

**Wine
Australia**

Export Report

12 months to 31 December 2024

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Executive Summary

- Australian wine exports increased by 34 per cent in value to \$2.55 billion and 7 per cent in volume to 649 million litres.
- The growth in exports was driven by high levels of shipments to mainland China after the removal of import tariffs on Australian bottled wine in March 2024.
- In the period between April and December 2024, 83 million litres of wine, worth \$902 million, have been exported to mainland China.
- The average value of packaged exports increased by 24 per cent to \$9.35 per litre FOB, a record value – also driven by the return to mainland China.
- Exports to the rest of the world declined by 13 per cent in value to \$1.64 billion and 7 per cent in volume to 565 million litres.
- The decline in value to the rest of the world was largely driven by Hong Kong after a large increase in shipments to this destination at the end of 2023 — likely due to some exporters anticipating the removal of import tariffs in mainland China.
- A decline in unpackaged wine exports to the United States after a period of heightened exports explains the volume decline to the US.
- Exports to the United Kingdom have stabilised somewhat post-COVID and Brexit, although headwinds remain in market.
- Shipments with an average value of \$5 per litre and above are driving an increase in export value to Canada.

Overview

In the 12 months ended December 2024, Australian wine exports increased by 34 per cent in value to \$2.55 billion¹, the highest value since June 2021. Total volume also increased by 7 per cent to 649 million litres. The average value of exports increased by 26 per cent to \$3.93 per litre free on board (FOB)², the highest average value since late 2020.

The increase in value was a result of high levels of shipments to mainland China between April and December 2024, after tariffs on Australian bottled wine were removed at the end of March 2024. In those nine months, 83 million litres of wine, worth \$902 million, have been exported to mainland China.

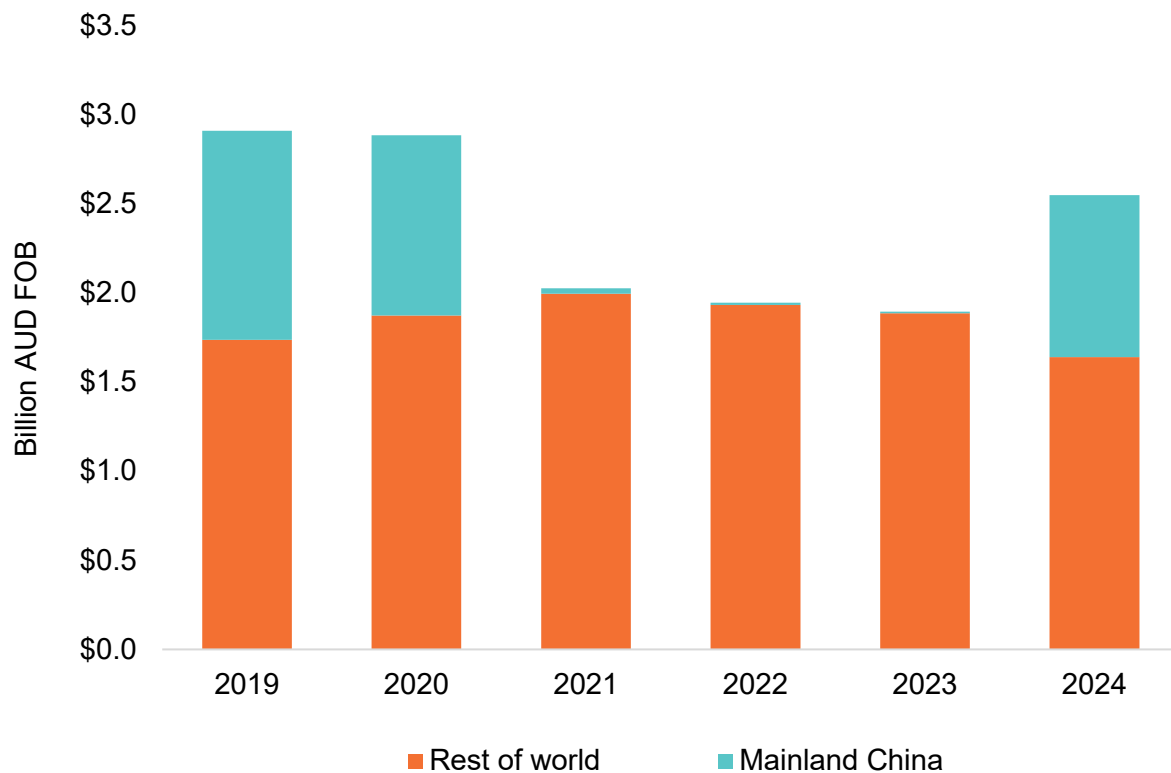
Australian wine exports to the rest of the world declined by 13 per cent in value to \$1.64 billion (see Figure 1) and 7 per cent in volume to 565 million litres during the 12 months to December 2024. The decline in value was largely driven by Hong Kong after a large increase in shipments to this destination at the end of 2023 — likely due to some Australian exporters anticipating the removal of import tariffs in mainland China. A decline in unpackaged wine exports to the United States after a period of heightened exports continues to explain the volume decline to the US.

¹ Unless otherwise stated all values are given in Australian dollars.

² All export wine values are the 'Free on board' (FOB) 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.

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Figure 1: Value of Australian wine exports



Outside of the unique circumstances relating to Australian exports to mainland China, global alcohol consumption is facing considerable headwinds, and this is impacting the results to other markets. According to IWSR, total recalled spend on alcohol in the top 15 largest markets declined in the first half of 2024, as consumers focus more on their health and cut back on spending due to cost of living pressures. Wine is experiencing some of the steepest declines, with the number of serves declining by 4 per cent compared to 2023 and 20 per cent compared to 2019.

Price points

Most of the increase in value was found on the higher end of the price spectrum – exports with an average value of \$5 per litre and above increased by 65 per cent in value and 39 per cent in volume. Mainland China was the primary driver of this growth, but also in exports to Canada and, to a lesser extent, New Zealand. While this price segment represents 62 per cent of the value of exports, it contributes only 13 per cent of the total volume shipped.

Exports with an average value below \$5 per litre also increased – by 4 per cent in value and 3 per cent in volume. Mainland China, Japan, Thailand, and Belgium were the main contributors to this growth. Meanwhile, exports to the United Kingdom, United States, Canada, Germany, and New Zealand all declined in this price segment. This price segment represents 87 per cent of the total volume shipped.

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Figure 2: Value of Australian exports by price segment

Price segment (A\$/litre)	MAT December 2024	Value change	Growth rate
\$2.49 and under	\$446	-\$4.6	-1%
\$2.50 to \$4.99	\$526	\$39	8%
\$5.00 to \$7.49	\$226	\$54	32%
\$7.50 to \$9.99	\$128	\$29	30%
\$10.00 to \$14.99	\$160	\$41	34%
\$15.00 to \$19.99	\$57	\$11	23%
\$20.00 to \$29.99	\$142	\$49	52%
\$30.00 to \$49.99	\$145	\$77	114%
\$50.00 to \$99.99	\$515	\$259	101%
\$100.00 to \$199.99	\$94	\$55	145%
\$200.00 and over	\$109	\$43	65%
Total value	\$2,548	\$653	34%

Container type

Exports of unpackaged wine (in bulk containers to be packaged in market) increased by 2 per cent in value to \$485 million and 2 per cent in volume to 428 million litres in the 12 months ended December 2024. The average value stayed the same at \$1.13 per litre FOB. An increase in unpackaged exports to mainland China, South Africa, Belgium, and Switzerland were partially offset by declines to the United States, Canada, the United Kingdom, and Germany.

Packaged exports (97 per cent of which are in glass bottle) increased by 45 per cent in value to \$2.06 billion and 17 per cent in volume to 221 million litres. The average value of packaged exports increased by 24 per cent to \$9.35 per litre FOB, a record value. The volume of packaged shipments increased to destinations including mainland China, Canada, Japan, and United Arab Emirates, while packaged exports declined to the United States, Netherlands, and Singapore.

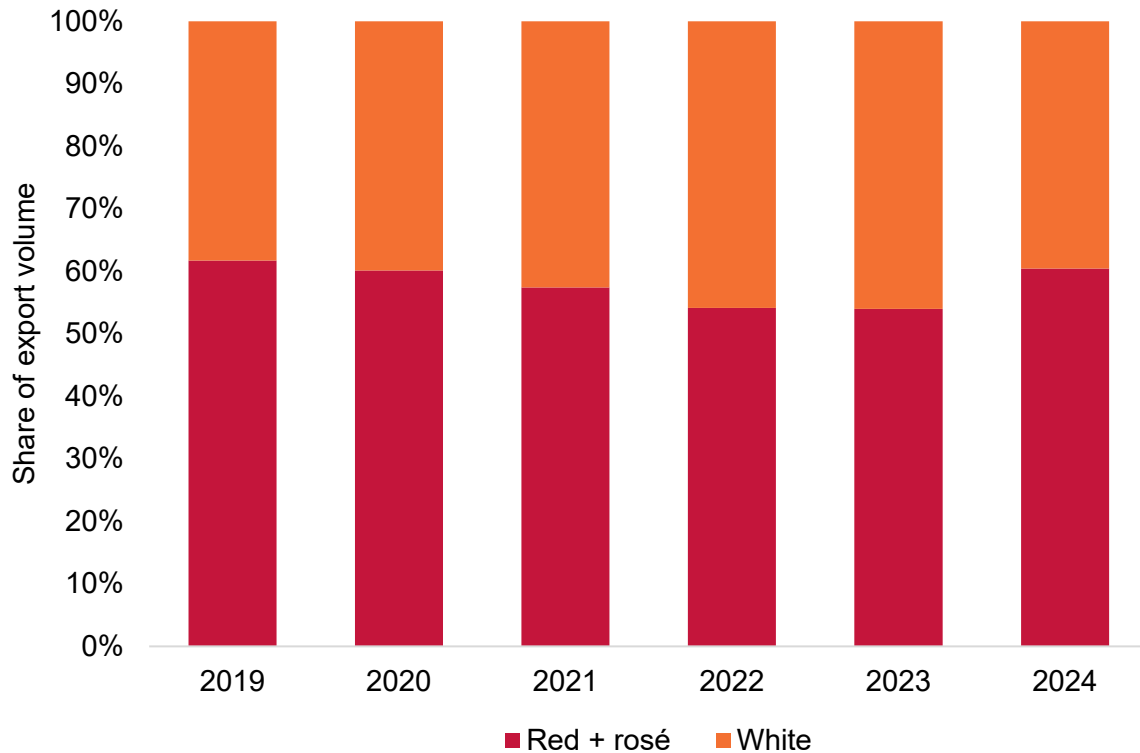
Wine style and varieties

The increase in exports to mainland China has impacted on red wine's share of exports as 93 per cent of exports to China are red wine.

In the 12 months ended December 2024 the volume share of red and rosé wine increased from 54 per cent to 60 per cent. Meanwhile, white wine lost share – moving from 46 per cent to 40 per cent of volume as Australia's top white wine destinations declined in exports (see Figure 3).

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Figure 3: Volume share of exports by colour



Red and rosé wine

In the 12 months to December 2024, still red wine exports increased in value by 52 per cent to \$1.90 billion in value and by 21 per cent in volume to 373 million litres. Mainland China was the primary driver of this growth. Sparkling and carbonated red wines grew in value by 17 per cent to \$3.9 million – driven by mainland China, the United Kingdom, Singapore, and the United States.

Still rosé wine exports increased by 3 per cent in value to \$31 million and 5 per cent in volume to 15 million litres. This increase was largely driven by exports to Canada and mainland China. Meanwhile, sparkling and carbonated rosé wines declined by 12 per cent in value to \$17 million, with many destinations declining including New Zealand, the UK, US, Singapore, Japan, and the Philippines. Growth in exports to Canada and mainland China offset some of this loss.

The top varieties of red and rosé exports were:

- Shiraz, up 25 per cent to 173 million litres,
- Cabernet Sauvignon, up 15 per cent to 100 million litres,
- Merlot, up 2 per cent to 40 million litres,
- Pinot Noir, up 14 per cent to 5.7 million litres, and
- Petit Verdot, up 49 per cent to 4.8 million litres.

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White wine

Exports of still white wine decreased by 1 per cent in value to \$539 million and 9 per cent in volume to 247 million litres. The decline in volume was driven by all the top five destinations declining – the UK, USA, Canada, Germany, and New Zealand. As white wine exports make up a significantly smaller proportion of exports to mainland China the growth in exports to this market did not offset this decline. Sparkling and carbonated white wine exports increased by 19 per cent in value to \$51 million and 18 per cent in volume to 9 million litres. There were several destinations in growth for white wine including New Zealand, Sweden, Thailand, mainland China, Canada, Japan, and Singapore.

The top varieties of white wine exports were:

- Chardonnay, down 8 per cent to 136 million litres,
- Pinot Gris/Grigio, down 13 per cent to 41 million litres,
- Sauvignon Blanc, down 5 per cent to 26 million litres,
- Colombard, down 27 per cent to 6.9 million litres, and
- Semillon, down 8 per cent to 6.0 million litres.

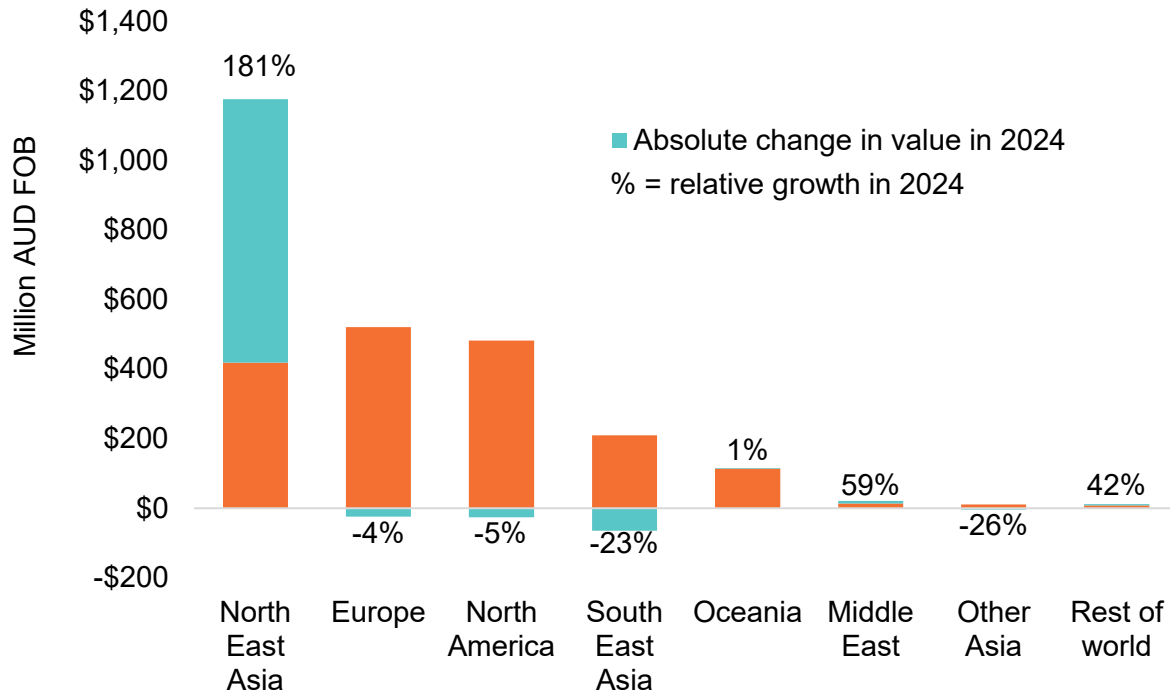
Destinations

In the year ended December 2024, Australian wine exporters shipped wine to 119 destinations, up from 112 in the previous year. As a result of the growth in exports to mainland China, the Northeast Asian region grew by 181 per cent in value to \$1.18 billion (a 46 per cent value share). Southeast Asia declined by 23 per cent in value to \$210 million, with almost all of these small, emerging markets declining year-on-year.

Europe and North America performed similarly during the year (see Figure 4), declining by 4 and 5 per cent respectively and each region representing around 20 per cent of export value. The decline in exports to North America was driven by the United States, with growth in exports to Canada offsetting some of the decline. There were mixed results by destination in Europe.

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Figure 4: Value of exports by destination region



The top five destinations by value were:

- Mainland China (up \$898 million to \$907 million)
- UK (down \$9 million to \$352 million)
- US (down \$38 million to \$325 million)
- Hong Kong (down \$125 million to \$171 million), and
- Canada (up \$13 million to \$156 million).

The top five destinations by volume were:

- UK (down 8 million litres to 212 million litres)
- US (down 28 million litres to 106 million litres)
- Mainland China (up 83 million litres to 84 million litres)
- Canada (down 7 million litres to 66 million litres), and
- New Zealand (down 2 million litres to 27 million litres).

Wine Australia's General Manager, Marketing, Paul Turale said, "this month's commentary broadly reflects that provided in last quarter's update.

Stubbornly high global stock levels coupled with broader economic uncertainty that continues to impact on discretionary income is reflected in the latest MAT export performance.

We do not believe that the apparent drop in exports to Southeast Asia reflects a material change in demand, rather some exporters choosing to prioritise a re-stocking of their supply chains throughout mainland China, given the rebound of wine exports to the market has exceeded general expectations.

Chinese trade and customers again embracing Australian wine is very welcome, but this must not diminish our resolve to build a diversified global export footprint to supplement our strong share position domestically."

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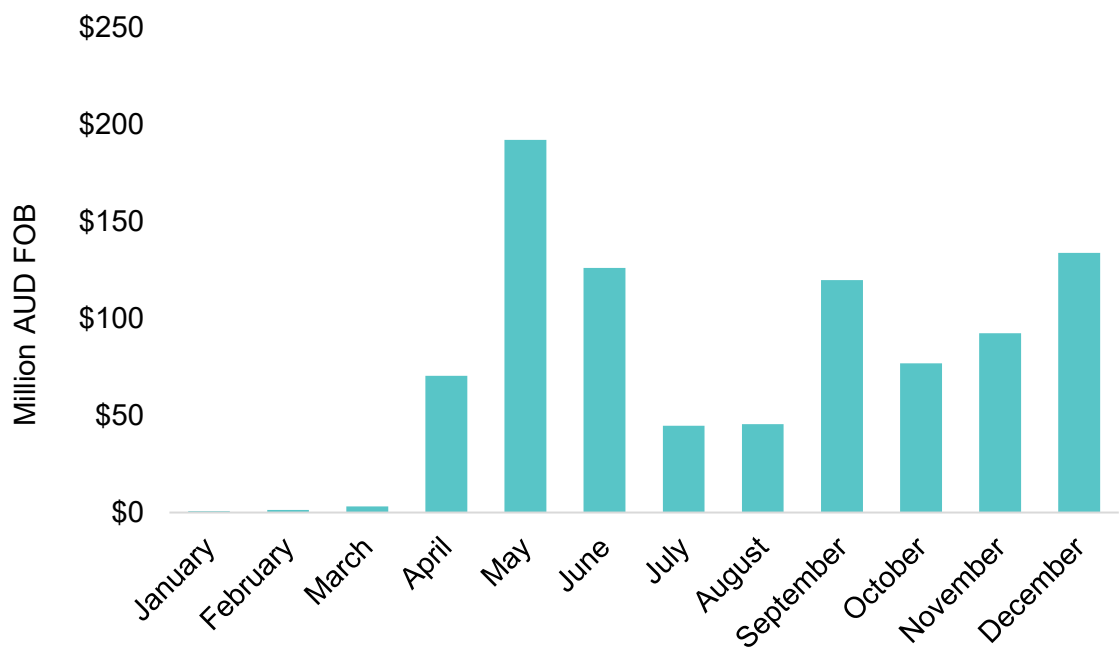
Asia

Mainland China

In the 12 months ended December 2024, Australian wine exports to mainland China increased by \$898 million to \$907 million in value and 83 million litres to 84 million litres in volume, after import tariffs on Australian bottled wine were removed on 29 March 2024.

As illustrated in Figure 5, while there has been month-to-month volatility in the value of shipments to mainland China since tariffs were removed, the performance is nonetheless very positive. However, Chinese wine consumption is much lower than it was before the import tariffs were imposed, so it will take more time before it becomes clear what the “new normal” level of exports to mainland China will be, after this initial re-stocking period.

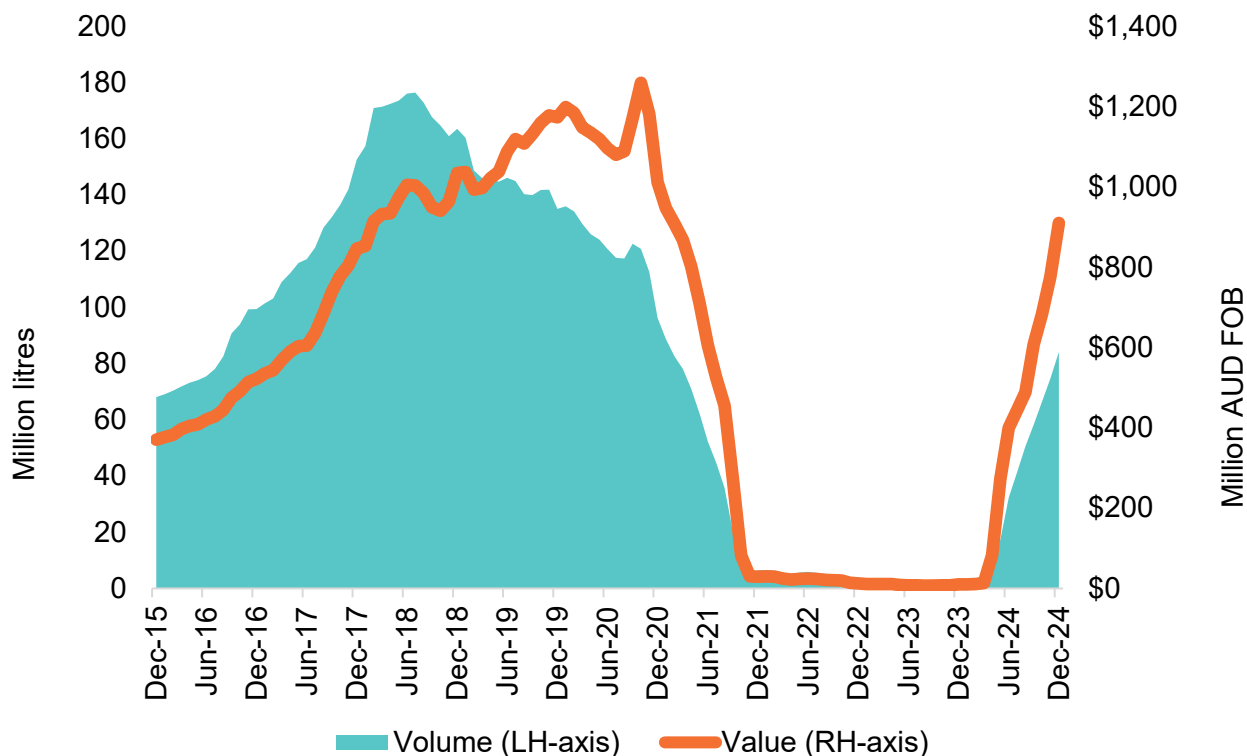
Figure 5: Value of shipments to mainland China in 2024



In the period between April and December 2024, export value has climbed to roughly the levels seen in early 2018 (see Figure 6). However, there was a much higher volume, and lower average value, of exports during 2018 than in 2024. The average value of exports to mainland China in the 12 months ended December 2024 was \$10.79 per litre FOB, about \$5 per litre higher than 2018, illustrating the premiumisation (declining volume and increasing value) of wine exports to the market that started in 2019.

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Figure 6: Australian wine exports to mainland China over time



Packaged exports to mainland China account for 93 per cent of the value shipped, but only 43 per cent of the volume. Meanwhile, unpackaged exports contributed 7 per cent of the value and 57 per cent of the volume.

In the 12 months ended December 2024, there was growth across all price segments but with different impacts by volume and value. More than half (54 per cent) of the volume growth in 2024 came from exports with an average value below \$2.50 per litre – which is mostly unpackaged wine (to be packaged in market). Meanwhile, 83 per cent of the growth in value came from exports valued at \$10 per litre and above.

Most exports to mainland China are red in colour – having a 93 per cent volume share in 2024 (78 million litres). However, white wine has grown in share since the tariffs were removed, growing to a 7 per cent volume share (compared to 4 per cent in 2018).

The most popular varieties in red wines shipped to mainland China in 2024 were:

- Shiraz, 55 per cent volume share of red wine
- Cabernet Sauvignon, 26 per cent volume share,
- Merlot, 5 per cent volume share,
- Grenache, 3 per cent volume share, and
- Petit Verdot, 2 per cent volume share.

The top exported white varieties were:

- Chardonnay, 72 per cent volume share of white wine,
- Riesling, 8 per cent volume share,
- Muscat Gordo Blanco, 5 per cent volume share,
- Sauvignon Blanc, 4 per cent volume share, and
- Colombard, 2 per cent volume share.

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Rest of Asia

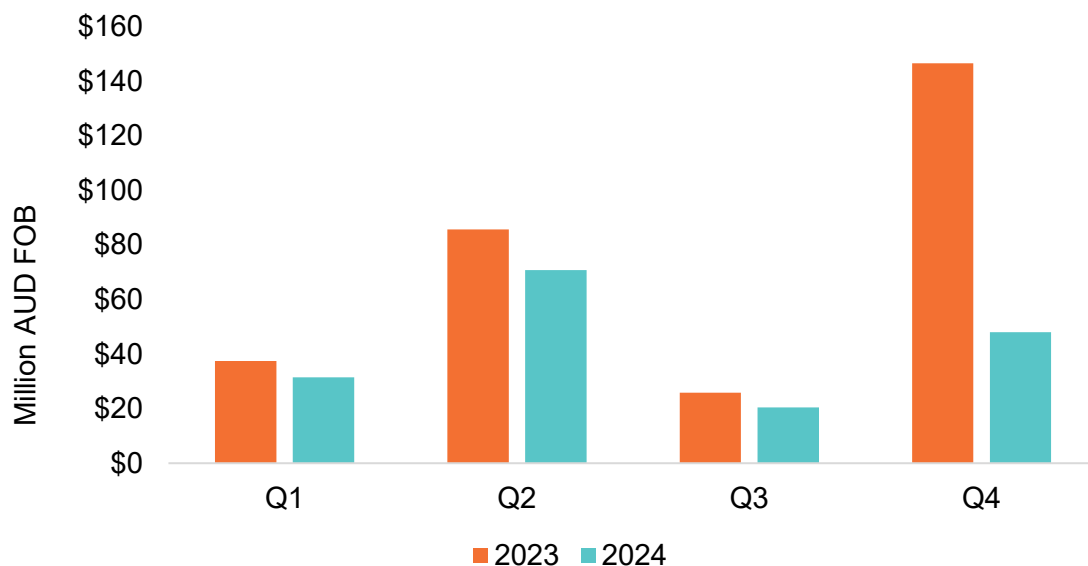
Outside of mainland China, most other Asian destinations declined in exports during the 12 months to December 2024 (see Figure 7), although the long-term growth rate in value for the region was still positive at 4 per cent per year in the last 5 years. The destinations with the biggest impact on value in the last 12 months were Hong Kong, Singapore, and Thailand.

Figure 7: Exports to Asia by destination market (excluding mainland China)

Destination market	Volume			Value		
	Million litres	Year-on-year % change	5-year CAGR	Million AUD	Year-on-year % change	5-year CAGR
Hong Kong	8.7	-8%	4%	\$170.9	-42%	10%
Singapore	5.9	-18%	-4%	\$100.2	-25%	-1%
Thailand	7.5	15%	12%	\$45.3	-22%	14%
Japan	11.3	-3%	-8%	\$45.0	-3%	-3%
Malaysia	2.7	2%	-1%	\$36.0	-23%	0%
South Korea	3.5	-1%	3%	\$27.7	-7%	7%
Taiwan	2.5	-10%	4%	\$24.1	-6%	6%
Philippines	2.7	4%	0%	\$13.8	-6%	1%
India	2.1	-21%	5%	\$8.2	-31%	4%
Vietnam	1.9	-19%	15%	\$6.6	-39%	-1%
Indonesia	0.6	-36%	-12%	\$6.5	-18%	-14%
Macao	0.0	-85%	-1%	\$1.3	-89%	30%
Sri Lanka	0.2	8%	5%	\$1.1	-12%	1%
Cambodia	0.2	-21%	-12%	\$1.1	-22%	-14%
Others	0.3	-11%	-6%	\$1.7	-28%	-7%
Total	50.2	-6%	0%	\$489.4	-30%	4%

Exports to Hong Kong declined after a period of elevated exports in the last quarter of 2023 (see Figure 8), likely driven by exporters anticipating the removal of import tariffs in mainland China in early 2024. This was a unique scenario that did not occur again in 2024, and therefore exports declined 42 per cent to \$171 million.

Figure 8: Export value to Hong Kong by quarter



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Like Hong Kong, Singapore is a key trading hub in the region and therefore export levels can be volatile in a rapidly shifting trading environment. In the 12 months to December 2024, the value of exports to Singapore declined by 25 per cent to \$100 million, while volume declined by 18 per cent to 5.9 million litres.

Thailand also declined in value, by 22 per cent to \$45 million, but did grow in volume, by 15 per cent to 7.5 million litres. Despite the decline in value, the long-term trend for the market is positive – growing 14 per cent on average over the last five years

Europe

United Kingdom

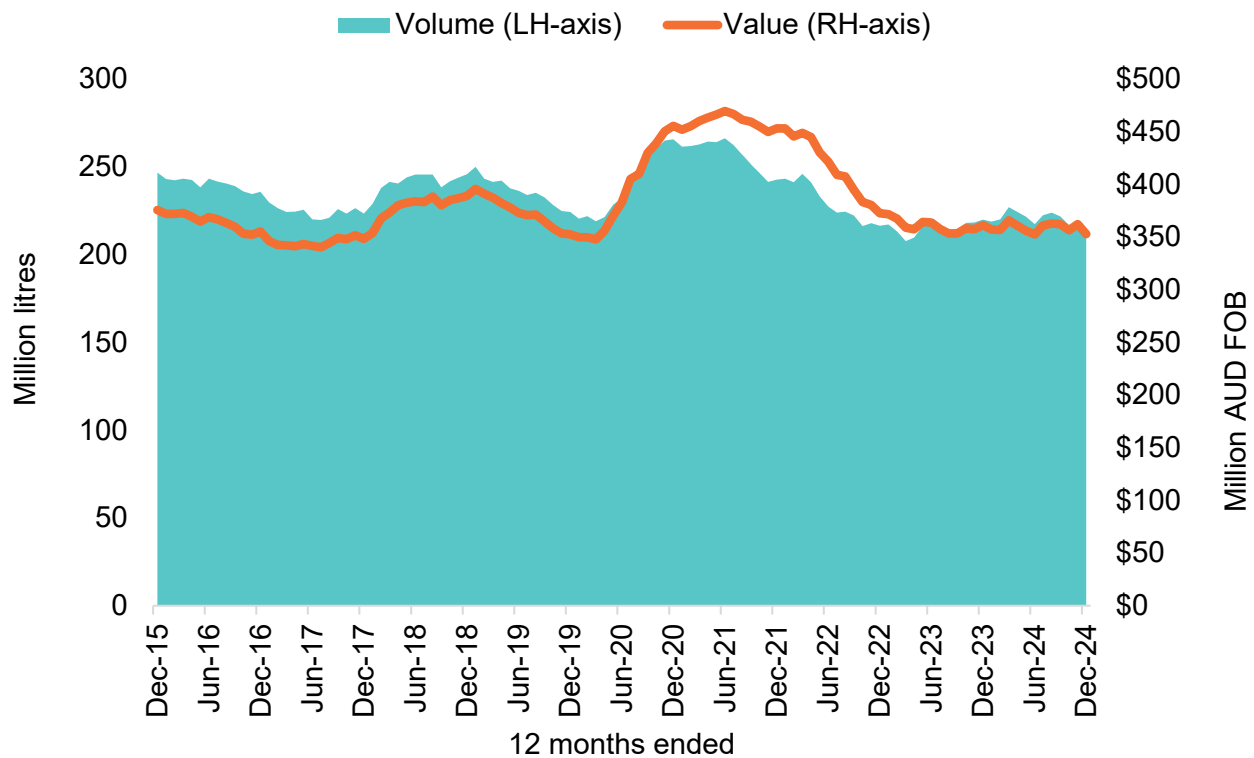
In the 12 months ended December 2024, Australian wine exports to the United Kingdom (UK) declined by 3 per cent in value to \$352 million and by 4 per cent in volume to 212 million litres. Average value increased slightly, by 1 per cent to \$1.66 per litre. The relatively lower average value shipped to the UK compared to other markets is due to 89 per cent of volume being shipped to the country unpackaged and then packaged in-market.

Australian wine exports to the UK have stabilised somewhat after a turbulent period post Brexit and the COVID-19 pandemic (see Figure 9). However, this does not mean the market is without headwinds going into 2025. While inflation has eased, consumers are still being cautious about their spending on alcohol, with nearly all categories declining across all channels³. On 1 February 2025, an increase to the alcohol duty is scheduled, along with the ending of the wine easement – meaning that over 30 different amounts of duty will be payable on wine, depending on the percentage of alcohol in the product. Producers selling their wine in the UK have started adjusting the alcohol level in their products during the last 12 months. According to off-premise data from Circana, there has been an increase in the volume share of wine sold below 11.5 per cent alcohol, while the market above 11.5 per cent has lost share. Similarly, there has been a shift in alcohol levels in Australian wine being exported to the UK with the volume share of products below 11.5 per cent alcohol increasing from a 28 per cent share to a 42 per cent share.

³ WSTA Market Report December 2024

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Figure 9: Australian wine exports to the UK over time



Exports of unpackaged wine to the UK declined by 3 per cent in value to \$231 million and 4 per cent in volume to 190 million litres in the 12 months to December 2024. The average value of unpackaged shipments increased slightly by 1 per cent to \$1.22 per litre. Packaged exports were relatively stable year-on-year, declining by 1 per cent in value to \$121 million, and by 0.1 per cent in volume to 22 million litres.

Driven by unpackaged wine, exports below \$5 per litre declined by 3 per cent in value and 4 per cent in volume. Exports with an average value of \$5 per litre and above declined by 2 per cent in value and 0.2 per cent in volume. Most of the decline in this part of the market came from exports above \$10 per litre, while the \$7.50 to \$9.99 price segment increased by 11 per cent in volume.

Red and rosé wine exports declined by 4 per cent in value to \$203 million and 4 per cent in volume to 118 million litres (a 56 per cent volume share), driven mostly by still red wine, although still rose also declined by 8 per cent in value.

The top varieties exported as part of red and rosé wines to the UK were:

- Shiraz, down 4 per cent to 60 million litres,
- Merlot, down 6 per cent to 18 million litres,
- Cabernet Sauvignon, down 12 per cent to 17 million litres,
- Malbec, down 11 per cent to 2.1 million litres, and
- Petit Verdot, up 1 per cent to 1.4 million litres.

White wine exports declined by 1 per cent in value to \$149 million and 2 per cent in volume to 94 million litres (a 44 per cent volume share). This decline was driven by still white wines, while sparkling and carbonated white wines offset some of the decline – growing by 24 per cent in value to \$1.9 million.

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The top varieties in white wines exported to the UK were:

- Chardonnay, down 5 per cent to 49 million litres,
- Pinot Gris/Grigio, up 17 per cent to 16 million litres,
- Sauvignon Blanc, down 10 per cent to 15 million litres,
- Semillon, down 1 per cent to 3.5 million litres, and
- Colombard, down 17 per cent to 2.6 million litres.

Rest of Europe

There were mixed results for other European destinations (see Figure 10). It is important to note that not all wine that lands in a market in Europe is consumed there. Due to the existence of packaging facilities in markets such as Belgium, Denmark and the Netherlands, there can be significant re-exporting of wines from one market to other European markets and this can impact on the results for individual markets year-on-year.

Exports to the region (excluding the UK) declined by 8 per cent in value to \$169 million in the 12 months to December 2024. The largest impact on value came from Germany and the Netherlands, which declined by 13 and 26 per cent respectively. The decline was driven mostly by unpackaged wine. Counteracting some of this loss was growth to Belgium – also unpackaged wine – and Sweden – driven by packaged wine below \$10 per litre.

Figure 10: Exports to Europe by destination market (excluding UK)

Destination market	Volume			Value		
	Million litres	year % change	5-year CAGR	Million AUD	year % change	5-year CAGR
Germany	24.3	-11%	-5%	\$27.6	-13%	-10%
Denmark	18.0	3%	4%	\$27.4	-9%	-1%
Sweden	6.4	7%	4%	\$21.6	4%	0%
Netherlands	6.0	-23%	-19%	\$19.2	-26%	-15%
Belgium	11.0	18%	3%	\$17.5	17%	1%
France	7.0	-19%	1%	\$11.8	-17%	-1%
Finland	5.0	4%	-1%	\$10.0	7%	-5%
Ireland	2.2	2%	-4%	\$9.3	8%	0%
Poland	2.1	94%	8%	\$5.1	42%	2%
Switzerland	2.0	138%	11%	\$4.8	10%	-2%
Norway	1.1	-34%	-9%	\$4.8	-24%	-3%
Latvia	0.6	24%	9%	\$3.8	50%	13%
Czech Republic	0.3	122%	-4%	\$1.1	94%	-9%
Others	0.9	-54%	-22%	\$4.9	-53%	-17%
Total	86.9	-3%	-3%	\$168.9	-8%	-5%

Wine Australia's Regional General Manager EMEA, Laura Jewell MW said, "In the UK the year ended with some strong but very late retail sales. The multiple grocers increased their promotional offers resulting in high sales in the final three weeks to Christmas. Premium own label wines were particularly successful, and all sparkling wines benefitted from deep discounts on Champagne and Prosecco.

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Looking ahead, inflation is still higher than the Bank of England target although inflation on wine has dropped from the high level at the beginning of the year. However, with the change to Excise Duty rates due in February, wine inflation will rise again as retailers pass those increases on to consumers. Other headwinds include changes to business rates, employer national insurance rates; both of which will impact the hospitality trade; and the introduction of extended producer responsibility on all packaging.

There are some highlights across Europe particularly in Ireland, Poland and Switzerland, although off a small base. Sweden is showing strong growth in price segments up to \$10 per litre, reflecting some successful tenders with the monopoly. We will be returning to Stockholm in late September for our trade and consumer events.”

North America

United States

Australian wine exports to the United States (US) declined by 10 per cent in value to \$325 million and 21 per cent in volume to 106 million litres in the 12 months ended December 2024. Average value increased by 13 per cent to \$3.06 per litre FOB.

The decline in exports was almost entirely driven by unpackaged wine after a surge in this category of exports in early 2023. Unpackaged exports declined by 36 per cent in value to \$55 million and 34 per cent in volume to 47 million litres (a 45 per cent volume share). Meanwhile, packaged exports declined by 3 per cent in value to \$270 million and 5 per cent in volume to 59 million litres (a 55 per cent volume share).

Exports with an average value below \$5 per litre declined by 21 per cent in volume, driven by the decline in unpackaged exports. Exports with an average value of \$5 per litre and above declined by 6 per cent in volume, with growth between \$5 and \$7.49 per litre outweighed by the decline at \$7.50 per litre and above.

Exports of red and rosé wine to the US declined by 4 per cent in value to \$165 million and 5 per cent in volume to 50 million litres. This decline was driven mainly by still red wine, while still rosé wine increased by 47 per cent in volume. Sparkling and carbonated red/rosé exports declined by 40 per cent in volume.

There were mixed results for the top varieties in red/rosé exports:

- Cabernet Sauvignon, down 5 per cent to 22 million litres,
- Shiraz, down 13 per cent to 11 million litres,
- Merlot, up 17 per cent to 7.7 million litres,
- Pinot Noir, up 13 per cent to 2.3 million litres, and
- Durif, up 35 per cent to 0.3 million litres.

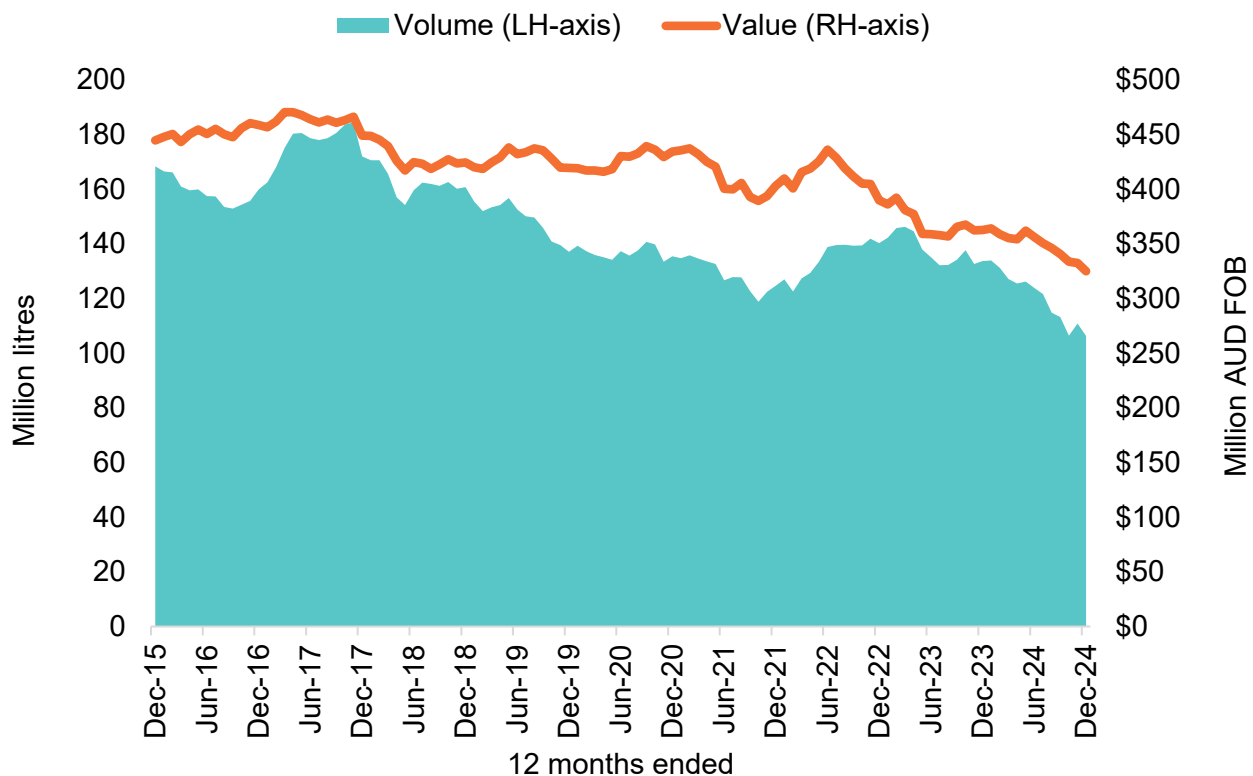
Exports of white wine to the US declined by 16 per cent in value to \$160 million and 31 per cent in volume to 56 million litres. This decline was almost entirely attributed to unpackaged still white wine exports. White sparkling and carbonated wine were more stable, declining by 1 per cent in value and 6 per cent in volume.

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The top varieties in white wines exported to the US were:

- Chardonnay, down 27 per cent to 34 million litres,
- Pinot Gris/Grigio, down 46 per cent to 9.8 million litres,
- Sauvignon Blanc, up 13 per cent to 3.2 million litres,
- Colombard, down 46 per cent to 1.3 million litres, and
- Shiraz⁴, down 36 per cent to 0.9 million litres.

Figure 11: Australian wine exports to the US over time



The decline in Australian wine exports to the US comes at a time when the US wine market is struggling to move past a surplus inventory that resulted from the COVID-19 pandemic and its aftermath. According to the US Census Bureau inventory levels remain elevated as consumption levels have not recovered. Total off-premise wine sales declined by 4 per cent in volume in the 12 months to December 2024⁵, and while on-premise sales are slightly more robust, price increases of 20 per cent on average⁶ and shrinking wine lists and number of outlets means this channel has its own challenges. Additionally, an increase in wine product approvals from the Alcohol and Tobacco Tax & Trade Bureau (TTB) highlights the increased competition in a market where more producers are seeking placement within gradually consolidating distributor and retail tiers. The number of US wineries has increased by around 2 per cent per year in the past five years, while the number of distributors has decreased at about the same rate⁷.

⁴ Although Shiraz is a red variety, this data point refers to Shiraz grapes that have been used in white wine products.

⁵ Circana

⁶ US Bureau of Labor Statistics

⁷ Wine Business Analytics

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Wine Australia's Regional General Manager Americas, Aaron Ridgway said, "2024 will go down as one of the toughest years for wine in the US in half a century. Large distributors reduced their sales teams, domestic winery acquisitions slowed, and retailers offered deep discounts in December to try and meet year-end numbers and move through supplier deals. Then, to kick off 2025, the US Surgeon General issued an advisory outlining a link between alcohol consumption and increased cancer risk.

The industry is more united than ever in pushing back on these claims, and messages of moderation, discerning product choices and "drinking better" dominate social media and wine PR newswires.

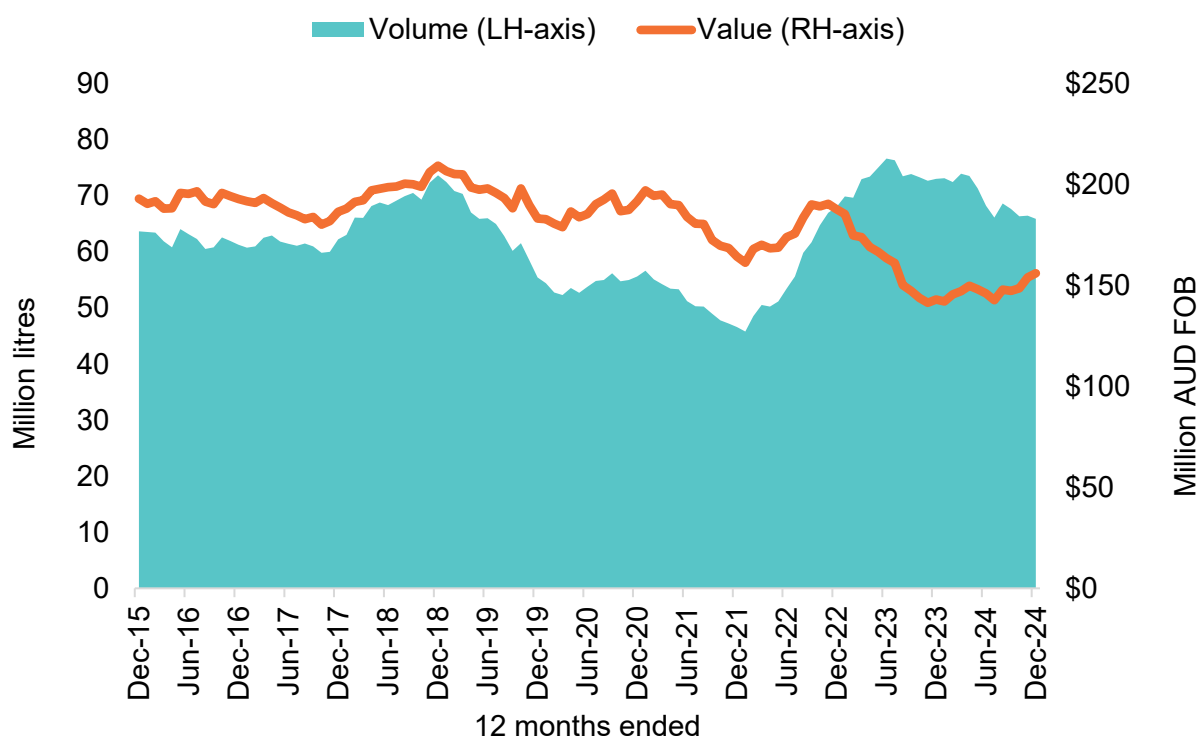
The weak Australian dollar and incredible quality of Australian wine continue to represent opportunity as stubborn inflation keeps interest high. Consumers are looking for quality *and* value and this may define the next year or longer, especially now with the election behind us."

Canada

Australian wine exports to Canada increased by 9 per cent in value to \$156 million but declined by 10 per cent in volume to 66 million litres, as a result average value increased by 21 per cent to \$2.37 per litre FOB.

The different results by value and volume (see Figure 12) are due to diverging trends by packaging type. Driving the increase in value was a recovery in the level of packaged exports after a decline at the end of 2023 and early 2024. Packaged exports increased by 19 per cent in value to \$119 million in the 12 months ended December 2024. Meanwhile, the decline in volume was driven by declining levels of unpackaged wine exports after a surge in this segment of exports in the previous 12 months. Unpackaged wine exports to Canada declined by 17 per cent in volume to 47 million litres in 2024.

Figure 12: Australian wine exports to Canada over time



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Exports below \$5 per litre declined by 14 per cent in volume, with the decline below \$2.50 per litre (mostly unpackaged wine) outweighing growth between \$2.50 to \$4.99 per litre. Shipments with an average value of \$5 per litre and above increased by 15 per cent in volume – driven mostly by the \$7.50 to \$9.99 per litre price segment. There were increased levels of both red and white wine above \$5 per litre in the last 12 months.

Red and rosé wine exports to Canada increased by 10 per cent in value to \$94 million and declined by 8 per cent in volume to 40 million litres. This was mainly driven by still red wine exports, which increased by 8 per cent in value, while still rosé exports increased by 30 per cent in value.

The top varieties in red and rosé wine exported to Canada in 2024 were:

- Cabernet Sauvignon, down 15 per cent to 14 million litres,
- Shiraz, down 9 per cent to 12 million litres,
- Merlot, down 42 per cent to 2.6 million litres,
- Muscat Gordo Blanco, up 29 per cent to 1 million litres, and
- Ruby Cabernet, up 20 per cent to 0.5 million litres.

White wine exports to Canada increased by 7 per cent in value to \$62 million and declined by 13 per cent in volume to 26 million litres. Still and carbonated white wine were the styles driving this trend.

The top varieties in white wines exported to Canada were:

- Pinot Gris/Grigio, down 0.2 per cent to 11 million litres,
- Chardonnay, down 22 per cent to 6.5 million litres,
- Muscat Gordo Blanco, up 1 per cent to 2.1 million litres,
- Sauvignon Blanc, up 53 per cent to 1.4 million litres, and
- Colombard, down 57 per cent to 0.7 million litres.

Other key destinations

New Zealand

Australian wine exports to New Zealand declined by 0.1 per cent in value to \$101 million and 6 per cent in volume to 27 million litres. Unpackaged wine was the main driver of the decline, while packaged wine increased by 3 per cent in value. Packaged exports above \$5 per litre increased by 18 per cent in volume, with red, rosé, and white premium wine shipments growing.

United Arab Emirates

Exports to United Arab Emirates increased by 44 per cent in value to \$18 million and 30 per cent in volume to 3 million litres. The growth in exports in the last 6 months of 2024 comes after a period of lower exports to the market since the advent of the COVID-19 pandemic. However, there is still a way to go to get back to the pre-pandemic level of exports. The recent growth is driven by still red wine exports above \$5 per litre, which have doubled in volume and value in the last 12 months.

For more detailed data, please visit the [Export Dashboard](#).

Wine Australia

About Wine Australia

Wine Australia empowers the success of the Australian wine sector through Research, Innovation and Adoption to enhance global competitiveness and meet the challenges of tomorrow, today; Market Development to increase the demand and premium paid for Australian wine; and Regulatory Services to safeguard Australian wine's integrity and uphold the sector's reputation.

Wine Australia is funded by the sector, for the sector, through grapegrower, winemaker and exporter levies and user-pays charges, with matching funds from the Australian Government for research and innovation. Established under the Wine Australia Act 2013, it is a Commonwealth Government statutory authority.

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