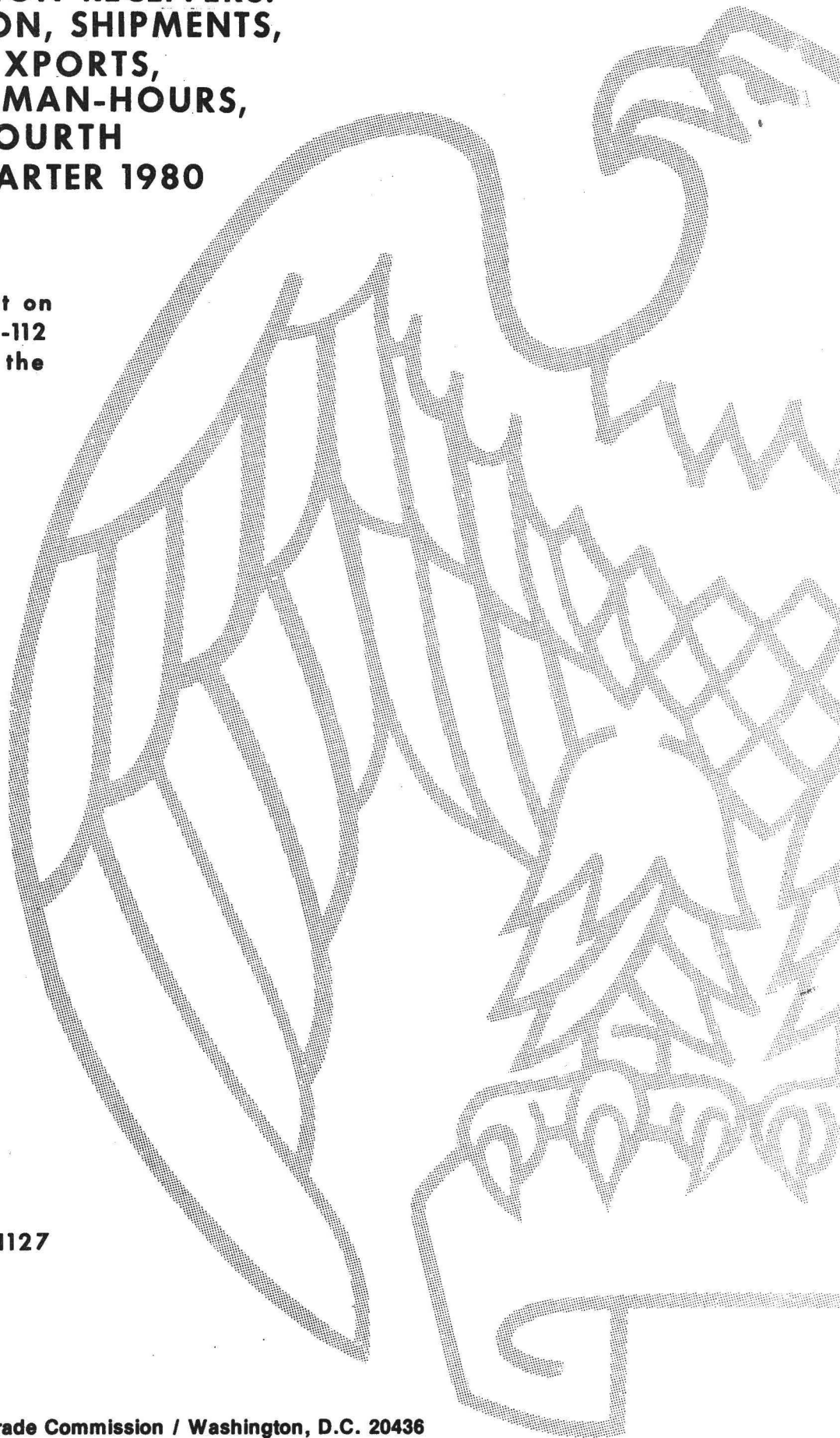


**COLOR TELEVISION RECEIVERS:
U.S. PRODUCTION, SHIPMENTS,
INVENTORIES, EXPORTS,
EMPLOYMENT, MAN-HOURS,
AND PRICES, FOURTH
CALENDAR QUARTER 1980**

**Report to the President on
Investigation No. 332-112
Under Section 332 of the
Tariff Act of 1930**

**USITC PUBLICATION 1127
FEBRUARY 1981**



UNITED STATES INTERNATIONAL TRADE COMMISSION

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Highlights

Fourth quarter 1980 U.S. production of color television receivers was 2.8 million sets, which was 9.3 percent greater than production in the corresponding quarter of 1979, and 300,000 more sets than in the third quarter of 1980. Exports of U.S.-made color sets amounted to 152,000 sets in the preceding quarter.

Ending December 1980 total inventories of U.S. producers were 42.1 percent higher than December 1979 levels. Inventories of all screen-size categories ranged from a 1.8 percent increase in the category of 20 inches and over to an 83.9 percent increase in the 18- and 19-inch screen-size category.

U.S. producers' shipments of all screen sizes in the fourth quarter of 1980 were 2.6 million sets, the same as in the corresponding 1979 period. Shipments of sets 20 inches and over decreased by 9.7 percent, while shipments in the 18- and 19-inch screen-size category increased by 5.7 percent and those in the 17-inch-and-under category increased by 11.1 percent.

The number of all persons and of production and related workers employed by U.S. producers declined by 5.5 and 4.2 percent, respectively, in the fourth quarter of 1980, compared with the fourth quarter of 1979.

Average unit net selling prices rose for all screen sizes except the category of 14 through 17 inches. In the fourth quarter of 1980, as compared with the corresponding 1979 quarter, average quarterly prices in the 13-inch category increased by \$14.78 (6.6 percent), in the category of 18- and 19-inches by \$18.67 (6.4 percent), and in the 20 inches and over category by \$15.87 (3.2 percent). Average quarterly prices in the category of 14 through 17 inches decreased by \$16.24 (5.3 percent).

Capsulized Trend Analysis

U.S. production

U.S. production of color television receivers in the fourth quarter of 1980 was 2.8 million sets, 9.3 percent higher than production in the fourth quarter of 1979 and 27.8 percent higher than in the fourth quarter of 1978. Compared with the fourth quarter of 1979, production was higher in the categories of 17 inches and under and 18 and 19 inches, but lower for sets in the category of 20 inches and over. The share of production contributed by each of the three major screen-size categories changed minimally from the third quarter of 1980 to the fourth quarter of 1980.

U.S. producers' inventories

U.S. producers' inventories of color television receivers at the end of December 1980 were 741,321 units, 42.1 percent higher than the number in December 1979. Quarterly average inventories for the fourth quarter 1980 were 36.5 percent higher than inventories in the fourth quarter of 1979, but 6.2 percent lower than those in the fourth quarter of 1978. Stocks of sets 17 inches and under increased by an average of 49.5 percent, compared with the levels in the fourth quarter of 1979. In the category of 18 and 19 inches, average inventories increased by 74.8 percent, and in screen sizes of 20 inches and over, average inventories decreased by 0.2 percent, compared with fourth quarter 1979 levels. Compared with the inventories of the fourth quarter 1978, current average quarterly inventories for screen-size categories 17 inches and under were 9.1 percent higher; for 18 and 19 inches, 0.6 percent higher; and for 20 inches and over, 19.8 percent lower.

U.S. producers' shipments

U.S. producers' shipments of color television receivers in the fourth quarter of 1980 were 5.4 percent greater in quantity than those in the third quarter. In the fourth quarter of 1980, shipments amounted to 2.6 million sets, which were the same as those in the fourth quarter of 1979, but 20.1 percent higher than shipments in the fourth quarter of 1978. Compared with the fourth quarter of 1979, current shipments rose in all categories except in screen sizes of 20 inches and over, which decreased in quantity by 9.7 percent. Total shipments recorded a smaller increase over shipments in 1979 than that recorded between the corresponding periods of 1979 and 1978 (2.5 percent and 17.2 percent, respectively).

U.S. producers' exports

U.S. producers' exports of color television receivers mounted to 152,000 sets during the fourth quarter of 1980, compared with 246,000 sets during the preceding quarter. The category of 18 and 19 inches accounted for 82,000 sets, or 54.2 percent of total exports.

U.S. employment

Employment in U.S. producers' establishments maintained the slow, general decline in both production and related workers and in managerial employees. The average number of production and related workers employed during the fourth quarter 1980 was 21,975 persons, down 4.2 percent from 22,937 persons in the corresponding period of 1979. The average number of all workers was 25,076, down from 26,532 in the fourth quarter of 1979. Also, the number of man-hours worked by production and related workers was 11.0 million in the fourth quarter of 1980, down from 11.6 million in the corresponding period of 1979. This continuing decrease in employment and man-hours worked is believed

to be the result of increasing imports of major subassemblies and the increasing use of integrated circuits in color television receivers, both of which reduce the amount of assembly labor required.

Prices

Average unit net selling prices were higher for three of the four major screen-size categories during the fourth quarter of 1980, compared with those in the corresponding quarter of 1979. The average prices of the 13-inch size increased by \$14.78 (6.6 percent), those of the 14- through 17-inch sizes decreased by \$16.24 (5.3 percent), those of the 18- and 19-inch sizes increased by \$18.67 (6.4 percent), and those of the 20 inch and over sizes increased by \$15.87 (3.2 percent). These increases are well under the inflation rate as measured by the Consumer Price Index.

Screen sizes in the categories of 13 inches and 20 inches and over showed increased average quarterly prices in the fourth quarter of 1980 as compared with the third quarter. The 13-inch size increased by \$1.63, and the 20 inches and over sizes by \$3.26. The category of 14 through 17 inches decreased by \$10.69, and that of 18 and 19 inches by \$5.03.

Table 1.--Complete color television receivers: U.S. production, by screen size categories, by months, October 1978-December 1980

(In units)				
Period	Screen size category			
	17 inches and under	18 inches and 19 inches	20 inches and over	Total
1978:				
October-----	124,990	416,985	327,510	869,485
November-----	92,442	359,862	273,892	726,196
December-----	92,966	299,944	193,072	585,982
Subtotal-----	310,398	1,076,791	794,474	2,181,663
Total, 1978-----	1,287,836	3,858,800	3,135,789	8,282,425
1979:				
January-----	133,132	347,299	211,106	691,523
February-----	112,669	345,098	217,073	674,840
March-----	154,143	390,024	236,869	781,036
Subtotal 1/-----	399,944	1,082,421	665,048	2,147,413
April-----	156,947	299,899	195,557	652,403
May-----	125,708	379,069	231,956	736,733
June-----	139,984	414,966	263,767	818,717
Subtotal-----	422,639	1,093,934	691,280	2,207,853
July-----	125,624	282,438	173,023	581,085
August-----	235,471	349,928	257,577	742,976
September-----	151,783	374,665	255,529	781,977
Subtotal-----	412,878	1,007,031	686,129	2,106,038
October-----	179,614	498,056	277,710	955,380
November-----	172,668	482,812	247,835	903,315
December-----	122,377	394,618	175,443	692,438
Subtotal-----	474,659	1,375,486	700,988	2,551,133
Total, 1979-----	1,710,120	4,558,872	2,743,445	9,012,437
1980:				
January-----	198,715	512,959	210,102	921,776
February-----	145,346	482,926	220,367	848,639
March-----	169,272	488,290	232,937	890,499
Subtotal-----	513,333	1,484,175	663,406	2,660,914
April-----	192,926	499,310	202,527	894,763
May-----	199,196	528,210	222,077	949,483
June-----	192,620	464,216	223,325	880,161
Subtotal-----	584,742	1,491,736	647,929	2,724,407
July-----	172,670	363,437	198,486	734,593
August-----	148,112	402,953	218,800	769,865
September-----	209,336	503,570	268,416	981,322
Subtotal-----	530,118	1,269,960	685,702	2,485,780
October-----	245,909	614,528	279,135	1,139,572
November-----	205,511	461,568	201,898	868,977
December-----	164,069	430,712	185,590	780,371
Subtotal-----	615,489	1,506,808	666,623	2,788,920
Total, 1980-----	2,243,682	5,752,679	2,663,660	10,660,021

1/ Does not include data for two firms accounting for less than 5 percent of total U.S. industry shipments.

Source: Compiled from data submitted in response to questionnaires of the U.S. International Trade Commission.

Table 2.--Complete color television receivers: U.S. producers' inventories 1/ of U.S.-made and imported receivers, 2/ by screen size categories, by months, October 1978-December 1980

(In units)				
Period	Screen size category			
	17 inches : and under	18 inches : and 19 inches	20 inches : and over	Total
1978:				
October-----	131,423	361,117	326,418	818,958
November-----	119,580	378,371	329,238	827,189
December-----	110,682	364,339	294,612	769,633
Average-----	120,562	367,942	316,757	805,261
Average, 1978-----	141,133	310,783	328,259	780,175
1979:				
January-----	104,883	394,658	272,521	772,062
February-----	117,362	431,118	279,216	827,696
March-----	111,446	447,646	285,708	844,800
Average <u>2/</u> -----	111,230	424,474	279,148	814,852
April-----	162,681	469,043	346,392	978,116
May-----	171,778	491,240	354,148	1,017,166
June-----	147,838	448,179	329,049	925,066
Average-----	160,766	469,487	343,196	973,449
July-----	135,656	390,413	318,797	844,866
August-----	135,439	324,228	306,407	766,074
September-----	115,618	266,331	272,497	654,446
Average-----	128,904	326,991	299,234	755,129
October-----	92,678	232,485	252,857	578,020
November-----	92,018	211,161	260,167	563,346
December-----	79,291	191,407	250,826	521,524
Average-----	87,996	211,684	254,613	554,297
Average, 1979-----	122,224	358,159	294,048	774,430
1980:				
January-----	103,300	231,686	235,492	570,478
February-----	96,406	220,195	250,217	566,818
March-----	96,992	247,273	268,972	613,235
Average-----	98,899	233,051	251,561	583,511
April-----	121,035	346,723	295,705	763,463
May-----	154,234	477,705	335,625	967,564
June-----	151,051	508,942	328,057	988,050
Average-----	142,107	444,456	319,795	906,359
July-----	132,061	458,097	312,937	903,095
August-----	120,559	415,920	291,394	827,873
September-----	108,655	358,255	254,741	721,651
Average-----	120,425	410,757	286,357	817,539
October-----	124,744	383,334	252,317	760,395
November-----	135,841	374,827	254,512	765,180
December-----	134,175	351,902	255,244	741,321
Average-----	131,588	370,022	254,025	755,635
Average, 1980-----	123,255	364,571	277,934	765,760

1/ Reported on the last day of the month.

2/ Does not include imported receivers after June 1980, which were negligible in quantity.

3/ Does not include data for two firms accounting for less than 5 percent of total U.S. industry shipments.

Source: Compiled from data submitted in response to questionnaires of the U.S. International Trade Commission.

Table 3.--Complete color television receivers: U.S. producers' shipments (excluding exports) of U.S.-made and imported receivers, 1/ by screen size categories, by months, October 1978-December 1980

Period	Screen size category			
	17 inches and under	18 inches and 19 inches	20 inches and over	Total
Quantity (units)				
1978:				
October-----	135,952	355,440	299,363	790,755
November-----	125,832	359,928	263,465	749,225
December-----	113,327	321,103	211,548	645,978
Subtotal-----	375,111	1,036,471	774,376	2,185,958
Total, 1978-----	1,349,164	3,883,747	2,984,566	8,217,477
1979:				
January-----	121,859	293,259	182,814	597,932
February-----	102,233	302,034	195,384	599,651
March-----	152,739	368,101	224,145	744,985
Subtotal <u>2/</u> -----	376,831	963,394	602,343	1,942,568
April-----	101,915	259,791	123,948	485,654
May-----	119,215	358,411	211,111	688,737
June-----	161,547	442,836	268,429	872,812
Subtotal-----	382,677	1,061,038	603,488	2,047,203
July-----	130,397	321,208	178,624	630,229
August-----	131,176	396,360	259,577	787,113
September-----	165,270	408,337	278,398	852,005
Subtotal-----	426,843	1,125,905	716,599	2,269,347
October-----	189,819	502,743	284,437	976,999
November-----	167,058	483,020	235,736	885,814
December-----	128,565	383,891	186,970	699,426
Subtotal-----	485,442	1,369,654	707,143	2,562,239
Total, 1979-----	1,671,793	4,519,991	2,629,573	8,821,357
1980:				
January-----	168,210	447,830	216,767	832,807
February-----	148,075	452,198	206,989	807,262
March-----	158,090	433,097	202,492	793,679
Subtotal-----	474,375	1,333,125	626,248	2,433,748
April-----	160,529	382,667	155,596	698,792
May-----	156,107	356,397	178,703	691,207
June-----	174,897	383,532	219,471	777,900
Subtotal-----	491,533	1,122,596	553,770	2,167,899
July-----	156,450	363,682	201,546	721,678
August-----	148,496	405,635	228,111	782,242
September-----	185,623	514,577	287,359	987,559
Subtotal-----	490,569	1,283,894	717,016	2,491,479
October-----	213,170	555,016	258,823	1,028,009
November-----	171,864	457,937	200,238	830,039
December-----	154,273	433,781	179,220	767,274
Subtotal-----	539,307	1,477,734	638,281	2,625,322
Total, 1980-----	1,995,784	5,187,349	2,535,315	9,718,448

See footnotes at end of table.

Table 3.--Complete color television receivers: U.S. producers' shipments (excluding exports) of U.S.-made and imported receivers, 1/ by screen size categories, by months, October 1978-December 1980--Continued

Period	Screen size category			
	17 inches and under	18 inches and 19 inches	20 inches and over	Total
	Value (1,000 dollars)			
1978:				
October-----	31,512	105,279	136,954	273,745
November-----	29,894	107,660	122,257	259,811
December-----	28,171	95,567	104,540	228,278
Subtotal-----	89,577	308,506	363,751	761,834
Total, 1978-----	322,638	1,135,862	1,344,190	2,802,690
1979:				
January-----	28,416	88,563	87,150	204,129
February-----	24,243	91,861	92,101	208,205
March-----	37,069	109,008	104,180	250,257
Subtotal <u>2/</u> -----	89,728	289,432	283,431	662,591
April-----	25,002	76,123	56,570	157,695
May-----	31,617	112,156	98,245	242,018
June-----	39,767	135,770	127,481	303,018
Subtotal-----	96,386	324,049	282,296	702,731
July-----	31,318	97,127	83,518	211,963
August-----	32,232	121,338	122,479	276,049
September-----	39,878	124,717	131,725	296,320
Subtotal-----	103,428	343,182	337,722	784,332
October-----	47,970	151,930	136,857	336,757
November-----	41,133	140,481	114,472	296,086
December-----	30,788	109,966	95,609	236,363
Subtotal-----	119,891	402,377	346,938	869,206
Total, 1979-----	409,433	1,359,040	1,250,387	3,018,860
1980:				
January-----	41,474	135,696	107,078	284,248
February-----	37,846	137,886	97,847	273,579
March-----	38,416	130,555	96,850	265,821
Subtotal-----	117,736	404,137	301,775	823,648
April-----	38,963	114,263	73,967	227,193
May-----	38,991	111,702	89,748	240,441
June-----	42,975	122,946	113,908	279,829
Subtotal-----	120,929	348,911	277,623	747,463
July-----	39,271	117,986	100,583	257,840
August-----	35,742	127,874	118,113	281,729
September-----	45,567	161,752	142,126	349,445
Subtotal-----	120,580	407,612	360,822	889,014
October-----	51,550	174,820	130,679	357,049
November-----	41,488	141,687	101,571	284,746
December-----	37,929	135,844	91,030	264,803
Subtotal-----	130,967	452,351	323,280	906,598
Total, 1980-----	490,212	1,613,011	1,263,500	3,366,723

1/ Does not include imported receivers after June 1980, which were negligible.

2/ Does not include data for two firms accounting for less than 5 percent of total U.S. industry shipments.

Source: Compiled from data submitted in response to questionnaires of the U.S. International Trade Commission.

Table 4.--Complete color television receivers: U.S. producers exports of U.S.-made receivers, by screen size categories, by months, July-December 1980

Period	Screen size category			
	17 inches	18 inches	20 inches	Total
	and under	and 19 inches	and over	
Quantity (units)				
1980:				
July-----	32,470	35,752	8,745	76,967
August-----	12,460	46,974	10,634	70,068
September-----	33,029	50,659	14,850	98,538
Subtotal-----	77,959	133,385	34,229	245,573
October-----	19,769	44,676	11,413	75,858
November-----	21,538	15,559	2,593	39,690
December-----	12,373	22,001	1,838	36,212
Subtotal-----	53,680	82,236	15,844	151,760
Value (1,000 dollars)				
July-----	8,064	11,662	3,989	23,715
August-----	3,180	14,763	5,293	23,236
September-----	8,603	16,810	6,783	32,196
Subtotal-----	19,847	43,235	16,065	79,147
October-----	4,644	15,977	6,131	26,752
November-----	5,340	5,774	1,354	12,468
December-----	3,158	7,704	1,361	12,223
Subtotal-----	13,142	29,455	8,846	51,443

Table 5.--Color television receivers: Average number of persons employed and man-hours worked in the production of color television receivers ^{1/} in those establishments where complete television receivers are produced, by months, October 1978-December 1980

Period	Average number of persons employed		Man-hours worked	
	All persons	Production and related workers	All persons	Production and related workers
			1,000	1,000
	Number	Number	man-hours	man-hours
1978:				
October-----	28,559	24,783	4,985	4,229
November-----	28,162	24,354	4,783	4,049
December-----	27,266	23,464	4,431	3,890
Average or subtotal-----	27,996	24,201	14,199	12,168
Average or total, 1978----	27,593	23,855	56,987	48,292
1979:				
January-----	25,886	21,909	4,323	3,586
February-----	25,773	21,831	4,228	3,535
March-----	25,700	21,729	4,838	4,110
Average or subtotal ^{2/} ----	25,786	21,823	13,389	11,231
April-----	24,972	21,410	4,083	2,967
May-----	25,601	21,964	4,331	3,232
June-----	26,417	22,697	5,267	3,796
Average or subtotal-----	25,663	22,024	13,681	9,995
July-----	26,639	22,855	4,353	3,716
August-----	26,700	22,948	4,522	3,812
September-----	27,002	23,478	4,695	4,075
Average or subtotal-----	26,780	23,094	13,570	11,603
October-----	27,164	23,549	4,842	4,132
November-----	26,180	22,714	4,679	3,990
December-----	26,254	22,550	4,111	3,482
Average or subtotal-----	26,532	22,937	13,632	11,604
Average or total, 1979----	26,190	22,470	54,272	44,433
1980:				
January-----	24,729	21,207	4,355	3,737
February-----	24,324	20,789	4,240	3,612
March-----	24,392	20,852	4,495	3,842
Average or subtotal-----	24,482	20,949	13,090	11,191
April-----	24,876	21,721	4,237	3,675
May-----	25,446	22,219	4,288	3,724
June-----	25,228	22,068	4,727	4,148
Average or subtotal-----	25,183	22,003	13,252	11,547
July-----	24,525	21,379	3,919	3,376
August-----	24,994	21,823	4,037	3,521
September-----	25,324	22,158	4,511	3,928
Average or subtotal-----	24,947	21,786	12,467	10,825
October-----	25,387	22,300	4,626	4,056
November-----	25,118	22,012	4,201	3,670
December-----	24,724	21,609	3,844	3,303
Average or subtotal-----	25,076	21,975	12,671	11,029
Average or total, 1980----	24,859	21,678	51,480	44,592

^{1/} Does not include color picture tubes.

^{2/} Does not include data for two firms accounting for less than 5 percent of total U.S. industry shipments.

Table 6.--Color television receivers: Average unit net selling price of U.S. producers, by selected screen size categories, by months, October 1978-December 1980

Period	Screen size category			
	13 inches	14 inches- 17 inches 1/	18 inches and 19 inches	20 inches and over
1978:				
October-----	215.94	287.07	296.19	457.48
November-----	218.46	294.31	299.12	464.04
December-----	221.14	289.05	297.62	494.17
Average-----	218.25	290.05	297.65	469.73
Average, 1978-----	218.30	291.26	292.47	450.38
1979:				
January-----	214.90	277.61	302.00	476.71
February-----	212.46	293.43	304.14	471.38
March-----	225.12	282.52	296.14	464.79
Average 2/-----	218.28	283.92	300.43	470.55
April-----	220.33	307.15	293.02	456.40
May-----	237.16	306.45	312.93	465.37
June-----	227.45	296.31	306.59	474.92
Average-----	228.32	302.95	305.41	467.77
July-----	227.85	328.14	302.38	467.56
August-----	222.36	315.57	306.13	471.84
September-----	227.18	299.96	305.43	473.15
Average-----	225.97	311.18	304.81	471.28
October-----	227.32	310.73	302.20	481.15
November-----	222.50	315.37	290.84	485.59
December-----	220.74	290.66	286.45	511.34
Average-----	223.82	306.72	293.78	490.62
Average, 1979-----	224.02	300.88	300.67	475.51
1980:				
January-----	230.41	300.18	303.01	493.98
February-----	228.20	314.72	304.92	472.72
March-----	231.97	314.55	301.45	478.29
Average-----	230.38	308.51	303.15	481.88
April-----	233.39	305.36	298.60	475.38
May-----	238.09	322.62	313.42	502.22
June-----	235.96	327.68	320.56	519.01
Average-----	235.70	319.23	310.81	501.33
July-----	233.36	306.64	324.42	499.06
August-----	233.66	288.25	315.24	517.79
September-----	242.20	306.96	314.34	494.59
Average-----	236.97	301.17	317.48	503.23
October-----	240.17	285.60	314.98	504.90
November-----	241.45	272.58	309.40	507.25
December-----	233.51	316.56	313.16	507.92
Average-----	238.60	290.48	312.45	506.49
Average, 1980-----	235.50	3/	310.95	498.36

1/ Covered 16-inch and 17-inch sizes before July 1980.

2/ Does not include data for two firms accounting for less than 5 percent of total U.S. industry shipments.

3/ Meaningless, since size categories changed in July 1980.

Source: Compiled from data submitted in response to questionnaires of the U.S. International Trade Commission.

UNITED STATES
INTERNATIONAL TRADE COMMISSION
WASHINGTON, D.C. 20436

OFFICIAL BUSINESS

ADDRESS CORRECTION REQUESTED

Postage And Fees Paid
U.S. International Trade Commission



ADDRESS CHANGE

- ☐ Remove from List
 - ☐ Change as Shown
- Please detach address
label and mail to address
shown above.