Wine
Australia

Australian wine: Production, sales and inventory 2018–19

February 2020

Summary

The 2019 vintage was 1.73 million tonnes, in line with the 10-year average. Reds fared better than whites in terms of yield, leading to an increase in the red share of production to 54 per cent.

Wine production in 2018–19 was just under 1.2 billion litres or 133 million 9-litre case equivalents. Reds made up 57 per cent of production due to a higher net extraction rate.

Total wine sales volume was 1.295 billion litres (144 million cases), down 4 per cent compared with 2017–18 but the second highest on record and 6 per cent above the 10-year average. Total sales exceeded production by nearly 100 million litres.

Total Australian wine inventory as at 30 June 2019 is estimated to be 1.77 billion litres, a reduction of 107 million litres compared with the year before, and the lowest inventory since 2011–12.

Sales exceeded production in 2018–19 for the second year in a row, contributing to a lower stocks-to-sales ratio and rising winegrape and wine prices.

The reduction in global supply in 2019, along with a favourable exchange rate for the Australian dollar against the US dollar and continued strong demand from Asian markets, should further enhance export opportunities for Australian wine producers in 2020. However, the balance between supply, demand and price remains precarious, while the effects of recent events including bushfires and the novel coronavirus outbreak on global and local demand are yet to be determined.

Overview

Production Vintage 2019

1.73m -3%
TONNES OF GRAPES CRUSHED

1.2b -6%
LITRES OF WINE PRODUCED

Sales 2018–19

$6.36b 2%
TOTAL VALUE (AUD)

1.3b -4%
LITRES OF WINE

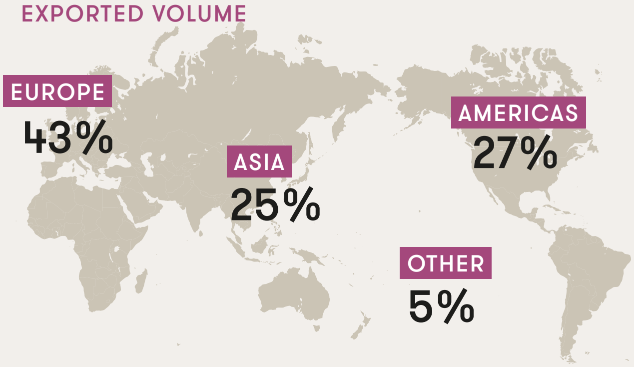
$2.9b 4%
EXPORT VALUE (AUD)

$3.5b 0.2%
DOMESTIC VALUE (AUD)

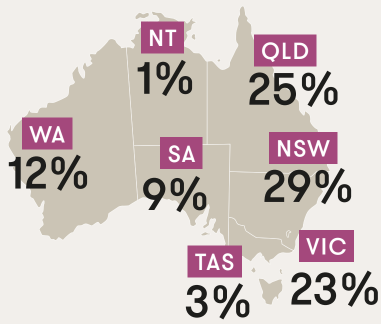
801m -6%
EXPORT VOLUME (LITRES)

494m -0.3%
DOMESTIC VOLUME (LITRES)

62%
EXPORTED VOLUME



38%
DOMESTIC VOLUME



Inventory 30 June 2019

1.77 billion -6%
LITRES OF WINE

Key statistics

Table 1: Grape crush by colour (thousand tonnes)

	2018	2019	Change	10-yr average	Change
Red grapes	925	942	2%	898	5%
White grapes	854	787	-8%	832	-5%
Total grape crush	**1779**	**1728**	**-3%**	**1730**	**0%**

Table 2: Wine production by colour (million litres)

	2017–18	2018–19	Change
Wine from red grapes	663	684	3%
Wine from white grapes	611	514	-16%
Total wine production	**1274**	**1197**	**-6%**

Table 3: Extraction rates (litres of wine per tonne)

	2017–18	2018–19	Change	10-yr average	Change
Red	717	726	1%	713	2%
White	715	653	-9%	692	-6%
Total	**716**	**691**	**-3%**	**703**	**-2%**

Table 4: Wine inventory by colour (million litres)

	2017–18	2018–19	Change
Red and rosé	990	990	0%
White	731	643	-12%
Total still wine	1721	1633	-5%
Sparkling	73	77	6%
Fortified and other products	82	58	-29%
Total inventory	**1876**	**1769**	**-6%**

Table 5: Stock to sales ratios (excluding sparkling and fortified)

	2017–18	2018–19	Change	10-yr average	Change
Red	1.34	1.42	6%	1.60	-11%
White	1.40	1.25	-11%	1.31	-5%
Total	**1.39**	**1.37**	**-2%**	**1.48**	**-8%**

Table 6: Domestic wine sales by wine style (million litres)

	2017–18	2018–19	Change
Red and rosé	208	212	2%
White	215	208	-3%
Sparkling (inc carbonated)	55	55	1%
Fortified	19	19	-1%
Total	**496**	**494**	**-0.3%**

Table 7: **Domestic wine sales value**

	2017–18	2018–19	Change
Total value ($ million)	3493	3500	0.2%
Average value ($/litre)	7.05	7.08	0.4%

Table 8: **Export wine sales by wine style (million litres)**

	2017–18	2018–19	Change
Red and rosé	530	483	-9%
White	307	307	0%
Sparkling (inc carbonated)	13	11	-19%
Fortified	1	1	2%
Total	**852**	**801**	**-6%**

Table 9: **Export wine sales value (A$ million FOB)**

	2017–18	2018–19	Change
Export sales	2757	2863	4%

Table 10: **Total sales volume (million litres)**

	2017–18	2018–19	Change
Red and rosé	738	695	-6%
White	522	515	-1%
Sparkling (inc carbonated)	69	66	-4%
Fortified	20	20	0%
Total sales	**1348**	**1295**	**-4%**

Table 11: **Total sales value (A$ million)**

	2017–18	2018–19	Change
Total sales	**6250**	**6364**	**2%**

Production

Winegrape crush

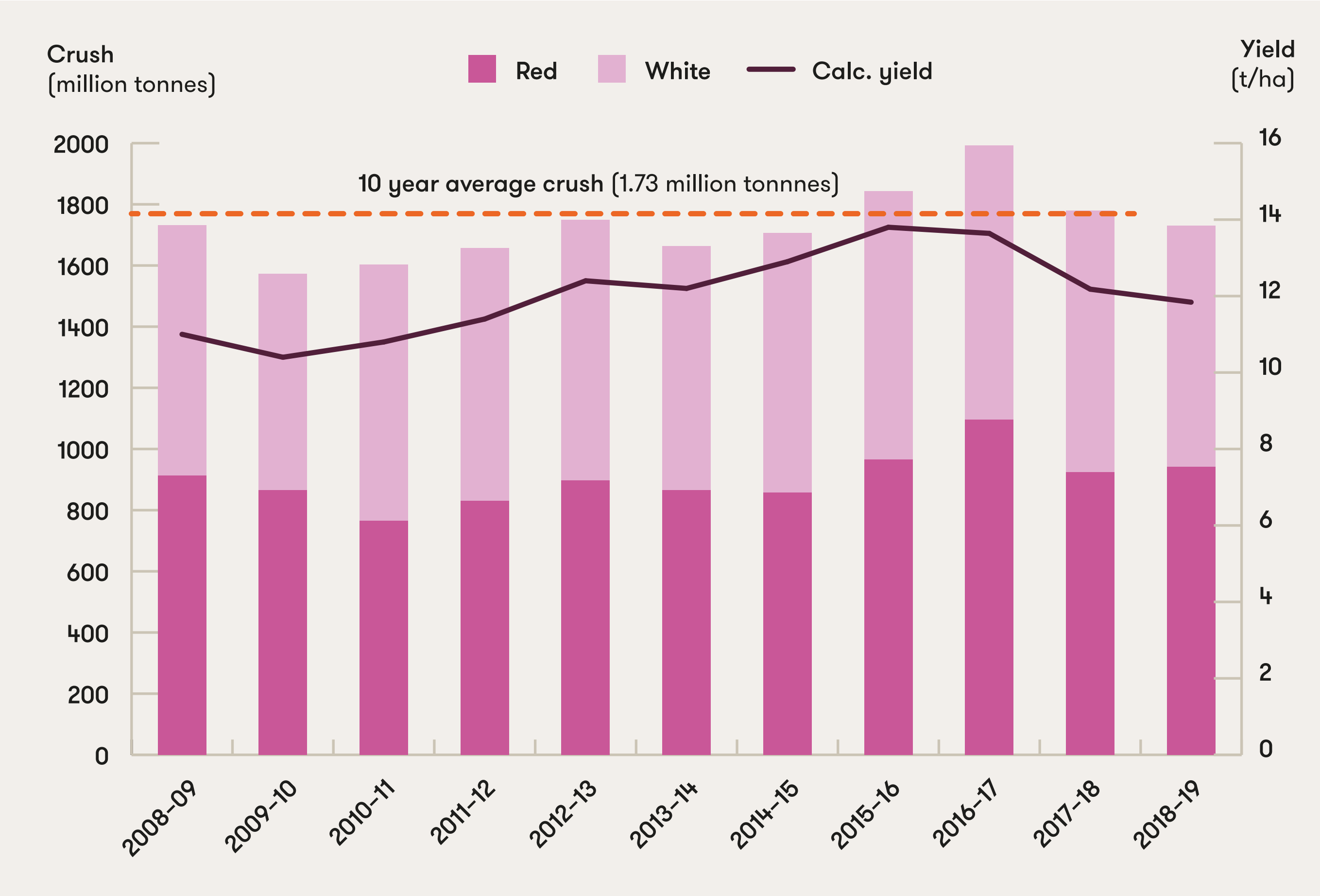
The foundation for Australian wine production in 2019 was a crush of 1.73 million tonnes, in line with the 10-year average.

Australia's vineyard area is approximately 146,000 hectares[1], giving an average yield of just under 12 tonnes per hectare.

The 2019 vintage was the second average-yielding winegrape crush in a row, after the record crop of 1.99 million tonnes in 2017 (Figure 1).

The mix of red and white changed slightly, as reds fared better than white in terms of total production. The red crush of 942,000 tonnes was 44,000 tonnes (5 per cent) above the 10-year average, while the white crush (787,000 tonnes) was 45,000 tonnes (5 per cent) below the 10-year average. This led to a fall in share of white grapes from 48 per cent to 46 per cent of the crush[2].

Figure 1: **Australian winegrape harvest by colour 2009–19**



1 National Vineyard Scan 2019
2 Figures relating to the crush are taken from the *National Vintage Survey 2019*

Wine production

Total Australian wine production in 2018–19 is estimated to be just under 1.2 billion litres, or 133 million 9-litre case equivalents[3]. This is also in line with the 10-year average (1.2 billion litres) but is 6 per cent below last year's production.

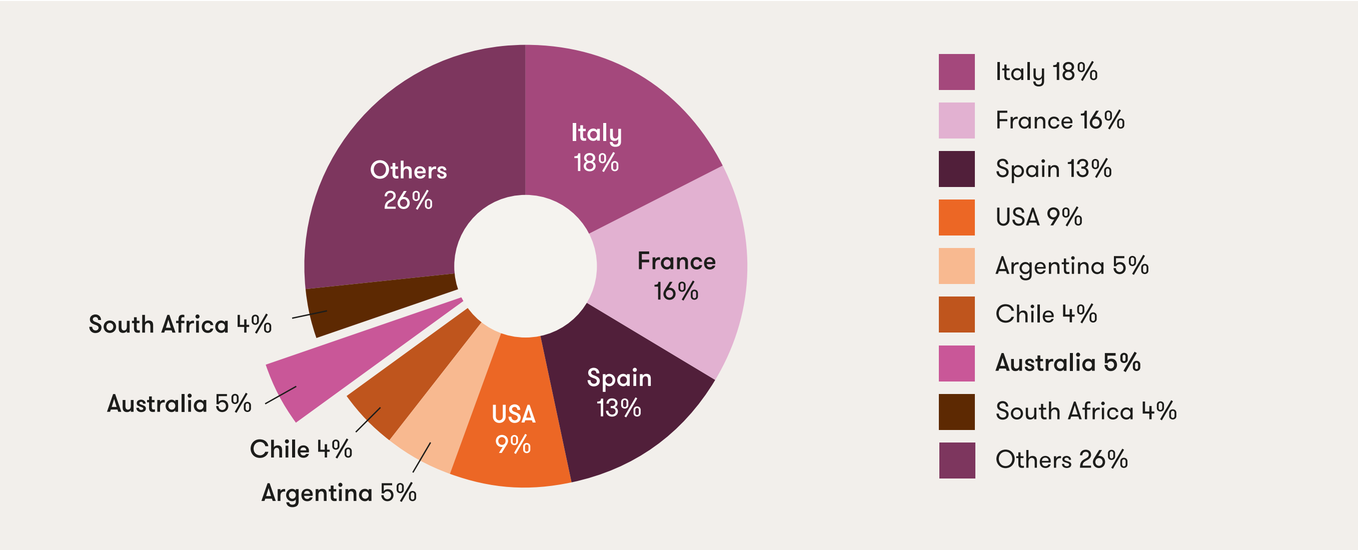
The overall decrease was a result of a 16 per cent reduction in the production of wine from white grapes, which was partially offset by a small increase (3 per cent) in wine from red grapes. Wine from red grapes accounted for 684 million litres or 76 million cases[4], while wine from white grapes accounted for 514 million litres, or 57 million cases, down by nearly 100 million litres (11 million cases) compared with 2018[5].

The extraction rate for reds was 2 per cent above the 10-year average, while for whites it was 6 per cent below the average. The lower extraction rate for white wine is partly attributable to the diversion of some white juice to other products for sale including juice, concentrate, wine-based beverages and non-alcoholic 'wine' products. Juice produced for these products has not been captured in this report.

The global context

Globally, wine production from the 2019 vintage is estimated by the International Organisation of Vine and Wine (OIV)[6] to be 26.3 billion litres. This is 10 per cent below the 2018 global production, but only 3 per cent below the long-term average (2012–18) and therefore represents a return to 'normal' after the record low 2017 vintage followed by a near-record high 2018 vintage. All major wine producing countries experienced a decline in production in 2019 compared with 2018, with the 'big three' European producers each down by 15–20 per cent, while southern hemisphere producers and the USA had only small decreases. Australia is estimated to account for 5 per cent of the 2019 global production (Figure 2).

Figure 2: **Global share of wine production by country in 2019** (source: OIV)



3 Estimate based on the annual *Wine Production, Sales and Inventory Survey* – see Explanatory notes on page 16
4 'Cases' refers to 9-litre case equivalents
5 Note that red grapes that are made into white wine (including Pinot Noir) are included with 'wine from red grapes', so the final volume of white wine may be higher than reported.
6 Estimate October 2019

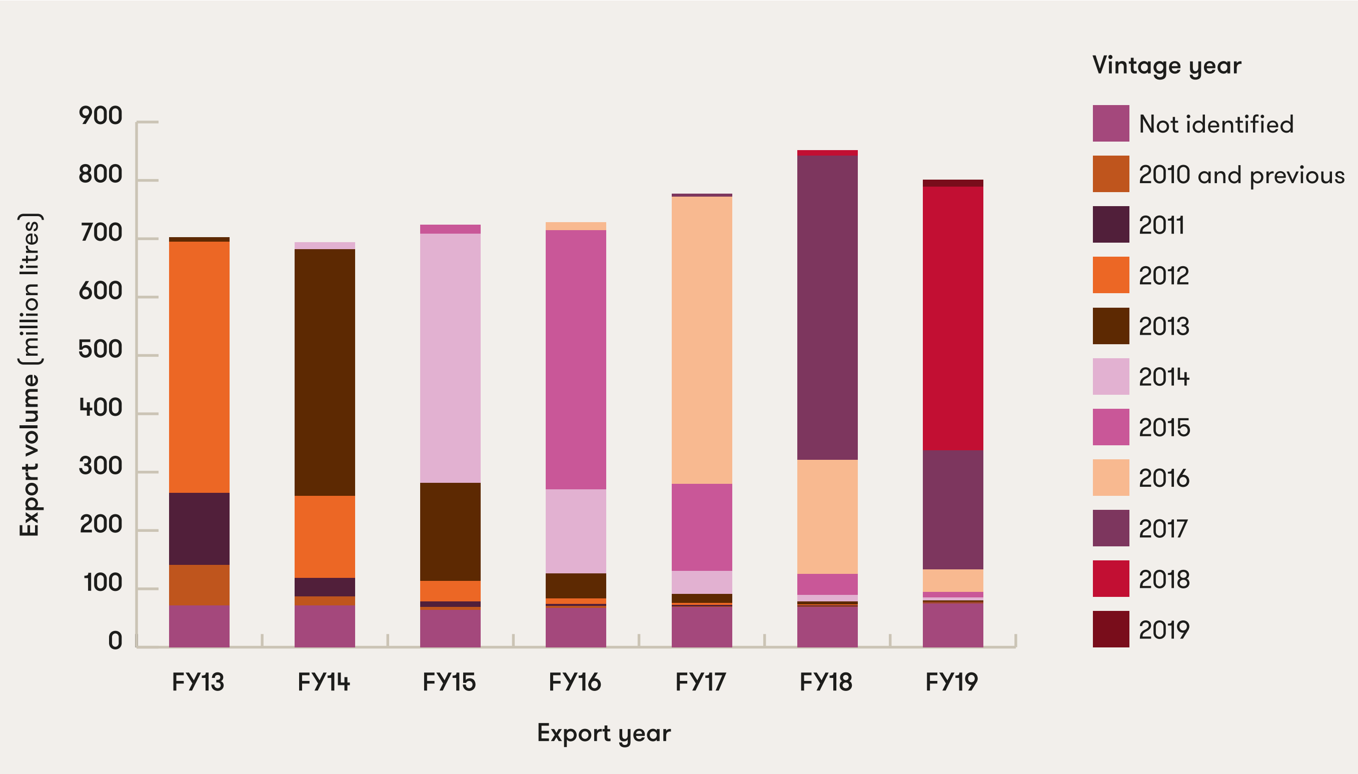
Sales

Exports

The volume of Australian wine exports in 2018–19 was 801 million litres. While this was a fall of 6 per cent compared with the 2017–18 figure, it was the second highest volume for a financial year and only the second time that the volume has exceeded 800 million litres in a financial year.

The exceptionally high volume that was recorded in 2017–18 reflects the availability of supply from the record 2017 vintage. Figure 3 below shows that approximately two-thirds of wine exported in a given financial year comes from the previous year's vintage. In FY2018, 61 per cent of wine exported was from the 2017 vintage.

Figure 3: **Export volume by financial year and vintage year of the wine content**



The decline in export volume in 2018–19 was predominantly in lower price segments, with a reduction of 63 million litres for wines below $5 per litre FOB partially offset by an increase of 12 million litres for wines $5 per litre and above FOB.[7]

Exports of white wine matched the record volume for a financial year of 307 million litres reached in 2017–18, while exports of red wine declined by 9 per cent (47 million litres) to 483 million litres. This was still the second highest volume of exported red wine for a financial year since 2006–07. Red and rosé wine made up 60 per cent of exports, over-indexing compared with their share of production.

The largest market region for Australian wine exports by volume in 2018–19 was Europe, accounting for 43 per cent of wine export volume, followed by the Americas (27 per cent) and Asia (25 per cent). China was the largest single market for red wine exports, taking 139 million litres or 29 per cent of all red wine exports, compared with 18 per cent of total exports by volume. The UK was the largest single market for white wine exports, taking 102 million litres or one-third of the total white export volume.[8]

7 All $ are AUD unless specified otherwise
8 For further details on exports in 2018–19 see the Export Report June 2019.

The value of Australian wine exports in 2018–19 was $2.86 billion[9], an increase of 4 per cent year-on-year. The increased value combined with the reduced volume resulted in a 10 per cent increase in the overall average value per litre, which reached $3.58 per litre, the highest level for a financial year since 2007–08.

Value growth occurred entirely in exports at $5 per litre FOB and above, reflecting the Australian wine sector's move to producing more highly valued products. Exports at $5 per litre and above FOB increased by $160 million, while exports below $5 per litre FOB declined by $54 million.

Domestic sales

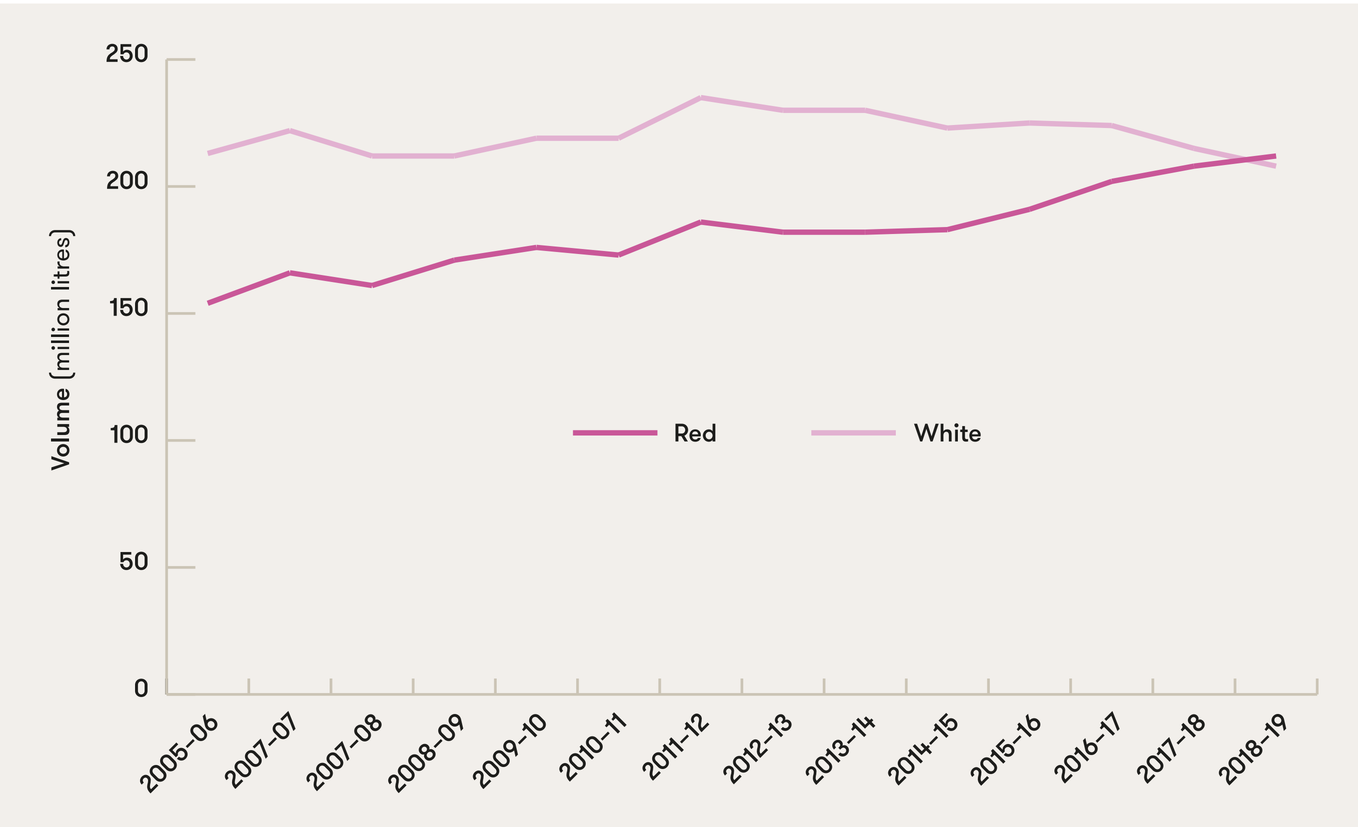
The Australian domestic wine market is the largest single market for Australian wine, accounting for 494 million litres (55 million cases) in 2018–19.

The domestic market is dominated by Australian wine, which accounts for 82 per cent of all wine sold (by volume). In export markets, Australian wine has a 72 per cent share of the New Zealand imported wine market, and the next highest share is in Malaysia, where it has a 37 per cent share of the imported wine market[10].

Domestic sales of Australian wine have been increasing slowly but steadily since 2005–06 but declined by 2 million litres (less than 1 per cent) in 2018–19. This was consistent with global trends in mature wine markets including the USA, UK and Germany, where volume declines are driven by reduced overall alcohol consumption per capita and increased competition within the alcohol sector.

The decline in Australian domestic wine sales was driven by a reduction in white wine sales of 3 per cent, which was partly offset by an increase of 2 per cent in red wine sales. For the first time, sales of red wine exceeded sales of white wine (Figure 4).

Figure 4: Sales of Australian wine on the domestic market by colour 2006–19
(source Wine Australia and IRI MarketEdge)



9 FOB value
10 Source: IWSR September 2019

Sales of sparkling wine accounted for around 11 per cent of domestic sales (6 million cases) and increased very slightly year-on-year. Responses to the *Wine Production Sales and Inventory Survey* indicate that 95 per cent of Australian sparkling wine sold on the domestic market in 2018–9 was white, 4 per cent was red and 1 per cent was rosé.

New South Wales (NSW) accounted for 29 per cent of Australian off-trade[11] wine sales by volume in 2018–19, followed by Queensland (25 per cent) and Victoria (23 per cent). Compared with their share of population, NSW and Victoria under-index on off-trade consumption of Australian wine, while the other states over-index. South Australia, Western Australia and Tasmania also have a relatively low share of imported wine retail sales (see Figure 5).

Figure 5: Comparison of off-trade wine sales – volume by state (source: IRI MarketEdge)[12]

	Share of population	Share of Australian off-trade wine sales	Imported share of total off-trade wine sales
New South Wales and ACT	34%	29%	15%
Victoria	26%	23%	15%
Queensland	20%	25%	16%
Western Australia	10%	12%	8%
South Australia	7%	9%	12%
Tasmania	2%	3%	9%
Northern Territory	1%	1%	18%
Total	**100%**	**100%**	**14%**

The value of domestic sales to wine producers is estimated to be $3.5 billion in 2018–19. This figure is a mix of wholesale, online retail and direct-to-consumer sales. Total revenue increased by just 0.2 per cent compared with the previous year, when there had been a big increase on the year before. The change in value was the result of a small increase in average value (up 0.4 per cent to $7.08 per litre) combined with the 0.3 per cent decline in volume.

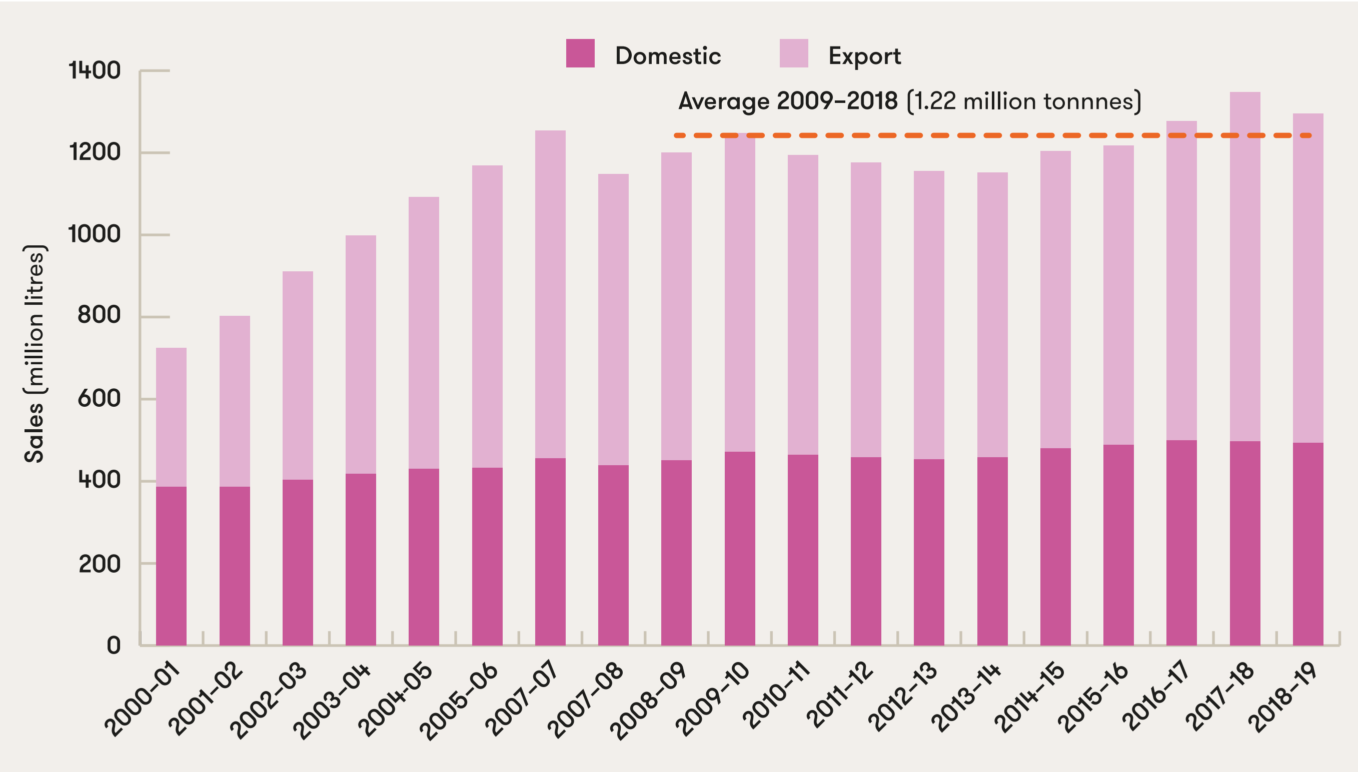
Overall, the Australian wine market was forecast by IWSR to grow in retail value by 0.14 per cent between 2018 and 2019, while IRI MarketEdge figures indicate value growth of 0.1 per cent in the Australian wine off-trade market between 2017–18 and 2018–19. The reported very small change in revenue to wine producers is in line with the overall static nature of the market.

11 Purchased for consumption off-premise – e.g. from wine retail shops or online
12 Year ended June 2019

Total sales

The total sales volume of Australian wine in 2018–19 was just under 1.3 billion litres (144 million cases), a reduction of 4 per cent compared with 2017–18, but still the second highest amount ever recorded and 6 per cent above the average for the past 10 years of 1.22 billion litres (Figure 6).

Figure 6: Sales of Australian wine 2001–19 with 10-year average



Sales volumes of both reds and whites declined overall, reflecting the reduced production; however, the reduction in red sales came from exports while the reduction in white sales came from the domestic market.

Sparkling wine sales declined by 4 per cent year-on-year. The reduction came from exports, which declined by around 2 million litres, while domestic sales were up very slightly. The majority of Australian sparkling wine sales (83 per cent) are on the domestic market, while only 17 per cent of sales volume is exported. The balance between red, rosé and white is very different between domestic and export markets (see Figure 7). In particular, rosé accounts for a significant share (although a small volume) of exported sparkling wine.

Figure 7: Share of sparkling wine sales by colour and by market

	Colour share of domestic sales	Colour share of export sales
White	95%	65%
Red	4%	9%
Rosé	1%	26%

Overall, according to the *Wine Production, Sales and Inventory survey*, 83 per cent of sparkling wine production in 2018–19 was white.

The combined revenue to Australian wine producers from export and domestic sales is estimated to be $6.36 billion, an increase of 2 per cent compared with the previous year. The increase represents an extra $114 million for the sector, despite the reduction in production and sales volumes.

Inventory

Inventory of Australian wine as at 30 June 2019 is estimated to be 1.77 billion litres, or 1.37 times the volume of sales in 2018–19. This is the lowest estimated inventory since 2011–12 and the lowest stocks-to-sales ratio (SSR) for more than 10 years.

The reduction in inventory of 107 million litres is consistent with the fact that sales in 2018–19 exceeded wine production in 2019 by nearly 100 million litres[13].

Inventory of red wine did not change. The SSR for red wine increased to 1.42, as a result of a small increase in production combined with a reduction in sales. Despite the small increase, this figure was the second lowest for at least 10 years and below the 10-year average of 1.6, indicating a tightening of supply. Red wine – particularly premium red wine – requires longer for maturation before it is ready for sale; therefore, counter-intuitively, an increase in demand can result in an increase in SSR.

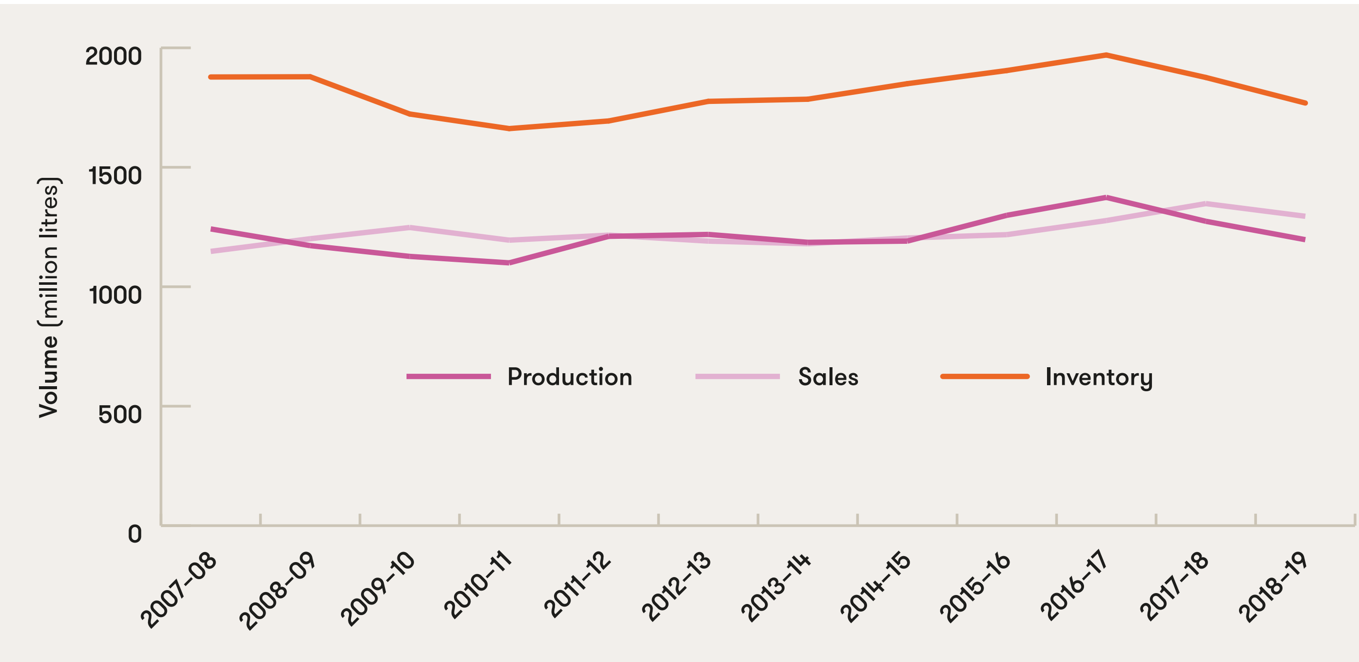
The inventory of white wine fell by 88 million litres (12 per cent), leading to a further fall in SSR from 1.40 in 2017–18 to 1.25 in 2018–19. This was the lowest for five years, but close to the 10-year average of 1.31. It reflects the fall in wine production exceeding the fall in wine sales.

Supply–demand balance

After experiencing a period of generally stable or increasing production, flat sales and rising stocks between 2010 and 2016, in the last three years the Australian wine sector has seen a strong rise in sales driven by exports and facilitated by a large crop in the context of a record low global harvest in 2017. This has produced a short-term undersupply, which in turn has contributed to rising winegrape and wine prices, particularly after the past two smaller crops were unable to match demand. Winegrape prices increased by 9 per cent in 2019, following a similar increase the year before. The average value of exports increased by 10 per cent in 2018–19, following a 9 per cent increase in 2017–18.

Figure 8 shows the peak in sales in 2017–18 following the peak in production the year before, and the shortfall between production and sales in the past two years leading to a reduction in stocks and in the stocks-to-sales ratio.

Figure 8: **Australian wine production, sales and inventory 2008–19**



13 The numbers do not match exactly due to sampling issues with the survey data, wastage and processing losses as well as timing differences in processing and disposal of wines from year to year

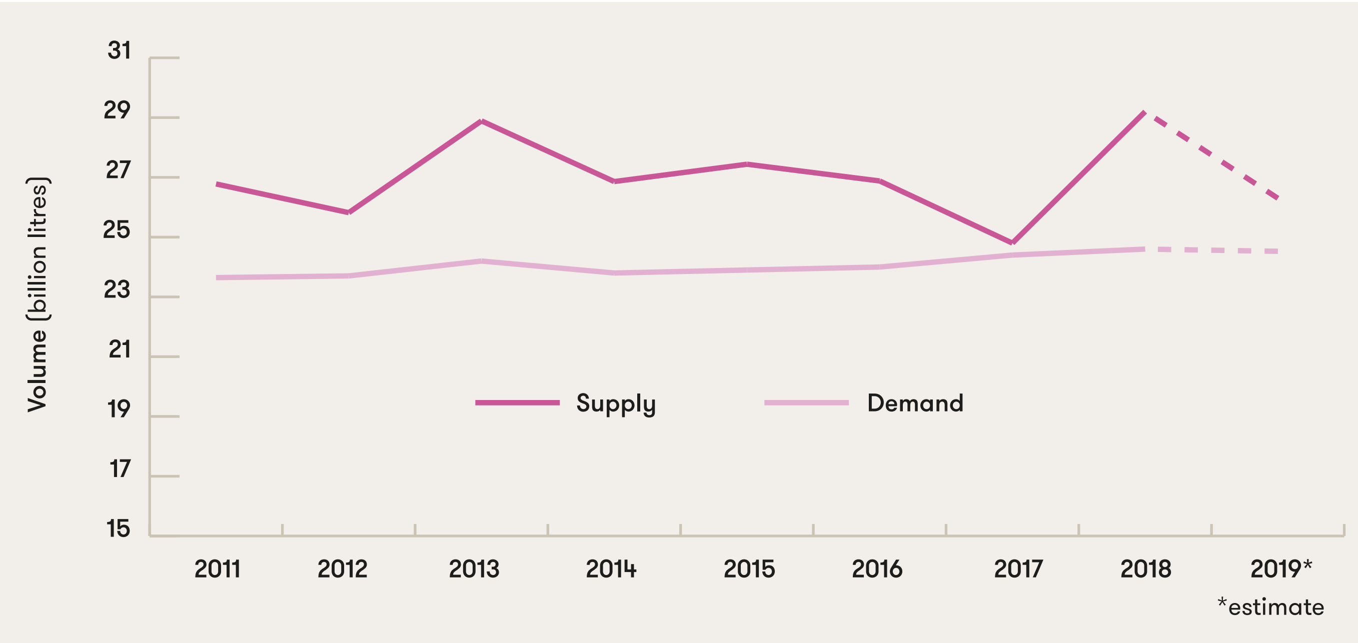
Looking forward

Based on domestic sales of 490 million litres and exports of 750 million litres, production of 1.24 billion litres is required to meet demand. This is above the 10-year average of 1.22 billion litres. The large increase in exports in 2017–18 following the record 2017 harvest demonstrates the potential for increased wine sales when supply is available. However, achieving this increase in future depends on price, the size of future global harvests and market conditions in our key export markets.

Wine and grape prices

Wine and grape prices have been trending upward for five years. However, price increases are hard to sustain in a highly competitive global market where overall demand in volume terms is flat or declining while value growth – despite premiumisation – has generally stagnated. Although global supply has decreased in 2019 compared with the near-record 2018 harvest internationally, supply is still likely to exceed demand by around 2 billion litres globally, easing supply pressures (Figure 9).

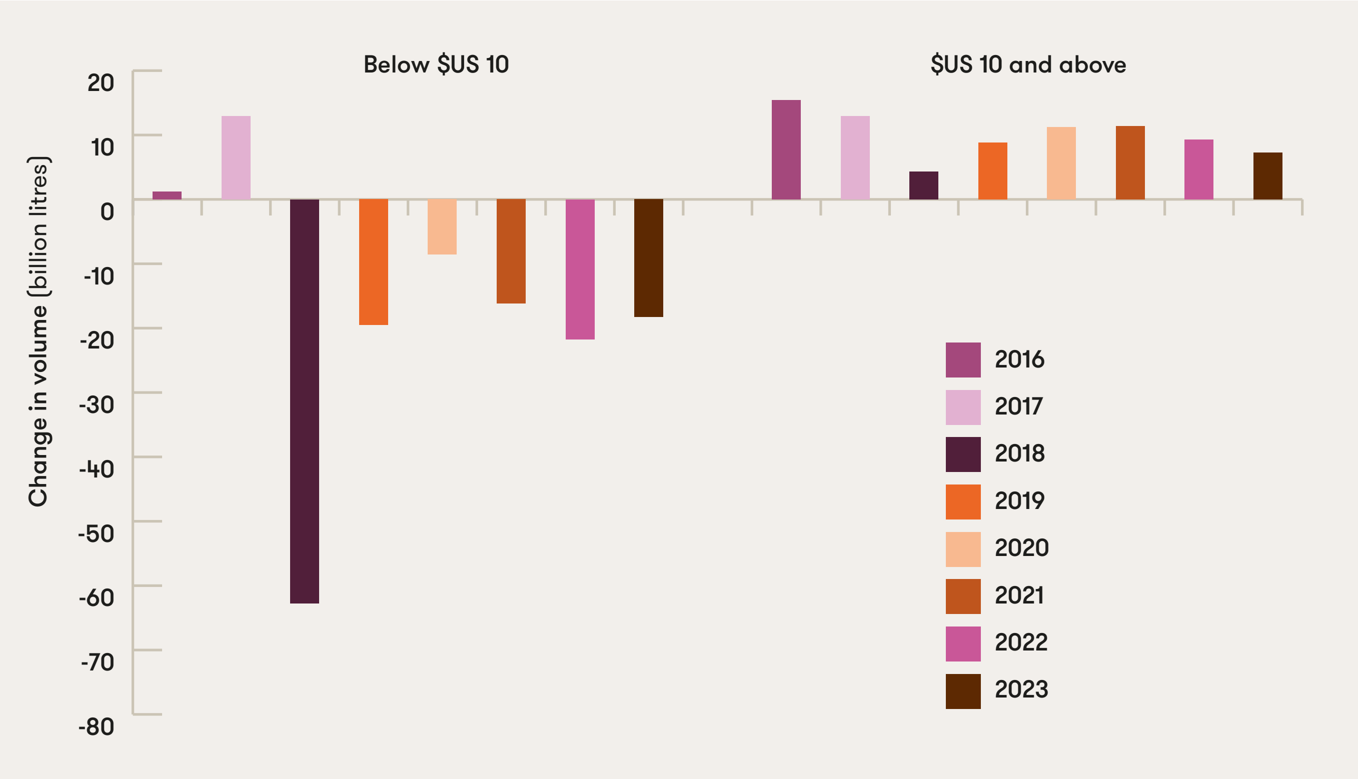
Figure 9: **Global wine supply and consumption 2011–19** (source: OIV)



Rising winegrape prices in Australia, driven by constrained supply, increasing costs (particularly water) and competition from other crops, will put pressure on wine margins that will be difficult to translate into higher sales prices – depending on the market, price point and extent to which the wine is substitutable.

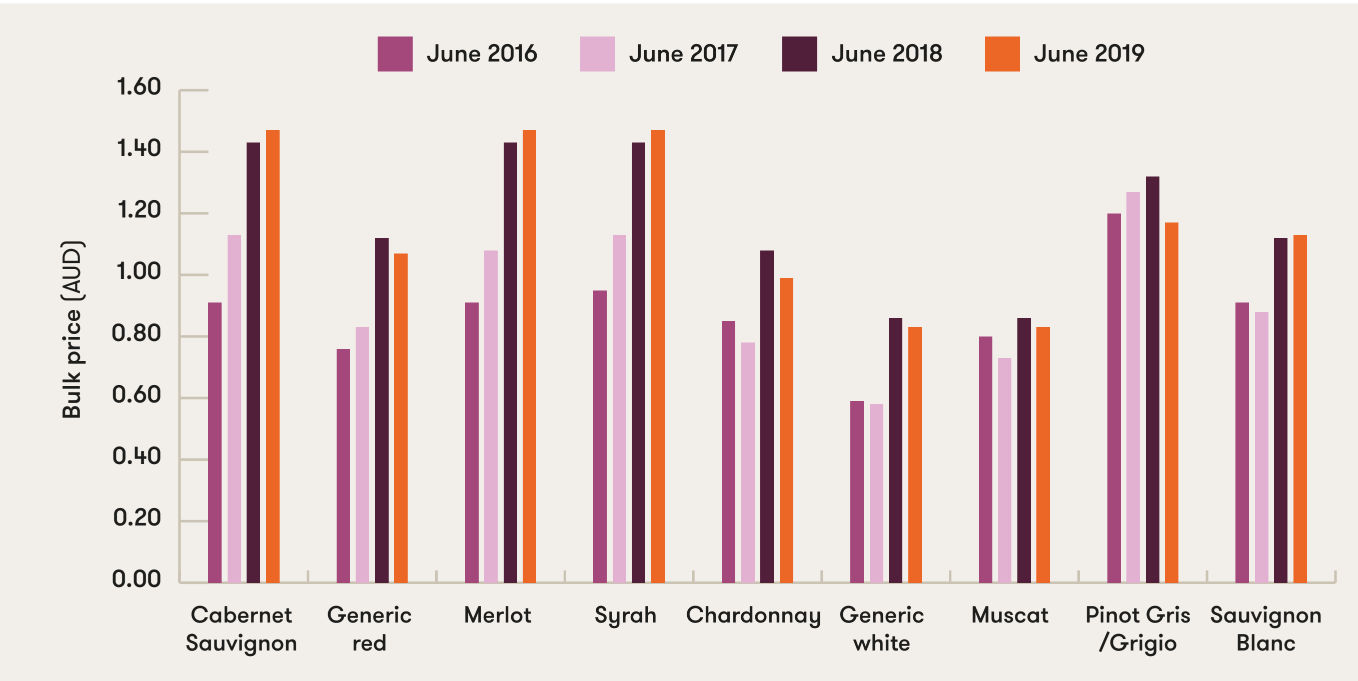
This pressure on prices is likely to be felt particularly in the commercial sector. Figures from the IWSR show that all global reductions in consumption since 2016 and forecast reductions from 2018 to 2023 are in the lower price segments: the equivalent of below US$10 per bottle. Between 2016 and 2023, the below US$10 segment is expected to decline by 1.2 billion litres (133 million cases or 4 per cent of the 2016 total consumption) while the US$10 and above category is expected to increase by 726 million litres (80 million cases) or 25 per cent (Figure 10).

Figure 10: **Changes in global wine consumption by price segment 2016–2023** (source IWSR)



There is already evidence of a softening in wine prices on the global bulk wine market. In the year ended June 2019, bulk wine prices (in USD) for Australian wine declined for all major varieties by between 3 per cent (Shiraz, Cabernet Sauvignon and Merlot) and 16 per cent (Pinot Gris/Grigio). Even when converted to AUD, only the three major red varieties were (slightly) higher in June 2019 than in June 2018 (Figure 11).

Figure 11: **Australian bulk wine prices year-on-year comparison** (source: Ciatti)



Market conditions

Market conditions are not expected to change dramatically in the near future. The global market has been characterised by uncertainty for the past few years due to the protracted withdrawal of the UK from the European Union and ongoing trade tensions between the USA and many other countries. This means uncertainty will prevail for Australian wine producers in two of our largest export markets, exacerbated by declining consumption and (in the case of the USA) an over-supply of local wine production. The Australian domestic market is also experiencing declining consumption and increased competition from imports and alternative beverages.

A significant factor in the outlook for the Australian wine sector will be what happens to wine imports in China. In 2017–18, China's wine imports grew by 100 million litres to reach nearly 800 million litres, making China the world's third largest wine importer. Australia accounted for over 50 per cent of this growth, which underpinned its record total exports of 852 million litres in that year.

However, in 2018–19 China's wine imports fell by 19 per cent and Australia's exports to China fell by 30 million litres (17 per cent) although value continued to grow strongly. What happens in the next few years in the world's fastest growing wine market will have a significant bearing on the overall direction and performance of the Australian wine sector.

Outlook

The outlook for the Australian wine sector is generally positive in the short-term. The reduction in global supply in 2019, along with a favourable exchange rate for the Australian dollar against the US dollar and continued strong demand from Asian markets, should further enhance export opportunities for Australian wine producers in 2020.

However, the balance between supply, demand, price and international competition remains precarious. The effects of recent events including bushfires and the novel coronavirus outbreak on global and local demand are yet to be determined, while an above-average harvest in 2021 would reverse the current situation where demand exceeds supply.

Historic production, sales and inventory statistics

Table 12: **Production, sales and inventory statistics 2008–19**

		2007–08	2008–09	2009–10	2010–11	2011–12	2012–13	2013–14	2014–15	2015–16	2016–17	2017–18	2018–19
Red													
Crush	(thousand tonnes)	959	913	866	766	830	898	866	857	965	1096	925	942
Extraction rate	(litres per tonne)	703	689	718	732	728	733	703	703	715	697	717	726
Wine production	(million litres)	674	629	622	561	604	658	609	602	690	764	663	684
Inventory	(million litres)	1022	1011	961	910	899	987	1014	1027	1010	1085	990	990
Exports (table wine)	(million litres)	446	442	468	447	435	406	385	406	424	465	530	483
Domestic sales (table wine)	(million litres)	161	171	176	173	186	182	182	183	191	202	208	212
Total sales (table wine)	(million litres)	607	612	644	620	621	588	567	589	615	667	738	695
SSR	(years)	1.68	1.65	1.49	1.47	1.48	1.70	1.82	1.78	1.64	1.63	1.34	1.42
White													
Crush	(thousand tonnes)	873	819	707	837	828	851	797	850	879	896	854	787
Extraction rate	(litres per tonne)	651	662	715	644	733	659	725	693	692	680	715	653
Wine production	(million litres)	568	543	505	539	607	561	578	589	609	609	611	514
Inventory	(million litres)	663	670	581	586	629	633	615	677	743	739	731	643
Exports (table wine)	(million litres)	243	292	291	267	268	281	296	304	292	296	307	307
Domestic sales (table wine)	(million litres)	212	212	219	219	235	230	230	223	225	224	215	208
Total sales (table wine)	(million litres)	456	504	511	486	503	511	526	527	518	520	522	515
SSR	(years)	1.46	1.33	1.14	1.21	1.30	1.29	1.20	1.33	1.44	1.42	1.40	1.25
Total													
Crush	(thousand tonnes)	1832	1733	1573	1602	1658	1748	1663	1707	1845	1992	1779	1728
Extraction rate	(litres per tonne)	678	676	716	686	730	697	713	698	704	690	716	691
Wine production	(million litres)	1242	1172	1127	1100	1211	1219	1186	1191	1299	1374	1274	1197
Inventory (table wine)	(million litres)	1685	1681	1542	1496	1528	1620	1629	1704	1752	1824	1721	1633
Inventory (total*)	(million litres)	1878	1879	1723	1662	1694	1776	1785	1850	1905	1970	1876	1769
Exports (table wine)	(million litres)	690	734	759	714	703	687	681	710	716	761	837	790
Exports (sparkling and fortified)	(million litres)	19	17	18	17	15	15	14	14	12	16	14	12
Domestic sales (table wine)	(million litres)	373	383	396	393	421	412	411	406	416	426	423	420
Domestic sales (sparkling and fortified)	(million litres)	66	67	75	72	77	76	75	74	73	74	74	74
Total sales	(million litres)	1148	1201	1248	1195	1216	1191	1180	1204	1218	1277	1348	1295
SSR	(years)	1.64	1.56	1.38	1.39	1.39	1.49	1.51	1.56	1.56	1.54	1.39	1.37

Explanatory notes

Survey method

Data sources

Wine Australia's *Wine Production, Sales and Inventory Survey 2019* was sent to the top 150 wineries based on grape crush size in 2019. Wine Australia received responses from 58 wineries, including 26 of the top 30 by volume, accounting for an estimated 75 per cent of the total grape crush in 2019.

In addition, a number of other data sources were used to inform the final figures, including: Australian Bureau of Statistics, IRI Market Edge Liquor, IWSR, Levies Revenue Service, Wine Intelligence, Winetitles and Wine Australia.

Notes on calculations

Grape crush and wine production

The grape crush figure is obtained from the *National Vintage Survey 2019* and is used as the basis for calculating wine production. The proportion of the crush accounted for by the survey respondents to the *Wine Production, Sales and Inventory Survey* is used to raise the wine production figure reported by these respondents to obtain a national figure.

Extraction rates

Extraction rates are calculated as beverage wine produced divided by total tonnes crushed. Wine-based beverages and other grape products are excluded from the calculation of extraction rates.

Domestic sales value

Domestic sales value is based on winemaker receipts comprising mostly wholesale transactions but also cellar door and direct sales and is therefore a mix of wholesale and retail prices. Respondents are asked to exclude GST and other taxes. Total domestic sales value has been estimated by multiplying the average value per litre (calculated from the survey results) by the total estimated sales volume.

Exports

Export sales figures are obtained from the *Wine Australia Wine Export Approval System*, which records the volume and value of all exported shipments of Australian wine over 100 litres.

Inventory

The inventory figures published in this report are obtained from the survey, with a raising factor applied to allow for the estimated non-response rate.

The calculated figure has been validated by checking the balance calculation (production minus sales equals change in inventory). While the alignment is not perfect due to a number of variables such as change in use of red grapes to white wine, production of sparkling and fortified from different vintage grapes and allowance for wastage etc., it is considered to be within an acceptable tolerance.

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Further information on this report can be obtained from the Market Insights team at Wine Australia on 08 8228 2000 or market.insights@wineaustralia.com.