

**Wine
Australia**

Export Report

12 months to 31 March 2025

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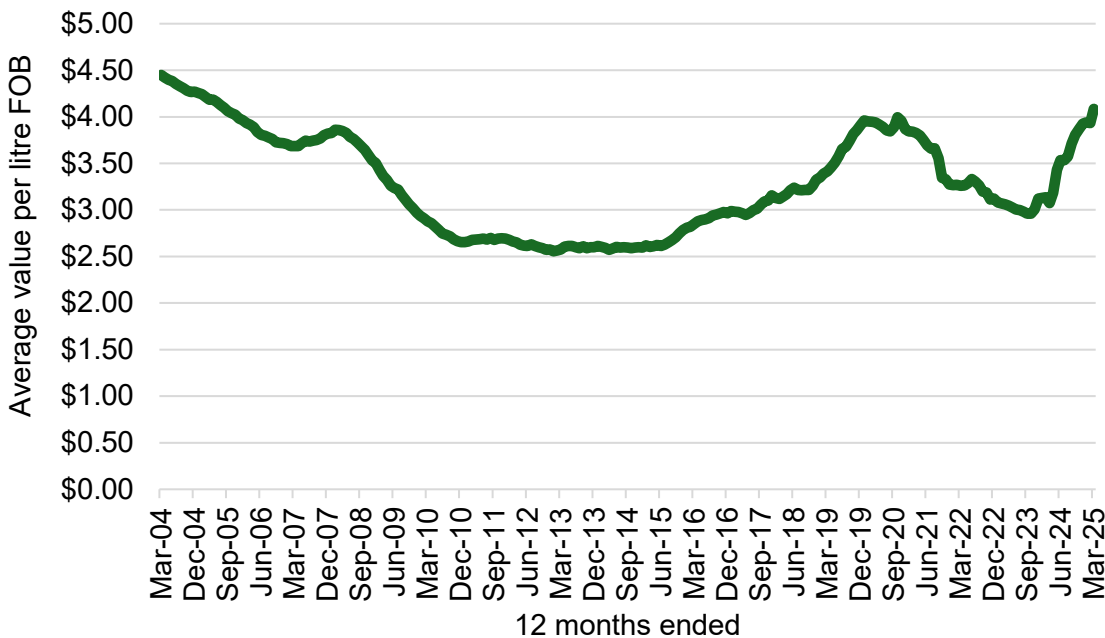
Executive Summary

- Australian wine exports increased by 41 per cent in value to \$2.64 billion and 6 per cent in volume to 647 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.
- This period represented a full year's worth of exports to mainland China since the tariffs were eliminated – resulting in 96 million litres of exports to the market, worth \$1.03 billion in value.
- Mainland China now represents 39 per cent of total export value, but 15 per cent of volume.
- Exports to the rest of the world declined by 13 per cent in value to \$1.62 billion and 9 per cent in volume to 551 million litres.
- While the decline in value to the world excluding China was mainly driven by Hong Kong, the volume drop was due to declines in exports to key destinations such as the United Kingdom, United States, and Canada.
- Unpackaged shipments drove the decline to the UK, offsetting increased packaged shipments.
- Shipments to the US continued their decline, with recent political and economic turmoil adding to the market uncertainty in the near-term.
- Shipments with an average value of \$5 per litre and above were the main driver of increased export value to Canada.

Overview

In the 12 months ended March 2025, Australian wine exports increased by 41 per cent in value to \$2.64 billion¹, the highest value since the 12 months ended May 2021. Volume also increased, by 6 per cent to 647 million litres. The average value of exports increased by 33 per cent to \$4.09 per litre free on board (FOB)², the highest average value in almost two decades (see Figure 1).

Figure 1: Average value per litre of Australian wine exports



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

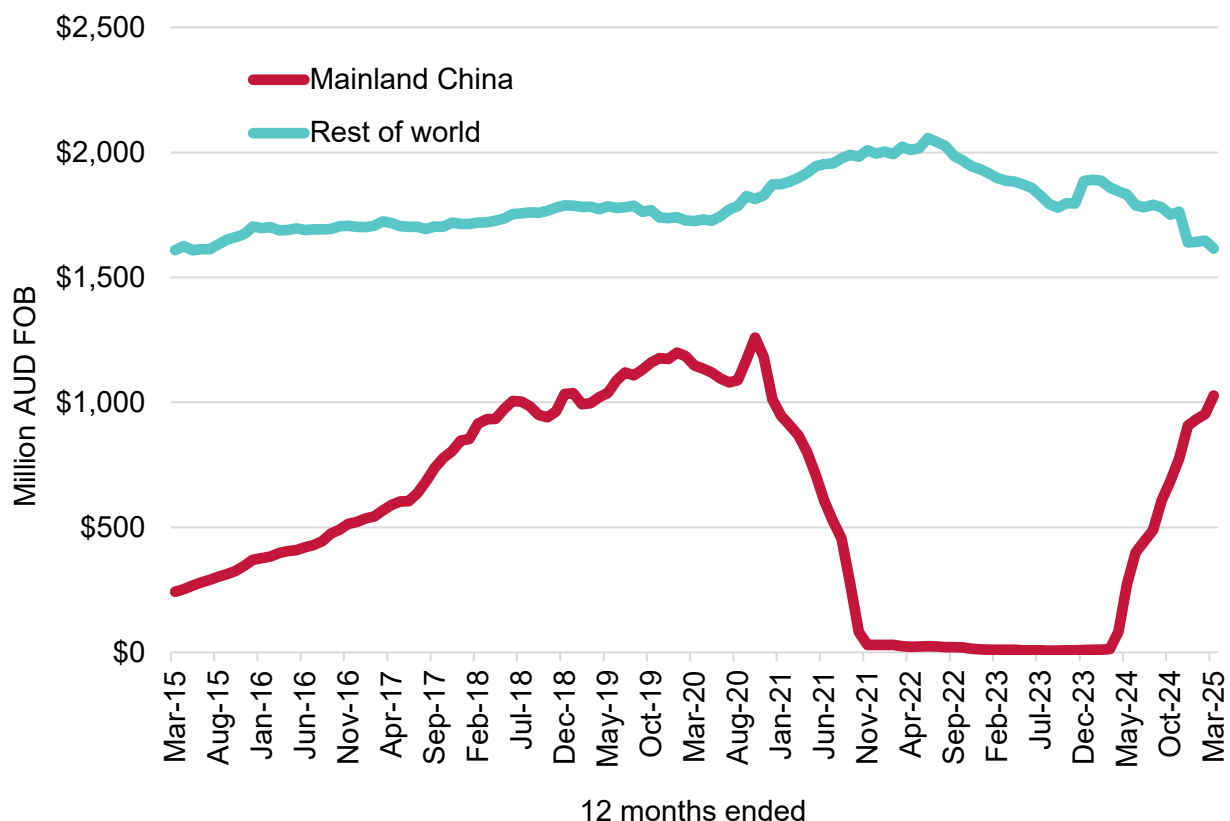
² All export wine values are the 'Free on board' (FOB) value of the wine, where the point of valuation is where goods are placed on board the international carrier, at the border of the exporting country. The FOB value includes production and other costs up until placement on the international carrier but excludes international insurance and transport costs.

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The increase in average value is mainly due to the elevated level of premium wine shipments to mainland China, after tariffs on Australian bottled wine were removed at the end of March 2024. The 12 months ended March 2025 represented a full year's worth of exports to mainland China since the tariffs were eliminated – resulting in 96 million litres of exports to the market, valued at \$1.03 billion. Mainland China now represents 39 per cent of total export value, but 15 per cent of volume.

Exports to the rest of the world (excluding mainland China) declined by 13 per cent in value to \$1.62 billion and 9 per cent in volume to 551 million litres. This was the lowest value to the rest of the world in ten years (see Figure 2) and lowest volume in over twenty years. While the decline in value was mainly driven by Hong Kong, the volume drop was due to declines in exports to key destinations such as the United Kingdom, United States, and Canada.

Figure 2: Australian wine export value, mainland China vs rest of world



Outside of the unique circumstances relating to Australian wine exports to mainland China, the global wine market is facing considerable headwinds which are impacting on results to other markets and are unlikely to be resolved in the near-term. While there has been a long-term trend of consumers drinking less alcohol due to health and wellness concerns, more recent cost-of-living pressures could continue, or potentially get worse in certain markets, given current economic and geopolitical volatility. Escalating trade wars have the potential to increase prices, complicate supply chains, and rapidly change the competitive landscape in key wine markets in the near-term.

Container type

Exports of packaged Australian wine increased by 53 per cent in value to \$2.15 billion in value and 17 per cent in volume to 221 million litres. This resulted in a 31 per cent increase in the average value of packaged exports, to \$9.73 per litre FOB, a record value. The increase in packaged exports was mainly driven by shipments to mainland China, but packaged shipments to Canada and the United Kingdom also increased in value.

Exports of unpackaged Australian wine (to be packaged in market) increased by 5 per cent in value to \$495 million and 1 per cent in volume to 426 million litres. The average value of unpackaged exports

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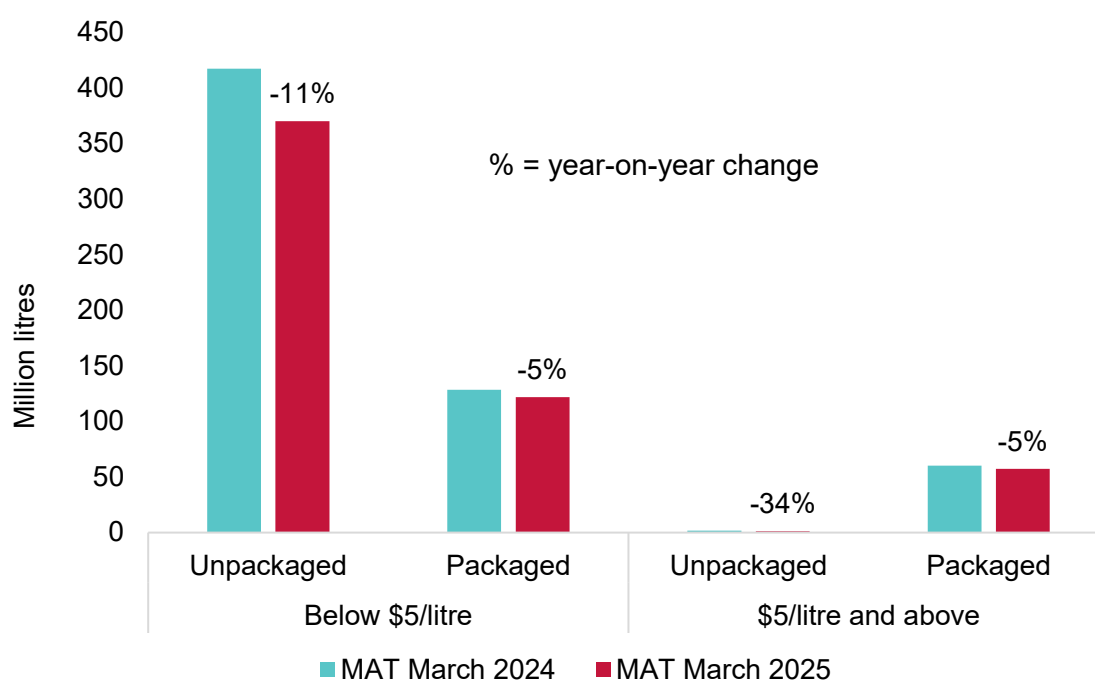
increased by 4 per cent to \$1.16 per litre FOB. Again, the main driver of this increase was mainland China, just offsetting declines to the United Kingdom, the United States, and Canada.

Price points

Exports with an average value below \$5 per litre increased by 2 per cent in volume to 558 million litres (an 86 per cent share of total volume) and exports with an average value of \$5 per litre and above increased by 44 per cent in volume to 89 million litres (a 14 per cent volume share). The growth in both price segments was driven by exports to mainland China.

Excluding mainland China, exports with an average value below \$5 per litre declined by 10 per cent in volume, while exports with an average value of \$5 per litre and above declined by 6 per cent. The decline below \$5 per litre was largely due to unpackaged exports (see Figure 3).

Figure 3: Volume by price segment and packaging type (excluding mainland China)



Wine style

Exports of Australian red wine grew by 18 per cent in volume to 371 million litres (a 57 per cent volume share) and 62 per cent in value to \$2.0 billion. The average value of red wine increased by 38 per cent to \$5.40 per litre FOB. This increase in red wine exports was driven by mainland China as 93 per cent of exports to this market are still red wine.

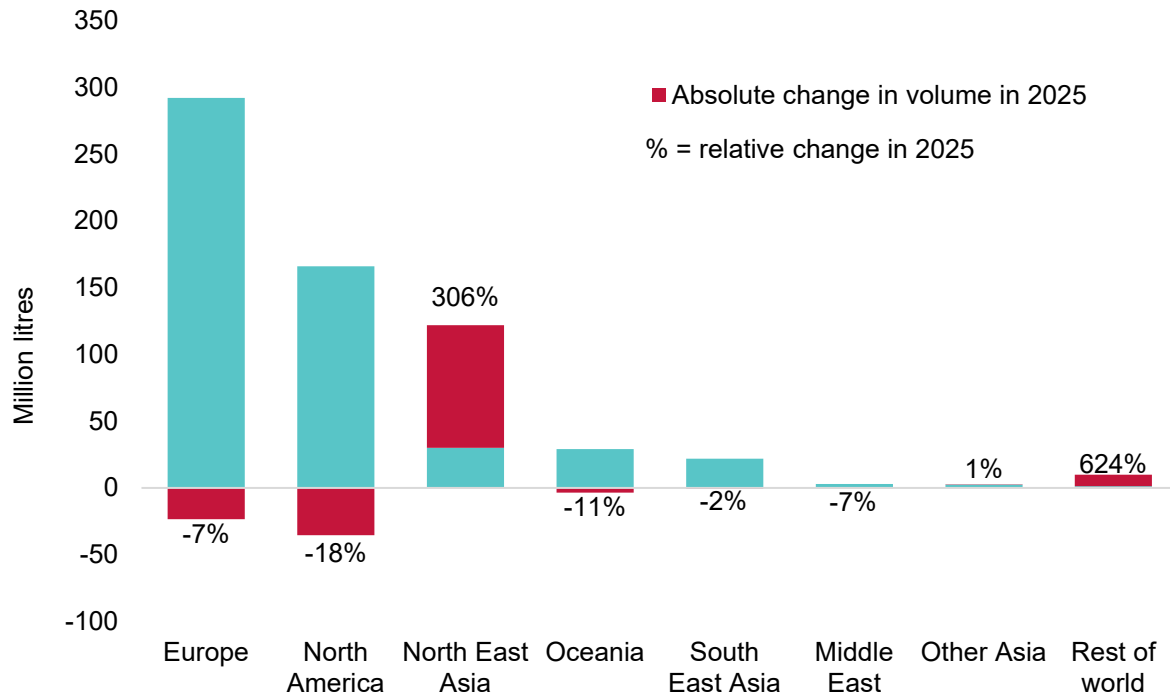
White wine exports declined by 7 per cent to 259 million litres (a 40 per cent volume share) and increased by 1 per cent in value to \$596 million. The average value of white wine exports increased by 8 per cent to \$2.30 per litre FOB. The loss in volume was driven by the top five markets for Australian white wine declining – United Kingdom, United States, Canada, Germany, and New Zealand. Although exports of white wine to mainland China also increased, this was unable to offset the decline to the major white wine markets.

Destinations

Australian wine was exported to 120 destinations in the year ended March 2025, up from 114 in the previous 12 months.

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Figure 4: Australian wine exports by region (Million litres)



The largest region by volume for Australian wine exports was Europe, receiving 292 million litres of wine worth \$515 million in the 12 months ended March 2025. Exports to Europe declined by 7 per cent in volume, mainly driven by a decline in exports to the United Kingdom.

Exports to North America declined by 18 per cent in volume to 166 million litres, valued at \$476 million. While shipments to the United States and Canada both declined in volume, Canada increased in value due to an increase in premium packaged shipments.

Shipments to Northeast Asia increased by 92 million litres (306 per cent) to 122 million litres. Value increased by \$870 million to \$1.28 billion. This increase was driven by exports to mainland China, although some of the growth was offset by a decline in exports to Hong Kong.

The top five destinations by value were:

- Mainland China (up \$1.01 billion to \$1.03 billion)
- UK (down \$12 million to \$353 million)
- US (down \$32 million to \$323 million)
- Hong Kong (down \$136 million to \$154 million), and
- Canada (up \$3.8 million to \$151 million).

The top five destinations by volume were:

- UK (down 19 million litres to 208 million litres)
- US (down 21 million litres to 106 million litres)
- Mainland China (up 94 million litres to 96 million litres)
- Canada (down 14 million litres to 60 million litres), and
- New Zealand (down 3.5 million litres to 26 million litres).

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Wine Australia’s General Manager, Marketing, Paul Turale said, “VUCA is an acronym that stands for Volatility, Uncertainty, Complexity and Ambiguity. All apt descriptors of the world currently and a drag on markets globally.

Despite a very positive headline export result driven by an exceptional full year’s trading back with China, stubbornly high global stock levels coupled with increasing economic uncertainty continues to negatively impact trade and consumer sentiment and is evident with continued softening of exports to other established and emerging markets around the world.

As we all try to navigate and adapt to the unknown, risk mitigation is paramount. In the world of wine that means a strategy based on delivering market diversification, playing to our relative strengths, and capitalising on opportunities as they present.

Despite the uncertainty around tariffs on goods imported into the United States and the anticipated flow on effects to other markets, currency is working in Australia’s favour for wine exporters, so we continue to look for positives and opportunities in these VUCA times.”

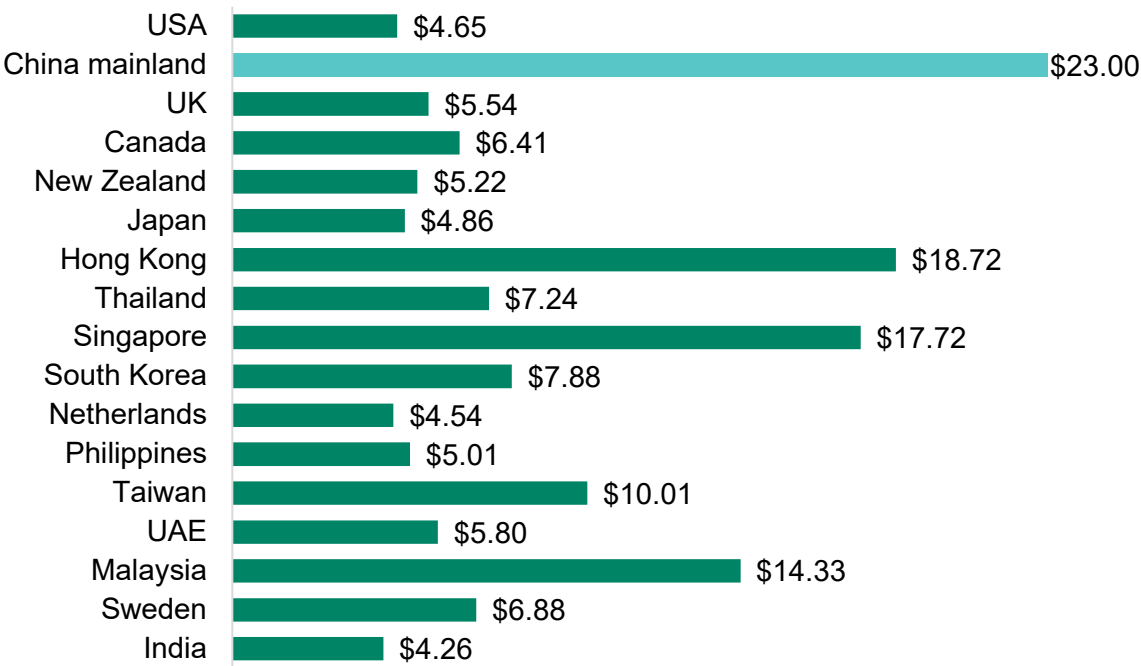
Asia

Mainland China

In the 12 months ended March 2025, Australian wine exports to mainland China increased by 94 million litres in volume to 96 million litres and \$1.01 billion in value to \$1.03 billion. The average value of shipments to mainland China was \$10.65 per litre FOB, the highest average value in the top 10 markets by volume.

This average value is a result of a comparatively high level of premium wine shipments into the market. The average value of packaged wine shipped to mainland China in the year ended March 2025 was \$23.00 per litre, much higher than any other major export market (see Figure 5). There were 41 million litres of packaged exports (mostly in glass bottle) shipped to China during the last 12 months, worth \$955 million. This represents a 43 per cent share of volume and a 93 per cent share of value to the market. Meanwhile, 55 million litres of unpackaged exports were shipped (a 57 per cent volume share), worth \$73 million (7 per cent of total value).

Figure 5: Average value per litre of packaged shipments
(markets listed in order of volume)

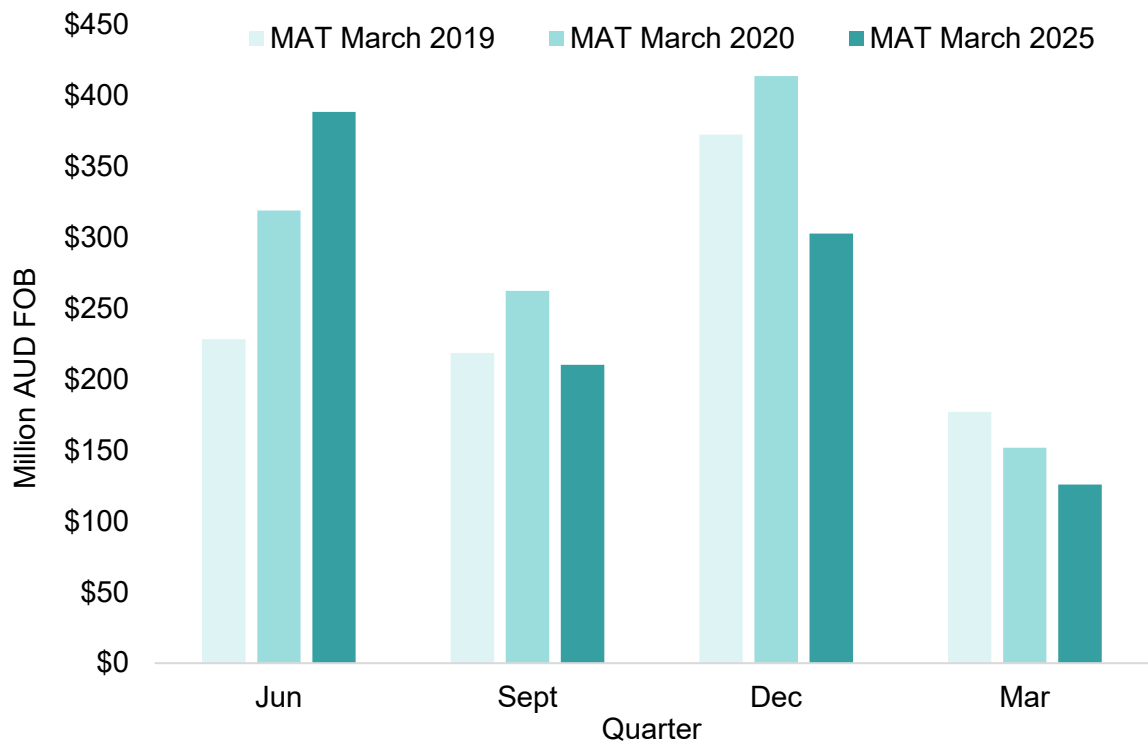


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Still red wine exports contributed 93 per cent of the volume shipped to mainland China in the 12 months ended March 2025. Still white wine had a 6 per cent volume share, while sparkling and fortified wines made up the remainder.

The value of exports to mainland China has reached the highest level since November 2020 – the month that tariffs on Australian bottled wine came into force. Comparing the last 12 months of exports to the two previous March MATs before tariffs were imposed, reveals that the 12 months ended March 2025 was much more heavily weighted to the start of the year, in order to re-stock Australian wine in the market. The three subsequent quarters were lower in value compared to the periods before tariffs.

Figure 6: Value of exports to mainland China by quarter

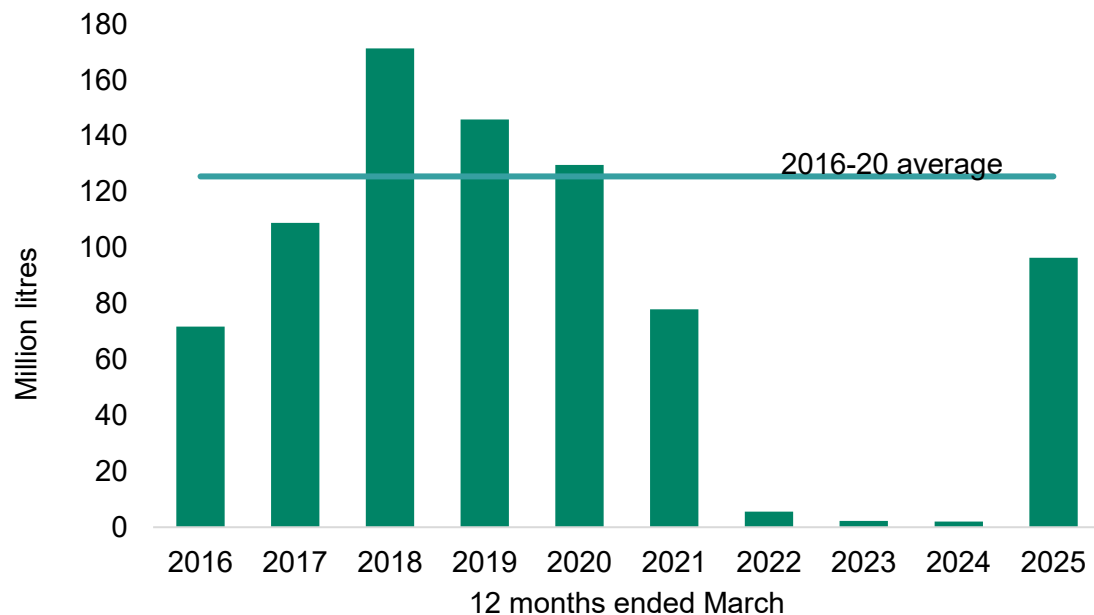


While total value of the three years was roughly similar – the biggest difference was the total volume shipped. The 12 months ended March 2025 is 23 per cent smaller in volume than the 5-year average between 2016 and 2020 (see Figure 7), and 44 per cent below the peak in 2018. The lower volume reflects that the total wine market in China has declined by 68 per cent over the last five years, from 146 million 9-litre cases in 2018 47 million in 2023³.

³ IWSR

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Figure 7: Volume of exports to mainland China



Rest of Asia

Exports to destinations in Asia excluding mainland China declined by 6 per cent in volume to 50 million litres and 27 per cent in value to \$485 million. The loss in volume was driven by Hong Kong, Singapore, and Japan, while value was heavily impacted by a decline in shipments to Hong Kong.

Figure 8: Exports to Asia (exc. Mainland China) by destination market

Destination market	Volume			Value		
	Million litres	% change	5-year CAGR	Million AUD	% change	5-year CAGR
Hong Kong	8.3	-14%	4%	\$153.7	-47%	10%
Singapore	5.9	-15%	-4%	\$104.6	-12%	0%
Japan	10.8	-12%	-7%	\$44.8	-6%	-2%
Malaysia	2.6	-6%	-3%	\$36.7	-22%	-1%
South Korea	3.8	9%	4%	\$27.6	0%	6%
Taiwan	2.7	6%	4%	\$27.0	14%	7%
Thailand	7.7	12%	16%	\$47.7	-14%	17%
Indonesia	0.5	-30%	-13%	\$6.4	-14%	-14%
Philippines	2.8	20%	1%	\$14.2	7%	1%
India	2.1	-2%	4%	\$9.0	-14%	4%
Vietnam	1.9	-16%	15%	\$8.0	-17%	3%
Cambodia	0.3	2%	-7%	\$1.4	6%	-9%
Sri Lanka	0.3	21%	8%	\$1.3	8%	3%
Macao	0.0	-89%	-10%	\$0.6	-94%	8%
Others	0.3	-7%	-5%	\$1.6	-33%	-5%
Total	50.0	-6%	0%	\$484.5	-27%	4%

Exports to Hong Kong declined after a period of elevated exports in the last quarter of 2023, potentially 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 47 per cent to \$154 million. Although exports declined in the last 12 months, Australian wine exports to Asia remain on a long-term growth trajectory – growing by an average of 4 per cent per year in the last five years.⁴

⁴ Compounded Annual Growth Rate (CAGR) is the annualised average rate of growth between a given number of years.

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Europe

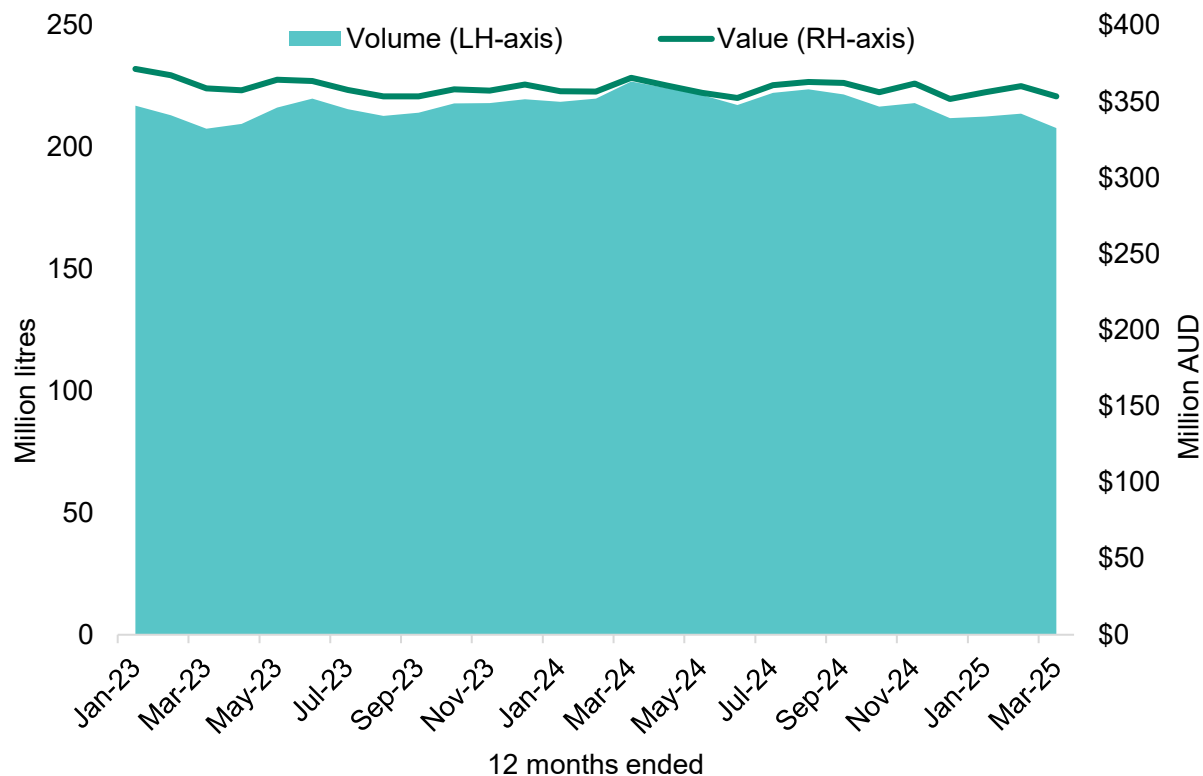
United Kingdom

In the 12 months ended March 2025, Australian wine exports to the United Kingdom (UK) declined by 8 per cent in volume to 208 million litres and 3 per cent in value to \$353 million. Average value increased by 6 per cent to \$1.70 per litre FOB.

The UK is Australia's largest export market by volume, owing to Australia's strong position in the UK off-trade market and the presence of large bottling facilities packaging wine, which in some cases then gets re-exported to other European markets. Although inflation has eased, consumers in the UK are still cautious with their spending on discretionary goods and most alcohol categories are suffering as a result. Wine sales dropped by 4 per cent in volume in the UK off-trade in the 12 months ended December 2024. Meanwhile, the average price of wine increased by 4 per cent to £6.79 per bottle⁵.

Ninety per cent of Australian exports to the United Kingdom are unpackaged, to be packaged in market. Unpackaged exports were the driver of the decline in the last 12 months, declining by 9 per cent in volume and 6 per cent in value. The average value of unpackaged exports increased by 4 per cent to \$1.25 per litre. Packaged exports increased by 2 per cent in both volume and value and average value was stable at \$5.54 per litre. The increase in average value of unpackaged exports – and relative stability of packaged exports – meant that the impact on value was less than volume in the last 12 months (see Figure 9).

Figure 9: Value and volume of exports to the United Kingdom



Exports of Australian red wine to the UK declined by 10 per cent in volume to 109 million litres, falling from a 53 per cent share of export volume to 52 per cent. White wine exports also declined, by 7 per cent to 93 million litres. However, white wine gained 1 percentage point in share to reach 45 per cent of volume.

⁵ Circana

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Shipments with an average value of below \$5 per litre declined by 9 per cent in volume to 200 million litres, driven by unpackaged wine. Exports with an average value of \$5 and above declined by 4 per cent in volume to 8 million litres.

The number of exporters shipping to the UK increased to 314 businesses, up by 23 from the previous 12 months. Of the top 20 exporters by value, 15 experienced a growth in export value in the past year.

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.

Australian wine exports to Europe (excluding the UK) declined by 5 per cent in volume to 84 million litres and 10 per cent in value to \$162 million. The largest driver of the decline was exports to the Netherlands, which declined by 30 per cent in volume and 36 per cent in value. Denmark and Sweden both grew in volume during the last 12 months, while Poland saw strong growth in both volume and value, across both unpackaged and packaged shipments.

Figure 10: Exports to Europe (exc. United Kingdom) by destination market

Destination market	Volume			Value		
	Million litres	% change	5-year CAGR	Million AUD	% change	5-year CAGR
Germany	24.5	-7%	-4%	\$27.5	-6%	-10%
Denmark	18.0	8%	0%	\$27.4	-4%	-4%
Sweden	6.4	1%	3%	\$21.4	-2%	-2%
Netherlands	5.3	-30%	-20%	\$17.0	-36%	-16%
Belgium	9.8	-9%	1%	\$16.6	0%	-1%
France	7.2	-9%	0%	\$12.0	-12%	-2%
Finland	4.5	-14%	-2%	\$9.1	-10%	-6%
Ireland	2.1	-11%	-7%	\$8.6	-8%	-2%
Poland	2.3	115%	11%	\$5.1	45%	3%
Norway	1.0	-33%	-11%	\$4.4	-32%	-7%
Switzerland	1.9	105%	13%	\$3.8	-23%	-1%
Latvia	0.6	32%	6%	\$3.7	39%	10%
Czech Republic	0.2	-18%	-10%	\$0.8	-22%	-13%
Spain	0.2	-64%	-20%	\$0.7	-75%	-15%
Others	0.5	-15%	-26%	\$3.8	13%	-20%
Total	84.5	-5%	-4%	\$161.7	-10%	-7%

Wine Australia's Regional General Manager EMEA, Laura Jewell MW said, "It has been a particularly turbulent start to 2025 in the UK, with the imposition of new excise duty rates, increased National Insurance contributions from employers and the upcoming Extended Producer Responsibility on packaging coming into force. It is difficult to find much optimism in the market when you add in the fact that consumers remained cautious with their spending. This was evident in lower footfall and reduced spending in bars and restaurants as well as declining alcohol sales (by volumes) in retail, as households carefully managed their budgets and discretionary purchases. The mood in the independents is less optimistic than previously when looking for sales growth in the coming 12 months, and that's before any impact from the fallout from the political situation with the EU and USA. Australian wine maintains its market share in the major retailers and 4 out of the top 10 brands are Australian."

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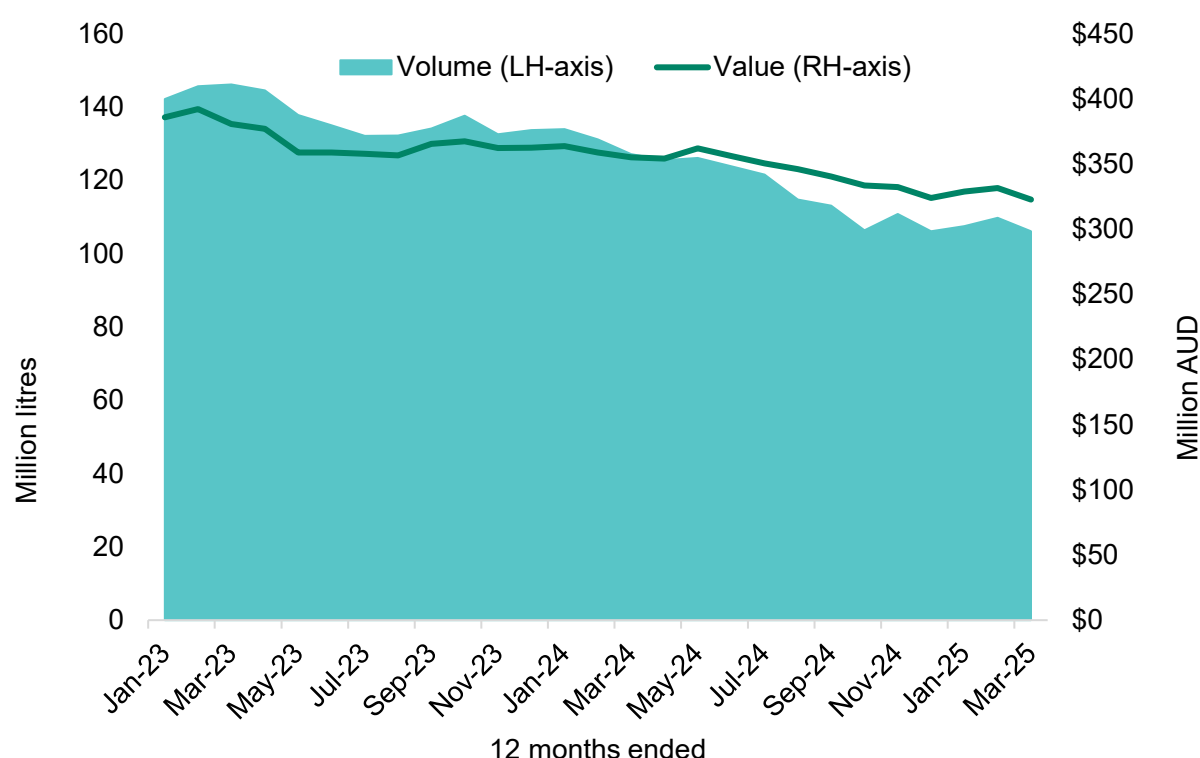
North America

United States

In the 12 months ended March 2025, Australian wine exports to the United States (US) declined by 17 per cent in volume to 106 million litres and 9 per cent in value to \$323 million, making it Australia's second largest market by volume and third largest market by value.

On 2 April 2025, US President Trump announced tariffs on all importing countries, including Australia. Australian wine is now (at the time of writing) subject to a 10 per cent tariff on arrival in the US, while wines from the European Union are also subject to a 10 per cent tariff after Trump announced a 90 day pause on the initially higher tariffs on the EU. Because there are a number of factors to account for – how much of the increased cost importers will pass on to consumers, the effect of a global trade war on foreign exchange rates, and whether consumers will start to switch to domestic wines – it is hard to predict how this will affect Australian wine exports to the US in the short-to-medium term.

Figure 11: Value and volume of exports to the United States



Exports to the United States have been on a long-term decline, with Australian exports now at the lowest level since the early 2000's (see Figure 11). Although the number of exporters had been on an upward trend between 2012 and 2023, in the last two years the number of exporters to the US has declined from 297 to 216. Tariffs, declining consumer confidence, and political turmoil are causing significant uncertainty and are unlikely to aid in turning these numbers around in the short-term.

In the last 12 months, most of the volume decline was driven by unpackaged wine exports. Unpackaged exports declined by 25 per cent in volume to 49 million litres (46 per cent of volume). Packaged exports also declined – by 7 per cent to 57 million litres (54 per cent of volume). However, packaged exports also contribute 82 per cent of the value of exports to the US. The value of packaged exports also declined – by 5 per cent to \$265 million.

Shipments with an average value below \$5 per litre declined by 17 per cent in volume, driven by the decline in unpackaged wines. Exports with an average value of \$5 per litre and above also declined, by 10 per cent in volume.

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White wine is the largest category of exports to the US – accounting for 58 per cent of the total volume. This category declined by 18 per cent in volume to 61 million litres. Red wine also declined, by 15 per cent to 44 million litres (a 41 per cent volume share).

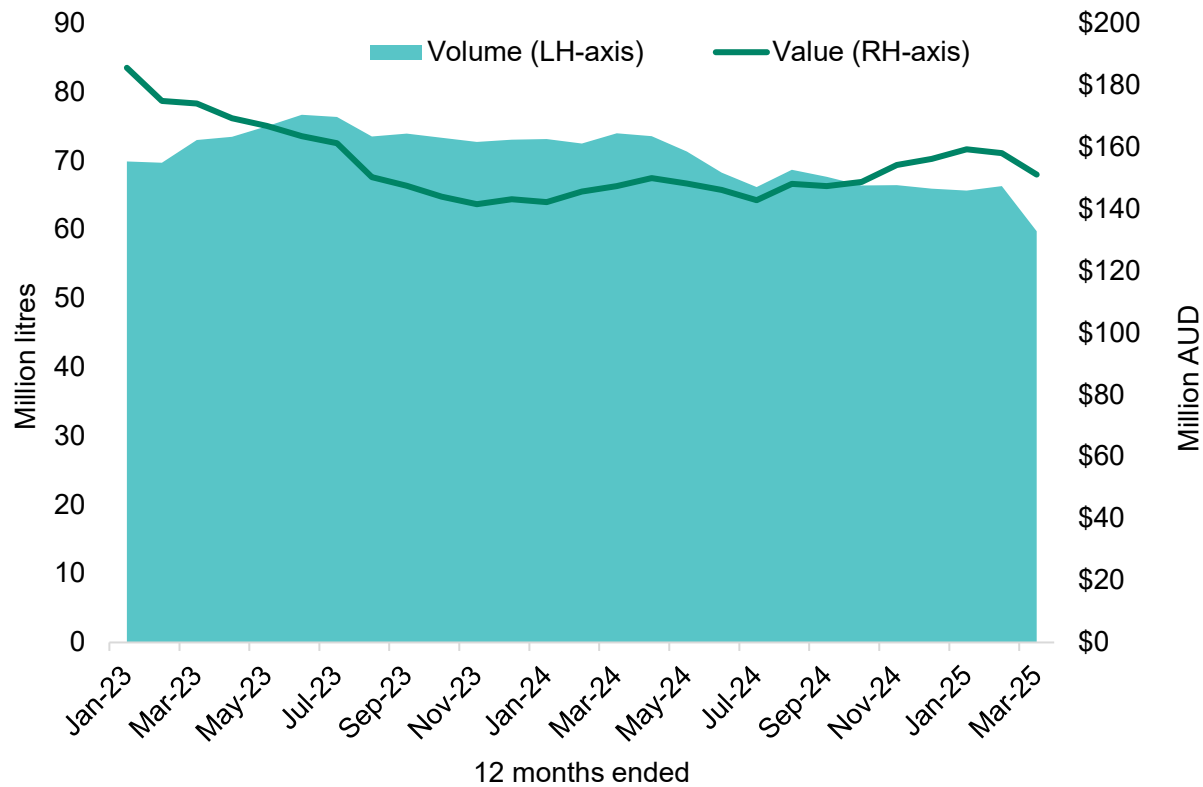
According to data from US distributors, compiled by SipSource, total sales of wine in the US declined by 7 per cent in volume in the 12 months to December 2024. Australian wines declined at a slightly lower rate of 3 per cent. The slightly more positive performance of Australian wine was attributed to white wines from Australia – which grew by 3 per cent. This was largely driven by Chardonnay, but Pinot Gris/Grigio and Sauvignon Blanc also grew in on-premise outlets.

Wine Australia’s Regional General Manager Americas, Aaron Ridgway said, “The US has not shed its status as the most attractive wine market in the world, but it has recently become one of the most unpredictable due to trade policy moves. These shifts will take time to be understood. Amid this uncertainty we encourage wineries to emphasise the exceptional quality and accessibility of Australian wine in discussions with importers and distributors. A weak dollar means Australian wine is already underpriced, and with the domestic market facing cost pressures Australian wine should be viewed as a trusted option in challenging times.”

Canada

In the 12 months ended March 2025, wine exports to Canada declined by 19 per cent in volume to 60 million litres and increased by 3 per cent in value to \$151 million. Average value grew by 27 per cent to \$2.53 per litre.

Figure 12: Value and volume of exports to Canada



All of the volume decline in the last 12 months was in unpackaged wine after a surge in these exports during 2023. Unpackaged wine declined by 27 per cent in volume to 42 million litres (70 per cent of total volume) during the last 12 months. In contrast, exports of packaged wine increased by 8 per cent in volume to 18 million litres (30 per cent of volume) and by 10 per cent in value to \$116 million. The average value of packaged shipments grew by 2 per cent to \$6.41 per litre.

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The growth in average value was driven by a 9 per cent increase in exports with an average value of \$5 and above. Ontario received most of this increase in premium wine shipments and it is possible that this growth is due to changing regulations of alcohol sales in Ontario which are allowing more outlets for beer, wine, and RTD sales in grocery, convenience, and big box stores.

Red wine exports to Canada declined by 25 per cent to 31 million litres. This decline was much steeper than white wine and resulted in a drop in the volume share of red wine from 57 per cent to 52 per cent. White wine declined by 14 per cent in volume to 26 million litres, growing in share from 40 per cent to 43 per cent.

Other markets

Additional markets that were valued at least \$1 million for Australian wine had mixed results:

- United Arab Emirates, declined by 5 per cent to \$16 million,
- Fiji, declined by 5 per cent to \$5.7 million,
- Papua New Guinea, increased by 4 per cent to \$4.1 million,
- South Africa, increased by 1086 per cent to \$4.0 million,
- Brazil, increased by 33 per cent to \$2.2 million,
- Qatar, increased by 47 per cent to \$1.8 million, and
- Vanuatu, declined by 6 per cent to \$1.6 million.

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

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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