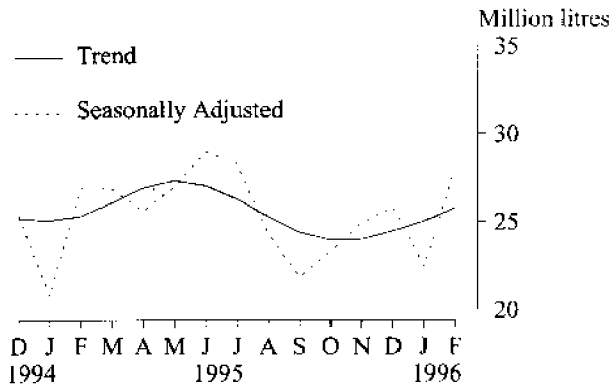


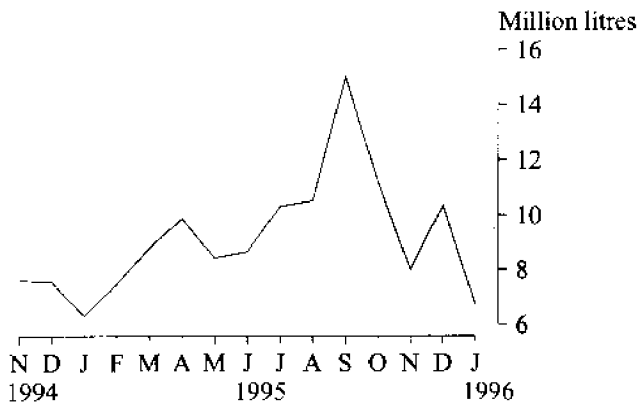
SALES OF AUSTRALIAN WINE AND BRANDY BY WINEMAKERS, FEBRUARY 1996

SUMMARY OF FINDINGS

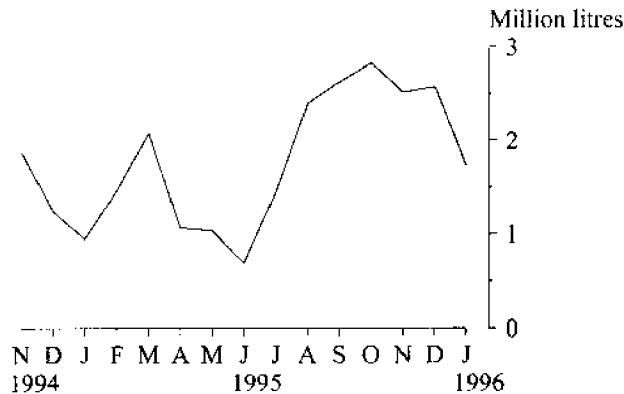
DOMESTIC SALES OF AUSTRALIAN PRODUCED WINE



EXPORTS OF AUSTRALIAN PRODUCED WINE



WINE IMPORTS



DOMESTIC SALES

The trend estimate for the total domestic sales of Australian produced wine rose by 3.0% in February. This is the fourth month of growth after five months of decline.

The seasonally adjusted estimate of total domestic sales of Australian wine for the month was 28.0 million litres, an increase of 24.7% on the previous month. It would require a fall of a similar magnitude in the seasonally adjusted estimate for March to return the trend series to decline.

In original terms, there were 23.3 million litres of Australian produced wine sold domestically during February, an increase of 60.1% on January and 3.9% on February 1995.

EXPORTS

A total of 6.7 million litres of Australian wine valued at \$26.3 million were exported in January. This quantity is the lowest since January 1995 when 6.3 million litres valued at \$18.6 million were exported.

Of these exports, the United Kingdom received 52.5%, the United States of America 9.9% and Canada 6.1%. Exports to the Oceania and Antarctica region were 440,000 litres, the lowest since January 1992.

IMPORTS

Australia imported 1.7 million litres of wine in January valued at \$4.4 million. This quantity is 32.7% less than imports in December but 81.9% more than in January 1995.

The average price per litre of wine imported in January 1996 was \$2.56 while in January 1995 it was \$4.74.

INQUIRIES

- for more information about statistics in this publication and the availability of related unpublished statistics, contact Peter Carmalt on Adelaide (08) 237 7632 or any ABS State
- 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 February		% change
	1995	1996	
	'000 L	'000 L	
White — bottles 1 litre and under	12 563	12 967	3.2
White — other containers	32 506	31 554	-2.9
<i>Total white</i>	45 069	44 521	-1.2
Red — bottles 1 litre and under	5 524	6 715	21.6
Red — other containers	5 167	6 117	18.4
<i>Total red</i>	10 691	12 832	20.0
Total table wine (includes Rosé)	56 813	58 536	3.0

During the past 3 months Australian produced white table wine sales fell by 1.2% compared with the same period 12 months ago. Other containers (mostly soft packs) fell by 2.9% whereas bottles rose by 3.2%. Sales of red table wine rose by 20.0% as a result of a 21.6% rise in bottle sales and 18.4% in other containers. Total sales of Australian produced table wine increased by 3.0%.

The volume of wine sales reported does not include any quantity of imported wine that may have been blended with the Australian product (this particularly applied to soft packs). The increasing influence of imported wine is evident in the following table.

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
1992-93	312 081	7 832	319 913
1993-94	319 534	8 341	327 875
1994-95	313 357	14 057	327 413
1995			
3 months ended January	80 289	4 073	84 362
1996			
3 months ended January	81 175	6 817	87 992

There was an increase of 4.3% in the wine available for consumption for the 3 months to February 1996 compared with the same period in 1995. There was an increase of 1.1% in the domestic sales of Australian produced wine and an increase of 67.4% in imports cleared for home consumption.

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
1992-93	312 081	102 832	414 913
1993-94	319 534	125 464	444 998
1994-95	313 357	113 663	427 020
1995			
3 months ended January	80 289	21 514	101 803
1996			
3 months ended January	81 175	25 098	106 273

There was an increase of 4.4% in the disposal of Australian produced wine for the 3 months to February 1996 compared with the same period in 1995. Exports increased by 16.7% and contributed 80.2% of the total increase in disposals.

While the amount of Australian produced wine available for disposal is affected by previous vintages and movement in stocks, domestic demand is met in part with imports, while substantial quantities of Australian wine are exported. There appears to be a move to maintain exports of Australian wine and fill the gap in the domestic demand with imported product.

TABLE 1. DOMESTIC SALES OF AUSTRALIAN WINE AND BRANDY BY WINEMAKERS

Period	Wine type						Total wine			Brandy(c)
	Table	Fortified	Sparkling	Carbonated	Flavoured (a)	Vermouth	Original	Seasonally adjusted	Trend estimate(b)	
1992-93	246,308	28,420	29,971	3,256	2,845	1,281	312,081	1,312
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
1994-95—										
December	26,610	2,467	5,899	571	213	138	35,899	25,320	25,163	111
January	10,995	1,153	970	144	109	105	13,476	20,766	25,043	89
February	19,208	1,482	1,302	238	114	82	22,425	26,921	25,311	96
March	19,996	1,818	1,798	239	159	99	24,109	26,840	26,053	87
April	19,863	2,262	1,763	162	177	81	24,309	25,559	26,911	84
May	20,150	2,612	1,571	221	225	67	24,846	26,989	27,311	98
June	23,192	2,967	1,589	319	217	99	28,382	28,968	27,047	102
1995-96—										
July	26,697	3,179	1,959	241	249	83	32,409	28,296	26,284	118
August	18,405	2,292	1,818	253	146	67	22,982	24,291	25,257	116
September	17,434	1,613	2,708	265	123	76	22,219	21,882	24,410	64
October	18,600	1,806	3,214	234	213	69	24,137	23,325	23,951	94
November	22,927	2,476	3,935	335	223	160	30,055	24,947	24,025	104
December	27,269	2,588	5,888	468	220	126	36,559	25,812	24,470	136
January	11,984	1,119	1,139	149	108	62	14,561	22,450	25,036	90
February	19,283	1,673	1,902	236	126	89	23,310	28,000	25,781	n.y.a.

(a) Includes wine cocktails, marsala, aperitif and tonic wines. (b) Trend estimates for the most recent months are provisional and can be revised as data for additional months become available. (c) Quantities on which excise duty was paid.

TABLE 2. DOMESTIC SALES OF AUSTRALIAN FORTIFIED AND SPARKLING WINE AND VERMOUTH BY WINEMAKERS ('000 litres)

Period	Fortified wine						Sparkling wine(a)		Vermouth	
	Sherry		Dessert wine			Other (c)	Bottle fermentation	Bulk fermentation	Dry	Sweet
	Dry	Medium (b)	Sweet	Port	Muscat					
1992-93	2,117	2,500	6,829	15,545	1,257	172	25,252	4,719	581	700
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
1994-95—										
December	156	202	502	1,482	105	18	5,157	743	n.p.	n.p.
January	70	133	251	642	46	11	774	196	n.p.	n.p.
February	138	154	388	724	66	11	1,033	269	33	49
March	123	149	425	1,063	56	3	1,453	345	44	55
April	144	185	482	1,346	88	17	1,480	283	38	43
May	178	229	576	1,516	99	15	1,276	294	26	41
June	186	223	615	1,805	123	15	1,307	281	44	56
1995-96—										
July	218	292	649	1,891	120	10	1,568	391	39	44
August	214	257	505	1,215	92	9	1,504	314	28	39
September	118	146	325	953	64	8	2,011	696	35	42
October	140	154	419	1,003	81	8	2,454	760	30	39
November	159	224	583	1,397	102	11	3,012	923	n.p.	n.p.
December	166	211	522	1,586	92	11	4,503	1,385	n.p.	n.p.
January	79	106	286	594	47	7	810	329	24	37
February	119	151	380	947	70	6	1,325	577	38	52

(a) Spritzig table wines are included with table wine. (b) Includes semi-sweet and medium dry. (c) Includes madeira, tokay, white port.

TABLE 3. DOMESTIC SALES OF AUSTRALIAN TABLE WINE BY CONTAINER TYPE
(*000 litres)

Period	WHITE WINE NOT EXCEEDING 1 DEGREE BAUMÉ(a)					WHITE WINE EXCEEDING 1 DEGREE BAUMÉ(a)				
	Glass containers					Glass containers				
	<i>1 litre and under</i>	<i>Over 1 litre</i>	<i>Soft pack(b)</i>	<i>Bulk(c)</i>	<i>Total</i>	<i>1 litre and under</i>	<i>Over 1 litre</i>	<i>Soft pack(b)</i>	<i>Bulk(c)</i>	<i>Total</i>
1992-93	41,243	1,319	120,534	4,784	167,880	2,856	203	15,405	61	18,525
1993-94	45,025	1,146	117,172	5,145	168,488	3,110	179	20,590	87	23,967
1994-95	49,063	964	110,435	3,730	164,192	2,794	n.p.	18,888	n.p.	21,970
1994-95—										
December	5,681	111	11,997	687	18,477	394	n.p.	2,043	n.p.	2,470
January	2,324	68	4,893	301	7,586	159	29	890	7	1,085
February	3,775	82	9,603	234	13,693	230	n.p.	1,512	n.p.	1,758
March	4,023	69	9,012	212	13,317	188	18	1,657	12	1,874
April	3,978	64	8,859	193	13,094	195	n.p.	1,361	n.p.	1,577
May	3,892	64	8,914	195	13,065	189	n.p.	1,360	n.p.	1,572
June	4,321	79	10,393	172	14,966	220	n.p.	1,710	n.p.	1,960
1995-96—										
July	4,246	65	12,022	270	16,602	274	n.p.	1,702	n.p.	1,999
August	3,328	56	7,065	321	10,770	200	n.p.	1,276	n.p.	1,498
September	3,502	53	7,005	233	10,793	176	n.p.	1,340	n.p.	1,532
October	4,126	62	7,668	245	12,101	209	n.p.	1,389	n.p.	1,616
November	5,040	82	9,369	284	14,775	231	n.p.	1,675	n.p.	1,928
December	5,846	80	11,592	486	18,005	361	22	1,991	14	2,388
January	2,434	38	5,400	215	8,088	159	n.p.	1,011	n.p.	1,184
February	3,969	57	8,724	280	13,031	198	n.p.	1,608	n.p.	1,825

For footnotes see end of table.

TABLE 3. DOMESTIC SALES OF AUSTRALIAN TABLE WINE BY CONTAINER TYPE - continued
(*000 litres)

Period	RED					ROSÉ				
	Glass containers					Glass containers				
	<i>1 litre and under</i>	<i>Over 1 litre</i>	<i>Soft pack(b)</i>	<i>Bulk(c)</i>	<i>Total</i>	<i>1 litre and under</i>	<i>Over 1 litre</i>	<i>Soft pack(b)</i>	<i>Bulk(c)</i>	<i>Total</i>
1992-93	25,268	464	28,677	642	55,051	n.p.	118	4,107	n.p.	4,852
1993-94	27,575	444	28,399	942	57,359	578	n.p.	4,178	n.p.	4,888
1994-95	30,013	591	29,453	576	60,633	570	116	4,094	12	4,792
1994-95—										
December	2,653	54	2,409	32	5,149	84	n.p.	418	n.p.	514
January	1,153	21	940	13	2,128	30	n.p.	156	n.p.	197
February	1,718	36	1,634	26	3,414	39	n.p.	294	n.p.	343
March	2,428	35	1,942	23	4,429	45	n.p.	320	n.p.	376
April	2,587	50	2,151	23	4,810	52	n.p.	320	n.p.	382
May	2,554	51	2,485	50	5,140	28	n.p.	334	n.p.	374
June	3,288	87	2,331	77	5,783	40	n.p.	432	n.p.	484
1995-96—										
July	3,893	41	3,474	37	7,445	62	n.p.	581	n.p.	651
August	2,964	43	2,737	46	5,790	38	n.p.	297	n.p.	347
September	2,422	50	2,282	32	4,786	37	n.p.	278	n.p.	323
October	2,485	42	2,002	21	4,549	46	n.p.	279	n.p.	334
November	2,957	39	2,792	13	5,800	n.p.	7	361	n.p.	424
December	3,007	45	3,175	46	6,272	n.p.	12	510	n.p.	603
January	1,343	25	1,093	11	2,472	28	n.p.	206	n.p.	241
February	2,365	27	1,679	17	4,088	40	n.p.	291	n.p.	339

(a) 1 degree baumé = 18 grams of sugar per litre. (b) Soft pack containers include all collapsible packs, plastic or otherwise. (c) Bulk includes rigid containers (plastic, steel, wood), tankers and cans.

TABLE 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
	'000L	'000L	'000L	'000L	'000L	\$ '000	'000L ai	\$ '000
IMPORTS CLEARED								
1992-93	4,833	106	2,346	546	7,832	46,984	629	8,085
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
<i>1994-95—</i>								
November	1,134	38	601	104	1,876	8,738	69	790
December	642	49	356	199	1,246	7,384	76	1,043
January	663	20	212	55	951	4,508	36	564
February	1,109	4	267	81	1,461	4,256	44	563
March	1,780	9	216	68	2,072	4,482	32	420
April	669	10	323	65	1,066	5,417	34	412
May	796	17	149	71	1,034	4,673	52	570
June	497	9	104	78	688	3,897	31	461
<i>1995-96—</i>								
July	1,206	4	131	99	1,440	3,975	46	556
August	2,109	5	193	90	2,396	5,369	50	675
September	2,293	7	253	74	2,627	6,219	44	651
October	2,349	23	419	36	2,827	7,432	43	618
November	r1,819	14	568	117	r2,518	r8,133	68	786
December	2,158	9	319	84	2,570	r8,070	53	925
January	1,495	5	175	54	1,730	4,427	54	637
EXPORTS(a)								
1992-93	95,468	1,851	4,730	784	102,832	293,157	73	850
1993-94	116,655	2,873	5,042	893	125,464	366,574	36	524
1994-95	105,541	2,475	5,109	537	r113,663	r385,702	36	812
<i>1994-95—</i>								
November	7,102	115	354	46	7,617	26,659	1	36
December	7,026	247	269	23	7,565	23,606	7	106
January	r5,882	73	343	34	r6,333	r18,630	—	2
February	r6,907	219	328	27	r7,481	r25,410	3	47
March	8,324	137	294	r34	8,789	r32,211	3	104
April	9,131	171	508	71	9,882	35,723	3	46
May	7,879	137	382	41	8,439	31,243	5	102
June	8,046	171	350	96	8,663	r32,466	—	16
<i>1995-96—</i>								
July	9,587	159	528	44	r10,318	r39,025	3	102
August	9,777	280	403	53	10,513	36,616	3	73
September	14,023	233	719	56	15,031	51,389	2	26
October	r10,264	311	r571	68	r11,214	r41,124	—	8
November	r7,364	187	398	69	r8,018	r27,737	2	84
December	r9,745	170	r396	38	r10,350	r40,454	2	59
January	6,185	262	247	36	6,730	26,298	9	60

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

TABLE 5. EXPORTS OF AUSTRALIAN WINE BY COUNTRY OF DESTINATION, JANUARY 1996

Country/Region	Wine type				Total wine	
	Table	Fortified	Sparkling (Litres)	Other	Quantity	Value (\$'000)
New Zealand	330,393	8,575	22,212	2,680	363,860	1,136
Papua New Guinea	19,270	1,430	1,464	—	22,164	109
Vanuatu	30,705	—	315	—	31,020	60
<i>Total Oceania & Antarctica(a)</i>	<i>397,641</i>	<i>10,311</i>	<i>29,006</i>	<i>2,775</i>	<i>439,733</i>	<i>1,409</i>
Denmark	77,478	22	—	—	77,500	224
Finland	18,540	—	—	—	18,540	45
Germany	244,488	5,076	4,950	—	254,514	852
Ireland	156,966	—	1,278	—	158,244	715
Netherlands	93,474	9,225	—	—	102,699	452
Norway	70,980	—	—	—	70,980	241
Sweden	159,453	—	117	—	159,570	560
Switzerland	123,916	—	5,958	6,552	136,426	874
United Kingdom	3,289,957	69,270	164,261	10,136	3,533,624	12,287
<i>Total Europe & the Former USSR(a)</i>	<i>4,263,469</i>	<i>83,593</i>	<i>176,564</i>	<i>16,688</i>	<i>4,540,314</i>	<i>16,378</i>
United Arab Emirates	41,095	240	4,815	—	46,150	95
<i>Total Middle East & North Africa</i>	<i>41,095</i>	<i>240</i>	<i>4,815</i>	<i>—</i>	<i>46,150</i>	<i>95</i>
Indonesia	61,807	90,027	225	—	152,059	375
Singapore	69,965	931	2,228	3,269	76,393	401
Thailand	94,779	1,350	1,458	—	97,587	427
<i>Total Southeast Asia(a)</i>	<i>266,440</i>	<i>92,308</i>	<i>10,496</i>	<i>4,061</i>	<i>373,305</i>	<i>1,424</i>
Hong Kong	45,919	1,215	8,613	1,422	57,169	308
Japan	120,084	27,897	8,928	11,484	168,393	756
Taiwan	3,186	—	—	—	3,186	56
<i>Total Northeast Asia(a)</i>	<i>170,539</i>	<i>29,112</i>	<i>17,541</i>	<i>12,906</i>	<i>230,098</i>	<i>1,128</i>
Canada	377,944	34,152	—	—	412,096	2,053
USA	645,034	11,341	7,364	48	663,787	3,668
<i>Total Northern America</i>	<i>1,022,978</i>	<i>45,493</i>	<i>7,364</i>	<i>48</i>	<i>1,075,883</i>	<i>5,720</i>
<i>Total Other Regions(b)</i>	<i>23,185</i>	<i>1,056</i>	<i>756</i>	<i>—</i>	<i>24,997</i>	<i>143</i>
<i>Total All Countries</i>	<i>6,185,347</i>	<i>262,113</i>	<i>246,542</i>	<i>36,478</i>	<i>6,730,480</i>	<i>26,298</i>

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

TABLE 6 : EXPORTS OF AUSTRALIAN WINE BY REGION(a)
(¹000 litres)

Period	Oceania & Antarctica	Europe & the Former USSR	Middle East & North Africa	Southeast Asia	Northeast Asia	Northern America	Other	Total all Regions
1992-93	18,251	61,623	799	1,969	3,483	16,356	351	102,832
1993-94	24,968	73,334	952	2,134	5,268	18,463	346	125,464
1994-95	17,144	69,782	1,014	r2,197	4,307	18,786	434	r113,663
1994-95—								
November	1,537	3,285	80	280	658	1,651	124	7,617
December	1,530	3,959	73	236	396	1,362	9	7,565
January	1,366	3,636	55	106	262	905	2	r6,333
February	1,602	4,002	62	200	277	1,303	35	r7,481
March	980	5,692	179	166	173	1,552	47	8,789
April	743	6,818	31	115	541	1,610	23	9,882
May	815	5,241	141	251	212	1,743	36	8,439
June	945	5,415	88	144	253	1,780	39	8,663
1995-96—								
July	r1,210	6,428	92	227	544	1,807	10	r10,318
August	1,387	6,568	—	157	219	2,163	19	10,513
September	1,803	10,334	157	246	330	2,154	7	15,031
October	r821	r7,931	20	r194	448	r1,758	43	r11,214
November	1,993	4,016	94	417	392	r1,092	14	r8,018
December	r707	r6,674	61	r335	371	r2,197	4	r10,350
January	440	4,540	46	373	230	1,076	25	6,730

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

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 exports and import clearances 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 97% 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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