

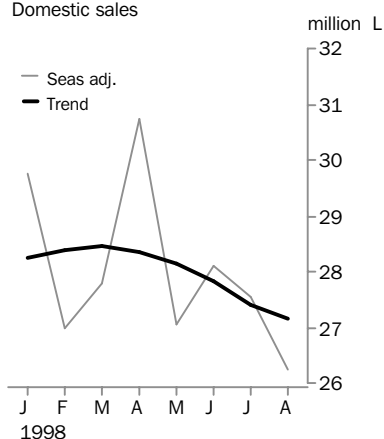


SALES OF AUSTRALIAN WINE AND BRANDY BY WINEMAKERS

EMBARGO: 11:30AM (CANBERRA TIME) THURS 8 OCT 1998

Australian produced wine

Domestic sales



AUGUST KEY FIGURES

TREND ESTIMATES

	Aug 98 '000 L	% change Jul 98 to Aug 98	% change Aug 97 to Aug 98
Australian produced wine			
Domestic wine sales	27 146	-1.0	-3.8
White table wine sales	14 851	-1.4	-5.9
Red and rosé table wine sales	6 736	-2.3	-7.3

SEASONALLY ADJUSTED

	Aug 98 '000 L	% change Jul 98 to Aug 98	% change Aug 97 to Aug 98
Australian produced wine			
Domestic wine sales	26 239	-4.7	-11.3
White table wine sales	14 108	-7.0	-15.3
Red and rosé table wine sales	6 307	-6.6	-15.0

AUGUST KEY POINTS

TREND ESTIMATES

- The trend series for total domestic sales of Australian produced wine fell by 1.0% in August. While this is the fifth consecutive month of decline in the trend series it follows a period of record domestic sales where 6 of the past 12 months trend estimates are the highest ever recorded for this series.
- The trend estimate for white table wine fell by 1.4% in August while the estimate for red/rosé table wine fell by 2.3%.

SEASONALLY ADJUSTED ESTIMATES

- The seasonally adjusted estimate for the total domestic sales of Australian produced wine for August was 26.2 million litres, down 4.7% on July and down 11.3% on August 1997.
- The seasonally adjusted estimate for white table wine fell by 7.0% in August while the estimate for red/rosé fell by 6.6%.

ORIGINAL ESTIMATES

- In original terms, 24.8 million litres of Australian produced wine was sold domestically by winemakers during August, down 21.9% on July and down 13.1% on August 1997.

- For further information about these and related statistics, contact Peter Carmalt on Adelaide 08 8237 7632 or any ABS office shown on the back cover of this publication.

NOTES

FORTHCOMING ISSUES

<i>ISSUE</i>	<i>RELEASE DATE</i>
September 1998	3 November 1998
October 1998	3 December 1998
November 1998	8 January 1999
December 1998	3 February 1999
January 1999	3 March 1999
February 1999	1 April 1999



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 August trend estimate for white table wine in glass containers less than 2 litres was up 1.7% on August 1997 and 7.0% on August 1996. The trend estimate for red/rosé table wine increased 3.2% on August 1997 and 18.6% on August 1996.

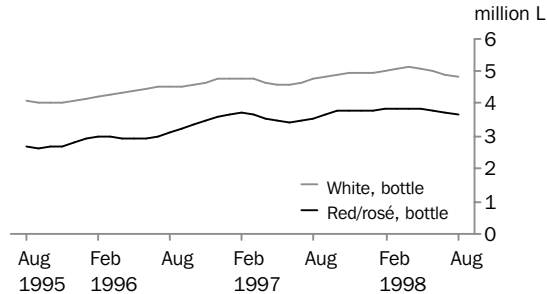
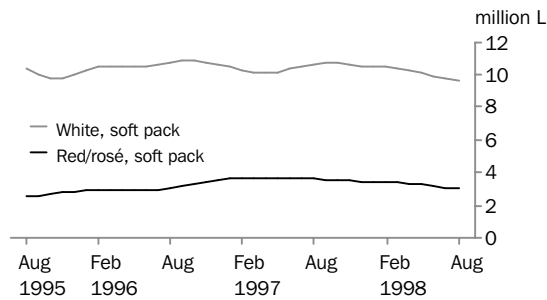


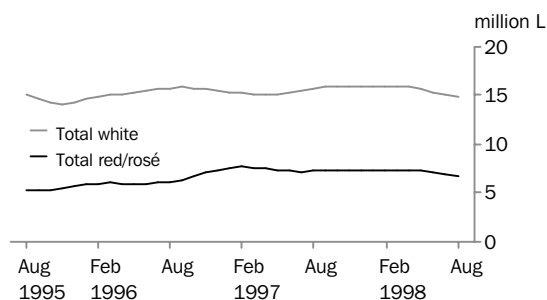
TABLE WINE, SOFT PACK CONTAINERS

The August trend estimate for white table wine in soft packs fell by 9.0% since August 1997, while red/rosé soft packs fell by 17.0%. This now the eighteenth consecutive fall for red/rosé soft packs since achieving a record high in February 1997.



TOTAL WHITE AND RED/ROSÉ TABLE WINE

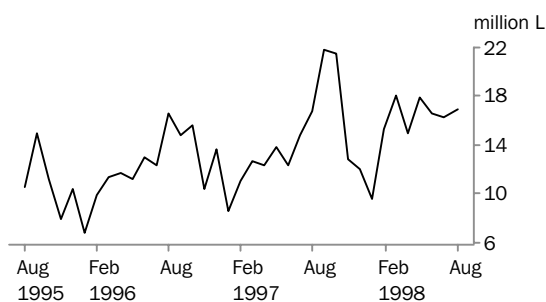
The August trend estimate for the domestic sales of total white table wine is 2.2% lower than the estimate recorded for August 1995. However, the August trend estimate for total red/rosé table wine is up 25.4% since August 1995, although it has remained relatively flat for the past 18 months.



EXPORTS OF AUSTRALIAN PRODUCED WINE AND IMPORTS

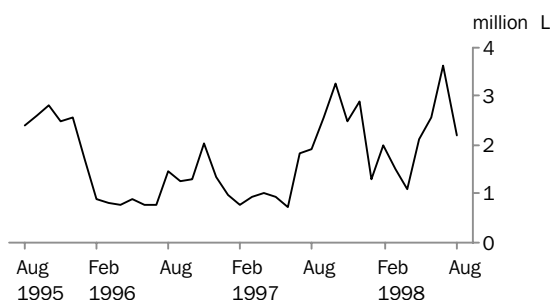
EXPORTS OF AUSTRALIAN PRODUCED WINE

Original data for August shows that 16.9 million litres of Australian produced wine was exported, 3.3% up on July 1998 and up 0.3% on August 1997.



WINE IMPORTS CLEARED FOR HOME CONSUMPTION

Original data for wine imports cleared for home consumption in August fell by 39.5% on the record July imports but were up 14.0% on August 1997.



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

Original data for the June quarter 1998 show that the wine available for consumption in Australia increased by 8.1% on the same quarter in 1997. Both imports and domestic sales of Australian produced wine contributed to this increase. Total disposals of Australian wine increased by 12.4% over the same period, largely driven by a 28.4% increase in wine exports.

	A Domestic sales of Australian produced wine	B Wine imports cleared for home consumption	A + B Wine available for consumption	C Exports of Australian produced wine	A + C Total disposals of Australian produced wine
Period	'000 L	'000 L	'000 L	'000 L	'000 L
1995-96	309 463	20 255	329 717	129 671	439 133
1996-97	333 591	13 588	347 178	154 393	487 984
1997-98	338 814	25 621	364 436	192 391	531 205
June Qtr 1997	79 059	2 704	81 763	38 575	117 634
June Qtr 1998	82 616	5 805	88 421	49 541	132 157

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	'000 L	'000 L	'000 L
ORIGINAL									
1995-96	309 463	50 588	124 357	3 769	178 707	33 711	34 020	839	68 567
1996-97	333 591	55 212	126 492	3 324	185 032	41 144	41 574	1 016	83 733
1997-98	338 814	59 352	125 269	4 888	189 512	45 220	41 295	868	87 385
1997-98									
August	28 553	4 779	10 462	270	15 511	4 124	4 198	102	8 424
September	28 043	4 588	10 235	239	15 064	3 667	3 944	62	7 674
October	29 086	5 387	10 107	395	15 888	3 831	3 537	73	7 441
November	34 559	5 911	12 576	465	18 953	4 098	3 807	66	7 970
December	34 917	6 521	12 638	478	19 638	3 668	3 156	92	6 916
January	18 719	3 652	7 495	444	11 591	2 001	1 910	42	3 955
February	22 942	4 388	9 529	525	14 442	2 758	2 414	44	5 217
March	27 282	5 041	10 741	681	16 461	3 681	2 937	54	6 673
April	28 634	5 120	10 558	418	16 096	4 211	3 494	59	7 764
May	26 568	4 552	9 833	278	14 664	4 034	3 263	73	7 370
June	27 414	4 438	10 037	385	14 861	4 176	3 716	68	7 959
1998-99									
July	31 795	5 213	10 238	627	16 078	5 481	4 385	61	9 926
August	24 820	4 101	8 946	282	13 329	3 898	3 403	48	7 349
SEASONALLY ADJUSTED									
1997-98									
August	29 594	4 820	11 820	n.a.	16 649	3 734	3 714	n.a.	7 422
September	27 728	4 885	10 434	n.a.	15 665	3 651	3 844	n.a.	7 476
October	28 248	5 049	10 474	n.a.	16 076	3 928	3 533	n.a.	7 395
November	28 788	4 662	10 849	n.a.	15 808	3 946	3 347	n.a.	7 328
December	27 102	4 716	10 097	n.a.	15 297	3 510	3 212	n.a.	6 670
January	29 767	5 768	11 273	n.a.	16 956	3 974	3 859	n.a.	7 948
February	26 970	4 620	10 110	n.a.	15 127	3 737	3 323	n.a.	7 067
March	27 776	4 939	9 981	n.a.	15 460	3 655	3 293	n.a.	7 290
April	30 752	5 144	10 952	n.a.	17 214	4 182	3 543	n.a.	7 763
May	27 059	4 776	10 114	n.a.	14 821	3 976	3 122	n.a.	7 137
June	28 090	5 963	9 776	n.a.	15 815	3 652	3 296	n.a.	7 463
1998-99									
July	27 541	4 927	9 733	n.a.	15 175	3 847	3 054	n.a.	6 751
August	26 239	4 079	9 644	n.a.	14 108	3 490	2 902	n.a.	6 307
TREND ESTIMATES									
1997-98									
August	28 212	4 751	10 675	n.a.	15 777	3 577	3 644	n.a.	7 264
September	28 385	4 838	10 762	n.a.	15 952	3 703	3 608	n.a.	7 301
October	28 370	4 902	10 746	n.a.	15 980	3 779	3 555	n.a.	7 304
November	28 275	4 953	10 661	n.a.	15 936	3 807	3 511	n.a.	7 301
December	28 226	4 970	10 583	n.a.	15 893	3 811	3 474	n.a.	7 299
January	28 250	4 979	10 525	n.a.	15 878	3 811	3 448	n.a.	7 317
February	28 370	5 029	10 480	n.a.	15 921	3 836	3 430	n.a.	7 375
March	28 441	5 088	10 412	n.a.	15 928	3 865	3 405	n.a.	7 417
April	28 365	5 119	10 280	n.a.	15 830	3 879	3 349	n.a.	7 389
May	28 154	5 099	10 129	n.a.	15 636	3 863	3 263	n.a.	7 274
June	27 822	5 034	9 968	n.a.	15 372	3 814	3 172	n.a.	7 101
1998-99									
July	27 417	4 920	9 803	n.a.	15 067	3 746	3 080	n.a.	6 894
August	27 146	4 834	9 717	n.a.	14 851	3 690	3 025	n.a.	6 736

(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	Flavoured(b)	Vermouth	Brandy(c)
	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L al
1995-96	247 271	25 863	22 923	7 226	3 087	2 086	999	1 113
1996-97	268 766	25 629	23 370	9 182	3 431	2 183	1 026	987
1997-98	276 894	24 574	22 310	8 759	3 166	2 145	963	974
1996-97								
June	21 644	2 350	912	611	280	175	32	69
1997-98								
July	26 365	2 976	1 545	556	263	259	134	103
August	23 935	2 130	1 365	573	268	199	83	87
September	22 737	2 149	1 918	745	242	165	87	88
October	23 329	1 752	2 745	660	345	173	82	75
November	26 923	2 233	3 422	1 230	437	207	106	97
December	26 552	2 090	3 899	1 634	446	197	99	121
January	15 545	1 253	1 157	379	217	125	43	55
February	19 659	1 330	1 130	401	167	130	123	58
March	23 134	1 743	1 417	590	219	148	30	71
April	23 861	2 193	1 485	696	188	167	44	66
May	22 034	2 214	1 170	721	195	204	31	68
June	22 820	2 511	1 057	574	179	171	101	85
1998-99								
July	26 004	2 902	1 569	792	196	265	67	78
August	20 678	1 919	1 146	588	222	196	72	85

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

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

(b) Includes wine cocktails, marsala, aperitif and tonic wines

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 a	\$'000
IMPORTS(a)(b)								
1995-96	16 649	105	2 673	830	20 256	60 478	583	7 462
1996-97	10 105	105	2 387	993	13 589	66 503	628	7 889
1997-98	r21 447	135	2 996	1 044	r25 622	r92 926	661	7 861
1996-97								
June	583	3	124	34	745	3 910	46	495
1997-98								
July	1 359	6	412	61	1 838	7 972	61	685
August	1 617	21	219	72	1 928	5 932	57	638
September	2 161	18	186	192	2 557	7 921	54	653
October	2 562	7	580	135	3 284	12 610	56	649
November	1 983	19	370	135	2 507	10 961	70	903
December	2 515	19	282	86	2 903	11 173	90	1 232
January	1 005	4	197	88	1 294	5 485	31	442
February	r1 733	9	218	40	r2 001	r6 017	40	431
March	1 324	7	100	73	1 504	5 465	44	468
April	1 026	3	57	24	1 111	3 936	46	562
May	1 865	11	168	84	2 128	r6 824	48	555
June	2 297	11	205	54	2 566	r8 630	65	641
1998-99								
July	r3 435	17	114	63	r3 629	r8 499	46	551
August	1 924	8	180	85	2 197	7 672	49	609
EXPORTS(c)								
1995-96	121 037	2 506	5 489	639	129 671	471 576	24	732
1996-97	r 144 892	2 490	6 046	966	r 154 393	r 603 297	17	526
1997-98	r 183 014	2 505	6 107	764	r 192 391	r 873 694	26	385
1996-97								
June	r11 858	184	213	112	r12 366	r52 102	1	27
1997-98								
July	14 156	99	481	54	14 790	63 435	1	38
August	15 968	239	540	73	16 820	69 176	2	20
September	20 635	304	785	134	21 859	91 214	4	102
October	19 849	415	1 099	131	21 493	92 162	2	14
November	12 198	207	422	60	12 887	58 073	3	50
December	11 447	169	336	43	11 996	56 540	4	33
January	9 177	191	159	15	9 543	44 260	2	21
February	14 569	200	559	43	15 371	73 679	5	25
March	17 452	111	450	77	18 090	80 949	2	12
April	14 161	190	569	27	14 947	71 556	—	1
May	17 354	164	322	64	17 904	92 932	—	1
June	r16 048	216	r 385	42	r16 690	r79 720	2	66
1998-99								
July	r15 563	r 198	r 489	77	r16 328	r76 245	2	10
August	16 095	225	489	63	16 873	87 133	1	13

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.

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

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

EXPORTS OF AUSTRALIAN WINE BY COUNTRY OF DESTINATION, August 1998

Country/Region	WINE TYPE.....				TOTAL WINE.....	
	Table	Fortified	Sparkling	Other	Quantity	Value
	L	L	L	L	L	\$'000
Fiji	48 468	575	7 542	—	56 585	292
New Caledonia	27 348	—	234	—	27 582	44
New Zealand	1 994 025	76 017	63 279	190	2 133 511	5 593
Total Oceania and Antarctica(a)	2 110 884	79 151	76 185	370	2 266 590	6 157
Denmark	307 566	—	270	—	307 836	1 388
Germany, Federal Republic of	323 763	337	360	—	324 460	1 534
Ireland	278 749	45	8 649	1 314	288 757	1 663
Netherlands	272 310	—	—	—	272 310	1 382
Sweden	358 092	113	14 418	—	372 623	1 083
United Kingdom	8 523 363	42 840	326 525	18 651	8 911 378	48 710
Total European Union	10 291 570	44 010	360 389	19 965	10 715 933	56 745
Norway	256 450	—	—	—	256 450	1 138
Switzerland	110 965	—	10 035	6 340	127 340	838
Total Europe and the Former USSR(a)	10 788 960	44 604	371 054	26 305	11 230 922	59 329
Qatar	13 600	1 350	—	—	14 950	26
United Arab Emirates	25 229	—	1 215	368	26 812	129
Total Middle East and North Africa(a)	52 558	1 350	1 665	2 908	58 481	245
Singapore	104 678	1 305	1 521	6 606	114 110	770
Thailand	132 364	23	81	—	132 468	765
Total Southeast Asia(a)	376 557	1 454	3 015	17 406	398 431	2 094
Hong Kong	100 135	1 218	3 375	175	104 903	754
Japan	325 758	14 454	3 463	16 137	359 812	2 164
Total Northeast Asia(a)	497 369	15 672	6 838	16 438	536 317	3 299
Canada	516 001	62 297	7 992	—	586 290	3 126
United States of America	1 732 987	18 792	20 534	12	1 772 325	12 774
Total Northern America(a)	2 248 988	81 089	28 526	12	2 358 615	15 900
Total Other Regions(b)	20 070	1 980	1 980	—	24 030	109
Total All Countries	16 095 386	225 299	489 263	63 438	16 873 386	87 133

(a) Includes other countries as detailed in Australian Standard Classification of Countries for Social Statistics (1269.0). (b) Includes ships' stores

EXPORTS OF AUSTRALIAN WINE BY REGION(a)

Period	Oceania & Antarctica	Europe & the Former USSR	Middle East & North Africa	Southeast Asia	Northeast Asia	Northern America	Other(b)	Total all regions
	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L
1995-96	14 659	83 835	946	3 525	4 450	21 999	257	129 671
1996-97	17 918	95 491	974	3 698	r7 067	28 906	338	r 154 393
1997-98	r23 382	r 115 645	1 266	2 830	9 244	39 559	466	r 192 391
1996-97								
June	1 714	6 663	89	274	r 719	2 860	47	r12 366
1997-98								
July	1 770	9 439	71	148	524	2 765	73	14 790
August	2 342	9 510	58	264	701	3 939	6	16 820
September	2 323	14 401	39	302	696	4 021	76	21 859
October	3 611	13 580	115	271	606	3 252	59	21 493
November	2 259	6 858	125	447	786	2 371	41	12 887
December	1 605	6 446	66	217	674	2 959	27	11 996
January	1 077	5 624	148	124	556	1 996	18	9 543
February	1 526	7 947	95	200	904	4 671	29	15 371
March	2 793	9 798	87	209	1 000	4 170	32	18 090
April	1 359	10 067	92	170	910	2 320	27	14 947
May	1 281	11 606	293	251	1 088	3 346	39	17 904
June	r1 436	10 368	74	r 227	799	3 749	38	r16 690
1998-99								
July	r2 236	r9 615	93	r 184	r 712	r3 473	14	r16 328
August	2 267	11 231	58	398	536	2 359	24	16 873

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* (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* (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* (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

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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2850400008988

ISSN 0312-925X

RRP \$15.00