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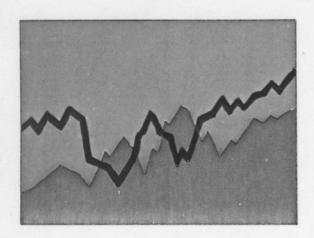
THE VICE PRESIDENT WASHINGTON

September 10, 1975

MEMORANDUM FOR BILL BAROODY

Attached is this week's copy of the Weekly Briefing Notes.

Sulson



WEEKLY BRIEFING NOTES ON U.S. DOMESTIC DEVELOPMENTS

Prepared for the President and the Vice - President



SEPTEMBER 8, 1975

COMPILED BY THE FEDERAL STATISTICAL SYSTEM

Coordinated by the Bureau of the Census at the request of the Statistical Policy Division, Office of Management and Budget

Vincent P. Barabba, Director Bureau of the Census

Joseph W. Duncan,
Deputy Associate Director
for Statistical Policy
Office of Management and Budget

SOURCES OF DATA

Plant and Equipment Expenditures

U.S. Department of Commerce, Bureau of Economic Analysis, "Survey of Current Business"

Manufacturers Capital Appropriations

The Conference Board

The Employment Situation

U.S. Department of Labor, Bureau of Labor Statistics, "Employment and Earnings Statistics for the United States"

Manufacturers' Shipments, Inventories, and Orders

U.S. Department of Commerce, Bureau of the Census, "Manufacturers' Shipments, Inventories and Orders, Series M3-1"

Manufacturers' Export Sales and Orders of Durable Goods

U.S. Department of Commerce, Bureau of the Census "Manufacturers' Export Sales and Orders of Durable Goods"

Wholesale Price Index

U.S. Department of Labor, Bureau of Labor Statistics, "Wholesale Price Index"

Construction Expenditures

U.S. Department of Commerce, Bureau of the Census, "Value of New Construction Put in Place"

Population Distribution

Bureau of the Census, Population Division, "How the Racial Composition of Cities Changes"

College Enrollment

Institute of International Education, "Open Doors, 1974"

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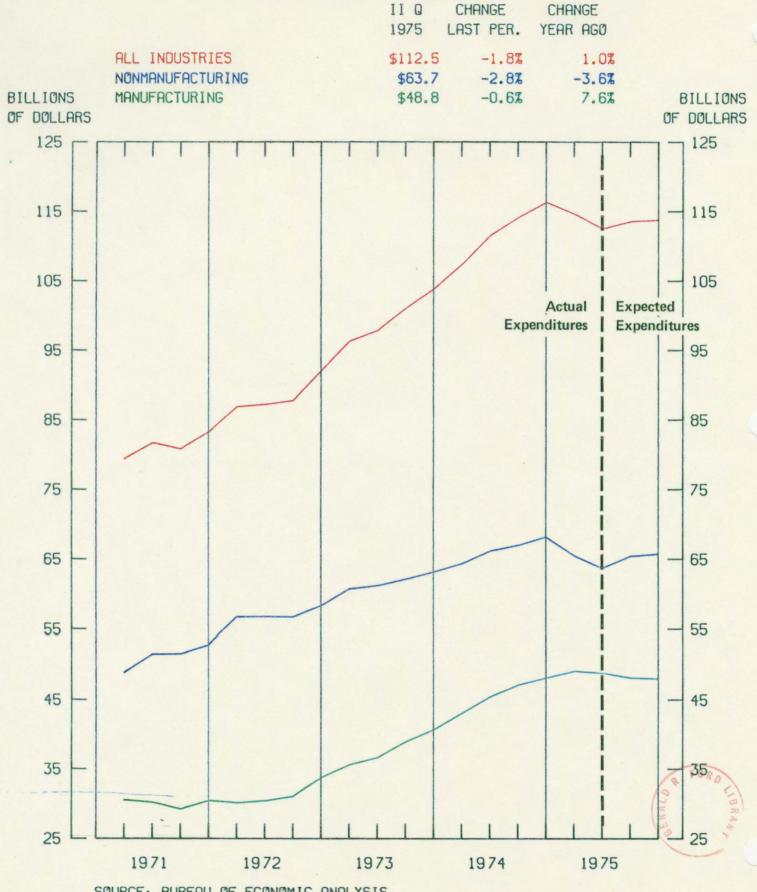
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A.1.5 - Plant and Equipment Expenditures

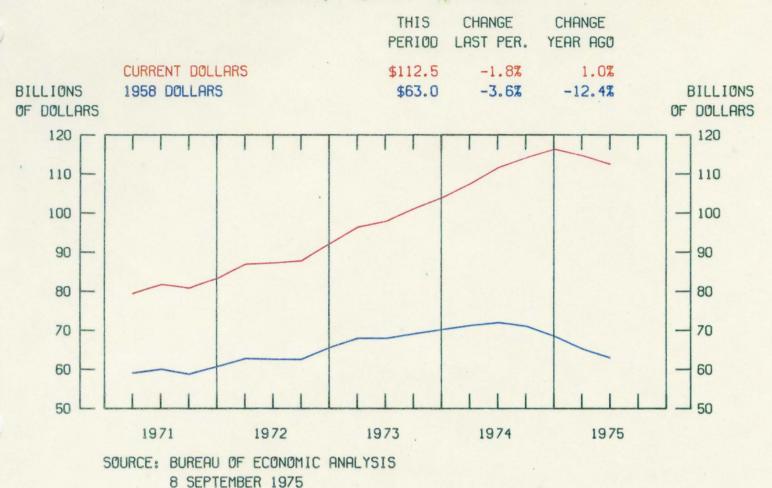
Seasonally Adjusted Annual Rate



SOURCE: BUREAU OF ECONOMIC ANALYSIS 8 SEPTEMBER 1975

A.1.5 - Plant and Equipment Expenditures In Current and Constant Dollars

Seasonally Adjusted Annual Rate

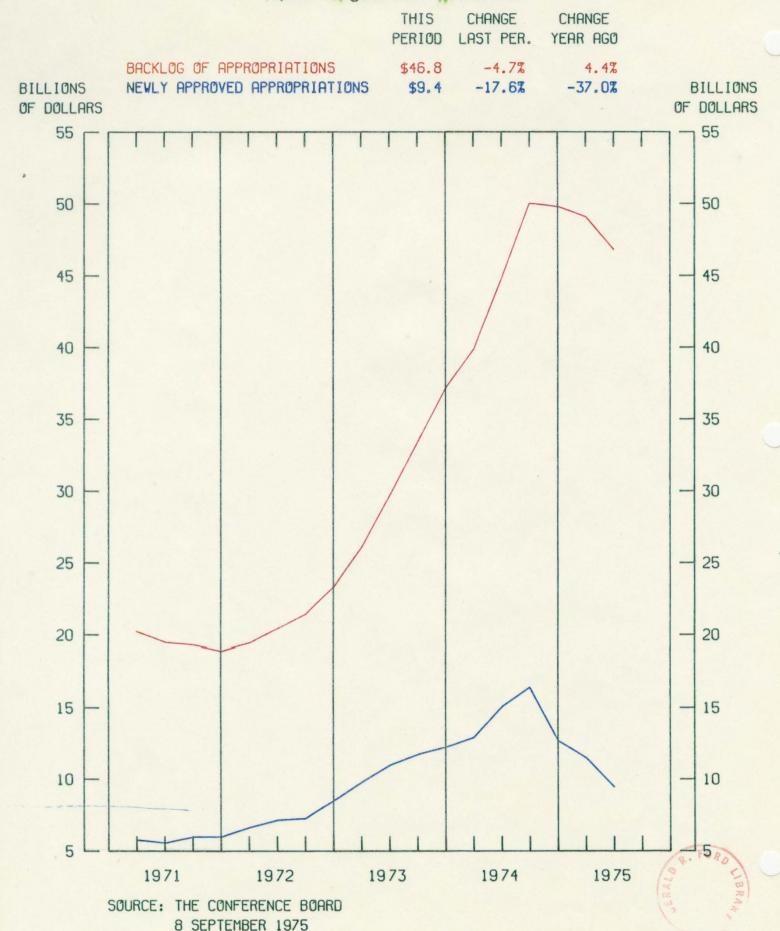


- Actual Outlays by All Industries in the second quarter declined 1.8 percent to an annual rate of \$112.5 billion.
 - They are expected to increase 1 percent in the third quarter and to remain at this level in the fourth.
- Nonmanufacturing Industries were the major factor, declining 2.8 percent.
 - Manufacturing dropped 0.6 percent.
- The decline in Real Spending (1958 dollars) was more significant.
 - Over the year Real Spending decreased 12.4 percent.



A.1.5 - Manufacturers' Capital Appropriations

(1,000 Largest Manufacturers)

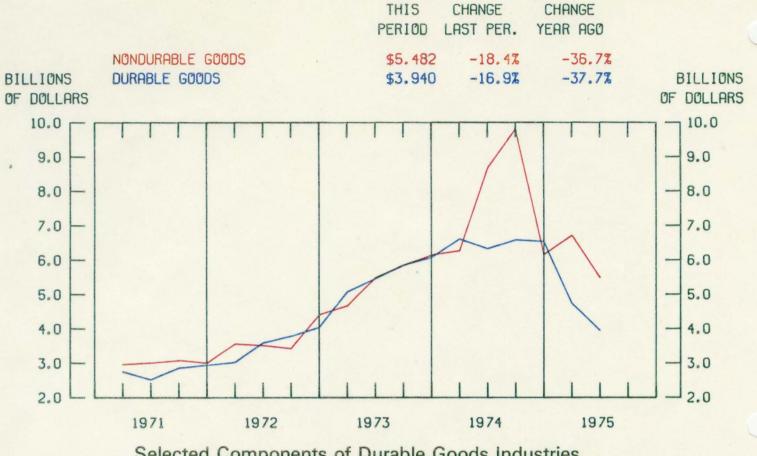


- Capital Appropriations (authorizations to spend at a later date) of the Nation's 1,000 largest manufacturers totaled \$9.42 billion in the second quarter, down 17.7 percent.
 - Third quarterly decline in a row, since the peak of \$16.38 billion registered in the third quarter of 1974.
 - 42.5 percent below last year's third quarter, the steepest three-quarter decline since the survey began in 1953.
- Backlog of Unspent Appropriations dropped almost 5 percent, as Expenditures exceeded Appropriations.

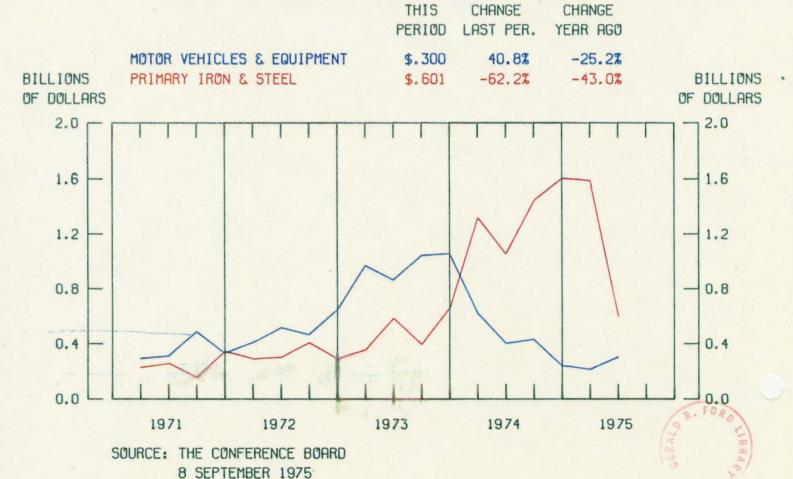


A.1.5 - Manufacturers' Capital Appropriations

Durable and Nondurable Goods Industries

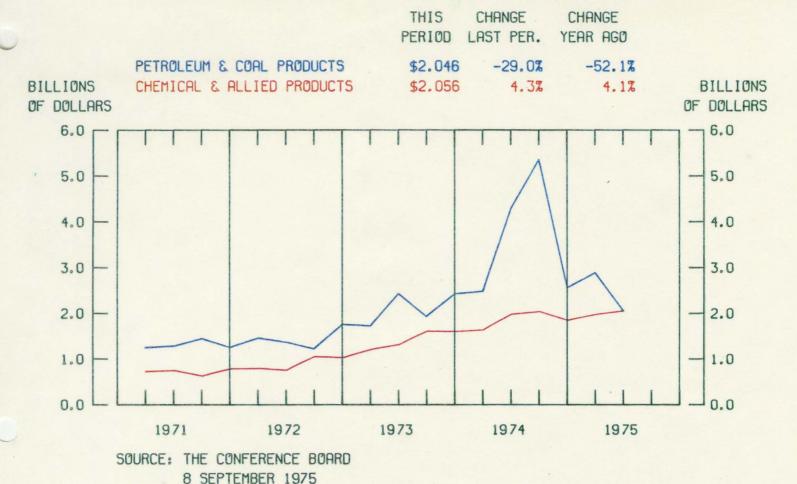


Selected Components of Durable Goods Industries



A.1.5 - Manufacturers' Capital Appropriations

Selected Components of Nondurable Goods Industries

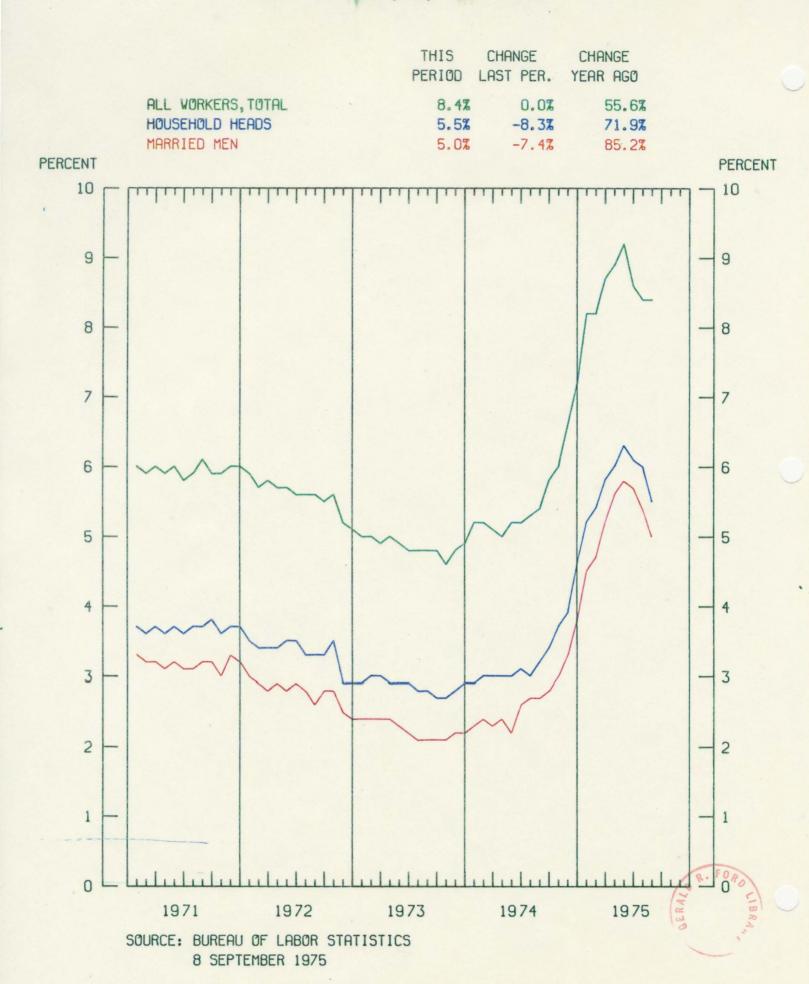


- Durable Goods Producers lowered their appropriations for the third straight month, down 16.9 percent.
 - Cutback in Primary Iron and Steel Appropriations was a major cause for the overall drop.
 - An exception to the appropriations cutback was the Motor Vehicle and Equipment (Automotive) Industry, which raised authorizations 40.8 percent

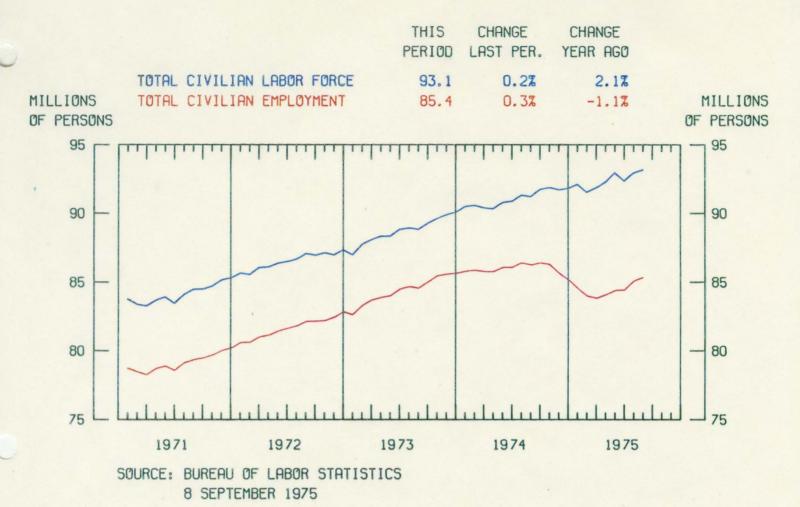
 its first increase since last year's third quarter.
 - 71.6 percent below the fourth quarter of 1973.
- Nondurable Appropriations also decreased, dropping 18.4 percent in the second quarter after showing an increase of 9.2 percent in the previous quarter.
 - The 29 percent drop in appropriations of Petroleum and Coal Products led the overall decline.
 - In comparison, Chemical and Allied Products Appropriations improved 4.3 percent.



A.2.1 - Unemployment Rate



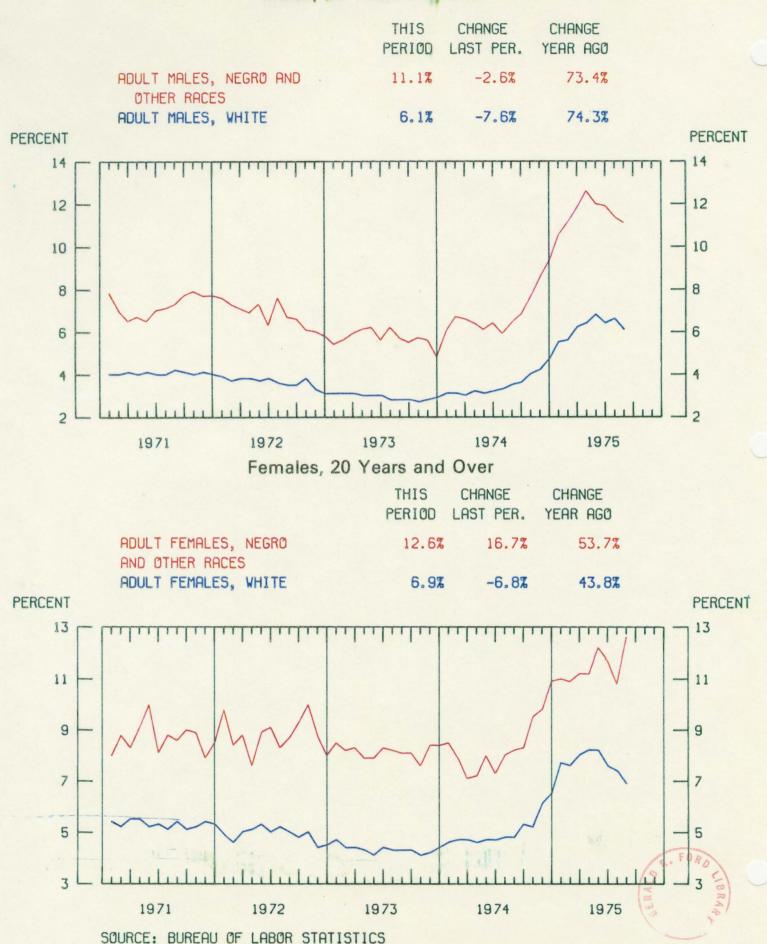
A.2.1 - Civilian Labor Force and Employment



- The Overall Unemployment Rate held steady in August at 8.4 percent.
 - Significant declines were recorded in the rates for Household Heads and Married Men.
- Total Civilian Employment increased for the fifth straight month.
 - Up 1.5 million from the recession low registered in March.
- The Civilian Labor Force was up 230,000 at 93.1 million.
 - Over the past year the Labor Force has expanded by 1.9 million, a markedly slower rate than in the two previous years.

A.2.1 - Unemployment Rate By Age, Sex, and Race

Males, 20 Years and Over



8 SEPTEMBER 1975

A.2.1 - Unemployment Rate by Age, Sex, and Race Both Sexes, 16 to 19 Years

| | | | | THIS PERIOD | CHANGE LAST PER. | CHANGE YEAR AGO | | |
|---------|-----|-------------------------|----------|-------------|---------------------|--------------------|----|---------|
| | | TEENAGERS, OTHER RAD | | 37.4% | 11.6% | 18.0% | | |
| | | TEENAGERS, | | 19.1% | 8.5% | 43.6% | | |
| PERCENT | | | | | | | | PERCENT |
| 45 | Г | سلسلساس | سسسسس | Julululul | بانتانيان | ummunu | 77 | 45 |
| 40 | - | | \ | | | M, | - | 40 |
| 35 | - | . ^- | | \ \ \ \ | ^^ | | - | 35 |
| 30 | - | ~~ ~ | | MM | | | - | 30 |
| 25 | - | | | | | | - | 25 |
| 20 | - | | | | | ~~ | - | 20 |
| 15 | - | ~~~ | | | ~~~ | 1 | - | 15 |
| 10 | , _ | سلسلسلسا | سلسلسلسل | | سلسلسلن | ىلىبلىلىلى | | 10 |
| | | 1971 | 1972 | 1973 | 1974 | 1975 | | |

SOURCE: BUREAU OF LABOR STATISTICS 8 SEPTEMBER 1975

- The stability in unemployment masked divergent trends in black and white joblessness.
- The decrease in unemployment among White Adult Men was more than double that of Blacks.
- The Unemployment Rate for Adult Black Women rose to an all time high of 12.6 percent, up 16.7 percent from July.
 - The comparable rate for White Women was down 6.8 percent.
- To a lesser extent, the same pattern prevailed among Teenagers:
 - Black teenage unemployment was up 11.6 percent.
 - White teenage unemployment rose 8.5 percent.



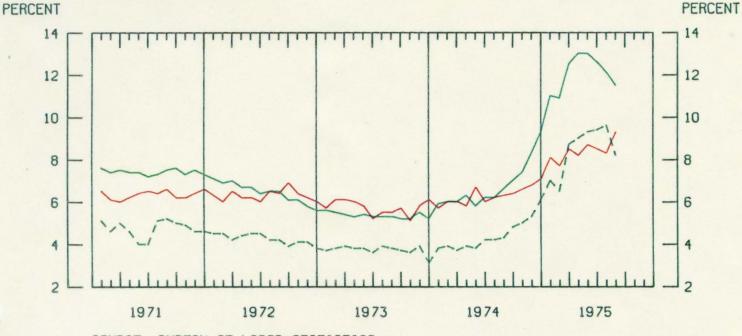
A.2.1 - Unemployment Rate By Industry

| | | | | | THIS PERIOD | CHANGE LAST PER. | CHANGE YEAR AGO | | |
|-----|------------|---|--|----------------------------|---------------------------------|---------------------|----------------------------------|-------------|---|
| 050 | OFNT | | CONSTRUCTION AGRICULTURA MANUFACTURI WHOLESALE A | L WORKERS | 19.9% 10.5% 10.5% 8.9% | | 76.1% 50.0% 90.9% 43.5% | | |
| PER | CENT 25 | Γ | | | أسلسلسل | ulululu | بانتانيان | PERCEN 25 | ı |
| | 23 | _ | | | | | | 23 | |
| | 21 | _ | | | | | | 21 | |
| | 19 | _ | | | | | | 19 | |
| | 17 | _ | | | | | | - 17 | |
| | 15 | _ | | | | | | 15 | |
| | 13 | - | | | | | A | 13 | |
| | 11 | _ | \ \ / | $\mathcal{M}_{\mathbf{a}}$ | | | | - 11 | |
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| | 5 | _ | | | | 1-1 | | - 5 | |
| | 3 | | سلتلسلت | | ليبليبليبلي | بالتيلييان | Lulululu |]_3 | |
| | | | 1971 | 1972 | 1973 | 1974 | 1975 | R. FORD | 1 |
| | | | SOURCE: BUREAU | J OF LABOR STATI | ISTICS | | | P B B A |) |

8 SEPTEMBER 1975

A.2.1 - Unemployment Rate By Occupation

| | THIS PERIOD | CHANGE LAST PER. | CHANGE YEAR AGO |
|-----------------------|----------------|---------------------|--------------------|
| BLUE COLLAR | 11.5% | -5.0% | 74.2% |
| SERVICE WORKERS | 9.3% | 12.1% | 47.6% |
| SKILLED CRAFT WORKERS | 8.2% | -14.6% | 90.7% |



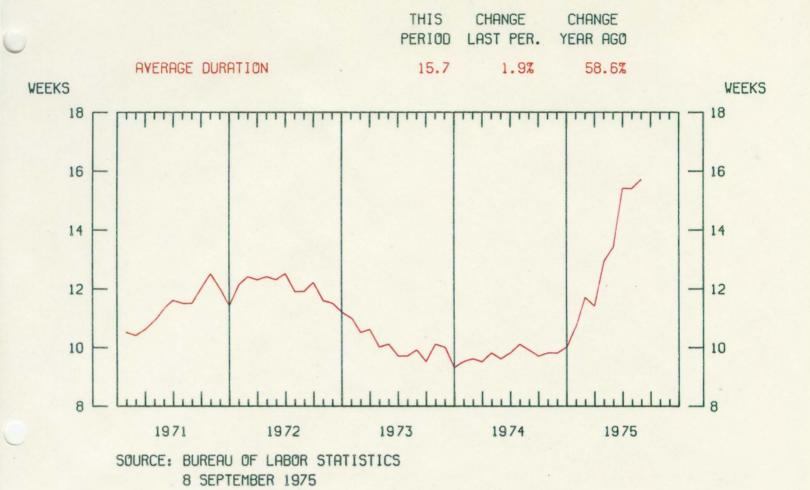
SOURCE: BUREAU OF LABOR STATISTICS 8 SEPTEMBER 1975

- There were also significant offsetting movements among the major industry groups.
 - Unemployment in Manufacturing and Contract Construction decreased substantially.
 - Joblessness was up in Wholesale and Retail Trade and among Agricultural Wage and Salary Workers.
- Among the Occupational Groups, the rate for Blue-Collar Workers continued to decline, led primarily by Skilled Craft Workers.
- However, Service Worker Unemployment moved up to the highest level since the current recession began.

A.2.2 - Duration of Unemployment Number of Workers Unemployed



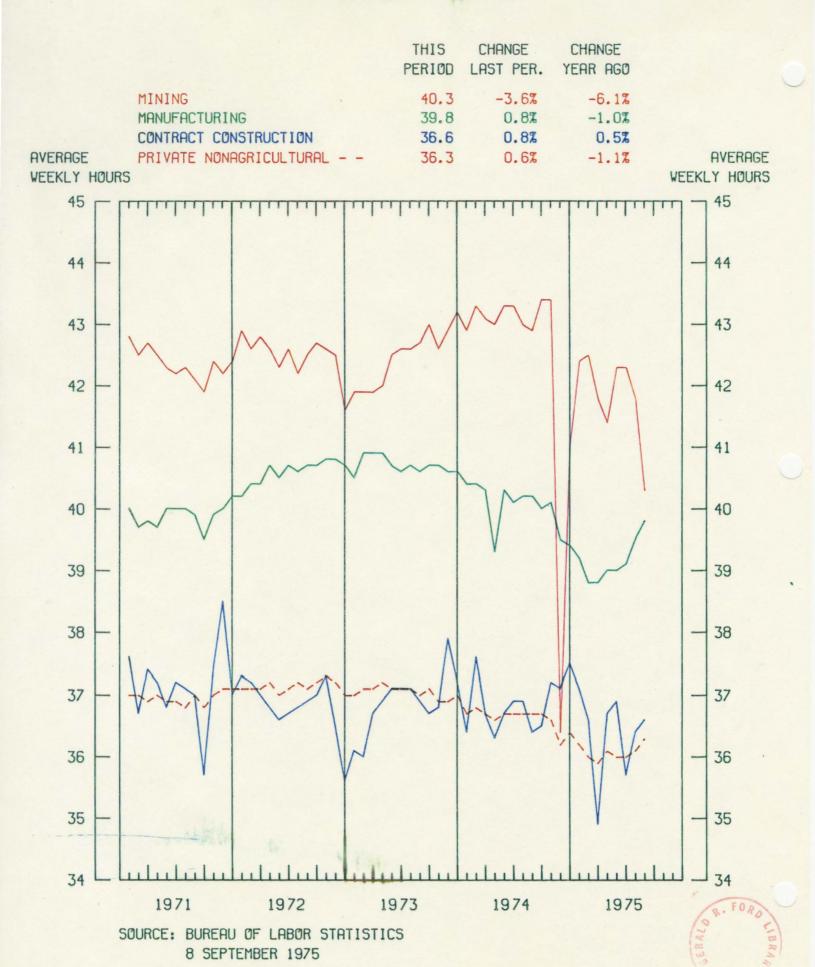
A.2.2 - Average Duration of Unemployment



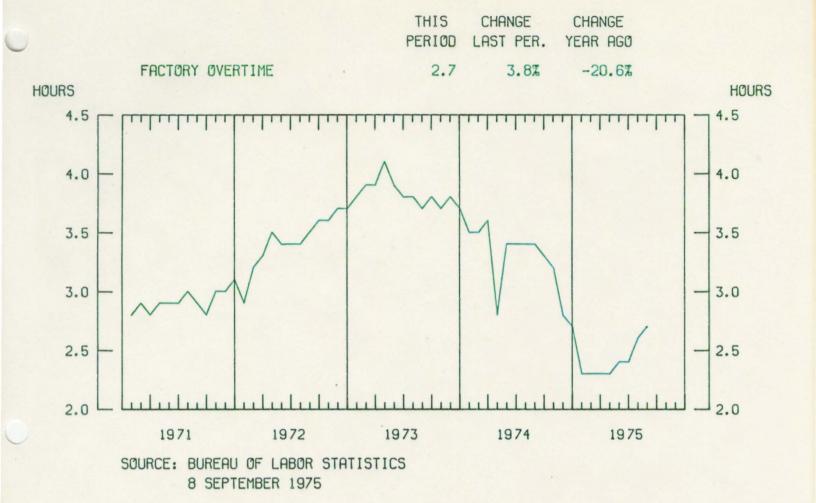
- Long term joblessness decreased for the first time in over a year.
 - The number of workers unemployed 15 weeks or longer dropped by 160,000.
- Despite this decrease the Average Duration was up slightly to 15.7 weeks.
 - Nearly six weeks above the year earlier average.



A.3.1 - Average Workweek



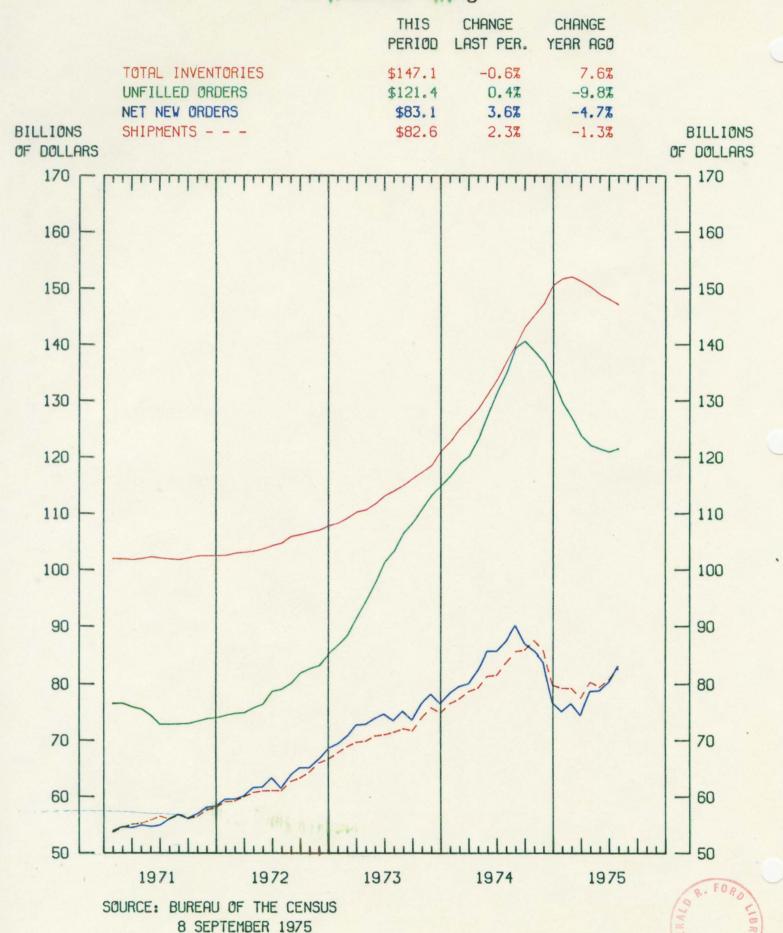
A.3.1 - Average Overtime Hours in Manufacturing



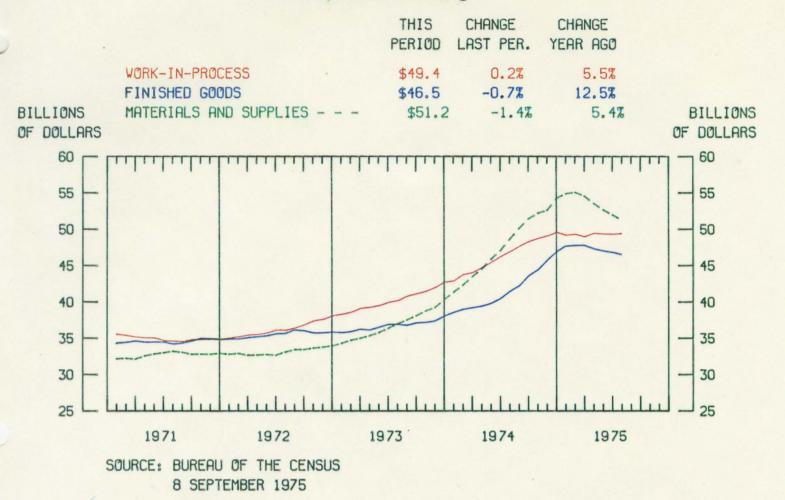
- The Average Workweek rose two-tenths of an hour.
 - Much of the gain stemmed from a 0.3 hour increase in Manufacturing.
 - The August level stands a full hour above the recession low of 38.8 hours reached in February and March.
 - The only decrease was registered in Mining, which dropped 1.5 hours in August.
 - Factory Overtime edged up 0.1 hour, continuing the small gains posted since April.



A.4.4 - Manufacturers' Shipments, Inventories, Orders All Manufacturing



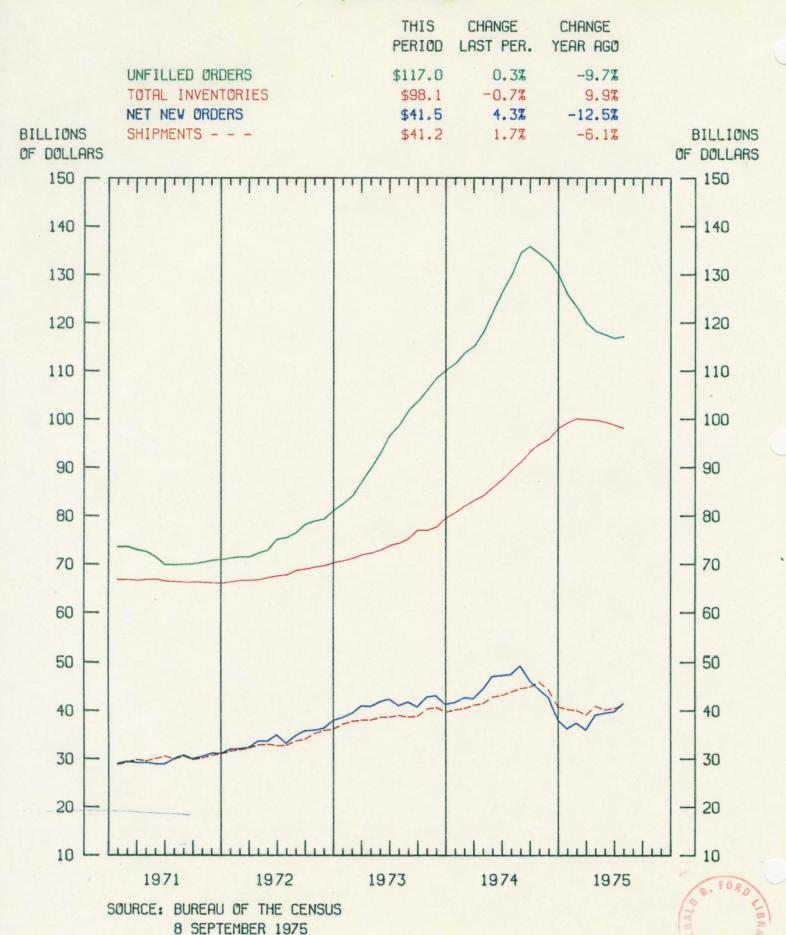
A.4.4 - Inventories by Stage of Fabrication All Manufacturing



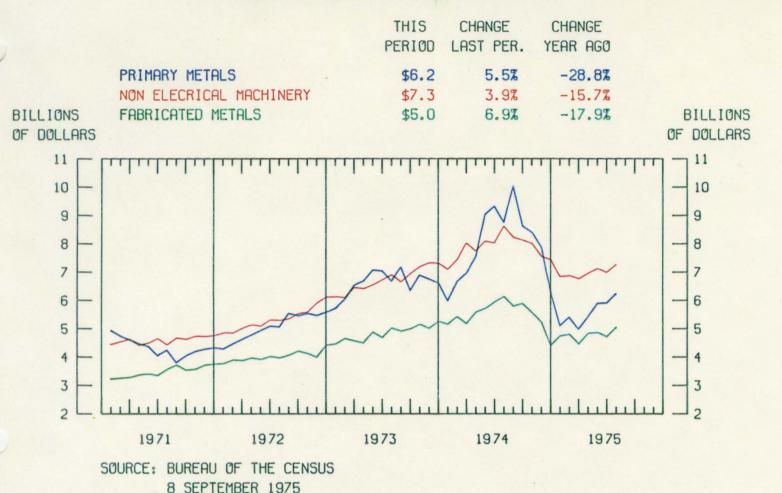
- New Orders rose sharply in July, the fourth consecutive monthly increase.
 - Largest gain since the 6 percent increase in April, moving the level of New Orders above that of Shipments for the first time since last September.
- Shipments increased 2.3 percent to \$82.6 billion.
- Unfilled Orders increased \$492 million.
 - First increase since October 1974.

- R. FORO LIBRAY P
- Inventories continued to shrink at the factory level, contracting an additional \$950 million.
 - Fifth consecutive month of decline.
 - Materials and Supplies accounted for \$750 million of the Total Inventory

A.4.4 - Manufacturers' Shipments, Inventories, Orders Durable Goods

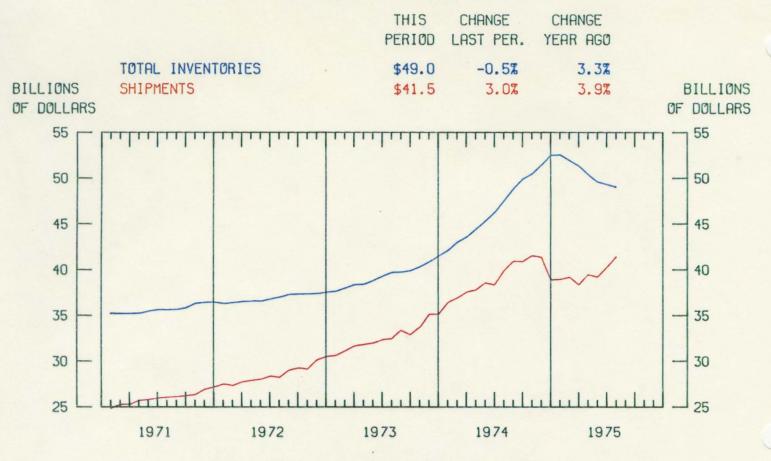


A.4.4 - Net New Orders Selected Durable Goods Industries

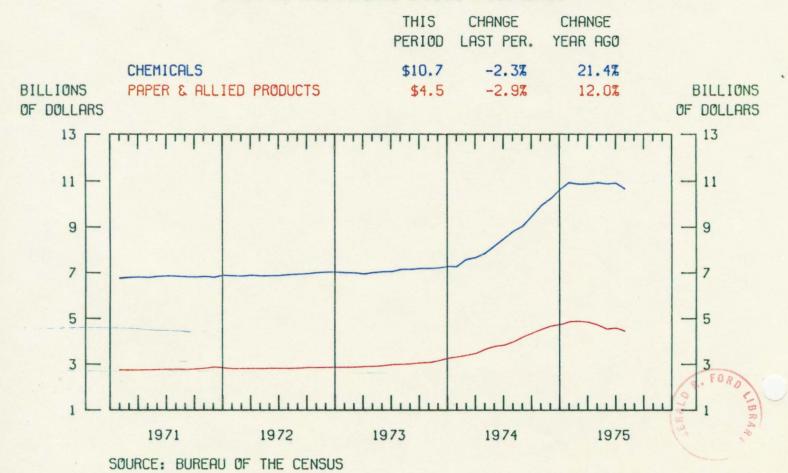


- Durable Goods Shipments rose 1.7 percent in July after a 0.6 percent increase in June.
- Unfilled Orders increased 0.3 percent after nine consecutive months of decline.
- Inventory Liquidation continued a further 0.7 percent in July.
- New Orders were up 4.3 percent, the largest gain since April's near-record increase.
 - Increases reported in Primary Metals (\$323 million), Fabricated Metals (\$323 million), and Nonelectrical Machinery (\$274 million).

A.4.4 - Manufacturers' Shipments, Inventories, Orders Nondurable Goods

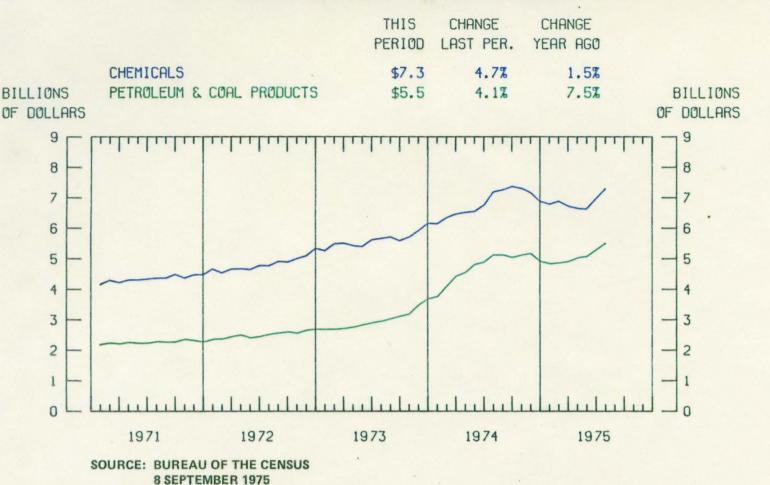


Selected Nondurable Goods Inventories



8 SEPTEMBER 1975

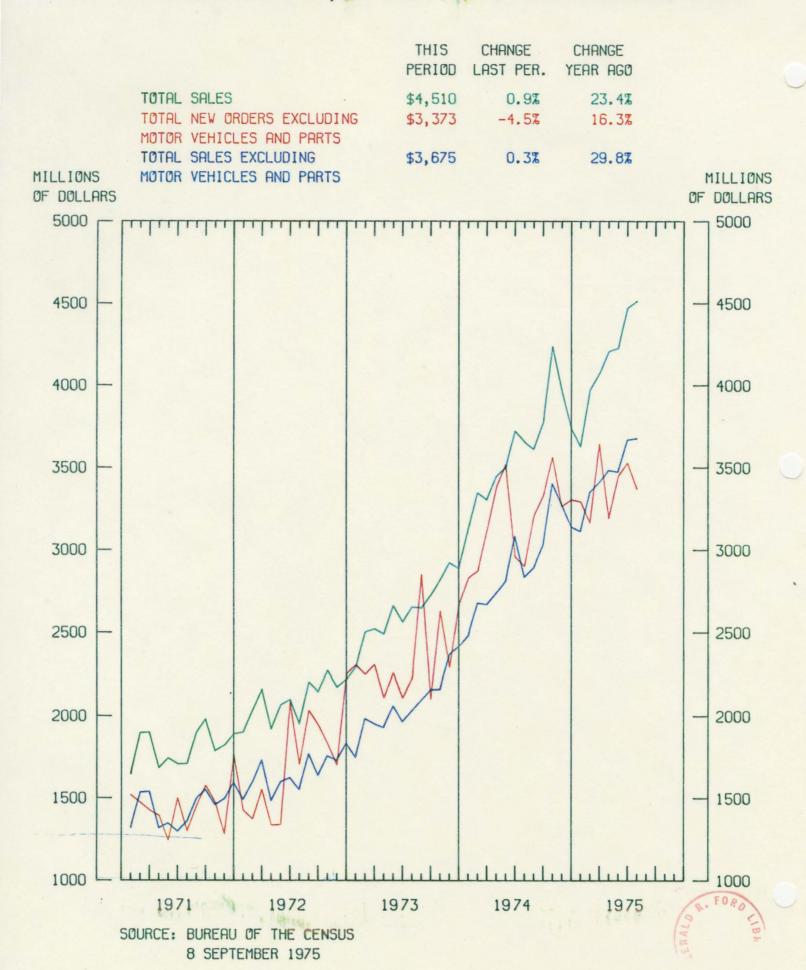
A.4.4 - Manufacturers' Shipments Selected Nondurable Goods Industries



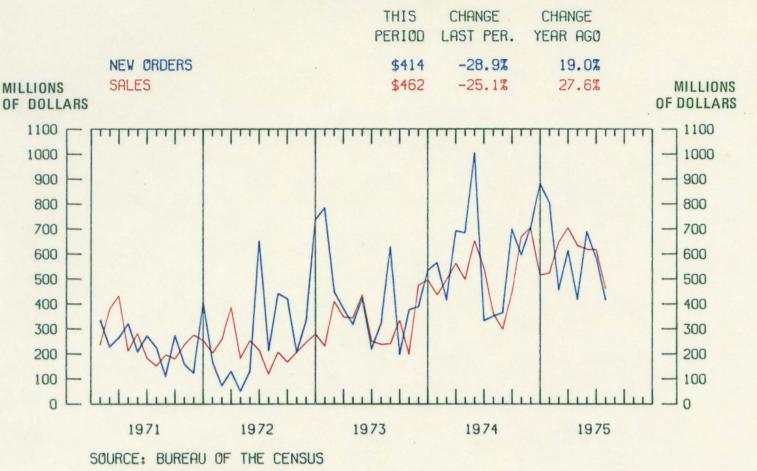
- Inventory liquidation in Nondurable Manufacturing slowed slightly from June.
 - Small increases in a majority of Industry Groups were more than offset by larger drops in Chemicals and Paper Products.
- Shipments of Nondurables moved up sharply, !ed by:
 - Chemicals
 - Petroleum and Coal Products



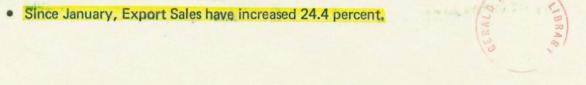
A.5.2 - Manufacturers' Export Sales and Orders of Durable Goods



A.5.2 - Manufacturers' Export Sales and Orders Aircraft and Parts



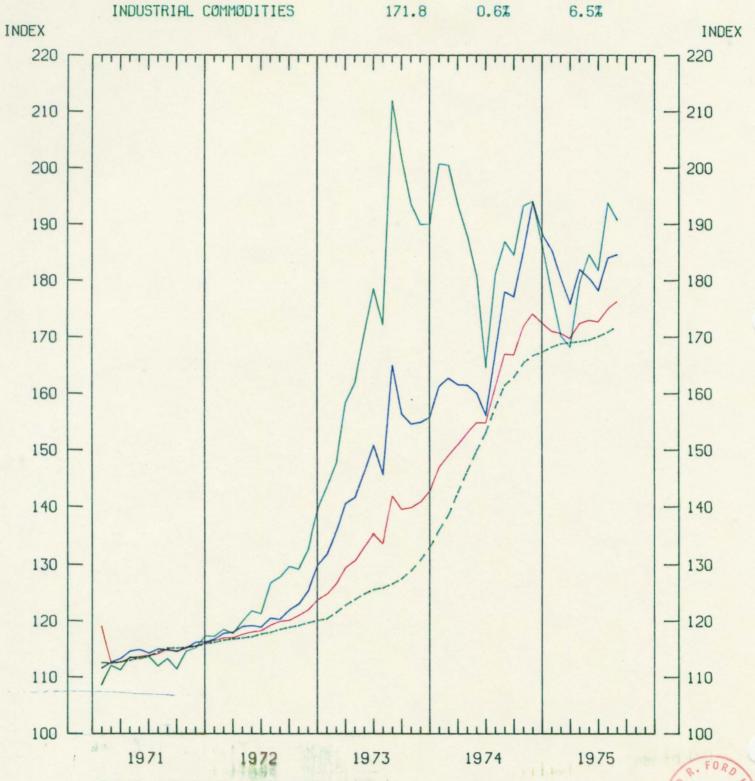
- 8 SEPTEMBER 1975
- Export New Orders placed with Durable Goods Manufactures (excluding Motor Vehicles and Parts) decreased \$158 million (4.5 percent).
 - First decrease since April.
 - A \$168 million drop in Aircraft Orders caused the decline.
- Total Export Sales of Durable Goods increased to \$4,510 million, the sixth consecutive monthly rise.
 - A \$155 million decrease in Aircraft Sales was was offset by a \$104 million increase in Machinery Sales and smaller increases in all other categories.



• Export Sales of Durable Goods (excluding Motor Vehicles and Parts) at \$3,675 million in July were virtually unchanged from June.

A.6.2 - Wholesale Price Index (1967=100)

| | THIS | CHANGE LAST PER. | CHANGE YEAR AGO |
|---|----------------|---------------------|--------------------|
| FARM PRODUCTS PROCESSED FOODS AND FEEDS | 190.7 184.5 | -1.5% 0.3% | 2.1% |
| ALL COMMODITIES | 176.2 | 0.8% | 5.6% |
| INDUSTRIAL COMMODITIES | 171.8 | 0.6% | 6.5% |



SOURCE: BUREAU OF LABOR STATISTICS 8 SEPTEMBER 1975

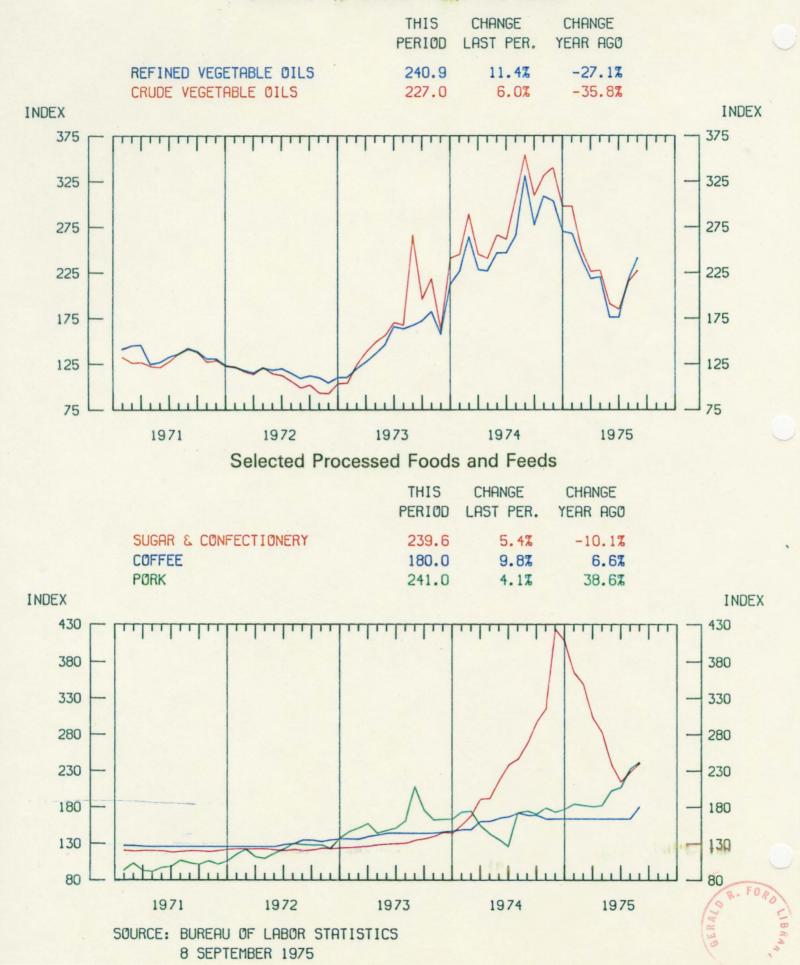
- The increase in Wholesale Prices (All Commodities) slowed somewhat in August, up
 0.8 percent compared to 1.2 percent in July.
 - Due to the particular seasonal adjustment process used, the All Commodities Index rose faster than any of its components (see Note below).
- Prices of Industrial Commodities continued to accelerate after relative stability during the first half of the year.
- Processed Foods and Feeds increased by a modest 0.3 percent compared with July's 3.3 percent jump.
- Farm Products Prices retreated 1.5 percent after the 6.6 percent surge in July.

NOTE: All Commodities is seasonally adjusted independently and is not derived by adding together its seasonally adjusted components. On occasion, as in August, this procedure can produce situations in which changes in components are inconsistent with changes in the total, particularly when prices fluctuate widely.



A.6.2 - Wholesale Price Index

Selected Processed Foods and Feeds

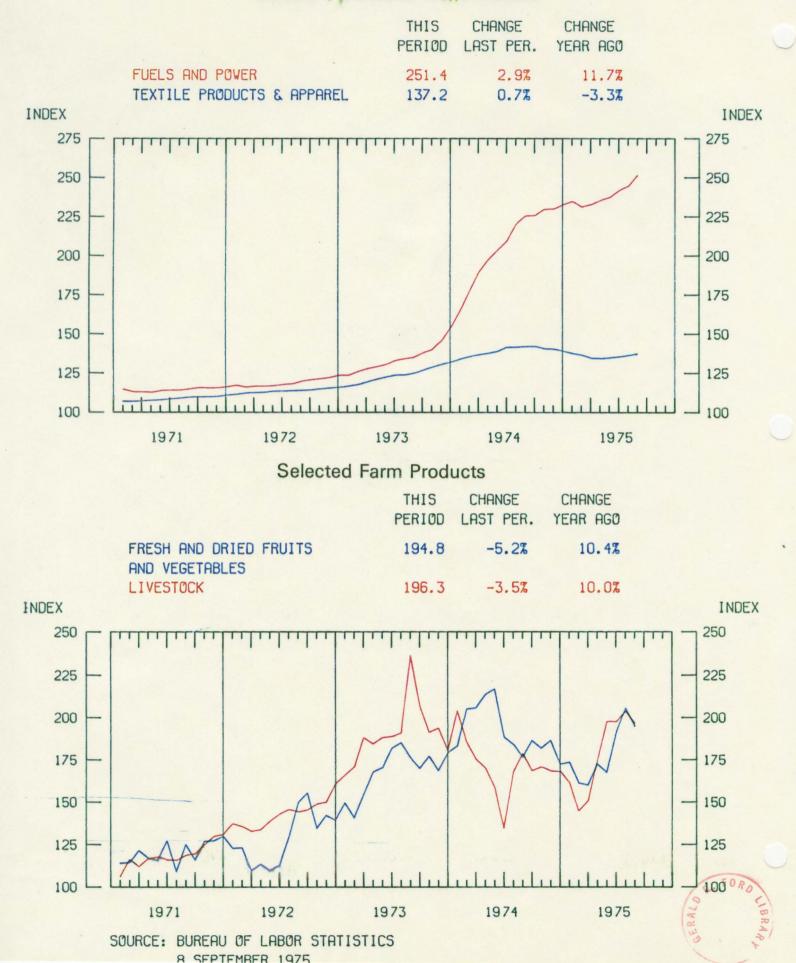


- Vegetable Oils (both crude and refined) continued the upswing begun in July.
- Sugar and Confectionery increased again in August.
 - Up 11.9 percent since June.
- Coffee prices surged a record 9.8 percent in August after no change in the previous ten months.
- Pork increased for the fifth month in a row.
 - Up 33.6 percent since March.



A.6.2 - Wholesale Price Index

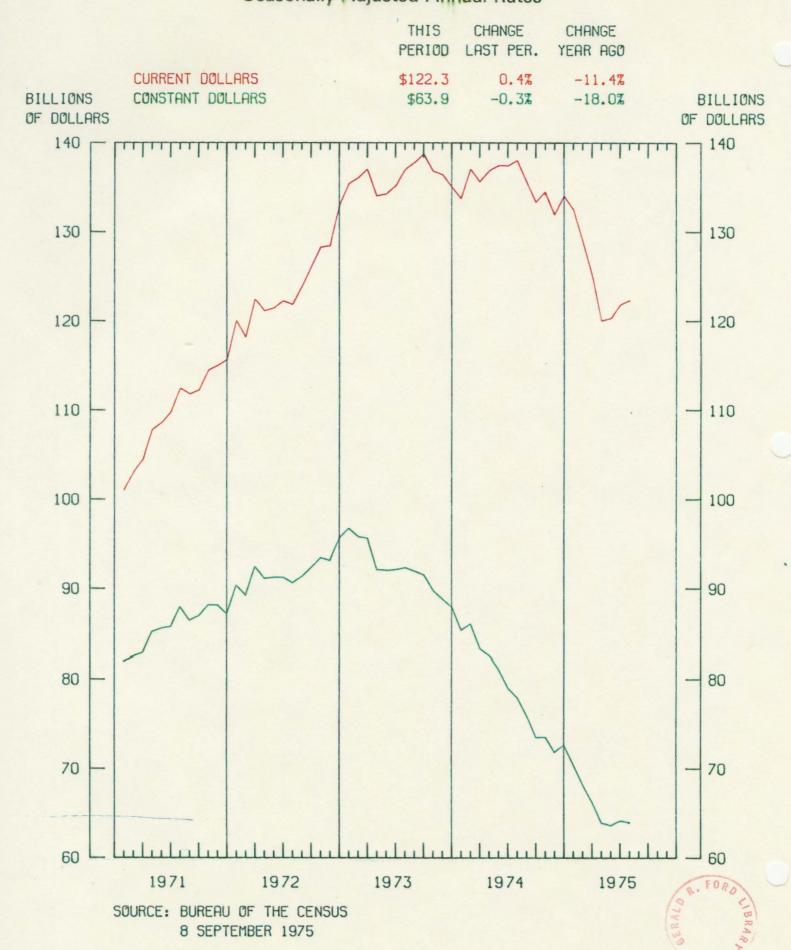
Selected Industrial Commodities



- Fuels and Related Products and Power, up 2.9 percent, were responsible for more than half of the total increase in Industrial Commodities.
 - Index has doubled since January, 1973.
- Wholesale prices for Textile Products and Apparel have begun to increase after declining during the period September 1974-March 1975.
 - Up 2.1 percent since April.
- The principal contributors to the decline in Farm Products were:
 - Fresh Fruits and Vegetables-down 5.2 percent.
 - Livestock-down 3.5 percent.
 - First decline in livestock prices in six months.



A.7.2 - Value of New Construction Work Done Seasonally Adjusted Annual Rates



A.7.2 - Value of New Construction Work Done Private and Public Construction Seasonally Adjusted Annual Rate

CHANGE THIS CHANGE PERIOD LAST PER. YEAR AGO PRIVATE CONSTRUCTION \$45.2 0.9% -20.4% BILLIONS OF PUBLIC CONSTRUCTION \$18.7 -3.1% -11.0% BILLIONS OF 1967 DOLLARS 1967 DOLLARS 75 75 65 65 55 55 45 45 35 35 25 25 15

> SOURCE: BUREAU OF THE CENSUS 8 SEPTEMBER 1975

1972

1971

 Construction Spending, in real terms, continued to decrease after a brief uptick in July.

1973

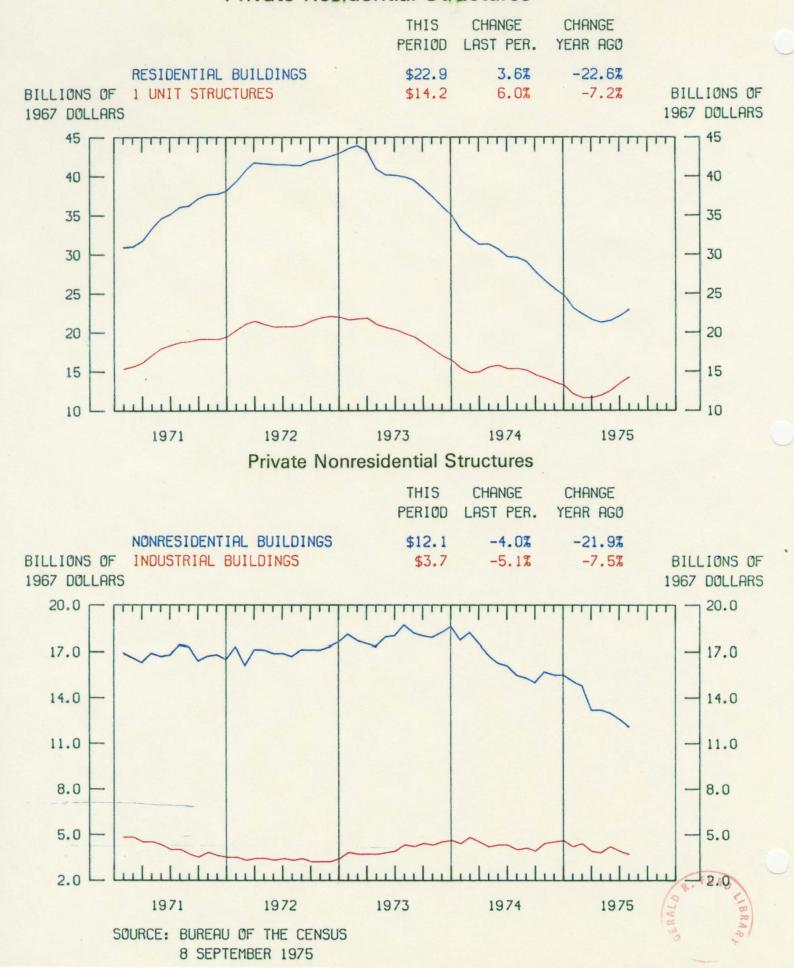
1974

1975

- In current dollars, spending was up 0.4 percent.
- Private Construction rose almost 1 percent, the first real increase since July, 1973.
 - Public Construction, however, was down 3.1 percent.



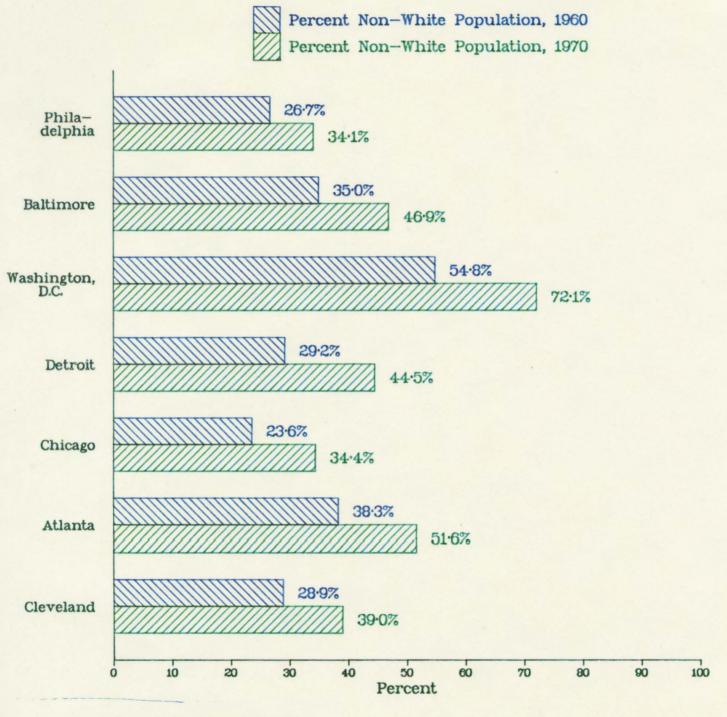
A.7.2 - Value of New Construction Work Done Private Residential Structures



- Private Residential Buildings, up 3.6 percent, were the major cause for the increase in Private Construction.
 - One-Unit Structures rose 6 percent.
- Private Nonresidential Buildings dropped 4 percent, and have declined 22.9 percent since the last increase recorded in October 1974.
 - Industrial Buildings fell 5.1 percent to a level of \$3.7 billion.



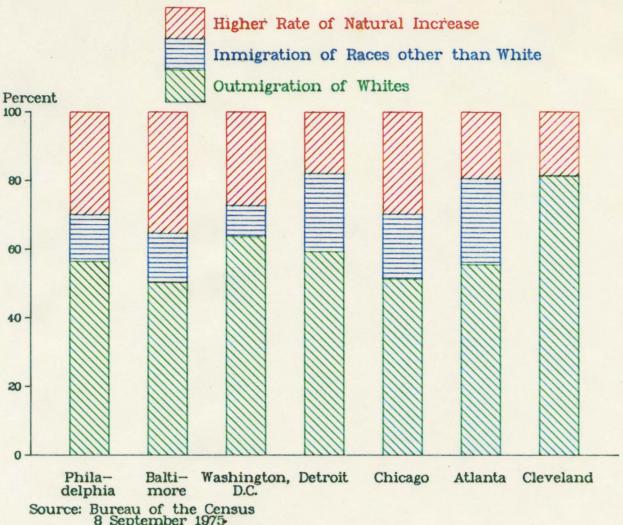
B.1.2 - Racial Composition of Selected Large Cities



Source: Bureau of the Census 8 September 1975



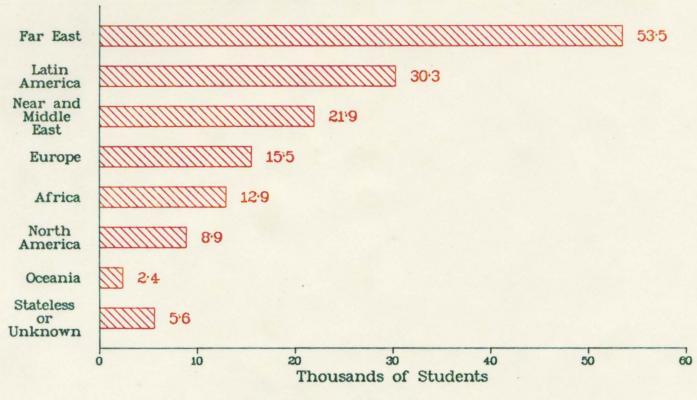
B.1.2 - Factors of Change as Percent of Increase in Non-White Population Component



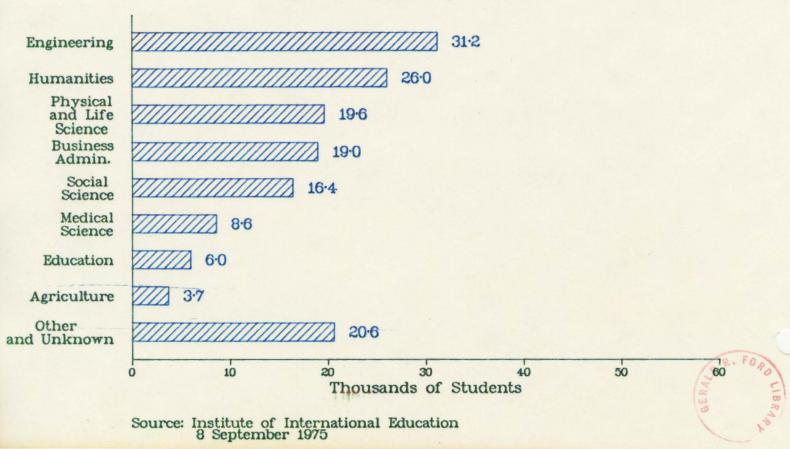
- 8 September 1975
- In a study of eleven cities with large Non-white populations, it was found that between 1960 and 1970 the movement of Whites from central cities of metropolitan areas was the single most important factor in changing the cities' racial composition.
- By 1970 six of the eleven cities studied had populations that were over 40 percent Non-white.
 - Net Inmigration and higher rates of natural increase among Non-whites were less important factors than the movement of the White population.
 - In these cities White outmigration accounted for more than 50 percent of the increase in the percentage Non-white population between 1960 and 1970.
- During the 1960's in several of the cities with large Non-white populations, among them cleveland, there was a net outmigration of both whites and other races.
 - · However, White outmigration was greater, yielding a net increase in the percent of Non-white population over the period.

B.4.3 - Foreign Students in U.S. Colleges, 1973-74

By Region of Origin



By Field of Study



- More than 150,000 students from other countries were enrolled in institutions of higher education in the United States and its outlying territories during 1973-74.
 - This is the largest foreign enrollment ever, and a four-fold increase in less than 20 years.
- Fifty-three thousand students from the Far East accounted for 35 percent, comprising the largest proportion.
- Hong Kong sent 10,764, the largest number of students.
 - India, which led the previous year's enrollment, was next, followed by Iran
- Engineering continued to be the most popular field of study, chosen by 31,000, or 21 percent, of the foreign students.
- The Humanities was next, selected by 17 percent.

