Wine Australia Market Insights

Variety snapshot 2026 - Merlot

Variety	**Merlot**
Colour	**Red**

Plantings

Source: ABS 2015	Merlot	All varieties
Area planted in Australia (hectares)	8,477	135,133
Percentage of total area	6.3%	
Percentage of red varieties	9.8%	

Crush

Source: National Vintage Survey 2026	Merlot	All varieties
Tonnes crushed in 2026	56,156	1,265,671
Percentage of total crush	4.4%	
Percentage of red crush	9.4%	

Top five regions % of total crush	Merlot	All varieties
Riverland	41%	31%
Riverina	23%	19%
Murray Darling - Swan Hill VIC	10%	11%
Murray Darling - Swan Hill NSW	6%	10%
Coonawarra	5%	3%
Others	16%	26%

Exports

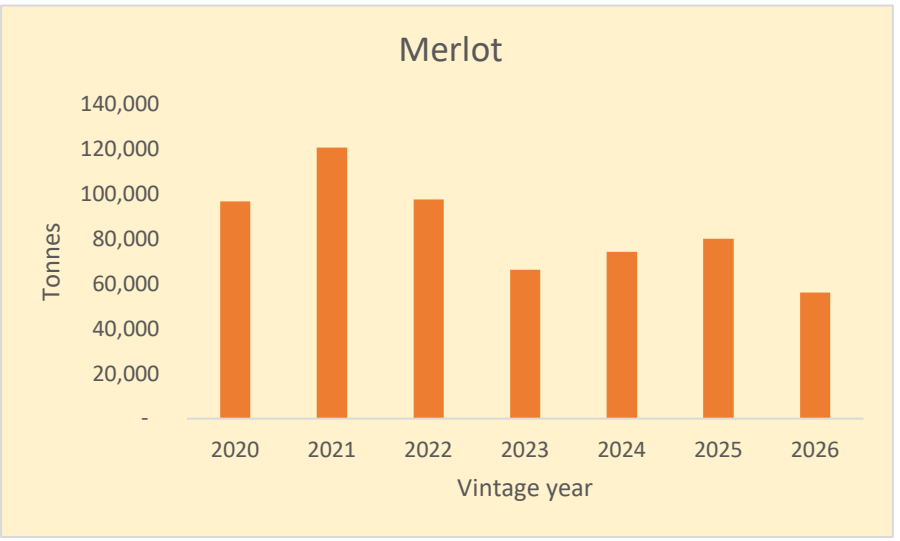
Source: Wine Australia Wine Export Approval System 2025-26

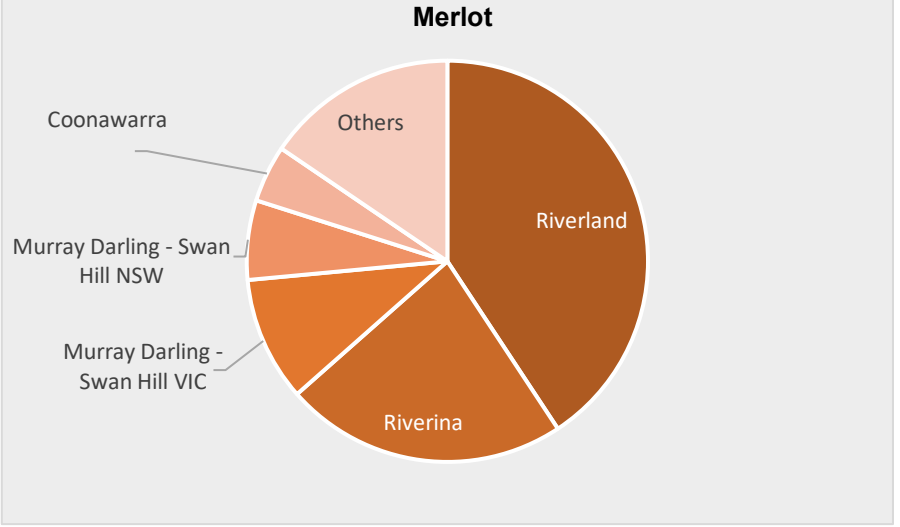
Exports by variety content	Merlot	All varieties
Export volume ('000 litres)	35,114	596,929
Export value ($'000 FOB)	65,843	2,295,383
Share of export volume	5.9%	
Share of export value	2.9%	

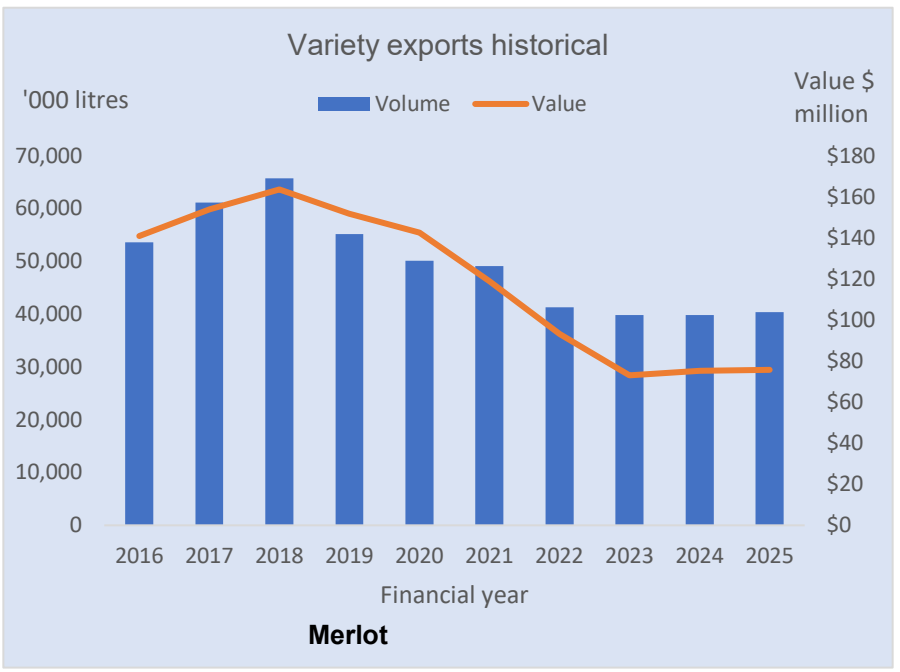
Label claim exports (packaged only)	Merlot and Merlot blends	All packaged wine exports
Total exports ('000 litres) in 2025-26	9,104	191,153
Change in volume from 2024-25	-12%	-10%
Total export value ($'000 FOB) in 2025-26	38,592	1,837,204
Average value per litre	$4.24	$9.61

Top five export destinations and share of exports by value	Merlot and Merlot blends	All packaged wine exports
USA	34%	9%
New Zealand	13%	5%
Hong Kong	7%	5%
China mainland	7%	39%
UK	6%	6%
Others	33%	36%

Top five varietal label claims by value with Merlot in the name
Merlot
Merlot, Shiraz
Merlot, Cabernet Franc
Merlot, Petit Verdot, Cabernet Sauvignon
Merlot, Cabernet Sauvignon









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