

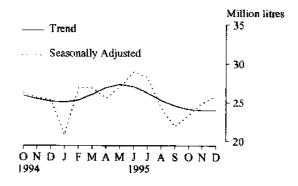


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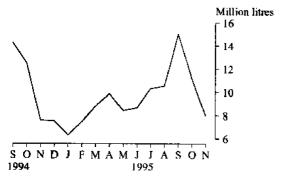
SALES OF AUSTRALIAN WINE AND BRANDY BY WINEMAKERS, DECEMBER 1995

SUMMARY OF FINDINGS

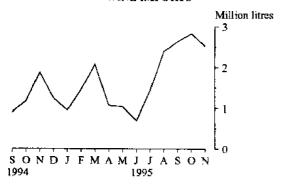
DOMESTIC SALES OF AUSTRALIAN PRODUCED WINE



EXPORTS OF AUSTRALIAN PRODUCED WINE



WINE IMPORTS



Domestic sales

The trend estimate for the total domestic sales of Australian produced wine rose by 0.1% in December. This flattening of the sales trend follows a period of decline which commenced in June 1995.

The seasonally adjusted estimate of total domestic sales of Australian wine for the month was 25.8 million litres, an increase of 3.5% on the previous month. This increase was sufficient to arrest the decline in the trend series. It would require a fall in the seasonally adjusted estimate next month of around 14% to recommence a decline in the trend series.

In original terms, there were 36.6 million litres of Australian produced wine sold domestically during December, an increase of 21.6% on November, continuing the build up for the Christmas/New Year break. There were 305.9 million litres of Australian produced wine sold domestically in 1995, a 2.4% decrease on sales in 1994.

Exports

A total of 8.0 million litres of Australian wine valued at \$27.5 million were exported in November. This quantity is 28.7% less than exports in October but 4.7% more than in November 1994.

For the five months to November, 55.0 million litres valued at \$195.4 million were exported, 2.7% less quantity but 4.8% more in value than for the corresponding period in 1994.

Imports

Australia imported 2.5 million litres of wine in November at a cost of \$8.1 million. This was the highest value of imported wine since November 1994. Table wine represented 72.2% of the total imports for November.

Imports for the five months to November were 113.2% greater in quantity and 17.8% higher in value compared with the corresponding period in 1994.

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.

	3 months ende	ed December		
Table wine	1994	1995	% change	
	'000 L	'000 L		
White – bottles 1 litre and under	16,008	15,814	-1.2	
White other containers	38,838	35,000	-9.9	
Total white	54,847	50,814	-7.4	
Red – bottles 1 litre and under	7,404	8,449	14.1	
Red – other containers	8,000	8,173	2.2	
Total red	15,404	16,622	7.9	
Total table wine (includes Rosé)	71,605	68,796	-3.9	

Australian produced white table wine sales fell by 7.4% largely due to a 9.9% fall in other containers while red table wine rose by 7.9% mainly as a result of a 14.1% rise in bottle sales. Total Australian table wine sales decreased by 3.9%.

The volume of wine sales reported does not include any quantity of imported wine that may have been blended with the Australian product (this particularly applied to cask containers). The increasing influence of imported wine is evident in the following table.

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
1992-93	312,081	7,832	319,913
1993-94	319,534	8,341	327,875
1994-95	313,357	14,057	327,413
1994			
3 months ended November	87,396	3,956	91,352
1995			
3 months ended November	76,411	7,973	84,384

There was a decrease of 7.6% in the wine available for consumption for the three months to November 1995 compared with the same period in 1994. During these same periods there was a fall of 12.6% in the domestic sales of Australian produced wine which was partly offset by the rise of 101.5% in imports cleared for home consumption.

Disposals of Australian produced wine, original data.

Period	Domestic sales of Australian produced wine	Exports of Australian produced wine	Total disposais
	'000 L	900 L	7000 L
1992-93	312,081	102,832	414,913
1993-94	319,534	125,464	444,998
1 99495	313,357	113,655	427,012
1994			
3 months ended November	87,396	34,374	121,770
1995			
3 months ended November	76,411	34,179	110,590

There was a fall of almost 18 million litres (or 4.0%) in the disposal of Australian produced wine in 1994–95 when compared with the previous financial year. Exports fell by 9.4% and contributed two-thirds of the total fall in disposals. However, in the three months to November, exports fell by less than 1% when compared with the same period in 1994.

While the amount of Australian produced wine available for disposal is affected by previous vintages and movement in stocks, domestic demand is met in part with imports, while substantial quantities of Australian wine are exported. There appears to be a move to maintain exports of Australian wine and fill the gap in the domestic demand with imported product.

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

			(Wind	type						
		······						Total wine		
Period	Table	Fortified	Spark-	Carbon-	Flavoured	V 0		Seasonally	Trend	
	1 4016	rorigiea	ling	ated	(a)	Vermouth	Original	adjusted	estimate	Brandy(b)
				ļ	('000 litres)					('000L al)
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			1,301
1994-95—										
October	21,295	2,016	3,285	326	212	104	2 7 ,238	26,298	25,890	115
November	23,700	2,799	3,629	441	235	110	30,914	25,589	25,501	115
December	26,610	2,467	5,899	571	213	138	35,899	25,320	25,361	127
January	10,995	1,153	970	144	109	105	13,476	20,766	25,103	111
February	19,208	1,482	1,302	238	114	82	22,425	26,921	25,043	89
March	19,996	1,818	1,798	239	159	99	24,109	26,840	26,053	96
April	19,863	2.262	1,763	162	177	81	24,309	25,559	26,033	87
May	20,150	2,612	1,571	221	225	67	24,846	26,989	20,911	84
June	23,192	2,967	1,589	319	217	99	28,382	28,968	r27,047	98 1 0 2
1995-96—									,	
July	26,697	3,179	1,959	241	249	83	32,409	28,296	r26,236	118
August	18,405	2,292	1,818	253	146	67	22,982	24,291	r25,294	117
September	17,434	1,613	2,708	265	123	76	22,219	21,882	τ24.549	64
October	18,600	1,806	3,214	234	213	69	24,137	23,325	r24,100	94
November	22,927	2,476	3,935	335	223	160	30,055	24,947	г23,953	104
December	27,269	2,588	5,888	468	220	126	36,559	25,812	23,976	п.у.а.
1994-95—										,
July to December 1995-96 —	138,187	14,706	19,008	2,111	1,219	585	175,811	*4	**	544
July to December	131,333	13,954	19,521	1,796	1,175	581	168,361	**		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)

				(000	uu eaj					
		т.	Fort	ified wine			Sparkling	g wine(a)		
		Sherry			Dessert wine		Bottle	Bulk		
		Medium			<u> </u>	Other	fermen-	fermen-	Verm	outh
Period	Dry	(Б)	Sweet	Port	Muscat	(c)	tation	tation	Dry	Sweet
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—										
October	149	187	446	1,131	89	14	2,815	470		
November	204	236	614	1,630	102	13	3,140	490	n.p.	n.p.
December	156	202	502	1,482	105	18	5,157	743	50	60
January	70	133	251	642	46	11	774		n.p.	np.
February	138	154	388	724	66	11	1,033	196	n.p.	n.p.
March	123	149	425	1,063	56	3	1,453	269	33	49
April	144	185	482	1,346	88	17	1,480	345	44	55
Mey	178	229	576	1,516	99	15	1,460	283 294	38	43
June	186	223	615	1,805	123	15	1,307	29 4 281	26 44	41 56
1995-96 <u> </u>									.,	
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	26 35	42
October	140	154	419	1,003	81	8	2,454	760	30	42 39
November	159	224	583	1,397	102	11	3,012	923		
December	166	211	522	1,586	92	11	4,503	1.385	n.p. n.p.	п.р. п.р.
1994-95							•	•		p.
July to December 1995-96—	994	1,256	3,211	8,539	626	79	16,306	2,704	n.p.	n.p.
July to December	1,015	1,284	3,003	8,045	551	56	15,052	4,469	258	323

⁽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)

	WHITE W	INE NOT E	XCEEDING	DEGREE B	AUMÉ(a)	WHITE W	'INE EXCE	EDING 1 DEC	GREE BAUM	ſÉ(a)
	Glass con	tainers				Glass co	ntainers			
Period	litre and under	Over 1 litre	Soft pack(b)	Bulk(c)	Total	l litre and under	Over I litre	Soft pack(b)	Bulk(c)	Total
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—										
October	4,360	80	9,142	411	13,993	254	n.p.	1,508	n.p.	1,779
November	5,043	90	10,292	595	16,020	275	11	1,812	9	2,108
December	5,681	111	11,997	687	18,477	394	n.p.	2,043	n.p.	2,470
January	2,324	68	4,893	301	7,586	159	29	890	7	1,085
February	3,775	82	9,603	234	13.693	230	n.p.	1,512	n.p.	1,758
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
1994-95								40.705		
July to December	26,750	537	58,761	2,422	88,470	1,612	n.p.	10,398	n.p.	12,145
1995-96—	26.000	204	54 73 1	1 970	93.046	1.451	n r	0 271	n n	10,963
July to December	26,088	397	54,721	1,839	83,046	1,451	n.p.	9,371	n.p.	10,96

For footnotes see end of table.

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

				(*000	litres)					
			RED	_				ROS	SÉ .	
	Glass con	tainers		,··		Glass co	ntainers			
	1 litre					I litre				
	and	Over	Soft			and	Over	Soft		
Period	under	I litre	pack(b)	Bulk(c)	Total	under	1 litre	pack(b)	Bulk(c)	Total
1992-93	25,268	464	28,677	642	55,051	n.p.	118	4,107	п.р.	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										
October	2,195	61	2,797	53	5,107	51	n.p.	356	n.p.	417
November	2,556	50	2,482	61	5,149	63	n.p.	349	n.p.	423
December	2,653	54	2,409	32	5,149	84	n.p.	418	n.p.	514
Jamuary	1,153	21	940	13	2,128	30	n.p.	156	п.р.	197
February	1,718	36	1,634	26	3.414	39	n.p.	294	n.p.	343
March	2,428	35	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	4]	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	п.р.	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	п.р.	603
1994-95										2 /2
July to December	16,285	310	17,970	364	34,931	336	n.p.	2,237	n.p.	2,637
1995-96								2.205		0.00
July to December	17,727	260	16,460	195	34,642	n.p.	55	2,306	n.p.	2,682

⁽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

			e type		-	wine	Brandy		
Period	Table	Fortified	Sparkling	Other	Quantity	Value	Quantity	Value	
	.000L	'000L	.000L	J000L		\$'000	'000L al	\$ 1000	
			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—									
September	533	9	133	223	898	4,065	48	568	
October	692	58	281	150	1.182	5,742	56	615	
November	1,134	38	601	104	1,876	8,738	69	790	
December	642	49	356	199	1.246	7,384	76	1,043	
fanuary	663	20	212	55	951	4,508	36	564	
February	1.109	4	267	81	1,461	4,256	44	563	
March	1,780	9	216	68	2,072	4,482	32	420	
April	669	10	323	65	1,066	5,417	34	412	
May	796	17	149	71	1,034	4,673	52	570	
lune	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	6,228	44	651	
October	2,349	23	419	36	2,827	7,432	43	618	
November	1,820	14	568	117	2,519	8,135	68	786	
100.4.05									
1994-95—	2 242	162	1 439	704	£ 520	36.440	205	2 022	
July to November	3,243	153	1,438	704	5,539	26,440	285	3,233	
1995-96 July to November	9,777	53	1,564	416	11,810	31,138	252	3,286	
			FXPC	RTS(a)					
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	105,534	2,475	5,109	537	113,655	385,652	36	812	
1994-95—									
September	13,383	181	654	47	14,265	47,046	5	108	
October	11,162	368	934	27	12,492	42,852	4	62	
November	7,102	115	354	46	7,617	26,659	1	36	
December	7,026	247	269	23	7,565	23,606	7	106	
January	5,881	73	343	34	6,332	18,627	<u>-</u>	2	
February	6,906	219	328	27	7,480	25,408	3	47	
March	8,324	137	294	33	8,789	32,210	3	104	
April	9,131	171	508	71	9,882	35,723	3	46	
May	7,873	137	382	41	8,432	31,202	5	102	
June	8,046	171	350	96	8,663	32,465	-	16	
1995-96									
July	г9,586	159	528	44	10,316	r39,018	3	102	
Augest	r9,777	280	403	53	r10,513	r36,616	3	73	
September	r14,021	233	719	r56	r15,028	r51,373	2	26	
October	r10,246	τ311	r552	68	r11,177	r40,906	-	8	
November	7,320	187	398	69	7,974	27,498	2	58	
1994-95— July to November	52,346	1,319	2,634	212	56,511	186,410	15	390	
1995-96									
July to November	50,950	1,170	2,601	289	55,009	195,412	9	268	

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

TABLE 5. EXPORTS OF AUSTRALIAN WINE BY COUNTRY OF DESTINATION, NOVEMBER 1995

		W.	ine type		Total wine	
Country/Region	Table	Fortified	Sparkling	Other	Quantity	Value
			(Litres)			(\$'000)
Fiji	57.377	4,000	6,210	-	67,587	220
New Zealand	1,599,134	76,033	147,204	17,424	1.839,795	3,631
Vanuatu	27,056	828	648	-	28.532	62
Total Oceania & Antarctica (a)	1,727,221	84,080	160,788	17,514	1,989,603	4.096
Denmark	73,494	-	-	-	73,494	289
Finland	41,310	•	8,118	-	49,428	190
Germany	168,569	9,400		99	178,068	695
Ireland	247,998	180	3.600	-	251,778	1,006
Netherlands	224,983	-	63	-	225,046	930
Norway	96,738	-	-	-	96,738	316
Sweden	241,214	-	-	-	241,214	875
Switzerland	114,392	-	-	-	114,392	417
United Kingdom	2,581,263	18,850	139,795	8,766	2,748,674	9,399
Total Europe & the Former USSR (a)	3,824,044	28,430	151,576	9,315	4,013,365	14,300
Bahrain	16,160	-	765	-	16,925	25
United Arab Emirates	59,093	2,420	12,915	1,170	75,598	198
Total Middle East & North Africa (a)	75,2532	2,420	13,680	1,179	92,532	224
Indonesia	47,273	-	162	13,474	60.909	157
Singapore	173,170	594	9,544	3,238	186,546	774
Thailand	108,085	-	737	351	109,173	422
Total Southeast Asia (a)	370,740	594	16,416	18,485	406,235	1,600
Hong Kong	103,563	4,115	17,396	5,698	130,772	723
Japan	124,043	53,658	10,916	7,641	196,258	714
Republic of Korea	21,348	•	8,550	-	29,898	73
Total Northeast Asia (a)	273,557	57,773	36,862	13,339	381,531	1,585
Canada	207,755	90	12,960	7.431	228.236	1,089
USA	831,233	10,755	5,301	1,313	848,602	4,527
Total Northern America (a)	1,038,988	10,845	18,261	8,744	1,076,838	5,616
Total Other Regions(b)	10,276	3,070	348	-	13,994	77
Total All Countries	7,320,079	187,21 2	398,231	68,576	7,974,098	27,498

⁽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(a)
('000 ltres)

		Europe &	Middle				<u></u>	
	Oceania &	the Former	East &	Southeast	Northeast	Northern		Total al
Pertod	Antarctica	USSR	North Africa	Asia	Asia	America	Other	Regions
1992-93	18,251	61,623	799	1,969	3,483	16,356	351	102,833
1993-94	24,968	73,334	952	2,134	5,268	18,463	346	125,464
1994-95	17,144	69,775	1.014	2,196	4,307	18,786	434	113,655
1 994-95								
September	2,185	10,009	37	146	293	1,577	19	14,265
October	1,978	7,389	71	352	616	2,030	57	12,492
November	1,537	3,285	80	280	658	1,651	124	7,617
December	1,530	3,959	73	236	396	1,362	9	7,565
January	1,366	3,636	55	106	262	905	2	6,332
February	1,602	4,002	62	200	277	1,303	35	7,480
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	5,235	141	251	212	1,743	36	8,432
June	945	5,415	88	144	253	1,780	39	8,663
1995-96—								
July	1,209	6,428	92	226	544	1,807	10	10.316
August	rl,387	6,568	_	157	219	2,163	19	r10,513
September	r1,803	r10,334	154	r246	330	т2,154	r7	r15,028
October	820	r7,926	20	r188	г429	£1,752	r43	rl 1,177
November	1,990	4,013	93	406	382	1,077	14	7.974
1994-95								
July-November	9,164	35,017	385	977	2,193	8,530	244	56,511
1995-96—								
July-November	7,209	35,270	359	1,223	1,903	8,952	93	55,009
(a)Exports may inc	sales made by	orters other	nemakers.					

EXPLANATORY NOTES

INTRODUCTION

SCOPE AND COVERAGE

- 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 exports and import clearances are based on information provided to the Australian Customs Service by importers, exporters and their agents.
- 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.

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

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



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