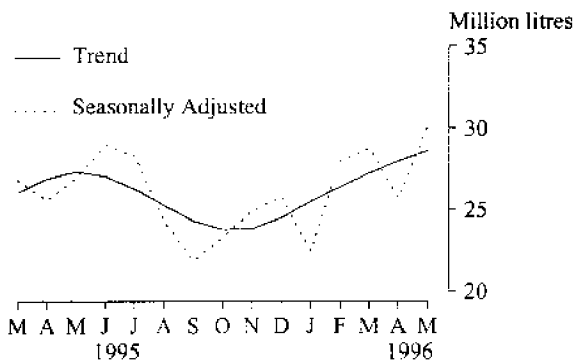


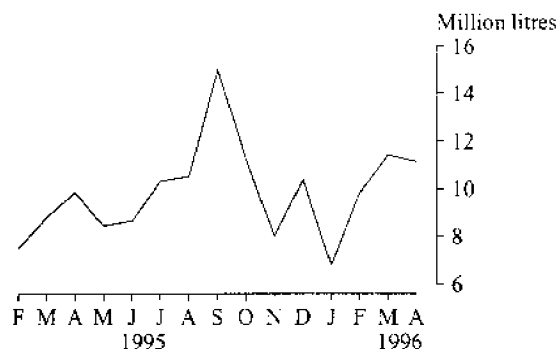
SALES OF AUSTRALIAN WINE AND BRANDY BY WINEMAKERS, MAY 1996

SUMMARY OF FINDINGS

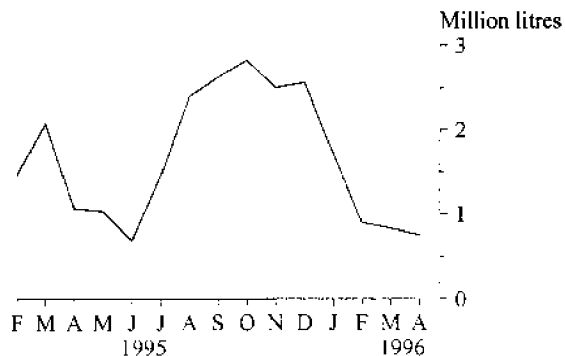
DOMESTIC SALES OF AUSTRALIAN PRODUCED WINE



EXPORTS OF AUSTRALIAN PRODUCED WINE



WINE IMPORTS CLEARED FOR HOME CONSUMPTION



DOMESTIC SALES

The trend estimate for the total domestic sales of Australian produced wine rose by 2.2% in May. This is the seventh month of growth after five months of decline.

The seasonally adjusted estimate of total domestic sales of Australian produced wine for the month was 30.1 million litres, an increase of 17.3% on the previous month. The increase in the seasonally adjusted data for May has strengthened the growth in the wine sales trend series. The seasonally adjusted data for June 1996 would need to fall by more than 17% for the trend series to flatten out.

In original terms, there were 27.8 million litres of Australian produced wine sold domestically during May, an increase of 13.8% on April and 11.9% on May 1995.

EXPORTS

A total of 11.1 million litres of Australian wine valued at \$39.7 million were exported in April. This quantity is a decrease of 2.5% on March but an increase of 12.7% on April 1995.

Most of these exports consisted of table wine (95.4%) while sparkling accounted for 3.3% and fortified 1.1%. Furthermore, of these exports the United Kingdom received 45.7%, the United States of America 13.9% and New Zealand 10.2%.

IMPORTS CLEARED FOR HOME CONSUMPTION

Australia cleared 0.8 million litres of imported wine for home consumption in April which is slightly less than imports cleared in March and 28.8% less than in April 1995. The value of the imports cleared was \$3.4 million which was an 8.2% increase on the previous month.

The majority of imports cleared for April were for table wine (72.1%) while sparkling wine accounted for 16.5%. The average price per litre of wine imports cleared for home consumption in April 1996 was \$4.48, a 19.1% increase on March.

INQUIRIES

- for more information about statistics in this publication and the availability of related unpublished statistics, contact Peter Carmalt on Adelaide (08) 237 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

<i>Table wine</i>	1995	1996	% change
White — bottles 1 litre and under	12 465	12 827	2.9
White — other containers	32 034	33 230	3.7
<i>Total white</i>	44 499	46 057	3.5
Red — bottles 1 litre and under	7 569	9 075	19.9
Red — other containers	6 810	7 863	15.5
<i>Total red</i>	14 379	16 938	17.8
Total table wine (includes Rosé)	60 009	64 096	6.8

During the past 3 months Australian produced red table wine sales rose by 17.8% compared with the same period 12 months ago. This was a result of a 19.9% rise in bottle sales and 15.5% in other containers. Sales of white table wine increased by 3.5%. Other containers (mostly soft packs) increased by 3.7% and bottles by 2.9%. Total sales of Australian produced table wine increased by 6.8%.

The volume of wine sales reported 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. During 1995 imports cleared for home consumption achieved record monthly volumes, though import levels have declined in recent months.

WINE AVAILABLE FOR CONSUMPTION IN AUSTRALIA, ORIGINAL DATA

<i>Period</i>	<i>Domestic sales of Australian</i>	<i>Imports cleared for</i>	<i>Available for</i>
1992-93	312 081	7 832	319 913
1993-94	319 534	8 341	327 875
1994-95	313 357	14 057	327 413
1995			
3 months ended April	70 843	4 599	75 442
1996			
3 months ended April	73 634	2 495	76 129

There was an increase of 0.9% in the wine available for consumption for the 3 months to April 1996 compared with the same period in 1995. There was an increase of 3.9% in the domestic sales of Australian produced wine and a decrease of 45.7% in imports cleared for home consumption.

DISPOSALS OF AUSTRALIAN PRODUCED WINE, ORIGINAL DATA

<i>Period</i>	<i>Domestic sales of Australian</i>	<i>Exports of Australian</i>	<i>Total</i>
1992-93	312 081	102 832	414 913
1993-94	319 534	125 464	444 998
1994-95	313 357	113 663	427 020
1995			
3 months ended April	70 843	26 152	96 995
1996			
3 months ended April	73 634	32 395	106 029

There was an increase of 9.3% in the disposal of Australian produced wine for the 3 months to April 1996 compared with the same period in 1995. Total disposals increased by approximately 9 million litres with exports accounting for 69.1% of this increase.

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DOMESTIC SALES OF AUSTRALIAN WINE AND BRANDY BY WINEMAKERS

Period	Wine type						Total wine			
	Table	Fortified	Spark- ling	Carbon- ated	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 a
1992-93	246 308	28 420	29 971	3 256	2 845	1 281	312 081	1 312
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
1994-95—										
March	19 996	1 818	1 798	239	159	99	24 109	26 840	26 053	87
April	19 863	2 262	1 763	162	177	81	24 309	25 559	26 911	84
May	20 150	2 612	1 571	221	225	67	24 846	26 989	27 311	98
June	23 192	2 967	1 589	319	217	99	28 382	28 968	27 047	102
1995-96—										
July	26 697	3 179	1 959	241	249	83	32 409	28 296	26 284	118
August	18 405	2 292	1 818	253	146	67	22 982	24 291	25 257	116
September	17 434	1 613	2 708	265	123	76	22 219	21 882	24 323	64
October	18 600	1 806	3 214	234	213	69	24 137	23 325	23 796	94
November	22 927	2 476	3 935	335	223	160	30 055	24 947	23 849	104
December	27 269	2 588	5 888	468	220	126	36 559	25 812	24 524	136
January	11 984	1 119	1 139	149	108	62	14 561	22 450	25 505	90
February	19 283	1 673	1 902	236	126	89	23 310	28 000	26 420	84
March	21 601	1 863	1 928	276	151	68	25 887	28 800	27 243	50
April	20 027	2 197	1 850	150	165	48	24 437	25 700	27 997	81
May	22 468	2 734	2 060	248	209	81	27 800	30 136	28 623	96

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 fermen- tation	Bulk fermen- tation	Dry	Sweet
	Dry	Medium ²	Sweet	Port	Muscat	Other ³				
1992-93	2 117	2 500	6 829	15 545	1 257	172	25 252	4 719	581	700
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
1994-95—										
March	123	149	425	1 063	56	3	1 453	345	44	55
April	144	185	482	1 346	88	17	1 480	283	38	43
May	178	229	576	1 516	99	15	1 276	294	26	41
June	186	223	615	1 805	123	15	1 307	281	44	56
1995-96—										
July	218	292	649	1 891	120	10	1 568	391	39	44
August	214	257	505	1 215	92	9	1 504	314	28	39
September	118	146	325	953	64	8	2 011	696	35	42
October	140	154	419	1 003	81	8	2 454	760	30	39
November	159	224	583	1 397	102	11	3 012	923	n.p.	n.p.
December	166	211	522	1 586	92	11	4 503	1 385	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

¹ Spritzig table wines are included with table wine.

² Includes semi-sweet and medium dry.

³ Includes madeira, tokay and white port.

3

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
1992-93	41 243	1 319	120 534	4 784	167 880	2 856	203	15 405	61	18 525
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
1994-95—										
March	4 023	69	9 012	212	13 317	188	18	1 657	12	1 874
April	3 978	64	8 859	193	13 094	195	n.p.	1 361	n.p.	1 577
May	3 892	64	8 914	195	13 065	189	n.p.	1 360	n.p.	1 572
June	4 321	79	10 393	172	14 966	220	n.p.	1 710	n.p.	1 960
1995-96—										
July	4 246	65	12 022	270	16 602	274	n.p.	1 702	n.p.	1 999
August	3 328	56	7 065	321	10 770	200	n.p.	1 276	n.p.	1 498
September	3 502	53	7 005	233	10 793	176	n.p.	1 340	n.p.	1 532
October	4 126	62	7 668	245	12 101	209	n.p.	1 389	n.p.	1 616
November	5 040	82	9 369	284	14 775	231	n.p.	1 675	n.p.	1 928
December	5 846	80	11 592	486	18 005	361	22	1 991	14	2 388
January	2 434	38	5 400	215	8 088	159	n.p.	1 011	n.p.	1 184
February	3 969	57	8 724	280	13 031	198	n.p.	1 608	n.p.	1 825
March	4 252	57	9 435	159	13 902	158	11	1 735	8	1 912
April	3 951	53	8 607	152	12 763	229	n.p.	1 393	n.p.	1 640
May	4 016	63	9 588	161	13 828	221	9	1 771	11	2 012
Period	Red					Rosé				
	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
1992-93	25 268	464	28 677	642	55 051	n.p.	118	4 107	n.p.	4 852
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
1994-95—										
March	2 428	36	1 942	23	4 429	45	n.p.	320	n.p.	376
April	2 587	50	2 151	23	4 810	52	n.p.	320	n.p.	382
May	2 554	51	2 485	50	5 140	28	n.p.	334	n.p.	374
June	3 288	87	2 331	77	5 783	40	n.p.	432	n.p.	484
1995-96—										
July	3 893	41	3 474	37	7 445	62	n.p.	581	n.p.	651
August	2 964	43	2 737	46	5 790	38	n.p.	297	n.p.	347
September	2 422	50	2 282	32	4 786	37	n.p.	278	n.p.	323
October	2 485	42	2 002	21	4 549	46	n.p.	279	n.p.	334
November	2 957	39	2 792	13	5 800	n.p.	7	361	n.p.	424
December	3 007	45	3 175	46	6 272	n.p.	12	510	n.p.	603
January	1 343	25	1 093	11	2 472	28	n.p.	206	n.p.	241
February	2 365	27	1 679	17	4 088	40	n.p.	291	n.p.	339
March	2 944	38	2 443	18	5 443	37	n.p.	299	n.p.	343
April	2 992	39	2 226	18	5 274	n.p.	n.p.	307	n.p.	351
May	3 139	64	2 988	31	6 221	n.p.	7	356	n.p.	407

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 L	'000 L	\$'000
IMPORTS CLEARED								
1992-93	4 833	106	2 346	546	7 832	46 984	629	8 085
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
1994-95—								
February	1 109	4	267	81	1 461	4 256	44	563
March	1 780	9	216	68	2 072	4 483	32	420
April	669	10	323	65	1 066	5 417	34	412
May	796	17	149	71	1 034	4 673	52	570
June	497	9	104	78	688	3 897	31	461
1995-96—								
July	1 206	4	131	99	1 440	3 975	46	556
August	2 109	5	193	90	2 396	5 369	50	675
September	2 293	7	253	74	2 627	6 219	44	651
October	2 349	23	419	36	2 827	7 432	43	618
November	1 799	14	568	117	2 498	8 126	68	786
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
EXPORTS ¹								
1992-93	95 468	1 851	4 730	784	102 832	293 157	73	850
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
1994-95—								
February	6 907	219	328	27	7 481	25 411	3	47
March	8 324	137	294	34	8 789	32 211	3	104
April	9 131	171	508	71	9 882	35 724	3	46
May	7 879	137	382	41	8 439	31 243	5	102
June	8 046	171	350	96	8 663	r32 467	—	16
1995-96—								
July	9 587	159	528	44	10 318	39 026	3	102
August	9 778	280	403	53	10 514	r36 619	3	73
September	14 023	233	719	56	15 031	r51 391	2	26
October	10 264	311	571	68	11 214	41 125	—	8
November	7 364	187	398	69	8 018	27 716	2	84
December	9 766	170	396	38	10 370	40 585	2	59
January	6 237	262	254	37	6 790	26 580	9	60
February	r9 170	131	490	44	r9 835	r34 764	1	62
March	r10 579	326	r455	63	r11 424	r42 265	1	62
April	10 623	120	366	27	11 136	39 654	—	7

¹ Exports may include sales made by exporters other than winemakers.

5

EXPORTS OF AUSTRALIAN WINE BY COUNTRY OF DESTINATION, APRIL 1996

Country/region	Wine type				Total wine	
	Table	Fortified	Sparkling	Other	Quantity	Value
	litres	litres	litres	litres	litres	\$'000
Fiji	20 744	567	5 370	—	26 681	115
New Zealand	1 085 027	9 561	39 780	3 196	1 137 564	2 417
Papua New Guinea	20 632	467	1 155	—	22 254	77
Total Oceania and Antarctica¹	1 175 681	10 649	47 376	3 196	1 236 902	2 717
Denmark	109 097	—	1 530	369	110 996	308
Germany	257 900	576	930	3 250	262 656	817
Ireland	231 339	—	8 685	—	240 024	1 118
Netherlands	115 767	—	—	900	116 667	541
Norway	381 063	—	2 772	2 520	386 355	1 124
Sweden	646 604	—	—	108	646 712	2 079
Switzerland	96 306	90	3 555	—	99 951	687
United Kingdom	4 802 636	48 483	241 288	1 225	5 093 632	16 510
Total Europe and the Former USSR¹	6 747 313	49 266	270 200	8 372	7 075 151	23 714
Oman	16 360	—	315	—	16 675	25
United Arab Emirates	51 200	—	1 350	—	52 550	95
Total Middle East and North Africa¹	81 747	—	3 465	—	85 212	150
Singapore	111 978	4 734	6 870	—	123 582	606
Thailand	192 193	—	430	—	192 623	626
Total Southeast Asia¹	362 826	5 139	12 875	270	381 110	1 540
Japan	77 537	16 000	15 066	4 377	112 980	673
Republic of Korea	109 927	90	—	—	110 017	166
Total Northeast Asia¹	266 320	16 157	21 969	5 646	310 092	1 482
Canada	458 640	8 528	225	—	467 393	2 320
USA	1 501 310	27 203	6 435	9 879	1 544 827	7 577
Total Northern America	1 962 200	35 731	6 660	9 879	2 014 470	9 906
Total Other Regions²	27 092	3 000	3 033	—	33 125	143
Total all Countries	10 623 179	119 942	365 578	27 363	1 136 062	39 654

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

6

EXPORTS OF AUSTRALIAN WINE BY REGION¹

Period	Europe and Middle						Other	Total all regions
	Oceania and Antarctica	the Former USSR	East and North Africa	Southeast Asia	Northeast Asia	Northern America		
	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L		
1992-93	18 251	61 623	799	1 969	3 483	16 356	351	102 832
1993-94	24 968	73 334	952	2 134	5 268	18 463	346	125 464
1994-95	17 144	69 782	1 014	2 197	4 307	18 786	434	113 663
1994-95—								
February	1 602	4 002	62	200	277	1 303	35	7 481
March	980	5 692	179	166	173	1 552	47	8 789
April	743	6 818	31	115	541	1 610	23	9 882
May	815	5 241	141	251	212	1 743	36	8 439
June	945	5 415	88	144	253	1 780	39	8 663
1995-96—								
July	1 210	6 428	92	227	544	1 807	10	10 318
August	1 387	6 568	—	157	219	2 163	19	10 514
September	1 803	10 334	157	246	330	2 154	7	15 031
October	821	7 931	20	194	448	1 758	43	11 214
November	1 993	4 016	94	417	392	1 092	14	8 018
December	707	6 683	61	335	371	2 208	4	10 370
January	441	4 582	46	376	238	1 081	25	6 790
February	1 745	5 818	116	327	410	1 402	16	9 835
March	1 396	6 814	199	339	420	1 319	36	11 424
April	1 237	7 075	85	381	310	2 014	33	11 136

¹ Exports may include sales made by exporters other than winemakers.

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 97% 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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