NZ WINE EXPORTS — MONTHLY REPORT

New Zealand wine exports edge lower as United States surges and European demand weakens

September 2025 · Generated 6 July 2026 · Source: Stats NZ overseas merchandise trade (HS 2204)

Wine exports slipped 1.5 per cent to $163.7 million in September, masking a sharp divergence between booming North American sales and steep declines across key European markets.

September shipments dip despite volume growth

New Zealand exported $163.7 million worth of wine in September 2025, down 1.5 per cent on the same month last year. Volume told a different story, rising 5.3 per cent to 23.1 million litres as the average price per litre fell to $7.09. The sector shipped to 56 destination markets during the month.

The rolling 12-month total to September reached $2.14 billion, up 3.7 per cent year-on-year, indicating the industry has maintained modest growth over the longer view despite monthly fluctuations.

North America drives growth, Europe retreats

The United States dominated September's export performance, accounting for $59.6 million—a 36.4 per cent share—and surging 22.0 per cent year-on-year. Canada added $13.8 million despite a 6.9 per cent decline, cementing North America's position as the critical growth engine.

Europe presented a contrasting picture. The United Kingdom, New Zealand's second-largest market, fell 17.7 per cent to $28.8 million. France dropped 36.1 per cent to $2.7 million, whilst Germany collapsed 57.4 per cent to $2.1 million and Singapore plunged 43.8 per cent to $2.4 million.

Australia, the third-largest destination, declined 11.6 per cent to $27.7 million, claiming a 16.9 per cent market share.

Smaller markets register dramatic gains

Several smaller markets recorded eye-catching growth. Latvia led the charge with a 420.6 per cent surge to $1.0 million, followed by Thailand up 172.4 per cent to $0.5 million and Denmark rising 131.1 per cent to $0.7 million. Sweden grew 66.2 per cent to $0.7 million.

Ireland climbed 38.6 per cent to $5.5 million, securing a 3.4 per cent share and emerging as the fifth-largest market. South Korea jumped 49.2 per cent to $3.3 million, whilst China increased 30.9 per cent to $4.4 million and the Netherlands rose 25.9 per cent to $2.9 million.

Bulk exports slide as bottled shipments flatten

Bulk wine in containers exceeding 10 litres accounted for $43.2 million—26.4 per cent of September's total value—but declined 5.8 per cent year-on-year. Bottled wine in containers of two litres or less generated $120.5 million, edging up just 0.2 per cent.

The price differential between formats remained stark: bottled wine averaged $10.66 per litre compared with $3.67 per litre for bulk, a gap of $6.99 per litre. This nearly threefold premium underscores the value concentration in finished, branded product destined for retail channels, whilst bulk shipments—likely for bottling offshore or use in blends—command substantially lower returns.

Provisional data

These figures are drawn from Statistics New Zealand's merchandise trade data for September 2025. As with all recently released trade statistics, the most recent month's data are provisional and subject to revision as late declarations are processed and classifications finalised.