

Australia

Country Profile

June 2009

1. AREA UNDER VINES

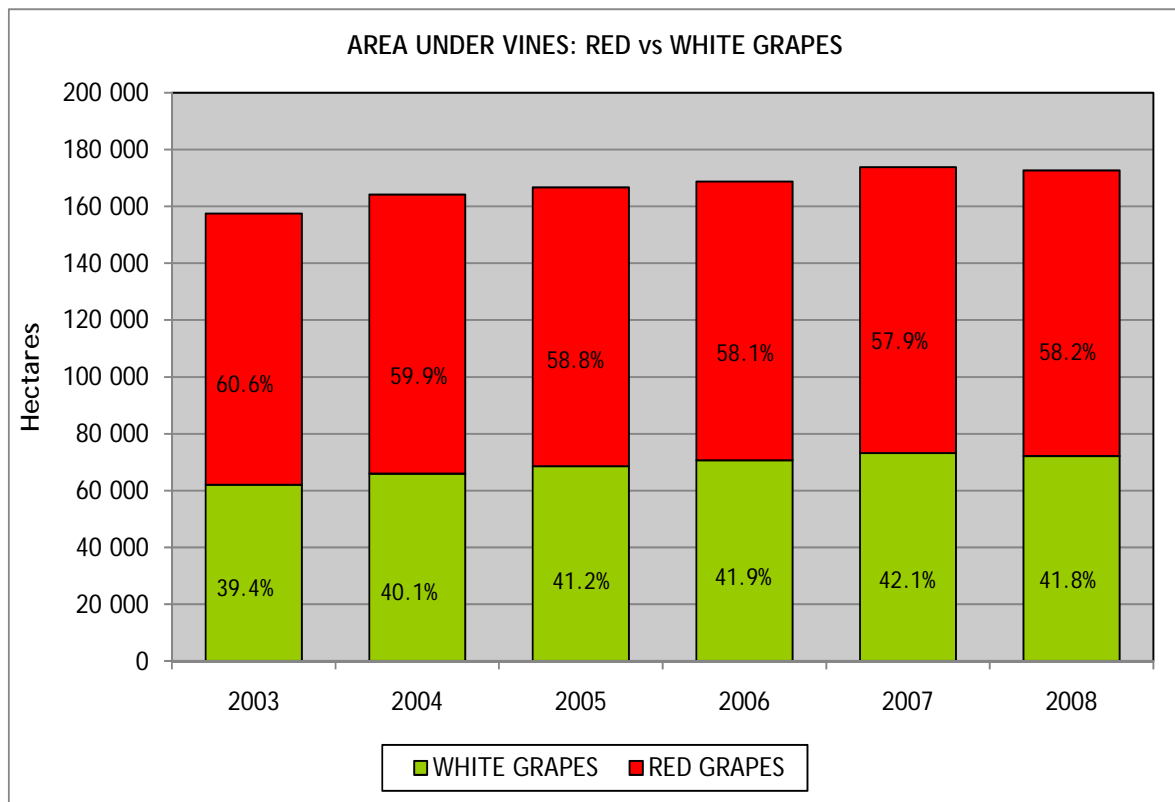
1.1 Total area under vines

The area under vines cultivated in 2008 amounted to 172 676 hectares which was 0.6% lower than in 2007. The total area of grape bearing vines was 166 197 hectares compared to 163 951 hectares in 2007, while the area of vines not bearing grapes was reduced by 34.1% to 6 479 hectares in 2008. The net decrease in area planted (derived from existing vines, vines planted, and vines lost during the year) was 2 288 hectares in 2008, a significant change from the 477 hectares that were added in 2007.

Year	Total area under vines (ha)
1998	98 439
1999	122 915
2000	139 861
2001	148 275
2002	158 594
2003	157 492
2004	164 181
2005	166 665
2006	168 791
2007	173 776
2008	172 676

Source: ABS Wine & Grape Industry 1329.0

1.2 Area distribution of wine grape varieties



	2003		2004		2005	
	hectares	%total	hectares	%total	hectares	%total
WHITE GRAPES						
Chardonnay	24 138	15.3%	28 008	17.1%	30 507	18.3%
Chenin blanc	748	0.5%	761	0.5%	688	0.4%
Colombar	2 705	1.7%	2 819	1.7%	2 704	1.6%
Muscat Gordo Blanco	2 479	1.6%	2 400	1.5%	2 416	1.4%
Pinot Gris			329	0.2%	708	0.4%
Riesling	3 987	2.5%	4 255	2.6%	4 326	2.6%
Sauvignon blanc	2 953	1.9%	3 425	2.1%	4 152	2.5%
Semillon	6 283	4.0%	6 278	3.8%	6 282	3.8%
Sultana	9 685	6.1%	8 570	5.2%	7 286	4.4%
Verdelho	1 612	1.0%	1 618	1.0%	1 603	1.0%
Viognier	541	0.3%	683	0.4%	927	0.6%
Other white grapes	6 870	4.4%	6 745	4.1%	7 033	4.2%
Total	62 001	39.4%	65 891	40.1%	68 632	41.2%
RED GRAPES						
Cabernet Franc	834	0.5%	742	0.5%	633	0.4%
Cabernet Sauvignon	28 871	18.3%	29 313	17.9%	28 621	17.2%
Grenache	2 322	1.5%	2 292	1.4%	2 097	1.3%
Mataro	1 092	0.7%	1 040	0.6%	963	0.6%
Merlot	10 352	6.6%	10 804	6.6%	10 816	6.5%
Petit Verdot	1 337	0.8%	1 623	1.0%	1 439	0.9%
Pinot noir	4 270	2.7%	4 424	2.7%	4 231	2.5%
Ruby Cabernet	2 530	1.6%	1 998	1.2%	1 681	1.0%
Sangiovese	657	0.4%	511	0.3%	488	0.3%
Shiraz	37 016	23.5%	39 182	23.9%	40 508	24.3%
Other red grapes	6 210	3.9%	6 361	3.9%	6 556	3.9%
Total	95 491	60.6%	98 290	59.9%	98 033	58.8%
TOTAL AREA	157 492	100.0%	164 181	100.0%	166 665	100.0%

	2006		2007		2008	
	hectares	%total	hectares	%total	hectares	%total
WHITE GRAPES						
Chardonnay	31 219	18.5%	32 151	18.5%	31 564	18.3%
Chenin blanc	710	0.4%	683	0.4%	642	0.4%
Colombar	2 767	1.6%	2 757	1.6%	2 669	1.5%
Muscat Gordo Blanco	2 433	1.4%	2 568	1.5%	2 364	1.4%
Pinot Gris	1 352	0.8%	2 469	1.4%	2 835	1.6%
Riesling	4 400	2.6%	4 432	2.6%	4 400	2.5%
Sauvignon blanc	4 661	2.8%	5 545	3.2%	6 404	3.7%
Semillon	6 236	3.7%	6 752	3.9%	6 716	3.9%
Sultana	6 611	3.9%	5 781	3.3%	4 979	2.9%
Verdelho	1 697	1.0%	1 782	1.0%	1 761	1.0%
Viognier	1 026	0.6%	1 369	0.8%	1 401	0.8%
Other white grapes	7 568	4.5%	6 864	3.9%	6 458	3.7%
Total	70 680	41.9%	73 153	42.1%	72 193	41.8%
RED GRAPES						
Cabernet Franc	575	0.3%	606	0.3%	693	0.4%
Cabernet Sauvignon	28 103	16.6%	27 909	16.1%	27 553	16.0%
Grenache	2 025	1.2%	2 011	1.2%	2 011	1.2%
Mataro	875	0.5%	794	0.5%	785	0.5%
Merlot	10 593	6.3%	10 790	6.2%	10 764	6.2%
Petit Verdot	1 456	0.9%	1 387	0.8%	1 354	0.8%
Pinot noir	4 254	2.5%	4 393	2.5%	4 490	2.6%
Ruby Cabernet	1 468	0.9%	1 203	0.7%	1 142	0.7%
Sangiovese	425	0.3%	479	0.3%	517	0.3%
Shiraz	41 115	24.4%	43 417	25.0%	43 977	25.5%
Other red grapes	7 222	4.3%	7 634	4.4%	7 197	4.2%
Total	98 111	58.1%	100 623	57.9%	100 483	58.2%
TOTAL AREA	168 791	100.0%	173 776	100.0%	172 676	100.0%

Source: ABS Wine & Grape Industry 1329.0

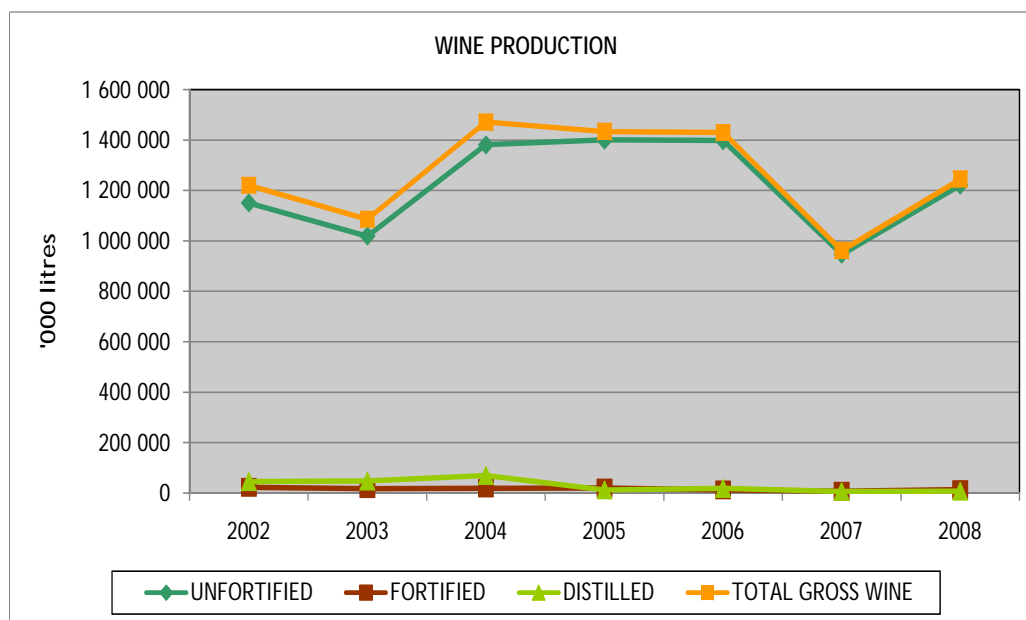
2 PRODUCTION

There were 1.8 million tonnes of grapes harvested for winemaking, an increase of 34.0% on the 2007 harvest. A total of 1 245 million litres of total gross wine were produced in 2008. This wine production figure was 283 million litres (29.4%) more than the total for 2007. Red/rosé wine made up 53.7% and white wine 45.1% of the total gross wine produced in 2008.

Year	Grapes for production of wine	Wine Production (a)			
		Unfortified	Fortified	Distilled wine	Total gross wine
	Ton	'000 litres			
1998	870 627	651 291	28 947	61 309	741 547
1999	1 076 207	771 957	21 433	57 754	851 143
2000	1 111 137	779 149	27 222	52 795	859 166
2001	1 391 074	1 016 306	18 460	41 771	1 076 538
2002	1 514 502	1 150 854	23 247	46 271	1 220 372
2003	1 329 595	1 019 393	18 170	48 423	1 085 985
2004	1 816 556	1 381 064	20 025	70 139	1 471 228
2005	1 818 426	1 400 074	20 275	13 479	1 433 827
2006	1 781 668	1 397 754	12 729	19 305	1 429 788
2007	1 370 690	946 996	8 013	6 962	961 972
2008	1 837 034	1 221 726	14 806	8 245	1 244 776

(a) Includes fortified spirits

Source: ABS Wine & Grape Industry 1329.0



3 DOMESTIC SALES

Domestic sales amounted to 426 million litres in 2008, a decrease of 4.8% on 2007's total of 448 million litres. In terms of volume, red table wine decreased 4.6% to 155 million litres; with white table wine falling 5.5% to 206 million litres. Fortified wines decreased by 1.1% and sparkling wines by 8.3%, while other wine increased by 14.7%.

3.1 Wine Sales

Year	Table	Fortified	Sparkling	Other	Total
	000' Litres				
1998	278 422	24 574	31 069	4 700	338 814
1999	287 398	23 920	32 617	4 400	348 349
2000	307 091	22 991	32 572	6 600	369 271
2001	325 300	22 200	30 700	6 700	384 847
2002	330 300	20 400	29 700r	5 900	386 200
2003	344 500	20 800	31 600	5 500	402 500
2004	355 000	21 200	34 700	6 500	417 400
2005	364 800	19 900	38 400	7 000	430 100
2006	366 800	18 500	39 800	7 300	432 400
2007	380 400	17 400	39 900	10 200	447 800
2008	360 900	17 200	36 600	11 700	426 400

Source: ABS Wine & Grape Industry 1329.0

3.2 Domestic Sales of Table Wine, by container type

The decrease in domestic sales was most evident in sales of wine in glass bottles of less than two litres (-6.8%), followed by sales of wine in soft packs (-4.5%). This was consistent across both red/rosé wine and white wine for both of these container types. In contrast sales of wine in other containers rose significantly, accounting for 7 million litres of total sales, up 45% from 5 million litres in 2007. Three quarters of this was represented by red/rosé wine sales.

	2004	2005	2006	2007	2008
	Million litres				
Bottled (< 2 litre)					
White	84.2	89.5	93.0	100.3	93.5
Red	82.9	91.1	91.8	101.9	94.9
Total	167.1	180.6	184.8	202.2	188.4
Soft packs					
White	120.9	118.8	118.2	116.2	110.4
Red	62.8	63.0	61.1	57.3	55.3
Total	183.7	181.8	179.3	173.5	165.7
Other containers					
White	2.8	1.1	1.4	2.0	2.5
Red	1.4	1.3	1.3	2.7	4.3
Total	4.2	2.4	2.7	4.7	6.8
Table wines (total)					
White	207.9	209.3	212.6	218.5	206.4
Red	147.1	155.5	154.2	161.9	154.5
Total table wine	355.0	364.8	366.8	380.4	360.9

Source: ABS Wine & Grape Industry 1329.0

4 CONSUMPTION

4.1 Per Capita Consumption

The apparent per capita consumption of wine by persons aged 15 years and older increased by 3.9% in 2007 to 29.2 litres per person per year, from 28.1 litres per person per year in 2006.

But when converted to account for alcoholic content, the apparent per person consumption of wine alcohol remained at 3.1 litres per person per year for 2007.

Year	Wine	Beer	Spirits	Total alcohol
	Litres		LAA	
2000	26.0	116.8	1.7	9.6
2001	26.2	116.9	1.8	9.8
2002	26.0	113.4	1.9	9.6
2003	26.8	114.6	2.0	10.0
2004	27.5	110.0	2.1	9.8
2005	28.1	107.6	2.2	9.9
2006	28.1	107.0	2.2	9.9
2007	29.2	106.6	2.3	9.9

Source: ABS Wine and Grape Industry 1329.0

Please Note: Due to the Copyright and Licence Agreement between SAWIS and Euromonitor, access to the following Euromonitor statistics will only be available by emailing Lizelle Arendse, Information Officer at SAWIS (lizelle@sawis.co.za). Only South African Wine Industry role-players will gain access to these statistics. These statistics will be available in electronic and hard copy.

5 RETAIL CONSUMER EXPENDITURE ON ALCOHOLIC DRINKS

6 ALCOHOLIC DRINKS

6.1 Sales of Alcoholic Drinks by Sector - Total Volume

6.2 Sales of Alcoholic Drinks by Sector - Total Value

6.3 Forecast Sales of Alcoholic Drinks by Sector - Total Volume

6.4 Forecast Sales of Alcoholic Drinks by Sector - Total Value

7 SALES OF WINE BY SUBSECTOR

7.1 Total Volume

7.2 Total Value

8 FORECASTS SALES OF WINE BY SUBSECTOR

8.1 Total Volume

8.2 Total Value

9 VOLUME SALES OF WINE BY PRICE SEGMENT

9.1 Red wine

9.2 White wine

9.3 Rosé wine

10 SALES OF WINE BY GRAPE/VARIETAL TYPE

10.1 Red wine

10.2 White wine

10.3 Rosé wine

11 SALES OF WINE BY QUALITY CLASSIFICATION

11.1 Red wine

11.2 White wine

11.3 Rosé wine

12 DISTRIBUTION

12.1 On-trade vs Off-trade Sales of wine - Total Volume

12.2 On-trade vs Off-trade Sales of wine - Total Value

12.3 Off-trade Sales of wine by Distribution Format

13 INTERNATIONAL TRADE

13.1 Total Exports

Wine exports have been increasing steadily over the past ten years and reached a phenomenal 787 million litres in 2007. In 2008, however, exports decreased by more than 72 million litres. The value of these exports fell by more than A\$198 million (-6.9%).

Year	Volume	Value
	'000 litres	A\$ million
1998	193 521	811.7
1999	258 342	1 195.0
2000	310 491	1 487.4
2001	375 096	1 764.2
2002	417 362	2 288.8
2003	518 642	2 423.5
2004	584 397	2 494.1
2005	669 741	2 715.3
2006	721 953	2 756.5
2007	787 209	2 878.6
2008	714 723	2 680.4

*Source: Vintage the Australian Wine Industry Yearbook 2000-2001
Wine Export Approval Report December 2002
ABS Wine & Grape Industry 1329.0*

13.2 Exports by Type

Wine Exports - '000 litres					
Year	Table	Fortified	Sparkling	Other	Total
1998	183 024	2 505	6 110	764	192 404
1999	191 728	2 092	6 434	627	200 881
2000	272 842	2 287	9 088	717	284 935
2001	328 620	2 032	6 546	1 091	338 289
2002	406 207	2 698	8 050	1 438	418 393
2003	506 662	3 035	7 933	1 012	518 642
2004	571 324	2 512	9 806	755	584 397
2005	654 534	2 069	12 445	694	669 741
2006	704 498	2 587	14 341	733	722 159
2007	768 433	2 782	15 368	625	787 209
2008	694 945	2 256	16 311	1 211	714 723

Source: ABS Wine & Grape Industry 1329.0

13.3 Exports by Destination

The UK was the major destination country for Australian wine, importing 268 million litres (37.5%) of all Australian wine exported in 2008. The volume of wine exported to the UK was valued at A\$895 million. The USA imported 185 million litres, worth A\$733 million, of Australian wine in 2008.

Countries	2003	2004	2005	2006	2007	2008
	'000 litres					
Canada	24 456	33 230	44 431	48 859	46 800	47 802
Germany	18 987	28 248	28 400	30 049	23 154	20 518
Hong Kong	2 018	2 391	3 081	3 514	4 252	5 201
Ireland	8 847	9 228	11 629	12 271	13 853	15 466
Japan	5 283	6 269	9 248	8 507	9 115	9 176
Netherlands	17 797	13 204	16 512	22 699	36 796	27 935
New Zealand	32 228	27 191	24 906	26 700	36 394	22 774
Singapore	3 063	4 629	7 494	5 103	7 872	6 051
Sweden	7 798	9 333	7 949	9 058	9 390	8 012
Switzerland	4 961	3 607	2 278	1 660	1 558	1 566
UK	209 547	224 739	263 617	261 511	269 076	268 098
USA	150 945	174 655	188 658	204 907	215 217	185 427
Other	32 712	47 673	61 538	87 321	113 732	96 697
TOTAL	518 642	584 397	669 741	722 159	787 209	714 723

Source: *Wine Export Approval Report June 2002*
ABS Wine & Grape Industry 1329.0

13.4 Imports by Type

Imports of total wine to Australia amounted to 53,3 million litres in 2008, up a significant 55.6% on 2007. This is mainly due to a 98.3% increase in the volume of table wine imported.

Year	Sparkling	Table wine	Fortified	Other	Total
	Litres				
1998	2 996 000	21 447 000	135 000	1 044 000	25 622 000
1999	2 915 000	20 136 000	92 000	1 113 000	24 255 000
2000	3 827 000	14 099 000	685 000	995 000	19 607 000
2001	2 913 000	7 298 000	106 000	2 457 000	12 774 000
2002	3 282 000	8 589 000	201 000	2 407 000	14 479 000
2003	3 851 000	11 070 000	190 000	2 001 000	17 113 000
2004	4 787 000	11 817 000	734 000	1 399 000	18 737 000
2005	5 186 000	14 782 000	271 000	1 899 000	22 139 000
2006	5 923 000	19 597 000	133 000	1 511 000	27 165 000
2007	6 990 000	25 490 000	123 000	1 661 000	34 264 000
2008	8 267 000	42 580 000	159 000	2 306 000	53 312 000

Source: ABS Wine & Grape Industry 1329.0

13.5 Imports by Country of Origin

Country	2005		2006		2007		2008	
	Volume '000 litres	Value A\$ '000	Volume '000 litres	Value A\$ '000	Volume '000 litres	Value A\$ '000	Volume '000 litres	Value A\$ '000
Argentina	149	409	105	349	55	246	2 059	1 758
Chile	387	1 314	476	1 961	586	2 439	4 449	7 284
France	3 492	66 958	4 562	79 897	5 353	96 998	7 087	142 858
Germany	448	1 964	411	2 163	901	3 347	557	2 935
Greece	285	817	231	564	236	616	249	625
Italy	4 937	25 105	5 450	28 267	5 544	32 070	7 116	40 521
New Zealand	9 479	80 088	13 228	108 523	18 142	155 911	23 859	209 401
Portugal	418	1 535	894	2 658	482	2 050	723	2 888
South Africa	179	779	299	1 166	517	1 382	2 527	5 521
Spain	684	3 868	796	3 925	947	4 900	1 167	7 265
UK	31	605	73	1 787	68	587	66	519
USA	1 084	1 850	158	783	198	1 485	555	1 675
Other	566	2 948	482	2 054	1 235	4 319	2 898	8 132
TOTAL	22 139	188 240	27 165	234 097	34 264	306 350	53 312	431 382

Source: ABS Wine & Grape Industry 1329.0

14 PRICES

	2003	2004	2005	2006	2007	2008
	A\$/ton					
White varieties						
Canada Muscat	249	-	409	-	-	-
Chardonnay	1 060	1 054	821	543	539	670
Chenin Blanc	466	366	509	490	529	630
Colombard	370	357	342	290	299	420
Crouchen	445	-	485	481	489	500
Doradillo	256	-	254	-	-	
Marsanne	305	569	600	734	664	691
Muscadelle	-	678	609	807	843	799
Muscat Blanc	520	401	523	556	495	553
Orange Muscat	1 141	-	1 164	-	-	-
Palomino	260	-	320	-	-	-
Pedro Ximenes	280	-	456	-	-	-
Pinot Gris	1 522	1 402	1 164	1 088	1 015	1 015
Riesling	1 016	1 013	983	808	834	993
Roussanne	372	245	1 184	1 346	1 250	1 179
Sauvignon Blanc	1 056	1 084	1 115	1 052	1 140	1 185
Semillon	614	589	612	528	579	620
Taminga	270	315	375	321	333	496
Traminer	555	534	506	519	506	615
Trebbiano	312	334	325	283	274	353
Verdelho	647	612	626	570	658	662
Viognier	1 224	1 146	1 160	938	796	937

	2003	2004	2005	2006	2007	2008
	A\$/ton					
Red varieties						
Barbera	532	310	605	549	736	831
Cabernet Franc	829	676	723	739	777	908
Cabernet Sauvignon	967	814	658	620	712	907
Chambourcin	915	717	904	670	222	965
Durif	504	536	488	471	546	568
Grenache	800	783	700	619	683	957
Malbec	873	655	759	786	916	1 021
Mataro	1125	510	518	474	581	795
Merlot	864	718	646	578	616	745
Muscat Brown	382	872	821	957	1 139	1 184
Nebbiolo	649	809	1 080	1 226	1 088	1 346
Petit Verdot	592	463	427	399	440	559
Pinot Noir	1275	1 167	1 036	1 023	1 253	1 455
Rubired	235	388	325	-	-	-
Ruby Cabernet	437	380	304	300	342	435
Sangiovese	726	664	604	532	672	692
Shiraz	1005	892	811	715	739	978
Tarrango	560	525	435	356	302	504
Tempranillo	692	789	836	672	738	999
Zinfandel	456	384	552	509	553	659

Source: 2008 NATIONAL WINEGRAPE CRUSH & PRICE REPORT