

The devil is in the detail: what's behind manufacturing growth and decline in Melbourne 2011-2011

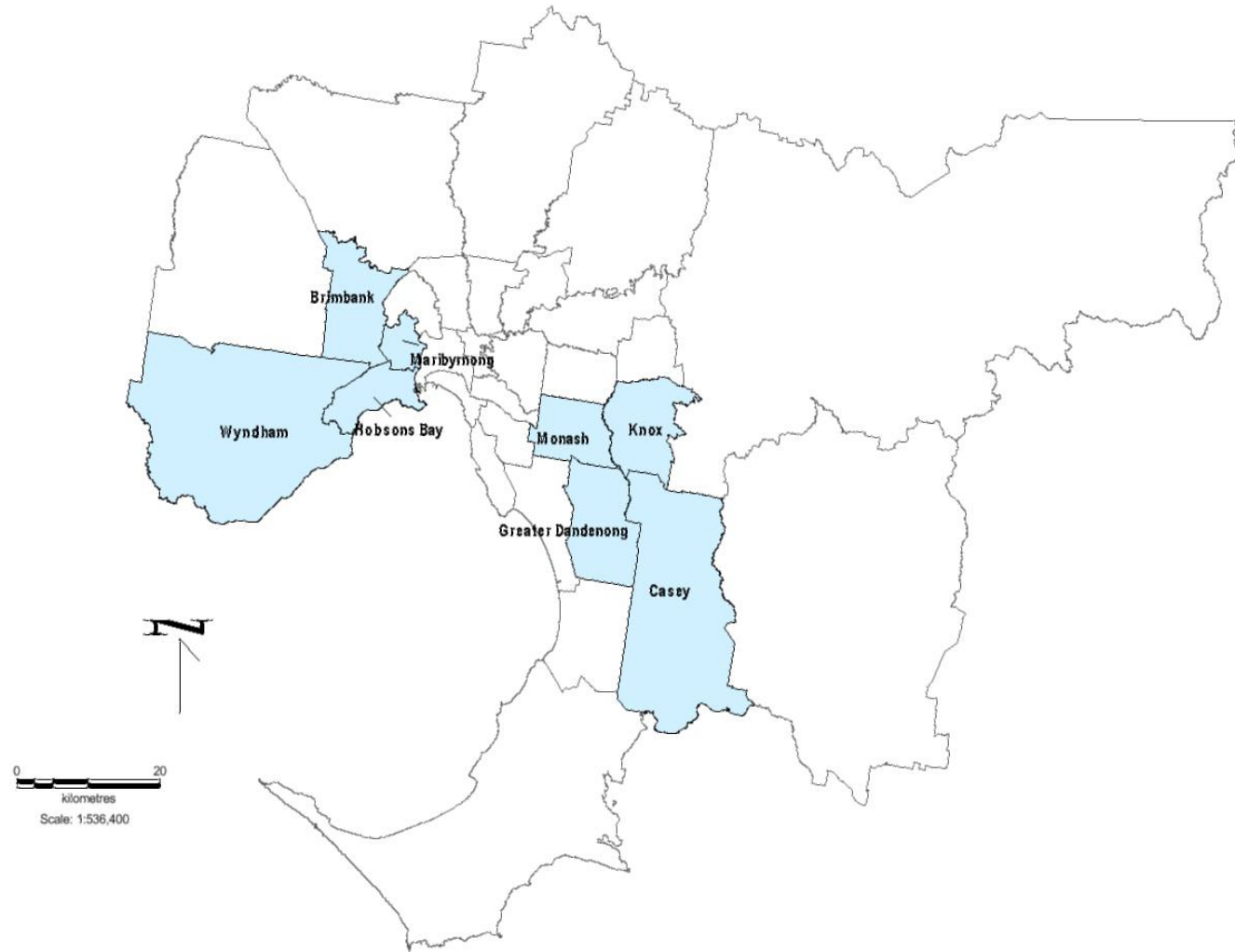
Anthony Kent and Kathleen Hurley, Victoria University, Melbourne

Industry focus

- Three key 'indicator' sub-sectors or models of manufacturing – 'digit 2' level
 - TCF
 - Transport equipment aka car manufacturing and suppliers
 - Food

Locality focus: Two regions – West and South East

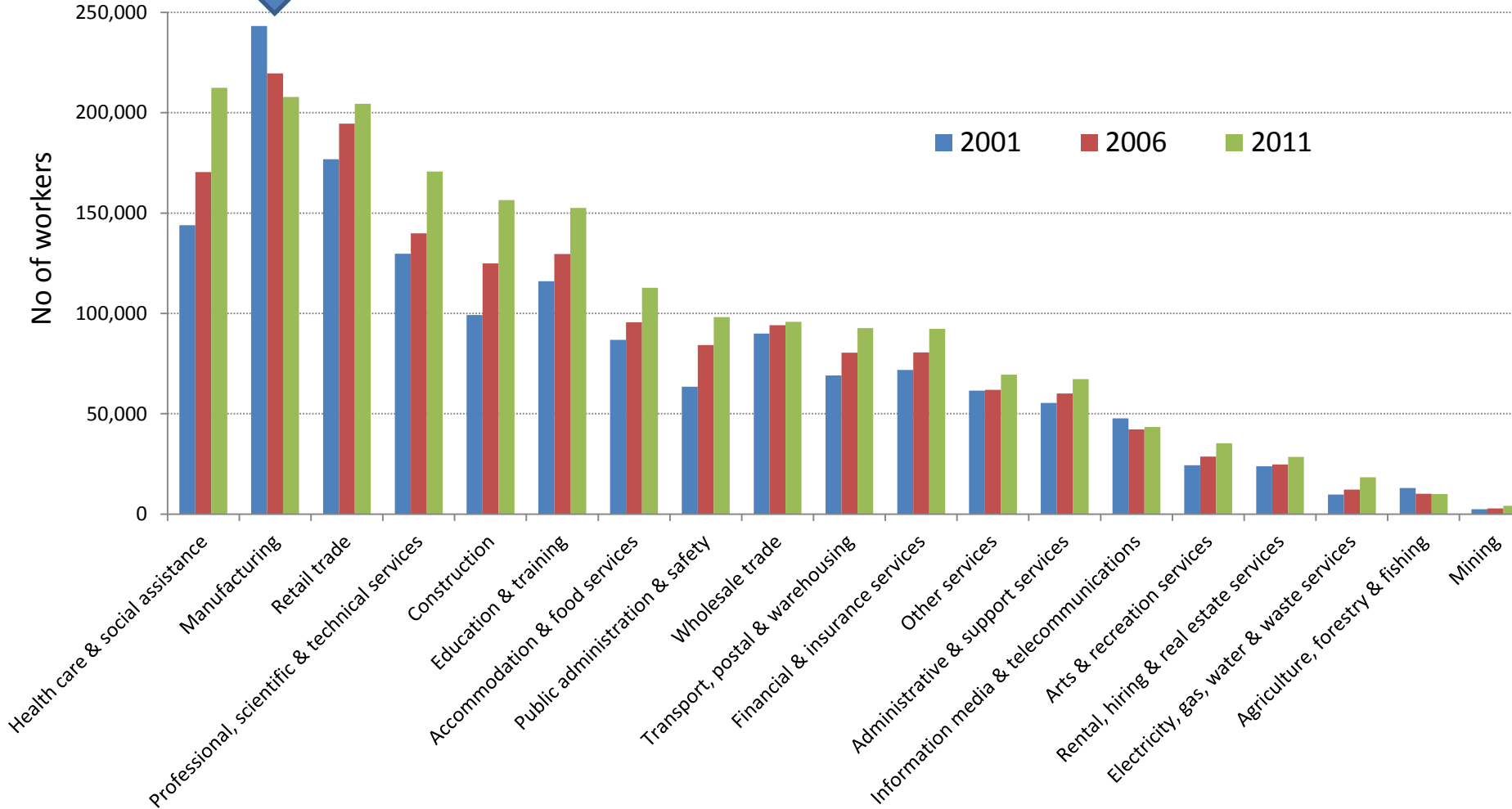
- West: Hobsons Bay, Maribyrnong, Wyndham, Brimbank
- East: Knox, Greater Dandenong, Monash, Casey



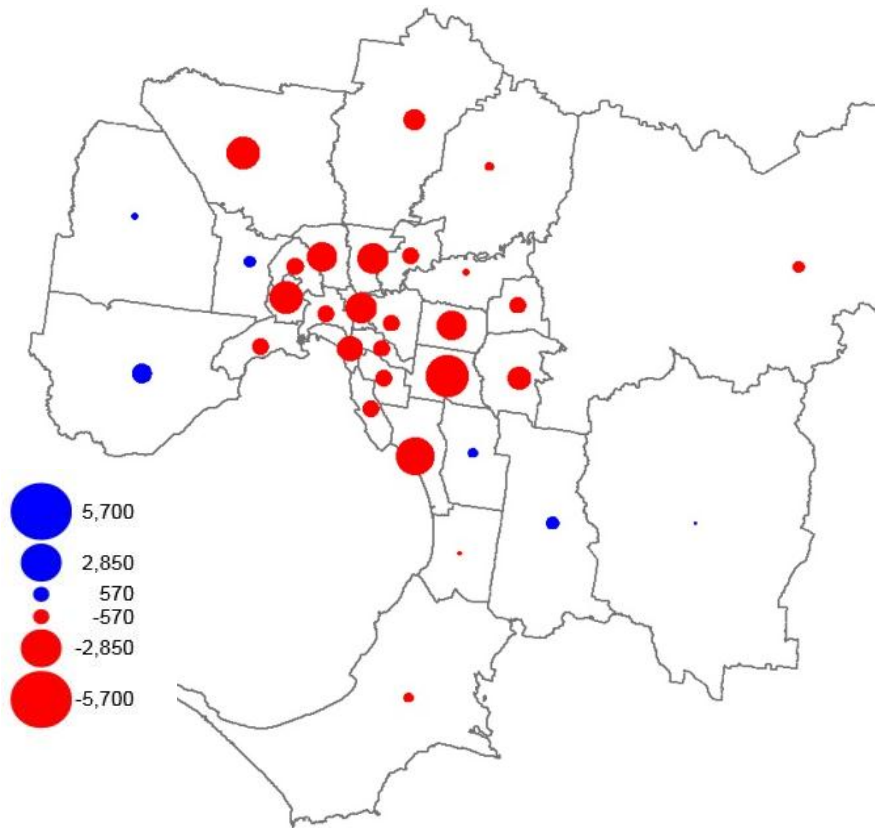
2001, 2006, 2011

Firm	Source
Job loss/gain	Census
Number of employees	Worksafe Victoria
Location quotient	Census
Labour Market	
Labourer/Trades-Technicians Ratio	Census
FM/M Ratio	Census
Part-time/Full-time ratio	Census

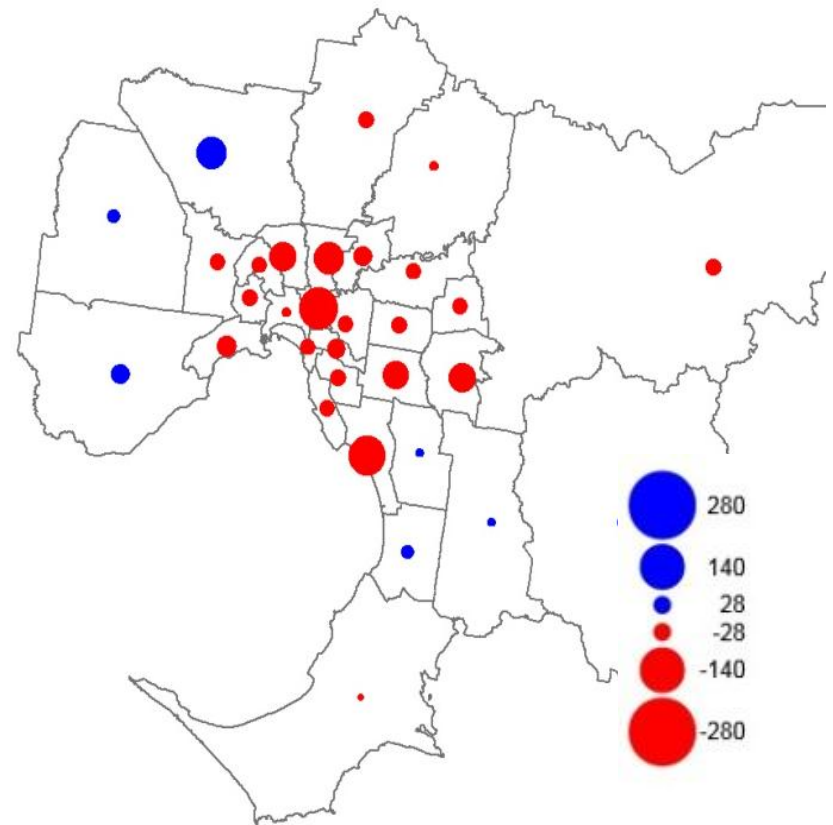
Manufacturing & other sectors, Melbourne 2001-2011



Manufacturing employment change by LGA 2001-2011



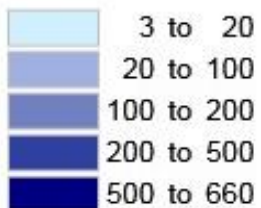
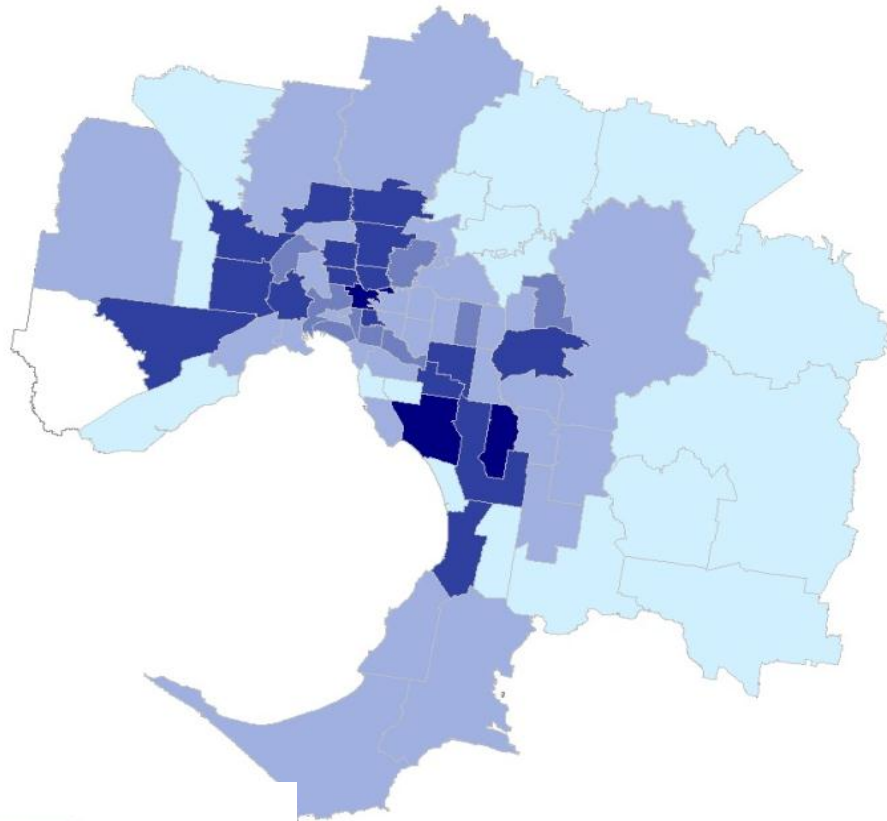
Manufacturing business change by LGA 2001-2011



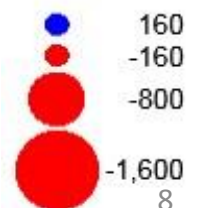
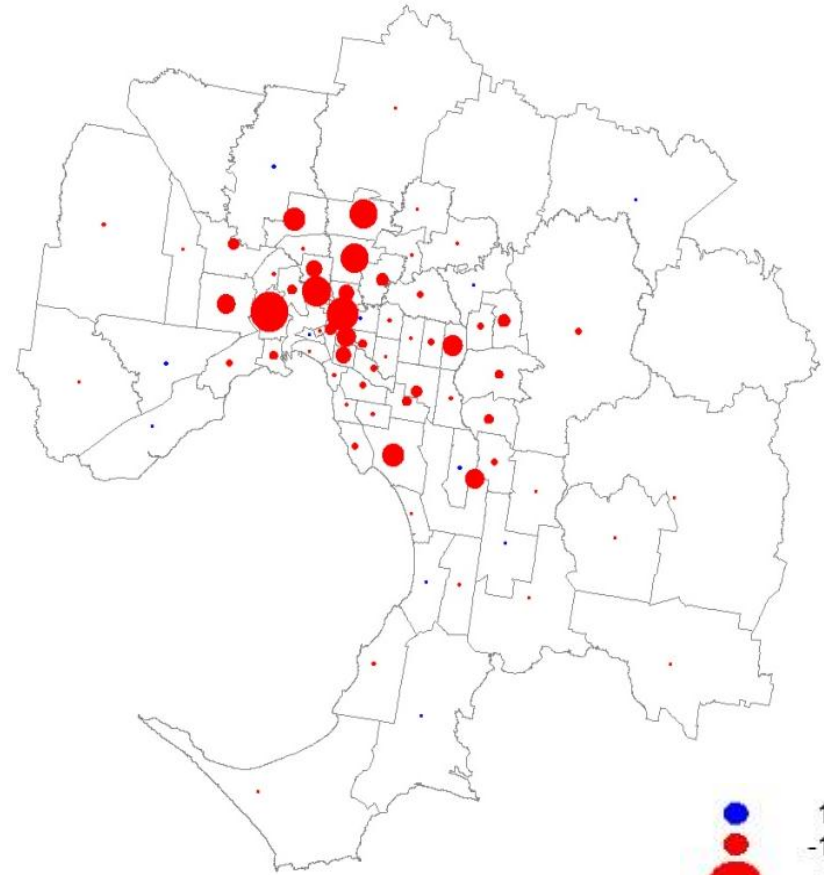
**TCF, Cars, Food: What
has become of these
three sectors
2001-2011?**

Textile, Clothing and Footwear Manufacturing employment Melbourne 2001-2011

Employment 2011

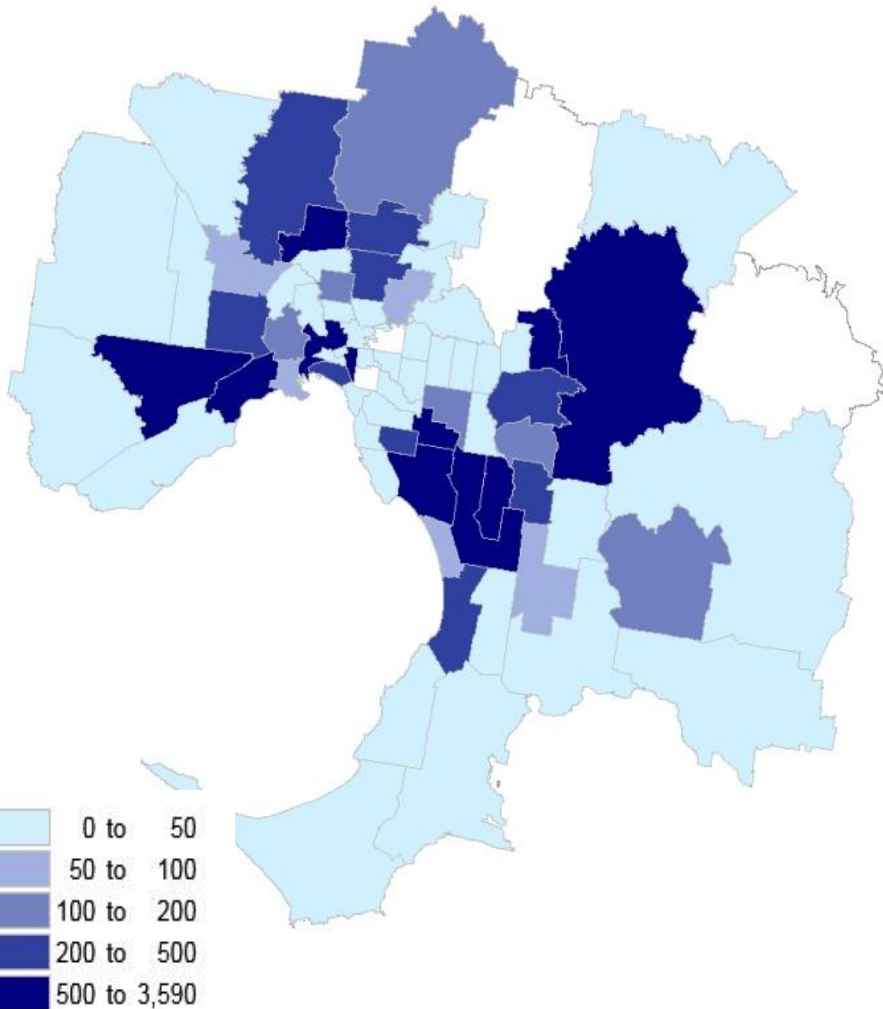


Change 2001-2011

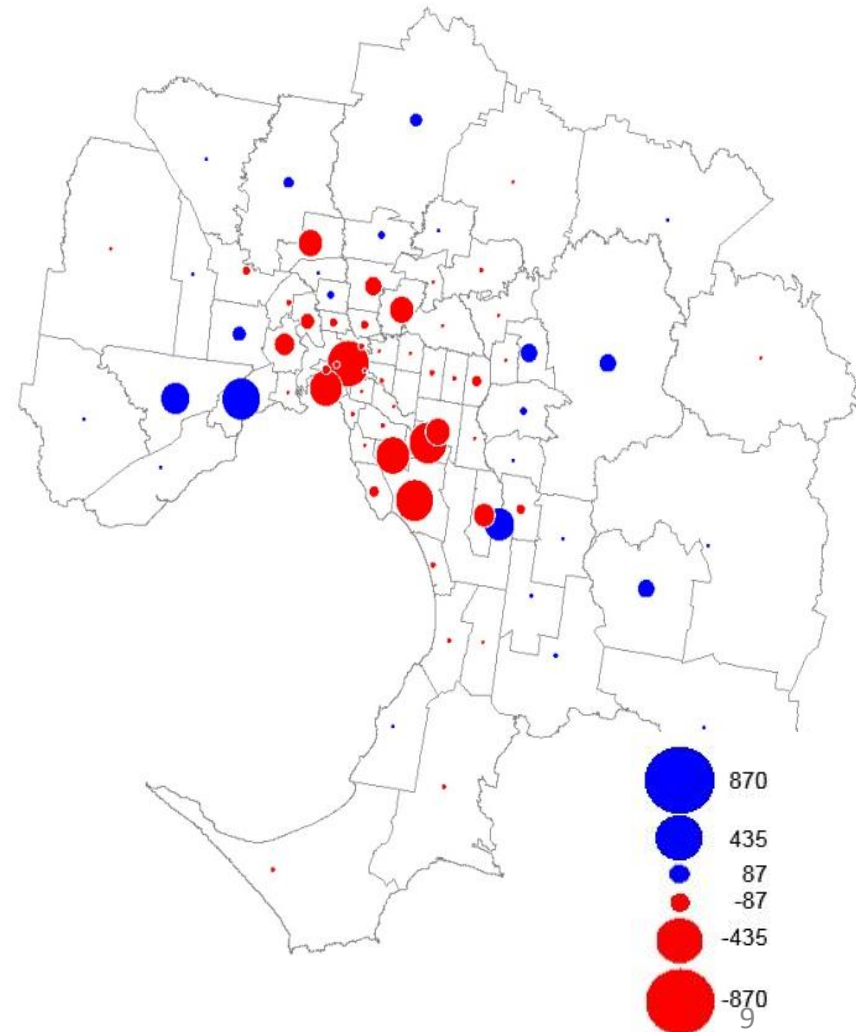


Transport Equipment employment Melbourne 2001-2011

Employment 2011

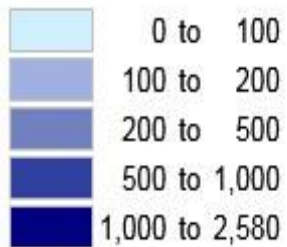
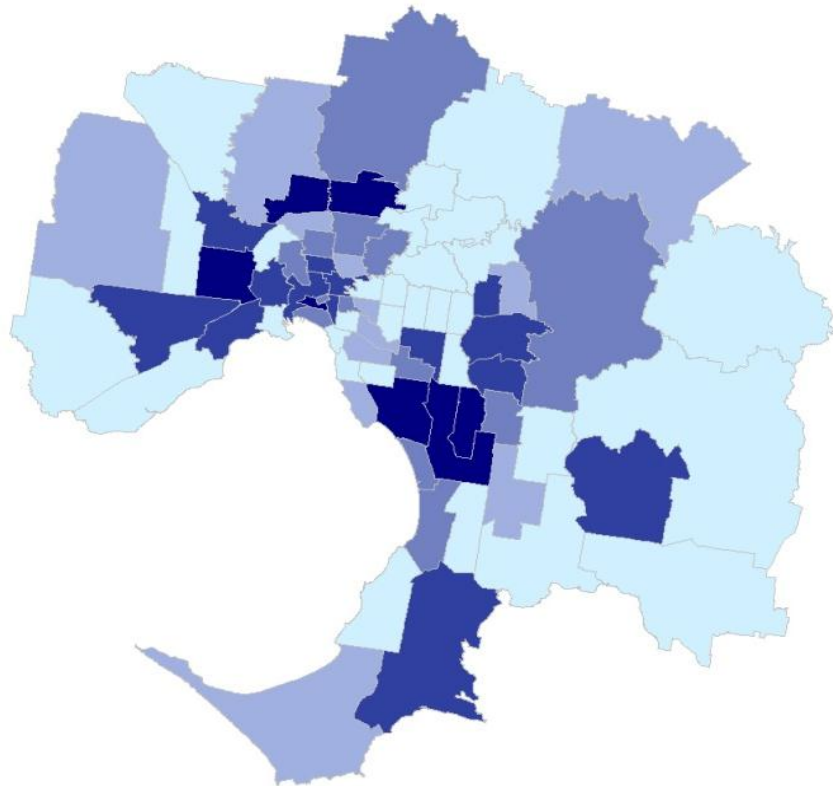


Change 2001-2011

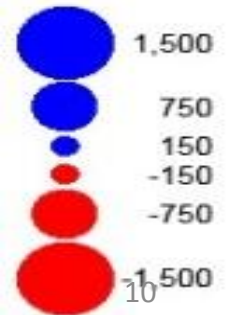
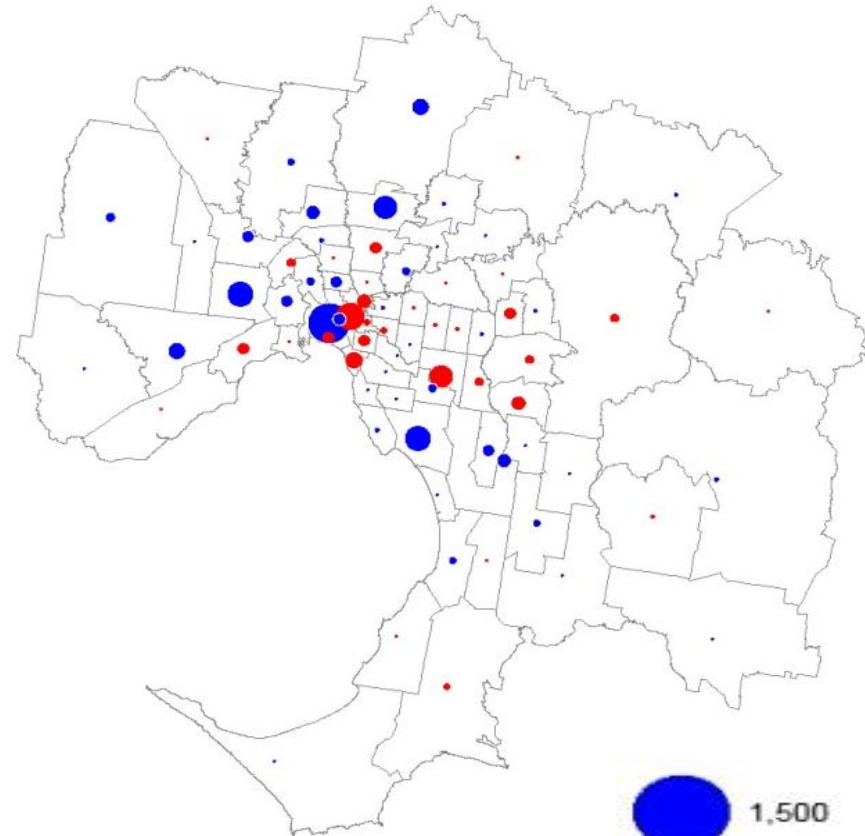


Food Processing employment Melbourne 2001-2011

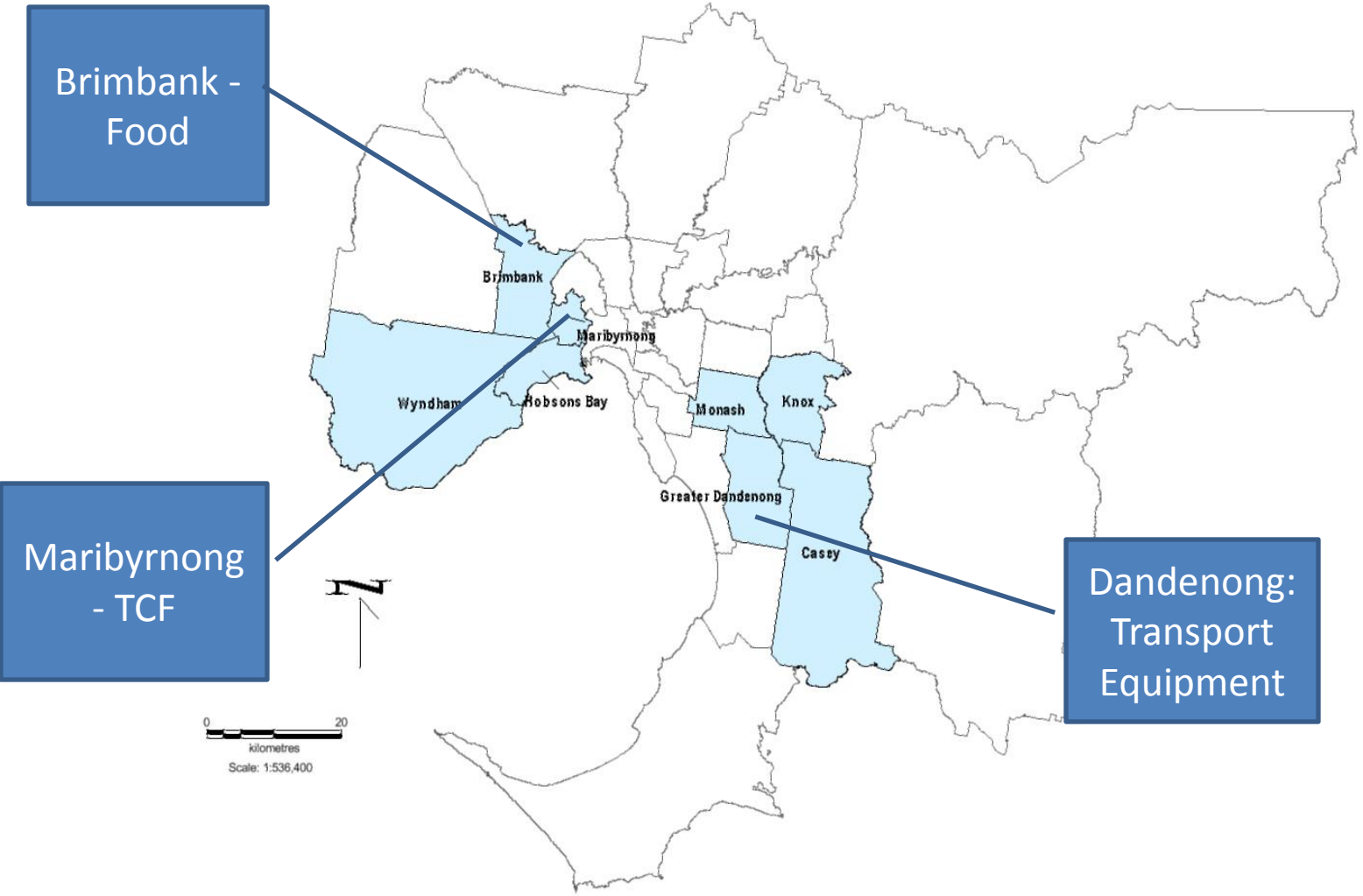
Employment 2011



Change 2001-2011

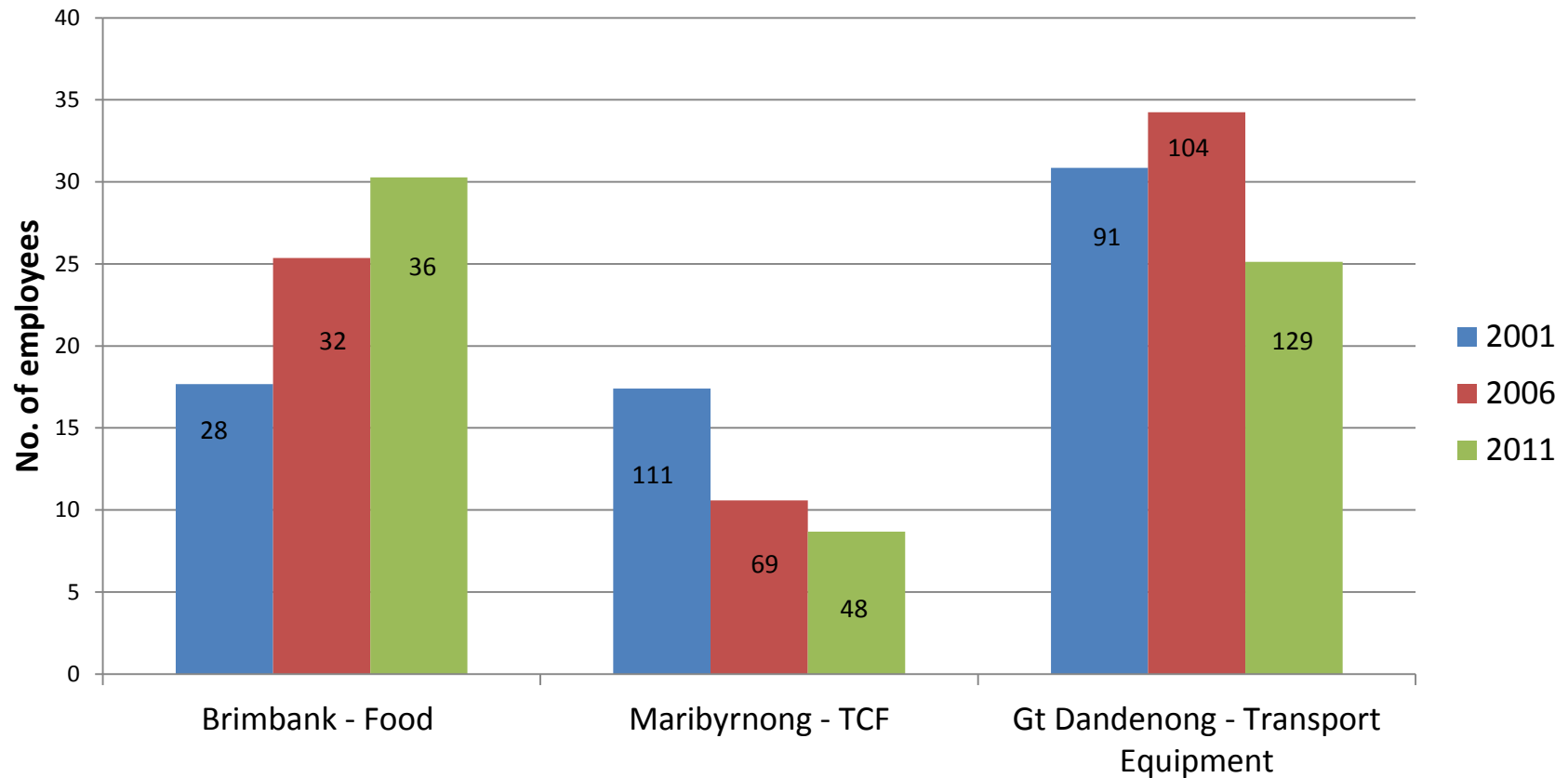


Focus on three LGAs and sub-sectors

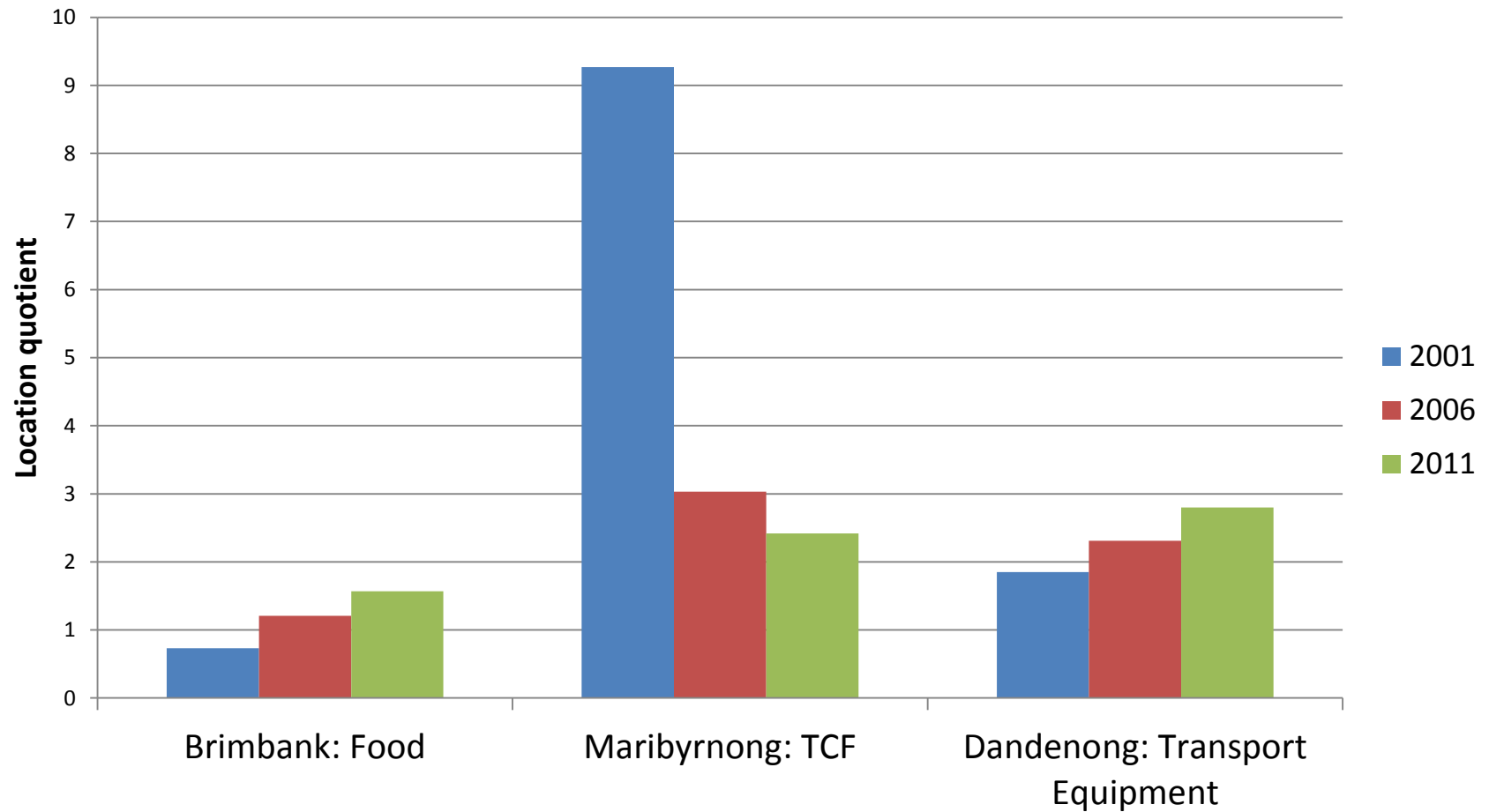


Average firm size (number of employees)

Average firm size 2001-2011

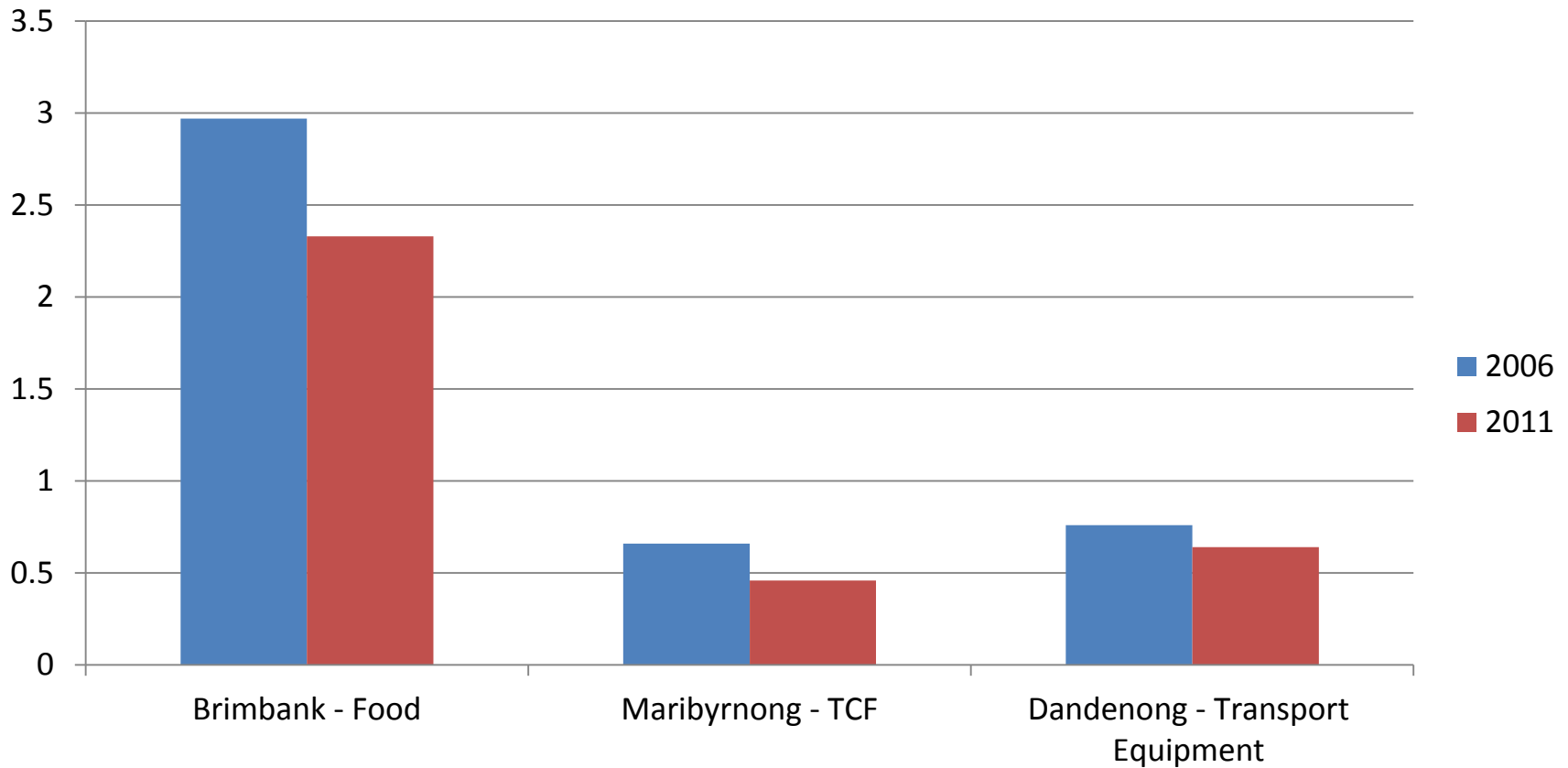


Location Quotients



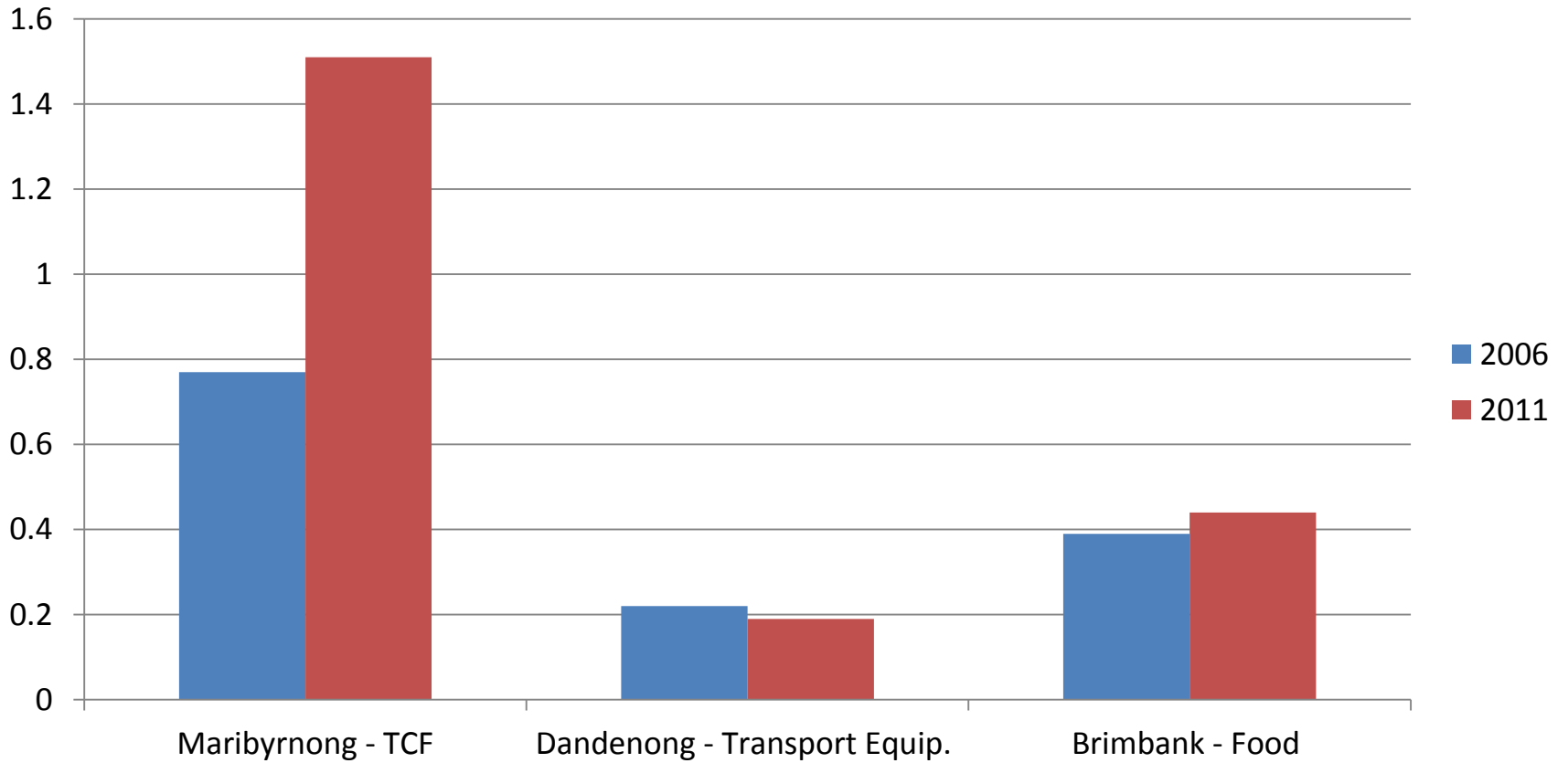
Labourers/Trades-Technicians Ratio 06-11

Labourers to Trades/Technicians Ratio



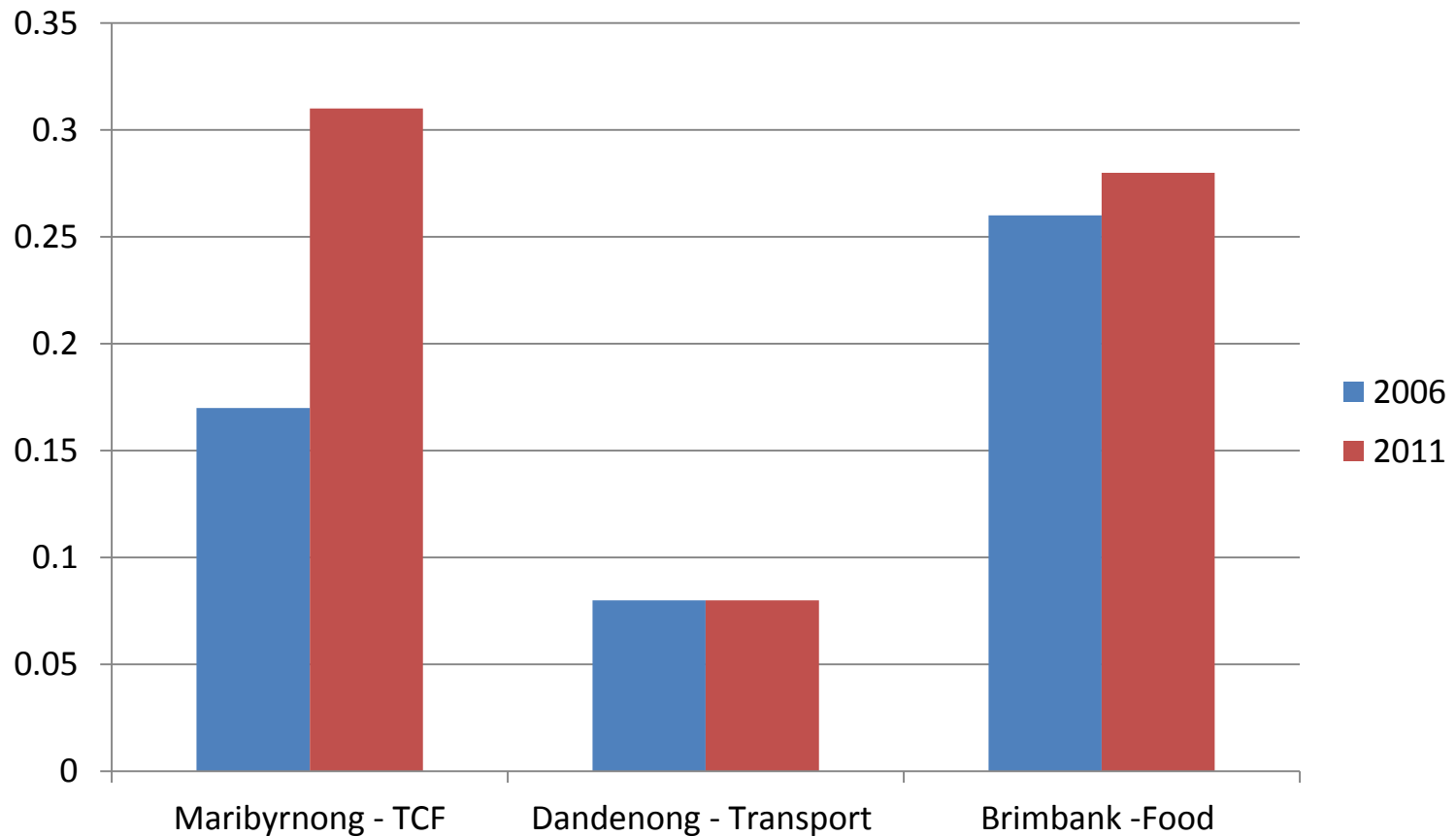
Female to Male Ratio 06-11

Female to Male Ratio



Part-time and Full-time jobs 06-11

Ratio of part-time to full-time jobs



Labourers/ Trades-Technicians: Food 06-11

Food 2006-2011



Further research

- Manufacturing has declined proportionally overall but there are job increases in some sub-sectors and some locations
- The structure of particular sub-sectors (gender, hours etc) changes over time
- Variations and similarities in outcomes by location and subsector
- More work: To further document and theorise links between industrial outcomes and location
 - Macro
 - Aussie dollar, imports, overseas competition
 - Mid-level
 - Allocation and withdrawal of grants and other subsidies, federal and state policy
 - Local
 - Labour market-housing market links; labour market skills and participation, Industrial zones
- How?
 - Deeper data
 - From there... Identify individual case study firms and their circumstances
 - Explanations may range from the 'big hit? To changes in labour availability? Infrastructure issues?

The devil is in the detail: what's behind manufacturing growth and decline in Melbourne 2011- 2011

Anthony Kent and Kathleen Hurley, Victoria University, Melbourne