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OFFICE OF THE VICE PRESIDENT WASHINGTON

April 1, 1976

MEMORANDUM FOR MR. BAROODY

The Vice President has asked me to send this week's copy of the $\underline{\text{Weekly Briefing}}$ Notes.

Dick Allison

WEEKLY BRIEFING NOTES

TABLE OF CONTENTS

FOR CALENDER YEAR 1976

March 29,1976

FREQUENCY LEGEND: W=Weekly: M=Monthly; Q=Quarterly; A=Anni	ual; O=Other
SECTION A-General Economic Indicators	DATE SERIES LAST AP- PEARED IN BRIEFING NOTES
Part 1-National Income and Product	
A.1.1 (Q) Gross National Product	
Part 2-Employment and Unemployment A.2.1 (M) Unemployment Rate	
Part 3-Hours, Earnings and Productivity A.3.1 (M) Average Workweek, Manufacturing A.3.2 (M) Compensation Per Man-hour A.3.3 (Q) Productivity Indexes A.3.4 (M) Real Earnings A.3.5 (M) Work Stoppages	1/19.2/16.3/15 1/19.2/16.3/15 2/2.3/1 1/26.2/23.3/22 1/5,3/1
Part 4-Production and Trade A.4.1 (W) Industrial Production Index	2/9.3/15 1/12.2/9.3/15 1/5.1/26.2/9.3/1.3/8.3/22 1/5.1/26 1/12.2/16.3/15 1/12.2/16.3/15
Part 5-Foreign Trade and Balance of Payments A.5.1 (M) Exports and Imports	



Part 6-Prices A.6.1 (M) Consumer Price Index	1/12,2/16,3/8
Part 7-Construction A.7.1 (M) Housing Construction	
Part 8-Energy, Raw Materials, and Commodities A.8.1 (W) Distribution of Electric Power	
Part 9-Agriculture A.9.1 (M) Farm Income and Expenses	1/5,2/2,3/1
Part 10-Money and Credit A.10.1 (W) Money Stock Measures	
A.10.3 (M) Consumer Credit. A.10.4 (W) Common Stock Prices. A.10.5 (W) U.S. Government Securities. A.10.6 (M) Business Credit. A.10.7 (W) Interest Rates.	
Part 11-Indicators of Business Activity A.11.1 (M) Composite Index of Leading Indicators A.11.2 (M) New Business Incorporations	2/2
Part 12-Transportation A.12.1 (0) Commodity Transportation	

Section B-General Social Indicators

Part 1-Population	
B.1.1 Population Estimates	
(M)-Total Population	
(A)-Total Population by Age, Sex, Race	3/15
(A)-Rate of Growth	
(A)-Components of Change (Birth, Death,	
Net Immigration)	2/2,3/15
(A)-Abortions	,
(A)-Total Fertility	
(0)-Population Projections	
B.1.2 Population Distribution	
(0)-Population by Size of Place	
(O)-Population in Rural and Urban Areas	1/12
B.1.3 Migration	· / · -
(A)-Recent Movers	
(A)-Migration by Region	
(A) - wing ration by Region	
Part 2-The family	
B.2.1 Living Arrangements, Selected Characteristics	
	1/10 2/0
(A)-Age. Sex. and Race	1/19,3/8
(A)-Single Person Households	1 / 1 0
(A)-Children Living With Single Parents	1/19
(A)-Average Family Size	3/8
B.2.2 Family Formation and Dissolution	4 /40
(A)-Marital Status of the Population	1/19
(M)-Marriage and Divorce Rates	1/19,3/15
(A)-Marriages Ending in Divorce	
B.2.3 (0)-Attitudes Towards Family Life	
Part 3-Health	
B.3.1 Life Expectancy	
(A)-At Birth	
(A)-At Selected Ages	
(M,A)-Death Rates by Cause	3/15
(A)-Leading Causes of Death	
(M,A)-Infant Mortality	3/15
B.3.2 Morbidity	
_ (M)-Communicable Diseases	
(A)-Acute Illness	
B.3.3 Disability	
(0)-Days of Disability by Type	
(0)-Institutionalized Population	
(A)-Disability by Degree of Limitation	
and Cause	
(A)-Short-Term Disability	
B.3.4 Health Status	
-Nutrition	
(0) o Dietary Intake	
(0) o Clinical Measurements	
TO THE THE TAX TO SEE THE TENT OF THE TENT	
(O) Obesity	
(0) Obesity	
-Drugs	
-Drugs (M) o Dreg Deaths	
-Drugs	

(O)-Physical Fitness	
(A)-Physician and Dental Visits(A)-Costs and Expenditures	1/12
(A)-Facilities	.,
(A)-Personnel	
(0)-Attitudes Toward Health Care	
Part 4-Education	
B.4.1 Educational Achievement, Selected Characteristics	
(O)-Math, Science, Reading, Writing	
(0)-Music, Art, Literature, Citizenship B.4.2 Attainment	
(A)-High School Graduation Rate	
(A)-The High School Educated	
Population by Race and Sex	
(A)-College Educated Population	
by Race and Sox	
B.4.3 School Enrollment	
(A)-Primary and Secondary School	3/15
(A)-Preprimary by Age, Race, Income	
(A)-Modal Grade Enrollment by Sex. Race and Age.	
(0)-High School Students	
Expecting to go to College	•
(0)-College Entrance Rates by Sex.	
Race, and Socioeconomic Status	
(A)-College Enrollment	2/23
(O)-Participation in Adult Education	
B.4.4 Educational Facilities and Personnel	
(A)-Schools, Classrooms	
(A)-Teachers, Administrative, Others	
(0)-Expected Student Expenses.	
Higher Education	
(A)-Expenditures by Level of Government	
(A)-Primary and Secondary School	3/15
Part 5-Work	
B.5.1 Labor Force, Employment and Unemployment	
(A)-Labor Force Participation(A)-Part-time, Part-year Workers	
(A)-Employment by Occupation	
(M.A)-Unemployment	
(Q)-Discouraged Workers	
(A)-Labor Union Membership	
B.5.2 Earnings	
(A)-Median Earnings	
B.5.3 Working Conditions	
(A)-Regular and Overtime Hours	
<pre>(A)-Work Injuries by Occupation(0)-Time, Distance, and Mode of Transportation</pre>	
to Work	
B.5.4 Benefits	
(0)-Vacations, Holidays	
(A)-Benefit Plans	
B.5.5 Retirement	

(A)-Persons Retiring From Work(O)-Work Life Expectancy(A)-Retirement Benefits	
Part 6-Income, Consumption, and Wealth B.6.1 Income Levels	
(A)-Median Family Income(A)-Composition of Family Income(A)-Per Capita Income	2/2
B.6.2 Distribution of Income (A)-Age,Race, and Sex	
(A)-Regional Differences	2/2
B.6.4 Consumption (Q)-Personal Consumption Expenditures	2/2
B.6.5 Wealth (0)-Wealth and Net Worth of Consumer Units	
(0)-Composition of Wealth B.6.6 Consumer Borrowing and Debt (A)-Amount of Debt Outstanding	
(A)-Debt/Income Ratio	
(M)-Attitudes Toward Energy Use(Q)-Attitudes Toward the Economy	2/2
Part 7-Housing B.7.1 Housing Conditions (A)-Average Size of Households	
(A)-Households Lacking Selected Facilities, by Size, Race, Tenure, and Location	
B.7.2 Home Tenure (A)-Single Family Dwellings	
(A)-Condominiums and Other Multi- Unit Structures	1/5
B.7.3 Cost and Expenditures (A)-Average Mortgage Payments	1 /5
(A)-Upkeep and Maintenance	1/5
and the Community Part 8-Leisure and Recreation	
B.8.1 Use of Leisure Time	
Part 9-Public Safety B.9.1 Crimes Known to Police	
(Q,A)-Violent	1/5 1/5

Table of Contents-Continued (A)-Violent..... B.9.3(0) Fear of Crime, Selected Characteristics..... B.9.4 Police Activity (A)-Persons Arrested by Charge..... (A)-Offenses Cleared...... B.9.5 Judicial Activity (A)-Persons Sentenced for Federal Crimes...., B.9.6 Prisoners: Adults and Juveniles (A)-Prisoners by Sentence..... (A)-Average Length of Sentence...... (A)-Persons Executed and Sentenced to Death..... (A)-Average Prison Population..... B.9.7(A) Expenditures for Administration of Criminal Justice..... B.9.8 Selected Studies

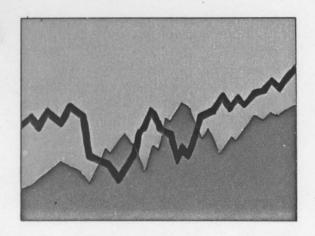
SECTION C-Government Activity
Part 1-Social Welfare and Security C.1.0 Social Welfare and Security-General
(M) -Benefits Paid
(M) -Blind
(M) -Recipients
(M) -Recipients
C.1.7 Food Stamps (M) -Recipients
(A) -Benefits
Part 2-Equal Opportunity C.2.1 Equal Employment Opportunity (A) -Minority Employment
C.2.2 School Desegregation (A) -Students Attending Predominantly Minority Schools
Part 3-Government Operation C.3.1 Federal Employment
(M) - Employees

SECTION D-Environment, Science, Culture Part 1-Environment D.1.1 Air Quality (A) -Amount of Pollutants Released Into the Atmosphere..... (A) -Ambient Air Quality, Nationwide, Major Cities..... (0) - Perceived Quality...... D.1.2 Water Quality (A) -Miles of Streams Meeting EPA Standards..... (A) -Oil Spills, Fish Kills....... (0) -Eutrophication of Lakes...... D.1.3(0) Hazardous Substances (A) - Amounts Produced...... (A) -Concentration in Biosphere..... D.1.4 Ecological Balances (A) -Endangered Species (Plant and Animal)..... (0) -Critical Areas (Coastal Zones)..... (A) -Land/People Density.....

Dank O. C	
Part 2-Science	
D.2.1 Professionals in Basic Research	
(A) -By Speciality	
(A) -Person Years of Scientists.	
Engineers Engaged in R&D	
D.2.2 Expenditures for Research and Development	
(A) -Private Industry	
(A) -Government	
D.2.3 Science Achievement in Schools	
(0) -Secondary Schools	
(0) -Higher Education	
D.2.4 Public Attitudes	
Toward Science and Technology	
,	
Part 3-Culture	
D.3.1 (0) Persons Employed in Artistic Profession	ıs
D.3.2 (0) Children's Skill and Appreciation of	
Literature, Arts, Music	
D.3.3 Participation in Cultural Activities	
(A) -Voluntary Organizations	
(A) -Travel	
(A) -Hobbies, Sports, Music, etc	
D.3.4 Attendance at Cultural Events	
(A) -Plays, Galleries, Motion Pictures	
(m) isayo, daries les, motion rictules	

SECTION E-Selected Subjects

E.O.1	(A)	-Spanish Origin Population	
E.0.2	(A)	-Metropolitan and Nonmetropolitan Population	
E.0.3	(0)	-Shareownership of Public Corporations	1/19
E.O.4	(0)	-Driver Licenses	1/19
E.0.5	(0)	-Trends in Employment of College and University	
	, ,	Graduates in Business and Industry	3/1



WEEKLY BRIEFING NOTES ON U.S. DOMESTIC DEVELOPMENTS



Prepared for the President and the Vice President

MARCH 29, 1976

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

Capacity Utilization

Board of Governors of the Federal Reserve System, "Capacity Utilization in Manufacturing" E.5; "Industrial Production and Related Data" G.12.3.

Exports and Imports

U.S. Department of Commerce, Bureau of the Census, "Highlights of Exports and Imports".

Balance of Payments

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

Heroin Indicators

U.S. Department of Health, Education, and Welfare, National Institute on Drug Abuse, "Heroin Indicators Trend Report."

Motor Vehicle Facts

Motor Vehicle Manufacturers Association of the United States, "1975 Automobile Facts and Figures."



TABLE OF CONTENTS

SERIES	4. PRANTO ANARAMA	WEEKLY	MONTHLY	QUARTERLY	ANNUAL	OTHER	
SECTION A—General Economic Indicators							
Part 1—National Income and Product A.1.1 Gross National Product A.1.2 Personal Income A.1.3 Corporate Profits A.1.4 Federal Receipts and Expenditures A.1.5 Business Investment			x	x x x x			
Part 2—Employment and Unemployment A.2.1 Unemployment Rate A.2.2 Duration of Unemployment A.2.3 Unemployment Insurance A.2.4 Labor Turnover A.2.5 Help Wanted Index		×	x x x				
Part 3—Hours, Earnings, and Productivity A.3.1 Average Workweek, Manufacturing A.3.2 Compensation Per Man-Hour A.3.3 Productivity Indexes A.3.4 Real Earnings A.3.5 Work Stoppages			x x x	x			
Part 4—Production and Trade A.4.1 Industrial Production Index A.4.2 Production of Primary Metals A.4.3 Production and Sales of Transportation Equipment A.4.4 Manufacturers' Shipments, Inventories, and Orders		×	X X X				
A.4.5 Capacity Utilization A.4.6 Retail Sales			X X X	X			
Part 5—Foreign Trade and Balance of Payments A.5.1 Exports and Imports A.5.2 Manufacturers' Export Sales and Orders of Durable (A.5.3 Balance of Payments	Goods		X	X			
A.5.4 Foreign Travel Part 6—Prices A.6.1 Consumer Price Index A.6.2 Wholesale Price Index A.6.3 Tuesday Spot Market Price Index		×	××		×		

	i, j	_	۲	ERLY			
SERIES	The same and the same of the s	WEEKLY	MONTHLY	QUARTERLY	ANNUAL	OTHER	
SECTION A—General Economic Indicators (Con	tinued)	≥	Σ	ਠ	A	0	
Part 7—Construction A.7.1 Housing Construction			X				
Part 8—Energy, Raw Materials, and Commodities A.8.1 Distribution of Electric Power		×	x				
Part 9—Agriculture A.9.1 Farm Income and Expenses			x				
Part 10—Money and Credit A.10.1 Money Stock Measures A.10.2 Bank Reserves A.10.3 Consumer Credit A.10.4 Common Stock Prices A.10.5 U.S. Government Securities A.10.6 Business Credit A.10.7 Interest Rates		X X X	x				
Part 11—Indicators of Business Activity A.11.1 Composite Index of Leading Indicators A.11.2 Number of New Business Incorporations A.11.3 Number of Business Failures		; ; ,	X X X				
Part 12 - Transportation					<u> </u>		
A.12.1 Land						X	
SECTION B—General Social Indicators							
Part 1—Population							
B.1.1 Population Estimates — Total Population			×	X X X X			
B.1.2 Population Distribution — Population by Size of Place				XX			
B.1.3 Migration — Recent Movers — Migration by Region				X X			

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SERI	ES	OEERALD.	BRARL	WEEKLY	MONTHLY	QUARTERLY	ANNUAL	OTHER	
SECT	TION B—General Social Indicators (Continued)								
Part 2 B.2.1	-The Family Living Arrangements, Selected Characteristics								
	 Age, Sex, and Race Single-Person Households Children Living With Single Parents Average Family Size 						X X X		
B.2.2	Family Formation and Dissolution — Marital Status of the Population				×		x		
B.2.3	Attitudes Towards Family Life							X	
Part 3	—Health								
B.3.1	Life Expectancy — At Birth — At Selected Ages — Death Rates by Cause — Leading Causes of Death — Infant Mortality				x		X X X X		
B.3.2	Morbidity — Communicable Diseases				x		x		
B.3.3	Disability — Days of Disability by Type						×	x	
B.3.4	Health Status - Nutrition • Dietary Intake • Clinical Measurements - Obesity - Drugs							×××	
	 Drug Deaths Drug Abuse Episodes Liquor Consumption Smoking Physical Fitness 					X	X	x	
	- Perceived Health Status							X	1

SERI	ES	WEEKLY	MONTHLY	QUARTERLY	ANNUAL	отнек	
SECT	TON B—General Social Indicators (Continued)						
B.3.5	Health Care Delivery — Physician and Dental Visits — Costs and Expenditures — Facilities — Personnel — Attitudes Towards Health Care				X X X	×	
Part 4	-Education						
B.4.1	Educational Achievement by Sex, Race, Socioeconomic Status, Region — Math, Science, Reading, Writing					X X	
B.4.2	Attainment — High School Graduation Rate				X X X		
B.4.3	School Enrollment — Primary and Secondary School — Preprimary by Age, Race, Income — Modal Age Enrollment by Sex, Race — High School Students Expecting to go to College — College Entrance Rates by Sex, Race, Socioeconomic Status — College Enrollment — Participation in Adult Education				x x x	X X	
B.4.4	Educational Facilities and Personnel — Schools, Classrooms				X X		
B.4.5	Costs and Expenditures — Expected Student Expenses, Higher Education				×	x	
Part 5	–Work						
B.5.1	Labor Force, Employment, and Unemployment — Labor Force Participation, Selected Characteristics — Part-time, Part-year Workers, Selected Characteristics — Employment by Occupation, Selected Characteristics — Unemployment, Selected Characteristics — Discouraged Workers — Labor Union Membership		x	×	X X X X		
B.5.2	Earnings — Median Earnings, Selected Characteristics				x		

SERI	ES	WEEKLY	MONTHLY	QUARTERLY	ANNUAL	ОТНЕВ	
SECTION B—General Social Indicators (Continued)				J		0	
B.5.3	Working Conditions — Regular and Overtime Hours, Selected Characteristics				X X	x	
B.5.4	Benefits — Vacations, Holidays				x	x	
B.5.5	Retirement — Persons Retiring From Work				x x	x	
Part 6-	Income, Consumption, and Wealth						
B.6.1	Income Levels — Median Family Income				X X X		
B.6.2	Distribution of Income - Age, Race, and Sex				X X		
B.6.3	Poverty				х		
B.6.4	Consumption — Personal Consumption Expenditures			x	x		
B.6.5	Wealth — Net Worth of Consumer Units					X X	
B.6.6	Consumer Borrowing and Debt - Amount of Debt Outstanding				X X		
B.6.7	Consumer Attitudes			х			
	-Housing						
B.7.1	Housing Conditions — Average Size of Households				x		
	and Location				X		

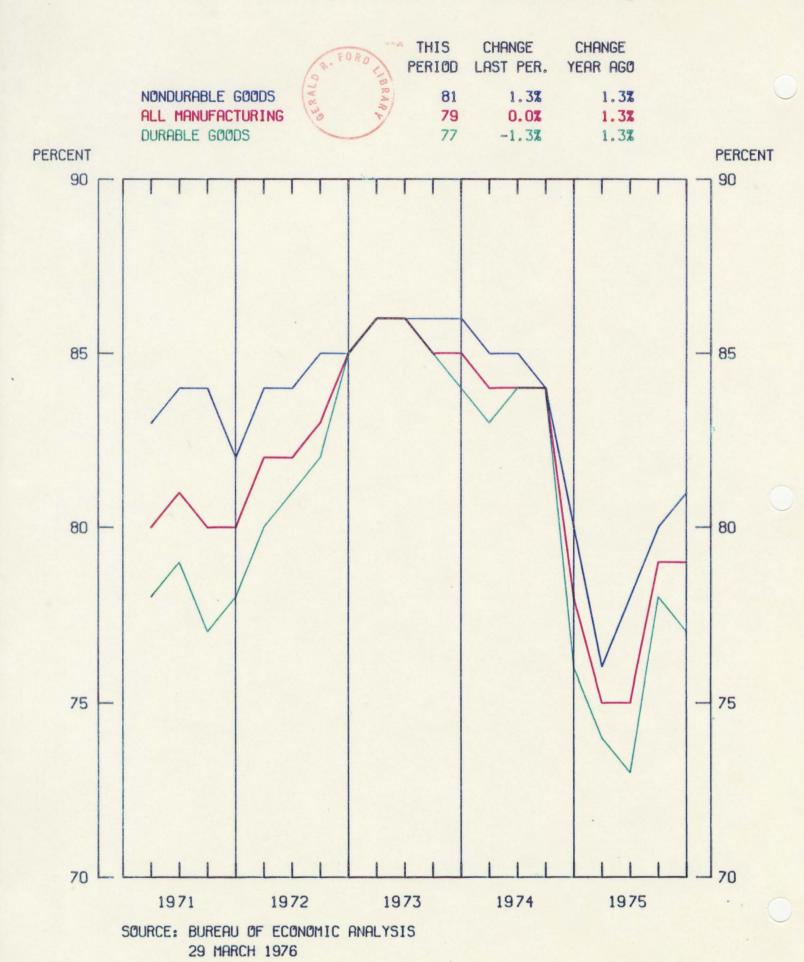
SERIES			WEEKLY	MONTHLY	QUARTERLY	ANNUAL	ОТНЕВ
SECTION I	B—Socioeconomic Series (Continued)	Contract to Colombia Seguera					
— Sin- — Mo . — Cor	Tenure gle Family Dwellings bile Homes ndominiums and Other Multiunit Structures cation Homes	• • • • • • • • • • • • • • • • • • • •				X X X	
— Ave — Upl	and Expenditures erage Mortgage Payments					X X X	
B.7.4 Attitu	ides Towards Housing and the Community						х
Part 8—Leisu	re and Recreation						
B.8.1 Use o	f Leisure Time						х
	ation door (Social, Active Sports, etc.) oor (Television, Visiting, Other)					x	X X
Part 9-Public	: Safety						
– Vio	s Known to Police lent perty				X X	X	
– Vio	ns of Crime, Selected Characteristics lent perty					X X	
B.9.3 Fear o	of Crime, Selected Characteristics						x
- Pers	Activity sons Arrested by Charge enses Cleared					X	
	al Activity ons Sentenced for Federal Crimes					X	
B.9.6 Prison — Pris — Ave — Pers	ers, Adults and Juveniles oners by Sentence					X X X	
B.9.7 Expen	ditures for Administration of Criminal Justice					X	
B.9.8 Select	ed Studies						

SERIES SECTION C—Government Activity	WEEKLY	MONTHLY	QUARTERLY	ANNUAL	OTHER
Part 1—Social Welfare and Security					
C.1.1 Social Security (OASDHI) — Current Beneficiaries — New Beneficiaries — Average Payment		X X X			
C.1.2 Old Age Assistance - Benefits Paid		X X			
C.1.3 Aid to the Disabled — Blind		X X X			
C.1.4 Aid to Families With Dependent Children — Recipients		X X			
C.1.5 Unemployment Insurance Coverage — Benefits Paid		X X			
C.1.6 Housing Assistance — Recipients		X X			
C.1.7 Food Stamps — Recipients — Benefits		X X			
C.1.8 Aid to Disaster Victims — Recipients — Benefits				X	
C.1.9 Veterans Benefits — Recipients		x x			
Part 2—Equal Opportunity					
C.2.1 Equal Employment Opportunity — Minority Employment	Andrewson and the second and the sec			X X	
C.2.2 School Desegregation — Students Attending Predominantly Minority Schools				X	

	TION C—Government Activity (Continued)	WÉEKLY	MONTHLY	QUARTERLY	ANNUAL	OTHER.
C.3.1	-Government Operation Federal Employment					
0.5.1	- Employees		X X			
C.3.2	State and Local Employment and Finances — Employees		X X			
SECT	ION D—Environment, Science, Culture					
Part 1	-Environment			ŕ		
D.1.1	Air Quality — Amount of Pollutants Released Into the Atmosphere				X X	x
D.1.2	Water Quality — Miles of Streams Meeting EPA Standards				X X	
D.1.3	Hazardous Substances — Estimated Amounts Produced — Concentration in Biosphere				X X	
D.1.4	Ecological Balances — Endangered Species (Plant and Animal)				x	x
	- Land/People Density				X	
Part 2-	-Science					
D.2.1	Professionals in Scientific Fields					
	By Specialty Person Years of Scientists, Engineers Engaged in R&D				X X	
D.2.2	Expenditures for Research and Development — Private Industry — Government				X X	
D.2.3	Science Achievement in Schools — Secondary Schools					x x

SERII	ES RAPE	WEEKLY	MONTHLY	QUARTERLY	ANNUAL	OTHER
SECT	ION D—Environment, Science, Culture	\$	2	0	A	0
D.2.4	Public Attitudes Towards Science and Technology				X	1
Part 3-	-Culture					
D.3.1	Persons Employed in Artistic Professions — By Type					×
D.3.2	Children's Skill and Appreciation of Literature Arts, Music					X
D.3.3	Participation in Cultural Activities - Voluntary Organizations				×	x
D.3.4	Attendance at Cultural Events — Plays, Galleries, Motion Pictures — Concerts, Museums, etc.				×	
SECT	ION E—Selected Subjects					
	Motor Vehicle Facts				X	

A.4.5 - Capacity Utilization in Manufacturing





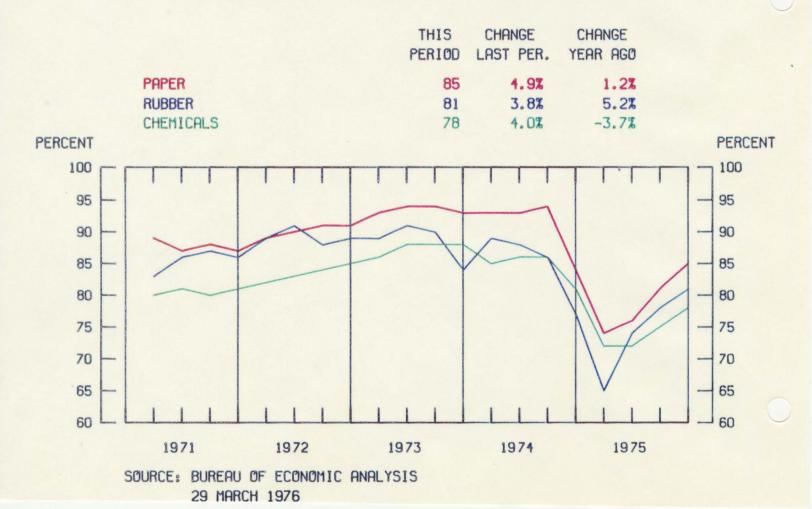
- Manufacturing Capacity Utilization leveled off at 79 percent during the last quarter of 1975.
 - •This was a 5-percent rise above the March and June 1975 rates, but 9 percent below the peak recorded in the first and second quarters of 1973.
 - A 1.3-percent gain in Capacity Utilization by Nondurable Goods Industries was nullified by a 1.3-percent decline in Durable Goods Industries.

A.4.5 - Capacity Utilization in Manufacturing

Components of Durable Goods Industries

* .			THIS PERIOD	CHANGE LAST PER.	CHANGE YEAR AGO	Q. FORO
	MOTOR VEHICLE PRIMARY METAL MACHINERY EX	LS CEPT	87 69 81	-6.5% -6.8% -3.6%	24.3% -15.9% -6.9%	O TRAPA
PERCENT	ELECTRI	CAL				PERCENT
125					1	125
110						110
95 —		_/		A		95
80 —		7	1		1	80
65					LY	65
	1971	1972	1973	1974	1975	

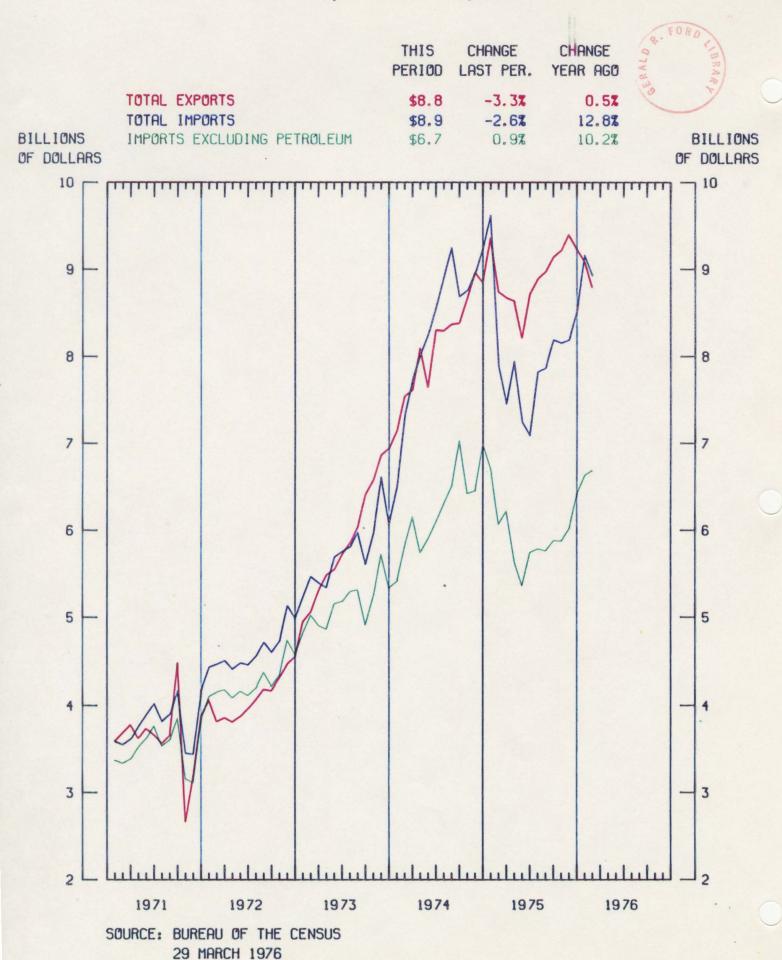
Components of Nondurable Goods Industries



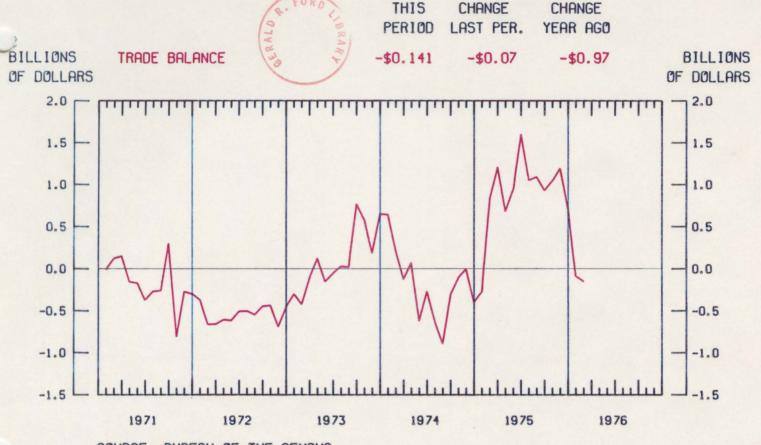


- Among Durable Goods Industries, the largest declines in fourth quarter operating rates were reported in Primary Metals and Motor Vehicles, down 6.8 percent and 6.5 percent, respectively.
 - •The rate for Nonelectrical Machinery decreased 3.6 percent.
 - In contrast to Primary Metals and Nonelectrical Machinery, Motor Vehicle Capacity Utilization for the fourth quarter of 1975 is operating well above the rate for the same quarter of 1974.
- Among Nondurable Goods Industries, Paper, Chemicals, and Rubber recorded the largest increases.
 - However, the rate of growth in Capacity Utilization slowed from the third quarter for all three industries.

A.5.1 - Exports and Imports



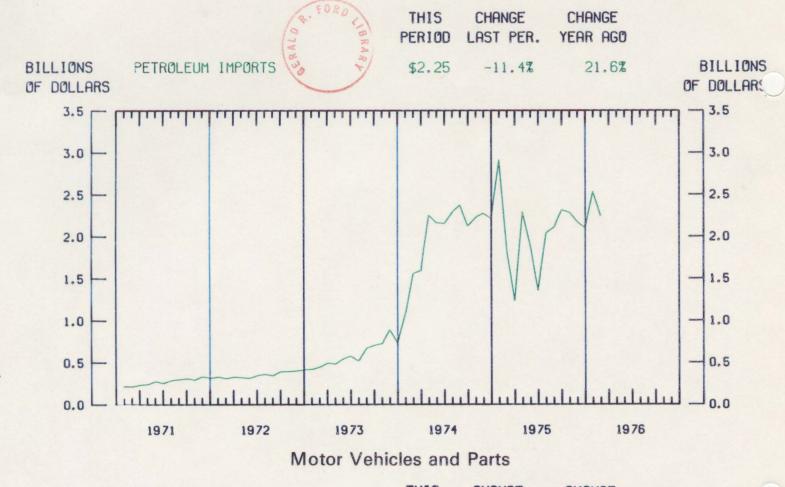
A.5.1 - Merchandise Trade Balance (Excluding Military Assistance)

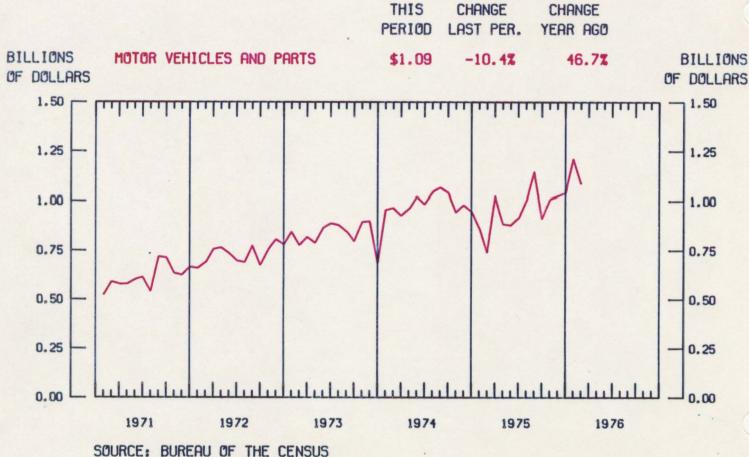


SOURCE: BUREAU OF THE CENSUS 29 MARCH 1976

- Total Imports exceeded Total Exports by a seasonally adjusted \$140.8 million in February, almost doubling January's Merchandise Trade Balance deficit.
 - The second deficit in a row followed 11 consecutive months of surplus.
- Total Exports declined for the third month in a row, down \$303.4 million, or 3.3 percent.
 - Spurred by a \$235.6 million drop in Exports of Agricultural Commodities, the February decline was the largest since last May's 4.9-percent decrease.
- Imports declined for the first time since October, but not as sharply as Exports, down 2.6 percent, or \$237.1 million.
 - · Petroleum and Auto Imports dropped.
 - Imports Excluding Petroleum rose more slowly than in recent months, up 0.9 percent, or \$61.2 million compared to a \$220.3 million rise in January.

A.5.1 - Imports
Petroleum and Petroleum Products





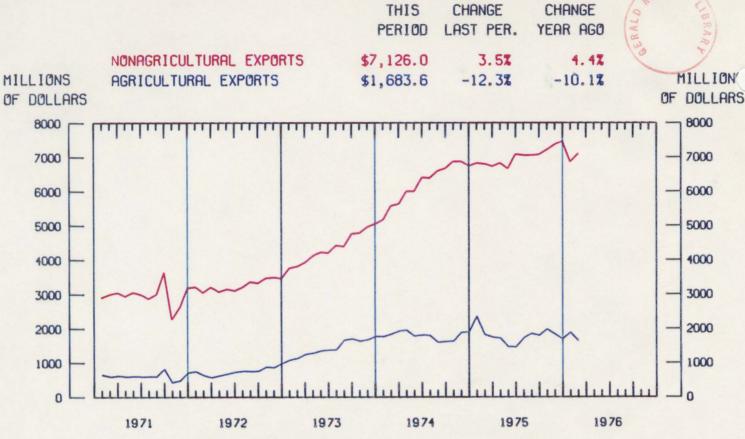
29 MARCH 1976



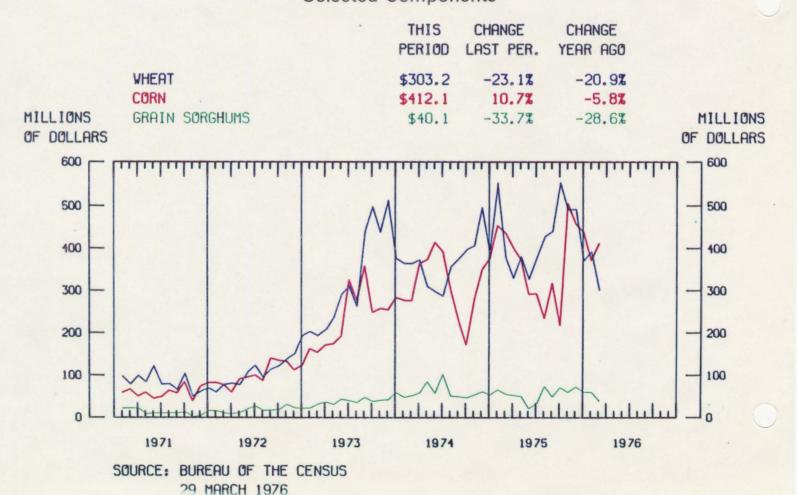
- Contributing to the decline in Total Imports was a \$296.3 million drop in Petroleum Imports, a sharp contrast to the \$430 million gain posted in January.
 - Up 21.6 percent from February 1975 when Petroleum Imports were valued at \$1.85 billion.
- Imports of Motor Vehicles and Parts declined in February, down 10.4 percent, or \$126.4 million, erasing about two-thirds of January's \$171.5 million gain.

A.5.1 - Exports

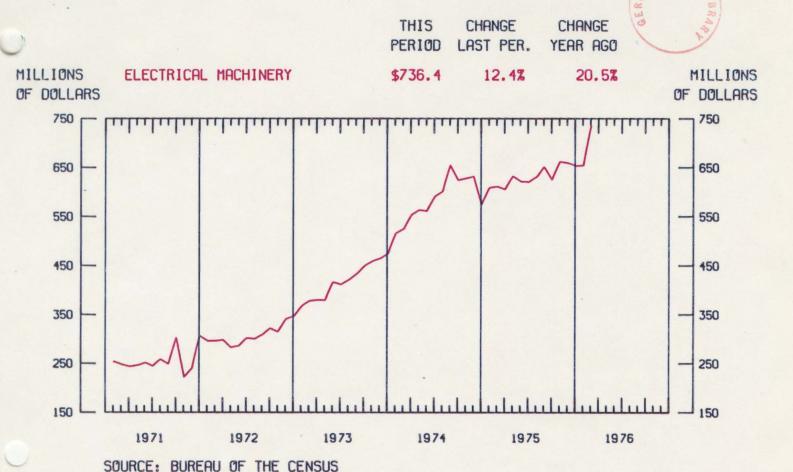
Nonagricultural and Domestic Agricultural Commodities



Exports of Domestic Agricultural Commodities
Selected Components



A.5.1 - Exports of Nonagricultural Commodities
Electrical Machinery



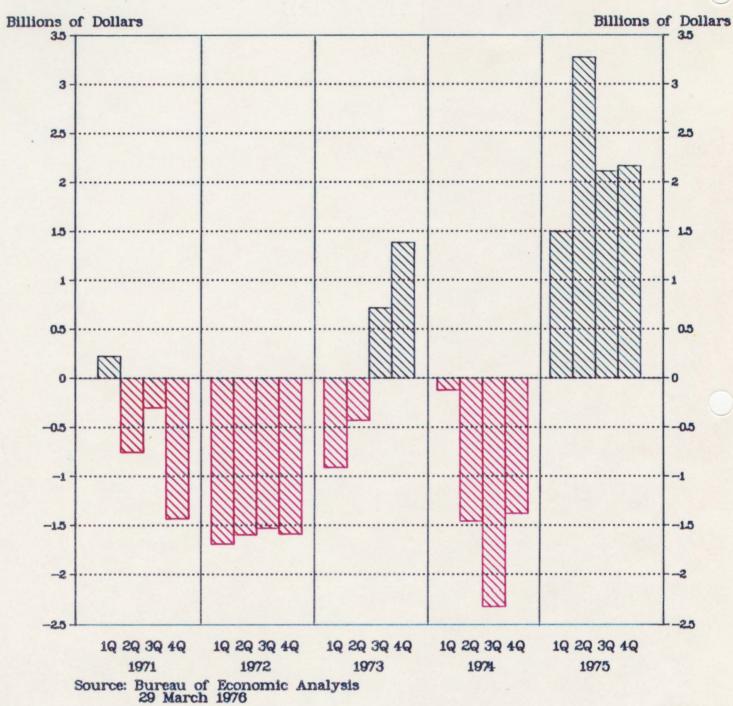
• Agricultural Exports declined \$235.6 million, or 12.3 percent, the largest drop since last May when a \$249.4 million decline was posted.

29 MARCH 1976

- Wheat and Grain Sorghums posted the steepest declines, down \$91.1 million and \$20.4 million, respectively; and more than off-set a \$39.7 million rise in Corn Exports.
- Exports of Nonagricultural Commodities recovered somewhat from January's \$603.9 million decline, rising 3.5 percent, or \$238.5 million.
 - Exports of Electrical Machinery rose sharply in February, up \$81.1 million, or 12.4 percent.

A.5.3 - Merchandise Trade Balance

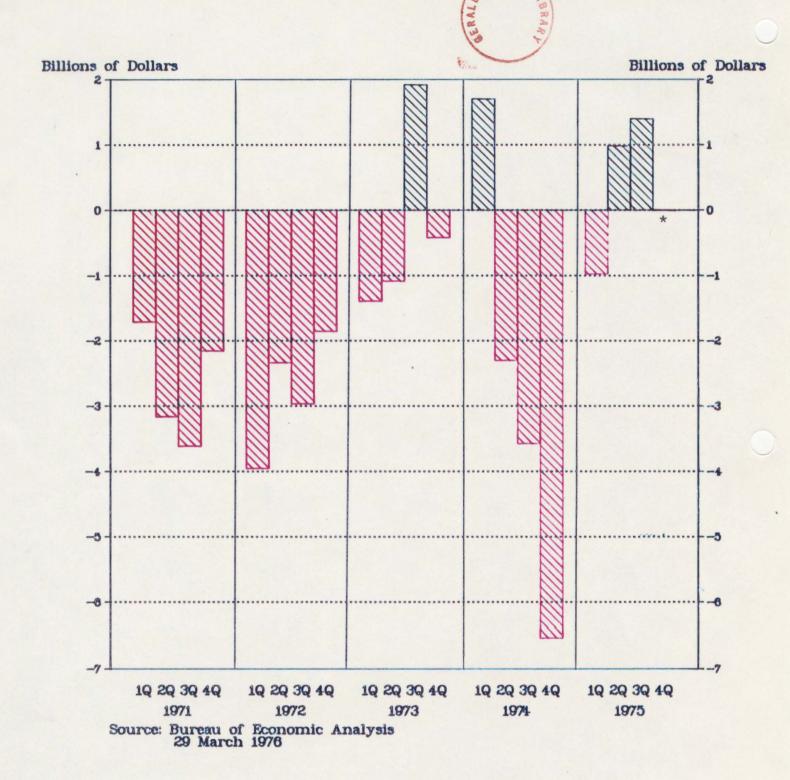






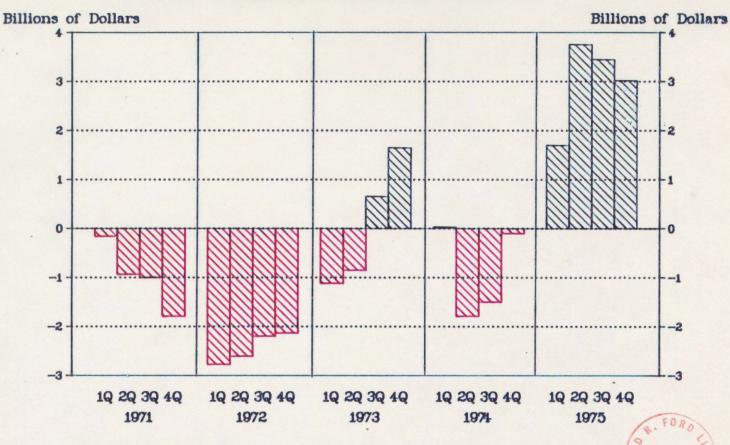
- *The Merchandise Trade Balance registered a small increase of \$0.1 billion to a total of \$2.2 billion in the fourth quarter.
 - *Although substantially below the record high of \$3.3 billion recorded in the second quarter, the 1975 fourth quarter level is a marked improvement over the deficit of \$1.4 billion in the last quarter of 1974.
- For the year 1975, the Merchandise Trade Balance swung from a deficit of \$5.3 billion to a surplus of \$9.0 billion.
 - The shift of \$14.3 billion resulted from an increase of \$8.9 billion in exports and \$5.4 billion decline in imports.

A.5.3 - Balance on Current Account and Long-Term Capital



^{*}Deficit of \$4 million in the fourth quarter.

A.5.3 - Balance on Current Account



Source: Bureau of Economic Analysis 29 March 1976

- Despite a shift from a \$1.4 billion surplus in the third quarter to a slight deficit of \$4 million in the fourth quarter, the U.S. Balance of Payments on Current Account and Long-Term Capital registered a \$1.4 billion surplus for all of 1975—the first annual surplus since the United States began recording this basic international transactions measure in 1960.
 - A marked improvement over the \$6.5 billion deficit recorded in the fourth quarter of 1974 and the \$10.7 billion imbalance for all of 1974.
 - The \$4 million deficit was primarily the result of a \$1.1 billion increase in direct foreign investment by U.S. companies.
- The Balance on Current Account declined 12.4 percent to \$3.0 billion in the fourth quarter.
 - For the year 1975, a surplus of \$11.9 billion was registered; a shift of \$15.3 billion from the deficit of \$3.4 billion in 1974.

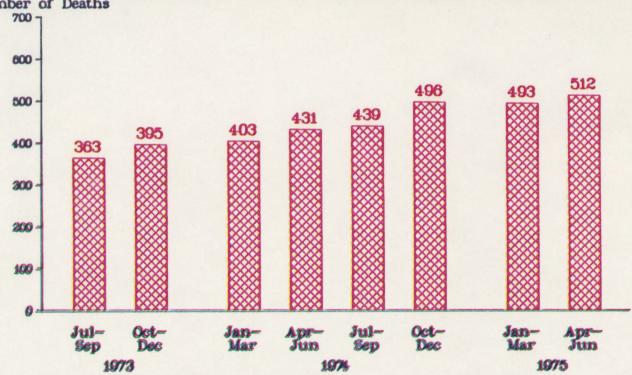


Heroin Indicators Trend Report

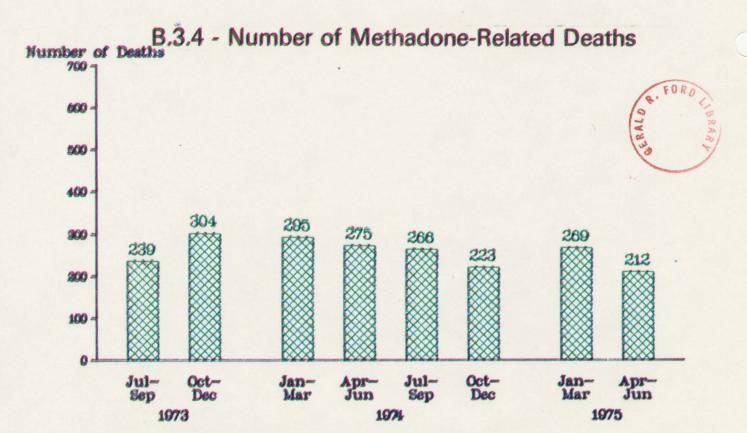
Data is not available concerning the actual numbers of heroin users. The information utilized in this report has been collected from a variety of data sources which are generally considered to have an association with trends in drug use. The absolute nature of this association between drug use and the indicators is not known, and as a result, the indicators should be viewed as relative measures of change rather than absolute measures.

Based on the reported indicators which follow, it seems apparent that heroin use has been increasing at a slow but relatively constant rate since mid-1973.

Number of Deaths B.3.4 - Number of Heroin-Related Deaths



Source: National Institute on Drug Abuse 29 March 1976



Source: National Institute on Drug Abuse 20 March 1976

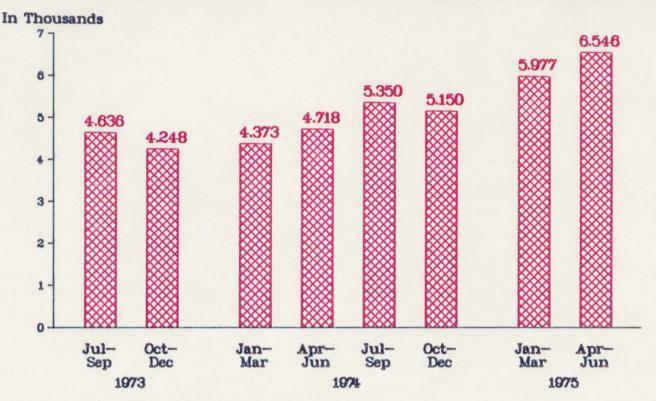


The number of heroin-related deaths and methadone-related deaths are based on data reported to the Drug Abuse Warning Network (DAWN), an information and intelligence system funded jointly by the National Institute on Drug Abuse (NIDA) and the Drug Enforcement Administration (DEA). The data are raw numbers based on reports from June 1973 through June 1975 from approximately 100 medical examiners located in 24 metropolitan areas throughout the United States. Methadone-related death data are included since it represents the largest group of narcotic-related deaths excluding heroin.

An increase in the number of active heroin users in the Nation is thought to result in an increase in the number of fatal reactions to the drug.

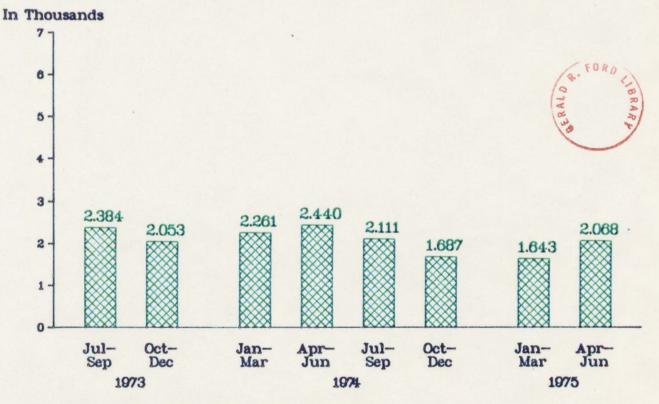
- Heroin-related deaths have been generally rising upwards in the past 2 years.
 - More than 20 percent more deaths were recorded in the first half of 1975 than in the first half of 1974.
- Over the same period, the number of methadone-related deaths has been decreasing somewhat despite a sharp increase in the first quarter of 1975.

B.3.4 - Number of Heroin-Related Emergency Room Episodes



Source: National Institute on Drug Abuse 29 March 1976

Number of Methadone-Related Emergency Room Episodes



Source: National Institute on Drug Abuse 29 March 1976

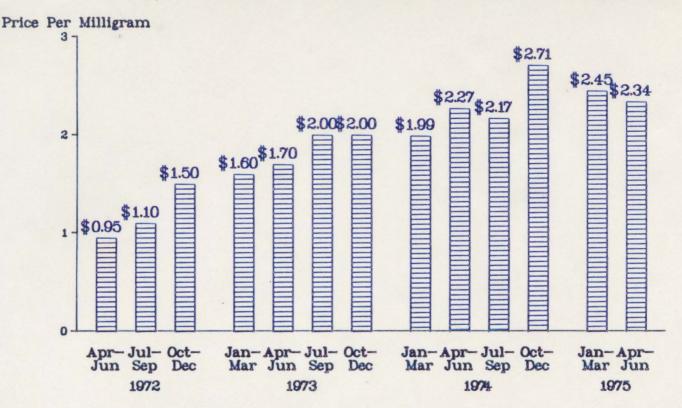


The number of heroin- and methadone-related emergency room episodes is based on data reported to DAWN. The data are drawn from reports submitted by more than 800 emergency rooms throughout the country.

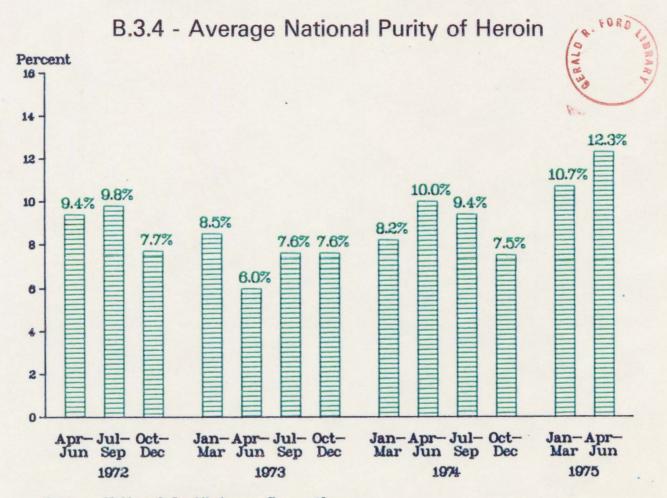
Similar to drug-related deaths, the number of nonfatal reactions to heroin is thought to increase as the number of heroin users increases.

- There has been a relatively steady increase in the number of heroinrelated emergency room episodes, again indicating that overall drug usage is increasing.
 - Episodes in the first half of 1975 have risen almost 40 percent over the same period in 1974 to a level of more than 6,500.
- Methadone-related emergency room episodes were on the decline until a 25-percent increase in the second quarter 1975 again brought the total number of episodes above 2,000.

B.3.4 - National Average Retail Price of Heroin



Source: National Institute on Drug Abuse 29 March 1976



Source: National Institute on Drug Abuse 29 March 1976



Data on heroin price and purity are based on the Drug Enforcement Administration's STRIDE (System to Retreive Information from Drug Evidence) and on analysis developed by the Institute for Defense Analyses. STRIDE is a system in which drugs purchased by DEA field agents are submitted to a DEA forensic chemist for quantitative and qualitative analyses. Results of these analyses along with data concerning the amount of money involved in the purchase are then used to calculate average price and purity. The data presented represent retail (or street-level) purchases defined as purchases costing \$100 or less.

Generally, an increase in the average purity and a decrease in the average retail price of street-level heroin indicates greater availability and is usually associated with an increase in heroin use.

- Following a generally upward trend from 1972 to 1974, the national average retail price per milligram of heroin has declined 14 percent in the first 2 quarters of 1975.
- The average national purity of heroin rose to a high of 12.3 percent in the second quarter of 1975.
 - More than double the second quarter 1973 low of 6 percent.
- Thus, both of these indicators support the conclusion that drug usage has increased significantly.

B.3.4 - Number of State and Local Arrests for Heroin and Cocaine

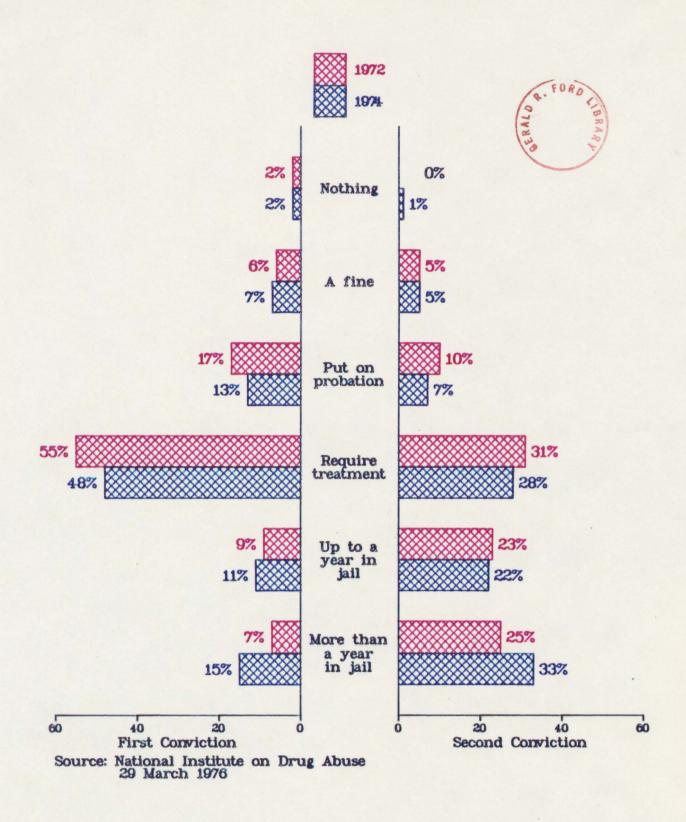




The number of arrests by State and local law enforcement authorities for drug law violations is thought to bear a relationship to overall drug use in the Nation. It is assumed that as drug-related activity increases, public concernalso increases, resulting in more law enforcement activity and a greater number of arrests for drug-related offenses.

- The rate of arrests for heroin and cocaine made by local and State enforcement officials increased substantially through 1971, reaching a peak level of 73,700 in 1971.
- After declining a total of 41 percent from 1971 to 1973, State and local drug law arrests jumped almost 25 percent in 1974.

B.3.4 - Attitudes Toward Heroin Offenses

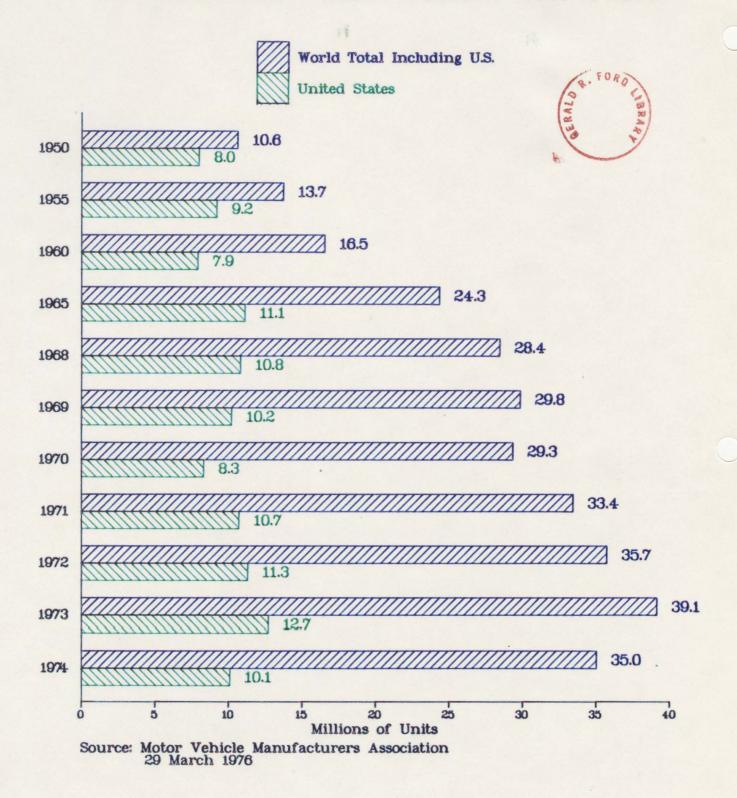




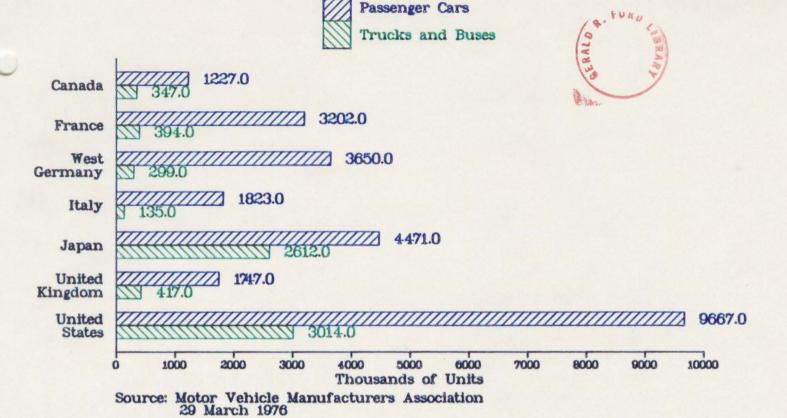
In a separate report, the National Institute on Drug Abuse reports that attitudes towards use or possession of heroin have hardened from 1972 to 1974.

- There was a notable shift towards more severe treatment of people convicted of possessing or using heroin.
 - 15 percent of adults now regard jail sentences of over a year as appropriate for a first conviction for possession and 33 percent regard such sentencing for a second conviction.
- In 1974, 26 percent of adults would have required some jail term for a first conviction compared to only 16 percent 2 years earlier.
- Although the majority response for a first conviction is still "to require treatment" without jail, this has dropped 7 percentage points since 1972.

E.6 - World Motor Vehicle Production: 1950 to 1974

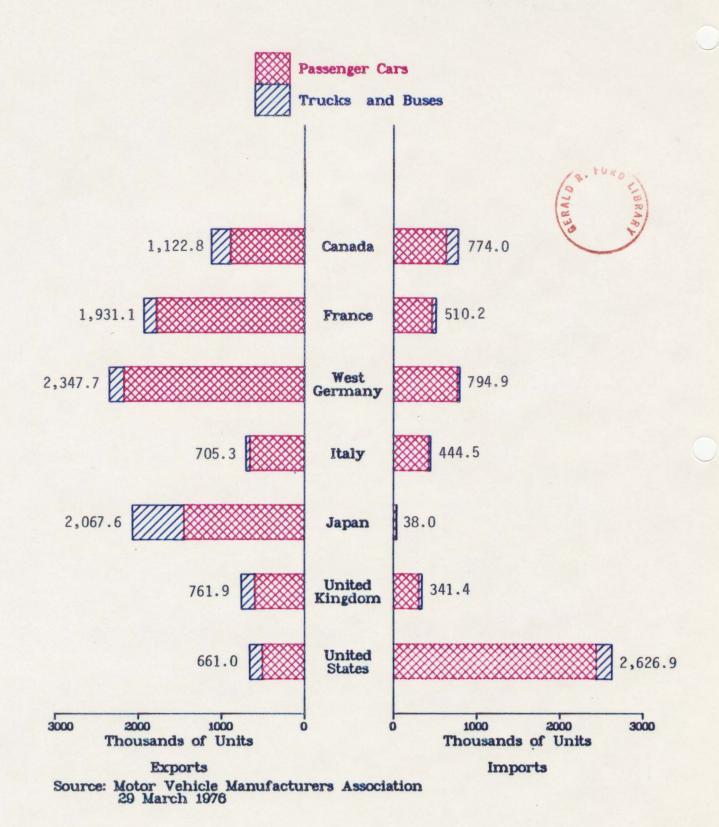


E.6 - Motor Vehicle Production by Country: 1973 Leading Producers



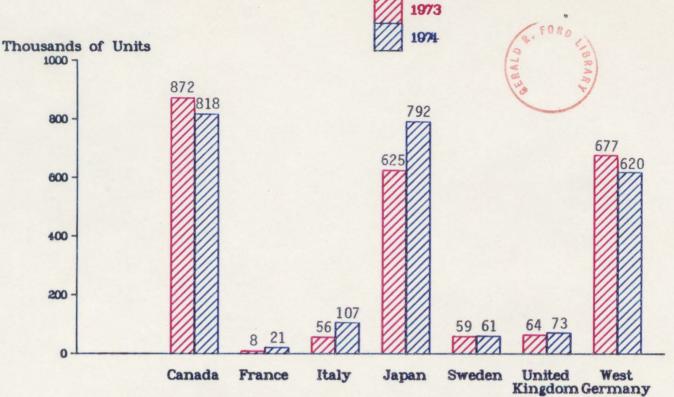
- World Motor Vehicle Production declined in 1974, down 10.5 percent from the record 39.1 million units produced in 1973.
 - Since 1950, World Motor Vehicle Production has more than tripled.
 - While the United States remains the single largest manufacturer of Motor Vehicles accounting for nearly a third of the world-wide total in 1973, the fastest rates of growth in Total Production have occurred outside the U.S.
- In 1973, Passenger Cars accounted for approximately 77 percent of Total Motor Vehicle Production.
 - The United States total of 9.7 million Passenger Cars was more than double the output of the nearest competitor, Japan.

E.6 - Exports and Imports of Motor Vehicles: 1973
Selected Countries



E.6 - U.S. Passenger Car Imports

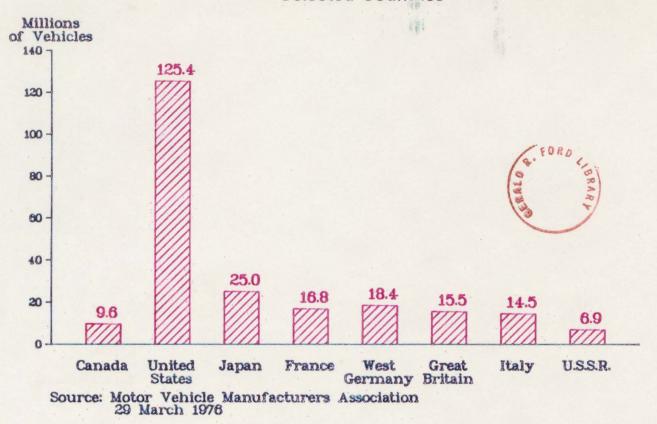
By Country of Origin: 1973 and 1974



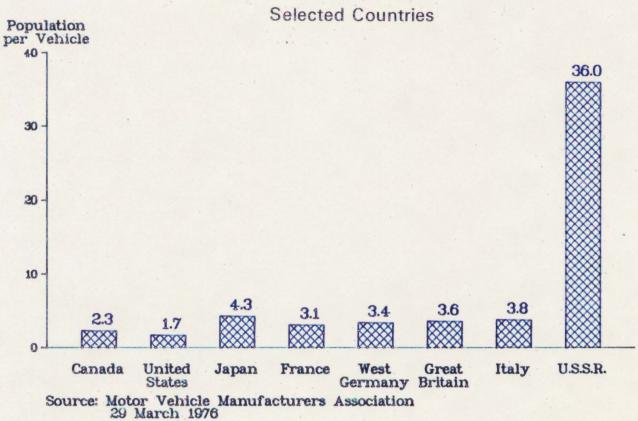
Source: Motor Vehicle Manufacturers Association 29 March 1976

- In 1973, West Germany was the leading exporter of motor vehicles:
 - Japan was the <u>leading exporter of trucks</u>, 617,000, more than twice as many as Canada, the nearest competitor.
 - Canada exported 71 percent of its total production in 1973--more than four-fifths, or 985,000 units, of which were shipped to the United States.
 - France and West Germany each exported more than half of their total 1973 production.
 - Canada was the largest customer for U.S. passenger car exports, importing about 90 percent of our total exports of 509,000.
- In addition to being the largest producer of motor vehicles in 1973, the U.S. was also the largest importer, over three times as many as West Germany and Canada, and about four times as many as we exported.
 - Canada, West Germany, and Japan accounted for approximately 90 percent of the 2.4 million passenger cars imported by the U.S.

E.6 - World Motor Vehicle Registrations: 1973
Selected Countries



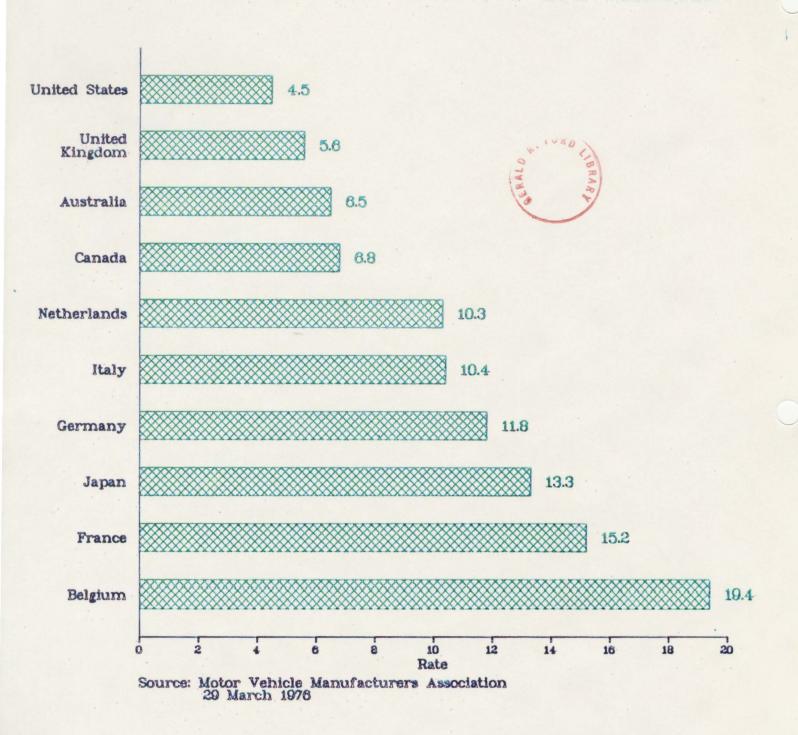
E.6 - Population Per Vehicle: 1973





- World Motor Vehicle Registrations totaled 296 million in 1973, an increase of 19 million over 1972.
 - The United States accounted for 42.3 percent of total registrations in 1973.
 - Passenger Car registrations totaled 101.8 million units, or 81 percent of the U.S. total.
- In the United States, there were 1.7 persons for each registered vehicle. Canada was a close second with a ratio of 2.3.
 - Although the U.S.S.R. had the eighth largest number of registered vehicles, the ratio of persons to vehicles was more than 20 times that of the U.S.

E.6 - Traffic Fatality Rate Per 100 Million Vehicle Miles: 1972

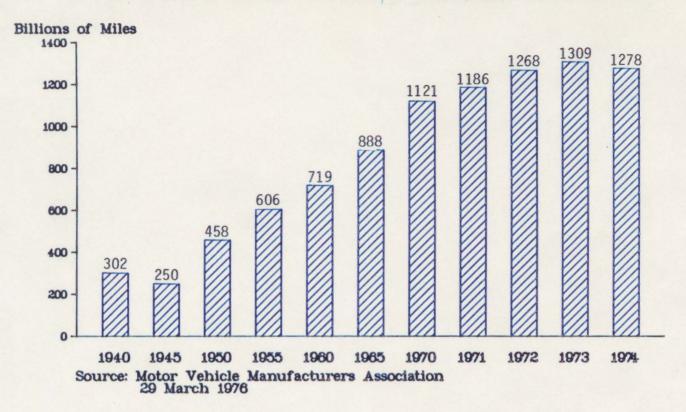




- The United States continued to have the lowest traffic fatality rate* of any nation, 4.5 deaths per 100 million vehicle miles in 1972.
 - The next lowest rate of 5.6 deaths was recorded in Great Britain, with Belgium the highest of all reporting countries at 19.4 per 100 million vehicle miles.
 - The U.S. rate declined even further in 1973 and 1974--4.3 deaths in 1973 and 3.6 deaths in 1974, the lowest in U.S. history.

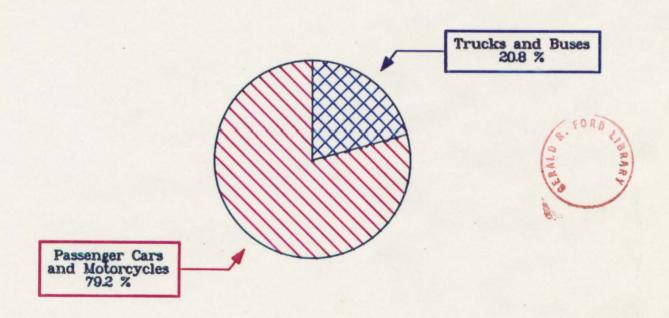
*Based on deaths occurring within one year after the accident.

E.6 - Motor Vehicle Miles Traveled in the U.S.: 1940 to 1974



E.6 - Percent of Vehicle Miles Traveled

By Mode of Transportation: 1973

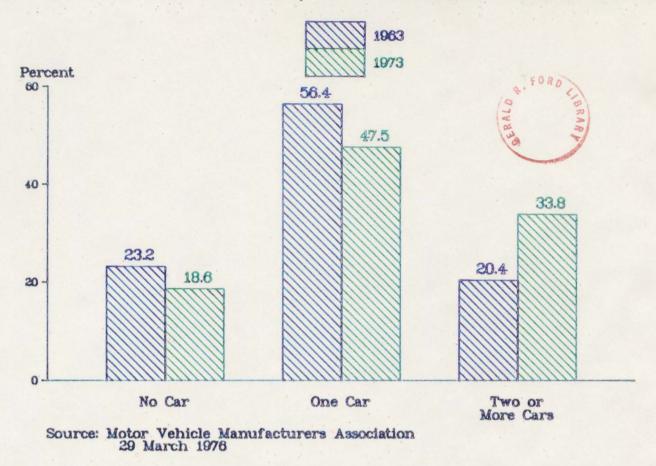


Source: Motor Vehicles Manufacturers Association 29 March 1976

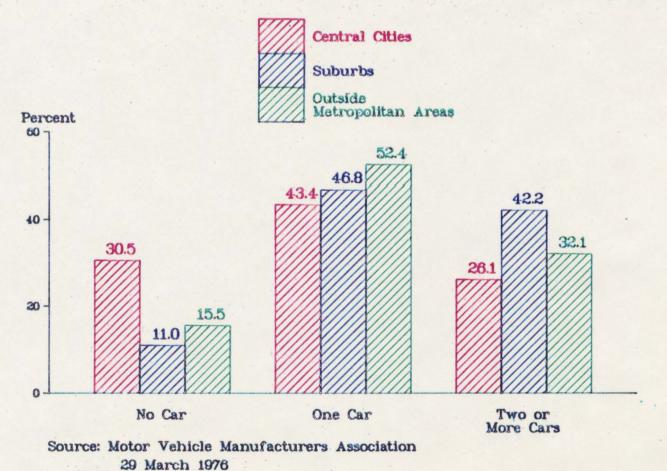


- Total Vehicle Miles Traveled declined 2.3 percent in 1974 from the 1973 total of 1,308.6 billion miles, the equivalent of 52 million trips around the world.
 - Approximately 54 percent, or 707.4 billion miles, of total motor vehicle travel in 1973 was on urban streets and highways.
- Passenger Cars accounted for the largest share of motor vehicle travel, 1.0 trillion miles in 1973, or about 78 percent.
 - Motorcycles traveled 19.6 billion miles, or 1.5 percent, a four-fold increase since 1965.
- Trucks (cargo vehicles) logged 267.1 billion miles, about one-fifth of total travel.
 - Buses (school and commercial) accounted for only 0.4 percent of vehicle miles traveled.

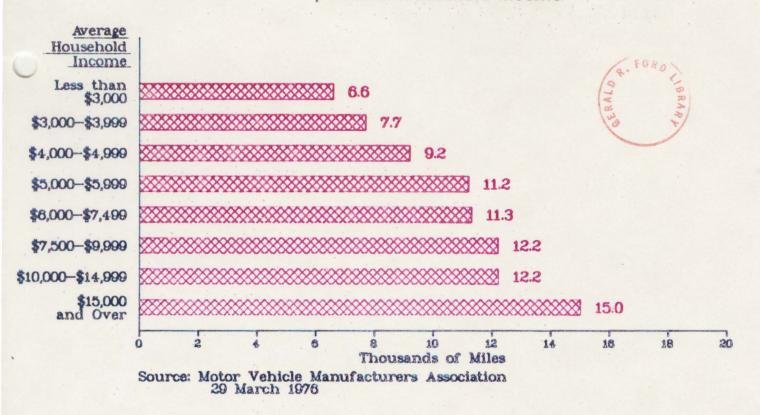
E.6 - Household Ownership of Automobiles: 1963 and 1973



E.6 - Household Ownership of Automobiles by Residence: 1973

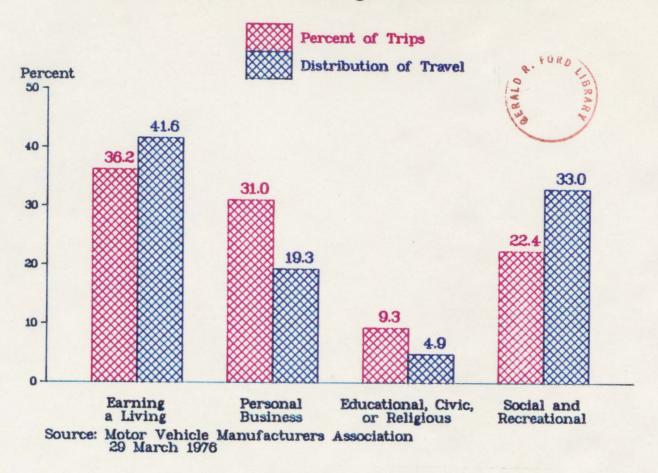


E.6 - Average Annual Miles Per Automobile By Annual Household Income



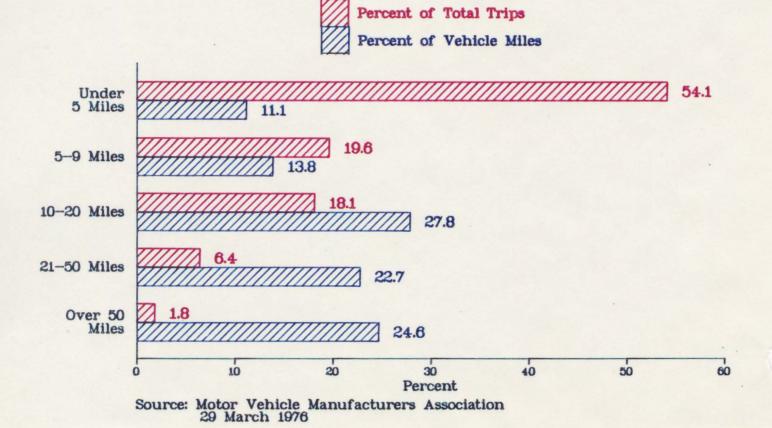
- Four out of five households, 81.3 percent, owned at least one passenger automobile in 1973 compared to 76.8 percent in 1963.
 - The proportion of households owning two or more cars has increased 65.7 percent from 20.4 percent in 1963 to 33.8 percent in 1973.
- In 1973, households owning no automobile were most likely to be located in central cities. The suburbs claimed the highest percentage of automobile ownership--89.0 percent.
- Family income is a contributing factor in determining the number of miles traveled annually per automobile.
 - Families earning \$15,000 or more averaged about twice as many miles per vehicle as families earning less than \$5,000.

E.6 - Purpose of Passenger Car Travel



Length of Passenger Car Trips

One-Way Miles

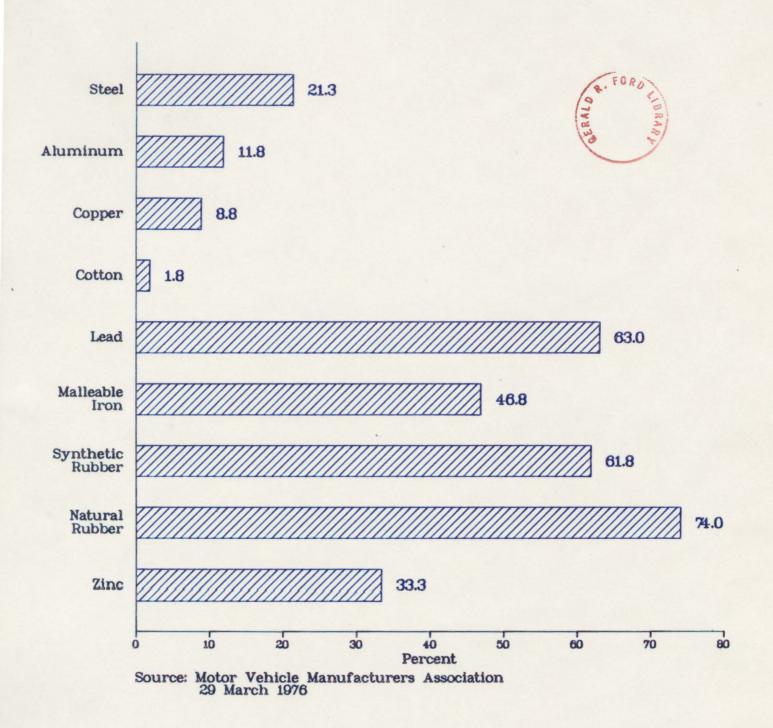




- In 1969, the latest year for which this information is available, approximately 36.2 percent of all passenger car trips and 41.6 percent of miles traveled were made to earn a living.
 - Nearly nine of ten such trips were to and from work.
- Personal and family business trips (shopping, medical, and dental treatment, etc.) accounted for 31.0 percent of total trips but only 19.3 percent of miles traveled.
- More than half of all car trips involve distances of less than 5 miles and 91.8 percent of all trips are for distances of less than 20 miles. Only about 1 percent cover distances of 100 miles or more.

E.6 - Automotive Consumption of Materials: 1973

Percent of Total U.S. Consumption



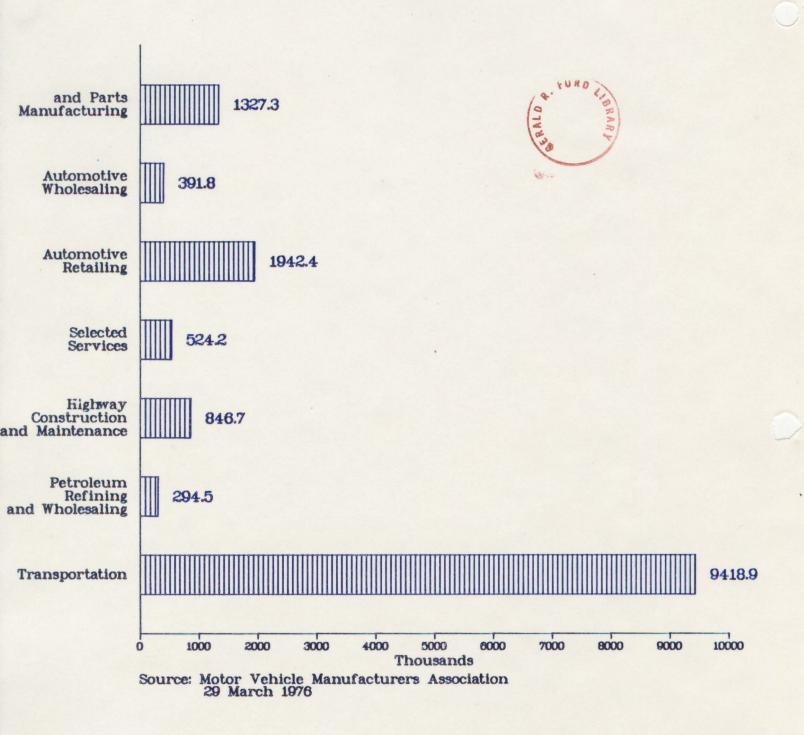


• During 1973, consumption of raw materials by U.S. motor vehicle manufacturers and their primary suppliers ranged from 74 percent of all natural rubber consumed to 1.8 percent of cotton.

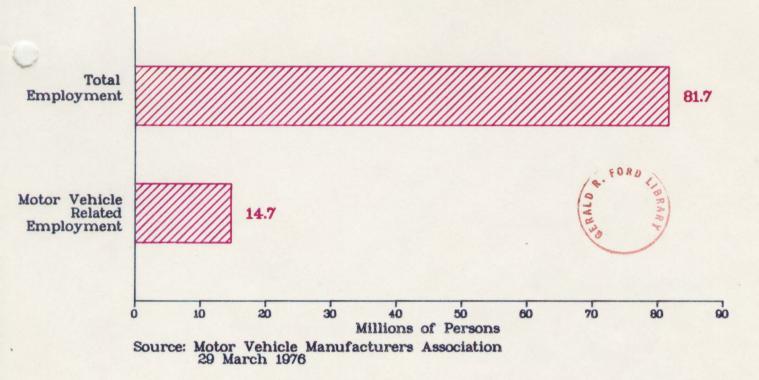
NOTE: Includes materials used for trucks, buses, and replacement parts.

Data reported for lead includes amounts used in anti-knock compounds.

E.6 - Motor Vehicle Industry Employment by Industry Group: 1972

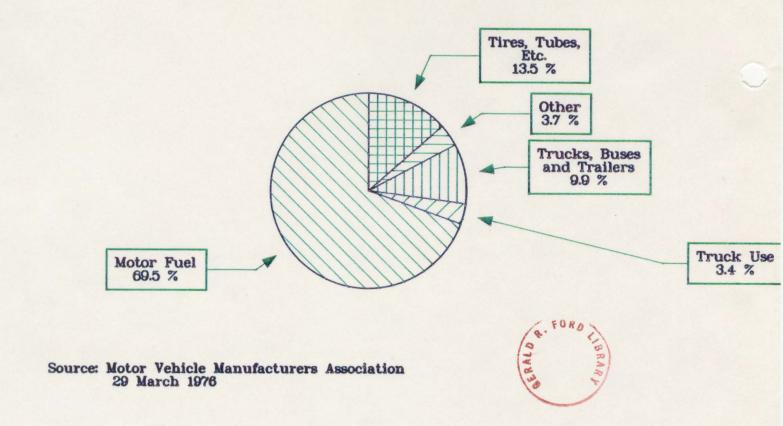


E.6 - Number of Persons Employed: 1972



- In 1972, approximately 1.3 million persons were employed directly in the manufacture of motor vehicles, parts, and equipment. Another 13 million were employed in motor vehicle-related jobs. The combined total of 14.7 million accounted for approximately 18 percent of the total number of persons employed in 1972.
 - Passenger and freight transportation, which supports 9.4 million employees, accounts for nearly two-thirds of all motor vehicle-related employment.
 - Retailing, which includes new and used motor vehicle dealers, auto and home supply stores, and gasoline dealers, employed
 1.9 million.
 - Selected Services, which includes vehicle leasing, parking, repair, and service, reported 524,200.

E.6 - Federal Automotive Excise Taxes: 1974



- Motor-Use Taxes accounted for 16 cents of every tax dollar collected by the States in Fiscal Year 1974.
 - State Motor Vehicle Fuel Taxes accounted for the largest portion of Motor-Use Tax Receipts--68.6 percent.
- During 1974, the Federal Government collected \$6.1 billion in Automotive Excise Taxes.
 - Receipts from motor fuel levies totaled \$4.3 billion, or 69.5 percent.

E.6 - State Tax Receipts: 1972 to 1974

