

COLOR TELEVISION RECEIVERS: U.S. PRODUCTION, SHIPMENTS, INVENTORIES, EXPORTS, EMPLOYMENT, MAN- HOURS, AND PRICES, SECOND CALENDAR QUARTER 1981

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

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Highlights

April-June 1981 U.S. production of color television receivers amounted to 2.8 million sets, which was 1.7 percent greater than production in the corresponding quarter of 1980, but 64,000 less sets than in January-March 1981. U.S. producers' shipments of all screen sizes in April-June 1981 totaled to 2.4 million sets, which was 9.4 percent greater than such shipments in the corresponding 1980 period. Shipments of sets 20 inches and over increased by 17.9 percent, shipments in the 18- and 19-inch screen-size category increased by 10.6 percent, and those in the 17-inch-and-under category increased by 2.0 percent.

Ending June 1981 total inventories of U.S. producers were 17.9 percent higher than June 1980 levels. Inventories of all screen-size categories ranged from a 5.5-percent decrease in the category of 20 inches and over to an increase of 64.2 percent in the category of 17 inches and under.

Exports of U.S.-made color sets amounted to 121,000 sets in April-June 1981, compared with 158,000 sets in the preceding quarter.

The number of all persons and of production and related workers employed by U.S. producers declined by 8.0 and 9.1 percent, respectively, in April-June 1981, compared with figures in the corresponding period of 1980.

Average unit net selling prices of U.S. producers rose for all screen sizes except the category of 14 through 17 inches. In April-June 1981, as compared with prices in the corresponding 1980 quarter, average quarterly prices in the 13-inch category increased by \$4.31 (1.8 percent); in the category of 18 and 19 inches, by \$8.29 (2.7 percent); and in the 20 inches and over category, by \$7.92 (1.6 percent). Average quarterly prices in the category of 14 through 17 inches decreased by \$13.68 (4.3 percent).

Capsulized Trend Analysis

U.S. production

U.S. production of color television receivers in April-June 1981 amounted to 2.8 million sets, 1.7 percent higher than production in April-June 1980 and 25.5 percent higher than in April-June 1979. Compared with production in April-June 1980, production in April-June 1981 was higher in screen size categories of 17 inches and under and of 20 inches and over, but was slightly lower in the category of 18 inches and 19 inches. The share of production contributed by each of the three major screen-size categories changed minimally from the first quarter of 1981 to the second quarter of 1981.

U.S. producers' shipments

U.S. producers' shipments of color television receivers in April-June 1981 were 5.1 percent less in quantity than those in the first quarter. In the second quarter of 1981, shipments amounted to 2.4 million sets, which were 9.4 percent greater than those in the corresponding period of 1980, and 15.9 percent higher than shipments in the second quarter of 1979. Compared with shipments in the second quarter of 1980, current shipments rose in all categories of screen sizes. Total April-June 1981 shipments recorded a greater increase over shipments in the corresponding period of 1980 (9.4 percent) than that recorded between the corresponding periods of 1980 and 1979 (5.9 percent).

U.S. producers' inventories

U.S. producers' inventories of color television receivers at the end of June 1981 were 1,164,626 units, 17.9 percent higher than the number at the end of June 1980. Quarterly average inventories for April-June 1981 were 29.4 percent higher than inventories in the corresponding period of 1980, but

only 20.5 percent higher than those in April-June 1979. Stocks of sets 17 inches and under increased by an average of 71.9 percent in the second quarter of 1981 compared with the levels in the corresponding period of 1980. In the category of 18 and 19 inches, average inventories increased by 34.6 percent, and in screen sizes of 20 inches and over, by 3.2 percent, compared with April-June 1980 levels. Compared with the inventories of January-March 1981, current average quarterly inventories for screen-size categories 17 inches and under were 64.5 percent higher; for 18 and 19 inches, 38.5 percent higher; and for 20 inches and over, 24.6 percent higher.

U.S. producers' exports

U.S. producers' exports of color television receivers amounted to 121,000 sets during April-June 1981, compared with 158,000 sets exported during the preceding quarter. The category of 18 and 19 inches accounted for 58,000 sets, or 47.8 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 April-June 1981 was 20,010 persons, down 9.1 percent from 22,003 persons in the corresponding period of 1980. The average number of all workers was 23,174 down from 25,183 in April-June 1980. Also, the number of man-hours worked by production and related workers was 10.5 million in April-June 1981, down from 11.5 million in the corresponding period of 1980. 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 of U.S. producers were higher for three of the four major screen-size categories during April-June 1981, compared with those in the corresponding quarter of 1980. The average prices of the 13-inch size increased by \$4.31 (1.8 percent), those of the 18-and 19-inch sizes increased by \$8.29 (2.7 percent), those of the 20 inches and over sizes increased by \$7.92 (1.6 percent), and those of the 14- through 17-inch sizes decreased by \$13.68 (4.3 percent). These increases are well under the inflation rate as measured by the Consumer Price Index.

Screen-size categories showed increased average quarterly prices during April-June 1981 compared with prices in the first quarter of the year. The 13-inch size increased by 28 cents, 14- through 17-inch sizes increased by \$33.80, the 18- and 19-inch sizes, by \$3.43, and the 20 inches and over sizes, by \$5.33.

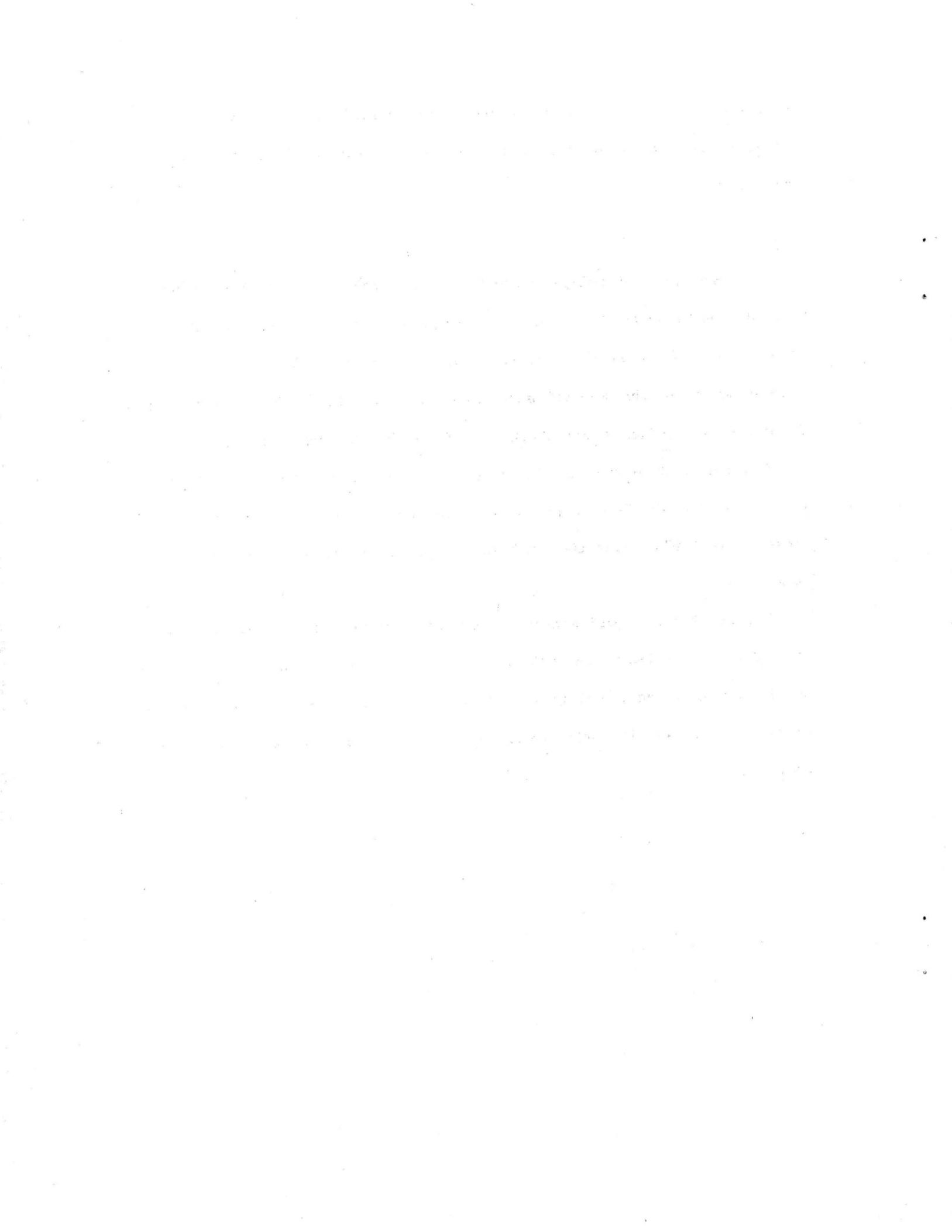


Table 1.--Complete color television receivers: U.S. production, by screen size categories, by months, April 1979-June 1981

(In units)

Period	Screen-size category				Total
	17 inches and under	18 inches and 19 inches	20 inches and over		
	:	:	:	:	
1979:	:	:	:	:	:
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-----:	135,471	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
1981:	:	:	:	:	:
January-----:	183,392	477,975	214,489		875,856
February-----:	206,270	492,026	226,572		924,868
March-----:	243,169	557,933	232,915		1,034,017
Subtotal-----:	632,831	1,527,934	673,976		2,834,741
April-----:	199,712	504,028	194,254		897,994
May-----:	190,428	438,908	238,223		867,559
June-----:	234,021	504,467	266,416		1,004,904
Subtotal-----:	624,161	1,447,403	698,893		2,770,457
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:	:	:	:	:	:

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' shipments
 (excluding exports) of U.S.-made and imported receivers, 1/ by screen size,
 categories, by months, April 1979-June 1981

Period	Screen-size category				Total
	17 inches and under	18 inches and 19 inches	20 inches and over		
Quantity (units)					
1979:	:	:	:	:	:
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 :	533,770 :	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 :	556,016 :	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 :	1,447,734 :	638,281 :	2,625,322	
Total, 1980-----:	1,995,784 :	5,187,349 :	2,535,315 :	9,718,448	
1981:	:	:	:	:	:
January-----:	172,595 :	414,181 :	213,555 :	800,331	
February-----:	163,798 :	433,100 :	190,809 :	787,707	
March-----:	204,366 :	478,393 :	228,706 :	911,465	
Subtotal-----:	540,759 :	1,325,674 :	633,070 :	2,499,503	
April-----:	129,566 :	394,039 :	126,946 :	650,551	
May-----:	144,962 :	355,359 :	188,442 :	688,763	
June-----:	226,842 :	492,248 :	313,768 :	1,032,858	
Subtotal-----:	501,370 :	1,241,646 :	629,156 :	2,372,172	
	:	:	:	:	:

See footnote at end of table.

Table 2.--Complete color television receivers: U.S. producers' shipments
 (excluding exports) of U.S.-made and imported receivers, ^{1/} by screen size,
 categories, by months, April 1979-June 1981--continued

Period	Screen-size category					Total
	17 inches and under	18 inches and 19 inches	20 inches and over			
	Value (1,000 dollars)					
1979:						
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	1,250,040			3,018,513
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
1981:						
January-----	42,326	132,799	106,502			281,627
February-----	39,168	136,734	97,959			273,861
March-----	49,465	148,936	114,554			312,955
Subtotal-----	130,959	418,469	319,015			868,443
April-----	30,995	123,706	64,082			218,783
May-----	36,067	113,873	98,096			248,036
June-----	57,167	158,634	158,220			374,021
Subtotal-----	124,229	396,213	320,398			840,840

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

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' inventories 1/ of U.S.-made and imported receivers, 2/ by screen size categories, by months, April 1979-June 1981

(In units)

Period	Screen-size category				Total
	17 inches and under	18 inches and 19 inches	20 inches and over		
	:	:	:	:	
1979:	:	:	:	:	:
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	254,617		554,297
Average, 1979-----:	122,224	358,159	294,048		774,431
1980:	:	:	:	:	:
January-----:	103,300	231,686	235,492		570,478
February-----:	96,406	220,195	250,217		566,818
March-----:	96,992	247,273	268,971		613,236
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
1981:	:	:	:	:	:
January-----:	125,765	391,749	259,716		777,230
February-----:	149,037	433,920	272,324		855,281
March-----:	170,642	479,418	262,471		912,531
Average-----:	148,481	432,029	264,838		848,348
April-----:	226,753	562,919	318,151		1,107,823
May-----:	258,117	626,023	361,377		1,245,517
June-----:	248,044	606,415	310,167		1,164,626
Average-----:	244,304	598,453	329,898		1,172,655
:	:	:	:	:	:

1/ Reported on the last day of the month.

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

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 1980-June 1981

Period	Screen-size category				Total
	17 inches and under	18 inches and 19 inches	20 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
1981:					
January-----:	16,058 :	20,870 :	7,901 :		44,829
February-----:	17,398 :	26,285 :	9,284 :		52,967
March-----:	18,449 :	33,317 :	8,152 :		59,918
Subtotal-----:	51,905 :	80,472 :	25,337 :		157,714
April-----:	14,035 :	16,070 :	5,428 :		35,533
May-----:	13,606 :	15,239 :	2,121 :		30,966
June-----:	17,867 :	26,545 :	10,014 :		54,426
Subtotal-----:	45,508 :	57,854 :	17,563 :		120,925
	Value (1,000 dollars)				
1980:					
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
1981:					
January-----:	3,905 :	7,364 :	4,101 :		15,370
February-----:	4,475 :	9,086 :	4,536 :		18,097
March-----:	4,762 :	11,611 :	4,436 :		20,809
Subtotal-----:	13,142 :	28,061 :	13,073 :		54,276
April-----:	3,617 :	5,780 :	2,535 :		11,932
May-----:	3,667 :	5,524 :	1,139 :		10,330
June-----:	4,864 :	9,719 :	5,017 :		19,600
Subtotal-----:	12,148 :	21,023 :	8,691 :		41,862
	:	:	:		

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

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, April 1979-June 1981

Period	Average number of persons employed		Man-hours worked	
	All persons	Production and related workers	All persons	Production and related workers
		Number		1,000 man-hours
1979:				
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
1981:				
January-----	24,295	21,451	4,110	3,607
February-----	23,438	20,337	3,828	3,290
March-----	23,441	20,227	4,223	3,635
Average or subtotal----	23,723	20,671	12,161	10,532
April-----	23,161	20,048	3,843	3,291
May-----	23,261	20,105	3,867	3,314
June-----	23,098	19,880	4,456	3,856
Average or subtotal----	23,174	20,010	12,167	10,461

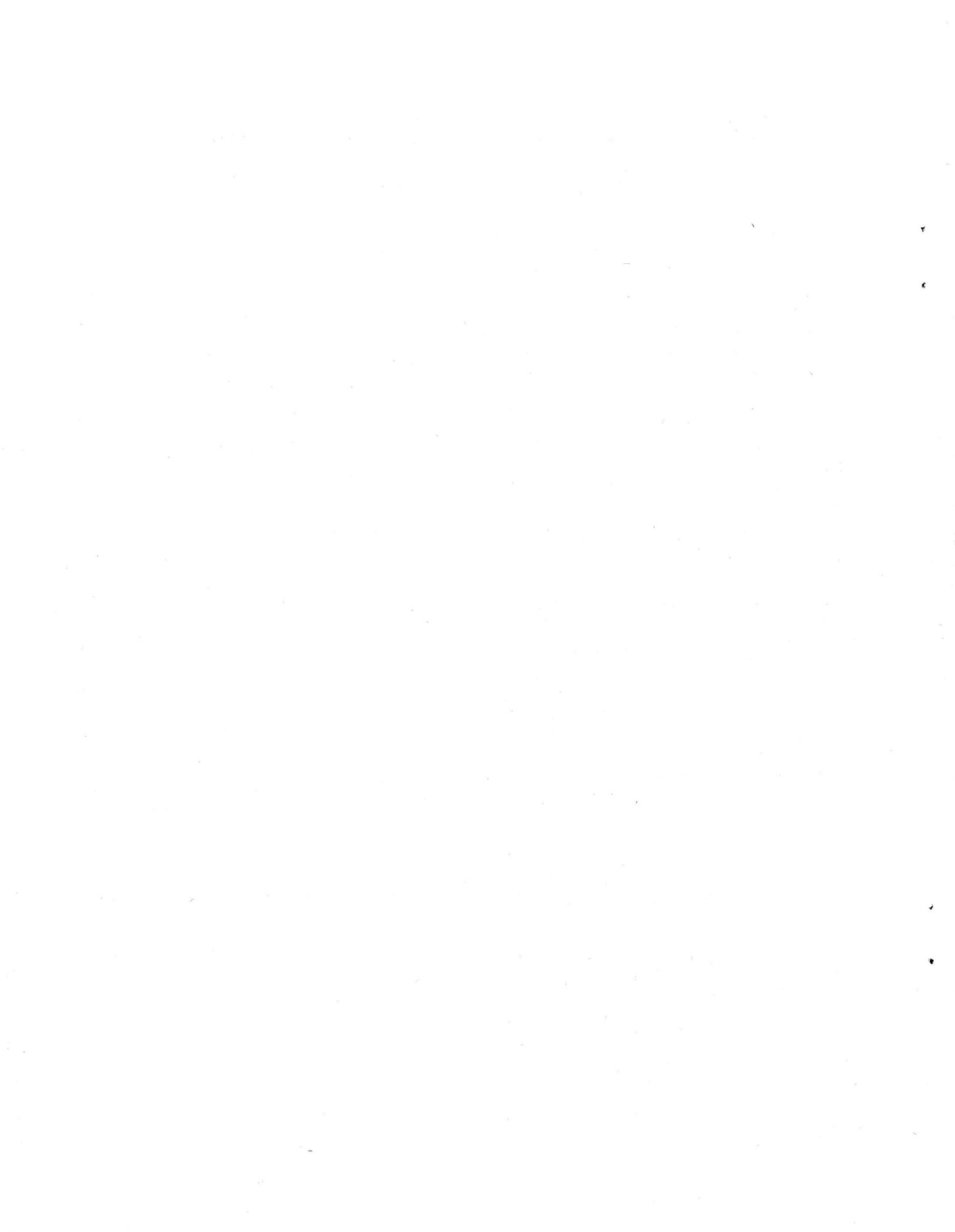
1/ Does not include color picture tubes.

Table 6.--Color television receivers: Average unit net selling price of U.S. producers, by selected screen size categories, by months, April 1979-June 1981

Period	Screen-size category				
	13 inches	14 inches- 17 inches 1/	:18 inches and: 19 inches	20 inches and over	
	:	:	:	:	
1979:	:	:	:	:	
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	2/	310.95	498.36	
1981:	:	:	:	:	
January-----:	239.61	281.68	320.63	498.71	
February-----:	237.05	274.18	315.71	513.39	
March-----:	241.97	260.10	311.33	500.88	
Average-----:	239.73	271.75	315.67	503.92	
April-----:	237.63	265.33	313.94	504.80	
May-----:	242.32	305.58	320.44	520.56	
June-----:	239.93	332.95	322.26	504.26	
Average-----:	240.01	305.55	319.10	509.25	
:	:	:	:	:	
:	:	:	:	:	

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

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





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