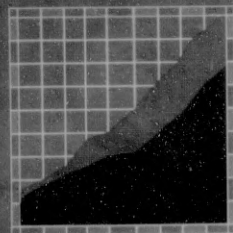


Statistics Weekly

Thursday, 20 June 1991

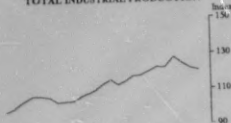
The week in statistics ...

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INDUSTRIAL PRODUCTION INDEX
Seasonally adjusted at constant prices
1984-85 = 100

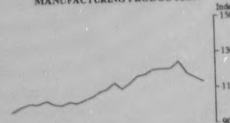
TOTAL INDUSTRIAL PRODUCTION



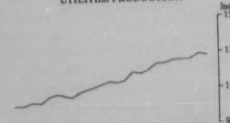
MINING PRODUCTION



MANUFACTURING PRODUCTION



UTILITIES PRODUCTION



Industrial production slump eases

The constant price value of industrial production continued to decline in the March quarter 1991 in seasonally adjusted terms, by a slight 0.7 per cent, following larger falls in the three previous quarters.

The 'industrial sector' covers mining, manufacturing, and utilities (electricity, gas and water). The industrial production index, dominated by movements in the manufacturing industry, was 5.8 per cent lower than the peak recorded in the March quarter 1990.

The seasonally adjusted index for the mining industry fell by 1.7 per cent in the March quarter following larger falls in the two previous quarters. The index was 3.2 per cent lower than that recorded in the March quarter 1990, with growth only in the first of these four quarters.

The manufacturing production index fell marginally (by 0.3%), following larger falls in the preceding three quarters, to record its fourth consecutive fall. Since the March quarter 1990, the index has fallen by 8.6 per cent.

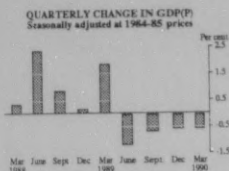
The index recorded equal numbers of rises and falls for the twelve industry subdivisions of manufacturing in the March quarter. The largest decline was 9.4 per cent for the transport equipment industry, following significant falls in the three previous quarters. Production in this industry was at the lowest level recorded since the quarterly constant price series began in September 1976. The largest increase was an 8.3 per cent rise in the basic metal products industry following moderate falls in the preceding five quarters.

Compared with the March quarter 1990, ten of the component manufacturing industries recorded falls. The only industry to record growth over this period was the food, beverages and tobacco industry (up 3.0%).

The utilities sector recorded a slight fall of 0.6 per cent in the March quarter 1991, the first since a similar fall two years earlier. The trend series has recorded continuous growth since 1982-83.

INDUSTRIAL PRODUCTION, MARCH QUARTER 1991
Seasonally adjusted at average 1984-85 prices
Percentage change

	From previous quarter	From corresponding quarter of previous year
Mining (excluding services to mining)	-1.7	-3.2
Manufacturing	-0.3	-8.6
Electricity, gas and water	-0.6	2.0
<i>Total industrial production</i>	<i>-0.7</i>	<i>-5.8</i>



Production-based GDP declines further

Production-based gross domestic product (GDP(P)) fell for the fourth consecutive quarter in March 1991, declining by 0.6 per cent in seasonally adjusted constant price terms. In the three previous quarters — June to December 1990 — GDP(P) declined by 1.2, 0.7 and 0.6 per cent, respectively. The two other independent measures of GDP, GDP(I) and GDP(E), showed virtually no change in March quarter 1991, growing by only 0.1 and 0.3 per cent, respectively.

The average of these three measures (GDP(A)) also showed little change in the March quarter, declining by 0.1 per cent. GDP(A) is a smoother, and probably better, indicator of short-term movements in GDP. The virtually static result in March followed quarterly declines of 0.7 per cent in June 1990 and 0.9 per cent in September 1990 and a rise of 0.2 per cent in December 1990.

The decline in industry output was widespread with only two of the twelve industry divisions recording any increase: communications, an industry subject to erratic quarterly growth (7.1%); and community services (2.1%). Of the ten industry divisions which declined in the March quarter, the most notable were agriculture, forestry and fishing (3.0%); transport and storage (3.5%); and construction (2.1%) which recorded the largest annual decline (10.2% since March 1990).

Manufacturing, the largest industry division, has declined in each of the last four quarters. In the March quarter 1991, production fell by 0.3 per cent compared with December quarter 1990 and by 8.6 per cent compared with March quarter 1990. Only food, beverages and tobacco, the largest subdivision, has displayed steady growth over the last year (3.0%). The most dramatic decline has occurred in the transport equipment subdivision, down 30.6 per cent between March quarter 1990 and March quarter 1991.

GROSS PRODUCT, MARCH QUARTER 1991
Seasonally adjusted estimates at average 1984-85 prices

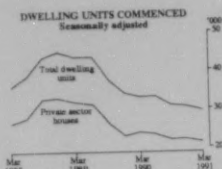
Industry	Gross product (\$ million)	Percentage change from	
		Previous quarter	Corresponding quarter of previous year
Manufacturing	10,771	-0.3	-8.6
Wholesale and retail	9,804	-1.7	-4.7
Community services	7,930	2.1	2.1
Finance, property and business services	7,562	-0.6	-3.9
Mining	4,931	-1.8	-2.6
Construction	4,124	-2.1	-10.2
Transport and storage	3,158	-3.5	-5.8
Agriculture, forestry, fishing and hunting	2,647	-3.0	6.5
Recreation, personal and other services	2,525	-0.9	-0.9
Electricity, gas and water	2,448	-0.4	2.3
Public administration and defence	2,297	-1.4	-0.9
Communication	1,924	7.1	8.2
Other (ownership of dwellings, import duties, etc.)	4,822	0.6	3.1
Gross domestic product (GDP(P))	64,943	-0.6	-3.0

Unless otherwise indicated these comments are based on seasonally adjusted constant price estimates. For further information, order the publication Australian National Accounts Gross Product, Employment and Hours Worked (5222.0), or contact Alan Trude on (06) 252 6801.

Housing starts lowest since 1987

Total dwelling unit commencements declined in March 1991 for the third consecutive quarter, the lowest level of commencements since June quarter 1987.

In seasonally adjusted terms, the number of dwelling units commenced in the March quarter 1991 (29,510) declined by 3.3 per cent from the December quarter 1990 figure of 30,520 and was 10.6 per cent lower than the March quarter 1990 estimate of 33,010.

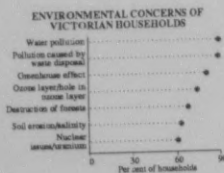


In original terms, the total number of dwelling units commenced in the March quarter was 27,450 which was 13.7 per cent lower than the December quarter 1990 figure of 31,810. Every State and Territory recorded substantial decreases. Comparing March quarter 1991 commencements with March quarter 1990, falls of 27.2 per cent in Victoria and 35.0 per cent in Western Australia stood out.

For further information, order the publication *Building Activity, Australia: Dwelling Unit Commencements, Preliminary (8750.0)*, or contact Paul Seville on (06) 252 6067.

New survey measures Victorians' attitudes to the environment

Victorians are environmentally conscious. This was revealed by a survey of community participation in energy conservation carried out by the Victorian Office of the ABS in October 1990. The survey reported on the energy conservation practices, and attitudes to various conservation issues, of a random sample of about 5,500 Victorian households.



The two environmental issues Victorians were most concerned about were water pollution (90% of respondents) and pollution caused by waste disposal (89%). It may be a surprising that these issues were of more concern than such high media profile issues as the greenhouse effect, ranked third at 81 per cent, and the ozone layer, fourth at 75 per cent. For a nation of city dwellers there was a high awareness of salinity and soil erosion, which was ranked sixth at 63 per cent. Uranium and nuclear issues were seventh at 61 per cent. Less than 3.5 per cent said they were unconcerned about any of these issues.

Generally the 35-45 year old age group showed the highest level of concern and the 65 years and over the lowest. Even in the older person age bracket, concern on any particular issues did not fall below 50 per cent. Conservation therefore does not appear to be a purely young persons' issue.

The survey also measured the practical action Victorians were willing to take on environmental issues. It found 78 per cent of Victorians were prepared to recycle and 69 per cent were willing to conserve energy in the home. However, while 66 per cent said they were prepared to plant more trees, only 5 per cent used compact fluorescent bulbs and 15 per cent used a water saving shower head.

The ABS provides a special data service which allows customised detailed tables to be prepared from the database created by this statistical collection. For further information, order the publication *Community Participation in Energy Conservation, Victoria (4120.2)*, or contact Ms Soe Kong on (03) 615 7350.

Retail turnover slows



Trend estimates of turnover for retail and selected service establishments have weakened, due to a sharp fall in seasonally adjusted turnover in April. Trend turnover increased by an average of only 0.1 per cent per month for the three months ended April 1991. The average monthly growth rate for the year ended April 1991 was only 0.2 per cent per month.

The weakening of the growth rate was largely due to the grocery industry in which the seasonally adjusted turnover fell by more than 5 per cent in April 1991. This has led to a substantial weakening of the trend growth rate, which averaged only 0.2 per cent increase per month over the three months ended April. Clothing stores have weakened slightly with an average growth rate of 0.6 per cent per month over the last three months. Department stores, as well as hotels, licensed clubs and liquor stores, are in decline.

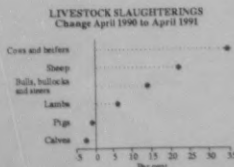
RETAIL TURNOVER
Percentage change in trend estimates

	Original value in April 1991 \$ million	Average monthly increase for 3 months to April 1991	April 1991 over April 1990
Grocers, confectioners, tobacconists	2,051	0.2	-7.7
Hotels, liquor stores, licensed clubs	947	-0.3	-0.6
Department and general stores	741	-0.1	0.7
Clothing and fabrics stores	552	0.6	5.1
Other industries	2,812	n.a.	n.a.
All industries	7,103	0.1	2.3

Average growth in the trend estimates of turnover for the three months to April show that New South Wales and Queensland were experiencing weak to moderate growth. For Tasmania the growth rate was weak whilst turnover in Victoria, South Australia and Western Australia was in decline. The only strong growth was recorded in the Australian Capital Territory.

For further information, order the publication *Retail Trade, Australia* (8501.0), or contact Bill Powell on (06) 252 6132.

April livestock figures



April 1991 livestock slaughterings increased in all categories except sheep and pigs when compared with March 1991. Calf slaughterings increased by 33.8 per cent this month, a seasonal movement relating to the commencement of the new calving season. However, this figure is 2.9 per cent lower than that of April 1990.

Total red meat production for April shows a marginal decrease (0.2%) on last month but increased by 4.9 per cent in seasonally adjusted terms. For the ten months ended April 1991, red meat production was 2,241 thousand tonnes, up 3.5 per cent on the same period last year.

Receipts of taxable wool by brokers and dealers in April 1991 decreased by 1.3 per cent compared with March, an increase of 17.0 per cent in seasonally adjusted terms.

For further information, order the publication *Livestock Products, Australia* (7215.0), or contact Elaine Hill on (06) 252 5337.

Inquiries

The ABS supplies a wide range of statistical information:

- ☐ through its bookshops
- ☐ by mail order (including subscription)
- ☐ by facsimile
- ☐ electronically.

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Suggestions

Any suggestions for improvement to this publication should be addressed to:

Robert Nixon
Editor
Statistics Weekly
(06) 252 6104

All the week's releases: 12 to 18 June

General

Publications Issued in May 1991 (1102.0; \$5.50)

Replacement pages: Australian Harmonized Export Commodity Classification (Based on the Harmonized Commodity Description and Coding System), 1 July 1991 (1233.0; free)

Statistics Weekly, 13 June 1991 (1318.0; \$4.00)

Economic Indicators, Qld, June 1991 (1307.3; \$6.00)

Summary of Statistics, NT, March Qtr 1991 (1305.7; \$8.50)

Territory Business Indicators, June 1991 (1307.7; \$4.00)

Demography

Causes of Death, Vic., 1989 (3302.2; \$7.50)

Social statistics

Court Statistics, Tas., 1990 (4508.6; \$10.50)

National accounts, finance and foreign trade

Australian National Accounts: Gross Product, Employment and Hours Worked, March Qtr 1991 (5222.0; \$9.00)

Imports, Aust., Monthly Summary Tables, April 1991 (5433.0; \$9.00)

Exports, Aust., March Qtr 1991 (5434.0; \$18.00)

Commercial Finance, Aust., March 1991 (5643.0; \$5.50)

Labour statistics and prices

Labour Statistics, Aust., 1989 (6101.0; \$25.00)

Award Rates of Pay Indexes, Aust., April 1991 (6312.0; \$10.00)

Agriculture

Principal Agricultural Commodities, WA, 1989-90 Season, Preliminary (7111.5; \$10.00)

Value of Agricultural Commodities Produced, WA, 1989-90 Season (7503.5; \$15.00) — *new issue*

Principal Agricultural Commodities, Tas., 1990-91, Preliminary (7111.6; \$10.00)

Secondary industry and distribution

Quarterly Indexes of Industrial Production, Aust., March Qtr 1991 (8125.0; \$10.00)

Manufacturing Production, Aust.: Food, Drink, Tobacco, Stock and Poultry Food, March 1991 (8359.0; \$10.00)

Manufacturing Production, Aust.: Fibres, Yarns, Fabrics, Bedding and Floor Coverings, March 1991 (8360.0; \$10.00)

Manufacturing Production, Aust.: Plastics, Rubber, Paints, Detergents and Industrial Chemicals, March 1991 (8362.0; \$6.50)

Retail Trade, Aust., April 1991 (8501.0; \$10.00)

Building Activity, Aust.: Dwelling Unit Commencements, March Qtr 1991, Preliminary (8750.0; \$10.00)

Dwelling Unit Commencements Reported by Approving Authorities, NSW, February 1991 (8741.1; \$10.00)

Building Approvals, Tas., April 1991 (8731.6; \$9.50)

Calendar of key releases

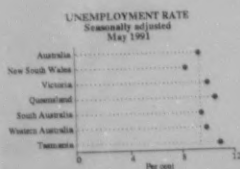
Expected releases over the fortnight to 2 July 1991

June

- 20** Housing Finance For Owner Occupation, Australia, April 1991 (5609.0; \$10.00)
- 21** Export Price Index, Australia, April 1991 (6405.0; \$7.50)
- 24** Price Index of Materials Used in Building Other Than House Building, Eight Capital Cities, April 1991 (6407.0; \$10.00)
Price Index of Materials Used in House Building, Six State Capital Cities and Canberra, April 1991 (6408.0; \$7.50)
- 25** Manufacturing Production, Australia, May 1991, Preliminary (8301.0; \$10.00)
- 26** Registrations of New Motor Vehicles, Australia, May 1991, Preliminary (9301.0; \$10.00)
- 27** Average Weekly Earnings, States and Australia, February 1991 (6302.0; \$10.00)
Job Vacancies and Overtime, Australia, June Quarter 1991 (6354.0; \$11.50)
Price Indexes of Materials Used in Manufacturing Industries, Australia, April 1991 (6411.0; \$10.00)
Price Indexes of Articles Produced by Manufacturing Industry, Australia, April 1991 (6412.0; \$10.00)

The latest ...

Changes to key State indicators — consolidated to 18 June 1991



	NSW	Vic.	QLD	SA	WA	Tas.	NT	ACT	Aust.
— Percentage change from same period previous year —									
New capital expenditure (Dec. qtr 90)*	-2.4	-28.6	-15.3	-11.7	-2.8	39.0	n.a.	n.a.	-8.6
Retail turnover (Apr. 91) (trend estimate)	3.1	-1.8	4.0	7.6	1.6	6.8	n.a.	10.9	2.3
New motor vehicle registrations (Apr. 91)†	-14.5	-49.8	11.4	-24.6	-14.6	-19.1	-9.6	20.3	-21.5
Number of dwelling unit approvals (Apr. 91)	-1.3	-12.1	16.1	3.6	14.1	10.7	-26.8	-13.8	2.7
Value of total building work done (Dec. qtr 90)	2.5	-11.1	-23.0	9.6	-25.5	-24.7	11.4	5.3	-8.5
Employed persons (May 91)†	0.0	-5.9	-2.5	-1.0	-0.4	-3.9	-2.1	-0.1	-2.3
Capital city consumer price index (Mar. qtr 90)	4.7	5.3	4.8	6.0	3.9	4.2	5.4	4.2	4.9
Average weekly earnings (full-time adult ordinary time) (Nov. 90)	6.8	7.1	9.9	8.3	7.9	6.6	9.8	8.7	7.5
Population (Dec. 90)	1.1	1.3	2.3	1.1	2.2	1.1	1.2	2.5	1.5
Room nights in licensed hotels and motels, etc (Dec. qtr 90)	-2.3	0.9	8.0	-0.7	0.3	29.3	32.8	4.6	2.8

* Seasonally adjusted except for NT and ACT. † Seasonally adjusted except for Tas., NT and ACT.

The latest ...

8

Key national indicators - consolidated to 18 June 1991

		Period	Latest figure available		Percentage change (a) on	
			Original	Seasonally adjusted	Previous period	Corresponding period last year
National production						
Gross domestic product	\$m	Mar. qtr 91	91,167	95,056	-0.4	1.0
— current prices			61,293	64,415	0.1	-1.5
— 1984-85 prices						
Industrial activity						
New capital expenditure	\$m	Mar. qtr 91	5,736	6,463	-2.9	-11.6
— current prices				4,334	-3.4	-11.5
— 1984-85 prices						
Expected new capital expenditure	"	Three months to Jun. 91	7,300	n.a.	n.a.	-10.4
Retail turnover	"	Apr. 91	7,102.7	7,350.5	-2.9	-0.3
— current prices		Mar. qtr 91	14,264.8	15,243.0	0.4	-1.3
— 1984-85 prices		Apr. 91	40,274	42,313	8.2	-21.5
New motor vehicle registrations	no.	Apr. 91	10,045	10,241	0.3	-6.9
Dwelling unit approvals	\$m	Apr. 91	1,516	1,484	-8.6	-26.4
Value of all building approvals	"	Dec. qtr 90	7,391	7,069	0.5	-8.5
Value of total building work done	"	"	4,654	4,452	0.1	-10.9
— current prices		Mar. qtr 91	31,937	34,424	-1.9	-4.7
— 1984-85 prices		"	22,162	23,833	1.5	-7.0
Manufacturers' sales	"	Three months to June 91	34,850	n.a.	n.a.	-6.2
Expected manufacturers' sales	"					
Labour						
Employed persons	'000	May 91	7,738.8	7,715.0	-0.1	-2.3
Unemployment rate †	%	"	9.5	9.4	-0.4	3.0
Participation rate †	"	"	63.5	63.2	-0.4	-0.5
Job vacancies	'000	Nov. 90	34.1	35.4	-27.8	-45.6
Average weekly overtime per employee	hours	"	1.3	1.3	-1.9	-16.2
Prices, profits and wages						
Consumer price index	1980-81 = 100.0	Mar. qtr 90	214.1	n.a.	-0.2	4.9
Price index of materials used in manufacturing industries	1984-85 = 100.0	Mar. 91	119.1	n.a.	-2.0	-2.0
Price index of articles produced by manufacturing industry	1988-88 = 100.0	Mar. 91	110.5	n.a.	-0.7	2.3
Company profits before income tax	\$m	Mar. qtr 91	2,266	2,762	-29.1	-32.0
Average weekly earnings (preliminary) (Full-time adults; ordinary time)	\$	Feb. 91	564.30	n.a.	1.6	7.5
Interest rates (b) (monthly average)	% per annum					
90-day bank bills †	"	Apr. 91	11.30	n.a.	-0.30	-3.75
10-year Treasury bonds †	"	"	11.00	n.a.	-0.40	-2.8
Balance of payments						
Exports of merchandise	\$m	Apr. 91	4,299	4,160	-7.1	0.8
Imports of merchandise	"	"	4,040	4,227	9.5	3.3
Balance on merchandise trade (c)	"	"	259	-67	n.a.	n.a.
Balance of goods and services (c)	"	"	-71	-408	n.a.	-4.5
Balance on current account (c)	"	"	-1,246	-1,699	-69.7	-7.1
Terms of trade (d)	1984-85 = 100.0	Mar. qtr 91	n.a.	98.9	-3.3	-6.5
Foreign investment						
Net foreign debt	\$m	31 Mar. 91	133,491	n.a.	2.6	3.2
Net foreign liabilities	"	"	177,337	n.a.	2.9	6.7
Exchange rates (monthly average)						
US\$	per A\$	Apr. 91	0.7798	n.a.	1.0	2.1
Trade weighted index	May 1970 = 100.0	"	59.5	n.a.	2.4	-1.7
Other indicators						
Population (resident at end of qtr)	million	Dec. 90	17.2	n.a.	0.4	1.5
Overseas visitor arrivals	'000	Dec. 90	253	176	0.7	4.1

(a) Based on seasonally adjusted figures where available. (b) Source: Reserve Bank of Australia. (c) For percentage changes, a minus sign indicates an increase in the deficit; no sign means a decrease in the deficit or an increase in the surplus. (d) The ratio of the price of goods and services for exports to that for imports.

NOTES: † = change is shown in terms of percentage points. n.a. = not available. Figures have been taken from a variety of ABS publications. Copies may be obtained from Information Services (see page 6). Some of the figures shown are preliminary, some final, and some are revisions of previously published figures. Users should check the latest relevant publication or with the ABS Information Services if the status of the statistic is important.

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