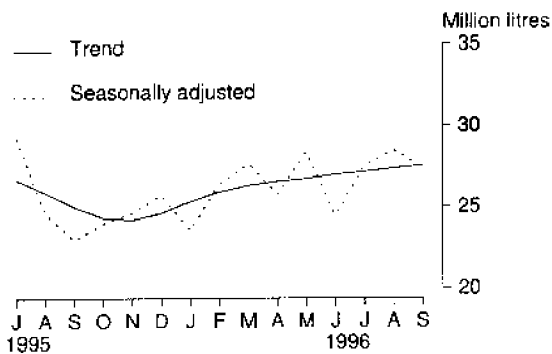


CATALOGUE NO. 8504.0
EMBARGOED UNTIL 11.30 AM 7 NOVEMBER 1996

SALES OF AUSTRALIAN WINE AND BRANDY BY WINEMAKERS, SEPTEMBER 1996

SUMMARY OF FINDINGS

DOMESTIC SALES OF AUSTRALIAN PRODUCED WINE



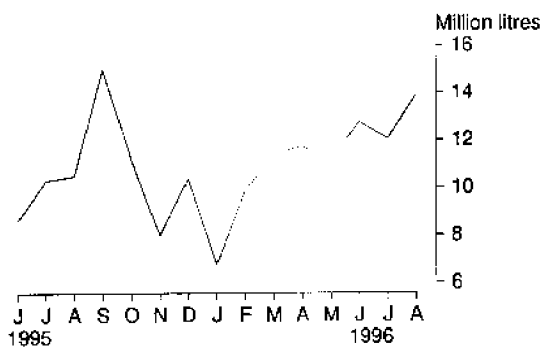
DOMESTIC SALES

The trend estimate for the total domestic sales of Australian produced wine rose by 0.7% in September. As a result of the regular seasonal re-analysis, the seasonally adjusted and trend series in this publication have been revised.

The seasonally adjusted estimate of total domestic sales of Australian produced wine for the month was 27.4 million litres, an fall of 3.8% on the previous month. Despite this fall, the trend series continues to record steady growth. The trend will continue to grow unless the October seasonally adjusted estimate falls by more than 5.5%.

In original terms, there were 27.2 million litres of Australian produced wine sold domestically during September, a decrease of 1.3% on August but 20.8% more than September 1995.

EXPORTS OF AUSTRALIAN PRODUCED WINE

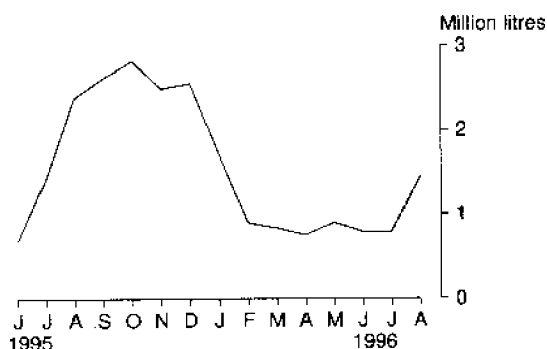


EXPORTS

A total of 13.9 million litres of Australian wine valued at \$52.1 million were exported in August. This quantity is an increase of 12.7% on July and an increase of 32.0% on August 1995.

Exports to the United Kingdom were 7.0 million litres of wine at a value of \$24.6 million. This volume represents 50.7% of the total August exports.

WINE IMPORTS CLEARED FOR HOME CONSUMPTION



IMPORTS CLEARED FOR HOME CONSUMPTION

Australia cleared 1.5 million litres of imported wine for home consumption in August, an increase of 84.0% on July but down 39.4% on August 1995. The value of the imports cleared was \$5.8 million, an increase of 56.0% on the previous month.

The average price per litre of wine imports cleared for home consumption was \$3.99 in August compared with \$4.71 in July.

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 September		% change
	1995	1996	
	'000 L	'000 L	
White — bottles 1 litre and under	12 018	13 577	13.0
White — other containers	32 289	33 096	2.5
<i>Total white</i>	44 307	46 673	5.3
Red — bottles 1 litre and under	9 427	11 252	19.4
Red — other containers	8 865	10 168	14.7
<i>Total red</i>	18 292	21 420	17.1
Total table wine (Includes Rosé)	63 914	69 346	8.5

Total sales of Australian produced table wine rose by 8.5% in the past 3 months compared with the same period 12 months ago. Red table wine sales rose by 17.1% with a 19.4% rise in bottle sales and a 14.7% rise in sales of other containers (mostly soft packs). White table wine sales rose by 5.3% with bottles up 13.0% and other containers up 2.5%.

The volume of wine sales reported above does not include any quantity of imported wine that may have been blended with the Australian product and this has particularly applied to wine sold in other containers.

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
1995			
3 months ended August	85 113	4 524	89 637
1996			
3 months ended August	81 566	3 032	84 598

There was a decrease of 5.0 million litres or 5.6% in the wine available for consumption for the 3 months to August compared with the same period in 1995. This decrease is a result of a fall of 4.2% in the domestic sales of Australian produced wine combined with a fall of 33.0% 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
1993-94	319 534	125 464	444 998
1994-95	313 357	113 663	427 020
1995-96	309 462	129 480	438 942
1995			
3 months ended August	85 113	29 495	114 608
1996			
3 months ended August	81 566	39 258	120 824

There was an increase of 6.2 million litres or 5.4% in the disposal of Australian produced wine for the 3 months to August 1996 compared with the same period in 1995. The decrease of 3.5 million litres (4.2%) in the domestic sales of Australian produced wine was offset by an increase of 9.8 million litres (33.1%) in exports.

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DOMESTIC SALES OF AUSTRALIAN WINE AND BRANDY BY WINEMAKERS

Period	Wine type						Total wine			
	Table	Fortified	Spark- ling	Carbon- ated	Flavoured ¹	Vermouth	Original	Seasonally adjusted ²	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
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	r247 274	r25 865	r30 148	r3 089	2 087	999	r309 462	1 113
1995-96—										
July	r27 201	3 179	r2 061	241	249	83	r33 016	29 315	26 716	118
August	r19 036	2 292	r1 920	253	146	67	r23 715	24 586	25 888	116
September	r17 676	r1 607	r2 737	r270	123	76	r22 490	22 980	25 008	64
October	r19 012	1 806	3 214	234	213	69	r24 548	24 024	24 369	94
November	r22 745	r2 473	r3 983	335	223	160	r29 918	24 703	24 209	104
December	r27 378	r2 587	r5 890	468	220	126	r36 670	25 734	24 635	136
January	r11 962	1 119	1 139	149	108	62	r14 539	23 593	25 355	90
February	r19 213	1 673	1 902	236	126	89	r23 241	26 423	25 964	84
March	r21 558	1 863	1 928	276	151	68	r25 845	27 682	26 342	50
April	r19 990	2 197	1 850	150	165	48	r24 400	25 765	26 593	81
May	r22 417	2 734	2 060	248	209	81	r27 750	28 392	26 796	96
June	r19 083	2 333	r1 465	227	153	70	r23 331	24 479	26 978	83
1996-97—										
July	r25 043	r3 070	r2 014	244	238	123	r30 732	27 554	27 168	109
August	r22 614	r2 160	r2 254	199	205	71	r27 503	28 495	27 361	104
September	21 690	1 872	3 059	322	152	64	27 159	27 415	27 562	n.y.a.

¹ Includes wine cocktails, marsala, aperitif and tonic wines.

² As a result of a regular seasonal re-analysis the seasonally adjusted and trend series in this publication have been revised.

³ Quantities on which excise duty was paid.

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DOMESTIC SALES OF AUSTRALIAN FORTIFIED AND SPARKLING WINE AND VERMOUTH BY WINEMAKERS

Period	Fortified wine						Sparkling wine ¹		Vermouth	
	Sherry			Dessert wine			Bottle fermen- tation	Bulk fermen- tation	Dry	Sweet
	Dry	Medium	Sweet	Port	Muscat	Other ³				
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	r1 785	r2 291	r5 592	15 096	1 003	98	r22 923	r7 226	440	559
1995-96—										
July	218	292	649	1 891	120	10	r1 671	391	39	44
August	214	257	505	1 215	92	9	r1 606	314	28	39
September	r115	r144	r322	r954	64	8	r2 041	696	35	42
October	140	154	419	1 003	81	8	2 454	760	30	39
November	159	224	r582	r1 395	102	11	r3 059	923	n.p.	n.p.
December	166	211	522	r1 585	92	11	4 503	r1 387	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
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	r1 108	r357	30	40
1996-97—										
July	190	283	654	r1 802	132	9	r1 544	470	56	67
August	130	168	364	r1 388	r101	r10	r1 609	644	31	40
September	115	160	359	1 145	89	5	2 118	941	36	28

¹ Spritzig table wines are included with table wine.

² Includes semi-sweet and medium dry.

³ Includes madeira, tokay and white port.

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DOMESTIC SALES OF AUSTRALIAN TABLE WINE BY CONTAINER TYPE

Period	WHITE WINE NOT EXCEEDING 1 DEGREE BAUMÉ ¹					WHITE WINE EXCEEDING 1 DEGREE BAUMÉ ¹				
	Glass containers					Glass containers				
	1 litre and under	Over 1 litre	Soft pack ²	Bulk ³	Total	1 litre and under	Over 1 litre	Soft pack ²	Bulk ³	Total
	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L
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
1995-96	r48 033	r657	r106 049	r2 861	r157 601	r2 553	137	r18 306	112	r21 109
1995-96—										
July	r4 334	65	r12 326	270	r16 994	274	n.p.	1 702	n.p.	1 999
August	r3 498	56	r7 498	r203	r11 255	200	n.p.	1 276	n.p.	1 498
September	r3 537	53	r7 245	233	r11 068	176	n.p.	r1 299	n.p.	r1 492
October	r4 135	62	r8 016	245	r12 458	209	n.p.	1 389	n.p.	1 616
November	r4 811	r74	r9 629	284	r14 796	r230	n.p.	1 675	n.p.	r1 927
December	r5 903	r71	r11 606	486	r18 067	r351	22	1 991	14	r2 378
January	r2 431	r32	5 400	215	r8 078	r153	n.p.	1 011	n.p.	r1 178
February	r3 927	r51	8 724	280	r12 982	198	n.p.	1 608	n.p.	1 825
March	r4 225	r50	9 435	159	r13 869	158	11	1 735	8	1 912
April	r3 929	r46	8 607	152	r12 734	229	n.p.	1 393	n.p.	1 640
May	r3 997	r53	9 588	161	r13 799	221	9	1 771	11	2 012
June	r3 307	r45	7 976	173	r11 500	r155	n.p.	1 457	n.p.	r1 630
1996-97—										
July	r4 281	r55	9 972	171	r14 480	190	n.p.	1 672	n.p.	1 884
August	r4 375	r42	8 703	186	r13 306	r202	n.p.	1 624	n.p.	r1 847
September	4 275	47	8 790	209	13 321	254	n.p.	1 559	n.p.	1 836
	RED					ROSE				
	Glass containers					Glass containers				
	1 litre and under	Over 1 litre	Soft pack ²	Bulk ³	Total	1 litre and under	Over 1 litre	Soft pack ²	Bulk ³	Total
	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L	'000 L
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
1995-96	r33 172	r420	r29 964	313	r63 869	535	n.p.	r4 056	n.p.	r4 695
1995-96—										
July	r3 956	r42	r3 522	37	r7 557	62	n.p.	581	n.p.	651
August	r3 038	r44	r2 808	46	r5 937	38	n.p.	297	n.p.	347
September	r2 433	50	r2 284	32	r4 799	37	n.p.	r272	n.p.	r317
October	2 485	42	r2 057	21	r4 604	46	n.p.	279	n.p.	334
November	r2 816	39	r2 740	13	r5 608	n.p.	7	r351	n.p.	r414
December	r3 019	r36	r3 229	46	r6 330	n.p.	12	510	n.p.	603
January	1 343	r18	1 093	11	r2 465	28	n.p.	206	n.p.	241
February	2 365	r19	r1 666	17	r4 067	40	n.p.	291	n.p.	339
March	2 944	r29	2 443	18	r5 434	37	n.p.	299	n.p.	343
April	2 992	r31	2 226	18	r5 266	n.p.	n.p.	307	n.p.	351
May	3 139	r43	2 988	31	r6 200	n.p.	7	356	n.p.	407
June	r2 644	r28	2 908	24	r5 604	36	n.p.	307	n.p.	349
1996-97—										
July	r4 281	r36	r3 800	29	r8 146	49	n.p.	475	n.p.	533
August	r3 801	r39	r3 214	24	r7 079	37	n.p.	338	n.p.	382
September	3 170	27	2 961	39	6 196	37	n.p.	294	n.p.	337

¹ 1 degree baumé= 18 grams of sugar per litre.

² Soft pack containers include all collapsible packs, plastic or otherwise.

³ Bulk includes rigid containers (plastic, steel, wood), tankers and cans.

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 CLEARED¹								
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
1994-95—								
June	497	9	104	78	688	3 897	31	461
1995-96—								
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	1 799	14	568	117	2 498	8 126	68	786
December	2 152	9	319	84	2 564	8 064	53	926
January	1 483	5	175	54	1 718	4 422	54	637
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	1 266	10	96	80	1 452	5 796	58	727
EXPORTS²								
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	r120 860	2 504	r5 478	r638	r129 480	r470 694	r23	r729
1994-95—								
June	8 046	171	350	96	8 663	32 467	—	16
1995-96—								
July	9 587	159	528	44	10 318	r39 027	3	102
August	9 778	280	403	53	10 514	36 619	3	73
September	14 023	233	719	56	15 031	51 391	2	26
October	10 264	311	571	68	11 214	41 125	—	8
November	7 364	187	398	69	8 018	27 716	2	84
December	r9 768	170	396	38	r10 373	r40 613	3	83
January	6 237	262	254	37	6 790	26 579	3	60
February	r9 185	154	491	44	r9 875	r34 871	1	62
March	10 585	326	456	63	11 430	42 322	1	62
April	11 176	121	390	43	11 730	41 217	—	7
May	r10 584	137	335	60	r11 117	r41 124	2	95
June	r12 307	164	r537	r63	r13 071	r48 091	r4	r67
1996-97—								
July	r11 563	r174	522	51	r12 310	r45 025	—	18
August	12 843	356	624	54	13 877	52 086	3	79

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.

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EXPORTS OF AUSTRALIAN WINE BY COUNTRY OF DESTINATION, AUGUST 1996

Country/region	Wine type				Total wine	
	Table	Fortified	Sparkling	Other	Quantity	Value
	litres	litres	litres	litres	litres	\$'000
Fiji	26 936	135	5 250	2 034	34 355	229
New Zealand	1 067 989	27 010	25 596	2 250	1 122 845	2 695
Vanuatu	33 535	360	1 755	90	35 740	81
<i>Total Oceania and Antarctica¹</i>	1 155 698	28 387	34 199	4 779	1 223 063	3 112
Denmark	206 724	864	—	—	207 588	838
Germany, Federal Republic of	236 930	—	918	—	237 848	1 220
Ireland	238 499	—	4 958	—	243 457	999
Netherlands	155 716	—	71 706	—	227 422	972
Norway	308 985	—	—	—	308 985	1 022
Sweden	376 822	450	8 100	—	385 372	1 238
Switzerland	173 513	—	12 150	9 426	195 089	698
United Kingdom	6 459 733	129 909	422 506	18 486	7 030 634	24 588
<i>Total Europe and the Former USSR¹</i>	8 509 509	131 763	520 788	28 249	9 190 309	32 829
Bahrain	17 680	—	—	—	17 680	22
United Arab Emirates	17 960	—	11 700	369	30 029	45
<i>Total Middle East and North Africa¹</i>	35 640	—	11 700	369	47 709	67
Singapore	75 701	698	3 452	2 215	82 066	479
Thailand	124 598	1 373	4 860	—	130 831	548
<i>Total Southeast Asia²</i>	267 346	2 071	14 591	12 088	296 096	1 450
Japan	136 969	450	4 752	7 434	149 605	626
Korea, Republic of	111 576	—	—	—	111 576	229
<i>Total Northeast Asia¹</i>	349 677	2 430	23 096	8 631	383 834	1 624
Canada	762 049	176 359	15 579	—	953 987	3 643
USA	1 749 438	14 474	3 222	—	1 767 134	9 272
<i>Total Northern America</i>	2 511 487	190 833	18 801	—	2 721 121	12 915
<i>Total Other Regions²</i>	13 600	72	996	—	14 668	90
Total all Countries	12 842 957	355 556	624 171	54 116	13 876 800	52 086

¹ Includes other countries as detailed in *Australian Standard Classification of Countries for Social Statistics* (1269.0). ² Includes ships' stores.

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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	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	r14 649	r83 825	946	r3 517	r4 430	r21 862	250	r129 480
1994-95—								
June	945	5 415	88	144	253	1 780	39	8 663
1995-96—								
July	1 210	6 428	92	227	544	1 807	10	10 318
August	1 387	6 568	—	157	219	2 163	19	10 514
September	1 803	10 334	157	246	330	2 154	7	15 031
October	821	7 931	20	194	448	1 758	43	11 214
November	1 993	4 016	94	417	392	1 092	14	8 018
December	707	r6 686	61	335	371	2 208	4	r10 373
January	441	4 582	46	376	238	1 081	25	6 790
February	r1 779	5 821	119	327	410	1 402	16	r9 875
March	1 399	6 816	99	339	421	2 319	36	11 430
April	1 238	7 599	100	416	321	2 023	33	11 730
May	r937	7 484	125	249	r333	1 958	30	r11 117
June	r934	r9 560	33	r234	402	r1 897	12	r13 071
1996-97—								
July	r1 691	r7 497	117	r312	r277	r2 377	38	r12 310
August	1 223	9 190	48	296	384	2 721	15	13 877

¹ 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 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 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

W. McLennan
Australian Statistician

For more information . . .

The ABS publishes a wide range of statistics and other information on Australia's economic and social conditions. Details of what is available in various publications and other products can be found in the ABS Catalogue of Publications and Products available from all ABS Offices.

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