

Embargoed until 10:45am – 08 December 2009

Economic Survey of Manufacturing: September 2009 quarter

Highlights

Sales (seasonally adjusted) for the September 2009 quarter compared with the June 2009 quarter:

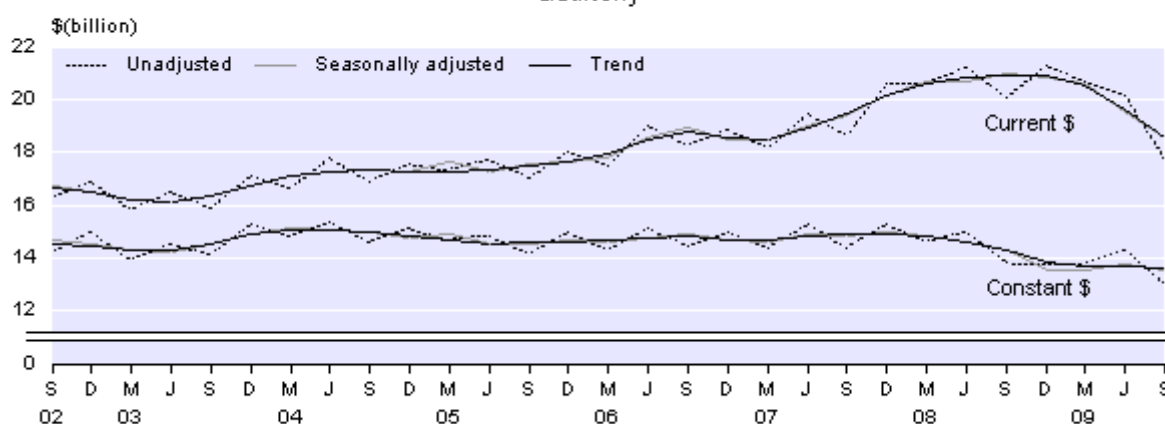
Volumes

- Manufacturing fell 1.4 percent.
- Excluding meat and dairy product manufacturing, sales rose 1.0 percent.
- Meat and dairy manufacturing fell 7.1 percent.

Values

- Manufacturing fell 5.1 percent.
- Excluding meat and dairy product manufacturing, sales fell 0.8 percent.
- Meat and dairy manufacturing fell 15.8 percent.

Total Manufacturing Sales
Current and constant dollars ⁽¹⁾
Quarterly



(1) Constant dollar series (volumes) are at December 1997 quarter prices.

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Commentary

All references to sales movements are seasonally adjusted unless otherwise stated.

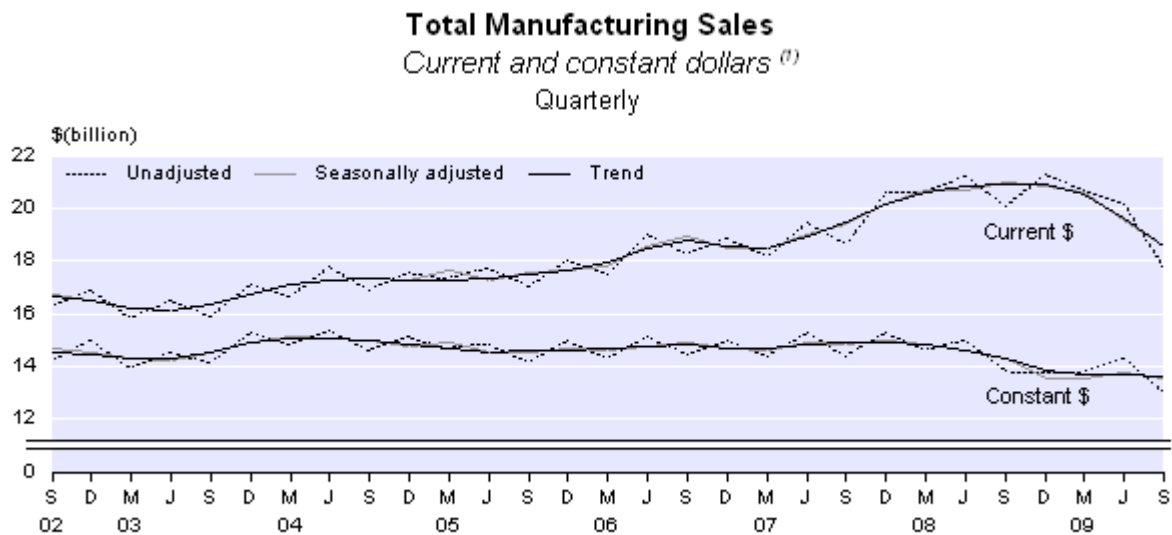
All manufacturing industries

The volume of manufacturing sales fell 1.4 percent in the September 2009 quarter, following a rise of 1.5 percent in the June 2009 quarter. The meat and dairy product manufacturing industry was the key contributor to both these movements. The sales volume for this industry fell 7.1 percent after a rise of 7.5 percent in the June 2009 quarter.

For industries other than meat and dairy, there were mixed results for sales volume movements in the September 2009 quarter. Six industries show increases, six show decreases, and two show little or no movement. The main changes were:

- wood product manufacturing, up 9.1 percent
- basic metal manufacturing, up 21.5 percent
- machinery and equipment manufacturing, down 4.4 percent.

Volumes are calculated by removing the effect of price changes from values.



(1) Constant dollar series (volumes) are at December 1997 quarter prices.

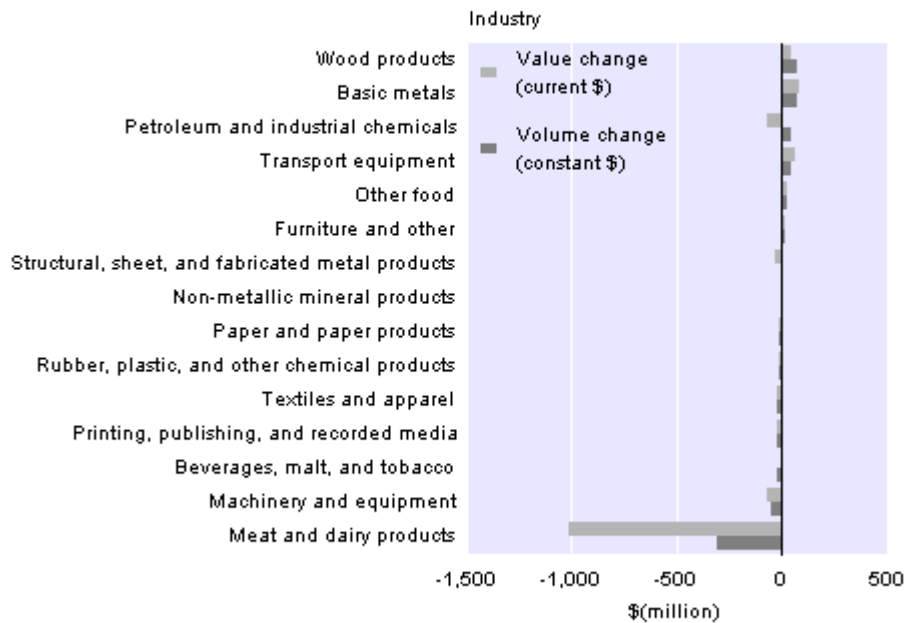
The value of sales fell by 5.1 percent (\$1,004 million) in the September 2009 quarter. This is the fourth consecutive quarterly fall and has lowered sales to the level last seen in early 2007. Driving the latest fall was a drop of 15.8 percent (\$1,011 million) in sales values for the meat and dairy product manufacturing industry, resulting mainly from lower prices for dairy products. The other main changes in the September 2009 quarter were:

- basic metal manufacturing, up 14.6 percent (\$85 million)
- petroleum and industrial chemical manufacturing, down 8.8 percent (\$68 million)
- machinery and equipment manufacturing, down 4.0 percent (\$66 million)
- transport equipment manufacturing, up 11.7 percent (\$65 million).

Changes in Seasonally Adjusted Manufacturing Sales

Current and constant dollars ⁽¹⁾

June 2009 quarter to September 2009 quarter



(1) Constant dollar series (volumes) are at December 1997 quarter prices.

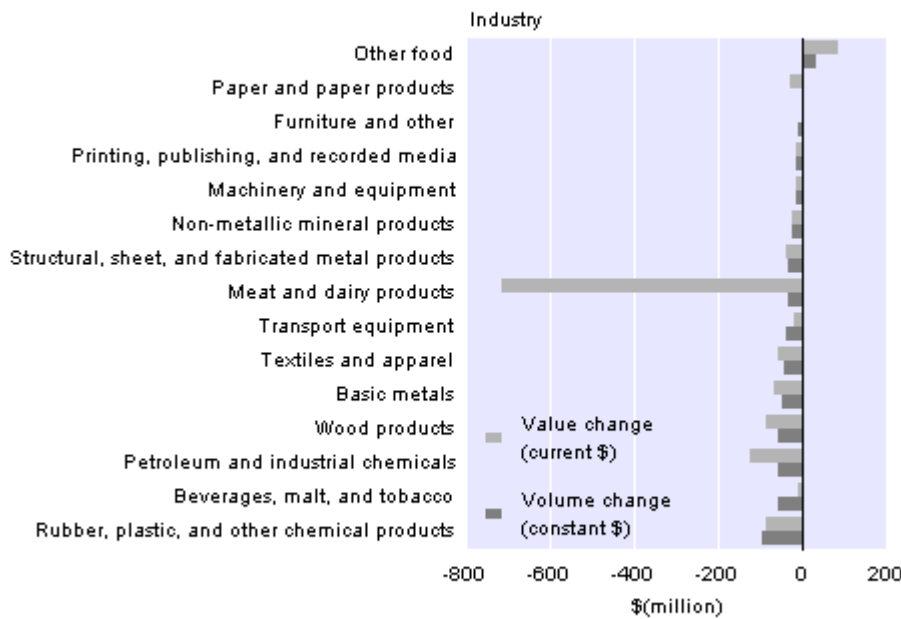
The trend for the sales volume is down for the seventh consecutive quarter, while the trend for the sales value is down for the latest three quarters.

Stocks of finished goods, which are not seasonally adjusted, are down 8.7 percent in volume for the September 2009 quarter compared with the September 2008 quarter. Stock values, at \$6.8 billion, are down 14.9 percent (\$1.2 billion) from the September 2008 quarter, with meat and dairy product manufacturing the main cause of the fall.

Changes in Manufacturing Stocks ⁽¹⁾

In current and constant dollars ⁽²⁾

September 2008 quarter to September 2009 quarter



(1) Closing stocks of finished goods.

(2) Constant dollar series (volumes) are at December 1997 quarter prices.

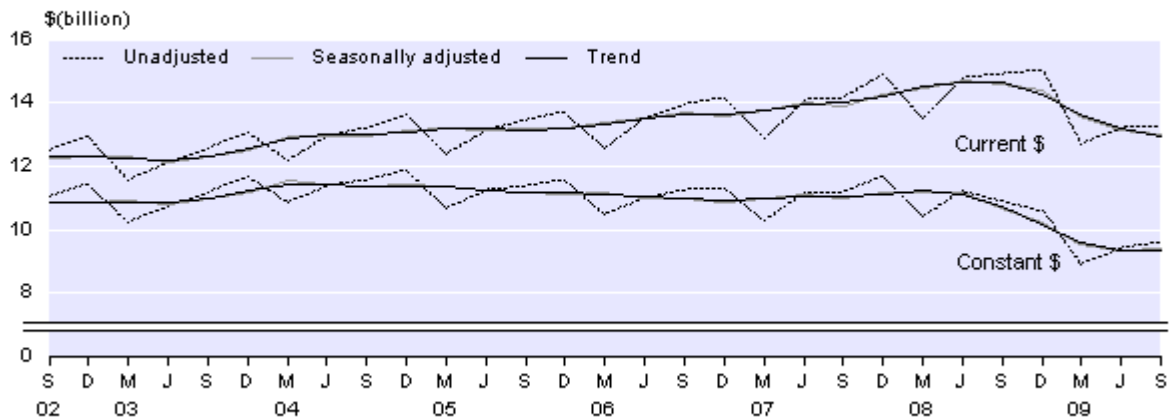
All manufacturing excluding meat and dairy product manufacturing

The volume of sales, excluding meat and dairy product manufacturing, rose 1.0 percent in the September 2009 quarter. This rise follows falls in the previous six quarters that reduced the volume to the lowest level seen in 15 years. As detailed in the previous section, industry activity was mixed, with six industries up, six down, and two showing little or no movement. Wood product and basic metal industries were the main contributors to the latest rise, while the machinery and equipment industry showed the largest fall.

Manufacturing Sales Excluding Meat and Dairy Product Manufacturing

Current and constant dollars ⁽¹⁾

Quarterly



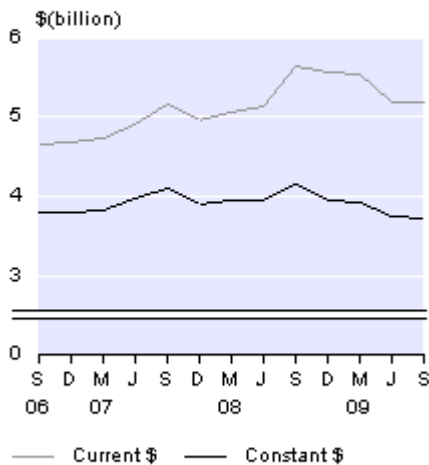
(1) Constant dollar series (volumes) are at December 1997 quarter prices.

The value of sales fell 0.8 percent (\$107 million) in the September 2009 quarter, the fifth consecutive quarterly fall. As detailed in the previous section, the largest falls in sales value were in the petroleum and industrial chemical, and machinery and equipment industries, while the basic metal, and transport equipment industries had the largest rises.

The trend for the sales volume is flat after five quarters of decline, while the trend for the sales value is down for the latest four quarters.

The volume of finished goods stocks, which is not seasonally adjusted, is down 10.5 percent for the September 2009 quarter compared with the September 2008 quarter. The value, at \$5.2 billion, is down 8.3 percent.

Manufacturing Stocks⁽¹⁾
Excluding Meat and Dairy
Current and constant dollars⁽²⁾
 Quarterly



(1) Closing stocks of finished goods.

(2) Constant dollar series (volumes) are at December 1997 quarter prices.

Meat and dairy product manufacturing

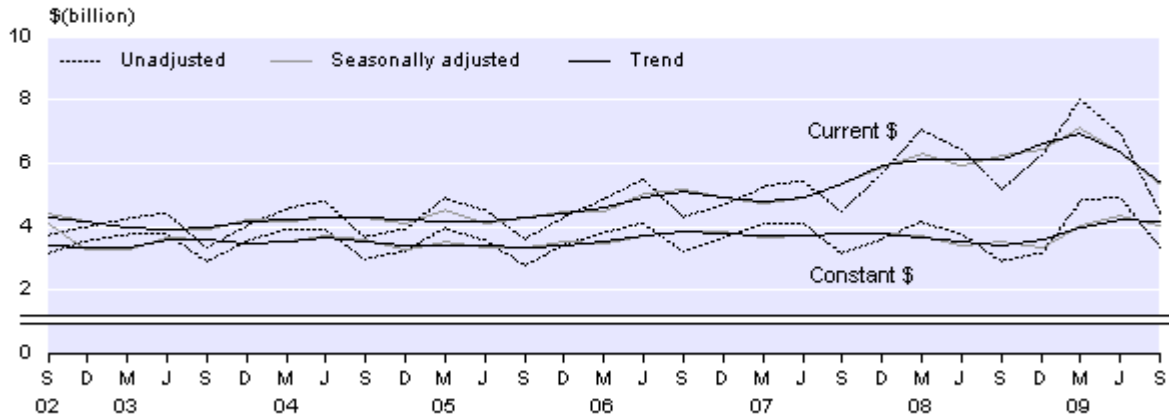
Most dairy industry values in this survey are compiled on a non-standard quarter. The data has a one-month lag which means, for example, that the September quarter includes values for the months of June, July, and August. Monthly data is now available, and when there is a substantial time series and a new seasonal pattern can be established, dairy industry data (combined with the meat industry) will be published based on a standard quarter (such as July–September).

The volume of sales for the meat and dairy product manufacturing industry fell 7.1 percent in the September 2009 quarter, following substantial rises totalling 28.4 percent in the previous two quarters. Milk powder, butter, and cheese export quantities rose 2.0 percent in the September 2009 quarter, while meat and edible offal export quantities fell 16.0 percent, as published in the Overseas Merchandise Trade release.

Meat and Dairy Product Manufacturing Sales

Current and constant dollars ⁽¹⁾

Quarterly



(1) Constant dollar series (volumes) are at December 1997 quarter prices.

The value of sales fell 15.8 percent in the September 2009 quarter, following a fall of 10.5 percent in the June 2009 quarter. Prices for dairy products, as measured by the producers price index, fell 10.9 percent in the September 2009 quarter, while prices for meat and meat products fell 0.3 percent.

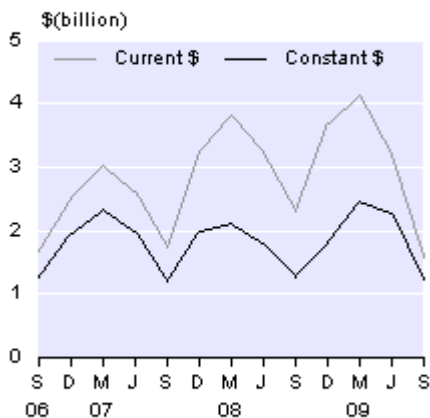
The trend for the sales volume provisionally indicates a decline in the latest quarter, after recent strong growth. The trend for the sales value, which includes the impact of price falls, shows substantial decline in the latest two quarters.

The volume of finished goods stocks, which is not seasonally adjusted, is down 2.6 percent for the September 2009 quarter compared with the September 2008 quarter. The value, at \$1.6 billion, is down 31.1 percent. This large drop is mostly attributable to the dairy industry, which, as mentioned above, is subject to a one-month lag in this survey.

Meat and Dairy Product Manufacturing Stocks ⁽¹⁾

Current and constant dollars ⁽²⁾

Quarterly



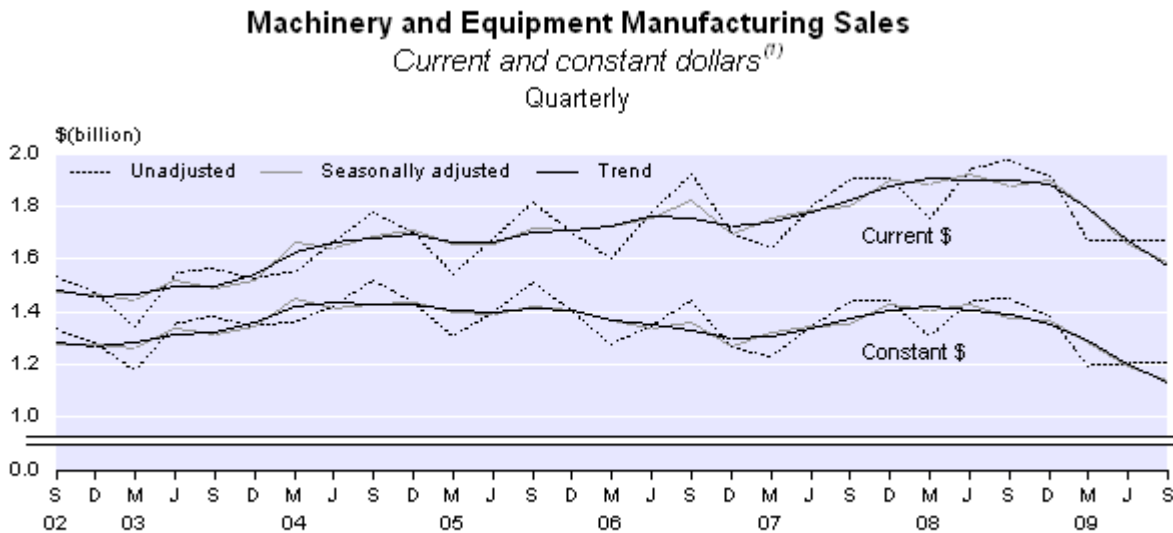
(1) Closing stocks of finished goods.

(2) Constant dollar series (volumes) are at December 1997 quarter prices.

Machinery and equipment manufacturing

This industry includes the manufacture of industrial electronic equipment and appliances, and photographic and scientific equipment.

The volume of sales for this industry fell 4.4 percent in the September 2009 quarter, following a fall of 7.1 percent in the June 2009 quarter. The series is at its lowest level in almost 11 years.



(1) Constant dollar series (volumes) are at December 1997 quarter prices.

The value of sales fell 4.0 percent in the September 2009 quarter, following a fall of 7.8 percent in the June 2009 quarter. Prices for machinery and equipment fell 1.5 percent and 0.4 percent in the June and September 2009 quarters, respectively, as measured by the producers price index.

The trend for the sales volume shows a decline for the latest six quarters, while the trend for the sales value shows a decline for the latest four quarters.

The volume of finished goods stocks, which is not seasonally adjusted, is down 2.9 percent for the September 2009 quarter compared with the September 2008 quarter. The value, at \$615 million, is down 2.1 percent.

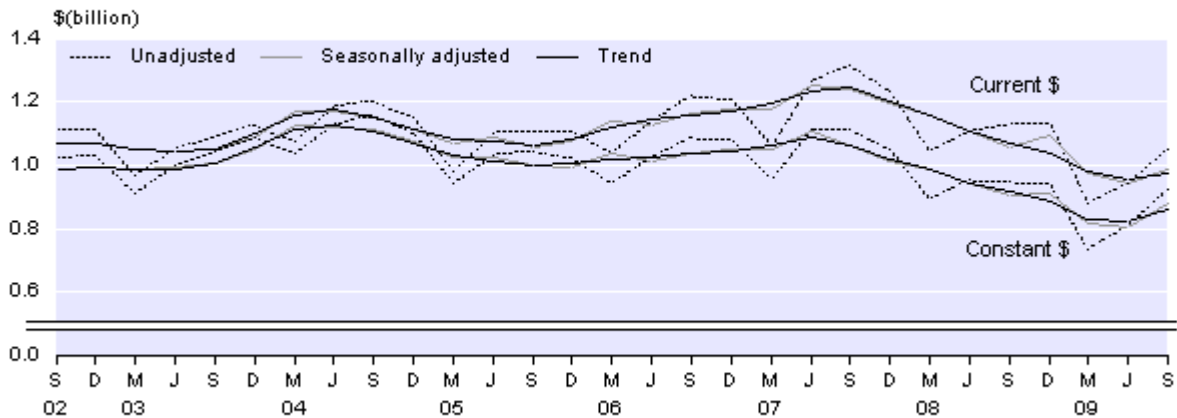
Wood product manufacturing

The wood product manufacturing industry consists of log sawmilling, wood chipping, timber re-sawing and dressing, and the manufacture of plywood and veneer, fabricated wood, and wooden structural components.

The volume of sales rose 9.1 percent in the September 2009 quarter, making the wood product manufacturing industry the largest positive contributor to the movement in total manufacturing volumes. In the June 2009 quarter, this industry had a fall of 1.7 percent.

Wood Product Manufacturing Sales

Current and constant dollars⁽¹⁾
Quarterly



(1) Constant dollar series (volumes) are at December 1997 quarter prices.

The value of sales rose 4.9 percent in the September 2009 quarter, following a fall of 3.7 percent in the June 2009 quarter. Prices for wood products declined 2.3 percent in the June 2009 quarter and 2.6 percent in the September 2009 quarter, as measured by the producers price index.

The trend series for the sales volume and the sales value provisionally indicate growth after about two years of decline.

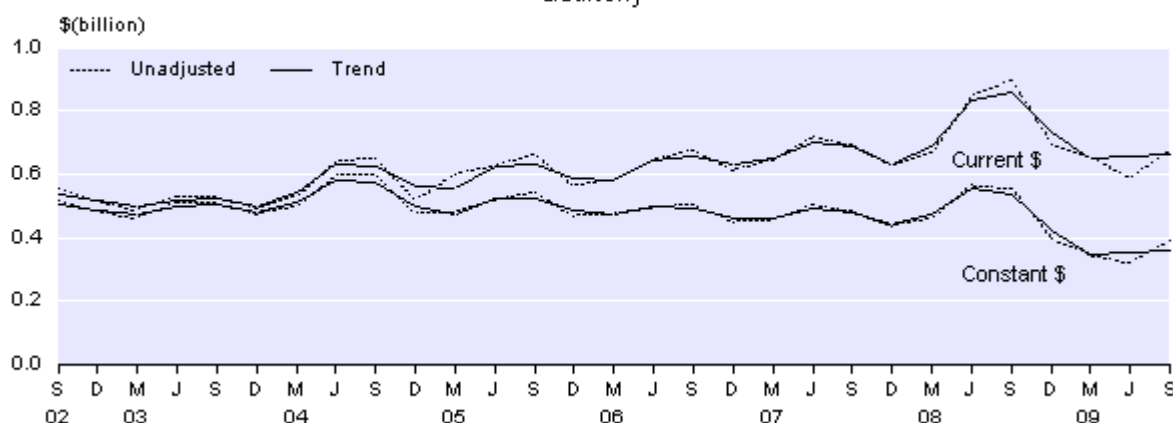
The volume of finished goods stocks, which is not seasonally adjusted, is down 12.4 percent for the September 2009 quarter compared with the September 2008 quarter. The value, at \$444 million, is down 15.9 percent.

Basic metal manufacturing

The basic metal manufacturing industry includes the manufacture of iron and steel, basic non-ferrous metals, and non-ferrous basic metal products. Sales for this industry do not have a stable seasonal pattern, so are not seasonally adjusted.

The (unadjusted) volume of sales rose 21.5 percent in the September 2009 quarter, following a fall of 7.1 percent in the June 2009 quarter. Despite the recent rise, the series remains at a historically low level.

Basic Metal Manufacturing Sales
Current and constant dollars ⁽¹⁾
 Quarterly



(1) Constant dollar series (volumes) are at December 1997 quarter prices.

The (unadjusted) value of sales rose 14.6 percent in the September 2009 quarter, providing the largest positive contribution to the change in total manufacturing sales. In the June 2009 quarter, this industry had a fall of 10.9 percent. Prices for basic metals, as measured by the producers price index, fell 4.0 percent and 5.7 percent in the June and September 2009 quarters, respectively, following six quarters of rises.

The trend series for both the sales volume and sales value show moderate increases in the latest two quarters following large falls in the previous two quarters.

The volume of finished goods stocks, which is not seasonally adjusted, is down 33.3 percent for the September 2009 quarter compared with the September 2008 quarter. The value, at \$166 million, is down 29.1 percent.

Revisions

Amended data received from respondents has resulted in revisions for the following industries:

- meat and dairy product manufacturing (March and June 2009 quarters)
- beverage, malt, and tobacco manufacturing (March and June 2009 quarters)
- petroleum and industrial chemical manufacturing (March 2009 quarter)
- transport equipment manufacturing (June 2009 quarter).

The main changes to sales, purchases, and stocks of finished goods are in the following table.

Industry	Variable	Series MANQ.	Period (quarter)	Published	Published
				15 Sep 2009	8 Dec 2009
				\$(million)	\$(million)
Meat and dairy	Stocks	SNMCZ1E	Jun 2009	3,206	3,190
Beverage, malt	Sales	SNMCZ2A	Mar 2009	927	917
Beverage, malt	Purchases	SNMCZ2B	Mar 2009	562	572
Beverage, malt	Stocks	SNMCZ2E	Jun 2009	948	985
All manufacturing	Sales	SNMCZZA	Mar 2009	20,670	20,660
All manufacturing	Purchases	SNMCZZB	Mar 2009	14,648	14,658
All manufacturing	Stocks	SNMCZZE	Jun 2009	8,363	8,382

Measurement errors

The Economic Survey of Manufacturing applies imputation methods for estimating values for small firms and non-response, and, like all statistical surveys, is subject to measurement errors, including sample errors and non-sample errors. These measurement errors affect the accuracy of the published statistics. For more information on measurement errors, please refer to the technical notes of this release.

Sample errors

The postal survey was designed to give statistics at the following levels of accuracy (at the 95 percent confidence interval limit):

- 5 percent for sales, salaries and wages, and value added at the total manufacturing level
- 10 percent for sales, salaries and wages, and value added at the published industry level, where value added is calculated as follows:

value added = sales – purchases + stock change

This means, for example, that there is a 95 percent chance that the true value of total manufacturing sales lies within 5 percent of the published estimate.

Sample errors are calculated each quarter for absolute values and for changes in value from the previous quarter.

The sample errors for the September 2009 quarter, at the 95 percent confidence interval limit, are:

Industry	Sample error for sales	Sample error for change in sales
	Percent	
Meat and dairy product manufacturing	0.0	0.0
Other food manufacturing	13.5	7.4
Beverage, malt, and tobacco manufacturing	0.0	0.0
Textile and apparel manufacturing	6.1	2.8
Wood product manufacturing	5.4	1.1
Paper and paper product manufacturing	0.0	0.0
Printing, publishing, and recorded media	7.0	7.2
Petroleum and industrial chemical manufacturing	0.0	0.0
Rubber, plastic, and other chemical product manufacturing	10.6	2.0
Non-metallic mineral product manufacturing	3.6	1.9
Basic metal manufacturing	0.0	0.0
Structural, sheet, and fabricated metal product manufacturing	4.6	1.6
Transport equipment manufacturing	4.9	2.4
Machinery and equipment manufacturing	4.0	2.0
Furniture and other manufacturing	8.1	1.1
Total manufacturing	2.0	0.9

Industries with zero sample error are full-coverage industries. In these industries, all large firms

are surveyed and all small- to medium-sized firms are modelled using administrative data from Inland Revenue.

Imputation

Small firms

Small- to medium-sized firms are generally not surveyed. Their variables are instead modelled from administrative data from Inland Revenue. Ratios calculated from the postal sample responses are applied to the administrative data to provide estimated values.

Non-response imputation

Although attempts are made to achieve a 100 percent response rate, in practice this does not occur. Values for non-responding businesses are estimated using a range of methods, including:

- regression imputation
- historic imputation
- mean imputation.

Regression imputation involves estimating the variable of interest from the unit's administrative data (GST sales), based on the relationship shown by similar businesses. Historic imputation involves multiplying their response in the previous period by a non-response factor. The non-response factor is the average movement over the quarter of similar businesses. Mean imputation involves estimating a value for a unit by using the average value for a set of similar businesses.

The table below shows percentages of sales imputed in the September 2009 quarter:

Industry	Non-response	Tax modelled
	Percentage of sales	
Meat and dairy product manufacturing	0.4	3.1
Other food manufacturing	11.2	4.6
Beverage, malt, and tobacco manufacturing	2.2	5.7
Textile and apparel manufacturing	14.9	17.1
Wood product manufacturing	13.2	8.8
Paper and paper product manufacturing	3.7	0.7
Printing, publishing, and recorded media	11.0	11.1
Petroleum and industrial chemical manufacturing	3.8	5.4
Rubber, plastic, and other chemical product manufacturing	10.2	8.5
Non-metallic mineral product manufacturing	6.8	7.4
Basic metal manufacturing	3.7	4.6
Structural, sheet, and fabricated metal product manufacturing	16.2	10.7
Transport equipment manufacturing	16.0	10.0
Machinery and equipment manufacturing	15.1	12.6
Furniture and other manufacturing	14.6	22.4
Total manufacturing	8.1	7.2

Response rate

The response rate applies to the postal sample and gives the proportion of sales obtained from survey responses (compared with being imputed). The Economic Survey of Manufacturing has a target response rate of 85 percent. The response rate achieved for the September 2009 quarter was 91 percent.

For technical information contact:
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Email: info@stats.govt.nz

Next release ...

Economic Survey of Manufacturing: December 2009 quarter will be released on 8 March 2010

Technical notes

Background to the survey

The Economic Survey of Manufacturing (QMS) is designed to provide short-term economic indicators for the manufacturing sector. In addition, the data is used to compile the manufacturing sector component of quarterly national accounts. The survey was last redesigned in the June 2001 quarter.

Population

The target population for this survey is all kind-of-activity units (KAUs) operating in New Zealand that are classified as Manufacturing (Australian and New Zealand Standard Industrial Classification Division C) on Statistics New Zealand's Business Frame.

Sample design

The survey population is stratified according to:

- industries defined by the ANZSIC-based ANZIND classification at the working industry level
- size (in terms of rolling mean employment)
- turnover (annualised GST sales).

Each ANZIND working industry division contains between two and four substrata. Because of the contribution large units make to the economic activity within each industry group, they are all included in the sample. A portion of the remaining medium to large units is also included in the sample. In addition, small- to medium-sized businesses have their data modelled from administrative data (GST and Employee Monthly Survey (EMS)) sourced from Inland Revenue. All manufacturing KAUs belonging to a selected 'enterprise' are included.

About 1,600 units have been selected in the postal sample from the entire population, and approximately 17,000 units have their data modelled from tax data.

Sample maintenance

Sample maintenance is the process that maintains the sample over time, to reflect births, deaths, and other structural changes identified on the Business Frame. The information for Business Frame changes comes from a variety of sources, including GST registrations and respondent contact.

New enterprises are identified when they register for GST. Once a quarter, the new enterprises are selected into the sample using the same criteria as for the original sample. These are referred to as births. When an enterprise ceases trading, its manufacturing KAUs are removed from the survey. These are referred to as deaths.

Enterprises can also enter or leave the survey sample if they are reclassified from another industry to manufacturing. Reclassifications occur when an enterprise changes its main form of activity (eg from wholesale trade to manufacturing). These are usually identified in the Annual Frame Update Survey (AFUS) conducted in February each year.

Sample reselection

The sample for the QMS is reselected each quarter to ensure the sample reflects changes occurring in the manufacturing population.

Industry classifications

From the September 2001 quarter, QMS estimates have been published using industries defined by the ANZSIC-based ANZIND classification. The ANZSIC series are the official QMS statistics.

The introduction of ANZSIC ensures the industry classification used by Statistics NZ better reflects contemporary economic activity. It also improves the comparability of statistics produced in New Zealand and Australia.

Measurement errors

Errors in the survey are divided into two classes:

Non-sampling error

Non-sampling error includes errors arising from biases in the patterns of response and non-response, inaccuracies in reporting by respondents, and errors in the recording and coding of data. The size of these errors is difficult to quantify. Data is subject to revision if significant errors are detected in subsequent quarters.

Sampling error

Sampling error is a measure of the variability that occurs by chance because a sample, rather than an entire population, is surveyed.

Definitions

ANZSIC

Australian and New Zealand Standard Industrial Classification system.

ANZIND

An ANZSIC-based classification used to group industries for publication.

Business Frame

A register of all economically significant businesses operating in New Zealand. The population of the QMS is drawn from the Business Frame.

Enterprise

A business entity operating in New Zealand either as a legally constituted body such as a company, partnership, trust, local or central government trading organisation, or as a self-employed individual.

Kind-of-activity unit (KAU)

A subdivision of an enterprise engaged in predominantly one activity and for which a single set of accounting records is available.

Rolling Mean Employment (RME)

RME is a 12-month moving average of the monthly employee count (EC) figure which replaces the numbers of full-time and part-time employees.

Operating income

Income from total sales. This includes:

- sales of processed goods
- sales of goods purchased for resale
- sales of services
- repair services
- manufacturing and processing fees
- management fees
- rental income
- leasing income
- royalties
- patent fees.

Operating income may contain end-of-year payouts that relate to production from earlier quarters. Operating income excludes:

- donations
- insurance claims
- subsidies/government grants
- exchange rate gains
- extraordinary items
- gains on sales of fixed assets
- excise duties
- bad debts.

Purchases and operating expenditure

This includes:

- purchases of goods for resale
- purchases of goods and materials for production
- motor vehicle expenses
- electricity and fuels
- management fees
- telecommunication expenses
- charges and fees paid to other businesses/divisions
- general operating expenditure (eg freight, rent)
- royalties
- patent fees.

Purchases and operating expenditure may incorporate payments for materials or services that may relate to quarters other than those in which they are recorded.

Purchases and operating expenditure excludes:

- interest/dividend payments
- sales tax
- excise duties
- fringe benefit tax
- donations
- bad debts
- extraordinary items
- exchange rate losses
- losses on sales of fixed assets
- depreciation.

Salaries and wages

Gross salaries and wages paid to employees during the quarter, excluding salaries and wages to working proprietors and drawings.

Stocks of raw materials

Closing stocks of raw materials for use in production.

Stocks of finished goods

Closing stocks of finished goods, work in progress and trading stocks.

Additions to fixed assets

This includes purchases of land, and other fixed assets and capital works by own employees. It excludes any revaluation of fixed assets.

Disposals of fixed assets

This includes sales of land or other fixed assets (reported at sale price). It excludes any devaluation of fixed assets.

Use of manufacturing data in quarterly national accounts

A key use of the QMS is in the calculation of manufacturing value added for the compilation of quarterly Gross Domestic Product (GDP).

Base year manufacturing value added is extrapolated using volume indexes. For each ANZSIC division, volume indexes are calculated from deflated sales and the deflated finished goods stock change. Sub-indexes from the Producers Price Index (PPI) are used for deflating QMS sales and finished goods stocks.

QMS data is supplemented with production data for the following industries:

- meat and dairy product

- petroleum and industrial chemical
- basic metal.

Seasonally adjusted series

The X-12-ARIMA package has been used to produce the seasonally adjusted estimates and trend estimates for sales in all subdivisions. Seasonal adjustment aims to eliminate the impact of regular seasonal events (such as annual cycles in agricultural production, winter or annual holidays) on time series. This makes the data for adjacent quarters more comparable.

All seasonally adjusted figures are subject to revision each quarter. This enables the seasonal component to be better estimated and removed from the series.

The X-12-ARIMA seasonal adjustment package is a very robust procedure; however, it has problems when there has been an abrupt change in the seasonal variation, as do other seasonal adjustment packages.

As a result of the restructuring within the dairy industry, there has been a discontinuity in the meat and dairy product and total manufacturing series. The seasonal pattern of the dairy series may have become less closely tied to production cycles due to the removal of the monopsony in the industry. Should this occur, it is likely that the seasonality of the total sales series will also change, as it has been strongly influenced by the seasonality of the meat and dairy series. Therefore, a seasonal movement of a given magnitude in the meat and dairy product and total manufacturing series before June 2002 may not have the same meaning as a seasonal movement of a similar magnitude after June 2002.

Since September 2002, the dairy series have been adjusted to take some account of this expected change in behaviour. There may be further revisions to the meat and dairy, and the total manufacturing series, as further information becomes available which enables Statistics NZ to better quantify the effect of the changes in the dairy industry.

Due to the changes in the meat and dairy series, it has been decided to change the seasonal adjustment method for total sales from direct to indirect. This will allow the series to better respond to changes in the seasonality of the components, and was considered preferable to our usual selection criteria. More information on direct and indirect adjustment is available on our website www.stats.govt.nz in the [seasonal adjustment FAQ pages](#).

For further information contact seasonaladjustment@stats.govt.nz.

The trend series are calculated using the X-12-ARIMA seasonal adjustment package. They are based on a five- or seven-term moving average of the seasonally adjusted series, with an adjustment for outlying values.

Trend estimates towards the end of the series incorporate new data as they become available and can therefore change as more observations are added to the series. Revisions can be particularly large if an observation is treated as an outlier in one quarter, but is found to be part of the underlying trend as further observations are added to the series. Typically, only the estimates for the most recent quarter will be subject to substantial revisions.

Volume series

These are value series that have been adjusted by a price index to remove the effect of price changes. They can then be used for measuring quantity change. The volume series, at present, are expressed in December 1997 quarter dollars.

Values are adjusted using sub-indexes from the PPI. These sub-indexes measure price movements in each of the 15 published manufacturing industries, as well as total manufacturing. When the value series are divided by the respective sub-indexes, price effects are removed and a volume measure remains. The PPI sub-indexes are available on Infoshare.

More information

For more information, follow the [link](#) from the technical notes of this release on the Statistics NZ website.

Estimated trend

For any series, the survey estimates can be broken down into three components: trend, seasonal and irregular. While seasonally adjusted series have had the seasonal component removed, trend series have had both the seasonal and irregular components removed. Trend estimates reveal the underlying direction of movement in a series, and are likely to indicate turning points more accurately than are seasonally adjusted estimates.

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Timing

Timed statistical releases are delivered using postal and electronic services provided by third parties. Delivery of these releases may be delayed by circumstances outside the control of Statistics NZ. Statistics NZ accepts no responsibility for any such delays.

Tables

As previously announced on [Infoshare](#), the tables which accompany this release have been updated. These changes are designed to make the tables both more user-friendly and more closely aligned with the text of the release. Tables also now include trend data for sales volumes. No series identifiers have been altered and all previously available data is still included. If you would like a copy of the tables in the previous format please email info@stats.govt.nz.

The following tables are printed with this Hot Off The Press and can also be downloaded from the Statistics New Zealand website in Excel format. If you do not have access to Excel, you may use the [Excel file viewer](#) to view, print and export the contents of the file.

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Statistics for the Economic Survey of Manufacturing are also available from our online database [Infoshare](#).