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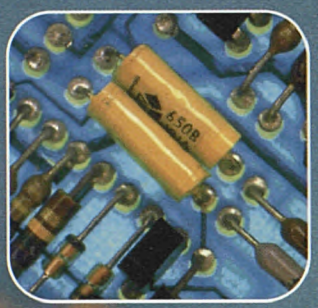
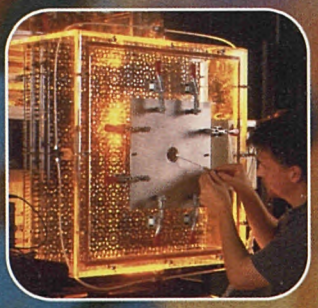
Monthly Panorama of European Industry



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ISSUE 3/97 ■ MARCH 1997

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Monthly Panorama of European Industry

ISSUE 3/97 ■ MARCH 1997

Theme 4
Energy and industry

Series B
Short-term statistics

Sent to press in March 1997

A great deal of additional information on the European Union is available on the Internet. It can be accessed through the Europa server (http://europa.eu.int)

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Editorial

Latest outlook - the most recent short-term indicators for European industry in tabular and graphic format, page 13.

As well as the standard economic data for total industry and the main industrial groupings, this month we focus on the rubber and plastics industry, as a complement to the articles on the chemicals industry published in issue 2. Together the rubber and plastics industries accounted for some 3.7% of total manufacturing production value in the EU in 1996. The plastics industry is three times the size of the rubber industry. It has shown impressive growth over the past decade: however, this trend was reversed in 1996, with the production value actually falling.

In addition this issue has one contribution from the professional trade association representing the plastics industry: namely, EuPC (European Plastics Converters). The article gives an account of recent developments in the EU from an industry persepctive.

We would also like to take this opportunity to inform readers that we are currently preparing the first of five special issues planned for this year. These publications will go into more depth on a particular topic. The first has been given over to the subject of construction statistics, and will be published during May. It will be structured as follows:

In depth - a close look into the rubber and plastics industry, page 49.

★a general overview of construction industry data within Eurostat;
★a report from FIEC (the industry representative) on recent developments in the five largest EU economies;
★a study on the role of small and medium sized enterprises in construction;
★and finally two articles on related intermediate goods' industries - iron and steel and non-metallic minerals.

The first special issue will be followed by another featuring articles on the analysis of industrial statistics, and a third describing the structure of European industry. Moving on to autumn/winter 1997, there will be an issue on the competitiveness of European industry and another on Scandinavian industrial developments.

Special focus - Analysis of the plastics industry by the european trade association EuPC, page 75.

François de Geuser,
Luxembourg

Contents

The Monthly Panorama of European Industry has the objective of furnishing readers with an instrument which will allow them to follow the evolution of industrial short-term trends and also show the structure and activity of industry at the sectorial level. The publication appears eleven times during the course of the year. When the occasion warrants topical articles may well be treated in the form of a special edition, five of which are planned for 1997.

The opinions expressed in this publication are those of the individual authors alone and do not necessarily reflect the position of the European Commission.

Next issue:
Mechanical engineering
Sub-contracting

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Data marked with this symbol is available on the diskette - for further details see page 70

Economic commentary

current economic situation in the EU, Japan and United States

Data in this section

index of production, consumer price index, trade balance

For full methodological notes and an explanation of the signs and abbreviations used in this publication, please refer to page 71

In this section:

Introduction

In 1996, manufacturing output rose by 0.2% in EUR 15, by 2.4% in Japan and by 2.7% in the United States. Of the EU Member States, Germany recorded a 0.2% increase, but the figure for Italy fell by 2.8%. In December 1996, the increase in producer prices in manufacturing industry totalled 0.4% in the EU and 2.5% in the USA, whereas they fell by 0.4% in Japan. They also dropped in Germany (by 0.3%), Finland and the United Kingdom, but rose in Italy (0.5%), France (0.6%) and Spain (1.8%).

The economy as a whole

Growth in GDP, as forecast by Commission Services (November 1996), was expected to be up in 1997 by 2.2% in Germany, 2.1% in France, 3.0% in the United Kingdom, 1.4% in Italy and 2.7% in Spain.

The Community unemployment rate, on the other hand, stood at 10.8% of the active population in November 1996.

Meanwhile, the consumer price index rose by 2.2% over the last twelve months and showed no change from October.

At the end of January 1997, the three-monthly interest rates stood at 3.1% in Germany, 3.4% in France and 6.4% in the United Kingdom. By way of comparison, the rates were 5.2% in the USA and 0.3% in Japan. These low levels could, therefore, stimulate Community investment and activity, despite the restrictions imposed on public expenditure. Likewise, the increase in the value of the dollar should mean that Community products become more competitive, thus stimulating Community exports.

Industry as a whole

The curve marking the trend in Community manufacturing output since 1994 shows that growth has slowed down since the last quarter of 1994. The growth rate in manufacturing output between the last quarter of 1995 and the last quarter of 1996 was 0.7% for the EU, with individual rates of 1.7% for France and the United Kingdom. During the final quarter of 1996, however, a certain recovery could be detected at Community level, with the three-month trend in production up 0.3% on the preceding quarter.

Further information:

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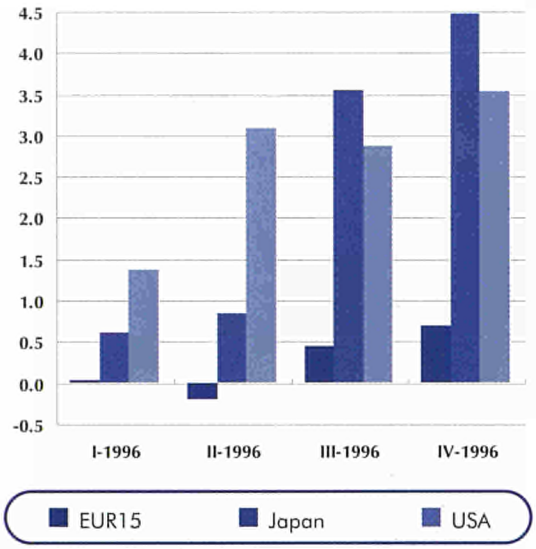
In 1996, manufacturing output was up 0.2% in EUR15

Figure 1.1



Year on year growth rates (t/t-4) for industrial production (%)

Source: eurostat

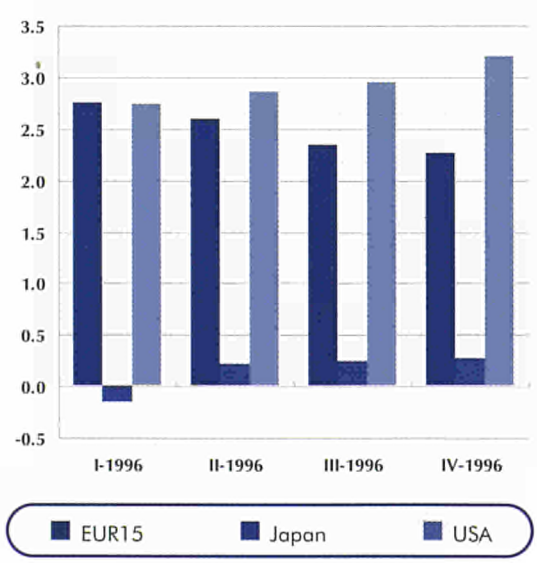
Situation in the different Member States

Germany is having to cope with rising unemployment, with the figures reaching 11.3% in January 1997 (9.8% in the west and 17.3% in the east), 1.2 points higher than in January 1996. One of the causes of this worsening situation is the drop in activity in the construction sector. In December 1996, output was up 1.4% on the previous month, making corrections for seasonal variations, whilst the capacity utilisation rate in manufacturing industry stood at 83.2%. In addition, during the first eleven months of 1996, the value of trade rose by 6.7% for exports and by almost 3.4% for imports. Finally, Germany's rate of inflation stood at 1.4% in 1996.

According to Commission's forecasts from November 1996, France's GDP will grow by almost one percentage point more in 1997 than in 1996. Manufacturers have been regaining confidence since the beginning of the year in anticipation of a growth in exports resulting from the increase in the value of the dollar. The investment ratio (ratio of GFCF to value added) stabilised in 1996 at its lowest ever level of 16.4%, thereby only just ensuring the renewal of production capacity. The automobile market fell by 33.6% in January 1997 compared to the same month the previous year, mainly because incentives were withdrawn and the figures recorded for January 1996 had been exceptional due to the backlog caused by the wave of strikes at the end of 1995. In December 1996, consumption of manufactured products fell by 0.8% in comparison to the same month of the previous year and when corrected to take account of seasonal variations. Finally, consumer prices rose by 0.2% in December 1996 and inflation was 1.7% for 1996 as a whole.

In the United Kingdom, industrial output rose by 0.6% in December 1996 over the previous month and by 1.9% for the year. Growth in GDP was 0.8% in the fourth quarter of 1996 compared to the previous quarter, while unemployment continued to fall to 6.7% of the active population in

Figure 1.2

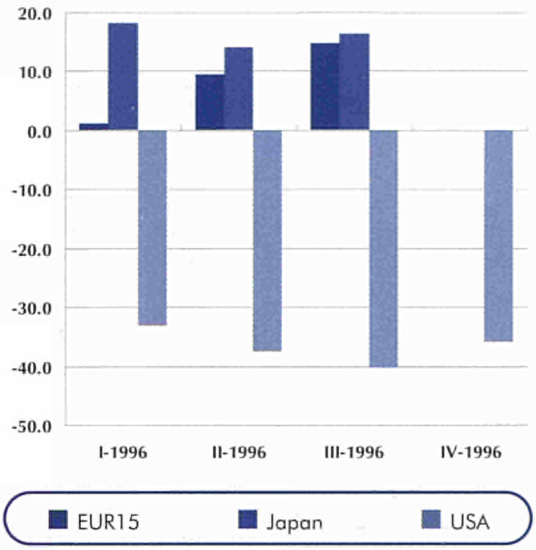


Year on year growth rates (t/t-4) for consumer prices (%)

Source: eurostat

Figure 1.3

Quarterly trade balance (billion ECU)



Source: eurostat

December 1996. Due to the strength of the pound, exports were expected to be down in 1997, the largest falls affecting the chemical, textile and metalworking industries. Prices, on the other hand, rose by 2.5% in 1996.

The growth in Italian output slowed down in 1996. Stronger growth is, however, forecast for 1997 despite flagging consumer confidence and worsening unemployment. The increase in consumer prices has slowed down a little, with the January 1997 figure being 0.2% up on the previous month and 2.6% up for the year.

In Spain, the production of capital goods, which is a good indicator of the trend in investment, was 3.0% up on the first eleven months of 1996 and interest rates were falling. In addition, the drop in the unemployment rate to 21.8% of the active population in the last quarter of 1996 as against 22.4% the previous year and the slowing down of inflation are both factors which are capable of stimulating the consumption of households. In December 1996, industrial prices were up 0.1% on the previous month and by 1.8% over the last twelve months. Finally, the budget deficit and social security deficit in 1996 amounted to 3.3% and 0.4% of GDP respectively, more or less in line with the targets set of 3.5% and 0.3%.

According to the latest provisional figures, turnover in the Netherlands rose by 3.2% in 1996, which is the highest growth rate for five years. This increase is mainly due to developments in the retail trade sector. The labour market is also dynamic with 120,000 jobs being created in 1996, and at the beginning of 1997 consumer confidence was riding high.

Finland recorded a 4.0% increase in output between November 1995 and November 1996, whilst inflation was low at 0.8% over the same period. In neighbouring Sweden, prices actually fell by 0.2% between November and December 1996 and by the same percentage for the twelve months from December 1995.

Table 1.1

Year on year growth rates (t/t-12) for industrial production (%)

	EUR15	Japan	USA
01-96	0.0	1.8	0.8
02-96	0.1	1.1	1.9
03-96	-0.1	-0.8	1.3
04-96	-0.4	-1.2	3.1
05-96	-1.0	2.6	2.9
06-96	0.8	1.3	3.3
07-96	1.2	4.3	3.2
08-96	-0.1	1.7	2.8
09-96	0.2	4.4	2.6
10-96	1.4	5.2	3.0
11-96	0.8	4.9	3.6
12-96	-0.2	3.3	4.0

Source: eurostat

The growth rate in Member States' GDP is expected to rise in 1997

Table 1.2

	EUR15	Japan	USA
02-96	2.7	-0.2	2.7
03-96	2.7	0.1	2.8
04-96	2.7	0.4	2.9
05-96	2.7	0.3	2.9
06-96	2.5	0.0	2.8
07-96	2.5	0.6	3.0
08-96	2.3	0.2	2.9
09-96	2.3	-0.1	3.0
10-96	2.4	0.1	3.0
11-96	2.2	0.5	3.3
12-96	2.2	0.2	3.3
01-97	2.2	:	:

Year on year growth rates (t/t-12) for consumer prices (%)

Source: eurostat

United States and Japan

In 1996, American GDP grew by 2.4% in volume terms and was expected to rise by much the same amount in 1997; inflation, on the other hand, stood at 2.9% last year. Industrial output in the USA rose by 2.7% in 1996. It should be noted that manufacturing output in the USA has risen steadily over the last three years. The capacity utilisation rate continued its upward trend to reach 83.8%; on this basis, the OECD forecasts that investment requirements in this sector could actually fall, even though they are expected to rise by 6.0% in 1997. The USA's economic indicators are all healthy and the unemployment rate is expected to stabilise at around 5.5% of the active population. The only factor which is likely to check consumption is the weight of household debt.

Table 1.3

	EUR15	Japan	USA
01-96	-4.0	2.0	-12.0
02-96	1.2	6.3	-9.9
03-96	4.0	9.8	-11.3
04-96	1.7	4.0	-12.3
05-96	3.4	3.2	-13.5
06-96	4.2	6.8	-11.7
07-96	8.0	5.3	-13.8
08-96	4.9	4.1	-12.8
09-96	1.6	7.0	-13.8
10-96	:	:	-11.2
11-96	:	:	-11.5
12-96	:	:	-13.3

Monthly trade balance (billion ECU)

Source: eurostat

Japan's GDP grew by 3.5% in 1996, though the trend for industry was uneven. The Japanese government has estimated that it will grow by 2.2% in 1997 and 1.8% in 1998, this marked a certain slowdown. Prices more or less stagnated in 1996 (0.3%) but inflation is forecast to rise to 1.3% in 1997. In their quest for lower production costs, Japanese enterprises are relocating production sites and dismissing staff. Forecasts show there is a risk that future growth will be hampered by the weight of the government debt - the budget deficit amounted to 7.0% of GDP in 1996. In addition, whilst the fall in the value of the yen is helping to redress the country's balance of trade figures, it will also lead to an increase in the value of imports due to the higher prices paid for imported raw materials.

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The Panorama CD-ROM Professional Version

The Panorama of EU Industry has established itself as one of the major sources of data and commentary on EU industrial activity - giving a wide cross-sectional analysis of some 200 industrial and service activities. Now Eurostat has launched a database - containing not only the text and tables from the publication, but also:

★ country breakdowns of EU totals;

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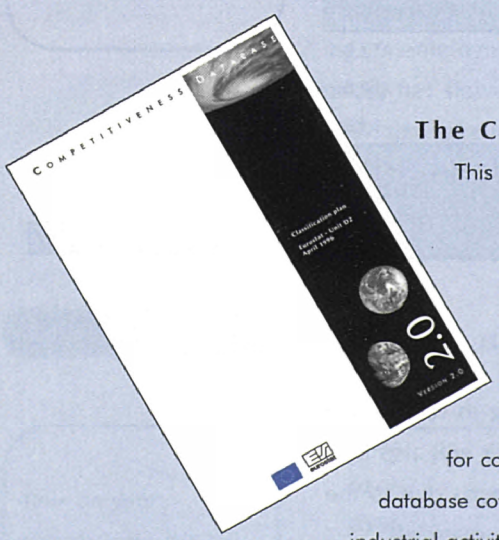
★ and data from National Accounts.

All this information is contained on one single, easy-to-use CD-Rom. As well as containing a pictorial representation of the publication, with powerful search facilities to enable the user to access related industries, the CD-Rom has the added facility of being able to link directly with spreadsheets and word processors. This CD-Rom is a useful tool for consultants, policy advisors, researchers and anyone generally interested in EU industry.



The Competitiveness Database

This is a new product, bringing together a wide range of indicators linked to industrial competitiveness for the EU Member States and OECD countries. This database will be vital for anyone interested in studying industrial competitiveness, for comparing industrial opportunities. The database covers some 30 countries in depth, 200 industrial activities and nearly 100 indicators, for the period 1980-1995. The database comes on CD-ROM and includes Eurostat standard CUB.X software for viewing and extracting the data.

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Business cycle at a glance

Short-term indicators

production index, producer price index, employment index, capacity utilisation, the construction sector, foreign trade indices

data extracted on: 10/3/97

For full methodological notes and an explanation of the signs and abbreviations used in this publication, please refer to page 71

Table 2.1

Business cycle at a glance - situation for the production index of the main industrial groupings, trend cycle

	Latest 3 months available	Total industry	Intermediate goods	Capital goods	Consumer durables	Consumer non-durables
EUR15	10-96 ⇨ 12-96	→	↗	→	↘	→
B	10-96 ⇨ 12-96	↗	↗↗	→	↘	→
DK	10-96 ⇨ 12-96	→	→	↘	↘	→
D	10-96 ⇨ 12-96	↗	↗	→	↘	→
EL	09-96 ⇨ 11-96	→	→	↗↗	↗	→
E	10-96 ⇨ 12-96	→	↗	↗	↗	→
F	10-96 ⇨ 12-96	→	→	→	↘	→
IRL	07-96 ⇨ 09-96	↗	↗↗	↘	:	↗
I	10-96 ⇨ 12-96	↘	↘	↘	↘↘	→
L	09-96 ⇨ 11-96	↗	↗	↗	↗	↗
NL	10-96 ⇨ 12-96	→	→	→	→	→
A	⇨	:	:	:	:	:
P	⇨	:	:	:	:	:
FIN	10-96 ⇨ 12-96	↗	↗	↗↗	:	→
S	10-96 ⇨ 12-96	↗	↗	↗↗	↗	↗
UK	10-96 ⇨ 12-96	↗	↗	↗	↗	→
Japan	10-96 ⇨ 12-96	↗	↗	↗	↗	→
USA	10-96 ⇨ 12-96	↗	↗	↗	↗	↗

Growth rates:

↗↗			>2.5%
↗	0.5%	→	2.5%
→	-0.5%	→	0.5%
↘	-2.5%	→	-0.5%
↘↘			<-2.5%

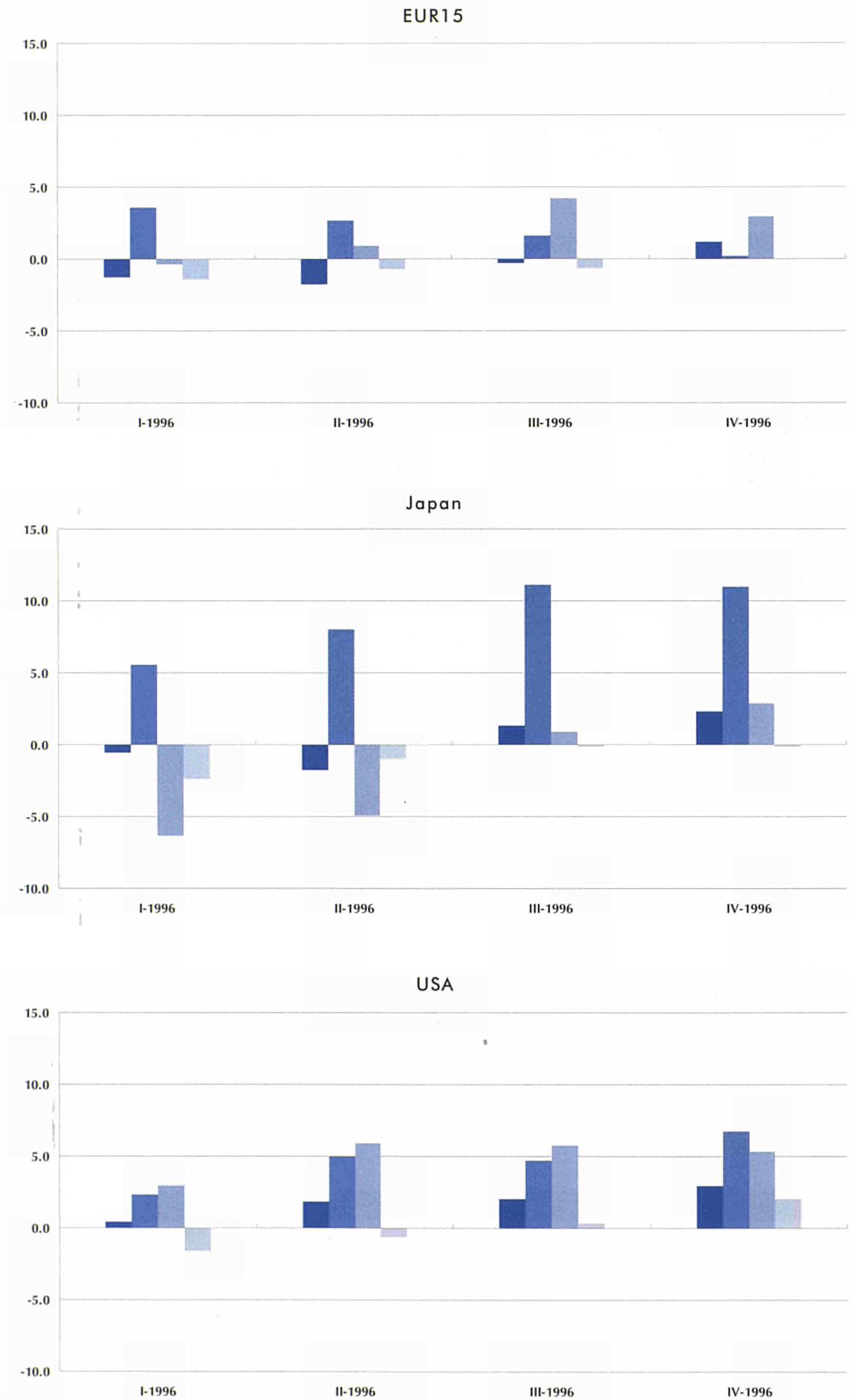
Source: eurostat

eurostat

PRODUCTION INDEX - W.D.ADJ.

Figure 2.1

TRIAD comparison of production growth for the main industrial groupings, based on changes from the corresponding quarter of the previous year, w.d.adj. (%)



Source: eurostat

Table 2.2

Indices of production for total industry, w.d.adj. (1990 = 100)

	1994	1995	1996	07-96	08-96	09-96	10-96	11-96	12-96
EUR15	99.4	103.2	103.5	99.2	81.2	107.2	109.2	111.1	103.5
B	94.7	98.7	99.3	83.2	81.1	110.8	100.7	109.6	96.5
DK	111.2	115.8	117.1	95.0	120.3	126.7	125.2	125.3	110.6
D	93.9	95.9	96.1	93.5	87.0	101.2	103.6	102.7	98.0
EL	:	:	:	104.8	91.2	110.0	105.1	101.7	:
E	98.7	103.3	102.2	107.7	65.0	106.9	110.3	110.7	95.9
F	97.6	99.3	99.4	95.1	75.2	100.5	104.9	105.3	98.7
IRL	:	:	:	161.8	146.4	165.9	179.7	:	:
I	101.7	107.9	104.9	109.4	51.9	111.3	109.6	113.2	97.3
L	:	:	:	98.3	75.9	102.1	102.8	105.9	:
NL	103.2	106.7	110.2	91.8	92.2	106.1	112.2	117.9	121.1
A	:	:	:	:	:	:	:	:	:
P	94.9	99.4	100.1	105.5	73.8	105.4	103.5	103.5	97.8
FIN	107.3	115.3	118.0	86.1	111.5	126.0	126.7	129.1	122.8
S	103.8	114.1	117.5	80.5	105.7	122.8	122.3	127.9	138.2
UK	103.5	106.0	107.3	99.6	94.6	107.4	111.5	116.0	108.7
Japan	93.1	96.3	98.6	101.9	90.2	104.0	100.8	103.7	102.0
USA	109.8	113.4	116.5	114.9	120.3	120.5	118.6	117.1	116.5

Source: eurostat

Table 2.3

TRIAD comparison of indices of production for the main industrial groupings, w.d.adj. (1990 = 100)

	1994	1995	1996	07-96	08-96	09-96	10-96	11-96	12-96
Total industry									
EUR15	99.4	103.2	103.5	99.2	81.2	107.2	109.2	111.1	103.5
Japan	93.1	96.3	98.6	101.9	90.2	104.0	100.8	103.7	102.0
USA	109.8	113.4	116.5	114.9	120.3	120.5	118.6	117.1	116.5
Intermediate goods									
EUR15	101.9	105.0	104.4	99.9	82.7	107.2	110.0	111.1	101.2
Japan	95.5	99.3	99.7	102.2	92.1	102.6	103.4	104.6	101.8
USA	104.1	105.4	107.3	110.2	113.4	113.6	110.8	107.8	106.6
Capital goods									
EUR15	91.9	98.9	100.9	95.4	77.4	106.3	104.9	109.2	111.5
Japan	85.6	89.5	97.5	98.5	88.0	111.2	99.6	103.1	102.3
USA	103.7	108.6	113.7	111.6	116.8	118.8	117.6	115.6	114.4
Consumer durables									
EUR15	96.1	98.0	99.8	93.8	65.6	110.1	110.6	110.4	94.1
Japan	82.3	81.3	79.7	84.8	61.7	84.2	85.3	87.2	78.8
USA	114.5	120.9	126.9	122.2	130.5	132.0	130.7	128.3	126.7
Consumer non-durables									
EUR15	102.1	104.2	103.5	102.4	87.6	107.7	111.1	112.5	101.2
Japan	98.8	98.7	97.8	102.0	90.1	98.0	98.1	104.2	105.3
USA	107.2	108.5	108.5	110.1	113.7	114.4	112.1	109.0	106.8

Source: eurostat

PRODUCTION INDEX - SEASONALLY ADJUSTED

Table 2.4

	1994	1995	1996	07-96	08-96	09-96	10-96	11-96	12-96
EUR15	99.4	103.2	103.5	104.0	103.3	103.6	104.0	104.1	103.9
B	94.7	98.7	99.3	113.2	90.3	104.8	100.2	101.3	104.4
DK	111.2	115.8	117.1	121.4	118.2	116.6	118.1	118.3	117.8
D	93.9	95.9	96.1	97.5	96.8	96.1	96.9	96.7	97.7
EL	:	:	:	99.8	99.1	97.8	98.5	100.1	:
E	98.7	103.3	102.2	103.2	103.6	102.5	104.4	103.3	102.6
F	97.6	99.3	99.4	101.1	101.1	99.7	99.6	99.6	100.2
IRL	:	:	:	174.2	170.1	166.5	173.7	:	:
I	101.7	107.9	104.9	105.1	108.3	105.4	104.8	103.2	102.1
L	:	:	:	101.0	96.4	101.2	100.8	102.3	:
NL	103.2	106.7	110.2	108.6	110.0	109.8	109.2	110.1	111.1
A	:	:	:	:	:	:	:	:	:
P	94.9	99.4	100.1	100.8	103.9	102.5	100.1	100.7	99.3
FIN	107.3	115.3	118.0	118.9	117.7	120.0	120.3	121.2	121.8
S	103.8	114.1	117.5	117.8	116.3	118.2	117.4	122.0	126.8
UK	103.5	106.0	107.3	107.3	106.7	107.4	107.5	108.1	108.8
Japan	93.1	96.3	98.6	99.6	97.4	98.7	102.5	101.2	101.5
USA	109.8	113.4	116.5	116.8	117.2	117.3	117.3	118.3	119.0

Indices of production for total industry, seasonally adjusted (1990 = 100)

Source: eurostat

Table 2.5

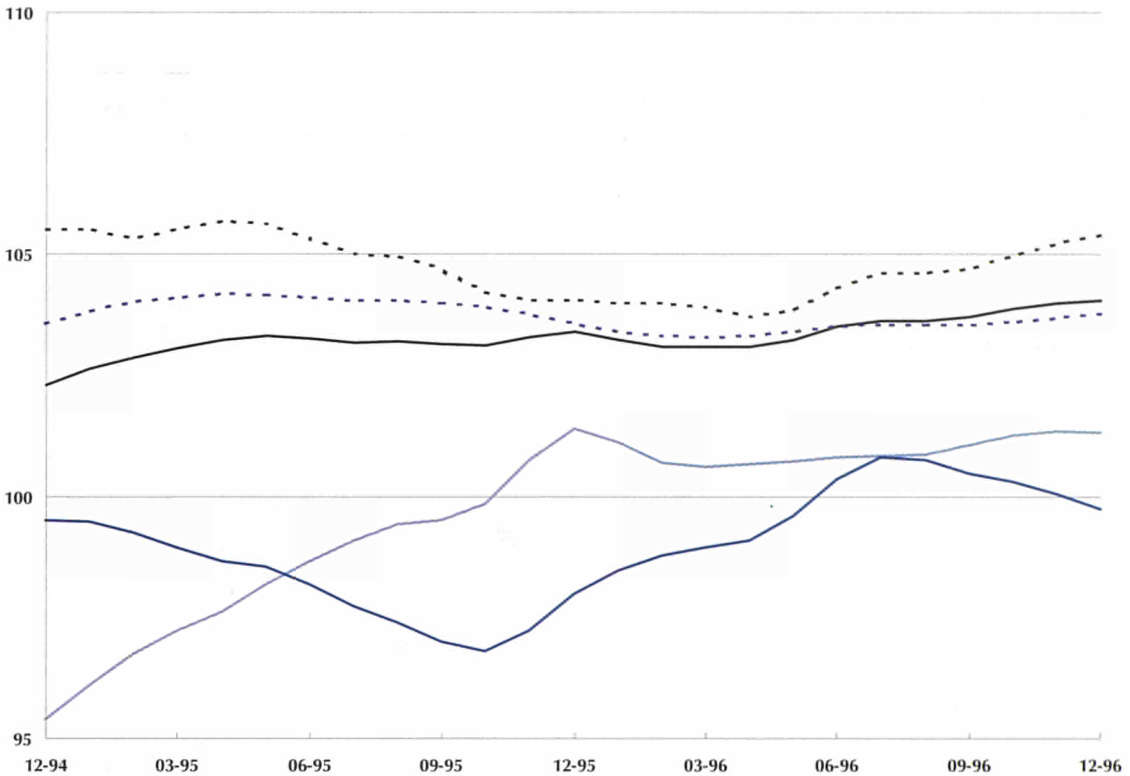
	1994	1995	1996	07-96	08-96	09-96	10-96	11-96	12-96
Total industry									
EUR15	99.4	103.2	103.5	104.0	103.3	103.6	104.0	104.1	103.9
Japan	93.1	96.3	98.6	99.6	97.4	98.7	102.5	101.2	101.5
USA	109.8	113.4	116.5	116.8	117.2	117.3	117.3	118.3	119.0
Intermediate goods									
EUR15	101.9	105.0	104.4	105.1	104.4	104.6	105.0	105.3	105.4
Japan	95.5	99.3	99.7	100.1	98.5	99.6	102.5	101.4	102.1
USA	104.1	105.4	107.3	106.9	107.9	108.5	108.4	109.3	109.6
Capital goods									
EUR15	91.9	98.9	100.9	101.2	100.1	101.5	101.1	101.8	101.0
Japan	85.6	89.5	97.5	100.4	97.1	99.1	102.8	102.4	101.9
USA	103.7	108.6	113.7	115.0	114.8	115.0	115.6	115.8	116.8
Consumer durables									
EUR15	96.1	98.0	99.8	102.1	100.7	100.2	100.3	100.5	99.2
Japan	82.3	81.3	79.7	82.1	75.9	79.5	86.7	81.6	80.5
USA	114.5	120.9	126.9	128.2	128.7	128.5	128.1	128.9	130.5
Consumer non-durables									
EUR15	102.1	104.2	103.5	103.6	103.5	103.4	103.5	103.7	103.9
Japan	98.8	98.7	97.8	98.0	97.8	96.2	99.3	99.3	99.3
USA	107.2	108.5	108.5	108.6	108.5	109.2	109.4	110.2	111.0

TRIAD comparison of indices of production for the main industrial groupings, seasonally adjusted (1990 = 100)

Source: eurostat

Figure 2.2

EUR15 production index by main industrial grouping, trend cycle (1990 = 100)



Source: eurostat

Table 2.6

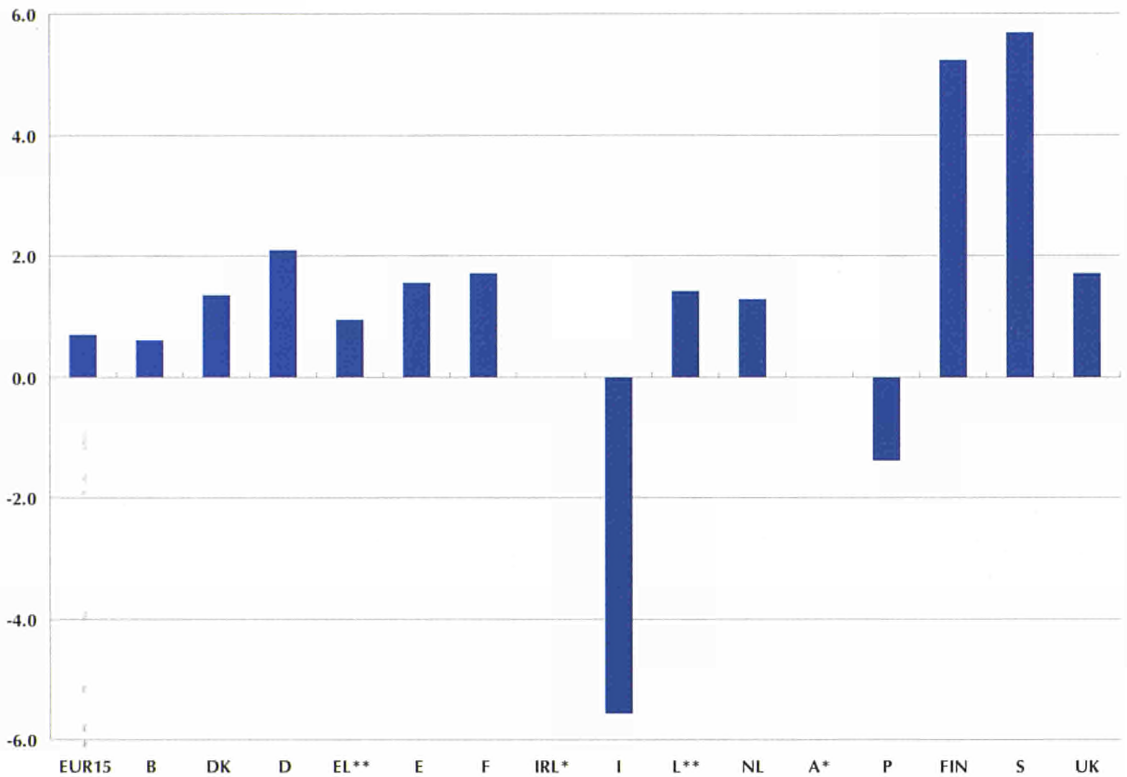
Three month on three month growth rates for the production index of the main industrial groupings, trend cycle (%)

	Latest 3 months available			Total industry	Intermediate goods	Capital goods	Consumer durables	Consumer non-durables
EUR15	10-96	⇨	12-96	0.3	0.5	0.4	-0.6	0.1
B	10-96	⇨	12-96	0.6	4.0	-0.3	-1.0	-0.5
DK	10-96	⇨	12-96	0.0	0.0	-1.2	-1.4	0.0
D	10-96	⇨	12-96	0.5	1.7	0.3	-0.5	0.4
EL	09-96	⇨	11-96	0.3	0.3	3.8	2.4	0.0
E	10-96	⇨	12-96	0.3	0.6	1.0	0.9	-0.4
F	10-96	⇨	12-96	0.1	0.2	0.0	-0.5	0.0
IRL	07-96	⇨	09-96	1.2	2.8	-0.8	:	0.5
I	10-96	⇨	12-96	-1.4	-2.0	-0.9	-3.0	-0.4
L	09-96	⇨	11-96	1.1	1.6	0.7	1.8	0.5
NL	10-96	⇨	12-96	0.4	0.4	0.5	0.5	0.3
A	10-95	⇨	12-95	0.8	-2.1	-2.1	0.5	-0.4
P	09-96	⇨	11-96	0.0	-0.7	0.7	3.1	2.5
FIN	10-96	⇨	12-96	1.7	1.9	4.0	:	-0.1
S	10-96	⇨	12-96	1.7	0.7	3.5	1.1	1.8
UK	10-96	⇨	12-96	0.9	1.0	1.8	0.9	0.1
Japan	10-96	⇨	12-96	1.5	1.4	2.3	1.3	0.3
USA	10-96	⇨	12-96	0.7	0.8	1.1	0.6	1.1

Source: eurostat

PRODUCTION INDEX - W.D.ADJ.

Figure 2.3



Annual growth rates for the production index of total industry, based on changes from the corresponding three months of the previous year, w.d.adj., Oct-96 to Dec-96 (%)

Source: eurostat

Table 2.7

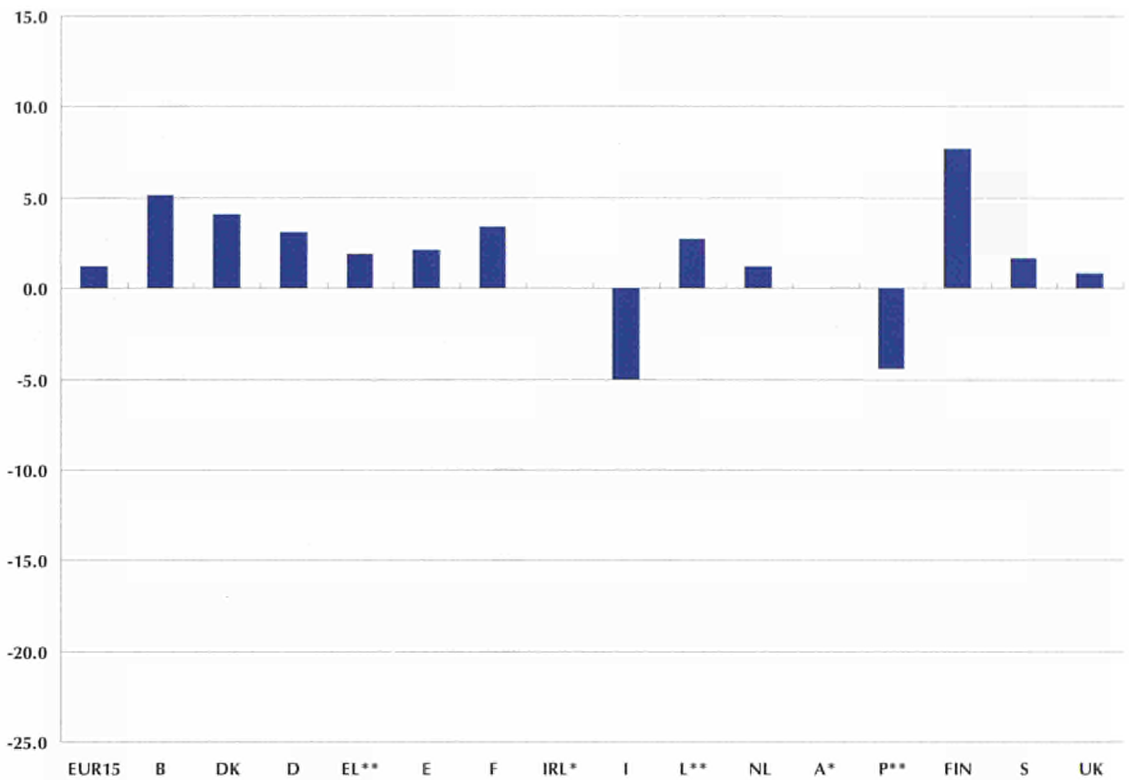
	Latest 3 months available			Total industry	Intermediate goods	Capital goods	Consumer durables	Consumer non-durables
EUR15	10-96	⇨	12-96	0.7	1.2	0.2	3.0	0.0
B	10-96	⇨	12-96	0.6	5.1	-4.2	10.1	-6.0
DK	10-96	⇨	12-96	1.3	4.1	-0.8	1.5	0.0
D	10-96	⇨	12-96	2.1	3.1	1.4	2.7	0.8
EL	09-96	⇨	11-96	1.1	1.8	4.6	8.8	-1.3
E	10-96	⇨	12-96	1.5	2.1	3.9	10.2	-2.5
F	10-96	⇨	12-96	1.7	3.4	0.8	0.6	-0.4
IRL	07-96	⇨	09-96	3.4	13.3	-3.4	:	1.0
I	10-96	⇨	12-96	-5.6	-5.1	-11.4	-5.6	-1.3
L	09-96	⇨	11-96	0.2	1.0	5.5	-24.1	-4.1
NL	10-96	⇨	12-96	1.3	1.2	-0.3	5.0	1.9
A	10-95	⇨	12-95	6.1	0.0	1.8	2.0	-1.4
P	09-96	⇨	11-96	2.0	-0.7	9.5	1.9	9.4
FIN	10-96	⇨	12-96	5.2	7.7	14.4	:	1.1
S	10-96	⇨	12-96	5.7	1.6	7.8	6.6	11.1
UK	10-96	⇨	12-96	1.7	0.8	4.1	5.5	0.7
Japan	10-96	⇨	12-96	4.5	2.4	11.0	2.9	-0.1
USA	10-96	⇨	12-96	3.5	2.9	6.8	5.4	2.1

Annual growth rates for the production index of the main industrial groupings, based on changes from the corresponding three months of the previous year, w.d.adj. (%)

Source: eurostat

Figure 2.4

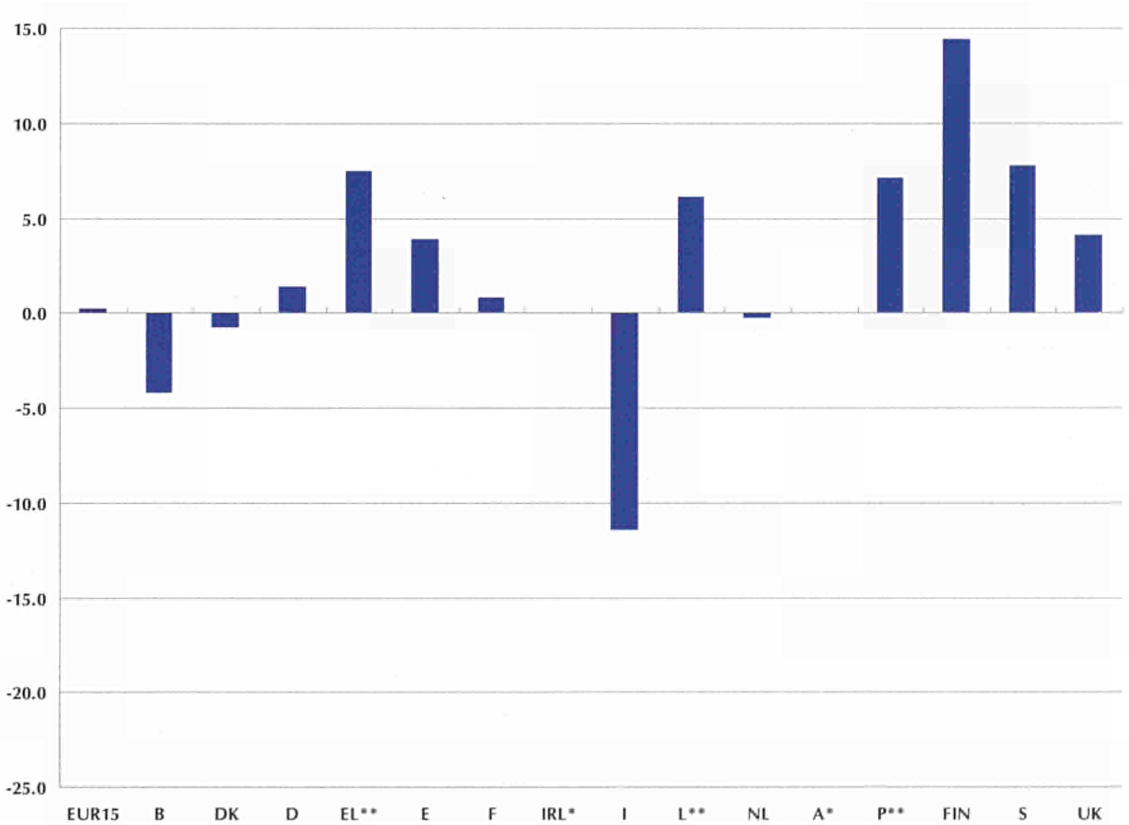
Annual growth rates for the production index of intermediate goods, based on changes from the corresponding three months of the previous year, w.d.adj., Oct-96 to Dec-96 (%)



Source: eurostat

Figure 2.5

Annual growth rates for the production index of capital goods, based on changes from the corresponding three months of the previous year, w.d.adj., Oct-96 to Dec-96 (%)



Source: eurostat

PRODUCTION INDEX - W.D.ADJ.

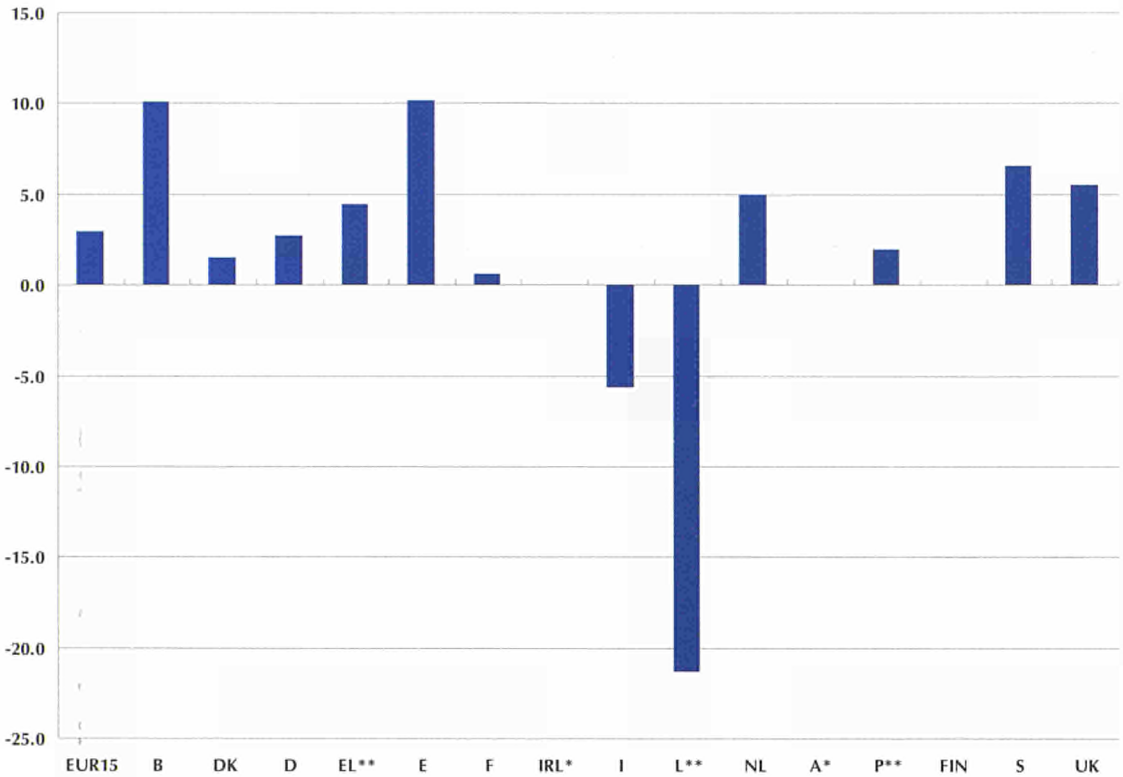


Figure 2.6

Annual growth rates for the production index of consumer durables, based on changes from the corresponding three months of the previous year, w.d.adj., Oct-96 to Dec-96 (%)

Source: eurostat

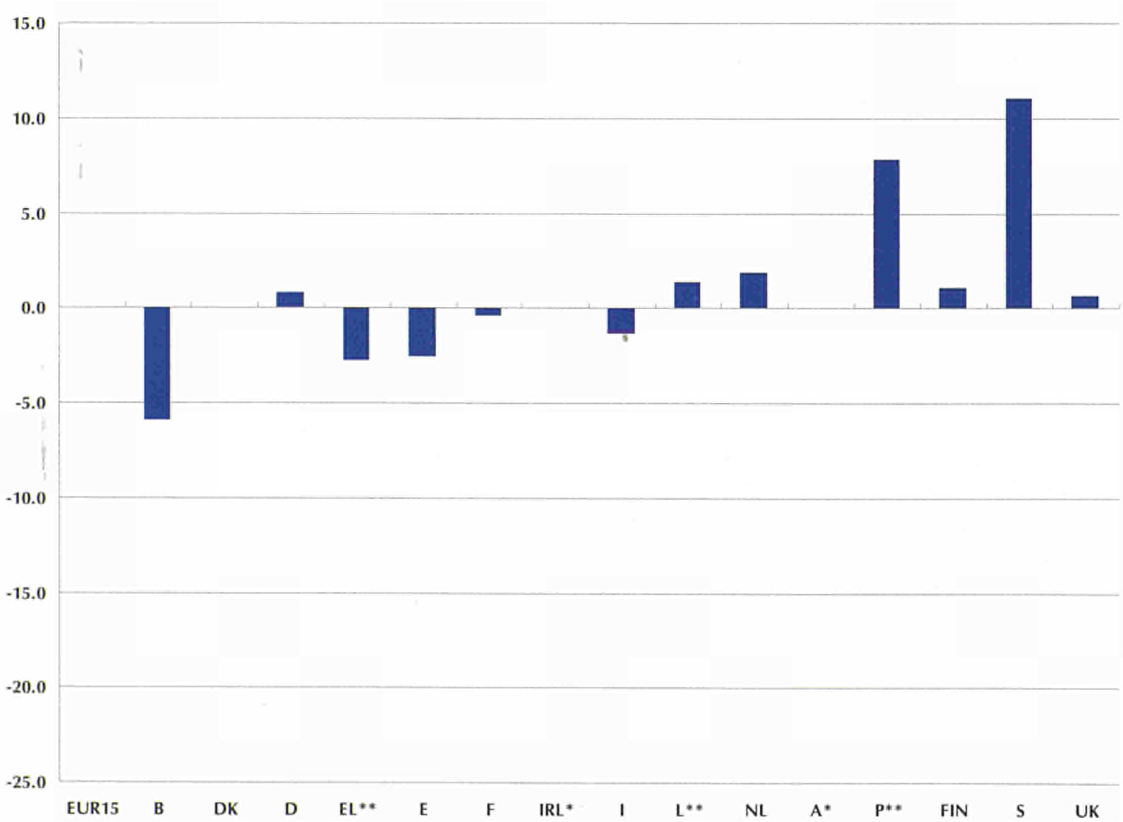


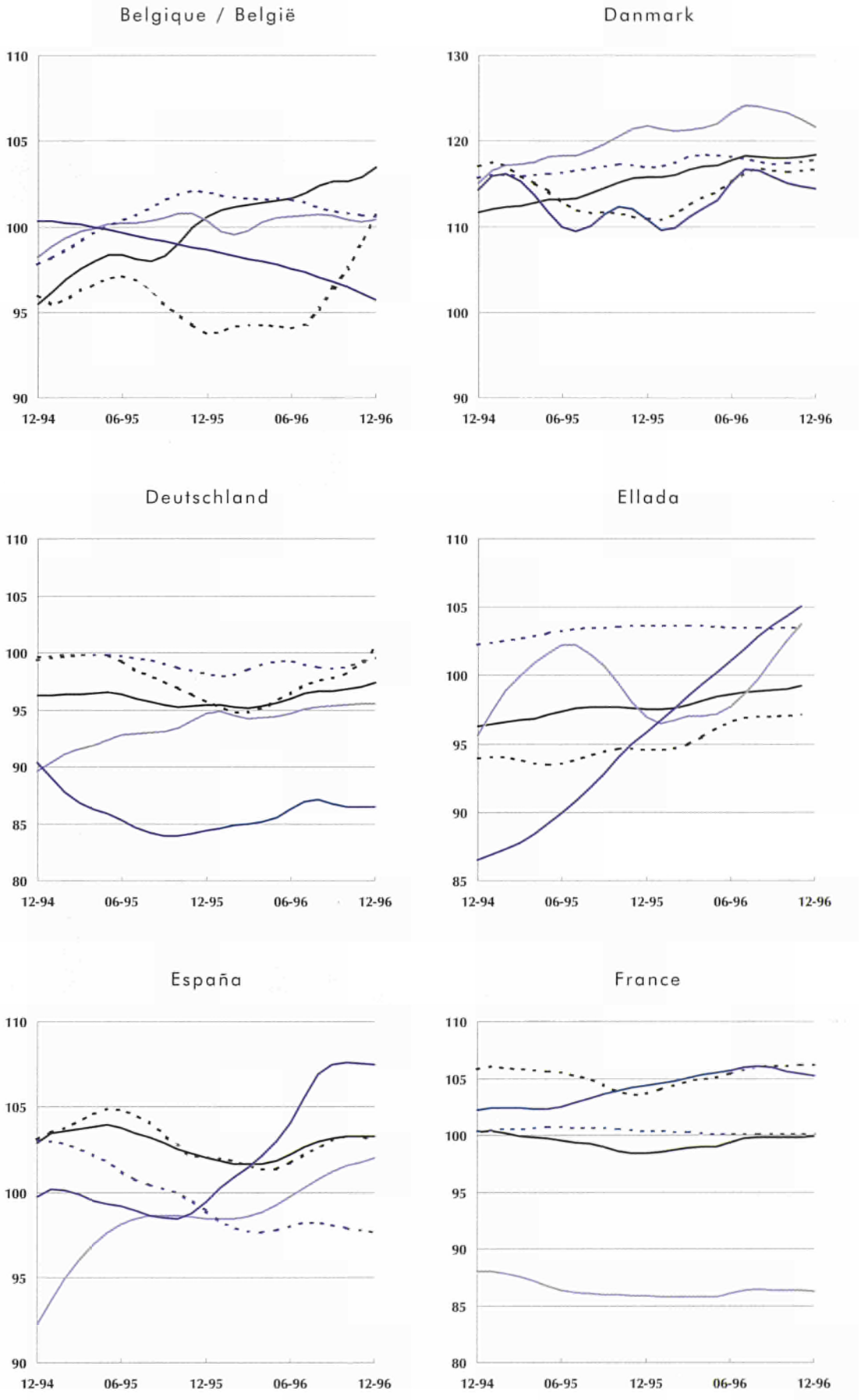
Figure 2.7

Annual growth rates for the production index of consumer non-durables, based on changes from the corresponding three months of the previous year, w.d.adj., Oct-96 to Dec-96 (%)

Source: eurostat

Figure 2.8

Production index by main industrial grouping, trend cycle (1990 = 100)



Source: eurostat

eurostat

PRODUCTION INDEX - TREND CYCLE

Figure 2.8

Production index by main industrial grouping, trend cycle (1990 = 100)

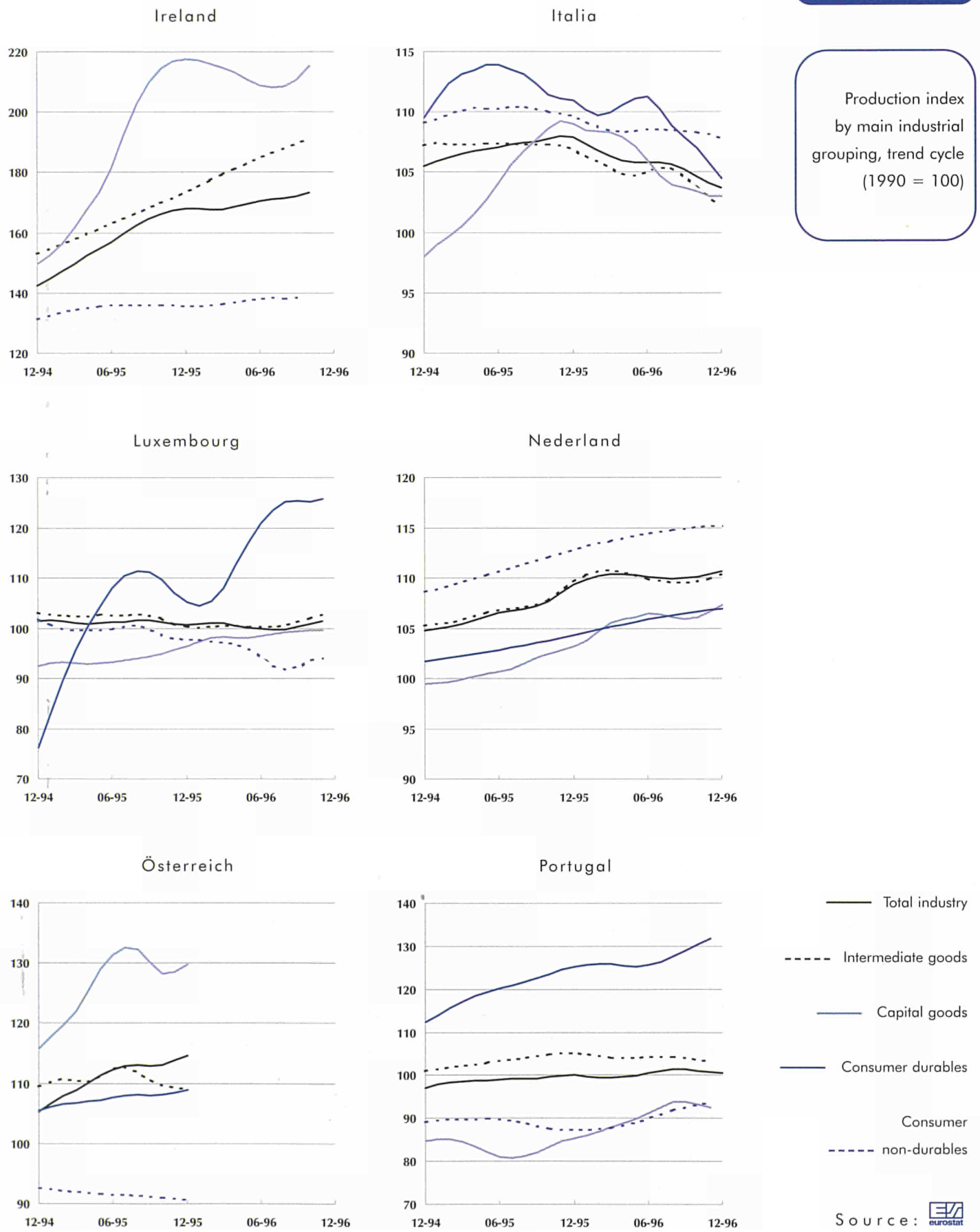
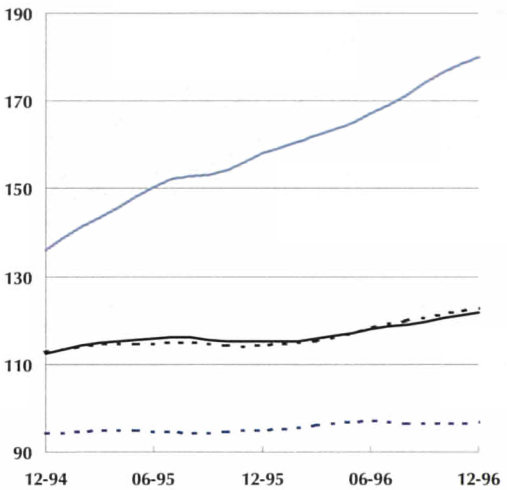


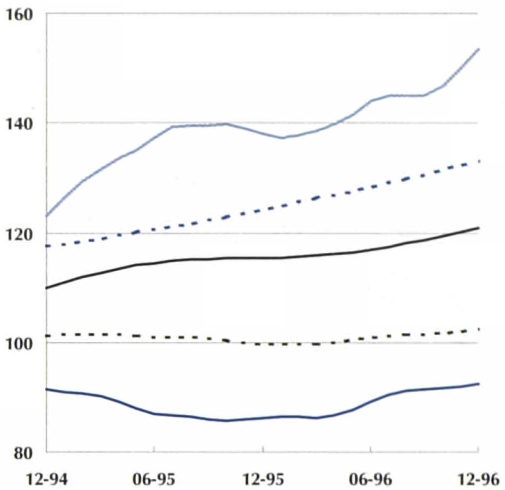
Figure 2.8

Production index by main industrial grouping, trend cycle (1990 = 100)

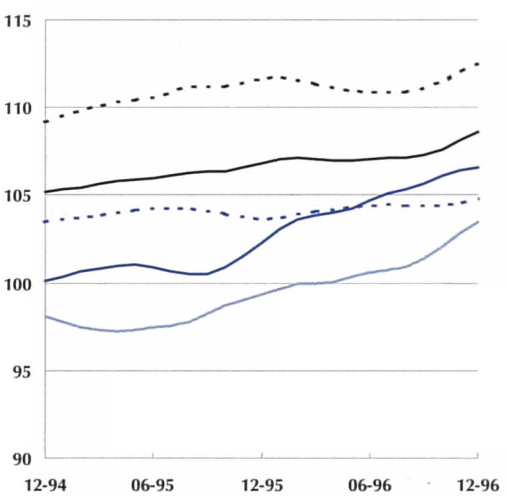
Suomi / Finland



Sverige



United Kingdom



Total industry ——

Intermediate goods - - - - -

Capital goods ——

Consumer durables ——

Consumer non-durables - - - - -

Source: eurostat

Further information - the production index:

The index of production measures changes in volume (at constant prices) of gross value added created by a given activity, the activity indices being aggregated (like the aggregation at Community level) by means of a system of weighting according to gross value added at factor cost.

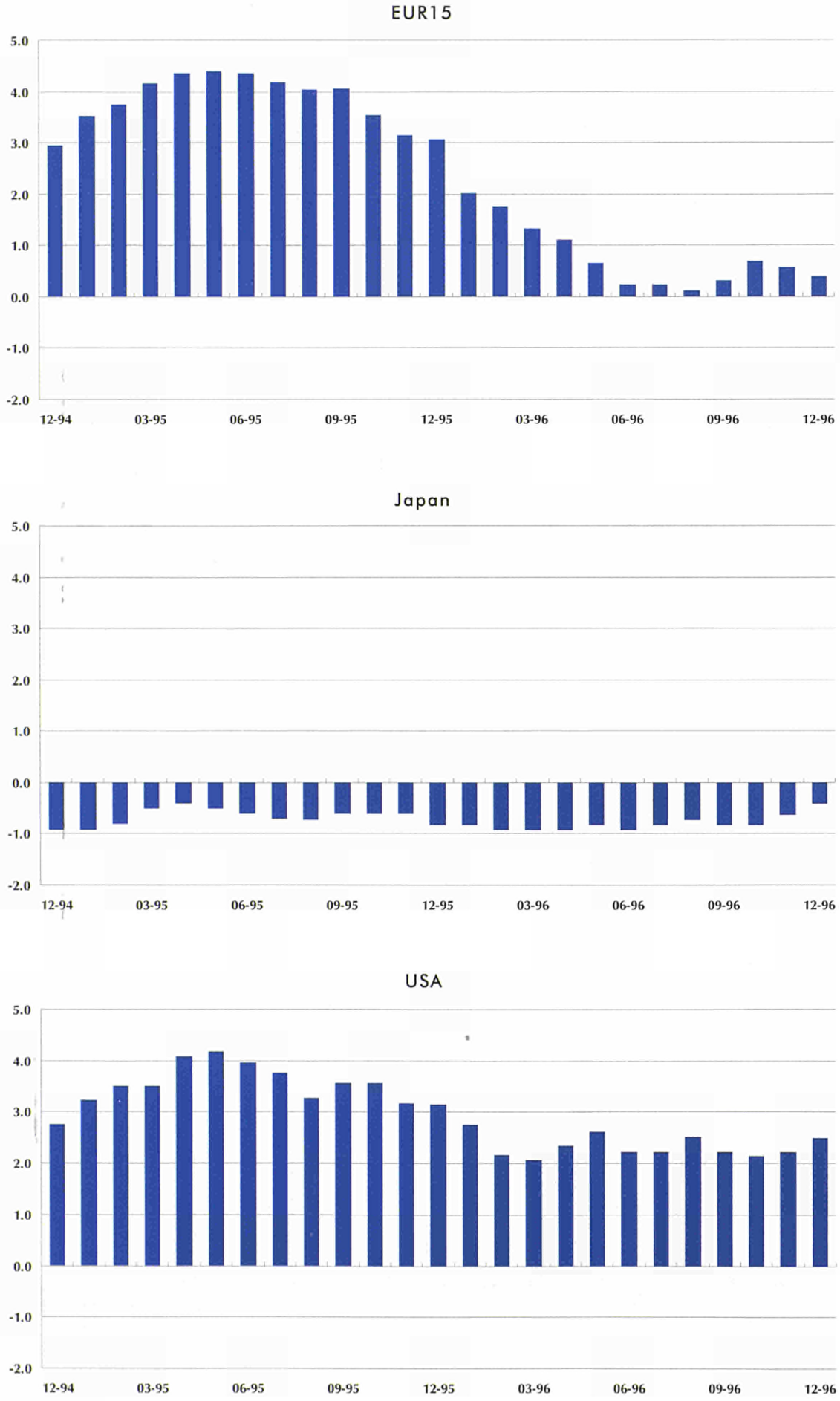
The indices of production are adjusted in two stages. Firstly, account is taken of the variation in the number of working days in the month. The national Statistical Offices provide Eurostat with these series (except Denmark, France, Spain and the United Kingdom). Secondly, for EUR15 and most of the Member States a correction is made using seasonal adjustment with TRAMO / SEATS, a method developed by Professor Maravall and V.Gomez. For France, Ireland, Finland, Sweden and the United Kingdom, the indices are adjusted by the national statistical offices themselves. All data from Ireland is converted to NACE Rev.1 from the old classification NACE 1970 and is therefore less reliable.

Full methodological notes may be found on page 71.

DOMESTIC PRODUCER PRICE INDEX - NATIONAL CURRENCY

Figure 2.9

TRIAD comparison of annual growth rates of producer prices for total industry, in national currency (%)

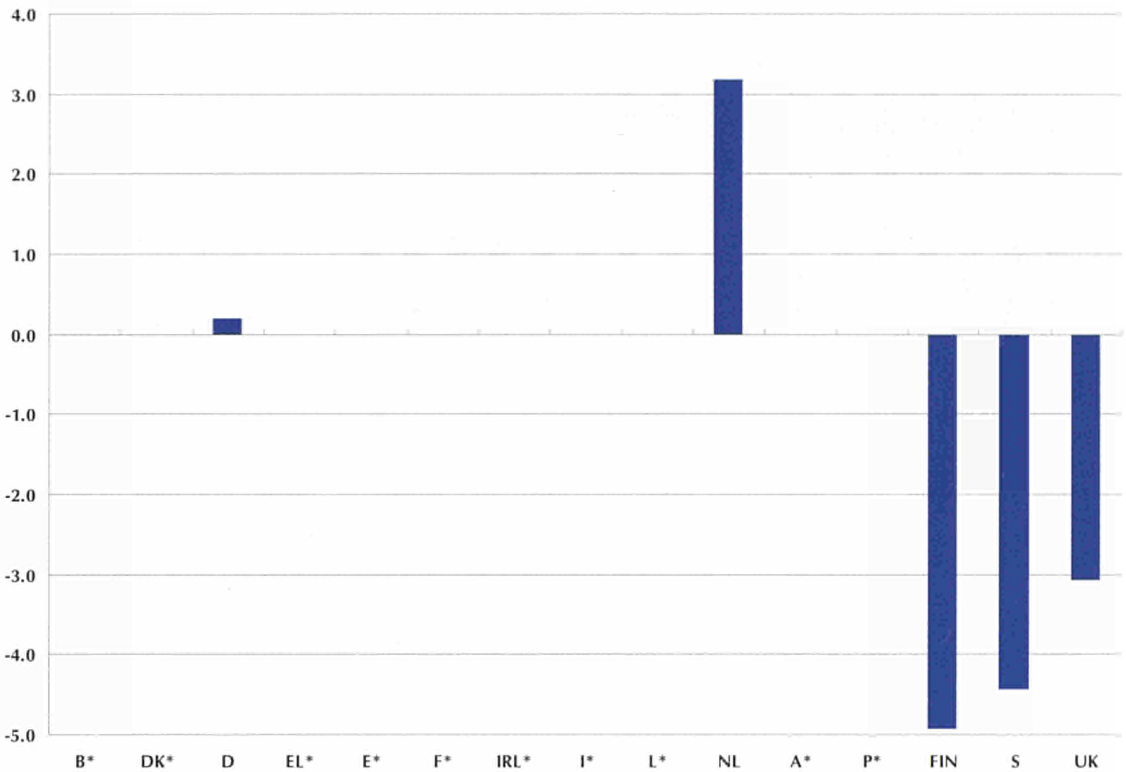


Source: eurostat

EXPORT PRICE INDEX AND DOMESTIC PRODUCER PRICE INDEX

Figure 2.10

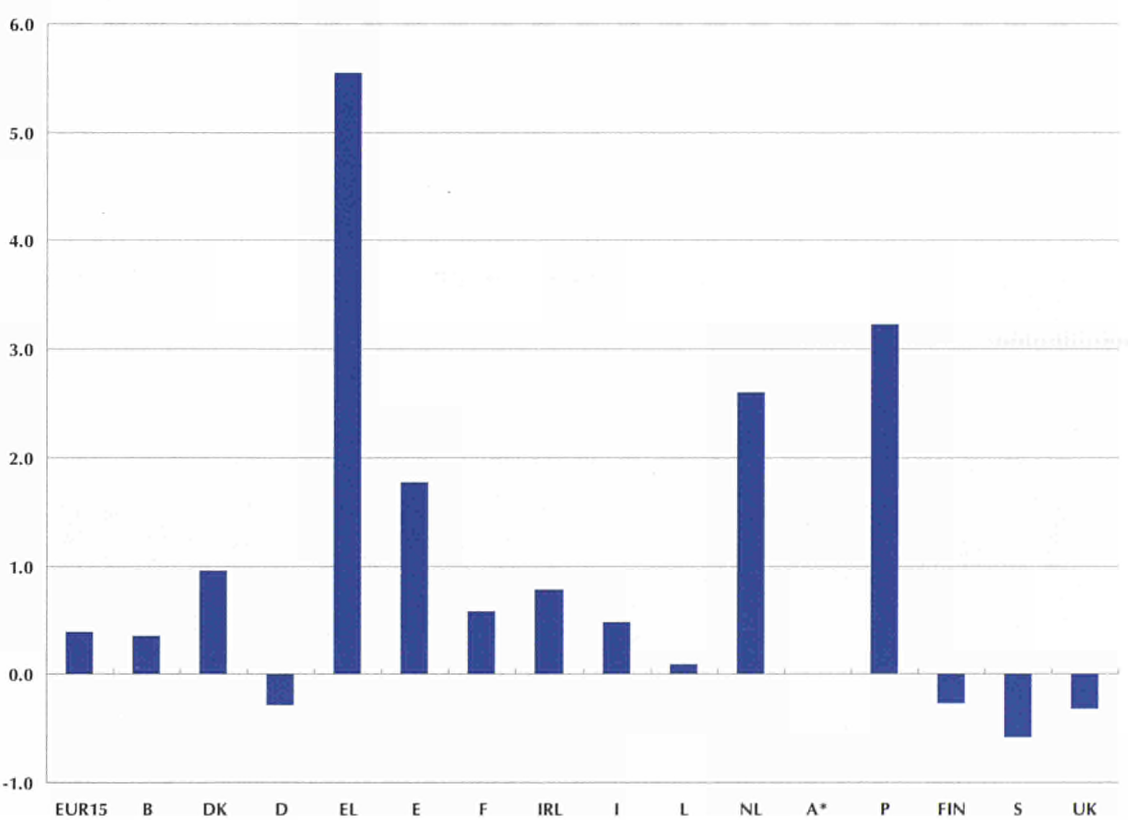
Annual growth rates of export prices for manufacturing industry, in national currency, Dec-96 (1990 = 100)



Source: eurostat

Figure 2.11

Annual growth rates of the producer price index of total industry, in national currency, Dec-96 (%)



Source: eurostat

eurostat

DOMESTIC PRODUCER PRICE INDEX

Table 2.8

	1994	1995	1996	07-96	08-96	09-96	10-96	11-96	12-96
EUR15	108.2	112.4	113.3	112.9	112.9	113.3	113.6	113.7	113.9
B	99.5	101.7	102.4	101.7	101.9	102.8	103.2	102.6	102.8
DK	99.7	103.4	105.1	105.1	105.0	105.5	105.6	105.4	105.6
D	104.7	106.5	106.0	105.9	105.9	106.1	106.3	106.3	106.3
EL	156.6	171.4	184.1	182.9	183.4	186.4	188.0	187.7	188.0
E	109.8	116.8	118.7	118.4	118.4	118.7	119.1	119.3	119.4
F	100.9	103.1	103.6	103.4	103.4	103.8	103.9	103.7	103.7
IRL	107.6	111.6	113.6	114.1	113.5	113.3	113.1	113.5	113.7
I	113.3	122.2	124.3	123.7	123.8	124.1	124.4	124.6	124.5
L	107.2	110.8	110.4	110.3	111.0	110.6	110.7	110.2	110.2
NL	101.0	104.0	105.8	106.0	106.1	106.6	106.8	106.4	106.6
A	:	:	:	:	:	:	:	:	:
P	112.3	116.6	120.2	120.3	120.6	120.8	121.7	121.3	121.4
FIN	105.8	107.7	107.6	106.9	106.8	107.2	107.6	107.4	107.8
S	108.6	117.3	118.0	118.2	118.0	118.1	118.3	117.8	117.6
UK	114.2	118.5	119.4	118.1	118.1	118.7	119.2	120.0	121.4
Japan	96.8	96.1	95.4	95.2	95.2	95.1	95.1	95.2	95.3
USA	103.6	107.3	109.8	110.1	110.3	110.1	110.0	110.2	110.8

Indices of producer prices for total industry, in national currency (1990 = 100)

Source: eurostat

Table 2.9

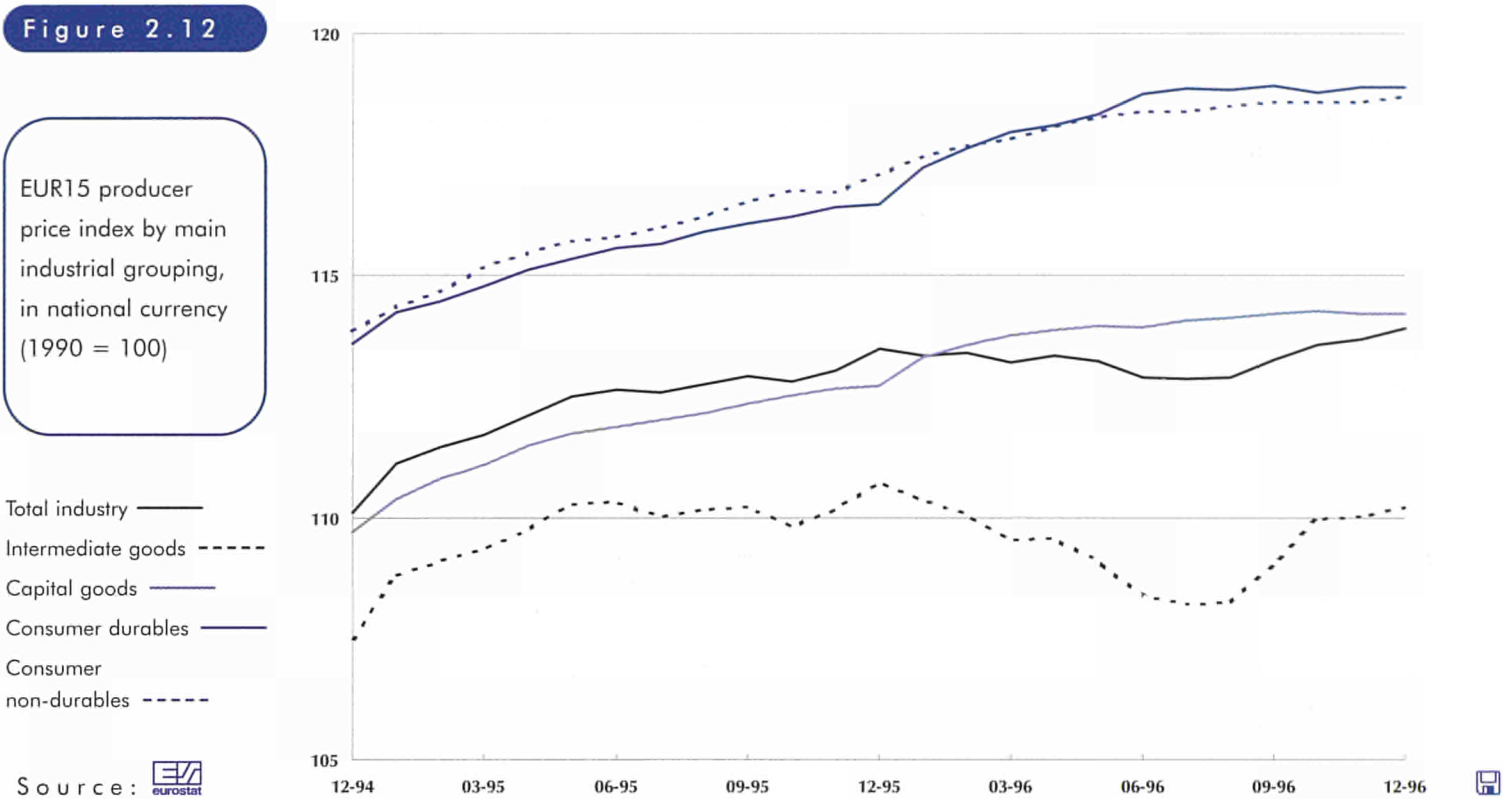
	1994	1995	1996	07-96	08-96	09-96	10-96	11-96	12-96
EUR15	102.4	104.2	106.5	106.2	106.0	106.7	107.4	107.6	108.2
B	106.4	112.0	110.5	109.6	110.3	110.9	110.5	109.4	109.1
DK	103.8	110.9	112.2	112.1	112.2	112.6	112.6	111.7	111.7
D	111.6	116.6	113.9	113.7	114.2	113.9	113.4	113.0	112.4
EL	109.6	114.0	121.5	122.1	121.6	123.6	125.6	124.3	123.5
E	89.4	92.8	95.6	94.9	95.0	95.3	95.2	95.0	94.6
F	106.0	109.2	110.3	110.5	110.1	110.3	110.5	109.8	109.4
IRL	104.2	105.0	110.0	110.6	109.4	110.4	111.0	113.6	115.9
I	90.1	87.3	96.6	97.0	96.8	97.9	98.7	98.1	99.2
L	114.7	121.9	119.2	118.9	120.1	119.2	118.6	117.5	116.9
NL	108.1	114.5	114.3	114.3	115.0	115.0	114.5	113.6	113.2
A	:	:	:	:	:	:	:	:	:
P	103.3	107.7	111.2	110.9	111.8	112.1	113.4	112.6	112.4
FIN	83.1	91.6	89.6	89.1	90.2	90.3	90.8	89.7	90.3
S	89.2	94.7	104.3	105.4	104.5	105.4	107.1	104.7	103.7
UK	105.1	102.0	104.9	103.1	101.8	104.1	107.2	111.5	115.3
Japan	146.5	144.2	126.9	125.9	126.2	125.2	123.4	121.9	122.9
USA	110.9	104.2	109.9	110.1	109.2	110.2	111.1	109.7	112.6

Indices of producer prices for total industry, in ECU terms (1990 = 100)

Source: eurostat

Figure 2.12

EUR15 producer price index by main industrial grouping, in national currency (1990 = 100)



Source: eurostat

Table 2.10

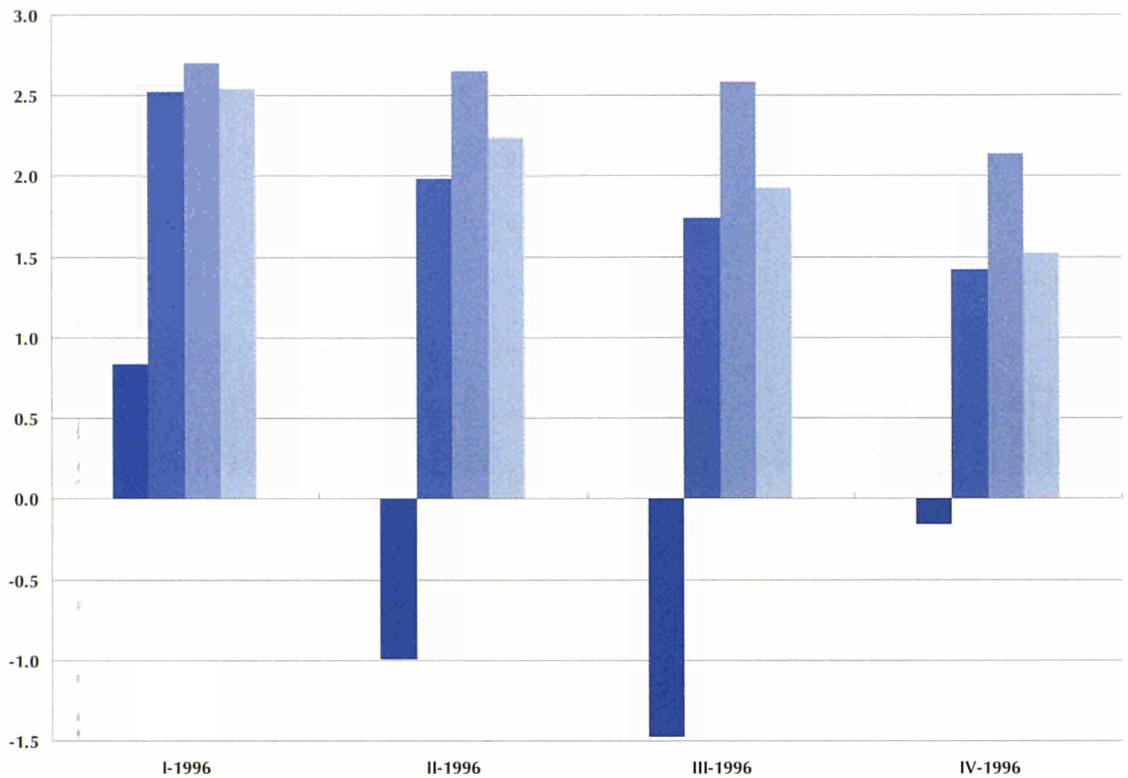
TRIAD comparison of indices of producer prices for the main industrial groupings, in national currency (1990 = 100)

	1994	1995	1996	07-96	08-96	09-96	10-96	11-96	12-96
Total industry									
EUR15	108.2	112.4	113.3	112.9	112.9	113.3	113.6	113.7	113.9
Japan	96.8	96.1	95.4	95.2	95.2	95.1	95.1	95.2	95.3
USA	103.6	107.3	109.8	110.1	110.3	110.1	110.0	110.2	110.8
Intermediate goods									
EUR15	104.9	109.9	109.4	108.2	108.2	109.1	110.0	110.0	110.2
Japan	:	:	:	:	:	:	:	:	:
USA	:	:	:	:	:	:	:	:	:
Capital goods									
EUR15	:	:	:	114.1	114.1	114.2	114.3	114.2	114.2
Japan	:	:	:	:	:	:	:	:	:
USA	:	:	:	:	:	:	:	:	:
Consumer durables									
EUR15	:	:	:	118.9	118.8	118.9	118.8	118.9	118.9
Japan	:	:	:	:	:	:	:	:	:
USA	:	:	:	:	:	:	:	:	:
Consumer non-durables									
EUR15	:	:	:	118.4	118.5	118.6	118.6	118.6	118.7
Japan	:	:	:	:	:	:	:	:	:
USA	:	:	:	:	:	:	:	:	:

Source: eurostat

DOMESTIC PRODUCER PRICE INDEX

Figure 2.13



EUR15 annual growth rates of producer prices for the main industrial groupings (%)

Intermediate goods
Capital goods
Consumer durables
Consumer non-durables

Source: eurostat

Table 2.11

	Latest month available	Total industry	Intermediate goods	Capital goods	Consumer durables	Consumer non-durables
EUR15	12-96	0.4	-0.5	1.3	2.1	1.4
B	12-96	0.4	0.0	0.3	:	-0.2
DK	12-96	1.0	1.7	2.9	2.5	-0.7
D	12-96	-0.3	-1.4	1.1	1.0	0.6
EL	12-96	5.5	5.0	8.5	6.5	5.7
E	01-97	0.8	-0.2	1.7	2.3	1.5
F	01-97	0.7	0.6	-0.8	-0.3	1.0
IRL	12-96	0.8	:	:	:	-0.3
I	12-96	0.5	-0.6	2.2	5.0	1.1
L	12-96	0.1	-8.0	1.7	1.1	3.6
NL	12-96	2.6	2.8	0.3	1.0	0.6
A		:	:	:	:	:
P	12-96	3.2	3.4	:	:	2.9
FIN	01-97	-0.7	-1.6	0.8	-1.4	0.7
S	01-97	-0.3	-1.6	0.7	2.5	1.0
UK	01-97	0.7	-0.4	1.5	1.1	1.6
Japan	12-96	-0.4	:	:	:	:
USA	12-96	2.5	:	:	:	:

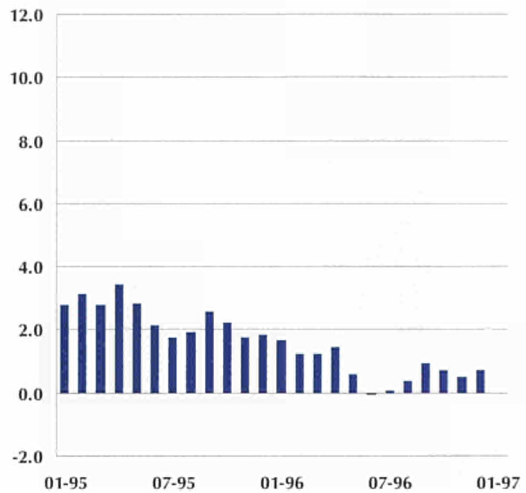
Annual growth rates of the producer price index of the main industrial groupings, in national currency (%)

Source: eurostat

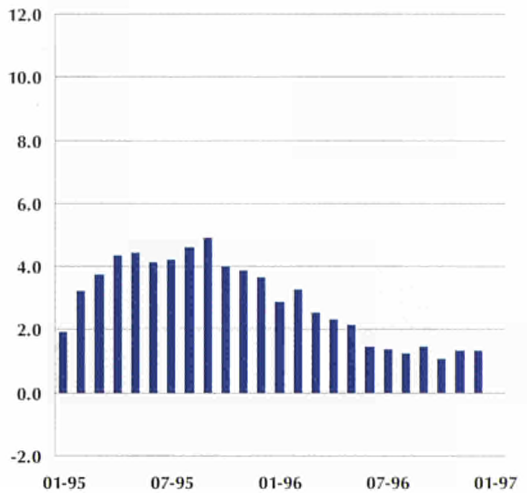
Figure 2.14

Annual growth rates of producer prices for total industry, in national currency (%)

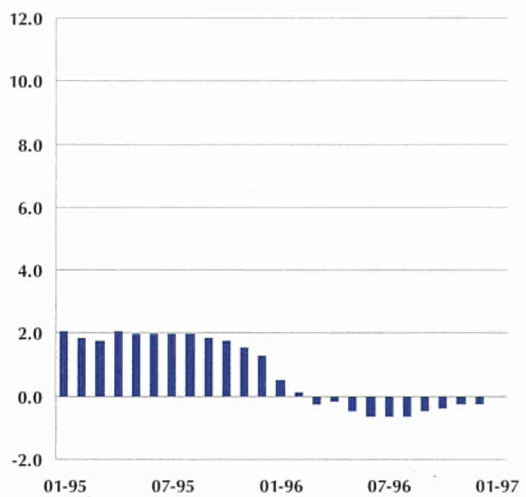
Belgique / België



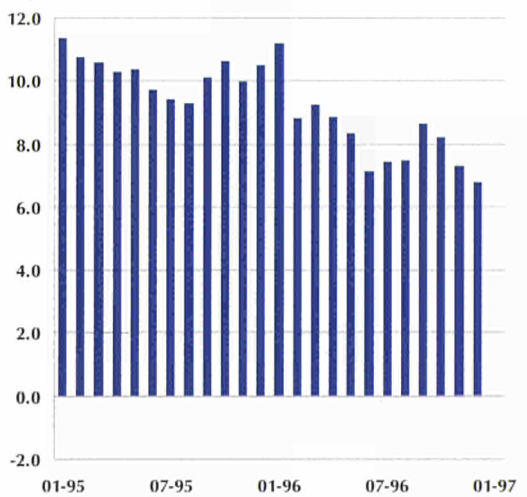
Danmark



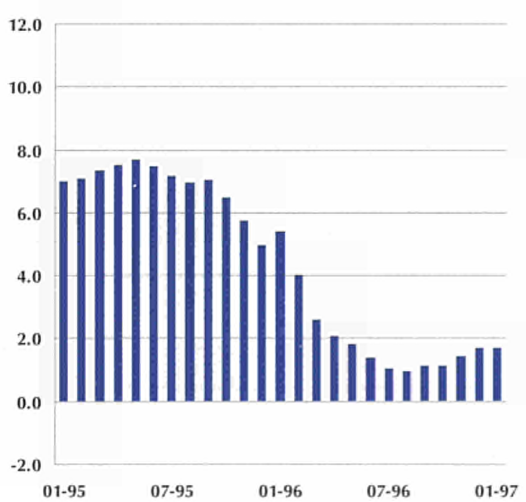
Deutschland



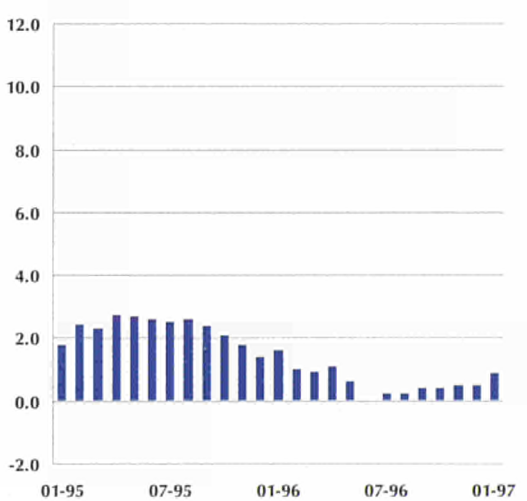
Ellada



España



France



Source: eurostat

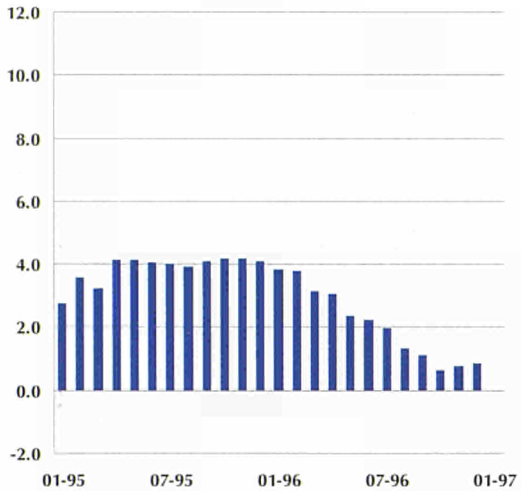
eurostat

DOMESTIC PRODUCER PRICE INDEX

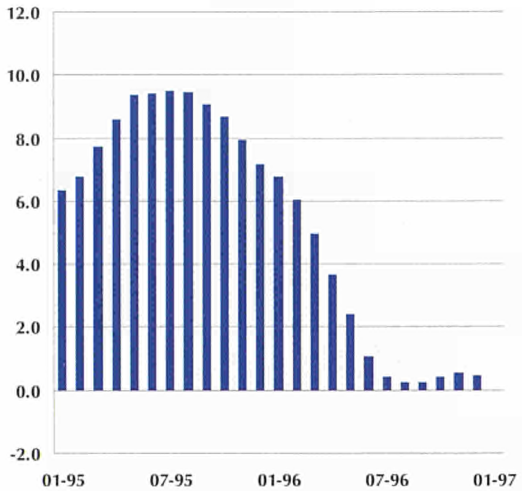
Figure 2.14

Annual growth rates of producer prices for total industry, in national currency (%)

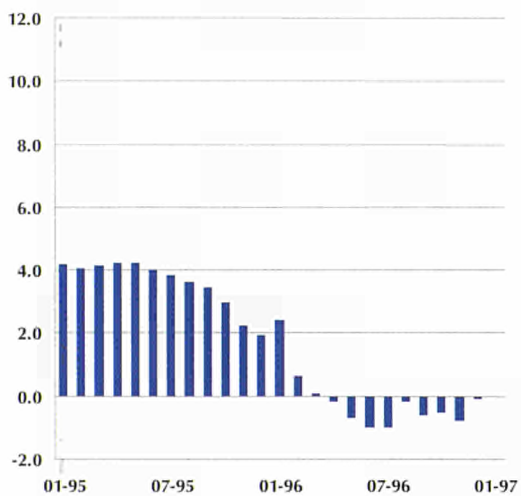
Ireland



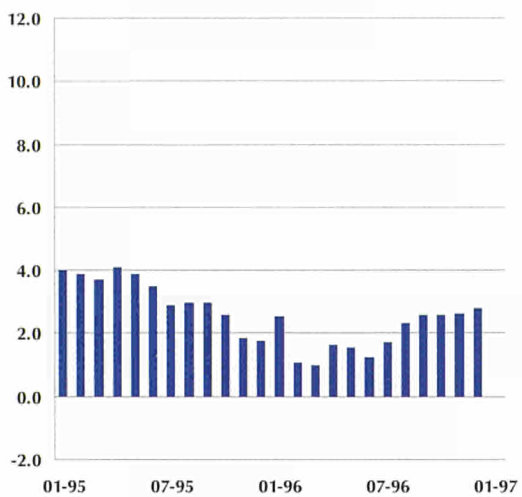
Italia



Luxembourg



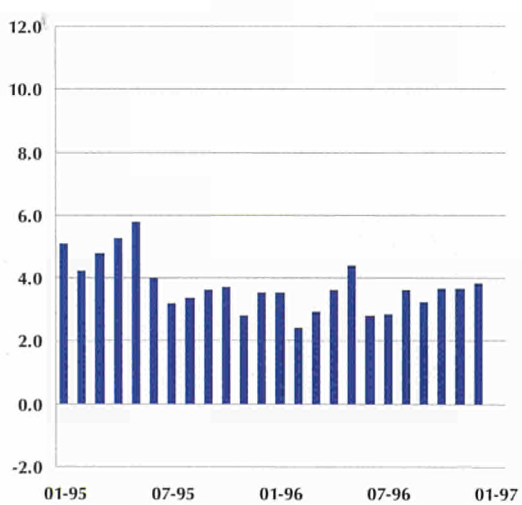
Nederland



Österreich

Not available

Portugal

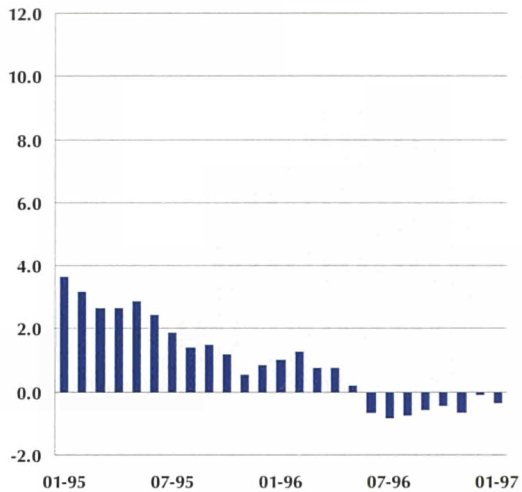


Source: eurostat

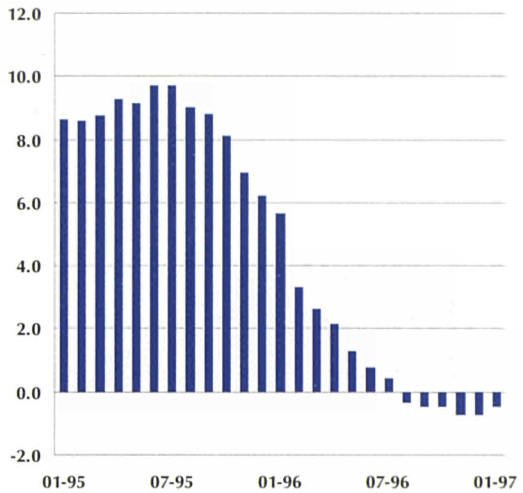
Figure 2.14

Annual growth rates of producer prices for total industry, in national currency (%)

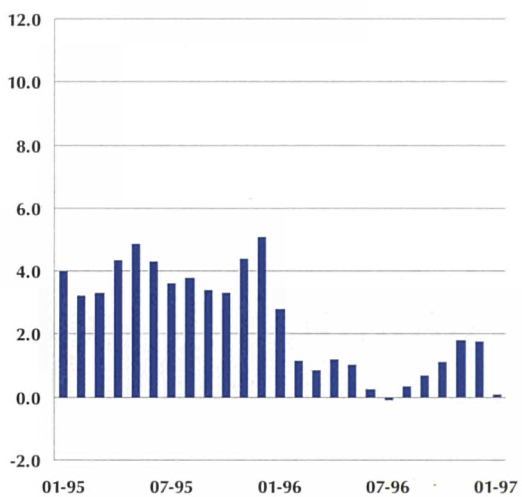
Suomi / Finland



Sverige



United Kingdom



Further information - price indices:

The index of producer prices shows (in the national currency of the Member State in question) changes in the ex-works selling prices of all products sold on the domestic market. Since we deal with producer prices, imports are not included in these price indices. The Community indices (EUR13, since there are no producer price indices for Portugal and Austria) refer to overall weighted price changes. Producer price indices are not seasonally adjusted.

The system used for the collection of export price indices is a duplicate of the model for domestic producer price indices.

All data from Ireland is converted to NACE Rev.1 from the old classification NACE 1970 and is therefore less reliable.

Full methodological notes may be found on page 71.

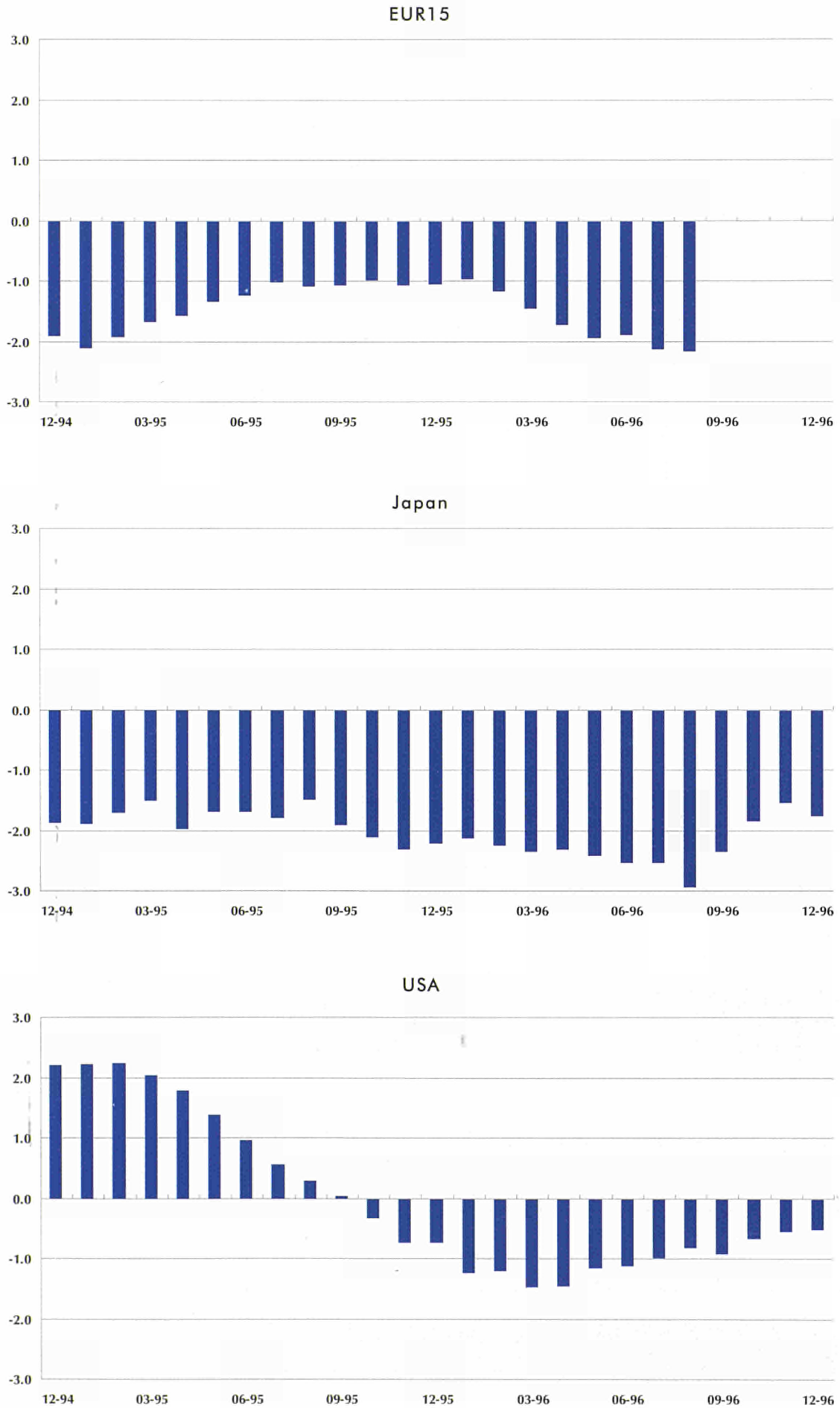
Source: eurostat

eurostat

EMPLOYMENT INDEX - GROSS DATA

Figure 2.15

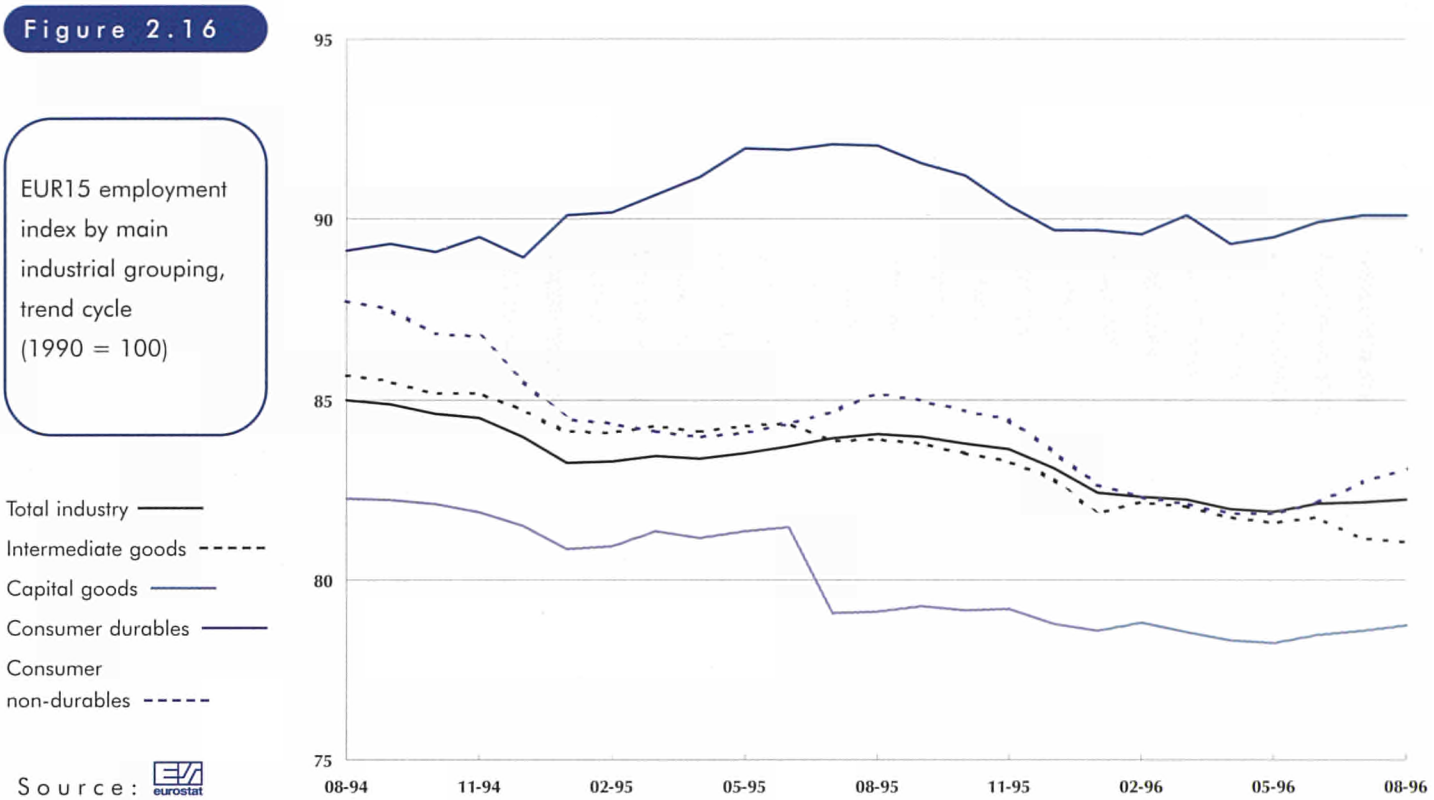
TRIAD comparison of annual growth rates of employment for total industry, gross data (%)



Source: eurostat

Figure 2.16

EUR15 employment index by main industrial grouping, trend cycle (1990 = 100)



Source: eurostat

Table 2.12

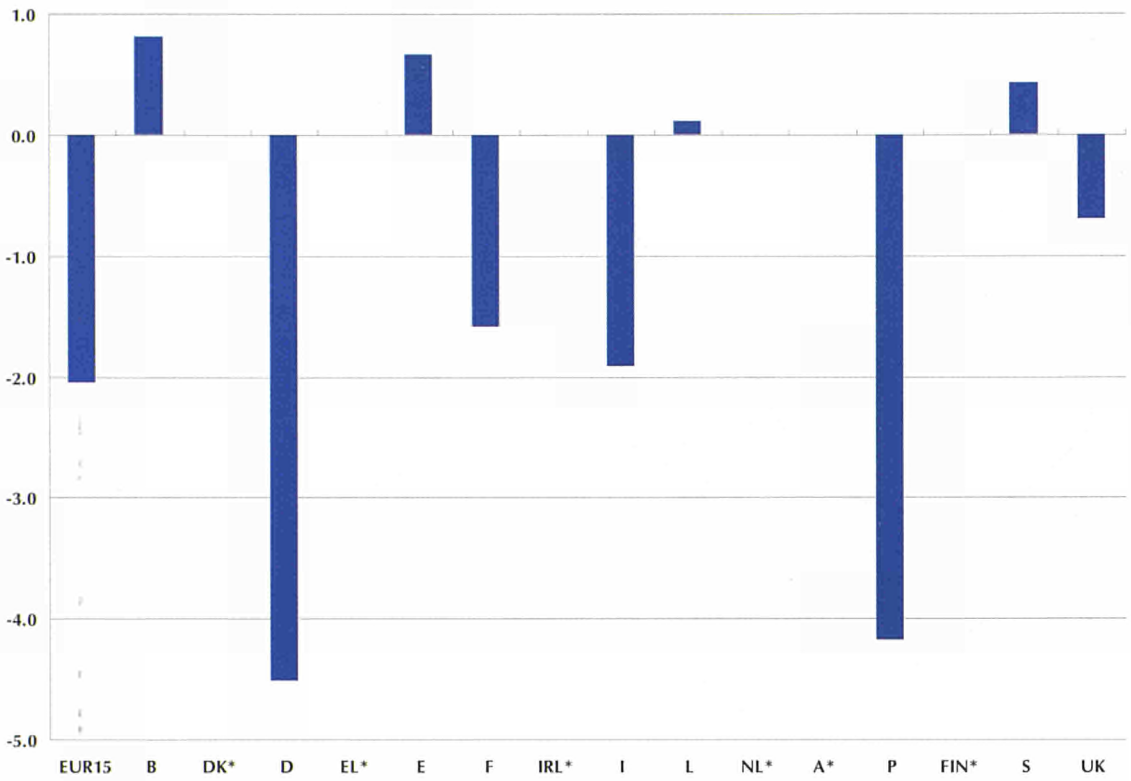
Three month on three month growth rates for the employment index of the main industrial groupings, trend cycle (%)

	Latest 3 months available			Total industry	Intermediate goods	Capital goods	Consumer durables	Consumer non-durables
EUR15	06-96	⇨	08-96	-0.5	-1.0	-0.1	-0.3	-0.6
B	06-96	⇨	08-96	0.1	-0.2	-0.1	:	:
DK	10-93	⇨	12-93	0.2	0.6	-0.3	:	0.0
D	09-96	⇨	11-96	-1.3	-1.8	-1.1	-1.9	-0.9
EL	01-96	⇨	03-96	-0.7	-1.7	-3.2	-1.3	0.1
E	07-96	⇨	09-96	2.0	1.0	4.0	2.7	0.7
F	07-96	⇨	09-96	-0.4	-0.5	-0.3	-0.7	-0.4
IRL	01-96	⇨	03-96	1.4	0.3	4.3	:	:
I	06-96	⇨	08-96	-0.5	-1.1	-0.4	0.4	-0.9
L	09-96	⇨	11-96	-0.7	-0.8	0.8	-2.9	-0.6
NL	10-94	⇨	12-94	-0.3	-0.7	:	:	-0.7
A	10-95	⇨	12-95	-1.0	-0.9	-0.8	1.9	-2.7
P	09-96	⇨	11-96	-0.7	-0.3	-0.5	-0.1	-0.8
FIN		⇨		:	:	:	:	:
S	10-96	⇨	12-96	-0.8	:	:	:	:
UK	09-96	⇨	11-96	0.0	0.0	0.6	-2.2	-0.4
Japan	10-96	⇨	12-96	-0.2	:	:	:	:
USA	10-96	⇨	12-96	0.0	:	:	:	:

Source: eurostat

EMPLOYMENT INDEX - GROSS DATA

Figure 2.17



Annual growth rates for the employment index of total industry, based on changes from the corresponding three months of the previous year, gross data, June-96 to Aug-96 (%)

Source: eurostat

Table 2.13

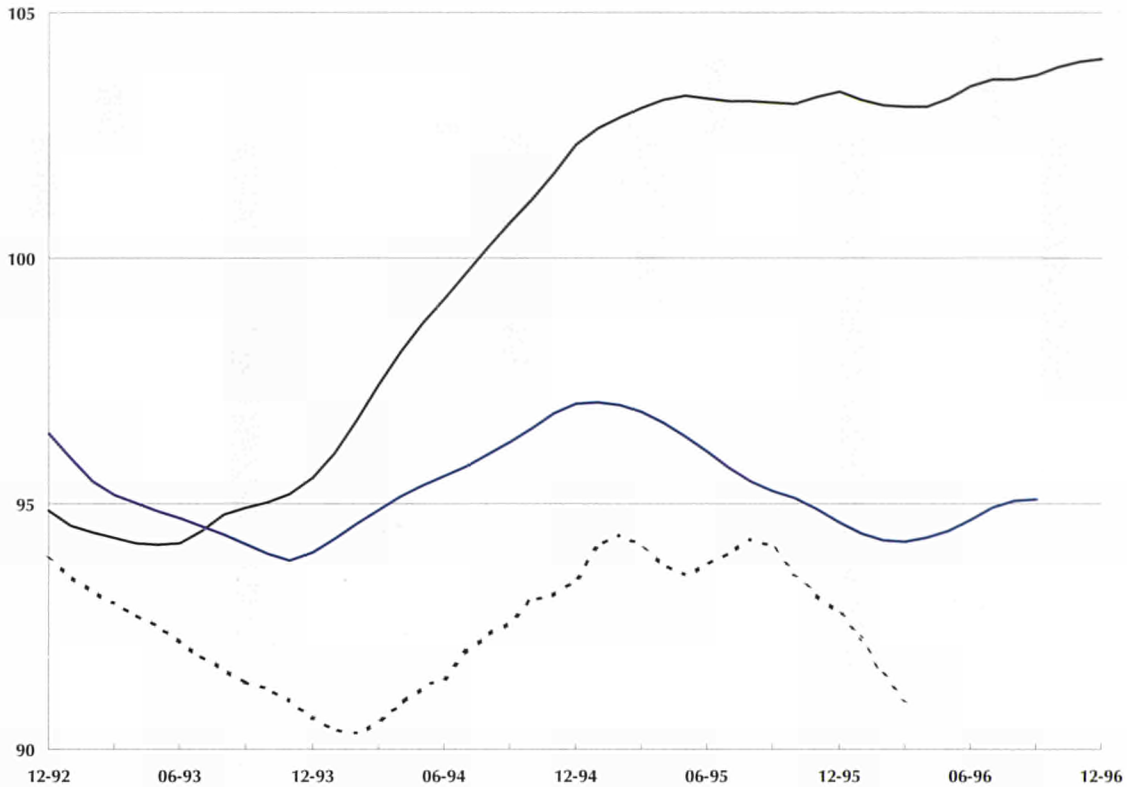
	Latest 3 months available			Total industry	Intermediate goods	Capital goods	Consumer durables	Consumer non-durables
EUR15	06-96	⇨	08-96	-2.1	-3.2	-1.6	-2.1	-2.4
B	06-96	⇨	08-96	0.8	0.4	2.1	:	:
DK	10-93	⇨	12-93	-4.0	-3.4	-7.5	:	-1.6
D	09-96	⇨	11-96	-4.8	-6.5	-3.6	-8.3	-3.5
EL	01-96	⇨	03-96	-2.0	-1.6	4.1	-4.2	-3.8
E	10-96	⇨	12-96	1.4	-0.8	3.6	4.2	1.1
F	07-96	⇨	09-96	-1.6	-1.7	-1.1	-2.2	-2.2
IRL	01-96	⇨	03-96	5.1	3.6	16.1	:	:
I	06-96	⇨	08-96	-1.9	-4.3	-2.0	1.3	-3.7
L	09-96	⇨	11-96	-0.4	0.2	1.6	-8.6	-4.0
NL	10-94	⇨	12-94	-2.8	:	:	:	-4.4
A	10-95	⇨	12-95	-2.0	-0.9	-5.3	7.5	-11.8
P	09-96	⇨	11-96	-4.1	-4.3	-3.7	2.3	-4.9
FIN		⇨		:	:	:	:	:
S	10-96	⇨	12-96	-1.4	:	:	:	:
UK	09-96	⇨	11-96	-0.8	0.7	2.7	-3.2	-0.6
Japan	10-96	⇨	12-96	-1.7	:	:	:	:
USA	10-96	⇨	12-96	-0.6	:	:	:	:

Annual growth rates for the employment index of the main industrial groupings, based on changes from the corresponding three months of the previous year, gross data (%)

Source: eurostat

Figure 2.18

EUR15 production and employment trends in construction, trend cycle (1990 = 100)



Total industry: production index ——

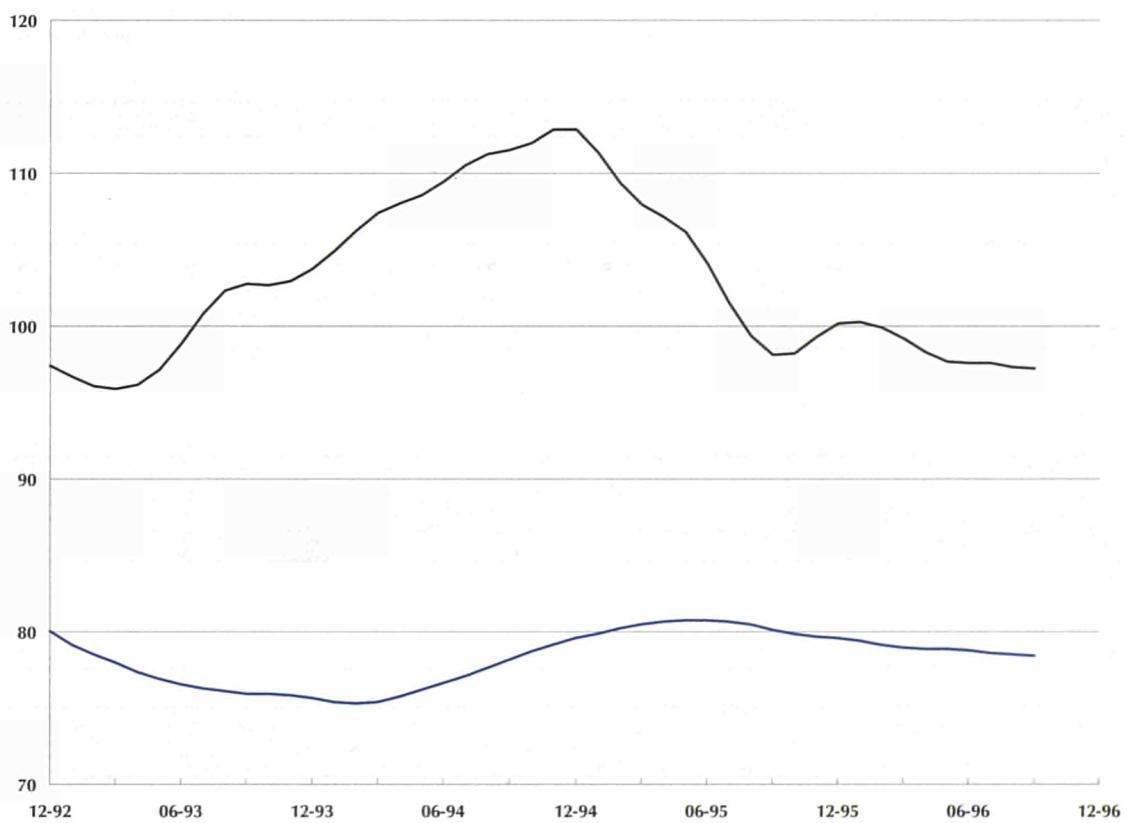
Construction: production index ——

Construction: employment index - - - - -

Source: eurostat

Figure 2.19

EUR15 building permits, trend cycle (1990 = 100)



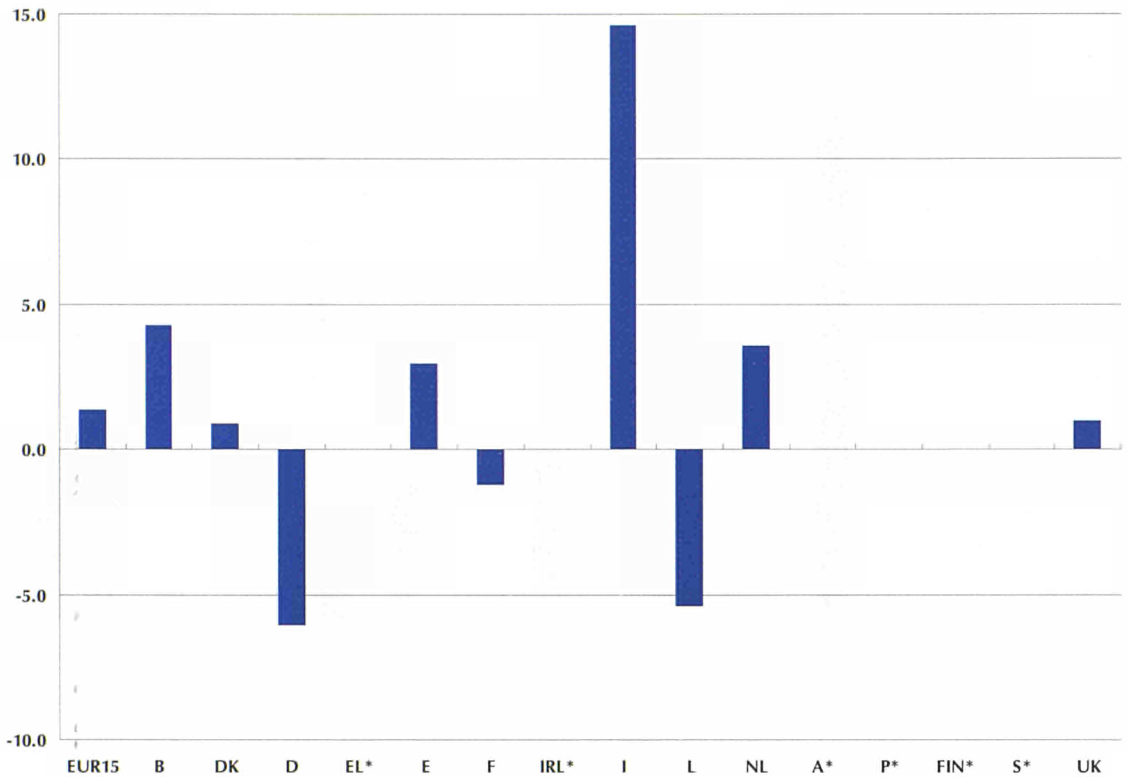
Residential ——

Non-residential ——

Source: eurostat

PRODUCTION INDEX

Figure 2.20



Annual growth rates for the production index of construction activity, based on changes from the corresponding three months of the previous year, w.d.adj., Jul-96 to Sep-96 (%)

Source: eurostat

Table 2.14

	Latest 3 months available			Building t / t-4	Building t / t-1	Latest 3 months available			Civil engineering t / t-4	Civil engineering t / t-1
EUR15	07-96	⇨	09-96	-1.3	0.1	07-96	⇨	09-96	0.6	-3.1
B	09-94	⇨	11-94	26.8	14.0	09-94	⇨	11-94	28.9	24.4
DK	10-96	⇨	12-96	-1.8	-2.2	10-96	⇨	12-96	-10.0	-6.1
D	10-96	⇨	12-96	-6.4	-1.6	10-96	⇨	12-96	-9.8	-4.0
EL		⇨		:	:		⇨		:	:
E	07-96	⇨	09-96	4.0	8.2	07-96	⇨	09-96	8.0	-4.0
F	10-96	⇨	12-96	2.7	-5.8	10-96	⇨	12-96	11.9	-3.7
IRL		⇨		:	:		⇨		:	:
I	10-96	⇨	12-96	1.6	3.8	10-96	⇨	12-96	1.2	-1.0
L	09-96	⇨	11-96	22.7	-0.7	09-96	⇨	11-96	21.6	-9.4
NL	07-96	⇨	09-96	-19.5	-1.4		⇨		:	:
A		⇨		:	:		⇨		:	:
P		⇨		:	:		⇨		:	:
FIN	04-96	⇨	06-96	-3.1	-1.7	04-96	⇨	06-96	25.6	4.9
S		⇨		:	:		⇨		:	:
UK	07-96	⇨	09-96	0.4	1.7	07-96	⇨	09-96	-1.0	-5.4

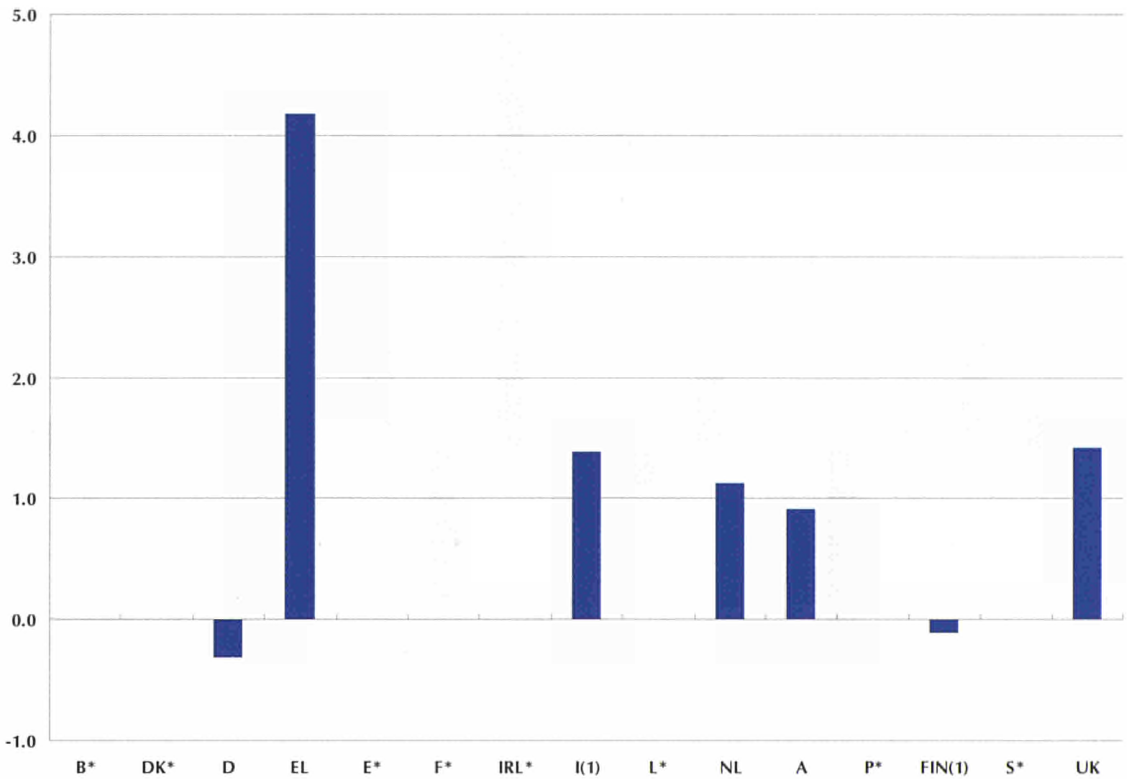
Latest growth rates for the production index of construction (%)

Source: eurostat

PRICE INDICES FOR NEW RESIDENTIAL BUILDINGS

Figure 2.21

Annual growth rates of output prices for new residential buildings, based on changes from the corresponding quarter of the previous year, Jul-96 to Sep-96 (%)



(1) Input prices

Source: eurostat

Table 2.15

Output price indices for new residential buildings, quarterly data (1990 = 100)

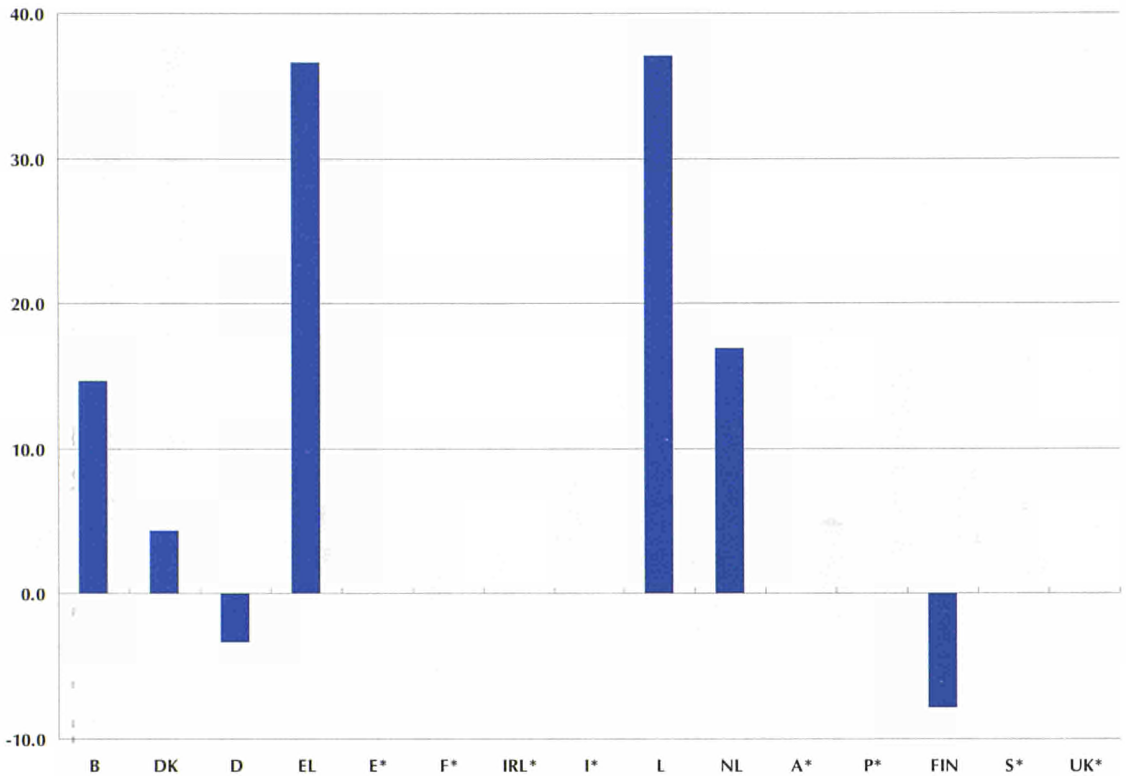
	I-1995	II-1995	III-1995	IV-1995	I-1996	II-1996	III-1996	IV-1996
EUR15	:	:	:	:	:	:	:	:
B	:	:	:	:	:	:	:	:
DK (1)	113.4	115.1	116.0	116.8	117.6	:	:	:
D	123.1	124.5	124.6	124.5	124.2	124.2	124.1	123.8
EL	160.0	161.7	163.0	165.9	170.3	171.7	172.8	174.7
E	:	:	:	:	:	:	:	:
F	106.5	107.7	107.8	106.7	109.3	108.4	:	:
IRL (1)	115.5	115.7	116.5	117.5	117.4	:	:	:
I (1)	121.7	123.3	123.8	123.9	123.9	124.2	126.3	:
L	116.7	116.7	117.7	117.7	118.0	118.0	:	:
NL	118.0	118.0	119.0	119.0	121.0	121.0	121.0	:
A	119.1	120.0	120.5	120.5	121.2	121.8	122.1	:
P	:	:	:	:	:	:	:	:
FIN (1)	102.6	102.4	102.4	102.0	100.8	101.5	102.2	102.7
S	94.1	81.7	99.7	87.7	:	:	:	:
UK	100.2	101.4	102.1	102.4	102.5	102.9	104.0	:

(1) Input prices

Source: eurostat

BUILDING PERMITS - USEFUL FLOOR AREA

Figure 2.22



Annual growth rates of building permits (useful floor area), based on changes from the corresponding three months of the previous year, Aug-96 to Oct-96 (%)

Source: eurostat

Table 2.16

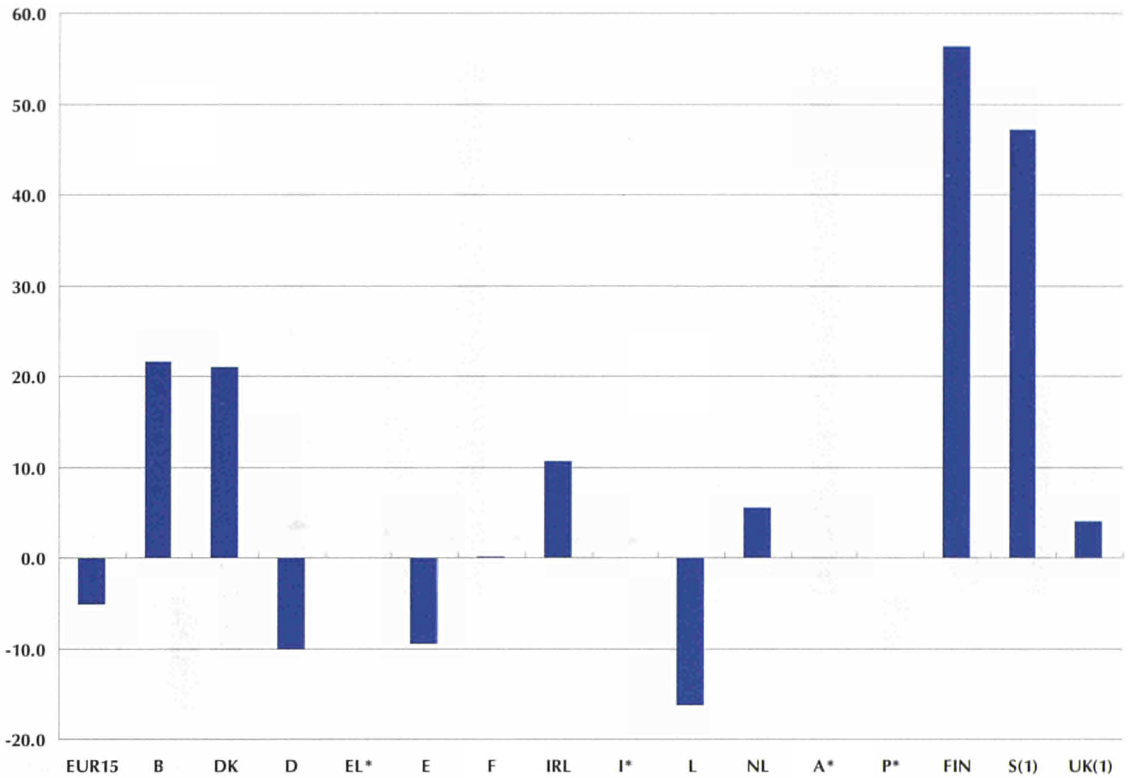
	Latest 3 months available			Residential '000m² 1990=100		Latest 3 months available			Non-residential '000m² 1990=100	
EUR15		⇨		:	:	07-96	⇨	09-96	:	80.7
B	08-96	⇨	10-96	2,646	104.2	08-96	⇨	10-96	1,826	71.9
DK	10-96	⇨	12-96	445	108.1	10-96	⇨	12-96	867	68.7
D	09-96	⇨	11-96	12,162	132.7	09-96	⇨	11-96	10,463	109.6
EL	10-94	⇨	12-94	3,054	84.0	10-94	⇨	12-94	1,098	81.8
E	07-96	⇨	09-96	9,689	95.6	07-96	⇨	09-96	1,419	46.4
F		⇨		:	:	07-96	⇨	09-96	8,990	68.6
IRL	07-96	⇨	09-96	1,270	167.9	07-96	⇨	09-96	885	123.7
I	04-96	⇨	06-96	3,144	65.7	04-96	⇨	06-96	5,281	73.2
L	10-96	⇨	12-96	:	85.8	10-96	⇨	12-96	:	48.7
NL	09-96	⇨	11-96	4,916	149.4	09-96	⇨	11-96	4,539	91.4
A		⇨		:	:		⇨		:	:
P		⇨		:	:		⇨		:	:
FIN	09-96	⇨	11-96	:	43.8	09-96	⇨	11-96	:	41.5
S		⇨		:	:		⇨		:	:
UK		⇨		:	:		⇨		:	:

Building permits (useful floor area) for residential and non-residential buildings (thousand square metres and indices)

Source: eurostat

Figure 2.23

Annual growth rates of building permits (no. of dwellings), based on changes from the corresponding three months of the previous year, Jul-96 to Sep-96 (%)



(1) Buildings starts

Source: eurostat

Table 2.17

Number of dwellings authorised (units)

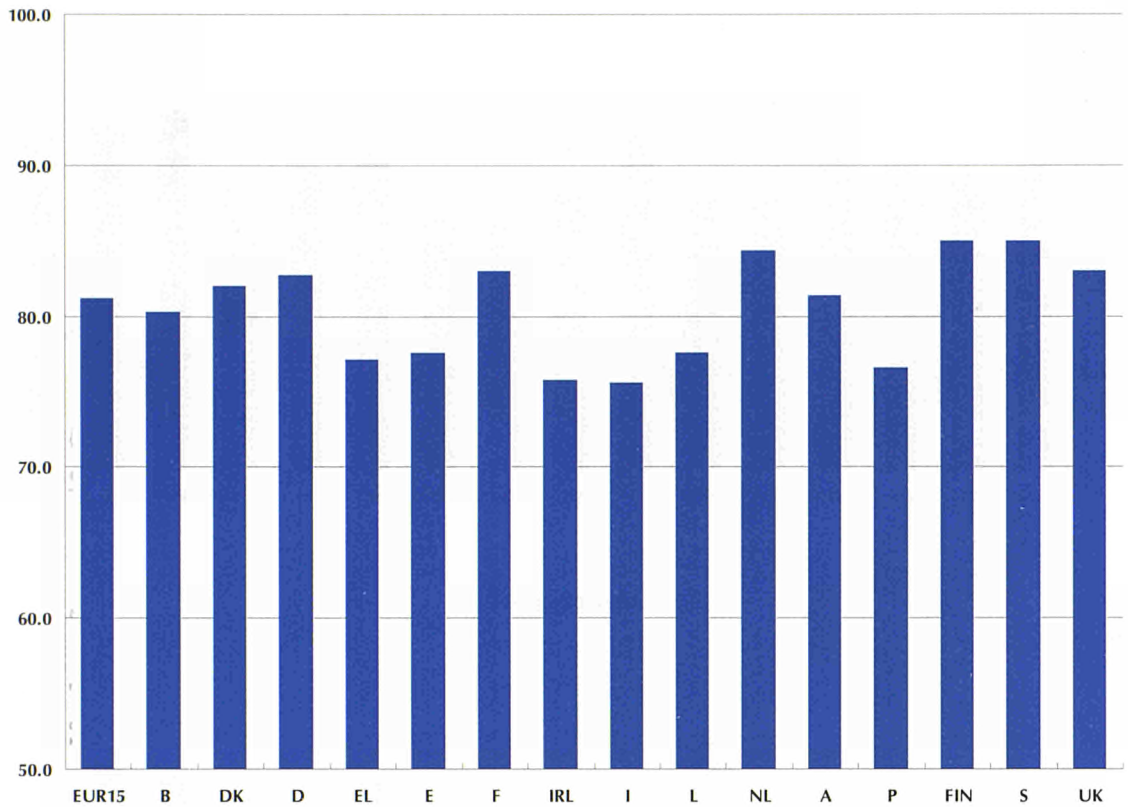
	Latest year available	no. of dwellings	Latest month available	no. of dwellings	no. of dwellings per 1000 inhabitants	Index, 1990=100
EUR15		:	09-96	:	:	96.5
B	1995	44,956	10-96	4,076	0.40	93.7
DK	1996	**15,809**	12-96	**878**	**0.17**	**55.1**
D	1995	639,101	11-96	43,550	0.53	131.7
EL	1994	80,607	12-94	11,765	1.13	117.4
E	1995	282,530	09-96	19,800	0.51	101.8
F	1996	304,186	01-97	25,200	0.43	78.7
IRL	1995	28,837	09-96	3,153	0.88	171.4
I	1995	**173,608**	06-96	**11,000**	**0.19**	**62.7**
L	1996	2,797	12-96	619	1.52	195.7
NL	1995	98,404	11-96	10,519	0.68	140.6
A		:		:	:	:
P	1995	76,946	11-96	7,436	0.75	:
FIN	1995	18,840	11-96	1,761	0.35	36.0
S (1)	1995	12,044	09-96	699	0.08	12.0
UK (1)	1996	172,700	12-96	10,600	0.18	77.5

(1) Buildings starts

Source: eurostat

CAPACITY UTILISATION RATES

Figure 2.24



Capacity utilisation rates for total industry, fourth quarter 1996 (%)

Source: DG II, Business Survey

Table 2.18

Annual growth rate: latest quarter, t / t-4		I-1996	II-1996	III-1996	IV-1996
EUR15	-1.7	81.8	80.8	81.2	81.2
B	0.1	78.7	79.1	79.7	80.3
DK	0.0	81.0	80.0	82.0	82.0
D	-2.2	83.2	82.0	82.6	82.8
EL	-1.4	76.3	73.5	75.1	77.2
E	-0.3	77.5	76.1	77.1	77.6
F	-3.3	84.4	84.7	84.4	83.0
IRL	-7.8	82.1	74.4	76.3	75.8
I	-2.6	78.5	76.0	75.8	75.6
L	-4.9	78.8	80.7	79.0	77.6
NL	0.2	83.6	83.5	84.2	84.4
A	:	80.2	78.6	80.6	81.4
P	-2.5	77.0	76.8	78.2	76.6
FIN	-1.7	84.0	81.2	83.0	85.0
S	:	:	85.0	85.0	85.0
UK	-1.0	82.9	82.1	82.4	83.0

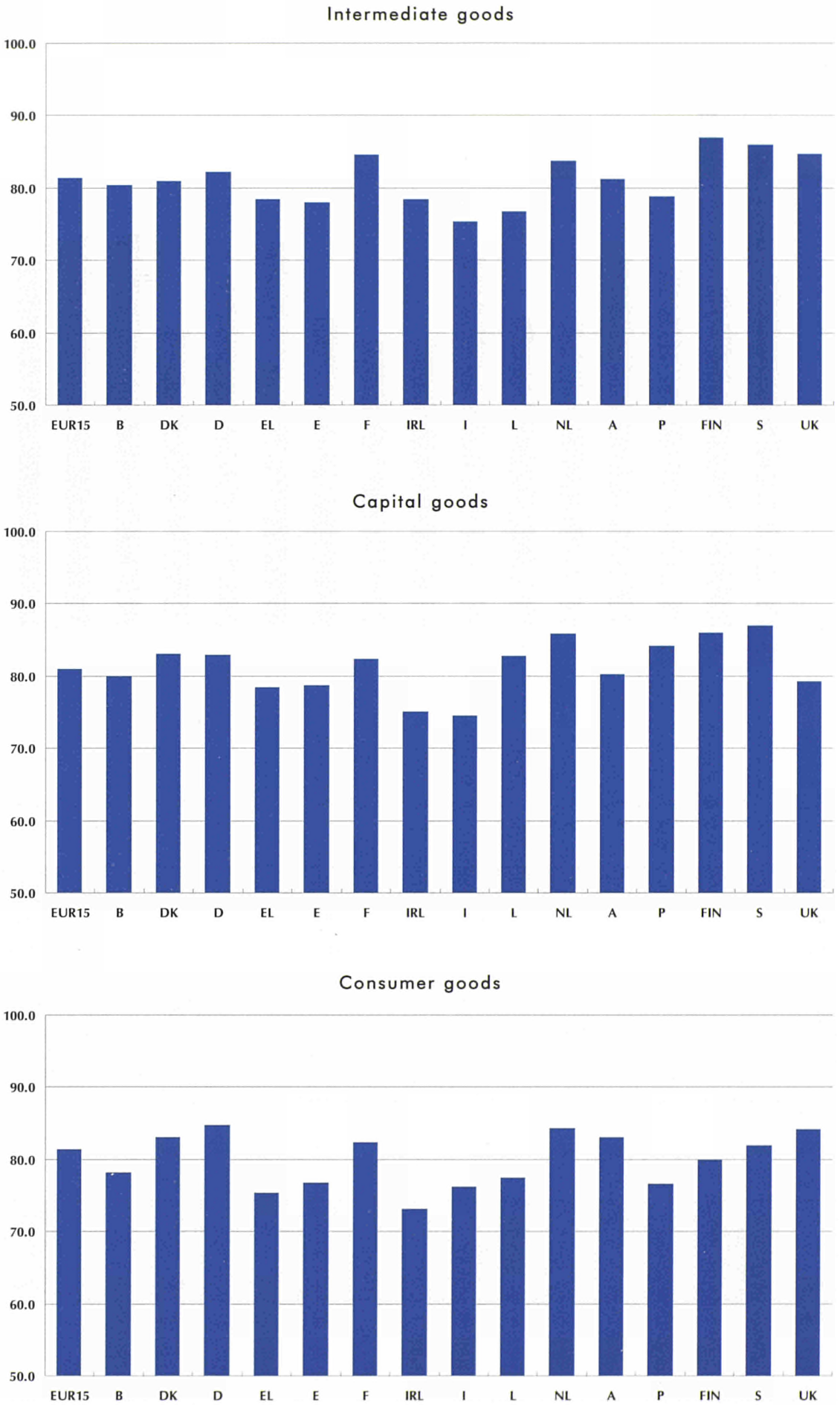
Capacity utilisation rates for total industry (%)

Source: DG II, Business Survey

CAPACITY UTILISATION RATES

Figure 2.25

Capacity utilisation rates for the main industrial groupings, fourth quarter 1996 (%)



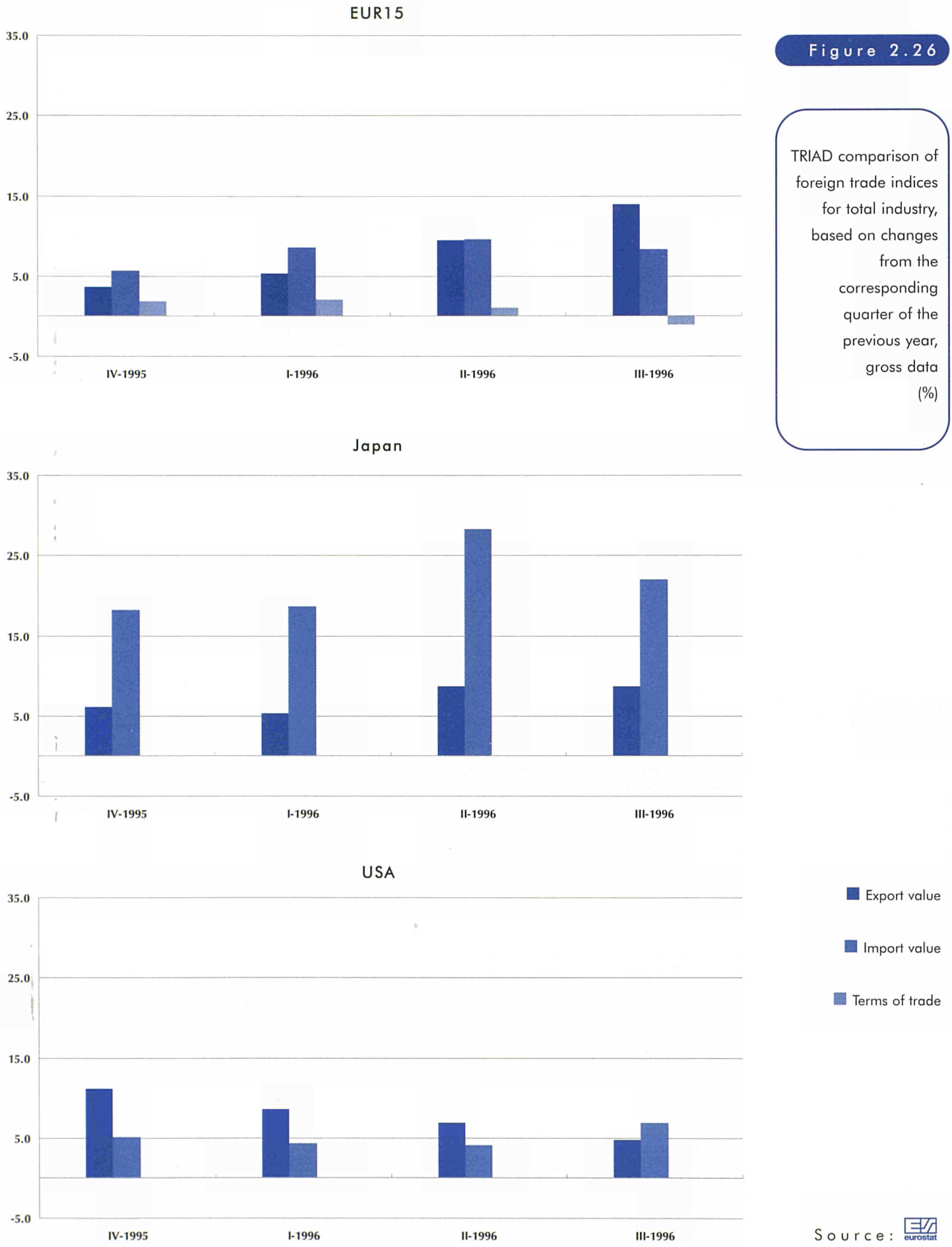
Source: DG II, Business Survey

eurostat

FOREIGN TRADE INDICES - GROSS DATA

Figure 2.26

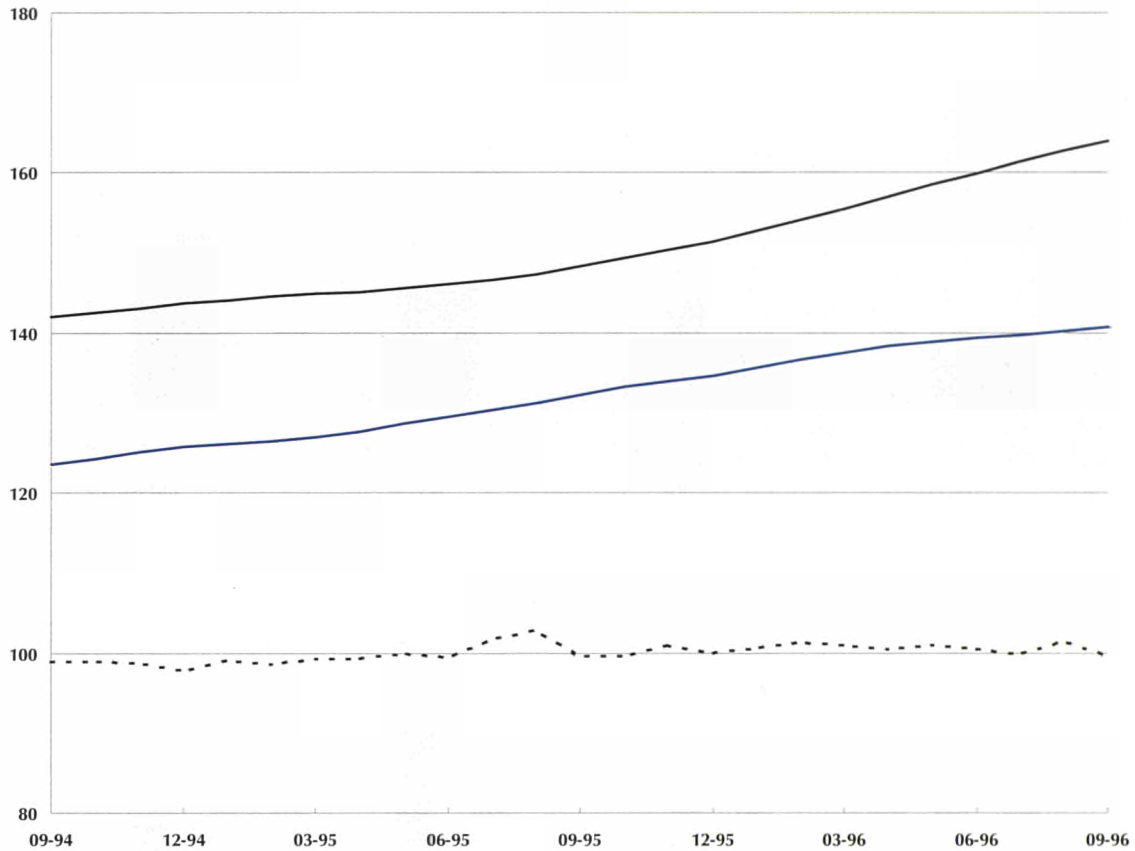
TRIAD comparison of foreign trade indices for total industry, based on changes from the corresponding quarter of the previous year, gross data (%)



Source: eurostat

Figure 2.27

EUR15 foreign trade indices for total industry, trend cycle, in ECU terms (1990 = 100)



Source: eurostat

Table 2.19

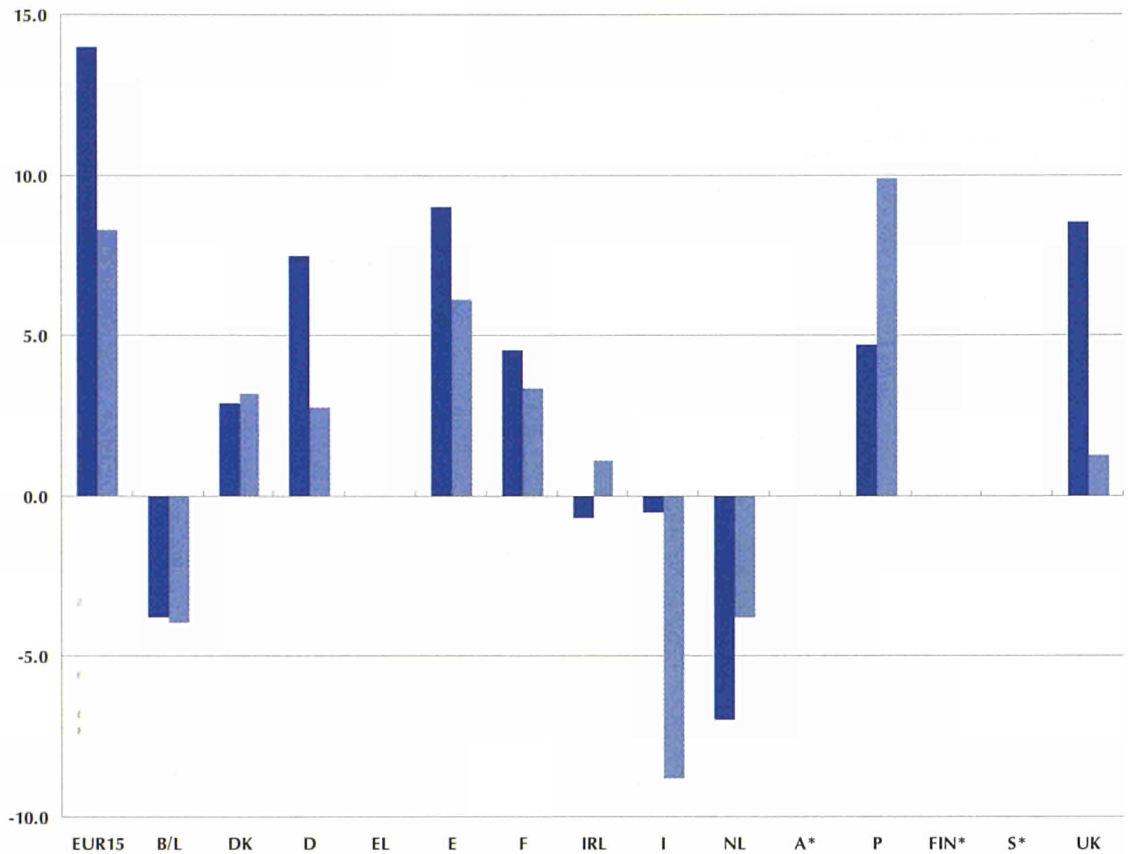
Three month on three month growth rates for foreign trade indices, trend cycle, value indices are in ECU terms (%)

	Latest 3 months available			Exports Value	Exports Volume	Imports Value	Imports Volume	Terms of trade
EUR15	07-96	⇨	09-96	2.7	1.3	1.0	0.5	-0.3
B/L	07-96	⇨	09-96	-1.5	-2.0	-1.8	-2.6	-1.2
DK	07-96	⇨	09-96	1.5	0.6	0.6	1.2	0.5
D	07-96	⇨	09-96	0.8	1.3	0.5	-0.6	-0.3
EL	07-96	⇨	09-96	3.8	10.9	-2.9	-8.0	3.8
E	07-96	⇨	09-96	3.3	1.8	2.7	1.5	-0.9
F	07-96	⇨	09-96	0.9	:	-0.6	-0.2	-1.4
IRL	07-96	⇨	09-96	-3.9	-4.6	-1.2	-2.8	1.9
I	07-96	⇨	09-96	-0.4	-0.1	-3.1	-0.9	1.2
NL	07-96	⇨	09-96	-2.8	-2.2	:	-2.6	-1.3
A		⇨		:	:	:	:	:
P	07-96	⇨	09-96	-1.5	1.4	2.3	2.0	0.8
FIN		⇨		:	:	:	:	:
S		⇨		:	:	:	:	:
UK	07-96	⇨	09-96	1.5	1.3	0.3	-0.9	-0.7

Source: eurostat

FOREIGN TRADE INDICES - GROSS DATA

Figure 2.28



Annual growth rates for foreign trade indices of total industry, based on changes from the corresponding three months of the previous year, in ECU terms, gross data Jul-96 to Sep-96 (%)

Export value
Import value

Source: eurostat

Table 2.20

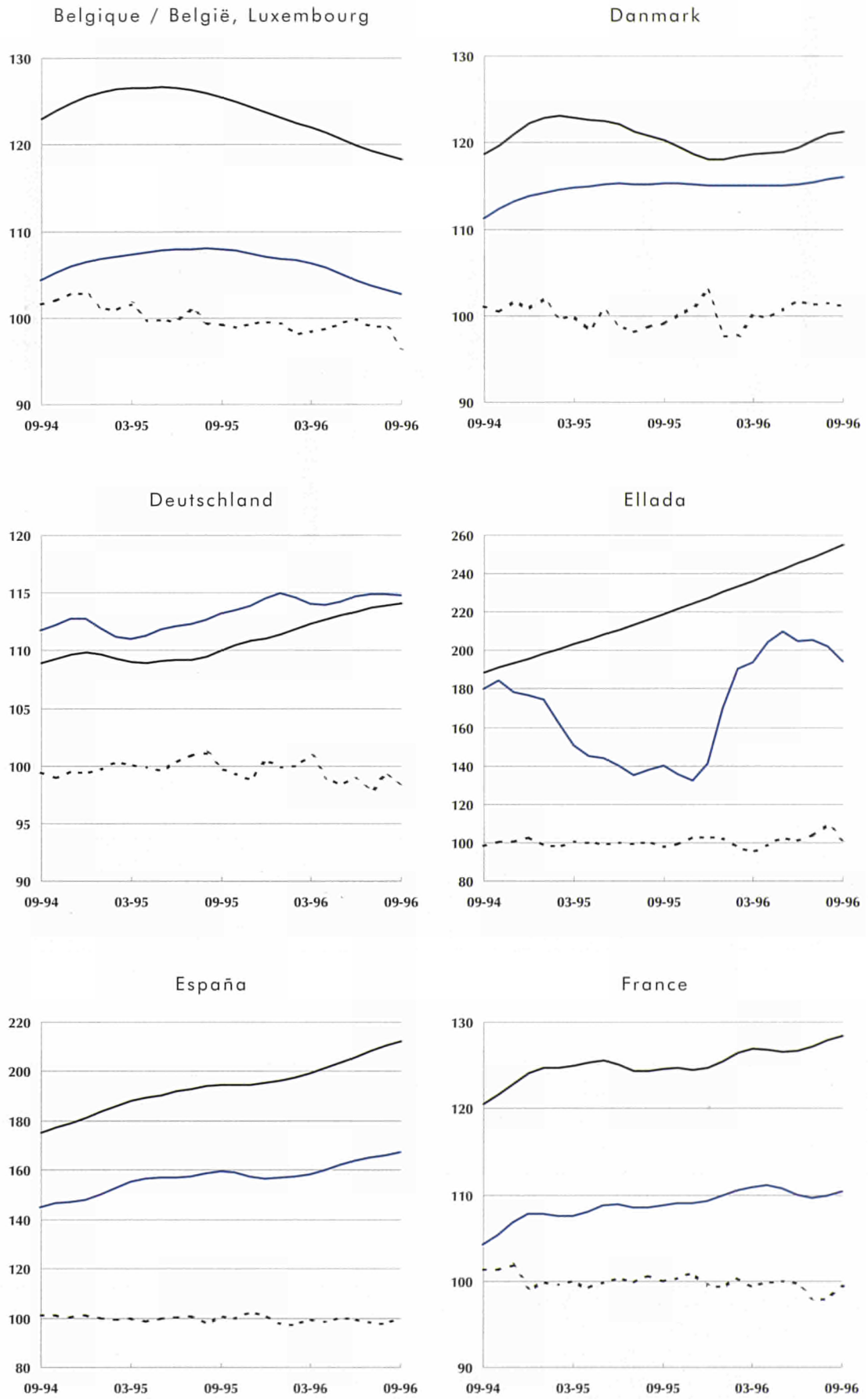
	Latest 3 months available			Exports Value	Exports Volume	Imports Value	Imports Volume	Terms of trade
EUR15	07-96	⇨	09-96	14.0	11.2	8.3	4.5	-1.1
B/L	07-96	⇨	09-96	-3.8	-5.6	-3.9	-7.5	-1.8
DK	07-96	⇨	09-96	2.9	-0.9	3.2	2.1	2.7
D	07-96	⇨	09-96	7.5	7.8	2.8	0.9	-2.2
EL		⇨		:	:	:	:	:
E	07-96	⇨	09-96	9.0	9.1	6.1	4.7	-1.4
F	07-96	⇨	09-96	4.5	5.1	3.3	2.2	-1.7
IRL	07-96	⇨	09-96	-0.7	-3.0	1.1	-5.1	-3.6
I	07-96	⇨	09-96	-0.5	2.3	-8.8	-2.4	4.0
NL	07-96	⇨	09-96	-7.0	-7.5	-3.8	-5.4	-1.1
A		⇨		:	:	:	:	:
P	07-96	⇨	09-96	4.7	6.5	9.9	8.6	-3.1
FIN		⇨		:	:	:	:	:
S		⇨		:	:	:	:	:
UK	07-96	⇨	09-96	8.6	4.6	1.3	-1.8	0.6

Annual growth rates for foreign trade indices, based on changes from the corresponding three months of the previous year, value indices are in ECU terms, gross data (%)

Source: eurostat

Figure 2.29

Foreign trade indices in ECU terms, trend cycle (1990 = 100)



Source: eurostat

FOREIGN TRADE INDICES - TREND CYCLE

Figure 2.29

Foreign trade indices in ECU terms, trend cycle (1990 = 100)

Source: eurostat

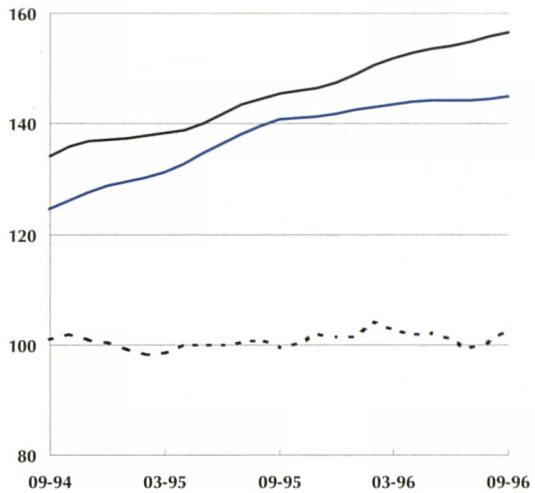
Figure 2.29

Foreign trade indices in ECU terms, trend cycle (1990 = 100)

Sverige

Not available

United Kingdom



Export value index ——

Import value index ——

Terms of trade - - - - -

Further information - employment, construction and trade indices:

Figures showing the number of employees include all persons employed by the firm (manual workers and salaried employees on the firm's payroll).

For the construction activity there are some very specific variables: for details of these please refer to the Eurostat publication "Methodology of Industrial Short-term Indicators" - CA-97-96-079-EN-C.

For the indices of imports and exports, foreign trade data of industrial products (following the nomenclature of the Harmonised System) were grouped according to the industrial NACE Rev.1 activity to which they belong. This grouping of products causes inevitably certain inaccuracies which can reduce the reliability of these foreign trade series. The indices for EUR15 refer only to extra-Union trade, the indices for Member States reflect also intra-Union trade.

Full methodological notes may be found on page 71.

Source: eurostat

Structural indicators

value-added, production,
employment and labour costs

External trade

extra-EU exports and extra-EU imports

Short term indicators

production index, producer prices,
capacity utilisation, foreign trade indices

data extracted on: 10/3/97

For full methodological notes and an explanation of the signs and abbreviations used in this publication, please refer to page 71

In this section:

Enquiries regarding the purchase of data should be directed to:
Eurostat Data-Shop
tel: (352) 4335 2251
fax: (352) 4335 22221

Data marked with this symbol is available on the diskette - for further details see page 70

Description of the industry

The rubber and plastics processing industries are presented jointly on account of the very close links which exist between them - the use of similar machinery - and the fact that they both process hydrocarbon-based polymers.

There are almost 5 000 types of polymers, including PVC and polystyrene. The processing of plastics requires the use of a variety of techniques such as extrusion, moulding and hot stamping. Plastic products are destined both for consumers and for intermediate consumption in the construction industry, the automobile industry (as a substitute for metals) and the packaging industry, which accounts for one-third of total demand.

The rubber industry is made up of two branches: the first produces tyres and inner tubes mainly for road transport vehicles, and the second covers the manufacture of rubber goods for intermediate and direct consumption. It includes seals, rubber soles and belts and supplies the chemical, building and mechanical engineering industries.

Short-term economic trends

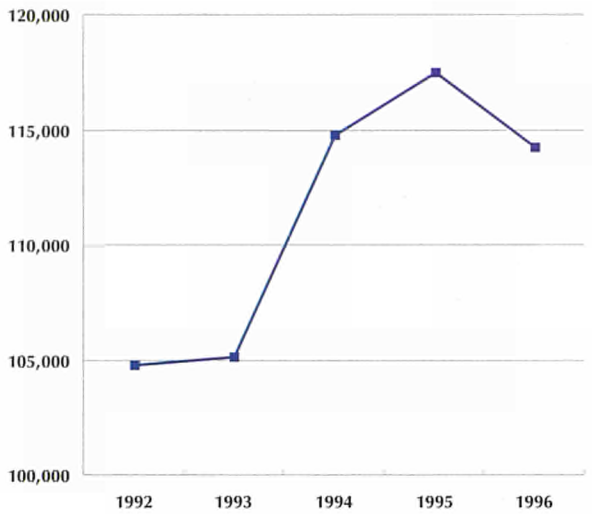
The percentage change in output by the rubber and plastics industries between the third and fourth quarters of 1996 was -0.3% for EUR15, +1.1% for Germany, -1.4% for Italy and -0.7% for the United Kingdom. Output fell as well in France and Denmark by 2.1% and 1.1% respectively. Annual production in EUR15 between the last quarters of 1995 and 1996 rose by 0.2%. Spain (8.8%) and Portugal (13.8%, Eurostat's estimate) recorded appreciable increases, whilst output fell in the United Kingdom (-0.2%), Belgium (-0.7%) and Italy (-3.2%). Over the last three years, the

Please note that the figures in this section refer to NACE Rev.1 Division 25, i.e. all data concerning rubber and plastics.

Producer prices in EUR15

fell by 0.4% in 1996

Figure 3.1



EUR15 production in constant prices (million ECU)

Source: DEBA GEIE

production index in Germany peaked in December 1994 - at the same time as in France - and reached its low point in March 1996, whereas in France it bottomed out in October 1996. Peak production activity in EUR15 was reached in spring 1995, whereas the minimum level was recorded in May 1996.

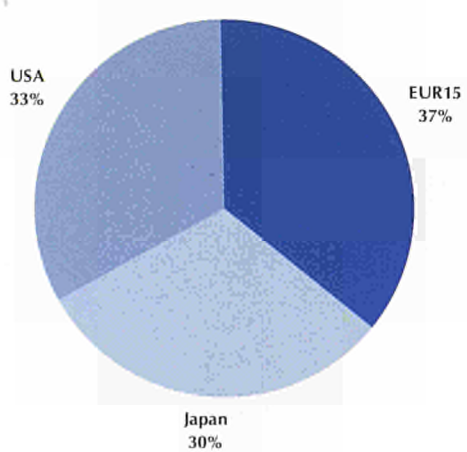
In 1996, producer prices fell by 0.4% in EUR15, following the pattern set in the main producer countries - Germany (-0.7%), France (-1.2%) and the United Kingdom (-0.3%). In Italy (0.0%) and Spain (+0.3%), on the other hand, the figures either rose slightly or stagnated. The trend in the EUR15 price index between 1994 and 1996 shows an upturn in the summer of 1994, a high point in August 1995 and virtual stagnation throughout 1996. Price levels fell steadily in France and stabilised in Germany after reaching their minimum levels in the spring.

The growth rate in the value of extra-Community exports between the second and third quarters of 1996 amounted to 2.9% for the EU; for total exports 2.1% in Germany and 4.7% in France, but they fell by -1.7% in the United Kingdom and by -7.6% in the Netherlands. The corresponding rates for imports were +1.5% for the EU, 3.4% for Germany, 0.1% for the United Kingdom and -3.1% for Italy.

Structure of the industry

The rubber industry depends mainly on the automobile industry which accounts for 90% of the total demand for tyres. The search for greater competitiveness and the rationalisation of production costs in the automobile industry have, therefore, led to changes in the production system, and tyre manufacturers have been forced to meet consumers' demands by expanding their ranges and offering products which are longer-lasting and cheaper and are adapted to specific traffic conditions. One-third of the tyres sold are original equipment, and the other two-thirds are replacement tyres. The first effect of this rising level of sophistication in tyre design was higher prices for the lead-

Figure 3.2

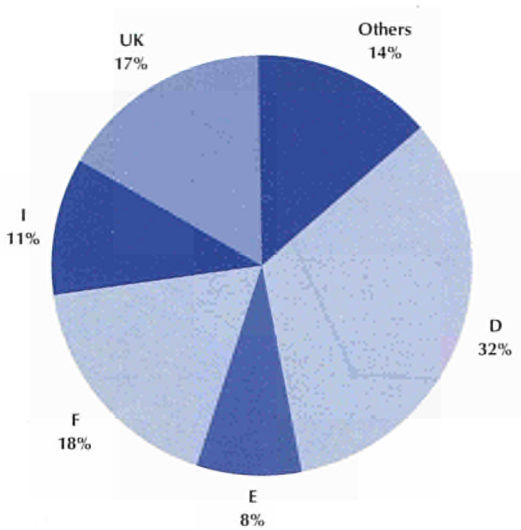


Share of production value for the TRIAD, 1996

Source: DEBA GEIE

Figure 3.3

Share of EUR15 value-added at factor cost, 1996



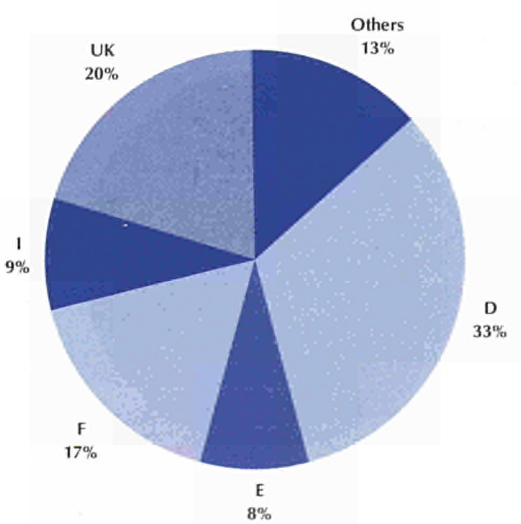
Source : DEBA GEIE

Community production has been rising since May 1996

ing brands. This created openings in the lower-cost tyre segment which encompasses private brands, companies' affiliated brands and new brands from Asia and eastern Europe. This proliferation of brands in the range of standard products caused prices to fall and led to an increasing tendency for specialisation and market segmentation. In addition, the penetration of the market by low-cost products from outside the Community caused the import/consumption ratio to deteriorate. In view of the pressure applied by the consumer industries compounded by stiffer competition within the tyre sector, the rubber industry opted for a policy aimed at increasing productivity by means of a wave of mergers and takeovers and the development of partnership agreements and strategic alliances. Enterprises such as Michelin and Pirelli have, as a result, set up production plants in Asia in order to profit from the low production costs and the expanding market.

Figure 3.4

Share of EUR15 number of employees, 1995



Source : DEBA GEIE

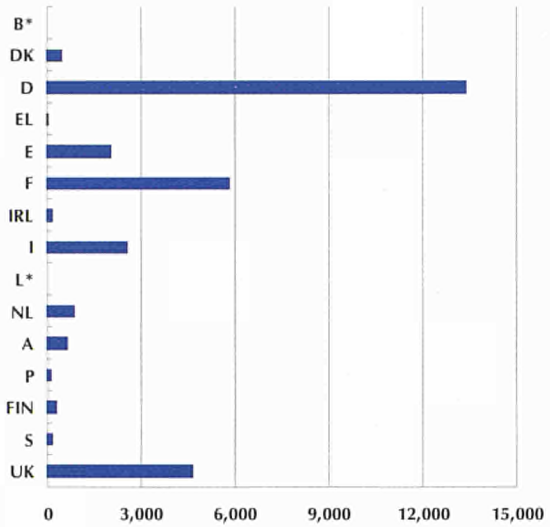
A few figures on the industry

In 1996, the rubber and plastics industries accounted for 3.7% of total manufacturing output in the EU, broken down into 0.9% for the rubber industry and 2.8% for the plastics sector. This figure ranged from 1.1% in Sweden to 4.5% in the United Kingdom. By way of comparison, it was 3.8% in the USA and 4.4% in Japan. That same year, the value of production totalled ECU 122 300 million in the EU, a 2.0% fall on 1995. This fall can, in fact, be attributed to the plastics industry where the value of production ebbed by 3.4% as against the 2.3% increase recorded by the rubber industry. The fall in output was particularly marked in Germany (-8.9%) and Austria (-8.6%). On the other hand, it rose by +5.2% in France and by +2.3% in the United Kingdom. The main Community producer is Germany (32.1% of EU production), well ahead of France (17.8%) and the United Kingdom (15.9%). The EU is the world's largest producer in the rubber and plastics industries, ahead of the USA, whose output in 1996 was 92.1% of the Community figure (90.3% for employment), and Japan on 84.1%

(50.9% of the Community's employment level). The other main producer countries are South Korea, Taiwan, Singapore and China.

In 1995, employment was up 1.7% on the previous year to 1.1 million workers throughout EUR15, with 73.1% working in the plastics sector and 26.9% in the rubber industry. Germany, the United Kingdom and France employed 32.4%, 20.2% and 16.8% respectively of the Community workforce in this sector.

Figure 3.5



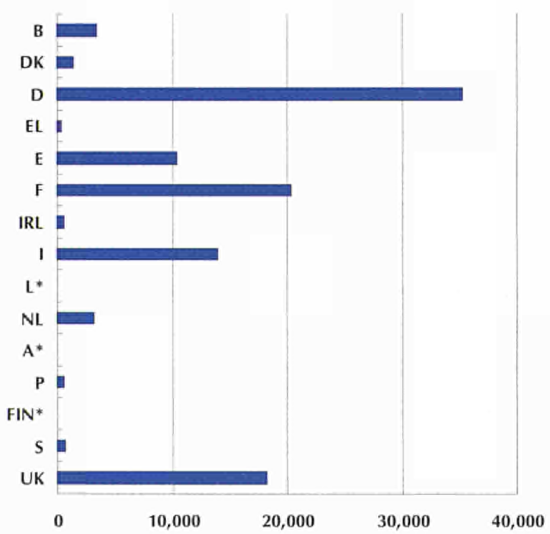
Labour costs, 1995 (million ECU)

Source: DEBA GEIE

Environment

The rubber industry's problems hinge on the burning and disposal of used tyres. In this respect, the increased lifespan of tyres and the application of retreading techniques make a positive contribution to environmental protection, even though the overall increase in the number of cars is a force pulling in the opposite direction. Whilst plastics do have the advantage of satisfying the needs of consumers, by dint of the qualities they offer, the use of them has been reduced in terms of both weight and volume and they are being replaced by cardboard, i.e. biodegradable, packaging. Supermarket shelves are now stacked with washing powders, softeners and cleaning agents in environment-friendly refill packs and mini-packs. Various systems have been set up in Europe for recycling plastic packaging or restricting its use. A large number of enterprises display a logo on their packaging to indicate either that they sponsor recyling enterprises or that the packaging in question can be recycled. Nevertheless, the national and Community regulations remain rather vague and consumers can be confused by all these symbols which make no clear distinction between recyclable and recycled packaging, and tend to be more of a marketing tool. The future of the plastics industry lies in stepping up its efforts in the field of recycling, if it wishes to avoid the threat of measures being introduced to limit the use of plastics and replace them with products which do not harm the environment.

Figure 3.6

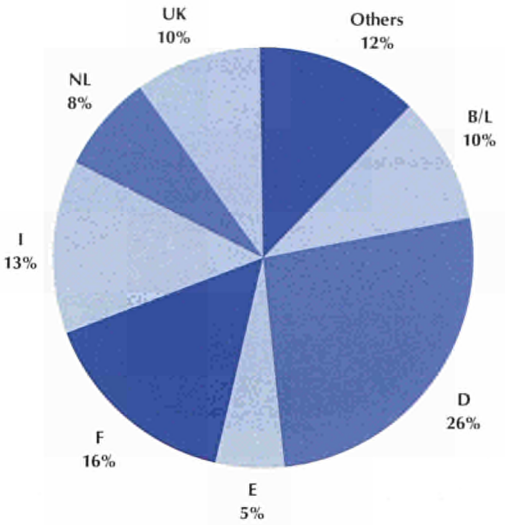


Production in constant prices, 1996 (million ECU)

Source: DEBA GEIE

Figure 3.7

Share of world exports, 1995



Source: eurostat

The future of the plastics industry is tied in with greater efforts in the field of recycling

External trade

Extra-Community imports in 1995 totalled ECU 9 600 million for EUR15, ECU 2.9 million of which went to Germany (+15.4% in one year) and ECU 1.7 million to the United Kingdom (+9.4%). Extra-Community exports totalled ECU 12 400 million for EUR15, with Germany contributing 32.9%, Italy 13.7% and France 13.6%. The EU has an excess of production capacity, as shown by the coverage rate of 130% in 1995. This rate was over 100% in Italy (190%), Germany (140%) and France (110%). The United Kingdom, on the other hand, had a balance of trade deficit (ECU 700 million in 1995). The EU's main export partners are the USA, ahead of Japan, Australia and Canada in the rubber sector, and eastern Europe - primarily the Czech Republic and Poland - for plastics. Rubber imports come from Japan, the USA, Malaysia and South Korea, whilst plastics are imported from the USA and eastern Asia (China, Japan and Taiwan).

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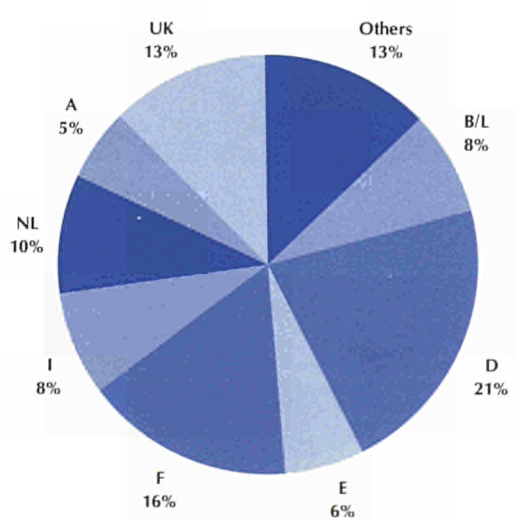
Figure 3.8

Share of world imports, 1995



Source: eurostat

RECENT DEVELOPMENTS

The EU rubber industry had, in 1995, production of 30.6 billion ECU and employed 0.3 million people. The value added of the branch amounted to 13.9 billion ECU. Average productivity per person was 42,900 ECU, with major differences between Member States (from 56,800 ECU for Italy to 20,600 ECU for Portugal). The industry is made up of two sectors with different structures, but for which the turnovers are approximately the same: the production of tyres is concentred in about 20 companies, while the industrial rubber sector has around 1,300 enterprises ranging in size from a few dozen employees to several thousand.

The European rubber industry is characterised by considerable creativity. The radial ply tyre was developed in Europe, as were hydroelastic engine mounts and offshore oil pipelines. Research and Development expenditure amounts, on average, to 3% to 4% of turnover, although 20% of enterprises in this sector spend 8%; this allows the EU to maintain a level of technological expertise comparable to the USA and Japan.

Under pressure from its major customers (the automobile, building and armaments industries), a quality assurance policy has gradually been introduced and a substantial amount of investment has been allocated to raising productivity by automating certain stages of the manufacturing process. The enormous efforts which have been made have led to a much more rigorous management approach to production, technology and logistics.

In order to protect the environnement and the safety of workers, the rubber industry not only complies with European directives (the Seveso directives, the regulations on CFCs etc.), but also anticipates them (stopping the dumping of tyres, nitrosamines etc.).

However, a certain number of problems have emerged, such as the relentless competition from countries with lower labour costs (particularly in south-east Asia and central and eastern Europe). As for bicycle tyres and latex-based products (condoms, thread, surgical and examination gloves), production has shifted dramatically towards the Asian countries. This competition is also found in the markets for conveyor belts, sheets, certain types of tubing and footwear.

Moreover, substantial increases in the prices of the main raw materials - extremely difficult to recover on the sale price - have caused profit margins to level off. These factors have led to a greater and greater penetration of goods from outside the Community and a fall in the cover ratio.

Table 3.1

Value-added at factor cost (million ECU)

	1992	t / t-1 (%)	1993	t / t-1 (%)	1994	t / t-1 (%)	1995	t / t-1 (%)	1996	t / t-1 (%)
EUR15	43,293.1	3.5	42,318.4	-2.3	45,904.2	8.5	49,666.1	8.2	48,929.0	-1.5
B	:	:	:	:	:	:	:	:	:	:
Share (%)	:		:		:		:		:	
DK	708.9	7.3	694.9	-2.0	765.8	10.2	860.0	12.3	832.8	-3.2
Share (%)	1.6		1.6		1.7		1.7		1.7	
D	15,257.9	2.4	15,408.3	1.0	16,468.1	6.9	17,819.8	8.2	16,372.0	-8.1
Share (%)	35.2		36.4		35.9		35.9		33.5	
EL	147.3	11.8	151.1	2.6	151.0	-0.1	143.7	-4.8	162.3	12.9
Share (%)	0.3		0.4		0.3		0.3		0.3	
E	3,244.5	2.5	2,770.2	-14.6	3,012.9	8.8	3,604.5	19.6	3,764.3	4.4
Share (%)	7.5		6.5		6.6		7.3		7.7	
F	7,029.5	5.5	7,076.3	0.7	7,609.8	7.5	8,142.5	7.0	8,625.2	5.9
Share (%)	16.2		16.7		16.6		16.4		17.6	
IRL	316.8	10.3	293.8	-7.3	323.3	10.0	367.9	13.8	374.6	1.8
Share (%)	0.7		0.7		0.7		0.7		0.8	
I	4,888.5	1.4	4,653.9	-4.8	5,112.4	9.9	5,222.6	2.2	5,353.8	2.5
Share (%)	11.3		11.0		11.1		10.5		10.9	
L	:	:	:	:	:	:	:	:	:	:
Share (%)	:		:		:		:		:	
NL	1,318.4	4.9	1,303.0	-1.2	1,375.8	5.6	1,499.5	9.0	1,427.3	-4.8
Share (%)	3.0		3.1		3.0		3.0		2.9	
A	:	:	:	:	:	:	:	:	:	:
Share (%)	:		:		:		:		:	
P	290.1	16.3	266.0	-8.3	299.1	12.4	343.9	15.0	337.5	-1.9
Share (%)	0.7		0.6		0.7		0.7		0.7	
FIN	:	:	:	:	:	:	593.5	:	557.8	-6.0
Share (%)	:		:		:		1.2		1.1	
S	300.9	-10.2	246.2	-18.2	318.0	29.2	311.5	-2.0	354.1	13.7
Share (%)	0.7		0.6		0.7		0.6		0.7	
UK	7,021.8	4.4	6,795.7	-3.2	7,631.2	12.3	7,969.0	4.4	8,150.6	2.3
Share (%)	16.2		16.1		16.6		16.0		16.7	

Source: DEBA GEIE

Table 3.2

Production in constant prices (million ECU)

	1992	t / t-1 (%)	1993	t / t-1 (%)	1994	t / t-1 (%)	1995	t / t-1 (%)	1996	t / t-1 (%)
EUR15	109,068.1	2.5	106,347.3	-2.5	115,956.4	9.0	124,779.7	7.6	122,287.0	-2.0
B	3,557.7	8.7	3,268.7	-8.1	3,318.6	1.5	4,097.3	23.5	3,838.8	-6.3
Share (%)	3.3		3.1		2.9		3.3		3.1	
DK	1,519.1	2.0	1,480.6	-2.5	1,631.1	10.2	1,814.6	11.3	1,753.8	-3.4
Share (%)	1.4		1.4		1.4		1.5		1.4	
D	37,577.7	3.3	37,330.5	-0.7	39,810.2	6.6	43,055.3	8.2	39,219.3	-8.9
Share (%)	34.5		35.1		34.3		34.5		32.1	
EL	546.5	0.7	522.7	-4.4	575.0	10.0	532.5	-7.4	597.5	12.2
Share (%)	0.5		0.5		0.5		0.4		0.5	
E	8,309.7	0.6	7,001.6	-15.7	7,947.7	13.5	9,441.4	18.8	9,803.5	3.8
Share (%)	7.6		6.6		6.9		7.6		8.0	
F	18,256.7	4.8	18,029.7	-1.2	19,695.8	9.2	20,710.9	5.2	21,795.0	5.2
Share (%)	16.7		17.0		17.0		16.6		17.8	
IRL	711.8	3.9	690.4	-3.0	751.5	8.8	860.7	14.5	877.5	2.0
Share (%)	0.7		0.6		0.6		0.7		0.7	
I	14,008.3	1.6	13,366.3	-4.6	14,682.5	9.8	14,823.5	1.0	14,971.5	1.0
Share (%)	12.8		12.6		12.7		11.9		12.2	
L	:	:	:	:	:	:	:	:	:	:
Share (%)	:		:		:		:		:	
NL	3,607.2	1.6	3,538.9	-1.9	3,771.8	6.6	4,034.9	7.0	3,833.1	-5.0
Share (%)	3.3		3.3		3.3		3.2		3.1	
A	2,051.0	7.7	2,074.1	1.1	2,185.7	5.4	2,589.9	18.5	2,367.0	-8.6
Share (%)	1.9		2.0		1.9		2.1		1.9	
P	817.4	14.4	747.5	-8.6	812.3	8.7	919.0	13.1	899.4	-2.1
Share (%)	0.7		0.7		0.7		0.7		0.7	
FIN	:	:	:	:	:	:	1,369.8	:	1,286.4	-6.1
Share (%)	:		:		:		1.1		1.1	
S	607.0	-21.4	552.2	-9.0	691.7	25.3	698.9	1.0	794.0	13.6
Share (%)	0.6		0.5		0.6		0.6		0.6	
UK	15,801.8	-0.1	16,120.9	2.0	18,166.3	12.7	18,983.7	4.5	19,427.9	2.3
Share (%)	14.5		15.2		15.7		15.2		15.9	

Source: DEBA GEIE

NUMBER OF EMPLOYEES & LABOUR COSTS

Table 3.3

Number of employees (units)

	1991	t / t-1 (%)	1992	t / t-1 (%)	1993	t / t-1 (%)	1994	t / t-1 (%)	1995	t / t-1 (%)
EUR15	1,180,374.0	0.4	1,155,300.0	-2.1	1,108,172.0	-4.1	1,101,315.0	-0.6	1,113,142.0	1.1
B	25,078.0	5.2	25,168.0	0.4	23,178.0	-7.9	22,708.0	-2.0	24,628.0	8.5
Share (%)	2.1		2.2		2.1		2.1		2.2	
DK	14,315.0	-2.1	14,389.0	0.5	14,242.0	-1.0	14,784.0	3.8	14,746.0	-0.3
Share (%)	1.2		1.2		1.3		1.3		1.3	
D	404,922.0	2.9	393,216.0	-2.9	369,240.0	-6.1	355,195.0	-3.8	360,865.0	1.6
Share (%)	34.3		34.0		33.3		32.3		32.4	
EL	7,861.0	-7.1	7,757.0	-1.3	7,601.0	-2.0	8,240.0	8.4	7,193.0	-12.7
Share (%)	0.7		0.7		0.7		0.7		0.6	
E	108,625.0	0.4	100,376.0	-7.6	88,786.0	-11.5	94,275.0	6.2	92,133.0	-2.3
Share (%)	9.2		8.7		8.0		8.6		8.3	
F	185,964.0	4.9	184,963.0	-0.5	182,097.0	-1.5	182,473.0	0.2	186,922.0	2.4
Share (%)	15.8		16.0		16.4		16.6		16.8	
IRL	7,994.0	4.0	8,327.0	4.2	8,423.0	1.2	8,621.0	2.4	9,192.0	6.6
Share (%)	0.7		0.7		0.8		0.8		0.8	
I	112,120.0	-1.2	111,282.0	-0.7	111,738.0	0.4	105,858.0	-5.3	100,690.0	-4.9
Share (%)	9.5		9.6		10.1		9.6		9.0	
L	:	:	:	:	:	:	:	:	:	:
Share (%)	:		:		:		:		:	
NL	31,095.0	3.1	31,232.0	0.4	30,608.0	-2.0	29,652.0	-3.1	29,494.0	-0.5
Share (%)	2.6		2.7		2.8		2.7		2.6	
A	19,113.0	:	19,681.0	3.0	19,248.0	-2.2	19,656.0	2.1	20,287.0	3.2
Share (%)	1.6		1.7		1.7		1.8		1.8	
P	21,585.0	-6.2	22,638.0	4.9	19,784.0	-12.6	19,157.0	-3.2	17,996.0	-6.1
Share (%)	1.8		2.0		1.8		1.7		1.6	
FIN	:	:	:	:	:	:	:	:	11,518.0	:
Share (%)	:		:		:		:		1.0	
S	9,884.0	-26.4	7,975.0	-19.3	7,134.0	-10.5	7,922.0	11.0	7,969.0	0.6
Share (%)	0.8		0.7		0.6		0.7		0.7	
UK	213,570.0	-5.0	212,411.0	-0.5	211,218.0	-0.6	217,405.0	2.9	224,676.0	3.3
Share (%)	18.1		18.4		19.1		19.7		20.2	

Source : DEBA GEIE

Table 3.4

Labour costs (million ECU)

	1991	t / t-1 (%)	1992	t / t-1 (%)	1993	t / t-1 (%)	1994	t / t-1 (%)	1995	t / t-1 (%)
EUR15	29,573.3	6.3	30,817.0	4.2	30,723.4	-0.3	31,446.5	2.4	33,038.1	5.1
B	:	:	:	:	:	:	:	:	:	:
Share (%)	:		:		:		:		:	
DK	417.4	1.4	440.9	5.6	444.2	0.7	477.3	7.5	511.6	7.2
Share (%)	1.4		1.4		1.4		1.5		1.5	
D	11,157.3	7.0	11,851.8	6.2	12,359.0	4.3	12,396.8	0.3	13,448.1	8.5
Share (%)	37.7		38.5		40.2		39.4		40.7	
EL	99.4	-2.2	101.2	1.8	107.8	6.5	113.1	4.9	106.3	-6.0
Share (%)	0.3		0.3		0.4		0.4		0.3	
E	2,312.5	5.4	2,369.7	2.5	1,978.9	-16.5	2,011.9	1.7	2,096.3	4.2
Share (%)	7.8		7.7		6.4		6.4		6.3	
F	4,809.3	9.7	5,074.0	5.5	5,330.7	5.1	5,492.2	3.0	5,864.0	6.8
Share (%)	16.3		16.5		17.4		17.5		17.7	
IRL	158.4	7.3	173.6	9.6	172.5	-0.6	184.3	6.8	201.3	9.2
Share (%)	0.5		0.6		0.6		0.6		0.6	
I	3,307.1	5.9	3,356.1	1.5	2,989.6	-10.9	2,907.7	-2.7	2,603.7	-10.5
Share (%)	11.2		10.9		9.7		9.2		7.9	
L	:	:	:	:	:	:	:	:	:	:
Share (%)	:		:		:		:		:	
NL	792.8	8.1	853.5	7.7	892.2	4.5	899.8	0.9	931.7	3.5
Share (%)	2.7		2.8		2.9		2.9		2.8	
A	495.0	:	555.0	12.1	583.3	5.1	621.0	6.5	682.2	9.9
Share (%)	1.7		1.8		1.9		2.0		2.1	
P	169.6	7.7	211.0	24.4	181.9	-13.8	178.3	-2.0	178.3	0.0
Share (%)	0.6		0.7		0.6		0.6		0.5	
FIN	:	:	:	:	:	:	:	:	331.3	:
Share (%)	:		:		:		:		1.0	
S	276.9	-20.0	240.4	-13.2	177.1	-26.3	207.0	16.9	210.1	1.5
Share (%)	0.9		0.8		0.6		0.7		0.6	
UK	4,310.3	4.2	4,346.7	0.8	4,292.6	-1.2	4,652.0	8.4	4,702.8	1.1
Share (%)	14.6		14.1		14.0		14.8		14.2	

Source : DEBA GEIE

Table 3.5

Extra-EUR15 exports (million ECU)

	1991	t / t-1 (%)	1992	t / t-1 (%)	1993	t / t-1 (%)	1994	t / t-1 (%)	1995	t / t-1 (%)
EUR15	8,268.9	1.5	8,599.2	4.0	9,729.3	13.1	10,936.6	12.4	12,409.7	13.5
B/L	281.1	-9.2	288.6	2.7	332.5	15.2	402.1	20.9	487.8	21.3
Share (%)	3.4		3.4		3.4		3.7		3.9	
DK	202.3	-0.4	213.9	5.7	225.1	5.2	244.7	8.7	276.4	12.9
Share (%)	2.4		2.5		2.3		2.2		2.2	
D	2,672.0	6.0	2,845.6	6.5	3,101.9	9.0	3,607.0	16.3	4,070.6	12.9
Share (%)	32.3		33.1		31.9		33.0		32.8	
EL	15.8	7.3	26.6	68.4	47.6	79.0	61.3	28.9	67.8	10.6
Share (%)	0.2		0.3		0.5		0.6		0.5	
E	304.2	-36.4	241.6	-20.6	411.0	70.1	499.9	21.6	591.6	18.3
Share (%)	3.7		2.8		4.2		4.6		4.8	
F	1,089.9	3.9	1,121.7	2.9	1,207.3	7.6	1,290.1	6.9	1,683.4	30.5
Share (%)	13.2		13.0		12.4		11.8		13.6	
IRL	39.0	12.5	36.3	-7.0	45.6	25.8	52.0	13.9	58.4	12.3
Share (%)	0.5		0.4		0.5		0.5		0.5	
I	1,075.9	3.7	1,143.6	6.3	1,290.3	12.8	1,473.7	14.2	1,699.5	15.3
Share (%)	13.0		13.3		13.3		13.5		13.7	
NL	424.4	7.0	482.0	13.6	608.4	26.2	663.0	9.0	696.0	5.0
Share (%)	5.1		5.6		6.3		6.1		5.6	
A	454.3	10.6	498.5	9.7	546.8	9.7	618.5	13.1	572.9	-7.4
Share (%)	5.5		5.8		5.6		5.7		4.6	
P	35.4	3.7	36.6	3.5	32.7	-10.7	33.4	2.0	47.1	41.4
Share (%)	0.4		0.4		0.3		0.3		0.4	
FIN	180.6	-25.3	157.6	-12.7	214.0	35.8	252.1	17.8	226.5	-10.1
Share (%)	2.2		1.8		2.2		2.3		1.8	
S	488.6	8.6	474.9	-2.8	519.8	9.5	535.2	3.0	615.8	15.1
Share (%)	5.9		5.5		5.3		4.9		5.0	
UK	1,005.4	4.3	1,031.7	2.6	1,146.3	11.1	1,203.8	5.0	1,315.9	9.3
Share (%)	12.2		12.0		11.8		11.0		10.6	

Source: eurostat

Table 3.6

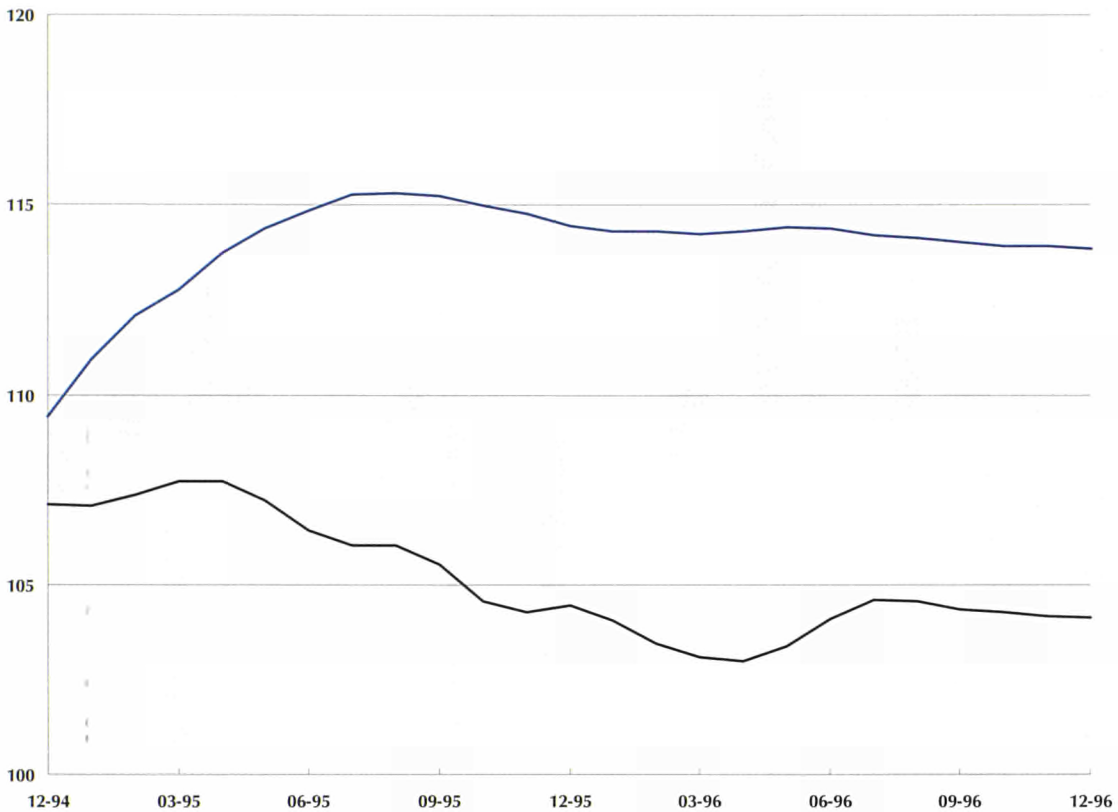
Extra-EUR15 imports (million ECU)

	1991	t / t-1 (%)	1992	t / t-1 (%)	1993	t / t-1 (%)	1994	t / t-1 (%)	1995	t / t-1 (%)
EUR15	6,574.3	11.4	7,190.6	9.4	7,468.0	3.9	8,451.6	13.2	9,629.1	13.9
B/L	435.3	13.0	473.5	8.8	465.0	-1.8	492.2	5.8	589.1	19.7
Share (%)	6.6		6.6		6.2		5.8		6.1	
DK	141.8	5.0	141.1	-0.5	149.4	5.9	166.7	11.6	200.7	20.4
Share (%)	2.2		2.0		2.0		2.0		2.1	
D	1,944.5	21.0	2,178.7	12.0	2,275.4	4.4	2,510.5	10.3	2,895.3	15.3
Share (%)	29.6		30.3		30.5		29.7		30.1	
EL	82.3	21.2	90.0	9.4	96.8	7.5	99.6	2.9	113.3	13.7
Share (%)	1.3		1.3		1.3		1.2		1.2	
E	201.1	25.7	244.4	21.5	210.5	-13.9	251.3	19.4	338.9	34.8
Share (%)	3.1		3.4		2.8		3.0		3.5	
F	753.5	10.8	794.7	5.5	859.8	8.2	958.6	11.5	1,056.7	10.2
Share (%)	11.5		11.1		11.5		11.3		11.0	
IRL	66.7	23.6	92.0	37.9	107.5	16.8	105.6	-1.7	114.6	8.5
Share (%)	1.0		1.3		1.4		1.2		1.2	
I	583.5	10.3	675.7	15.8	637.2	-5.7	732.8	15.0	866.0	18.2
Share (%)	8.9		9.4		8.5		8.7		9.0	
NL	562.6	21.0	627.6	11.5	623.3	-0.7	735.7	18.0	909.1	23.6
Share (%)	8.6		8.7		8.3		8.7		9.4	
A	216.8	11.6	242.5	11.9	280.3	15.6	308.3	10.0	278.8	-9.6
Share (%)	3.3		3.4		3.8		3.6		2.9	
P	36.1	33.1	41.4	14.7	53.3	28.7	63.8	19.7	85.9	34.6
Share (%)	0.5		0.6		0.7		0.8		0.9	
FIN	96.1	-21.4	88.8	-7.6	85.8	-3.4	108.2	26.1	93.9	-13.3
Share (%)	1.5		1.2		1.1		1.3		1.0	
S	350.7	-7.4	310.7	-11.4	287.1	-7.6	321.3	11.9	340.6	6.0
Share (%)	5.3		4.3		3.8		3.8		3.5	
UK	1,103.2	0.6	1,189.4	7.8	1,336.7	12.4	1,596.8	19.5	1,746.3	9.4
Share (%)	16.8		16.5		17.9		18.9		18.1	

Source: eurostat

PRODUCTION & PRODUCER PRICE INDICES

Figure 3.9



EUR15 production and producer price indices (1990 = 100)

Source: eurostat

Table 3.7

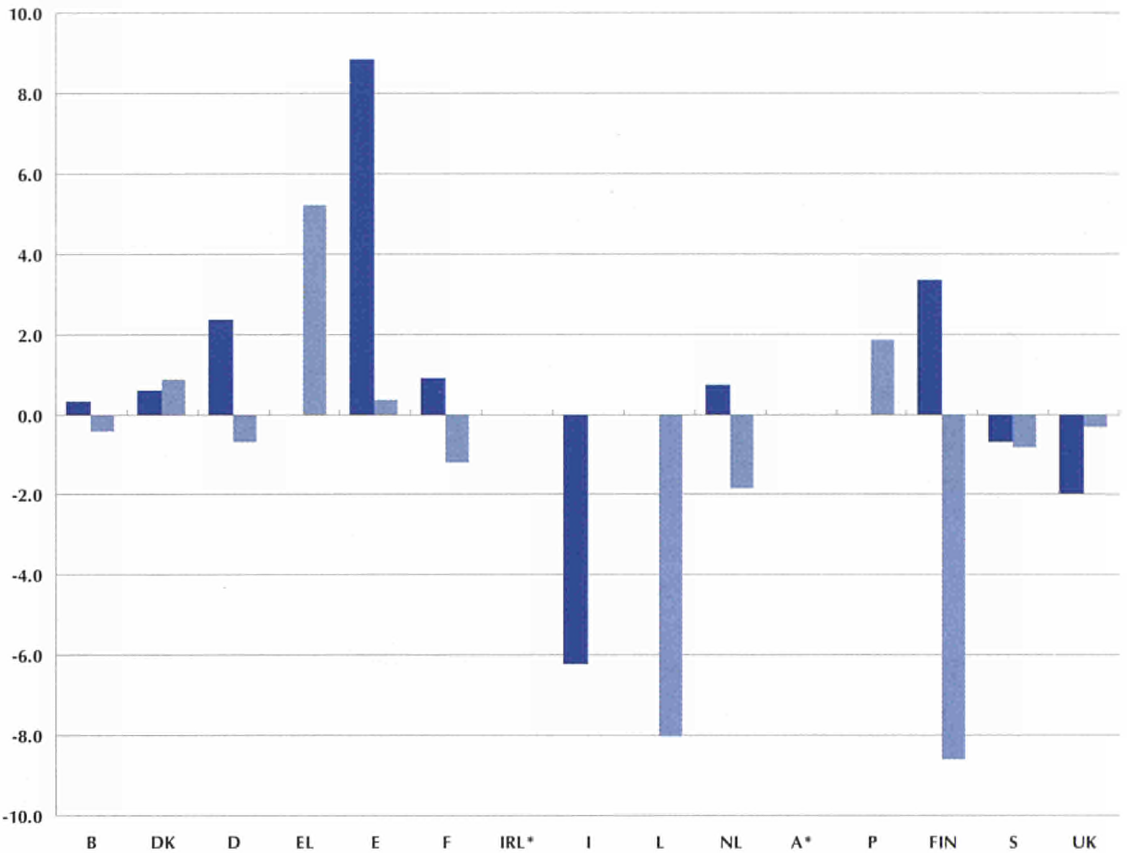
	Latest 3 months available			Production index t / t-1	Production index t / t-4	Latest month available	Producer price index t / t-3	Producer price index t / t-12
EUR15	10-96	⇨	12-96	-0.3	0.2	12-96	-0.2	-0.5
B	10-96	⇨	12-96	0.0	0.3	12-96	0.0	-0.4
DK	10-96	⇨	12-96	-1.1	0.6	12-96	-1.3	0.9
D	10-96	⇨	12-96	1.1	2.4	12-96	-0.2	-0.7
EL	09-96	⇨	11-96	-4.8	3.0	12-96	1.0	5.2
E	10-96	⇨	12-96	1.9	8.8	01-97	0.8	0.4
F	10-96	⇨	12-96	-2.1	0.9	01-97	-0.4	-1.1
IRL	10-92	⇨	12-92	0.3	2.7	02-95	7.2	14.5
I	10-96	⇨	12-96	-1.4	-6.2	12-96	-0.2	0.0
L	09-96	⇨	11-96	-1.2	-1.4	12-96	-2.1	-8.0
NL	10-96	⇨	12-96	0.3	0.7	12-96	0.0	-1.9
A	10-95	⇨	12-95	0.8	2.2		:	:
P	09-96	⇨	11-96	2.0	13.8	12-96	-0.5	1.8
FIN	10-96	⇨	12-96	1.4	3.4	01-97	-0.9	-8.5
S	10-96	⇨	12-96	-2.1	-0.7	01-97	0.6	1.9
UK	10-96	⇨	12-96	-0.7	-2.0	01-97	0.2	-0.2
Japan		⇨		:	:		:	:
USA		⇨		:	:		:	:

Latest growth rates for production and producer price indices (%)

Source: eurostat

Figure 3.10

Annual growth rates for production and producer price indices, based on changes from the corresponding three months of the previous year, Oct-96 to Dec-96 (%)

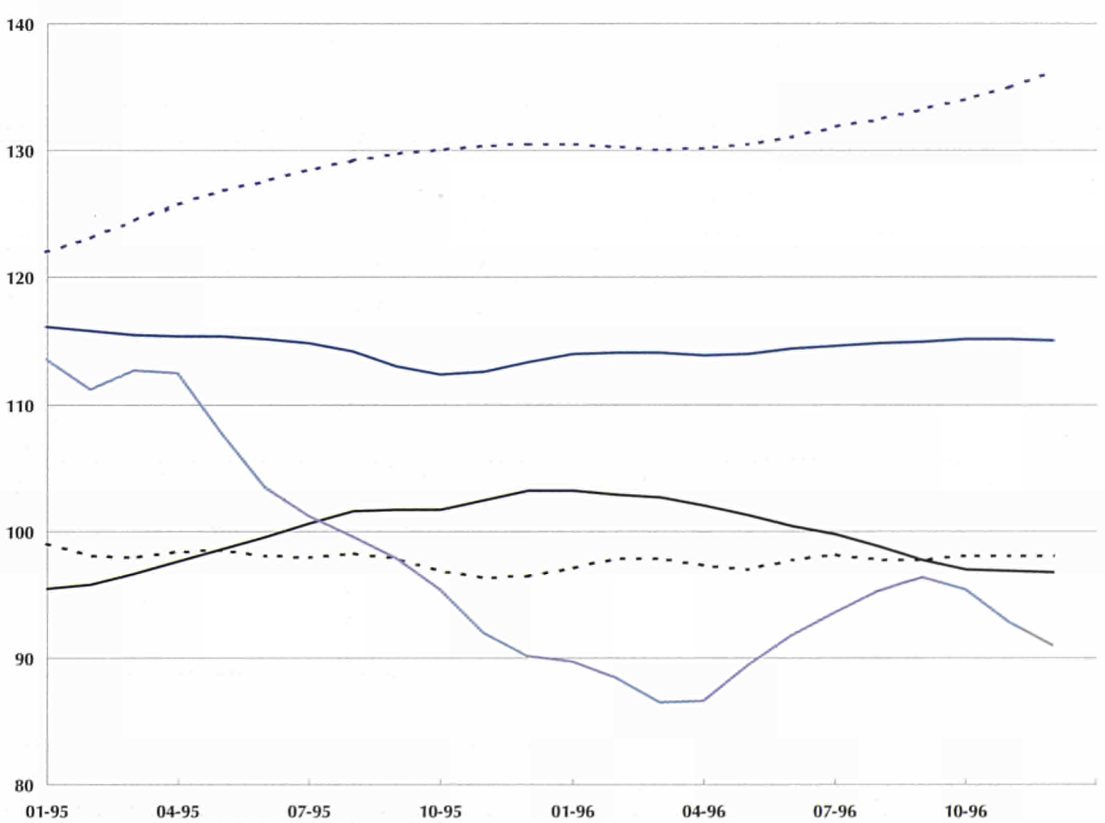


Production
Producer price index

Source: eurostat

Figure 3.11

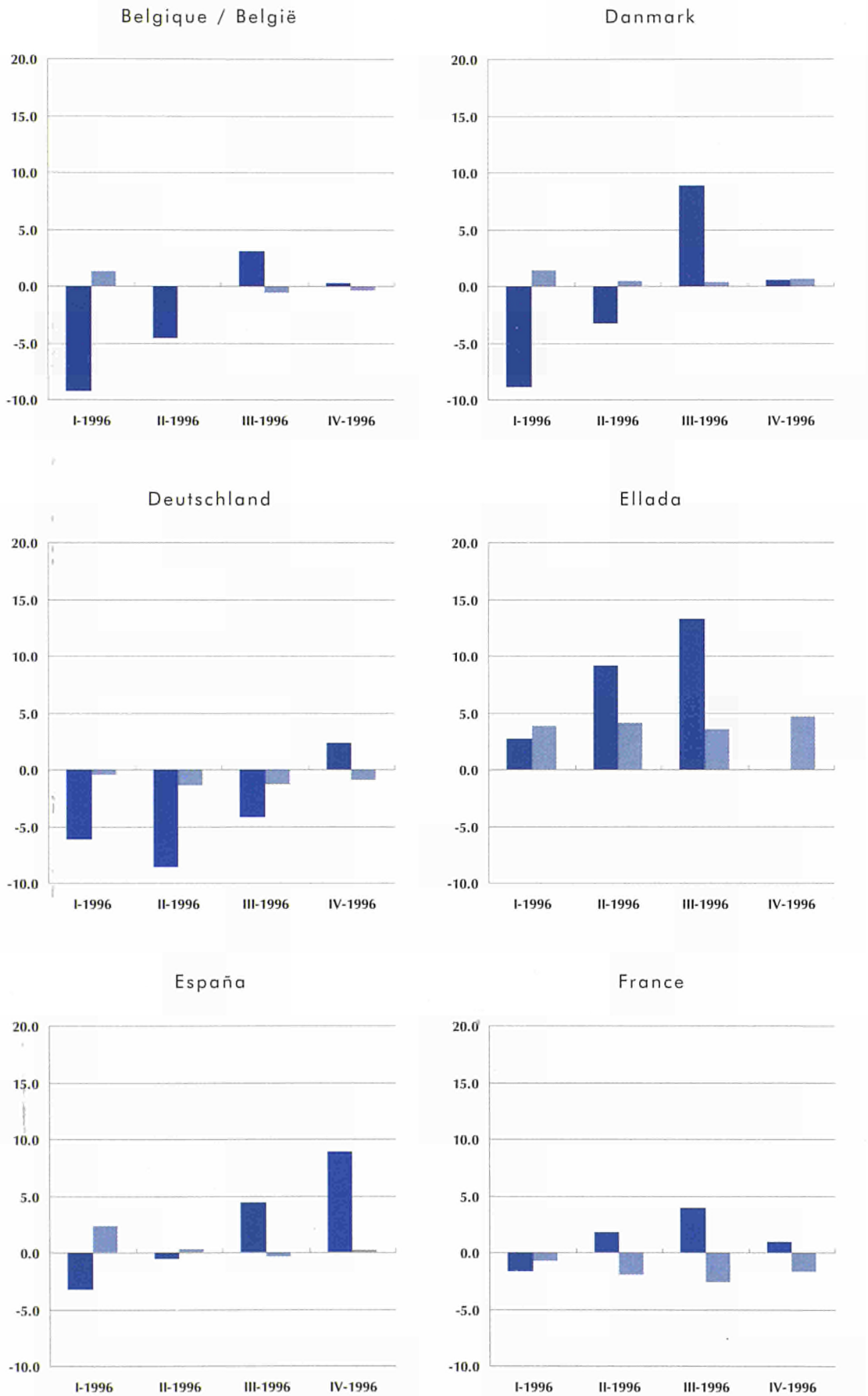
Production index for individual activities, trend cycle (1990 = 100)



Rubber tyres & tubes
Other rubber products
plastic plates, sheets, tubes & profiles
Plastic packing goods
Builders' ware of plastics

Source: eurostat

Figure 3.12



Annual growth rates for production and producer price indices, based on changes from the corresponding quarter of the previous year (%)

Source: eurostat

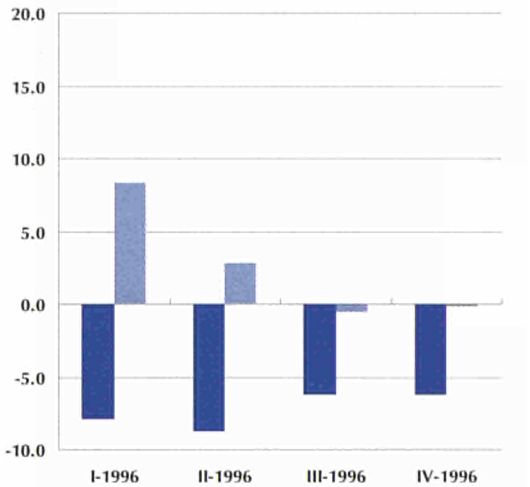
Figure 3.12

Annual growth rates for production and producer price indices, based on changes from the corresponding quarter of the previous year (%)

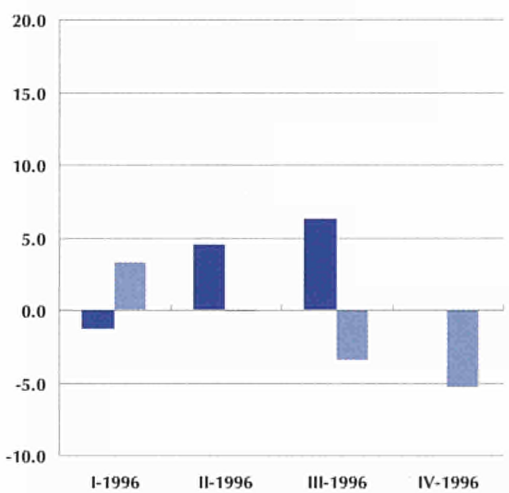
Ireland

Not available

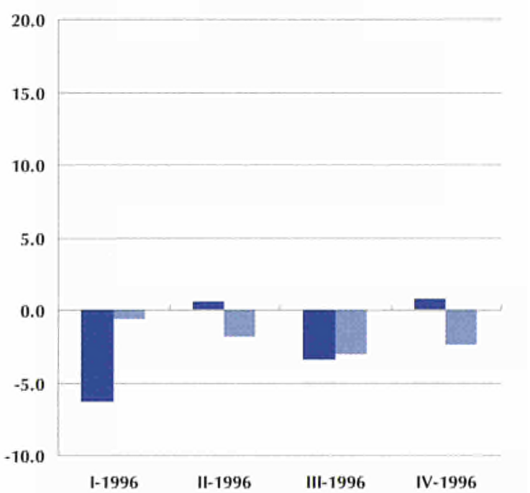
Italia



Luxembourg



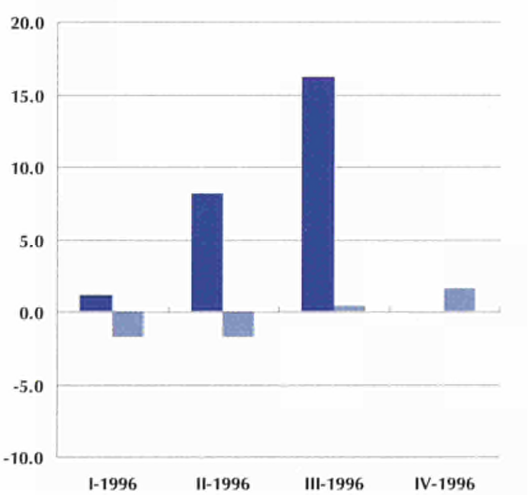
Nederland



Österreich

Not available

Portugal



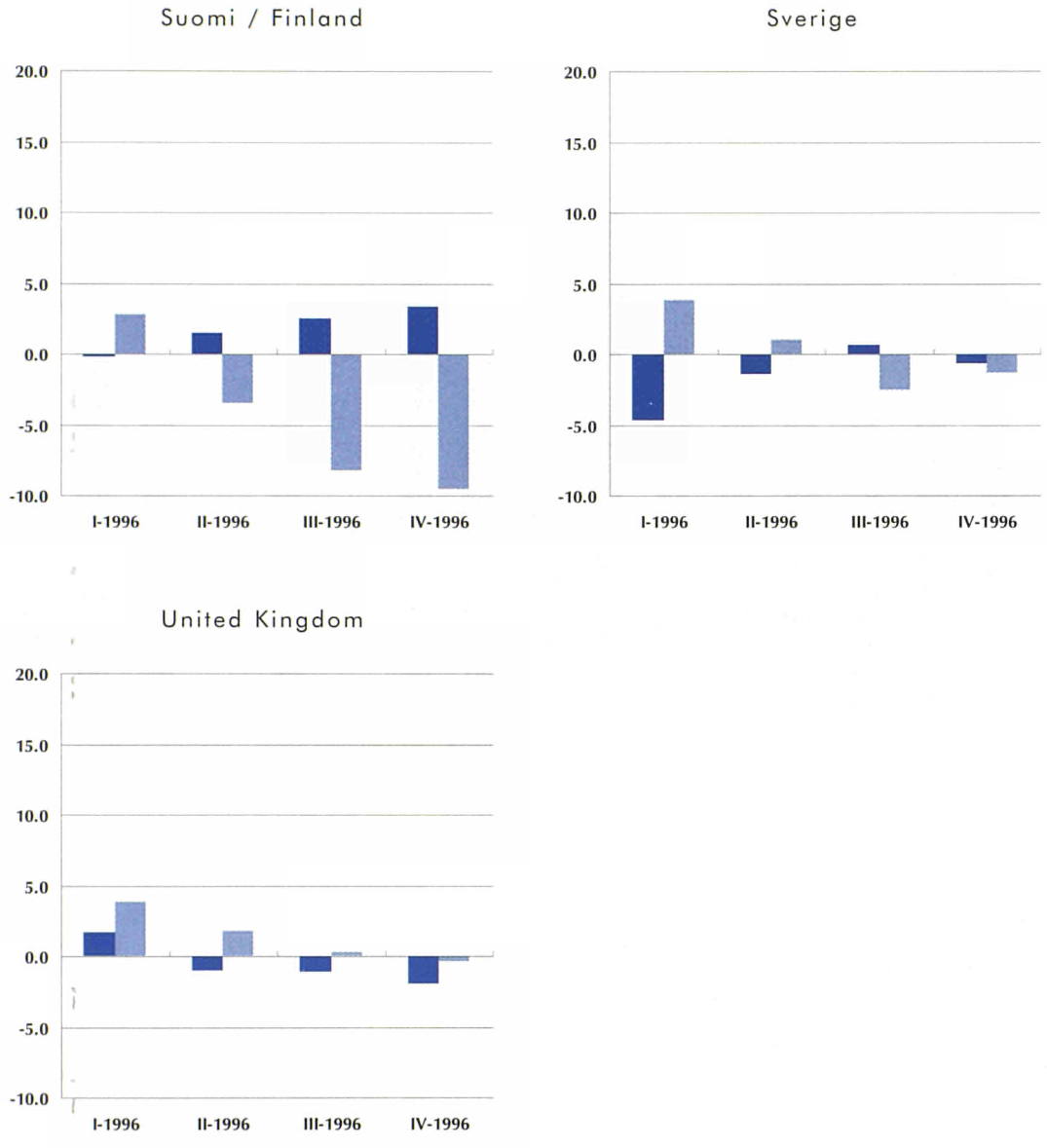
Production index

Producer price index

Source: eurostat

eurostat

Figure 3.12



Annual growth rates for production and producer price indices, based on changes from the corresponding quarter of the previous year (%)

Production index

Producer price index

Further information - the production and producer price indices:

The indices of production are adjusted in two stages. Firstly, account is taken of the variation in the number of working days in the month. The national Statistical Offices provide Eurostat with these series (except Denmark, France, Spain and the United Kingdom). Secondly, for EUR15 and most of the Member States a correction is made using seasonal adjustment with TRAMO / SEATS, a method developed by Professor Maravall and V.Gomez. For France, Ireland, Finland, Sweden and the United Kingdom, the indices are adjusted by the national statistical offices themselves. All data from Ireland is converted to NACE Rev.1 from the old classification NACE 1970 and is therefore less reliable.

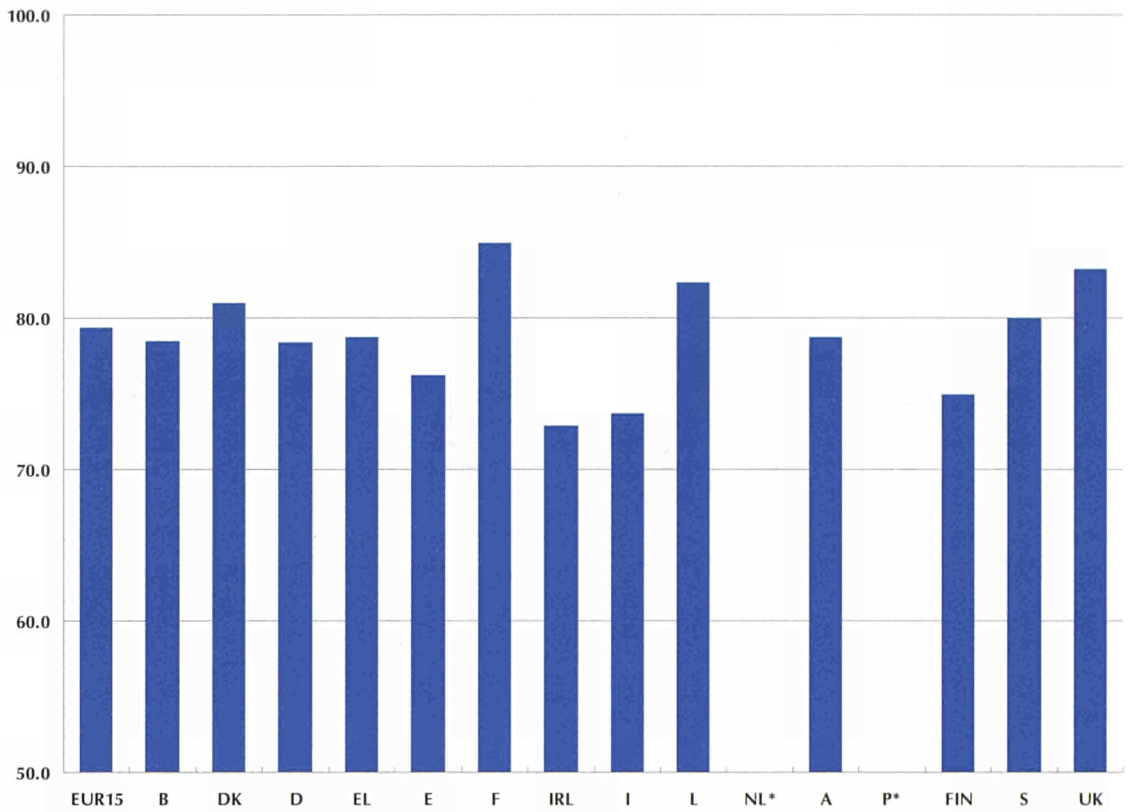
The index of producer prices shows (in the national currency of the Member State in question) changes in the ex-works selling prices of all products sold on the domestic market. Since we deal with producer prices, imports are not included in these price indices. Producer price indices are not seasonally adjusted.

Full methodological notes may be found on page 71.

Source: eurostat

Figure 3.13

Capacity utilisation rates, last quarter 1996 (%)



Source: DG II, Business Survey

Table 3.8

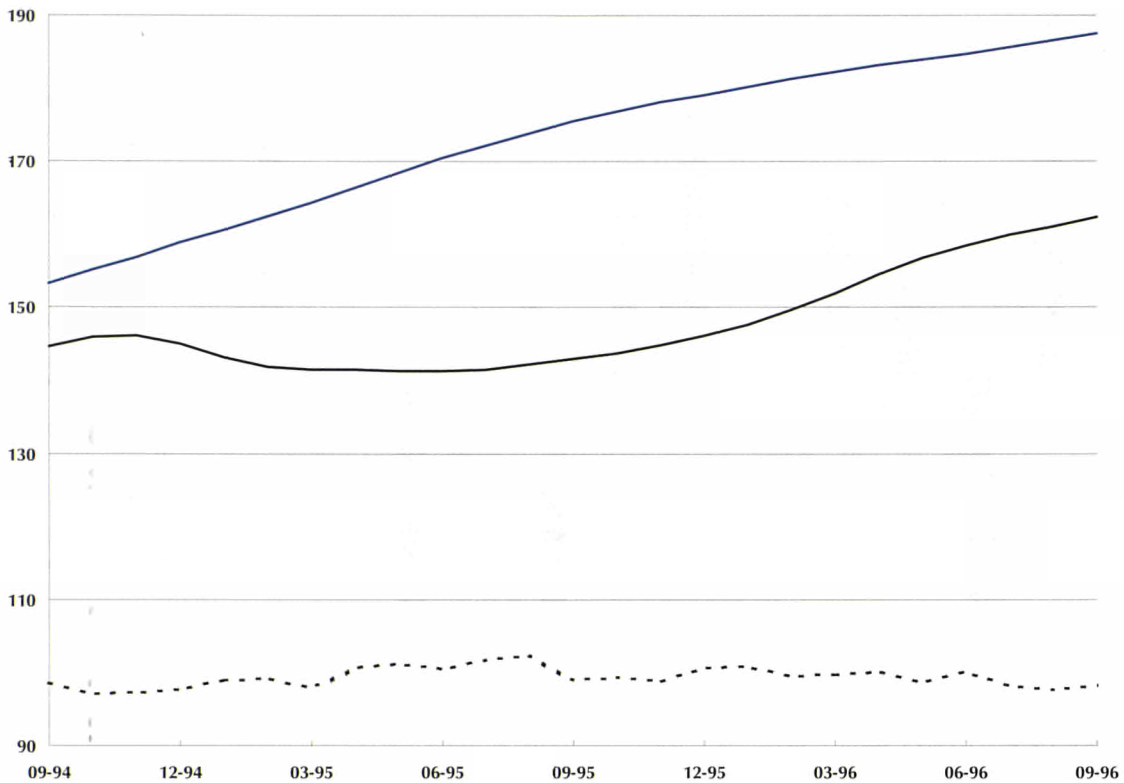
Capacity utilisation rates (%)

	Annual growth rate: latest quarter, t / t-4	I-1996	II-1996	III-1996	IV-1996
EUR15	-3.4	81.6	79.9	82.0	79.4
B	0.1	72.4	77.4	81.5	78.5
DK	2.5	80.0	78.0	81.0	81.0
D	-2.2	78.9	76.0	78.6	78.4
EL	0.0	72.8	74.8	73.0	78.7
E	-4.8	83.3	80.3	84.5	76.2
F	1.4	85.3	86.1	85.4	85.0
IRL	-4.7	74.5	65.3	74.3	72.9
I	-7.6	81.0	80.3	81.8	73.7
L	-12.6	94.6	95.0	88.7	82.3
NL	:	:	:	:	:
A	:	76.7	76.4	79.0	78.7
P	:	:	:	:	:
FIN	-4.2	76.6	77.9	74.0	75.0
S	:	:	73.0	79.0	80.0
UK	-5.0	86.0	83.0	85.6	83.2

Source: DG II, Business Survey

FOREIGN TRADE INDICES - TREND CYCLE

Figure 3.14



EUR15 foreign trade indices, trend cycle, in ECU terms (1990 = 100)

Source: eurostat

Table 3.9

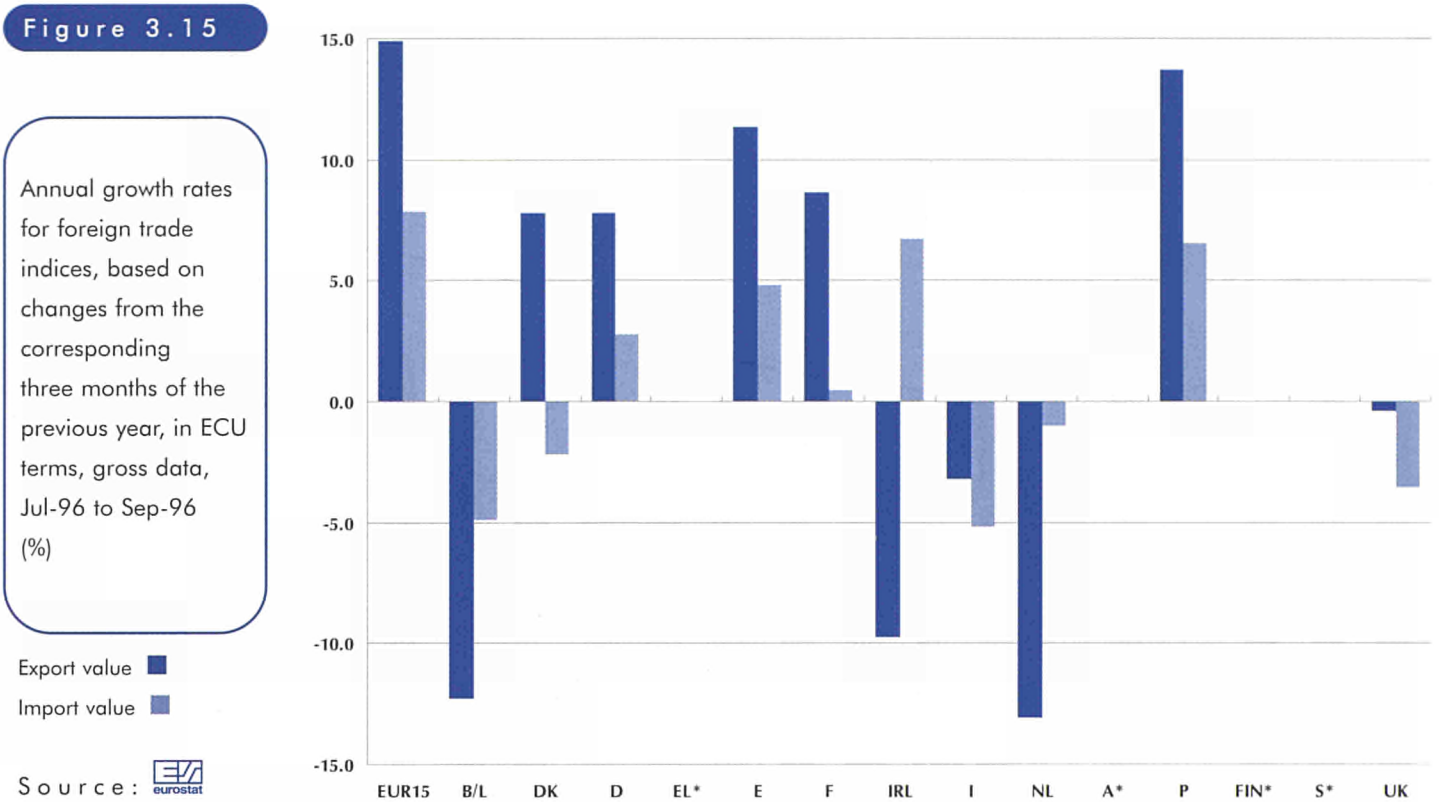
	Latest 3 months available			Exports Value	Exports Volume	Imports Value	Imports Volume	Terms of trade
EUR15	07-96	⇨	09-96	2.9	1.7	1.5	2.1	-1.6
B / L	07-96	⇨	09-96	-5.2	-7.9	-2.0	-3.1	1.4
DK	07-96	⇨	09-96	1.6	-0.1	-1.3	1.5	4.3
D	07-96	⇨	09-96	2.1	-0.2	3.4	2.0	-0.8
EL	07-96	⇨	09-96	:	1.4	2.9	-0.7	-1.4
E	07-96	⇨	09-96	4.7	5.0	3.7	-0.2	-2.0
F	07-96	⇨	09-96	1.4	3.2	-0.7	-2.0	-4.4
IRL	07-96	⇨	09-96	-3.3	-5.5	-1.4	0.4	4.3
I	07-96	⇨	09-96	-0.1	1.2	-3.1	-1.1	5.3
NL	07-96	⇨	09-96	-7.6	-7.3	4.7	-3.8	-3.3
A		⇨		:	:	:	:	:
P	07-96	⇨	09-96	5.0	3.0	2.6	1.1	1.6
FIN		⇨		:	:	:	:	:
S		⇨		:	:	:	:	:
UK	07-96	⇨	09-96	-1.7	-0.1	0.1	-1.6	-0.8

Three month on three month growth rates for foreign trade indices, trend cycle, value indices are in ECU terms (%)

Source: eurostat

Figure 3.15

Annual growth rates for foreign trade indices, based on changes from the corresponding three months of the previous year, in ECU terms, gross data, Jul-96 to Sep-96 (%)



Source: eurostat

Table 3.10

Annual growth rates for foreign trade indices, based on changes from the corresponding three months of the previous year, value indices are in ECU terms, gross data (%)

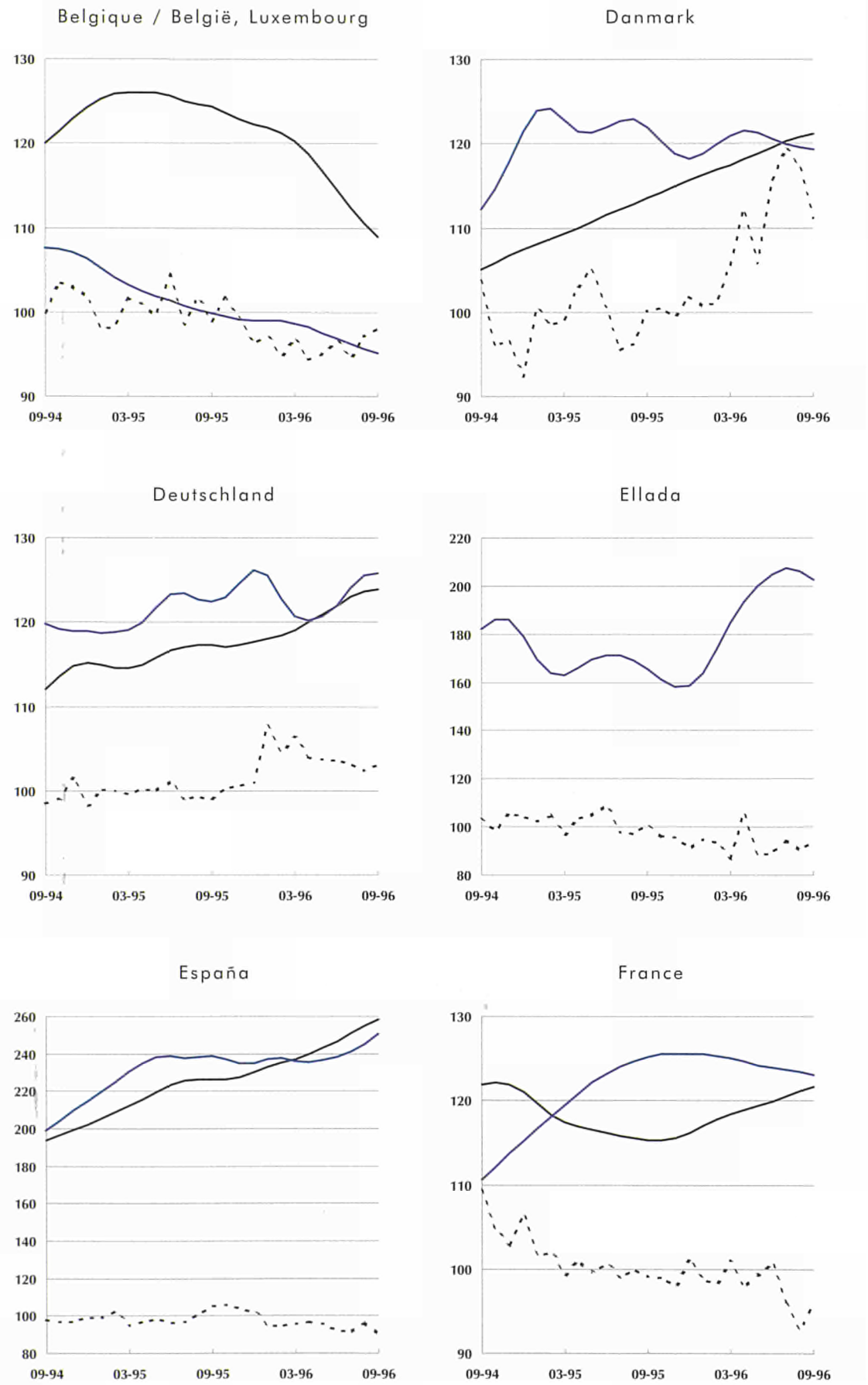
	Latest 3 months available			Exports Value	Exports Volume	Imports Value	Imports Volume	Terms of trade
EUR15	07-96	⇨	09-96	14.9	12.1	7.8	2.2	-2.9
B / L	07-96	⇨	09-96	-12.3	-13.6	-4.9	-9.2	-3.1
DK	07-96	⇨	09-96	7.8	-4.6	-2.2	2.6	19.2
D	07-96	⇨	09-96	7.8	1.9	2.8	1.0	3.9
EL	07-96	⇨	09-96	:	:	:	:	:
E	07-96	⇨	09-96	11.3	17.9	4.8	1.7	-8.1
F	07-96	⇨	09-96	8.6	7.9	0.4	-4.4	-4.5
IRL	07-96	⇨	09-96	-9.7	-16.8	6.7	4.5	7.0
I	07-96	⇨	09-96	-3.2	9.0	-5.2	-0.4	-6.7
NL	07-96	⇨	09-96	-13.1	-12.9	-1.0	-5.0	-4.0
A		⇨		:	:	:	:	:
P	07-96	⇨	09-96	13.7	15.0	6.5	4.3	-3.9
FIN		⇨		:	:	:	:	:
S		⇨		:	:	:	:	:
UK	07-96	⇨	09-96	-0.4	1.5	-3.5	-7.1	-5.6

Source: eurostat

FOREIGN TRADE INDICES - TREND CYCLE

Figure 3.16

Foreign trade indices in ECU terms, trend cycle (1990 = 100)

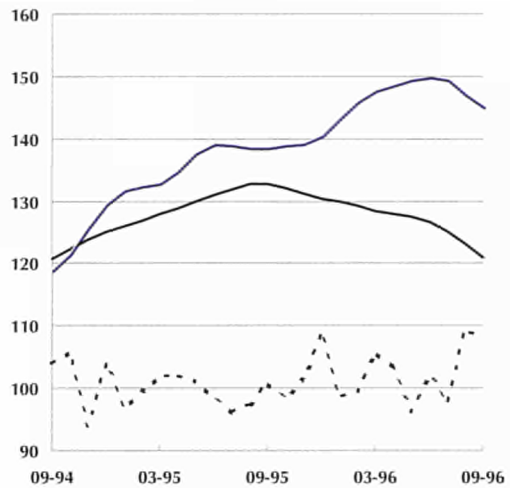


Source: eurostat

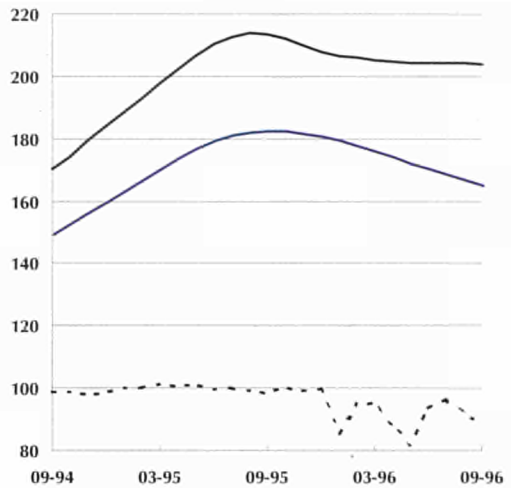
Figure 3.16

Foreign trade indices in ECU terms, trend cycle (1990 = 100)

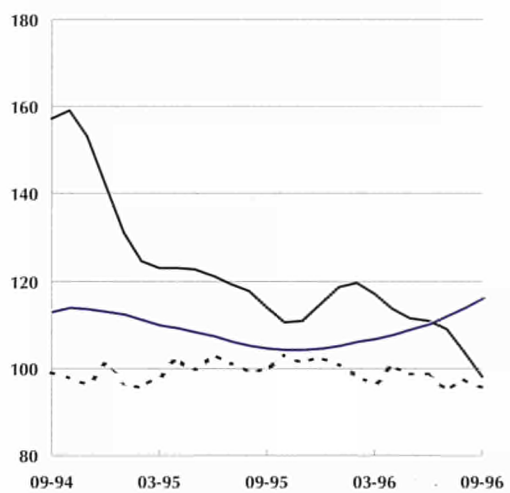
Ireland



Italia



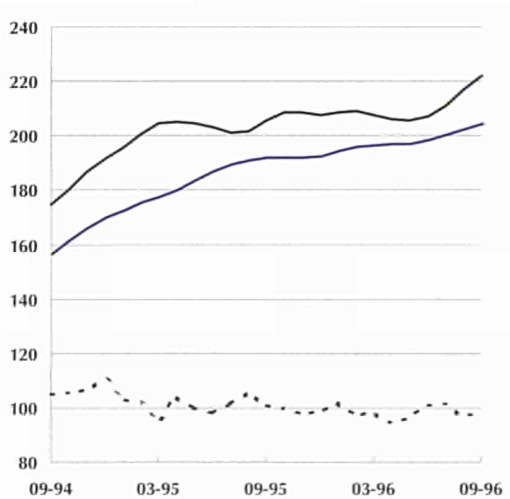
Nederland



Österreich

Not available

Portugal



Suomi / Finland

Not available

Export value index

Import value index

Terms of trade

Source: eurostat

eurostat

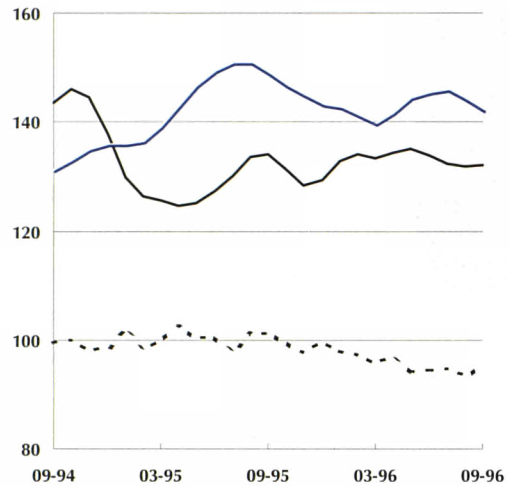
Figure 3.16

Foreign trade indices in ECU terms, trend cycle (1990 = 100)

Sverige

Not available

United Kingdom



Export value index

Import value index

Terms of trade

Further information - the foreign trade indices:

For the indices of imports and exports, foreign trade data of industrial products (following the nomenclature of the Harmonised System) were grouped according to the industrial NACE Rev.1 activity to which they belong. This grouping of products causes inevitably certain inaccuracies which can reduce the reliability of these foreign trade series. The indices for EUR15 refer only to extra-Union trade, the indices for Member States reflect also intra-Union trade.

For more extensive details of the methodology of short-term indicators please refer to the Eurostat publication "Methodology of Industrial Short-term Indicators" - CA-97-96-079-EN-C.

Full methodological notes for this publication may be found on page 71.

Source: eurostat

The files on the diskette are broken down by industrial branches. Each file contains all countries and indicators for a particlar industry. The files have the following format: country, indicator, branch, periodicity, datatype, data e.g. EF,PROD,B0020,M,S,85.14164...

Step by step guide to using the data on the diskette:

1. Copy the file MPEI.EXE from the diskette to a directory on your hard disk (usually C:\....).
2. If in WINDOWS, switch to the File Manager and double-click on the file. The files will self-extract themselves (into the directory from which the program is run). You may need to perform WINDOW - REFRESH to see the files once the procedure has finished.
3. If in DOS move to the directory you placed the file in (for example, C:\DATA>) and then type the name of the file (MPEI.EXE) and press <ENTER>, the files will self-extract and be placed in the same directory as the EXE.
4. The files are simple, plain text files, with the .TXT extension. The files are comma separated and use speech marks as a delimiter.
5. It should be easy to import/open the data-files into any standard spreadsheet or database package.
6. There is a file for each branch available at the NACE 2-digit level, codes are given in the readme.txt file supplied on the diskette.

Branches:

B0020 Total Industry Excluding Construction
B0040 Intermediate Goods Industry
B0050 Capital Goods Industry
B0060 Durable Consumser Goods Industry
B0070 Non-Durable Consumser Goods Industry
B1000 Mining of Coal and Lignite; Extraction of Peat
B1100 Extraction of Crude Petroleum and Natural Gas; Service Activities Incidental to oil and Gas Extraction, excluding Surveying
B1200 Mining of Uranium and Thorium Ores
B1500 Food and Drink Industry
B1600 Tobacco
B1700 Manufacture of Textiles
B1800 Clothing Industry
B1900 Leather and Shoe Industry
B2000 Manufacture of Wood and Products of Wood
B2100 Paper Industry
B2200 Publishing, Printing, Reproduction of Recorded Media
B2300 Manufacture of Coke, Refined Petroleum Produts, Nuclear Fuel
B2400 Chemical Industry
B2500 Manufacture of Rubber and Plastic Products
B2600 Manufacture of Other Non-Metallic Mineral Products
B2700 Manufacture of Basic Metals
B2800 Manufacture of Fabricated Metal Products
B2900 Mechanical Engineering
B3000 Manufacture of Office Machinery, Computers
B3100 Manufacture of Electrical Machinery
B3200 Manufacture of Radio, TV and Communication Equipment
B3300 Manufacture of Medical, Precision and Optical Instruments
B3400 Manufacture of Motor Vehicles
B3500 Manufacture of Other Transport Equipment
B3600 Manufacture of Furniture; Manufacturing not elsewhere classified
B4000 Electricity, Gas, Steam and Hot Water Supply
B4500 Construction

Industry classification system

NACE Rev.1,
definitions of main industrial groupings

Statistical sources

sources and methods used for short-term indicators and structural data; notes on series used and calculation methods

Signs and abbreviations

specific to use in this publication

Industry classification system

The economic activities used in this publication are defined in the revised Classification of Economic Activities within the European Communities, NACE Rev.1. This classification was laid down in a Council Regulation in 1990 (OJ L293 24th October 1990). It should be noted that many series before 1990 and a large amount of annual data even between 1990 and now had to be converted from the old classification NACE 1970. This estimation process can reduce the reliability of the data. Broad industrial groups that are used in Section 2 of this publication have the following definitions in terms of NACE Rev.1.

Total industry

C + D + E,

i.e. mining, manufacturing and energy supply

Intermediate goods industries

13.1, 13.2, 14.1-14.5, 15.6, 15.7, 17.1-17.3, 20.1-20.5, 21.1, 21.2, 24.1-24.3, 24.6, 24.7, 25.1, 25.2, 26.1-26.8, 27.1-27.5, 28.4-28.7, 31.2-31.6, 32.1, 34.3, 37.1, 37.2

Capital goods industries

28.1-28.3, 29.1-29.6, 30.0, 31.1, 32.2, 33.1-33.3, 34.1, 34.2, 35.1-35.3

Durable consumer goods industries

29.7, 32.3, 33.4, 33.5, 35.4, 35.5, 36.1-36.3

Non durable consumer goods industries

15.1-15.5, 15.8-16.0, 17.4-17.7, 18.1-18.3, 19.1-19.3, 22.1-22.3, 24.4, 24.5, 36.4-36.6

Statistical sources

Most of the data in this publication is harmonised data supplied to Eurostat by the EU Member States. The exceptions are:

1) The capacity utilisation series which come from the business surveys carried out on behalf of the Directorate General for Economic Affairs of the Commission (DG II).

2) The estimates for the latest years' structural data, which are supplied by the DEBA European Economic Interest Group:

DEBA GEIE, 1, rue Emile Bian,

L-1235 Luxembourg;

tel: (352) 29 77 71-1.

3) The data for the USA and Japan, which are supplied by the OECD.

Data sources are indicated for each statistical table. Every effort has been made to include data for the EUR15 Member States. The indices from 1991 onwards are on a post-unification basis and include East-Germany. However the structural data is still on a pre-unification basis.

Short term indicators

The index of production measures changes in the volume of the gross value added created by industry, the branch indices being aggregated by means of a system of weighting according to gross value added at factor cost. The indices are adjusted to take account of the varying number of working days in the month.

The index of producer prices shows (in national currencies) the changes in the ex-works selling prices of all products sold on the domestic markets of the various countries. The EU indices refer to overall weighted price changes. There are not yet indices for Austria. No seasonal adjustment is carried out on these indices.

For the indices of imports and exports, external trade data of 9000 industrial products were grouped according to the industrial NACE Rev.1 activity to which they belong. This grouping can cause certain inaccuracies in the data, which may reduce the reliability of foreign trade series. The value indices are all in ECU terms. The

indices for the EU refer only to extra-Union trade, the indices for Member States reflect also intra-Union trade.

The capacity utilisation series come from quarterly European Union business surveys.

Seasonal adjustment

All series except prices and capacity utilisation are seasonally adjusted with TRAMO / SEATS, a method developed by Professor Maravall and V. Gomez. This adjustment also takes account of one-off fluctuations (so called outliers). For France, Ireland, Finland, Sweden and the United Kingdom the indices are seasonally adjusted by the national statistical office. In addition, Eurostat calculates the trend cycle, i.e. seasonally adjusted series, where additionally the irregular fluctuations have been excluded (using the program TRAMO / SEATS).

For further details of the methodology employed, please refer to the Eurostat publication "Methodology of Industrial Short-term Indicators" CA-97-96-079-EN-C.

Growth rates

The changes which are given in the tables show two different growth rates. The first being for the latest three months data compared to the previous three months data - here the trend cycle is used. The second growth rate is for the latest three months data compared to the same three months of the previous year - here a series only adjusted for the number of working days is used. Estimates are sometimes made to create a EUR15 total.

Graphs

The line graphs show the trend cycle. The bar graphs show the annual growth of the index, using a working day adjusted series. For Member States where just one month is missing (and not more), this missing value was estimated in order to bring the growth rate for all Member States up to the same date. This estimation is indicated by ** in the graph.

Structural data

Data for structural statistics are in current ECU unless otherwise stated. Data for value added at factor cost, production, labour costs and employment come from annual enquiries conducted by Member States involving all enterprises with 20 or more employees. The exceptions to this are Spain (local units of all sizes), Portugal (enterprises with 10 or more employees) and Finland (establishments employing five or more persons). The employment data relates to the number of persons employed, excluding home workers. The definitions are standardised and so the figures are comparable across industries and countries.

Estimates are not supplied to Eurostat by Member States for the smaller firms not covered by the enquiries, and hence the figures under-report the actual values. In certain industries this may be a serious problem in the interpretation of series, especially when comparing with other industries.

Gaps in Eurostat's data have been filled by estimates supplied by DEBA GEIE. Thus, EUR15 totals often contain estimates for missing countries. Estimates are shown in bold. Attention should be drawn to the fact that the data has just switched to the NACE Rev.1 classification, this may result in revisions of data being made in the medium-term.

Signs and abbreviations

B / L	Belgo-Luxembourg Economic Union
ECU	European currency unit
TRIAD	EU, Japan and the USA
w.d.adj.	working day adjusted series
Billion	thousand million
*	not available (in graphs)
:	not available (in tables)
**	estimation (in graphs)

data in bold, estimation (in tables)

1990 = 100, reference year

Structure of the industry

Main plastics consuming industries

Other applications for plastics

In this section:

For more information on the contents of this section contact:

EuPC (European Plastics Converters)

Mr. A. Dangis
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B - 1040 Brussels

Tel: (+32-2) 732 41 24
Fax: (+32-2) 732 42 18

Structure of the industry

In Europe the plastics processing industry comprises about 30,000 companies. More than 85 % are Small and Medium Sized companies.

The sector of plastics processors has to deal with strong polymer producing companies on one hand and on the other hand with customers such as manufacturers of electrical goods, cars or supermarket chains. Almost 1,000,000 persons are employed in this young industry. Sales reach over 100 Billion ECUs per year and processed plastics more then 30 million tons.

Only a few companies employ more then 1,000 employees per company in Europe. The average is estimated at about 34 employees per company.

The markets covered by the plastics processing industry are packaging, building, transport including automotive, electronics, furniture, agriculture, toys and leisure and others such as healthcare supply.

By country, Germany, France, Italy and the United Kingdom are leading the European plastics industry. In a global context the European Union and the remaining European countries are leading in terms of plastics consumption followed closely by the United States and Japan.

Many processors struggle to survive when plastic raw material prices are unstable. The major issue for plastics converters is therefore to find how to improve their efficiency and to reduce their costs.

The demand for resins shows that plastics are sought after as a material in a wide range of applications, as prices for other materials are increasing at similar or quicker rate. The main plastics materials processed are PVC (Polyvinylchloride), HDPE (High Density Polyethylene), LDPE (Low Density Polyethylene), PP (Polypropylene), PS (Polystyrene), PUR (Polyurethan) and fibre reinforced plastic composites.

Main plastics consuming industries

The Packaging sector represents one third of demand . The food industry is the major end-user.

Despite environmental pressures, the market is still increasing and there is a developing trend to reduce packing weight and volume. This should create long term changes in demand for plastics.

Most of the polymers used in packaging were converted in films.

Plastics films made of PE (Polyethylene), PVC or PET (Polyethylene Terephtalate) are the biggest outlet for the plastics packaging industry. The major end-uses are printing films for automatic packaging, shrink and stretch film for agriculture and horticulture, films for construction, for all kind of bags and sacks...

Other plastics packaging are: bottles, trays, dairy pots, crates, vending cups...

One of the main advantages of plastic packaging is their excellent environmental performance.

By using plastics, more products can be packed with less packaging. Plastics packages are typically 4-40 times lighter than packages made from other materials which are designed to perform similar functions.

Technically, plastics can be recycled several times with little loss of performance. Unfortunately, their most positive environmental characteristic - lightweight - makes recycling plastics more of a challenge.

The second largest market for plastics is building. More than 25 % of the plastics materials find their end-use in applications such as insulation, flooring, window profiles,roofing, pipes, fittings and others.

An annual growth of two percent is estimated in this part of the plastics industry . The issues of concern are the implementation of the Construction Products Directive, the CE marking and the fire safety issues linked to the essential requirements of the CPD.

PVC is very efficient in the building industry. It is a flame retardant material, contributing to an all-round performance as a building material which is unrivalled. Building products have a long life cycle and provide interesting opportunities for the use of recycled plastics materials from products with a short life cycle.

The automotive sector accounts for seven percent of the overall plastics consumption. Thermoplastics in automotive applications should continue to rise at an average of five percent a year until the year 2000. PP has the largest share of demand and represents 42% of the market. Growth for PUR and PVC remain stable. PP is used for interior and exterior products such as cockpits and bumpers.

Other applications for plastics

Household electrical appliances are refrigerators and freezers, washing machines/dishwashers, ovens, food processors, coffee makers...

More than 4 % of plastics are used in the agriculture. Applications include films, tanks, drainage pipes, flowerpots...

Other markets such as furniture and plastic medical appliances should increase in the future.

This text was written by: Alexandre Dangis
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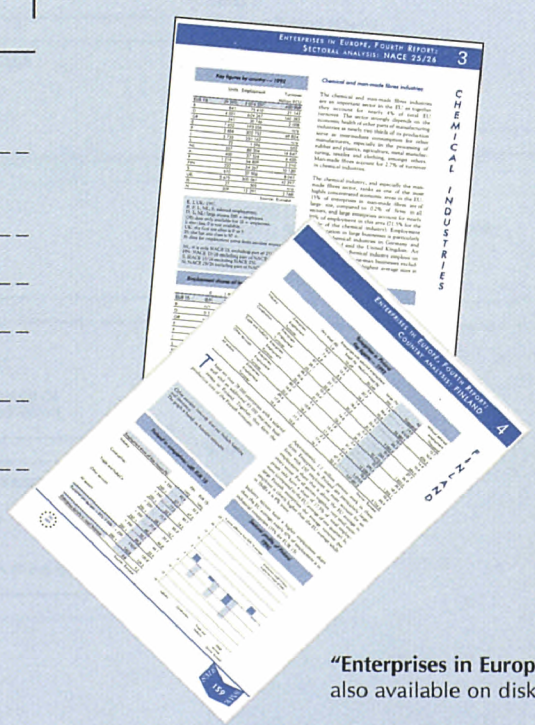

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