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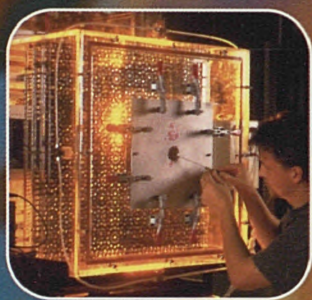
Monthly Panorama of European Industry



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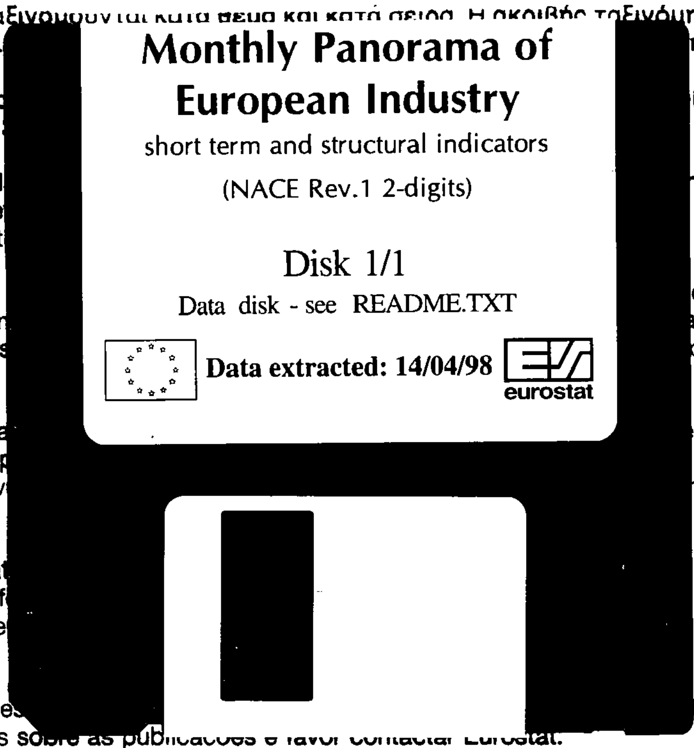

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Monthly Panorama of European Industry

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Theme 4
Energy and industry

Series B
Short-term statistics

Sent to press in April 1998

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

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Editorial

We welcome regular readers back from the Easter break. All short term statistics in this edition of the MPEI have two major changes that readers should be aware of. Using new estimations of country weights from the annual survey for the year 1995, the EU-15 aggregates have been re-calculated. Furthermore, all indicators in this edition of the MPEI see a switch in the base year to 1995 = 100. These changes have led to some modifications in the published series. Longer time series for EU-15 can be obtained from us on request.

The publication has data for January 1998. Industrial production in the EU rose by 0.8% in the three months to January (when compared to the three month period before). This apparent slowing down of the European industrial economy has now been in evidence since the summer of 1997. Nevertheless, industrial output is still growing at an encouraging rate - when compared to a year ago (up by 4.5%). In the other two main industrial economies there was a somewhat contrasting picture - with American production up by 1.4%, whilst in Japan there was a decline of 1.7% in output (again figures for January).

Producer price growth has remained moderate in the EU over recent months - recording growth of 0.7% in January 1998 (when compared to data for a year before). Rates below the European average were recorded in France, Germany and Spain.

The second half of this issue is devoted to the food, drink and tobacco industry (NACE Revision 1 15 and 16). The industry has a constant pattern of demand. Nevertheless, different patterns of industrial structure have developed across the EU in recent years. In the northern countries the tendency has been for a proliferation in market concentration, characterised by merger activity and brand specialisation. This form of structural change may be contrasted with the importance of family and small & medium-sized enterprises found elsewhere in the EU.

The final article looks at the beer industry. It examines the stagnation of the European market - despite the attempts of manufacturers to diversify product lines to stimulate consumption. The traditional beer drinking countries have all seen their consumption per capita decline in recent years - indeed, the only markets with a positive trend have been those around the Mediterranean.

Pedro Díaz Muñoz,
Luxembourg

Latest outlook - the most recent short-term indicators for European industry in tabular and graphic format, page 7

In depth - a close look into the food, drink and tobacco industry, page 51

Special focus - a feature on the beer industry in the European Union, page 77

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 an industry. 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, up to six of which are planned for 1998.

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.

Next issue:
Non metallic mineral products

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1. Total industry

1. Total industry

The quarter-on-quarter trend in the production index for industry as a whole

The trend in the EU-15 production index for manufacturing over the last quarter compared with the preceding three months shows a quarterly growth rate of 0.8% in January 1998, representing a fall of 0.1 percentage points compared with the previous month. After a fall in the industrial production index in early 1996 (between February and May), production picked up again in summer 1996, with growth rates of around 0.5% per quarter. Growth accelerated after January 1997, peaking at 1.4% in May and June. However, the growth rate of production has since slowed slightly by about 0.1 percentage points per month, falling below the one-percent mark at the end of last year. In January 1998, the growth rate of the trend in manufacturing output was higher than the Community average in Sweden (1.6%), France (1.3%) and Germany (0.9%). It was the same as the Community average in Spain and below average in Italy (0.7%) and the United Kingdom (-0.3%).

Slower growth at the end of 1997

Of the larger Member States, Germany saw fairly steady growth of around 1.0% in 1997. However, this slowed slightly in December, the only month of the year when the growth rate fell below the 1% mark. This trend appears to be confirmed by the January figure of 0.9%. Whereas the trend in industrial production stagnated in France between November 1996 and January 1997, growth picked up in the winter, rising to 1.6% in April. It remained at this level (varying between 1.5% and 1.8%) until the end of the year. January 1998 appeared, however, to mark a change, with a 0.3 percentage piont fall in the growth rate to 1.3%. After a fall in industrial production between February 1996 and January 1997, positive growth rates re-emerged in Italy in February 1997 (0.1%), rapidly reaching 1.9% in May. However, the production growth rate has since continued to decline, remaining at 0.6% and 0.7% between November 1997 and January 1998, the last months for which data were available. The growth in industrial production was, by contrast, fairly unremarkable in the United Kingdom. For two years, the United Kingdom has not seen rates of over 1.0%, the maximum over this period being in the winter of 1996-97, with 0.9% growth over one quarter. Although growth rates for production became positive again after a month of decline in May 1997 (-0.1%), the change has nevertheless been slow, with negative rates again since November 1997 for the last three available months to January 1998 (-0.3%). In line with the overall EU trend, the countries of the Iberian peninsula have seen the growth of industrial production slow since last autumn. In January 1998, growth was 0.8% in Spain whilst in December 1997 it was 1.1% in Portugal. Finally, the countries of northern Europe seem less affected by this

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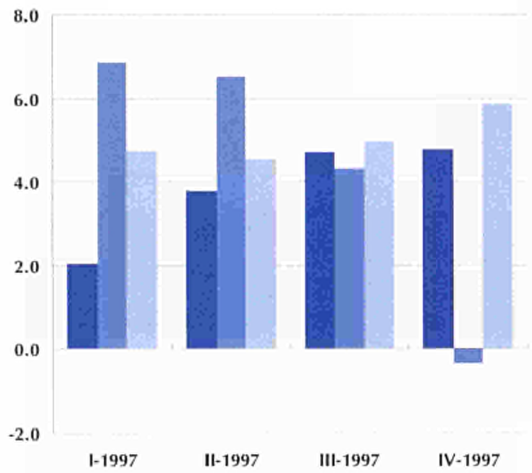
trend, recording considerable growth rates in January 1998: 1.8% in Denmark, 1.6% in Sweden and 3.1% in Finland (in December 1997).

In Japan, after a growth rate in industrial production of over 2.0% at the beginning of 1997 (2.4% in January, for example), production has slowed continuously, the trend even becoming negative last September with a rate of -0.5%. The situation has since deteriorated even further, and the most recent data shows a 1.7% fall in the total manufacturing production index in January 1998, i.e. the same figure as in December 1997.

The situation in the USA is completely different, as the country showed a growth rate of 1.4% in January 1998, which represents an increase - albeit slight - over last summer. Since January 1997, all growth rates in the USA have been over 1.0%.

Figure 1.1



EU-15 Japan USA

Industrial production: growth rate, year on year (%)

Source: eurostat

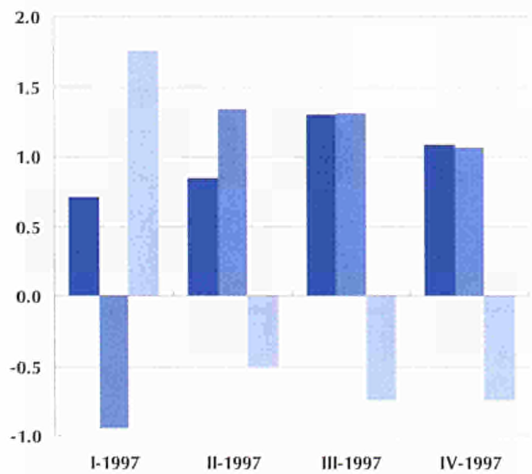
In January 1998, inflation of the price index of manufactured products was above the Community average in Italy (1.3%), the Netherlands (1.3%) and Finland (1.8%, December 1997). By contrast, it was below average in the United Kingdom (0.5%) and Spain (0.6%). Inflation was below zero in France (-0.2%) and equal to zero in Ireland.

The trend in the index of industrial producer prices for Germany since January 1997 shows an increase in inflation during the spring and summer and a fall in winter, with inflation dropping back to below 1.0% in January 1998. The prices of manufactured

Industrial prices rising in the EU and Japan but falling in the USA

The EU price index for manufacturing as a whole since January 1997 shows little change in inflation. Nevertheless, inflation did not remain static over the course of last year - it underwent considerable changes. After starting at 0.8% in January, it fell to 0.6% over the next three months. After June, it exceeded 1.0%, peaking at 1.4% in August. Finally, by January 1998, the last month for which data are available, inflation was at 0.7%.

Figure 1.2



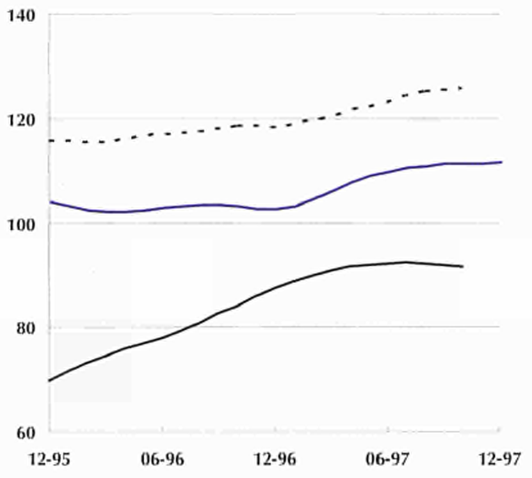
EU-15 Japan USA

Producer prices: growth rate, year on year (%)

Source: eurostat

Figure 1.3

New orders index (1995 = 100)



Source: eurostat

products were relatively stable in France, inflation varying between 0.0% and 0.6%, with the exception of negative figures in April 1997 (-0.3%) and January 1998 (-0.2%). Italy, by contrast, has seen increased inflation over the past year, industrial producer price inflation rose from 0.8% in February 1997 to 1.7% by August 1997, since then they have slowed to 1.3% by January 1998. Since July 1997, the producer price index in the United Kingdom has shown a fairly steady increase of around 0.6% per year, although early data for February 1998 suggests a rising trend (0.9% growth).

Finally, at an international level, Japan has seen the price of industrial products increase by 0.9% in the space of a year, whereas the USA has seen a 3.2% fall.

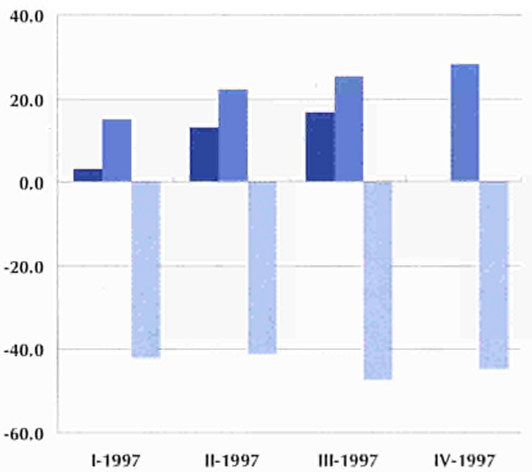
Trend in manufacturing output by industrial branch

In January 1998, the growth trend in the production index for intermediate goods over the previous three months compared with the preceding quarter was 1.2% for the EU. It has continued to fall since the early summer - in June 1997 it was 1.9%. The first six months of 1997 were particularly dynamic and saw the growth rate of production rise from 0.9% in January to 1.9% in June. In January 1998, growth in the intermediate goods branch was above the Community average in France, 1.7% and in Germany at 1.5%; by contrast, it was below the Community average in the Netherlands (0.4%, December 1997), the United Kingdom (0.2%) and Spain (0.0%). Growth in Germany was fairly steady throughout 1997, though there was a slight acceleration during the summer (1.9%). The trend in the production of intermediate goods in France was similar to that in Germany, though the year's start was much more restrained, with growth rates of 0.6% in January and 0.9% in February.

The trend in the production index for capital goods was less marked in the EU as a whole than for intermediate goods. In January 1998, growth in production for the previous three months compared with the preceding quarter was 0.8% for EU-15, compared with 2.0% in July 1997. However, output was higher than average in both Germany, at 1.0% - though this in itself marked a slow down - and France, at 2.0%. The trend has been erratic in Italy and almost negative in the United Kingdom, at -0.1% for the last two available months.

Figure 1.4

Quarterly trade balance - manufactured goods (billion ECU)



Source: eurostat

Industrial production (working day adjusted) & trade balance

There was an upward trend in the index for the production of consumer durables for EU-15 for most of 1997. During the first few months, the growth rate increased markedly, from -0.8% in January to 1.6% in April. Since then, it has fallen steadily, reaching 0.0% in October, November and December 1997. January 1998 saw little change in this trend, with production rising of 0.1%. However, with the exception of Italy, the largest Member States saw positive growth rates in January 1998, rates that were above the Community average. Germany, for example, recorded 0.3% (in both January and February), which is an accurate reflection of the trend over the past year. France and Spain recorded growth rates of 1.5% and 2.7% respectively.

Although the growth rate in the production of consumer non-durables has been positive since June 1996 for EU-15, it has been fairly sluggish, never exceeding 0.8%. In January 1998, it was 0.2% for the EU, 0.1% for Germany and 0.5% in the United Kingdom. Spain, France and Italy fared little better at 0.7%, 0.3% and 0.2% respectively.

Trend in industrial production per branch for the USA and Japan

In January 1998 the production index for intermediate goods showed a growth rate of 1.3% in the USA, whereas the equivalent figure for Japan was negative (-2.3%). Since September 1997, Japan has seen a fall in the production of capital goods, recording declines of the magnitude of 2.0% between November 1997 and January 1998. By contrast, the USA saw production rise steadily by around 1.9%. In terms of consumer durables, Japan saw a marked deterioration in production during 1997. From 2.4% in January of that year, the growth rate fell to -3.7% in October. The fall has since been less marked, even though January saw a reduction of 2.2%. At the same time, (i.e. January 1998), the USA recorded a high growth rate (equal to 2.4%). Finally, in the consumer non-durables sector, American output grew in January 1998 by 2.7%, no change on the previous month, whilst Japan's output continued to fall, by -0.8%, as in December.

Table 1.1

Industrial production: growth rate, year on year (%)

	EU-15	Japan	USA
02-97	2.8	5.8	4.4
03-97	1.8	7.2	4.7
04-97	5.3	4.8	5.5
05-97	2.2	7.8	4.3
06-97	3.8	7.0	3.8
07-97	5.7	4.9	5.1
08-97	4.3	4.7	5.0
09-97	4.1	3.3	4.8
10-97	5.4	1.6	5.8
11-97	4.4	-0.7	5.7
12-97	4.4	-2.0	6.0
01-98	4.5	-2.5	5.3

Source: eurostat

Table 1.2

Monthly trade balance - manufactured goods (billion ECU)

	EU-15	Japan	USA
01-97	-2.9	1.6	-14.9
02-97	2.5	6.1	-14.4
03-97	3.4	7.3	-12.9
04-97	2.9	7.0	-13.6
05-97	4.4	6.8	-14.2
06-97	5.6	8.4	-13.4
07-97	10.0	8.3	-15.2
08-97	3.2	7.1	-15.4
09-97	3.4	9.6	-16.9
10-97	6.6	9.4	-15.2
11-97	4.2	8.8	-13.8
12-97	:	9.8	-15.9

Source: eurostat

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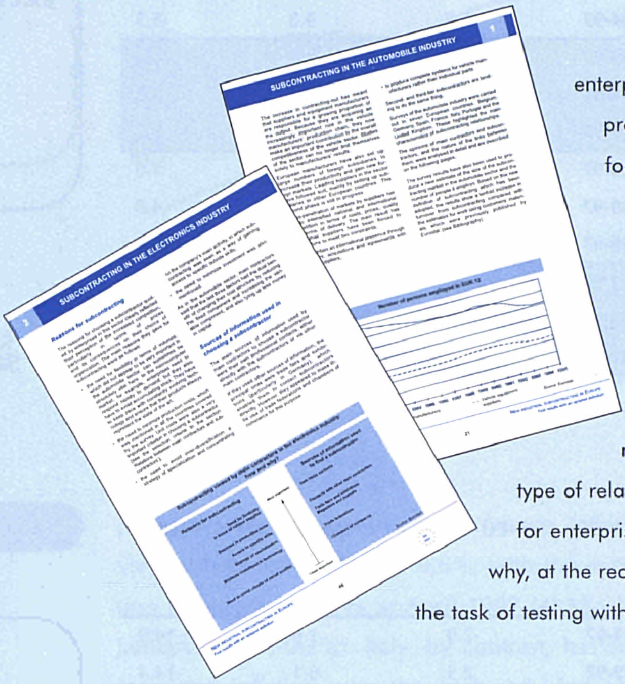

New industrial sub-contracting in Europe

Within a context of increased international competition, European enterprises have been forced to restructure and to outsource a number of production functions. Recourse to subcontracting constitutes one of the forms of this outsourcing. However, subcontracting itself is evolving: in most cases, it is not restricted to the simple processing of materials supplied by a main contractor. Subcontractors are increasingly responsible for key operations in the production process (purchase of raw materials, design of products, investment, etc).

The nature of the interdependence between subcontractors and main contractors is therefore changing, and is bringing about a new type of relationship which must be taken into account in the policies carried out for enterprises. Information about enterprises must adapt to this change. This is why, at the request of the European Commission's DG XXIII, Eurostat has taken on the task of testing within volunteer Member States a new concept of subcontracting and of evaluating its importance and characteristics.

New industrial subcontracting in Europe presents the results of Eurostat's pilot statistical exercise in which four sectors were the subject of surveys or studies:

★ the automobile sector;

★ electronics;

★ textiles/clothing;

★ aeronautics.

For each sector, a study was made of the importance of subcontracting within the purchases of main contractors, the importance of subcontracting sales within the subcontractors' turnover figures, the geographical extent of subcontracting transactions, and finally the main characteristics of the links established between main contractors and subcontractors (existence of contracts, supply of materials, cooperation in research and development, etc).

The measurements that were carried out within this pilot exercise, using harmonised methodology and concepts, contribute today to a better understanding of the organisation of industrial relationships which underpin four essential sectors of the European economy.

The publication is available in French and English.

Catalogue number in French, CA-01-96-139-FR-C; in English, CA-01-96-139-EN-C.

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2. Latest outlook

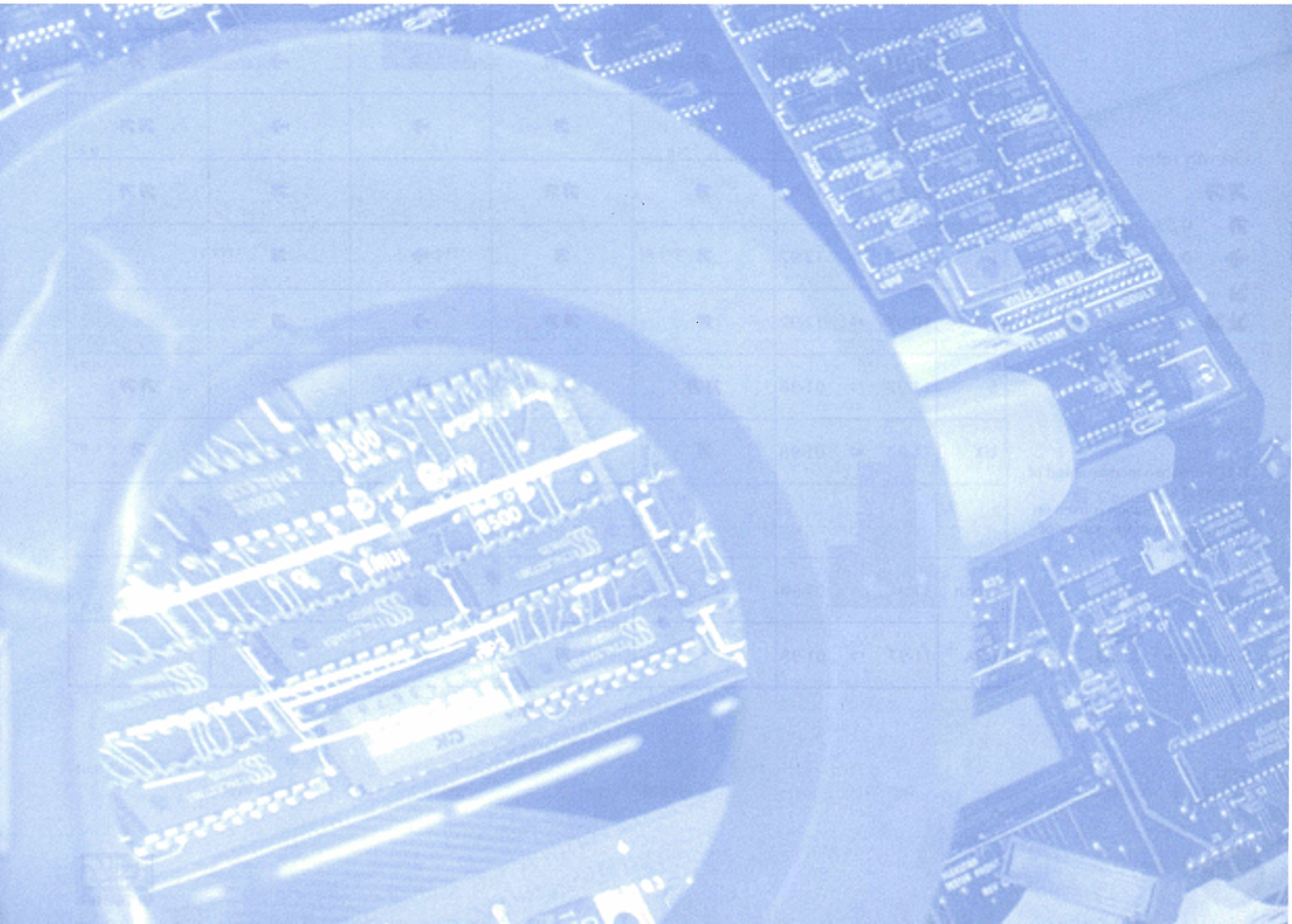


Table 2.1

Business cycle at a glance: growth rate, three months compared to the previous three months (%)

	Latest 3 months available	Estimated output index (1)	Production	Producer prices	Capacity utilisation (2)	New orders
EU–15	11-97 ⇨ 01-98	↗	↗	→	→	↗
B	10-97 ⇨ 12-97	:	↗	→	↗	:
DK	11-97 ⇨ 01-98	:	↗	↘	↗	↗
D	11-97 ⇨ 01-98	→	↗	→	→	→
EL	10-97 ⇨ 12-97	:	→	↗	↘↘	:
E	11-97 ⇨ 01-98	↗	↗	→	↘	:
F	11-97 ⇨ 01-98	↗	↗	→	↘	:
IRL	08-97 ⇨ 10-97	↗↗	↗↗	→	↗	:
I	11-97 ⇨ 01-98	↗	↗	→	↗	↗
L	10-97 ⇨ 12-97	↗	↗↗	→	→	↗
NL	10-97 ⇨ 12-97	↗	↗	→	→	↗↗
A	09-97 ⇨ 11-97	↗	↗↗	:	↗	↗↗
P	10-97 ⇨ 12-97	↗	↗	→	↗	:
FIN	10-97 ⇨ 12-97	↗	↗↗	→	↗	:
S	11-97 ⇨ 01-98	↗↗	↗	→	↗	↗↗
UK	11-97 ⇨ 01-98	↗	→	↗	→	↗
Japan	11-97 ⇨ 01-98	:	↘	→	:	:
USA	11-97 ⇨ 01-98	:	↗	↘	:	:

Growth rates:

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

1) EOI runs two months ahead of the period given
2) capacity utilisation is fixed on the first month of the quarter of the period given

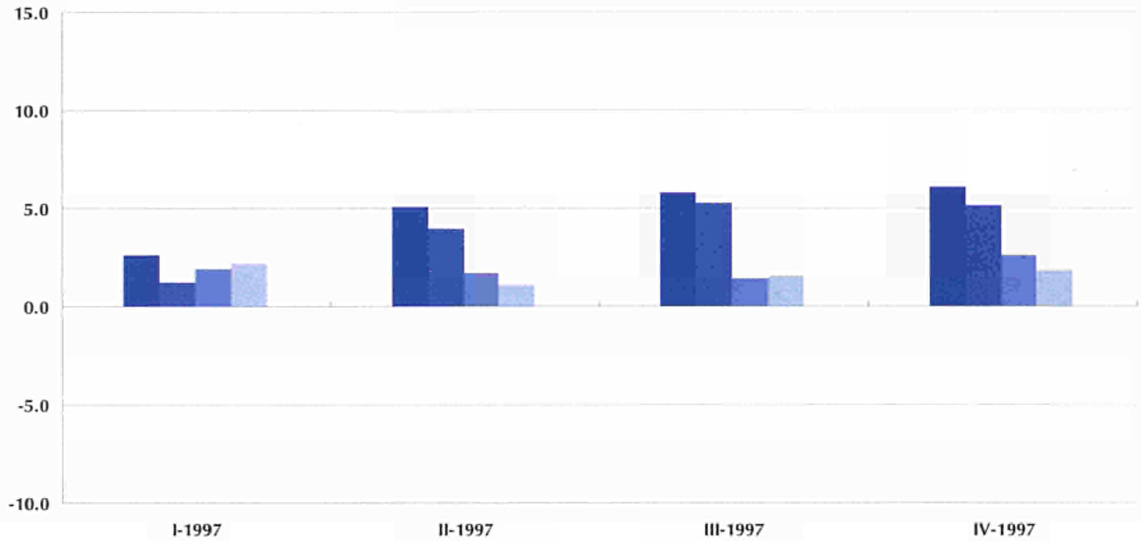
Source: eurostat

Production index (working day adjusted)

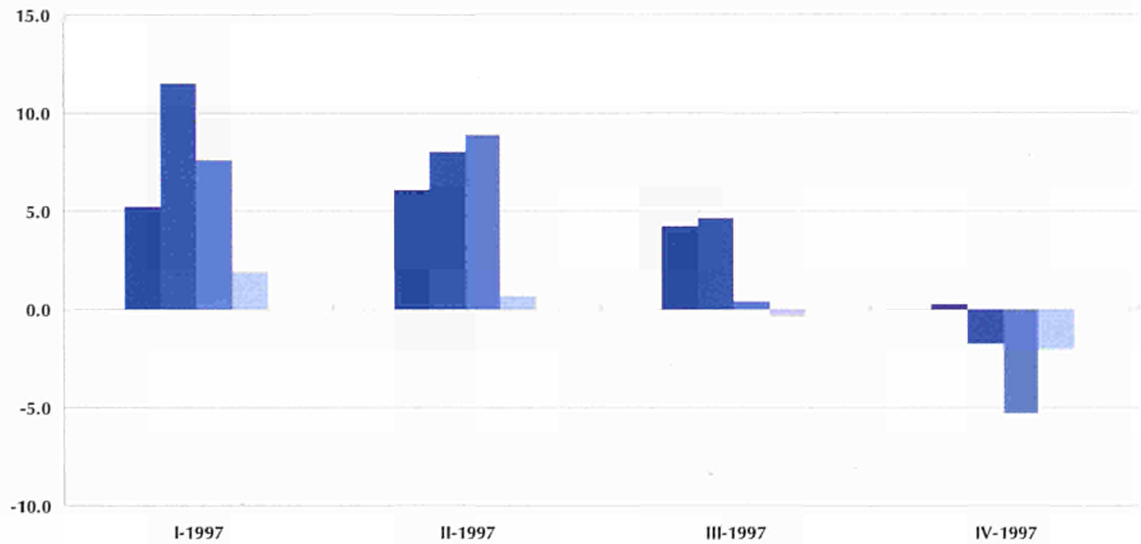
Figure 2.1

Industrial production for the main industrial groupings: growth rate, year on year (%)

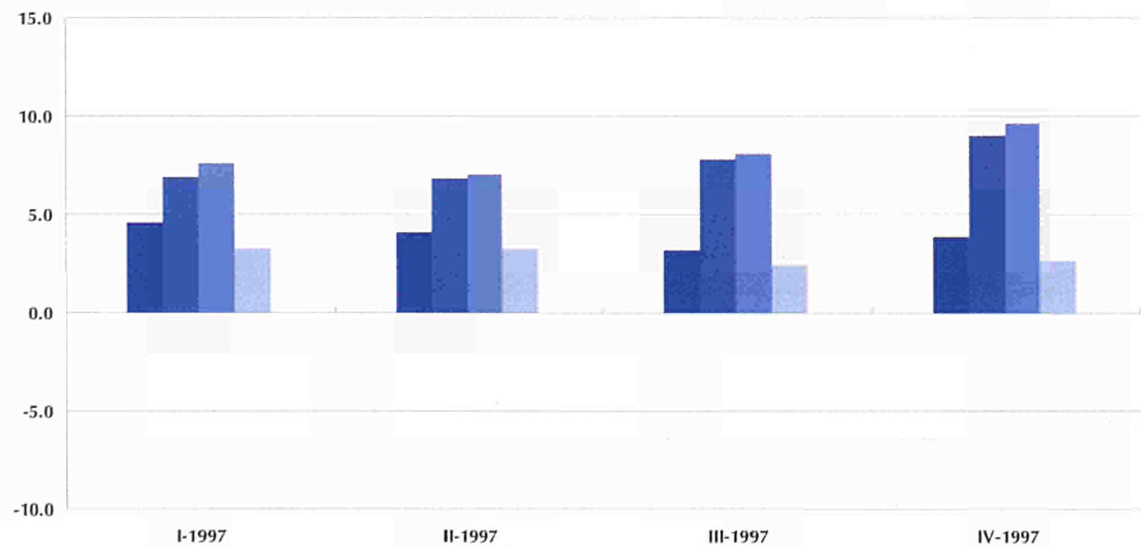
EU-15



Japan



USA



Intermediate goods

Capital goods

Consumer durables

Consumer non-durables

Source: eurostat

Table 2.2

Industrial production: indices (1995 = 100)

	1995	1996	1997	08-97	09-97	10-97	11-97	12-97	01-98
EU–15	100.0	100.1	103.9	104.4	104.8	105.5	105.7	105.7	105.8
B	100.0	100.8	105.1	107.7	104.3	105.0	106.0	110.0	:
DK	100.0	101.1	105.5	105.9	107.7	107.1	108.7	109.0	110.5
D	100.0	100.2	104.1	103.3	105.3	105.9	106.1	105.5	106.3
EL	100.0	101.0	102.9	101.9	103.8	102.1	102.6	103.4	:
E	100.0	99.0	105.9	109.0	107.9	109.3	108.3	108.9	108.3
F	100.0	99.9	103.8	105.3	105.0	107.2	105.6	108.0	107.0
IRL	100.0	108.0	:	129.9	129.5	130.3	:	:	:
I	100.0	97.2	99.8	102.5	100.8	101.0	101.1	102.4	101.8
L	100.0	99.6	106.3	108.2	107.5	111.9	110.9	112.9	:
NL	100.0	102.7	104.6	104.5	104.2	105.4	107.7	104.7	:
A	100.0	101.0	:	107.0	108.1	108.9	109.7	:	:
P	100.0	101.4	103.9	104.6	106.1	106.9	107.3	104.5	:
FIN	100.0	103.7	112.4	112.9	111.9	114.3	117.1	118.3	:
S	100.0	103.1	111.2	111.0	115.1	113.3	117.2	117.6	112.0
UK	100.0	100.9	102.1	103.3	103.0	102.8	102.3	102.4	101.8
Japan	100.0	102.4	106.8	105.4	108.1	108.0	102.8	104.1	107.1
USA	100.0	103.5	108.6	109.3	109.6	110.5	111.2	111.7	111.7

Source: eurostat

Table 2.3

Industrial production for the main industrial groupings: indices (1995 = 100)

	1995	1996	1997	08-97	09-97	10-97	11-97	12-97	01-98
Total industry									
EU–15	100.0	100.1	103.9	104.4	104.8	105.5	105.7	105.7	105.8
Japan	100.0	102.4	106.8	105.4	108.1	108.0	102.8	104.1	107.1
USA	100.0	103.5	108.6	109.3	109.6	110.5	111.2	111.7	111.7
Intermediate goods									
EU–15	100.0	99.1	103.9	104.6	104.9	105.8	106.1	106.5	106.7
Japan	100.0	100.3	104.3	103.6	105.6	105.3	101.2	101.7	102.9
USA	100.0	102.4	106.3	106.6	106.5	107.4	108.3	108.9	108.3
Capital goods									
EU–15	100.0	102.0	105.9	105.9	106.6	107.9	108.5	106.9	108.9
Japan	100.0	109.0	115.0	115.2	115.1	115.3	110.5	109.9	114.8
USA	100.0	105.2	113.2	115.0	114.8	115.4	116.7	116.7	117.5
Consumer durables									
EU–15	100.0	100.2	102.1	100.3	102.0	102.7	103.5	101.4	102.7
Japan	100.0	97.9	100.7	94.0	99.6	101.6	91.0	96.1	100.4
USA	100.0	106.2	114.8	116.4	116.5	117.4	119.1	119.6	120.0
Consumer non-durables									
EU–15	100.0	99.0	100.7	100.5	101.0	101.3	100.6	101.3	100.9
Japan	100.0	99.6	99.6	94.3	100.5	102.5	95.6	98.5	100.2
USA	100.0	100.6	103.5	103.4	103.6	104.4	104.9	105.3	105.5

Source: eurostat

Production index (trend cycle)

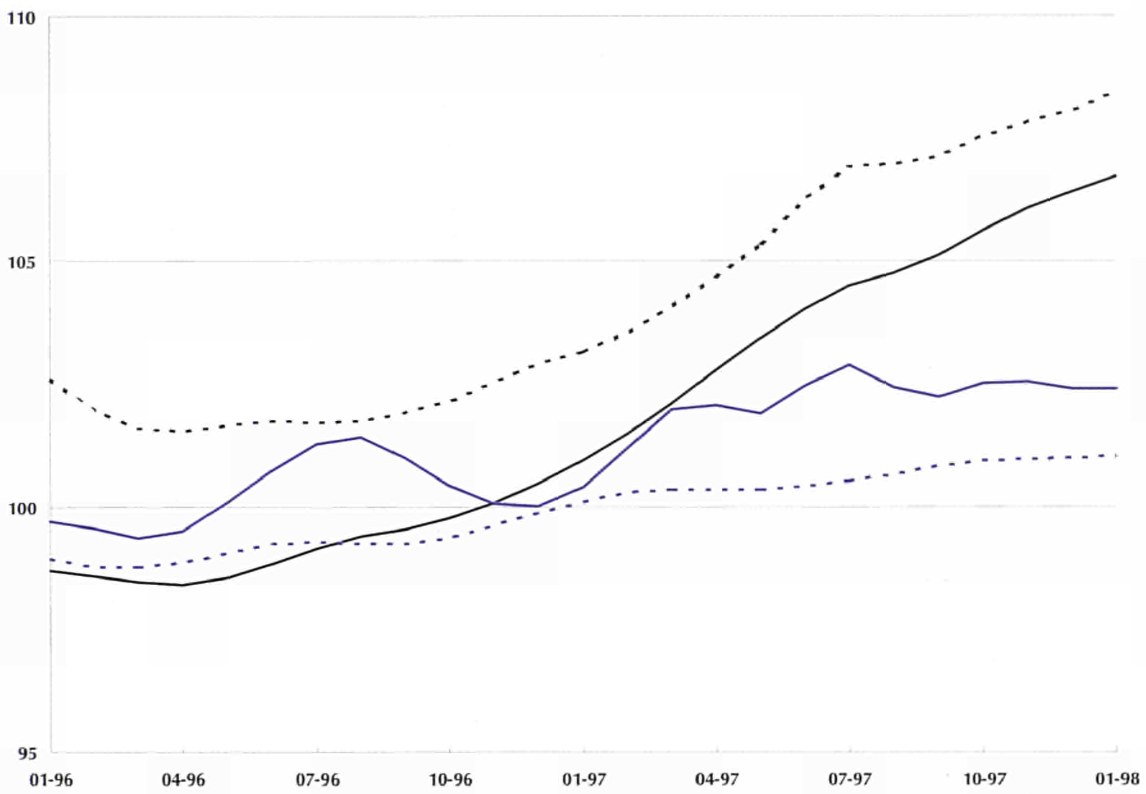


Figure 2.2

EU-15 industrial production for the main industrial groupings: indices (1995 = 100)

Source: eurostat

Table 2.4

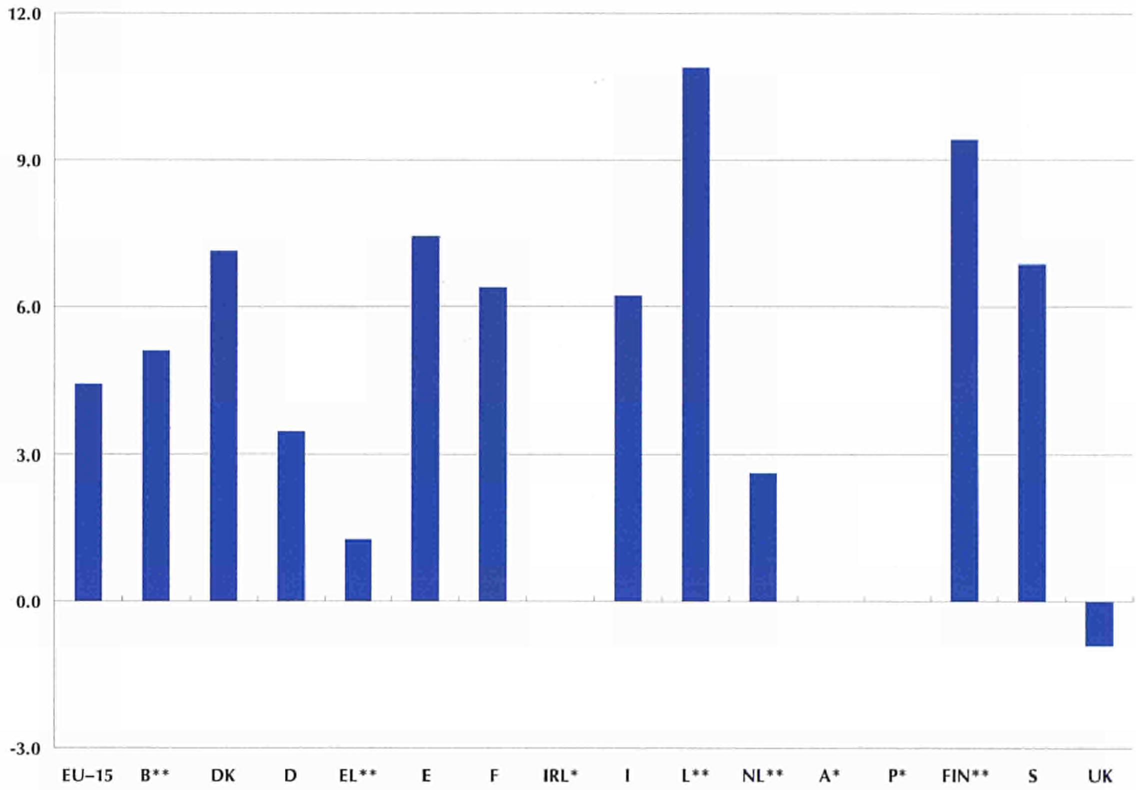
Industrial production for the main industrial groupings: growth rate, three months compared to the previous three months (%)

	Latest 3 months available			Total industry	Intermediate goods	Capital goods	Consumer durables	Consumer non-durables
EU–15	11-97	⇨	01-98	0.8	1.2	0.8	0.0	0.2
B	10-97	⇨	12-97	0.8	1.3	-0.4	0.4	0.8
DK	11-97	⇨	01-98	1.8	1.2	0.8	1.5	2.1
D	11-97	⇨	01-98	0.9	1.5	1.0	0.3	0.1
EL	10-97	⇨	12-97	0.2	-0.3	0.6	1.2	0.7
E	11-97	⇨	01-98	0.8	0.0	2.3	2.7	0.7
F	11-97	⇨	01-98	1.3	1.7	2.0	1.5	0.3
IRL	08-97	⇨	10-97	4.4	6.1	5.2	:	1.3
I	11-97	⇨	01-98	0.7	0.9	0.7	-1.3	0.0
L	10-97	⇨	12-97	3.1	4.2	1.0	1.8	1.8
NL	10-97	⇨	12-97	0.8	0.4	1.5	1.5	0.3
A	09-97	⇨	11-97	2.5	:	5.0	-2.4	0.5
P	10-97	⇨	12-97	1.1	0.9	2.2	3.8	-0.9
FIN	10-97	⇨	12-97	3.1	3.1	3.0	5.4	1.7
S	11-97	⇨	01-98	1.6	1.7	-0.1	3.1	0.1
UK	11-97	⇨	01-98	-0.3	0.2	0.1	-0.9	0.5
Japan	11-97	⇨	01-98	-1.7	-2.3	-1.9	-2.2	-0.8
USA	11-97	⇨	01-98	1.4	1.3	1.9	2.4	1.2

Source: eurostat

Figure 2.3

Industrial production for total industry: growth rate, three months compared to the same three months of the previous year, 11-97 to 01-98 (%)



Source: eurostat

Table 2.5

Industrial production for the main industrial groupings: growth rate, three months compared to the same three months of the previous year (%)

	Latest 3 months available			Total industry	Intermediate goods	Capital goods	Consumer durables	Consumer non-durables
EU–15	11-97	⇨	01-98	4.4	5.8	5.0	2.8	1.1
B	10-97	⇨	12-97	3.5	6.0	-2.1	-0.5	2.8
DK	11-97	⇨	01-98	7.2	5.6	4.5	10.0	9.6
D	11-97	⇨	01-98	3.5	6.7	4.3	0.2	-1.5
EL	10-97	⇨	12-97	1.7	1.1	1.4	-2.6	3.3
E	11-97	⇨	01-98	7.4	6.4	10.2	12.6	4.9
F	11-97	⇨	01-98	6.4	6.7	10.0	9.2	2.0
IRL	08-97	⇨	10-97	20.8	35.8	23.4	:	4.9
I	11-97	⇨	01-98	6.2	8.9	1.6	-1.0	2.1
L	10-97	⇨	12-97	11.4	16.1	2.4	3.3	6.5
NL	10-97	⇨	12-97	3.0	2.5	4.7	7.4	2.2
A	09-97	⇨	11-97	6.7	:	11.3	-2.1	2.9
P	10-97	⇨	12-97	5.4	8.1	6.1	7.3	-4.7
FIN	10-97	⇨	12-97	9.1	11.2	14.4	18.1	4.6
S	11-97	⇨	01-98	6.9	7.4	8.9	11.9	-0.2
UK	11-97	⇨	01-98	-0.9	-0.6	-0.3	0.8	-1.5
Japan	11-97	⇨	01-98	-1.7	-1.5	-3.0	-6.7	-3.8
USA	11-97	⇨	01-98	5.7	3.7	8.8	9.6	2.7

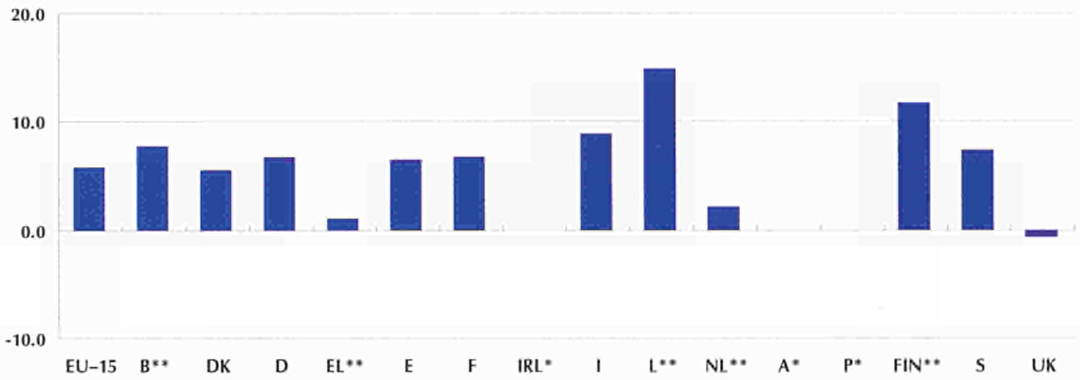
Source: eurostat

Production index (working day adjusted)

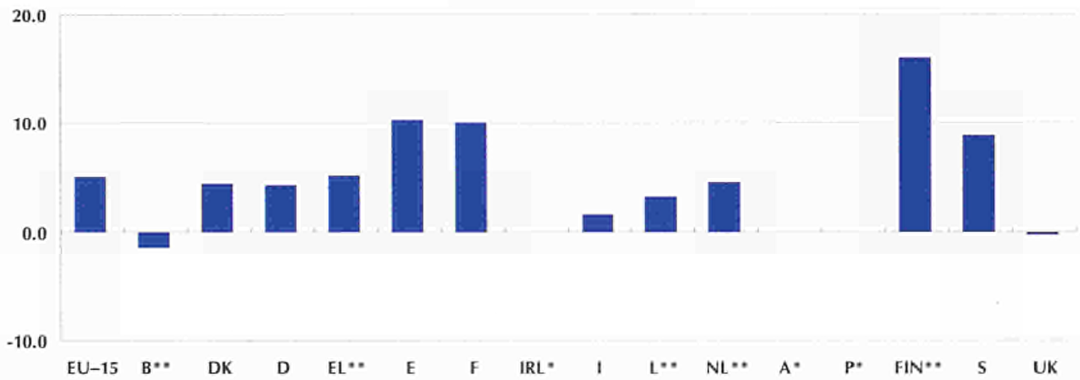
Figure 2.4

Industrial production for EU-15 for the main industrial groupings: growth rate, three months compared to the same three months of the previous year, 11-97 to 01-98 (%)

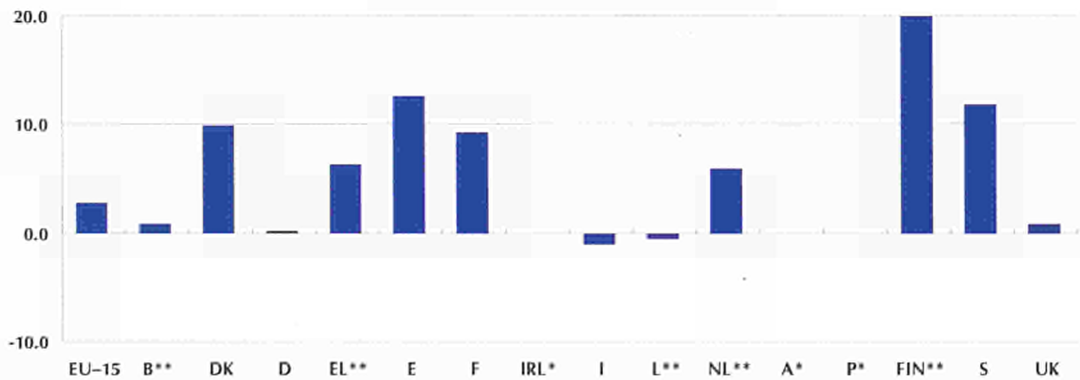
Intermediate goods



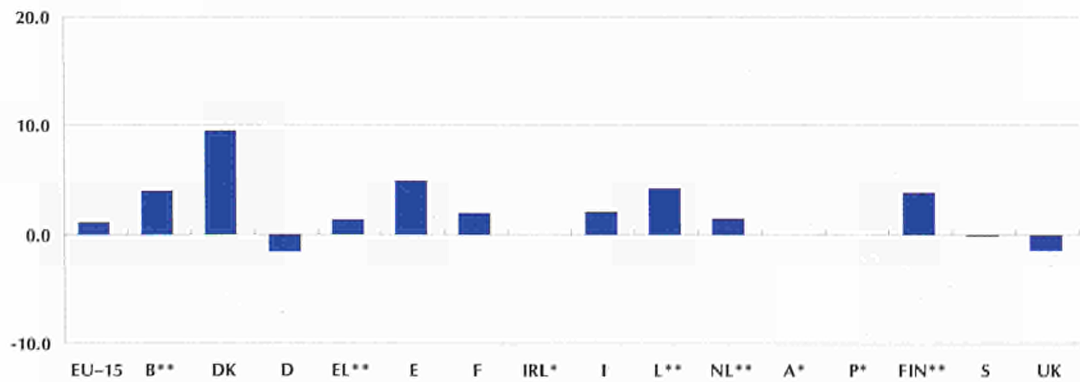
Capital goods



Consumer durables goods



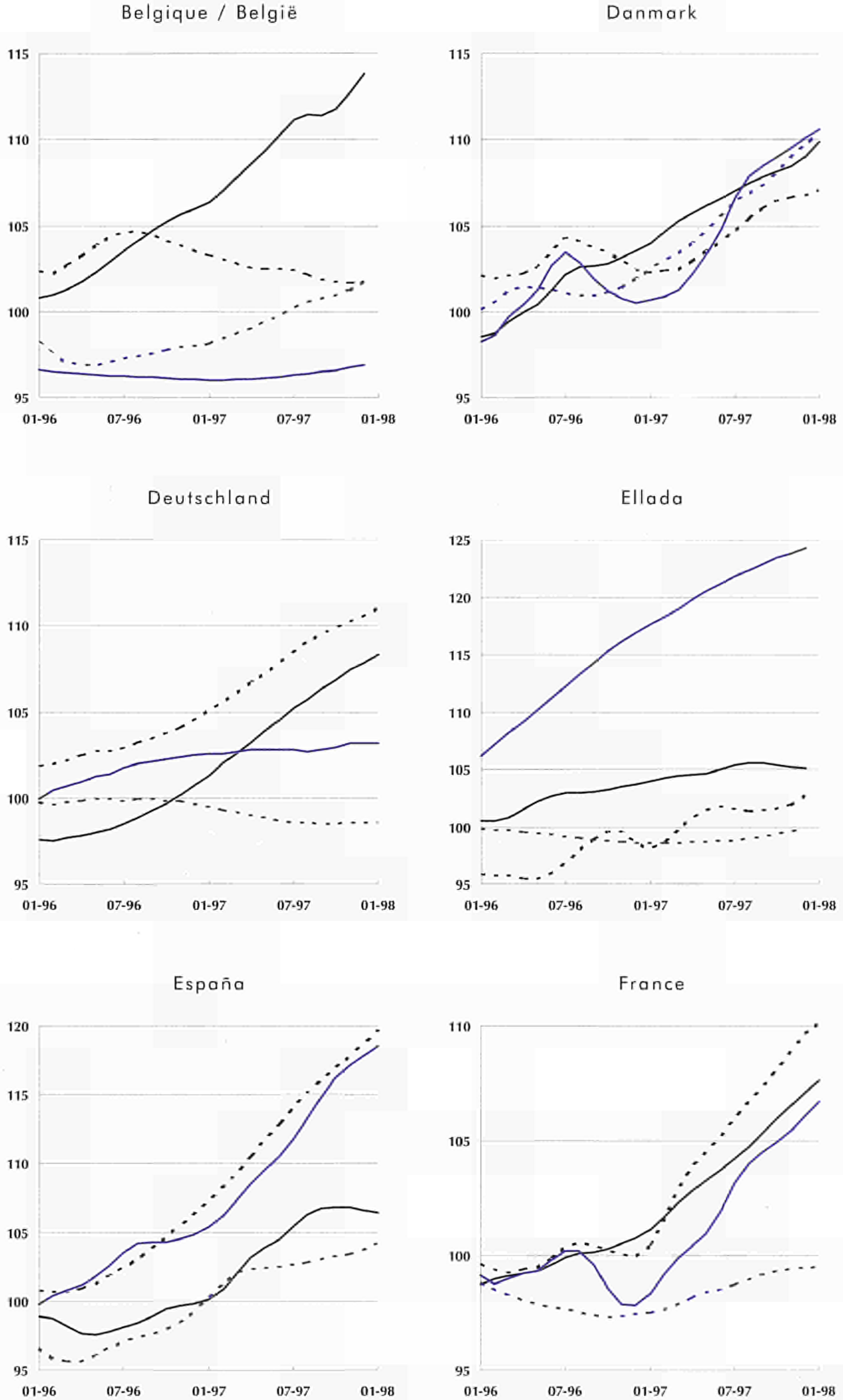
Consumer non-durables goods



Source: eurostat

Figure 2.5

Industrial production for the main industrial groupings: indices (1995 = 100)



Intermediate goods

Capital goods

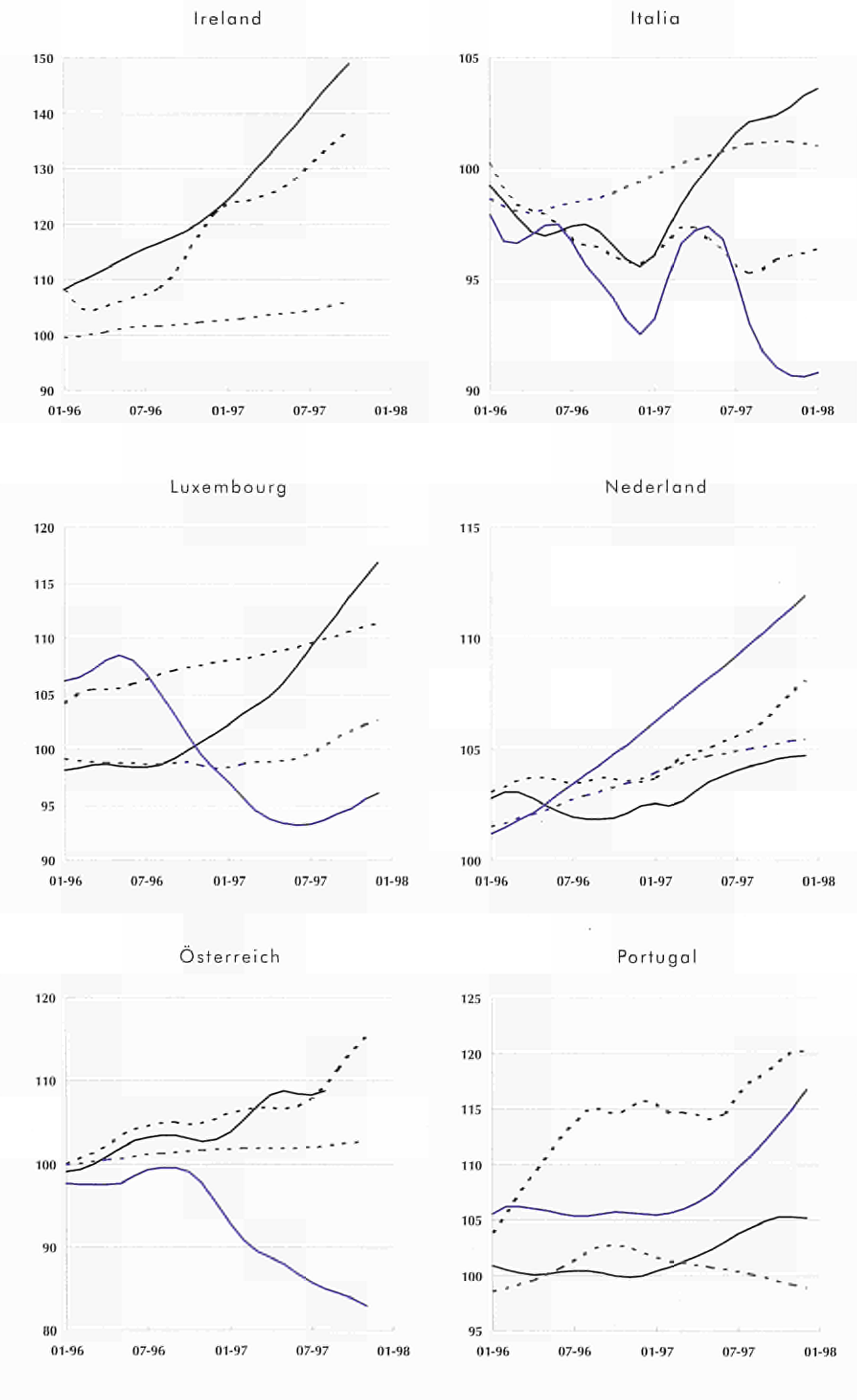
Consumer durables

Consumer non-durables

Source: eurostat

Figure 2.5

Industrial production for the main industrial groupings: indices (1995 = 100)



Intermediate goods

Capital goods

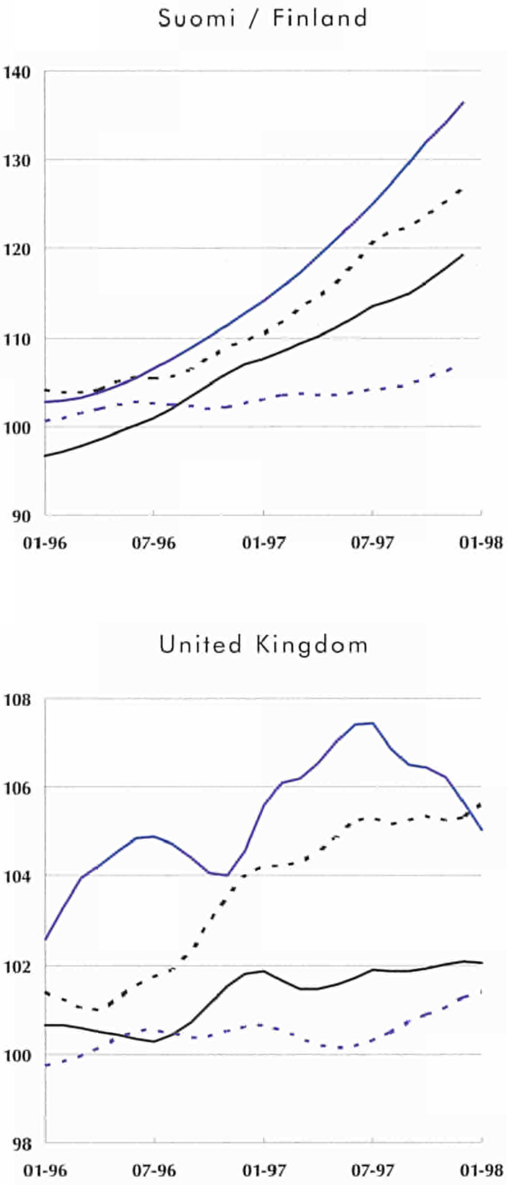
Consumer durables

Consumer non-durables

Source: eurostat

Figure 2.5

Industrial production for the main industrial groupings: indices (1995 = 100)



Intermediate goods ———

Capital goods - - - - -

Consumer durables ———

Consumer non-durables - - - - -

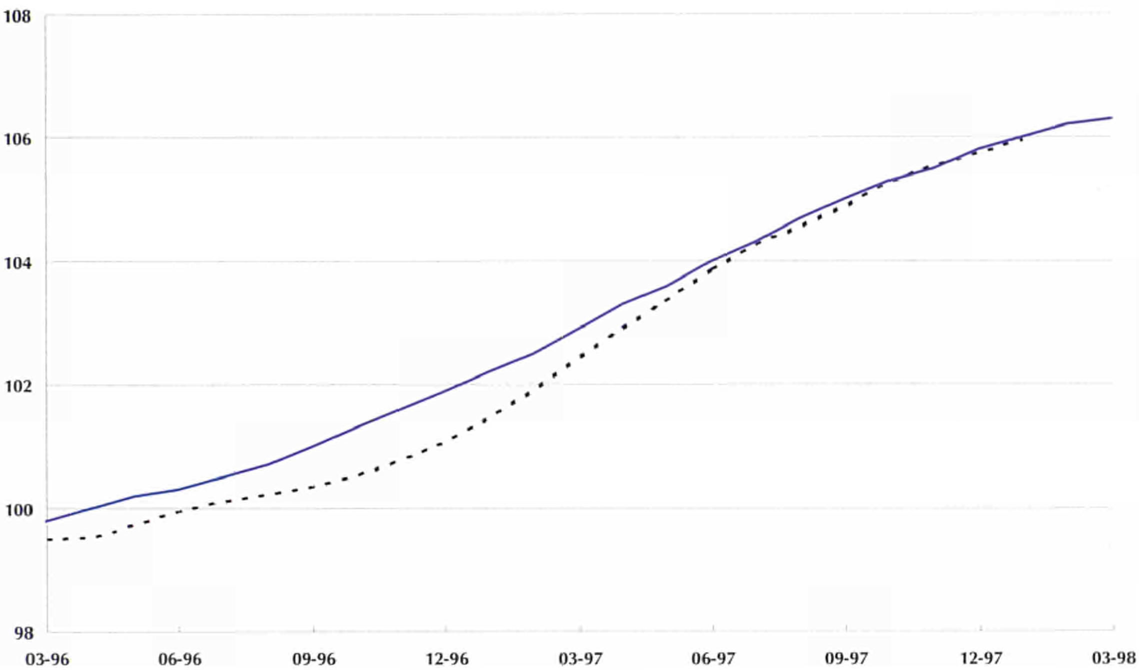
Source: eurostat

Further information - the production index:

The index of production aims to measure 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. Since the monthly evolution of value added can not be measured, as an approximation, product output or deflated turnover is used.
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 and Spain). Secondly, for EU-15 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.
Full methodological notes may be found on page 73.

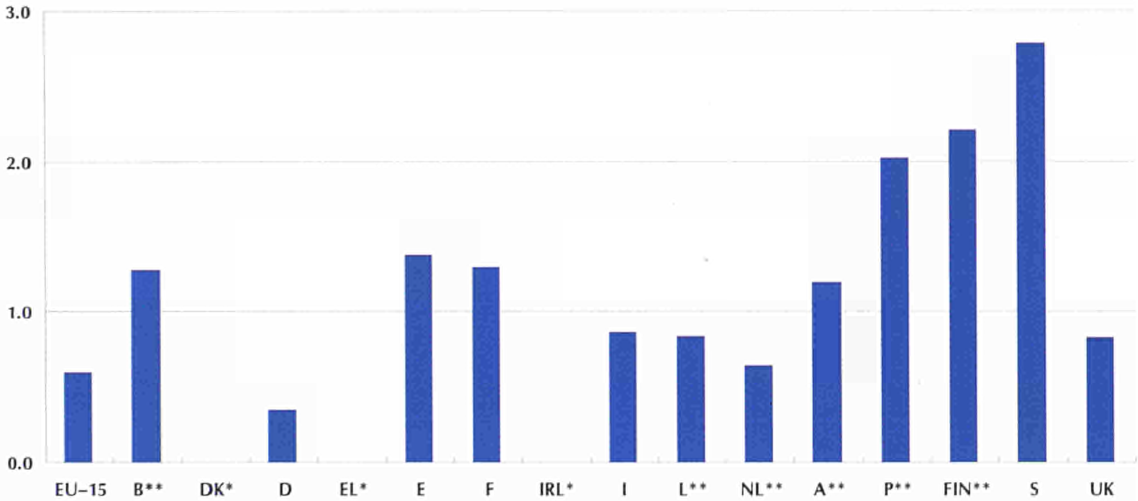
Production index (expected output index)

Figure 2.6



EU-15 expected output index for total industry: indices (1995 = 100)

Expected output index for total industry, three months compared to the previous three months, 01-98 to 03-98 (%)



Source: eurostat

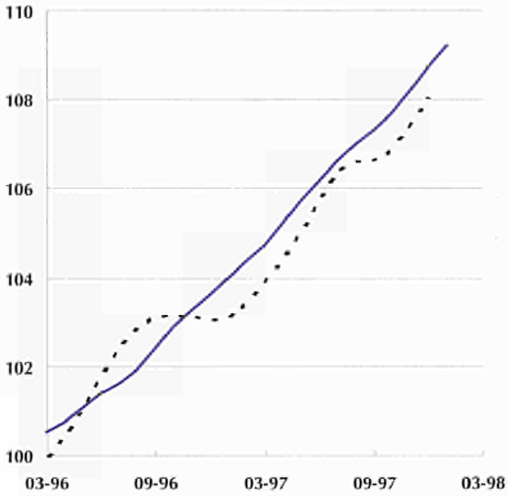
Further information - expected output index:

The Expected Output Index (EOI) links several aspects of information from qualitative business opinion surveys (questions on order books and questions on production expectations) with the index of industrial production. As the data from the business opinion surveys are available earlier and lead the evolution of industrial production, they can be used to compute a short-term estimate of the production index.
A multiple regression is run, using the growth rate of the industrial production lagged with values of the business opinion survey data. The result of this regression is "integrated" from a growth rate to an evolution, and after that the trend cycle is calculated for a clearer interpretation of the results.
Details of the estimation method can be found in a more thorough article that was published in Special Edition 5/97 of the Monthly Panorama of the European Industry.
Full methodological notes may be found on page 73.

Figure 2.7

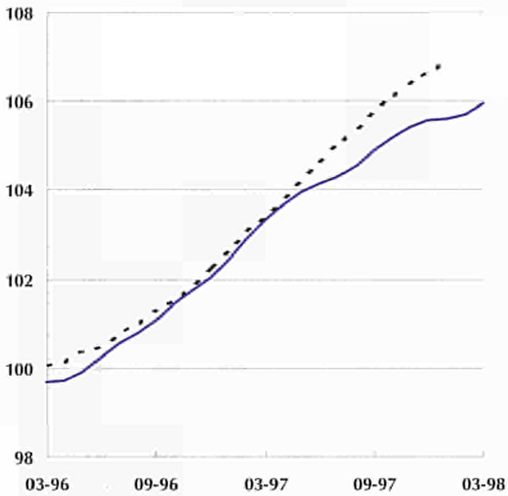
Expected output index for total industry: indices (1995 = 100)

Belgique / België



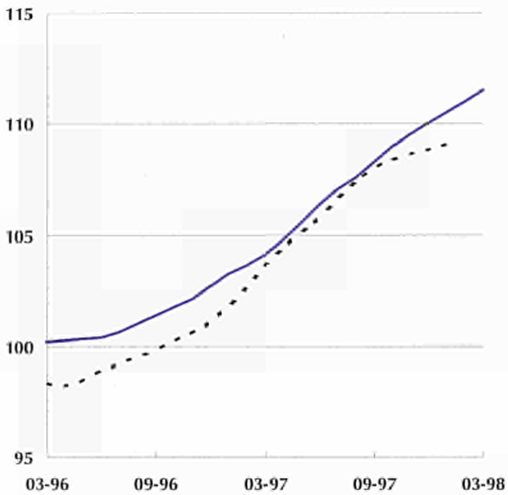
Danmark

Deutschland

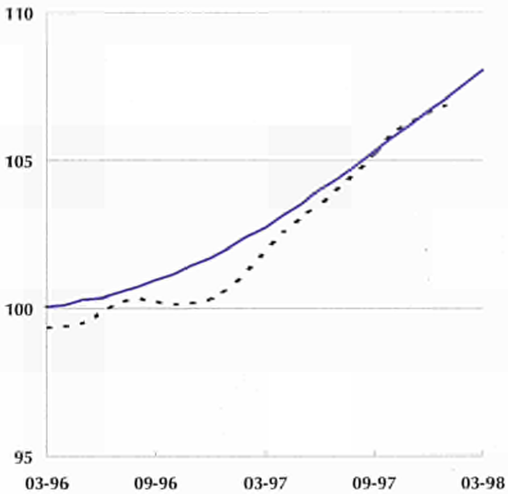


Ellada

España



France



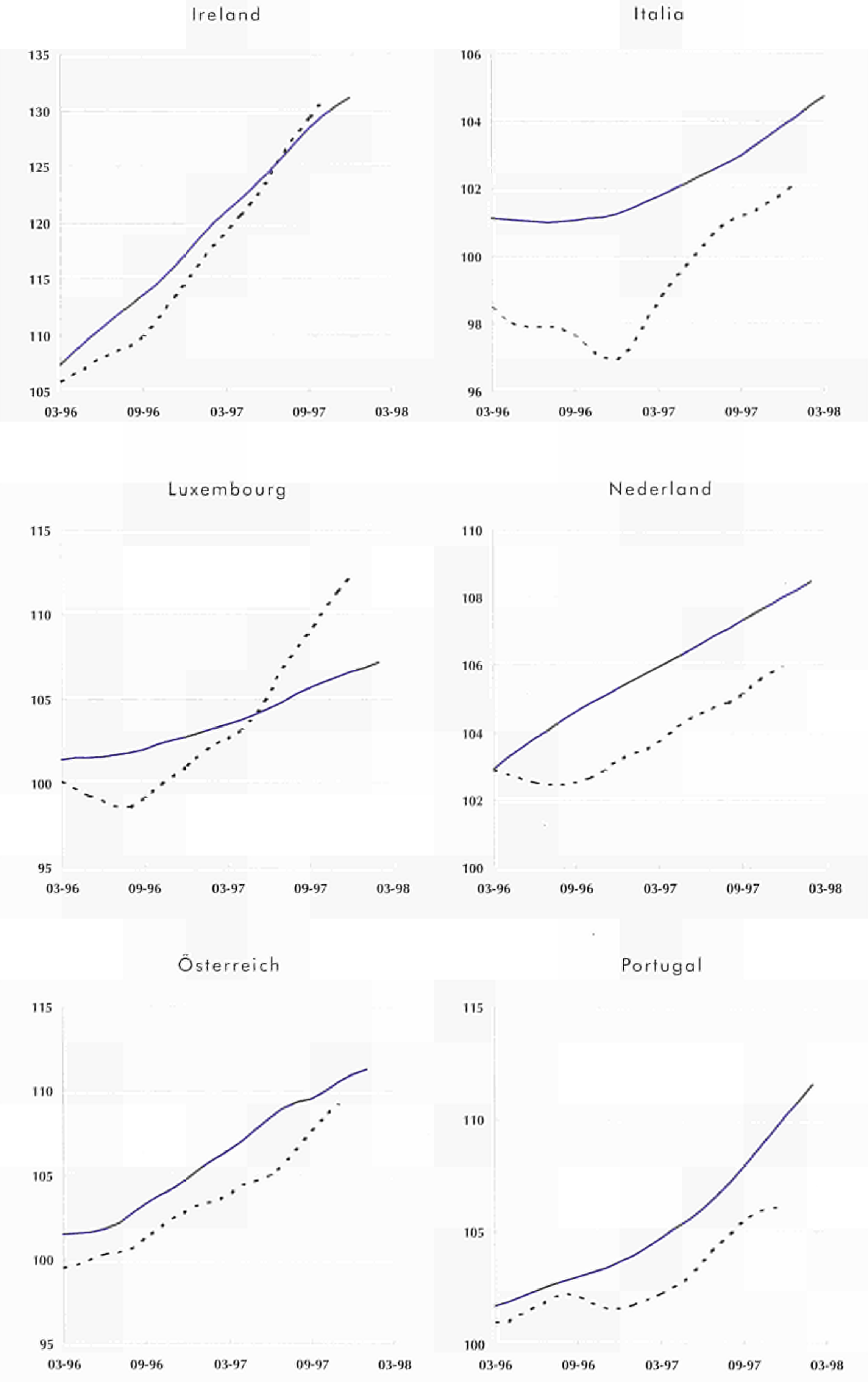
Production index - - - - -

Expected output index ———

Source: eurostat

Figure 2.7

Expected output index for total industry: indices (1995 = 100)



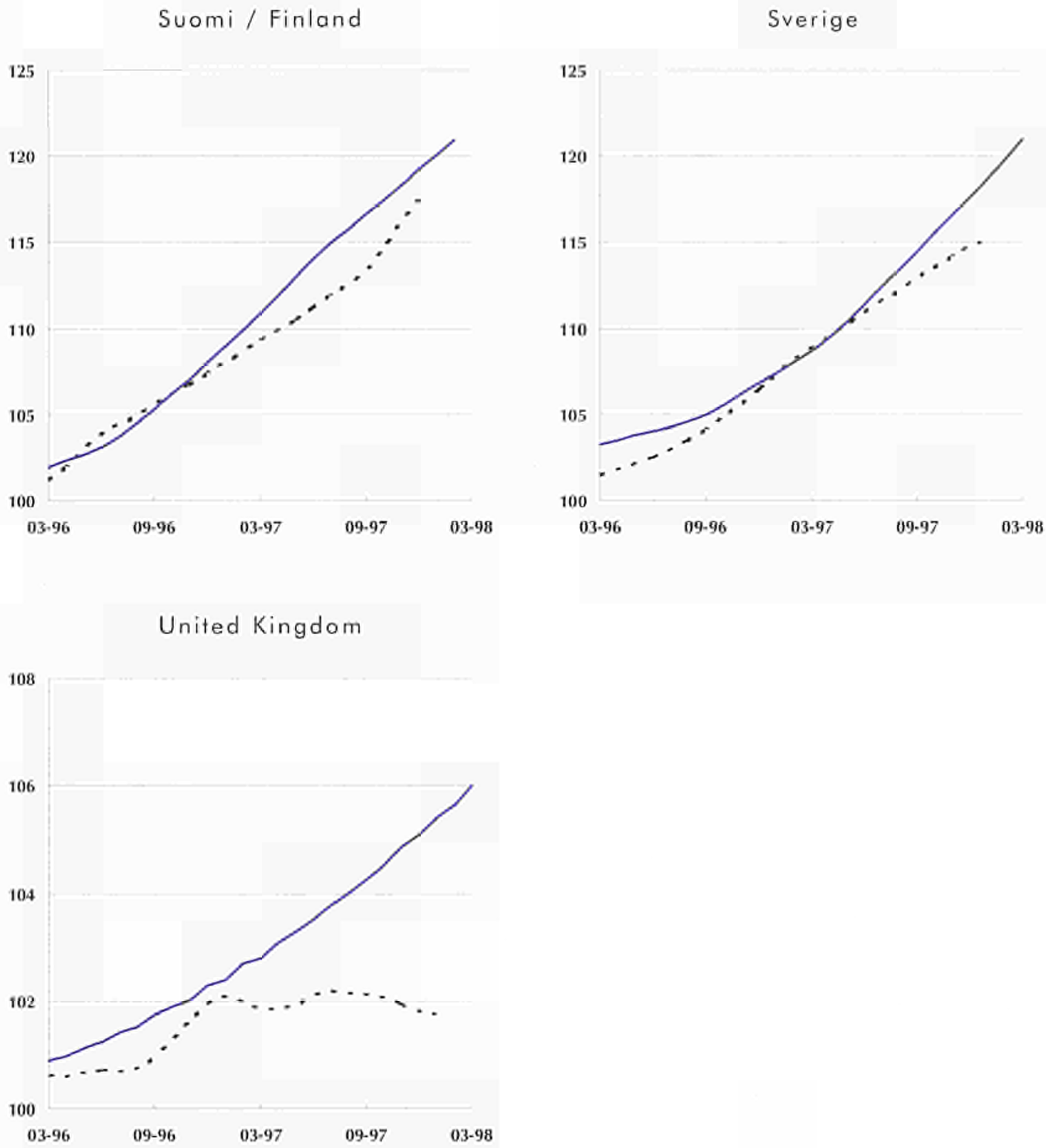
- - - - - Production index

——— Expected output index

Source: eurostat

Figure 2.7

Expected output index for total industry: indices (1995 = 100)



Production index -----

Expected output index ——

Source: eurostat

Domestic producer price index

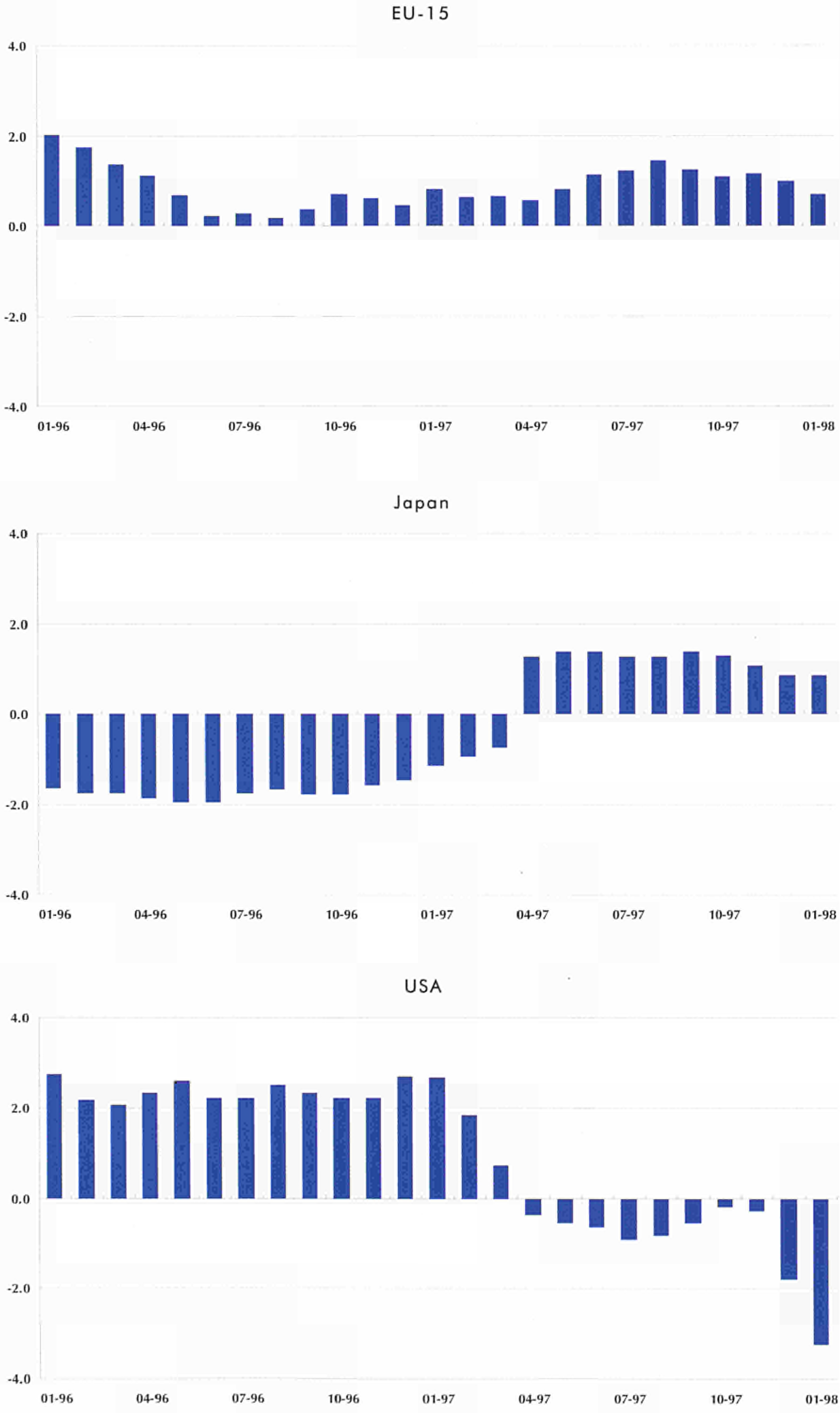


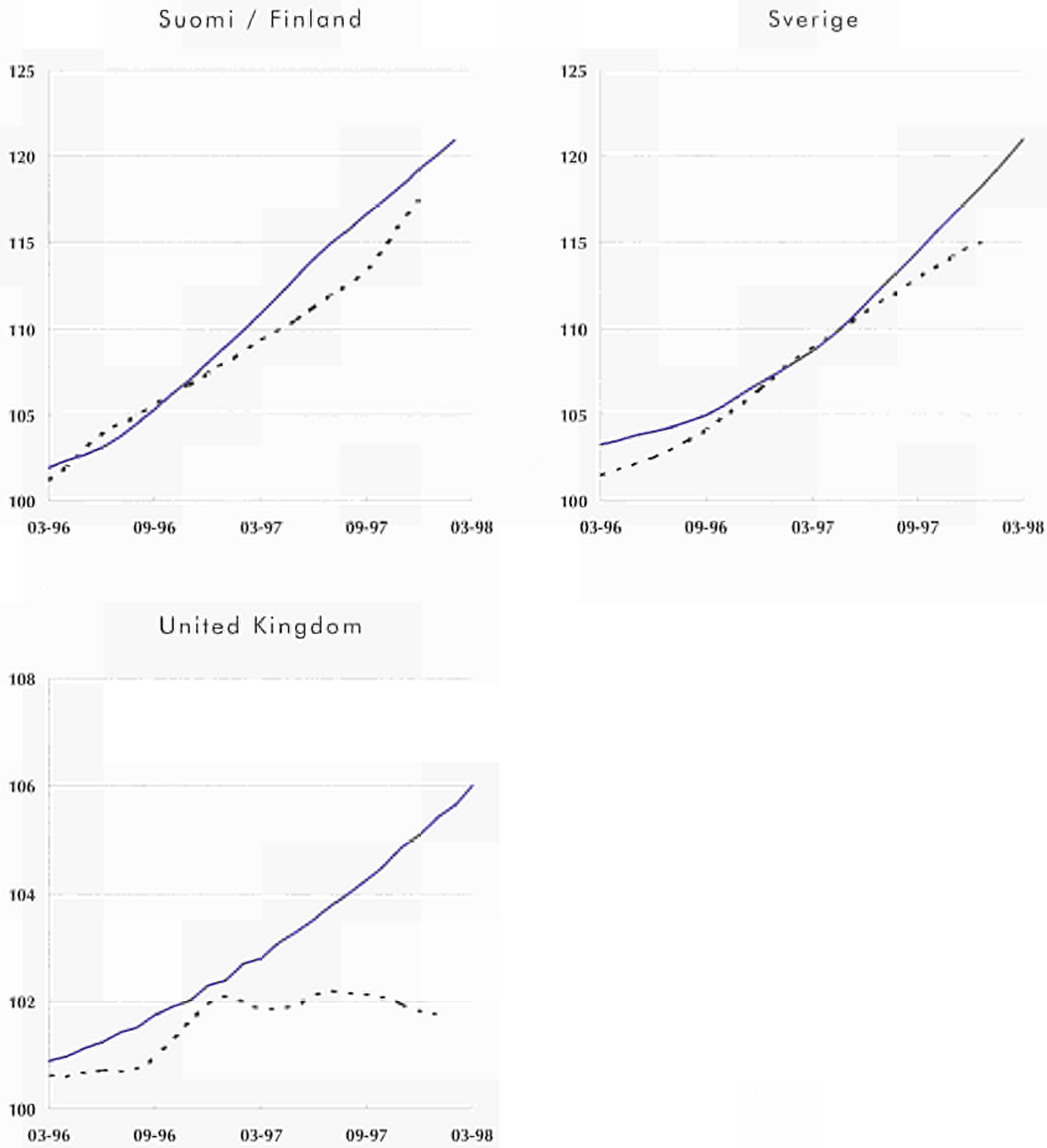
Figure 2.8

Domestic producer price index: growth rate, year on year (%)

Source: eurostat

Figure 2.7

Expected output index for total industry: indices (1995 = 100)



Production index -----

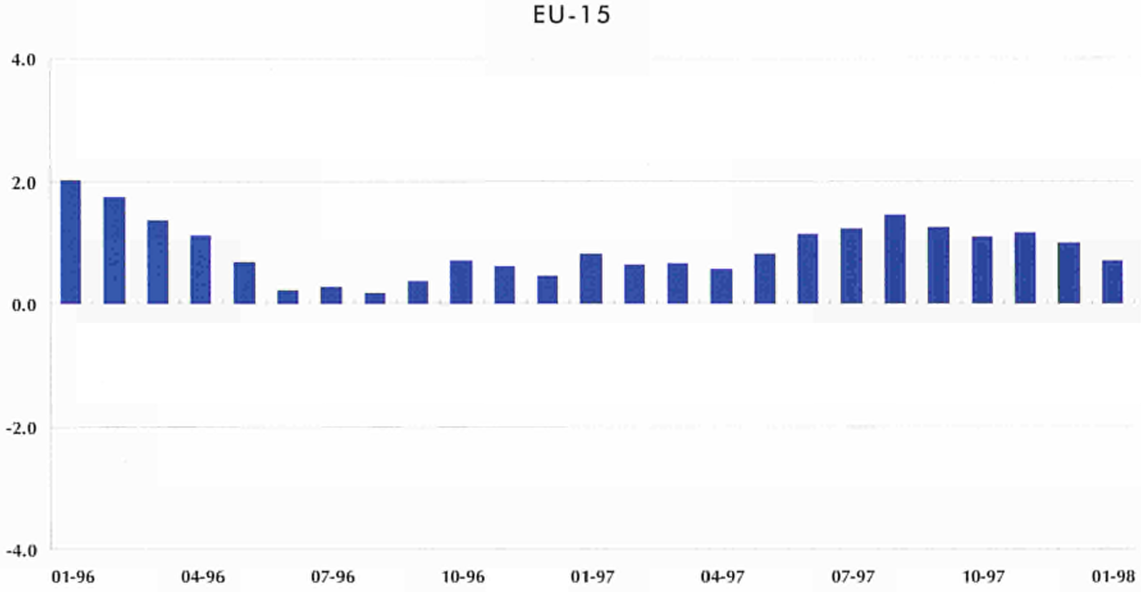
Expected output index ——

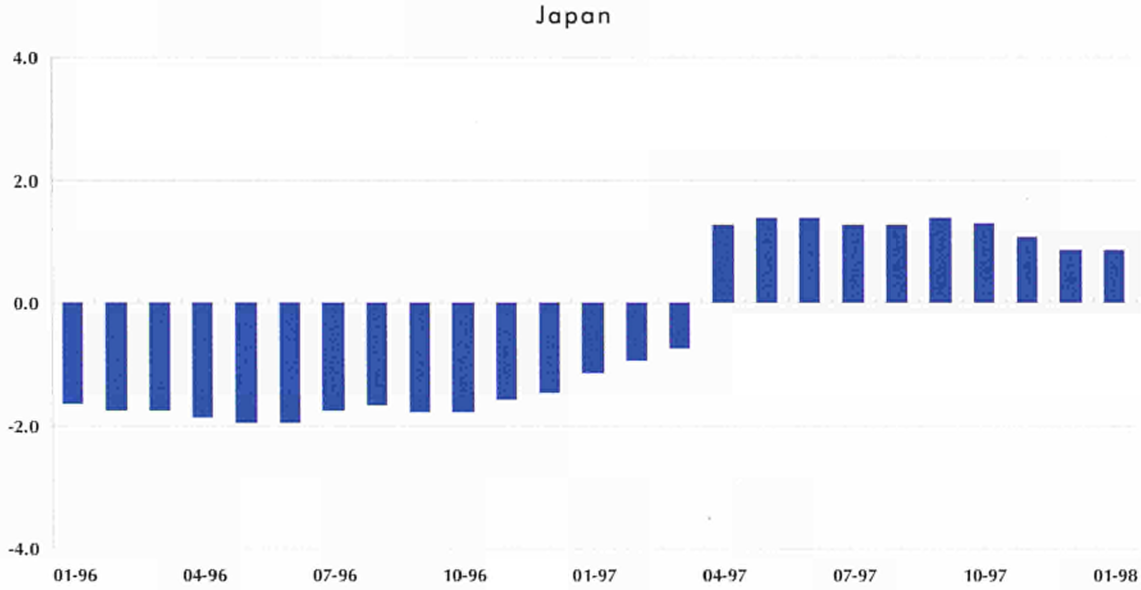
Source: eurostat

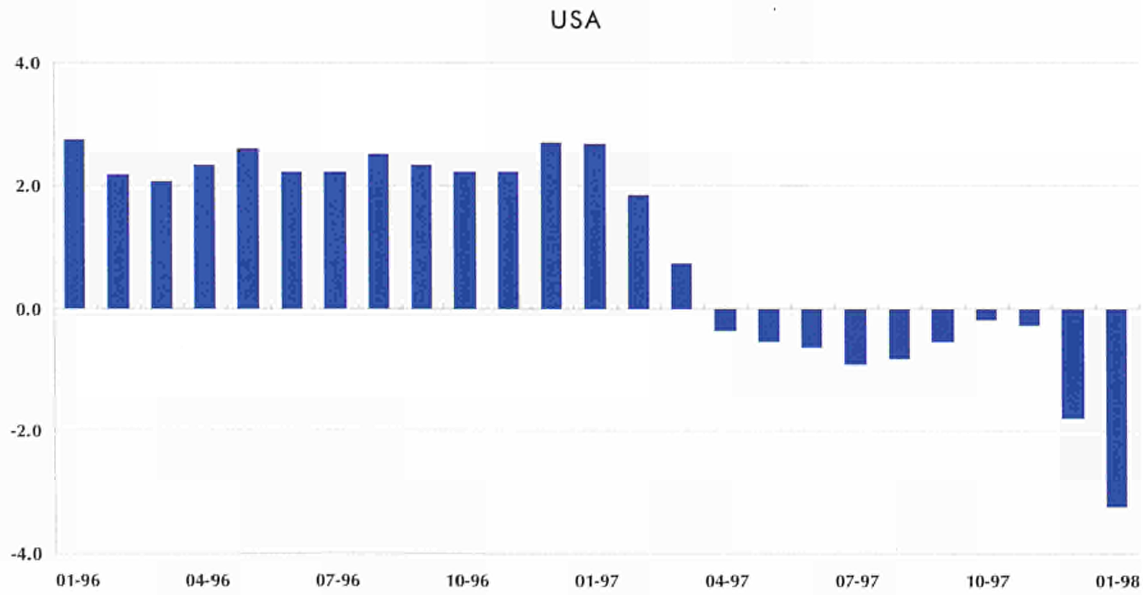
Domestic producer price index

Figure 2.8

Domestic producer price index: growth rate, year on year (%)



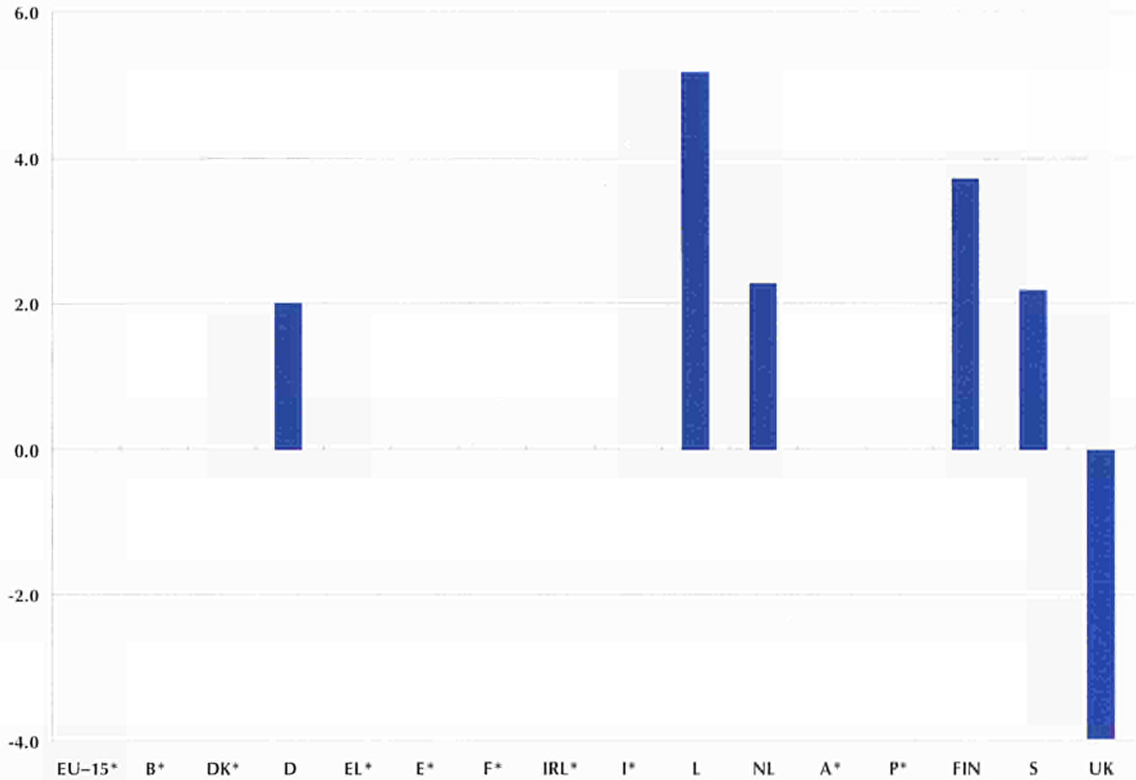




Source: eurostat

Figure 2.9

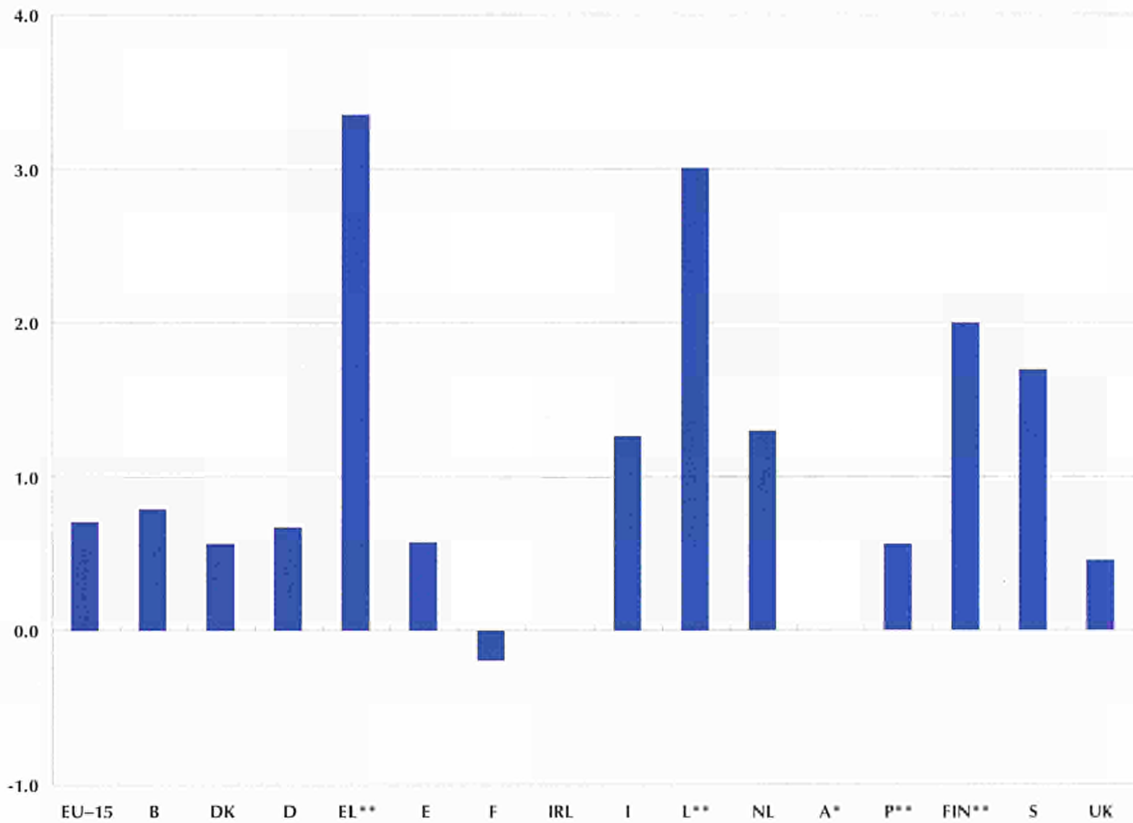
Export prices for manufacturing industry: growth rate, year on year, 12-97 (%)



Source: eurostat

Figure 2.10

Domestic producer price index: growth rate, year on year, 01-98 (%)



Source: eurostat

Domestic producer price index

Table 2.6

Domestic producer price index: indices (1995 = 100)

	1995	1996	1997	09-97	10-97	11-97	12-97	01-98	02-98
EU-15	100.0	100.8	101.8	102.0	102.1	102.3	102.4	102.4	:
B	100.0	100.6	102.3	103.5	103.3	103.1	102.5	101.8	:
DK	100.0	101.6	103.7	104.6	104.4	104.1	103.2	102.2	:
D	100.0	99.6	100.7	101.1	101.0	101.0	100.9	100.8	:
EL	100.0	107.4	111.0	111.9	112.6	112.6	112.1	:	:
E	100.0	101.7	102.7	103.2	103.3	103.4	103.1	102.8	:
F	100.0	100.5	100.7	100.8	100.9	101.0	100.8	100.6	:
IRL	100.0	101.8	101.9	101.7	101.8	101.8	102.1	101.9	:
I	100.0	101.9	103.2	103.5	103.7	103.9	103.8	103.9	:
L	100.0	99.6	101.4	102.6	102.6	102.3	102.3	:	:
NL	100.0	101.8	104.5	105.1	105.1	105.1	104.7	105.0	104.9
A	:	:	:	:	:	:	:	:	:
P	100.0	103.1	104.7	105.7	105.3	105.0	104.7	:	:
FIN	100.0	99.9	101.3	102.1	102.1	102.1	101.9	:	:
S	100.0	100.6	101.7	102.4	102.4	102.1	102.1	102.1	101.9
UK	100.0	100.8	101.2	100.8	101.1	102.0	103.1	103.1	102.9
Japan	100.0	98.2	98.9	99.2	99.0	98.8	98.7	98.7	:
USA	100.0	102.4	102.3	102.2	102.5	102.5	101.6	100.6	:

Source: eurostat

Table 2.7

Domestic producer price index in ECU terms: indices (1995 = 100)

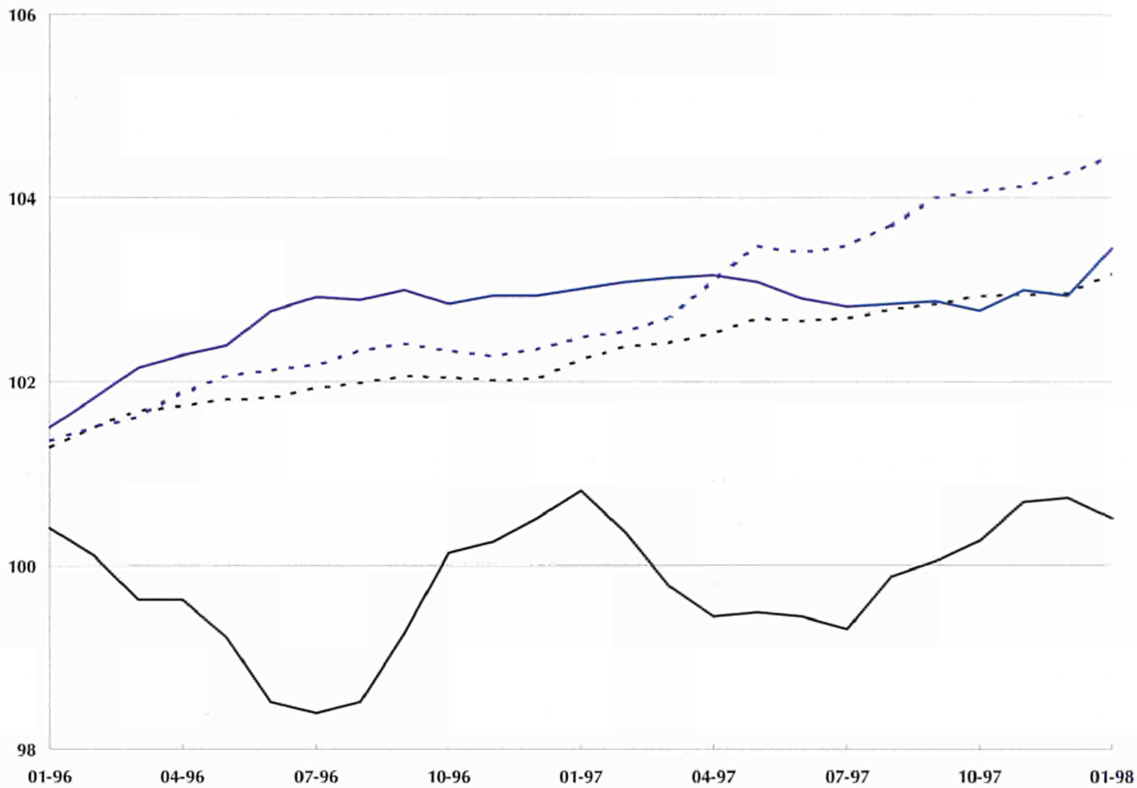
	1995	1996	1997	09-97	10-97	11-97	12-97	01-98	02-98
EU-15	100.0	102.2	104.9	105.3	105.3	105.6	105.7	105.6	:
B	100.0	98.7	97.3	98.2	98.1	97.6	96.9	96.3	:
DK	100.0	101.1	101.5	102.3	102.1	101.6	100.4	99.5	:
D	100.0	97.7	96.0	96.2	96.2	95.9	95.7	95.6	:
EL	100.0	106.6	108.8	109.3	110.1	110.2	109.2	:	:
E	100.0	103.1	100.9	101.3	101.4	101.1	100.6	100.0	:
F	100.0	100.9	99.4	99.4	99.7	99.7	99.4	99.2	:
IRL	100.0	104.7	111.2	111.6	108.9	109.6	109.1	105.7	:
I	100.0	110.8	113.9	114.7	114.5	114.4	114.1	113.7	:
L	100.0	97.7	96.5	97.3	97.4	96.9	96.7	:	:
NL	100.0	99.9	99.2	99.6	99.5	99.1	98.6	98.9	98.8
A	:	:	:	:	:	:	:	:	:
P	100.0	103.3	103.4	103.7	103.0	102.2	101.7	:	:
FIN	100.0	97.9	98.3	99.0	98.9	98.0	97.4	:	:
S	100.0	110.1	109.5	112.6	112.5	110.3	109.9	109.1	107.9
UK	100.0	102.8	121.2	121.5	122.0	125.2	127.7	128.5	128.4
Japan	100.0	87.1	88.5	91.4	89.4	84.8	83.9	85.8	:
USA	100.0	105.5	118.0	121.5	119.6	117.6	119.5	120.9	:

Source: eurostat

Figure 2.11

EU-15 domestic producer price index for the main industrial groupings: indices (1995 = 100)

Intermediate goods
Capital goods
Consumer durables
Consumer non-durables



Source: eurostat

Table 2.8

Domestic producer price index for the main industrial groupings: indices (1995 = 100)

	1995	1996	1997	08-97	09-97	10-97	11-97	12-97	01-98
Total industry									
EU–15	100.0	100.8	101.8	101.9	102.0	102.1	102.3	102.4	102.4
Japan	100.0	98.2	98.9	99.3	99.2	99.0	98.8	98.7	98.7
USA	100.0	102.4	102.3	102.0	102.2	102.5	102.5	101.6	100.6
Intermediate goods									
EU–15	100.0	99.5	100.0	99.9	100.0	100.3	100.7	100.7	100.5
Japan	:	:	:	:	:	:	:	:	:
USA	:	:	:	:	:	:	:	:	:
Capital goods									
EU–15	100.0	101.8	102.7	102.8	102.8	102.9	102.9	103.0	103.2
Japan	:	:	:	:	:	:	:	:	:
USA	:	:	:	:	:	:	:	:	:
Consumer durables									
EU–15	100.0	102.5	103.0	102.8	102.9	102.8	103.0	102.9	103.4
Japan	:	:	:	:	:	:	:	:	:
USA	:	:	:	:	:	:	:	:	:
Consumer non-durables									
EU–15	100.0	102.0	103.4	103.7	104.0	104.1	104.1	104.3	104.4
Japan	:	:	:	:	:	:	:	:	:
USA	:	:	:	:	:	:	:	:	:

Source: eurostat

Domestic producer price index

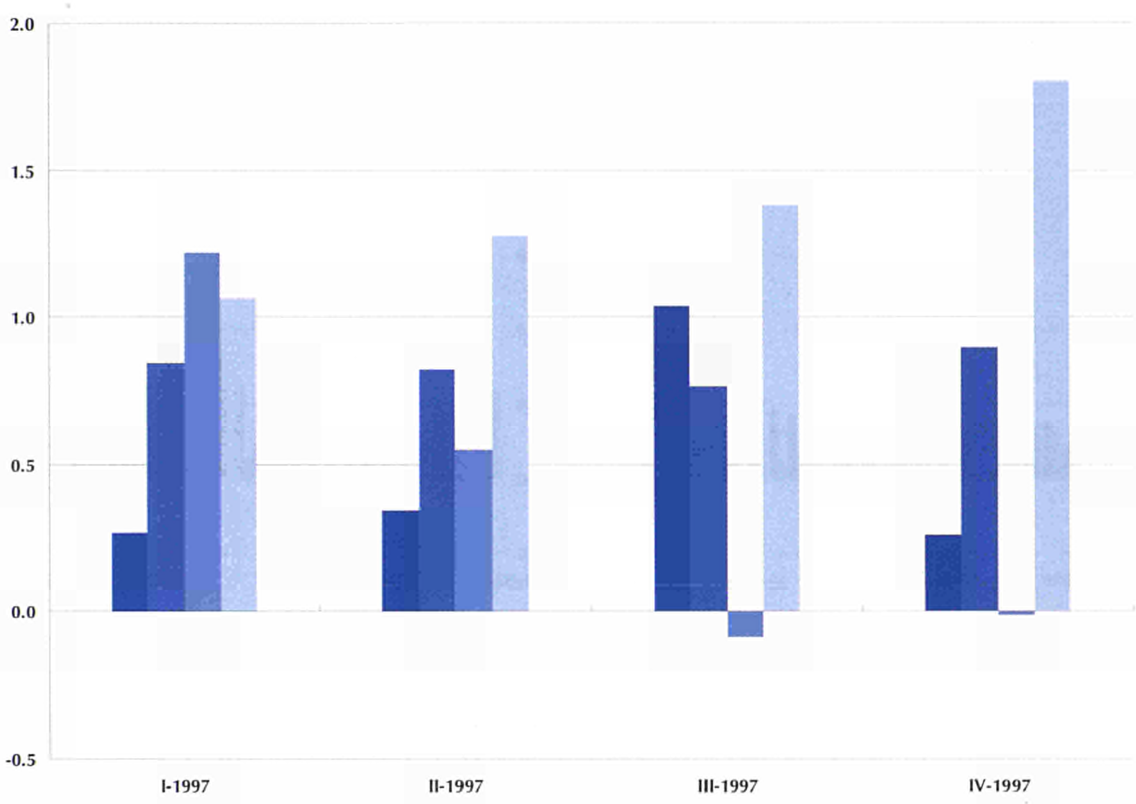


Figure 2.12

EU-15 domestic producer price index for the main industrial groupings: growth rate, year on year (%)

Intermediate goods
Capital goods
Consumer durables
Consumer non-durables

Source: eurostat

Table 2.9

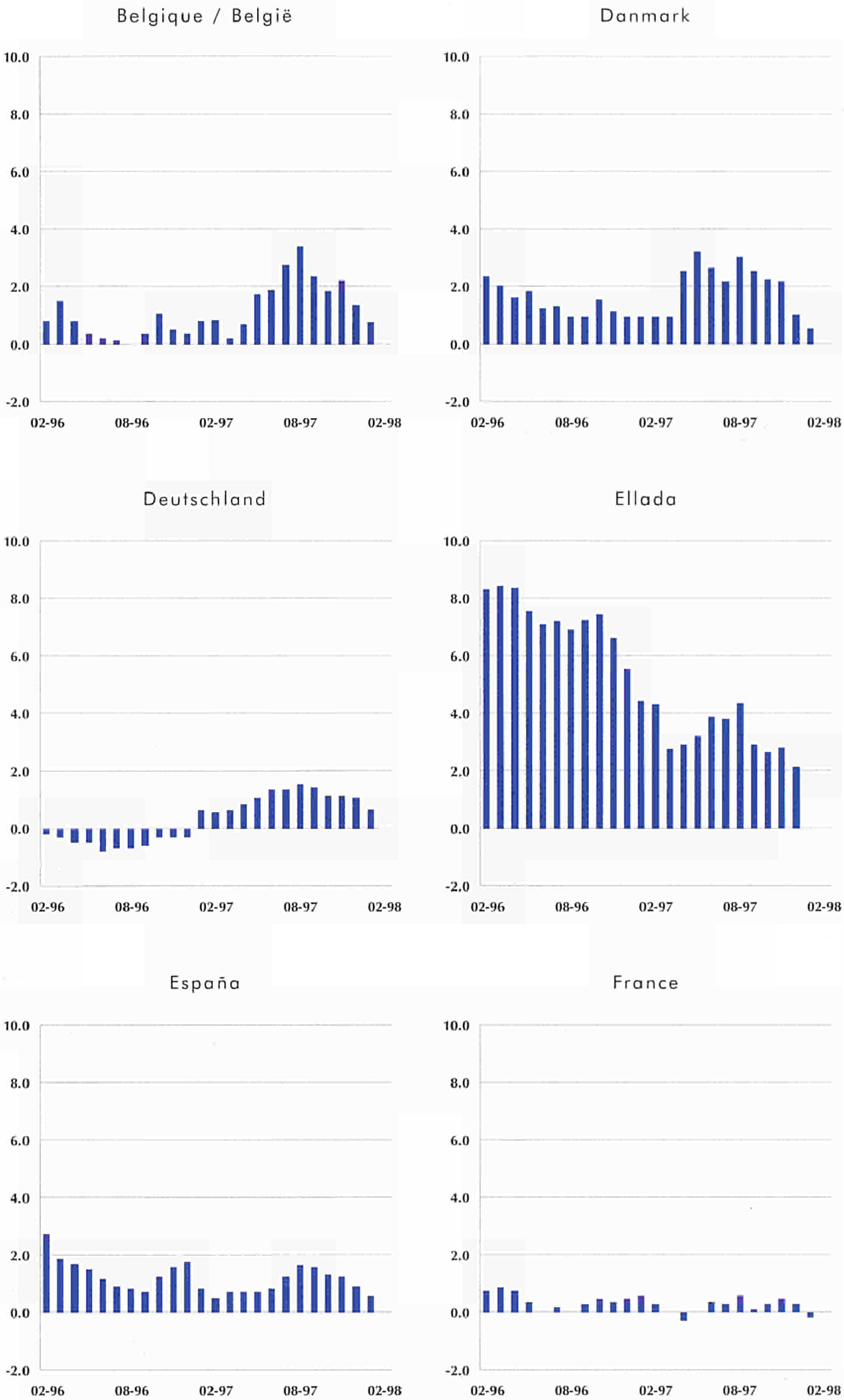
Domestic producer price index for the main industrial groupings: growth rate, year on year (%)

	Latest month available	Total industry	Intermediate goods	Capital goods	Consumer durables	Consumer non-durables
EU–15	01-98	0.7	-0.3	0.9	0.4	1.9
B	01-98	0.8	0.2	-0.2	:	4.4
DK	01-98	0.6	-0.7	2.9	1.6	1.0
D	01-98	0.7	0.4	0.6	0.3	1.6
EL	12-97	2.2	1.7	6.2	4.6	1.9
E	01-98	0.6	0.4	0.9	0.0	1.3
F	01-98	-0.2	-1.1	-0.5	0.0	1.6
IRL	01-98	0.0	:	:	:	0.5
I	01-98	1.3	0.6	1.6	0.8	2.6
L	12-97	2.9	7.5	1.4	0.0	-0.9
NL	02-98	1.2	0.3	1.6	1.4	3.6
A		:	:	:	:	:
P	12-97	0.5	-0.1	:	:	1.7
FIN	12-97	1.8	1.8	1.1	1.6	2.2
S	02-98	1.3	0.3	2.0	1.7	1.9
UK	02-98	0.9	-1.6	0.8	1.0	1.6
Japan	01-98	0.9	:	:	:	:
USA	01-98	-3.2	:	:	:	:

Source: eurostat

Figure 2.13

Domestic producer price index: growth rate, year on year (%)

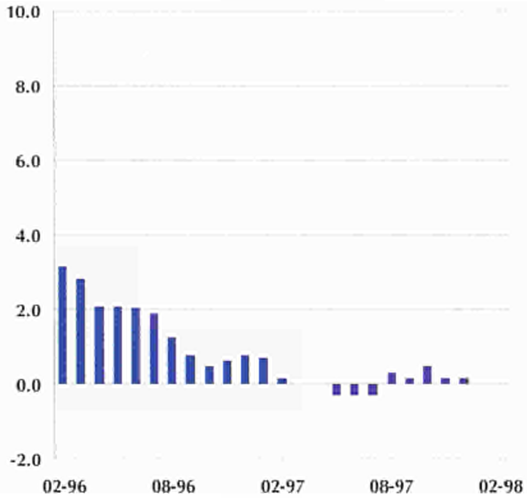


Source:

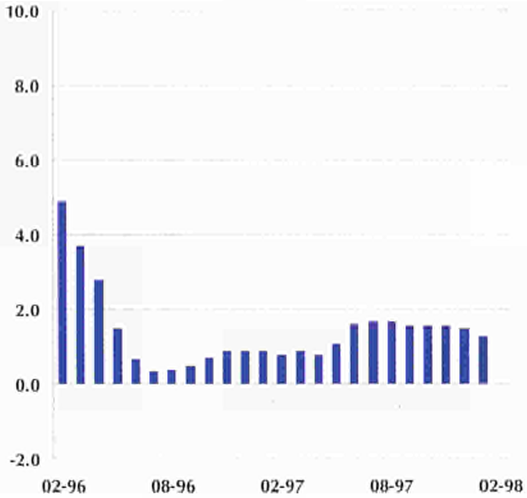
Figure 2.13

Domestic producer price index: growth rate, year on year (%)

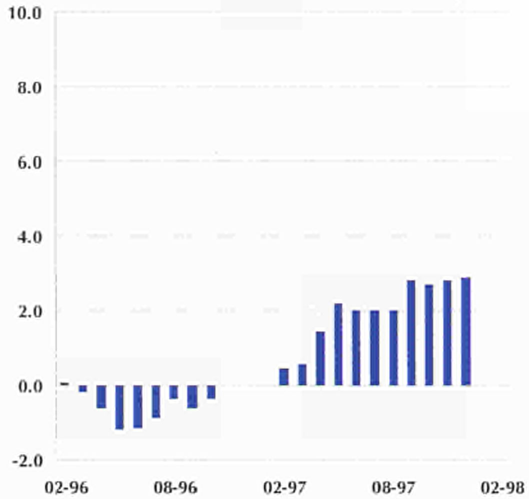
Ireland



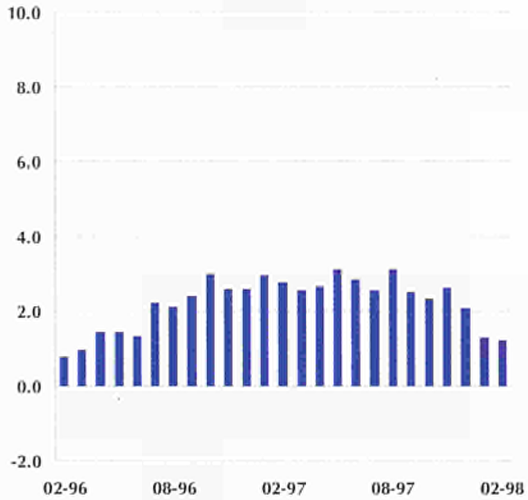
Italia



Luxembourg

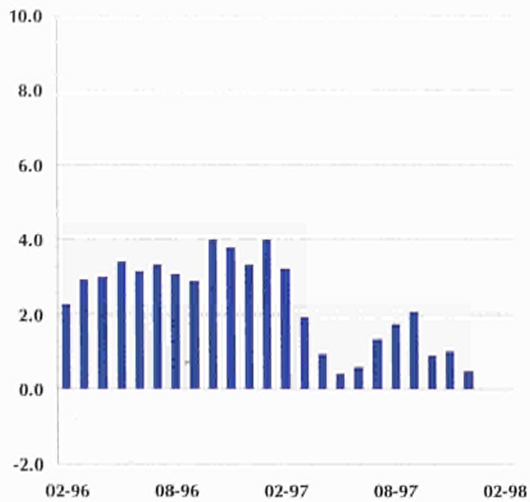


Nederland



Österreich

Portugal

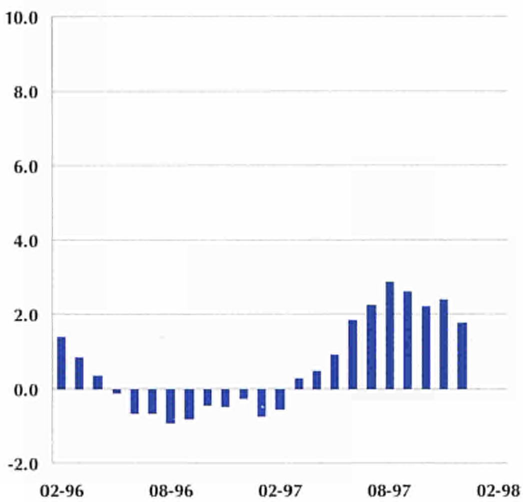


Source: eurostat

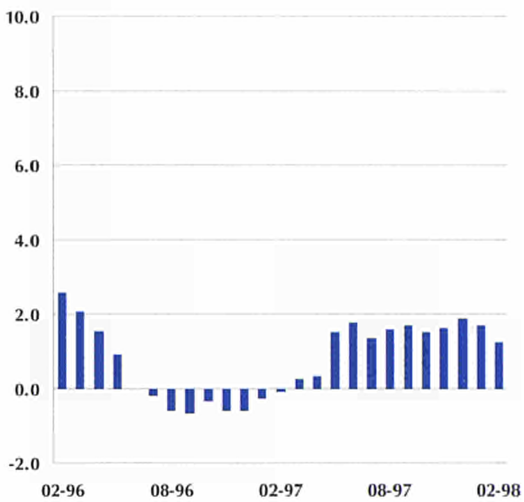
Figure 2.13

Domestic producer price index: growth rate, year on year (%)

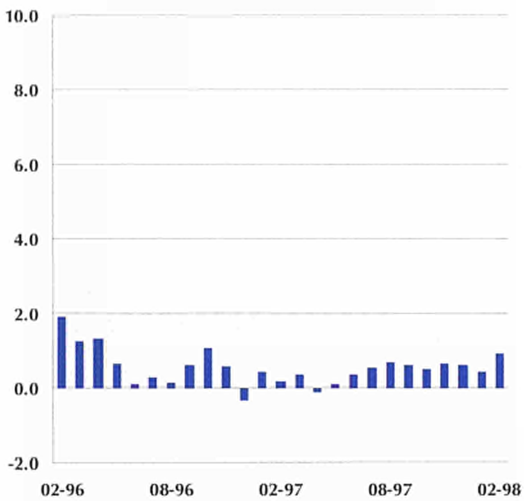
Suomi / Finland



Sverige



United Kingdom



Source: eurostat

Further information - price indices:

The index of domestic 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 (EU-14, since there are no producer price indices for Austria yet) 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.

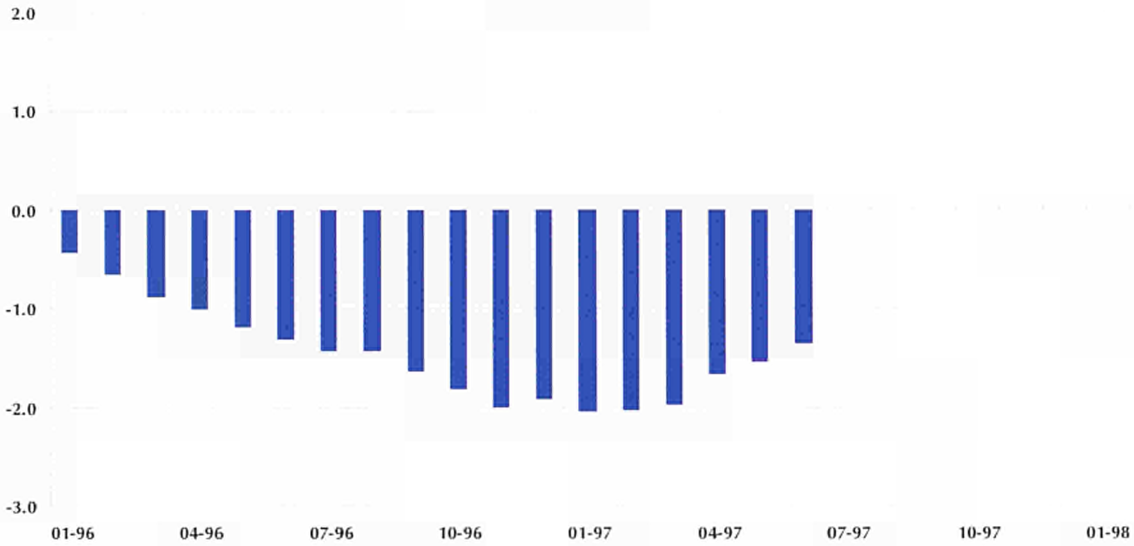
Full methodological notes may be found on page 73.

Employment index

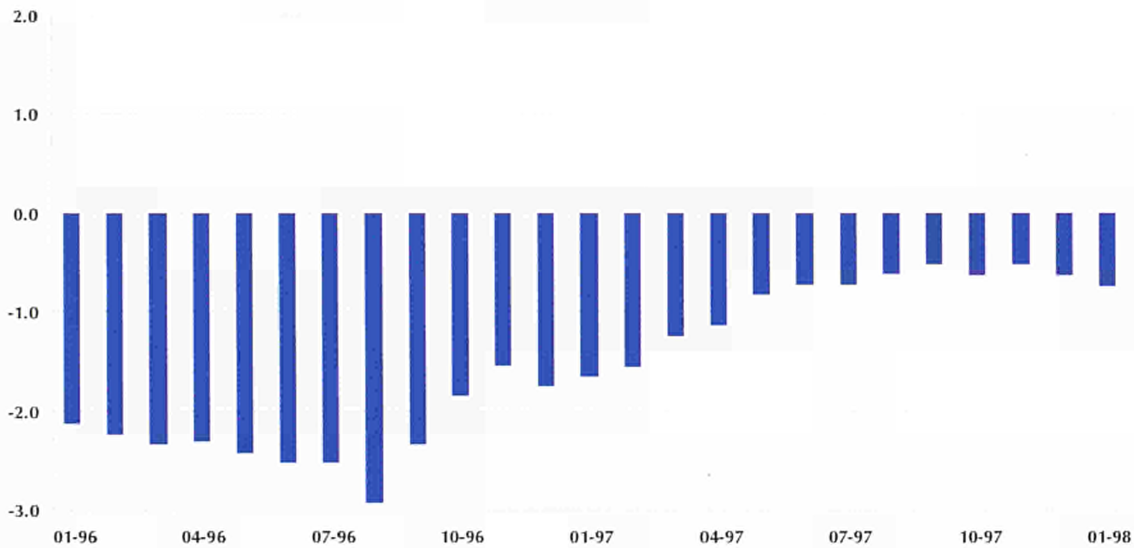
Figure 2.14

Employment index: growth rate, year on year (%)

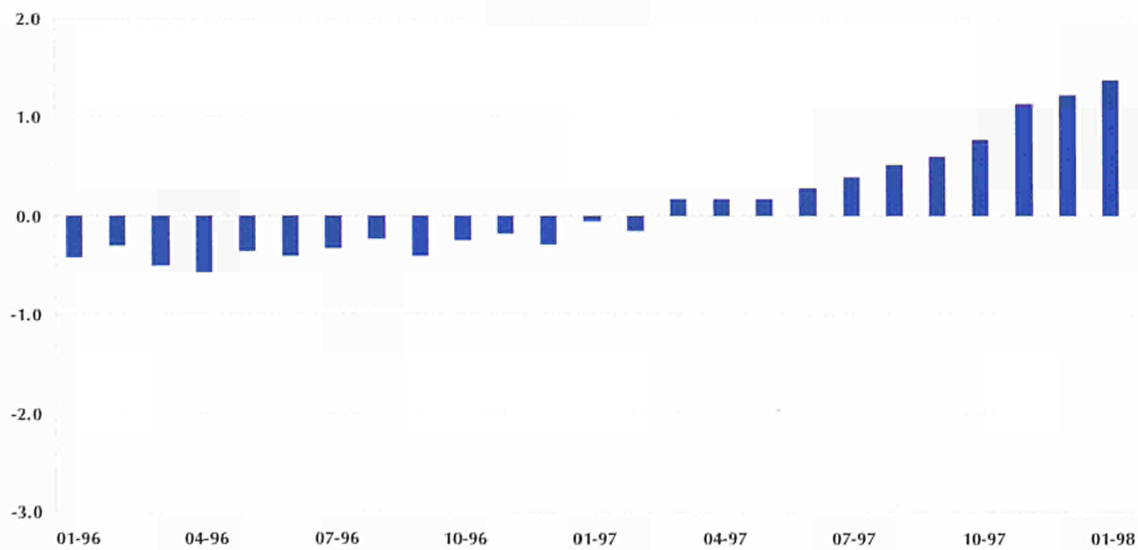
EU-15



Japan



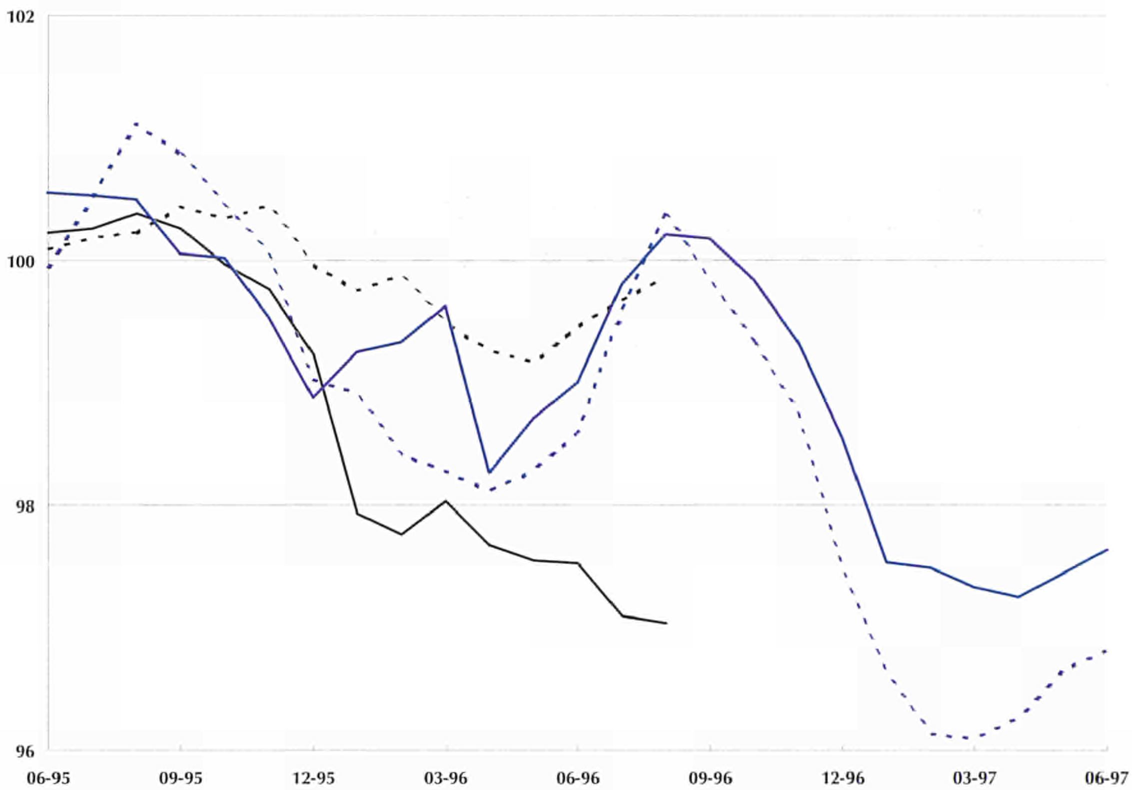
USA



Source: eurostat

Figure 2.15

EU-15 employment index for the main industrial groupings: indices (1995 = 100)



Source: eurostat

Table 2.10

Employment index for the main industrial groupings: growth rate, three months compared to the previous three months (%)

	Latest 3 months available			Total industry	Intermediate goods	Capital goods	Consumer durables	Consumer non-durables
EU-15	04-97	⇨	06-97	-0.1	:	:	-0.3	-0.2
B	09-97	⇨	11-97	0.1	0.2	-0.3	-1.3	0.6
DK	10-93	⇨	12-93	0.2	0.6	-0.3	:	0.0
D	10-97	⇨	12-97	-0.3	-0.6	-0.3	-0.7	-0.9
EL	04-97	⇨	06-97	0.0	-0.1	-4.5	0.9	-1.2
E	10-97	⇨	12-97	1.8	4.1	3.0	-1.2	0.3
F	07-97	⇨	09-97	:	:	0.2	-0.8	-0.5
IRL	01-97	⇨	03-97	1.8	1.3	3.4	:	:
I	04-97	⇨	06-97	-0.5	:	:	-0.7	-0.7
L	10-97	⇨	12-97	0.0	-0.1	1.6	-0.3	0.0
NL	07-96	⇨	09-96	-1.7	:	:	:	:
A	09-97	⇨	11-97	-0.4	-0.4	-0.7	-0.1	-1.0
P	10-97	⇨	12-97	-0.3	0.0	0.1	0.3	-0.4
FIN	04-96	⇨	06-96	0.2	:	:	:	:
S	07-97	⇨	09-97	0.6	:	:	:	:
UK	11-97	⇨	01-98	0.2	-0.8	0.3	0.8	0.1
Japan	11-97	⇨	01-98	-0.2	:	:	:	:
USA	11-97	⇨	01-98	0.6	:	:	:	:

Source: eurostat

Employment index

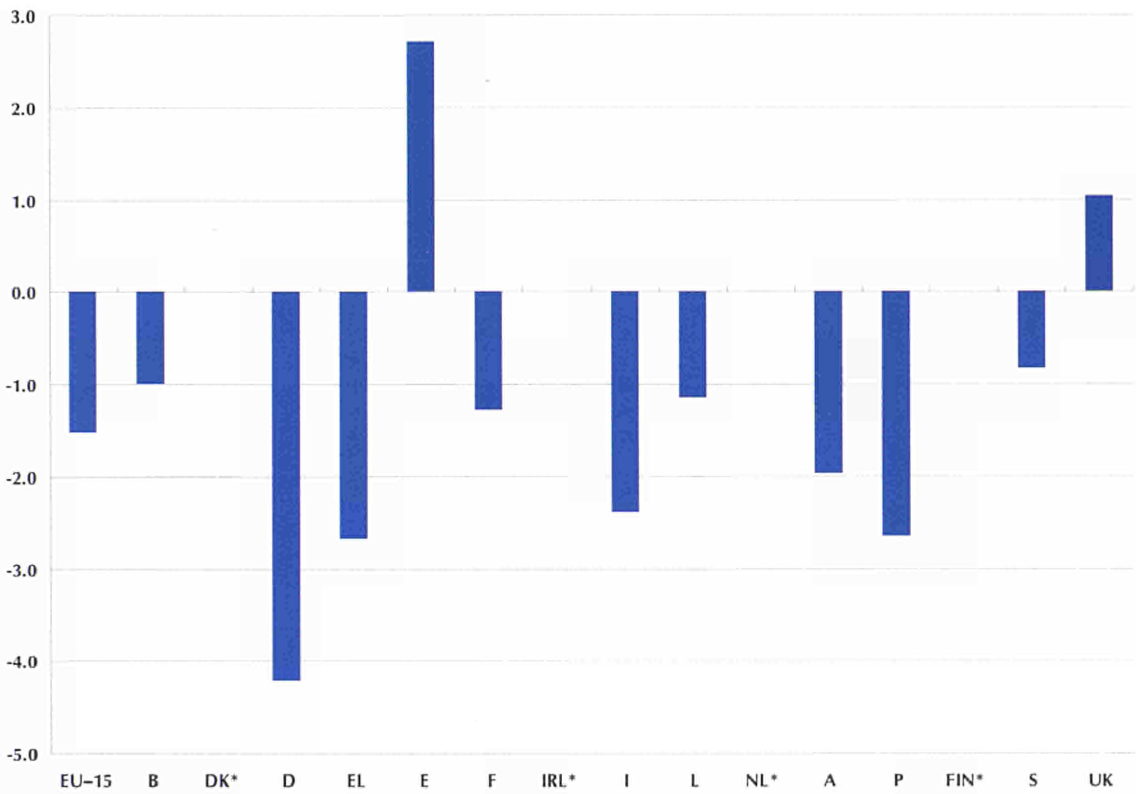


Figure 2.16

Employment index: growth rate, three months compared to the same three months of the previous year, 04-97 to 06-97 (%)

Source: eurostat

Table 2.11

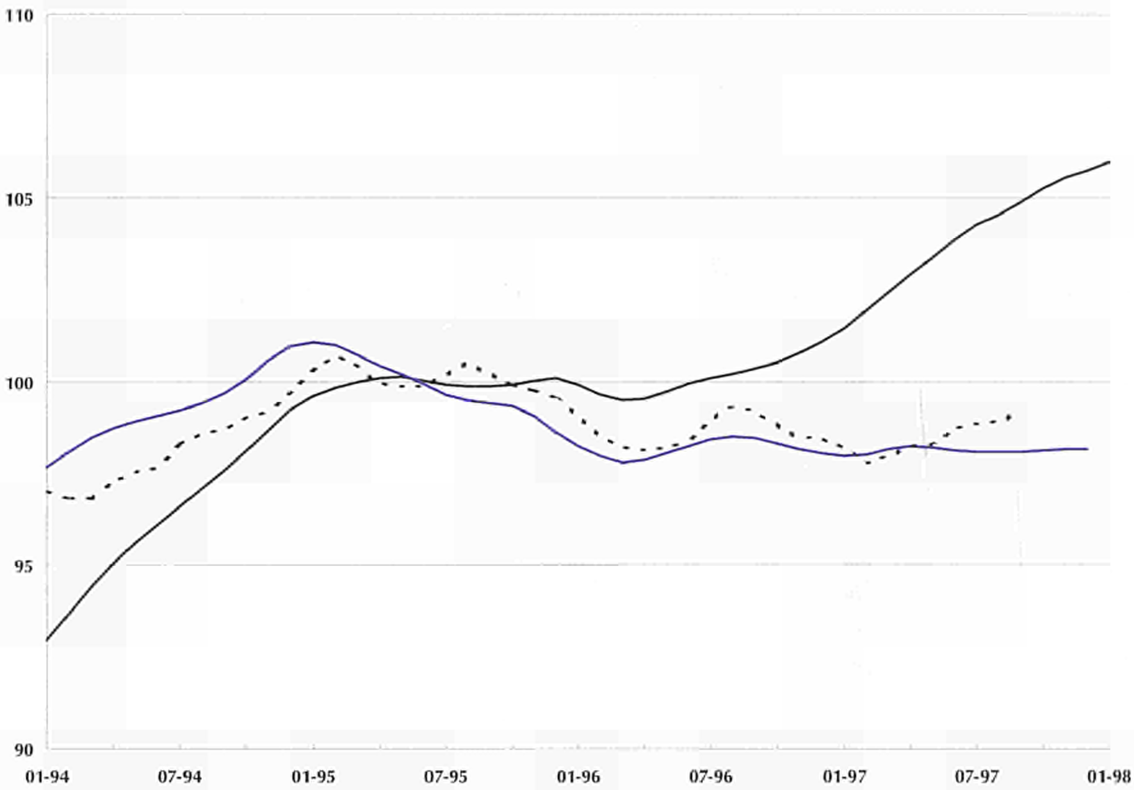
Employment index for the main industrial groupings: growth rate, three months compared to the same three months of the previous year (%)

	Latest 3 months available			Total industry	Intermediate goods	Capital goods	Consumer durables	Consumer non-durables
EU-15	04-97	⇨	06-97	-1.5	:	:	-1.2	-1.8
B	09-97	⇨	11-97	-0.5	0.2	-1.2	-4.8	0.1
DK		⇨		:	:	:	:	:
D	10-97	⇨	12-97	-2.2	-2.8	-2.1	-4.1	-4.2
EL	04-97	⇨	06-97	-2.7	-1.6	-2.3	0.5	-6.1
E	10-97	⇨	12-97	5.2	4.7	12.4	6.0	0.2
F	07-97	⇨	09-97	:	:	0.0	-2.8	-1.5
IRL	01-97	⇨	03-97	4.3	5.1	5.0	:	:
I	04-97	⇨	06-97	-2.4	:	:	-4.1	-4.1
L	10-97	⇨	12-97	0.3	-0.9	3.8	-1.0	1.8
NL	07-96	⇨	09-96	-0.4	:	:	:	:
A	09-97	⇨	11-97	-1.7	-1.8	2.1	-5.9	-4.4
P	10-97	⇨	12-97	-2.3	-0.3	0.2	1.1	-5.1
FIN	04-96	⇨	06-96	1.1	:	:	:	:
S	07-97	⇨	09-97	-0.3	:	:	:	:
UK	11-97	⇨	01-98	0.1	-1.3	1.5	-0.8	0.2
Japan	11-97	⇨	01-98	-0.6	:	:	:	:
USA	11-97	⇨	01-98	1.2	:	:	:	:

Source: eurostat

Figure 2.17

EU-15 production and employment trends in construction: indices (1995 = 100)



Total industry: production index

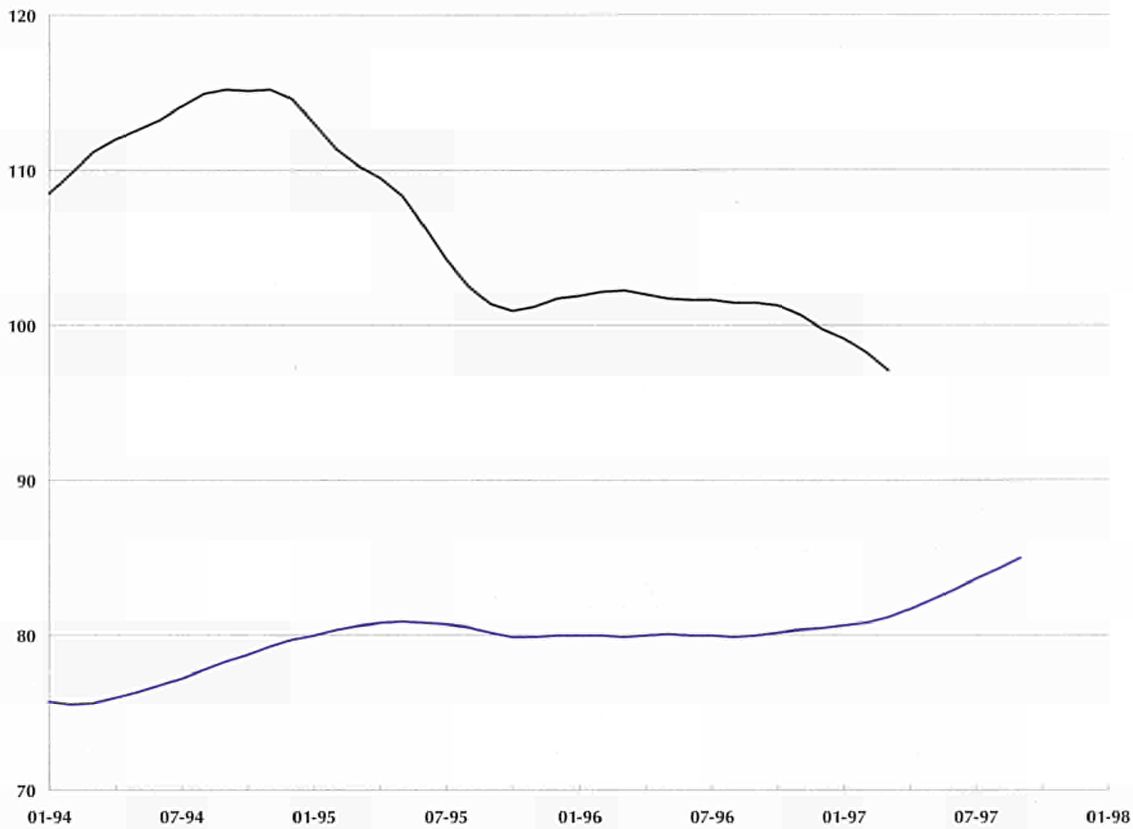
Construction: production index

Construction: employment index

Source: eurostat

Figure 2.18

EU-15 building permits; indices (1995 = 100)



Residential

Non-residential

Source: eurostat

Production index (working day adjusted & trend cycle)

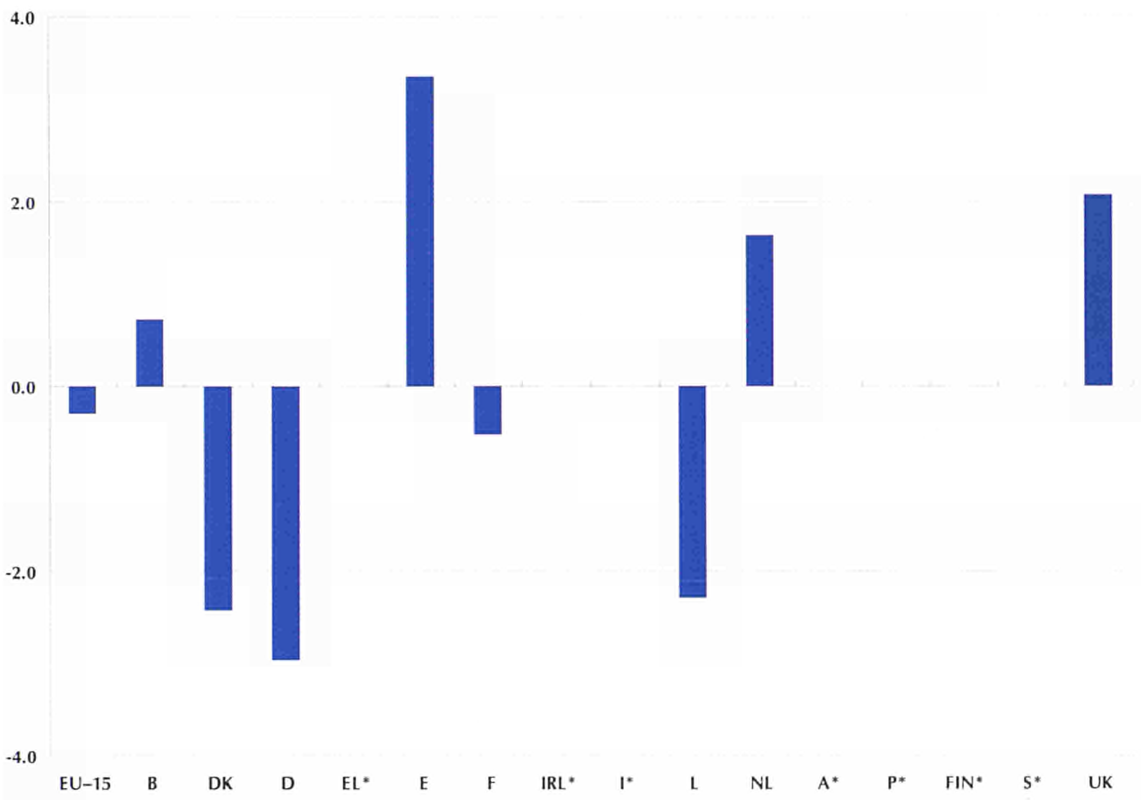


Figure 2.19

Production index for construction: growth rate, three months compared to the same three months of the previous year, 10-97 to 12-97 (%)

Source: eurostat

Table 2.12

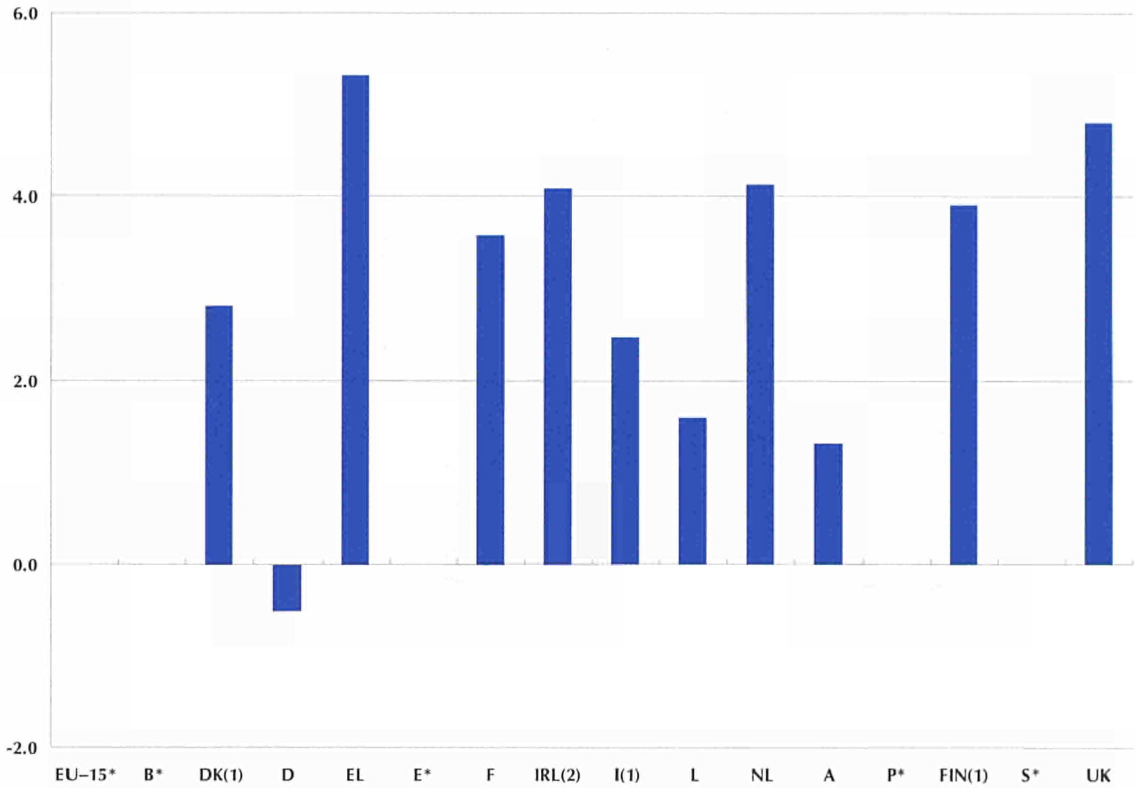
Production index of building and civil engineering: growth rates (%)

	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
EU-15	07-97	⇨	09-97	-0.5	-1.4	07-97	⇨	09-97	0.5	0.1
B	09-94	⇨	11-94	4.1	:	09-94	⇨	11-94	6.2	:
DK	10-97	⇨	12-97	-3.7	-5.4	10-97	⇨	12-97	1.7	8.5
D	11-97	⇨	01-98	3.0	-1.5	11-97	⇨	01-98	-0.8	4.2
EL		⇨		:	:		⇨		:	:
E	10-97	⇨	12-97	:	6.5	10-97	⇨	12-97	:	-0.7
F	11-97	⇨	01-98	-1.3	0.8	11-97	⇨	01-98	-0.9	1.4
IRL		⇨		:	:		⇨		:	:
I	07-97	⇨	09-97	-2.6	-6.3	01-97	⇨	03-97	1.2	:
L	10-97	⇨	12-97	-1.6	-3.8	10-97	⇨	12-97	-1.7	-0.8
NL	07-97	⇨	09-97	3.4	-0.1		⇨		:	:
A	07-97	⇨	09-97	2.1	1.5	07-97	⇨	09-97	-1.3	-1.6
P		⇨		:	:		⇨		:	:
FIN	07-97	⇨	09-97	-14.3	-10.0	07-97	⇨	09-97	-0.6	-3.0
S		⇨		:	:		⇨		:	:
UK	01-97	⇨	03-97	1.4	:	01-97	⇨	03-97	1.2	-3.6

Source: eurostat

Figure 2.20

Output prices for new residential buildings: growth rate, three months compared to the same three months of the previous year, 07-97 to 09-97 (%)



1) input prices
2) input prices and one-dwelling buildings

Source: eurostat

Table 2.13

Output prices for new residential buildings: indices (1995 = 100)

	II-1996	III-1996	IV-1996	I-1997	II-1997	III-1997	IV-1997	I-1998
EU–15	:	:	:	:	:	:	:	:
B	:	:	:	:	:	:	:	:
DK (1)	102.7	103.5	104.2	104.9	105.6	106.4	107.1	107.8
D	100.0	99.9	99.7	99.5	99.4	99.4	99.1	:
EL	105.6	106.2	107.4	110.1	110.7	111.9	113.2	:
E	:	:	:	:	:	:	:	:
F	101.1	101.2	102.8	102.9	104.2	104.8	:	:
IRL (3)	101.1	101.4	102.2	103.3	104.5	105.6	:	:
I (1)	100.8	102.5	103.1	103.3	103.5	105.0	105.3	:
L	100.7	101.0	101.0	102.1	102.1	102.7	102.7	:
NL	102.1	102.1	103.0	104.6	105.5	106.3	108.0	:
A	101.5	101.7	101.7	102.4	102.8	103.1	:	:
P	:	:	:	:	:	:	:	:
FIN (1)	99.1	99.8	100.3	101.4	102.5	103.7	103.7	:
S (2)	103.6	121.9	109.6	:	:	:	:	:
UK	101.4	102.4	103.4	105.4	106.4	107.4	109.3	:

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

Source: eurostat

Building permits - useful floor area

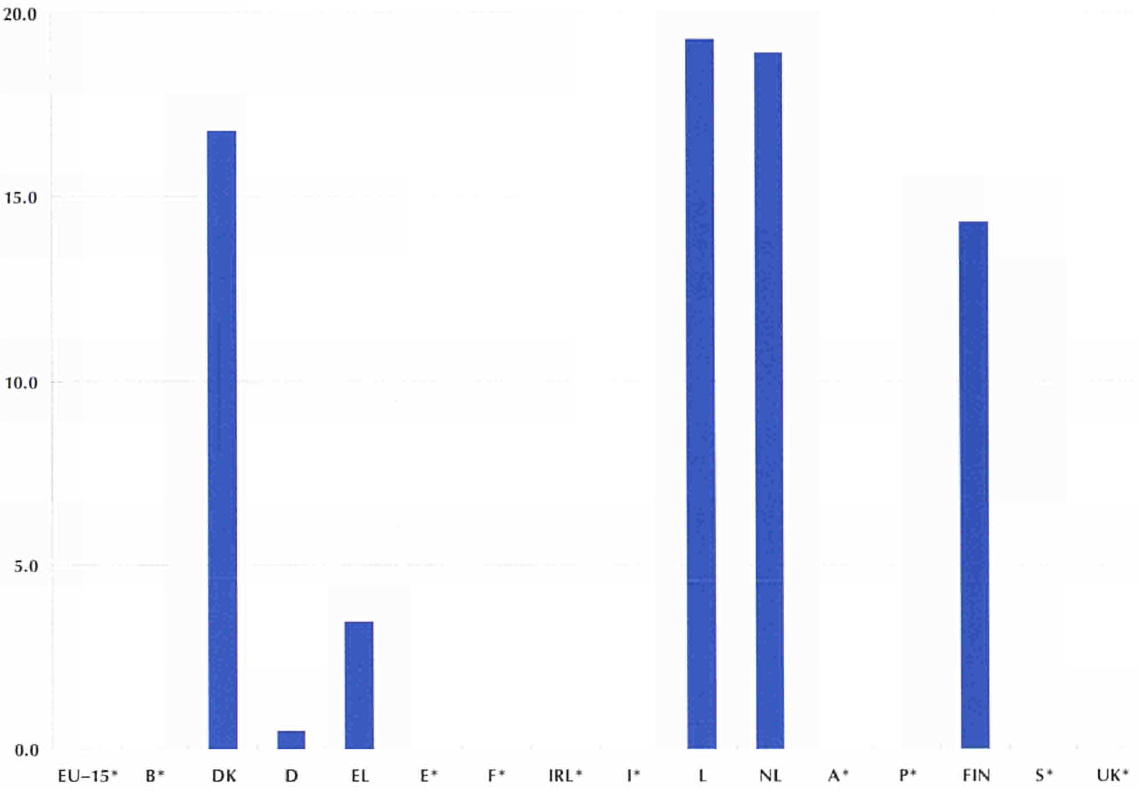


Figure 2.21

Building permits - useful floor area: growth rate, three months compared to the same three months of the previous year, 09-97 to 11-97 (%)

Source: eurostat

Table 2.14

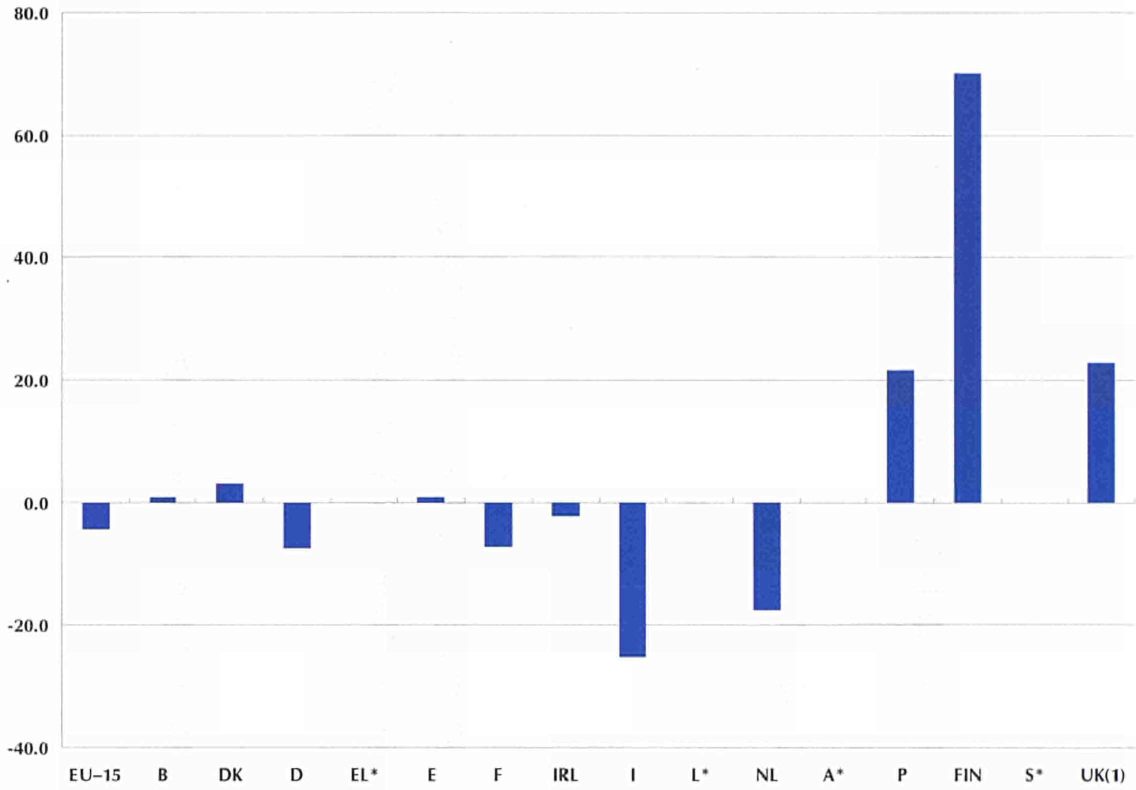
	Latest 3 months available			Residential '000m²	1995=100	Latest 3 months available			Non-residential '000m²	1995=100
EU-15		⇨		:	:	07-97	⇨	09-97	:	88.2
B	07-97	⇨	09-97	2,552	115.6	07-97	⇨	09-97	2,020	126.5
DK	10-97	⇨	12-97	476	124.5	10-97	⇨	12-97	1,121	105.8
D	10-97	⇨	12-97	12,195	88.4	10-97	⇨	12-97	10,343	96.0
EL	10-95	⇨	12-95	2,288	108.1	10-95	⇨	12-95	1,028	105.5
E	08-97	⇨	10-97	11,226	99.8	08-97	⇨	10-97	2,249	110.2
F		⇨		:	:	07-97	⇨	09-97	9,401	107.4
IRL	04-97	⇨	06-97	1,424	151.4	04-97	⇨	06-97	852	131.0
I	01-97	⇨	03-97	2,663	70.7	01-97	⇨	03-97	3,409	58.6
L	10-97	⇨	12-97	:	154.1	10-97	⇨	12-97	:	89.5
NL	10-97	⇨	12-97	4,978	126.1	10-97	⇨	12-97	5,121	144.8
A		⇨		:	:		⇨		:	:
P		⇨		:	:		⇨		:	:
FIN	11-97	⇨	01-98	443	94.2	11-97	⇨	01-98	428	76.2
S	11-97	⇨	01-98	294	:	11-97	⇨	01-98	487	:
UK		⇨		:	:		⇨		:	:

Building permits - useful floor area: actual values and indices

Source: eurostat

Figure 2.22

Building permits - no. of dwellings: growth rate, three months compared to the same three months of the previous year, 01-97 to 03-97 (%)



1) buildings starts

Source: eurostat

Table 2.15

Number of dwellings authorised (units)

	Latest year available	no. of dwellings	Latest month available	no. of dwellings	no. of dwellings per 1,000 inhabitants	Index, 1995 = 100
EU-15		:	03-97	:	:	96.7
B	1996	48,707	09-97	5,510	0.54	147.1
DK	1997	**16,711**	12-97	**1,130**	**0.22**	**117.4**
D	1997	530,263	12-97	45,218	0.55	84.9
EL	1995	70,865	12-95	6,326	0.61	107.1
E	1996	265,956	10-97	26,847	0.69	114.0
F	1996	304,186	11-97	25,600	0.44	99.7
IRL (1)	1996	34,864	06-97	:	:	149.1
I	1996	**160,553**	03-97	**10,560**	**0.18**	**73.0**
L	1996	2,797	02-97	204	0.50	91.5
NL	1997	101,501	12-97	9,675	0.63	118.0
A		:		:	:	:
P	1996	84,609	11-97	7,544	:	117.7
FIN	1997	30,913	01-98	1,556	:	102.3
S	1997	11,168	01-98	321	:	:
UK (2)	1997	188,800	01-98	14,300	:	102.3

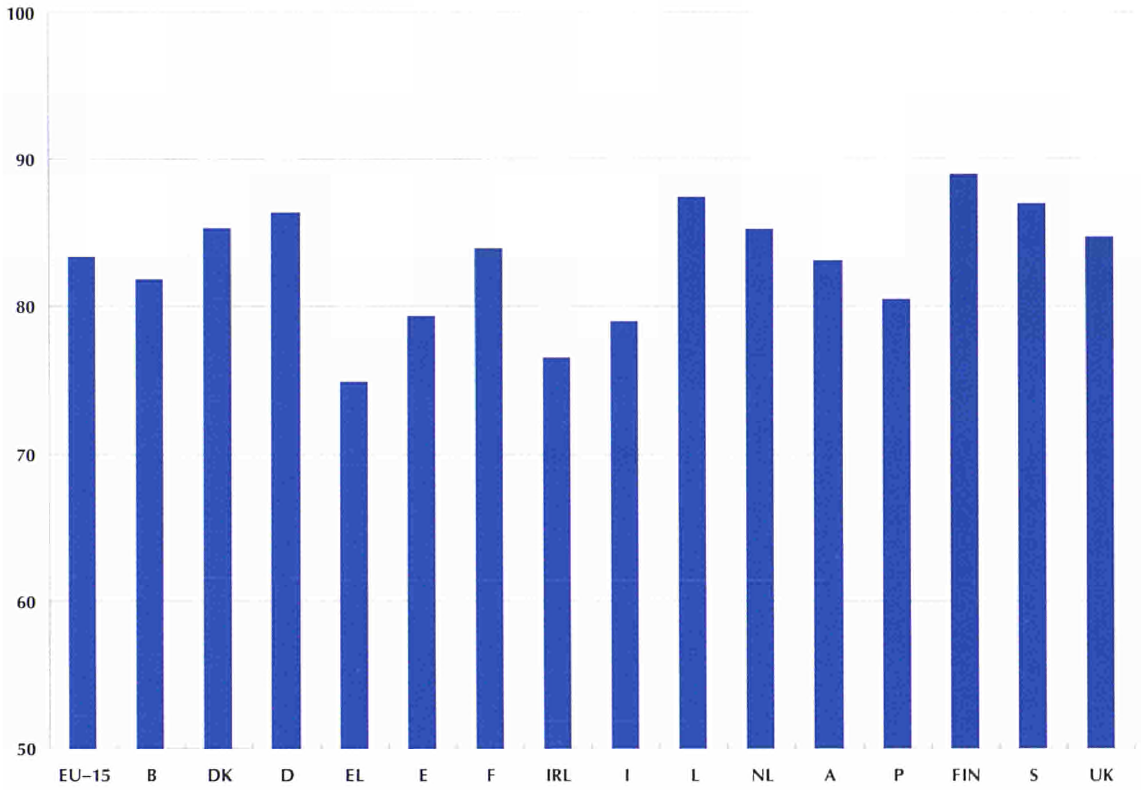
1) quarterly data
2) buildings starts

Source: eurostat

Capacity utilisation rates

Figure 2.23

Capacity utilisation rates: 01-98 (%)



Source: DG II, Business Survey

Table 2.16

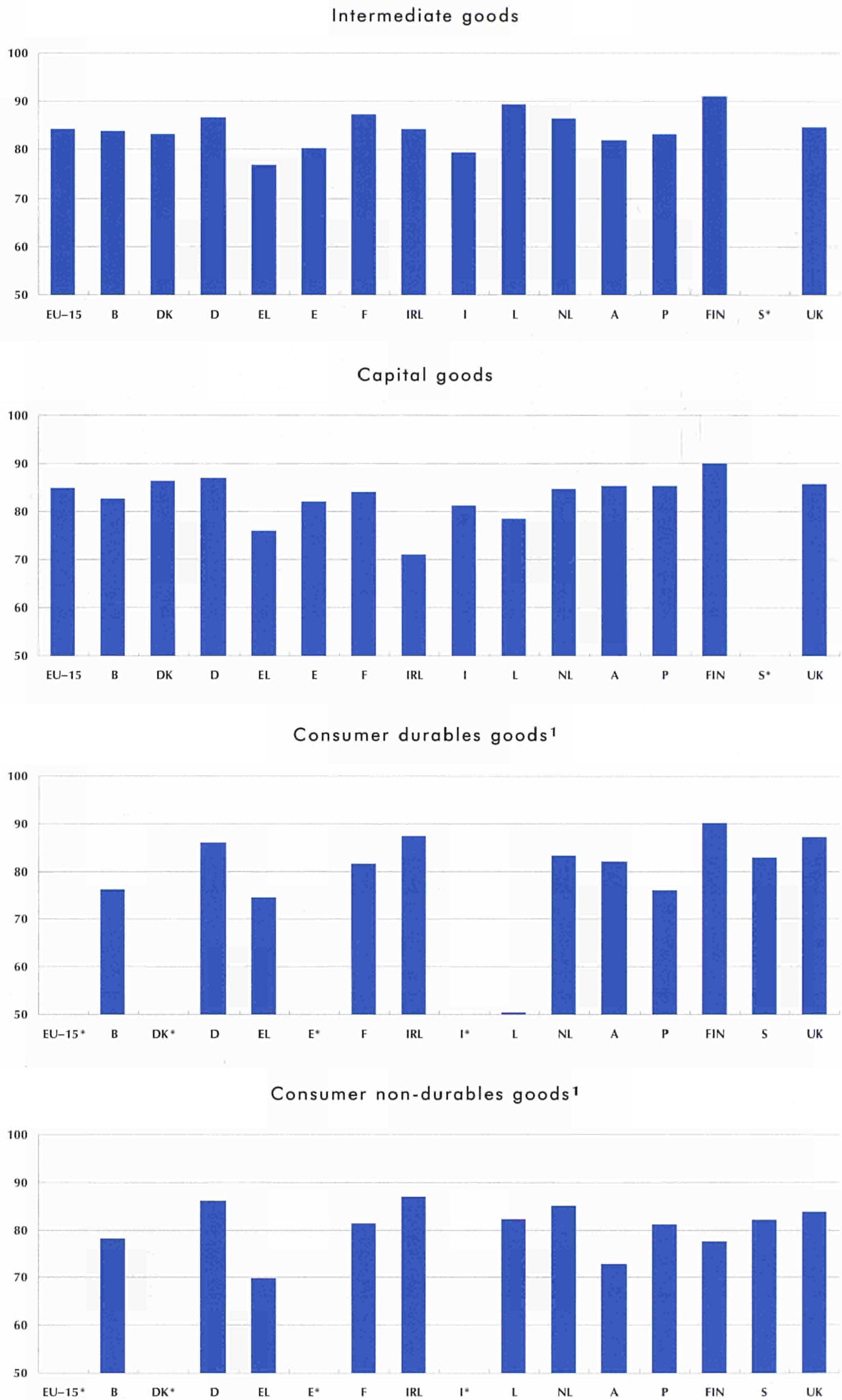
Capacity utilisation rates (%)

	Growth rate: latest month, t / t-12 (%)	04-97	07-97	10-97	01-98
EU-15	3.2	81.7	82.6	83.4	83.4
B	2.0	80.3	82.4	83.2	81.9
DK	4.1	82.0	85.0	84.0	85.4
D	4.9	84.6	85.5	86.3	86.4
EL	-0.3	72.1	76.3	74.3	75.0
E	3.0	77.3	78.9	80.5	79.4
F	0.7	82.8	83.8	84.8	84.0
IRL	-0.4	80.5	73.0	74.2	76.6
I	5.2	76.2	77.7	77.7	79.0
L	10.8	82.7	84.5	84.8	87.5
NL	1.8	83.8	84.9	85.2	85.3
A	4.1	80.7	83.5	84.0	83.1
P	-1.1	80.3	80.2	81.9	80.5
FIN	3.9	86.9	87.0	89.0	89.0
S	0.0	84.0	87.0	85.0	87.0
UK	2.3	83.5	83.8	85.1	84.7

Source: DG II, Business Survey

Figure 2.24

Capacity utilisation rates for the main industrial groupings, 01-98
(%)



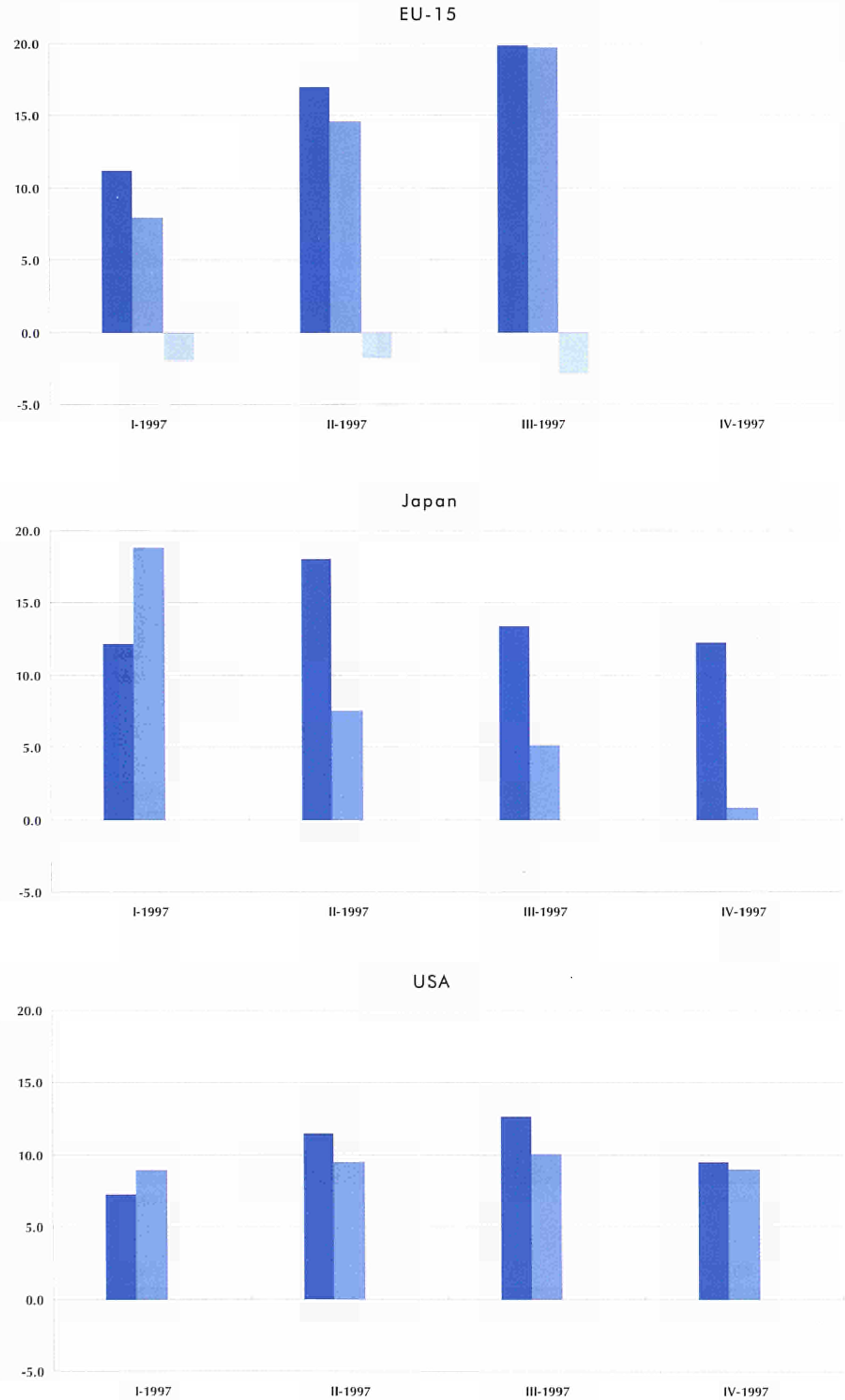
1) data is for 04-97

Source: DG II, Business Survey

Foreign trade indices

Figure 2.25

Foreign trade indices: growth rate, three months compared to the same three months of the previous year (%)



Export value

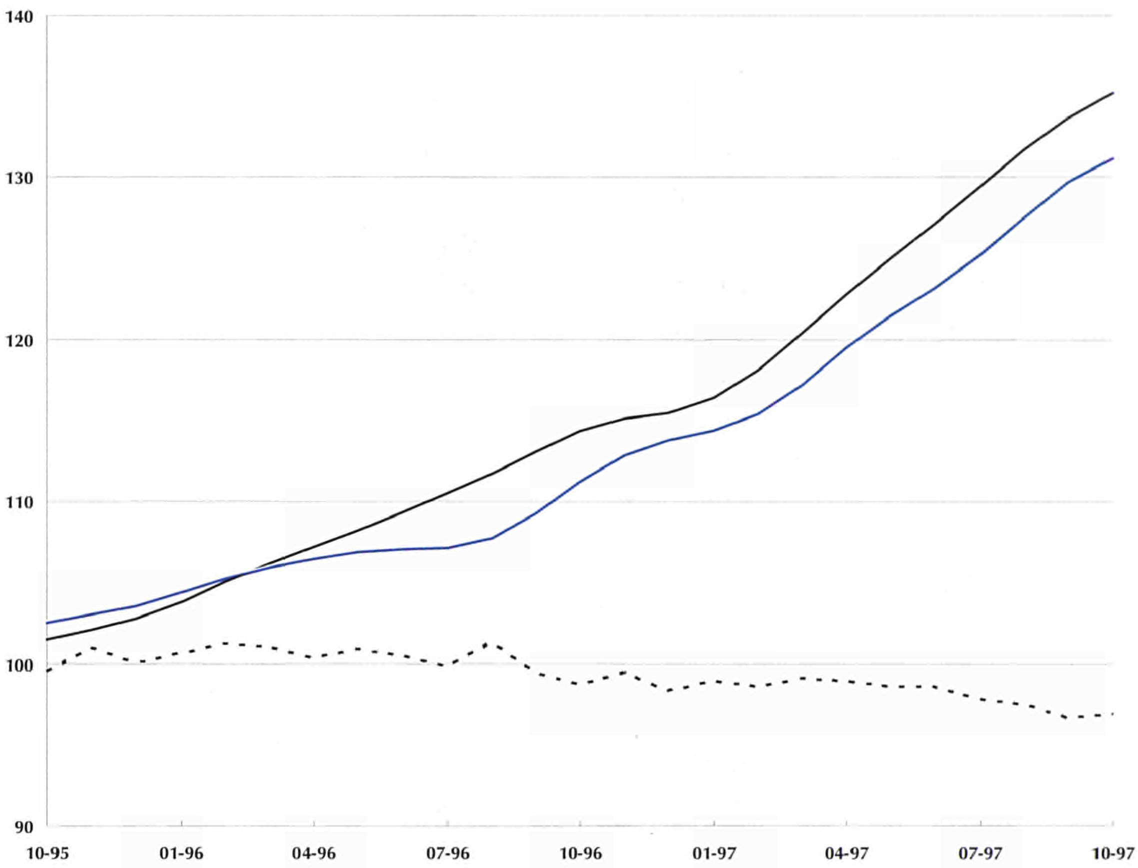
Import value

Terms of trade

Source: eurostat

Figure 2.26

EU-15 foreign trade indices in ECU terms (1995 = 100)



Source: eurostat

Table 2.17

Foreign trade indices (value indices are in ECU terms): growth rate, three months compared to the previous three months (%)

	Latest 3 months available			Exports Value	Exports Volume	Imports Value	Imports Volume	Terms of trade
EU–15	08-97	⇨	10-97	5.0	3.1	5.0	2.3	-1.4
B/L	09-97	⇨	11-97	2.2	1.2	2.5	1.2	-0.5
DK	09-97	⇨	11-97	1.7	0.9	5.3	0.4	1.2
D	07-97	⇨	09-97	2.8	1.9	3.7	1.4	-0.8
EL	07-97	⇨	09-97	1.9	1.3	4.3	-2.2	-0.2
E	09-97	⇨	11-97	3.9	2.0	6.5	5.6	1.2
F	09-97	⇨	11-97	3.2	1.9	3.2	1.5	-0.4
IRL	08-97	⇨	10-97	7.3	5.7	4.1	3.0	1.5
I	08-97	⇨	10-97	3.6	1.7	5.0	3.2	-1.2
NL	08-97	⇨	10-97	2.1	0.9	:	-2.8	0.2
A		⇨		:	:	:	:	:
P	08-97	⇨	10-97	3.0	0.9	2.8	0.9	-0.9
FIN		⇨		:	:	:	:	:
S		⇨		:	:	:	:	:
UK	09-97	⇨	11-97	0.0	-0.3	0.4	0.8	0.9

Source: eurostat

Foreign trade indices

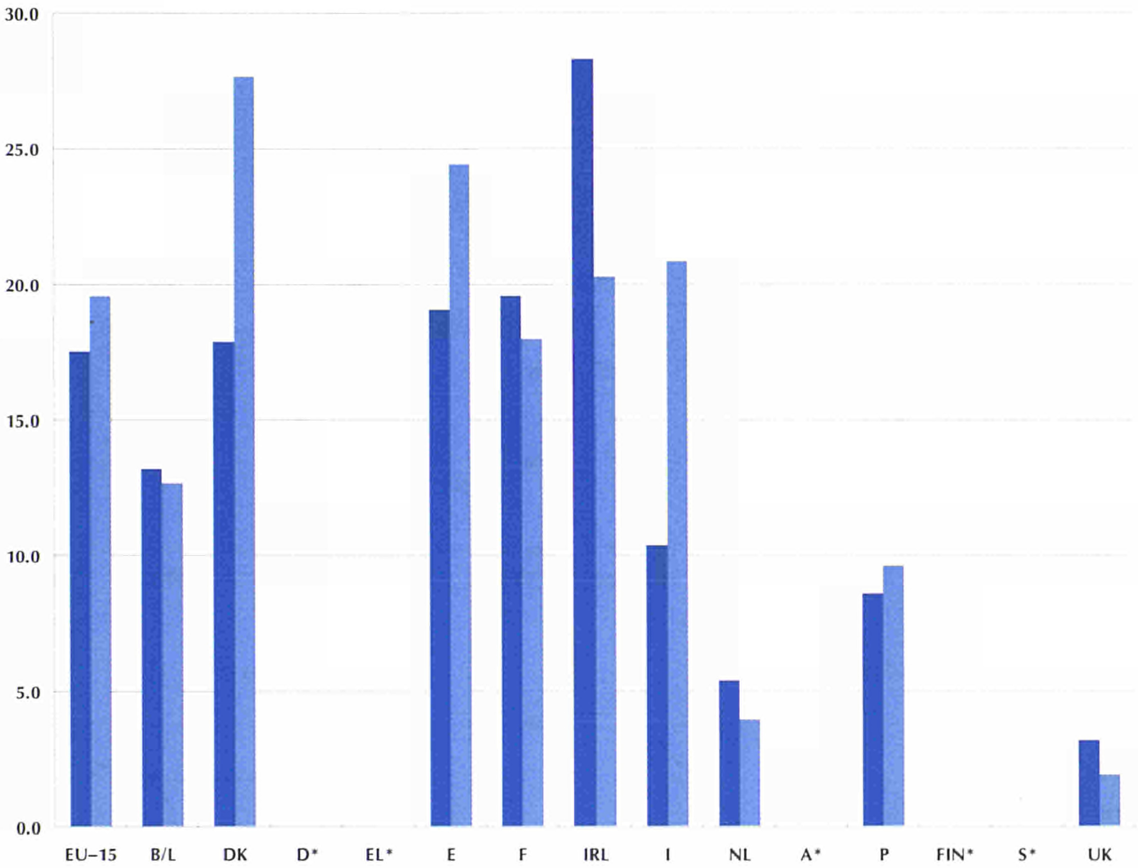


Figure 2.27

Foreign trade indices (in ECU terms): growth rate, three months compared to the same three months of the previous year, 08-97 to 10-97 (%)

Source: eurostat

Table 2.18

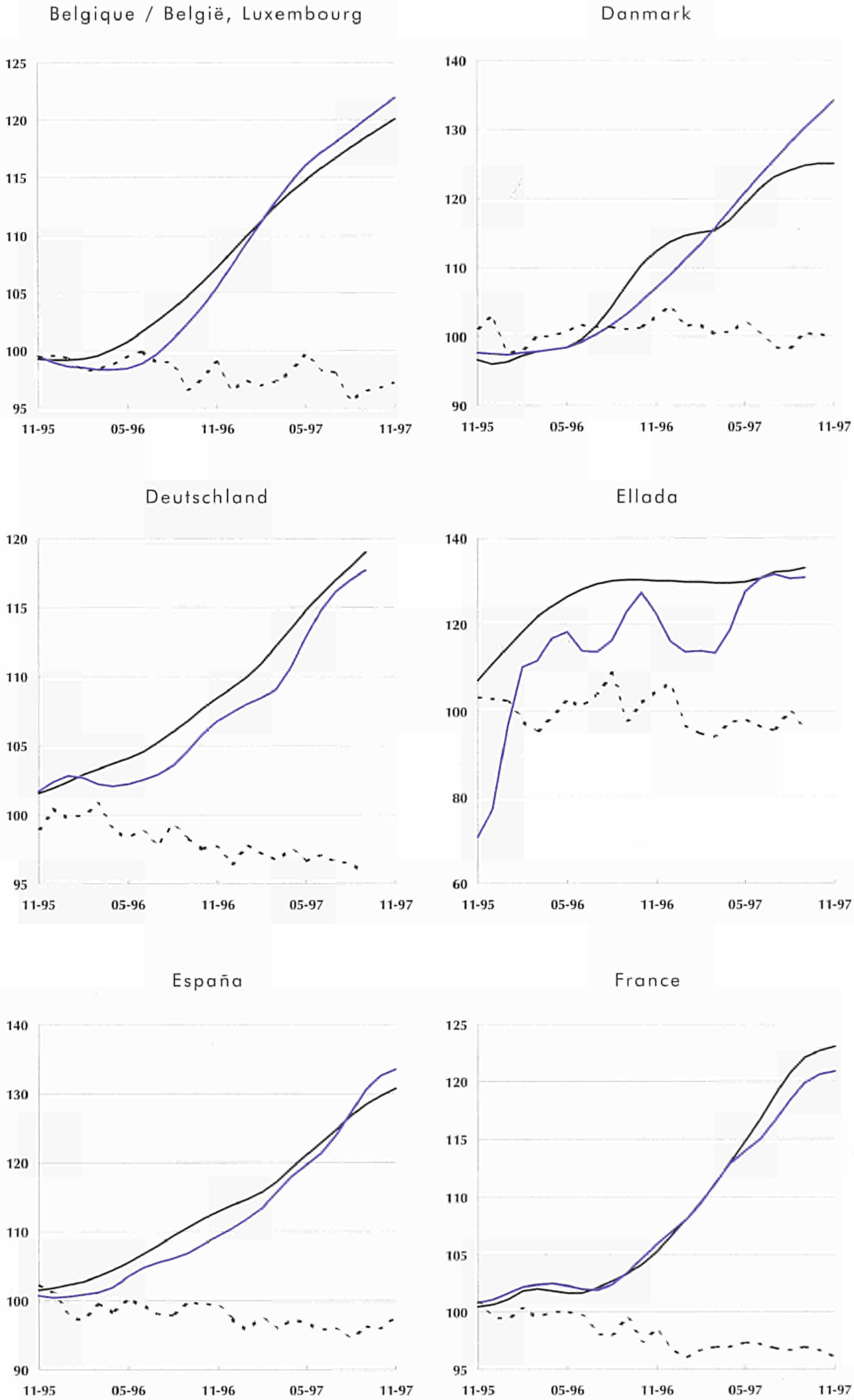
	Latest 3 months available			Exports Value	Exports Volume	Imports Value	Imports Volume	Terms of trade
EU-15	08-97	⇨	10-97	17.5	11.0	19.6	9.8	-2.8
B/L	09-97	⇨	11-97	3.8	-1.5	6.7	0.5	-0.8
DK	09-97	⇨	11-97	12.4	5.0	24.4	14.4	-1.5
D	07-97	⇨	09-97	13.0	8.5	14.2	7.3	-2.1
EL	07-97	⇨	09-97	6.5	-0.5	12.2	-1.5	-6.2
E	09-97	⇨	11-97	17.2	14.1	23.8	16.9	-2.9
F	09-97	⇨	11-97	18.1	14.0	14.6	8.6	-1.9
IRL	08-97	⇨	10-97	28.3	31.3	20.2	17.1	-5.3
I	08-97	⇨	10-97	10.4	7.1	20.8	16.4	-0.8
NL	08-97	⇨	10-97	5.4	-5.1	3.9	-5.9	0.6
A		⇨		:	:	:	:	:
P	08-97	⇨	10-97	8.6	1.9	9.6	2.7	-0.6
FIN		⇨		:	:	:	:	:
S		⇨		:	:	:	:	:
UK	09-97	⇨	11-97	2.2	5.1	2.7	6.4	0.6

Foreign trade indices (value indices are in ECU terms): three months compared to the same three months of the previous year (%)

Source: eurostat

Figure 2.28

Foreign trade indices in ECU terms (1995 = 100)



Export value index

Import value index

Terms of trade

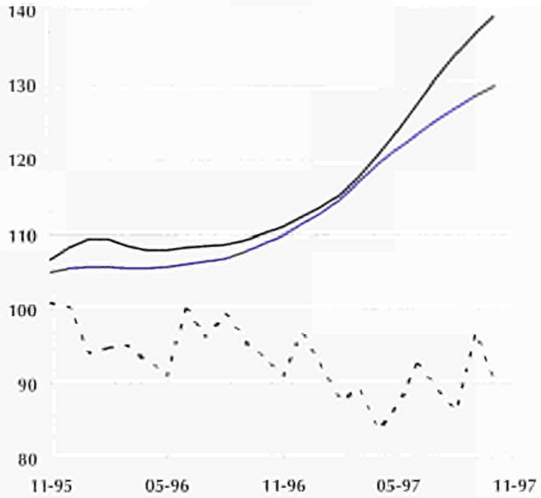
Source: eurostat

Foreign trade indices (trend cycle)

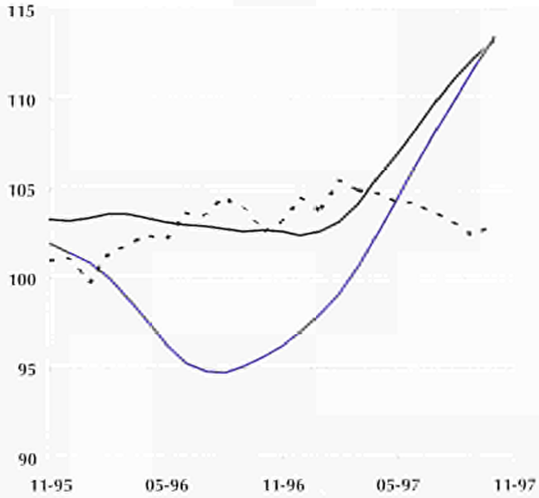
Figure 2.28

Foreign trade indices in ECU terms (1995 = 100)

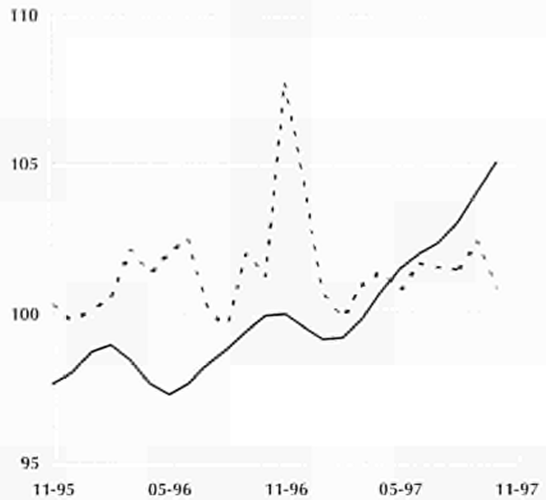
Ireland



Italia



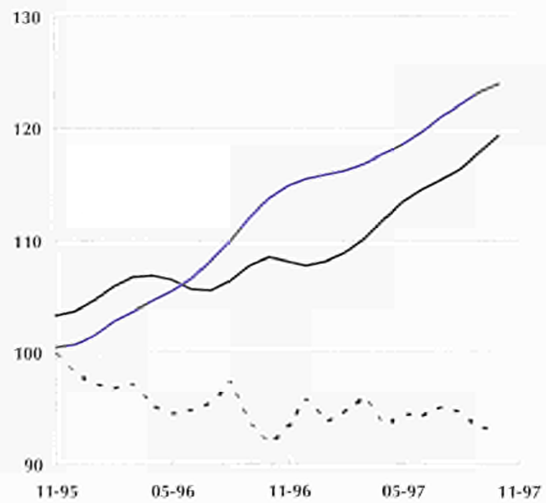
Nederland



Österreich

Not available

Portugal



Suomi / Finland

Not available

Export value index

Import value index

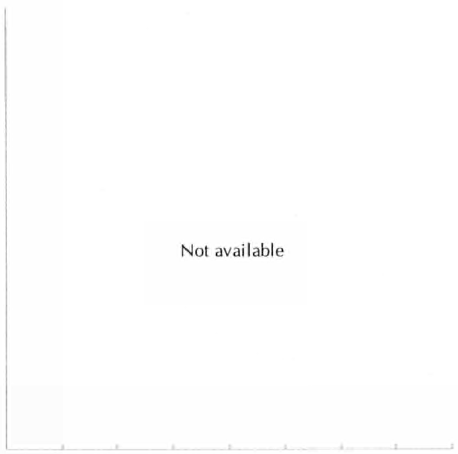
Terms of trade

Source: eurostat

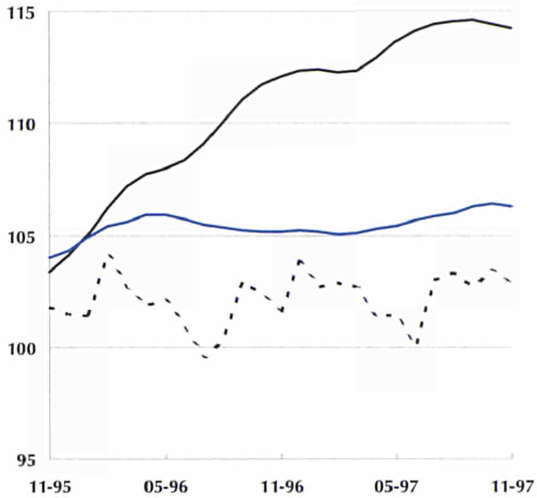
Figure 2.28

Foreign trade indices in ECU terms (1995 = 100)

Sverige



United Kingdom



Export value index ———

Import value index ———

Terms of trade - - - - -

Further information - employment, construction and trade indices:

Figures showing the number of persons employed include all persons employed by the firm (manual workers and salaried employees on the firm's payroll) plus the self-employed.
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 EU-15 refer only to extra-Union trade, the indices for Member States reflect also intra-Union trade.
Full methodological notes may be found on page 73.

Source: eurostat

3. Food products, beverages and tobacco

3. Food products, beverages and tobacco

Description of the NACE Rev.1 groups in divisions 15 & 16:

15.1: production, processing and preserving of meat and meat products;
15.2: processing and preserving of fish and fish products;
15.3: processing and preserving of fruit and vegetables;
15.4: manufacture of vegetable and animal oils and fats;
15.5: manufacture of dairy products;
15.6: manufacture of grain mill products, starches and starch products;
15.7: manufacture of prepared animal feeds;
15.8: manufacture of other food products;
15.9: manufacture of beverages;
16.0: manufacture of tobacco products

Data marked with this symbol is available on the diskette - for further details see page 72

Enquiries regarding the purchase of data should be directed to:

Eurostat Data-Shop
4, rue Alphonse Weicker
L - 2014 Luxembourg
tel: (352) 4335 2251
fax: (352) 4335 22221
e-mail: agnesn@eurostat.datashop.lu

Production is improving slightly in the majority of the EU Member States at the start of 1998

In January 1998, the three-month on three-month growth rate of the trend of the production index for the food, drink and tobacco industry showed an increased by 0.7% for EU-15 compared to 0.8% one month before. For the last year, the rhythm of growth of the production index decelerated from February to June/July. Although the growth rate of production equalled 1.0% both in January and February 1997, the production trend remained constant between June and July with growth rates corresponding to 0.1%. Production has since increased slightly with three-month on three-month growth rates of 0.8% in November and December 1997.

Looking at the Member States individual evolution of production in the food, drink and tobacco industry: Germany experienced a period of constant production between February 1997 and August 1997. During this period, three-month growth rates for the production trend compared with the three-months were almost stationary. However, between January 1996 and February 1997, production was increasing slightly with a maximum rate of growth of 0.7% in August 1996. Since July 1997, the production trend has been increased again, accelerating from 0.1% growth rate in August 1997 to 0.5% by January 1998.

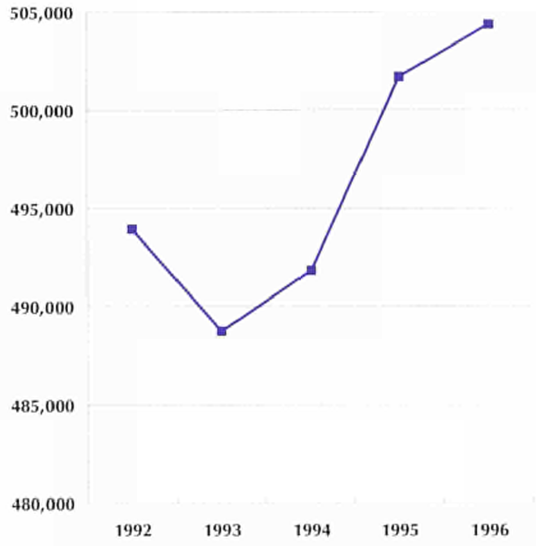
The French production trend has been growing at a regular pace for the last two years with three-month growth rates between 0.4% and 0.7%. Growth equalled 0.7% in December 1997, falling to 0.6% in January 1998.

After a period when the production trend was seen to be declining to the summer of 1996, Italy has since recovered with positive growth rates through to September 1997, with growth of 0.9%. Growth has since slowed down at a rate of about 0.1 percentage points per month to 0.6% by January 1998.

During 1997, the United Kingdom experienced a moderate period of growth in the production trend. In the first half of the year, the rhythm slowed down from 0.5% in January 1997 to 0.3% by May. Growth remained constant through to October 1997, with the latest data available for January 1998 recording an increase of only 0.1%.

Figure 3.1

EU-15 production in constant prices (million ECU)



Source: eurostat

In January 1998, the highest growth rate among the Member States for which data was available was in Denmark, up by 1.1%. Nevertheless, the rhythm of growth was higher for Denmark during the spring of 1997 with, for example, a 1.6% increase in March 1997.

Looking at the evolution of the three-month to three-month growth of the production trend for Japan, a relatively regular evolution of growth rates was seen, around 0.0% during much of 1996 and 1997. After a period of reduced activity between April 1997 and August 1997, production increased in September 1997 by 0.1% (the latest figure available).

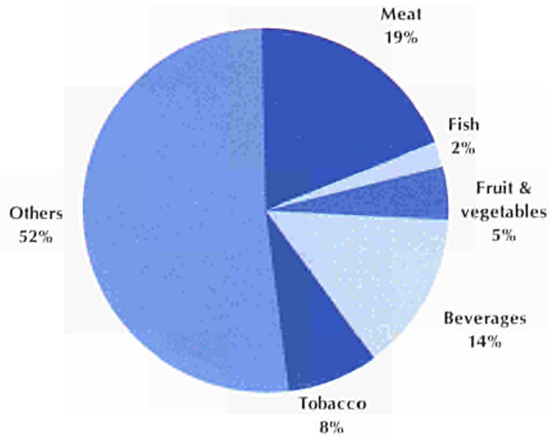
Winter 1996-97 was the best period in the USA for the production trend, with quarterly growth rates of between 0.8% and 1.0%. Production growth has since slowed down, with a constant trend (no growth) during the summer of 1997. At the beginning of the autumn, there was a slight improvement in the trend of production, with a gain of 0.2% percentage points in October 1997.

In January 1998, German producer prices equalled 2.0%

As no data is available for EU-15 as a whole, the observation of the price index in the food, drink and tobacco industry will only be at the Member States level. Between January 1997 and May 1997, German annual changes (one month to the same month of the year before) in producer prices rose from 0.8% to 2.0%. Since this date, prices have remained relatively unchanged, between 1.8% and 2.0%. Latest data for January 1998 saw prices increasing at a rate of 2.0%.

Figure 3.2

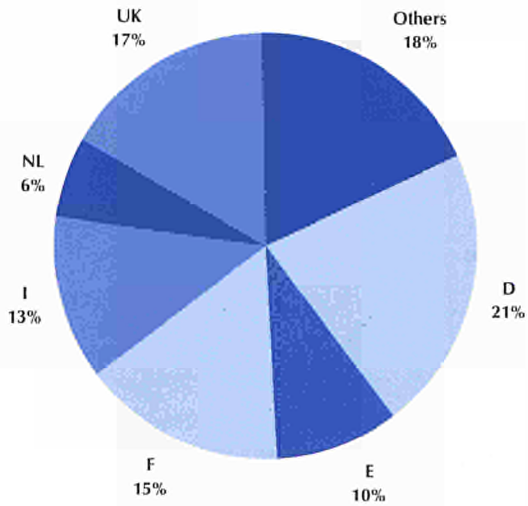
Share of production by industrial group, 1996



Source: eurostat

Figure 3.3

Share of EU-15 value-added at factor cost, 1996



Source: eurostat

Unlike Germany, producer price inflation in Italy has been rather erratic during the last two years. There were very high rates of increase at the beginning of 1996, for instance, the inflation rate amounted to 6.3% in January 1996. The evolution of the price index has since changed and moved to a period of deflation between December 1996 and May 1997, the lowest rate equal to 1.2% in February 1997. Since June, prices in the food, drink and tobacco industry have increased again. The latest data available, in January 1998, showed a 2.5% rise in the producer price index, corresponding to a 0.4 percentage point increase on the month before.

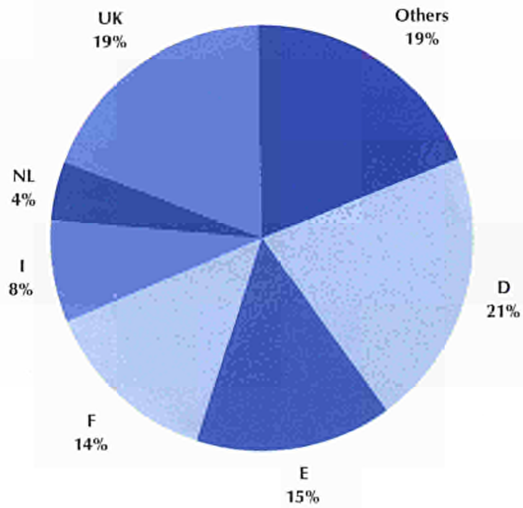
With the exception of a one month period of deflation observed in February 1997, the Spanish price index has grown over the last two years. During the first half of 1997, producer prices were equal to 0.5%, while after a slight decrease in August (0.3%), they accelerated, gaining 0.9 percentage points in September. Since the autumn producer price increases have remained stable, at 0.8% between October 1997 and January 1998.

Since September 1996, Japan has recorded positive growth in producer prices. Rates have been relatively small, i.e. inferior to 1.0% up until March 1997. Between March and April 1997 however, producer prices rose sharply, gaining 1.9 percentage points to 2.4%. Latest data available, for October 1997, showed a decrease in the rate to 1.7%.

American producer prices were growing at a fast pace - up by 12.0% in June 1996. In the autumn of 1996 they fell sharply - down from a rate of increase of 11.4% in August to only 1.8% by December 1996. However, January 1997 also recorded another high rate of increase - monthly gains of 7.2 percentage points. The fluctuating nature of the price index continued, with February data showing an annual rate of change of only 0.4%. Since May 1997, prices have decreased, the latest data available showing a reduction of 3.8% in October 1997.

Figure 3.4

Share of EU-15 number of persons employed, 1996



Source: eurostat

High levels of competition and market concentration

With production in current prices equal to 546 billion ECU in 1996, the European Union was the largest producer in the world of food, beverages and tobacco. The activity accounted for 16.2% of total EU manufacturing production. USA and Japanese production in 1996 for food, beverages and tobacco was 399 billion and 241 billion ECU respectively. The equivalent shares in total manufacturing were 12.7% and 9.3%.

The three major activities in the food, beverages and tobacco industry in the EU in 1996 were: other food products (21% share); production, processing and preserving of meat and meat products (18%) and dairy products (15%). Some activities are very concentrated in a few companies. As with most mature markets, the industry is often characterised by high levels of competition based on brand loyalty and increasing market concentration (witnessed by the wide number of mergers and acquisitions over the last few years). Leading producers have been seen to reduce their profit margins as a result of preserving market share and the increased bargaining power of major distribution chains.

Unilever, B.A.T. Industries and Hanson are some of the most important leading food, drink and tobacco firms. Although Nestlé is largest player in the EU food, drink and tobacco industry it is not ranked as an EU company (Swiss). Nevertheless most of the main European companies are British or Dutch. The United Kingdom in 1996 produced 14.3% of European output. In more fragmented markets the number of small and medium sized producers remained high, with Germany accounting for a 22.5% share of the EU market.

Ireland, Denmark and Greece the most highly specialised countries

Ireland was the most specialised EU country for this activity in 1996. Indeed, the industry covered 33.4% of total manufacturing output. Denmark and Greece are both specialised with respective shares of 31.1% and 28.6%. Whilst in Germany (12.6%) and Sweden (11.2%) lower than average shares were recorded in the total manufacturing.

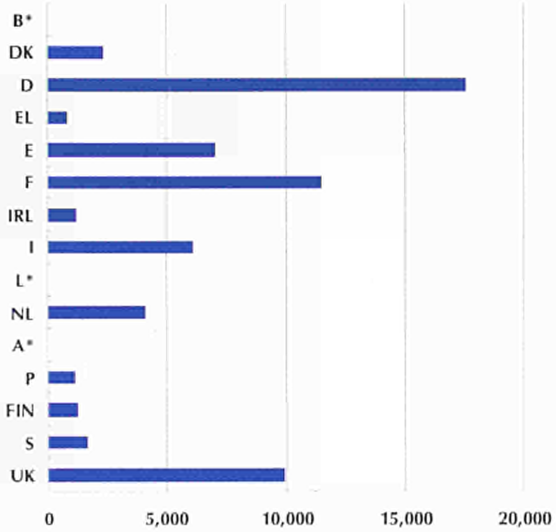


Figure 3.5

Labour costs, 1995 (million ECU)

Source: eurostat

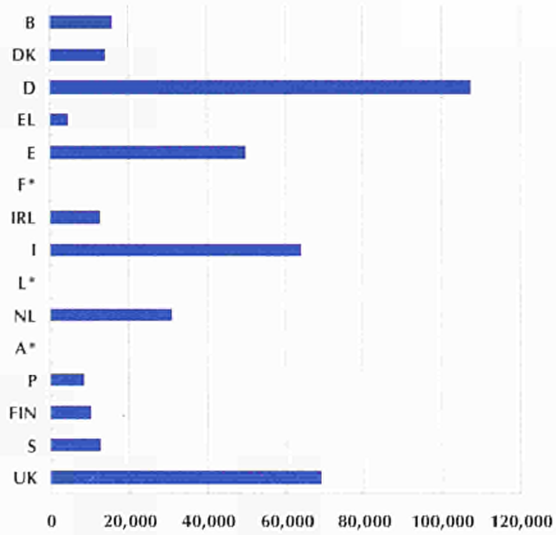


Figure 3.6

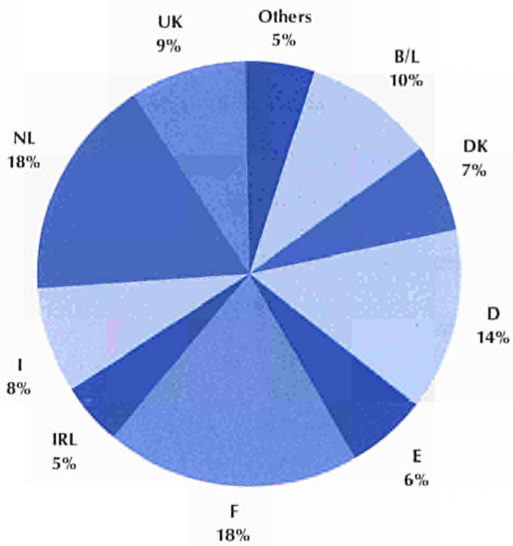
Production in constant prices, 1996 (million ECU)

Source: eurostat

Looking at the other two members of Triad in 1996 the share of the industry in total manufacturing remained below that seen in Europe: 13.7% for the USA and 10.3% for Japan. The share of the food, drink and tobacco industry in total manufacturing has been stable throughout the countries of Triad - which is quite normal for a mature market with a fairly constant demand (when viewed at such an aggregated level). The USA recorded a slight decline from 14.5% in 1990 to 13.7% in 1996. In the meantime, both Japan and Europe recorded slight increases of 0.1 percentage points.

Figure 3.7

Share of European exports to the rest of the world, 1996



Source: eurostat

Little change in food, drink and beverages output

In 1996, EU production in constant prices grew by 0.5% compared to the year before. The annual average growth rate of the last six years for which data was available was 0.2%. Between 1995 and 1996 Sweden and Finland recorded the largest gains in production in real terms: up by 4.9% and 3.8% respectively. Whilst Denmark and Spain both saw their production decline by 2.8%, Italy was down by 2.7%.

A steady decline in employment for the food, drink and tobacco industry

The European Union has experienced a decline of 6.1% (1.0% annual average reduction) of the number of persons employed during the period 1990-96. In 1996, the annual reduction was of the magnitude of 15 thousand persons employed (-0.6%). Two countries recorded sizeable losses: Portugal and Sweden saw their levels of employment decline during the period 1990-96 by 17.5% (-4.2% annual average change) and 13.3% (-3.3%) respectively. Germany had the largest share of the European workforce, with 21.1% of the European total. France accounted for a 19.2% share.

Comparisons with Japan and USA show these two countries accounting for 48% and 58% of European employment levels in 1996. Between 1990 and 1996 Japanese and US employment figures experienced annual average reductions of 0.4% and 0.8% respectively.

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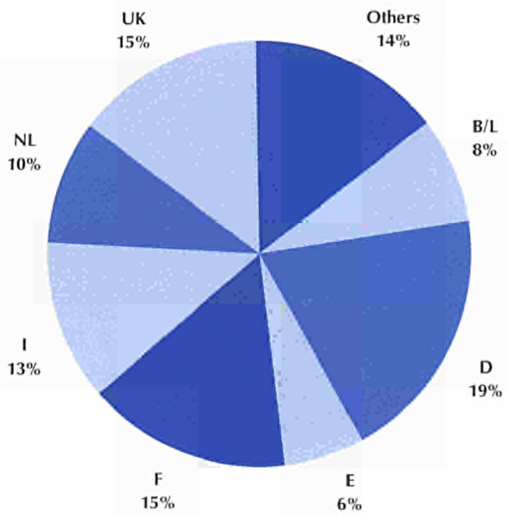
Figure 3.8

Share of European imports from the rest of the world, 1996



Source: eurostat

Other Eurostat products

Enterprises in Europe: fourth report

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 EU-15, employing more than 100 million people.

The publication contains several parts which present the information that has been gathered by Eurostat. Each has been designed to facilitate the rapid acquisition of the facts. The interested reader may turn to detailed country or sectoral information. Besides this information, an update of the whole SME database will be published on CD-Rom in the first half of 1998. Eurostat Data-Shops also have the most recent data and can make user-specific extractions suited to customers' needs.

The paper publication is broken down into the following sections:
Part 1: main information on European enterprises;
Part 2: specific analyses, such as enterprise creation, the innovative behaviour of SMEs or regional analyses;
Parts 3 & 4: sectoral and country analyses.

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.

Enquiries regarding the purchase of data should be directed to:
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L - 2014 Luxembourg

tel: (352) 4335 2251
fax: (352) 4335 22221
e-mail: agnesn@eurostat.datashop.lu

An order form may be found at the back of this publication

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 (%)
EU-15	117,828	4.1	122,464	3.9	124,435	1.6	125,400	0.8	130,431	4.0
B	:	:	:	:	:	:	:	:	:	:
DK	3,406	2.9	3,544	4.0	3,775	6.5	3,779	0.1	3,770	-0.2
D	24,999	3.5	26,047	4.2	26,481	1.7	27,554	4.1	28,100	2.0
EL	811	52.8	900	11.0	957	6.4	1,022	6.7	1,064	4.1
E	13,021	4.1	12,085	-7.2	11,988	-0.8	12,281	2.4	12,546	2.2
F	17,330	4.8	17,875	3.1	18,431	3.1	19,338	4.9	19,785	2.3
IRL	3,714	10.2	3,927	5.7	4,213	7.3	4,491	6.6	4,702	4.7
I	12,912	6.5	16,723	29.5	16,360	-2.2	15,221	-7.0	16,732	9.9
L	:	:	:	:	:	:	:	:	:	:
NL	7,638	6.4	8,082	5.8	8,337	3.2	7,644	-8.3	7,762	1.5
A	:	:	:	:	:	:	:	:	:	:
P	2,575	20.5	2,467	-4.2	2,318	-6.1	2,362	1.9	2,521	6.7
FIN	2,251	-19.0	2,004	-11.0	2,009	0.2	2,052	2.2	2,070	0.9
S	3,008	4.2	2,433	-19.1	2,539	4.4	2,659	4.7	3,061	15.1
UK	20,316	0.2	20,283	-0.2	21,295	5.0	20,765	-2.5	21,899	5.5

Source: eurostat

Table 3.2

Production in constant prices (million ECU)

	1992	t / t-1 (%)	1993	t / t-1 (%)	1994	t / t-1 (%)	1995	t / t-1 (%)	1996	t / t-1 (%)
EU-15	493,960	0.7	488,713	-1.1	491,836	0.6	501,672	2.0	504,374	0.5
B	14,574	2.0	14,335	-1.6	13,943	-2.7	15,289	9.7	15,846	3.6
DK	15,224	6.4	14,796	-2.8	15,387	4.0	14,537	-5.5	14,131	-2.8
D	105,520	-0.8	101,990	-3.3	103,165	1.2	103,600	0.4	107,360	3.6
EL	3,934	-1.5	4,204	6.9	4,366	3.8	4,559	4.4	4,497	-1.4
E	49,596	1.4	49,746	0.3	51,737	4.0	51,566	-0.3	50,128	-2.8
F	:	:	:	:	:	:	:	:	:	:
IRL	11,349	2.5	11,617	2.4	11,827	1.8	12,472	5.5	12,765	2.3
I	63,909	2.8	62,104	-2.8	63,495	2.2	65,708	3.5	63,929	-2.7
L	:	:	:	:	:	:	:	:	:	:
NL	34,892	0.9	34,908	0.0	30,768	-11.9	31,053	0.9	30,832	-0.7
A	:	:	:	:	:	:	:	:	:	:
P	8,013	6.6	8,111	1.2	8,069	-0.5	8,270	2.5	8,398	1.5
FIN	9,778	-4.2	9,968	1.9	9,662	-3.1	9,962	3.1	10,341	3.8
S	10,767	-0.5	11,236	4.4	11,837	5.3	12,187	3.0	12,782	4.9
UK	69,175	-2.5	69,242	0.1	69,254	0.0	69,408	0.2	69,137	-0.4

Source: eurostat

Number of persons employed & labour costs

Table 3.3

Number of persons employed (units)

	1992	t / t-1 (%)	1993	t / t-1 (%)	1994	t / t-1 (%)	1995	t / t-1 (%)	1996	t / t-1 (%)
EU-15	2,802,264	-1.4	2,718,256	-3.0	2,678,346	-1.5	2,647,441	-1.2	2,632,033	-0.6
B	66,643	-3.0	64,511	-3.2	63,091	-2.2	68,247	8.2	69,884	2.4
DK	64,829	-1.2	66,385	2.4	65,741	-1.0	68,521	4.2	:	:
D	620,697	-1.1	588,491	-5.2	574,387	-2.4	561,111	-2.3	554,611	-1.2
EL	48,965	1.1	48,947	0.0	49,324	0.8	48,676	-1.3	:	:
E	379,343	-1.5	379,531	0.0	378,272	-0.3	374,392	-1.0	387,986	3.6
F	368,951	-0.3	360,819	-2.2	362,789	0.5	359,634	-0.9	357,259	-0.7
IRL	46,559	3.2	46,208	-0.8	46,716	1.1	47,922	2.6	49,143	2.5
I	237,027	0.1	233,356	-1.5	226,865	-2.8	221,220	-2.5	215,147	-2.7
L	:	:	:	:	:	:	:	:	:	:
NL	133,775	-1.1	124,187	-7.2	121,553	-2.1	116,502	-4.2	113,167	-2.9
A	:	:	:	:	:	:	:	:	:	:
P	124,772	-1.2	111,338	-10.8	117,652	5.7	107,369	-8.7	102,311	-4.7
FIN	47,756	-7.7	43,851	-8.2	41,638	-5.0	40,610	-2.5	:	:
S	61,273	-6.2	60,090	-1.9	58,056	-3.4	57,863	-0.3	57,372	-0.8
UK	530,681	-2.5	521,360	-1.8	508,013	-2.6	513,904	1.2	506,336	-1.5

Source: eurostat

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 (%)
EU-15	65,804	9.2	68,112	3.5	68,104	0.0	69,025	1.4	69,062	0.1
B	:	:	:	:	:	:	:	:	:	:
DK	1,875	2.9	1,947	3.8	2,009	3.2	2,103	4.7	2,327	10.7
D	15,809	13.1	16,849	6.6	17,401	3.3	17,547	0.8	17,549	0.0
EL	607	4.6	675	11.1	715	6.0	770	7.7	816	6.0
E	7,065	8.4	7,361	4.2	6,940	-5.7	6,867	-1.1	7,040	2.5
F	9,931	4.8	10,568	6.4	10,851	2.7	11,197	3.2	11,482	2.5
IRL	1,004	5.6	1,080	7.7	1,070	-1.0	1,122	4.9	1,155	2.9
I	7,521	11.5	7,615	1.3	6,796	-10.8	6,682	-1.7	6,115	-8.5
L	:	:	:	:	:	:	:	:	:	:
NL	3,485	16.8	3,660	5.0	4,422	20.8	4,414	-0.2	4,050	-8.2
A	:	:	:	:	:	:	:	:	:	:
P	1,042	22.7	1,196	14.8	1,067	-10.8	1,137	6.6	1,106	-2.7
FIN	1,414	-3.4	1,182	-16.4	981	-17.1	1,051	7.1	1,212	15.4
S	1,874	5.4	1,906	1.7	1,573	-17.5	1,595	1.4	1,612	1.0
UK	10,238	9.2	9,988	-2.4	9,841	-1.5	10,157	3.2	9,930	-2.2

Source: eurostat

Table 3.5

Extra-EU-15 exports (million ECU)

	1992	t / t-1 (%)	1993	t / t-1 (%)	1994	t / t-1 (%)	1995	t / t-1 (%)	1996	t / t-1 (%)
EU-15	29,086	7.2	31,822	9.4	34,852	9.5	36,974	6.1	38,952	5.3
B/L	1,243	9.9	1,346	8.3	1,940	44.1	2,187	12.8	2,064	-5.6
DK	2,169	-4.2	2,550	17.6	3,036	19.0	2,992	-1.5	3,105	3.8
D	3,911	-0.2	4,530	15.8	5,151	13.7	5,499	6.8	5,539	0.7
EL	412	33.7	433	5.2	479	10.5	504	5.3	631	25.1
E	1,981	9.0	2,153	8.7	2,411	12.0	2,711	12.5	2,755	1.6
F	6,207	5.5	6,467	4.2	7,039	8.8	7,302	3.7	8,129	11.3
IRL	1,165	19.4	1,209	3.7	1,359	12.5	1,593	17.2	1,572	-1.3
I	2,805	18.3	2,795	-0.3	2,954	5.7	3,329	12.7	3,832	15.1
NL	3,741	14.8	4,522	20.9	4,663	3.1	5,224	12.0	4,986	-4.6
A	440	3.1	481	9.2	618	28.6	638	3.2	678	6.3
P	340	14.9	273	-19.6	304	11.2	373	22.7	422	13.2
FIN	244	3.7	341	40.2	447	31.0	395	-11.6	539	36.5
S	335	-10.3	417	24.5	630	51.1	546	-13.4	610	11.8
UK	4,118	5.6	4,380	6.4	3,883	-11.3	3,727	-4.0	4,170	11.9

Source: eurostat

Table 3.6

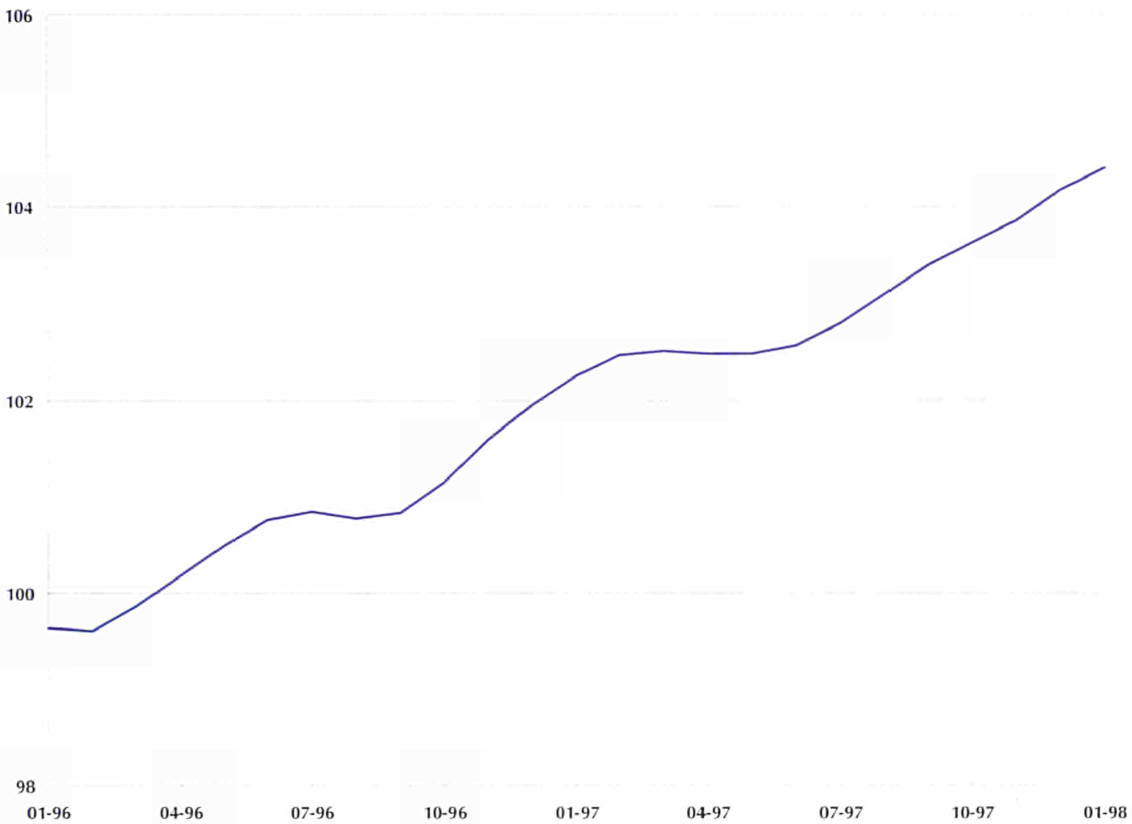
Extra EU-15 imports (million ECU)

	1992	t / t-1 (%)	1993	t / t-1 (%)	1994	t / t-1 (%)	1995	t / t-1 (%)	1996	t / t-1 (%)
EU-15	25,391	2.0	25,253	-0.5	28,395	12.4	27,456	-3.3	29,690	8.1
B/L	961	-3.6	1,057	10.0	1,350	27.7	1,461	8.2	1,511	3.4
DK	1,171	4.5	1,162	-0.8	1,365	17.5	1,314	-3.7	1,436	9.3
D	5,021	3.5	4,791	-4.6	5,184	8.2	5,126	-1.1	5,371	4.8
EL	250	2.7	212	-15.3	228	7.6	241	6.1	343	42.2
E	2,600	5.5	2,718	4.5	2,867	5.5	2,659	-7.3	2,781	4.6
F	3,463	-3.2	3,388	-2.2	3,438	1.5	3,388	-1.4	3,608	6.5
IRL	204	7.6	234	14.7	279	19.0	254	-8.8	252	-0.8
I	2,562	-10.2	2,469	-3.6	2,900	17.4	2,945	1.6	3,051	3.6
NL	2,746	18.2	2,630	-4.2	3,441	30.9	3,514	2.1	4,014	14.2
A	477	-0.8	498	4.4	598	20.1	336	-43.9	381	13.6
P	744	4.2	682	-8.3	699	2.5	681	-2.5	737	8.1
FIN	251	4.2	255	1.8	343	34.2	182	-46.8	248	36.1
S	791	4.4	753	-4.7	1,010	34.0	602	-40.4	664	10.4
UK	4,151	1.8	4,404	6.1	4,696	6.6	4,753	1.2	5,293	11.4

Source: eurostat

Production (trend cycle) & producer price indices

Figure 3.9



EU-15 production index (1995 = 100)

Source: eurostat

Table 3.7

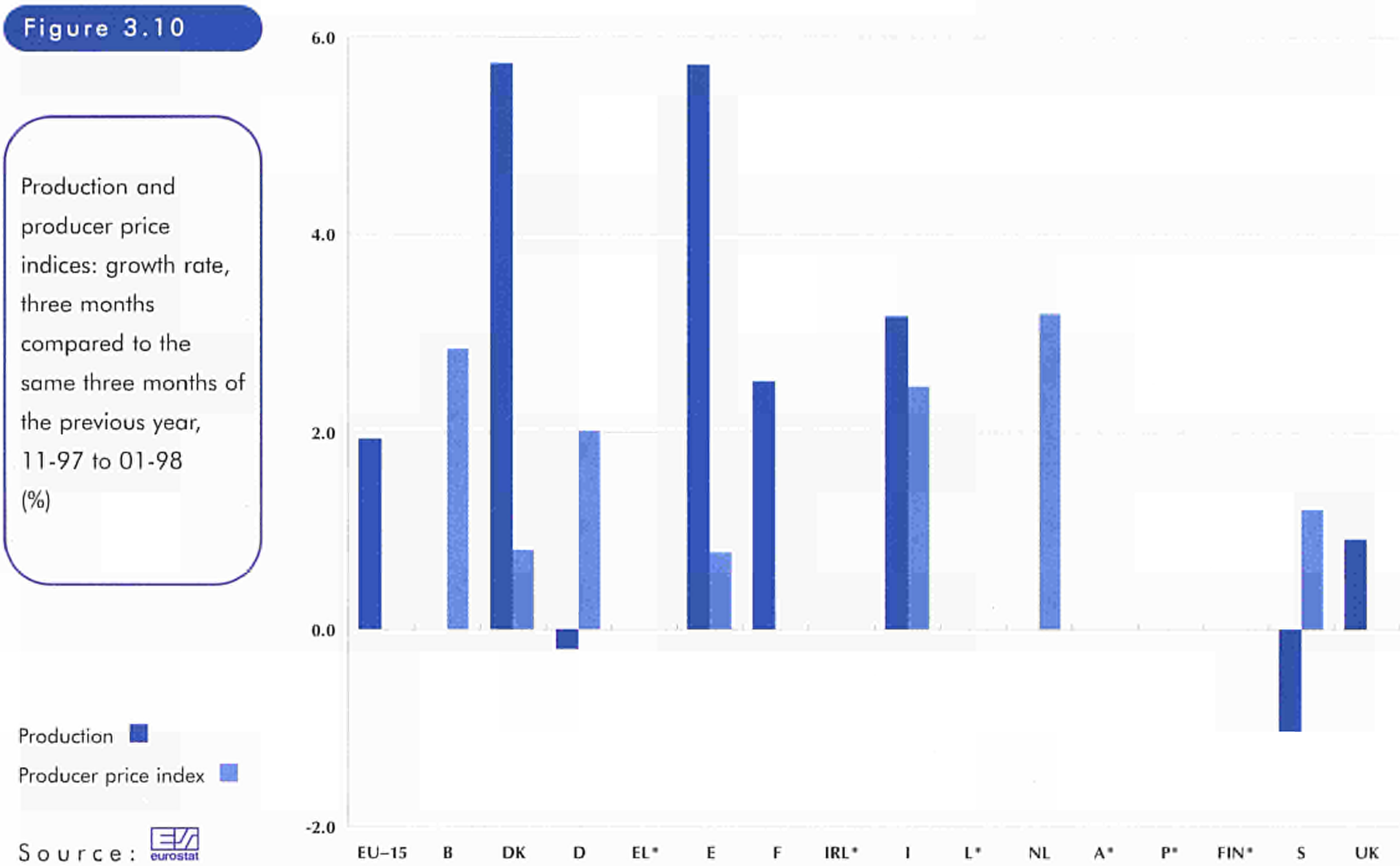
Production and producer price indices: growth rates (%)

	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
EU-15	11-97	⇨	01-98	0.7	1.9		:	:
B	10-97	⇨	12-97	1.0	2.0	01-98	-1.2	2.8
DK	11-97	⇨	01-98	1.1	5.7	01-98	-5.7	0.8
D	11-97	⇨	01-98	0.5	-0.2	01-98	0.1	2.0
EL	10-97	⇨	12-97	0.5	-1.3	12-97	-0.5	0.3
E	11-97	⇨	01-98	1.3	5.7	01-98	-0.4	0.8
F	11-97	⇨	01-98	0.6	2.5	03-97	-0.1	1.2
IRL	08-97	⇨	10-97	0.4	2.7	09-97	-0.7	-1.3
I	11-97	⇨	01-98	0.6	3.2	01-98	0.2	2.5
L	10-97	⇨	12-97	2.4	6.2		:	:
NL	06-97	⇨	08-97	0.3	1.9	02-98	-0.5	2.6
A	09-97	⇨	11-97	7.5	1.5		:	:
P	10-97	⇨	12-97	0.7	1.6	12-97	-1.0	1.0
FIN	07-94	⇨	09-94	-0.6	:	12-97	0.0	2.6
S	11-97	⇨	01-98	0.3	-1.0	02-98	-1.5	0.6
UK	11-97	⇨	01-98	0.1	0.9		:	:
Japan	07-97	⇨	09-97	0.1	0.3	10-97	-0.4	1.7
USA	08-97	⇨	10-97	0.2	1.8	10-97	-0.7	-3.8

Source: eurostat

Figure 3.10

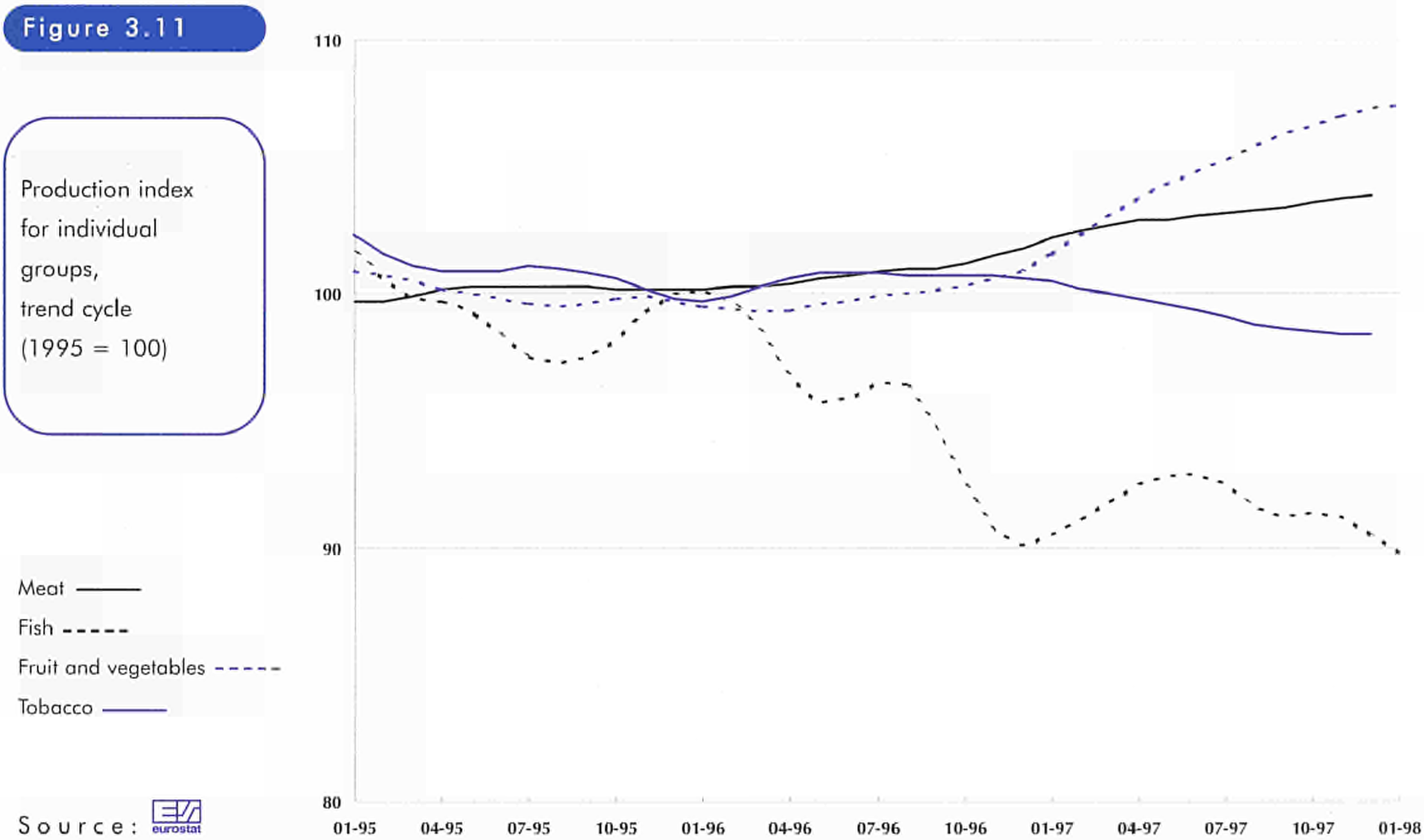
Production and producer price indices: growth rate, three months compared to the same three months of the previous year, 11-97 to 01-98 (%)



Source: eurostat

Figure 3.11

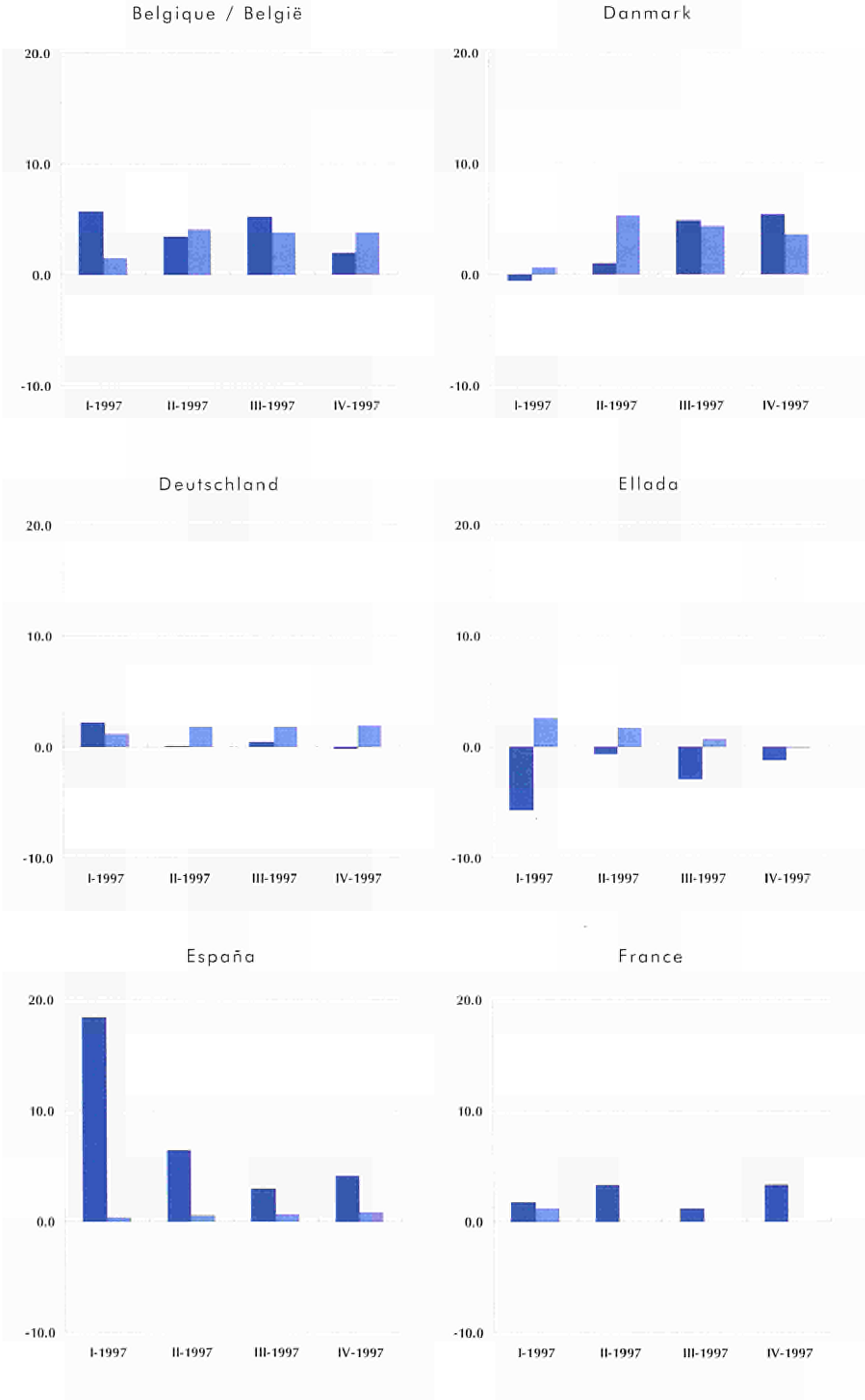
Production index for individual groups, trend cycle (1995 = 100)



Source: eurostat

Figure 3.12

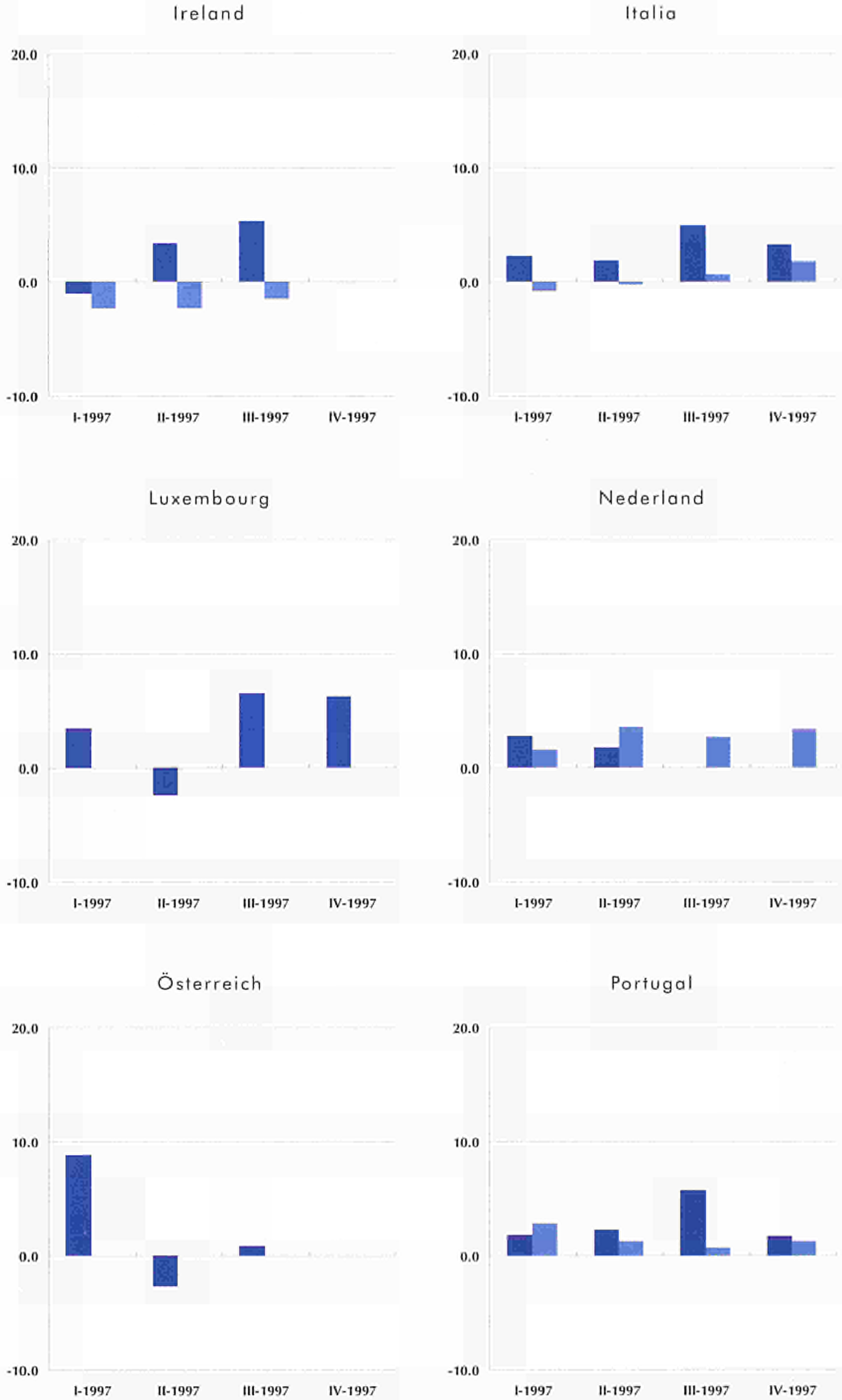
Production and producer price indices: growth rate, three months compared to the same three months of the previous year (%)



Source: eurostat

Figure 3.12

Production and producer price indices: growth rate, three months compared to the same three months of the previous year (%)



Production index

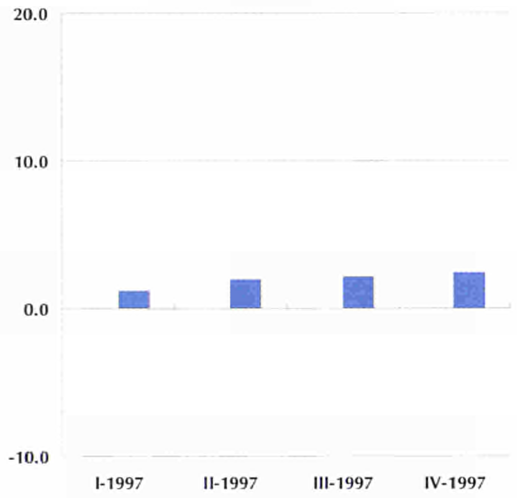
Producer price index

Source: eurostat

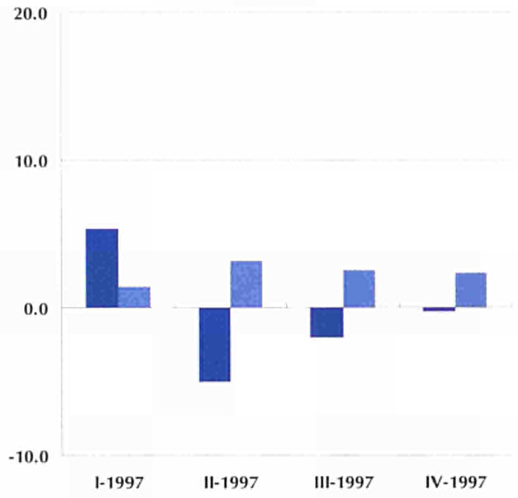
Figure 3.12

Production and producer price indices: growth rate, three months compared to the same three months of the previous year (%)

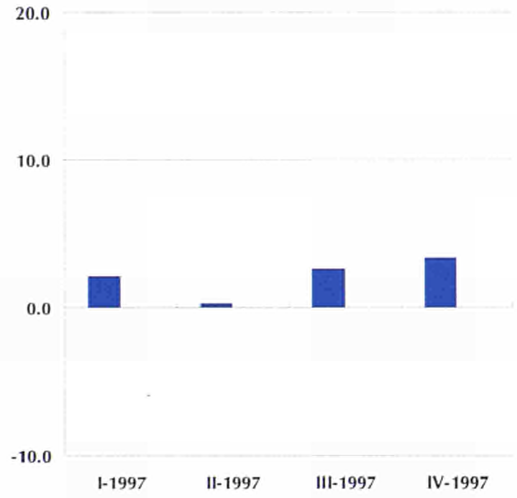
Suomi / Finland



Sverige



United Kingdom



Production index

Producer price index

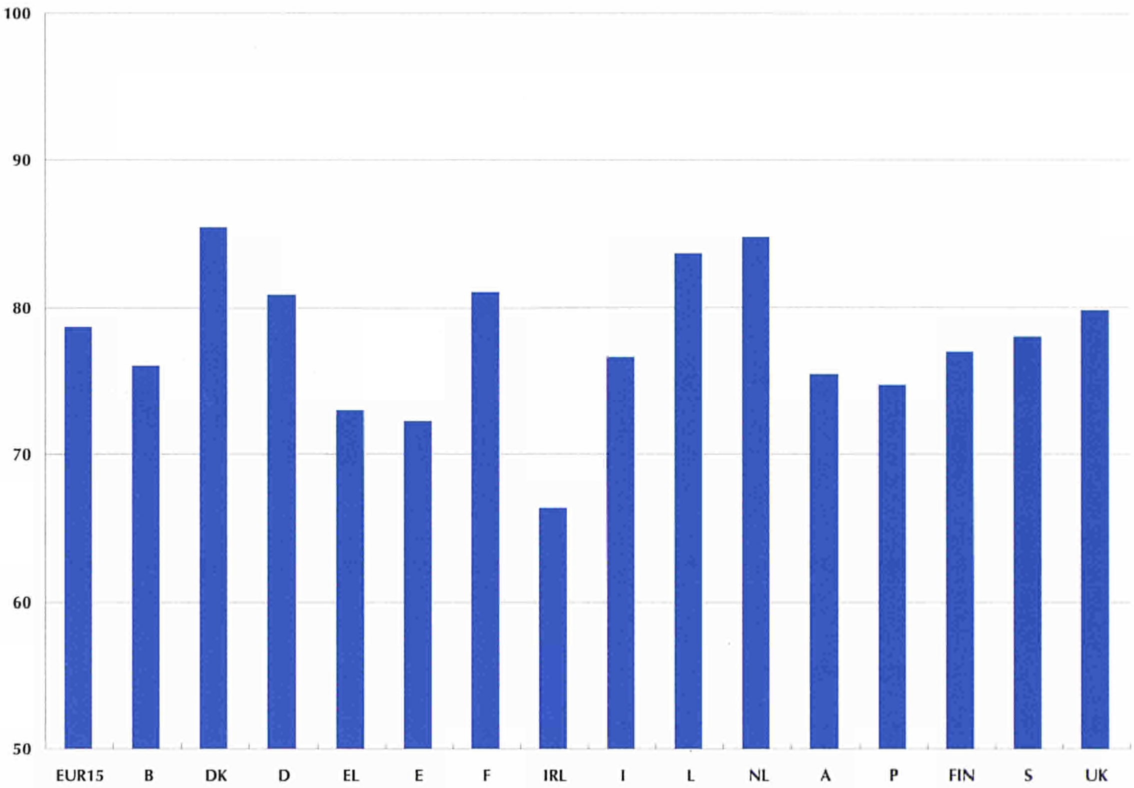
Further information - the production and producer price indices:

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 and Spain). Secondly, for EU-15 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.
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 73.

Source: eurostat

Figure 3.13

Capacity utilisation rates, 01-98 (%)



Source: DG II, Business Survey

Table 3.8

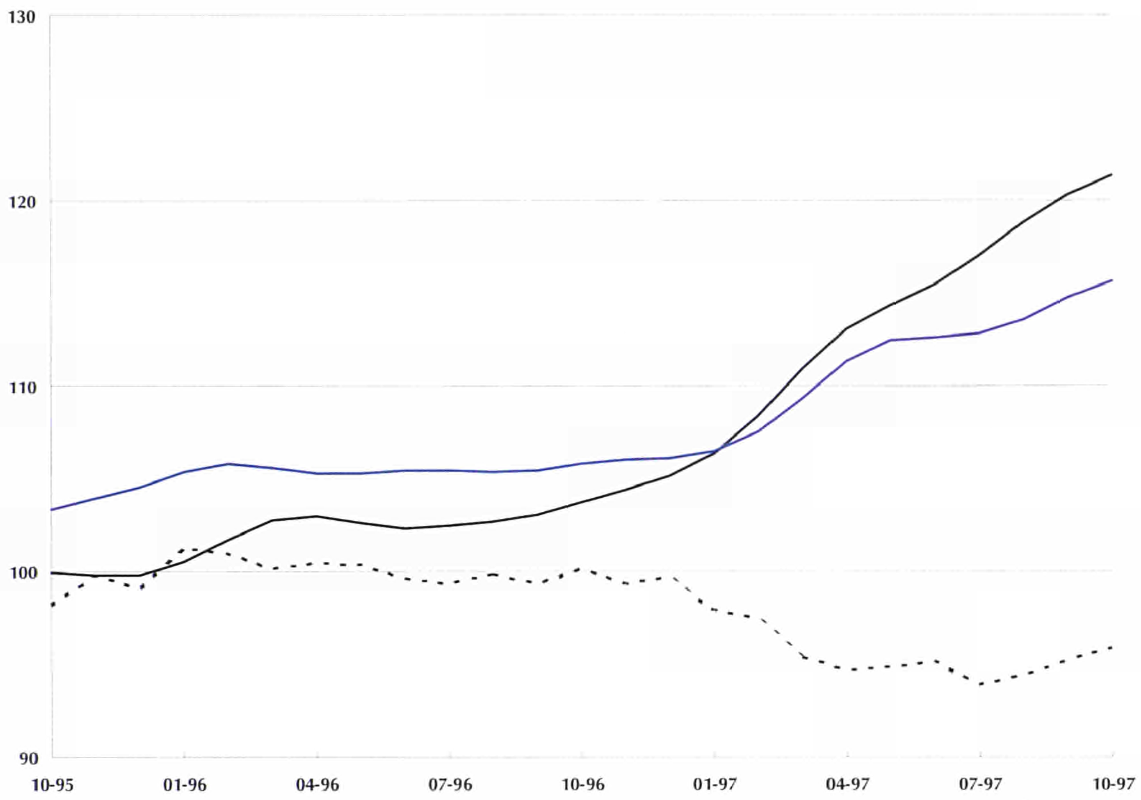
Capacity utilisation rates (%)

	Growth rate: latest month, t / t-12 (%)	04-97	07-97	10-97	01-98
EU–15	1.2	78.4	78.8	80.5	78.7
B	-1.0	75.0	77.9	78.1	76.0
DK	5.4	82.0	83.0	83.0	85.4
D	-0.2	81.2	82.8	82.5	80.8
EL	0.1	67.1	72.0	72.8	73.0
E	12.8	66.8	70.9	71.7	72.3
F	-2.2	81.3	81.2	82.2	81.0
IRL	-5.9	72.0	61.1	69.2	66.4
I	3.2	73.2	73.5	77.9	76.6
L	2.8	82.4	82.1	83.1	83.6
NL	-1.7	85.0	85.1	85.2	84.8
A	-0.1	72.5	74.1	75.1	75.5
P	-3.1	73.7	76.9	77.0	74.7
FIN	5.6	77.7	75.0	75.0	77.0
S	-2.5	79.0	81.0	:	78.0
UK	0.5	83.8	81.8	82.7	79.8

Source: DG II, Business Survey

Foreign trade indices (trend cycle)

Figure 3.14



EU-15 foreign trade indices in ECU terms (1995 = 100)

Export value index
Import value index
Terms of trade

Source: eurostat

Table 3.9

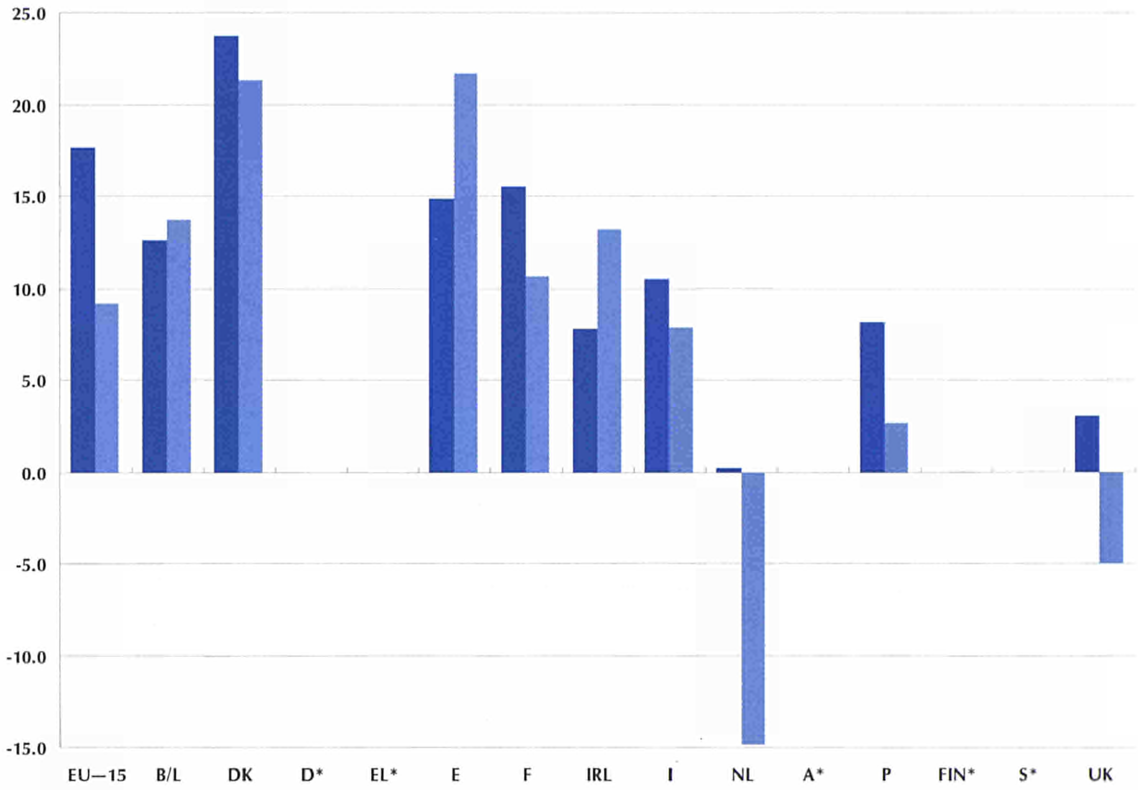
Foreign trade indices (value indices are in ECU terms): growth rate, three months compared to the previous three months (%)

	Latest 3 months available			Exports Value	Exports Volume	Imports Value	Imports Volume	Terms of trade
EU-15	08-97	⇨	10-97	3.9	1.9	1.8	-0.7	0.6
B / L	09-97	⇨	11-97	0.7	-0.2	1.4	-0.7	-1.2
DK	09-97	⇨	11-97	-1.2	-2.8	5.8	1.0	-1.7
D	07-97	⇨	09-97	2.6	2.2	3.6	2.3	0.2
EL	07-97	⇨	09-97	-6.3	-10.5	1.2	-3.1	1.0
E	09-97	⇨	11-97	1.5	1.1	0.7	-1.1	1.8
F	09-97	⇨	11-97	1.6	0.7	2.3	:	0.4
IRL	08-97	⇨	10-97	4.8	3.3	1.6	1.8	-1.8
I	08-97	⇨	10-97	3.0	1.9	1.9	2.2	-1.4
NL	08-97	⇨	10-97	12.3	-0.9	-1.9	-3.9	-0.3
A		⇨		:	:	:	:	:
P	08-97	⇨	10-97	2.8	1.1	-0.2	0.0	1.3
FIN		⇨		:	:	:	:	:
S		⇨		:	:	:	:	:
UK	09-97	⇨	11-97	-1.2	-1.0	1.2	-0.8	0.6

Source: eurostat

Figure 3.15

Foreign trade indices in ECU terms: growth rate, three months compared to the same three months of the previous year, 08-97 to 10-97 (%)



Source: eurostat

Table 3.10

Foreign trade indices (value indices are in ECU terms): growth rates (%)

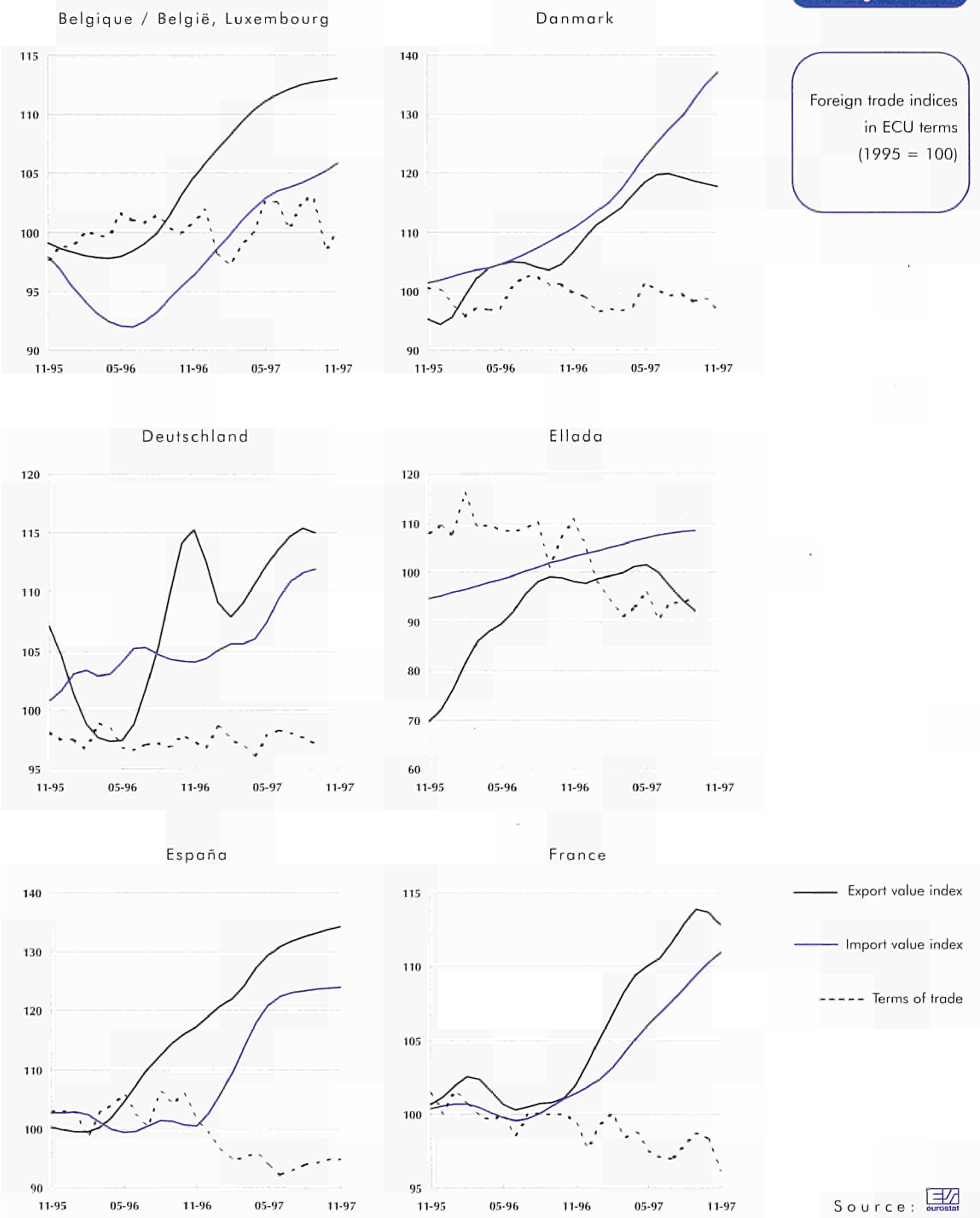
	Latest 3 months available			Exports Value	Exports Volume	Imports Value	Imports Volume	Terms of trade
EU–15	08-97	⇨	10-97	17.7	12.4	9.1	-0.5	-4.6
B / L	09-97	⇨	11-97	5.8	-1.1	6.3	-0.5	0.2
DK	09-97	⇨	11-97	18.3	12.9	27.3	18.2	-2.8
D	07-97	⇨	09-97	10.2	5.5	5.8	1.8	0.6
EL	07-97	⇨	09-97	-19.7	-20.3	8.7	-4.6	-11.8
E	09-97	⇨	11-97	14.3	17.2	24.1	15.8	-8.9
F	09-97	⇨	11-97	14.1	10.7	8.9	3.6	-2.1
IRL	08-97	⇨	10-97	7.8	8.3	13.2	9.6	-3.6
I	08-97	⇨	10-97	10.5	13.1	7.9	8.2	-2.0
NL	08-97	⇨	10-97	0.2	-5.4	-14.9	-21.5	-2.5
A		⇨		:	:	:	:	:
P	08-97	⇨	10-97	8.2	4.5	2.6	-1.0	-0.8
FIN		⇨		:	:	:	:	:
S		⇨		:	:	:	:	:
UK	09-97	⇨	11-97	2.9	10.8	-0.8	4.1	-2.5

Source: eurostat

Foreign trade indices (trend cycle)

Figure 3.16

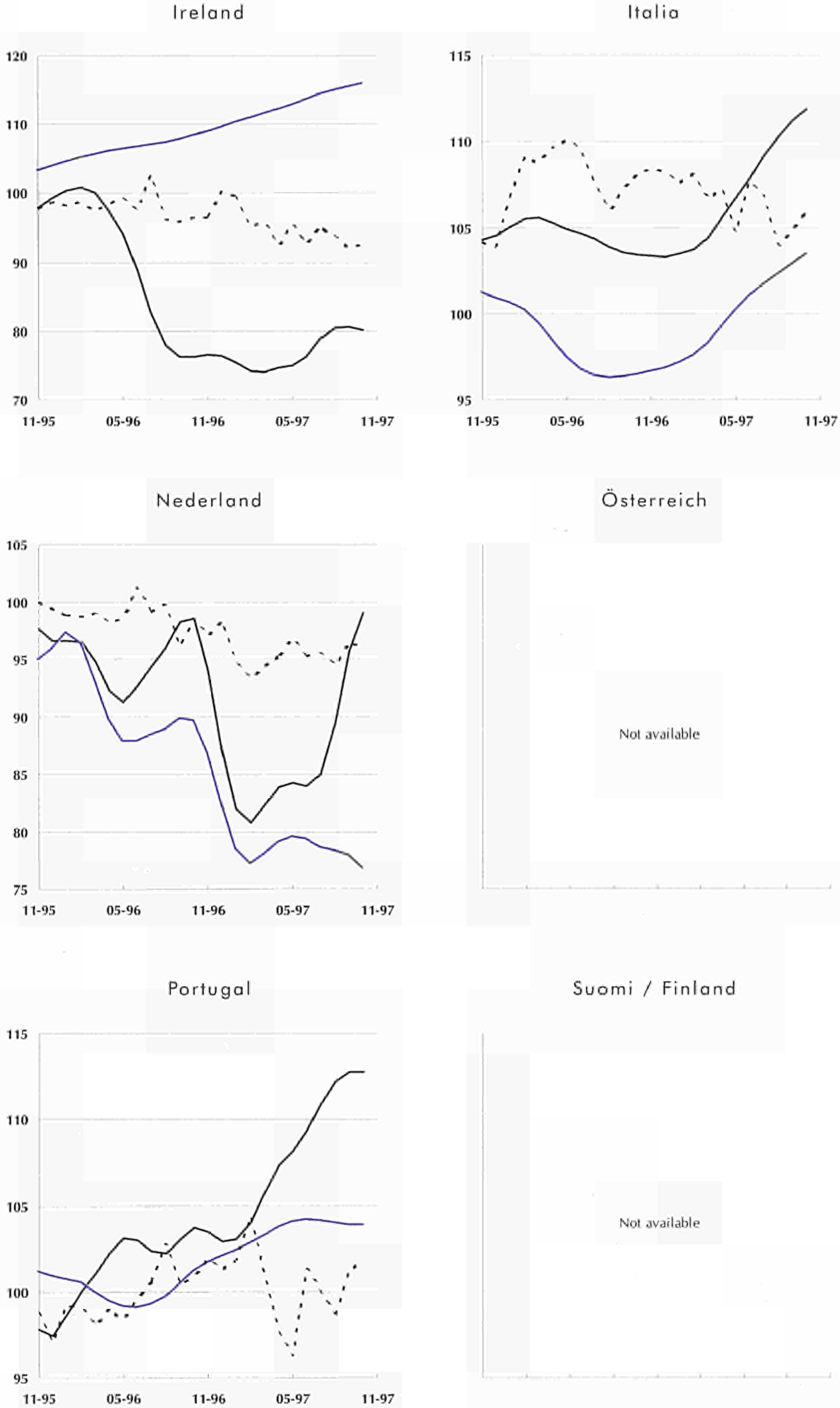
Foreign trade indices in ECU terms (1995 = 100)



Source: eurostat

Figure 3.16

Foreign trade indices in ECU terms (1995 = 100)



Export value index

Import value index

Terms of trade

Source: eurostat

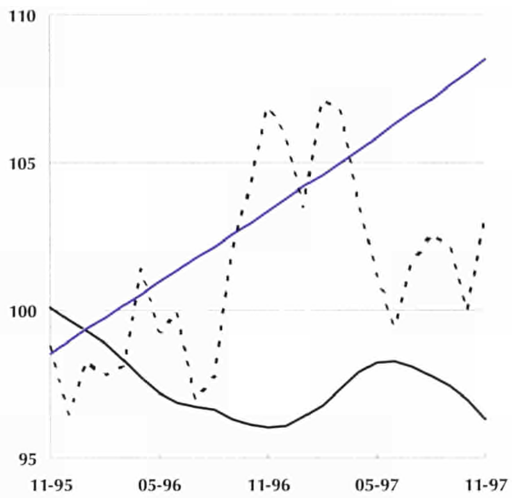
Figure 3.16

Foreign trade indices in ECU terms (1995 = 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 EU-15 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 73.

Source: eurostat

4. Data diskette

The files on the diskette are broken down by industrial branch. 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 <F5> 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.

7. Furthermore, there are two files called STRUCT1.EXE (English number format) and STRUCT2.EXE (continental European number format) with the structural data, for the industry covered in section 3 of the publication. It is also detailed in the README.TXT file.

If you would like to receive the data by e-mail as soon as it is extracted, please send a message to Raffaella Turci (raffaella.turci@eurostat.cec.be) requesting the data.

Divisions:

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

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. Data have been based on 1995 = 100, using weights from the annual surveys of 1995.

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 sub-contractors to Eurostat;

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

Every effort has been made to include data for the EU-15 Member States. The indices from 1991 onwards are on a post-unification basis and include East-Germany.

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.

Sometimes statistics are collected at the product level. This may be the case for prices, production, imports and exports. Thus, data is not strictly speaking following an activity classification (NACE Rev.1) but a product classification (Classification of Products by Activity "CPA"). CPA, was laid down in a Council Regulation in 1993. It is a six digit classification which for the 2-digit, 3-digit and 4-digit level is identical to NACE Rev.1 in its coding.

For the indices of imports and exports, external trade data of 9,000 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.

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. 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 three 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. The third is a year on year growth rate for a particular month - here gross data for prices is used. Estimates are sometimes made to create a EU-15 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.

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 sub-contractors to Eurostat. Thus, EU-15 totals often contain estimates for missing countries. Estimates are shown in bold. Attention should be drawn to the fact that the data has switched to the NACE Rev.1 classification, this may result in revisions of data being made in the medium-term.

Annual foreign trade data comes from the COMEXT database. Statistical régime 4 (total trade) is used.

Signs and abbreviations

B / L	Belgo-Luxembourg Economic Union
ECU	European currency unit
TRIAD	EU-15, Japan and the USA
Billion	thousand million
*	not available (in graphs)
:	not available (in tables)
**	estimation (in graphs)
data in bold	estimation (in tables)
1995 = 100	reference year

For more information on methodology, please contact Berthold Feldmann - tel: (352) 4301 34401 or e-mail: berthold.feldmann@eurostat.cec.be.

6. The beer industry in the EU

6. The beer industry in the EU

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Introduction

The European beer industry is mature and has seen little expansion in recent years. Demand has stagnated despite the efforts of manufacturers to increase consumption through marketing strategies (brand loyalty developments), new types of packaging (bottled beers, cans) and new product lines (red beer, non-alcoholic beer, alcopops). EU-15 production in 1996 was equal to 314.1 million hl, down slightly on the figure for 1995 (318.9 million hl). Despite minor fluctuations from 1991 onwards - the EU has seen output remain almost unchanged over the last six years for which data are available. The rate of change observed between 1991 and 1996 was equal to -0.6%. Before 1990, however there was a marked expansion in EU output, with production rising from 250 million hl in 1980 to 305.6 million hl by 1990.

Germany is by far the largest producer within the European Union, with a production volume equal to 114.2 million hl. Germany accounted for a 36.4% share of European output. This share was consistent with the German share of EU production back in 1991 (which was 37.3%). Of the other Member States, the United Kingdom (18.6%) had the second highest share of EU-15 production - followed by Spain (7.9%), the Netherlands (7.5%) and then France (6.5%).

Growth rates for the Member States observed over the period 1991 to 1996 showed that seven of the fifteen Member States experienced growth in production over the period. The largest growth rates were recorded in the Netherlands and Ireland, where growth over the period was equal to 15.3% and 17.6% respectively. On the other hand, reductions in national production of the magnitude of 18% in Luxembourg and 7% in Spain were recorded during the six year period (again 1991-1996).

Turning to consumption in the EU, there has also been little change in the figures during the nineties. Indeed, in 1991 EU-15 consumption was equal to 306 million hl, which declined to 294.7 million hl by 1996 (a reduction of 3.8% over the six years). In almost every country of the European Union did consumption stagnate or decline. There were only four Member States that showed increased consumption between 1991 and 1996. Of these, two recorded very modest gains: they were

Beer consumption has

stagnated over the last decade

France (1.1%) and Greece (2.6%). The other two countries recorded somewhat greater levels of growth over the same period - Ireland (19.8%) and Italy (5.7%). The two largest producers of beer in the EU both saw their national consumption fall, Germany (-5.3%) and the United Kingdom (-4.6%), again rates of change measured over the six year period, 1991-1996.

Consumption per capita

When looking at consumption it is of interest to break down the figures by the respective populations and to study the evolution of beer consumption per head of population. There are naturally large differences in the data by country when looking at this indicator - due to national preferences within the beverages industry. As one would expect, France and Italy both display low levels of beer consumption per capita due to consumer preference for domestic wine production or alternative beverages (either alcoholic or non-alcoholic). Indeed, France (39.6 litres per head), Greece (39.0 litres per head) and Italy (24.0 litres per head) were the three countries which had by far the lowest consumption of beer.

EU-15 consumption per capita declined from 82.4 litres per head to 78.9 litres per head over the period 1991-1995. There were a number of countries with consumption per head above the European Union average in 1996. They were Belgium and Luxembourg (100.4 litres per head), Denmark

Table 6.1

Total beer production (1,000 hl)

	1990	1991	1992	1993	1994	1995	1996
EU-15	305,629	315,946	318,355	310,907	319,144	318,909	314,142
B	14,141	13,799	14,259	14,182	14,743	15,046	14,180
DK	8,922	9,672	9,775	9,435	9,410	10,058	9,591
D	104,281	117,993	120,158	115,800	118,200	117,400	114,227
EL	4,100	3,670	3,900	3,900	4,250	4,005	3,945
E	27,314	26,447	26,082	24,278	25,024	25,313	24,716
F	21,398	20,991	21,296	20,833	20,445	20,634	20,441
IRL	6,366	6,395	6,680	6,910	7,186	7,402	7,765
I	11,067	10,699	10,923	11,715	12,098	11,990	11,117
L	600	572	569	558	531	518	484
NL	20,047	19,893	20,659	20,431	22,175	23,118	23,494
A	9,593	10,184	10,014	9,823	10,144	9,662	9,547
P	7,042	6,933	6,874	6,568	6,637	6,928	6,713
FIN	4,255	4,408	4,576	4,588	4,538	4,726	4,669
S (1)	4,720	4,738	4,973	5,140	5,430	5,309	4,805
UK	61,783	59,552	57,617	56,746	58,333	56,800	58,448
N	2,236	2,256	2,186	2,146	2,202	2,256	2,274
CH	4,227	4,236	4,128	3,907	3,891	3,763	3,627

1) from 1993, excluding exports

Source: CBMC

Table 6.2

Total beer consumption (1,000 hl)

	1990	1991	1992	1993	1994	1995	1996
EU-15	286,916	306,009	307,834	298,582	304,278	300,915	294,716
B / L	12,476	11,556	11,706	11,273	11,127	10,916	10,633
DK	6,537	6,490	6,630	6,541	6,619	6,505	6,363
D	90,267	113,871	115,924	112,000	113,600	112,400	107,800
EL	4,230	3,787	4,130	4,130	4,200	4,005	3,885
E	28,282	27,587	27,572	25,580	26,739	26,963	26,199
F	23,351	22,880	23,022	22,585	22,686	22,690	23,133
IRL	4,341	4,335	4,410	4,364	4,832	4,932	5,193
I	13,286	13,010	13,524	14,324	15,010	14,530	13,758
NL	13,449	13,639	13,692	13,019	13,231	13,265	12,991
A	9,361	9,661	9,673	9,326	9,364	9,309	9,185
P	6,840	6,635	6,646	6,347	6,162	6,416	6,136
FIN	4,196	4,276	4,457	4,379	4,247	4,153	4,074
S	5,116	5,244	5,475	5,537	5,886	5,702	5,228
UK	65,184	63,038	60,973	59,177	60,575	59,129	60,141
N	2,218	2,240	2,172	2,137	2,187	2,284	2,299
CH	4,774	4,845	4,789	4,568	4,550	4,431	4,305

Source: CBMC

Table 6.3

Consumption of beer per capita (litres)

	1990	1991	1992	1993	1994	1995	1996
EU-15	80.7	82.4	82.9	80.1	81.7	80.6	78.9
B / L	120.8	111.9	112.8	107.4	105.6	103.5	100.4
DK	127.2	125.9	128.2	126.0	126.7	124.4	120.9
D	142.8	142.7	144.2	138.0	139.6	137.7	131.7
EL	41.0	36.7	42.0	42.0	42.0	40.0	39.0
E	71.9	71.0	70.5	67.0	66.5	66.6	64.7
F	41.5	40.5	40.9	39.2	39.3	39.1	39.6
IRL	123.9	123.0	124.0	123.0	112.6	112.7	118.0
I	23.0	22.5	23.8	25.1	26.2	25.4	24.0
NL	90.0	90.5	90.2	85.2	86.0	85.8	83.7
A	121.3	123.7	122.6	116.7	116.6	115.7	114.0
P	69.3	67.3	65.3	64.4	62.3	64.7	61.9
FIN	84.2	85.3	88.4	86.4	82.9	80.2	79.5
S	59.8	60.0	63.5	63.7	67.3	64.7	59.1
UK	113.2	109.0	105.1	101.7	103.7	100.9	102.3
N	52.3	52.8	50.8	50.0	50.5	52.5	52.6
CH	70.7	71.0	69.4	65.5	64.8	62.7	60.6

Source: CBMC

Consumption per capita ranged between 24.0 litres per head in Italy and 131.7 litres in Germany

(120.9 litres), Germany (131.7 litres, - the highest per capita figure), the Netherlands (83.7 litres), Finland (79.5 litres) and the United Kingdom (102.3 litres).

Nevertheless, there have been marked changes in consumption patterns in the Member States over the last few years. When looking at consumption per head there were only two countries that saw their consumption per head rise: they were Greece and Italy - the two countries with the lowest per capita consumption figures in the European Union. Greek consumption per capita rose from 36.7 litres in 1991 to 39.0 litres per head by 1996. Italian consumption per capita rose from 22.5 litres in 1991 to 24.0 litres by 1996.

The largest reductions per capita witnessed in the EU since 1991 were seen in Belgium and Luxembourg and Germany - where decreases of over ten litres per head were recorded during the period 1991 to 1996. Nevertheless, in per capita terms the highest consumption figure was still recorded in Germany. Belgian consumption per capita fell from almost 112 litres per capita to just over 100 litres.

Looking further back in time to the start of the eighties, there were large-scale gains observed in the data for some countries. Portugal, Finland and Sweden all experienced substantial increases in consumption per capita during the eighties: for example, Portugal saw consumption rise from a level of only 35 litres per head in 1980 to 69.3 litres in 1990. In Sweden, the increase in consumption was from 47.4 to 59.8 litres per head over the same period.

Table 6.4

Estimated share of total beer sales consumed in private homes (%)

	1990	1991	1992	1993	1994	1995	1996
B/L	31	34	34	35	36	36	37
DK	74	74	73	75	75	75	75
D	60	70	70	65	65	65	65
EL	:	:	30	30	30	35	35
E	25	27	32	26	30	32	32
F	65	:	63	:	:	:	:
IRL	:	8	10	10	10	11	:
I	:	:	:	:	:	58	59
NL	:	62	64	63	63	63	63
A	60	60	60	:	:	63	63
P	:	22	30	30	35	35	35
FIN	70	69	69	68	68	69	70
S	88	87	80	79	79	79	80
UK	20	21	23	24	26	27	27
N	74	70	70	70	70	70	70
CH	46	47	47	47	48	49	51

Source: CBMC

Table 6.5

Comparison of excise duty on 1 hl of beer and total revenue from beer excise duty and VAT, 1996 (ECU)

	At average strength	At 12.5° Plato	Total excise duty (1,000 ECU)	Total VAT (1) (1,000 ECU)
EU-15 (2)	:	:	7,129,317	8,222,796
B	21.07	21.07	188,664	662,821
DK	46.98	46.98	225,197	405,566
D	:	9.68	931,638	:
EL	15.84	15.69	57,602	33,383
E	8.45	8.45	202,180	1,122,446
F	13.09	13.09	206,000	1,200,000
IRL	78.90	98.62	436,323	321,130
I	15.29	17.29	251,140	235,615
L	5.18	5.73	2,685	:
NL	21.92	21.92	267,791	255,172
A	17.86	17.86	148,647	349,846
P	14.41	14.41	90,000	136,000
FIN	131.26	151.68	531,899	308,845
S	76.63	85.15	387,282	381,692
UK	53.18	70.47	3,202,269	2,810,280
N	168.61	239.61	347,706	236,684
CH	16.31	16.31	44,378	21,327

1) estimate
2) excluding Germany and Luxembourg for total VAT

Source: CBMC

Tax excise in the Member States

There are widespread differences in the tax régimes of the Member States across the European Union as regards excise duty on beer. Most countries adopt a policy of consistent excise duty in relation to the strength of alcoholic content of beer. However, a few countries increase the excise in line with the alcoholic content of the beer - namely Ireland, Italy, Luxembourg, Finland, Sweden and the United Kingdom. However, in Greece the contrary policy may be observed - whereby the stronger the beer the less the excise duty that has to be paid.

Excise duty on 1 hl of beer varied enormously between the Member States from 5.18 ECU in Luxembourg to 131.3 ECU in Finland during 1996. A number of countries have excise below 20 ECU/hl: namely, Spain, France, Greece, Italy, Austria and Portugal. Only four countries had excise of over 50 ECU/hl in 1996: they were the United Kingdom (53.2 ECU/hl), Sweden (76.6 ECU/hl), Ireland (78.9 ECU/hl) and Finland.

Total revenue from excise also varies considerably between the countries of the EU. In the United Kingdom 3.2 billion ECU of excise duty was raised in 1996. This may be compared with the other large Member States where lower levels of total excise were recorded: for example, France (206 million ECU), Italy (251 million ECU) and Germany (931 million ECU).

Nevertheless, excise duty should not be seen as the sole reason for price differentials between countries. For example, beer in a café in France is more expensive than in the United Kingdom (despite the fact that in the United Kingdom the excise duty is almost four times above that seen in France).

Table 6.6

Domestic beer sales by container, 1996[1]

	Draught beer		Returnable bottle		Non-returnable bottle		Can	
	1,000 hl	%	1,000 hl	%	1,000 hl	%	1,000 hl	%
EU-15 (2)	73,494	41.3	49,455	27.8	30,156	16.9	24,866	14.0
B	4,043	39.3	5,443	52.9	326	3.2	472	4.6
DK	591	9.3	5,772	90.7	0	0.0	0	0.0
D	:	17.6	:	64.9	:	3.4	:	14.1
EL	233	6.0	2,836	73.0	194	5.0	622	16.0
E	8,062	33.8	7,989	33.5	5,298	22.2	2,502	10.5
F	4,817	23.6	2,861	14.0	11,532	56.4	1,231	6.0
IRL	4,173	80.0	192	3.7	249	4.8	579	11.1
I	1,779	16.0	1,334	12.0	6,892	62.0	1,112	10.0
L	246	52.3	161	34.3	54	11.5	9	1.9
NL (3)	3,880	31.3	8,496	68.7	:	:	:	:
A	2,863	32.4	5,133	58.1	64	0.7	775	8.8
P	1,812	29.5	3,334	54.3	693	11.3	297	4.9
FIN	1,002	24.6	2,901	71.2	0	0.0	171	4.2
S	601	12.5	1,379	28.7	43	0.9	2,782	57.9
UK	39,392	65.5	1,624	2.7	4,811	8.0	14,314	23.8
N	618	26.9	1,644	71.5	12	0.5	25	1.1
CH	1,420	33.0	1,769	41.1	925	21.5	192	4.4

1) home production where import data are not available
2) excluding Germany for data in 1,000 hl
3) data for returnable bottles (in 1,000 hl) includes non-returnable bottles and cans

Source: CBMC

Consumption characteristics

When turning to consumption patterns, price may well play a large determining role in where beer is consumed. Added to this we should be aware of cultural differences, whereby consumption patterns vary between countries - namely home consumption or consumption in cafés, bars and restaurants. Looking at the data on estimates of beer consumption in the home we see the following differences. Consumption in the household ranges from just over ten per cent in Ireland to some eighty per cent in Sweden. The Scandinavian countries all have very high rates of consumption in the household: Finland (70%), Norway (70%) and Denmark (75%). On the other hand the anglo-saxon countries had the lowest consumption rates of beer within the household. Ireland (11%), the United Kingdom (27%), Spain (32%), Greece (35%) and Portugal (35%) all recorded very low rates of household consumption of beer.

Another factor that plays heavily on the demand for beer is the weather. In the Mediterranean countries there is a marked increase in the amount of beer drunk during the summer months, when beer is seen as a substitute for wine. On the other hand, in the more northern countries of the European Union there is a fairly constant distribution of consumption throughout the year - with the expected seasonal effects based around festive periods.

As well as demand being driven by the domestic preference for other substitute products (most notably wine) - the price of beer must also be taken into account (especially when consumed outside of the household). In France, Italy and Greece the consumption of alcohol (and in particular beer) can be limited in public places due to higher prices.

Product developments such as brand loyalty and bottled beers are being used to stimulate stagnant markets

There are a number of forms / packages in which beer is sold. Most notably, draught beer, bottled beers and canned beers. Draught beer accounts for a large share of the market in Ireland, the United Kingdom and Luxembourg (all over fifty per cent of total beer sales). However, Denmark, Germany, Greece, Italy and Sweden all have draught beer sales of less than twenty per cent of the total. Canned beers sell particularly well in Sweden (57.9%) and the United Kingdom (23.8%) - this may be due to environmental considerations. On the other hand, France (56.4%) and Italy (62.0%) have the highest rates of sales of non-returnable bottled beers - and hence rely on consumer good-will to recycle glass.

Table 6.7

Consumption imported (%)

	1990	1991	1992	1993	1994	1995	1996
EU-15 (1)	5.8	6.0	6.3	5.8	6.4	6.3	6.9
B / L	5.2	4.3	4.3	4.4	5.1	5.1	5.5
DK	0.4	0.3	0.3	0.3	0.7	1.8	1.4
D	1.8	2.5	2.6	2.4	2.4	2.3	2.0
EL	3.8	4.6	5.6	:	4.7	5.7	6.2
E	4.2	5.0	6.6	6.2	7.7	7.4	7.0
F	13.0	12.7	12.0	13.3	17.3	16.9	21.9
IRL	11.7	15.0	17.0	13.4	9.8	9.8	9.8
I	18.2	19.0	20.3	19.7	21.0	17.5	22.3
NL	4.5	5.7	3.9	4.3	4.1	4.6	4.7
A	2.8	3.0	3.0	2.9	3.1	3.4	3.8
P	1.6	2.0	1.8	2.2	2.7	3.6	3.2
FIN	1.3	1.5	1.5	1.1	1.3	2.0	1.8
S	8.2	9.7	9.2	7.2	7.8	6.9	9.6
UK	8.0	8.8	9.3	7.9	8.7	8.7	9.3
N (2)	0.1	0.1	0.1	0.2	2.9	1.7	1.7
CH	12.7	13.7	15.9	15.4	15.3	15.8	16.5

1) excluding Greece in 1993
2) including re-exports in 1994

Source: CBMC

Structure of the industry

With an increase in brand-loyalty and a shift in production processes, there has been a move towards increasing economies of scale. The large multinationals have switched marketing efforts to the newly developing markets of south-east Asia and Latin America - setting-up operations on foreign soil. The acquisition of competitors is the most common method of expanding market share. In recent years the major acquisitions have involved Dutch, German or British companies.

European legislation has tried to prevent the link between beer producing companies and property developments increasing - as companies have attempted to protect their markets through tied houses (cafés or bars where only a few restricted brands may be sold). Furthermore, traditional bars and cafés are increasingly under threat from alternative competition from the entertainment sector. This has led to many bars and cafés having to diversify. Such diversification may involve the introduction of food or the re-fitting of a bar to a certain theme (increase in Irish bars and other theme bars). This change in the retailing structure of the market has direct influence on the production of beer - notably the progression of Irish beer as an export product to countries such as France and Italy.

There has been a diverging trend seen within EU markets - for example, whilst brand loyalty and marketing of premium beers and foreign imported bottled beers has gained pace - there has been a development at the same time of beers brewed using traditional methods and natural products. One may imagine that the process of product diversification in an attempt to maintain consumer interest in a sluggish market will continue.

Table 6.8

Imports of beer according to countries of production (1,000 hl)

	Importing country															
	B / L	DK	D	EL	E	F	IRL	I	NL	A	P	FIN	S	UK	N	CH
EU-15	492	75	2,032	179	1,757	4,347	494	2,767	607	253	191	36	459	4,943	25	656
B / L		3	355	5	62	1,959	3	160	544	1	3	2	2	157	1	9
DK	117		1,139	4	12	114	2	394	0	0	1	9	96	39	2	9
D	103	22		87	407	804	16	1,316	44	239	7	4	28	1,357	1	180
EL	0	0	2		0	0	0	0	0	0	0	0	0	2	0	0
E	2	0	2	4		97	0	77	0	0	94	0	4	74	0	7
F	49	1	11	3	20		0	104	1	0	16	1	15	608	0	113
IRL	0	0	202	0	27	2		5	1	4	0	8	0	2,125	7	0
I	4	0	1	8	46	14	0		0	1	4	0	0	41	0	2
NL	120	2	287	51	897	518	138	257		7	62	5	46	523	2	234
A	0	0	4	7	15	1	0	120	0		0	0	3	0	0	32
P	12	0	19	0	152	53	0	0	0	0		0	0	16	0	54
FIN	0	0	0	0	0	0	0	0	0	0	0		197	0	2	0
S	0	1	2	0	0	3	0	0	0	0	0	1		1	2	1
UK	85	46	8	10	119	782	335	334	17	1	4	6	68		8	15
Norway	0	0	0	0	0	0	0	0	0	0	0	1	2	1		0
Switzerland	0	0	0	0	0	7	0	14	0	0	0	0	0	1	0	
Czech Republic	4	1	523	7	14	0	0	39	0	77	0	19	25	154	1	13
Africa	0	0	1	0	0	1	0	0	0	0	0	0	0	13	0	0
Asia	2	0	8	0	2	31	0	22	0	0	0	0	0	59	0	5
Australia	0	0	0	0	0	1	0	0	0	0	0	0	0	10	0	1
Mexico	64	4	16	20	65	:	3	52	6	8	2	3	5	33	8	5
USA	1	6	21	30	0	:	15	5	0	1	0	2	10	339	5	26
Others	3	6	11	3	3	95	0	166	2	12	2	12	5	38	0	2

Source: eurostat

Table 6.9

Total exports of beer (1,000 hl)

	1990	1991	1992	1993	1994	1995	1996
EU-15	24,594	26,069	27,948	29,517	34,848	36,105	37,633
B / L	2,752	3,326	3,505	3,844	4,592	4,608	4,462
DK	2,303	2,560	2,739	2,526	2,674	3,074	2,835
D	5,827	6,174	6,485	7,042	7,750	7,574	7,719
EL	30	58	130	130	250	230	300
E	230	259	314	293	360	356	358
F	1,089	1,017	1,028	1,012	1,289	1,444	1,791
IRL	2,495	2,615	2,851	3,130	3,255	3,260	3,300
I	189	154	136	217	242	439	428
NL	7,209	6,888	7,349	7,808	9,357	10,353	11,012
A	482	807	729	775	1,005	665	710
P	311	295	484	424	608	718	721
FIN	28	43	75	119	208	305	294
S	25	31	39	97	90	60	49
UK	1,624	1,842	2,084	2,100	3,168	3,019	3,654
N	21	18	17	14	20	10	14
CH	57	56	48	41	38	33	30

Source: CBMC

Foreign trade in beer

Six of the Member States were able to record export rates in excess of 10% during 1996, they were: the Netherlands (46.9%), Ireland (41.2%), Belgium and Luxembourg (31.5%), Denmark (30.0%) and Portugal (10.7%). Export rates have risen in all of these countries since 1991 by between 0.3 percentage points in Ireland and 12.9 percentage points in the Netherlands (with the exception of Austria).

The costs involved in transporting beer can clearly have a negative impact on trading possibilities. Nevertheless, with modern production techniques it is possible to transport beer over far larger distances than a few decades ago (although with draught beer it remains difficult). Nevertheless, the largest market for Dutch beer is in Spain and not Belgium and Luxembourg or Germany as one may expect.

Imports from countries outside of the EU do not normally account for more than twenty per cent of total imports into a particular country. The largest non-European countries having trade with the EU are the Czech Republic, the USA and Mexico. The Czech Republic largely imports into Germany and the USA into the United Kingdom.

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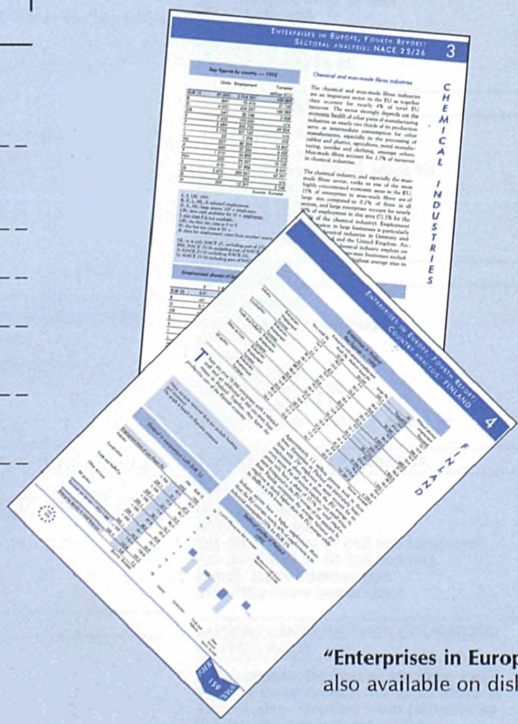

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