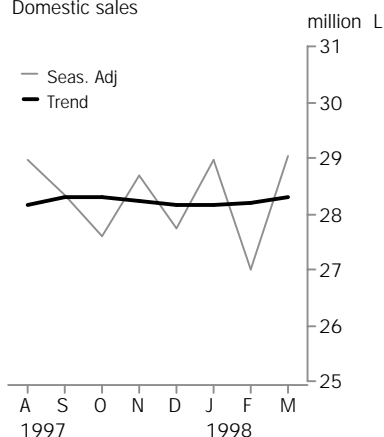


SALES OF AUSTRALIAN WINE AND BRANDY BY WINEMAKERS

EMBARGO: 11:30AM (CANBERRA TIME) FRI 8 MAY 1998

Australian produced wine

Domestic sales



MARCH KEY FIGURES

TREND ESTIMATES

	Mar 98 '000 L	% change Feb 98 to Mar 98	% change Mar 97 to Mar 98
Australian produced wine			
Domestic wine sales	28 290	0.3	0.4
White table wine sales	15 746	-0.1	3.6
Red and rosé table wine sales	7 286	0.2	-5.3

SEASONALLY ADJUSTED

	Mar 98 '000 L	% change Feb 98 to Mar 98	% change Mar 97 to Mar 98
Australian produced wine			
Domestic wine sales	29 041	7.6	0.7
White table wine sales	15 669	3.6	-0.8
Red and rosé table wine sales	7 363	3.2	-2.0

MARCH KEY POINTS

TREND ESTIMATES

- The trend estimate for total domestic sales of Australian produced wine rose by 0.3% in March. It is 0.4% higher than March 1997.
- The trend for white table wine fell marginally by 0.1% in March. However, it is 3.6% higher than March 1997.
- Although the trend for red/rosé table wine increased by 0.2% in March, it is 5.3% lower than the level recorded in March 1997. This fall can be attributed to a decrease in the soft pack component of this category.

SEASONALLY ADJUSTED ESTIMATES

- The seasonally adjusted estimate for total domestic sales of Australian produced wine for March was 29.0 million litres, up 7.6% on the previous month.
- The seasonally adjusted estimates for both white and red/rosé table wines rose in March, although both were lower than their respective March 1997 estimates.

ORIGINAL ESTIMATES

- In original terms, there were 27.3 million litres of Australian produced wine sold domestically by winemakers during March. This is 18.9% up on February 1998 and 1.3% up on March 1997.

- 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>
April 1998	3 June 1998
May 1998	3 July 1998
June 1998	3 August 1998

CHANGES IN THIS ISSUE

The data for red/rosé table wine in soft packs has been revised from November 1997 to February 1998. The revised estimates are all lower than previously published and will have a flow-on effect for total red/rosé table wine, total table wine and total wine.

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 in bottles have recorded growth over the past few years, with white up 16.7% and red/rosé up 48.7% since March 1995.

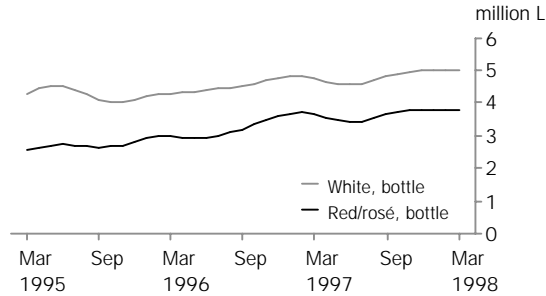
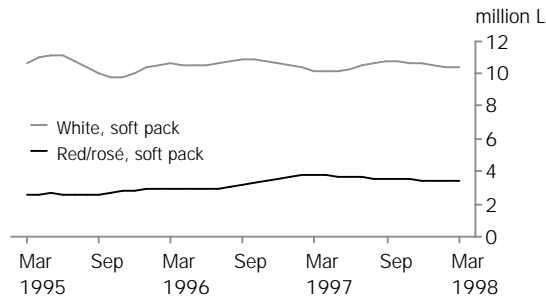


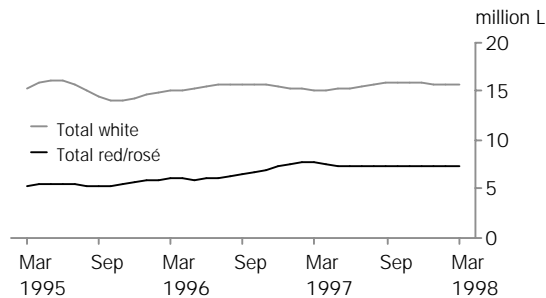
TABLE WINE, SOFT PACK CONTAINERS

Trend estimates for white table wine in soft packs has remained relatively stable over the past few years. However, red/rosé soft pack sales have been in decline for the last 12 months after a long period of growth. This decline appears to be partly due to some winemakers blending imported wine (excluded from this collection) with the Australian made product.



TOTAL WHITE AND RED/ROSE TABLE WINE

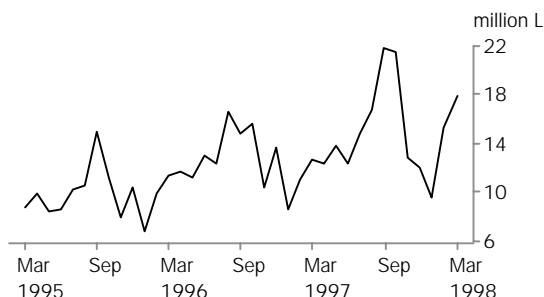
The trend estimates for the domestic sales of total white table wine has shown little change over the past few years. Trend estimates for total red/rosé table wine appear to have flattened during the past year, influenced by the reduced Australian produced wine content in soft packs.



EXPORTS OF AUSTRALIAN PRODUCED WINE AND IMPORTS

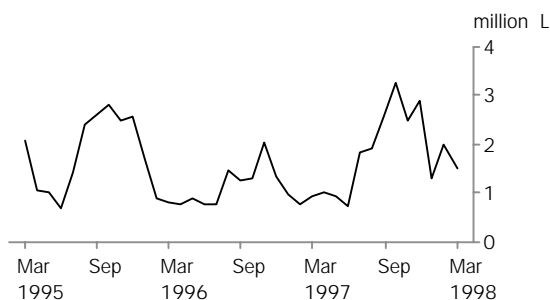
EXPORTS OF AUSTRALIAN PRODUCED WINE

Following the seasonal lull during the Christmas period, exports of Australian produced wine have reached record levels for February and March.



WINE IMPORTS CLEARED FOR HOME CONSUMPTION

Original data for the financial year to date shows that 19.8 million litres of wine have been imported, on target to exceed the previous record of 20.3 million litres in 1995-96.



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

Original data for the March quarter 1998 show that the wine available for consumption in Australia has increased by 1.7% on the same quarter in 1997. An increase in imported wine has been partly offset by a fall in the domestic sales of Australian wine. Total disposals of Australian wine recorded a 9.5% increase over the same period, driven by a 32.8% increase in wine exports.

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	14 057	327 413	113 663	427 020
1995-96	309 462	20 256	329 717	129 671	439 133
1996-97	333 590	13 589	347 178	154 395	487 985
March Qtr 1997	69 851	2 685	72 536	32 278	102 129
March Qtr 1998	68 943	4 809	73 752	42 876	111 819

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

Period	TABLE-WHITE WINE.....					TABLE-RED AND ROSÉ 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									
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	r 34 559	5 911	12 576	465	18 953	4 098	r 3 807	66	r 7 970
December	r 34 917	6 521	12 638	478	19 638	3 668	r 3 156	92	r 6 916
January	r 18 719	3 652	7 495	444	11 591	2 001	r 1 910	42	r 3 955
February	r 22 942	4 388	9 529	525	14 442	2 758	r 2 414	44	r 5 217
March	27 282	5 041	10 741	681	16 461	3 681	2 937	54	6 673
SEASONALLY ADJUSTED									
1996-97									
January	28 163	5 086	10 671	n.a.	15 676	4 251	3 675	n.a.	7 931
February	29 307	5 146	10 399	n.a.	15 575	4 364	4 030	n.a.	8 434
March	28 849	4 699	10 806	n.a.	15 802	3 554	3 588	n.a.	7 516
April	27 762	4 500	9 512	n.a.	14 544	3 498	3 787	n.a.	7 374
May	27 631	4 711	10 296	n.a.	15 265	3 595	3 707	n.a.	7 634
June	26 747	4 020	10 133	n.a.	14 683	3 006	3 780	n.a.	7 054
1997-98									
July	28 630	4 835	9 907	n.a.	15 667	3 459	3 416	n.a.	6 987
August	28 950	4 858	11 956	n.a.	16 455	3 591	3 605	n.a.	7 345
September	28 335	4 923	10 463	n.a.	15 504	3 806	3 849	n.a.	7 558
October	27 605	5 032	10 396	n.a.	15 855	3 859	3 527	n.a.	7 467
November	28 693	4 705	10 883	n.a.	15 898	3 854	3 332	n.a.	7 445
December	27 748	4 756	10 099	n.a.	15 420	3 647	3 210	n.a.	6 245
January	28 964	5 786	11 381	n.a.	16 866	3 850	3 908	n.a.	8 017
February	26 999	4 626	10 161	n.a.	15 123	3 756	3 346	n.a.	7 137
March	29 041	4 987	10 066	n.a.	15 669	3 854	3 318	n.a.	7 363
TREND ESTIMATES									
1996-97									
January	28 260	4 825	10 531	n.a.	15 392	3 687	3 701	n.a.	7 553
February	28 282	4 821	10 352	n.a.	15 279	3 721	3 759	n.a.	7 696
March	28 187	4 752	10 207	n.a.	15 197	3 676	3 768	n.a.	7 698
April	28 076	4 644	10 154	n.a.	15 166	3 574	3 745	n.a.	7 584
May	27 989	4 570	10 201	n.a.	15 206	3 469	3 714	n.a.	7 425
June	27 947	4 570	10 335	n.a.	15 318	3 419	3 688	n.a.	7 313
1997-98									
July	27 989	4 621	10 478	n.a.	15 467	3 450	3 647	n.a.	7 257
August	28 157	4 727	10 632	n.a.	15 668	3 555	3 609	n.a.	7 274
September	28 294	4 841	10 739	n.a.	15 834	3 678	3 572	n.a.	7 295
October	28 310	4 927	10 757	n.a.	15 910	3 762	3 536	n.a.	7 292
November	28 234	4 979	10 694	n.a.	15 899	3 803	3 507	n.a.	7 282
December	28 163	5 002	10 604	n.a.	15 856	3 804	3 479	n.a.	7 263
January	28 161	5 019	10 512	n.a.	15 814	3 800	3 452	n.a.	7 257
February	28 200	5 030	10 403	n.a.	15 762	3 801	3 426	n.a.	7 268
March	28 290	5 027	10 378	n.a.	15 746	3 798	3 398	n.a.	7 286

(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 Sherry '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										
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	r 26 923	812	1 321	100	3 422	1 230	437	207	106	97
December	r 26 552	719	1 273	99	3 899	1 634	446	197	99	121
January	r 15 545	489	704	60	1 157	379	217	125	43	55
February	r 19 659	460	802	69	1 130	401	167	130	123	58
March	23 134	589	1 068	87	1 417	590	219	148	30	71

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

(c) Includes wine cocktails, marsala, apertif and tonic wines.

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

(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)								
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								
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	653
October	2 562	7	576	127	3 271	12 664	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
February	1 742	9	218	40	2 010	6 032	40	431
March	1 324	7	100	73	1 504	5 465	44	468
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	144 894	2 490	6 046	966	154 395	603 372	17	526
1996-97								
January	8 095	127	262	97	8 581	34 286	—	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	r14 155	99	482	54	r14 790	r63 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	r21 493	r92 166	2	14
November	12 198	207	422	60	12 887	r58 073	3	50
December	r11 447	169	336	r42	r11 994	r56 518	4	33
January	r9 163	191	r 159	15	r9 529	r44 204	2	21
February	r14 571	200	r 559	r43	r15 373	r73 700	5	25
March	17 293	111	448	122	17 974	80 399	2	12

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.

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

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

EXPORTS OF AUSTRALIAN WINE BY COUNTRY OF DESTINATION, March 1998

Country/Region	WINE TYPE.....				TOTAL WINE.....	
	Table	Fortified	Sparkling	Other	Quantity	Value
	L	L	L	L	L	\$'000
Fiji	51 357	409	5 760	—	57 526	175
New Zealand	2 552 906	21 012	27 990	22 410	2 624 317	4 416
Papua New Guinea	49 051	—	2 439	—	51 490	139
Total Oceania and Antarctica(a)	2 673 243	21 568	47 968	22 590	2 765 369	4 861
Denmark	195 963	90	—	—	196 053	877
Germany, Federal Republic of	205 492	—	988	33	206 513	1 162
Ireland	255 618	—	—	—	255 618	1 398
Netherlands	260 889	—	—	—	260 889	1 131
Sweden	419 327	135	24 336	—	443 798	1 340
United Kingdom	7 099 119	3 875	259 917	8 991	7 371 902	32 491
Total European Union	8 721 749	4 100	300 658	9 069	9 035 576	39 885
Norway	294 450	—	9 000	—	303 450	1 094
Switzerland	270 185	—	9 043	20 160	299 388	1 817
Total Europe and the Former USSR(a)	9 358 894	4 100	318 701	29 229	9 710 924	42 966
Oman	8 215	—	1 440	—	9 655	27
United Arab Emirates	71 263	—	3 150	—	74 413	152
Total Middle East and North Africa(a)	82 498	—	4 698	59	87 255	217
Malaysia	47 602	234	576	2 400	50 812	315
Singapore	110 422	360	1 157	46 930	158 869	889
Total Southeast Asia(a)	196 747	837	2 417	49 330	249 331	1 394
Hong Kong	143 660	468	1 811	2 178	148 117	1 038
Japan	713 761	16 990	6 795	11 405	748 951	3 593
Total Northeast Asia(a)	929 601	21 598	10 701	15 887	977 787	5 307
Canada	664 614	19 008	30 135	—	713 757	3 922
United States of America	3 360 791	43 045	32 476	1 350	3 437 662	21 517
Total Northern America(a)	4 025 405	62 053	62 611	1 350	4 151 419	25 439
Total Other Regions(b)	26 378	900	900	3 589	31 767	215
Total All Countries	17 292 765	111 056	447 996	122 034	17 973 851	80 399

(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)

	<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
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	95 491	974	3 698	7 070	28 906	338	154 395
1996-97								
January	1 243	4 714	58	229	699	1 624	13	8 581
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	1 770	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	673	2 959	27	11 994
January	1 062	5 624	148	124	556	1 996	18	9 529
February	1 526	7 947	95	200	904	4 673	29	15 373
March	2 765	9 711	87	249	978	4 151	32	17 974

(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. 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.

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*.

EXPLANATORY NOTES

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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