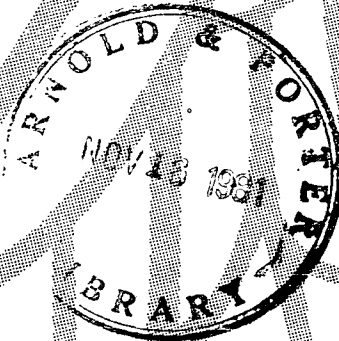


**COLOR TELEVISION RECEIVERS:
U.S. PRODUCTION, SHIPMENTS, INVENTORIES,
EXPORTS, EMPLOYMENT, MAN-HOURS,
AND PRICES, THIRD
CALENDAR QUARTER 1981**

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



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Highlights

U.S. production of color television receivers in July-September 1981 amounted to 2.5 million sets, which was about the same as production in the corresponding quarter of 1980 but 247,000 less than in April-June 1981.

U.S. producers' shipments of all screen sizes in July-September 1981 totaled 2.5 million sets, which was about the same as shipments in the corresponding period of 1980. Shipments of sets 20 inches and over decreased by 10.0 percent, shipments in the 18- and 19-inch screen-size category increased by 7.6 percent, and those in the 17-inch-and-under category decreased by 4.9 percent.

Total inventories of U.S. producers on September 30, 1981, were 32.0 percent higher than the September 30, 1980, level. Inventories of all screen-size categories ranged from a 3.6-percent decrease in the category of 20 inches and over to an increase of 95.7 percent in the category of 17 inches and under.

Exports of U.S.-made color sets amounted to 134,000 sets in July-September 1981, compared with 121,000 sets in April-June 1981.

The number of all persons and of production and related workers employed by U.S. producers declined by 16.5 and 18.2 percent, respectively, in July-September 1981, compared with figures in the corresponding period of 1980.

Average unit net selling prices of U.S. producers rose for all screen sizes. Compared with prices in July-September 1980 average quarterly prices in July-September 1981 in the 13-inch category increased by \$9.54 (4.0 percent); those in the category of 14 through 17 inches, by \$25.53 (8.5 percent); those in the category of 18 and 19 inches, by \$5.95 (1.9 percent); and those in the 20 inches and over category, by \$19.66 (3.9 percent).

Capsulized Trend Analysis

U.S. production

U.S. production of color television receivers in July-September 1981 amounted to 2.5 million sets, which was about the same as production in July-September 1980 and 19.8 percent higher than in July-September 1979. Compared with production in July-September 1980, production in July-September 1981 was lower in screen-size categories of 17 inches and under and of 20 inches and over, but higher in the category of 18 and 19 inches. The share of production contributed by the screen-size category of 17 inches and under decreased from 22.5 percent to 19.4 percent from the second quarter of 1981 to the third quarter of 1981. The production share of the other two screen-size categories increased slightly during this period.

U.S. producers' shipments

U.S. producers' shipments of color television receivers in July-September 1981, 2.5 million sets, were 5.1 percent greater in quantity than those in the second quarter. They were equal to those in the corresponding period of 1980 and 9.9 percent higher than shipments in the third quarter of 1979. Compared with shipments in the corresponding period of 1980, current shipments increased in the screen-size category of 18 and 19 inches but decreased in the other two categories. Total shipments in July-September 1980 increased 9.8 percent over shipments in the corresponding period of 1979.

U.S. producers' inventories

U.S. producers' inventories of color television receivers at the end of September 1981 were 949,305 units, 32.0 percent higher than the number at the end of September 1980. Quarterly average inventories for July-September 1981

were 23.0 percent higher than inventories in the corresponding period of 1980, but 33.2 percent higher than those in July-September 1979. Stocks of sets 17 inches and under increased by an average of 87.5 percent in the third quarter of 1981 compared with the level in the corresponding period of 1980. In the category of 18 and 19 inches, average inventories increased by 27.1 percent but screen sizes of 20 inches and over decreased by 9.9 percent. Compared with the inventories of April-June 1981, current average quarterly inventories for screen-size categories 17 inches and under were 7.6 percent lower; those for 18 and 19 inches, 12.8 percent lower; and those for 20 inches and over, 21.8 percent lower.

U.S. producers' exports

U.S. producers' exports of color television receivers amounted to 134,217 sets during July-September 1981, compared with 120,925 sets exported during April-June 1981. The category of 18 and 19 inches accounted for 76,210 sets, or 56.8 percent of total exports.

U.S. employment

Employment in U.S. producers' establishments maintained the general decline in both production and related workers and in managerial employees. The average number of production and related workers employed during July-September 1981 was 17,830 persons, down 18.2 percent from 21,786 persons in the corresponding period of 1980. The average number of all workers was 20,843, down from 24,947 in July-September 1980. Also, the number of man-hours worked by production and related workers was 8.7 million in July-September 1981, down from 10.8 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 all major screen-size categories during July-September 1981 compared with those in the corresponding quarter of 1980. The average prices of the 13-inch size increased by \$9.54 (4.0 percent); those of the 14- through 17-inch category by \$25.53 (8.5 percent); those of the 18- and 19-inch sizes by \$5.95 (1.9 percent); and those of the sets 20 inches and over increased by \$19.66 (3.9 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 July-September 1981 compared with prices in the second quarter of the year. Prices in the 13-inch category increased by \$6.50; those for 14- through 17-inch sizes increased by \$21.15; those for the 18- and 19-inch sizes, by \$4.33; and those for the 20-inches-and-over sizes, by \$13.64.

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

(In units)

Period	Screen-size category			
	17 inches and under	18 inches and 19 inches	20 inches and over	Total
1979:				
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
July-----	134,001	385,711	169,980	689,692
August-----	171,326	472,322	208,147	851,795
September-----	183,701	526,003	271,865	981,569
Subtotal-----	489,028	1,384,036	649,992	2,523,056

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, July 1979-September 1981

Period	Screen-size category			
	17 inches and under	18 inches and 19 inches	20 inches and over	Total
Quantity (units)				
1979:				
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
July-----	121,074	382,902	162,165	666,141
August-----	150,088	455,259	213,961	819,308
September-----	195,338	543,204	268,977	1,007,519
Subtotal-----	466,500	1,381,365	645,103	2,492,968

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, July 1979-September 1981--Continued

Period	Screen-size category			
	17 inches and under	18 inches and 19 inches	20 inches and over	Total
Value (1,000 dollars)				
1979:				
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
July-----	31,083	123,764	86,933	241,780
August-----	38,005	146,910	112,494	297,409
September-----	50,367	176,104	137,888	364,359
Subtotal-----	119,455	446,778	337,315	903,548

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, July 1979-September 1981

(In units)

Period	Screen-size category			Total
	17 inches and under	18 inches and 19 inches	20 inches and over	
1979:				
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
July-----	227,330	544,233	272,720	1,044,283
August-----	237,277	530,597	255,441	1,023,315
September-----	212,617	491,015	245,673	949,305
Average-----	225,741	521,948	257,945	1,005,634

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-September 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
July-----	10,262	18,211	4,739	33,212
August-----	9,778	20,242	5,977	35,997
September-----	14,195	37,757	13,056	65,008
Subtotal-----	34,235	76,210	23,772	134,217
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
July-----	2,367	6,678	2,548	11,593
August-----	2,665	6,728	3,067	12,460
September-----	3,924	13,158	6,328	23,410
Subtotal-----	8,956	26,564	11,943	47,463

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, July 1979-September 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:				
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	23,173	20,010	12,167	10,461
July	20,460	17,475	3,179	2,671
August	21,068	18,050	3,366	2,869
September	21,002	17,965	3,576	3,149
Average or subtotal	20,843	17,830	10,121	8,689

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, July 1979-September 1981

Period	Screen-size category			
	13 inches	14 inches- 17 inches 1/	18 inches and: 19 inches	20 inches and over
1979:				
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
July-----	247.76	353.75	323.23	536.08
August-----	241.85	326.29	322.70	525.77
September-----	249.45	314.94	324.20	512.64
Average-----	246.51	326.70	323.43	522.89

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

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

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

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