

Industry

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Industry

- Industrial sector turnover increased by 89% between 1997 and 2003.
- Gross output for industrial local units increased by 78% between 1997 and 2003.
- In 1997 16% of manufacturing local units were foreign owned whereas the figure was 13% in 2003. However, the proportion of Gross Output accounted for by foreign owned local units increased from 69% to 80%.
- In 2003 there were almost 5,000 industrial enterprises employing over 244,000 people, with a total turnover of €109bn.
- In 2003 56% of the total turnover of industrial enterprises was accounted for by those employing over 500 people, up from 33% in 1997.
- The greatest increase in the volume of industrial production (with price changes eliminated) between 2000 and 2005 occurred in the Medical, precision and optical instruments, watches and clocks sector (91%).

Introduction

This chapter contains information on the industrial sector. The information is drawn from the annual Census of Industrial Production (CIP) and the various short-term industrial releases of the CSO.

Industrial statistics are compiled by the CSO using inquiries to industrial firms. The most detailed inquiry is the CIP which is an annual census of such firms designed to provide information on the structure of industry. To allow for short-term analysis of industry between censuses there are a number of less detailed monthly or quarterly inquiries which track the intra-year trend in some of the major CIP aggregates such as turnover, stock changes and capital acquisitions. In addition a short-term inquiry measures the change in volume terms (ie eliminating price changes) of industrial output. The data on wages and salaries and on employment in industry are tracked on a short-term basis by a CSO inquiry – see Chapter 16.

The information is broken down by sector using the standard EU-wide NACE Rev.1.1 classification for 2003 CIP data and NACE Rev.1 classification for preceding years.

Tables 10.1 to 10.4 show aggregates from the CIP over the most recent years. The CIP covers firms with 3 or more persons engaged and consists of two separate but closely related inquiries, one covering enterprises and the other covering local units. The former relates to the trading dimension of firms and Table 10.1 shows the main trading aggregates for industrial enterprises over the most recent seven years. The latter focuses on the industrial process and Table 10.2 shows the main aggregates relating to the industrial process for industrial local units.

Tables 10.3 and 10.4 provide a sectoral breakdown of some of those aggregates for the most recent year.

Table 10.5 shows information by sector on the trend in the volume of production in industry over the most recent full six years. This is based on a monthly inquiry to firms covered in the CIP. It is confined to firms with 20 or more persons engaged but reflects very closely production trends in the entire sector. The effect of price changes is eliminated from the data to reflect the underlying volume changes.

Table 10.6 shows annual volume indices of production divided between the 'Modern' and 'All Other' sectors over the most recent full six years.

Tables 10.7 and 10.8 show the changes in stocks and capital acquisitions in recent years, again by sector. This information comes from a quarterly inquiry to industrial firms with 20 or more persons engaged.

The results

From table 10.1 for the 7 year period 1997 to 2003 there has been a marked increase in turnover of 89%. This increase is reflected in increased exports. Table 10.3 shows that, in terms of turnover value, the chemicals, electrical

(including computers) and optical equipment, and food products, beverages and tobacco sectors predominate. In 2003 they accounted for approximately 27%, 25% and 22% of total turnover respectively. These sectors between them accounted for 52% of total industrial employment.

Table 10.5 shows that in volume terms (ie eliminating price changes) the volume of industrial production increased by 25 % between 2000 and 2005. For particular sectors the volume increase was much greater, volume increased by 91% in the Medical, precision optical instruments, watches and clocks sector and volume in the Publishing, printing and reproduction of recorded media increased by 67%. There was a fall of about 81% in the leather industry.

Looking at the categorisation of production by main use, the production of intermediate products showed an 19% increase and capital goods was up by 35%. The increase in the volume of consumer goods was 37%. Table 10.6 compares the situation in 'Modern' and 'Traditional' sectors. The 'Modern' sector comprises a number of high-technology and chemical sectors. There has been a 42% increase in production in the 'Modern' sector between 2000 and 2005. This contrasts with growth of about 5% in all other sectors.

Enterprise

An enterprise is the smallest combination of legal units that is an organisational unit producing goods and services, which benefits from a certain degree of autonomy in decision-making, especially for the allocation of its current resources. In practice it is equivalent to a company or firm.

Local unit

A local unit is defined as an enterprise or part thereof situated in a geographically identified place. The different geographical locations in which an enterprise conducts industrial activities are treated as separate local units.

Turnover

Turnover comprises the net selling value of goods manufactured by an enterprise, of industrial services provided for others, of goods resold without further processing and other minor miscellaneous items.

Gross value added

This is defined as production value less intermediate consumption.

Gross output

Gross output represents the net selling value of all goods manufactured in the year, whether sold or not, including work done and capital assets manufactured for own use.

Table 10.1 Main aggregates for enterprises in all industries

	Unit	1997	1998	1999	2000	2001	2002	2003
Number of enterprises	No.	4,516	4,491	4,599	4,873	4,870	4,996	4,994
Persons engaged	No.	255,034	257,729	263,056	268,634	264,198	253,842	244,399
Males	No.	170,254	172,787	177,548	181,815	179,527	174,170	168,921
Females	No.	84,780	84,942	85,508	86,819	84,671	79,672	75,478
Turnover	€m	57,829	68,144	82,864	100,296	105,720	107,683	109,385
<i>of which exports</i>		<i>36,845</i>	<i>47,808</i>	<i>60,257</i>	<i>74,165</i>	<i>79,317</i>	<i>81,530</i>	<i>83,160</i>
Purchases	€m	37,368	45,605	54,153	66,451	70,759	68,558	67,788
Material and fuels	€m	23,889	26,678	30,559	37,355	38,579	36,141	34,920
Services and goods for factoring	€m	13,480	18,927	23,594	29,097	31,681	32,417	32,868
Gross value added	€m	21,311	23,517	30,060	33,883	35,713	39,526	42,092
Labour costs	€m	6,507	7,061	7,599	8,282	8,929	9,157	9,463
Wages and salaries	€m	5,460	5,908	6,356	6,935	7,367	7,567	7,728
Other labour costs	€m	1,046	1,152	1,244	1,362	1,562	1,590	1,735
Stocks at end of year	€m	5,304	5,840	6,843	8,328	8,510	7,821	7,973
Increase during year	€m	541	637	992	1,229	66	12	383
Additions to capital assets during year	€m	2,909	4,054	4,614	4,184	4,691	5,143	3,678

Source: CSO

Persons engaged in all industries

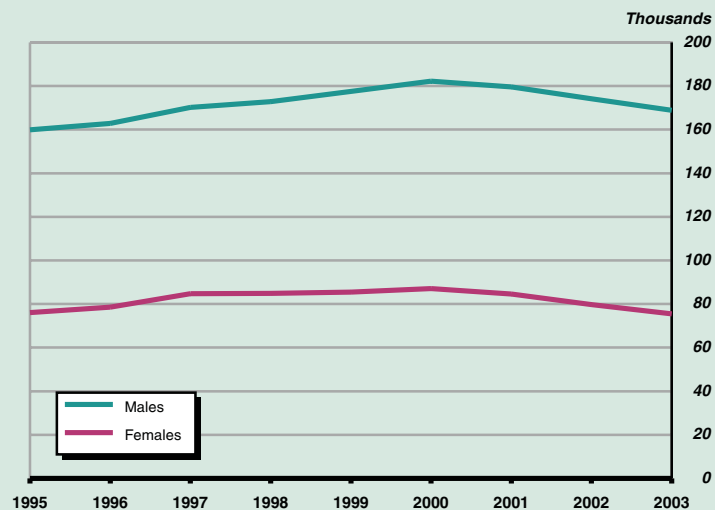


Table 10.2 Main aggregates for industrial local units in all industries

	Unit	1997	1998	1999	2000	2001	2002	2003
Number of local units	No.	4,956	4,932	5,025	5,296	5,321	5,535	5,471
Persons engaged	No.	257,933	260,357	266,123	272,590	268,240	258,435	244,890
Males	No.	173,217	175,530	180,844	185,614	183,367	178,321	170,181
Females	No.	84,716	84,827	85,279	86,976	84,873	80,114	74,709
Gross output	€m	55,537	64,628	77,803	94,472	98,374	99,966	98,747
Industrial inputs	€m	26,795	28,964	33,386	39,791	42,234	39,594	38,383
Industrial materials	€m	24,842	26,836	31,002	36,818	38,368	35,583	34,253
Fuel and power	€m	1,036	1,065	1,112	1,332	1,592	1,609	1,734
Industrial services	€m	918	1,063	1,272	1,640	2,274	2,402	2,396
Net output	€m	28,743	35,664	44,417	54,681	56,140	60,373	60,364
Wages and salaries	€m	5,514	5,955	6,431	7,029	7,489	7,692	7,701
Remainder of net output	€m	23,229	29,709	37,986	47,652	48,651	52,681	52,662
Stocks at end of year	€m	5,337	5,850	6,845	8,318	8,201	7,918	7,961
Increase during year	€m	541	642	1,013	1,256	-2	13	395
Additions to capital assets during year	€m	2,924	4,127	4,763	4,487	5,224	5,408	4,075

Source: CSO

Gross output and net output

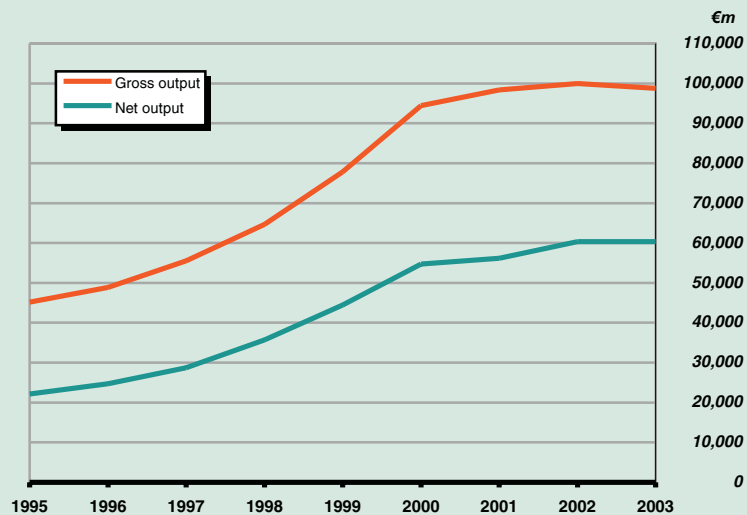


Table 10.3 Main aggregates for enterprises in each industrial sector, 2003

Industrial sector	NACE code	Enterprises	Turnover	Gross value added	Labour costs	Persons engaged
		No.	€m	€m	€m	No.
Mining and quarrying	10-14	91	1,264	463	272	5,578
Manufacture of food products, beverages and tobacco	15-16	677	23,632	9,111	1,900	50,176
Food products and beverages	15	671	21,884	7,604	1,842	49,382
Tobacco products	16	6	1,748	1,507	59	794
Textiles and textile products	17-18	273	721	230	184	6,737
Textiles	17	173	416	129	121	4,093
Wearing apparel; dressing and dyeing of fur	18	100	305	101	63	2,644
Leather and leather products	19	24	63	17	12	522
Wood and wood products	20	307	1,069	334	190	6,738
Pulp, paper and paper products; publishing and printing	21-22	669	12,464	4,227	914	22,298
Manufacture of pulp, paper and paper products	21	113	845	348	187	4,817
Publishing, printing and reproduction of recorded media	22	556	11,620	3,879	727	17,481
Chemicals, chemical products and man-made fibres	24	205	29,435	15,988	1,163	23,641
Rubber and plastic products	25	275	1,292	461	307	9,723
Other non-metallic mineral products	26	307	1,939	794	387	10,631
Basic metals and fabricated metal products	27-28	689	1,898	663	485	14,930
Basic metals	27	93	385	113	78	2,128
Fabricated metal products, except machinery and equipment	28	596	1,513	551	407	12,802
Machinery and equipment, not elsewhere classified	29	317	1,909	713	416	12,100
Electrical and optical equipment	30-33	419	27,425	6,677	1,977	53,132
Manufacture of office machinery and computers	30	62	15,187	1,182	510	13,103
Manufacture of electrical machinery and apparatus not elsewhere classified	31	177	3,101	1,495	359	10,708
Manufacture of radio, television and communication equipment and apparatus	32	55	3,566	1,474	371	9,408
Medical, precision and optical instruments, watches and clocks	33	125	5,571	2,525	737	19,913
Transport equipment	34-35	120	1,046	420	296	7,927
Manufacture of motor vehicles, trailers and semi-trailers	34	72	589	197	111	3,465
Manufacture of other transport equipment	35	48	456	223	185	4,462
Manufacturing nec; recycling; manufacture of coke, refined petroleum products and nuclear fuel	36-37, 23	598	2,012	517	317	10,634
Manufacturing nec; manufacture of coke, refined petroleum products and nuclear fuel	36, 23	571	1,901	485	306	10,255
Recycling	37	27	111	32	12	379
Electricity, gas, steam and hot water supply	40	23	3,216	1,477	642	9,632
All industries	1-4	4,994	109,385	42,092	9,463	244,399
Transportable goods industries	1-3	4,971	106,169	40,615	8,821	234,767
Manufacturing industries	15-37	4,880	104,905	40,152	8,549	229,189

Source: CSO

Table 10.4 Main aggregates for local units in each industrial sector, 2003

Industrial sector	NACE code	Local units	Gross output	Industrial inputs	Net output	Wages and salaries	Persons engaged
		No.	€m	€m	€m	€m	No.
Mining and quarrying	10-14	176	1,100	502	599	239	5,926
Manufacture of food products, beverages and tobacco	15-16	781	17,803	8,409	9,394	1,467	49,030
Food products and beverages	15	775	17,574	8,334	9,240	1,439	48,342
Tobacco products	16	6	229	75	154	28	688
Textiles and textile products	17-18	288	607	311	296	159	7,092
Textiles	17	182	375	210	165	104	4,401
Wearing apparel; dressing and dyeing of fur	18	106	232	100	132	55	2,691
Leather and leather products	19	25	30	13	17	9	473
Wood and wood products	20	317	975	570	405	164	6,870
Pulp, paper and paper products; publishing and printing	21-22	697	11,156	1,852	9,305	691	21,020
Manufacture of pulp, paper and paper products	21	120	774	338	435	160	4,931
Publishing, printing and reproduction of recorded media	22	577	10,383	1,513	8,869	532	16,089
Chemicals, chemical products and man-made fibres	24	235	28,534	4,655	23,879	901	23,669
Rubber and plastic products	25	279	1,168	603	565	252	9,536
Other non-metallic mineral products	26	379	1,525	711	814	269	9,179
Basic metals and fabricated metal products	27-28	694	1,768	977	791	408	14,947
Basic metals	27	95	362	229	133	67	2,143
Fabricated metal products, except machinery and equipment	28	599	1,407	749	658	341	12,804
Machinery and equipment, not elsewhere classified	29	325	1,608	855	753	333	11,699
Electrical and optical equipment	30-33	436	26,569	15,697	10,872	1,625	53,003
Manufacture of office machinery and computers	30	68	15,397	10,750	4,647	434	13,579
Manufacture of electrical machinery and apparatus not elsewhere classified	31	181	2,848	1,280	1,567	278	10,384
Manufacture of radio, television and communication equipment and apparatus	32	56	3,210	1,401	1,809	315	9,413
Medical, precision and optical instruments, watches and clocks	33	131	5,113	2,265	2,848	597	19,627
Transport equipment	34-35	133	1,090	573	517	318	9,680
Manufacture of motor vehicles, trailers and semi-trailers	34	82	619	366	252	128	4,422
Manufacture of other transport equipment	35	51	472	207	264	190	5,258

Table 10.4 Main aggregates for local units in each industrial sector, 2003 (continued)

Industrial sector	NACE code	Local units	Gross output	Industrial inputs	Net output	Wages and salaries	Persons engaged
		No.	€m	€m	€m	€m	No.
Manufacturing nec; recycling; manufacture of coke, refined petroleum products and nuclear fuel	36-37,23	605	1,971	1,330	641	276	11,104
Manufacturing nec; manufacture of coke, refined petroleum products and nuclear fuel	36,23	575	1,870	1,269	601	266	10,709
Recycling	37	30	100	61	39	10	395
Electricity, gas and water supply	40-41	101	2,842	1,325	1,517	591	11,662
Electricity, gas, steam and hot water supply	40	51	2,708	1,277	1,431	526	9,546
Collection, purification and distribution of water	41	50	134	48	86	65	2,116
All industries	1-4	5,471	98,747	38,383	60,364	7,701	244,890
Transportable goods industries	1-3	5,370	95,905	37,058	58,847	7,111	233,228
Manufacturing industries	15-37	5,194	94,804	36,556	58,248	6,871	227,302

Source: CSO

TABLE 10.4

Table 10.5 Volume indices of production for industrial sectors
Base year 2000=100

Industrial sector	NACE code	2000	2001	2002	2003	2004	2005
Mining and quarrying	10-14	100.0	99.7	95.2	115.4	113.5	112.8
Food products, beverages and tobacco products	15-16	100.0	106.5	110.7	114.9	120.6	122.2
Food products and beverages	15	100.0	106.7	110.9	116.4	123.7	126.1
Tobacco products	16	100.0	103.2	106.6	86.4	61.4	49.1
Textiles and textile products	17-18	100.0	106.0	72.7	65.6	65.1	56.0
Textiles	17	100.0	112.3	85.3	69.6	65.1	55.1
Wearing apparel; dressing and dyeing of fur	18	100.0	97.4	55.3	60.1	65.0	57.2
Leather and leather products	19	100.0	84.5	84.3	55.5	36.4	19.4
Wood and wood products	20	100.0	92.0	103.7	107.5	124.4	134.4
Pulp, paper and paper products; publishing, printing and reproduction of recorded media	21-22	100.0	98.6	107.4	119.2	145.5	158.1
Manufacture of pulp, paper and paper products	21	100.0	100.6	96.3	89.8	94.5	85.9
Publishing, printing and reproduction of recorded media	22	100.0	98.4	108.7	122.8	151.6	166.8
Chemicals, chemical products and man-made fibres	24	100.0	122.5	152.7	159.1	144.3	145.1
Rubber and plastic products	25	100.0	99.5	90.0	95.8	94.6	89.4
Other non-metallic mineral products	26	100.0	101.7	93.8	98.7	99.1	96.1
Basic metals and fabricated metal products	27-28	100.0	91.6	90.2	90.5	95.7	94.4
Basic metals	27	100.0	89.5	88.1	84.2	79.9	91.3
Fabricated metal products, except machinery and equipment	28	100.0	92.2	90.8	92.3	100.3	95.3
Machinery and equipment, not elsewhere classified	29	100.0	94.3	94.9	97.9	87.4	82.6
Electrical and optical equipment	30-33	100.0	108.6	102.6	109.1	116.2	125.2
Office machinery and computers	30	100.0	92.1	75.6	92.7	105.9	113.5
Electrical machinery and apparatus, not elsewhere classified	31	100.0	118.5	126.5	128.7	144.3	153.6
Radio, television and communication equipment and apparatus	32	100.0	98.0	88.9	76.8	78.2	80.6
Medical, precision and optical instruments, watches and clocks	33	100.0	135.3	135.9	165.0	170.2	190.8
Transport equipment	34-35	100.0	103.9	90.8	88.6	92.5	91.8
Manufacturing not elsewhere classified; recycling; refined petroleum products	36,37,23	100.0	91.8	81.4	72.1	71.9	75.8
Manufacturing industries		100.0	110.0	118.4	123.9	124.4	128.2
Transportable goods industries		100.0	109.9	118.1	123.8	124.2	128.0
<i>of which: Industries mainly or wholly producing</i>							
Capital goods		100.0	107.3	101.0	117.8	126.4	135.1
Intermediate products		100.0	111.1	123.0	125.1	117.7	119.1
Consumer goods		100.0	108.3	122.2	122.9	132.6	136.8
Durable consumer goods		100.0	91.9	84.7	88.9	81.5	88.8
Non-durable consumer goods		100.0	110.4	126.9	127.0	138.9	142.6
Electricity, gas and water supply	40-41	100.0	106.5	110.0	113.2	117.8	119.7
All industries		100.0	109.7	117.7	123.3	123.9	127.6
<i>of which: Energy producing industries</i>	10, 11, 12, 23, 40	100.0	99.4	104.6	111.5	115.5	117.3

Source: CSO

TABLE 10.5

Table 10.6 Volume indices of production for modern, traditional and all industries

Base year 2000=100

Year	All industries		Modern sector		Traditional sector	
	Index	Annual % change	Index	Annual % change	Index	Annual % change
2000	100.0		100.0		100.0	
2001	109.7	9.7	114.7	14.7	101.8	1.8
2002	117.7	7.3	128.6	12.1	100.3	-1.5
2003	123.3	4.8	136.3	6.0	102.3	2.0
2004	123.9	0.5	135.7	-0.4	105.0	2.6
2005	127.6	3.0	141.5	4.3	105.4	0.4

Source: CSO

TABLE 10.6

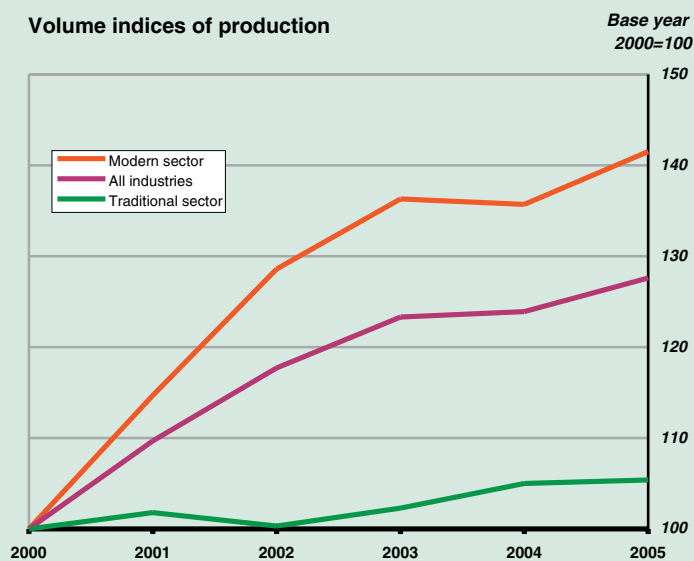


Table 10.7 Total stock changes in industry

€m

Industrial sector	NACE code	Change in 1998	Change in 1999	Change in 2000	Change in 2001	Change in 2002	Change in 2003	Change in 2004	Change in 2005
Mining and Quarrying	10-14	4.4	22.1	19.8	3.3	-9.4	9.4	15.1	24.7
Food products, beverages and tobacco	15-16	50.7	89.9	121.0	63.9	33.6	54.4	-22.1	79.0
Textiles	17	1.8	-0.3	3.8	6.0	-2.7	-10.9	-2.3	1.2
Wearing apparel	18	13.2	-5.7	0.6	10.2	-5.5	-5.2	0.5	0.8
Leather products	19	1.8	-0.5	0.8	2.6	-2.5	0.5	1.1	0.9
Wood and wood products	20	7.4	-0.8	19.3	-8.3	-1.4	15.2	31.0	21.4
Paper and paper products	21	2.5	3.2	5.5	1.9	0.6	3.8	-2.8	-0.3
Publishing and printing	22	11.8	8.9	-11.7	-20.6	87.4	-44.2	-49.0	94.5
Chemical products	24	218.1	451.6	365.1	250.8	115.8	296.0	2.1	-224.0
Rubber and plastic products	25	4.7	12.7	23.6	-2.4	0.9	-1.7	5.9	12.5
Other non-metallic mineral products	26	3.6	8.0	29.7	5.5	-7.7	4.6	10.1	12.7
Basic metals	27	-2.4	5.3	7.0	17.0	-4.9	1.9	3.5	32.3
Fabricated metals (excl machinery)	28	6.5	-5.3	12.7	1.4	0.5	4.1	40.5	7.5
Machinery not elsewhere classified	29	14.0	0.3	17.0	-0.2	-4.5	-11.0	27.9	19.0
Office machinery and computers	30	26.4	218.0	217.1	-195.2	4.2	-57.7	-35.0	138.2
Other electrical equipment	31	20.3	33.4	81.8	-30.9	20.1	-16.8	59.6	3.3
Communication equipment	32	41.7	33.9	220.7	-45.2	-154.2	-74.8	124.5	-2.4
Medical and optical instruments	33	65.7	7.4	40.0	-14.6	4.2	235.5	-77.0	4.5
Motor vehicles	34	2.2	4.1	23.0	-2.4	-7.8	12.3	21.2	2.7
Other transport equipment	35	10.2	14.1	14.9	-16.3	-23.7	-11.7	-3.1	9.5
Other manufacturing	36-37,23	38.4	-15.5	120.0	-93.0	-46.5	-24.5	5.8	5.0
Electricity and gas supply	40	81.8	79.6	-103.7	93.2	-2.8	3.6	0.4	20.4
All industries	10-40	624.3	964.6	1,227.5	26.8	-6.3	382.8	157.9	263.3
Transportable goods industries	10-37	542.7	884.9	1,331.2	-66.4	-3.5	379.2	157.5	242.9
Manufacturing industries	15-37	538.1	862.9	1,311.4	-69.7	5.9	369.8	142.4	218.2

Source: CSO

Total stock changes in all industries

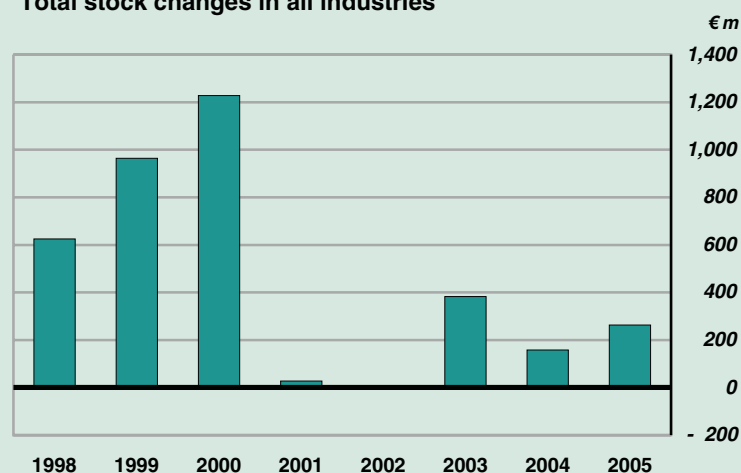


Table 10.8 Total capital acquisitions in industry

€m

Industrial sector	NACE code	Change in 1998	Change in 1999	Change in 2000	Change in 2001	Change in 2002	Change in 2003	Change in 2004	Change in 2005
Mining and Quarrying	10-14	144.2	233.8	165.8	187.7	185.7	149.8	120.3	156.6
Food products, beverages and tobacco	15-16	420.5	803.2	564.1	492.8	489.1	488.9	501.9	471.9
Textiles	17	24.3	22.3	45.4	33.1	12.0	10.7	5.2	22.6
Wearing apparel	18	10.0	12.8	10.0	5.3	3.1	4.9	6.0	4.6
Leather products	19	1.5	1.3	3.4	9.1	2.8	1.7	0.6	0.3
Wood and wood products	20	40.5	36.4	45.9	58.5	58.9	37.0	22.5	23.4
Paper and paper products	21	30.7	38.1	51.3	48.2	36.4	25.0	24.5	24.9
Publishing and printing	22	113.6	136.4	200.8	233.0	158.0	105.9	71.9	85.3
Chemical products	24	843.5	1,017.1	913.4	868.2	1,456.4	856.5	763.9	764.9
Rubber and plastic products	25	69.3	71.9	88.9	85.5	52.2	49.0	50.2	64.8
Other non-metallic mineral products	26	85.1	99.9	171.1	171.0	98.4	112.5	127.6	137.8
Basic metals	27	27.8	23.2	26.9	19.9	20.4	20.9	12.4	63.1
Fabricated metals (excl machinery)	28	46.2	40.8	64.1	100.5	56.1	48.9	33.5	41.7
Machinery not elsewhere classified	29	66.0	85.1	97.9	79.1	45.3	50.7	58.9	56.5
Office machinery and computers	30	348.7	409.2	355.5	151.1	193.1	148.9	123.8	121.4
Other electrical equipment	31	104.0	113.4	173.8	234.7	99.1	83.2	72.8	63.2
Communication equipment	32	682.1	561.5	382.7	1,161.4	726.7	146.9	905.1	1,349.1
Medical and optical instruments	33	155.3	107.3	150.5	252.5	259.0	185.4	235.2	297.0
Motor vehicles	34	49.3	18.4	33.5	29.5	30.4	29.0	31.7	23.2
Other transport equipment	35	22.0	33.9	17.3	50.8	34.5	18.0	41.3	57.0
Other manufacturing	36-37, 23	60.2	57.1	92.8	66.5	71.3	75.6	126.8	59.7
Electricity and gas supply	40	413.0	520.6	522.9	451.2	1,045.7	1,017.3	1,183.9	988.1
All industries	10-40	3,758.2	4,443.6	4,178.2	4,789.2	5,134.6	3,666.7	4,520.0	4,877.1
Transportable goods industries	10-37	3,345.1	3,923.0	3,655.1	4,338.1	4,088.9	2,649.4	3,336.1	3,889.0
Manufacturing industries	15-37	3,200.9	3,689.4	3,489.3	4,150.4	3,903.2	2,499.6	3,215.8	3,732.4

TABLE 10.8

Source: CSO

Total capital acquisitions in all industries

