

**COLOR TELEVISION RECEIVERS:
IMPORTS, EMPLOYMENT, MAN-HOURS,
U.S. PRODUCTION, SHIPMENTS, INVENTORIES,
AND PRICES, FIRST
CALENDAR QUARTER 1979**

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



USITC PUBLICATION 971

MAY 1979

UNITED STATES INTERNATIONAL TRADE COMMISSION

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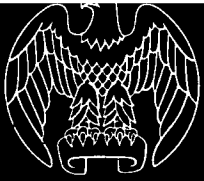
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NEWS

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FOR RELEASE
May 15, 1979

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USITC 79-045

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

The United States International Trade Commission has completed its eighth 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 first quarter of 1979. The Commission has previously reported data obtained for the fourth quarter of 1976 and for the years 1977 and 1978.

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 971. This publication provides data for 1977 and 1978, as well as the first quarter of 1979 and shows 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 Street NW., Washington, D.C. 20436.

Highlight

U.S. production of color television receivers in the first quarter of 1979 was 2.1 million sets, 12.7 percent higher than in the corresponding quarter of 1978. A continuation of the shift to sets of 19 inches and under persisted. U.S. producers' imports of complete color sets decreased to 51.8 percent below imports in the first quarter of 1978, standing at only 54,661 sets. Inventories of U.S. producers were 21.0 percent higher at the end of March 1979 than they were at the end of March 1978 because inventories almost doubled in the 18- and 19-inch category; other categories decreased. An increase of 3.3 percent in U.S. producers' shipments to 1.9 million units in the first quarter of 1979 compared with first-quarter shipments in 1978 suggests that increases in 1979 will not be comparable to 1978. Employment continued the slow downward trend despite increased production and decreased imports by U.S. producers. Prices, however, showed a general increase. In the 18- and 19-inch category, prices were up an average of \$10.36 for the quarter; for the category of 20 inches and over, prices averaged \$24.04 higher. Average prices for the 16- and 17-inch category were \$8.13 lower for the quarter, and for the 13-inch set, marginally higher by \$0.45.

Capsulized Trend Analysis

U.S. production

U.S. production of color television receivers in the first quarter of 1979 was 2.1 million sets, 12.7 percent higher than in the first quarter of 1978 and 33.5 percent higher than in the first quarter of 1977. Compared with production in the first quarter of 1978, it was higher in the categories of 17 inches and under and 18 inches and 19 inches but lower for sets 20 inches and over. A shift of production to sets of 18 inches and 19 inches continues, with this size accounting for 50.4 percent of production in the quarter. The category of 20 inches and over represented a diminishing share of 31.0 percent.

U.S. producers' imports

U.S. producers' imports of color sets in the first quarter were 54,661 units, 51.8 percent lower than in the first quarter of 1978. The decline occurred for sets 17 inches and under and 18 inches and over. Nonetheless, imports in the first quarter of 1979 were 29.1 percent higher than in the first quarter of 1977. The apparent reversal in trend, if sustained, will probably be due to the increased production by subsidiaries of Japanese firms in the United States.

U.S. producers' inventories

U.S. producers' inventories of color television receivers at the end of March 1979 were 844,800 units, 21.0 percent higher than in March 1978. Average inventories for the first quarter were 12.2 percent higher than in the first quarter of 1978 and 28.8 percent higher than in the first quarter of 1977. The major change in the inventory status occurred in the 18- and 19-inch category, in which inventories almost doubled from the first quarter

of 1978 and more than doubled from the corresponding quarter of 1977. For sets 17 inches and under, the inventory was lower than in the corresponding quarters in 1977 and 1978, and for sets 20 inches and over, the inventory was lower than in 1978 but higher than in 1977.

U.S. producers' shipments

U.S. producers' shipments of color television receivers continued to increase. In the first quarter, shipments were 1.9 million sets, 3.3 percent higher than in the first quarter of 1978 and 23.8 percent higher than in the first quarter of 1977. Shipments rose in all categories except 20 inches and over, in which they dropped 11.6 percent. Shipments are outpacing inventories in the category 17 inches and under; inventories have dropped whereas shipments have continued to increase rapidly. Total shipments in the first quarter indicate a slower rate of increase than in the previous year.

U.S. employment

Employment in U.S. producers' establishments continued a slow general decline in both production and related workers and managerial employees. The average number of production and related workers employed during the first quarter was 21,823 persons, down from 23,444 persons in 1978, and the total number of workers was 25,786, down from 26,628 in the first quarter of 1978. The decline in employment occurred in a quarter of increased production and decreasing imports by U.S. producers. It indicates increased productivity and increased purchases of foreign-made subassemblies.

Prices

Average unit net selling prices were generally higher during the first quarter than during previous corresponding quarters. The average prices of the categories of 18 inches and 19 inches and 20 inches and over were higher than in the first quarter of 1978 by \$10.36 and \$24.04, respectively. The 13-inch set size was higher by \$0.45, but the 16- and 17-inch category was lower by \$8.13. Prices had been drifting downward through the fourth quarter of 1978 despite attempts by U.S. producers to increase prices and regain a respectable profit. With the intense competition among domestic producers, it remains to be seen whether the price increases can be maintained.

Table 1.--Complete color television receivers: U.S. production, by screen size categories, by months, January 1977-March 1979

(In units)

Period	Screen size category			Total
	17 inches and under	18 inches and 19 inches	20 inches and over	
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
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	2,147,399

^{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. imports by producing establishments, by screen size categories, by months, January 1977-March 1979

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
1979:			
January-----	13,995	14,042	28,037
February-----	3,208	13,276	16,484
March-----	1,661	8,479	10,140
Subtotal ^{2/} -----	18,864	35,797	54,661

See footnotes at end of table.

Table 2.--Complete color television receivers: U.S. imports by producing establishments, by screen size categories, by months, January 1977-March 1979--Continued

Period	Screen size category			Total
	17 inches and under	18 inches and over ^{1/}		
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
1979:				
January-----	2,569	3,158		5,727
February-----	657	2,800		3,457
March-----	495	1,786		2,281
Subtotal ^{2/} -----	3,721	7,744		11,465

^{1/} U.S. imports of complete color television receivers with a screen size of 20 inches or more 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 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-March 1979

(In units)

Period	Screen size category			Total
	17 inches : and under :	18 inches : and 19 inches :	20 inches : and over :	
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
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 ² /-----	111,230	424,474	279,148	814,852

¹/ Reported on the last day of the month.

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.

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-March 1979

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
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

See footnotes 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- March 1979--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
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-----	89,728	289,432	283,431	662,591

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

^{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 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-March 1979

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
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 <u>2/</u> -----	25,786	21,823	13,389	11,231

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.

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-March 1979

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-----	223.16	282.04	279.73	425.77
May-----	216.93	320.21	287.87	432.87
June-----	218.57	279.26	290.42	437.51
Average-----	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
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 ^{1/} -----	218.28	283.92	300.43	470.55

^{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.

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