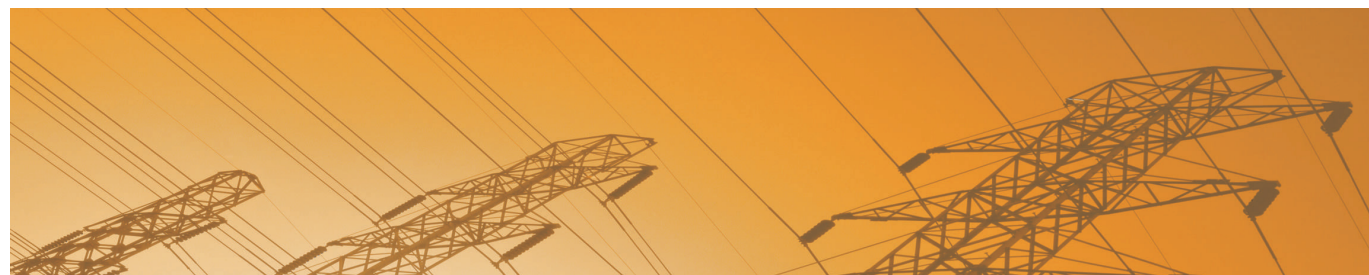


12

Industry

- Industrial sector turnover increased by 44% between 1999 and 2005.
- Gross value added for industrial enterprises increased by 29% between 1999 and 2005.
- In 2005 there were just over 4,400 industrial enterprises employing 231,000 people, with a total turnover of nearly €120bn.
- In 2005 56% of the total turnover of industrial enterprises was accounted for by those employing over 500 people, an increase of 1% on 2004.
- The greatest increase in the volume of industrial production (with price changes eliminated) between 2002 and 2007 occurred in the publishing, printing and reproduction of recorded media sector (113%).



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Introduction

This chapter contains information on the industrial sector. The data is drawn from the annual Census of Industrial Production (CIP) and the various short-term industrial releases of the CSO. The information is broken down by sector using the standard EU-wide NACE Rev.1.1 classification.

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. 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.

Table 12.1 shows the main trading aggregates for industrial enterprises over the period 1999-2005.

Table 12.2 provides the main aggregates for enterprises in each industrial sector for 2005 while table 12.3 provides main aggregates for local units by county.

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, salaries and on employment in industry are tracked on a short-term basis by a CSO inquiry – see Chapter 18.

Table 12.4 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 12.5 shows annual volume indices of production divided between the 'Modern' and 'Traditional' (All Other) sectors over the most recent full seven years since 2000.

Tables 12.6 and 12.7 show the changes in stocks and capital acquisitions in the industrial sector from the Quarterly Accounts Inquiry to Industry survey. This survey covers industrial firms with 20 or more persons engaged.

The results

From table 12.1 for the 7 year period 1999 to 2005 there has been an increase in turnover of 44%. This increase is reflected in increased exports. Table 12.2 shows that, in terms of turnover value, the chemicals, electrical (including computers), optical equipment and food products and beverages sectors predominate. In 2005 they accounted for approximately 26%, 25% and 19% of total turnover respectively. These sectors between them accounted for 53% of total industrial employment.

Table 12.4 shows that in volume terms (ie eliminating price changes) the volume of industrial production increased by 22% between 2002 and 2007. For particular sectors

the volume increase was much greater, volume increased by 113% in the Publishing, printing and reproduction of recorded media and volume in the Office machinery and computers sector increased by 70%. There was a fall of about 66% in the Leather and leather products sector.

Looking at the categorisation of production by main use, the production of durable consumer goods showed a 61% increase and capital goods was up by 45%. The increase in the volume of consumer goods was 45%. Table 12.5 compares the situation in 'Modern' and 'Traditional' (All Other) sectors. The 'Modern' sector comprises a number of high-technology and chemical sectors. There has been a 64% increase in production in the 'Modern' sector between 2000 and 2007. This contrasts with growth of about 11% in the 'Traditional' (All Other) sectors.

Table 12.6 shows that the value of stocks held in all industries increased by €353.6m in the year 2007. The highest increase of almost €492m was recorded in NACE 24 (chemical products) compared to 2006. Another sector that showed an increase in stock was NACE 15 (food products and beverages). There were decreases in stock levels in NACE 22 (publishing and printing) and NACE 30 (office machinery and computers).

From table 12.7 the total capital acquisition figures show expenditure of €4,410.6m in the year 2007. The acquisitions are widely spread across the industrial sectors with the highest capital acquisition of €1,172.3m occurring in NACE 24 (chemical products). Other sectors to show significant capital acquisitions include NACE 40 (electricity and gas supply) with €1,112m and NACE 15-16 (food products, beverages and tobacco products) with €458m.

Technical Notes

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.

Tables 12.2, 12.4, 12.6 and 12.7

NACE 16 which was grouped with NACE 15 in previous years is now grouped with NACE 36, 37 and 23 to protect confidentiality.

Table 12.5

The 'Modern' sector includes the following industrial sectors:

NACE 223 Reproduction of recorded media
NACE 24 Chemicals (incl man-made fibres)
NACE 30,33 Computers and instrument engineering
NACE 31,32 Electrical machinery and equipment.

Table 12.1 Main aggregates for enterprises in all industries

	Unit	1999	2000	2001	2002	2003	2004	2005
Number of enterprises	No.	4,599	4,873	4,870	4,996	4,995	4,684	4,418
Persons engaged	No.	263,056	268,634	264,198	253,842	244,237	235,489	231,002
Males	No.	177,548	181,815	179,527	174,170	168,662	162,406	160,473
Females	No.	85,508	86,819	84,671	79,672	75,523	73,083	70,529
Turnover	€m	82,864	100,296	105,720	107,766	109,308	112,373	119,365
<i>of which exports</i>		60,257	74,200	79,317	81,530	83,306	86,552	91,565
Purchases	€m	54,153	67,985	70,259	68,372	67,827	70,545	81,774
Material and fuels	€m	30,559	37,162	38,579	36,462	34,786	35,460	38,854
Services and goods for factoring	€m	23,594	30,823	31,681	31,910	33,041	35,085	42,920
Gross value added	€m	30,060	33,883	35,713	39,841	38,518	39,062	38,758
Labour costs	€m	7,599	8,282	8,929	9,185	9,501	9,607	9,954
Wages and salaries	€m	6,356	6,921	7,367	7,595	7,760	7,848	8,143
Other labour costs	€m	1,244	1,362	1,562	1,590	1,741	1,759	1,811
Stocks at end of year	€m	6,843	8,339	7,891	7,821	7,966	7,823	8,133
Increase during year	€m	992	1,229	-35	12	391	344	320
Additions to capital assets during year	€m	4,614	4,184	4,691	5,143	3,675	4,877	5,489

Source: CSO

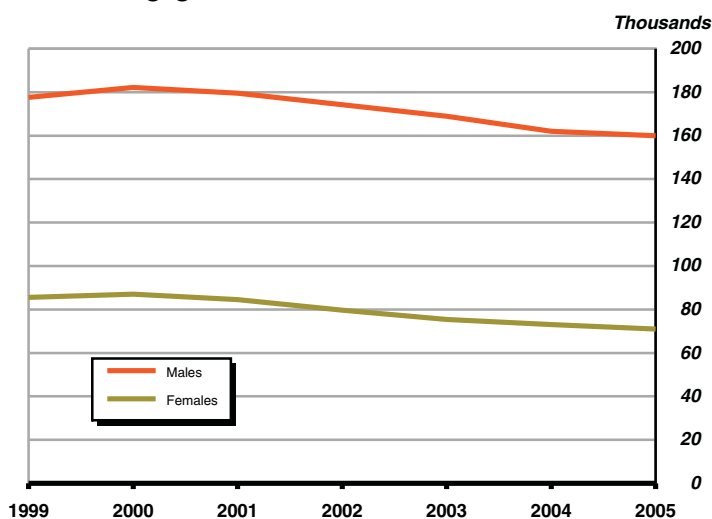
Persons engaged in all industries

Table 12.2 Main aggregates for enterprises in each industrial sector, 2005

Industrial sector	NACE code	Number of Enterprises	Turnover	Gross value added	Labour costs	Number of Persons engaged
			€m	€m	€m	
Mining and quarrying	10-14	101	1,652	664	284	5,875
Manufacture of food products, beverages	15	568	22,584	6,391	1,788	43,489
Textiles and textile products	17-18	210	626	248	139	4,893
Textiles	17	138	324	135	80	2,785
Wearing apparel; dressing and dyeing of fur	18	72	302	113	59	2,108
Leather and leather products	19	16	41	14	8	283
Wood and wood products	20	277	1,165	387	210	6,657
Pulp, paper and paper products; publishing and printing	21-22	582	14,738	4,440	894	18,764
Manufacture of pulp, paper and paper products	21	96	580	219	151	3,427
Publishing, printing and reproduction of recorded media	22	486	14,159	4,221	743	15,337
Chemicals, chemical products and man-made fibres	24	181	30,593	12,000	1,437	24,566
Rubber and plastic products	25	264	1,479	542	335	9,779
Other non-metallic mineral products	26	292	2,377	935	468	10,849
Basic metals and fabricated metal products	27-28	647	2,236	770	540	15,276
Basic metals	27	86	538	161	95	2,386
Fabricated metal products, except machinery and equipment	28	561	1,698	609	444	12,890
Machinery and equipment, not elsewhere classified	29	273	2,034	775	428	11,345
Electrical and optical equipment	30-33	342	30,339	7,097	2,119	53,452
Manufacture of office machinery and computers	30	45	17,639	1,990	549	12,733
Manufacture of electrical machinery and apparatus not elsewhere classified	31	138	3,078	781	314	8,560
Manufacture of radio, television and communication equipment and apparatus	32	34	3,267	1,585	349	7,868
Medical, precision and optical instruments, watches and clocks	33	125	6,356	2,742	907	24,291
Transport equipment	34-35	98	1,102	476	304	7,218
Manufacture of motor vehicles, trailers and semi-trailers	34	56	660	223	110	3,354
Manufacture of other transport equipment	35	42	442	253	194	3,864
Manufacturing nec; recycling; manufacture of coke, refined petroleum products and nuclear fuel; manufacture of tobacco products	36-37, 23, 16	506	3,686	1,418	343	9,516
Manufacturing nec; petroleum products and nuclear fuel; and tobacco products	36,16 & 23	472	3,581	1,386	331	9,056
Recycling	37	34	105	32	12	460
Electricity, gas, steam and hot water supply	40	61	4,713	2,600	658	9,040
All industries	1-4	4,418	119,365	38,758	9,954	231,002
Transportable goods industries	1-3	4,357	114,653	36,157	9,296	221,962
Manufacturing industries	15-37	4,256	113,000	35,494	9,011	216,087

Source: CSO

Table 12.3 Main aggregates for industrial local units by county, 2005

Region, county	No. of units	Total engaged	Wages and Salaries	Gross output	Industrial inputs
		No.	€m	€m	€m
Border					
Cavan	85	4,321	124,179	1,389,132	1,060,073
Donegal	173	5,286	120,332	662,356	371,164
Leitrim	34	932	25,627	159,732	81,524
Louth	167	7,082	229,206	3,825,497	883,697
Monaghan	116	4,739	130,524	941,392	655,452
Sligo	71	3,864	102,273	623,150	334,634
Midland					
Laois	73	1,573	43,801	355,951	216,155
Longford	53	2,587	75,575	474,033	308,564
Offaly	86	4,664	150,931	673,017	362,107
Westmeath	102	3,645	104,353	610,657	317,933
West					
Galway	254	14,479	432,755	2,646,719	1,245,573
Mayo	143	5,766	185,264	2,564,600	500,942
Roscommon	61	2,752	81,914	544,930	392,587
Dublin					
Dublin	639	23,170	873,262	5,753,006	2,329,053
Dun Laoghaire-Rathdown	98	3,767	168,712	9,773,637	630,852
Fingal	171	11,187	450,414	8,685,114	3,328,433
South Dublin	227	9,550	381,223	2,331,891	1,062,857
Mid-East					
Kildare	187	14,985	550,715	5,610,915	2,029,485
Meath	174	5,670	183,191	1,088,475	648,871
Wicklow	157	6,269	202,520	1,342,854	583,088
Mid-West					
Clare	161	7,527	265,730	2,024,942	707,082
Limerick	205	15,424	552,263	13,679,952	9,212,692
Tipperary North Riding	83	4,419	140,853	859,810	560,848
South-East					
Carlow	70	2,719	86,064	380,353	197,037
Kilkenny	108	2,623	86,821	762,170	538,838
Tipperary South Riding	89	5,332	192,462	4,184,639	1,570,423
Waterford	147	10,738	349,318	1,762,564	820,525
Wexford	178	5,507	145,023	1,183,167	618,539
South-West					
Cork	579	32,099	1,236,952	29,951,816	8,059,604
Kerry	138	4,785	146,988	1,228,578	512,591
Non-Attributable	24	7,844	482,191	3,501,780	1,274,856
All industries	4,853	235,306	8,301,134	109,576,468	41,416,081

Source: CSO

Table 12.4 Volume indices of production for industrial sectors

Base year 2000=100

Industrial sector	NACE code	2002	2003	2004	2005	2006	2007
Mining and quarrying	10-14	95.2	115.4	113.5	112.8	123.3	128.2
Food products and beverages and Tobacco	15 - 16	110.7	114.9	120.6	122.2	#	#
Food products and beverages	15	110.9	116.4	123.7	126.1	127.7	129.8
Tobacco products	16	106.6	86.4	61.4	49.1	#	#
Textiles and textile products	17-18	72.7	65.6	65.1	56.0	46.0	39.9
Textiles	17	85.3	69.6	65.1	55.1	53.1	51.6
Wearing apparel; dressing and dyeing of fur	18	55.3	60.1	65.0	57.2	36.4	23.9
Leather and leather products	19	84.3	55.5	36.4	19.4	16.8	28.8
Wood and wood products	20	103.7	107.5	124.4	134.4	149.5	138.3
Pulp, paper and paper products; publishing, printing and reproduction of recorded media	21-22	107.4	119.2	145.5	158.1	178.2	217.0
Manufacture of pulp, paper and paper products	21	96.3	89.8	94.5	85.9	87.3	93.0
Publishing, printing and reproduction of recorded media	22	108.7	122.8	151.6	166.8	189.1	231.9
Chemicals, chemical products and man-made fibres	24	152.7	159.1	144.3	145.1	150.5	162.1
Rubber and plastic products	25	90.0	95.8	94.6	89.4	91.2	94.2
Other non-metallic mineral products	26	99.4	105.6	108.0	115.4	117.5	115.0
Basic metals and fabricated metal products	27-28	90.2	90.5	95.7	94.4	95.2	102.1
Basic metals	27	88.1	84.2	79.9	91.3	95.3	106.1
Fabricated metal products, except machinery and equipment	28	90.8	92.3	100.3	95.3	95.2	100.9
Machinery and equipment, not elsewhere classified	29	94.9	97.9	87.4	82.6	91.4	99.1
Electrical and optical equipment	30-33	102.6	109.1	116.2	125.1	134.8	140.3
Office machinery and computers	30	75.6	92.7	105.9	113.5	121.6	128.2
Electrical machinery and apparatus, not elsewhere classified	31	126.5	128.7	144.3	153.8	175.8	171.5
Radio, television and communication equipment and apparatus	32	88.9	76.8	78.2	80.6	92.8	96.6
Medical, precision and optical instruments, watches and clocks	33	135.9	165.0	170.2	190.8	189.9	203.1
Transport equipment	34-35	90.8	88.6	92.5	91.8	92.0	102.5
Manufacturing not elsewhere classified; recycling; refined petroleum products	36,37, & 23	81.4	72.1	71.9	75.8	#	#
Manufacturing not elsewhere classified; recycling; refined petroleum products and Tobacco products	36,37, 23&16	#	#	#	#	66.9	70.7
Manufacturing industries		118.4	123.9	124.4	128.2	134.9	145.0
Transportable goods industries		118.1	123.8	124.2	128.0	134.8	144.8
of which Industries mainly or wholly producing							
Capital goods		101.0	117.8	126.4	135.1	138.1	145.9
Intermediate products		123.0	125.1	117.7	119.1	120.1	122.0
Consumer goods		122.2	122.9	132.6	136.8	153.7	176.7
Durable consumer goods		84.7	88.9	81.5	88.8	122.0	136.1
Non-durable consumer goods		126.9	127.0	138.9	142.6	157.5	181.6
Electricity, gas and water supply	40-41	110.0	113.2	117.8	119.7	120.5	124.4
All industries		117.7	123.3	123.9	127.6	134.0	143.7
of which Energy producing industries	10, 11, 12, 23, 40 & 41	104.6	111.5	115.5	117.3	119.7	122.2

Source: CSO

Table 12.5 Volume indices of production for modern, traditional and all industries
Base year 2000=100

Year	Modern sector		Traditional sector (All other sectors)		All industries	
	Index	Annual % change	Index	Annual % change	Index	Annual % change
2000	100.0		100.0		100.0	
2001	114.7	14.7%	101.8	1.8%	109.7	9.7%
2002	128.6	12.1%	100.3	-1.5%	117.7	7.3%
2003	136.3	6.0%	102.3	2.0%	123.3	4.8%
2004	135.7	-0.4%	105.0	2.6%	123.9	0.5%
2005	141.5	4.3%	105.4	0.4%	127.6	3.0%
2006	151.0	6.7%	107.0	1.5%	134.0	5.0%
2007	164.1	8.7%	111.0	3.7%	143.7	7.2%

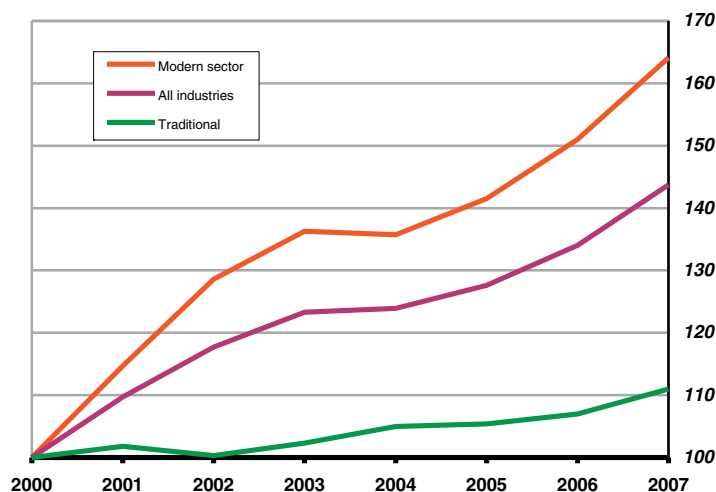
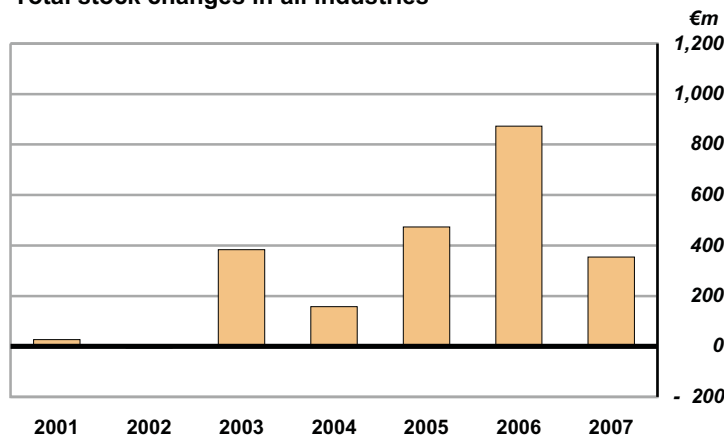
Source: CSO
Volume indices of production
*Base year
2000=100*

Total stock changes in all industries


Table 12.6 Total stock changes in industry

€m

Industrial sector	NACE code	Change in 2001	Change in 2002	Change in 2003	Change in 2004	Change in 2005	Change in 2006	Change in 2007
Mining and Quarrying	10-14	3.3	-9.4	9.4	15.1	20.6	2.0	13.5
Food products, beverages and tobacco	15-16	63.9	33.6	54.4	-22.1	#	#	#
Food products, beverages	15	67.1	5.5	#	#	40.9	-3.3	182.3
Tobacco products	16	-3.2	28.1	#	#	#	#	#
Textiles	17	6.0	-2.7	-10.9	-2.3	2.5	3.9	-8.3
Wearing apparel	18	10.2	-5.5	-5.2	0.5	-4.6	43.0	0.0
Leather products	19	2.6	-2.5	0.5	1.1	1.5	0.8	-0.1
Wood and wood products	20	-8.3	-1.4	15.2	31.0	18.9	-2.4	28.8
Paper and paper products	21	1.9	0.6	3.8	-2.8	-0.1	7.9	11.2
Publishing and printing	22	-20.6	87.4	-44.2	-49.0	92.4	120.2	-282.2
Chemical products	24	250.8	115.8	296.0	2.1	-52.6	484.9	492.3
Rubber and plastic products	25	-2.4	0.9	-1.7	5.9	11.4	12.1	17.9
Other non-metallic mineral products	26	5.5	-7.7	4.6	10.1	13.3	27.8	54.8
Basic metals	27	17.0	-4.9	1.9	3.5	33.0	30.0	21.6
Fabricated metals (excl machinery)	28	1.4	0.5	4.1	40.5	12.2	22.9	19.0
Machinery not elsewhere classified	29	-0.2	-4.5	-11.0	27.9	18.2	41.2	15.4
Office machinery and computers	30	-195.2	4.2	-57.7	-35.0	192.8	122.4	-263.7
Other electrical equipment	31	-30.9	20.1	-16.8	59.6	4.3	29.0	-17.3
Communication equipment	32	-45.2	-154.2	-74.8	124.5	-6.9	35.4	-29.0
Medical and optical instruments	33	-14.6	4.2	235.5	-77.0	21.3	48.2	53.9
Motor vehicles	34	-2.4	-7.8	12.3	21.2	5.6	-9.5	-3.5
Other transport equipment	35	-16.3	-23.7	-11.7	-3.1	9.3	24.3	-11.4
Other manufacturing	36-37, 23	-93.0	-46.5	-24.5	5.8	#	#	#
Other manufacturing	36,37, 23&16	#	#	#	#	16.4	-87.1	48.8
Electricity and gas supply	40	93.2	-2.8	3.6	0.4	22.7	-81.6	9.9
All industries	10-40	26.8	-6.3	382.8	157.9	473.1	872.2	353.6
Transportable goods industries	10-37	-66.4	-3.5	379.2	157.5	450.4	953.8	343.8
Manufacturing industries	15-37	-69.7	5.9	369.8	142.4	429.8	951.7	330.3

Source: CSO

Table 12.7 Total capital acquisitions in industry

€m

Industrial sector	NACE code	2001	2002	2003	2004	2005	2006	2007
Mining and Quarrying	10-14	187.7	185.7	149.8	120.3	143.5	193.2	189.1
Food products, beverages and tobacco products	15-16	492.8	489.1	488.9	501.9	#	#	#
Food products, beverages	15	479.9	472.5	#	#	490.9	459.8	458.0
Tobacco products	16	12.9	16.6	#	#	#	#	#
Textiles	17	33.1	12.0	10.7	5.2	24.2	6.6	9.6
Wearing apparel	18	5.3	3.1	4.9	6.0	3.0	3.8	3.0
Leather products	19	9.1	2.8	1.7	0.6	0.3	0.3	0.5
Wood and wood products	20	58.5	58.9	37.0	22.5	23.8	25.4	34.6
Paper and paper products	21	48.2	36.4	25.0	24.5	22.9	42.8	48.5
Publishing and printing	22	233.0	158.0	105.9	71.9	87.5	106.5	101.8
Chemical products	24	868.2	1,456.4	856.5	763.9	792.1	905.0	1,172.3
Rubber and plastic products	25	85.5	52.2	49.0	50.2	57.8	82.8	97.6
Other non-metallic mineral products	26	171.0	98.4	112.5	127.6	133.6	154.8	244.0
Basic metals	27	19.9	20.4	20.9	12.4	59.6	149.8	17.9
Fabricated metals (excl machinery)	28	100.5	56.1	48.9	33.5	39.9	43.3	64.1
Machinery not elsewhere classified	29	79.1	45.3	50.7	58.9	50.7	72.7	68.8
Office machinery and computers	30	151.1	193.1	148.9	123.8	123.9	70.4	55.0
Other electrical equipment	31	234.7	99.1	83.2	72.8	59.1	60.4	68.8
Communication equipment	32	1,161.4	726.7	146.9	905.1	1,347.0	628.8	49.8
Medical and optical instruments	33	252.5	259.0	185.4	235.2	290.5	243.9	386.5
Motor vehicles	34	29.5	30.4	29.0	31.7	20.3	20.6	24.7
Other transport equipment	35	50.8	34.5	18.0	41.3	55.4	33.2	134.4
Other manufacturing	36-37, 23	66.5	71.3	75.6	126.8	#	#	#
Other manufacturing	36,37, 23 & 16	#	#	#	#	56.3	61.6	69.6
Electricity and gas supply	40	451.2	1,045.7	1,017.3	1,183.9	989.0	1,090.3	1,112.0
All industries	10-40	4,789.2	5,134.6	3,666.7	4,520.0	4,871.3	4,455.9	4,410.6
Transportable goods industries	10-37	4,338.1	4,088.9	2,649.4	3,336.1	3,882.3	3,365.6	3,298.6
Manufacturing industries	15-37	4,150.4	3,903.2	2,499.6	3,215.8	3,738.8	3,172.5	3,109.5

Source: CSO

Total Capital Acquisitions in Industry