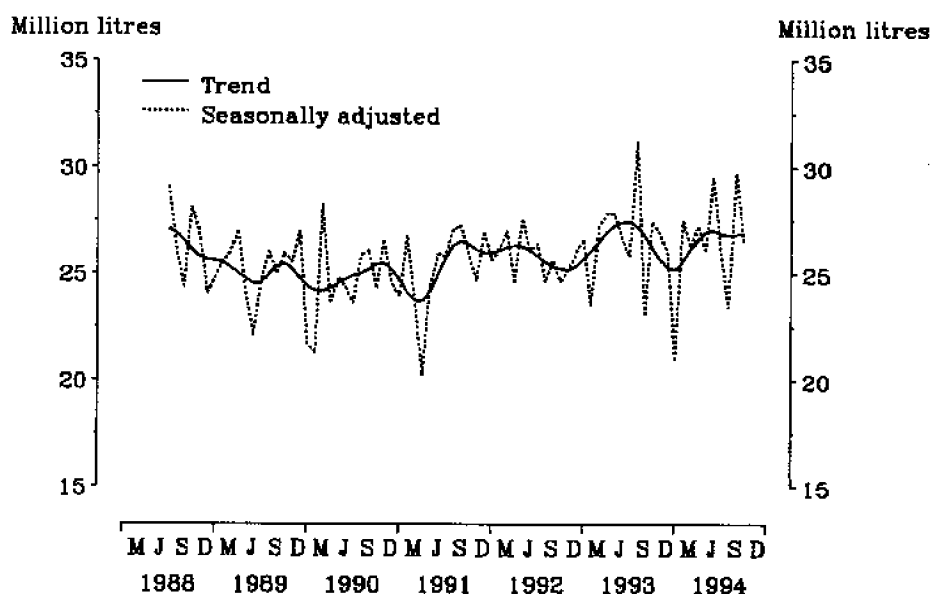


SALES OF AUSTRALIAN WINE AND BRANDY BY WINEMAKERS, OCTOBER 1994

SUMMARY OF FINDINGS

DOMESTIC WINE SALES



Domestic sales

The trend series for total domestic wine sales grew by 0.1 per cent between September and October 1994, following a 0.2 per cent rise between August and September 1994. The trend series has remained basically flat for the last 4 months following a five month period of growth in the first half of the year.

The current trend growth is weak and would require only a 1.2 per cent fall in the seasonally adjusted estimate of wine sales in November 1994 for the trend series to start to decline (the average monthly movement regardless of sign in this series is 7.0 per cent). Readers are reminded that recent trend estimates are provisional and could change when data for future months become available.

In original terms, there were 27.5 million litres sold domestically during October 1994, a 6.8 per cent fall on September 1994. Most of this decrease can be attributed to lower sales in the table and fortified wine types.

Exports

A record monthly total of 13.9 million litres of wine valued at \$45.7 million was exported from Australia in September 1994. While wine exports are traditionally stronger between July and October, the September 1994 exports are 3.0 per cent above those for September 1993.

The increase in wine exports between August and September 1994 was mostly due to the record volume of 9.8 million litres exported to Europe and the CIS. Within this region 80 per cent of wine exported went to the United Kingdom. Australia exported a record 7.8 million litres of wine to the U.K. in September 1994.

In the nine months to September 1994, Australia exported 92.1 million litres of wine, 2.8 per cent or 2.6 million litres less than for the same period to September 1993. However, the value of these exports were up by 4.4 per cent or \$11.9 million.

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- for further information about statistics in this publication and the availability of related unpublished statistics, contact Peter Carmalt on Adelaide (08) 237 7626 or any ABS State Office.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 0.9 million litres of wine in September 1994 at a cost of \$4.1 million.

For the nine months to September 1994, Australia imported 5.9 million litres of wine, 2.6 per cent more than for the same period in 1993. These imports cost \$30.2 million, a fall of 7.9 per cent or \$2.6 million when compared with the same period in 1993.

A comparison of domestic wine sales (original data) for the ten months ended October 1993 and 1994 follows. Care should be exercised when interpreting year-to-date figures as measures of trend growth because year-to-date figures do not accurately reflect changes in trend sales. See paragraph 12 in Explanatory Notes.

<i>Wine type</i>	<i>10 months ended October</i>		<i>Percentage change</i>
	<i>1993</i>	<i>1994</i>	
	<i>'000L</i>	<i>'000L</i>	
Table			
White - bottles 1 litre and under	35,509	38,600	8.7
White - other containers	116,263	108,987	-6.3
<i>Total</i>	<i>151,772</i>	<i>147,587</i>	<i>-2.8</i>
Red - bottles 1 litre and under	21,300	23,489	10.3
Red - other containers	25,248	25,978	2.9
<i>Total</i>	<i>46,548</i>	<i>49,467</i>	<i>6.3</i>
Rose - bottles 1 litre and under	457	433	-5.3
Rose - other containers	3,386	3,389	0.1
<i>Total</i>	<i>3,843</i>	<i>3,822</i>	<i>-0.5</i>
Total table wine	202,163	200,876	-0.6
Fortified	22,092	21,732	-1.6
Sparkling			
Bottle fermented	17,151	16,759	-2.3
Bulk fermented	3,220	3,097	-3.8
<i>Total sparkling wine</i>	<i>20,371</i>	<i>19,856</i>	<i>-2.5</i>
Other	5,461	5,184	-5.1
TOTAL WINE SALES	250,087	247,648	-1.0

For the ten months ended October 1994, domestic sales of Australian wine by winemakers were lower (by 1.0%) on the corresponding period in 1993.

The following highlight major movements within the various wine types:

- White table wine sales were down by 2.8 per cent, with an increase in sales of bottled wine of 8.7 per cent more than offset by a decrease in wine sold in other containers (-6.3%).
- Red table wine sales were up by 6.3 per cent, with an increase in both sales of bottled wine of 10.3 per cent and red wine sold in other containers (2.9%).
- Sparkling wine sales were down by 2.5 per cent.
- Sales of fortified wine fell by 1.6 per cent.

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

Period	Wine type						Total wine			Brandy(b)
	Table	Fortified	Sparkling	Carbonated	Flavoured (a)	Vermouth	Original	Seasonally 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	..	..	1,301
1993-94—										
August	25,198	2,626	2,795	279	270	66	31,234	31,254	27,205	177
September	18,283	2,132	1,749	255	204	102	22,724	23,030	26,745	87
October	22,814	1,772	3,339	253	181	139	28,496	27,466	26,202	87
November	25,291	2,526	4,227	375	312	128	32,857	26,854	25,677	132
December	27,119	2,755	6,410	509	251	154	37,198	25,957	25,270	151
January	10,926	1,154	1,197	153	n.p.	n.p.	13,652	20,937	25,198	72
February	18,836	1,568	1,968	228	n.p.	n.p.	22,784	27,489	25,600	76
March	19,416	1,965	1,720	217	136	111	23,565	26,293	26,165	93
April	21,417	2,659	1,725	268	188	66	26,323	27,266	r26,628	108
May	19,210	2,354	1,674	278	179	84	23,779	26,034	r26,979	93
June	22,600	2,592	1,693	355	206	105	27,549	29,551	r27,025	86
1994-95—										
July	24,403	2,714	2,031	246	195	70	29,660	26,175	r26,876	94
August	19,122	2,294	1,495	185	188	72	23,356	23,401	r26,814	n.y.a.
September	23,500	2,416	2,968	342	176	91	29,492	29,795	r26,855	n.y.a.
October	21,445	2,016	3,385	326	212	104	27,488	26,549	26,883	n.y.a.
1993-94—										
July to October	89,927	9,453	9,931	1,141	931	429	111,810	..	..	490
1994-95—										
July to October	88,470	9,440	9,880	1,099	770	336	109,995	..	..	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 fermentation	Bulk fermentation	Dry	Sweet
	Dry	Medium (b)	Sweet	Port	Muscat	Other (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
1993-94—										
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
1994-95—										
July	168	254	665	1,504	113	9	1,700	331	33	37
August	165	170	446	1,395	108	11	1,186	310	34	38
September	152	206	538	1,397	109	14	2,608	360	38	53
October	149	187	446	1,131	89	14	2,915	470	n.p.	n.p.
1993-94—										
July to October	663	779	2,129	5,409	428	48	8,562	1,369	n.p.	n.p.
1994-95—										
July to October	633	818	2,095	5,426	420	48	8,409	1,471	n.p.	n.p.

(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
1993-94—										
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
1994-95—										
July	3,905	89	10,110	204	14,308	225	n.p.	1,674	n.p.	1,919
August	3,670	73	7,511	198	11,452	205	12	1,344	8	1,569
September	4,221	94	9,839	327	14,481	259	n.p.	2,017	n.p.	2,300
October	4,404	80	9,185	411	14,080	254	n.p.	1,508	n.p.	1,779
1993-94—										
July to October	14,938	399	40,813	1,810	57,960	1,027	n.p.	6,940	n.p.	8,071
1994-95—										
July to October	16,200	337	36,645	1,140	54,322	943	n.p.	6,543	n.p.	7,566

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
1993-94—										
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
1994-95—										
July	3,670	59	3,923	49	7,701	n.p.	9	409	n.p.	475
August	2,665	36	3,003	44	5,748	n.p.	8	307	n.p.	352
September	2,639	50	3,448	125	6,263	46	n.p.	397	n.p.	456
October	2,226	61	2,829	53	5,169	51	n.p.	356	n.p.	417
1993-94—										
July to October	10,379	154	11,187	383	22,103	209	n.p.	1,539	n.p.	1,792
1994-95—										
July to October	11,200	207	13,203	271	24,882	189	n.p.	1,470	n.p.	1,700

(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 al	\$'000
IMPORTS CLEARED								
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
1993-94	4,404	152	2,301	1,484	8,341	47,637	634	8,243
1993-94—								
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
June	582	24	115	125	845	4,448	44	550
1994-95—								
July	396	39	208	113	755	3,595	52	467
August	415	8	215	188	827	4,301	60	779
September	477	9	133	279	898	4,065	48	568
1993-94—								
July to September	1,322	30	649	394	2,396	12,697	153	2,290
1994-95—								
July to September	1,288	57	556	579	2,480	11,961	160	1,813
EXPORTS (a)								
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
1993-94	116,545	2,873	5,035	893	125,347	366,305	36	524
1993-94—								
July	13,018	231	510	46	13,806	38,042	4	43
August	10,620	287	667	26	11,601	32,188	-	9
September	12,319	432	699	86	13,537	43,730	6	38
October	11,952	441	824	319	13,536	38,475	4	29
November	7,672	144	462	82	8,360	22,520	3	71
December	7,688	313	200	136	8,337	23,428	2	35
January	5,871	84	175	30	6,159	16,296	1	56
February	6,741	181	223	18	7,163	22,071	1	6
March	10,352	91	245	33	10,720	31,620	7	128
April	9,807	302	365	35	10,509	33,784	-	5
May	9,837	266	361	45	10,509	32,113	4	86
June	10,666	100	305	37	11,109	34,250	3	17
1994-95—								
July	9,961	435	304	32	10,732	32,553	4	144
August	10,587	220	387	49	11,243	36,796	2	39
September	13,076	180	641	47	13,943	45,714	5	108
1993-94—								
July to September	35,957	951	1,877	158	38,943	111,750	10	90
1994-95—								
July to September	33,624	835	1,331	128	35,919	115,064	11	292

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

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

Country/Region	Wine type				Total wine	
	Table	Fortified	Sparkling	Other	Quantity	Value
			(Litres)			(\$'000)
New Zealand	1,937,001	38,399	65,229	17,743	2,058,372	3,967
Papua New Guinea	42,482	540	7,770	180	50,972	277
Vanuatu	26,795	-	765	-	27,560	54
Total Oceania & Antarctica (a)	2,040,435	39,538	79,300	19,938	2,179,211	4,456
Denmark	142,937	-	450	-	143,387	338
France	179,667	-	360	-	180,027	285
Germany	113,954	4,626	13,374	504	132,458	720
Ireland	315,632	-	1,350	-	316,982	1,100
Netherlands	133,005	-	-	-	133,005	471
Norway	230,247	-	-	-	230,247	528
Sweden	624,404	-	-	26	624,430	1,049
Switzerland	111,695	180	7,740	-	119,615	624
United Kingdom	7,289,129	93,423	460,699	4,155	7,847,406	27,319
Total Europe & the CIS (a)	9,221,346	98,229	483,973	4,685	9,808,233	32,763
Bahrain	10,825	-	450	-	11,275	20
United Arab Emirates	22,140	240	3,195	450	26,025	54
Total Middle East & North Africa (a)	32,965	240	3,645	450	37,300	75
Malaysia	10,700	-	2,820	8,766	22,286	73
Singapore	62,056	-	2,133	5,472	69,661	240
Thailand	20,973	-	72	-	21,045	75
Total Southeast Asia (a)	119,667	248	7,347	15,044	142,306	544
Hong Kong	57,504	4,700	20,742	2,128	85,074	365
Japan	141,254	21,400	27,392	4,100	194,146	690
Taiwan	4,950	-	-	-	4,950	38
Total Northeast Asia (a)	205,322	26,154	48,404	6,252	286,132	1,110
Canada	387,749	8,181	1,125	-	397,055	1,522
USA	1,059,428	7,074	9,018	567	1,076,087	5,162
Total North America (a)	1,447,177	15,255	10,143	567	1,473,142	6,684
Total Other Regions(b)	9,054	-	8,100	-	17,154	83
Total All Countries	13,075,966	179,664	640,912	46,936	13,943,478	45,714

(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
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
1993-94	r24,955	r73,256	943	r2,122	5,268	18,461	341	r125,347
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	8,616	111	166	468	2,151	45	13,537
October	3,067	7,735	63	328	628	1,668	47	13,536
November	2,065	4,417	65	147	332	1,266	67	8,360
December	2,335	3,821	49	248	607	1,252	25	8,337
January	1,281	3,728	56	80	223	776	15	6,159
February	1,420	3,760	95	149	309	1,405	26	7,163
March	1,652	6,944	67	188	365	1,477	26	10,720
April	2,547	5,930	89	140	328	1,450	25	10,509
May	2,468	5,934	88	168	346	1,491	15	10,509
June	r1,061	r7,489	68	182	602	1,682	24	r11,108
1994-95—								
July	r2,140	r6,038	r87	r76	r454	r1,921	15	r10,732
August	r1,321	r8,175	r109	r124	r144	r1,340	29	r11,243
September	2,179	9,808	37	142	286	1,473	17	13,943
1993-94—								
July-September	7,058	23,498	303	492	1,528	5,994	71	38,943
1994-95—								
July-September	5,641	24,021	234	342	885	4,734	62	35,919

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 quarterly, 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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- n.y.a. not yet available
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15. Where figures have been rounded, discrepancies may occur between sums of the component items and totals.

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