

Wine

Australia

providing
insights for

Australian

Wine

Western Australia

Export Report:

Bottled wine

MAT December 2016

Important Reading

- This report is updated quarterly.
- The data presented is an aggregation of the state's regions (see page 5)
- All data, unless specifically stated, is for the moving annual total (MAT), in other words for the last 12 months to the month ending that is stated on the front cover. All growth rates are for the annual change to this same period
- All data presented is for when the report's region is the primary GI which is labelled on the bottle. For example one bottle of Yarra Valley/King Valley blend will contribute 750ml towards the Yarra Valley report but will be excluded from the King Valley report
- A similar scenario will occur when the wine is not regionally identified. For example the same Yarra Valley/King Valley wine which is not identified with a GI on the bottle will be included in a report 'no label claim'
- Furthermore, this report is for bottled wine only and wine exported in bulk containers is not included.
- Therefore, this report will give the reader an overview of what is being identified as originating from a region for marketing type purposes, while not providing a full picture of all wine that has been produced and exported from a specific region.

Disclaimer: While Wine Australia makes every effort to ensure the accuracy and currency of information within this report, we accept no responsibility for information, which may later prove to be misrepresented or inaccurate, or reliance placed on that information by readers.

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

State by state exports

(based on state of headquarter)

State of HQ	MAT December 2016		Change	
	Value AUD	Litres	Value AUD	Litres
SA	\$1,416,877,408	513,466,108	6%	2%
NSW	\$495,710,965	141,646,926	6%	-4%
VIC	\$247,171,354	87,177,919	13%	1%
WA	\$41,092,495	6,026,921	24%	31%
QLD	\$6,031,515	868,806	-3%	41%
TAS	\$1,378,305	99,161	-11%	2%
ACT	\$12,152,485	683,186	55%	9%
NT	\$9,628	1,404	-27%	-24%
Grand Total	\$2,220,424,156	749,970,430	7%	1%

Contents

All state GI claim exports – volume, value & avg. value	p4
Bottled exports over time – volume, value & avg. value	p5
Bottled exports by destination over time – volume & value	p6
Bottled exports by price point and destination – volume	p7
Bottled exports by colour/wine style – volume	p8
Bottled exports by colour/wine style – value	p9
Bottled exports by colour/wine style – average value	p10
Bottled exports by top 15 destinations – volume	p11
Bottled exports by top 15 destinations – value	p12
Bottled exports by top 15 destinations – average value	p13
Total bottled exports by price point – volume	p14
Red bottled exports by price point – volume	p15
White bottled exports by price point – volume	p16
Bottled wine exports to no. 1 destination	p17
Bottled wine exports to no. 2 destination	p18
Bottled wine exports to no. 3 destination	p19
Bottled wine exports to no. 4 destination	p20
Bottled wine exports to no. 5 destination	p21

All state GI claims

Location claim	Volume		Value		Average Value	
	('000 litres)	Change	('000 AUD)	Change	AUD per litre	Change
Margaret River	2,280	18%	\$26,904	20%	\$11.80	2%
Western Australia	1,154	-5%	\$7,159	14%	\$6.21	20%
Frankand River	384	28%	\$3,278	29%	\$8.54	1%
Geographe	216	210%	\$1,481	143%	\$6.86	-22%
Great Southern	195	-17%	\$1,942	-13%	\$9.94	5%
South West Australia	94	-20%	\$723	-15%	\$7.73	5%
Swan Valley	50	8%	\$384	6%	\$7.68	-2%
Manjimup	31	17%	\$242	24%	\$7.89	6%
Pemberton	31	-50%	\$371	-42%	\$12.10	16%
Mount Barker	30	-22%	\$358	-27%	\$11.94	-6%
Blackwood Valley	30	1405%	\$224	1563%	\$7.56	10%
Perth Hills	18	2%	\$144	93%	\$8.10	89%
Frankland	18	1090%	\$189	915%	\$10.78	-15%
Denmark	9	225%	\$135	223%	\$14.70	-1%
Porongurup	6	111%	\$86	90%	\$14.23	-10%
Swan District	3	36%	\$35	19%	\$10.86	-12%
Peel	2	-54%	\$21	10%	\$11.68	139%
Albany	1	71%	\$35	96%	\$28.75	15%
Gingin	1		\$4		\$5.56	na
Cowaramup		-100%		-100%		

GI claims over time

	Volume		Value		Average Value AUD per	
	'000 litres	Change	'000 AUD	Change	litre	Change
MAT December 2008	5,548	-25%	\$48,249	-21%	\$8.70	5%
MAT December 2009	5,373	-3%	\$42,136	-13%	\$7.84	-10%
MAT December 2010	4,835	-10%	\$39,372	-7%	\$8.14	4%
MAT December 2011	5,522	14%	\$42,538	8%	\$7.70	-5%
MAT December 2012	5,707	3%	\$46,044	8%	\$8.07	5%
MAT December 2013	5,308	-7%	\$43,277	-6%	\$8.15	1%
MAT December 2014	4,411	-17%	\$37,744	-13%	\$8.56	5%
MAT December 2015	4,081	-7%	\$36,995	-2%	\$9.06	6%
MAT December 2016	4,551	12%	\$43,716	18%	\$9.61	6%

GI claims by country

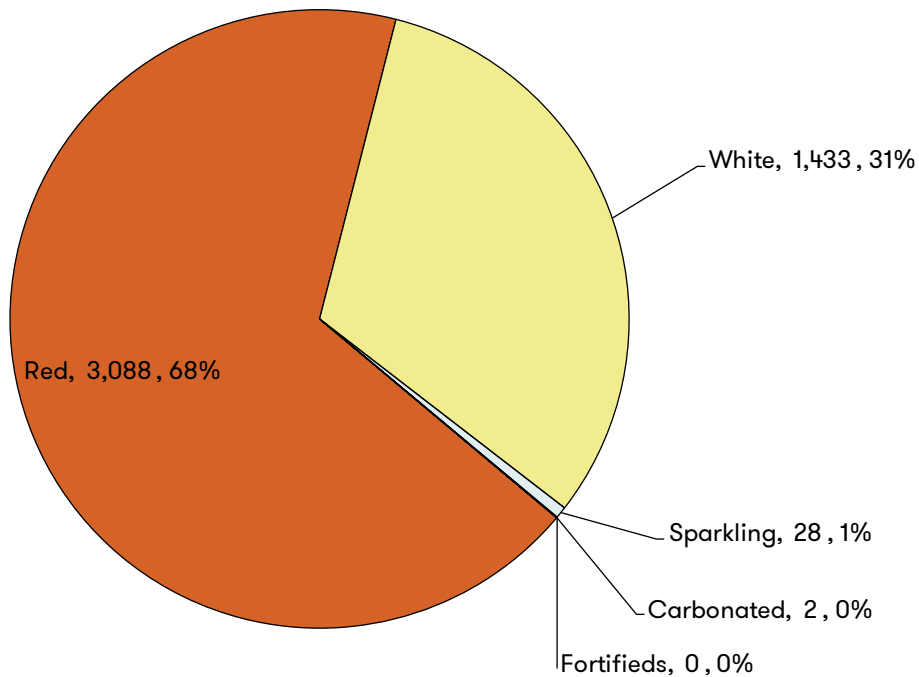
	MAT December									
	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
Volume ('000 litres)										
Canada	683	380	300	326	474	370	327	281	218	195
China, Pr	275	337	826	892	1,093	1,713	1,726	1,302	1,300	1,463
Denmark	118	99	84	82	85	89	76	98	69	82
Finland	10	2	19	12	80	106	81	70	90	108
France	67	79	38	60	69	61	116	58	38	49
Hong Kong	300	347	711	335	433	710	568	483	299	342
Japan	196	126	162	151	125	111	122	86	79	76
Malaysia	115	116	72	41	90	72	56	67	76	51
New Zealand	137	64	87	69	52	64	57	114	73	100
Ship	38	33	58	48	70	90	107	33	84	119
Singapore	351	263	268	311	247	305	226	263	264	299
Thailand	69	67	45	69	66	100	67	72	52	103
United Arab Emirates	122	194	141	110	70	77	255	72	85	149
United Kingdom	2,066	1,542	1,066	1,243	1,509	1,018	692	732	785	662
United States Of America	1,963	1,154	944	590	559	409	509	449	342	526
Value ('000 AUD)										
Canada	6,591	3,844	3,101	3,005	3,894	3,367	2,603	2,501	2,225	2,247
China, Pr	2,165	3,129	5,372	6,381	8,336	13,571	13,347	9,987	9,360	11,739
Denmark	1,000	886	523	607	691	654	572	712	616	704
Finland	48	14	144	49	492	655	508	562	678	786
France	700	884	448	783	782	623	1,218	656	414	531
Hong Kong	2,455	3,049	3,248	2,743	3,304	4,129	3,338	3,196	2,598	3,187
Japan	2,291	1,536	1,969	1,833	1,461	1,776	1,301	1,048	1,027	919
Malaysia	886	1,028	605	444	796	804	677	684	809	564
New Zealand	1,194	645	747	649	484	599	525	922	646	846
Ship	534	542	672	555	865	965	1,031	338	667	1,032
Singapore	3,633	3,198	3,641	3,484	2,788	3,751	2,921	3,270	3,399	3,874
Thailand	481	551	336	539	541	701	602	554	452	912
United Arab Emirates	1,046	1,692	1,566	991	821	854	2,246	910	868	1,236
United Kingdom	14,876	11,391	7,579	8,466	9,194	6,814	5,013	5,946	6,783	6,110
United States Of America	15,183	8,749	7,053	4,207	3,625	2,959	4,121	4,059	3,998	6,247

Bottled exports by price point and destination

	\$2.49 and under		\$2.50 to \$4.99		\$5.00 to \$7.49		\$7.50 to \$9.99		\$10 to \$19.99		Above \$20		Total	
	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)	('000 litres)	(%)
China, Pr	35.4	na	371.9	-5%	471.6	-5%	220.2	78%	303.4	23%	60.9	51%	1,463.3	16%
Canada	-	-100%	3.6	-83%	19.8	-59%	42.0	51%	124.1	9%	5.3	-27%	194.8	-7%
United Kingdom	-	na	61.9	-58%	262.8	-18%	146.5	7%	163.4	12%	27.2	-18%	661.8	-12%
United States Of America	0.5	na	13.4	117%	63.6	25%	127.8	-26%	290.0	231%	31.2	30%	526.4	65%
Hong Kong	0.5	2400%	43.7	-54%	165.0	94%	23.1	-25%	90.7	27%	18.9	16%	341.9	21%
Japan	0.0	na	-	-100%	19.9	59%	22.3	-10%	26.7	-16%	7.6	-21%	76.5	10%
New Zealand	-	na	10.7	-17%	42.6	60%	27.3	48%	18.1	51%	1.5	-49%	100.3	44%
Denmark	-	na	4.4	507%	22.1	-13%	40.2	21%	13.3	77%	1.9	10%	81.9	22%
Malaysia	-	na	3.0	-39%	10.6	-56%	16.1	-3%	17.6	-31%	3.7	-25%	51.0	-28%
Singapore	0.9	733%	4.9	-1%	22.1	-11%	30.5	-38%	217.1	34%	23.0	0%	298.5	24%
Finland	-	na	-	na	69.6	-8%	36.7	1878%	1.8	-85%	-	-100%	108.0	21%
France	-	na	-	na	-	na	25.3	58%	22.4	15%	1.4	-35%	49.2	38%
Ship	-	na	1.2	-61%	59.4	34%	15.4	-12%	41.6	145%	1.1	-31%	118.8	45%
Thailand	-	na	14.2	339%	26.4	17%	27.2	134%	34.5	161%	0.5	-53%	102.8	103%
United Arab Emirates	-	na	88.9	na	10.9	-66%	9.3	-27%	31.2	-15%	8.6	158%	148.8	83%
Other	0.3	-70%	0.9	-95%	40.0	-35%	61.7	22%	101.9	28%	22.2	54%	226.9	7%
Total	37.4	3395%	622.8	-13%	1,306.3	-3%	871.6	17%	1,497.7	38%	215.1	15%	4,550.9	17%

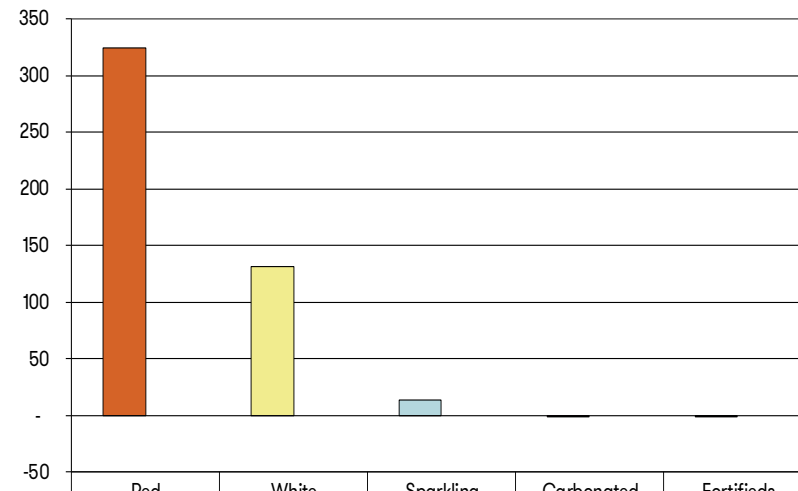
Bottled exports by colour/wine style

Volume ('000 litres)



Change in volume

Volume change ('000 litres)

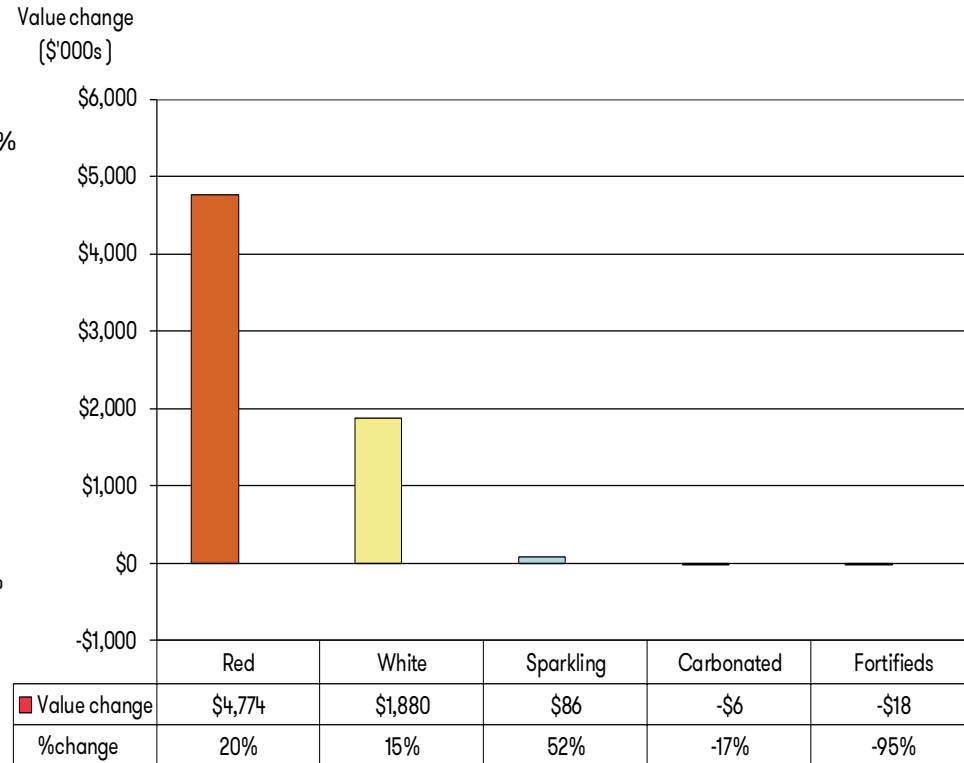
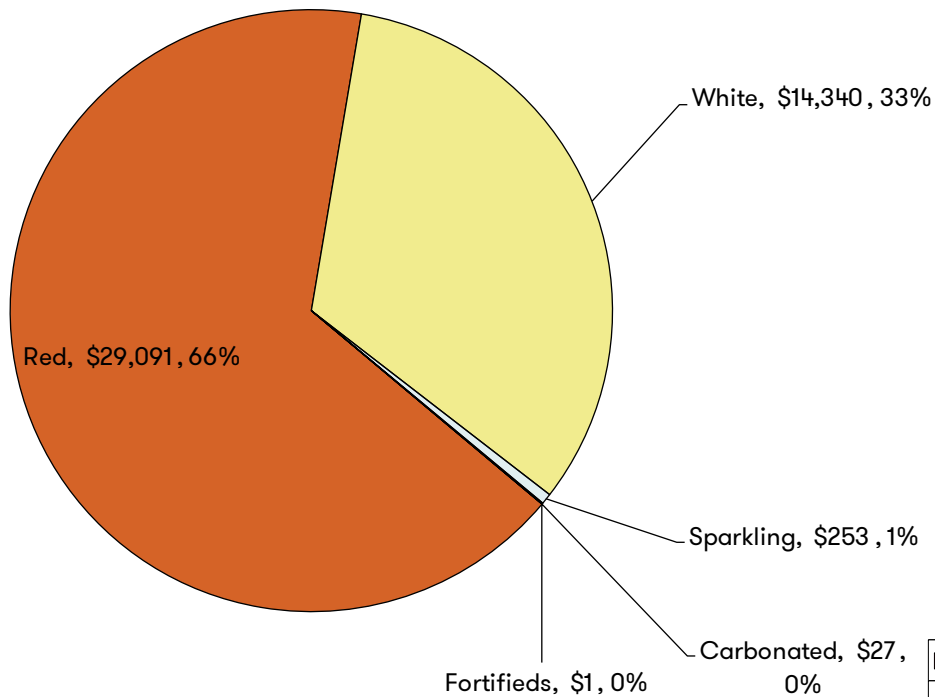


	Red	White	Sparkling	Carbonated	Fortifieds
Volume change	325	132	14	-0	-0
%change	12%	10%	95%	-22%	-93%

Bottled exports by colour/wine style

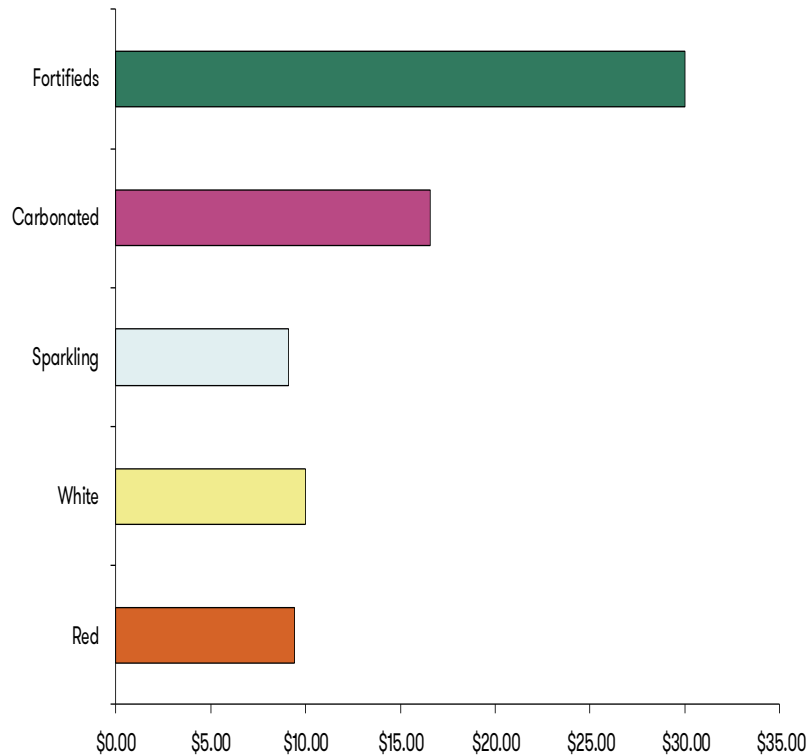
Value ('000 AUD)

Change in value

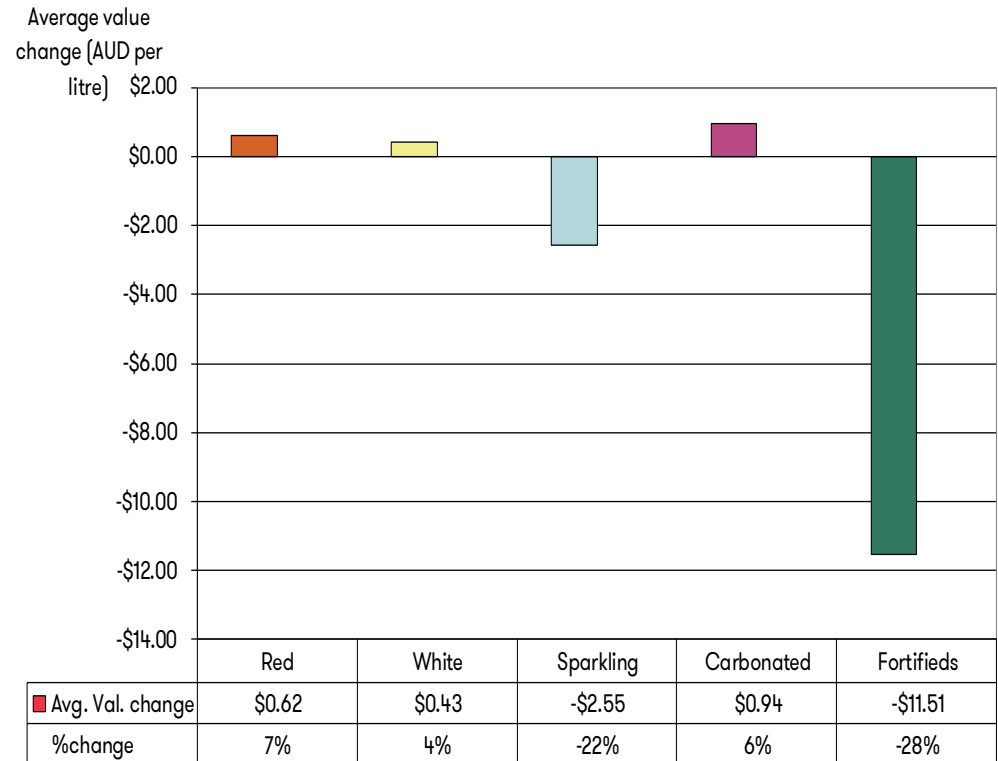


Bottled exports by colour/wine style

Average value (AUD per litre)

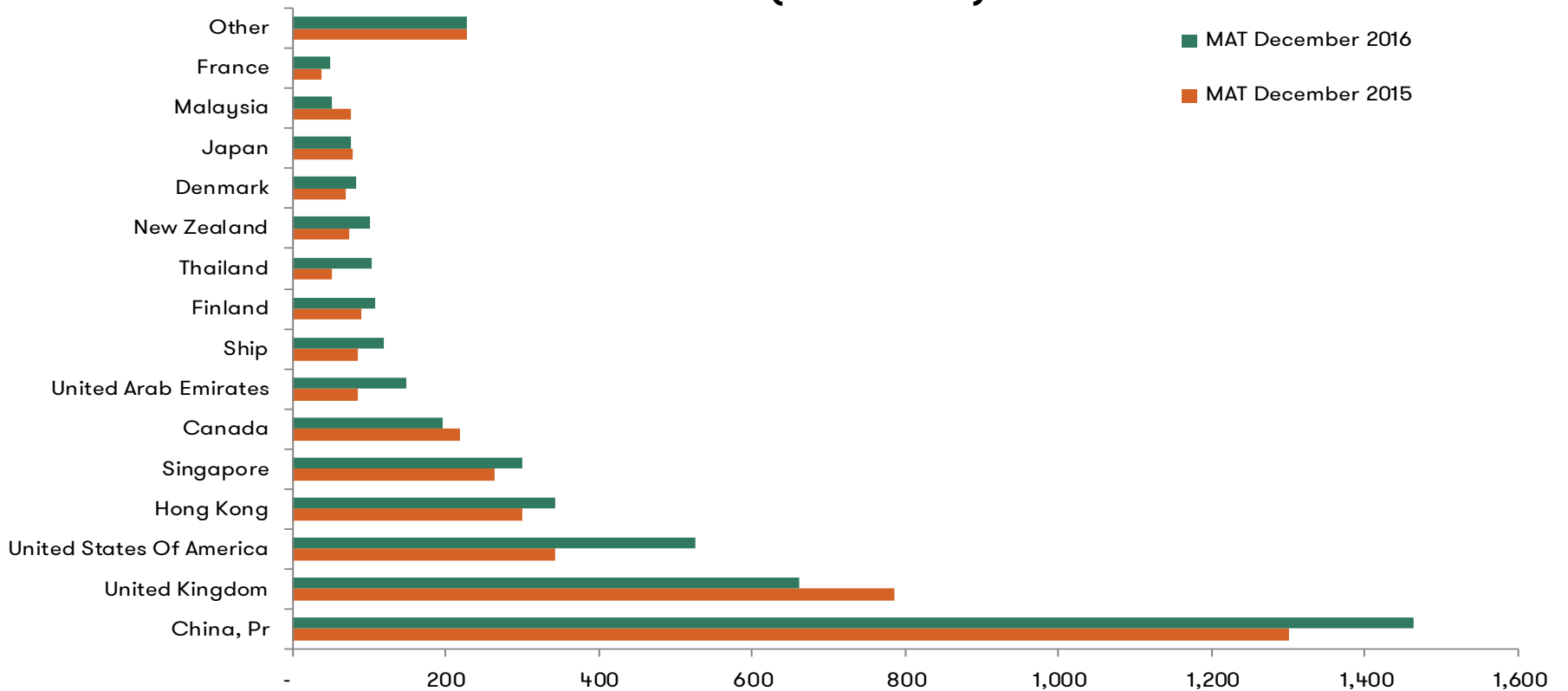


Change in average value



Bottled exports by top 15 destinations

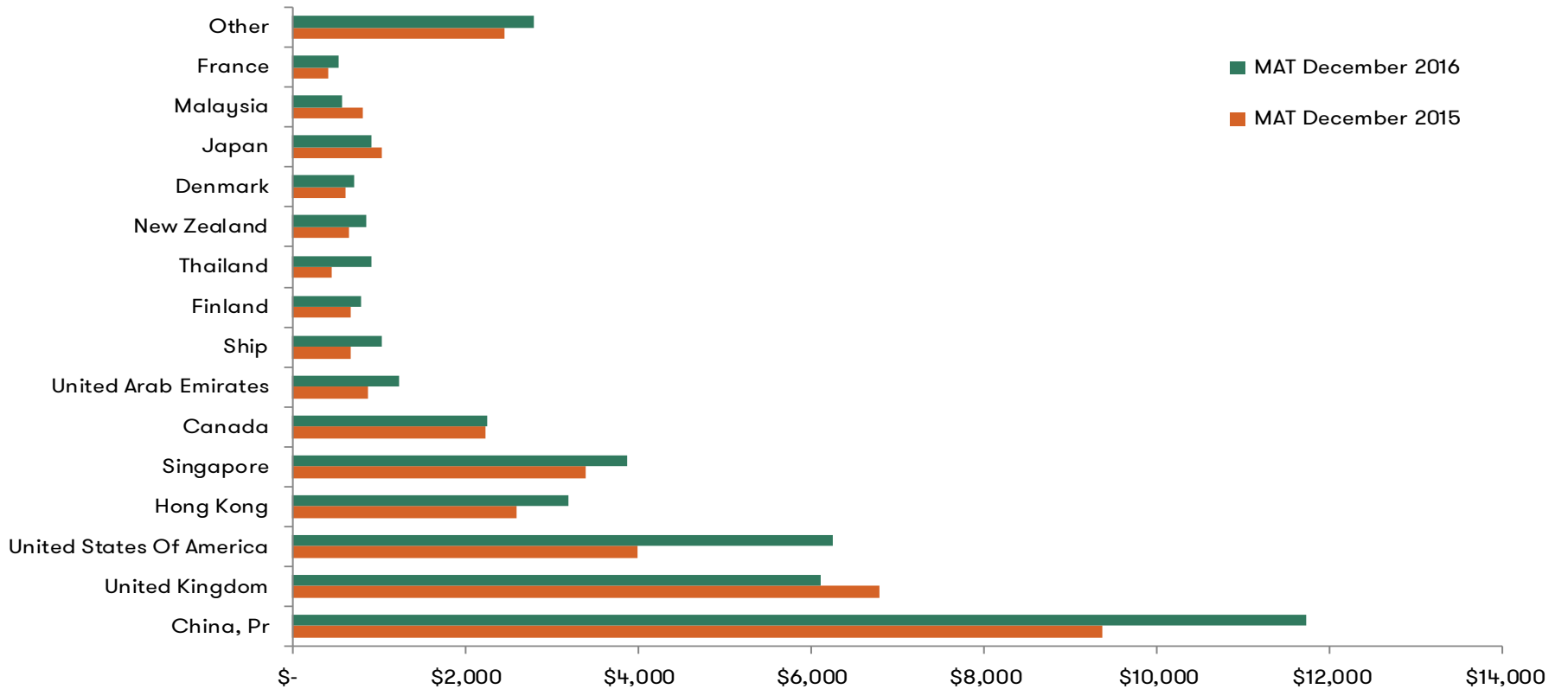
Volume ('000 litres)



	China, Pr	United Kingdom	United States Of America	Hong Kong	Singapore	Canada	United Arab Emirates	Ship	Finland	Thailand	New Zealand	Denmark	Japan	Malaysia	France	Other
■ MAT December 2016	1,463	662	526	342	299	195	149	119	108	103	100	82	76	51	49	227
■ MAT December 2015	1,300	785	342	299	264	218	85	84	90	52	73	69	79	76	38	227

Bottled exports by top 15 destinations

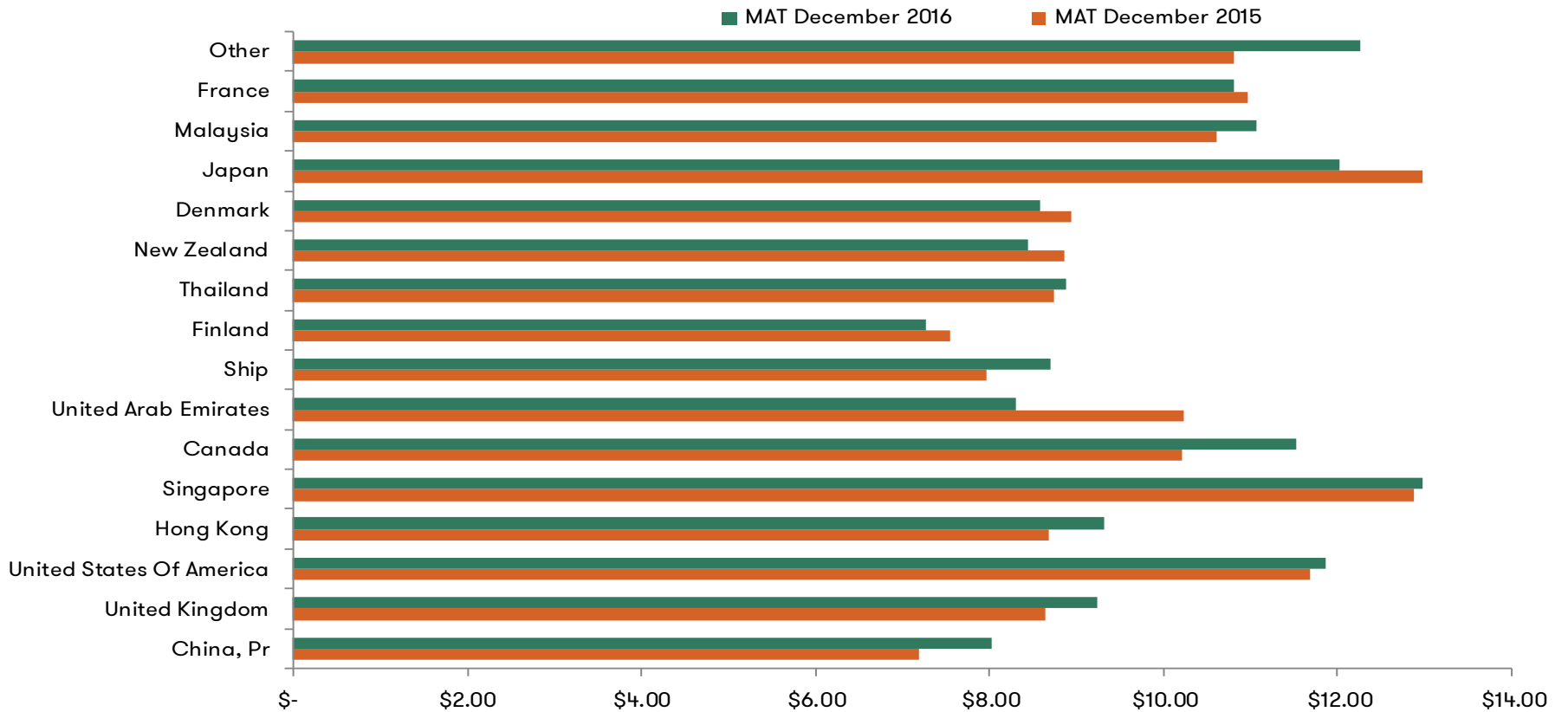
Value ('000 AUD)



	China, Pr	United Kingdo m	United States Of Americ a	Hong Kong	Singap ore	Canad a	United Arab Emirate s	Ship	Finland	Thailan d	New Zealan d	Denma rk	Japan	Malays ia	France	Other
■ MAT December 2016	\$11,73	\$6,110	\$6,247	\$3,187	\$3,374	\$2,247	\$1,236	\$1,032	\$786	\$912	\$846	\$704	\$919	\$564	\$531	\$2,783
■ MAT December 2015	\$9,360	\$6,783	\$3,998	\$2,598	\$3,399	\$2,225	\$868	\$667	\$678	\$452	\$646	\$616	\$1,027	\$809	\$414	\$2,456

Bottled exports by top 15 destinations

Average Value (AUD per litre)

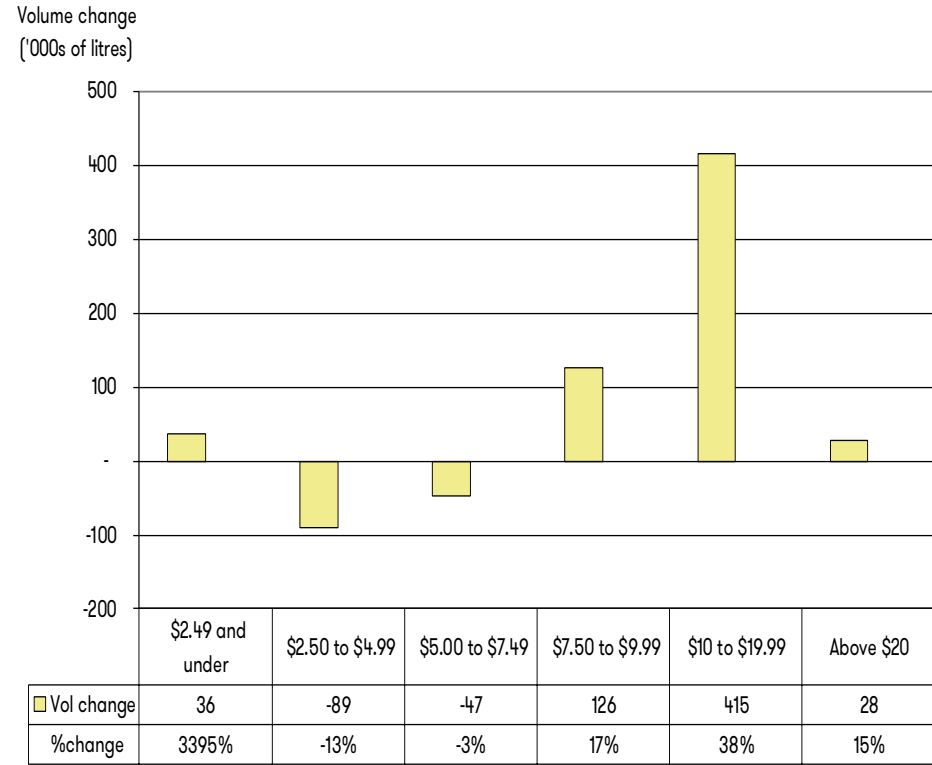
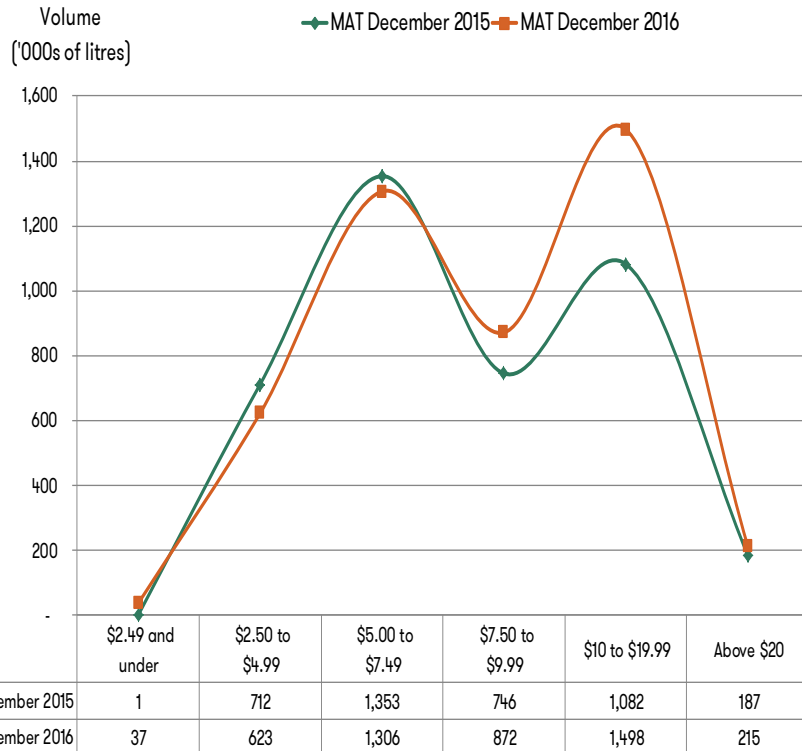


	China, Pr	United Kingdom	United States Of America	Hong Kong	Singapore	Canada	United Arab Emirates	Ship	Finland	Thailand	New Zealand	Denmark	Japan	Malaysia	France	Other
■ MAT December 2016	\$8.02	\$9.23	\$11.87	\$9.32	\$12.98	\$11.53	\$8.30	\$8.69	\$7.28	\$8.87	\$8.44	\$8.59	\$12.02	\$11.06	\$10.80	\$12.26
■ MAT December 2015	\$7.20	\$8.64	\$11.67	\$8.68	\$12.88	\$10.22	\$10.24	\$7.96	\$7.54	\$8.74	\$8.86	\$8.94	\$12.98	\$10.62	\$10.96	\$10.81

Bottled exports by price point

Volume ('000 litres)

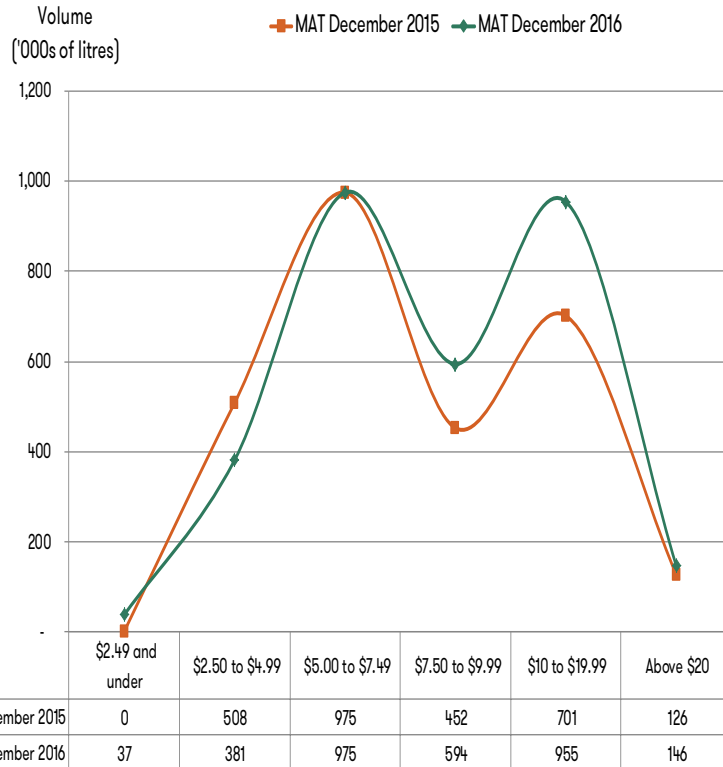
Change in volume



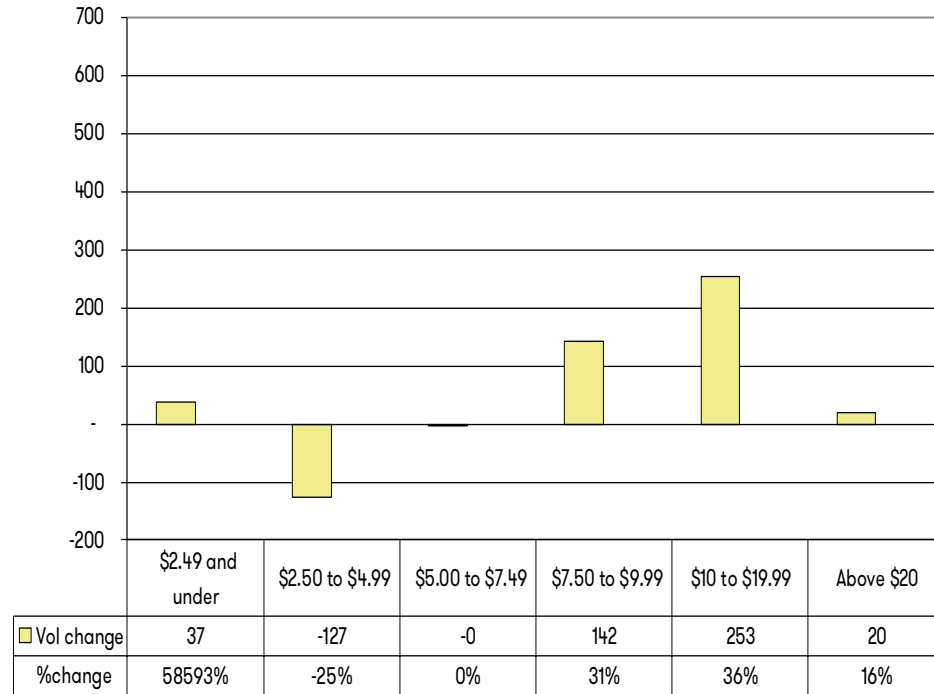
Bottled red wine exports by price point

Volume ('000 litres)

Change in volume



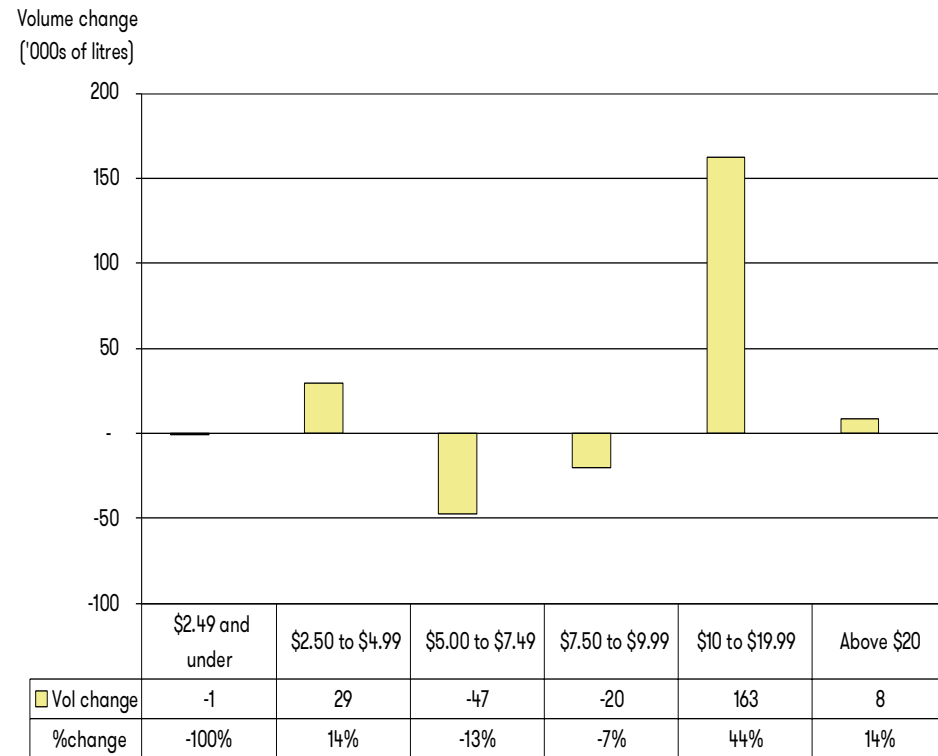
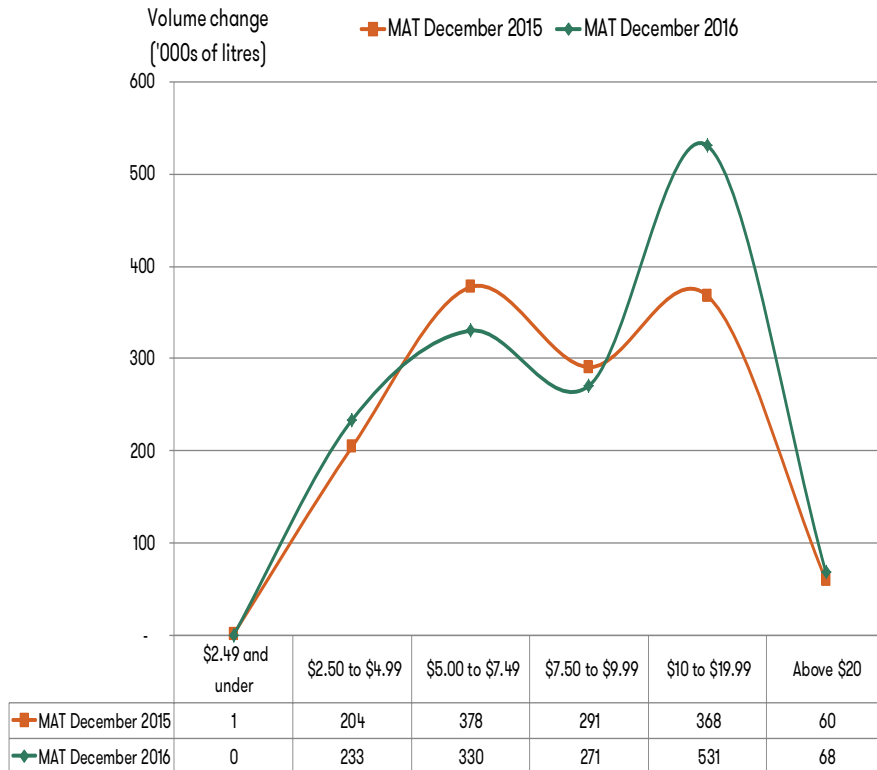
Volume change ('000s of litres)



Bottled white wine exports by price point

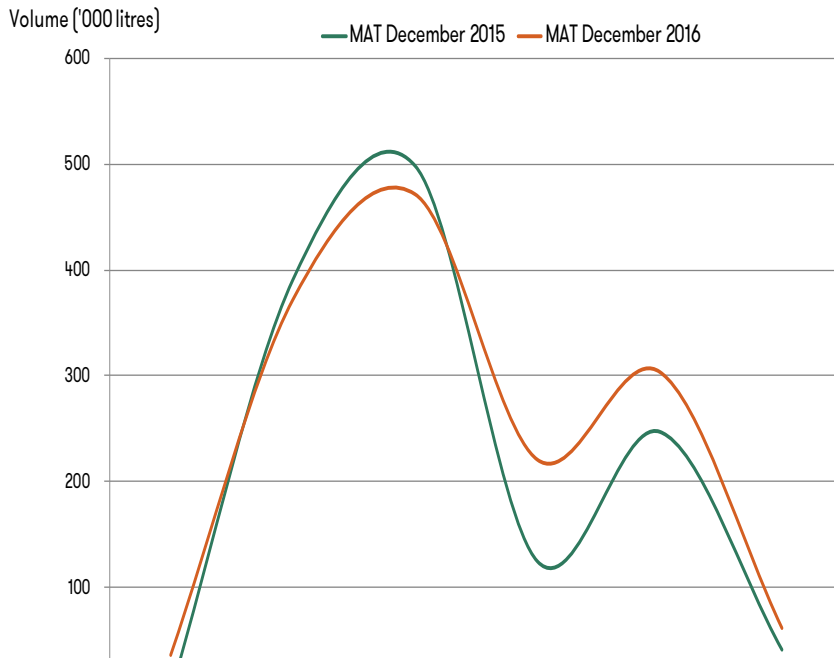
Volume ('000 litres)

Change in volume



Bottled wine exports to China, Pr

Total wine by price point

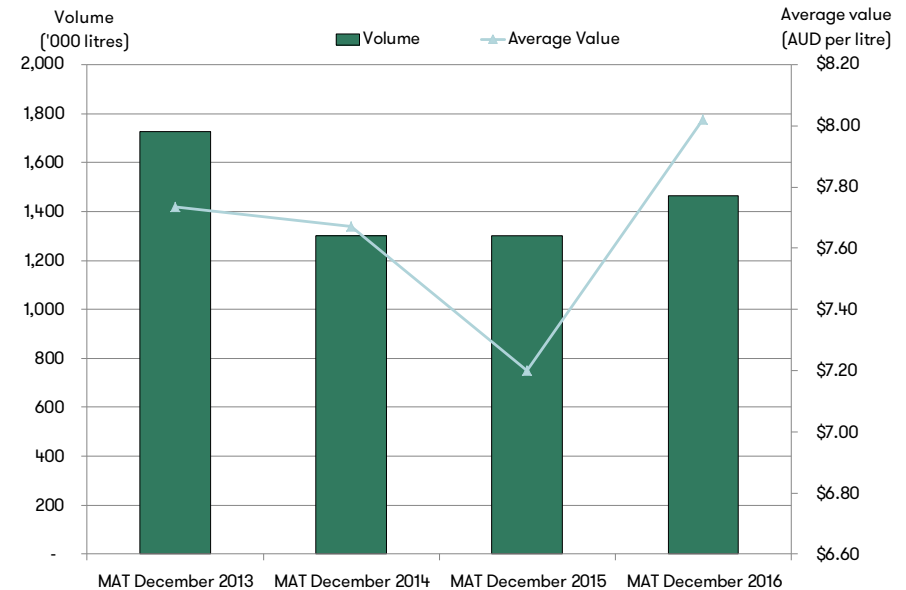


	\$2.49 and under	\$2.50 to \$4.99	\$5.00 to \$7.49	\$7.50 to \$9.99	\$10 to \$19.99	Above \$20
MAT December 2015	-	390,757	498,423	123,984	246,730	40,365
MAT December 2016	35,352	371,883	471,551	220,247	303,417	60,857

Overview

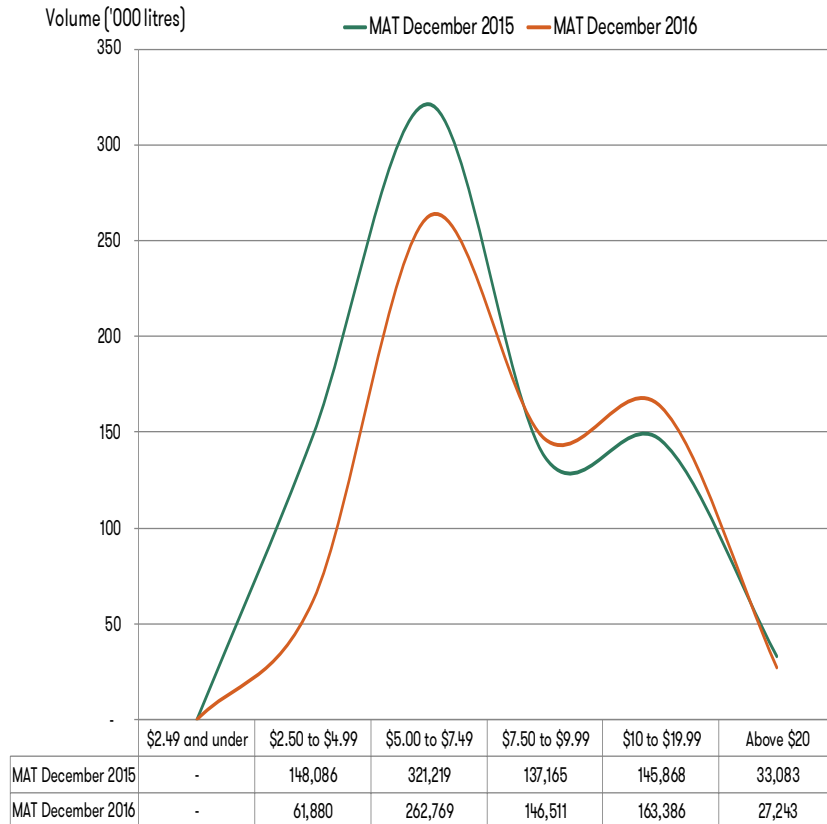
		MAT December 2015	MAT December 2016	Change
Red wine	Volume (litres)	1,110,046	1,283,585	16%
	Value (AUD)	\$8,202,969	\$10,361,414	26%
	Average value	\$7.39	\$8.07	9%
White wine	Volume (litres)	180,057	163,292	-9%
	Value (AUD)	\$1,027,029	\$1,247,694	21%
	Average value	\$5.70	\$7.64	34%
Total wine	Volume (litres)	1,300,260	1,463,305	13%
	Value (AUD)	9,360,419	11,738,629	25%
	Average value	\$7.20	\$8.02	11%

Total volume and average value



Bottled wine exports to United Kingdom

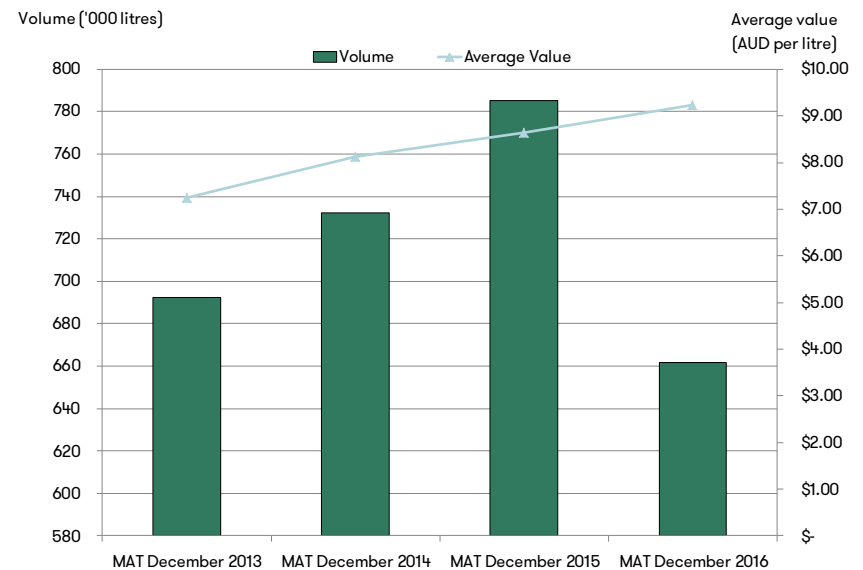
Total wine by price point



Overview

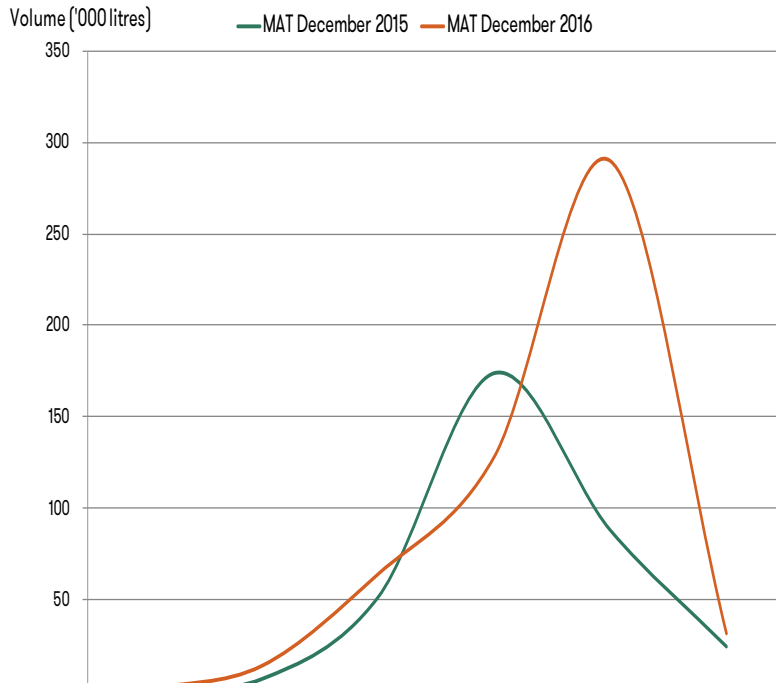
		MAT December 2015	MAT December 2016	Change
Red wine	Volume (litres)	469,619	364,334	-22%
	Value (AUD)	\$3,856,094	\$3,541,736	-8%
	Average value	\$8.21	\$9.72	18%
White wine	Volume (litres)	313,776	295,389	-6%
	Value (AUD)	\$2,904,233	\$2,546,047	-12%
	Average value	\$9.26	\$8.62	-7%
Total wine	Volume (litres)	785,420	661,788	-16%
	Value (AUD)	\$6,782,946	\$6,110,176	-10%
	Average value	\$8.64	\$9.23	7%

Total volume and average value



Bottled wine exports to United States Of America

Total wine by price point

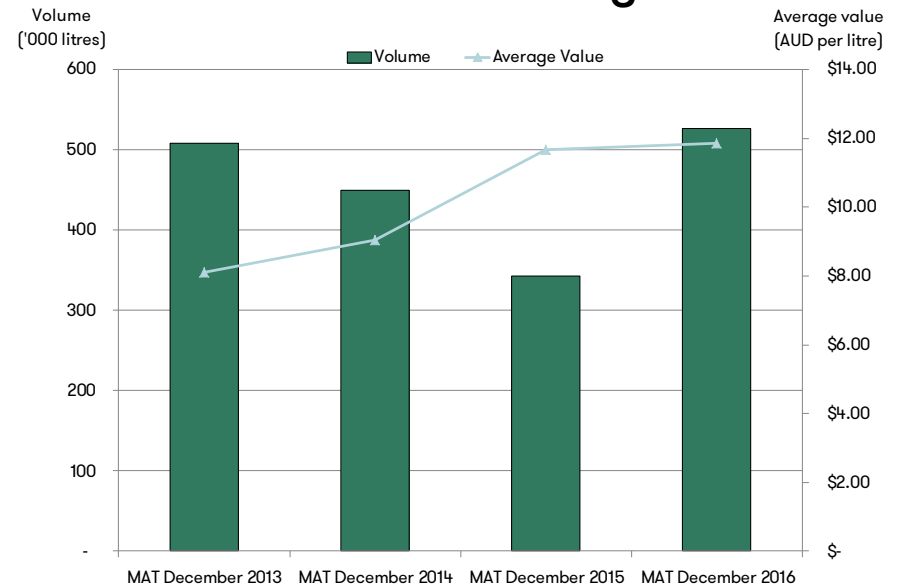


	\$2.49 and under	\$2.50 to \$4.99	\$5.00 to \$7.49	\$7.50 to \$9.99	\$10 to \$19.99	Above \$20
MAT December 2015	-	6,174	50,886	173,718	87,719	23,954
MAT December 2016	455	13,392	63,596	127,791	289,976	31,182

Overview

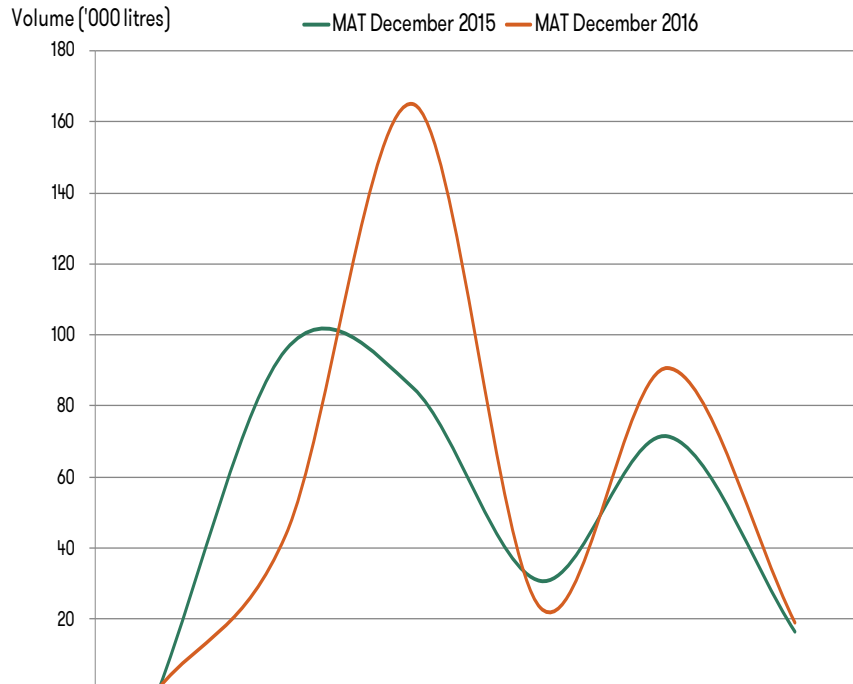
		MAT December 2015	MAT December 2016	Change
Red wine	Volume (litres)	172,751	269,659	56%
	Value (AUD)	\$1,926,043	\$2,960,813	54%
	Average value	\$11.15	\$10.98	-2%
White wine	Volume (litres)	169,700	255,869	51%
	Value (AUD)	\$2,071,743	\$3,276,039	58%
	Average value	\$12.21	\$12.80	5%
Total wine	Volume (litres)	342,450	526,392	54%
	Value (AUD)	\$3,997,786	\$6,246,599	56%
	Average value	\$11.67	\$11.87	2%

Total volume and average value



Bottled wine exports to Hong Kong

Total wine by price point

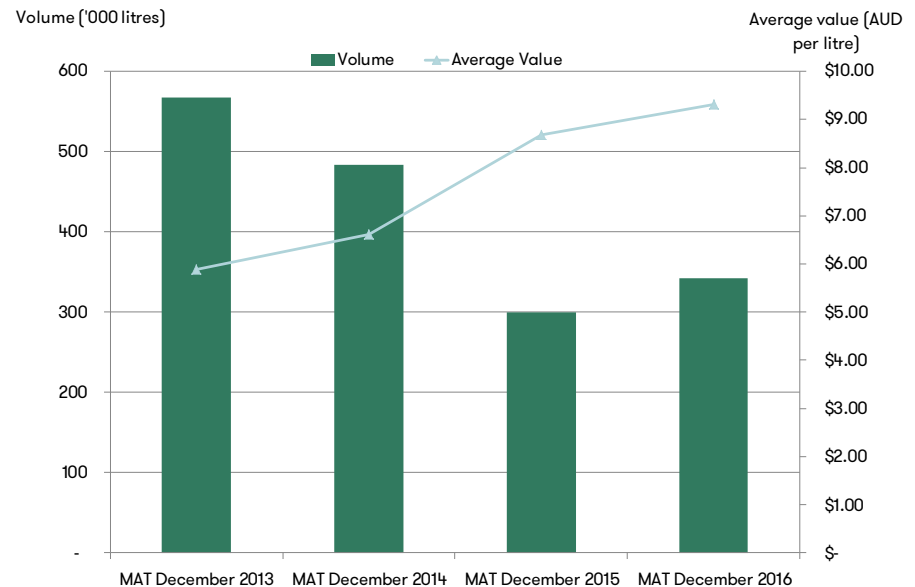


	\$2.49 and under	\$2.50 to \$4.99	\$5.00 to \$7.49	\$7.50 to \$9.99	\$10 to \$19.99	Above \$20
MAT December 2015	18	95,841	85,059	30,696	71,419	16,383
MAT December 2016	450	43,722	165,015	23,128	90,671	18,936

Overview

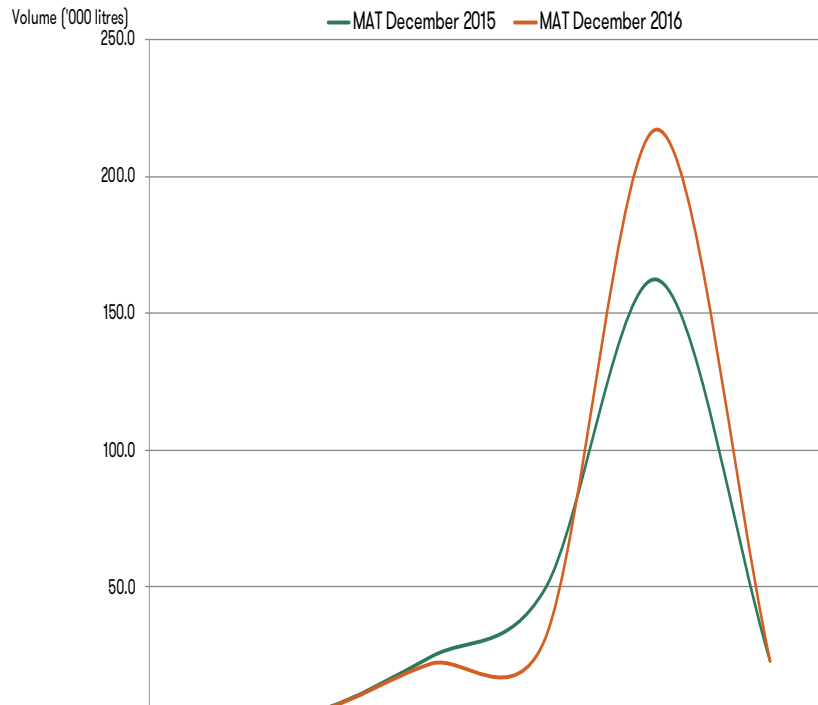
		MAT December 2015	MAT December 2016	Change
Red wine	Volume (litres)	198,136	264,554	34%
	Value (AUD)	\$1,584,765	\$2,308,962	46%
	Average value	\$8	\$9	9%
White wine	Volume (litres)	101,190	76,356	-25%
	Value (AUD)	\$1,012,125	\$863,321	-15%
	Average value	\$10.00	\$11.31	13%
Total wine	Volume (litres)	299,415	341,922	14%
	Value (AUD)	\$2,598,490	\$3,187,179	23%
	Average value	\$8.68	\$9.32	7%

Total volume and average value



Bottled wine exports to Singapore

Total wine by price point

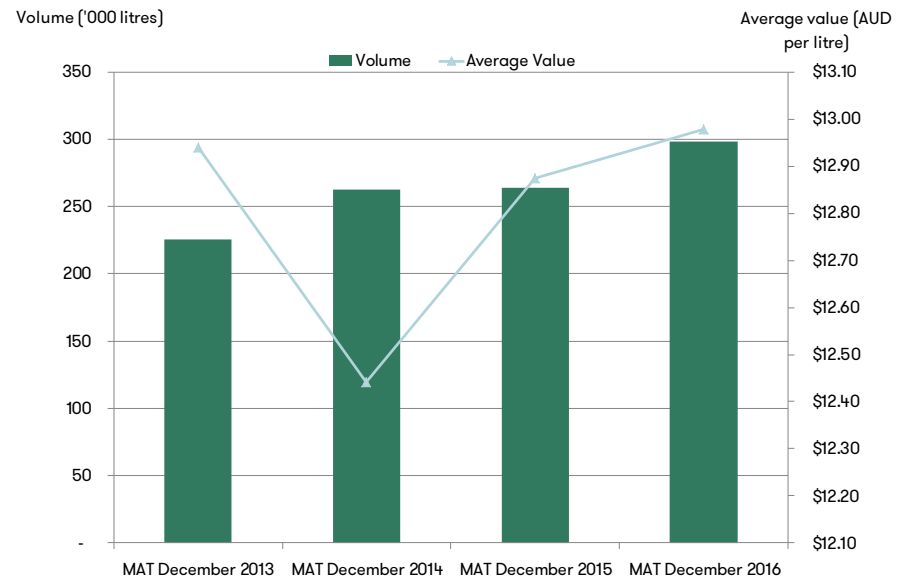


	\$2.49 and under	\$2.50 to \$4.99	\$5.00 to \$7.49	\$7.50 to \$9.99	\$10 to \$19.99	Above \$20
MAT December 2015	108	4,973	24,702	49,010	162,230	23,006
MAT December 2016	900	4,932	22,082	30,537	217,082	23,016

Overview

		MAT December 2015	MAT December 2016	Change
Red wine	Volume (litres)	150,266	172,668	15%
	Value (AUD)	\$2,059,246	\$2,346,641	14%
	Average value	\$13.70	\$13.59	-1%
White wine	Volume (litres)	112,583	124,567	11%
	Value (AUD)	\$1,324,831	\$1,514,018	14%
	Average value	\$11.77	\$12.15	3%
Total wine	Volume (litres)	264,027	298,549	13%
	Value (AUD)	\$3,399,408	\$3,874,496	14%
	Average value	\$12.88	\$12.98	1%

Total volume and average value



Notes & Definitions

Export approvals: Wine approved by Wine Australia for export on specified dates. Exports reported in this document refer to the date wine is shipped and not the date of approval. Note that the AUD FOB value of wine reported in this document may differ from export values reported by the Australian Bureau of Statistics (ABS). The divergence between the two values derives from differences between Wine Australia and the ABS in the method of converting the value of exports denominated in foreign currency to AUD. In the case of the Australia, the exporter makes the conversion when submitting wine for export approval while the ABS converts the value on the day of shipment, at the daily conversion rate. With the Wine Australia method, it is expected that some of the conversions will occur at hedged rates while this does not occur with the ABS method. When the Australian exchange rate is moving significantly the alternative methods will result in diverging valuations. Volumes reported by Wine Australia and the ABS differ only marginally due to the 'approval' versus 'shipment' basis of reporting as well as marginal differences in scope and definition.

MAT: Moving annual total - refers to the twelve months to the end of the nominated month.

% Change : Is calculated as the percentage change in the MAT for the immediate past 12 months compared to the preceding 12 months.

Formula: % Change = $\left(\frac{\text{current MAT} - \text{preceding MAT}}{\text{preceding MAT}}\right) \times 100$

AUD: Australian dollars

FOB: 'Free on board' value of the wine, where the point of valuation is where goods are placed on board the international carrier, at the border of the exporting country. The FOB value includes production and other costs up until placement on the international carrier but excludes international insurance and transport costs.

Country: In most instances, this indicates where the wine is consumed. In some instances, it may be the country at which the wine is off-loaded for bottling and/or trans-shipment to the country of final consumption.

GI: Geographical indications identify wines as originating in a region or locality.

Notes & Definitions (continued)

Still wine: Still wine in bottles, casks, flagons or bulk containers.

Bulk: Wine shipped for repackaging elsewhere. This may involve containers with a capacity of 20 litres or more but will most often mean large shipping containers ranging in size between 10 000 and 24 000 litres.

Cask or soft packs: Plastic containers within cardboard outers usually carrying between 2 and 20 litres.

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.