

Australian industry data to March Qtr 2009

Industry growth summary, 2009

03 June 2009

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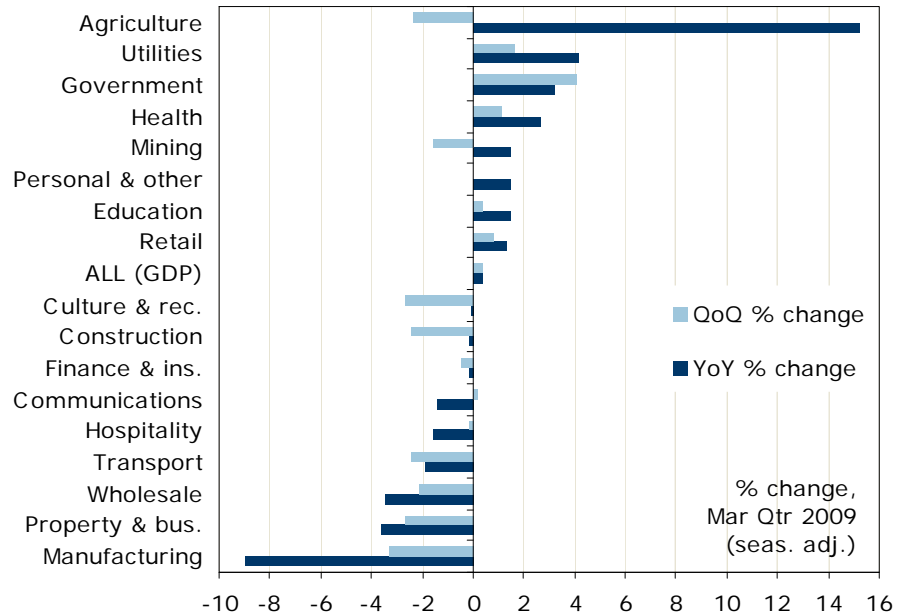
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Real gross value added, quarterly and annual growth to March 2009



Real gross value added , % p.a. (seas. adj.)	2006	2007	2008	Q1 2009	2009-10 direction
Agriculture, forestry, fishing	-4.1	-12.5	10.4	15.2	↑
Mining & services	1.8	5.5	2.9	1.5	↓
Manufacturing	-0.9	3.2	1.9	-9.0	↓
Electricity, gas & water	2.0	-2.7	2.4	4.2	→
Construction	5.5	7.2	4.7	-0.1	↓
Wholesale trade	2.0	2.7	2.0	-3.5	↓
Retail trade	2.4	5.1	2.1	1.3	↓
Hospitality	3.3	1.8	-1.8	-1.6	↓
Transport & storage	3.7	6.2	4.1	-1.9	↓
Communications services	8.7	9.3	4.0	-1.4	→
Finance & insurance	6.5	10.3	0.1	-0.1	↓
Property & business	3.0	3.0	4.8	-3.6	↓
Gov. admin. & defence	4.2	1.6	0.3	3.2	↑
Education	1.4	1.5	1.5	1.5	↑
Health & community	3.0	2.4	2.6	2.7	↑
Cultural & recreational	2.9	7.7	2.0	-0.05	↓
Personal & other services	4.0	3.8	3.1	1.5	↓
All industries (GDP)	2.8	4.0	2.1	0.4	↓

For further detail on individual industries, see *ANZ Industry Outlook 2009*.

For the latest macroeconomic forecasts, see *ANZ Markets Weekly*.

All Australian industries, size and growth (latest data)

Industry	Current size						Current growth rates					
	Registered operating businesses ^a	Gross value added ^b , per qtr, seas adj	Relative size ^b (share of GDP)	Corp. profits ^c per qtr, seas adj	Total employment, seas adj	Full-time employment (share)	Gross value added ^b growth, seas adj	Corp. profits growth ^c , seas adj	Private capital expend. ^d growth, seas adj	New finance ^e average growth	Employment, seas adj	Wage price index ^f growth
Date (Quarter)	Jun 2007	Mar 2009	Mar 2009	Mar 2009	Feb 2009	Feb 2009	Mar 2009	Mar 2009		Mar 2009	Feb 2009	Mar 2009
Unit	number	\$mn	% share	\$mn	'000	% f/t	% p.a.	% p.a.	% p.a.	% p.a.	% p.a.	% p.a.
Agriculture, forestry, fishing	214,795	7,293	2.5	1,491	358.8	73.7	15.2	20.1	na	-4.3	9.7	na
Mining & services to mining	7,205	21,207	7.8	20,045	165.0	97.0	1.5	56.5	32.2	-21.4	19.6	5.7
Manufacturing	106,565	24,716	9.6	6,423	1,014.5	87.0	-9.0	-37.7	-2.2	-42.8	-5.4	3.6
Electricity, gas & water supply	1,968	5,715	2.1	na	148.7	90.8	4.2	na	na	na	29.6	4.8
Construction	322,404	19,472	7.3	2,376	979.7	86.3	-0.1	10.4	-6.1	-15.4	-0.5	4.6
Wholesale trade	85,398	11,839	4.5	4,462	394.5	82.1	-3.5	8.9	16.3	-20.7	-3.6	4.2
Retail trade	219,308	14,994	5.4	3,721	1,212.5	52.0	1.3	13.4	15.5	-2.4	-1.2	3.7
Accomm., cafes, restaurants	56,678	5,046	1.9	na	704.7	43.6	-1.6	na	na	na	-0.1	3.5
Transport & storage (& post*)	117,323	12,546	4.8	2,680	593.3	79.3	-1.9	-9.9	49.1	-9.4	10.4	4.4
Communication services	23,998	6,577	2.5	na	224.8	81.2	-1.4	na	na	na	-1.6	2.8
Finance & insurance	136,587	20,401	7.3	8,654	393.2	84.7	-0.1	8.4	20.5	-14.8	-1.7	4.1
Property & business services	507,508	31,720	12.2	4,648	1,301.3	72.8	-3.6	-20.9	-28.6	-38.3	-3.9	4.9
- Rental & real estate services*					176.2	76.6					-12.0	
- Professional services*					769.4	78.2					-4.5	
- Administrative services*					355.7	59.5					2.1	
Government admin. & defence	na	10,536	3.7	na	666.0	85.1	3.2	na	na	-32.0	5.3	4.2
Education	16,265	11,101	4.1	na	792.1	64.8	1.5	na	na	na	-1.3	4.6
Health & community services	92,318	16,318	5.9	na	1,153.6	58.1	2.7	na	na	-56.8	4.5	4.1
Cultural & recreational services	46,808	4,026	1.5	na	212.0	58.7	-0.05	na	na	-43.0	10.5	3.9
Personal & other services	56,642	5,065	1.8	na	450.4	73.8	1.5	na	na		-4.3	4.3
All industries (GDP)	2,011,770	273,468	100.0		10,765.0	71.5	0.4	8.7	12.8	-34.0	0.6	4.1

Indicators that have DECLINED since the previous data period (last quarter) are highlighted in RED. For growth rates, a red entry means growth has DECELERATED.

- a. Registered private businesses that were operating on 30 June 2007.
- b. Gross value added per quarter, chain volume measures, seasonally adjusted. Total equals GDP, including ownership of dwellings, taxes less subsidies and statistical discrepancy.
- c. Nominal company gross operating profits (GOP) per quarter, for businesses employing 20 people or more, available for selected industries only, sourced from the ABS Business Indicators Survey. For agriculture, profits is nominal 'realised agricultural income' (excludes forestry and fishing). For finance and insurance, profits is nominal 'corporate gross operating surplus', seasonally adjusted. For all industries, profits is total nominal corporate gross operating surplus, seasonally adjusted, sourced from ABS *National Accounts*.
- d. Actual new capital expenditure by private companies per quarter, current prices, seasonally adjusted. Includes expenditure on buildings, structures, plant and equipment.
- e. New lending finance commitments to businesses per month, nominal annual growth, 3 month moving average. Includes fixed loans, revolving credit and lease finance.
- f. Wage price index for total hourly rates of pay excluding bonuses, in public and private sectors, nominal original data. 2003-04 = 100.

Sources: ABS 5206.0, *Australian National Accounts*; ABS 5625.0, *Private New Capital Expenditure and Expected Expenditure*; ABS 5671.0, *Lending Finance Australia*; ABS 5676.0, *Business Indicators*; ABS 6291.0.55, *Labour Force Australia*; ABS 6345.05, *Labour Price Index*; ABS 8165.0 *Counts of Australian Businesses*.

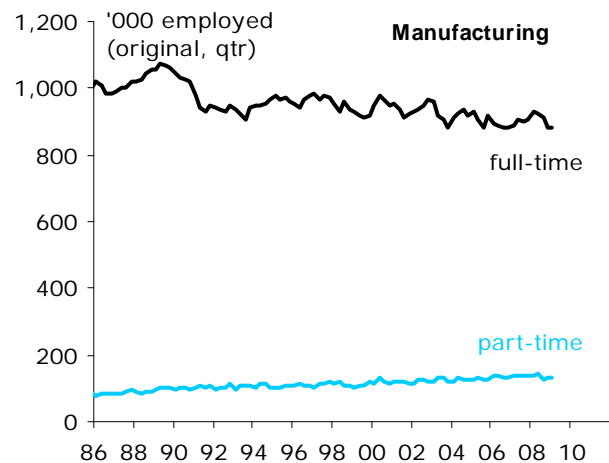
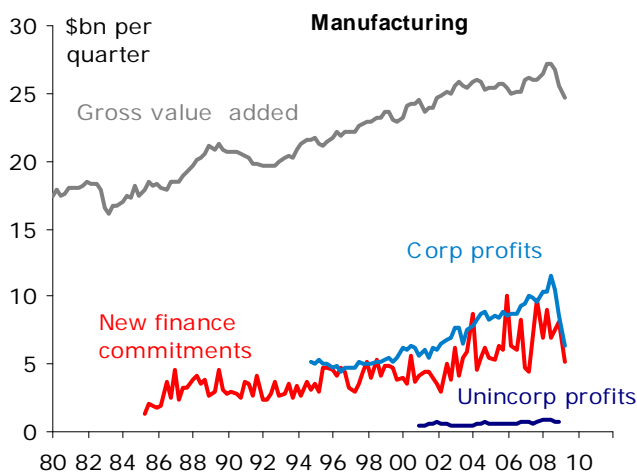
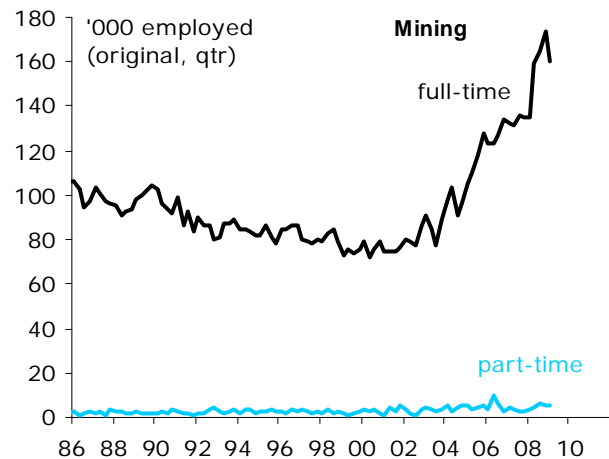
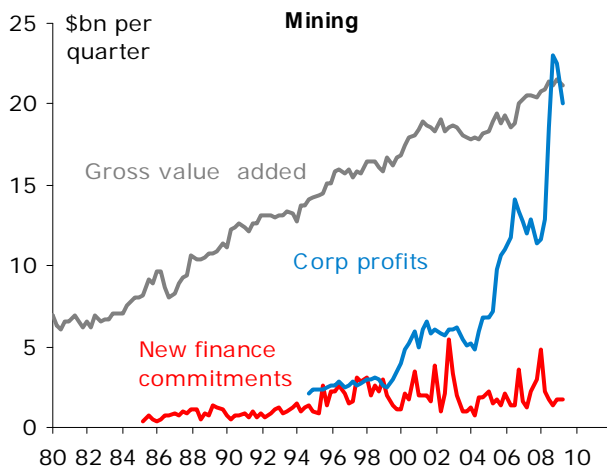
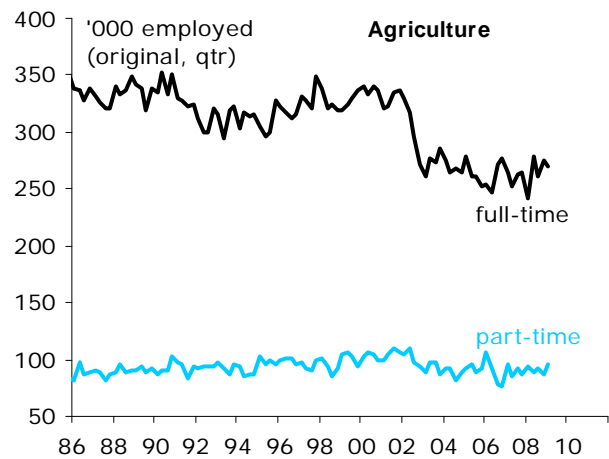
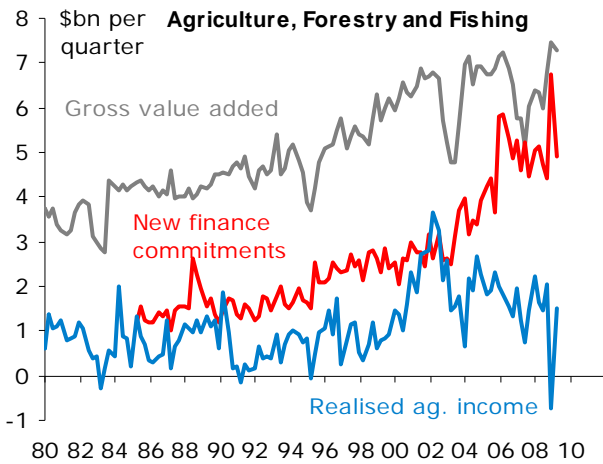
Major industry division concordance, ANZSIC 1993 and 2006*

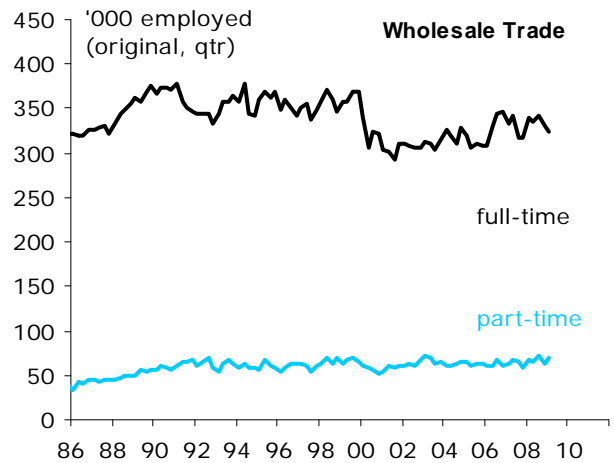
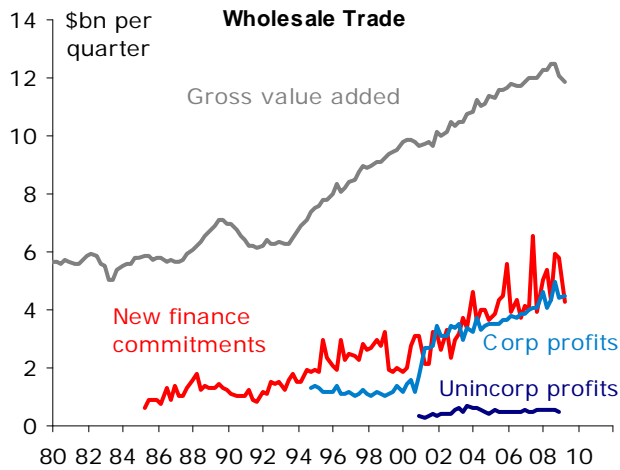
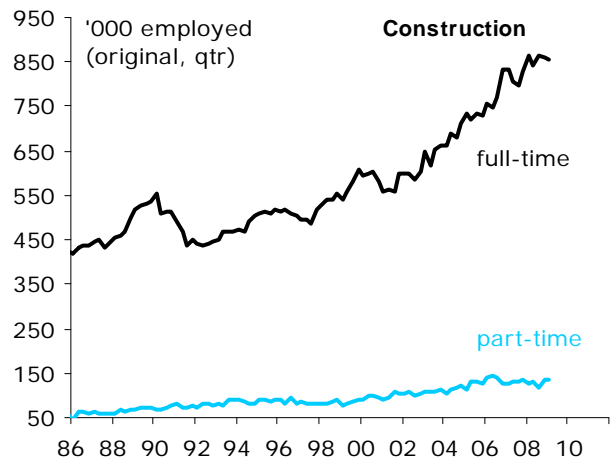
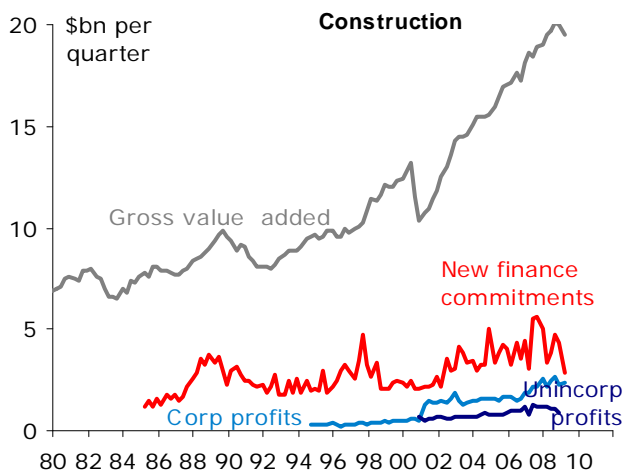
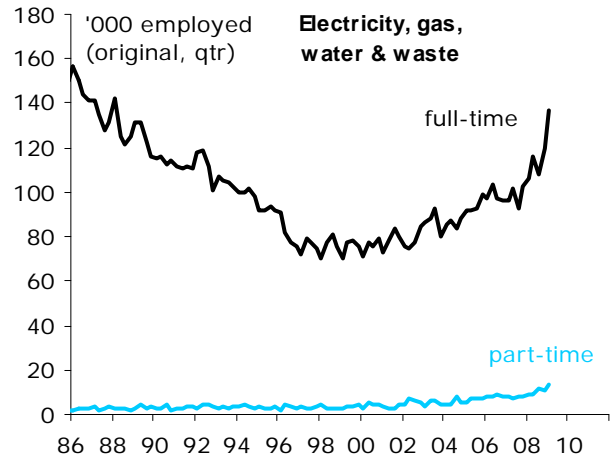
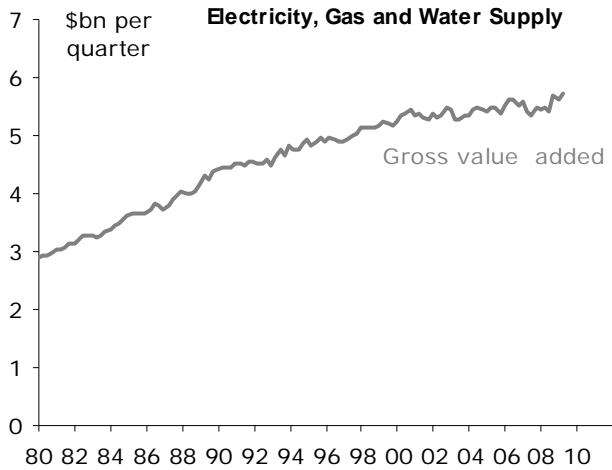
ANZSIC 1993 (17 major industry Divisions)	ANZSIC 2006 (19 major industry divisions)
Agriculture, forestry and fishing	Agriculture, forestry and fishing
Mining & services to mining	Mining and services to mining
Manufacturing	Manufacturing
Electricity, gas & water supply (Utilities)	Electricity, gas, water and waste services (Utilities)
Construction	Construction
Wholesale trade	Wholesale trade
Retail trade	Retail trade
Accommodation, cafes, restaurants (Hospitality)	Accommodation and food services (Hospitality)
Transport & storage	Transport, post and warehousing
Communication services	Information, media and telecommunications
Finance & insurance	Finance and Insurance
Property & business services	Rental, hiring & real estate services
	Professional, scientific and technical services
	Administrative and support services
Government administration & defence	Public administration and defence
Education	Education and training
Health & community services	Health care and social assistance
Cultural & recreational services	Arts and recreation services
Personal & other services	Other services

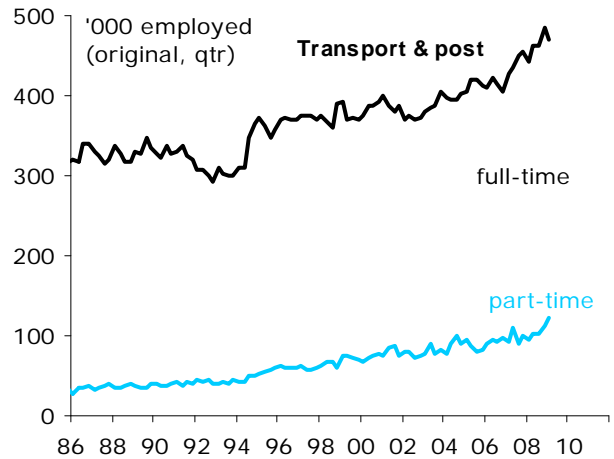
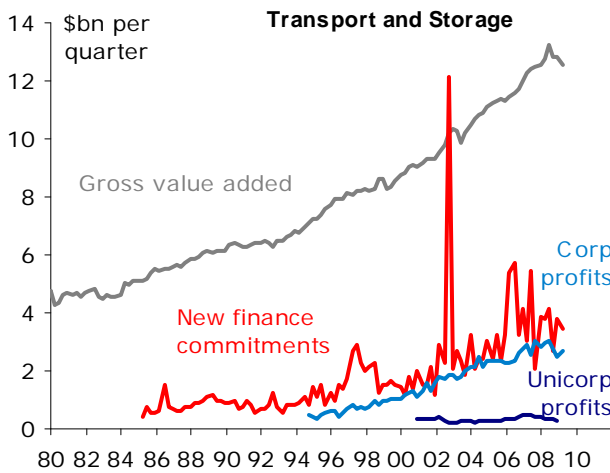
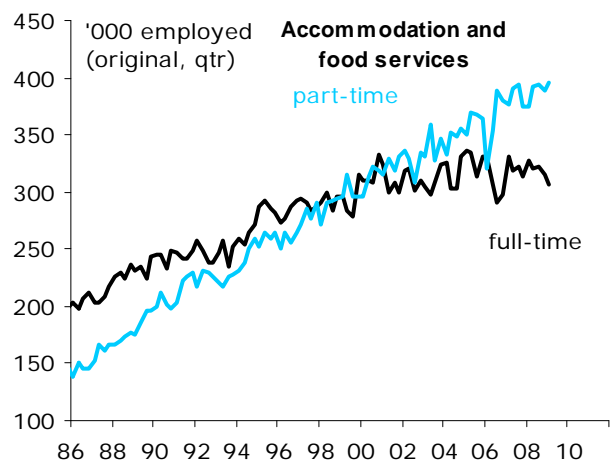
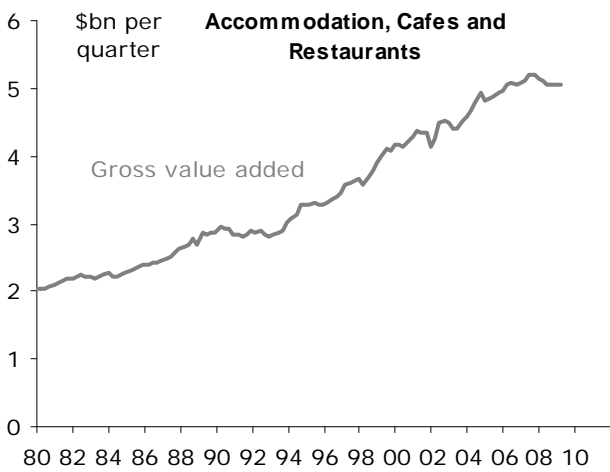
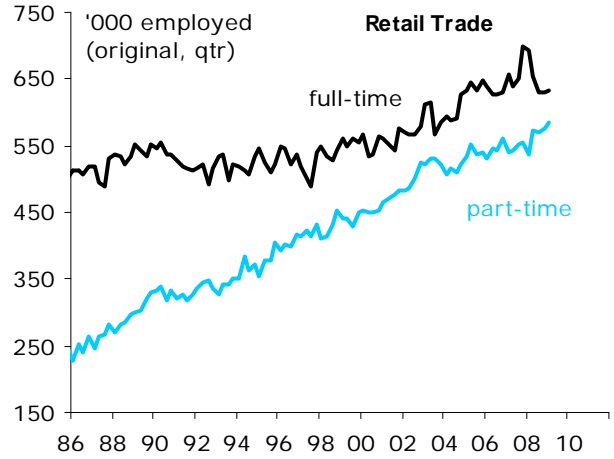
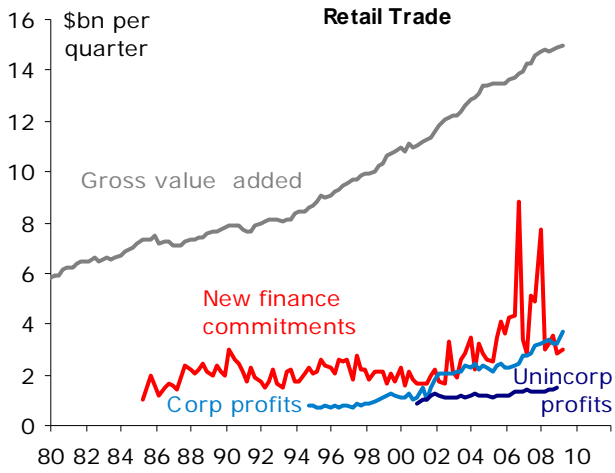
* For full details, see ABS 1292.0, *Australian and New Zealand Standard Industrial Classification (ANZSIC), 2006* and related publications on the ABS website.

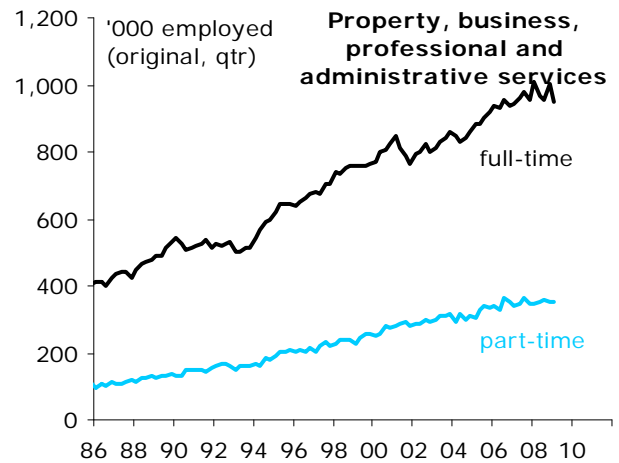
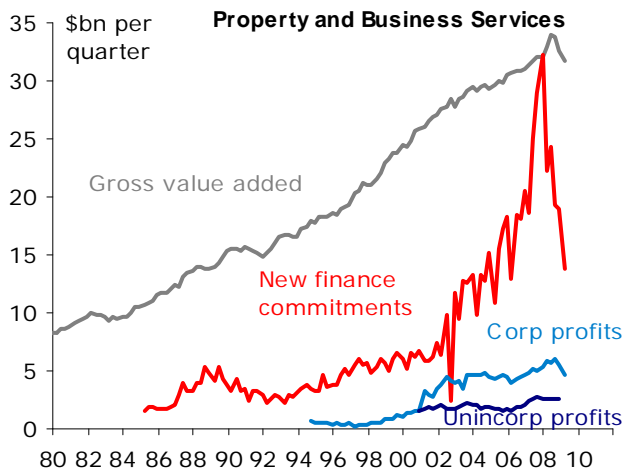
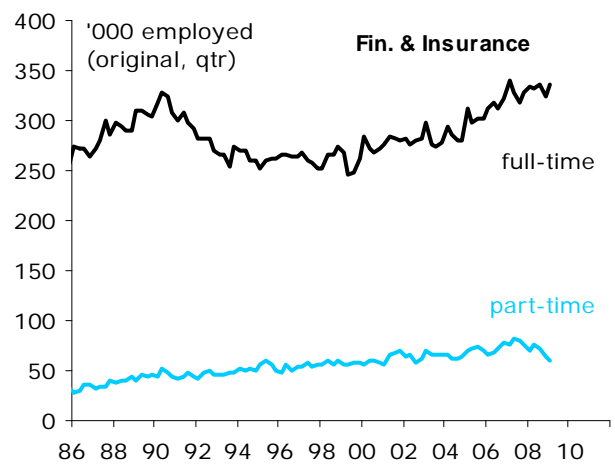
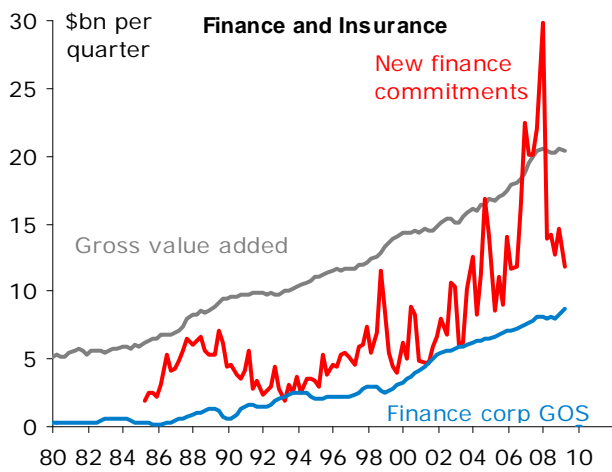
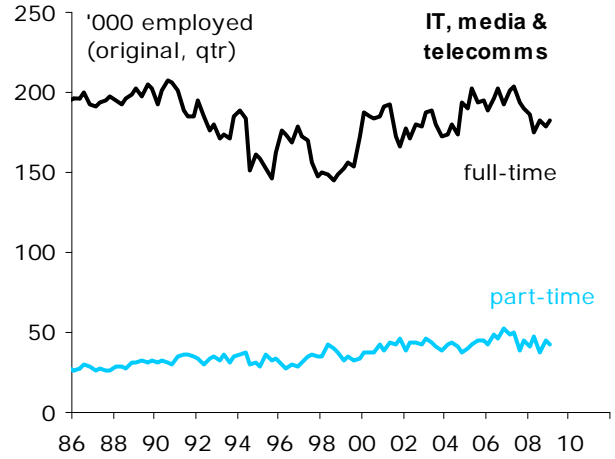
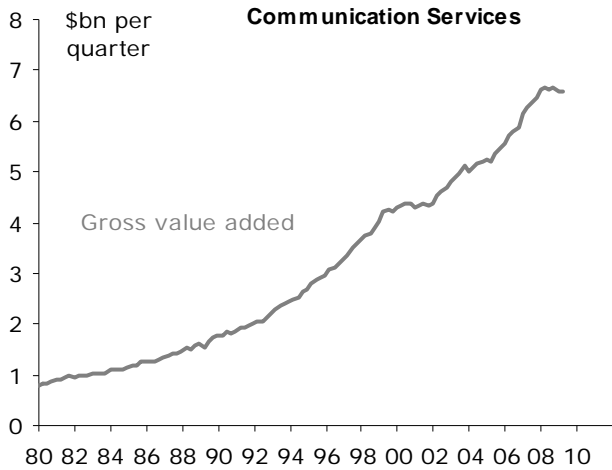
All Australian industries, activity and employment trends

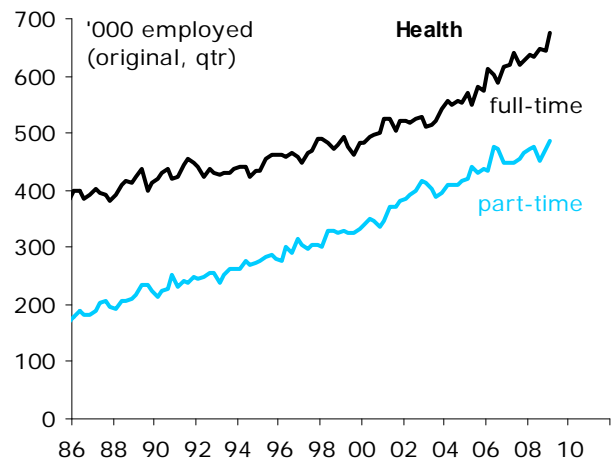
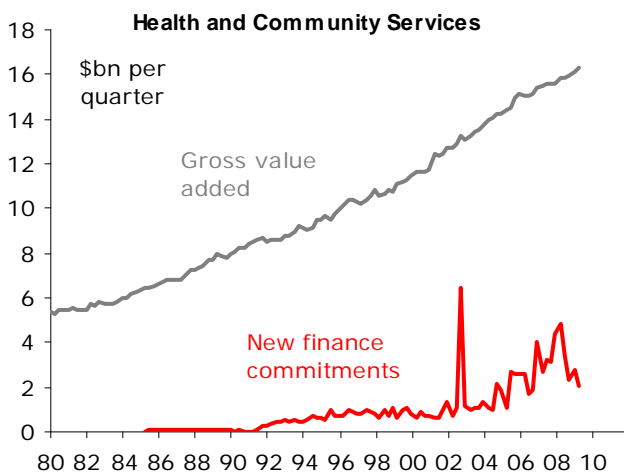
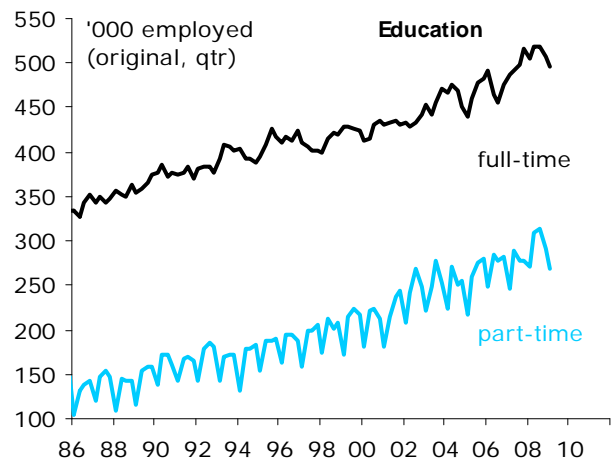
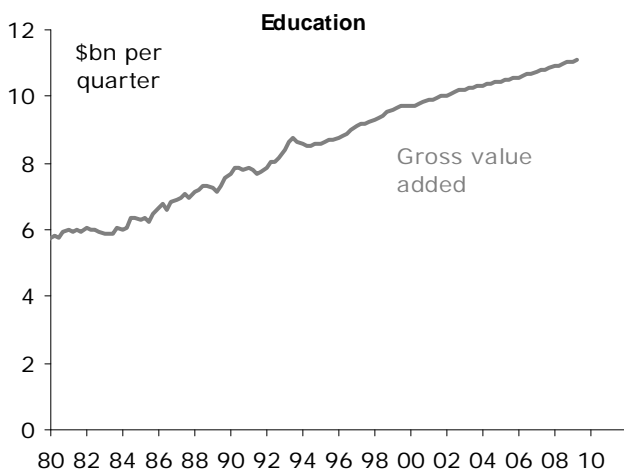
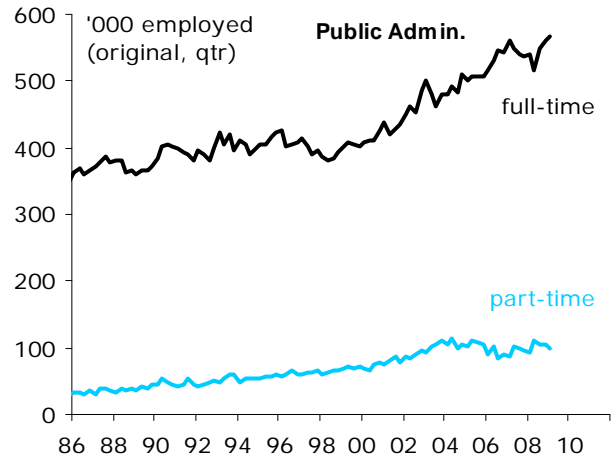
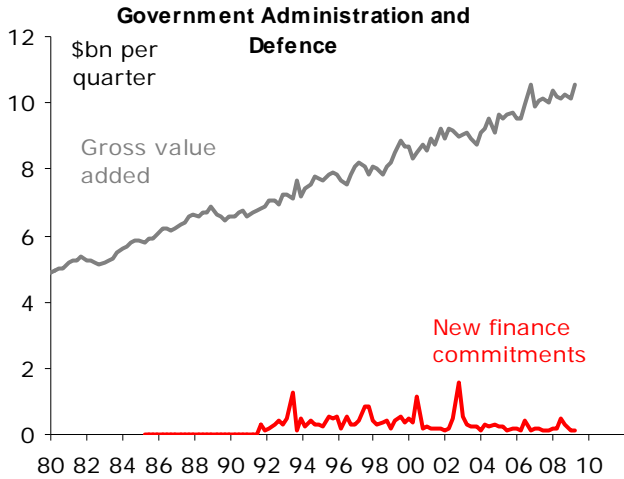
- Industry real gross value added (chain volume measures, seasonally adjusted), \$bn per quarter, to Mar 2009
- Corporate profits (gross operating profits or surplus, seasonally adjusted), \$bn per quarter, to Mar 2009
- Unincorporated business profits (gross operating profits, seasonally adjusted), \$bn per quarter, to Mar 2009
- New commercial finance commitments including fixed, revolving and lease (original), \$bn per quarter, to Mar 2009
- Full-time employees who usually work 35 hours or more per week (original), '000 people per quarter, to Feb 2009
- Part-time employees who usually work less than 35 hours per week (original), '000 people per quarter, to Feb 2009

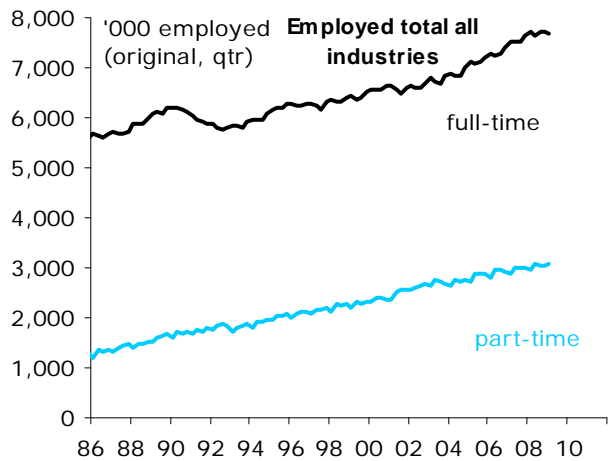
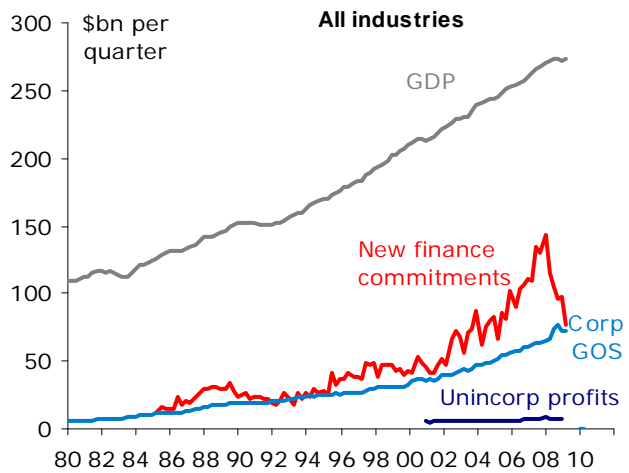
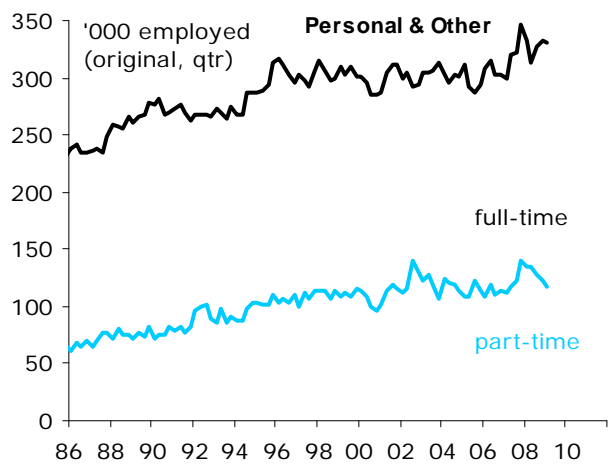
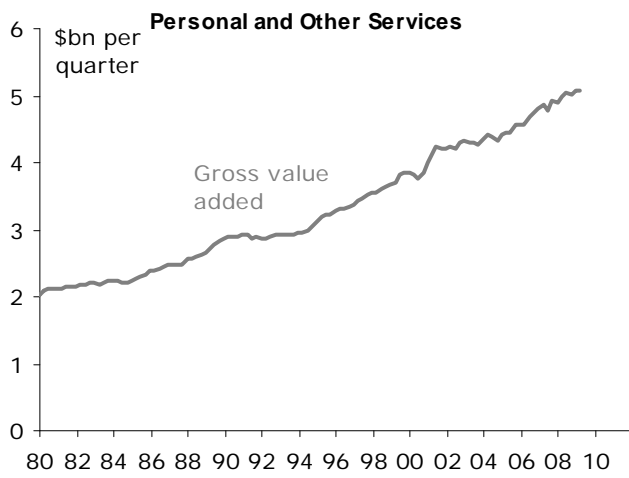
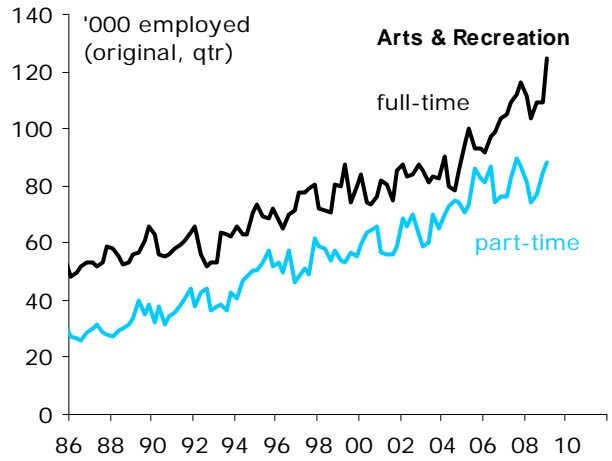
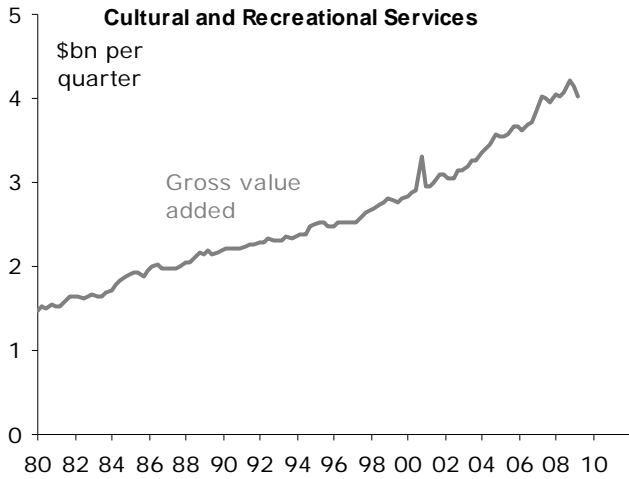










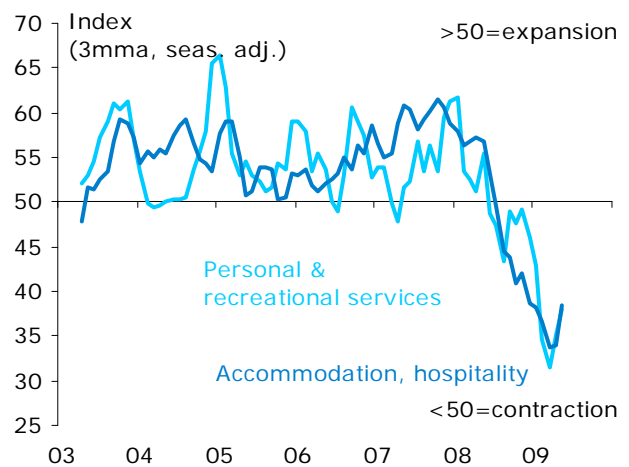
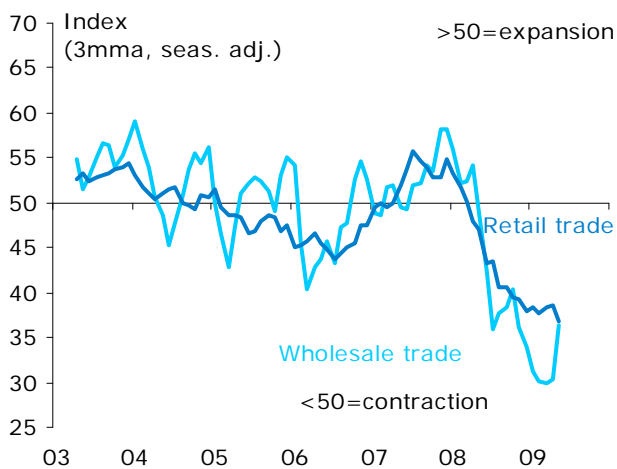
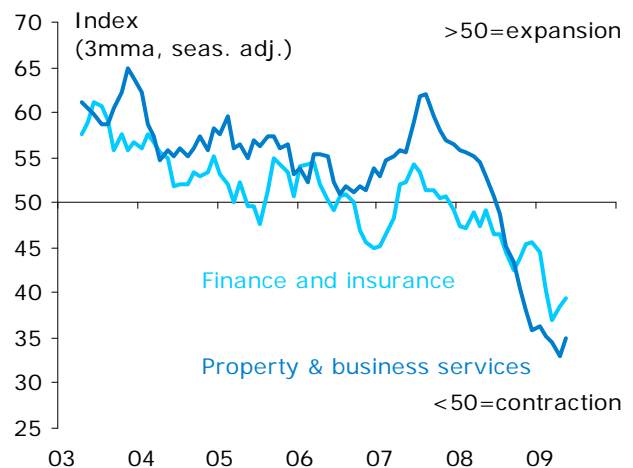
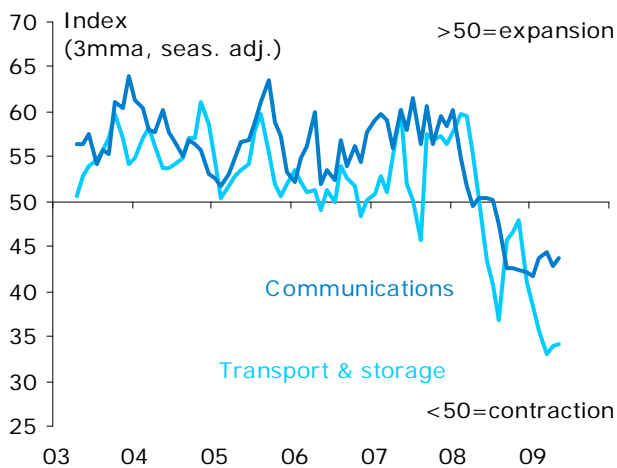
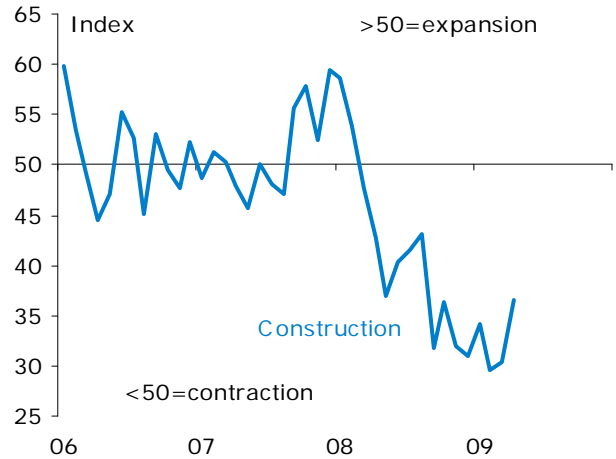
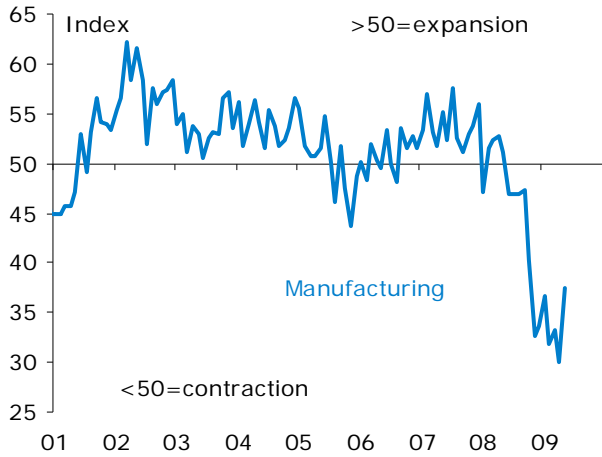


AiG industry performance indexes

Levels over 50 indicate the industry is, on balance, expanding.

Levels below 50 indicate the industry is, on balance, contracting.

Monthly data to May 2009.



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