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## B Combined assistance estimates

This appendix provides updated estimates of combined assistance for the years 1997-98 and 2000-01 to 2003-04. The combined estimates include:

- Australian Government budgetary assistance;
- tariff assistance; and
- agricultural pricing and regulatory assistance.

The combined estimates exclude State budgetary assistance and assistance provided through restrictions on services trade and anti-dumping measures, as well as other forms of assistance that are not captured in the Commission's estimates (see chapter 2).

Tables B.1 and B.2 report estimates of the dollar value of combined assistance, or *net subsidy equivalent*, and the *effective rate of combined assistance*, respectively, for different industry groupings. A more detailed discussion of these measures is provided in chapter 2.

**Table B.1 Combined<sup>a</sup> net subsidy equivalent<sup>b</sup> by industry grouping, 1997-98 and 2000-01 to 2003-04 (\$ million)**

<i>Industry grouping</i>	<i>1997-98</i>	<i>2000-01</i>	<i>2001-02</i>	<i>2002-03</i>	<i>2003-04</i>
<b>Primary production<sup>c</sup></b>	<b>1255.5</b>	<b>903.6</b>	<b>1207.0</b>	<b>1415.3</b>	<b>1273.4</b>
Dairy cattle farming	525.9	216.4	313.8	244.7	211.0
Grain, sheep and beef cattle farming	291.4	277.8	432.6	663.2	498.3
Horticulture and fruit growing	111.6	112.7	148.5	180.1	169.3
Other crop growing	57.4	89.4	83.4	97.5	131.0
Other livestock farming	14.6	15.8	22.3	36.6	24.7
Fisheries	35.5	43.2	56.4	62.6	68.4
Forestry	33.3	20.8	36.3	34.2	46.5
Other primary production <sup>d</sup>	7.1	9.9	13.6	13.7	17.6
<b>Mining<sup>c</sup></b>	<b>159.5</b>	<b>42.5</b>	<b>39.3</b>	<b>-5.7</b>	<b>-54.7</b>
<b>Manufacturing<sup>c</sup></b>	<b>5525.1</b>	<b>5125.9</b>	<b>5464.6</b>	<b>5600.7</b>	<b>5989.5</b>
Food, beverages & tobacco	822.9	971.3	953.0	1005.9	1084.8
Textiles, clothing, footwear & leather	1105.7	739.7	853.0	853.2	921.5
Wood & paper products	286.4	301.6	344.4	383.4	416.4
Printing, publishing & media	135.5	171.0	184.9	190.9	212.0
Petroleum, coal, chemical & assoc. prod.	786.4	769.7	844.4	871.0	900.3
Non-metallic mineral products	131.5	142.0	149.9	153.9	171.8
Metal product manufacturing	674.1	674.7	625.0	655.6	709.8
Motor vehicles & parts	897.5	659.5	723.4	752.6	799.8
Other transport equipment	-4.9	71.3	73.2	32.5	24.3
Other machinery & equipment	357.9	330.1	369.8	335.3	315.6
Other manufacturing	143.0	174.3	205.8	204.9	288.1
<b>Services<sup>c</sup></b>	<b>-1218.0</b>	<b>-1265.4</b>	<b>-1441.8</b>	<b>-1777.9</b>	<b>-1939.2</b>
Electricity, gas & water supply	36.5	8.3	-5.1	-8.5	-22.3
Construction	-553.1	-570.5	-664.6	-777.9	-877.2
Wholesale trade	-96.2	-91.1	-110.3	-124.2	-132.9
Retail trade	-146.0	-140.6	-171.2	-188.4	-205.8
Accommodation, cafes & restaurants	-144.2	-153.1	-152.9	-161.1	-176.1
Transport & storage	-10.6	-72.2	-94.8	-115.9	-146.6
Communication services	-20.8	23.3	20.2	13.9	31.8
Finance & insurance	68.7	84.2	41.2	16.8	16.7
Property & business services	-142.8	-124.9	-103.2	-160.6	-170.0
Government administration & defence	-160.2	-166.7	-183.9	-196.9	-211.3
Education	-17.2	-24.6	-28.2	-33.9	-36.9
Health & community services	-57.5	-45.1	-45.9	-59.9	-52.6
Cultural & recreational services	62.9	41.7	38.4	48.4	92.2
Personal & other services	-47.4	-51.2	-57.3	-65.7	-67.7

<sup>a</sup> 'Combined assistance' comprises budgetary, tariff and agricultural pricing and regulatory assistance, as reported in tables 2.1, 2.2 and 2.3 respectively. The total NSE has been adjusted to take account of programs included in both tariff and budgetary assistance. <sup>b</sup> NSE estimates are derived using ABS Industry Gross Value Added at current prices data. This information is subject to periodic revision by the ABS. <sup>c</sup> Totals may not add due to rounding. Sectoral totals also include assistance to the sector that has not been allocated to specific industry groupings. <sup>d</sup> Other primary production includes *services to agriculture, hunting and trapping and poultry farming*.

Source: Commission estimates.

**Table B.2 Effective rate of combined<sup>a</sup> assistance<sup>b</sup> by industry grouping, 1997-98 and 2000-01 to 2003-04 (per cent)**

<i>Industry grouping</i>	1997-98	2000-01	2001-02	2002-03	2003-04
<b>Primary production<sup>c</sup></b>	<b>5.8</b>	<b>3.2</b>	<b>3.6</b>	<b>5.4</b>	<b>4.1</b>
Dairy cattle farming	37.8	12.6	15.4	16.2	12.0
Grain, sheep and beef cattle farming	3.1	2.1	2.6	5.3	3.3
Horticulture and fruit growing	3.3	2.7	3.0	4.9	4.0
Other crop growing	2.4	3.1	2.4	3.8	4.3
Other livestock farming	2.0	1.6	1.9	4.2	2.4
Fisheries	2.7	2.7	3.3	3.4	3.8
Forestry	5.3	2.6	4.4	3.8	5.3
Other primary production <sup>d</sup>	0.3	0.3	0.4	0.5	0.6
<b>Mining<sup>c</sup></b>	<b>0.5</b>	<b>0.1</b>	<b>0.1</b>	<b>0.0</b>	<b>-0.1</b>
<b>Manufacturing<sup>c</sup></b>	<b>5.3</b>	<b>4.7</b>	<b>4.8</b>	<b>4.6</b>	<b>4.5</b>
Food, beverages & tobacco	3.4	3.6	3.7	3.6	3.7
Textiles, clothing, footwear & leather	25.8	20.6	26.2	24.7	24.2
Wood & paper products	4.7	4.9	4.9	4.8	4.7
Printing, publishing & media	1.4	1.5	1.5	1.4	1.4
Petroleum, coal, chemical & assoc. prod.	5.0	4.6	4.3	4.3	4.0
Non-metallic mineral products	2.5	2.5	2.5	2.3	2.3
Metal product manufacturing	4.0	4.2	4.2	4.4	4.4
Motor vehicles & parts	14.0	11.3	11.2	10.8	10.6
Other transport equipment	-0.2	3.4	3.2	1.3	0.9
Other machinery & equipment	3.5	3.0	3.0	2.6	2.3
Other manufacturing	4.0	4.3	4.2	4.1	5.4

<sup>a</sup> 'Combined assistance' comprises budgetary, tariff and agricultural pricing and regulatory assistance, as reported in tables 2.1, 2.2 and 2.3 respectively. <sup>b</sup> ERAs have not been estimated for the services sector. <sup>c</sup> Sectoral ERAs also include assistance to the sector that has not been allocated to specific industry groupings. <sup>d</sup> Other primary production includes *services to agriculture, hunting and trapping and poultry farming*.

Source: Commission estimates.