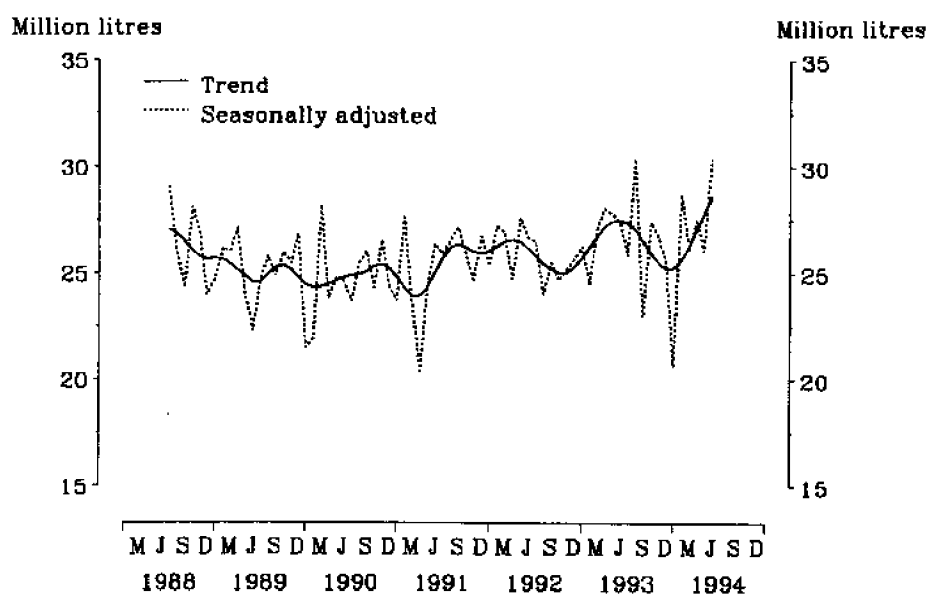


SALES OF AUSTRALIAN WINE AND BRANDY BY WINEMAKERS, JUNE 1994

SUMMARY OF FINDINGS

DOMESTIC WINE SALES



Domestic sales

The trend series for total domestic wine sales grew by 2.9 per cent between May and June 1994, following an equivalent increase between April and May 1994. This is now the sixth month of trend growth following declining trend sales between June and December 1993.

The trend growth has strengthened with seasonally adjusted sales rising by 16.7 per cent during June 1994 to 30.4 million litres, after a fall of 5.4 per cent in May 1994. Seasonally adjusted sales would have to fall in July 1994 by 21.0 per cent (the average monthly movement regardless of sign in this series is 6.9 per cent) for the trend to flatten out. Readers are reminded that recent trend estimates are provisional and could change when data for future months become available.

In original terms, total domestic sales rose by 15.9 per cent during June 1994 to 27.5 million litres. Most of the growth in domestic wine sales in June was due to increases in white and red table wines. In 1993-94, 319.5 million litres of wine were sold in Australia by

winemakers, the highest annual level of sales since 1987-88. A detailed comparison of the last two financial years' domestic sales data is presented on Page 2.

Exports

A total of 10.2 million litres of wine valued at \$31.3 million was exported from Australia in May 1994. This is slightly down in terms of volume from April 1994 and 17.9 per cent lower than May 1993.

In the eleven months to May 1994, Australia has exported 113.8 million litres of wine worth \$333.0 million, 24.7 per cent higher by volume and 28.5 per cent higher by value than for the corresponding period in 1992-93.

When comparing the latest eleven months data with the same period in 1992-93 the Oceania region continues to record the biggest percentage increase with export volume up 49.0 per cent or 7.8 million litres, followed by Northeast Asia with an increase of 41.3 per cent or 1.3 million litres. However, the European region records the biggest increase in terms of volume with exports up by 11.3 million litres (20.8%).

INQUIRIES

- for further information about statistics in this publication and the availability of related unpublished statistics, contact Peter Carmalt on Adelaide (08) 237 7626 or any ABS State Office.
- for information about other ABS statistics and services please refer to the back page of this publication.

SUMMARY OF FINDINGS (continued)

Imports

Australia imported 0.5 million litres of wine at a cost of \$3.0 million in May 1994. For the eleven months to May 1994, Australia has imported 7.5 million litres of wine, 2.6 per cent more than for the same period in 1992-93. These imports cost \$43.2 million, 2.5 per cent less than the amount paid for wine imports in 1992-93.

A comparison of domestic wine sales (original data) for 1992-93 and 1993-94 follows.

Wine type	1992-93	1993-94	Percentage change
	'000L	'000L	
Table			
White - bottles 1 litre and under	44,099	48,135	9.2
White - other containers	142,307	144,319	1.4
<i>Total</i>	<i>186,406</i>	<i>192,454</i>	<i>3.2</i>
Red - bottles 1 litre and under	25,267	27,575	9.1
Red - other containers	29,782	29,824	0.1
<i>Total</i>	<i>55,049</i>	<i>57,399</i>	<i>4.3</i>
Rose - bottles 1 litre and under	613	578	-5.7
Rose - other containers	4,240	4,309	1.6
<i>Total</i>	<i>4,853</i>	<i>4,887</i>	<i>0.7</i>
Total table wine	246,308	254,740	3.4
Fortified	28,420	27,026	-4.9
Sparkling			
Bottle fermented	25,252	26,305	4.2
Bulk fermented	4,719	4,238	-10.2
<i>Total sparkling wine</i>	<i>29,971</i>	<i>30,543</i>	<i>1.9</i>
Other	7,383	7,208	-2.4
TOTAL WINE SALES	312,082	319,517	2.4

Total domestic sales of Australian wine by winemakers for the financial year 1993-94 rose by 2.4 per cent to 319.5 million litres, the highest financial year total since 1987-88.

There were 254.7 million litres of table wine sold in 1993-94, a 3.4 per cent rise on sales in 1992-93. However, sales by wine and container type within this category show marked variations as highlighted below:

- White table wine sales increased 3.2 per cent, with a 9.2 per cent increase in sales of bottled wine leading a smaller increase in wine sold in other containers, mainly soft pack.
- Red table wine sales increased by 4.3 per cent, also dominated by a strong increase in the sales of bottled wine (9.1%).
- Rose wine sales increased 0.7 per cent, with a decrease in the sales of bottled wine (-5.7%) more than offset by a 1.6 per cent rise in rose in other containers.

The remaining wine types also varied in their sales performance when compared to the previous financial year. Fortified wine sales decreased by 4.9 per cent along with sales of other wine types which fell 2.4 per cent. Sales of sparkling wine, however, increased by 1.9 per cent with bottle fermented increasing by 4.2 per cent while bulk fermented recorded its third successive annual decline, down 10.2 per cent.

TABLE 1. DOMESTIC SALES OF AUSTRALIAN WINE AND BRANDY BY WINEMAKERS

Period	Wine type						Total wine			Brandy(b)
	Table	Fortified	Spark-ling	Carbon-ated	Flavoured (a)	Vermouth	Original	Seasonality adjusted	Trend estimate	
	('000 litres)									('000L al)
1991-92	246,704	29,891	30,153	3,751	2,921	1,410	314,830	1,380
1992-93	246,308	28,420	29,971	3,256	2,845	1,281	312,081	1,312
1993-94	254,741	27,026	30,543	3,525	2,426	1,258	319,519	n.y.a.
1992-93—										
April	21,895	2,329	2,121	208	231	112	26,896	28,072	27,210	97
May	20,319	2,660	1,848	201	217	71	25,315	27,790	27,466	116
June	19,688	3,015	1,515	182	250	84	24,735	27,345	27,491	104
1993-94—										
July	23,632	2,923	2,048	354	276	122	29,356	25,849	27,398	139
August	25,198	2,626	2,795	279	270	66	31,234	30,419	27,047	177
September	18,283	2,132	1,749	255	204	102	22,724	22,973	26,513	87
October	22,814	1,772	3,339	253	181	139	28,496	27,422	25,954	87
November	25,291	2,526	4,227	375	312	128	32,857	26,719	25,506	132
December	27,119	2,755	6,410	509	251	154	37,198	25,608	25,221	151
January	10,926	1,154	1,197	153	n.p.	n.p.	13,652	20,604	25,261	72
February	18,836	1,568	1,968	228	n.p.	n.p.	22,784	28,749	25,683	76
March	19,416	1,965	1,720	217	136	111	23,565	26,140	26,305	93
April	21,417	2,659	1,725	268	188	66	26,323	27,518	27,061	108
May	19,210	2,354	1,674	278	179	84	23,779	26,045	27,845	93
June	22,600	2,592	1,693	355	206	105	27,549	30,400	28,639	n.y.a.

(a) Includes wine cocktails, marsala, aperitif and tonic wines. (b) Quantities on which excise duty was paid.

TABLE 2. DOMESTIC SALES OF AUSTRALIAN FORTIFIED AND SPARKLING WINE AND VERMOUTH BY WINEMAKERS
(('000 litres)

Period	Fortified wine						Sparkling wine(a)		Vermouth	
	Sherry		Dessert wine				Bottle fermen- tation	Bulk fermen- tation		
	Dry	Medium	Sweet	Port	Muscat	Other				
		(b)					(c)			
1991-92	2,281	2,938	7,173	15,933	1,438	128	25,406	4,747	644	766
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	4,238	564	694
1992-93—										
April	164	205	548	1,271	125	15	1,781	340	56	56
May	214	258	660	1,418	100	11	1,497	351	28	43
June	230	273	702	1,674	125	12	1,240	275	39	45
1993-94—										
July	191	240	667	1,663	146	16	1,737	311	58	64
August	168	195	558	1,575	117	14	2,429	366	35	31
September	138	184	524	1,189	89	9	1,421	328	50	52
October	166	160	380	982	76	9	2,975	364	n.p.	n.p.
November	170	218	568	1,443	116	11	3,676	551	65	63
December	159	234	553	1,683	111	14	5,718	692	n.p.	n.p.
January	99	99	304	599	47	6	1,038	159	n.p.	n.p.
February	101	151	384	864	63	6	1,650	318	n.p.	n.p.
March	171	179	492	1,027	85	10	1,446	274	44	67
April	176	251	671	1,439	114	8	1,430	294	31	35
May	159	185	476	1,425	100	10	1,387	287	40	43
June	190	222	558	1,493	117	11	1,399	294	48	57

(a) Spritzig table wines are included with table wine. (b) Includes semi-sweet and medium dry. (c) Includes madeira, tokay, white port.

TABLE 3. DOMESTIC SALES OF AUSTRALIAN TABLE WINE BY CONTAINER TYPE
(*000 litres)

Period	WHITE WINE NOT EXCEEDING 1 DEGREE BAUMÉ(a)					WHITE WINE EXCEEDING 1 DEGREE BAUMÉ(a)				
	Glass containers					Glass containers				
	1 litre and under	Over 1 litre	Soft pack(b)	Bulk(c)	Total	1 litre and under	Over 1 litre	Soft pack(b)	Bulk(c)	Total
1991-92	40,736	1,627	122,410	6,690	171,463	2,725	203	15,721	80	18,729
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
1992-93—										
April	3,688	104	10,436	390	14,618	242	17	1,673	4	1,936
May	3,136	91	9,767	389	13,383	185	n.p.	1,416	n.p.	1,619
June	2,824	103	9,089	395	12,411	175	n.p.	1,486	n.p.	1,685
1993-94—										
July	3,644	107	10,710	355	14,817	252	n.p.	1,748	n.p.	2,017
August	4,694	107	10,586	587	15,974	319	n.p.	1,890	n.p.	2,261
September	2,914	86	8,437	476	11,913	202	n.p.	1,376	n.p.	1,597
October	3,686	99	11,080	392	15,256	254	n.p.	1,926	n.p.	2,196
November	4,358	94	11,865	671	16,987	336	n.p.	2,169	n.p.	2,526
December	5,587	118	12,062	774	18,542	431	n.p.	2,204	n.p.	2,668
January	2,269	69	4,949	377	7,664	150	n.p.	911	n.p.	1,074
February	3,685	92	9,271	405	13,453	280	n.p.	1,523	n.p.	1,820
March	3,754	92	9,670	480	13,995	187	12	1,138	3	1,339
April	3,708	94	9,658	250	13,709	279	n.p.	2,257	n.p.	2,557
May	3,210	86	8,722	169	12,186	193	n.p.	1,680	n.p.	1,891
June	3,517	103	10,161	209	13,990	227	19	1,769	4	2,019

For footnotes see end of table.

TABLE 3. DOMESTIC SALES OF AUSTRALIAN TABLE WINE BY CONTAINER TYPE - continued
(*000 litres)

Period	RED					ROSÉ				
	Glass containers					Glass containers				
	1 litre and under	Over 1 litre	Soft pack(b)	Bulk(c)	Total	1 litre and under	Over 1 litre	Soft pack(b)	Bulk(c)	Total
1991-92	24,048	521	25,200	1,021	50,790	763	137	4,792	30	5,722
1992-93	25,268	464	28,677	642	55,051	n.p.	118	4,107	n.p.	4,852
1993-94	27,575	484	28,399	942	57,399	578	n.p.	4,178	n.p.	4,888
1992-93—										
April	2,257	38	2,559	86	4,940	45	9	346	1	401
May	2,255	34	2,572	69	4,930	41	n.p.	334	n.p.	387
June	2,255	44	2,822	83	5,204	n.p.	n.p.	332	n.p.	388
1993-94—										
July	3,057	42	3,143	57	6,299	57	9	432	1	499
August	3,330	53	3,037	102	6,522	54	n.p.	376	n.p.	443
September	1,896	30	2,364	117	4,407	46	n.p.	307	n.p.	365
October	2,096	29	2,643	107	4,875	52	n.p.	424	n.p.	485
November	2,374	38	2,768	90	5,270	48	n.p.	449	n.p.	506
December	2,535	45	2,748	115	5,443	77	n.p.	371	n.p.	467
January	1,041	18	899	55	2,013	30	n.p.	139	n.p.	175
February	1,728	26	1,397	121	3,272	35	n.p.	246	n.p.	290
March	2,201	76	1,416	57	3,749	42	n.p.	281	n.p.	333
April	2,455	35	2,184	33	4,706	48	n.p.	389	n.p.	445
May	2,204	44	2,410	30	4,688	44	n.p.	391	n.p.	445
June	2,660	47	3,391	59	6,157	45	n.p.	374	n.p.	434

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

**TABLE 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
	'000L	'000L	'000L	'000L	'000L	\$'000	'000L at	\$'000
IMPORTS CLEARED								
1990-91	5,604	191	2,285	919	8,999	46,779	636	6,711
1991-92	5,190	160	2,373	979	8,703	45,649	662	7,315
1992-93	4,710	106	2,346	669	7,832	46,984	629	8,085
<i>1992-93—</i>								
March	303	4	100	90	497	2,895	50	661
April	466	9	82	77	635	2,494	24	307
May	368	7	130	51	556	3,679	56	723
June	312	7	188	21	528	2,704	64	562
<i>1993-94—</i>								
July	456	10	220	83	769	4,380	46	828
August	462	13	194	147	816	3,573	47	644
September	404	8	235	165	811	4,744	61	818
October	350	5	215	160	730	4,709	55	630
November	476	13	334	187	1,009	6,268	60	917
December	342	8	303	181	833	5,687	101	1,306
January	182	25	118	80	404	2,741	43	551
February	250	14	224	60	549	2,977	49	507
March	293	7	106	97	502	2,798	42	543
April	301	10	123	105	539	2,317	40	400
May	307	15	115	95	532	2,995	47	548
<i>1992-93—</i>								
July to May	4,399	99	2,158	648	7,304	44,280	565	7,523
<i>1993-94—</i>								
July to May	3,822	127	2,186	1,359	7,495	43,190	589	7,693
EXPORTS (a)								
1990-91	46,890	2,765	3,180	1,321	54,156	179,588	39	794
1991-92	71,752	2,384	3,904	639	78,679	243,526	74	960
1992-93	95,468	1,851	4,730	784	102,832	293,157	73	850
<i>1992-93—</i>								
March	8,908	198	386	16	9,508	28,653	11	147
April	8,640	72	288	33	9,033	24,405	6	50
May	11,582	220	525	67	12,394	33,426	1	8
June	10,858	183	508	45	11,593	33,955	4	47
<i>1993-94—</i>								
July	13,018	231	510	46	13,806	38,042	4	43
August	10,620	287	667	26	11,601	32,188	-	9
September	12,317	432	699	86	13,535	43,722	6	38
October	11,952	441	824	319	13,536	38,475	4	29
November	7,671	144	462	82	8,359	22,520	3	71
December	7,688	313	200	136	8,337	23,428	2	35
January	5,866	84	175	30	6,154	16,289	1	56
February	6,741	181	223	18	7,162	22,066	1	6
March	10,342	191	245	33	10,710	31,552	7	128
April	9,765	302	341	35	10,443	33,500	-	5
May	9,622	151	357	45	10,176	31,261	4	84
<i>1992-93—</i>								
July to May	84,610	1,668	4,223	739	91,239	259,202	69	803
<i>1993-94—</i>								
July to May	105,603	2,657	4,703	856	113,819	333,043	33	505

(a) Exports may include sales made by exporters other than winemakers.

TABLE 5. EXPORTS OF AUSTRALIAN WINE BY COUNTRY OF DESTINATION, MAY 1994

Country/Region	Wine type				Total wine	
	Table	Fortified	Sparkling	Other	Quantity	Value
			(Litres)			(\$'000)
Fiji	57,042	1,630	6,662	-	65,334	190
New Zealand	1,979,606	11,284	54,609	16,844	2,062,343	3,398
Papua New Guinea	48,782	1,544	3,816	-	54,142	338
Total Oceania & Antarctica (a)	2,151,187	19,912	67,769	20,558	2,259,426	4,079
Belgium & Luxembourg	103,820	-	-	-	103,820	324
Denmark	13,041	-	-	-	13,041	46
Finland	28,710	-	-	-	28,710	95
Germany	94,716	-	90	-	94,806	408
Ireland	133,560	-	-	-	133,560	523
Netherlands	29,646	-	-	-	29,646	83
Norway	175,320	-	-	-	175,320	368
Sweden	1,363,978	-	-	-	1,363,978	2,263
Switzerland	50,535	576	-	-	51,111	260
United Kingdom	3,594,032	23,880	217,539	1,440	3,836,891	14,181
Total Europe & the CIS (a)	5,594,544	26,361	217,629	2,115	5,840,649	18,569
Oman	17,140	-	180	-	17,320	20
United Arab Emirates	49,882	1,198	1,899	-	52,979	90
Total Middle East & North Africa (a)	84,422	1,198	2,079	-	87,699	131
Indonesia	23,252	-	855	-	24,107	57
Singapore	78,338	2,160	1,919	9,000	91,417	334
Thailand	41,001	-	720	-	41,721	113
Total Southeast Asia (a)	151,081	2,160	4,007	9,000	166,248	548
Hong Kong	48,574	1,787	45,676	386	96,423	377
Japan	192,929	2,115	4,080	11,610	210,734	812
Taiwan	16,966	-	-	1,655	18,621	87
Total Northeast Asia (a)	277,221	4,046	49,756	13,681	344,704	1,372
Canada	324,720	88,811	1,602	-	415,133	1,388
USA	1,027,538	7,322	12,312	10	1,047,182	5,134
Total North America (a)	1,352,258	96,133	13,914	10	1,462,315	6,522
Total Other Regions(b)	11,772	1,000	2,340	-	15,112	40
Total All Countries	9,622,485	150,810	357,494	45,364	10,176,153	31,261

(a) Includes other countries as detailed in *Australian Standard Classification of Countries for Social Statistics* (1269.0). (b) Includes ship's stores.

TABLE 6 : EXPORTS OF AUSTRALIAN WINE BY REGION

('000 litres)

Period	Oceania & Antarctica	Europe & the CIS	Middle East	Southeast Asia	Northeast Asia	North America	Other	Total all Regions
1990-91	8,830	29,509	666	1,264	3,385	10,232	270	54,156
1991-92	7,509	50,824	855	1,601	3,450	14,153	288	78,679
1992-93	18,251	61,623	799	1,969	3,483	16,356	351	102,832
1992-93—								
March	1,280	5,653	130	228	291	1,853	72	9,508
April	1,881	5,209	46	157	222	1,508	10	9,033
May	2,542	7,749	98	237	283	1,461	24	12,394
June	2,355	7,256	65	129	220	1,555	12	11,593
1993-94—								
July	2,907	7,662	111	195	481	2,438	12	13,806
August	2,171	7,220	80	131	578	1,405	15	11,601
September	1,980	8,624	111	156	468	2,151	45	13,535
October	3,067	7,735	63	328	628	1,667	47	13,536
November	2,065	4,417	65	147	332	1,265	67	8,359
December	2,335	3,821	49	248	607	1,252	25	8,337
January	1,281	3,722	56	80	223	776	15	6,154
February	r1,419	r3,760	95	148	309	r1,405	26	r7,162
March	r1,651	r6,935	67	188	365	r1,477	26	r10,710
April	r2,546	r5,930	89	r139	r273	1,442	25	r10,443
May	2,259	5,841	88	166	345	1,462	15	10,176
1992-93—								
July-May	15,896	54,367	734	1,840	3,262	14,801	339	91,239
1993-94—								
July-May	23,683	65,666	875	1,927	4,610	16,741	317	113,819

EXPLANATORY NOTES

Introduction

The information shown in this publication for wine sales 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 exports and import clearances are based on information provided to the Australian Customs Service by importers, exporters and their agents.

Scope and coverage

2. The information on wine is obtained from winemaking enterprises with wine sales of 250,000 litres or more in the previous financial year. These account for approximately 97 per cent of total wine sales.

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.

5. Commencing with April 1992, the timing basis for the compilation of merchandise exports statistics has been changed. The change involves compiling exports statistics on the basis of goods shipped in any period rather than the basis of the documentation of goods shipped in that or earlier periods. In the past only about half of shipments were recorded in the month of shipment, the remainder recorded in subsequent months. The effect of the change is significant on monthly data but marginal on annual data.

For more information about the changed basis of compilation refer to publication *Foreign Trade Australia: Merchandise Exports, April 1992*. (5432.0)

6. All sales data are collected on an Australia-wide basis only and State figures are therefore not available.

7. The wine content of products consisting of a mixture of wine and fruit juice, commonly known as 'coolers', is included in the appropriate category of wine from which it is made, which is generally table wine. Where a wine is categorised by container type (i.e. table wine) the wine content of 'coolers' is included in the 'bulk' figure.

Seasonally adjusted and trend estimates

8. 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).

9. 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.

10. While this smoothing technique enables estimates of trend to be produced for the latest month, it does result in revisions to the estimates for the most recent months as data for subsequent months become available. Generally subsequent revisions become smaller and after 3 months have a negligible impact on the series. There will also be revisions as a result of revisions to the original series and periodic reviews of seasonal factors. The latest review, in September 1993, revised seasonally adjusted and trend monthly series back to July 1975.

11. Users may wish to refer to the ABS Information Papers *A Guide to Smoothing Time Series - Estimates of 'Trend'* (1316.0) and *Time Series Decomposition - An Overview* (1317.0) for more detailed information on smoothing of seasonally adjusted time series data.

12. Care should be exercised when interpreting year-to-date figures as measures of trend growth. Due to their temporal phase-shifting properties, year-to-date measures are not always useful for detecting turning points in the data. In particular, these measures are not responsive to more recent trend changes and can be indicative of more historical growth patterns. A further deficiency is that with each additional month of data, the extent of smoothing implicit in the year-to-date measure varies, giving for each month a different form of trend estimate. That is, the degree of smoothing after 3 months will be different to that achieved with 10 months of data. It is possible that the year-to-date measure will suggest results that do not accord with the ABS trend estimate, which is a much more timely indicator of recent trend behaviour.

Related publications

13. Other ABS publications which may be of interest include:

Manufacturing Production, Australia, Food, Drink, Tobacco, Stock and Poultry Food (8359.0) - issued monthly, contains production statistics for wine based mixed drinks ('coolers').

Wine Production: Australia and States (8366.0) - includes stocks of Australian wine and brandy held by winemakers.

14. 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 *Publications Advice* (1105.0) which lists publications to be released in the next few days. The Catalogue and Publications Advice are available from any ABS office.

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- .. not applicable

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

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