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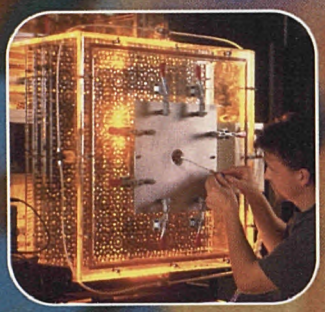
Monthly Panorama of European Industry



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ISSUE 11/97 ■ NOVEMBER 1997

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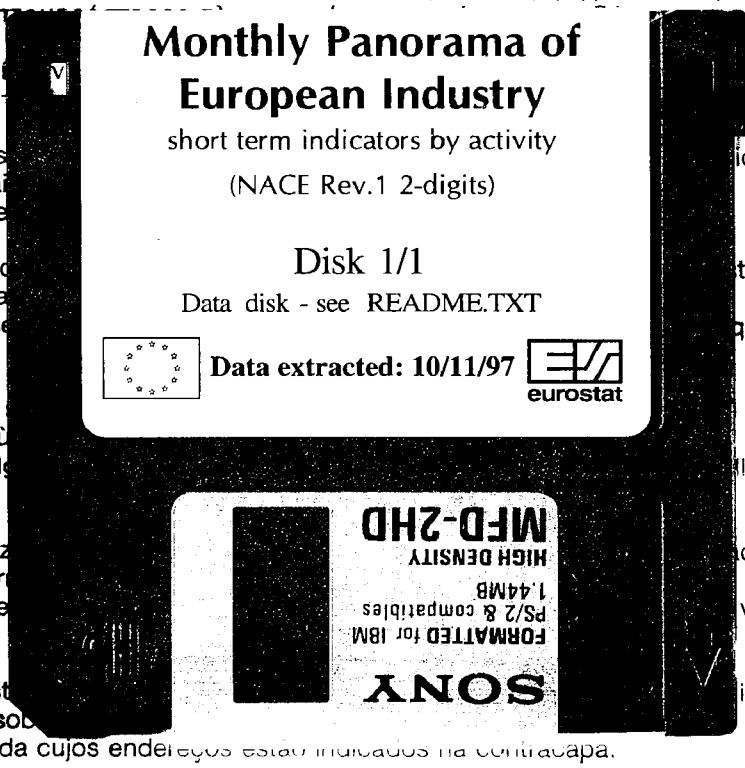

Monthly Panorama of European Industry

ISSUE 11/97 ■ NOVEMBER 1997

Theme
Energy and industry
4

Series
Short-term statistics
B

Sent to press in November 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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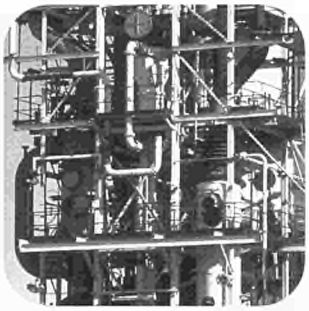

Latest outlook - the most recent short-term indicators for European industry in tabular and graphic format, page 13

In August 1997, EUR15 industrial production continued to show signs of renewed vigour. For the fourth consecutive month the EU posted growth rates higher than those seen in either Japan or the United States. Total industrial production rose by 1.2% in the three months to August (compared to the previous three months). Producer prices continued to expand at a modest pace - the increase in prices quickening somewhat. Prices rose by 1.4% in the twelve months to August 1997.

This second half of this issue of the Monthly Panorama is given over to the subject of electronic equipment (such as radios, televisions and communications equipment), as well as an article on the computer industry. Industrial activity in NACE Rev.1 32 was increasing at a faster pace than the total industry average, the production index rising by 4.3% in the three months to August 1997 (again compared to the three months before). France was the leading EU producer for this activity, accounting for almost twenty per cent of EUR15 output, just ahead of Germany (18%).

In depth - a close look into the electrical engineering industry, page 49

In the computer industry data on prices is made somewhat redundant by the rapid change in product quality and specification. Hence, rather than focus on production and price indices, the final article in this issue draws attention to more general developments in the information society, in particular tracking the development of different computer markets (including hardware, software, telecoms and the Internet).

You will also find a questionnaire on a postcard inserted in this issue - we would be most grateful if you could complete and return it (the postage is paid). The results of the questionnaire will hopefully allow us to improve the quality of the publication next year so that we are better able to meet user needs.

Special focus - the European IT market and the development of the Internet phenomenon, 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.

This publication is a joint project of Eurostat and Directorate General III (Industry policy).
The opinions expressed in this publication are those of the individual authors alone and do not necessarily reflect the position of the European Commission.

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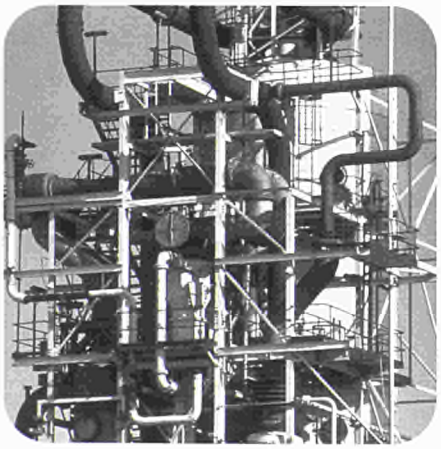
1 Economic commentary



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

Industrial production - three months compared to the previous three months

During periods of vacation (July and August) as well as at Easter and Christmas, the user is advised against using the growth rate t/t-12 (comparing one month with the same month of a year before). Rather, it is far more sensible to base any analysis on the smoothed trend series, where the data has been averaged across a three month period and is then compared to the previous three months - growth rates are not annualised. For this particular commentary (with the exception of one paragraph) all growth rates reported for industrial production refer to the three month on three month growth rate between March to May 1997 and June to August 1997.

Total industry growth faster in the EU than in Japan or the United States

During the three months to August 1997 there was an expansion in European industrial production of 1.2%. Comparable rates for Japan and the United States were 0.8% and 1.1% respectively. This is the fourth consecutive month that the EU has outperformed both Japan and the United States in terms of this particular growth rate (which measures developments over a fairly short time-frame). In April 1997, all three members of the Triad had recorded growth of 1.3%, since when the performance of Japan and the USA has deteriorated, whilst that of the EU has remained constant - gaining only 0.1 percentage points in the month of May 1997.

Performance in the Member States

Turning to the individual Member States for the same period and growth rate: three groups of performance may be determined. Countries displaying growth rates close to the European average include: Denmark (1.5%) and France (1.1%). Countries with growth above the two per cent level were Spain (2.2%), Finland (2.7%), Luxembourg (2.1%) and Sweden (2.1%). Countries with growth below the one per cent level were: Germany (0.8%), Greece (0.2%), the Netherlands (0.5%) and the United Kingdom (0.9%).

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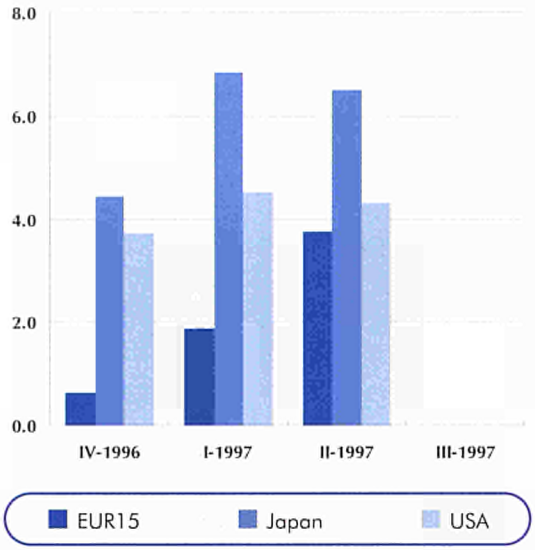
Industrial production for the EU is growing at a faster pace than in Japan or the USA

Figure 1.1



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

Source: eurostat

Production trends: mixed signs in a few economies...

It is difficult to determine whether or not the Greek or Dutch economies are going into a period of reduced activity - rather, it would seem that the data shows a brief deterioration in the rate of output growth. In the United Kingdom there appear to be signs of an expansion of total industrial production, with the growth rate expanding in consecutive months from 0.1% in April 1997 through to 0.9% by August 1997. None of the Member States have recorded a negative change in the trend of output since February 1997.

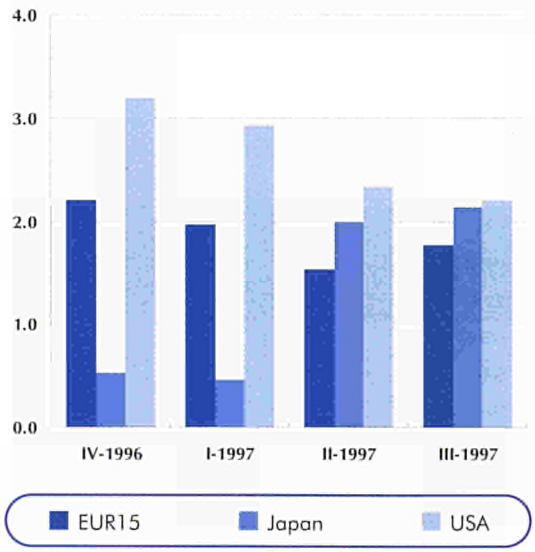
...whilst steady growth is apparent in the majority of Member States

German industrial production followed a pattern of gradual expansion, which began in March 1996. Production growth expanded at a faster pace in Spain from June 1996 onwards - reaching 2.6% growth in May 1997 - however, data for the last three months has shown growth rates slowing somewhat. In Scandinavia the production index has been growing since the start of 1996 (later in Denmark), with a steady expansion of production growth in Sweden, whilst in Finland output grew initially at a faster pace (through to November 1996), since when production growth has been recorded at or above the two per cent level.

Capital goods and intermediate goods continue to lead the expansion

The trend in recent months of the recovery being led by the capital and intermediate goods sectors continued through to August 1997. From the start of 1997, the consumer durables sector showed a rapid increase in rates of growth. However, by August 1997, the sector recorded a negative growth rate again. Actual rates of change for EUR15 for August 1997 were: intermediate goods (1.6%), capital goods (2.1%), consumer durables (-1.3%) and consumer non-durables (0.1%).

Figure 1.2

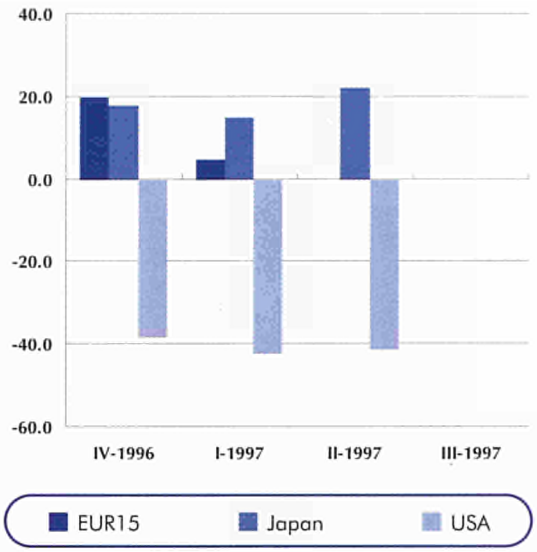


Year on year growth rates (t/t-4) for consumer prices (%)

Source: eurostat

Figure 1.3

Quarterly trade balance (billion ECU)



Source: eurostat

Gradual increase in producer price inflation continues

The situation was somewhat different across in the Member States: generally intermediate goods and capital goods were leading the recovery. For example in Germany (intermediate goods rose by 1.3% and capital goods by 1.3% too). In Spain capital goods sector rose by 3.7%. Consumers do not seem to be responding to the data showing that the recovery is expanding. In Germany and Italy low levels of growth in consumer goods sectors were recorded (especially consumer non-durables in Germany). Indeed, with the exception of Denmark (1.5%) none of the Member States were able to record growth in consumer non-durables sector greater than one per cent - in many countries the sector is still in contraction. In the consumer durables sector the picture was more encouraging - with growth of more than two per cent in Denmark (4.3%), Finland (5.1%), Greece (4.0%), Spain (4.1%) and the United Kingdom (2.3%).

Year on year growth rates for August 1997

Turning to changes observed between August 1996 and August 1997, there were large gains recorded by many Member States. Nevertheless, as stated above, little significance can be attached to these "one-off" figures. The reader should be aware that this growth rate takes no account of what has happened between August 1996 and August 1997. The data is for a single month and the growth rates are therefore far more volatile (despite being adjusted for the different number of working days).

Output rose in the EU by 4.2% in the twelve months to August 1997. Comparable growth rates in the Member States were: Germany (1.7%), Italy (5.2%), Spain (10.0%) and the United Kingdom (2.3%). International comparison showed rates of growth for total industry equal to 5.4% in Japan and 4.6% in the United States.

Table 1.1

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

	EUR15	Japan	USA
09-96	0.2	4.7	2.6
10-96	1.3	5.3	3.2
11-96	0.8	4.9	3.9
12-96	-0.3	3.2	4.1
01-97	1.5	7.6	4.9
02-97	2.7	5.8	4.1
03-97	1.4	7.2	4.6
04-97	5.5	4.8	5.2
05-97	2.1	7.8	4.2
06-97	3.6	7.0	3.6
07-97	5.7	5.0	4.8
08-97	4.2	5.4	4.6

Source: eurostat

Expansion of producer prices continues quicken

EUR15 producer prices for total industry continued to rise at a faster pace, up by 1.4% in August 1997 (compared to August 1996). Prices increased 0.1 percentage points more than in July 1997. In the Member States the situation for total industry was the following (again using growth rates given as a comparison between August 1996 and August 1997), based on gross data (i.e. untreated): France (0.6%), Germany (1.5%), Italy (1.7%), Spain (1.7%) and the United Kingdom (0.6%).

International comparison shows no signs of a change in the trends observed over the last five months. Whilst EU producer prices increased at a very gradual pace, price increases in Japan remained just under the two per cent level (1.9% and 1.7% in July and August 1997). In the United States, the period of producer price deflation continued (though it gained 0.1 percentage points in August 1997 compared to the figures of a month before), resulting in price deflation of 0.8% in August 1997.

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Table 1.2

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

	EUR15	Japan	USA
10-96	2.3	0.6	3.0
11-96	2.2	0.5	3.3
12-96	2.1	0.5	3.3
01-97	2.2	0.5	3.0
02-97	2.0	0.5	3.0
03-97	1.7	0.4	2.8
04-97	1.5	1.9	2.5
05-97	1.5	1.9	2.2
06-97	1.6	2.2	2.3
07-97	1.7	1.9	2.2
08-97	1.8	2.1	2.2
09-97	1.8	2.4	2.2

Source: eurostat

Table 1.3

Monthly trade balance (billion ECU)

	EUR15	Japan	USA
09-96	1.2	7.0	-14.2
10-96	7.7	4.6	-12.2
11-96	6.4	6.0	-11.9
12-96	5.8	7.3	-14.2
01-97	-2.3	1.6	-14.9
02-97	3.1	6.1	-14.4
03-97	3.9	7.3	-12.9
04-97	3.2	7.0	-13.6
05-97	:	6.8	-14.2
06-97	:	8.4	-13.4
07-97	:	8.2	-15.2
08-97	:	7.2	-16.2

Source: eurostat

Other Eurostat products

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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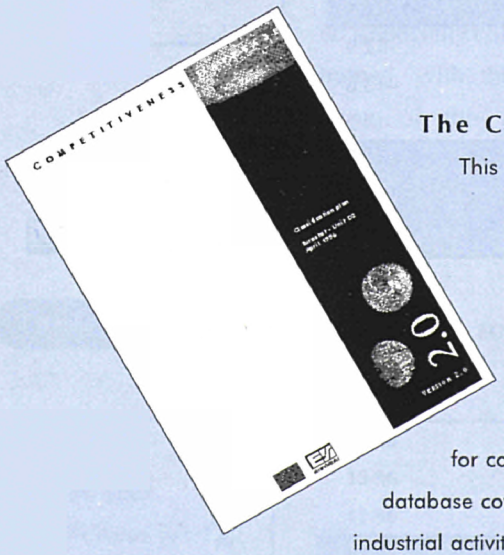
★ and data from National Accounts.

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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2 Latest outlook

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: 10/11/97

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	06-97 ⇨ 08-97	↗	↗	↗	↘	→
B	05-97 ⇨ 07-97	→	↗	→	↘	→
DK	06-97 ⇨ 08-97	↗	↗	↗	↗↗	↗
D	07-97 ⇨ 09-97	↗	↗	↗	→	↘
EL	06-97 ⇨ 08-97	→	↗	↗	↗↗	↘
E	06-97 ⇨ 08-97	↗	↗↗	↗↗	↗↗	↗
F	05-97 ⇨ 07-97	↗	→	↗	→	→
IRL	05-97 ⇨ 07-97	↗↗	↗↗	↗↗	:	↗
I	06-97 ⇨ 08-97	↗	↗↗	↘	↘↘	↗
L	05-97 ⇨ 07-97	↗	↗↗	↗	↘↘	↘
NL	06-97 ⇨ 08-97	→	↗	→	↗	↗
A	08-96 ⇨ 10-96	↗	↗	↗	↗↗	↗
P	05-97 ⇨ 07-97	↗	↗	↘	↘	→
FIN	06-97 ⇨ 08-97	↗↗	↗↗	↗↗	↗↗	→
S	06-97 ⇨ 08-97	↗	↗	↗↗	↗	→
UK	06-97 ⇨ 08-97	↗	↗	↗	↗	→
Japan	06-97 ⇨ 08-97	↗	→	↗	↘	→
USA	06-97 ⇨ 08-97	↗	→	↗	↗	→

Growth rates:

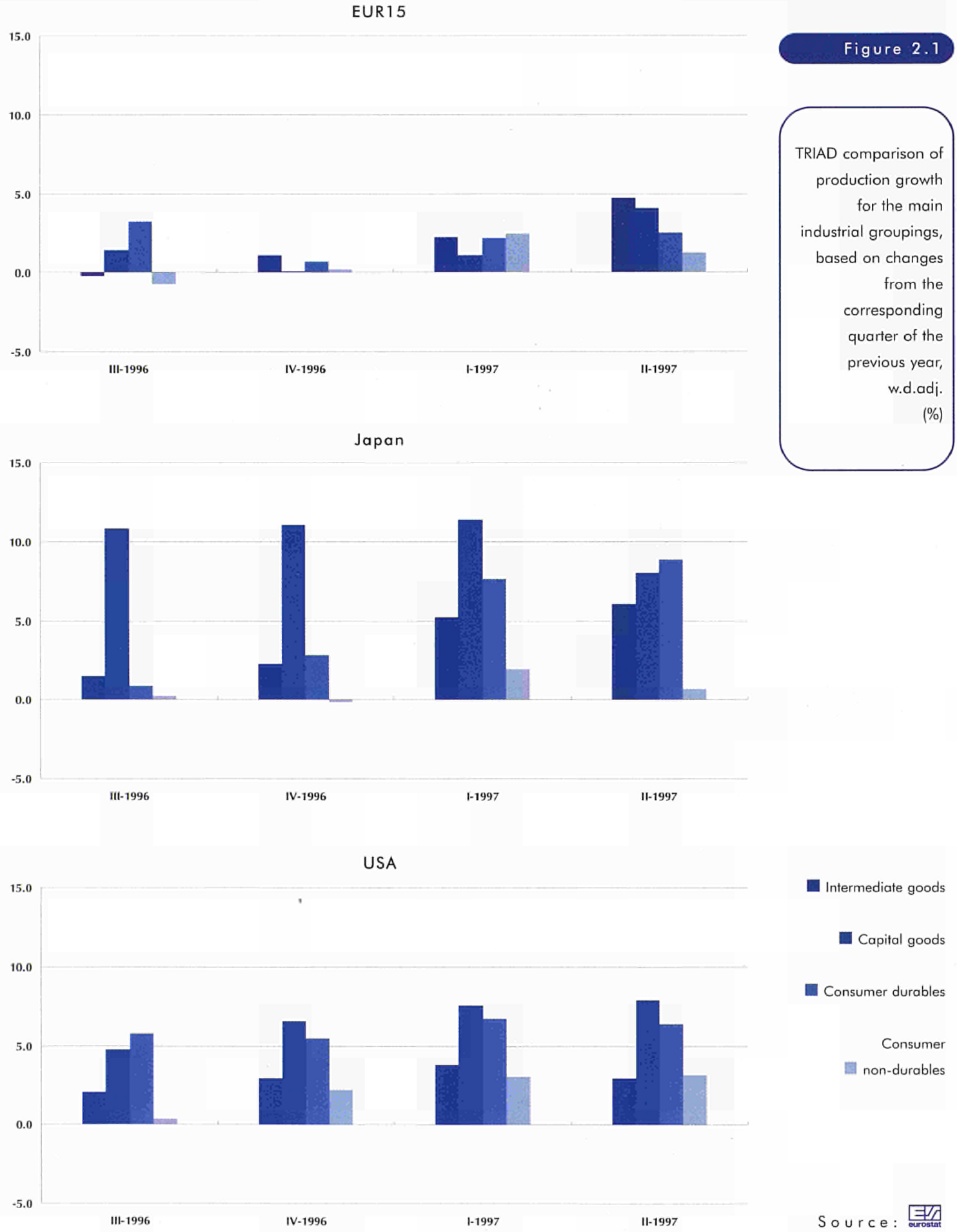
↗↗	>2.5%		
↗	0.5%	→	2.5%
→	-0.5%	→	0.5%
↘	-2.5%	→	-0.5%
↘↘	<-2.5%		

Source: 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

PRODUCTION INDEX - W.D.ADJ.

Table 2.2

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

	1994	1995	1996	03-97	04-97	05-97	06-97	07-97	08-97
EUR15	99.4	103.4	103.5	112.1	109.4	105.8	111.4	105.0	85.0
B	94.7	100.9	102.4	111.6	105.6	109.0	107.7	92.9	:
DK	111.1	115.8	117.1	126.0	120.3	117.3	134.2	99.1	123.5
D	93.9	95.9	96.0	102.2	100.6	94.3	102.9	101.6	88.5
EL	95.7	97.4	98.4	97.9	97.2	99.0	105.9	106.6	91.4
E	98.6	103.2	102.1	113.3	115.5	109.3	116.6	114.5	71.5
F	97.7	99.6	99.7	106.7	107.4	99.2	107.0	97.8	79.5
IRL	133.3	158.5	171.1	210.8	193.6	192.4	204.7	187.3	:
I	101.7	107.9	104.9	116.0	112.6	114.1	116.1	113.0	54.6
L	100.5	101.0	100.6	107.0	111.3	109.4	110.3	109.1	:
NL	103.2	106.7	110.2	117.6	116.1	110.1	111.8	95.8	93.5
A	105.9	112.3	:	:	:	:	:	:	:
P	94.9	99.4	100.8	104.4	104.7	101.3	108.2	108.6	:
FIN	106.5	114.1	118.3	130.8	130.2	131.6	134.9	98.9	121.2
S	103.8	116.8	120.4	135.2	130.9	131.7	139.7	89.4	119.0
UK	103.8	106.2	107.1	115.2	107.1	104.8	107.6	104.6	98.2
Japan	93.1	96.3	98.6	112.5	102.3	98.6	107.0	106.8	94.9
USA	109.8	113.4	116.5	119.9	119.8	119.4	123.3	120.4	125.8

Source: eurostat

Table 2.3

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

	1994	1995	1996	03-97	04-97	05-97	06-97	07-97	08-97
Total industry									
EUR15	99.4	103.4	103.5	112.1	109.4	105.8	111.4	105.0	85.0
Japan	93.1	96.3	98.6	112.5	102.3	98.6	107.0	106.8	94.9
USA	109.8	113.4	116.5	119.9	119.8	119.4	123.3	120.4	125.8
Intermediate goods									
EUR15	101.7	104.9	104.2	113.5	112.1	107.8	111.6	106.3	87.5
Japan	95.5	99.3	99.7	108.8	104.4	101.0	106.9	106.5	96.7
USA	104.1	105.4	107.3	107.1	107.2	107.5	112.4	112.4	114.8
Capital goods									
EUR15	92.1	99.5	101.4	109.3	106.7	103.1	114.6	103.3	80.5
Japan	85.6	89.5	97.6	126.2	98.8	95.6	105.6	104.7	93.8
USA	103.7	108.6	113.7	119.9	120.7	121.2	125.2	120.9	127.5
Consumer durables									
EUR15	95.4	96.8	97.3	111.6	105.0	98.4	107.2	97.1	59.1
Japan	82.3	81.3	79.6	94.5	83.6	79.8	90.8	86.4	63.0
USA	114.5	120.9	127.0	134.0	134.7	134.5	138.6	131.1	139.9
Consumer non-durables									
EUR15	102.5	104.5	103.7	108.6	104.7	104.2	107.5	104.6	89.4
Japan	98.8	98.7	98.3	102.0	102.6	95.5	103.7	103.9	91.1
USA	107.2	108.5	108.6	108.1	109.7	109.6	113.7	112.7	117.0

Source: eurostat

PRODUCTION INDEX - SEASONALLY ADJUSTED

Table 2.4

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

	1994	1995	1996	03-97	04-97	05-97	06-97	07-97	08-97
EUR15	99.4	103.4	103.5	105.3	107.5	105.8	107.5	108.8	107.1
B	94.7	100.9	102.4	102.7	100.9	102.2	100.5	127.8	:
DK	111.1	115.8	117.1	118.4	120.5	120.7	121.0	124.6	121.8
D	93.9	95.9	96.0	97.7	101.0	98.0	101.6	102.8	99.3
EL	95.7	97.4	98.4	100.2	99.9	100.4	100.3	100.7	99.0
E	98.6	103.2	102.1	106.8	110.4	107.0	108.9	109.8	112.4
F	97.7	99.6	99.7	100.6	103.7	102.2	102.3	105.2	105.2
IRL	133.3	158.5	171.1	194.8	190.2	187.9	194.8	200.9	:
I	101.7	107.9	104.9	107.5	107.5	107.6	108.2	109.0	110.9
L	100.5	101.0	100.6	101.9	104.4	103.5	104.3	110.0	:
NL	103.2	106.7	110.2	111.2	112.9	112.1	112.6	112.5	111.7
A	105.9	112.3	:	:	:	:	:	:	:
P	94.9	99.4	100.8	101.9	102.0	100.8	103.7	103.2	:
FIN	106.5	114.1	118.3	126.1	125.5	125.3	127.7	133.1	129.0
S	103.8	116.8	120.4	129.6	124.6	126.9	127.7	128.5	129.8
UK	103.8	106.2	107.1	108.3	109.2	108.2	110.1	111.2	110.8
Japan	93.1	96.3	98.6	102.1	101.8	106.0	103.0	104.3	102.0
USA	109.8	113.4	116.5	120.2	120.7	120.9	121.3	121.8	122.7

Source: eurostat

Table 2.5

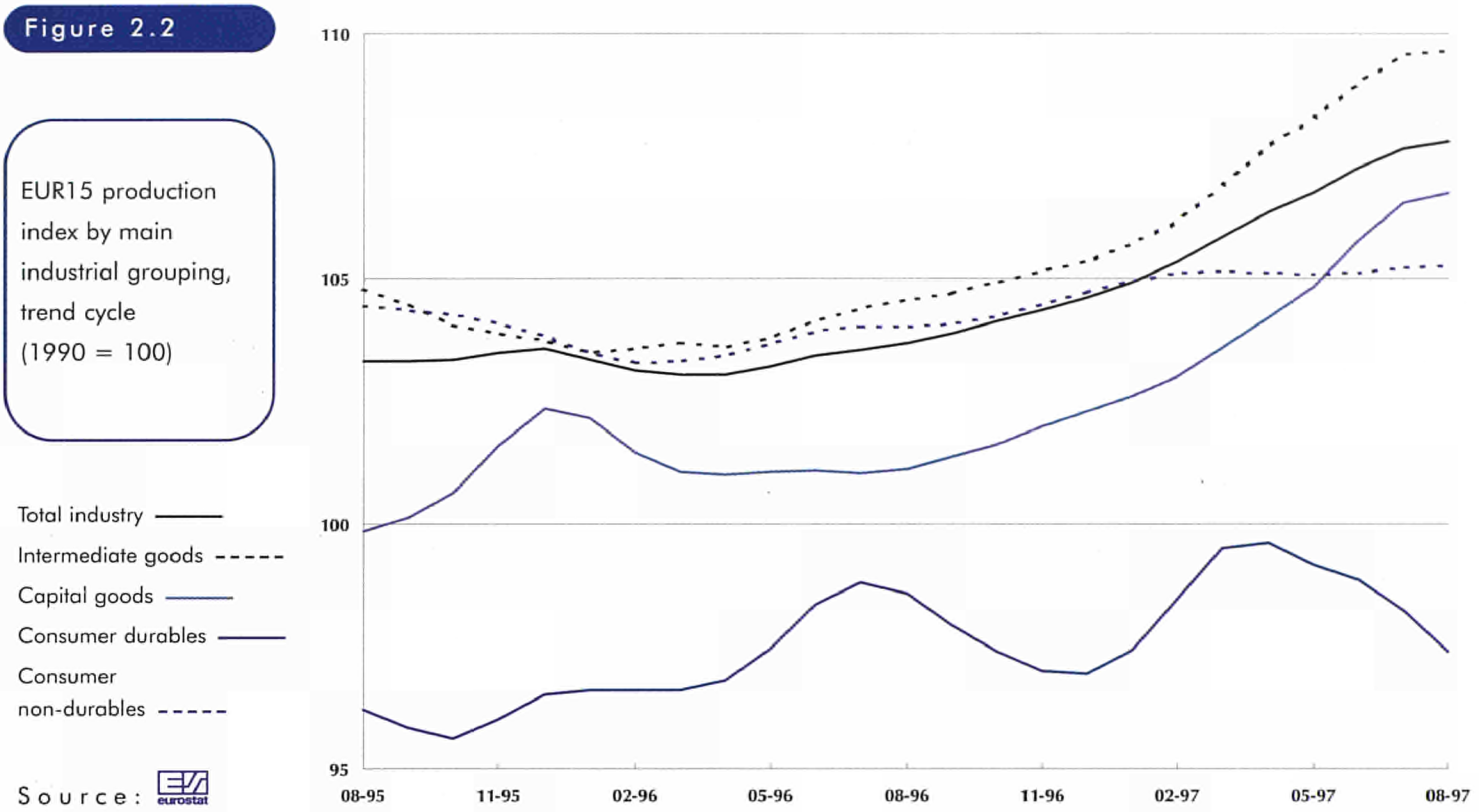
TRIAD comparison of indices of production for the main industrial groupings, seasonally adjusted (1990 = 100)

	1994	1995	1996	03-97	04-97	05-97	06-97	07-97	08-97
Total industry									
EUR15	99.4	103.4	103.5	105.3	107.5	105.8	107.5	108.8	107.1
Japan	93.1	96.3	98.6	102.1	101.8	106.0	103.0	104.3	102.0
USA	109.8	113.4	116.5	120.2	120.7	120.9	121.3	121.8	122.7
Intermediate goods									
EUR15	101.7	104.9	104.2	106.1	109.0	107.4	109.0	110.9	108.9
Japan	95.5	99.3	99.7	103.8	102.9	105.9	103.0	104.4	103.1
USA	104.1	105.4	107.3	110.0	109.9	110.1	109.6	109.2	109.4
Capital goods									
EUR15	92.1	99.5	101.4	102.4	105.8	102.8	106.6	108.4	105.8
Japan	85.6	89.5	97.6	101.6	100.5	107.2	104.8	105.6	103.2
USA	103.7	108.6	113.7	120.2	121.0	121.6	123.0	123.3	125.3
Consumer durables									
EUR15	95.4	96.8	97.3	101.3	101.4	96.9	100.8	106.1	96.4
Japan	82.3	81.3	79.6	82.9	82.8	88.5	82.4	84.3	76.8
USA	114.5	120.9	127.0	133.0	133.6	134.0	135.4	136.0	138.1
Consumer non-durables									
EUR15	102.5	104.5	103.7	105.0	105.3	104.8	105.0	105.4	105.2
Japan	98.8	98.7	98.3	97.5	98.5	101.0	96.8	100.5	96.7
USA	107.2	108.5	108.6	111.0	111.0	111.0	110.7	111.3	111.6

Source: eurostat

Figure 2.2

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



Source: eurostat

Table 2.6

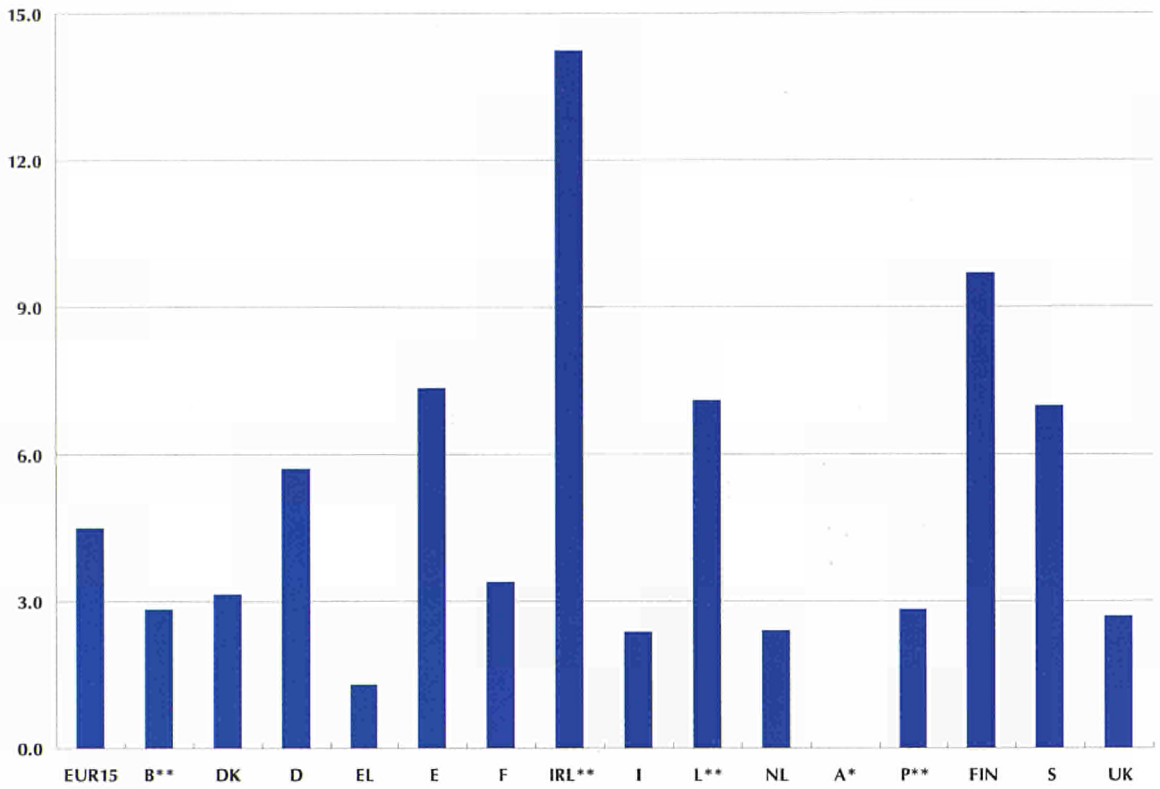
Three month on three month growth rates for the production index of the main industrial groupings, trend cycle (%)

	Latest 3 months available			Total industry	Intermediate goods	Capital goods	Consumer durables	Consumer non-durables
EUR15	06-97	⇨	08-97	1.2	1.6	2.1	-1.3	0.1
B	05-97	⇨	07-97	0.5	1.3	0.4	-0.9	0.0
DK	06-97	⇨	08-97	1.5	1.1	1.3	4.3	1.5
D	07-97	⇨	09-97	0.8	1.2	1.3	-0.5	-0.7
EL	06-97	⇨	08-97	0.2	1.4	0.9	4.0	-1.0
E	06-97	⇨	08-97	2.2	2.7	3.7	4.1	0.6
F	05-97	⇨	07-97	1.2	0.1	1.4	0.3	0.2
IRL	05-97	⇨	07-97	3.5	4.6	2.6	:	0.8
I	06-97	⇨	08-97	1.7	2.6	-1.9	-2.5	0.8
L	05-97	⇨	07-97	2.1	2.8	1.2	-7.3	-0.6
NL	06-97	⇨	08-97	0.5	0.9	-0.3	1.0	0.5
A	08-96	⇨	10-96	1.3	0.5	1.7	2.6	1.2
P	05-97	⇨	07-97	0.9	0.8	-1.2	-0.7	-0.2
FIN	06-97	⇨	08-97	2.7	3.1	5.8	5.1	0.4
S	06-97	⇨	08-97	2.2	1.2	6.6	1.4	0.2
UK	06-97	⇨	08-97	0.9	0.6	1.6	2.3	-0.2
Japan	06-97	⇨	08-97	0.8	0.4	1.3	-1.6	-0.1
USA	06-97	⇨	08-97	1.1	-0.2	2.5	2.0	0.2

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., June-97 to Aug-97 (%)

Source : eurostat

Table 2.7

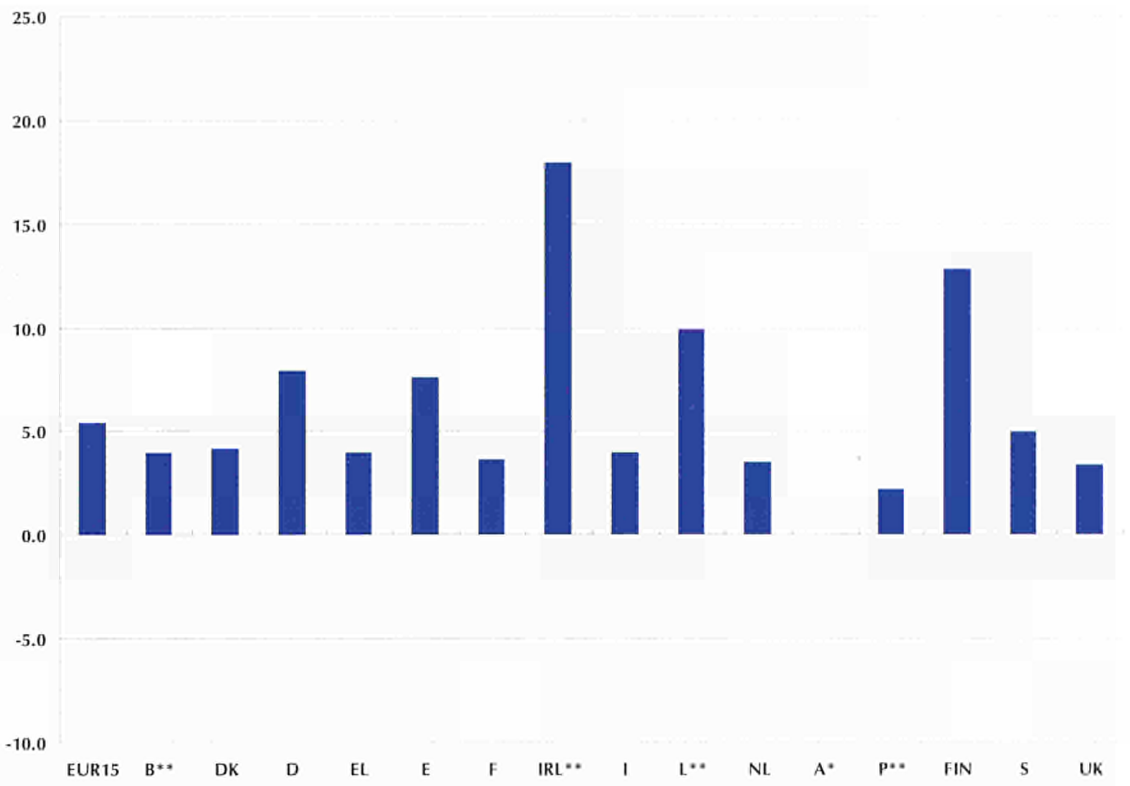
	Latest 3 months available			Total industry	Intermediate goods	Capital goods	Consumer durables	Consumer non-durables
EUR15	06-97	⇨	08-97	4.5	5.4	6.1	2.1	0.9
B	05-97	⇨	07-97	3.2	4.8	8.4	-7.6	0.1
DK	06-97	⇨	08-97	3.1	4.2	-1.3	1.8	5.4
D	07-97	⇨	09-97	4.5	6.9	5.6	-0.7	-1.5
EL	06-97	⇨	08-97	1.3	4.0	8.2	11.3	-2.7
E	06-97	⇨	08-97	7.3	7.6	13.7	9.5	4.6
F	06-97	⇨	08-97	3.4	3.7	5.5	3.7	1.2
IRL	05-97	⇨	07-97	12.5	14.4	19.1	:	0.3
I	06-97	⇨	08-97	2.4	4.0	-3.5	-2.0	2.9
L	05-97	⇨	07-97	5.7	7.9	5.6	-27.6	4.6
NL	06-97	⇨	08-97	2.4	3.5	0.1	2.4	1.9
A	08-96	⇨	10-96	1.5	2.4	4.5	3.3	-0.3
P	05-97	⇨	07-97	1.3	1.4	1.7	1.2	0.7
FIN	06-97	⇨	08-97	9.7	12.8	15.6	22.7	1.4
S	06-97	⇨	08-97	7.0	4.9	13.5	8.8	-2.2
UK	06-97	⇨	08-97	2.7	3.4	6.3	4.4	-0.9
Japan	06-97	⇨	08-97	5.8	5.2	7.3	4.7	0.9
USA	06-97	⇨	08-97	4.3	1.6	8.3	6.7	2.5

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

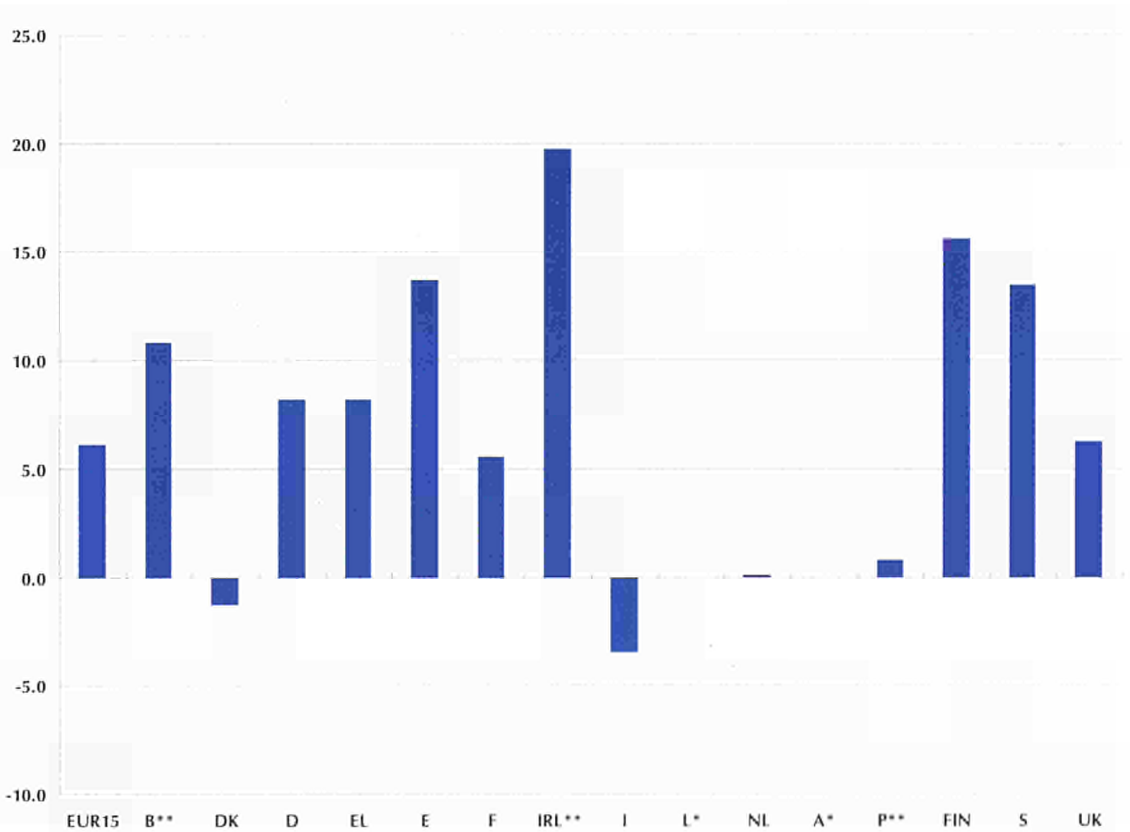
Annual growth rates for the production index of intermediate goods, based on changes from the corresponding three months of the previous year, w.d.adj., June-97 to Aug-97 (%)



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., June-97 to Aug-97 (%)



Source: eurostat

PRODUCTION INDEX - W.D.ADJ.

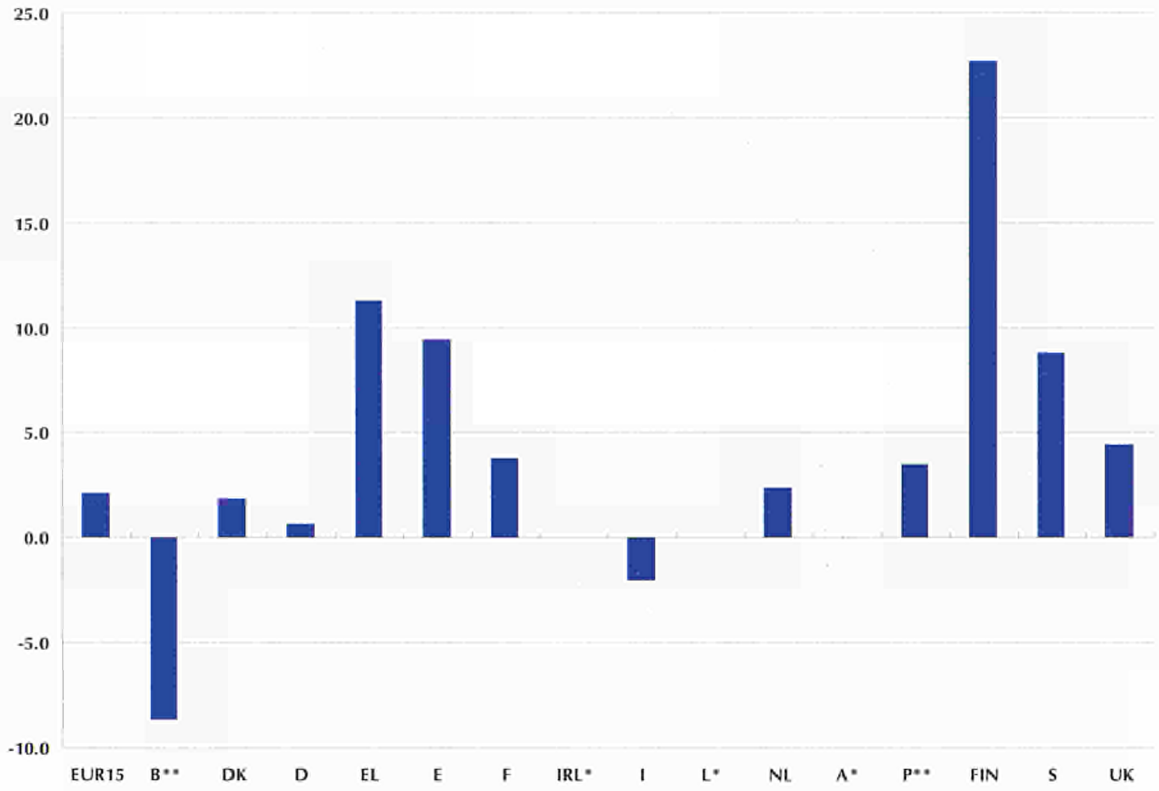


Figure 2.6

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., June-97 to Aug-97 (%)

Source: eurostat

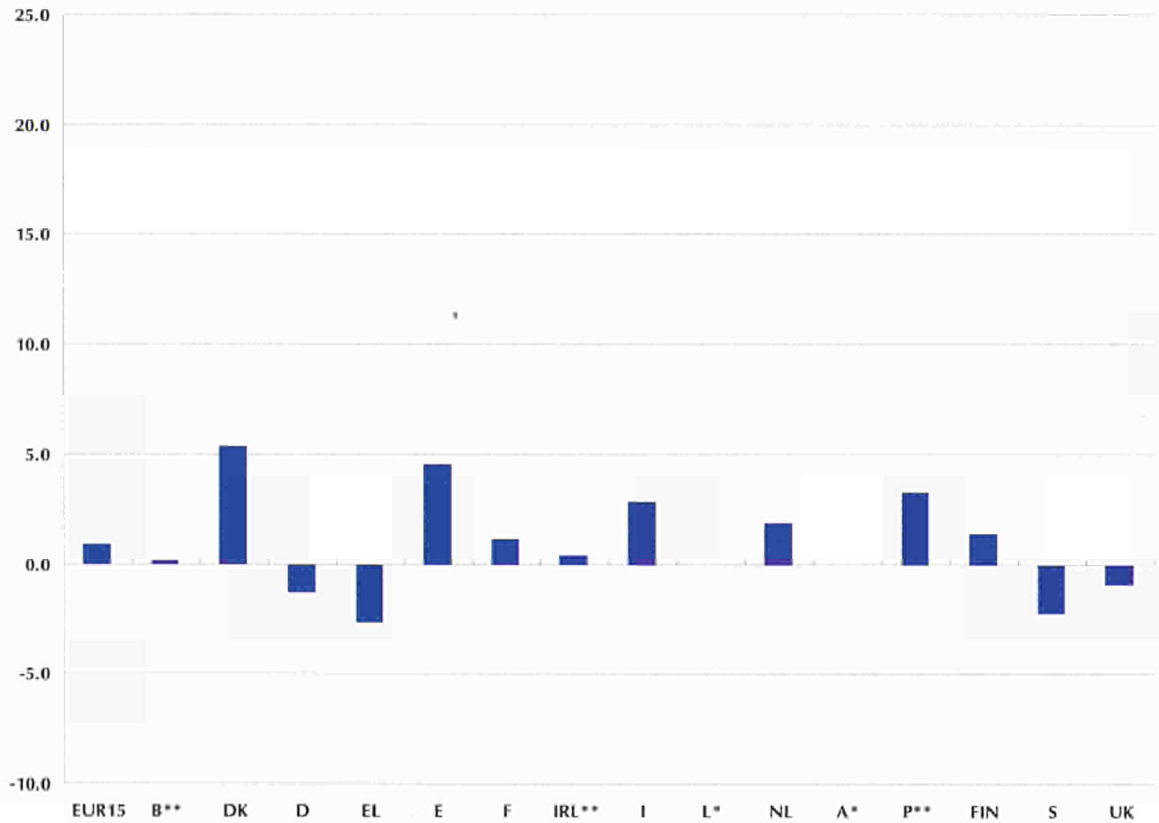


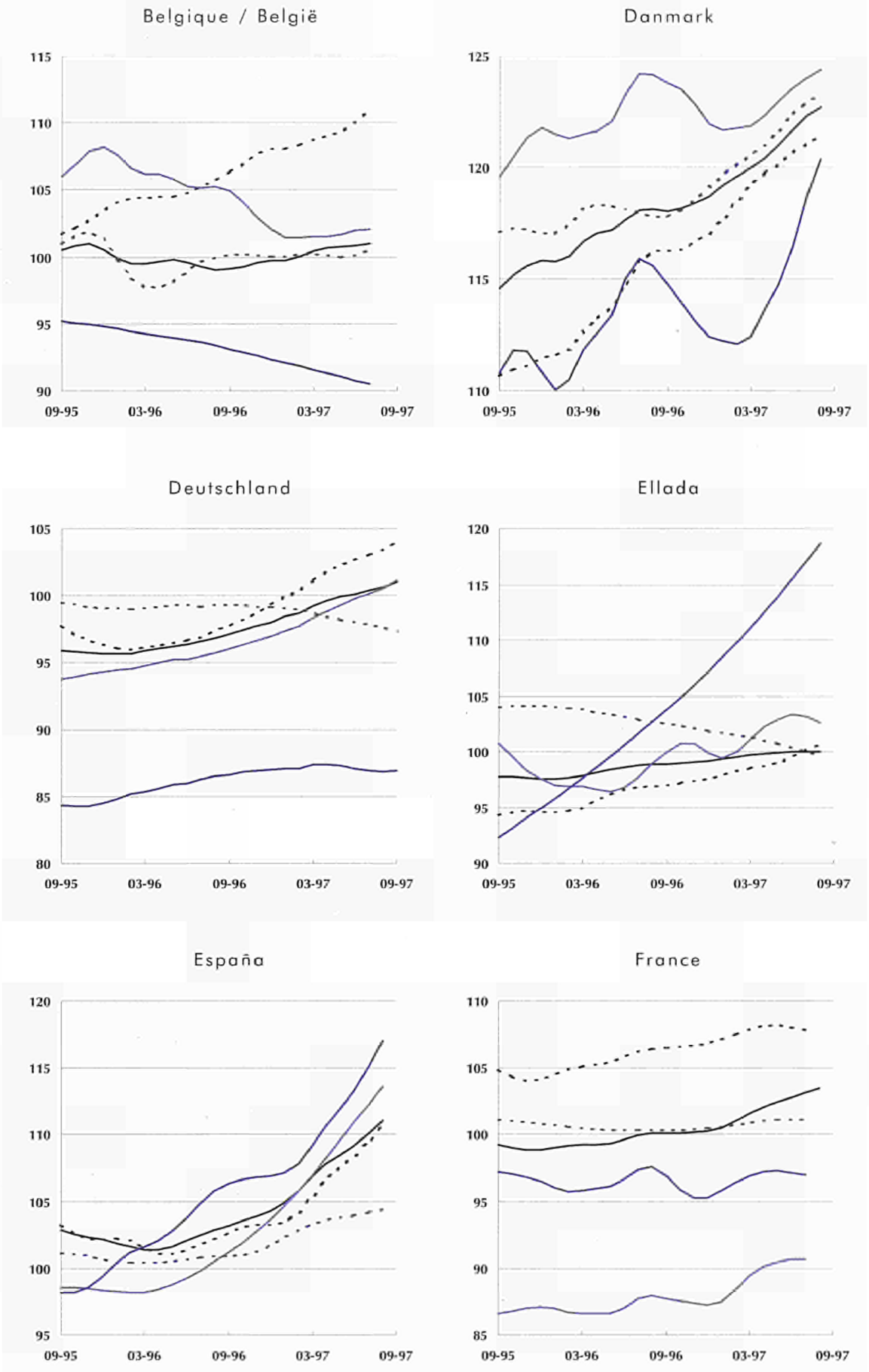
Figure 2.7

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., June-97 to Aug-97 (%)

Source: eurostat

Figure 2.8

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



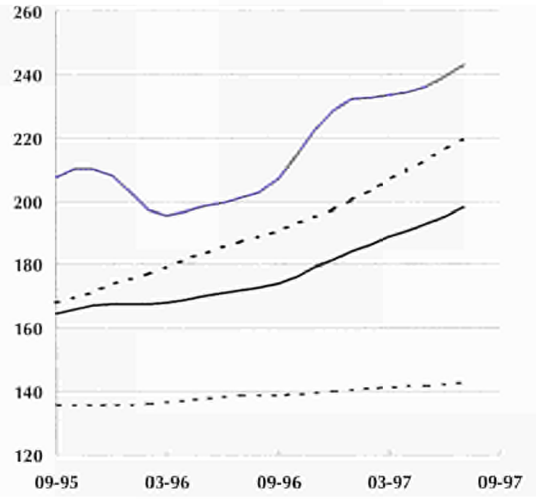
Source: eurostat

PRODUCTION INDEX - TREND CYCLE

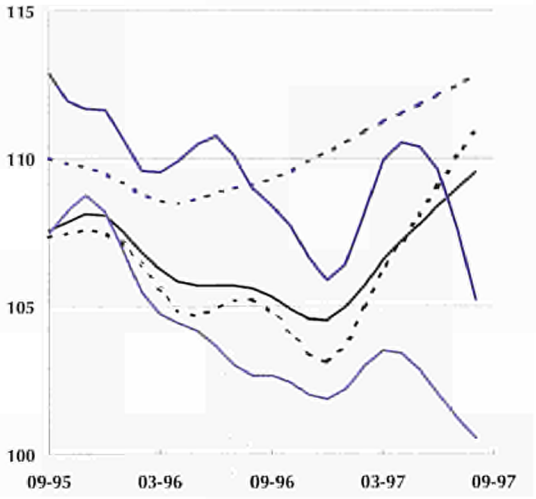
Figure 2.8

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

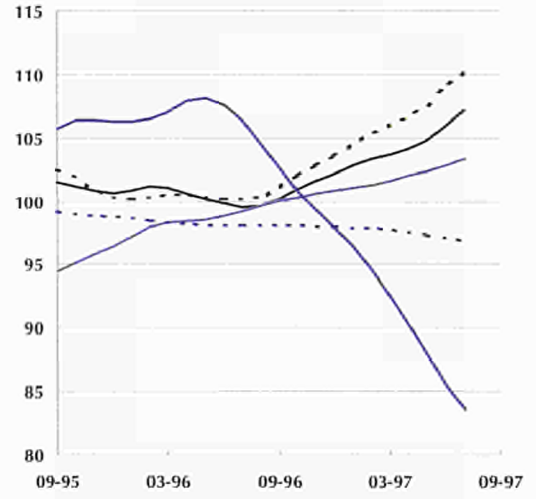
Ireland



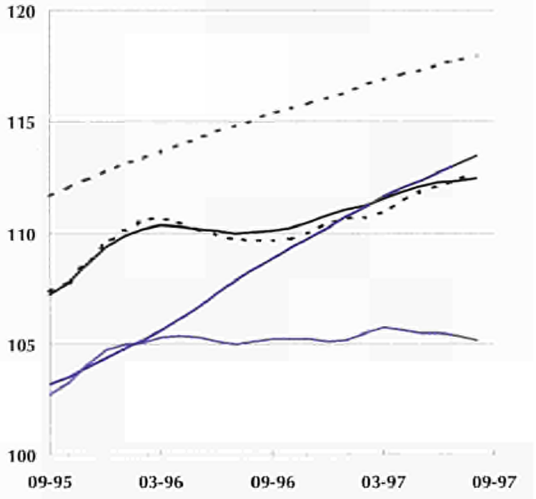
Italia



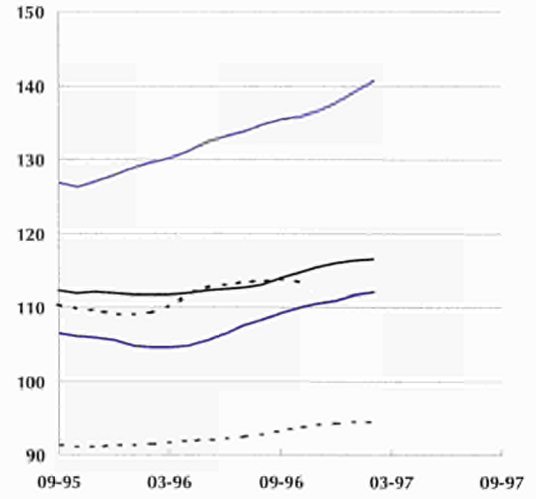
Luxembourg



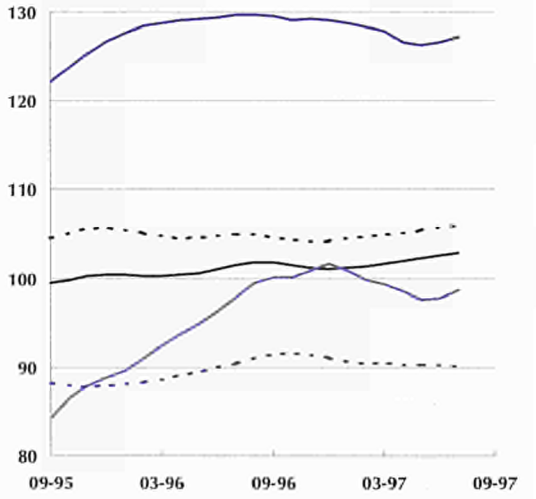
Nederland



Österreich



Portugal



Total industry

Intermediate goods

Capital goods

Consumer durables

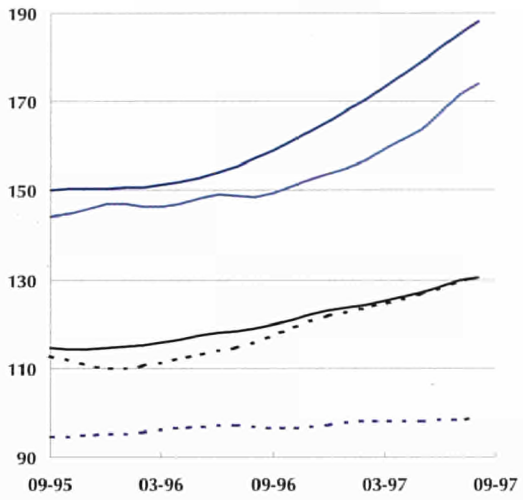
Consumer non-durables

Source: eurostat

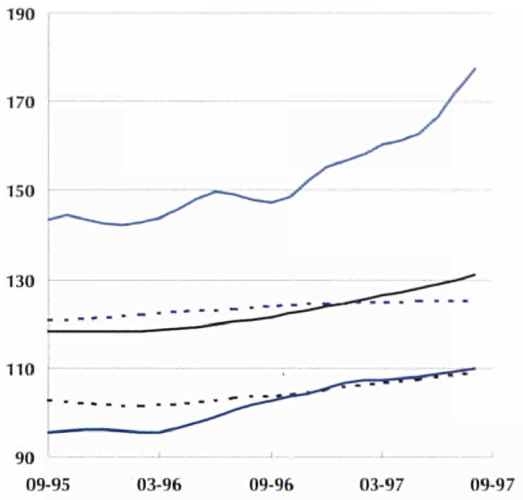
Figure 2.8

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

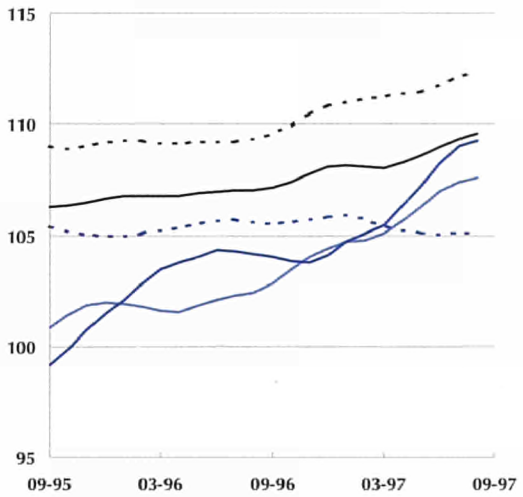
Suomi / Finland



Sverige



United Kingdom



Total industry ——

Intermediate goods - - - - -

Capital goods ——

Consumer durables ——

Consumer non-durables - - - - -

Source: eurostat

Further information - the production index:

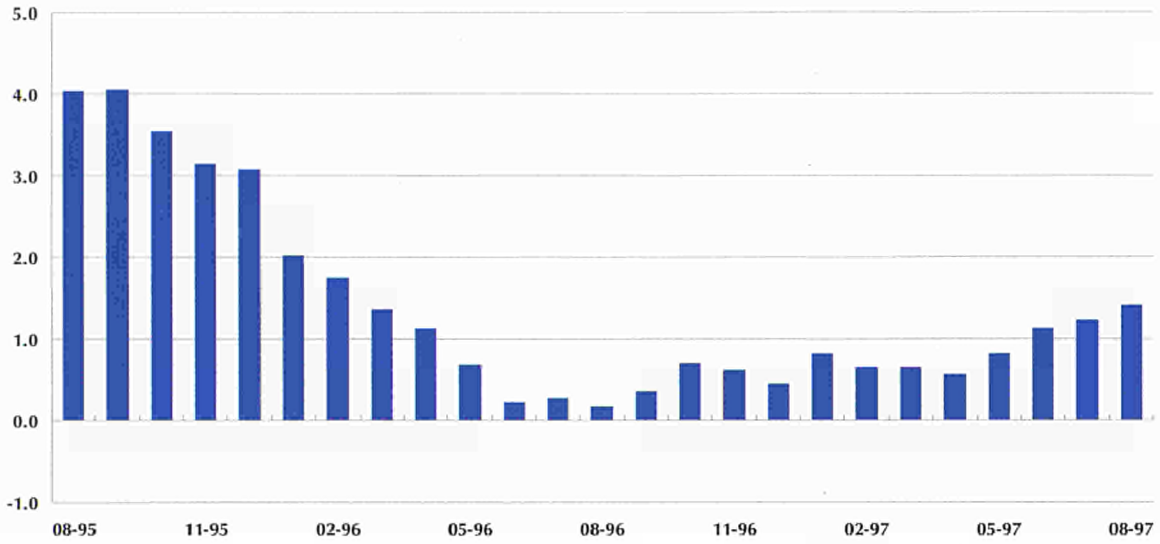
The index of production measures changes in volume (at constant prices) of gross value added created by a given activity, the activity indices being aggregated (like the aggregation at Community level) by means of a system of weighting according to gross value added at factor cost.
The indices of production 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, Finland, Sweden and the United Kingdom, the indices are adjusted by the national statistical offices themselves. For Germany, the trend and seasonally adjusted figures are calculated by the German NSO. 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

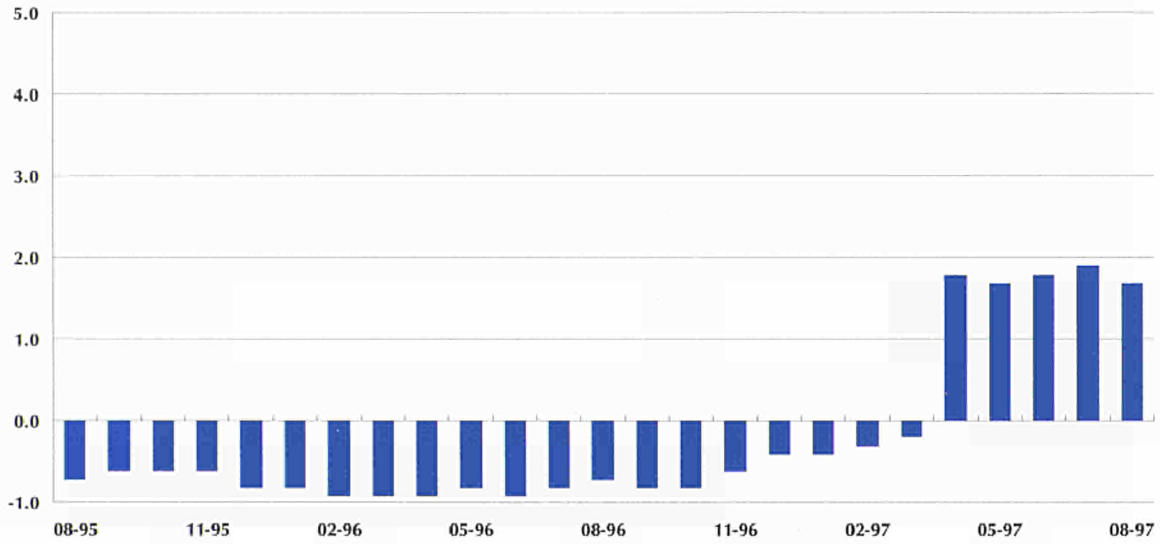
Figure 2.9

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

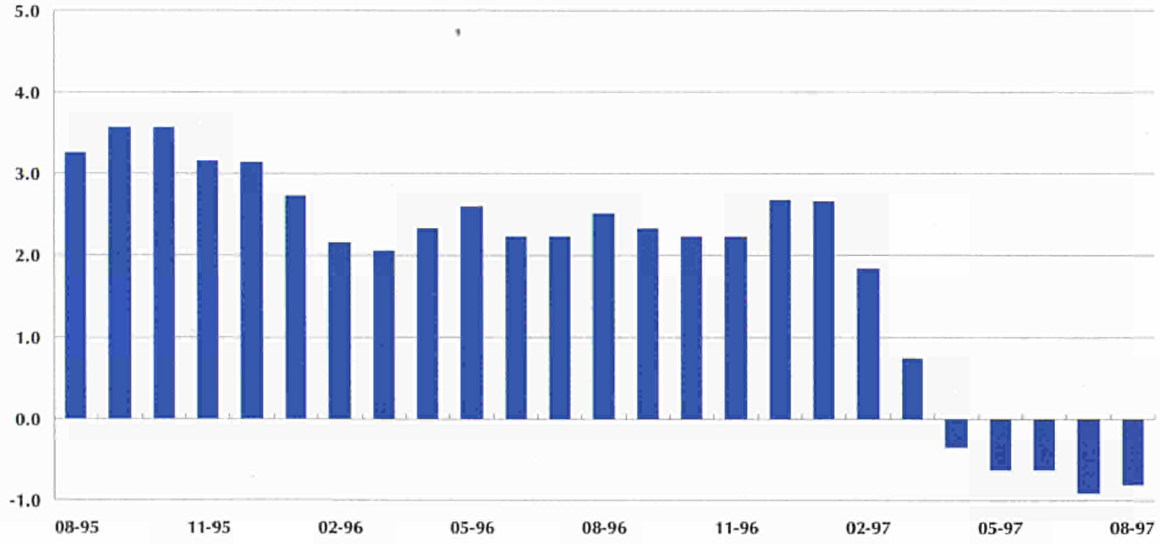
EUR15



Japan



USA

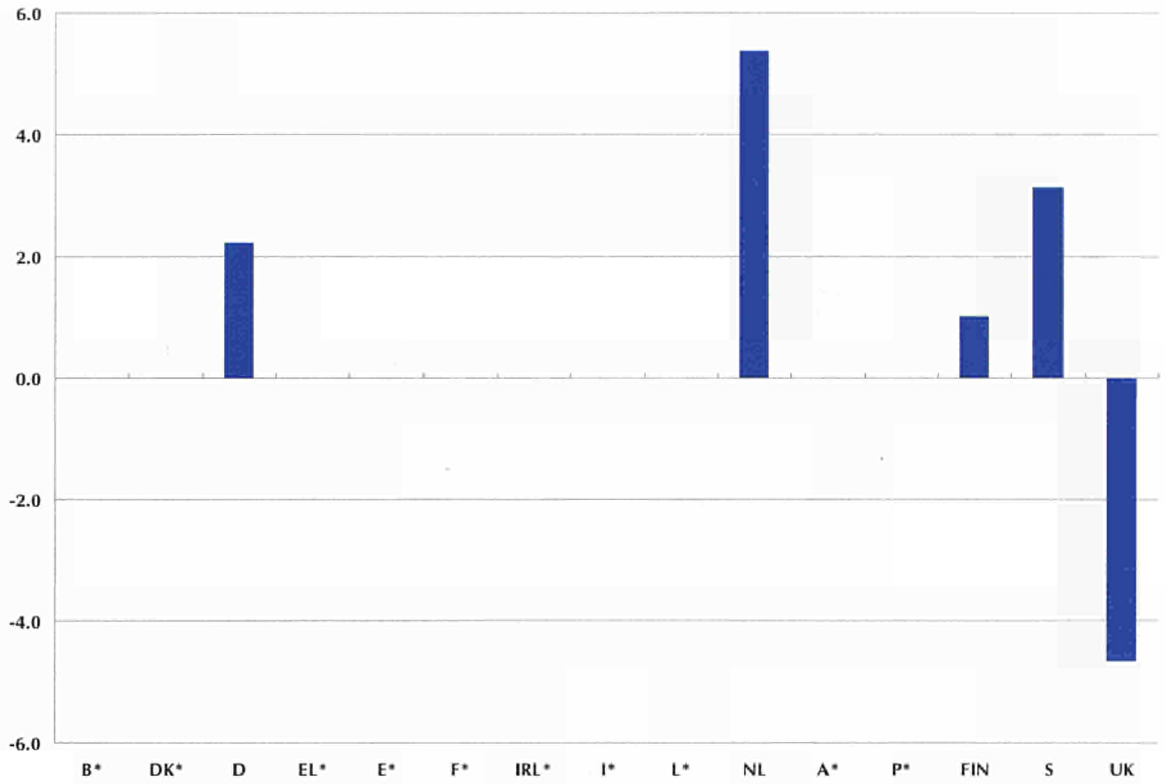


Source: eurostat

EXPORT PRICE INDEX AND DOMESTIC PRODUCER PRICE INDEX

Figure 2.10

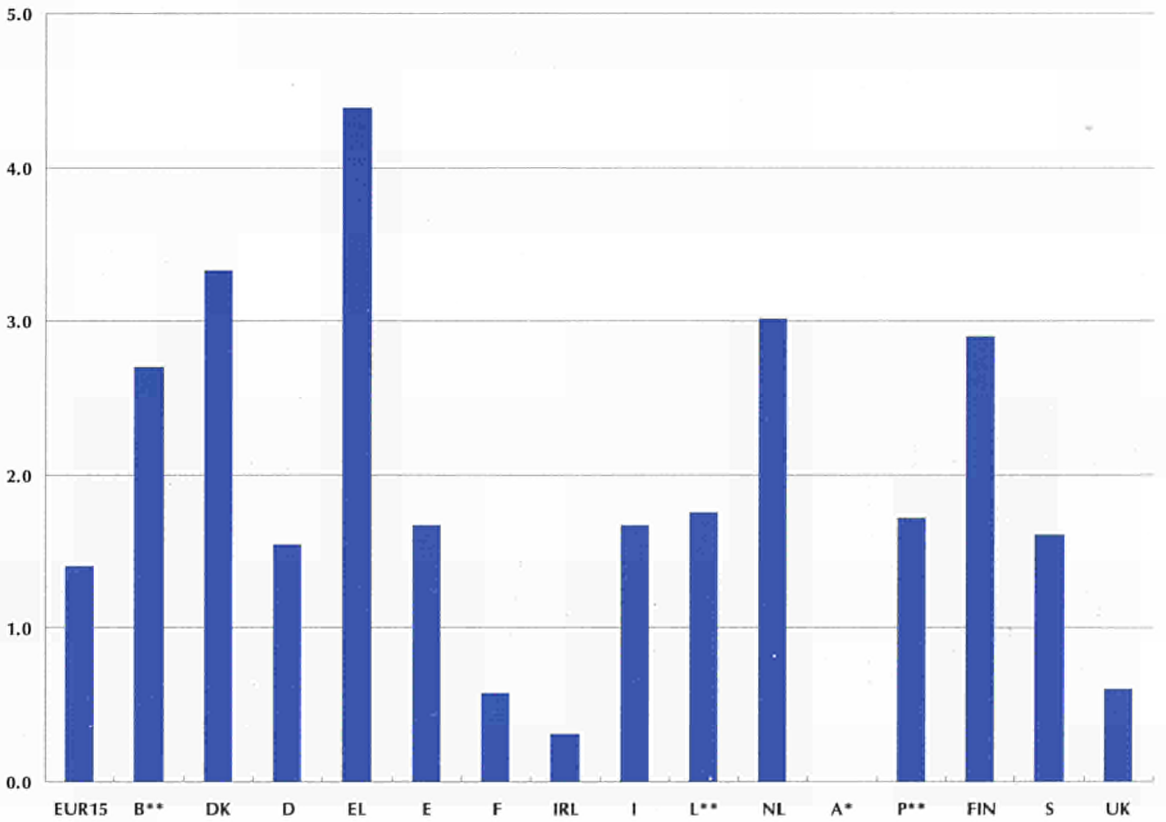
Annual growth rates of export prices for manufacturing industry, in national currency, Aug-97 (%)



Source: eurostat

Figure 2.11

Annual growth rates of the producer price index of total industry, in national currency, Aug-97 (%)



Source: eurostat

DOMESTIC PRODUCER PRICE INDEX

Table 2.8

	1994	1995	1996	03-97	04-97	05-97	06-97	07-97	08-97
EUR15	108.2	112.4	113.3	114.0	114.0	114.2	114.2	114.3	114.5
B	99.5	101.7	102.4	102.8	103.2	104.0	103.7	104.4	:
DK	99.7	103.4	105.1	105.6	107.6	108.8	108.0	107.7	108.5
D	104.7	106.5	106.0	106.6	106.9	107.1	107.2	107.3	107.5
EL	156.6	171.4	184.1	187.6	188.6	189.1	189.5	189.9	191.4
E	109.8	116.8	118.7	119.4	119.6	119.7	119.6	119.9	120.4
F	100.9	103.1	103.5	103.6	103.5	103.6	103.6	103.7	104.0
IRL	107.6	111.6	113.6	113.4	113.7	113.7	113.8	113.7	113.8
I	113.3	122.2	124.5	125.7	125.7	125.9	126.0	126.0	126.3
L	107.2	110.8	110.4	111.0	111.9	112.5	112.4	112.5	:
NL	101.0	104.0	105.8	107.7	108.5	109.0	108.6	108.6	109.3
A	:	:	:	:	:	:	:	:	:
P	112.3	116.6	120.2	121.3	120.9	121.9	121.4	121.9	:
FIN	105.8	107.7	107.6	108.3	108.4	108.7	109.1	109.3	109.9
S	108.6	117.3	118.0	118.4	118.6	119.7	119.8	119.8	119.9
UK	114.2	118.5	119.4	119.8	119.1	119.0	118.8	118.8	118.8
Japan	96.8	96.1	95.4	95.4	97.2	97.1	97.0	97.0	96.8
USA	103.6	107.3	109.8	109.5	109.2	109.5	109.4	109.1	109.4

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

Source: eurostat

Table 2.9

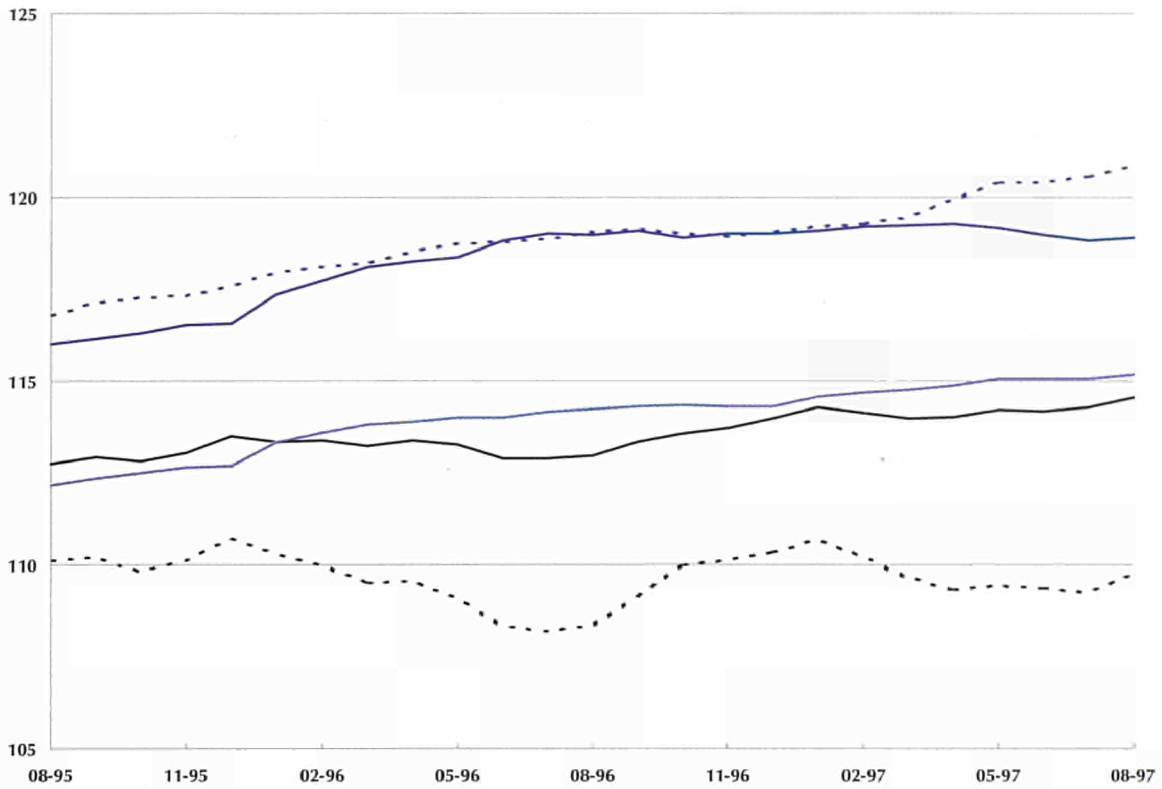
	1994	1995	1996	03-97	04-97	05-97	06-97	07-97	08-97
EUR15	102.4	104.2	106.5	108.4	108.6	108.8	109.0	109.5	109.7
B	106.4	112.0	110.5	108.3	108.3	109.2	108.6	108.4	:
DK	103.8	110.9	112.2	111.5	113.3	114.7	113.5	112.3	113.3
D	111.6	116.6	113.9	112.1	112.0	112.3	112.1	111.3	111.7
EL	109.6	114.0	121.5	123.2	122.7	122.1	122.8	123.3	124.7
E	89.4	92.8	95.6	93.4	93.6	93.7	93.3	92.9	93.4
F	106.0	109.2	110.3	108.9	108.5	108.5	108.1	107.4	108.0
IRL	104.2	105.0	110.0	118.4	118.2	114.9	115.8	118.3	118.3
I	90.1	87.3	96.8	98.2	98.7	99.1	99.5	99.5	99.7
L	114.7	121.9	119.2	117.0	117.5	118.1	117.7	116.8	:
NL	108.1	114.5	114.3	113.4	113.9	114.5	113.7	112.7	113.6
A	:	:	:	:	:	:	:	:	:
P	103.3	107.7	111.2	112.1	111.4	111.9	110.9	110.5	:
FIN	83.1	91.6	89.6	90.2	89.6	89.4	90.0	90.5	90.4
S	89.2	94.7	104.3	101.1	101.4	102.1	102.3	104.4	105.3
UK	105.1	102.1	104.9	119.4	121.0	120.8	122.6	128.3	126.7
Japan	146.5	144.2	126.9	124.2	124.1	130.8	137.1	140.0	140.5
USA	110.9	104.2	109.9	121.0	121.2	121.1	122.3	125.5	129.6

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

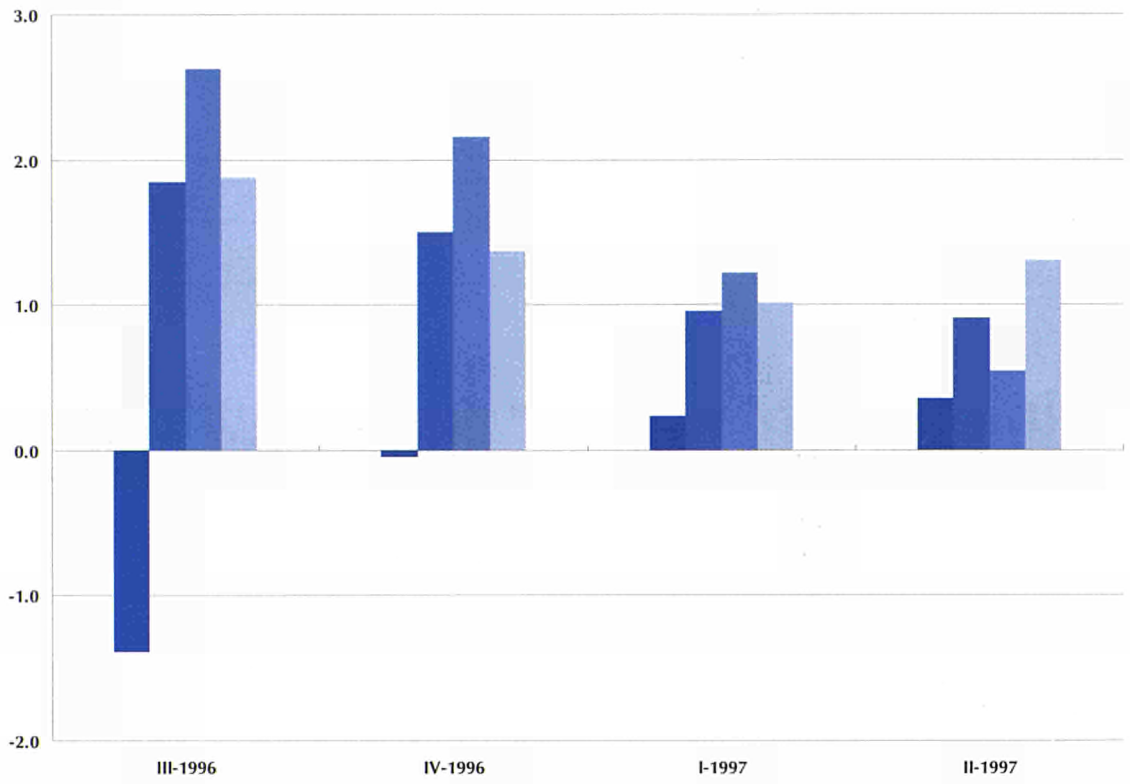
TRIAD comparison of indices of producer prices for the main industrial groupings, in national currency (1990 = 100)

	1994	1995	1996	03-97	04-97	05-97	06-97	07-97	08-97
Total industry									
EUR15	108.2	112.4	113.3	114.0	114.0	114.2	114.2	114.3	114.5
Japan	96.8	96.1	95.4	95.4	97.2	97.1	97.0	97.0	96.8
USA	103.6	107.3	109.8	109.5	109.2	109.5	109.4	109.1	109.4
Intermediate goods									
EUR15	104.9	109.9	109.4	109.7	109.3	109.4	109.4	109.3	109.8
Japan	:	:	:	:	:	:	:	:	:
USA	:	:	:	:	:	:	:	:	:
Capital goods									
EUR15	109.0	111.8	114.0	114.8	114.9	115.1	115.1	115.1	115.2
Japan	:	:	:	:	:	:	:	:	:
USA	:	:	:	:	:	:	:	:	:
Consumer durables									
EUR15	112.7	115.6	118.6	119.2	119.3	119.2	119.0	118.9	118.9
Japan	:	:	:	:	:	:	:	:	:
USA	:	:	:	:	:	:	:	:	:
Consumer non-durables									
EUR15	112.9	116.4	118.7	119.5	119.9	120.4	120.4	120.6	120.9
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

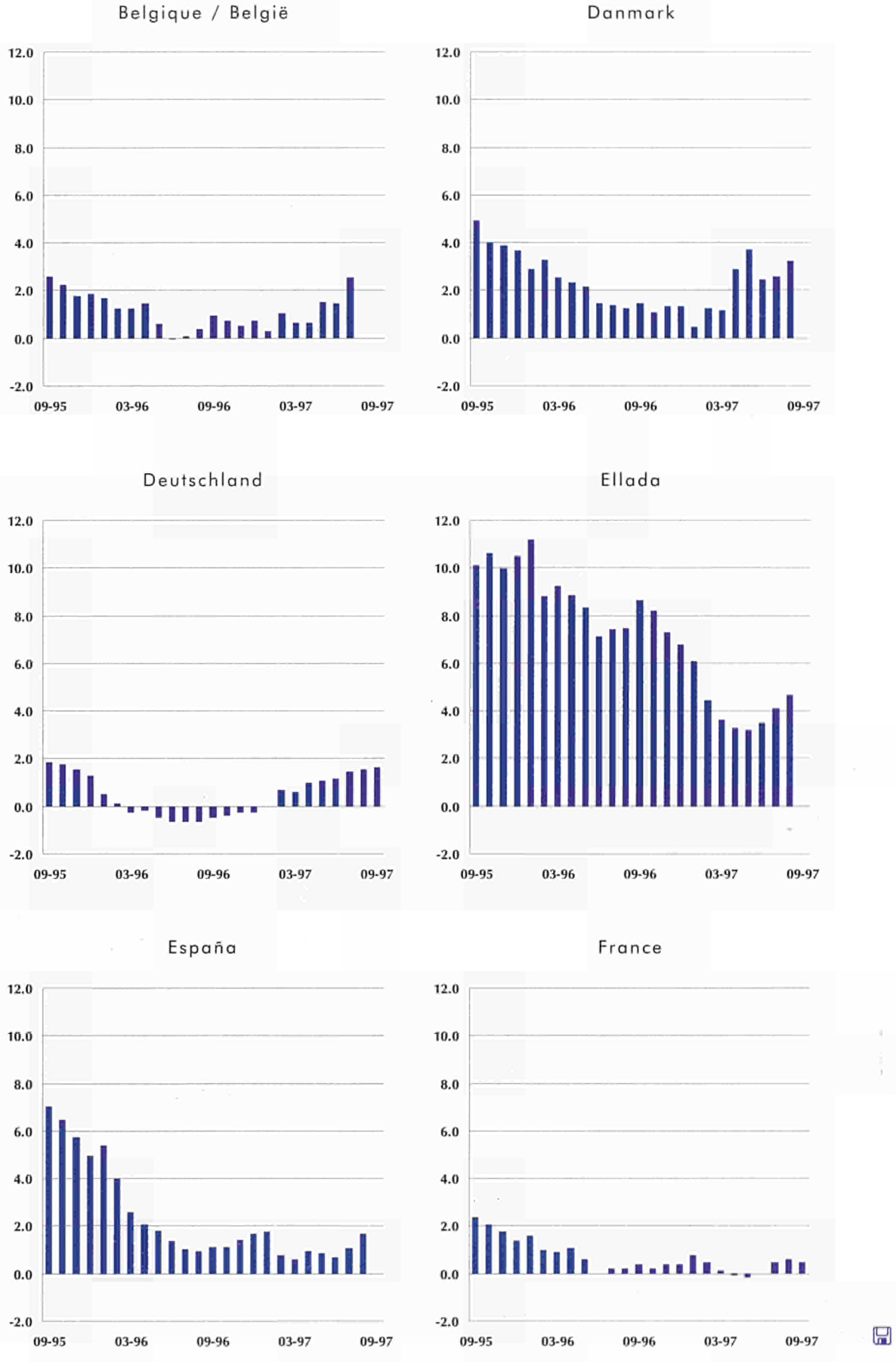
	Latest month available	Total industry	Intermediate goods	Capital goods	Consumer durables	Consumer non-durables
EUR15	08-97	1.4	1.3	0.8	-0.1	1.5
B	07-97	2.7	3.1	-0.1	:	3.0
DK	08-97	3.3	2.1	5.4	0.8	3.9
D	09-97	1.4	1.9	0.8	0.3	1.4
EL	08-97	4.4	5.4	7.3	6.7	2.5
E	08-97	1.7	2.9	1.1	0.5	0.9
F	09-97	0.1	-0.4	-1.2	-1.1	1.7
IRL	08-97	0.3	:	:	:	0.3
I	08-97	1.7	2.2	1.2	-1.7	1.4
L	07-97	2.0	2.4	1.7	0.0	2.6
NL	08-97	3.0	3.5	0.9	0.9	3.5
A		:	:	:	:	:
P	07-97	1.3	1.5	:	:	1.0
FIN	09-97	2.6	3.3	0.4	2.1	2.2
S	09-97	1.7	0.6	1.4	1.2	2.9
UK	08-97	0.6	-1.9	1.1	0.2	1.4
Japan	08-97	1.7	:	:	:	:
USA	08-97	-0.8	:	:	:	:

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 (%)



Source: eurostat

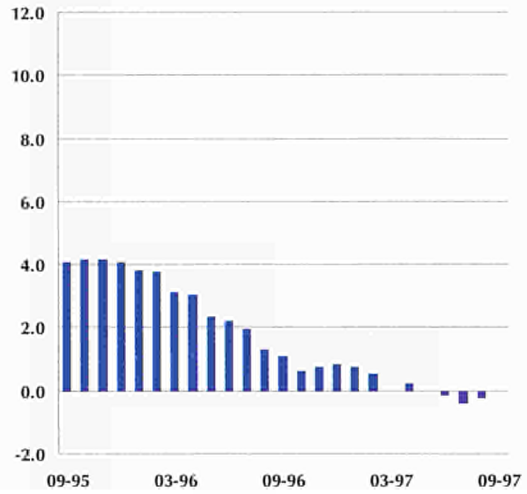
eurostat

DOMESTIC PRODUCER PRICE INDEX

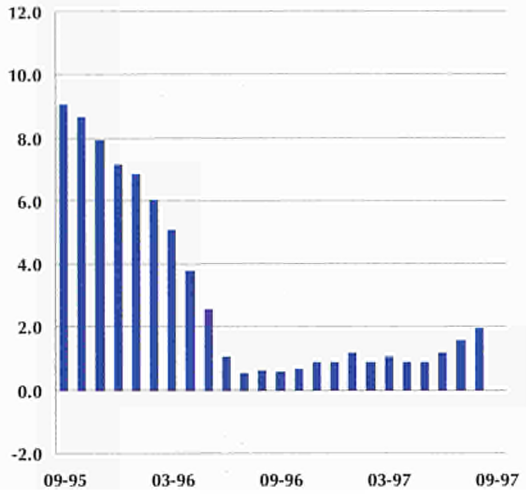
Figure 2.14

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

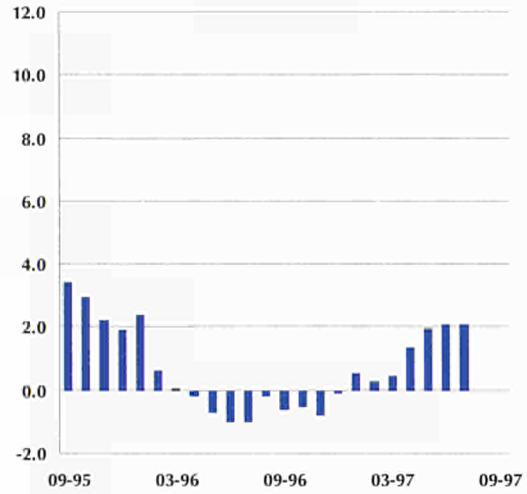
Ireland



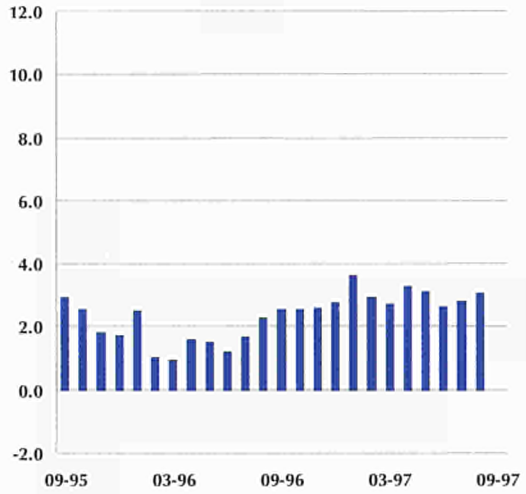
Italia



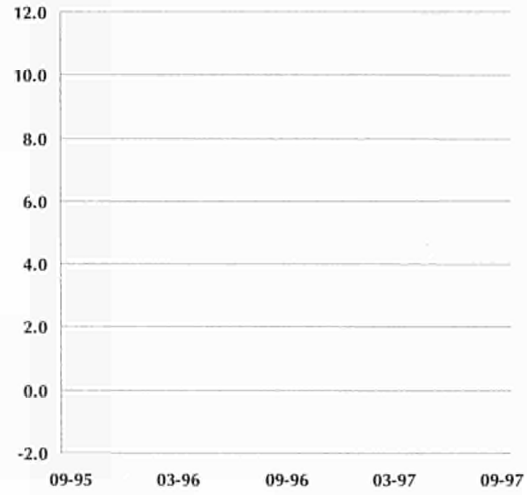
Luxembourg



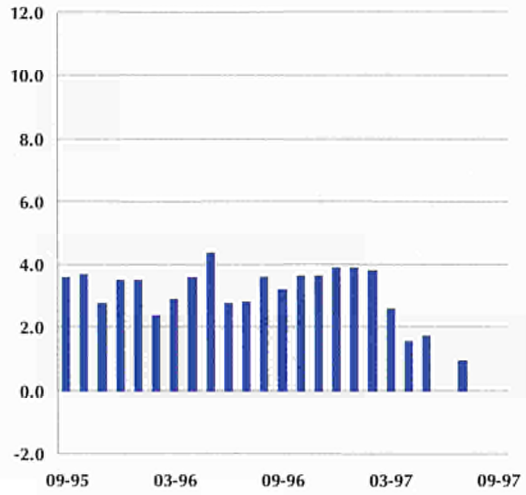
Nederland



Österreich



Portugal

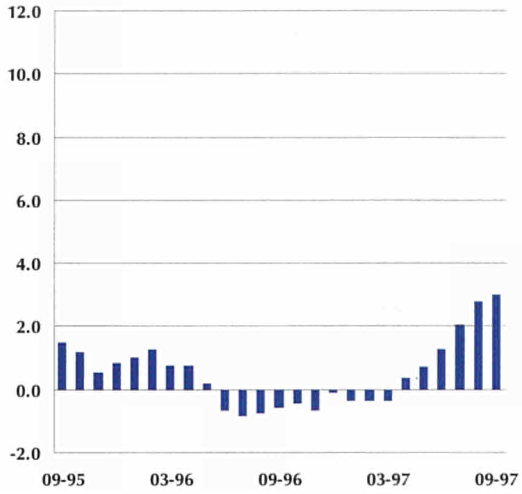


Source: eurostat

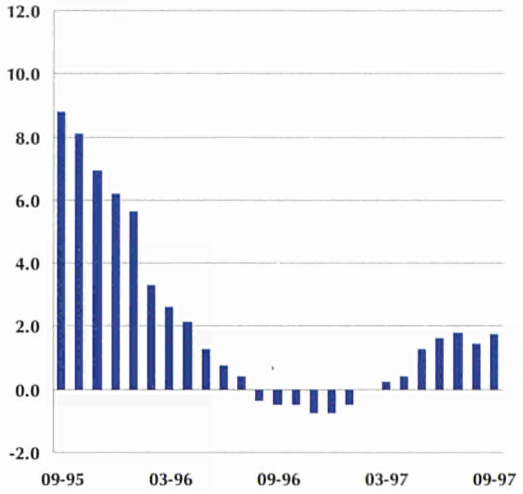
Figure 2.14

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

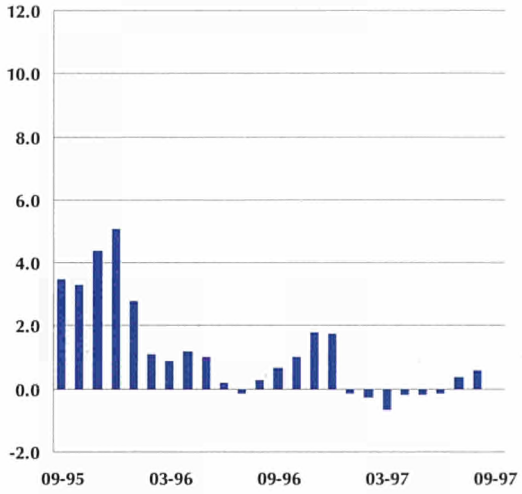
Suomi / Finland



Sverige



United Kingdom



Further information - price indices:

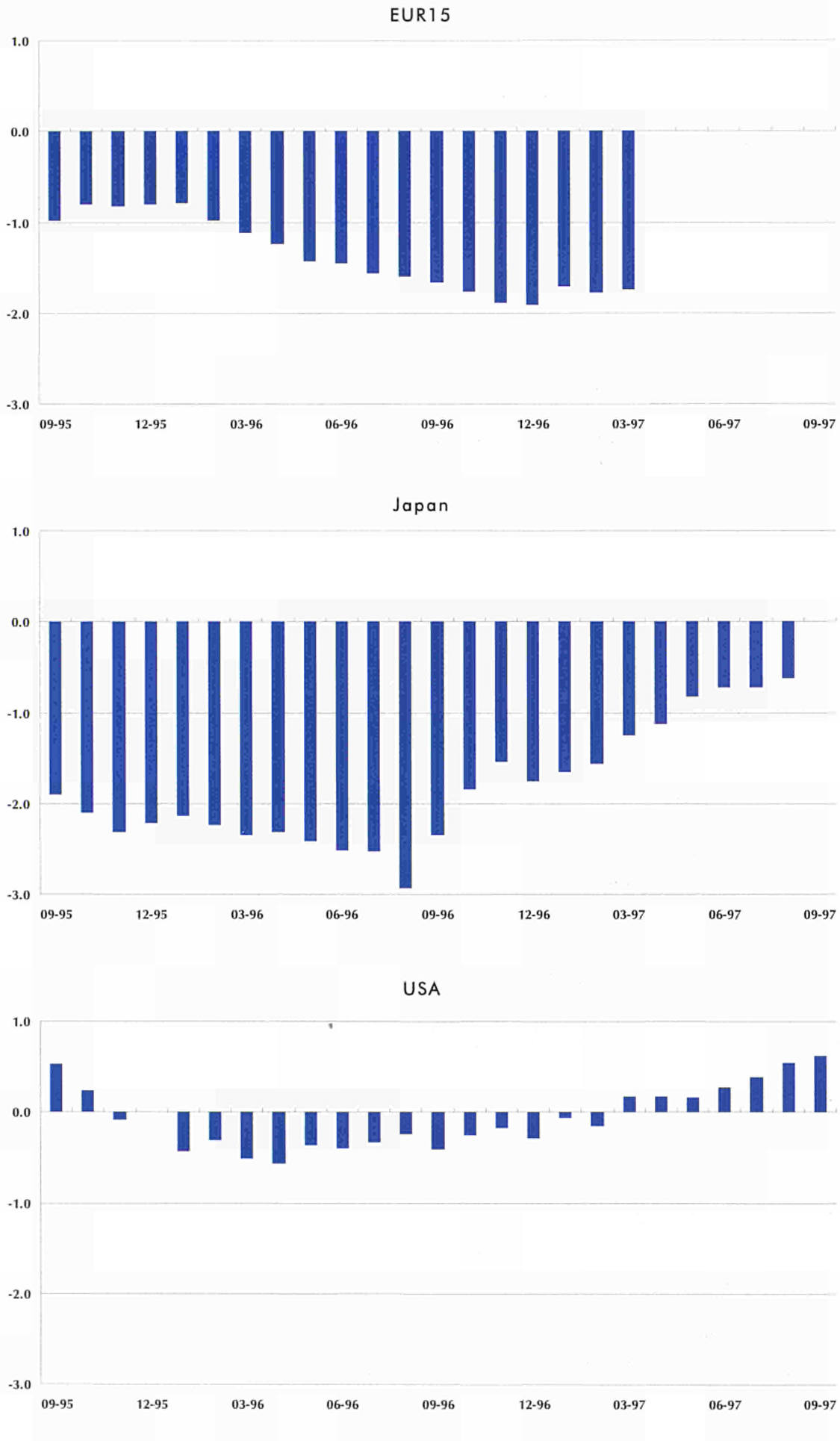
The index of producer prices shows (in the national currency of the Member State in question) changes in the ex-works selling prices of all products sold on the domestic market. Since we deal with producer prices, imports are not included in these price indices. The Community indices (EUR13, since there 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

EMPLOYMENT INDEX - GROSS DATA

Figure 2.15

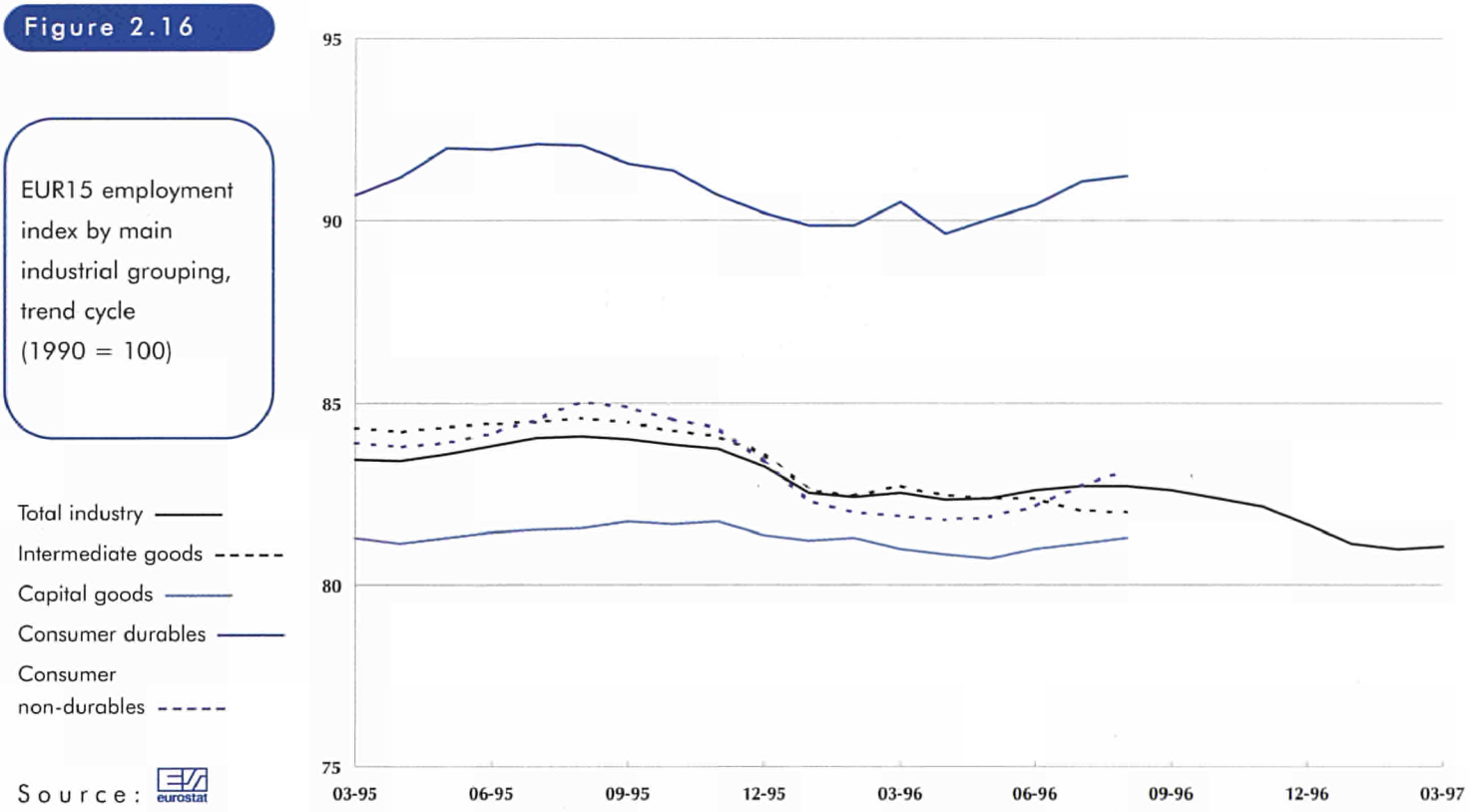
TRIAD comparison of annual growth rates of employment for total industry, gross data (%)



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 (%)

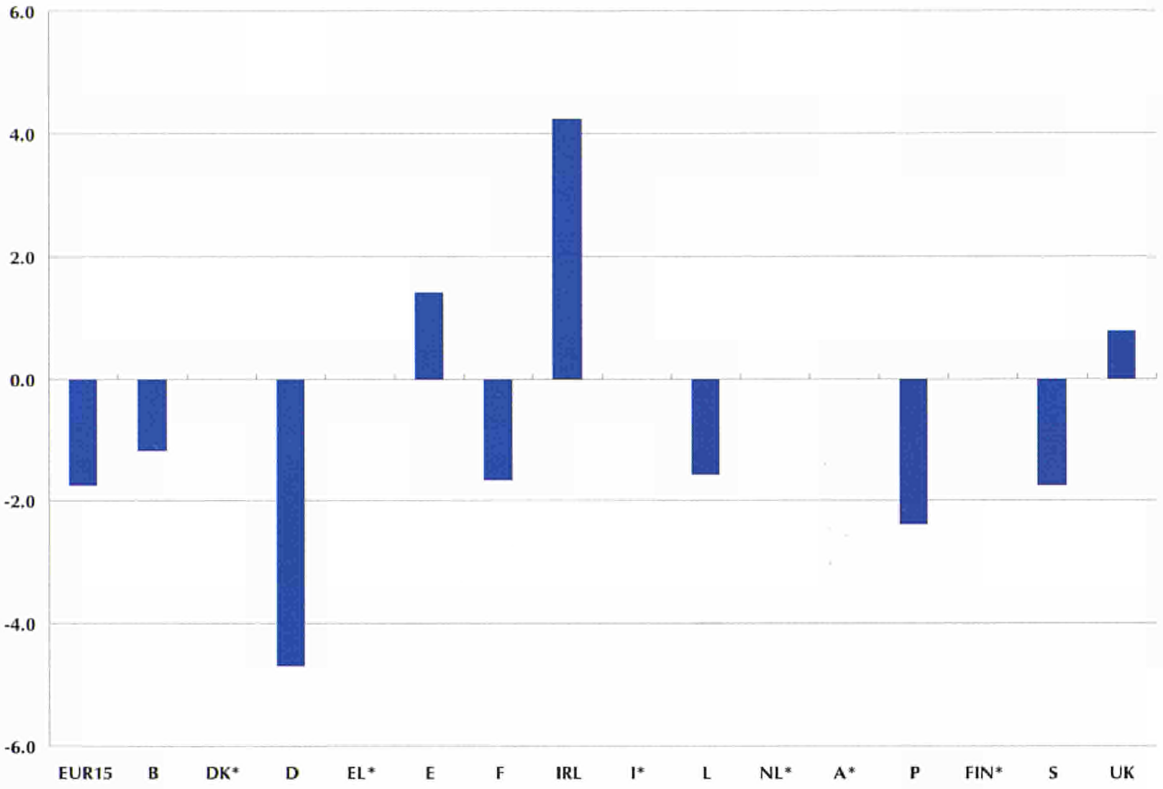
	Latest 3 months available			Total industry	Intermediate goods	Capital goods	Consumer durables	Consumer non-durables
EUR15	01-97	⇨	03-97	-0.4	:	:	:	:
B	05-97	⇨	07-97	-0.1	0.1	-0.1	:	:
DK		⇨		:	:	:	:	:
D	06-97	⇨	08-97	-0.6	-0.5	-0.6	-1.2	-1.2
EL	10-96	⇨	12-96	-0.5	-0.4	-1.5	-2.2	-1.2
E	04-97	⇨	06-97	1.0	0.7	1.1	1.0	0.8
F	04-97	⇨	06-97	-0.2	-0.2	-0.1	-0.7	-0.1
IRL	01-97	⇨	03-97	2.0	1.3	3.7	:	:
I	06-96	⇨	08-96	-0.5	-1.1	-0.4	0.4	-0.9
L	05-97	⇨	07-97	0.3	-0.1	1.1	-3.6	0.5
NL	07-96	⇨	09-96	-1.7	:	:	:	:
A	12-96	⇨	02-97	-0.9	-1.3	0.1	-1.0	-2.0
P	05-97	⇨	07-97	-0.6	0.2	0.2	0.9	-0.7
FIN	04-96	⇨	06-96	0.2	:	:	:	:
S	04-97	⇨	06-97	0.6	:	:	:	:
UK	06-97	⇨	08-97	0.1	-0.4	0.5	-0.4	-0.6
Japan	06-97	⇨	08-97	-0.1	:	:	:	:
USA	07-97	⇨	09-97	0.2	:	:	:	:

Source: eurostat

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, Jan-97 to Mar-97 (%)

Source: eurostat

Table 2.13

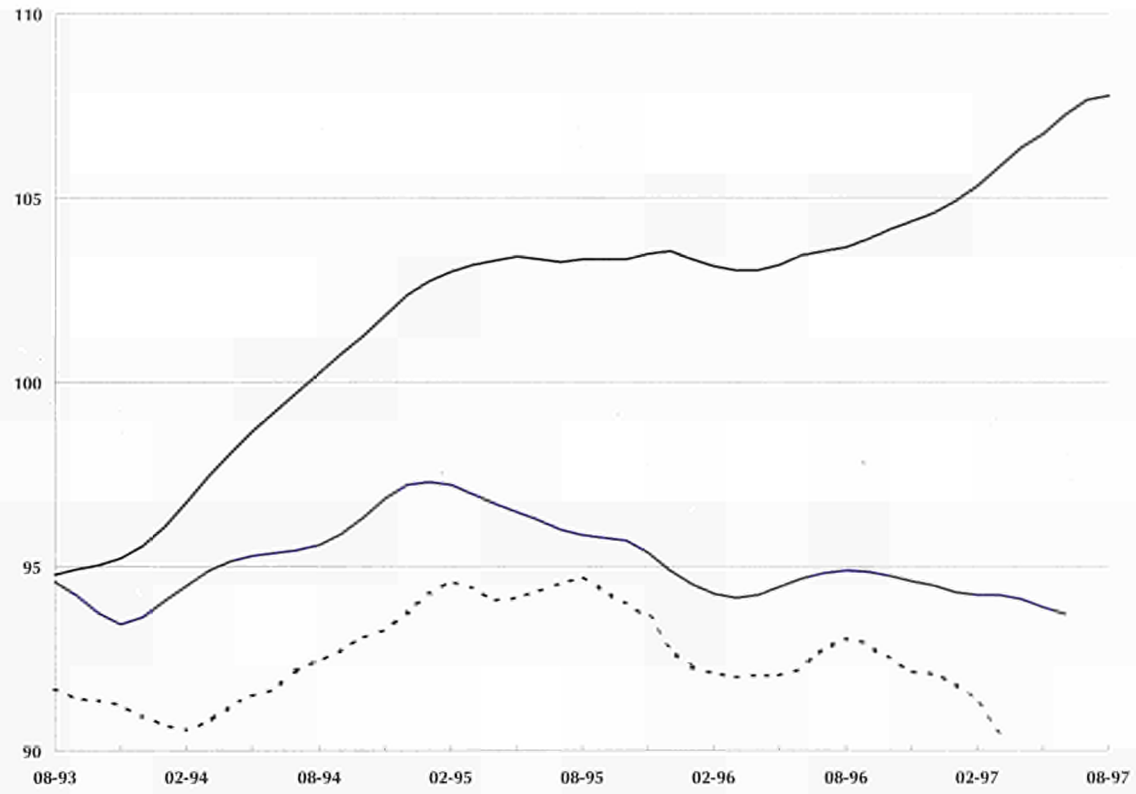
	Latest 3 months available			Total industry	Intermediate goods	Capital goods	Consumer durables	Consumer non-durables
EUR15	01-97	⇨	03-97	-1.7	:	:	:	:
B	05-97	⇨	07-97	-0.9	-0.7	0.1	:	:
DK		⇨		:	:	:	:	:
D	06-97	⇨	08-97	-3.4	-3.9	-3.6	-5.4	-4.4
EL	10-96	⇨	12-96	-3.6	-1.2	-6.7	0.5	-6.3
E	04-97	⇨	06-97	2.7	-0.9	6.7	6.9	1.6
F	04-97	⇨	06-97	-1.3	-1.6	-0.5	-2.6	-1.4
IRL	01-97	⇨	03-97	4.3	5.1	5.0	:	:
I	06-96	⇨	08-96	-1.9	-4.3	-2.0	1.3	-3.7
L	05-97	⇨	07-97	-0.8	-2.3	2.1	-6.1	1.0
NL	07-96	⇨	09-96	-0.4	:	:	:	:
A	12-96	⇨	02-97	-2.8	-3.2	-1.5	-3.4	-3.6
P	05-97	⇨	07-97	-2.6	-0.8	-0.8	-0.8	-4.8
FIN	04-96	⇨	06-96	1.1	:	:	:	:
S	04-97	⇨	06-97	-0.8	:	:	:	:
UK	06-97	⇨	08-97	0.5	0.0	1.3	0.1	0.3
Japan	06-97	⇨	08-97	-0.7	:	:	:	:
USA	07-97	⇨	09-97	0.5	:	:	:	:

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 ——

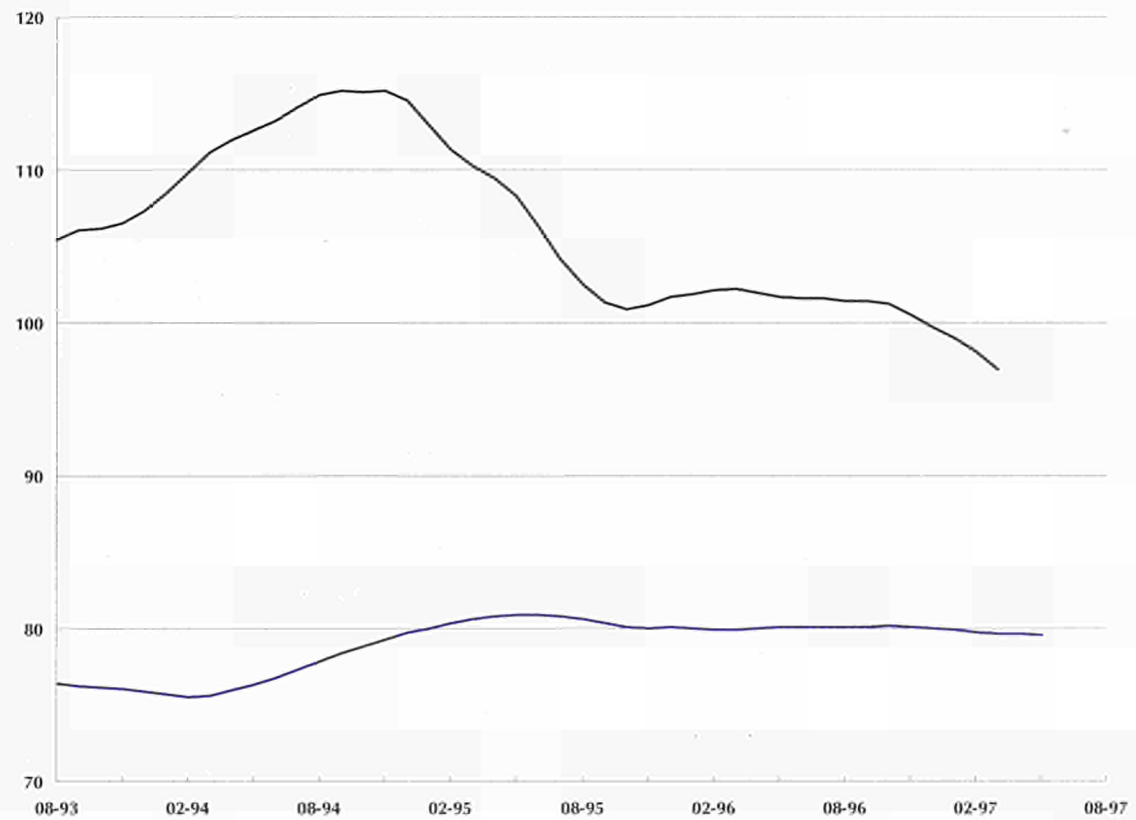
Construction: production index ——

Construction: employment index - - - - -

Source: eurostat

Figure 2.19

EUR15 building permits, trend cycle (1990 = 100)



Residential ——

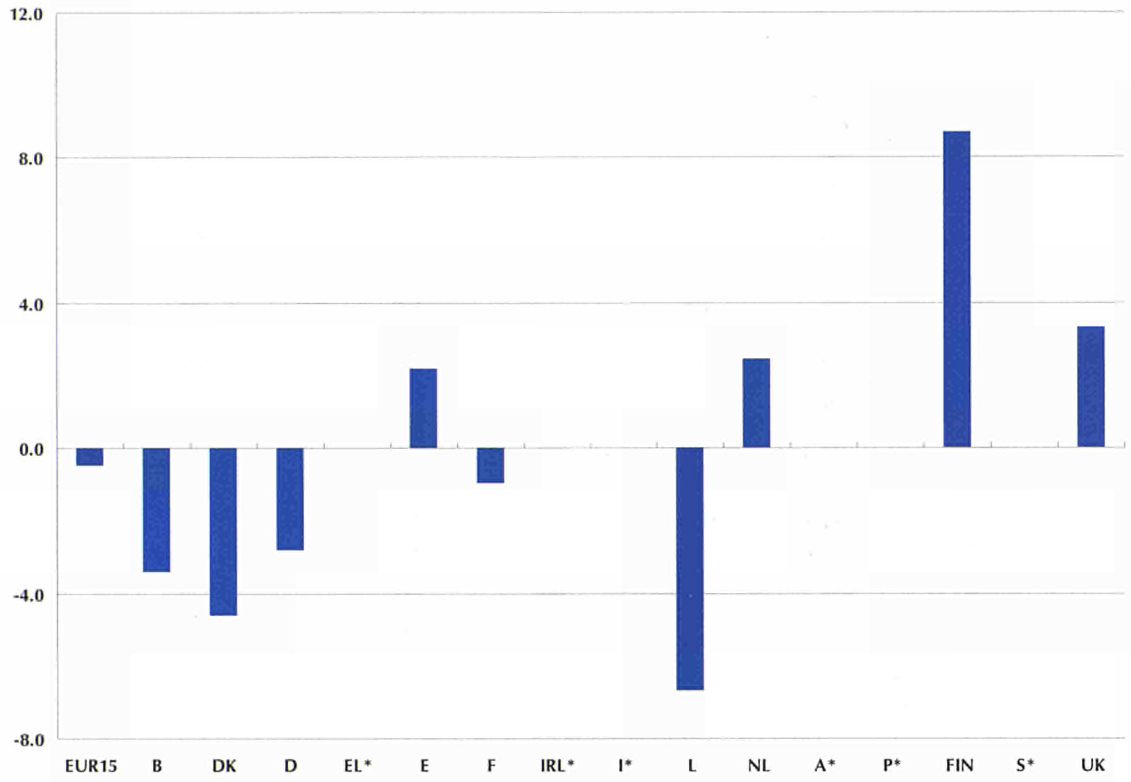
Non-residential ——

Source: eurostat

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., Apr-97 to June-97 (%)

Source: eurostat

Table 2.14

	Latest 3 months available			Building t / t-1	Building t / t-4	Latest 3 months available			Civil engineering t / t-1	Civil engineering t / t-4
EUR15	01-97	⇨	03-97	-0.5	4.7	04-97	⇨	06-97	-1.2	-1.5
B		⇨		:	:		⇨		:	:
DK	04-97	⇨	06-97	-5.2	-3.3	04-97	⇨	06-97	-4.8	-6.8
D	07-97	⇨	09-97	-0.3	-3.1	07-97	⇨	09-97	-0.8	-3.5
EL		⇨		:	:		⇨		:	:
E	04-97	⇨	06-97	0.7	3.6	04-97	⇨	06-97	3.7	0.0
F	06-97	⇨	08-97	-0.7	-1.6	06-97	⇨	08-97	-0.2	-1.2
IRL		⇨		:	:		⇨		:	:
I	04-97	⇨	06-97	-6.7	-11.4	10-96	⇨	12-96	6.3	:
L	05-97	⇨	07-97	-4.4	-15.4	05-97	⇨	07-97	-0.1	-1.1
NL	01-97	⇨	03-97	8.2	25.4		⇨		:	:
A		⇨		:	:		⇨		:	:
P		⇨		:	:		⇨		:	:
FIN	04-97	⇨	06-97	0.9	14.2	04-97	⇨	06-97	0.4	-2.9
S		⇨		:	:		⇨		:	:
UK		⇨		:	:		⇨		:	:

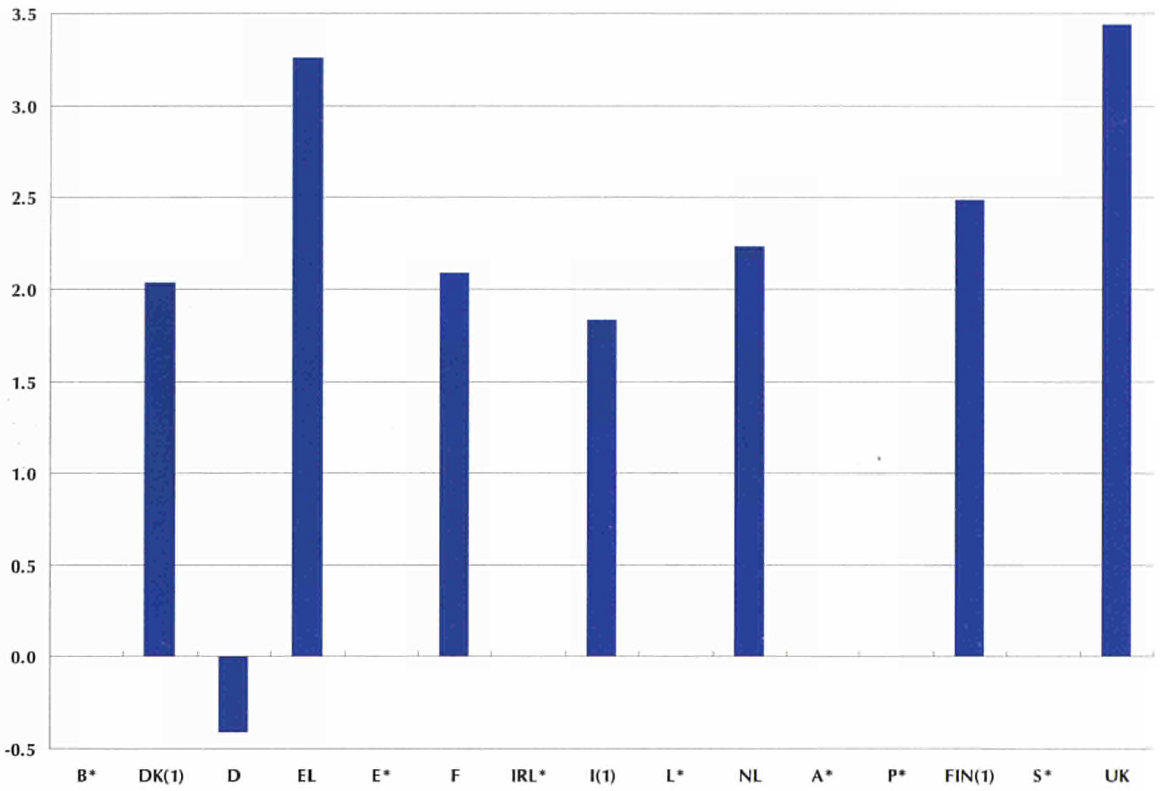
Latest growth rates for the production index of building and civil engineering (%)

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, Apr-97 to June-97 (%)



1) input prices

Source: eurostat

Table 2.15

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

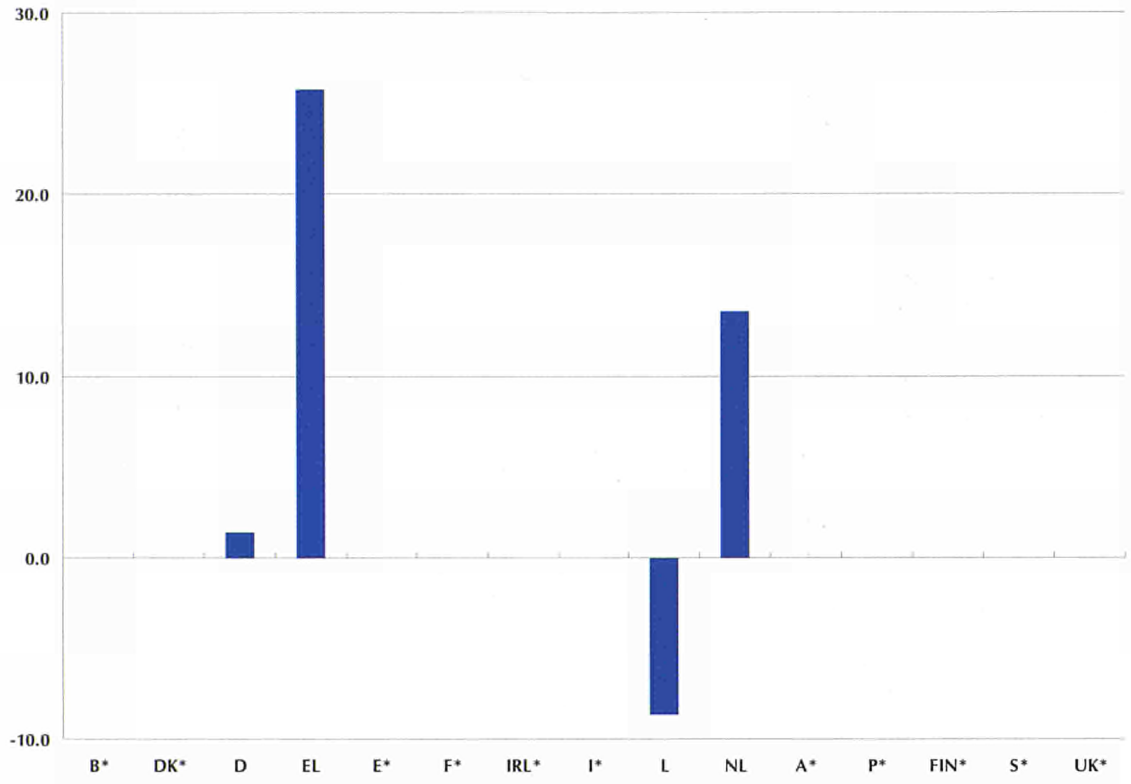
	IV-1995	I-1996	II-1996	III-1996	IV-1996	I-1997	II-1997	III-1997
EUR15	:	:	:	:	:	:	:	:
B	:	:	:	:	:	:	:	:
DK (1)	116.8	117.6	118.5	119.3	120.2	121.0	121.8	122.7
D	124.5	124.2	124.2	124.1	123.8	123.6	123.5	123.5
EL	165.9	170.3	171.7	172.8	174.7	179.0	180.0	:
E	:	:	:	:	:	:	:	:
F	106.7	109.3	108.4	108.5	110.2	110.3	111.6	:
IRL (3)	117.5	117.4	117.5	117.9	118.8	120.1	:	:
I (1)	123.9	123.9	124.2	126.3	127.0	127.3	127.5	:
L	117.7	118.0	118.0	118.4	:	:	:	:
NL	119.0	121.0	121.0	121.0	122.0	124.0	125.0	:
A	120.5	121.2	121.8	122.1	:	:	:	:
P	:	:	:	:	:	:	:	:
FIN (1)	102.0	100.8	101.5	102.2	102.7	103.8	104.9	106.2
S (2)	87.6	91.5	94.0	110.6	99.5	:	:	:
UK	102.4	102.5	102.9	104.0	105.0	107.0	108.0	:

1) input prices
2) one-dwelling buildings
3) input prices & one-dwelling buildings

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, May-97 to July-97 (%)

Source: eurostat

Table 2.16

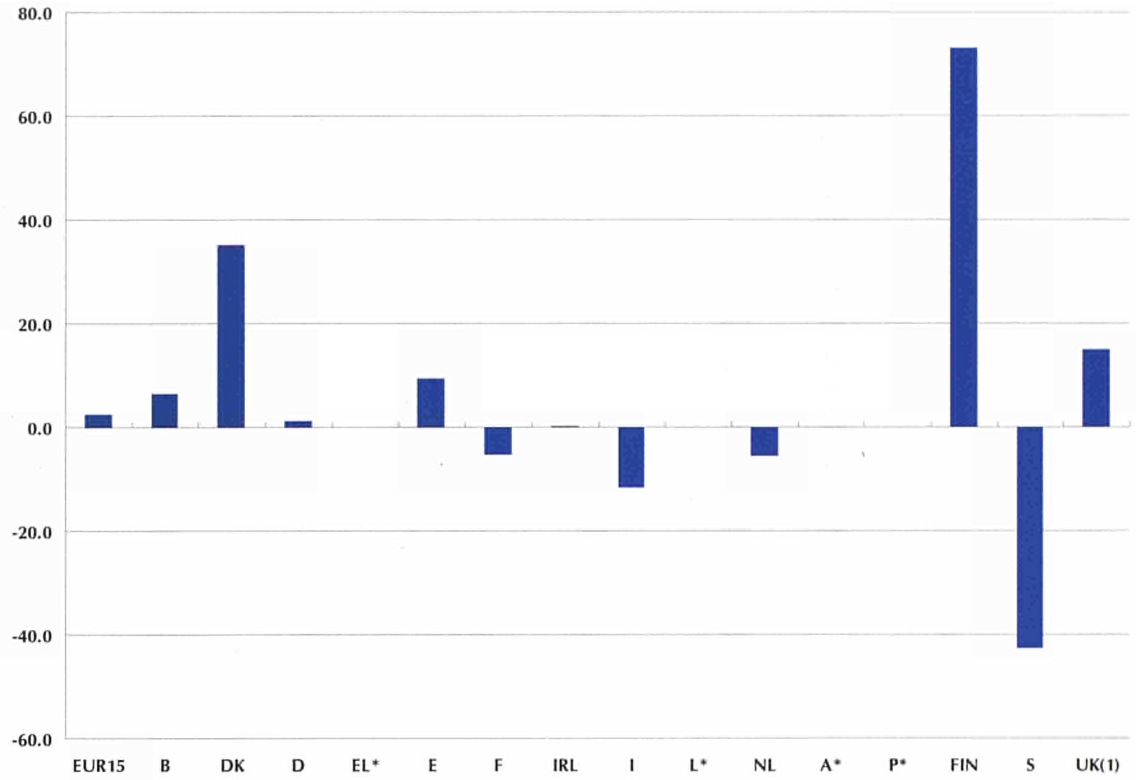
	Latest 3 months available			Residential '000m² 1990=100		Latest 3 months available			Non-residential '000m² 1990=100	
EUR15		⇨		:	:	03-97	⇨	05-97	:	80.7
B	03-97	⇨	05-97	2,100	82.7	03-97	⇨	05-97	1,370	54.0
DK	04-97	⇨	06-97	696	169.0	04-97	⇨	06-97	1,360	107.7
D	06-97	⇨	08-97	13,411	146.4	06-97	⇨	08-97	11,044	115.7
EL	10-95	⇨	12-95	2,288	62.9	10-95	⇨	12-95	1,028	76.6
E	03-97	⇨	05-97	10,893	107.5	03-97	⇨	05-97	2,304	75.3
F		⇨		:	:	04-97	⇨	06-97	8,579	65.5
IRL	04-97	⇨	06-97	1,424	188.2	04-97	⇨	06-97	852	119.1
I	01-97	⇨	03-97	2,663	55.7	01-97	⇨	03-97	3,409	47.2
L	05-97	⇨	07-97	:	91.3	05-97	⇨	07-97	:	99.1
NL	06-97	⇨	08-97	4,196	127.5	06-97	⇨	08-97	5,849	117.8
A		⇨		:	:		⇨		:	:
P		⇨		:	:		⇨		:	:
FIN	02-97	⇨	04-97	838	60.9	02-97	⇨	04-97	747	50.1
S	06-97	⇨	08-97	239	:	06-97	⇨	08-97	411	:
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, Jan-97 to Mar-97 (%)



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		:	03-97	:	:	96.5
B	1996	48,707	05-97	3,335	0.33	76.6
DK	1996	**15,809**	06-97	**1,910**	**0.37**	**119.9**
D	1996	576,376	08-97	42,153	0.52	127.5
EL	1995	70,865	12-95	6,326	0.61	63.1
E	1996	265,956	05-97	22,897	0.58	117.7
F	1996	304,186	07-97	26,700	0.46	83.4
IRL	1996	34,864	06-97	3,738	1.04	203.2
I	1996	**160,553**	03-97	**10,560**	**0.18**	**60.2**
L	1996	2,797	02-97	204	0.50	64.5
NL	1996	102,119	08-97	7,028	0.46	94.0
A		:		:	:	:
P	1996	84,609	06-97	7,822	0.79	:
FIN	1996	24,211	04-97	3,582	0.70	74.5
S	1996	12,824	08-97	693	0.08	11.9
UK (1)	1996	173,300	08-97	14,900	0.25	109.0

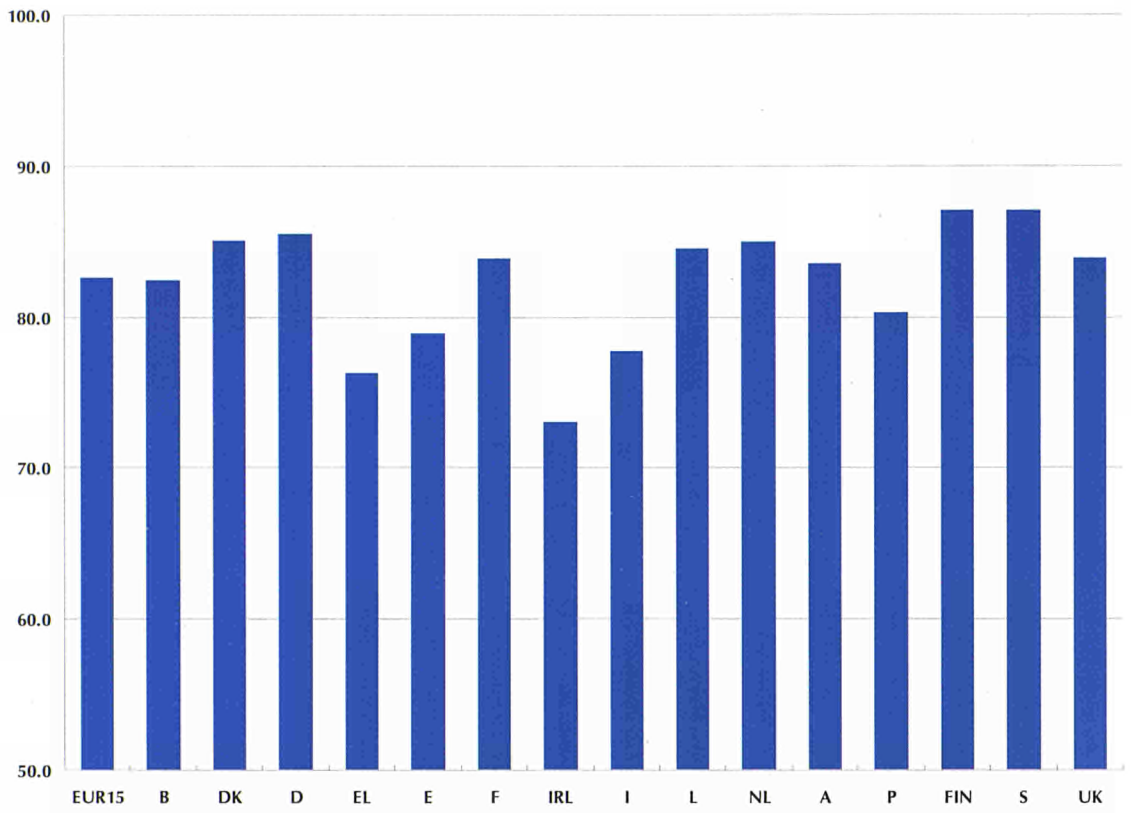
1) buildings starts

Source: eurostat

eurostat

CAPACITY UTILISATION RATES

Figure 2.24



Capacity utilisation rates for total industry, July-97 (%)

Source: DG II, Business Survey

Table 2.18

Growth rate: latest month, t / t-12 (%)		10-96	01-97	04-97	07-97
EUR15	1.9	81.2	80.8	81.7	82.6
B	3.4	80.3	80.3	80.3	82.4
DK	3.7	82.0	82.0	82.0	85.0
D	3.5	82.8	82.4	84.6	85.5
EL	1.6	77.2	75.2	72.1	76.3
E	2.3	77.6	77.1	77.3	78.9
F	0.5	83.0	83.4	82.8	83.8
IRL	-4.3	75.8	76.9	80.5	73.0
I	2.5	75.6	75.1	76.2	77.7
L	7.0	77.6	79.0	82.7	84.5
NL	0.8	84.4	83.8	83.8	84.9
A	3.6	81.4	79.8	80.7	83.5
P	2.6	76.6	81.4	80.3	80.2
FIN	4.8	85.0	85.7	86.9	87.0
S	2.4	85.0	87.0	84.0	87.0
UK	1.7	83.0	82.8	83.5	83.8

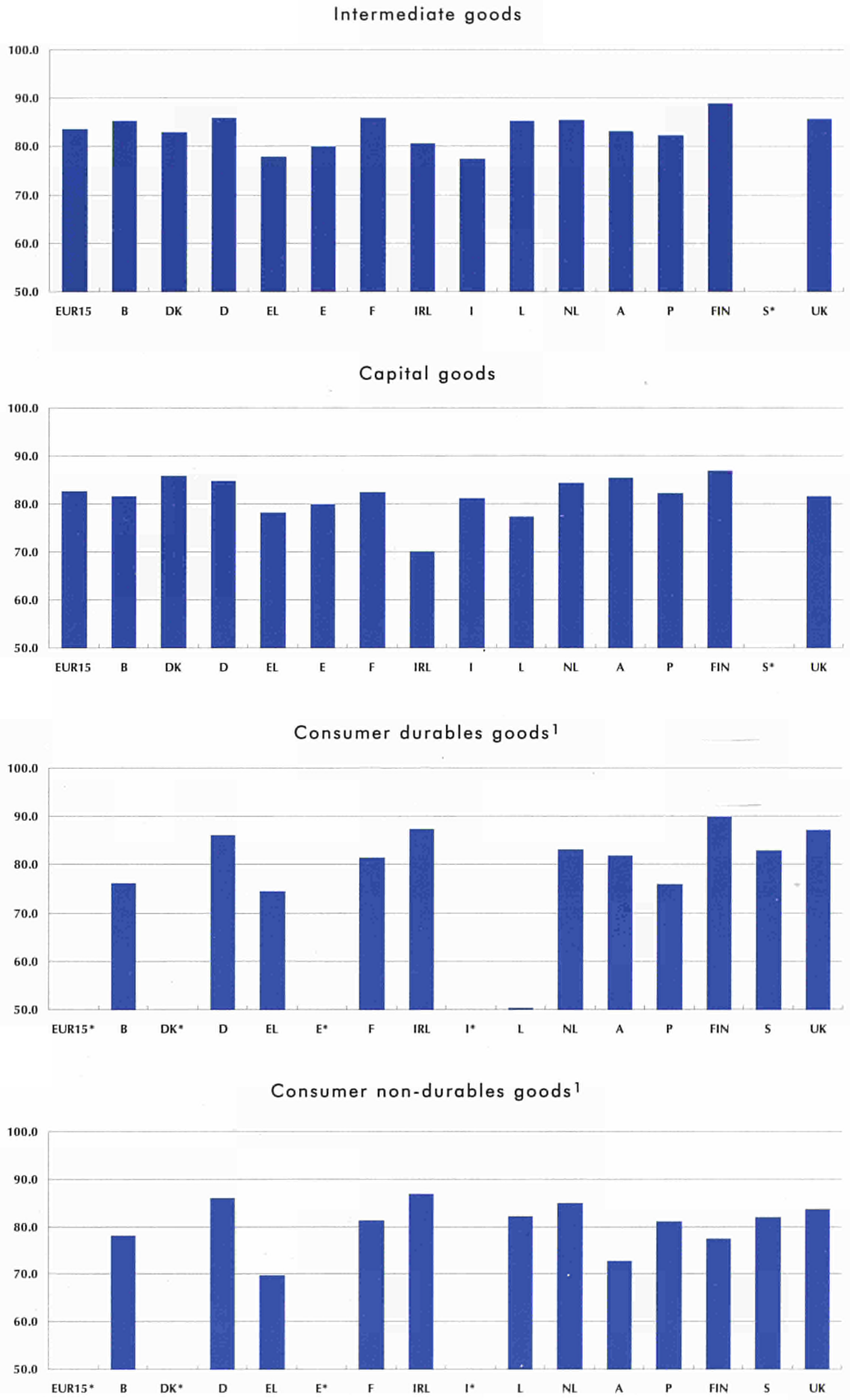
Capacity utilisation rates for total industry (%)

Source: DG II, Business Survey

CAPACITY UTILISATION RATES

Figure 2.25

Capacity utilisation rates for the main industrial groupings, July-97
(%)



1) Apr-97

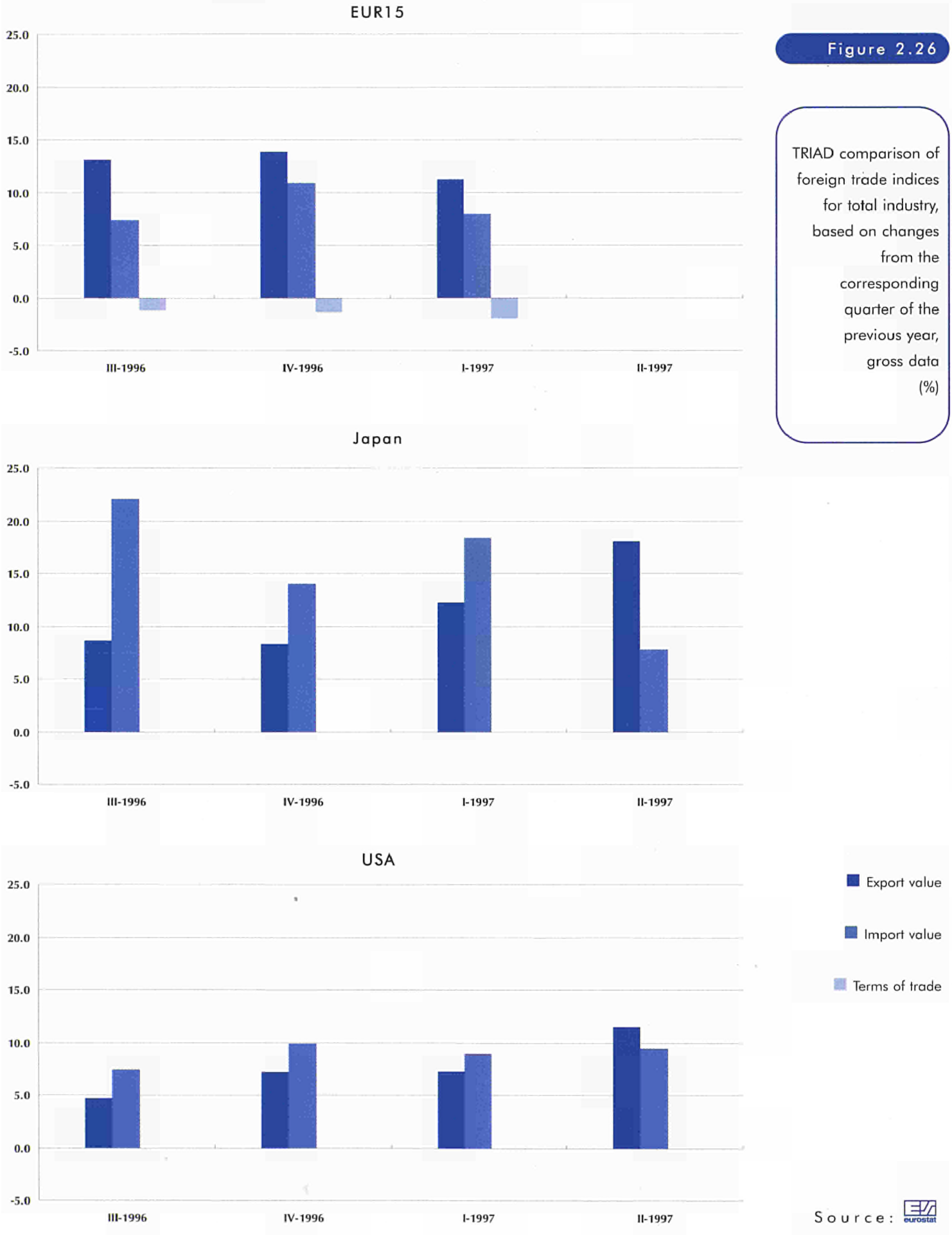
Source: DG II, Business Survey

eurostat

FOREIGN TRADE INDICES - GROSS DATA

Figure 2.26

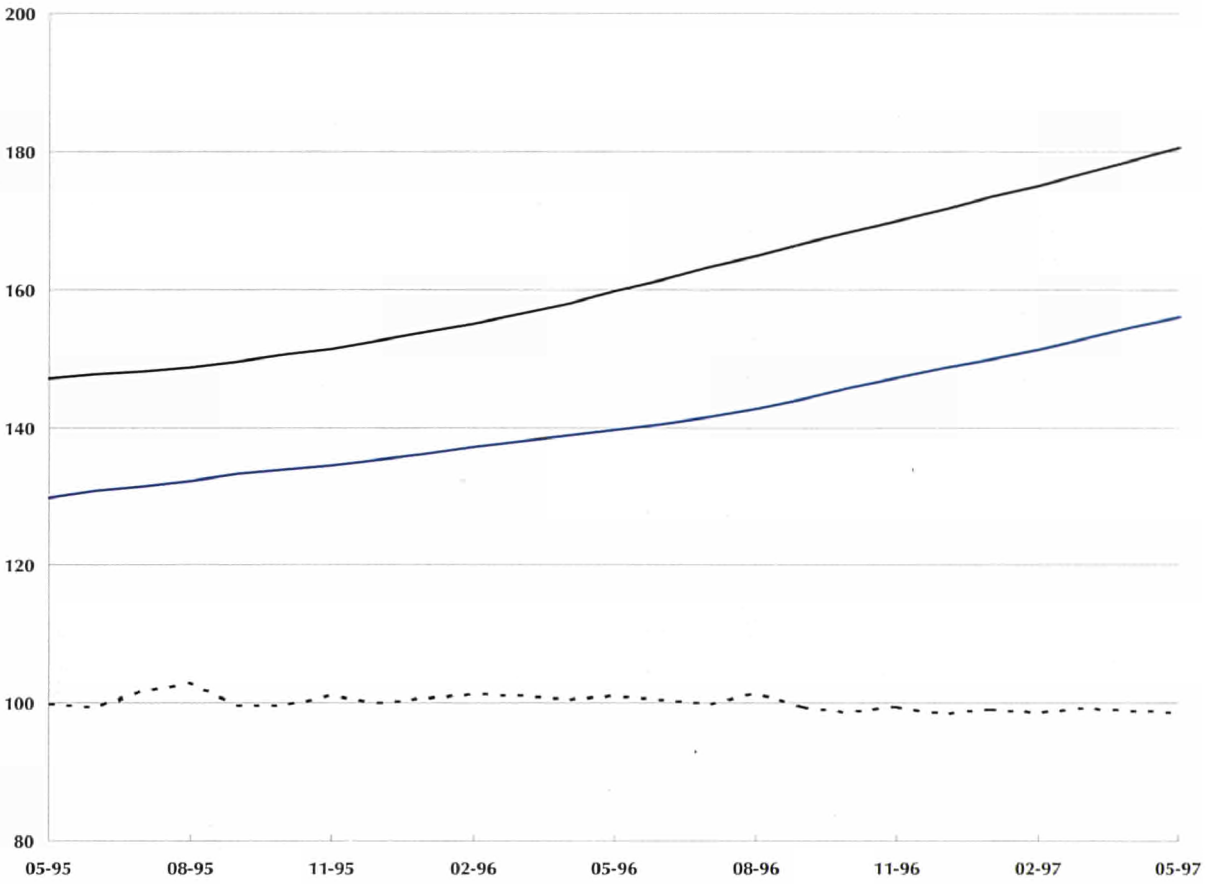
TRIAD comparison of foreign trade indices for total industry, based on changes from the corresponding quarter of the previous year, gross data (%)



Source: eurostat

Figure 2.27

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



Source: eurostat

Table 2.19

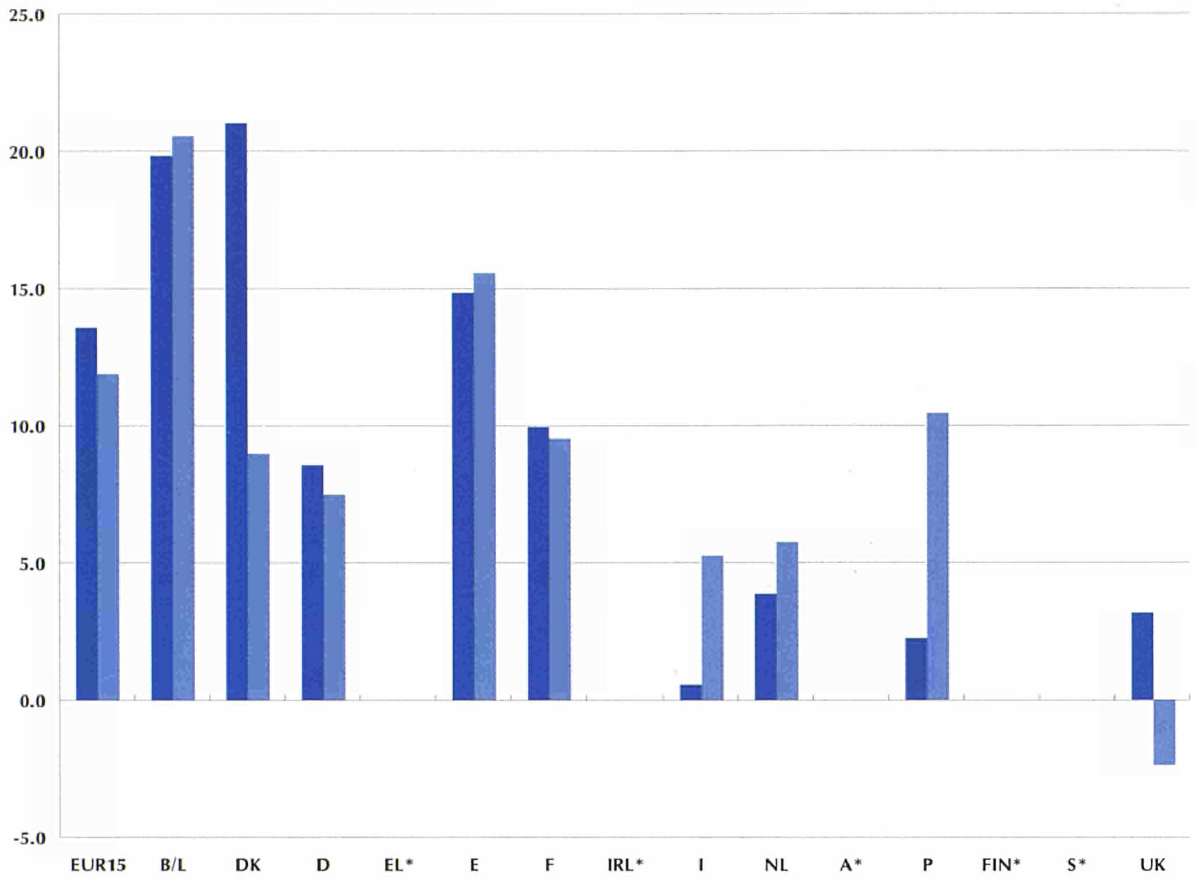
Three month on three month growth rates for foreign trade indices, trend cycle, value indices are in ECU terms (%)

	Latest 3 months available			Exports Value	Exports Volume	Imports Value	Imports Volume	Terms of trade
EUR15	03-97	⇨	05-97	3.1	2.0	3.1	1.5	0.2
B/L	03-97	⇨	05-97	4.6	3.2	5.2	3.9	1.6
DK	03-97	⇨	05-97	3.2	0.9	2.4	0.0	-1.4
D	03-97	⇨	05-97	2.3	1.6	1.6	0.9	-0.1
EL	01-97	⇨	03-97	3.3	2.5	-6.5	-8.9	-8.4
E	03-97	⇨	05-97	2.8	1.8	4.4	2.6	-0.3
F	03-97	⇨	05-97	3.5	3.5	4.1	2.2	0.6
IRL	02-97	⇨	04-97	4.0	5.8	4.4	3.3	-6.7
I	03-97	⇨	05-97	1.4	0.3	2.3	4.0	0.0
NL	03-97	⇨	05-97	1.1	-2.5	:	3.2	-0.7
A		⇨		:	:	:	:	:
P	03-97	⇨	05-97	2.2	0.8	0.6	0.5	0.0
FIN		⇨		:	:	:	:	:
S		⇨		:	:	:	:	:
UK	03-97	⇨	05-97	0.3	1.2	0.0	-0.3	-1.3

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 Mar-97 to May-97 (%)

Export value
Import value

Source: eurostat

Table 2.20

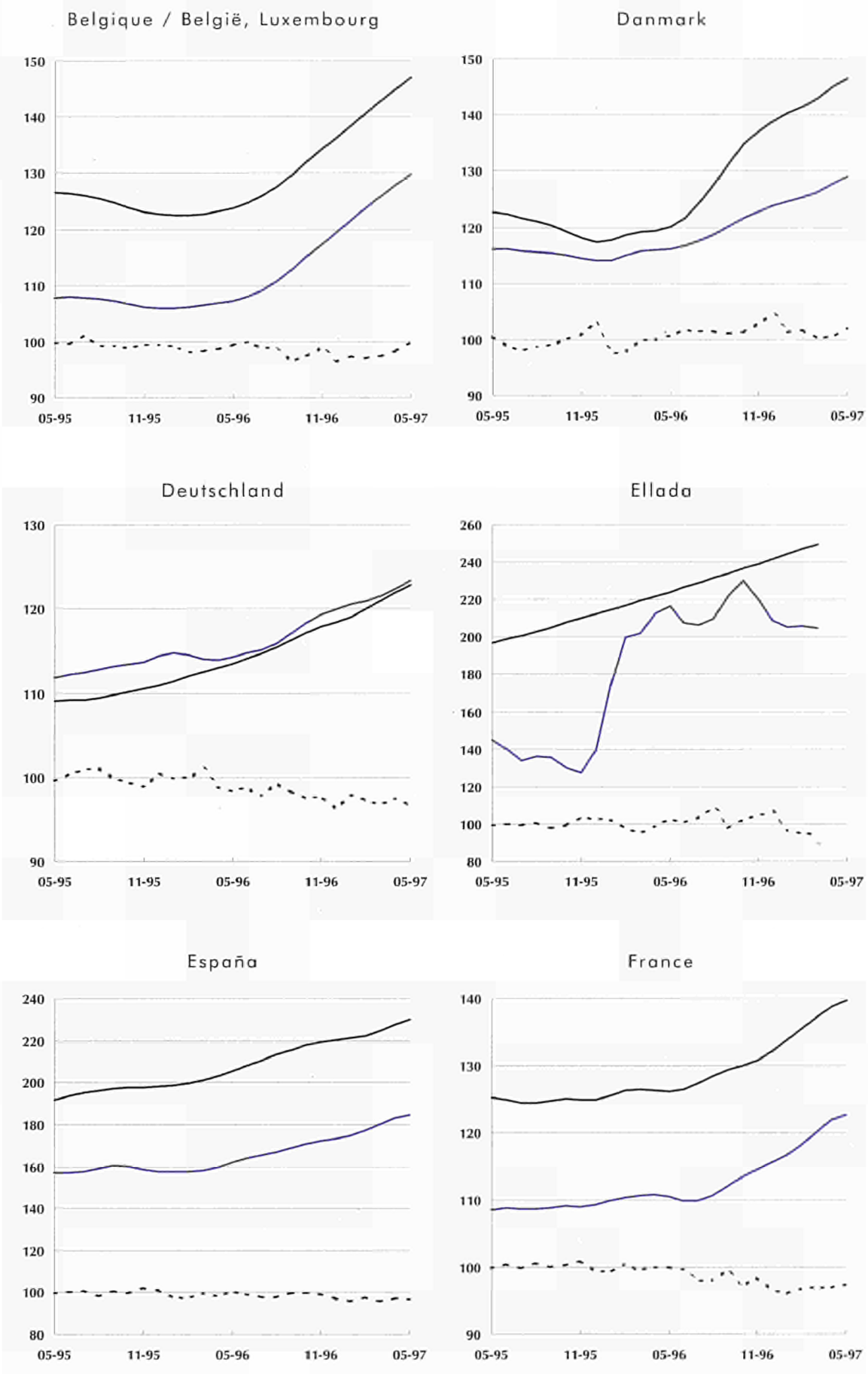
	Latest 3 months available			Exports Value	Exports Volume	Imports Value	Imports Volume	Terms of trade
EUR15	03-97	⇨	05-97	13.6	9.1	11.9	5.4	-1.9
B/L	03-97	⇨	05-97	19.9	14.2	20.6	14.4	-0.4
DK	03-97	⇨	05-97	21.0	17.0	9.0	6.1	0.8
D	03-97	⇨	05-97	8.6	5.9	7.5	2.3	-2.4
EL	01-97	⇨	03-97	-9.1	-13.6	1.7	-5.9	-2.8
E	03-97	⇨	05-97	14.8	11.1	15.6	8.8	-2.7
F	03-97	⇨	05-97	9.9	8.4	9.6	5.0	-2.7
IRL	02-97	⇨	04-97	7.5	12.1	12.4	8.4	-7.6
I	03-97	⇨	05-97	0.6	-0.7	5.3	6.6	2.5
NL	03-97	⇨	05-97	3.9	-2.2	5.7	-1.2	-0.8
A		⇨		:	:	:	:	:
P	03-97	⇨	05-97	2.2	1.4	10.4	8.4	-1.0
FIN		⇨		:	:	:	:	:
S		⇨		:	:	:	:	:
UK	03-97	⇨	05-97	3.2	6.1	-2.4	-0.1	-0.4

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)



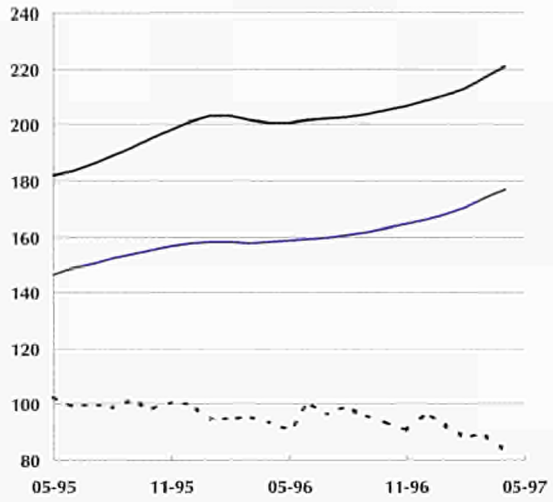
Source: eurostat

FOREIGN TRADE INDICES - TREND CYCLE

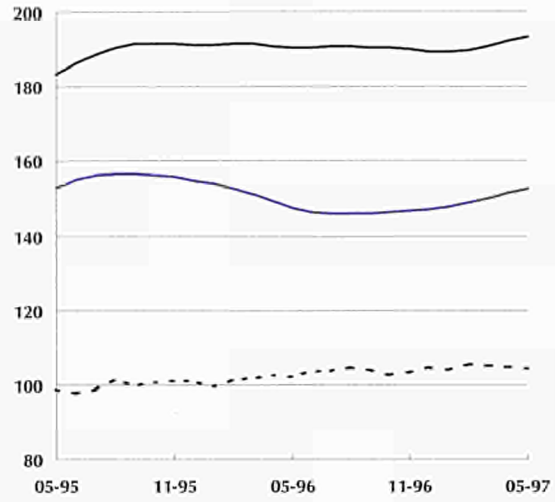
Figure 2.29

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

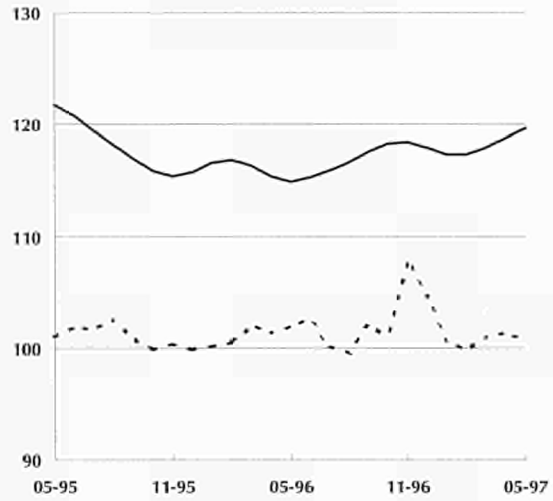
Ireland



Italia



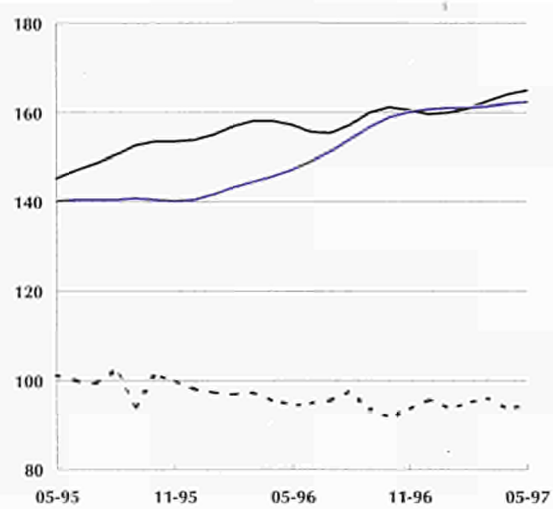
Nederland



Österreich

Not available

Portugal



Suomi / Finland

Not available

Export value index

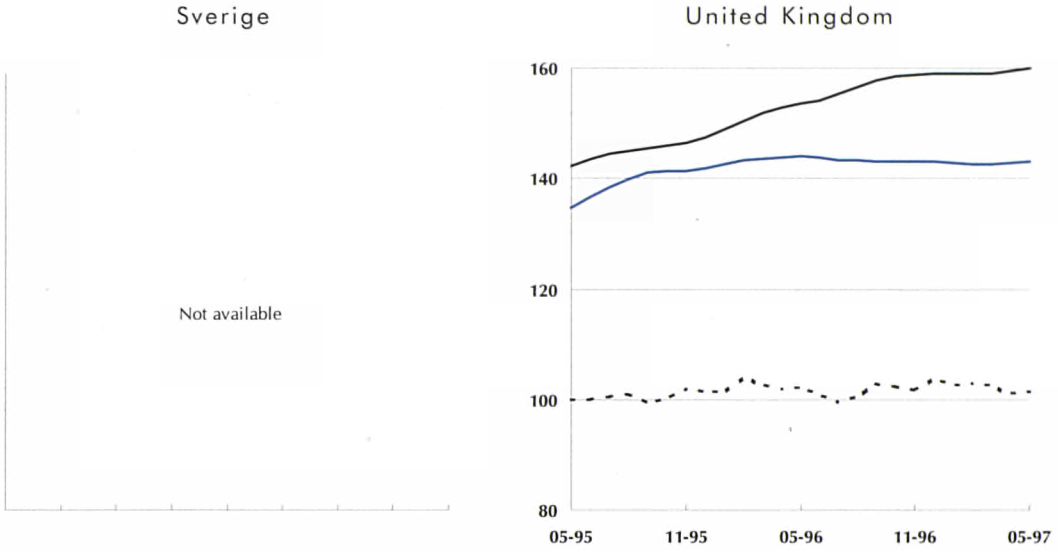
Import value index

Terms of trade

Source: eurostat

Figure 2.29

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



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: 10/11/97

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

Summer 1997 marked by faster growth in the Community production index

A look at the industrial production index of communications equipment and apparatus for the quarter ending August 1997 reveals a rise of 4.3% in comparison with the previous three-month period, whereas the figure for the quarter ending a month earlier was 3.5%. The growth rate exceeded the Community average in Sweden (13.9%) and the United Kingdom (6.1%) but was below the average in Germany (1.4%) and Italy (-2.7%). The quarterly growth rate in Community output has been moving upwards since November 1996, when it hit a low point of 1.3%. It has been rising faster since spring, with an increase of 2.2 points between May and August. In Germany, however, production is slowing down after a growth rate above 3.5% between autumn 1996 and spring 1997.

Output down in Italy

Because of the summer holidays the trend provides more reliable figures than a comparison between one month and the corresponding month of the previous year. It is therefore better to treat the following figures with some caution. The Community production index adjusted for working days shows a sharp increase of 9.7% in August 1997. This figure is nevertheless down by 5.8 points compared with the July figure. Two of the countries with the most vigorous performance were again Sweden and the United Kingdom. Production fell sharply in Italy.

Medium-term trend moving down

The index of producer prices reveals a downward trend that has now been under way for more than two and a half years. The figures nevertheless show that the trend has been easing off since spring, falling from 3.2% in March 1997 to 1.8% in August. Prices are falling in Germany (-0.7% in August 1997 compared with the same month in 1996), Finland (-2.3%) and the United Kingdom (-3.4%). In Italy, however, they are moving up slightly (+0.8%).

eurostat

EU production of communications equipment increased by 4.3% during the quarter ending August 1997 in comparison with quarter before

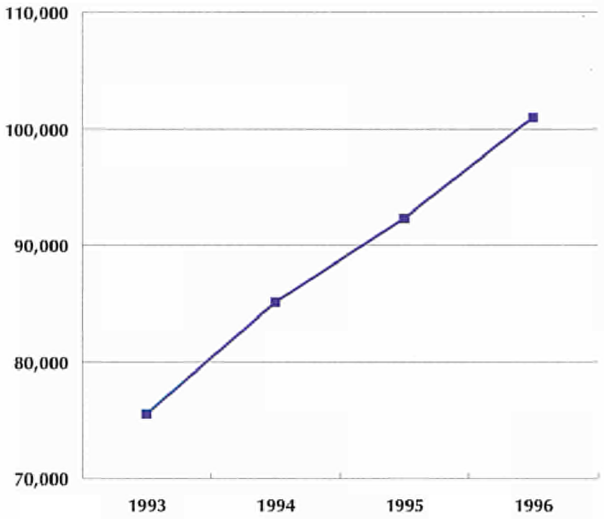


Figure 3.1

EUR15 production in current prices (million ECU)

Source: DEBA GEIE

Televisions, telephones and transistors

Communications equipment and apparatus accounted for 3.0% of total industrial output in 1996 (compared with 5.2% in the United States and 10.7% in Japan). There are three main areas of activity: manufacture of electronic components (transistors, cathode-ray tubes and resistors), transmission equipment and apparatus (e.g. radios, telephones and fax machines) and consumer goods (such as television receivers, VCRs and CD players). In 1996 these three branches accounted for 23%, 49% and 27% of output and for 29%, 44% and 27% of jobs in the communications industry. The electronic components branch seems to be labour-intensive, while the second branch (transmission equipment and apparatus) is more capital-intensive. The structure of the communications equipment industry with regard to these three branches varies noticeably among the members of the Triad. Indeed, while the manufacture of transmission equipment and apparatus accounts for almost half of total EU production, the figures for the United States and Japan are only 28% and 23%. The electronic components branch accounts for 23% of EU production, 67% of production in the United States and 48% in Japan.

Rapid technology-led development

The communications equipment industry is constantly changing. It is characterised by a variety of technological innovations and has become a symbol of progress. Examples in the case of television are digital broadcasting and cable and satellite channels, while video recorders can skip commercials and compact discs can be used for recording

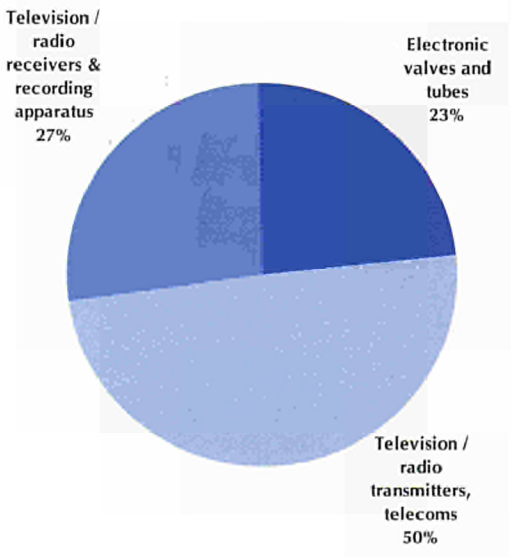


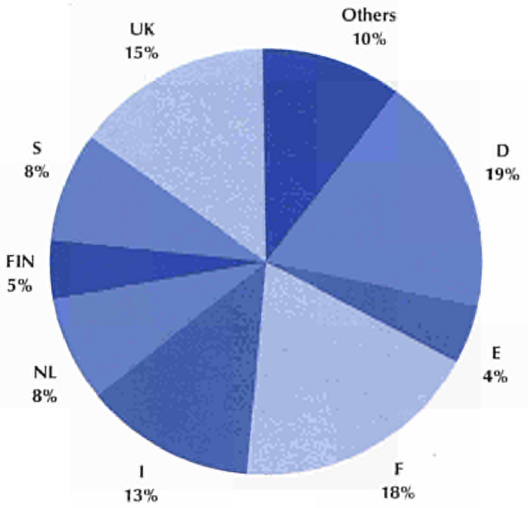
Figure 3.2

Share of production by industrial activity, 1996

Source: DEBA GEIE

Figure 3.3

Share of EUR15 value-added at factor cost, 1996



Source: DEBA GEIE

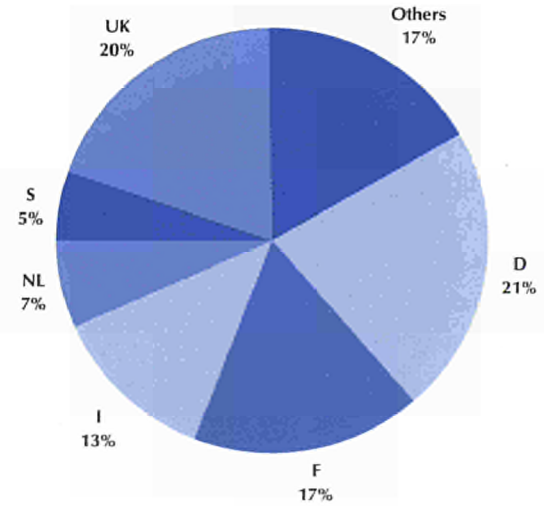
Producer prices continued to fall during the summer of 1997

at home. The telephony market is expanding rapidly, with a boom in mobile phones fuelled by competition among distributors and the opening up of markets to private and foreign operators. The use of fax machines is spreading and they are becoming common in private homes.

Manufacturers have to innovate all the time in order to generate new needs among consumers and to ensure that demand goes beyond simple replacement of old equipment - and all this is against a background of steadily falling prices in some sectors of the market, such as VCRs and video cameras. Some markets have reached saturation: there is little scope for improving the level of TV ownership, and in the case of VCRs market analysts now count the number of households with two machines. It is therefore crucial to detect new opportunities where demand can be stimulated, as is happening with mobile telephony. Another factor is that national markets are opening up to competition, which leads to a more aggressive approach to pricing but also to services. The end result is a higher rate of possession, i.e. much broader use of the product. Lastly, the consumer electronics and computer industries are moving closer together as they tend to merge across the range of information technologies.

Figure 3.4

Share of EUR15 number of employees, 1996



Source: DEBA GEIE

Production in real terms up by 17.6% in France in 1996

The value of communications equipment manufactured in the EU in 1996 came to ECU 101 billion. This figure is well behind the United States and Japan, where production amounted to ECU 151 billion and 250 billion respectively. The leading manufacturer in the Community is France, with 19.8% of total EU production, ahead of Germany (18.0%), the United Kingdom (14.8%), Italy (12.0%) and Sweden (9.5%).

In constant prices, the annual growth rate in 1996 for the production of communications equipment was 4.2% in the United Kingdom, 6.3% in the Netherlands and 17.6% in France. Production fell in Germany (-3.3%). By way of comparison, the equivalent growth rates in the United States and Japan in 1996 were 12.7% and 26.5% respectively.

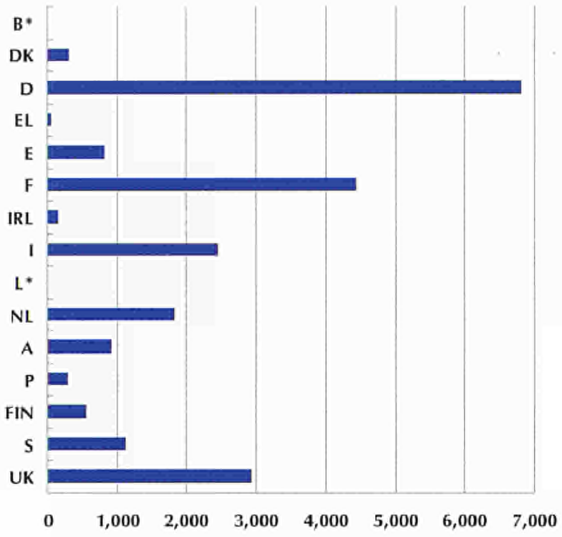
The electronic components branch showed considerable growth in real terms in the Netherlands (10.9%), France (27.3%) and Sweden (34.0%). In Japan, on the other hand, the increase was barely 1.4%. This was more than compensated by increases in the production of transmission apparatus (79.2%) and consumer electronics (56.8%), areas which produced a more mixed performance in the United States (+1.6% and -4.9%) respectively).

Netherlands specialising in the manufacture of consumer electronics

The specialisation ratio for the manufacture of communications equipment was 62% in Germany in 1996. The Community average was exceeded by the United Kingdom, France and the Netherlands (in ascending order), but the Member State with the highest specialisation ratio in this particular industry was Sweden (300%).

The countries that are relatively specialised, in relation to the Community average, in the manufacture of electronic components are also the main producers: France, Germany, the United Kingdom and Italy (in descending order). Sweden - second to France in the production ranking - and Finland specialise in the manufacture of transmission equipment and apparatus. The Netherlands, with Philips, easily has the highest specialisation ratio for consumer electronics (more than 300%).

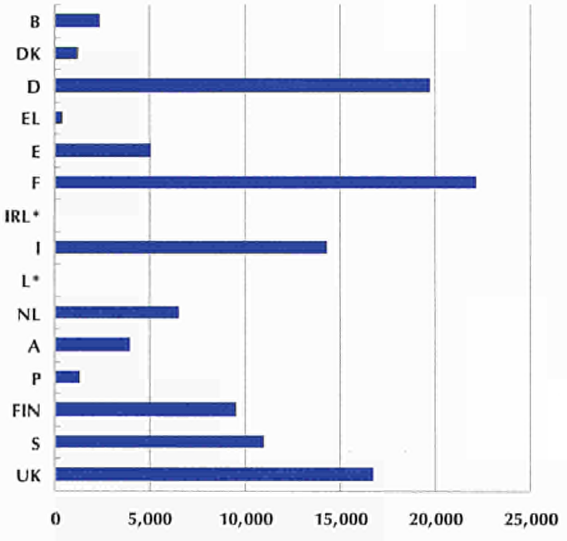
Figure 3.5



Labour costs, 1995 (million ECU)

Source: DEBA GEIE

Figure 3.6



Production in constant prices, 1996 (million ECU)

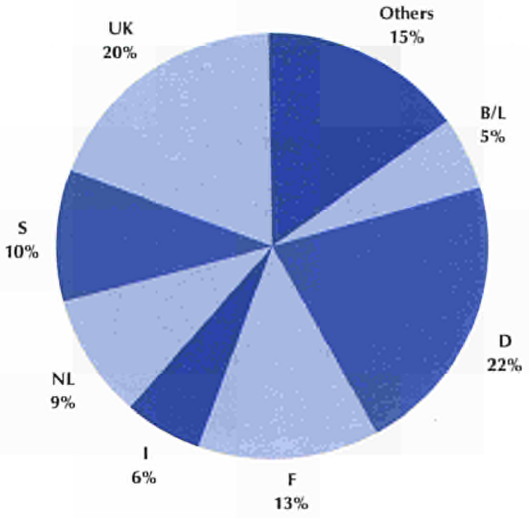
Source: DEBA GEIE

Community jobs down by 2.6% between 1995 and 1996

The communications equipment industry in the EU provided jobs for 654 000 people in 1996, down by 2.6% from the year before. The reduction affected all three branches of the industry, with jobs down by 1.7% in the electronic components branch and by 2.5% for transmission apparatus and 3.6% for consumer electronics. Germany was the Member State that provided the most jobs, with 21.9% of the Community total, followed by the United Kingdom (19.7%) and France (16.8%).

Figure 3.7

Share of world exports, 1996



Source: eurostat

European market main destination for Dutch exports

Two-thirds of EU exports of communications equipment in 1996 went to other Member States, with the rest of the Community accounting for 93% of Netherlands exports, while intra-Community trade accounted for 76% of UK exports, 66% in the case of France and 58% for Germany. Sweden was the only Member State where the majority of exports went to non-member countries, with non-Community countries accounting for more than 70% of exports. A breakdown of the overall figures shows that three-quarters of EU exports in the electronic components and consumer electronics branches go to other Member States, whereas the figure for transmission equipment and apparatus is little over half (51%). Although imports tend to be from other Member States (57%), non-Community countries provide 63% of UK imports and 57% in the case of the Netherlands. It is in the electronic components branch that the EU relies most on extra-Community sources.

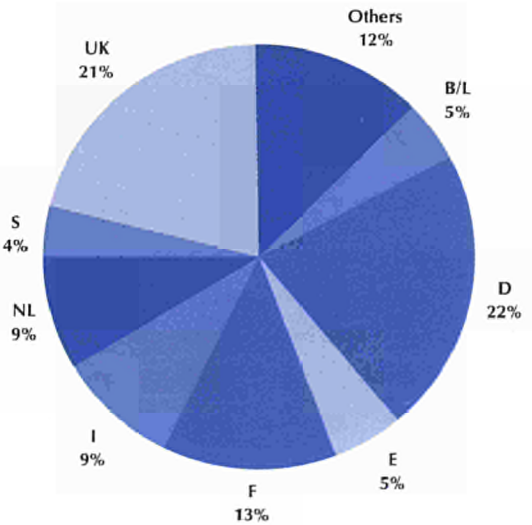
EU cover ratio improves

Total EU exports of equipment were up by 11.7% between 1995 and 1996, while imports fell by 8.7%. The pattern differs from country to country, however, with Germany recording a fall in trade in value terms while exports from the Netherlands and Sweden were up by 26.3% and 32.8% respectively.

Although the European Union has a structural deficit in trade in communications equipment, the cover ratio has steadily improved throughout the 1990s, moving from 42.6% in 1990 to 68.9% in 1996. The trade balance is negative in the electronic components branch, where the cover ratio has remained steady at 40% throughout the decade. There has been an improvement in the consumer electronics branch, where the cover ratio has gone up from 26% to 48% in six years. Lastly, although until 1992 the EU was importing more transmission equipment and apparatus than it was exporting, the cover ratio for this particular branch was 174% in 1996. In value terms, Sweden exports more than twice as much as it imports, while the Netherlands and France sell almost as much as they buy.

Figure 3.8

Share of world imports, 1996



Source: eurostat

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This is a biennial publication produced by Eurostat in co-operation with DG XXIII of the European Commission.

There were around 16 million small and medium-sized enterprises (SMEs) in 1992 in the countries of EUR15, employing more than 100 million people.

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Part 2: specific analyses, such as enterprise creation, the innovative behaviour of SMEs or regional analyses;
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The sources used are normally existing business registers in the European countries. The following economic indicators are provided: employment, turnover and sometimes value added and labour costs.

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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	:	:	28,721.1	:	30,868.4	7.5	33,367.7	8.1	36,339.5	8.9
B	:	:	:	:	:	:	:	:	:	:
Share (%)	:		:		:		:		:	
DK	376.2	14.3	377.3	0.3	429.6	13.9	470.9	9.6	540.8	14.8
Share (%)	:		1.3		1.4		1.4		1.5	
D	7,315.7	-4.9	7,059.7	-3.5	7,075.8	0.2	6,990.2	-1.2	6,629.8	-5.2
Share (%)	:		24.6		22.9		20.9		18.2	
EL	87.2	14.6	99.7	14.3	81.8	-18.0	67.9	-17.0	62.6	-7.8
Share (%)	:		0.3		0.3		0.2		0.2	
E	1,347.3	-30.5	1,337.8	-0.7	1,361.1	1.7	1,595.5	17.2	1,596.9	0.1
Share (%)	:		4.7		4.4		4.8		4.4	
F	4,941.3	5.4	5,028.4	1.8	5,285.4	5.1	5,900.1	11.6	6,623.5	12.3
Share (%)	:		17.5		17.1		17.7		18.2	
IRL	184.8	-16.5	264.4	43.1	296.1	12.0	360.5	21.7	415.0	15.1
Share (%)	:		0.9		1.0		1.1		1.1	
I	4,170.8	3.1	3,820.6	-8.4	3,778.4	-1.1	3,963.1	4.9	4,642.5	17.1
Share (%)	:		13.3		12.2		11.9		12.8	
L	:	:	:	:	:	:	:	:	:	:
Share (%)	:		:		:		:		:	
NL	2,398.8	12.2	2,574.2	7.3	2,665.4	3.5	2,768.0	3.8	2,898.9	4.7
Share (%)	:		9.0		8.6		8.3		8.0	
A	:	:	:	:	:	:	:	:	:	:
Share (%)	:		:		:		:		:	
P	356.6	3.4	354.1	-0.7	422.3	19.3	566.6	34.2	450.4	-20.5
Share (%)	:		1.2		1.4		1.7		1.2	
FIN	508.6	16.9	656.9	29.2	935.1	42.4	1,171.6	25.3	1,678.8	43.3
Share (%)	:		2.3		3.0		3.5		4.6	
S	1,116.7	18.5	1,230.8	10.2	1,426.2	15.9	2,080.4	45.9	3,078.1	48.0
Share (%)	:		4.3		4.6		6.2		8.5	
UK	3,899.6	-5.8	4,058.4	4.1	5,015.2	23.6	5,174.7	3.2	5,441.7	5.2
Share (%)	:		14.1		16.2		15.5		15.0	

Source: DEBA GEIE

Table 3.2

Production in current prices (million ECU)

	1992	t / t-1 (%)	1993	t / t-1 (%)	1994	t / t-1 (%)	1995	t / t-1 (%)	1996	t / t-1 (%)
EUR15	:	:	75,390.8	:	85,011.0	12.8	92,240.8	8.5	100,930.6	9.4
B	2,106.7	1.2	2,208.7	4.8	2,404.6	8.9	2,588.3	7.6	2,713.4	4.8
Share (%)	:		2.9		2.8		2.8		2.7	
DK	872.0	16.4	918.8	5.4	989.4	7.7	1,093.6	10.5	1,267.2	15.9
Share (%)	:		1.2		1.2		1.2		1.3	
D	18,002.5	-3.5	18,670.5	3.7	19,380.5	3.8	19,387.1	0.0	18,170.8	-6.3
Share (%)	:		24.8		22.8		21.0		18.0	
EL	384.3	14.1	431.5	12.3	353.3	-18.1	292.7	-17.2	270.1	-7.7
Share (%)	:		0.6		0.4		0.3		0.3	
E	3,393.3	-21.7	3,328.0	-1.9	3,415.8	2.6	3,905.6	14.3	4,047.0	3.6
Share (%)	:		4.4		4.0		4.2		4.0	
F	13,348.8	7.1	14,063.3	5.4	15,610.1	11.0	17,595.2	12.7	19,985.3	13.6
Share (%)	:		18.7		18.4		19.1		19.8	
IRL	650.1	2.8	910.0	40.0	1,033.1	13.5	1,254.1	21.4	1,451.4	15.7
Share (%)	:		1.2		1.2		1.4		1.4	
I	10,650.2	4.2	9,486.4	-10.9	9,912.5	4.5	10,394.1	4.9	12,137.4	16.8
Share (%)	:		12.6		11.7		11.3		12.0	
L	:	:	:	:	:	:	:	:	:	:
Share (%)	:		:		:		:		:	
NL	5,728.5	4.4	5,708.8	-0.3	5,842.6	2.3	6,520.9	11.6	6,818.1	4.6
Share (%)	:		7.6		6.9		7.1		6.8	
A	2,962.3	-4.1	2,951.1	-0.4	3,749.8	27.1	3,876.6	3.4	3,693.9	-4.7
Share (%)	:		3.9		4.4		4.2		3.7	
P	1,127.0	11.7	1,099.0	-2.5	1,311.2	19.3	1,759.3	34.2	1,398.3	-20.5
Share (%)	:		1.5		1.5		1.9		1.4	
FIN	1,189.5	11.2	1,715.9	44.3	2,792.4	62.7	3,227.8	15.6	4,486.4	39.0
Share (%)	:		2.3		3.3		3.5		4.4	
S	3,165.4	12.5	3,464.8	9.5	4,875.1	40.7	6,502.9	33.4	9,607.3	47.7
Share (%)	:		4.6		5.7		7.0		9.5	
UK	9,962.7	-5.4	10,434.1	4.7	13,340.7	27.9	13,842.6	3.8	14,884.0	7.5
Share (%)	:		13.8		15.7		15.0		14.7	

Source: DEBA GEIE

NUMBER OF EMPLOYEES & LABOUR COSTS

Table 3.3

Number of employees (units)

	1992	t / t-1 (%)	1993	t / t-1 (%)	1994	t / t-1 (%)	1995	t / t-1 (%)	1996	t / t-1 (%)
EUR15	:	:	670,404	:	671,642	0.2	671,572	0.0	654,183	-2.6
B	13,318	-6.7	12,780	-4.0	12,155	-4.9	12,251	0.8	12,630	3.1
Share (%)	:		1.9		1.8		1.8		1.9	
DK	8,956	-5.1	8,535	-4.7	8,722	2.2	9,178	5.2	:	:
Share (%)	:		1.3		1.3		1.4		:	
D	201,536	-6.7	183,252	-9.1	165,918	-9.5	150,610	-9.2	142,963	-5.1
Share (%)	:		27.3		24.7		22.4		21.9	
EL	2,560	8.2	2,383	-6.9	2,271	-4.7	2,235	-1.6	2,240	0.2
Share (%)	:		0.4		0.3		0.3		0.3	
E	31,948	-17.9	30,342	-5.0	29,411	-3.1	28,819	-2.0	22,354	-22.4
Share (%)	:		4.5		4.4		4.3		3.4	
F	108,587	-2.4	103,055	-5.1	106,591	3.4	110,577	3.7	109,902	-0.6
Share (%)	:		15.4		15.9		16.5		16.8	
IRL	5,199	6.4	6,097	17.3	6,344	4.1	6,859	8.1	7,328	6.8
Share (%)	:		0.9		0.9		1.0		1.1	
I	88,395	8.0	86,076	-2.6	88,239	2.5	85,155	-3.5	83,278	-2.2
Share (%)	:		12.8		13.1		12.7		12.7	
L	:	:	:	:	:	:	:	:	:	:
Share (%)	:		:		:		:		:	
NL	52,915	-7.2	50,697	-4.2	47,160	-7.0	47,065	-0.2	45,538	-3.2
Share (%)	:		7.6		7.0		7.0		7.0	
A	24,601	-3.7	23,050	-6.3	24,114	4.6	23,342	-3.2	22,598	-3.2
Share (%)	:		3.4		3.6		3.5		3.5	
P	17,679	1.3	15,681	-11.3	15,509	-1.1	17,604	13.5	16,177	-8.1
Share (%)	:		2.3		2.3		2.6		2.5	
FIN	11,185	1.3	12,326	10.2	15,438	25.2	16,673	8.0	:	:
Share (%)	:		1.8		2.3		2.5		:	
S	26,886	-5.6	28,460	5.9	30,362	6.7	33,005	8.7	34,138	3.4
Share (%)	:		4.2		4.5		4.9		5.2	
UK	111,315	-7.8	107,669	-3.3	119,408	10.9	128,200	7.4	128,632	0.3
Share (%)	:		16.1		17.8		19.1		19.7	

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	:	:	:	:	21,872.4	:	22,713.8	3.8	23,193.8	2.1
B	:	:	:	:	:	:	:	:	:	:
Share (%)	:		:		:		:		:	
DK	262.2	-8.2	252.2	-3.8	249.6	-1.0	264.1	5.8	294.5	11.5
Share (%)	:		:		1.1		1.2		1.3	
D	6,975.6	6.8	7,069.2	1.3	7,146.3	1.1	6,937.6	-2.9	6,797.4	-2.0
Share (%)	:		:		32.7		30.5		29.3	
EL	40.6	34.9	43.0	5.9	44.4	3.3	45.7	2.9	46.3	1.3
Share (%)	:		:		0.2		0.2		0.2	
E	1,172.3	-6.5	950.4	-18.9	864.7	-9.0	811.9	-6.1	813.3	0.2
Share (%)	:		:		4.0		3.6		3.5	
F	3,656.7	4.0	3,849.6	5.3	3,898.1	1.3	4,138.6	6.2	4,420.3	6.8
Share (%)	:		:		17.8		18.2		19.1	
IRL	103.5	4.9	119.0	15.0	125.2	5.2	134.6	7.5	146.2	8.6
Share (%)	:		:		0.6		0.6		0.6	
I	2,742.4	21.1	3,036.5	10.7	2,653.4	-12.6	2,664.1	0.4	2,440.3	-8.4
Share (%)	:		:		12.1		11.7		10.5	
L	:	:	:	:	:	:	:	:	:	:
Share (%)	:		:		:		:		:	
NL	1,785.2	-5.9	1,698.6	-4.9	1,749.1	3.0	1,740.9	-0.5	1,812.9	4.1
Share (%)	:		:		8.0		7.7		7.8	
A	758.0	29.4	781.9	3.2	815.3	4.3	893.5	9.6	914.5	2.4
Share (%)	:		:		3.7		3.9		3.9	
P	221.3	36.5	272.1	23.0	238.1	-12.5	239.0	0.4	287.7	20.4
Share (%)	:		:		1.1		1.1		1.2	
FIN	308.8	-10.8	289.0	-6.4	297.7	3.0	431.9	45.1	544.6	26.1
Share (%)	:		:		1.4		1.9		2.3	
S	936.7	25.0	927.6	-1.0	855.6	-7.8	978.5	14.4	1,102.6	12.7
Share (%)	:		:		3.9		4.3		4.8	
UK	2,556.8	3.3	2,351.1	-8.0	2,323.0	-1.2	2,808.5	20.9	2,912.9	3.7
Share (%)	:		:		10.6		12.4		12.6	

Source: DEBA GEIE

Table 3.5

Extra-EUR15 exports (million ECU)

	1992	t / t-1 (%)	1993	t / t-1 (%)	1994	t / t-1 (%)	1995	t / t-1 (%)	1996	t / t-1 (%)
EUR15	10,074.9	9.0	12,383.8	22.9	15,847.6	28.0	19,052.1	20.2	**21,903.9**	**15.0**
B/L	172.2	-4.0	224.1	30.1	259.8	15.9	322.9	24.3	387.7	20.1
Share (%)	1.7		1.8		1.6		1.7		1.8	
DK	203.7	13.2	231.6	13.7	299.3	29.2	326.0	8.9	359.9	10.4
Share (%)	2.0		1.9		1.9		1.7		1.6	
D	3,201.9	8.3	3,843.6	20.0	4,773.2	24.2	5,446.9	14.1	5,984.1	9.9
Share (%)	31.8		31.0		30.1		28.6		27.3	
EL	2.5	-3.8	5.5	120.0	7.8	41.8	15.3	96.2	**30.6**	**100.0**
Share (%)	0.0		0.0		0.0		0.1		**0.1**	
E	275.0	15.4	478.9	74.1	646.4	35.0	713.5	10.4	713.3	0.0
Share (%)	2.7		3.9		4.1		3.7		3.3	
F	1,681.3	7.2	2,044.0	21.6	2,312.6	13.1	3,182.1	37.6	3,014.9	-5.3
Share (%)	16.7		16.5		14.6		16.7		13.8	
IRL	87.3	-9.0	125.3	43.5	201.3	60.7	242.3	20.4	418.7	72.8
Share (%)	0.9		1.0		1.3		1.3		1.9	
I	709.8	16.6	857.3	20.8	979.3	14.2	1,249.5	27.6	1,302.1	4.2
Share (%)	7.0		6.9		6.2		6.6		5.9	
NL	391.3	129.0	365.2	-6.7	377.6	3.4	471.9	25.0	435.7	-7.7
Share (%)	3.9		2.9		2.4		2.5		2.0	
A	363.8	-0.5	418.1	14.9	567.3	35.7	251.4	-55.7	**432.4**	**72.0**
Share (%)	3.6		3.4		3.6		1.3		**2.0**	
P	38.0	25.8	31.0	-18.4	45.7	47.4	53.5	17.1	70.6	32.0
Share (%)	0.4		0.3		0.3		0.3		0.3	
FIN	274.8	19.0	496.4	80.6	846.8	70.6	1,118.3	32.1	959.0	-14.2
Share (%)	2.7		4.0		5.3		5.9		4.4	
S	1,305.8	2.4	1,556.7	19.2	2,603.7	67.3	3,407.4	30.9	4,717.2	38.4
Share (%)	13.0		12.6		16.4		17.9		21.5	
UK	1,367.5	2.2	1,706.0	24.8	1,926.8	12.9	2,251.0	16.8	3,077.8	36.7
Share (%)	13.6		13.8		12.2		11.8		14.1	

Source: eurostat

Table 3.6

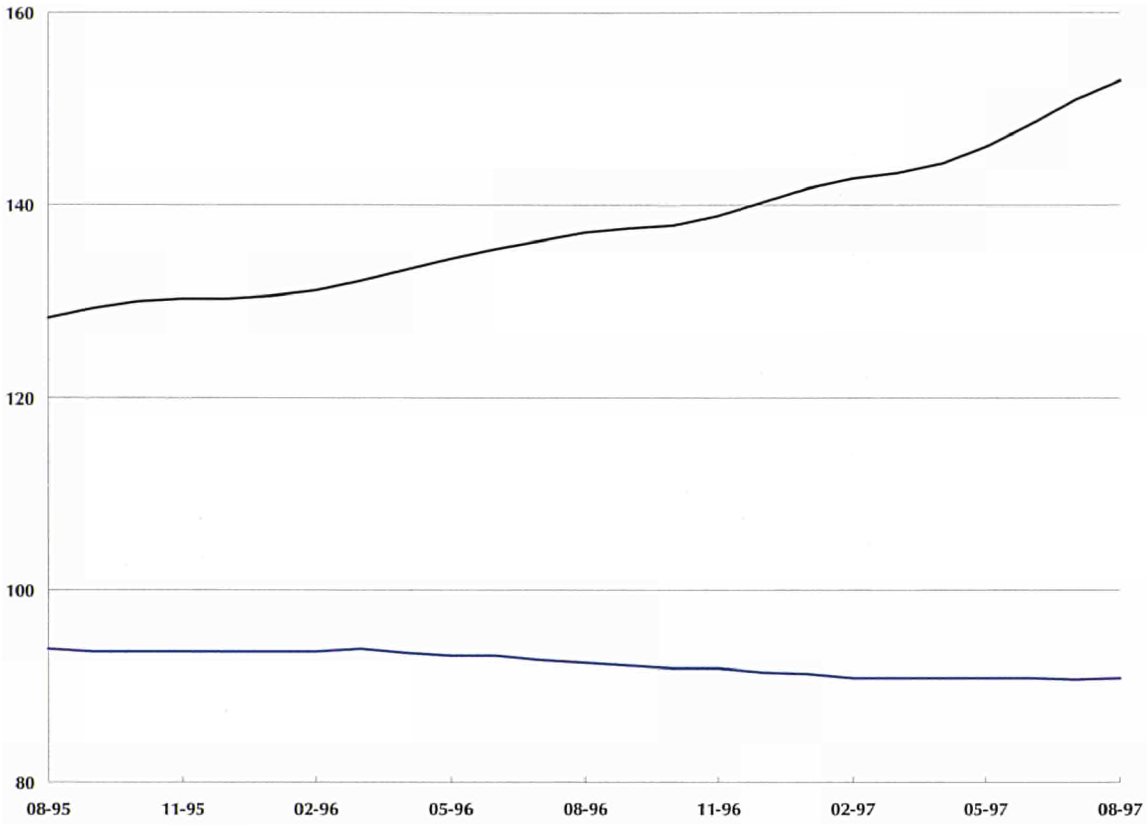
Extra-EUR15 imports (million ECU)

	1992	t / t-1 (%)	1993	t / t-1 (%)	1994	t / t-1 (%)	1995	t / t-1 (%)	1996	t / t-1 (%)
EUR15	21,424.7	-4.4	23,587.8	10.1	27,550.6	16.8	29,211.6	6.0	**31,789.4**	**8.8**
B/L	1,150.8	-7.6	1,215.1	5.6	948.9	-21.9	1,060.8	11.8	1,125.8	6.1
Share (%)	5.4		5.2		3.4		3.6		3.5	
DK	243.5	2.9	249.0	2.3	289.1	16.1	313.5	8.4	343.7	9.6
Share (%)	1.1		1.1		1.0		1.1		1.1	
D	6,420.6	-7.1	6,807.5	6.0	7,438.4	9.3	7,830.6	5.3	7,746.3	-1.1
Share (%)	30.0		28.9		27.0		26.8		24.4	
EL	121.3	14.4	155.9	28.5	104.9	-32.7	94.9	-9.5	**125.8**	**32.6**
Share (%)	0.6		0.7		0.4		0.3		**0.4**	
E	1,300.3	-1.8	804.1	-38.2	911.6	13.4	1,001.9	9.9	1,038.4	3.6
Share (%)	6.1		3.4		3.3		3.4		3.3	
F	2,331.3	-8.6	2,525.9	8.3	2,635.0	4.3	3,241.0	23.0	3,564.3	10.0
Share (%)	10.9		10.7		9.6		11.1		11.2	
IRL	178.0	-21.5	315.0	77.0	457.3	45.2	582.9	27.5	576.0	-1.2
Share (%)	0.8		1.3		1.7		2.0		1.8	
I	1,672.7	-11.7	1,664.6	-0.5	1,688.4	1.4	1,662.1	-1.6	1,704.5	2.6
Share (%)	7.8		7.1		6.1		5.7		5.4	
NL	1,608.3	18.9	1,536.6	-4.5	1,952.7	27.1	2,733.8	40.0	3,653.1	33.6
Share (%)	7.5		6.5		7.1		9.4		11.5	
A	861.5	-3.1	995.2	15.5	1,197.8	20.4	358.6	-70.1	**495.3**	**38.1**
Share (%)	4.0		4.2		4.3		1.2		**1.6**	
P	179.1	13.6	194.2	8.4	205.8	6.0	238.0	15.6	231.0	-2.9
Share (%)	0.8		0.8		0.7		0.8		0.7	
FIN	441.9	13.2	600.5	35.9	943.2	57.1	765.9	-18.8	487.8	-36.3
Share (%)	2.1		2.5		3.4		2.6		1.5	
S	929.9	-7.3	1,117.3	20.2	1,427.6	27.8	987.7	-30.8	942.4	-4.6
Share (%)	4.3		4.7		5.2		3.4		3.0	
UK	3,985.5	-3.1	5,406.7	35.7	7,350.0	35.9	8,340.0	13.5	9,755.0	17.0
Share (%)	18.6		22.9		26.7		28.6		30.7	

Source: eurostat

PRODUCTION & PRODUCER PRICE INDICES

Figure 3.9



EUR15 production and producer price indices (1990 = 100)

Source: eurostat

Table 3.7

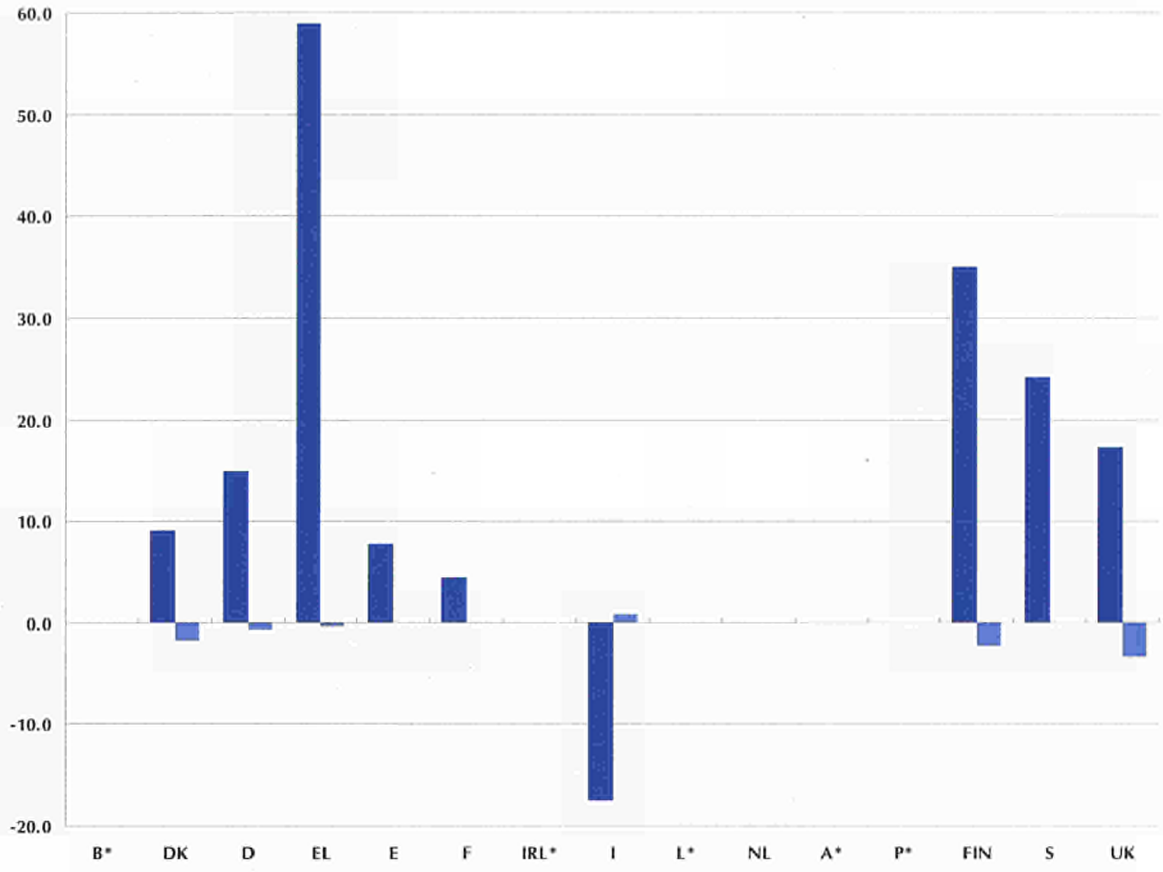
	Latest 3 months available			Production index t / t-1	Production index t / t-4	Latest month available	Producer price index t / t-3	Producer price index t / t-12
EUR15	06-97	⇨	08-97	4.3	11.6	08-97	0.0	-1.8
B		⇨		:	:		:	:
DK	06-97	⇨	08-97	4.7	9.1	08-97	-0.5	-1.8
D	07-97	⇨	09-97	1.3	9.8	09-97	-0.3	-0.1
EL	06-97	⇨	08-97	4.8	59.0	08-97	-0.3	-0.5
E	06-97	⇨	08-97	7.9	7.7	08-97	0.4	-0.1
F	06-97	⇨	08-97	1.6	4.4	12-93	-0.7	-21.4
IRL		⇨		:	:		:	:
I	06-97	⇨	08-97	-2.7	-17.5	08-97	0.4	0.8
L		⇨		:	:		:	:
NL	02-97	⇨	04-97	2.0	8.0	08-97	0.0	0.0
A	12-96	⇨	02-97	2.4	19.3		:	:
P	05-97	⇨	07-97	-0.2	1.5		:	:
FIN	06-97	⇨	08-97	9.3	35.0	09-97	-1.3	-2.0
S	06-97	⇨	08-97	13.9	24.1		:	:
UK	06-97	⇨	08-97	6.1	17.3	08-97	-0.2	-3.4
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, June-97 to Aug-97 (%)

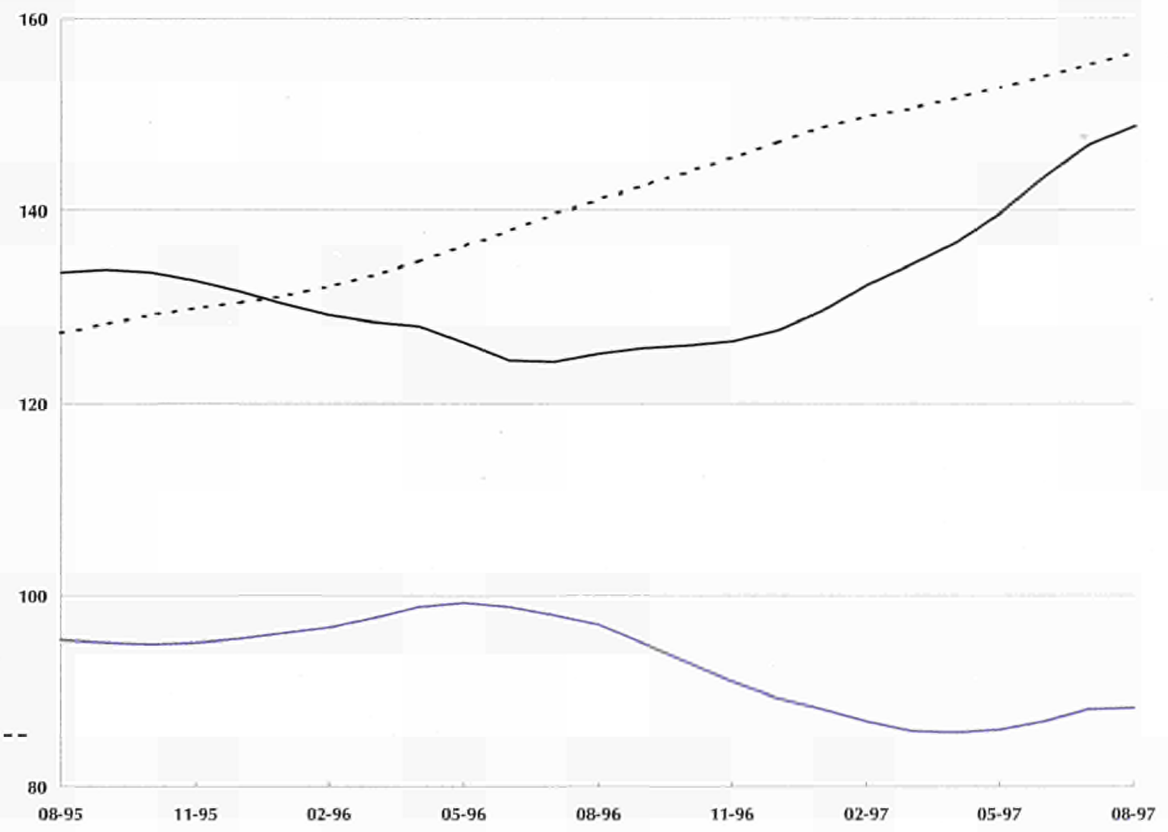


Production
Producer price index

Source: eurostat

Figure 3.11

Production index for individual NACE Rev.1 groupings, trend cycle (1990 = 100)



Electronic valves and tubes
Television/radio transmitters, telecoms
Television/radio receivers and recording apparatus

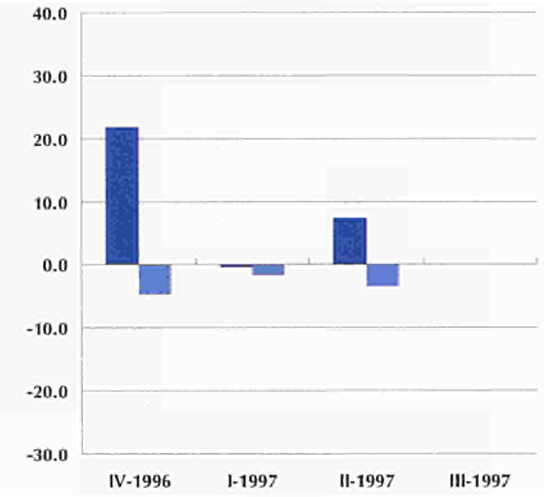
Source: eurostat

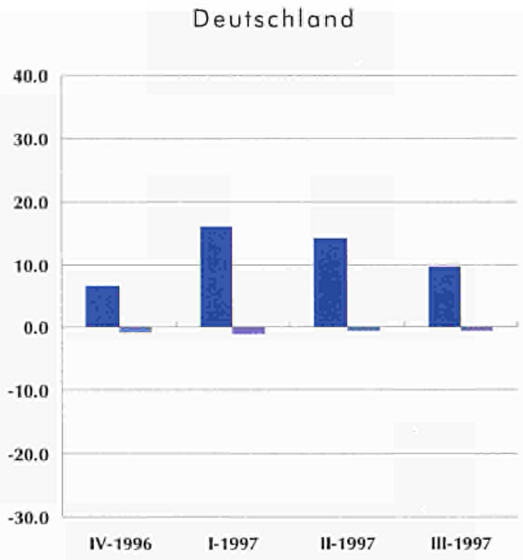
Figure 3.12

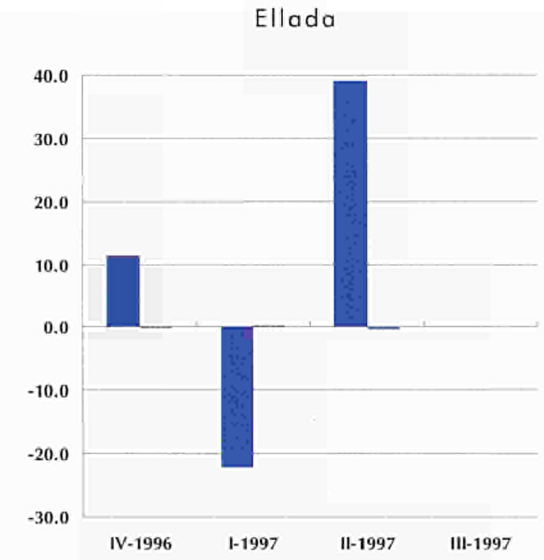
Annual growth rates for production and producer price indices, based on changes from the corresponding quarter of the previous year (%)

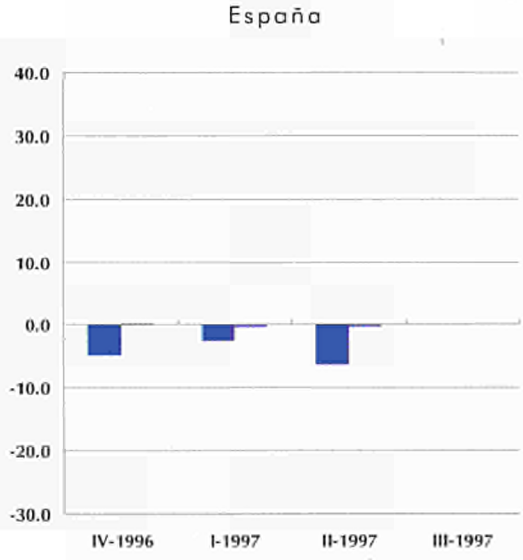
Belgique / België

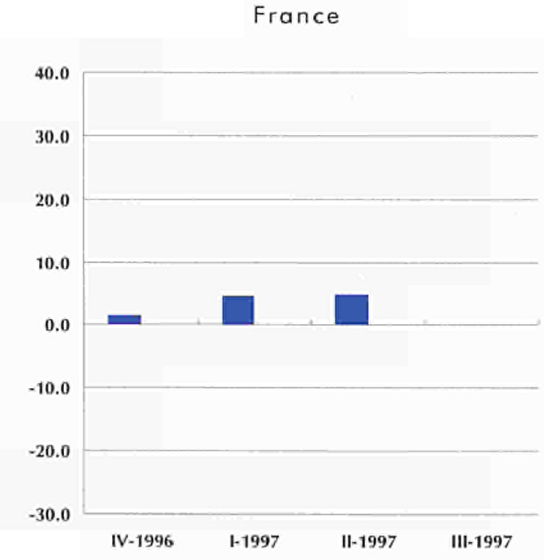
Not available











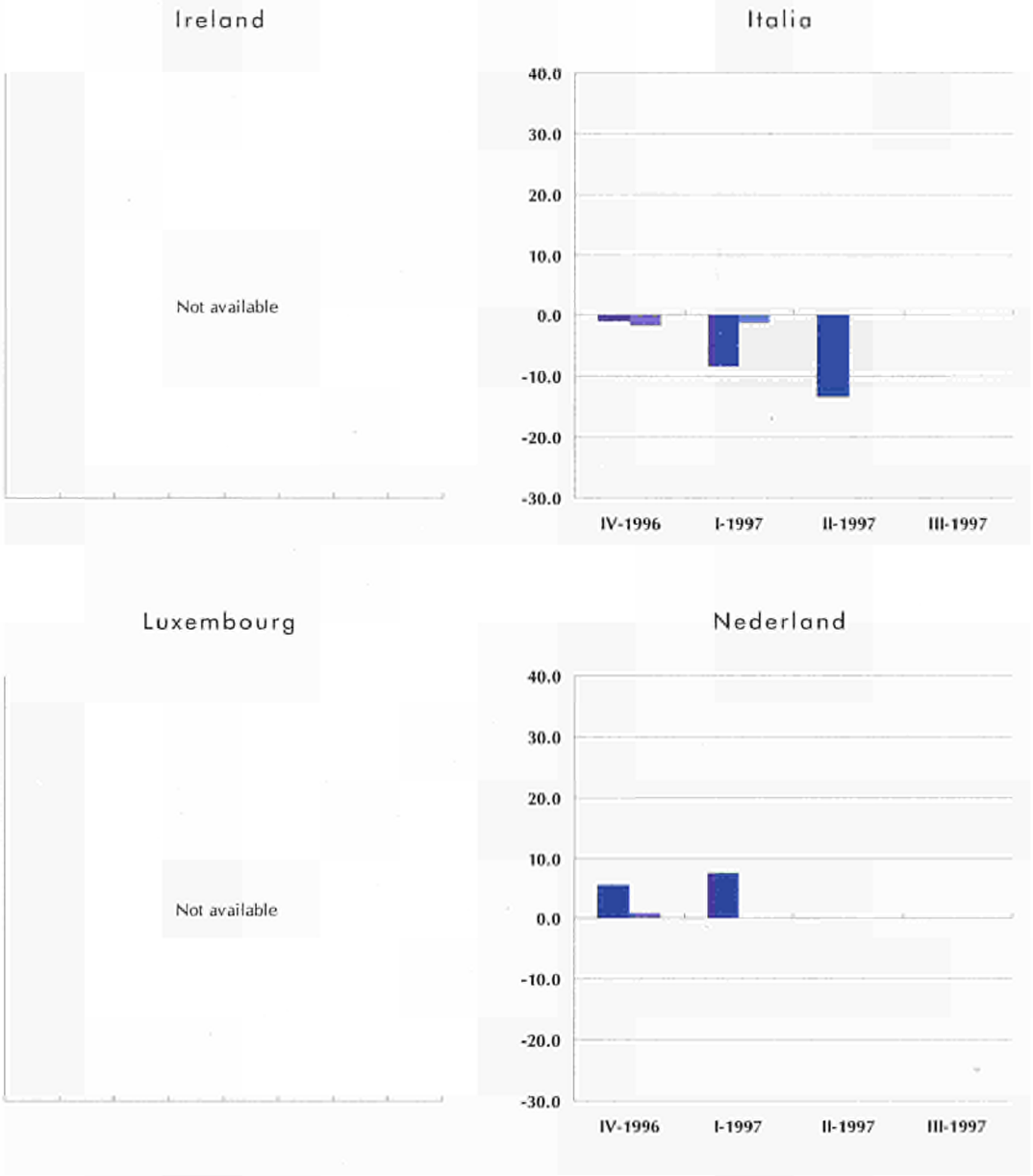
Production index

Producer price index

Source: eurostat

Figure 3.12

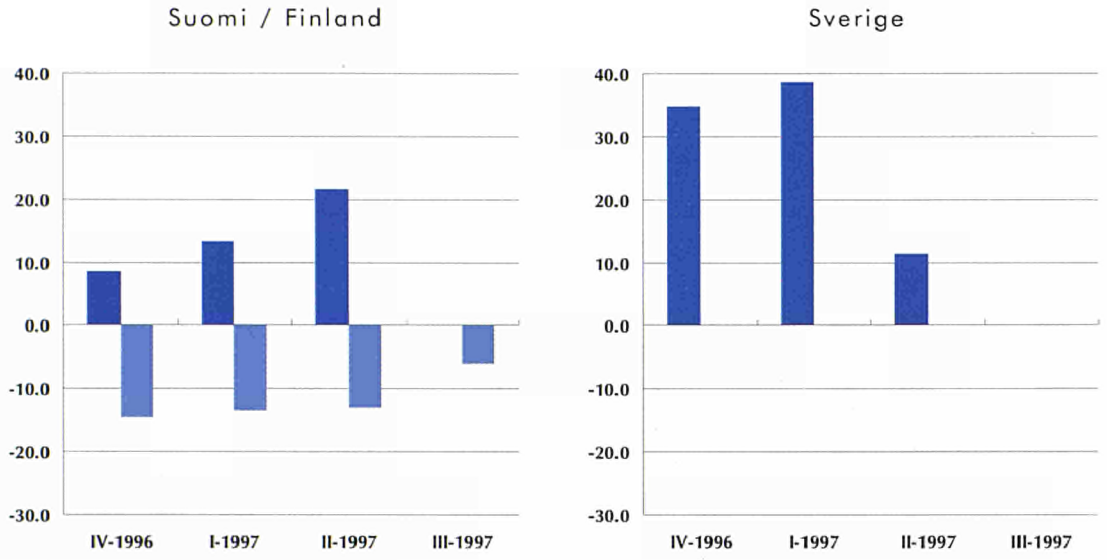
Annual growth rates for production and producer price indices, based on changes from the corresponding quarter of the previous year (%)

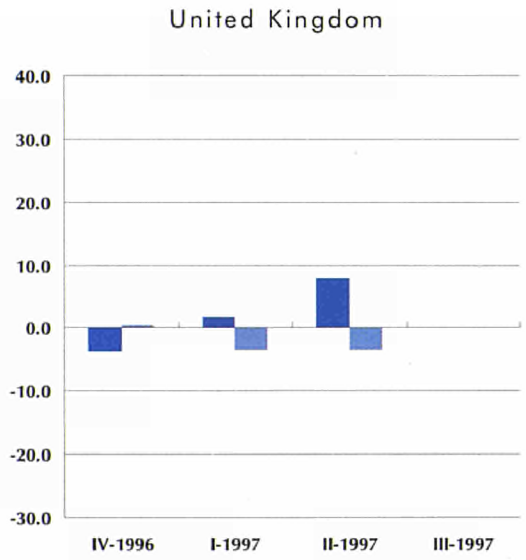


Source: eurostat

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

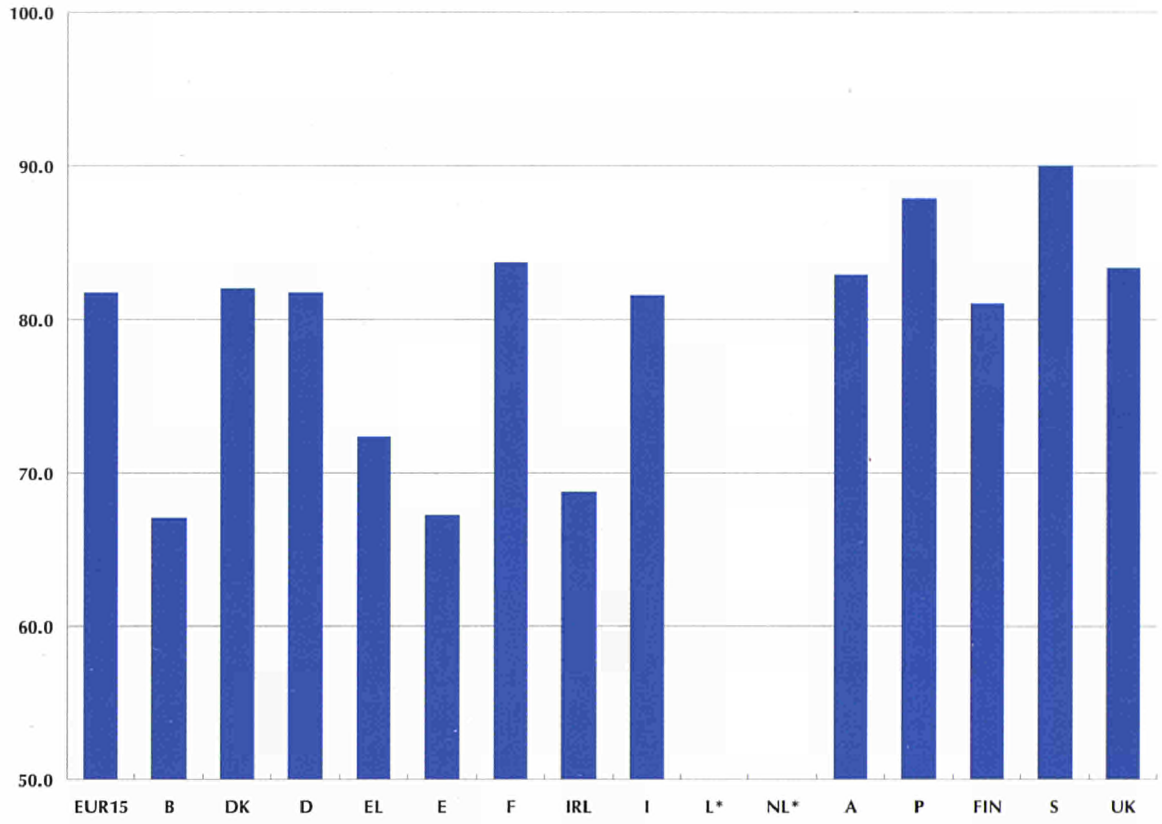
Further information - the production and producer price indices:

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, Finland, Sweden and the United Kingdom, the indices are adjusted by the national statistical offices themselves. For Germany, the trend and seasonally adjusted figures are calculated by the German NSO. 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, July-97 (%)



Source: DG II, Business Survey

Table 3.8

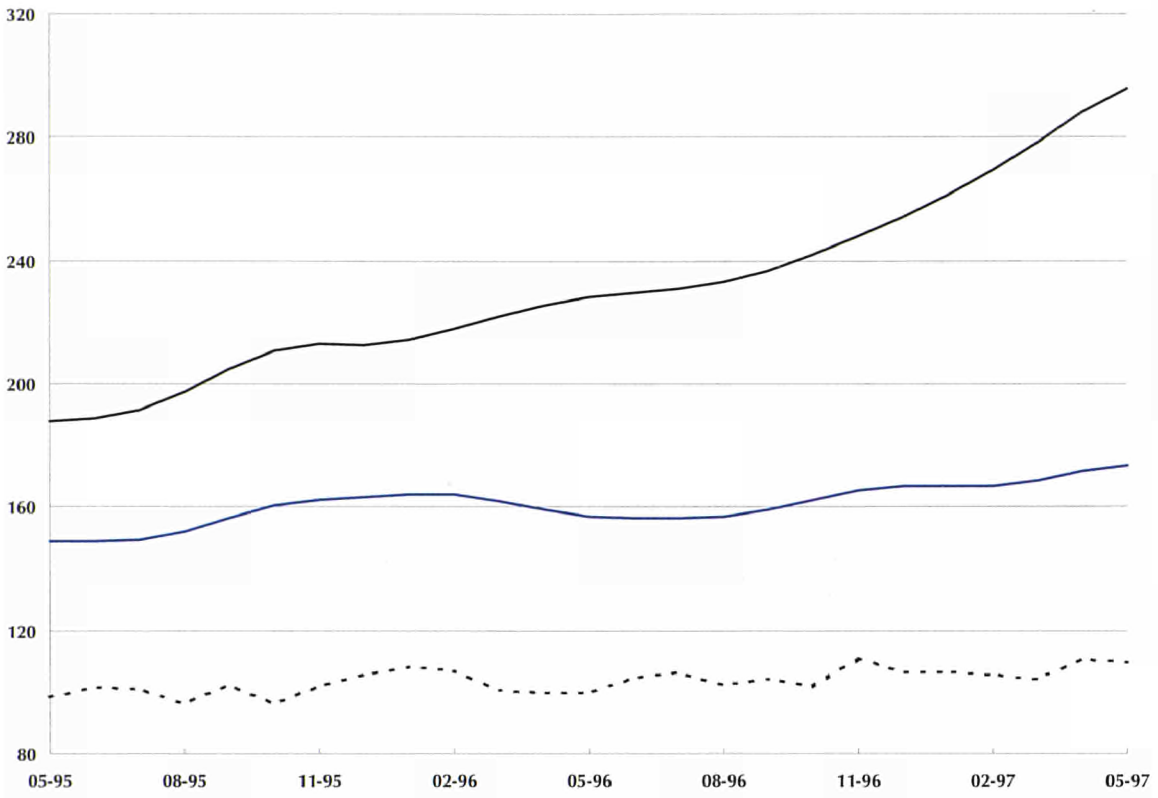
Capacity utilisation rates (%)

Growth rate: latest month, t / t-12 (%)	10-96	01-97	04-97	07-97
EUR15	-0.4	82.1	80.7	81.6	81.7
B	-9.7	78.7	67.7	66.8	67.0
DK	1.2	82.0	80.0	76.0	82.0
D	5.7	79.1	79.1	80.9	81.7
EL	0.6	71.7	82.3	70.0	72.3
E	-19.8	77.7	70.2	77.1	67.2
F	-8.7	88.8	87.6	83.4	83.7
IRL	-8.0	81.9	84.1	70.0	68.7
I	0.4	83.0	73.3	76.9	81.5
L	:	:	:	:	:
NL	:	:	:	:	:
A	4.0	84.0	81.8	82.9	82.9
P	:	:	79.5	88.0	87.8
FIN	17.4	80.0	76.5	74.8	81.0
S	2.3	89.0	92.0	80.0	90.0
UK	-3.5	82.1	80.6	84.8	83.3

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

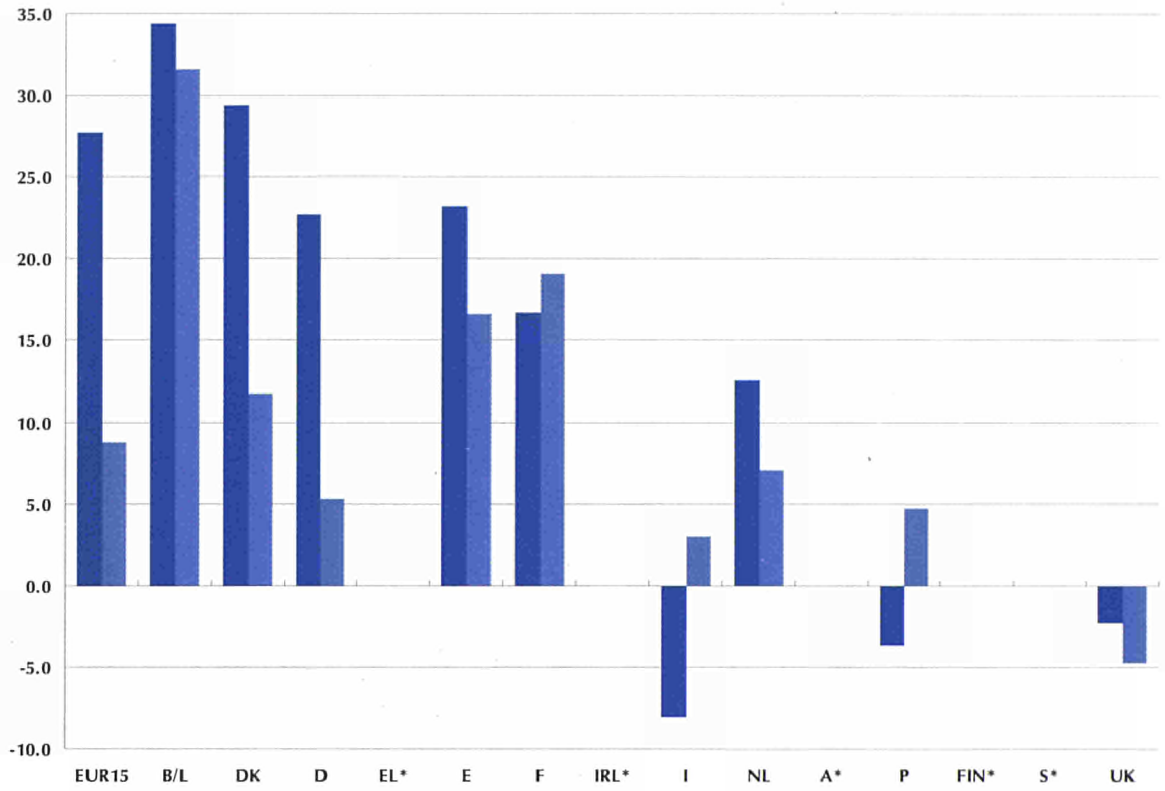
	Latest 3 months available			Exports Value	Exports Volume	Imports Value	Imports Volume	Terms of trade
EUR15	03-97	⇨	05-97	9.9	4.0	2.6	2.1	1.9
B / L	03-97	⇨	05-97	5.8	4.3	6.2	6.8	9.1
DK	03-97	⇨	05-97	11.0	9.1	5.0	4.0	0.1
D	03-97	⇨	05-97	5.7	4.4	2.9	3.4	-0.8
EL		⇨		:	:	:	:	:
E	03-97	⇨	05-97	5.0	3.6	1.1	-2.0	3.9
F	03-97	⇨	05-97	3.9	4.2	4.8	3.0	-1.1
IRL	02-97	⇨	04-97	1.7	11.8	-2.8	-2.8	-27.2
I	03-97	⇨	05-97	-1.6	-1.8	3.5	5.3	0.1
NL	03-97	⇨	05-97	-0.9	-5.6	:	-5.4	-9.4
A		⇨		:	:	:	:	:
P	03-97	⇨	05-97	0.0	3.5	1.8	4.7	-0.8
FIN		⇨		:	:	:	:	:
S		⇨		:	:	:	:	:
UK	03-97	⇨	05-97	1.1	-0.3	-0.8	-1.7	3.6

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, Mar-97 to May-97 (%)



Export value

Import value

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	03-97	⇨	05-97	27.7	17.2	8.8	7.9	8.0
B / L	03-97	⇨	05-97	34.4	34.6	31.6	32.4	1.0
DK	03-97	⇨	05-97	29.4	20.1	11.7	7.9	4.2
D	03-97	⇨	05-97	22.8	18.9	5.3	7.6	5.6
EL		⇨		:	:	:	:	:
E	03-97	⇨	05-97	23.3	20.9	16.6	-0.5	-13.0
F	03-97	⇨	05-97	16.8	27.8	19.1	15.6	-11.0
IRL	02-97	⇨	04-97	10.2	77.6	-4.7	1.8	-35.3
I	03-97	⇨	05-97	-8.0	-6.1	3.0	15.7	9.7
NL	03-97	⇨	05-97	12.6	15.9	7.1	4.3	-4.9
A		⇨		:	:	:	:	:
P	03-97	⇨	05-97	-3.7	8.6	4.7	8.4	-8.3
FIN		⇨		:	:	:	:	:
S		⇨		:	:	:	:	:
UK	03-97	⇨	05-97	-2.3	-3.4	-4.7	-2.6	3.4

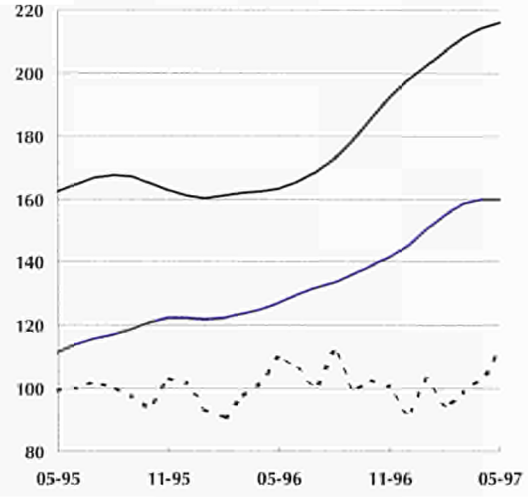
Source: eurostat

FOREIGN TRADE INDICES - TREND CYCLE

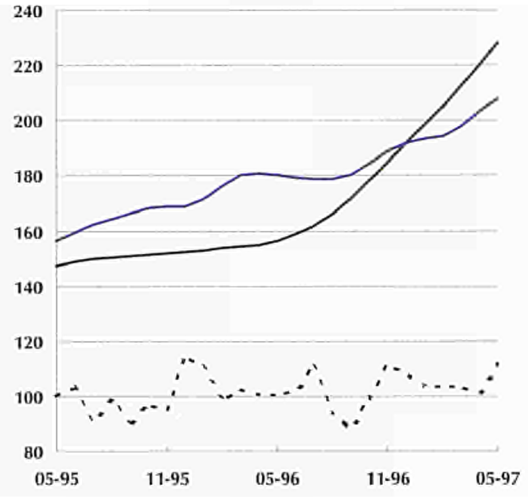
Figure 3.16

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

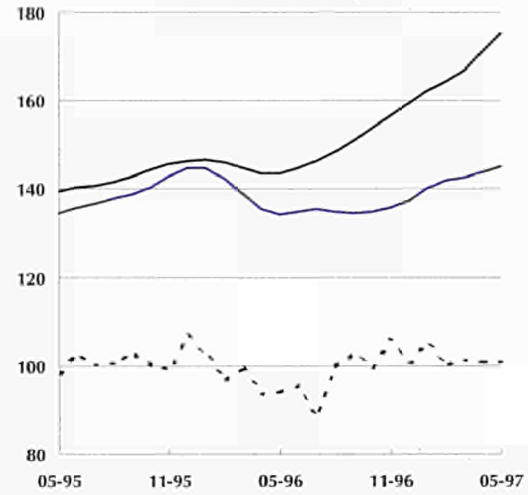
Belgique / België, Luxembourg



Danmark



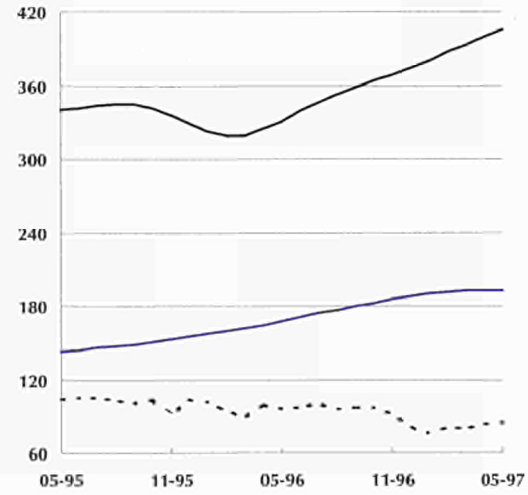
Deutschland



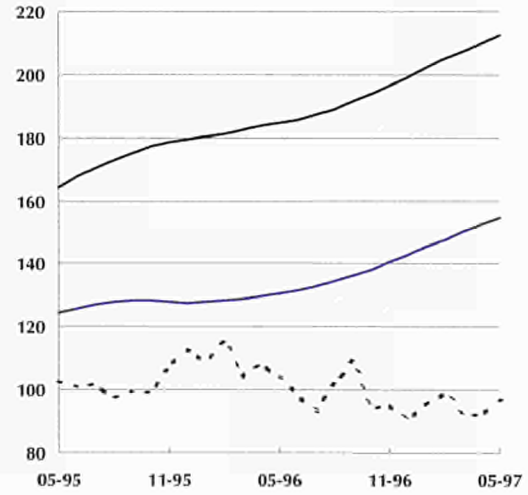
Ellada

Not available

España



France



Export value index

Import value index

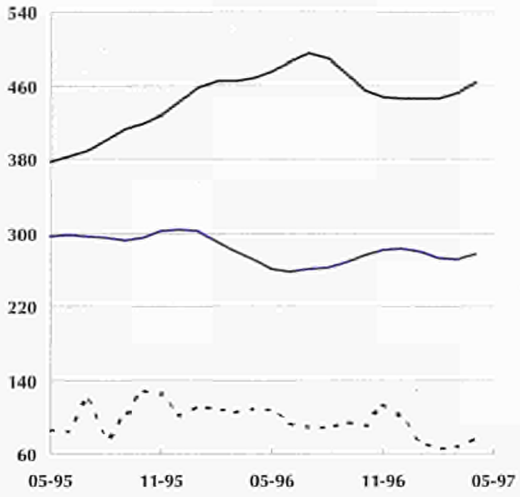
Terms of trade

Source: eurostat

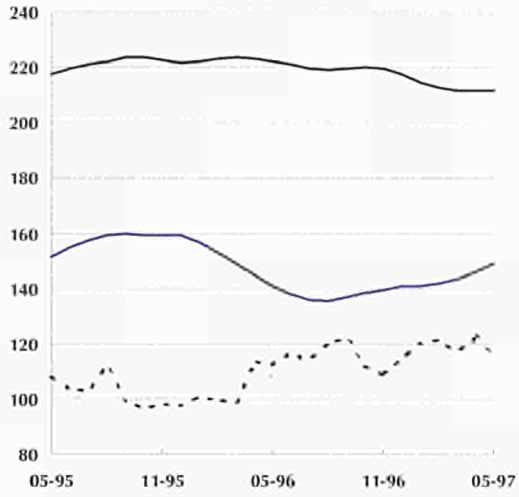
Figure 3.16

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

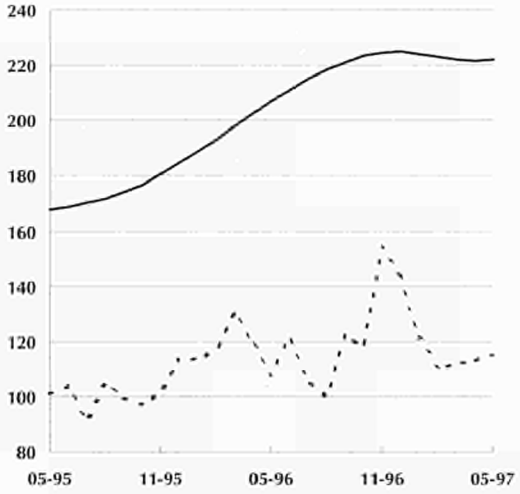
Ireland



Italia



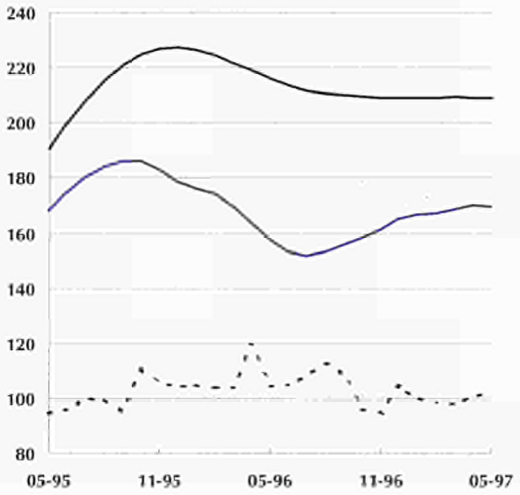
Nederland



Österreich

Not available

Portugal



Suomi / Finland

Not available

Export value index ——

Import value index ——

Terms of trade - - - - -

Source: eurostat

eurostat

FOREIGN TRADE INDICES - TREND CYCLE

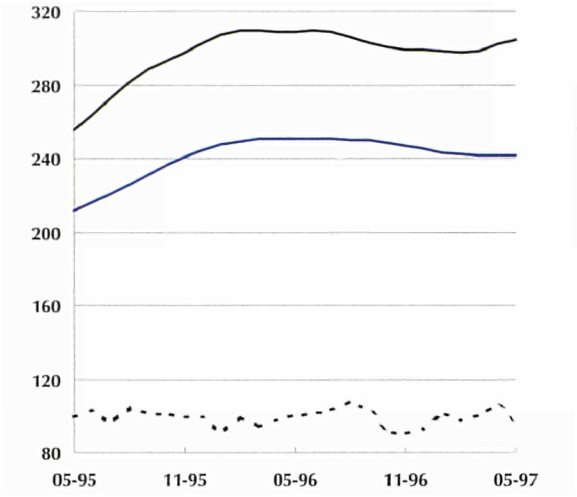
Figure 3.16

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 particular industry. The files have the following format: country, indicator, branch, periodicity, datatype, flag, 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 MPEI1.EXE (English number format) or MPEI2.EXE (continental European number format) 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 (MPEI1.EXE or MPEI2.EXE) and press <ENTER>, the files will self-extract and be placed in the same directory as the EXE file.

4. The files are simple, plain text files, with the .TXT extension. The files are semi-colon 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 Consumer Goods Industry
B0070 Non-Durable Consumer 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 Products, 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

5 Methodological notes

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. Main industrial groupings 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

If Member States dispose of more detailed data series at the 4 digit level of NACE Rev.1, a more elaborate definition at this level of disaggregation is used.

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 European Union business surveys.
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.

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, Finland, Sweden and the United Kingdom the indices are seasonally adjusted by the national statistical office. For Germany, the trend and seasonally adjusted figures for the production index are calculated by the national statistical office. Otherwise, Eurostat calculates the trend cycle, i.e. seasonally adjusted series, where additionally the irregular fluctuations have been excluded (using the program TRAMO / SEATS).

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 5 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

In this section

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The Commission wishes to acknowledge the many valuable ideas and suggestions supplied by EITO (European Information Technology Observatory) during the writing of this text.

The size of the European market

The aim here is to compare the IT market with other branches of industry, other telecommunications activities and other international competitors.

The total IT and telecommunications market (industrial activities and services) amounted to ECU 295.7 billion in 1996. If Norway and Switzerland are included, the figure is ECU 315 billion.

These activities contributed 4.4% of GDP in both EUR15 and EUR15+ (including Norway and Switzerland). If services are excluded, leaving only the purely industrial component, the IT and telecommunications industry accounted for more or less the same percentage, 4.7%, of the output of manufacturing industry in 1996 (3.0% of this being telecommunications and 1.7% information technology).

Taken together, all the different IT activities (office equipment, EDPs, software, professional services, network services, maintenance of computer hardware and support) accounted for nearly ECU 138 billion, while for telecommunications the total figure came to more than ECU 157 billion.

The growth rate for the total IT market was 7.2% in 1996 (with rates of 6.4% for information technology and 7.9% for telecommunications). In terms of world consumption, Europe's share of the various markets was 29.9% for the total, 28.3% for information technology and 31.1% for telecommunications.

Breakdown by country

A closer look at the figures for the EU countries shows that, for these industries taken together, the highest growth rates between 1995 and 1996 were in Greece (10.4%), Portugal (12.5%) and Austria (8.4%). For telecommunications, there was strong growth in other countries such as France (9.1%) and Italy (9.5%), and for the information technologies in Finland (8.5%) and Spain (8.2%).

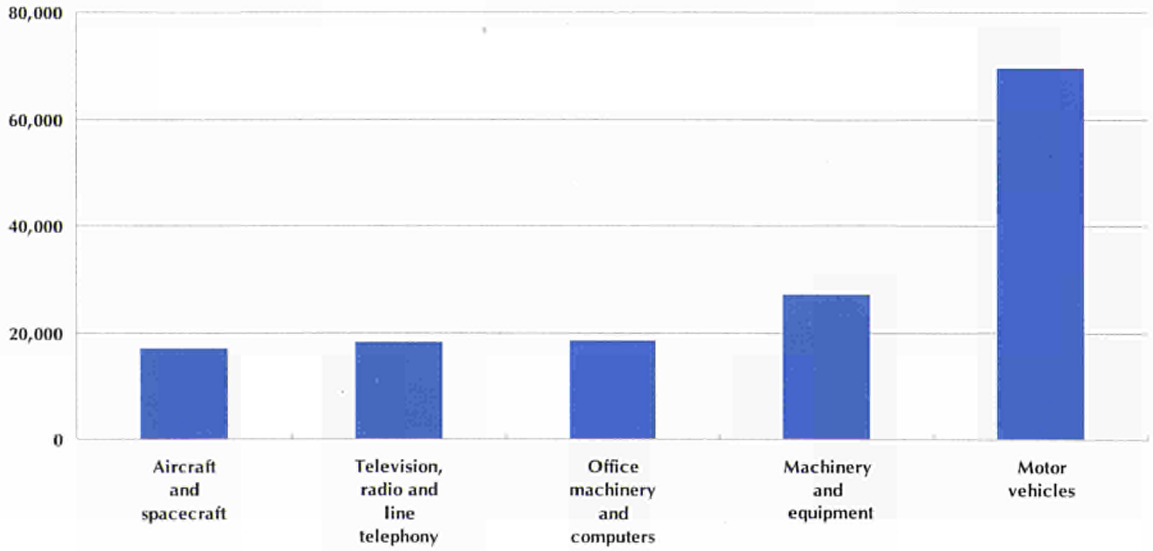
Germany had 5.7% growth in IT activities. The adoption of new technologies accelerated in terms of both hardware and software. The German hardware industry continued to switch to low-cost multiple-user systems, with firms rather than individuals keeping the market buoyant. The software market should follow the same trend as the market for PCs: more and more people are likely to buy Windows 95 (or future Windows releases), while the market for problem-solving software is growing strongly.

The United Kingdom had one of the highest growth rates for information technology, at 7.9% in 1996. As a result of an improved economic situation and sustained demand, both national and inward investment increased. The British market for PCs was stimulated by a retail distribution system which is relatively dynamic and advanced in its approach to both business and individuals. New entrants or new groupings amongst operators in the distribution sector, as well as new sales formulas, (e.g. "rent-to-buy"), have increased the level of competition and the quality of the products and services available. With the PC market in full growth, the software market is also buoyant, driven mainly by applications with more advanced functions.

In the other countries, such as France and Italy, there is renewed and increasing growth. In most countries concern about the millennium time-bomb is resulting in strong demand for conversion packages.

The future for telecommunications looks promising, since the high growth rates are expected to last for the next five years. Competition in the market has increased in Germany, while new forces have come into play in France. The United Kingdom has the least regulated (or most deregulated) market, compared with Italy, where strong growth is continuing but deregulation is making slow progress. The most marked feature of the other countries is to be found in the Scandinavian countries, where penetration of mobile telephony and voice lines is amongst the highest in Europe. In terms of industrial production, Sweden and Finland are more specialised in telecommunications than the OECD average; Sweden also stands out in terms of information technology.

Figure 6.1

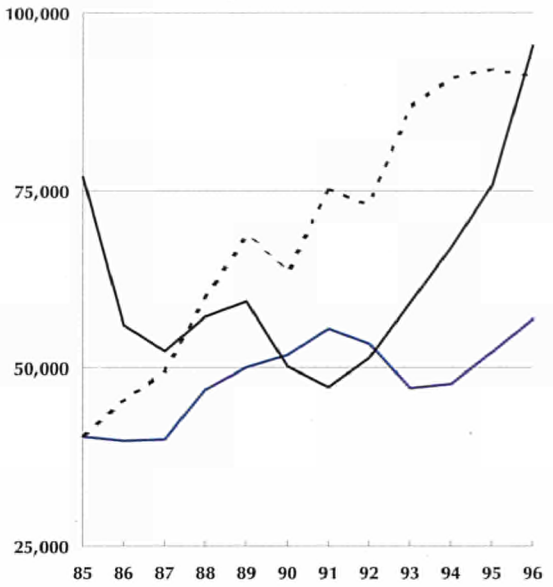


Value added in relation to that of other industries, 1996 (million ECU)

Source: DEBA GEIE

Figure 6.2

International comparison of output (million ECU)



EUR15 ——
Japan - - - - -
United States ——

Source: DEBA GEIE

Market for products and services

A look at the markets by product shows that growth in the market for PCs was predominant in 1996 in terms of computer hardware. However, the total IT market was dominated by software, which enjoyed an enormous boom. IT services were dominated by business and network services.

Some areas of strategic importance can be distinguished in telecommunications. These include:

- ★ digital and wireless mobile telephony;
- ★ transmission via fibre-optic cables;
- ★ microwave technology;
- ★ high-capacity routers;
- ★ broad-band communications networks for rapid data transmission;
- ★ telecommunications management systems for different types of network.

The dynamism of the new technologies and the growth in telecommunications services are the two driving forces behind the telecommunications market.

Table 6.1

IT and telecommunications markets, 1996 (million ECU)

	Total IT	Computer and datacom hardware	Office equipment	Software	Services	Hardware maintenance and support	Total telecom-munications	Telecom-munication equipment	Telecom-munication services
EUR15	138,405	54,223	7,588	28,865	33,916	13,813	157,301	26,964	130,337
B/L	4,847	1,674	245	1,312	1,000	616	4,424	568	3,856
DK	3,882	1,539	159	574	1,341	269	2,903	473	2,430
D	39,825	17,227	2,056	9,668	7,661	3,213	42,070	7,526	34,544
EL	583	261	86	99	99	38	2,386	369	2,017
E	5,579	2,441	458	1,123	863	694	11,293	1,611	9,682
F	25,751	8,654	1,368	4,524	8,146	3,059	26,697	4,619	22,078
IRL	815	333	126	143	141	72	1,748	298	1,450
I	12,520	4,269	711	2,419	3,684	1,437	20,704	3,398	17,306
NL	8,700	3,137	579	2,065	2,065	854	7,925	1,307	6,618
A	3,428	1,370	141	754	762	401	3,450	531	2,919
P	934	483	104	143	123	81	2,754	499	2,255
FIN	2,358	1,023	96	355	706	178	2,153	483	1,670
S	5,937	2,273	204	839	2,145	476	5,496	1,150	4,346
UK	23,246	9,539	1,255	4,847	5,180	2,425	23,298	4,132	19,166
N	3,030	1,203	107	452	1,018	250	2,527	498	2,029
CH	7,110	2,466	196	1,830	1,773	845	6,944	1,225	5,719

Source: EITO '97

eurostat

Driving forces in the IT market

This part gives a brief analysis of the various forces involved in the IT market and sets out their different components.

The activities relating to IT and telecommunications play a crucial role in the globalisation and consumerisation of business. A market study has established at European level that, after political stability and the availability of skilled labour, telecommunications technology and infrastructures and IT are key factors in the success of global expansion. The technologies contributing most to this trend are as follows:

- ★ Internet/Intranet;
- ★ the competitive advantage offered by IT and telecommunications in the modern business world;
- ★ the consumerisation of IT;
- ★ the fusion of telecommunications and computer applications;
- ★ the availability of communication bands of almost unlimited width.

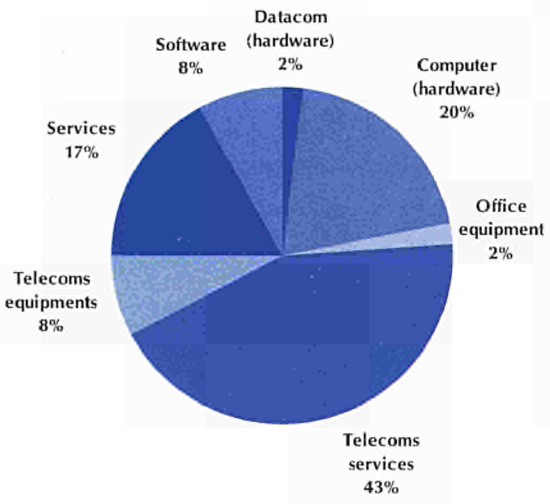


Figure 6.3

World market for IT and telecommunications, 1996 (%)

Source: EITO '97

It is possible to distinguish driving forces affecting the different IT and telecommunications markets:

- ★ Internet;
- ★ the consumers' trend towards information technology;
- ★ IT businesses.

Internet

The most significant factor in the growth of the total market for IT and telecommunications is the Internet, and more specifically the role of the Internet in present-day society. The Internet is a catalyst and hence the market's main engine, its growth pulling the market in its wake.

Business are facing challenges on a quite different scale on the Internet, since communications and information management are the cornerstones of competition in the global market. New management concepts, such as Internet banking, are therefore emerging.

Large concerns have new needs which pose problems which not always been solved, e.g.:

- ★ the need for more bandwidth;
- ★ information overload;
- ★ the lack of adequate standards for the EDI interfaces (EDT, electronic data transfer).

Nor should one forget, at the level of the individual business, the Internet's little brother - the Intranet, which offers the same services as its elder brother to smaller entities. It is in fact an in-house Internet which can sometimes reach an impressive size.

Consumers

Another driving force behind the market is consumer enthusiasm for information technology. This situation opens up a whole range of opportunities for information providers.

Consumers can be divided into networked consumers and others. Amongst the former, one can further distinguish between two very different target groups - private users (at home) and professional users. The needs of these two groups are very different in terms of both services and infrastructures.

The reasons why individuals get into the world of the Internet may vary widely, but they frequently involve child or adult education, job requirements, searching for work or telework (both at home and on certain "other premises").

However, many people's experience of the Internet has been unfortunate or frustrating: it is a rapidly changing environment, user-unfriendly and involves an expensive interface system, etc. The reason for not using the Internet is very often a lack of awareness of its usefulness.

The new technologies, whose development and growth are already playing - and will subsequently continue to play - an increasingly important role in this market, concern the systems for accessing the network and protecting access, the programming languages for applications or tools for developing the Internet, search and navigation, electronic transactions, telecommunications and payments via the Internet.

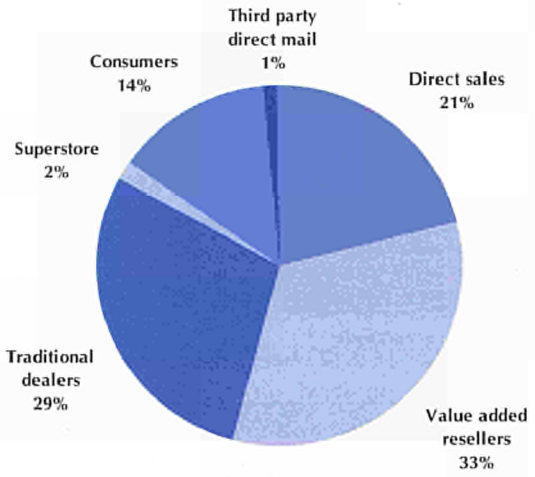
IT businesses

Finally, the last driving force in the market, which we shall broach briefly, is the totality of IT businesses. These are having to face up to new challenges posed by the market in which they operate, such as:

- ★ differentiating their products from those of their competitors;
- ★ concentrating on the products for which they have a comparative advantage and subcontracting the others;
- ★ speeding up their adaptability to rapid changes in the market;
- ★ finding new brand and marketing strategies.

IT businesses have two types of customer to satisfy: the professional or business user (through increasingly rapid product innovation, increased production efficiency or improved user support), and the individual (who represents a highly fragmented and culturally diverse market).

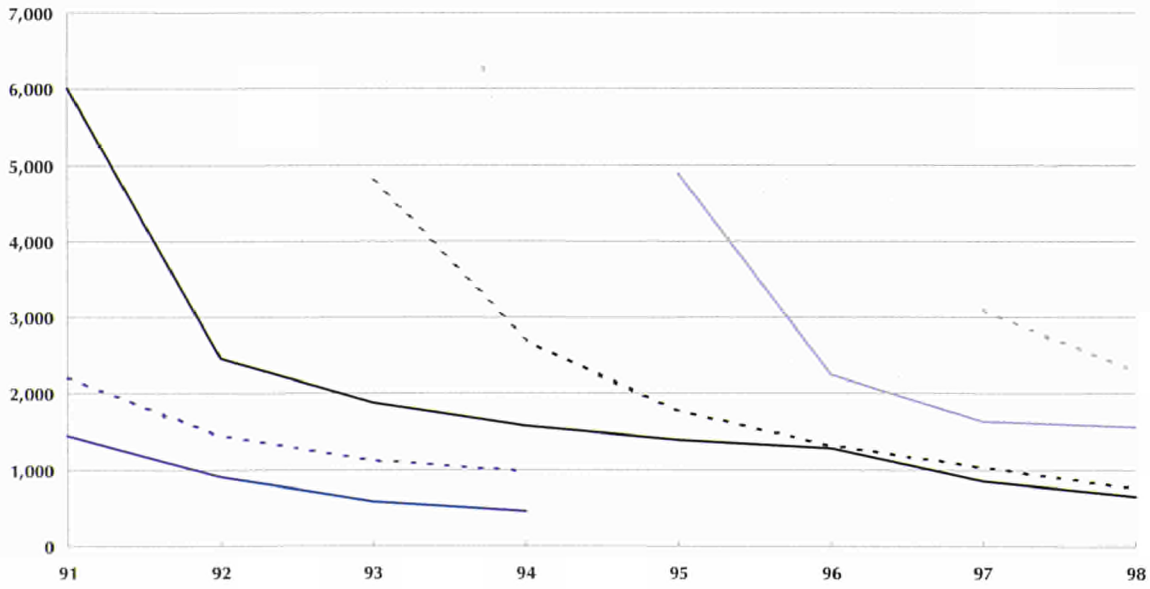
Figure 6.4



Market for PCs in Europe, 1995 (%)

Source: EITO '97

Figure 6.5



Price trends for PCs in Europe (ECU)

286
386SX
486DX
Pentium <100MHz
Pentium-Pro
P7

Source: EITO '97

Table 6.2

Software market, 1995

	Worldwide market size (Billion ECU)	1995 (%)
Consumer applications (used in the home for recreation, education, and/or personal productivity enhancement)	1.5	2.0
Cross-industry applications (address problems such as office automation and accounting)	15.9	21.1
Vertical-industry applications (address problems that are unique to a particular industry, such as manufacturing or health care)	16.4	21.7
Information access tools (end-user oriented tools for ad hoc data access, analysis, and reporting)	4.7	6.3
Programmer development tools (support the professional developer in the design, development, and implementation of a variety of software systems and solutions)	16.4	21.7
Systems management software (used to manage the full range of computing resources)	5.4	7.2
Opening systems (the machine-level instructions that operate CPUs and networks)	9.5	12.6
Utilities/middleware (enabling application and user interoperating and communication, system utilities, and distributed object management)	5.6	7.4
Software market	75.4	100.0

Source: EITO '97

Impact of the Internet on the development of EDPs

Internet, Intranet and multimedia applications are the driving force behind the development of EDPs (electronic data processors). New concepts ("slim" client or web server) are appearing and leading to the creation of new products capable of managing multimedia and providing access to telecommunications services. Moreover, multimedia functions and the high transmission speeds require increasing data processing and storage capacities.

The impact of these driving forces has not always been the same in the different segments of the market.

In the case of small-, medium- and large-scale systems there is a move away from the traditional "mainframe" concept to the concept of the "large server" which in fact plays the same role as a web server.

With PCs, the move is towards a more web-oriented design, and this is leading to new types of client: the classic PC user remains representative of the largest segment of information technology. However, a new type of user has emerged, "slimmer" in the sense that his needs are focused less on the capacity of the PC as such than on its capacity as a tool for accessing the web. This has led to the marketing of the "NC" (network computer), the "NetPC" and the "Network Station" - small, cheap and easy-to-use computers.

In the case of information processing and storage, hard disk capacity is growing by some 60% per year, i.e. their capacity will have increased tenfold over five years. According to the specialists, this rate of growth in capacity should continue in the next century. The DVD (digital video disk) is another product which has appeared in the wake of the Internet and its requirements in terms of data storage and access and transmission speeds.

Impact of the Internet on software technology

This point tackles the trend in software on the European market from the same angle as the previous point.

The impact of the Internet is of course even more evident in the case of software in which innovation is very intense and may sometimes derive from tools peripheral to the Internet, such as graphic or network browsers.

The innovation launched by the Internet phenomenon concerns both software/utilities and applications tools. The fields most conducive to innovation are, for instance:

- ★ multimedia on the web and in dynamic pages capable of managing Quicktime, Jpeg, AVI files;
- ★ the use of subject-oriented technologies and the development of subject and web-oriented databases;
- ★ the use of visual development environments;
- ★ the introduction of light-weight operating systems for "slim" clients (or NOS, network operating systems);
- ★ changing from a "static" web page to a "dynamic" web page".

There are other tendencies linked to the Internet, such as the trend towards mergers between system and network operators, and the Internet's influence even extends to programming languages and databases.

A brief history of electronic commerce

Some people think that EDI (Electronic Data Interchange) is the oldest technology for electronic trade, since it is a method of sending structured messages from one business to another.

In the 1970s, some British retailers joined forces to develop ad hoc standards for the presentation of invoices which they exchanged on magnetic tape. Their work resulted in the Tradacom standards for EDI. The first EDI network — Tradanet, using the Tradacom standards — was born at the start of the 1980s.

There are currently several international standards competing on the market:

- ★ ANSI (ASC) X.12;
- ★ EDIFACT (EDI for Administration, Commerce and Transport), a joint project of the ISO (International Standards Organisation) and the UNECE (United Nations Economic Commission for Europe);
- ★ UN/GTDI (United Nations Guidelines for Trade Data Interchange) based on Tradacoms.

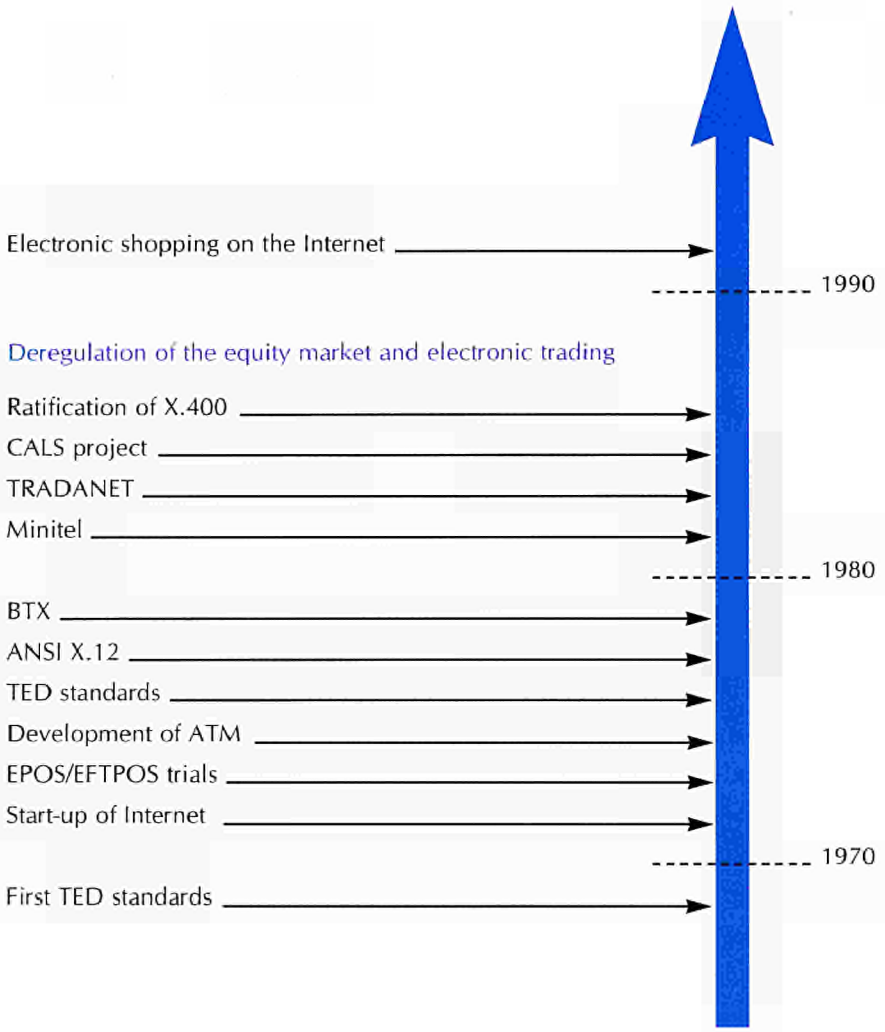
There are other standards specific to particular industries, such as Odette for the automobile industry, but the best-known is SWIFT, which is the largest financial communication network.

In the 1980s, a US Department of Defense project, CALS (Computer-Aided Acquisition and Logistic Support), was initially used only by the military, but the experience gained from it allowed civilians to exchange their information more efficiently (one simple example is the HTML language used on the web, which is largely based on the SGML developed under the CALS project).

In 1984 the ISO adopted the X.400 standard for electronic mail. Several network operators adopted it, as well as some electronic mail providers.

Figure 6.6

History of electronic commerce



Source: EITO '97

ATM (Automated Telling Machines) are automatic counting devices which began to appear at the end of the 1970s and provide users with useful information and cash.

EPOS (electronic point-of-sale) and EFTPOS (electronic funds transfer at point-of-sale) allow information to be collected on consumers' purchases and provide customers with a wider range of methods of payment.

Videotext services were developed at the end of the 1970s and in the early 1980s. France's Minitel was the most successful, while German had its BTX. Minitel was the first on-line system of services offering visual information and text via a VDU.

We have now reached the age of electronic shopping on the Internet.

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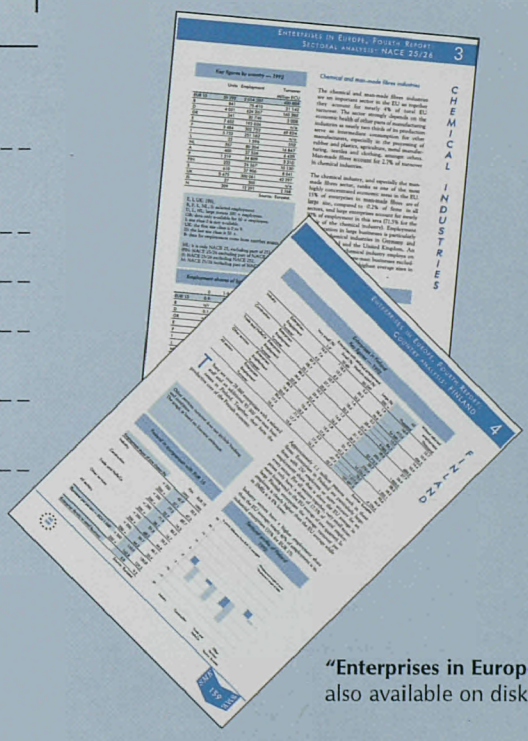

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