

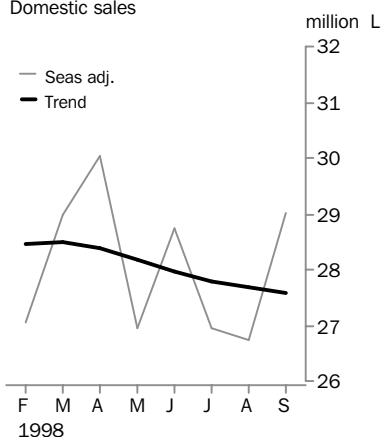


SALES OF AUSTRALIAN WINE AND BRANDY BY WINEMAKERS

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

Australian produced wine

Domestic sales



SEPTEMBER KEY FIGURES

TREND ESTIMATES	Sep 98 '000 L	% change Aug 98 to Sep 98	% change Sep 97 to Sep 98
Australian produced wine			
Domestic wine sales	27 590	-0.4	-2.8
White table wine sales	15 348	-0.2	-3.1
Red and rosé table wine sales	7 097	-0.6	-4.3

SEASONALLY ADJUSTED	Sep 98 '000 L	% change Aug 98 to Sep 98	% change Sep 97 to Sep 98
Australian produced wine			
Domestic wine sales	29 025	8.6	3.8
White table wine sales	16 427	13.8	8.3
Red and rosé table wine sales	7 646	13.7	1.0

SEPTEMBER KEY POINTS

TREND ESTIMATES

- The trend series for total domestic sales of Australian produced wine fell by 0.4% in September. While this is the sixth consecutive month of decline in the trend series it follows a period of record domestic sales where 16 of the past 24 months trend estimates are the highest ever recorded for this series.
- The trend estimate for white table wine fell by 0.2% in September while the estimate for red/rosé table wine fell by 0.6%.

SEASONALLY ADJUSTED ESTIMATES

- The seasonally adjusted estimate for the total domestic sales of Australian produced wine for September was 29.0 million litres, up 8.6% on August and up 3.8% on September 1997.
- The seasonally adjusted estimate for white table wine increased 13.8% in September while the estimate for red/rosé was up 13.7%.

ORIGINAL ESTIMATES

- In original terms, 28.5 million litres of Australian produced wine was disposed of domestically by winemakers during September, up 14.8% on August and up 1.6% on September 1997.

PLEASE NOTE:
For wine production and stocks data for 1997-98, see page 2

- For further information about these and related statistics, contact Peter Carmalt on Adelaide 08 8237 7632 or any ABS office shown on the back cover of this publication.

NOTES

FORTHCOMING ISSUES

ISSUE	RELEASE DATE
October 1998	3 December 1998
November 1998	8 January 1999
December 1998	3 February 1999
January 1999	3 March 1999
February 1999	1 April 1999
March 1999	3 May 1999

CHANGES IN THIS ISSUE

The carbonated wine series in Table 2 has been subject to mis-reporting for a number of years. The series has been revised back to July 1997 with a consequential revision to red and rosé table wine in glass containers less than 2 litres. Data is not able to be revised prior to July 1997. Total wine sales are unaffected.

ANNUAL PRODUCTION AND STOCKS UPDATE

Preliminary results from the 1997–98 Wine Production collections show there was 676.7 million litres of beverage wine produced in Australia, up 16.5% on 1996–97 and up 9.1% on the previous record volume of 620.1 million litres in 1995–96. Wine production rose by around 17% in each of the three major wine producing States of South Australia, New South Wales and Victoria.

The survey also reveals that the good seasonal conditions saw a record quantity of fresh grapes crushed by Australian winemakers in 1997–98. The preliminary estimate for grapes crushed is 954,200 tonnes, up 19.6% on 1996–97 and up 8.0% on the previous record crush of 883,318 tonnes in 1995–96.

Preliminary results from the Stocks of Australian Wine collection show that the stocks of beverage wine owned by winemakers at 30 June 1998 was 867.5 million litres. This is up 6.4% on the previous record level of 815.6 million litres of stocks owned at 30 June 1997.

Final information will be available in the publication *Australian Wine and Grape Industry, 1998* (1329.0), expected to be released in late November / early December 1998.

W. McLennan
Australian Statistician

DOMESTIC AUSTRALIAN TABLE WINE SALES: Trend

TABLE WINE, GLASS CONTAINER < 2 LITRES

The September trend estimate for white table wine in glass containers less than 2 litres was up 0.2% on September 1997 and 6.6% on September 1996. The trend estimate for red/rosé table wine increased 3.4% on September 1997 and 23.0% on September 1996.

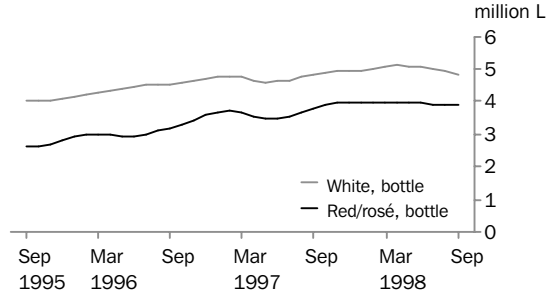
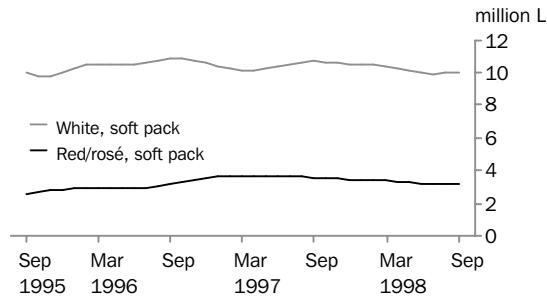


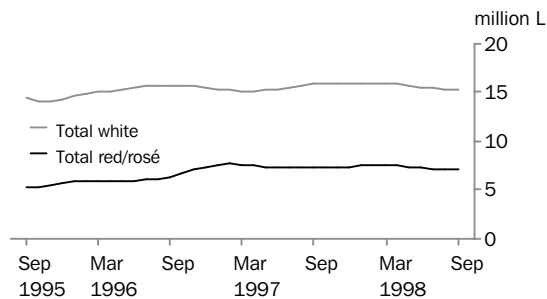
TABLE WINE, SOFT PACK CONTAINERS

The September trend estimate for white table wine in soft packs fell by 6.5% since September 1997, while red/rosé packs fell 10.2%. For the last two months, the red/rosé series has recorded increases after declining for 16 consecutive months.



TOTAL WHITE AND RED/ROSÉ TABLE WINE

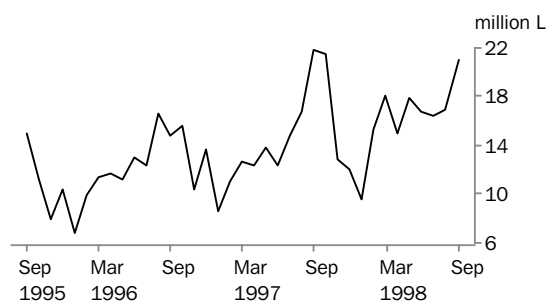
The September trend estimate for the domestic sales of total white table wine is 5.4% higher than the estimate recorded for September 1995. The September trend estimate for red/rosé table wine is up 33.0% since September 1995 although it has fallen 4.3% over the last 12 months.



EXPORTS OF AUSTRALIAN PRODUCED WINE AND IMPORTS

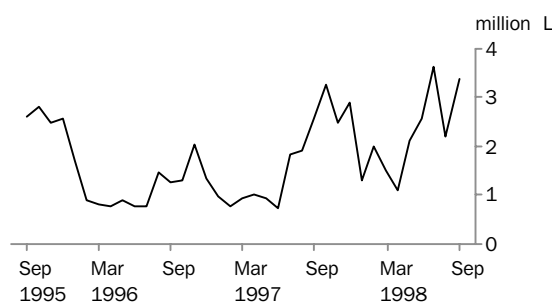
EXPORTS OF AUSTRALIAN PRODUCED WINE

Original data for September shows that 21.0 million litres of Australian wine worth \$106.8 million was exported. While this is the third highest volume of wine exported it is the highest monthly value of wine ever recorded, the first to break the \$100 million level.



WINE IMPORTS CLEARED FOR HOME CONSUMPTION

Original data for wine imports cleared for home consumption in September was up 54.7% on August 1998 and 32.9% on September 1997.



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

Original data for the September quarter 1998 shows that wine available for consumption in Australia fell by 0.7% on the same quarter in 1997. Domestic sales of Australian produced wine fell by 4.0% but was mostly offset by an increase of 45.9% in the volume of imported wine. Total disposals of Australian wine fell by 1.9% over the same period with an increase of 1.6% in exports unable to offset the 4.0% fall in domestic sales.

<i>Period</i>	<i>A Domestic sales of Australian produced wine</i> '000 L	<i>B Wine imports cleared for home consumption</i> '000 L	<i>A + B Wine available for consumption</i> '000 L	<i>C Exports of Australian produced wine</i> '000 L	<i>A + C Total disposals of Australian produced wine</i> '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	192 400	531 214
September Qtr 1997	88 693	6 323	95 016	53 469	142 162
September Qtr 1998	85 109	9 224	94 333	54 331	139 440

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	
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	r46 746	41 295	868	r88 909
1997-98									
September	28 043	4 588	10 235	239	15 064	r3 792	3 944	62	r7 799
October	29 086	5 387	10 107	395	15 888	r4 017	3 537	73	r7 626
November	34 559	5 911	12 576	465	18 953	r4 353	3 807	66	r8 226
December	34 917	6 521	12 638	478	19 638	r3 857	3 156	92	r7 104
January	18 719	3 652	7 495	444	11 591	r2 082	1 910	42	r4 035
February	22 942	4 388	9 529	525	14 442	r2 829	2 414	44	r5 287
March	27 282	5 041	10 741	681	16 461	r3 783	2 937	54	r6 775
April	28 634	5 120	10 558	418	16 096	r4 286	3 494	59	r7 839
May	26 568	4 552	9 833	278	14 664	r4 125	3 263	73	r7 461
June	27 414	4 438	10 037	385	14 861	r4 270	3 716	68	r8 054
1998-99									
July	31 795	5 213	10 238	627	16 078	r5 572	4 385	61	r10 017
August	24 820	4 101	8 946	282	13 329	r4 018	3 403	48	r7 469
September	28 494	4 956	10 090	485	15 532	4 182	3 678	59	7 919
SEASONALLY ADJUSTED									
1997-98									
September	27 973	4 881	10 316	n.a.	15 172	3 801	3 687	n.a.	7 570
October	27 771	5 040	10 366	n.a.	15 877	4 035	3 544	n.a.	7 443
November	28 775	4 658	10 894	n.a.	15 945	4 062	3 348	n.a.	7 542
December	27 661	4 721	10 181	n.a.	15 463	3 820	3 210	n.a.	7 094
January	28 919	5 759	11 148	n.a.	16 887	3 988	3 853	n.a.	7 745
February	27 040	4 612	10 098	n.a.	15 133	3 861	3 319	n.a.	7 207
March	28 991	4 941	10 167	n.a.	15 624	3 932	3 294	n.a.	7 599
April	30 039	5 145	11 000	n.a.	17 252	4 124	3 552	n.a.	7 805
May	26 954	4 783	9 952	n.a.	14 864	4 025	3 131	n.a.	7 134
June	28 729	5 993	9 957	n.a.	15 890	4 000	3 320	n.a.	7 719
1998-99									
July	26 931	4 940	9 584	n.a.	15 126	3 832	3 088	n.a.	6 740
August	26 737	4 071	9 703	n.a.	14 432	3 719	2 949	n.a.	6 724
September	29 025	5 171	10 751	n.a.	16 427	4 205	3 566	n.a.	7 646
TREND ESTIMATES									
1997-98									
September	28 376	4 835	10 727	n.a.	15 847	3 815	3 589	n.a.	7 418
October	28 321	4 897	10 699	n.a.	15 881	3 913	3 532	n.a.	7 434
November	28 223	4 947	10 624	n.a.	15 874	3 959	3 490	n.a.	7 441
December	28 189	4 965	10 567	n.a.	15 888	3 964	3 461	n.a.	7 444
January	28 271	4 974	10 537	n.a.	15 928	3 956	3 443	n.a.	7 463
February	28 439	5 027	10 511	n.a.	15 994	3 967	3 431	n.a.	7 504
March	28 498	5 084	10 424	n.a.	15 968	3 977	3 399	n.a.	7 515
April	28 390	5 115	10 269	n.a.	15 836	3 981	3 340	n.a.	7 473
May	28 190	5 103	10 127	n.a.	15 673	3 975	3 270	n.a.	7 383
June	27 957	5 060	10 023	n.a.	15 517	3 959	3 219	n.a.	7 275
1998-99									
July	27 773	5 000	9 978	n.a.	15 412	3 945	3 200	n.a.	7 188
August	27 695	4 936	9 997	n.a.	15 383	3 943	3 208	n.a.	7 139
September	27 590	4 843	10 031	n.a.	15 348	3 945	3 223	n.a.	7 097

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

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

(c) 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.

r figure or series revised since the previous issue.

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	r278 422	24 574	22 310	8 759	r1 641	2 145	963	974
1997-98								
July	r26 499	2 976	1 545	556	r129	259	134	103
August	r24 058	2 130	1 365	573	r145	199	83	87
September	r22 862	2 149	1 918	745	r117	165	87	88
October	r23 515	1 752	2 745	660	r160	173	82	75
November	r27 179	2 233	3 422	1 230	r182	207	106	97
December	r26 741	2 090	3 899	1 634	r257	197	99	121
January	r15 626	1 253	1 157	379	r136	125	43	55
February	r19 730	1 330	1 130	401	r97	130	123	58
March	r23 236	1 743	1 417	590	r116	148	30	71
April	r23 936	2 193	1 485	696	r113	167	44	66
May	r22 125	2 214	1 170	721	r105	204	31	68
June	r22 915	2 511	1 057	574	r84	171	101	85
1998-99								
July	r26 095	2 902	1 569	792	r105	265	67	78
August	r20 798	1 919	1 146	588	r102	196	72	85
September	23 451	1 874	1 746	1 065	136	151	71	71

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

(b) Prior to July 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.

r figure or series revised since the previous issue.

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 a1	\$'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								
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	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	r7 676	49	609
September	2 888	9	343	158	3 398	10 575	54	607
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	r 183 024	2 505	6 107	764	r 192 400	r 873 807	26	385
1997-98								
July	14 156	99	481	54	14 790	63 435	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	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	80 949	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	r16 058	216	385	42	r16 700	r79 832	2	66
1998-99								
July	r15 608	198	489	77	r16 373	r76 497	2	10
August	r16 113	r 226	r 491	r 102	r16 931	r87 455	1	13
September	19 997	208	738	85	21 027	106 840	2	49

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, September
1998

Country/Region	WINE TYPE.....				TOTAL WINE.....	
	<i>Table</i>	<i>Fortified</i>	<i>Sparkling</i>	<i>Other</i>	<i>Quantity</i>	<i>Value</i>
	L	L	L	L	L	\$'000
Fiji	39 006	653	3 870	—	43 529	195
New Zealand	1 914 699	16 298	126 237	11 955	2 069 189	7 120
Papua New Guinea	70 463	5 944	6 633	—	83 040	241
Total Oceania and Antarctica(a)	2 069 678	27 998	147 378	12 000	2 257 054	7 759
Denmark	287 778	99	1 832	189	289 897	1 285
Germany, Federal Republic of	544 499	—	1 845	800	547 144	2 756
Ireland	644 425	—	4 140	1 404	649 969	3 988
Netherlands	244 130	—	1 728	6 075	251 933	1 223
Sweden	250 785	113	40 752	—	291 650	1 139
United Kingdom	10 069 531	70 213	440 224	35 910	10 615 878	52 134
Total European Union	12 355 662	70 618	495 645	45 350	12 967 274	64 310
Norway	260 475	—	11 133	—	271 608	1 073
Switzerland	118 566	4 428	900	—	123 894	996
Total Europe and the Former USSR(a)	12 807 587	75 046	507 741	45 350	13 435 723	66 559
Turkey	1 980	—	—	—	1 980	7
United Arab Emirates	2 700	—	—	—	2 700	15
Total Middle East and North Africa(a)	5 786	—	—	—	5 786	25
Singapore	94 981	621	3 249	10 989	109 840	677
Thailand	72 716	16 045	693	450	89 904	199
Total Southeast Asia(a)	331 986	17 854	6 516	11 538	367 894	1 801
Hong Kong	131 815	14 976	10 346	—	157 136	826
Japan	569 272	—	2 275	12 871	584 418	3 232
Total Northeast Asia(a)	760 843	25 281	25 150	13 771	825 044	4 633
Canada	615 982	37 584	9 387	1 800	664 753	3 675
United States of America	3 376 920	23 789	41 783	216	3 442 708	22 229
Total Northern America(a)	3 995 827	61 373	51 170	2 016	4 110 386	25 924
Total Other Regions(b)	25 388	—	189	—	25 577	139
Total All Countries	19 997 095	207 552	738 143	84 675	21 027 465	106 840

(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)

Period	Oceania & Antarctica	Europe & the Former USSR	Middle East & North Africa	Southeast Asia	Northeast Asia	Northern America	Other(b)	Total all regions
	'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	r 115 654	1 266	2 830	9 244	39 559	466	r 192 400
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	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	r10 378	74	227	799	3 749	38	r16 700
1998-99								
July	2 236	r9 622	93	184	712	r3 511	14	r16 373
August	r2 276	r11 237	58	398	r 573	r2 363	24	r16 931
September	2 257	13 436	6	368	825	4 110	26	21 027

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.

EXPLANATORY NOTES

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* (1348.0) or contact the Assistant Director, Time Series Analysis on (02) 6252 6345.

ACKNOWLEDGMENT

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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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