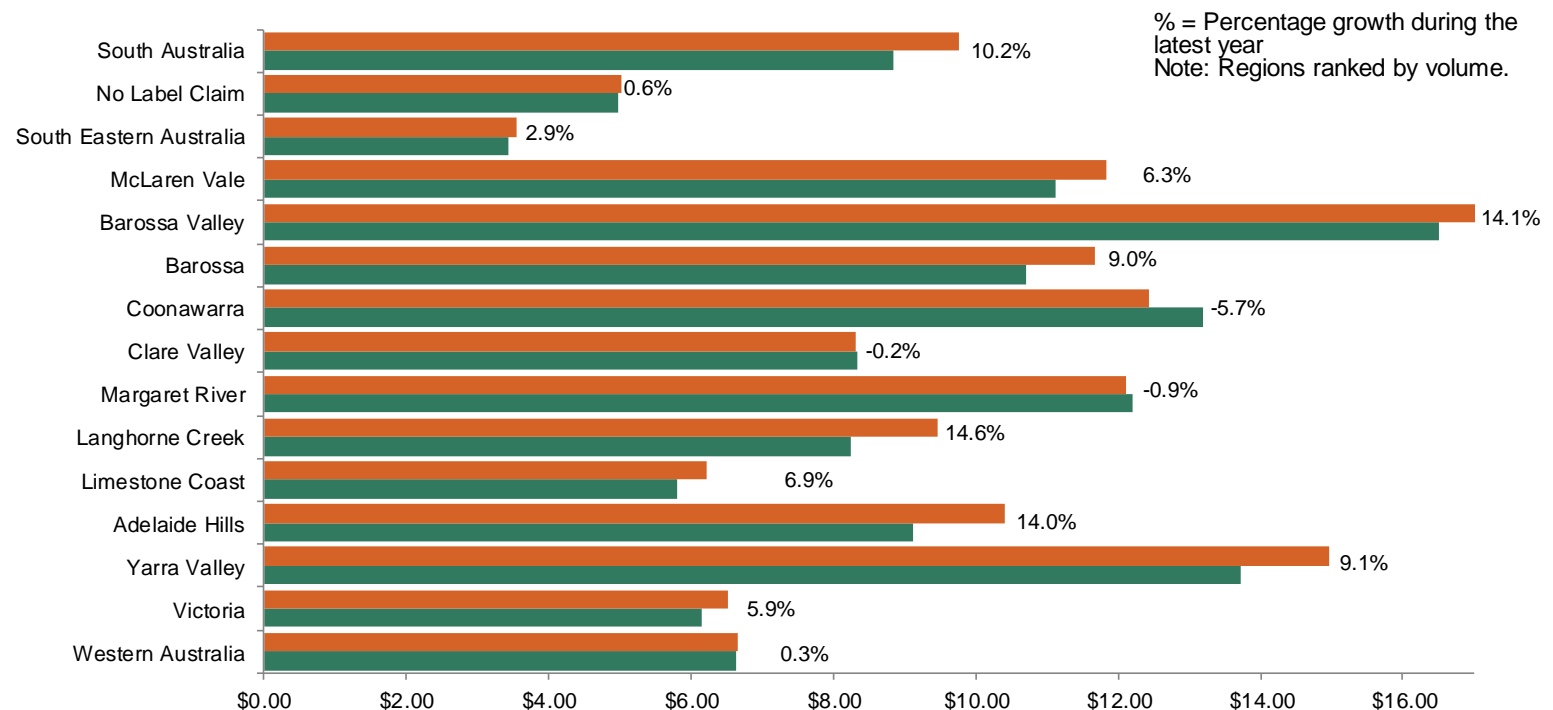
# Bottled exports by top 15 GI region label claims

Volume (million litres) for MAT December 2018



# Bottled exports by top 15 GI region label claims

Average Value (A\$ per litre) for MAT December 2018



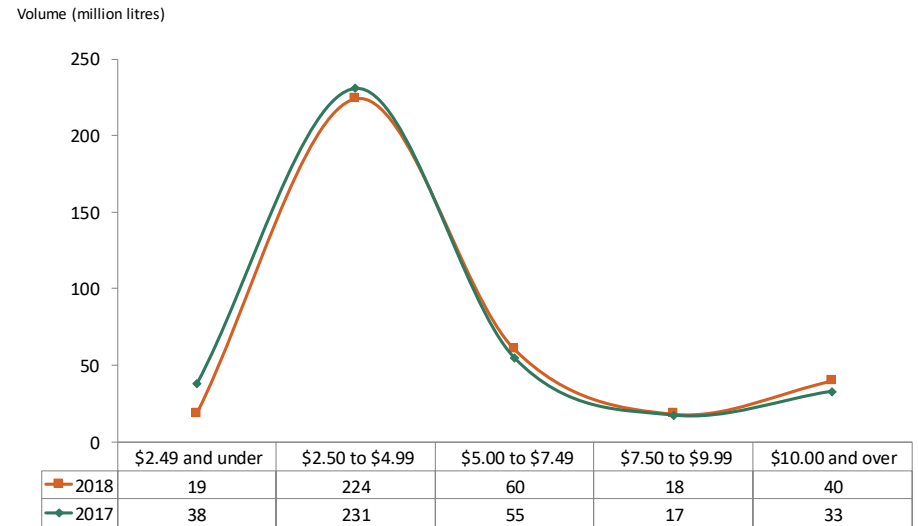


# Bottled exports by price point

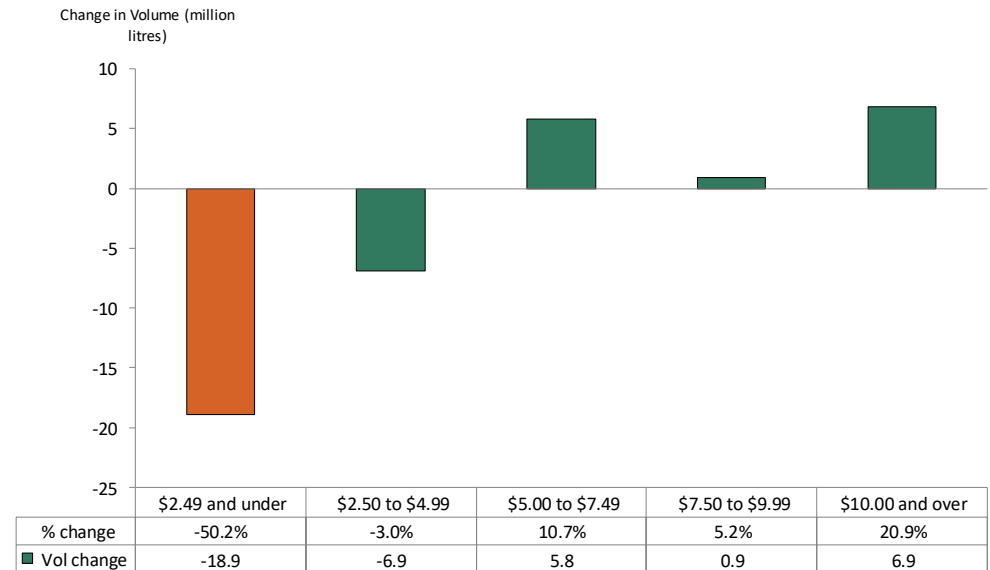
## Volume

MAT December 2018

Volume (million litres)



Change in volume (million litres)



# Unpackaged wine exports report

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# Unpackaged wine exports by price point and destination

Value ('000 A\$) for MAT December 2018

	\$0.50 and under		\$0.50 to \$1.00		\$1.00 to \$1.50		\$1.50 to \$2.00		\$2.00 to \$2.50		\$2.50 and above		Total	
	MAT December 2018 ('000 AUD)	Change %	MAT December 2018 ('000 AUD)	Change %	MAT December 2018 ('000 AUD)	Change %	MAT December 2018 ('000 AUD)	Change %	MAT December 2018 ('000 AUD)	Change %	MAT December 2018 ('000 AUD)	Change %	MAT December 2018 ('000 AUD)	Change %
UK	25	-64%	81,469	-12%	109,061	84%	11,508	84%	2,640	-28%	9,538	33%	214,241	27%
USA	35	na	39,794	-6%	27,568	4%	14,900	150%	2,233	290%	3,165	-8%	87,695	11%
China	-	na	2,219	-52%	33,326	-15%	7,463	98%	10,297	76%	33,182	615%	86,486	49%
Canada	-	na	12,033	-37%	34,114	152%	936	229%	225	89%	-	-100%	47,307	43%
Germany	-	na	12,564	-36%	19,137	83%	796	400%	780	8%	2,566	-17%	35,843	6%
New Zealand	100	41%	6,878	7%	7,113	50%	737	75%	56	-67%	6,386	297%	21,271	59%
Netherlands	-	-100%	5,182	0%	6,169	89%	847	2057%	53	na	-	-100%	12,251	43%
Denmark	16	248%	2,313	-44%	6,728	211%	926	29%	193	-29%	228	-14%	10,404	37%
Japan	-	na	2,429	45%	5,288	281%	1,107	83%	-	-100%	326	100%	9,151	125%
Belgium	-	na	4,044	-13%	3,511	104%	281	-13%	-	-100%	-	na	7,836	16%
Finland	-	na	1,915	-22%	3,431	33%	1,097	145%	398	na	404	-24%	7,245	21%
France	-	na	963	-40%	3,011	24%	1,092	205%	101	96%	80	-52%	5,248	14%
Sweden	-	na	70	-71%	794	10%	1,342	57%	722	-66%	975	406%	3,903	-5%
Thailand	-	na	505	86%	1,369	84%	216	na	-	-100%	-	na	2,089	100%
Spain	-	na	840	436%	464	5%	251	na	109	na	60	na	1,725	189%
Switzerland	-	na	842	116%	622	23%	37	-49%	110	10%	-	-100%	1,611	42%
Italy	-	na	1,152	192%	-	-100%	241	-24%	2	na	23	-39%	1,418	-82%
Norway	-	na	-	-100%	829	-9%	-	na	-	na	288	na	1,118	20%
Other	-	na	969	342%	616	72%	555	182%	172	na	476	374%	2,788	219%
Total	177	7%	176,182	-14%	263,151	48%	44,332	113%	18,091	30%	57,698	167%	559,631	27%

# Unpackaged wine exports by price point and destination

Volume ('000 litres) for MAT December 2018

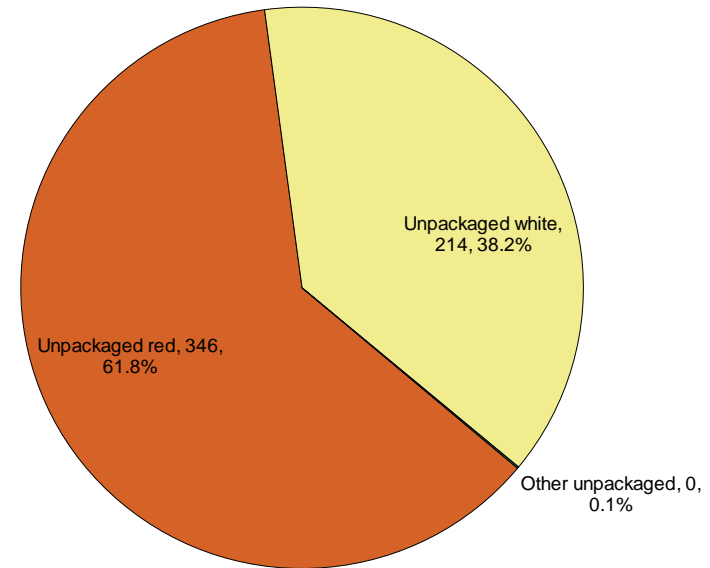
	\$0.50 and under		\$0.50 to \$1.00		\$1.00 to \$1.50		\$1.50 to \$2.00		\$2.00 to \$2.50		\$2.50 and above		Total	
	MAT December 2018 ('000 Litres)	Change %	MAT December 2018 ('000 Litres)	Change %	MAT December 2018 ('000 Litres)	Change %	MAT December 2018 ('000 Litres)	Change %	MAT December 2018 ('000 Litres)	Change %	MAT December 2018 ('000 Litres)	Change %	MAT December 2018 ('000 Litres)	Change %
UK	71	-64%	98,132	-16%	94,017	81%	6,836	89%	1,218	-27%	2,714	35%	202,988	15%
USA	76	na	44,304	-11%	22,016	0%	9,259	157%	1,104	360%	696	-27%	77,456	1%
China	-	na	2,521	-50%	27,908	-13%	4,607	109%	4,608	81%	6,994	413%	46,638	8%
Canada	-	na	14,366	-34%	29,821	144%	555	235%	110	92%	-	-100%	44,852	31%
Germany	-	na	14,150	-38%	15,613	73%	504	426%	384	7%	864	-12%	31,514	-6%
New Zealand	256	2%	9,285	-4%	5,920	46%	446	69%	24	-67%	1,214	249%	17,144	17%
Netherlands	-	-100%	6,096	-3%	5,133	79%	550	2191%	24	na	-	-100%	11,803	28%
Denmark	72	202%	2,661	-49%	5,680	173%	544	31%	83	-31%	48	-33%	9,087	14%
Belgium	-	na	4,868	-14%	3,014	96%	172	-11%	-	-100%	-	na	8,054	8%
Japan	-	na	2,688	44%	4,617	288%	638	82%	-	-100%	96	100%	8,039	126%
Finland	-	na	2,023	-20%	2,856	32%	618	151%	175	na	100	-33%	5,772	13%
France	-	na	1,080	-44%	2,560	20%	654	237%	48	87%	20	-47%	4,362	1%
Sweden	-	na	71	-73%	623	5%	753	50%	360	-65%	390	851%	2,197	-9%
Thailand	-	na	576	100%	1,078	87%	144	na	-	-100%	-	na	1,798	105%
Spain	-	na	1,152	586%	384	0%	144	na	52	na	24	na	1,756	218%
Switzerland	-	na	1,152	153%	480	18%	24	-50%	48	0%	-	-100%	1,704	73%
Italy	-	na	1,420	251%	-	-100%	144	-25%	1	na	8	-38%	1,573	-77%
Portugal	-	na	1,200	na	-	na	-	na	-	na	-	na	1,200	na
Other	-	na	144	-45%	1,159	7%	338	182%	76	na	217	673%	1,934	29%
Total	476	-9%	207,889	-17%	222,879	46%	26,930	120%	8,313	32%	13,385	120%	479,872	12%

# Unpackaged exports by colour/wine style

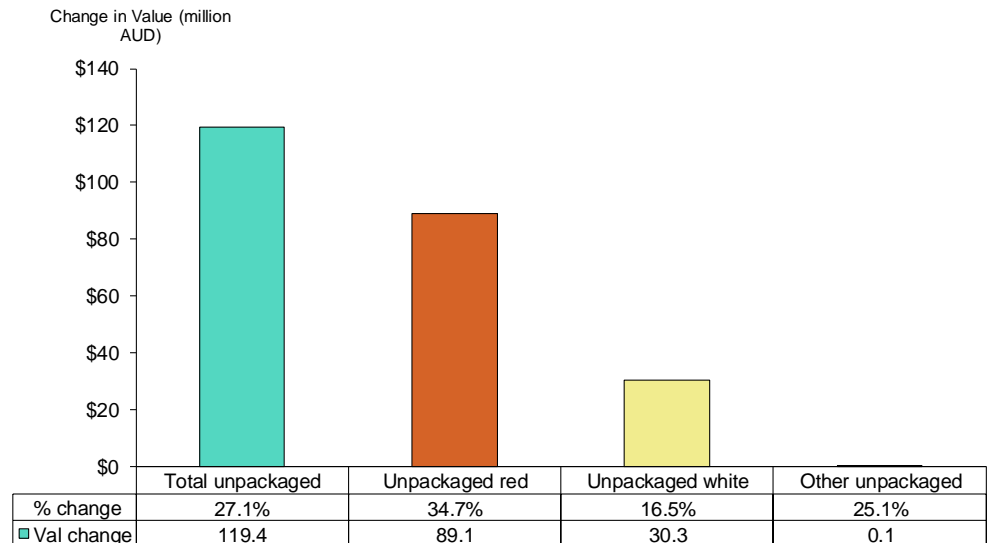
## Value

MAT December 2018

Value (A\$ million)



Change in Value (A\$ million)

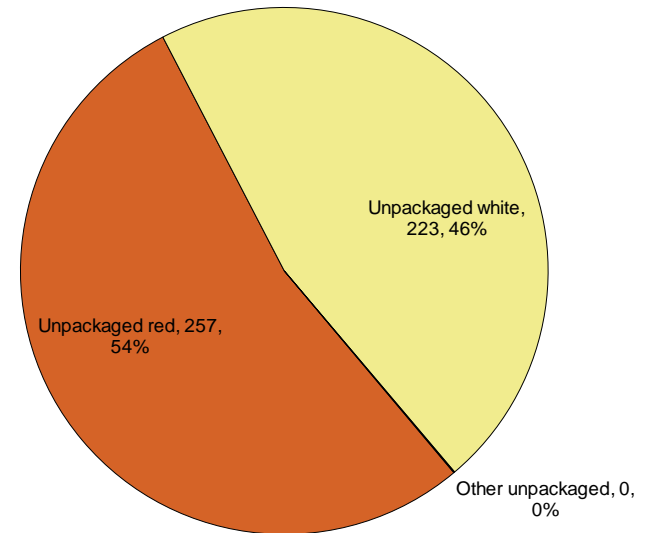


# Unpackaged exports by colour/wine style

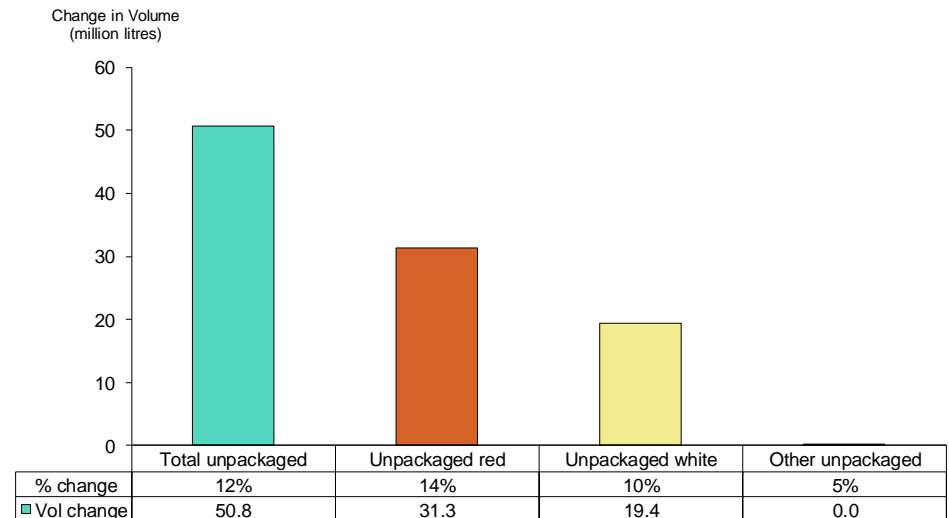
## Volume

MAT December 2018

Volume (million litres)



Change in Volume (million litres)

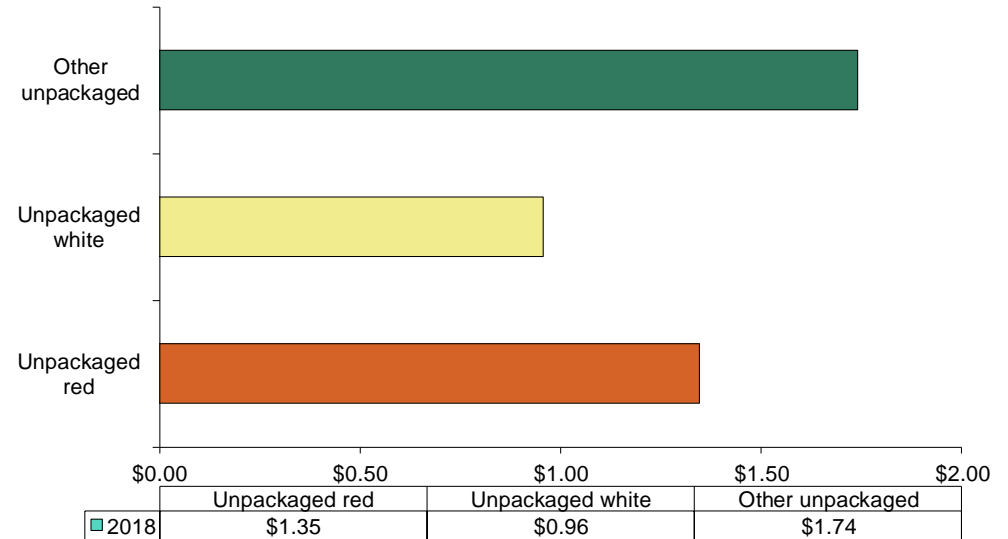


# Unpackaged exports by colour/wine style

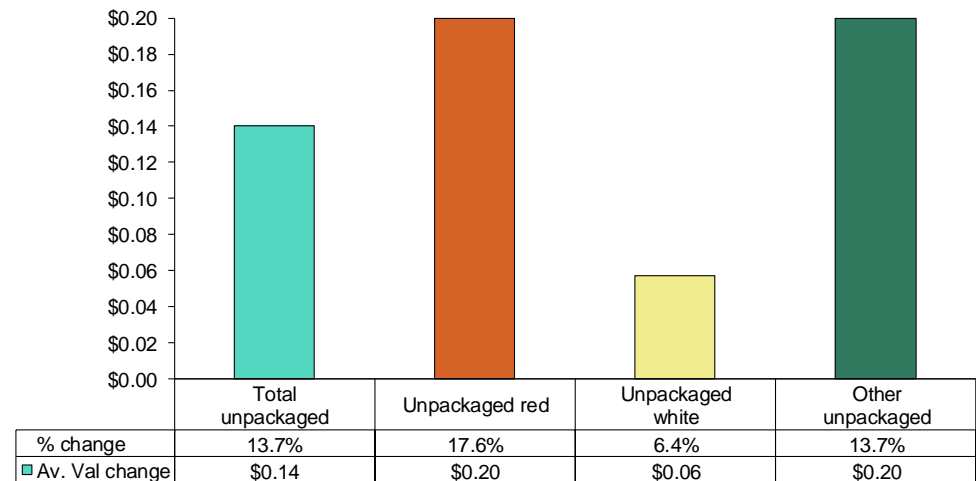
## Average value

MAT December 2018

Average value (A\$ per litre)

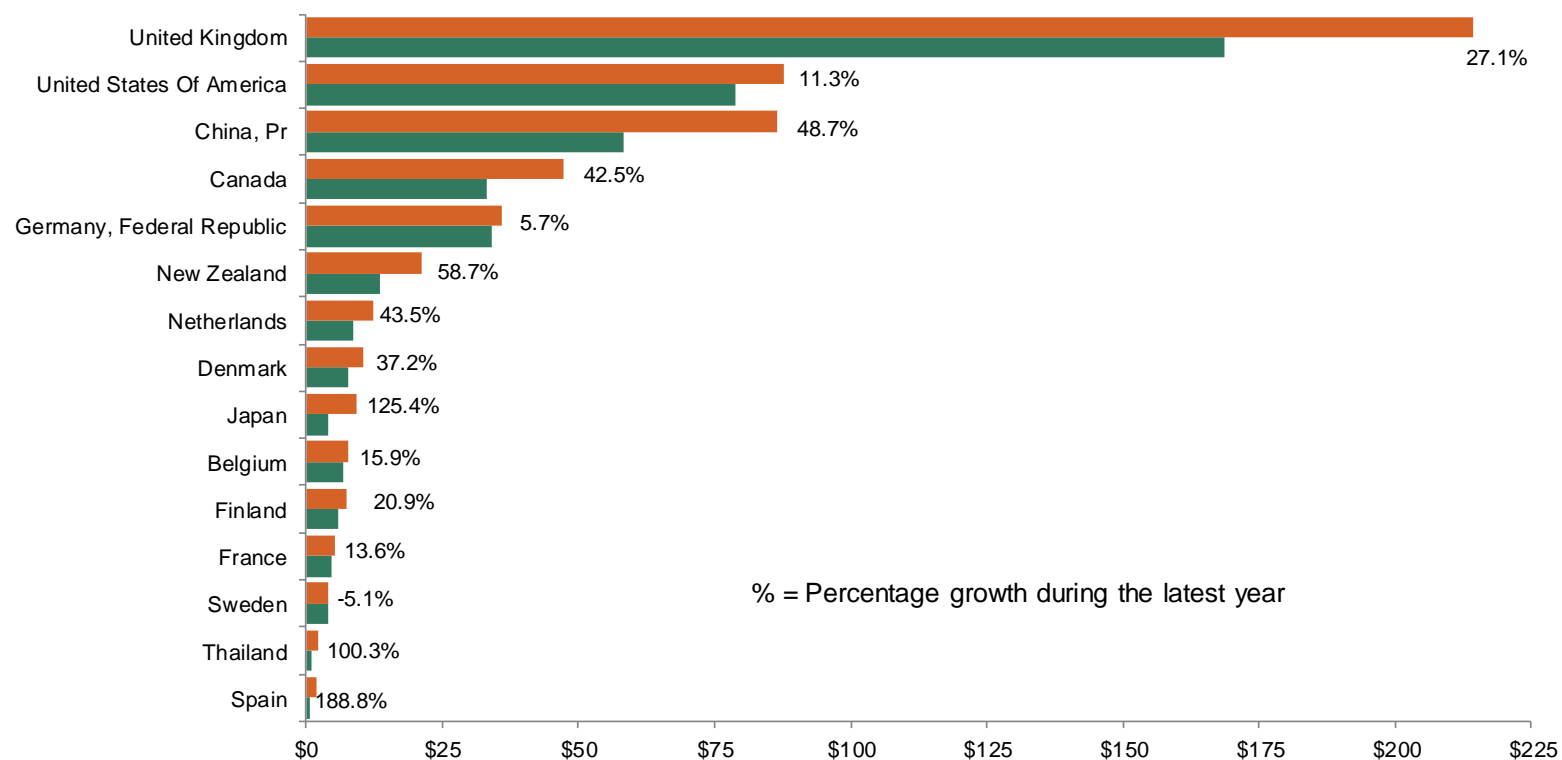


Change in average value (A\$ per litre)



# Unpackaged exports by top 15 destinations

Value (million A\$) for MAT December 2018

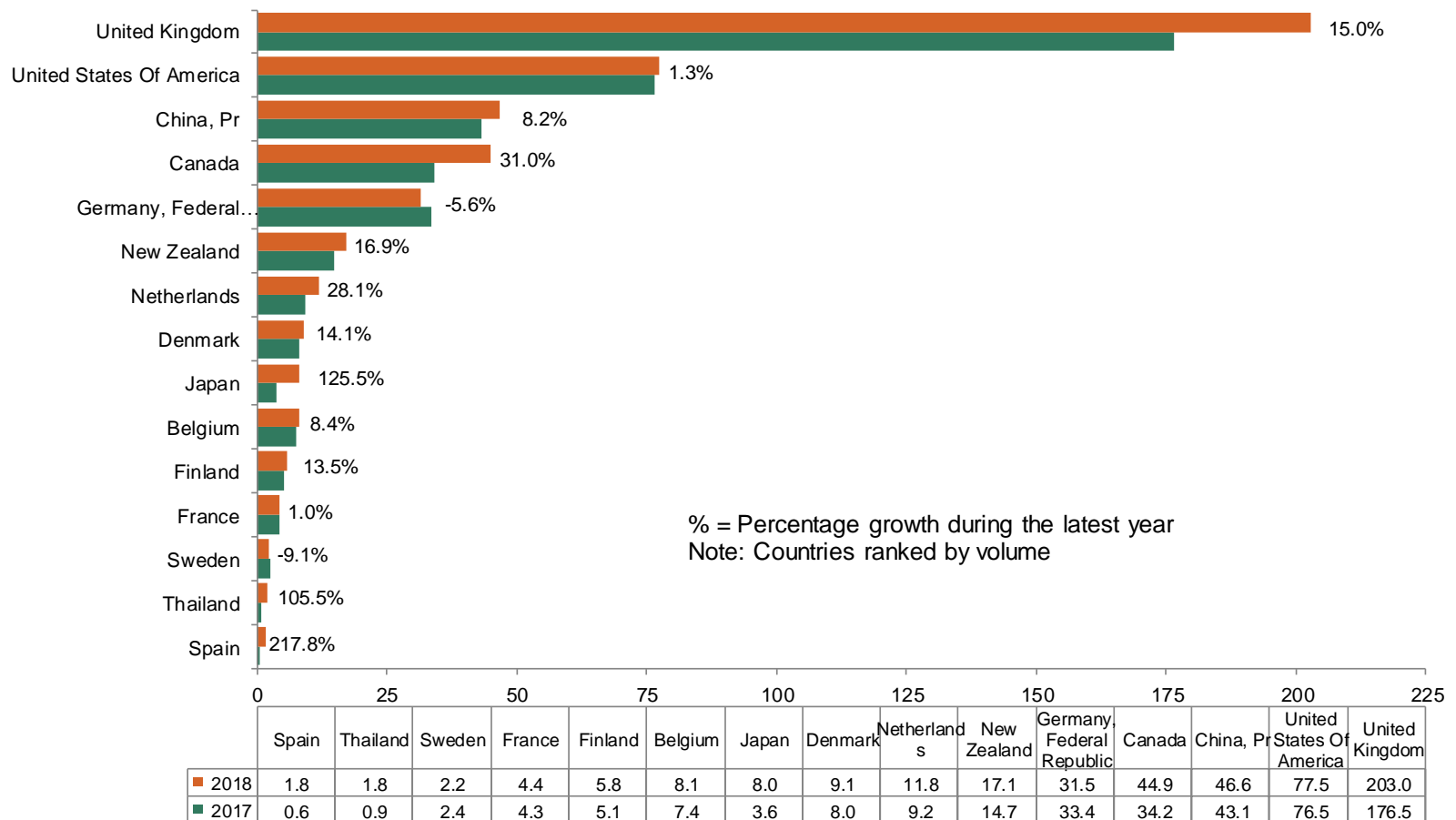


	Spain	Thailand	Sweden	France	Finland	Belgium	Japan	Denmark	Netherla nds	New Zealand	Germany , Federal Republic	Canada	China, Pr	United States Of America	United Kingdom
2018	1.7	2.1	3.9	5.2	7.2	7.8	9.2	10.4	12.3	21.3	35.8	47.3	86.5	87.7	214.2
2017	0.6	1.0	4.1	4.6	6.0	6.8	4.1	7.6	8.5	13.4	33.9	33.2	58.1	78.8	168.6



# Unpackaged exports by top 15 destinations

Volume (million litres) for MAT December 2018

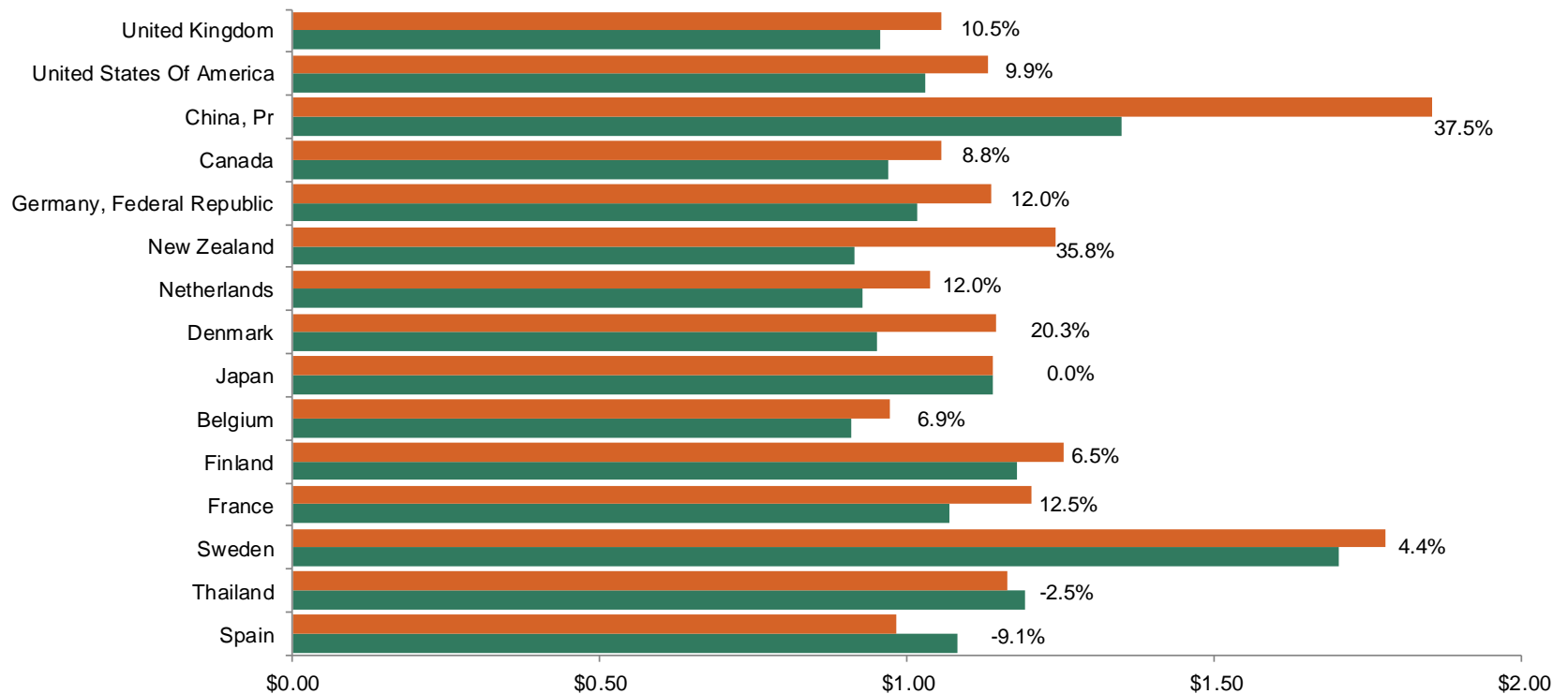


# Unpackaged exports by top 15 destinations

Average Value (A\$ per litre) for MAT December 2018

% = Percentage growth during the last year

Note: Destinations ranked by value



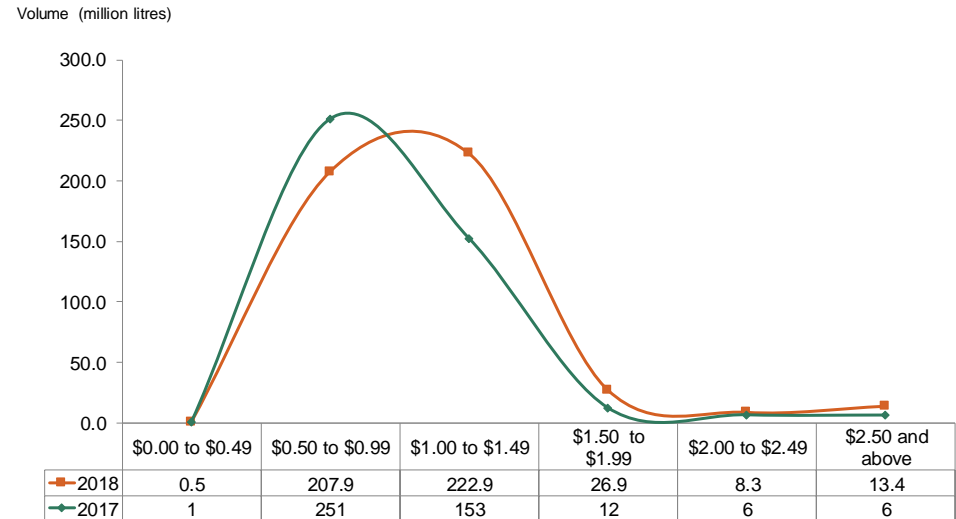
	Spain	Thailand	Sweden	France	Finland	Belgium	Japan	Denmark	Netherlands	New Zealand	Germany, Federal Republic	Canada	China, Pr	United States Of America	United Kingdom
2018	\$0.98	\$1.16	\$1.78	\$1.20	\$1.26	\$0.97	\$1.14	\$1.14	\$1.04	\$1.24	\$1.14	\$1.05	\$1.85	\$1.13	\$1.06
2017	\$1.08	\$1.19	\$1.70	\$1.07	\$1.18	\$0.91	\$1.14	\$0.95	\$0.93	\$0.91	\$1.02	\$0.97	\$1.35	\$1.03	\$0.96

# Unpackaged exports by price point

## Volume

MAT December 2018

Volume (million litres)



Change in Volume (million litres)



# Notes & Definitions

**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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- **Export Approvals:** Wine approved by the 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 A\$ 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 the Wine Australia and ABS in the method of converting the value of exports denominated in foreign currency to A\$. In the case of 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 the Wine Australia and 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 ending with 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:**  $\% \text{ Change} = ((\text{current MAT} - \text{preceding MAT}) / \text{preceding MAT}) \times 100$
- **A\$:** 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.

# Notes & Definitions (continued)

- **Still wine:** Still wine in bottles, casks, flagons or bulk containers.
- **Unpackaged:** 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 of size ranging 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.

**Wine Australia** providing insights on **Australian Wine**

Export Report