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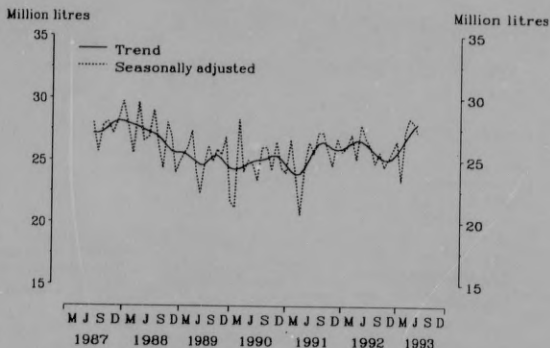
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SALES OF AUSTRALIAN WINE AND BRANDY BY WINEMAKERS, JUNE 1993

SUMMARY OF FINDINGS

DOMESTIC WINE SALES



Domestic sales

The trend in domestic sales of Australian wine by winemakers continues to show growth, with sales in June 1993 registering a 1.2 per cent increase over the previous month, the seventh consecutive monthly increase. However there are early signs that the trend growth is slowing. The 1.2 per cent increase in the trend between May and June follows increases of 1.7 per cent to May and 2.0 per cent to April 1993.

This slowing of the trend growth can also be seen by the fact that a fall of 3.7 per cent in the seasonally adjusted estimate of wine sales for July 1993, will see the trend start to flatten out. The average monthly movement in the seasonally adjusted wine sales series, regardless of sign, is 6.6 per cent. Readers are reminded that recent trend estimates are provisional and could change when data for future months become available.

In seasonally adjusted terms, total domestic sales of Australian wine for June 1993 were 27.2 million litres, a decrease of 3.0 per cent on May 1993 but up 2.1 per cent on June 1992.

Using original data, domestic sales for June 1993 were 24.5 million litres, a decrease of 2.9 per cent on May 1993.

Exports

A total of 12.1 million litres of wine was exported from Australia in May 1993, with a value of \$32.7 million. In terms of volume, exports are 37.4 per cent higher than in May 1992 and 46.1 per cent higher than for April 1993. Table wine represented 93.4 per cent of total exports in May 1993. Exports for the eleven months July 1992 to May 1993 were 89.8 million litres worth \$254.6 million, 31.4 per cent higher by volume and 19.9 per cent higher by value than for the corresponding period in 1991-92.

Imports

Australia imported 0.6 million litres of wine with a value of \$3.7 million in May 1993. In the eleven months to May 1993, Australia imported 7.3 million litres of wine, a decrease of 1.0 million litres (12.3%) when compared with the same period in 1991-92.

INQUIRIES

- for further information about statistics in this publication and the availability of related unpublished statistics, contact Peter Carmalt on Adelaide (08) 237 7626 or any ABS State Office.
- for information about other ABS statistics and services please refer to the back page of this publication.

SUMMARY OF FINDINGS (continued)

A comparison of domestic wine sales (original data) for the periods 1991-92 and 1992-93 follows.

Wine type	1991-92	1992-93	Percentage change
	'000L	'000L	
Table			
White - bottles 1 litre and under	43,461	44,099	1.5
White - other containers	146,731	142,306	-3.0
Total	190,192	186,405	-2.0
Red - bottles 1 litre and under	24,048	25,268	5.1
Red - other containers	26,742	29,783	11.4
Total	50,790	55,051	8.4
Rose - bottles 1 litre and under	763	613	-19.7
Rose - other containers	4,959	4,239	-14.5
Total	5,722	4,852	-15.2
Total table wine	246,704	246,308	-0.2
Fortified	29,891	27,914	-6.6
Sparkling			
Bottle fermented	25,406	25,252	-0.6
Bulk fermented	4,747	4,700	-1.0
Total sparkling wine	30,153	29,952	-0.7
Other	8,082	7,457	-7.7
TOTAL WINE SALES	314,830	311,631	-1.0

Total domestic sales of Australian wine by winemakers for the financial year 1992-93 fell slightly (down 1.0%) to 311.6 million litres, from the peak of 314.8 million litres sold during 1991-92. Sales in 1992-93 were still higher than those for the three financial years prior to 1991-92.

There were 246.7 million litres of table wine sold in 1992-93, consistent with sales in 1991-92. However, sales by wine types within this category show marked variations as shown below:

- White wine sales for this period fell by 2 per cent when compared with 1991-92. This was due to a 3 per cent fall in sales of white wine in casks and other containers. Sales of white wine in bottles 1 litre and under increased by 1.5 per cent during 1992-93.
- Red wine sales rose strongly by 8.4 per cent during 1992-93. There was a rise in sales of both bottled wine (5.1%) and red wine in other containers (up 11.4%).
- Sales of rose were down 15.2 per cent or 0.87 million litres on the previous period. Of this, 0.72 million litres was in the other containers (mainly soft packs) category.

The remaining wine types all recorded decreases in sales in 1992-93 when compared to the previous financial year: fortified wine (-6.6%), sparkling wine (-0.7%) and other wine types (-7.7%).

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

Period	Wine type						Total wine			Trend estimate	Brandy(b) (^{'000L. a.})
	Table	Fortified	Sparkling	Carbonated	Flavoured (a)	Vermouth	Original	Seasonally adjusted			
	(^{'000 litres})										
1990-91	228,332	30,744	29,463	3,377	2,737	1,619	296,272	..	..	1,444	
1991-92	246,704	29,891	30,153	3,751	2,921	1,410	314,830	..	..	1,380	
1992-93	246,308	27,914	29,952	3,387	2,789	1,281	311,631	..	..	n.y.a.	
1991-92—											
April	18,843	2,415	1,997	206	203	93	23,757	25,086	26,556	125	
May	19,820	2,862	1,783	213	270	65	25,013	27,827	26,523	75	
June	19,150	2,822	1,625	147	208	67	24,019	26,674	26,295	98	
1992-93—											
July	24,331	3,260	2,076	303	286	89	30,345	25,989	25,921	154	
August	19,458	2,606	1,773	305	225	121	24,488	24,717	25,547	129	
September	19,895	2,264	2,377	283	224	113	25,156	25,627	25,251	103	
October	19,668	2,250	3,088	277	234	133	25,650	24,435	25,049	117	
November	23,397	2,545	4,096	406	338	141	30,923	25,086	25,001	118	
December	27,321	2,856	6,119	488	320	136	37,240	25,780	25,196	119	
January	14,334	1,208	1,494	157	166	107	17,466	26,524	25,564	52	
February	16,029	1,412	1,564	197	157	104	19,463	23,296	26,050	116	
March	19,973	1,964	1,898	250	197	70	24,352	27,207	26,595	87	
April	21,895	2,238	2,121	264	175	112	26,805	28,317	27,123	97	
May	20,319	2,523	1,831	275	217	71	25,236	28,055	27,573	116	
June	19,688	2,788	1,515	182	250	84	24,507	27,222	27,907	n.y.a.	

(a) Includes wine cocktails, marsala, aperitif and tonic wines. (b) 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			Bottle fermentation	Bulk fermentation	Dry	Sweet
	Dry	Medium (b)	Sweet	Port	Muscat	Other (c)				
1990-91	2,415	3,154	7,477	15,982	1,583	133	25,714	3,749	738	881
1991-92	2,281	2,938	7,173	15,933	1,438	128	25,406	4,747	644	766
1992-93	2,018	2,401	6,570	15,496	1,257	172	25,252	4,700	581	700
1991-92—										
April	218	240	616	1,226	107	8	1,619	378	42	51
May	197	275	623	1,626	131	10	1,444	339	34	31
June	174	266	651	1,603	117	11	1,193	432	32	35
1992-93—										
July	253	284	762	1,807	139	15	1,648	428	43	46
August	177	219	641	1,428	129	12	1,479	294	55	66
September	151	192	567	1,231	109	14	1,955	422	57	56
October	181	204	547	1,193	105	20	2,680	408	57	76
November	178	228	575	1,437	99	28	3,561	535	62	79
December	170	223	600	1,741	105	17	5,339	780	62	74
January	100	103	344	595	58	8	1,236	258	n.p.	n.p.
February	119	130	367	724	64	8	1,261	303	n.p.	n.p.
March	171	173	482	1,027	99	12	1,575	323	32	38
April	147	187	502	1,262	125	15	1,781	340	56	56
May	186	230	596	1,400	100	11	1,497	334	28	43
June	185	228	587	1,651	125	12	1,240	275	39	45

(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				
	1 litre and under	Over 1 litre	Soft pack(b)	Bulk(c)	Total	1 litre and under	Over 1 litre	Soft pack(b)	Bulk(c)	Total
1990-91	39,771	1,856	102,097	7,743	151,467	3,151	224	21,294	73	24,742
1991-92	40,736	1,627	122,410	6,690	171,463	2,725	203	15,721	80	18,729
1992-93	41,243	1,319	120,534	4,784	167,880	2,856	203	15,405	61	18,525
1991-92—										
April	3,048	124	9,730	290	13,192	179	12	1,190	4	1,385
May	3,059	112	10,215	276	13,662	197	n.p.	1,311	n.p.	1,529
June	2,731	108	9,437	356	12,632	168	15	1,186	7	1,376
1992-93—										
July	3,563	121	11,922	273	15,879	250	15	1,481	6	1,752
August	3,092	117	9,124	268	12,601	211	17	1,248	5	1,481
September	3,478	113	9,615	334	13,540	260	16	1,011	8	1,295
October	3,478	123	9,615	341	13,557	234	15	1,140	5	1,394
November	4,308	130	11,596	381	16,415	305	21	1,224	6	1,556
December	5,029	147	13,344	774	19,294	347	29	1,518	7	1,901
January	2,075	79	7,994	421	10,569	203	11	907	4	1,125
February	3,264	91	8,086	485	11,926	217	13	889	3	1,122
March	3,308	100	9,946	333	13,687	227	16	1,412	4	1,659
April	3,688	104	10,436	390	14,618	242	17	1,673	4	1,936
May	3,136	91	9,767	389	13,383	185	n.p.	1,416	n.p.	1,619
June	2,824	103	9,089	395	12,411	175	n.p.	1,486	n.p.	1,685

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				
	1 litre and under	Over 1 litre	Soft pack(b)	Bulk(c)	Total	1 litre and under	Over 1 litre	Soft pack(b)	Bulk(c)	Total
1990-91	23,185	530	21,169	1,290	46,174	903	175	4,822	49	5,949
1991-92	24,048	521	25,200	1,021	50,790	763	137	4,792	30	5,722
1992-93	25,268	464	28,677	642	55,051	n.p.	118	4,107	n.p.	4,852
1991-92—										
April	1,860	35	1,936	74	3,905	53	n.p.	295	n.p.	361
May	1,954	41	2,141	59	4,195	53	n.p.	370	n.p.	434
June	2,152	41	2,473	40	4,706	55	n.p.	368	n.p.	436
1992-93—										
July	2,835	45	3,206	41	6,127	67	n.p.	493	n.p.	573
August	2,224	43	2,543	128	4,938	52	n.p.	381	n.p.	438
September	2,182	41	2,422	41	4,686	46	n.p.	315	n.p.	374
October	1,992	44	2,272	28	4,336	51	11	318	1	381
November	2,389	42	2,504	42	4,977	58	n.p.	378	n.p.	449
December	2,724	48	2,726	42	5,540	91	n.p.	478	n.p.	586
January	891	23	1,465	34	2,413	33	n.p.	187	n.p.	227
February	1,247	27	1,410	23	2,707	40	8	225	1	274
March	2,017	35	2,176	25	4,253	46	n.p.	320	n.p.	374
April	2,257	38	2,559	86	4,940	45	9	346	1	401
May	2,255	34	2,572	69	4,930	41	n.p.	334	n.p.	387
June	2,255	44	2,822	83	5,204	n.p.	n.p.	332	n.p.	388

(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 at	\$'000
IMPORTS CLEARED								
1989-90	6,595	184	2,736	937	10,453	52,692	793	7,998
1990-91	5,604	191	2,285	919	8,999	46,779	636	6,711
1991-92	5,190	160	373	979	8,703	45,649	662	7,315
1991-92—								
March	416	20	133	108	677	3,370	47	480
April	354	10	139	102	605	2,980	46	490
May	262	27	150	50	490	2,778	48	428
June	224	5	101	47	378	2,037	41	436
1992-93—								
July	351	9	167	75	602	3,281	55	465
August	473	10	272	43	798	4,546	53	1,107
September	525	6	197	41	769	4,610	49	516
October	415	6	292	16	730	4,692	45	767
November	421	11	319	63	813	5,448	48	585
December	454	7	287	63	812	4,282	55	567
January	469	11	161	61	602	4,450	83	1,015
February	253	17	151	68	490	3,902	48	811
March	303	4	100	90	497	2,895	50	661
April	466	9	82	77	635	2,494	24	307
May	368	7	130	51	556	3,679	56	723
1991-92—								
July to May	4,966	154	2,273	931	8,325	43,613	621	6,879
1992-93—								
July to May	4,399	99	2,158	648	7,304	41,280	565	7,523
EXPORTS (a) (b)								
1989-90	32,095	1,936	2,074	2,015	38,120	121,248	52	463
1990-91	46,894	2,765	3,180	1,321	54,160	179,588	39	798
1991-92	71,657	2,382	3,900	637	78,576	242,991	74	958
1991-92—								
March	5,328	161	402	30	5,921	19,552	12	196
April	6,148	242	360	79	6,828	23,257	6	27
May	8,196	206	395	30	8,828	27,360	8	176
June	9,484	162	515	88	10,249	30,665	5	54
1992-93—								
July	7,494	163	377	80	8,115	24,405	5	36
August	8,512	200	544	106	9,362	27,011	1	7
September	8,682	271	572	60	9,585	28,517	16	98
October	7,178	164	387	62	7,792	22,105	3	64
November	6,505	96	387	116	7,103	18,631	12	164
December	4,696	49	248	61	5,055	13,038	3	101
January	6,245	93	212	84	6,634	20,666	5	77
February	5,851	140	279	51	6,320	17,029	7	50
March	8,807	193	376	14	9,389	28,326	11	147
April	7,933	67	271	33	8,305	22,157	6	50
May	11,337	218	515	63	12,134	32,746	1	8
1991-92—								
July to May	62,173	2,220	3,385	548	68,325	212,326	79	904
1992-93—								
July to May	83,240	1,654	4,169	731	89,795	254,631	70	802

(a) Exports may include sales made by exporters other than winemakers. (b) The timing basis for compilation of exports statistics changed in April 1992 (see Explanatory note 5).

TABLE 5. EXPORTS OF AUSTRALIAN WINE BY COUNTRY OF DESTINATION, MAY 1993 (a)

Country/Region	Wine type				Total wine	
	Table	Fortified	Sparkling (Litres)	Other	Quantity	Value (\$'000)
Fiji	9,967	165	3,027	-	13,159	63
New Caledonia	31,195	-	-	-	31,195	42
New Zealand	2,285,686	51,234	42,102	14,175	2,393,197	2,845
Total Oceania & Antarctica (b)	2,388,663	51,984	49,515	14,490	2,504,652	3,168
Denmark	10,530	-	-	-	10,530	27
Finland	210,590	-	3,600	-	214,190	302
France	134,189	-	-	-	134,189	163
Germany	41,560	-	-	-	41,560	76
Ireland	180,569	-	1,350	-	181,919	681
Netherlands	68,662	-	-	-	68,662	159
Norway	137,347	-	-	-	137,347	295
Sweden	1,429,207	-	80,662	-	1,509,869	2,490
Switzerland	185,026	-	900	-	185,926	429
United Kingdom	4,656,386	85,701	287,793	19,350	5,049,230	16,912
Total Europe & the CIS (b)	7,079,430	85,701	374,303	19,350	7,558,806	21,562
United Arab Emirates	72,594	1,680	5,670	1,350	81,294	144
Total Middle East & North Africa (b)	87,794	1,680	6,120	2,262	97,856	170
Indonesia	65,723	-	531	-	66,254	105
Singapore	37,726	450	1,800	1,729	41,705	146
Thailand	78,845	1,260	540	315	80,960	185
Total Southeast Asia (b)	207,402	1,710	5,112	6,382	220,606	549
Hong Kong	49,056	2,151	9,358	576	61,141	273
Japan	144,075	-	59,967	15,813	219,855	664
Total Northeast Asia (b)	193,131	2,151	69,325	17,935	282,542	950
Canada	420,372	52,298	873	-	473,543	1,608
USA	948,827	14,522	8,406	-	971,755	4,654
Total North America (b)	1,369,199	66,820	9,279	-	1,445,298	6,262
Total Other Regions	11,505	8,450	1,350	2,520	23,825	88
Total All Countries	11,337,144	218,496	515,006	62,939	12,133,585	32,749

(a) The timing basis for compilation of exports statistics changed in April 1992 (see Explanatory note 5). Monthly figures are not comparable with data published before April 1992. (b) Includes other countries as detailed in *Australian Standard Classification of Countries for Social Statistics* (1269.0).

TABLE 6: EXPORTS OF AUSTRALIAN WINE BY REGION
(^{'000 litres}) (a)

Period	Oceania & Antarctica	Europe & the CIS	Middle East	Southeast Asia	Northeast Asia	North America	Other	Total all Regions
1989-90	5,639	19,465	680	1,127	2,935	8,057	217	38,120
1990-91	8,830	29,510	664	1,264	3,387	10,233	271	54,160
1991-92	7,502	50,783	854	1,588	3,448	14,117	286	78,576
1991-92—								
March	720	3,425	138	151	382	1,071	34	5,921
April	486	4,343	123	115	290	1,466	5	6,828
May	629	6,200	119	190	376	1,300	14	8,828
June	466	7,606	76	140	162	1,765	35	10,249
1992-93—								
July	1,046	4,794	64	132	310	1,758	12	8,115
August	833	7,155	31	148	304	863	30	9,362
September	1,630	5,476	34	91	218	2,125	11	9,585
October	1,607	4,110	71	227	464	1,280	33	7,792
November	1,784	3,461	38	165	460	1,122	74	7,103
December	1,414	2,387	100	74	348	724	9	5,055
January	672	4,723	29	90	187	909	29	6,634
February	1,166	3,568	94	157	234	1,068	33	6,320
March	1,269	5,610	126	221	288	1,820	54	9,389
April	1,862	4,548	46	157	214	1,468	10	8,305
May	2,505	7,559	98	221	283	1,445	24	12,134
1991-92—								
July to May	7,035	43,176	778	1,449	3,287	12,352	252	68,325
1992-93—								
July to May	15,788	53,391	731	1,683	3,310	14,582	319	89,795

(a) The timing basis for compilation of exports statistics changed in April 1992 (see Explanatory note 5).

EXPLANATORY NOTES

Introduction

The information shown in this publication for wine sales 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 wine is obtained from winemaking enterprises with wine sales of 250,000 litres or more in the previous financial year. These account for approximately 97 per cent of total wine sales.
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.
5. Commencing with April 1992, the timing basis for the compilation of merchandise exports statistics has been changed. The change involves compiling exports statistics on the basis of goods shipped in any period rather than the basis of the documentation of goods shipped in that or earlier periods. In the past only about half of shipments were recorded in the month of shipment, the remainder recorded in subsequent months. The effect of the change is significant on monthly data but marginal on annual data. For more information about the changed basis of compilation refer to publication *Foreign Trade Australia: Merchandise Exports, April 1992*. (5432.0)
6. All sales data are collected on an Australia-wide basis only and State figures are therefore not available.
7. The wine content of products consisting of a mixture of wine and fruit juice, commonly known as 'coolers', is included in the appropriate category of wine from which it is made, which is generally table wine. Where a wine is categorised by container type (i.e. table wine) the wine content of 'coolers' is included in the 'bulk' figure.

Seasonally adjusted and trend estimates

8. 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).
9. 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.

10. While this smoothing technique enables estimates of trend to be produced for the latest month, it does result in revisions to the estimates for the most recent months as data for subsequent months become available. Generally subsequent revisions become smaller and after 3 months have a negligible impact on the series. There will also be revisions as a result of revisions to the original series and periodic reviews of seasonal factors.

11. Users may wish to refer to the ABS Information Papers *A Guide to Smoothing Time Series - Estimates of 'Trend'* (1316.0) and *Time Series Decomposition - An Overview* (1317.0) for more detailed information on smoothing of seasonally adjusted time series data.

Related publications

12. Other ABS publications which may be of interest include:

Manufacturing Production, Australia, Food, Drink, Tobacco, Stock and Poultry Food (8359.0) - issued monthly, contains production statistics for wine based mixed drinks ('coolers').

Wine Production: Australia and States (8366.0) - includes stocks of Australian wine and brandy held by winemakers.

13. 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 *Publications Advice* (1105.0) which lists publications to be released in the next few days. The Catalogue and Publications Advice are available from any ABS office.

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
14. Where figures have been rounded, discrepancies may occur between sums of the component items and totals.

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