

Variability of alcohol trends for different varieties of Australian wine

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Background

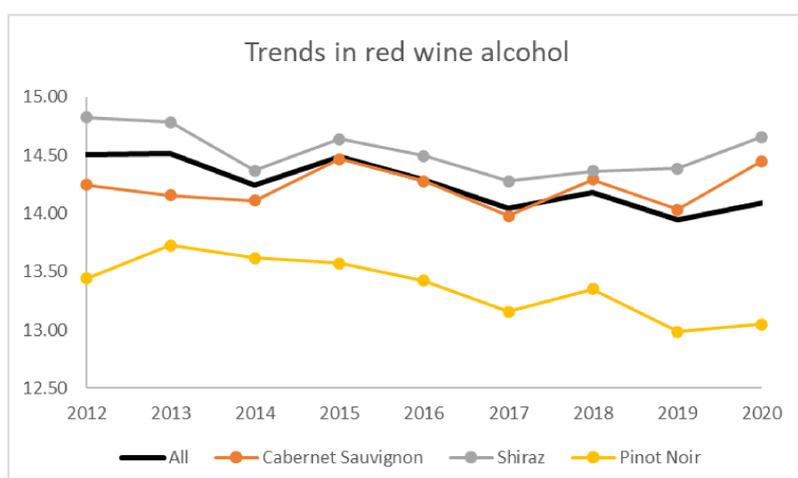
- The overall trend in average alcohol content for Australian wine has been a decrease over at least the past five years.
- This overall picture, however, can conceal what is happening at the varietal level.
- The trends in alcohol content for individual varieties are much less well documented but may be more indicative of climatic impacts and market drivers.
- Understanding varietal-level trends is also important in developing commentary on changing international tax and excise environments and impacts on market access.

Methodology

- The alcohol results for finished wines submitted for export certificates to AWRI Commercial Services' NATA-accredited laboratories were aggregated for vintages 2012 to 2020.
- The results for three major red varieties (Cabernet Sauvignon, Shiraz and Pinot Noir) were compared to the trends for 4,579 red wines of all varieties for the same period.
- The results for four major white varieties (Chardonnay, Riesling, Sauvignon Blanc and Semillon) were compared to the trends for 2,187 white wines of all varieties for the same period.

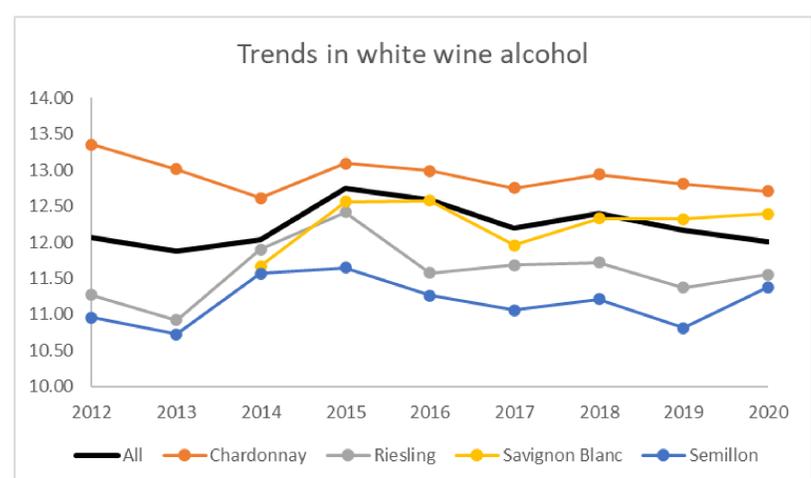
Red wines

Vintage	All	Cabernet Sauvignon	Shiraz	Pinot Noir
2012	14.50	14.24	14.82	13.44
2013	14.52	14.15	14.78	13.73
2014	14.25	14.11	14.37	13.62
2015	14.49	14.47	14.64	13.57
2016	14.29	14.28	14.49	13.42
2017	14.04	13.98	14.28	13.16
2018	14.18	14.29	14.36	13.35
2019	13.95	14.03	14.38	12.99
2020	14.09	14.45	14.66	13.05



White wines

Vintage	All	Chardonnay	Riesling	Sauvignon Blanc	Semillon
2012	12.07	13.35	11.27		10.96
2013	11.87	13.01	10.92		10.73
2014	12.03	12.62	11.90	11.67	11.57
2015	12.74	13.09	12.42	12.56	11.65
2016	12.59	12.99	11.58	12.58	11.26
2017	12.19	12.75	11.69	11.96	11.06
2018	12.40	12.94	11.72	12.33	11.21
2019	12.17	12.81	11.37	12.32	10.82
2020	12.01	12.71	11.55	12.39	11.38



Observations

- The overall trend for alcohol content in red wines has been a decrease of ~0.5% since 2012.
- Pinot Noir has generally followed this trend over the same period.
- Shiraz has, in the last four years, tended to reverse this trend, with alcohol content increasing.
- Cabernet Sauvignon appears to have much greater vintage to vintage variation than the other two red varieties.

Observations

- The overall trend for alcohol content in white wines has been a decrease of ~0.7% since 2015.
- Chardonnay and Riesling have tended to follow this trend.
- Sauvignon Blanc has, in the last four years, tended to reverse this trend, with alcohol content increasing.
- All other white varieties appear to have a greater vintage to vintage variation than Chardonnay.