

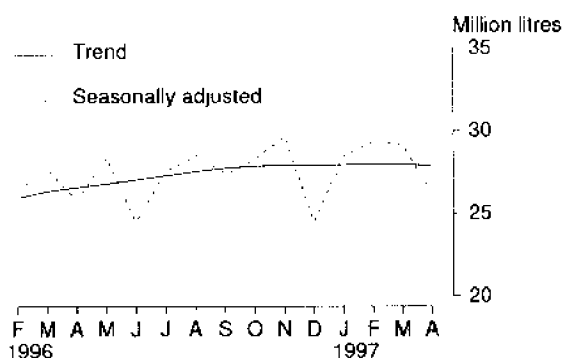
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EMBARGO: 11.30 AM (CANBERRA TIME) TUE 3 JUNE 1997

SALES OF AUSTRALIAN WINE AND BRANDY BY WINEMAKERS, APRIL 1997

SUMMARY OF FINDINGS

DOMESTIC SALES OF AUSTRALIAN PRODUCED WINE



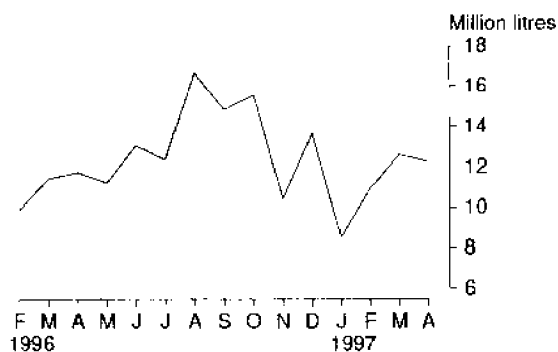
DOMESTIC SALES

The trend estimate for the total domestic sales of Australian produced wine fell by 0.4% in April. This is the first month of decline after 16 months of growth.

The seasonally adjusted estimate for the total domestic sales of Australian produced wine was 26.3 million litres, a fall of 9.6% on the previous month. The trend would return to growth if the May 1997 seasonally adjusted estimate increases by 9% or more.

In original terms, there were 24.9 million litres of Australian produced wine sold domestically during April, down 7.2% on March and up 2.2% on April 1996.

EXPORTS OF AUSTRALIAN PRODUCED WINE

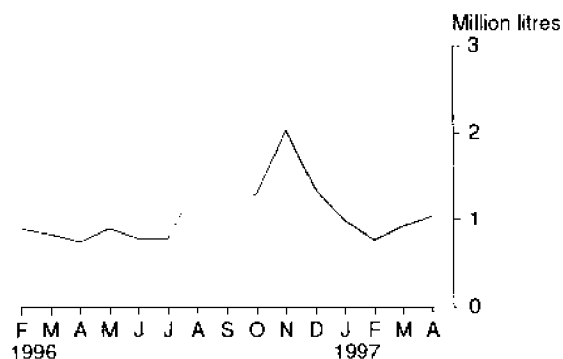


EXPORTS

A total of 12.3 million litres of Australian wine valued at \$51.0 million were exported in April. This quantity is 2.8% less than March but valued at \$1.7 million more.

Of the April exports, the United Kingdom received 46.2%, the United States of America 15.0% and New Zealand 10.6%.

WINE IMPORTS CLEARED FOR HOME CONSUMPTION



IMPORTS CLEARED FOR HOME CONSUMPTION

Australia cleared 1.0 million litres of imported wine for home consumption in April, up 12.2% on March and 36.0% on April 1996. The majority of these imports were for table wine (79.5%) while sparkling wine accounted for 11.7%.

April imports cleared for home consumption were valued at \$5.3 million, with the average value per litre being \$5.10. This compares with \$4.73 in March and \$4.48 in April 1996.

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- for more information about statistics in this publication and the availability of related unpublished statistics, contact Peter Carmalt on Adelaide (08) 8237 7632 or any ABS State Office.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 April		% change
	1996	1997	
	'000 L	'000 L	
White — bottles 1 litre and under	12 866	13 865	9.5
White — other containers	32 296	30 426	-5.8
Total white	44 962	44 291	-1.5
Red — bottles 1 litre and under	8 301	9 925	19.6
Red — other containers	6 466	8 823	36.5
Total red	14 767	18 748	27.0
Total table wine (includes Rosé)	60 761	64 088	5.5

Total sales of Australian produced table wine rose by 5.5% in the past 3 months compared with the same period 12 months ago. Red table wine sales rose by 27.0% with a 19.6% rise in bottle sales and a 36.5% rise in sales of other containers (mostly soft packs). White table wine sales fell by 1.5%, with bottle sales up 9.5% offset by a fall of 5.8% in other containers.

The volume of wine sales reported above does not include any quantity of imported wine that may have been blended with the Australian product.

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
1996			
3 months ended April	73 486	2 495	75 981
1997			
3 months ended April	76 627	2 727	79 354

There was an increase of 3.4 million litres or 4.4% in the wine available for consumption for the 3 months to April compared with the same period a year ago. There was an increase of 0.2 million litres in imports and an increase of 3.1 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	129 661	439 123
1996			
3 months ended April	73 486	33 049	106 535
1997			
3 months ended April	76 627	35 846	112 473

There was an increase of 5.9 million litres or 5.6% in the disposal of Australian produced wine for the 3 months to April 1997 compared with the same period a year ago. This increase is a result of a rise of 3.1 million litres (4.3%) in the domestic sales of Australian produced wine combined with a rise of 2.8 million litres (8.5%) in exports.

1

DOMESTIC SALES OF AUSTRALIAN WINE AND BRANDY BY WINEMAKERS

Period	Wine type						Total wine			
	Table	Fortified	Sparkling	Carbonated	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 at
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—										
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	27 305	109
August	22 614	2 160	2 254	199	205	71	27 503	28 495	27 550	104
September	21 690	1 872	3 059	322	152	64	27 159	27 415	27 742	66
October	22 193	2 119	3 777	335	178	86	28 688	28 237	27 872	87
November	27 834	2 357	4 618	453	215	117	35 594	29 663	27 924	104
December	25 798	2 376	5 537	512	208	121	34 551	24 454	27 926	122
January	14 677	1 297	1 570	163	179	91	17 976	28 415	27 948	54
February	21 041	1 510	1 804	286	112	81	24 833	29 387	27 994	65
March	22 674	1 630	2 171	193	136	61	26 866	29 086	27 998	64
April	20 373	2 350	1 787	183	175	59	24 928	26 283	27 887	72

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 fermentation	Bulk fermentation	Dry	Sweet	Dry	Sweet	
	Dry	Medium ²	Sweet	Port	Muscat	Other ³							Dry
	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	
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—													
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			
January	94	122	306	704	65	6	1 057	512	n.p.	n.p.			
February	116	129	323	873	63	5	1 316	488	30	51			
March	110	155	325	968	66	6	1 635	536	29	32			
April	137	200	515	1 402	89	6	1 350	437	27	32			

¹ Spritzig table wines are included with table wine.

² Includes semi-sweet and medium dry.

³ Includes madeira, tokay and white port.

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—								
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	1 265	10	96	80	1 451	5 790	58	727
September	917	22	228	98	1 265	6 118	50	562
October	746	19	322	214	1 301	7 152	52	716
November	1 573	8	354	100	2 036	8 073	70	905
December	954	8	320	75	1 357	8 373	85	1 059
January	719	15	234	24	991	5 168	40	678
February	605	7	156	6	775	4 092	42	516
March	r613	5	173	129	r920	r4 348	35	411
April	820	2	121	90	1 032	5 261	45	571
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	121 028	2 506	5 487	639	129 661	471 498	24	731
1995-96—								
February	9 189	154	491	45	9 879	34 907	1	62
March	10 594	326	456	63	11 439	42 363	1	62
April	11 177	121	390	43	11 731	41 229	—	7
May	10 710	139	337	61	11 246	41 688	2	95
June	12 312	164	537	63	13 076	48 124	4	68
1996-97—								
July	11 604	174	522	51	12 351	45 136	—	18
August	15 465	387	756	66	16 674	62 700	3	79
September	13 733	269	751	72	14 824	54 926	4	89
October	14 169	325	955	124	15 573	59 437	2	64
November	r9 774	94	557	49	r10 474	r41 264	2	51
December	12 911	256	383	88	13 638	50 492	2	68
January	r8 085	127	262	92	r8 566	r34 197	—	9
February	r10 395	78	446	42	r10 962	r44 398	—	17
March	r11 989	r214	r287	r130	r12 620	r49 268	2	80
April	11 633	165	410	56	12 264	50 972	—	5

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, APRIL 1997

Country/region	Wine type				Total wine	
	Table	Fortified	Sparkling	Other	Quantity	Value
	litres	litres	litres	litres	litres	\$'000
Cook Islands	15 970	—	252	—	16 222	45
New Caledonia	14 550	—	450	—	15 000	25
New Zealand	1 247 188	34 892	15 470	1 763	1 299 313	2 644
Total Oceania & Antarctica¹	1 318 218	38 271	19 650	3 984	1 380 123	2 934
Denmark	194 467	—	—	—	194 467	747
Germany, Federal Republic of	253 180	—	1 221	—	254 401	1 228
Ireland	356 830	—	90	—	356 920	1 341
Netherlands	179 825	—	—	—	179 825	826
Norway	198 145	—	2 700	—	200 845	723
Sweden	362 718	360	—	—	363 078	1 319
Switzerland	121 995	1 338	891	8 937	133 161	942
United Kingdom	5 269 883	52 138	330 115	15 717	5 667 853	21 981
Total Europe & The Former USSR¹	7 255 838	55 429	342 730	25 482	7 679 479	30 375
Oman	17 020	240	405	—	17 665	26
United Arab Emirates	31 119	320	2 700	675	34 814	98
Total Middle East²	83 194	935	6 108	675	90 912	237
Singapore	100 038	990	4 769	1 850	107 647	776
Thailand	50 299	—	720	—	51 019	181
Total Southeast Asia¹	204 573	1 440	6 839	5 078	217 930	1 383
Hong Kong	139 127	3 807	4 234	2 633	149 801	866
Japan	186 593	24 775	5 895	2 499	219 762	989
Total Northeast Asia¹	411 441	30 832	12 754	11 129	466 156	2 520
Canada	555 378	9 486	7 002	—	571 866	3 186
United States of America	1 791 923	28 955	14 781	9 765	1 845 424	10 240
Total North America¹	2 347 301	38 441	21 783	9 765	2 417 290	13 426
Total Other Regions²	12 312	—	—	—	12 312	97
Total All Countries	11 632 877	165 348	409 864	56 113	12 264 202	50 972

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 ²	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	14 659	83 835	946	3 525	4 446	21 999	251	129 661
1995-96—								
February	1 781	5 821	119	329	411	1 402	16	9 879
March	1 400	6 816	99	340	421	2 327	36	11 439
April	1 239	7 599	100	416	321	2 023	33	11 731
May	938	7 484	125	249	333	2 086	30	11 246
June	934	9 560	33	238	402	1 897	12	13 076
1996-97—								
July	1 704	7 522	117	313	278	2 377	38	12 351
August	1 548	11 330	55	296	395	3 033	15	16 674
September	1 564	9 467	32	419	389	2 900	55	14 824
October	2 144	9 914	61	345	570	2 511	28	15 573
November	r1 934	5 939	95	424	444	1 617	21	r10 474
December	1 264	9 048	45	336	864	2 060	22	13 638
January	1 243	4 705	58	229	695	r1 624	13	r8 566
February	r693	r6 944	126	288	541	r2 342	28	r10 962
March	r1 609	r7 767	r45	r235	r643	r2 299	r22	r12 620
April	1 380	7 679	91	218	466	2 417	12	12 264

¹ Exports may include sales made by exporters other than winemakers.

² 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 1–3 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

Dennis Trewin
Acting Australian Statistician

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