



Import / Export Report

IMP/EXP 24-11

Published January 13, 2025

Report for Month of: November 2024

The Gomberg-Fredrikson Import / Export Report (Formerly Preview & Supplemental Bulletin - PSB) contains preview and early release schedules and information from The Gomberg-Fredrikson Report and supplemental schedules and analysis covering imports, exports. Distribution of The Gomberg-Fredrikson Import / Export Report is limited to wine marketers, producers, growers and wine industry suppliers and is not made available to the press or public.

Copyright 2025 by Gomberg, Fredrikson & Associates. All rights reserved. No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means (electronic, mechanical, photocopying or otherwise) without the prior written permission of Gomberg, Fredrikson & Associates.



Gomberg, Fredrikson & Associates

584 First Street East, Sonoma, CA 95476 www.GFAWine.com

Phone: 707 940-3922 Fax: 707 940-3930 email: Info@GFAWine.com

Highlights — November 2024

Imports

- Packaged import volumes were up in the month of November (+11%). Trends were bolstered by Bottled Table Wines, Still Wines over 14%, Sparkling Wines, Flavored Wines, Sake, Vermouth, and Cider. The Pandemic, coupled with Tariffs, and ocean freight capacity limits impacted the import wine market significantly. The follow on impact was some building of inventory and then destocking which seems to be ending. For November YTD value of all imports are up 1% and the value of bottled imports are up 1%. Bulk wine volumes are down –26% YTD excluding bulk from Canada.
- For the month of November volumes of Packaged Table Wine Imports were up +11%. In November the key sources showing growth were Italy, Australia, France, and Portugal.
- YTD Packaged Still Wines (Table wines and still wines over 14%) are + 36 million in value (+0.8%).
- Sparkling Wine imports were up +8% YTD in November by volume , with value down –1%. Italy, France, and Spain were up for the month by volume.
- Flavored Beverage Wines such as Sangria and Coolers had been a key driver of volume growth in 2020 and 2021. After two years of decline YTD November volumes are up +3.9 million cases (+30%). Canada is up +19% while Mexico is up +55% YTD versus November 2023.
- Vermouth is up +6% YTD by volume through November. Vermouth had been showing significant growth due to home cocktail consumption but with the On-Premise returning the growth had reversed. It seems for Vermouth we have reached the bottom of inventory adjustments.
- Sake had good growth YTD in November with volume up +17% and value up +14% .
- YTD Bulk wine imports are down –16% in Value and are down –7.0 million 9L cases (-17%) in volume.

Imports—continued

- 60% of the Bulk Imports volume YTD are from Canada. YTD volumes are down –2.1 million 9L cases (-9%) and value is down –10%. These wines are used in spirits products.
- A key driver of growth in other bulk wines used in traditional wines during the pandemic was from France. YTD France only accounted for less than 1% of bulk imports in November.

Exports

- For 12 months ending November 2024 the value of US exports are \$1.266 Billion. This is up +5.0% versus the prior 12 month period.
- YTD bottled wine exports through November are down –636K 9L Cases (-4%) and value is down -\$24.9 Million (-2.0%). Of the top 10 packaged export markets based on value, volume growth is seen to China, The Dominican Republic, and The Netherlands. Value growth is seen to China, The Dominican Republic and The Netherlands.
- YTD Bulk Wine exports are up +61% in volume and up +65% in value. Of the top ten bulk export markets based on value, The United Kingdom, Germany, Denmark, France, The Netherlands, Canada, Sweden, and Japan are showing growth by volume. The United Kingdom, Denmark, Germany, France, Canada, Belgium, The Netherlands, and Sweden are showing growth by value.
- Trade disputes have had a negative impact on US exports. Another key factor has been the strong US dollar that has continued to make US wines less competitive. The currency charts in this report show trends through November 2024. The US Dollar has again strengthened against other currencies which continues to be a head wind for exports moving forward.

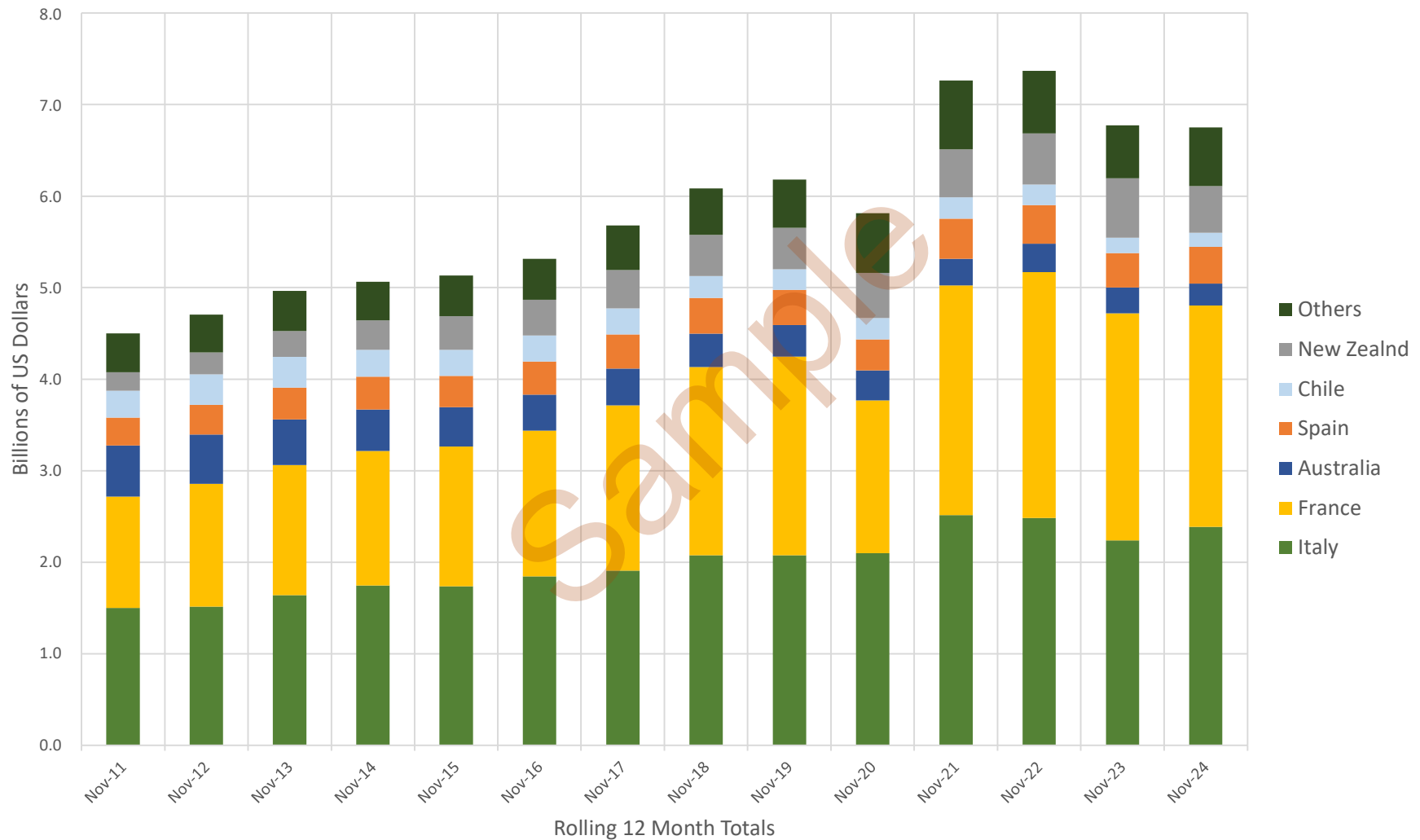


Imported Wine Shipments - 1970 to Present



Source: Department of Commerce. Includes all bulk wines imported, including Canadian. Some bulk wines remained in imported inventories at year-end

Value of Wine Imported Into U.S. 2011 to Present

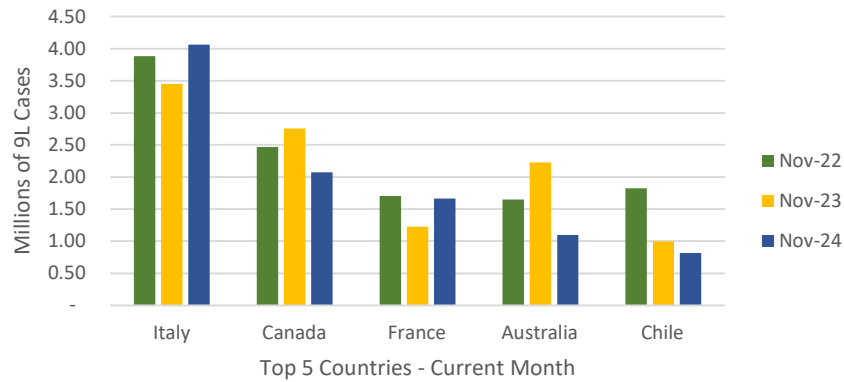


Source: U. S. Department of Commerce.

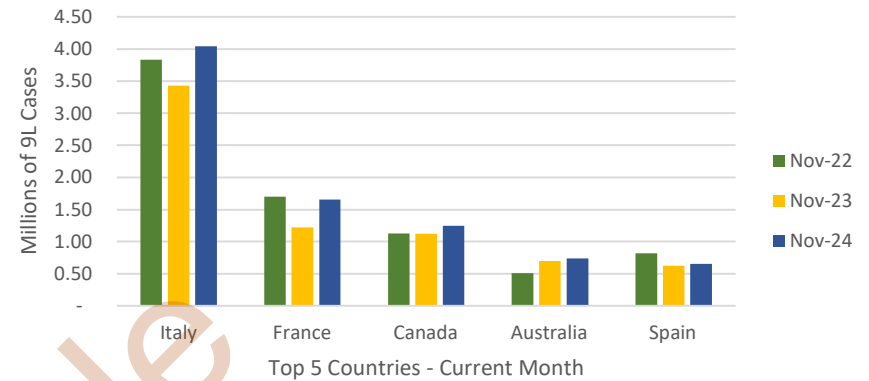


History of Imported Wine Shipments - Summary

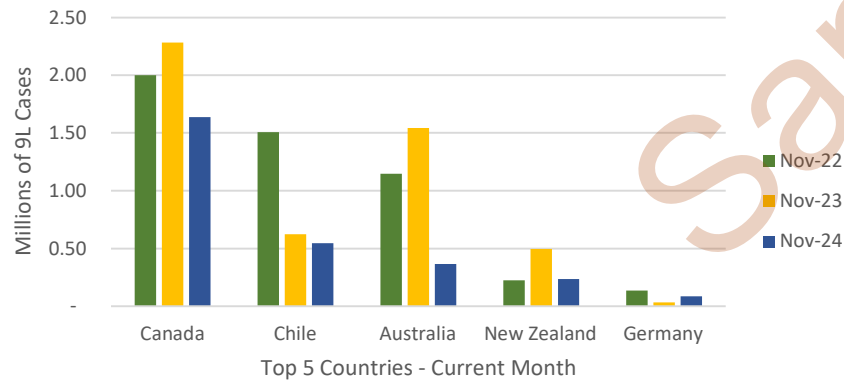
Total Wine Imports - Current Month



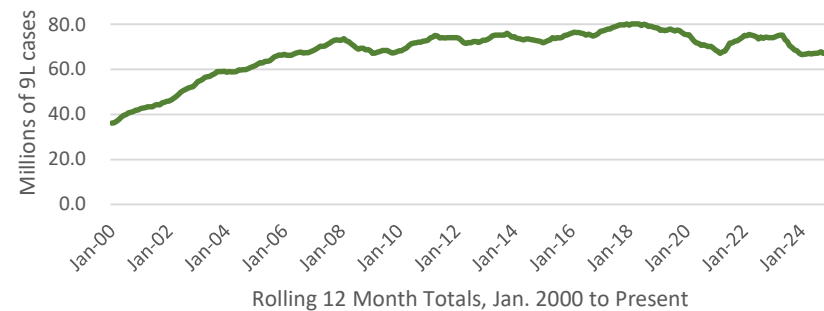
Bottled Wine Imports - Current Month



Bulk Wine Imports - Current Month



U.S. Bottled Table Wine Imports
From All Countries

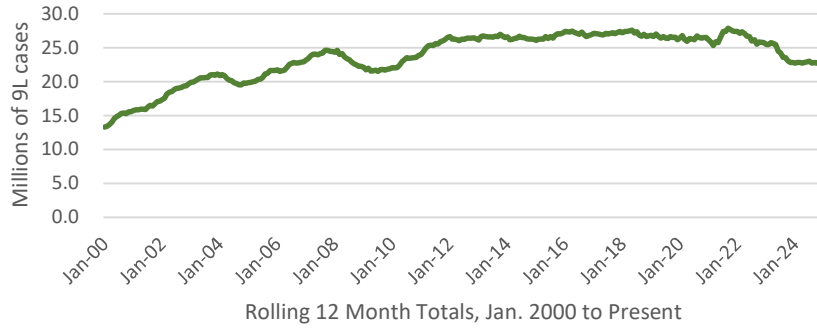


Source: U. S. Department of Commerce.

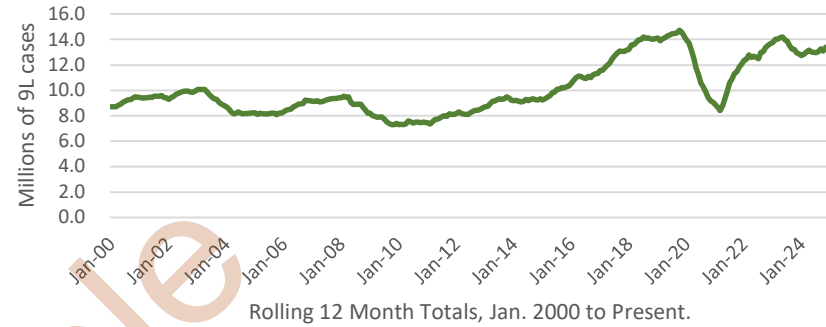


History of Imported Wine Shipments - By Country

U.S. Bottled Table Wine Imports
From Italy



U.S. Bottled Table Wine Imports
From France



U.S. Bottled Table Wine Imports
From Spain



U.S. Bottled Table Wine Imports
From Australia

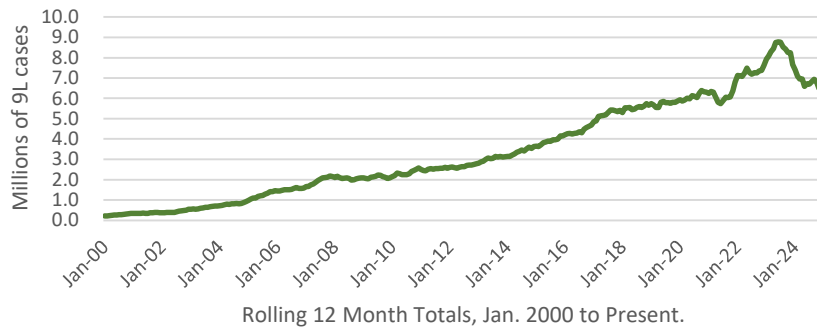


Source: U. S. Department of Commerce.



History of Imported Wine Shipments - By Country

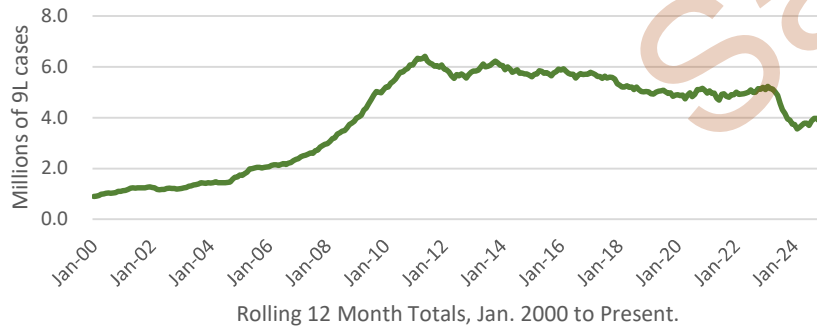
U.S. Bottled Table Wine Imports
From New Zealand



U.S. Bottled Table Wine Imports
From Chile



U.S. Bottled Table Wine Imports
From Argentina



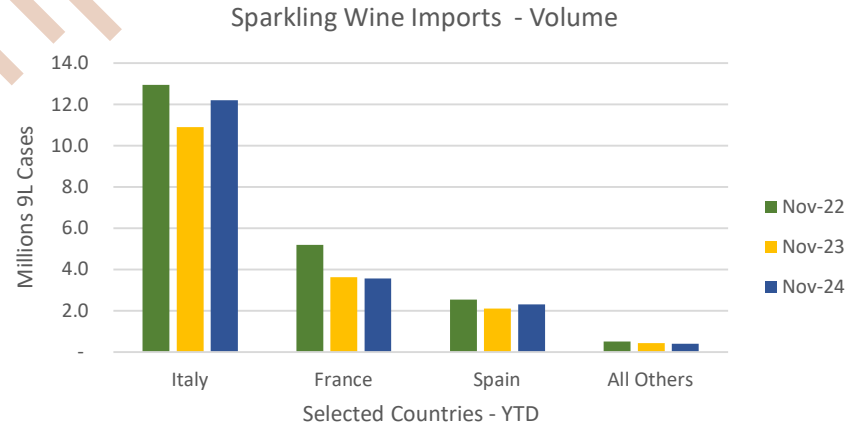
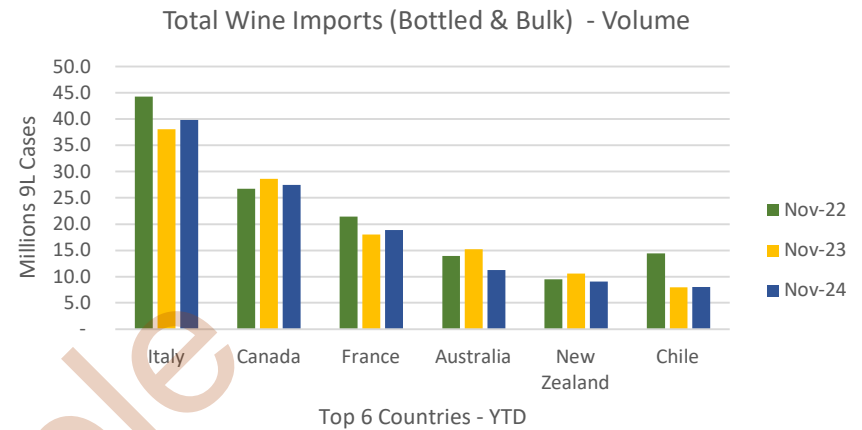
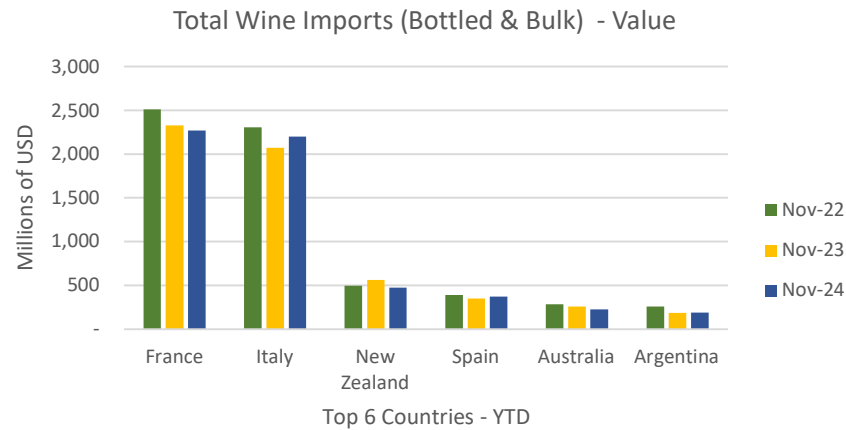
U.S. Bottled Table Wine Imports
From South Africa



Source: U. S. Department of Commerce.



Selected Imported Wine Data - Year to Date



Source: U. S. Department of Commerce.



Imported Wine Shipments by Country of Origin Year to Date Ended November

In Thousands of Dollars and Nine Liter Cases

		Volume This Month			Imported Value Year-to-Date			Case Volume Year-to-Date			
		2023	2024	% Chg	2023	2024	% Chg	2022	2023	2024	% Chg
Italy	Bottled Table Wines	1,788.2	2,008.6	12%	\$ 1,186,936	\$ 1,230,199	4%	23,895.9	20,952.4	21,115.3	1%
	Bulk Still Wines	19.5	21.2	8%	18,490	16,492	-11%	1,199.7	1,043.6	902.3	-14%
	Still Wines Over 14%	81.3	112.3	38%	168,087	190,870	14%	1,274.2	996.4	1,106.9	11%
	Vermouth	352.7	421.1	19%	122,873	127,467	4%	4,208.8	3,590.7	3,835.4	7%
	Sparkling Wine	1,178.1	1,460.6	24%	556,649	614,782	10%	12,950.2	10,911.7	12,202.9	12%
	Sangria / Coolers	31.2	38.9	25%	15,955	21,852	37%	742.9	508.2	667.2	31%
	Total	3,451.1	4,062.8	18%	\$ 2,068,989	\$ 2,201,662	6%	44,271.7	38,002.9	39,830.0	5%
Australia	Bottled Table Wines	661.0	717.5	9%	\$ 170,209	\$ 171,748	1%	6,459.2	6,215.8	6,131.0	-1%
	Bulk Still Wines	1,541.2	361.5	-77%	61,946	33,576	-46%	6,853.8	8,586.0	4,834.0	-44%
	Still Wines Over 14%	18.2	16.5	-9%	22,015	18,207	-17%	422.7	304.9	217.4	-29%
	Sparkling Wine	2.8	0.9	-68%	1,744	1,298	-26%	38.2	32.8	23.1	-30%
	Sangria / Coolers	5.6	1.9	-65%	813	763	-6%	105.0	33.3	28.8	-14%
	Total	2,228.8	1,098.3	-51%	\$ 256,727	\$ 225,592	-12%	13,878.8	15,172.7	11,234.2	-26%
France	Bottled Table Wines	765.4	1,094.8	43%	\$ 1,273,514	\$ 1,340,870	5%	12,881.3	12,138.8	12,679.1	4%
	Bulk Still Wines	6.0	12.0	100%	6,681	9,061	36%	676.3	320.7	300.4	-6%
	Still Wines Over 14%	79.1	72.1	-9%	171,905	131,630	-23%	1,658.4	1,022.9	916.2	-10%
	Vermouth	18.6	37.8	103%	11,325	14,883	31%	309.1	249.1	312.7	26%
	Sparkling Wine	346.9	408.5	18%	855,789	766,527	-10%	5,192.5	3,630.1	3,560.0	-2%
	Sangria / Coolers	0.1	14.2	28228%	1,705	1,226	-28%	71.4	61.4	68.6	12%
	Total	1,216.0	1,639.4	35%	\$ 2,320,919	\$ 2,264,198	-2%	20,789.1	17,423.0	17,836.9	2%
Spain	Bottled Table Wines	233.2	209.8	-10%	\$ 155,534	\$ 162,109	4%	3,325.5	3,010.0	3,228.0	7%
	Bulk Still Wines	22.0	11.4	-48%	2,296	2,600	13%	286.5	188.6	199.1	6%
	Still Wines Over 14%	80.0	66.6	-17%	85,711	85,758	0%	1,482.6	1,080.9	971.1	-10%
	Vermouth	9.6	3.6	-63%	2,038	1,586	-22%	59.6	57.6	35.2	-39%
	Sparkling Wine	228.3	294.8	29%	88,702	102,493	16%	2,536.1	2,107.2	2,302.6	9%
	Sangria / Coolers	57.4	74.8	30%	14,976	17,301	16%	1,268.5	955.7	1,032.9	8%
	Cider	16.3	7.3	-55%	584	540	-8%	56.9	40.7	35.0	-14%
	Total	646.9	668.3	3%	\$ 349,841	\$ 372,386	6%	9,015.7	7,440.8	7,804.0	5%
Chile	Bottled Table Wines	369.0	260.3	-29%	\$ 106,160	\$ 103,525	-2%	3,846.9	3,610.2	4,030.7	12%
	Bulk Still Wines	622.0	547.1	-12%	35,881	27,893	-22%	10,479.9	4,260.9	3,872.5	-9%
	Still Wines Over 14%	3.6	6.1	69%	9,447	8,331	-12%	116.1	60.9	67.0	10%
	Total	994.5	813.4	-18%	\$ 151,488	\$ 139,749	-8%	14,443.0	7,932.1	7,970.3	0%

Continued on next page



Imported Wine Shipments by Country of Origin **Year to Date Ended November**

In Thousands of Dollars and Nine Liter Cases

		Volume This Month			Imported Value Year-to-Date			Case Volume Year-to-Date			
		2023	2024	% Chg	2023	2024	% Chg	2022	2023	2024	% Chg
Germany	Bottled Table Wines	139.3	139.7	0%	\$ 69,857	\$ 65,636	-6%	1,678.5	1,536.2	1,357.1	-12%
	Sparkling Wine	9.7	13.0	34%	3,303	4,276	29%	101.5	100.1	107.2	7%
	Sangria / Coolers	31.5	15.8	-50%	6,863	8,148	19%	516.0	407.7	442.0	8%
	Total	180.5	168.5	-7%	\$ 80,023	\$ 78,060	-2%	2,296.1	2,044.0	1,906.3	-7%
New Zealand	Bottled Table Wines	754.4	461.3	-39%	\$ 467,711	\$ 379,585	-19%	6,551.1	7,176.7	6,021.8	-16%
	Bulk Still Wines	494.8	236.0	-52%	91,480	93,611	2%	2,871.3	3,395.9	3,065.2	-10%
	Total	1,249.3	697.3	-44%	\$ 559,191	\$ 473,197	-15%	9,422.4	10,572.5	9,087.0	-14%
Argentina	Bottled Table Wines	403.5	310.6	-23%	\$ 150,264	\$ 159,448	6%	4,728.6	3,450.9	3,577.8	4%
	Bulk Still Wines	129.1	29.2	-77%	5,001	3,476	-31%	2,156.6	374.5	335.3	-10%
	Still Wines Over 14%	29.3	24.9	-15%	27,206	24,231	-11%	597.6	387.9	369.8	-5%
	Sangria	-	-	++	-	-	++	-	-	-	++
	Total	561.9	364.7	-35%	\$ 182,472	\$ 187,154	3%	7,482.8	4,213.3	4,282.9	2%
Portugal	Bottled Table Wines	176.4	219.2	24%	\$ 61,840	\$ 63,578	3%	2,067.2	1,940.0	2,001.1	3%
	Still Wines Over 14%	41.8	32.4	-22%	46,194	43,913	-5%	497.9	394.2	356.4	-10%
	Total	218.2	251.6	15%	\$ 108,034	\$ 107,490	-1%	2,565.1	2,334.2	2,357.5	1%
South Africa	Bottled Table Wines	47.2	65.3	38%	\$ 33,483	\$ 29,890	-11%	868.5	697.8	605.3	-13%
	Bulk Still Wines	12.1	24.0	99%	7,707	3,033	-61%	2,948.7	691.9	465.1	-33%
	Still Wines Over 14%	3.2	2.7	-15%	3,981	3,514	-12%	44.5	33.7	26.5	-22%
	Sparkling Wine	3.1	4.0	28%	2,011	2,786	39%	37.6	27.2	33.8	24%
	Total	65.6	96.1	46%	\$ 47,181	\$ 39,224	-17%	3,899.3	1,450.7	1,130.7	-22%
Canada	Bulk Still Wines	2,251.5	1,443.1	-36%	\$ 58,948	\$ 52,788	-10%	21,483.7	23,080.5	20,954.0	-9%
	Sangria / Coolers	501.7	626.7	25%	118,672	132,510	12%	5,215.3	5,398.3	6,443.9	19%
	Total	2,753.2	2,069.8	-25%	\$ 177,620	\$ 185,298	4%	26,698.9	28,478.8	27,397.9	-4%
Other	Bottled Table Wines	127.3	134.6	6%	\$ 103,264	\$ 109,302	6%	2,035.7	1,720.7	1,856.1	8%
	Still Wines Over 14%	43.4	189.6	337%	25,136	53,852	114%	344.1	331.3	1,807.2	445%
	Sangria / Coolers	580.1	659.1	14%	68,584	108,473	58%	6,986.9	5,550.3	8,136.8	47%
	Cider	6.2	28.7	360%	6,891	7,986	16%	623.4	509.0	587.5	15%
	Sake	88.7	100.6	13%	74,029	83,824	13%	1,470.3	1,075.1	1,261.1	17%
	Total	845.7	1,112.6	32%	\$ 277,904	\$ 363,436	31%	11,460.4	9,186.5	13,648.7	49%

Continued on next page



Imported Wine Shipments by Country of Origin Year to Date Ended November

In Thousands of Dollars and Nine Liter Cases

		Volume This Month			Imported Value Year-to-Date			Case Volume Year-to-Date			
		2023	2024	% Chg	2023	2024	% Chg	2022	2023	2024	% Chg
World Total	Bottled Table Wines	5,470.9	5,625.8	3%	\$ 3,784,093	\$ 3,819,745	1%	68,410.5	62,535.2	62,645.1	0%
	Bulk Still Wines	5,102.9	2,685.8	-47%	\$ 290,421	\$ 243,984	-16%	49,112.2	42,028.6	35,005.1	-17%
	Still Wines Over 14%	381.3	523.8	37%	\$ 561,001	\$ 561,452	0%	6,451.0	4,621.8	5,845.5	26%
	Total Still Wines	10,955.1	8,835.4	-19%	\$ 4,635,515	\$ 4,625,181	0%	123,973.7	109,185.6	103,495.8	-5%
	Vermouth	390.3	476.9	22%	\$ 140,132	\$ 147,354	5%	4,785.1	4,020.7	4,277.8	6%
	Sparkling Wine	1,794.5	2,203.9	23%	\$ 1,521,756	\$ 1,504,069	-1%	21,191.3	17,074.2	18,457.3	8%
	Sangria / Coolers	1,207.7	1,438.2	19%	\$ 227,981	\$ 291,732	28%	14,918.6	12,927.1	16,857.8	30%
	Cider	34.9	64.5	85%	\$ 14,286	\$ 13,519	-5%	1,340.6	1,209.2	1,668.4	38%
	Sake	88.7	101.0	14%	\$ 74,216	\$ 84,395	14%	1,470.5	1,076.8	1,262.3	17%
	Total All Wines	14,471.3	13,119.9	-9%	\$ 6,613,886	\$ 6,666,249	1%	167,679.9	145,493.6	146,019.3	0%
	Bottled Wine Only*	9,333.5	10,369.6	11%	\$ 6,309,179	\$ 6,408,746	2%	117,227.1	102,255.7	109,345.8	7%
	Bulk Wines ex Canada	2,851.5	1,242.7	-56%	\$ 231,472	\$ 191,196	-17%	27,628.5	18,948.2	14,051.1	-26%

Source: US Dept. of Commerce *Excludes Cider



Summary of Year to Date Imports to the U.S. Imported Wines, by Country of Origin

Expressed in Thousands of Dollars and Nine Liter Cases (ranked on value)

Value in Dollars				Shipments in Cases			\$ / 9L	
2023	2024	% Chg		2023	2024	% Chg	2023	2024
Bottled Table Wines								
1,273,514	1,340,870	5%	France	12,138.8	12,679.1	4%	104.91	105.75
1,186,936	1,230,199	4%	Italy	20,952.4	21,115.3	1%	56.65	58.26
467,711	379,585	-19%	New Zealand	7,176.7	6,021.8	-16%	65.17	63.04
170,209	171,748	1%	Australia	6,215.8	6,131.0	-1%	27.38	28.01
155,534	162,109	4%	Spain	3,010.0	3,228.0	7%	51.67	50.22
150,264	159,448	6%	Argentina	3,450.9	3,577.8	4%	43.54	44.57
106,160	103,525	-2%	Chile	3,610.2	4,030.7	12%	29.41	25.68
69,857	65,636	-6%	Germany	1,536.2	1,357.1	-12%	45.47	48.36
61,840	63,578	3%	Portugal	1,940.0	2,001.1	3%	31.88	31.77
33,483	29,890	-11%	South Africa	697.8	605.3	-13%	47.99	49.38
19,377	25,071	29%	Israel	224.4	283.2	26%	86.35	88.54
21,510	19,691	-8%	Austria	359.4	332.1	-8%	59.85	59.30
15,514	16,225	5%	Greece	232.6	233.4	0%	66.70	69.52
4,445	6,502	46%	Georgia	77.5	123.9	60%	57.37	52.48
3,446	6,143	78%	Switzerland	44.8	94.8	112%	76.93	64.83
4,459	5,110	15%	Mexico	41.9	46.0	10%	106.31	111.13
5,321	3,855	-28%	Canada	85.7	42.0	-51%	62.09	91.79
3,769	3,639	-3%	Slovenia	83.7	81.0	-3%	45.04	44.94
3,922	3,179	++	Hungary	73.7	54.9	++	53.22	57.88
1,411	2,556	++	Moldova	56.4	90.8	61%	25.03	28.15
25,410	21,185	-17%	Others	526.3	516.1	-2%	48.28	41.05
3,784,093	3,819,745	1%	Total	62,535.2	62,645.1	0%	60.51	60.97



Summary of Year to Date Imports to the U.S. Imported Wines, by Country of Origin

Expressed in Thousands of Dollars and Nine Liter Cases (ranked on value)

Value in Dollars			Shipments in Cases			\$ / 9L	
2023	2024	% Chg		2023	2024	% Chg	
Bulk Still Wines							
91,480	93,611	2%	New Zealand	3,395.9	3,065.2	-10%	26.94
58,948	52,788	-10%	Canada	23,080.5	20,954.0	-9%	2.55
61,946	33,576	-46%	Australia	8,586.0	4,834.0	-44%	7.21
35,881	27,893	-22%	Chile	4,260.9	3,872.5	-9%	8.42
18,490	16,492	-11%	Italy	1,043.6	902.3	-14%	17.72
6,681	9,061	36%	France	320.7	300.4	-6%	20.84
5,001	3,476	-31%	Argentina	374.5	335.3	-10%	13.35
7,707	3,033	-61%	South Africa	691.9	465.1	-33%	11.14
2,296	2,600	13%	Spain	188.6	199.1	6%	12.17
1,990	1,455	-27%	Others	86.0	77.0	-10%	23.14
290,421	243,984	-16%	Total	42,028.6	35,005.1	-17%	6.91
Sparkling Wines							
855,789	766,527	-10%	France	3,630.1	3,560.0	-2%	235.75
556,649	614,782	10%	Italy	10,911.7	12,202.9	12%	51.01
88,702	102,493	16%	Spain	2,107.2	2,302.6	9%	42.09
3,303	4,276	29%	Germany	100.1	107.2	7%	32.99
2,011	2,786	39%	South Africa	27.2	33.8	24%	73.85
2,058	1,834	-11%	Argentina	56.6	52.6	-7%	36.39
1,744	1,298	-26%	Australia	32.8	23.1	-30%	53.18
1,649	1,165	-29%	Austria	23.5	16.5	-30%	70.05
9,852	8,906	-10%	Others	185.0	158.7	-14%	53.27
1,521,756	1,504,069	-1%	Total	17,074.2	18,457.3	8%	89.13



Summary of Year to Date Imports to the U.S. Imported Wines, by Country of Origin

Expressed in Thousands of Dollars and Nine Liter Cases (ranked on value)

Value in Dollars				Shipments in Cases			\$ / 9L	
2023	2024	% Chg		2023	2024	% Chg	2023	2024
Still Wines Over 14%								
168,087	190,870	14%	Italy	996.4	1,106.9	11%	168.70	172.44
171,905	131,630	-23%	France	1,022.9	916.2	-10%	168.06	143.68
85,711	85,758	0%	Spain	1,080.9	971.1	-10%	79.29	88.31
46,194	43,913	-5%	Portugal	394.2	356.4	-10%	117.20	123.21
2,002	33,359	++	Moldova	84.9	1,567.9	++	23.56	21.28
27,206	24,231	-11%	Argentina	387.9	369.8	-5%	70.14	65.53
22,015	18,207	-17%	Australia	304.9	217.4	-29%	72.21	83.76
11,157	10,875	-3%	Israel	50.6	47.4	-6%	220.70	229.59
9,447	8,331	-12%	Chile	60.9	67.0	10%	155.12	124.28
17,277	14,279	-17%	Others	238.3	225.5	-5%	72.51	63.32
561,001	561,452	0%	Total	4,621.8	5,845.5	26%	121.38	96.05
Sangria / Coolers								
118,672	132,510	12%	Canada	5,398.3	6,443.9	19%	21.98	20.56
45,716	76,578	68%	Mexico	4,160.8	6,460.8	55%	10.99	11.85
15,955	21,852	37%	Italy	508.2	667.2	31%	31.39	32.75
14,976	17,301	16%	Spain	955.7	1,032.9	8%	15.67	16.75
8,875	9,800	10%	Netherlands	597.0	610.5	2%	14.87	16.05
23,787	33,691	42%	Others	1,307.1	1,642.5	26%	18.20	20.51
227,981	291,732	28%	Total	12,927.1	16,857.8	30%	17.64	17.31



Summary of Year to Date Imports to the U.S. Imported Wines, by Country of Origin

Expressed in Thousands of Dollars and Nine Liter Cases (ranked on value)

Value in Dollars				Shipments in Cases				\$ / 9L	
2023	2024	% Chg		2023	2024	% Chg		2023	2024
Cider									
4,943	5,135	4%	United Kingdom	324.7	400.9	23%		15.22	12.81
5,724	4,585	-20%	France	608.8	1,031.0	69%		9.40	4.45
643	1,847	187%	Ireland	103.7	125.5	21%		6.21	14.72
1,080	705	-35%	Sweden	67.4	46.2	-31%		16.03	15.28
1,896	1,248	-34%	Others	104.8	64.9	-38%		18.10	19.21
14,286	13,519	-5%	Total	1,209.2	1,668.4	38%		11.81	8.10
Vermouth									
122,873	127,467	4%	Italy	3,590.7	3,835.4	7%		34.22	33.23
11,325	14,883	31%	France	249.1	312.7	26%		45.46	47.60
2,038	1,586	-22%	Spain	57.6	35.2	-39%		35.39	45.00
3,895	3,418	-12%	Others	123.3	94.4	-23%		31.59	36.20
140,132	147,354	5%	Total	4,020.7	4,277.8	6%		34.85	34.45
Sake									
69,251	79,621	15%	Japan	758.9	928.2	22%		91.25	85.78
3,751	3,505	-7%	Korea, South	280.6	300.9	7%		13.37	11.65
188	568	++	France	1.6	1.2	-29%		114.22	484.75
1,027	701	-32%	Others	35.6	32.0	-10%		28.84	21.89
74,216	84,395	14%	Total	1,076.8	1,262.3	17%		68.93	66.86
6,613,886	6,666,249	1%	Total Imported Wines	145,493.6	146,019.3	0%		45.46	45.65
6,323,465	6,422,265	2%	Total Packaged Wines	103,464.9	111,014.2	7%		61.12	57.85
231,472	191,196	-17%	Bulk Imports ex Canada	18,948.2	14,051.1	-26%		12.22	13.61
58,948	52,788	-10%	Bulk Imports from Canada	23,080.5	20,954.0	-9%		2.55	2.52

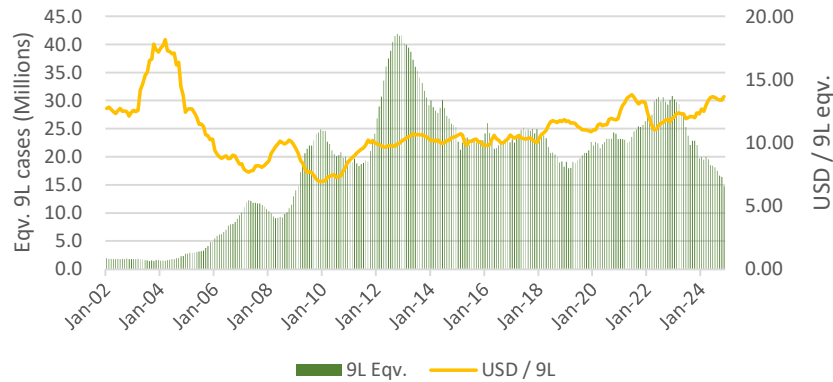
Source: U.S. Department of Commerce

Bulk Imports from Canada used in Spirits Products

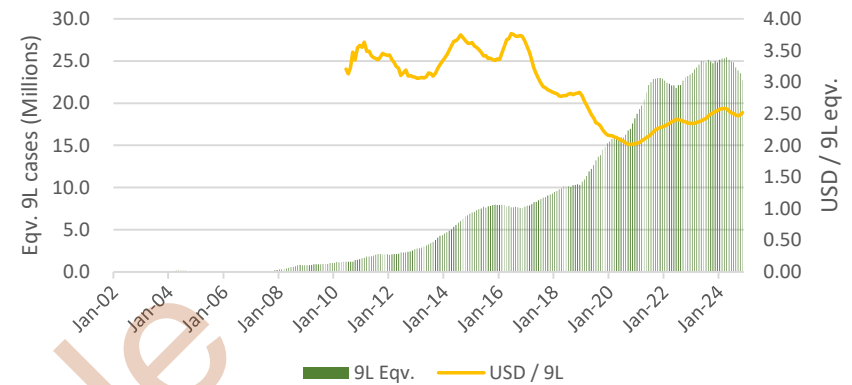


Last Twelve Months Bulk Import Trends

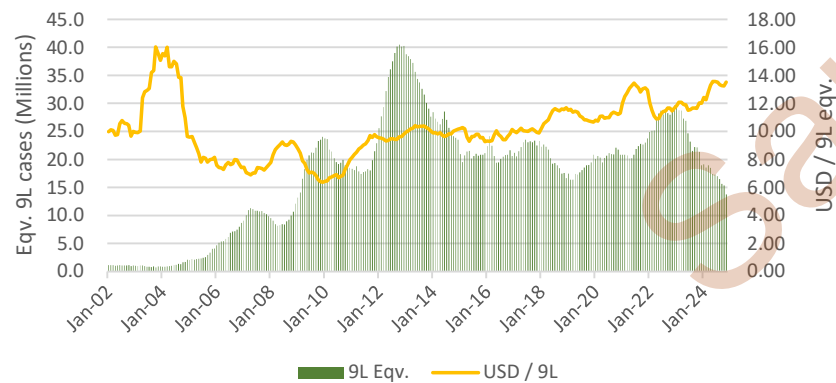
Bulk Wine Imports ex Canada



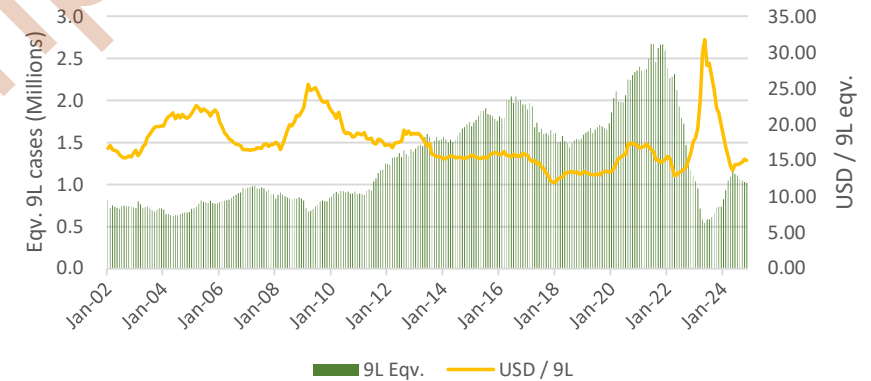
Bulk Imports from Canada



Bulk Imports to California



Bulk Imports to Other States



The majority of bulk imports to the US go into Wines bottled in the US.

The one exception to this are bulk imports from Canada which are primarily used by distilled spirits producers to qualify for the 5010 tax credit.

Gomberg & Fredrikson includes the Canadian bulk wine imports to report on total imports but will exclude from ultimate shipments into the market.

Excluding Canadian bulk imports, California accounts for roughly 90% of all bulk imports into the US.



Summary Year to Date Imports by Color Bottled Table Wines (Less than or equal to 14% ABV)

In Thousands of Nine Liter Cases

Country	Red Wine		
	LYTD	YTD	% Chg
Italy	8,040.1	8,302.7	3%
France	4,369.4	4,611.8	6%
Australia	2,674.2	2,513.1	-6%
New Zealand	120.3	125.3	4%
Chile	2,442.6	2,740.8	12%
Argentina	3,115.2	3,263.8	5%
Spain	1,815.4	1,947.5	7%
Portugal	1,050.4	1,038.7	-1%
Germany	104.8	109.5	4%
South Africa	267.8	229.0	-14%
All Others	763.3	801.0	5%
Totals	24,763.4	25,683.1	4%

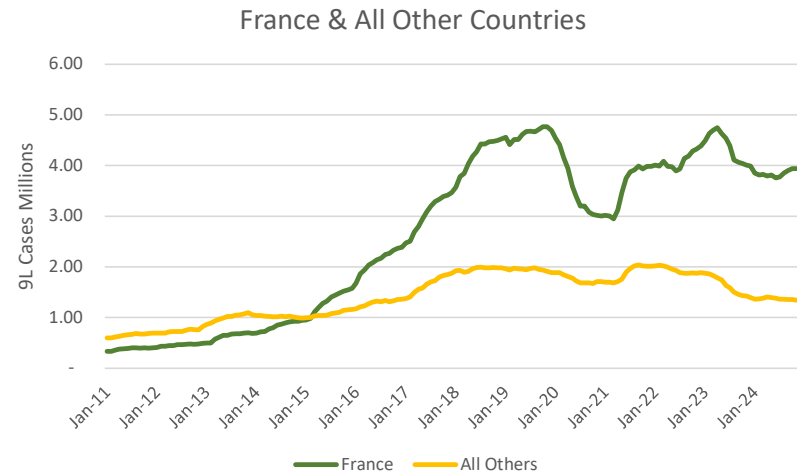
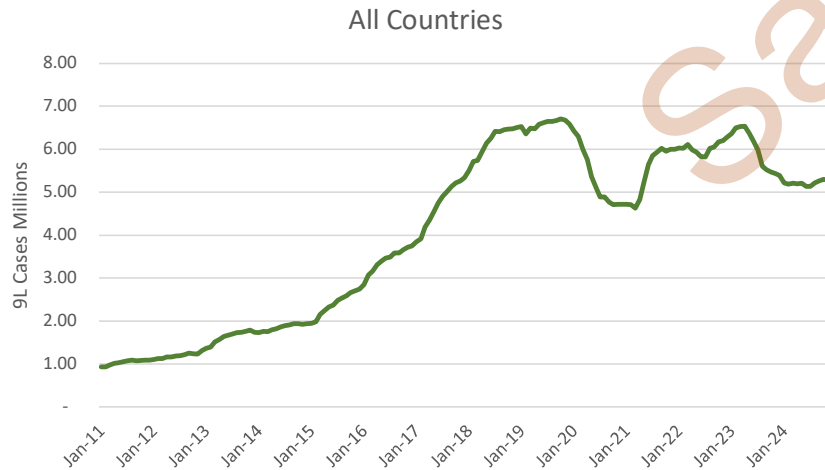
	White Wine		
	LYTD	YTD	% Chng
	12,392.0	12,297.2	-1%
	3,916.5	4,263.1	9%
	3,480.0	3,580.5	3%
	7,006.3	5,860.3	-16%
	1,047.5	1,183.5	13%
	286.1	270.8	-5%
	1,009.1	1,132.1	12%
	785.4	830.7	6%
	1,340.0	1,164.4	-13%
	405.1	350.0	-14%
	920.3	946.4	3%
Totals	32,588.2	31,879.0	-2%

	All Other Wines		
	LYTD	YTD	% Chng
	520.4	515.5	-1%
	3,853.0	3,804.2	-1%
	61.5	37.3	-39%
	50.1	36.2	-28%
	120.2	106.4	-11%
	49.5	43.2	-13%
	185.5	148.5	-20%
	104.3	131.7	26%
	91.5	83.2	-9%
	24.9	26.3	5%
	30.8	22.6	-27%
Totals	5,183.7	5,083.1	-2%

Customs data identifies Red Wines, White Wines, Tokay, Ice Wine and Others.

All Other Wines above includes Tokay, Ice Wine and Others. This is predominately Other which can be assumed to give trends for Rose'

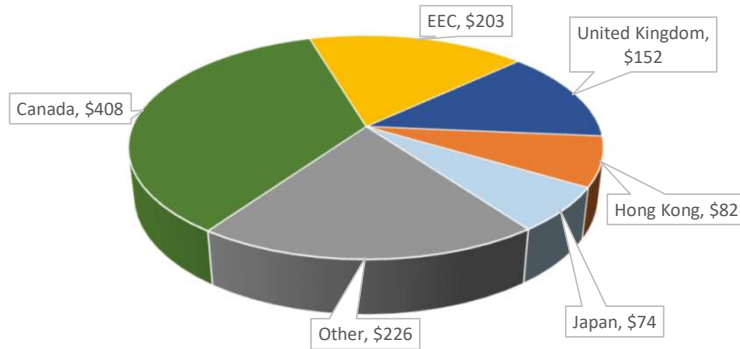
Rolling Twelve Month Imports of All Other Wines (Excludes Red and White) Bottled Table Wines (Less than or equal to 14% ABV)



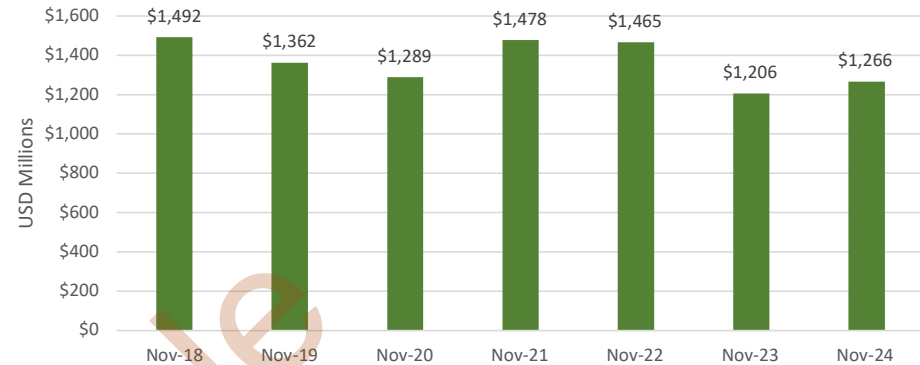
US Wine Export Trends

YTD Value of US Wine Exports

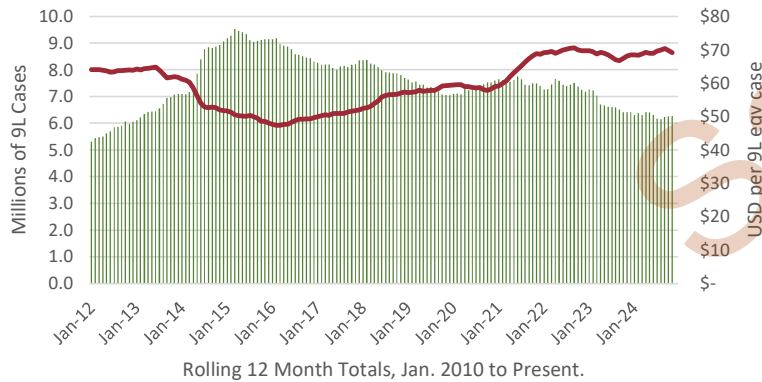
Export Value in USD Millions



Last 12 Months Value US Exports

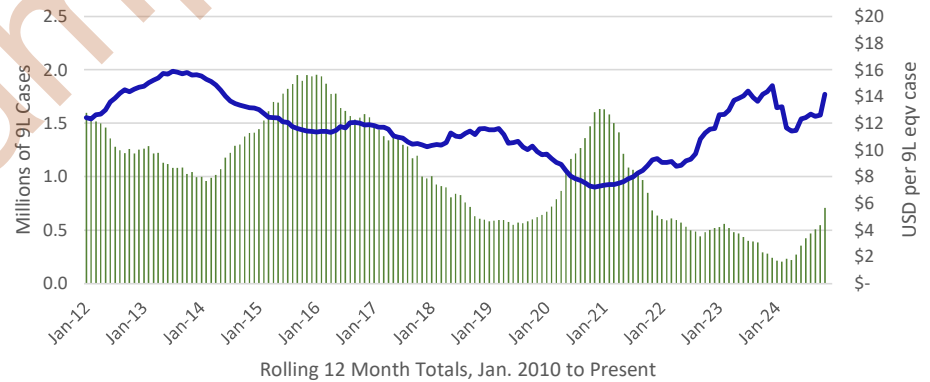


US Bottled Exports to Canada



Source: U. S. Department of Commerce.

US Bulk Exports to Canada

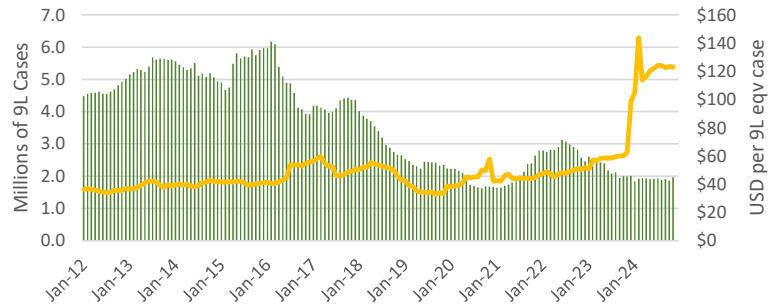


Bar Chart is Millions of 9L cases, Line Chart is USD per 9L



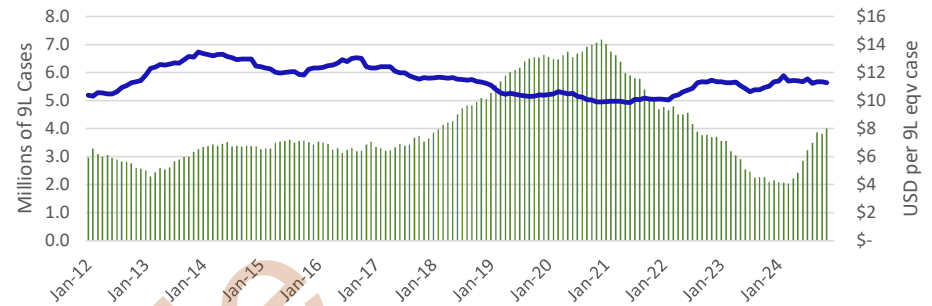
US Wine Export Trends

**US Bottled Exports to EEC
excludes UK**



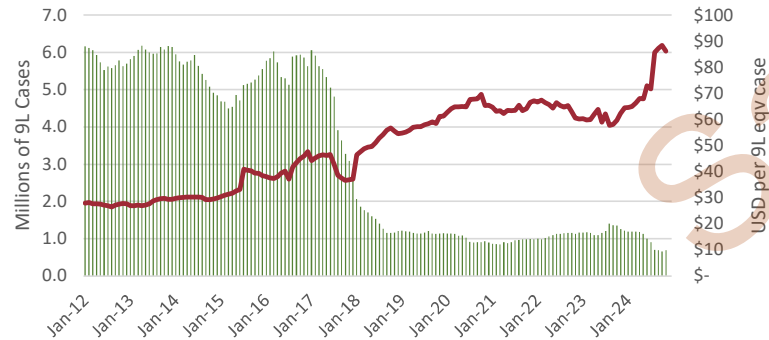
Rolling 12 Month Totals, Jan. 2010 to Present.

**US Bulk Exports to EEC
excludes UK**



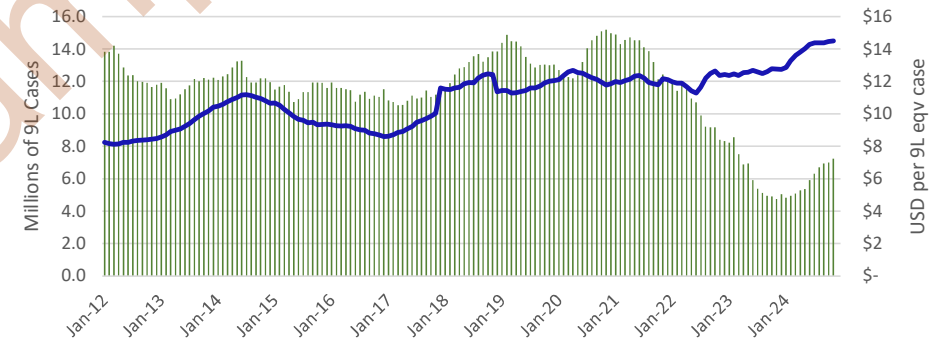
Rolling 12 Month Totals, Jan. 2010 to Present.

US Bottled Exports to UK



Rolling 12 Month Totals, Jan. 2010 to Present.

US Bulk Exports to UK



Rolling 12 Month Totals, Jan. 2010 to Present.

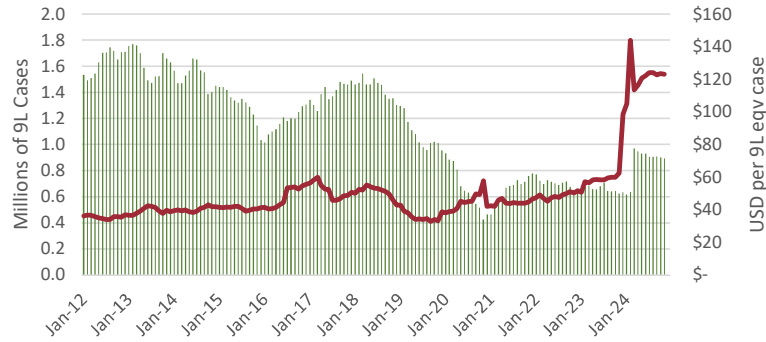
Source: U. S. Department of Commerce.

Bar Chart is Millions of 9L cases, Line Chart is USD per 9L



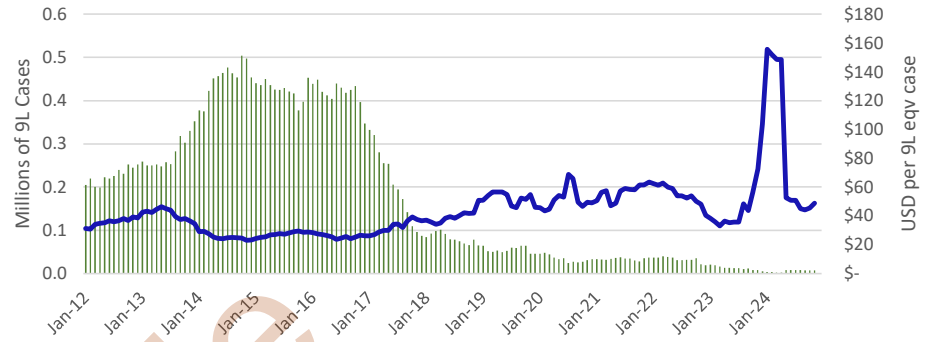
US Wine Export Trends

US Bottled Exports to China



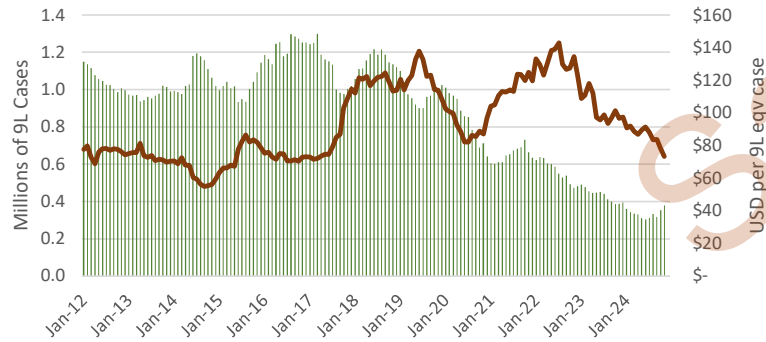
Rolling 12 Month Totals, Jan. 2010 to Present.

US Bulk Exports to China



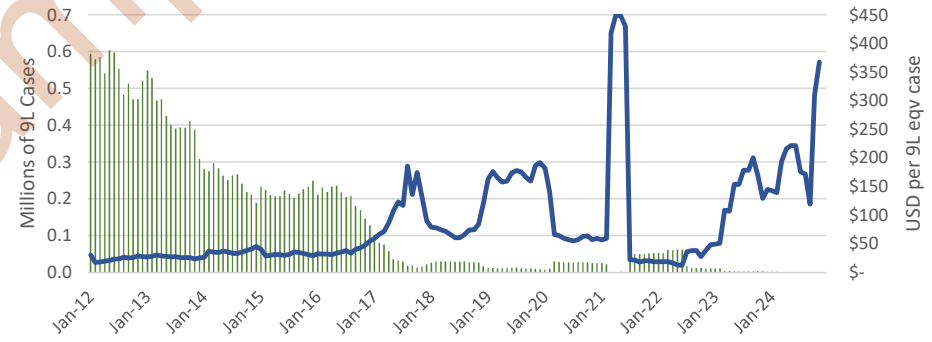
Rolling 12 Month Totals, Jan. 2010 to Present.

US Bottled Exports to Hong Kong



Rolling 12 Month Totals, Jan. 2010 to Present.

US Bulk Exports to Hong Kong



Rolling 12 Month Totals, Jan. 2010 to Present.

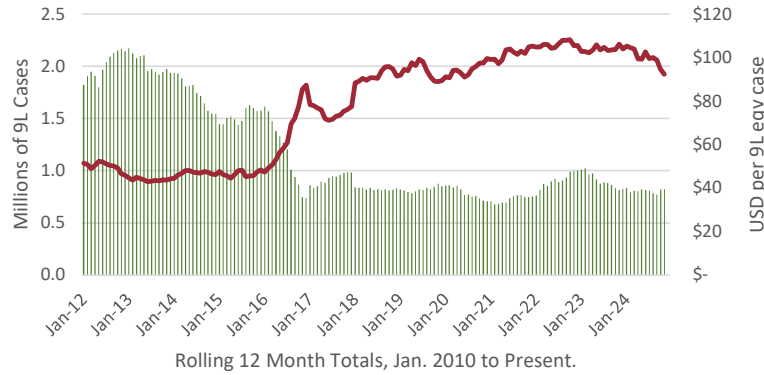
Source: U. S. Department of Commerce.

Bar Chart is Millions of 9L cases, Line Chart is USD per 9L

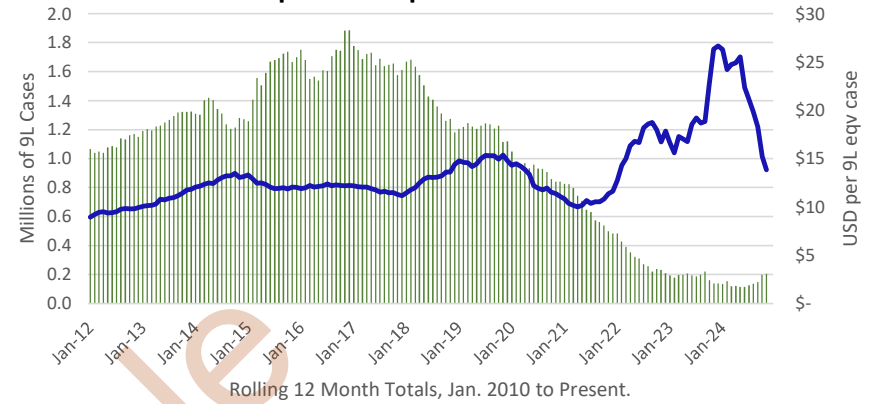


US Wine Export Trends

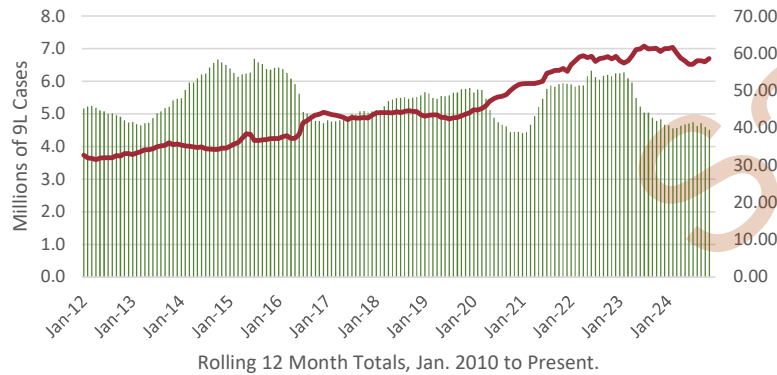
US Bottled Exports to Japan



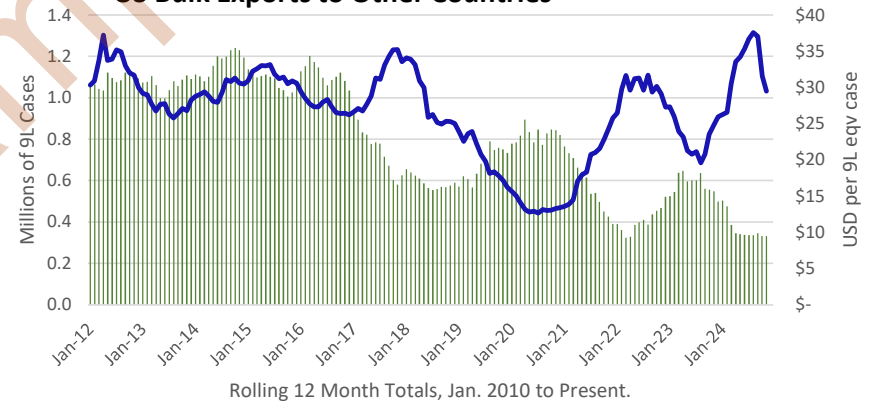
US Bulk Exports to Japan



US Bottled Exports to Other Countries



US Bulk Exports to Other Countries

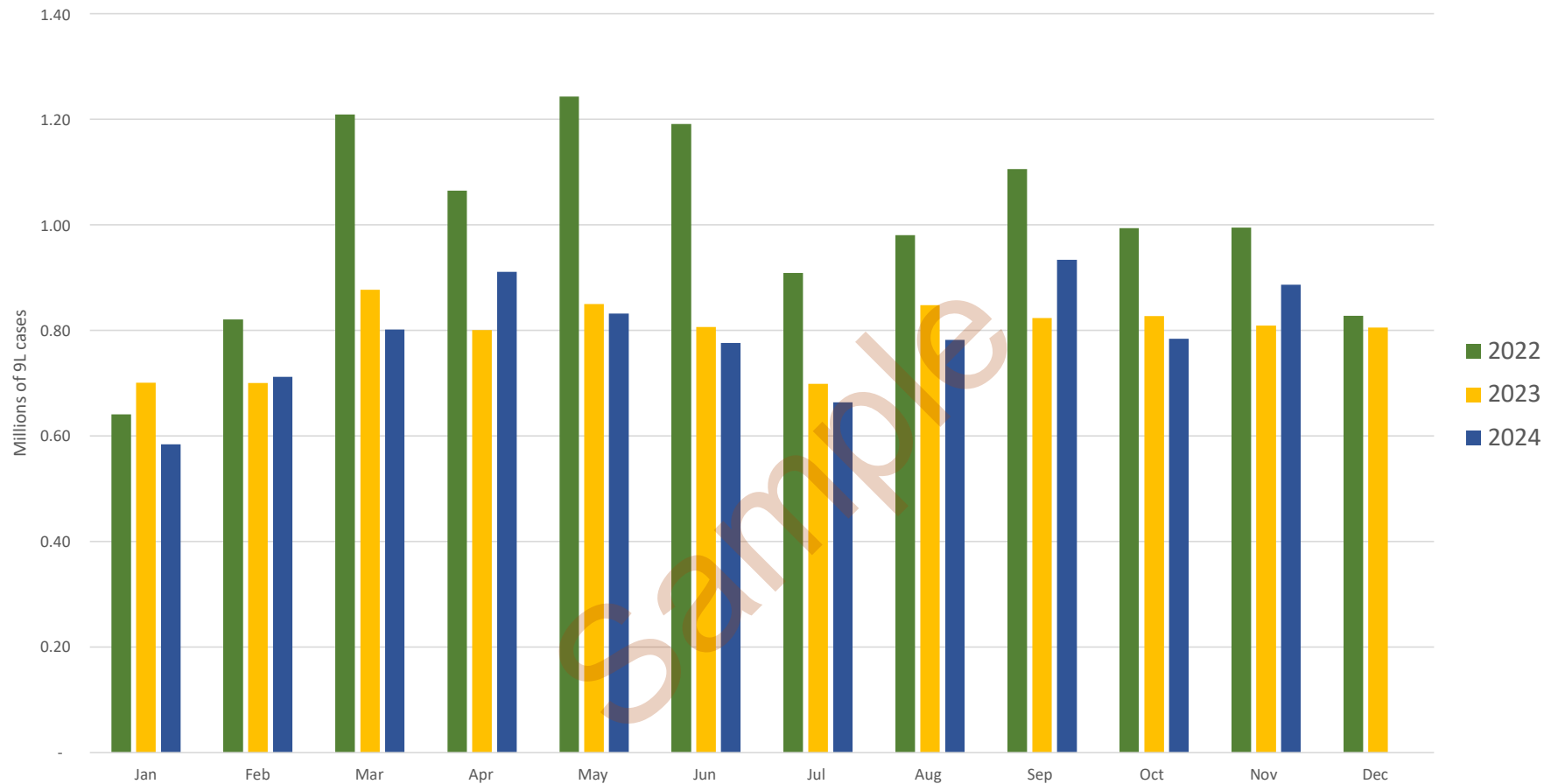


Source: U. S. Department of Commerce.

Bar Chart is Millions of 9L cases, Line Chart is USD per 9L



US Bottled Table Wine Exports by Month



Source: U. S. Department of Commerce.



US Wine Exports Year to Date - (Bottled Detail)

Summary by Wine Category

	9L Cases LYTD	9L Cases YTD	Case Change	% Change	Value LYTD	Value YTD	Value Change	% Change	USD per Case LYTD	USD per Case YTD
Bottled Table Wines	8,740,310	8,666,259	(74,052)	-1%	582,122,731	599,920,157	17,797,426	3%	66.60	69.22
Bottled Dessert Wine	3,126,715	3,105,139	(21,576)	-1%	300,317,657	297,166,211	(3,151,446)	-1%	96.05	95.70
Sparkling Wine	915,832	359,911	(555,920)	-61%	69,778,066	35,096,527	(34,681,539)	-50%	76.19	97.51
Vermouth	194,301	156,069	(38,231)	-20%	16,134,970	10,157,219	(5,977,751)	-37%	83.04	65.08
Sangria / Coolers	1,597,041	1,814,043	217,002	14%	33,847,125	36,847,384	3,000,259	9%	21.19	20.31
Cider	334,784	170,925	(163,859)	-49%	5,507,361	3,573,150	(1,934,211)	-35%	16.45	20.90
Sub Total Bottled	14,908,982	14,272,347	(636,635)	-4%	1,007,707,910	982,760,648	(24,947,262)	-2%	67.59	68.86
Bulk Still Wines	6,894,294	11,217,941	4,323,647	63%	89,079,462	153,095,681	64,016,219	72%	12.92	13.65
Bulk Dessert Wines	276,611	361,255	84,644	31%	8,718,238	8,172,486	(545,752)	-6%	31.52	22.62
Sub Total Bulk	7,170,905	11,579,196	4,408,291	61%	97,797,700	161,268,167	63,470,467	65%	13.64	13.93
Total Exports	22,079,887	25,851,543	3,771,656	17%	1,105,505,610	1,144,028,815	38,523,205	3%	50.07	44.25

Summary of Bottled Exports by Country YTD (Excludes bulk wines and grape musts)

Description	9L Cases LYTD	9L Cases YTD	Case Change	% Change	Value LYTD	Value YTD	Value Change	% Change	USD per Case LYTD	USD per Case YTD
Canada	5,940,389	5,783,344	(157,045)	-3%	404,200,788	398,111,785	(6,089,003)	-2%	68.04	68.84
China	547,178	805,216	258,037	47%	34,372,521	81,591,208	47,218,687	137%	62.82	101.33
Japan	755,218	754,642	(575)	0%	80,515,753	70,945,458	(9,570,295)	-12%	106.61	94.01
United Kingdom	1,175,231	646,152	(529,079)	-45%	73,603,236	54,483,672	(19,119,564)	-26%	62.63	84.32
Korea, South	658,138	599,727	(58,411)	-9%	59,967,845	47,095,189	(12,872,656)	-21%	91.12	78.53
Netherlands	247,755	515,539	267,784	108%	21,354,594	26,572,293	5,217,699	24%	86.19	51.54
Dominican Republic	721,436	783,043	61,607	9%	22,880,605	25,898,316	3,017,711	13%	31.72	33.07
Hong Kong	341,212	326,034	(15,178)	-4%	34,717,945	24,109,081	(10,608,864)	-31%	101.75	73.95
Denmark	445,769	311,991	(133,778)	-30%	25,480,730	22,245,902	(3,234,828)	-13%	57.16	71.30
Mexico	576,574	422,858	(153,716)	-27%	22,773,390	21,154,478	(1,618,912)	-7%	39.50	50.03
France	336,266	275,150	(61,116)	-18%	18,150,627	18,767,224	616,597	3%	53.98	68.21
Sweden	244,591	251,804	7,213	3%	13,490,811	14,840,153	1,349,342	10%	55.16	58.94
Singapore	190,339	152,555	(37,784)	-20%	15,606,265	12,632,825	(2,973,440)	-19%	81.99	82.81
Norway	113,181	141,448	28,267	25%	10,955,797	12,441,322	1,485,525	14%	96.80	87.96
Philippines	237,300	278,884	41,583	18%	9,505,580	9,445,403	(60,177)	-1%	40.06	33.87
Taiwan	157,924	123,236	(34,688)	-22%	14,036,920	9,067,355	(4,969,565)	-35%	88.88	73.58
Switzerland	96,494	121,775	25,280	26%	7,931,304	7,763,213	(168,091)	-2%	82.19	63.75

Source: U. S. Department of Commerce.



Summary of Bottled Exports by Country YTD - Continued (Excludes bulk wines and grape musts)

Description	9L Cases LYTD	9L Cases YTD	Case Change	% Change	Value LYTD	Value YTD	Value Change	% Change	USD per Case LYTD	USD per Case YTD
Belgium	111,417	100,086	(11,332)	-10%	11,434,140	7,736,057	(3,698,083)	-32%	102.62	77.29
Australia	103,662	86,461	(17,201)	-17%	7,414,247	7,602,580	188,333	3%	71.52	87.93
Nigeria	85,936	162,897	76,960	90%	4,030,452	7,418,044	3,387,592	84%	46.90	45.54
Germany	232,738	115,973	(116,765)	-50%	13,787,745	7,362,133	(6,425,612)	-47%	59.24	63.48
Bahamas	118,509	135,320	16,811	14%	7,613,236	6,698,675	(914,561)	-12%	64.24	49.50
United Arab Emirates	56,278	60,195	3,917	7%	6,379,021	6,126,009	(253,012)	-4%	113.35	101.77
Thailand	90,673	69,141	(21,532)	-24%	7,244,935	5,651,938	(1,592,997)	-22%	79.90	81.75
Cayman Islands	81,640	63,114	(18,526)	-23%	5,864,133	4,566,298	(1,297,835)	-22%	71.83	72.35
Panama	70,291	59,151	(11,140)	-16%	4,246,945	4,225,317	(21,628)	-1%	60.42	71.43
Spain	41,493	60,839	19,347	47%	3,403,531	4,091,801	688,270	20%	82.03	67.26
Bermuda	45,684	38,980	(6,704)	-15%	4,372,271	3,508,132	(864,139)	-20%	95.71	90.00
Aruba	70,570	64,233	(6,338)	-9%	4,358,687	3,496,509	(862,178)	-20%	61.76	54.43
Vietnam	20,737	39,218	18,481	89%	1,933,448	3,496,315	1,562,867	81%	93.24	89.15
Italy	45,993	49,945	3,952	9%	2,679,585	3,282,306	602,721	22%	58.26	65.72
Jamaica	93,583	59,800	(33,783)	-36%	5,477,027	2,827,041	(2,649,986)	-48%	58.53	47.27
Guatemala	44,086	49,237	5,151	12%	2,110,744	2,719,673	608,929	29%	47.88	55.24
New Zealand	24,799	26,816	2,017	8%	1,413,825	2,202,894	789,069	56%	57.01	82.15
Turks and Caicos Islands	27,271	25,725	(1,546)	-6%	2,151,012	1,981,567	(169,445)	-8%	78.87	77.03
Malaysia	16,599	9,962	(6,637)	-40%	1,230,061	1,942,634	712,573	58%	74.10	195.00
British Virgin Islands	14,765	15,918	1,153	8%	855,890	1,904,739	1,048,849	123%	57.97	119.66
Brazil	36,753	31,019	(5,734)	-16%	2,116,445	1,895,584	(220,861)	-10%	57.59	61.11
Costa Rica	23,551	27,277	3,726	16%	2,005,678	1,833,060	(172,618)	-9%	85.16	67.20
Sint Maarten	21,555	35,940	14,385	67%	1,151,661	1,799,675	648,014	56%	53.43	50.07
Israel	29,968	37,001	7,033	23%	1,622,302	1,570,141	(52,161)	-3%	54.13	42.44
Colombia	28,313	35,882	7,569	27%	1,059,560	1,535,705	476,145	45%	37.42	42.80
Latvia	55,965	33,356	(22,609)	-40%	2,730,478	1,498,341	(1,232,137)	-45%	48.79	44.92
Barbados	30,236	28,473	(1,763)	-6%	1,775,057	1,421,244	(353,813)	-20%	58.71	49.92
Honduras	14,014	19,136	5,122	37%	1,223,111	1,408,960	185,849	15%	87.28	73.63
Oman	25,390	47,956	22,566	89%	887,184	1,357,014	469,830	53%	34.94	28.30
Finland	14,400	20,962	6,561	46%	967,763	1,326,573	358,810	37%	67.20	63.29
Curacao	33,265	31,754	(1,511)	-5%	1,428,800	1,319,503	(109,297)	-8%	42.95	41.55
Indonesia	41,695	13,420	(28,275)	-68%	2,843,092	1,115,242	(1,727,850)	-61%	68.19	83.10
St Lucia	19,774	25,412	5,637	29%	700,406	1,003,131	302,725	43%	35.42	39.48
South Africa	13,263	15,679	2,416	18%	418,362	996,327	577,965	138%	31.54	63.54
Qatar	6,988	12,126	5,137	74%	448,623	967,082	518,459	116%	64.19	79.76

Source: U. S. Department of Commerce.



Summary of Bottled Exports by Country YTD - Continued (Excludes bulk wines and grape musts)

Description	9L Cases LYTD	9L Cases YTD	Case Change	% Change	Value LYTD	Value YTD	Value Change	% Change	USD per Case LYTD	USD per Case YTD
Trinidad and Tobago	18,885	18,157	(728)	-4%	1,018,667	895,909	(122,758)	-12%	53.94	49.34
Poland	10,190	11,312	1,123	11%	612,309	891,825	279,516	46%	60.09	78.84
Cambodia	23,324	11,476	(11,848)	-51%	1,430,910	867,052	(563,858)	-39%	61.35	75.55
Belize	10,812	14,246	3,434	32%	495,599	737,605	242,006	49%	45.84	51.78
Portugal	4,566	11,204	6,638	145%	131,691	699,597	567,906	++	28.84	62.44
Greece	11,498	8,742	(2,756)	-24%	947,865	609,254	(338,611)	-36%	82.43	69.69
Czech Republic	4,373	2,925	(1,448)	-33%	626,738	608,671	(18,067)	-3%	143.32	208.07
Suriname	12,834	12,914	80	1%	434,842	591,253	156,411	36%	33.88	45.78
El Salvador	14,319	7,837	(6,483)	-45%	839,149	547,373	(291,776)	-35%	58.60	69.85
Paraguay	2,569	7,280	4,710	183%	398,367	464,603	66,236	17%	155.04	63.82
Ireland	7,661	3,572	(4,089)	-53%	347,568	449,401	101,833	29%	45.37	125.82
Antigua and Barbuda	12,498	12,412	(86)	-1%	438,827	444,189	5,362	1%	35.11	35.79
Austria	3,493	2,761	(732)	-21%	521,637	417,763	(103,874)	-20%	149.35	151.33
Peru	13,966	7,647	(6,319)	-45%	730,223	403,715	(326,508)	-45%	52.29	52.80
St Kitts and Nevis	9,740	7,836	(1,903)	-20%	497,255	393,908	(103,347)	-21%	51.05	50.27
Ghana	15,267	10,503	(4,763)	-31%	668,583	387,008	(281,575)	-42%	43.79	36.85
Iceland	13,707	6,316	(7,392)	-54%	619,439	380,201	(239,238)	-39%	45.19	60.20
Guadeloupe	5,252	5,190	(63)	-1%	576,701	369,891	(206,810)	-36%	109.80	71.27
Grenada	8,184	8,754	571	7%	341,490	309,743	(31,747)	-9%	41.73	35.38
Macau	13,533	8,488	(5,045)	-37%	421,284	306,086	(115,198)	-27%	31.13	36.06
Lithuania	3,108	5,424	2,316	75%	204,790	259,374	54,584	27%	65.90	47.82
St Vincent and the Grenadines	4,314	5,966	1,651	38%	228,232	257,730	29,498	13%	52.90	43.20
Anguilla	2,734	4,782	2,048	75%	110,407	236,213	125,806	114%	40.38	49.39
Chile	4,215	8,326	4,111	98%	153,315	225,456	72,141	47%	36.37	27.08
Togo	27	2,763	2,736	++	3,000	223,780	220,780	++	112.50	81.00
India	10,058	3,826	(6,232)	-62%	494,655	215,236	(279,419)	-56%	49.18	56.26
Uruguay	6,532	1,123	(5,409)	-83%	771,852	207,729	(564,123)	-73%	118.17	185.03
Romania	2,135	3,007	872	41%	262,204	199,514	(62,690)	-24%	122.83	66.36
Laos	8,380	3,708	(4,672)	-56%	239,250	192,927	(46,323)	-19%	28.55	52.03
Argentina	3,307	3,965	658	20%	125,581	188,784	63,203	50%	37.98	47.61
Nicaragua	4,169	3,542	(627)	-15%	268,064	174,240	(93,824)	-35%	64.29	49.19
Mongolia	999	2,595	1,596	160%	56,824	152,736	95,912	169%	56.91	58.87
Venezuela	791	5,514	4,723	++	67,451	128,971	61,520	91%	85.23	23.39
Haiti	7,087	3,390	(3,697)	-52%	230,909	128,385	(102,524)	-44%	32.58	37.87
Fiji	959	509	(450)	-47%	65,010	127,632	62,622	96%	67.81	250.97

Source: U. S. Department of Commerce.



Summary of Bottled Exports by Country YTD - Continued (Excludes bulk wines and grape musts)

Description	9L Cases LYTD	9L Cases YTD	Case Change	% Change	Value LYTD	Value YTD	Value Change	% Change	USD per Case LYTD	USD per Case YTD
Slovakia	-	435	435	++	-	125,193	125,193	++	++	287.80
Kenya	3,962	2,283	(1,679)	-42%	215,364	113,781	(101,583)	-47%	54.36	49.84
Maldives	989	1,332	343	35%	83,460	112,386	28,926	35%	84.35	84.37
Dominica	3,964	3,027	(936)	-24%	135,669	104,059	(31,610)	-23%	34.23	34.37
Cote d'Ivoire	71	922	851	++	8,705	91,239	82,534	++	122.61	98.93
Liechtenstein	392	144	(248)	-63%	125,524	88,363	(37,161)	-30%	320.49	615.06
Micronesia	1,880	1,689	(191)	-10%	97,634	87,521	(10,113)	-10%	51.92	51.80
French Polynesia	1,654	681	(973)	-59%	152,054	75,009	(77,045)	-51%	91.94	110.15
Ecuador	5,562	1,101	(4,461)	-80%	267,559	70,480	(197,079)	-74%	48.11	64.01
Luxembourg	183	800	617	++	48,527	69,891	21,364	44%	264.85	87.38
Guyana	2,170	1,638	(532)	-25%	65,428	65,478	50	0%	30.15	39.98
Tonga	-	3,236	3,236	++	-	64,599	64,599	++	++	19.97
Marshall Islands	789	1,302	513	65%	23,236	64,152	40,916	176%	29.43	49.27
Jordan	402	1,672	1,270	++	115,201	60,450	(54,751)	-48%	286.73	36.15
Croatia	1,889	601	(1,288)	-68%	258,052	59,617	(198,435)	-77%	136.62	99.23
Cyprus	1,016	1,171	155	15%	66,874	53,690	(13,184)	-20%	65.82	45.86
Turkey	1,266	1,388	122	10%	73,232	51,244	(21,988)	-30%	57.84	36.91
Sri Lanka	2,367	1,412	(955)	-40%	112,070	50,376	(61,694)	-55%	47.34	35.68
Lebanon	362	414	52	14%	3,750	49,380	45,630	++	10.35	119.28
Ukraine	1,325	253	(1,073)	-81%	102,378	44,221	(58,157)	-57%	77.25	175.09
Egypt	-	350	350	++	-	43,880	43,880	++	++	125.37
Armenia	896	238	(657)	-73%	99,306	43,738	(55,568)	-56%	110.87	183.52
Serbia	493	477	(16)	-3%	40,478	43,725	3,247	8%	82.09	91.71
Pakistan	-	560	560	++	-	43,680	43,680	++	++	78.00
Estonia	1,735	295	(1,440)	-83%	112,094	39,431	(72,663)	-65%	64.59	133.46
Cuba	4,059	467	(3,592)	-88%	92,222	35,002	(57,220)	-62%	22.72	74.95
Sierra Leone	266	1,110	844	++	5,401	34,818	29,417	++	20.34	31.38
Malta	1,186	44	(1,143)	-96%	80,882	27,400	(53,482)	-66%	68.18	629.08
Seychelles	28	155	127	++	3,690	22,533	18,843	++	131.79	145.48
Palau	-	412	412	++	-	21,873	21,873	++	++	53.15
Georgia	2,125	443	(1,682)	-79%	97,379	20,819	(76,560)	-79%	45.82	46.95
Bahrain	3,251	477	(2,774)	-85%	174,237	20,723	(153,514)	-88%	53.60	43.46
Hungary	132	85	(47)	-36%	16,516	19,366	2,850	17%	124.70	227.54
Samoa	776	696	(80)	-10%	21,997	19,281	(2,716)	-12%	28.35	27.70
Bulgaria	558	128	(430)	-77%	95,385	15,580	(79,805)	-84%	170.97	121.72

Source: U. S. Department of Commerce.



Summary of Bottled Exports by Country YTD - Continued (Excludes bulk wines and grape musts)

Description	9L Cases LYTD	9L Cases YTD	Case Change	% Change	Value LYTD	Value YTD	Value Change	% Change	USD per Case LYTD	USD per Case YTD
Kazakhstan	-	13	13	++	-	14,400	14,400	++	++	1,146.90
Saudi Arabia	-	685	685	++	-	10,969	10,969	++	++	16.02
Cameroon	2,451	5	(2,446)	-100%	82,640	10,000	(72,640)	-88%	33.72	2,195.12
Eswatini	-	103	103	++	-	9,375	9,375	++	++	91.31
Mali	-	90	90	++	-	4,320	4,320	++	++	48.00
Afghanistan	-	90	90	++	-	4,050	4,050	++	++	45.00
Monaco	78	109	31	40%	11,170	3,915	(7,255)	-65%	143.41	35.99
Tunisia	535	8	(527)	-98%	33,474	3,766	(29,708)	-89%	62.56	451.92
Mayotte	80	-	(80)	-100%	18,840	-	(18,840)	-100%	235.50	++
Benin	529	-	(529)	-100%	33,114	-	(33,114)	-100%	62.54	++
Gibraltar	308	-	(308)	-100%	13,860	-	(13,860)	-100%	45.00	++
Congo (Kinshasa)	406	-	(406)	-100%	18,270	-	(18,270)	-100%	45.00	++
Mauritius	233	-	(233)	-100%	3,258	-	(3,258)	-100%	13.96	++
Ethiopia	3,305	-	(3,305)	-100%	206,439	-	(206,439)	-100%	62.46	++
Burkina Faso	22	-	(22)	-100%	4,800	-	(4,800)	-100%	218.18	++
Liberia	906	-	(906)	-100%	56,662	-	(56,662)	-100%	62.55	++
Gambia	25	-	(25)	-100%	4,000	-	(4,000)	-100%	157.21	++
Tanzania	108	-	(108)	-100%	2,800	-	(2,800)	-100%	25.93	++
Bangladesh	1,909	-	(1,909)	-100%	119,423	-	(119,423)	-100%	62.55	++
Grand Total	14,908,982	14,272,347	(636,635)	-4%	1,007,707,910	982,760,648	(24,947,262)	-2%	67.59	68.86

Source: U. S. Department of Commerce.



US Wine Exports Year to Date - (Bulk Detail)

Summary by Wine Category

Description	9L Cases LYTD	9L Cases YTD	Case Change	% Change	Value LYTD	Value YTD	Value Change	% Change	USD per Case LYTD	USD per Case YTD
Bottled Table Wines	8,740,310	8,666,259	(74,052)	-1%	582,122,731	599,920,157	17,797,426	3%	66.60	69.22
Bottled Dessert Wine	3,126,715	3,105,139	(21,576)	-1%	300,317,657	297,166,211	(3,151,446)	-1%	96.05	95.70
Sparkling Wine	915,832	359,911	(555,920)	-61%	69,778,066	35,096,527	(34,681,539)	-50%	76.19	97.51
Vermouth	194,301	156,069	(38,231)	-20%	16,134,970	10,157,219	(5,977,751)	-37%	83.04	65.08
Sangria / Coolers	1,597,041	1,814,043	217,002	14%	33,847,125	36,847,384	3,000,259	9%	21.19	20.31
Cider	334,784	170,925	(163,859)	-49%	5,507,361	3,573,150	(1,934,211)	-35%	16.45	20.90
Sub Total Bottled	14,908,982	14,272,347	(636,635)	-4%	1,007,707,910	982,760,648	(24,947,262)	-2%	67.59	68.86
Bulk Still Wines	6,894,294	11,217,941	4,323,647	63%	89,079,462	153,095,681	64,016,219	72%	12.92	13.65
Bulk Dessert Wines	276,611	361,255	84,644	31%	8,718,238	8,172,486	(545,752)	-6%	31.52	22.62
Sub Total Bulk	7,170,905	11,579,196	4,408,291	61%	97,797,700	161,268,167	63,470,467	65%	13.64	13.93
Total Exports	22,079,887	25,851,543	3,771,656	17%	1,105,505,610	1,144,028,815	38,523,205	3%	50.07	44.25

Summary of Bulk Wine Exports by Country YTD (Excludes bulk wines and grape musts)

Description	9L Cases LYTD	9L Cases YTD	Case Change	% Change	Value LYTD	Value YTD	Value Change	% Change	USD per Case LYTD	USD per Case YTD
United Kingdom	4,431,590	6,626,973	2,195,383	50%	56,494,344	97,229,350	40,735,006	72%	12.75	14.67
Germany	367,302	1,236,623	869,322	++	3,661,945	12,620,665	8,958,720	++	9.97	10.21
Canada	238,631	704,652	466,021	195%	3,536,897	9,993,197	6,456,300	183%	14.82	14.18
Denmark	311,134	776,463	465,330	150%	5,095,715	9,426,568	4,330,853	85%	16.38	12.14
France	344,104	727,279	383,175	111%	4,078,714	8,590,495	4,511,781	111%	11.85	11.81
Belgium	458,222	453,444	(4,778)	-1%	3,546,182	4,492,820	946,638	27%	7.74	9.91
Netherlands	219,634	266,639	47,005	21%	2,120,614	2,692,466	571,852	27%	9.66	10.10
Japan	131,926	196,667	64,741	49%	3,509,288	2,612,005	(897,283)	-26%	26.60	13.28
Sweden	90,601	139,678	49,077	54%	1,294,050	2,476,679	1,182,629	91%	14.28	17.73
Mexico	90,475	60,507	(29,968)	-33%	1,842,905	1,768,994	(73,911)	-4%	20.37	29.24
Finland	55,111	93,256	38,144	69%	428,000	946,392	518,392	121%	7.77	10.15
Australia	54,317	101,214	46,897	86%	693,179	894,220	201,041	29%	12.76	8.83
Korea, South	8,142	13,061	4,919	60%	2,415,189	664,979	(1,750,210)	-72%	296.63	50.91
Iceland	-	22,984	22,984	++	-	559,742	559,742	++	++	24.35
Cayman Islands	2,097	4,218	2,121	101%	464,177	527,845	63,668	14%	221.40	125.14
Belize	10,598	10,063	(535)	-5%	477,641	448,325	(29,316)	-6%	45.07	44.55
British Virgin Islands	9,949	2,577	(7,373)	-74%	196,426	393,220	196,794	100%	19.74	152.61
China	5,187	7,335	2,148	41%	537,038	359,351	(177,687)	-33%	103.54	48.99

Source: U. S. Department of Commerce.



Summary of Bulk Wine Exports by Country YTD- Continued

Description	9L Cases LYTD	9L Cases YTD	Case Change	% Change	Value LYTD	Value YTD	Value Change	% Change	USD per Case LYTD	USD per Case YTD
Singapore	465	2,810	2,345	++	131,005	322,340	191,335	146%	281.80	114.73
Turks and Caicos Islands	8,667	10,359	1,691	20%	320,955	312,678	(8,277)	-3%	37.03	30.18
Dominican Republic	1,145	7,096	5,951	++	54,127	279,723	225,596	++	47.28	39.42
Aruba	4,162	6,094	1,932	46%	245,935	254,637	8,702	4%	59.08	41.78
Poland	23,111	20,000	(3,111)	-13%	192,000	216,000	24,000	13%	8.31	10.80
Vietnam	-	1,124	1,124	++	-	182,722	182,722	++	++	162.56
Thailand	5,738	1,167	(4,571)	-80%	874,142	182,088	(692,054)	-79%	152.35	156.03
Barbados	9,806	5,361	(4,445)	-45%	276,642	171,179	(105,463)	-38%	28.21	31.93
Norway	196,049	16,000	(180,049)	-92%	1,616,000	164,000	(1,452,000)	-90%	8.24	10.25
Curacao	9,438	6,927	(2,511)	-27%	269,832	163,431	(106,401)	-39%	28.59	23.59
Guatemala	234	1,509	1,275	++	19,680	162,951	143,271	++	84.02	107.95
Bermuda	2,990	1,544	(1,446)	-48%	147,065	146,942	(123)	0%	49.18	95.16
Italy	5,740	5,333	(407)	-7%	229,752	136,960	(92,792)	-40%	40.03	25.68
St Vincent and the Grenadines	601	4,639	4,038	++	15,725	132,617	116,892	++	26.18	28.59
Taiwan	12,607	408	(12,199)	-97%	241,272	123,493	(117,779)	-49%	19.14	302.76
Sint Maarten	860	859	(1)	0%	49,402	107,190	57,788	117%	57.41	124.74
Bahamas	7,555	801	(6,754)	-89%	481,947	103,667	(378,280)	-78%	63.79	129.35
El Salvador	-	2,012	2,012	++	-	101,523	101,523	++	++	50.45
Cambodia	-	1,060	1,060	++	-	101,240	101,240	++	++	95.51
Costa Rica	1,020	892	(128)	-13%	32,244	94,319	62,075	193%	31.60	105.70
Hong Kong	2,398	279	(2,119)	-88%	304,656	89,655	(215,001)	-71%	127.03	321.60
Spain	7,894	4,761	(3,133)	-40%	343,691	79,742	(263,949)	-77%	43.54	16.75
New Zealand	2,653	5,330	2,678	101%	66,000	71,542	5,542	8%	24.88	13.42
Switzerland	7,717	5,436	(2,281)	-30%	168,883	67,701	(101,182)	-60%	21.88	12.45
Venezuela	-	955	955	++	-	64,940	64,940	++	++	68.00
Nigeria	241	1,416	1,175	++	21,388	57,896	36,508	171%	88.79	40.90
Romania	12	4,444	4,432	++	9,360	48,000	38,640	++	780.00	10.80
St Lucia	10,340	1,543	(8,796)	-85%	301,380	45,050	(256,330)	-85%	29.15	29.19
Panama	265	788	523	198%	53,066	42,566	(10,500)	-20%	200.50	54.03
Latvia	115	1,200	1,085	++	34,083	42,000	7,917	23%	295.23	35.00
Paraguay	5	48	43	++	26,220	40,137	13,917	53%	4,916.25	830.42
Montenegro	813	1,270	457	56%	25,598	40,000	14,402	56%	31.50	31.50
Antigua and Barbuda	7,233	1,656	(5,577)	-77%	172,967	39,244	(133,723)	-77%	23.91	23.69
St Kitts and Nevis	1,442	1,607	165	11%	42,541	38,346	(4,195)	-10%	29.50	23.86

Source: U. S. Department of Commerce.



Summary of Bulk Wine Exports by Country YTD- Continued

Description	9L Cases LYTD	9L Cases YTD	Case Change	% Change	Value LYTD	Value YTD	Value Change	% Change	USD per Case LYTD	USD per Case YTD
Cuba	-	2,153	2,153	++	-	36,936	36,936	++	++	17.16
Lithuania	-	634	634	++	-	36,300	36,300	++	++	57.26
Jamaica	-	118	118	++	-	31,052	31,052	++	++	263.65
Suriname	233	766	533	++	9,182	30,870	21,688	++	39.33	40.29
Uruguay	247	50	(197)	-80%	58,723	27,298	(31,425)	-54%	237.74	548.40
Trinidad and Tobago	1,407	629	(778)	-55%	51,239	26,354	(24,885)	-49%	36.41	41.90
Grenada	3,999	817	(3,182)	-80%	109,246	25,738	(83,508)	-76%	27.32	31.50
Greece	74	1,996	1,923	++	41,990	20,663	(21,327)	-51%	569.14	10.35
Brazil	-	320	320	++	-	20,018	20,018	++	++	62.64
Benin	-	476	476	++	-	15,000	15,000	++	++	31.50
Dominica	-	470	470	++	-	14,850	14,850	++	++	31.62
Guyana	210	15	(195)	-93%	12,350	12,956	606	5%	58.78	851.12
Palau	-	182	182	++	-	10,820	10,820	++	++	59.38
South Africa	1,140	129	(1,011)	-89%	48,380	10,759	(37,621)	-78%	42.44	83.40
Cameroon	1	22	21	++	2,600	8,000	5,400	++	2,600.00	360.00
Ghana	-	20	20	++	-	4,200	4,200	++	++	208.84
Anguilla	171	28	(143)	-84%	8,694	4,125	(4,569)	-53%	50.71	146.16
Philippines	-	3	3	++	-	2,900	2,900	++	++	870.00
French Polynesia	-	0	0	++	-	2,850	2,850	++	++	12,825.00
Cyprus	-	4	4	++	-	2,646	2,646	++	++	744.19
Malta	5	-	(5)	-100%	7,500	-	(7,500)	-100%	1,500.00	++
Sri Lanka	5	-	(5)	-100%	2,623	-	(2,623)	-100%	491.81	++
Chile	87	-	(87)	-100%	27,163	-	(27,163)	-100%	310.63	++
Honduras	4	-	(4)	-100%	2,840	-	(2,840)	-100%	710.00	++
Colombia	2,020	-	(2,020)	-100%	64,971	-	(64,971)	-100%	32.16	++
Serbia	10	-	(10)	-100%	18,890	-	(18,890)	-100%	1,889.00	++
Nicaragua	134	-	(134)	-100%	41,479	-	(41,479)	-100%	309.80	++
Ireland	227	-	(227)	-100%	33,174	-	(33,174)	-100%	146.43	++
Israel	593	-	(593)	-100%	96,794	-	(96,794)	-100%	163.32	++
Grand Total	7,170,905	11,579,196	4,408,291	61%	97,797,700	161,268,167	63,470,467	65%	13.64	13.93

Source: U. S. Department of Commerce.



US Total Wine Exports Current Month - (Bottled & Bulk)

Summary by Wine Category for Month

Description	9L Cases Month LY (000)	9L Cases Month TY (000)	Case Change	% Change	Value Month LY (000)	Value Month TY (000)	Value Change	% Change	USD per Case LY	USD per Case TY
Bottled Table Wines	809	887	78	10%	53,031	54,684	1,653	3%	65.56	61.68
Bottled Dessert Wine	285	268	(17)	-6%	32,451	26,644	(5,806)	-18%	113.85	99.39
Sparkling Wine	27	42	15	56%	3,687	3,390	(297)	-8%	138.41	81.59
Vermouth	11	16	4	37%	943	1,059	116	12%	82.74	67.91
Sangria / Coolers	227	253	26	11%	4,421	4,849	428	10%	19.45	19.18
Cider	42	12	(31)	-72%	614	235	(379)	-62%	14.50	19.90
Bulk Still Wines	422	1,019	597	142%	5,818	14,267	8,448	145%	13.79	14.00
Bulk Dessert Wines	30	33	2	8%	1,246	925	(321)	-26%	41.08	28.29
Total Exports	1,854	2,528	674	36%	102,211	106,053	3,842	4%	55.13	41.95

Summary of Total Exports by Country for Current Month

Description	9L Cases Month LY (000)	9L Cases Month TY (000)	Case Change	% Change	Value Month LY (000)	Value Month TY (000)	Value Change	% Change	USD per Case LY	USD per Case TY
Canada	645	809	165	26%	48,371	47,511	(860)	-2%	75.03	58.71
United Kingdom	276	549	273	99%	6,663	11,901	5,238	79%	24.13	21.68
Japan	69	83	14	20%	7,137	5,621	(1,516)	-21%	102.78	67.58
Korea, South	70	61	(9)	-12%	5,752	3,899	(1,853)	-32%	82.18	63.63
Dominican Republic	177	145	(32)	-18%	3,190	3,864	675	21%	17.98	26.59
Netherlands	33	149	117	++	2,163	3,601	1,439	67%	66.02	24.10
Mexico	52	50	(2)	-4%	1,829	2,704	875	48%	35.18	54.20
Hong Kong	24	48	25	103%	2,439	2,469	30	1%	102.60	51.12
Denmark	49	127	79	162%	2,414	2,328	(86)	-4%	49.75	18.28
Sweden	28	42	13	46%	1,189	2,198	1,009	85%	41.88	52.97
China	40	34	(6)	-16%	3,192	1,995	(1,197)	-38%	80.29	59.47
Germany	53	108	55	103%	1,397	1,974	576	41%	26.39	18.34
Belgium	17	60	42	++	457	1,332	875	191%	26.15	22.27
Switzerland	5	12	7	145%	385	972	587	152%	76.23	78.49
Singapore	11	8	(2)	-23%	952	952	1	0%	90.09	117.19
Vietnam	4	10	6	153%	331	932	601	182%	85.85	95.43
Norway	10	12	2	16%	769	878	110	14%	75.10	74.22
United Arab Emirates	11	4	(7)	-68%	327	799	472	144%	30.02	227.05

Source: U. S. Department of Commerce.



Summary of Total Exports by Country for Current Month - Continued

Description	9L Cases Month LY (000)	9L Cases Month TY (000)	Case Change	% Change	Value Month LY (000)	Value Month TY (000)	Value Change	% Change	USD per Case LY	USD per Case TY
France	65	46	(20)	-30%	691	696	4	1%	10.56	15.15
Panama	2	7	5	++	72	601	529	++	29.22	80.74
Cayman Islands	11	6	(5)	-43%	829	591	(238)	-29%	73.80	92.43
Nigeria	37	13	(24)	-64%	1,688	564	(1,123)	-67%	45.34	41.91
Thailand	9	2	(7)	-74%	878	501	(377)	-43%	95.59	206.98
Turks and Caicos Islands	5	8	2	47%	432	491	59	14%	83.29	64.45
Taiwan	11	7	(4)	-39%	634	453	(181)	-29%	56.88	66.34
Portugal	-	6	6	++	-	379	379	++	++	62.55
Brazil	1	4	3	++	67	330	264	++	56.25	87.30
Jamaica	10	7	(3)	-29%	632	325	(307)	-49%	60.71	43.71
Sint Maarten	0	5	4	++	42	308	266	++	159.16	66.34
Latvia	1	8	7	++	57	290	233	++	53.50	38.22
Bahamas	13	5	(8)	-59%	849	259	(590)	-70%	64.67	48.63
Australia	12	8	(4)	-32%	841	256	(585)	-70%	72.93	32.79
Costa Rica	1	4	3	++	45	249	205	++	57.57	64.01
Bermuda	6	2	(4)	-67%	446	234	(212)	-47%	69.89	110.81
New Zealand	1	3	2	++	41	220	178	++	40.58	70.85
St Lucia	1	4	3	++	49	217	169	++	34.56	48.28
Aruba	11	4	(7)	-62%	500	216	(284)	-57%	43.95	49.96
Belize	1	4	2	184%	57	203	147	++	42.00	53.09
Philippines	11	6	(5)	-47%	502	190	(312)	-62%	47.01	33.38
Honduras	1	3	2	++	97	187	89	92%	131.91	59.10
Finland	7	8	1	11%	68	168	100	147%	9.56	21.33
Guatemala	1	5	3	++	69	167	98	142%	55.47	35.87
Curacao	4	5	1	22%	125	158	33	27%	31.89	33.09
British Virgin Islands	1	1	1	91%	59	120	61	103%	83.99	89.12
Colombia	2	2	0	12%	53	109	57	108%	32.50	60.29
Israel	0	3	2	++	9	103	95	++	91.87	41.13
Romania	-	2	2	++	-	102	102	++	++	52.65
Ireland	-	1	1	++	-	92	92	++	++	70.85
Spain	1	1	0	5%	93	91	(1)	-1%	67.19	62.95
Antigua and Barbuda	5	4	(1)	-16%	100	87	(13)	-13%	20.80	21.52

Source: U. S. Department of Commerce.



Summary of Total Exports by Country for Current Month - Continued

Description	9L Cases Month LY (000)	9L Cases Month TY (000)	Case Change	% Change	Value Month LY (000)	Value Month TY (000)	Value Change	% Change	USD per Case LY	USD per Case TY
Indonesia	0	1	0	104%	116	81	(36)	-31%	266.83	90.69
St Kitts and Nevis	2	1	(1)	-29%	41	78	37	89%	20.31	53.74
Barbados	6	1	(5)	-86%	307	69	(238)	-77%	49.94	77.82
Italy	3	2	(1)	-40%	103	68	(35)	-34%	40.64	44.98
Grenada	0	2	2	++	8	68	60	++	1,446.84	41.44
Oman	6	1	(4)	-76%	165	66	(98)	-60%	28.47	47.62
Trinidad and Tobago	0	1	1	++	56	55	(1)	-2%	150.83	38.18
Haiti	-	1	1	++	-	53	53	++	++	45.00
Poland	4	1	(3)	-81%	112	49	(63)	-56%	26.88	61.09
Austria	0	1	1	128%	9	46	38	++	22.47	52.17
Macau	1	1	(0)	-14%	49	40	(10)	-19%	38.28	36.00
Peru	0	1	0	192%	17	39	22	130%	88.37	69.52
Nicaragua	0	1	1	147%	26	39	13	51%	64.78	39.48
Dominica	-	1	1	++	-	38	38	++	++	35.09
El Salvador	0	1	1	++	24	33	9	37%	837.41	37.13
Malta	1	0	(1)	-93%	38	27	(10)	-27%	62.37	629.08
Czech Republic	2	0	(2)	-87%	278	26	(253)	-91%	159.80	113.85
Suriname	0	0	0	16%	30	24	(6)	-19%	123.71	86.59
French Polynesia	0	0	0	++	4	23	19	++	204.95	79.71
Chile	1	0	(1)	-84%	72	23	(49)	-68%	53.44	108.10
St Vincent and the Grenadines	-	1	1	++	-	22	22	++	++	35.96
Luxembourg	0	1	0	++	24	22	(2)	-10%	290.45	41.84
Serbia	0	0	0	++	19	19	(0)	-1%	1,889.00	43.23
Uruguay	1	0	(0)	-67%	71	17	(53)	-76%	127.80	96.04
Bulgaria	-	0	0	++	-	16	16	++	++	121.72
Liechtenstein	-	0	0	++	-	15	15	++	++	916.01
Armenia	1	0	(1)	-83%	95	12	(82)	-87%	106.24	83.43
Saudi Arabia	-	1	1	++	-	11	11	++	++	16.02
Guyana	-	0	0	++	-	11	11	++	++	40.74
Venezuela	-	0	0	++	-	10	10	++	++	66.16
Greece	0	0	(0)	-53%	15	10	(5)	-34%	36.00	50.31
Ghana	-	0	0	++	-	7	7	++	++	45.00
Argentina	-	0	0	++	-	7	7	++	++	27.65
Palau	-	0	0	++	-	5	5	++	++	31.83
Sri Lanka	0	0	0	116%	10	5	(6)	-56%	100.73	20.46
Maldives	0	0	(0)	-81%	9	5	(4)	-47%	110.94	301.07

Source: U. S. Department of Commerce.



Summary of Total Exports by Country for Current Month - Continued

Description	9L Cases Month LY (000)	9L Cases Month TY (000)	Case Change	% Change	Value Month LY (000)	Value Month TY (000)	Value Change	% Change	USD per Case LY	USD per Case TY
Marshall Islands	-	0	0	++	-	4	4	++	++	24.91
Afghanistan	-	0	0	++	-	4	4	++	++	45.00
Sierra Leone	0	0	(0)	-96%	5	4	(1)	-26%	20.34	345.72
Lithuania	2	0	(2)	-100%	89	4	(86)	-96%	57.95	2,629.38
Georgia	-	0	0	++	-	3	3	++	++	246.00
Cameroon	0	0	0	++	3	3	0	15%	2,600.00	675.00
Croatia	1	0	(1)	-89%	163	3	(160)	-98%	267.59	45.00
Malaysia	0	-	(0)	-100%	4	-	(4)	-100%	73.90	++
Paraguay	0	-	(0)	-100%	21	-	(21)	-100%	532.29	++
Iceland	2	-	(2)	-100%	55	-	(55)	-100%	27.44	++
Cyprus	0	-	(0)	-100%	3	-	(3)	-100%	62.59	++
Cambodia	8	-	(8)	-100%	916	-	(916)	-100%	108.65	++
Turkey	0	-	(0)	-100%	16	-	(16)	-100%	165.00	++
Mauritius	0	-	(0)	-100%	3	-	(3)	-100%	13.96	++
Guadeloupe	1	-	(1)	-100%	175	-	(175)	-100%	121.43	++
India	0	-	(0)	-100%	3	-	(3)	-100%	45.00	++
Gambia	0	-	(0)	-100%	4	-	(4)	-100%	157.21	++
Cote d'Ivoire	0	-	(0)	-100%	6	-	(6)	-100%	156.99	++
Anguilla	0	-	(0)	-100%	13	-	(13)	-100%	223.80	++
Montenegro	1	-	(1)	-100%	26	-	(26)	-100%	31.50	++
Ecuador	0	-	(0)	-100%	30	-	(30)	-100%	142.04	++
Grand Total	1,854	2,528	674	36%	102,211	106,053	3,842	4%	55.13	41.95

Source: U. S. Department of Commerce.



Monthly Foreign Currency Exchange Rates

The following pages illustrate foreign currency exchange rates since January 2008

The green lines are the average FX rate for the current month

The yellow line is the average FX rate since January 2008

The exchange rates are illustrated in the manner in which most commerce is described, for example:

For Canada the chart shows how many Canadian dollars would convert to one US dollar.

For Europe the chart shows how many US dollars would convert to one Euro.

When the US Dollar strengthens:

Imports into the US become less expensive.

At \$1.30 US per Euro a 50.00 Euro case of wine costs \$65.00 US

At \$1.15 US per Euro a 50.00 Euro case of wine costs \$57.50 US

US Exports to other countries become more expensive

At \$1.50 US per UK Pound a \$50.00 US case of wine costs 33.33 UK Pounds

At \$1.25 US per UK Pound a \$50.00 US case of wine costs 40.00 UK Pounds

When the US Dollar weakens the reverse occurs.

These shifts in value are compounded by importer mark-ups, retailer markups and potentially taxes when imposed on value.

The relative competitive position of wines from different countries shift as exchange rates shift with a specific currency.

Many producers / importers moderate impacts of foreign currency shifts through hedging.

This is useful in the short to medium term.



Monthly Foreign Currency Exchange Rates

Canadian Dollars per US Dollar



US Dollars per Euro



US Dollars per Great Britain Pound



Australian Dollars per US Dollar



Monthly Foreign Currency Exchange Rates cont.

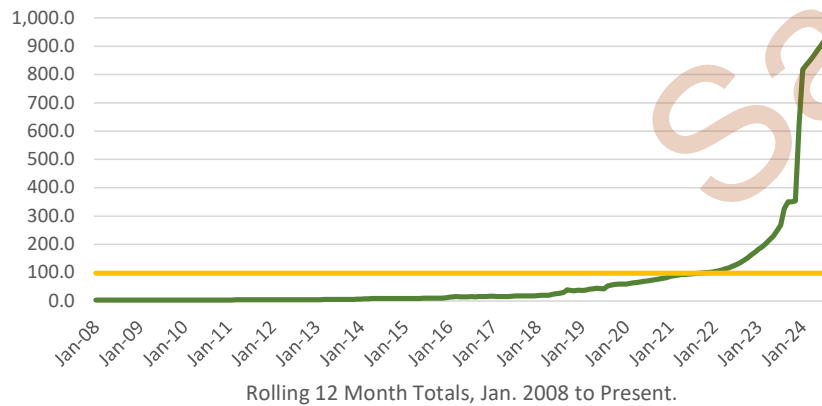
New Zealand Dollars per US Dollar



Chilean Peso per US Dollar



Argentine Pesos per US Dollar



Chinese Yuan per US Dollar

