

# Industry

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“If you have an apple and I have an apple and we exchange these apples, then you and I will still each have an apple. But if you have an idea and I have an idea and we exchange these ideas, then each of us will have two ideas.”

George Bernard Shaw





# Industry - Summary

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- The Australian economy recorded **25** consecutive years of economic growth up to 2015-16 and continues to stand out as one of the best [but slowing] performers among OECD countries. However...
- There is a noticeable [and increasing] divergence in industry performance.
- “Cyclical” and “Structural” changes dominate policy debate. Deciding what is **Structural** or not??
- **NATIONAL** and **STATE** trends can differ markedly [ consider mining and manufacturing changes ] - Even **WITHIN** a sector i.e Manufacturing: *INTRA*-State and *INTER*-State variance can be significant in the short and medium terms.
- the decline in the relative share of **Manufacturing** output and the accompanying increase in **Services** [Nationally] is a phenomenon shared by most major OECD economies.
- The **type** of job creation and the **location** of these new jobs imposes costs on some workers and regions, making **PLACE** more important than ever before.

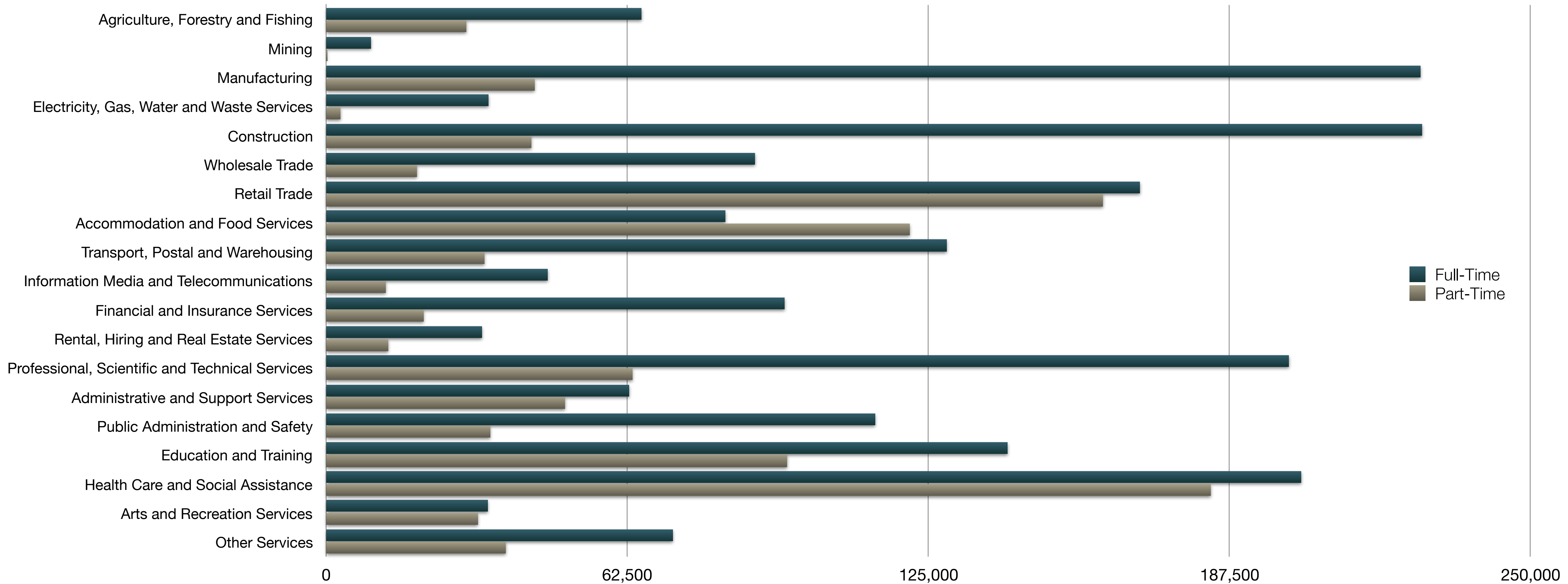
# Industry Sector of Employment Profile - Aust - Vict Compared

Australian Industry 2011	Number	%
Health Care and Social Assistance	1,167,573	11.6
Retail Trade	1,057,230	10.5
Manufacturing	902,818	9.0
Construction	828,838	8.2
Education and Training	804,306	8.0
Professional, Scientific and Technical	730,021	7.3
Public Administration and Safety	689,555	6.9
Accommodation and Food Services	650,356	6.5
Transport, Postal and Warehousing	479,115	4.8
Wholesale trade	403,789	4.0
Other Services	378,196	3.8
Financial and Insurance Services	377,346	3.8
Administrative and Support Services	323,720	3.2
Agriculture, Forestry and Fishing	249,825	2.5
Information Media and Telecommunications	178,187	1.8
Mining	176,429	1.8
Rental, Hiring and Real Estate Services	158,847	1.6
Arts and Recreation Services	151,548	1.5
Electricity, Gas, Water and Waste Services	115,579	1.1

Victorian Industry 2016	Number	%
Health Care and Social Assistance	385,900	12.8%
Retail Trade	330,200	10.9%
Manufacturing	270,400	8.9%
Construction	270,100	8.9%
Professional, Scientific and Technical	263,300	8.7%
Education and Training	237,200	7.8%
Accommodation and Food Services	204,000	6.7%
Transport, Postal and Warehousing	161,600	5.3%
Public Administration and Safety	148,000	4.9%
Financial and Insurance Services	115,200	3.8%
Administrative and Support Services	112,500	3.7%
Other Services	109,100	3.6%
Wholesale Trade	107,800	3.6%
Agriculture, Forestry and Fishing	94,400	3.1%
Arts and Recreation Services	64,900	2.1%
Information Media and Telecommunications	58,300	1.9%
Rental, Hiring and Real Estate Services	45,200	1.5%
Electricity, Gas, Water and Waste Services	36,700	1.2%
Mining	9,500	0.3%

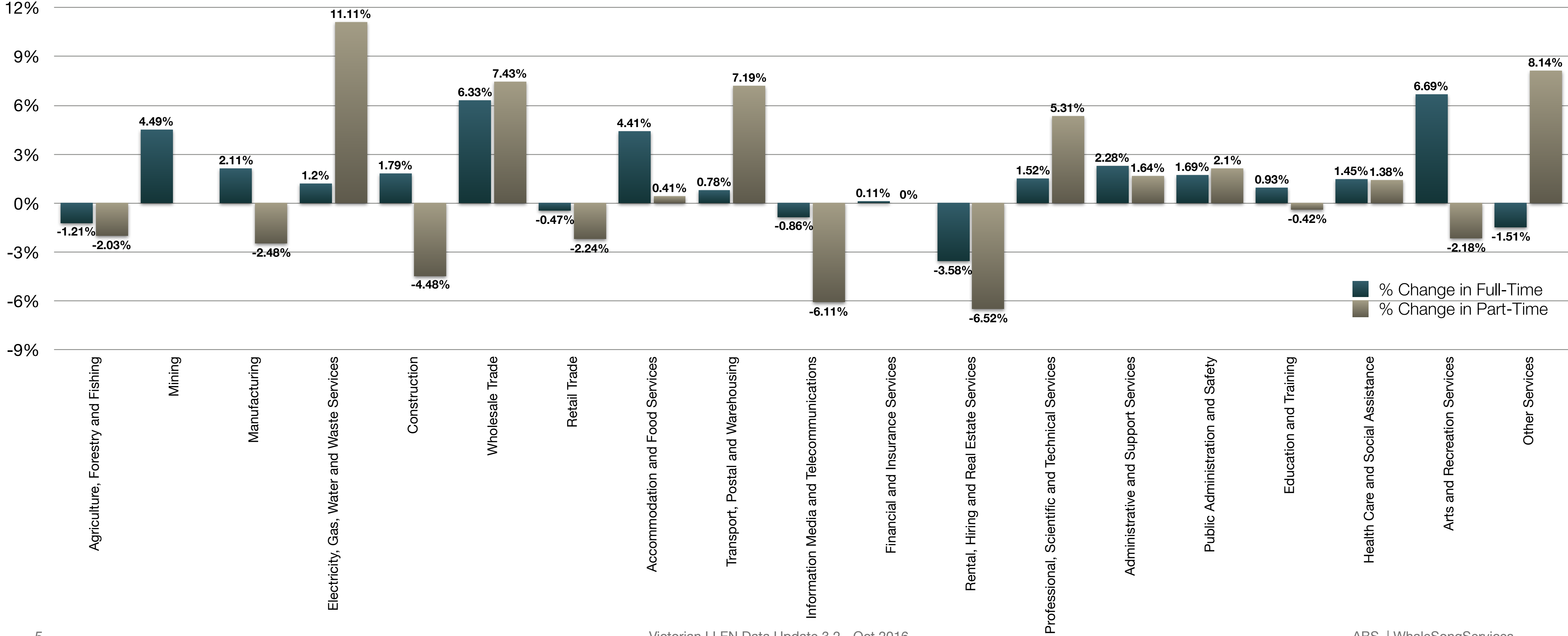
# Employment Status - Victoria

Full-Time & Part-Time Employment August 2016



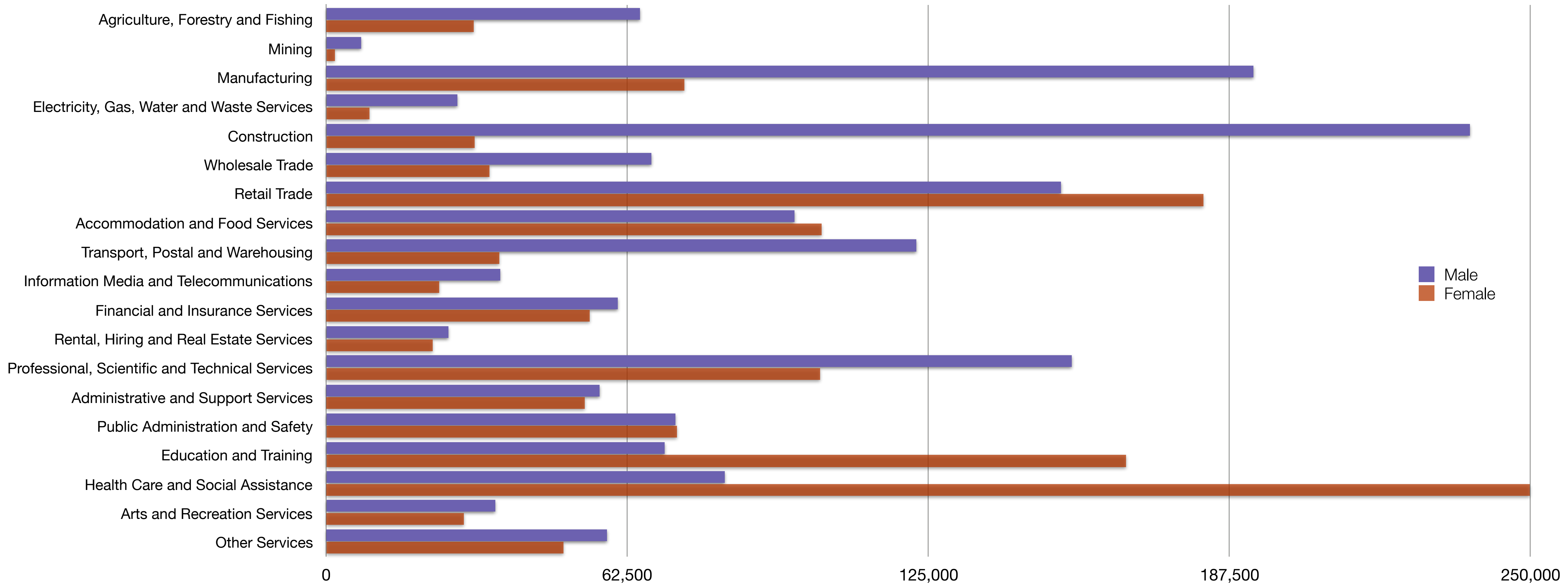
# Change in Employment Status - Victoria - Place Matters!

% Change in Full-Time & Part-Time Employment between May 2016 & August 2016



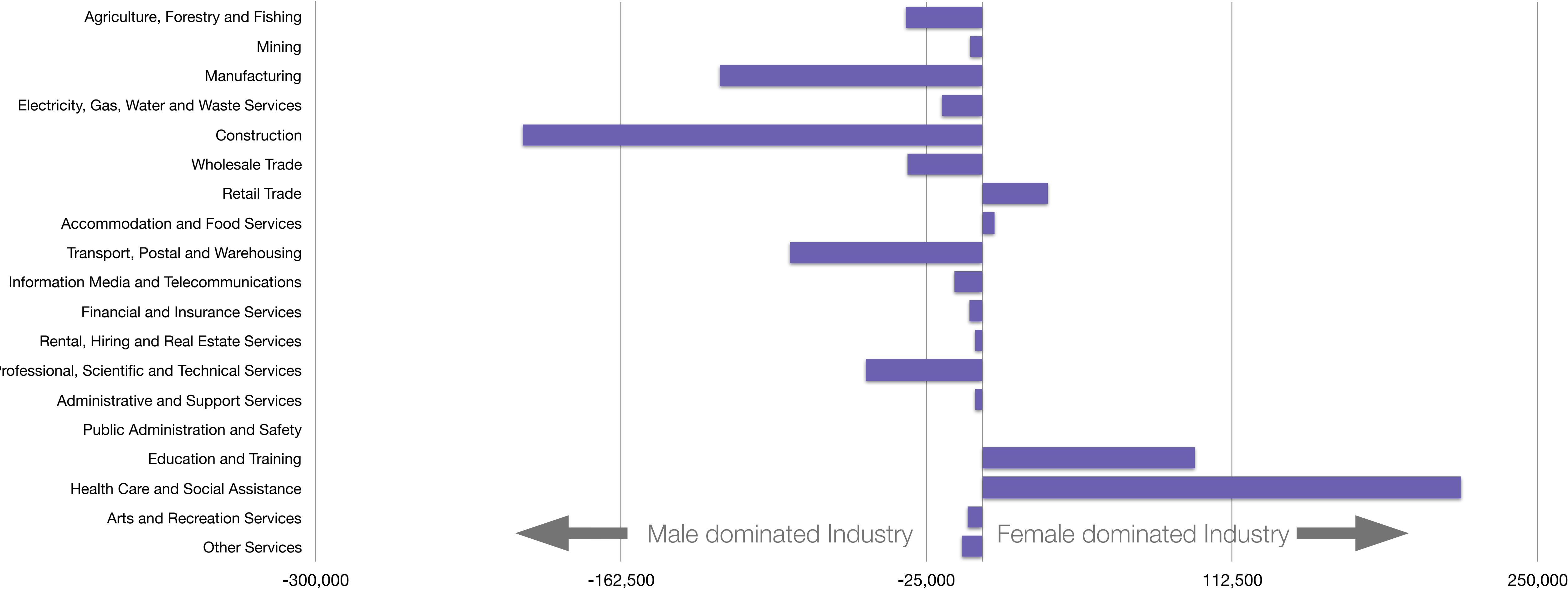
# Industry Employment by Gender - Victoria

Male and Female Employment Compared - August 2016



# Industry Employment by Gender - Victoria

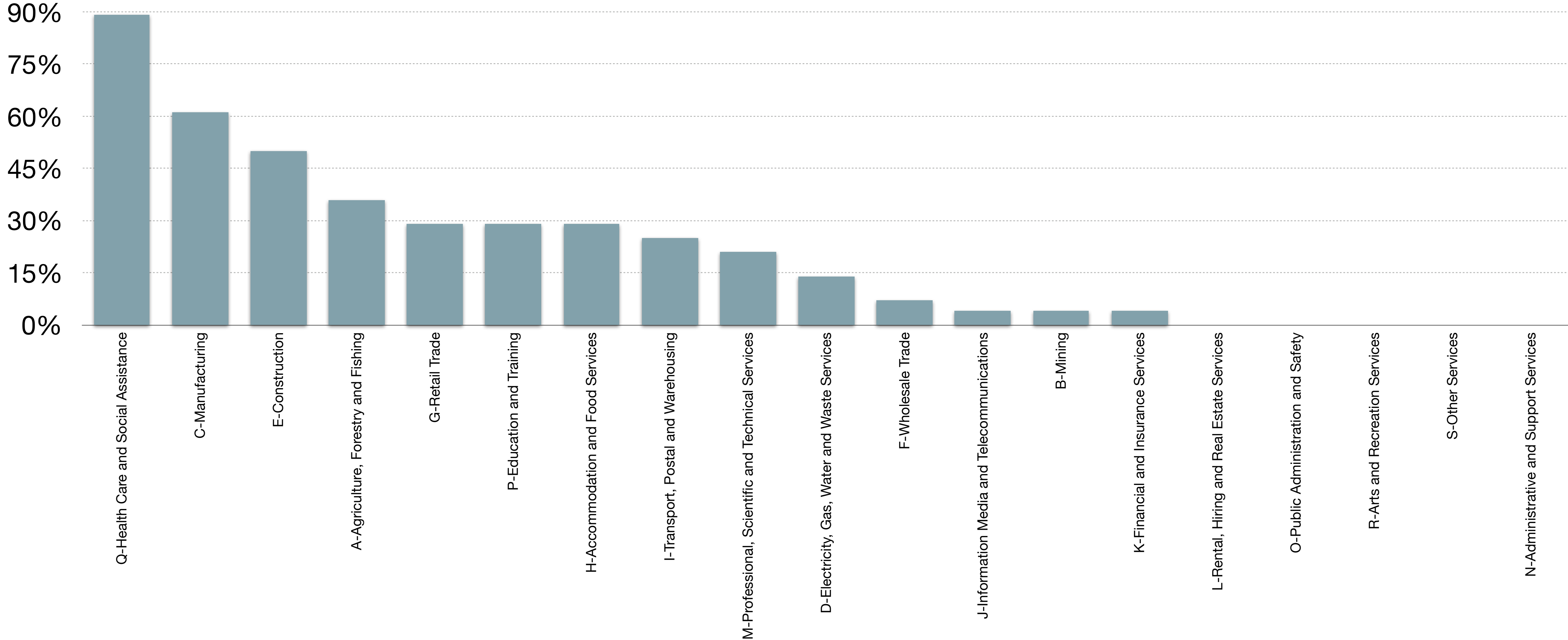
Male and Female Employment Compared - August 2016





# Industry Importance by LLEN

Industry Importance 2016





# Industry Dashboards

# Summary of Terms

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- The *detailed* industry summaries use the “**4 - digit**” **2006 ANZSIC** industry classification.
- This allows **SPECIFIC** focus on **discrete business activity Classes** [ and thus consideration of specific & related occupations and **skill pathways**] rather than the broader generalist **Industry Division** often used in public debate.
- This should support further collaboration across LLENs with Occupation, Skills or Pathway “Clusters”.

ANZIC 2006	Code	Activity
Division	C	Manufacturing
Subdivision	11	Food Product Manufacturing
Group	111	Meat and Meat Product Manufacturing
Class	1111	Meat Processing

# A Guide to Australian Industry Dashboards - Example

Industry Area	Industry Performance	Annual Growth 2011-2016	Annual Growth 2017-2022
Detailed 4 Digit ANSZIC Class	All industries go through periods of <b>growth, maturity</b> and <b>decline</b> . Research compares growth rate with GDP and a range of other factors including business numbers and technological change. This can be independent of Annual Growth	This is a “Traffic-Light” measure based on the Australian GDP Growth rate over this period. Approximately <b>2.4%</b>	This is a “Traffic-Light” measure based on FORECASTED Growth. Approximately <b>2.9%</b>
Z9999 - Daydreaming	Decline	2.4%	- 3.1%
X0007 - Sarcasm processing	Mature	2.9%	1.1%
Y8888-Advanced scepticism	Growing	4.0%	99.2%



# A-Agriculture, Forestry and Fishing

% Annual Change 2016-17

Industry	Revenue	Establishments	Enterprises	Employment	Exports	Imports	Wages
A0111 - Nursery Production	-0.8	-1.2	-1.9	-3.1	0	1.2	-2.1
A0122 - Under Cover Vegetable Growing	5.3	3.4	2.8	5.9	N/C	N/C	7.0
A0123 - Outdoor Vegetable Growing	3.5	1.5	1.0	1.4	2.0	5.3	5.0
A0130 - Apple, Pear and Stone Fruit Growing	3.4	-0.6	-0.5	1.0	5.4	6.0	3.1
A0131 - Grape Growing	3.6	-10.1	-9.9	-3.1	13.3	0.7	4.5
A0139 - Citrus, Banana and Other Fruit Growing	3.2	0.6	-0.2	2.2	4.8	5.9	3.2
A0141 - Sheep Farming	5.0	-0.6	-0.7	-1.4	-1.0	-50	0.5
A0144 - Sheep-Beef Cattle Farming	10.6	2.8	1.0	1.7	N/C	N/C	6.7
A0145 - Grain-Sheep or Grain-Beef Cattle Farming	12.5	-2.2	-2.1	-2.6	N/C	N/C	2.8
A0149 - Grain Growing	0.7	1.6	-0.1	-0.2	-1.4	4.4	-15.5
A0160 - Dairy Cattle Farming	-4.3	-0.6	-1.5	-5.9	N/C	N/C	-7.3
A0200 - Aquaculture	1.6	-5.6	-5.7	-3.3	1.8	-1.5	2.2
A0300* - Forestry and Logging	1.1	0.9	0.2	-0.2	8.4	11.6	-2.5
A0529 - Shearing, Cropping and Agricultural Support Services	-0.1	-0.4	-0.4	-1.2	N/C	N/C	-1.3

# B-Mining

% Annual Change 2016-17

Industry	Revenue	Establishments	Enterprises	Employment	Exports	Imports	Wages
B0602 - Brown Coal Mining	-4.6	0	0	-9.5	N/C	N/C	-8.6
B0700 - Oil and Gas Extraction	16.8	0.8	1.9	4.0	25.2	1.2	4.4
B0804 - Gold Ore Mining	3.1	3.0	3.1	2.1	3.4	50.0	2.8
B0805 - Mineral Sand Mining	5.7	3.6	3.8	3.2	11.6	16.1	3.9
B1090 - Mining Support Services	3.1	0	-0.3	7.7	N/C	N/C	5.0

# C-Manufacturing

% Annual Change 2016-17

Industry	Revenue	Establishments	Enterprises	Employment	Exports	Imports	Wages
C1111 - Meat Processing	-0.1	-0.2	-1.1	0.3	2.8	4.1	0.9
C1112 - Poultry Processing	-0.1	-0.2	-1.1	0.3	2.8	4.1	0.9
C1131 - Milk and Cream Processing	4.6	-0.6	1.5	1.3	5.3	3.7	3.4
C1133a - Cheese Mfg.	-1.5	-0.6	0.7	-0.7	-10.3	0.9	0.7
C1133c - Butter and Dairy Product Mfg	1.4	0.5	-0.8	-0.8	-4.5	5.8	0.6
C1140 - Fruit and Vegetable Processing	-1.1	-1.8	-0.6	-1.1	2.4	0.8	-1.3
C1214 - Wine Production	7.1	-0.1	-2.2	2.1	11.8	0.7	2.9
C1310 - Synthetic and Natural Textile Mfg	-4.8	-3.1	-2.2	-4.9	-1.6	-0.7	-3.2
C1919b - Fibreglass Product Manufacturing* [Category Change]	-2.4	-0.9	-0.7	-1.1	-0.3	1.5	-0.8
C2132 - Aluminium Smelting	2.1	-4.4	-1.9	-5.0	5.4	-25.2	-5.5
C2221 - Structural Steel Fabricating	-11.0	-4.4	-4.4	-6.3	-2.6	-4.5	-8.7
C2229 - Structural Metal Product Mfg	-2.1	-1.1	-1.2	-2.0	3.9	-5.5	-1.4
C2239 - Metal Drum, Can and Bin Mfg	0.5	0.0	0.0	-0.1	0.7	0.9	-2.5
C2240 - Sheet Metal Product Mfg	-2.1	-0.8	-0.8	-1.2	-4.2	-0.7	-2.5
C2291 - Spring and Wire Product Mfg	-7.2	-3.6	-2.8	-5.1	2.1	-2.9	-3.7
C2299 - Fabricated Metal Product Mfg	-3.8	-2.5	-2.1	-3.6	1.7	-2.7	-2.9
<b>C2311 - Motor Vehicle Mfg.* HUGE changes in 16-17</b>	-3.3	-3.2	-2.7	-1.3	-6.3	1.3	-2.0
<b>C2319 - Motor Vehicle Parts and Accessories Mfg</b>	-34.6	-16.4	-16.4	-27.2	-6.3	-19.3	-30.2
C2392 - Boatbuilding and Repair Services	-2.4	-4.9	-5.2	-5.8	-25.8	-18.8	-2.9
C2394 - Aircraft Mfg. and Repair Services	1.7	2.8	1.0	2.6	8.4	4.5	3.9
C2412 - Medical and Surgical Equipment Mfg.	3.4	1.0	2.9	1.8	4.7	5.2	1.9
C2461 - Agricultural Machinery Mfg.	-2.7	-1.3	-1.4	-2.5	-2.5	7.0	-2.1



# D-Electricity, Gas, Water and Waste Services

% Annual Change 2016-17

Industry	Revenue	Establishments	Enterprises	Employment	Exports	Imports	Wages
D2611 - Fossil Fuel Electricity Generation	-2.2	0	-2.8	-4.0	N/C	N/C	-3.8
D2619 - Wind and Other Electricity Generation	9.7	6.7	6.7	10.0	N/C	N/C	10.7
D2620 - Electricity Transmission	-0.5	0	0	-2.9	N/C	N/C	-2.0
D2811 - Water Supply	3.0	-1.2	-1.3	0.4	N/C	N/C	0.8

# E-Construction

## % Annual Change 2016-17

Industry	Revenue	Establishments	Enterprises	Employment	Exports	Imports	Wages
E3011 - House Construction	-6.2	-2.2	-2.2	-2.9	N/A	N/A	-2.4
E3019 - Multi-Unit Apartment and Townhouse Construction	-17.4	-12.8	-12.8	-9.2	N/C	N/C	-14.3
E3021 - Commercial and Industrial Building Construction	0.8	0.0	0.0	0.5	N/A	N/A	-0.1
E3101 - Road and Bridge Construction	21.8	5.1	5.2	13.2	N/C	N/C	22.0
E3109 - Heavy Industry and Other Non-Building Construction	-5.6	-1.0	-1.0	-5.3	N/C	N/C	-7.5
E3211 - Land Development and Subdivision	-1.1	-1.9	-1.9	-0.5	N/C	N/C	-1.2
E3232 - Electrical Services	-3.7	-1.0	-1.0	-2.4	N/C	N/C	-2.4
E3233 - Air Conditioning and Heating Services	-1.6	-0.6	-0.5	-0.8	N/C	N/C	-0.7
E3242 - Carpentry Services	-6.9	-1.2	-1.2	-5.0	N/C	N/C	-5.5
E3291 - Landscaping Services	-4.0	-2.4	-2.4	-3.4	N/C	N/C	-3.3

# F-Wholesale Trade

% Annual Change 2016-17

Industry	Revenue	Establishments	Enterprises	Employment	Exports	Imports	Wages
F3601 - General Line Grocery Whl.	2.3	0.4	0.4	-2.0	N/C	N/C	0.3
F3605 - Fruit and Vegetable Whl.	3.0	2.6	1.9	3.9	N/C	N/C	3.1



# G-Retail Trade

% Annual Change 2016-17

Industry	Revenue	Establishments	Enterprises	Employment	Exports	Imports	Wages
G3911 - Motor Vehicle Dealers	1.1	0.3	0.2	1.7	N/C	N/C	1.9
G4111 - Supermarkets and Grocery Stores	2.9	3.2	2.2	3.9	N/A	N/A	8.4
G4200 - Consumer Goods Retail	-0.2	1.4	0.1	0.6	N/C	N/C	0.0
G4222 - Computer and Software Retailing	2.3	-3.3	-3.8	-2.2	N/C	N/C	1.6
G4251 - Clothing Retailing	2.7	7.1	6.2	6.4	N/C	N/C	7.3
G4260 - Department Stores	-2.2	0.6	-3.5	-1.0	N/C	N/C	-1.5

# H - Accommodation and Food Services

% Annual Change 2016-17

Industry	Revenue	Establishments	Enterprises	Employment	Exports	Imports	Wages
H4401 - Hotels and Resorts,	1.4	0.3	0.3	-0.5	N/C	N/C	1.0
H4402 - Motels	0.7	0.3	0.4	0.6	N/C	N/C	0.4
H4403 - Caravan Parks and Camping Grounds	1.8	-0.8	-0.8	0.6	N/C	N/C	0.3
H4511a - Restaurants	0.7	2.7	2.7	3.1	N/C	N/C	3.4
H4511b - Cafes and Coffee Shops	6.9	6.2	6.3	1.8	N/A	N/A	4.1
H4520 - Pubs, Bars and Nightclubs	1.0	1.0	-1.4	-0.4	N/C	N/C	1.9

# I-Transport, Postal and Warehousing

% Annual Change 2016-17

Industry	Revenue	Establishments	Enterprises	Employment	Exports	Imports	Wages
I4610 - Road Freight Transport	2.4	-1.9	-1.0	2.2	N/A	N/A	2.6
I4902 - Domestic Airlines	1.2	-0.6	-1.0	0.9	N/C	N/C	1.2
I5211 - Stevedoring Services	3.2	0.6	2.3	0.7	N/C	N/C	5.1
I5220 - Airport Operations	1.7	0.9	1.0	-1.2	N/C	N/C	1.9
I5292a - Road Freight Forwarding	-1.9	0.8	0.7	-2.7	N/C	N/C	-2.0
I5309 - General Warehousing and Cold Storage	3.0	-3.6	-3.9	0.3	N/A	N/A	1.6

# J-Information Media and Telecommunications

% Annual Change 2016-17

Industry	Revenue	Establishments	Enterprises	Employment	Exports	Imports	Wages
J5420 - Software Publishing	7.8	3.2	2.1	1.3	N/C	N/C	1.0
J5700 - Internet Publishing and Broadcasting	6.4	7.1	6.4	5.8	N/C	N/C	7.4
J5800 - Telecommunications Services	-0.4	7.6	8.9	2.8	N/C	N/C	3.8



# K-Financial and Insurance Services

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Not required at this time

# L-Rental, Hiring and Real Estate Services

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Not required at this time

# M-Professional, Scientific and Technical Services

% Annual Change 2016-17

Industry	Revenue	Establishments	Enterprises	Employment	Exports	Imports	Wages
M6900 - Professional Services	-0.2	0.7	0.9	0.9	N/C	N/C	2.2
M6910 - Scientific Research Services	2.2	0.8	0.8	0.7	N/A	N/A	1.3
M6924 - Specialised Design Services	2.7	1.2	1.3	3.8	N/C	N/C	4.5

# N-Administrative and Support Services

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Not required at this time

# O-Public Administration and Safety

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Not required at this time



# P-Education and Training

% Annual Change 2016-17

Industry	Revenue	Establishments	Enterprises	Employment	Exports	Imports	Wages
P8025 - Private Schools	4.3	0.1	0.1	2.3	N/C	N/C	5.3
P8026 - Government Schools	4.1	0.8	0.0	1.9	N/A	N/A	4.4
P8101 - Technical and Vocational Education and Training	1.7	0.2	1.2	-0.7	N/A	N/A	0.9
P8102 - University and Other Higher Education	3.6	0	0	2.6	N/A	N/A	4.1

# Q-Health Care and Social Assistance

% Annual Change 2016-17

Industry	Revenue	Establishments	Enterprises	Employment	Exports	Imports	Wages
Q8400 - Health Services	2.8	2.6	2.2	2.2	N/A	N/A	3.0
Q8401 - General Hospitals	3.5	0.4	-2.2	2.0	N/A	N/A	3.2
Q8539 - Other Health Services	1.6	2.1	1.2	2.2	N/A	N/A	1.3
Q8601 - Aged Care Residential Services	4.8	3.3	-0.6	0.9	N/A	N/A	3.0
Q8700 - Community Services	8.3	2.5	2.6	2.8	N/A	N/A	4.6
Q8710 - Child Care Services	12.0	3.6	3.4	4.0	N/A	N/A	4.9
Q8790 - Personal Welfare Services	9.3	1.3	2.3	2.2	N/A	N/A	7.0

# R-Arts and Recreation Services

% Annual Change 2016-17

Industry	Revenue	Establishments	Enterprises	Employment	Exports	Imports	Wages
R9111 - Gyms and Fitness Centres	5.4	1.9	1.1	-0.3	N/C	N/C	5.1
R9112 - Sports and Physical Recreation Clubs	2.7	2.4	2.1	1.0	N/C	N/C	2.4
R9113 - Sports and Recreation Facilities Operation	2.5	0.1	0.9	-1.6	N/C	N/C	2.0
R9114 - Sports Administrative Services	6.6	1.7	1.8	6.2	N/C	N/C	7.1

# S-Other Services

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Not required at this time