Wine Australia

Market Insights

Export Report

12 months to 31 December 2025

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Wine
Australia

Executive summary

- Australian wine exports declined by 8 per cent in value to $2.34 billion and 6 per cent in volume to 613 million litres in the 12 months to December 2025.
- The decline in value was driven by mainland China, as shipments to the market reduced after the initial restocking period post-tariffs. The value of shipments to the United Kingdom and United States also declined.
- The decline in shipments to mainland China was also a contributor in the deterioration in overall export volume, but the United Kingdom had the largest impact, declining 9 per cent in volume to 194 million litres.
- The weakened export performance is consistent with the long-term trend of declining wine consumption in major markets around the world. Consumers are reducing their alcohol consumption in line with wellness trends and to save money during increases to the costs-of-living. Trade barriers and regional conflicts are also making it more difficult and expensive to get product into market.
- In the United Kingdom, shipments valued above $7.50 per litre grew by 15 per cent. The growth was spread across many of the key varieties – including Shiraz, Cabernet Sauvignon, Chardonnay, Grenache and Sauvignon Blanc.
- Exports to the United States declined by 12 per cent in value to $287 million as the total wine market fell below 300 million cases for the first time in two decades. However, volume to the United States increased due to growth in unpackaged wine shipments.
- Shipments to Canada increased by 12 per cent in value to $175 million. Growth came from across the price spectrum of packaged wines as Canadian consumers look to replace American wines with other source countries.
- Value growth was widespread amongst the Asian destinations, with the largest increases coming from Thailand, Malaysia, Indonesia, and Taiwan. However, the important Northeast Asian markets of Japan and South Korea also grew – at slightly lower rates.

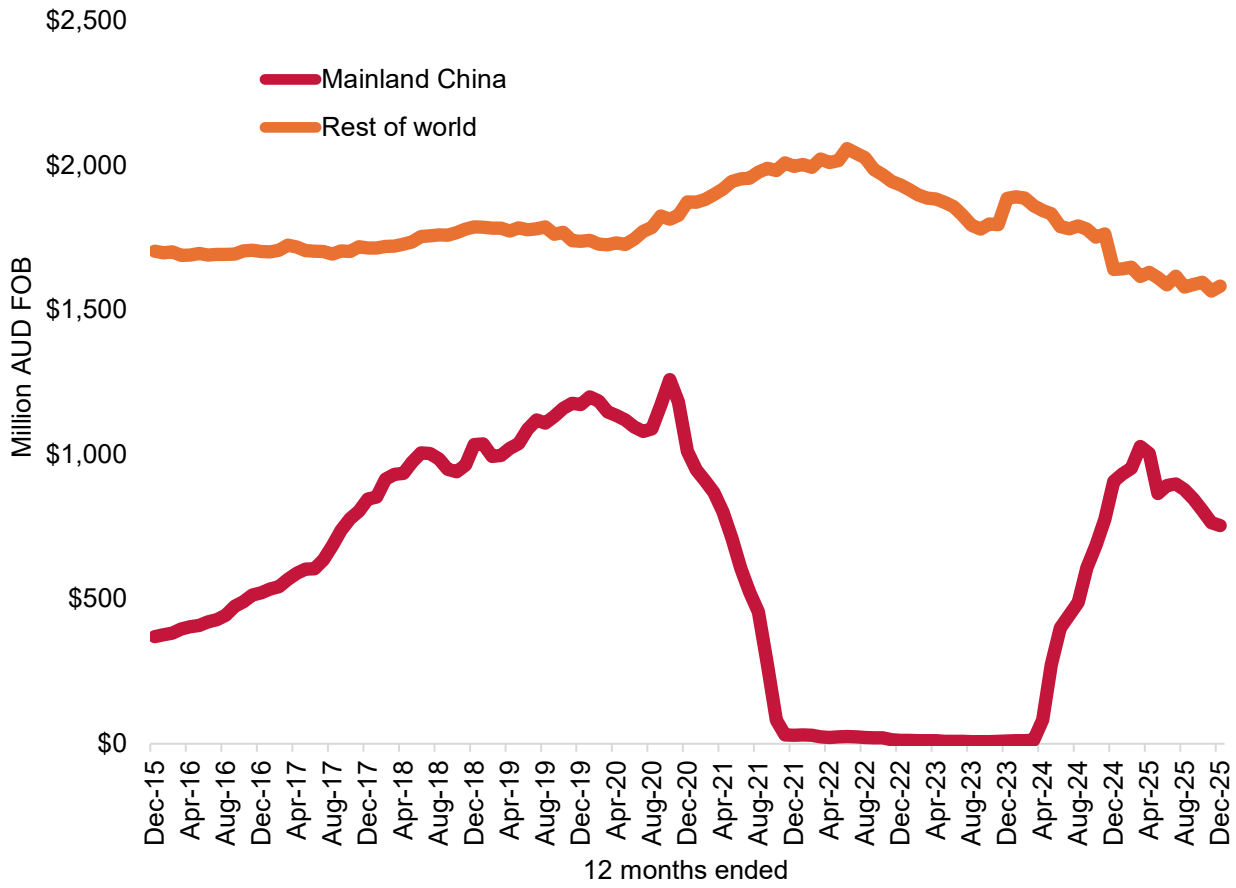
Overview

In the 12 months ended December 2025, Australian wine exports declined by 8 per cent in value to $2.34 billion[1] and 6 per cent in volume to 613 million litres. The average value of exports declined by 3 per cent to $3.81 per litre free on board (FOB)[2].

Exports to mainland China had the biggest impact on value, as shipments to the market declined after the initial restocking period post the removal of import tariffs on Australian wine (see Figure 1). Declining shipment value to the United States (US) and Hong Kong also had a large influence on the overall numbers.

[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.

Figure 1: Value of Australian wine exports, mainland China vs rest of world

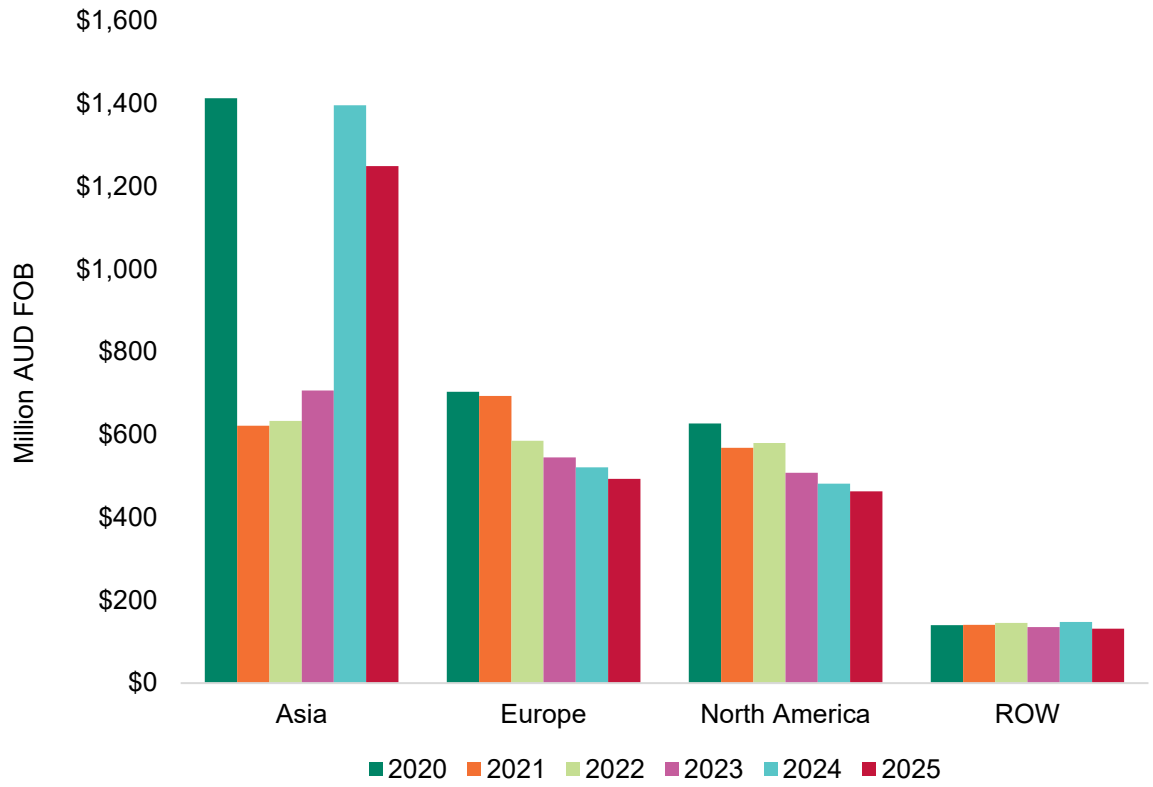


The decline in shipments to mainland China was also a contributor in the deterioration in overall export volume, but the United Kingdom (UK) had the largest impact.

The weakened export performance is consistent with the long-term trend of declining wine consumption in major markets around the world (see Figure 2). Consumers are reducing their alcohol consumption inline with wellness trends and to save money during increases to the costs-of-living. Trade barriers and regional conflicts are also making it more difficult and expensive to get product into market. Many wine exporting countries are suffering similar circumstances – a recent analysis on French exports reported that shipments decreased by 2 per cent in volume in the first nine months of 2025 – driven primarily by the US and mainland China markets[3]. Even France's own tradition of wine drinking is changing – in 1980, 50 per cent of French consumers drank wine daily – that share is now only 10 per cent[4].

[3] France Loses Ground in USA and China | Meininger's International
[4] Ministry of Agriculture and Food, France

Figure 2: Export value by region over time



More than 50 per cent of Australia's export volume goes to the UK and the US. These two wine markets are facing very tough headwinds, including changing consumer habits with preferences away from wine drinking occasions, increased cost-of-living, and major changes in the way wine is taxed.

While the re-opening of the mainland China market at the end of March 2024 provided some temporary relief in the decline in Australian wine exports (see Figure 2), the Chinese wine market is one third of the size it was five years ago – impacting both domestically produced and imported wines. While shipment levels in the first three quarters after tariffs were removed were exceptionally positive, consumer demand has been subdued. Chinese consumer confidence has only made minor improvements since falling to an all-time low in 2022 during the COVID-19 pandemic[5] – negatively impacting on consumer spending. According to IWSR, the mainland China on-premise channel – a key channel for wine consumption – is suffering as a result of cautious consumers. Wine was also a key beverage at business dinners, and these occasions have reduced significantly in the last few years.

While the overall numbers by region are not positive, there are spots of value growth in individual markets – including Canada, Singapore, Thailand, and Malaysia.

Wine Australia's General Manager, Market Development, Paul Turale said, "Australia wine is not immune from the economic, geo-political and wider social trends that continue to adversely impact Australian wine's export performance. Our objective remains steadfast – to work with all sector stakeholders to keep turning up and find innovative ways to demonstrate the quality, diversity and value of Australian wine at all price points. We continue to invest in markets of opportunity, acknowledging that this investment will likely take time to deliver the sustainable, commercial outcomes we're striving for."

[5] National Bureau of Statistics China

Container type

Unpackaged wine exports (to be packaged in market) declined by 1 per cent in value to $480 million and 3 per cent in volume to 416 million litres. The average value of unpackaged wine increased by 2 per cent to $1.15 per litre FOB. The decline of unpackaged wine shipments to mainland China was the main driver of the decrease in value, while declining shipments to the UK drove the decrease in volume. Growth in unpackaged shipments to the US offset some of this decline.

Packaged wine exports (most of which are in glass bottle) declined by 10 per cent in value to $1.86 billion and 11 per cent in volume to 196 million litres. The average value of packaged wine grew by 1 per cent to $9.46 per litre FOB. Mainland China, Hong Kong, and the US were the main drivers of this decline.

Price point

Australian wine exports with an average value below $5 per litre declined by 8 per cent in value to $899 million and 5 per cent in volume to 531 million litres.

Figure 3: Export volume by price segment ($/litre FOB)

	MAT December 2024		MAT December 2025		
Price segment	**Million litres**	**Share of total**	**Million litres**	**% change**	**Share of total**
$2.49 and under	424.8	65.5%	412.5	-2.9%	67.3%
$2.50 to $4.99	137.5	21.2%	119.0	-13.4%	19.4%
Subtotal below $5	*562.3*	*86.7%*	*531.5*	*-5.5%*	*86.7%*
$5.00 to $7.49	37.4	5.8%	35.7	-4.6%	5.8%
$7.50 to $9.99	15.1	2.3%	13.5	-10.7%	2.2%
$10.00 to $14.99	13.5	2.1%	13.5	0.0%	2.2%
$15.00 to $19.99	3.3	0.5%	3.7	11.3%	0.6%
$20.00 to $29.99	5.9	0.9%	4.9	-15.6%	0.8%
$30.00 to $49.99	3.9	0.6%	3.8	-4.5%	0.6%
$50.00 to $99.99	6.4	1.0%	5.3	-17.5%	0.9%
$100.00 to $199.99	0.8	0.1%	0.6	-19.3%	0.1%
$200.00 and over	0.2	0.0%	0.2	13.0%	0.0%
Subtotal $5 and above	*86.5*	*13.3%*	*81.2*	*-6.1%*	*13.3%*
Total	**648.8**	**100.0%**	**612.7**	**-5.6%**	**100.0%**

Exports with an average value of $5 and above also declined – by 9 per cent in value to $1.44 billion and 6 per cent in volume to 81 million litres. However, exports valued between $15 and $19.99 per litre grew by 11 per cent in volume, driven by several markets including the UK, mainland China, Canada, Demark, and Hong Kong.

Wine style

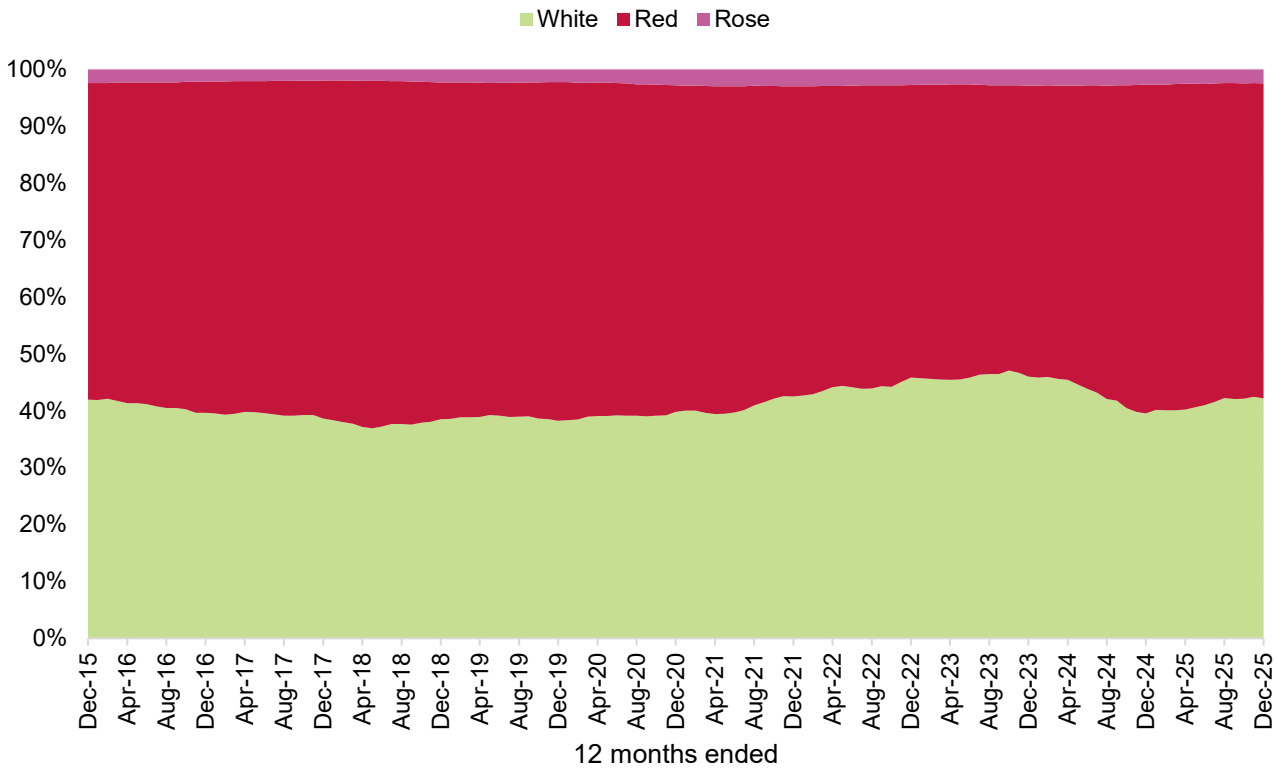
Exports of Australian red wine declined by 10 per cent in value to $1.72 billion and 9 per cent in volume to 339 million litres in the 12 months to December 2025. Red wine's share of exports declined from 58 per cent of volume in 2024 to 55 per cent in 2025 (see Figure 4). The decline in red wine was principally driven by mainland China, Hong Kong, and the US, although some of the decline was offset by growth to Singapore, Canada, Thailand, and Malaysia.

The top five exported varieties in red wine were:

- Shiraz, down 12 per cent to 147 million litres,
- Cabernet Sauvignon, down 4 per cent to 94 million litres,
- Merlot, down 5 per cent to 38 million litres,

- Pinot Noir, down 2 per cent to 5.1 million litres, and
- Petit Verdot, down 31 per cent to 3.3 million litres.

Figure 4: Share of export volume by colour



White wine exports declined by 3 per cent in value to $575 million and increased by 1 per cent in volume to 258 million litres (moving from a 40 per cent volume share to 42 per cent). Increases in the volume of white wine exports to the US, mainland China, and Canada were partially offset by declining volumes to the UK, Germany, and New Zealand.

The top five exported varieties in white wine were:

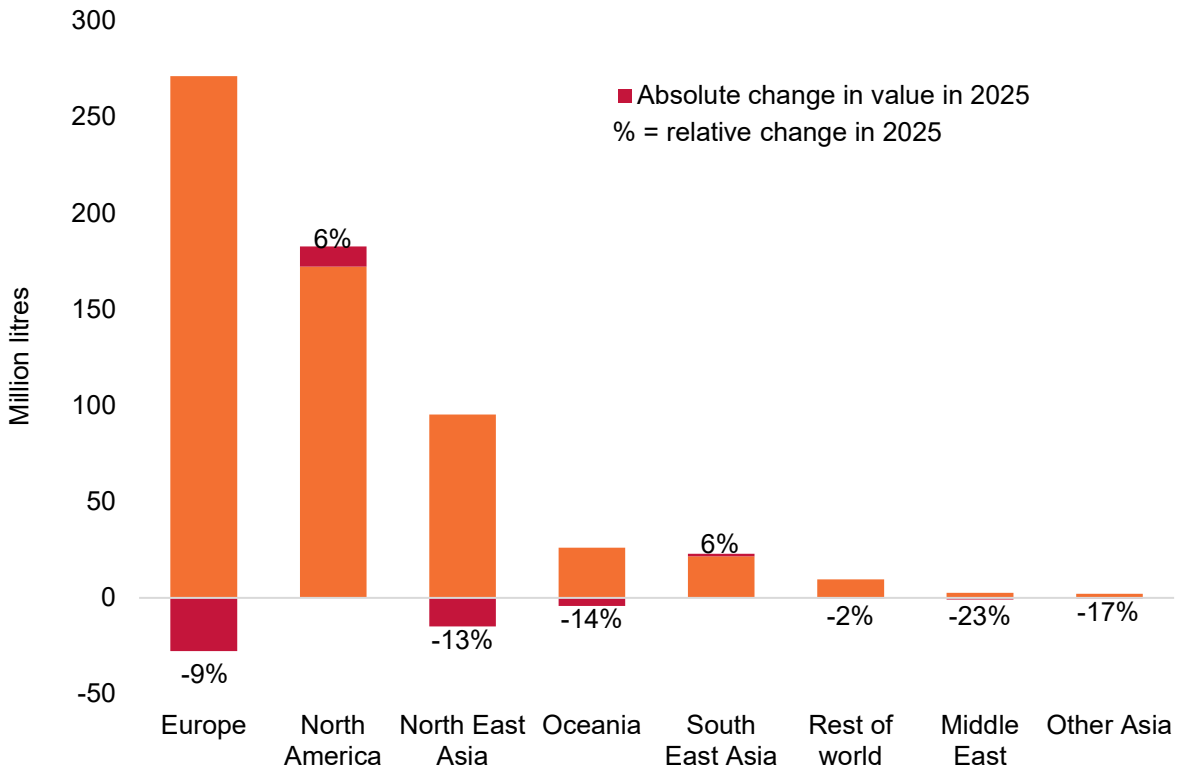
- Chardonnay, down 6 per cent to 128 million litres,
- Pinot Gris/Grigio, up 28 per cent to 52 million litres,
- Sauvignon Blanc, down 4 per cent to 25 million litres,
- Colombard, up 21 per cent to 8.3 million litres, and
- Muscat Gordo Blanco, up 11 per cent to 5.9 million litres.

Exports of rosé declined by 13 per cent in value to $41 million and 13 per cent in volume to 15 million litres – mainly due to a decline in shipments to the UK, Canada, and New Zealand. The style maintained a 2 per cent share of export volume.

Destinations

In the 12 months ended December 2025, Australian exporters shipped wine to 109 different markets, down from 119 in the previous 12 months.

Figure 5: Volume by region



Europe is Australia's largest export region by volume. In the past 12 months, volume declined by 9 per cent to 271 million litres, driven primarily by shipments to the UK and Germany.

North America is the second largest region by volume and showed a recovery in the past 12 months, driven by an increase in unpackaged shipments to the US.

Volume shipped to Northeast Asia declined by 13 per cent to 95 million litres, with mainland China, Japan, and Hong Kong all declining in volume, partially offset by growth to South Korea.

Southeast Asia grew by 6 per cent in volume to 23 million litres, driven by good growth to Thailand and Singapore in the last 12 months.

The top five markets by value were:

- Mainland China, down 17 per cent to $755 million,
- United Kingdom, down 3 per cent to $343 million,
- United States, down 12 per cent to $287 million,
- Canada, up 12 per cent to $175 million, and
- Singapore, up 18 per cent to $118 million.

The top five markets by volume were:

- United Kingdom, down 9 per cent to 194 million litres,
- United States, up 11 per cent to 118 million litres,
- Mainland China, down 18 per cent to 69 million litres,
- Canada, down 2 per cent to 64 million litres, and
- New Zealand, down 13 per cent to 24 million litres.

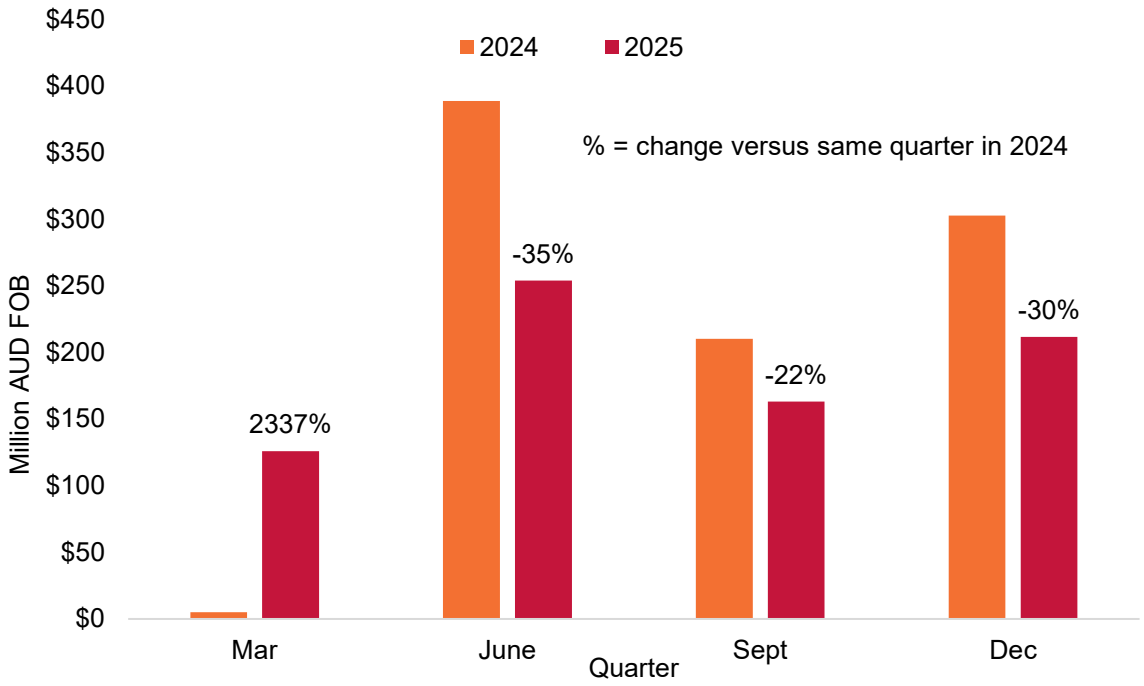
Asia

Mainland China

In the 12 months to December 2025, Australian wine exports to mainland China declined by 17 per cent in value to $755 million and 18 per cent in volume to 69 million litres. The average value remained relatively steady, increasing by 1 per cent to $10.94 per litre FOB.

The year-on-year decline was a result of three consecutive quarters with lower value than the same quarter in 2024 (see Figure 6). The figures represent a normalising of shipment levels after the initial re-stocking period into the market. Chinese consumers are being cautious with their spending, including on alcohol, and are therefore not consuming as much wine as they did prior to the imposition of import tariffs on Australian bottled wine. According to the National Bureau of Statistics of China, consumer confidence was around 90 at the end of 2025, down from levels around 120 pre-COVID-19 and only up slightly from the all-time low of 86 during COVID-19 era lockdowns[6].

Figure 6: Value of exports to mainland China by quarter



Exports of both unpackaged and packaged wine to mainland China declined in the past 12 months. Unpackaged wine exports declined by 19 per cent in volume to 39 million litres (a 56 per cent share of volume) and 36 per cent in value to $41 million (a 5 per cent share of value). The steeper decline in value of unpackaged wine was a result of a drop in the average value by 21 per cent to $1.05 per litre FOB.

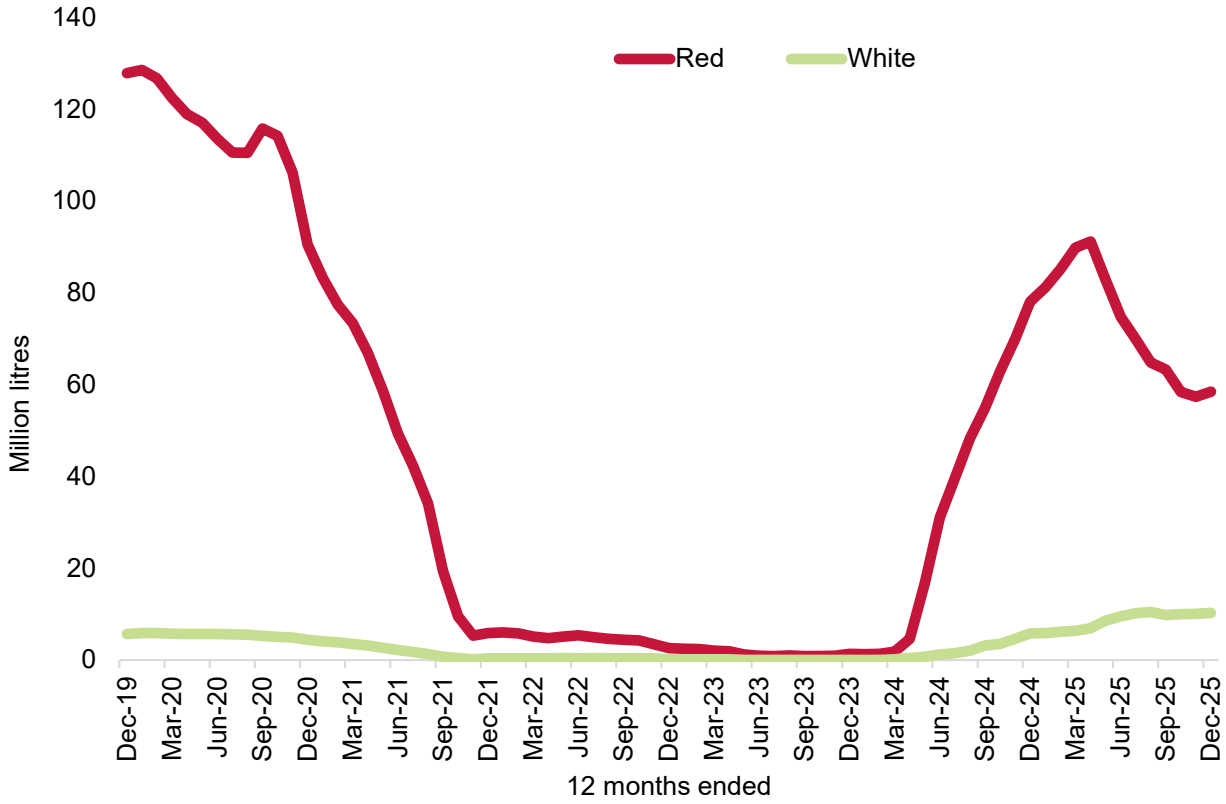
Packaged wine exports declined by 16 per cent in volume to 30 million litres (a 44 per cent volume share) and 15 per cent in value to $714 million (a 95 per cent value share). The average value of packaged wines increased by 1 per cent to $23.58 per litre FOB.

However, there were very different performances by colour in the past 12 months (see Figure 7). Red wine exports declined by 25 per cent in volume to 58 million litres – decreasing from a 93 per cent share of exports in 2024 to 85 per cent. Meanwhile, exports of white wine grew by 77 per cent to 10 million litres, increasing to a 15 per cent share of export volume from 7 per cent. The top three varieties in white wine exports – Chardonnay, Sauvignon Blanc, and Riesling – all grew. The increase in white

[6] Consumer Confidence is an index which measures consumers' sentiment towards the future, with a value above 100 being generally optimistic and a value below 100 generally pessimistic.

wine shipments was also spread across the price spectrum from lower to higher end wines. This is consistent with market trends in mainland China, where consumption occasions are moving from business dinners to more casual occasions where white wine is more suitable, according to IWSR. Sparkling and carbonated exports also increased in volume.

Figure 7: Volume of red and white wine exports to mainland China



Rest of Asia

The Asian region, excluding mainland China, increased by 1 per cent in value to $494 million and 2 per cent in volume to 51 million litres in the 12 months to December 2025. Shipments to Singapore increased by 18 per cent in value to reach $118 million, overtaking Hong Kong for the first time since the 12 months to September 2020. The value of shipments to Hong Kong declined by 36 per cent, reaching the lowest level since late 2020. It should be noted that both markets are trading hubs in the region, therefore some of the wine shipped to these locations is re-exported to other markets. Export performance to these hubs can vary widely depending on business decisions by exporters to ship via a hub or direct to market.

Value growth was widespread amongst the other Asian destinations (see Figure 8), with the largest increases coming from Thailand, Malaysia, Indonesia, and Taiwan. The important Northeast Asian markets of Japan and South Korea also grew at slightly lower rates.

Figure 8: Exports to Asia by destination market (excluding mainland China)

	Volume			Value		
Destination market	**Million litres**	**% change**	**5-year CAGR**	**Million AUD**	**% change**	**5-year CAGR**
Singapore	6.6	12%	3%	$118.3	18%	8%
Hong Kong	7.6	-13%	0%	$109.8	-36%	-4%
Thailand	8.1	8%	19%	$63.0	39%	24%
Malaysia	2.6	-7%	-3%	$51.6	44%	4%
Japan	11.1	-2%	-3%	$46.1	2%	1%
South Korea	5.0	42%	5%	$28.4	3%	1%
Taiwan	2.6	6%	1%	$27.8	15%	8%
Indonesia	0.6	16%	2%	$12.5	92%	-1%
Philippines	2.5	-7%	11%	$11.6	-16%	6%
India	1.6	-23%	2%	$9.3	13%	7%
Vietnam	1.7	-13%	31%	$7.7	18%	18%
Others	1.4	88%	25%	$8.2	61%	20%
Total	**51.4**	**2%**	**3%**	**$494.5**	**1%**	**4%**

Wine Australia's Regional General Manager APAC, Sarah Roberts said, "It is encouraging to see such strong results across the region, despite ongoing global volatility and challenging economic conditions. The data aligns closely with consumption trends we are observing, particularly in markets such as Thailand and China, where there is increasing consumer demand for lighter-style wines. Notably, the strong performance of premium price segments demonstrates that discerning consumers continue to value and invest in high-quality Australian wine, even amid economic pressures. We are uniquely positioned to compete across Asian markets, and we will continue to focus our marketing efforts through 2026 to support exporters in building momentum in emerging markets while strengthening performance in more established ones."

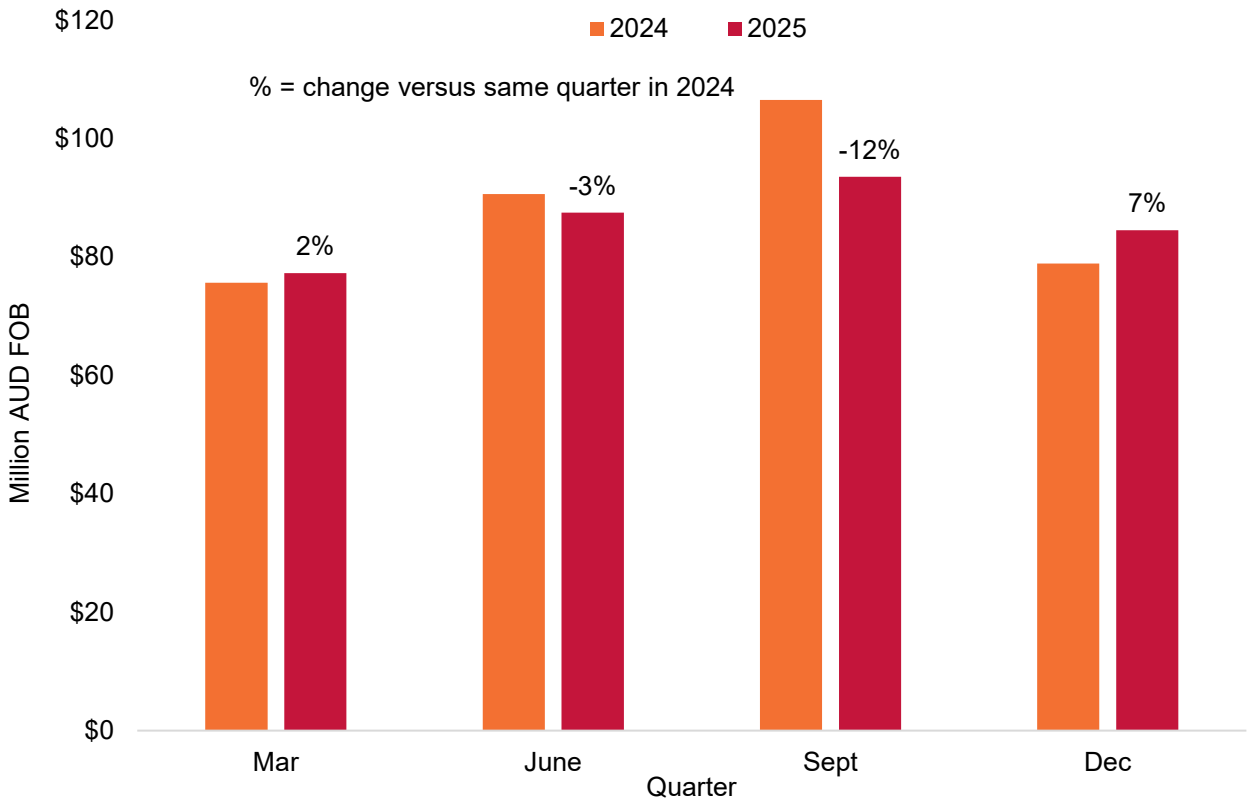
Europe

United Kingdom

In the 12 months to December 2025, Australian wine exports to the UK declined by 3 per cent in value to $343 million and 9 per cent in volume to 194 million litres. The average value of exports increased by 7 per cent to $1.77 per litre FOB.

Although exports to the market declined year-on-year, they finished the December quarter in a stronger position than the previous 12 months – up 7 per cent in value compared to the 2024 December quarter (see Figure 9). This is positive given low consumer confidence, cost of living pressures, and alcohol duty increases. In encouraging news, the number of on-premise outlets remained stable in 2025 after years of closures since COVID-19. Australia remains the number one wine source country in the UK off-premise channel, although both Australian and total wine sales declined in 2025, by 7 and 4 per cent respectively, according to Circana.

Figure 9: Value of exports to the United Kingdom by quarter



Unpackaged wine exports to the UK declined by 8 per cent in volume to 175 million litres (a 91 per cent volume share) but were stable in value at $231 million (a 67 per cent value share). Packaged exports also declined by 18 per cent in volume to 18 million litres and 8 per cent in value to $112 million. The average value of both unpackaged and packaged exports increased by 8 and 12 per cent respectively.

Driving the increase in the average value of packaged exports was an increase in shipments valued above $7.50 per litre. This segment of the market grew by 15 per cent in volume and the growth was spread across many of the key varieties – including Shiraz, Cabernet Sauvignon, Chardonnay, Grenache and Sauvignon Blanc.

Wine Australia's Regional General Manager EMEA, Laura Jewell MW said, "The last quarter of the year has been mixed, with the Chancellor's budget delivering more challenges in terms of increased duty rates from February and business rates which will affect the hospitality sector in particular. On the positive side, we are seeing strong retailer performances across the Christmas trading weeks, with premium own label a strong point for Tesco, Sainsbury's and Marks and Spencer. Competition for shelf space will continue to get tighter as European wines seek alternative markets in the face of tariffs in the USA."

Rest of Europe

Tough market conditions continued across the rest of Europe, with exports to the region (excluding UK) declining by 11 per cent in both volume and value in the 12 months to December 2025.

Many of the destinations in Europe are fully developed and mature wine markets and are therefore facing declining wine consumption. However, it is also 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 the results for individual markets year-on-year.

The heaviest losses were felt in Germany, which declined by 27 per cent in volume – driven entirely by unpackaged exports. However, there was growth in exports to the Netherlands – packaged exports valued between $2.50 and $4.99 and between $7.50 and $9.99 increased during the year. There was also strong growth in shipments to Spain, although it is likely that this wine will be distributed across other European markets.

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

	Volume			Value		
Destination market	**Million litres**	**% change**	**5-year CAGR**	**Million AUD**	**% change**	**5-year CAGR**
Denmark	19.4	8%	0%	$28.0	1%	-5%
Sweden	6.3	-2%	0%	$20.9	-4%	-4%
Germany	17.7	-27%	-13%	$20.8	-24%	-18%
Netherlands	6.2	3%	-14%	$20.5	7%	-11%
Belgium	9.4	-15%	1%	$15.2	-13%	-3%
France	7.5	6%	-4%	$11.6	-2%	-7%
Finland	4.2	-16%	-5%	$8.2	-18%	-9%
Ireland	1.8	-19%	-14%	$7.3	-21%	-11%
Norway	0.9	-21%	-20%	$4.1	-16%	-14%
Spain	1.1	337%	18%	$4.0	390%	29%
Poland	2.0	-3%	10%	$3.3	-34%	-2%
Switzerland	0.6	-70%	-12%	$3.1	-35%	-10%
Latvia	0.2	-61%	-7%	$1.4	-64%	-5%
Czech Republic	0.1	-81%	-31%	$0.3	-71%	-22%
Others	0.2	-66%	-38%	$1.7	-58%	-32%
Total	**77.5**	**-11%**	**-7%**	**$150.3**	**-11%**	**-10%**

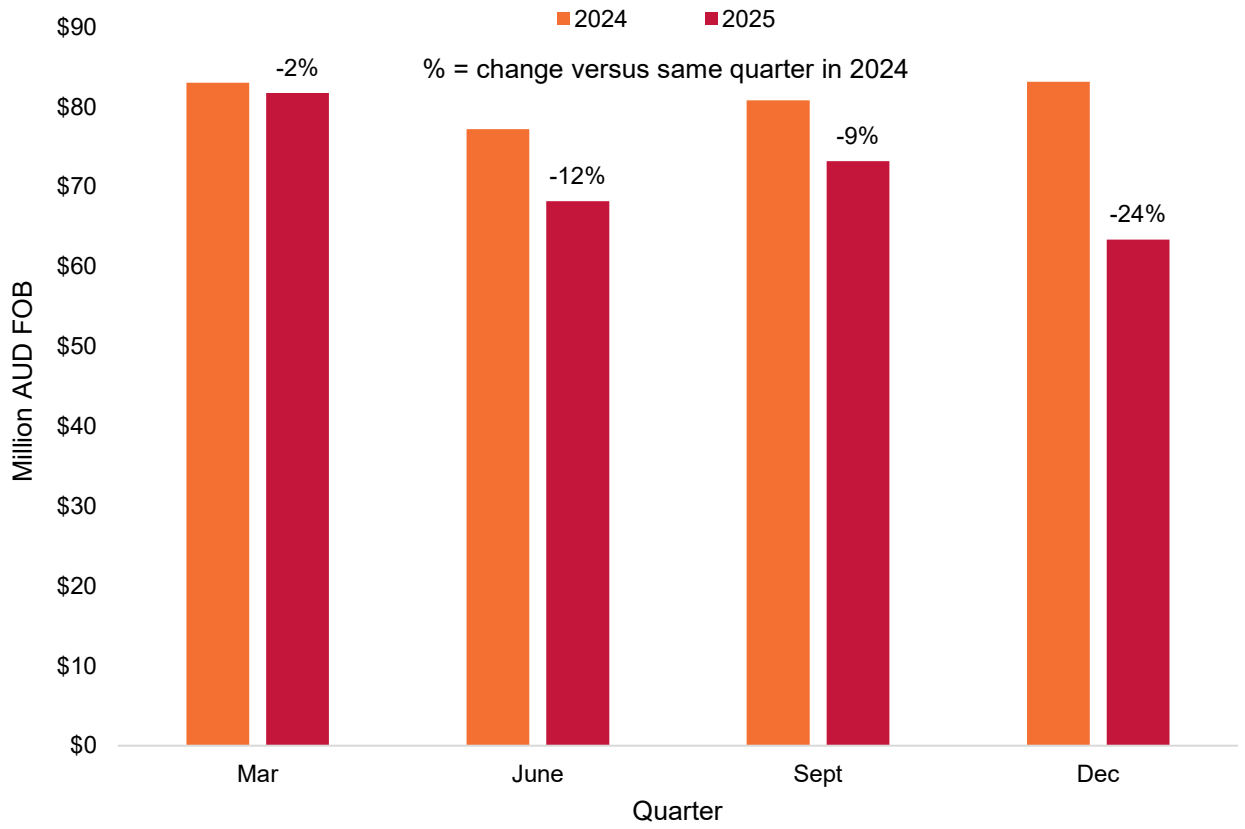
North America

United States

In the 12 months to December 2025, exports to the US declined by 12 per cent in value to $287 million, the lowest level in 25 years and representing the many headwinds for the wine category in this market. Every quarter was lower than the same quarter in 2024, with the December quarter being 24 per cent below the previous year (see Figure 11).

The US market is significantly impacted by economic uncertainty, making consumers cautious in their spending – exacerbating already existing hurdles for wine that include a loss in appeal with younger drinkers and older consumers (traditionally the market's core wine drinkers) reducing their consumption. SipSource reported that total wine depletions fell by 8 per cent over the 12 months to October 2025. This marked the fifth year of declines in the US wine market and the first time in two decades that wine sales fell below 300 million cases, according to Impact Databank.

Figure 11: Value of exports to the United States by quarter

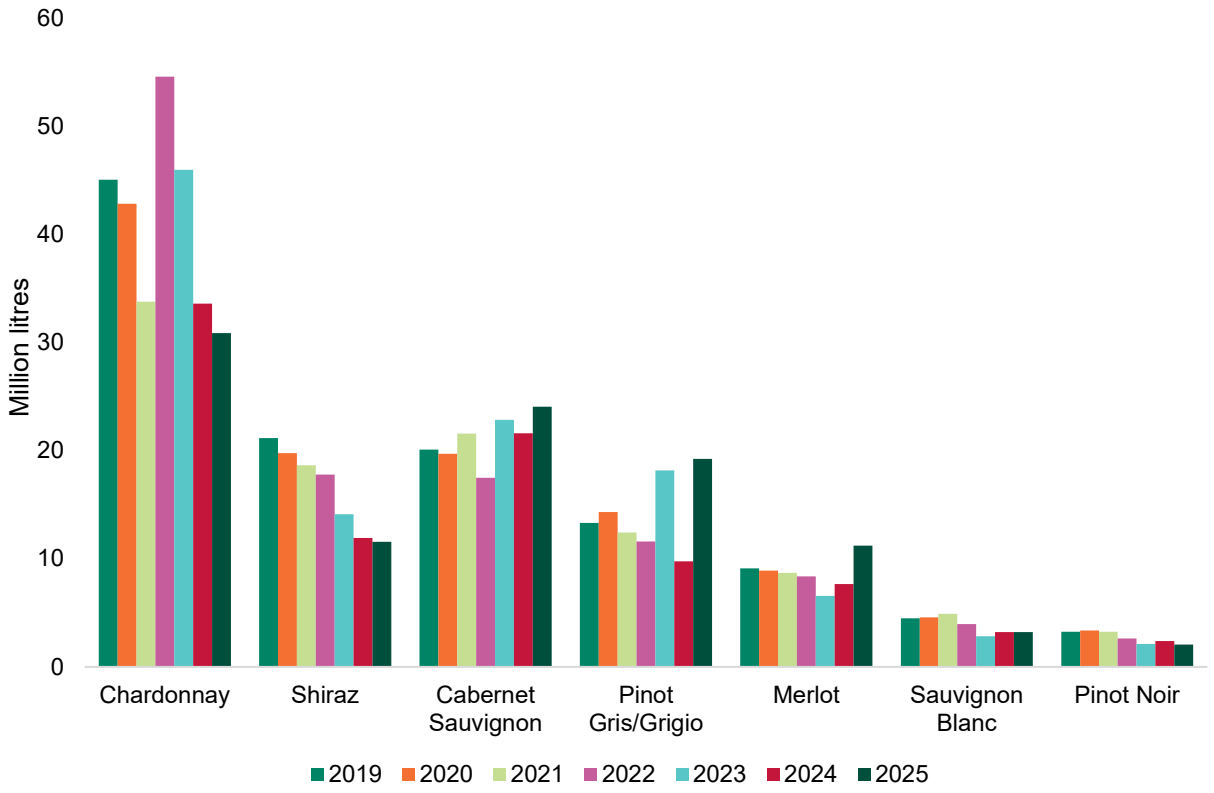


The volume of Australian wine exports increased by 11 per cent to 118 million litres, driven by a rise in unpackaged wine exports to the market in the second half of the year. Unpackaged wine exports increased by 50 per cent in volume year-on-year, while packaged wine exports declined by 20 per cent in volume. This shift towards unpackaged wine resulted in a 21 per cent drop in the average value of exports to $2.42 per litre FOB, as unpackaged wine does not include packaging costs and is therefore inherently lower in value.

The decline in packaged wines was driven by shipments valued between $2.50 to $4.99 per litre FOB – generally entry-level wines. This is the segment of the market that has declined most – by an average of 5 per cent per year over the past five years, according to IWSR. The latest Circana off-premise sales data for the US shows that the only segment of wine that grew during 2025 was the market above US$20 per bottle – up 3 per cent in volume. The heaviest declines were felt in the segment between US$4 and $11 per bottle, where most Australian wine is sold. Australian wine sales declined by 18 per cent in the US off-premise during 2025.

Both red and white wine exports increased in volume, due to the rise in unpackaged exports during the year. Cabernet Sauvignon and Merlot were the main drivers of red wine exports, while Pinot Gris/Grigio was the main white variety in growth. Shiraz and Chardonnay are both in long-term decline (see Figure 12).

Figure 12: Top varieties in exports to the United States over time



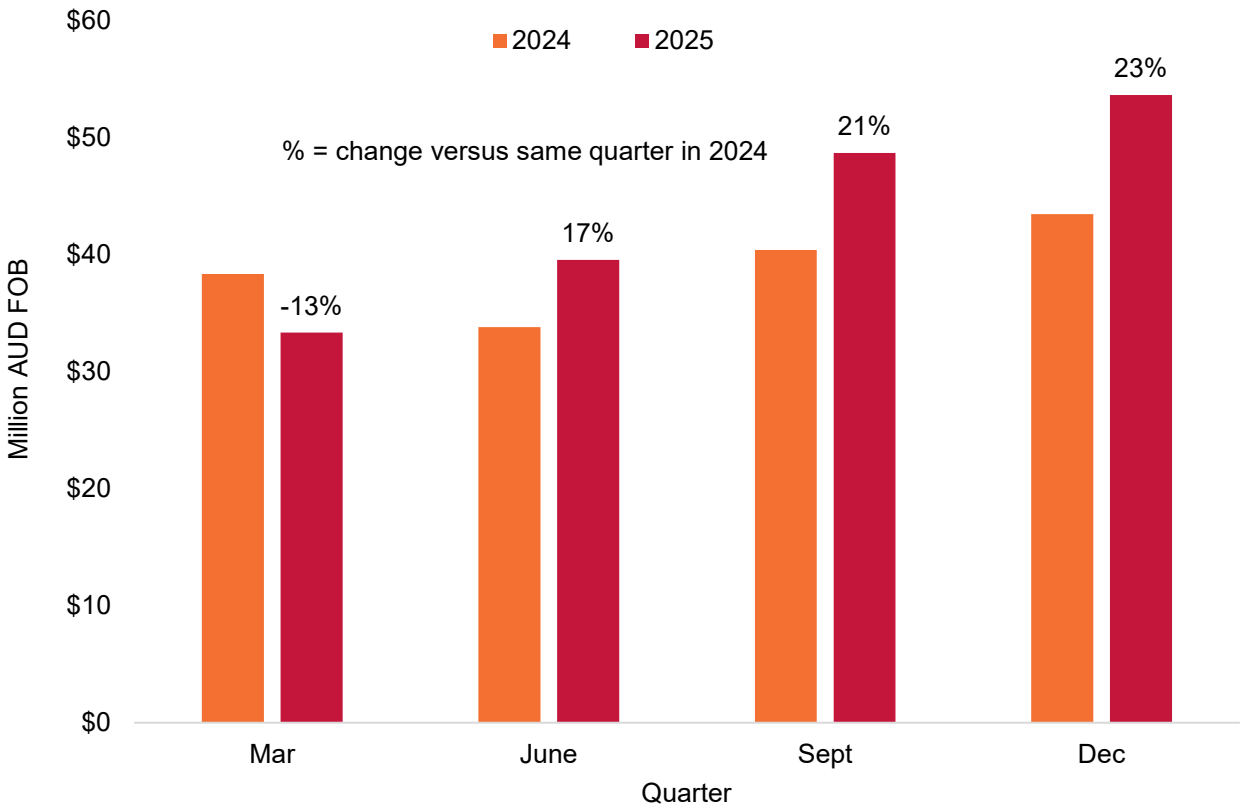
Wine Australia's Regional General Manager Americas, Aaron Ridgway said, "The early 1990s ushered in two decades of steady, predictable growth for wine in the US, reflected in consumption figures, a bountiful domestic industry and an increasingly sophisticated network of importers representing wines from abroad. This year, low single-digit decreases in volume and value are expected for California wine, while ongoing trade disputes make it virtually impossible to predict the performance of imported wines. Grape varieties Americans know and love are faring best, while retailers are starting to pass large savings onto consumers as they more aggressively trade the oversupply. Anything Australian wineries can do to establish a presence above $US11 a bottle will be beneficial in the long term."

Canada

Australian wine exports to Canada increased by 12 per cent in value to $175 million and declined by 2 per cent in volume to 64 million litres.

The increase in value was driven by a 15 per cent increase in packaged exports to Canada, with growth coming from across the price spectrum. This growth started in the second quarter of the year and continued through quarter four (see Figure 13). Many Australian brands in the Canadian market are experiencing increased sales, following the removal of American wines across Canada in response to US tariffs on Canadian products. According to the latest 2025 data from the Canadian liquor boards, Australian wine sales have increased by 24 per cent in Ontario, 8 per cent in British Columbia, and 2 per cent in Québec when comparing to the previous year.

Figure 13: Value of exports to Canada by quarter



The volume of exports to Canada declined by 2 per cent to 64 million litres, due to declining unpackaged exports to the market after a surge in 2023 and 2024. The growth in packaged shipments and decline in unpackaged shipments resulted in the average value of exports rising by 15 per cent to $2.72 per litre FOB.

The increase in packaged exports was driven by red wine – in particular Cabernet Sauvignon – as Canadian consumers looked for products of similar price point and variety to American wines. Unpackaged red wines declined by 25 per cent in volume, but unpackaged whites increased by 17 per cent – with Chardonnay, Pinot Grigio/Gris, and Sauvignon Blanc all growing in volume.

Other markets

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

- United Arab Emirates, down 24 per cent to $14 million,
- Fiji, down 17 per cent to $5.3 million,
- South Africa, down 2 per cent to $3.9 million,
- Papua New Guinea, down 30 per cent $3.2 million,
- Brazil, down 9 per cent to $1.8 million,
- Vanuatu, up 2 per cent to $1.6 million, and
- Qatar, down 38 per cent to $1.5 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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