

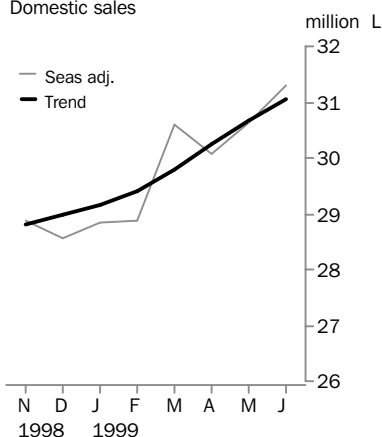


SALES OF AUSTRALIAN WINE AND BRANDY BY WINEMAKERS

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Australian produced wine

Domestic sales



JUNE KEY FIGURES

TREND ESTIMATES

	Jun 1999 '000 L	% change May 1999 to Jun 1999	% change Jun 1998 to Jun 1999
Australian produced wine			
Domestic wine sales	31 040	1.2	11.2
White table wine sales	16 172	0.6	4.0
Red and rosé table wine sales	9 326	1.3	28.6

SEASONALLY ADJUSTED

	Jun 1999 '000 L	% change May 1999 to Jun 1999	% change Jun 1998 to Jun 1999
Australian produced wine			
Domestic wine sales	31 281	2.1	10.1
White table wine sales	16 725	9.7	5.7
Red and rosé table wine sales	9 538	2.4	25.5

JUNE KEY POINTS

TREND ESTIMATES

- The trend series for total domestic sales of Australian produced wine rose by 1.2% in June to 31.0 million litres and was 11.2% higher than June 1998. This continues recent high levels of sales and appears to be due, at least in part, to less reliance on blending imported wine with Australian produced wine for the domestic market. This is evident in the recent fall in the volume of imports and appears to have been more prevalent for red wine products.
- The trend estimate for white table wine increased by 0.6% on May and by 4.0% on June 1998.
- The trend for red/rosé table wine recorded growth in June of 1.3% and is now 28.6% higher than June 1998.

SEASONALLY ADJUSTED ESTIMATES

- The seasonally adjusted estimate for total domestic sales of Australian produced wine was at 31.3 million litres, up 2.1% on May and 10.1% on June 1998.
- The seasonally adjusted estimate for white table wine rose 9.7% on May while the estimate for red/rosé table wine increased by 2.4%.

ORIGINAL ESTIMATES

- In original terms 29.8 million litres of Australian produced wine was sold domestically by winemaking businesses during June, up 4.9% on May and up 8.7% on June 1998.
- For the 1998-99 financial year a record total of 348.3 million litres of wine was sold, an increase of 2.8% on the previous record in 1997-98.

- For further information about these and related statistics, contact Helen Shannon on Adelaide 08 8237 7420, or Client Services in any ABS office as shown on the back cover of this publication.

NOTES

FORTHCOMING ISSUES

<i>ISSUE</i>	<i>RELEASE DATE</i>
July 1999	3 September 1999
August 1999	5 October 1999
September 1999	3 November 1999
October 1999	3 December 1999
November 1999	11 January 2000
December 1999	4 February 2000



CHANGES IN THIS ISSUE

There are no changes in this issue.



W. McLennan
Australian Statistician

DOMESTIC AUSTRALIAN TABLE WINE SALES: Trend

TABLE WINE, GLASS CONTAINER < 2 LITRES

The June trend estimate for white table wine in glass containers less than 2 litres rose by 14.1% on June 1998 and by 28.0% on June 1996. Sales of red/rosé table wine recorded even stronger growth at 27.0% since June 1998 and 69.2% on June 1996.

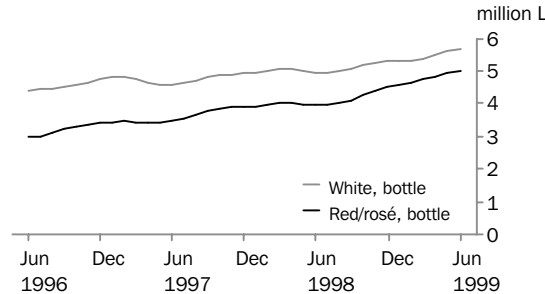
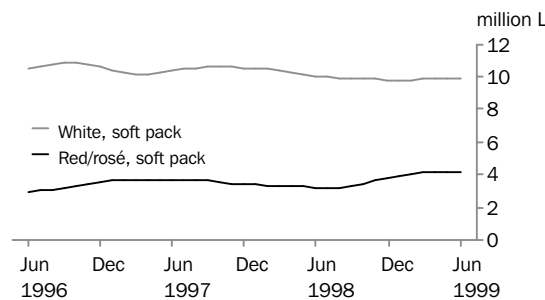


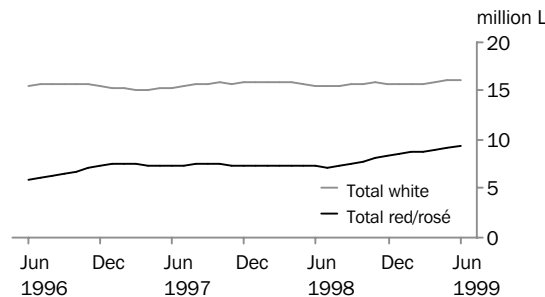
TABLE WINE, SOFT PACK CONTAINERS

The trend estimate in June for white table wine in soft packs fell by 0.9% since June 1998 and by 6.0% since June 1996. In contrast, the recent rise in Australian red/rosé in soft packs continued, due in part to the increase in Australian product content as a result of a lessening of imported product blended with local wine. Overall, the June trend estimate for Australian product in red/rosé soft packs rose 30.6% on June 1998 and 42.9% on June 1996.



TOTAL WHITE AND RED/ROSÉ TABLE WINE

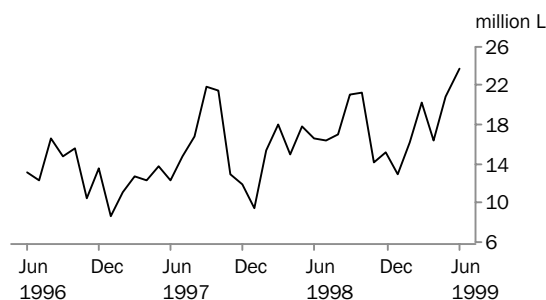
The June trend estimate for domestic sales of total white wine has risen by 4.0% since June 1998 and by 4.6% since June 1996. The trend estimate for red/rosé table wine has increased by 28.6% since June 1998 and by 55.5% since June 1996.



EXPORTS OF AUSTRALIAN PRODUCED WINE AND IMPORTS

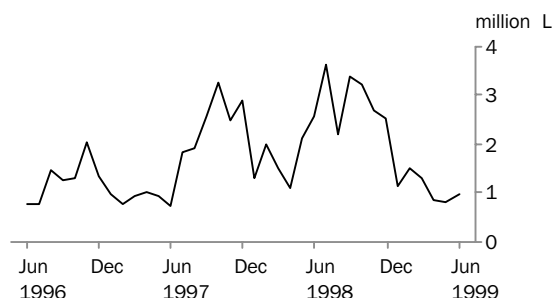
EXPORTS OF AUSTRALIAN PRODUCED WINE

Original data shows that a total of 23.8 million litres of Australian produced wine was exported in June. This volume is up 42.2% on June 1998 and represents the highest recorded monthly export of wine. For the 1998-99 financial year a record 215.9 million litres of wine has been exported, 23.5 million litres or 12.2% more than the previous record exports for the 1997-98 financial year.



WINE IMPORTS CLEARED FOR HOME CONSUMPTION

Original data for June shows that 1.0 million litres of wine was imported for home consumption. For the 1998-99 financial year 24.3 million litres of wine worth \$102.5 million was imported. This is a fall of 5.3% in quantity but a 10.3% increase in value compared to the previous financial year. Although the volume fell slightly, it is still the second highest financial year total.



DISPOSALS OF AUSTRALIAN PRODUCED WINE AND WINE AVAILABLE FOR CONSUMPTION IN AUSTRALIA

Original data for the 1998-99 financial year shows that wine available for consumption in Australia rose by 2.2% on 1997-98. An increase of 2.8% in domestic sales of Australian produced wine was partly offset by a 5.3% fall in imported product. Total disposals of Australian wine increased by 6.2% over the same period mostly driven by a 12.2% rise in export volume.

Period	A Domestic sales of Australian produced wine '000 L	B Wine imports cleared for home consumption '000 L	A + B Wine available for consumption '000 L	C Exports of Australian produced wine '000 L	A + C Total disposals of Australian produced wine '000 L
1996-1997	333 591	13 589	347 180	154 393	487 984
1997-1998	338 814	25 622	364 436	192 404	531 218
1998-1999	348 349	24 255	372 604	215 882	564 231
June Qtr 1998	82 616	5 805	88 421	49 551	132 167
June Qtr 1999	88 471	2 607	91 078	61 158	149 629

DOMESTIC SALES OF TOTAL AUSTRALIAN WINE & TABLE WINE BY CONTAINER TYPE

Period	TABLE-WHITE WINE.....				TABLE-RED AND ROSÉ WINE.....				
	Total wine	Glass less than 2 litres(a)	Soft packs(b)	Other containers(c)	Total	Glass less than 2 litres(a)	Soft packs(b)	Other containers(c)	Total
		'000 L	'000 L	'000 L		'000 L	'000 L	'000 L	
ORIGINAL									
1996-1997	333 591	55 212	126 492	3 324	185 032	41 144	41 574	1 016	83 733
1997-1998	338 814	59 352	125 269	4 888	189 512	46 746	41 295	868	88 909
1998-1999	348 349	63 354	117 954	7 000	188 310	53 713	44 564	811	99 088
1997-1998									
June	27 414	4 438	10 037	385	14 861	4 270	3 716	68	8 054
1998-1999									
July	31 795	5 213	10 238	627	16 078	5 572	4 385	61	10 017
August	24 820	4 101	8 946	282	13 329	4 018	3 403	48	7 469
September	28 494	4 956	10 090	485	15 532	4 182	3 678	59	7 919
October	31 975	6 366	10 422	754	17 542	4 573	3 369	98	8 040
November	34 587	6 358	11 647	885	18 890	4 824	3 722	205	8 751
December	36 615	7 111	11 140	889	19 140	5 016	3 973	79	9 067
January	18 100	3 691	6 484	653	10 828	2 290	2 087	46	4 423
February	24 291	4 627	9 423	726	14 775	3 217	3 146	58	6 422
March	29 201	5 588	10 350	449	16 388	4 609	3 684	47	8 340
April	30 274	5 625	10 456	526	16 608	5 024	4 065	56	9 144
May	28 408	4 906	8 971	384	14 261	5 103	4 178	32	9 314
June	29 789	4 812	9 787	340	14 939	5 285	4 874	22	10 182
SEASONALLY ADJUSTED									
1997-1998									
June	28 412	5 375	9 912	n.a.	15 825	4 086	3 304	n.a.	7 599
1998-1999									
July	27 074	4 922	9 515	n.a.	15 089	3 942	3 063	n.a.	6 910
August	26 866	4 141	9 695	n.a.	14 492	3 502	3 049	n.a.	6 866
September	28 969	5 237	10 607	n.a.	16 516	4 325	3 545	n.a.	7 842
October	29 529	5 942	10 169	n.a.	16 690	4 401	3 443	n.a.	7 951
November	28 887	5 110	9 764	n.a.	15 382	4 442	3 320	n.a.	7 935
December	28 560	5 279	9 283	n.a.	15 563	4 676	3 997	n.a.	8 736
January	28 834	5 249	9 946	n.a.	15 581	4 515	4 033	n.a.	8 418
February	28 870	5 177	10 042	n.a.	15 682	4 570	4 157	n.a.	8 765
March	30 598	5 582	9 820	n.a.	15 941	4 833	4 115	n.a.	8 873
April	30 059	5 590	10 318	n.a.	16 315	4 811	4 098	n.a.	8 793
May	30 644	5 407	9 302	n.a.	15 253	5 010	4 016	n.a.	9 311
June	31 281	5 837	10 145	n.a.	16 725	5 097	4 345	n.a.	9 538
TREND ESTIMATES									
1997-1998									
June	27 907	4 969	10 033	n.a.	15 554	3 960	3 207	n.a.	7 254
1998-1999									
July	27 851	4 965	9 985	n.a.	15 528	3 958	3 187	n.a.	7 243
August	27 982	5 018	9 956	n.a.	15 583	4 017	3 217	n.a.	7 339
September	28 228	5 101	9 933	n.a.	15 673	4 129	3 303	n.a.	7 540
October	28 544	5 197	9 911	n.a.	15 767	4 274	3 451	n.a.	7 826
November	28 806	5 281	9 893	n.a.	15 825	4 420	3 636	n.a.	8 126
December	28 971	5 330	9 857	n.a.	15 793	4 537	3 812	n.a.	8 376
January	29 152	5 347	9 829	n.a.	15 739	4 619	3 954	n.a.	8 567
February	29 405	5 355	9 837	n.a.	15 721	4 682	4 049	n.a.	8 712
March	29 806	5 414	9 882	n.a.	15 809	4 764	4 113	n.a.	8 870
April	30 255	5 506	9 913	n.a.	15 937	4 860	4 154	n.a.	9 037
May	30 676	5 603	9 927	n.a.	16 071	4 954	4 187	n.a.	9 202
June	31 040	5 672	9 940	n.a.	16 172	5 031	4 189	n.a.	9 326

(a) Prior to July 1998, data was collected for glass containers 1 litre and under. See Explanatory Note 3.

(b) Soft pack containers include all collapsible packs, plastic or otherwise.

(c) Other containers include tankers, cans and rigid containers, including glass 2 litres and over. Prior to July 1998, data was collected for glass containers over 1 litre. See Explanatory Note 3.

DOMESTIC SALES OF AUSTRALIAN WINE AND BRANDY BY WINEMAKERS

WINE TYPE.....

Period	Table	Fortified	Sparkling bottle fermentation(a)	Sparkling bulk fermentation(a)	Carbonated(b)	Flavoured(c)	Vermouth	Brandy(d)
	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L al
1996-1997	268 766	25 629	23 370	9 182	3 431	2 183	1 026	987
1997-1998	278 422	24 574	22 310	8 759	1 641	2 145	963	974
1998-1999	287 398	23 920	20 292	12 325	1 447	2 141	824	905
1997-1998								
April	23 936	2 193	1 485	696	113	167	44	66
May	22 125	2 214	1 170	721	105	204	31	68
June	22 915	2 511	1 057	574	84	171	101	85
1998-1999								
July	26 095	2 902	1 569	792	105	265	67	78
August	20 798	1 919	1 146	588	102	196	72	85
September	23 451	1 874	1 746	1 065	136	151	71	71
October	25 583	2 201	2 286	1 448	145	198	113	82
November	27 641	1 902	3 169	1 410	169	174	121	83
December	28 207	2 155	3 779	2 005	214	203	53	114
January	15 250	963	969	648	77	133	58	55
February	21 197	1 277	984	619	86	94	34	48
March	24 728	1 854	1 293	971	109	156	90	75
April	25 752	2 015	1 236	944	111	185	32	63
May	23 575	2 340	1 157	946	106	203	81	67
June	25 121	2 518	958	889	87	183	32	81

(a) Spritzig table wines are included with table wine.

(b) Prior to 1997, data for Carbonated wine includes some spritzig style wine which was mis-reported.

(c) Includes wine cocktails, marsala, aperitif and tonic wines.

(d) Quantities on which excise duty was paid. Data before July 1997 contained brandy made from fruit other than grape.

IMPORTS CLEARED & EXPORTS OF AUSTRALIAN PRODUCED WINE & BRANDY

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(a)(b)								
1996-1997	10 105	105	2 387	993	13 589	66 503	628	7 889
1997-1998	21 447	135	2 996	1 044	25 622	92 926	661	7 861
1998-1999	20 136	92	2 915	1 113	24 255	102 498	598	7 528
1997-1998								
April	1 026	3	57	24	1 111	3 936	46	562
May	1 865	11	168	84	2 128	6 824	48	555
June	2 297	11	205	54	2 566	8 630	65	641
1998-1999								
July	3 435	17	114	63	3 629	8 499	46	551
August	1 924	8	180	85	2 197	7 676	49	610
September	2 888	9	343	158	3 398	10 575	54	607
October	2 694	3	460	79	3 236	12 779	54	694
November	1 989	10	483	209	2 691	14 068	56	763
December	2 117	4	354	74	2 549	11 752	72	1 070
January	972	5	131	40	1 148	5 790	34	421
February	1 321	6	127	37	1 491	6 902	32	412
March	1 069	2	190	49	1 310	6 337	52	608
April	536	10	187	107	840	6 012	49	553
May	543	10	150	102	805	5 609	50	622
June	647	10	195	110	962	6 499	50	617
EXPORTS(c)								
1996-1997	144 892	2 490	6 046	966	154 393	603 297	17	526
1997-1998	183 024	2 505	6 110	764	192 404	873 847	26	385
1998-1999	206 027	2 244	6 931	680	215 882	1 066 474	24	246
1997-1998								
April	14 161	190	569	27	14 947	71 556	—	1
May	17 343	164	321	64	17 891	92 892	—	1
June	16 070	216	386	42	16 713	79 878	2	66
1998-1999								
July	15 610	198	489	77	16 374	76 509	2	10
August	16 124	226	491	102	16 942	87 513	1	13
September	20 122	208	743	85	21 158	107 674	2	49
October	20 224	206	928	49	21 408	107 181	4	31
November	13 316	211	645	32	14 205	67 323	1	11
December	r14 560	151	503	54	r15 268	r81 157	2	15
January	12 533	88	302	22	12 945	59 798	2	10
February	r15 531	142	536	17	r16 225	r83 333	3	45
March	r19 446	310	393	52	r20 201	r102 156	—	6
April	r15 910	130	304	163	r16 506	r84 713	1	14
May	r20 087	208	r570	15	r20 881	r103 056	2	17
June	22 564	167	1 026	14	23 771	106 061	3	24

r figure or series revised since previous issue

(a) Due to change in the Customs Tariff codes implemented in July 1996, the wine type categories are not necessarily comparable with earlier data.

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

(b) Imports cleared for home consumption, see Explanatory Note 4.

EXPORTS OF AUSTRALIAN WINE BY COUNTRY OF DESTINATION, June 1999

Country/Region	WINE TYPE.....				TOTAL WINE.....	
	Table	Fortified	Sparkling	Other	Quantity	Value
	L	L	L	L	L	\$'000
Fiji	38 964	202	6 593	207	45 966	248
New Zealand	2 689 952	49 576	69 624	8 082	2 817 234	6 380
Vanuatu	11 922	270	900	—	13 092	37
Total Oceania and Antarctica(a)	2 778 860	52 006	79 360	8 419	2 918 645	6 831
Denmark	216 836	180	72	—	217 088	917
Germany, Federal Republic of	886 673	—	—	—	886 673	5 179
Ireland	541 665	—	1 436	—	543 101	3 124
Netherlands	207 804	—	549	—	208 353	1 024
Sweden	406 777	—	16 236	—	423 013	1 392
United Kingdom	10 978 843	28 930	755 743	1 276	11 764 792	48 828
Total European Union	13 485 630	33 430	781 596	1 276	14 301 932	61 570
Norway	160 620	—	1 188	—	161 808	640
Switzerland	557 760	—	1 575	36	559 371	1 657
Total Europe and the Former USSR (a)	14 215 242	33 430	784 359	1 312	15 034 343	63 901
Oman	8 250	—	—	—	8 250	18
United Arab Emirates	90 993	—	3 717	450	95 160	225
Total Middle East and North Africa(a)	100 371	72	3 897	450	104 790	258
Malaysia	103 148	—	2 475	450	106 073	717
Singapore	116 090	685	6 144	9	122 928	926
Total Southeast Asia(a)	331 847	16 901	19 001	459	368 208	2 119
Hong Kong	153 550	2 117	3 717	900	160 284	942
Japan	250 147	9 108	9 288	18	268 561	1 434
Total Northeast Asia(a)	510 417	11 405	14 747	918	537 487	3 070
Canada	1 067 738	36 598	13 797	—	1 118 133	6 568
United States of America	3 422 640	15 917	108 911	2 160	3 549 628	22 611
Total Northern America(a)	4 500 665	52 515	122 708	2 160	4 678 047	29 236
Total Other Regions (b)	126 198	945	1 998	—	129 141	646
Total All Countries	22 563 599	167 274	1 026 069	13 718	23 770 660	106 061

(a) Includes other countries as detailed in *Standard Australian Classification of Countries* (Cat. no. 1269.0).

(b) Includes ships' stores.

EXPORTS OF AUSTRALIAN WINE BY REGION(a)

	<i>Oceania & Antarctica</i>	<i>Europe & the Former USSR</i>	<i>Middle East & North Africa</i>	<i>Southeast Asia</i>	<i>Northeast Asia</i>	<i>Northern America</i>	<i>Other(b)</i>	<i>Total all regions</i>
<i>Period</i>	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L
1996-1997	17 918	95 491	974	3 698	7 067	28 906	338	154 393
1997-1998	23 382	115 654	1 266	2 830	9 245	39 562	466	192 404
1998-1999	23 677	132 944	858	4 297	7 636	45 882	587	215 882
1997-1998								
April	1 359	10 067	92	170	910	2 320	27	14 947
May	1 269	11 606	293	251	1 088	3 346	39	17 891
June	1 448	10 378	74	227	799	3 749	38	16 713
1998-1999								
July	2 236	9 622	93	186	712	3 511	14	16 374
August	2 276	11 247	58	398	573	2 364	24	16 942
September	2 271	13 514	6	382	839	4 120	26	21 158
October	2 230	14 021	92	348	681	4 011	24	21 408
November	3 039	6 576	26	522	674	3 292	76	14 205
December	926	r9 256	39	355	549	4 114	28	r15 268
January	2 131	6 889	81	203	601	2 988	52	12 945
February	1 472	r10 272	48	330	551	3 485	65	r16 225
March	1 910	r12 880	137	493	490	r4 267	23	r20 201
April	1 107	9 994	75	r322	738	r4 208	60	r16 506
May	r1 158	r13 639	97	389	r690	r4 842	66	r20 881
June	2 919	15 034	105	368	537	4 678	129	23 771

r figure or series revised since previous issue

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

(b) Includes ships' stores.

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 1–2 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. From July 1998 the definition for table wine in the glass container categories changed from '1 litre and under' to 'less than 2 litres'. This series has been retained as the contribution of the over 1 litre but under 2 litres containers (such as table wine in magnum sized bottles) is believed to have been less than 1%. There is an expectation this contribution will increase in the future. This has a consequential effect for the 'other containers' category which includes glass containers 2 litres and over from July 1998 (prior to this it was glass over 1 litre). This series will also be retained.

4 Figures relating to international trade in wine and brandy are presented in table 3 to provide a basis for assessing the overall wine market. 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 seasonally adjusted estimates in this publication have been produced using a concurrent methodology whereby the seasonal factors are revised each month to take into account the seasonality exhibited by the latest observation. A more detailed review is conducted annually.

7 The overall degree of revision to the seasonally adjusted estimates is expected to be less on average than would be the case with annual reanalysis only. However, the nature of the seasonal adjustment process is such that the magnitude of some revisions resulting from each adjustment may be quite significant, especially towards the end of the series. For this reason additional care should be exercised when interpreting movements in seasonally adjusted data for recent months.

EXPLANATORY NOTES

SEASONALLY ADJUSTED AND TREND ESTIMATES *continued*

8 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.

9 For further information, see *A Guide to Interpreting Time Series—Monitoring Trends, an Overview* (Cat. no. 1348.0) or contact the Assistant Director, Time Series Analysis on (02) 6252 6345.

ACKNOWLEDGMENT

10 ABS publications draw extensively on information provided freely by individuals, businesses, governments and other organisations. Their continued cooperation is very much appreciated: without it, the wide range of statistics published by the ABS would not be available. Information received by the ABS is treated in strict confidence as required by the *Census and Statistics Act 1905*.

RELATED PUBLICATIONS

11 Another ABS publication which may be of interest is the *Australian Wine and Grape Industry* (Cat. no. 1329.0). This is a statistical compendium of Australia's wine and grape industries containing information on: area of vines and production of grapes by region; wine production and grapes crushed by region; structure of the wine manufacturing industries; stocks of wine held by winemakers at 30 June; domestic wine sales; exports and imports of wine; price indexes of grapes and wine; consumption of wine and world comparisons.

12 Current publications produced by the ABS are listed in the *Catalogue of Publications and Products Australia* (Cat. no. 1101.0). The ABS also issues, on Tuesdays and Fridays, a *Release Advice* (Cat. no. 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

13 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
L	litres
L al	litres of alcohol
n.a.	not available
n.p.	not available for separate publication (but included in totals where applicable)
r	figure or series revised since previous issue

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