



**Australian Government**  
**Productivity Commission**

Trade and Assistance  
Review 2017-18

Methodological  
Annex

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### **The Productivity Commission**

The Productivity Commission is the Australian Government's independent research and advisory body on a range of economic, social and environmental issues affecting the welfare of Australians. Its role, expressed most simply, is to help governments make better policies, in the long term interest of the Australian community.

The Commission's independence is underpinned by an Act of Parliament. Its processes and outputs are open to public scrutiny and are driven by concern for the wellbeing of the community as a whole.

Further information on the Productivity Commission can be obtained from the Commission's website ([www.pc.gov.au](http://www.pc.gov.au)).

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# 1 About this annex

The Commission publishes quantitative estimates of assistance to Australian industry each year in its *Trade and Assistance Review*. The Commission's estimates focus on the main forms of support — tariffs, budgetary outlays and tax concessions — that selectively assist firms, activities or industries and that can be quantified on an annual basis given practical constraints in measurement and data availability.

This annex reports on changes made to the Commission's assistance estimates for *Trade and Assistance Review 2017-18*. These changes comprise:

- programs added to the estimates for 2017-18 (chapter 2)
- programs for which funding ceased in 2017-18 (chapter 3)
- methodological changes to how the tariff assistance estimates are derived (chapter 4).

This annex is the latest in a series that provides detailed information and updates on the Commission's assistance estimates and methodologies. Other relevant annexes, published since 2000, are listed in table 1.1. The Methodological Annex to the *Trade and Assistance Review 2011-12*, contains a comprehensive benchmark listing of budgetary items included in assistance estimates. Updates to that list are notified in each subsequent annex.

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**Table 1.1 Previous annexes to Trade and Assistance Review**

<i>Date</i>	<i>Title</i>	<i>Details</i>
December 2000	Allocating Budgetary Assistance by 27 ANZSIC based Industry Groupings	<i>Methodological Annex: Trade and Assistance Review 1999-2000</i>
December 2002	The Commission's Assistance Measurement System	<i>Methodological Annex A: Trade and Assistance Review 2001-02</i>
December 2002	Allocating Budgetary Assistance to Primary Production by 10 ANZSIC based Industry Groupings	<i>Methodological Annex B: Trade and Assistance Review 2001-02</i>
June 2006	Allocating Budgetary Assistance by Industry Groupings: Recent Revisions	<i>Methodological Annex: Trade and Assistance Review 2004-05</i>
December 2008	The '2001-02' series of assistance estimates	<i>Methodological Annex: Trade and Assistance Review 2005-06 and 2006-07</i>
December 2011	Methodological Annex: for Reviews Commencing 2008-09	<i>Methodological Annex: Trade and Assistance Review 2008-09</i>
June 2012	Changes to the Commission's Assistance Estimates	<i>Methodological Annex: Trade and Assistance Review 2010-11</i>
February 2014	Estimation Framework, Coverage and Re-benchmarking of Estimates	<i>Methodological Annex: Trade and Assistance Review 2011-12</i>
October 2014	Changes to the Commission's Assistance Estimates	<i>Methodological Annex: Trade and Assistance Review 2012-13</i>
November 2015	Changes to the Commission's Assistance Estimates	<i>Methodological Annex: Trade and Assistance Review 2013-14</i>
October 2017	Estimation Framework, Coverage and Re benchmarking of Estimates	<i>Methodological Annex: Trade and Assistance Review 2015-16</i>
May 2018	Methodological Annex	<i>Methodological Annex: Trade and Assistance Review 2016-17</i>

Source: [www.pc.gov.au/research/ongoing/trade-assistance](http://www.pc.gov.au/research/ongoing/trade-assistance).

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## 2 Programs added to the assistance estimates in 2017-18

This chapter describes Australian Government budgetary programs added to the assistance estimates for *Trade and Assistance Review 2017-18*. Table 2.1 lists these measures.

### **Beef Week and the Beef Australia Expo**

Beef Week and the Beef Australia Expo are Australia's premier cattle industry promotional events and are intended to showcase the Australian beef industry to both domestic and international buyers. Beef Week is an annual event held in Casino, New South Wales, while the Beef Australia Expo is held once every three years in Rockhampton, Queensland. The last Expo was held in 2018 and attracted over 100 000 visitors including more than 1200 international visitors. This event includes a series of industry based seminars, trade shows and cattle competitions (DITCRD 2019).

The value of Australian Government administered expenses for 2017-18 was \$2.4 million (DAWR 2018, p. 120).

The program is assessed as initially benefiting firms engaged in beef cattle farming and has been allocated to the sheep, beef cattle and grain farming industry grouping.

### **Northern Australia Rice Industry**

In 2016, the Australian Government announced it would provide \$4 million over four years to fund research, development and extension projects to assist in establishing and increasing the scale of the Northern Australia rice industry. The project is being delivered through AgriFutures Australia and funded research is intended to examine varietal breeding and selection, pests and disease implications, agronomy, grower adoption and post-harvest handling issues in the region (DITCRD 2019).

The value of Australian Government administered expenses for 2017-18 was \$1 million (DAWR 2018, p. 120).

This program is assessed as initially benefiting firms engaged in rice growing activities and has been allocated to the sheep, beef cattle and grain farming industry grouping.

**Table 2.1 Budgetary measures added to the assistance estimates for Trade and Assistance Review 2017-18**

<i>Program</i>	<i>Form<sup>a</sup></i>	<i>Initial benefiting industry</i>	<i>Assistance value 2017-18 (\$m)</i>
Beef Week and the Beef Australia Expo	BO	Sheep, beef cattle and grain farming	2.4
Northern Australia Rice Industry	BO	Sheep, beef cattle and grain farming	1.0
Export and Regional Wine Support Package	BO	Horticulture and fruit growing	17.3
Drought Concessional Loans Scheme (Administration)	BO	Unallocated primary production	2.1
Drought Recovery Concessional Loans Scheme (Administration)	BO	Unallocated primary production	0.2
Leadership in Agriculture Industries Fund	BO	Unallocated primary production	3.8
Murray-Darling Basin Regional Economic Diversification Program	BO	Unallocated primary production	5.1
Advanced Manufacturing Growth Fund	BO	Mining, Food, beverages and tobacco, Petroleum, coal, chemical and rubber products, Non-Metallic mineral products, Metal and fabricated metal products, Motor vehicle and parts, Machinery and equipment manufacturing, Health care and social assistance	2.8
Entrepreneurs' Programme - Innovation Connections	BO	Horticulture and fruit growing, Sheep, beef cattle and grain farming, Other crop growing, Dairy cattle farming, Aquaculture and fishing, Primary production support services, Mining, Food, beverages and tobacco, Textile, leather, clothing and footwear, Petroleum, coal, chemical and rubber products, Non-Metallic mineral products, Metal and fabricated metal products, Other transport equipment, Machinery and equipment manufacturing, Furniture and other manufacturing, Electricity, gas, water and waste services, Construction, Wholesale trade, Retail trade, Information, media and telecommunications, Property, professional and administrative services, Public administration and safety, Education and training, Health care and social assistance, Other services, Unallocated other	14.1
Incubator Support Programme	BO	Construction, Property, professional and administrative services, Public administration and safety, Education and training, Other services	3.4
Encouraging Innovation in Advanced Manufacturing	BO	Motor vehicle and parts	1.6
<b>Total</b>			<b>53.8</b>

<sup>a</sup> BO: budgetary outlay.

Source: Australian Government department and agency reports (various years) and departmental personal communications.

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## **Export and Regional Wine Support Package**

In August 2017, the Australian Government announced the introduction of the \$50 million Export and Regional Wine Support Package. The package is intended to help the Australian grape and wine industry by promoting the nation's wine tourism offerings and increasing demand for Australia's wine exports. Three grant programs are offered under the package including, wine export grants, international wine tourism state grants, and international wine tourism competitive grants. The package will be administered by Wine Australia (DAWR 2019b).

The value of Australian Government administered expenses for 2017-18 was \$17.3 million (WA 2018, p. 100).

This program is assessed as initially benefiting firms engaged in wine grape growing activities and has been allocated to the horticulture and fruit growing industry grouping.

## **Drought Concessional Loans Scheme (Administration)**

The Drought Concessional Loans Scheme forms part of the Australian Government's broader drought assistance measures and is intended to assist farm businesses experiencing financial difficulties as a result of the effects of drought. The Scheme provide loans of up to 50 per cent of eligible debt, up to a maximum of \$1 million, for debt restructuring, operating expenses and drought recovery and preparedness activities. The loans are intended to offer farm businesses some financial breathing space, by requiring interest-only payments over the five-year loan term (DAWR 2019a).

The value of Australian Government administered expenses for 2017-18 was \$2.1 million (DAWR 2018, p. 122).

The program is assessed as initially benefiting primary production activities. However, information on the specific industry incidence of the program has not been readily available. Accordingly, the budgetary outlay has been classified to the unallocated primary production industry grouping.

## **Drought Recovery Concessional Loans Scheme (Administration)**

The Drought Recovery Concessional Loans Scheme forms part of the Australian Government's broader drought assistance measures and is intended to assist farm businesses experiencing financial difficulties as a result of the effects of drought. The Scheme provides loans at a concessional interest rate for planting and/or restocking drought recovery activities as seasonal conditions allow. Loans of up to 50 per cent of eligible debt to a maximum of \$1 million are available for 10-year terms, with interest-only payments required for the first five years. The scheme recognises that parts of Australia are experiencing significant drought conditions and that it is beyond the ability of some otherwise viable farm businesses to

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manage the financial impacts. These loans are intended to help farm businesses return to full production when the drought breaks (DAWR 2019a).

The value of Australian Government administered expenses for 2017-18 was \$0.2 million (DAWR 2018, p. 122).

The program is assessed as initially benefiting primary production activities. However, information on the specific industry incidence of the program has not been readily available. Accordingly, the budgetary outlay has been classified to the unallocated primary production industry grouping.

### **Leadership in Agriculture Industries Fund**

The \$5 million Leadership in Agriculture Industries Fund is intended to provide support to national agricultural industry organisations to help develop leadership capability within agricultural industry representative bodies. The program aims to build farm leaders' skills so they can better represent their agricultural industry. Individual grants from the fund are expected to be between \$100 000 and \$500 000 (DAWR 2019c).

The value of Australian Government administered expenses for 2017-18 was \$3.8 million (DAWR 2018, p. 120).

The program is assessed as initially benefiting primary production activities. However, information on the specific industry incidence of the program has not been readily available. Accordingly, the budgetary outlay has been classified to the unallocated primary production industry grouping.

### **Murray-Darling Basin Regional Economic Diversification Program**

In November 2012, the Australian Government committed \$100 million to the Murray-Darling Basin Regional Economic Diversification Program (Crean 2012). The program is intended to assist communities in the Murray-Darling Basin living in a water-constrained environment to invest in programs to stimulate employment and regional growth. This program would normally have been included in an earlier edition of the *Trade and Assistance Review* but had been overlooked.

The value of Australian Government administered expenses for 2017-18 was \$5.1 million (Australian Government 2018, p. 30).

The program is assessed as initially benefiting primary production activities. However, information on the specific industry incidence of the program has not been readily available. Accordingly, the budgetary outlay has been classified to the unallocated primary production industry grouping.

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## **Advanced Manufacturing Growth Fund**

In May 2017, the Australian Government announced the introduction of the \$47.5 million Advanced Manufacturing Growth Fund. The program is intended to support capital projects by small and medium enterprises to establish and expand advanced manufacturing activities in Victoria and South Australia. The program aims to transition the manufacturing sector (from traditional, heavy industrial processes to knowledge-based manufacturing of higher value products) and improve the overall efficiency and competitiveness of firms and the broader economy. Individual grants range from \$0.5 million to \$2.5 million (DIIS 2019a).

The value of Australian Government administered expenses for 2017-18 was \$5.1 million (DIIS 2019, pers. comm., January 2019).

The Department of Industry, Innovation and Science (DIIS) provides data on government expenditure for the Advanced Manufacturing Growth Fund. This information has been used to allocate funding from the program to the Commission's ANZSIC-based industry groupings.

## **Encouraging Innovation in Advanced Manufacturing**

In May 2017, the Australian Government announced the introduction of the Encouraging Innovation in Advanced Manufacturing program. Funding from the program has been used to establish an automotive aftermarket product testing facility. It is intended that the testing facility will increase the capabilities of Australian businesses and aid in the development of new automotive aftermarket products for local and export markets (Australian Government 2019).

The value of Australian Government administered expenses for 2017-18 was \$1.6 million (DIIS 2019, pers. comm., January 2019).

This program is assessed as initially benefiting firms engaged in automotive product manufacturing and has been allocated to the motor vehicle and parts industry grouping.

## **Entrepreneurs' Programme — Innovation Connections and Incubator Support**

The Entrepreneurs' Programme is an Australian Government initiative intended to improve business competitiveness and productivity. It forms part of the Australian Government's National Innovation and Science Agenda. The program provides support to businesses through:

- Innovation Connections — provides businesses with access to a (highly skilled) facilitator, for the purpose of reviewing the business' research needs. The facilitator can connect the business to expertise within the research sector and help to define a project scope. Up to \$50 000 in matched funding support is available to the business, should it choose to fund the project with the recommendation of the facilitator (DIIS 2019b).

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- Incubator Support — provides grant funding to incubators to deliver support services to Australian start-ups with an international focus. Grants are available to support the establishment of new incubators in regions or sectors with high innovation potential, and for existing incubators looking to expand their services (DIIS 2019c).

The value of Australian Government administered expenses for 2017-18 was \$14.1 million and \$3.4 million, respectively (DIIS 2019, pers. comm., January 2019).

The Department of Industry, Innovation and Science (DIIS) provides data on government expenditure for the Entrepreneurs' Programme — Innovation Connections and Incubator Support. This information has been used to allocate funding from the program to the Commission's ANZSIC-based industry groupings.

### 3 Programs previously included in the estimates that had zero assistance in 2017-18

This chapter presents information on 16 programs which were included in the assistance estimates for 2016-17 (and earlier years where applicable), but which had zero assistance in 2017-18. Assistance provided by these programs amounted to \$66.5 million in 2016-17 (table 3.1).

**Table 3.1 Assistance programs in 2016-17 with zero assistance in 2017-18**

<i>Program</i>	<i>Form<sup>a</sup></i>	<i>Initial benefiting industry</i>	<i>Assistance value 2016-17</i>
			<i>\$m</i>
Caring for our country — Landcare	BO	Unallocated primary production	3.5
Carbon Farming Futures	BO	Horticulture and fruit growing; Sheep, beef cattle and grain farming; Other crop growing; Dairy cattle farming; Other livestock farming	12.0
Drought Assistance Package — concessional loans	BO	Horticulture and fruit growing; Sheep, beef cattle and grain farming; Other crop growing; Dairy cattle farming; Other livestock farming	2.1
Tax incentives for film investment	TE	Arts and recreation services	-6.0
Funding for major films — Pirates of the Caribbean: Dead Men tell No Tales	BO	Arts and recreation services	21.6
Regional Equalisation Plan	TE	Information, media and telecommunications	1.0
Indigenous Carbon Farming Fund	BO	Unallocated primary production	0.4
Asian Business Engagement Plan	BO	Unallocated other	0.2
National Low Emissions Coal Initiative	BO	Mining	2.6
Alcoa Portland Assistance	BO	Metal and fabricated metal products	30.0

(continued next page)

Table 3.1 (continued)

<i>Program</i>	<i>Form<sup>a</sup></i>	<i>Initial benefiting industry</i>	<i>Assistance value 2016-17</i>
			<i>\$m</i>
Manufacturing Transition Grants Programme	BO	Food, beverages and tobacco; Petroleum, coal, chemical and rubber products; Non-Metallic mineral products; Metal and fabricated metal products; Motor vehicle and parts; Machinery and equipment manufacturing; Furniture and other manufacturing; Property, professional and administrative services; Unallocated other	11.7
Clean Technology Investment — Food and Foundries Program	BO	Food, beverages and tobacco	0.1
Australian Government Innovation and Investment Fund — Tasmania	BO	Horticulture and fruit growing; Other crop growing; Other livestock farming; Aquaculture and fishing; Food, beverages and tobacco; Textile, leather, clothing and footwear; Wood and paper products; Non-Metallic mineral products; Metal and fabricated metal products; Wholesale trade; Accommodation and food services; Unallocated other	3.0
R&D tax offset payments — exemption	TE	Unallocated other	-25.0
Exploration Development Incentive	TE	Mining	13.3
Tax deductions for grape vines	TE	Horticulture and fruit growing	-4.0
<b>Total</b>			<b>66.5</b>

<sup>a</sup> BO: budgetary outlay. TE: tax expenditure.

Source: Commission estimates.

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## 4 Methodological changes to the estimates

For this year's *Review*, the Commission has changed the methodology for deriving estimates of tariff assistance to industry. This change in methodology has had a material impact on the Commission's tariff assistance estimates. The estimates have also been revised back to 2010-11, the beginning of the current series of assistance estimates.

### Methodology

The Commission's previous methodology used most favoured nation (MFN) tariff rates together with import values to impute duty and derive estimates of the price impacts of tariffs on both domestic and imported goods.<sup>1</sup> The main calculation process involved:

- using MFN tariff rates at the 8-digit tariff item level, as reported in schedule 3 of the Australian Customs Tariff, combined with ABS international merchandise trade import data to re-derive duty payments (called imputed duty)
- some concessions (schedule 4 of the Australian Customs Tariff) were taken into account (lowering the MFN rate) and excise tariffs were removed
- derived duty payments and import value estimates were then grouped into representative output goods and input goods based on treatment codes in schedule 4 and then aggregated to the ABS's input-output classification
- a tariff price wedge was derived (imputed duty payments divided by import values) which was then multiplied through ABS input-output data to derive an estimate of tariff assistance.

The main issue with this approach is tariff concessions afforded by Australia's PTA partner countries were not taken into account. The share of imports entering Australia with a level of preferential treatment has also been increasing over time, in part due to the larger number of trade agreements.

The Commission has revised its methodology for deriving estimates of tariff assistance. While similar to the previous methodology, the new approach uses actual duty payments (derived from the ABS import data) instead of MFN tariff rates. Actual duty payments fully reflect the uptake of concessions provided under Australia's preferential trade agreements

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<sup>1</sup> The Commission's previous tariff assistance methodology is discussed in more detail in the Methodological Annex to the *Trade and Assistance Review 2011-12* (PC 2014).

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and other tariff concessions. In line with the approach adopted in the previous methodology, excise payments are also removed from actual duty payments, the estimates are aggregated to the ABS input-output classification, and are combined with ABS input-output data to derive estimates of tariff assistance.

### **Comparing results from the previous and new approaches to estimating tariff assistance**

Under the new methodology, the estimated value of output tariff assistance to the manufacturing sector, the main beneficiary of tariff assistance, has fallen by more than half, while for the services sector, the main sector penalised by the tariff, the input tariff penalty has also fallen by more than half. Across all industries net tariff assistance is about \$500 million lower under the new methodology. The effective rate of assistance, which also includes budgetary assistance, has also declined significantly for some industries.

Tables 4.1 to 4.3, present output tariff assistance estimates according to the new methodology (table 4.1), previous methodology (table 4.2), and the absolute difference between the methods (table 4.3).

Tables 4.4 to 4.6, present input tariff assistance estimates according to the new methodology (table 4.4), previous methodology (table 4.5), and the absolute difference between the methods (table 4.6).

Tables 4.7 to 4.9, present net tariff assistance estimates according to the new methodology (table 4.7), previous methodology (table 4.8), and the absolute difference between the methods (table 4.9).

Tables 4.10 to 4.12, present estimates of effective rates of assistance according to the new methodology (table 4.10), previous methodology (table 4.11), and the absolute difference between the methods (table 4.12).

**Table 4.1 Output tariff assistance (new methodology) by industry grouping, 2013-14 to 2017-18**  
\$ million (nominal)

<i>Industry grouping</i>	<i>2013-14</i>	<i>2014-15</i>	<i>2015-16</i>	<i>2016-17</i>	<i>2017-18</i>
<b>Primary production</b>	<b>223.0</b>	<b>262.9</b>	<b>310.3</b>	<b>418.2</b>	<b>431.8</b>
Horticulture and fruit growing	42.6	40.5	40.4	42.4	37.7
Sheep, beef cattle and grain farming	173.5	216.9	262.3	365.3	384.5
Other crop growing	0.5	0.5	0.4	0.6	0.7
Dairy cattle farming	–	–	–	–	–
Other livestock farming	–	–	–	–	–
Aquaculture and fishing	0.7	1.2	0.7	0.5	0.4
Forestry and logging	0.5	1.4	0.8	0.4	0.2
Primary production support services	5.1	2.5	5.6	9.0	8.1
Unallocated primary production	–	–	–	–	–
<b>Mining</b>	<b>1.2</b>	<b>0.9</b>	<b>0.6</b>	<b>1.3</b>	<b>1.1</b>
<b>Manufacturing</b>	<b>3 171.2</b>	<b>3 043.4</b>	<b>2 647.0</b>	<b>1 954.1</b>	<b>1 889.2</b>
Food, beverages and tobacco	563.2	560.3	556.6	531.1	620.0
Textiles, leather, clothing and footwear	120.9	106.9	72.4	42.1	35.1
Wood and paper products	310.3	336.3	278.3	142.2	160.5
Printing and recorded media	81.2	85.5	65.1	38.3	38.9
Petroleum, coal, chemical and rubber prod.	372.4	357.3	325.1	216.4	205.5
Non-metallic mineral products	161.0	185.0	152.9	83.8	78.1
Metal and fabricated metal products	636.4	586.3	529.7	332.2	259.9
Motor vehicles and parts	407.5	279.0	232.6	207.4	190.7
Other transport equipment	151.2	204.2	165.1	174.2	122.1
Machinery and equipment manufacturing	204.3	181.8	141.5	126.1	121.9
Furniture and other manufacturing	162.8	160.9	127.8	60.3	56.7
Unallocated manufacturing	–	–	–	–	–
<b>Services</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>
Electricity, gas, water and waste services	–	–	–	–	–
Construction	–	–	–	–	–
Wholesale trade	–	–	–	–	–
Retail trade	–	–	–	–	–
Accommodation and food services	–	–	–	–	–
Transport, postal and warehousing	–	–	–	–	–
Information, media and telecommunications	–	–	–	–	–
Financial and insurance services	–	–	–	–	–
Property, professional and admin. services	–	–	–	–	–
Public administration and safety	–	–	–	–	–
Education and training	–	–	–	–	–
Health care and social assistance	–	–	–	–	–
Arts and recreation services	–	–	–	–	–
Other services	–	–	–	–	–
Unallocated services	–	–	–	–	–
<b>Unallocated other</b>	<b>–</b>	<b>–</b>	<b>–</b>	<b>–</b>	<b>–</b>
<b>Total</b>	<b>3 395.4</b>	<b>3 307.3</b>	<b>2 957.9</b>	<b>2 373.7</b>	<b>2 322.1</b>

– Nil. Source: Commission estimates.

**Table 4.2 Output tariff assistance (previous methodology) by industry grouping, 2013-14 to 2017-18**  
\$ million (nominal)

<i>Industry grouping</i>	<i>2013-14</i>	<i>2014-15</i>	<i>2015-16</i>	<i>2016-17</i>	<i>2017-18</i>
<b>Primary production</b>	<b>363.4</b>	<b>397.1</b>	<b>398.2</b>	<b>469.7</b>	<b>452.7</b>
Horticulture and fruit growing	109.8	118.7	128.7	147.0	136.1
Sheep, beef cattle and grain farming	216.1	241.3	225.0	269.3	261.2
Other crop growing	1.3	1.4	1.4	2.1	2.7
Dairy cattle farming	–	–	–	–	–
Other livestock farming	–	–	–	–	–
Aquaculture and fishing	1.7	2.2	2.5	3.0	2.9
Forestry and logging	14.5	15.7	17.8	20.8	22.2
Primary production support services	20.0	17.8	22.8	27.5	27.5
Unallocated primary production	–	–	–	–	–
<b>Mining</b>	<b>1.4</b>	<b>1.5</b>	<b>1.6</b>	<b>1.6</b>	<b>1.6</b>
<b>Manufacturing</b>	<b>6 356.1</b>	<b>6 395.3</b>	<b>6 537.6</b>	<b>6 597.7</b>	<b>6 907.8</b>
Food, beverages and tobacco	2 011.1	2 012.9	2 015.8	2 037.6	2 216.9
Textiles, leather, clothing and footwear	145.7	133.0	109.3	109.3	118.0
Wood and paper products	653.4	686.6	741.0	740.7	799.9
Printing and recorded media	106.2	111.2	104.7	104.6	113.0
Petroleum, coal, chemical and rubber prod.	648.7	624.9	671.0	676.6	697.1
Non-metallic mineral products	310.4	325.2	311.3	311.2	336.1
Metal and fabricated metal products	1 073.3	1 090.9	1 109.3	1 115.5	1 143.4
Motor vehicles and parts	561.7	509.6	602.6	613.6	606.0
Other transport equipment	182.7	250.4	254.2	258.9	255.7
Machinery and equipment manufacturing	444.5	421.2	372.9	379.7	374.8
Furniture and other manufacturing	218.6	229.5	245.5	250.0	246.9
Unallocated manufacturing	–	–	–	–	–
<b>Services</b>	<b>–</b>	<b>–</b>	<b>–</b>	<b>–</b>	<b>–</b>
Electricity, gas, water and waste services	–	–	–	–	–
Construction	–	–	–	–	–
Wholesale trade	–	–	–	–	–
Retail trade	–	–	–	–	–
Accommodation and food services	–	–	–	–	–
Transport, postal and warehousing	–	–	–	–	–
Information, media and telecommunications	–	–	–	–	–
Financial and insurance services	–	–	–	–	–
Property, professional and admin. services	–	–	–	–	–
Public administration and safety	–	–	–	–	–
Education and training	–	–	–	–	–
Health care and social assistance	–	–	–	–	–
Arts and recreation services	–	–	–	–	–
Other services	–	–	–	–	–
Unallocated services	–	–	–	–	–
<b>Unallocated other</b>	<b>–</b>	<b>–</b>	<b>–</b>	<b>–</b>	<b>–</b>
<b>Total</b>	<b>6 720.9</b>	<b>6 793.9</b>	<b>6 937.4</b>	<b>7 068.9</b>	<b>7 362.1</b>

– Nil. *Source:* Commission estimates.

**Table 4.3 Output tariff assistance (absolute difference in methodologies), 2013-14 to 2017-18**  
\$ million (nominal)

<i>Industry grouping</i>	<i>2013-14</i>	<i>2014-15</i>	<i>2015-16</i>	<i>2016-17</i>	<i>2017-18</i>
<b>Primary production</b>	<b>-140.4</b>	<b>-159.9</b>	<b>-105.4</b>	<b>-51.4</b>	<b>-21.0</b>
Horticulture and fruit growing	-67.3	-78.3	-88.2	-104.6	-98.4
Sheep, beef cattle and grain farming	-42.5	-24.4	37.2	96.0	123.2
Other crop growing	-0.8	-0.9	-1.0	-1.5	-1.9
Dairy cattle farming	–	–	–	–	–
Other livestock farming	–	–	–	–	–
Aquaculture and fishing	-0.9	-1.0	-1.8	-2.5	-2.5
Forestry and logging	-14.0	-14.3	-17.0	-20.4	-22.0
Primary production support services	-14.9	-15.2	-17.2	-18.5	-19.4
Unallocated primary production	–	–	–	–	–
<b>Mining</b>	<b>-0.2</b>	<b>-0.6</b>	<b>-1.0</b>	<b>-0.3</b>	<b>-0.5</b>
<b>Manufacturing</b>	<b>-3 184.9</b>	<b>-3 407.0</b>	<b>-4 005.5</b>	<b>-4 643.6</b>	<b>-5 018.6</b>
Food, beverages and tobacco	-1 447.9	-1 452.6	-1 459.3	-1 506.4	-1 596.9
Textiles, leather, clothing and footwear	-24.7	-26.0	-37.0	-67.2	-83.0
Wood and paper products	-343.1	-350.3	-462.7	-598.4	-639.4
Printing and recorded media	-24.9	-25.7	-39.6	-66.4	-74.1
Petroleum, coal, chemical and rubber prod.	-276.3	-267.6	-345.9	-460.2	-491.6
Non-metallic mineral products	-149.4	-140.2	-158.5	-227.4	-258.0
Metal and fabricated metal products	-436.8	-504.7	-579.7	-783.2	-883.5
Motor vehicles and parts	-154.3	-230.6	-370.0	-406.2	-415.3
Other transport equipment	-31.5	-46.2	-89.1	-84.8	-133.6
Machinery and equipment manufacturing	-240.2	-239.4	-231.4	-253.6	-252.9
Furniture and other manufacturing	-55.8	-68.6	-117.6	-189.7	-190.1
Unallocated manufacturing	–	–	–	–	–
<b>Services</b>	<b>–</b>	<b>–</b>	<b>–</b>	<b>–</b>	<b>–</b>
Electricity, gas, water and waste services	–	–	–	–	–
Construction	–	–	–	–	–
Wholesale trade	–	–	–	–	–
Retail trade	–	–	–	–	–
Accommodation and food services	–	–	–	–	–
Transport, postal and warehousing	–	–	–	–	–
Information, media and telecommunications	–	–	–	–	–
Financial and insurance services	–	–	–	–	–
Property, professional and admin. services	–	–	–	–	–
Public administration and safety	–	–	–	–	–
Education and training	–	–	–	–	–
Health care and social assistance	–	–	–	–	–
Arts and recreation services	–	–	–	–	–
Other services	–	–	–	–	–
Unallocated services	–	–	–	–	–
<b>Unallocated other</b>	<b>–</b>	<b>–</b>	<b>–</b>	<b>–</b>	<b>–</b>
<b>Total</b>	<b>-3 325.5</b>	<b>-3 486.6</b>	<b>-3 979.6</b>	<b>-4 695.3</b>	<b>-5 040.1</b>

– Nil. *Source:* Commission estimates.

**Table 4.4 Input tariff assistance (new methodology) by industry grouping, 2013-14 to 2017-18**  
\$ million (nominal)

<i>Industry grouping</i>	<i>2013-14</i>	<i>2014-15</i>	<i>2015-16</i>	<i>2016-17</i>	<i>2017-18</i>
<b>Primary production</b>	<b>-65.9</b>	<b>-67.5</b>	<b>-70.9</b>	<b>-79.9</b>	<b>-76.0</b>
Horticulture and fruit growing	-3.6	-3.3	-3.4	-3.8	-3.4
Sheep, beef cattle and grain farming	-26.5	-29.3	-30.7	-38.4	-38.6
Other crop growing	-2.2	-2.0	-2.0	-2.8	-3.2
Dairy cattle farming	-5.5	-6.1	-6.0	-6.0	-4.8
Other livestock farming	-4.9	-6.2	-6.7	-7.0	-6.5
Aquaculture and fishing	-4.0	-4.9	-4.8	-4.6	-3.5
Forestry and logging	-0.2	-0.2	-0.2	-0.2	-0.2
Primary production support services	-18.9	-15.4	-17.2	-17.1	-15.7
Unallocated primary production	–	–	–	–	–
<b>Mining</b>	<b>-166.3</b>	<b>-165.7</b>	<b>-149.2</b>	<b>-116.2</b>	<b>-103.2</b>
<b>Manufacturing</b>	<b>-890.6</b>	<b>-863.1</b>	<b>-807.0</b>	<b>-683.5</b>	<b>-720.2</b>
Food, beverages and tobacco	-332.7	-345.0	-368.9	-368.0	-427.2
Textiles, leather, clothing and footwear	-26.1	-24.4	-19.7	-15.3	-15.7
Wood and paper products	-37.4	-41.7	-36.6	-24.0	-28.0
Printing and recorded media	-16.3	-16.5	-12.4	-7.5	-7.5
Petroleum, coal, chemical and rubber prod.	-74.8	-68.3	-54.6	-37.0	-36.0
Non-metallic mineral products	-31.8	-31.8	-26.7	-18.7	-16.1
Metal and fabricated metal products	-99.2	-97.4	-87.4	-58.0	-50.9
Motor vehicles and parts	-153.1	-111.6	-97.3	-80.4	-72.9
Other transport equipment	-29.9	-41.1	-35.8	-26.8	-22.1
Machinery and equipment manufacturing	-62.5	-57.7	-43.9	-31.8	-28.0
Furniture and other manufacturing	-26.7	-27.6	-23.8	-15.9	-15.8
Unallocated manufacturing	–	–	–	–	–
<b>Services</b>	<b>-2 082.3</b>	<b>-2 006.6</b>	<b>-1 663.6</b>	<b>-1 217.9</b>	<b>-1 158.4</b>
Electricity, gas, water and waste services	-42.3	-40.4	-32.7	-24.6	-23.3
Construction	-808.5	-824.2	-681.6	-448.4	-417.1
Wholesale trade	-140.0	-128.1	-106.3	-77.0	-72.4
Retail trade	-75.3	-70.8	-61.1	-46.3	-46.1
Accommodation and food services	-96.8	-99.0	-97.7	-88.4	-95.3
Transport, postal and warehousing	-137.7	-121.4	-93.9	-85.1	-78.6
Information, media and telecommunications	-45.0	-43.8	-35.3	-22.4	-20.5
Financial and insurance services	-8.9	-9.4	-8.2	-5.6	-5.7
Property, professional and admin. services	-207.0	-204.2	-174.0	-132.7	-129.1
Public administration and safety	-91.7	-84.8	-71.9	-50.6	-43.8
Education and training	-27.2	-26.6	-22.9	-16.7	-16.3
Health care and social assistance	-134.8	-122.0	-95.9	-68.8	-62.8
Arts and recreation services	-39.3	-39.4	-35.3	-27.1	-27.9
Other services	-227.8	-192.5	-146.8	-124.1	-119.6
Unallocated services	–	–	–	–	–
<b>Unallocated other</b>	<b>–</b>	<b>–</b>	<b>–</b>	<b>–</b>	<b>–</b>
<b>Total</b>	<b>-3 205.0</b>	<b>-3 102.9</b>	<b>-2 690.7</b>	<b>-2 097.5</b>	<b>-2 057.7</b>

– Nil. *Source:* Commission estimates.

**Table 4.5 Input tariff assistance (previous methodology) by industry grouping, 2013-14 to 2017-18**  
\$ million (nominal)

<i>Industry grouping</i>	<i>2013-14</i>	<i>2014-15</i>	<i>2015-16</i>	<i>2016-17</i>	<i>2017-18</i>
<b>Primary production</b>	<b>-151.7</b>	<b>-160.6</b>	<b>-165.1</b>	<b>-195.4</b>	<b>-190.7</b>
Horticulture and fruit growing	-8.7	-9.3	-9.8	-11.7	-11.5
Sheep, beef cattle and grain farming	-61.6	-68.5	-63.7	-76.2	-73.9
Other crop growing	-5.3	-5.7	-5.6	-8.6	-10.7
Dairy cattle farming	-12.9	-14.3	-12.4	-11.8	-9.2
Other livestock farming	-13.7	-17.0	-17.7	-19.9	-18.1
Aquaculture and fishing	-7.7	-9.0	-10.0	-11.7	-11.7
Forestry and logging	-1.6	-1.8	-2.0	-2.3	-2.5
Primary production support services	-40.2	-35.0	-44.0	-53.1	-53.2
Unallocated primary production	-	-	-	-	-
<b>Mining</b>	<b>-285.9</b>	<b>-297.9</b>	<b>-305.9</b>	<b>-310.2</b>	<b>-319.1</b>
<b>Manufacturing</b>	<b>-1 686.3</b>	<b>-1 674.1</b>	<b>-1 688.4</b>	<b>-1 706.2</b>	<b>-1 789.9</b>
Food, beverages and tobacco	-698.7	-701.3	-702.8	-710.4	-772.9
Textiles, leather, clothing and footwear	-34.3	-32.8	-28.7	-28.7	-31.0
Wood and paper products	-111.1	-116.3	-124.6	-124.6	-134.5
Printing and recorded media	-29.5	-30.5	-28.3	-28.3	-30.5
Petroleum, coal, chemical and rubber prod.	-142.1	-133.4	-128.0	-129.1	-133.0
Non-metallic mineral products	-53.1	-55.2	-52.4	-52.4	-56.6
Metal and fabricated metal products	-183.1	-178.7	-173.2	-174.1	-178.5
Motor vehicles and parts	-218.0	-197.0	-232.1	-236.4	-233.5
Other transport equipment	-51.6	-69.8	-69.8	-71.1	-70.2
Machinery and equipment manufacturing	-112.9	-105.9	-92.8	-94.5	-93.3
Furniture and other manufacturing	-52.0	-53.2	-55.5	-56.6	-55.9
Unallocated manufacturing	-	-	-	-	-
<b>Services</b>	<b>-3 712.8</b>	<b>-3 735.9</b>	<b>-3 716.8</b>	<b>-3 833.6</b>	<b>-3 977.1</b>
Electricity, gas, water and waste services	-73.3	-70.1	-68.1	-72.8	-76.6
Construction	-1 480.0	-1 500.3	-1 485.6	-1 512.4	-1 570.0
Wholesale trade	-236.2	-227.7	-225.7	-235.6	-241.2
Retail trade	-141.8	-140.0	-140.3	-144.8	-152.3
Accommodation and food services	-279.8	-292.2	-302.8	-309.9	-318.5
Transport, postal and warehousing	-197.3	-202.1	-204.1	-211.8	-216.7
Information, media and telecommunications	-73.4	-72.9	-71.4	-71.4	-71.0
Financial and insurance services	-13.8	-14.8	-15.5	-16.1	-17.2
Property, professional and admin. services	-365.2	-372.2	-374.9	-399.0	-419.5
Public administration and safety	-145.3	-140.8	-143.5	-145.5	-145.2
Education and training	-47.9	-48.6	-49.3	-50.9	-53.6
Health care and social assistance	-232.0	-228.7	-217.1	-229.1	-244.9
Arts and recreation services	-72.9	-74.1	-75.0	-76.4	-78.9
Other services	-353.9	-351.6	-343.6	-357.9	-371.4
Unallocated services	-	-	-	-	-
<b>Unallocated other</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Total</b>	<b>-5 836.6</b>	<b>-5 868.6</b>	<b>-5 876.2</b>	<b>-6 045.3</b>	<b>-6 276.8</b>

- Nil. Source: Commission estimates.

**Table 4.6 Input tariff assistance (absolute difference in methodologies), 2013-14 to 2017-18**  
\$ million (nominal)

<i>Industry grouping</i>	<i>2013-14</i>	<i>2014-15</i>	<i>2015-16</i>	<i>2016-17</i>	<i>2017-18</i>
<b>Primary production</b>	<b>-85.8</b>	<b>-97.5</b>	<b>-100.9</b>	<b>-115.5</b>	<b>-114.8</b>
Horticulture and fruit growing	-5.1	-6.0	-6.4	-8.0	-8.0
Sheep, beef cattle and grain farming	-35.1	-39.2	-32.9	-37.8	-35.3
Other crop growing	-3.1	-3.6	-3.6	-5.8	-7.5
Dairy cattle farming	-7.3	-8.2	-6.4	-5.9	-4.4
Other livestock farming	-8.8	-10.9	-11.0	-12.9	-11.6
Aquaculture and fishing	-3.6	-4.1	-5.2	-7.1	-8.2
Forestry and logging	-1.5	-1.6	-1.8	-2.1	-2.3
Primary production support services	-21.2	-19.6	-26.8	-36.0	-37.5
Unallocated primary production	–	–	–	–	–
<b>Mining</b>	<b>-119.5</b>	<b>-143.8</b>	<b>-175.2</b>	<b>-194.0</b>	<b>-215.9</b>
<b>Manufacturing</b>	<b>-795.8</b>	<b>-811.9</b>	<b>-895.6</b>	<b>-1 022.7</b>	<b>-1 069.7</b>
Food, beverages and tobacco	-365.9	-356.2	-333.9	-342.4	-345.7
Textiles, leather, clothing and footwear	-8.2	-8.4	-9.1	-13.4	-15.3
Wood and paper products	-73.6	-74.6	-88.1	-100.6	-106.6
Printing and recorded media	-13.2	-13.9	-15.8	-20.7	-23.0
Petroleum, coal, chemical and rubber prod.	-67.3	-65.1	-73.5	-92.1	-97.0
Non-metallic mineral products	-21.4	-23.4	-25.7	-33.7	-40.5
Metal and fabricated metal products	-83.9	-81.4	-85.8	-116.1	-127.6
Motor vehicles and parts	-64.8	-85.5	-134.8	-156.1	-160.6
Other transport equipment	-21.7	-28.7	-34.0	-44.4	-48.1
Machinery and equipment manufacturing	-50.4	-48.2	-48.9	-62.7	-65.2
Furniture and other manufacturing	-25.3	-25.6	-31.8	-40.6	-40.1
Unallocated manufacturing	–	–	–	–	–
<b>Services</b>	<b>-1 630.5</b>	<b>-1 778.5</b>	<b>-2 117.4</b>	<b>-2 615.7</b>	<b>-2 818.6</b>
Electricity, gas, water and waste services	-31.0	-29.7	-35.4	-48.2	-53.3
Construction	-671.5	-676.1	-804.0	-1 063.9	-1 152.9
Wholesale trade	-96.1	-99.6	-119.4	-158.6	-168.9
Retail trade	-66.5	-69.2	-79.2	-98.4	-106.2
Accommodation and food services	-183.0	-193.1	-205.1	-221.5	-223.2
Transport, postal and warehousing	-59.6	-80.7	-110.1	-126.7	-138.1
Information, media and telecommunications	-28.3	-29.0	-36.2	-49.0	-50.5
Financial and insurance services	-5.0	-5.3	-7.3	-10.6	-11.5
Property, professional and admin. services	-158.2	-168.0	-200.9	-266.3	-290.4
Public administration and safety	-53.6	-56.0	-71.6	-94.9	-101.5
Education and training	-20.7	-22.0	-26.4	-34.3	-37.2
Health care and social assistance	-97.2	-106.7	-121.2	-160.3	-182.1
Arts and recreation services	-33.6	-34.7	-39.7	-49.3	-51.0
Other services	-126.1	-159.1	-196.8	-233.8	-251.7
Unallocated services	–	–	–	–	–
<b>Unallocated other</b>	<b>–</b>	<b>–</b>	<b>–</b>	<b>–</b>	<b>–</b>
<b>Total</b>	<b>-2 631.6</b>	<b>-2 765.7</b>	<b>-3 185.5</b>	<b>-3 947.9</b>	<b>-4 219.1</b>

– Nil. Source: Commission estimates.

**Table 4.7 Net tariff assistance (new methodology) by industry grouping, 2013-14 to 2017-18**  
\$ million (nominal)

<i>Industry grouping</i>	<i>2013-14</i>	<i>2014-15</i>	<i>2015-16</i>	<i>2016-17</i>	<i>2017-18</i>
<b>Primary production</b>	<b>157.1</b>	<b>195.5</b>	<b>239.3</b>	<b>338.4</b>	<b>355.8</b>
Horticulture and fruit growing	39.0	37.2	37.0	38.6	34.3
Sheep, beef cattle and grain farming	147.0	187.5	231.6	326.9	345.9
Other crop growing	-1.7	-1.5	-1.5	-2.1	-2.4
Dairy cattle farming	-5.5	-6.1	-6.0	-6.0	-4.8
Other livestock farming	-4.9	-6.2	-6.7	-7.0	-6.5
Aquaculture and fishing	-3.3	-3.7	-4.1	-4.1	-3.0
Forestry and logging	0.4	1.2	0.6	0.2	0.0
Primary production support services	-13.8	-12.9	-11.6	-8.1	-7.6
Unallocated primary production	–	–	–	–	–
<b>Mining</b>	<b>-165.2</b>	<b>-164.8</b>	<b>-148.5</b>	<b>-114.9</b>	<b>-102.1</b>
<b>Manufacturing</b>	<b>2 280.7</b>	<b>2 180.4</b>	<b>1 839.9</b>	<b>1 270.6</b>	<b>1 169.0</b>
Food, beverages and tobacco	230.5	215.3	187.7	163.2	192.8
Textiles, leather, clothing and footwear	94.8	82.5	52.7	26.7	19.3
Wood and paper products	272.9	294.7	241.7	118.2	132.5
Printing and recorded media	64.9	68.9	52.7	30.7	31.3
Petroleum, coal, chemical and rubber prod.	297.6	289.0	270.5	179.4	169.5
Non-metallic mineral products	129.2	153.1	126.2	65.0	62.0
Metal and fabricated metal products	537.2	488.9	442.3	274.2	209.0
Motor vehicles and parts	254.3	167.4	135.2	127.1	117.9
Other transport equipment	121.3	163.1	129.3	147.4	100.0
Machinery and equipment manufacturing	141.8	124.1	97.6	94.3	93.9
Furniture and other manufacturing	136.1	133.3	104.0	44.3	41.0
Unallocated manufacturing	–	–	–	–	–
<b>Services</b>	<b>-2 082.3</b>	<b>-2 006.6</b>	<b>-1 663.6</b>	<b>-1 217.9</b>	<b>-1 158.4</b>
Electricity, gas, water and waste services	-42.3	-40.4	-32.7	-24.6	-23.3
Construction	-808.5	-824.2	-681.6	-448.4	-417.1
Wholesale trade	-140.0	-128.1	-106.3	-77.0	-72.4
Retail trade	-75.3	-70.8	-61.1	-46.3	-46.1
Accommodation and food services	-96.8	-99.0	-97.7	-88.4	-95.3
Transport, postal and warehousing	-137.7	-121.4	-93.9	-85.1	-78.6
Information, media and telecommunications	-45.0	-43.8	-35.3	-22.4	-20.5
Financial and insurance services	-8.9	-9.4	-8.2	-5.6	-5.7
Property, professional and admin. services	-207.0	-204.2	-174.0	-132.7	-129.1
Public administration and safety	-91.7	-84.8	-71.9	-50.6	-43.8
Education and training	-27.2	-26.6	-22.9	-16.7	-16.3
Health care and social assistance	-134.8	-122.0	-95.9	-68.8	-62.8
Arts and recreation services	-39.3	-39.4	-35.3	-27.1	-27.9
Other services	-227.8	-192.5	-146.8	-124.1	-119.6
Unallocated services	–	–	–	–	–
<b>Unallocated other</b>	<b>–</b>	<b>–</b>	<b>–</b>	<b>–</b>	<b>–</b>
<b>Total</b>	<b>190.3</b>	<b>204.4</b>	<b>267.2</b>	<b>276.2</b>	<b>264.3</b>

– Nil. *Source:* Commission estimates.

**Table 4.8 Net tariff assistance (previous methodology) by industry grouping, 2013-14 to 2017-18**  
\$ million (nominal)

<i>Industry grouping</i>	<i>2013-14</i>	<i>2014-15</i>	<i>2015-16</i>	<i>2016-17</i>	<i>2017-18</i>
<b>Primary production</b>	<b>211.7</b>	<b>236.4</b>	<b>233.1</b>	<b>274.3</b>	<b>262.0</b>
Horticulture and fruit growing	101.1	109.5	118.9	135.2	124.6
Sheep, beef cattle and grain farming	154.5	172.8	161.4	193.1	187.3
Other crop growing	-4.0	-4.3	-4.2	-6.4	-8.0
Dairy cattle farming	-12.9	-14.3	-12.4	-11.8	-9.2
Other livestock farming	-13.7	-17.0	-17.7	-19.9	-18.1
Aquaculture and fishing	-6.0	-6.8	-7.5	-8.7	-8.7
Forestry and logging	12.9	13.9	15.8	18.5	19.7
Primary production support services	-20.2	-17.3	-21.2	-25.6	-25.7
Unallocated primary production	–	–	–	–	–
<b>Mining</b>	<b>-284.5</b>	<b>-296.4</b>	<b>-304.4</b>	<b>-308.6</b>	<b>-317.5</b>
<b>Manufacturing</b>	<b>4 669.8</b>	<b>4 721.2</b>	<b>4 849.3</b>	<b>4 891.5</b>	<b>5 117.9</b>
Food, beverages and tobacco	1 312.4	1 311.6	1 313.1	1 327.2	1 444.0
Textiles, leather, clothing and footwear	111.4	100.1	80.6	80.6	87.0
Wood and paper products	542.3	570.3	616.4	616.1	665.3
Printing and recorded media	76.7	80.7	76.4	76.4	82.5
Petroleum, coal, chemical and rubber prod.	506.6	491.6	542.9	547.5	564.1
Non-metallic mineral products	257.3	270.0	258.9	258.8	279.5
Metal and fabricated metal products	890.2	912.2	936.2	941.3	964.9
Motor vehicles and parts	343.8	312.6	370.4	377.2	372.6
Other transport equipment	131.1	180.7	184.4	187.8	185.5
Machinery and equipment manufacturing	331.5	315.3	280.1	285.2	281.5
Furniture and other manufacturing	166.6	176.2	189.9	193.4	191.0
Unallocated manufacturing	–	–	–	–	–
<b>Services</b>	<b>-3 712.8</b>	<b>-3 735.9</b>	<b>-3 716.8</b>	<b>-3 833.6</b>	<b>-3 977.1</b>
Electricity, gas, water and waste services	-73.3	-70.1	-68.1	-72.8	-76.6
Construction	-1 480.0	-1 500.3	-1 485.6	-1 512.4	-1 570.0
Wholesale trade	-236.2	-227.7	-225.7	-235.6	-241.2
Retail trade	-141.8	-140.0	-140.3	-144.8	-152.3
Accommodation and food services	-279.8	-292.2	-302.8	-309.9	-318.5
Transport, postal and warehousing	-197.3	-202.1	-204.1	-211.8	-216.7
Information, media and telecommunications	-73.4	-72.9	-71.4	-71.4	-71.0
Financial and insurance services	-13.8	-14.8	-15.5	-16.1	-17.2
Property, professional and admin. services	-365.2	-372.2	-374.9	-399.0	-419.5
Public administration and safety	-145.3	-140.8	-143.5	-145.5	-145.2
Education and training	-47.9	-48.6	-49.3	-50.9	-53.6
Health care and social assistance	-232.0	-228.7	-217.1	-229.1	-244.9
Arts and recreation services	-72.9	-74.1	-75.0	-76.4	-78.9
Other services	-353.9	-351.6	-343.6	-357.9	-371.4
Unallocated services	–	–	–	–	–
<b>Unallocated other</b>	<b>–</b>	<b>–</b>	<b>–</b>	<b>–</b>	<b>–</b>
<b>Total</b>	<b>884.2</b>	<b>925.3</b>	<b>1 061.2</b>	<b>1 023.6</b>	<b>1 085.3</b>

– Nil. *Source:* Commission estimates.

**Table 4.9 Net tariff assistance (absolute difference in methodologies), 2013-14 to 2017-18**  
\$ million (nominal)

<i>Industry grouping</i>	<i>2013-14</i>	<i>2014-15</i>	<i>2015-16</i>	<i>2016-17</i>	<i>2017-18</i>
<b>Primary production</b>	<b>-54.6</b>	<b>-62.4</b>	<b>-4.5</b>	<b>64.0</b>	<b>93.8</b>
Horticulture and fruit growing	-62.2	-72.3	-81.8	-96.6	-90.3
Sheep, beef cattle and grain farming	-7.5	14.8	70.2	133.7	158.5
Other crop growing	2.3	2.7	2.7	4.3	5.6
Dairy cattle farming	7.3	8.2	6.4	5.9	4.4
Other livestock farming	8.8	10.9	11.0	12.9	11.6
Aquaculture and fishing	2.7	3.1	3.4	4.6	5.7
Forestry and logging	-12.5	-12.7	-15.2	-18.3	-19.7
Primary production support services	6.4	4.4	9.7	17.5	18.1
Unallocated primary production	–	–	–	–	–
<b>Mining</b>	<b>119.3</b>	<b>143.2</b>	<b>174.2</b>	<b>193.7</b>	<b>215.4</b>
<b>Manufacturing</b>	<b>-2 389.1</b>	<b>-2 595.1</b>	<b>-3 110.0</b>	<b>-3 620.9</b>	<b>-3 948.8</b>
Food, beverages and tobacco	-1 082.0	-1 096.3	-1 125.3	-1 164.0	-1 251.2
Textiles, leather, clothing and footwear	-16.5	-17.6	-27.9	-53.8	-67.7
Wood and paper products	-269.5	-275.6	-374.6	-497.9	-532.8
Printing and recorded media	-11.7	-11.8	-23.7	-45.6	-51.1
Petroleum, coal, chemical and rubber prod.	-209.0	-202.5	-272.4	-368.1	-394.6
Non-metallic mineral products	-128.1	-116.8	-132.7	-193.8	-217.5
Metal and fabricated metal products	-353.0	-423.3	-493.9	-667.1	-755.9
Motor vehicles and parts	-89.4	-145.1	-235.2	-250.1	-254.7
Other transport equipment	-9.8	-17.6	-55.1	-40.4	-85.5
Machinery and equipment manufacturing	-189.8	-191.2	-182.5	-190.9	-187.7
Furniture and other manufacturing	-30.5	-42.9	-85.9	-149.1	-150.0
Unallocated manufacturing	–	–	–	–	–
<b>Services</b>	<b>1 630.5</b>	<b>1 778.5</b>	<b>2 117.4</b>	<b>2 615.7</b>	<b>2 818.6</b>
Electricity, gas, water and waste services	31.0	29.7	35.4	48.2	53.3
Construction	671.5	676.1	804.0	1 063.9	1 152.9
Wholesale trade	96.1	99.6	119.4	158.6	168.9
Retail trade	66.5	69.2	79.2	98.4	106.2
Accommodation and food services	183.0	193.1	205.1	221.5	223.2
Transport, postal and warehousing	59.6	80.7	110.1	126.7	138.1
Information, media and telecommunications	28.3	29.0	36.2	49.0	50.5
Financial and insurance services	5.0	5.3	7.3	10.6	11.5
Property, professional and admin. services	158.2	168.0	200.9	266.3	290.4
Public administration and safety	53.6	56.0	71.6	94.9	101.5
Education and training	20.7	22.0	26.4	34.3	37.2
Health care and social assistance	97.2	106.7	121.2	160.3	182.1
Arts and recreation services	33.6	34.7	39.7	49.3	51.0
Other services	126.1	159.1	196.8	233.8	251.7
Unallocated services	–	–	–	–	–
<b>Unallocated other</b>	<b>–</b>	<b>–</b>	<b>–</b>	<b>–</b>	<b>–</b>
<b>Total</b>	<b>-693.9</b>	<b>-720.9</b>	<b>-794.1</b>	<b>-747.4</b>	<b>-821.0</b>

– Nil. *Source:* Commission estimates.

**Table 4.10 Effective Rates of Assistance (new methodology) by industry grouping, 2013-14 to 2017-18**  
per cent

<i>Industry grouping</i>	<i>2013-14</i>	<i>2014-15</i>	<i>2015-16</i>	<i>2016-17</i>	<i>2017-18</i>
<b>Primary production</b>	<b>3.0</b>	<b>2.9</b>	<b>2.9</b>	<b>2.9</b>	<b>3.3</b>
Horticulture and fruit growing	1.9	1.7	1.7	1.7	2.1
Sheep, beef cattle and grain farming	4.0	3.8	4.4	4.6	5.8
Other crop growing	1.8	1.3	1.5	1.0	1.0
Dairy cattle farming	1.4	1.5	1.8	1.6	2.3
Other livestock farming	0.9	0.9	0.9	0.9	1.1
Aquaculture and fishing	3.3	3.2	2.9	2.6	2.8
Forestry and logging	1.7	1.6	1.4	1.4	1.6
Primary production support services	0.4	0.3	0.3	0.4	0.3
<b>Mining</b>	<b>0.2</b>	<b>0.2</b>	<b>0.2</b>	<b>0.2</b>	<b>0.2</b>
<b>Manufacturing</b>	<b>2.5</b>	<b>2.4</b>	<b>2.1</b>	<b>1.7</b>	<b>1.5</b>
Food, beverages and tobacco	0.9	0.9	0.8	0.6	0.7
Textiles, leather, clothing and footwear	4.9	4.1	3.2	1.9	1.5
Wood and paper products	2.6	2.6	2.0	1.1	1.1
Printing and recorded media	2.7	2.6	2.6	2.2	2.1
Petroleum, coal, chemical and rubber prod.	2.2	2.1	1.8	1.4	1.4
Non-metallic mineral products	1.7	1.8	1.5	0.9	0.8
Metal and fabricated metal products	3.0	2.7	2.4	1.9	1.4
Motor vehicles and parts	9.7	8.4	6.0	4.9	3.6
Other transport equipment	3.1	3.0	2.6	2.7	2.0
Machinery and equipment manufacturing	1.9	1.9	2.1	2.0	2.1
Furniture and other manufacturing	4.1	3.6	2.7	1.5	1.5

*Source:* Commission estimates.

**Table 4.11 Effective Rates of Assistance (previous methodology) by industry grouping, 2013-14 to 2017-18**  
per cent

<i>Industry grouping</i>	<i>2013-14</i>	<i>2014-15</i>	<i>2015-16</i>	<i>2016-17</i>	<i>2017-18</i>
<b>Primary production</b>	<b>3.1</b>	<b>3.0</b>	<b>2.9</b>	<b>2.8</b>	<b>3.2</b>
Horticulture and fruit growing	2.6	2.4	2.5	2.5	2.9
Sheep, beef cattle and grain farming	4.0	3.7	4.0	4.0	5.2
Other crop growing	1.8	1.3	1.4	1.0	0.9
Dairy cattle farming	1.2	1.4	1.6	1.4	2.2
Other livestock farming	0.7	0.7	0.7	0.7	0.9
Aquaculture and fishing	3.2	3.0	2.7	2.4	2.4
Forestry and logging	2.5	2.3	2.2	2.2	2.2
Primary production support services	0.2	0.2	0.1	0.1	0.1
<b>Mining</b>	<b>0.2</b>	<b>0.1</b>	<b>0.1</b>	<b>0.1</b>	<b>0.1</b>
<b>Manufacturing</b>	<b>4.0</b>	<b>3.9</b>	<b>4.0</b>	<b>4.0</b>	<b>3.9</b>
Food, beverages and tobacco	3.5	3.5	3.4	3.4	3.4
Textiles, leather, clothing and footwear	5.4	4.7	4.1	3.6	3.5
Wood and paper products	5.0	5.0	5.0	5.1	5.0
Printing and recorded media	3.0	2.9	3.2	3.3	3.1
Petroleum, coal, chemical and rubber prod.	2.9	2.8	2.7	2.7	2.6
Non-metallic mineral products	3.1	3.0	3.0	3.0	2.9
Metal and fabricated metal products	4.2	4.2	4.3	4.4	4.2
Motor vehicles and parts	11.1	10.9	9.3	8.4	7.2
Other transport equipment	3.3	3.2	3.4	3.3	3.3
Machinery and equipment manufacturing	2.9	3.0	3.2	3.2	3.1
Furniture and other manufacturing	4.9	4.6	4.6	4.7	4.7

*Source:* Commission estimates.

**Table 4.12 Effective Rates of Assistance (absolute difference in methodologies), 2013-14 to 2017-18**  
percentage point

<i>Industry grouping</i>	<i>2013-14</i>	<i>2014-15</i>	<i>2015-16</i>	<i>2016-17</i>	<i>2017-18</i>
<b>Primary production</b>	<b>-0.1</b>	<b>-0.1</b>	<b>0.0</b>	<b>0.1</b>	<b>0.1</b>
Horticulture and fruit growing	-0.7	-0.8	-0.8	-0.8	-0.8
Sheep, beef cattle and grain farming	0.0	0.1	0.4	0.6	0.6
Other crop growing	0.0	0.0	0.0	0.0	0.0
Dairy cattle farming	0.2	0.2	0.2	0.2	0.0
Other livestock farming	0.2	0.2	0.2	0.2	0.2
Aquaculture and fishing	0.1	0.1	0.1	0.1	0.4
Forestry and logging	-0.8	-0.7	-0.8	-0.8	-0.6
Primary production support services	0.1	0.1	0.2	0.3	0.2
<b>Mining</b>	<b>0.1</b>	<b>0.1</b>	<b>0.1</b>	<b>0.1</b>	<b>0.1</b>
<b>Manufacturing</b>	<b>-1.5</b>	<b>-1.6</b>	<b>-1.9</b>	<b>-2.2</b>	<b>-2.4</b>
Food, beverages and tobacco	-2.5	-2.6	-2.7	-2.7	-2.7
Textiles, leather, clothing and footwear	-0.5	-0.5	-0.9	-1.7	-1.9
Wood and paper products	-2.5	-2.4	-3.0	-4.0	-3.9
Printing and recorded media	-0.3	-0.3	-0.6	-1.1	-1.1
Petroleum, coal, chemical and rubber prod.	-0.7	-0.7	-1.0	-1.3	-1.3
Non-metallic mineral products	-1.4	-1.2	-1.4	-2.0	-2.1
Metal and fabricated metal products	-1.3	-1.6	-1.9	-2.5	-2.8
Motor vehicles and parts	-1.5	-2.5	-3.3	-3.5	-3.6
Other transport equipment	-0.2	-0.3	-0.8	-0.6	-1.3
Machinery and equipment manufacturing	-1.0	-1.1	-1.1	-1.2	-1.0
Furniture and other manufacturing	-0.8	-1.0	-1.9	-3.2	-3.2

*Source:* Commission estimates.

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