

MANUFACTURING

MANUFACTURING INDUSTRY IN VICTORIA, 1968-69 TO 1973-74

Between 1968-69 and 1973-74 Victoria's manufacturing industries followed generally the growth of the national economy, and the expansionary trends of the 1960s continued. By the advent of the 1970s, however, circumstances began to be evident which induced some fluctuations in ensuing years. The early 1970s saw a high level of economic activity, full employment and buoyant consumer demand where most companies operated in a climate of relatively mild cyclical movements. But, by the end of 1973-74, due to a combination of internal and external factors, some sectors which had enjoyed a situation of strength and sound growth found themselves facing a period of crisis. Internal difficulties included steeply rising costs and shortages of skilled labour and materials. The influence of competition from overseas manufacturers as a result of currency movements and tariff reductions was another contributing factor.

Over the period, value added in Victorian manufacturing industry increased steadily, growing from \$2,541m in 1968-69 to \$4,546m in 1973-74, thus maintaining a contribution of nearly 35 per cent to the national figure. In addition, turnover of Victorian companies expanded from \$6,336m to \$10,670m in the six years to 1973-74.

Total manufacturing employment rose consistently over the years to 1973-74. In June 1969 an average of 431,651 persons were employed in Victorian manufacturing establishments and by June 1974 this had risen to 469,838 persons, a rise of nearly 9 per cent. Industries which experienced significant growth in total employment over the period included paper products, industrial machinery and equipment, plastics, food, beverages and tobacco, motor vehicles, and electrical appliances.

There was little change in the composition of the workforce, with male employees generally accounting for some 70 per cent of the total of those employed in manufacturing establishments. However, by early 1974 this figure had declined to some 68 per cent; this was mainly due to the rapid expansion of female employment in the textile, clothing, and footwear industries which occurred in the early 1970s and continued until mid-1974.

The continued expansion of Victorian industry through this period saw a growing demand for a wide range of skills. Much of the extra demand for labour was met by immigration, with both Commonwealth and Victorian Government assistance schemes and private enterprise recruitment programmes being implemented. While the infusion of skills from overseas was an important factor in Victoria's industrial development there still existed widespread shortages of skilled workers which inhibited output at times of peak demand and added to cost pressures through payment of over-award wage rates and overtime. Industries

which were susceptible to frequent labour shortages included the building materials, metal fabrication, and engineering sectors.

One of the important factors allowing a continued growth in industrial development in Victoria has been the accessibility and availability of energy resources. In 1969 a major stimulus resulted from the full flow of natural gas from the Bass Strait fields. Prompt development of the fields made natural gas available for industrial usage within a few years after discovery and sale of gas to industrial users rose steeply from 17,100,000 therms in 1968 to 351,757,400 therms in 1974. Principal users included the paper, aluminium, metal fabrication, and food processing industries. Electricity generating facilities located on the vast brown coal deposits in the La Trobe valley, east of Melbourne, have been progressively enlarged to cope with demand from domestic and industrial users. In 1971 the well established base load generating stations at Yallourn and Morwell were augmented by the addition of a new 1600 megawatt installation at nearby Hazelwood. Sales of electricity to industrial users increased from 3222 Gwh in the 1968-69 year to 4290 Gwh in 1973-74.

While there was not the spectacular growth which occurred in Victoria's industry compared with the 1950s and 1960s, there was still considerable expansion and broadening of productive capacity undertaken and new technology introduced. Fixed capital expenditure in all industries by Victorian companies rose annually from \$277.7m in 1968-69 to \$438.4m in 1972-73. In 1973-74 expenditure declined to \$418.1m, reflecting uncertainties in some industries about the future economic climate. Much of the expansion and development which occurred in the early 1970s was the result of either the establishment of new industries in decentralised locations, or metropolitan based companies expanding by forming branch production facilities in country areas.

For many years the Victorian Government has followed a conscious policy of encouraging growth of industry in country centres. However, it was not until 1971-72 that a noticeable increase in non-metropolitan manufacturing employment was achieved. In September 1972 a Ten Point Plan was introduced by the Victorian Government to encourage companies to locate their activities in country areas. These measures proved highly successful and attracted many companies either to establish or relocate manufacturing operations in country areas. Areas including Geelong (with an already broad base encompassing motor vehicles, metals, and textiles) expanded. Ballarat, Bendigo, and smaller centres received further stimulus. Major industry groups to relocate their activities were the textiles and metal fabrication industries. The predominance of the textiles, clothing, and footwear industries was perhaps unfortunate as these were the industries which came under most pressure from import competition in 1973-74. Escalating costs, particularly with the phasing in of equal pay for female employees was another problem this sector had to face.

By mid-1974 the trend towards expansion in the textiles, clothing and footwear industries was reversing and some companies were either forced to cease operations or significantly to contract activities; many of the recently opened or expanded country branches were forced to close. Except for some specialised areas of production, by the end of 1974 unemployment in these industries reached a high level.

The late 1960s and early 1970s was a period of rising demand for motor vehicles. In addition to expansion of manufacturing facilities which included new engine and chassis plants and plastics manufacture, new technology was introduced with the production of V8 engines. Developments also occurred in industries supplying vehicle manufacturers and included a new tyre plant with a capacity to manufacture the largest tyres to be made in Australia. In 1972 two Japanese companies which had achieved increasing penetration of the Australian market with their smaller, economical four-cylinder vehicles, applied to enter local manufacturing plants through expansion of existing assembly operations and

establishment of new production facilities in Victoria. However, the change of government in December 1972 and a subsequent decision to review motor vehicle policy delayed the applications proceeding.

One of the largest single developments of the period was the commencement of work on a new sheet steel mill complex at Western Port, some 70 kilometres south-east of Melbourne. This project which will form the nucleus of a future industrial complex in the area, marked the first significant basic steel processing to be undertaken in Victoria. The paper industry was another to widen both its technological and manufacturing expertise. Apart from a continuing expansion of capacity, plans were announced in 1973 for a \$100m development for the La Trobe valley which included a new paper machine together with a chemical recovery plant and pulp mill. Further technological developments occurred in glass manufacture with the commissioning of a float glass manufacturing plant. This method of glass production gives significant advantages in product quality over previously used methods of producing sheet glass. The continuing growth of the building industry added stimulus to other industries supplying this sector; during the early 1970s expansion of aluminium smelting facilities was undertaken; new factories were built to produce fibreglass products and particle board. In 1973 production of the Australian designed "Nomad" short take-off and landing aircraft commenced at the Government Aircraft Factory in Melbourne. This unique aircraft attracted wide interest both within Australia and in many overseas countries. Also in 1973 construction began on a new plant at Wodonga to manufacture colour television receivers. Over the six-year period there was a general expansion of capacity throughout industry and many developments of a multi-million dollar nature in the chemicals, foodstuffs, and engineering industries, many involving new plants.

Finance for development of industry generally was adequate. The development of more sophisticated money markets and financial institutions in the 1970s, and the range of Commonwealth and State financial and developmental institutions enabled the demand from industry for increasing investment funds to be met. A disturbing feature, nevertheless, was periods of tight control by monetary authorities, particularly late in 1970, thus increasing the price of finance and adding to liquidity problems. Companies were faced with a rising trend in interest rates beginning in 1970-71 and continuing through to 1974. Other cost elements similarly increased steadily in the period. 1970-71 saw the beginning of a prolonged series of wage increases through the early 1970s, and this factor, coupled with increasing import prices was reflected in greater costs.

Under these circumstances and by the end of the period under review, many companies found it difficult to achieve satisfactory levels of profitability.

As a step in countering the effects of inflation apparent in 1972-73 the Commonwealth Government introduced legislation creating the Prices Justification Tribunal, under which companies or relevant groups of companies with a turnover of \$20m or more are required to notify the Tribunal of proposed price increases. The Tribunal, which commenced operations in August 1973, determines whether or not those or lesser prices are justified.

Although local capital continued to provide the main contribution to industrial development, the importance of a continuing inflow of overseas capital cannot be overlooked. Because of the desire to develop rapidly Australia's resources and manufacturing base, successive Commonwealth Governments adopted a policy of encouraging overseas capital investment in Australia. In addition to this encouragement Victorian governments have also actively promoted the State of Victoria as an attractive investment base. These policies have resulted in local capital resources being augmented by a consistent flow of overseas capital necessary to maintain Victoria's industrial development. In addition to direct capital investment in manufacturing capacity which came mainly from the U.S.A., Europe and, to a lesser extent Japan, management and technological skills were

widened. With the assistance of overseas funds, the early 1970s saw the development of manufacturing plants producing telecommunications equipment, television receivers, automotive accessories, petrochemical products, aluminium, and foodstuffs. The development of the Bass Strait natural gas and oil fields was undertaken by a partnership of local and overseas capital.

With the growing concern over pollution and protection of the environment, the Victorian Government in 1973 introduced legislation creating the Environment Protection Authority. Under the terms of this legislation manufacturers discharging wastes into the air, into water, or on to land are subject to various licensing procedures by the Authority.

After the growth of the preceding years, the late 1960s and early 1970s was a period of less marked expansion by Victorian manufacturers. Most sectors achieved growth during the early part of the six-year period and there were few examples of overall decline. However, towards the end of the period there was evidence that some industries would face difficult circumstances in the years ahead. These situations were in industries where the problems were more fundamental than the mild cyclical fluctuations in the economic climate which periodically occurred and which most companies were able to counter. The most critical decline was faced by the textile, clothing, and footwear industries where as mentioned earlier, by mid-1974, rationalisation of capacity was in progress, accompanied by rising unemployment. The automotive industry was facing a similar problem where it was feeling the real effects of changing consumer patterns towards more economical vehicles, and was also awaiting announcement of long term plans for the industry. Apart from these identifiable trends in the pattern of industry the overall trend during the period was one of growth. The developments undertaken during these years consolidated an already widely diversified base and contributed further to a firm industrial structure in Victoria.

NATURAL RESOURCES AND LOCATION

Natural resources

Victoria's natural resources—a temperate climate, adequate rainfall and water supply, and productive soils—have been used to provide both raw materials and power for industry. For example, clay deposits for brick, tile, and pottery making are worked near Melbourne, Ballarat, Bendigo, Colac, Shepparton, Wangaratta, and in other areas of Victoria. Sand, used in foundries, and concrete and glass works, is obtained in the Port Phillip and west Gippsland districts. Stone and gravel are quarried in many parts of Victoria, but, since large loads are expensive to transport, sites are concentrated within 80 kilometres of the principal market, metropolitan Melbourne. Inside a similar radius, the availability of limestone has attracted the establishment of cement works at Geelong and Traralgon, while the Lilydale deposits are extracted to produce agricultural lime.

Although Victoria's historic gold rush has long since passed, gold is still mined in the Castlemaine, Gaffneys Creek, and Harrietville areas. Victoria's other mineral resources include salt collected from solar evaporation on the western shores of Port Phillip and from the Wimmera and Mallee lakes; gypsum is also found in the north-western Mallee. More detailed information on mining activity can be found on pages 365–71.

Victorian forests provide approximately one quarter of Australia's timber output. The fine vegetation of the Central Highlands forms the basis of important felling activities. The industry is also significant in Gippsland, where paper is manufactured at Maryvale. Other paper mills are situated in Melbourne, which is a major market for all wood and timber products.

Water, needed in large quantities for industry, is available throughout much of Victoria from dams in the catchment areas of the chief rivers (see map on

page 478 of the *Victorian Year Book* 1966). In most years Melbourne is well supplied from the storages to its north and north-east in the Plenty, Upper Yarra, Maroondah, and O'Shannassy watersheds. However, severe restrictions were imposed during the 1967-68 and 1972-73 summers because of widespread drought conditions. To meet future demands, construction works are being extended. (See pages 205-7.)

Power supplies and the fuels from which they are derived are basic for industrial development. Victoria's range of carboniferous fuels is not great and, in the past, it was necessary to import significant amounts of black coal from New South Wales. Subsequently, the State Electricity Commission developed the brown coal resources of the La Trobe valley. The open-cut mines of the Yallourn-Morwell region presently produce about 27.5 million tonnes per year for use in the steam-generation of electricity and briquette making. With the high voltage grid network mapped on page 355, the Commission now delivers the bulk of Victoria's public electricity requirements; the balance is purchased interstate.

The discovery in February 1965 and subsequent development of sizeable offshore reserves of oil and natural gas in the Gippsland basin have augmented Victoria's power and chemical resources. In March 1969 natural gas for commercial use flowed from the Barracouta field and, a month later, the first domestic customers were connected. The Marlin field began to operate in January 1970. Natural gas is now piped from Longford to Melbourne and then to Geelong, Ballarat, and Bendigo. Oil in commercial quantities has been produced from the Barracouta field since October 1969, from Halibut since March 1970, and from Kingfish since April 1971. Petroleum refining is carried out at Altona, Geelong, and Crib Point, and petrochemical manufacturing at Altona, Geelong, Dandenong, and Footscray.

Location

Victoria's earliest industries were located in Melbourne, the entry port for most of the people and their supplies. As Victoria developed, Melbourne became its most populous centre, major port, the hub of the railway and road network, and major manufacturing centre. At 30 June 1975, 82.9 per cent of Victoria's 8,924 manufacturing establishments owned by multi-establishment enterprises and all single establishment manufacturing enterprises employing four or more persons, (see page 488 for further details), and 84.3 per cent of its work force engaged in manufacturing were located in the Melbourne Statistical Division. There are basic reasons for this: Melbourne's function as port and transport focus makes the collection of raw materials and the distribution of manufactured goods relatively easy; the concentration of Victoria's population in the city means a concentration of potential purchasers and potential workers; and by locating their operations in Melbourne, manufacturers can enjoy easy interchange of materials, parts, and services with other manufacturers.

Melbourne's early industrial suburbs grew on the fringes of the city centre in Port Melbourne, South Melbourne, Richmond, Collingwood, Spotswood, Fitzroy, and Footscray. In these suburbs a wide range of manufacturing industry is to be found. The more recent new industrial municipalities are Altona, Broadmeadows, Moorabbin, Oakleigh, and Dandenong, where extensive areas are available for the establishment of new industries.

Apart from smelting and large-scale steel making, most types of secondary industry are to be found in Melbourne. In terms of employment, engineering and metal processing constitute Melbourne's major industries, but a high proportion of Victoria's chemical, textile, paper, furniture, food, and building materials industries are also concentrated there.

Outside the metropolitan area, Geelong is the most important industrial centre, with port facilities, close proximity to the Melbourne market, and rich surround-

ing rural areas. Industries established in the area include petroleum refining, and the manufacture of agricultural machinery, motor vehicles, aluminium ingots and extruded products, textiles, chemical fertilisers, glass, clothing, carpets, food-stuffs, cement, fertilisers, and sporting ammunition.

The other country urban areas in which more than 1,000 persons are employed in manufacturing establishments (ranked in order of the number of persons employed in factories) are the Ballarat urban area, Bendigo urban area, La Trobe valley, Wangaratta City, Shepparton City, Wodonga Rural City, Warrnambool City, Maryborough City, and Castlemaine City. The factory population in country areas is engaged in the production of food and textiles from locally produced raw materials, in clothing, and in engineering plants, some of which had their origin in the gold mining era of the nineteenth century, and more recently in decentralised plants with defence significance. In addition, approximately 4,200 persons are engaged by the State Electricity Commission in power generation and ancillary activities. These are not taken into account in the foregoing ranking.

MANUFACTURING ACTIVITY

Sources of information

At the Australian level of aggregation, information on the subjects dealt with in this section of the *Year Book* is contained in the annual *Manufacturing Establishments* and *Manufacturing Commodities—Principal Articles Produced* issued by the Central Office of the Bureau. At the Victorian level of aggregation, the annual publications issued by the Deputy Commonwealth Statistician, Melbourne, are *Manufacturing Establishments: Summary of Operations by Industry Class*, *Manufacturing Establishments: Details of Operations by Industry Class*, *Manufacturing Establishments: Small Area Statistics*, *Manufacturing Establishments: Usage of Electricity and Fuels*, and *Manufacturing Establishments: Selected Items of Data Classified by Industry and Employment Size* (available for 1968–69 and 1974–75). Current information on factory products is available in the *Victorian monthly statistical review* and the monthly Victorian publication *Secondary production*.

In addition to the above mentioned publications there is also a series of fifty-two *Monthly Production Summaries*, each relating to the production of a particular commodity or group of commodities for Australia.

In respect of the year 1968–69, the Australian Bureau of Statistics conducted the annual census of manufacturing industry as part of a programme of fully integrated economic censuses covering manufacturing, mining, retail, wholesale, and electricity and gas establishments. For a detailed description of the purposes served by this project, and of the new concepts and methods adopted, the reader is referred to the special article on these censuses on pages 368–89 of the *Victorian Year Book 1971*.

The integrated economic censuses have been a major undertaking involving the development of new concepts, definitions, and procedures, and, inevitably, there were considerable delays in finalising the results of the 1968–69 and 1969–70 censuses, so much so in fact that the 1970–71 census of manufacturing establishments was abandoned. However, the later censuses of manufacturing establishments were completed close to time tables realised in respect of 1967–68 and previous years, and, as far as possible, 1974–75 data appears in this chapter. (See also pages 487–8.)

Manufacturing developments during 1975

During 1975 Victorian manufacturing industry achieved some growth in the chemicals, building materials, and heavy engineering sectors, but production of food, textiles and apparel, and light engineering declined. In the early part of the year, import competition was a significant factor in retarding development in

these areas, but government import restraint measures later became effective in assisting production in clothing and textiles and to a lesser extent, motor vehicles.

A gas plant at Longford (near Sale) was commissioned early in 1976 and a third process train of the fractionation plant at Long Island Point, Western Port, became operational. Construction of a styrene monomer plant commenced at Footscray and has been planned to be operating in 1977. At Broadmeadows a plant was commissioned to make industrial chemicals for the textile and paper industries, and at Bendigo, a new factory manufacturing rubber products began production, with an initial investment of \$1m in plant and buildings.

The pattern of developments in the light engineering area remained unchanged from that of 1974, with little significant development. A leading motor vehicle assembler expanded its capacity at Port Melbourne with capital expenditure totalling more than \$2m.

In building materials manufacture, the first stage of a timber mill rationalisation in the Portland area was completed at a cost of \$350,000 with final costs of this development expected to be \$1m. Capacity of a particle board mill at Ballarat was more than doubled by the addition of a second board making machine and factory extension at a cost of \$1m. Also in the area of building materials, a reinforced concrete pipe factory involving an investment of \$500,000 was opened at Clyde.

In the food and allied products area a manufacturer of canned pet food, soap and tallow, presently situated at Braybrook, commenced a new plant at Shepparton at an estimated cost of \$2.3m. The plant is expected to employ 100 people rising to 250 over the next four years, and to cover an area of 4,500 square metres.

At Western Port the second stage in developing sheet steel manufacturing facilities began, involving the construction of a hot strip mill scheduled for commission by late 1977, at an anticipated cost of over \$150m.

A Thomastown foundry, relocated in Bendigo, established a \$1m plant employing 120 persons and at the Yallourn/Morwell brown coal deposits, the State Electricity Commission of Victoria commissioned new conveyor systems worth approximately \$3m.

Following a severe downturn in the level of production of both the textile and apparel industries in the second half of 1974, the Commonwealth Government took action to reduce the flow of imports in 1975 to levels akin to those obtaining in 1972-73.

Further reference, 1976

Government activities

Industrial legislation

The *Labour and Industry Act* 1958 represents the development and consolidation of industrial legislation which had its beginnings in 1873. Among other matters, the Act deals with the registration and inspection of factories, guarding of machinery, and conditions of employment. The Act also provides for the appointment of Wages Boards and the Industrial Appeals Court. Further information on these matters may be found on pages 276-309. The Act debars employment in factories of children under the age of fifteen years, and the Victorian Education Act makes daily attendance at school compulsory between the ages of six and fifteen years. Some children under fifteen may work in a shop or office if they are exempted under the Education Act. Similarly under the Labour and Industry Act permission may be granted to a child to work in a factory when the child has attained the age of fourteen years and is not required to attend school under the Education Act. Recent legislative changes enable school pupils to obtain work experience as part of their education.

This applies for a maximum of 12 days per school term and pupils participating must be in the second year of secondary school or over the age of thirteen years. The system in relation to work experience is under the strict control of school principals. Apart from these exceptions, the general effect of the two statutes is to restrict the incidence of child labour in Victoria to a very low level.

Division of Industrial Development of the Department of State Development and Decentralization

The Victorian Government desires the balanced development of Victoria. The instrument through which it attempts this is the Department of State Development and Decentralization whose activities cover two main areas: commercial and industrial development and tourism. All matters pertaining to tourism are handled through the Ministry of Tourism which is charged with developing and co-ordinating the tourist industry in Victoria by improving tourist facilities throughout the State, and operating tourist bureaux interstate and overseas.

The Division of Industrial Development has a similar role in that it is responsible for promoting and co-ordinating the development of primary, secondary, and tertiary industries throughout the State. At the same time it is also responsible for implementing the Victorian Government's decentralisation programme.

In September 1972, the Victorian Government introduced a new strategy to encourage further development in non-metropolitan areas. It was entitled the 10 Point Plan for Decentralization and its basic elements are as follows:

- (1) Regionalisation of government administration;
- (2) further decentralisation of Victorian Government administration to comply with the regionalisation concept;
- (3) provision of direct financial incentives to country industries;
- (4) representing to the Commonwealth Government the problems of communication costs for country industries;
- (5) co-operating with adjoining States and the Commonwealth Government in the development of new cities; and
- (6) development of essential services in major country centres.

The Division of Industrial Development was given the task of implementing the new policy and its staff was restructured and supplemented accordingly.

To achieve its aims the Division maintains liaison with a wide range of government, semi-government, and other organisations which are involved in various aspects of State development. Close contact is also maintained with the Victorian Government's overseas representatives in London, Munich, New York, Paris, and Tokyo. Through these offices Victoria is promoted as an attractive State to visit and invest in, and assistance is given to manufacturers considering setting up an Australian operation or seeking joint venture arrangements, or to companies to take up licensing agreements.

The primary objectives of the Victorian Government's decentralisation programme are:

- (1) The preparation of a climate for development. This involves the development, improvement, and maintenance of essential services such as water supply, sewerage, transport facilities, community services and facilities, etc.;
- (2) offsetting any disadvantages suffered by existing development in non-metropolitan areas; and
- (3) the introduction of new development to non-metropolitan areas.

While having specific responsibilities in encouraging and assisting development in non-metropolitan areas, the Division also has responsibilities within the Melbourne metropolitan area as follows:

- (1) To assist in the establishment of new business undertakings that desire to locate within Victoria, but are unable to operate satisfactorily outside the metropolitan area;

(2) to provide advice to business, government, government departments and instrumentalities, and other authorities and organisations on the climate for the expansion and establishment of business undertakings operating outside the metropolitan area ;

(3) to maintain close contact with the Melbourne-based components (e.g., head office, distribution, sales, etc.) of businesses operating in non-metropolitan areas ;

(4) to canvass businesses within the metropolitan area on the possibility of relocating to non-metropolitan centres ; and

(5) to represent businesses and their associated organisations throughout the State in discussions with the Commonwealth Government regarding the possible variation of existing policies and programmes and the formulation of new ones.

The Division is under the control of a director, deputy director, and two assistant directors. Under one assistant director, the Industries Branch concentrates on maintaining contact with industry groups, helping firms moving to the country and generally promoting country areas. Industrial consultants interview and advise industrialists on establishing industry in Victoria and investigate matters affecting established and projected industries. They also provide advice on pertinent Commonwealth and State policies affecting industrial development. Their activities are supported by promotion officers, who are charged with servicing the needs of established industries and assisting Development Committees in the promotion of their areas. They also conduct prospective industrialists around their respective areas.

Industrial consultants and promotion officers have been assigned to each of the five districts of country Victoria, and the Port Phillip District, centred on Melbourne. Six promotion officers, each with a specialised knowledge of his own area, are resident in Ballarat, Bendigo, the La Trobe valley, Portland, Wodonga, and Geelong.

Under the other assistant director, the Development Branch provides consultant expertise to handle aspects of industry planning and State development. It researches and formulates new decentralisation strategies and undertakes broad studies at State, regional, and local levels of economic, social and physical factors. It also examines industrial and employment potentials in country areas and handles inquiries from overseas manufacturers.

The Development Branch administers Industrial Estate development programmes on its own behalf and also in co-operation with private developers and country municipalities. The Branch also administers decentralisation incentives, appraises the economic viability of companies seeking to decentralise, and co-operates closely with municipalities offering incentives to industries to develop and decentralise.

A wide range of incentives to encourage development to take place in non-metropolitan areas is offered. Consistent with the previously stated objectives of the decentralisation programme these incentives recognise the disadvantages of non-metropolitan locations.

The programme in large part relies upon secondary industry as a development catalyst in that it has been more labour than capital intensive. However, recent trends indicate that tertiary industry is overhauling secondary industry as an employment generator and so deserves greater attention in the programme.

The industries qualifying for assistance under the programme are manufacturing or processing industries located outside an 80 kilometres radius of Melbourne or within 8 kilometres of the Post Offices at Bacchus Marsh, Broadford, Gisborne, Kyneton, and Woodend. They are eligible for all Victorian Government incentives after being declared an Approved Decentralized Secondary Industry (A.D.S.I.). Similarly, manufacturing or processing industries outside the metropolitan area, but within 80 kilometres of it, and located within 8 kilometres of the

Post Offices at Ballan, Geelong, Lancefield, Queenscliff, Trentham, and Yea are eligible for assistance. Industries qualifying for assistance are given the alternative title of Declared Special Establishment (D.S.E.). The third category of approval relates to sawmilling activities throughout the State and these are eligible to become Approved Decentralized Establishments (A.D.E.).

The Division supplies details of the various incentives which are available to prospective bodies wishing to locate their activities away from Melbourne.

Commonwealth Department of Overseas Trade

The Department is responsible for developing and maintaining Australia's position as a major world trading nation through international trade and commodity commitments and agreements, development of export markets, and formulation of policy proposals for the Commonwealth Government on Australia's international trade policy and trade objectives.

Commonwealth Department of Industry and Commerce

The Department mainly deals with the efficiency and development of manufacturing and tertiary industries (including the tourist industry) and research relating thereto, as well as adjustment assistance to industry, assistance to small business, manufacturing of goods and in the provision of services, including munitions and aircraft, for defence and shipbuilding.

Temporary Assistance Authority

The *Industries Assistance Commission Act 1973* provides for the creation of a Temporary Assistance Authority comprising not more than three persons. This authority replaces the previous Special Advisory Authority. The function of the Temporary Assistance Authority is to inquire into and report on the need for urgent action to protect particular industries against import competition. This action can take the form of temporary duties or restrictions on imports. The Temporary Assistance Authority is required to report to the Minister within thirty days of being asked to undertake an inquiry. However, before taking action to implement the Authority's finding that temporary assistance is necessary, the Minister is required first to refer the question of any permanent change in protection against imports to the Industries Assistance Commission for inquiry and report. Temporary protection recommended by the Authority may operate for a period of up to three months after the date of receipt of the final report by the Industries Assistance Commission on the goods concerned.

For further information on the Industries Assistance Commission see page 529.

Prices Justification Tribunal

The Prices Justification Tribunal was established in August 1973 pursuant to the *Prices Justification Act 1973*. The functions of the Tribunal are outlined in Section 16 of the Act and, briefly stated, provide that the Tribunal will consider the justification of proposed price increases put to it by companies which are subject to the notification provisions of the Act, i.e., companies or relevant groups of companies which receive more than \$20m annually as payments for the supply of goods or services or both. Following an amendment to the Act in August 1974, the prices charged by companies, which receive less than \$20m annually as payments for goods or services or both, may also be examined by the Tribunal.

The Tribunal consists of a chairman and such number of other members as are from time to time appointed by the Governor-General in accordance with the Act. The staff required to assist the Tribunal in the performance of its functions consists of persons appointed or employed under the *Public Service Act*

1922–1973. Further information concerning the Tribunal is contained in its annual reports to the Commonwealth Parliament.

Small Business Development Corporation

The Victorian Government, in recognition of the difficulties suffered by small business in times of economic downturn, introduced the Small Business Development Corporation Act which was passed in 1976.

The Small Business Development Corporation will assist in the encouragement, promotion, establishment, expansion, and development of the small business sector.

A "Small Business Advisory Agency" will also be established and its functions will be to provide information and assistance on the interpretation of the various Acts, rules, regulations, and by-laws that relate to, and have an effect on business. In addition, information will also be provided on current market trends. Training and education programmes on basic business principles will be provided and will take the form of seminars and literature to be provided.

In recognition of financial difficulties that may confront small business, government guarantees may be arranged following a report by the Corporation to the Treasurer.

Scientific research and standardisation

Commonwealth Scientific and Industrial Research Organisation

The C.S.I.R.O. is a statutory body established by the *Science and Industry Research Act* 1949–1973. Its principal functions under the Act are the carrying out of scientific research in connection with Australian primary and secondary industries or any other matter referred to it by the Minister for Science; the training of scientific research workers and the awarding of studentships; the making of grants in aid of scientific research; the recognition and support of research associations; the maintenance of the national standards of measurement; the dissemination of scientific and technical information; the publication of scientific and technical reports; and acting as a means of liaison between Australia and other countries in matters of scientific research.

Standards Association of Australia

This Association is the officially endorsed national organisation for the promotion of standardisation in Australia. It is an independent body having the full recognition and support of the Commonwealth and State Governments, and industry. Formed as the Australian Commonwealth Engineering Standards Association in 1922 it was reconstituted as the Standards Association of Australia in 1929. Approximately 45 per cent of its funds are provided by Commonwealth Government grant, the remainder coming from subscriptions and the sale of publications.

A Council composed of representatives of Commonwealth and State Government departments, associations of manufacturing and commercial interests, and professional institutions controls the Association's activities. The technical work of the Association is carried out on a voluntary basis by committees composed of experts in the particular subjects for which standards have been requested.

Industrial associations, firms, or government departments may request standards relating to such things as terminology, test methods, dimensions, specifications of performance and quality of products, and safety or design codes. Standards derive authority from voluntary adoption except in special cases where safety is involved, when they may have compulsory application. The Association owns a registered certification trade mark which manufacturers may obtain a licence to use.

The Association has international affiliations and maintains close links with overseas standards organisations. It acts as Australian agent for the procurement of overseas publications and the standards of other countries.

The headquarters office of the Association is in Sydney, and there is a major office in Melbourne. Branch offices are located in other capital cities and at Newcastle, New South Wales.

National Association of Testing Authorities

This is the Australian organisation for accreditation of testing and measuring facilities. It registers testing and measuring laboratories which can demonstrate their technical and managerial competence. Registration of laboratories is voluntary. Registered laboratories are operated by industrial, educational, and commercial testing authorities. The Association is recognised by all State Governments, the Commonwealth Government, and industry associations. Registered laboratories have the right to endorse their test documents in the name of the Association.

Industrial Design Council of Australia

The Industrial Design Council of Australia established its State Office for Victoria in 1969. The Council's purpose is to work for improved design in Australian manufactured products. It is financed by Commonwealth and State Governments.

The Council is advised by committees representing industry, commerce and government, designers and educationists. The main emphasis in the Council's programme is its design counselling service to all sections of manufacturing industry, particularly smaller companies. This service is furthering decentralisation objectives by assisting country manufacturers as well as those in the metropolitan area.

The State director arranges a programme of lectures and discussion meetings for senior executives and design consultants. Through Education Officers, talks can be arranged for teacher and student groups, as well as for other visitors.

The Australian Design Index and products entitled to use the Australian Design Award are on display at the Victorian office at 37 Little Collins Street, Melbourne.

MANUFACTURING INDUSTRY STATISTICS

Basis of collection

A series of substantially uniform statistics exists from 1901 to 1967-68 when the framework within which manufacturing statistics were collected was changed. The table on page 489 contains a summary of statistics on manufacturing activities in Victoria over that period. More detailed manufacturing statistics in respect of this period have been included in previous editions of the *Victorian Year Book*.

As from the year ended June 1969 the Censuses of Manufacturing, Electricity and Gas have been conducted within the framework of the integrated economic censuses, which include the Censuses of Mining, Retail Trade and Selected Services, and Wholesale Trade. As a result, manufacturing industry statistics for 1968-69 and subsequent years are not directly comparable with previous years. The electricity and gas industries, which were previously included in the annual Factory Census, were the subject of separate censuses. The integration of these economic censuses was designed to increase substantially the usefulness and comparability of economic statistics collected and published by the Bureau and to form a basis for the sample surveys which supply current economic statistics from quarter to quarter, particularly those which provide data for the quarterly national income and expenditure estimates.

The economic censuses of Manufacturing, Mining and Retail Trade previously conducted in Australia were originally designed and subsequently developed primarily to provide statistics for particular industries on a basis which would best suit the requirements of users interested in statistics of those industries. More recently there has been a growth of interest in statistics describing activity in the economy as a whole—reflected, for example, in the development of employment and earnings statistics, surveys of capital expenditure and stocks, and the whole field of national accounts statistics. For such purposes statistics derived from economic censuses in the past have had serious limitations despite the fact that they covered a broad area of the whole economy. Because of the special requirements of each of the censuses, there were no common definitions of data, there was no common system of reporting units, and, as a standard industrial classification was not used for these censuses, industry boundaries were not defined in ways which would avoid overlapping or gaps occurring between the industrial sectors covered. For these reasons, direct aggregation and comparison of statistics from different censuses were not possible.

The integration of these economic censuses meant that for the first time they were being collected on the basis of a common framework of reporting units and data concepts and in accordance with a standard industrial classification. As a result, the statistics for the industries covered by the censuses are now provided with no overlapping or gaps in coverage, and in such a way that aggregates for certain important economic data such as value added, employment, wages and salaries, fixed capital expenditure, and stocks can be obtained on a consistent basis for all sectors of the economy covered by the censuses.

As from the 1975–76 census only data on type of activity, employment, and wages and salaries, will be collected from single establishment manufacturing enterprises with less than four persons employed. This procedure is expected significantly to reduce the reporting obligations of small businesses, while only marginally affecting statistical aggregates other than number of establishments. To enable the effect of no longer collecting this data to be assessed, 1974–75 data has been split into two groups. All tables in this and subsequent *Victorian Year Books* will show details collected from all manufacturing establishments owned by multi-establishment enterprises and single establishment manufacturing enterprises employing four or more persons, while for 1974–75 some tables also show data collected from single establishment manufacturing enterprises employing less than four persons.

For a more detailed description of the integrated economic censuses, reference should be made to pages 368–89 of the *Victorian Year Book* 1971.

Summary of factory statistics

Factory statistics compiled for 1967–68 were the last of the old series, and definitions used in the 1967–68 and previous factory censuses were published in the *Victorian Year Book* 1971, pages 394–7. The first publication of statistics from the 1968–69 economic censuses, *Manufacturing Establishments and Electricity and Gas Establishments: preliminary statement*, was issued in January 1971 and contained information in respect of twelve industry sub-divisions permitting comparisons to be made between States, but did not permit comparisons to be made between 1968–69 and previous years because of the changes in the definition of the establishment, bases of classification, and forms.

In respect of 1974–75, the four metal products sub-divisions, namely, Basic metal products (sub-division 29), Fabricated metal products (sub-division 31), Transport equipment (sub-division 32), and Other machinery and equipment (sub-division 33), with 181,293 persons or 41.9 per cent of the total employment in manufacturing establishments in 1974–75, employed considerably more persons than any other part of manufacturing industry. Next in order of employment was Food, beverages, and tobacco (sub-division 21–22), with 60,848 or 14.0 per

cent, followed by Clothing and footwear (sub-division 24) and Paper, paper products, and printing (sub-division 26) with 49,195 and 34,187, respectively, or 11.4 per cent and 7.9 per cent of the total.

The following table shows, at intervals between 1901 and 1967-68, 1969-70, 1971-72, 1972-73, 1973-74, and 1974-75, the development of manufacturing activity in Victoria :

VICTORIA—DEVELOPMENT OF MANUFACTURING ACTIVITY

| Year | Manufacturing establishments | Employment (a) | Wages and salaries paid (b) | Value of— | | | |
|---------|------------------------------|----------------|-----------------------------|-------------------------|-------------|-----------|---------------------------------------|
| | | | | Materials and fuel used | Value added | Output | Land, buildings, plant, and machinery |
| | number | number | \$m | \$m | \$m | \$m | \$m |
| 1901 | 3,249 | 66,529 | n.a. | n.a. | n.a. | n.a. | 25 |
| 1911 | 5,126 | 111,948 | 18 | 51 | 32 | 84 | 28 |
| 1920-21 | 6,532 | 140,743 | 43 | 135 | 77 | 212 | 71 |
| 1932-33 | 8,612 | 144,428 | 42 | 122 | 82 | 204 | 136 |
| 1946-47 | 10,949 | 265,757 | 156 | 368 | 263 | 631 | 244 |
| 1953-54 | 15,533 | 331,277 | 472 | 1,154 | 817 | 1,971 | 679 |
| 1960-61 | 17,173 | 388,050 | 776 | 1,914 | 1,418 | 3,332 | 1,642 |
| 1965-66 | 17,980 | 439,149 | 1,077 | 2,597 | 2,028 | 4,625 | 2,386 |
| 1967-68 | 18,030 | 449,945 | 1,244 | 2,957 | 2,395 | 5,351 | 2,685 |
| 1968-69 | (c)11,563 | 431,651 | 1,342 | (d)3,861 | 2,542 | (e)6,336 | (f)278 |
| 1969-70 | (c)11,393 | 445,663 | 1,497 | (d)4,307 | 2,799 | (e)6,998 | (f)300 |
| 1971-72 | (c)11,408 | 450,026 | 1,800 | (d)4,812 | 3,328 | (e)8,055 | (f)374 |
| 1972-73 | (c)11,735 | 455,029 | 2,045 | (d)5,392 | 3,738 | (e)9,078 | (f)438 |
| 1973-74 | (c)12,070 | 469,838 | 2,524 | (d)6,486 | 4,546 | (e)10,669 | (f)418 |
| 1974-75 | {(g) (e)8,924 | 432,851 | 2,961 | (d)7,024 | 5,131 | (e)11,730 | (f)455 |
| | {(h) (c)2,834 | 5,727 | 17 | (d)53 | 48 | (e)100 | (f)2 |

- (a) Average over whole year, including working proprietors.
- (b) Excludes drawings of working proprietors.
- (c) Number of establishments operating at 30 June.
- (d) Purchases, transfers in, and selected expenses.
- (e) Turnover.
- (f) Fixed capital expenditure.
- (g) All manufacturing establishments owned by multi-establishment enterprises and single establishment manufacturing enterprises with four or more persons employed.
- (h) Single establishment manufacturing enterprises with less than four persons employed.

NOTE. A line drawn across a column between the figures indicates a break in continuity in the series. No census of manufacturing establishments was conducted for the year ending 30 June 1971.

A comparison between manufacturing activity in Victoria and the other States is shown in the following table:

AUSTRALIA MANUFACTURING ESTABLISHMENTS (g), 1974-75

| State or Territory | Establishments (c) | Employment (a) | Wages and salaries paid (b) | Purchases, transfers in, and selected expenses | Value added | Turnover | Fixed capital expenditure |
|------------------------------|--------------------|----------------|-----------------------------|--|-------------|----------|---------------------------|
| | number | number | \$m | \$m | \$m | \$m | \$m |
| New South Wales | 10,134 | 478,182 | 3,365 | 7,815 | 5,900 | 13,238 | 518 |
| Victoria | 8,924 | 432,851 | 2,961 | 7,024 | 5,131 | 11,730 | 455 |
| Queensland | 3,009 | 113,125 | 735 | 2,553 | 1,601 | 4,046 | 183 |
| South Australia | 2,128 | 120,510 | 792 | 1,805 | 1,332 | 2,998 | 138 |
| Western Australia | 1,974 | 65,852 | 434 | 1,332 | 780 | 2,032 | 103 |
| Tasmania | 630 | 28,940 | 196 | 560 | 404 | 908 | 53 |
| Northern Territory | 68 | 2,308 | 22 | 61 | 50 | 95 | -10 |
| Australian Capital Territory | 104 | 3,678 | 27 | 47 | 49 | 95 | 4 |
| Total | 26,971 | 1,245,446 | 8,533 | 21,196 | 15,246 | 35,141 | 1,446 |

For footnotes see previous table.

The total value added in 1974-75 was \$5,131m. Of this amount the Metal products sub-divisions contributed \$2,093m which represented 40.8 per cent of the total. The Food sub-division followed with \$866m or 16.9 per cent, and the next in order were the Paper, paper products, and printing with \$428m, 8.3 per cent, and the Clothing and footwear sub-division with \$379m, 7.4 per cent.

The following table contains a summary of manufacturing establishments by sub-division of industry in Victoria during the year 1974-75 :

VICTORIA—MANUFACTURING ESTABLISHMENTS (g) BY SUB-DIVISION OF INDUSTRY, 1974-75

| ASIC code | Industry sub-division | Establishments | Employment | Wages and salaries paid | Purchases, transfers in, and selected expenses | Value added | Turnover | Fixed capital expenditure |
|-----------|--|----------------|------------|-------------------------|--|-------------|----------|---------------------------|
| | | (c) | (a) | (b) | | | | |
| | | number | number | \$m | \$m | \$m | \$m | \$m |
| 21-2 | Food, beverages, and tobacco | 1,014 | 60,848 | 418 | 1,763 | 866 | 2,548 | 71 |
| 23 | Textiles | 322 | 22,933 | 144 | 300 | 209 | 534 | 19 |
| 24 | Clothing and footwear | 1,283 | 49,195 | 253 | 405 | 379 | 799 | 7 |
| 25 | Wood, wood products, and furniture | 1,044 | 19,231 | 116 | 238 | 208 | 438 | 12 |
| 26 | Paper, paper products, and printing | 880 | 34,187 | 245 | 438 | 428 | 833 | 49 |
| 27 | Chemical, petroleum, and coal products | 275 | 21,749 | 180 | 486 | 368 | 803 | 35 |
| 28 | Non-metallic mineral products | 353 | 14,027 | 108 | 197 | 216 | 403 | 30 |
| 29 | Basic metal products | 181 | 12,983 | 110 | 389 | 183 | 548 | 28 |
| 31 | Fabricated metal products | 1,124 | 37,796 | 255 | 448 | 421 | 845 | 36 |
| 32 | Transport equipment | 402 | 61,663 | 450 | 1,038 | 709 | 1,648 | 92 |
| 33 | Other machinery and equipment | 1,299 | 68,851 | 482 | 891 | 780 | 1,566 | 45 |
| 34 | Miscellaneous manufacturing | 747 | 29,388 | 202 | 430 | 365 | 766 | 30 |
| Total | | 8,924 | 432,851 | 2,961 | 7,024 | 5,131 | 11,730 | 455 |

For footnotes see page 489.

The following table shows the number of manufacturing establishments operating in Victoria at 30 June 1970, 1972, 1973, 1974, and 1975, classified according to sub-division of industry:

VICTORIA—NUMBER OF MANUFACTURING ESTABLISHMENTS BY SUB-DIVISION OF INDUSTRY AT 30 JUNE

| ASIC code | Industry sub-division | 1970 | 1972 | 1973 | 1974 | 1975 | |
|-----------|--|--------|--------|--------|--------|-------|-------|
| | | | | | | (g) | (h) |
| 21-2 | Food, beverages, and tobacco | 1,290 | 1,197 | 1,220 | 1,205 | 1,014 | 165 |
| 23 | Textiles | 371 | 384 | 398 | 420 | 322 | 58 |
| 24 | Clothing and footwear | 1,634 | 1,606 | 1,596 | 1,613 | 1,283 | 189 |
| 25 | Wood, wood products, and furniture | 1,478 | 1,473 | 1,488 | 1,569 | 1,044 | 516 |
| 26 | Paper, paper products, and printing | 1,145 | 1,156 | 1,205 | 1,238 | 880 | 324 |
| 27 | Chemical, petroleum, and coal products | 361 | 357 | 363 | 373 | 275 | 73 |
| 28 | Non-metallic mineral products | 449 | 446 | 445 | 472 | 353 | 100 |
| 29 | Basic metal products | 210 | 203 | 211 | 219 | 181 | 30 |
| 31 | Fabricated metal products | 1,496 | 1,477 | 1,518 | 1,553 | 1,124 | 420 |
| 32 | Transport equipment | 438 | 451 | 471 | 507 | 402 | 122 |
| 33 | Other machinery and equipment | 1,538 | 1,651 | 1,717 | 1,740 | 1,299 | 442 |
| 34 | Miscellaneous manufacturing | 983 | 1,007 | 1,103 | 1,161 | 747 | 395 |
| Total | | 11,393 | 11,408 | 11,735 | 12,070 | 8,924 | 2,834 |

For footnotes see page 489.

The size classification of manufacturing establishments is based on the number of persons employed at 30 June 1975 (including working proprietors). The following table shows the number of manufacturing establishments classified according to the number of persons employed:

VICTORIA—MANUFACTURING
ESTABLISHMENTS (a) CLASSIFIED
ACCORDING TO NUMBER OF
PERSONS EMPLOYED (INCLUDING
WORKING PROPRIETORS)
AT 30 JUNE 1975

| Manufacturing establishments employed persons numbering | Number of establishments | Number of persons employed (b) |
|---|--------------------------|--------------------------------|
| Less than 10 | 3,722 | 23,371 |
| 10 to 19 | 2,034 | 28,269 |
| 20 to 49 | 1,590 | 48,866 |
| 50 to 99 | 687 | 47,511 |
| 100 to 199 | 469 | 62,427 |
| 200 to 499 | 314 | 87,471 |
| 500 to 999 | 73 | 46,985 |
| 1,000 and over | 35 | 63,044 |
| Total | 8,924 | 407,944 |

- (a) All manufacturing establishments owned by multi-establishment enterprises and single establishment manufacturing enterprises with four or more persons employed. In addition, there were 2,834 single establishment enterprises employing 5,727 persons in the one to three persons employed group.
- (b) Excludes persons employed in separately located administrative offices and ancillary units serving more than one establishment, plus those serving only one establishment and which have ten or more employees and are located in a different Local Government Area to the establishment they serve. There were 13,707 persons employed in such separately located administrative offices and ancillary units at 30 June 1975.

The relative importance of large and small manufacturing establishments is illustrated in the preceding table. At 30 June 1975, 3,722 such establishments employing less than ten employees had a total employment of 23,371 persons. 41.7 per cent of manufacturing establishments—those employing less than ten persons—employed 5.7 per cent of the persons engaged. The most numerous of the establishments with less than ten persons were printing, stationery and book-binding, furniture (excluding sheet metal), joinery and wooden structured fittings, and industrial machinery and equipment, not elsewhere classified.

A general indication of the geographical distribution of manufacturing establishments in Victoria as at 30 June 1975 is shown in the following table where they are classified according to statistical divisions:

VICTORIA—MANUFACTURING ESTABLISHMENTS
IN STATISTICAL DIVISIONS, 1974-75

| Statistical division | Establishments (c) | Employment (a) | Wages and salaries paid (b) | | Purchases, transfers in, and selected expenses | Value added | Turnover | Fixed capital expenditure |
|----------------------|--------------------------|----------------|-----------------------------|-------|--|-------------|----------|---------------------------|
| | | | \$m | \$m | \$m | | | |
| Melbourne | { (g) 7,397 (h) 2,272 | 364,910 | 2,514 | 5,739 | 4,336 | 9,745 | 324 | |
| Barwon | { (g) 269 (h) 107 | 21,348 | 14 | 43 | 40 | 82 | 2 | |
| South Western | { (g) 115 (h) 49 | 4,895 | 153 | 354 | 235 | 559 | 58 | |
| Central Highlands | { (g) 107 (h) 115 | 213 | .. | 3 | 2 | 6 | .. | |
| Wimmera | { (g) 49 (h) 193 | 94 | 29 | 123 | 56 | 171 | 6 | |
| Northern Mallee | { (g) 68 (h) 49 | 1,264 | 62 | 123 | 102 | 220 | 12 | |
| Loddon-Campaspe | { (g) 68 (h) 35 | 96 | .. | 1 | 1 | 1 | .. | |
| Goulburn | { (g) 84 (h) 32 | 72 | 7 | 13 | 11 | 24 | 1 | |
| North Eastern | { (g) 84 (h) 180 | 1,070 | 6 | 22 | 15 | 33 | 2 | |
| East Gippsland | { (g) 32 (h) 170 | 59 | .. | 1 | .. | 1 | .. | |
| Central Gippsland | { (g) 180 (h) 94 | 9,346 | 56 | 163 | 92 | 250 | 4 | |
| | { (g) 170 (h) 70 | 5,916 | 40 | 165 | 82 | 226 | 8 | |
| | { (g) 117 (h) 32 | 4,435 | 29 | 95 | 65 | 155 | 8 | |
| | { (g) 101 (h) 24 | 2,220 | 13 | 44 | 33 | 74 | 7 | |
| | { (g) 175 (h) 42 | 6,255 | 43 | 161 | 89 | 236 | 26 | |
| | { (g) .. (h) .. | 91 | .. | 1 | 1 | 2 | .. | |

VICTORIA—MANUFACTURING ESTABLISHMENTS IN STATISTICAL DIVISIONS, 1974-75—*continued*

| Statistical division | | Establishments (c) | Employment (a) | Wages and salaries paid (b) | Purchases, transfers in, and selected expenses | Value added | Turnover | Fixed capital expenditure |
|----------------------|--------------|--------------------|------------------|-----------------------------|--|-------------|---------------|---------------------------|
| East Central | { (g) (h) | 55 28 | 1,355 56 | 8 .. | 25 1 | 14 .. | 37 1 | 1 .. |
| Total | { (g) (h) | 8,924 2,834 | 432,851 5,727 | 2,961 17 | 7,024 53 | 5,131 48 | 11,730 100 | 455 2 |

For footnotes see page 489

Manufacturing establishments in the Melbourne Statistical Division constituted 82.9 per cent of the total number in Victoria at 30 June 1975, 84.3 per cent of the persons employed, and 84.5 per cent of the value added.

The number of manufacturing establishments and persons employed therein, classified according to statistical division, is shown in the tables on pages 493-4.

It should be noted that Geelong is located in the Barwon Statistical Division, Bendigo, Castlemaine, and Maryborough in the Loddon-Campaspe Statistical Division, Ballarat in the Central Highlands Statistical Division, Warrnambool in the South Western Statistical Division, Shepparton in the Goulburn Statistical Division, Wangaratta in the North Eastern Statistical Division, and Morwell and Yallourn in the Central Gippsland Statistical Division.

Employment, wages, and salaries

Employment

From 1968-69 all persons employed in a manufacturing establishment and separately located administrative offices and ancillary units serving the establishment (including proprietors working in their own businesses) are included as persons employed. The grouping of occupations comprises (1) working proprietors; (2) administrative, office, sales, and distribution employees; and (3) production and all other employees.

The figures showing employment in manufacturing establishments represent either the average number of persons employed, including working proprietors, over a full year, or the number of persons employed at June each year.

VICTORIA—PERSONS EMPLOYED IN MANUFACTURING ESTABLISHMENTS, 1969-70 TO 1974-75

| ASIC code | Industry sub-division | 1969-70 | 1971-72 | 1972-73 | 1973-74 | 1974-75 | |
|-----------|--|---------|---------|---------|---------|---------|-------|
| | | | | | | (g) | (h) |
| 21-2 | Food, beverages, and tobacco | 60,125 | 62,805 | 63,847 | 63,668 | 60,848 | 362 |
| 23 | Textiles | 28,999 | 28,587 | 28,410 | 29,337 | 22,933 | 127 |
| 24 | Clothing and footwear | 64,258 | 61,772 | 60,896 | 60,096 | 49,195 | 403 |
| 25 | Wood, wood products, and furniture | 19,612 | 20,315 | 20,340 | 20,921 | 19,231 | 999 |
| 26 | Paper, paper products, and printing | 34,361 | 34,866 | 34,476 | 35,470 | 34,187 | 670 |
| 27 | Chemical, petroleum, and coal products | 22,862 | 22,638 | 22,566 | 23,175 | 21,749 | 151 |
| 28 | Non-metallic mineral products | 14,022 | 13,799 | 14,595 | 15,659 | 14,027 | 202 |
| 29 | Basic metal products | 11,332 | 11,680 | 12,829 | 13,181 | 12,983 | 71 |
| 31 | Fabricated metal products | 38,969 | 38,233 | 38,205 | 39,061 | 37,796 | 860 |
| 32 | Transport equipment | 56,237 | 59,579 | 60,909 | 64,982 | 61,663 | 239 |
| 33 | Other machinery and equipment | 65,906 | 65,856 | 66,601 | 71,297 | 68,851 | 876 |
| 34 | Miscellaneous manufacturing | 28,980 | 29,896 | 31,355 | 32,991 | 29,388 | 767 |
| | Total | 445,663 | 450,026 | 455,029 | 469,838 | 432,851 | 5,727 |

For footnotes see page 489.

The dominance of the metal fabricating sub-divisions (29-33) (including transport equipment, machinery, and other equipment), Food, beverages, and tobacco sub-division (21-2), and Clothing and footwear sub-division (24) should be noted. Female workers in manufacturing establishments at 30 June 1975 were 30.2 per cent of the total. Females exceeded males in the Clothing and footwear sub-division (24) where they accounted for 75.5 per cent of the sub-division total. Of the total females employed 28.4 per cent were in sub-division 24; 13.7 per cent were in sub-division 33; and 13.4 per cent were in sub-division 21-2.

VICTORIA—NUMBER OF MANUFACTURING ESTABLISHMENTS AND PERSONS EMPLOYED (g) IN EACH STATISTICAL DIVISION, CLASSIFIED ACCORDING TO STATISTICAL DIVISION AND INDUSTRY SUB-DIVISION, 1974-75

| ASIC code | Industry sub-division | Statistical division | | | | | | | | | | | Total | |
|-----------|--|----------------------|--------|---------------|--------------------|---------|------------------|----------------------|--------------|---------------|-----------------|--------------------|-------|--------------|
| | | Mel-bourne | Barwon | South Western | Central High-lands | Wimmera | North-ern Mallee | Loddon-Campaspe burn | Goul-Eastern | North Eastern | East Gipps-land | Central Gipps-land | | East Central |
| 21-2 | Food, beverages, and tobacco | {(g) (h) | 49 | 45 | 34 | 28 | 42 | 52 | 56 | 35 | 20 | 51 | 11 | 1,014 |
| 23 | Textiles | {(g) (h) | 80 | 4 | 2 | 8 | 9 | 14 | 10 | 7 | 7 | 13 | 3 | 165 |
| 24 | Clothing and footwear | {(g) (h) | 272 | 1 | 7 | 2 | 1 | 3 | 6 | 4 | 1 | 5 | 2 | 322 |
| 25 | Wood, wood products, and furniture | {(g) (h) | 52 | 1 | 2 | .. | .. | .. | .. | .. | .. | .. | .. | 58 |
| 26 | Paper, paper products, and printing | {(g) (h) | 1,199 | 5 | 13 | 2 | 1 | 17 | 10 | 1 | 1 | 18 | 3 | 1,283 |
| 27 | Chemical, petroleum, and coal products | {(g) (h) | 183 | .. | 1 | .. | 1 | 1 | .. | .. | .. | 1 | .. | 189 |
| 28 | Non-metallic mineral products | {(g) (h) | 725 | 17 | 36 | 8 | 3 | 22 | 38 | 32 | 55 | 43 | 26 | 1,044 |
| 29 | Basic metal products | {(g) (h) | 378 | 9 | 15 | 5 | 10 | 18 | 20 | 6 | 8 | 7 | 9 | 516 |
| 31 | Fabricated metal products | {(g) (h) | 750 | 15 | 17 | 8 | 9 | 16 | 13 | 8 | 6 | 13 | 5 | 880 |
| 32 | Transport equipment | {(g) (h) | 266 | 6 | 5 | 6 | 2 | 9 | 7 | 4 | 1 | 5 | 3 | 324 |
| 33 | Other machinery and equipment | {(g) (h) | 257 | 8 | 3 | 2 | .. | 3 | .. | 1 | .. | 1 | .. | 275 |
| 34 | Miscellaneous manufacturing | {(g) (h) | 65 | 3 | .. | .. | .. | 4 | .. | .. | .. | .. | .. | 73 |
| | | | 212 | 12 | 18 | 7 | 12 | 23 | 14 | 15 | 6 | 11 | 3 | 353 |
| | | | 51 | 8 | 4 | 1 | 2 | 16 | 7 | 2 | 2 | .. | .. | 100 |
| | | | 160 | 7 | 9 | .. | .. | 3 | .. | 1 | .. | .. | .. | 181 |
| | | | 25 | .. | 1 | .. | .. | 1 | .. | 1 | .. | .. | .. | 30 |
| | | | 991 | 31 | 8 | 4 | 5 | 18 | 16 | 9 | 4 | 19 | 1 | 1,124 |
| | | | 342 | 16 | 14 | 8 | 2 | 7 | 8 | 3 | 3 | 2 | 2 | 420 |
| | | | 347 | 14 | 3 | 17 | 1 | 3 | 7 | 2 | 3 | 2 | .. | 402 |
| | | | 95 | 3 | 2 | 1 | 1 | 3 | 5 | 1 | 1 | 4 | 1 | 122 |
| | | | 1,181 | 35 | 6 | 18 | 9 | 14 | 9 | 8 | 3 | 7 | 3 | 1,299 |
| | | | 373 | 14 | 5 | 7 | 4 | 1 | 14 | 9 | .. | 4 | 8 | 442 |
| | | | 712 | 14 | .. | 4 | 2 | 2 | 6 | .. | 2 | 5 | .. | 747 |
| | | | 362 | 10 | 1 | 3 | 2 | 5 | 4 | .. | 1 | 5 | 1 | 395 |
| | | | 7,397 | 269 | 115 | 68 | 84 | 180 | 170 | 117 | 101 | 175 | 55 | 8,924 |
| | | | 2,272 | 107 | 49 | 35 | 32 | 94 | 70 | 32 | 24 | 42 | 28 | 2,834 |
| | Total | {(g) (h) | | | | | | | | | | | | |

For footnotes see page 489.

VICTORIA—NUMBER OF MANUFACTURING ESTABLISHMENTS AND PERSONS EMPLOYED (a) IN EACH STATISTICAL DIVISION, CLASSIFIED ACCORDING TO STATISTICAL DIVISION AND INDUSTRY SUB-DIVISION, 1974-75—continued

| ASIC code | Industry sub-division | Statistical division | | | | | | | | | | | Total | |
|-----------|--|--------------------------------|----------------|---------------|--------------------|--------------|------------------|----------------------|--------------|---------------|-----------------|--------------------|--------------|------------------|
| | | Mel-bourne | Barwon Western | South Western | Central High-lands | Wimmera | North-ern Mallee | Loddon-Campaspe burn | Goul-burn | North Eastern | East Gipps-land | Central Gipps-land | | East Central |
| | | NUMBER OF PERSONS EMPLOYED (a) | | | | | | | | | | | | |
| 21-2 | Food, beverages, and tobacco | {(g) (h) 43,328 170 | 2,053 21 | 2,516 7 | 1,367 n.p. | 509 18 | 581 21 | 2,571 28 | 3,674 20 | 1,598 15 | 565 18 | 1,620 31 | 466 n.p. | 60,848 362 |
| 23 | Textiles | {(g) (h) 17,791 115 | 2,002 n.p. | n.p. n.p. | 513 n.p. | n.p. n.p. | n.p. n.p. | 615 n.p. | n.p. n.p. | n.p. n.p. | n.p. n.p. | 320 n.p. | n.p. n.p. | 22,933 127 |
| 24 | Clothing and footwear | {(g) (h) 42,603 390 | 1,473 n.p. | n.p. n.p. | 893 n.p. | n.p. n.p. | n.p. n.p. | 1,521 n.p. | 324 n.p. | n.p. n.p. | n.p. n.p. | 795 n.p. | 142 n.p. | 49,195 403 |
| 25 | Wood, wood products and furniture | {(g) (h) 13,891 747 | 640 57 | 306 14 | 753 25 | 84 10 | 33 17 | 408 31 | 598 36 | 504 12 | 1,148 17 | 610 14 | 256 16 | 19,231 999 |
| 26 | Paper, paper products, and printing | {(g) (h) 30,240 543 | n.p. 23 | 173 14 | 774 10 | 78 14 | 124 n.p. | 288 17 | 295 14 | 295 10 | 94 n.p. | n.p. 14 | 122 6 | 34,187 670 |
| 27 | Chemical, petroleum, and coal products | {(g) (h) 19,961 134 | 1,349 n.p. | n.p. n.p. | n.p. n.p. | n.p. n.p. | n.p. n.p. | 35 n.p. | n.p. n.p. | n.p. n.p. | n.p. n.p. | n.p. n.p. | n.p. n.p. | 21,749 151 |
| 28 | Non-metallic mineral products | {(g) (h) 11,192 105 | 1,247 17 | 70 12 | 561 8 | 68 n.p. | 88 n.p. | 232 34 | 149 15 | 148 n.p. | 22 n.p. | 217 n.p. | 33 n.p. | 14,027 202 |
| 29 | Basic metal products | {(g) (h) 9,216 60 | 2,554 n.p. | n.p. n.p. | 943 n.p. | n.p. n.p. | n.p. n.p. | n.p. n.p. | n.p. n.p. | n.p. n.p. | n.p. n.p. | n.p. n.p. | n.p. n.p. | 12,983 71 |
| 31 | Fabricated metal products | {(g) (h) 34,389 703 | 705 32 | 57 29 | n.p. 17 | 27 17 | 35 n.p. | 869 13 | 287 12 | 143 17 | 43 n.p. | 367 6 | n.p. n.p. | 37,796 860 |
| 32 | Transport equipment | {(g) (h) 52,488 190 | n.p. 5 | 24 n.p. | 2,248 n.p. | n.p. n.p. | 17 8 | 896 8 | n.p. 14 | n.p. n.p. | n.p. n.p. | n.p. n.p. | n.p. n.p. | 61,663 239 |
| 33 | Other machinery and equipment | {(g) (h) 61,208 749 | 2,998 23 | 238 10 | 916 14 | 128 10 | 136 n.p. | 1,788 27 | 239 15 | 330 n.p. | n.p. n.p. | n.p. n.p. | 16 14 | 68,831 876 |
| 34 | Miscellaneous manufacturing | {(g) (h) 28,603 706 | 262 20 | n.p. n.p. | 132 6 | n.p. n.p. | n.p. n.p. | n.p. n.p. | n.p. n.p. | n.p. n.p. | n.p. n.p. | 79 n.p. | n.p. n.p. | 29,388 767 |
| | Total | {(g) (h) 364,910 4,612 | 21,348 213 | 4,895 94 | 9,837 96 | 1,264 72 | 1,070 59 | 9,346 178 | 5,916 137 | 4,435 68 | 2,220 51 | 6,255 91 | 1,355 56 | 432,851 5,727 |

For footnotes see page 489.

In the following table the number of persons employed in manufacturing establishments in Victoria is classified according to the nature of their employment at the end of June for 1970, 1972, 1973, 1974 and 1975 :

VICTORIA—MANUFACTURING ESTABLISHMENTS :
TYPE OF EMPLOYMENT

| At 30 June— | Working proprietors | Administrative, office, sales, and distribution employees | Production and all other employees | Total |
|-------------|---------------------|---|------------------------------------|---------|
| 1970 | 6,904 | 102,053 | 341,395 | 450,352 |
| 1972 | 6,734 | 103,784 | 341,904 | 452,422 |
| 1973 | 7,101 | 108,364 | 348,066 | 463,531 |
| 1974 | 7,459 | 109,870 | 359,479 | 476,808 |
| 1975 (g) | 4,358 | 103,382 | 313,911 | 421,651 |
| (h) | 3,130 | 922 | 2,260 | 6,312 |

For footnotes see page 489.

The following table shows the nature of employment in manufacturing establishments at 30 June 1975 classified according to industry sub-division :

VICTORIA—MANUFACTURING ESTABLISHMENTS (g) : TYPE OF
EMPLOYMENT BY INDUSTRY SUB-DIVISION AT 30 JUNE 1975

| ASIC code | Industry sub-division | Working proprietors | Administrative, office, sales, and distribution employees | Production and all other employees | Total |
|-----------|--|---------------------|---|------------------------------------|---------|
| 21-2 | Food, beverages, and tobacco | 666 | 15,684 | 42,004 | 58,354 |
| 23 | Textiles | 80 | 4,553 | 18,761 | 23,394 |
| 24 | Clothing and footwear | 805 | 6,238 | 41,499 | 48,542 |
| 25 | Wood, wood products, and furniture | 707 | 3,360 | 15,408 | 19,475 |
| 26 | Paper, paper products, and printing | 405 | 9,882 | 23,155 | 33,442 |
| 27 | Chemical, petroleum, and coal products | 55 | 9,596 | 11,565 | 21,216 |
| 28 | Non-metallic mineral products | 94 | 3,353 | 10,334 | 13,781 |
| 29 | Basic metal products | 53 | 4,215 | 8,298 | 12,566 |
| 31 | Fabricated metal products | 558 | 9,060 | 26,985 | 36,603 |
| 32 | Transport equipment | 166 | 13,381 | 46,016 | 59,563 |
| 33 | Other machinery and equipment | 435 | 17,079 | 48,747 | 66,261 |
| 34 | Miscellaneous manufacturing | 334 | 6,981 | 21,139 | 28,454 |
| | Total | 4,358 | 103,382 | 313,911 | 421,651 |

For footnote see page 489.

Although "production and all other employees" constitute 74.4 per cent of the total number employed in manufacturing establishments, the percentage varies from 85.5 per cent in sub-division 24 to 54.5 per cent in sub-division 27. Sub-division 27 also has the highest percentage of "administrative, office, sales, and distribution employees", 45.2 per cent, compared with the Victorian average of 24.5 per cent.

Where small establishments predominate there is usually a higher proportion of working proprietors than on the average and a smaller than average managerial and clerical staff. This is particularly evident in sub-division 25 where working proprietors comprise 3.6 per cent of the total number employed.

**VICTORIA—MANUFACTURING ESTABLISHMENTS:
FEMALE EMPLOYMENT AT 30 JUNE**

| ASIC code | Industry sub-division | Number | | | | | |
|--------------|--|---------|---------|---------|---------|---------|-------|
| | | 1970 | 1972 | 1973 | 1974 | 1975 | |
| | | | | | | (g) | (h) |
| 21-2 | Food, beverages, and tobacco— | | | | | | |
| 211 | Meat products | 2,743 | 3,675 | 3,279 | 3,315 | 3,101 | 16 |
| 213 | Fruit and vegetable products | 2,141 | 1,814 | 2,193 | 2,132 | 1,587 | 1 |
| 216 | Bread, cakes, and biscuits | 3,613 | 3,373 | 3,758 | 3,979 | 3,428 | 64 |
| 217-8 | Sugar and other food products | 2,938 | 3,352 | 3,314 | 4,144 | 3,482 | 10 |
| | Other | 4,496 | 4,358 | 4,755 | 5,127 | 4,922 | 34 |
| | Total | 15,931 | 16,572 | 17,299 | 18,697 | 16,520 | 125 |
| 23 | Textiles— | | | | | | |
| 231-2 | Textiles, yarns, and woven fabrics | 9,512 | 9,008 | 8,977 | 8,586 | 6,721 | 20 |
| | Other | 2,775 | 3,088 | 3,151 | 3,384 | 3,048 | 34 |
| | Total | 12,287 | 12,096 | 12,128 | 11,970 | 9,769 | 54 |
| 24 | Clothing and footwear— | | | | | | |
| 241 | Knitting mills | 10,522 | 10,028 | 9,987 | 10,098 | 8,184 | 37 |
| 242 | Clothing | 31,103 | 30,207 | 29,699 | 28,748 | 23,220 | 175 |
| 243 | Footwear | 7,685 | 6,902 | 6,745 | 5,866 | 4,944 | 19 |
| | Total | 49,310 | 47,137 | 46,431 | 44,712 | 36,348 | 231 |
| 25 | Wood, wood products, and furniture | 2,622 | 2,833 | 2,994 | 3,337 | 3,015 | 216 |
| 26 | Paper, paper products, and printing | 9,545 | 9,484 | 9,580 | 10,004 | 8,899 | 254 |
| 27 | Chemical, petroleum, and coal products | 6,295 | 5,892 | 5,951 | 6,256 | 5,617 | 49 |
| 28 | Non-metallic mineral products | 1,832 | 1,821 | 2,026 | 2,273 | 1,812 | 43 |
| 29 | Basic metal products | 1,162 | 1,257 | 1,466 | 1,585 | 1,400 | 16 |
| 31 | Fabricated metal products | 7,498 | 7,362 | 8,168 | 8,812 | 7,353 | 149 |
| 32 | Transport equipment | 8,154 | 8,583 | 9,527 | 11,788 | 8,852 | 45 |
| 33 | Other machinery and equipment— | | | | | | |
| 332 | Appliances and electrical equipment | 10,656 | 10,665 | 12,364 | 13,805 | 10,894 | 69 |
| 333 | Industrial machinery and equipment | 3,944 | 3,725 | 4,129 | 4,514 | 3,868 | 112 |
| | Other | 1,532 | 1,761 | 1,781 | 1,884 | 1,857 | 16 |
| | Total | 16,132 | 16,151 | 18,274 | 20,203 | 16,619 | 197 |
| 34 | Miscellaneous manufacturing | 9,692 | 10,390 | 11,250 | 12,139 | 9,485 | 250 |
| | Total | 140,460 | 139,578 | 145,094 | 151,776 | 125,689 | 1,629 |

For footnotes see page 489.

**VICTORIA—MANUFACTURING ESTABLISHMENTS:
EMPLOYMENT (a) OF MALES AND FEMALES**

| Year | Males | | Females | | Total | |
|---------|---------------|---------------------------------------|---------|---|---------|--|
| | Number | Average per 10,000 of male population | Number | Average per 10,000 of female population | Number | Average per 10,000 of total population |
| 1901 | 47,059 | 773 | 19,470 | 324 | 66,529 | 550 |
| 1911 | 73,573 | 1,100 | 38,375 | 572 | 111,948 | 835 |
| 1920-21 | 96,379 | 1,279 | 44,364 | 573 | 140,743 | 921 |
| 1932-33 | 91,899 | 1,020 | 52,529 | 576 | 144,428 | 796 |
| 1946-47 | 188,758 | 1,876 | 76,999 | 745 | 265,757 | 1,303 |
| 1953-54 | 240,698 | 1,986 | 90,579 | 752 | 331,277 | 1,371 |
| 1960-61 | 280,207 | 1,927 | 107,843 | 752 | 388,050 | 1,344 |
| 1965-66 | 310,303 | 1,937 | 128,846 | 808 | 439,149 | 1,374 |
| 1967-68 | 316,108 | 1,912 | 133,837 | 811 | 449,945 | 1,362 |
| 1968-69 | 297,411 | 1,771 | 134,240 | 800 | 431,651 | 1,286 |
| 1969-70 | 306,917 | 1,794 | 138,746 | 812 | 445,663 | 1,303 |
| 1971-72 | 310,750 | 1,760 | 139,276 | 786 | 450,026 | 1,273 |
| 1972-73 | 314,259 | 1,758 | 140,770 | 785 | 455,029 | 1,271 |
| 1973-74 | 320,921 | 1,779 | 148,917 | 822 | 469,838 | 1,299 |
| 1974-75 | { (g) 302,234 | 1,650 | 130,617 | 711 | 432,851 | 1,180 |
| | { (h) 4,275 | 23 | 1,452 | 8 | 5,727 | 16 |

For footnotes see page 489.

In sub-division 29, Basic metal products, the proportion of females to total persons employed is at its lowest, 10.9 per cent. In sub-division 24, Clothing and footwear, females predominate and comprise 75.5 per cent of the total number of persons employed; within this sub-division in the Clothing group, 242, 82.3 per cent of the total employed are females.

The numbers of males and females employed in manufacturing establishments, and the proportions of the average male and female population working in these establishments in 1974-75 and earlier years are shown in the previous table.

Wages and salaries

The next table gives details of wages paid in the various classes of industry in Victoria in 1974-75. Amounts paid to "administrative, office, sales, and distribution employees" are shown separately from those paid to "production and all other workers". It should be noted that in all tables of salaries and wages paid the amounts drawn by working proprietors are excluded.

VICTORIA—MANUFACTURING ESTABLISHMENTS (g) :
WAGES AND SALARIES PAID, 1974-75
(\$m)

| ASIC code | Industry sub-division | Paid to— | | |
|-----------|--|---|----------------------------------|---------------|
| | | Administrative, office, sales, and distribution employees | Production and all other workers | All employees |
| 21-2 | Food, beverages, and tobacco | 130 | 288 | 418 |
| 23 | Textiles | 34 | 109 | 144 |
| 24 | Clothing and footwear | 48 | 205 | 253 |
| 25 | Wood, wood products, and furniture | 25 | 91 | 116 |
| 26 | Paper, paper products, and printing | 83 | 162 | 245 |
| 27 | Chemical, petroleum, and coal products | 89 | 91 | 180 |
| 28 | Non-metallic mineral products | 29 | 79 | 108 |
| 29 | Basic metal products | 41 | 69 | 110 |
| 31 | Fabricated metal products | 73 | 182 | 255 |
| 32 | Transport equipment | 127 | 323 | 450 |
| 33 | Other machinery and equipment | 149 | 333 | 482 |
| 34 | Miscellaneous manufacturing | 63 | 139 | 202 |
| | Total | 891 | 2,071 | 2,961 |

For footnote see page 489.

Of the total amount of wages and salaries paid in Victoria in 1974-75—\$2,961m—the metal fabricating sub-divisions (29-33) (including transport equipment, machinery, and other equipment), were responsible for \$1,297m or 43.8 per cent; Food, beverages, and tobacco \$418m or 14.1 per cent; Clothing and footwear, \$253m or 8.5 per cent; and Paper, paper products, and printing, \$245m or 8.3 per cent.

Turnover

The following table shows the value of turnover of manufacturing establishments. The figures include sales of goods whether produced by this establishment or not, transfers out of goods to other establishments of the same enterprise, bounties and subsidies on production, plus all other operating revenue from outside the enterprise, such as commission, repair and service revenue, and

the value of capital work done on own account. Rents, leasing revenue, interest (other than hire purchase), royalties, and receipts from the sale of fixed tangible assets are excluded.

**VICTORIA—MANUFACTURING ESTABLISHMENTS :
TURNOVER BY INDUSTRY SUB-DIVISION
(\$m)**

| ASIC code | Industry sub-division | 1969-70 | 1971-72 | 1972-73 | 1973-74 | 1974-75 | |
|--------------|--|--------------|--------------|--------------|---------------|---------------|------------|
| | | | | | | (g) | (h) |
| 21-2 | Food, beverages, and tobacco | 1,598 | 1,869 | 2,168 | 2,391 | 2,548 | 8 |
| 23 | Textiles | 392 | 432 | 505 | 621 | 534 | 2 |
| 24 | Clothing and footwear | 565 | 637 | 681 | 800 | 799 | 7 |
| 25 | Wood, wood products, and furniture | 242 | 273 | 318 | 393 | 438 | 14 |
| 26 | Paper, paper products, and printing | 472 | 548 | 617 | 725 | 833 | 11 |
| 27 | Chemical, petroleum, and coal products | 469 | 564 | 617 | 751 | 803 | 3 |
| 28 | Non-metallic mineral products | 222 | 256 | 307 | 369 | 403 | 6 |
| 29 | Basic metal products | 274 | 280 | 340 | 467 | 548 | 2 |
| 31 | Fabricated metal products | 505 | 572 | 620 | 758 | 845 | 15 |
| 32 | Transport equipment | 948 | 1,151 | 1,227 | 1,387 | 1,648 | 5 |
| 33 | Other machinery and equipment | 887 | 981 | 1,109 | 1,315 | 1,566 | 16 |
| 34 | Miscellaneous manufacturing | 423 | 492 | 569 | 693 | 766 | 12 |
| | Total | 6,998 | 8,055 | 9,078 | 10,669 | 11,730 | 100 |

For footnotes see page 489.

Purchases, transfers in, and selected items of expense

In the following table the figures include purchases of materials, fuel, power, containers, etc., plus transfers in of goods from other establishments of the enterprise, plus charges for commission and sub-contract work, repair and maintenance expenses, outward freight and cartage, motor vehicle running expenses, and sales commission payments :

**VICTORIA—MANUFACTURING ESTABLISHMENTS: PURCHASES AND
SELECTED ITEMS OF EXPENSE BY INDUSTRY SUB-DIVISION
(\$m)**

| ASIC code | Industry sub-division | 1969-70 | 1971-72 | 1972-73 | 1973-74 | 1974-75 | |
|--------------|--|--------------|--------------|--------------|--------------|--------------|-----------|
| | | | | | | (g) | (h) |
| 21-2 | Food, beverages, and tobacco | 1,166 | 1,302 | 1,510 | 1,695 | 1,763 | 5 |
| 23 | Textiles | 236 | 266 | 311 | 402 | 300 | 1 |
| 24 | Clothing and footwear | 322 | 350 | 371 | 451 | 405 | 3 |
| 25 | Wood, wood products, and furniture | 137 | 155 | 175 | 221 | 238 | 7 |
| 26 | Paper, paper products, and printing | 249 | 280 | 308 | 371 | 438 | 5 |
| 27 | Chemical, petroleum, and coal products | 265 | 321 | 351 | 422 | 486 | 2 |
| 28 | Non-metallic mineral products | 119 | 133 | 152 | 188 | 197 | 3 |
| 29 | Basic metal products | 195 | 184 | 235 | 332 | 389 | 1 |
| 31 | Fabricated metal products | 287 | 311 | 324 | 423 | 448 | 7 |
| 32 | Transport equipment | 573 | 702 | 746 | 848 | 1,038 | 2 |
| 33 | Other machinery and equipment | 506 | 525 | 591 | 737 | 891 | 8 |
| 34 | Miscellaneous manufacturing | 253 | 282 | 316 | 395 | 430 | 7 |
| | Total | 4,307 | 4,812 | 5,392 | 6,486 | 7,024 | 53 |

For footnotes see page 489.

Stocks

The figures in the following tables include all stocks of materials, fuels, etc., finished goods and work-in-progress whether located at the establishment or elsewhere. It should be noted that due to reporting differences on individual

returns and variations in the number of establishments from year to year, the closing stocks in one year may differ from the opening stocks in the following year.

VICTORIA—MANUFACTURING ESTABLISHMENTS:
STOCKS BY INDUSTRY SUB-DIVISION
(\$m)

| ASIC code | Industry sub-division | 1969-70 | 1971-72 | 1972-73 | 1973-74 | 1974-75 | |
|-----------|--|---------|---------|---------|---------|---------|-----|
| | | | | | | (g) | (h) |
| OPENING | | | | | | | |
| 21-2 | Food, beverages, and tobacco | 209 | 237 | 252 | 266 | 295 | 1 |
| 23 | Textiles | 76 | 89 | 94 | 105 | 149 | .. |
| 24 | Clothing and footwear | 89 | 99 | 105 | 113 | 144 | 1 |
| 25 | Wood, wood products, and furniture | 32 | 37 | 41 | 41 | 54 | 1 |
| 26 | Paper, paper products, and printing | 63 | 79 | 79 | 81 | 104 | 1 |
| 27 | Chemical, petroleum, and coal products | 92 | 106 | 113 | 119 | 131 | .. |
| 28 | Non-metallic mineral products | 26 | 32 | 36 | 35 | 41 | .. |
| 29 | Basic metal products | 40 | 51 | 59 | 64 | 79 | .. |
| 31 | Fabricated metal products | 90 | 106 | 113 | 118 | 149 | 1 |
| 32 | Transport equipment | 171 | 200 | 229 | 220 | 282 | .. |
| 33 | Other machinery and equipment | 233 | 287 | 291 | 295 | 370 | 1 |
| 34 | Miscellaneous manufacturing | 72 | 80 | 89 | 95 | 121 | 1 |
| Total | | 1,193 | 1,403 | 1,502 | 1,553 | 1,919 | 8 |
| CLOSING | | | | | | | |
| 21-2 | Food, beverages, and tobacco | 225 | 253 | 271 | 296 | 376 | .. |
| 23 | Textiles | 80 | 95 | 100 | 149 | 124 | .. |
| 24 | Clothing and footwear | 96 | 102 | 115 | 141 | 129 | 1 |
| 25 | Wood, wood products, and furniture | 33 | 40 | 42 | 55 | 62 | 1 |
| 26 | Paper, paper products, and printing | 73 | 81 | 78 | 100 | 138 | 1 |
| 27 | Chemical, petroleum, and coal products | 99 | 107 | 119 | 135 | 181 | .. |
| 28 | Non-metallic mineral products | 28 | 36 | 34 | 44 | 52 | .. |
| 29 | Basic metal products | 42 | 55 | 68 | 81 | 104 | .. |
| 31 | Fabricated metal products | 99 | 116 | 120 | 148 | 173 | 1 |
| 32 | Transport equipment | 188 | 232 | 217 | 277 | 380 | .. |
| 33 | Other machinery and equipment | 261 | 286 | 294 | 368 | 475 | 1 |
| 34 | Miscellaneous manufacturing | 78 | 86 | 94 | 122 | 150 | 1 |
| Total | | 1,301 | 1,489 | 1,553 | 1,915 | 2,344 | 8 |

For footnotes see page 489.

Value added

Statistics on value added in the following table have been calculated by adding to turnover the increase (or deducting the decrease) in value of stocks and deducting the value of purchases and selected items of expense :

VICTORIA—MANUFACTURING ESTABLISHMENTS:
VALUE ADDED BY INDUSTRY SUB-DIVISION
(\$m)

| ASIC code | Industry sub-division | 1969-70 | 1971-72 | 1972-73 | 1973-74 | 1974-75 | |
|-----------|--|---------|---------|---------|---------|---------|-----|
| | | | | | | (g) | (h) |
| 21-2 | Food, beverages, and tobacco | 447 | 583 | 677 | 727 | 866 | 3 |
| 23 | Textiles | 161 | 173 | 200 | 263 | 209 | 1 |
| 24 | Clothing and footwear | 250 | 289 | 320 | 377 | 379 | 3 |
| 25 | Wood, wood products, and furniture | 106 | 121 | 144 | 186 | 208 | 7 |
| 26 | Paper, paper products, and printing | 232 | 269 | 309 | 372 | 428 | 6 |
| 27 | Chemical, petroleum, and coal products | 211 | 244 | 271 | 345 | 368 | 1 |
| 28 | Non-metallic mineral products | 105 | 127 | 153 | 189 | 216 | 2 |
| 29 | Basic metal products | 81 | 100 | 113 | 155 | 183 | 1 |
| 31 | Fabricated metal products | 226 | 271 | 303 | 361 | 421 | 8 |
| 32 | Transport equipment | 392 | 478 | 469 | 596 | 709 | 2 |
| 33 | Other machinery and equipment | 409 | 456 | 521 | 651 | 780 | 8 |
| 34 | Miscellaneous manufacturing | 177 | 216 | 258 | 325 | 365 | 6 |
| Total | | 2,799 | 3,328 | 3,738 | 4,546 | 5,131 | 48 |

For footnotes see page 489.

Relation of costs to turnover and value added

Certain costs of production, the value of turnover, movement in stocks, and the balance available for profit, interest, rent, taxation, depreciation, etc., in each sub-division of manufacturing industry during 1974-75 are given in the following tables :

VICTORIA—MANUFACTURING ESTABLISHMENTS (g) :
COSTS AND TURNOVER, 1974-75
(\$m)

| ASIC code | Industry sub-division | Cost of— | | Movement in stocks | Balance between turnover, stocks, and costs (a) | Turnover |
|-----------|--|---|--------------------|--------------------|---|----------|
| | | Purchases and selected items of expense | Wages and salaries | | | |
| 21-2 | Food, beverages, and tobacco | 1,763 | 418 | + 81 | 448 | 2,548 |
| 23 | Textiles | 300 | 144 | - 25 | 65 | 534 |
| 24 | Clothing and footwear | 405 | 253 | - 15 | 126 | 799 |
| 25 | Wood, wood products, and furniture | 238 | 116 | + 8 | 92 | 438 |
| 26 | Paper, paper products, and printing | 438 | 245 | + 34 | 184 | 833 |
| 27 | Chemical, petroleum, and coal products | 486 | 180 | + 50 | 187 | 803 |
| 28 | Non-metallic mineral products | 197 | 108 | + 11 | 109 | 403 |
| 29 | Basic metal products | 389 | 110 | + 25 | 74 | 548 |
| 31 | Fabricated metal products | 448 | 255 | + 24 | 16.6 | 845 |
| 32 | Transport equipment | 1,038 | 450 | + 98 | 258 | 1,648 |
| 33 | Other machinery and equipment | 891 | 482 | +105 | 298 | 1,566 |
| 34 | Miscellaneous manufacturing | 430 | 202 | + 29 | 163 | 766 |
| Total | | 7,024 | 2,961 | + 425 | 2,170 | 11,730 |

(a) Balance available to provide for all other costs and overhead expenses such as rent, interest, insurance, pay-roll tax, income tax, depreciation, etc., as well as drawings by working proprietors and profit.

For footnote (g) see page 489.

VICTORIA—MANUFACTURING ESTABLISHMENTS (g) : PERCENTAGE OF
SPECIFIED COSTS TO TURNOVER, 1974-75
(per cent)

| ASIC code | Industry sub-division | Cost of— | | Movement in stocks | Balance between turnover, stocks, and costs (a) | Turnover |
|-----------|--|---|--------------------|--------------------|---|----------|
| | | Purchases and selected items of expense | Wages and salaries | | | |
| 21-2 | Food, beverages, and tobacco | 69.2 | 16.4 | + 3.2 | 17.6 | 100.0 |
| 23 | Textiles | 56.2 | 27.0 | - 4.6 | 12.2 | 100.0 |
| 24 | Clothing and footwear | 50.7 | 31.7 | - 1.8 | 15.8 | 100.0 |
| 25 | Wood, wood products, and furniture | 54.3 | 26.5 | + 1.8 | 21.0 | 100.0 |
| 26 | Paper, paper products, and printing | 52.6 | 29.4 | + 4.1 | 22.1 | 100.0 |
| 27 | Chemical, petroleum, and coal products | 60.5 | 22.4 | + 6.2 | 23.3 | 100.0 |
| 28 | Non-metallic mineral products | 48.9 | 26.8 | + 2.7 | 27.0 | 100.0 |
| 29 | Basic metal products | 71.0 | 20.1 | + 4.6 | 13.5 | 100.0 |
| 31 | Fabricated metal products | 53.0 | 30.2 | + 2.8 | 19.6 | 100.0 |
| 32 | Transport equipment | 63.0 | 27.3 | + 6.0 | 15.7 | 100.0 |
| 33 | Other machinery and equipment | 57.0 | 30.8 | + 6.8 | 19.0 | 100.0 |
| 34 | Miscellaneous manufacturing | 56.1 | 26.4 | + 3.8 | 21.3 | 100.0 |
| Total | | 60.0 | 25.2 | + 3.7 | 18.5 | 100.0 |

(a) Balance available to provide for all other costs and overhead expenses such as rent, interest, insurance, pay-roll tax, income tax, depreciation, etc., as well as drawings by working proprietors and profit.

For footnote (g) see page 489.

There are considerable variations in the proportions which purchases and selected items of expenditure, and wages and salaries, bear to the turnover in

the different sub-divisions. These are, of course, due to the difference in the treatment required to convert materials to their final form. Thus in sub-division 24 the sum paid in wages represents 31.7 per cent and the purchases and selected items of expense 50.7 per cent of the values of the finished articles, while in sub-division 21.22 the expenditure on wages amounts to 16.4 per cent and that on purchases, etc., to 69.2 per cent of the value of turnover.

In the following table specified costs of production, the value of turnover of manufacturing establishments, and the balance available for profit and miscellaneous expenses are compared for each of the years 1969-70, 1971-72, 1972-73, 1973-74, and 1974-75 :

VICTORIA—MANUFACTURING ESTABLISHMENTS: SPECIFIED COSTS OF PRODUCTION, ETC., AND TURNOVER
(\$m)

| Year | Cost of— | | Movement in stocks | Balance between turnover, stocks, and costs (a) | Turnover |
|---------|---|--------------------|--------------------|---|----------|
| | Purchases and selected items of expense | Wages and salaries | | | |
| 1969-70 | 4,307 | 1,497 | +108 | 1,302 | 6,998 |
| 1971-72 | 4,812 | 1,800 | + 86 | 1,529 | 8,055 |
| 1972-73 | 5,392 | 2,045 | + 51 | 1,692 | 9,078 |
| 1973-74 | 6,486 | 2,524 | +362 | 2,021 | 10,669 |
| 1974-75 | (g) 7,024 | 2,961 | +425 | 2,170 | 11,730 |
| | (h) 53 | 17 | .. | 30 | 100 |

(a) Balance available to provide for all other costs, such as rent, interest, insurance, pay-roll tax, income tax, depreciation, etc., as well as drawings by working proprietors and profit.

For footnotes (g) and (h) see page 489.

In the following table the components of cost are converted to their respective percentages of the value of turnover :

VICTORIA—MANUFACTURING ESTABLISHMENTS: PERCENTAGE OF SPECIFIED COSTS OF PRODUCTION, ETC., TO TURNOVER
(per cent)

| Year | Cost of— | | Movement in stocks | Balance between turnover, stocks, and costs (a) | Turnover |
|---------|---|--------------------|--------------------|---|----------|
| | Purchases and selected items of expense | Wages and salaries | | | |
| 1969-70 | 61.6 | 21.4 | +1.6 | 18.6 | 100.0 |
| 1971-72 | 59.7 | 22.4 | +1.1 | 19.0 | 100.0 |
| 1972-73 | 59.4 | 22.5 | +0.6 | 18.7 | 100.0 |
| 1973-74 | 60.8 | 23.7 | +3.4 | 18.9 | 100.0 |
| 1974-75 | (g) 60.0 | 25.2 | +3.7 | 18.5 | 100.0 |
| | (h) 53.0 | 17.0 | .. | 30.0 | 100.0 |

(a) Balance available to provide for all other costs, such as rent, interest, insurance, pay-roll tax, income tax, depreciation, etc., as well as drawings by working proprietors and profit.

For footnotes (g) and (h) see page 489.

Fixed capital expenditure and rent leasing

Fixed capital expenditure is the outlay on new and second-hand fixed tangible assets less disposals. Rent and leasing expense is the amount paid for renting and leasing of premises, vehicles, and equipment. The following table shows fixed capital expenditure and rent and leasing expenses for 1974-75 by industry sub-division :

VICTORIA—MANUFACTURING ESTABLISHMENTS (g) : FIXED CAPITAL
EXPENDITURE AND RENT AND LEASING EXPENSES, 1974-75
(\$'000)

| ASIC code | Industry sub-division | Fixed capital expenditure | | | Rent and leasing expenses |
|--------------|--|--|--|---------|------------------------------------|
| | | Land, buildings, and other structures | Vehicles plant, machinery, and equipment | Total | |
| 21-2 | Food, beverages, and tobacco | 14,237 | 56,453 | 70,690 | 16,877 |
| 23 | Textiles | 1,216 | 17,873 | 19,088 | 5,681 |
| 24 | Clothing and footwear | 1,055 | 6,672 | 7,727 | 9,922 |
| 25 | Wood, wood products, and furniture | 3,064 | 8,796 | 11,860 | 6,830 |
| 26 | Paper, paper products, and printing | 6,530 | 42,923 | 49,453 | 9,551 |
| 27 | Chemical, petroleum, and coal products | 10,288 | 24,310 | 34,598 | 4,737 |
| 28 | Non-metallic mineral products | 4,316 | 25,714 | 30,030 | 2,369 |
| 29 | Basic metal products | 7,708 | 20,042 | 27,750 | 2,598 |
| 31 | Fabricated metal products | 4,511 | 31,877 | 36,387 | 9,217 |
| 32 | Transport equipment | 21,900 | 69,691 | 91,590 | 7,500 |
| 33 | Other machinery and equipment | 7,232 | 38,225 | 45,456 | 15,240 |
| 34 | Miscellaneous manufacturing | 9,875 | 20,288 | 30,163 | 9,765 |
| | Total | 91,932 | 362,863 | 454,794 | 100,288 |

For footnote see page 489.

In the next table fixed capital expenditure by industry sub-division is shown for 1969-70, 1971-72, 1972-73, 1973-74, and 1974-75 :

VICTORIA—MANUFACTURING ESTABLISHMENTS:
FIXED CAPITAL EXPENDITURE
(\$'000)

| ASIC code | Industry sub-division | 1969-70 | 1971-72 | 1972-73 | 1973-74 | 1974-75 | |
|--------------|--|---------|---------|---------|---------|---------|-------|
| | | | | | | (g) | (h) |
| 21-2 | Food, beverages, and tobacco | 42,337 | 53,132 | 64,052 | 76,211 | 70,690 | 165 |
| 23 | Textiles | 22,928 | 14,268 | 12,248 | 29,981 | 19,088 | 19 |
| 24 | Clothing and footwear | 12,320 | 11,896 | 10,815 | 11,333 | 7,727 | 121 |
| 25 | Wood, wood products, and furniture | 5,107 | 4,328 | 12,333 | 15,431 | 11,860 | 313 |
| 26 | Paper, paper products, and printing | 17,839 | 41,770 | 38,163 | 33,284 | 49,453 | 243 |
| 27 | Chemical, petroleum, and coal products | 44,351 | 39,465 | 61,332 | 32,606 | 34,598 | 20 |
| 28 | Non-metallic mineral products | 16,064 | 10,072 | 17,564 | 42,488 | 30,030 | 56 |
| 29 | Basic metal products | 22,584 | 54,053 | 88,140 | 21,442 | 27,750 | 21 |
| 31 | Fabricated metal products | 20,528 | 26,034 | 21,159 | 20,642 | 36,387 | 267 |
| 32 | Transport equipment | 46,566 | 58,591 | 56,097 | 61,758 | 91,590 | 89 |
| 33 | Other machinery and equipment | 32,782 | 36,573 | 35,613 | 42,900 | 45,456 | 321 |
| 34 | Miscellaneous manufacturing | 16,128 | 23,653 | 20,838 | 30,024 | 30,163 | 474 |
| | Total | 299,535 | 373,835 | 438,354 | 418,099 | 454,794 | 2,108 |

For footnotes see page 489.

Electricity and fuels used

VICTORIA—MANUFACTURING ESTABLISHMENTS: VALUE OF
ELECTRICITY AND FUELS USED BY INDUSTRY SUB-DIVISION
(\$'000)

| ASIC code | Industry sub-division | 1969-70 | 1971-72 | 1972-73 | 1973-74 | 1974-75 | |
|--------------|--|---------|---------|---------|---------|---------|-------|
| | | | | | | (g) | (h) |
| 21-2 | Food, beverages, and tobacco | 18,816 | 20,648 | 21,814 | 24,564 | 30,924 | 180 |
| 23 | Textiles | 6,661 | 7,098 | 7,694 | 8,544 | 8,740 | 32 |
| 24 | Clothing and footwear | 3,595 | 4,113 | 4,277 | 4,593 | 4,857 | 66 |
| 25 | Wood, wood products, and furniture | 2,535 | 2,769 | 2,927 | 3,508 | 3,868 | 120 |
| 26 | Paper, paper products, and printing | 8,713 | 10,010 | 10,819 | 11,827 | 13,237 | 104 |
| 27 | Chemical, petroleum, and coal products | 12,458 | 12,804 | 12,908 | 15,310 | 23,817 | 30 |
| 28 | Non-metallic mineral products | 12,170 | 12,489 | 13,284 | 15,117 | 17,065 | 74 |
| 29 | Basic metal products | 13,851 | 12,317 | 13,254 | 15,715 | 19,207 | 28 |
| 31 | Fabricated metal products | 6,477 | 6,763 | 7,083 | 7,842 | 9,328 | 200 |
| 32 | Transport equipment | 8,751 | 10,244 | 10,897 | 11,915 | 14,685 | 46 |
| 33 | Other machinery and equipment | 8,738 | 8,742 | 9,087 | 10,662 | 12,698 | 143 |
| 34 | Miscellaneous manufacturing | 7,206 | 7,929 | 8,623 | 9,584 | 10,978 | 132 |
| | Total | 109,970 | 115,927 | 122,667 | 139,180 | 169,404 | 1,154 |

For footnotes see page 489.

VICTORIA—MANUFACTURING ESTABLISHMENTS:
VALUE OF ELECTRICITY AND FUELS USED
(\$'000)

| Commodity | 1969-70 | 1971-72 | 1972-73 | 1973-74 | 1974-75 | |
|--------------------------------|----------------|----------------|----------------|----------------|----------------|--------------|
| | | | | | (g) | (h) |
| Electricity | 71,891 | 71,173 | 76,026 | 85,853 | 97,813 | 931 |
| Coal and coke— | | | | | | |
| Black coal | 2,130 | 646 | 471 | 67 | 33 | .. |
| Brown coal | 1,515 | 1,647 | 1,207 | 1,634 | 1,318 | .. |
| Brown coal briquettes | 3,466 | 3,354 | 3,500 | 3,265 | 3,522 | 10 |
| Coke (including coke breeze) | 1,329 | 2,011 | 2,316 | 2,685 | 2,904 | 9 |
| Petroleum fuels (non-gaseous)— | | | | | | |
| Light oils, etc. | 1,523 | 1,926 | 2,156 | 2,518 | 3,031 | 74 |
| Industrial diesel fuel | 3,236 | 3,561 | 3,097 | 3,668 | 4,280 | 22 |
| Furnace oil and other fuel oil | 15,524 | 19,162 | 17,336 | 18,205 | 28,850 | 29 |
| Town gas | 4,510 | 7,158 | 11,189 | 15,841 | 20,791 | 40 |
| Other fuels | 4,846 | 5,288 | 5,369 | 5,444 | 6,862 | 38 |
| Total | 109,970 | 115,927 | 122,667 | 139,180 | 169,404 | 1,154 |

For footnotes see page 489.

VICTORIA—MANUFACTURING ESTABLISHMENTS:
QUANTITIES OF FUELS USED

| Commodity | Unit | 1969-70 | 1971-72 | 1972-73 | 1973-74 | 1974-75 | |
|--------------------------------|-------------|---------|-----------|---------|---------|---------|-----|
| | | | | | | (g) | (h) |
| Coal and coke— | | | | | | | |
| Black coal | tonnes | 230,773 | 56,419 | 36,364 | 4,068 | 1,488 | 8 |
| Brown coal | " | 696,750 | 591,609 | 458,882 | 579,080 | 428,822 | 19 |
| Brown coal briquettes | " | 462,525 | 428,943 | 449,614 | 407,861 | 409,127 | 673 |
| Coke (including coke breeze) | " | 49,178 | 52,136 | 60,266 | 59,158 | 53,907 | 225 |
| Petroleum fuels (non-gaseous)— | | | | | | | |
| Light oils, etc. | '000 litres | 35,214 | 38,637 | 42,421 | 43,639 | 32,276 | 683 |
| Industrial diesel fuel | tonnes | 120,609 | 123,496 | 101,686 | 109,829 | 86,865 | 398 |
| Furnace oil and other fuel oil | " | 909,789 | 1,027,569 | 852,450 | 760,282 | 687,691 | 577 |

For footnotes see page 489.

Some principal factory products of Victoria and Australia

Annual quantity and value

The following table shows quantities of some of the principal articles manufactured in Victoria, and corresponding figures for Australia during 1974-75 and 1975-76. Owing to the limited number of producers, it is not permissible under statute to publish particulars regarding some articles of manufacture which would otherwise appear.

From February 1976, production statistics have no longer been collected from single establishment manufacturing enterprises employing less than four persons or from establishments predominantly engaged in non-manufacturing activities but which may carry on in a minor way some manufacturing activity. However, except for a few commodities, the effect of this modification on production levels and movements is marginal.

VICTORIA AND AUSTRALIA—PRINCIPAL ARTICLES MANUFACTURED (a)

| Commodity Code No. | Article | Unit | Victoria | | Australia | |
|-------------------------------|------------------------------------|-------------|----------|---------|-----------|---------|
| | | | 1974-75 | 1975-76 | 1974-75 | 1975-76 |
| 023.18, 20 | Bacon and ham—bone-in —bone-out | '000 tonnes | 3 | 3 | 20 | 16 |
| 19, 21 | | " | 13 | 12 | 34 | 38 |
| 027.02-29 72-77; 023.17 | Meat—canned (excluding baby food) | " | 28 | 27 | 42 | 43 |

VICTORIA AND AUSTRALIA—PRINCIPAL ARTICLES MANUFACTURED (a)—*continued*

| Commodity Code No. | Article | Unit | Victoria | | Australia | |
|--|--|----------------|----------|---------|-----------|---------|
| | | | 1974-75 | 1975-76 | 1974-75 | 1975-76 |
| 051.31 | Butter | " | 119 | 108 | 161 | 148 |
| 051.36-46 | Cheese | " | 45 | 54 | 99 | 112 |
| 051.61 | Ice cream | mill litres | 66 | 74 | 207 | 212 |
| 051.72-73 | Milk—powdered; full cream | '000 tonnes | 33 | 28 | 44 | 41 |
| 062.01, 32 | Flour, plain—wheaten (including sharps) | " | 296 | 290 | 1,214 | 1,192 |
| 063.11, 21, 31 | Malt | " | 230 | 198 | 441 | 389 |
| 064.21 | Biscuits | " | 43 | 48 | 119 | 122 |
| 074.61, 65 | Natural fruit juices | mill litres | 48 | 41 | 135 | 143 |
| 076.08, 15, 22 | Canned or bottled apricots, peaches and pears | " | 87 | 66 | 140 | 104 |
| 076.60 | Jam, etc. | " | 20 | 23 | 30 | 31 |
| 094.02-47 | Vegetables canned or bottled (including pickled) | " | 29 | 28 | 132 | 119 |
| | Confectionery— | | | | | |
| 104.06-18 | Chocolate or containing chocolate | " | 29 | 26 | 64 | 55 |
| 104.21-29 | Other | " | 29 | 28 | 62 | 60 |
| 123.18 | Sauce—tomato | mill litres | 19 | 13 | 25 | 16 |
| 152.06 | Pollard | '000 tonnes | 67 | 58 | 272 | 251 |
| 152.01 | Canned cat and dog food | " | 125 | 142 | 134 | 151 |
| 171.03, 04, 07, 08 | Aerated and carbonated waters, canned or bottled (b) | mill litres | 217 | 243 | 824 | 906 |
| 242.07-11 | Wool—scoured or carbonised | '000 tonnes | 21 | 25 | 52 | 67 |
| 242.33, 35, 70-76 | Wool tops—pure and mixed | " | 4 | 6 | 11 | 17 |
| 246.46-49 | Briquettes—brown coal | " | 1,092 | 946 | 1,092 | 946 |
| 261.41 | Cloth piece goods woven—woollen or predominantly woollen | '000 sq m | 4,972 | 5,206 | 9,741 | 9,754 |
| 372.22-50 | Blankets, bed (c) | '000 | 878 | 1,808 | 1,472 | 2,481 |
| 372.52-66; 374.51-57 | Plastics and synthetic resins | '000 tonnes | 202 | 215 | 366 | 407 |
| 403.02, 18, 20, 52-96; 404.01-98 | Bricks—clay | mill | 442 | 493 | 1,698 | 1,834 |
| 472.01, 03 | Tiles, roofing | " | 61 | 69 | 200 | 218 |
| 472.12, 475.30 | Ready mixed concrete | '000 cub m | 2,555 | 2,852 | 10,194 | 10,324 |
| 475.90 | Electric motors | '000 | 1,127 | 983 | 4,498 | 4,082 |
| 503.13-32 | Finished motor vehicles (d)— | | | | | |
| 581.02-08, 10-16 | Cars | '000 | 194 | 204 | 361 | 369 |
| 582.04-28 | Other | '000 | 35 | 36 | 69 | 64 |
| 773.02-35 | Shirts (men's and boys') Underwear— | '000 doz | 1,026 | 1,482 | 2,272 | 2,848 |
| 773.90, 94, 96, 97; | Men's and boys' | '000 doz | 1,071 | 1,054 | 2,461 | 2,134 |
| 774.01-03, 06, 08, 11, 13, 15, 17, 36-39 | Women's and girls' | '000 doz | 2,223 | 2,507 | 3,475 | 3,647 |
| 774.44, 46, 48, 49, 61, 63, 68-73 | Stockings—women's (e) | '000 doz pairs | 5,553 | 5,119 | 6,763 | 6,316 |
| 775.01-19 | Socks and stockings—men's, children's, and infants' | " | 2,362 | 2,811 | 2,634 | 3,127 |
| 775.51-82, 91-98; 776.01-42 | Footwear—boots, shoes, and sandals (f)— | | | | | |
| 793.05, 08, 21, 22, 31, 32, 41, 46, 51, 65, 66 | Men's and youths' | '000 pairs | 5,867 | 6,013 | 9,872 | 10,321 |
| 793.06, 09, 24, 33, 34, 42, 47, 52, 68 | Women's and maids' | '000 pairs | 7,622 | 8,341 | 11,443 | 13,365 |
| 793.04, 07, 10, 25, 35, 43, 48, 53, 69 | Children's (including infants') | " | 4,436 | 4,552 | 5,759 | 6,331 |
| 832.41 | Footballs—Australian Rules | '000 | 106 | 105 | 150 | 132 |
| 844.22-67 | Mattresses—all types | '000 | 422 | 415 | 1,190 | 1,239 |

(a) By all manufacturing establishments owned by multi-establishment enterprises and single establishment manufacturing enterprises with four or more persons employed.

(b) Includes bulk aerated and carbonated waters.

(c) Double, three quarter, single cot, bassinet, pram, etc.; wool mixture, and other fibre. From 1 July 1975 includes tufted blankets.

(d) Excludes vehicles finished by specialist body building works outside the motor vehicle manufacturers organisation.

(e) Includes panty hose.

(f) Excluding wholly of rubber.

Monthly production statistics

The Australian Bureau of Statistics collects monthly production returns and makes available printed tables of Australian production statistics within a few weeks of the month to which they relate. A list of the subjects included in these production summaries is given in the following table.

In addition, statistical publications for the meat and dairying industries and minerals and mineral products are issued each month. Australian totals for a greater range of commodities are published in these publications and production summaries than are published in the *Monthly Bulletin of Production Statistics*. Victorian figures are published in the Victorian monthly publication *Secondary production*.

AUSTRALIA—PRODUCTION SUMMARIES

| Ref. No. | Subject | Ref. No. | Subject |
|----------|--|----------|--|
| 1 | Automotive Spark Plugs and Shock Absorbers | 28 | Footwear |
| 2 | Chemicals, etc. | 29 | Biscuits, Cocoa, Confectionery, Ice Cream |
| 3 | Plastics and Synthetic Resins and Plasticisers | 30 | Storage Batteries—Wet Cell |
| 4 | Paints and Other Surface Coatings | 32 | Perambulators, Pushers and Strollers |
| 5 | Electricity and Gas | 33 | Motor Vehicles |
| 6 | Soap, Detergents, Glycerine and Fatty Acids | 34 | Television, Radios, Other Sound Equipment; Transistors |
| 7 | Internal Combustion Engines | 35 | Bed Bases and Mattresses |
| 8 | Lawnmowers | 36 | Processed Milk Products |
| 9 | Electrical Appliances | 38 | Fish Preserving |
| 10 | Motor Bodies, Trailed Vehicles, Lift-on Freight Containers, etc. | 39 | Jam, Preserved Fruit and Vegetables |
| 11 | Pedal Cycles | 40 | Cereal Products |
| 12 | Meters | 41 | Vegetable Oils; Margarine and Other Edible Processed Fats |
| 13 | Building Fittings | 42 | Malt and Beer |
| 14 | Cotton Goods | 43 | Stock and Poultry Foods and Canned Pet Food |
| 15 | Fellmongering, Wooll scouring and Carbonising | 45 | Gramophone Records |
| 16 | Wool Top Making and Yarn Produced | 47 | Aerated and Carbonated Waters; Cordials and Syrups |
| 17 | Wool Woven Fabric, etc. | 48 | Sports Goods |
| 18 | Hosiery | 49 | Building Materials |
| 19 | Women's, Maids' and Girls' Clothing and Infants' and Babywear | 50 | Electrodes for Manual Welding |
| 20 | Cellulosic and Synthetic Fibre Tops, Yarns and Woven Fabric | 51 | Hides and Skins Used in Tanneries |
| 21 | Paper, Wood Pulp and Adhesive Tapes | 52 | Electrical Power Frequencies Transformers, Chokes and Ballasts |
| 22 | Floor Coverings and Felts | 53 | Plastics Film, Sheeting and Coated Materials |
| 23 | Electric Motors | 55 | Butter and Non-Processed Cheese |
| 24 | Men's, Youths' and Boys' Clothing | 56 | Canned Meat |
| 25 | Foundation Garments | 58 | Steel Wire and Wire Products |
| 27 | Gloves and Slide Fasteners | 59 | Non-ferrous Rolled, Extruded and Drawn Products |

INDIVIDUAL INDUSTRIES

Introduction

Particulars on pages 506–10 show the principal statistics of the sixteen major groups of industry in Victoria indicated in the Manufacturing Division of the Australian Standard Industrial Classification. These industry groups have been selected on the basis of employment. For a description of each of the groups in the Australian Standard Industrial Classification, see Appendix E of the *Victorian Year Book 1975*. Two sets of figures are shown for 1974–75 relating to (a) all manufacturing establishments owned by multi-establishment enterprises and single establishment manufacturing enterprises with four or more persons employed, and (b) single establishment manufacturing enterprises with less than four persons employed.

Details of industries

Major groups

The following table details particulars of establishments classified to the manufacture of meats and associated by-products :

VICTORIA—ASIC GROUP 211: MEAT PRODUCTS

| Particulars | 1969-70 | 1971-72 | 1972-73 | 1973-74 | 1974-75 | |
|-------------------------------------|----------------|---------|---------|---------|---------|-------|
| | | | | | (a) | (b) |
| Number of establishments at 30 June | 327 | 303 | 288 | 289 | 247 | 40 |
| Average number of persons employed | 16,271 | 18,839 | 18,975 | 17,059 | 16,066 | 82 |
| Salaries and wages paid | \$'000 54,203 | 79,830 | 89,123 | 94,730 | 108,339 | 229 |
| Turnover | \$'000 401,435 | 487,877 | 647,593 | 672,590 | 578,545 | 2,638 |
| Purchases, transfers in | \$'000 313,505 | 367,637 | 496,145 | 503,631 | 397,217 | 1,604 |
| Value added | \$'000 88,292 | 128,187 | 161,581 | 156,516 | 179,509 | 806 |
| Rent and leasing expenses | \$'000 1,924 | 2,589 | 3,378 | 3,063 | 3,776 | 76 |
| Net fixed capital expenditure | \$'000 6,697 | 10,676 | 17,203 | 14,324 | 11,070 | 22 |

(a) All manufacturing establishments owned by multi-establishment enterprises and single establishment manufacturing enterprises with four or more persons employed.

(b) Single establishment manufacturing enterprises with less than four persons employed.

The following table details particulars of establishments classified to the manufacture of milk products :

VICTORIA—ASIC GROUP 212: MILK PRODUCTS

| Particulars | 1969-70 | 1971-72 | 1972-73 | 1973-74 | 1974-75 | |
|-------------------------------------|----------------|---------|---------|---------|---------|-----|
| | | | | | (a) | (b) |
| Number of establishments at 30 June | 152 | 142 | 135 | 122 | 106 | 7 |
| Average number of persons employed | 8,875 | 8,724 | 8,673 | 9,114 | 8,828 | 17 |
| Salaries and wages paid | \$'000 30,989 | 36,048 | 40,657 | 51,859 | 63,730 | 59 |
| Turnover | \$'000 425,377 | 462,488 | 496,978 | 572,633 | 630,403 | 902 |
| Purchases, transfers in | \$'000 346,805 | 383,251 | 411,848 | 471,139 | 510,989 | 715 |
| Value added | \$'000 79,745 | 83,317 | 97,616 | 99,758 | 137,920 | 196 |
| Rent and leasing expenses | \$'000 1,056 | 1,519 | 1,769 | 2,498 | 3,139 | 11 |
| Net fixed capital expenditure | \$'000 8,166 | 9,506 | 11,195 | 16,231 | 19,642 | 5 |

For footnotes see previous table.

Information in the following table relates to establishments manufacturing textile fibres, yarns, and woven fabrics, and household textiles :

VICTORIA—ASIC GROUP 231-232: TEXTILE FIBRES, YARNS,
AND WOVEN FABRICS, AND HOUSEHOLD TEXTILES

| Particulars | 1969-70 | 1971-72 | 1972-73 | 1973-74 | 1974-75 | |
|-------------------------------------|----------------|---------|---------|---------|---------|-----|
| | | | | | (a) | (b) |
| Number of establishments at 30 June | 234 | 234 | 234 | 244 | 195 | 17 |
| Average number of persons employed | 22,322 | 21,681 | 21,471 | 21,885 | 16,228 | 41 |
| Salaries and wages paid | \$'000 65,623 | 75,622 | 85,035 | 106,599 | 102,288 | 151 |
| Turnover | \$'000 299,416 | 309,286 | 352,236 | 417,252 | 345,140 | 639 |
| Purchases, transfers in | \$'000 180,096 | 184,959 | 212,241 | 264,127 | 186,996 | 328 |
| Value added | \$'000 122,565 | 124,950 | 147,270 | 181,051 | 140,184 | 308 |
| Rent and leasing expenses | \$'000 1,350 | 2,015 | 2,467 | 3,723 | 3,287 | 25 |
| Net fixed capital expenditure | \$'000 19,373 | 12,978 | 7,970 | 22,238 | 11,899 | 8 |

For footnotes see table above.

Particulars of establishments classified as knitting mills are shown in the following table :

VICTORIA—ASIC GROUP 241: KNITTING MILLS

| Particulars | 1969-70 | 1971-72 | 1972-73 | 1973-74 | 1974-75 | |
|-------------------------------------|----------------|---------|---------|---------|---------|-------|
| | | | | | (a) | (b) |
| Number of establishments at 30 June | 313 | 315 | 303 | 300 | 243 | 34 |
| Average number of persons employed | 14,417 | 14,286 | 14,666 | 14,816 | 12,164 | 77 |
| Salaries and wages paid | \$'000 39,328 | 44,794 | 52,938 | 64,258 | 66,679 | 279 |
| Turnover | \$'000 172,199 | 193,833 | 210,100 | 246,570 | 230,698 | 1,254 |
| Purchases, transfers in | \$'000 103,212 | 110,442 | 123,100 | 150,145 | 123,587 | 597 |
| Value added | \$'000 70,601 | 83,355 | 93,440 | 105,354 | 101,556 | 629 |
| Rent and leasing expenses | \$'000 1,545 | 1,873 | 2,164 | 2,281 | 2,465 | 55 |
| Net fixed capital expenditure | \$'000 4,393 | 5,799 | 4,822 | 4,495 | 2,680 | 69 |

For footnotes see page 506.

Information in the following tables deals with establishments manufacturing clothing and footwear :

VICTORIA—ASIC GROUP 242: CLOTHING

| Particulars | 1969-70 | 1971-72 | 1972-73 | 1973-74 | 1974-75 | |
|-------------------------------------|----------------|---------|---------|---------|---------|-------|
| | | | | | (a) | (b) |
| Number of establishments at 30 June | 1,123 | 1,112 | 1,116 | 1,140 | 910 | 130 |
| Average number of persons employed | 37,197 | 35,881 | 35,517 | 34,955 | 28,979 | 274 |
| Salaries and wages paid | \$'000 85,195 | 98,202 | 110,409 | 132,184 | 142,397 | 974 |
| Turnover | \$'000 280,097 | 316,883 | 343,786 | 405,547 | 427,277 | 4,588 |
| Purchases, transfers in | \$'000 153,381 | 164,454 | 180,580 | 219,338 | 211,763 | 2,321 |
| Value added | \$'000 130,207 | 152,291 | 166,836 | 202,405 | 207,986 | 1,897 |
| Rent and leasing expenses | \$'000 3,678 | 4,088 | 4,745 | 5,988 | 5,807 | 169 |
| Net fixed capital expenditure | \$'000 4,045 | 4,107 | 3,815 | 6,083 | 3,622 | 25 |

For footnotes see page 506.

VICTORIA—ASIC GROUP 243: FOOTWEAR

| Particulars | 1969-70 | 1971-72 | 1972-73 | 1973-74 | 1974-75 | |
|-------------------------------------|----------------|---------|---------|---------|---------|-----|
| | | | | | (a) | (b) |
| Number of establishments at 30 June | 198 | 179 | 177 | 173 | 130 | 25 |
| Average number of persons employed | 12,644 | 11,605 | 10,713 | 10,325 | 8,052 | 52 |
| Salaries and wages paid | \$'000 32,689 | 33,808 | 37,587 | 43,454 | 43,694 | 70 |
| Turnover | \$'000 112,423 | 125,856 | 127,557 | 147,499 | 140,910 | 789 |
| Purchases, transfers in | \$'000 65,047 | 74,988 | 67,606 | 81,110 | 69,431 | 466 |
| Value added | \$'000 49,541 | 53,782 | 59,867 | 69,664 | 69,305 | 305 |
| Rent and leasing expenses | \$'000 1,290 | 1,256 | 1,682 | 1,695 | 1,686 | 22 |
| Net fixed capital expenditure | \$'000 3,883 | 1,989 | 2,178 | 755 | 1,426 | 27 |

For footnotes see page 506.

Information in the following table deals with establishments manufacturing paper and paper products :

VICTORIA—ASIC GROUP 261: PAPER AND PAPER PRODUCTS

| Particulars | 1969-70 | 1971-72 | 1972-73 | 1973-74 | 1974-75 | |
|-------------------------------------|----------------|---------|---------|---------|---------|-----|
| | | | | | (a) | (b) |
| Number of establishments at 30 June | 106 | 109 | 112 | 117 | 107 | 9 |
| Average number of persons employed | 10,153 | 11,139 | 10,799 | 11,441 | 10,689 | 15 |
| Salaries and wages paid | \$'000 38,650 | 50,019 | 54,956 | 72,709 | 84,400 | 24 |
| Turnover | \$'000 199,959 | 250,261 | 275,683 | 329,548 | 362,847 | 252 |
| Purchases, transfers in | \$'000 122,152 | 149,887 | 160,505 | 193,561 | 231,785 | 95 |
| Value added | \$'000 83,081 | 101,530 | 114,199 | 144,851 | 153,878 | 156 |
| Rent and leasing expenses | \$'000 1,813 | 1,346 | 1,370 | 1,696 | 2,312 | 12 |
| Net fixed capital expenditure | \$'000 10,298 | 26,988 | 28,859 | 21,874 | 36,568 | 4 |

For footnotes see page 506.

Particulars of establishments classified to printing and publishing industries are shown in the following table :

VICTORIA—ASIC GROUP 262: PRINTING AND PUBLISHING

| Particulars | 1969-70 | 1971-72 | 1972-73 | 1973-74 | 1974-75 | |
|-------------------------------------|----------------|---------|---------|---------|---------|--------|
| | | | | | (a) | (b) |
| Number of establishments at 30 June | 1,039 | 1,047 | 1,093 | 1,121 | 773 | 315 |
| Average number of persons employed | 24,208 | 23,727 | 23,677 | 24,029 | 23,498 | 655 |
| Salaries and wages paid | \$'000 84,597 | 96,434 | 107,587 | 127,996 | 160,364 | 2,044 |
| Turnover | \$'000 272,006 | 297,801 | 340,921 | 394,972 | 469,743 | 10,800 |
| Purchases, transfers in | \$'000 127,005 | 130,226 | 147,280 | 177,868 | 206,646 | 5,198 |
| Value added | \$'000 149,386 | 167,815 | 194,361 | 227,198 | 274,405 | 5,755 |
| Rent and leasing expenses | \$'000 3,220 | 4,133 | 4,950 | 5,813 | 7,239 | 418 |
| Net fixed capital expenditure | \$'000 7,541 | 14,782 | 9,304 | 11,409 | 12,885 | 240 |

For footnotes see page 506.

The following table shows particulars of establishments manufacturing chemical and related products :

VICTORIA—ASIC GROUP 272: CHEMICAL AND RELATED PRODUCTS (EXCEPT BASIC CHEMICALS)

| Particulars | 1969-70 | 1971-72 | 1972-73 | 1973-74 | 1974-75 | |
|-------------------------------------|----------------|---------|---------|---------|---------|-------|
| | | | | | (a) | (b) |
| Number of establishments at 30 June | 273 | 268 | 272 | 279 | 194 | 65 |
| Average number of persons employed | 14,371 | 14,567 | 14,402 | 14,667 | 12,979 | 135 |
| Salaries and wages paid | \$'000 50,987 | 60,835 | 67,867 | 80,897 | 94,024 | 489 |
| Turnover | \$'000 221,469 | 248,312 | 270,984 | 327,819 | 373,082 | 2,757 |
| Purchases, transfers in | \$'000 122,948 | 128,349 | 144,226 | 175,765 | 203,257 | 1,684 |
| Value added | \$'000 106,685 | 119,184 | 131,032 | 163,911 | 183,510 | 1,103 |
| Rent and leasing expenses | \$'000 1,516 | 1,962 | 2,362 | 2,967 | 3,280 | 93 |
| Net fixed capital expenditure | \$'000 10,173 | 10,989 | 11,691 | 12,008 | 14,040 | 14 |

For footnotes see page 506.

Particulars of establishments classified to the sheet metal products industry are given in the following table :

VICTORIA—ASIC GROUP 312: SHEET METAL PRODUCTS

| Particulars | 1969-70 | 1971-72 | 1972-73 | 1973-74 | 1974-75 | |
|-------------------------------------|----------------|---------|---------|---------|---------|-------|
| | | | | | (a) | (b) |
| Number of establishments at 30 June | 360 | 352 | 366 | 359 | 265 | 85 |
| Average number of persons employed | 11,671 | 11,086 | 10,910 | 11,245 | 10,418 | 179 |
| Salaries and wages paid | \$'000 40,975 | 42,948 | 49,550 | 59,949 | 69,655 | 554 |
| Turnover | \$'000 166,127 | 179,840 | 187,355 | 228,903 | 257,133 | 3,214 |
| Purchases, transfers in | \$'000 101,220 | 108,920 | 100,074 | 128,608 | 142,524 | 1,674 |
| Value added | \$'000 67,579 | 78,811 | 87,197 | 110,627 | 118,442 | 1,517 |
| Rent and leasing expenses | \$'000 1,344 | 1,649 | 1,974 | 2,209 | 2,915 | 93 |
| Net fixed capital expenditure | \$'000 6,955 | 12,529 | 8,528 | 3,505 | 16,358 | 52 |

For footnotes see page 506.

Particulars of establishments classified to the other fabricated metal products industries are shown in the following table :

VICTORIA—ASIC GROUP 313: OTHER FABRICATED METAL PRODUCTS (EXCEPT MACHINERY AND EQUIPMENT)

| Particulars | 1969-70 | 1971-72 | 1972-73 | 1973-74 | 1974-75 | |
|-------------------------------------|----------------|---------|---------|---------|---------|-------|
| | | | | | (a) | (b) |
| Number of establishments at 30 June | 775 | 758 | 775 | 790 | 553 | 225 |
| Average number of persons employed | 18,611 | 19,703 | 19,993 | 20,115 | 19,849 | 437 |
| Salaries and wages paid | \$'000 63,782 | 78,722 | 88,949 | 105,662 | 136,083 | 1,361 |
| Turnover | \$'000 221,537 | 259,621 | 292,441 | 348,333 | 382,996 | 6,862 |
| Purchases, transfers in | \$'000 114,324 | 126,477 | 140,455 | 176,695 | 186,606 | 3,111 |
| Value added | \$'000 110,671 | 137,794 | 156,476 | 183,047 | 216,032 | 4,068 |
| Rent and leasing expenses | \$'000 2,232 | 2,536 | 2,966 | 3,431 | 3,914 | 257 |
| Net fixed capital expenditure | \$'000 10,175 | 10,365 | 9,604 | 13,144 | 14,140 | 150 |

For footnotes see page 506.

The following table gives details of establishments classified to the manufacture of motor vehicles and parts :

VICTORIA—ASIC GROUP 321: MOTOR VEHICLES AND PARTS
(EXCEPT OTHER TRANSPORT EQUIPMENT)

| Particulars | 1969-70 | 1971-72 | 1972-73 | 1973-74 | 1974-75 | |
|-------------------------------------|----------------|---------|-----------|-----------|-----------|-------|
| | | | | | (a) | (b) |
| Number of establishments at 30 June | 323 | 324 | 334 | 364 | 305 | 73 |
| Average number of persons employed | 38,700 | 42,340 | 43,507 | 47,768 | 45,034 | 140 |
| Salaries and wages paid | \$'000 145,056 | 195,810 | 224,200 | 293,620 | 325,859 | 365 |
| Turnover | \$'000 813,731 | 994,392 | 1,064,935 | 1,187,167 | 1,410,216 | 3,051 |
| Purchases, transfers in | \$'000 520,412 | 641,703 | 692,362 | 783,147 | 961,324 | 1,689 |
| Value added | \$'000 312,917 | 384,773 | 358,998 | 454,676 | 542,587 | 1,395 |
| Rent and leasing expenses | \$'000 2,625 | 3,857 | 4,916 | 4,624 | 5,212 | 77 |
| Net fixed capital expenditure | \$'000 27,333 | 38,929 | 32,226 | 38,341 | 62,365 | 79 |

For footnotes see page 506.

Information in the following table relates to establishments manufacturing other transport equipment :

VICTORIA—ASIC GROUP 322: OTHER TRANSPORT EQUIPMENT

| Particulars | 1969-70 | 1971-72 | 1972-73 | 1973-74 | 1974-75 | |
|-------------------------------------|----------------|---------|---------|---------|---------|-------|
| | | | | | (a) | (b) |
| Number of establishments at 30 June | 115 | 127 | 137 | 143 | 97 | 49 |
| Average number of persons employed | 17,537 | 17,239 | 17,402 | 17,214 | 16,629 | 99 |
| Salaries and wages paid | \$'000 65,998 | 74,785 | 84,124 | 102,395 | 124,091 | 276 |
| Turnover | \$'000 131,709 | 156,453 | 161,923 | 200,061 | 237,780 | 1,435 |
| Purchases, transfers in | \$'000 52,195 | 60,010 | 53,521 | 64,678 | 76,312 | 778 |
| Value added | \$'000 76,566 | 97,093 | 109,688 | 140,891 | 166,217 | 690 |
| Rent and leasing expenses | \$'000 730 | 2,144 | 1,690 | 1,990 | 2,288 | 46 |
| Net fixed capital expenditure | \$'000 19,233 | 19,662 | 23,871 | 23,417 | 29,224 | 10 |

For footnotes see page 506.

Particulars of establishments classified to the household appliances and electrical equipment industries are shown in the following table :

VICTORIA—ASIC GROUP 332: HOUSEHOLD APPLIANCES AND
ELECTRICAL EQUIPMENT

| Particulars | 1969-70 | 1971-72 | 1972-73 | 1973-74 | 1974-75 | |
|-------------------------------------|----------------|---------|---------|---------|---------|-------|
| | | | | | (a) | (b) |
| Number of establishments at 30 June | 417 | 445 | 477 | 489 | 394 | 114 |
| Average number of persons employed | 28,460 | 29,250 | 29,808 | 33,121 | 31,066 | 240 |
| Salaries and wages paid | \$'000 94,201 | 116,340 | 131,513 | 169,710 | 203,441 | 900 |
| Turnover | \$'000 402,818 | 428,861 | 500,879 | 601,106 | 713,351 | 5,188 |
| Purchases, transfers in | \$'000 247,983 | 250,838 | 284,225 | 359,513 | 421,870 | 3,362 |
| Value added | \$'000 166,414 | 184,347 | 219,042 | 280,918 | 336,635 | 2,018 |
| Rent and leasing expenses | \$'000 2,316 | 3,392 | 4,513 | 5,119 | 6,311 | 168 |
| Net fixed capital expenditure | \$'000 13,774 | 20,387 | 18,876 | 21,749 | 18,334 | 103 |

For footnotes see page 506.

The following table gives particulars of establishments manufacturing other machinery and equipment :

VICTORIA—ASIC GROUP 333: OTHER MACHINERY AND EQUIPMENT (c)

| Particulars | 1969-70 | 1971-72 | 1972-73 | 1973-74 | 1974-75 | |
|-------------------------------------|----------------|---------|---------|---------|---------|--------|
| | | | | | (a) | (b) |
| Number of establishments at 30 June | 1,028 | 1,101 | 1,133 | 1,144 | 825 | 300 |
| Average number of persons employed | 32,984 | 31,448 | 31,673 | 32,971 | 32,552 | 584 |
| Salaries and wages paid | \$'000 125,595 | 142,779 | 158,393 | 194,106 | 240,074 | 2,193 |
| Turnover | \$'000 429,328 | 480,862 | 522,875 | 614,345 | 726,237 | 10,496 |
| Purchases, transfers in | \$'000 227,479 | 238,495 | 265,434 | 323,749 | 395,637 | 4,714 |
| Value added | \$'000 216,577 | 234,683 | 256,614 | 319,848 | 379,982 | 5,822 |
| Rent and leasing expenses | \$'000 3,378 | 4,795 | 5,744 | 6,637 | 7,553 | 347 |
| Net fixed capital expenditure | \$'000 16,076 | 13,472 | 13,505 | 16,092 | 22,146 | 196 |

For footnotes (a) and (b) see page 506.

(c) Other than Group 331: Photographic, Professional, and Scientific Equipment, and Group 332: Household Appliances and Electrical Equipment.

Particulars of establishments classified to the plastic and related products industries are shown in the following table :

VICTORIA—ASIC GROUP 343: PLASTIC AND RELATED PRODUCTS

| Particulars | 1969-70 | 1971-72 | 1972-73 | 1973-74 | 1974-75 | |
|-------------------------------------|----------------|---------|---------|---------|---------|-------|
| | | | | | (a) | (b) |
| Number of establishments at 30 June | 282 | 316 | 349 | 393 | 328 | 71 |
| Average number of persons employed | 12,696 | 13,915 | 15,067 | 16,261 | 14,794 | 157 |
| Salaries and wages paid | \$'000 43,838 | 57,679 | 69,282 | 88,914 | 102,335 | 843 |
| Turnover | \$'000 206,516 | 257,556 | 310,256 | 380,973 | 438,502 | 4,080 |
| Purchases, transfers in | \$'000 127,345 | 153,323 | 175,626 | 222,472 | 250,586 | 2,517 |
| Value added | \$'000 84,871 | 108,790 | 137,527 | 176,256 | 201,695 | 1,699 |
| Rent and leasing expenses | \$'000 2,515 | 3,991 | 4,270 | 5,305 | 6,071 | 166 |
| Net fixed capital expenditure | \$'000 9,461 | 14,839 | 13,902 | 21,536 | 20,844 | 315 |

For footnotes see page 506.

Wine industry in Victoria

The grape-bearing vine is not indigenous to Australia. It was brought by Captain Arthur Phillip in the First Fleet in 1788. He had called in at Rio de Janeiro and the Cape of Good Hope on the journey from London to replenish supplies, and in these places he took vine cuttings which he had wrapped in wet soil. He himself planted them a few days after arrival in a spot now part of Sydney's Botanical Gardens. Unaccustomed to salt breezes and sandy soil, they withered and died. However, under Phillip's encouragement and guidance, several of the Colony's earliest pioneers, including Gregory Blaxland and John Macarthur, persisted and, in time, successfully grew vines. It was from them that the wine industry grew, first as a rich man's hobby but later, under Macarthur, as a flourishing industry.

The vine came to the Port Phillip District of New South Wales (as Victoria was called until separation in 1851) from both the parent colony and from Van Diemen's Land (now Tasmania). Edward Henty, the first permanent European settler in this part of the mainland, brought cuttings from his own vineyards outside Launceston, in northern Tasmania, and from Macarthur's Camden Park vineyard near Sydney. These he planted near what is now Portland in the western district of Victoria. Unfortunately, all trace of them has been lost as Henty soon moved from Portland to live in Melbourne.

Records and illustrations of life in Melbourne's formative years show vines growing where the Spencer Street railway yards are now situated, at Jolimont, East Melbourne, South Yarra, Hawthorn, and Caulfield. John Pascoe Fawcner planted vines on what is now the Flemington racecourse.

By 1838 Edward Ryrie, who had overlanded from Sydney, established a cattle station and vineyard in the valleys around Lilydale. Later, as they expanded, they were, with Geelong, Whittlesea, Sunbury, Great Western, Tahbilk, Bendigo, and Rutherglen, the foremost vineyard areas of Victoria.

From the middle of the nineteenth century to its close, Victoria was the leading wine producing State in Australia. With good reason, judging by the volume of its wine exported to Great Britain, it was known as "John Bull's Vineyard." Australian wines, and Victorian wines in particular, took prizes in the competitions of Europe. On more than one occasion, judges refused to accept them as Antipodean wines, claiming them to be French until fully-documented proof was put before them. This enviable situation continued through to the late 1880s and early 1890s until disease struck suddenly and, over the years, most vineyards were devastated.

The damage was caused by the Phylloxera louse which came into the country from France where it had decimated the vineyards after its arrival from America.

The Phylloxera's principal food was the root of the vine and from Geelong (where it was first noticed), it spread in a north-easterly direction, ruining thousands of vines in what had been long established vineyards, many of which were never replanted to the vine. It touched on the fringes of Tahlbilk and Milawa but did its most severe damage around Bendigo and at Rutherglen. Fortunately for the future of the wine industry in general, it did not veer westerly so that Great Western remained untouched, as did the whole of South Australia, which became Australia's leading wine producer but still exercises considerable caution in introducing unfamiliar grape varieties.

However, some Victorian vineyards were revived with Phylloxera-resistant rootlings evolved in America. Yet even now Victoria, although its vineyard areas are expanding steadily, still ranks behind South Australia and New South Wales as a wine-producing State.

Irrigation in Victoria began before Federation. In the mid-1880s the State suffered the severest drought ever recorded as did southern New South Wales and the eastern half of South Australia. To alleviate it, the Victorian Government brought to the State the Chaffey brothers, two Canadians who had worked in California. There they had solved a similar problem with their series of river locks designed to harness water which, until then, was flowing unused into the sea.

They began a similar operation on the Murray River, beginning near Mildura, in north-west Victoria. In time this man-made watering scheme spread upstream through Robinvale, Swan Hill, and the Rutherglen district (and to Corowa in New South Wales), and downstream into South Australia through Renmark, Loxton, and Berri. It was this continuation of water, as well as ample sunshine, which enabled Victoria to expand the production of dried fruits and to regain its place as a wine producing area after the effects of Phylloxera.

From the late 1950s to the present time Victoria has enjoyed an unprecedented growth in wine production and wine consumption, particularly in table wines. Together with this rise of public acceptance of wine has come vineyard expansion on a scale not seen before, even in pre-Phylloxera times. Many of the State's earliest grape-growing areas, for example, Geelong, Lilydale, and Bendigo, are again producing wine, as are new districts such as Drumborg (near Henty's original settlement at Portland), Avoca, central Victoria, and even Melbourne suburbs such as Wantirna.

In recent years mechanical harvesting has come to be more widely accepted among Victorian vignerons and it is likely to prove permanent, especially in the newer districts where vines have been planted at the appropriate distances apart to allow for grape-picking by machine.

One noteworthy event in the wine industry recently occurred in Mildura. Some viticultural scientists evolved four entirely new grape varieties, three of them for winemaking and the fourth for use by the dried fruits industry. They spent ten years cross-breeding various chosen grape varieties until achieving the four new strains which have been named after Aboriginal places near Mildura. The names are Tarango, Goyura, and Tullilah for winemaking, and Carino for dried fruits.

The production of wine in Victoria (including that used for distillation purposes) increased from 14,684 kilolitres in 1945-50 to 54,732 kilolitres in 1974-75.

History of manufacturing, 1961; Motor vehicle industry, 1962; Chemical industry, 1963; Petrochemical industry, 1964; Glass industry, 1965; Agricultural machinery industry, 1966; Aluminium industry, 1967; Automation and technical development in industry, 1967; Textile industry, 1968; Canning of foodstuffs, 1969; Butter, cheese, and processed milk products, 1970; Heavy engineering, 1971; Light engineering, 1972; Secondary industry and the environment, 1974; Concrete pipe industry, 1975; Paper industry, 1976

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- 12.23 Manufacturing establishments—summary of operations by industry class
- 12.26 Manufacturing commodities, principal articles produced
- 12.29 Manufacturing establishments, details of operations by industry class
- 12.30 Electricity and gas establishments : details of operations