

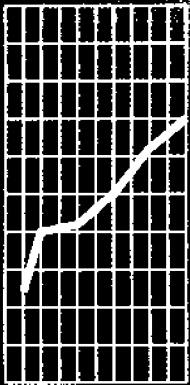


1994-95

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Electricity and Gas Operations

Australia



NOTES

IN THIS ISSUE

This publication presents information relating to both the electricity and gas industries. Information for electricity is available at the State and national level. However tables relating to gas present data only at the national level. More detailed tables are not available for gas, as they may provide information about individual businesses or organisations.

Care should be exercised when comparing data across States due to the differences in accounting methods and also the rate at which restructuring of industries has taken place.

Some of the data published in the 1993-94 issue of this publication have been revised to take account of changes to previously reported data.

Statistics collected at the management unit level can contain data about activities normally associated with industries other than electricity or gas, because of the inclusion of establishments that are part of that management unit but are not predominantly engaged in the electricity or gas industries (see Explanatory Notes for details).

Recent changes in the structure of the electricity and gas industries has reduced the comparability of the data between years. Users of the data are referred to the introduction for each industry for further explanation.

INQUIRIES

For information about other ABS statistics and services, please refer to the back of this publication.

For further information about these statistics, contact Helen Shannon on Adelaide (08) 8237 7382.

W. McLennan
Australian Statistician

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CHAPTER 1

OVERVIEW

ELECTRICITY OPERATIONS

Turnover

- Turnover of management units decreased by \$776m (4%) to \$21,246m in 1994-95.

Industry gross product

- Industry gross product (at the management unit level) fell by 13% from \$9,898m in 1993-94 to \$8,594m in 1994-95.

Value added

- Value added decreased by \$765m (8%) from \$9,959m in 1993-94 to \$9,194m in 1994-95 (measured at establishment level).

Trading profit

- Total trading profit (at the management unit level) decreased by \$1,160m (13%) from \$8,844m in 1993-94 to \$7,684m in 1994-95.

Employment

- Total management unit employment decreased from 48,089 persons at the end of June 1994 to 44,425 persons at the end of June 1995, a fall of 8%.

GAS OPERATIONS

Turnover

- National turnover at the management unit level increased by \$366m (15%) from \$2,437m in 1993-94 to \$2,803m in 1994-95.

Industry gross product

- Industry gross product (management unit) rose by \$4m (less than 1%) to \$882m in 1994-95.

Value added

- Value added increased from \$1,635m in 1993-94 to \$1,675m in 1994-95, an increase of 2% (measured at establishment level).

Trading profit

- Total trading profit (at the management unit level) decreased by \$45m (5%) to \$799m in 1994-95.

Employment

- Total management unit employment at the end of June 1995 decreased by 336 persons (5%) to 6,738 persons.

INTRODUCTION

The pursuit of a more competitive and efficient electricity industry has seen substantial changes to the structure of the industry in the past few years. Micro-economic reform has resulted in the corporatisation of State-owned utilities in Queensland, New South Wales and Victoria. In Victoria, the industry has also seen the emergence of private operators. Previously vertically integrated utilities have been disaggregated into generation, transmission and distribution bodies that all compete in a market designed to provide customers with choice.

The move to a national electricity market has also resulted in restructuring in South Australia, although the corporatisation of that State's primary electricity body did not occur until 1 July 1995 and hence the effect is not reflected in the data presented in this issue. Western Australia's State-owned utility, which combined electricity and gas, has also been subject to restructuring, although the Australian Bureau of Statistics (ABS) has been advised that it is unlikely to become part of the national grid in the foreseeable future.

The effects of these structural changes are reflected in the information presented in the following tables. For example, expenses associated with outward freight and cartage have escalated as a direct result of transmitters of electricity charging generators and distributors for use of their transmission lines.

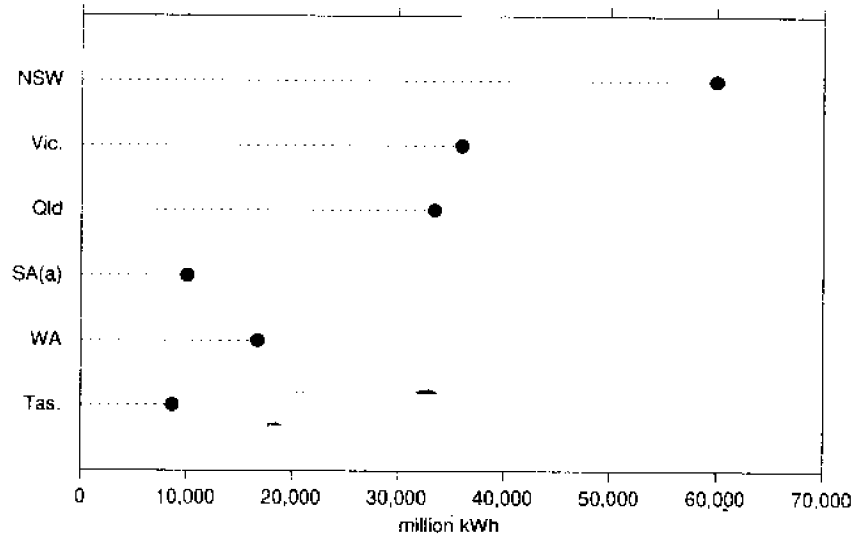
The effects of a continuing privatisation program in Victoria are reflected in the management unit and establishment data for that State. The initial phases of restructuring resulted in the creation of separate units responsible for brown coal mines, generation, distribution and transmission. Under these arrangements the transmission body purchased and resold electricity. However, in 1994-95 the next phase of privatisation has resulted in the cessation of this arrangement. Instead the transmission body now only charges for use of the power lines. The result has been an overall decrease in the magnitude of reported purchases and sales of electricity, coupled with an increase in outward freight and cartage expenses for generators and distributors and an increase in service income for transmission bodies.

In Western Australia the divestment of gas operations from the electricity industry management unit data during the reference period has resulted in some differences between data reported in 1993-94 and 1994-95.

An increasingly important component of the electricity industry is co-generation. A number of co-generation plants have been commissioned across Australia. Capacities and fuel sources vary substantially. Landfill sites are increasing in number and coal bed methane is under investigation.

GENERATION

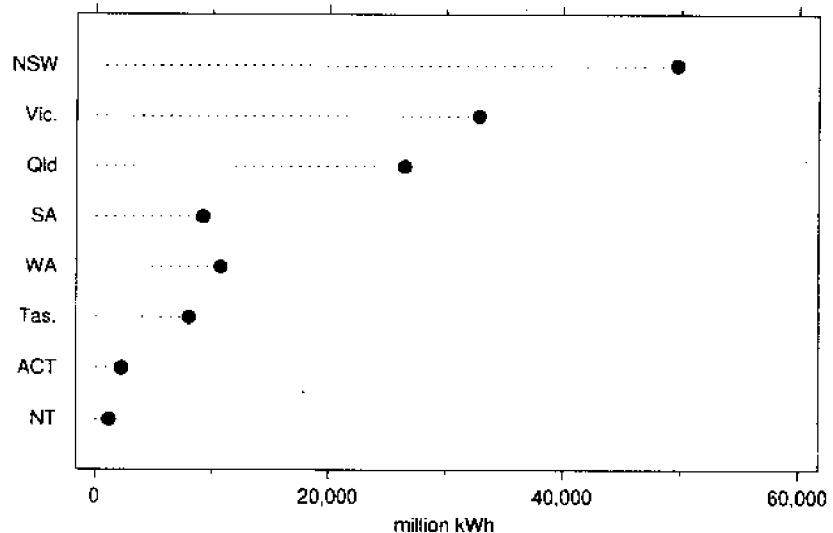
In 1994–95 electricity establishments produced 165,063 million kWh compared with 161,813 million kWh in 1993–94, an increase of 2%. New South Wales remains the largest producer, representing 36% of the total production.



(a) Includes the Northern Territory.

CONSUMPTION

Total electricity consumption in Australia in 1994–95 was estimated to be 140,527 million kWh, an increase of 5% from the previous year. Approximately 68% of all electricity consumed in Australia is consumed by industrial and commercial users.



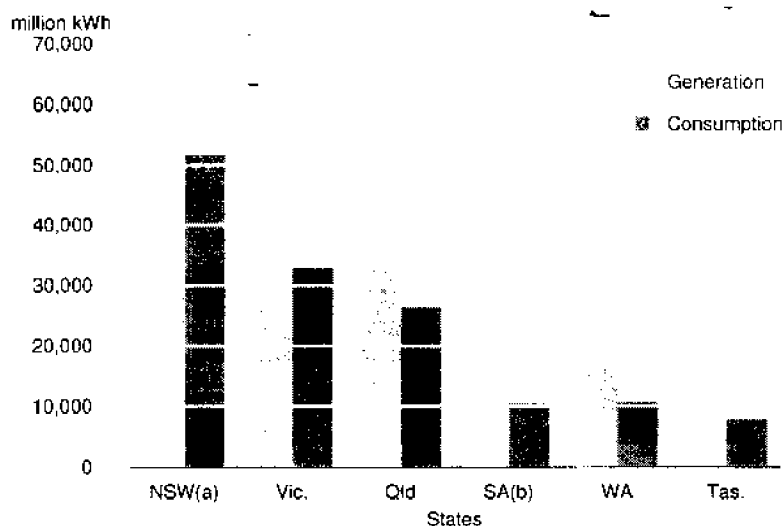
CONSUMPTION *continued*

The pattern of electricity consumption by State reflects population distribution and the location of major industries. In 1994–95 electricity consumption was concentrated in New South Wales and Victoria which consumed 35% and 23% of the national total respectively. In South Australia the data showed that consumption of electricity exceeds the quantity of generated electricity. Although the data are obtained from different sources, the effect highlights the introduction of the national electricity market where customers in one State are able to buy electricity generated in another State.

Electricity consumption per customer varied across the States with high levels recorded in Tasmania (33,500 kWh) and the Northern Territory (20,300 kWh). South Australia and Western Australia recorded the smallest consumption levels per customer with 13,100 kWh and 15,200 kWh respectively. Natural gas is not used in Tasmania (only town gas and LPG are used) and only to a very small extent in the Northern Territory.

Metered electricity consumption accounted for 85% of total electricity generated during 1994–95, an increase of 2%.

Generation and consumption



(a) Includes the Australian Capital Territory.

(b) Includes the Northern Territory.

National residential consumption of electricity per capita was 2,300 kWh in 1994–95. Consumption per capita varied across the States. Tasmania recorded the highest consumption level, 3,700 kWh per capita, while Western Australia recorded the lowest with 1,700 kWh per capita.

In the combined commercial and industrial sectors Tasmania again recorded the highest consumption level of 153,000 kWh per customer and South Australia the lowest with 67,400 kWh per customer.

YEAR ENDED 30 JUNE 1995 - POPULATION AS AT 31 DECEMBER 1994

LEGEND

Generation

- ★ Generation of two or more thermal stations
- Thermal Stations
- ▲ Hydro Stations

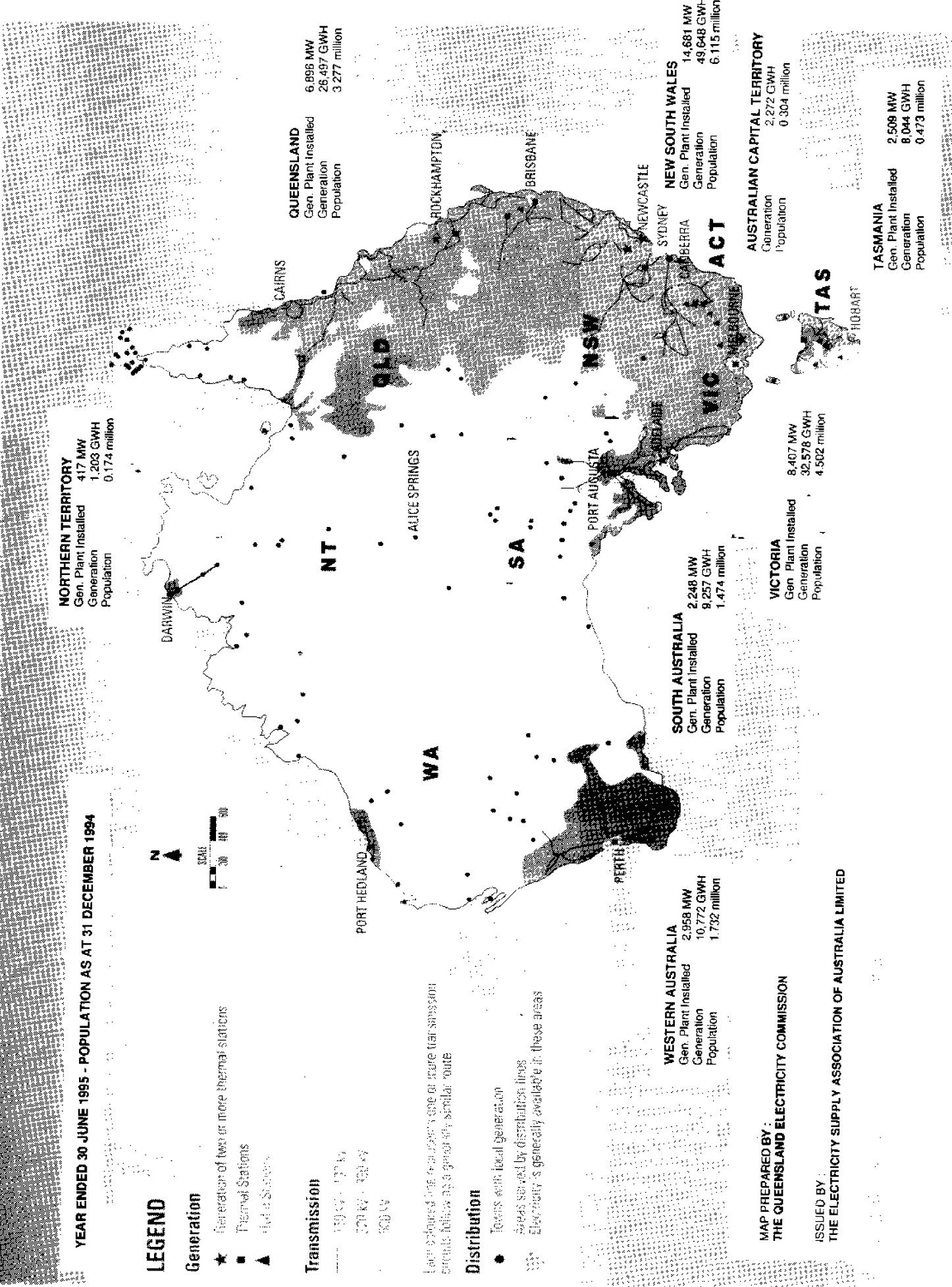
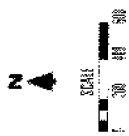
Transmission

- 132 kV - 138 kV
- 220 kV - 252 kV
- 500 kV

Distribution

- Towns with local generation
- Areas served by distribution lines
- Electricity is generally available in these areas

Large numbers of thermal stations or more than six stations are shown as a generalised symbol.



NORTHERN TERRITORY
 Gen. Plant Installed 417 MW
 Generation 1,203 GWH
 Population 0.174 million

QUEENSLAND
 Gen. Plant Installed 6,896 MW
 Generation 26,497 GWH
 Population 3,277 million

NEW SOUTH WALES
 Gen. Plant Installed 14,681 MW
 Generation 49,648 GWH
 Population 6,115 million

AUSTRALIAN CAPITAL TERRITORY
 Generation 2,272 GWH
 Population 0,304 million

TASMANIA
 Gen. Plant Installed 2,509 MW
 Generation 8,044 GWH
 Population 0,473 million

SOUTH AUSTRALIA
 Gen. Plant Installed 2,248 MW
 Generation 9,257 GWH
 Population 1,474 million

VICTORIA
 Gen. Plant Installed 8,407 MW
 Generation 32,578 GWH
 Population 4,502 million

WESTERN AUSTRALIA
 Gen. Plant Installed 2,958 MW
 Generation 10,772 GWH
 Population 1,732 million

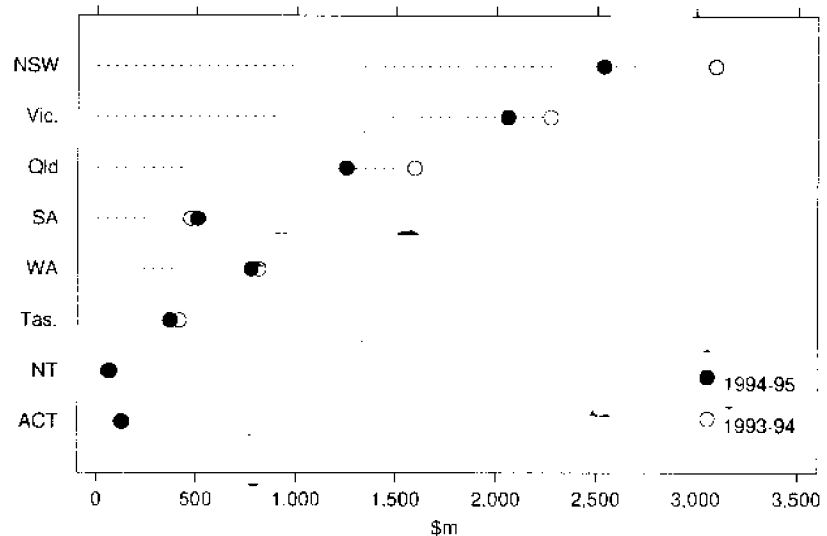
MAP PREPARED BY:
THE QUEENSLAND ELECTRICITY COMMISSION

ISSUED BY:
THE ELECTRICITY SUPPLY ASSOCIATION OF AUSTRALIA LIMITED

TRADING PROFIT

Industry restructuring aside, total trading profit decreased by \$1,160m (13%) from \$8,844m in 1993–94 to \$7,684m in 1994–95. New South Wales recorded the largest decrease, falling by \$560m (18%) to \$2,535m in 1994–95. Trading profit decreased by \$340m (21%) in Queensland, falling to \$1,252m in 1994–95. The decline in trading profit in Victoria of \$211m (9%) to \$2,058m is due almost entirely to the structural changes described earlier.

New South Wales accounted for 33% of national trading profit in 1994–95.



EARNINGS BEFORE INTEREST AND TAX

Comparisons of earnings and costs, both over time and between States, require considerable caution, because of changes in industry structure.

Earnings before interest and tax (EBIT) is a measure of profit prior to the deduction of interest expenses and income tax. In 1994–95, national EBIT was \$3,781m, down 17% from \$4,568m in 1993–94. New South Wales recorded the largest decrease in reported EBIT, falling by \$592m (38%) to \$978m in 1994–95 primarily due to an increase in transmission charges arising from industry restructuring. An increase in purchases and selected expenses was the main reasons for the reported decrease in EBIT of \$298m (30%) to \$693m in Queensland during 1994–95. South Australia recorded the largest increase in EBIT, rising by \$97m (95%) to \$200m in 1994–95.

Declining labour costs due to a decline in employment levels have been a contributing factor in offsetting the fall in trading profit. Selected labour costs decreased by \$129m (5%) in 1994–95 to \$2,443m.

OPERATING PROFIT BEFORE TAX

Operating profit before tax (OPBT) is calculated by deducting the cost of interest expenses from EBIT. At a national level OPBT decreased by 37% from \$2,183m in 1993–94 to \$1,366m in 1994–95. South Australia recorded the largest increase in OPBT, rising from \$30m in 1993–94 to \$124m in 1994–95. An increase was also recorded in Western Australia, up \$75m (86%) to \$162m in 1994–95.

TURNOVER

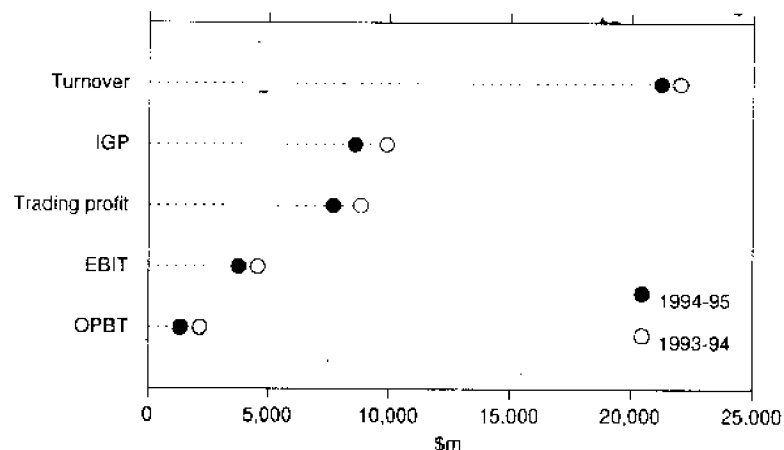
Turnover at the national level decreased by \$776m (4%) to \$21,246m in 1994–95. Victoria recorded the largest decrease due to structural changes, falling by \$795m or 12% to \$5,981m in 1994–95. In Western Australia, turnover fell by \$286m (15%) to \$1,595m in 1994–95 again primarily due to structural changes. The largest increase in turnover was recorded by Queensland, up \$156m to \$3,834m in 1994–95.

Sales of goods and services accounted for \$20,336m in 1994–95 or 96% of the total turnover figure. Capital work for own use contributed another \$790m or 4%. The decrease in total turnover can be attributed primarily to a fall in sales revenue.

INDUSTRY GROSS PRODUCT

Industry gross product (IGP) fell by 13% from \$9,898m in 1993–94 to \$8,594m in 1994–95. New South Wales recorded the largest decrease in IGP, falling \$489m (14%) to \$2,933m in 1994–95 followed by Victoria, down \$347m (14%) to \$2,179m and Queensland, down \$298m (17%) to \$1,487m. IGP in the Australian Capital Territory increased by \$9m (6%) in 1994–95. The decrease in national IGP reflects the decline in turnover.

Selected indicators for 1993–94 and 1994–95

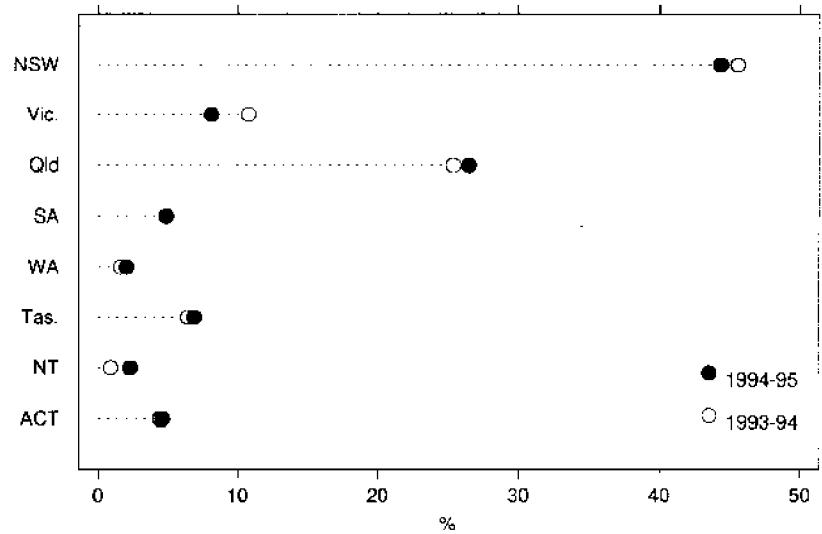


NET WORTH

Net worth is an indicator of the unencumbered value of assets. It is derived by deducting total liabilities (gross indebtedness) from the total value of assets. The restructuring within the industry has resulted in variations to the way assets are valued, the level of liability of businesses, and in some cases the sale of assets. Hence caution should be exercised when comparing the current value of assets and liabilities over time and between States.

Nationally, net worth decreased by \$1,310m (4%) to \$30,119m in 1994–95. Victoria recorded the largest decrease in net worth, falling from \$3,383m in 1993–94 to \$2,425m in 1994–95 (down 28%). New South Wales also reported a large decrease in net worth, falling from \$14,333m in 1993–94 to \$13,377m in 1994–95 (down 7%). Net worth in the Northern Territory increased by \$524m (185%) to \$808m primarily due to a revaluation of assets in 1994–95.

NET WORTH *continued*



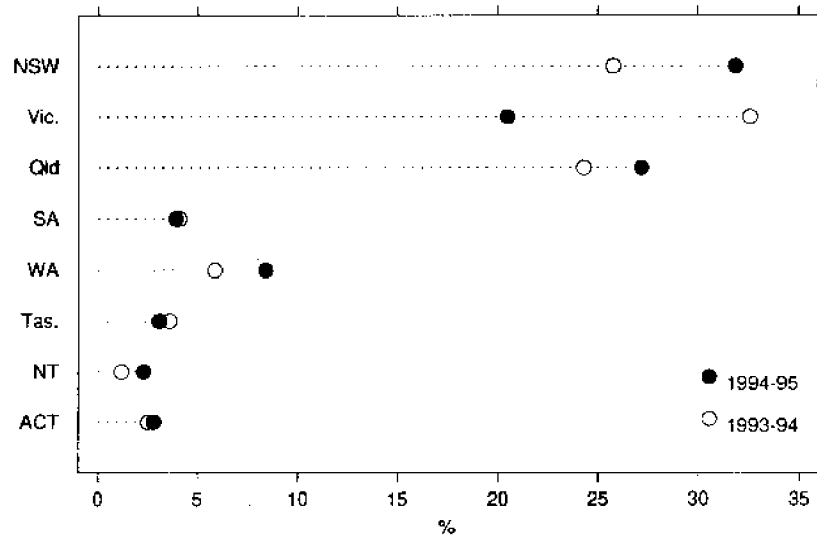
The decrease in net worth is attributable to the decrease in the value of non-current assets, down 1% to \$55,102m.

NET CAPITAL EXPENDITURE

Net capital expenditure is the difference between total acquisitions and disposals of assets. Total net capital expenditure decreased by 15% from \$2,165m in 1993-94 to \$1,845m in 1994-95. Most States recorded decreases in net capital expenditure for 1994-95.

Net capital expenditure decreased by \$327m (46%) to \$378m in Victoria during 1994-95. New South Wales recorded the largest increase of \$30m (5%) rising to \$589m in 1994-95.

Contribution to net capital expenditure



NET CAPITAL EXPENDITURE *continued*

Expenditure on plant, machinery and equipment increased by \$252m (33%) to \$1,007m in 1994–95, whilst expenditure on other buildings and structures fell by \$687m (43%) to \$928m during the same period.

PERFORMANCE MEASURES

While these are a very useful way of presenting summaries of performance, users of these statistics should refer to the Explanatory and Technical Notes before making any judgements based on these results. In addition, the restructuring of the industry will have distorted some comparisons.

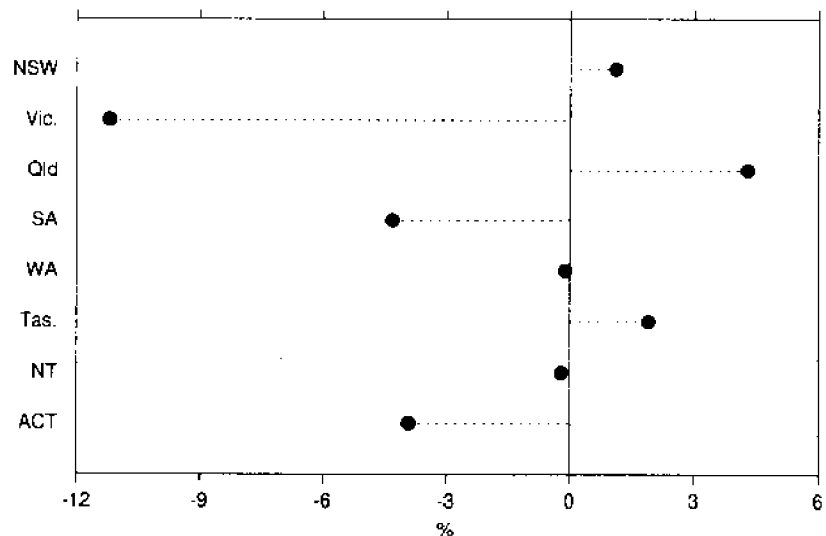
- trading profit margin decreased from 42% to 38%;
- acquisition to disposals ratio increased from 9.7 to 12.8;
- debts to assets increased from 53% to 54%; and
- return on funds decreased from 7.9% to 7.2%.

ESTABLISHMENT DETAILS

The effect of restructuring is not as dramatic at the establishment level. At the management unit level, activities such as gas supply that were incorporated into the electricity data for some organisations prior to restructuring, have almost always been allocated to the appropriate industry at the establishment level. Variations over time are more directly attributable to the streamlining of operations that often occur during restructuring.

Turnover at the establishment level decreased from \$21,441m in 1993–94 to \$20,896m in 1994–95 (down 3%). Queensland had the largest increase, rising \$160m (4%) to \$3,877m in 1994–95. Conversely turnover in Victoria decreased by \$747m (11%) to \$5,954m in the same period. The major reason for the overall decrease was a fall in the value of sales of electricity, which declined by \$1,221m (6%) to \$18,664m in 1994–95.

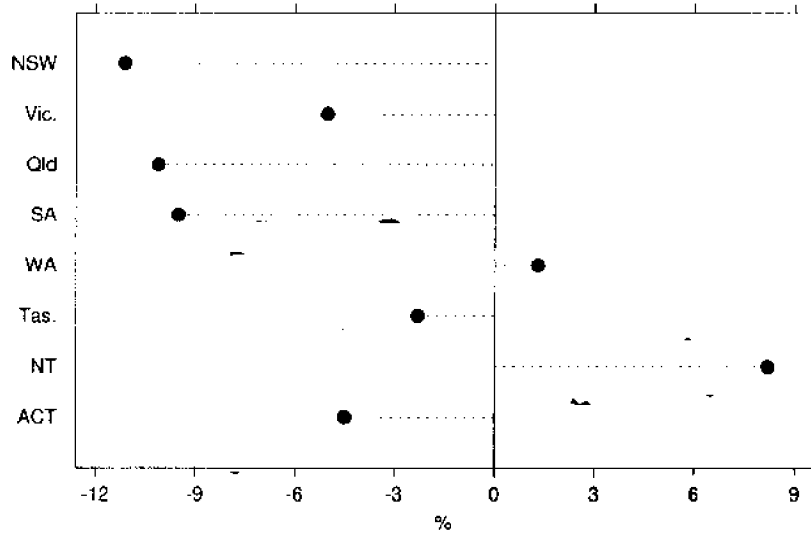
Change in turnover—1993–94 and 1994–95



ESTABLISHMENT DETAILS *continued*

Value added at establishment level decreased by \$765m (8%) to \$9,194m in 1994-95. Most States experienced a decrease in value added, with New South Wales recording the largest decrease, a fall of \$398m (11%) to \$3,186m in 1994-95 followed by Queensland which decreased by \$186m (10%) to \$1,658m. Increases in value added were recorded by the Northern Territory, up \$9m (8%) to \$116m and Western Australia, up \$10m (1%) to \$756m in 1994-95.

Change in value added--1993-94 and 1994-95



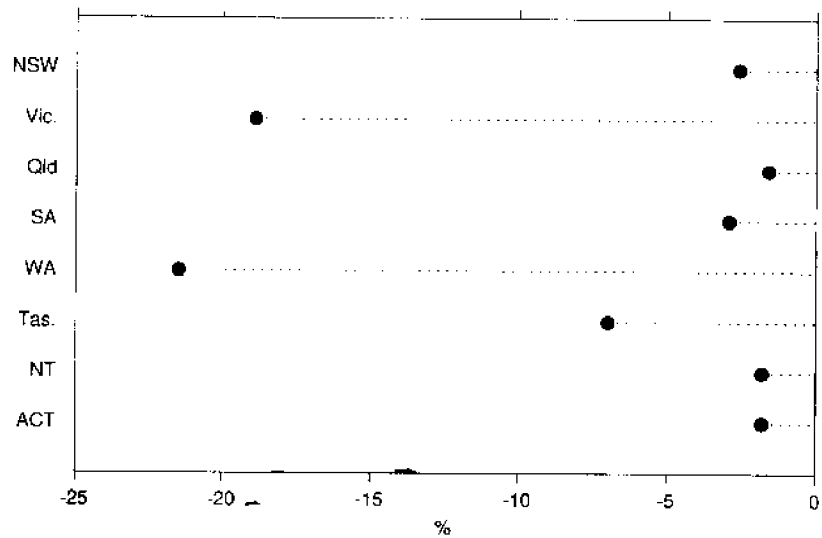
EMPLOYMENT

Total employment in management units classified as part of the electricity industry decreased from 48,089 persons at the end of June 1994 to 44,425 persons at the end of June 1995, a decline of 8%, with all States recording a decrease. Part of the reason for the decrease was restructuring, especially in Western Australia where previously included gas industry employees are now allocated to that industry. Employment in Western Australia fell by 1,009 persons (22%) at the end of June 1995. Similarly, restructuring in Victoria has been responsible for the decrease in employment of 1,783 persons (19%) to 7,672 persons at the end of the same period.

The labour ratio of industry gross product to employment, measured at \$205,800 per person in 1993-94, fell to \$193,500 per person in 1994-95.

EMPLOYMENT *continued*

Change in management unit employment—June 1994 and 1995



Total employment at establishment level decreased by 1,873 (4%) from 44,259 persons at the end of June 1994 to 42,386 persons at the end of June 1995. The largest falls in employment were recorded in Victoria, which fell by 736 (10%) to 6,916 persons and New South Wales which fell by 685 (4%) to 17,661 persons.

The level of administrative, office and sales employees fell by 4% to 14,409 persons at the end of June 1995. Production and all other employees accounted for 27,977 persons at the end of June 1995, down 5% on the previous year. At the end of June 1995 there were 5,412 persons engaged on new construction, a decrease of 15% on the previous year.

2.1 ELECTRICITY, Generation(a)(b)

Item	NSW m kWh	Vic. m kWh	Qld m kWh	SA(c) m kWh	WA m kWh	Tas. m kWh	Total m kWh
1991-92	55 566	38 305	28 923	10 026	14 626	8 968	156 413
1992-93	57 794	37 576	30 404	10 227	15 007	8 864	159 872
1993-94	57 792	37 019	31 831	10 560	15 755	8 855	161 813
1994-95	60 016	36 043	33 517	10 044	16 756	8 688	165 063

(a) Source: *Manufacturing Production, Australia: Energy Products* (Cat. no. 8368.0).

(b) Statistics relate to generation of electricity within each State and take no account of interchange between States. Details for Victoria exclude Victorian entitlements to generation from the Hume Power Station and the Snowy Mountains Hydro-electric Scheme which are both included in New South Wales.

(c) Includes the Northern Territory.

2.2 ELECTRICITY, Number of Customers—30 June 1995(a)

Item	NSW	Vic.	Qld	SA	WA	Tas.	NT	ACT	Total
Residential	2 372 174	1 735 723	1 223 711	616 298	615 921	198 663	49 545	112 762	6 924 797
Commercial	267 837	174 306	131 862	55 430	89 608	34 579	9 647	11 944	960 942
Industrial	4 001	88 397	55 141	30 812	956	6 422			
Other	28 889	3 937	128	1 616	149	212			
Total	2 672 901	2 002 363	1 410 842	704 156	706 634	239 876	59 226	124 715	7 920 713

(a) Source: Electricity Supply Association of Australia.

2.3 ELECTRICITY, Consumption—Year ended 30 June 1995(a)(b)

	NSW	Vic.	Qld	SA	WA	Tas.	NT	ACT	Total
Item	m kWh	m kWh	m kWh	m kWh	m kWh	m kWh	m kWh	m kWh	m kWh
Residential	16 077	8 933	7 727	3 375	2 937	1 751	331	1 041	42 172
Commercial	8 218	7 784	6 354	2 228	7 761	714	858	1 193	95 274
Industrial	23 807	15 570	11 645	3 582		5 560			
Other	1 546	547	771	71	75	20	13	38	3 081
Total	49 648	32 834	26 497	9 256	10 773	8 045	1 202	2 272	140 527

(a) Source: Electricity Supply Association of Australia.

(b) Figures do not include internal usage by supply authorities or consumption on unread meters at 30 June.

2.4 ELECTRICITY, Consumption Per Customer—Year ended 30 June 1995(a)(b)

	NSW	Vic.	Qld	SA	WA	Tas.	NT	ACT	Total
Item	'000 kWh	'000 kWh	'000 kWh	'000 kWh	'000 kWh	'000 kWh	'000 kWh	'000 kWh	'000 kWh
Residential	6.8	5.1	6.3	5.5	4.8	8.8	6.7	9.2	6.1
Commercial	30.7	44.7	48.2	40.2	85.7	20.6	88.9	99.9	99.1
Industrial	5 950.3	176.1	211.2	116.3		865.8			
Other	53.5	138.9	6 023.4	43.9	503.4	94.3	382.4	4 222.2	88.1
Total	18.6	16.4	18.8	13.1	15.2	33.5	20.3	18.2	17.7

(a) Source: Electricity Supply Association of Australia.

(b) Figures do not include internal usage by supply authorities or consumption on unread meters at 30 June.

2.5 ELECTRICITY, Consumption(a)(b) Per Population(c)—Year ended 30 June 1995

Item	NSW	Vic.	Qld	SA	WA	Tas.	NT	ACT	Total
	'000 kWh	'000 kWh	'000 kWh	'000 kWh	'000 kWh	'000 kWh	'000 kWh	'000 kWh	'000 kWh
Consumption per person	2.6	2.0	2.4	2.3	1.7	3.7	1.9	3.4	2.3

(a) Source: Electricity Supply Association of Australia.

(b) Figures do not include internal usage by supply authorities or consumption on unread meters at 30 June.

(c) Source: *Estimated Resident Population by Sex and Age: States and Territories of Australia* (Cat. no. 3201.0).

2.6 ELECTRICITY, Transmission and Distribution Systems—30 June 1995(a)

Item	NSW(b)	Vic.	Qld	SA	WA	Tas.	NT	ACT	Total
Overhead lines(c)	255 263	126 276	168 031	82 068	77 896	26 840	4 928	2 876	744 178
Underground cables(c)	22 903	6 696	7 853	8 191	4 474	1 541	867	1 981	54 506
Nominal MVA of transformers installed	78 932	42 912	30 601	15 184	15 260	7 825	1 746	2 700	195 160

(a) Source: Electricity Supply Association of Australia.

(b) Includes the Snowy Mountains.

(c) Circuit kilometres.

2.7 MANAGEMENT UNITS(a), Income and Expenditure—Trading Profit

Items	NSW.....		VIC.....		QLD.....		SA.....	
	1993-	1994-	1993-	1994-	1993-	1994-	1993-	1994-
	94	95	94	95	94	95	94	95
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Sales of goods and services	7 342.8	7 408.8	6 522.2	5 859.6	3 484.1	3 597.9	879.8	899.3
Less								
Purchases of goods and materials	3 735.5	3 843.4	3 607.4	2 689.6	1 638.1	1 975.8	181.3	176.0
Rent, leasing and hiring expenses								
Motor vehicles	0.3	0.4	12.2	10.1	0.1	0.1	0.4	1.4
Plant, machinery and other equipment	1.4	1.5	5.9	4.1	0.9	0.4	0.9	0.1
Land, buildings and other structures	3.6	4.8	4.0	5.7	5.6	6.9	1.0	0.9
Other rent, leasing and hiring	—	5.1	—	0.1	—	0.2	—	—
Outward freight and cartage	0.6	381.9	47.7	253.6	0.8	1.1	22.4	22.1
Motor vehicle expenses	44.4	40.8	14.0	13.9	13.6	12.8	5.7	17.3
Repair and maintenance expenses	181.1	168.6	72.5	96.5	66.9	74.2	24.0	14.6
Payment for contract, sub-contract and commission work	99.6	144.4	297.2	238.7	52.2	54.9	9.1	1.9
Other selected expenses	166.3	257.1	217.4	474.9	99.1	222.3	153.9	155.6
Purchases and selected expenses	4 232.8	4 847.9	4 278.4	3 787.1	1 877.4	2 348.6	398.7	389.8
Plus								
Opening stocks	445.9	430.6	54.2	119.4	100.7	59.7	76.7	67.9
Less								
Closing stocks	430.8	404.4	82.2	104.4	85.9	62.7	66.7	64.3
Cost of sales	4 248.0	4 874.2	4 250.4	3 802.1	1 892.2	2 345.6	408.6	393.3
Trading profit	3 094.8	2 534.6	2 271.8	2 057.5	1 591.9	1 252.3	471.2	506.0

Items	WA.....		TAS.....		NT.....		ACT.....		AUST.....	
	1993-	1994-	1993-	1994-	1993-	1994-	1993-	1994-	1993-	1994-
	94	95	94	95	94	95	94	95	94	95
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Sales of goods and services	1 756.8	1 543.2	454.9	470.1	213.9	240.7	313.6	316.4	20 968.0	20 336.0
Less										
Purchases of goods and materials	861.2	600.2	14.7	28.5	104.4	123.8	156.8	153.7	10 299.4	9 590.9
Rent, leasing and hiring expenses										
Motor vehicles	0.5	0.1	1.2	1.4	2.7	2.8	0.1	0.1	17.5	16.3
Plant, machinery and other equipment	0.9	8.9	0.8	0.7	1.3	1.2	0.7	1.4	12.7	18.3
Land, buildings and other structures	0.1	0.1	—	0.9	0.1	—	0.6	0.7	14.9	20.0
Other rent, leasing and hiring	—	—	—	—	—	—	—	—	—	5.4
Outward freight and cartage	—	30.0	—	0.3	0.1	0.1	—	0.2	71.6	689.2
Motor vehicle expenses	8.9	6.7	11.6	5.8	0.9	1.1	1.7	2.1	100.9	100.4
Repair and maintenance expenses	1.6	2.3	—	—	19.3	19.0	14.9	0.4	380.5	375.6
Payment for contract, sub-contract and commission work	12.7	3.6	2.5	17.5	12.4	13.4	7.5	18.3	493.2	492.7
Other selected expenses	36.7	142.9	5.9	45.3	13.6	14.7	4.4	18.0	697.4	1 330.8
Purchases and selected expenses	922.6	794.7	36.8	100.4	154.7	176.1	186.7	197.9	12 088.1	12 639.5
Plus										
Opening stocks	102.2	82.6	20.1	14.7	3.2	18.7	9.4	10.9	812.4	804.4
Less										
Closing stocks	82.6	109.8	14.7	13.7	3.0	21.6	10.9	11.5	776.8	792.3
Cost of sales	942.2	767.5	42.2	101.4	154.9	173.2	185.2	194.3	12 123.8	12 651.6
Trading profit	814.6	775.8	412.7	368.6	59.0	67.6	128.3	122.0	8 844.2	7 684.3

(a) See Explanatory Notes, 'Statistical units', paragraphs 14-19.

2.8 MANAGEMENT UNITS(a), Income and Expenditure—Operating Profit Before Tax

Items	NSW.....		VIC.....		QLD.....		SA.....	
	1993-	1994-	1993-	1994-	1993-	1994-	1993-	1994-
	94	95	94	95	94	95	94	95
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Trading profit	3 094.8	2 534.6	2 271.8	2 057.5	1 591.9	1 252.3	471.2	506.0
<i>Plus</i>								
Rent, leasing and hiring income	9.9	16.0	11.7	11.9	4.2	1.5	0.1	1.2
Government subsidies	3.6	2.8	2.3	0.1	0.3	27.7	0.3	0.3
Interest income	38.7	82.7	15.5	122.3	22.3	36.2	3.8	4.5
Other income	101.7	176.9	279.7	214.2	101.9	158.3	13.4	23.1
<i>Less</i>								
Wages and salaries	695.9	776.4	676.5	532.8	314.1	315.0	211.9	159.1
Superannuation	77.6	126.1	50.3	34.9	26.9	27.8	16.1	21.1
Workers' compensation	31.0	24.7	11.6	12.3	3.2	5.0	3.7	1.7
Selected labour costs	804.5	927.2	738.4	579.9	344.2	347.8	231.7	181.8
<i>Less</i>								
Depreciation	836.2	877.4	543.4	521.1	378.1	427.6	141.2	140.9
Insurance premiums	30.0	20.7	15.9	19.2	5.0	5.9	7.7	6.8
Royalties expenses	---	-	52.8	38.0	0.1	-	2.1	2.0
Bad debts	9.0	10.2	11.0	12.1	2.2	1.6	3.5	3.4
Earnings before interest and tax	1 569.0	977.5	1 219.5	1 235.6	991.0	692.9	102.8	200.1
<i>Less</i>								
Interest expenses	701.1	651.1	759.7	838.4	259.0	344.8	73.2	76.1
Operating profit before tax	867.9	326.4	459.7	397.3	732.1	348.1	29.6	124.0

Items	WA.....		TAS.....		NT.....		ACT.....		AUST.....	
	1993-	1994-	1993-	1994-	1993-	1994-	1993-	1994-	1993-	1994-
	94	95	94	95	94	95	94	95	94	95
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Trading profit	814.6	775.8	412.7	368.6	59.0	67.6	128.3	122.0	8 844.2	7 684.3
<i>Plus</i>										
Rent, leasing and hiring income	1.9	0.7	—	1.8	—	—	—	—	27.9	33.1
Government subsidies	8.6	9.6	—	1.2	40.3	37.8	7.3	7.7	62.8	87.3
Interest income	5.1	3.5	7.9	8.0	0.8	1.5	2.7	3.0	96.8	261.6
Other income	-5.6	12.2	7.0	13.1	7.5	8.8	3.6	4.2	509.2	610.8
<i>Less</i>										
Wages and salaries	160.6	180.8	131.2	75.1	38.4	38.0	53.8	62.5	2 282.4	2 139.7
Superannuation	20.3	6.1	26.0	24.3	4.2	5.0	7.0	6.9	228.4	252.1
Workers' compensation	2.1	2.2	2.0	2.2	0.1	—	7.2	3.2	60.9	51.3
Selected labour costs	183.0	189.1	159.2	101.6	42.8	43.0	68.0	72.7	2 571.7	2 443.2
<i>Less</i>										
Depreciation	175.9	156.6	94.2	96.7	33.7	51.7	39.9	41.4	2 242.5	2 313.4
Insurance premiums	7.5	7.3	2.2	2.8	2.7	2.4	0.6	1.1	71.5	66.1
Royalties expenses	---	—	—	—	—	—	—	—	54.9	40.0
Bad debts	2.6	3.3	2.2	2.4	1.5	0.5	0.3	0.3	32.4	33.9
Earnings before interest and tax	455.5	445.6	189.7	189.2	26.9	18.1	33.2	21.5	4 567.7	3 780.6
<i>Less</i>										
Interest expenses	368.5	283.9	181.5	188.8	31.4	22.6	10.0	9.1	2 384.4	2 414.9
Operating profit before tax	87.1	161.7	-11.8	0.4	-4.5	-4.5	23.2	12.4	2 183.3	1 365.7

(a) See Explanatory Notes, 'Statistical units', paragraphs 14-19.

2.9 MANAGEMENT UNITS(a), Industry Gross Product

Items	NSW.....		VIC.....		QLD.....		SA.....	
	1993- 94	1994- 95	1993- 94	1994- 95	1993- 94	1994- 95	1993- 94	1994- 95
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Sales of goods and services	7 342.8	7 408.8	6 522.2	5 859.6	3 484.1	3 597.9	879.8	899.3
Rent, leasing and hiring income	9.9	16.0	11.7	11.9	4.2	1.5	0.1	1.2
Government subsidies	3.6	2.8	2.3	0.1	0.3	27.7	0.3	0.3
<i>Plus</i>								
Capital work done for own use	313.9	380.0	240.2	109.8	190.2	207.4	71.3	11.2
Turnover	7 670.2	7 807.6	6 776.4	5 981.4	3 678.8	3 834.4	951.6	912.0
<i>Plus</i>								
Closing stocks	430.8	404.4	82.2	104.4	85.9	62.7	66.7	64.3
<i>Less</i>								
Opening stocks	445.9	430.6	54.2	119.4	100.7	59.7	76.7	67.9
<i>Less</i>								
Purchases and selected expenses	4 232.8	4 847.9	4 278.4	3 787.1	1 877.4	2 348.6	398.7	389.8
Industry gross product	3 422.3	2 933.4	2 526.0	2 179.3	1 786.6	1 488.8	543.0	518.7

Items	WA.....		TAS.....		NT.....		ACT.....		AUST.....	
	1993- 94	1994- 95	1993- 94	1994- 95	1993- 94	1994- 95	1993- 94	1994- 95	1993- 94	1994- 95
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Sales of goods and services	1 756.8	1 543.2	454.9	470.1	213.9	240.7	313.6	316.4	20 968.0	20 336.0
Rent, leasing and hiring income	1.9	0.7	—	1.8	—	—	—	—	27.9	33.1
Government subsidies	8.6	9.6	—	1.2	40.3	37.8	7.3	7.7	62.8	87.3
<i>Plus</i>										
Capital work done for own use	113.5	41.5	33.8	24.9	—	—	—	14.7	962.9	789.5
Turnover	1 880.8	1 595.1	488.7	497.9	254.2	278.5	320.9	338.7	22 021.6	21 245.8
<i>Plus</i>										
Closing stocks	82.6	109.8	14.7	13.7	3.0	21.6	10.9	11.5	776.8	792.3
<i>Less</i>										
Opening stocks	102.2	82.6	20.1	14.7	3.2	18.7	9.4	10.9	812.4	804.4
<i>Less</i>										
Purchases and selected expenses	922.6	794.7	36.8	100.4	154.7	176.1	186.7	194.9	12 088.1	12 639.5
Industry gross product	938.6	827.6	446.4	396.5	99.3	105.3	135.7	144.4	9 897.8	8 594.1

(a) See Explanatory Notes, 'Statistical units', paragraphs 14-19.

2.10 MANAGEMENT UNITS(a), Assets and Liabilities

Items	NSW.....		VIC.....		QLD.....		SA.....	
	1993- 94	1994- 95	1993- 94	1994- 95	1993- 94	1994- 95	1993- 94	1994- 95
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Assets								
Current assets								
Closing stocks	430.8	404.4	82.2	104.4	85.9	62.7	66.7	64.3
Other current assets	1 726.0	1 615.5	6 021.9	5 919.9	660.8	1 041.2	262.2	144.3
Non-current assets	20 913.9	19 614.6	11 655.6	12 058.3	10 930.1	11 948.4	2 257.9	2 218.7
<i>Total value of assets</i>	23 070.7	21 634.5	17 759.6	18 082.6	11 676.8	13 052.3	2 586.7	2 427.4
Liabilities								
Current liabilities	1 934.9	2 163.9	4 780.3	8 407.2	689.3	923.2	294.8	213.8
Non-current liabilities	6 803.1	6 094.0	9 596.6	7 250.4	3 004.0	4 143.5	752.3	750.7
<i>Total value of liabilities</i>	8 738.0	8 257.9	14 376.9	15 657.6	3 693.4	5 066.7	1 047.1	964.6
Net worth	14 332.7	13 376.6	3 382.7	2 425.0	7 983.4	7 985.6	1 539.6	1 462.8

Items	WA.....		TAS.....		NT.....		ACT.....		AUST.....	
	1993- 94	1994- 95	1993- 94	1994- 95	1993- 94	1994- 95	1993- 94	1994- 95	1993- 94	1994- 95
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Assets										
Current assets										
Closing stocks	82.6	109.8	14.7	13.7	3.0	21.6	10.9	11.5	776.8	792.3
Other current assets	233.1	222.0	190.6	201.3	34.5	65.1	57.1	57.5	9 186.1	9 266.9
Non-current assets	4 253.3	2 842.8	3 883.2	3 890.8	566.8	1 043.8	1 464.4	1 484.1	55 925.0	55 101.5
<i>Total value of assets</i>	4 568.9	3 174.6	4 088.5	4 105.8	604.3	1 130.5	1 532.4	1 553.1	65 888.0	65 160.7
Liabilities										
Current liabilities	126.2	147.6	465.7	426.8	39.6	56.3	56.7	79.8	8 387.6	12 418.5
Non-current liabilities	3 938.7	2 425.5	1 610.2	1 616.4	281.0	266.1	85.4	76.2	26 071.3	22 622.9
<i>Total value of liabilities</i>	4 064.9	2 573.1	2 075.9	2 043.3	320.6	322.4	142.1	155.9	34 458.9	35 041.4
Net worth	504.0	601.5	2 012.6	2 062.5	283.7	808.1	1 390.3	1 397.2	31 429.0	30 119.3

(a) See Explanatory Notes, 'Statistical units', paragraphs 14-19.

2.11 MANAGEMENT UNITS(a), Acquisitions and Disposals of Fixed Tangible Assets

Items	NSW.....		VIC.....		QLD.....		SA.....	
	1993-	1994-	1993-	1994-	1993-	1994-	1993-	1994-
	94	95	94	95	94	95	94	95
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Capital expenditure on								
Land	1.6	5.7	2.1	9.5	0.5	2.1	0.3	0.3
Dwellings	31.0	29.5	—	—	0.1	11.4	—	1.6
Other buildings and structures	493.8	352.8	711.0	233.9	193.7	206.3	0.6	0.1
Plant, machinery and equipment	150.5	282.0	31.0	156.0	385.2	301.3	101.5	80.7
<i>Total acquisitions</i>	676.9	670.0	744.1	399.4	579.4	521.1	102.4	82.6
Disposal of assets	118.4	81.2	39.1	21.7	52.9	19.9	13.0	11.2
Net capital expenditure	558.5	588.8	705.0	377.7	526.5	501.2	89.3	71.5

Items	WA.....		TAS.....		NT.....		ACT.....		AUST.....	
	1993-	1994-	1993-	1994-	1993-	1994-	1993-	1994-	1993-	1994-
	94	95	94	95	94	95	94	95	94	95
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Capital expenditure on										
Land	0.3	0.9	—	—	—	—	—	0.2	4.8	18.7
Dwellings	—	0.2	4.3	3.0	—	—	2.7	1.8	38.0	47.4
Other buildings and structures	113.4	58.7	69.4	36.0	—	—	33.4	40.5	1 615.3	928.3
Plant, machinery and equipment	24.5	102.2	14.9	30.1	27.4	42.9	19.4	11.6	754.4	1 006.7
<i>Total acquisitions</i>	138.2	161.9	88.6	69.1	27.4	42.9	55.6	54.0	2 412.5	2 001.1
Disposal of assets	11.4	7.8	10.4	12.0	0.4	0.1	2.3	2.0	247.9	155.8
Net capital expenditure	126.9	154.1	78.1	57.2	27.0	42.8	53.3	52.0	2 164.6	1 845.3

(a) See Explanatory Notes, 'Statistical units', paragraphs 14–19.

2.12 MANAGEMENT UNITS(a), Selected Performance Measures

Items	Unit	NSW.....		VIC.....		QLD.....		SA.....		
		1993-94	1994-95	1993-94	1994-95	1993-94	1994-95	1993-94	1994-95	
Turnover										
Asset turnover	%	0.3	0.3	0.4	0.3	0.3	0.3	0.3	0.4	
Profitability										
Trading profit margin	%	42.2	34.2	34.8	35.1	45.7	34.8	53.6	56.3	
Return on funds	%	7.4	5.0	9.4	12.8	9.0	5.7	4.5	9.0	
Return on assets	%	3.8	1.5	2.6	2.2	6.3	2.7	1.2	5.3	
Liquidity										
Liquidity ratio	times	0.9	0.8	1.3	0.7	1.0	1.1	0.9	0.7	
Current ratio	times	1.1	0.9	1.3	0.7	1.1	1.2	1.1	0.7	
Debt										
Interest coverage ratio	times	2.2	1.5	1.6	1.5	3.8	2.0	1.4	2.6	
Debt to assets	%	38.6	38.9	81.3	87.1	31.9	39.0	41.6	40.8	
Capital expenditure										
Acquisitions to disposals ratio	times	5.7	8.3	19.0	18.1	10.9	26.2	7.9	7.4	
Net capital expenditure to assets	%	2.5	2.8	4.0	2.1	4.5	3.9	3.6	3.0	

Items	Unit	WA.....		TAS.....		NT.....		ACT.....		AUST.....	
		1993-94	1994-95	1993-94	1994-95	1993-94	1994-95	1993-94	1994-95	1993-94	1994-95
Turnover											
Asset turnover	%	0.4	0.5	0.1	0.1	0.4	0.2	0.2	0.2	0.3	0.3
Profitability											
Trading profit margin	%	46.4	50.3	90.7	78.4	27.6	28.1	40.9	38.6	42.2	37.8
Return on funds	%	10.3	14.7	4.7	5.1	4.8	1.7	2.3	1.5	7.9	7.2
Return on assets	%	1.9	5.3	-0.3	0.0	-0.7	-0.4	1.5	0.8	3.4	2.1
Liquidity											
Liquidity ratio	times	1.9	1.5	0.4	0.5	0.9	1.2	1.0	0.7	1.1	0.8
Current ratio	times	2.5	2.3	0.4	0.5	1.0	1.5	1.2	0.9	1.2	0.8
Debt											
Interest coverage ratio	times	1.2	1.6	0.9	1.0	0.9	0.8	3.3	2.4	1.9	1.6
Debt to assets	%	90.6	84.0	51.0	49.9	53.3	29.1	9.3	10.1	52.9	54.4
Capital expenditure											
Acquisitions to disposals ratio	times	12.1	20.7	8.5	5.8	68.0	456.6	24.0	26.5	9.7	12.8
Net capital expenditure to assets	%	2.8	5.0	1.9	1.4	4.5	3.9	3.5	3.4	3.3	2.9

(a) See Explanatory Notes, 'Statistical units', paragraphs 14-19.

2.13 ESTABLISHMENT LEVEL(a), Income and Expenditure

Items	NSW.....		VIC.....		QLD.....		SA.....			
	1993- 94	1994- 95	1993- 94	1994- 95	1993- 94	1994- 95	1993- 94	1994- 95	1993- 94	1994- 95
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Sales of electricity(b)	7 248.1	6 916.4	6 168.0	5 292.9	3 449.7	3 361.8			872.9	889.0
Sales of other goods(b)	64.3	60.7	4.8	6.2	18.8	58.4			3.6	3.9
Service income	81.1	431.7	280.1	536.9	53.0	219.3			6.0	9.0
Rent, leasing and hiring income	9.9	16.0	9.1	10.0	4.3	1.3			0.1	0.1
Government subsidies	3.6	2.8	2.2	2.5	1.5	29.1			0.3	0.3
<i>Plus</i>										
Capital work done for own use	313.9	380.0	236.9	105.3	190.3	207.4			71.3	11.2
Turnover	7 720.9	7 807.6	6 701.1	5 953.9	3 717.6	3 877.3			954.3	913.6
<i>Plus</i>										
Closing stocks	432.8	404.4	49.1	96.3	89.6	65.1			65.0	53.9
<i>Less</i>										
Opening stocks	447.9	430.6	64.7	112.7	105.0	62.2			74.5	65.0
<i>Less</i>										
Purchases and selected expenses	4 121.7	4 594.9	4 198.5	3 574.6	1 858.1	2 221.8			295.5	314.7
Value added	3 584.1	3 186.4	2 487.0	2 362.8	1 844.0	1 658.4			649.4	587.7
.....										
	WA.....		TAS.....		NT.....		ACT.....		AUST.....	
	1993- 94	1994- 95	1993- 94	1994- 95	1993- 94	1994- 95	1993- 94	1994- 95	1993- 94	1994- 95
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Sales of electricity(b)	1 216.6	1 255.1	445.2	461.8	261.5	264.3	222.9	222.9	19 884.8	18 664.1
Sales of other goods(b)	—	—	—	—	2.2	0.7	0.5	0.1	94.2	130.1
Service income	6.8	16.1	9.7	8.3	0.9	4.4	12.7	11.5	450.2	1 237.2
Rent, leasing and hiring income	—	0.7	—	1.8	—	—	—	—	23.4	29.9
Government subsidies	—	3.6	—	1.2	24.6	19.2	—	—	32.3	58.8
<i>Plus</i>										
Capital work done for own use	92.4	38.3	33.8	24.9	—	—	17.4	9.2	956.0	776.3
Turnover	1 315.7	1 313.8	488.7	497.9	289.2	288.6	253.5	243.7	21 441.0	20 896.4
<i>Plus</i>										
Closing stocks	78.8	109.8	14.7	13.7	13.5	13.1	8.2	6.9	751.7	763.0
<i>Less</i>										
Opening stocks	97.6	78.8	20.1	14.7	13.6	13.5	6.0	6.6	829.5	784.2
<i>Less</i>										
Purchases and selected expenses	550.7	588.9	30.9	55.0	182.2	172.6	166.6	158.9	11 404.1	11 681.4
Value added	746.2	755.9	452.4	441.8	106.8	115.6	89.1	85.1	9 959.0	9 193.8

(a) See Explanatory Notes, 'Statistical units', paragraphs 14-19.

(b) Includes transfers out to other establishments of the same management unit where appropriate.

2.14 ESTABLISHMENT LEVEL(a). Purchases and Selected Expenses

Items	NSW.....		VIC.....		QLD.....		SA.....	
	1993- 94	1994- 95	1993- 94	1994- 95	1993- 94	1994- 95	1993- 94	1994- 95
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Purchases								
Materials, components, containers etc.(b)(c)	67.7	326.3	496.3	492.0	25.1	235.1	114.3	97.6
Fuels	743.7	757.1	132.7	81.7	382.3	384.4	130.0	1.8
Electricity	2 911.1	2 721.8	3 283.1	2 354.9	1 254.6	1 325.7	18.6	37.0
Gas (as a fuel)(d)	—	—	—	68.6	—	—	—	124.9
Goods for resale(b)	47.0	38.2	1.4	0.0	14.6	65.3	—	—
Rent, leasing and hiring expenses								
Motor vehicles	0.4	0.4	7.9	8.8	0.3	0.3	0.4	0.3
Plant, machinery and other equipment	1.8	1.5	2.5	4.0	1.0	0.8	0.2	0.3
Land, buildings and other structures	3.6	4.8	4.0	5.7	5.6	6.6	1.0	0.9
Other rent, leasing and hiring	—	5.1	—	0.1	—	0.2	—	—
Outward freight and cartage	0.6	381.9	47.8	255.6	0.8	1.1	0.1	21.9
Motor vehicle expenses	44.4	40.8	11.7	12.7	13.7	12.8	5.3	14.9
Repair and maintenance expenses	187.9	168.6	6.9	63.6	71.6	78.6	14.2	12.3
Payment for contract, sub-contract and commission work	99.6	144.4	204.1	226.9	56.1	59.4	9.2	0.9
Subsidy expenses	14.0	4.1	—	—	32.3	51.6	2.2	1.9
Purchases and selected expenses	4 121.7	4 594.9	4 198.5	3 574.6	1 858.1	2 221.8	295.5	314.7

Items	WA.....		TAS.....		NT.....		ACT.....		AUST.....	
	1993- 94	1994- 95	1993- 94	1994- 95	1993- 94	1994- 95	1993- 94	1994- 95	1993- 94	1994- 95
	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m	\$m
Purchases										
Materials, components, containers etc.(b)(c)	167.6	131.7	10.7	26.4	3.4	3.3	6.7	9.4	891.8	1 321.6
Fuels	342.8	240.2	2.1	1.9	131.6	68.0	0.4	—	1 865.6	1 535.1
Electricity	28.5	42.6	1.9	0.1	9.6	0.1	149.3	136.5	7 656.6	6 618.6
Gas (as a fuel)(d)	—	123.0	—	—	—	66.7	—	0.1	—	383.3
Goods for resale(b)	—	—	—	—	1.8	0.2	0.4	0.1	65.2	103.9
Rent, leasing and hiring expenses										
Motor vehicles	0.4	0.1	1.2	1.4	1.2	1.2	—	0.1	12.0	12.5
Plant, machinery and other equipment	0.8	8.2	0.8	0.7	1.3	0.4	0.4	0.8	8.8	16.7
Land, buildings and other structures	0.1	0.1	—	0.9	0.5	—	0.4	0.4	15.2	19.4
Other rent, leasing and hiring	—	—	—	—	—	0.4	—	—	—	5.9
Outward freight and cartage	—	30.0	—	0.3	0.1	0.1	—	0.1	49.3	690.9
Motor vehicle expenses	7.7	6.1	11.6	5.8	0.5	0.5	1.0	1.2	95.9	94.8
Repair and maintenance expenses	0.4	2.3	—	—	17.3	14.5	3.8	0.2	301.9	340.2
Payment for contract, sub-contract and commission work	2.4	4.7	2.5	17.5	15.1	12.1	4.2	10.0	393.2	475.9
Subsidy expenses	—	—	—	—	—	5.1	—	—	48.6	62.7
Purchases and selected expenses	550.7	588.9	30.9	55.0	182.2	172.6	166.6	158.9	11 404.1	11 681.4

(a) See Explanatory Notes, 'Statistical units', paragraphs 14-19.

(b) Includes transfers in from other establishments of the same management unit.

(c) Includes minerals for further processing.

(d) 1993-94 gas as a fuel included in 'Fuels'.

2.15 MANAGEMENT UNITS(a), Employment at end of June

Items	Unit	NSW.....		VIC.....		QLD.....		SA.....			
		1993-94	1994-95	1993-94	1994-95	1993-94	1994-95	1993-94	1994-95		
Management units(a) at 30 June	no.	27	28	17	16	15	17	4	4		
Employment at end of June	no.	18 136	17 661	9 455	7 672	8 353	8 221	3 300	3 205		
Persons employed per management unit	no.	671.7	630.8	556.2	479.5	556.9	483.6	825.0	801.3		
Labour ratios											
Profit to employment	\$'000/ employee	47.9	18.5	48.6	51.8	87.6	42.4	9.0	38.7		
Industry gross product To employment	\$'000/ employee	188.7	166.1	267.2	284.1	213.9	181.1	164.5	161.8		
To selected labour costs	times	4.3	3.2	3.4	3.8	5.2	4.3	2.3	2.9		
Selected labour costs To employment	\$'000/ employee	44.4	52.5	78.1	75.6	41.2	42.3	70.2	56.7		
WA..... TAS..... NT..... ACT..... AUST.....											
Items	Unit	1993-94	1994-95	1993-94	1994-95	1993-94	1994-95	1993-94	1994-95	1993-94	1994-95
		94	95	94	95	94	95	94	95	94	95
Management units(a) at 30 June	no.	3	3	1	1	1	1	1	1	69	71
Employment at end of June	no.	4 687	3 678	1 849	1 720	935	918	1 374	1 350	48 089	44 425
Persons employed per management unit	no.	1 562.3	1 226.0	1 849.0	1 720.0	935.0	918.0	1 374.0	1 350.0	696.9	625.7
Labour ratios											
Profit to employment	\$'000/ employee	18.6	44.0	-6.4	0.2	-4.8	-4.9	16.9	9.2	45.4	30.7
Industry gross product To employment	\$'000/ employee	200.3	225.0	241.5	230.5	106.2	114.8	98.8	107.0	205.8	193.5
To selected labour costs	times	5.1	4.4	2.8	3.9	2.3	2.5	2.0	2.0	3.9	3.5
Selected labour costs To employment	\$'000/ employee	39.0	51.4	86.1	59.1	45.8	46.8	49.5	53.8	53.5	55.0

(a) See Explanatory Notes, 'Statistical Units', paragraphs 14-19.

2.16 ESTABLISHMENT LEVEL(a), Employment at end of June

Items	Unit	NSW.....		VIC.....		QLD.....		SA.....	
		1993-94	1994-95	1993-94	1994-95	1993-94	1994-95	1993-94	1994-95
Establishments(a) at 30 June	no.	28	28	23	19	17	19	5	5
Employment at end of June									
Males	no.	16 188	15 401	6 902	6 239	7 211	6 920	2 623	2 542
Females	no.	2 158	2 260	750	677	1 289	1 397	261	264
Total	no.	18 346	17 661	7 652	6 916	8 500	8 317	2 884	2 806
Persons employed per establishment	no.	655.2	630.8	332.7	364.0	500.0	437.7	576.8	561.2
Employment type									
Administrative, office and sales	no.	5 019	4 476	2 653	2 671	3 445	3 077	586	667
Production and all other employees	no.	13 327	13 185	4 999	4 245	5 055	5 240	2 298	2 139
Employees engaged on new construction	no.	1 954	2 319	2 130	967	1 636	1 529	441	13
Wages and salaries									
All employees	\$m	700.3	776.4	485.4	468.1	324.3	323.5	186.8	127.9
Employees engaged on new construction	\$m	76.0	83.5	91.7	51.3	57.0	46.8	21.2	0.7

WA..... TAS..... NT..... ACT..... AUST.....

Items	Unit	1993-94	1994-95	1993-94	1994-95	1993-94	1994-95	1993-94	1994-95	1993-94	1994-95
		Establishments(a) at 30 June	no.	3	4	1	1	3	3	1	1
Employment at end of June											
Males	no.	3 450	3 302	1 597	1 498	473	443	626	606	39 070	36 951
Females	no.	244	376	252	222	98	106	137	133	5 189	5 435
Total	no.	3 694	3 678	1 849	1 720	571	549	763	739	44 259	42 386
Persons employed per establishment	no.	1 231.3	919.5	1 849.0	1 720.0	190.3	183.0	763.0	739.0	546.4	529.8
Employment type											
Administrative, office and sales	no.	1 373	1 764	1 208	1 221	283	274	351	259	14 918	14 409
Production and all other employees	no.	2 321	1 914	641	499	288	275	412	480	29 341	27 977
Employees engaged on new construction	no.	—	7	8	381	64	26	166	170	6 399	5 412
Wages and salaries											
All employees	\$m	129.4	169.6	131.2	75.1	26.0	24.3	30.0	35.8	2 013.4	2 000.7
Employees engaged on new construction	\$m	—	0.1	33.8	4.7	2.0	1.1	6.3	7.1	288.1	195.4

(a) See Explanatory Notes, 'Statistical Units', paragraphs 14-19.

CHAPTER 3

GAS INDUSTRY

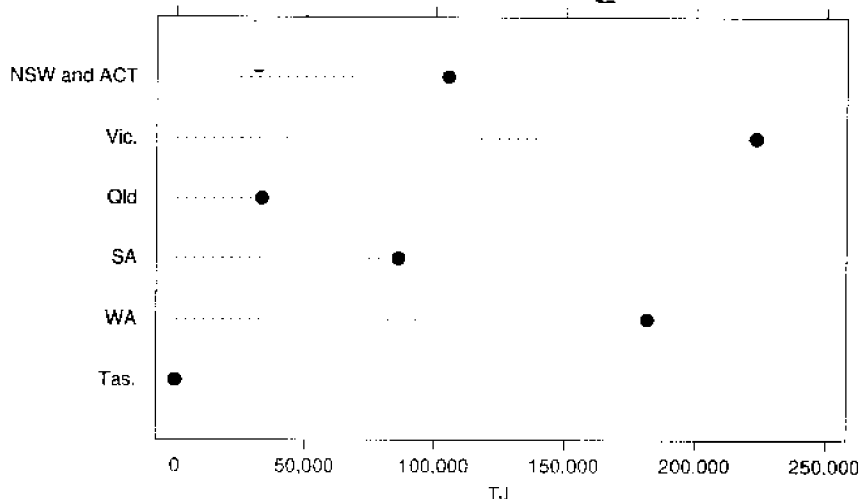
INTRODUCTION

The gas industry has recently witnessed the corporatisation of State-owned enterprises and the privatisation of pipelines. The industry is becoming ever more competitive as it faces the challenges of regulatory reform and decisions on major new capital investments. Some of these changes are reflected in the data collected through the census of gas operations. For example, the divestment of gas operations from electricity industry management unit data in Western Australia halfway through the reference period has resulted in some of the differences between management unit data reported in 1993-94 and 1994-95.

OUTPUT

In 1994-95, gas establishments had 629,406 TJ of gas available for issue through mains compared with 586,776 TJ in 1993-94, an increase of 7%.

Gas availability(a)



(a) Excludes the Northern Territory.

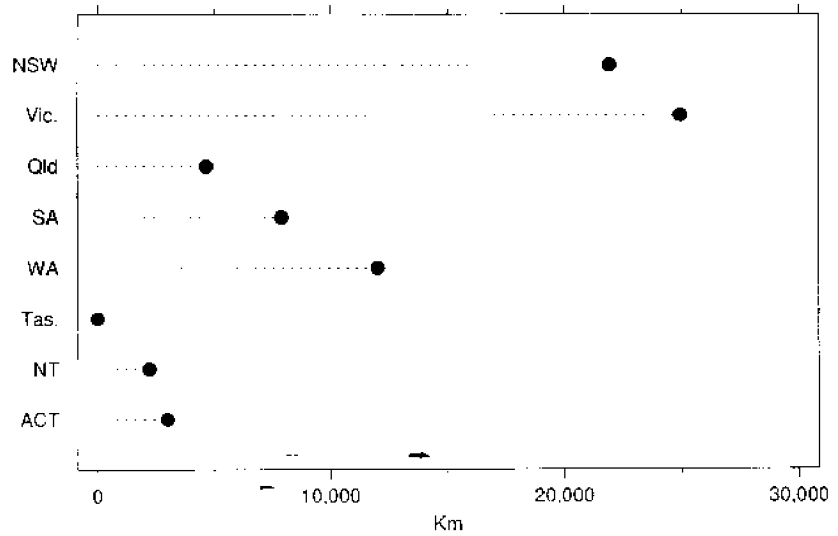
RETICULATION

The length of reticulation and transmission lines laid in 1994-95 was 2,647 kilometres, 8% more than the 2,458 kilometres laid in 1993-94.

The national natural gas and reticulation system extended to 76,352 kilometres in 1994-95. New South Wales and Victoria had the largest networks with 29% and 32% of the total number of kilometres of lines respectively.

RETICULATION *continued*

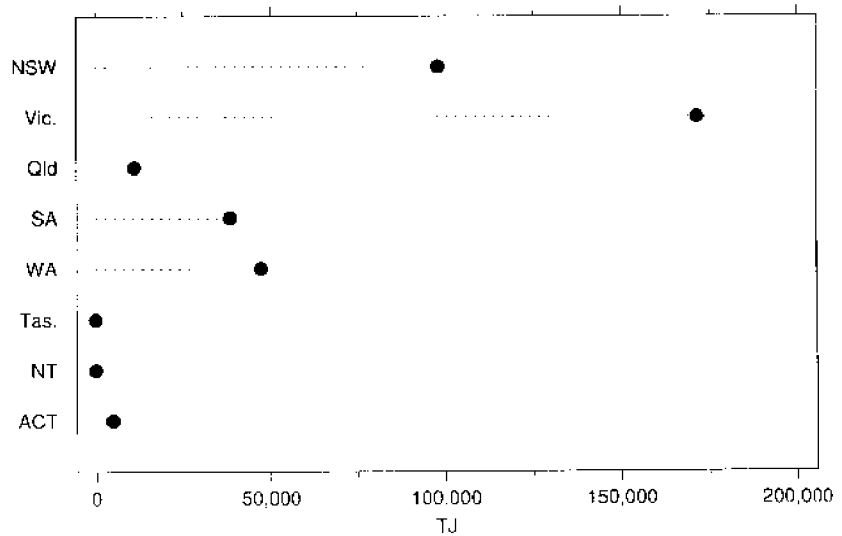
Reticulation and transmission mains in use



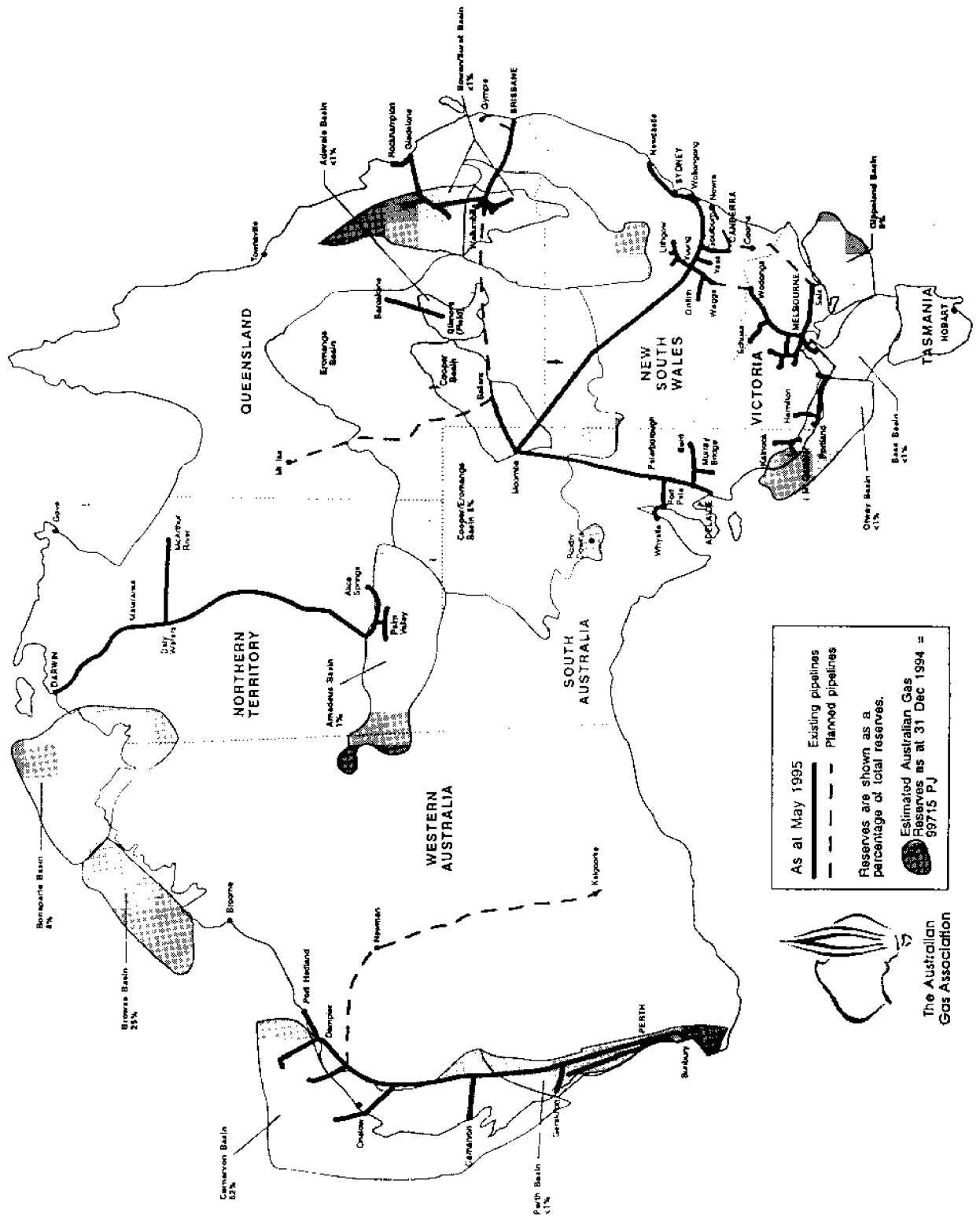
CONSUMPTION

The reported volume of natural gas sold in 1994-95 was 371,493 TJ, which suggests a decrease of 12%. However, this fall in sales is caused by the exclusion of sales by the North West Shelf gas producers. The disaggregation of the Domgas contract enabled North West Shelf producers to enter into direct contracts with customers from 1 January 1995. The gas, previously supplied by the State Electricity Commission of Western Australia, has been excluded in order to facilitate future comparisons. With the exception of Western Australia, all States recorded an increase in gas sales.

Sales



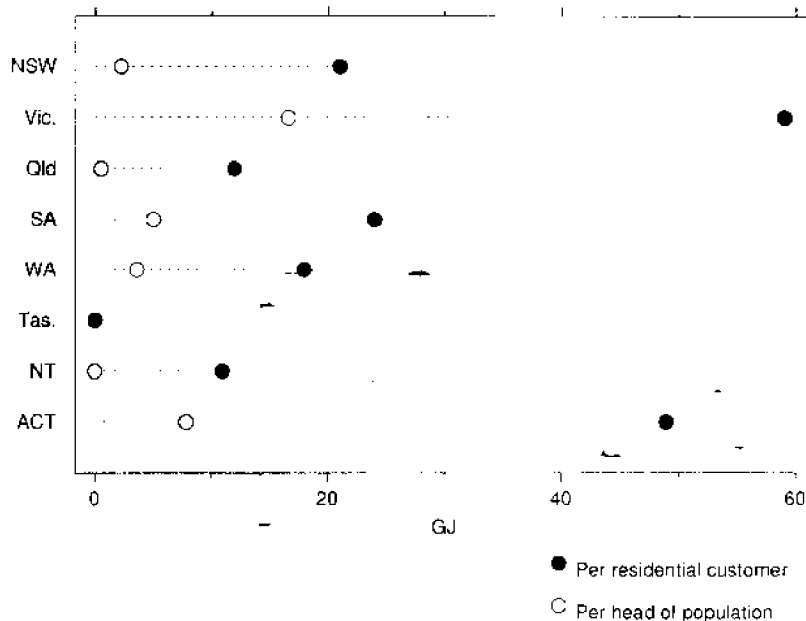
Location of Natural Gas Reserves and Natural Gas Transmission Pipelines Australia 1995



CONSUMPTION *continued*

Across the States, Victoria recorded the highest residential consumption of gas per head of population (17 GJ) in 1994–95. The Australian Capital Territory with 8 GJ per head of population and South Australia with 5 GJ per head of population were the next highest users. Sales of gas in Victoria accounted for 46% of the total revenue in 1994–95, an increase over its previous year's share of 37%.

Residential consumption



There has been growth in both the residential and commercial consumption of gas since the introduction of gas to the Australian market in 1969. Natural gas is now the third largest domestic primary energy supply source after oil and coal (Australian Gas Association, Annual Report 1995).

TRADING PROFIT

Total trading profit in 1994–95 was \$799m, a decrease of \$45m, or 5% on the 1993–94 figure. Revenue generated by sales of goods and services increased by \$317m (13%) to \$2,720m but was offset by an increase of \$362m (23%) in cost of sales. An increase in the value of purchases of goods and materials, up \$242m to \$1,224m in 1994–95, and an increase in 'other selected expenses', up \$82m to \$546m in the same period, are the primary reasons for the decrease in trading profit.

EARNINGS BEFORE INTEREST AND TAX

Earnings before interest and tax (a measure of profit prior to the deduction of interest expenses and income tax) decreased from \$413m in 1993-94 to \$370m in 1994-95, a decrease of 10%. During 1994-95 'other income' fell by \$20m to \$18m and superannuation expenses decreased by \$7m to \$21m. The latter is a reflection of the decrease in the total work force during 1994-95.

OPERATING PROFIT BEFORE TAX

Operating profit before tax (OPBT) is calculated by deducting the cost of interest expenses from earnings before interest and tax. The downward movement of the other indicators was reflected in OPBT which decreased from \$327m in 1993-94 to \$317m in 1994-95, a fall of 3%.

TURNOVER

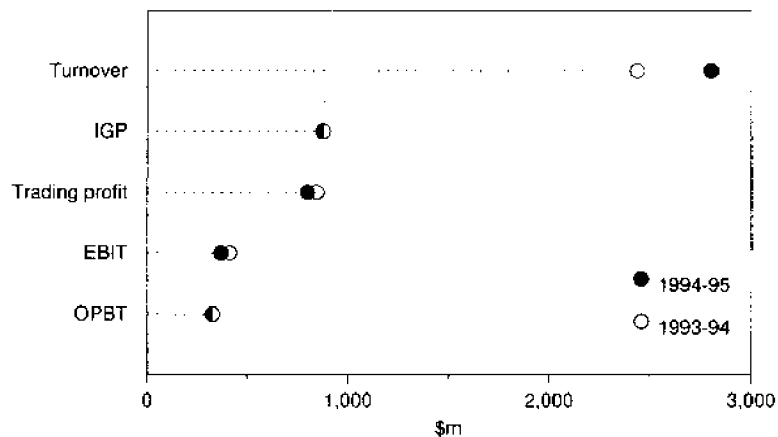
National turnover at the management unit level increased by \$366m (15%) from \$2,437m in 1993-94 to \$2,803m in 1994-95.

In 1994-95 sales of gas increased 13% to \$2,720m and accounted for 97% of the total turnover figure.

INDUSTRY GROSS PRODUCT

The industry gross product rose by \$4m (less than 1%) from \$878m in 1993-94 to \$882m in 1994-95. Purchases and selected expenses increased to \$1,914m (up 23%) in 1994-95.

Selected indicators



NET WORTH

Net worth increased by \$400m (34%) from \$1,183m in 1993-94 to \$1,583m in 1994-95. The increase was mainly due to a decrease in the value of liabilities which fell by \$394m in 1994-95.

NET CAPITAL EXPENDITURE

Total net capital expenditure decreased by \$25m (10%) from \$241m in 1993-94 to \$216m in 1994-95. This decrease was attributable to expenditure on plant machinery and equipment which decreased by \$50m to \$124m and total acquisitions which fell by \$34m (13%), in 1994-95.

PERFORMANCE MEASURES

Some of the main features for performance measures in 1994-95 were:

- trading profit margin decreased from 35% to 29%;
- acquisition to disposals ratio increased from 11.4 to 16.3;
- debts to assets decreased from 62% to 48%; and
- return on funds decreased from 17% to 15%.

ESTABLISHMENT DETAILS

Turnover at the establishment level increased 6% from \$3,133m in 1993-94 to \$3,334m in 1994-95. The primary contributor to the increase was a \$125m (4%) rise in the value of sales of gas and gas by-products to \$2,994m in 1994-95.

Value added at establishment level increased 2% from \$1,635m in 1993-94 to \$1,675m in 1994-95.

EMPLOYMENT

Total employment at the management unit level decreased from 7,074 persons at the end of June 1994 to 6,738 persons at the end of June 1995. This represents a fall of 5%.

The ratio of selected labour costs to employment rose from \$47,500 per employee in 1993-94 to \$48,200 per employee in 1994-95.

Industry gross product to employment ratio rose from \$124,200 per employee in 1993-94 to \$130,900 per employee in 1994-95.

Total employment at establishment level decreased by 591 persons (8%) from 7,685 persons at the end of June 1994 to 7,094 persons at the end of June 1995.

Administrative, office and sales employees totalled 3,955 persons or 56% of the total number of employees.

3.1 GAS AVAILABILITY(a)

GAS AVAILABLE FOR ISSUE THROUGH MAINS.....

Period	NSW(b)	Vic.	Qld	SA	WA	Tas.	NT	Aust.
	TJ	TJ	TJ	TJ	TJ	TJ	TJ	TJ
1990-91	95 130	194 737	26 357	73 265	146 635	68	—	536 193
1991-92	95 299	202 699	27 634	78 210	149 534	63	—	553 438
1992-93	96 215	207 131	26 746	83 000	155 667	61	—	568 820
1993-94	97 318	196 533	31 055	89 382	172 432	56	—	586 776
1994-95	104 881	223 269	33 372	86 121	181 710	52	—	629 406

(a) Source: *Manufacturing Production, Australia, Energy Products* (Cat. no. 8368.0).

(b) Includes the Australian Capital Territory.

3.2 NATURAL GAS, Kilometres of Mains Laid(a)

RETICULATION AND TRANSMISSION LINES(b).....

State/Territory	1990-91	1991-92	1992-93	1993-94	1994-95
	km	km	km	km	km
New South Wales	563	637	794	(c)1 313	966
Victoria	330	270	541	353	433
Queensland	159	91	105	168	359
South Australia	106	93	131	191	195
Western Australia	318	193	260	298	248
Tasmania	—	—	—	—	—
Northern Territory	4	—	1	4	327
Australian Capital Territory	(d)	(d)	(d)	132	118
Australia	1 479	1 284	1 832	2 458	2 647

(a) Source: The Australian Gas Association Survey.

(b) Includes pipeliners and utilities distributing natural gas.

(c) Excludes the Australian Capital Territory from 1993-94.

(d) The Australian Capital Territory included with New South Wales.

3.3 NATURAL GAS, Mains Laid and Mains in Use—1994–95(a)

Items	NSW km	Vic. km	Qld km	SA km	WA km	Tas. km	NT km	ACT km	Aust. km
Construction: mains laid year ended 30 June 1995(b)									
Reticulation mains									
Low and medium pressure	579	35	118	(c)-12	185	—	—	108	1 013
High pressure	51	344	1	86	10	—	5	10	507
Transmission — high pressure	336	55	240	174	—	—	322	—	1 127
<i>Total</i>	966	433	359	248	195	—	327	118	2 647
Total pipeline network in use at 30 June 1995(b)									
Reticulation mains									
Low and medium pressure	18 237	9 845	3 218	3 420	8 840	—	—	2 838	46 398
High pressure	1 652	12 559	86	2 861	528	—	24	184	17 894
Transmission — high pressure	2 043	2 187	1 362	1 609	2 648	—	2 211	—	12 060
<i>Total</i>	21 932	24 591	4 666	7 890	12 016	—	2 235	3 022	76 352

(a) Source: The Australian Gas Association, Annual Survey of Distributors, Pipeliners and Producers.

(b) Reticulation — low and medium pressure < 200 kPa

Reticulation — high pressure < 3500 kPa

Transmission — high pressure > 3500 kPa

(c) Low pressure mains were replaced with high pressure reticulation mains.

3.4 UTILITY NATURAL GAS OPERATIONS—1994-95(a)

Items	Unit	NSW	Vic.	Qld	SA	WA(b)	Tas.	NT	ACT	Aust.
SALES										
Residential	TJ	13 328	75 257	1 483	7 300	6 194	—	1	2 399	105 962
Commercial	TJ	10 737	20 417	1 197	3 100	1 835	—	65	2 231	39 582
Industrial	TJ	73 818	76 120	8 490	28 100	39 281	—	—	140	225 949
<i>Total</i>	<i>TJ</i>	<i>97 883</i>	<i>171 794</i>	<i>11 170</i>	<i>38 500</i>	<i>47 310</i>	<i>—</i>	<i>66</i>	<i>4 770</i>	<i>371 493</i>
CUSTOMERS										
Residential	no.	644 774	1 278 995	119 195	304 134	334 970	—	92	49 253	2 731 413
Commercial	no.	22 140	35 336	3 879	7 002	6 320	—	54	1 401	76 132
Industrial	no.	2 307	4 196	527	1 252	234	—	—	4	8 520
<i>Total</i>	<i>no.</i>	<i>669 221</i>	<i>1 318 527</i>	<i>123 601</i>	<i>312 388</i>	<i>341 524</i>	<i>—</i>	<i>146</i>	<i>50 658</i>	<i>2 816 065</i>
REVENUE										
Residential	\$m	161.8	686.3	27.4	92.5	92.6	—	—	24.6	1 085.2
Commercial	\$m	98.2	125.8	15.0	21.8	26.0	—	0.8	20.1	307.7
Industrial	\$m	371.7	286.4	59.8	103.4	141.7	—	—	1.2	964.2
<i>Total</i>	<i>\$m</i>	<i>631.7</i>	<i>1 098.5</i>	<i>102.1</i>	<i>217.7</i>	<i>260.3</i>	<i>—</i>	<i>0.8</i>	<i>45.9</i>	<i>2 357.1</i>
AVERAGE GAS SALES PER CUSTOMER										
Residential	GJ	21	59	12	24	18	—	11	49	39
Commercial	GJ	485	578	309	443	290	—	1 204	1 592	522
Industrial	GJ	31 997	18 141	16 111	22 444	167 868	—	—	35 000	26 520
<i>Total</i>	<i>GJ</i>	<i>146</i>	<i>130</i>	<i>90</i>	<i>123</i>	<i>139</i>	<i>—</i>	<i>452</i>	<i>94</i>	<i>132</i>
AVERAGE REVENUE PER CUSTOMER										
Residential	\$	251	537	230	304	276	—	228	500	397
Commercial	\$	4 436	3 560	3 863	3 113	4 114	—	15 352	14 318	4 109
Industrial	\$	161 114	68 254	113 464	82 588	605 556	—	—	299 250	113 166
<i>Total</i>	<i>\$</i>	<i>944</i>	<i>833</i>	<i>826</i>	<i>697</i>	<i>762</i>	<i>—</i>	<i>5 479</i>	<i>906</i>	<i>837</i>
AVERAGE REVENUE PER UNIT OF SALES										
Residential	\$/GJ	12.14	9.12	18.45	12.67	14.95	—	21.00	10.27	10.24
Commercial	\$/GJ	9.15	6.16	12.52	7.03	14.17	—	12.75	8.99	7.77
Industrial	\$/GJ	5.04	3.76	7.04	3.68	3.61	—	—	8.55	4.27
<i>Total</i>	<i>\$/GJ</i>	<i>6.45</i>	<i>6.39</i>	<i>9.14</i>	<i>5.65</i>	<i>5.50</i>	<i>—</i>	<i>12.88</i>	<i>9.62</i>	<i>6.34</i>

(a) Source: The Australian Gas Association, Annual Survey of Distributors, Pipeliners and Producers.

(b) Following the disaggregation of the Dorngas contract, the North West Shelf producers entered into direct contracts with major industrial customers which prior to 1 January 1995 had been supplied by Alinta Gas' predecessor. In order to facilitate future comparisons, gas supplied to those customers between July and December 1994 has been excluded from utility sales data.

3.5 RESIDENTIAL GAS CONSUMPTION(a), Per Head of Population(b)—Year ended 30 June 1995

Item	NSW	Vic.	Qld	SA	WA	Tas.	NT	ACT	Aust.
	GJ	GJ	GJ	GJ	GJ	GJ	GJ	GJ	GJ
Consumption per person	2.2	16.6	0.5	5.0	3.6	—	—	7.9	5.8

(a) Source: The Australian Gas Association, Annual Survey of Distributors, Pipeliners and Producers.

(b) Source: *Estimated Resident Population By Sex and Age: States and Territories of Australia* (Cat. no. 3201.0).

3.6 MANAGEMENT UNITS(a), Income and Expenditure

Items	1993-94	1994-95
	\$m	\$m
Sales of goods and services	2 403.1	2 719.9
Less		
Purchases of goods and materials	982.8	1 224.4
Rent, leasing and hiring expenses		
Motor vehicles	3.9	3.2
Plant, machinery and other equipment	15.6	13.6
Land, buildings and other structures	16.8	19.7
Other rent, leasing and hiring	—	0.2
Outward freight and cartage	6.4	42.6
Motor vehicle expenses	18.4	19.9
Repair and maintenance expenses	21.1	14.8
Payment for contract, sub-contract and commission work	24.9	29.5
Other selected expenses	464.0	545.8
Purchases and selected expenses	1 553.8	1 913.6
Plus		
Opening stocks	59.0	53.1
Less		
Closing stocks	53.8	45.8
Cost of sales	1 558.9	1 920.9
Trading profit	844.2	798.9
Plus		
Rent, leasing and hiring income	1.5	1.7
Government subsidies	2.7	—
Interest income	6.7	2.2
Other income	37.9	18.1
Less		
Wages and salaries	299.7	298.0
Superannuation	27.8	20.7
Workers' compensation	8.1	5.9
Selected labour costs	335.7	324.5
Less		
Depreciation	130.2	117.8
Insurance premiums	6.1	6.5
Royalties expenses	1.4	0.1
Bad debts	6.4	2.1
Earnings before interest and tax	413.2	370.0
Less		
Interest expenses	86.5	53.4
Operating profit before tax	326.6	316.6

(a) See Explanatory Notes, 'Statistical units', paragraphs 14-19.

3.7 MANAGEMENT UNITS(a), Industry Gross Product

Items	1993-94	1994-95
	\$m	\$m
Sales of goods and services	2 403.1	2 719.9
Rent, leasing and hiring income	1.5	1.7
Government subsidies	2.7	—
<i>Plus</i>		
Capital work done for own use	30.2	81.4
Turnover	2 437.4	2 803.0
<i>Plus</i>		
Closing stocks	53.8	45.8
<i>Less</i>		
Opening stocks	59.0	53.1
<i>Less</i>		
Purchases and selected expenses	1 553.8	1 913.6
Industry gross product	878.4	882.0

(a) See Explanatory Notes, 'Statistical units', paragraphs 14-19.

3.8 MANAGEMENT UNITS(a), Assets and Liabilities

Items	1993-94	1994-95
	\$m	\$m
Assets		
Current assets		
Closing stocks	53.8	45.8
Other current assets	384.1	453.9
Non-current assets	2 571.7	2 516.2
<i>Total value</i>	<i>3 009.6</i>	<i>3 015.9</i>
Liabilities		
Current liabilities	624.9	537.4
Non-current liabilities	1 201.7	895.3
<i>Total value</i>	<i>1 826.7</i>	<i>1 432.8</i>
Net worth	1 182.9	1 583.1

(a) See Explanatory Notes, 'Statistical units', paragraphs 14-19.

3.9 MANAGEMENT UNITS(a), Acquisitions and Disposals of Assets

Items	1993-94	1994-95
Capital expenditure on		
Land	—	0.3
Dwellings	1.7	2.0
Other buildings and structures	88.8	103.8
Plant, machinery and equipment	173.1	123.6
<i>Total acquisitions</i>	263.6	229.7
Disposal of assets	23.1	14.1
Net capital expenditure	240.5	215.6

(a) See Explanatory Notes, 'Statistical units', paragraphs 14-19.

3.10 MANAGEMENT UNITS(a), Selected Performance Measures

Items	Unit	1993-94 1994-95	
		\$m	\$m
Turnover			
Asset turnover	%	0.8	0.9
Profitability			
Trading profit margin	%	35.1	29.4
Return on funds	%	17.3	14.9
Return on assets	%	11.1	10.7
Liquidity			
Liquidity ratio	times	0.6	0.8
Current ratio	times	0.7	0.9
Debt			
Interest coverage ratio	times	4.8	6.9
Debt to assets	%	61.8	48.2
Capital expenditure			
Acquisitions to disposals ratio	times	11.4	16.3
Net capital expenditure to assets	%	8.1	7.3

(a) See Explanatory Notes, 'Statistical units', paragraphs 14-19.

3.11 ESTABLISHMENT LEVEL(a), Income and Expenditure

Items	1993-94 1994-95	
	\$m	\$m
Sales of gas and gas by-products(b)	2 869.0	2 994.4
Sales of other goods(b)	146.5	146.5
Service income	56.8	76.0
Rent, leasing and hiring income	1.4	2.7
Government subsidies	8.7	6.0
<i>Plus</i>		
Capital work done for own use	50.5	108.2
Turnover	3 132.9	3 333.8
<i>Plus</i>		
Closing stocks	58.6	48.3
<i>Less</i>		
Opening stocks	64.2	58.7
<i>Less</i>		
Purchases		
Materials, components, containers etc.(c)	69.3	255.4
Fuels	5.8	1.8
Electricity	—	6.3
Gas	1 200.2	1 126.9
Goods for resale(c)	108.9	103.4
Rent, leasing and hiring expenses		
Motor vehicles	3.9	3.6
Plant, machinery and other equipment	15.7	14.3
Land, buildings and other structures	16.8	20.7
Other rent, leasing and hiring	—	—
Outward freight and cartage	6.4	13.0
Motor vehicle expenses	19.0	18.4
Repair and maintenance expenses	22.4	18.0
Payment for contract, sub-contract and commission work	24.2	67.0
<i>Purchases and selected expenses</i>	<i>1 492.6</i>	<i>1 648.7</i>
Value added	1 634.7	1 674.7

(a) See Explanatory Notes, 'Statistical units', paragraphs 14-19.

(b) Includes transfers out to other establishments of the same management unit where appropriate.

(c) Includes transfers in from other establishments of the same management unit where appropriate.

3.12 EMPLOYMENT AT END OF JUNE

Items	Unit	1993-94	1994-95
MANAGEMENT UNITS(a)			
Management units at 30 June	no.	24	17
Employment at end of June	no.	7 074	6 738
Persons employed per management unit	no.	294.8	396.4
Labour ratios			
Profit to employment	\$'000/employee	46.2	47.0
Industry gross product			
To employment	\$'000/employee	124.2	130.9
To selected labour costs	times	2.6	2.7
Selected labour costs			
To employment	\$'000/employee	47.5	48.2
ESTABLISHMENTS(a)			
Establishments(b) at 30 June	no.	29	22
Employment at end of June			
Males	no.	6 181	5 542
Females	no.	1 504	1 552
Persons	no.	7 685	7 094
Persons employed per establishment	no.	265.0	322.5
Employment type			
Administrative, office and sales	no.	4 535	3 955
Production and all other employees	no.	3 150	3 139
Employees engaged on new construction	no.	243	310
Wages and salaries			
All employees	\$m	315.0	297.5
Employees engaged on new construction	\$m	10.0	10.8

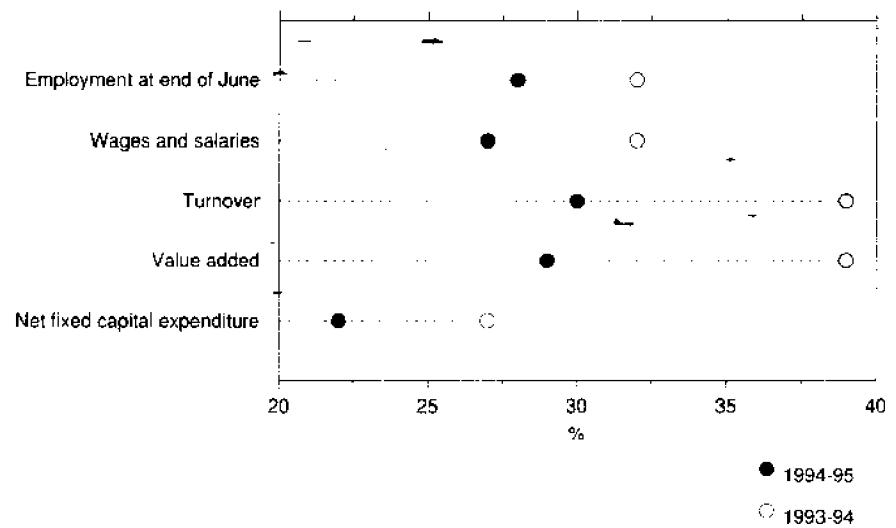
(a) See Explanatory Notes, 'Statistical units', paragraphs 14-19.

(b) Number of gas establishments operating at 30 June 1995 for the States/Territories were
 New South Wales - 12; Victoria - 1; Queensland - 5; South Australia - 2;
 Western Australia - 1; Tasmania - 1; Northern Territory - 1; Australian Capital Territory - 1.

CONCENTRATION STATISTICS

In 1994-95, the four largest management units accounted for 29% of value added in the electricity and gas industries compared with 39% in 1993-94. Industry restructuring is primarily responsible for the dilution of the share of these management units. Similar declines in the concentration pattern were also observed in the other selected indicators with the four largest management units accounting for 30% of turnover (39% in 1993-94) and 28% of employment (32% in 1993-94) in 1994-95.

Contribution of top four management units to indicators



4.1 SELECTED STATISTICS AND CONCENTRATION RATIOS(a)(b)

Items	Management units at 30 June.....		Establishments at 30 June.....		Employment at end of June.....		Wages and salaries.....	
	no.	ratio	no.	ratio	no.	ratio	\$m	ratio
Management units ranked by contribution to industry in categories of four								
First	4	0.04	5	0.05	13 676	0.28	546.7	0.27
Second	4	0.04	5	0.05	6 383	0.13	337.3	0.16
Third	4	0.04	4	0.04	2 241	0.05	242.4	0.12
Fourth	4	0.04	5	0.05	7 596	0.15	224.7	0.11
Fifth	4	0.04	5	0.05	3 679	0.07	156.3	0.08
Sixth	4	0.04	4	0.04	2 463	0.05	86.8	0.04
Remainder	78	0.76	79	0.74	13 442	0.27	465.9	0.23
Industry total	102	1.00	107	1.00	49 480	1.00	2 060.0	1.00

Items	Turnover.....		Value added.....		Fixed capital expenditure less disposals.....	
	\$m	ratio	\$m	ratio	\$m	ratio
Management units ranked by contribution to industry in categories of four						
First	7 274.5	0.30	3 166.2	0.29	482.6	0.22
Second	3 913.9	0.16	1 948.2	0.18	399.0	0.18
Third	3 268.4	0.13	1 035.2	0.10	198.6	0.09
Fourth	2 509.6	0.10	1 341.9	0.12	262.1	0.12
Fifth	1 615.1	0.07	1 008.8	0.09	122.6	0.06
Sixth	1 086.3	0.04	310.6	0.03	66.9	0.03
Remainder	4 562.4	0.19	2 057.6	0.19	682.2	0.31
Industry total	24 230.2	1.00	10 868.5	1.00	2 214.0	1.00

(a) See Explanatory Notes, 'Concentration Statistics', paragraphs 27-32.

(b) Note that the number of management units is greater in this table than the total of number of management units in previous tables. This is due to the inclusion of establishments in this table which belong to management units which are classified to industries other than electricity and gas.

EXPLANATORY NOTES

INTRODUCTION

1 Many of the statistics in this publication have been derived from the 1994-95 Census of Electricity and Gas Operations. The census aims to meet demands of users who require annual financial statistics which can be related to other industry sectors in Australia on a consistent basis. In addition, some tables contain statistical information that has been obtained from other ABS collections or sources external to the ABS.

2 The Census of Electricity and Gas Operations is conducted as a component of the ABS integrated economic statistics system. Data from each industry sector conform to the same basic conceptual standards, allowing comparative analysis between and across different industry sectors.

3 The findings for 1993-94 are now final and replace those previously issued in the 1993-94 issue of this publication (Cat. no. 8208.0) released on 9 June 1995.

SCOPE

4 The 1993 edition of the *Australian and New Zealand Standard Industrial Classification (ANZSIC)* (Cat. no. 1292.0) has been used to classify management units (and establishments) included in the Census of Electricity and Gas Operations.

5 The Census of Electricity and Gas Operations covers those management units and establishments mainly engaged in the generation, transmission or distribution of electricity; the manufacture of town gas from coal and/or petroleum or, the mains distribution of town gas, natural gas or liquefied petroleum gas. Note that management units and establishments mainly engaged in the distribution of liquefied petroleum gas in bulk or in containers are classified to wholesaling.

6 Electricity generation is sometimes undertaken within a location mainly engaged in other activities (e.g. a manufacturing establishment) solely, or in part, to provide power for those activities. Statistics relating to electricity generation in this situation are not treated as part of the electricity industry and therefore are not included in this publication, unless sales or transfers out of electricity exceed a specific value (\$6.9m in 1993-94 and \$7.0m in 1994-95). The statistics do include details relating to separate locations of a management unit mainly engaged in producing electricity for use by other locations of the management unit (e.g. for use by a separately located manufacturing establishment).

EXTERNAL SOURCES

7 A range of tables are presented that have been obtained from external sources. Electricity commodity data has been obtained from the Electricity Supply Association of Australia (ESAA) whilst similar information for gas has been obtained from the Australian Gas Association (AGA).

8 The ESAA publishes data that has been assembled by the State Regulatory Authorities in Australia. The tables cover the public supply of electricity, but do not cover the supply by private organisations primarily for their own use. Consequently significant generation for some mining, manufacturing and commercial organisations is excluded from the statistics.

9 The tables are presented for the year ended 30 June (or at 30 June) which is the financial year of the main supply authorities.

10 The supply authorities throughout Australia operate under legislation passed by the various State Governments, relating to the generation and distribution of electricity. Accordingly, the organisation of electricity distribution varies from State to State and separate accounting systems and supply practices have developed.

11 The AGA collects utility data from distributors of reticulated natural gas. Information relating to revenue, number and nature of customers and characteristics of reticulation systems are among the data items collected. The definition of customer type varies across States, however, Residential customers are defined as those units purchasing gas at the Domestic Tariff rate. Industrial customers include those units that are involved in manufacturing, processing or mining. The Commercial category incorporates all other types of business (e.g. shops, restaurants, hospitals).

12 Prior to 1993-94 the regional boundaries used in AGA tables did not completely equate to geographical boundaries. For this reason, prior to 1993-94, data for the Australian Capital Territory was included in the New South Wales figures and data for Albury was included in Victoria.

13 Should the user require further details about tables that have been obtained from either ESAA or AGA, it is recommended that that organisation be contacted.

STATISTICAL UNITS

14 This publication presents industry statistics relating to management units. Such statistics are compiled differently from activity statistics. Each management unit is classified to a single industry irrespective of any diversity of activities undertaken. The industry allocated is the one which provides the main source of income for the management unit. This means, for example, that a management unit which derives most of its income from electricity generation activities would have all operations included in the aggregates and ratios for the electricity industry group, even if significant secondary activities (e.g. coal mining, retailing) were undertaken.

15 The basic units for which statistics are reported in ABS integrated industry collections are the management unit and the establishment.

16 The management unit is the highest-level unit within a business, having regard to industry homogeneity requirements, for which accounts are maintained; in nearly all cases it coincides with the legal entity owning the business (i.e. company, partnership, trust, sole operator, etc.). In the case of large diversified businesses, however, there may be more than one management unit, each coinciding with a division or line of business. A management unit is recognised where separate and comprehensive accounts are compiled for it.

17 The establishment is the smallest accounting unit of a business, within a State or Territory, controlling its productive activities and maintaining a specified range of detailed data including data enabling value added to be calculated. In general an establishment covers all operations at a physical location, but may consist of a group of locations provided they are within the same State or Territory and classified to a single industry. The majority of establishments operate at one location only.

18 The differences in definition of management unit and establishment often result in different values being obtained for certain data items. For example employment at the establishment level only includes those employees that are involved in that industry whilst employment at the management unit level includes all employees of that business unit. This often includes employees who would be included in a different industry at the establishment level (e.g. retail sales staff, head office staff).

19 Separately located administrative offices and ancillary units such as storage premises, laboratories and producers' sales branches continue to have their activities included with electricity or gas activities unless these ancillaries constitute a separate accounting unit, in which case they are defined as a separate establishment.

REFERENCE PERIOD

20 The period covered by the census is in general the 12 months ended 30 June. Where businesses are unable to supply information on this basis, the substitute accounting period is used for data other than that relating to employment.

INDUSTRY PERFORMANCE MEASURES

21 A range of performance measures, usually referred to as 'ratios', can be produced from the data available from profit and loss statements and balance sheets of businesses. This publication presents only a selection of these. While these are a very useful way of presenting summaries of performance, users of these statistics should note the limitations referred to below before making any judgments based on these results. Comment from analysts on the need for, and use of these or other measures would be welcomed by the ABS.

22 Users should take particular note of the following limitations in respect of the ratios presented in this publication.

23 The usefulness of the ratios for analytical purposes depends on how they are calculated. Comparison between industries on a total industry basis may be best served by the estimates presented herein, i.e. based on industry estimates for numerators and denominators. Users should be aware that assessment of individual business performance based on comparisons with industry estimates may be misleading for other reasons. There may be circumstances peculiar to the business in question which should be taken into account. For example, is it undertaking a program of expansion, contraction, diversification or amalgamation during the period under review? Analysis of movements in performance indicators of the business and industry over a number of years would be more appropriate.

24 Differences in accounting policy and practices across businesses and industries lead to some inconsistencies in the data input to these estimates. While much of the accounting process is subject to standards, there is still a great deal of flexibility left to managers in the accounting policy and practices they adopt. For example, acceptable methods of asset valuation include historical cost, replacement cost and current market value. The timing of asset revaluations also varies considerably across businesses. The way profit is measured is affected by management policy on such things as depreciation rates, bad debt provisions and write-off and goodwill write-off. The varying degree to which businesses decide to consolidate their accounts may affect the quality of the ratios calculated. In general, the effect of consolidation is to 'net out' some of the transactions between related business units and this may distort some ratios.

25 Finally, use of a single ratio in any analysis is to be avoided because it could be misleading. Often the interpretation of one ratio is influenced by the value of others. The above limitations are not meant to imply that analysis based on ratios should be avoided. However, they should be borne in mind when making any commentary or decisions based on these types of statistics.

26 The ratios presented in this publication are categorised as follows:

- Turnover ratios indicate the efficiency of selling activities (including the sale of services as well as goods);
- Profitability ratios measure rates of profit on sales, funds and assets;
- Liquidity ratios measure the ability of businesses to meet short-term financial obligations, i.e. how quickly can it convert selected assets into cash;
- Debt ratios indicate the extent to which debt is used as an alternative to financing through equity and the ability of businesses to meet the cost of such financing;
- Labour ratios measure the relative profitability and costs of labour; and
- Capital expenditure ratios indicate the ability and extent to which businesses invest in capital assets.

A further explanation of each ratio can be found in the Glossary of Terms of this publication.

CONCENTRATION STATISTICS

27 Industry concentration statistics are concerned with providing measures of the extent to which a few management units predominate in individual industries. They are a useful aid in assessing the degree of competition existing among management units engaged in an industry.

28 These statistics provide measures of concentration in industries as a whole and therefore are not measures of concentration in the market for commodities or activities.

29 The concentration statistics provided in this publication relate to Australia as a whole. Similar information is not available for States or other regional areas.

30 The following steps outline the method used to calculate concentration ratios for each industry:

- Establishments engaged in an industry and belonging to the same management unit were brought together and the data reported for them were aggregated. In this way it was possible to identify the contribution to industry totals by establishments operating under common ownership or control.
- Management units were ranked in descending order according to the size of the contribution of their establishments to the total turnover of the industry.
- The ranked management units were brought together into categories of four units, in the following sequence:
 - ◆ largest 4 management units
 - ◆ second largest 4 management units
 - ◆ third largest 4 management units
 - ◆ fourth largest 4 management units
 - ◆ fifth largest 4 management units
 - ◆ remaining management units owning or controlling establishments in the industry.

Each of the five categories of four management units comprises statistics of units which were in operation in the industry concerned at any time during the year 1994-95.

31 For each of the categories the contribution of the category to the total for the industry was determined for each of the data items. The contribution is shown in the tables as an absolute amount and as a proportion of the total for the industry.

32 Categories of four management units were chosen to conform with international practice and will therefore facilitate comparison of concentration patterns in Australian industries with patterns in other countries.

RELATED PUBLICATIONS AND AVAILABILITY OF UNPUBLISHED STATISTICS

Related publications

33 Users may also wish to refer to the following publications:

Agricultural Industries, Financial Statistics, Australia (Cat. no. 7507.0)

Australian Mining Industry (Cat. no. 8414.0)

Business Operations and Industry Performance, Australia (Cat. no. 8140.0)

Manufacturing Industry, Australia (Cat. no. 8221.0)

Manufacturing Industry: Summary of Operations, Australia (Cat. no. 8202.0)

Manufacturing Production, Australia (Cat. no. 8301.0) which includes details of the production (quantity) of important manufactured commodities (including electricity and gas) — issued approximately four weeks after the month to which it relates.

Mining Industry, Australia, Preliminary (Cat. no. 8401.0)

34 Current publications produced by the ABS are listed in the *Catalogue of Publications and Products* (Cat. no. 1101.0). The ABS also issues, on Tuesdays and Fridays, a *Release Advice* (Cat. no. 1105.0) which lists publications to be released in the next few days. The Catalogue and Release Advice are available from any ABS office.

Unpublished statistics

35 The statistics presented in this publication represent only a portion of the information which is available from the Census of Electricity and Gas Operations. Unpublished information can generally be made available on request, subject to quality and confidentiality guidelines associated with the release of such data. The charges for these services vary according to the time required to extract, tabulate and evaluate the data.

36 Inquiries should be made to the officer named in the Inquiries section at the front of this publication.

SYMBOLS AND ABBREVIATIONS

37 The following symbols and abbreviations are used in this publication:

ABS	Australian Bureau of Statistics
AGA	Australian Gas Association
ANZSIC	Australian and New Zealand Standard Industrial Classification
EBIT	Earnings before interest and tax
ESAA	Electricity Supply Association of Australia
GDP(A)	Gross Domestic Product (Average)
GJ	Gigajoules (10^9)
IGP	Industry Gross Product
kVA	kilovolt ampere
m	million (10^6)
OPBT	Operating profit before tax
TJ	Terajoules (10^{12})
1kWh	kilowatt hour = 3,600 kJ
—	nil or rounded to zero
..	not applicable

ROUNDING

38 Where figures have been rounded, discrepancies may occur between the sum of component items and the total.

GLOSSARY

As the data presented in this publication have been compiled from the standard financial accounts of businesses, the definition of each reported item aligns closely with that adopted in standard business accounting practice. In those instances where more than one standard or definition is available, the following paragraphs indicate which one has been chosen.

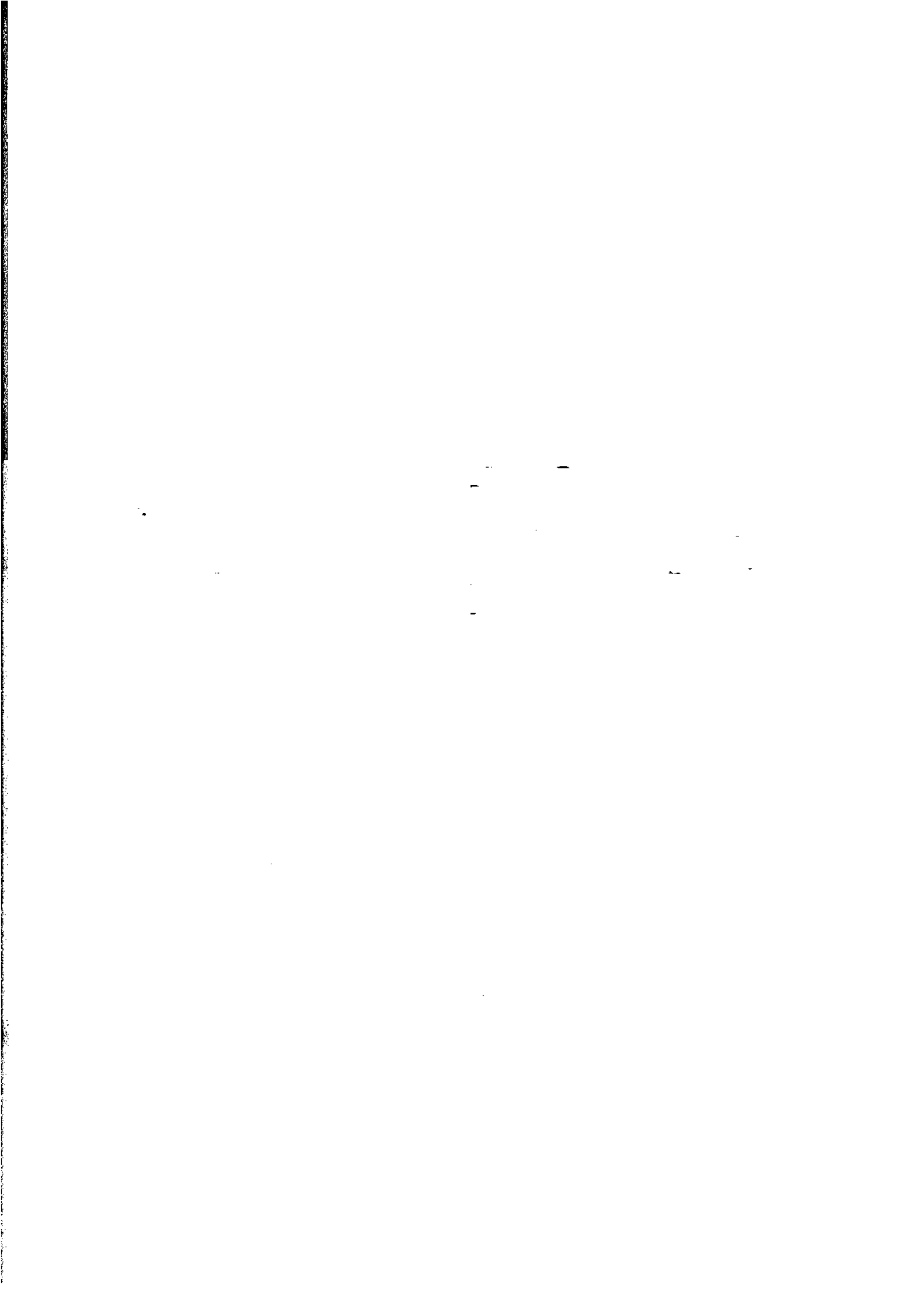
The data presented relate to management units and establishments which operated at any time during the year. Unless otherwise stated, details for management units and establishments which are being set up but are not yet in productive operation are also included.

Acquisitions to disposals	The number of times that dollars spent on acquiring assets exceed dollars received for disposal of assets, i.e. Total acquisitions/Total disposals.
Asset turnover ratio	A measure of the number of times the value of sales exceeds the value of assets, i.e. Sales of goods and services/Total assets.
Bad debts	Represents the amount of bad debts written off net of bad debts previously written off but recovered.
Capital expenditure	Includes all capitalised costs and progress payments made to contractors for capital work on land, dwellings, buildings and structures and plant, machinery and equipment (both new and second-hand).
Capital work for own use	Work that is done by the employees of the business for its own use or for rental or lease purposes. This value should include the wages of the employees as well as materials withdrawn from stock.
Cost of sales	The sum of purchases, selected expenses and opening stocks minus closing stocks.
Current assets	Refers to the value of closing trading stock (i.e. at the end of the financial year) plus the value of other current assets such as cash, short-term deposits, prepayments and short-term loans to employees.
Current liabilities	The book value of current liabilities at the end of the financial year. This includes provisions for taxation, leave, claims, trade creditors and other accounts payable and bank overdrafts.
Current ratio	The number of times current assets exceed current liabilities, i.e. Current assets/Current liabilities.
Debt to assets	The percentage of assets financed by debt as opposed to equity, i.e. (Total liabilities/Total assets) x 100.
Depreciation	Includes depreciation allowed on buildings and other fixed tangible assets.
Disposal of assets	Includes the proceeds from the sale of land, dwellings, buildings, plant, machinery and equipment.
Earnings before interest and tax (EBIT)	A measure of profit prior to the deduction of interest expenses and income tax.

Net worth	Total assets minus total liabilities and is equal to the interest of shareholders or other owners in the assets of the business.
Non-current assets	The book value of non-current assets at the end of the financial year. This includes plant and machinery needed for normal operations, capitalised interest, property and goodwill.
Non-current liabilities	The book value of non-current liabilities at the end of the financial year. This includes bank loans, debentures and unsecured notes.
Operating profit before tax (OPBT)	A measure of profit before extraordinary items are brought to account and prior to the deduction of income tax and appropriations to owners (e.g. dividends paid).
Other income	Includes royalty income, dividends, net profit (or loss) on the sale of fixed tangible assets and net profit (or loss) on foreign exchange. It excludes extraordinary profits or losses such as those associated with the sale of a segment of the business or goodwill revaluations.
Other selected expenses	Includes expenditure on management fees/charges paid to related and unrelated businesses, office supplies and printing costs, telephone and postage charges, travelling and entertainment expenses, accounting and legal services, advertising costs, payroll tax, fringe benefits tax, land tax, rates and subsidy expenses (i.e. amounts paid to electricity subsidy funds).
Outward freight and cartage	Excludes the cost of delivery by own vehicles and employees.
Payment for contract, sub-contract and commission expenses	Includes payments to other businesses and self-employed persons for work done or sales made on a contract or commission basis. Payments to persons paid by commission without a retainer are also included.
Profit to employment	The average amount, expressed in thousands of dollars, of operating profit before tax contributed by each employee, working proprietor and working partner, i.e. Operating profit before tax/Employment.
Purchases of goods and materials	Include purchases of materials, components, containers, packaging, fuels, electricity and water, and purchases of other goods for resale.
Rent, leasing and hiring expenses for motor vehicles	Excludes expenses for off-road motor vehicles and finance lease payments.
Rent, leasing and hiring expenses for land, buildings and other structures	Includes rent paid for land, premises, shops, warehouses etc.
Rent, leasing and hiring expenses for plant, machinery and other equipment	Includes hiring of equipment without an operator.
Rent, leasing and hiring income	Includes proceeds from the rent, lease or hiring of land, buildings, machinery, vehicles and equipment.
Repair and maintenance expenses	Excludes the repair and maintenance costs of motor vehicles and the wages and salaries paid to own employees.

Return on assets	Derived by expressing operating profit before tax as a percentage of the total book value of assets, i.e. $(\text{Operating profit before tax} / \text{Total assets}) \times 100$.
Return on funds	Derived by expressing earnings before interest and tax as a percentage of the total of shareholders funds and non-current liabilities, i.e. $\text{Earnings before interest and tax} / (\text{Net worth} + \text{Non-current liabilities}) \times 100$.
Royalties expenses	Includes any payments made for the use of rights, information or material owned by another company or person.
Sales of goods and services	Includes revenue from the sale of electricity (or gas and gas by-products), other goods (e.g. electrical or gas appliances, waste materials, sales of trade-ins) and service income (e.g. repair and service income, contract, sub-contract and commission income, installation charges). Note that at the establishment level Sales of goods and services includes the value of any transfers out of electricity (or gas) and/or other goods for resale. These transfers are valued, for statistical purposes, at prices commensurate with the prices which would have been received or paid if the establishments concerned had been under separate ownership i.e. at commercial selling price.
Selected labour costs	The sum of wages and salaries, superannuation and workers' compensation. Wages and salaries include gross wages and salaries and amounts paid as severance, termination and redundancy payments to permanent, temporary, casual and part-time employees. Superannuation includes all employer contributions to superannuation schemes and any benefits paid by employers operating unfunded schemes. Workers' compensation includes premiums and any other costs incurred by the employer, not reimbursed by an insurance company.
Selected labour costs to employment	The average amount, expressed in thousands of dollars, of selected labour costs incurred by business (including wages, salaries, superannuation, workers' compensation premiums) for each employee, working proprietor and working partner, i.e. $\text{Selected labour costs} / \text{Employment}$.
Stocks — Opening and closing	The value of all stocks of finished goods, work-in-progress, raw materials, fuels, containers, etc. at the beginning and end of the financial year, respectively.
Superannuation	Includes all employer contributions to superannuation schemes and any benefits paid by employers operating unfunded schemes.
Trading profit	A measure of profit directly attributable to trading in goods and services. It is derived by subtracting the cost of sales from the value of sales of goods and services.
Trading profit margin	Derived by expressing total trading profit as a percentage of total sales of goods and services, i.e. $(\text{Trading profit} / \text{Sales of goods and services}) \times 100$
Turnover	Includes all proceeds from operating revenue (i.e. sales, transfers out for establishment data, service income, rent, leasing and hiring income and government subsidies) plus the value of capital work done for own use, or for rental or lease.

- Value added** A measure of the production attributable to each industry. Its derivation is the same as Industry gross product except that it does not take into account other selected expenses.
- Wages and salaries** Refers to payments made to all permanent, part-time, casual and temporary employees on the payroll during the financial year. Such payments include severance, termination and redundancy payments, overtime earnings, penalty payments and shift allowances, all paid leave, leave loadings and bonuses.
- Workers' compensation** Includes premiums and any other costs incurred by the employer not reimbursed by an insurance company.



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