COLOR TELEVISION RECEIVERS: U.S. PRODUCTION, SHIPMENTS, INVENTORIES, IMPORTS, EMPLOYMENT, MAN-HOURS, AND PRICES, FOURTH CALENDAR QUARTER 1978

Report to the President on Investigation No. 332-95 Under Section 332 of the Tariff Act of 1930, as Amended

USITC PUBLICATION 939

FEBRUARY 1979

United States International Trade Commission / Washington, D.C. 20436

UNITED STATES INTERNATIONAL TRADE COMMISSION

COMMISSIONERS

Joseph O. Parker, Chairman
Bill Alberger, Vice Chairman
George M. Moore
Catherine Bedell
Paula Stern

Kenneth R. Mason, Secretary to the Commission

This report was prepared principally by
John T. Cutchin, Jr.

assisted by O. Zarnett Law

Machinery and Equipment Division
C. W. Daiker, Chief

Office of Industries
Norris A. Lynch, Director

Address all communications to
Office of the Secretary
United States International Trade Commission
Washington, D.C. 20436

NEWS
UNITED STATES INTERNATIONAL TRADE COMMISSION • Office of the Secretary • Washington, D.C. 20436

FOR RELEASE
February 14, 1979

CONTACT: JOHN T. CUTCHIN, JR.
(202) 523-0230
USITC 79-007

USITC REPORTS RESULTS OF SURVEY OF THE U.S. COLOR TV INDUSTRY

The United States International Trade Commission has completed its seventh quarterly survey of U.S. manufacturers of color television receivers to obtain data on economic factors indicative of conditions in the U.S. industry. The survey, required by Presidential Proclamation No. 4511, covers the fourth quarter of 1978. The Commission has previously reported data obtained for the fourth quarter of 1976, the year 1977, and the first three quarters of 1978 (USITC Publications 866, 886, 901, and 925).

The Commission has submitted detailed data in confidence to the Special Representative for Trade Negotiations who is responsible for monitoring the Orderly Marketing Agreement implemented by the Presidential Proclamation. Data which do not reveal operations of individual firms have been aggregated in USITC Publication 939. These monthly data cover January 1977 through December 1978 and show production, shipments, inventories, imports, employment, man-hours, and certain prices of U.S. producers. Copies of the survey can be obtained by calling (202) 523-5178 or from the Office of the Secretary, United States International Trade Commission, 701 E St. NW, Washington, D.C. 20436.

Highlight

U.S. production of color television receivers in 1978 was 8.3 million sets, 18 percent higher than 1977. A shift to production of sets with screen sizes less than 20 inches was perceptible. U.S. producers' imports of complete sets increased 42 percent to 533,560 sets in 1978. Inventories of U.S. producers increased at a slightly lower rate than production. U.S. producers' shipments of U.S.-made and imported sets kept pace with U.S. production, but sales of sets of screen sizes 20 inches and over must have been disappointing to producers in the fourth quarter. Employment continued a slow, general decline, the apparent result of imported and purchased subassemblies and increased productivity. U.S. producers' prices were lower on the average for sets 20 inches and over in 1978 but were more than $13 higher in the fourth quarter than in the same quarter of 1977. The prices of 18- and 19-inches sets were slightly higher for the fourth quarter of 1978 but lower on average for the year. Average prices for screen sizes 13 inches and 16 and 17 inches were substantially lower for the fourth quarter and 13-inches sets were lower for the year. Prices for screen sizes of 16 and 17 inches were marginally higher for the year.

Capsulized Trend Analysis

U.S. production

U.S. production in 1978 was 8.3 million sets, 18 percent higher than in 1977. Although production was higher in the three major screen-size categories of 17 inches and under, 18 and 19 inches, and 20 inches and over, the share of production by major screen size category shifted. Sizes 20 inches and over accounted for only 38 percent of production in 1978 as opposed to 42 percent in 1977. The other major categories, particularly 18 and 19 inches, increased in share of total production. Production was higher in each quarter of 1978 compared to 1977 for each major screen-size category except for 20 inches and over in the fourth quarter when it dropped by about 1 percent. The largest drop occurred in the last 2 months of 1978.

U.S. producers' imports

U.S. producers' imports of color sets increased from 376,610 units in 1977 to 533,560 units, or 42 percent, in 1978. A major increase, 54 percent, occurred in sets with screen sizes 18 inches and over. For sets 17 inches and under, the increase was 24 percent. Except in the second quarter of 1978, substantial increases occurred in each quarter. U.S. producers' imports were equal to 5.4 percent of U.S. production in 1977 and 6.4 percent in 1978.

U.S. producers' inventories

U.S. producers' inventories ended 1978 at 769,633 sets, 17 percent higher than in 1977. Inventories shifted to a greater emphasis on the 18- and 19-inches screen size categories which accounted for 47 percent of inventory at the end of 1978 as opposed to only 41 percent at the end of 1977. For

screen size categories of 17 inches and under, the share of inventory diminished 6 points to 14 percent and for categories of 20 inches and above, the share dropped 1 point to about 38 percent. At the end of 1978, inventories were 9 percent of the 1978 shipments, the same percent as at the end of 1977 and appeared to be in line with a projected sales year, or first quarter, similar to 1977 or 1978.

U.S. producers' shipments

U.S. producers' shipments for 1978 were 8.2 million sets, 1.1 million more or 16 percent higher than in 1977. Shipments in all major screen size categories were higher in each quarter in 1978 than in 1977 but were higher in the fourth quarter by only 1,364 sets in the 20 inches and over category owing to a disappointing performance in December. In the 17 inches and under category, the increase amounted to 10 percent, in the 18 and 19 inches category 27 percent, and in the 20 inches and over category 6 percent for the year.

U.S. employment

Employment in U.S. producers' establishments continued a slow, general decline not only in production and related workers but also in managerial employees. The average number of production and related workers employed during the year decreased to 23,855 during 1978 from 24,976 in 1977 and total workers declined to 27,593 from 29,104.

The decline in employment occurred during a year of significantly increased production. Some of the employment loss may be attributable to the reduced output and eventual cessation of production by Admiral. Those employers which supplanted Admiral's production tended to use more imported and purchased subassemblies or to be more productive. Some producers imported and sold more imported sets in 1978 than in 1977.

Prices

The average unit net selling price for screen size categories of 20 inches and over was $450.38 for 1978, $2.53 lower than in 1977. Average prices were substantially lower for screen size categories of 13 inches and 18 and 19 inches, but the average price increased slightly for 16 and 17 inches.

The average unit net selling price of sets 20 inches and over for the fourth quarter of 1978 was $469.73, $13.06 greater than the price for the fourth quarter of 1977. A slight increase also took place in the 18- and 19-inches category. By contrast, prices of the 13 inches sets and high volume 18- and 19-inches sets were generally considerably lower in the fourth quarter of 1978 than the corresponding quarter of 1977.

Table 1.--Complete color television receivers: U.S. production, by screen size categories, by months, January 1977-December 1978

(In units)

Period	Screen size category			
	17 inches and under	18 inches and 19 inches	20 inches and over	Total
1977:				
January	76,373	207,207	188,184	471,764
February	83,641	210,928	218,312	512,881
March	99,896	285,052	238,395	623,343
Subtotal	259,910	703,187	644,891	1,607,988
April	98,924	232,384	199,033	530,341
May	87,407	251,345	268,590	607,342
June	111,106	273,550	301,970	686,626
Subtotal	297,437	757,279	769,593	1,824,309
July	67,161	164,233	163,174	394,568
August	97,459	242,655	270,524	610,638
September	92,636	303,115	296,512	692,263
Subtotal	257,256	710,003	730,210	1,697,469
October	90,930	321,983	284,978	697,891
November	75,212	285,871	285,712	646,795
December	59,204	235,469	235,909	530,582
Subtotal	225,346	843,323	806,599	1,875,268
Total, 1977	1,039,949	3,013,792	2,951,293	7,005,034
1978:				
January	85,446	265,470	239,676	590,592
February	95,427	276,565	255,765	627,757
March	116,808	302,323	267,595	686,726
Subtotal	297,681	844,358	763,036	1,905,075
April	127,413	299,417	239,847	666,677
May	126,561	313,077	242,932	682,570
June	143,768	344,554	288,735	777,057
Subtotal	397,742	957,048	771,514	2,126,304
July	73,827	230,981	187,648	492,456
August	97,781	359,956	313,177	770,914
September	110,407	389,666	305,940	806,013
Subtotal	282,015	980,603	806,765	2,069,383
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

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

Table 2.--Complete color television receivers: U.S. imports by producing establishments, by screen size categories, by months, January 1977-December 1978

Period	Screen size category		
	17 inches and under	18 inches and over 1/	Total
	Quantity (units)		
1977:			
January	10,556	5,871	16,427
February	4,424	2,195	6,619
March	11,215	8,070	19,285
Subtotal	26,195	16,136	42,331
April	11,973	7,553	19,526
May	24,027	19,880	43,907
June	30,066	26,447	56,513
Subtotal	66,066	53,880	119,946
July	5,685	16,244	21,929
August	19,342	24,122	43,464
September	7,383	29,220	36,603
Subtotal	32,410	69,586	101,996
October	17,436	33,635	51,071
November	9,852	26,874	36,726
December	4,308	20,232	24,540
Subtotal	31,596	80,741	112,337
Total, 1977	156,267	220,343	376,610
1978:			
January	4,625	24,172	28,797
February	11,518	24,926	36,444
March	20,906	27,226	48,132
Subtotal	37,049	76,324	113,373
April	4,998	22,418	27,416
May	15,679	24,273	39,952
June	19,205	30,553	49,758
Subtotal	39,882	77,244	117,126
July	20,105	25,666	45,771
August	23,028	27,965	50,993
September	9,370	29,167	38,537
Subtotal	52,503	82,798	135,301
October	24,743	30,581	55,324
November	26,207	38,696	64,903
December	13,384	34,149	47,533
Subtotal	64,334	103,426	167,760
Total, 1978	193,768	339,792	533,560

See footnote at end of table.

Table 2.--Complete color television receivers: U.S. imports by producing establishments, by screen size categories, by months, January 1977-December 1978--Continued

Period	Screen size category		
	17 inches and under	18 inches and over 1/	Total
	Value (1,000 dollars)		
1977:			
January	1,796	1,167	2,963
February	942	491	1,433
March	2,119	2,089	4,208
Subtotal	4,857	3,747	8,604
April	1,973	1,752	3,725
May	4,041	4,046	8,087
June	4,821	5,256	10,077
Subtotal	10,835	11,054	21,889
July	888	3,680	4,568
August	3,249	5,492	8,741
September	1,270	6,565	7,835
Subtotal	5,407	15,737	21,144
October	2,793	7,739	10,532
November	1,550	6,048	7,598
December	685	4,515	5,200
Subtotal	5,028	18,302	23,330
Total, 1977	26,127	48,840	74,967
1978:			
January	873	5,500	6,373
February	1,859	6,105	7,964
March	3,600	6,076	9,676
Subtotal	6,332	17,681	24,013
April	914	4,834	5,748
May	2,522	4,956	7,478
June	2,973	6,410	9,383
Subtotal	6,409	16,200	22,609
July	3,165	6,439	9,604
August	3,974	5,848	9,822
September	1,619	6,263	7,882
Subtotal	8,758	18,550	27,308
October	4,256	6,580	10,836
November	4,763	7,871	12,634
December	2,062	7,299	9,361
Subtotal	11,081	21,750	32,831
Total, 1978	32,580	74,181	106,761

1/ U.S. imports of complete color television receivers with a screen size of 20 inches or more 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, by screen size categories, by months, January 1977-December 1978

(In units)

Period	Screen size category			
	17 inches and under	18 inches and 19 inches	20 inches and over	Total
1977:				
January	208,233	205,612	207,235	621,080
February	203,650	206,198	209,061	618,909
March	229,246	218,683	209,854	657,783
Average	213,710	210,164	208,717	632,591
April	249,532	251,591	247,606	748,729
May	257,589	324,145	321,608	903,342
June	268,617	317,746	314,013	900,376
Average	258,579	297,827	294,409	850,815
July	238,767	300,568	281,239	820,574
August	251,917	303,994	268,374	824,285
September	214,809	295,997	246,917	757,723
Average	235,164	300,186	265,510	800,860
October	207,988	299,796	237,194	744,978
November	169,637	302,414	264,473	736,524
December	134,213	266,382	255,841	656,436
Average	170,612	289,530	252,503	712,645
Average, 1977	219,516	274,427	255,285	749,228
1978:				
January	141,356	302,977	315,092	759,425
February	141,502	256,826	322,755	721,083
March	149,926	245,404	302,858	698,188
Average	144,262	268,402	313,568	726,232
April	163,996	280,696	358,069	802,761
May	172,604	317,097	376,940	866,641
June	155,579	321,158	351,932	828,669
Average	164,060	306,317	362,314	832,690
July	146,937	311,241	323,551	781,729
August	135,673	288,788	320,082	744,543
September	124,328	301,382	317,555	743,265
Average	135,646	300,470	320,396	756,512
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

1/ Reported on the last day of the month.

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

Note.--Most respondents were unable to net their production, imports, and shipments with inventories. In all cases the error was small. No attempt was made to force the balance.

Table 4.--Complete color television receivers: U.S. producers' shipments (excluding exports) 1/of U.S.-made and imported receivers, by screen size categories, by months, January 1977-December 1978

Period	Screen size category			
	17 inches and under	18 inches and 19 inches	20 inches and over	Total
	Quantity (units)			
1977:				
January	85,107	213,507	189,667	488,281
February	84,883	207,726	210,348	502,957
March	89,377	258,868	229,937	578,182
Subtotal	259,367	680,101	629,952	1,569,420
April	88,681	187,993	158,991	435,665
May	103,342	211,683	196,106	511,131
June	126,596	293,080	299,479	719,155
Subtotal	318,619	692,756	654,576	1,665,951
July	90,097	197,488	187,554	475,139
August	108,093	254,591	277,795	640,479
September	130,077	318,308	303,479	751,864
Subtotal	328,267	770,387	768,828	1,867,482
October	111,762	340,978	289,453	742,193
November	117,336	305,276	257,172	679,784
December	96,579	273,826	226,387	596,792
Subtotal	325,677	920,080	773,012	2,018,769
Total, 1977	1,231,930	3,063,324	2,826,368	7,121,622
1978:				
January	73,796	246,459	172,858	493,113
February	97,170	340,911	243,193	681,274
March	122,018	318,973	264,483	705,474
Subtotal	292,984	906,343	680,534	1,879,861
April	87,682	289,564	190,355	567,601
May	108,506	292,540	217,961	619,007
June	144,076	352,575	322,745	819,396
Subtotal	340,264	934,679	731,061	2,006,004
July	89,730	252,312	205,650	547,692
August	122,851	369,634	298,438	790,923
September	128,224	384,308	294,507	807,039
Subtotal	340,805	1,006,254	798,595	2,145,654
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

See footnote at end of table.

Table 4.--Complete color television receivers: U.S. producers' shipments (excluding exports) 1/ of U.S.-made and imported receivers, by screen size categories, by months, January 1977-December 1978--Continued

Period	Screen size category			
	17 inches and under	18 inches and 19 inches	20 inches and over	Total
	Value (1,000 dollars)			
1977:				
January	21,023	65,901	83,950	170,874
February	20,972	63,781	93,942	178,695
March	21,447	77,657	102,859	201,963
Subtotal	63,442	207,339	280,751	551,532
April	21,086	55,640	70,267	146,993
May	26,100	65,207	89,253	180,560
June	30,980	88,686	137,955	257,621
Subtotal	78,166	209,533	297,475	585,174
July	21,323	58,710	84,824	164,857
August	26,132	74,294	124,988	225,414
September	30,504	91,838	139,050	261,392
Subtotal	77,959	224,842	348,862	651,663
October	27,153	100,555	131,319	259,027
November	27,831	89,873	117,452	235,156
December	23,438	83,156	104,242	210,836
Subtotal	78,422	273,584	353,013	705,019
Total, 1977	297,989	915,298	1,280,101	2,493,388
1978:				
January	18,219	73,513	79,301	171,033
February	23,107	97,038	105,905	226,050
March	28,440	92,349	118,656	239,445
Subtotal	69,766	262,900	303,862	636,528
April	20,400	81,000	81,047	182,447
May	26,836	84,799	94,348	205,983
June	34,672	102,394	141,204	278,270
Subtotal	81,908	268,193	316,599	666,700
July	21,040	73,557	92,859	187,456
August	30,002	111,803	133,175	274,980
September	30,345	110,903	133,944	275,192
Subtotal	81,387	296,263	359,978	737,628
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

1/ The quantity and value of exports are small and are revealing of the operations of individual firms.

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, January 1977-December 1978

Period	Average number of persons employed		Man-hours worked	
	All persons	Production and related workers	All persons	Production and related workers
	Number	Number	1,000 man-hours	1,000 man-hours
1977:				
January	27,022	22,935	4,361	3,612
February	27,132	22,959	4,352	3,608
March	27,623	23,602	4,988	4,179
Average or subtotal	27,259	23,165	13,701	11,399
April	28,500	24,363	4,861	4,101
May	29,506	25,468	5,256	4,480
June	30,106	25,897	5,876	4,977
Average or subtotal	29,371	25,243	15,993	13,558
July	31,229	26,513	4,186	3,519
August	30,968	26,460	5,477	4,676
September	30,377	26,339	5,387	4,686
Average or subtotal	30,858	26,437	15,050	12,881
October	29,256	25,359	4,929	4,201
November	29,033	25,158	4,953	4,218
December	28,493	24,655	4,817	4,099
Average or subtotal	28,927	25,057	14,698	12,517
Average or total, 1977	29,104	24,976	59,442	50,355
1978:				
January	26,501	23,426	4,463	3,767
February	26,973	23,728	4,552	3,906
March	26,410	23,177	4,948	4,238
Average or subtotal	26,628	23,444	13,963	11,911
April	27,610	22,875	4,374	3,640
May	26,712	22,997	4,634	3,859
June	27,671	23,928	5,604	4,672
Average or subtotal	27,331	23,267	14,612	12,171
July	28,204	24,101	4,162	3,532
August	28,454	24,654	4,983	4,172
September	28,592	24,764	5,068	4,338
Average or subtotal	28,417	24,506	14,213	12,042
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 subtotal, 1978	27,593	23,855	56,987	48,292

1/ Does not include color picture tubes.

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

Table 6.--Color television receivers: Average unit net selling price of U.S. producers, by selected screen size categories, by months, January 1977-December 1978

Period	Screen size category			
	13 inches	16 inches and 17 inches	18 inches and 19 inches	20 inches and over
1977:				
January	$226.11	$300.36	$308.66	$442.62
February	225.16	300.53	307.04	446.60
March	220.73	277.06	299.99	447.34
Average	223.72	291.68	304.87	445.67
April	212.64	270.20	295.97	441.96
May	222.69	289.38	308.04	455.13
June	222.28	284.35	302.60	460.65
Average	219.91	282.09	302.46	454.45
July	222.98	315.56	297.28	452.26
August	223.26	280.35	291.82	449.93
September	221.48	283.73	288.52	458.19
Average	222.48	288.95	291.86	453.76
October	226.90	305.94	294.90	453.68
November	223.25	289.61	294.40	456.71
December	226.50	302.01	303.68	460.46
Average	225.56	299.10	297.35	456.67
Average, 1977	223.03	289.47	298.79	452.91
1978:				
January	222.85	296.35	298.28	458.76
February	216.58	297.90	284.64	435.48
March	216.40	283.13	289.52	448.63
Average	217.83	292.05	290.07	446.51
April 1/	223.16	282.04	279.73	425.77
May 1/	216.93	320.21	287.87	432.87
June 1/	218.57	279.26	290.42	437.51
Average 1/	219.36	292.00	286.94	433.07
July	213.67	285.83	291.53	451.54
August	210.06	305.87	302.47	446.24
September	226.69	275.83	288.58	454.81
Average	216.81	289.18	294.19	450.86
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

1/ Revised.

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

Library Cataloging Data

U.S. International Trade Commission.
Color television receivers: U.S. production, shipments, inventories, imports, employment, man-hours, and prices, fourth calendar quarter 1978. Report to the President on investigation no. 332-95 under section 332 of the Tariff act of 1930, as amended. Washington, 1979.

13 p. illus. 28 cm. (USITC Publication 939)

1. Color television. 2. Television--Receivers and reception. 3. Television industry--U.S. I. Title.