

**Wine
Australia**

Market Insights

Export Report

12 months to 30 June 2025

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Executive summary

- Australian wine exports increased by 13 per cent in value to \$2.48 billion and 3 per cent in volume to 639 million litres.
- The year-on-year increase in exports was almost entirely driven by mainland China after tariffs on Australian bottled wine were removed at the end of March 2024.
- Over 12 months have passed since tariffs in mainland China were removed and the initial surge in exports has eased. The quarter ended June 2025 was 35 per cent smaller in value than the same quarter in the previous year.
- Exports to the rest of the world declined by 11 per cent in value to \$1.59 billion and 6 per cent in volume to 554 million litres.
- The decline in value to the world excluding mainland China was driven by Hong Kong, while the volume drop was primarily driven by the United States and United Kingdom.
- Shipments to the United States continued their decline as high wholesaler inventories of alcohol and market uncertainty persists.
- Unpackaged shipments drove the decline to the UK, offsetting increased packaged shipments.
- Shipments with an average value of \$7.50 per litre and above were the main driver of increased export value to Canada, possibly assisted by the removal of American wines from Canadian outlets.

Overview

In the 12 months ended June 2025, Australian wine exports increased by 13 per cent in value to \$2.48 billion¹. Volume also increased, by 3 per cent to 639 million litres. The average value of exports increased by 10 per cent to \$3.88 per litre Free on Board (FOB)².

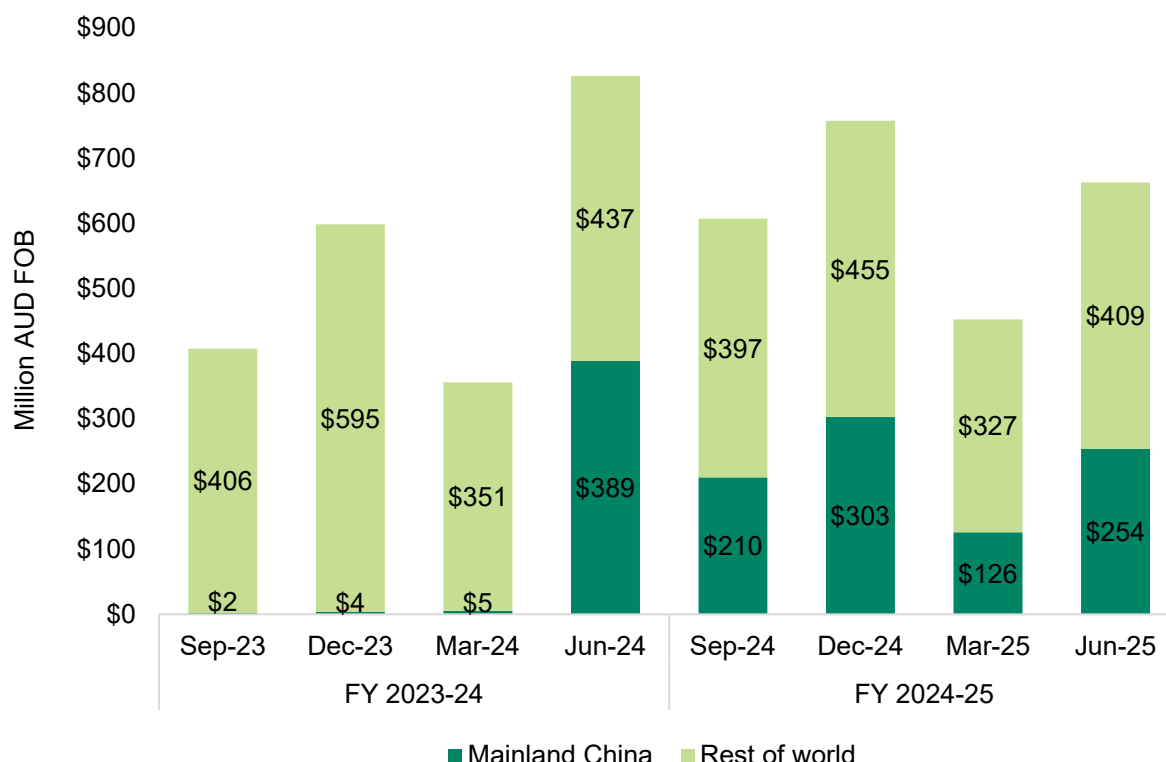
The year-on-year increase in exports was almost entirely driven by mainland China after tariffs on Australian bottled wine were removed at the end of March 2024. Over 12 months have passed since tariffs in mainland China were removed and the initial surge in exports has eased. Figure 1 illustrates the downward trend in export value to the market since the initial re-stocking phase in the June 2024 quarter.

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: Quarterly export value – mainland China vs rest of world



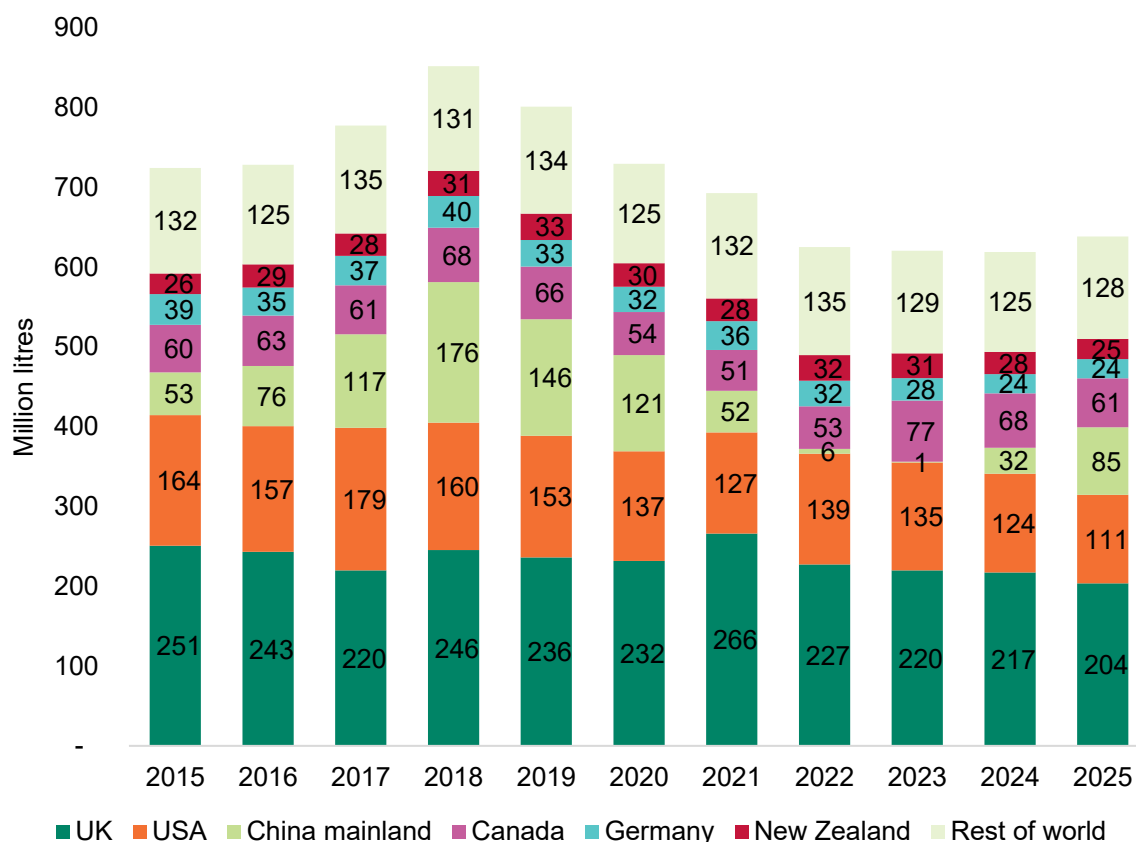
Exports to the rest of the world declined by 11 per cent in value to \$1.59 billion. This was mostly due to a high level of shipments to Hong Kong in December 2023, potentially driven by exporters anticipating the removal of import tariffs in mainland China. This was a temporary, unique scenario that led to a high value of shipments in that quarter (see Figure 1) and was not repeated in the last 12 months.

Export volume to the rest of the world declined by 6 per cent to 554 million litres. From a supply perspective, this reflects reduced wine production in Australia over the last three years, meaning less wine is available for export. On the demand side, this is in line with the long-term trend of declining consumption in key export destinations such as the United Kingdom, the United States, Germany, and New Zealand. Although export value to these destinations is more resilient due to consumers drinking less wine but better quality at higher prices, export volume has declined (see Figure 2). According to IWSR, global wine consumption fell by 3 per cent in 2024, driven by many of the destinations that Australian wine has traditionally relied upon. 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 have accelerated these trends. It is also possible that these pressures could worsen in certain markets, given current economic and geopolitical volatility.

Figure 2 also illustrates that even though the return of mainland China offers a valuable market at a time of global decline, it has only had a small impact on total export volume as the volume shipped to mainland China is now half of what it was at its peak in 2018 (85 vs 176 million litres).

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Figure 2: Export volume to top destinations, 12 months ended June



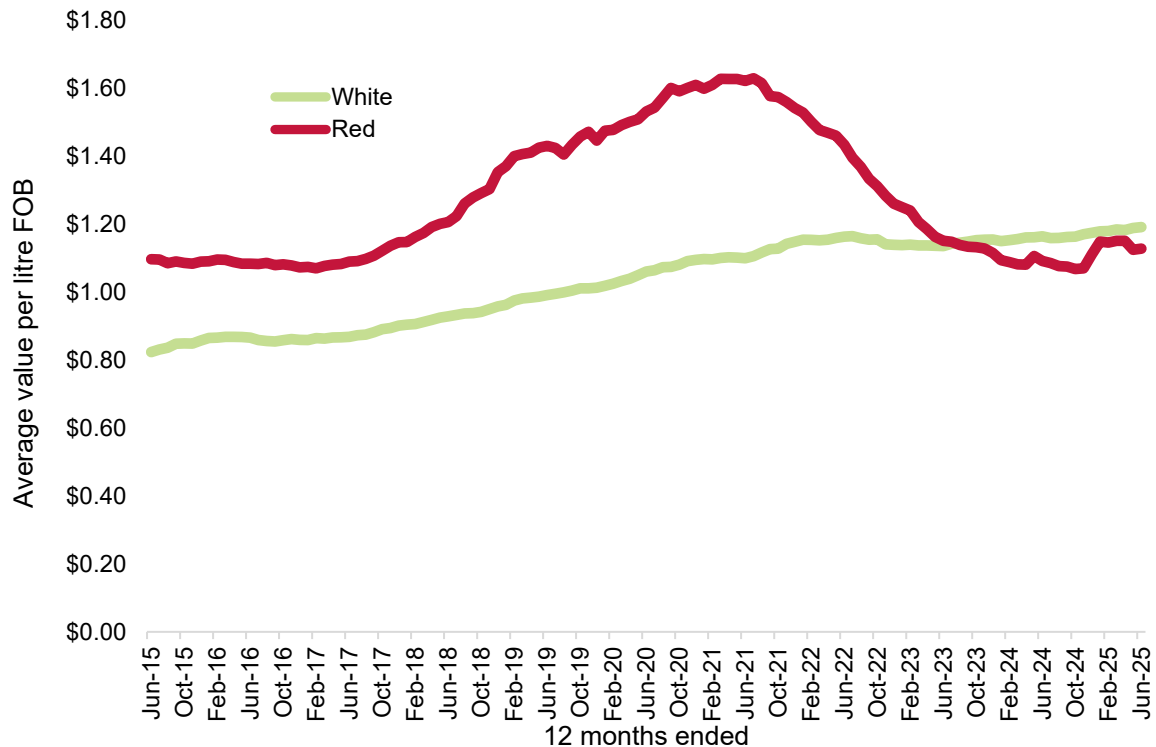
Container type

In the 12 months ended June 2025, exports of Australian packaged wine increased by 16 per cent in value to \$1.99 billion and 6 per cent in volume to 213 million litres. Average value climbed by 9 per cent to \$9.36 per litre FOB as a result. The growth in packaged exports was mainly driven by mainland China, although Canada, Singapore, and Malaysia also showed good growth. 97 per cent of packaged export volume was exported in glass bottle, while 2 per cent was soft-pack (cask) and less than 1 per cent in alternative packaging.

Exports of unpackaged wine (to be packaged at the destination) increased by 4 per cent in value to \$490 million and 2 per cent in volume to 426 million litres. Average value increased by 3 per cent to \$1.15 per litre FOB. Both red and white bulk wine drove the slight increase in average value, and red wine started to recover after its recent decline but remains low (see Figure 3).

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Figure 3: Average value of unpackaged wine exports by colour



Winestyle

Red wine exports increased by 19 per cent in value to \$1.84 billion and 9 per cent in volume to 360 million litres. The average value of red wine increased by 9 per cent to \$5.11 per litre FOB. Mainland China was the biggest driver as the majority of exports to that market are red wine; however, the value of red wine exports also grew to Singapore, Canada, and Malaysia.

The top five exported varieties in red wine were:

- Shiraz, up 11 per cent to 160 million litres,
- Cabernet Sauvignon, up 8 per cent to 95 million litres,
- Merlot, up 2 per cent to 40 million litres,
- Pinot Noir, up 7 per cent 5.1 million litres, and
- Petit Verdot, up 4 per cent to 3.9 million litres.

Australia white wine exports declined by 1 per cent in value to \$594 million and 4 per cent in volume to 262 million litres. Average value increased by 3 per cent to \$2.27 per litre FOB. The decline in volume resulted in the share of white wine declining from 44 per cent to 41 per cent of exports in the last 12 months. The United States was the largest contributor to the decline, followed by the United Kingdom. Some of the decrease was offset by growth in white wine exports to mainland China and Canada.

The top five varieties in white wine exports were:

- Chardonnay, down 5 per cent to 138 million litres,
- Pinot Gris/Grigio, down 3 per cent to 44 million litres,
- Sauvignon Blanc, down 6 per cent to 25 million litres,
- Colombard, down 2 per cent to 8.3 million litres, and
- Muscat Gordo Blanco, up 18 per cent to 5.7 million litres.

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Exports of rosé wine declined by 4 per cent in value during the 12 months ended June 2025, with growth to Canada and mainland China unable to offset losses in exports to a number of markets including the United Kingdom, Thailand, Singapore, New Zealand, and Sweden.

Price points

In the 12 months ended June 2025, Australian wine exports with an average value below \$5 per litre increased by 1 per cent in volume to 553 million litres (an 87 per cent share of total volume). This was driven primarily by exports valued below \$2.49 per litre (see Figure 4), most of which are unpackaged and thus do not include packaging cost. An increase in exports to mainland China and South Africa in this price segment drove the increase, while some of the growth was offset by declining exports to the United Kingdom, Canada, and the United States.

Figure 4: Export volume by price segment (\$/litre FOB)

Price segment	MAT June 2024		MAT June 2025		
	Million litres	Share of total	Million litres	% change	Share of total
\$2.49 and under	417.5	67.4%	421.5	1.0%	66.0%
\$2.50 to \$4.99	131.4	21.2%	131.4	0.0%	20.6%
<i>Subtotal below \$5</i>	<i>548.9</i>	<i>88.6%</i>	<i>552.9</i>	<i>0.7%</i>	<i>86.6%</i>
\$5.00 to \$7.49	30.3	4.9%	38.7	27.6%	6.1%
\$7.50 to \$9.99	12.3	2.0%	14.5	17.5%	2.3%
\$10.00 to \$14.99	11.0	1.8%	13.4	21.8%	2.1%
\$15.00 to \$19.99	2.9	0.5%	3.5	22.5%	0.6%
\$20.00 to \$29.99	5.6	0.9%	4.9	-13.7%	0.8%
\$30.00 to \$49.99	2.6	0.4%	4.3	64.8%	0.7%
\$50.00 to \$99.99	5.1	0.8%	5.3	5.2%	0.8%
\$100.00 to \$199.99	0.4	0.1%	0.9	139.2%	0.1%
\$200.00 and over	0.2	0.0%	0.2	45.9%	0.0%
<i>Subtotal \$5 and above</i>	<i>70.3</i>	<i>11.4%</i>	<i>85.6</i>	<i>21.8%</i>	<i>13.4%</i>
Total	619.2	100.0%	638.5	3.1%	100.0%

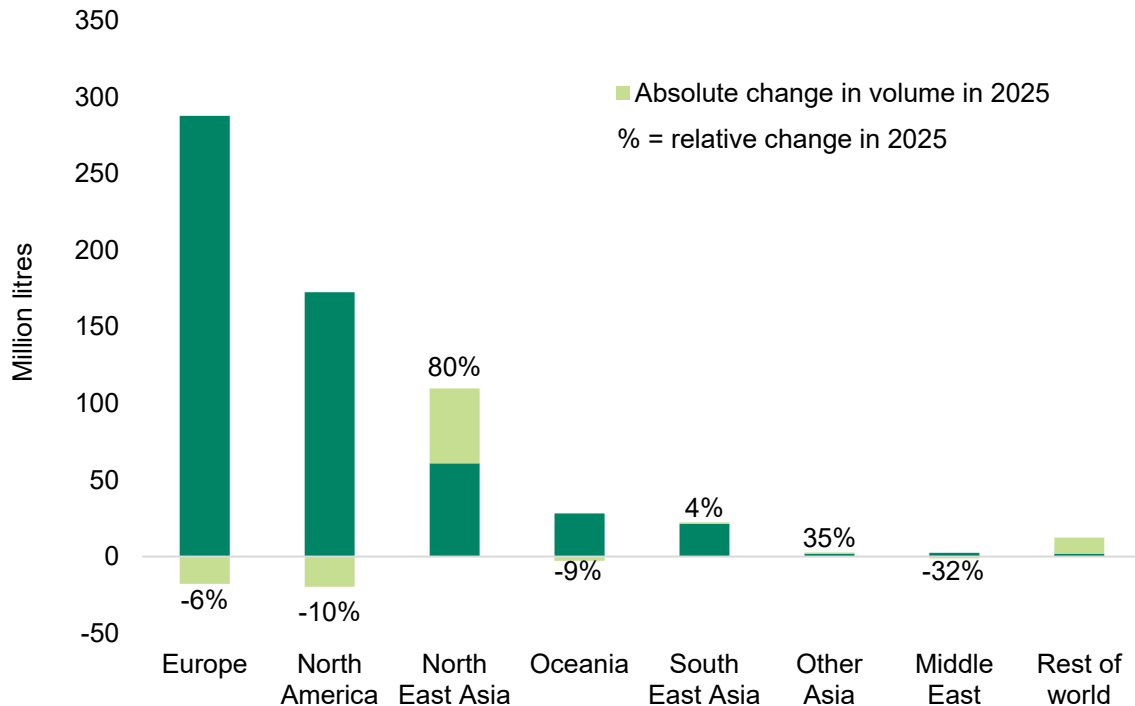
Exports with an average value of \$5 per litre and above increased by 22 per cent to 86 million litres. Most of the volume increase came from the \$5 to \$7.49 per litre price segment, driven by mainland China. China was also the main contributor to the increases across the higher price segments, while Canada also made a positive contribution to the growth in this segment.

Destinations

Australian wine was exported to 116 destinations in the 12 months to June 2025, up from 115 in the previous 12 months.

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Figure 5: Australian wine exports by region (Million litres)



Europe is the largest region for Australian wine exports by volume and shipments declined by 6 per cent to 288 million litres in the last 12 months. Exports to the United Kingdom were the main contributor to the decline in volume in the region.

Exports to North America also declined, by 10 per cent to 173 million litres, driven mostly by exports to the United States. While the volume of exports declined to Canada, value increased due to a higher level of premium (above \$7.50 per litre) wine exports to the market in the last 12 months.

North East Asia was the growth driver during the 12 months to June 2025, increasing by 80 per cent in volume to 110 million litres. However, mainland China and South Korea were the only destinations in the region that grew in volume in the last 12 months.

Exports to South East Asia recovered somewhat, with more positive results in the volume of exports to Thailand, Singapore, and Malaysia.

The top destinations by value were:

- Mainland China, up 123 per cent to \$893 million,
- United Kingdom, down 1 per cent to \$350 million,
- United States, down 12 per cent to \$314 million,
- Canada, up 7 per cent to \$157 million, and
- Hong Kong, down 54 per cent to \$127 million.

The top destinations by volume were:

- United Kingdom, down 6 per cent to 204 million litres,
- United States, down 10 per cent to 111 million litres,
- Mainland China, up 162 per cent to 85 million litres,
- Canada, down 10 per cent to 61 million litres, and
- New Zealand, down 9 per cent to 25 million litres.

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Wine Australia's General Manager, Market Development, Paul Turale said, "The commentary for the 12 months ended June 2025 broadly reflects that provided in recent updates with high global stock levels, sustained geo-political and economic uncertainty continuing to weigh on market and consumer sentiment, impacting discretionary spend on 'luxury' items such as wine, globally.

Recent reporting shows that global wine consumption has dropped to levels not seen in over 60 years.

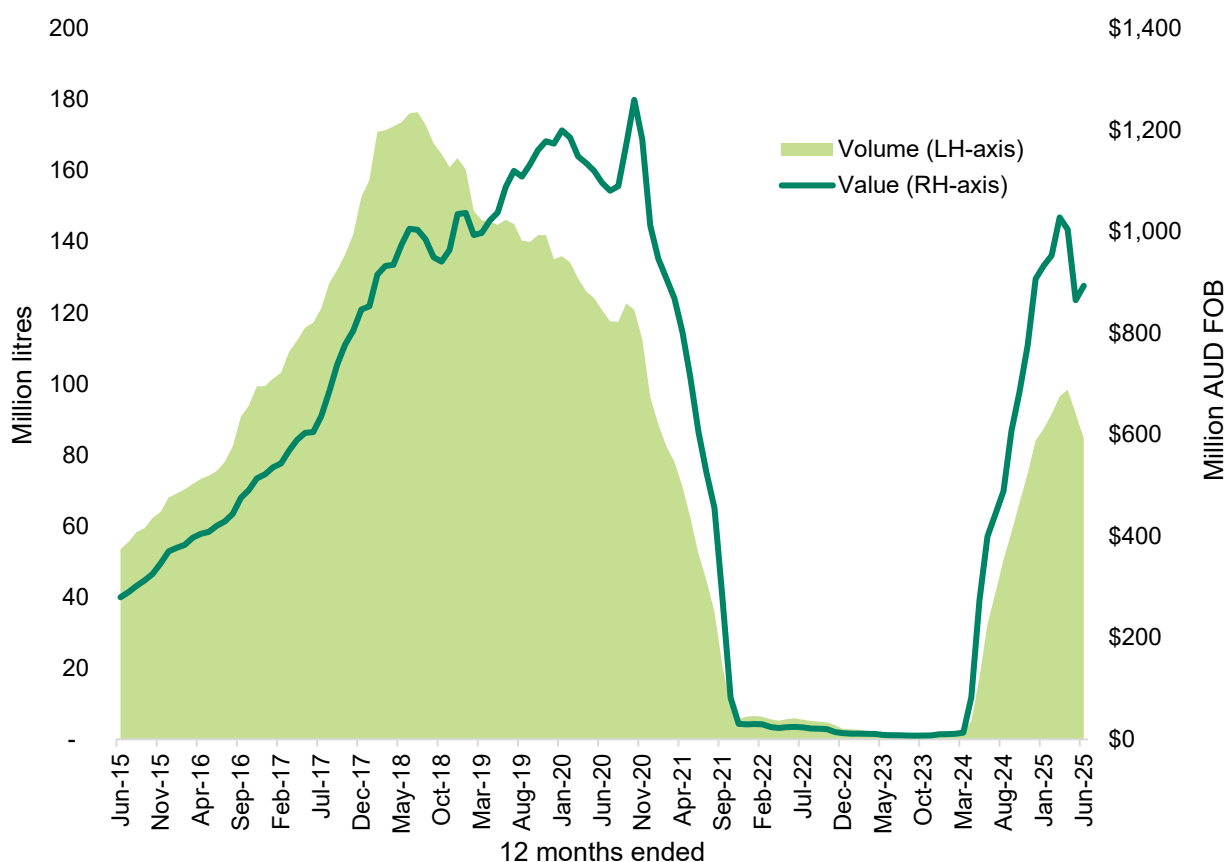
We remain committed to building a strong portfolio of markets, leveraging insights and expanding category entry points to position Australia wine for success as demand rebounds in international pockets around the world and in Australia."

Asia

Mainland China

In the 12 months to June 2025, Australian wine exports to mainland China increased by 123 per cent in value to \$893 million and 162 per cent in volume to 85 million litres. The average value of exports declined by 15 per cent to \$10.55 per litre FOB. Both volume and value for the 12 months ended June 2025 were lower than the 12 months ended March 2025 (see Figure 6) as the initial quarter of exports after the tariffs were removed shifted into the previous period. The quarter ended June 2025 was 35 per cent smaller in value than the same quarter in the previous year. This indicates that the level of exports to mainland China may be stabilising after the initial re-stocking phase.

Figure 6: Volume and value of exports to mainland China



Total volume shipped to China was also much lower than the years before tariffs were introduced. Volume shipped in the 12 months ended June 2025 was 30 per cent lower than June 2020 and 52

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per cent lower than the peak in June 2018. Due to the premium nature of packaged exports to the market, value has recovered more quickly. Nonetheless, value in the 12 months ended June 2025 was 18 per cent lower than June 2020. This is a reflection of the decline in wine consumption in the Chinese market over the last five years; the market is now a third of the size it was in 2019³. Imports from France, Italy, Spain, and Chile have all declined in the last 12 months⁴.

There were 39 million litres of packaged exports (mostly in glass bottle) to mainland China, worth \$836 million, in the 12 months to June 2025. The average value of these exports was \$21.30 per litre FOB, much higher than any other major export market. Packaged exports have a 46 per cent share of volume and a 94 per cent share of value to the market. Unpackaged exports totalled 45 million litres, worth \$57 million for the period. The average value of unpackaged exports was \$1.26 per litre FOB.

Red wine exports contributed 88 per cent of the volume shipped to mainland China in the 12 months ended June 2025. White wine exports had an 11 per cent volume share, much higher than 5 per cent in the year ended June 2020.

Rest of Asia

Excluding mainland China, exports to Asia declined by 4 per cent in volume to 50 million litres and 24 per cent in value to \$467 million.

The decline was primarily driven by Hong Kong, after a high level of shipments to the market in December 2023, potentially driven by exporters anticipating the removal of import tariffs in mainland China. This was a temporary, unique scenario that led to a high value of shipments in that quarter and was not repeated in the last 12 months.

Figure 7: 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	7.6	-25%	3%	\$126.5	-54%	7%
Singapore	6.1	4%	-2%	\$113.3	14%	3%
Japan	10.7	-13%	-6%	\$46.0	0%	-1%
South Korea	4.5	26%	6%	\$25.9	-9%	4%
Malaysia	2.7	10%	3%	\$42.4	23%	6%
Thailand	7.8	6%	20%	\$45.3	-22%	21%
Taiwan	2.5	-5%	2%	\$24.5	-4%	4%
Indonesia	0.5	-43%	-14%	\$5.3	-32%	-19%
Philippines	2.6	-3%	3%	\$12.8	-7%	1%
India	2.0	25%	5%	\$9.5	40%	5%
Vietnam	1.9	-8%	22%	\$7.6	-18%	11%
Cambodia	0.3	22%	1%	\$1.6	25%	-1%
Sri Lanka	0.3	26%	17%	\$1.4	32%	11%
Macao	0.0	-74%	-6%	\$0.3	-94%	-4%
Others	0.9	316%	25%	\$4.6	133%	23%
Total	50.1	-4%	2%	\$467.1	-24%	5%

There were some positive signs of growth from other markets in the region – Singapore grew by 4 per cent in volume, South Korea by 26 per cent, Malaysia by 10 per cent, and Thailand by 6 per cent. Despite the emerging nature of these wine markets, the region is still on a long-term growth trajectory – growing by 2 per cent per annum in volume and 5 per cent in value on average.

³ IWSR

⁴ Trade Data Monitor

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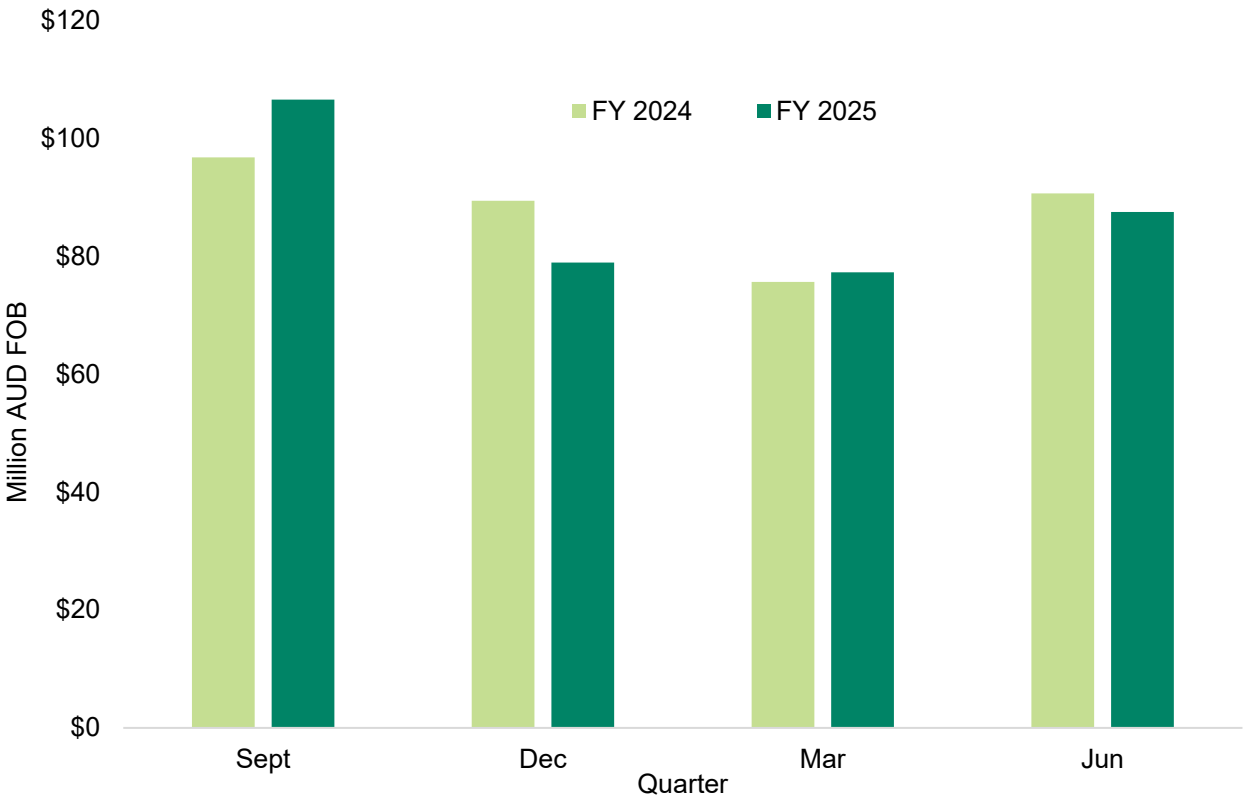
Europe

United Kingdom

Australian wine exports to the United Kingdom (UK) declined by 1 per cent in value to \$350 million and 6 per cent in volume to 204 million litres. The average value of exports increased by 6 per cent to \$1.72 per litre FOB. It should be noted that 90 per cent of exports to the UK are unpackaged (to be packaged in market and then sold in the UK or re-exported elsewhere in Europe) resulting in a low average value for the market as these exports do not include packaging costs.

The last 12 months have been relatively stable by export value (see Figure 8), despite significant economical and administrative headwinds in the market, including cost-of-living pressures and duty reforms. Consumers are down-trading, moderating, and limiting their on-premise visits as a result. The number of Australian wine exporters to the UK has remained resilient through this period – growing by 4 companies to 312 – the second largest market by number of exporters after mainland China. Australia is the number one source of wine in the UK off-premise with a 23 per cent value share⁵, well ahead of Italy at number two with 13 per cent, and is less exposed to challenges in the on-premise due to a lower share of sales (8 per cent of value)⁶.

Figure 8: Value of exports to the UK by quarter



Driving the volume decline in Australian wine exports to the UK in the last 12 months was unpackaged wine. This segment of exports declined by 7 per cent in volume and 2 per cent in value. Offsetting some of this loss was packaged wine exports – increasing by 1 per cent in volume and 3 per cent in value. Packaged exports with an average value between \$2.50 and \$4.99 and above \$7.50 per litre drove this increase, growing by 4 and 20 per cent in volume respectively.

⁵ Circana
⁶ CGA by NIQ

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Both red and white wine declined in volume, by 7 and 5 per cent respectively. White wine gained 1 per centage point in volume share, at the expense of red wine, to reach 45 per cent of exports. Red wine fell to a 52 per cent share, and rosé remained at 3 per cent.

Wine Australia's Regional General Manager EMEA, Laura Jewell MW said, "The cost-of-living pressures continue to affect sales of wine in both the on-premise and the off-premise in the UK, although dropping inflation rates and the early good weather offer hopes of a better quarter across the summer. There has been some consolidation in the trade, leading to changes in distribution for a number of wineries and brands. Uncertainty in the Middle East is adding to shipping costs on top of the increased administration costs of the new duty rates. It is still a challenging marketplace, but it is good to see the increase in packaged shipments at the premium end."

Rest of Europe

The European region, excluding the UK, declined by 9 per cent in value to \$161 million and 5 per cent in volume to 84 million litres.

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.

In the last 12 months, the decline in the volume of exports to Germany, Netherlands, Belgium, and France heavily impacted the results for the region (see Figure 9). However, shipments to Denmark, Sweden, Ireland, and Poland all increased in volume, mainly due to increased unpackaged exports.

Figure 9: 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
Denmark	19.3	8%	0%	\$28.1	-3%	-6%
Germany	24.0	-1%	-5%	\$26.0	-8%	-12%
Sweden	6.9	15%	4%	\$21.7	2%	-2%
Netherlands	5.8	-23%	-17%	\$19.2	-25%	-13%
Belgium	9.2	-21%	2%	\$16.8	-3%	0%
France	7.3	-8%	0%	\$11.7	-18%	-1%
Finland	4.3	-16%	-2%	\$8.9	-10%	-5%
Ireland	2.2	8%	-7%	\$8.8	2%	-2%
Poland	2.0	24%	8%	\$4.9	33%	4%
Norway	1.0	-17%	-12%	\$4.5	-17%	-7%
Latvia	0.6	24%	6%	\$3.4	31%	9%
Switzerland	0.9	-50%	-3%	\$3.1	-44%	-9%
Spain	0.2	61%	-16%	\$0.7	83%	-11%
Czech Republic	0.1	-53%	-13%	\$0.6	-49%	-12%
Others	0.5	-21%	-26%	\$3.1	-19%	-22%
Total	84.3	-5%	-4%	\$161.5	-9%	-7%

North America

United States

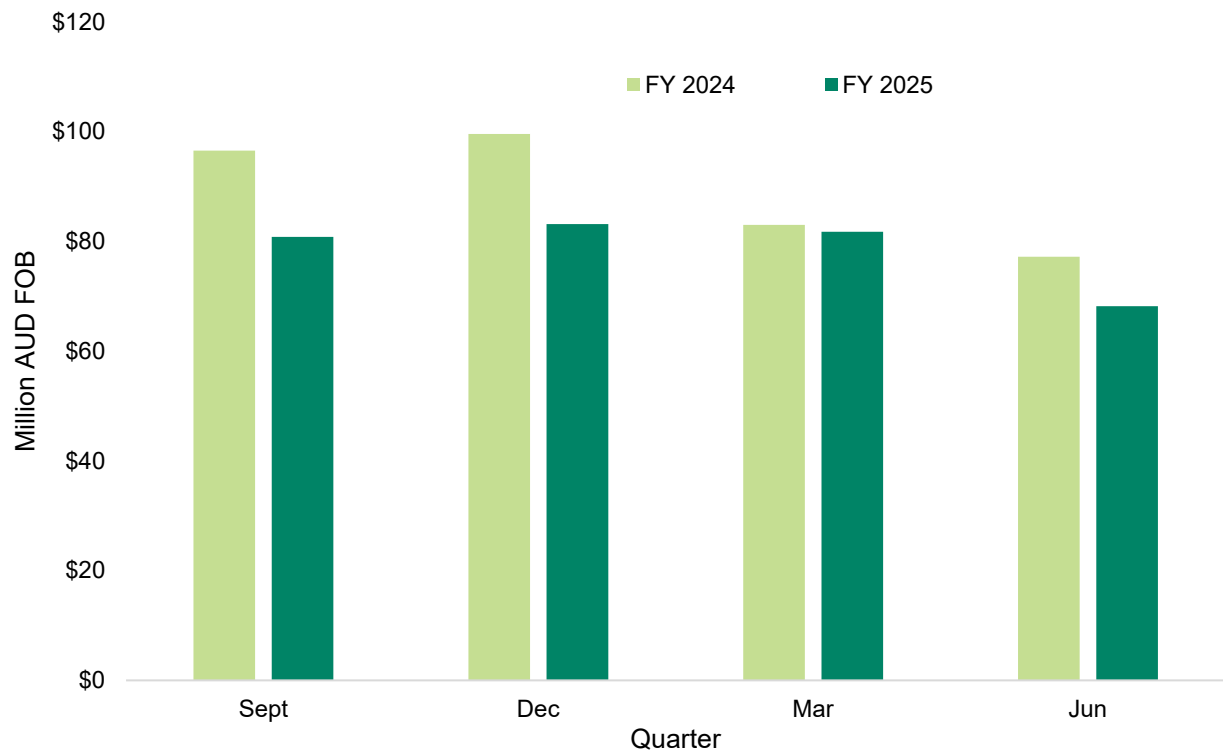
Australian wine exports to the United States (US) declined by 10 per cent in volume to 111 million litres and 12 per cent in value to \$314 million, the lowest value in over two decades. Average value declined by 2 per cent to \$2.83 per litre FOB.

As illustrated in Figure 10, the last 12 months shows a consistent shrinking of exports to the US market, which is a continuation of the downward trend over the last couple of years. The US wine market is facing several headwinds that have developed since the COVID-19 pandemic, leading to reduced wine consumption over the last five years. According to IWSR, the volume of wine

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consumption fell by 5 per cent in 2024 and is forecast to decline a further 4 per cent per year in the next five years. In fact, Impact Databank is reporting that total spirits volume is expected to surpass wine sales volume in 2025 for the first time in over 45 years. Health and wellness concerns, especially in the older generations who drink the most wine, are having an impact on the amount of wine consumed per capita. Meanwhile the wine category is also struggling to recruit more consumers from the younger generations and facing more competition from other beverages. Additionally, alcohol inventory is still at historical highs, resulting in wholesalers, retailers, and on-premise venues refining and cutting their listings. Recent political turmoil is also causing consumer confidence to decline, which is likely to result in more cautious discretionary spending in the near-term.

Figure 10: Value of exports to the US by quarter



The main driver of the decline in Australian wine exports was packaged shipments, which decreased by 13 per cent in value to \$248 million and 16 per cent in volume to 53 million litres. The key price segment behind this decline was exports with an average value between \$2.50 and \$4.99 per litre FOB; this is consistent with total market trends where most of the decline is in the lower price segments. Because most of the decline was in lower price segments, the average value of packaged exports to the US rose by 4 per cent to \$4.66 per litre FOB.

Unpackaged exports also declined, by 9 per cent in value to \$66 million and 5 per cent in volume to 58 million litres. Average value dropped by 4 per cent to \$1.13 per litre.

Most of the volume decline in the 12 months to June 2025 was attributed to white wines, which declined in volume by 15 per cent. White wine’s volume share of exports dropped from 59 per cent in 2024 to 56 per cent. Red wine also declined in volume, by 5 per cent, and grew from a 41 per cent share to 43 per cent.

Wine Australia’s Regional General Manager Americas, Aaron Ridgway said, “We’ve seen some growth between US\$20 and US\$30 per bottle retail, but not enough to balance the declines below US\$10, which is where the majority of Australian wine is sold in the US. The oversupply issues are likely to persist as importers and distributors look to Washington for greater clarity on tariffs and

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other economic factors that create risk. Even wine’s long-supported trend toward premiumisation is less certain than a few years ago – many young people cite price as a reason for not drinking wine, so brands need to demonstrate a clear value proposition more than ever.”

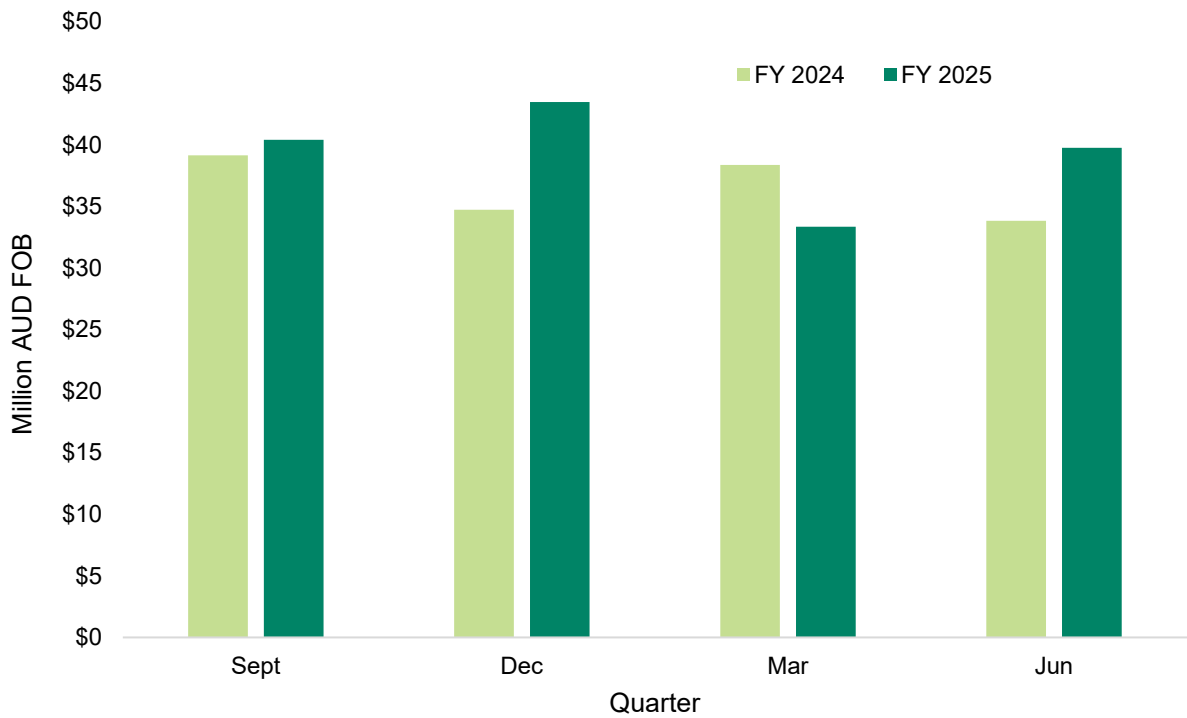
Canada

In the 12 months ended June 2025, Australian wine exports to Canada increased by 7 per cent in value to \$157 million and declined by 10 per cent in volume to 61 million litres. As a result, average value grew by 20 per cent to \$2.56 per litre FOB, the highest average value in over two years.

The decline in volume, and subsequent rise in average value, is partially driven by a decline in unpackaged exports after a surge in this type of exports during 2023. Unpackaged wine exports declined by 16 per cent in volume to 43 million litres and 4 per cent in value to \$37 million. The average value of unpackaged wine exports increased by 14 per cent to \$0.85 per litre FOB.

The rise in overall export value to the market can be attributed to a growth in packaged exports in the last 12 months. Packaged exports increased by 8 per cent in volume to 18 million litres and 12 per cent in value to \$120 million. A 3 per cent increase in the average value of packaged exports was the result of most of the growth coming from exports valued above \$7.50 per litre FOB. This segment of exports increased by 27 per cent in value and every province contributed to the growth.

Figure 11: Value of exports to Canada by quarter



The growth in export value during the June 2025 quarter (see Figure 11) is possibly assisted by Australian brands currently on the shelf in Canada increasing in sales due to the removal of American wines across Canadian liquor boards in retaliation for tariffs on Canadian products imported into the United States. Data from the liquor board in Quebec (SAQ) indicates that American wine sales fell to zero in the quarter ended May 2025, while most other sources grew. Australia, Chile, South Africa, and Argentina outperformed the larger European sources of France, Italy, and Spain in percentage growth for the quarter.

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Other markets

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

- United Arab Emirates, down by 26 per cent to \$13 million,
- Fiji, down 0.4 per cent to \$5.8 million,
- South Africa, up 1747 per cent to \$5.5 million,
- Papua New Guinea, down 19 per cent to \$3.5 million,
- Brazil, up 59 per cent to \$2.1 million, and
- Vanuatu, down 20 per cent to \$1.3 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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