

Thursday, 29 September 1994

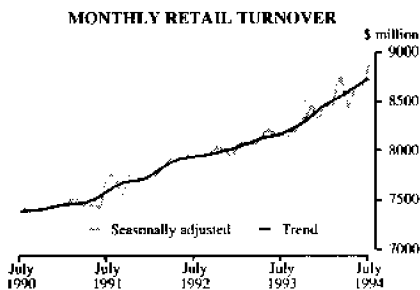
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statistics

## Retail trade growth stronger



A very big rise of 3.0 per cent in the seasonally adjusted estimate of retail turnover for July 1994 has resulted in the trend estimate of turnover strengthening to show monthly growth of around 0.5 per cent over the first seven months of 1994. The annual growth rate (July 1994 over July 1993) was 6.8 per cent.

The grocery industry, which contributes about 30 per cent of the total estimate, has shown growth of around 0.5 per cent over each of the last three months. Growth in the hotel, liquor store and licensed club industry has remained strong with average growth of over 1.0 per cent for each of the last six months. Department stores have moved into decline. Other food store and clothing and fabric store industries are also in decline. Of the remaining industries covered by the survey, electrical goods stores, furniture stores, pharmacies and newsagents were showing growth while the rest were in decline.

### RETAIL AND SELECTED SERVICE INDUSTRIES TURNOVER

	Original value in July 1994 (\$m)	Average monthly percentage change in trend estimates	
		3 months ended July 1994	12 months ended July 1994
Grocers, confectioners, tobacconists	2 530	0.5	0.4
Butchers	176	-0.2	-1.3
Other food stores	578	-0.4	1.1
<i>Total food group</i>	<i>3 284</i>	<i>0.3</i>	<i>0.4</i>
Hotels, liquor stores, licensed clubs	1 098	1.2	0.9
Department and general stores	822	0.3	0.4
Clothing and fabrics stores	535	-1.4	-0.1
Electrical stores	508	0.8	0.7
Pharmacies	470	1.1	1.6
Newsagents	292	1.3	1.2
Other industries	1 351	na	na
<i>All industries</i>	<i>8 557</i>	<i>0.5</i>	<i>0.6</i>

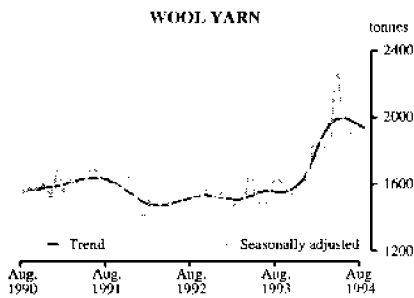
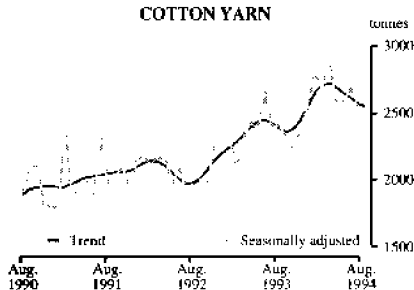
The trend estimates of turnover have shown growth for Victoria, Queensland, South Australia, Western Australia and Tasmania over recent months. New South Wales recorded zero growth in July, while the Australian Capital Territory remained in decline.

### RETAIL AND SELECTED SERVICE INDUSTRIES TURNOVER Monthly percentage change in State trend estimates

	NSW	Vic.	Qld	SA	WA	Tas.	ACT	Aust.
1994								
April	0.3	1.1	0.4	0.0	0.2	0.3	-0.6	0.5
May	0.2	1.1	0.4	0.1	0.3	0.4	-0.6	0.5
June	0.1	1.0	0.4	0.3	0.5	0.6	-0.4	0.6
July	0.0	0.7	0.3	0.4	0.4	0.4	-0.1	0.5

## Annual trends in manufacturing

The publication *Manufacturing Production, Australia, Preliminary* (8301.0) contains time series data for thirty-nine major indicators of production. The indicator commodities have been selected to give a broad industry representation of the manufacturing sector. Of the selected items, ten showed a decrease in production from 1992-93 to 1993-94 while eight showed an increase greater than 10 per cent.

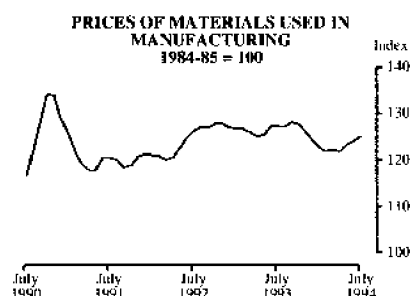


### MANUFACTURING PRODUCTION

Item	Unit	1992-93	1993-94	Percentage change
Blooms and slabs	'000 tonnes	6 218	7 627	22.6
Wool yarn	tonne	18 167	21 016	15.7
Cotton yarn	tonne	26 344	30 371	15.3
Particle board and similar boards	'000 cu m	660	752	13.9
Butter	tonne	127 291	142 657	12.1
Textile floor coverings	'000 sq m	41 030	45 916	11.9
Basic iron, spiegeleisen and sponge iron	'000 tonnes	6 445	7 210	11.9
Undressed sawn timber	'000 cu m	3 101	3 464	11.7
Cars and station wagons	number	274 643	298 108	8.5
Chicken meat	tonne	434 716	468 722	7.8
Plastics in primary forms	'000 tonnes	1 065	1 147	7.7
Cheese	tonne	210 483	225 719	7.2
Portland cement	'000 tonnes	6 225	6 647	6.8
Silver	tonne	355	377	6.2
Chocolate based confectionery	tonne	105 681	111 885	5.9
Gold	kg	288 188	305 098	5.9
Domestic clothes washing machines	number	307 671	325 604	5.8
Copper	'000 tonnes	312	329	5.4
Clay bricks	million	1 722	1 812	5.2
Electric motors	'000	2 795	2 929	4.8
Alumina	'000 tonnes	12 221	12 760	4.4
Gas available for issue through mains	terajoules	567 647	587 382	3.5
Aviation turbine fuel	megalitres	4 178	4 320	3.4
Electricity	mil k Wh	159 872	161 813	1.2
Red meat	tonne	2 797 507	2 811 390	0.5
Automotive gasoline	megalitres	17 730	17 727	0.0
Woven man-made fibre fabric	'000 sq m	185 060	184 733	-0.2
Other confectionery	tonne	68 671	68 324	-0.5
Lead	'000 tonnes	224	222	-0.9
Beer	mil litres	1 805	1 752	-2.9
Cigarettes and tobacco	tonne	24 001	23 273	-3.0
Sulphuric acid; oleum	'000 tonnes	868	833	-4.0
Wool woven fabric (including blanketing)	'000 sq m	8 343	7 893	-5.4
Zinc	'000 tonnes	333	315	-5.4
Fuel oil	megalitres	2 498	2 263	-9.4
Tin	tonne	258	186	-27.9

For further information, order the publication *Manufacturing Production, Australia, Preliminary* (8301.0), or contact Rod Smith on (03) 615 7635.

## Oil and wheat prices push up manufacturing materials index



The price index of materials used in manufacturing industries rose by 0.9 per cent in July.

Prices of imported materials rose by 1.5 per cent, mostly as a result of higher prices for crude petroleum and condensates (reflecting world oil price increases). A fall in the value of the Australian dollar against the Japanese Yen and the major European trading currencies also led to price rises in a range of items, in particular for components for machinery and equipment.

Prices for home produced materials rose by 0.5 per cent in July. The main contributors to the increase were crude petroleum and wheat. Supply shortages in the wake of the drought pushed wheat prices up 10.9 per cent in July.

Between July 1993 and July 1994 the price index of manufacturing materials fell by 1.7 per cent; home produced materials fell by 1.2 per cent and imported materials fell by 2.5 per cent.

The table below summarises the price movements.

**PRICE INDEXES OF MATERIALS USED IN MANUFACTURING, JULY 1994**  
Percentage change

Source of material	From previous month	From corresponding month of previous year
Imported	1.5	-2.5
Home produced	0.5	-1.2
All manufacturing	0.9	-1.7

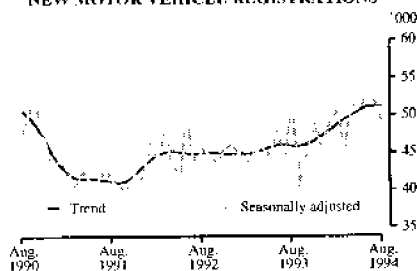
For further information, order the publication *Price Indexes of Materials Used in Manufacturing Industries, Australia (6411.0)*, or contact Geoff Brown on (06) 252 5348.

## Vehicle sales growth slows

The rate of increase in trend total motor vehicle registrations has been falling since March 1994 and has flattened over the three months to August. The level remains 11.5 per cent above the most recent low in August 1993.

The trend in August for passenger vehicles continued the increases since September 1993, but the rate of increase has been slowing over recent months. The fall in the trend for other vehicle registrations was the first since October 1993.

## NEW MOTOR VEHICLE REGISTRATIONS



The 15.1 per cent fall in other vehicle registrations in seasonally adjusted terms follows a 12.1 per cent fall the previous month. Total new vehicle registrations (seasonally adjusted) fell in all States and Territories except New South Wales and Tasmania which rose 2.8 and 11.8 per cent, respectively. The largest falls occurred in Queensland, the Northern Territory and South Australia where falls of 26.0, 23.7 and 12.2 per cent were recorded.

Total original registrations rose by 1.9 per cent with rises in all States and Territories except Queensland, the Northern Territory and South Australia where falls of 22.4, 14.0 and 0.3 per cent were recorded. New South Wales registrations were up by 13.0 per cent and the Australian Capital Territory rose by 18.5 per cent.

The top five models registered for August 1994 were Holden Commodore/Calais (with 7,733 vehicles); Ford Falcon/Fairmont (with 5,058 vehicles); Mitsubishi Magna (with 3,081 vehicles); Toyota Camry (with 2,378 vehicles); and Toyota Corolla (with 1,906 vehicles).

For further information, order the publication *New Motor Vehicle Registrations, Australia (9301.0)*, or contact Kevin Yeaton on (06) 252 6255.

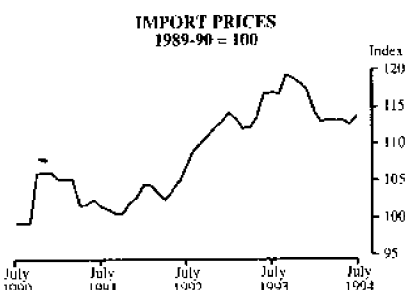
## Weaker dollar contributes to rise in import prices

The import price index rose by 1.0 per cent in July 1994.

A fall in the value of the Australian dollar against the Japanese Yen and the major European trading currencies contributed to price increases in a range of items in July.

The most significant price increases were for machinery and transport equipment, mostly due to the exchange rate effect on road vehicle prices, and increased world oil prices.

Between July 1993 and July 1994 the index fell by 2.7 per cent.

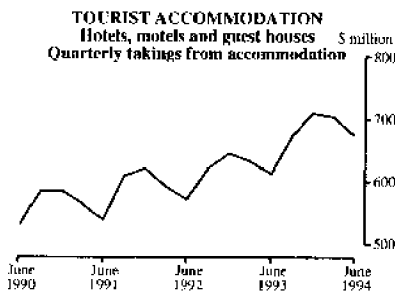
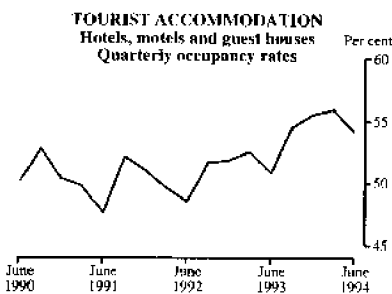
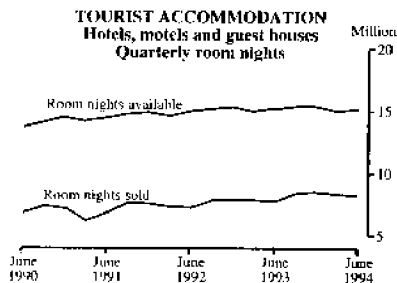


## IMPORT PRICES, JULY 1994

## Percentage change

Selected items	Percentage change	
	From previous month	From corresponding month of previous year
Food and live animals	0.5	-1.0
Machinery and transport equipment	1.1	-1.5
Mineral fuels, etc.	3.0	-2.4
Manufactured goods, by material	0.3	-2.9
Crude materials	1.4	-3.6
Miscellaneous manufactured articles	0.6	-4.4
Chemical products	1.2	-5.3
Animal and vegetable oils, etc.	0.6	-6.2
Commodities and transactions	-0.3	-9.5
Beverages and tobacco	-1.2	-13.2
<i>All groups</i>	1.0	-2.7

## Improvement in hotel/motel occupancy rates sustained



Average room occupancy for hotels and motels in Australia increased to 54.1 per cent in the June quarter 1994 compared with 50.8 per cent recorded in the June quarter 1993 and 48.5 per cent for the June quarter 1992. The June quarter 1994 result was the highest room occupancy rate achieved for a June quarter since the 55.3 per cent in the 1988

Australian bicentennial year. This continued a trend where room occupancy rates in the three quarters preceding the June quarter 1994 have also been the highest corresponding quarter results since 1988.

Demand for accommodation in hotels and motels in the June quarter 1994 increased by 6.4 per cent to 8.2 million room nights occupied compared with 7.7 million in the corresponding quarter of the previous year. The increase in demand coincided with a slight decrease over the period in rooms available.

Room occupancy rate increases were recorded for all States and Territories in rank order as follows: Tasmania (up 6.1 percentage points), Western Australia (up 4.3 points), Australian Capital Territory (4.0), New South Wales (3.3), Victoria (3.2), Queensland and Northern Territory (3.1) and South Australia (up 1.2 percentage points).

Guest arrivals at hotels and motels increased by 6.1 per cent nationally, while average length of stay remained at 2.0 days overall and ranged from 2.4 days for Western Australia and 2.3 days for Queensland to 2.1 days for the Northern Territory and Australian Capital Territory, 1.9 days for South Australia and 1.8 days for New South Wales, Victoria and Tasmania.

Takings from accommodation increased by 10.2 per cent to \$675 million, while average takings per room night occupied increased from \$79 to \$82.

Employment (full-time and part-time) at hotel and motel accommodation establishments was 101,655 persons in the June quarter 1994, an increase of 3.2 per cent over the corresponding quarter of the previous year.

The number of holiday flats, units and houses available Australia wide for short-term letting increased by 4.6 per cent while unit nights occupied increased by 6.3 per cent. As a result, the unit occupancy rate rose from 44.3 per cent to 45.1 per cent. Accommodation takings increased by 12.3 per cent to \$85 million.

For caravan parks, capacity available increased by 0.3 per cent and takings from accommodation increased by 4.0 per cent to \$101 million. The site occupancy rate rose from 42.1 per cent to 43.1 per cent. Of total capacity available, 16.7 per cent was occupied by long-term residents, 15.3 per cent was permanently reserved but only casually occupied by its tenants and an average of 11.0 per cent was occupied by other short-term guests.

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For visitor hostels (backpacker establishments), a 1.5 per cent increase was recorded in bed spaces available while the bed occupancy rate increased from 39.3 per cent to 40.6 per cent. Takings from accommodation increased by 5.3 per cent to \$11 million at an average of \$12 per guest night.

#### TOURIST ACCOMMODATION Hotels, motels and guest houses with facilities

	June quarter		Percentage change
	1993	1994	
Rooms available ('000)	167.0	166.7	-0.2
Room nights occupied ('000)	7 706.6	8 196.9	6.4
Room occupancy rate (%)	50.8	54.1	6.5
Guest nights ('000)	13 377.2	14 209.4	6.2
Guest arrivals ('000)	6 636.3	7 042.7	6.1
Average length of stay (days)	2.0	2.0	0.0
Takings from accommodation (\$m)	611.9	674.5	10.2
Employment (no. persons)	98 500	101 700	3.2

For further information, order the publication *Tourist Accommodation, Australia* (8635.0), or contact John Alexander on (07) 222 6215.

## Order from the following:

### Expected releases over fortnight to 11 October

#### September

- 29** Balance of Payments, Australia, August 1994 (5301.0; \$16.50)
- Building Approvals, Australia, August 1994 (8731.0; \$13.50)

#### October

- 6** Job Vacancies and Overtime, Australia, August 1994 (6354.0; \$13.00)
- 11** Retail Trade, Australia, August 1994 (8501.0; \$11.00)

### Selected releases: 21 to 27 September

#### General

- Directory of Labour Market and Social Survey Data, 1994 (1135.0; \$10.00)
- Monthly Summary of Statistics, Aust., September 1994 (1304.0; \$20.50)
- Index of Localities, NSW, 1993 (1101.1; \$40.00)
- Australian Capital Territory in Focus, 1994 (1307.8; \$25.00)

#### Demography

- Regional Population Growth, Aust., 1993 (3218.0; \$17.50)
- Overseas Arrivals and Departures, Aust., June Qtr 1994 (3402.0; \$14.50)

#### National accounts, Finance and Foreign trade

- Managed Funds, Aust., June Qtr 1994 (5655.0; \$25.00)
- Assets of Superannuation Funds and Approved Deposit Funds, June Qtr 1994 (5656.0; \$11.00)

#### Agriculture

- Livestock Products — Meat, Qld, July 1994 (7204.3; \$5.00)
- Agriculture Statistics — Selected Small Area Data, WA, 1992-93 (7120.5; \$16.50)

#### Manufacturing, Mining, Energy, Service industries, Building and construction

- Manufacturing Production, Aust.: Energy Products, May Qtr to July Qtr 1994 (8368.0; \$7.00)
- Actual and Expected Private Mineral Exploration, Aust., June Qtr 1994 (8412.0; \$10.50)

Key national indicators	Period	Units	Latest figure available		Percentage change (a) on	
			Original	Seasonally adjusted	Previous period	Corresponding period last year
<b>National accounts</b>						
Gross domestic product (GDP(A)) at 1989-90 prices	June qtr 94	\$m	99 058	100 666	0.9	4.3
<b>International accounts</b>						
Balance on current account (b) (d)	July 94	\$m	-1 926	-1 841	-21	-62
Balance on merchandise trade (b) (d)	"	"	-470	-476	—	—
Balance on goods and services (b) (d)	"	"	-724	-565	—	—
Merchandise exports (d)	"	"	5 388	5 217	-3	-2
Merchandise imports (d)	"	"	-5 858	-5 693	3	9
Net foreign debt	June qtr 94	\$m	161 524	n.a.	-1.9	-4.3
Net foreign liabilities	"	"	232 698	n.a.	-0.2	5.2
<b>Consumption and investment</b>						
Retail turnover at current prices	July 94	\$m	8 556.9	8 874.2	3.0	8.6
New capital expenditure at current prices	June qtr 94	"	7 284	6 994	7	11.0
New motor vehicle registrations	August 94	no.	52 930	48 795	-6.2	-4.6
<b>Production</b>						
Manufacturers' sales at 1989-90 prices	March qtr 94	\$m	35 184	37 572	2.3	9.9
Dwelling unit approvals (d)	July 94	no.	15 312	15 338	-5.1	1.5
Building approvals (d)	"	\$m	2 151.8	2 298.7	-17.2	9.2
Building work done at 1989-90 prices	March qtr 94	"	5 783	6 236	2.4	—
<b>Prices</b>						
Consumer price index	June qtr 94	1989-90 = 100.0	111.2	n.a.	0.7	1.7
Articles produced by manufacturing industry	July 94	1988-89 = 100.0	116.2	n.a.	0.1	0.6
Materials used in manufacturing industries	July 94	1984-85 = 100.0	125.1	n.a.	0.9	-1.7
<b>Labour force and demography</b>						
Employed persons	August 94	'000	7 885.7	7 934.2	0.5	3.5
Participation rate †	"	%	62.2	62.8	-0.4	0.3
Unemployment rate †	"	"	9.2	9.5	0.0	-1.6
Job vacancies	May qtr 94	'000	49.4	53.0	18.5	64.1
Average weekly overtime per employee	"	hours	1.31	1.33	7.5	11.1
Estimated resident population	March 94	million	17.8	n.a.	0.3	1.0
Short-term overseas visitor arrivals	April 94	'000	255	271	-10.6	12.1
<b>Incomes</b>						
Company profits before income tax	June qtr 94	\$m	5 410	6 115	-2.5	33.9
Av. weekly earnings, full-time adults; ordinary time	May 94	\$	617.50	618.20	1.4	3.3
<b>Financial markets</b>						
Interest rates (c) (monthly average)						
90-day bank bills †	August 94	% per annum	5.70	n.a.	0.3	0.95
10-year Treasury bonds †	August 94	"	9.35	n.a.	-0.2	2.45
Exchange rate -- \$US (c) (d)	July 94	per \$A	0.7349	n.a.	0.2	8

(a) Based on seasonally adjusted figures where available. (b) 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. (c) Source: Reserve Bank of Australia. (d) Later figures expected to be released Thursday, 29 September 1994.  
 NOTES: † = change is shown in terms of percentage points. n.a. = not available.

Key State indicators	Period	Percentage change from same period previous year								
		NSW	Vic.	Qld	SA	WA	Tas.	NT	ACT	Aust.
New capital expenditure*	March qtr 94	-4.3	8.6	30.1	-14.6	-16.2	-41.0	n.a.	n.a.	0.2
Retail turnover (trend estimate)	July 94	6.9	5.9	6.9	4.4	6.4	5.4	n.a.	3.3	6.8
New motor vehicle registrations†	August 94	1.9	1.8	-18.2	-7.8	-9.2	-1.2	3.0	-20.5	-4.6
Number of dwelling unit approvals*	July 94	0.3	7.7	-1.2	-14.7	6.2	-5.4	-51.7	-24.6	1.5
Value of total building work done	March qtr 94	-8.2	5.6	4.6	0.7	20.6	4.6	20.3	-4.7	1.4
Employed persons*	August 94	3.5	2.5	5.9	1.9	4.2	1.0	2.2	2.0	3.5
Capital city consumer price index	June qtr 94	1.5	1.7	1.6	1.9	2.2	2.7	2.2	1.5	1.7
Av. weekly earnings (full-time adult ordinary time)	May 94	3.9	3.6	2.6	1.8	3.0	3.2	1.2	2.6	3.5
Population	March qtr 93	0.8	0.2	2.6	0.5	1.4	0.2	0.9	0.6	1.0
Room nights in licensed hotels and motels, etc.	June qtr 94	5.7	6.1	6.1	2.3	9.8	14.7	8.0	6.5	6.4

\* Seasonally adjusted except for NT and ACT. † Seasonally adjusted.  
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