

8
Commerce



INTRODUCTION

This chapter covers retail trade, price indexes, and imports and exports. Recent data from the redesigned Retail Census is included, supplemented by information from the monthly retail trade survey. Details of data collections and explanations of indexes and seasonal adjustment are given at the end of the chapter.

RETAIL TRADE

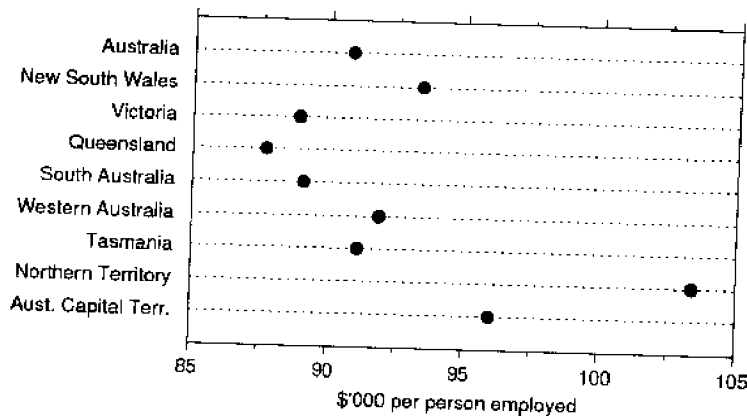
1991-92 Retail Census

At 30 June 1992 there were 44,882 shopfront retailing locations operating in Victoria, about one quarter of the Australian total, which occupied floorspace of 9.3 million square metres. During 1991-92 these locations recorded turnover of \$23.7 billion, which was \$5,338 per head of population, slightly below the Australian average of \$5,463 per head.

There were 266,346 people employed in shopfront retailing locations in Victoria. The turnover per person employed was about \$89,000, slightly below the national average.

In Victoria, \$11.5 billion (49 per cent of the total shop front retailing turnover) was spent in Personal and Household Goods retailing outlets and a further \$10.4 billion (44 per cent) in food retailing stores. The remaining expenditure of \$1.9 billion (7 per cent) was on selected personal services.

SHOPFRONT RETAILING: TURNOVER PER PERSON EMPLOYED BY STATE/TERRITORY, 1991-92



Motor vehicle retailing

At 30 June 1992 there were 9,448 motor vehicle retailing and servicing locations in Victoria. These employed 50,046 people and during 1991-92 recorded turnover of \$9.7 billion, which was an average of \$193,000 per person employed. Again, the rate for Victoria was lower than the Australian average (\$203,000) but higher than South Australia (\$186,000) and the Northern Territory (\$192,000).

TABLE 8.1 RETAILING: VICTORIA, 1991-92

Description	Locations at 30 June no.	Persons employed			Wages and Salaries \$m	Turnover \$m	Turnover/Person employed \$
		Full-time no.	Part-time no.	Total			
Food retailing	14,552	54,326	54,857	109,183	982	10,458	784
Personal and household good retailing	20,896	63,357	48,137	111,494	1,351	11,482	102,979
Selected personal services	9,434	26,925	18,744	45,669	415	1,739	38,078
Total shopfront retailing	44,882	144,608	121,738	266,346	2,748	23,678	88,901
Motor vehicle retailing and services	9,448	42,266	7,780	50,046	833	9,653	192,888

Previous Censuses

Direct comparison of the 1991-92 census with the 1979-80 and 1985-86 censuses is not possible mainly because of the differences in scope and coverage and because a revised industry classification was used in 1991-92. Only a broad summary, as shown in Table 8.2, can be given. This indicates that over the six year period from 1985-86 to 1991-92 the retail industry infrastructure grew significantly with about a 30 per cent increase in the number of establishments, number of persons employed, and turnover, but with a 55 per cent increase in wages and salaries.

TABLE 8.2 RETAIL LOCATIONS: SELECTED COMPARISONS FROM 1979-80 TO 1991-92, VICTORIA

	1979-80 (a)	1985-86	1991-92 (b)
Number of establishments at 30 June	39,621	41,896	54,370
Number of persons employed	209,614	249,477	322,581
Turnover (\$m) (c)	13,155	25,978	33,479
Wages and salaries (\$m) (c)	1,177	2,323	3,615

(a) Excludes single establishment enterprises with turnover less than \$50,000.

(b) Includes Household equipment repair services (ANZSIC 526).

(c) At current prices.

**Monthly Retail
Trade Survey**

In the time between censuses the monthly Retail Trade Surveys are conducted to measure change in the Retail sector at the Australian and State industry level. The monthly series presents estimates of the value of turnover of a sample of retail businesses. Table 8.3 shows aggregated monthly estimates by selected industries from 1986-87 to 1992-93.

TABLE 8.3 TURNOVER OF RETAIL ESTABLISHMENTS (a) AT CURRENT PRICES: BY INDUSTRY, VICTORIA (b)
(\$m)

Industry group	1986-87	1987-88	1988-89	1989-90	1990-91	1991-92	1992-93
Grocers, confectioners, tobacconists	5,366.6	5,583.5	6,142.1	6,674.3	6,979.2	7,335.0	7,538.4
Butchers	495.8	479.9	492.4	537.7	550.0	507.9	504.0
Other food stores	1,109.6	1,291.2	1,410.9	1,473.2	1,408.5	1,589.2	1,608.8
Hotels, liquor stores, licensed clubs	1,994.5	2,206.8	2,200.4	2,204.6	2,138.4	2,044.2	1,913.6
Cafes and restaurants	n.a.	n.a.	969.5	1,228.1	1,120.3	1,070.7	1,169.2
Clothing and fabrics stores	2,051.7	2,179.5	2,092.2	1,749.7	1,715.8	1,675.7	1,647.5
Department and general stores	1,925.7	2,085.2	2,173.0	2,278.6	2,251.3	2,397.6	2,295.2
Footwear stores	274.7	306.5	282.1	270.2	302.2	367.0	393.1
Domestic hardware stores, jewellers	798.6	921.1	934.4	914.2	878.2	904.7	1,014.6
Electrical goods stores	977.1	1,029.0	1,210.1	1,472.9	1,324.7	1,208.7	1,582.8
Furniture stores	561.0	543.3	501.5	472.8	451.3	481.9	442.8
Floor coverings stores	214.7	229.9	221.6	202.9	141.5	179.2	233.8
Pharmacies	528.5	599.3	653.6	722.7	663.5	842.3	1,028.1
Newsagents	677.1	677.9	667.1	806.4	696.2	657.6	613.3
Other	n.a.	n.a.	1,157.6	1,193.4	1,171.2	1,178.1	1,202.4
Total	18,719.5	19,972.2	21,108.3	22,202.2	21,792.3	22,440.7	23,187.6

(a) Excludes establishments which retail motor vehicles, parts, petrol, etc.

(b) Prior to June 1988 these series reflect retail sales adjusted to turnover.

Industry analysis

During 1991-92, estimates of Victorian retail turnover in original terms increased by 2.9 per cent, compared with 1990-91 when turnover decreased by 1.2 per cent. In 1990-91, twelve of the fifteen industries included in the monthly retail trade survey experienced negative growth, whereas during 1991-92 only six of the fifteen industries recorded negative growth, and most industries showed significant improvement in turnover.

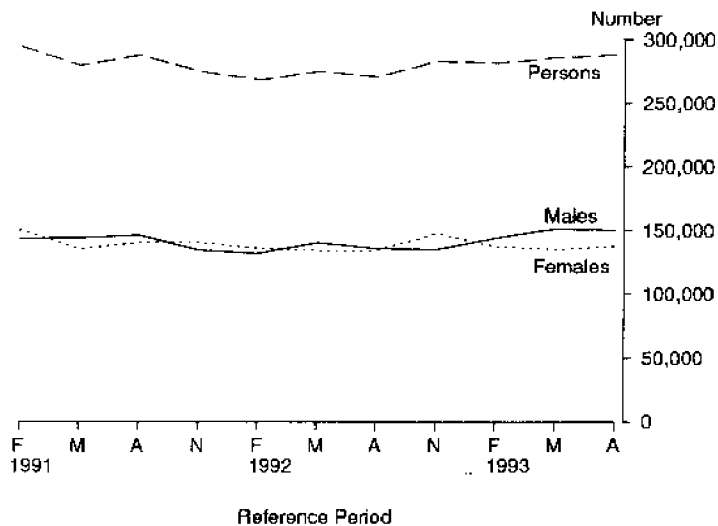
Grocers, confectioners and tobacconists is the largest industry group included in the monthly retail trade survey, accounting for approximately one third of retail turnover. During 1991-92, this group achieved moderate growth of 5 per cent in Victoria. Increases in grocery prices have been restrained by significant competition between the major supermarket chains. Despite this, grocery spending was a strong point in the recovery in retail turnover during 1991-92.

TABLE 8.4 RETAIL TURNOVER: PERCENTAGE CHANGE BY INDUSTRY, VICTORIA

<i>Industry</i>	<i>1989-90 to 1990-91</i>	<i>1990-91 to 1991-92</i>
Floor coverings stores	-30.3	26.6
Newsagents	-13.7	-6.1
Electrical goods stores	-3.9	-8.8
Furniture stores	-4.5	6.8
Other food stores	-4.4	12.8
Domestic hardware stores, jewellers	-3.9	3.0
Hotels, liquor stores, licensed clubs	-3.0	-4.4
Clothing and fabric stores	-1.9	-2.3
Pharmacies	-8.2	26.9
Department and general stores	-1.2	6.5
Butchers	2.8	-7.7
Grocers, confectioners, tobacconists	4.6	5.1
Footwear stores	11.8	21.4
Cafes and restaurants	-3.0	-4.4
Other stores	-1.9	0.6
Total	-1.2	2.9

Retail employment

On the basis of August 1993 Labour Force data, 150,800 males and 138,200 females were employed in the Retail sector, a total of 289,000 persons. This was an overall increase on previous quarters, though the total number of persons employed in the Victorian retail sector fluctuated.

EMPLOYED PERSONS IN RETAIL INDUSTRY, VICTORIA

The Consumer Price Index

In 1992-93, the all groups Consumer Price Index for Melbourne stood at 108.9 (base year 1989-90=100.0). For the second successive year this was the lowest annual increase in the Melbourne CPI since 1962-63. The weighted average of the eight Australian capital cities also experienced only a small increase.

TABLE 8.5 CONSUMER PRICE INDEX, ALL GROUPS, EIGHT CAPITAL CITIES
(Base year: 1989-90 = 100.0)

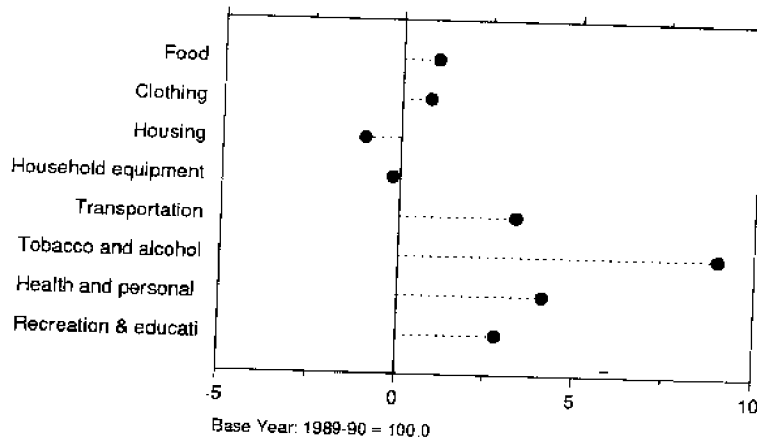
Year	Eight capitals								
	(a)	Sydney	Melbourne	Brisbane	Adelaide	Perth	Hobart	Darwin	Canberra
1987-88	86.3	85.6	86.4	86.9	87.0	85.9	87.9	89.8	87.3
1988-89	92.6	92.5	92.3	93.0	93.3	92.3	93.4	94.2	93.1
1989-90	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
1990-91	105.3	104.9	105.8	104.9	106.2	105.1	104.9	105.7	105.1
1991-92	107.3	106.7	108.1	107.0	108.9	105.9	107.1	108.0	107.8
1992-93	108.4	107.7	108.9	108.5	111.2	106.2	108.5	109.5	109.5

(a) Weighted average of eight capital cities.

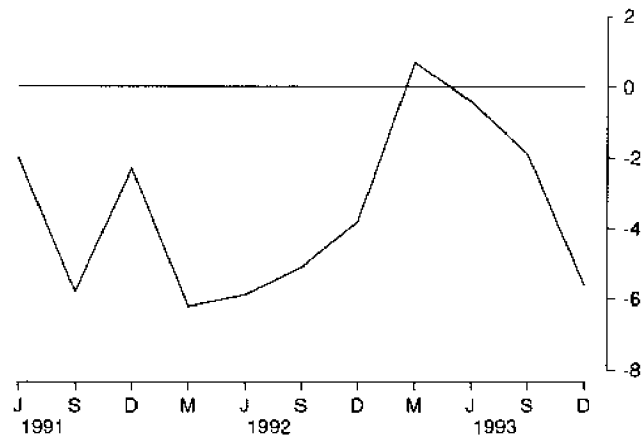
TABLE 8.6 CONSUMER PRICE INDEX, MELBOURNE
(Base year: 1989-90 = 100.0)

Group							Percentage change	
	1987-88	1988-89	1989-90	1990-91	1991-92	1992-93	1987-88 to 1991-92 to	1992-93
							1987-88 to 1992-93	1991-92 to 1992-93
Food	84.6	92.9	100.0	102.5	104.9	106.3	25.7	1.3
Clothing	87.8	94.7	100.0	104.6	106.8	107.8	22.8	0.9
Housing	75.5	86.0	100.0	104.2	98.9	93.1	23.3	-5.9
Household equipment	89.6	93.8	100.0	105.7	108.3	108.3	20.9	0.0
Transport	91.1	93.5	100.0	107.2	109.8	112.7	23.7	2.6
Tobacco and alcohol	87.0	92.3	100.0	111.3	116.8	122.7	41.0	5.1
Health and personal care	86.2	94.0	100.0	111.6	126.3	129.8	50.6	2.8
Recreation and Education	88.6	93.4	100.0	105.9	108.6	110.8	25.1	2.0
All groups	86.4	92.3	100.0	105.8	108.1	108.9	26.0	0.7

CONSUMER PRICE INDEX, PERCENTAGE CHANGE BY GROUP, VICTORIA, JUNE QUARTER 1992 TO JUNE QUARTER 1993



**MORTGAGE INTEREST CHARGES - PERCENTAGE CHANGE FROM PREVIOUS
QUARTER, MELBOURNE**



Imported Items

Since 1989-90 the price of wholly or predominantly imported goods included in the CPI increased by 5 per cent (weighted average of the eight capital cities). By comparison the price of non-imported goods increased by 12 per cent over the same period.

**TABLE 8.7 CONSUMER PRICE INDEX IMPORTED AND NON-IMPORTED ITEMS,
WEIGHTED AVERAGE OF EIGHT CAPITAL CITIES**
(Base year: 1989-90 = 100.0)

	<i>Imported items</i>			<i>Non-imported items</i>			<i>All Groups</i>
	<i>Motor vehicles</i>	<i>Other goods</i>	<i>Total goods</i>	<i>Goods</i>	<i>Services</i>	<i>Total</i>	
1989-90	100.0	100.0	100.0	100.0	100.0	100.0	100.0
1990-91	101.0	101.9	101.7	105.5	105.9	105.7	105.3
1991-92	105.1	102.0	103.1	108.5	106.7	107.9	107.3
1992-93	111.0	103.4	105.1	111.5	105.4	109.0	108.4

Average retail prices

Over the six years to June 1993, prices of staple foods such as milk and bread have steadily increased, though the rate of increase has slowed in recent years, as reflected by the CPI overall. For other foods, such as cheese and butter, there has been a price decrease in the last year.

TABLE 8.8 AVERAGE RETAIL PRICES OF SELECTED FOOD AND OTHER ITEMS, MELBOURNE (cents)

Item	Unit	June quarter					
		1988	1989	1990	1991	1992	1993
Dairy products -							
Milk, carton, supermarket sales	1 litre	80	82	85	91	96	101
Cheese, processed, sliced, wrapped	500g	246	286	315	311	329	302
Butter	500g	193	209	209	194	182	178
Cereal products -							
Bread, white loaf, sliced, supermarket sales	680g	111	127	137	155	159	160
Flour, self-raising	2kg	235	239	284	282	302	303
Rice, medium grain	1kg	96	92	103	107	111	109
Meat and Seafoods -							
Beef-							
Rump steak	1kg	950	1,080	1,153	1,171	1,124	1,057
Chuck steak	1kg	515	598	619	631	633	586
Lamb-							
Leg	1kg	479	506	545	515	512	554
Loin chops	1kg	630	709	780	765	746	783
Chicken, frozen	1kg	303	326	312	309	328	291
Bacon, middle rashers	250g pkt	240	273	289	265	284	287
Salmon, pink	210gm can	262	343	279	270	234	261
Fruit and vegetables -							
Potatoes	1kg	77	110	99	85	82	95
Onions	1kg	99	101	109	79	66	127
Peaches, canned	825g	153	160	185	183	190	197
Oranges	1kg	119	172	122	130	135	114
Other food -							
Eggs	55g dozen	174	192	178	180	178	190
Sugar, white	2kg	160	174	217	189	174	171
Jam, strawberry	500g jar	182	193	212	230	224	226
Tea	250g	146	145	164	172	167	171
Coffee, instant	150g jar	495	474	454	431	425	402
Margarine, poly-unsaturated	500g	120	139	144	156	160	153
Other items -							
Beer, full strength, unchilled	12x750ml bottles	1,897	1,816	1,936	2,144	2,252	2,280
Pet food	415g	78	79	84	80	87	92
Laundry detergent	1kg	372	398	439	437	442	439
Toilet soap	2 x 125 gm	134	132	150	151	152	156
Petrol, super grade	1 litre	52.3	55.2	61.7	65.1	67.2	66.5

Materials used in house building

The All Groups index number for the Price Index of Materials Used in Housing Building for Melbourne in 1992-93 was 141.1, a one per cent increase on 1991-92. The weighted average of the six state capital cities increased by 2.0 per cent for the same period.

The prices of most of the major materials used in house building in Melbourne increased during 1992-93; the biggest increases were in ready mixed concrete and hardwood.

PRICE INDEX OF MATERIALS USED IN HOUSE BUILDING, ALL GROUPS, MELBOURNE AND WEIGHTED AVERAGE OF SIX STATE CAPITAL CITIES (Percentage change from previous month)

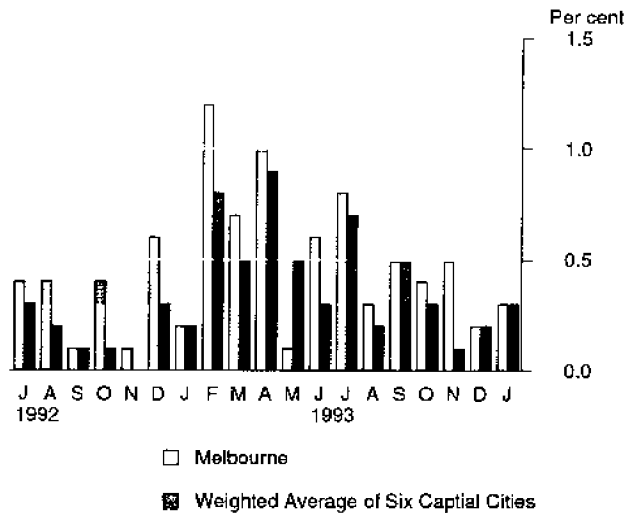


TABLE 8.9 PRICE INDEX OF MATERIALS USED IN HOUSE BUILDING, MELBOURNE
(Base year: 1985-86 = 100.0)

<i>Selected major materials</i>	<i>1987-88</i>	<i>1988-89</i>	<i>1989-90</i>	<i>1990-91</i>	<i>1991-92</i>	<i>1992-93p</i>
Ready mixed concrete	104.8	116.3	121.1	133.7	117.1	133.3
Clay bricks	115.4	122.7	130.9	136.0	140.2	142.3
Concrete roof tiles	110.1	119.3	130.8	137.8	140.0	139.7
Hardwood	103.0	119.4	120.4	117.8	115.1	123.9
Softwood	106.2	118.9	124.8	123.0	117.3	124.5
Aluminium windows and doors	117.1	134.5	142.5	146.5	146.9	148.4
Builders' hardware	115.0	126.0	131.9	136.9	140.9	144.7
Paint	115.5	125.1	143.4	158.4	170.0	168.8
Metal sheet fascia and guttering	115.2	129.2	144.7	154.6	157.7	156.8
Plaster and plaster products	116.5	126.5	133.3	142.4	147.7	150.0
All groups, Melbourne	114.3	125.8	133.5	138.1	137.3	141.1
All groups, weighted average of six State capital cities	113.8	126.1	135.8	142.1	142.4	145.2

Materials used in building other than house building

As part of its continuing program of price index improvements, the ABS has concluded a major review of the Price Index of Materials Used in Building Other than House Building. The new series was first published in respect of October 1993 with index numbers available for each month from July 1989.

A new weighting pattern has been developed based on the estimated average usage of materials in a sample of representative building types over the five years ending June 1992. A number of new items have been included, for example communication and security equipment, and some infrequently used items such as earthenware pipes have been deleted. Coverage for some of the existing items has been altered to reflect modern building practice and items have been classified, as far as practicable, according to the Australian and New Zealand Standard Industrial Classification (ANZSIC).

A revised base year of 1989-90=100.0 has been introduced and link factors are available for converting index numbers for periods prior to July 1989.

More comprehensive details of the review and the revised series are contained in *Price Index of Materials Used in Building Other than House Building, Six State Capital Cities and Canberra, October 1993* (Catalogue No. 6407.0).

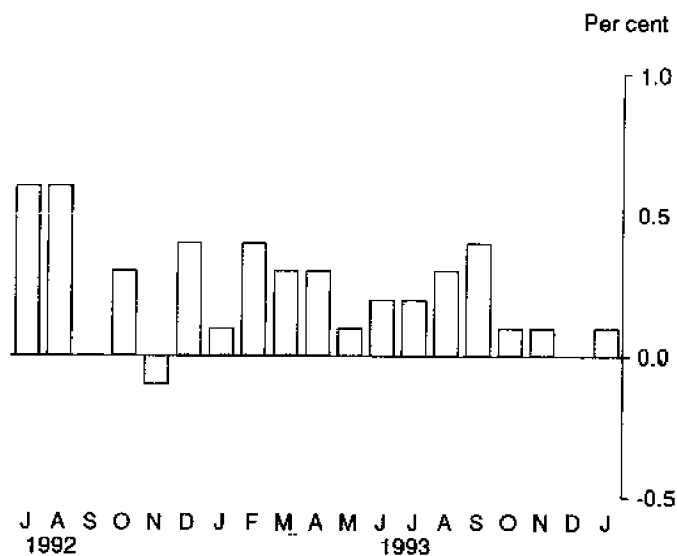
In 1992-93, the All Groups index number for the Price Index of Materials Used in Building Other than House Building, Melbourne was 104.4, a 1 per cent increase over 1991-92. For the weighted average of six State Capital Cities, the increase recorded was 0.3 per cent.

Prices for several materials used in building other than house building decreased in 1992-93 compared with 1991-92. The largest decreases in Melbourne occurred in sand, aggregate and filling precast concrete products, structural steel, and carpet. These price reductions were largely offset by increases in ready mixed concrete, structural timber and builders' hardware.

TABLE 8.10 PRICE INDEX OF MATERIALS USED IN BUILDING OTHER THAN HOUSE BUILDING, MELBOURNE
(Base year: 1989-90 = 100.0)

<i>Selected major materials</i>	1987-88	1988-89	1989-90	1990-91	1991-92	1992-93
Structural timber	84.2	97.3	100.0	100.1	97.2	103.2
Clay bricks	88.3	93.8	100.0	103.8	106.9	108.5
Ready mixed concrete	86.9	95.8	100.0	107.4	94.0	108.2
Precast concrete products	84.7	50.6	100.0	103.7	102.8	99.5
Steel decking, and cladding	79.7	89.8	100.0	104.0	107.5	109.0
Structural steel	83.4	92.7	100.0	98.8	93.3	91.3
Reinforcing steel bar, mesh, etc.	85.5	93.1	100.0	106.7	97.3	99.2
Aluminium windows	82.7	89.4	100.0	99.5	96.4	96.0
Fabricated steel products	77.3	89.8	100.0	106.9	109.5	108.4
Builders' hardware	86.0	94.6	100.0	105.2	112.6	117.2
Sand, and aggregate	88.1	93.4	100.0	115.5	119.0	113.8
Carpet	91.8	97.8	100.0	102.0	100.4	98.8
Paint and other coatings	81.9	88.4	100.0	111.0	119.2	118.8
Non-ferrous pipes and fittings	83.3	98.5	100.0	99.4	89.4	90.9
All groups excluding electrical materials and mechanical services	84.5	92.9	100.0	104.3	101.8	103.4
All electrical materials	80.9	92.7	100.0	107.4	110.7	108.9
All mechanical services	87.2	93.1	100.0	103.6	105.6	105.5
All plumbing materials	82.8	92.3	100.0	105.0	104.1	104.0
All groups	84.5	92.9	100.0	104.5	103.4	104.4
All groups, weighted average of six State capital cities	84.9	92.7	100.0	105.1	105.7	106.0

PRICE INDEX OF MATERIALS USED IN BUILDING OTHER THAN HOUSE BUILDING - ALL GROUPS, MELBOURNE
(Percentage change from previous month)



Figures for October 1993 onwards are preliminary only

House Price Indexes

In 1992-93 the Price Index for Established Houses for Melbourne decreased by 1.8%, the third consecutive year for which a decrease has been recorded. The cumulative decrease from 1989-90 is 6.9 per cent. Melbourne was the only capital city to experience a decrease in the price of established houses in 1992-93.

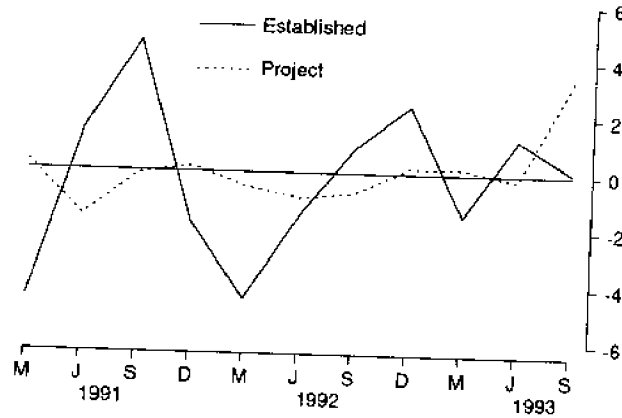
The Project Home Price Index for Melbourne fell by 1.4 per cent from 1991-92 to 1992-93 and by 2.7 per cent from 1990-91 to 1992-93. Again, Melbourne was the only capital city to experience a decrease in the price of project homes during 1992-93.

TABLE 8.11 HOUSE PRICE INDEXES: EIGHT CAPITAL CITIES AND AUSTRALIA (a)
(Base of each index: 1989-90 = 100.0)

	Established houses			Project homes		
	1990-91	1991-92	1992-93	1990-91	1991-92	1992-3
Melbourne	95.2	94.8	93.1	103.2	101.8	100.4
Sydney	100.5	104.9	105.3	102.9	103.1	103.6
Brisbane	114.3	128.2	134.9	104.3	105.2	108.8
Adelaide	106.2	106.5	110.1	104.5	105.4	105.4
Perth	94.8	94.1	98.4	91.9	90.6	92.8
Hobart	106.3	112.0	116.6	106.4	110.1	114.1
Darwin	109.3	115.5	133.6	105.3	107.8	111.4
Canberra	107.3	124.4	134.2	110.6	123.7	131.8
Australia (a)	100.8	104.6	106.0	102.1	102.1	103.0

(a) Weighted average of eight capital cities.

HOUSE PRICE INDEXES, ESTABLISHED HOUSE AND PROJECT HOME PRICE INDEXES, MELBOURNE



EXTERNAL TRADE

Exports

Both imports to and exports from Victoria increased in 1992-93 from 1991-92, continuing the trend of the previous couple of years. The top ten countries for imports and exports in 1992-93 are highlighted in Table 8.14.

TABLE 8.12 OVERSEAS TRADE: RECORDED VALUES OF IMPORTS INTO, AND EXPORTS FROM, VICTORIA
(\$m)

Year	Imports	Exports	Excess of imports
1987-88	14,015	9,051	4,964
1988-89r	15,951	8,576	7,375
1989-90r	16,790	8,581	8,209
1990-91r	14,907	8,846	6,061
1991-92	15,372	9,531	5,841
1992-93	18,162	11,037	7,125

In 1991-92, the significant importers of exports of Victorian origin were Japan, the United States of America and New Zealand. The major commodities exported from Victoria were textile fibres and their wastes, non-ferrous metals, dairy products and birds' eggs, and meat and meat preparations.

Imports

In 1991-92 the significant exporters of commodities into Victoria were the United States of America, Japan and Germany. The major commodities exported into Victoria were road vehicles, including air cushion vehicles, textile yarns, fabrics, made-up articles and related products, and general industrial machinery, equipment and machine parts.

TABLE 8.13 OVERSEAS IMPORTS AND EXPORTS, COUNTRIES OF ORIGIN AND CONSIGNMENT, VICTORIA
(\$m)

Description	Imports			Exports		
	1990-91	1991-92	1992-93	1990-91	1991-92	1992-93
Bangladesh	11	11	10	20	27	36
Belgium-Luxembourg	133	128	166	41	77	53
Brazil	128	132	121	4	10	23
Canada	239	246	266	94	96	147
China -						
Excluding Taiwan Province	661	889	1,171	192	249	539
Taiwan Province only	646	713	765	400	517	514
Czechoslovakia and Slovak						
Federal Republic	13	13	8	7	6	3
Denmark	76	89	105	5	5	6
Egypt, Arab Republic of	1	1	2	57	58	45
Fiji	18	17	25	108	102	128
Finland	119	133	160	5	7	6
France	453	341	383	151	166	180
French Polynesia	-	-	-	18	19	32
Germany	1,326	1,199	1,448	284	297	254

TABLE 8.13 OVERSEAS IMPORTS AND EXPORTS, COUNTRIES OF ORIGIN AND CONSIGNMENT, VICTORIA - continued
(\$m)

Description	Imports			Exports		
	1990-91	1991-92	1992-93	1990-91	1991-92	1992-93
Greece	19	19	18	9	16	13
Hong Kong	256	270	264	346	501	577
India	99	116	150	84	83	77
Indonesia	113	156	233	167	164	199
Iran	5	3	4	93	31	46
Iraq	-	-	-	3	-	-
Ireland	30	31	50	3	3	5
Israeli	40	43	59	5	11	12
Italy	437	414	501	202	191	170
Japan	2,679	2,882	3,315	1,561	1,698	1,629
Korea, Republic of	500	413	465	574	558	689
Kuwait	12	-	-	3	21	25
Macau	24	13	9	2	7	6
Malaysia	179	207	284	247	264	346
Mauritius	2	1	1	16	23	25
Mexico	35	41	49	16	26	39
Nauru, Republic of	7	7	10	16	15	24
Netherlands	168	152	173	29	47	45
New Caledonia	-	-	-	18	50	43
New Zealand	724	765	869	725	825	951
Norway	61	31	37	7	6	7
Pakistan	46	57	88	38	31	73
Papua New Guinea	24	24	28	143	189	197
Philippines	43	42	46	199	182	235
Poland	17	15	12	9	1	6
Portugal	26	26	26	8	6	9
Samoa (American)	-	-	-	20	12	11
Saudi Arabia	89	74	147	81	87	113
Singapore	376	318	370	517	802	1,188
Solomon Islands	-	-	1	7	12	7
South Africa	21	24	42	38	58	92
Spain	68	62	76	29	39	71
Sri Lanka	10	12	13	12	15	29
Sweden	257	254	318	21	20	30
Switzerland	192	191	223	27	27	13
Thailand	169	203	223	238	233	321
Turkey	13	17	16	12	14	35
USSR	6	4	1	89	55	7
United Arab Emirates	-	-	14	40	51	52
United Kingdom	1,042	1,006	1,050	280	310	334
United States of America	3,115	3,306	3,974	1,186	947	934
Yemen Arab Republic	-	-	-	17	7	12
Yugoslavia	18	11	-	9	9	-
Other and unknown	159	250	374	272	247	373
Total	14,907	15,372	18,163	8,804	9,531	11,036

TABLE 8.14 CLASSIFICATION OF OVERSEAS IMPORTS AND EXPORTS, VICTORIA
(\$m)

SITC number	Description	Imports			Exports		
		1990-91	1991-92	1992-93	1990-91	1991-92	1992-93
00	Live animals chiefly for food	31	20	14	27	34	26
01	Meat and meat preparations	19	18	12	520	547	550
02	Dairy products and birds' eggs	55	56	68	652	689	929
03	Fish, crustaceans, and molluscs	116	121	127	84	86	120
04	Cereals and cereal preparations	39	39	46	340	166	344
05	Vegetables and fruit	133	175	156	284	334	440
06	Sugar, sugar preparations, and honey	25	26	31	9	16	14
07	Coffee, tea, cocoa, spices, and manufactures thereof	116	119	137	63	69	69
08	Feeding stuff for animals (not including unmilled cereals)	16	19	17	79	92	122
09	Miscellaneous edible products and preparations	42	52	94	23	27	31
11	Beverages	72	77	80	29	34	47
12	Tobacco and tobacco manufactures	31	35	43	3	4	5
21	Hides, skins, and fur skins (raw)	7	3	4	168	147	147
22	Oil seeds and oleaginous fruit	15	26	23	3	6	10
23	Crude rubber (including synthetic and reclaimed)	50	54	67	8	8	10
24	Cork and wood	125	123	156	2	4	18
25	Pulp and waste paper	49	54	60	12	2	2
26	Textile fibres and their wastes	76	83	86	944	1,146	1,084
27	Crude fertilisers and crude minerals (excluding coal, petroleum, and precious stones)	31	33	45	6	7	7
28	Metalliferous ores and metal scrap	6	4	5	41	36	25
29	Crude animal and vegetable materials, n.e.s.	36	45	48	51	61	61
32	Coal, coke, and briquettes	1	1	2	3	7	10
33	Petroleum, petroleum products, and related materials	263	185	402	518	473	779
34	Gas, natural and manufactured	-	-	-	-	-	-
41	Animal oils and fats	1	1	1	6	8	28
42	Fixed vegetable oils and fats	42	50	61	1	-	1
43	Animal and vegetable oils and fats, processed and waxes of animal or vegetable origin	6	6	8	1	1	26
51	Organic chemicals	273	317	416	8	14	40
52	Inorganic chemicals	80	93	83	20	21	25
53	Dyeing, tanning, and colouring materials	127	125	173	32	26	33
54	Medicinal and pharmaceutical products	204	236	256	110	160	187
55	Essential oils and perfume materials; toilet, polishing, and cleansing preparations	68	86	99	25	23	31
56	Fertilisers manufactured	56	63	93	-	-	-
57	Explosives and pyrotechnic products	251	242	273	69	104	113
58	Artificial resins and plastic materials, cellulose esters and ethers	168	178	212	32	34	40
59	Chemical materials and products, n.e.s.	211	234	243	47	52	118
61	Leather, leather manufactures, n.e.s., and dressed fur skins	64	64	67	49	63	74

**TABLE 8.14 CLASSIFICATION OF OVERSEAS IMPORTS AND EXPORTS,
VICTORIA - continued**
(\$m)

SITC number	Description	Imports			Exports		
		1990-91	1991-92	1992-93	1990-91	1991-92	1992-93
62	Rubber manufactures, n.e.s.	198	216	249	32	41	59
63	Cork and wood manufactures (excluding furniture)	60	68	66	5	4	6
64	Paper, paperboard, and articles of paper pulp, of paper, or of paperboard	427	497	520	67	75	115
65	Textile yarn, fabrics, made-up articles, n.e.s., and related products	921	1,015	1,074	84	99	136
66	Non-metallic mineral manufactures, n.e.s.	261	240	273	49	60	61
67	Iron and steel	263	266	293	269	252	249
68	Non-ferrous metals	108	112	157	941	782	933
69	Manufactures of metal n.e.s.	448	470	562	120	140	138
71	Power generating machinery and equipment	527	546	638	223	305	291
72	Machinery specialised for particular industries	713	574	708	81	76	106
73	Metalworking machinery	135	110	111	23	25	37
74	General industrial machinery and equipment, n.e.s. and machine parts n.e.s.	990	996	1,240	134	146	219
75	Office machines and automatic data processing equipment	483	574	656	31	47	40
76	Telecommunications and sound recording and reproducing apparatus and equipment	520	556	696	132	110	120
77	Electrical machinery, apparatus, and appliances n.e.s., and electrical parts thereof	892	935	1,157	116	165	207
78	Road vehicles (including air cushion vehicles)	1,400	1,495	1,887	549	417	376
79	Other transport equipment	657	365	401	81	97	135
81	Sanitary, plumbing, heating, and lighting fixtures and fittings n.e.s.	51	56	66	7	4	6
82	Furniture and parts thereof	93	101	110	8	8	16
83	Travel goods, handbags, and similar containers	68	76	82	1	1	1
84	Articles of apparel and clothing accessories	528	570	687	48	61	77
85	Footwear	218	235	294	11	11	13
87	Professional, scientific and controlling instruments, and apparatus n.e.s.	445	450	548	119	113	67
88	Photographic apparatus, equipment and supplies and optical goods n.e.s.; watches and clocks	289	323	370	147	163	225
89	Miscellaneous manufactured articles n.e.s.	828	972	1,082	116	152	174
9A	Commodities and transactions of merchandise trade n.e.c.	482	469	537	1,624	1,675	1,663
Total		14,907	15,372	18,162	8,804	9,531	11,037

SERVICE INDUSTRIES

The ABS has recently recommenced its series of service industry surveys.

Hospitality Related Industries

Result from the third Service Industry Survey are about to be published. This survey covers the following hospitality-related industries in respect of the 1991-92 financial year:

- . Accommodation
- . Cafes and Restaurants
- . Pubs, Bars and Taverns
- . Amusement and Theme Parks
- . Casinos
- . Licensed Clubs
- . Motor Vehicle Hire

Professional and Business Service Industries

The fourth Service Industry Survey is currently at the development stage and will cover the following professional and business services-related industries:

- . Real Estate Agents
- . Architectural Services
- . Market Research Services
- . Business Management Services
- . Consultant Engineering Services
- . Commercial Art & Display Services
- . Legal Services
- . Computer Services
- . Accounting Services
- . Technical Services
- . Advertising Services
- . Surveying Services

The survey seeks detailed financial information related to the activities of selected businesses and is being conducted with respect to the 1992-93 financial year. Results of the survey are expect in December 1994.

REFERENCES

Retail trade statistics are collected by the ABS through periodical censuses and regular sample surveys.

RETAIL TRADE**1991-92 Retail Census**

The 1991-92 retail census was the tenth census of the retail industry since 1948. The strategy adopted for the 1991-92 collection was different from recent censuses in that the data were collected through two independent surveys:

- (i) a census of locations or shops, known as the Retail and services Census, where a limited range of data was collected from every in-scope retail location in Australia. The location census was designed primarily to provide small area data.
- (ii) a sample survey of retail businesses, known as the Retail Activity Survey, which provided estimates relating to business structure and performance as well as commodity sales information.

The scope of the census included all shopfront locations operating at 30 June 1992 and classified to Division G (Retail Trade) of the 1993 edition of the Australian and New Zealand Standard Industrial Classification (ANZSIC). Also a range of services (classified to other Divisions of ANZSIC) which predominantly operate from shopfront locations were included because of their association with retailing activity. These outlets have been grouped under the heading "Selected Personal Services" and include:

ANZSIC Class 5730 - Cafes and Restaurants
 8632 - Optometry and Optical Dispensing
 9511 - Video Hire Outlets
 9521 - Laundries and Dry-cleaners
 9522 - Photographic Film Processing
 9526 - Hairdressing and Beauty Salons.

In previous retail censuses, units have been classified in accordance with the principles and methods described in the 1983 edition of the Australian Standard Industrial Classification (ASIC), Catalogue No. 1201.0. In this retail and services census, retail locations have been classified in accordance with the Australian and New Zealand Standard Industrial Classification, Catalogue No. 1292.0.

PRICE INDEXES

Price Indexes are designed to measure the changes in prices over time of a constant list of goods and/or services. The items on this list are allocated 'weights' which represent their relative consumer importance. From time to time indexes are reviewed and new fixed weights are introduced to reflect up-to-date expenditure patterns.

Prices of all goods and services are sought to be measured at constant quality, thus identifying 'pure' price movement. To do this, identical or equivalent items are priced in successive time periods as far as possible. However, products do change; their components or ingredients may change, resulting in an improvement or degradation in quality. Changes in quality are taken into account to ensure that the price indexes reflect only pure price change.

Because it would be impossible to conduct a continuous census to obtain prices for every item, a representative sample of items is priced. Prices for items not collected are assumed to move in a similar way to those items for which prices are collected. Suppliers of the prices included as part of the sample are assumed to have similar pricing policies (and the prices of their goods and services would be expected to move in the same way) as suppliers of prices not in the sample (although actual price levels may be different). Price indexes measure price movements, not actual price levels.

Percentage changes are calculated to illustrate three different kinds of movements in index numbers:

- movements between consecutive financial years (where the index numbers for financial years are simple averages of the quarterly index numbers)
- movements between corresponding quarters of consecutive years, and
- movements between consecutive quarters.

Percentage changes in index numbers

The Consumer Price Index

The Consumer Price Index is sometimes referred to as a measure of inflation, a measure of changes in purchasing power or a measure of changes in the cost of living. It is in fact, 'a measure of change, over time, in the retail prices of a constant basket of goods and services'. The basket represents the purchases made by metropolitan employee households in the base period. Employee households are defined as those which obtain at least three-quarters of their total income from wages and salaries, excluding the top 10 per cent (in terms of income) of such households. Pensioner households are excluded.

As well as giving the information needed to select items to be included in the CPI, Household Expenditure Survey figures also show the relative importance of each item to the total spending on all items. The weighting pattern for the Consumer Price Index as at September quarter 1992 (Twelfth Series) is as follows:

<i>Percentage contribution to the All Groups CPI</i>		
<i>Group</i>	<i>11th series</i>	<i>12th series</i>
Food	18.586	18.324
Clothing	6.664	6.264
Housing	14.083	15.900
Household equipment and operation	17.738	18.370
Transportation	16.794	15.967
Tobacco and alcohol	8.901	7.475
Health and personal care	6.581	6.850
Recreation and education	10.653	10.850
Total All Groups	100.000	100.000

Review of the CPI

Reviews of the CPI are conducted approximately every five years with timing linked to the availability of output from the Household Expenditure Survey (HES). Within this cycle, every second review is a major review, with a minor review in between. Major reviews provide an opportunity to reassess all aspects of the CPI while minor reviews are generally restricted to updating weights.

The current 12th series review was a minor review with three main objectives:

- . to derive updated weights based on the 1988-89 HES
- . to re-reference the index to a 1989-90 reference base, and
- . to review the treatment of home ownership costs.

The CPI was re-referenced to a 1989-90 reference base for the December quarter 1992. The CPI was re-weighted for the September quarter 1992 (12th Series), with a link to the June quarter 1992 (11th Series). A Household Expenditure Survey is being conducted in respect of 1993-94 and will contribute to the development of the 13th series.

Average retail prices

Average retail prices of selected items are collected in each capital city for inclusion in the Consumer Price Index. The prices are the averages of prices for specified grades, qualities, brands etc. charged by a number of selected retailers in each metropolitan area. The specified brands etc. and the retailers are selected as representative to measure price change over time. The prices should be regarded as no more than approximate indicators of price levels and price movements, and not the actual averages of all retail sales of these items.

Producer price indexes

During the 1960s, the ABS began producing a range of price indexes covering materials used and articles produced by defined sectors of the Australian economy. The following producer price indexes (previously known as Wholesale Prices Indexes) are now published monthly: Price Index of Materials Used in House Building; Price Index of Materials Used in Building Other Than House Building; Price Indexes of Materials Used in Manufacturing Industries; Price Indexes of Articles Produced by Manufacturing Industry; Price Indexes of Copper Materials; Import Price Index; Export Price Index; and Price Indexes of Materials Used in Coal Mining. Only the Building Indexes are produced on a State basis, while the remaining Indexes are produced on a national basis.

Producer Price Indexes were formerly described as Wholesale Price Indexes. Index numbers for each month, together with more detailed information concerning the methods used in compiling these indexes, are shown in the bulletins published for each index. For further information refer to the Victorian Year Book 1986, pages 331-7.

Materials Used in House Building

The Materials Used in House Building Index measures changes in prices of selected materials used in the construction of houses in each capital city Statistical Division. A house is defined as a detached building predominantly used for long term residential purposes and consisting of only one dwelling unit. The index does not purport to represent buildings of any kind other than detached houses.

Materials Used in Building Other than House Building

This index measures changes in prices of selected materials used in the construction of buildings (other than houses) in the Melbourne metropolitan area. The building types directly represented in the index include flats, hotels and motels, shops, factories, offices, schools etc.

The index relates to all materials, fittings and fixtures which form an integral part of the structures of buildings other than houses and which are customarily installed before the buildings are occupied.

House Price Indexes

These indexes provide estimates of changes in housing prices for the eight capital cities. *They measure price movements over time in each city. They do not measure differences in price levels between cities.*

Established houses are defined as detached residential dwellings on their own block of land regardless of age. Price changes therefore relate to changes in the total price of dwellings and land. Project homes are dwellings available for construction on a client's block of land. Price changes therefore relate only to the price of the dwelling (excluding land).

**OVERSEAS
TRADE**

Overseas trade statistics are compiled by the ABS from documentation submitted by exporters or importers, or their agents, to the Australian Customs Service, as required by the Customs Act.

The statistics presented in this chapter are recorded on a *general trade basis*, i.e. total exports include both Australian produce and re-exports, and total imports comprise goods entered directly for domestic consumption, together with goods imported into customs warehouses.

State statistics for exports comprise State of origin or State of final shipment. 'State of origin' is defined as the State in which the final stage of production or manufacture occurs. For imports, the State is that in which the import entry was lodged with the Australian Customs Service.

ABS publications

- Balance of Payments, Australia* (5301.0)
- Foreign Trade, Australia, Part 2: Comparative and Summary Tables* (5410.0)
- Exports and Imports, Australia: Trade with Selected Countries and Major Country Groups* (5422.0)
- Exports of Major Commodities and Their Principal Markets, Australia* (5423.0)
- Exports, Australia: Annual Summary Tables* (5424.0)
- Imports, Australia: Annual Summary Tables* (5426.0)
- Exports, Australia, Monthly Summary Tables* (5432.0)
- Imports, Australia, Monthly Summary Tables* (5433.0)
- Exports, Australia* (5434.0)
- Imports, Australia* (5435.0)
- Foreign Trade, Australia, Exports* (5436.0)
- Foreign Trade, Australia, Imports* (5437.0)
- Consumer Price Index* (6401.0)
- Average Retail Prices of Selected Items, Eight Capital Cities* (6403.0)
- Export Price Index, Australia* (6405.0)
- Price Index of Materials Used in Building Other than House Building, Six State Capital Cities and Darwin* (6407.0)
- Price Index of Materials Used in House Building, Six State Capital Cities* (6408.0)
- Price Indexes of Materials Used in Manufacturing Industries, Australia* (6411.0)
- Price Indexes of Articles Produced by Manufacturing Industry, Australia* (6412.0)
- Import Price Index, Australia* (6414.0)
- Price Indexes of Materials Used in Coal Mining, Australia* (6415.0)
- House Price Indexes, Eight Capital Cities* (6416.0)
- A guide to the Consumer Price Index* (6440.0)
- The Australian Consumer Price Index: Concepts, Sources and Methods* (6461.0)
- 1984 Household Expenditure Survey, Victoria* (6501.2)
- Information Paper: 1984 Household Expenditure Survey* (6527.0)
- 1988-89 Household Expenditure Survey, Australia*
 - Preliminary (June to December)* (6528.0)
 - Summary of Results* (6530.0)
 - Household Characteristics* (6531.0)
 - Specific Commodities* (6532.0)
 - Household Expenditure by States and Territories* (6533.0)
 - Consumer Credit Expenditure* (6534.0)
 - Detailed Expenditure Items* (6535.0)
 - Changes in Household Expenditure between 1975-76 and 1988-89* (6536.0)

Information Paper: Sample File on Magnetic Tape (6544.0)
Retail Trade, Australia, (8501.0)
Retail Industry: Details of Operations, Australia, 1985-86, (8622.0)
Retail Industry: Details of Operations, Victoria, 1985-86, (8622.2)
Retail Industry: Small Area Statistics, Victoria, 1985-86, (8623.2)
*Retail Industry: Small Area Statistics, Victoria, 1985-86, Data on
Floppy Disk, Technical Details and Explanatory Notes (8641.2)*
*Wholesale Establishments: Details of Operations by Industry Class,
Australia, 1981-82 (8638.0)*
*Selected Tourism and Personal Service Industries
Summary of Operations, Australia, 1986-87, Preliminary (8650.0)*

Information Papers

*The Australian Consumer price Index: Feasibility of Constructing Price
Indexes for Special Population Groups (6445.0)*
The Australian Consumer price index: 12th Series Review (6450.0)
*Consumer Price Index, Technical Consultative Committee, Report of the
12th Series CPI Review (No Catalogue Number)*

