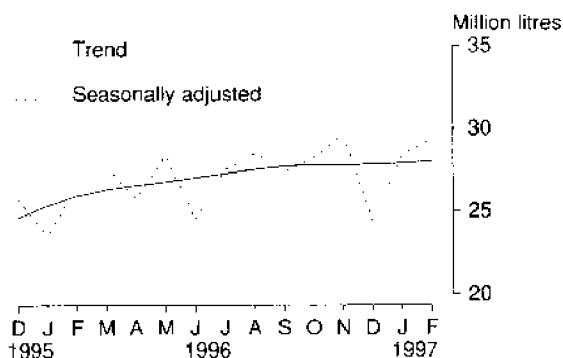


SALES OF AUSTRALIAN WINE AND BRANDY BY WINEMAKERS, FEBRUARY 1997

SUMMARY OF FINDINGS

DOMESTIC SALES OF AUSTRALIAN PRODUCED WINE



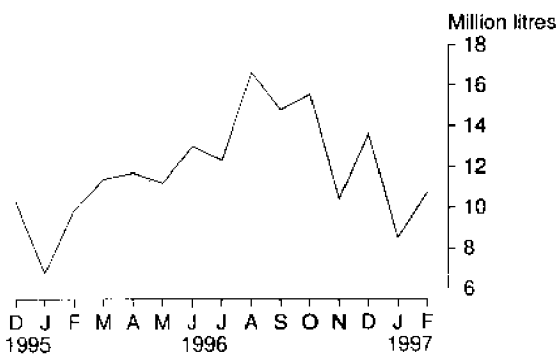
DOMESTIC SALES

The trend estimate for the total domestic sales of Australian produced wine rose by 0.5% in February. The trend series now shows continuous growth since November 1995.

The seasonally adjusted estimate for the total domestic sales of Australian produced wine was 29.4 million litres, a rise of 3.4% on the previous month. The seasonally adjusted estimate would need to fall by 10% or more in March 1997 before the trend series would be in decline.

In original terms, there were 24.8 million litres of Australian produced wine sold domestically during February, up 38.1% on January 1997 and 6.8% on February 1996.

EXPORTS OF AUSTRALIAN PRODUCED WINE

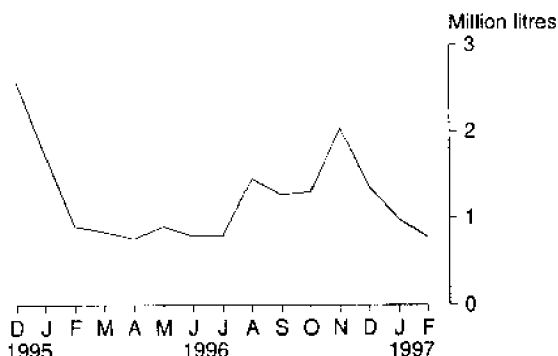


EXPORTS

A total of 10.8 million litres of Australian wine valued at \$43.5 million were exported in February. This quantity is 26.2% more than January 1997 and 9.1% more than February 1996.

Exports to the United Kingdom were 5.4 million litres of wine at a value of \$ 19.0 million. This represents 50.6% in quantity and 43.8% in value of the total February exports.

WINE IMPORTS CLEARED FOR HOME CONSUMPTION



IMPORTS CLEARED FOR HOME CONSUMPTION

Australia cleared 0.8 million litres of imported wine for home consumption in February, down 21.8% on January and 13.9% on February 1996. Table wine represented 78.1% of the total quantity of imports.

The average price per litre of wine imports cleared for home consumption was \$5.28 compared with \$5.21 in January and \$3.57 in February 1996.

INQUIRIES

- for more information about statistics in this publication and the availability of related unpublished statistics, contact Peter Carmalt on Adelaide (08) 8237 7632 or any ABS State Office.
- for information about other ABS statistics and services please refer to the back of this publication.

DOMESTIC SALES OF AUSTRALIAN PRODUCED TABLE WINE, ORIGINAL DATA

Table wine	3 months ended February		% change
	1996	1997	
	'000 L	'000 L	
White — bottles 1 litre and under	12 963	14 396	11.1
White — other containers	31 545	30 017	-4.8
<i>Total white</i>	44 508	44 413	-0.2
Red — bottles 1 litre and under	6 727	8 688	29.2
Red — other containers	6 135	7 386	20.4
<i>Total red</i>	12 862	16 074	25.0
Total table wine (includes Rosé)	58 553	61 516	5.1

Total sales of Australian produced table wine rose by 5.1% in the past 3 months compared with the same period 12 months ago. Red table wine sales rose by 25.0% with a 29.2% rise in bottle sales and a 20.4% rise in sales of other containers (mostly soft packs). White table wine sales fell by 0.2% with bottles up 11.1% and other containers down 4.8%.

The volume of wine sales reported above does not include any quantity of imported wine that may have been blended with the Australian product and this has particularly applied to wine sold in other containers.

WINE AVAILABLE FOR CONSUMPTION IN AUSTRALIA, ORIGINAL DATA

Period	Domestic sales of Australian produced wine	Imports cleared for home consumption	Available for consumption
	'000 L	'000 L	'000 L
1993-94	319 534	8 341	327 875
1994-95	313 357	14 057	327 414
1995-96	309 462	20 256	329 718
1996			
3 months ended February	74 450	5 182	79 632
1997			
3 months ended February	77 360	3 123	80 483

There was an increase of 0.9 million litres or 1.1% in the wine available for consumption for the 3 months to February compared with the same period a year ago. The decrease of 2.1 million litres in imports was offset by the increase of 2.9 million litres in the domestic sales of Australian produced wine.

DISPOSALS OF AUSTRALIAN PRODUCED WINE, ORIGINAL DATA

Period	Domestic sales of Australian produced wine	Exports of Australian produced wine	Total disposals
	'000 L	'000 L	'000 L
1993-94	319 534	125 464	444 998
1994-95	313 357	113 663	427 020
1995-96	309 462	129 650	439 112
1996			
3 months ended February	74 450	27 048	101 498
1997			
3 months ended February	77 360	32 953	110 313

There was an increase of 8.8 million litres or 8.7% in the disposal of Australian produced wine for the 3 months to February 1997 compared with the same period a year ago. This increase is a result of a rise of 2.9 million litres (3.9%) in the domestic sales of Australian produced wine combined with a rise of 5.9 million litres (21.8%) in exports.

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DOMESTIC SALES OF AUSTRALIAN WINE AND BRANDY BY WINEMAKERS

Period	Wine type						Total wine			
	Table	Fortified	Sparkling	Carbonated	Flavoured ¹	Vermouth	Original	Seasonally adjusted	Trend estimate ²	Brandy ³
	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L
1993-94	254 702	27 026	30 598	3 525	2 426	1 258	319 534	1 301
1994-95	251 586	27 000	28 000	3 434	2 218	1 119	313 357	1 188
1995-96	247 274	25 865	30 148	3 089	2 087	999	309 462	1 113
1995-96—										
December	27 378	2 587	5 890	468	220	126	36 670	25 734	24 635	136
January	11 962	1 119	1 139	149	108	62	14 539	23 593	25 355	90
February	19 213	1 673	1 902	236	126	89	23 241	26 423	25 964	84
March	21 558	1 863	1 928	276	151	68	25 845	27 682	26 342	50
April	19 990	2 197	1 850	150	165	48	24 400	25 765	26 591	81
May	22 417	2 734	2 060	248	209	81	27 750	28 392	26 765	96
June	19 083	2 333	1 465	227	153	70	23 331	24 479	27 017	83
1996-97—										
July	25 043	3 070	2 014	244	238	123	30 732	27 554	27 305	109
August	22 614	2 160	2 254	199	205	71	27 503	28 495	27 550	104
September	21 690	1 872	3 059	322	152	64	27 159	27 415	27 755	66
October	22 193	2 119	3 777	335	178	86	28 688	28 237	27 838	87
November	27 834	2 357	4 618	453	215	117	35 594	29 663	27 850	104
December	25 798	2 376	5 537	512	208	121	34 551	24 454	27 862	122
January	14 677	1 297	1 570	163	179	91	17 976	28 415	27 916	54
February	21 041	1 510	1 804	286	112	81	24 833	29 387	28 056	65

¹ Includes wine cocktails, marsala, aperitif and tonic wines.

² Trend estimates for the most recent months are provisional and can be revised as data for additional months become available.

³ Quantities on which excise duty was paid.

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DOMESTIC SALES OF AUSTRALIAN FORTIFIED AND SPARKLING WINE AND VERMOUTH BY WINEMAKERS

Period	Fortified wine						Sparkling wine ¹		Vermouth	
	Sherry			Dessert wine			Bottle fermentation	Bulk fermentation	Dry	Sweet
	Dry	Medium ²	Sweet	Port	Muscat	Other ³				
'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L
1993-94	1 889	2 318	6 133	15 383	1 180	124	26 305	4 293	564	694
1994-95	1 833	2 331	5 947	15 634	1 104	151	23 629	4 371	494	624
1995-96	1 785	2 291	5 592	15 096	1 003	98	22 923	7 226	440	559
1995-96—										
December	166	211	522	1 585	92	11	4 503	1 387	n.p.	n.p.
January	79	106	286	594	47	7	810	329	24	37
February	119	151	380	947	70	6	1 325	577	38	52
March	141	151	385	1 106	73	7	1 454	474	32	37
April	143	207	466	1 289	84	7	1 359	491	22	26
May	153	212	585	1 674	101	8	1 533	527	36	44
June	137	182	489	1 441	77	6	1 108	357	30	40
1996-97—										
July	190	283	654	1 802	132	9	1 544	470	56	67
August	130	168	364	1 388	101	10	1 609	644	31	40
September	115	160	359	1 145	89	5	2 118	941	36	28
October	155	204	487	1 174	91	9	2 797	980	29	56
November	130	203	493	1 432	90	9	3 421	1 197	51	66
December	129	190	457	1 497	93	10	3 853	1 683	56	65
January	94	122	306	704	65	6	1 057	512	n.p.	n.p.
February	116	129	323	873	63	5	1 316	488	30	51

¹ Spritzig table wines are included with table wine.

² Includes semi-sweet and medium dry.

³ Includes madeira, tokay and white port.

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DOMESTIC SALES OF AUSTRALIAN TABLE WINE BY CONTAINER TYPE

Period	WHITE WINE NOT EXCEEDING 1 DEGREE BAUMÉ ¹					WHITE WINE EXCEEDING 1 DEGREE BAUMÉ ¹						
	Glass containers					Glass containers						
	1 litre and under		Over 1 litre	Soft pack ²	Bulk ³	Total	1 litre and under		Over 1 litre	Soft pack ²	Bulk ³	Total
	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L
1993-94	45 025	1 146	117 172	5 145	168 488	3 110	179	20 590	87	23 967		
1994-95	49 063	964	110 435	3 730	164 192	2 794	n.p.	18 888	n.p.	21 970		
1995-96	48 033	657	106 049	2 861	157 601	2 553	137	18 306	112	21 109		
1995-96—												
December	5 903	71	11 606	486	18 067	351	22	1 991	14	2 378		
January	2 431	32	5 400	215	8 078	153	n.p.	1 011	n.p.	1 178		
February	3 927	51	8 724	280	12 982	198	n.p.	1 608	n.p.	1 825		
March	4 225	50	9 435	159	13 869	158	11	1 735	8	1 912		
April	3 929	46	8 607	152	12 734	229	n.p.	1 393	n.p.	1 640		
May	3 997	53	9 588	161	13 799	221	9	1 771	11	2 012		
June	3 307	45	7 976	173	11 500	155	n.p.	1 457	n.p.	1 630		
1996-97—												
July	4 281	55	9 972	171	14 480	190	n.p.	1 672	n.p.	1 884		
August	4 375	42	8 703	186	13 306	202	n.p.	1 624	n.p.	1 847		
September	4 275	47	8 790	209	13 321	254	n.p.	1 559	n.p.	1 836		
October	4 298	51	9 274	258	13 881	210	12	1 572	12	1 806		
November	5 522	66	11 323	281	17 192	265	n.p.	2 219	n.p.	2 509		
December	5 842	61	10 294	373	16 570	332	n.p.	1 924	n.p.	2 287		
January	3 189	43	5 612	432	9 276	161	8	1 217	9	1 395		
February	4 699	56	8 225	128	13 108	173	n.p.	1 588	n.p.	1 777		
Period	RED					ROSE						
	Glass containers					Glass containers						
	1 litre and under		Over 1 litre	Soft pack ²	Bulk ³	Total	1 litre and under		Over 1 litre	Soft pack ²	Bulk ³	Total
	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L
1993-94	27 575	444	28 399	942	57 359	578	n.p.	4 178	n.p.	4 888		
1994-95	30 013	591	29 453	576	60 633	570	116	4 094	12	4 792		
1995-96	33 172	420	29 964	313	63 869	535	n.p.	4 056	n.p.	4 695		
1995-96—												
December	3 019	36	3 229	46	6 330	n.p.	12	510	n.p.	603		
January	1 343	18	1 093	11	2 465	28	n.p.	206	n.p.	241		
February	2 365	19	1 666	17	4 067	40	n.p.	291	n.p.	339		
March	2 944	29	2 443	18	5 434	37	n.p.	299	n.p.	343		
April	2 992	31	2 226	18	5 266	n.p.	n.p.	307	n.p.	351		
May	3 139	43	2 988	31	6 200	n.p.	7	356	n.p.	407		
June	2 644	28	2 908	24	5 604	36	n.p.	307	n.p.	349		
1996-97—												
July	4 281	36	3 800	29	8 146	49	n.p.	475	n.p.	533		
August	3 801	39	3 214	24	7 079	37	n.p.	338	n.p.	382		
September	3 170	27	2 961	39	6 196	37	n.p.	294	n.p.	337		
October	3 207	30	2 842	33	6 112	43	n.p.	343	n.p.	394		
November	3 634	41	3 920	29	7 624	58	n.p.	443	n.p.	509		
December	3 413	30	2 994	56	6 492	71	n.p.	368	n.p.	450		
January	2 122	15	1 579	55	3 771	35	n.p.	195	n.p.	235		
February	3 153	23	2 581	54	5 811	38	n.p.	299	n.p.	344		

¹ 1 degree baumé= 18 grams of sugar per litre.² Soft pack containers include all collapsible packs, plastic or otherwise.³ Bulk includes rigid containers (plastic, steel, wood), tankers and cans.

4

WINE AND BRANDY: IMPORTS CLEARED FOR HOME CONSUMPTION AND EXPORTS OF AUSTRALIAN PRODUCE

Period	Wine type				Total wine		Brandy	
	Table	Fortified	Sparkling	Other	Quantity	Value	Quantity	Value
	'000 L	'000 L	'000 L	'000 L	000 L	\$'000	000 L al	'000
IMPORTS CLEARED¹								
1993-94	4 432	152	2 301	1 456	8 341	47 637	634	8 243
1994-95	9 398	272	3 065	1 322	14 057	61 057	590	7 266
1995-96	16 649	105	2 673	830	20 256	60 478	583	7 462
1995-96—								
December	2 152	9	319	84	2 564	8 064	53	926
January	1 483	5	175	54	1 718	4 422	54	637
February	691	12	144	53	900	3 213	49	632
March	678	10	96	52	836	3 145	34	458
April	547	2	125	85	759	3 403	56	550
May	700	9	132	58	899	4 065	51	588
June	641	4	118	28	791	3 046	34	384
1996-97—								
July	566	2	127	94	789	3 715	60	703
August	r1 265	10	96	80	r1 451	r5 790	58	727
September	917	22	228	98	1 265	r6 118	50	562
October	746	19	322	214	1 301	7 152	52	716
November	1 573	8	354	100	2 036	8 073	70	905
December	954	8	320	75	1 357	8 373	85	1 059
January	719	15	234	24	991	5 168	40	678
February	605	7	156	6	775	4 092	42	516
EXPORTS²								
1993-94	116 655	2 873	5 042	893	125 464	366 574	36	524
1994-95	105 542	2 475	5 109	537	113 663	385 704	36	812
1995-96	r121 018	2 506	r5 487	r639	r129 650	r471 451	r24	r731
1995-96—								
December	r9 769	170	r402	r39	r10 379	r40 652	3	83
January	6 237	262	254	37	6 790	r26 582	3	60
February	9 189	154	491	r45	9 879	r34 907	1	62
March	r10 587	326	456	63	r11 431	r42 330	1	62
April	r11 177	121	390	43	r11 731	r41 229	—	7
May	r10 710	139	337	r61	r11 246	r41 688	2	95
June	12 309	164	537	63	r13 073	r48 111	4	r68
1996-97—								
July	11 603	174	522	51	r12 351	r45 136	—	18
August	r15 465	387	756	66	r16 674	r62 700	3	79
September	r13 733	269	r751	72	r14 824	r54 926	4	89
October	r14 169	r325	r955	124	r15 573	r59 437	2	64
November	r9 772	r94	r557	49	r10 472	r41 260	2	51
December	r12 908	256	r383	88	r13 635	r50 480	2	68
January	8 060	127	261	92	8 540	34 089	—	9
February	10 235	72	441	29	10 778	43 454	—	17

¹ Due to a change in the Customs Tariff codes implemented in July 1996, the wine type categories are not necessarily comparable with previous data reported.

² Exports may include sales made by exporters other than winemakers.

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EXPORTS OF AUSTRALIAN WINE BY COUNTRY OF DESTINATION, FEBRUARY 1997

Country/region	Wine type				Total wine	
	Table	Fortified	Sparkling	Other	Quantity	Value
	litres	litres	litres	litres	litres	\$'000
Fiji	25 428	270	9 510	—	35 208	173
New Zealand	471 514	18 295	67 846	—	557 655	2 377
Vanuatu	53 403	—	990	—	54 393	113
Total Oceania & Antarctica¹	582 691	20 961	81 571	2 000	687 223	2 842
Denmark	219 648	—	—	—	219 648	950
Germany, Federal Republic of	194 365	9 375	—	225	203 965	945
Ireland	206 406	—	—	1 854	208 260	783
Netherlands	138 328	—	—	—	138 328	577
Norway	109 284	—	10 008	—	119 292	398
Sweden	246 369	—	—	—	246 369	715
Switzerland	116 808	135	7 515	—	124 458	712
United Kingdom	5 173 806	6 705	265 923	2 475	5 448 909	19 025
Total Europe & The CIS¹	6 621 802	16 215	290 790	7 911	6 936 718	25 063
Israel	11 270	—	—	—	11 270	59
United Arab Emirates	81 320	—	8 078	—	89 398	179
Total Middle East¹	102 338	—	8 816	—	111 154	259
Singapore	74 871	445	3 372	183	78 871	628
Thailand	133 870	675	1 350	—	135 895	488
Total Southeast Asia¹	263 033	2 074	20 104	948	286 159	1 494
Hong Kong	183 134	45	13 949	2 717	199 845	1 068
Japan	197 026	9 180	1 311	6 147	213 664	941
Total Northeast Asia¹	452 231	10 098	22 577	8 864	493 770	2 445
Canada	638 574	8 820	9 324	1 008	657 726	2 647
United States of America	1 546 871	13 743	7 839	8 406	1 576 859	8 562
Total North America¹	2 185 445	22 563	17 163	9 414	2 234 585	11 209
Total Other Regions²	27 552	—	378	—	27 930	141
Total All Countries	10 235 092	71 911	441 399	29 137	10 777 539	43 454

¹ Includes other countries as detailed in *Australian Standard Classification of Countries for Social Statistics* (1269.0). ² Includes ships' stores.

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EXPORTS OF AUSTRALIAN WINE BY REGION¹

Period	Oceania and Antarctica	Europe and the Former USSR	Middle East and East and North Africa	Southeast Asia	Northeast Asia	Northern America	Other ²	Total all regions
	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L
	1993-94	24 968	73 334	952	2 134	5 268	18 463	346
1994-95	17 144	69 782	1 014	2 197	4 307	18 786	434	113 663
1995-96	r14 659	r83 835	946	r3 522	r4 446	r21 991	251	r129 650
1995-96—								
December	707	6 691	61	335	371	r2 209	4	r10 379
January	441	4 582	46	376	238	1 081	25	6 790
February	1 781	5 821	119	329	r411	1 402	16	9 879
March	r1 400	6 816	99	r340	421	2 319	36	r11 431
April	r1 239	7 599	100	416	321	2 023	33	r11 731
May	r938	7 484	125	249	333	2 086	30	r11 246
June	934	9 560	33	235	402	1 897	12	r13 073
1996-97—								
July	r 1 704	7 522	117	313	278	2 377	38	r12 351
August	r1 548	r11 330	55	296	395	r3 033	15	r16 674
September	r1 564	r9 467	32	r419	r389	r2 900	55	r14 824
October	r2 144	r9 914	61	345	r570	r2 511	r28	r15 573
November	r1 933	r5 939	95	423	r444	r1 617	r21	r10 472
December	r1 264	r9 048	r45	r336	861	2 060	r22	r13 635
January	1 223	4 705	58	226	695	1 622	13	8 540
February	687	6 937	111	286	494	2 235	28	10 778

¹ Exports may include sales made by exporters other than winemakers. ² Includes ships' stores.

EXPLANATORY NOTES

INTRODUCTION

1 The information shown in this publication for the domestic sales of Australian produced wine is obtained directly from winemakers by means of a mail collection. The brandy sales figures shown represent quantities on which excise duty was paid, i.e. the quantity of brandy released for sale. Statistics relating to import clearances and exports are based on information provided to the Australian Customs Service by importers, exporters and their agents.

SCOPE AND COVERAGE

2 The information on domestic sales of Australian produced wine is obtained from winemaking enterprises with sales of 250,000 litres or more in the previous financial year. These account for approximately 95% of total wine sales. All sales data are collected on an Australia-wide basis only and State figures are therefore not available.

3 Tables 1–3 include all sales by winemakers (within the scope of the collection) with the exception of exports, sales for ships' stores, sales of imported wine and brandy and inter-winery sales, the last exclusion being necessary to avoid duplication in the published figures. Figures relating to foreign trade in wine and brandy are presented in table 4 to provide a basis for assessing the overall Australian wine market.

4 Imports cleared for home consumption comprise those goods entered for home consumption, together with goods cleared from Customs warehouses. Exports of Australian produce are defined as exports of goods, materials or articles which have been produced, manufactured or partly manufactured in Australia.

SEASONALLY ADJUSTED AND TREND ESTIMATES

5 Seasonal adjustment is a means of removing the estimated effects of normal seasonal variation from the series so that the effects of other influences can be more clearly recognised. Seasonal adjustment does not remove from the series the effect of irregular influences (e.g. abnormal weather and industrial disputes).

6 The smoothing of seasonally adjusted series to create trend estimates is a means of reducing the impact of the irregular component of the series. The trend estimates of wine sales have been derived by applying a 13-term Henderson weighted moving average to the seasonally adjusted series.

7 For further information, see *A Guide to Interpreting Time Series — Monitoring 'Trends', an Overview* (1348.0) or contact the Assistant Director, Time Series Analysis on (06) 252 6345.

RELATED PUBLICATIONS

8 Another ABS publication which may be of interest is the *Australian Wine and Grape Industry* (1329.0) which contains production and stocks of Australian wine and brandy held by winemakers, final viticulture data and a comprehensive range of industry related data, including world comparisons.

9 Current publications produced by the ABS are listed in the *Catalogue of Publications and Products Australia* (1101.0). The ABS also issues, on Tuesdays and Fridays, a *Release Advice* (1105.0) which lists publications to be released in the next few days. The Catalogue and Release Advice are available from any ABS office.

ROUNDING

10 Where figures have been rounded, discrepancies may occur between sums of the component items and totals.

SYMBOLS AND OTHER USAGES

—	nil or rounded to zero
n.p.	not available for separate publication (but included in totals where applicable)
n.y.a.	not yet available
r	figure or series revised since previous issue
..	not applicable

W. McLennan
Australian Statistician

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