

Growth and Cycles in Australia's Wine Industry:

A Statistical Compendium, 1843 to 2013

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Published in Adelaide by the University of Adelaide Press

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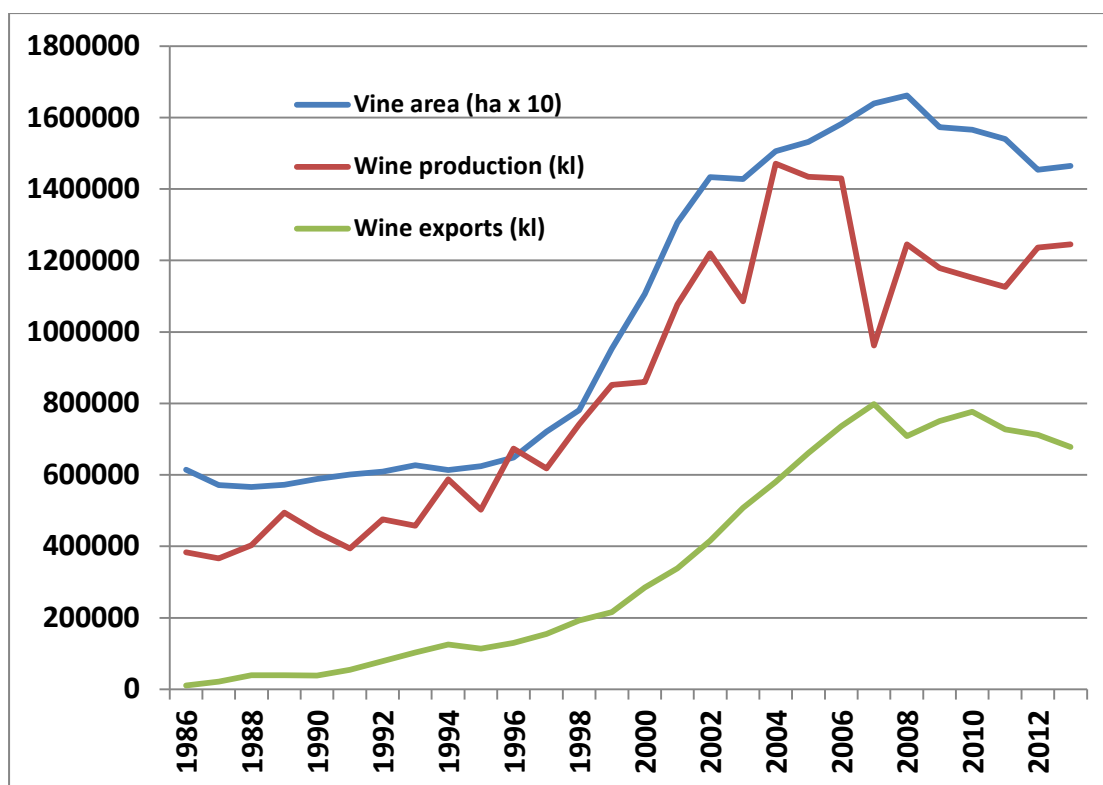
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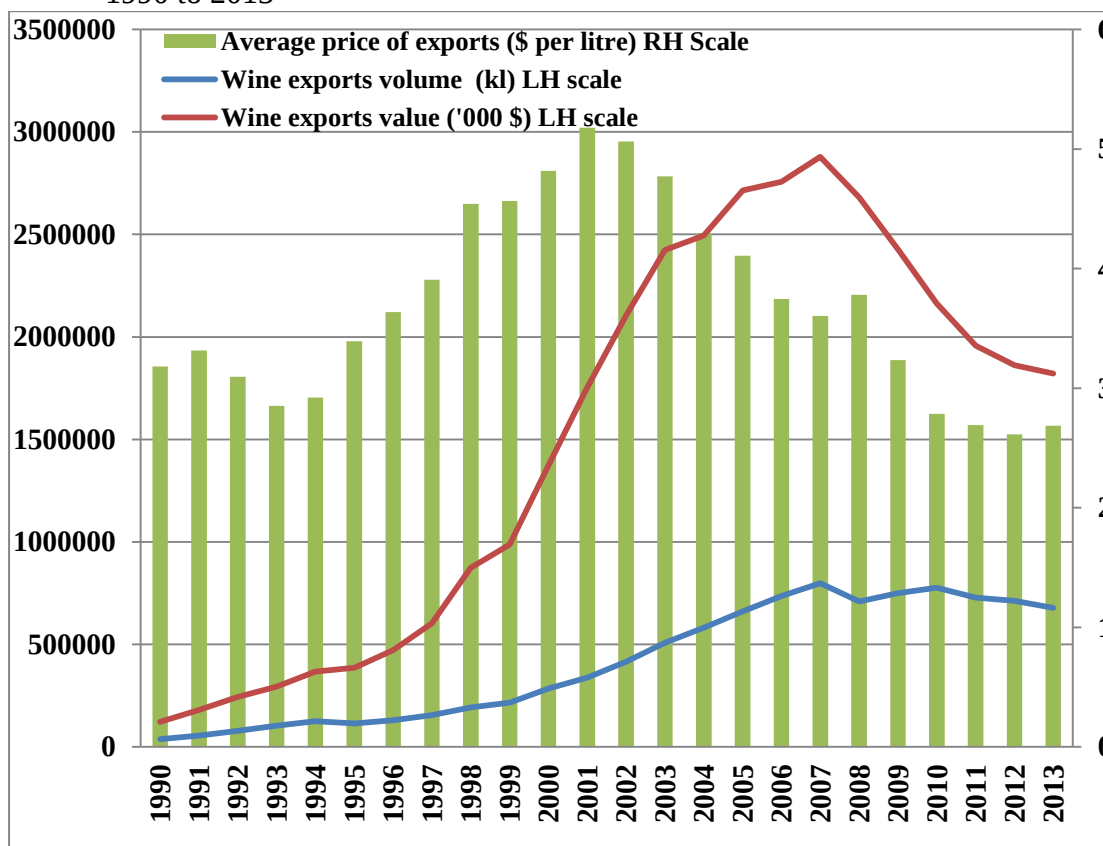
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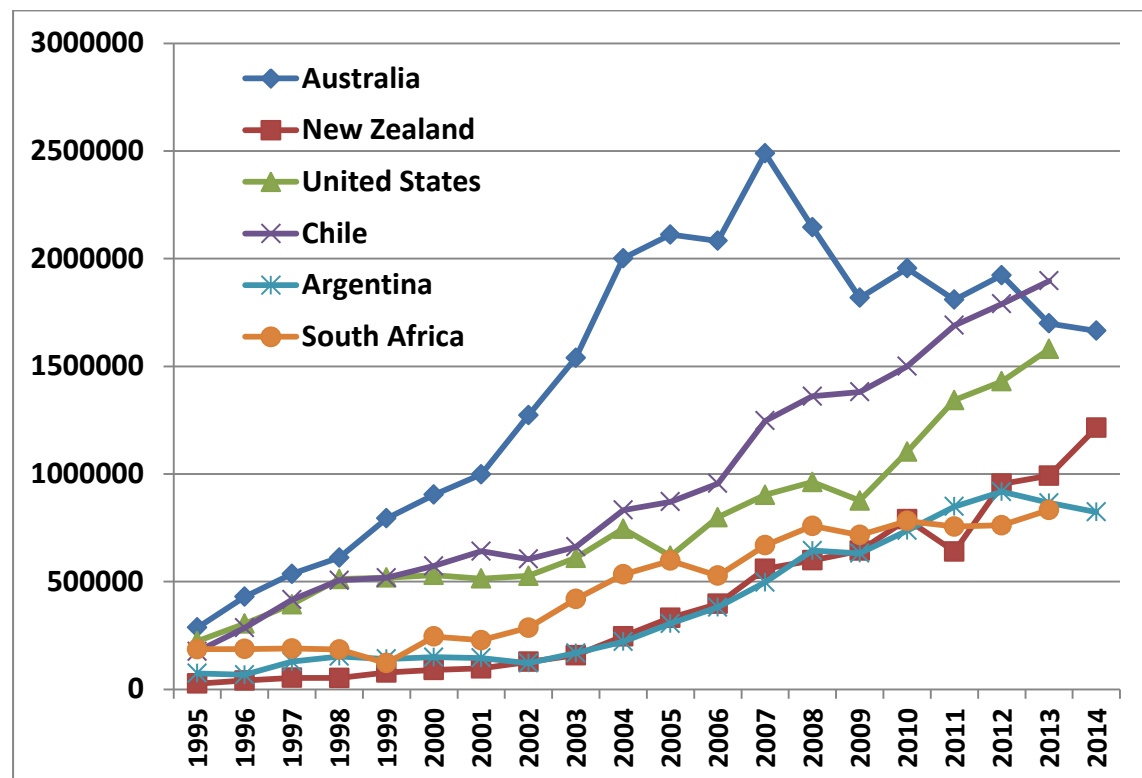
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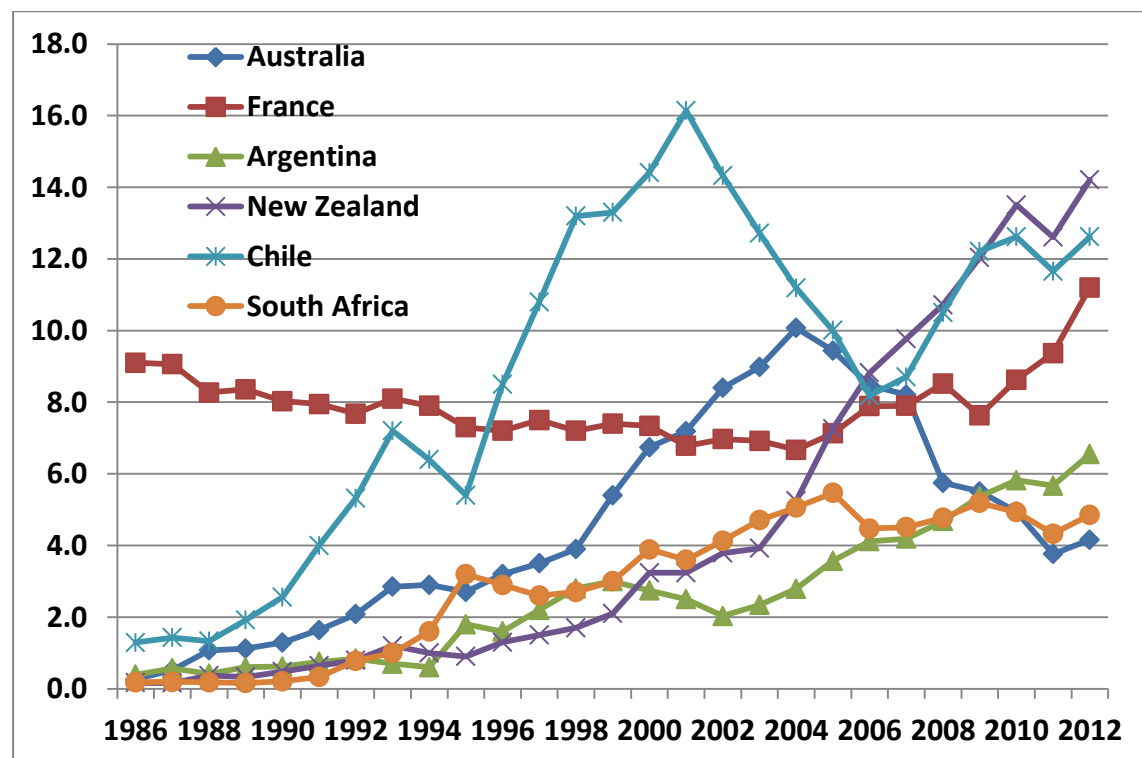
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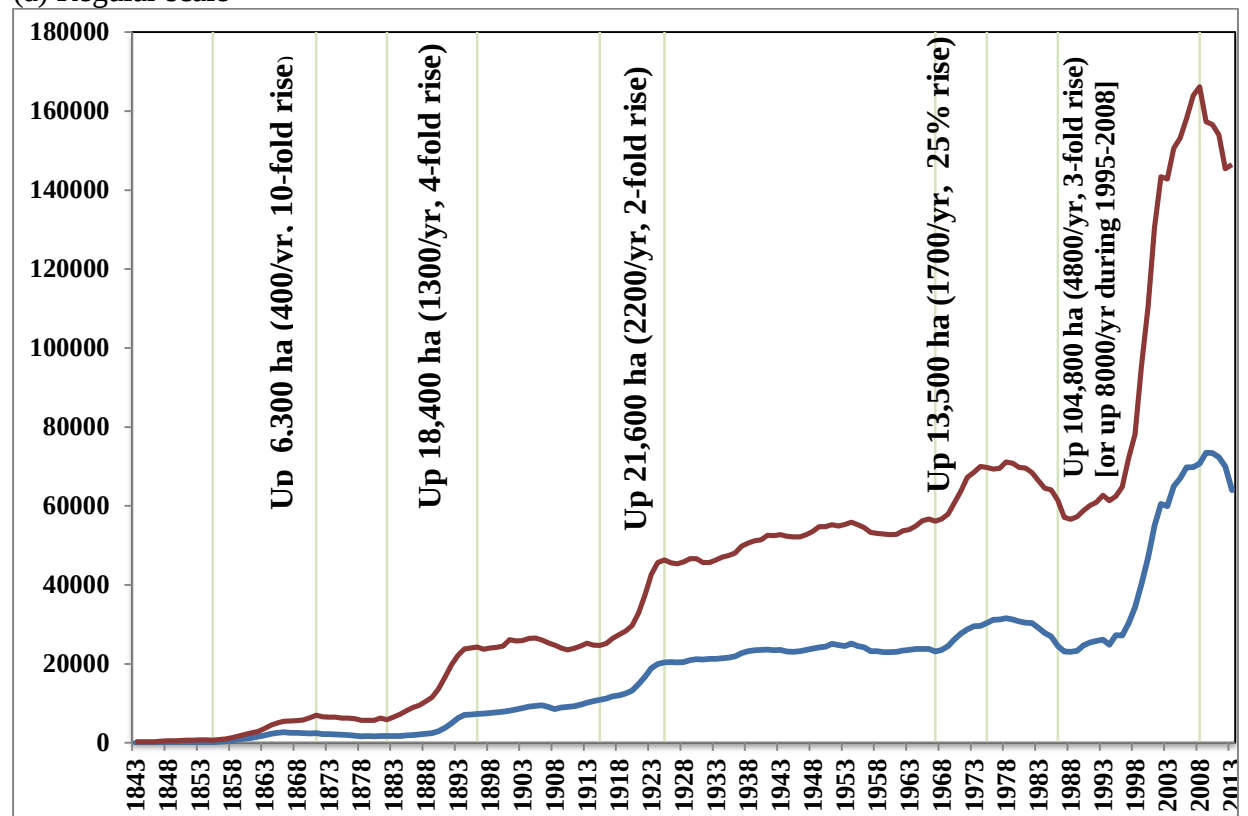
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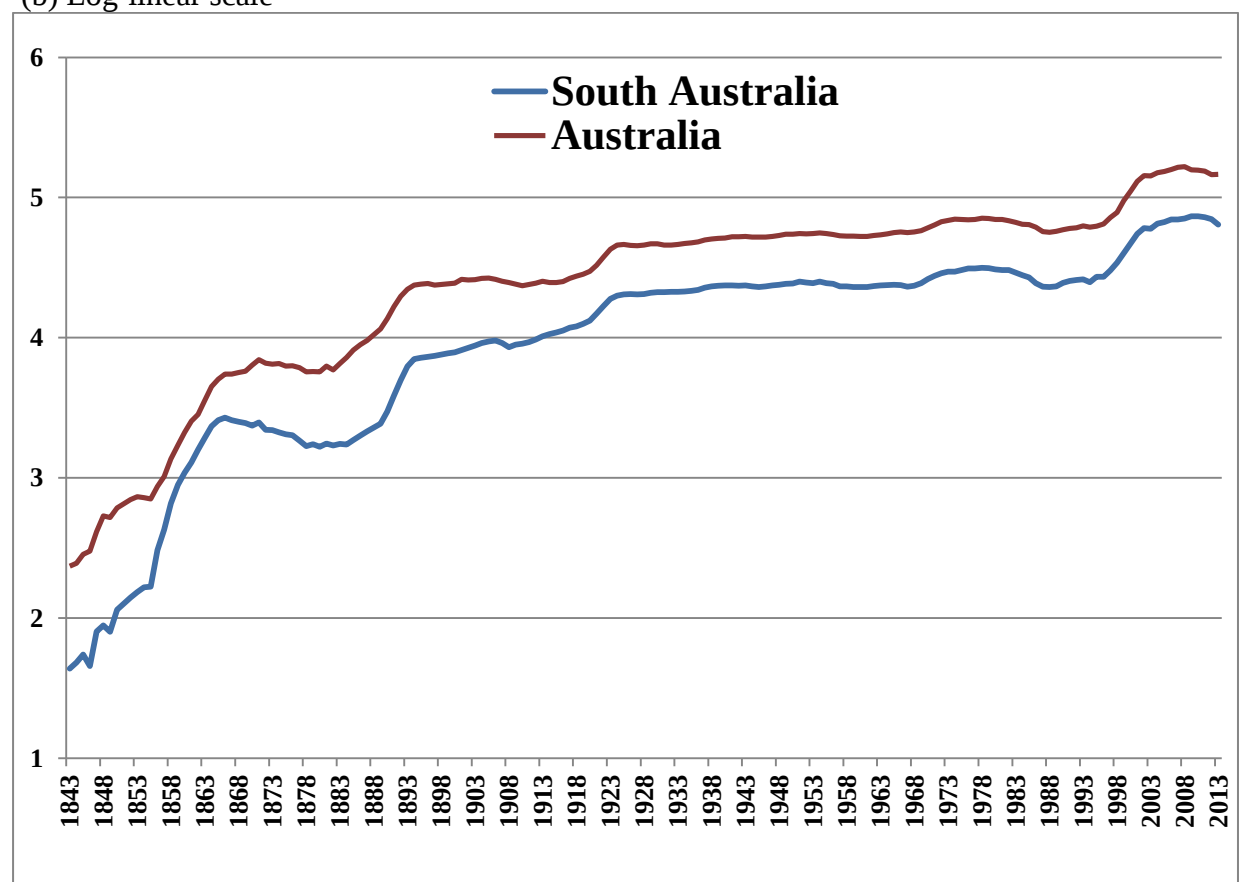
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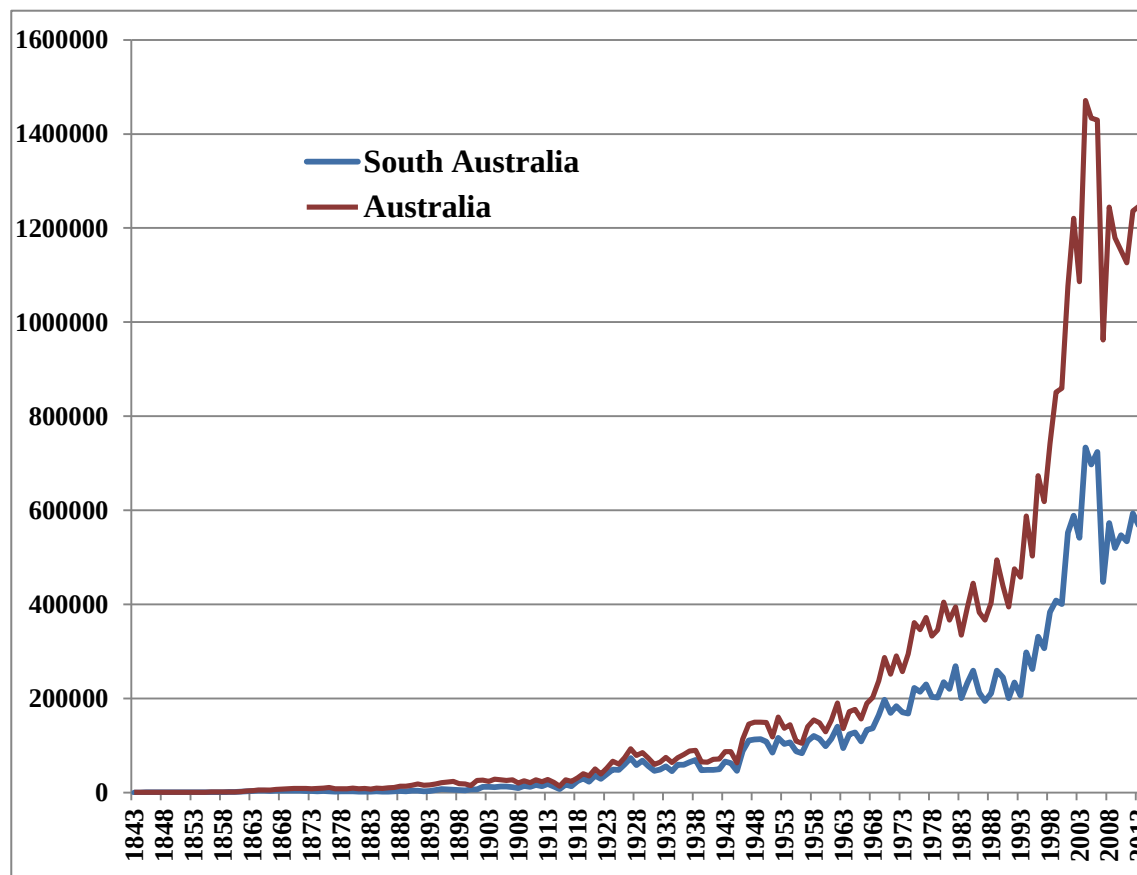


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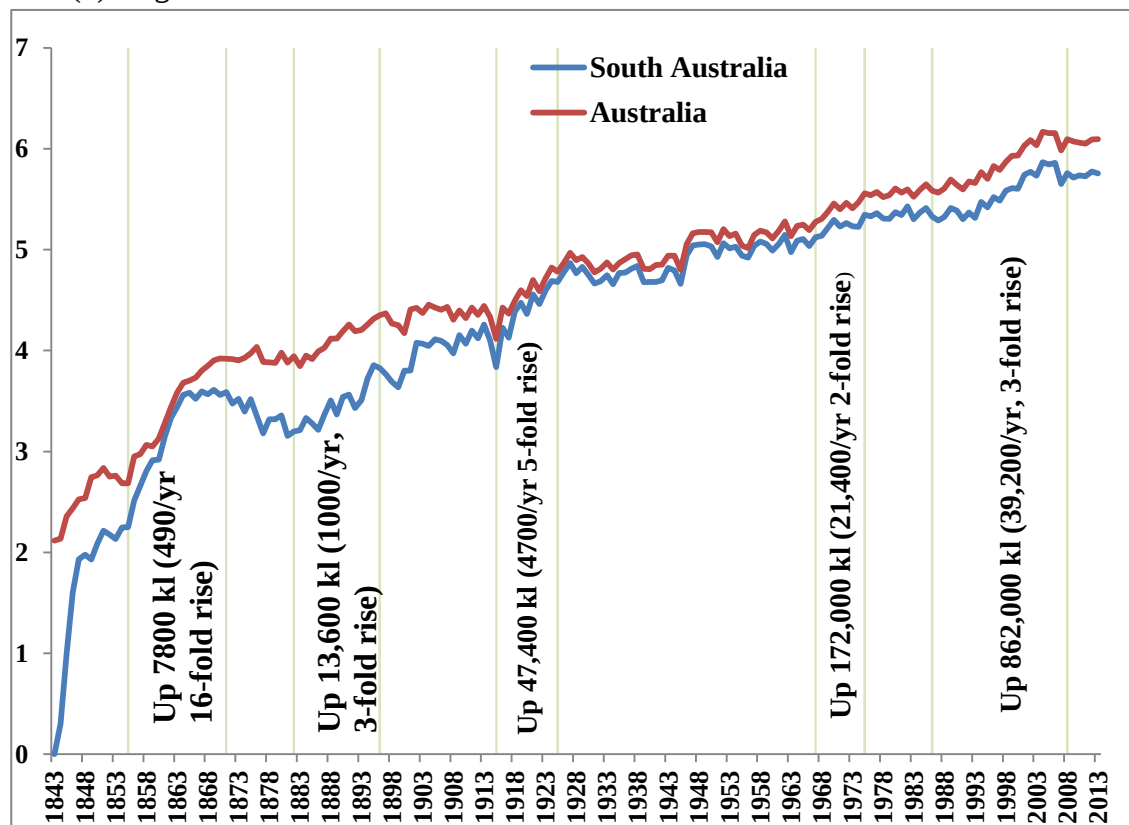


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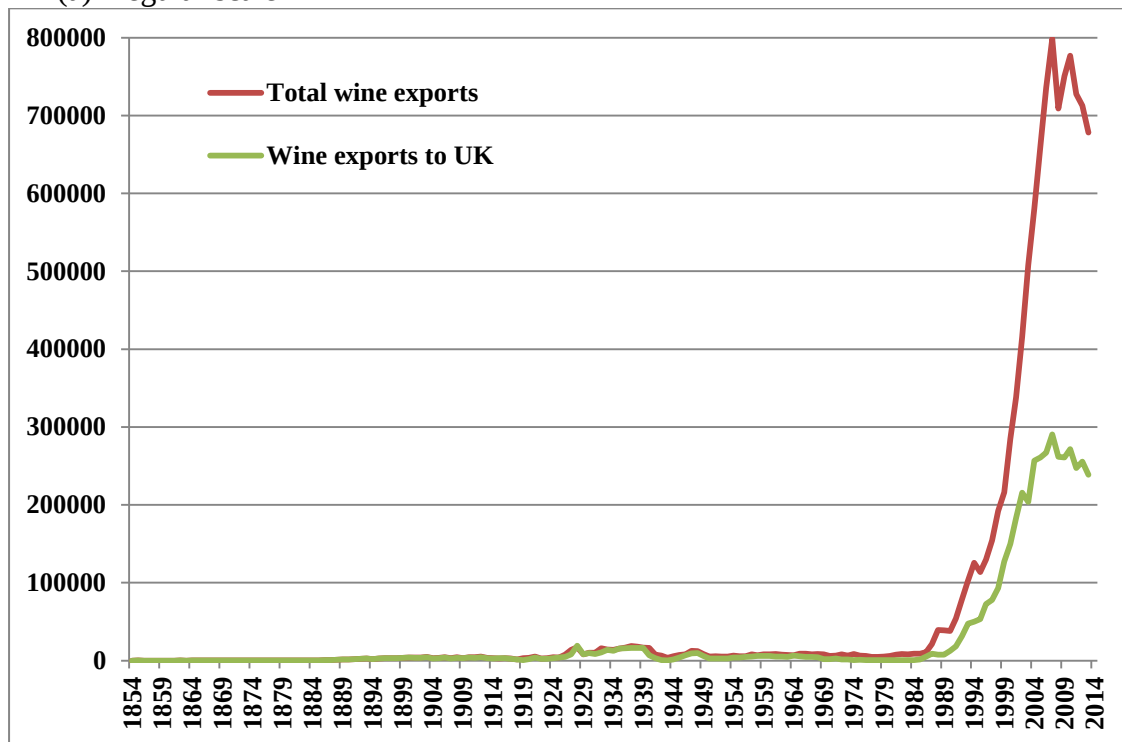


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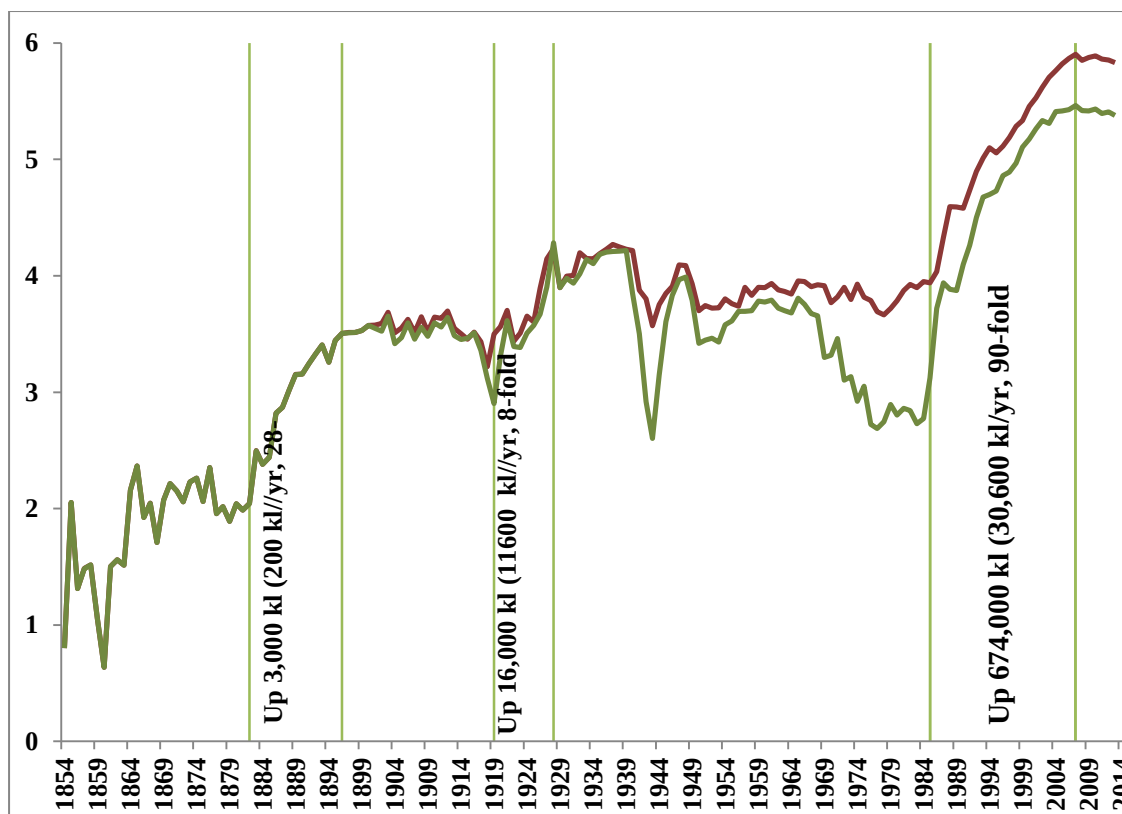


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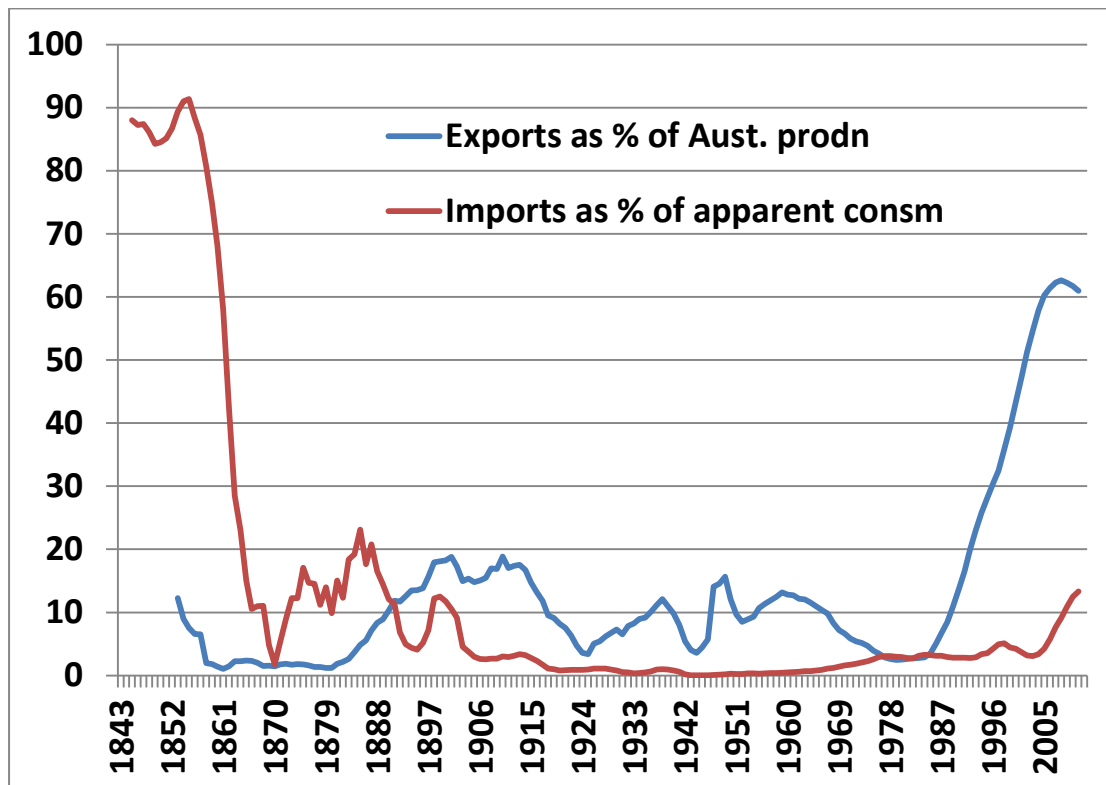
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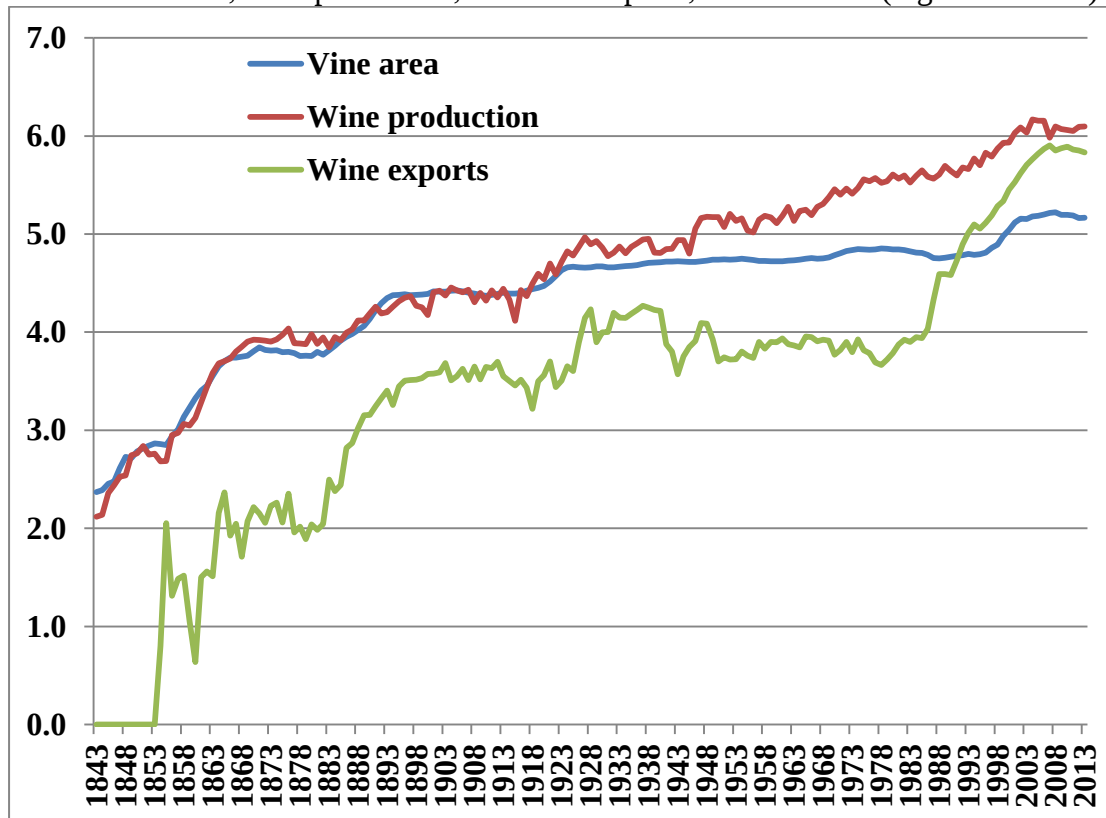
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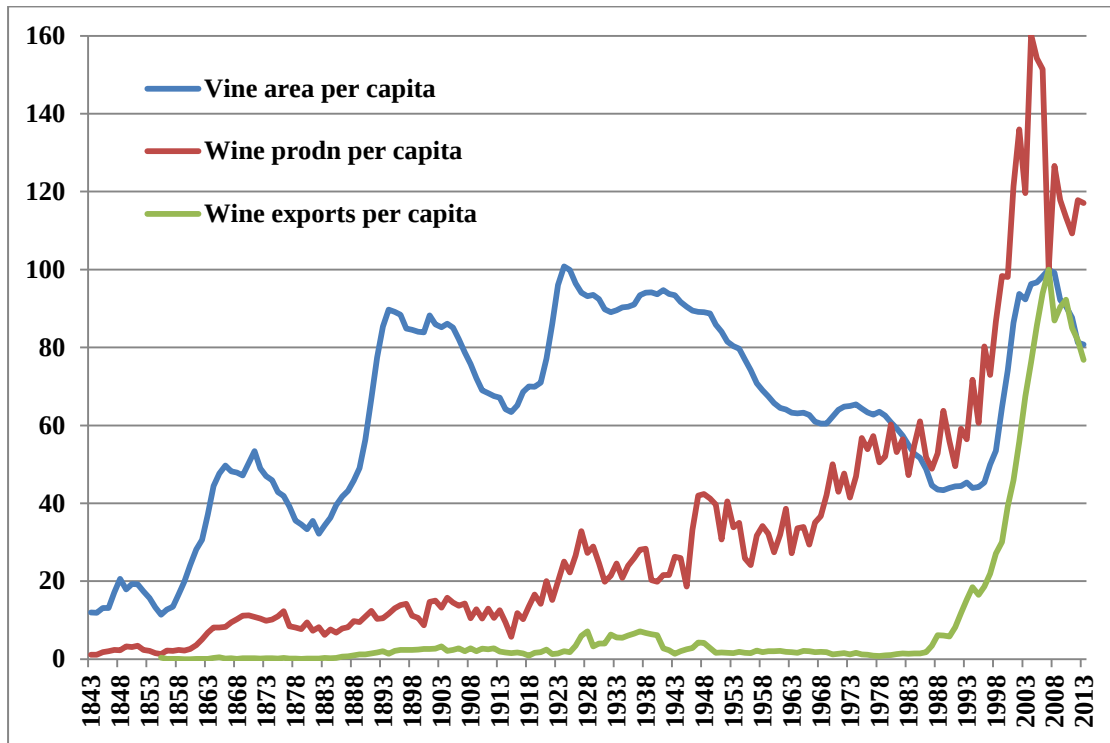
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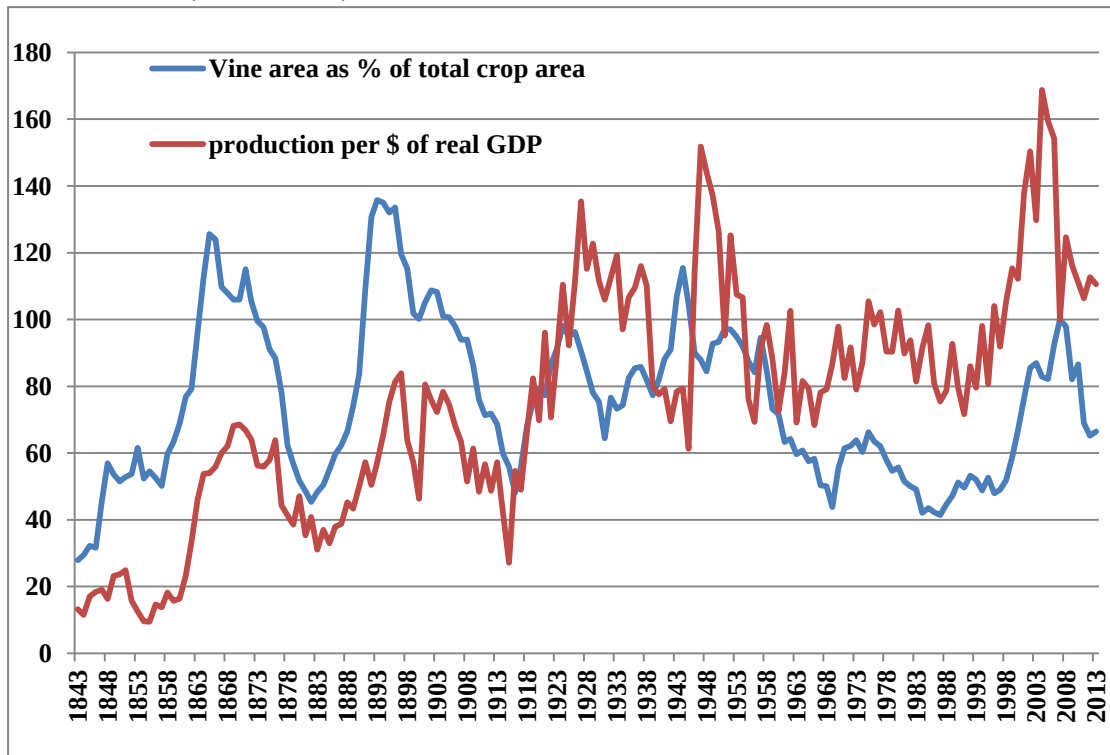
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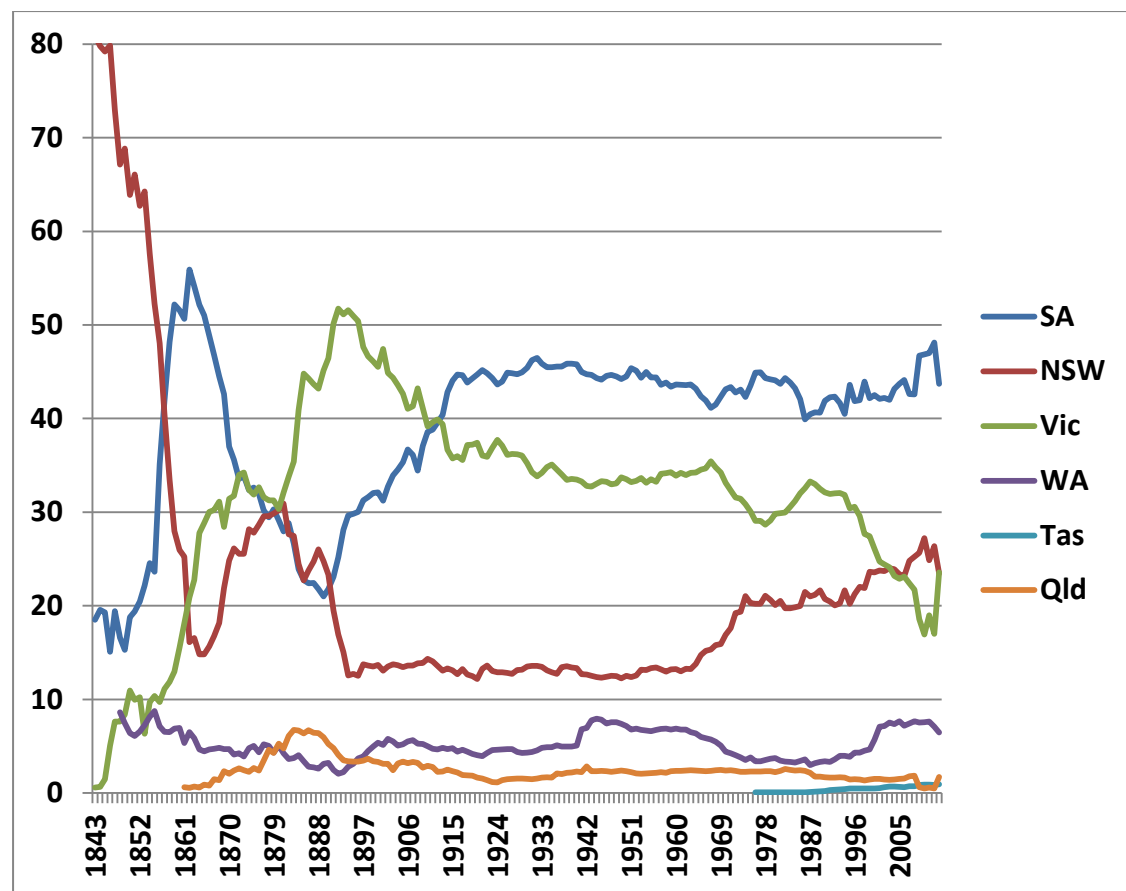
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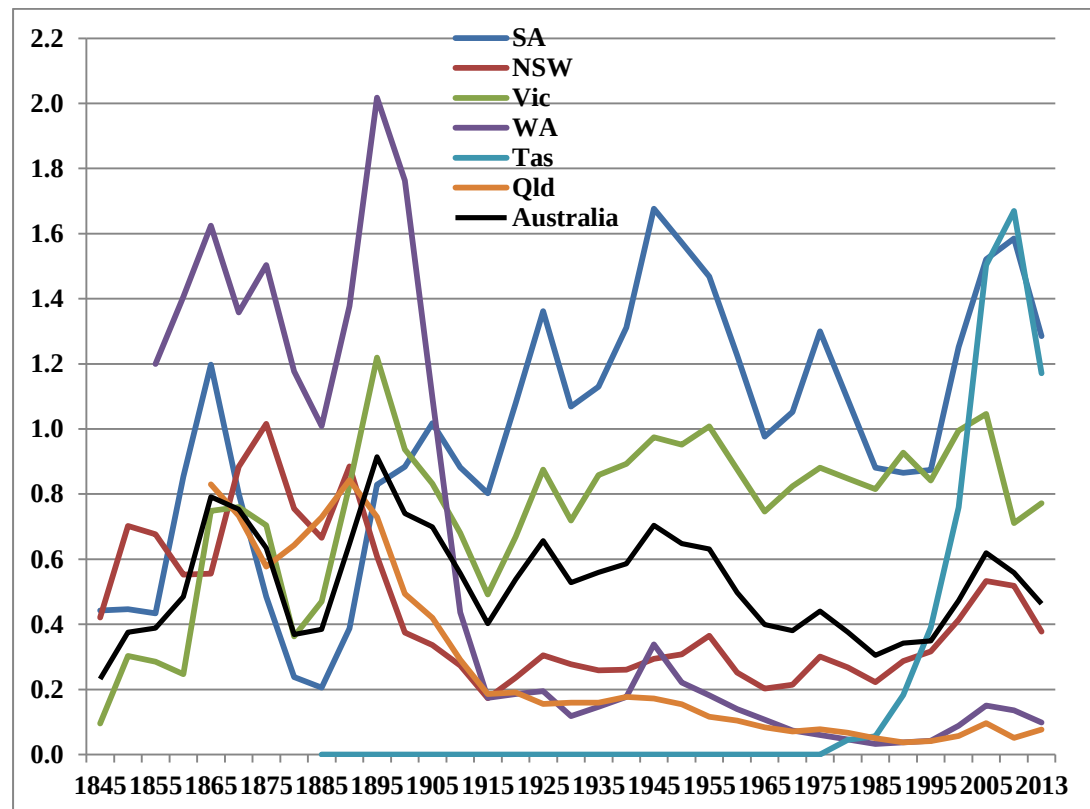
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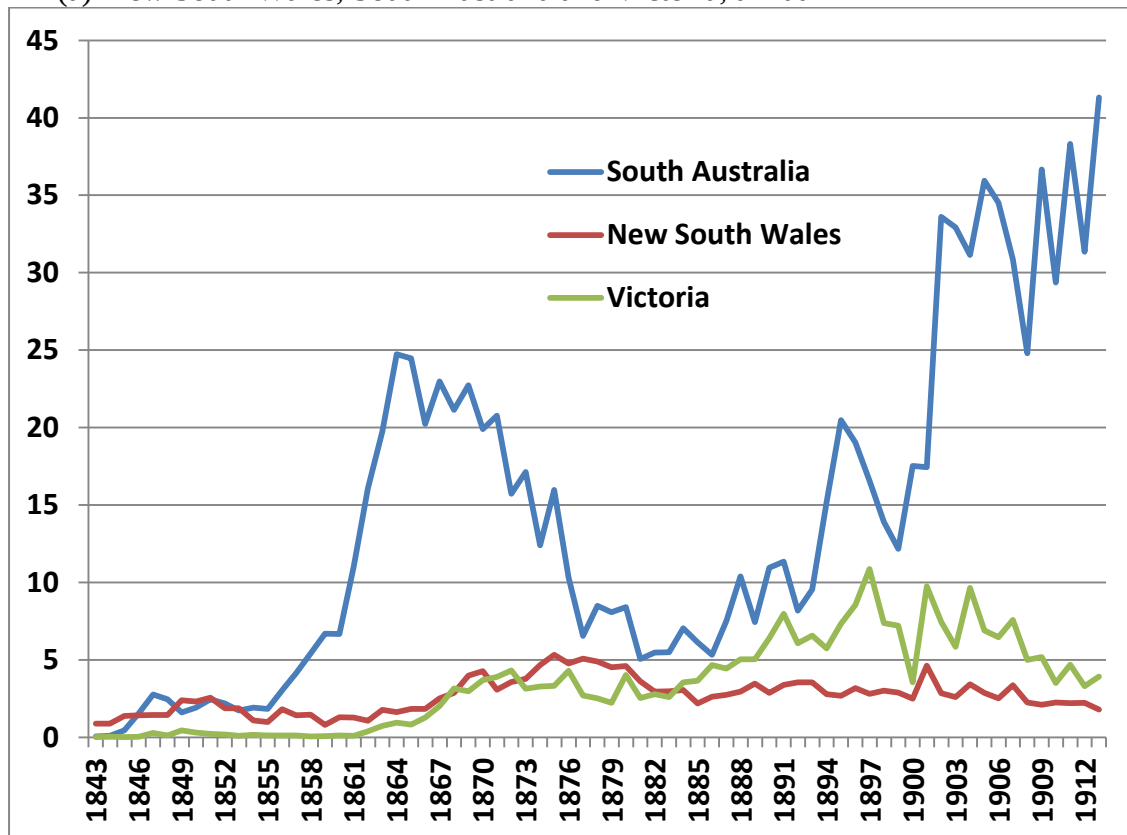


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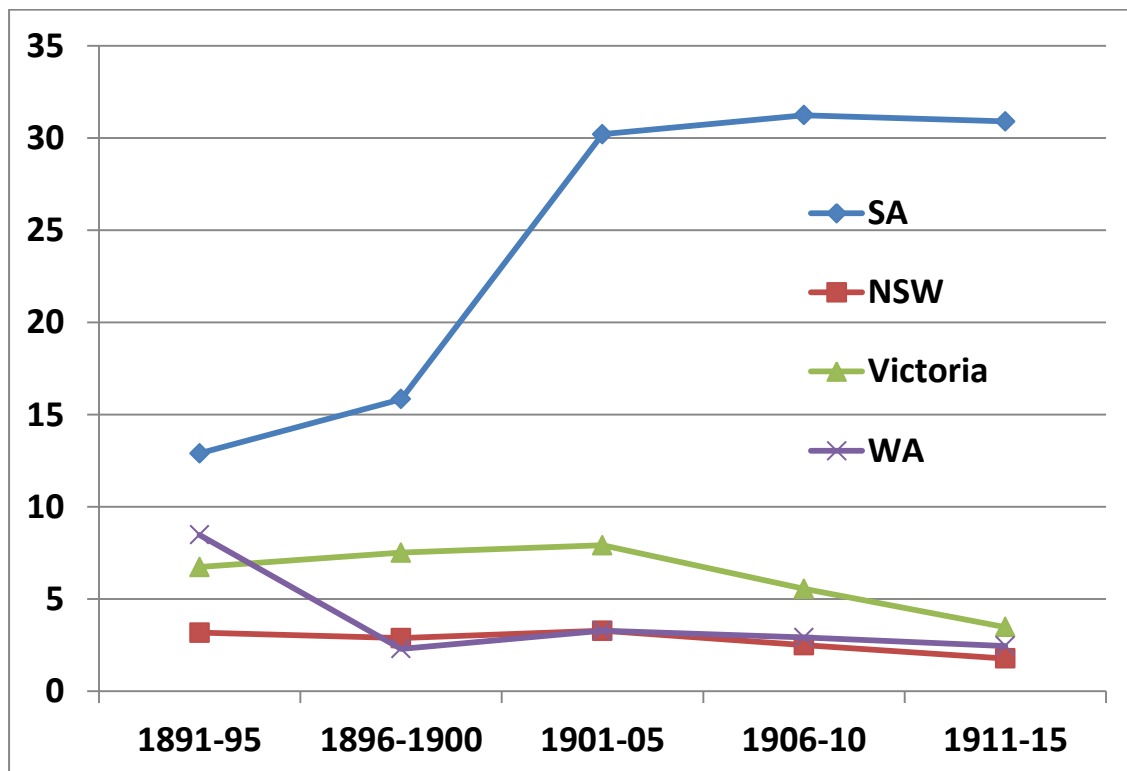


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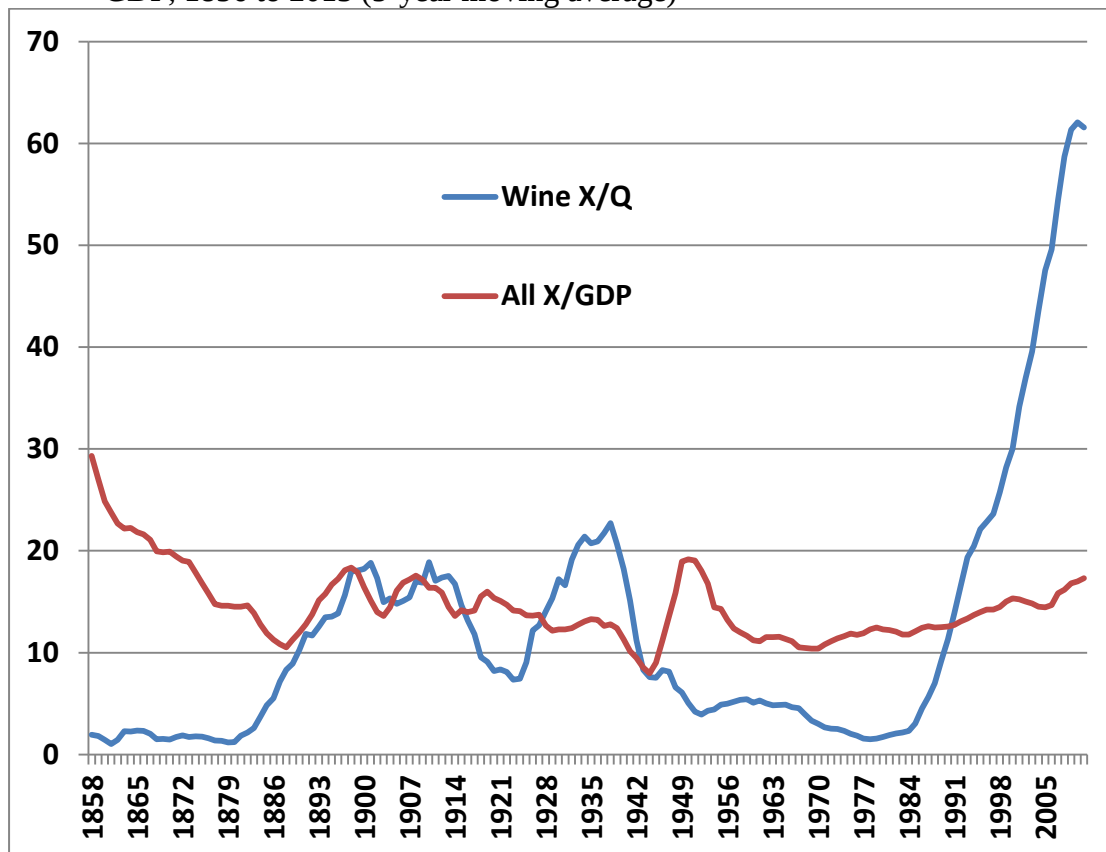
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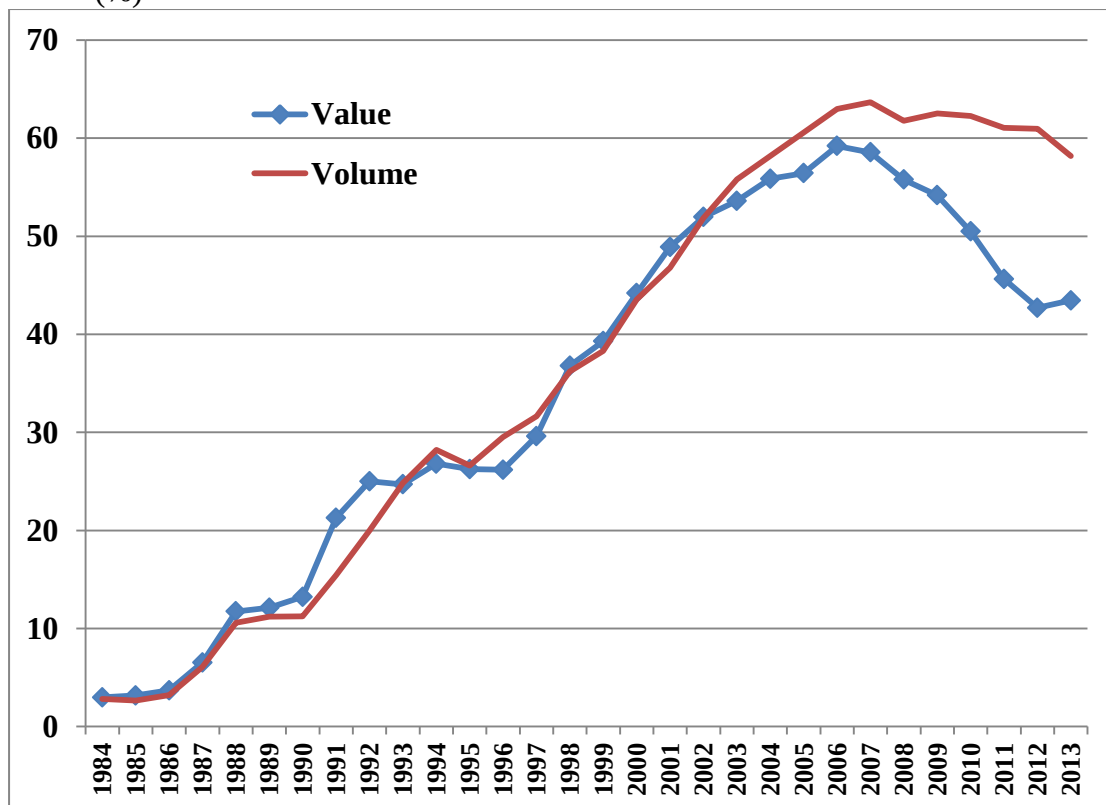
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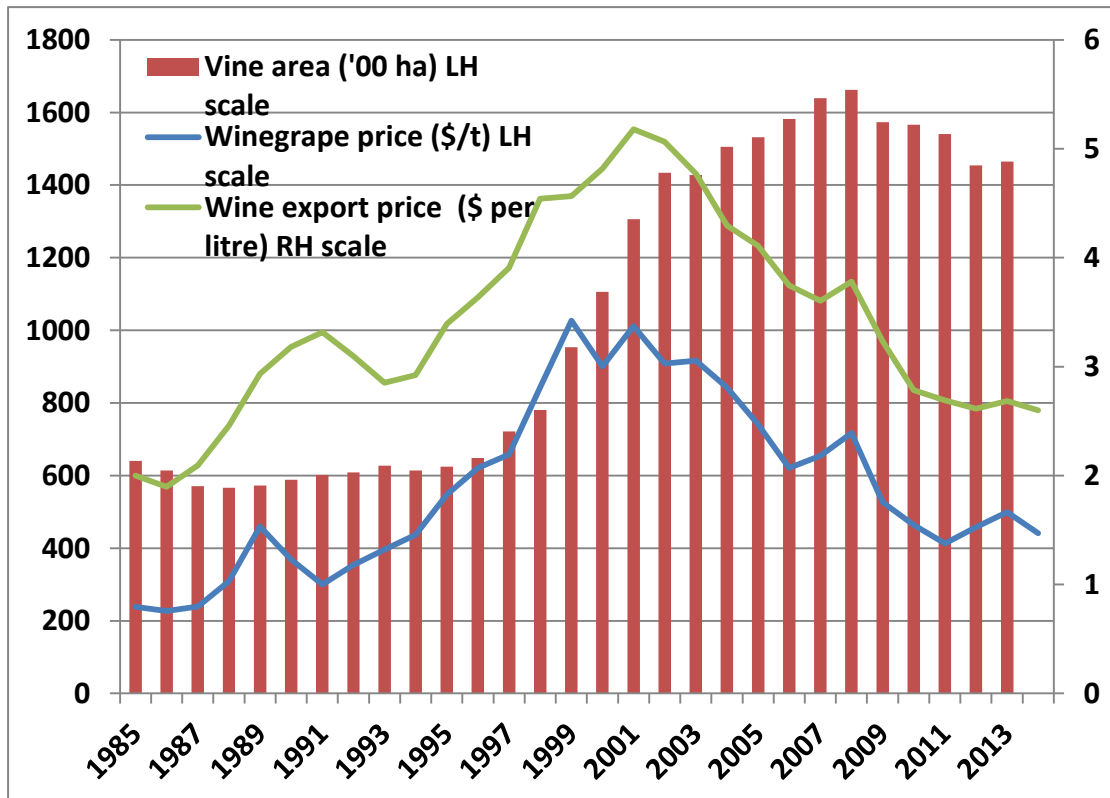
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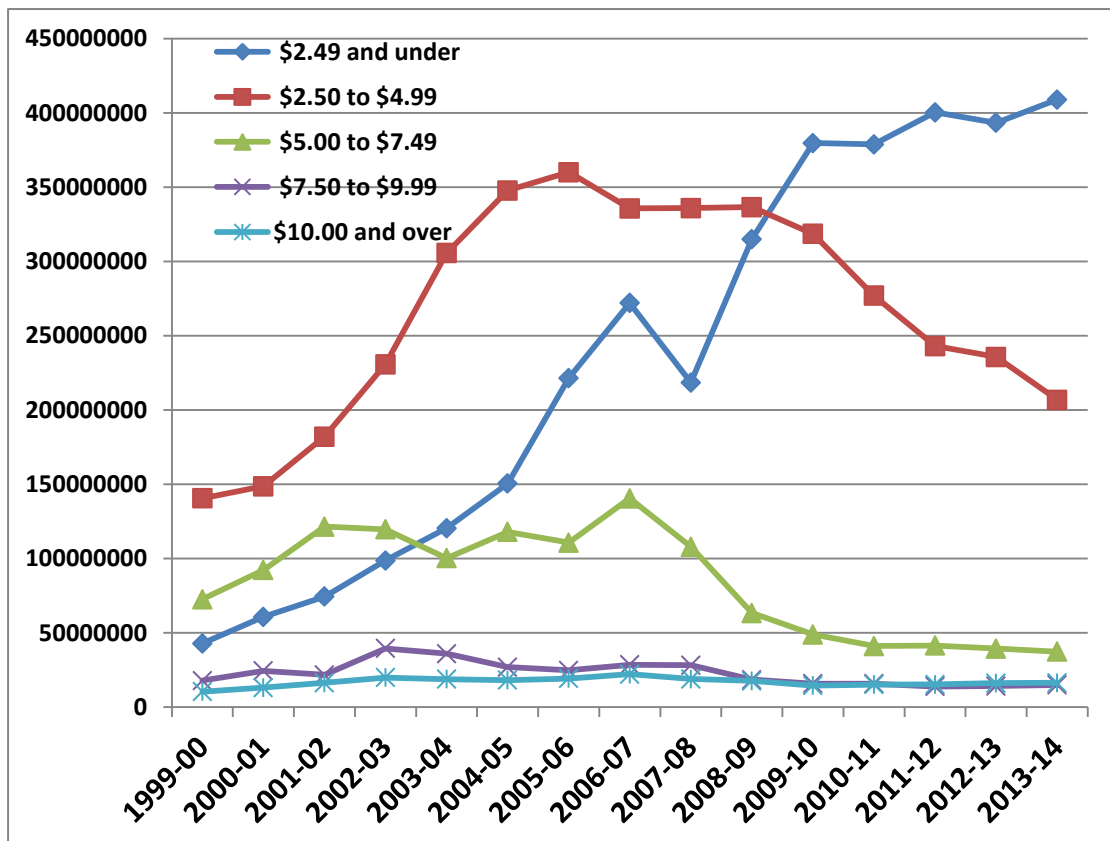
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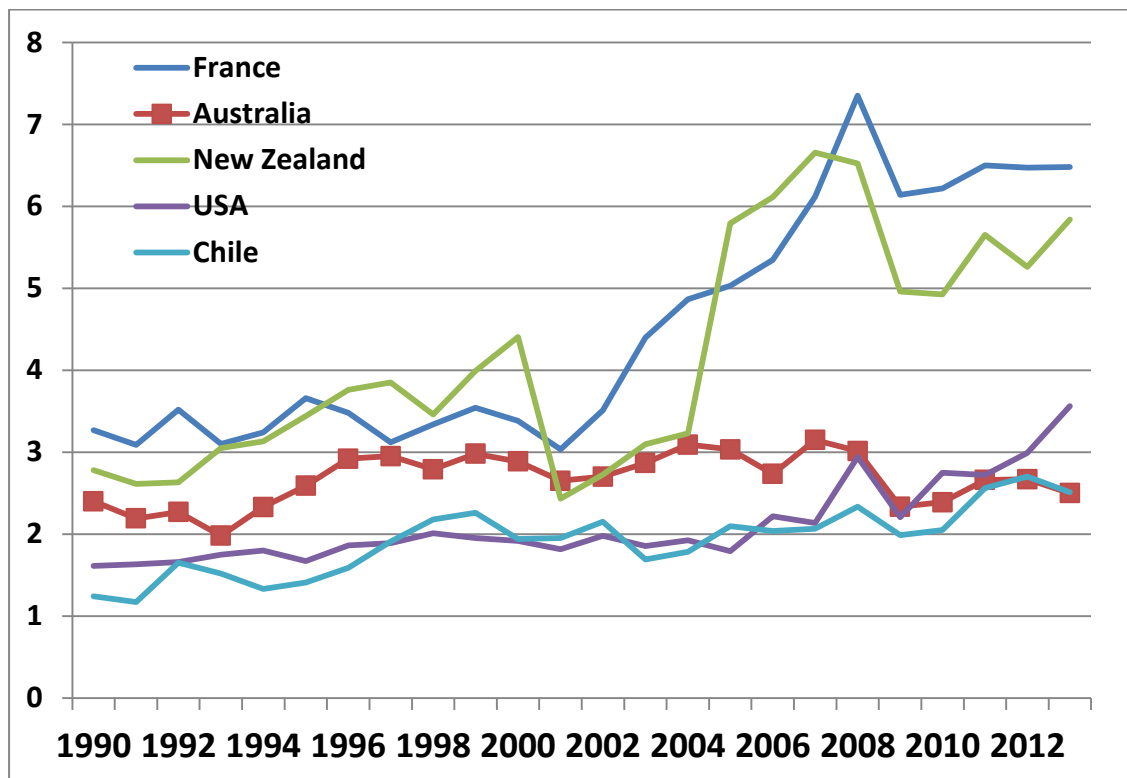
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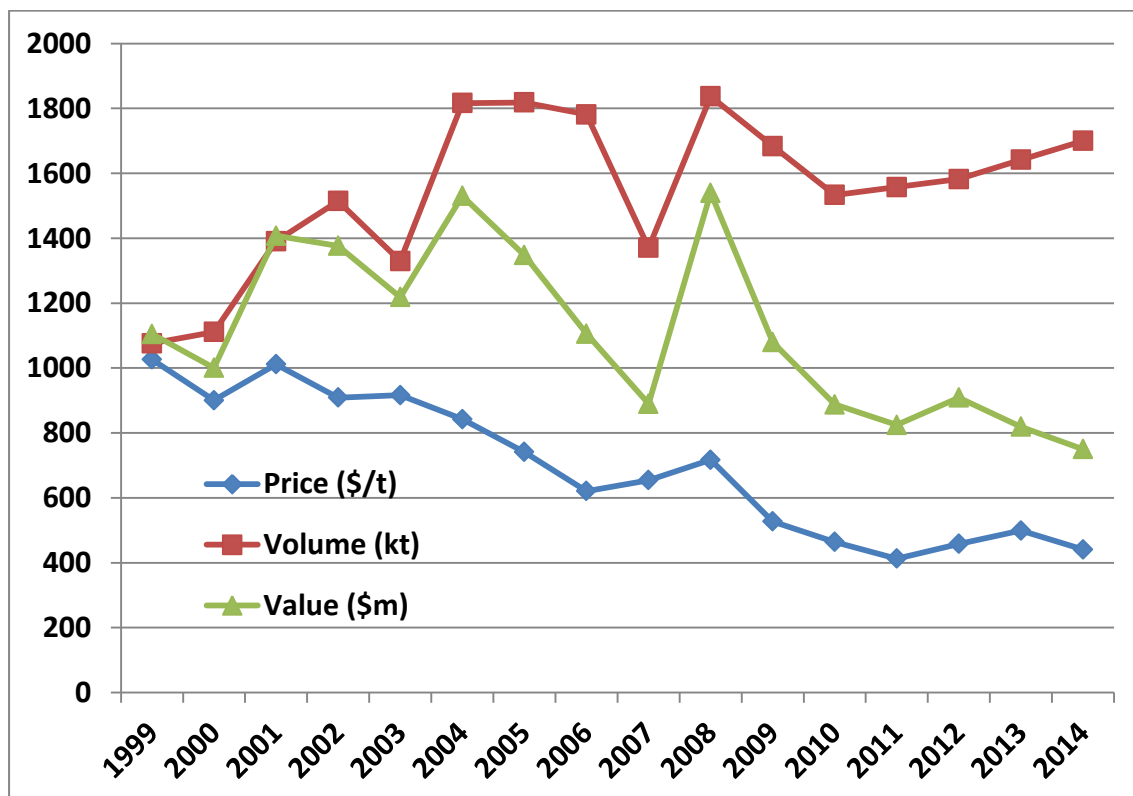
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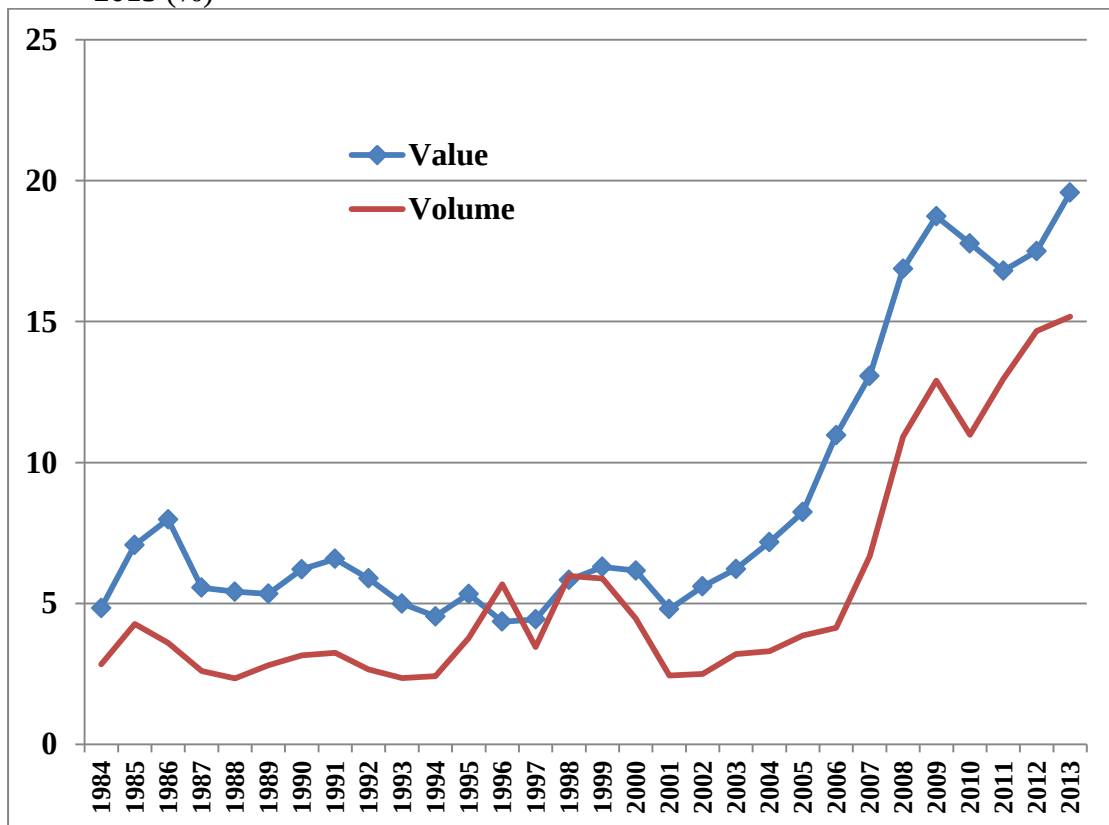
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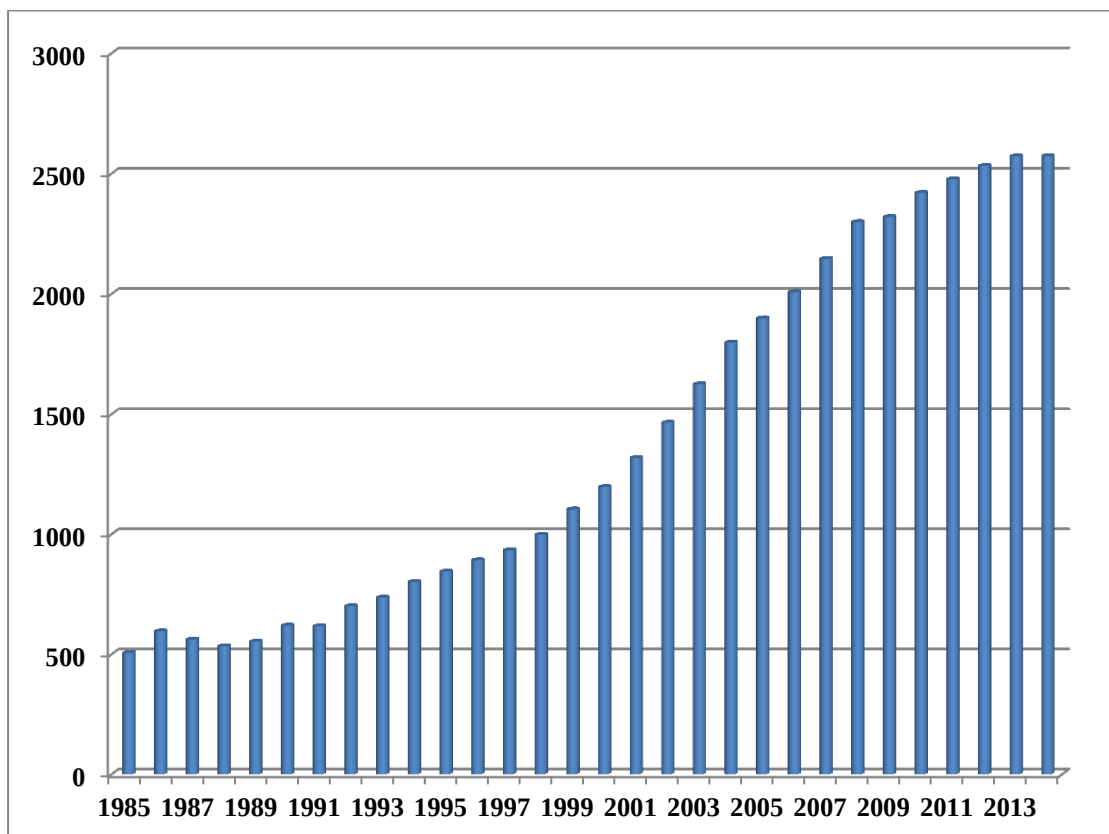
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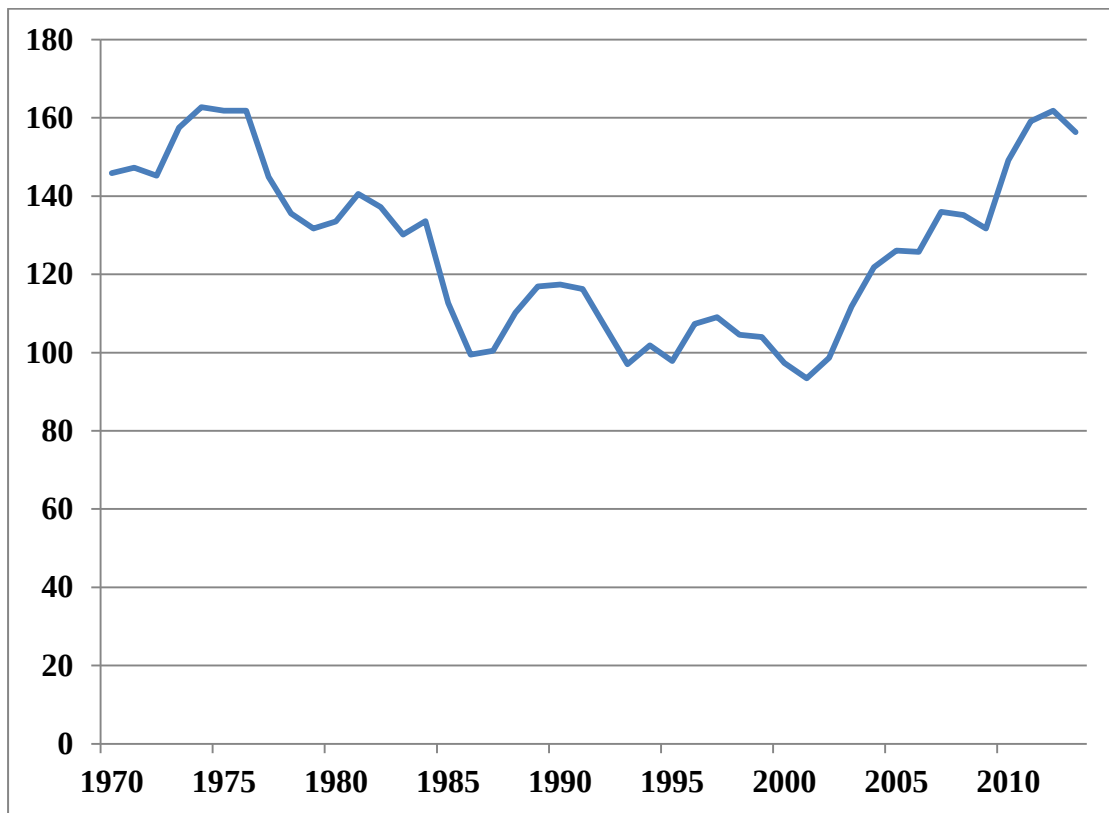


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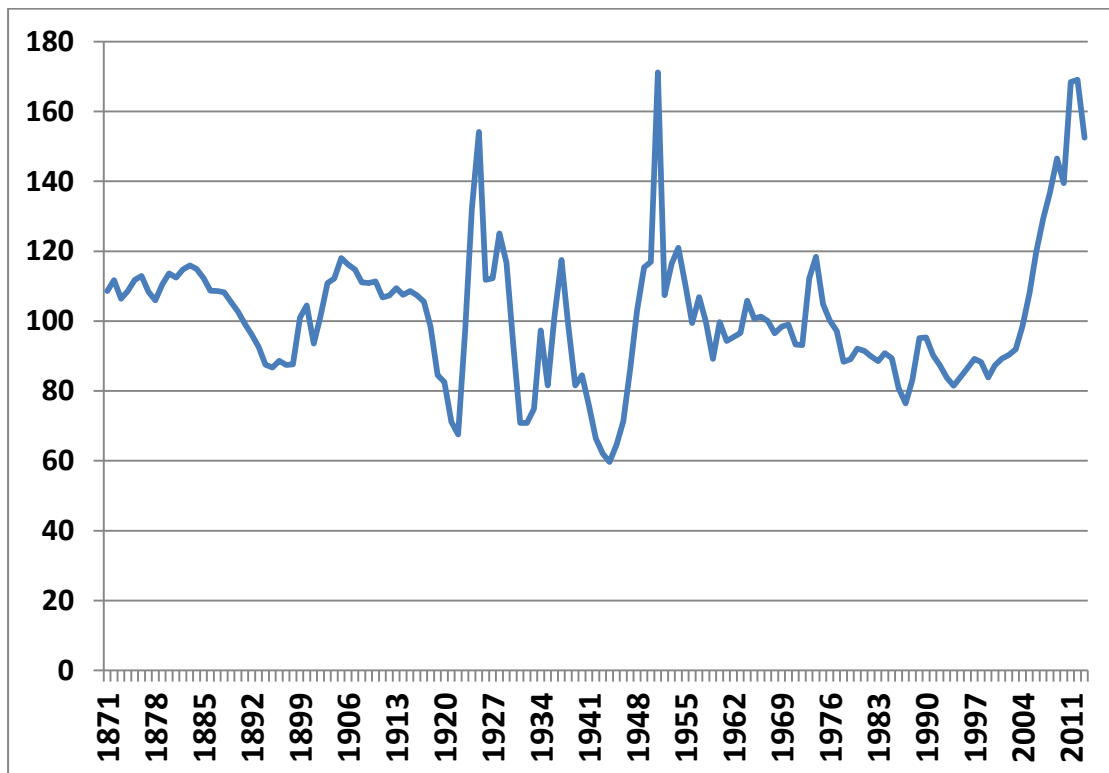


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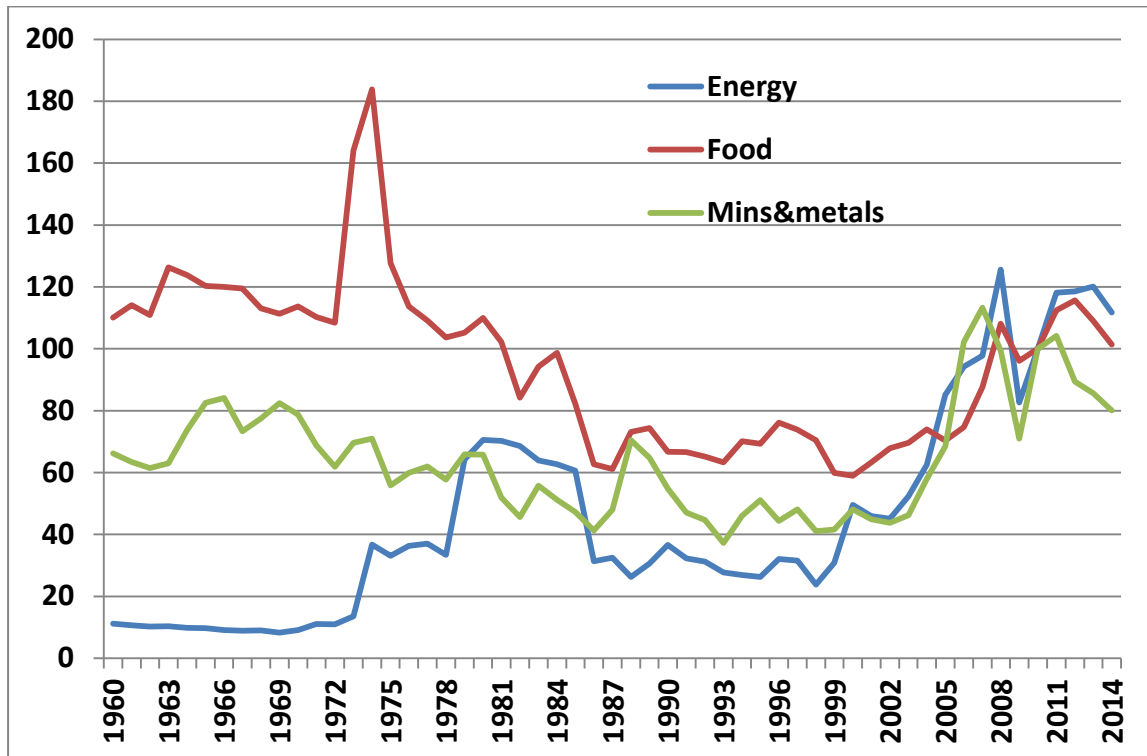
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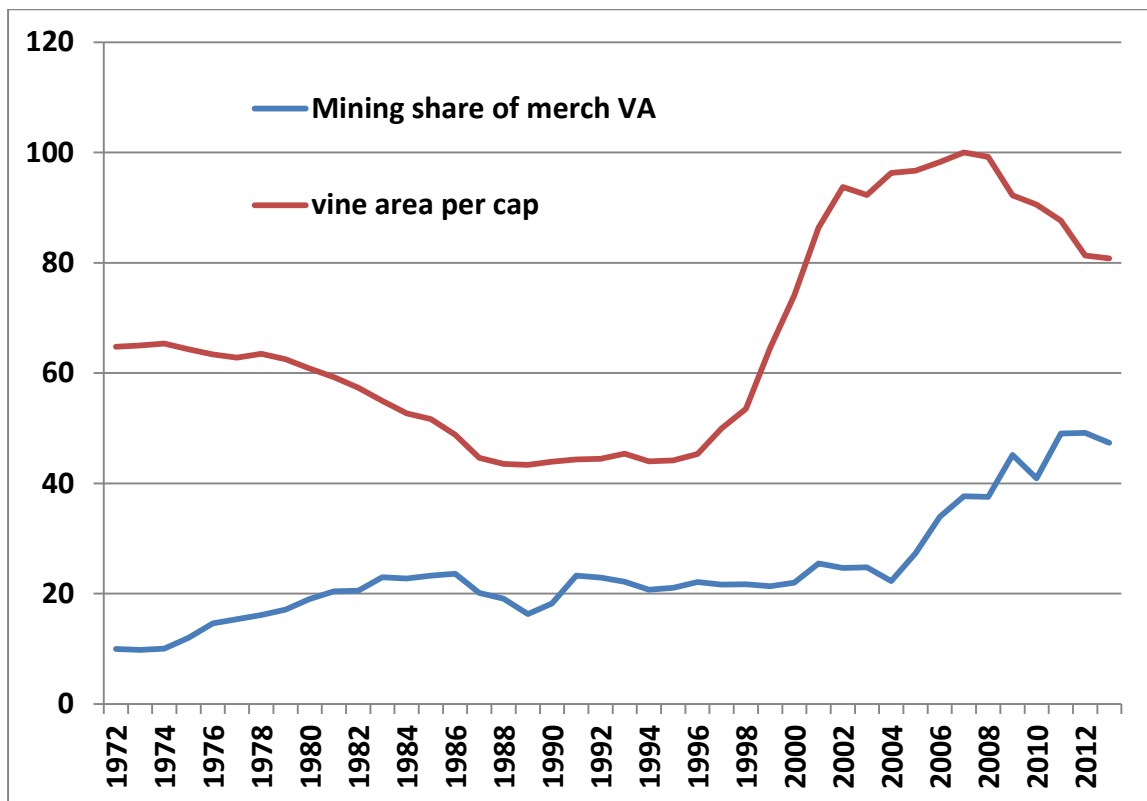
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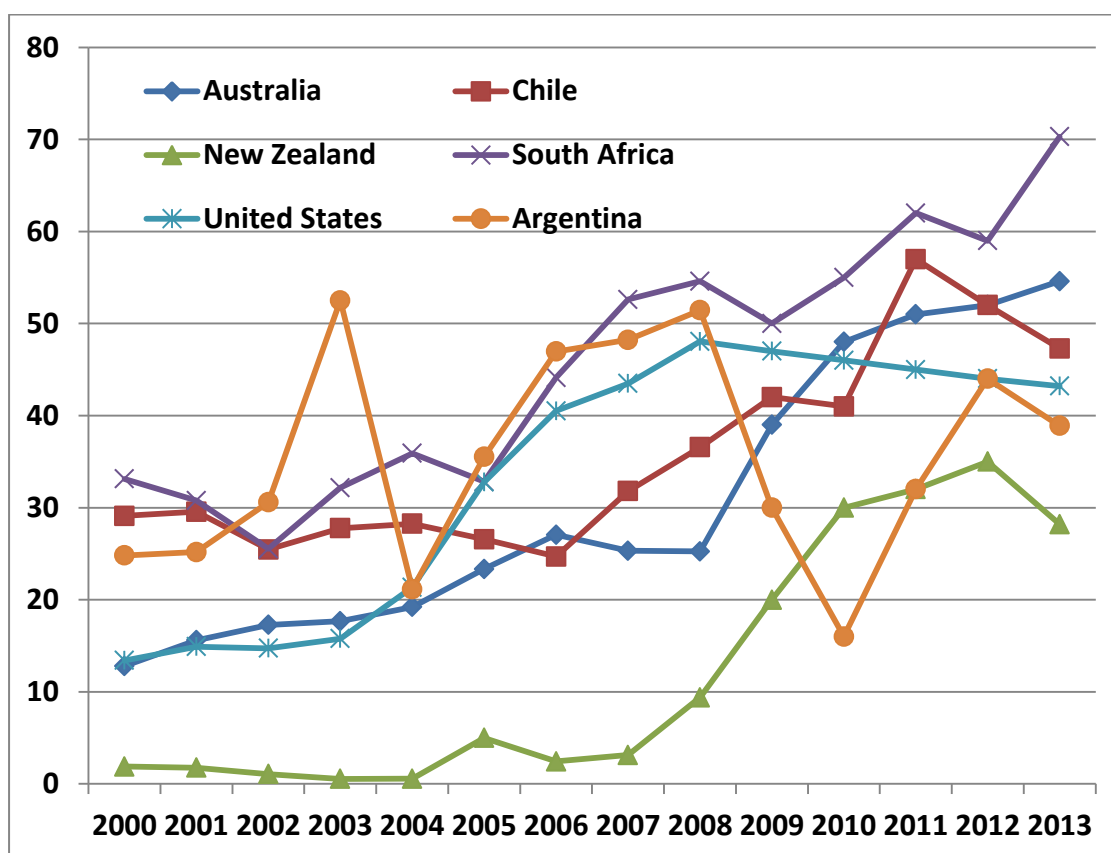
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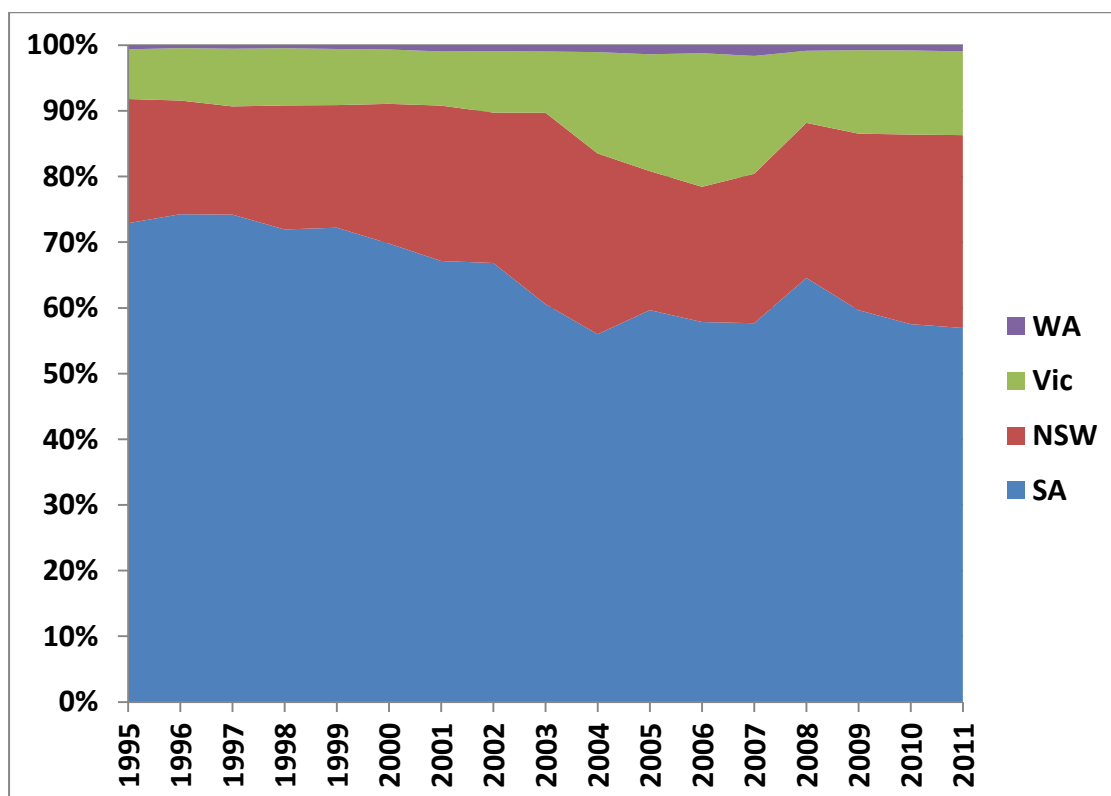
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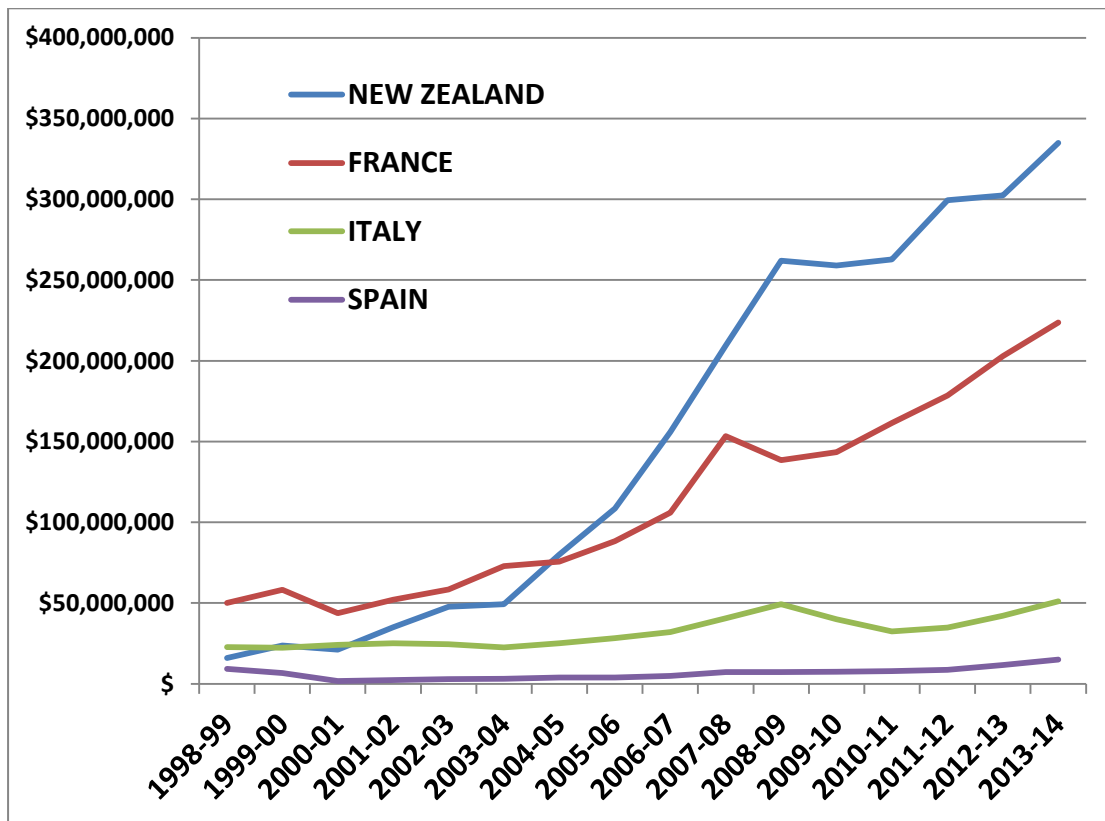
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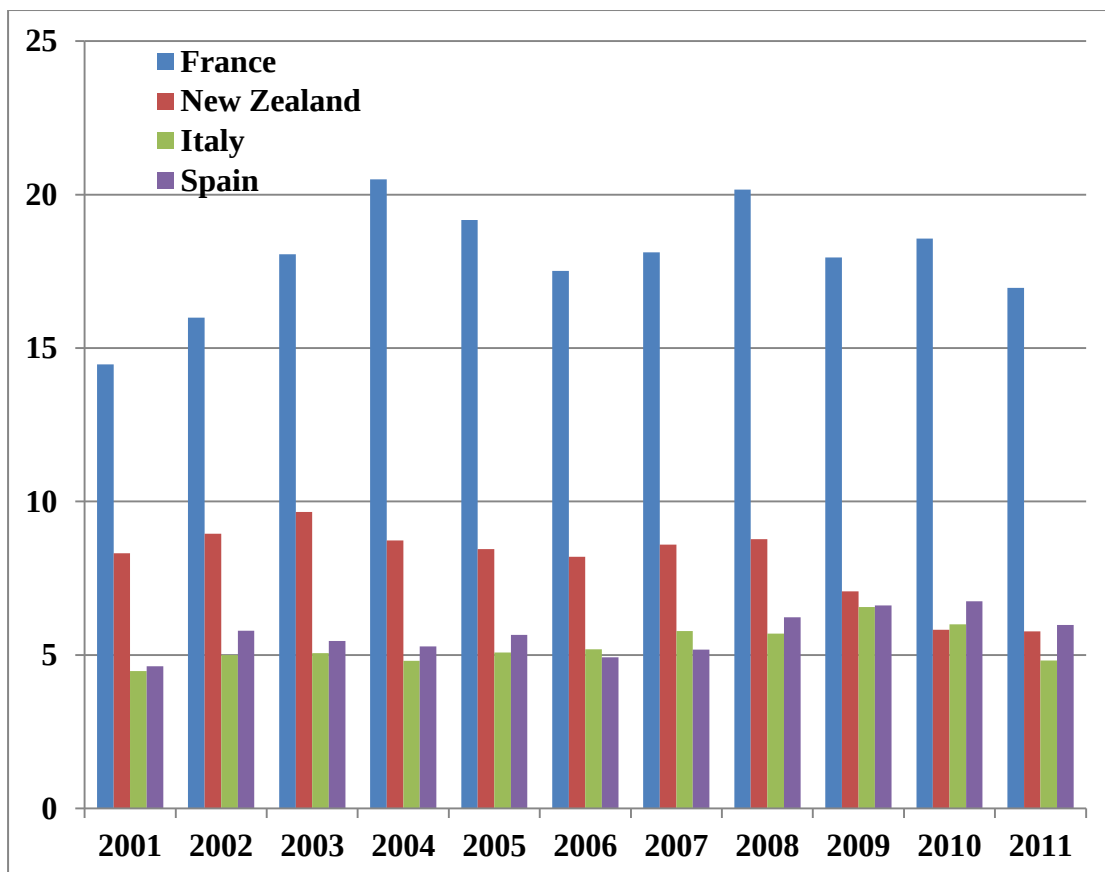
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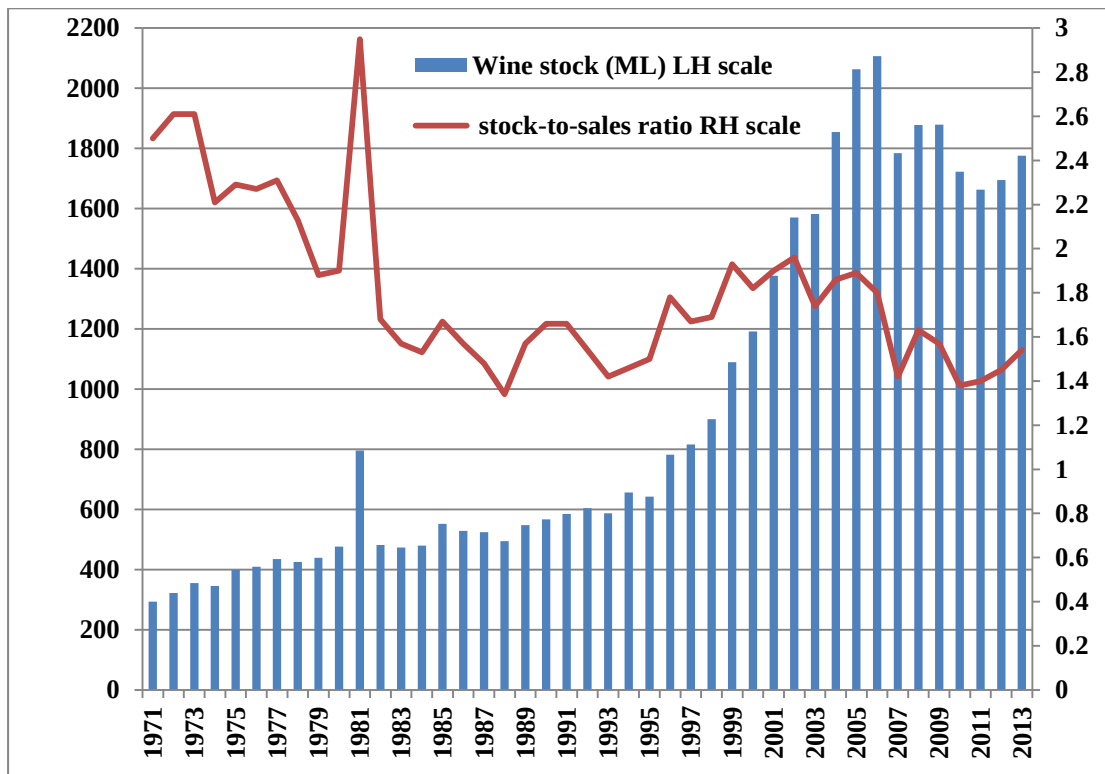
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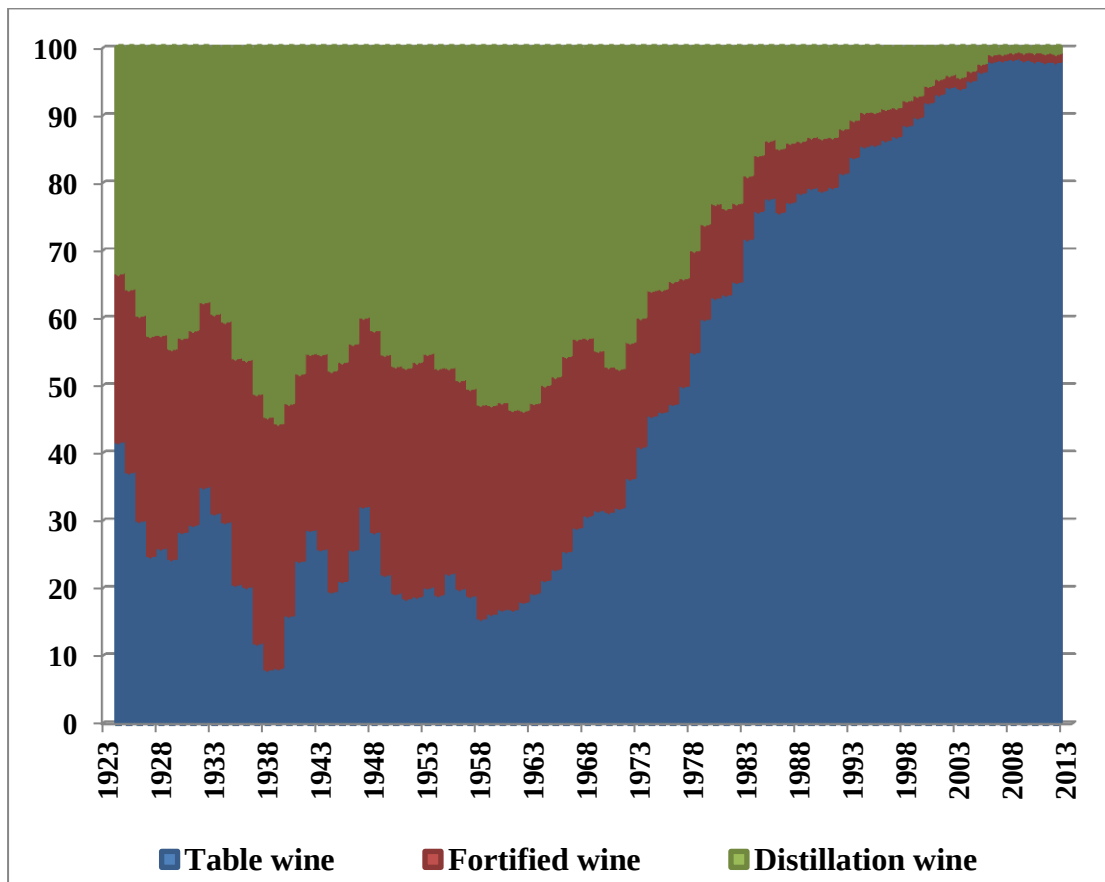
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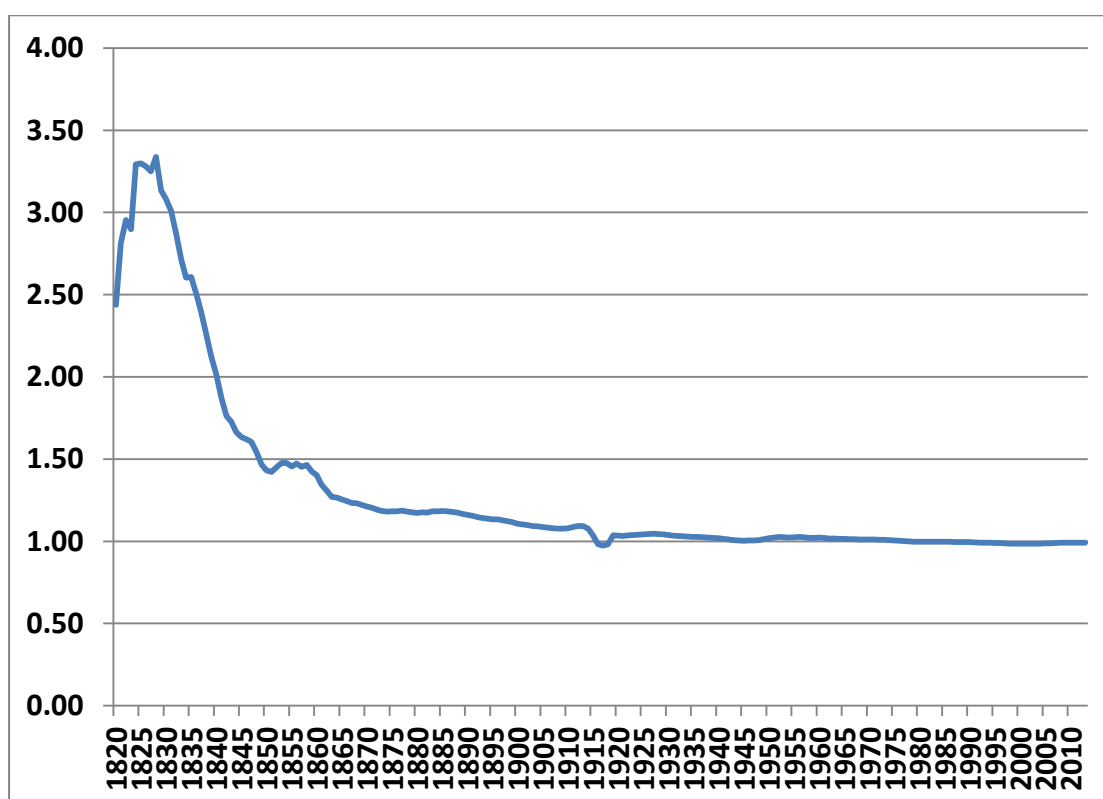
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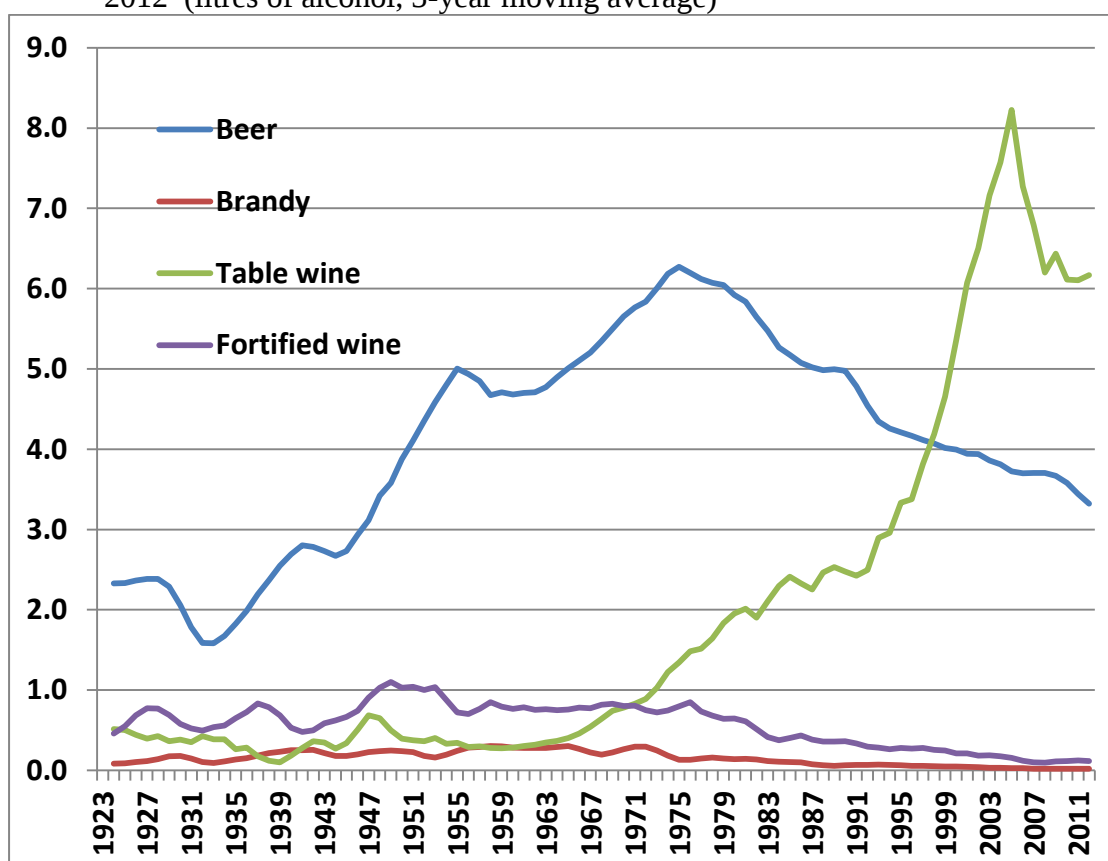
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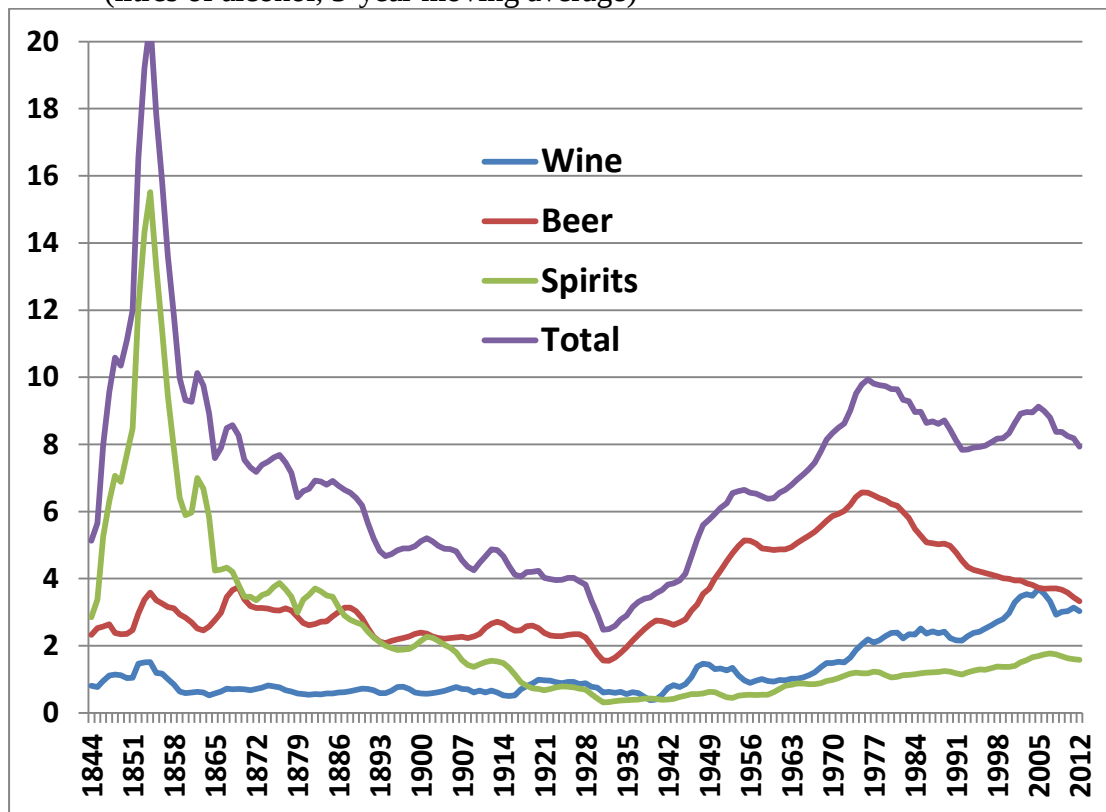
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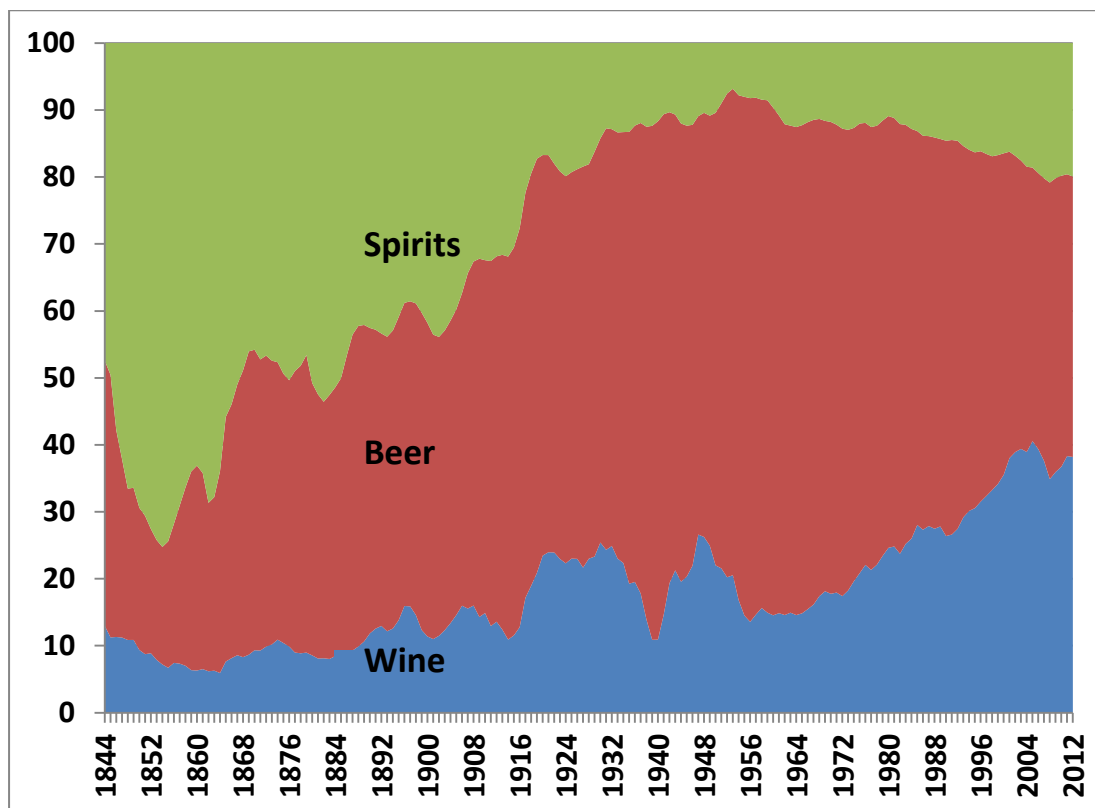
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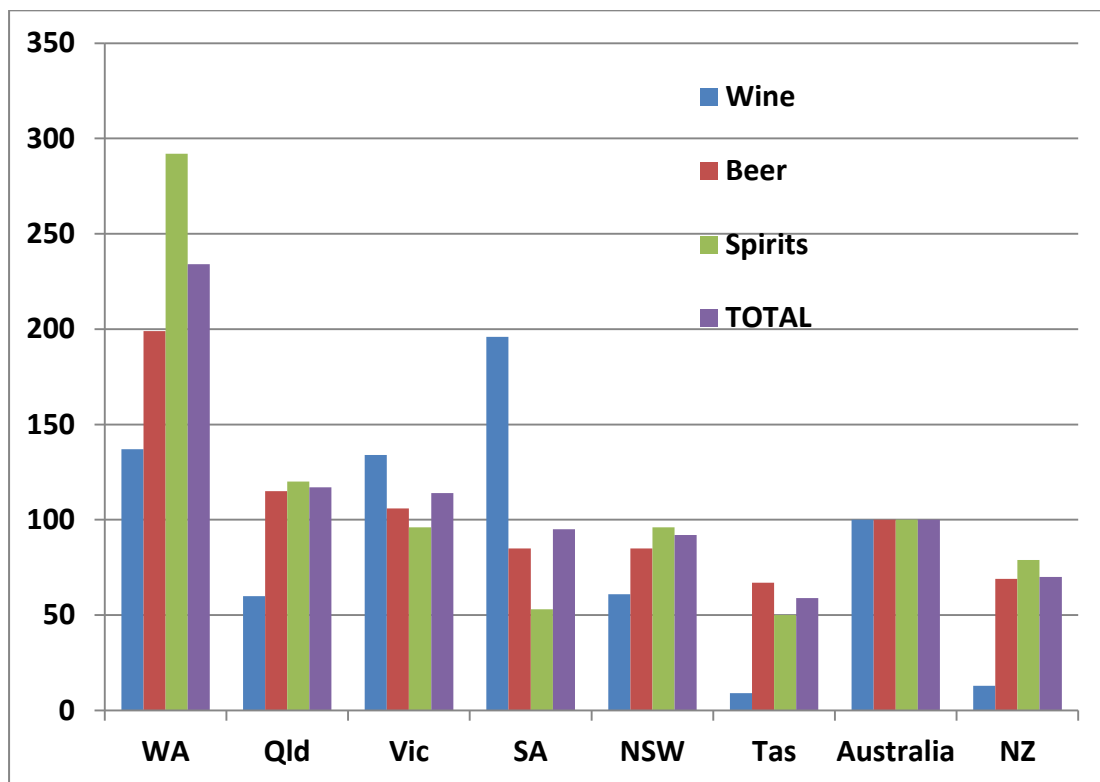


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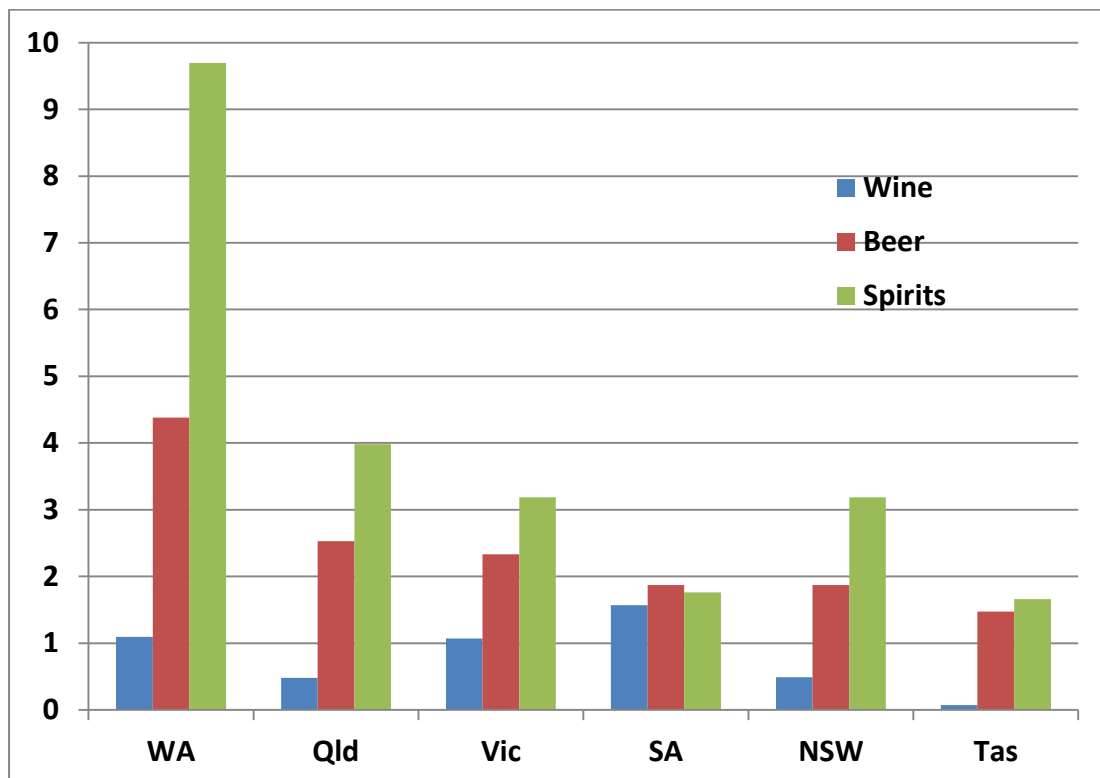


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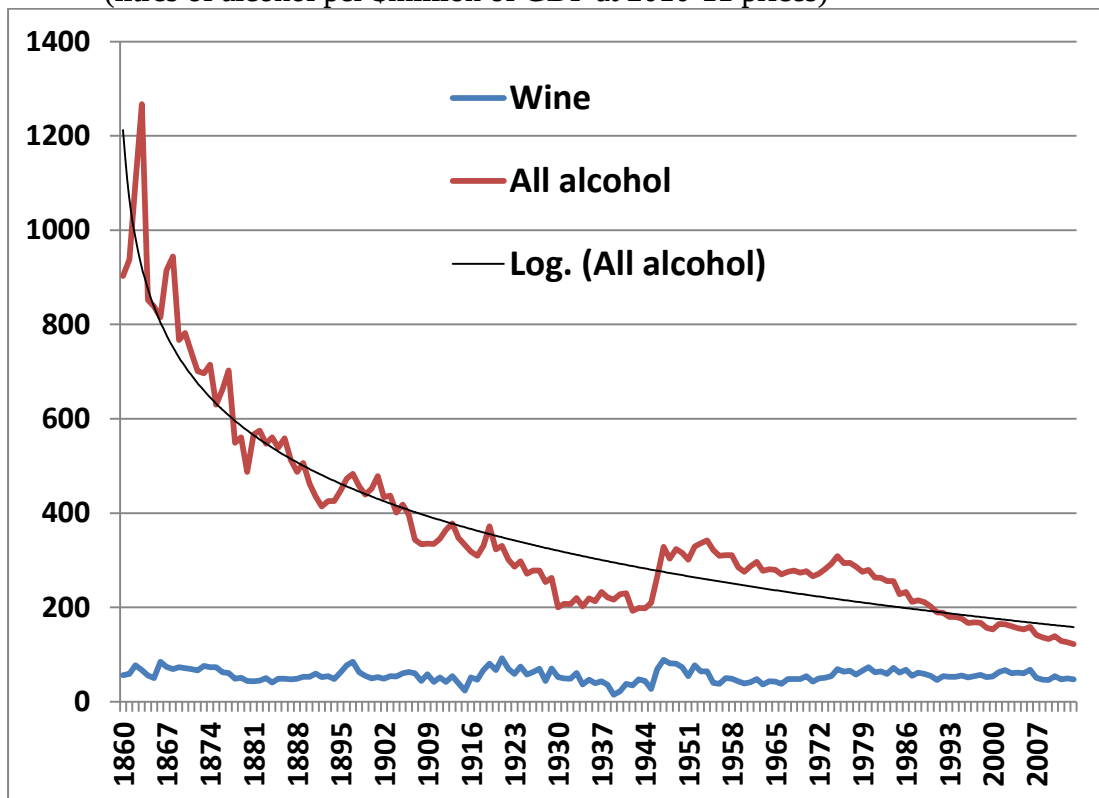
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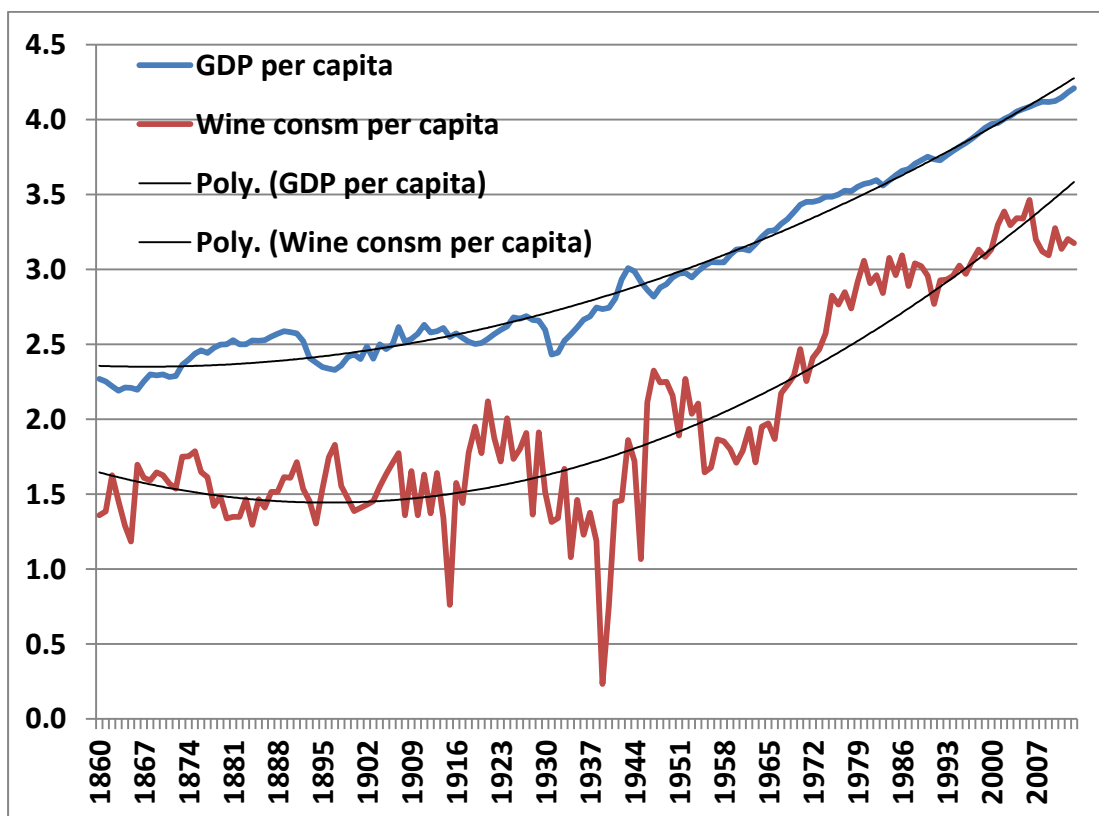
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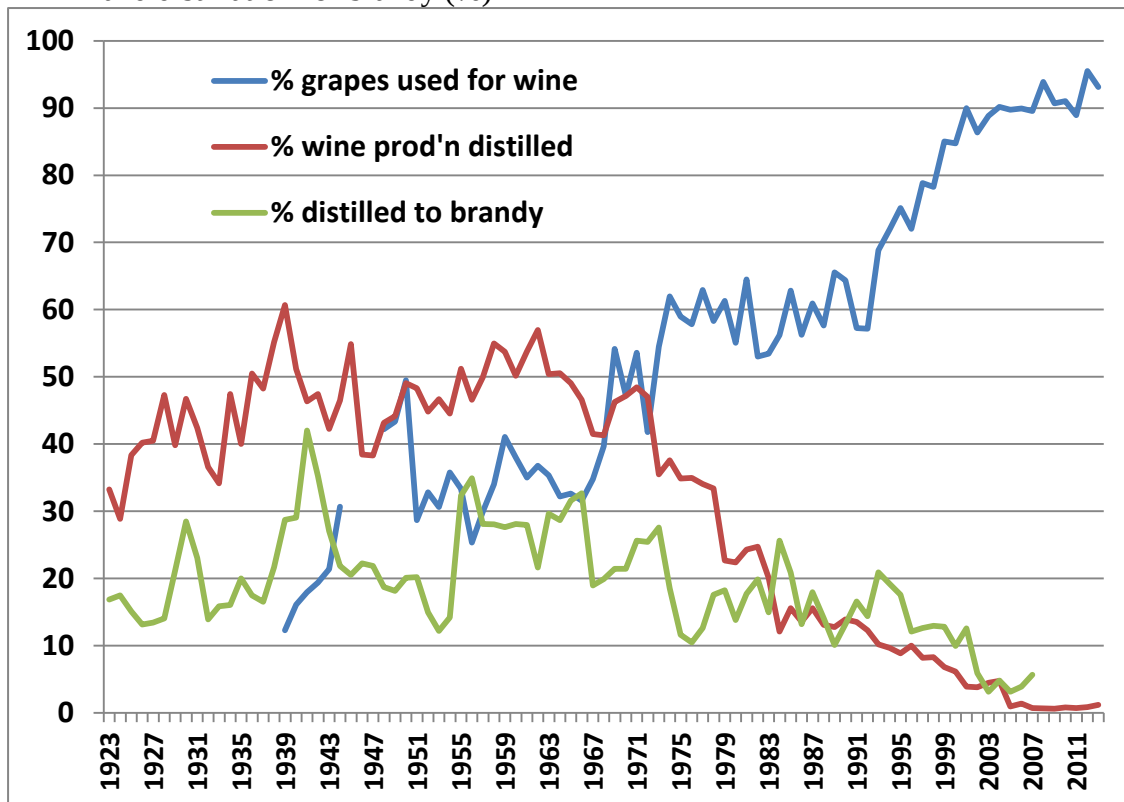


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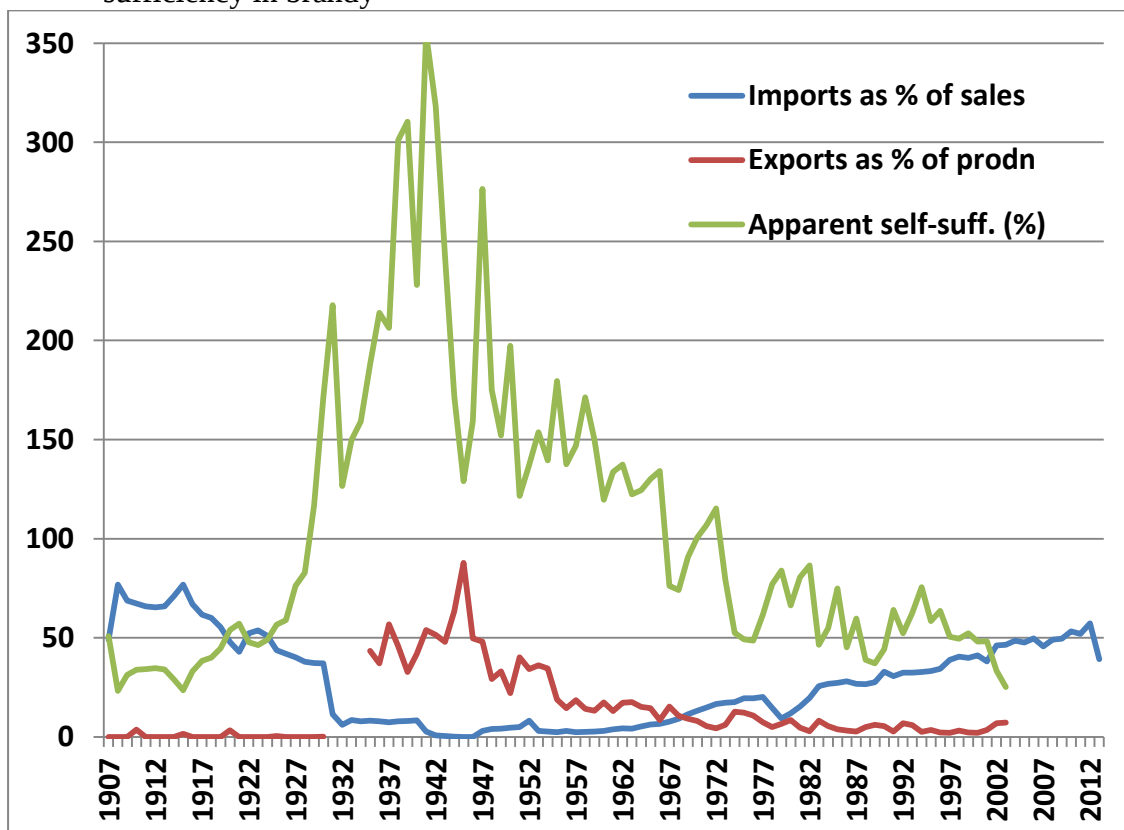


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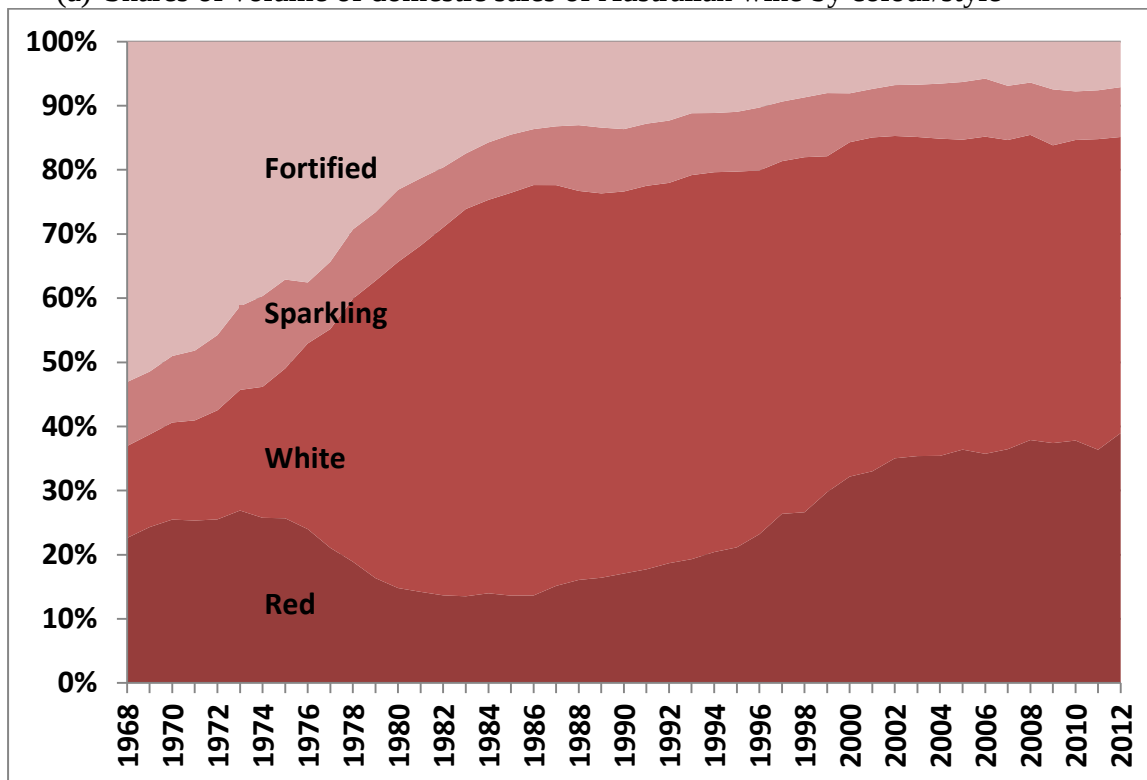


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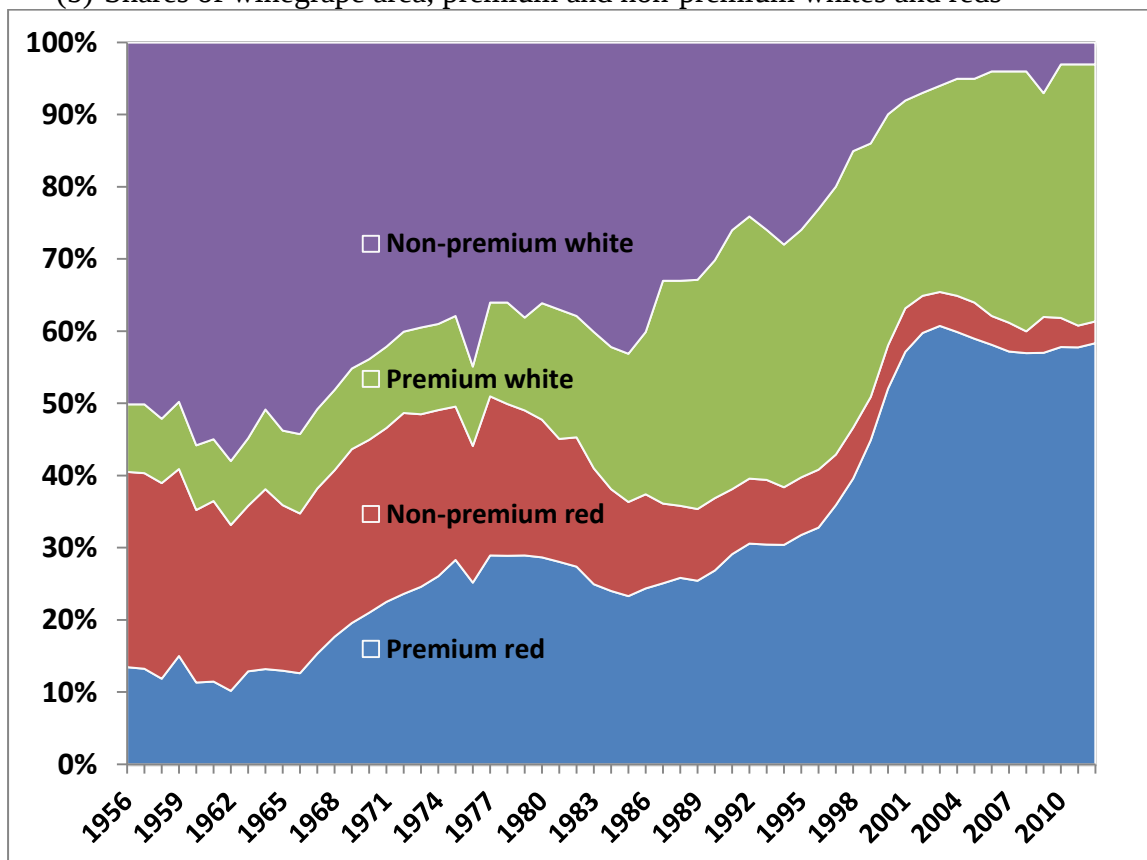


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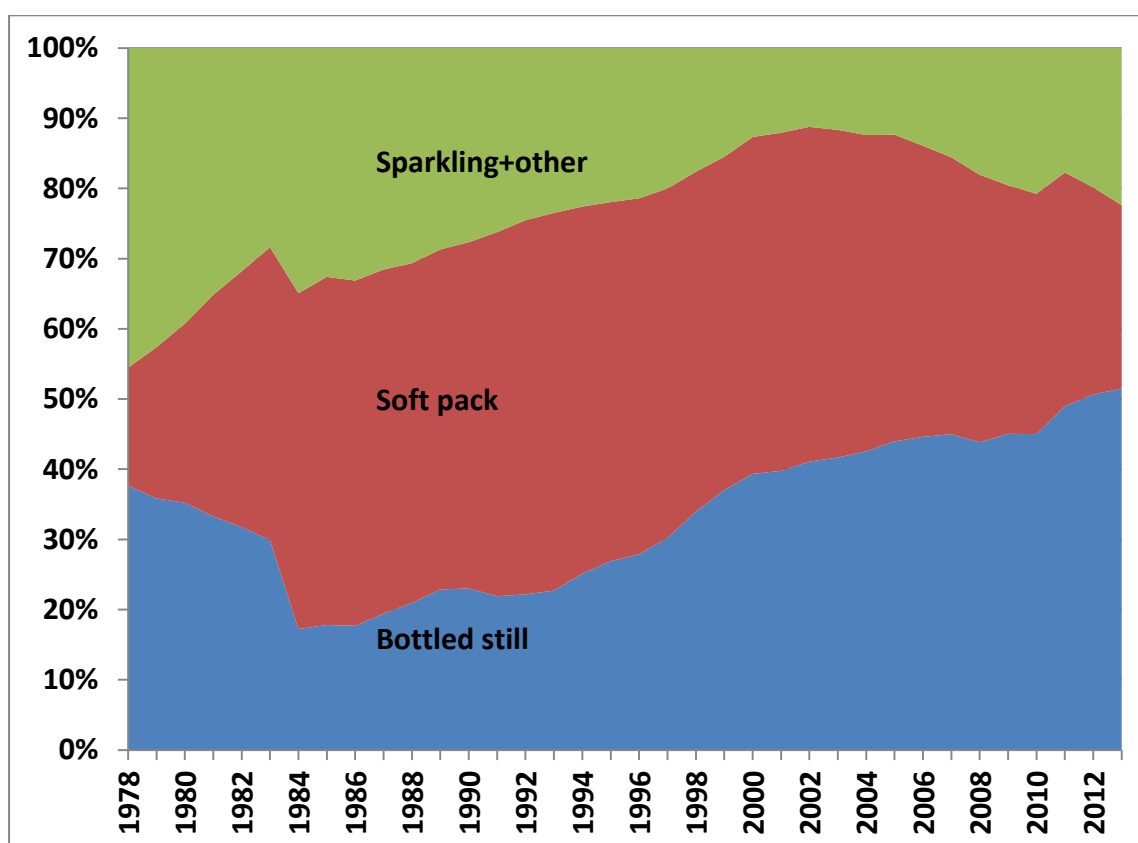
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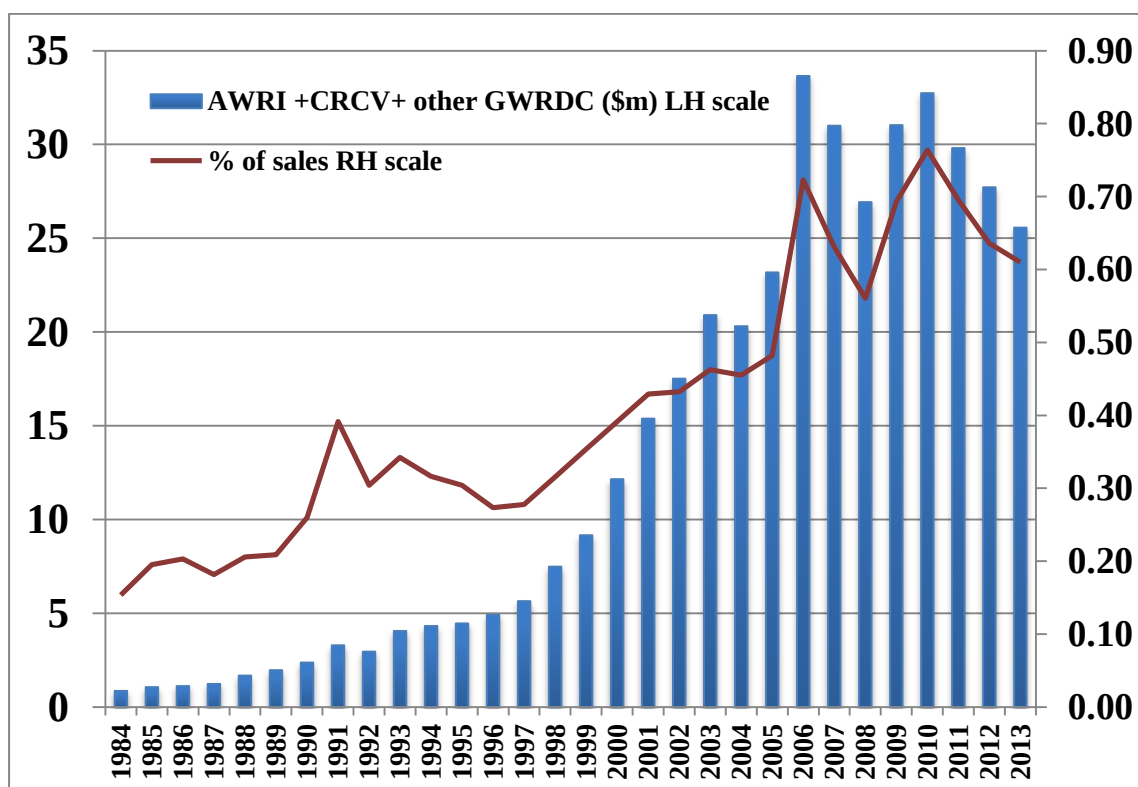
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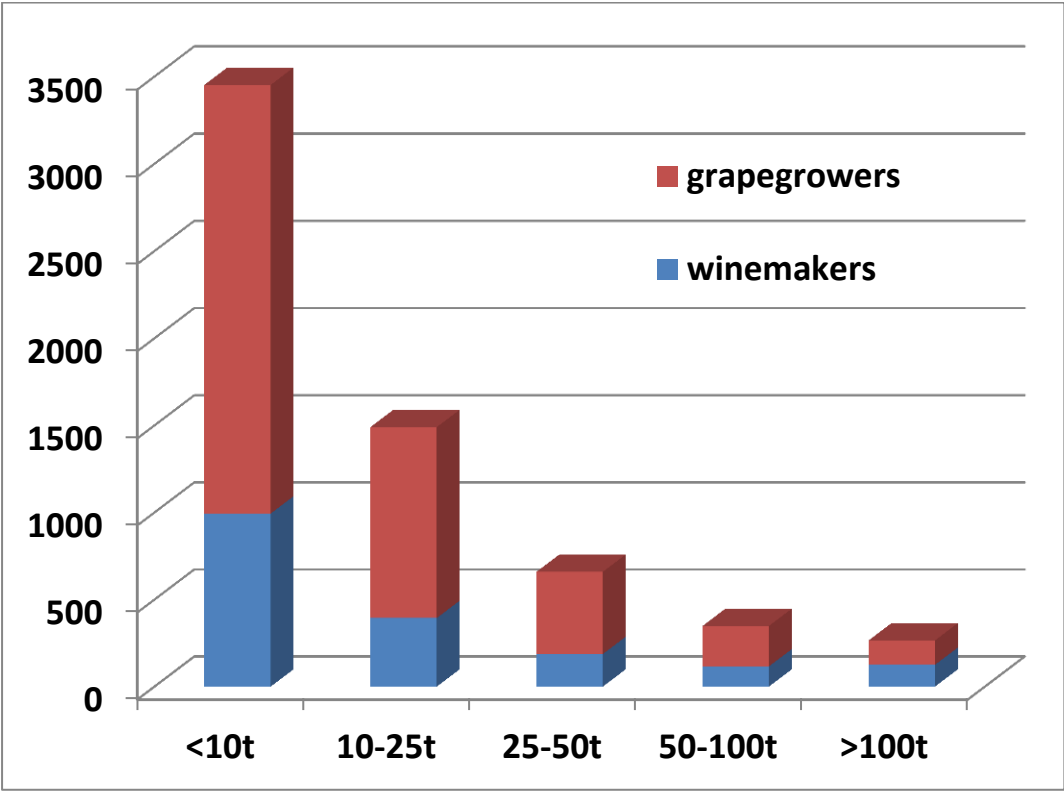


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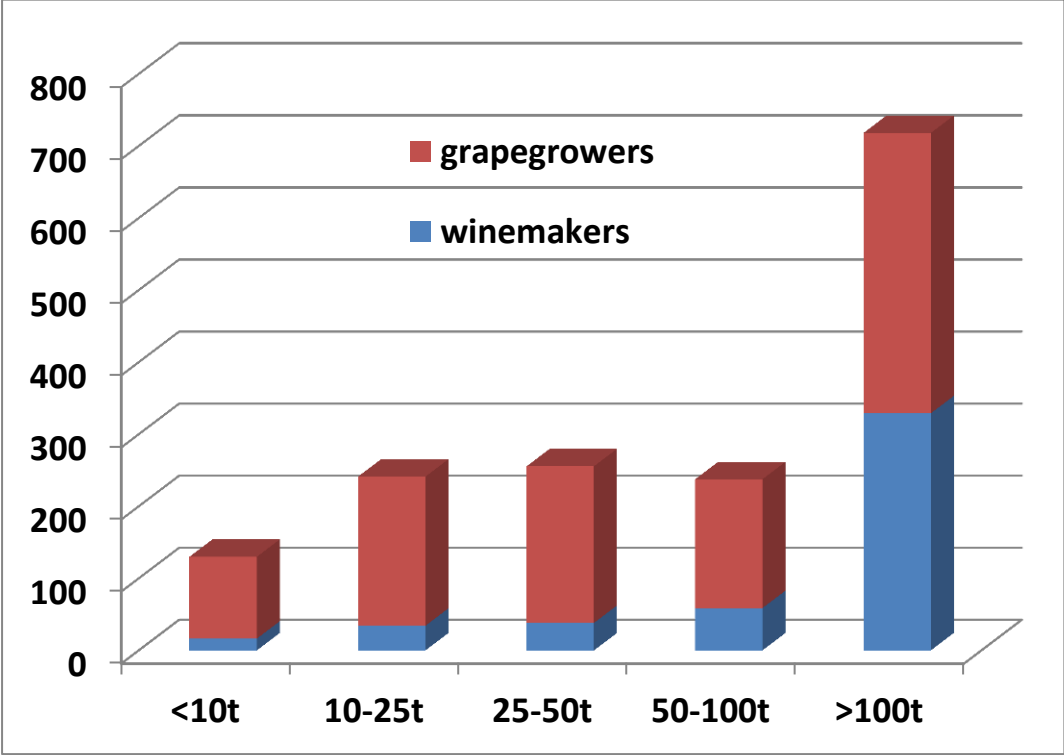


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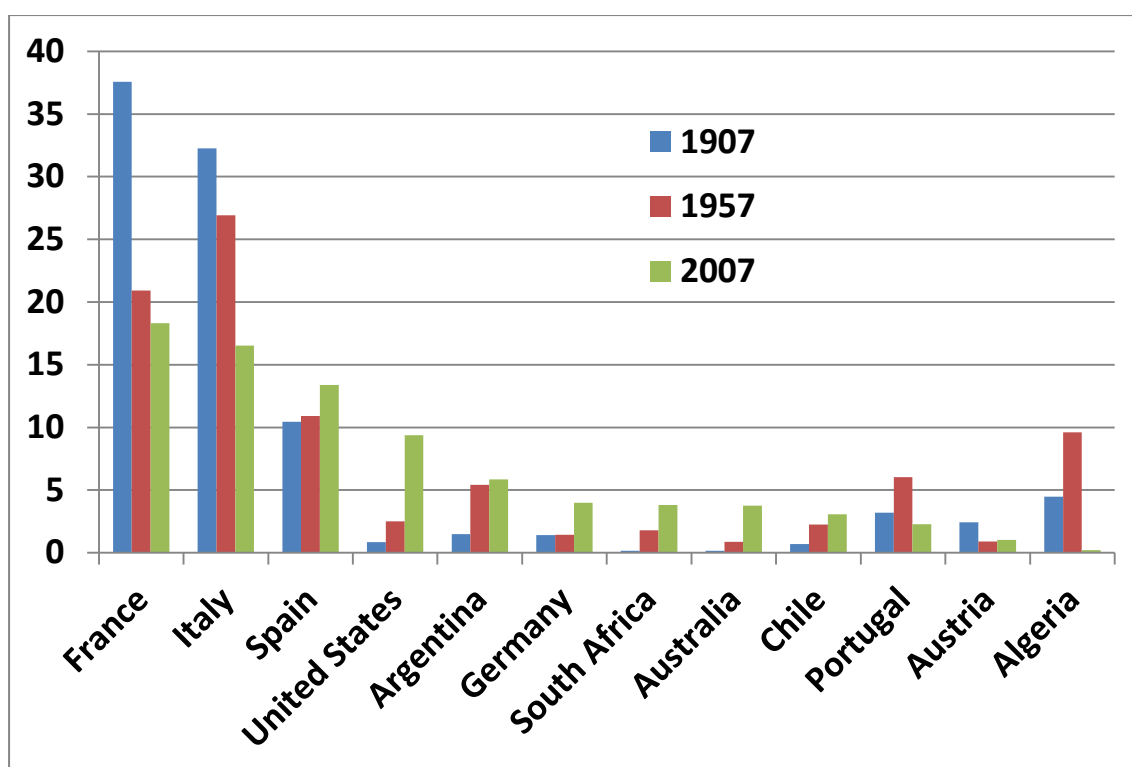
(a) Number of producers



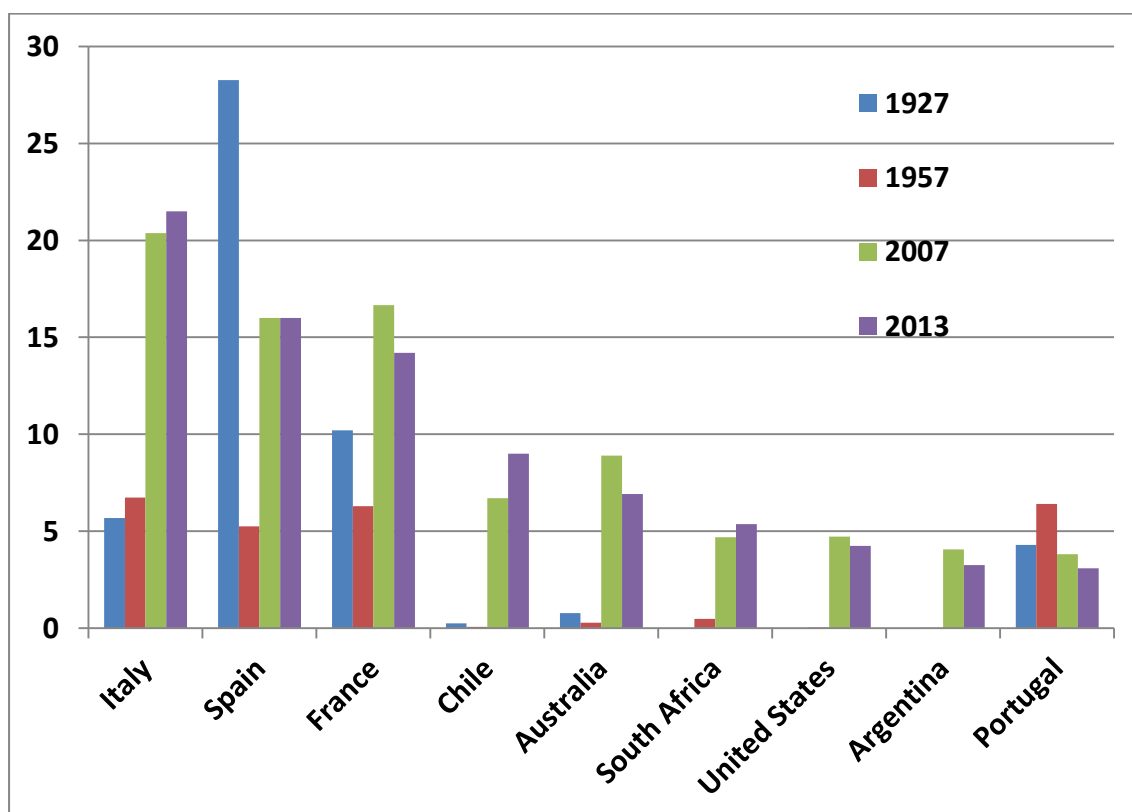
(b) Winegrape production (kt of grapes crushed)



44. National shares of global wine production volume, 1907 to 2007 (%)



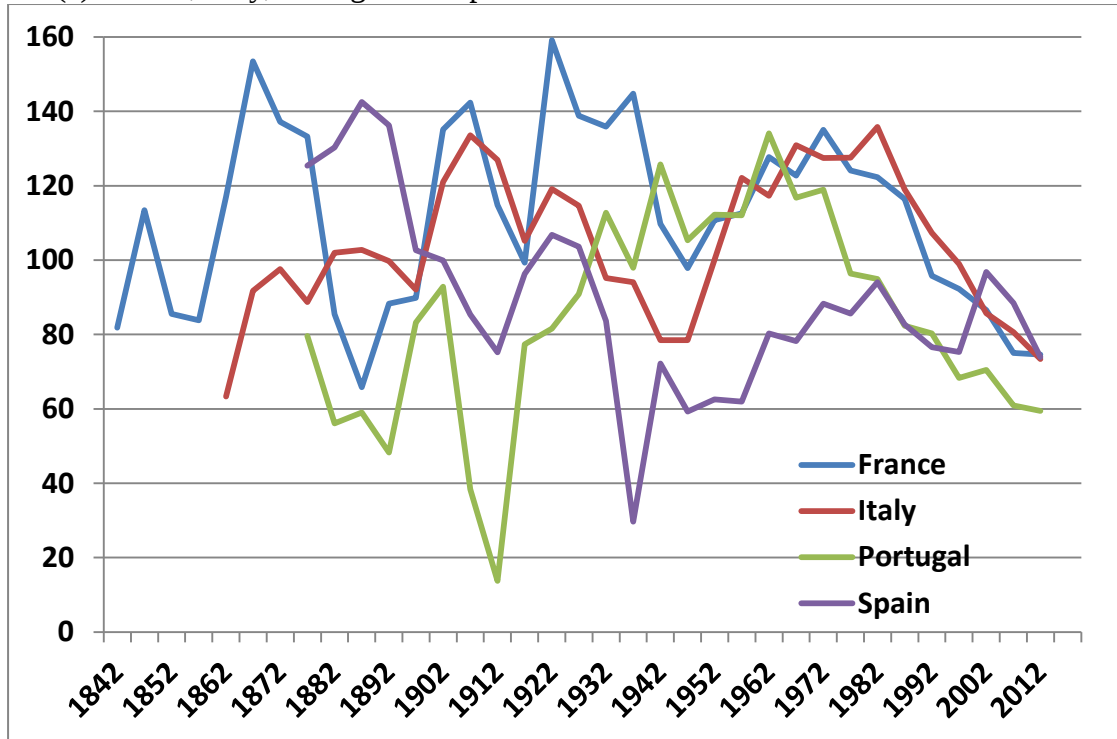
45. National shares of global wine export volumes, 1927 to 2013 (%)



^a Algeria is not shown: its shares were 57% in 1907, 40% in 1957 and 0% in 2007 and 2013

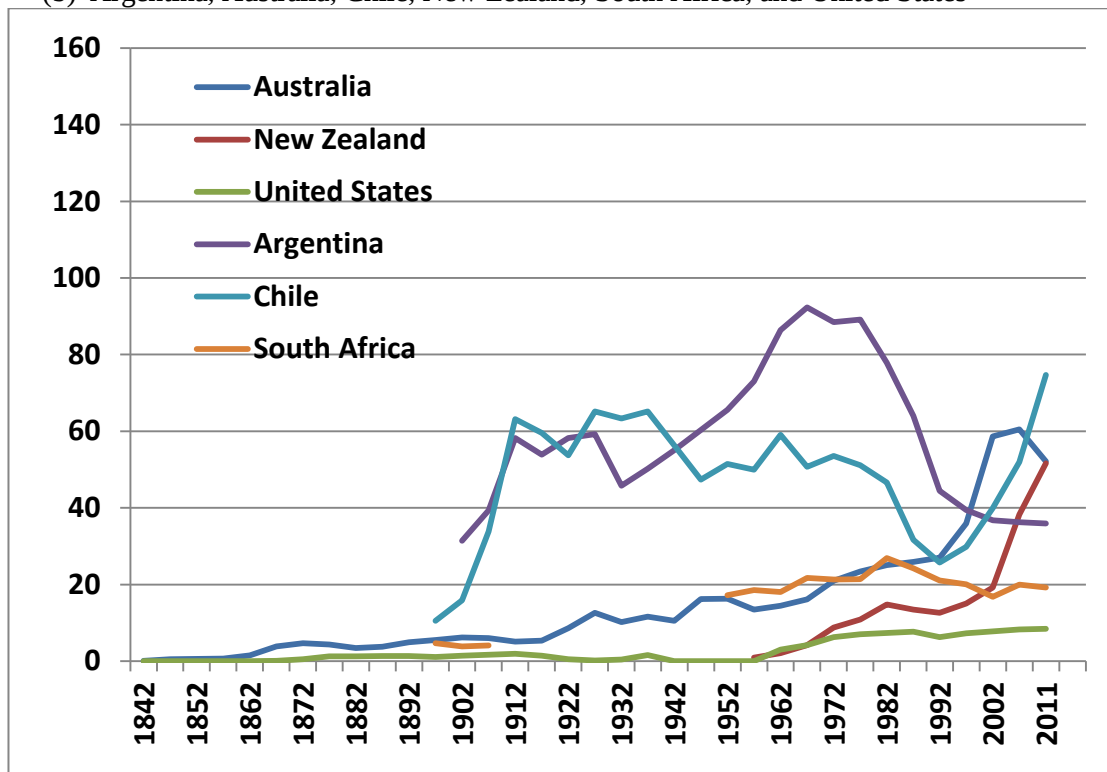
46. Wine production per capita, main Old and New World countries, 1840 to 2013
(litres/year, 5-year averages around year shown except '2012' = 2010-13)

(a) France, Italy, Portugal and Spain^a



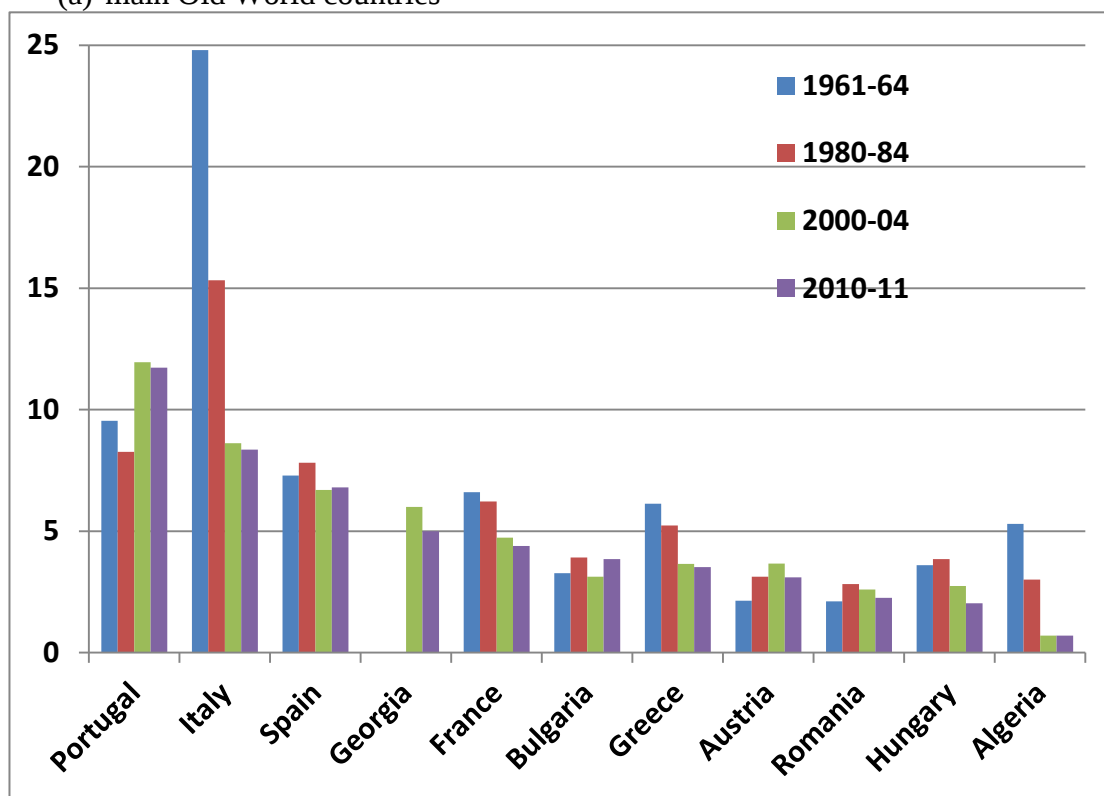
^a Algeria is not shown: its production was more than 150 litres/capita during the 1950s but was only 30 in the 1970s, eight in the 1980s, and has been less than two since then.

(b) Argentina, Australia, Chile, New Zealand, South Africa, and United States



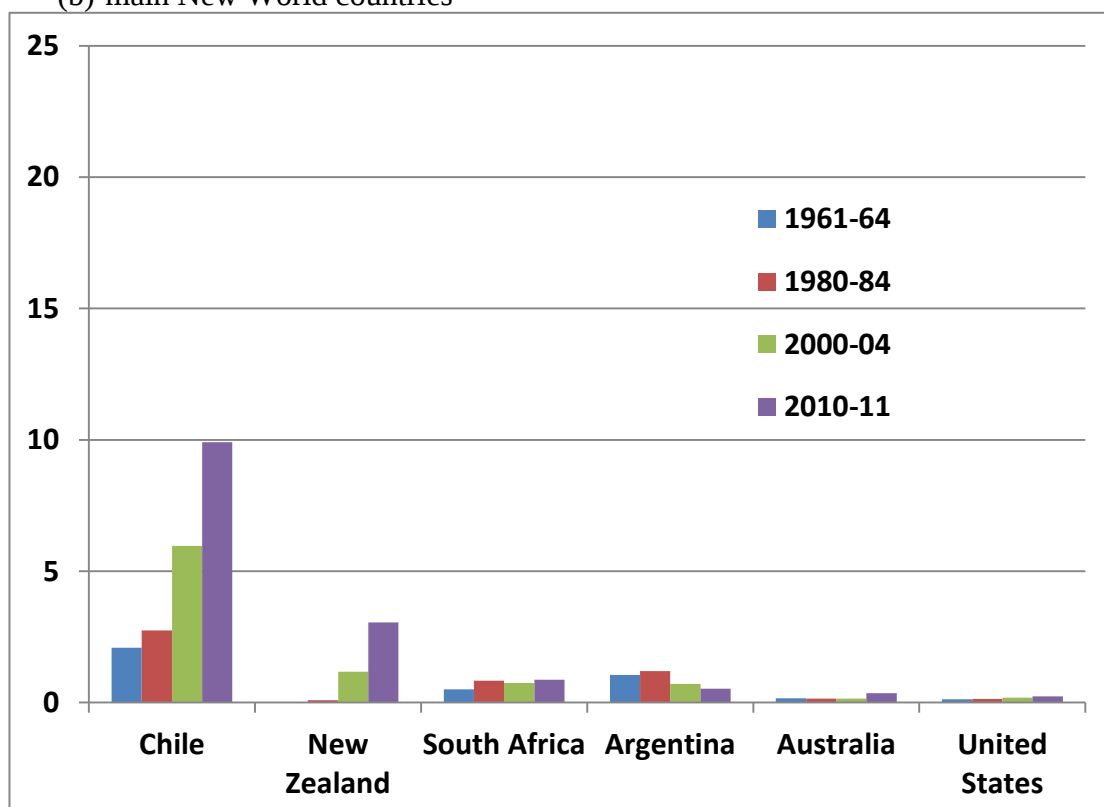
47. Vine area as a share of total crop area (%), main Old and New World countries, 1961 to 2011

(a) main Old World countries^a

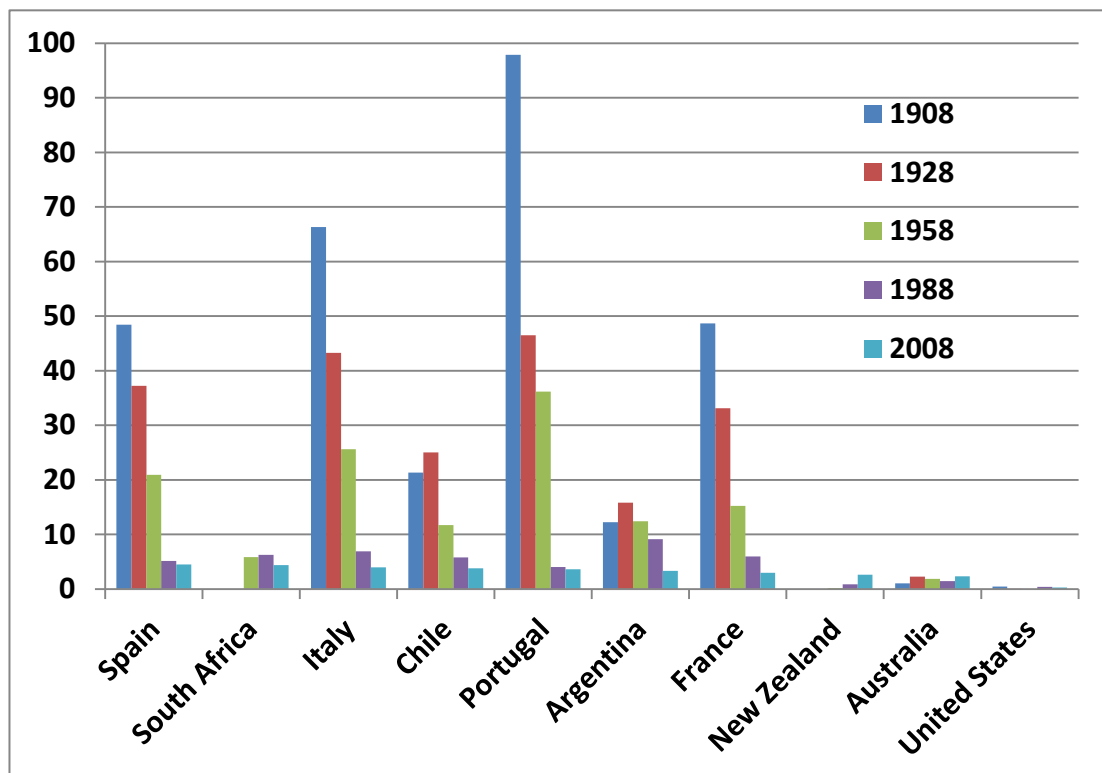


^a Shares for Moldova averaged 7% over the 2000-09 period, the same as Spain.

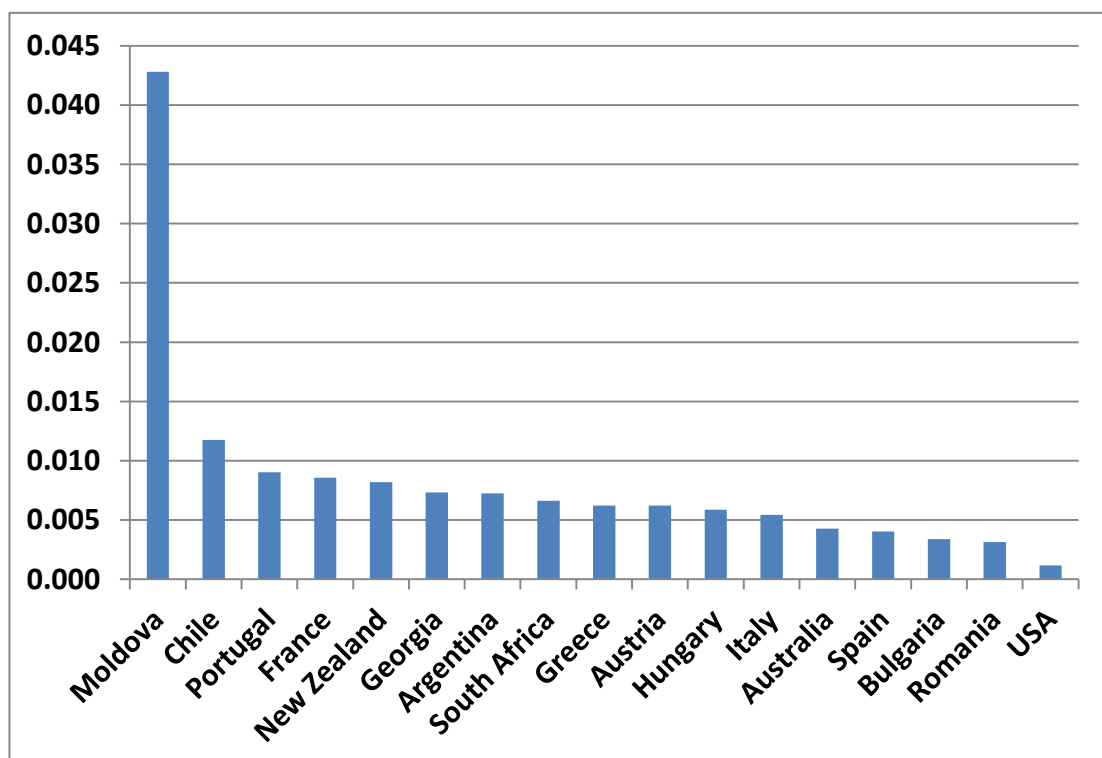
(b) main New World countries



48. Wine production volume per \$ of real GDP, main Old and New World countries, 1908 to 2008 (kl per million 1990 International Geary-Khamis dollars)

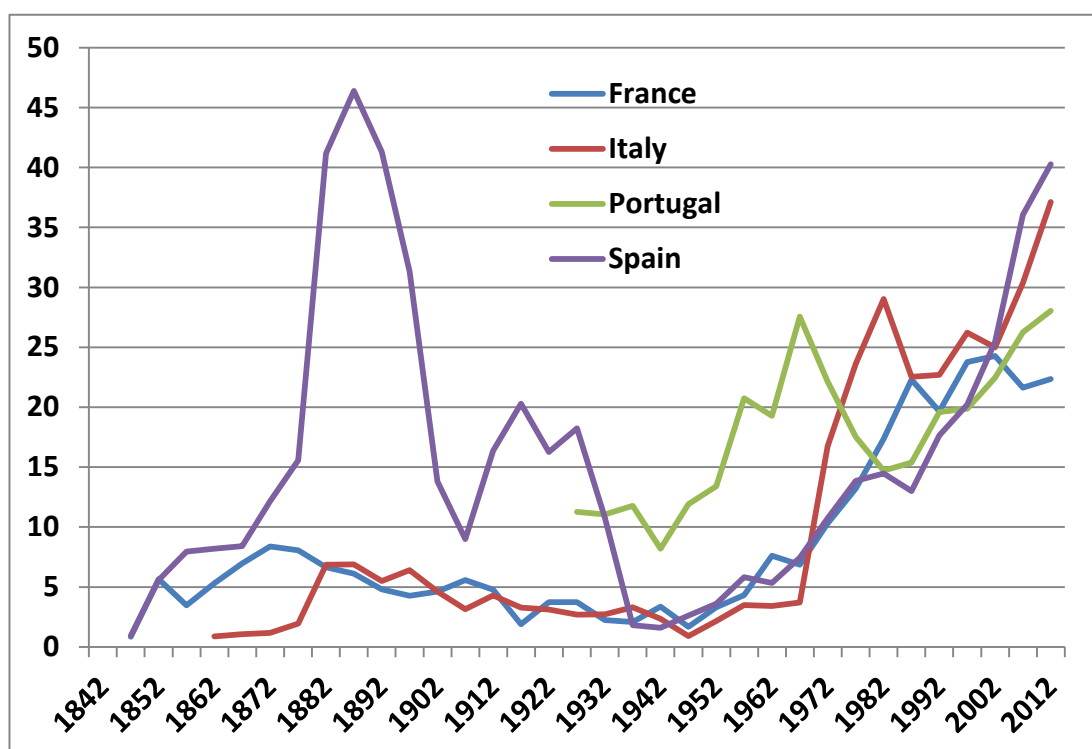


49. Wine production value as a share of GDP, main Old and New World countries, 2009 (%)



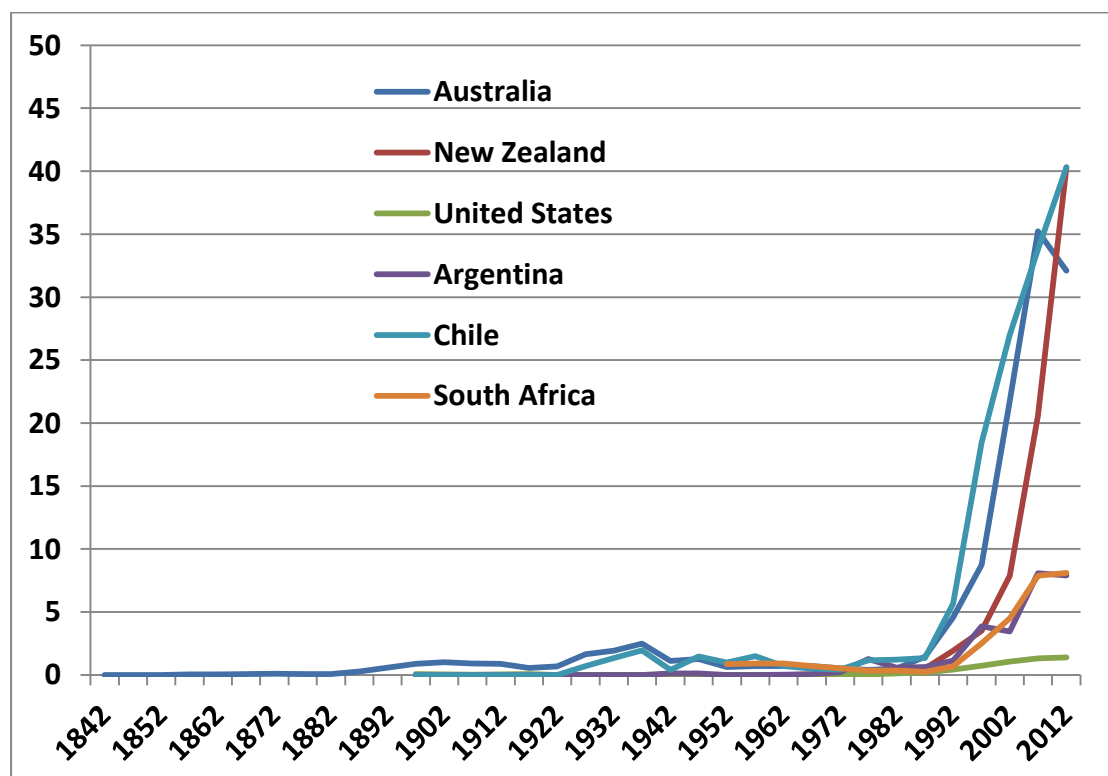
50. Wine exports per capita, main Old and New World countries, 1840 to 2013
(litres/year, 5-year averages around year shown except '2012' = 2010-13)

(a) France, Italy, Portugal and Spain^a

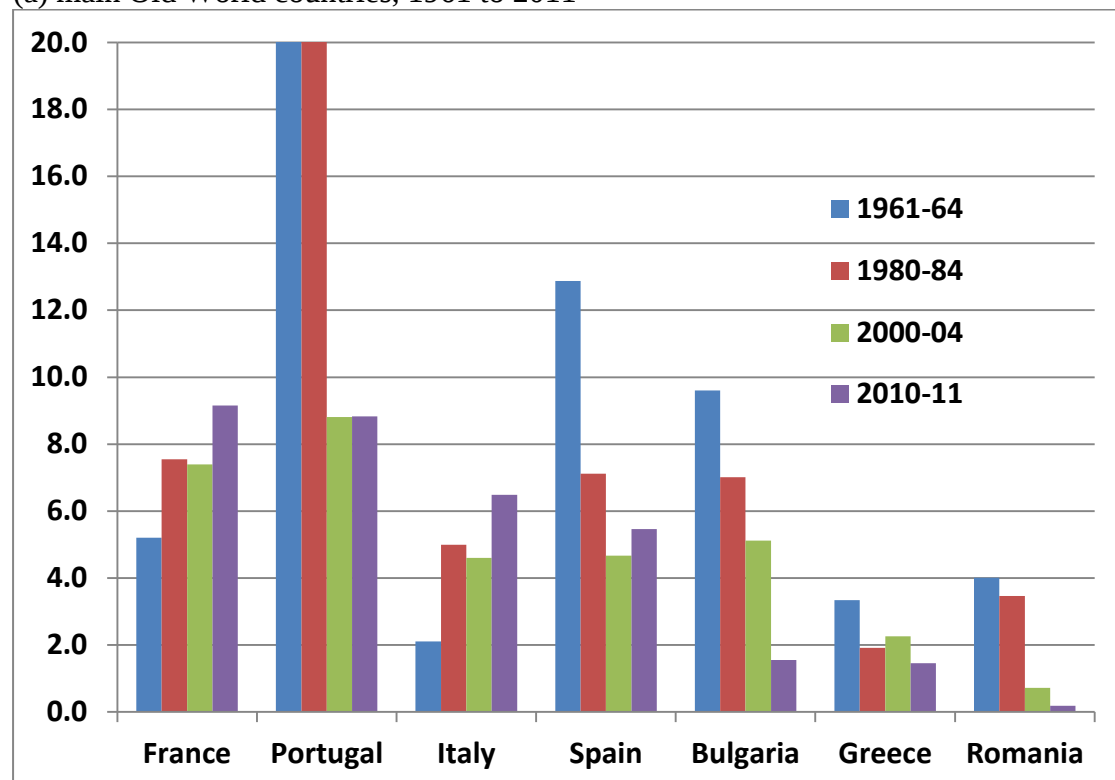


^a Algeria is not shown: it exported more than 100 litres per capita per year during 1900-60 but only six litres in the 1980s and less than 0.5 litre since then.

(b) Argentina, Australia, Chile, New Zealand, South Africa, and United States

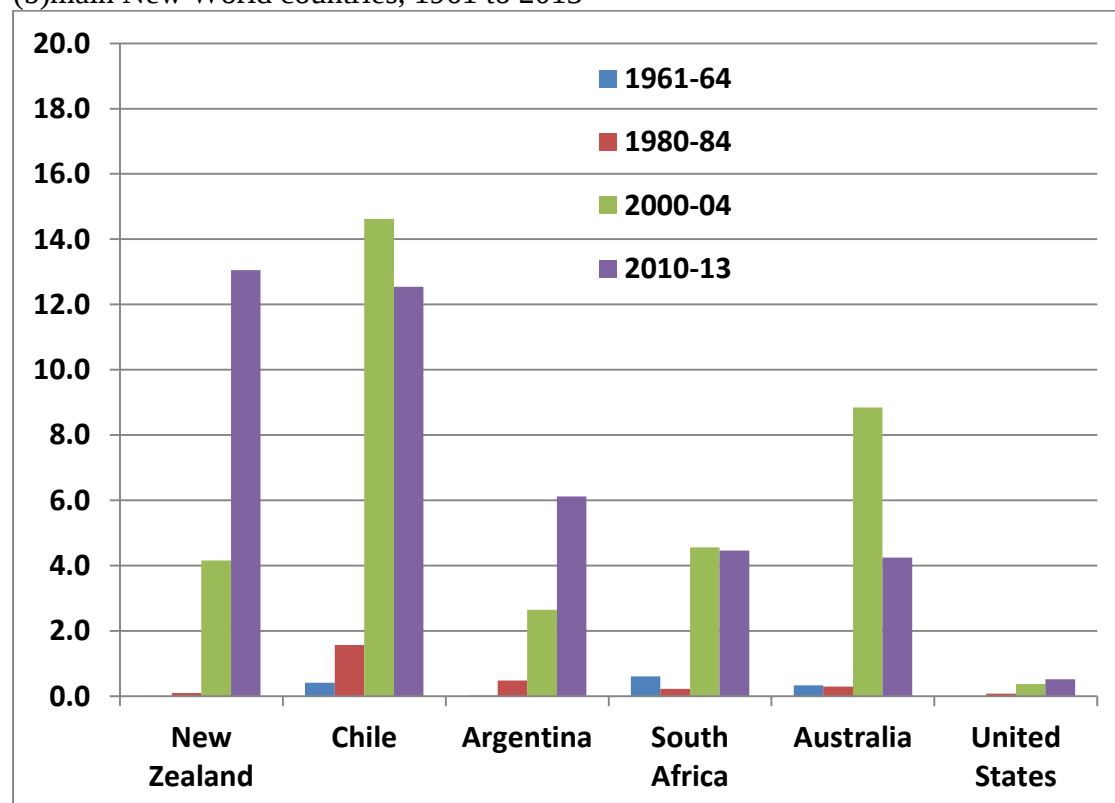


51. Wine comparative advantage index,^a 1961 to 2013
(a) main Old World countries, 1961 to 2011^b



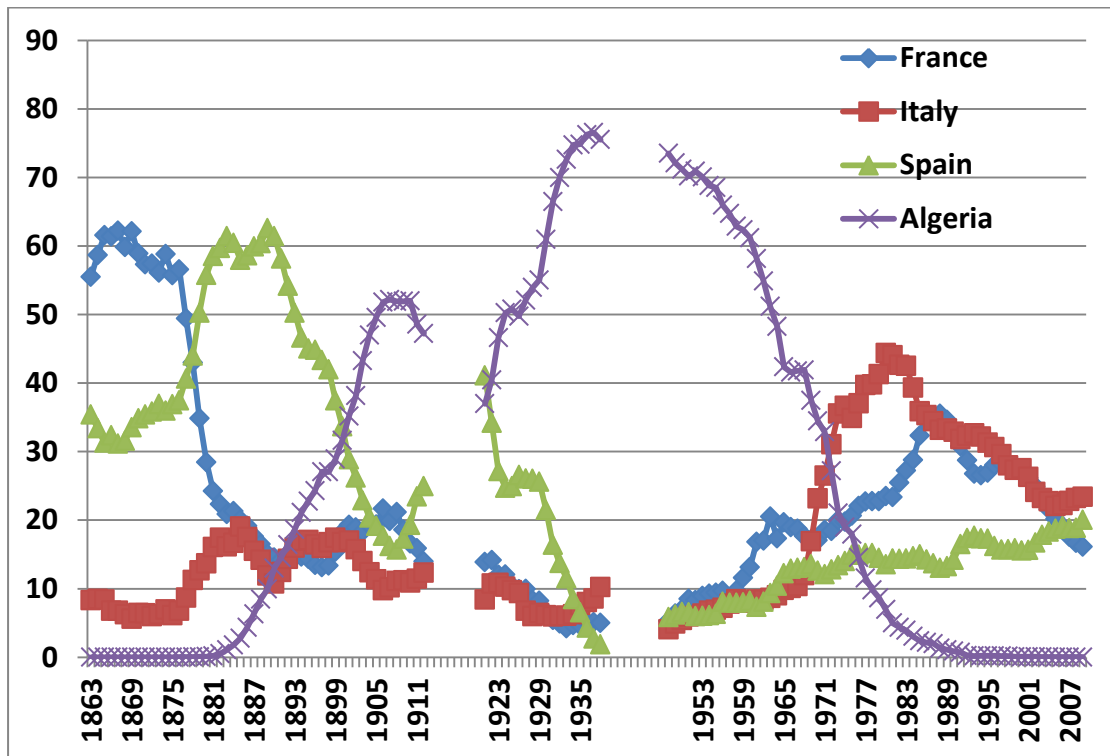
^b Algeria, Tunisia, Georgia and Moldova are not shown: the indexes for Algeria and Tunisia in 1961-64 were 118 and 49, but were <0.5 from 1980; the indexes for Georgia and Moldova were 43 and 100 in 2000-04 and 14 and 42 in 2010-11.

(b) main New World countries, 1961 to 2013

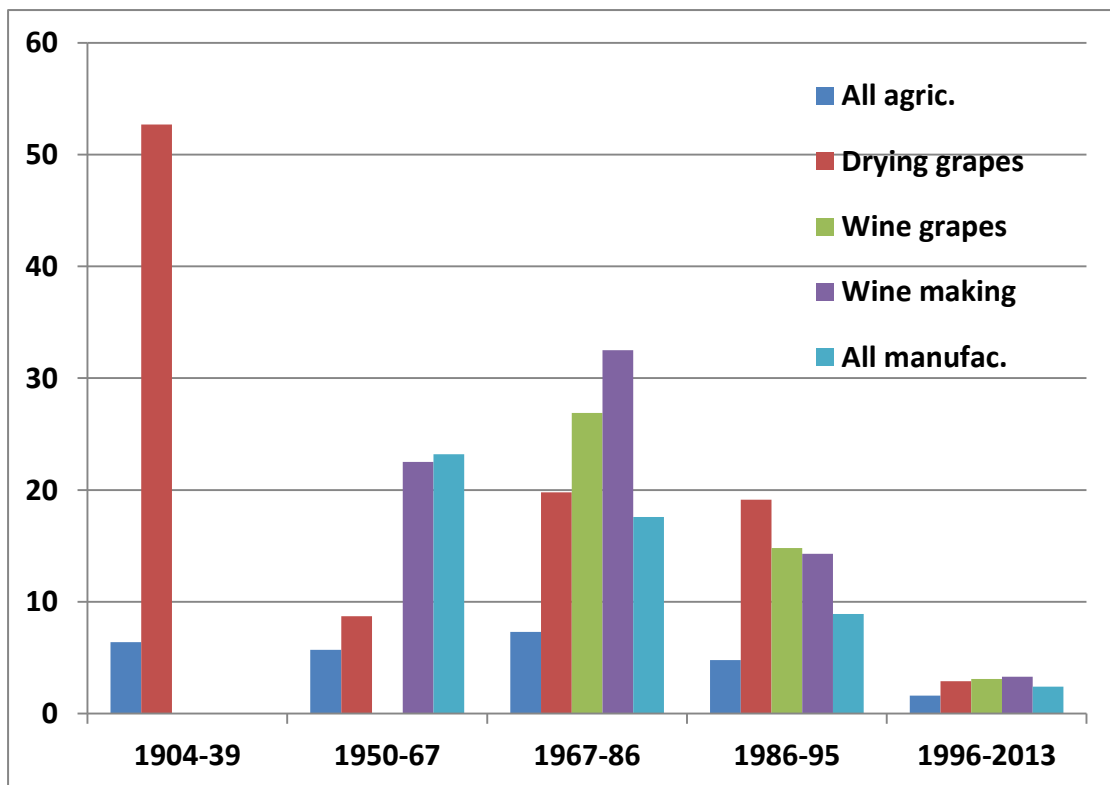


^a Index is the share of wine in national merchandise exports divided by wine's share of global exports.

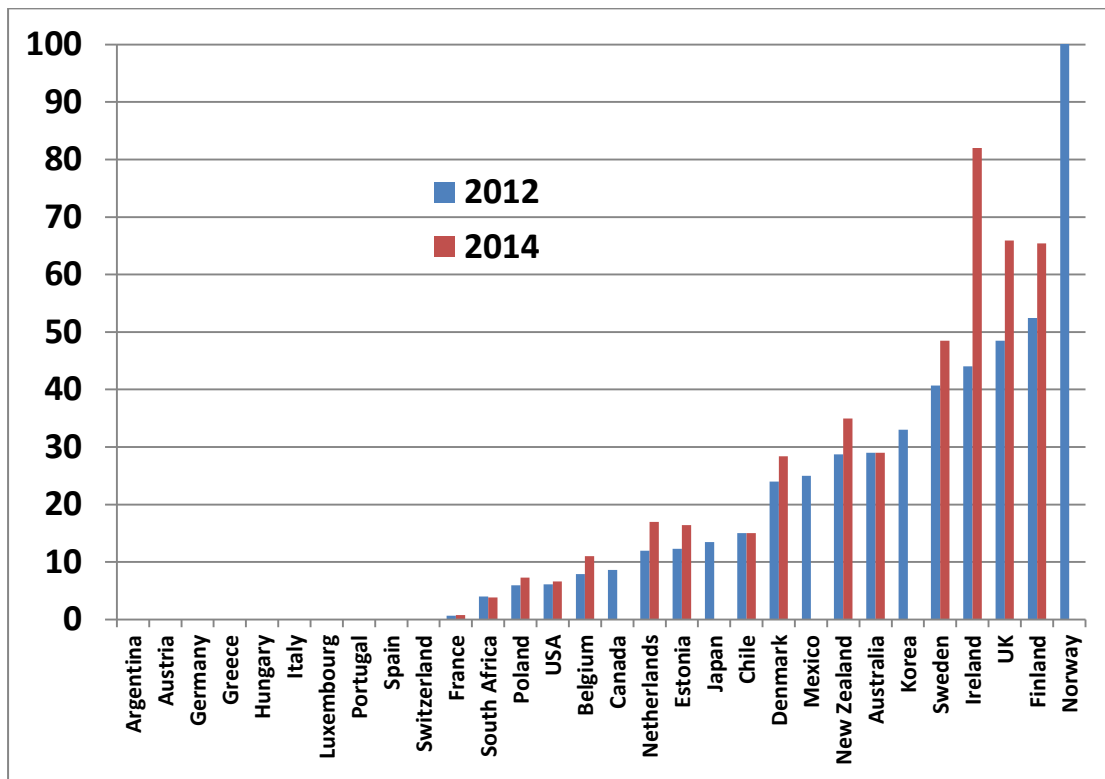
52. Share of volume of global wine exports, key Mediterranean countries, 1861 to 2011 (% , 5-year moving average)



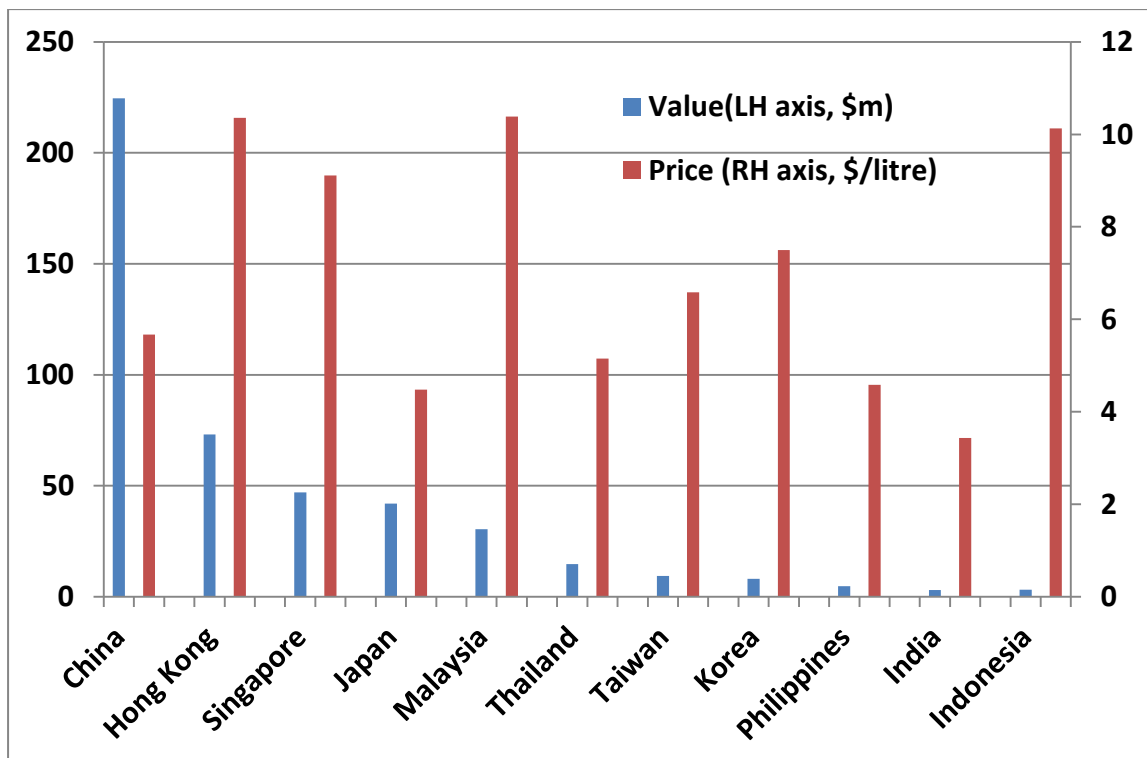
53. Nominal rates of assistance to grape growing, wine making, all agriculture, and all manufacturing, 1904 to 2013



54. Ad valorem consumer tax equivalent of excise in commercial premium wines, various countries, 2012 and 2014

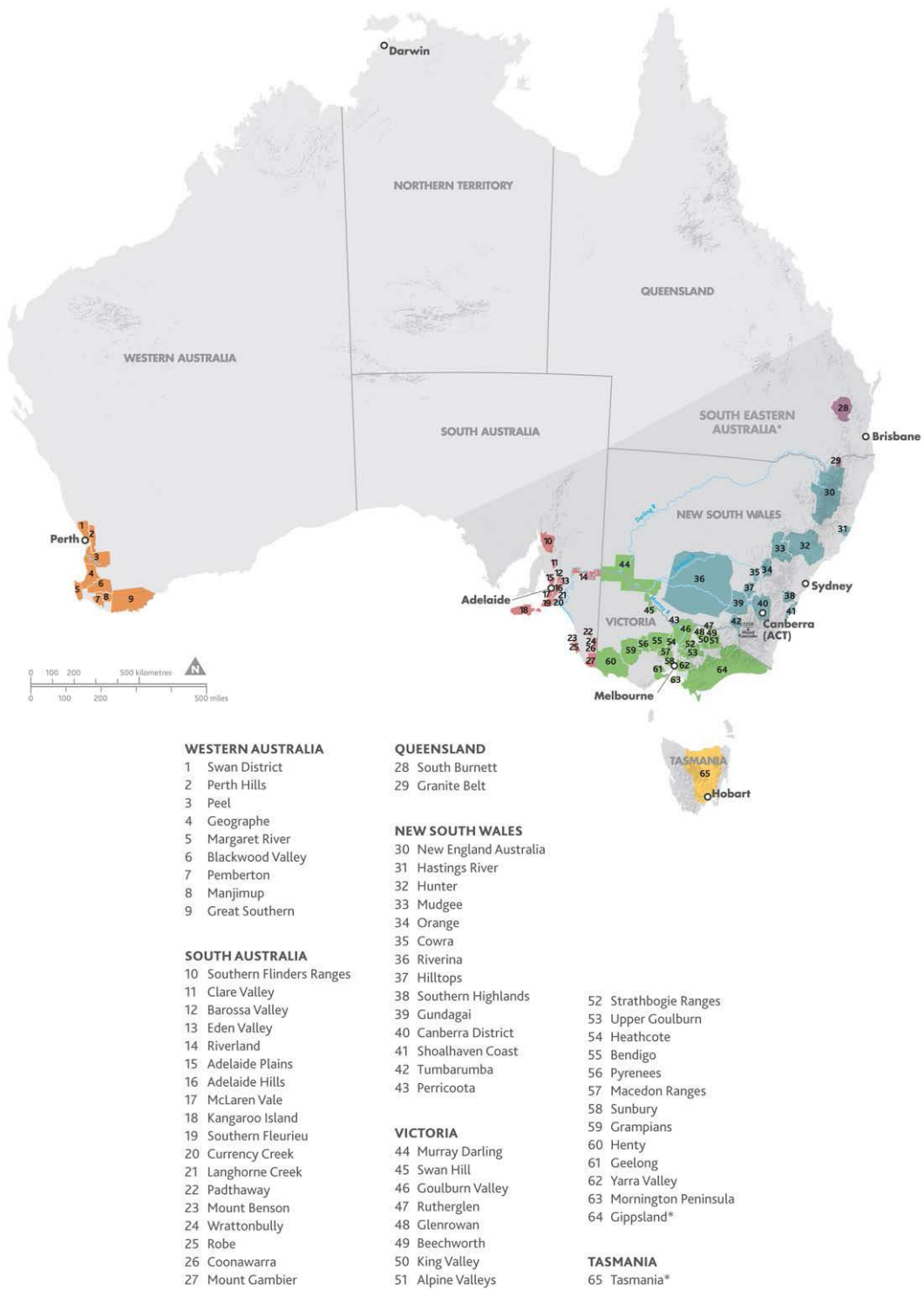


55. Total and unit value of Australia's wine export to Asia, 2011-14 (A\$/m/year and A\$/litre, July 2011 to June 2014)



Section II. Regional grape and wine developments from the late 20th century

56. Map of Australia's 65 wine regions

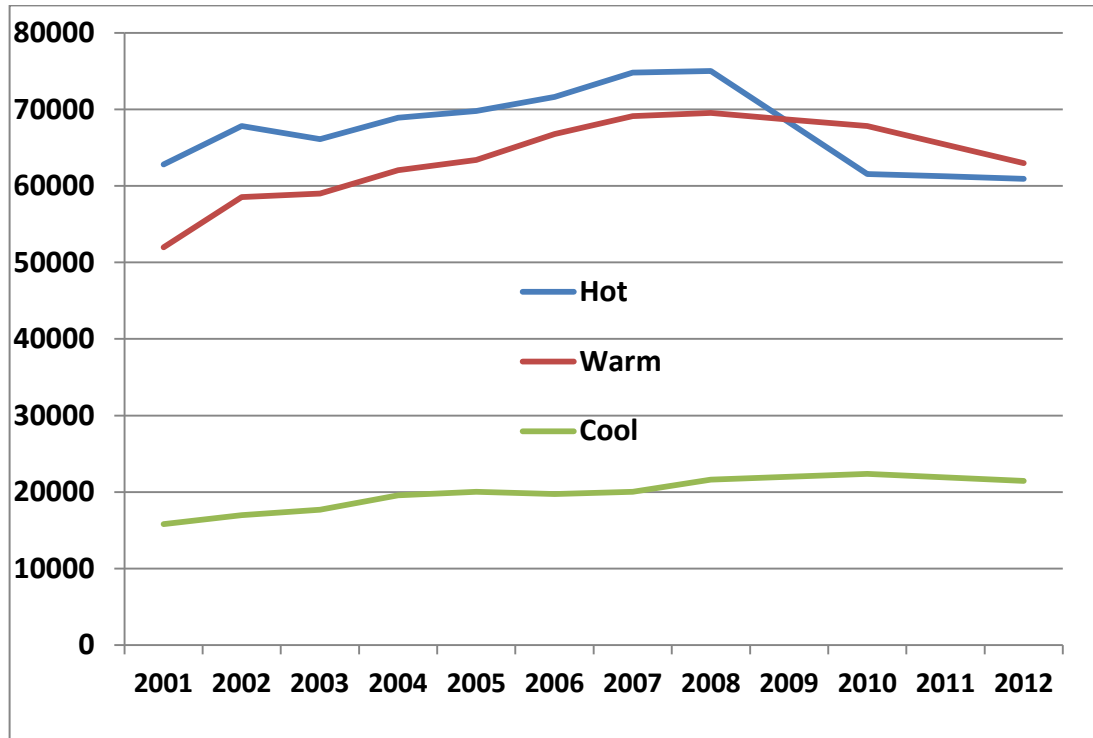


*South Eastern Australia and Gippsland are zones, Tasmania is a state.

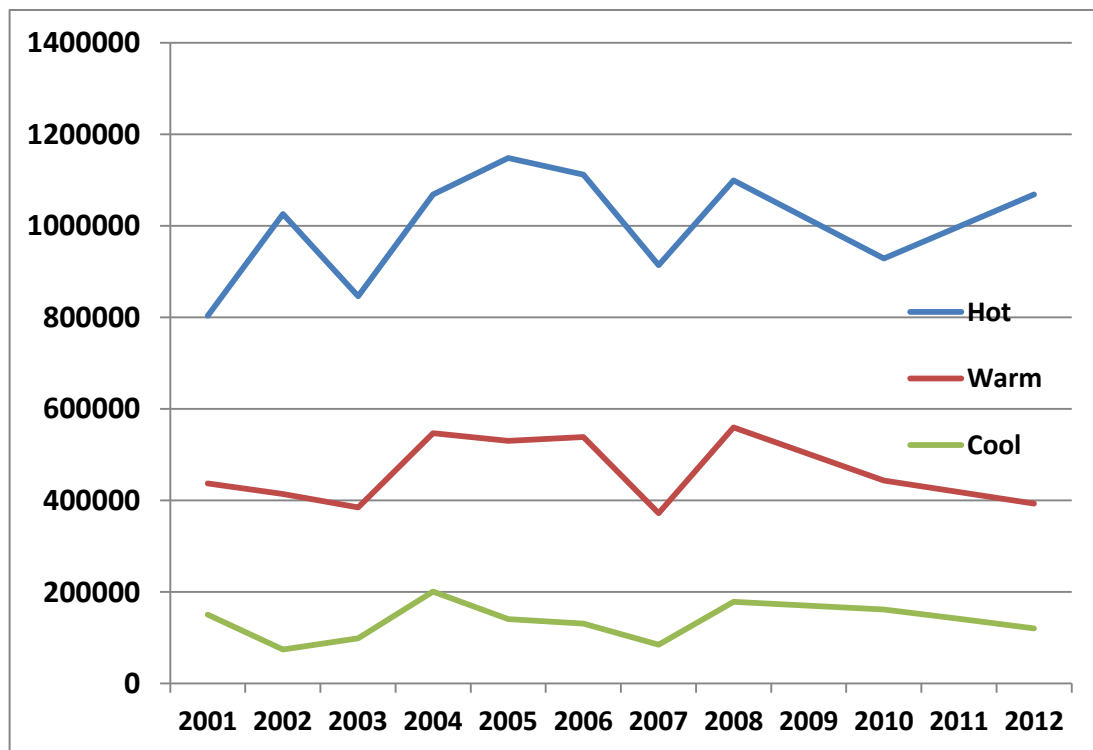
Source: Australian Grape and Wine Authority

57. Winegrape bearing area and winegrape production, by climate zone, 2001 to 2012

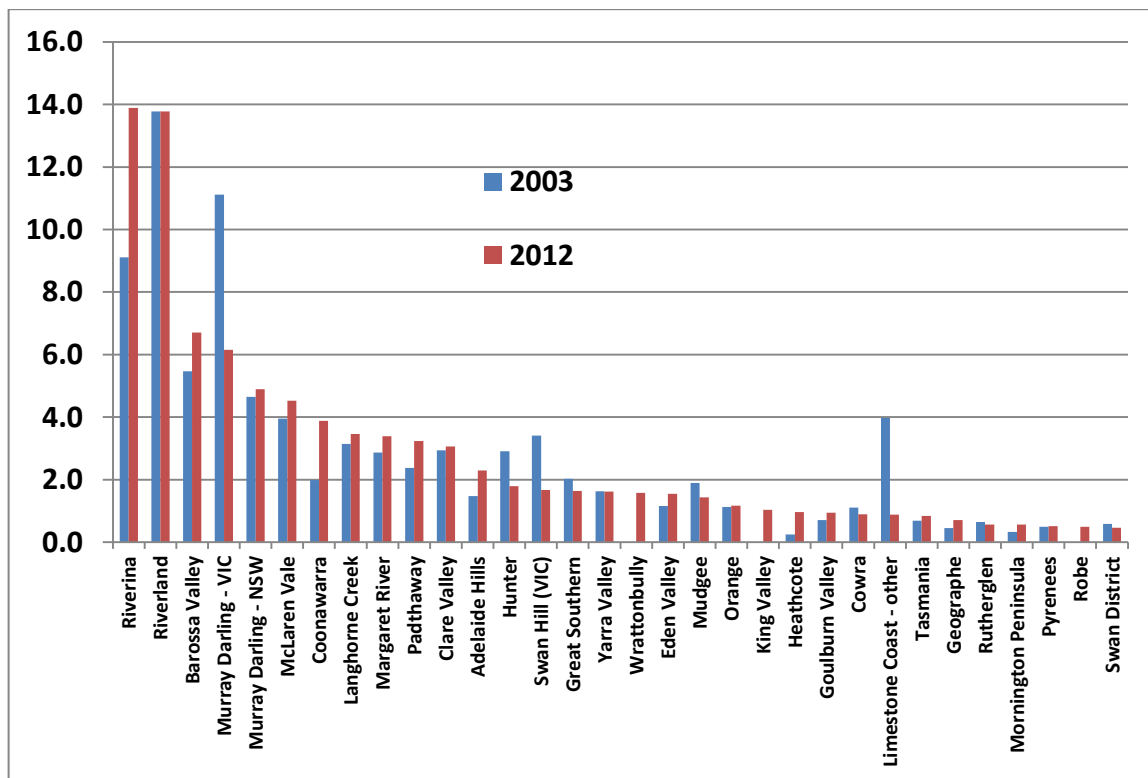
(a) Bearing area (ha)



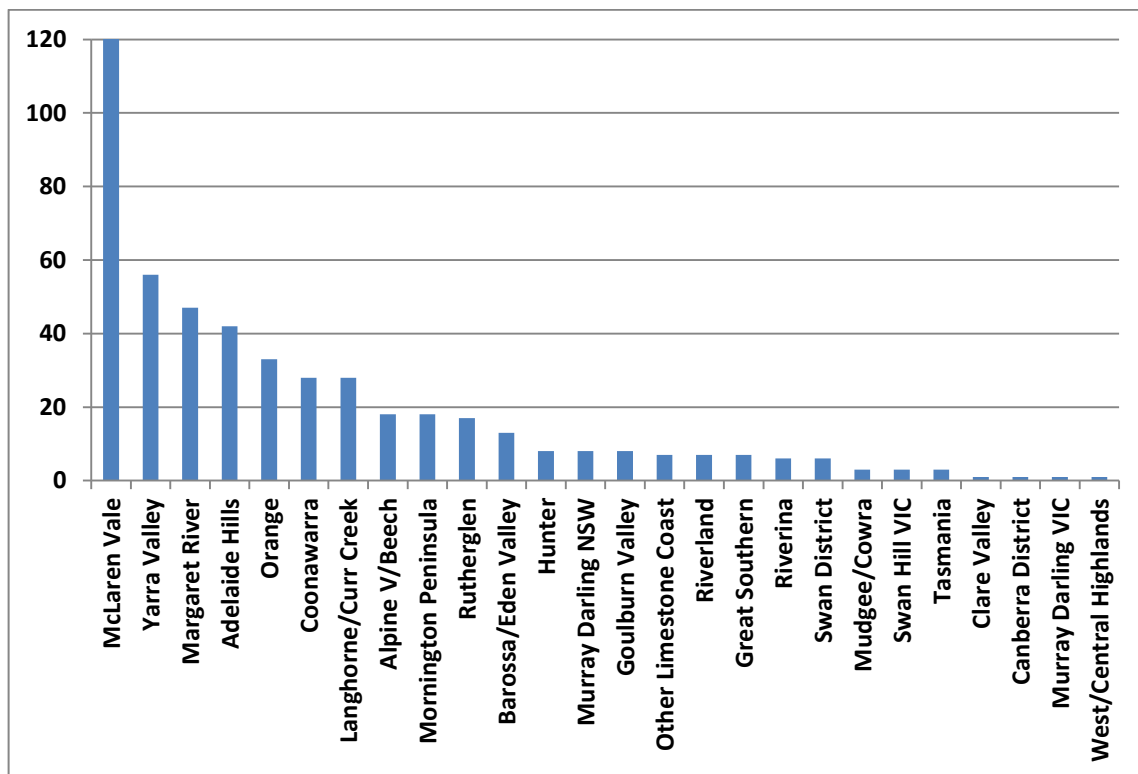
(b) Winegrape production (tonnes)



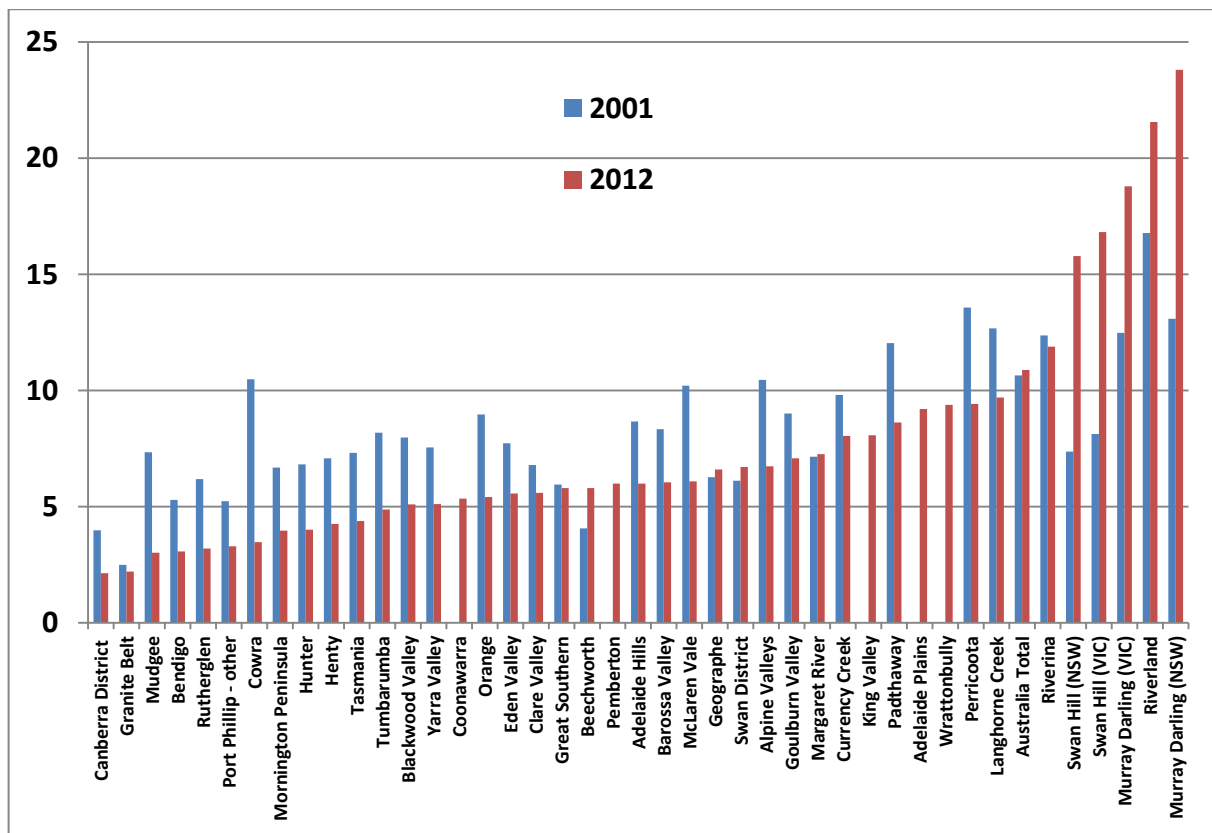
58. Regional shares of national winegrape bearing area, 2003 and 2012 (%)



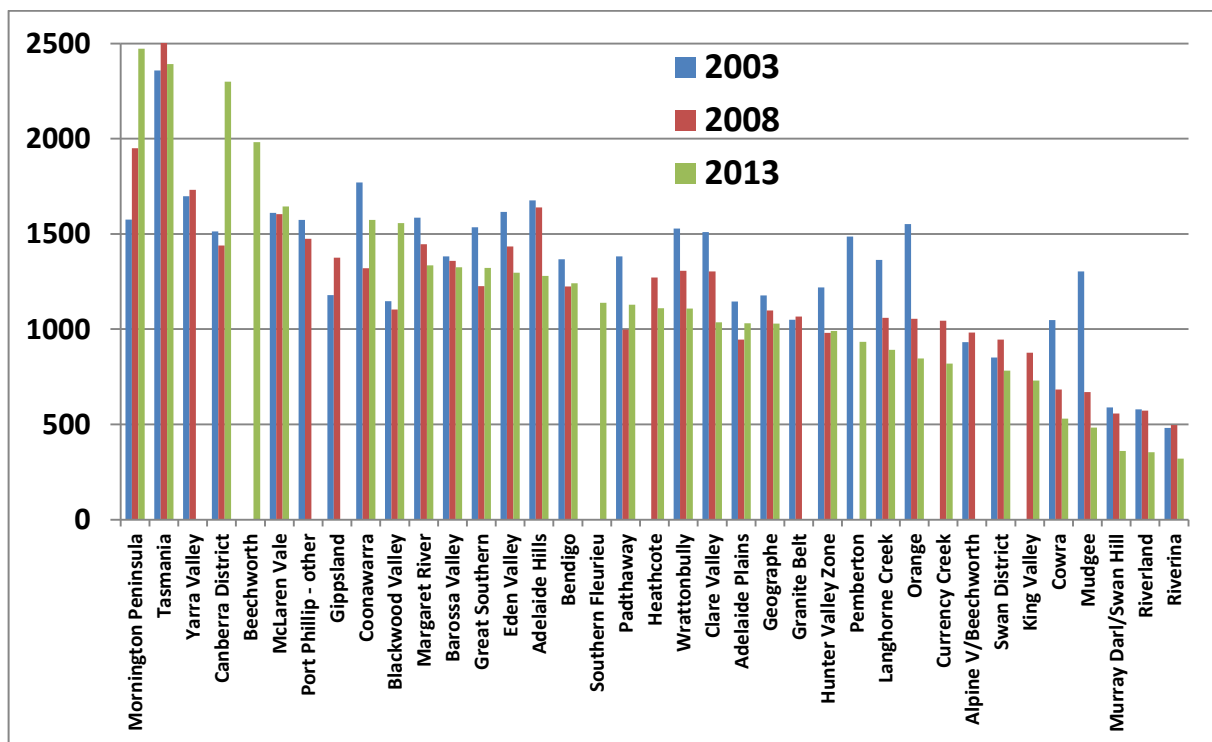
59. Regional diversity in terms of vine intensity of cropping, 2006



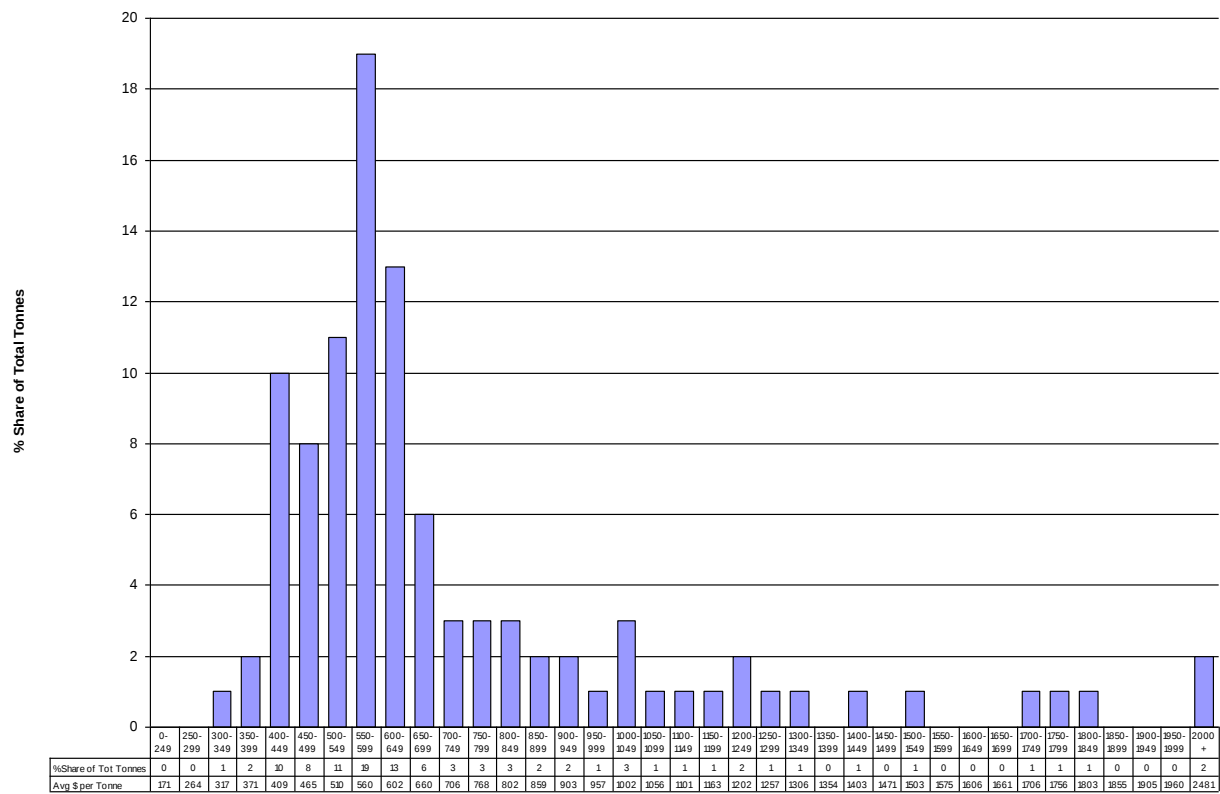
60. Regional diversity in terms of winegrape yield per hectare, 2001 and 2012 (t/ha)



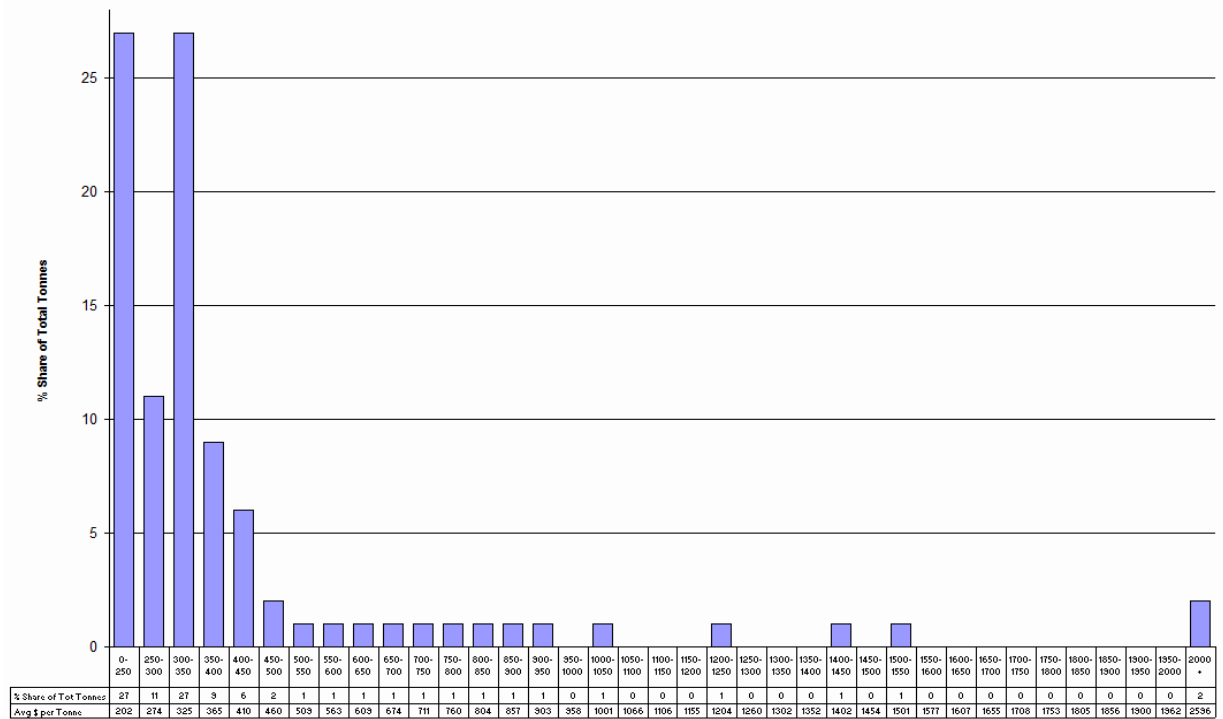
61. Average price of winegrapes, by region, 2003, 2008 and 2013 (AUD/tonne)



62. Distribution of winegrape prices across price points nationally, 2008 and 2014
 (% of total tonnes crushed, from AGWA (2014) and the earlier 2008 report)
 (a) 2008, all varieties

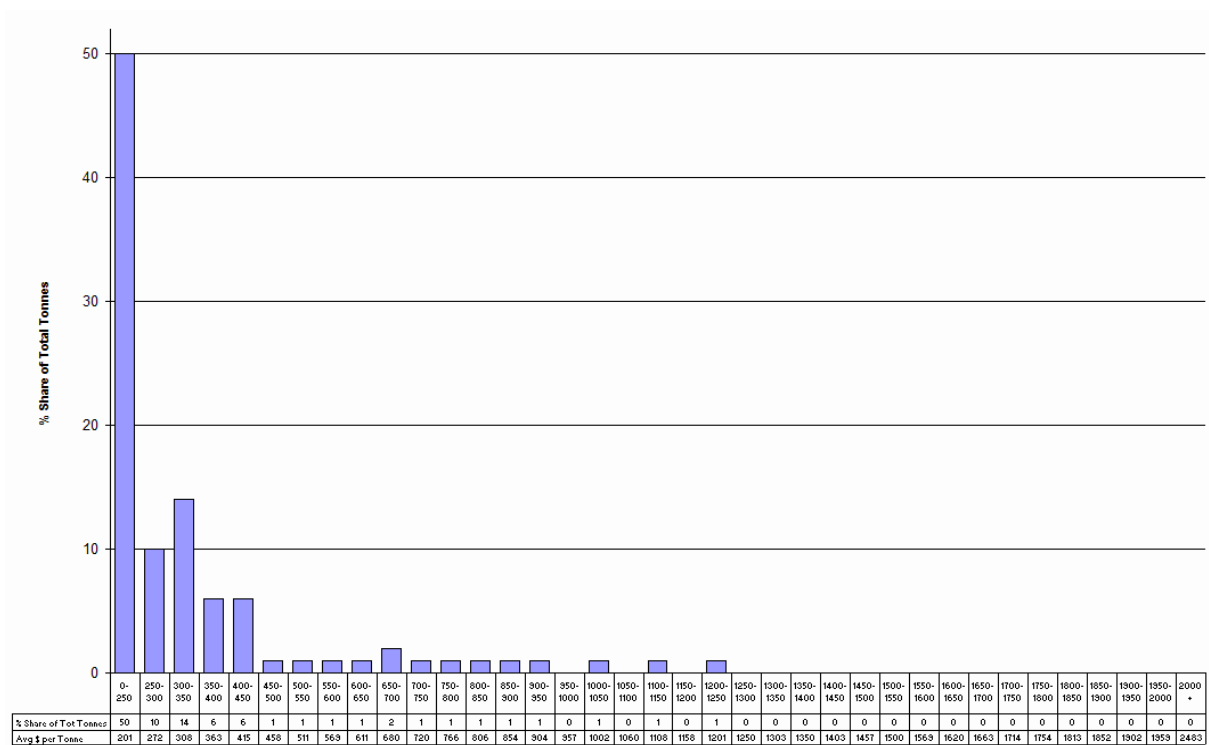


(b) 2014, all varieties

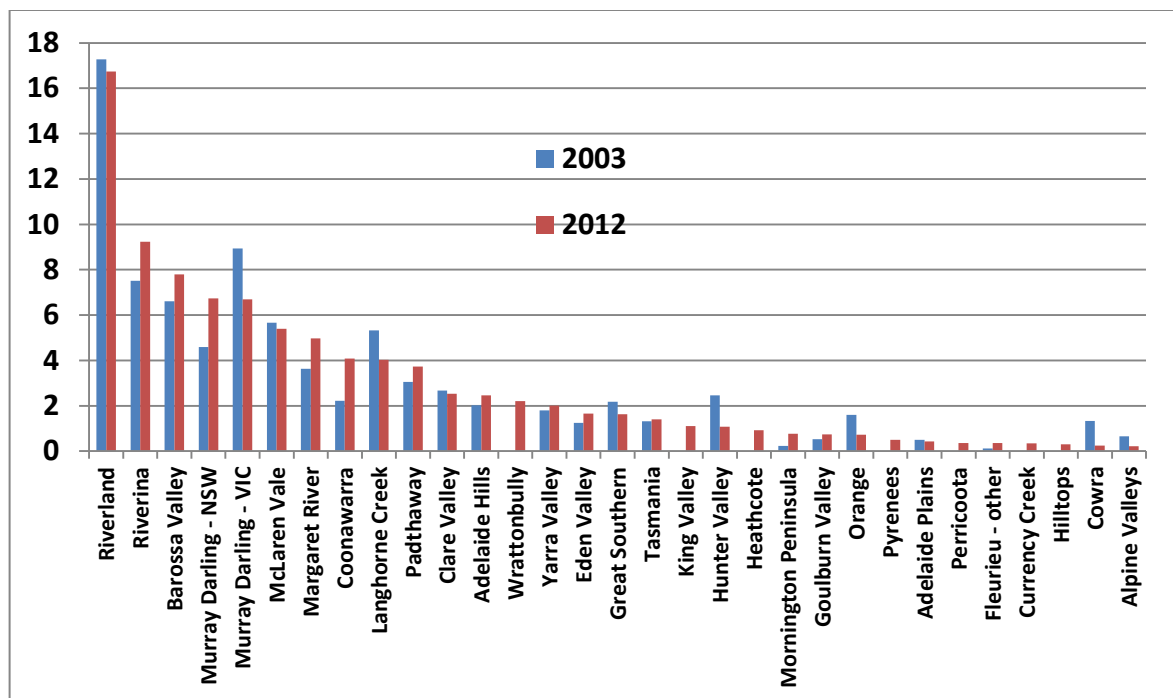


62 (cont). Distribution of winegrape prices across price points nationally, 2008 and 2014
 (% of total tonnes crushed, from AGWA (2014))

(c) 2014, white varieties

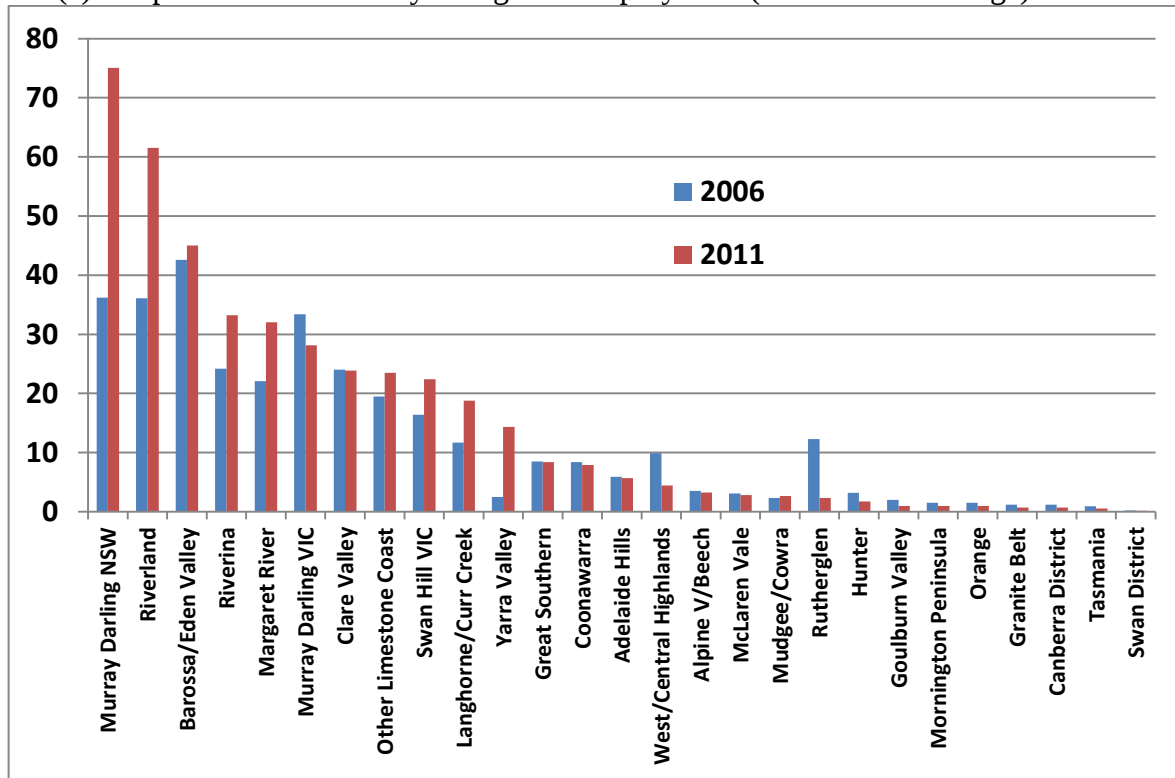


63. Regional shares of national winegrape production value, 2003 and 2012 (%)

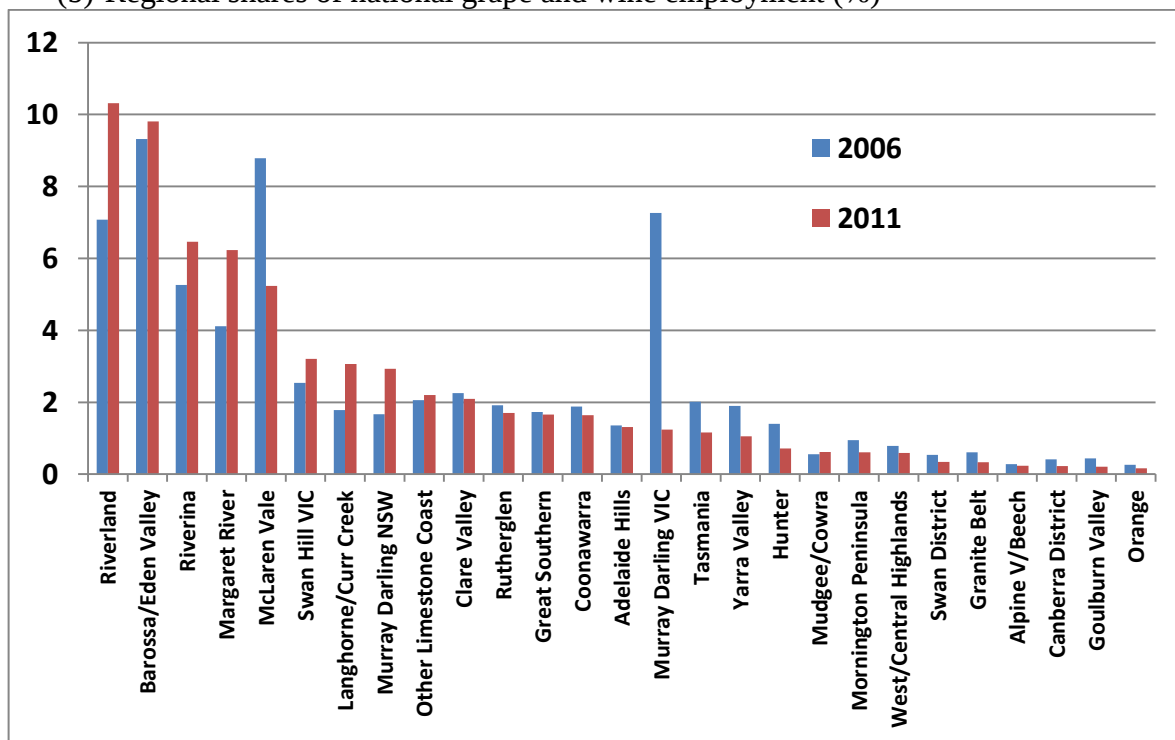


64. Regional diversity in terms of grape and wine industry employment, 2006 and 2011

(a) Grape and wine intensity of regional employment (1 = national average)

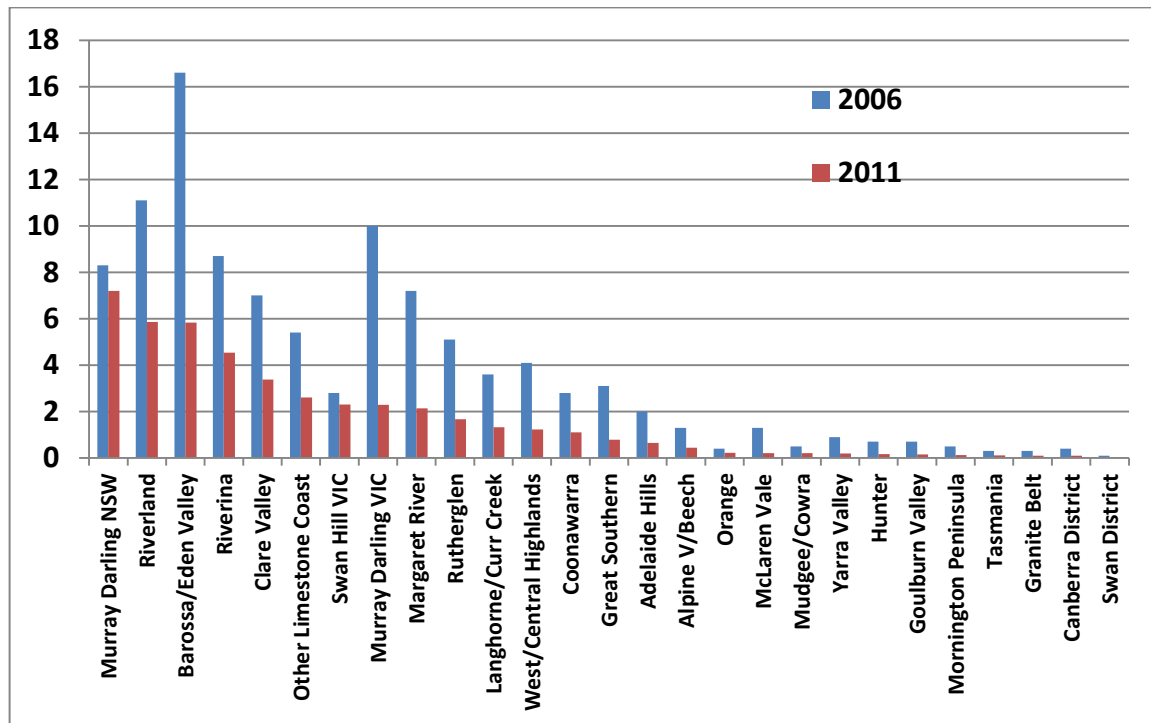


(b) Regional shares of national grape and wine employment (%)

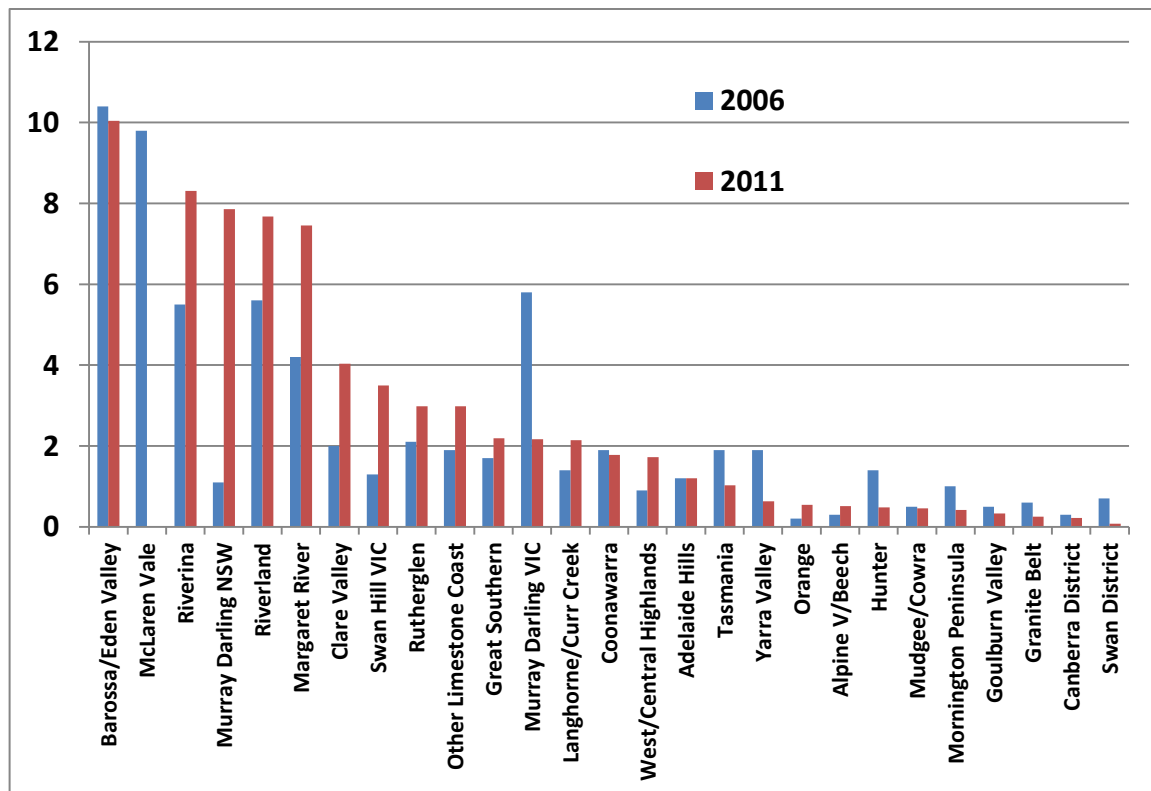


65. Regional diversity in terms of grape and wine value added, 2006 and 2011

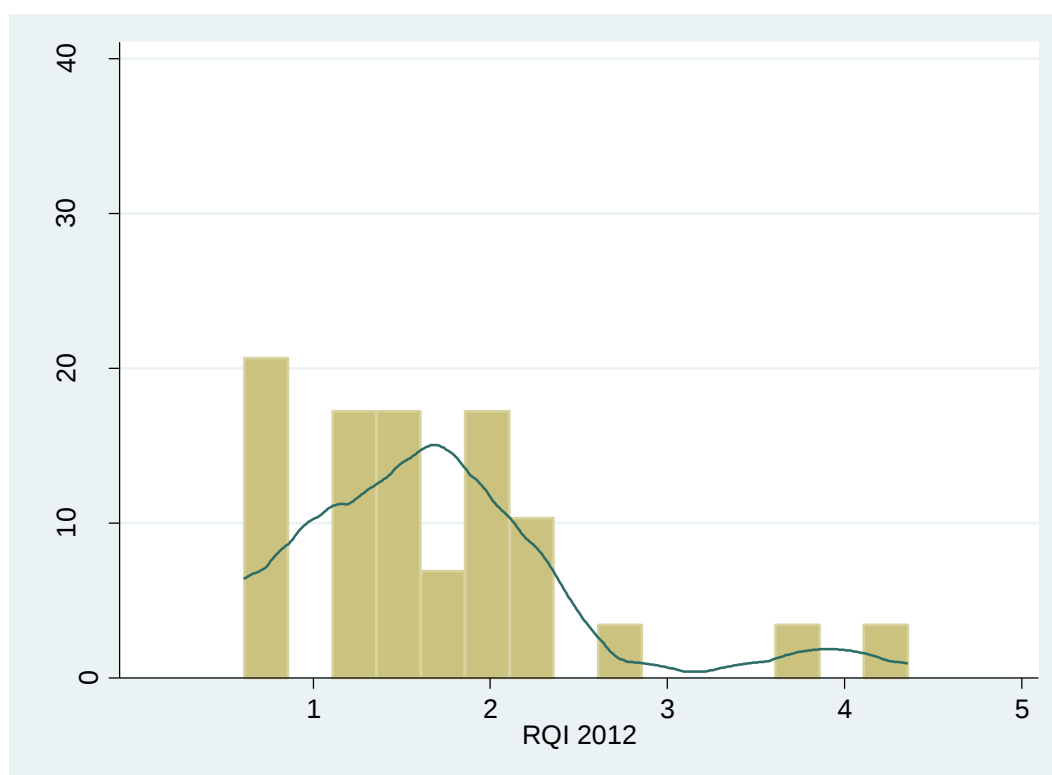
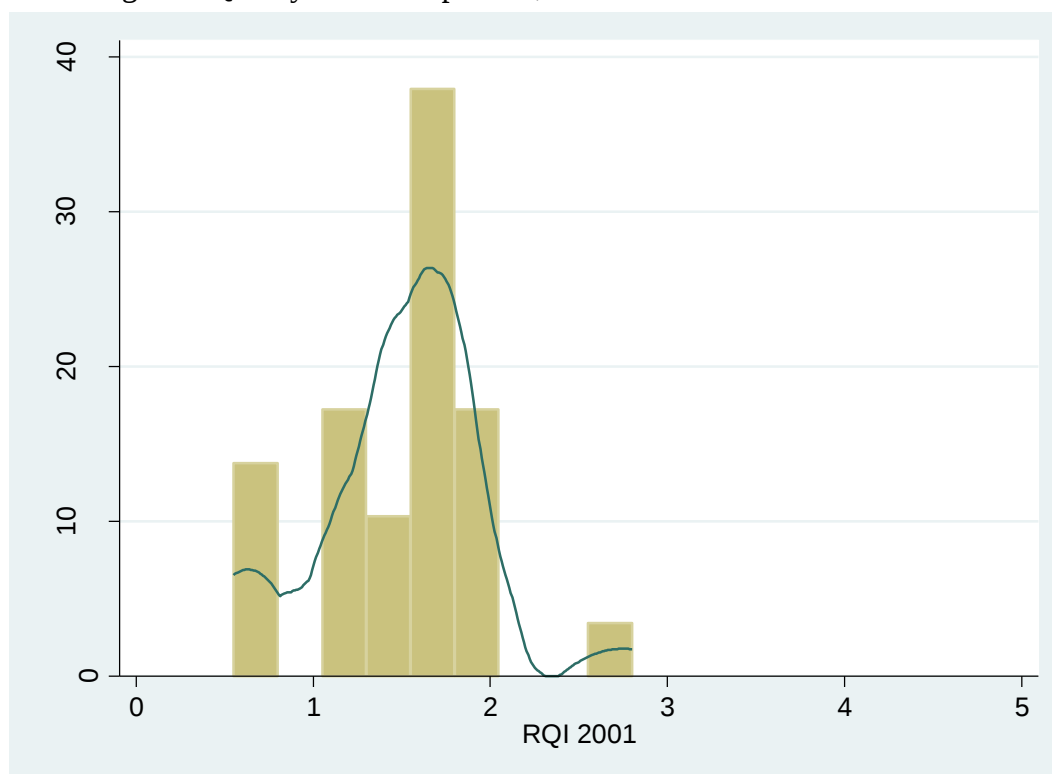
(a) Grape and wine share of value added of regional economy (%)



(b) Region's share of national grape and wine value added (%)



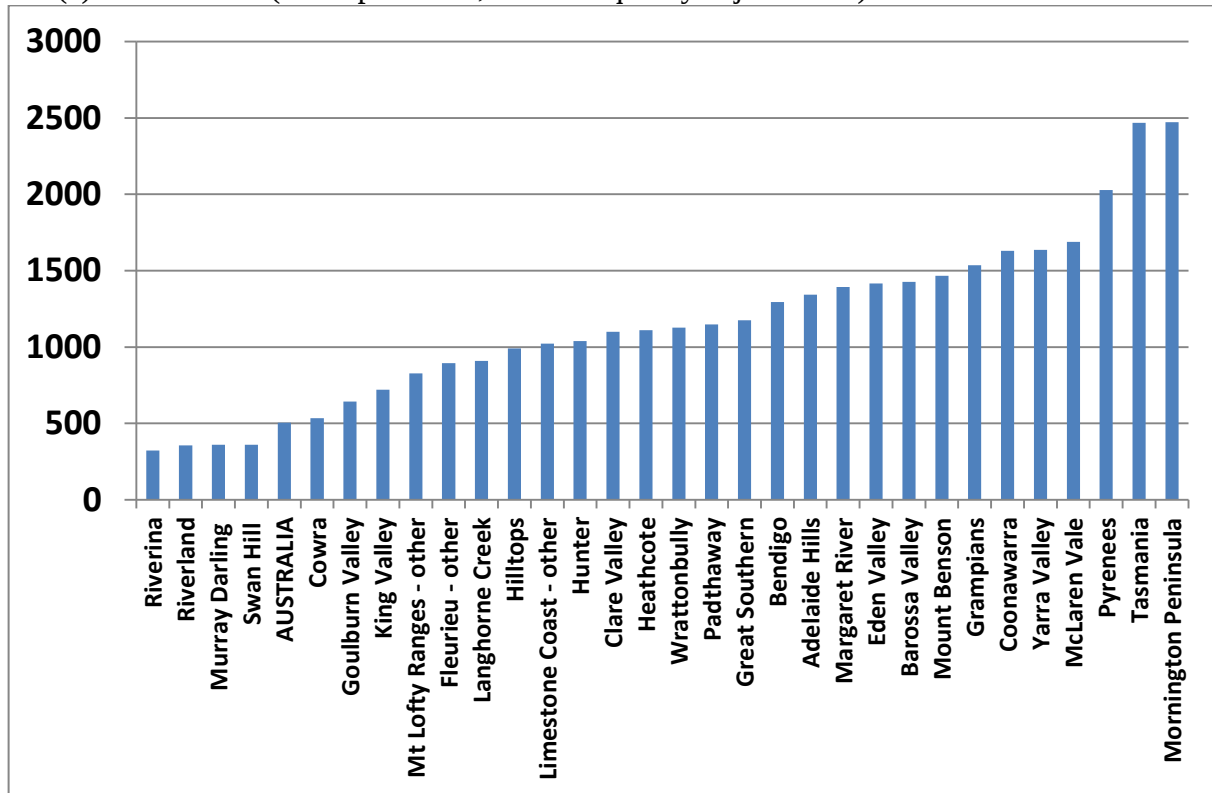
66. Regional Quality Index^a dispersion, 2001 and 2012



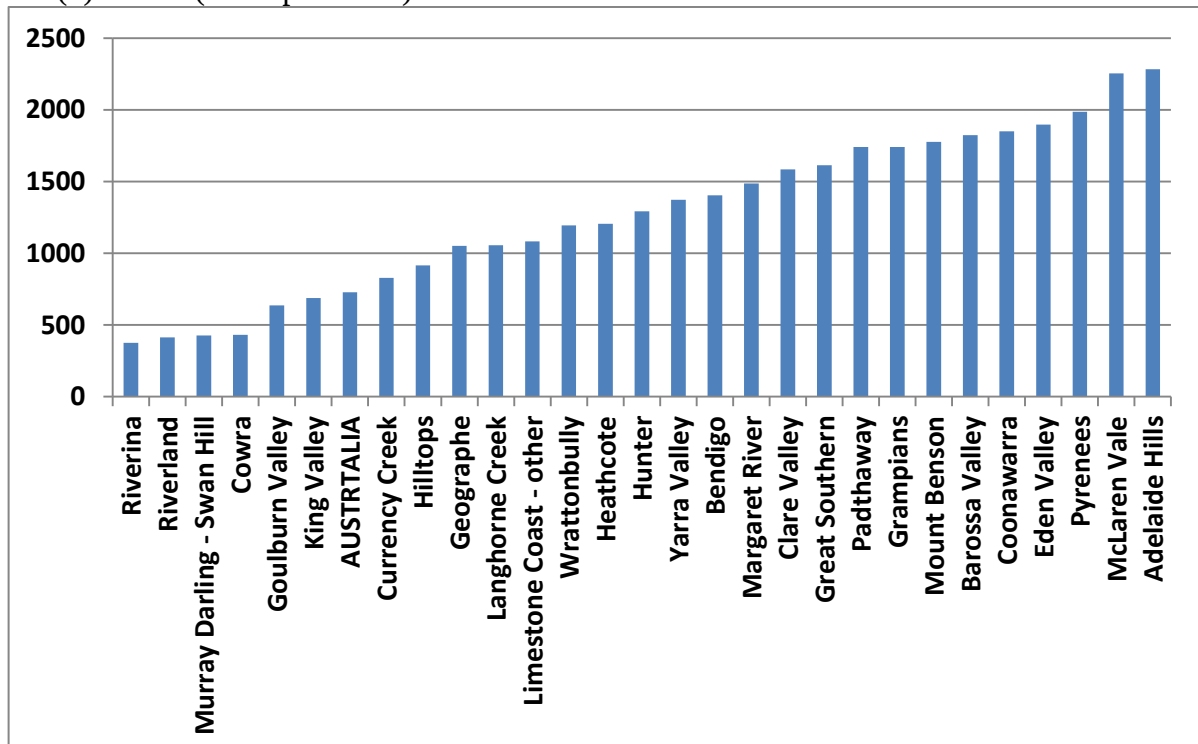
^a Regional Quality Index is defined as the ratio of the regional average price for all varieties to the national average price for all winegrapes.

67. Average price of winegrapes, by region, Australia, 2013

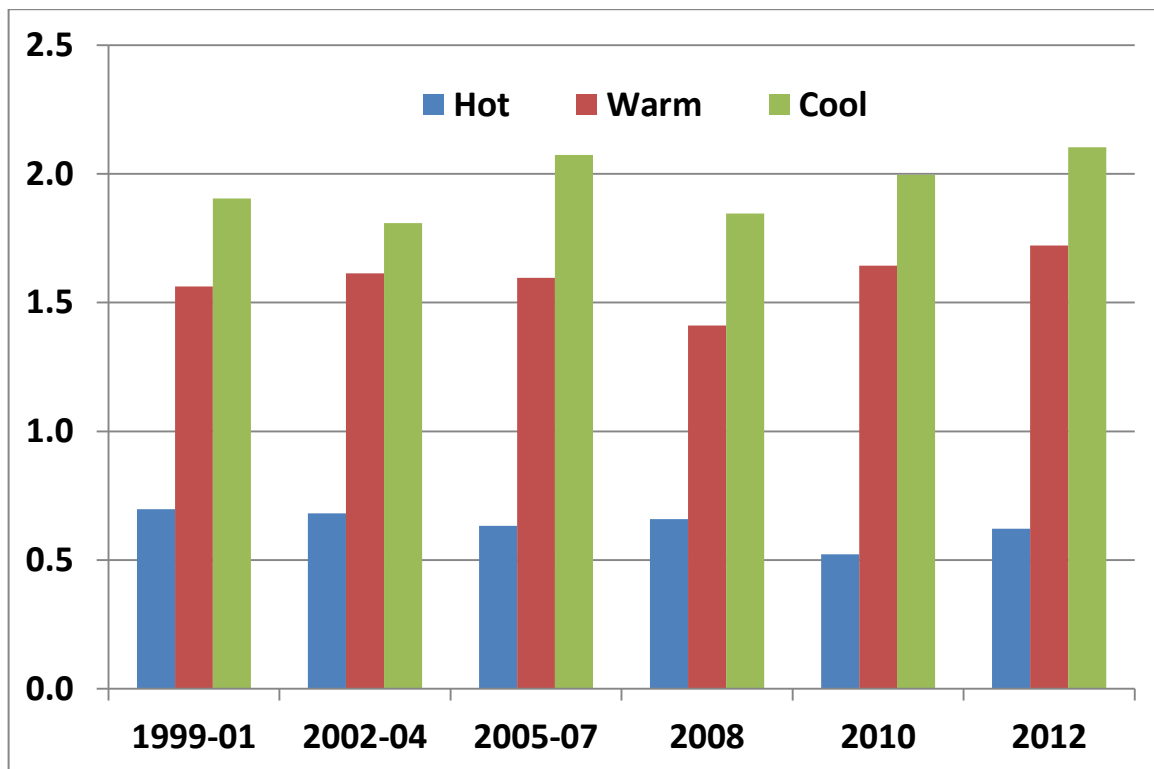
(a) All varieties (AUD per tonne, V2 after quality adjustments)



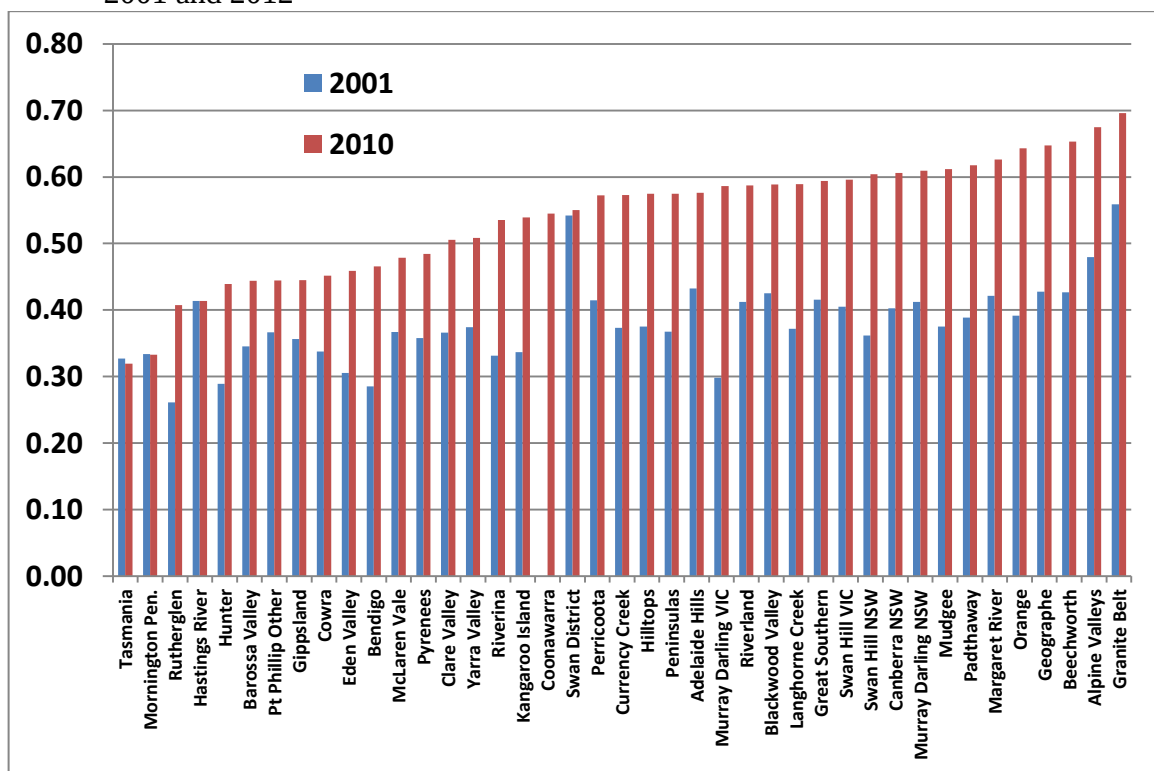
(b) Shiraz (AUD per tonne)



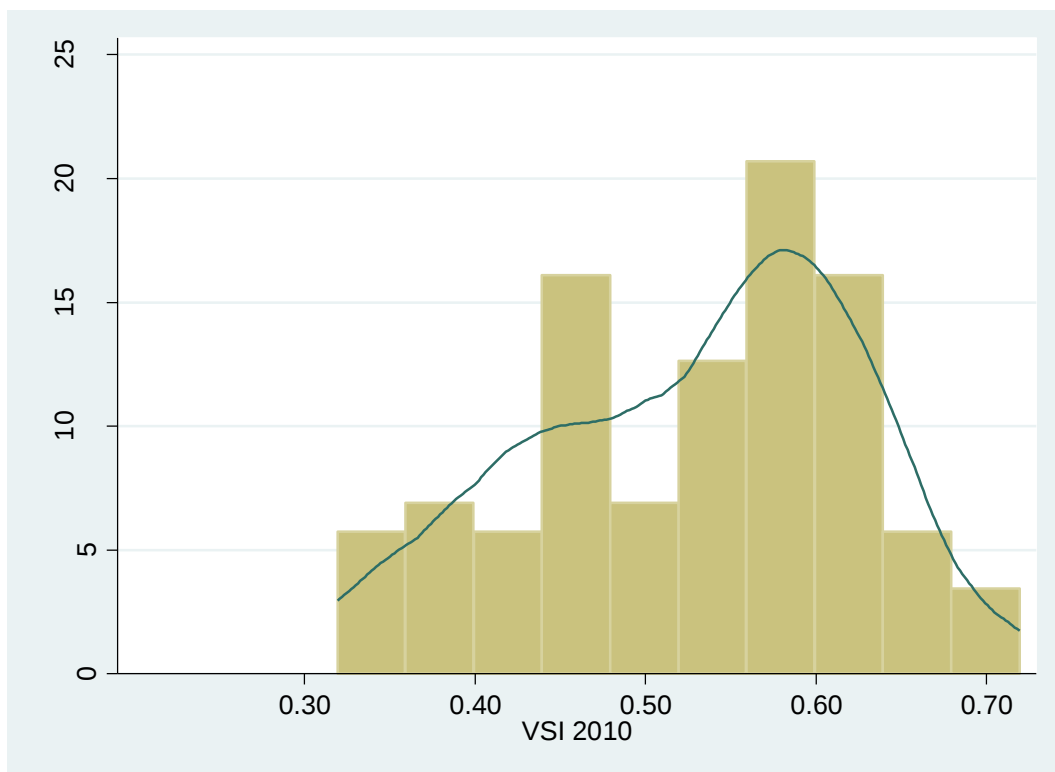
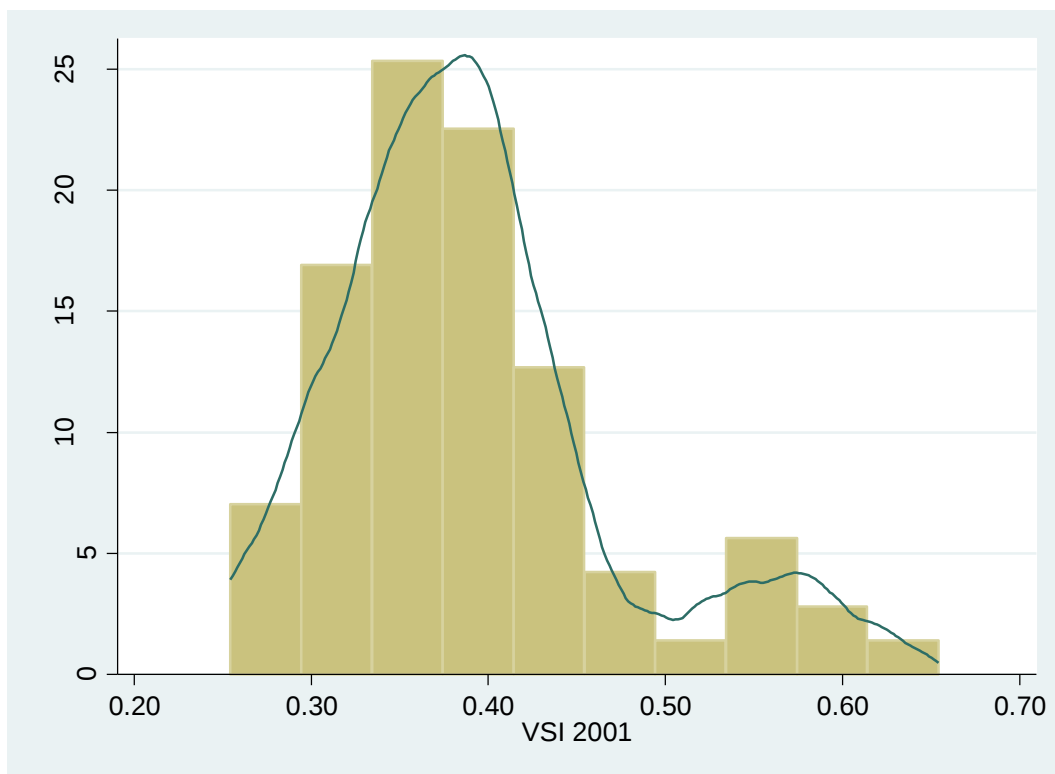
68. Regional Quality Index diversity across climate zones, 1999 to 2012



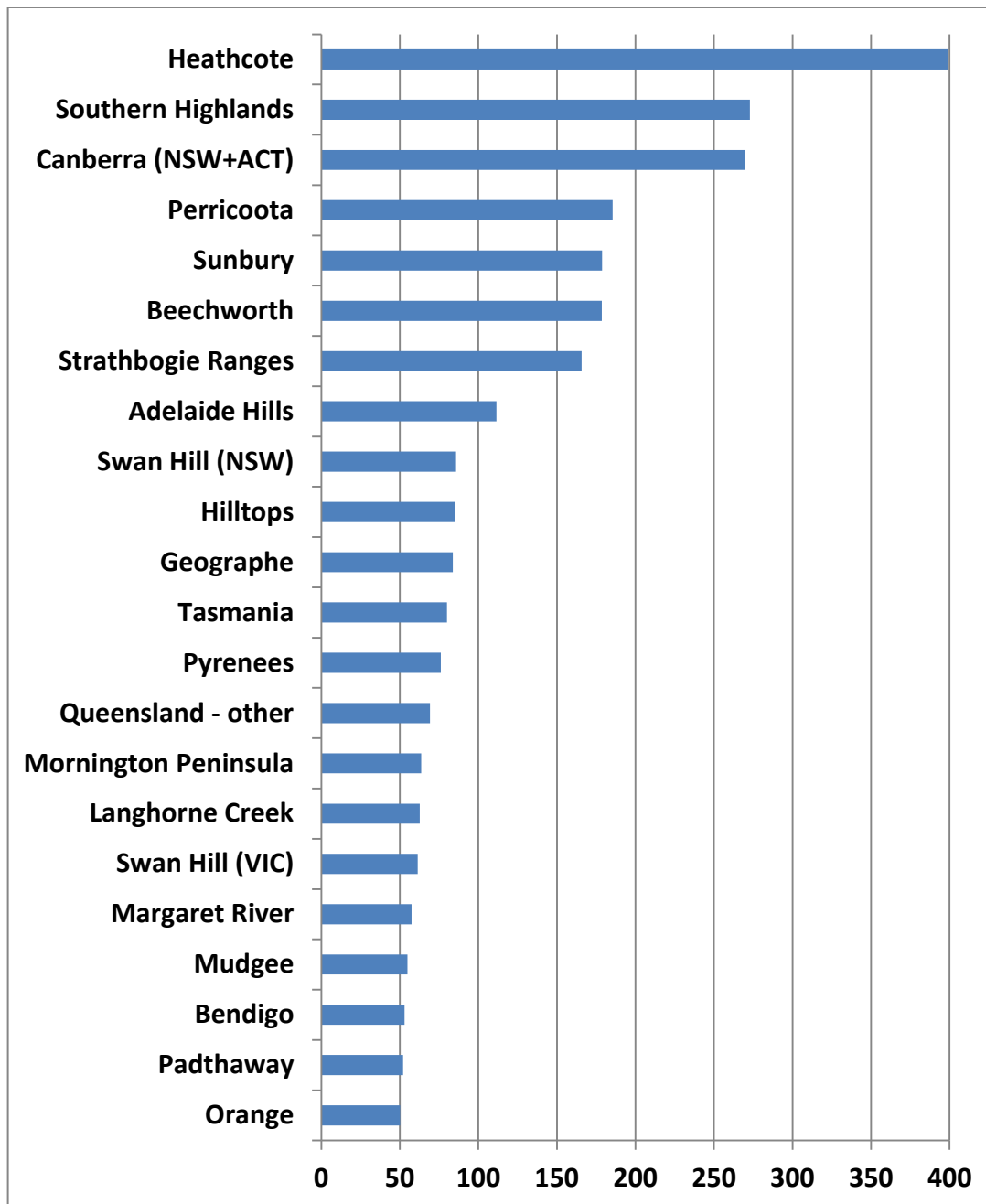
69. Regional diversity in terms of winegrape varieties (Varietal Similarity Index), 2001 and 2010



70. Varietal Similarity Index^a dispersion, 2001 and 2010

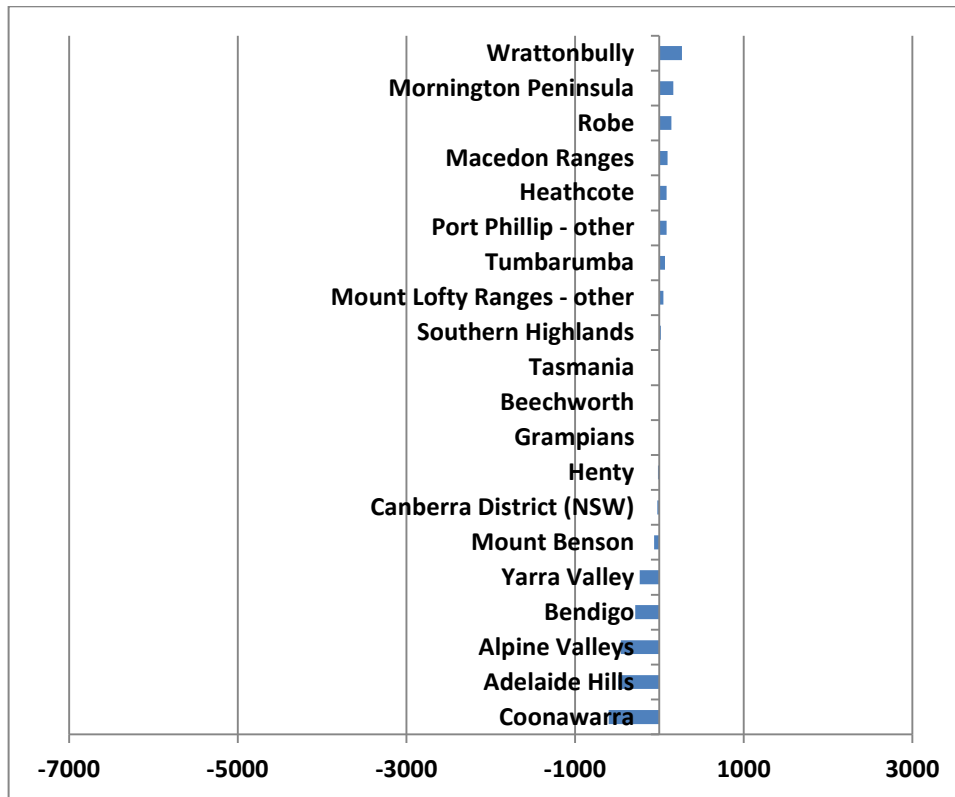


71. Percentage change in winegrape bearing area, by region, 2001 to 2008 (%)

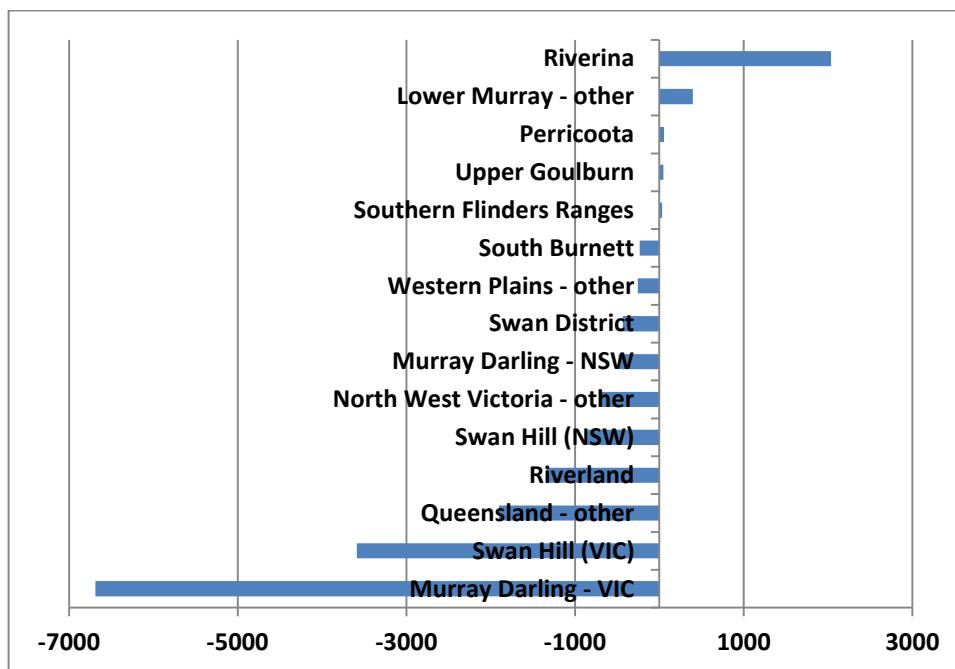


72. Change in winegrape bearing area, by region, 2008 to 2012 (ha)

(a) Cool regions



(b) Hot regions



72(continued) Change in winegrape bearing area, by region, 2008 to 2012 (ha)

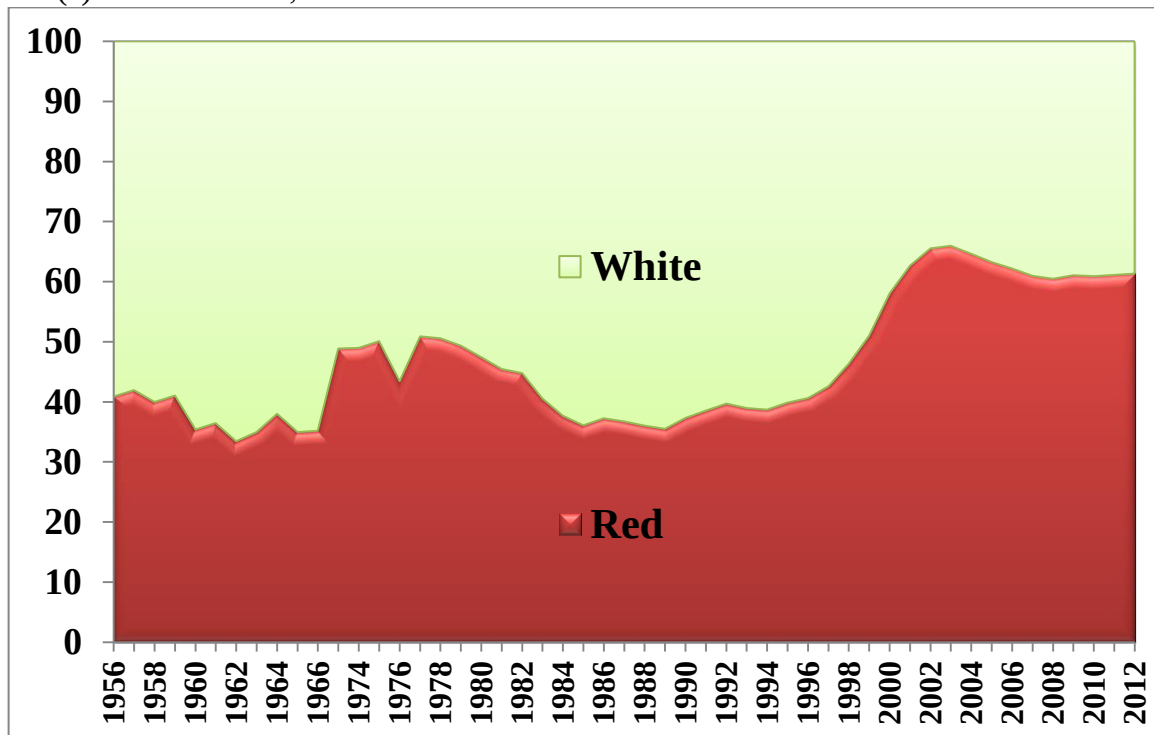
(c) Warm regions



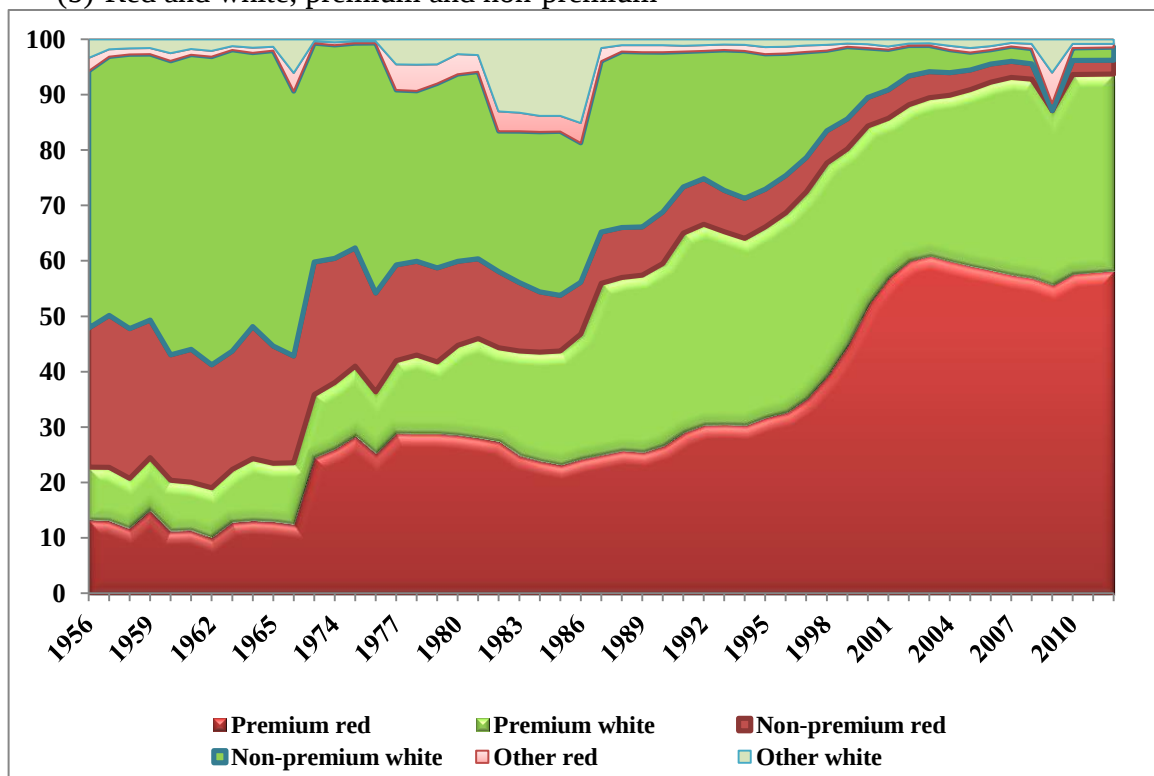
Section III. Winegrape varietal developments since the mid-1950s

73. Shares of Australian winegrape area, by varietal colour and quality, 1956 to 2012

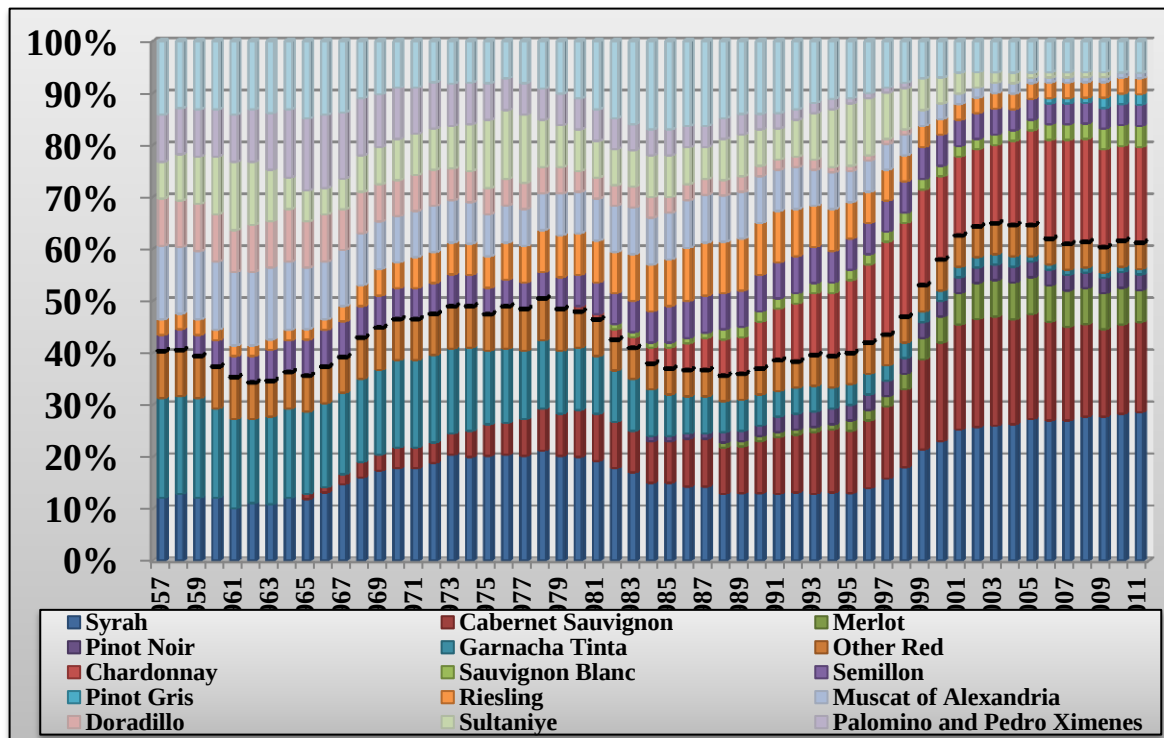
(a) Red and white, total



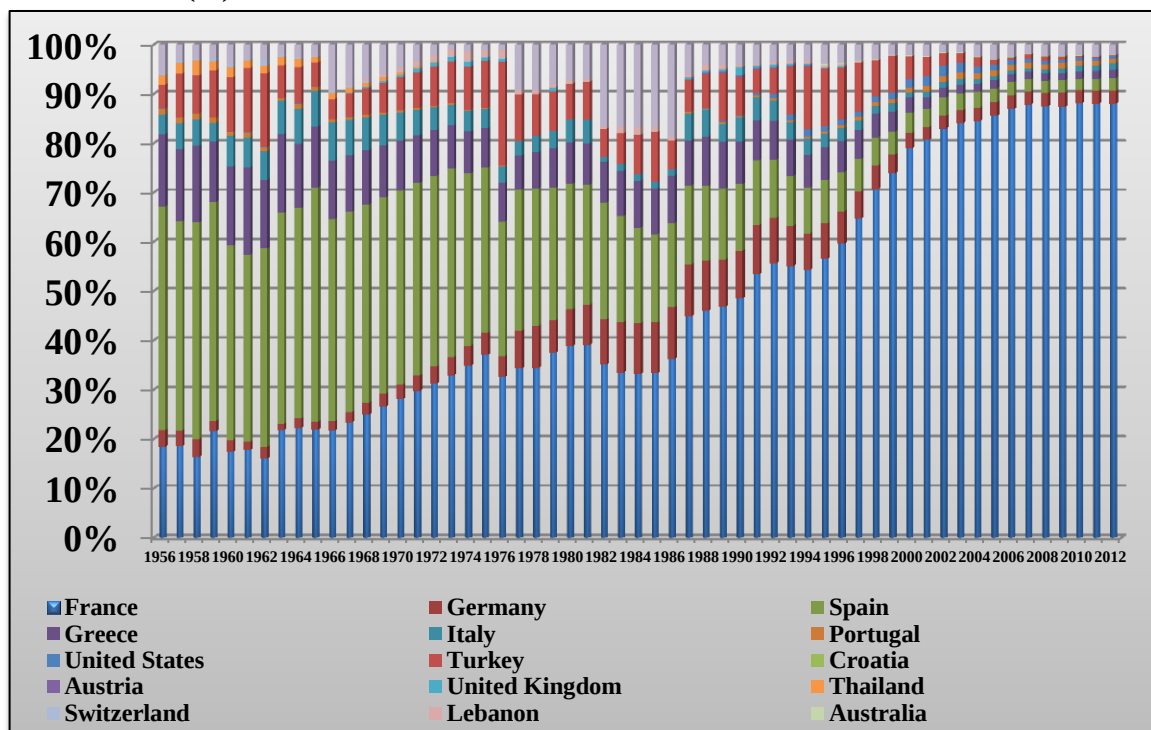
(b) Red and white, premium and non-premium



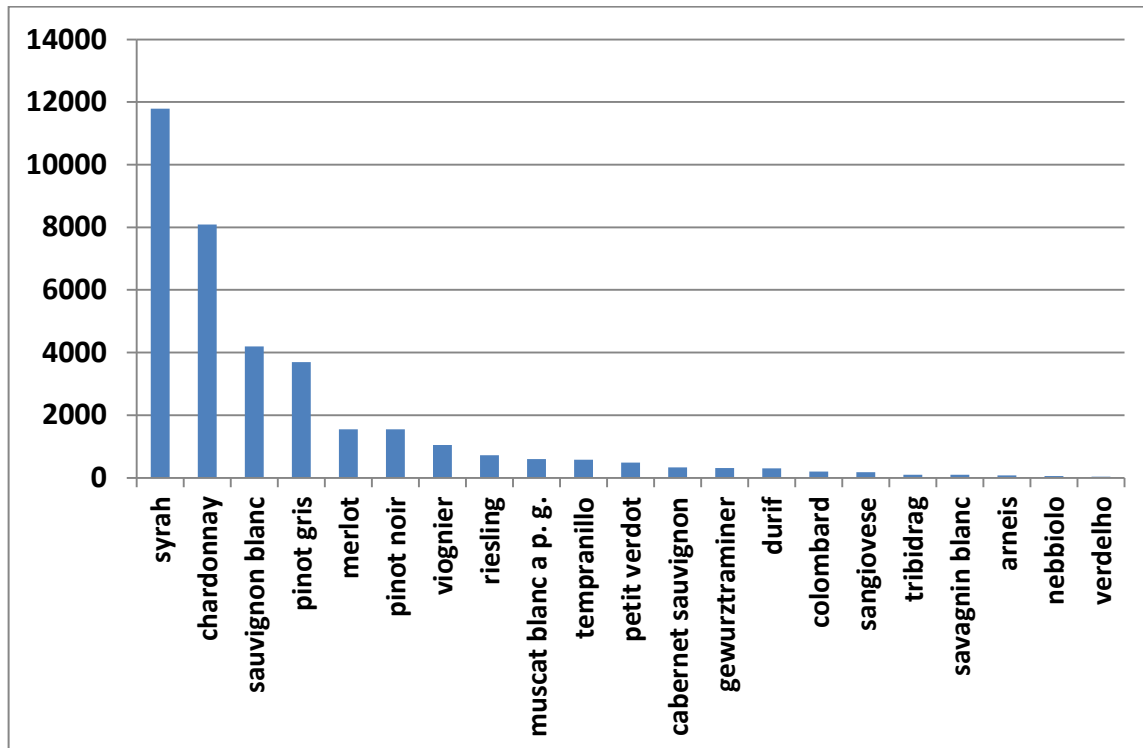
74. Shares of winegrape bearing area, by variety, 1956 to 2012
(%, 3-year moving average)



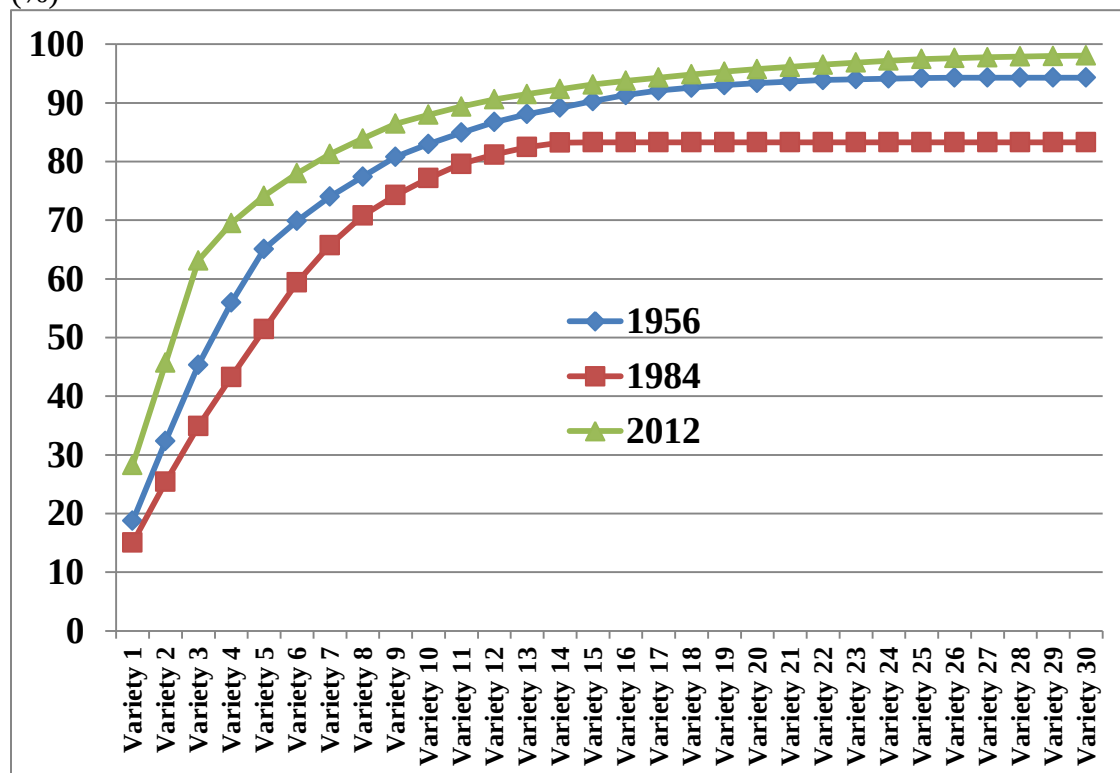
75. Shares of winegrape bearing area, by varietal country of origin, 1956 to 2012 (%)



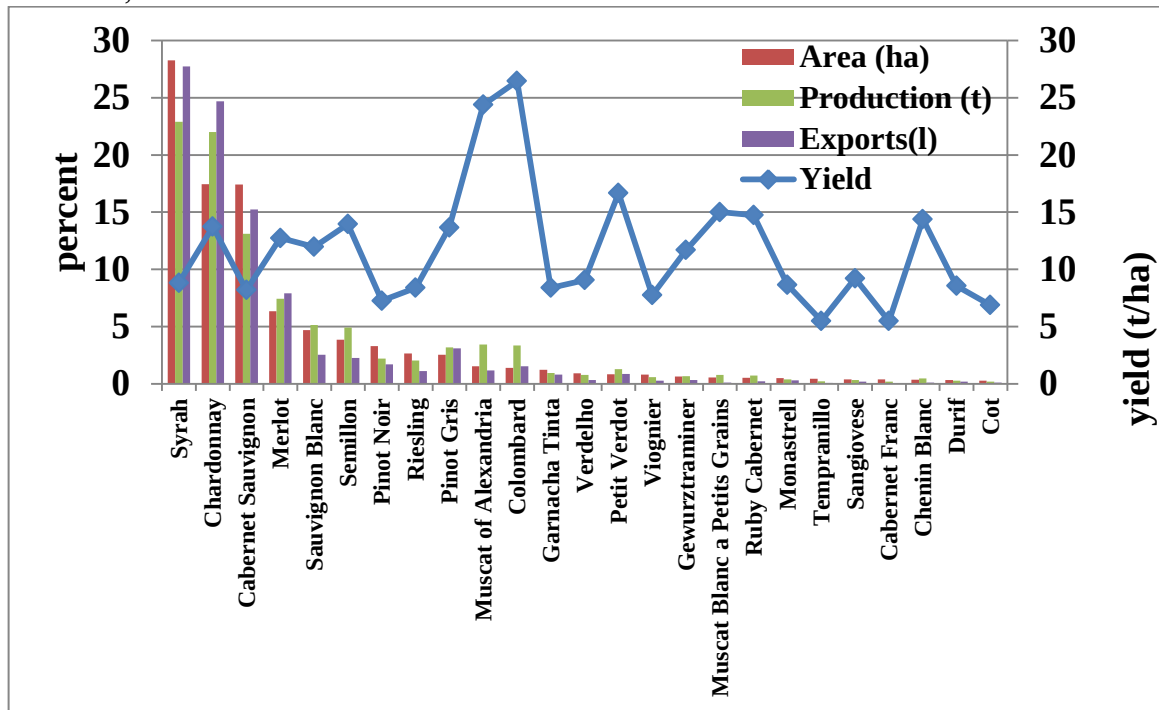
76. Change in bearing area for most-expanded varieties, Australia, 2001 to 2012 (ha)



77. Cumulative shares of Australian winegrape area, by main varieties, 1956, 1984 and 2012 (%)

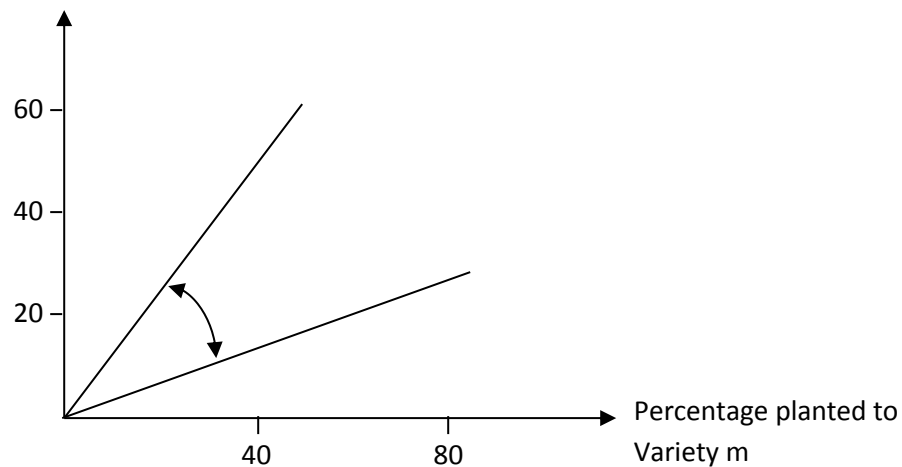


78. Shares of national wine area, production and exports of key varieties, and yield per ha, 2012

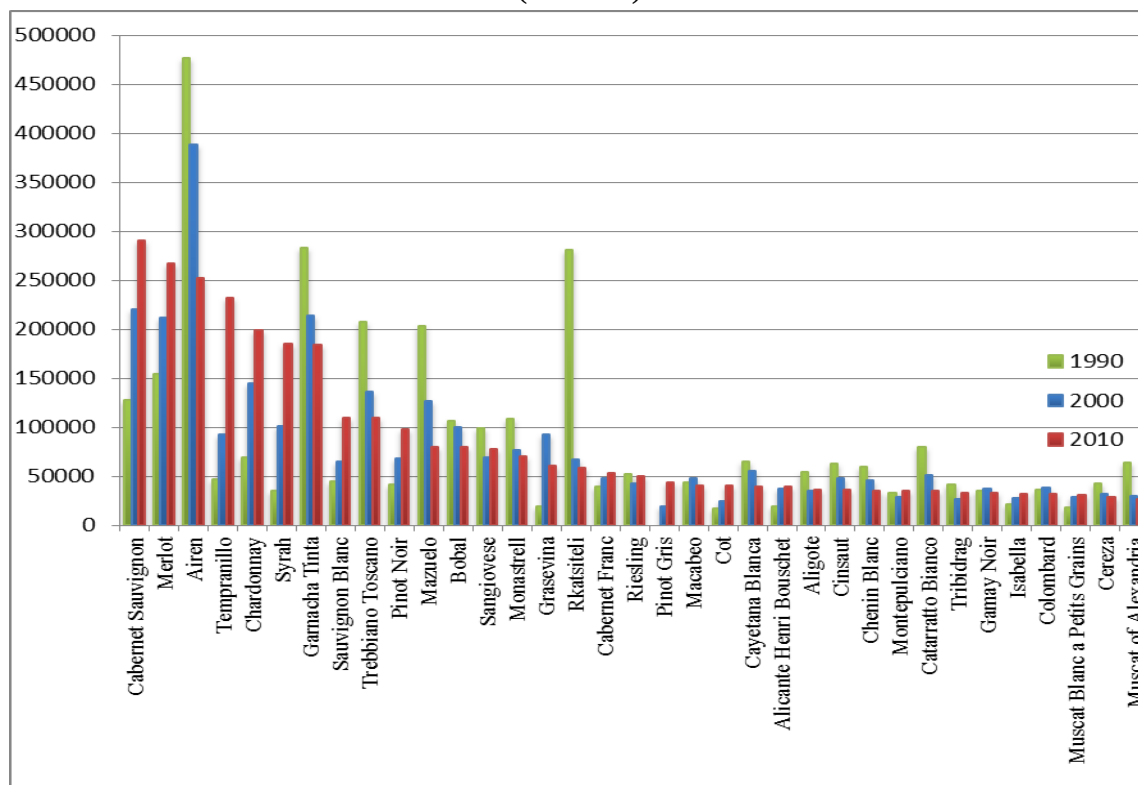


79. Angular separation between two regions, each growing two grape varieties

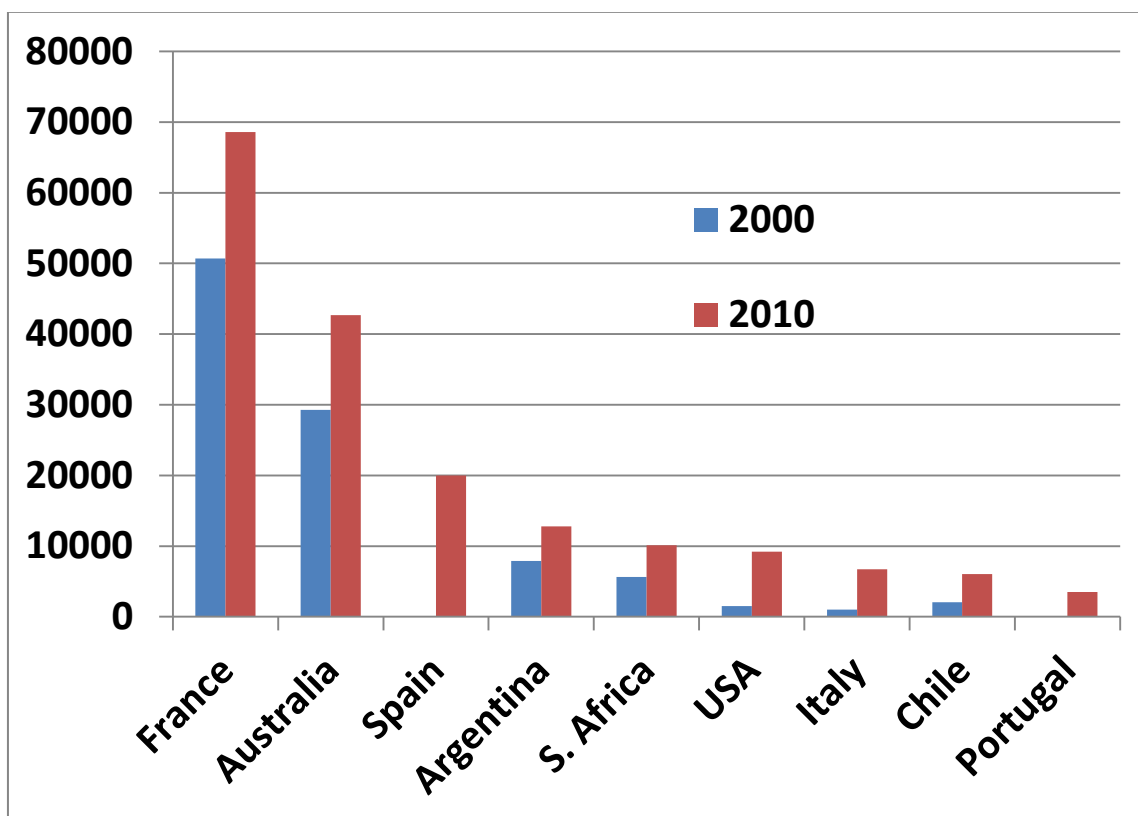
Percentage planted



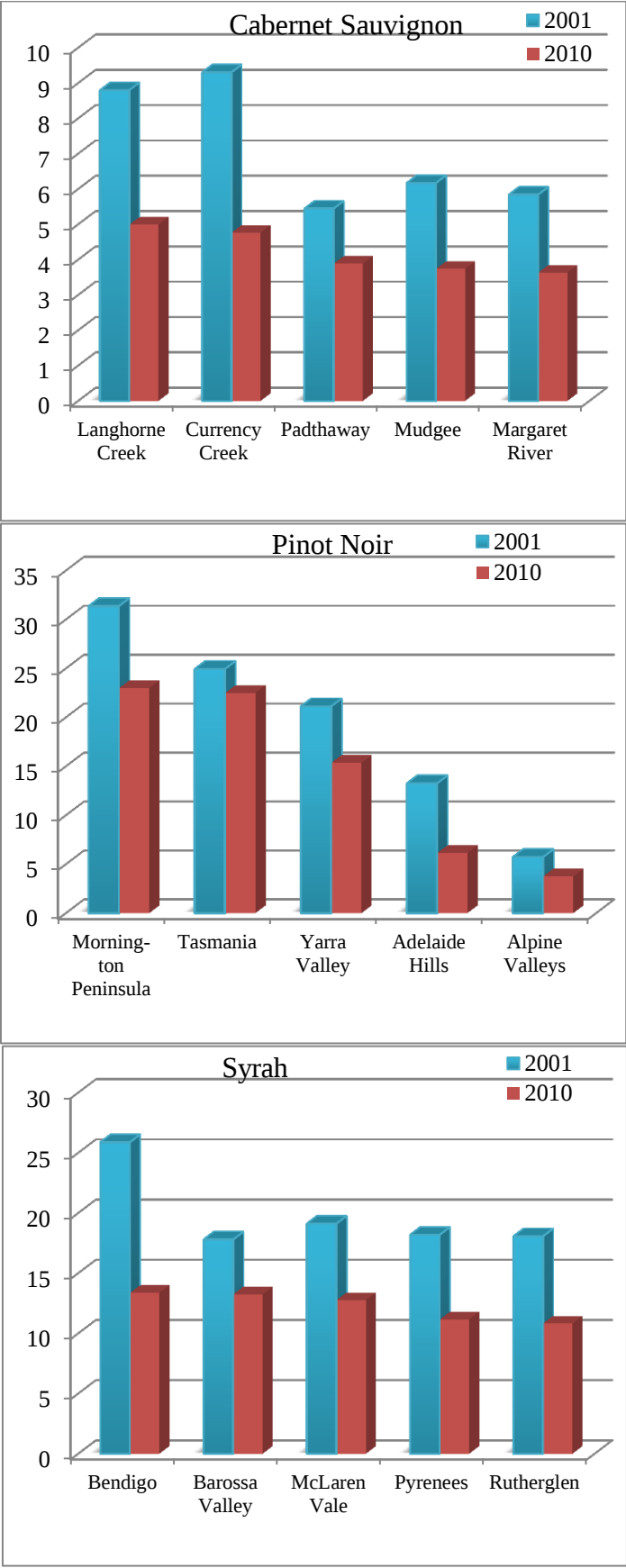
80. World's top 35 varieties in 2010, compared with 1990 and 2000
(hectares)



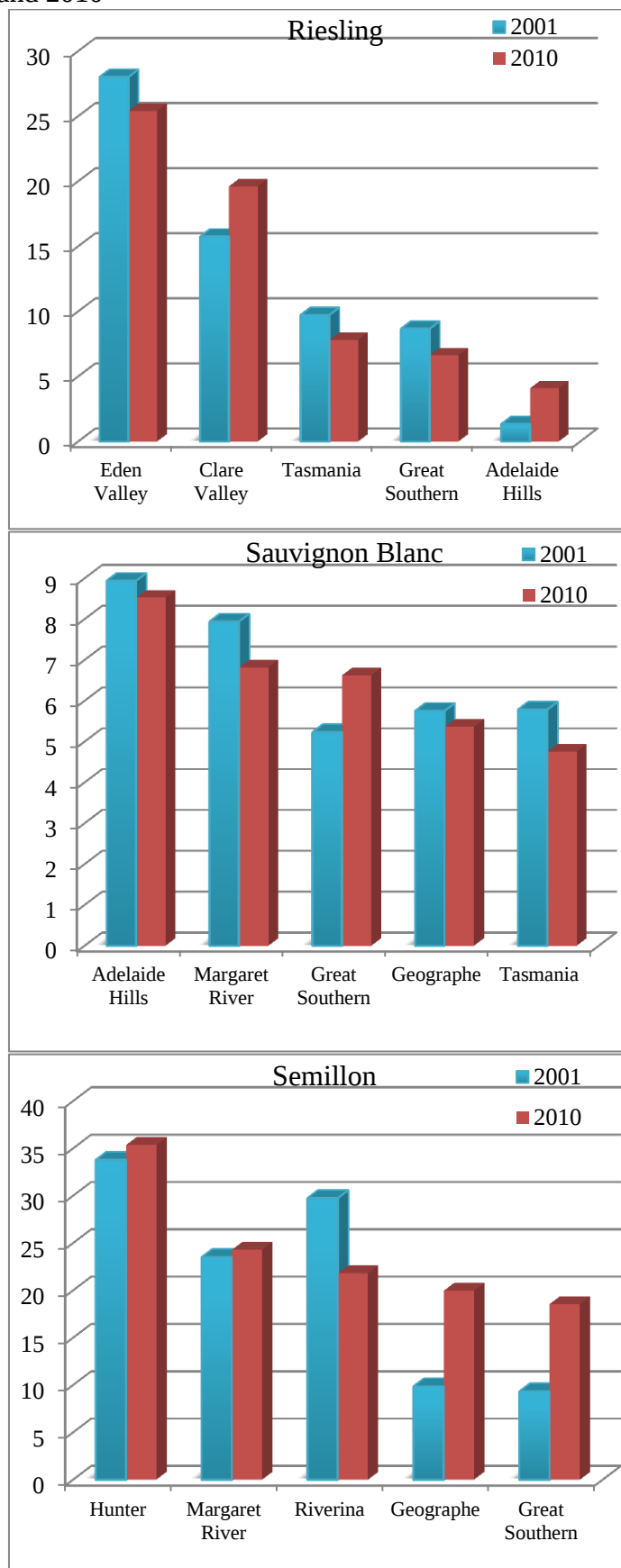
81. Bearing area of Syrah, key producing countries, 2000 and 2010
(hectares)



82. Australian regions with largest Varietal Intensity Index relative to global average, key red varieties, 2001 and 2010

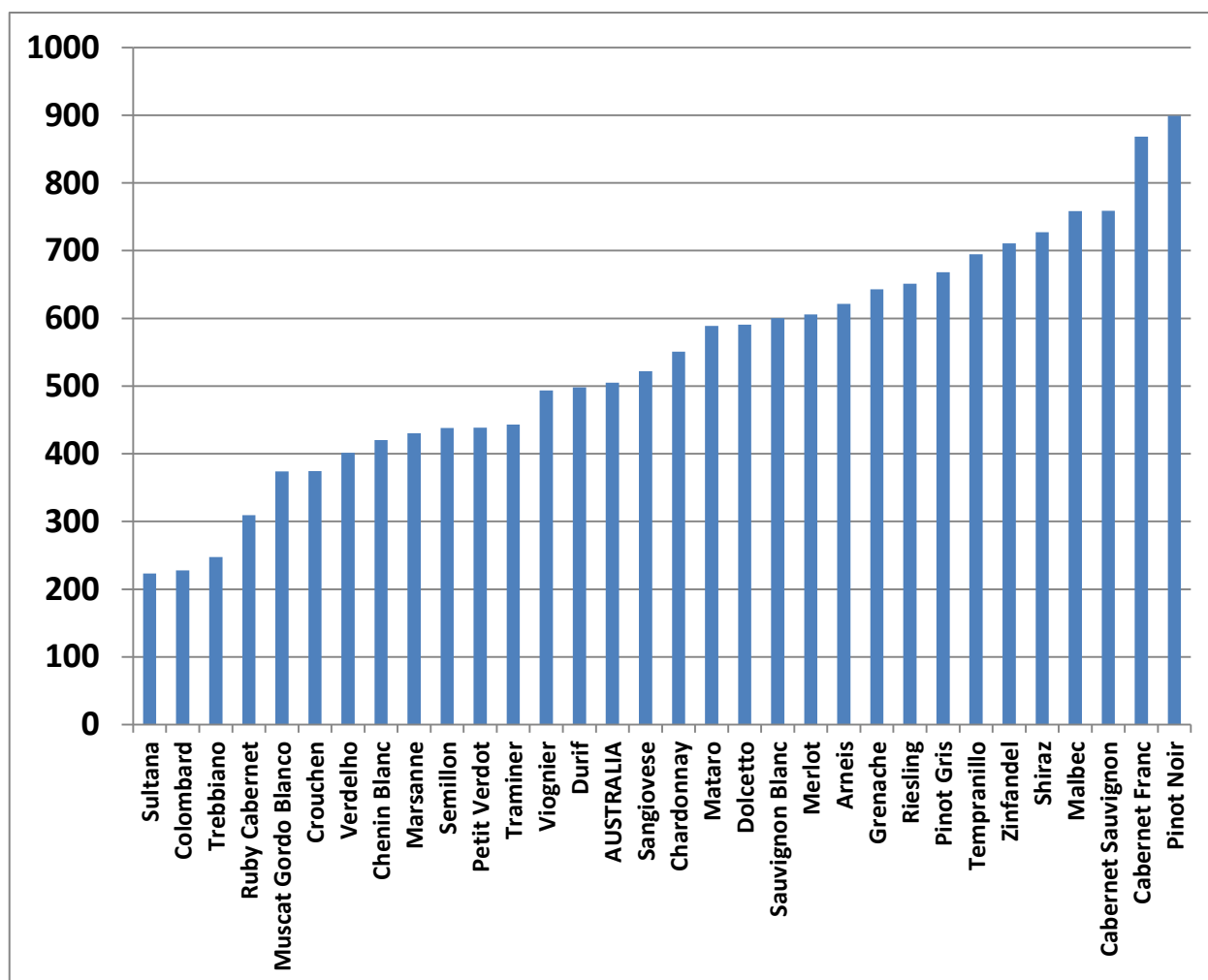


83. Australian regions with largest Varietal Intensity Index relative to global average, key white varieties, 2000 and 2010



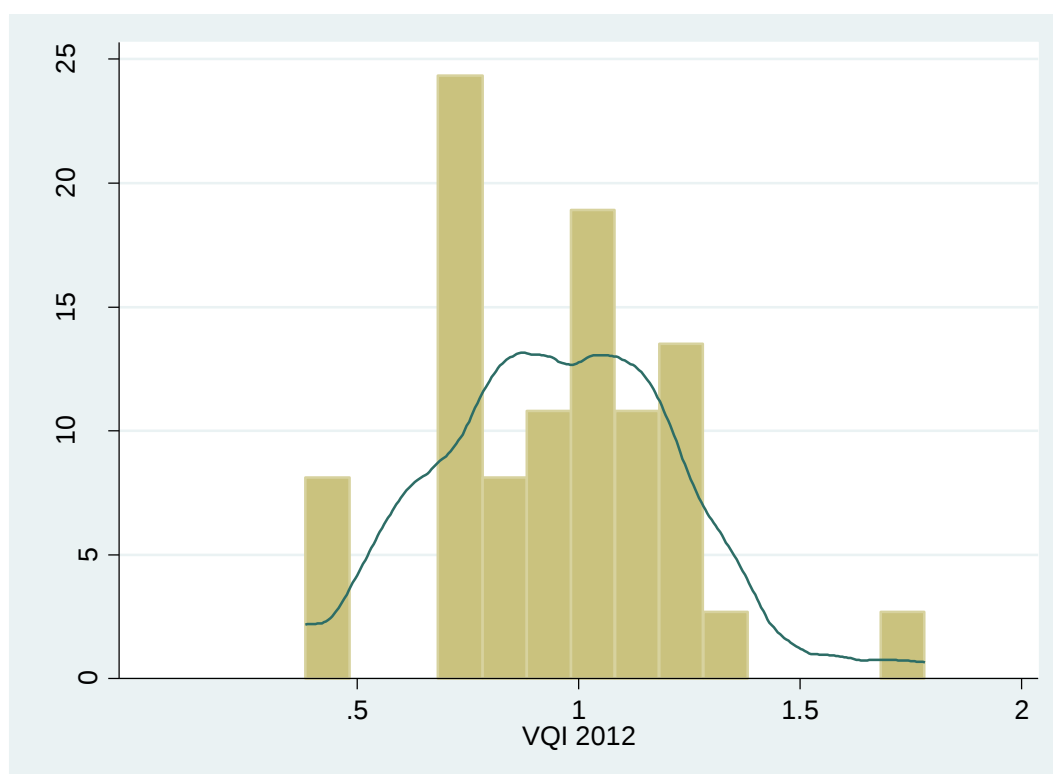
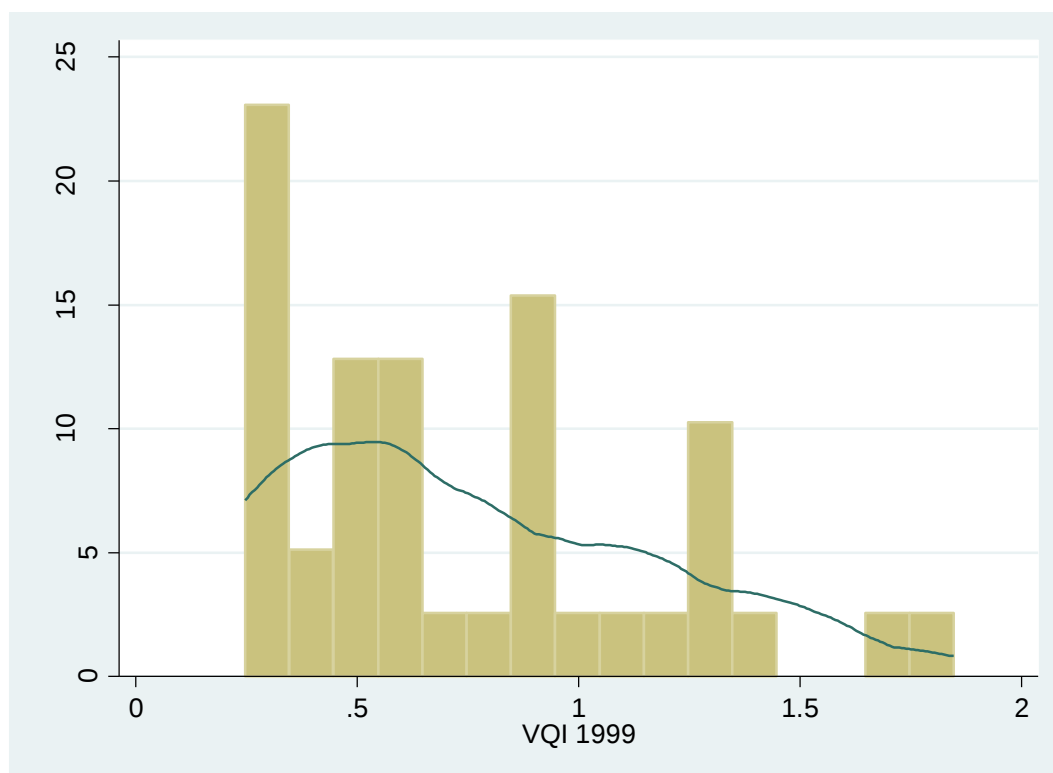
84. National average prices of main winegrape varieties,^a 2013

(AUD per tonne)



^a These are the varieties with the largest bearing area in Australia, using the varietal names most commonly used in Australia (as distinct from the prime varietal names used above).

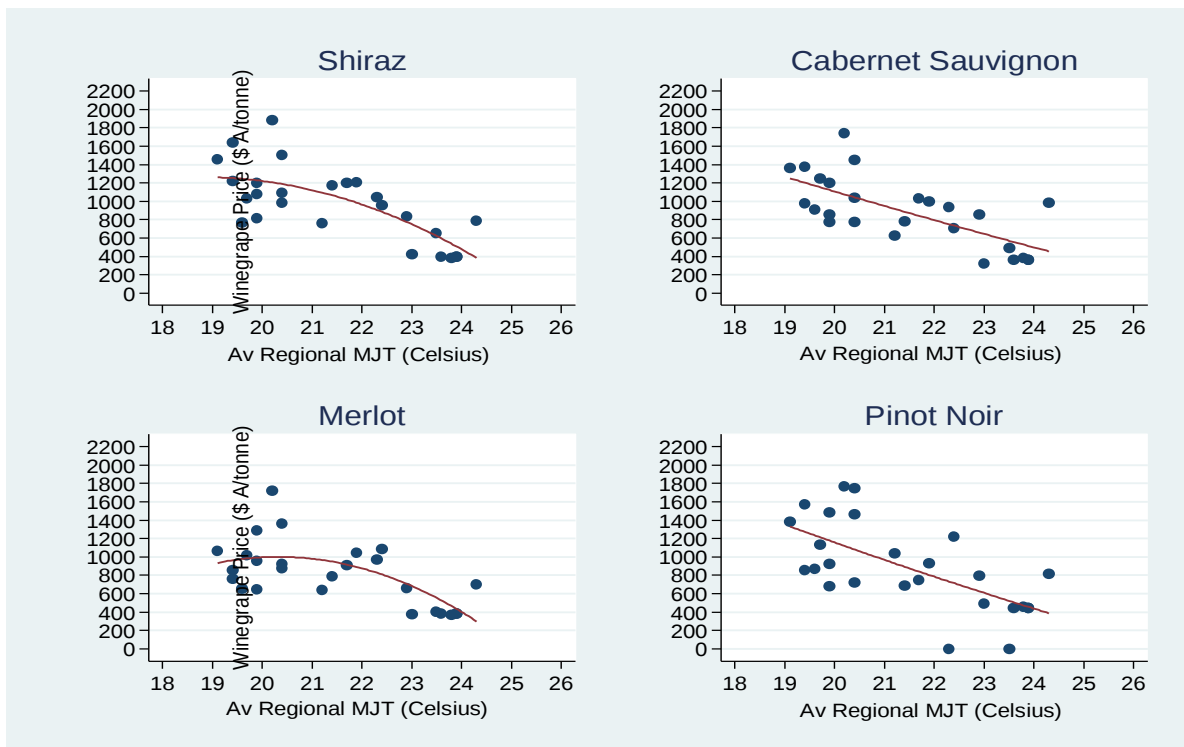
85. Varietal Quality Index^a dispersion, Australia, 1999 and 2012



^a The Varietal Quality Index is defined as the ratio of the national average price for a variety to the national average price of all winegrape varieties.

86. Winegrape price and mean January temperature, select varieties, 2006 (AUD/t)

(a) Key red varieties



(b) Key white varieties

