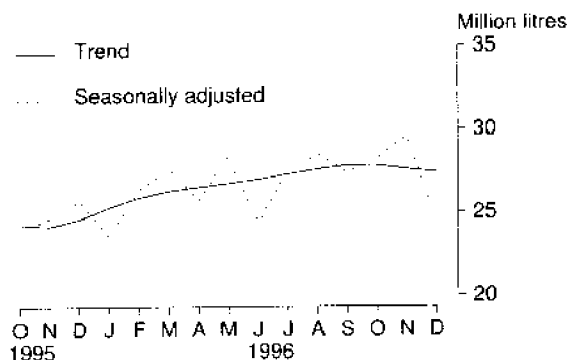


SALES OF AUSTRALIAN WINE AND BRANDY BY WINEMAKERS, DECEMBER 1996

SUMMARY OF FINDINGS

DOMESTIC SALES OF AUSTRALIAN PRODUCED WINE



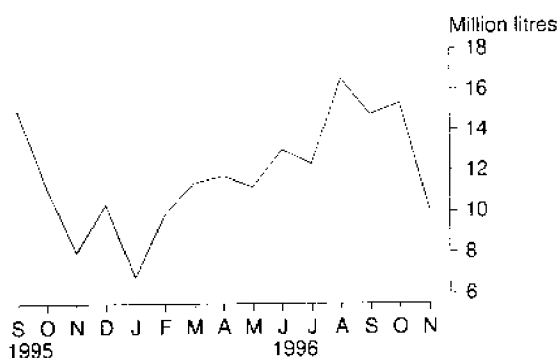
DOMESTIC SALES

The trend estimate for the total domestic sales of Australian produced wine fell by 0.6% in December. This was the third month of decline in the trend series following 10 months of growth.

The seasonally adjusted estimate of total domestic sales of Australian produced wine for the month was 24.5 million litres, a fall of 17.6% on the previous month. The seasonally adjusted estimate would need to increase by 25% or more in January 1997 for the trend growth to resume.

In original terms, there were 34.6 million litres of Australian produced wine sold domestically during December, down 2.9% on November 1996 and down 5.8% on December 1995. There were 323.3 million litres of Australian produced wine sold domestically in 1996, a 5.0% increase on sales in 1995.

EXPORTS OF AUSTRALIAN PRODUCED WINE

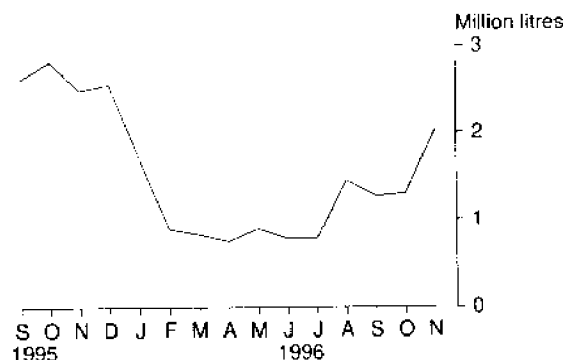


EXPORTS

A total of 10.1 million litres of Australian wine valued at \$39.7 million were exported in November. This quantity is 34.2% less than October but 26.2% more than November 1995. The exports were valued at \$18.8 million less than October but \$12.0 million more than in November 1995.

Of the November exports, the United Kingdom received 42.8%, New Zealand 17.1% and the United States of America 13.0%.

WINE IMPORTS CLEARED FOR HOME CONSUMPTION



IMPORTS CLEARED FOR HOME CONSUMPTION

Australia cleared 2.0 million litres of imported wine for home consumption in November, up 56.5% on October but down 18.5% on November 1995. The majority of imports cleared for November were for table wine (77.3%) while sparkling wine accounted for 17.4%.

The average price per litre of wine imports cleared for home consumption was \$3.97 compared with \$5.50 in October and \$3.25 in November 1995.

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 December		% change
	1995	1996	
	'000 L	'000 L	
White — bottles 1 litre and under	15 639	16 469	5.3
White — other containers	35 603	37 776	6.1
<i>Total white</i>	51 242	54 245	5.9
Red — bottles 1 litre and under	8 320	10 254	23.2
Red — other containers	8 222	9 974	21.3
<i>Total red</i>	16 542	20 228	22.3
Total table wine (includes Rosé)	69 135	75 826	9.7

Total sales of Australian produced table wine rose by 9.7% in the past 3 months compared with the same period 12 months ago. Red table wine sales rose by 22.3% with a 23.2% rise in bottle sales and a 21.3% rise in sales of other containers (mostly soft packs). White table wine sales rose by 5.9% with bottles up 5.3% and other containers up 6.1%.

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
1995			
3 months ended November	76 956	7 952	84 908
1996			
3 months ended November	91 441	4 602	96 043

There was an increase of 11.1 million litres or 13.1% in the wine available for consumption for the 3 months to November compared with the same period in 1995. The decrease of 3.4 million litres in imports was more than offset by the increase of 14.5 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	129 628	439 090
1995			
3 months ended November	76 956	34 263	111 219
1996			
3 months ended November	91 441	40 295	131 736

There was an increase of 20.5 million litres or 18.4% in the disposal of Australian produced wine for the 3 months to November 1996 compared with the same period in 1995. This increase is a result of a rise of 14.5 million litres (18.8%) in the domestic sales of Australian produced wine combined with a rise of 6.0 million litres (17.6%) in exports.

1

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
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—										
October	19 012	1 806	3 214	234	213	69	24 548	24 024	24 369	94
November	22 745	2 473	3 983	335	223	160	29 918	24 703	24 209	104
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	27 313	109
August	22 614	2 160	2 254	199	205	71	27 503	28 495	27 610	104
September	21 690	1 872	3 059	322	152	64	27 159	27 415	27 826	66
October	22 193	2 119	3 777	335	178	86	28 688	28 237	27 824	n.y.a.
November	27 834	2 357	4 618	453	215	117	35 594	29 663	27 612	n.y.a.
December	25 798	2 376	5 537	512	208	121	34 551	24 454	27 437	n.y.a.

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.

2

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	Sweet	Port	Muscat	Other ³				
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—										
October	140	154	419	1 003	81	8	2 454	760	30	39
November	159	224	582	1 395	102	11	3 059	923	n.p.	n.p.
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

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
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—										
October	4 135	62	8 016	245	12 458	209	n.p.	1 389	n.p.	1 616
November	4 811	74	9 629	284	14 796	230	n.p.	1 675	n.p.	1 927
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
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
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—										
October	2 485	42	2 057	21	4 604	46	n.p.	279	n.p.	334
November	2 816	39	2 740	13	5 608	n.p.	7	351	n.p.	414
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

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 CLEARED ¹								
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—								
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
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	1 266	10	96	80	1 452	5 796	58	727
September	917	22	228	98	1 265	6 121	50	562
October	746	19	322	214	1 301	7 152	52	r716
November	1 573	8	354	100	2 036	8 074	70	905
EXPORTS ²								
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 004	2 506	5 480	638	r129 628	r471 294	23	729
1995-96—								
September	14 023	233	719	56	15 031	51 391	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	9 768	170	396	38	10 373	40 613	3	83
January	6 237	262	254	37	6 790	26 579	3	60
February	r9 189	154	491	44	r9 879	r34 900	1	62
March	10 585	326	456	63	11 430	42 324	1	62
April	11 176	121	390	43	11 730	41 217	—	7
May	10 709	139	337	60	11 245	41 679	2	95
June	12 307	164	537	63	13 071	48 091	4	67
1996-97—								
July	r11 596	174	522	51	12 343	r45 128	—	18
August	r15 364	387	756	66	r16 573	r62 326	3	79
September	r13 696	269	750	72	r14 787	r54 715	4	89
October	r14 001	311	r954	r122	r15 388	r58 578	2	64
November	9 428	92	552	49	10 120	39 744	2	51

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.

5

EXPORTS OF AUSTRALIAN WINE BY COUNTRY OF DESTINATION, NOVEMBER 1996

Country/region	Wine type				Total wine	
	Table	Fortified	Sparkling	Other	Quantity	Value
	litres	litres	litres	litres	litres	\$'000
Fiji	45 096	899	11 486	—	57 481	309
New Caledonia	44 649	6 750	1 000	—	52 399	98
New Zealand	1 553 795	12 767	152 420	14 360	1 733 342	4 002
Total Oceania & Antarctica¹	1 708 666	21 061	171 462	14 360	1 915 549	4 646
Denmark	142 836	—	—	—	142 836	459
Germany, Federal Republic of	151 113	—	—	—	151 113	566
Ireland	130 346	1 152	450	—	131 948	712
Netherlands	168 385	—	4 905	—	173 290	612
Norway	87 372	—	27	—	87 399	242
Sweden	262 117	—	—	—	262 117	876
Switzerland	133 438	—	675	9 150	143 263	690
United Kingdom	4 041 490	21 682	261 624	6 561	4 331 357	16 978
Total Europe & The CIS¹	5 313 732	22 834	268 248	15 711	5 620 525	21 846
Oman	18 072	—	270	—	18 342	24
United Arab Emirates	49 561	801	9 450	—	59 812	148
Total Middle East¹	84 425	801	9 720	—	94 946	202
Singapore	121 992	1 260	11 320	1 487	136 059	816
Thailand	176 491	45	22 500	—	199 036	692
Total Southeast Asia¹	374 767	1 305	38 428	1 640	416 140	1 921
Hong Kong	133 378	3 585	25 854	7 113	169 930	1 056
Japan	154 012	—	316	7 921	162 249	888
Total Northeast Asia¹	392 729	6 285	26 170	16 934	442 118	2 556
Canada	265 214	26 691	4 140	—	296 045	1 176
United States of America	1 276 582	5 936	32 761	36	1 315 315	7 310
Total North America¹	1 541 796	32 627	36 901	36	1 611 360	8 486
Total Other Regions²	11 624	6 800	1 008	—	19 432	86
Total All Countries	9 427 739	91 713	551 937	48 681	10 120 070	39 744

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	Oceania and Antarctica	Europe and the Former USSR	Middle East and North Africa	Southeast Asia	Northeast Asia	Northern America	Other	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	125 464
1994-95	17 144	69 782	1 014	2 197	4 307	18 786	434	113 663
1995-96	r14 652	83 825	946	r3 519	r4 445	21 990	251	r129 628
1995-96—								
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	6 686	61	335	371	2 208	4	10 373
January	441	4 582	46	376	238	1 081	25	6 790
February	1 781	5 821	119	r329	410	1 402	16	9 879
March	1 399	6 816	99	339	421	2 319	36	11 430
April	1 238	7 599	100	416	321	2 023	33	11 730
May	937	7 484	125	249	333	2 086	30	11 245
June	934	9 560	33	234	402	1 897	12	13 071
1996-97—								
July	1 698	7 522	117	313	r278	2 377	38	12 343
August	1 542	r11 239	55	296	395	3 022	15	r16 573
September	1 552	r9 447	32	416	386	2 899	55	r14 787
October	r2 119	r9 772	61	r345	r565	r2 499	27	r15 388
November	1 916	5 621	95	416	442	1 611	19	10 120

¹ Exports may include other than wine.

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

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BRISBANE	(07) 3222 6351	(07) 3222 6350
PERTH	(09) 360 5140	(09) 360 5307
ADELAIDE	(08) 8237 7100	(08) 8237 7582
CANBERRA	(06) 252 6627	(06) 207 0326
HOBART	(03) 6220 5800	(03) 6220 5800
DARWIN	(08) 8943 2111	(08) 8943 2111



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