



USDA Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Template Version 2.09

Required Report - public distribution

Date: 6/8/2005

GAIN Report Number: AS5018

Australia

Wine

Annual

2005

Approved by:

Andrew C. Burst, Agricultural Counselor
U.S. Embassy

Prepared by:

Mike Darby, Agricultural Specialist

Report Highlights:

Australian wine grape production is forecast at 1,829 TMT in 2005/06, up slightly from 2004/05. Dry conditions and a decline in plantings will likely constrain production somewhat. Wine production is forecast at 12.8 million hectoliters (MHL) in 2005/06, also up slightly. Wine exports in 2005/06 are forecast at 7.6 MHL, up 14 percent. Changing lifestyles and relatively strong economic growth over the past decade have boosted domestic wine consumption. Imports are small but growing. A relatively strong Australian dollar has pressured returns from wine exports.

Includes PSD Changes: Yes
Includes Trade Matrix: Yes
Annual Report
Canberra [AS1]
[AS]

Table of Contents

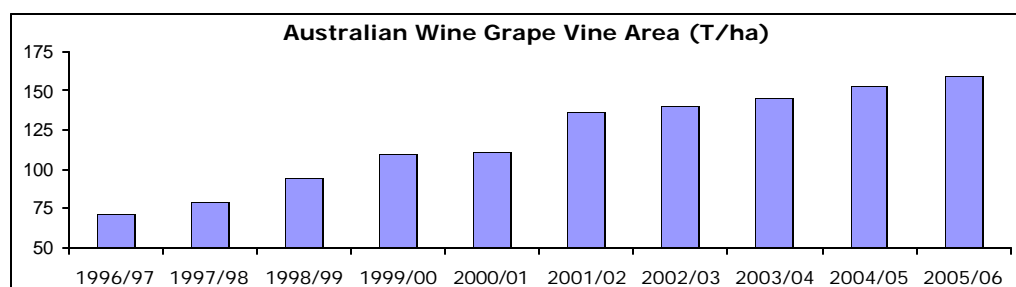
SECTION ONE: SITUATION AND OUTLOOK.....	3
General	3
Weather Conditions.....	4
Production.....	4
Exports.....	5
Imports	5
Domestic Consumption	6
Stocks	6
Policy.....	6
Marketing	7
Industry Developments.....	7
SECTION TWO: STATISTICAL TABLES	8
PSD TABLE	8
PROJECTED WINE GRAPE PRODUCTION, BY CATEGORY	9
DOMESTIC WINE SALES & IMPORTS, BY TYPE.....	10
IMPORTS BY COUNTRY OF ORIGIN.....	11
EXPORTS BY DESTINATION	15

SECTION ONE: SITUATION AND OUTLOOK

General

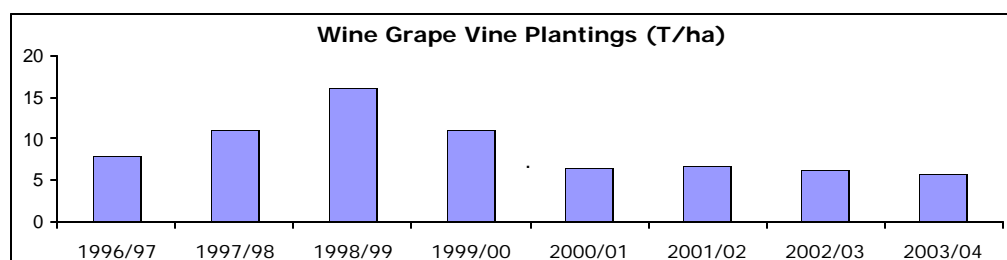
The Australian wine industry has experienced phenomenal growth over the past decade, relative to most other Australian agricultural industries. Historical ABARE figures show wine production increased from 539 TMT in 1990/91 to more than 1,800 TMT in 2003/04. Exports have also increased rapidly over this time with industry figures showing exports reaching A\$2.54 billion in 2003/04, up from A\$0.2 billion in 1991/92. Export value is projected by ABARE to reach A\$3.1 billion in 2004/05.

High levels of investment and rapid expansion in plantings have principally driven increased production and exports. Historical data shows the area planted to wine grapes increasing from 63,000 hectares in 1991/92 to 146,000 hectares in 2003/04, with most of this expansion taking place in the late 1990's. The Australian wine industry expanded so quickly during this time that by 1999/2000 it was rumored that over 50 percent of Australia's grapes vines had yet to reach harvesting maturity.



Source: ABARE data (July-June).

Increased supplies of wine grapes, together with competitive export markets, has seen wine prices fall significantly in recent times. As a result, plantings of wine grapes have been falling steadily since the peak reached in 1998/99. Furthermore, reports indicate significant amounts of older non-premium plantings have been removed.



Source: ABARE data (July-June).

Australian Bureau of Agriculture and Resource Economic's (ABARE) long-term projections have wine grape plantings at around 4,000 hectares per annum out to 2009/10, well below the long-term average. Post anticipates total wine grape production to continue to increase out to 2009/10, albeit at a slower rate than the previous decade.

The Australian dollar has strengthened significantly against the U.S. dollar in recent years, although it is now below its peak earlier in 2005. The Australian dollar, which is now trading

at about US\$0.76, traded at an average of US\$0.74 in 2004, US\$0.65 in 2003, US\$0.56 in 2002, and US\$0.51 in 2001.

Note: Graphs presented in this report are for historical reference only. Figures used in these graphs are not necessarily the same as those used in Post's PSD tables. This is particularly true for the forecast year, where figures may diverge more significantly from Post's figures.

Weather Conditions

The Australian continent has been plagued by widespread drought conditions since 2002/03. A return to more normal weather conditions in 2003/04 led many to believe that the drought conditions were breaking down. However, a return to drought conditions in the second half of 2004/05, notably in eastern Australia, has now created the third longest intermittent drought period in Australia's recorded history.

Much of the Australian wine grape crop is grown under irrigation. Wine grape production remains one of the highest valued industries currently competing for irrigation water, yet it accounts for only minimal amounts of total irrigation water allocation. Post anticipates that drought conditions and reduced levels of irrigation water allocations are likely to only partially constrain wine grape production, unlike larger production declines that may occur to Australia's lower-valued broad-acre irrigated crops.

Production

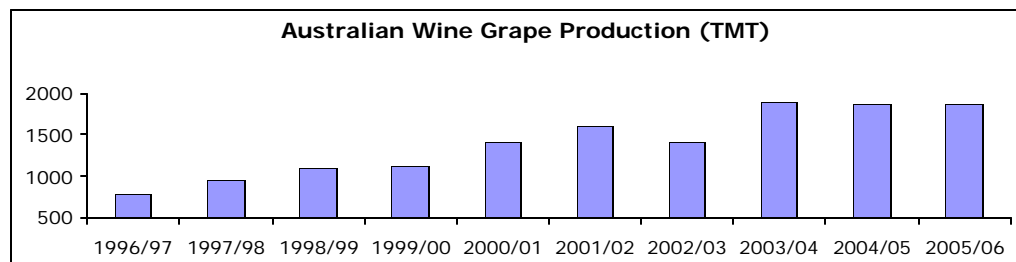
Wine Grape Production

Australian wine grape production is forecast at 1,829 TMT in 2005/06, up only slightly from the revised estimate for the previous year. Dry conditions and a decline in new plantings in the lead-up to the 2005/06 season, together with a general decline in the use of multi-purpose grapes for winemaking, is likely to constrain production to only a slight increase. This figure is in line with the slight increase currently forecast by ABARE.

Wine grape production is estimated at 1,820 TMT in 2004/05, down slightly on Post's previous estimate and in line with industry figures. Dry conditions toward the end of the 2004/05 growing season constrained actual production to just below previous expectations.

Wine grape production for 2003/04 has been revised upwards slightly to 1,840 TMT in line with industry figures. The ABARE production number has also been revised upwards, driven by a slight upward revision in planted area.

All the production growth is coming from white wine grapes. For example, white wine grape production is projected to increase 3.7 percent in 2004/05, while red wine grape production is expected to decline by 6.6 percent.



Source: ABARE data (July-June)

Wine Production

Wine production is forecast at 12.8 million hectoliters (MHL) in 2005/06, up slightly on the revised figures for the previous year and just under the record of 12.88 MHL achieved in 2003/04. Post uses a conversion factor of 0.7 to convert wine grape production to wine production.

Wine production in 2004/05 has been revised downwards to 12.7 MHL, in line with the downward revision in wine grape production. A fall in wine prices has seen some multi-purpose grapes diverted away from wine making. This diversion was the principle driver in the modest fall in the total wine grape supply, despite multipurpose wine grapes being only a minor contributor to total production.

Post has revised wine production in 2003/04 upwards slightly to 12.9 MHL, in line with the slight upward revision in total wine grape production.

Exports

Total wine exports for 2005/06 are forecast at 7.6 MHL, up 14 percent on the previous year and in line with rise projected by ABARE. Industry and government sources expect previous strong demand in key export markets to continue through 2005/06.

Estimated wine exports in 2004/05 have been revised downwards slightly to 6.66 MHL. This represents an increase of 14 percent on the previous year and is in line with year-to-date (July-March) Australian Bureau of Statistics (ABS), which show an increase of 14 percent on the same period for the previous year.

Post has revised the 2003/04 export figure upwards slightly to 5.85 MHL, in line with official ABS data.

Red wine exports increased 25 percent in 2004, while white wine exports increased 13 percent.



Source: ABARE data (July-June).

Imports

Imports are forecast at 230,000 HL (230 THL) in 2005/06, largely unchanged from the revised estimate for the previous year. Despite imports remaining unchanged, this figure represents an historically high import level.

Imports for 2004/05 are estimated at 231 THL, up over seven percent on the previous year and up on the figure in Post's previous report. This increase is in line with year-to-date figures for 2004/05.

Imports for 2003/04 have been revised upwards slightly to 187 THL, in line with official ABS figures.

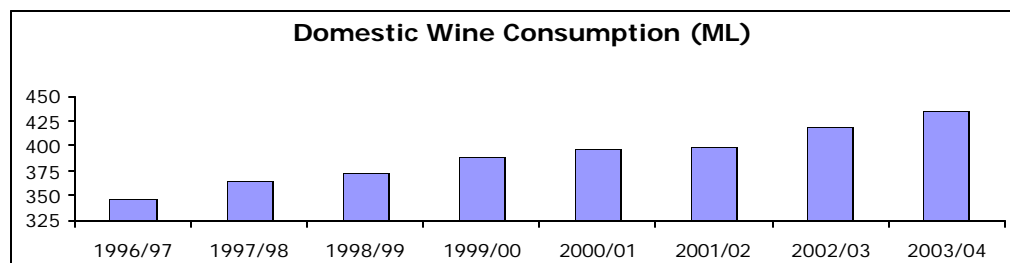
Domestic Consumption

Domestic wine consumption in 2005/06 is forecast at 4.7 MHL, up slightly on the revised figure for the previous year. Strong economic growth and lifestyle changes in recent times is likely to see wine consumption continue to increase over the medium term. Lower prices for wine have also aided the higher consumption levels.

Consumption is estimated at 4.56 MHL in 2004/05, up on the revised figure for the previous year and under the previous figure reported by post. The 2003/04 figure has also been revised downward to 4.36 MHL, in line with ABARE figures.

Official ABS figures for domestic consumption are not available. Post uses ABARE's domestic wine sales data to determine domestic consumption. Post believes this to be relatively accurate in determining domestic consumption.

White wine and sparkling wine varieties outstripped red wine consumption in 2003/04. White wine consumption increased 3.1 percent; sparkling wine rose 9.8 percent; and carbonated wine consumption increased 25 percent from the previous year. In comparison, red wine consumption increased 2.9 percent.



Source: ABARE data (July-June).

Stocks

Ending stocks in 2005/06 are forecast at 15.8 MHL, up five percent from the previous year. Post estimates ending stocks for 2004/05 at 15.1 MHL, up 13 percent from the revised figure for the previous year.

Ending stock figures have increased dramatically in recent years. Industry sources remain concerned at the sustainability of ever increasing stock levels. However, a recent industry report stated that these fears are now subsiding with new planting and subsequent production increases slowing, while export demand continues to build. It is expected that these two factors are likely to ease the stocks situation over time.

Policy

Australia is a strong supporter of reforms in the multilateral trading system and an active participant in the World Trade Organization. Until recently, Australia had not entered into bilateral free trade agreements, aside from the 'Closer Economic Relationship' (CER) trade agreement with New Zealand. More recently, however, this has changed markedly, with the implementation of bilateral free trade agreements (FTAs) with Singapore (2003) and Thailand and the United States (2005), and additional bilateral and regional FTAs being

negotiated or otherwise pursued with Japan, Malaysia, the Association of Southeast Asian Nations, China, and the United Arab Emirates.

Marketing

The AWBC is responsible for export regulation compliance, the promotion of Australian wine (domestically and internationally), maintaining the integrity of Australia's wine labels and wine making practices, defining the boundaries of Australia's wine areas, and addressing international market access issues on behalf of the industry. The GWRDC is responsible for investing in grape and wine research and development.

The AWBC is primarily funded by statutory levies. Levy payers are comprised of wine and brandy producers, who pay the Winegrape Levy, and wine and brandy exporters, who pay the Wine Export Charge. The Winegrape Levy is payable on the quantity of grapes used by the winemaker. The Wine Export Charge is payable by licensed wine exporters based on the FOB value of their wine exports.

The Australian Wine Export Council (AWEC), a subsidiary of AWBC, is the export promotion arm of AWBC. AWEC is made up of Australia's wine producing companies, licensed exporters and members of the AWBC board.

In May 2005 the AWEC launched the "open your mind to Australian wine" international marketing campaign, which aims to showcase the quality and diversity of Australian wine. The first international rollout of this campaign was the "London International Wine and Spirits Fair" on May 17-19, 2005.

Industry Developments

The Australian wine industry continues to undergo major consolidation. In 2005, the most significant development was the Fosters Group's merger with Southcorp Wines. Foster's Wine Estates is now reportedly the world's largest premium wine company. Reportedly, the combined businesses will produce about 36 million cases of wine worth A\$2.6 billion annually, and will account for more than 40 percent of Australia's wine exports by value. The new group includes 20 wineries and dozens of wine brands, including Lindemans, Penfolds, Wynns, Rosemount, and Wolf Blass.

SECTION TWO: STATISTICAL TABLES

PSD TABLE Wine							
	2003	Revised	2004	Estimate	2005	Forecast	UOM
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	
Market Year Begin		07/2003		07/2004		07/2005	MM/YYYY
TOTAL Grape Crush	1793	1840	0	1820	0	1829	(1000 MT)
Begin Stock (Ctrl App)	0	0	0	0	0	0	(1000 HL)
Begin Stock (Other)	0	0	0	0	0	0	(1000 HL)
TOTAL Beginning Stocks	10483	10485	12349	13346	0	15093	(1000 HL)
Prod. from Wine Grapes	11822	12030	0	12070	0	12130	(1000 HL)
Prod. from Tabl Grapes	728	850	0	670	0	670	(1000 HL)
TOTAL PRODUCTION	12550	12880	0	12740	0	12800	(1000 HL)
Intra-EU Imports	0	0	0	0	0	0	(1000 HL)
Other Imports	146	187	0	231	0	230	(1000 HL)
TOTAL Imports	146	187	0	231	0	230	(1000 HL)
TOTAL SUPPLY	23179	23552	12349	26317	0	28123	(1000 HL)
Intra-EU Exports	0	0	0	0	0	0	(1000 HL)
Other Exports	6130	5846	0	6664	0	7600	(1000 HL)
TOTAL Exports	6130	5846	0	6664	0	7600	(1000 HL)
Dom.Consump(Cntrl App)	0	0	0	0	0	0	(1000 HL)
Dom.Consump(Other)	4700	4360	0	4560	0	4700	(1000 HL)
TOTAL Dom.Consumption	4700	4360	0	4560	0	4700	(1000 HL)
End Stocks (Cntrl App)	0	0	0	0	0	0	(1000 HL)
End Stocks (Other)	12349	13346	0	15093	0	15823	(1000 HL)
TOTAL Ending Stocks	12349	13346	0	15093	0	15823	(1000 HL)
TOTAL DISTRIBUTION	23179	23552	0	26317	0	28123	(1000 HL)

PROJECTED WINE GRAPE PRODUCTION, BY CATEGORY (METRIC TONS)				
	Estimated intake	Projected production		
	2003/04	2004/05	2005/06	2006/07
White Wine Grapes				
Premium (a)	636,000	659,000	690,000	724,000
Non-premium (b)	13,000	14,000	13,000	13,000
TOTAL	649,000	673,000	703,000	737,000
Red Wine Grapes				
Premium (c)	1,022,000	950,000	958,000	974,000
Non-premium (d)	38,000	40,000	40,000	41,000
TOTAL	1,060,000	990,000	998,000	1,015,000
Multipurpose grapes for wine making (e)	119,000	95,000	95,000	93,000
Other (f)	67,000	75,000	82,000	88,000
Total grapes for wine making	1,895,000	1,834,000	1,879,000	1,933,000

Source: ABARE

DOMESTIC WINE SALES & IMPORTS, BY TYPE (HL)					
	1999/00	2000/01	2001/02	2002/03	2003/04
DOMESTIC SALES OF AUSTRALIAN WINE					
Table wine	3,071,000	3,246,000	3,296,000	3,445,000	3,550,000
<i>Dry red and rose</i>	1,141,000	1,256,000	1,301,000	1,428,000	1,470,000
<i>Dry white and sweet</i>	1,930,000	1,990,000	1,995,000	2,016,000	2,080,000
Sparkling wine	326,000	307,000	294,000	316,000	347,000
<i>Bottle-fermented</i>	182,000	167,000	174,000	229,000	216,000
<i>Bulk</i>	144,000	140,000	120,000	86,000	131,000
Carbonated wine	35,000	33,000	31,000	28,000	35,000
Total unfortified wine	3,432,000	3,585,000	3,621,000	3,789,000	3,932,000
Fortified wine	230,000	222,000	204,000	208,000	212,000
Other wine, inc. Vermouth	31,000	34,000	28,000	27,000	30,000
TOTAL	3,693,000	3,841,000	3,853,000	4,025,000	4,174,000
WINE IMPORTS					
Table wine	141,000	81,000	92,000	111,000	118,000
Sparkling wine	38,000	29,000	33,000	39,000	48,000
Fortified wine	7,000	1,000	2,000	2,000	7,000
Other	10,000	16,000	18,000	20,000	16,000
Total	196,000	128,000	145,000	171,000	188,000
Total wine available for consumption	3,889,000	3,969,000	3,998,000	4,196,000	4,362,000

Source: ABARE

IMPORTS BY COUNTRY OF ORIGIN (HL &A\$'000)						
Champagne						
	2002		2003		2004	
	<i>Volume</i>	<i>Value</i>	<i>Volume</i>	<i>Value</i>	<i>Volume</i>	<i>Value</i>
France	14,321	36,287	17,313	47,954	19,582	50,981
Italy	10,324	8,357	11,098	7,689	12,653	8,234
New Zealand	5,705	6,534	6,901	6,001	5,903	4,909
Spain	1,590	843	1,685	832	2,742	1,271
Chile	653	315	685	226	1,536	364
Germany	195	141	92	70	958	405
Singapore	1	3	0	0	61	221
Israel	0	1	0	0	31	11
South Africa	13	8	24	13	28	17
Netherlands	0	0	0	0	11	48
United States	6	4	1	7	1	3
Other	30	279	174	522	261	590
Total	32,838	52,772	37,973	63,314	43,767	67,054
Sparkling Wine						
	2002		2003		2004	
	<i>Volume</i>	<i>Value</i>	<i>Volume</i>	<i>Value</i>	<i>Volume</i>	<i>Value</i>
Italy	2,814	1,126	5,980	2,308	7,083	2,697
France	534	1,030	1,031	691	1,010	688
New Zealand	227	406	335	473	618	731
Spain	754	438	737	322	401	174
Germany	101	39	87	44	313	139
United Arab Emirates	0	0	1	0	104	0
Israel	61	45	5	4	5	3
Malaysia	1	6	0	0	1	122
South Africa	76	44	0	0	1	1
Canada	0	4	0	3	1	3
United States	909	49	6	5	0	1
Other	132	140	47	44	0	238
Total	5,609	3,327	8,229	3,894	9,537	4,797

Table Wine						
	2002		2003		2004	
	<i>Volume</i>	<i>Value</i>	<i>Volume</i>	<i>Value</i>	<i>Volume</i>	<i>Value</i>
New Zealand	35,839	33,740	39,877	37,522	71,385	61,992
Italy	23,194	10,450	19,673	9,264	20,286	9,713
France	15,763	15,809	11,907	16,289	14,141	17,379
Portugal	4,176	1,608	5,591	1,837	5,600	1,819
Spain	1,960	974	2,127	1,193	2,562	1,514
Germany	3,047	1,502	2,677	1,578	2,247	1,311
Greece	1,475	376	2,089	586	2,038	629
Chile	957	431	1,064	494	2,024	750
Argentina	81	37	89	48	1,459	378
South Africa	1,394	693	1,844	594	1,455	639
United States	699	769	756	695	1,190	993
Other	4,372	2,391	4,460	3,815	4,987	3,522
Total	92,957	68,780	92,154	73,915	129,374	100,639
Fortified Wine (incl Sherry, Port, Muscat, Dessert Wine)						
	2002		2003		2004	
	<i>Volume</i>	<i>Value</i>	<i>Volume</i>	<i>Value</i>	<i>Volume</i>	<i>Value</i>
Spain	564	519	740	686	505	402
Chile	0	0	0	0	176	10
Cyprus	32	21	263	161	153	95
United Kingdom	29	33	31	34	140	116
France	19	44	19	29	100	310
Italy	1	2	0	0	83	56
Portugal	56	114	95	147	60	97
Moldova	0	0	0	0	4	1
New Zealand	0	0	131	148	1	6
Israel	0	0	0	0	1	1
United States	0	0	0	0	0	0
Other	107	14	192	55	3	2
Total	808	747	1,471	1,260	1,226	1,096

Vermouth						
	2002		2003		2004	
	<i>Volume</i>	<i>Value</i>	<i>Volume</i>	<i>Value</i>	<i>Volume</i>	<i>Value</i>
Italy	5,191	2,126	4,880	1,748	5,039	1,952
New Zealand	5,719	4,111	893	210	1,769	1,109
Greece	455	96	443	89	351	71
France	589	331	329	223	240	148
Chile	0	0	9	2	165	63
Germany	178	91	52	24	92	48
Croatia	82	31	81	28	74	25
Argentina	0	0	0	0	1	0
United Arab Emirates	0	0	0	0	0	0
Portugal	1	1	0	0	0	0
United States	1	1	0	0	0	0
Other	1	1	1	16	7	23
Total	12,217	6,789	6,688	2,340	7,738	3,439
Other (incl Grape Must)						
	2002		2003		2004	
	<i>Volume</i>	<i>Value</i>	<i>Volume</i>	<i>Value</i>	<i>Volume</i>	<i>Value</i>
New Zealand	204	237	453	551	1,914	1,173
Italy	1,900	674	359	155	1,264	338
Portugal	630	324	188	107	236	113
Chile	132	54	0	0	219	88
France	128	60	42	54	128	176
United States	164	103	206	119	114	160
Macedonia	160	33	168	37	81	29
Spain	95	47	60	55	66	36
Greece	874	258	312	96	48	13
United Kingdom	1	10	0	8	15	110
Other	143	89	378	342	35	29
Total	4,431	1,889	2,166	1,524	4,120	2,265

Fermented Beverages (2206)						
	2002		2003		2004	
	<i>Volume</i>	<i>Value</i>	<i>Volume</i>	<i>Value</i>	<i>Volume</i>	<i>Value</i>
United Kingdom	43,482	25	34,999	36	40,778	54
Germany	998	235	1,878	316	3,170	282
Japan	1,204	541	2,411	592	2,897	626
Jamaica	0	0	0	0	1,082	0
Ireland	4	0	0	0	721	238
China	426	107	454	71	718	138
Netherlands	0	0	0	0	337	0
Ukraine	0	0	0	0	289	0
Korea South	359	41	162	53	265	46
New Zealand	126	22	6	2	186	18
United States	105	8	16	6	60	4
Other	2,264	17,453	4,059	9,079	600	9,896
Total	48,968	18,432	43,985	10,155	51,103	11,302
Total Wine Imports						
	2002		2003		2004	
	<i>Volume</i>	<i>Value</i>	<i>Volume</i>	<i>Value</i>	<i>Volume</i>	<i>Value</i>
New Zealand	47,835	45,094	48,678	44,916	82,260	70,348
Italy	46,371	23,836	44,974	22,246	48,714	23,757
France	31,525	53,610	31,131	65,395	35,645	69,804
United States	1,898	996	11,640	2,221	24,364	3,532
Spain	5,070	2,847	5,354	3,087	6,276	3,397
Portugal	4,862	2,046	5,873	2,091	5,896	2,028
Chile	1,742	799	1,764	724	4,132	1,283
Germany	4,193	2,128	3,486	1,976	3,908	2,045
Greece	3,517	854	3,267	853	2,774	774
South Africa	1,525	786	1,912	628	1,498	676
Other	25,980	8,993	6,206	5,791	8,035	6,515
Total	174,518	141,989	164,285	149,928	223,502	184,159

EXPORTS BY DESTINATION (HL &A\$'000)						
White Wine						
	2002		2003		2004	
	<i>Volume</i>	<i>Value</i>	<i>Volume</i>	<i>Value</i>	<i>Volume</i>	<i>Value</i>
United Kingdom	1,001,061	388,312	920,380	337,688	1,060,134	378,061
United States	392,389	218,897	504,726	221,483	574,510	238,685
Canada	64,450	34,335	75,462	41,285	100,145	48,368
New Zealand	101,087	23,319	115,475	28,620	79,118	25,433
Germany	49,916	15,699	57,229	14,294	74,594	18,765
Netherlands	45,245	15,802	62,046	19,573	58,189	18,574
Ireland	38,645	19,827	34,339	16,833	43,991	21,081
Sweden	30,265	11,953	23,970	9,769	27,259	10,564
France	18,055	4,941	22,603	5,956	26,420	5,610
Belgium	0	0	8,768	3,339	24,819	8,702
Other	136,619	60,931	133,468	59,390	139,079	63,504
Total	1,877,732	794,016	1,958,466	758,230	2,208,258	837,347
Red Wine (incl Rose)						
	2002		2003		2004	
	<i>Volume</i>	<i>Value</i>	<i>Volume</i>	<i>Value</i>	<i>Volume</i>	<i>Value</i>
United Kingdom	1,110,784	496,247	1,056,782	427,232	1,423,480	552,392
United States	783,325	535,578	1,111,626	605,279	1,283,207	645,762
Canada	140,868	106,227	198,058	141,028	286,589	170,954
Germany	89,008	35,640	172,994	44,479	208,115	53,430
New Zealand	143,597	59,802	193,386	61,039	143,532	58,983
Denmark	64,158	23,125	90,581	26,292	125,261	33,937
Netherlands	57,241	24,160	72,261	24,287	90,494	29,301
Sweden	31,460	14,848	55,618	22,147	65,702	23,853
Ireland	48,028	28,201	45,781	25,943	65,134	33,351
Japan	31,469	18,591	34,554	21,684	53,173	28,913
Other	213,973	126,470	249,729	131,146	363,776	166,954
Total	2,713,911	1,468,889	3,281,370	1,530,556	4,108,463	1,797,830

Champagne						
	2002		2003		2004	
	<i>Volume</i>	<i>Value</i>	<i>Volume</i>	<i>Value</i>	<i>Volume</i>	<i>Value</i>
United Kingdom	30,190	18,859	37,606	21,526	41,180	23,456
New Zealand	12,118	7,066	11,896	7,228	11,286	7,185
United States	1,493	1,690	1,556	1,430	5,648	3,548
Sweden	2,192	1,064	2,459	1,154	2,650	1,318
Japan	1,636	1,219	2,208	1,456	2,596	1,718
Ireland	1,145	733	1,325	802	1,880	1,261
Canada	494	350	1,020	689	938	637
Norway	621	251	643	311	888	447
United Arab Emirates	239	130	337	152	582	254
Fiji	489	461	489	467	527	465
Other	3,614	2,329	4,495	2,887	4,622	3,486
Total	54,231	34,152	64,034	38,102	72,797	43,775
Other Sparkling Wine						
	2002		2003		2004	
	<i>Volume</i>	<i>Value</i>	<i>Volume</i>	<i>Value</i>	<i>Volume</i>	<i>Value</i>
United Kingdom	8,324	4,359	11,202	5,159	18,066	8,937
New Zealand	4,605	1,761	6,118	2,329	8,495	2,903
United States	4,646	3,825	3,214	2,388	3,636	2,435
Canada	2,206	1,497	1,549	958	2,510	1,479
Japan	2,725	1,430	2,049	1,204	2,161	1,545
Denmark	2	11	8	9	1,043	501
Malaysia	65	92	129	106	819	303
Hong Kong	173	157	120	135	590	325
Netherlands	100	52	457	253	509	274
Fiji	327	168	673	287	475	330
Other	3,459	1,992	3,172	1,904	4,099	2,427
Total	26,632	15,344	28,691	14,732	42,403	21,459

Fortified Wine (incl Sherry, Port, Muscat, Dessert Wine)						
	2002		2003		2004	
	<i>Volume</i>	<i>Value</i>	<i>Volume</i>	<i>Value</i>	<i>Volume</i>	<i>Value</i>
United States	4,895	5,401	5,048	5,211	5,808	5,184
United Kingdom	18,029	9,014	8,476	4,086	5,546	1,849
Canada	4,716	1,871	4,626	1,884	4,466	1,949
New Zealand	2,552	1,465	2,261	1,252	2,261	1,339
Thailand	399	86	738	155	583	124
Hong Kong	60	56	100	366	370	71
Malaysia	305	188	298	138	312	214
Solomon Islands	154	58	129	48	250	53
Japan	315	311	203	142	256	203
Papua New Guinea	97	42	206	84	220	33
Other	2,981	1,979	2,120	1,660	1,122	1,148
Total	34,503	20,471	24,205	15,026	21,194	12,167
Vermouth						
	2002		2003		2004	
	<i>Volume</i>	<i>Value</i>	<i>Volume</i>	<i>Value</i>	<i>Volume</i>	<i>Value</i>
New Zealand	1,088	622	1,089	552	1,006	540
Malaysia	126	48	207	78	143	49
United Kingdom	0	0	0	0	90	27
Singapore	93	48	193	71	49	21
Taiwan	0	0	0	0	31	44
Fiji	0	0	0	0	11	13
East Timor	1	1	0	0	8	5
Hong Kong	20	2	8	3	8	7
Germany	8	2	0	0	7	6
Korea South	0	0	0	0	3	4
United States	76	82	0	0	3	3
Other	29	32	16	14	15	5
Total	1,441	837	1,513	718	1,374	724

Other (incl Grape Must)						
	2002		2003		2004	
	<i>Volume</i>	<i>Value</i>	<i>Volume</i>	<i>Value</i>	<i>Volume</i>	<i>Value</i>
United States	1,573	2,032	1,815	1,380	983	447
Denmark	0	0	209	51	772	199
Malaysia	298	396	608	324	568	453
New Zealand	1,274	816	3,312	1,179	558	364
Singapore	551	582	343	494	423	408
China	225	122	105	61	362	357
Japan	983	779	837	791	329	324
United Kingdom	289	122	184	158	311	227
Canada	434	344	79	59	267	124
Taiwan	12	23	42	78	232	318
Other	2,310	1,214	1,434	986	875	944
Total	7,949	6,430	8,968	5,561	5,680	4,165
Fermented Beverages (2206)						
	2002		2003		2004	
	<i>Volume</i>	<i>Value</i>	<i>Volume</i>	<i>Value</i>	<i>Volume</i>	<i>Value</i>
Japan	79,302	19,165	59,373	15,061	36,445	9,590
New Zealand	102	84	1,888	595	1,841	538
Singapore	2,489	807	2,536	711	1,554	412
Taiwan	271	72	1,100	273	775	164
Hong Kong	1,570	329	916	217	501	110
Finland	606	130	0	0	437	77
Canada	187	71	558	225	171	61
Tuvalu	0	0	0	0	149	11
Malaysia	423	102	130	51	147	41
Korea South	1,995	373	1,619	297	83	18
United States	210	1	3	2	0	0
Other	8,858	2,861	6,121	215	144	41
Total	96,013	23,995	74,244	17,647	42,247	11,063

Total Wine Exports						
	2002		2003		2004	
	<i>Volume</i>	<i>Value</i>	<i>Volume</i>	<i>Value</i>	<i>Volume</i>	<i>Value</i>
United Kingdom	2,168,677	916,911	2,034,630	795,849	2,548,807	964,948
United States	1,188,398	767,506	1,627,985	837,171	1,873,795	896,065
Canada	213,196	144,652	280,795	185,903	394,916	223,511
Germany	139,374	51,802	230,456	58,995	282,848	72,378
New Zealand	266,321	94,850	333,538	102,200	246,256	96,746
Denmark	87,338	30,261	116,978	34,997	149,824	42,527
Netherlands	103,017	40,392	135,147	44,413	149,403	48,328
Ireland	88,062	48,920	81,804	43,779	111,640	56,086
Sweden	64,148	28,038	82,098	33,146	95,906	35,941
Japan	55,995	32,031	59,050	35,659	83,263	45,297
Other	341,873	184,775	384,766	190,813	523,511	235,639
Total	4,716,399	2,340,138	5,367,247	2,362,925	6,460,169	2,717,466

Source: World Trade Atlas