

Chapter 17

MANUFACTURING

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Chapter 17

MANUFACTURING

Manufacturing, despite a decline in relative importance over the past decade, remains one of the main contributing sectors of the Tasmanian economy. It accounts for 18 per cent of the State's gross domestic product at factor cost, second to the government-dominated public administration, defence and community sector. In employment terms manufacturing employs around 16 per cent of Tasmania's employed persons. The manufacturing sector paid just over 19 per cent of the total estimated wages and salaries paid by all industry sectors in Tasmania in 1987-88.

Since 1975-76 the value added by manufacturing has risen from \$16.4 million to \$50.7 million. Per employee the increase has been doubled, 25 per cent more than the increase paid in wages and salaries, indicating increased productivity over the period.

17.1 KEY AGGREGATES PER EMPLOYEE: MANUFACTURING (\$)

Year	Wages and salaries	Turnover	Value added
1975-76	7 610	37 100	16 430
1976-77	8 860	43 190	19 210
1977-78	9 580	46 210	18 470
1978-79	10 210	53 770	21 080
1979-80	11 400	63 310	24 990
1980-81	13 060	70 380	26 890
1981-82	14 340	73 540	27 630
1982-83	16 100	81 730	28 860
1983-84	16 910	90 640	34 200
1984-85	18 090	98 920	38 290
1986-87 (a)	21 640	125 380	50 750

(a) No census 1985-86; 1986-87 latest year of full manufacturing census.

Over the same interval, turnover per employee has increased by 238 per cent from \$37 100 to \$125 380.



'Christopher Columbus' (renamed 'Hoverspeed Great Britain') built by International Catamarans being launched at Prince of Wales Bay in January 1990. Photo: Mercury

In June 1990 the revolutionary seacat broke the record for the fastest trans-Atlantic crossing by a passenger service slashing 2 hours 45 minutes off the previous record set by 'SS United States' in 1952.

Over the period, employment in the Tasmanian manufacturing industry has fallen by 12 per cent from 27 800 to 24 300 in 1986-87. Since 1982-83 the downward trend in employment levels appears to have stabilised at around the 24 400 persons level. The fall in employment levels has not been confined to any one particular manufacturing sub-division - it has been general across all divisions.

17.2 EMPLOYMENT IN MANUFACTURING

Year ended 30 June	At 30 June	Average over the whole year
1983	23 853	24 085
1984	24 692	24 497
1985	24 573	24 494
1987	24 371	24 327
1988	24 640	n.a.

17.1 MANUFACTURING ACTIVITY

Three industry sub-divisions account for the lion's share of manufacturing in Tasmania; food and beverages; wood, wood products and furniture; and paper, paper products, printing and publishing. Together these sub-divisions account for over 60 per cent of manufacturing turnover and just under 60 per cent of all employment in the sector.

17.3 MANUFACTURING ACTIVITY BY INDUSTRY SUB-DIVISION 1986-87

ASIC sub-division	Average employ- ment ('000)	Turnover (\$'000)	Value added (\$m)
Food, beverages and tobacco	5.5	825.2	289.2
Textiles	n.p.	n.p.	n.p.
Clothing and footwear	0.7	29.6	13.5
Wood, wood products and furniture	3.5	399.0	163.6
Paper, paper products, printing and publishing	5.2	685.0	326.8
Chemical, petroleum and coal products	n.p.	n.p.	n.p.
Non-metallic mineral products	0.9	117.5	48.4
Basic metal products	n.p.	n.p.	n.p.
Fabricated metal products	1.6	123.0	51.7
Transport equipment	0.7	49.8	25.8
Other machinery and equipment	0.3	53.5	30.7
Miscellaneous manufacturing	0.4	40.6	17.1
Total	24.4	3 050.2	1 236.5

The food, beverages and tobacco sub-division accounts for 23 per cent of manufacturing employment. Vegetable processing, abattoirs and meat processing, brewing and confectionery are the main manufacturing activities within this sub-division.



Pea processing at Edgells.

Photo: Tasmap Photographics

The paper products sub-division accounts for approximately the same amount of employment as the food and beverage industries, but employment in this sub-division is almost entirely dominated by paper manufacture, 67 per cent of all employment in the sub-division.

The wood, wood products and furniture sub-division is appreciably smaller in terms of employment and turnover. As with the other two sub-divisions, there is a concentration on particular industries, in this case on factories producing sawn timber and woodchips.

17.2 CONCENTRATION OF MANUFACTURING

Manufacturing in Tasmania is dominated by a few large manufacturing establishments. In 1988 five establishments (less than one per cent of the total) accounted for 22 per cent of persons employed at 30 June 1988, 27 per cent of wages and salaries paid during 1987-88 and 26 per cent of manufacturing turnover.

Of the major employing industry sub-divisions the most even spread occurs in the wood, wood products and furniture sub-division where the smaller establishments (those employing less than 20) accounted for almost 30 per cent of employment. In the paper, paper products and printing sub-division five per cent of establishments were responsible for 62 per

17.1.1 Food and Beverages

Cadbury Schweppes Australia Ltd (Claremont). In 1921 an association of three British confectioners established their Australian plant at Claremont, near Hobart. Today the company is wholly owned by a single UK parent. The plant is the largest cocoa and confectionery factory in Australia. The factory employs about 1000 people and specialises in moulded chocolate blocks, fancy boxed assortments, cocoa, drinking chocolate, the well known Flake, Turkish Delight Bars and Twirl.

Some 30 million litres of fresh Tasmanian milk are used each year, most of which is collected and processed at Cadbury's Burnie dairy factory. Recent investment has occurred with the transfer of product lines resulting in additional employment opportunities in Tasmania.

Cascade Group of Companies (Statewide). The company is the oldest manufacturing company in Australia and is firmly established in the beverage industry at manufacturing, wholesale and retail levels. The company manufactures alcoholic beverages at Esk Breweries, Launceston (Boags Beer) and Cascade Brewery, Hobart (Cascade Beer). Cascade has a capacity of 55 million litres. New owners Wilson Neill Ltd are focusing on mainland and overseas penetration for their brands especially Cascade Premium.

The Cascade Fruit Juices Division manufactures alcoholic cider under the brand names Mercury and Van Dieman, and also Apple Isle non-alcoholic cider, Ultra-C blackcurrant vitamin C syrup, soft drinks, pure fruit juices, fruit juice syrups, berry fruit pulps and concentrations for local and export distribution.

Cascade has the largest wine and spirits wholesaling operation in the State with major outlets in Hobart, Launceston and Ulverstone. The company owns hotels spread throughout the State, and has a joint venture with Elders IXL to operate hotels in Queensland.

Edgell-Birds Eye Division of Petersville Industries Ltd (Devonport, Ulverstone and Scottsdale). This company is Tasmania's leading processor of frozen and canned vegetables. An annual volume of approximately 207 000 tonnes of raw materials is required by the Devonport, Ulverstone and Scottsdale factories. Crops processed include potatoes, green peas, green beans and carrots.

McCain Foods (Aust.) Pty Ltd (Smithton). The Canadian parented McCain group purchased the Smithton factory of General Jones in June 1984.

The factory produces frozen vegetables, of which the main brands are Copper Kettle, Pict and McCain. A french fry section opened in April 1989. Capacity is expected to be increased by a further 25 per cent to meet increasing demand for frozen vegetables in a \$5 million upgrade to be completed in the early 1990s. McCain employs 300 full-time staff with up to 300 part-time staff in peak periods.

United Milk Tasmania Ltd (Smithton, Wynyard, Devonport, Legerwood). UMT is the State's largest manufacturer of dairy products and processes 200 million litres of milk a year. Annual production in 1987-88 included: butter (salted and unsalted) 4040 tonnes, cheese (cheddar) 10 100 tonnes, milk powders (skim, full cream and buttermilk) 7000 tonnes.

The company also produces milk concentrates and operates retail produce/hardware stores and a farm machinery business servicing rural areas. In 1989 the company through a joint venture with Tasmanian business, expanded its range to shelf stable beverages and foods.

Lactos. After operating in Tasmania in 1953, Lactos was acquired by the French company, Bongrain, in 1981. A renewed focus by management on marketing and product development has led Lactos away from static 'hard' cheese markets to high quality specialty 'soft' products and in the process secured a financial turnaround.

Bongrain opened a soft ripened cheese factory at Burnie in 1985. In 1989 these operations were extended at a cost of \$2 million doubling soft ripened cheese production to 600 tonnes per annum.

Lactos has 50 per cent of the Australian soft cheese market. Export markets to Japan, Malaysia, Indonesia, United States and the French speaking Tahitians and Noumeans have developed.

The Company is expanding its product line of nine specialty cheeses with the introduction of a mild Brie 'Heart of Brie' targeted at Australian tastes, 'Tasmanian True Blue' a blue vein cheese, whipped cream cheese for the Japanese market, and a range of goats milk cheese.

cent of employment. In the same sub-division nine per cent of establishments accounted for over three quarters of employment and 84 per cent of turnover.

17.4 NUMBER OF ESTABLISHMENTS BY EMPLOYMENT SIZE: 30 JUNE 1988 (a)

Employment category	Establishments		Employment	
	No.	Per cent	No.	Per cent
< 20	483	70.4	3 808	15.4
20 < 50	108	15.7	3 275	13.3
50 < 100	47	6.9	3 250	13.2
100 < 200	28	4.1	3 784	15.4
200 < 500	15	2.2	5 041	20.5
500 and over	5	0.7	5 482	22.2
Total	686	100.0	24 640	100.0

(a) Employment at 30 June.

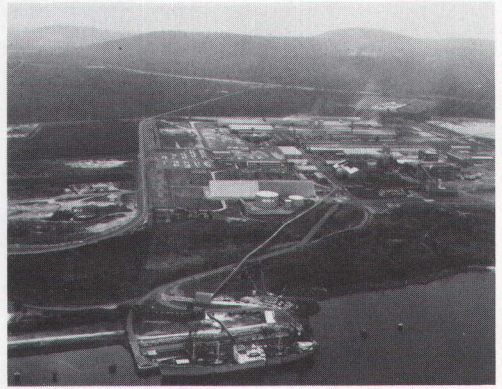
17.3 GEOGRAPHICAL DISTRIBUTION

The geographic distribution of Tasmania's manufacturing activity, as to be expected, corresponds to the population distribution.

The Greater Hobart Statistical Division is the major centre of manufacturing. In 1987-88 this region accounted for 35 per cent of employment, 32 per cent of wages and salaries paid and

34 per cent of turnover generated by manufacturing. The main manufacturing activities in this region included paper manufacture, metal refining, confectionery, brewing, printing, clothing, textile and footwear.

The Greater Launceston Statistical Sub-division, which stretches north along each side of the Tamar River, had 27 per cent of the State's manufacturing employment at the end of 1987-88. Important industries in the area included alumina smelting, textiles and clothing, woodchip production, sawn timber and printing.



Comalco.

Photo: Tasmap Photographics

The other main industry concentration is along the north-west coastal strip from around Latrobe to Wynyard. Major industries in this area include paper manufacture, food processing (particularly vegetables), timber processing and furniture. The food processing and paper manufacturing industries account for almost 60 per cent of industry employment in this region.



Cascade Brewery.
Photo: Tasmap Photographics



17.1.2 Textiles, Clothing and Footwear

Coats Patons (Aust) Ltd (Launceston).

This company first produced yarns in Tasmania over 60 years ago. The factory produces knitting yarns, both wool and synthetic, and annual production is approximately 1.5 million kilograms.

Sheridan Textile Industries Australia (Derwent Park).

The Sheridan Domestic Textiles mill commenced operations in 1948. Production now involves the preparation, dyeing and printing of mainly polyester/cotton percale bed sheeting along with some commission printing. The mill also manufactures a full range of quality made-up domestic bed linen and shower curtains for Australian and export distribution.

Bonds Weaving Mills (Devonport).

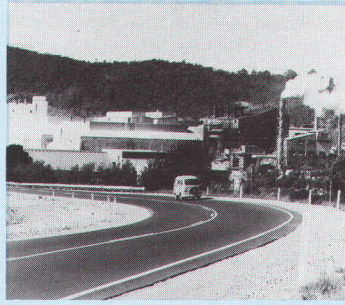
This mill specialises in the manufacture of terry towelling. In 1989 the Company was reported to have spent \$5.2 million in expansion and upgrading its Devonport Plant. The mill has now incorporated 'state of the art' computer technology including a nappy machine imported from Japan. The developments are part of the Company's transfer of its establishment operation from Victoria and the creation of 220 jobs.

Gazel Productions (Tas.). Located in a \$5 million factory at Glenorchy they produce men's and boys' board shorts and men's shirts and currently employs 110 people.

Blundstone Pty Ltd. Manufacturers of industrial, work, safety, and bushwalking footwear for interstate and overseas markets, mainly the Pacific basin and Europe. Founded in 1870 in Hobart the company moved to its present location at Moonah in 1980. Blundstone Pty Ltd has two subsidiary companies. One manufactures gumboots and the other is a tannery. The company has won a design award for specially designed spike soled forestry safety boots as well as an export award for excellence in expansion of export sales.

17.1.3 Wood, Wood Products, Paper, Paper Products

Associated Pulp and Paper Mills (Burnie, Wesley Vale, Long Reach, Triabunna). This group of companies is a wholly-owned subsidiary of North Broken Hill Holdings Ltd. It is Australia's principal producer of fine printing and writing papers, magazine papers and coated papers. In Tasmania, the company operates major manufacturing complexes at five centres:



APPM.
Photo: Tasmap
Photographics

Burnie - commenced paper production in 1938. Present annual capacity of the Burnie pulp and paper plant is 130 000 tonnes, also located at Burnie is a veneer production facility and sawmill.

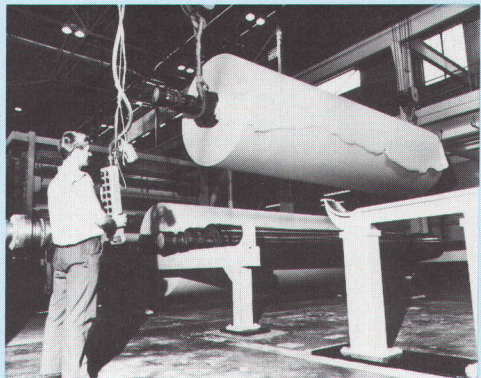
Wesley Vale - (Opened 1970). An integrated pulp and paper complex. The plant has an annual capacity of about 65 000 tonnes of paper. Most production at Wesley Vale is for magazine papers. A particle board factory also operates at Wesley Vale, annual production is about 15 million square metres.

Long Reach - (Opened 1972). Woodchip plant. The company has long-term contracts for the export of woodchips to Japan.

Triabunna - APPM operates a woodchip export mill at Triabunna and also has long-term contracts with Japan.

Wynyard - sawmill operation.

Australian Newsprint Mills Ltd. (Boyer). Began operations in 1941. Newsprint capacity is now 220 000 tonnes annually. The company is jointly owned by Fletcher Challenge and News Corporation. The company also operates a



ANM newsprint mill (Boyer).

17.5 REGIONAL MANUFACTURING 1987-88 (a)

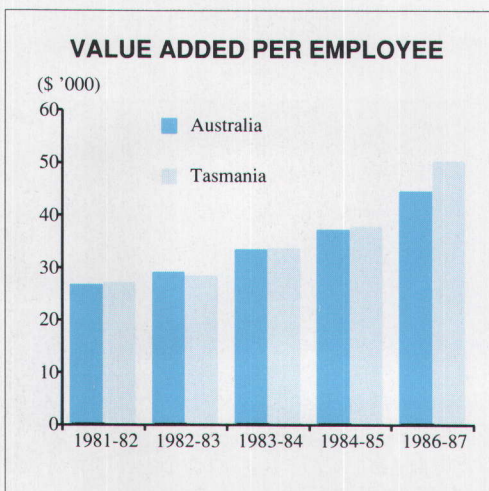
Statistical division	Employment 30 June	Turnover (\$m)
Greater Hobart	8 840	1 109
Southern	1 009	168
Northern	7 567	884
Mersey-Lyell	8 034	1 105
Tasmania	25 450	3 266

(a) Includes single establishment enterprises employing fewer than four persons.

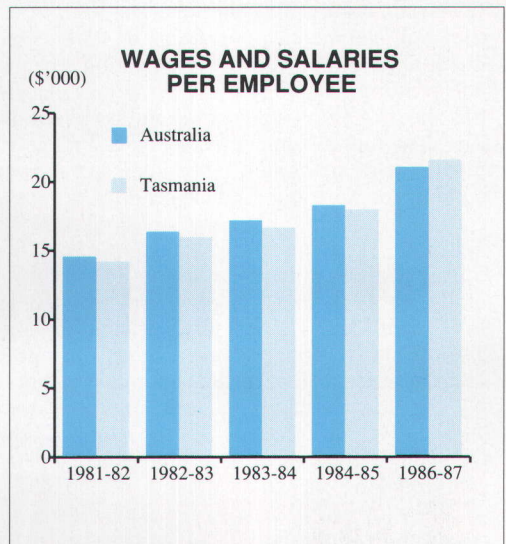
Other timber-based industries (sawn timber, veneer manufacture and furniture) account for a further 12 per cent of manufacturing employment in the Burnie-Devonport statistical subdivision.

17.4 NATIONAL COMPARISON

Over the period 1981-82 to 1986-87 (the latest year of a fully detailed manufacturing census), the Tasmanian manufacturing sector has out-performed the total Australian sector. Nationally, over the period, manufacturing employment fell by 12 per cent, while in Tasmania the fall was just under six per cent. In terms of value added per employee (at current prices) Tasmanian manufacturing registered an increase of 84 per cent, while nationally the rise was only 65 per cent. The percentage increases in total value added were: Tasmania 73 per cent and Australia 45 per cent.



Tasmanian manufacturing value added per employee in 1986-87 was \$50 830 compared with an Australian figure of \$44 920, or 13 per cent higher. Wages and salaries paid per employee in Tasmania for 1986-87 were also marginally above the Australian average - \$21 640 compared with \$21 180.



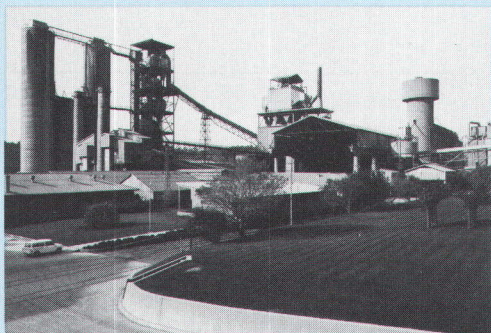
In terms of industry structure one of the more noticeable differences between Tasmanian and Australian manufacturing is the importance of the sectors based primarily on utilisation of timber resources. Nationally the wood, wood products and furniture and paper, paper products, printing and publishing sub-divisions account for around 17 per cent of the value added by manufacturing and 18 per cent of employment in manufacturing. In Tasmania these two industry sub-divisions are responsible for almost 40 per cent of value added by manufacturing and 36 per cent of employment. Another considerable difference in industry structure is the limited contribution made by the transport sector to Tasmanian manufacturing. In 1986-87 this sector contributed only two per cent to total value added and was responsible for around three per cent of manufacturing employment.

Nationally, the sub-division, which includes the motor car making industry, accounted for nine per cent of value added by manufacturing and almost 11 per cent of manufacturing employment.

newsprint mill at Albury in New South Wales with an output of 180 000 tonnes per annum. ANM is Australia's only producer of newsprint and currently supplies approximately 55 per cent of Australia's requirement. The Boyer plant is being upgraded to improve environmental controls, to increase profits and long term job security.

17.1.4 Non-Metallic Mineral Products

Goliath Portland Cement Co. Ltd (Railton). This company has been involved in cement production in Tasmania since 1928. In 1980 a new plant was installed making Goliath one of the most efficient producers of cement. The company operates its own 4000 tonne ship the *M.V. Goliath* to transport bulk cement to mainland markets. Goliath has also been exporting palletised bagged cement to Papua New Guinea and other Pacific Island destinations since 1970. In 1989, a joint venture company owned by CSR and Pioneer took control of Goliath. The plant is now expected to be operated at its full capacity of one million tonnes per annum. Goliath also operates Besser Bricks and the Cornwall Coal Mine.



Goliath cement factory.

Photo: Tasmaphotographics

17.1.5 Basic Metal Products

Comalco Aluminium (Bell Bay) Ltd (George Town). Australia's first aluminium smelter commenced production in 1955 at Bell Bay, with an annual capacity of 12 000 tonnes of metal. In 1961, the plant and facilities were acquired by the present company and the capacity increased in stages to 117 000 tonnes per annum. Products made include rolling block, extrusion billet, foundry alloy ingot, T-bar alloy, and primary metal as ingot, T-bar, and granules. Comalco Aluminium Powder, produces aluminium powder, aluminium paste, and high alloy metal powder briquettes.

Southern Aluminium

The world's most advanced alloy wheel plant was officially opened at Bell Bay at a ceremony marked by the signing of a \$3.5 million contract with BMW. The \$50 million Southern Aluminium plant will eventually produce 600 000 alloy car wheels a year for the international car industry. The plant utilises molten aluminium from the adjoining Comalco smelter at great cost savings and is expected to earn Australia \$30 million a year in exports. The joint Australian-Japanese venture has negotiated a contract with Japanese car maker Mitsubishi and a massive \$20 million deal with Nissan. The Bell Bay factory, to employ 150 people, is a joint venture between Comalco (51 per cent), the Australian Industries Assistance Commission (19 per cent), Mitsubishi and the world's largest alloy wheel maker, Enkei (15 per cent each). The plant has also provided more jobs indirectly with a Branxholm sawmill earning an extra \$250 000 and securing 31 jobs from an order to supply pallets to Southern Aluminium.

Pasminco Metals - EZ (Risdon and Rosebery). Established in 1916, the factory at Risdon is the largest producer of zinc in Australia and the second largest electrolytic zinc plant in the world. It exports an extensive range of zinc and zinc alloys to over 30 countries. The Risdon plant has the capacity to produce more than 600 tonnes of zinc per day. Apart from the zinc and zinc alloys, the company also produces cadmium, sulphuric acid, superphosphate, and ammonium sulphate. The zinc plant supplies a large proportion of Australia's total requirements. The company has commenced a major modernisation program to be completed by 1992. In 1989 the Risdon plant received its



Pasminco Metals - EZ Risdon.

Photo: Tasmaphotographics

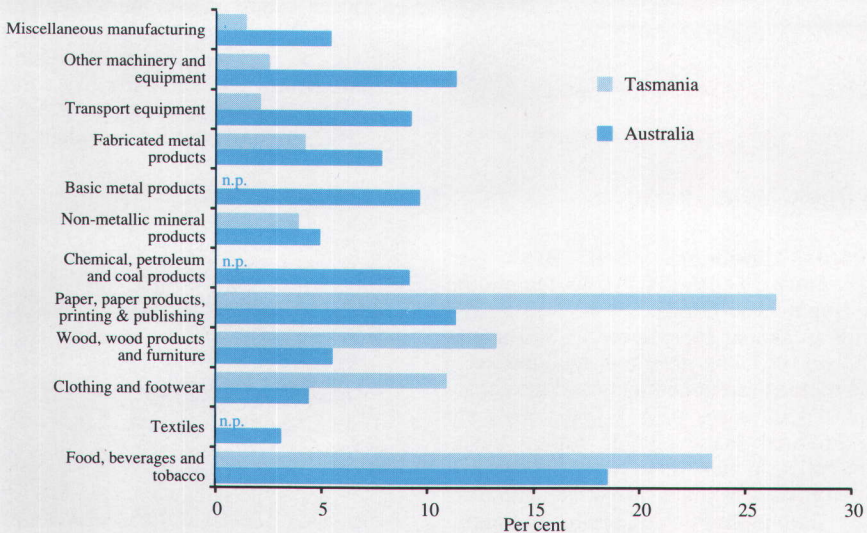
Nationally around 27 per cent of persons employed in the manufacturing industry are women. The proportion of women employed in manufacturing has increased by around two percentage points over the period 1981-82 to 1986-87. In Tasmania the proportion of women

in the manufacturing workforce is much lower than the national average. In 1986-87 the proportion was 20 per cent. However, this is three percentage points higher than the proportion in 1981-82.

**17.6 COMPARISON OF TASMANIAN AND AUSTRALIAN MANUFACTURING 1986-87:
PROPORTION OF TOTAL EMPLOYMENT AND VALUE ADDED
(Per Cent)**

ASIC sub-division	Tasmanian		Australian	
	Employment	Value added	Employment	Value added
Food, beverages and tobacco	22.8	23.4	16.5	18.5
Textiles	n.p.	n.p.	3.3	3.1
Clothing and footwear	2.7	10.9	7.2	4.4
Wood, wood products and furniture	10.2	13.2	7.3	5.5
Paper, paper products, printing and publishing	21.2	26.4	10.5	11.3
Chemical, petroleum and coal products	n.p.	n.p.	5.3	9.1
Non-metallic mineral products	3.5	3.9	3.9	4.9
Basic metal products	n.p.	n.p.	7.3	9.6
Fabricated metal products	6.5	4.2	9.4	7.8
Transport equipment	2.9	2.1	11.0	9.2
Other machinery and equipment	3.4	2.5	12.5	11.3
Miscellaneous manufacturing	1.8	1.4	5.9	5.4

MANUFACTURING 1986-87: VALUE ADDED



first load of Hellyer zinc concentrate. Mine production capacity at the company's west coast mines at Rosebery is 650 000 tonnes of silver-lead-zinc-copper-gold ore per annum. The associated concentrating mill at Rosebery has capacity to treat 850 000 tonnes of ore per annum including treatment of ore from the Que River Mine.

Tasmanian Electro-Metallurgical Co. Pty Ltd (Bell Bay). In 1962 BHP transferred its major alloy making from Newcastle to Bell Bay. Expansion in 1976 gave export capacity and added ferro-silicon and manganese ore sinter to the existing product range of high carbon ferro-manganese and silico-manganese. A significant proportion of production is being exported to steelmakers and foundries in South-East Asia, the Middle East, Japan, United States of America and New Zealand. The company completed a \$57 million capital works program in 1987 to increase output by 40 per cent.

Tioxide Australia Pty Ltd (Burnie). This company is a manufacturer of titanium pigments which are used as the base white pigment in paints, enamels, plastics, printing inks, rubber, paper, man-made fibres and a number of other products. Ten different grades of pigment are made to meet the varying requirements of user industries. The company which was formed in 1937 as Australian Titan Products Pty Ltd, has recently undergone a \$23 million capital works program increasing production to 52 500 tonnes per annum. Tioxide is the predominant supplier of titanium pigments to the Australian market and an increasingly significant supplier to South-East Asian countries.

17.1.6 Fabricated Metal Products

Humes Ltd (Statewide). The company operates three divisions in Tasmania: Humes Concrete, producing pre-cast concrete; Humes Plastics, manufacturing UPVC and high-density polythene pipes and fittings for a wide range of uses; and Humes-ARC, producing prefabricated reinforcement mesh and rod.

ACL Bearing Company (Launceston). Established in 1949 to manufacture engine bearings for the Australian spare parts trade, the factory has since expanded and diversified its range of products and is now the only automotive bearing manufacturing company in Australia. The company also undertakes the manufacture of sintered products using powder metallurgy techniques.

Tristeel Engineering Pty Ltd. Tristeel emerged as a result of the management buy-out of the Steel Mains operation in 1986. Tristeel now produces pressure vessels, spheres, bulk storage tanks etc. A field crew operates throughout the State installing all types of structural steel, pipelines and mechanical items.

17.1.7 Transport Equipment

International Catamarans Pty Ltd (Hobart). International Catamarans specialises in commercial aluminium catamarans. The craft are mainly used as passenger ferries, although utility vessels such as oil rig tenders, light defence and patrol craft are also in service. The success of the design led to licensing of yards in other States, and in Asia, as well as the sale and exchange of related technology in Europe and North America. Local production extended to larger, higher quality vessels for export, including two 470-passenger ferries for the UK market. The local workforce includes full-time sub-contractors and apprentices. Hobart is seen as an ideal base from which developments can be tested and improved.

In July 1989 International Catamarans opened a new boatyard at Prince of Wales Bay in Hobart. The facility is large enough for three large catamarans to be built simultaneously. Senator Button who officially opened the boatyard also handed over a cheque for \$1.5 million to the company as a progress payment under the new shipbuilding bounty arrangements. The new arrangements started on 1 July 1989 and International Catamarans was the first recipient of funds under the industry assistance measure.

Ansair Kingston is owned by Ansett Transport Industries. Ansair has a bus plant at Kingston, manufacturing bus bodies and components. In 1989 the company won a Government two year contract to produce 49 buses for \$9 million. The Company is looking to win contracts to supply a new mini-bus design for New Zealand and interstate markets.

Tamar Steel Boats (Launceston). Now part of the Sea Management Corporation, Tamar Steel Boats builds ferries for local and overseas markets. The Company recently won a \$6 million contract to build a 400 passenger ferry for Bruny Island. Completed ferries include two 83-tonne, 25-metre craft, one bound for Scotland, the other for Sydney Harbour.

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