



SALES OF AUSTRALIAN WINE AND BRANDY BY WINEMAKERS

AUSTRALIA

EMBARGO: 11:30AM (CANBERRA TIME) TUES 3 MAR 1998

JANUARY KEY FIGURES

TREND ESTIMATES	Jan 1998 '000 litres	Monthly % change	Annual % change
Australian produced wine			
Domestic wine sales	28 647	0.1	1.5
White table wine sales	16 103	0.2	4.9
Red and rosé table wine sales	7 919	2.0	4.4

SEASONALLY ADJUSTED	Jan 1998 '000 litres	Monthly % change	Annual % change
Australian produced wine			
Domestic wine sales	29 364	4.8	4.3
White table wine sales	16 936	10.6	7.5
Red and rosé table wine sales	8 645	22.7	9.6

JANUARY KEY POINTS

TREND ESTIMATES

- The trend for total domestic sales of Australian produced wine rose by 0.1% in January 1998, continuing the growth shown over the past few months. It is 1.5% higher than the January 1997 estimate.
- The trend for white table wine has recorded slow growth since April 1997, with January up 0.2% on the previous month and 4.9% higher than January 1997.
- The trend for red/rosé table wine in January was up by 2.0% on December 1997 and up 4.4% on January 1997.

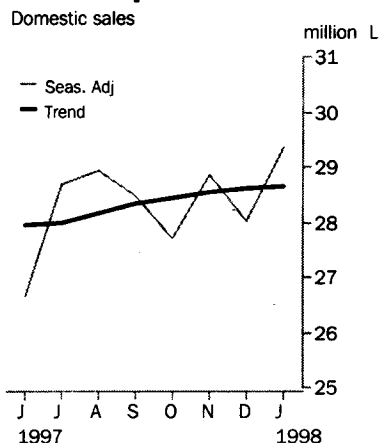
SEASONALLY ADJUSTED ESTIMATES

- The seasonally adjusted estimate for total domestic sales of Australian produced wine for January 1998 was 29.4 million litres, up 4.8% on the previous month.
- The seasonally adjusted estimates for both white and red/rosé table wine sales increased by more than 10% in January 1998. The red/rosé estimate of 8.6 million litres is the highest ever recorded for that category.

ORIGINAL ESTIMATES

- In original terms, there were 19.1 million litres of Australian produced wine sold domestically during January 1998. This is down 46.1% on the seasonally high December 1997 figure, but up 5.7% on January 1997.

Australian produced wine



INQUIRIES

- For further information about these and related statistics, contact Peter Carmalt on 08 8237 7632, or any ABS Office.

NOTES

FORTHCOMING ISSUES

<i>ISSUE</i>	<i>RELEASE DATE</i>
February 1998	3 April 1998
March 1998	4 May 1998
April 1998	3 June 1998

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CHANGES IN THIS ISSUE

While there have been no changes to the collection of data relating to domestic sales of Australian wine, changes have been made to the presentation of the data in this issue.

- The table wine categories have been collapsed with white table wine not exceeding 1 degree Baumé and white table wine exceeding 1 degree Baumé now shown as white table wine. Similarly, red table wine and rosé table wine are combined as red and rosé table wine.
- Glass over 1 litre containers for table wine have been combined with bulk table wine to create the new category of other containers.
- Other changes in the presentation of the various wine types are:
 - Muscat category is now included with other fortified
 - Only totals for sherry and vermouth are presented.
- The data previously presented in tables 1 to 3 is now presented in tables 1 and 2. Import and export data previously presented in tables 4 to 6 can now be found in tables 3 to 5.
- Six additional seasonally adjusted and trend series for various table wine categories can be found in table 1.

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W. McLennan
Australian Statistician

DOMESTIC AUSTRALIAN TABLE WINE SALES: Trend

TABLE WINE, GLASS CONTAINER < 1 LITRE

Trend estimates for both white and red/rosé table wine bottle sales have generally recorded growth over the past few years, with the growth in red/rosé sales being slightly stronger.

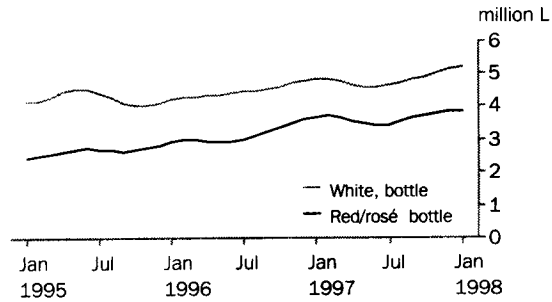
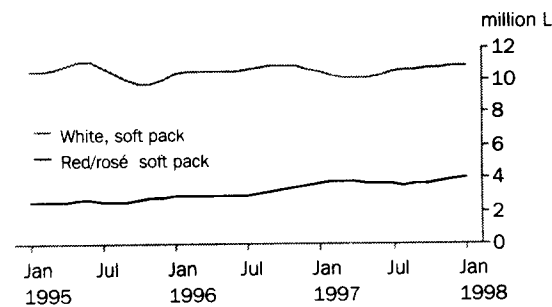


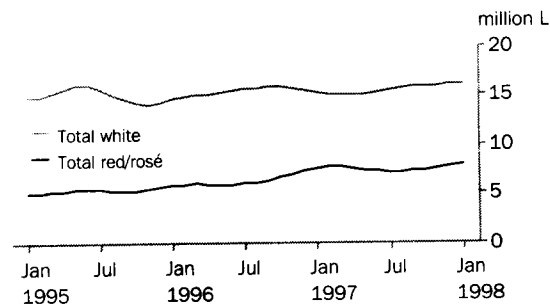
TABLE WINE, SOFT PACK CONTAINERS

The trend estimates for white table wine in soft packs have been relatively stable over the past few years. However, the trend estimates for red/rosé table wine in soft packs have increased by 66.3% since January 1995.



TOTAL WHITE AND RED/ROSÉ TABLE WINE

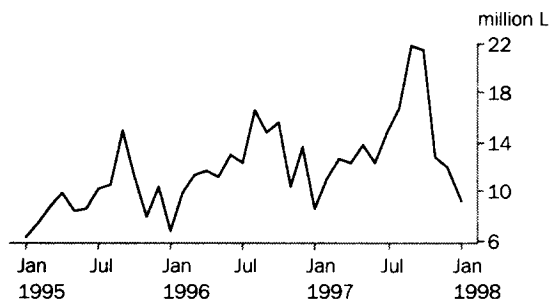
The trend estimates for the domestic sales of total white table wine have shown little change over the past few years. Trend estimates of total red/rosé table wine have increased over this period, although they appear to have flattened during the last year.



EXPORTS OF AUSTRALIAN PRODUCED WINE AND IMPORTS

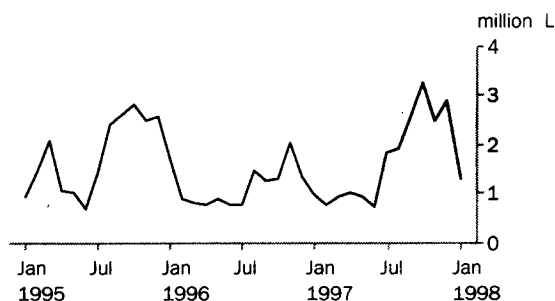
EXPORTS OF AUSTRALIAN PRODUCED WINE

Original data for exports of Australian produced wine exhibit a strong seasonal component and show the strong growth recorded over the past few years.



WINE IMPORTS CLEARED FOR HOME CONSUMPTION

Original data on wine imports cleared for home consumption show an underlying demand of around 1 million litres per month with strong, but irregular, peaks.



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

Original data for the December quarter 1997 show that the wine available for consumption in Australia has increased by 4.1% on the same quarter in 1996 and that imported wine was responsible for the most of this increase. Total disposals of wine show a 5.0% increase over the same period, with wine exports being the main contributor.

Period	A	B	A + B	C	A + C
	Domestic sales of Australian produced wine	Wine Imports cleared for home consumption	Wine available for consumption	Exports of Australian produced wine	Total disposals of Australian produced wine
	'000 L	'000 L	'000 L	'000 L	'000 L
1994-95	313 357	14 056	327 413	113 663	427 020
1995-96	309 462	20 255	329 717	129 671	439 133
1996-97	333 590	13 588	347 178	154 386	487 976
December Qtr 1996	99 060	4 694	103 754	39 689	138 749
December Qtr 1997	99 374	8 682	108 056	46 360	145 734

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

Period	TABLE-WHITE WINE.....				TABLE-RED AND ROSE WINE				
	Total wine '000 L	Glass 1 litre & under '000 L	Soft pack(a) '000 L	Other containers(b) '000 L	Total '000 L	Glass 1 litre & under '000 L	Soft pack(a) '000 L	Other containers(b) '000 L	Total '000 L
ORIGINAL									
1994-95	313 357	51 857	129 323	4 980	186 162	30 583	33 547	1 295	65 425
1995-96	309 462	50 586	124 355	3 767	178 710	33 707	34 020	836	68 564
1996-97	333 590	55 212	126 493	3 327	185 031	41 144	41 574	1 017	83 735
1996-97									
November	35 669	5 808	13 542	371	19 722	3 698	4 363	78	8 140
December	34 627	6 195	12 218	465	18 878	3 490	3 362	96	6 948
January	18 035	3 367	6 829	492	10 688	2 164	1 774	74	4 013
February	24 892	4 889	9 813	200	14 902	3 198	2 880	83	6 162
March	26 924	4 725	11 056	189	15 970	3 436	3 204	88	6 728
April	24 986	4 302	9 025	143	13 470	3 422	3 392	115	6 927
May	28 069	4 237	10 555	207	15 000	3 755	4 066	102	7 923
June	26 004	3 518	10 288	149	13 956	3 329	4 266	93	7 687
1997-98									
July	32 097	4 975	11 058	310	16 343	4 971	4 919	133	10 022
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	34 959	5 911	12 576	465	18 953	4 098	4 207	66	8 370
December	35 329	6 521	12 638	478	19 638	3 668	3 568	92	7 328
January	19 054	3 652	7 495	444	11 591	2 001	2 245	42	4 290
SEASONALLY ADJUSTED									
1996-97									
November	28 383	4 841	11 738	..	16 339	3 421	3 662	..	7 316
December	26 525	4 420	9 790	..	14 221	3 321	3 332	..	6 670
January	28 164	5 100	10 711	..	15 748	4 296	3 754	..	7 886
February	28 904	5 037	10 174	..	15 276	4 331	4 011	..	8 282
March	29 201	4 744	10 854	..	15 657	3 559	3 580	..	7 561
April	27 757	4 505	9 510	..	14 512	3 502	3 734	..	7 349
May	27 591	4 718	10 340	..	15 362	3 625	3 756	..	7 606
June	26 644	4 022	10 087	..	14 562	2 968	3 790	..	7 029
1997-98									
July	28 676	4 843	9 922	..	15 718	3 472	3 471	..	6 977
August	28 943	4 845	11 909	..	16 506	3 613	3 575	..	7 274
September	28 472	4 915	10 496	..	15 861	3 766	3 869	..	7 522
October	27 715	5 046	10 388	..	15 822	3 882	3 562	..	7 394
November	28 864	4 722	10 954	..	15 912	3 890	3 626	..	7 703
December	28 020	4 767	10 193	..	15 311	3 607	3 499	..	7 044
January	29 364	5 802	11 546	..	16 936	3 896	4 789	..	8 645
TREND ESTIMATES									
1996-97									
November	28 011	4 692	10 855	..	15 708	3 473	3 462	..	7 038
December	28 156	4 772	10 708	..	15 548	3 594	3 591	..	7 350
January	28 230	4 818	10 523	..	15 356	3 682	3 689	..	7 589
February	28 255	4 812	10 331	..	15 197	3 716	3 749	..	7 711
March	28 166	4 745	10 181	..	15 095	3 675	3 765	..	7 689
April	28 063	4 642	10 133	..	15 075	3 576	3 749	..	7 558
May	27 982	4 571	10 189	..	15 163	3 471	3 717	..	7 386
June	27 944	4 574	10 328	..	15 339	3 420	3 686	..	7 256
1997-98									
July	27 993	4 624	10 472	..	15 535	3 451	3 639	..	7 188
August	28 161	4 718	10 613	..	15 737	3 557	3 612	..	7 223
September	28 344	4 819	10 706	..	15 872	3 676	3 620	..	7 316
October	28 455	4 916	10 746	..	15 938	3 763	3 677	..	7 443
November	28 530	5 017	10 780	..	15 989	3 817	3 783	..	7 594
December	28 627	5 134	10 840	..	16 069	3 853	3 921	..	7 761
January	28 647	5 216	10 901	..	16 103	3 844	4 083	..	7 919

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

(b) Other containers include tankers, cans and rigid containers (plastic, steel, wood and glass over 1 litre).

DOMESTIC SALES OF AUSTRALIAN WINE AND BRANDY BY WINEMAKERS

WINE TYPE.....

Period	Table '000 L	Fortified Shery '000 L	Fortified Port '000 L	Other Fortified(a) '000 L	Sparkling Bottle fermen- tation(b) '000 L	Sparkling Bulk fermen- tation(b) '000 L	Carbonated '000 L	Flavoured(c) '000 L	Vermouth '000 L	Brandy(d) '000 L
1994-95	251 586	10 111	15 634	1 255	23 629	4 371	3 434	2 218	1 119	1 188
1995-96	247 274	9 668	15 096	1 101	22 923	7 226	3 089	2 087	999	1 113
1996-97	268 766	9 012	15 454	1 162	23 372	9 183	3 431	2 184	1 027	987
1996-97										
November	27 862	826	1 432	99	3 469	1 197	453	215	117	104
December	25 826	776	1 497	103	3 901	1 683	512	208	121	122
January	14 700	522	704	71	1 092	512	163	179	91	54
February	21 065	568	873	68	1 350	488	286	112	81	65
March	22 698	590	968	72	1 669	536	193	136	61	64
April	20 397	852	1 402	95	1 384	437	183	175	59	72
May	22 923	870	1 552	116	1 334	683	261	210	120	71
June	21 644	739	1 518	93	912	611	280	175	32	69
1997-98										
July	26 365	983	1 852	140	1 545	556	263	259	134	103
August	23 935	605	1 416	109	1 365	573	268	199	83	87
September	22 737	804	1 232	114	1 918	745	242	165	87	88
October	23 329	605	1 055	91	2 745	660	345	173	82	75
November	27 323	812	1 321	100	3 422	1 230	437	207	106	97
December	26 964	719	1 273	99	3 899	1 634	446	197	99	121
January	15 880	489	704	60	1 157	379	217	125	43	55

(a) Includes muscat, madeira, tokay and white port.

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

(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 L	'000 L a/	'000 L
IMPORTS(a)(b)								
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
1996-97	10 105	105	2 387	993	13 589	66 503	628	7 889
1996-97								
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	612	5	173	129	919	4 347	35	411
April	820	2	121	90	1 032	5 253	45	571
May	744	4	132	47	927	4 513	46	547
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	667
October	2 562	7	576	127	3 271	12 589	56	649
November	1 983	19	370	135	2 507	10 961	70	903
December	2 516	19	282	86	2 904	11 176	90	1 232
January	1 006	4	197	88	1 295	5 488	31	442
EXPORTS(c)								
1994-95	105 542	2 475	5 110	537	113 663	385 706	36	812
1995-96	121 037	2 506	5 489	639	129 671	471 576	24	732
1996-97	144 885	2 490	6 046	966	154 386	603 327	17	526
1996-97								
November	9 777	94	558	49	10 478	41 324	2	51
December	12 911	256	383	88	13 638	50 492	2	68
January	8 086	127	262	97	8 572	34 241	—	9
February	10 458	78	452	42	11 030	44 707	—	17
March	12 036	214	288	130	12 668	49 496	2	80
April	11 801	166	414	45	12 425	51 728	—	5
May	12 986	217	492	89	13 784	56 956	1	20
June	11 861	184	213	112	12 370	52 182	1	27
1997-98								
July	14 154	99	482	54	14 789	63 426	1	38
August	15 964	239	540	73	16 816	69 167	2	20
September	r20 635	304	785	134	r21 859	r91 214	4	102
October	r19 844	415	1 099	131	r21 489	r92 135	r2	r14
November	r12 198	r207	422	r60	r12 887	r58 071	3	50
December	r11 439	169	336	r39	r11 984	r56 415	4	33
January	8 921	191	158	15	9 285	42 960	2	21

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 previous data recorded.

(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, January 1998

Country/Region	WINE TYPE.....				TOTAL WINE.....	
	Table	Fortified	Sparkling	Other	Quantity	Value
	L	L	L	L	L	\$'000
Fiji	21 444	576	324	18	22 362	100
New Zealand	920 402	30 160	13 473	4 318	968 352	1 920
Papua New Guinea	35 972	851	1 755	—	38 578	111
Total Oceania and Antarctica(a)	1 003 228	34 536	21 004	4 336	1 063 104	2 256
Denmark	208 884	—	—	—	208 884	863
Germany, Federal Republic of	264 356	—	—	—	264 356	1 080
Ireland	169 591	—	135	—	169 726	854
Netherlands	132 384	—	—	—	132 384	591
Sweden	152 526	—	24 336	—	176 862	671
United Kingdom	3 870 592	104 100	48 249	4 680	4 027 620	18 285
Total European Union	5 004 099	104 100	73 701	4 680	5 186 580	23 176
Norway	53 860	—	—	—	53 860	216
Switzerland	193 867	—	15 338	—	209 205	1 142
Total Europe and the Former USSR(a)	5 312 702	104 100	89 039	4 680	5 510 522	24 782
Bahrain	34 960	—	—	—	34 960	46
United Arab Emirates	74 686	800	5 625	—	81 111	153
Total Middle East and North Africa(a)	140 768	1 280	5 985	—	148 033	246
Singapore	35 758	270	1 800	1 680	39 508	353
Thailand	19 692	16 000	1 395	—	37 088	129
Total Southeast Asia(a)	100 749	16 270	4 545	2 013	123 577	758
Hong Kong	103 422	540	8 199	2 787	114 948	550
Japan	354 840	4 301	2 364	—	361 505	1 784
Total Northeast Asia(a)	535 504	4 841	10 563	3 849	554 756	2 707
Canada	290 150	14 810	4 266	—	309 226	1 694
United States of America	1 523 079	14 474	20 358	180	1 558 091	10 442
Total Northern America(a)	1 813 309	29 284	24 624	180	1 867 396	12 138
Total Other Regions(b)	14 428	1 125	1 944	—	17 497	72
Total All Countries	8 920 688	191 436	157 704	15 058	9 284 886	42 960

(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)

	Oceania & Antarctica	Europe & the Former USSR	Middle East & North Africa	Southeast Asia	Northeast Asia	Northern America	Other(b)	Total all regions
Period	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L
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	4 450	21 999	257	129 671
1996-97	17 917	95 482	974	3 698	7 070	28 906	338	154 386
1996-97								
November	1 934	5 938	95	424	448	1 617	21	10 478
December	1 264	9 048	45	336	864	2 060	22	13 638
January	1 243	4 705	58	229	699	1 624	13	8 572
February	691	6 966	137	289	542	2 377	28	11 030
March	1 614	7 773	46	241	643	2 328	22	12 668
April	1 436	7 728	99	228	490	2 430	12	12 425
May	1 062	8 425	139	302	1 029	2 789	38	13 784
June	1 714	6 663	89	274	722	2 860	47	12 370
1997-98								
July	1 768	9 439	71	148	524	2 765	73	14 789
August	2 338	9 510	58	264	701	3 939	6	16 816
September	r2 323	14 401	39	302	696	4 021	76	r21 859
October	r3 611	r13 575	115	271	606	3 252	59	r21 489
November	r2 259	r6 858	125	r 447	r 786	r2 371	41	r12 887
December	r1 605	r6 440	66	r 217	r 669	r2 959	27	r11 984
January	1 063	5 511	148	124	555	1 867	17	9 285

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

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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. Figures relating to international trade in wine and brandy are presented in table 3 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 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.

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.

RELATED PUBLICATIONS

10 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.

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EXPLANATORY NOTES

11 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

12 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

.. not applicable

L litres

L al litres of alcohol

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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2850400001989
ISSN 0312-925X

RRP \$15.00



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25 APR 1999

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