

Wine
Australia
providing
insights on
Australian
Wine

Export Report
Moving Annual Total (MAT)
To June 2019

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Summary Report

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Executive summary

- Value and average value continue to increase.
- The United States of America has experienced a return to value growth after declining in the previous year.
- Record levels achieved in both volume and value for exports above \$10 per litre.
- Value growth experienced in China, the United States of America, New Zealand, Netherlands and the United Arab Emirates.
- Overall volume declines globally due to lower production volumes, reduced demand for wine in some markets and increasing competitive pressure.
- Volume decline driven by shipments below an average value of \$2.50 per litre.

Commentary

Overview

In the year ended June 2019, Australian wine exports increased 4 per cent in value free on board (FOB) to \$2.86 billion and decreased in volume 6 per cent to 801 million litres (89 million 9-litre case equivalents). The volume decline was driven by a decrease of 7 per cent in shipments below an average value of \$2.50 per litre. This resulted in a 10 per cent increase in the overall average value of exported wine to \$3.58 per litre, the highest level since 2009.

Packaged and unpackaged wine

Wine exported in glass bottles increased in value 3 per cent to \$2.31 billion and decreased in volume 6 per cent to 353 million litres (39 million 9-litre case equivalents). The combination of the increased value and lower volume means the average value of bottled wine increased 10 per cent to \$6.54 per litre, a record value.

Other packaging formats include soft pack, which increased 13 per cent in value to \$15 million and 9 per cent in volume to 7.7 million litres, and other alternative packaging, which decreased in value 33 per cent to \$4.5 million and 36 per cent in volume to 718 thousand litres.

Shipments of unpackaged wine increased in value 6 per cent to \$533 million and decreased in volume by 6 per cent to 439 million litres (49 9-litre case equivalents). The average value of unpackaged wine exports increased 12 per cent to \$1.21.

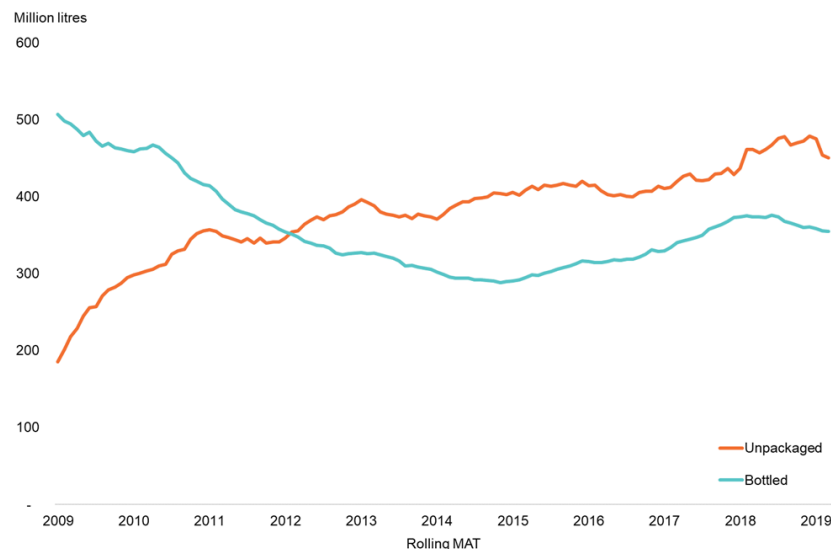
The decline in overall exported volume is due to a combination of factors:

- Australia's 2018 and 2019 vintages were smaller than the record-breaking 2017 vintage, meaning there is relatively less supply available for shipping overseas
- international supply pressures have eased with a larger 2018 global vintage, increasing competition in the market, and

- premiumisation in established wine markets around the world is pushing down volume and increasing value.

Also contributing to the decline in bottled shipments is the well-established trend for larger wine exporters to move towards bottling their wine overseas, rather than in Australia (see Figure 1). This shift is amplified when the Australian dollar is strong in comparison to other global currencies, but commercial and environmental factors are also at play; shipping in bulk containers is proven to leave a smaller carbon footprint.

Figure 1: Bottled versus unpackaged exports over time



Going forward, Australian wine supply for 2019, while well above predictions at 1.73 million tonnes, is still lower than the 2018 harvest. The good-sized crop however is anticipated to ensure Australian can continue to supply its exports comfortably.

Commentary (continued)

Exporter performance

There were 2729 active exporters in the year ended June 2019, a 19 per cent increase from the previous year. During the period, 1866 companies either started exporting or increased the value of their exports, contributing \$386 million to the growth in overall value. This growth was partially offset by 1248 exporters whose export value decreased or ceased shipment altogether; their exports declined by \$266 million.

Value growth rates by exporter size illustrate largely positive performances (see Figure 2) but nearly all exporter size groups contributed to the fall in volume. The largest exporters make up 2 per cent of the number of exporters but contribute 87 per cent of total volume of exported wine, while the smallest exporters make up 90 per cent of exporters but only 5 per cent of the volume.

Figure 2: Export growth rates by exporter size



Figure 3: Share of exporters and total volume by exporter size

Volume exported in MAT June 2019	# of exporters	Share of exporters	Million cases exported	Share of total export volume
> 100,000 9l cases	52	2%	77	87%
50,001 - 100,000 9l cases	39	1%	2.7	3%
10,001 - 50,000 9l cases	194	7%	4.0	5%
< 10,000 9l cases	2444	90%	4.9	5%
Total	2729	100%	89	100%

Price segments

In the year ended June 2019, there was robust growth in most price segments (see Figure 4). Record levels were achieved however in exports with an average value of \$10 per litre and above in both value (up 15 per cent to \$983 million) and volume (up 20 per cent 44 million litres). Wine exports valued \$5.00 and under on the other hand declined in both value and volume (down 4 per cent and 9 per cent respectively). The decline in export volume priced at \$5.00 or under was experienced across all container types except in soft packs. In general, this movement across both ends of the price segments reflects the global trend towards premiumisation.

Figure 4: Exports by price segment (million AUD FOB)

Price segment (A\$/litre)	MAT June 2019	Value change	Growth rate
\$2.49 and under	\$513	-\$37	-6.7%
\$2.50 to \$4.99	\$820	-\$17	-2.1%
\$5.00 to \$7.49	\$381	\$26	7.2%
\$7.50 to \$9.99	\$166	\$7.1	4.5%
\$10.00 to \$14.99	\$263	\$53	25%
\$15.00 to \$19.99	\$78	\$4.2	5.7%
\$20.00 to \$29.99	\$243	\$76	46%
\$30.00 to \$49.99	\$124	\$18	17%
\$50.00 to \$99.99	\$183	-\$39	-17%
\$100.00 to \$199.99	\$43	\$22	102%
\$200.00 +	\$48	-\$8.1	-14%
Total value	\$2,864	\$106	3.8%

Commentary (continued)

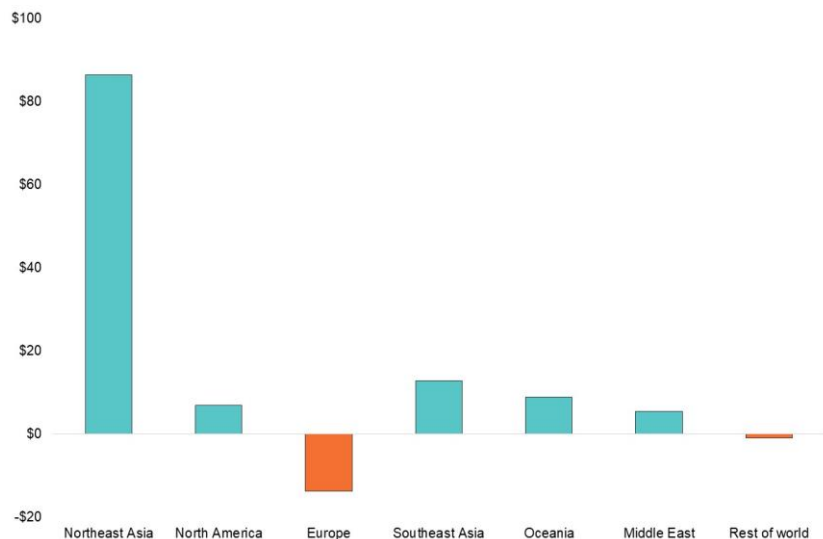
Destinations

As illustrated in Figure 5, nearly all major regions imported more Australian wine in the year ended June 2019 than the previous corresponding period. Europe is now the exception after declining by 2 per cent to \$595 million. Contributing to the decline in value from exports to Europe are the United Kingdom, Germany, Sweden and Finland.

The regions in growth are:

- Northeast Asia, 7 per cent to \$1.3 billion
- North America, 1 per cent to \$631 million
- Southeast Asia, 8 per cent to \$180 million
- Oceania, 9 per cent to \$108 million, and
- the Middle East, 18 per cent to \$35 million.

Figure 5: Value change by region (million AUD FOB)



China

Australian wine exports to China (including Hong Kong and Macau) have reached a financial year record, increasing 7 per cent in value to \$1.2 billion. Volume however decreased 16 per cent to 154 million litres (17 million 9-litre case equivalents) in the year ended June 2019.

Mainland China

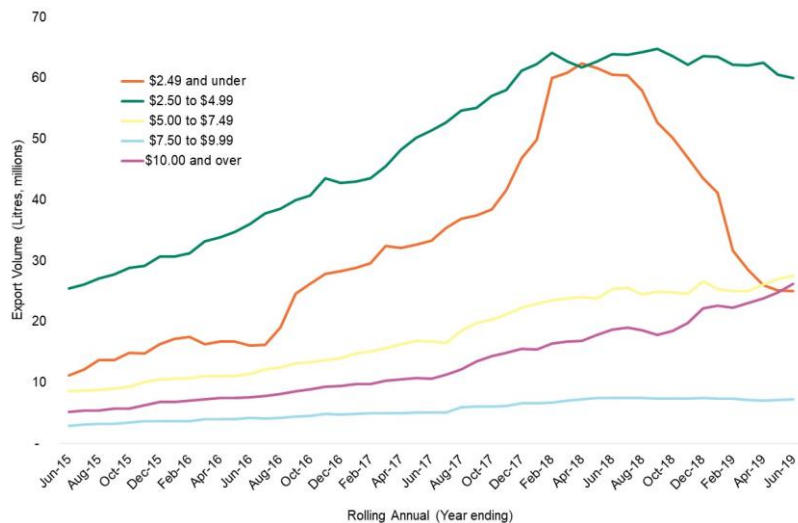
Accounting for 91 per cent of export value in the above-mentioned group, mainland China contributed to the record export value, itself reaching a financial year record. Exports to mainland China increased 8 per cent in value to \$1.09 billion and decreased 17 per cent in volume to 146 million litres (16 million 9-litre case equivalents). As depicted in Figures 6 and 7, this volume decrease is due to a decline in shipments below \$2.50 per litre. Shipments with an average value of \$10 and above increased 24 per cent to \$604 million. The decline at the bottom of the price spectrum and growth at the top has resulted in a 30 per cent increase in the average value of wine shipped to mainland China to \$7.44 per litre.

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

Price segment (A\$/litre)	MAT June 2019	Value change	Growth rate
\$2.49 and under	\$38	-\$43	-53%
\$2.50 to \$4.99	\$221	-\$5.0	-2.2%
\$5.00 to \$7.49	\$162	\$16	11%
\$7.50 to \$9.99	\$62	-\$2.7	-4.2%
\$10.00 to \$14.99	\$146	\$50	52%
\$15.00 to \$19.99	\$43	\$9.1	27%
\$20.00 to \$29.99	\$177	\$75	73%
\$30.00 to \$49.99	\$82	\$19	31%
\$50.00 to \$99.99	\$108	-\$43	-28%
\$100.00 to \$199.99	\$22.3	\$12	125%
\$200.00 +	\$27	-\$4.2	-13%
Total value	\$1,088	\$83	8.2%

Commentary (continued)

Figure 7: Exports to mainland China by price segment (million litres)



Since the previous export report, the International Monetary Fund (IMF) has cut its economic growth forecast for China to 6.2 per cent due to unstable trade conditions. Reuters also noted after the release of the May 2019 results that economic growth continues to weaken suggesting that domestic demand remains sluggish, thus impacting on imports.

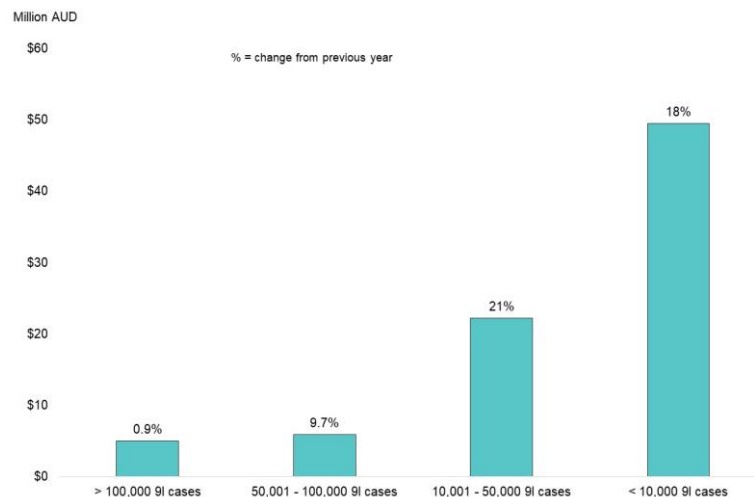
Overall wine imports into China were down 22 per cent in volume for the year ended May 2019 (Global Trade Atlas). With the exception of Chile, all major suppliers to China contributed to the decline. French wine imports were down 34 per cent, Italian by 11 per cent and Spanish by 51 per cent. Exports from Chile increased by 13 per cent, driven by bulk wine. Chile is the number one bulk wine exporter to China with Australia in second place.

Australia is well-placed in China, currently sitting behind Chile and France in volume and second to France in value. In the bulk wine segment, Australia faces tough competition particularly from Chilean wine after good harvests and a favourable exchange rate.

Bottled imports from Australia have remained steady. Australia's imported market share has jumped 13 percentage points since 2015 to 24 per cent based on volume; compounded by the recent contraction of the total import market.

Stuart Barclay, Wine Australia's General Manager Marketing, said "With global uncertainty around trade disputes, reduced Chinese growth forecasts and an overall reduction of wine imports, the Chinese market is maintaining a robust position for Australian wines. Australian fine wine priced at more than \$10 per litre FOB has now reached record financial levels. Continued weakness remains in the bulk market and we have continued to see a decline in pure bulk shipments due to foreign exchange benefits and cheaper Chilean commodity bulk. Packaged product however has seen robust growth and Australia has consolidated its position as a key provider of premium and fine wines to the Chinese market".

Looking at exporter performance in mainland China (Figure 8), all exporters to China have experienced growth, especially the smallest size bracket, growing by the largest absolute value (\$50 million) and growth rate (18 per cent). Nationally, the growth in value was 8 per cent.



Commentary (continued)

North America

United States of America

After peaking in value in year ending June 2007 and in decline since then for several year-on-year periods, the value of exports to the USA appear to be slowly turning around. For year ended June 2019, exports to the USA increased 2 per cent in value to \$432 million, although down 4 per cent in volume to 153 million litres (17 9-litre case equivalents). Average value increased 6 per cent to \$2.83 per litre. There were increases in value across most major price segments, with the notable exception being from \$15.00 to \$19.99 (see Figure 9). The stand-out segment for growth was at \$7.50 to \$9.99, with some major companies moving products into the higher price bracket contributing to growth. There was also exceptional growth in exports between \$50.00 to \$200.00.

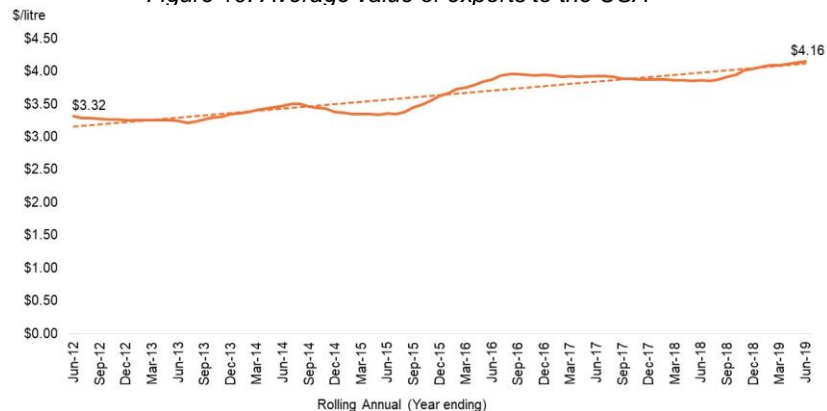
At the commercial end, unpackaged wine accounted for 45 per cent of exports to the US and declined by 3 per cent in volume but grew 5 per cent in value.

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

Price segment (A\$/litre)	MAT June 2019	Value change	Growth rate
\$2.49 and under	\$88	\$2.8	3.3%
\$2.50 to \$4.99	\$261	-\$0.7	-0.3%
\$5.00 to \$7.49	\$23	\$1.5	6.9%
\$7.50 to \$9.99	\$19	\$5.0	35%
\$10.00 to \$14.99	\$18	\$0.5	2.7%
\$15.00 to \$19.99	\$7.7	-\$2.5	-24%
\$20.00 to \$29.99	\$5.4	\$0.1	1.7%
\$30.00 to \$49.99	\$4.8	-\$0.1	-1.2%
\$50.00 to \$99.99	\$3.2	\$0.9	39%
\$100.00 to \$199.99	\$1.3	\$0.5	71%
\$200.00 +	\$0.2	-\$0.7	-79%
Total value	\$432	\$7.4	1.7%

Pleasingly, although the volume of bottled wine shipped to the USA has declined, principally at lower price points, the average value of exports has been on an upward trend, growing on average 3 per cent per year since 2012 (see Figure 10). This reflects a higher premium being paid on Australian wine.

Figure 10: Average value of exports to the USA



The solid export results are also starting to be seen in retail sales. Australian wine remains in positive territory in the USA off-trade market, growing 1 per cent in value to US\$522 million in the year ended March 2019. Even more encouraging is that Australian wine priced above US\$25 per bottle has grown 10 per cent along with wines priced between \$8.00 - \$10.99, up 37 per cent (IRI Worldwide). There is also positive news in the USA on-trade for Australian wine; it has increased 4 per cent in value to US\$275 million in the year ending March 2019 (Nielsen CGA).

Aaron Ridgway, Wine Australia's Regional General Manager Americas, said "The US is the toughest market in the world in which to sell wine. The year ending June 2019 growth, albeit modest, is a very positive sign. Australian wine is viable in both retail and on-premise channels and continues to offset declines in volume with value increases – enduring evidence that the category is repositioning according to our strategy. A net gain of 15 exporters for the period is also noteworthy. The barriers to entry in the US remain extraordinarily high, and more producers need to enter the market for Australian wines to attain critical market share".

Commentary (continued)

Canada

Australian wine exports to Canada declined marginally in value to \$198 million while volume declined by 4 per cent in volume to 66 million litres (7.3 million 9-litre case equivalents) in the year ended June 2019. The average value of exports increased by 3 per cent to \$3.00 per litre. Both bottled and unpackaged wine exports declined in volume, down by 4 per cent and 3 per cent respectively. There was growth across several price bands (see Figure 11), particularly in wines at \$10.00 to \$14.99 per litre and above, which increased in value by 13 per cent to \$20 million.

Figure 11: Exports to Canada by price segment (million AUD FOB)

Price segment (A\$/litre)	MAT June 2019	Value change	Growth rate
\$2.49 and under	\$43	\$0.3	0.7%
\$2.50 to \$4.99	\$43	-\$3.6	-7.7%
\$5.00 to \$7.49	\$69	\$1.1	1.7%
\$7.50 to \$9.99	\$18	\$0.3	1.5%
\$10.00 to \$14.99	\$20	\$2.2	13%
\$15.00 to \$19.99	\$2.0	-\$0.5	-19%
\$20.00 to \$29.99	\$1.3	-\$0.3	-21%
\$30.00 to \$49.99	\$1.2	-\$0.1	-7.3%
\$50.00 to \$99.99	\$0.5	-\$0.1	-18%
\$100.00 to \$199.99	\$0.1	-\$0.1	-49%
\$200.00 +	\$0.1	-\$0.01	-7.4%
Total value	\$198	-\$0.8	-0.4%

Europe

United Kingdom

The United Kingdom is the third biggest wine market in the world and the biggest destination for Australian wine exports by volume. Exports to the United Kingdom (UK) decreased 3 per cent in value to \$373 million and 4 per cent in volume to 236 million litres (26 million 9-litre case equivalents). Average value increased 1 per cent to \$1.58 per litre. The volume decline reflects that some of the larger brands have wrapped up their pre-Brexit strategies of getting additional product into market pre-Brexit to mitigate any disruption to exports.

Unpackaged exports, which represent 84 per cent of Australian wine volume exported to the UK, increased in volume by 1 per cent and 8 per cent in value. Bottled exports on the other hand declined by 22 per cent in volume and 14 per cent in value. Despite this, exports with an average value of \$5.00 and \$7.49 increased, along with shipments valued between \$7.50 to \$9.99 per litre (see Figure 12).

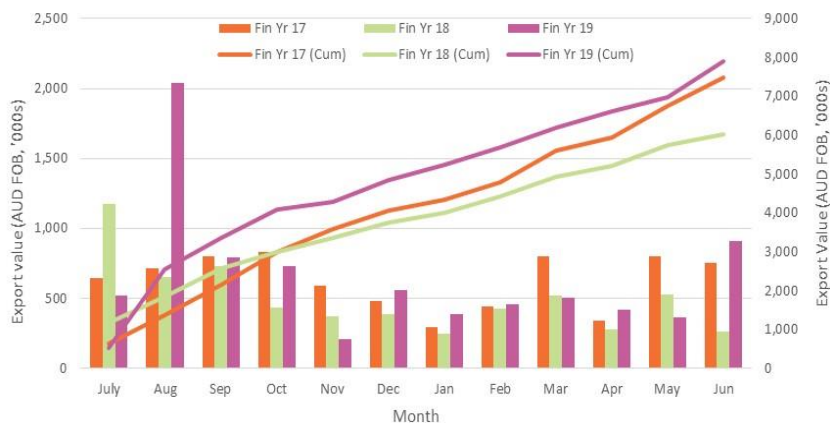
Figure 12: Exports to the UK by price segment (million AUD FOB)

Price segment (A\$/litre)	MAT June 2019	Value change	Growth rate
\$2.49 and under	\$208	\$1.2	0.6%
\$2.50 to \$4.99	\$103	-\$16	-13%
\$5.00 to \$7.49	\$25	\$1.5	6.5%
\$7.50 to \$9.99	\$14	\$3.0	27%
\$10.00 to \$14.99	\$11	-\$1.2	-10%
\$15.00 to \$19.99	\$3.7	-\$0.7	-17%
\$20.00 to \$29.99	\$3.3	\$0.4	15%
\$30.00 to \$49.99	\$3.0	\$0.9	41%
\$50.00 to \$99.99	\$1.5	\$0.5	57%
\$100.00 to \$199.99	\$0.2	-\$0.3	-62%
\$200.00 +	\$0.5	-\$0.4	-43%
Total value	\$373	-\$11	-2.9%

Commentary (continued)

The strongest growth came at \$20 to \$100 per litre. This segment is showing positive signs on a month by month basis with value trending upwards throughout the financial year period and June 2019 volume reaching levels higher than those achieved in 2017 (see Figure 13).

Figure 13: Exports to the UK for wines between \$20.00 to \$99.99 per litre by month and cumulative (cum)



Data provided by IRI shows that Australia was ranked number one in still wine off trade sales in the UK in the 12 months ended March 2019 with a market share of 24 per cent in volume and 23 per cent in value. Off-trade sales in the UK for Australian wine grew 1 per cent in the year ended March 2019 to £1.2 billion. The key areas of growth were wine priced between £5.01–7.00 per bottle (up 1 per cent), £8.01–9.00 (up 10 per cent, and £10.01–20.00 (up 4 per cent) (IRI Worldwide). Australia has the highest share (30 per cent) in the £5.01–6.00 per bottle segment. Further to this, Nielsen have just reported that Australia has three of the top five brands in the retail sector.

Laura Jewell MW, Wine Australia’s Regional General Manager EMEA, said ‘As previously reported, the UK trade is still in a state of hiatus, waiting for the political scene to settle down and the new prime minister to turn his attentions to Brexit negotiations. The larger brands continue to hold stock above their usual levels, although lower than the first quarter stockpiled levels. The exchange rate is holding up, but the economy lost momentum in the second quarter and economic activity contracted sharply in April, mainly due to car manufacturing. On the positive side unemployment is at a multi-decade low and wage growth outpacing inflation is feeding through to solid retail sales. Elsewhere in Europe there are positive signs in Belgium, Netherlands, Denmark and Norway, and we will continue our focus on the Nordics with our roadshow in October’.

An overview of the Nordic Roadshow 2019 markets is below.

Denmark - Australian wine exports increased, up by 14 per cent in value to \$25 million and 20 per cent in volume to 12 million litres. The growth in exports was driven by both ends of the price spectrum, with exports below \$2.50 growing 40 per cent in value and exports above \$10 growing 12 per cent.

Norway - Export value and volume increased, up 10 per cent to \$6 million and up 6 per cent to 1.9 million litres. The growth was experienced across both bottled and unpackaged exports. This growth however was not consistent across all major price segments with only increases within \$2.50 to \$4.99 and \$7.50 to \$9.99.

Sweden – Export value declined by 7 per cent in value to \$22 million and down 10 per cent in volume to 5.9 million litres. This decline was experienced across both bottled and unpackaged. There was year on year growth though in the \$2.50 to \$4.99 per litre and \$7.50 to \$9.99 per litre price segments.

Finland – Export value declined by 12 per cent to \$15 million and down 15 per cent in volume to 6.4 million litres. With fewer exports across both bottled and unpackaged formats, this flowed through to declines in all major price categories except for \$5.00 to \$7.49.

Commentary (continued)

Other destinations

In the year ended June 2019, exports to *Singapore* remained relatively steady for value and volume at \$87 million and 6.4 million litres. While the results did not change greatly, there was large growth from exports with an average value between \$2.50 to \$4.99 per litre increasing 15 per cent to \$7.3 million, \$7.50 and \$9.99 per litre increasing 54 per cent in value to \$8.4 million, and between \$30.00 and \$49.99 per litre increasing from \$7 million to \$9 million to make up 10 per cent of all exports to Singapore. These increases were offset by declines in all other price bands.

Exports to *Japan* experienced a decline in value of 4 per cent to \$51 million despite volume increasing 12 per cent to 17 million litres. The volume decline was due to significant growth in unpackaged exports which overtook bottled exports in the past twelve months to make up 47 per cent of all exports. This is the result of the cut to all tariffs on bulk wine, effective from 15 January 2015 through the Japan-Australian Economic Partnership Agreement (JAPEA). Tariffs on bottled wine will not be eliminated until 1 April 2024. The value of bottled exports declined by 14 per cent to \$36 million driven declines across all major price segments except for \$7.50 to \$9.99 per litre.

South Korea is another market with a free trade agreement in place with Australia. Coming into force on 12 December 2014, the 15 per cent tariff was immediately eliminated. In the past financial year, Australian wine exports to South Korea increased by 10 per cent in value to \$18 million. With volume increasing at a slower pace to value, up by 8 per cent to 3 million litres, the average value has grown 2 per cent to \$6.23 per litre. The growth in value came from most price segments except for \$2.50 to \$4.99 per litre.

Thailand imported more Australian wine during the period, growing 57 per cent in value to \$28 million and 70 per cent in volume to 6 million litres. The growth came from across the price spectrum, with all major price segments experiencing growth.

In the past 12 months, Australian wine exports to the *Netherlands* increased 25 per cent in value to \$44 million but declined 1.3 per cent in volume to 19 million litres. Unpackaged making up more than half (55 per cent) of Australian exports, was the cause of the fall in export volume, down 10 per cent. There were increases however all other major price segments.

Exports to *Belgium* increased in both value and volume (up 19 per cent to \$18 million and 18 per cent to 11 million litres respectively). While the value of bottled wine exports remained steady, the growth came from unpackaged wine. All major price segments grew as well, except for exports between \$2.50 to \$4.99 per litre.

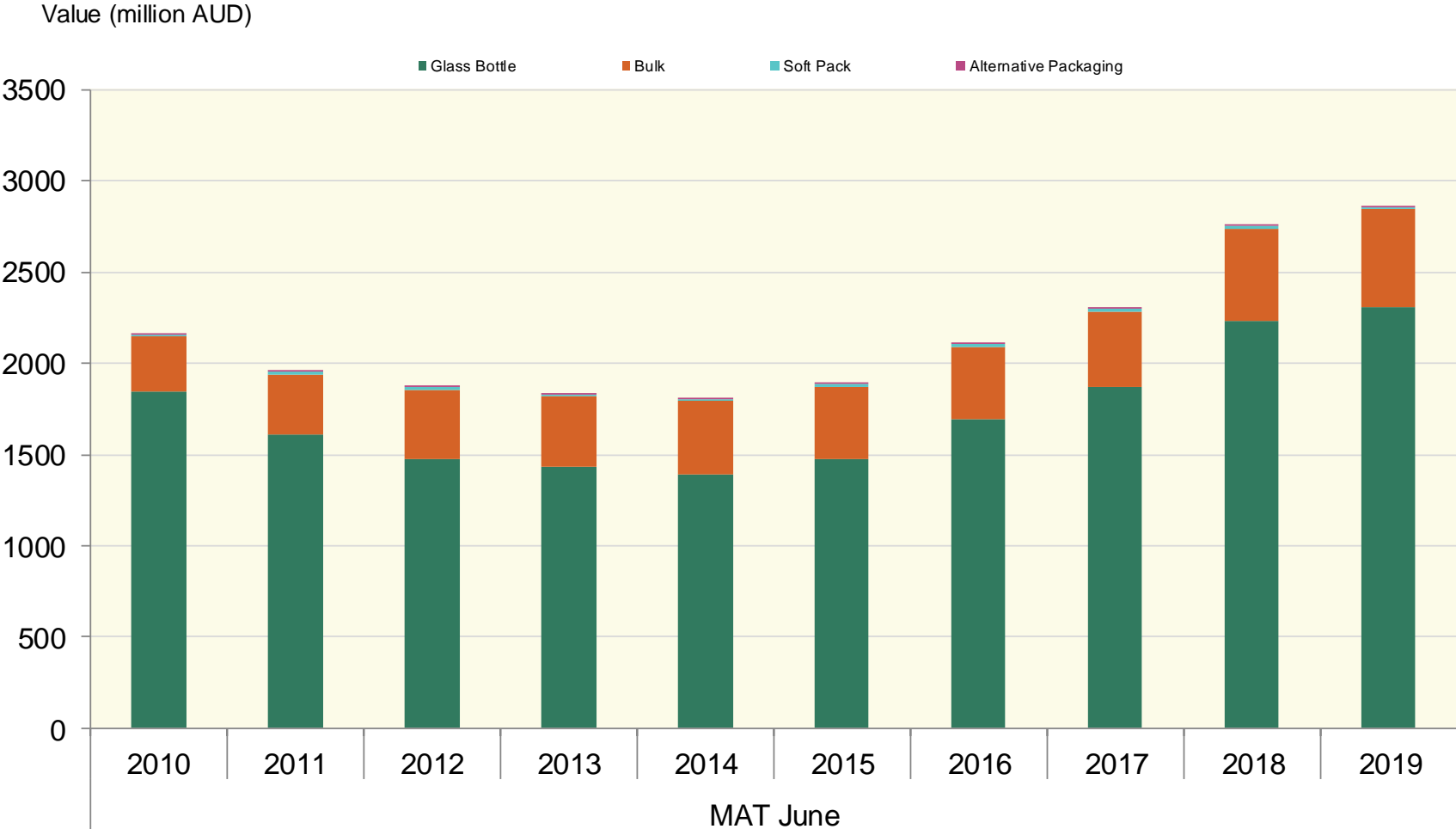
Variety performance

Some of Australia's most popular varieties experienced excellent growth in the last 12 months. Making up 30 per cent of overall export value, straight bottled Shiraz increased by 9 per cent in value to \$701 million. This was also the highest financial year on record. Straight bottled chardonnay represented 8 per cent of export value and grew by 3 per cent to \$186 million. Cabernet Sauvignon, the second most popular straight bottled variety at 15 per cent, declined by 6 per cent to \$349 million (Page 33). Other bottled variety label claims which experienced growth included:

- Shiraz/Cabernet Sauvignon, 23 per cent to \$254 million,
- Shiraz/Mourvedre, 17 per cent to \$47 million,
- Pinot Grigio, 8 per cent to \$33 million,
- Pinot Noir, 1 per cent to \$31 million, and
- Durif, 21% to \$4 million.

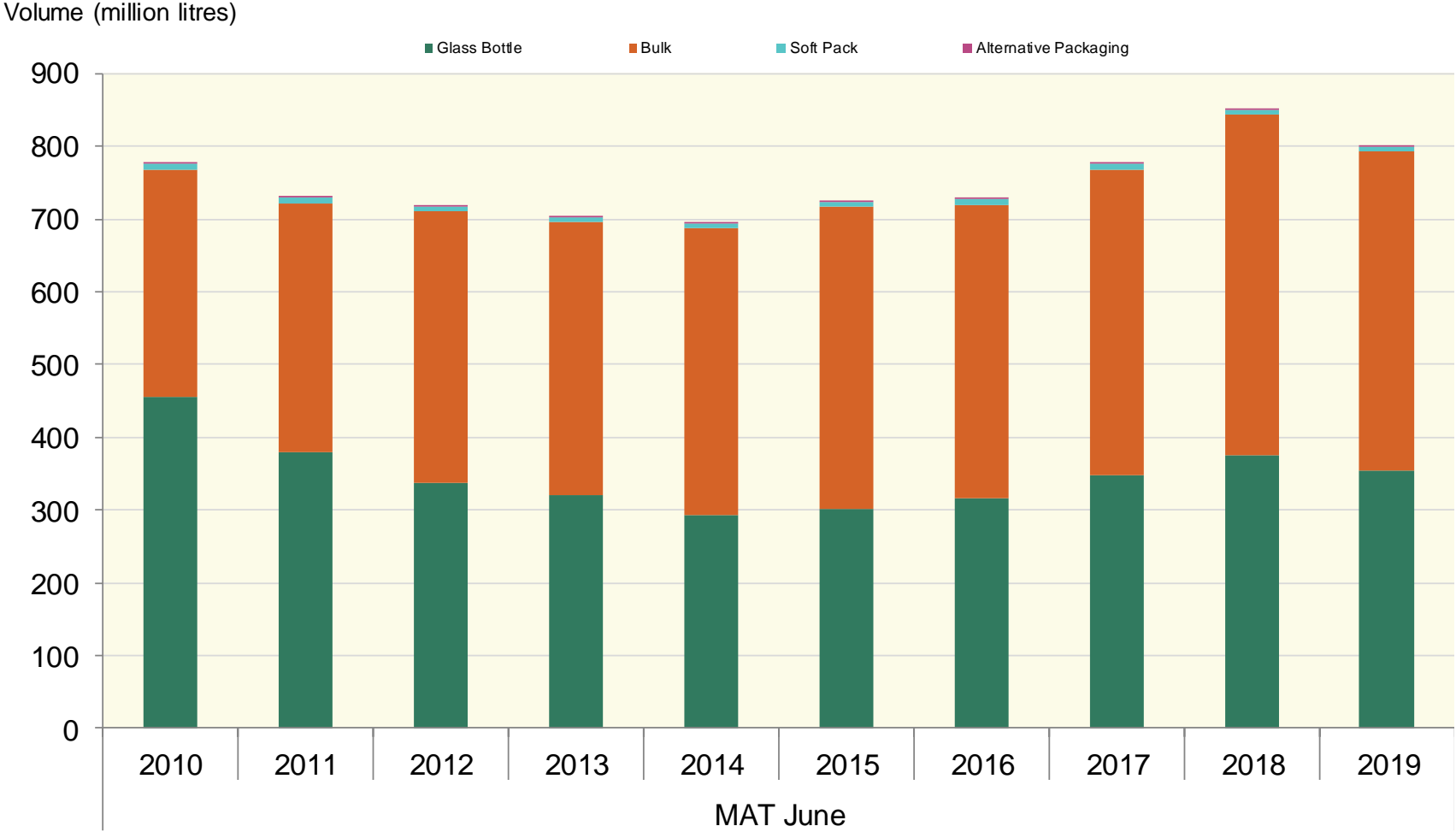
Historic overview of exports

Value by container type in A\$ million



Historic overview of exports

Volume by container type ('000 litres)

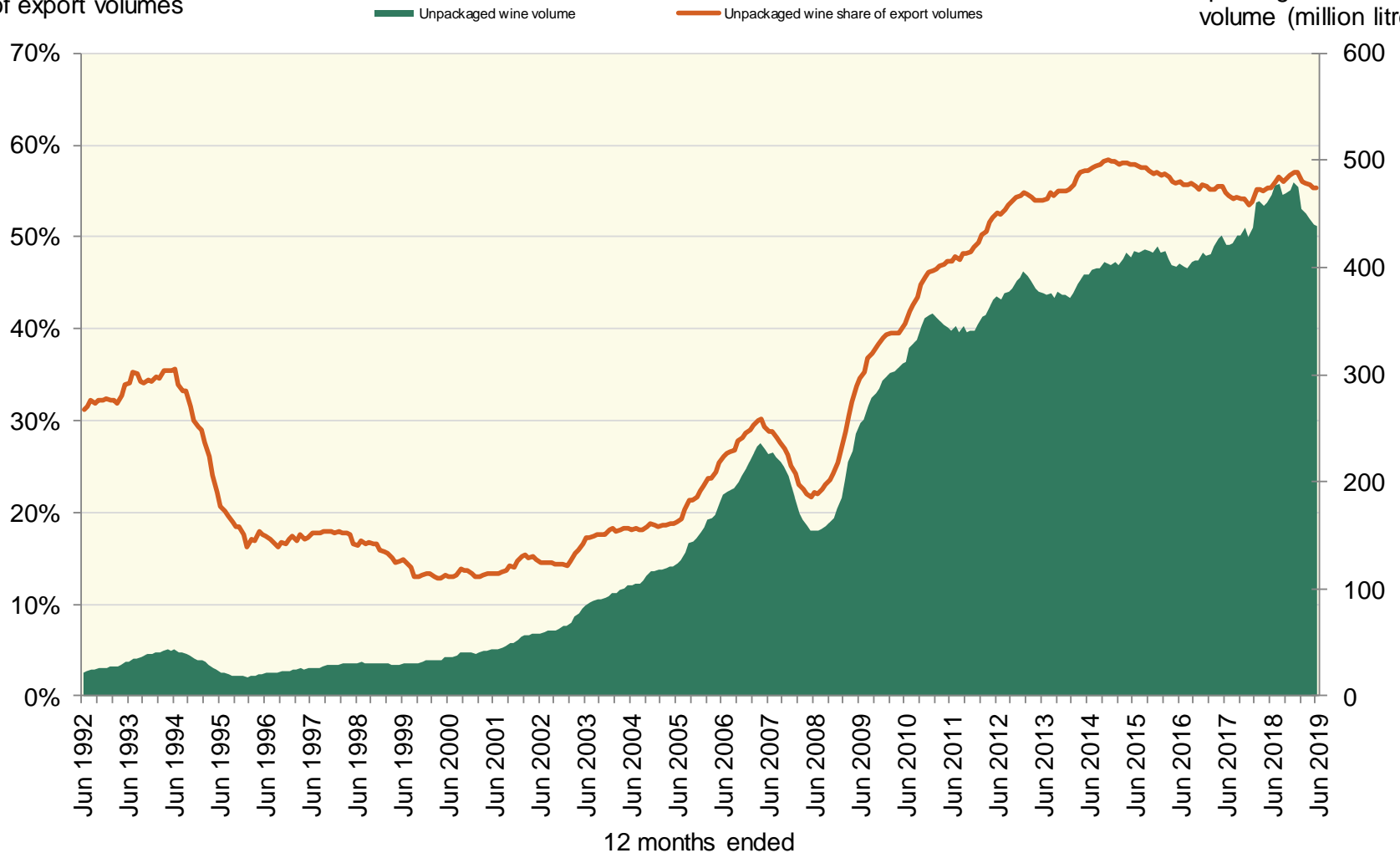


Historic overview of exports

Unpackaged share of export volumes

Unpackaged wine share
of export volumes

Unpackaged wine export
volume (million litres)



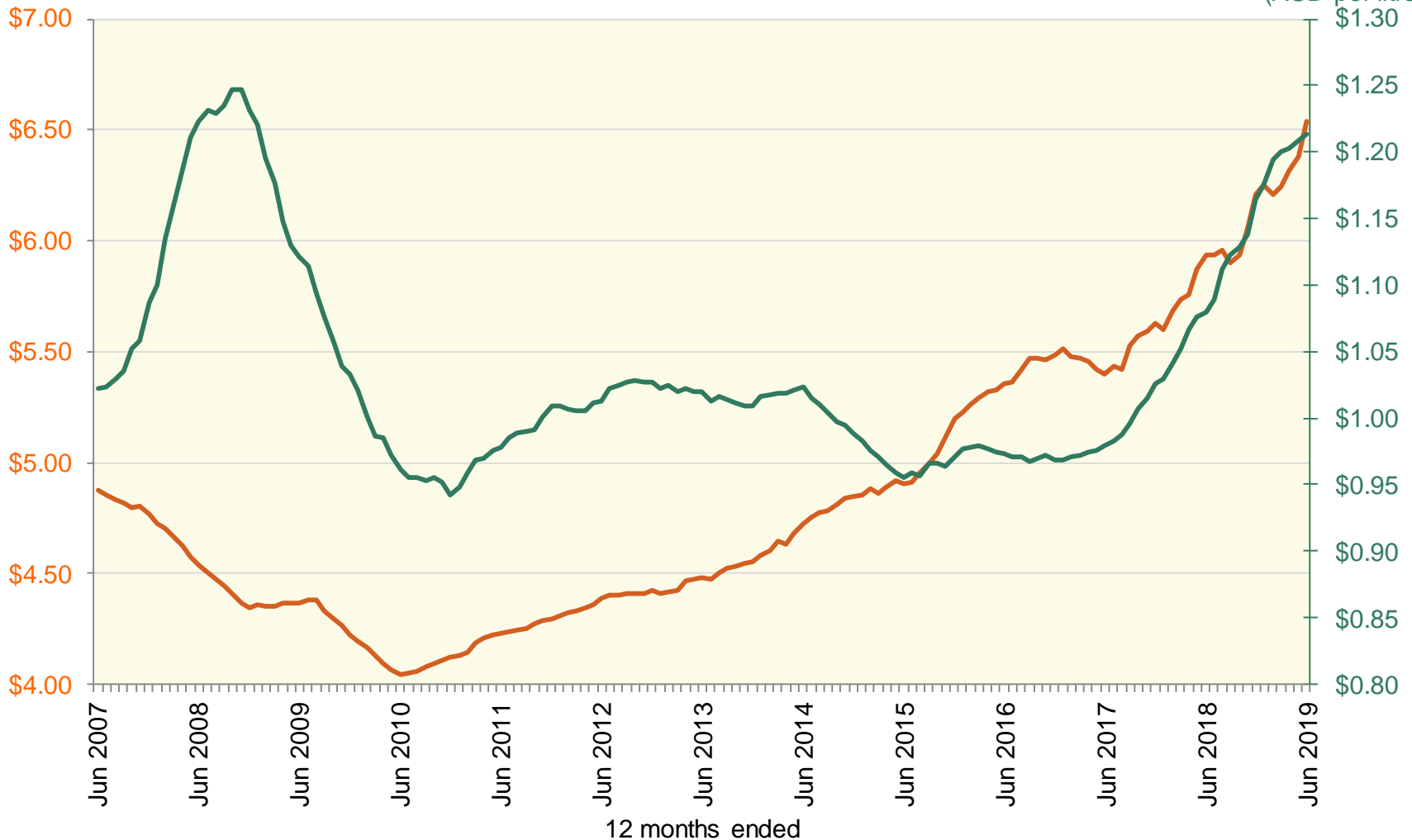
Historic overview of exports

Average value of exports

Bottled average value
(AUD per litre)

— Bottled — Unpackaged

Unpackaged average value
(AUD per litre)

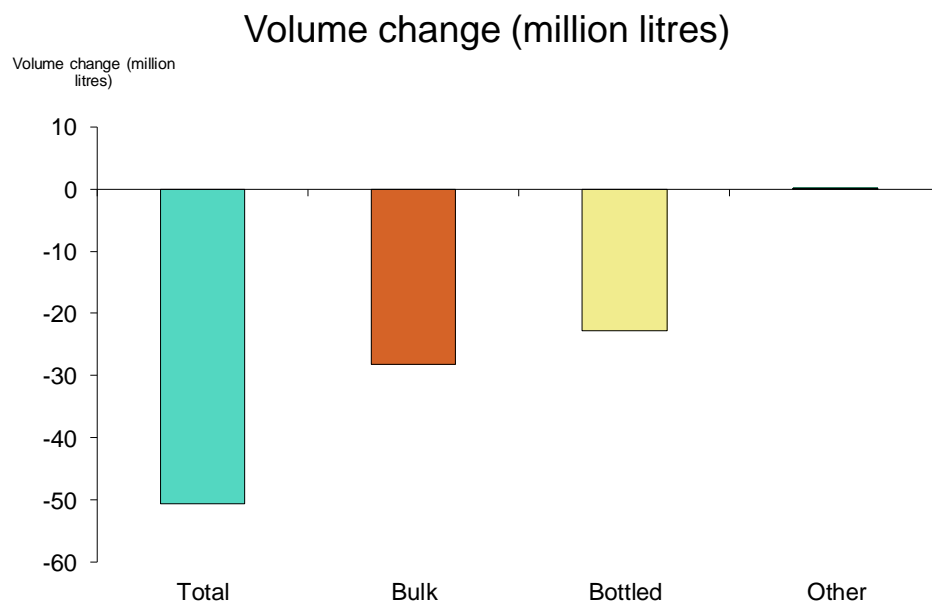
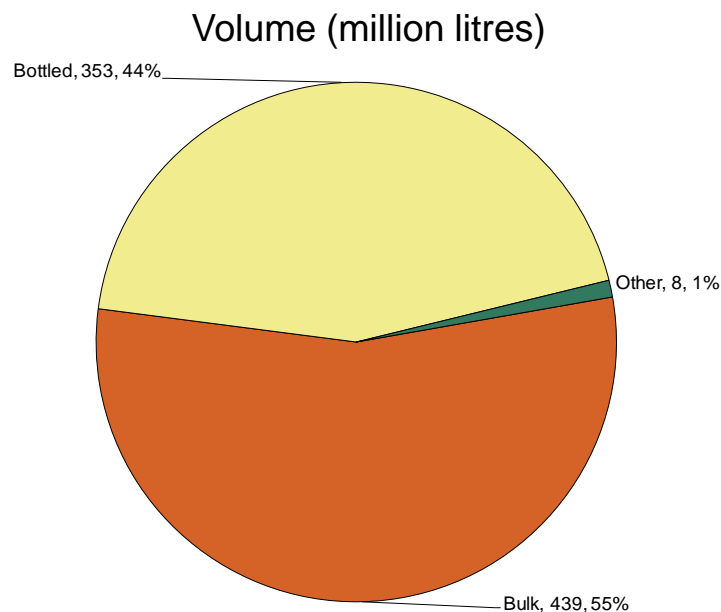


Exports by container type

MAT June 2019

		Volume (ML)	Value (A\$M FOB)	Average Value (A\$/L FOB)
Bottled	2019	353	2,311	6.54
	Change Share	-6% 44%	3% 81%	10%
Bulk	2019	439	533	1.21
	Change Share	-6% 55%	6% 19%	12%
Other	2019	8	20	2.33
	Change Share	2% 1%	-2% 1%	-5%
Total	2019	801	2,864	3.58
	Change Share	-6% 100%	4% 100%	10%

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



Wine exports

by country, container and colour

Value for MAT June 2019

	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 June 2019 (A\$ '000s)	Change %	MAT June 2019 (A\$ '000s)	Change %	MAT June 2019 (A\$ '000s)	Change %	MAT June 2019 (A\$ '000s)	Change %	MAT June 2019 (A\$ '000s)	Change %	MAT June 2019 (A\$ '000s)	Change %	MAT June 2019 (A\$ '000s)	Change %	MAT June 2019 (A\$ '000s)	Change %	MAT June 2019 (A\$ '000s)	Change %
China, Pr	978,240	11%	65,597	-11%	639	-24%	24,583	-19%	2,927	-12%	56	-28%	10,462	31%	5,194	6%	1,087,699	8%
United States Of America	204,664	-3%	35,146	15%	0	-100%	141,759	15%	45,259	-2%	0	-100%	4,195	9%	981	-89%	432,004	2%
United Kingdom	89,745	-18%	132,683	6%	0	na	61,604	-13%	81,516	11%	0	na	5,877	58%	1,250	-1%	372,676	-3%
Canada	103,471	-2%	17,282	-7%	416	-55%	44,895	3%	25,345	15%	930	-51%	3,546	-12%	2,100	16%	197,986	0%
Hong Kong	97,777	-2%	35	13%	1,597	-5%	8,745	29%	0	na	292	19%	2,645	88%	881	18%	111,972	2%
New Zealand	52,923	4%	13,537	32%	896	43%	10,291	5%	7,877	9%	454	-32%	5,449	-24%	4,825	++	96,253	9%
Singapore	73,158	0%	0	na	226	-42%	7,058	-1%	0	na	123	20%	6,082	4%	517	-27%	87,164	0%
Japan	18,135	-22%	6,179	49%	2,446	3%	9,863	-14%	3,655	65%	943	-11%	5,434	21%	4,365	2%	51,021	-4%
Germany, Federal Republic	10,484	-36%	19,003	-14%	0	na	2,621	-52%	17,159	19%	0	na	156	42%	8	-86%	49,433	-16%
Netherlands	15,942	43%	4,511	4%	0	na	14,975	27%	7,074	5%	0	na	1,039	27%	85	-31%	43,625	25%
Malaysia	34,884	-13%	0	na	121	22%	3,016	8%	0	na	12	46%	191	0%	200	-12%	38,424	-11%
United Arab Emirates	24,492	26%	0	na	674	-7%	6,835	11%	0	na	407	-19%	829	-20%	696	27%	33,933	20%
Thailand	18,125	53%	1,378	55%	1,427	++	4,647	60%	679	65%	692	++	1,221	7%	209	++	28,379	57%
Denmark	8,446	-4%	8,263	39%	0	na	3,429	-8%	3,928	77%	0	na	660	8%	148	-71%	24,874	14%
Sweden	12,305	-5%	1,837	-23%	0	na	5,174	-7%	1,336	-1%	0	na	922	-15%	71	++	21,644	-7%
Taiwan	16,599	29%	0	na	371	38%	1,297	5%	0	-100%	139	35%	111	-20%	278	-8%	18,795	26%
Korea, R	14,141	16%	0	na	1,199	16%	2,194	-26%	0	na	65	41%	622	71%	112	26%	18,333	10%
Belgium	4,356	23%	3,902	51%	0	na	3,190	-15%	6,120	37%	0	na	328	-46%	185	-11%	18,081	19%
Finland	4,920	-19%	4,242	-2%	0	na	1,989	-34%	2,873	6%	0	na	286	-42%	493	++	14,802	-12%
Philippines	7,396	20%	0	na	0	na	2,089	8%	0	na	0	na	82	33%	101	-34%	9,667	17%
Rest of the world	61,748	1%	8,334	31%	1,650	0%	24,199	-2%	4,492	-22%	1,167	-3%	3,233	4%	2,067	-2%	106,889	1%
World	1,851,952	4%	321,929	4%	11,662	2%	384,453	1%	210,240	9%	5,280	-15%	53,371	10%	24,765	-16%	2,863,652	4%

Wine exports

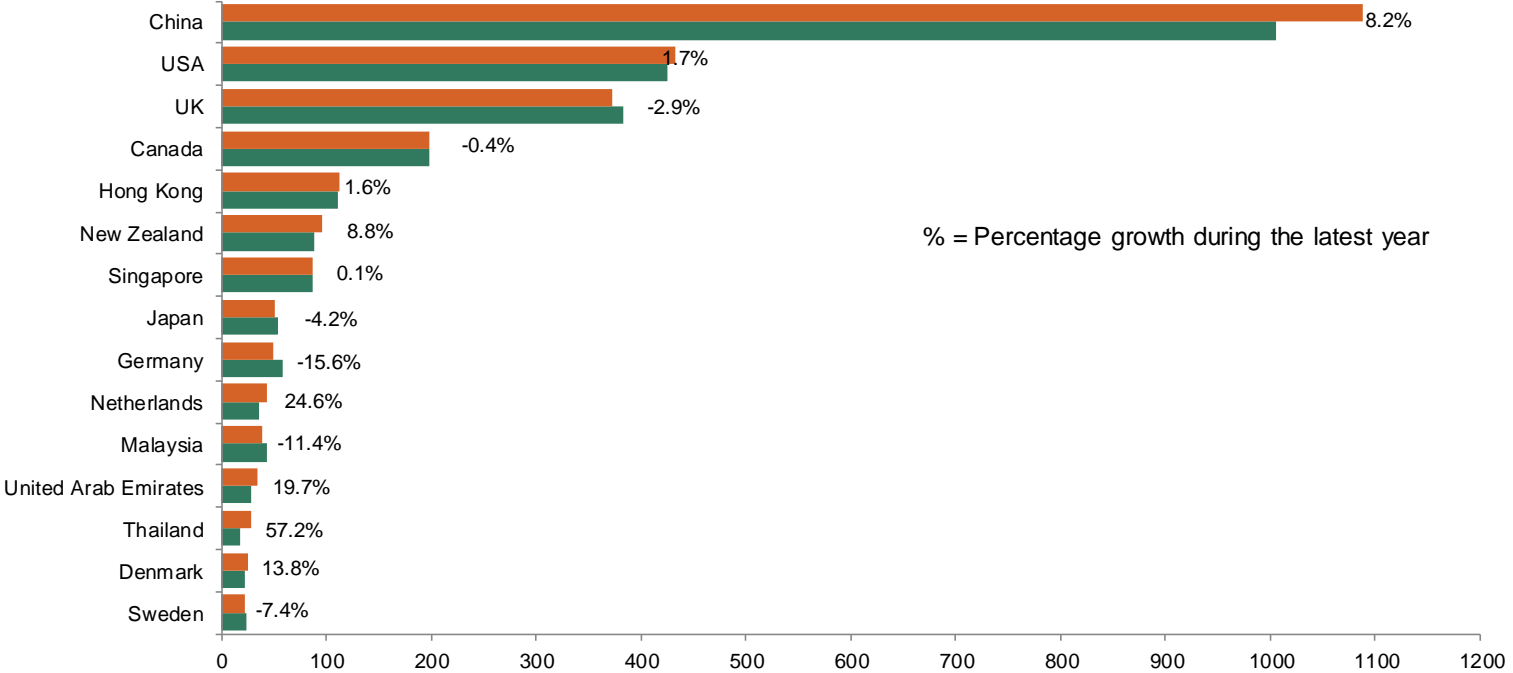
by country, container and colour

Volume for MAT June 2019

	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 June 2019 ('000 Litres)	Change %	MAT June 2019 ('000 Litres)	Change %	MAT June 2019 ('000 Litres)	Change %	MAT June 2019 ('000 Litres)	Change %	MAT June 2019 ('000 Litres)	Change %	MAT June 2019 ('000 Litres)	Change %	MAT June 2019 ('000 Litres)	Change %	MAT June 2019 ('000 Litres)	Change %	MAT June 2019 ('000 Litres)	Change %
United Kingdom	18,897	-25%	113,651	-3%	0	na	17,054	-20%	85,101	6%	0	na	1,291	57%	226	-18%	236,220	-4%
United States Of America	46,178	-10%	22,551	14%	0	-100%	37,484	6%	45,409	-9%	0	-100%	739	1%	144	-94%	152,505	-4%
China, Pr	110,416	-1%	28,312	-48%	255	-3%	3,747	-23%	1,656	-31%	19	-34%	1,083	-18%	681	-8%	146,169	-17%
Canada	16,707	-5%	14,253	-20%	112	-51%	9,257	-2%	24,393	11%	278	-28%	589	-14%	398	7%	65,986	-4%
Germany, Federal Republic	2,221	-49%	13,089	-25%	0	na	462	-74%	17,511	9%	0	na	15	++	0	-98%	33,298	-16%
New Zealand	10,277	5%	7,847	13%	397	28%	3,239	4%	9,005	-2%	211	-8%	1,031	-26%	950	++	32,956	5%
Netherlands	4,104	16%	3,339	-11%	0	na	4,132	10%	6,971	-9%	0	na	214	-13%	9	-82%	18,769	-1%
Japan	3,366	-12%	4,708	42%	1,405	0%	1,896	-9%	3,483	46%	595	1%	1,114	9%	852	-10%	17,419	12%
Denmark	1,276	-12%	6,153	18%	0	na	877	-2%	3,899	58%	0	na	144	11%	14	-89%	12,362	20%
Belgium	550	-2%	3,062	28%	0	na	549	-24%	6,428	24%	0	na	48	-64%	23	-38%	10,662	18%
Hong Kong	5,956	-3%	24	-1%	584	-9%	1,040	8%	0	na	119	15%	131	-11%	79	27%	7,931	-2%
Thailand	2,429	64%	1,030	48%	727	++	995	58%	696	71%	349	++	185	8%	44	99%	6,454	70%
Finland	697	-30%	2,482	-17%	0	na	402	-35%	2,694	-4%	0	na	32	-70%	104	69%	6,410	-15%
Singapore	4,588	1%	0	na	118	-47%	887	-3%	0	na	61	91%	687	12%	68	-5%	6,410	0%
Sweden	2,415	-6%	1,037	-30%	0	na	1,478	-2%	698	-4%	0	na	253	-6%	3	-12%	5,883	-10%
France	139	-3%	2,791	-6%	11	++	70	-10%	2,192	39%	8	++	1	++	0	-23%	5,213	10%
United Arab Emirates	1,990	5%	0	na	382	-13%	1,215	22%	0	na	268	-23%	112	-24%	183	14%	4,150	4%
Malaysia	2,417	-30%	0	na	64	7%	491	-7%	0	na	4	-24%	27	-4%	33	6%	3,035	-26%
Korea, R	1,904	18%	0	na	565	14%	351	-34%	0	na	22	51%	85	65%	15	-2%	2,942	8%
Ireland	1,100	-36%	207	++	0	na	1,164	-34%	156	++	0	na	21	-53%	3	15%	2,651	-26%
Rest of the world	12,046	6%	2,194	18%	835	1%	4,965	5%	1,850	-65%	569	-9%	591	23%	515	-7%	23,564	-8%
World	249,672	-6%	226,730	-12%	5,454	4%	91,755	-5%	212,143	2%	2,503	0%	8,390	-2%	4,345	-32%	800,992	-6%

Exports by top 15 destinations

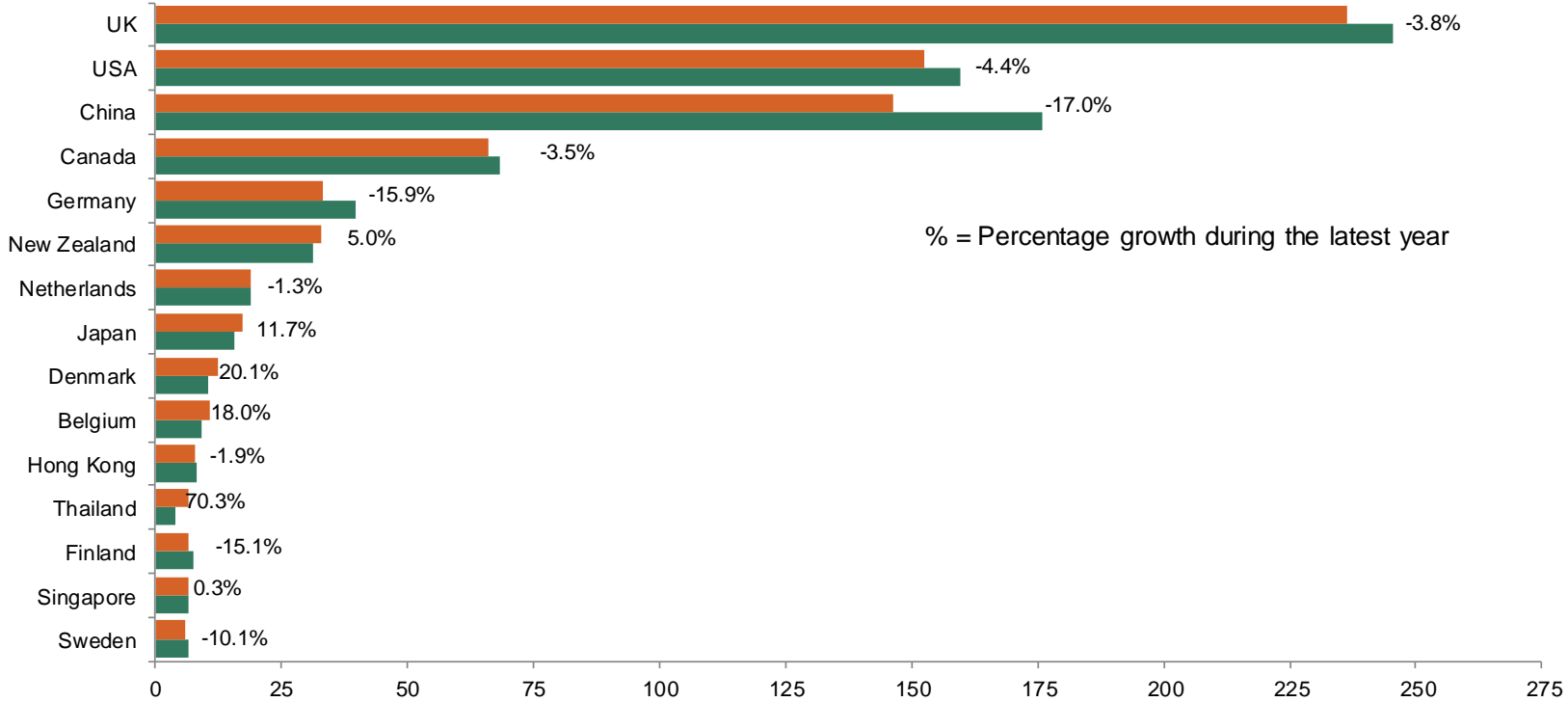
Value (million A\$) for MAT June 2019



	Sweden	Denmark	Thailand	United Arab Emirates	Malaysia	Netherlands	Germany	Japan	Singapore	New Zealand	Hong Kong	Canada	UK	USA	China
2019	21.6	24.9	28.4	33.9	38.4	43.6	49.4	51.0	87.2	96.3	112.0	198.0	372.7	432.0	1087.7
2018	23.4	21.9	18.0	28.4	43.4	35.0	58.6	53.3	87.1	88.5	110.2	198.7	383.8	424.6	1005.0

Exports by top 15 destinations

Volume (million litres) for MAT June 2019

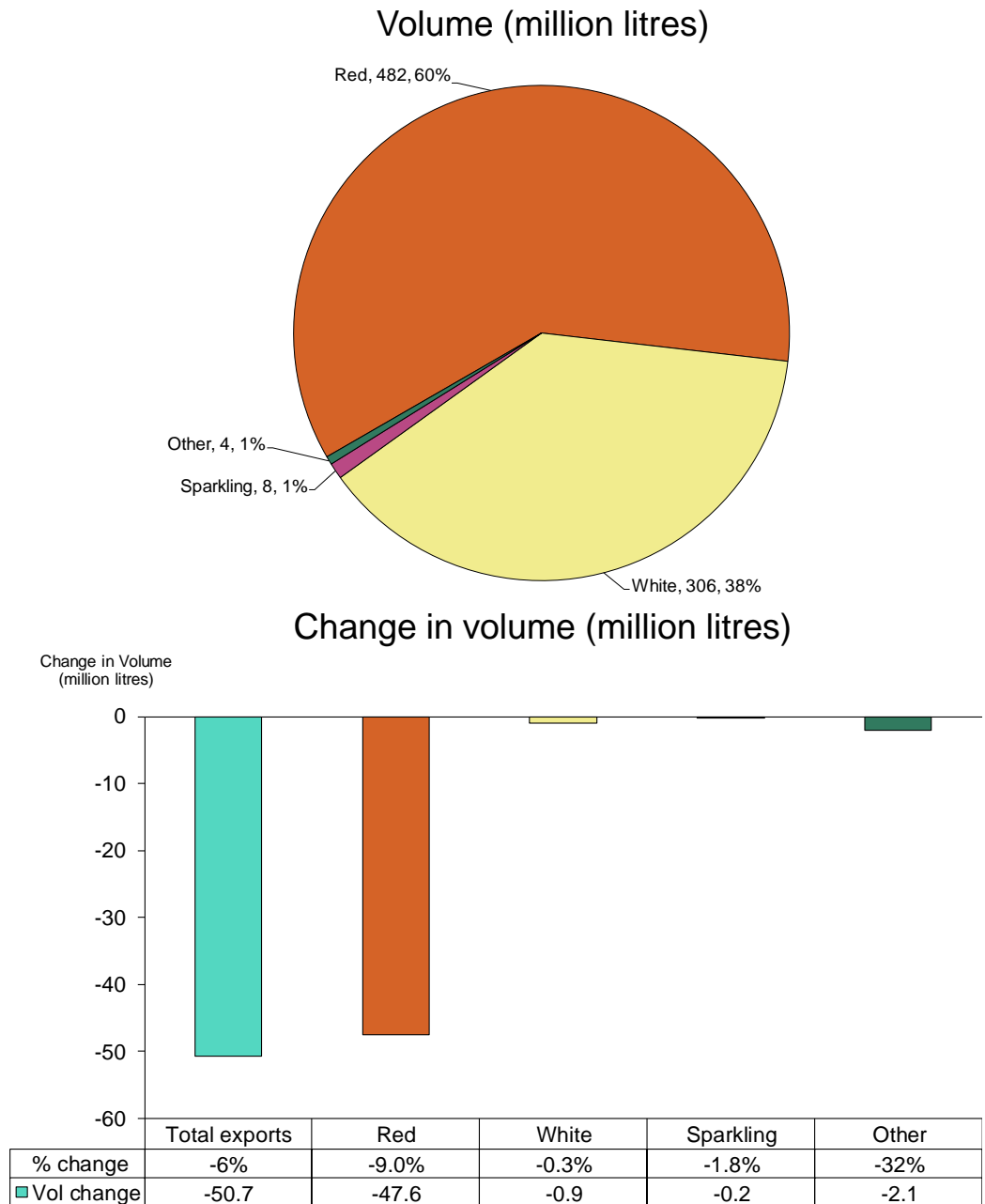


% = Percentage growth during the latest year

	Sweden	Singapore	Finland	Thailand	Hong Kong	Belgium	Denmark	Japan	Netherlands	New Zealand	Germany	Canada	China	USA	UK
2019	5.9	6.4	6.4	6.5	7.9	10.7	12.4	17.4	18.8	33.0	33.3	66.0	146.2	152.5	236.2
2018	6.5	6.4	7.6	3.8	8.1	9.0	10.3	15.6	19.0	31.4	39.6	68.4	176.0	159.6	245.6

Exports by colour/ wine style

MAT June 2019



Bottled wine exports report

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Bottled exports by price point and destination

Value ('000 A\$) for MAT June 2019

	\$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 June 2019 ('000 AUD)	Change %	MAT June 2019 ('000 AUD)	Change %	MAT June 2019 ('000 AUD)	Change %	MAT June 2019 ('000 AUD)	Change %	MAT June 2019 ('000 AUD)	Change %	MAT June 2019 ('000 AUD)	Change %	MAT June 2019 ('000 AUD)	Change %	MAT June 2019 ('000 AUD)	Change %
China	5,256	-48%	203,426	-9%	151,828	5%	54,951	-15%	187,376	45%	258,671	57%	156,953	-18%	1,018,462	10%
USA	9,063	-25%	259,272	0%	23,154	8%	19,259	42%	25,945	-7%	10,199	0%	4,707	20%	351,598	1%
UK	2,716	-82%	93,488	-16%	24,712	7%	14,330	27%	14,361	-12%	6,384	26%	2,202	-7%	158,192	-14%
Canada	303	-84%	42,002	-8%	68,387	3%	18,297	4%	21,854	9%	2,434	-15%	674	-24%	153,950	-1%
New Zealand	1,630	-38%	37,702	16%	18,108	0%	8,075	15%	5,691	-9%	1,429	3%	853	-43%	73,489	6%
Netherlands	1,830	-74%	19,786	54%	7,400	245%	1,531	167%	992	13%	316	7%	167	53%	32,021	34%
Hong Kong	53	46%	10,805	18%	8,317	-4%	3,649	-45%	20,332	5%	21,078	-15%	45,783	16%	110,016	2%
Japan	301	-70%	18,089	-4%	4,712	-20%	4,210	25%	5,728	9%	2,115	-22%	468	-90%	35,623	-14%
Singapore	262	-8%	7,274	15%	5,788	-5%	8,392	56%	14,132	-19%	24,892	1%	26,053	-1%	86,792	0%
Sweden	477	-63%	10,865	7%	2,363	-37%	2,836	11%	1,350	-4%	478	4%	103	11%	18,472	-6%
Thailand	336	9%	8,738	77%	2,780	17%	1,948	3%	2,422	54%	5,203	111%	2,775	13%	24,202	51%
United Arab Emirate	30	-5%	6,782	35%	4,789	-15%	2,453	1%	3,396	-15%	6,195	38%	9,063	70%	32,708	21%
Malaysia	96	-41%	4,487	-15%	3,055	-61%	1,818	-4%	4,536	22%	13,073	-8%	11,223	9%	38,288	-11%
Germany	2,629	-52%	2,732	-67%	2,467	0%	1,227	-35%	2,890	8%	772	-4%	552	31%	13,270	-40%
Korea, R	-	-100%	3,553	-6%	4,976	22%	1,802	14%	3,820	1%	1,818	-1%	1,093	85%	17,061	9%
Denmark	703	-45%	3,741	0%	2,021	-29%	1,779	-5%	2,685	12%	1,448	14%	306	-1%	12,683	-7%
Ireland	1,210	-45%	4,349	-38%	1,315	20%	320	-52%	1,149	212%	181	-28%	32	-38%	8,558	-27%
India	41	243%	6,819	23%	461	8%	40	-50%	242	-53%	94	-41%	78	-69%	7,774	11%
Philippines	47	-57%	6,374	21%	1,318	29%	334	18%	387	-48%	428	12%	779	55%	9,667	17%
Taiwan	35	162%	4,487	-3%	1,697	35%	653	-11%	2,387	21%	4,160	32%	4,866	79%	18,284	26%
Other	1,141	-51%	27,529	-15%	22,114	43%	9,659	-7%	18,352	5%	6,263	-9%	5,271	9%	90,328	1%
Total	28,157	-56%	782,299	-4%	361,762	5%	157,564	1%	340,026	20%	367,631	35%	274,001	-8%	2,311,440	3%

Bottled exports by price point and destination

Volume ('000 litres) for MAT June 2019

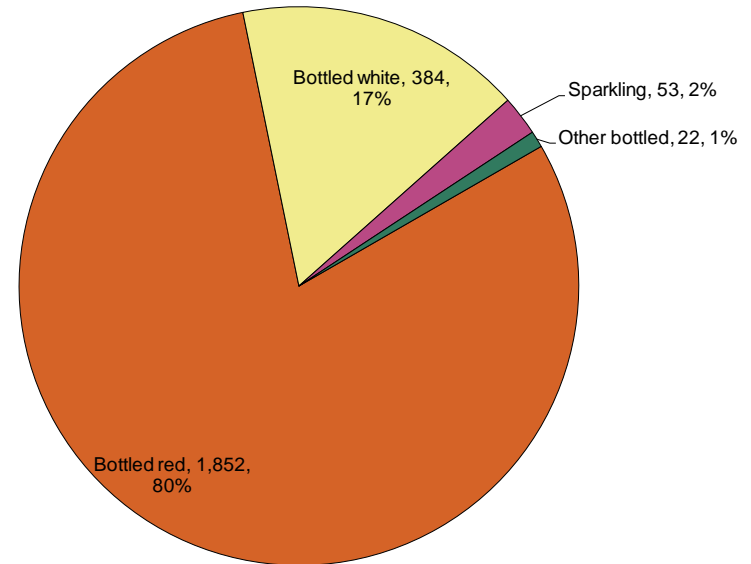
	\$2.49 and under		\$2.50 to \$4.99		\$5.00 to \$7.49		\$7.50 to \$9.99		\$10.00 to \$19.99		\$20.00 to \$49.99		\$50.00 and above		Total	
	MAT June 2019 ('000 Litres)	Change %	MAT June 2019 ('000 Litres)	Change %	MAT June 2019 ('000 Litres)	Change %	MAT June 2019 ('000 Litres)	Change %	MAT June 2019 ('000 Litres)	Change %	MAT June 2019 ('000 Litres)	Change %	MAT June 2019 ('000 Litres)	Change %	MAT June 2019 ('000 Litres)	Change %
China	2,400	-50%	55,229	-12%	25,845	4%	6,346	-15%	14,897	48%	9,470	52%	1,738	-28%	115,923	-2%
USA	3,783	-26%	72,103	-6%	3,956	6%	2,257	46%	2,020	-4%	366	-1%	62	30%	84,545	-6%
UK	1,190	-82%	28,822	-16%	4,198	8%	1,647	26%	1,152	-11%	221	24%	26	26%	37,255	-22%
Canada	133	-83%	11,397	-7%	11,293	1%	2,147	6%	1,870	10%	86	-14%	8	-24%	26,934	-4%
New Zealand	683	-40%	10,354	13%	2,981	1%	944	15%	471	-7%	53	6%	12	-44%	15,497	6%
Netherlands	749	-80%	6,173	87%	1,257	237%	185	174%	77	12%	12	11%	2	41%	8,455	11%
Hong Kong	40	85%	2,667	14%	1,346	-4%	423	-45%	1,578	2%	755	-14%	387	10%	7,196	-2%
Japan	129	-72%	4,980	-5%	800	-18%	481	23%	447	12%	77	-17%	5	-91%	6,919	-9%
Singapore	123	-11%	1,789	11%	976	0%	985	59%	1,093	-23%	946	-8%	313	-10%	6,225	1%
Sweden	208	-61%	3,119	12%	386	-35%	320	12%	98	-7%	16	5%	1	-2%	4,148	-4%
Thailand	136	-10%	2,401	85%	440	18%	227	0%	205	66%	212	108%	31	3%	3,652	59%
United Arab Emirates	13	-14%	1,693	26%	832	-10%	296	4%	287	-13%	227	33%	102	74%	3,451	10%
Malaysia	44	-39%	1,172	-16%	517	-61%	201	-8%	368	23%	528	-16%	137	20%	2,967	-27%
Germany	1,173	-58%	710	-71%	425	-3%	145	-34%	215	2%	25	-9%	4	51%	2,698	-56%
Korea, R	-	-100%	931	-4%	867	21%	210	14%	276	1%	59	-4%	11	104%	2,354	6%
Denmark	368	-44%	1,149	11%	332	-27%	206	-6%	203	11%	49	10%	3	3%	2,310	-11%
Ireland	511	-58%	1,397	-31%	233	30%	37	-51%	103	226%	7	-24%	0	-58%	2,288	-35%
India	19	248%	1,861	17%	83	15%	5	-47%	20	-54%	3	-42%	1	-74%	1,992	15%
Philippines	20	-61%	1,627	20%	231	29%	39	18%	30	-49%	15	5%	10	70%	1,972	16%
Taiwan	16	172%	1,097	-5%	288	32%	77	-12%	176	24%	149	25%	53	96%	1,855	6%
Other	511	-54%	7,609	-13%	3,822	48%	1,125	-6%	1,468	6%	227	-8%	62	10%	14,825	-3%
Total	12,247	-58%	218,277	-7%	61,107	4%	18,303	2%	27,056	21%	13,503	30%	2,970	-17%	353,463	-6%

Bottled exports by colour/wine style

Value

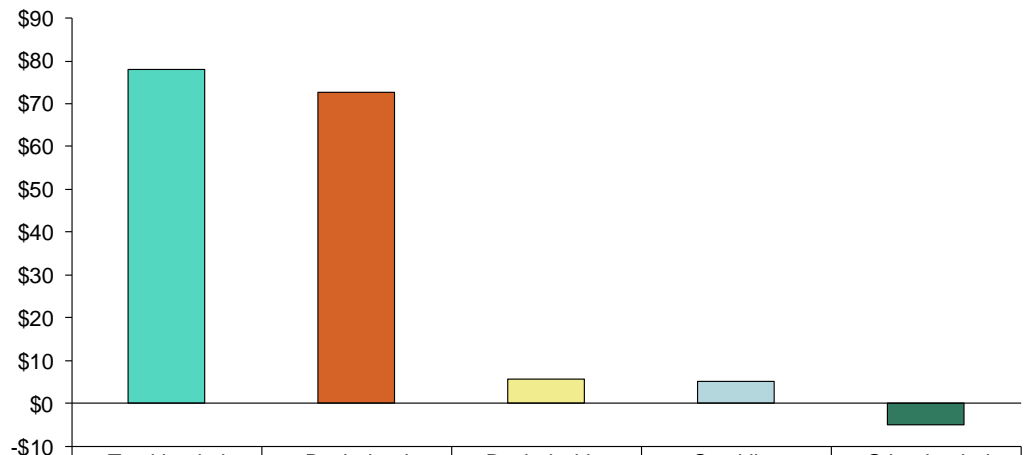
MAT June 2019

Value (A\$ million)



Change in value (A\$ million)

Change in Value (million AUD)



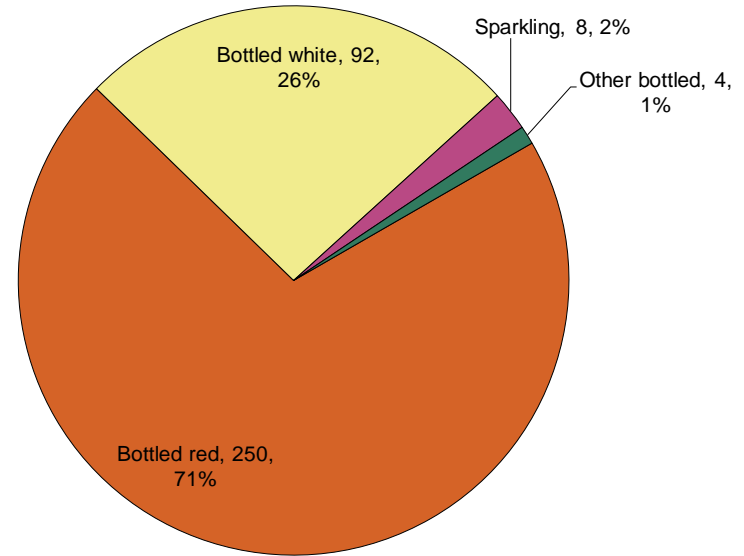
	Total bottled	Bottled red	Bottled white	Sparkling	Other bottled
% change	3.5%	4.1%	1.5%	10.5%	-18.7%
Vol change	78.2	72.6	5.5	5.1	-5.0

Bottled exports by colour/wine style

Volume

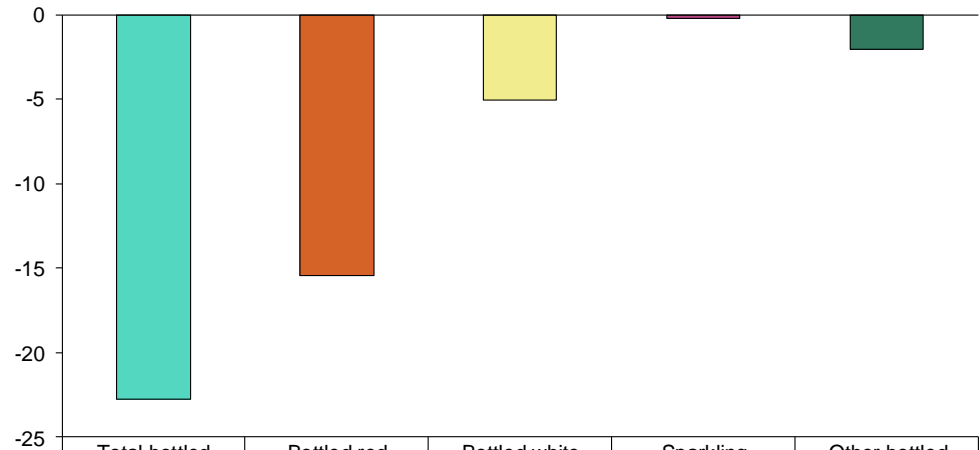
MAT June 2019

Volume (million litres)



Change in volume (million litres)

Change in Volume (million litres)



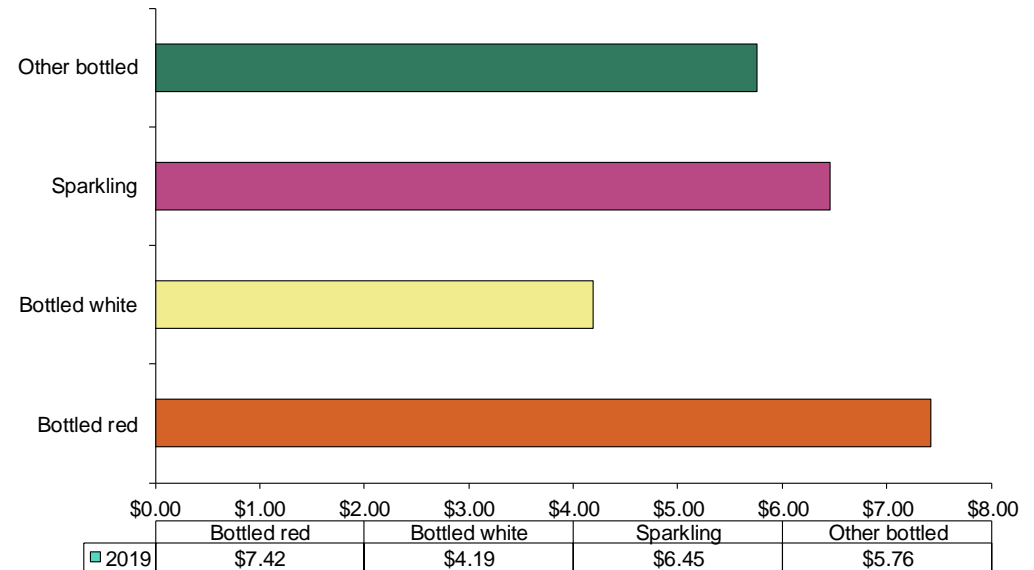
	Total bottled	Bottled red	Bottled white	Sparkling	Other bottled
% change	-6.1%	-5.8%	-5.2%	-2.9%	-35.1%
Vol change	-22.8	-15.4	-5.1	-0.2	-2.1

Bottled exports by colour/wine style

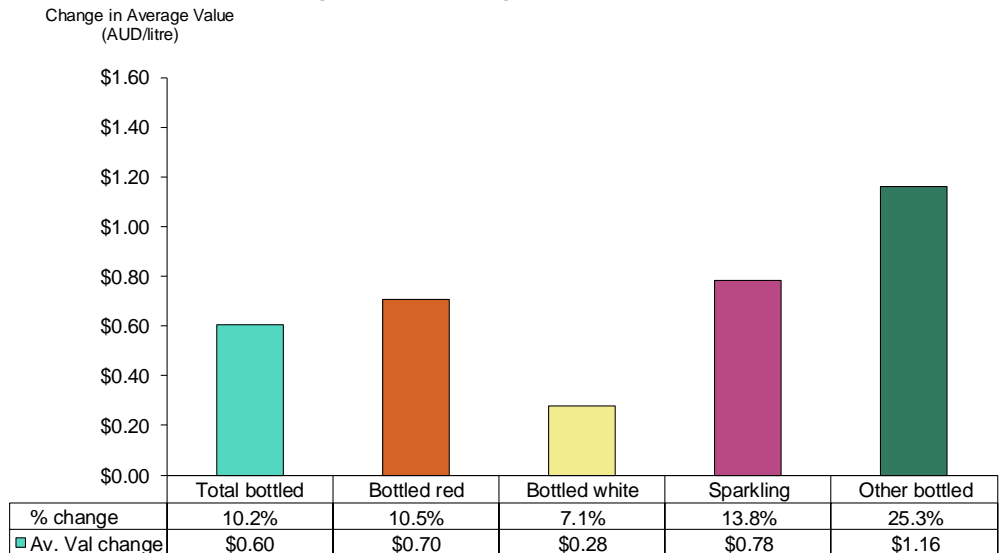
Average value

MAT June 2019

Average value (A\$ per litre)

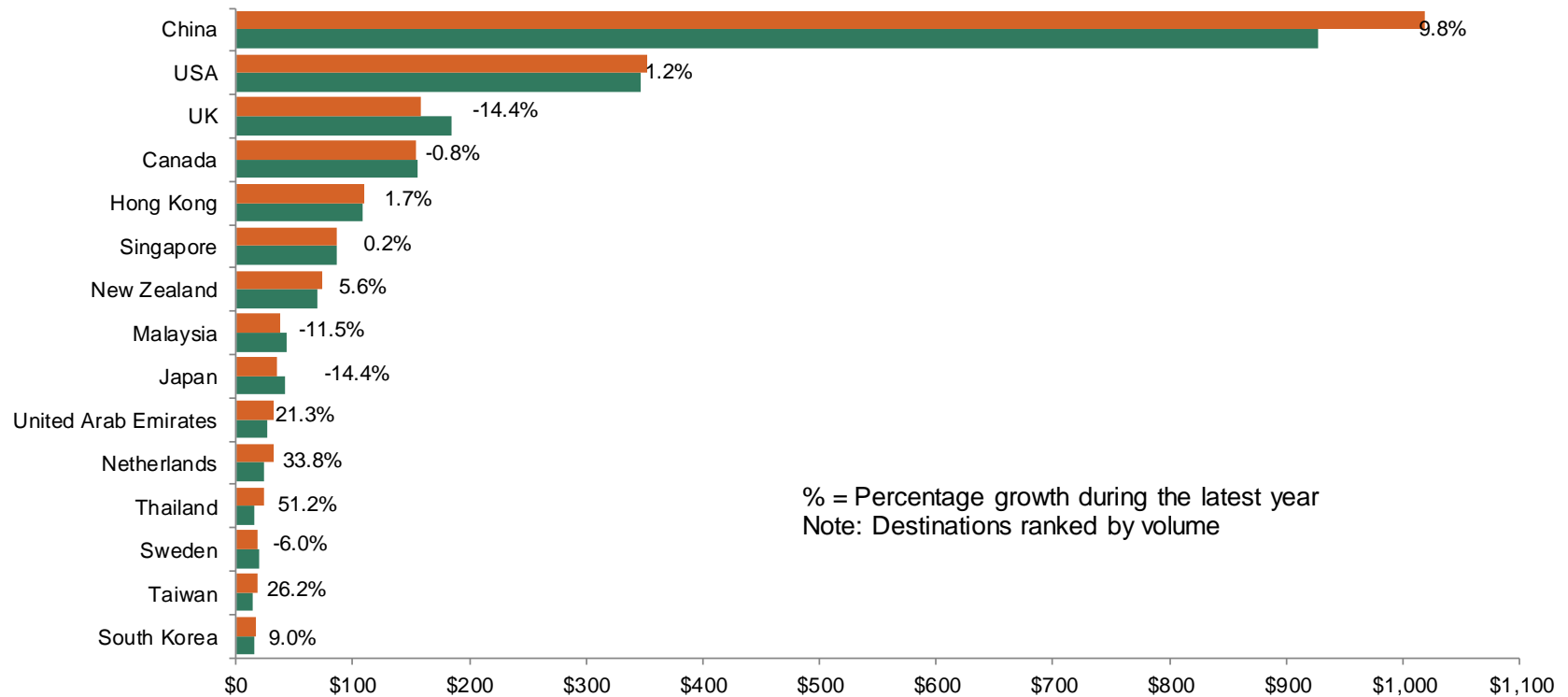


Change in average value (A\$ per litre)



Bottled exports by top 15 destinations

Value (million A\$) for MAT June 2019

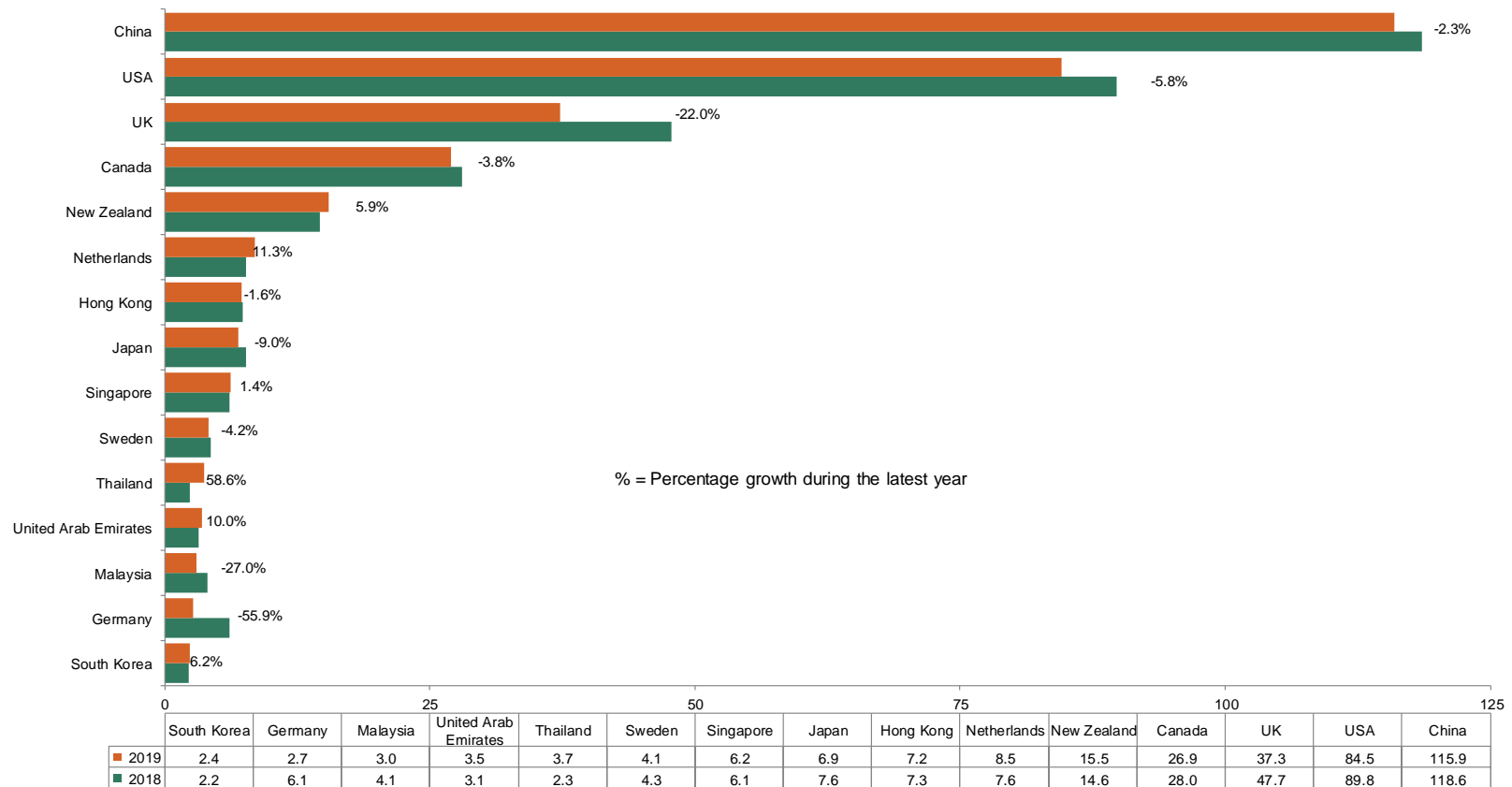


% = Percentage growth during the latest year
Note: Destinations ranked by volume

	South Korea	Taiwan	Sweden	Thailand	Netherlands	United Arab Emirates	Japan	Malaysia	New Zealand	Singapore	Hong Kong	Canada	UK	USA	China
2019	17.1	18.3	18.5	24.2	32.0	32.7	35.6	38.3	73.5	86.8	110.0	153.9	158.2	351.6	1018.5
2018	15.7	14.5	19.7	16.0	23.9	27.0	41.6	43.3	69.6	86.6	108.2	155.2	184.9	347.3	927.4

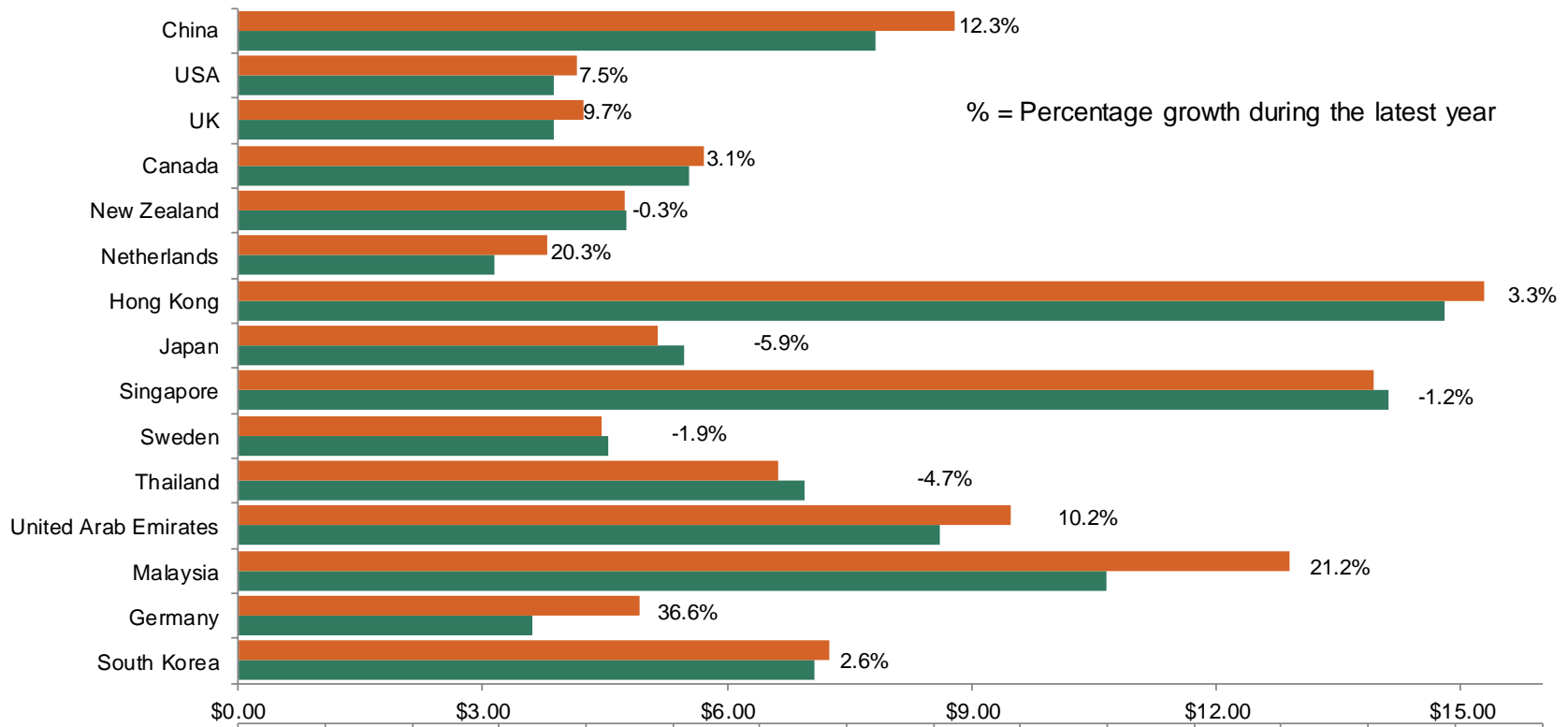
Bottled exports by top 15 destinations

Volume (million litres) for MAT June 2019



Bottled exports by top 15 destinations

Average value (A\$ per litre) for MAT June 2019



	South Korea	Germany	Malaysia	United Arab Emirates	Thailand	Sweden	Singapore	Japan	Hong Kong	Netherlands	New Zealand	Canada	UK	USA	China
2019	\$7.25	\$4.92	\$12.90	\$9.48	\$6.63	\$4.45	\$13.94	\$5.15	\$15.29	\$3.79	\$4.74	\$5.72	\$4.25	\$4.16	\$8.79
2018	\$7.06	\$3.60	\$10.65	\$8.60	\$6.95	\$4.54	\$14.11	\$5.47	\$14.80	\$3.15	\$4.75	\$5.54	\$3.87	\$3.87	\$7.82

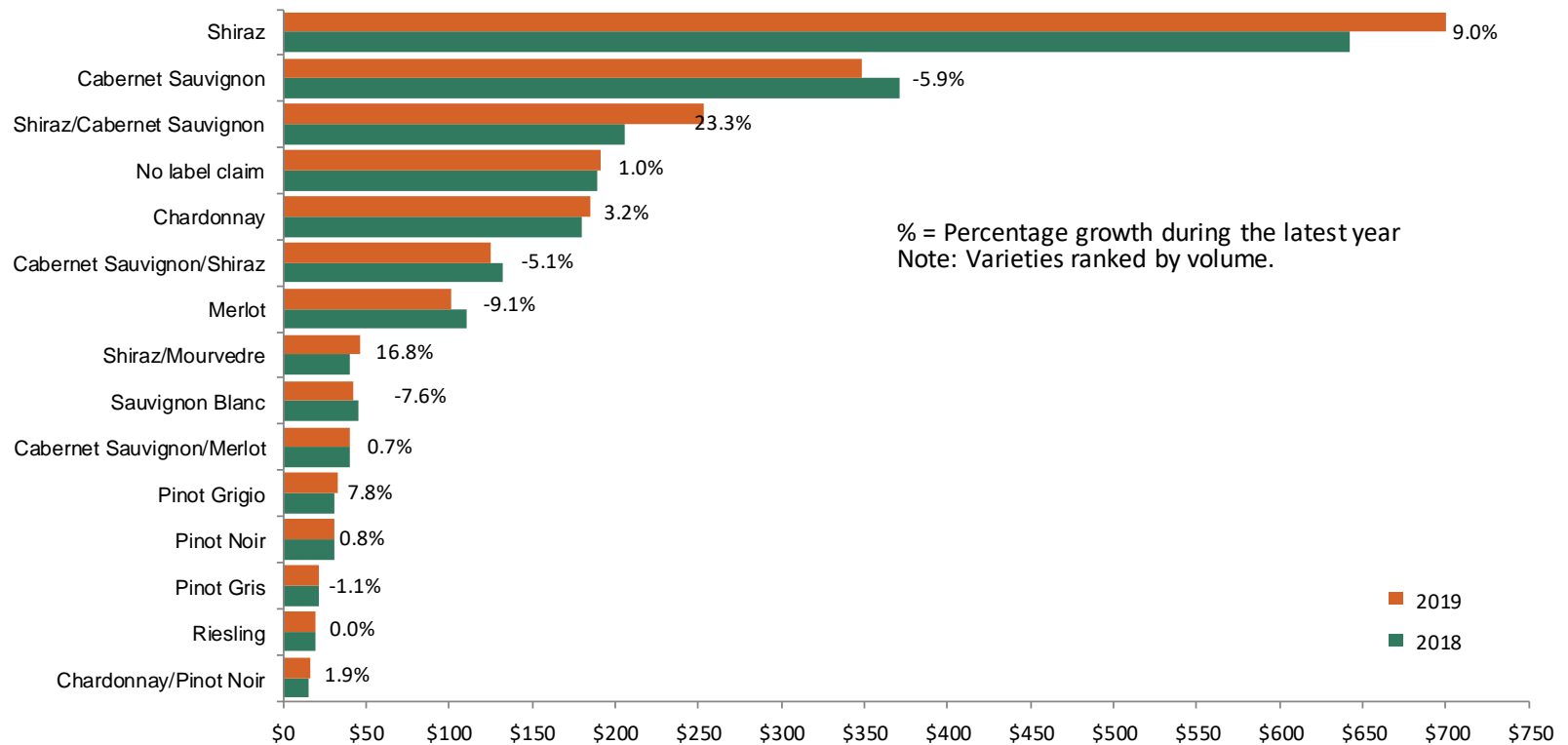
Bottled exports by top 15 variety label claims

MAT June 2019

Top 15 variety label claims	Volume (million litres)		Value (A\$ million FOB)		Average value (\$A per litre FOB)	
	2019	Change	2019	Change	2019	Change
Shiraz	86.98	-5%	700.76	9%	8.06	14%
Cabernet Sauvignon	50.44	-5%	348.99	-6%	6.92	-1%
Chardonnay	45.45	-4%	185.53	3%	4.08	27%
No label claim	38.55	-5%	191.46	1%	4.97	7%
Shiraz/Cabernet Sauvignon	33.30	-3%	253.60	23%	7.62	8%
Merlot	24.15	-17%	100.99	-9%	4.18	-1%
Sauvignon Blanc	11.79	-10%	42.07	-8%	3.57	9%
Cabernet Sauvignon/Merlot	8.53	-4%	40.50	1%	4.75	14%
Pinot Grigio	7.90	-9%	33.14	8%	4.19	2%
Pinot Gris	6.12	-7%	21.31	-1%	3.48	5%
Cabernet Sauvignon/Shiraz	5.41	-4%	125.41	-5%	23.18	18%
Pinot Noir	4.87	-11%	30.87	1%	6.34	13%
Riesling	3.42	-1%	20.16	0%	5.90	6%
Chardonnay/Pinot Noir	3.00	-1%	16.30	2%	5.43	1%
Shiraz/Mourvedre	2.06	2%	46.54	17%	22.60	3%

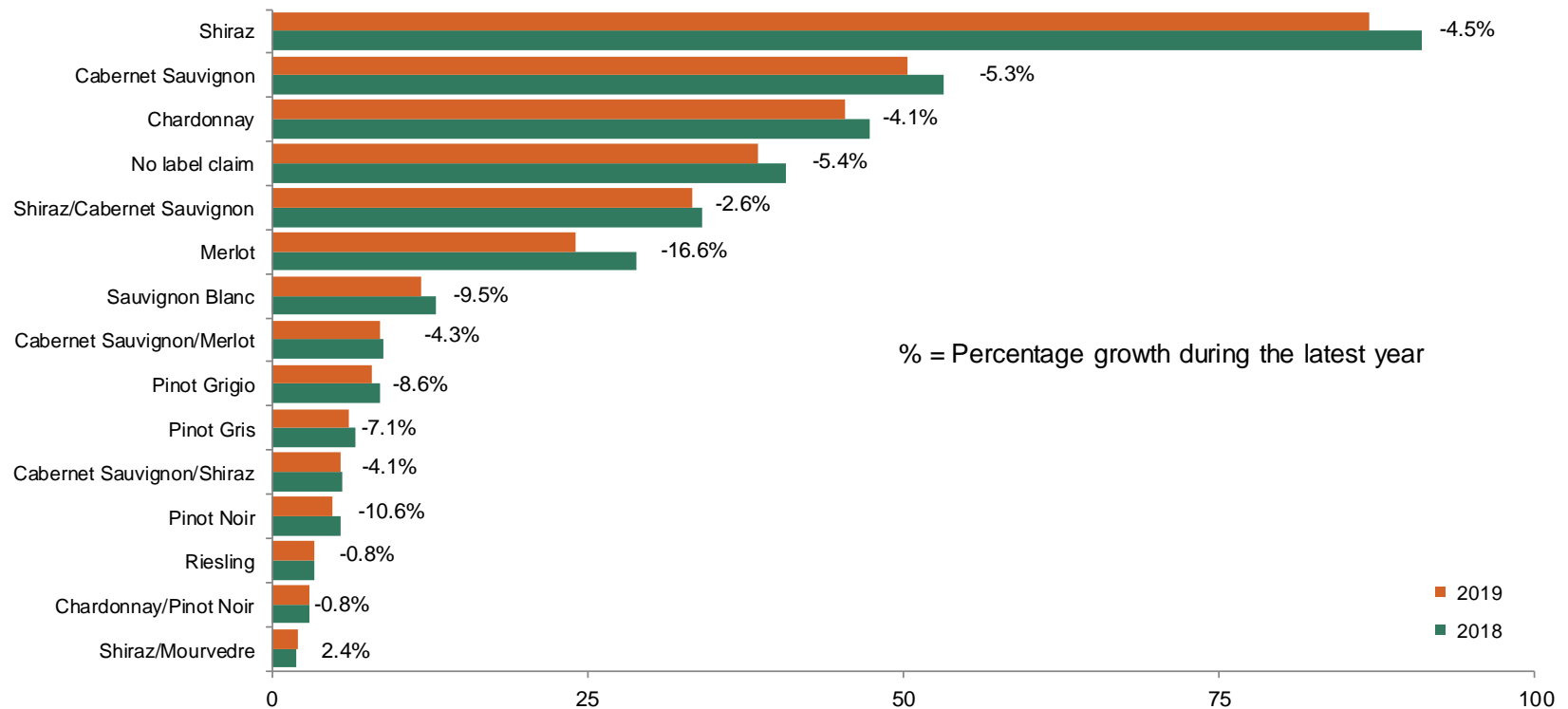
Bottled exports by top 15 variety label claims

Value (million A\$) for MAT June 2019



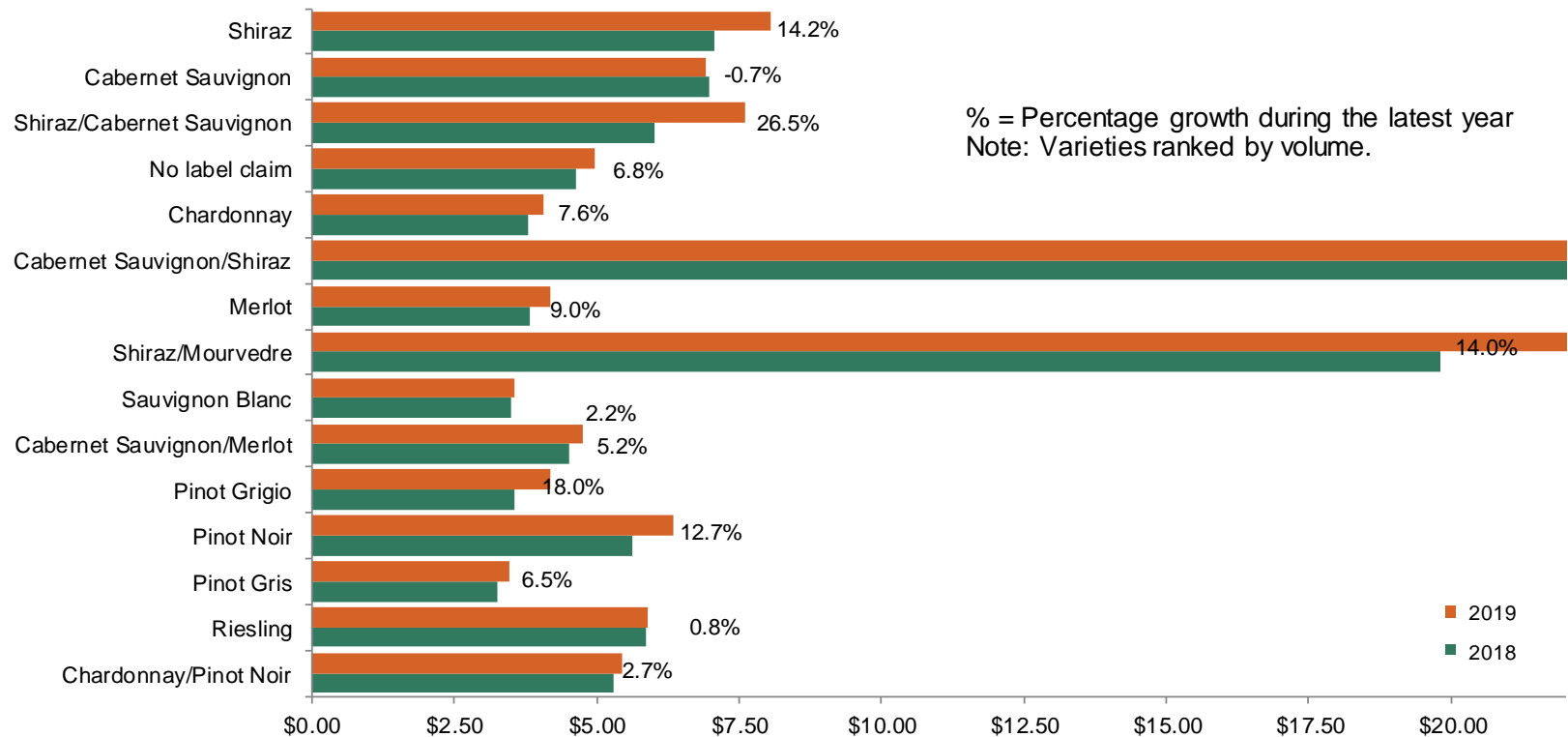
Bottled exports by top 15 variety label claims

Volume (million litres) for MAT June 2019



Bottled exports by top 15 variety label claims

Average Value (A\$ per litre) for MAT June 2019



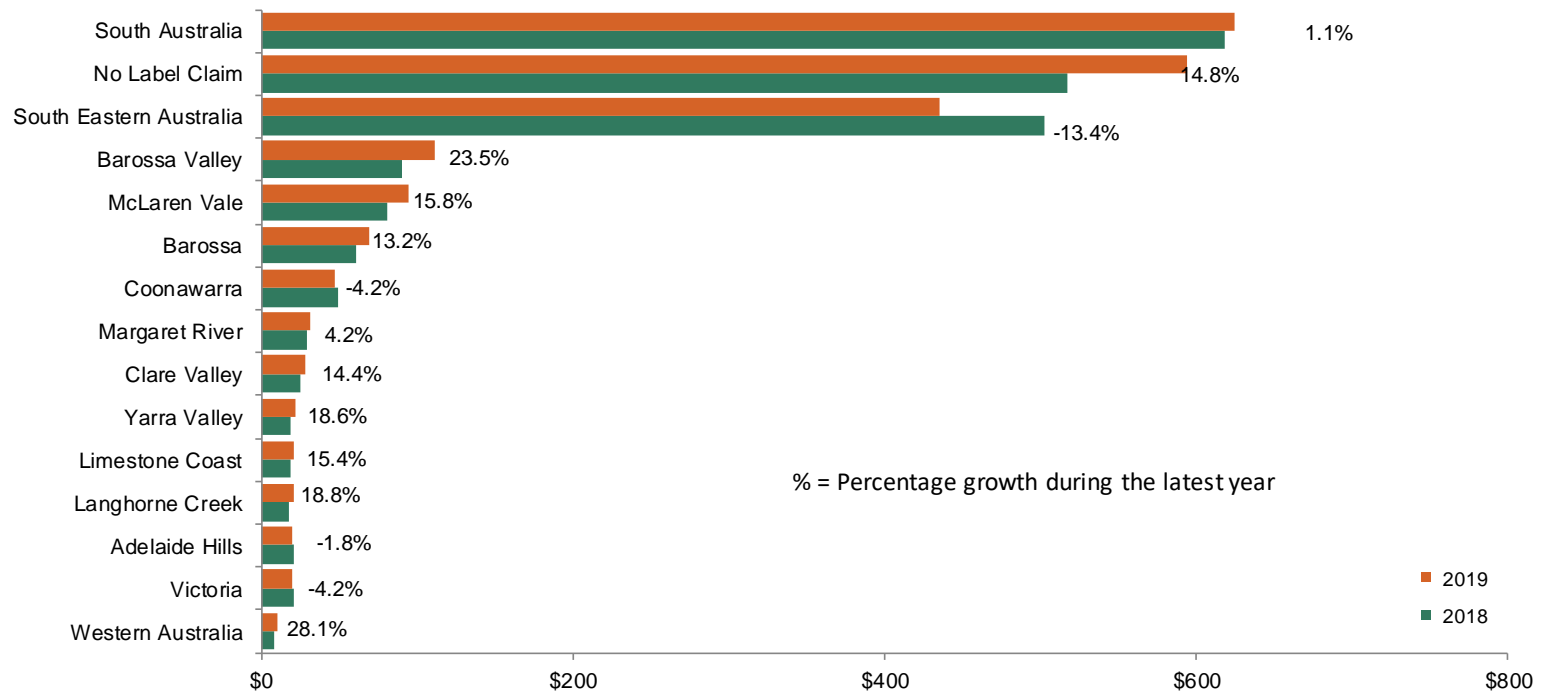
Bottled exports by top 15 GI region label claims

MAT June 2019

Top 15 GI label claims	Volume (million litres)		Value (A\$ million FOB)		Average value (\$A per litre FOB)	
	2019	Change	2019	Change	2019	Change
South Australia	63.68	1%	625.69	1%	9.83	1%
No Label Claim	111.74	5%	594.43	15%	5.32	9%
South Eastern Australia	119.18	-18%	435.42	-13%	3.65	6%
Barossa Valley	5.50	11%	111.29	24%	20.24	11%
McLaren Vale	7.87	11%	94.06	16%	11.95	4%
Barossa	5.50	2%	68.66	13%	12.49	12%
Coonawarra	3.15	-15%	46.84	-4%	14.88	13%
Margaret River	2.48	-1%	30.82	4%	12.45	5%
Clare Valley	3.28	7%	28.50	14%	8.68	7%
Yarra Valley	1.33	2%	21.50	19%	16.20	16%
Limestone Coast	3.29	6%	21.22	15%	6.46	9%
Langhorne Creek	2.46	24%	21.13	19%	8.58	-4%
Adelaide Hills	1.89	-8%	19.97	-2%	10.54	7%
Victoria	2.94	-10%	19.66	-4%	6.68	6%
Western Australia	1.56	29%	10.37	28%	6.65	-1%

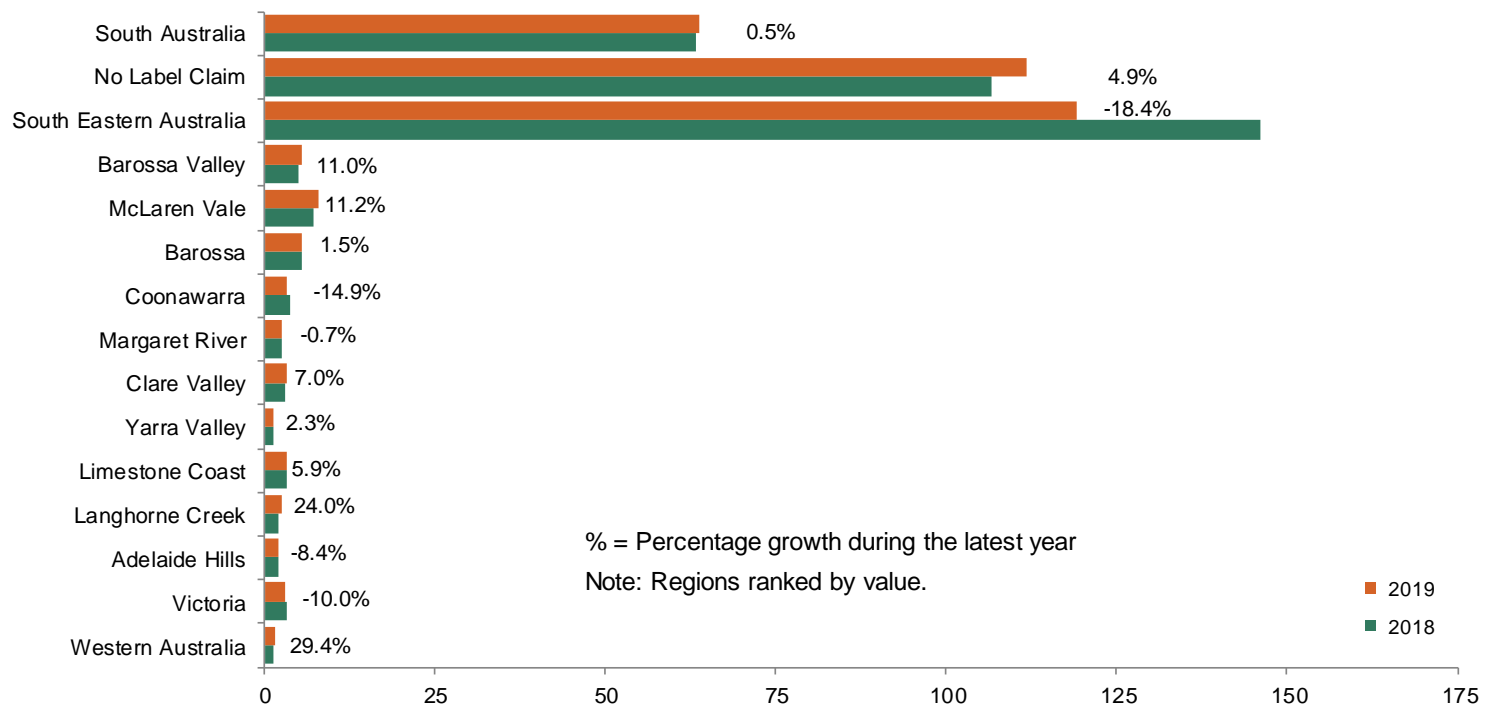
Bottled exports by top 15 GI region label claims

Value (million A\$) for MAT June 2019



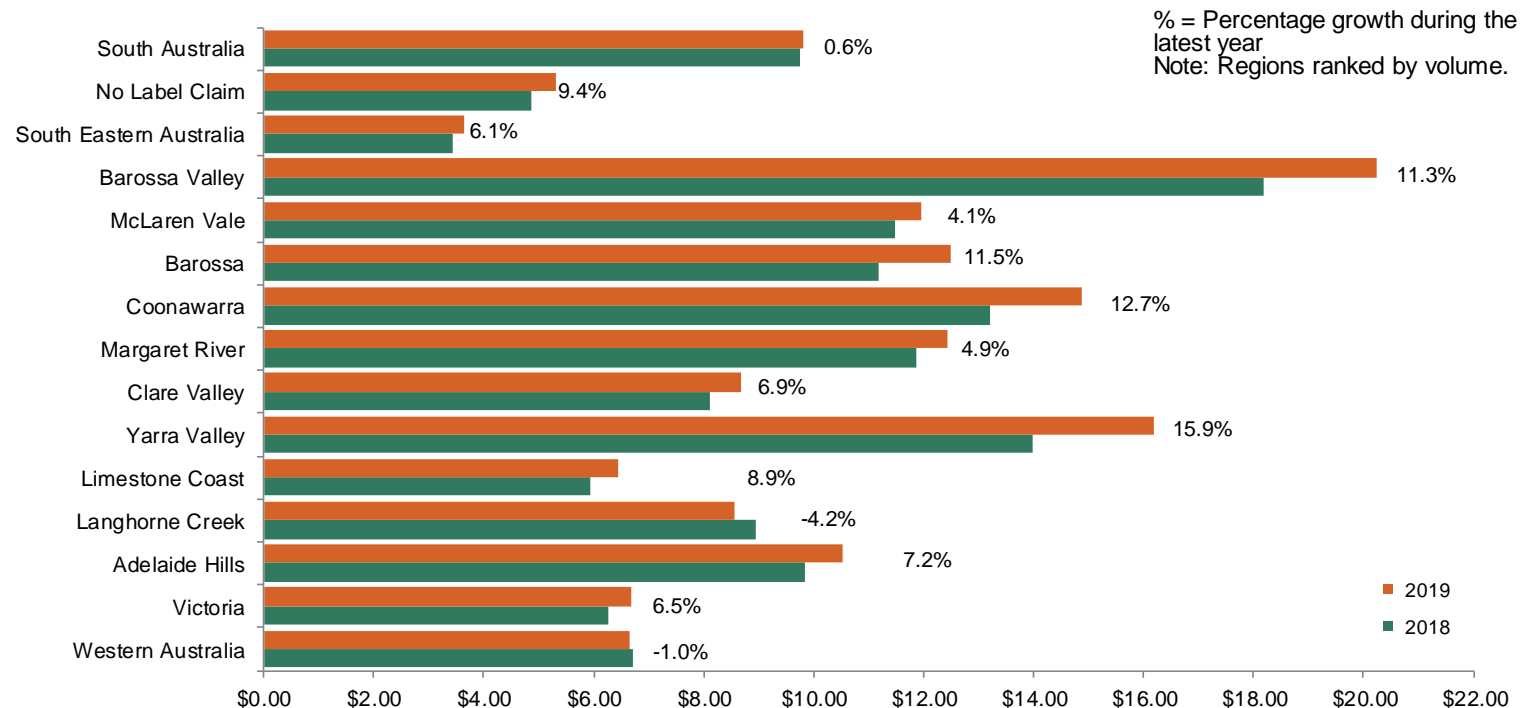
Bottled exports by top 15 GI region label claims

Volume (million litres) for MAT June 2019



Bottled exports by top 15 GI region label claims

Average Value (A\$ per litre) for MAT June 2019

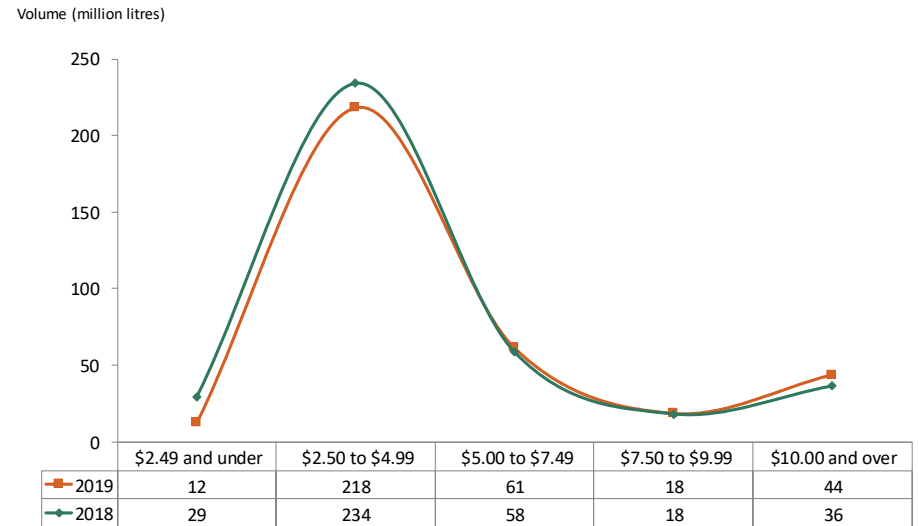


Bottled exports by price point

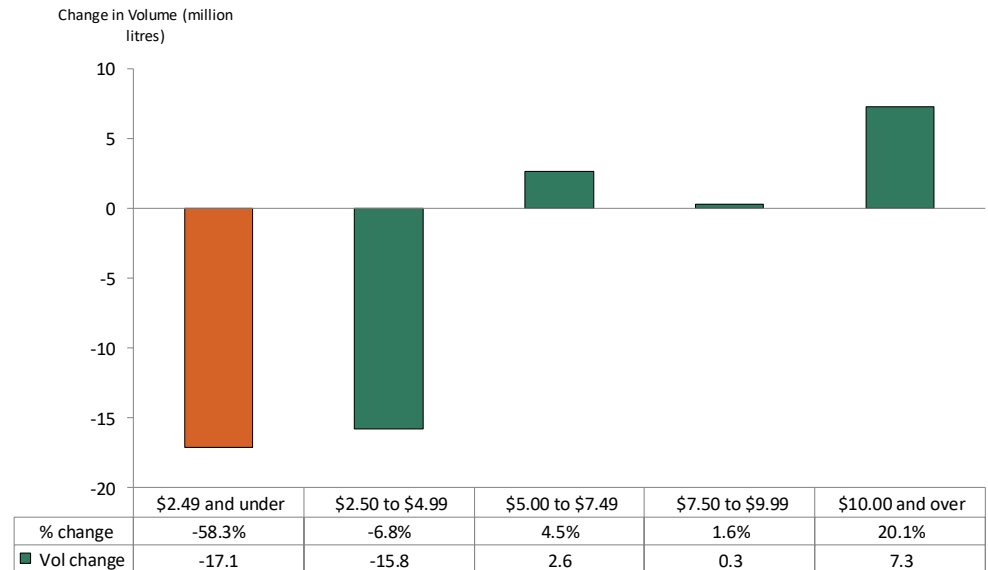
Volume

MAT June 2019

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 June 2019

	\$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 June 2019 ('000 AUD)	Change %	MAT June 2019 ('000 AUD)	Change %	MAT June 2019 ('000 AUD)	Change %	MAT June 2019 ('000 AUD)	Change %	MAT June 2019 ('000 AUD)	Change %	MAT June 2019 ('000 AUD)	Change %	MAT June 2019 ('000 AUD)	Change %
UK	18	-67%	70,514	-29%	120,153	49%	11,853	39%	2,279	-21%	9,666	25%	214,483	8%
USA	154	na	30,745	-12%	30,677	26%	15,693	32%	1,408	-19%	1,728	-57%	80,405	5%
China	-	na	112	-97%	19,911	-61%	6,395	-16%	6,008	-23%	36,099	540%	68,524	-11%
Canada	-	na	8,887	-34%	31,781	20%	1,494	195%	466	108%	-	na	42,627	5%
Germany	-	na	11,423	-32%	20,200	43%	1,955	893%	828	-25%	1,757	-59%	36,162	-1%
New Zealand	100	41%	6,686	4%	7,328	19%	706	25%	115	-32%	6,479	56%	21,414	22%
Denmark	-	-100%	2,479	6%	8,516	105%	929	-13%	169	-44%	97	-67%	12,191	49%
Netherlands	-	na	3,029	-49%	7,099	42%	1,351	749%	106	na	-	na	11,585	4%
Belgium	-	na	3,396	-23%	5,549	140%	841	161%	236	na	1	na	10,023	42%
Japan	-	na	1,943	-7%	5,648	67%	1,650	162%	98	na	495	102%	9,834	55%
Finland	-	na	546	-79%	4,105	52%	959	-20%	688	1246%	817	54%	7,114	1%
France	-	na	975	-8%	2,578	-24%	2,548	362%	50	0%	361	45%	6,512	23%
Sweden	-	na	-	-100%	488	-50%	1,272	48%	437	-65%	975	94%	3,172	-15%
Thailand	-	na	420	94%	1,373	40%	266	146%	-	na	-	na	2,058	58%
Switzerland	-	na	252	-71%	623	13%	221	na	110	10%	340	na	1,547	2%
Norway	-	na	-	na	976	13%	-	na	-	na	288	na	1,264	47%
Spain	-	na	41	-95%	357	-3%	383	na	109	na	247	na	1,138	-11%
Poland	-	na	-	-100%	122	-55%	572	190%	-	na	131	1%	825	33%
Other	-	na	430	-78%	467	216%	412	74%	172	7740%	341	6%	1,823	-32%
Total	272	86%	141,878	-28%	267,951	17%	49,498	43%	13,280	-15%	59,823	114%	532,701	6%

Unpackaged wine exports by price point and destination

Volume ('000 litres) for MAT June 2019

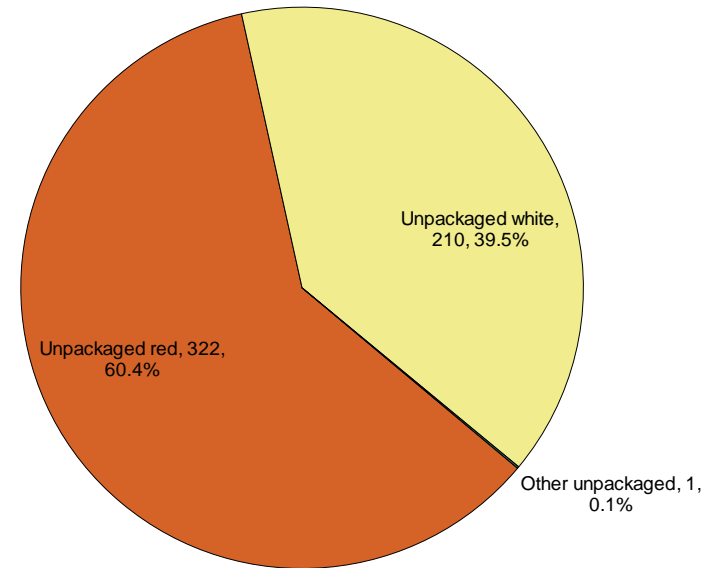
	\$0.50 and under		\$0.50 to \$1.00		\$1.00 to \$1.50		\$1.50 to \$2.00		\$2.00 to \$2.50		\$2.50 and above		Total	
	MAT June 2019 ('000 Litres)	Change %	MAT June 2019 ('000 Litres)	Change %	MAT June 2019 ('000 Litres)	Change %	MAT June 2019 ('000 Litres)	Change %	MAT June 2019 ('000 Litres)	Change %	MAT June 2019 ('000 Litres)	Change %	MAT June 2019 ('000 Litres)	Change %
UK	72	-51%	84,963	-29%	102,966	48%	7,213	45%	1,059	-19%	2,692	20%	198,966	1%
USA	340	na	33,266	-18%	23,676	20%	9,566	27%	647	-23%	465	-51%	67,959	-3%
Canada	-	na	10,551	-33%	27,010	14%	860	178%	226	106%	-	na	38,646	-3%
Germany	-	na	12,449	-36%	15,943	33%	1,224	921%	408	-26%	576	-58%	30,600	-9%
China	-	na	120	-97%	15,765	-63%	3,931	-14%	2,688	-23%	7,464	414%	29,968	-48%
New Zealand	256	2%	8,879	-6%	6,031	14%	433	24%	48	-34%	1,205	56%	16,852	4%
Netherlands	-	na	3,419	-52%	5,955	43%	888	789%	48	na	-	na	10,310	-10%
Denmark	-	-100%	2,755	-2%	6,639	67%	549	-11%	72	-45%	37	-49%	10,052	31%
Belgium	-	na	4,103	-23%	4,781	136%	509	163%	96	na	0	na	9,490	25%
Japan	-	na	2,060	-13%	4,965	71%	974	167%	48	na	144	100%	8,191	43%
Finland	-	na	582	-78%	3,480	56%	603	-10%	299	1102%	212	43%	5,176	-10%
France	-	na	1,033	-14%	2,202	-25%	1,616	411%	24	0%	109	89%	4,984	10%
Sweden	-	na	-	-100%	415	-46%	714	42%	216	-65%	390	117%	1,735	-22%
Thailand	-	na	480	100%	1,079	36%	168	133%	-	na	-	na	1,726	56%
Switzerland	-	na	336	-70%	504	24%	144	na	48	0%	72	na	1,103	-30%
Norway	-	na	-	na	696	-6%	-	na	-	na	96	na	792	7%
Spain	-	na	48	-96%	290	-7%	220	na	52	na	98	na	708	-54%
Italy	-	na	528	-55%	-	na	96	-33%	-	-100%	-	-100%	624	-54%
Other	-	na	48	-97%	493	56%	510	325%	76	na	148	42%	1,275	-35%
Total	668	35%	165,620	-30%	222,892	14%	30,217	44%	6,054	-16%	13,707	84%	439,158	-6%

Unpackaged exports by colour/wine style

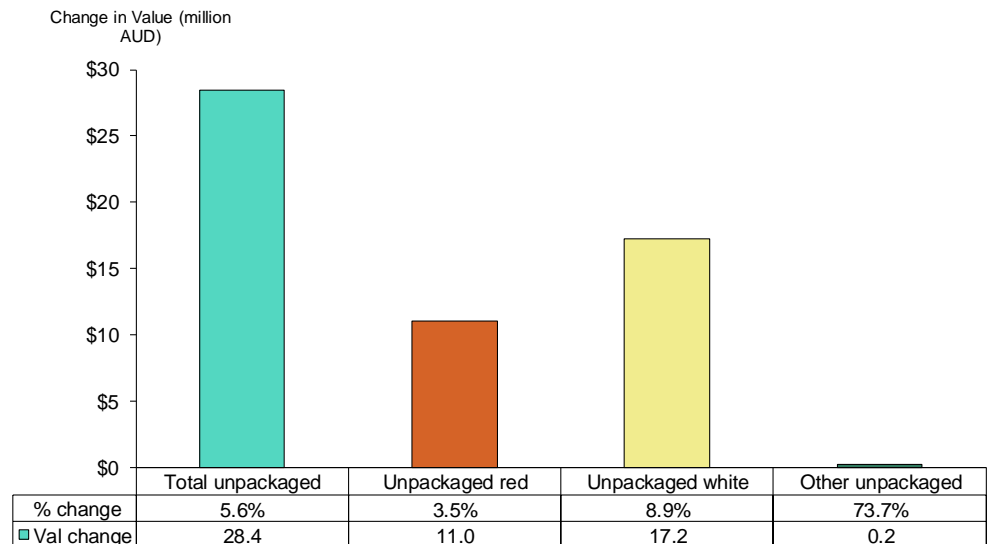
Value

MAT June 2019

Value (A\$ million)



Change in Value (A\$ million)

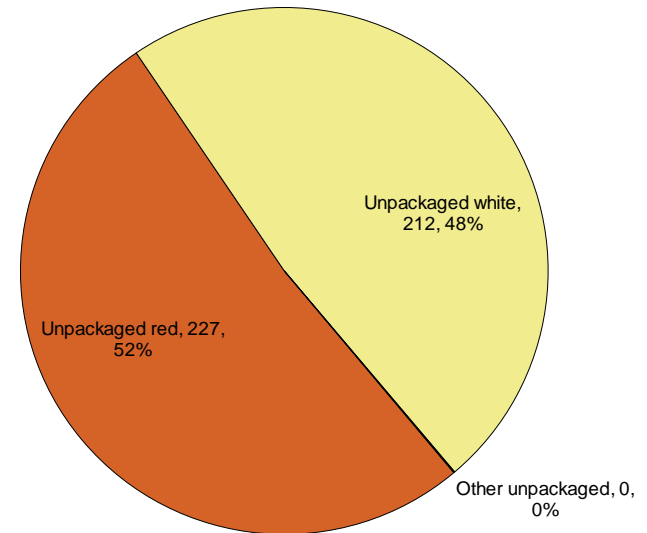


Unpackaged exports by colour/wine style

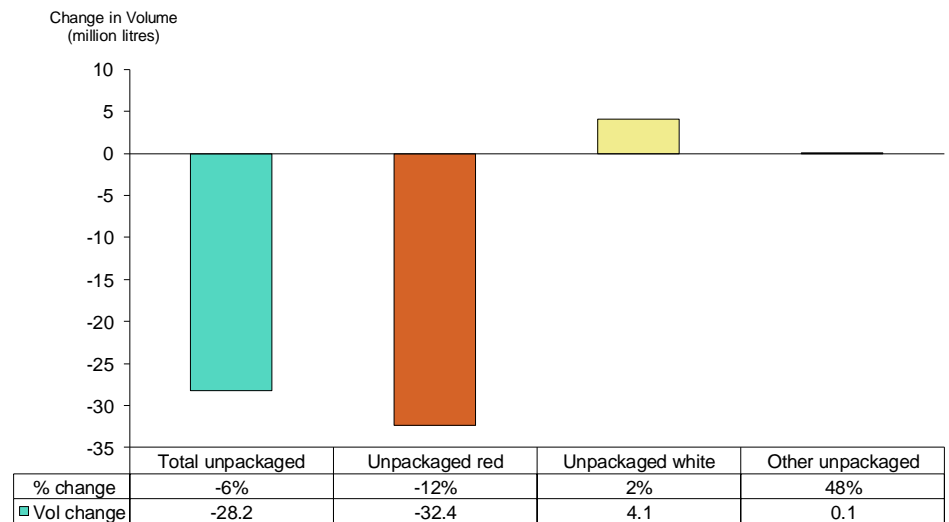
Volume

MAT June 2019

Volume (million litres)



Change in Volume (million litres)



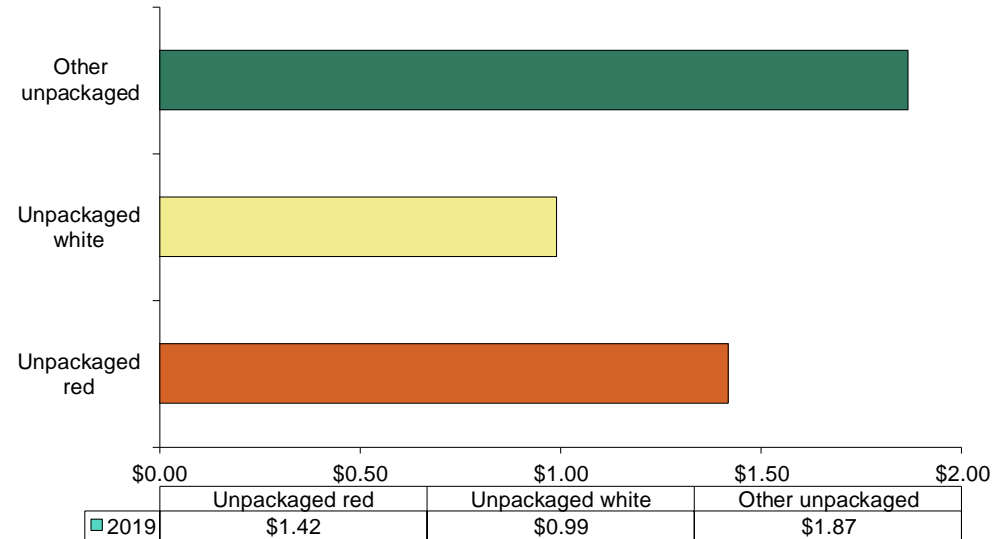
	Total unpackaged	Unpackaged red	Unpackaged white	Other unpackaged
% change	-6%	-12%	2%	48%
Vol change	-28.2	-32.4	4.1	0.1

Unpackaged exports by colour/wine style

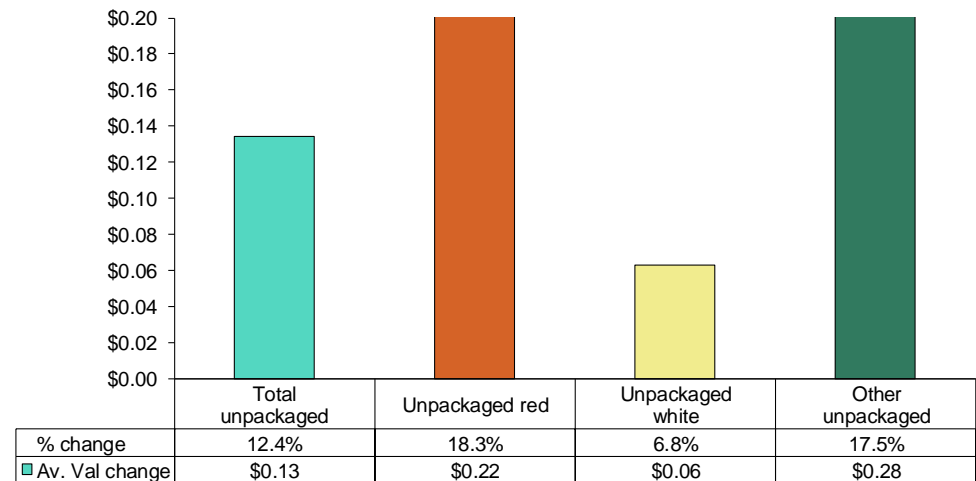
Average value

MAT June 2019

Average value (A\$ per litre)

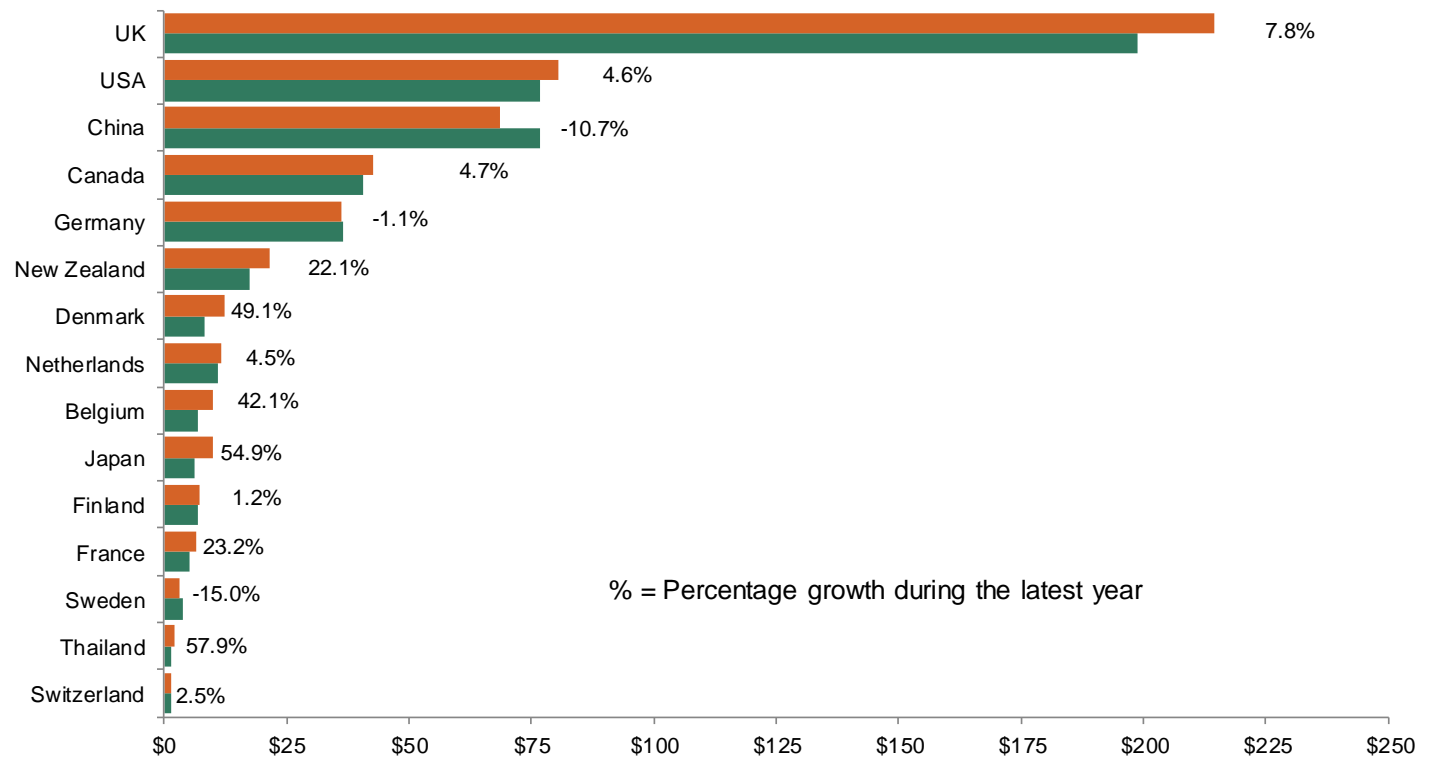


Change in average value (A\$ per litre)



Unpackaged exports by top 15 destinations

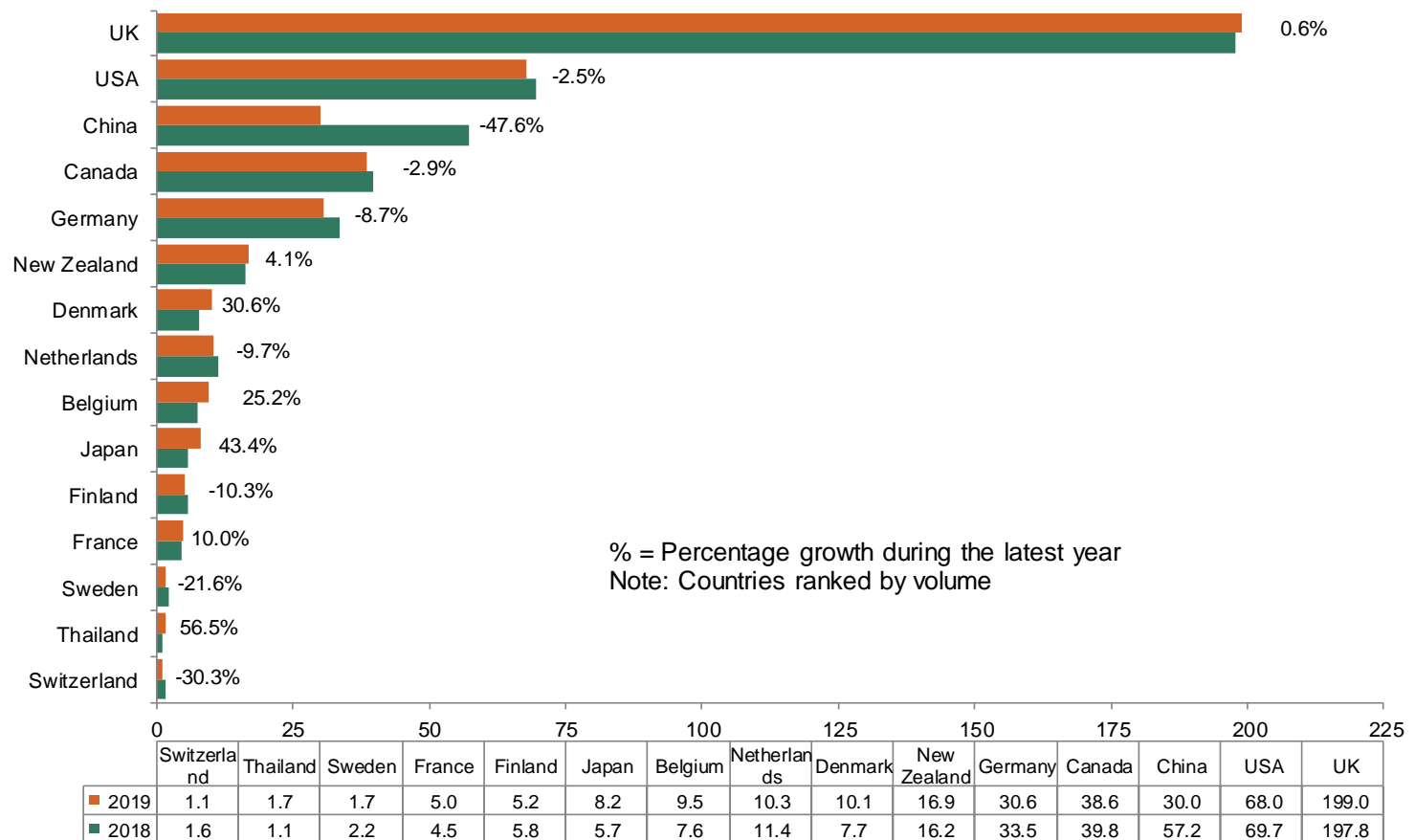
Value (million A\$) for MAT June 2019



	Switzerland	Thailand	Sweden	France	Finland	Japan	Belgium	Netherlands	Denmark	New Zealand	Germany	Canada	China	USA	UK
2019	1.5	2.1	3.2	6.5	7.1	9.8	10.0	11.6	12.2	21.4	36.2	42.6	68.5	80.4	214.5
2018	1.5	1.3	3.7	5.3	7.0	6.3	7.1	11.1	8.2	17.5	36.6	40.7	76.7	76.9	198.9

Unpackaged exports by top 15 destinations

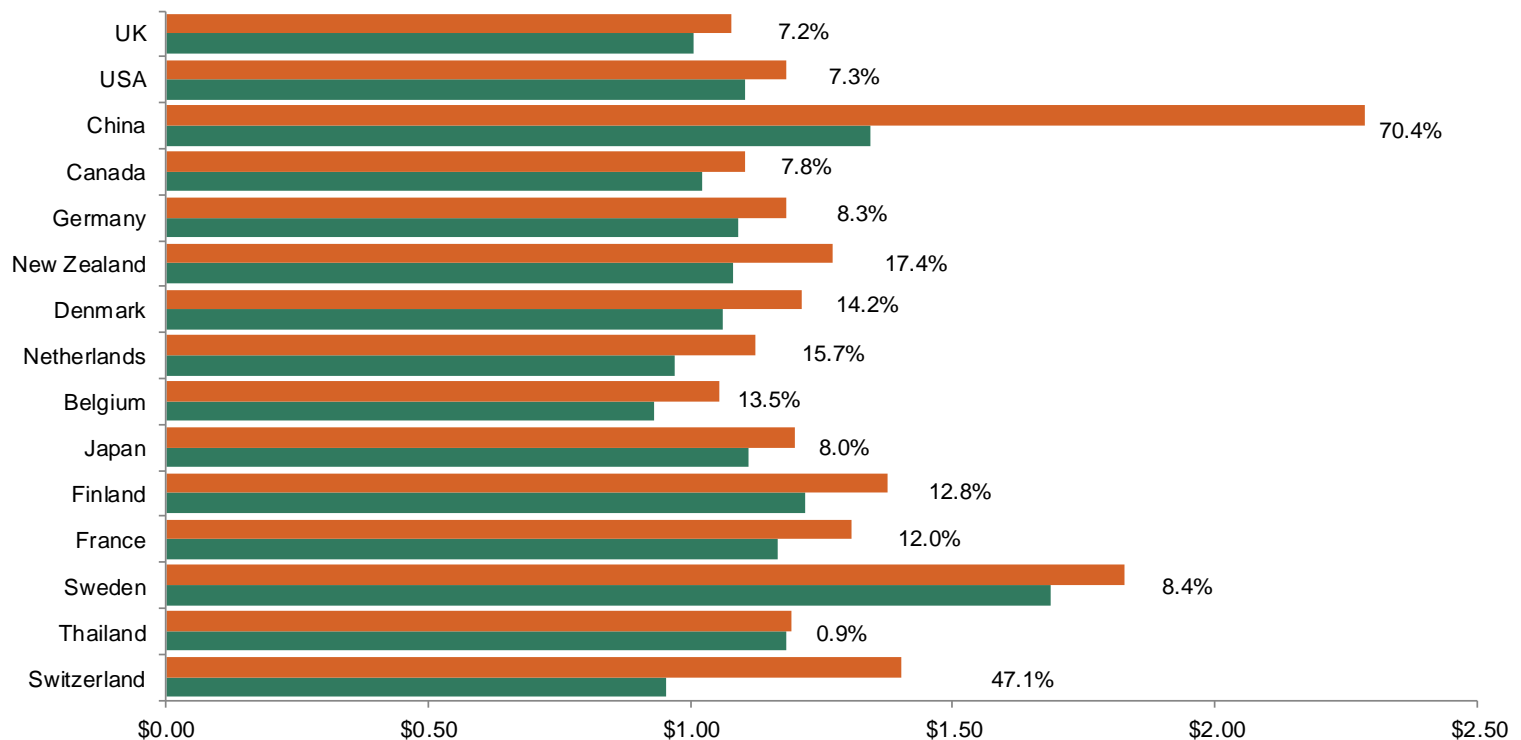
Volume (million litres) for MAT June 2019



Unpackaged exports by top 15 destinations

Average Value (A\$ per litre) for MAT June 2019

% = Percentage growth during the last year
Note: Destinations ranked by value



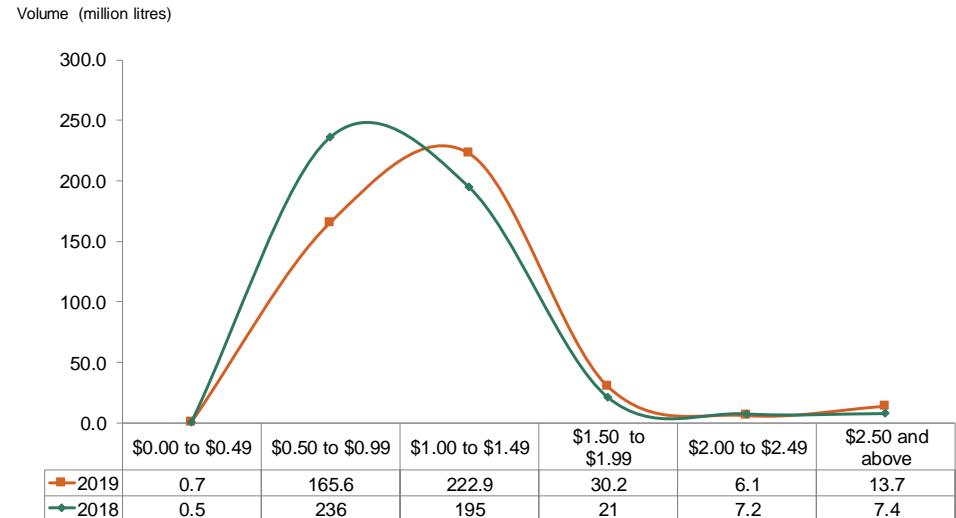
	Switzerland	Thailand	Sweden	France	Finland	Japan	Belgium	Netherlands	Denmark	New Zealand	Germany	Canada	China	USA	UK
2019	\$1.40	\$1.19	\$1.83	\$1.31	\$1.37	\$1.20	\$1.06	\$1.12	\$1.21	\$1.27	\$1.18	\$1.10	\$2.29	\$1.18	\$1.08
2018	\$0.95	\$1.18	\$1.69	\$1.17	\$1.22	\$1.11	\$0.93	\$0.97	\$1.06	\$1.08	\$1.09	\$1.02	\$1.34	\$1.10	\$1.01

Unpackaged exports by price point

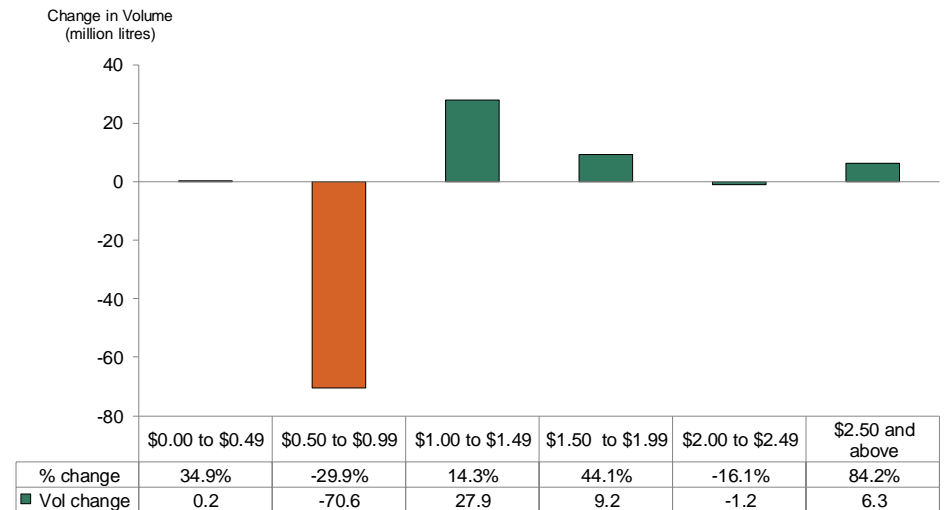
Volume

MAT June 2019

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