

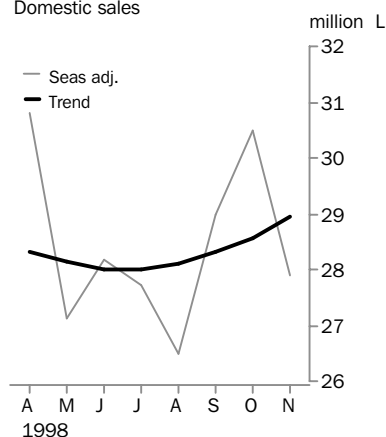


SALES OF AUSTRALIAN WINE AND BRANDY BY WINEMAKERS

EMBARGO: 11:30AM (CANBERRA TIME) FRI 8 JAN 1999

Australian produced wine

Domestic sales



NOVEMBER KEY FIGURES

TREND ESTIMATES

	Nov 98 '000 L	% change Oct 98 to Nov 98	% change Nov 97 to Nov 98
Australian produced wine			
Domestic wine sales	28 961	1.4	2.8
White table wine sales	16 106	1.2	1.6
Red and rosé table wine sales	7 775	2.4	4.5

SEASONALLY ADJUSTED

	Nov 98 '000 L	% change Oct 98 to Nov 98	% change Nov 97 to Nov 98
Australian produced wine			
Domestic wine sales	27 900	-8.5	-3.4
White table wine sales	15 150	-11.1	-5.0
Red and rosé table wine sales	7 892	0.6	4.9

NOVEMBER KEY POINTS

TREND ESTIMATES

- The trend series for total domestic sales of Australian produced wine rose by 1.4% to a new record level of 29.0 million litres. It is 2.8% higher than November 1997.
- The trend estimate for white table wine increased by 1.2% on October and 1.6% on November 1997.
- The trend estimate for red/rosé table wine increased by 2.4% on October and 4.5% on November 1997.

SEASONALLY ADJUSTED ESTIMATES

- The seasonally adjusted estimate for total domestic sales of Australian produced wine for November was 27.9 million litres, down 8.5% on October and 3.4% on November 1997.
- The seasonally adjusted estimate for white table wine fell by 11.1% on October and 5.0% on November 1997.
- The seasonally adjusted estimate for red/rosé table wine increased by 0.6% on October and 4.9% on November 1997.

ORIGINAL ESTIMATES

- In original terms, 34.6 million litres of Australian produced wine was sold domestically by wine making businesses during November, up 8.2% on October and 0.1% on November 1997.

- For further information about these and related statistics, contact Andrew Middleton on Adelaide 08 8237 7306 or any ABS office shown on the back cover of this publication.

NOTES

FORTHCOMING ISSUES

<i>ISSUE</i>	<i>RELEASE DATE</i>
December 1998	3 February 1999
January 1999	3 March 1999
February 1999	1 April 1999
March 1999	3 May 1999
April 1999	3 June 1999
May 1999	5 July 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 November trend estimate for white table wine in glass containers less than 2 litres was up 7.1% on November 1997 and up 31.2% on November 1995. The November trend estimate for red/rosé table wine was up 10.4% on November 1997 and up 60.5% on November 1995.

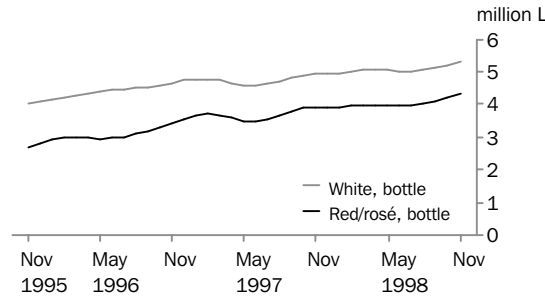
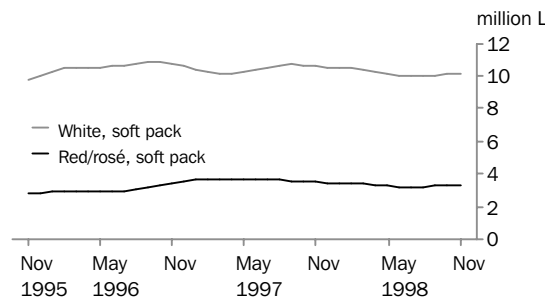


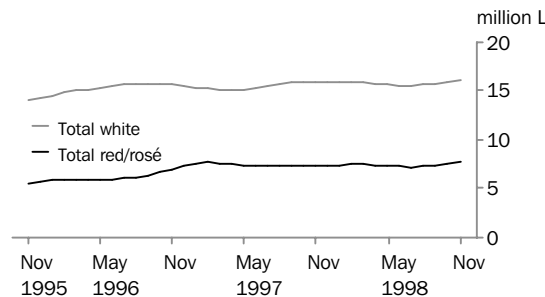
TABLE WINE, SOFT PACK CONTAINERS

The November trend estimate for white table wine in soft packs fell by 4.2% on November 1997 but was up by 3.9% on November 1995. The trend estimate for red/rosé table wine in soft packs fell by 5.9% on November 1997 but was up by 18.0% on November 1995.



TOTAL WHITE AND RED/ROSÉ TABLE WINE

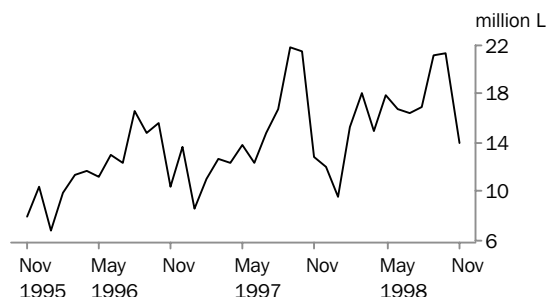
The November trend estimate for the domestic sales of total white table wine was up 1.6% on November 1997 and up 14.8% on November 1995. The November trend estimate for the domestic sales of total red/rosé table wine was up 4.5% on November 1997 and up 41.0% on November 1995.



EXPORTS OF AUSTRALIAN PRODUCED WINE AND IMPORTS

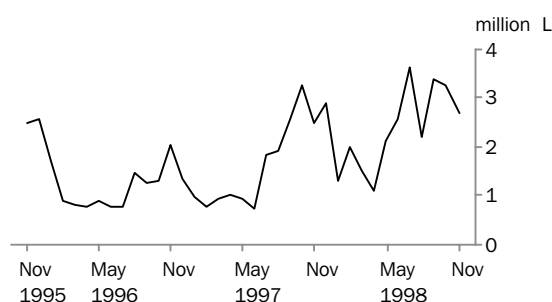
EXPORTS OF AUSTRALIAN PRODUCED WINE

Original data for November shows that 14.0 million litres of Australian produced wine was exported. This is 34.4% down on October and reflects the normal seasonal downturn of these exports. However, it is up 8.7% on November 1997 exports.



WINE IMPORTS CLEARED FOR HOME CONSUMPTION

Original data for November show that 2.7 million litres of wine imports worth \$14.1 million was cleared for home consumption. While this volume is well below the record of 3.6 million litres of wine imports in July 1998, it is the highest value ever recorded for this series. This dollar value for November 1998 may have been influenced by fluctuations in the Australian exchange rate.



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

Original data for the September quarter 1998 shows that the wine available for consumption in Australia fell by 0.7% on the same quarter last year. Total disposals of Australian produced wine fell by 1.8% over the same period with an increase of 1.9% in exports unable to offset the 4.0% fall in domestic sales.

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
1995-96	309 463	20 256	329 719	129 671	439 134
1996-97	333 591	13 589	347 180	154 393	487 984
1997-98	338 814	25 622	364 436	192 401	531 215
September Qtr 1997	88 693	6 323	95 016	53 469	142 162
September Qtr 1998	85 109	9 224	94 333	54 464	139 573

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	46 746	41 295	868	88 909
1997-98									
November	34 559	5 911	12 576	465	18 953	4 353	3 807	66	8 226
December	34 917	6 521	12 638	478	19 638	3 857	3 156	92	7 104
January	18 719	3 652	7 495	444	11 591	2 082	1 910	42	4 035
February	22 942	4 388	9 529	525	14 442	2 829	2 414	44	5 287
March	27 282	5 041	10 741	681	16 461	3 783	2 937	54	6 775
April	28 634	5 120	10 558	418	16 096	4 286	3 494	59	7 839
May	26 568	4 552	9 833	278	14 664	4 125	3 263	73	7 461
June	27 414	4 438	10 037	385	14 861	4 270	3 716	68	8 054
1998-99									
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
SEASONALLY ADJUSTED									
1997-98									
November	28 891	4 728	10 823	n.a.	15 954	4 068	3 359	n.a.	7 520
December	27 167	4 715	10 050	n.a.	15 331	3 749	3 211	n.a.	7 105
January	29 693	5 765	11 348	n.a.	16 932	4 041	3 862	n.a.	7 707
February	26 943	4 606	10 101	n.a.	15 117	3 856	3 316	n.a.	7 231
March	27 772	4 947	10 047	n.a.	15 472	3 859	3 287	n.a.	7 571
April	30 820	5 157	10 912	n.a.	17 253	4 210	3 546	n.a.	7 761
May	27 107	4 791	10 131	n.a.	14 849	4 083	3 133	n.a.	7 156
June	28 186	5 902	9 865	n.a.	15 950	3 941	3 316	n.a.	7 685
1998-99									
July	27 718	4 955	9 748	n.a.	15 346	3 946	3 091	n.a.	6 762
August	26 497	4 038	9 785	n.a.	14 281	3 544	2 958	n.a.	6 768
September	28 966	5 180	10 567	n.a.	16 831	4 356	3 574	n.a.	7 759
October	30 491	6 248	10 468	n.a.	17 036	4 454	3 382	n.a.	7 846
November	27 900	4 934	9 766	n.a.	15 150	4 376	3 109	n.a.	7 892
TREND ESTIMATES									
1997-98									
November	28 172	4 955	10 621	n.a.	15 849	3 937	3 491	n.a.	7 437
December	28 144	4 976	10 552	n.a.	15 836	3 945	3 462	n.a.	7 431
January	28 210	4 986	10 516	n.a.	15 860	3 944	3 444	n.a.	7 447
February	28 367	5 035	10 491	n.a.	15 935	3 968	3 430	n.a.	7 486
March	28 438	5 084	10 420	n.a.	15 927	3 988	3 397	n.a.	7 497
April	28 306	5 082	10 270	n.a.	15 787	3 987	3 333	n.a.	7 444
May	28 126	5 053	10 135	n.a.	15 644	3 970	3 265	n.a.	7 343
June	27 996	5 033	10 054	n.a.	15 567	3 958	3 220	n.a.	7 254
1998-99									
July	27 986	5 051	10 036	n.a.	15 588	3 975	3 215	n.a.	7 234
August	28 102	5 087	10 054	n.a.	15 672	4 033	3 228	n.a.	7 299
September	28 332	5 146	10 087	n.a.	15 800	4 126	3 245	n.a.	7 431
October	28 575	5 224	10 114	n.a.	15 916	4 232	3 260	n.a.	7 592
November	28 961	5 308	10 172	n.a.	16 106	4 346	3 286	n.a.	7 775

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

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

(b) 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
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	278 422	24 574	22 310	8 759	1 641	2 145	963	974
1997-98								
September	22 862	2 149	1 918	745	117	165	87	88
October	23 515	1 752	2 745	660	160	173	82	75
November	27 179	2 233	3 422	1 230	182	207	106	97
December	26 741	2 090	3 899	1 634	257	197	99	121
January	15 626	1 253	1 157	379	136	125	43	55
February	19 730	1 330	1 130	401	97	130	123	58
March	23 236	1 743	1 417	590	116	148	30	71
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
1998-99								
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

(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 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	21 447	135	2 996	1 044	25 622	92 926	661	7 861
1997-98								
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	1 733	9	218	40	2 001	6 017	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	6 824	48	555
June	2 297	11	205	54	2 566	8 630	65	641
1998-99								
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	2 736	3	460	79	3 277	12 939	54	694
November	1 989	10	483	209	2 691	14 120	56	763
EXPORTS(c)								
1995-96	121 037	2 506	5 489	639	129 671	471 576	24	732
1996-97	144 892	2 490	6 046	966	154 393	603 297	17	526
1997-98	183 024	2 505	6 107	764	r 192 401	r 873 827	26	385
1997-98								
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	80 963	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	16 058	216	385	42	16 700	r79 838	2	66
1998-99								
July	15 610	198	489	77	16 374	76 509	2	10
August	16 123	226	491	102	16 941	87 493	1	13
September	r20 114	208	r 743	85	r21 149	r 107 622	2	49
October	r20 188	r 206	r 917	r49	r21 360	r 106 855	4	31
November	13 125	208	637	32	14 003	66 335	1	11

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, November
1998

Country/Region	WINE TYPE.....				TOTAL WINE.....	
	Table	Fortified	Sparkling	Other	Quantity	Value
	L	L	L	L	L	\$'000
Fiji	45 629	1 332	10 283	850	58 094	332
New Zealand	2 363 333	12 362	273 324	16 064	2 665 082	6 196
Papua New Guinea	150 068	2 017	1 829	—	153 914	262
Total Oceania and Antarctica(a)	2 643 322	16 296	307 188	16 986	2 983 791	7 101
Belgium and Luxembourg	187 530	1 350	—	—	188 880	469
France	120 510	—	477	—	120 987	554
Germany, Federal Republic of	221 803	495	—	80	222 378	1 370
Ireland	223 169	23	14 715	450	238 357	1 332
Netherlands	132 918	—	—	23	132 941	990
United Kingdom	4 740 448	87 188	180 377	3 852	5 011 865	23 705
Total European Union	5 891 915	89 168	211 787	4 405	6 197 275	29 460
Iceland	103 779	—	—	—	103 779	394
Switzerland	112 900	—	31 014	—	143 914	848
Total Europe and the Former USSR(a)	6 201 399	89 168	242 801	4 405	6 537 773	31 055
Israel	4 111	54	54	—	4 219	48
Oman	18 518	—	270	—	18 788	25
Total Middle East and North Africa(a)	25 247	54	387	—	25 688	100
Singapore	154 658	441	3 831	3 326	162 256	1 067
Thailand	86 649	35 952	3 060	1 080	126 741	291
Total Southeast Asia(a)	465 361	37 320	8 894	9 626	521 201	2 479
Hong Kong	142 565	766	20 169	540	164 039	1 032
Japan	360 091	23 207	4 312	83	387 692	2 397
Total Northeast Asia(a)	596 963	27 033	25 570	1 019	650 584	3 999
Canada	445 950	20 745	5 256	—	471 951	2 738
United States of America	2 684 573	10 402	40 985	117	2 736 076	18 558
Total Northern America(a)	3 130 523	31 147	46 241	117	3 208 027	21 296
Total Other Regions(b)	62 630	7 420	6 381	—	76 431	307
Total All Countries	13 125 444	208 437	637 462	32 152	14 003 495	66 335

(a) Includes other countries as detailed in Standard Australian Classification of Countries for Social Statistics (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
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	7 067	28 906	338	154 393
1997-98	23 382	115 654	1 266	2 830	r9 245	39 559	466	r 192 401
1997-98								
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	1 436	10 378	74	227	799	3 749	38	16 700
1998-99								
July	2 236	9 622	93	186	712	3 511	14	16 374
August	2 276	11 247	58	398	573	2 363	24	16 941
September	2 271	r13 509	6	379	839	4 120	26	r21 149
October	r2 209	r14 009	r92	r 347	r 681	r3 997	24	r21 360
November	2 984	6 538	26	521	651	3 208	76	14 003

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.

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.

EXPLANATORY NOTES

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

SELF-HELP ACCESS TO STATISTICS

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2850400011988

ISSN 0312-925X

RRP \$15.00

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Produced by the Australian Bureau of Statistics