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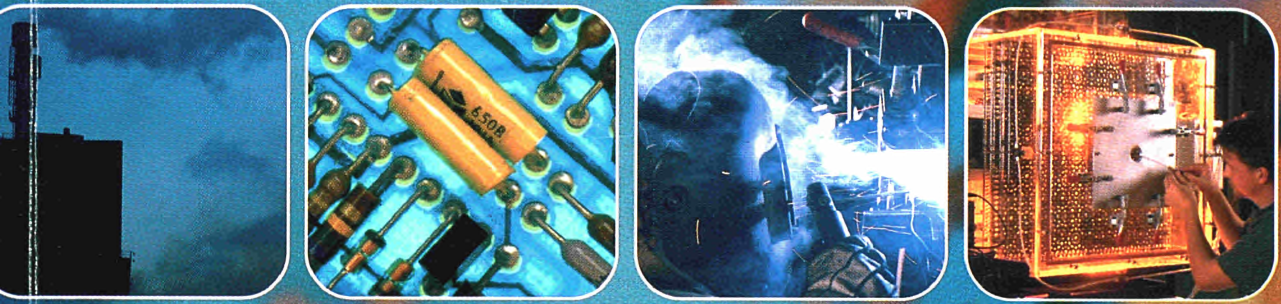
Monthly Panorama of European Industry



eurostat

ISSUE 11/98 ■ NOVEMBER 1998

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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 November 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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E d i t o r i a l

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

Latest outlook - the most recent short-term indicators for European services in tabular and graphic format, page 51

In depth - a close look into the textiles and textile products industry, page 67

Special focus - a feature on subcontracting in textiles and clothing industries, page 93

This edition of the Monthly Panorama is the penultimate for this year. We are therefore already turning our attention to the contents and articles that have to be produced for calendar year 1999. If readers have any particular requests regarding areas of European business statistics that they feel deserve coverage in the publication or if there are key variables which readers feel should be introduced to the publication, please do not hesitate in contacting the editor-in-chief.

We have planned to expand the coverage of the publication to include more information on service sectors of the European economy, which account for two thirds of value-added in Europe. Hence, some of the in-depth articles found in the second half of the publication will focus on areas of the service economy.

Furthermore, there are plans to release up to six special issues of the Monthly Panorama next year, these publications will provide information on a particular subject, for example construction, competitiveness or trade performance within the EU.

There will also be a switch from the diskette that is provided with the publication to a CD-ROM. This will allow us to give readers more data each month. Furthermore, the CD-ROM will contain an electronic version of the publication in PDF format. Subscribers will be given the choice of either a paper copy, the electronic version or both formats of the publication.

We look forward to receiving your comments and hope to be able to include them in an attempt to adapt the publication to meet as closely as possible user needs.

Pedro Díaz Muñoz,
Luxembourg

Contents

The Monthly Panorama of European Industry has the objective of furnishing readers with an instrument which will allow them to follow the evolution of industrial short-term trends and also show the structure and activity of 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.

This publication is a project of Eurostat unit D3. 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:
Chemicals
Rubber and plastic products

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Data extracted on 10-11-98

1. Industrial commentary

1. Industrial commentary

Industrial production in Europe

Production volumes in Europe were seen to be expanding in the three months to July 1998. Industrial production rose by 1.0% when comparing the period May 1998 to July 1998 with the period February 1998 to April 1998. This growth rate and those that follow in the first part of this article take account of seasonal effects and also of one-off fluctuations and irregularities that may occur in the data. The corresponding growth rate for the month of June 1998 for EU-15 was also equal to 1.0%. Industrial production in Europe grew at the pace of 1.0% to 1.1% in all months from October 1997 through to July 1998. A similar picture was seen for the countries that will form the Euro zone[1] for Monetary Union from the 1st January 1999. These eleven countries recorded aggregate growth of industrial production volumes of between 1.0% and 1.2% for all months between October 1997 and July 1998. The latest growth rate for the EUR-11 aggregate in July 1998 was 1.0%. With the exception of Luxembourg, all the Member States of the EU reported positive growth rates for industrial production (although the latest data available ranges between April and August 1998, according to the country being studied).

Industrial production in the four largest European economies

If we turn our attention to the four largest European economies the following growth rates were recorded for the three months to August 1998 (unless stated): Germany (1.1%), France (-0.2% to June 1998), the United Kingdom (0.7% to July 1998) and Italy (0.1%). Germany has now posted an increase in industrial production in excess of 1.0% (using this measure) for each of the last eighteen months. In France there has been a tendency to see the growth of industrial production slow in recent months. This trend first became apparent at the start of 1998. French output was rising by 1.8% in October 1997 and subsequently slowed through to the spring of 1998, when the rate of growth remained stable at around 1.2%. However, the latest data available shows a reduction in the growth rate for the first time in twenty months. In Italy there has been little or no change in the rate of change of industrial output since the start of 1998. The change in output has fluctuated between -0.1% and 0.3% dur-

1) Belgium, Germany, Spain, France, Ireland, Italy, Luxembourg, the Netherlands, Austria, Portugal and Finland.

Data marked with this symbol is available on the diskette - for further details see page 88

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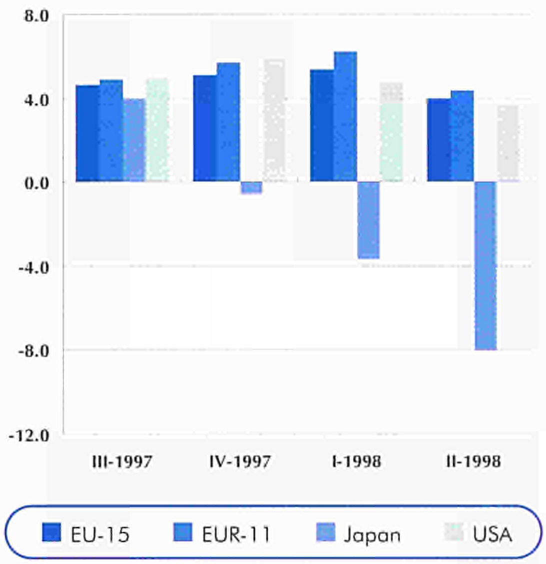
European industrial production grew by 1.0% in the three months to July 1998

Figure 1.1



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

Source: eurostat

ing the first eight months of 1998. The United Kingdom was also recording almost no change in production back in the summer of 1997. However, since this period there has been a gradual increase in output, with growth in excess of 0.5% being recorded for the last four months for which data is available.

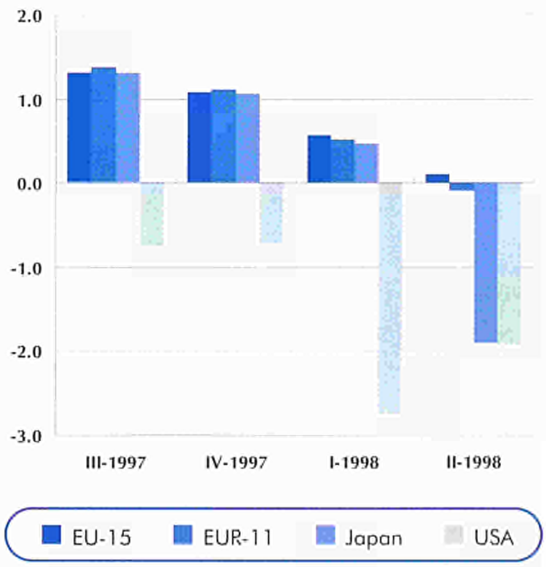
Output in the USA and Japan

Turning to recent production trends in the United States and Japan we can note that Europe is currently experiencing higher rates of production growth than either of the other two members of the Triad. The most recent data available is through until June 1998, when United States output was rising by 0.6% (when compared to the first quarter) and Japanese output was reduced by almost three per cent (again compared to the first quarter of 1998).

In The United States growth of more than one per cent was recorded for a one year period between February 1997 and January 1998. However, data for the next five months of 1998 has shown that output in the USA has not been expanding at such a fast pace. Growth of only 0.2% was recorded in April 1998 - although, the most recent figures show that there may be a return to higher growth rates.

In Japan, the latest data posted for the tenth successive month a decline in industrial production. Furthermore the reduction in levels of activity for the Japanese industry economy show no signs of abating, as the trend shows the decline in output becoming more exacerbated.

Figure 1.2

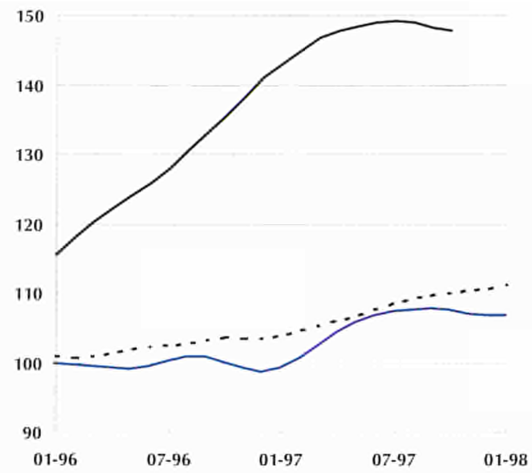


Producer prices: growth rate, year on year (%)

Source: eurostat

Figure 1.3

New orders index (1995 = 100)



Source: eurostat

Producer prices fell by 0.8% in the year to August 1998

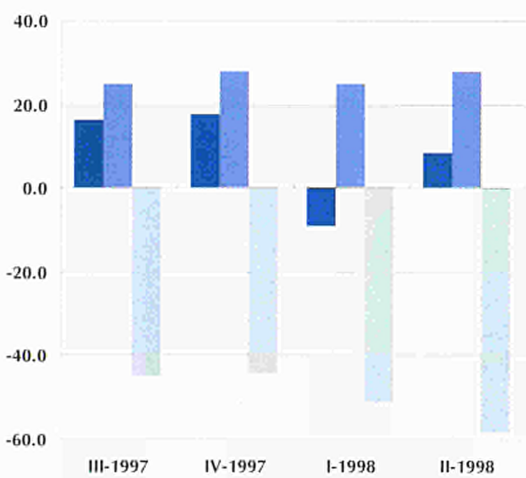
Year-on-year changes in output

The figures that follow look at the growth of industrial production volumes for a given month compared to the same month of a year before. The growth rates used take account of variations in the number of working days between years.

In July 1998, EU-15 output rose by 4.1% compared to July 1997. The figure for the Euro zone was slightly higher with growth equal to 4.3% (again in July 1998). The expansion in the German industrial economy was quite marked, with growth rates as high as 8.0% in May 1998. Latest figures for August 1998 were still recording high rates of expansion (output up by 7.1%). In Spain the rate of growth was also quite high (up by 6.9%, although data extended only as far as June 1998). Growth rates in France, the United Kingdom and Italy for total industrial production were not as pronounced. In France there was growth of 2.6% in the twelve months to August 1998. In the United Kingdom growth was equal to 2.0% in the twelve months to July 1998. Of the major European economies, Italy recorded the lowest rates of growth, with the change in output for total industry equal to -2.4% per annum through to August 1998. This negative rate could largely be attributed to reduced activity within the Italian consumer durables sector (where the latest data available saw a change of -16.6%).

Figure 1.4

Quarterly trade balance - manufactured goods (billion ECU)



Source: eurostat

Performance within the four goods sectors

Data for the European industrial economy may be sub-divided into the different goods sectors (intermediate goods, capital goods and consumer durables and non-durables). We can observe that quite large differences in the performance of these four goods sectors exists. Latest year-on-year growth rates for EU-15 ranged from 1.9% in the consumer non-durables sector to 8.4% in the capital goods sector. Corresponding rates for the intermediate goods sector and the consumer durables

Industrial production (working day adjusted) & trade balance

goods sector were 2.9% and 7.4%. In Germany, the highest growth rate of any of the four goods sectors was recorded by consumer durables (up 18.3%). There was almost no growth in the German consumer non-durables sector (0.3%), again rates of change refer to annual growth rates to August 1998.

Producer prices in Europe

Changes in producer prices are traditionally measured as the change of one month compared to the same month of a year before. These series are not treated in any way: in other words, data are reported as gross figures. The latest data available for the EU-15 aggregate recorded a change of -0.8% during the twelve months to August 1998. This was the third consecutive month that producer prices were in decline in Europe. A corresponding figure was unfortunately not available for the Euro zone, where the latest figure was for June 1998, down by 0.4%.

Within the different goods sectors of the European economy it was not possible to look at growth beyond June 1998 (except for capital goods). One goods sector reported a negative trend, intermediate goods recorded a reduction of 1.2% for June 1998. Corresponding figures for the consumer durables sector (0.2%) and consumer non-durables (0.9%) continued to display positive growth rates (both to June 1998), as did capital goods, up by 0.7% (through to August 1998).

Table 1.1

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

	EU-15	EUR-11	Japan	USA
08-97	4.2	4.7	4.9	5.0
09-97	4.1	4.2	3.1	4.8
10-97	5.4	5.9	1.3	5.8
11-97	4.2	4.8	-1.0	5.9
12-97	5.6	6.5	-2.1	6.0
01-98	4.7	5.8	-1.8	5.0
02-98	5.1	6.0	-3.7	4.3
03-98	6.2	6.9	-5.2	4.9
04-98	3.1	3.2	-6.4	3.1
05-98	5.6	6.8	-9.2	4.5
06-98	3.2	3.2	-8.6	3.5
07-98	4.1	4.3	:	:

Source: eurostat

Table 1.2

Monthly trade balance - manufactured goods (billion ECU)

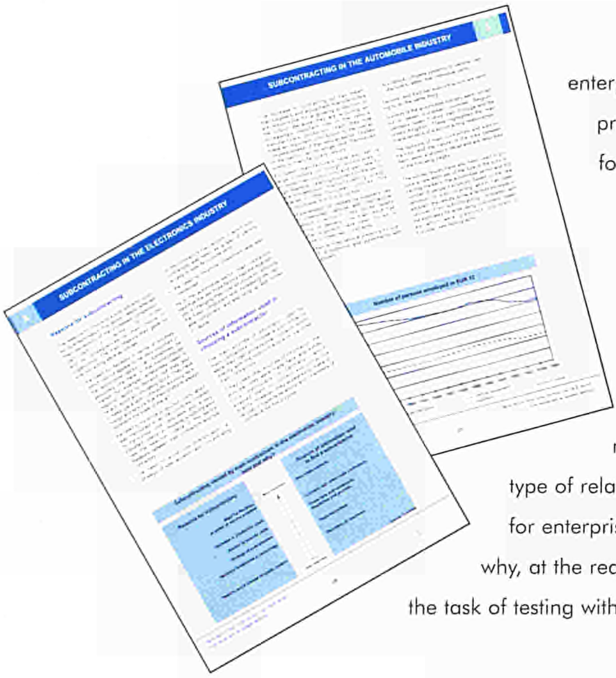
	EU-15	Japan	USA
09-97	3.3	9.6	-15.0
10-97	6.4	9.4	-14.5
11-97	4.2	8.7	-14.6
12-97	6.8	9.8	-15.3
01-98	-4.6	3.9	-15.7
02-98	-6.5	10.8	-16.6
03-98	2.0	10.2	-18.9
04-98	2.1	9.4	-19.6
05-98	2.9	9.4	-20.4
06-98	3.3	8.9	-18.6
07-98	:	9.6	-19.2
08-98	:	6.8	-21.1

Source: eurostat

At the level of the individual Member States there was a reduction in producer prices recorded in eleven of the fourteen Member States (there is no data available for Austria for producer prices). The three countries that recorded growth in prices were Greece, Luxembourg and Portugal. It should be noted that data for several countries (notably Ireland and Portugal) runs well behind the August 1998 figure quoted for the EU (which includes estimates for missing values).

Greece reported the highest rates of growth in Europe, with producer prices for total industry rising by 3.8% in the twelve months to June 1998. Producer prices fell by 1.0% in Germany in September 1998 (compared to a year before). The decline in prices in France was much greater (down by some 3.0%). There was a moderate decline in Italian producer prices, which fell by 0.5%.

Other Eurostat products



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: total industry

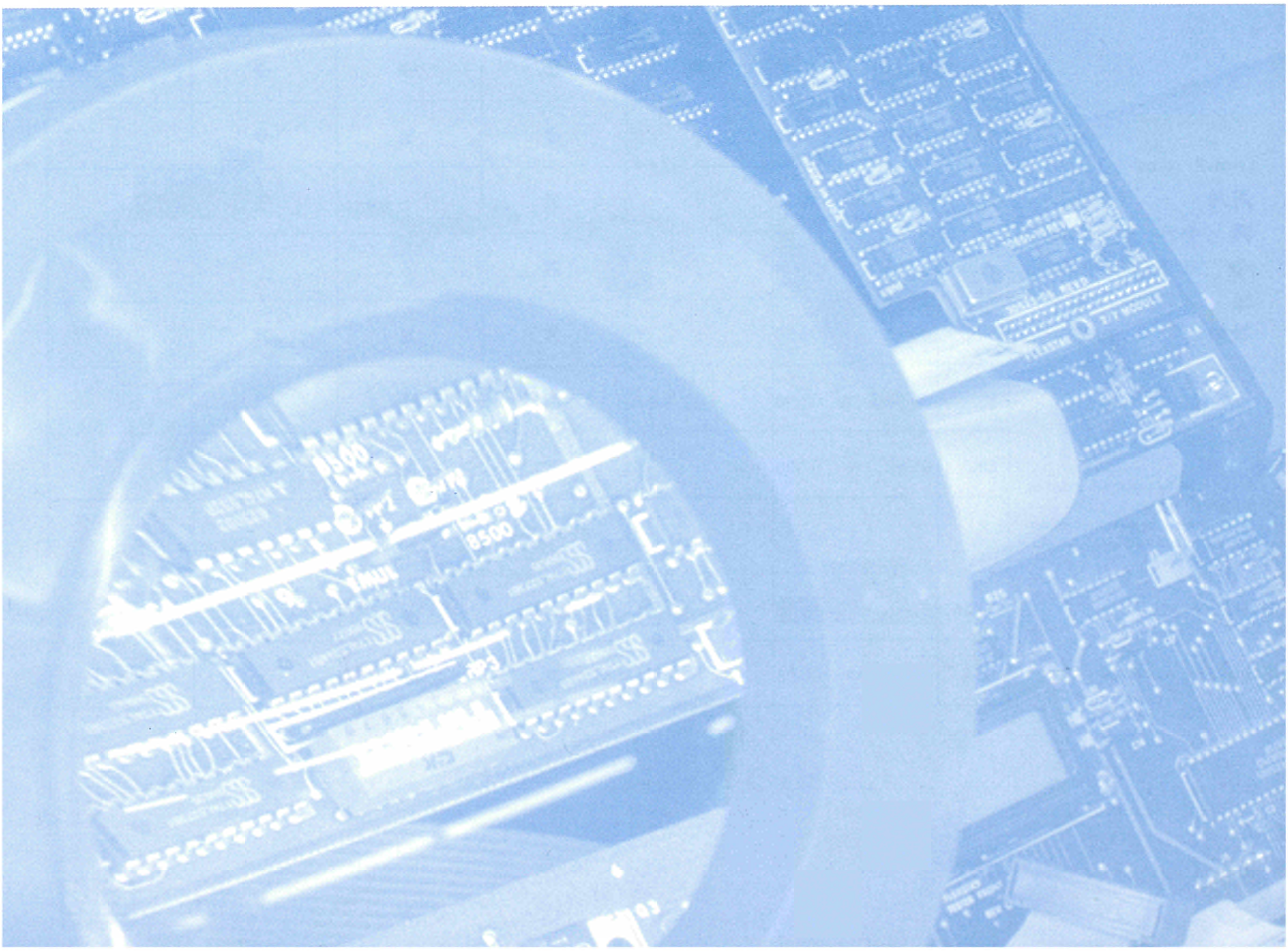


Table 2.1

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	05-98 ⇨ 07-98	:	↗	→	↗	:
B	05-98 ⇨ 07-98	:	↗	:	↗	:
DK	06-98 ⇨ 08-98	:	↗	↘	↗↗	↗
D	06-98 ⇨ 08-98	:	↗	→	↗	↘
EL	05-98 ⇨ 07-98	:	↗	:	↘	:
E	04-98 ⇨ 06-98	↗	↗	→	↗	:
F	06-98 ⇨ 08-98	:	→	↘	→	:
IRL	04-98 ⇨ 06-98	:	↗↗	:	:	:
I	06-98 ⇨ 08-98	:	→	→	↗	:
L	04-98 ⇨ 06-98	↗	↘	→	→	↗
NL	06-98 ⇨ 08-98	:	→	↘	→	:
A	04-98 ⇨ 06-98	:	↗	:	→	:
P	02-98 ⇨ 04-98	:	↗	:	:	:
FIN	06-98 ⇨ 08-98	:	↗	↘	↗	:
S	06-98 ⇨ 08-98	:	↗	→	↗	:
UK	05-98 ⇨ 07-98	:	↗	↘	↘	:
Japan	04-98 ⇨ 06-98	:	↘↘	↘	:	:
USA	04-98 ⇨ 06-98	:	↗	→	:	:

Growth rates:

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

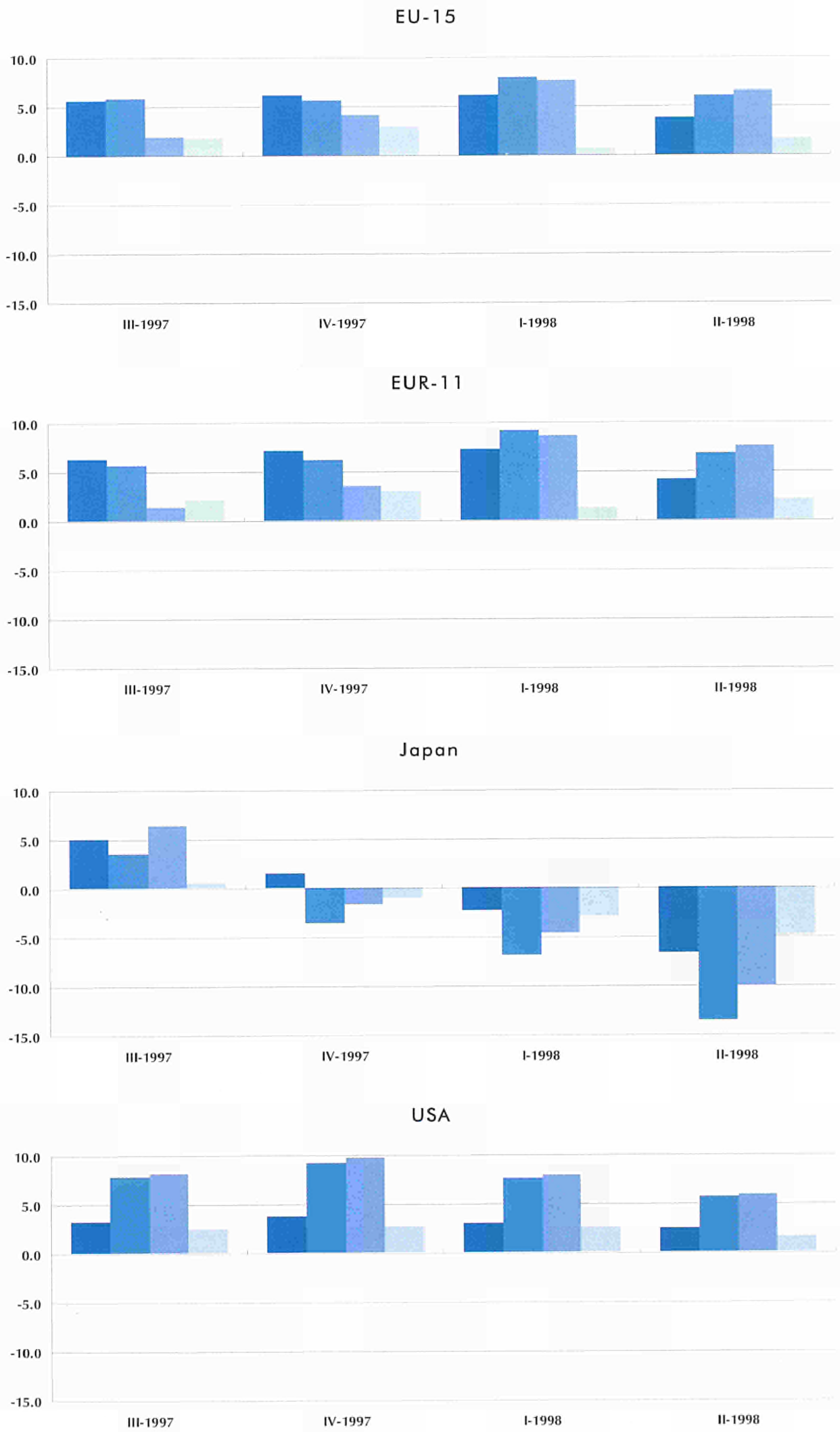
1) EOI runs two months ahead of the period given.
2) Capacity utilisation is fixed on the first month of the quarter of the period given.

Source: eurostat

Production index (working day adjusted)

Figure 2.1

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



Intermediate goods

Capital goods

Consumer durables

Consumer non-durables

Source: eurostat

Table 2.2

Industrial production: indices (1995 = 100)

	1995	1996	1997	03-98	04-98	05-98	06-98	07-98	08-98
EU-15	100.0	100.3	104.1	107.8	107.8	108.1	108.3	109.1	:
B	100.0	100.8	105.3	108.6	110.5	110.5	112.0	114.1	:
DK	100.0	101.1	105.5	110.8	97.5	99.5	108.7	109.7	110.3
D	100.0	100.4	103.8	111.6	106.8	109.5	108.3	109.8	110.8
EL	100.0	101.0	102.7	108.1	109.8	110.1	112.1	113.2	:
E	100.0	99.0	105.9	110.1	110.1	112.1	112.7	:	:
F	100.0	99.9	104.0	109.0	108.4	109.2	109.1	108.8	108.8
IRL	100.0	108.0	124.5	140.0	139.1	138.2	141.0	:	:
I	100.0	97.2	99.8	101.3	101.0	101.3	101.1	101.3	101.0
L	100.0	99.6	106.3	111.2	108.6	108.4	109.8	:	:
NL	100.0	102.7	104.7	105.3	107.3	105.6	106.3	107.3	104.1
A	100.0	100.6	106.7	108.6	108.9	109.8	112.0	:	:
P	100.0	101.3	103.9	109.5	108.6	:	:	:	:
FIN	100.0	103.8	113.1	121.1	122.6	122.8	118.8	124.7	121.4
S	100.0	103.1	111.2	113.3	115.6	114.1	117.3	115.9	116.8
UK	100.0	100.9	102.3	102.7	104.0	102.8	103.5	103.9	:
Japan	100.0	102.0	105.8	100.1	98.7	97.0	98.3	:	:
USA	100.0	103.5	108.6	111.7	112.2	112.5	111.8	:	:

Source: eurostat

Table 2.3

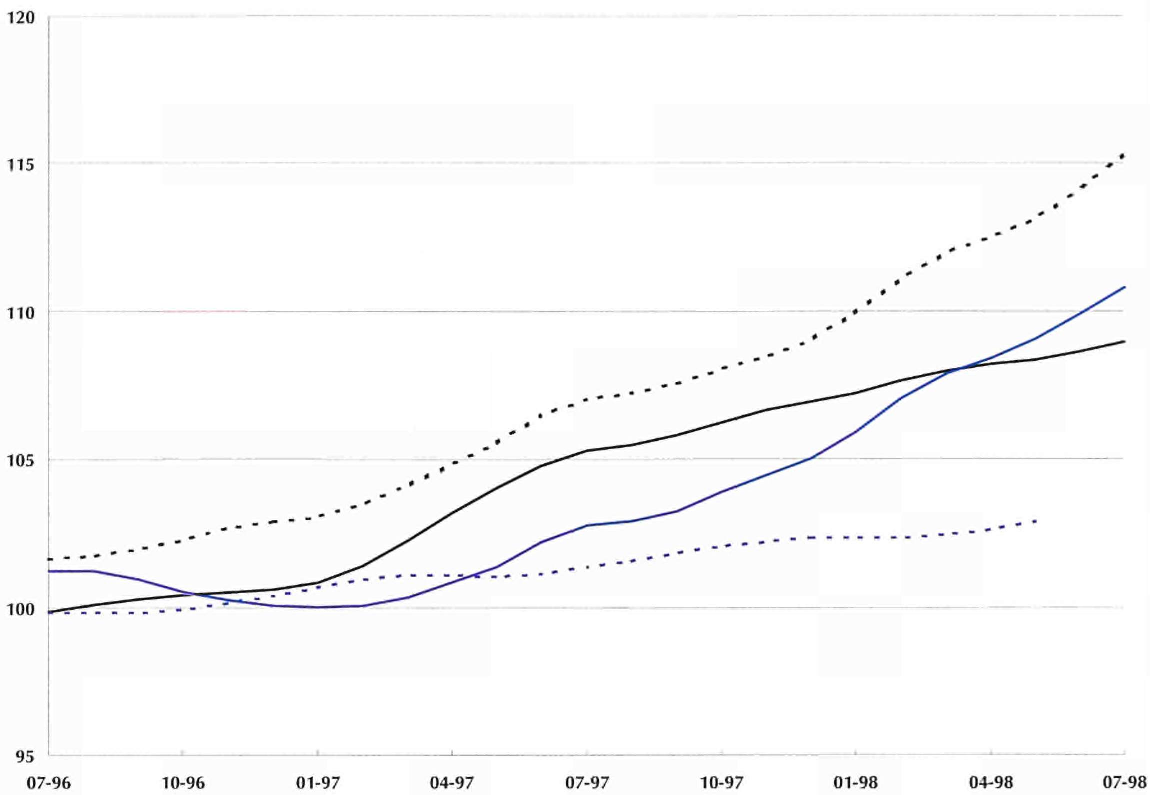
Industrial production for the main industrial groupings: indices (1995 = 100)

	1995	1996	1997	02-98	03-98	04-98	05-98	06-98	07-98
Total industry									
EU-15	100.0	100.3	104.1	107.2	107.8	107.8	108.1	108.3	109.1
Japan	100.0	102.0	105.8	102.4	100.1	98.7	97.0	98.3	:
USA	100.0	103.5	108.6	111.1	111.7	112.2	112.5	111.8	:
Intermediate goods									
EU-15	100.0	99.6	104.4	107.6	108.2	108.2	108.3	108.4	109.1
Japan	100.0	100.0	104.5	102.0	98.9	97.7	97.2	97.3	:
USA	100.0	102.4	106.3	108.6	108.3	108.6	109.0	109.0	:
Capital goods									
EU-15	100.0	101.9	106.2	110.8	113.6	111.7	112.8	112.9	116.8
Japan	100.0	106.4	109.8	103.4	103.5	96.7	91.9	95.3	:
USA	100.0	105.2	113.2	116.9	118.1	118.6	118.9	118.5	:
Consumer durables									
EU-15	100.0	100.5	102.1	108.1	108.8	107.8	108.8	109.1	112.3
Japan	100.0	102.7	111.0	108.3	102.4	102.2	102.3	106.1	:
USA	100.0	106.2	114.8	119.2	119.8	120.7	121.3	120.1	:
Consumer non-durables									
EU-15	100.0	99.6	:	102.1	102.2	102.5	103.2	:	:
Japan	100.0	100.1	101.0	97.1	96.6	98.0	96.5	97.9	:
USA	100.0	100.6	103.5	105.3	104.9	105.5	105.0	104.9	:

Source: eurostat

Production index (trend cycle)

Figure 2.2



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

Source: eurostat

	Latest 3 months available			Total industry	Intermediate goods	Capital goods	Consumer durables	Consumer non-durables
EU-15	05-98	⇨	07-98	1.0	0.7	2.1	2.0	:
B	05-98	⇨	07-98	2.1	1.9	4.3	-0.3	0.4
DK	06-98	⇨	08-98	2.2	2.3	3.9	5.7	0.3
D	06-98	⇨	08-98	1.1	0.6	1.4	2.3	0.1
EL	05-98	⇨	07-98	2.3	3.0	5.8	1.5	1.5
E	04-98	⇨	06-98	1.4	1.2	2.8	2.1	0.8
F	06-98	⇨	08-98	-0.2	:	:	:	:
IRL	04-98	⇨	06-98	2.8	3.9	5.0	:	:
I	06-98	⇨	08-98	0.1	-0.1	0.2	0.1	0.1
L	04-98	⇨	06-98	-0.9	-3.8	3.6	-4.4	0.7
NL	06-98	⇨	08-98	0.2	0.8	1.6	1.6	0.5
A	04-98	⇨	06-98	1.3	:	1.9	7.6	0.2
P	02-98	⇨	04-98	1.6	1.0	8.3	3.2	-0.7
FIN	06-98	⇨	08-98	1.0	0.7	4.2	1.1	0.6
S	06-98	⇨	08-98	1.5	0.7	5.0	3.5	0.7
UK	05-98	⇨	07-98	0.7	0.6	1.5	-0.4	0.2
Japan	04-98	⇨	06-98	-2.9	-2.9	-6.0	-3.1	-0.7
USA	04-98	⇨	06-98	0.6	0.6	0.9	0.7	0.1

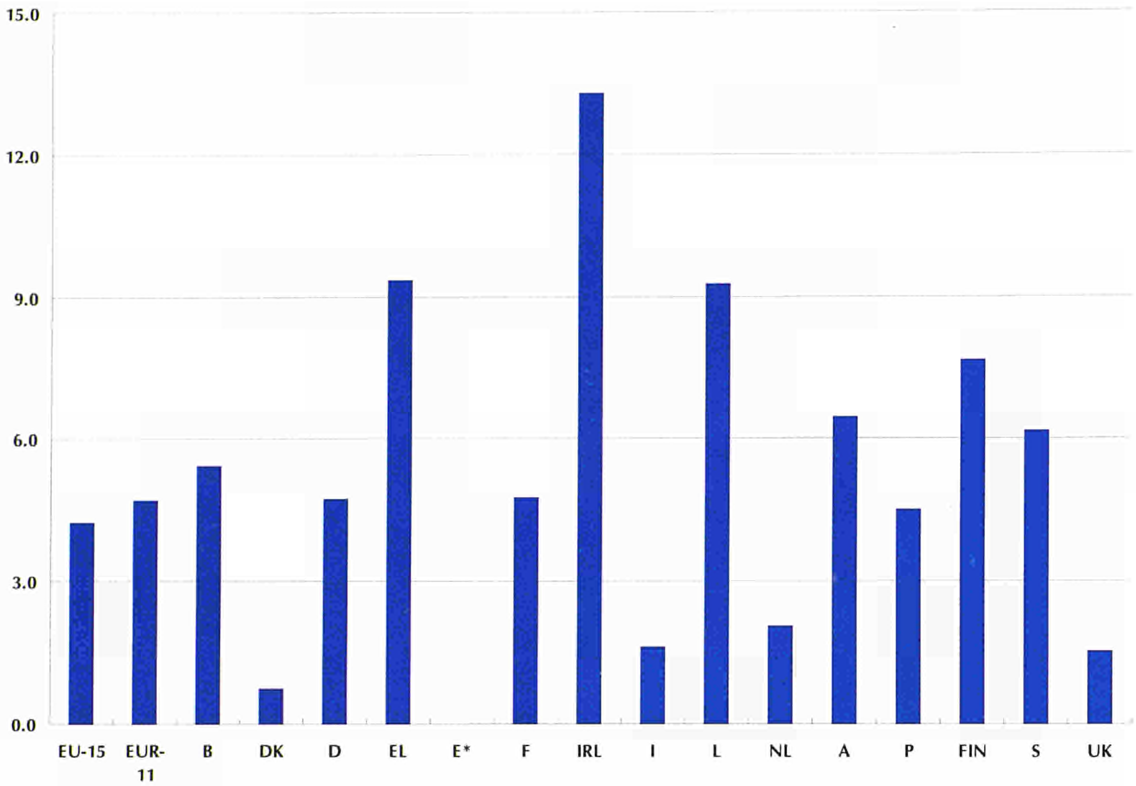
Table 2.4

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

Source: eurostat

Figure 2.3

Industrial production for total industry: growth rate, three months compared to the same three months of the previous year, 05-98 to 07-98 (%)



Source: eurostat

Table 2.5

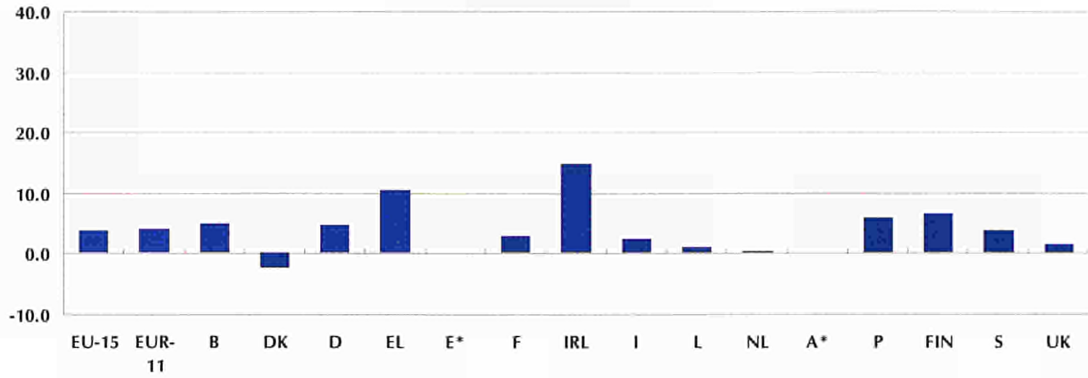
Industrial production for the main industrial groupings: growth rate, three months compared to the same three months of the previous year (%)

	Latest 3 months available			Total industry	Intermediate goods	Capital goods	Consumer durables	Consumer non-durables
EU-15	05-98	⇨	07-98	4.3	3.7	7.2	7.6	2.1
B	05-98	⇨	07-98	5.5	4.8	11.7	-2.3	3.8
DK	06-98	⇨	08-98	4.0	1.2	8.6	15.9	1.7
D	06-98	⇨	08-98	4.4	4.0	6.6	9.2	0.3
EL	06-98	⇨	08-98	10.4	11.7	17.3	-5.5	7.4
E	04-98	⇨	06-98	5.6	4.2	10.8	10.5	3.0
F	06-98	⇨	08-98	3.7	1.3	7.4	12.1	4.7
IRL	05-98	⇨	07-98	13.3	14.9	19.7	:	5.2
I	06-98	⇨	08-98	0.1	0.5	2.0	-3.3	-0.6
L	06-98	⇨	08-98	7.5	-1.5	20.2	-24.0	33.3
NL	06-98	⇨	08-98	1.3	-0.2	2.3	1.5	3.4
A	05-98	⇨	07-98	6.5	:	15.1	30.7	4.2
P	06-98	⇨	08-98	3.9	5.7	10.3	2.6	-2.8
FIN	06-98	⇨	08-98	5.2	4.6	14.6	-0.7	1.5
S	06-98	⇨	08-98	6.8	3.9	11.3	15.7	1.5
UK	05-98	⇨	07-98	1.5	1.6	2.6	-3.5	0.4
Japan	04-98	⇨	06-98	-8.0	-6.7	-13.6	-10.1	-4.9
USA	04-98	⇨	06-98	3.7	2.4	5.7	5.9	1.6

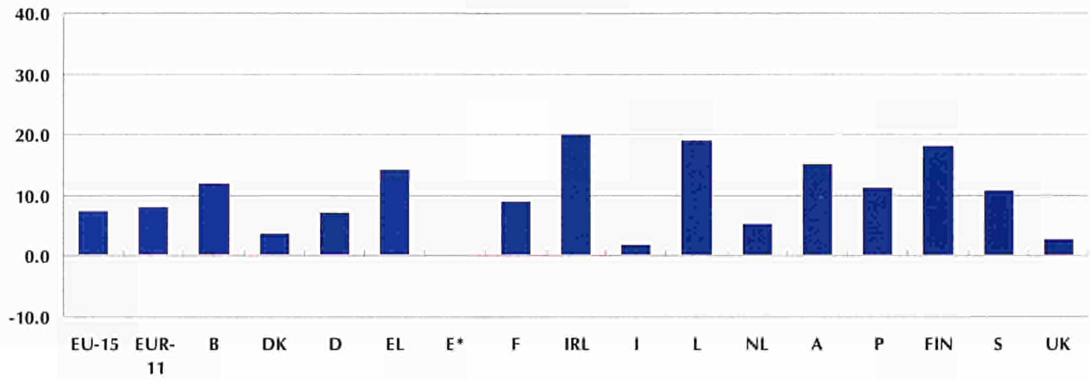
Source: eurostat

Production index (working day adjusted)

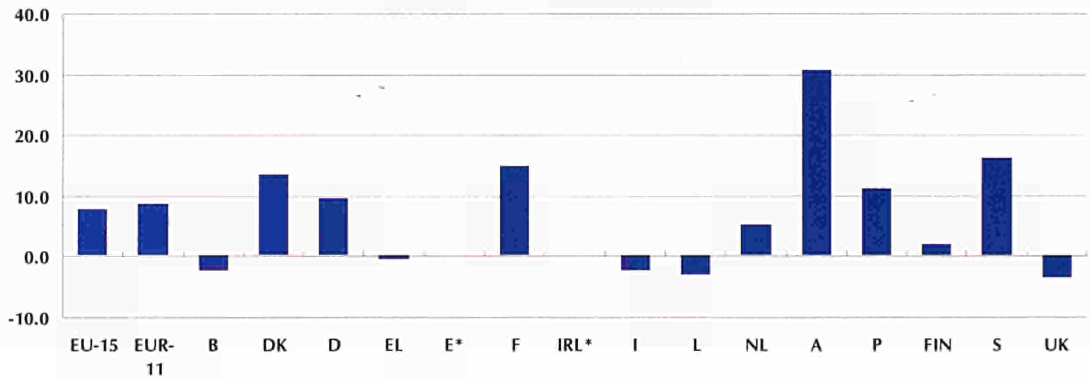
Intermediate goods



Capital goods



Consumer durables goods



Consumer non-durables goods

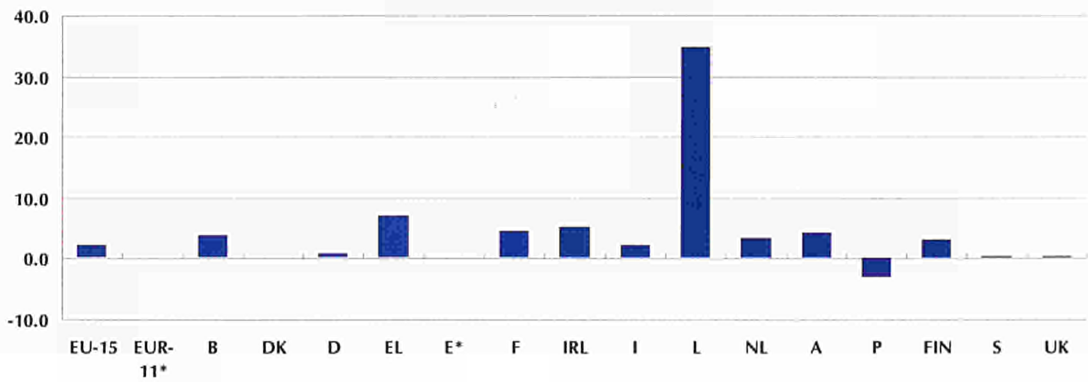


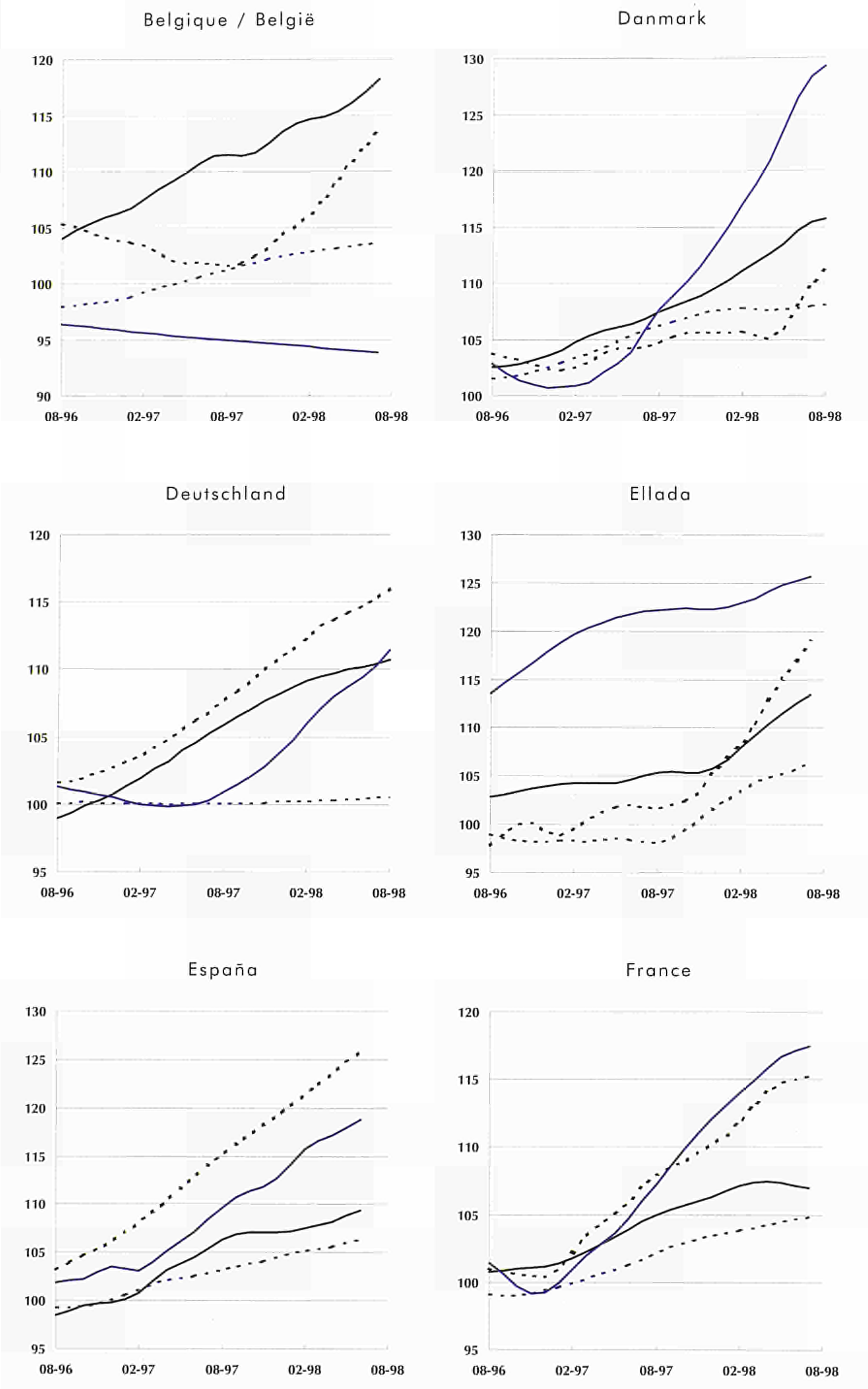
Figure 2.4

Industrial production for the main industrial groupings: growth rate, three months compared to the same three months of the previous year, 05-98 to 07-98 (%)

Source: eurostat

Figure 2.5

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



Intermediate goods ———

Capital goods - - - - -

Consumer durables ———

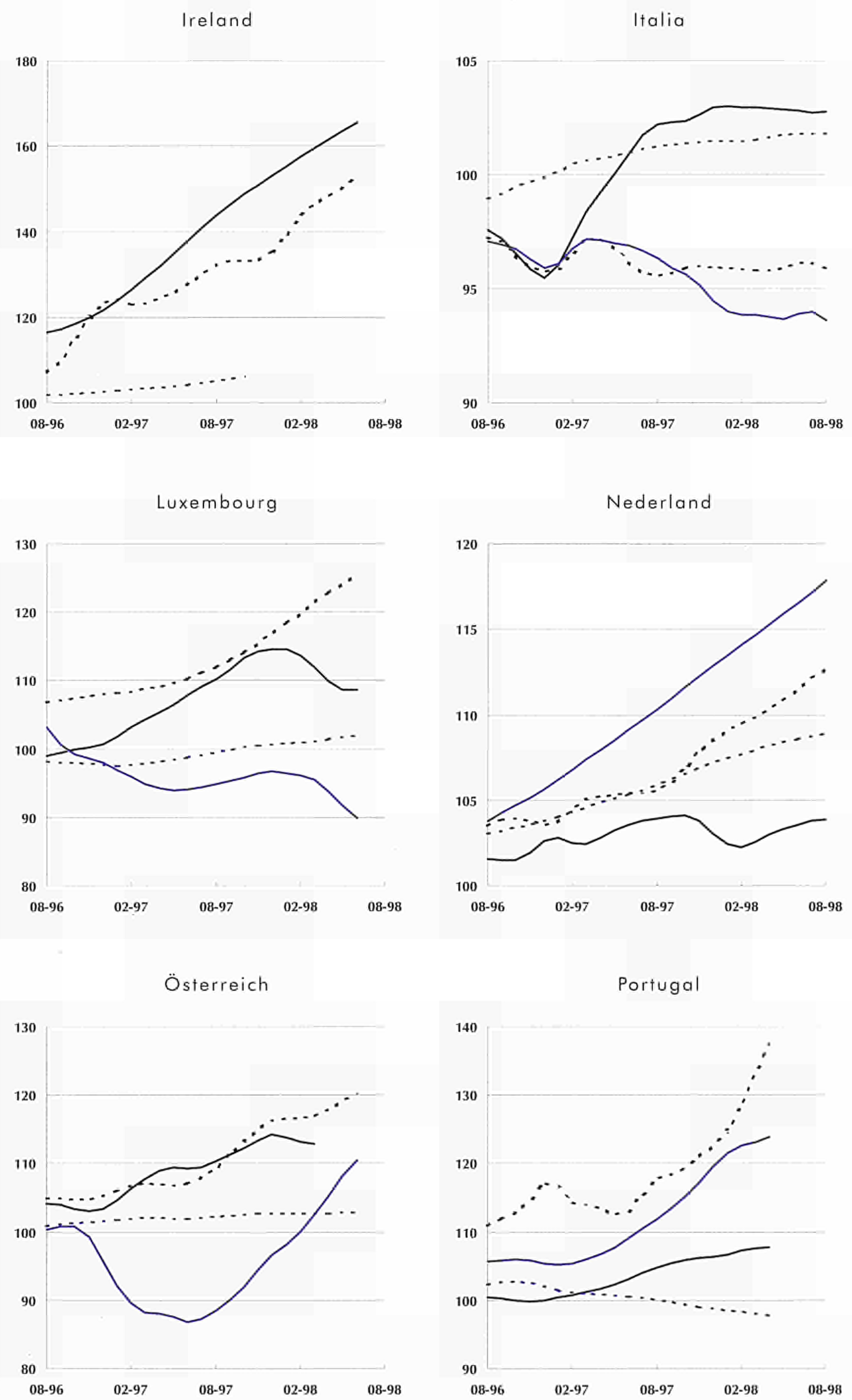
Consumer non-durables - - - - -

Source: eurostat

Production index (trend cycle)

Figure 2.5

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



Intermediate goods

Capital goods

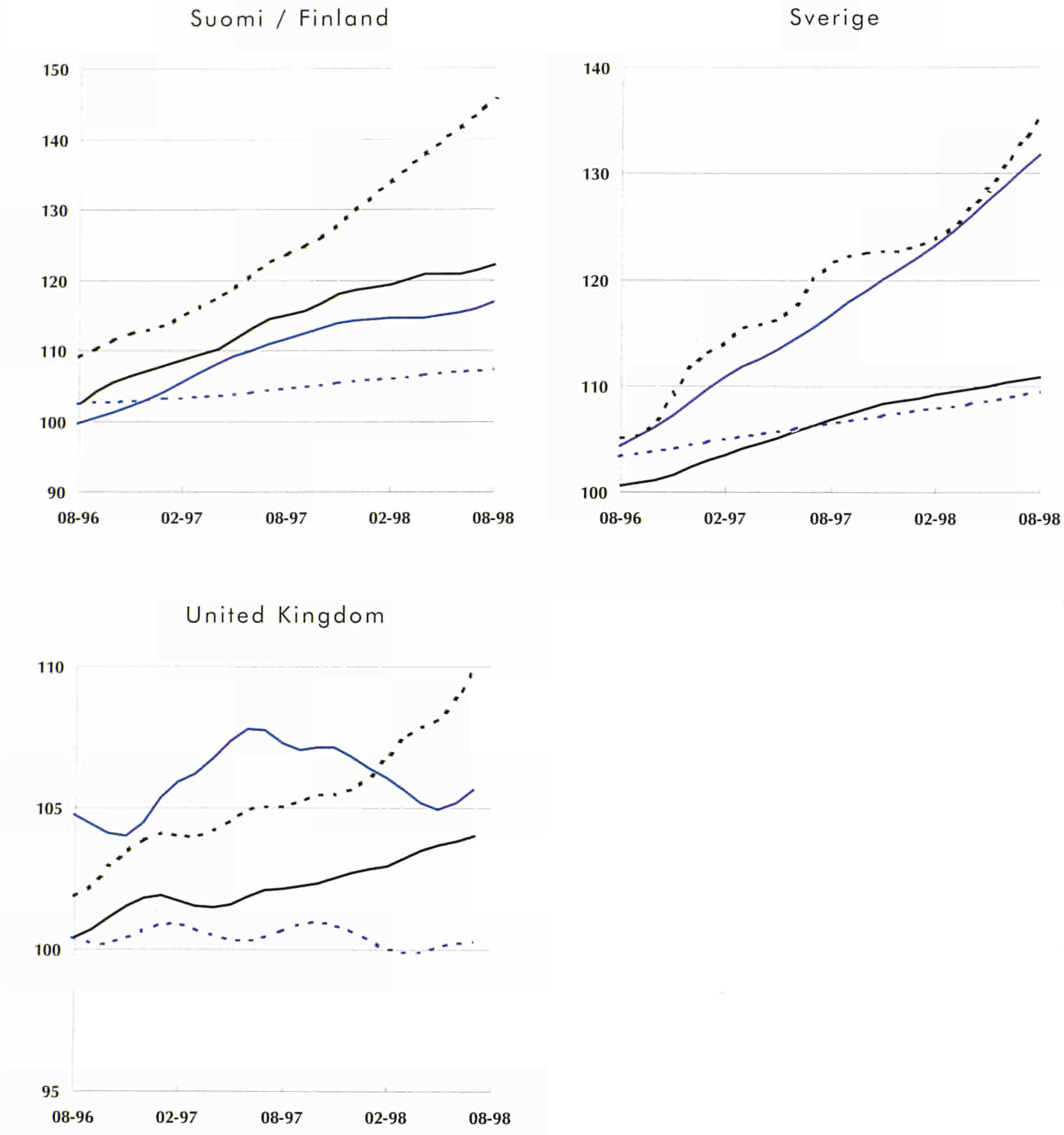
Consumer durables

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 - - - - -

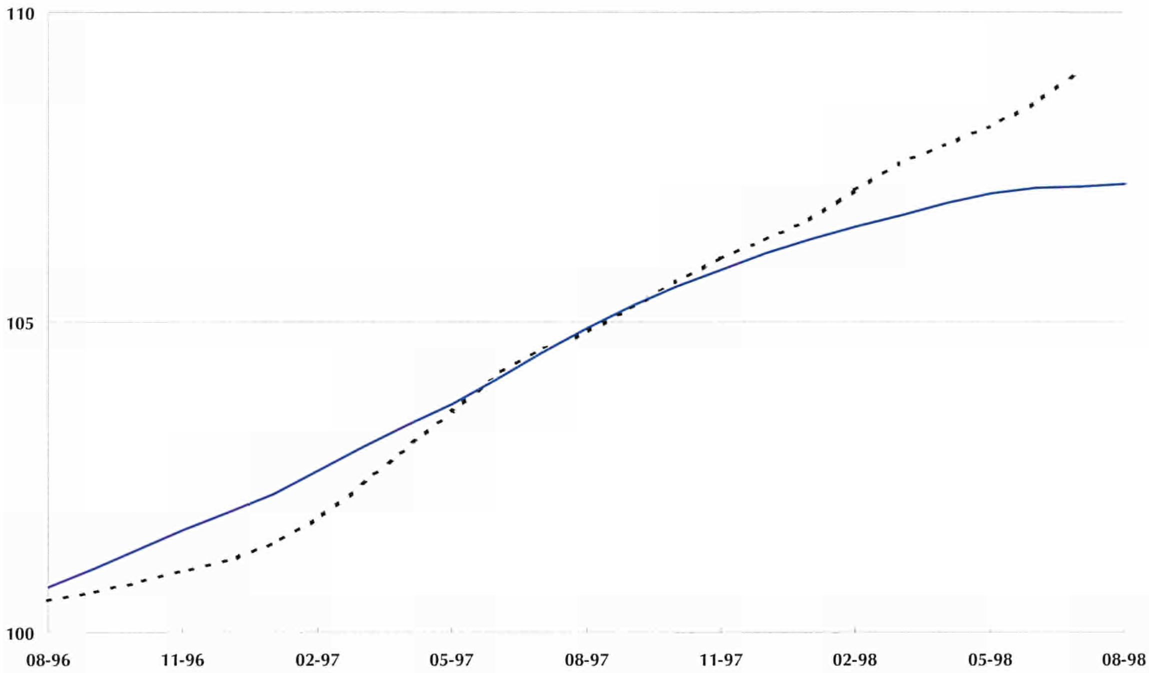
Source: eurostat

Further information - 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 89.

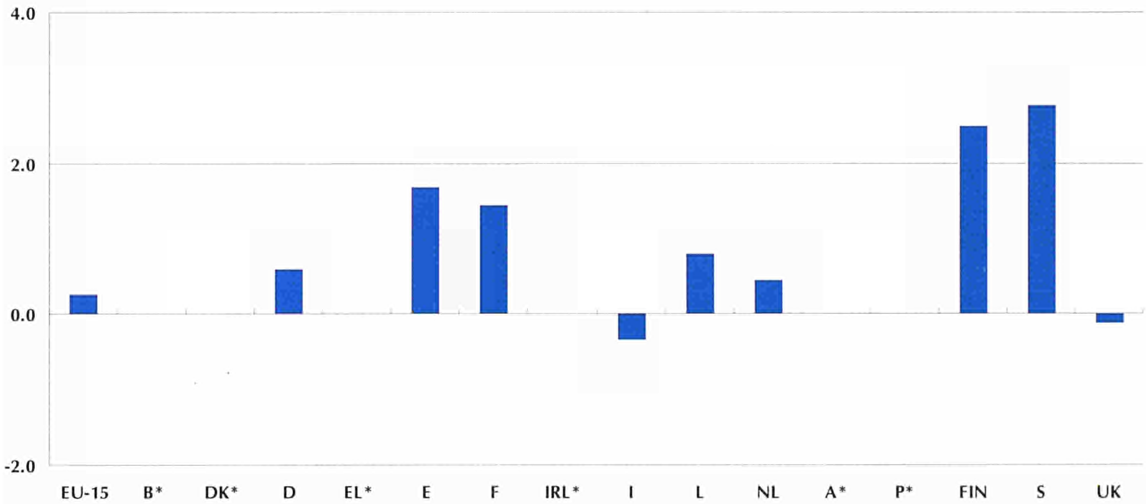
Production index (expected output index)

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, 06-98 to 08-98 (%)



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.

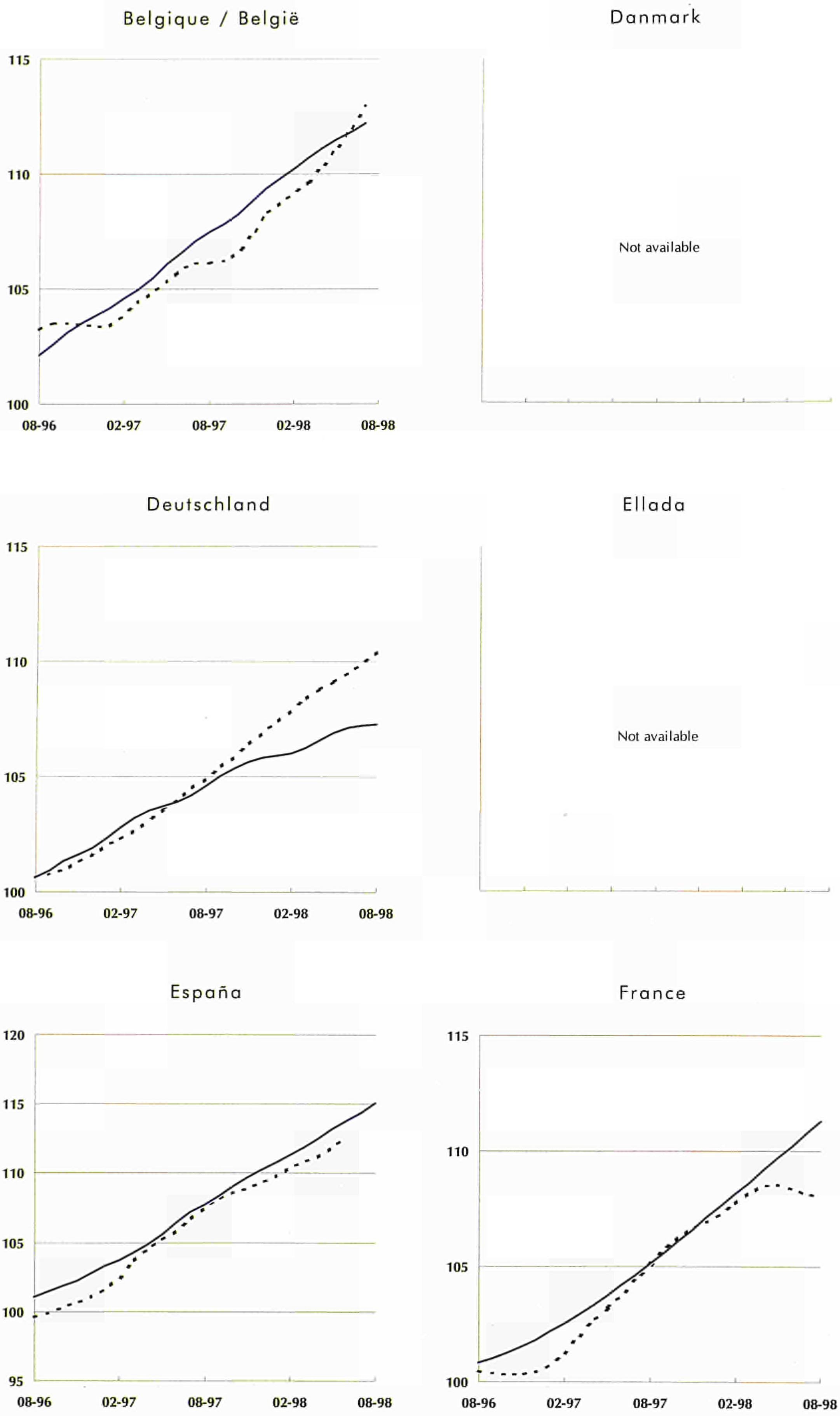
A multiple regression is run, using the growth rate of the industrial production lagged with values of the business opinion survey data. The result of this regression is "integrated" from a growth rate to an evolution, and after that the trend cycle is calculated for a clearer interpretation of the results.

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 89.

Figure 2.7

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



Production index -----
Expected output index ——

Source: eurostat

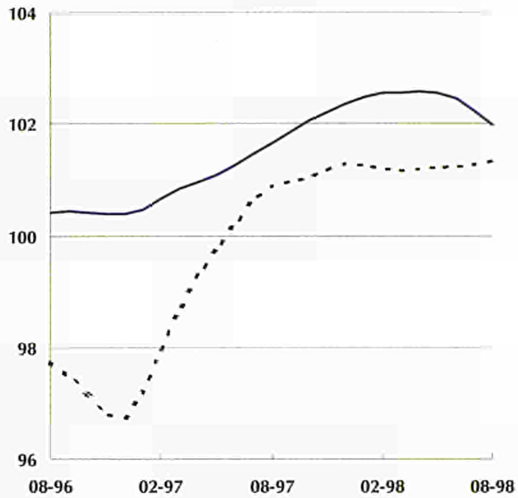
Production index (expected output index)

Figure 2.7

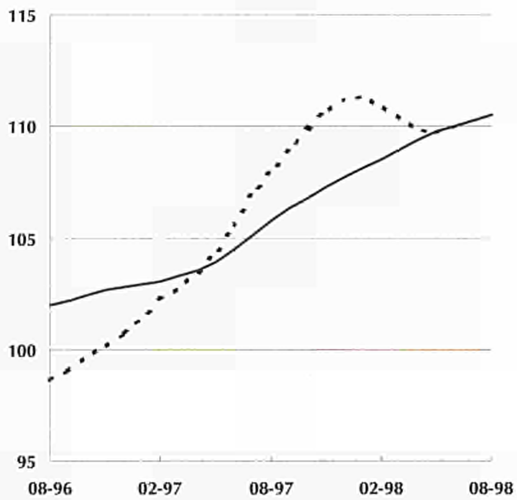
Expected output index for total industry: indices (1995 = 100)

Ireland

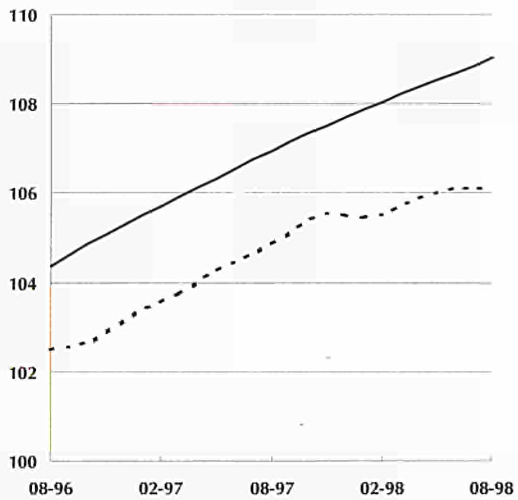
Italia



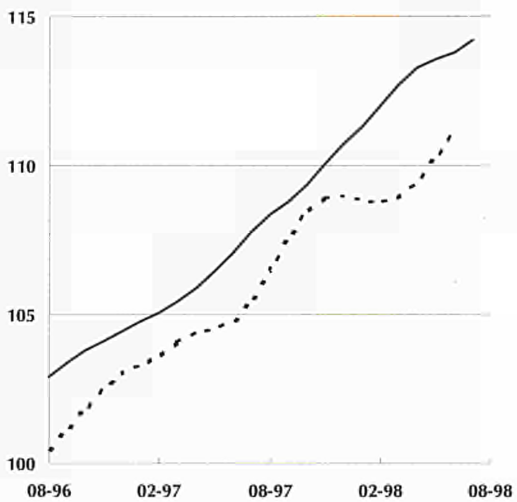
Luxembourg



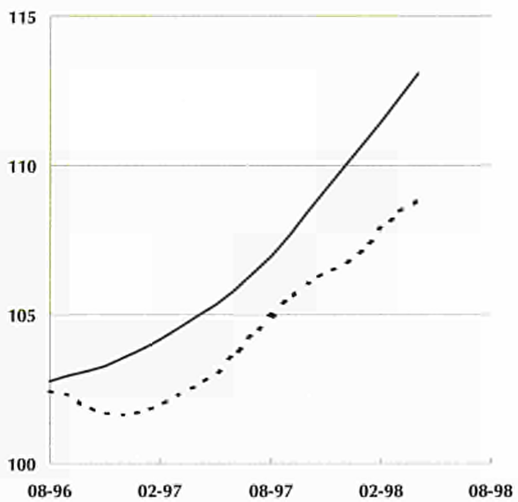
Nederland



Österreich



Portugal



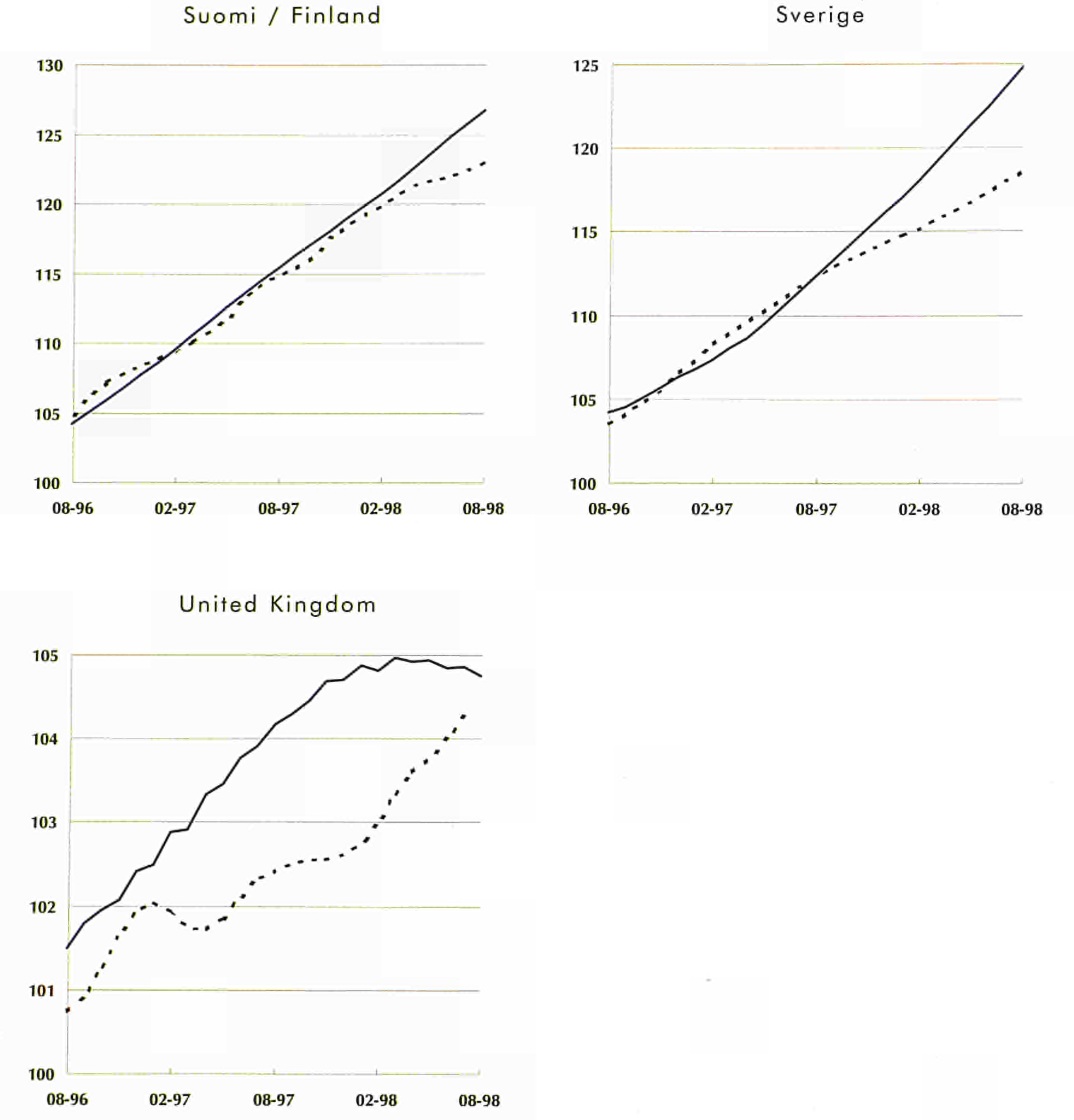
- - - - - Production index

——— Expected output index

Source: eurostat

Figure 2.7

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



Production index -----

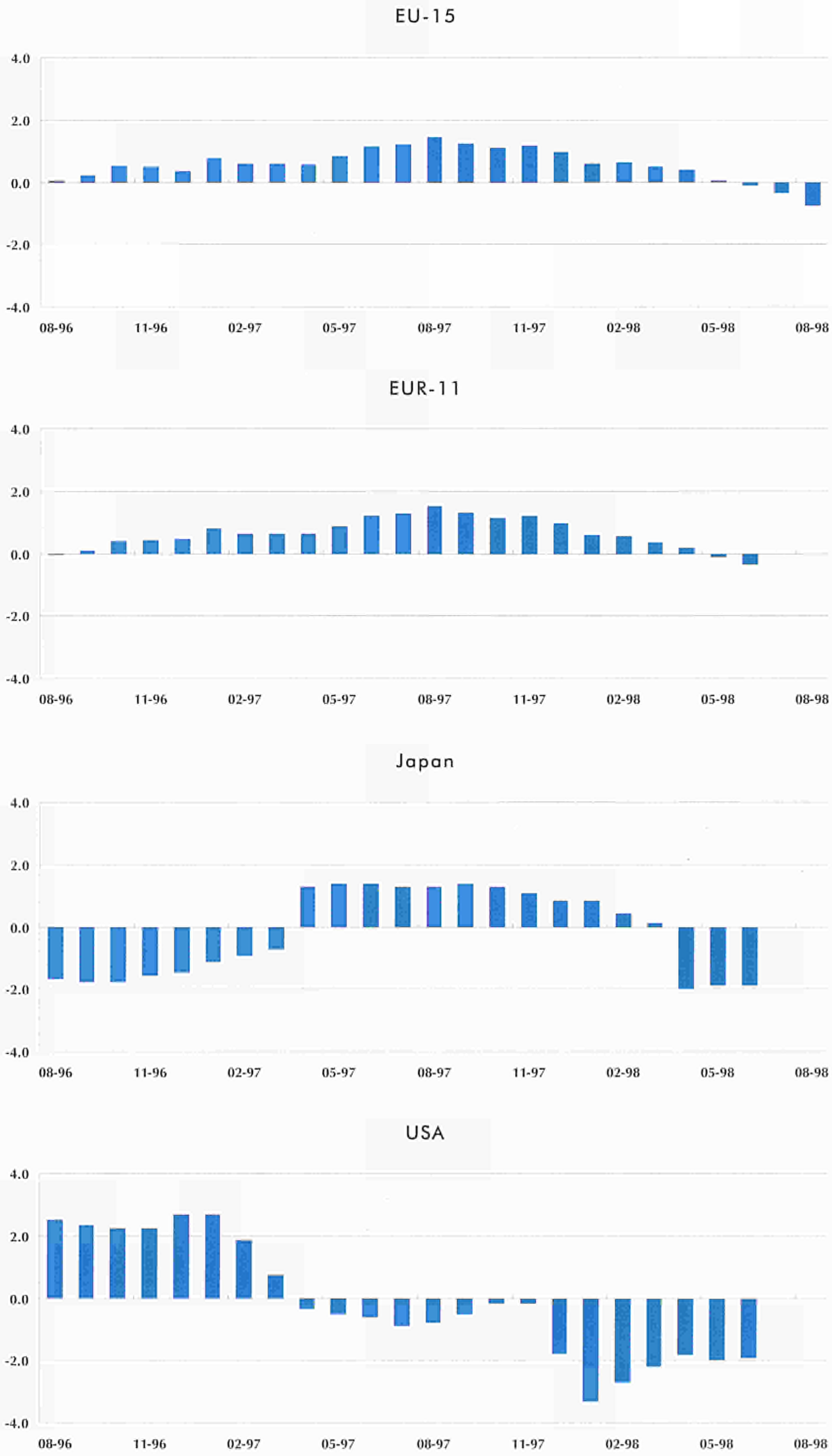
Expected output index ———

Source: eurostat

Domestic producer price index

Figure 2.8

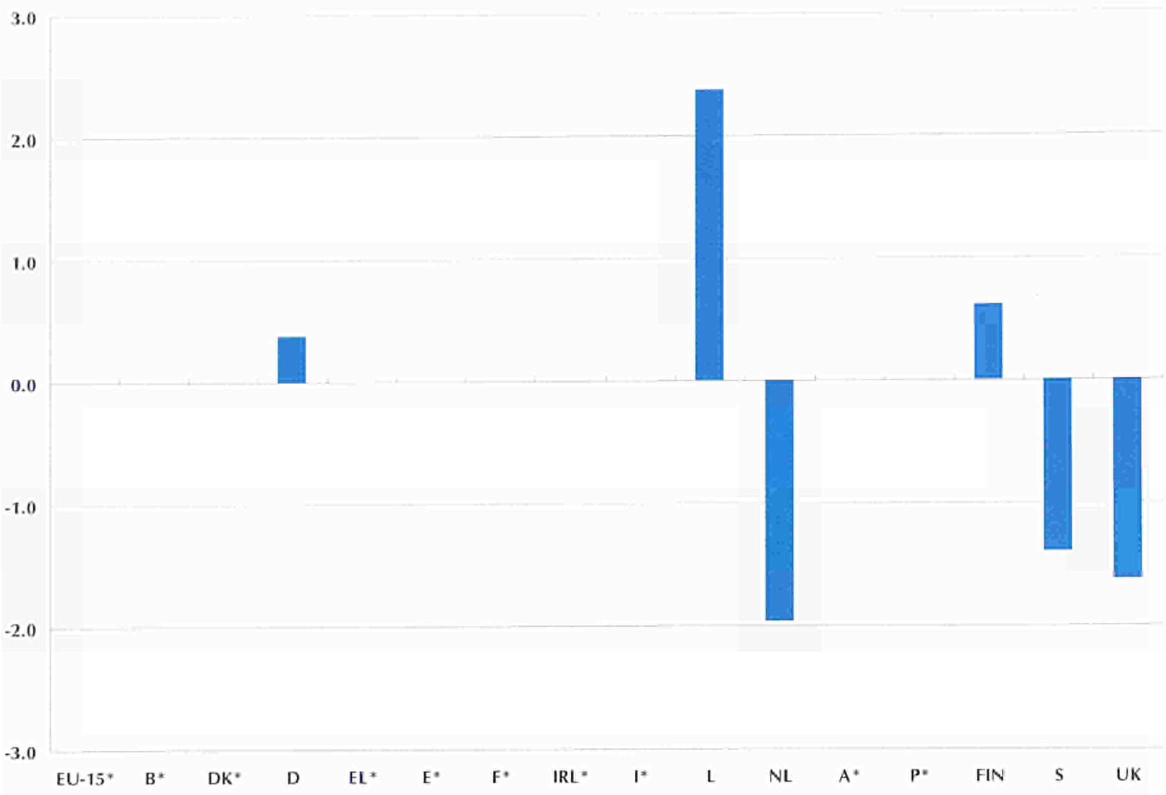
Domestic producer price index: growth rate, year on year (%)



Source: eurostat

Figure 2.9

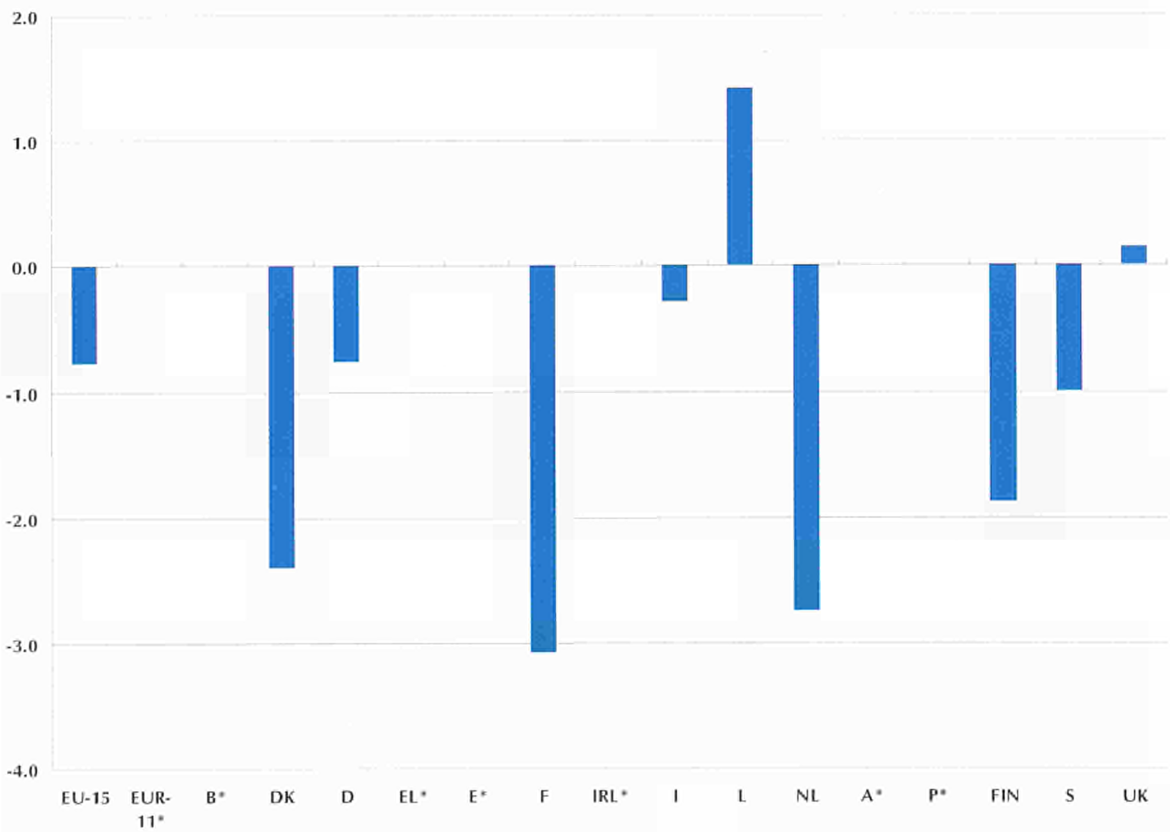
Export prices for manufacturing industry: growth rate, year on year, 06-98 (%)



Source: eurostat

Figure 2.10

Domestic producer price index: growth rate, year on year, 08-98 (%)



Source: eurostat

Domestic producer price index

Table 2.6

Domestic producer price index: indices (1995 = 100)

	1995	1996	1997	04-98	05-98	06-98	07-98	08-98	09-98
EU-15	100.0	100.6	101.6	101.6	101.5	101.3	101.2	101.0	:
B	100.0	100.6	102.3	102.3	102.3	101.8	:	:	:
DK	100.0	101.6	103.7	103.3	103.3	102.9	102.4	102.1	:
D	100.0	99.6	100.7	100.7	100.7	100.6	100.4	100.2	100.1
EL	100.0	107.4	111.0	114.6	114.9	114.8	:	:	:
E	100.0	101.7	102.7	102.5	102.4	102.2	:	:	:
F	100.0	100.5	100.7	99.5	99.1	98.5	98.3	97.8	97.8
IRL	100.0	101.8	101.9	:	:	:	:	:	:
I	100.0	101.9	103.2	103.8	103.6	103.5	103.4	103.1	103.0
L	100.0	99.6	101.4	103.7	103.6	103.8	103.8	103.6	:
NL	100.0	101.8	104.5	104.0	103.8	103.5	102.7	102.4	102.3
A	:	:	:	:	:	:	:	:	:
P	100.0	103.1	104.7	:	:	:	:	:	:
FIN	100.0	99.1	100.4	99.8	99.8	99.5	99.4	99.0	98.6
S	100.0	100.6	101.7	101.7	101.8	101.8	101.7	101.2	100.9
UK	100.0	100.6	100.3	100.2	100.0	99.9	99.5	99.4	99.5
Japan	100.0	98.2	98.9	97.8	97.7	97.6	:	:	:
USA	100.0	102.4	102.3	99.9	100.1	100.0	:	:	:

Source: eurostat

Table 2.7

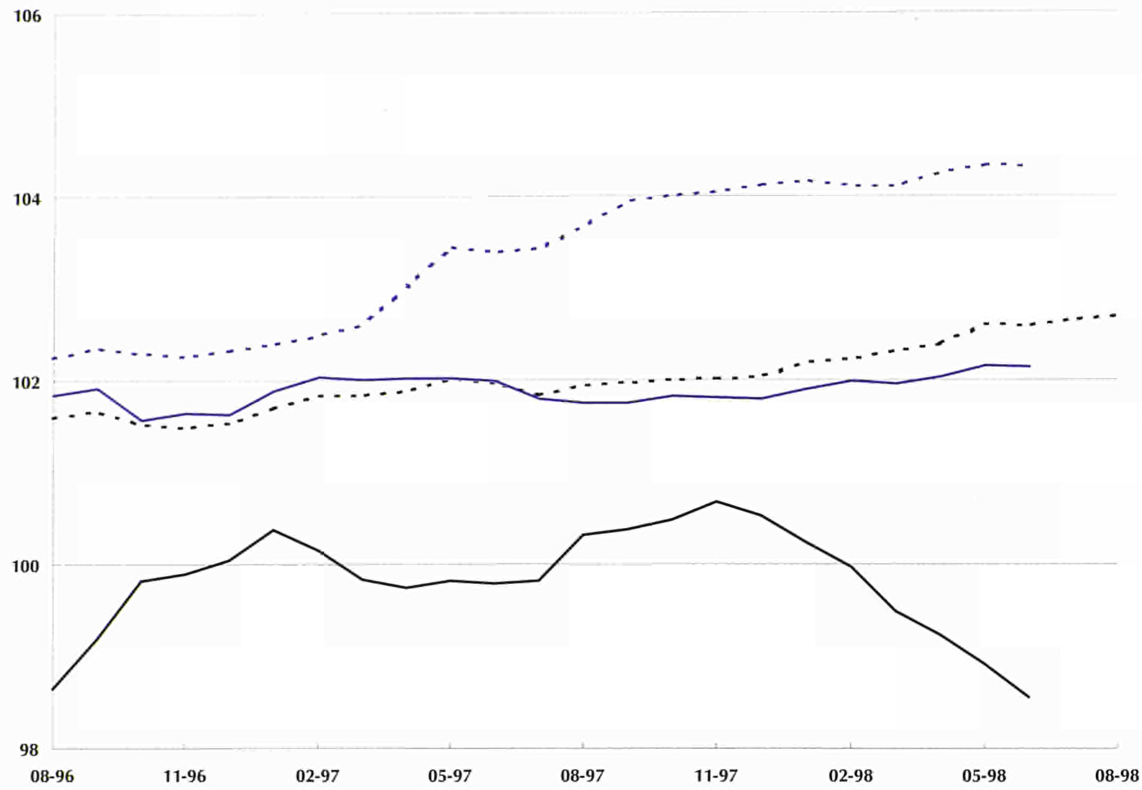
Domestic producer price index in ECU terms: indices (1995 = 100)

	1995	1996	1997	04-98	05-98	06-98	07-98	08-98	09-98
EU-15	100.0	102.2	104.8	105.1	104.8	104.7	104.4	104.1	:
B	100.0	98.7	97.3	96.5	97.1	96.4	:	:	:
DK	100.0	101.1	101.5	100.2	100.9	100.3	99.8	99.7	:
D	100.0	97.7	96.0	95.3	95.9	95.5	95.3	95.3	95.5
EL	100.0	106.6	108.8	100.7	102.3	103.9	:	:	:
E	100.0	103.1	100.9	99.3	99.8	99.4	:	:	:
F	100.0	100.9	99.4	97.9	97.9	97.1	96.9	96.6	96.9
IRL	100.0	104.7	111.2	:	:	:	:	:	:
I	100.0	110.8	113.9	113.0	113.6	113.3	113.2	112.9	113.0
L	100.0	97.7	96.5	97.9	98.3	98.3	98.3	98.3	:
NL	100.0	99.9	99.2	97.9	98.2	97.7	96.9	96.7	96.9
A	:	:	:	:	:	:	:	:	:
P	100.0	103.3	103.4	:	:	:	:	:	:
FIN	100.0	97.1	97.4	94.8	95.2	94.7	94.6	94.3	94.1
S	100.0	110.1	109.5	111.0	111.1	108.9	108.1	105.3	103.1
UK	100.0	102.5	120.1	127.2	122.3	124.1	123.5	122.1	120.0
Japan	100.0	87.1	88.5	83.0	79.9	77.4	:	:	:
USA	100.0	105.5	118.0	119.8	118.1	118.8	:	:	:

Source: eurostat

Figure 2.11

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



Source: eurostat

Table 2.8

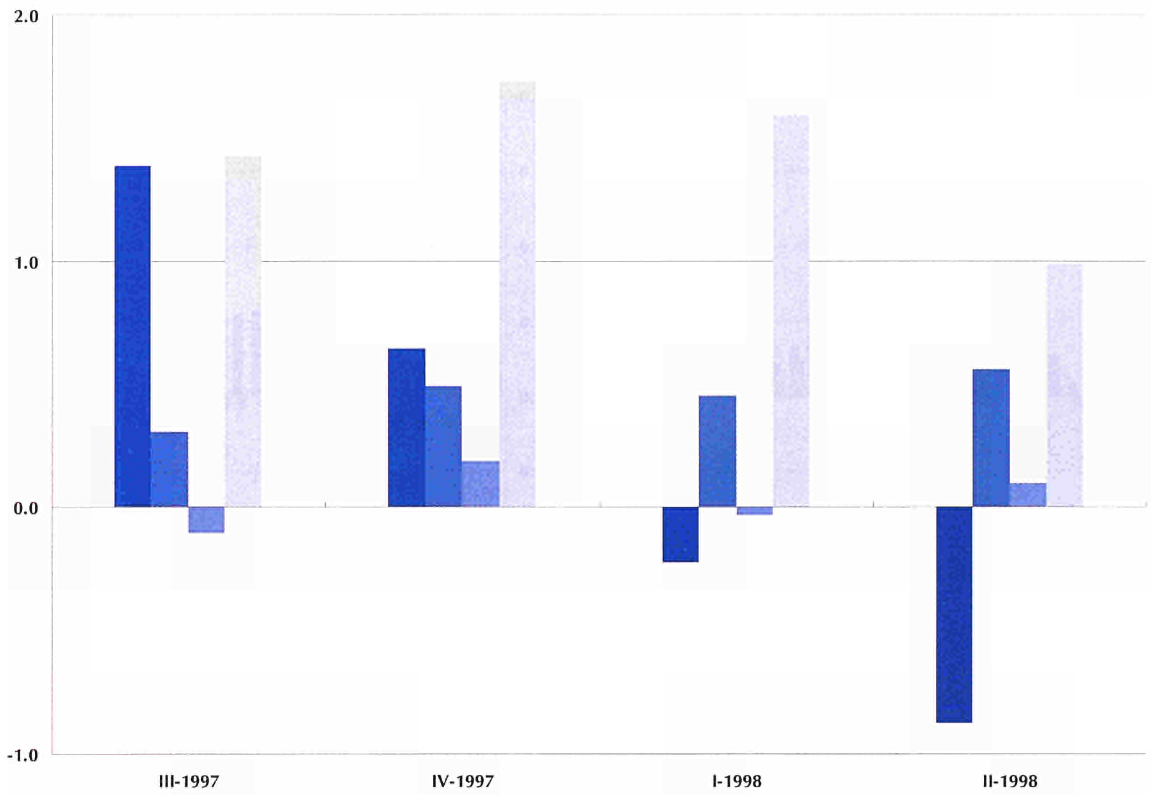
Domestic producer price index for the main industrial groupings: indices (1995 = 100)

	1995	1996	1997	03-98	04-98	05-98	06-98	07-98	08-98
Total industry									
EU-15	100.0	100.6	101.6	101.7	101.6	101.5	101.3	101.2	101.0
Japan	100.0	98.2	98.9	98.1	97.8	97.7	97.6	:	:
USA	100.0	102.4	102.3	99.8	99.9	100.1	100.0	:	:
Intermediate goods									
EU-15	100.0	99.4	100.2	99.5	99.2	98.9	98.5	:	:
Japan	:	:	:	:	:	:	:	:	:
USA	:	:	:	:	:	:	:	:	:
Capital goods									
EU-15	100.0	101.5	101.9	102.3	102.4	102.6	102.6	102.6	102.7
Japan	:	:	:	:	:	:	:	:	:
USA	:	:	:	:	:	:	:	:	:
Consumer durables									
EU-15	100.0	101.6	101.9	102.0	102.0	102.2	102.1	:	:
Japan	:	:	:	:	:	:	:	:	:
USA	:	:	:	:	:	:	:	:	:
Consumer non-durables									
EU-15	100.0	101.9	103.4	104.1	104.3	104.3	104.3	:	:
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 (%)

Source: eurostat

Table 2.9

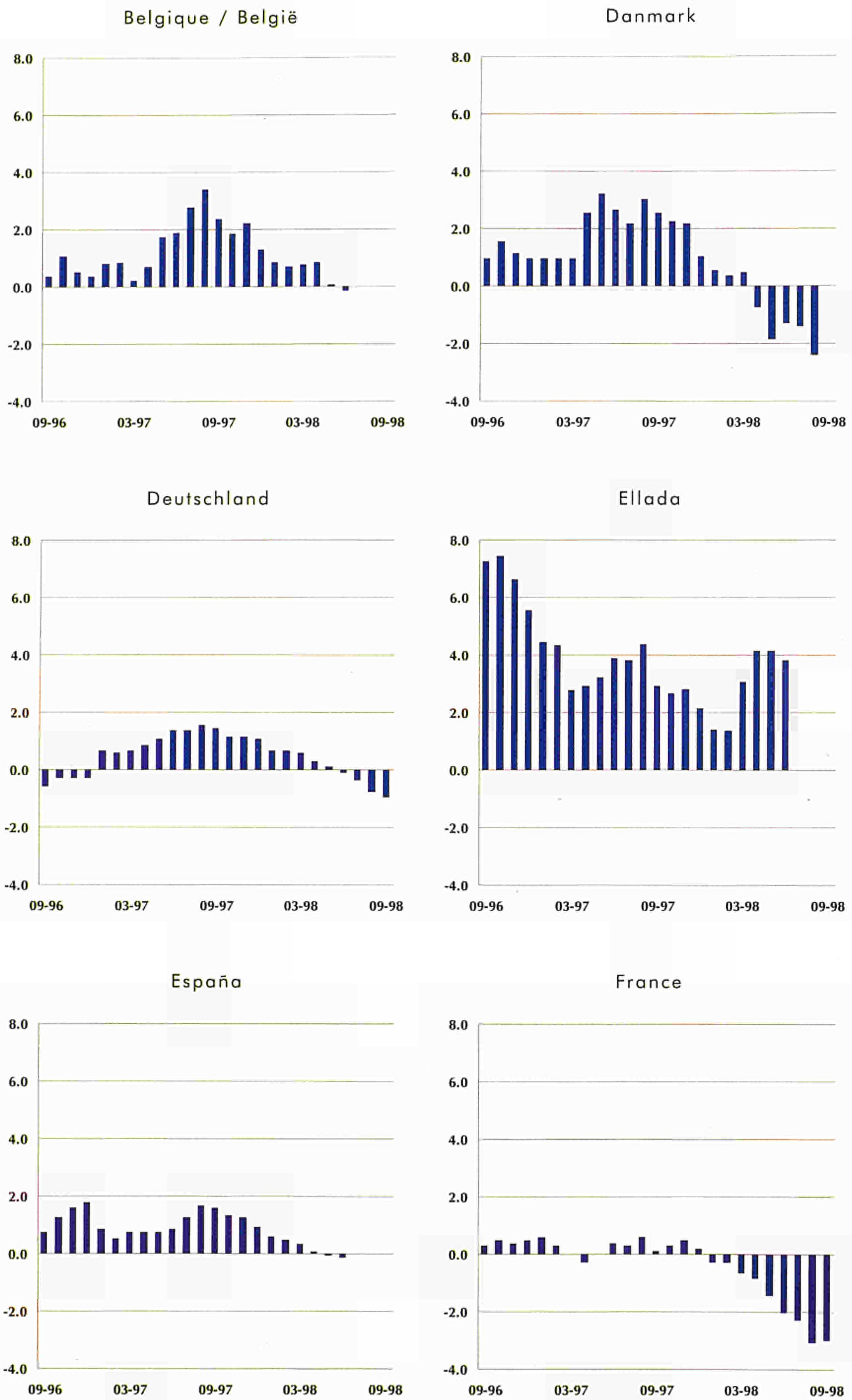
Domestic producer price index for the main industrial groupings: growth rate, year on year (%)

	Latest month available	Total industry	Intermediate goods	Capital goods	Consumer durables	Consumer non-durables
EU-15	08-98	-0.8	:	0.7	:	:
B	06-98	-0.1	0.8	0.1	:	2.6
DK	08-98	-2.4	-2.0	1.7	2.7	-5.0
D	09-98	-1.0	-2.4	0.7	0.4	0.3
EL	06-98	3.8	3.0	11.1	4.5	3.5
E	06-98	-0.2	-1.3	0.7	1.1	0.7
F	09-98	-3.0	-4.1	-1.9	-1.6	-0.2
IRL	01-98	0.0	:	:	:	0.5
I	09-98	-0.5	-2.4	2.1	:	1.2
L	08-98	1.4	1.8	3.0	-3.2	-1.8
NL	09-98	-2.7	-3.4	1.8	1.5	-3.0
A		:	:	:	:	:
P	12-97	0.5	-0.1	:	:	1.7
FIN	09-98	-2.5	:	-1.1	3.1	-0.8
S	09-98	-1.4	-8.0	2.0	1.5	-0.3
UK	09-98	-0.2	-3.3	-1.0	0.3	1.0
Japan	06-98	-1.9	:	:	:	:
USA	06-98	-1.9	:	:	:	:

Source: eurostat

Figure 2.13

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



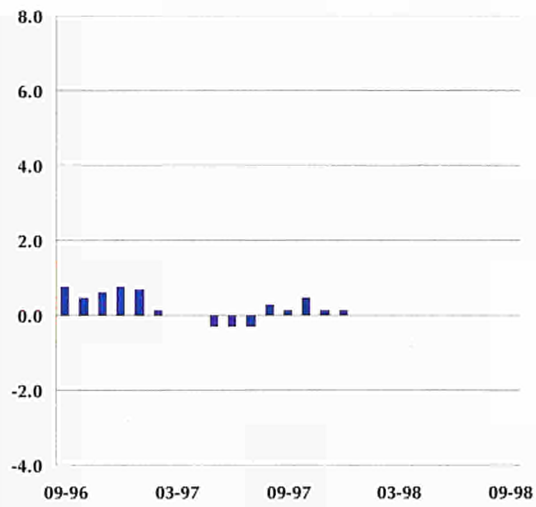
Source: eurostat

Domestic producer price index

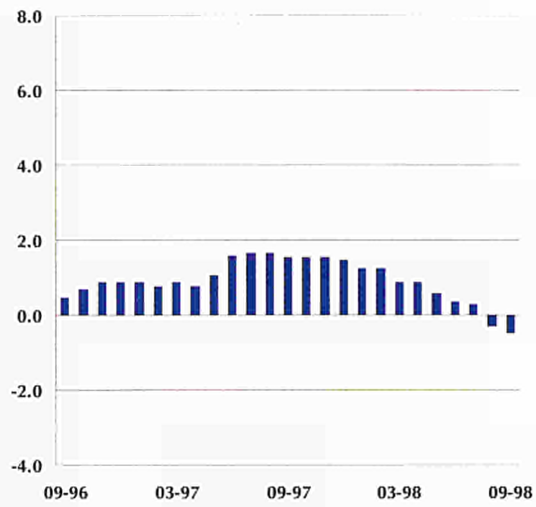
Figure 2.13

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

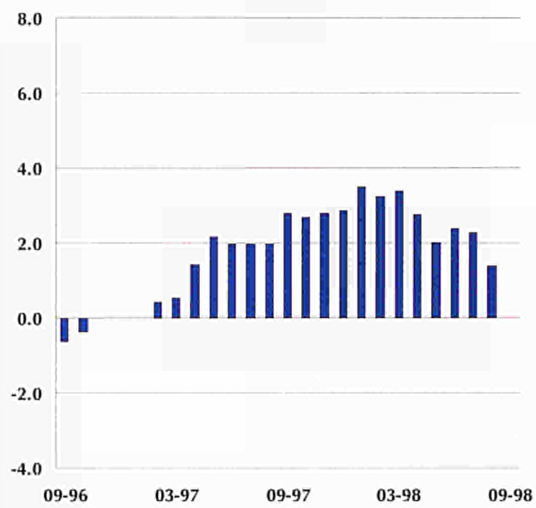
Ireland



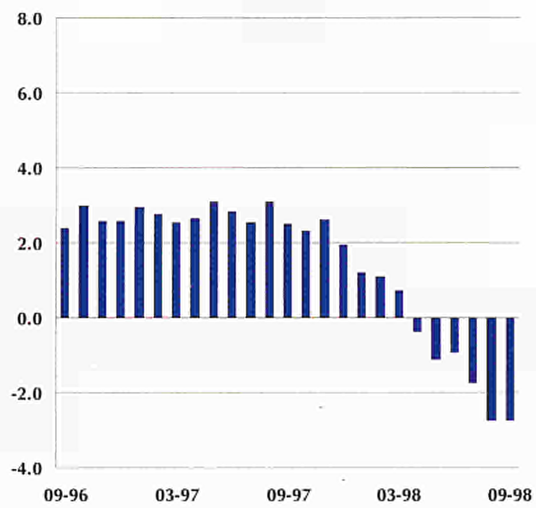
Italia



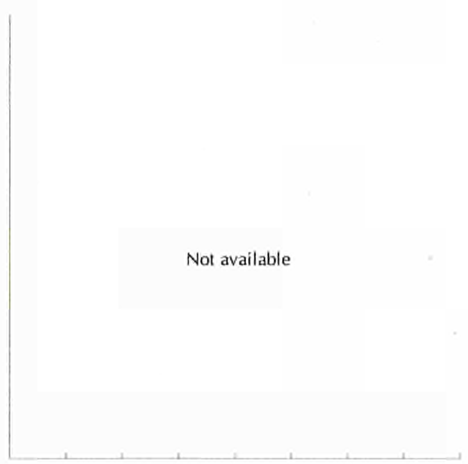
Luxembourg



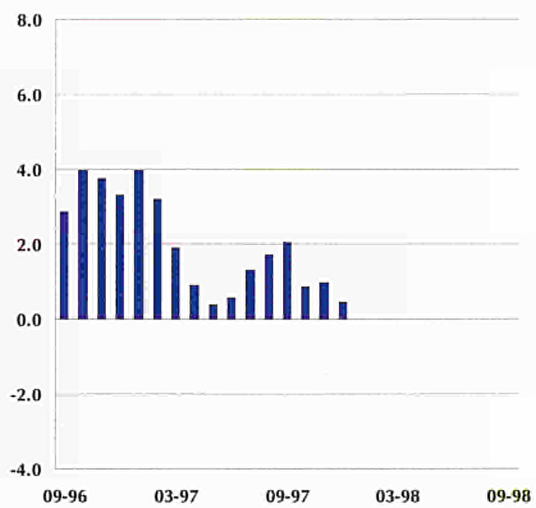
Nederland



Österreich



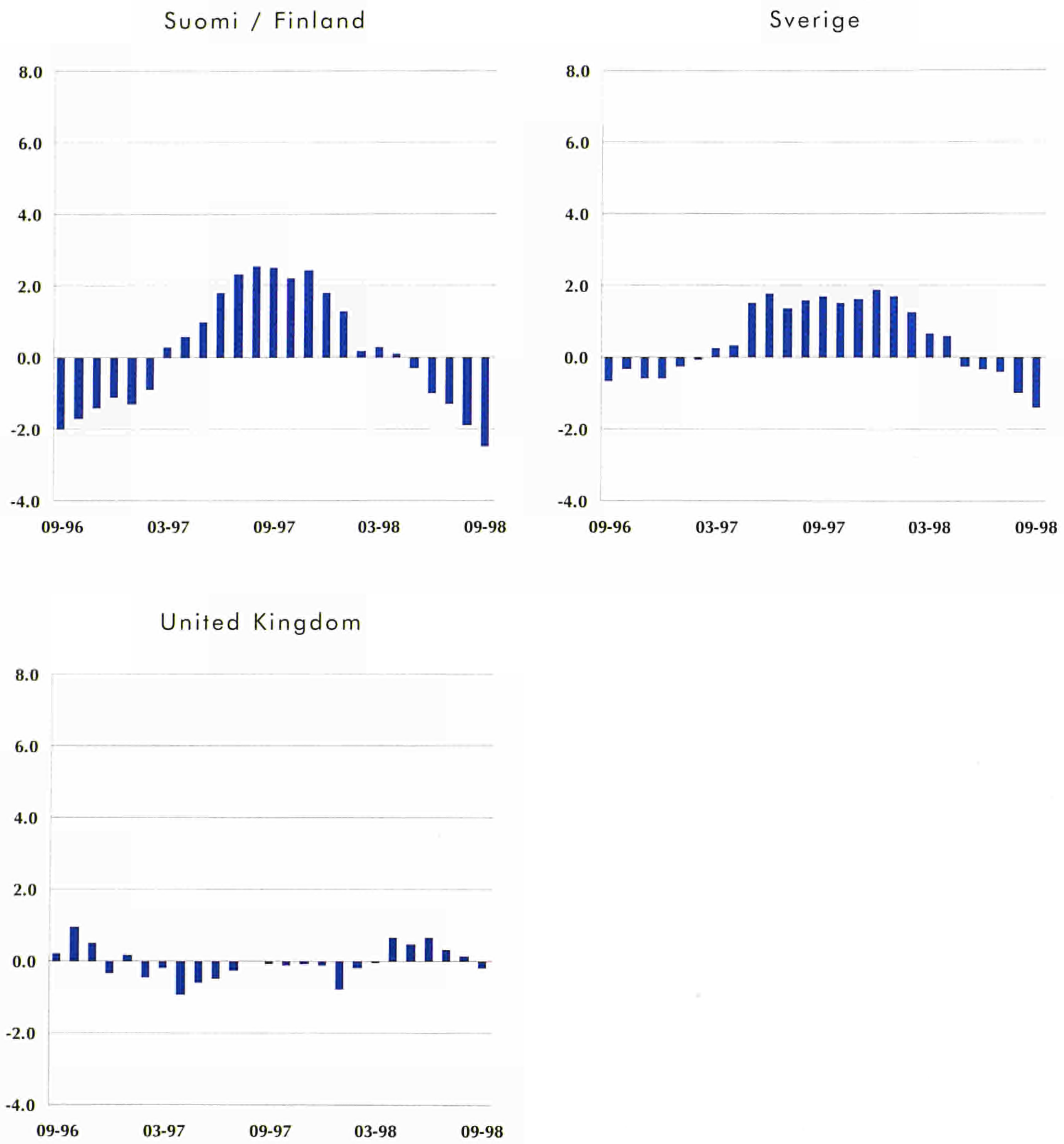
Portugal



Source: eurostat

Figure 2.13

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



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 89.

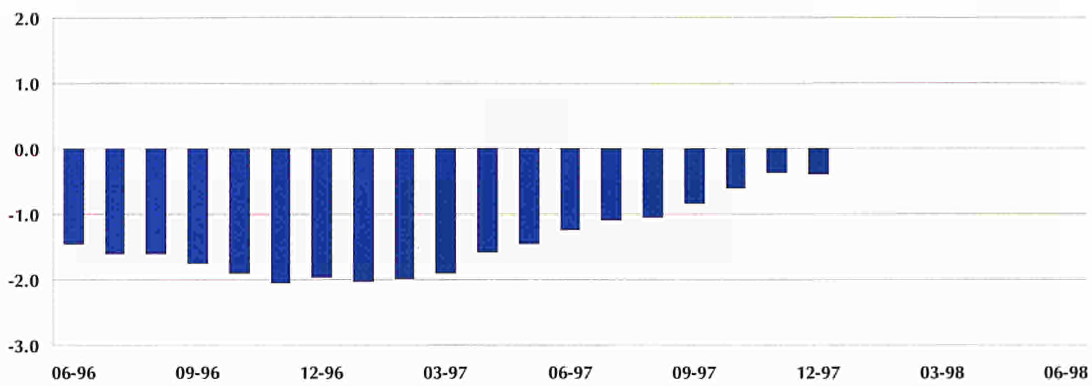
Source: eurostat

Employment index

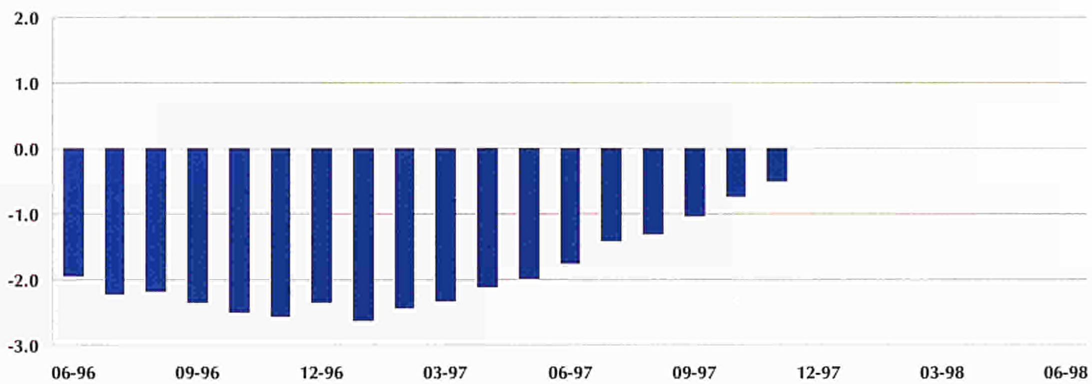
Figure 2.14

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

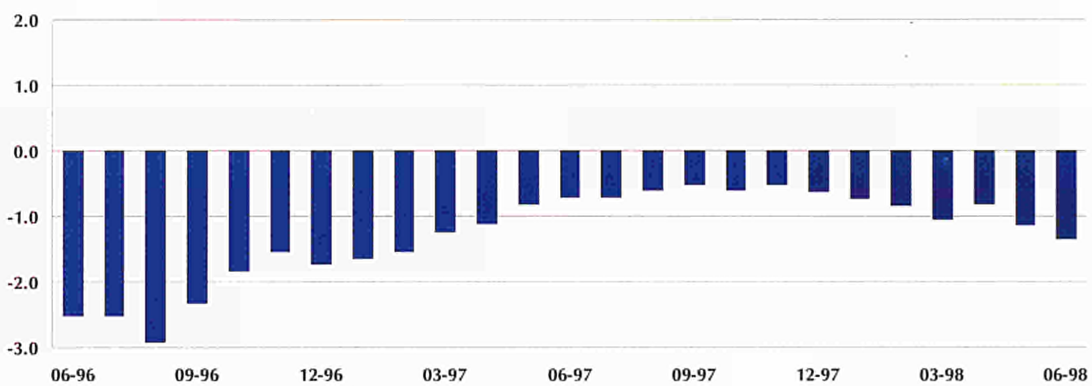
EU-15



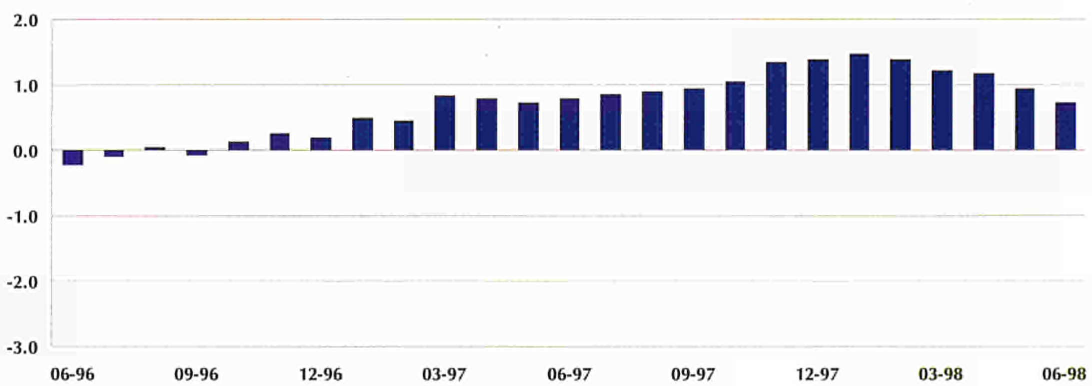
EUR-11



Japan



USA



Source: eurostat

Figure 2.15

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

Intermediate goods
Capital goods
Consumer durables
Consumer non-durables

Source: eurostat

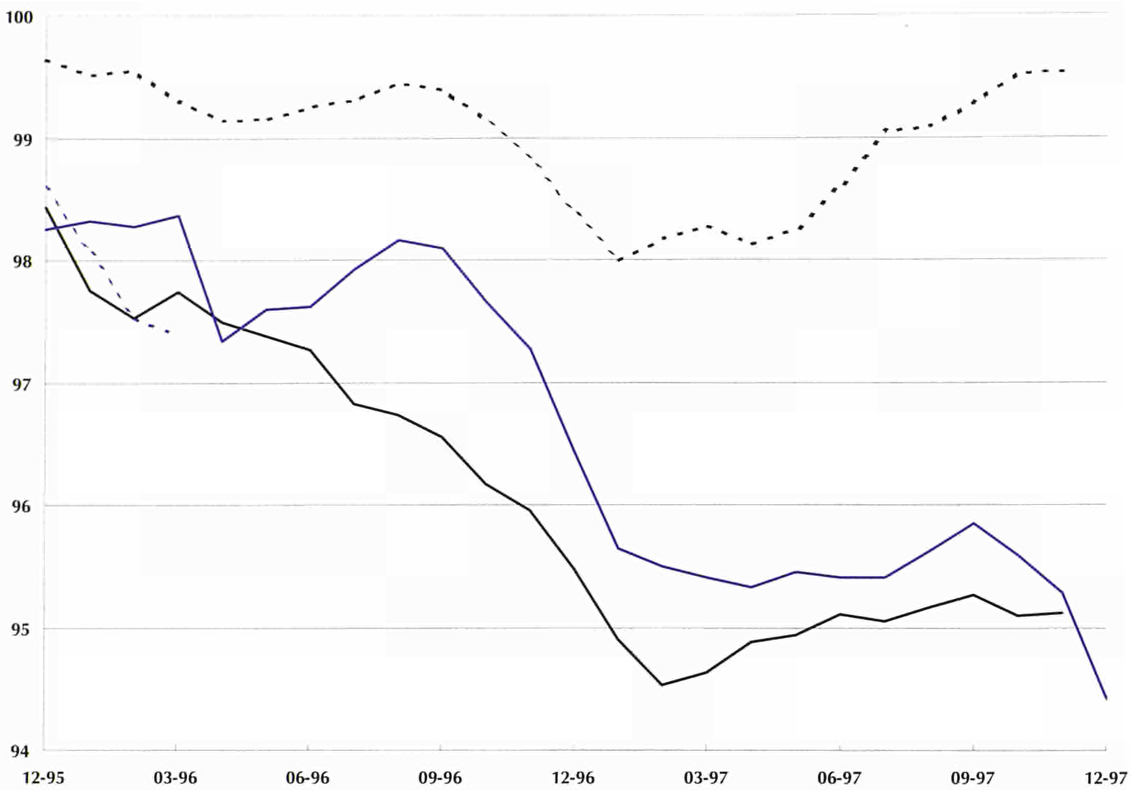


Table 2.10

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

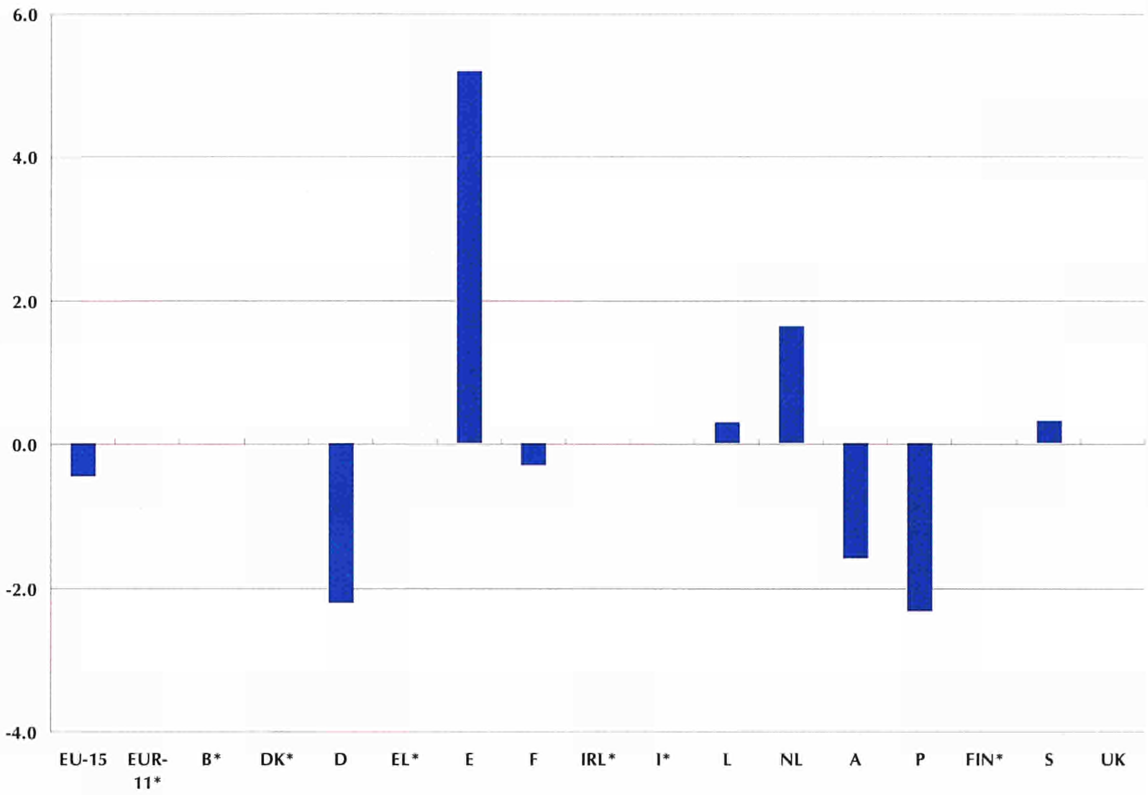
	Latest 3 months available			Total industry	Intermediate goods	Capital goods	Consumer durables	Consumer non-durables
EU-15	10-97	⇨	12-97	0.0	:	:	:	:
B	03-98	⇨	05-98	:	:	:	-0.7	0.3
DK	10-93	⇨	12-93	0.2	0.6	-0.3	:	0.0
D	10-97	⇨	12-97	-0.3	-0.6	-0.3	-0.7	-0.9
EL	04-97	⇨	06-97	0.0	-0.1	-4.5	0.9	-1.2
E	01-98	⇨	03-98	-0.6	-0.2	0.8	-0.5	-0.1
F	01-98	⇨	03-98	0.2	0.0	0.4	-0.1	0.3
IRL	01-97	⇨	03-97	1.8	1.3	3.4	:	:
I	04-97	⇨	06-97	-0.5	:	0.3	-0.7	-0.7
L	04-98	⇨	06-98	0.3	0.3	2.6	1.3	-0.7
NL	04-98	⇨	06-98	0.3	:	:	:	:
A	04-98	⇨	06-98	1.2	0.9	2.1	-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	04-98	⇨	06-98	0.7	:	:	:	:
UK	01-98	⇨	03-98	0.2	0.5	0.0	0.1	0.1
Japan	04-98	⇨	06-98	-0.4	:	:	:	:
USA	04-98	⇨	06-98	-0.1	:	:	:	:

Source: eurostat

eurostat

Employment index

Figure 2.16



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

Source: eurostat

Table 2.11

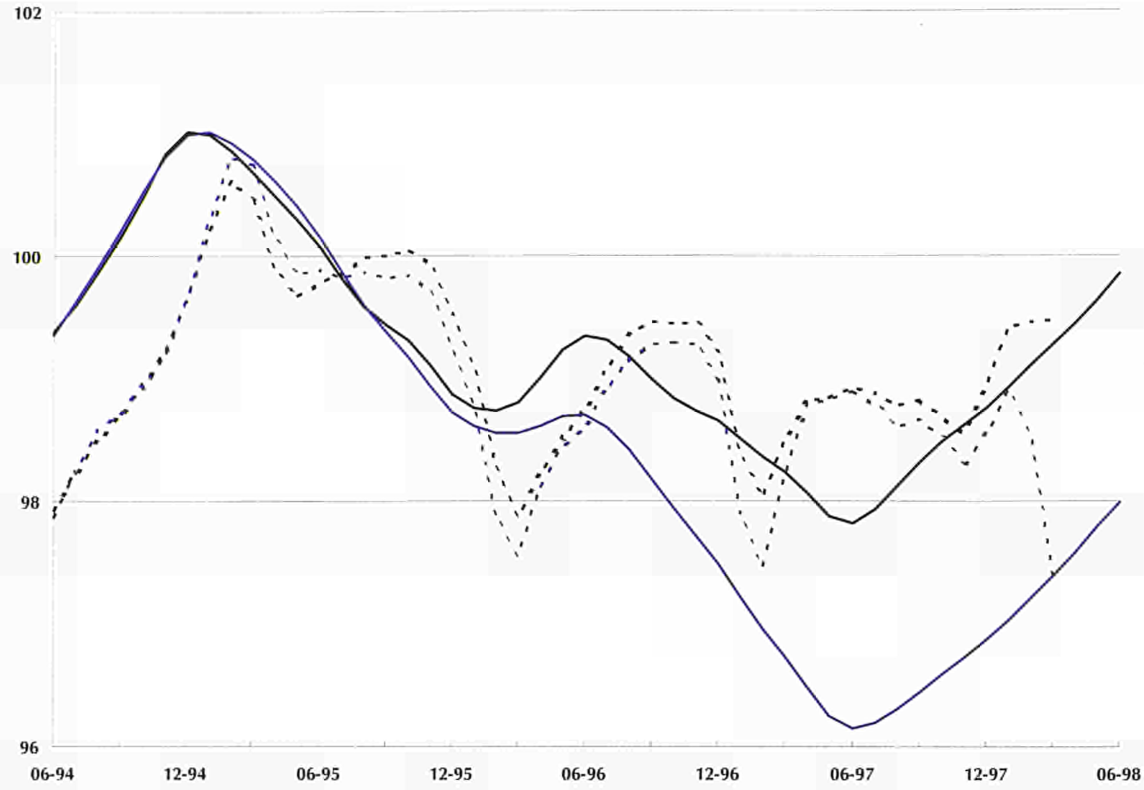
	Latest 3 months available			Total industry	Intermediate goods	Capital goods	Consumer durables	Consumer non-durables
EU-15	10-97	⇨	12-97	-0.5	:	:	-2.1	:
B	03-98	⇨	05-98	:	:	:	-1.9	-0.7
DK	04-98	⇨	06-98	:	:	-2.1	-1.1	-5.4
D	10-97	⇨	12-97	-2.2	-2.8	-2.1	-4.1	-4.2
EL	04-97	⇨	06-97	-2.7	-1.6	-2.3	0.5	-6.1
E	01-98	⇨	03-98	5.0	6.6	10.1	1.2	1.0
F	01-98	⇨	03-98	0.1	0.2	0.3	-2.2	0.4
IRL	01-97	⇨	03-97	4.3	5.1	5.0	:	:
I	04-97	⇨	06-97	-2.4	:	-1.7	-4.1	-4.1
L	06-98	⇨	08-98	1.1	-0.4	8.5	7.0	-1.5
NL	04-98	⇨	06-98	1.4	0.5	2.2	1.5	1.5
A	05-98	⇨	07-98	2.0	2.3	4.2	0.3	0.1
P	06-98	⇨	08-98	22.1	27.1	31.7	16.2	15.8
FIN		⇨		:	:	:	:	:
S	04-98	⇨	06-98	1.2	:	:	:	:
UK	01-98	⇨	03-98	0.2	-0.7	1.3	1.0	-0.4
Japan	04-98	⇨	06-98	-1.1	:	:	:	:
USA	04-98	⇨	06-98	0.9	:	:	:	:

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

Source: eurostat

Figure 2.17

Production and employment trends in construction: indices (1995 = 100)

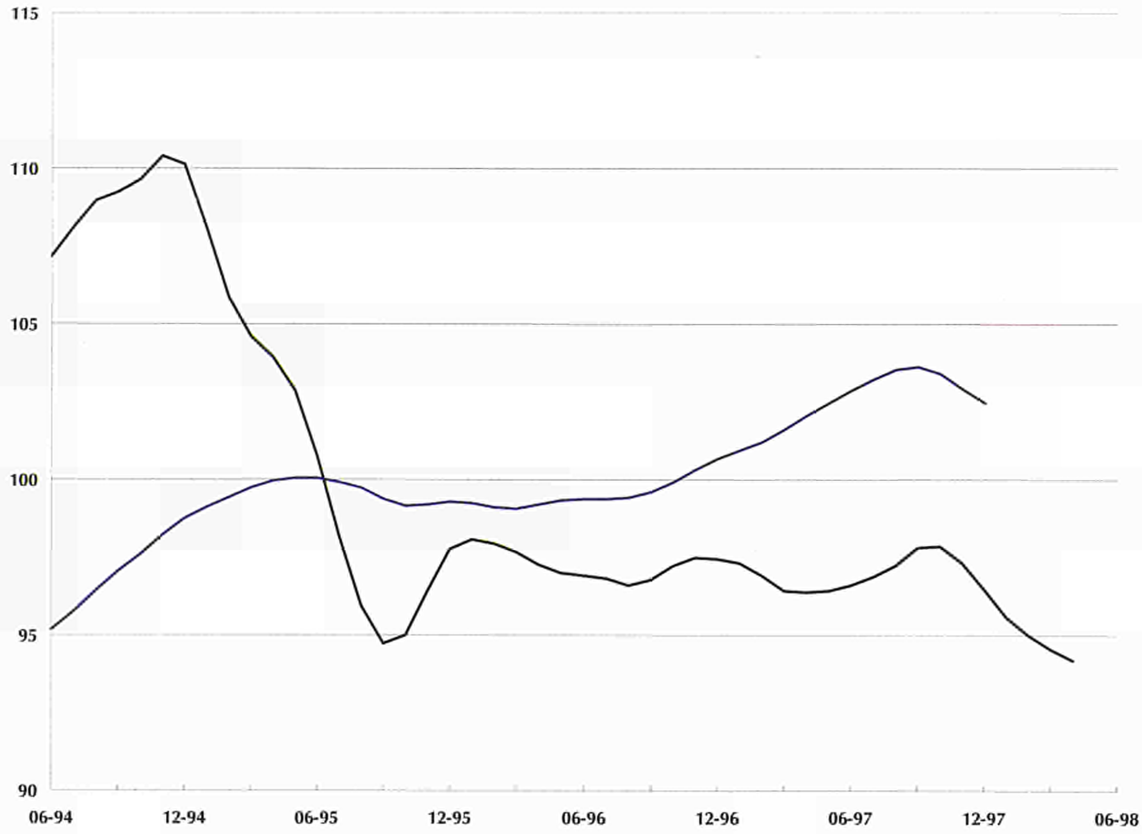


EU-15 construction: production index
EU-15 construction: employment index
EUR-11 construction: production index
EUR-11 construction: employment index

Source: eurostat

Figure 2.18

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



Residential
Non-residential

Source: eurostat

Production index (working day adjusted & trend cycle)

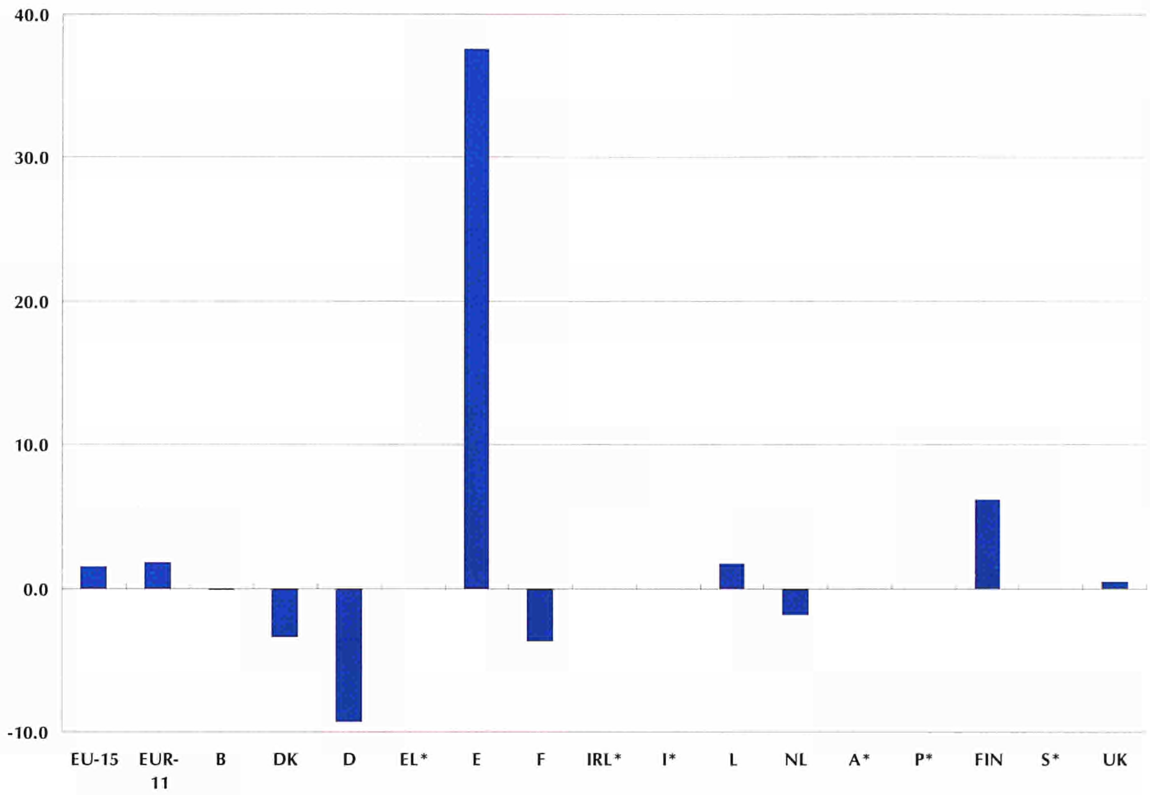


Figure 2.19

Production index for construction: growth rate, three months compared to the same three months of the previous year, 04-98 to 06-98 (%)

Source: eurostat

Table 2.12

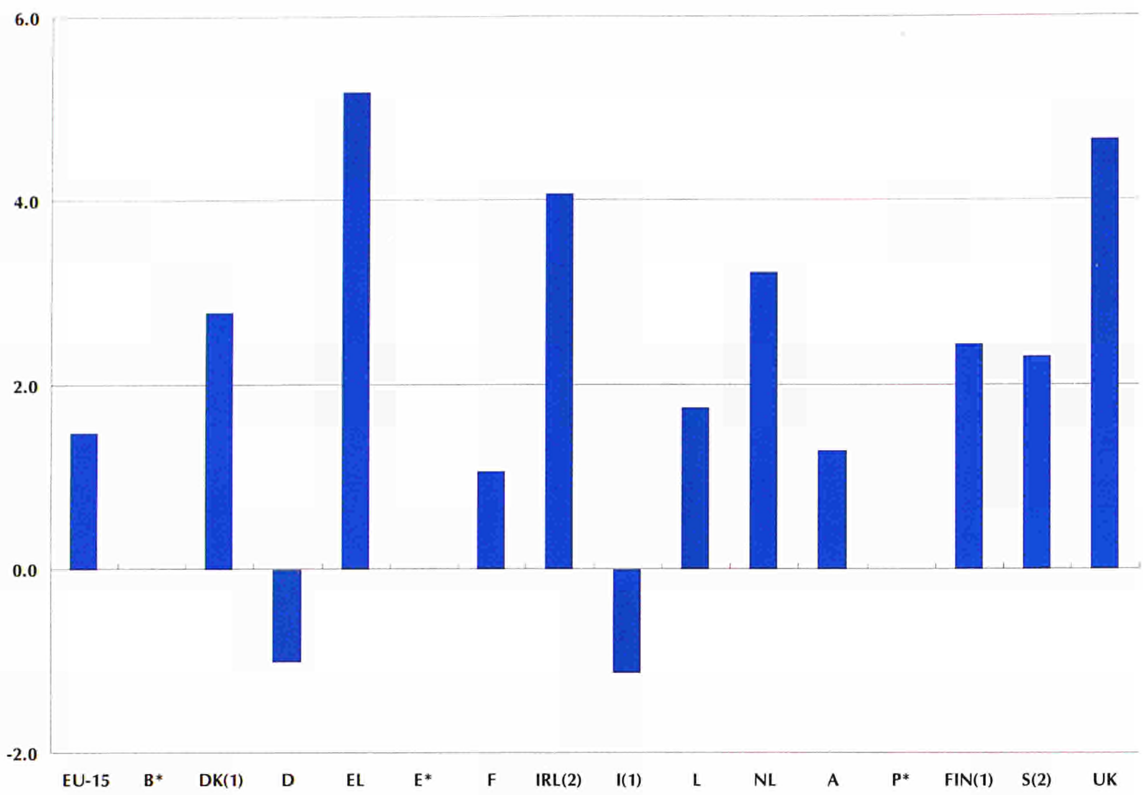
Production index of building and civil engineering: growth rates (%)

	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	01-98	⇨	03-98	0.0	2.4	10-97	⇨	12-97	0.0	:
B		⇨		:	:		⇨		:	:
DK	06-98	⇨	08-98	-4.3	-8.8	06-98	⇨	08-98	-5.0	-3.3
D	06-98	⇨	08-98	-1.7	-8.8	06-98	⇨	08-98	-1.3	-6.2
EL		⇨		:	:		⇨		:	:
E	04-98	⇨	06-98	1.9	4.5	04-98	⇨	06-98	1.7	7.9
F	06-98	⇨	08-98	-1.3	-3.2	06-98	⇨	08-98	-0.7	-0.2
IRL		⇨		:	:		⇨		:	:
I	01-98	⇨	03-98	-4.8	-5.4	10-97	⇨	12-97	1.2	9.0
L	06-98	⇨	08-98	:	4.2	06-98	⇨	08-98	:	-0.7
NL	01-98	⇨	03-98	8.3	15.8		⇨		:	:
A	03-98	⇨	05-98	-4.6	5.5	03-98	⇨	05-98	-0.4	9.3
P		⇨		:	:		⇨		:	:
FIN	04-98	⇨	06-98	-0.7	7.0	04-98	⇨	06-98	0.1	4.5
S		⇨		:	:		⇨		:	:
UK	04-98	⇨	06-98	-2.7	1.7	10-97	⇨	12-97	-3.8	-27.0

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, 01-98 to 03-98 (%)



1) Input prices.
2) Input prices and one-dwelling buildings.

Source: eurostat

Table 2.13

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

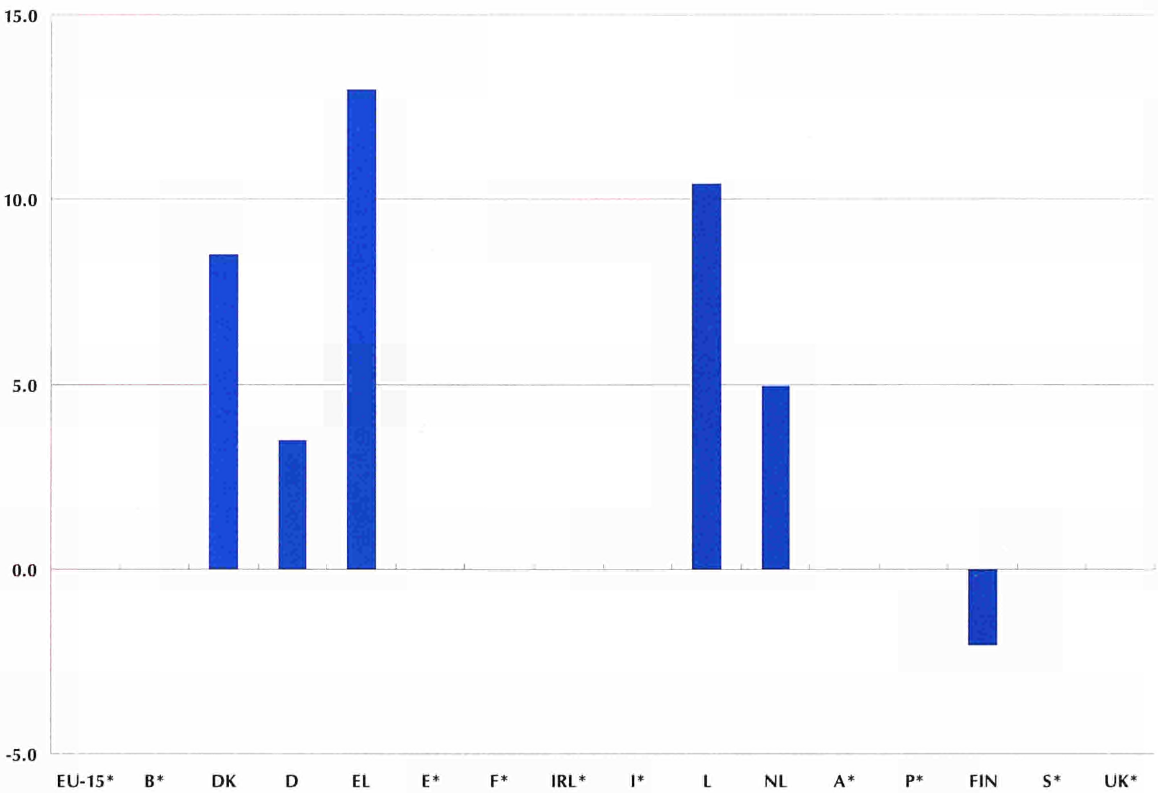
	IV-1996	I-1997	II-1997	III-1997	IV-1997	I-1998	II-1998	III-1998
EU-15	102.3	103.2	103.6	104.9	105.1	104.7	:	:
B	:	:	:	:	:	:	:	:
DK (1)	104.2	104.9	105.6	106.4	107.1	107.8	107.8	109.3
D	99.5	99.3	99.1	99.1	98.7	98.3	98.1	:
EL	107.4	110.1	110.7	111.9	113.2	115.8	117.2	:
E	:	:	:	:	:	:	:	:
F	102.8	102.9	104.2	104.8	104.9	104.0	:	:
IRL (2)	102.2	103.3	104.5	105.6	106.7	107.5	108.3	:
I (1)	103.1	103.3	103.5	105.0	105.3	102.1	102.6	:
L	101.0	102.1	102.1	102.7	102.7	103.9	103.9	:
NL	103.0	104.6	105.5	106.3	108.0	108.0	108.9	:
A	101.7	102.4	102.8	103.1	103.1	103.7	104.0	:
P	:	:	:	:	:	:	:	:
FIN (1)	100.3	101.4	102.5	103.7	103.7	103.9	104.6	105.1
S (2)	103.8	104.8	105.5	106.3	106.9	107.2	108.6	:
UK	103.4	105.4	106.4	107.4	109.3	110.3	:	:

1) Input prices.
2) 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, 03-98 to 05-98 (%)

Source: eurostat

Table 2.14

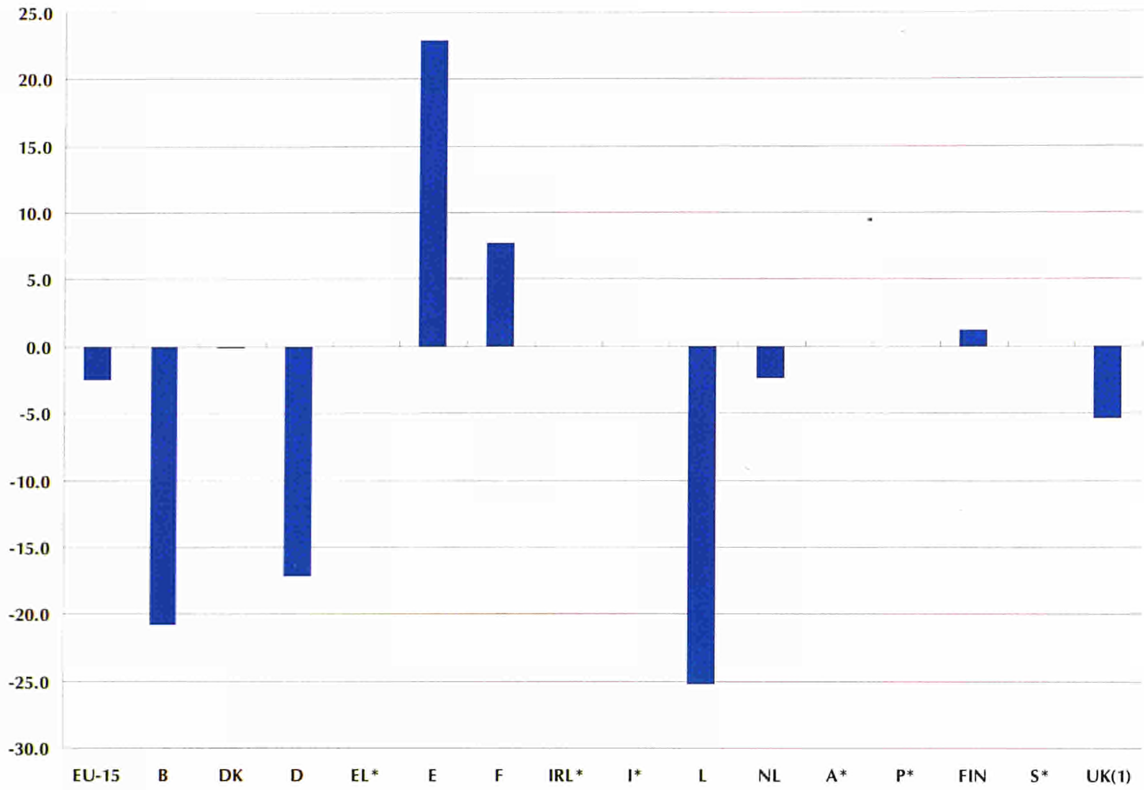
	Latest 3 months available			Residential '000m²	1995=100	Latest 3 months available			Non-residential '000m²	1995=100
EU-15		⇨		:	:	10-97	⇨	12-97	:	102.4
B	03-98	⇨	05-98	2,049	92.8		⇨		:	:
DK	06-98	⇨	08-98	658	172.0	06-98	⇨	08-98	1,395	131.7
D	04-98	⇨	06-98	13,806	100.1	04-98	⇨	06-98	11,228	104.2
EL	03-97	⇨	05-97	2,756	130.2	03-97	⇨	05-97	1,091	111.9
E	02-98	⇨	04-98	13,375	118.9	02-98	⇨	04-98	2,844	139.3
F		⇨		:	:	10-97	⇨	12-97	8,674	99.1
IRL	04-98	⇨	06-98	1,517	161.3	04-98	⇨	06-98	775	119.1
I	10-97	⇨	12-97	2,828	75.1	10-97	⇨	12-97	3,900	67.1
L	07-98	⇨	09-98	:	215.7	07-98	⇨	09-98	:	167.7
NL	06-98	⇨	08-98	3,492	88.5	06-98	⇨	08-98	5,954	168.3
A		⇨		:	:		⇨		:	:
P		⇨		:	:		⇨		:	:
FIN	06-98	⇨	08-98	937	200.7	06-98	⇨	08-98	1,017	164.1
S	06-98	⇨	08-98	248	:	06-98	⇨	08-98	482	:
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, 02-98 to 04-98 (%)



1) Buildings starts.

Source: eurostat

Table 2.15

Number of dwellings authorised (units)

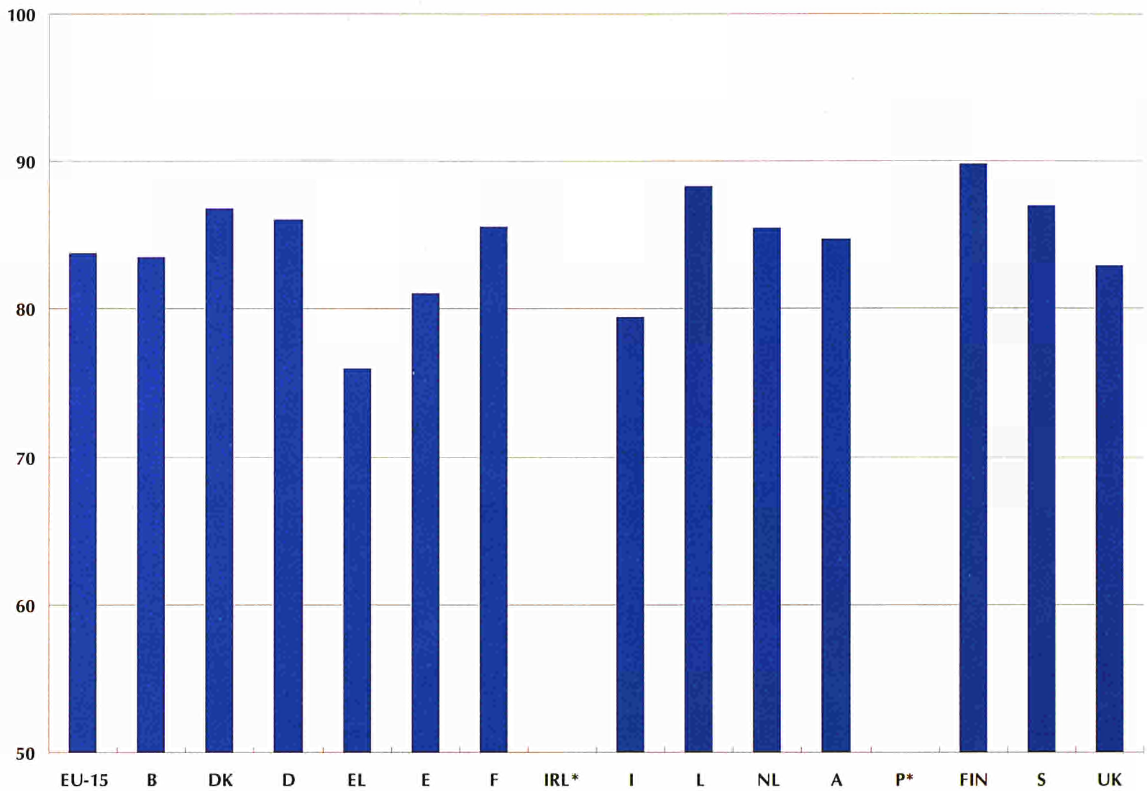
	Latest year available	no. of dwellings	Latest month available	no. of dwellings	no. of dwellings per 1,000 inhabitants	Index, 1995 = 100
EU-15		:	04-98	:	:	92.9
B	1997	50,847	05-98	3,518	:	93.9
DK	1997	**16,711**	08-98	**1,376**	**:**	**142.9**
D	1997	530,263	06-98	46,075	:	86.5
EL	1996	86,741	05-97	7,527	0.72	127.5
E	1997	304,763	04-98	25,845	:	109.8
F	1997	299,845	08-98	27,447	:	106.8
IRL (1)	1997	37,060	06-98	:	:	154.7
I	1997	**145,435**	12-97	**9,700**	**0.17**	**67.0**
L	1997	3,411	09-98	144	:	64.6
NL	1997	101,501	08-98	5,357	:	65.3
A		:		:	:	:
P	1997	94,786	12-97	8,667	0.87	135.2
FIN	1997	31,117	08-98	2,986	:	190.2
S	1997	11,756	08-98	678	:	:
UK (2)	1997	188,900	07-98	17,100	:	122.4

1) Quarterly data.
2) Buildings starts.

Source: eurostat

Capacity utilisation rates

Figure 2.23



Capacity utilisation rates: 07-98 (%)

Source: DG II, Business Survey

Table 2.16

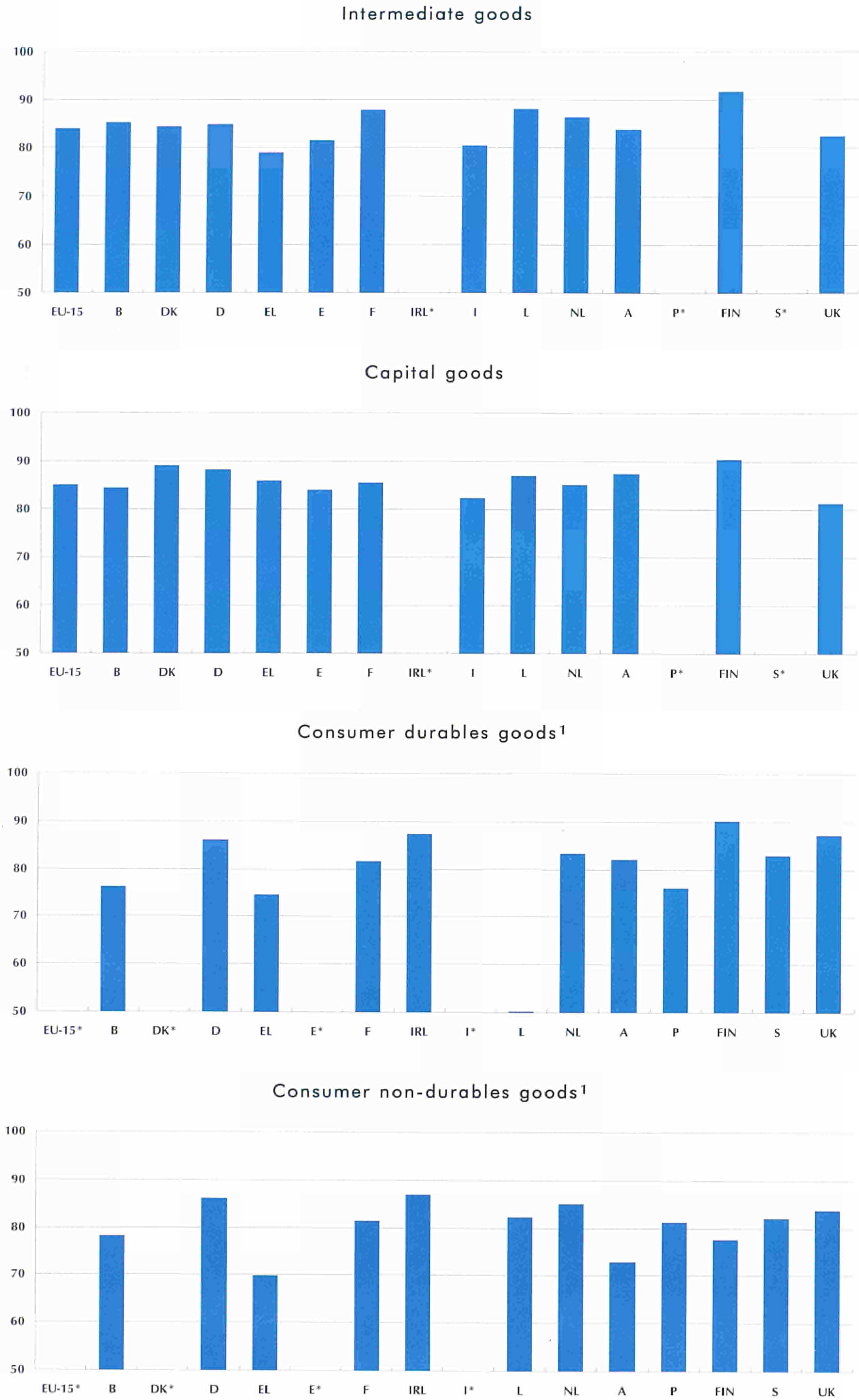
Capacity utilisation rates (%)

Growth rate: latest month, t / t-12 (%)		10-97	01-98	04-98	07-98
EU-15	1.6	83.2	83.2	83.3	83.8
B	1.3	83.2	81.9	82.6	83.5
DK	2.1	84.0	85.4	83.9	86.8
D	2.3	84.9	84.7	85.3	86.1
EL	-0.4	74.3	75.0	77.0	76.0
E	2.8	80.5	79.4	80.0	81.1
F	2.1	84.8	84.0	85.2	85.6
IRL	-0.4	74.2	76.6	:	:
I	2.3	77.7	79.0	78.2	79.5
L	4.5	84.8	87.5	87.9	88.3
NL	0.7	85.2	85.3	85.6	85.5
A	1.4	84.0	83.1	83.3	84.7
P	-1.1	81.9	80.5	:	:
FIN	3.2	89.0	89.0	88.0	89.8
S	0.0	85.0	87.0	86.0	87.0
UK	-1.0	85.1	84.7	84.1	83.0

Source: DG II, Business Survey

Figure 2.24

Capacity utilisation rates for the main industrial groupings, 07-98 (%)



1) Data is for 04-97.

Source: DG II, Business Survey

Foreign trade indices

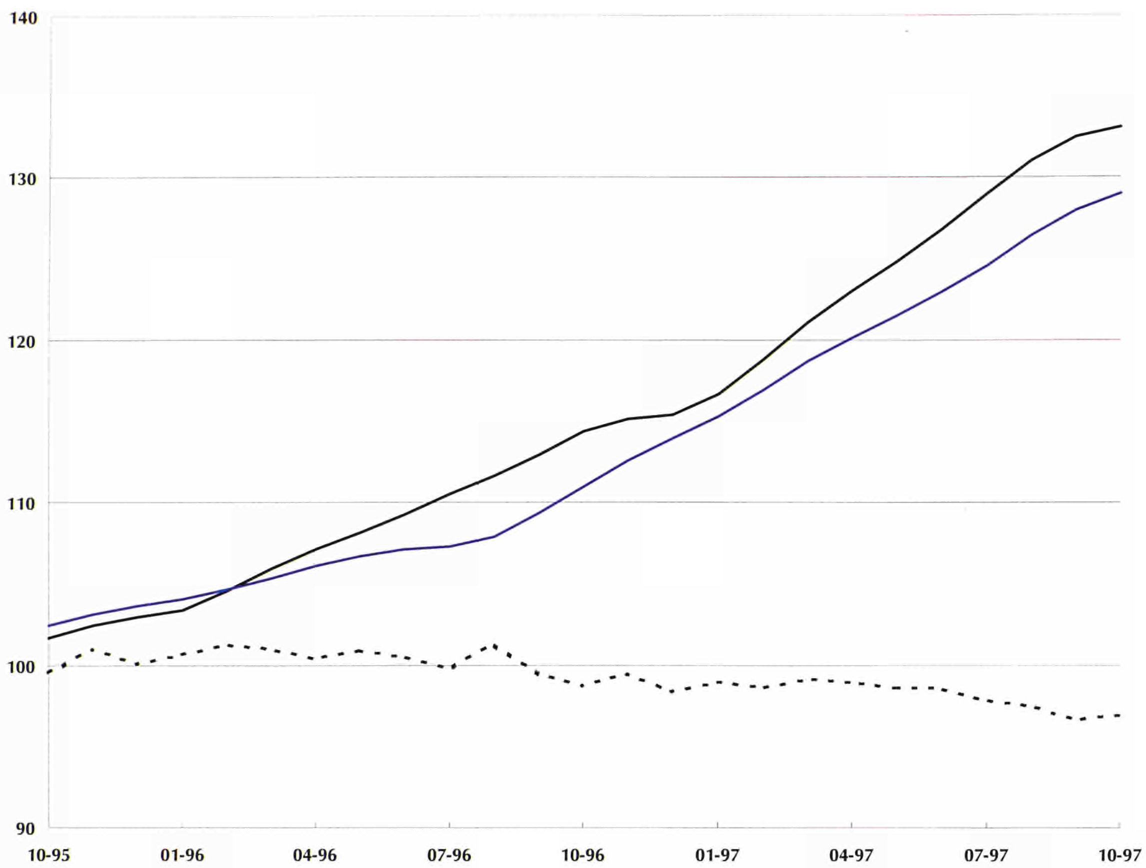
Figure 2.25

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

Source: eurostat

Figure 2.26

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



Export value index
Import value index
Terms of trade

Source: eurostat

Table 2.17

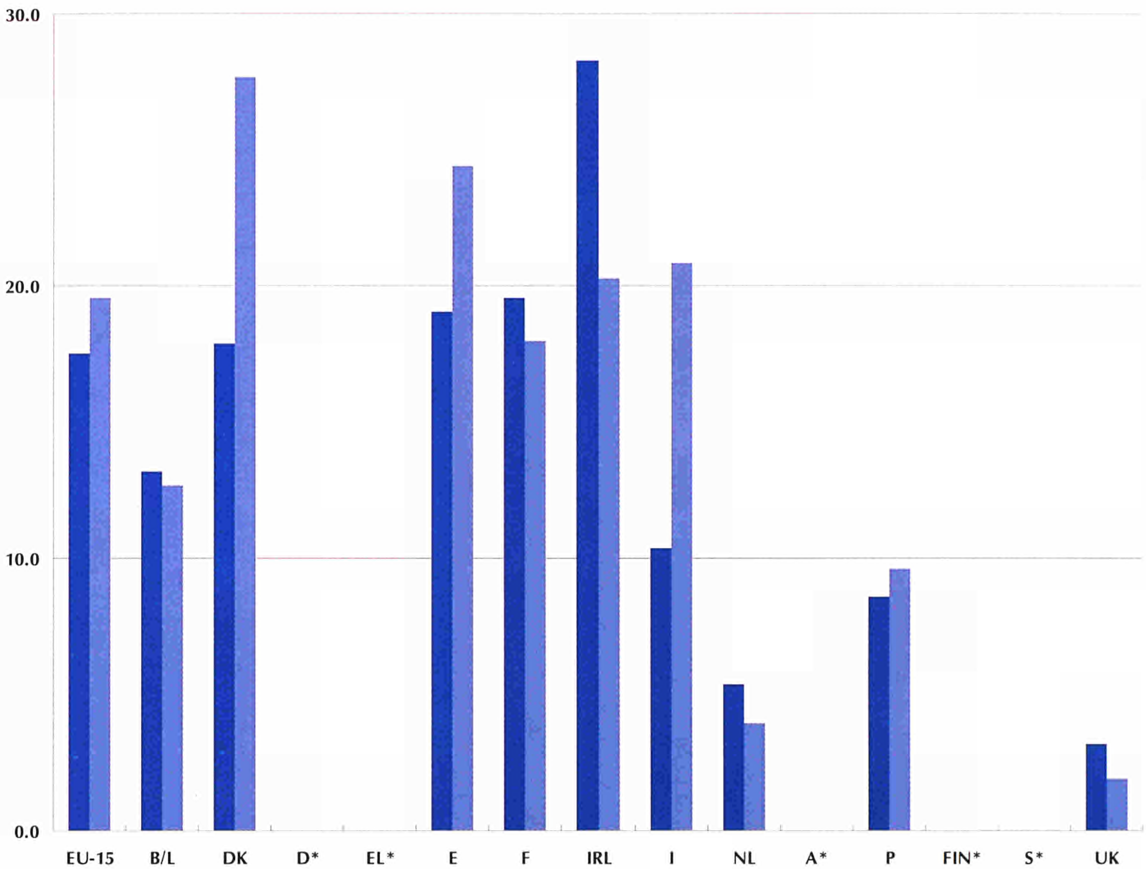
Foreign trade indices (value indices are in ECU terms): growth rate, three months compared to the previous three months (%)

	Latest 3 months available			Exports Value	Exports Volume	Imports Value	Imports Volume	Terms of trade
EU-15	08-97	⇨	10-97	4.2	2.5	3.9	1.9	-1.4
B/L	09-97	⇨	11-97	-3.7	0.6	-2.4	-3.3	-0.5
DK	09-97	⇨	11-97	1.8	0.6	2.8	1.3	1.2
D	07-97	⇨	09-97	3.1	2.4	3.2	1.7	-0.8
EL	07-97	⇨	09-97	3.1	1.3	1.5	-1.8	-0.2
E	09-97	⇨	11-97	4.5	3.4	6.4	6.0	1.2
F	09-97	⇨	11-97	4.2	3.1	3.3	1.5	-0.4
IRL	08-97	⇨	10-97	7.1	5.6	4.1	3.0	1.5
I	08-97	⇨	10-97	4.1	2.9	4.9	3.9	-1.2
NL	08-97	⇨	10-97	3.5	2.6	2.3	-0.2	0.2
A		⇨		:	:	:	:	:
P	08-97	⇨	10-97	2.3	0.4	3.5	0.9	-0.9
FIN		⇨		:	:	:	:	:
S		⇨		:	:	:	:	:
UK	09-97	⇨	11-97	0.0	-0.3	1.5	1.4	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

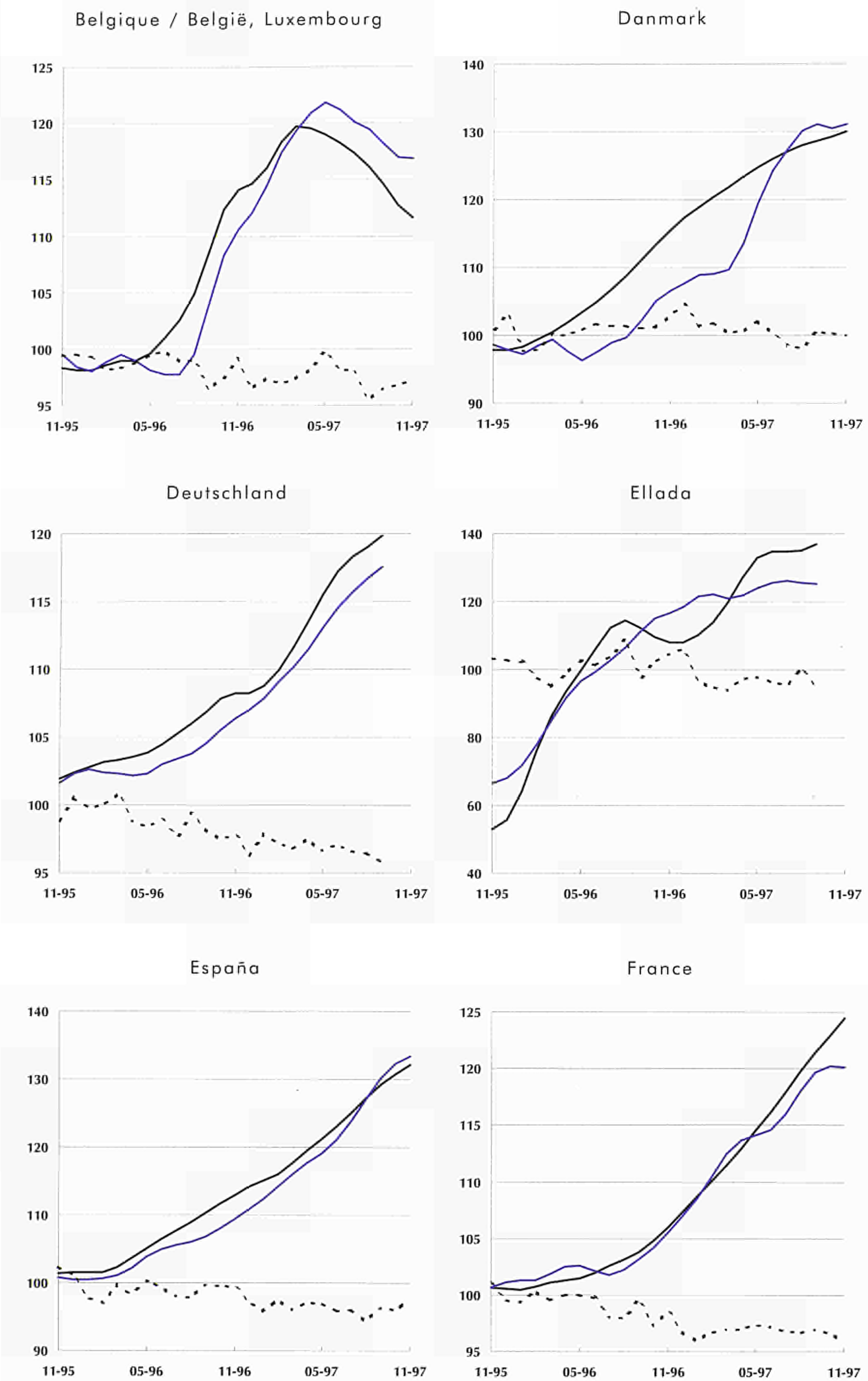
	Latest 3 months available			Exports Value	Exports Volume	Imports Value	Imports Volume	Terms of trade
EU-15	08-97	⇨	10-97	17.5	11.0	19.6	9.8	-2.8
B/L	09-97	⇨	11-97	3.8	-1.5	6.7	0.5	-0.8
DK	09-97	⇨	11-97	12.4	5.0	24.4	14.4	-1.5
D	07-97	⇨	09-97	13.0	8.5	14.2	7.3	-2.1
EL	07-97	⇨	09-97	6.5	-0.5	12.2	-1.5	-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

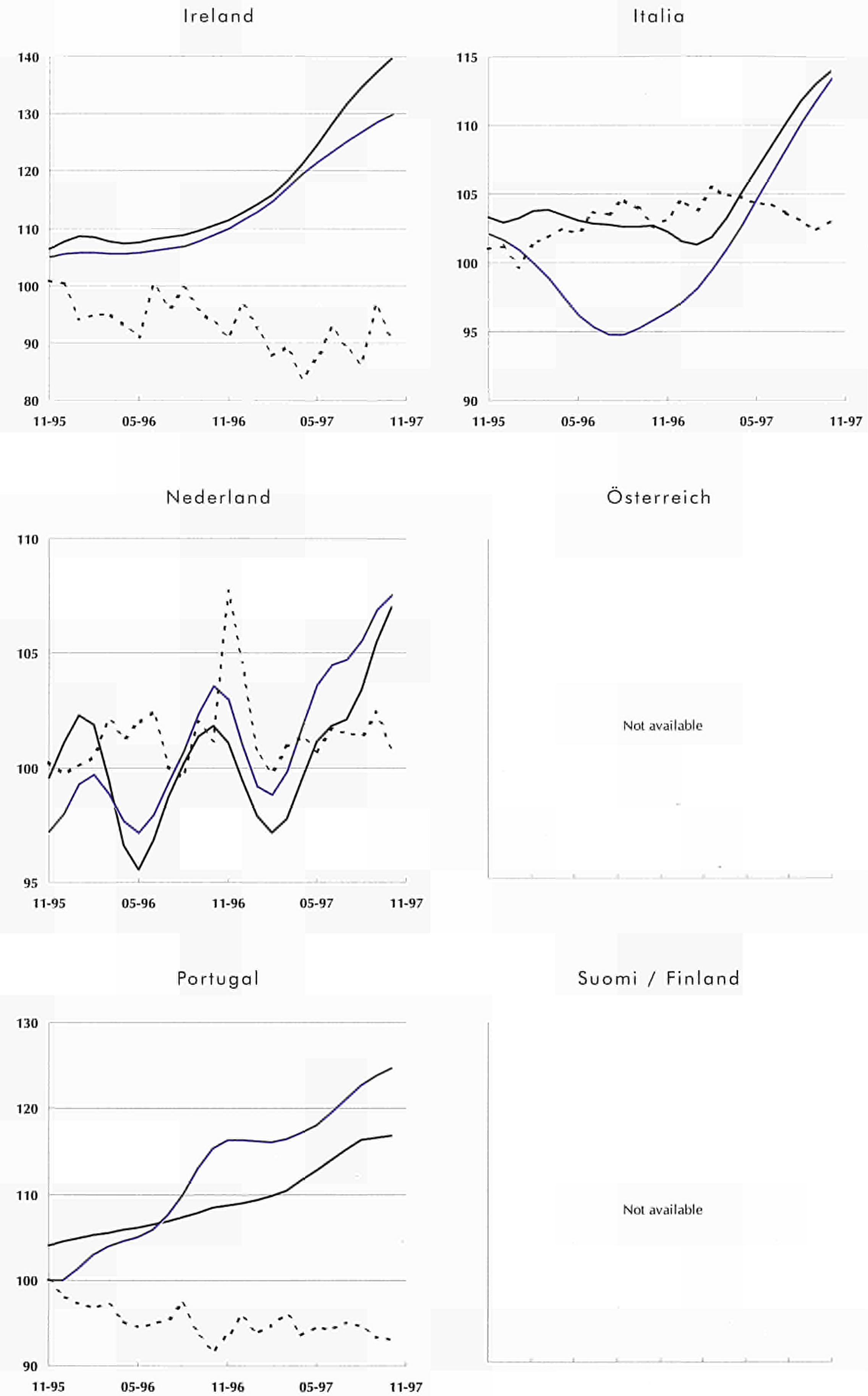
Terms of trade

Source: eurostat

Foreign trade indices (trend cycle)

Figure 2.28

Foreign trade indices in ECU terms (1995 = 100)



Export value index

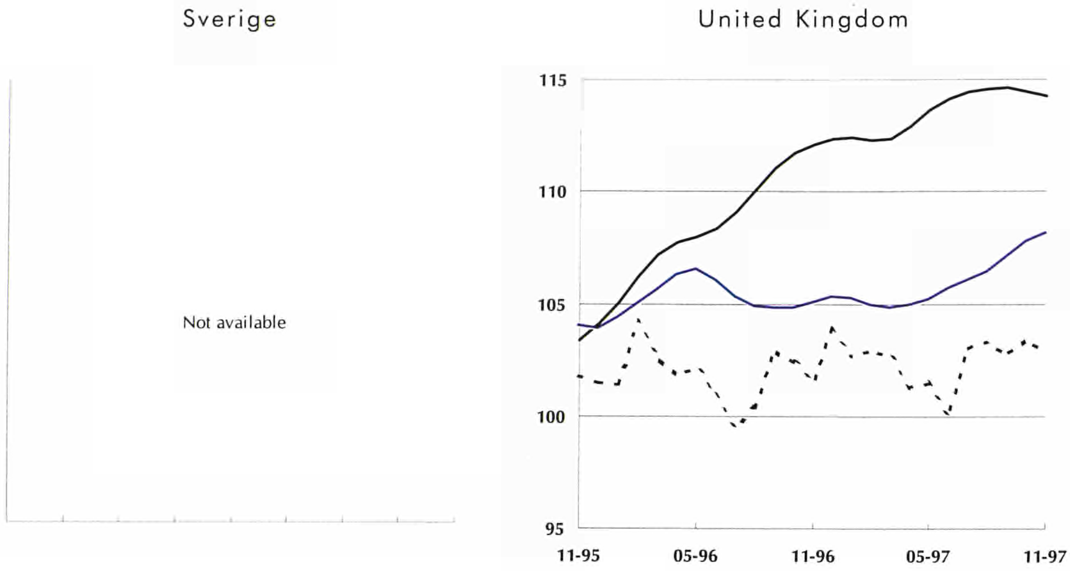
Import value index

Terms of trade

Source: eurostat

Figure 2.28

Foreign trade indices in ECU terms (1995 = 100)



Export value index ———

Import value index ———

Terms of trade -----

Source: eurostat

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 89.

3. Latest outlook: services

3. Latest outlook: services

Retail sales volumes

Latest data for retail sales within Europe is available through to March 1998, when sales volumes rose by 2.4% (three months average compared to a year before). The growth of retail sales within the countries that will make up the Euro zone was not as pronounced, rising by 2.1% over the same period. Within the Member States there were two countries that reported that retail sales were not expanding: they were Germany (latest data unchanged compared to March 1997) and Greece (latest data down 0.4% compared to May 1997). The fastest expansion of retail sales was being recorded in the Benelux countries and Ireland, where the latest growth rates were all above the level of five per cent per annum.

It is possible to analyse more recent trends in retail sales by looking at the retail sales volumes during the latest three months and comparing them to data from the previous three months. The advantage of using such a growth rate (compared to the annual measures above) is that they should be able to record turning points more efficiently. EU-15 retail sales volumes rose by 0.5% in the first quarter of 1998 compared to the final quarter of 1997. Data for the individual Member States showed that there was growth of 0.8% in France and 0.7% in the United Kingdom (both for the three months to May 1998 compared to the previous three months). In Italy there was a decline in retail sales volumes, of the magnitude of 0.2% to April 1998. Using the same measure, the two Member States with the highest rates of growth were Belgium (1.5%, to May 1998) and Ireland (2.2%, also to May 1998).

There is more detailed information available on retail sales volumes within three individual activities. The data for the EU-15 aggregate recorded retail sales volumes expanding in all three of these activities. The growth of EU-15 retail sales of household equipment was almost equal to two per cent per annum in the three months to March 1998. Nevertheless, retail sales volumes barely increased in both textiles, clothing, footwear and leather goods, or food, beverages and tobacco (up by 0.2% and 0.3% respectively, again to March 1998). The highest growth rates for food, beverages and tobacco were recorded in Ireland and the United Kingdom, where sales volumes rose by 1.5% and 1.0%. Italy and Belgium recorded the highest growth for sales of textiles, clothing, leather and footwear (up by 2.3% and 1.6%). With respect to the retail sale of household equipment, the highest growth rates were recorded in Ireland and Luxembourg.

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: dslux@eurostat.datashop.lu

German new vehicle registrations up 6.5% in three months to April 1998 (when compared to the same three months of 1997)

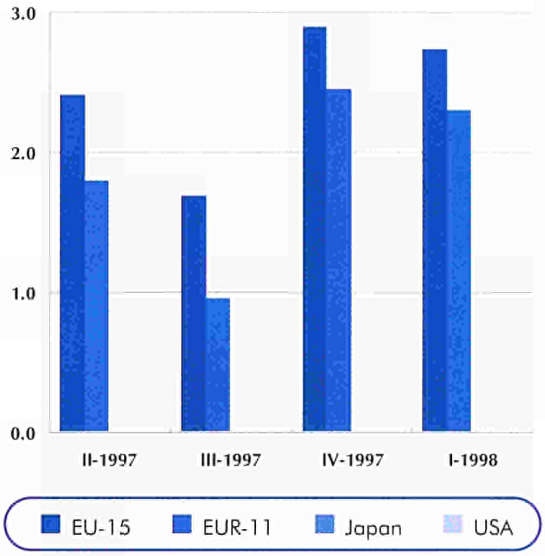


Figure 3.1

Volume of retail sales: growth rate, year on year (%)

Source: eurostat

New vehicle registrations

Looking at the evolution of new vehicle registrations we may observe wide ranging fluctuations in the latest growth rates. One means of helping us to see if there are any more long-term trends in the data is to aggregate the latest three months figures available. By doing so we may compare three month periods with the same three months of a year before and eliminate one-off fluctuations and outliers. Latest growth rates using this measure were: Germany (up 6.5%), France (up 13.1%), Italy (up 14.5%) and the United Kingdom (up 7.6%). The number of new vehicle registrations in Italy has been increasing at a rapid pace for more than twelve months, although it appears to have peaked. Growth rates rose from 12.4% in February 1997 through to 60.4% by October 1997. Since this date, whilst remaining positive, the growth in Italian new vehicle registrations has slowed, to 14.5% (first quarter of 1998, compared to the first quarter of 1997). There were two other Member State that were able to record growth in excess of the Italian figure. In Finland, during the second quarter of 1998, new vehicle registrations increased by 18.6% (compared to data from a year before), whilst in Luxembourg the three months to May 1998 saw growth of 15.5% recorded.

Figure 3.2

First registration of private and commercial cars: growth rate, year on year (%)

Source: eurostat

Table 3.1

Volume of retail sales: indices, gross data (1995 = 100)

	1995	1996	1997	03-98	04-98	05-98	06-98	07-98	08-98
EU-15	100.0	101.4	103.6	101.9	:	:	:	:	:
B	100.0	108.2	111.0	117.6	120.4	119.4	117.6	:	:
DK	100.0	101.5	103.6	96.2	107.4	104.9	102.1	112.0	105.9
D	100.0	99.2	97.7	99.4	98.6	95.9	90.7	98.1	:
EL	100.0	101.4	102.4	86.8	109.4	96.9	101.1	110.8	:
E	:	:	:	:	:	:	:	:	:
F	100.0	101.8	104.7	101.9	106.2	107.2	:	:	:
IRL	100.0	106.6	114.9	117.2	123.1	125.9	120.3	130.7	:
I	100.0	100.5	101.7	99.1	102.2	:	:	:	:
L	100.0	98.5	103.3	:	:	:	:	:	:
NL	100.0	103.1	107.1	103.5	110.7	118.0	113.7	119.0	106.4
A	100.0	102.1	102.1	102.0	:	:	:	:	:
P	:	:	:	:	:	:	:	:	:
FIN	100.0	104.4	108.5	103.3	110.9	112.6	119.3	:	:
S	100.0	100.4	103.9	101.9	103.6	109.8	107.8	104.0	110.1
UK	100.0	102.8	108.1	103.8	107.3	106.4	:	:	:
Japan	:	:	:	:	:	:	:	:	:
USA	:	:	:	:	:	:	:	:	:

Source: eurostat

Table 3.2

Volume of retail sales: indices, seasonally adjusted data (1995 = 100)

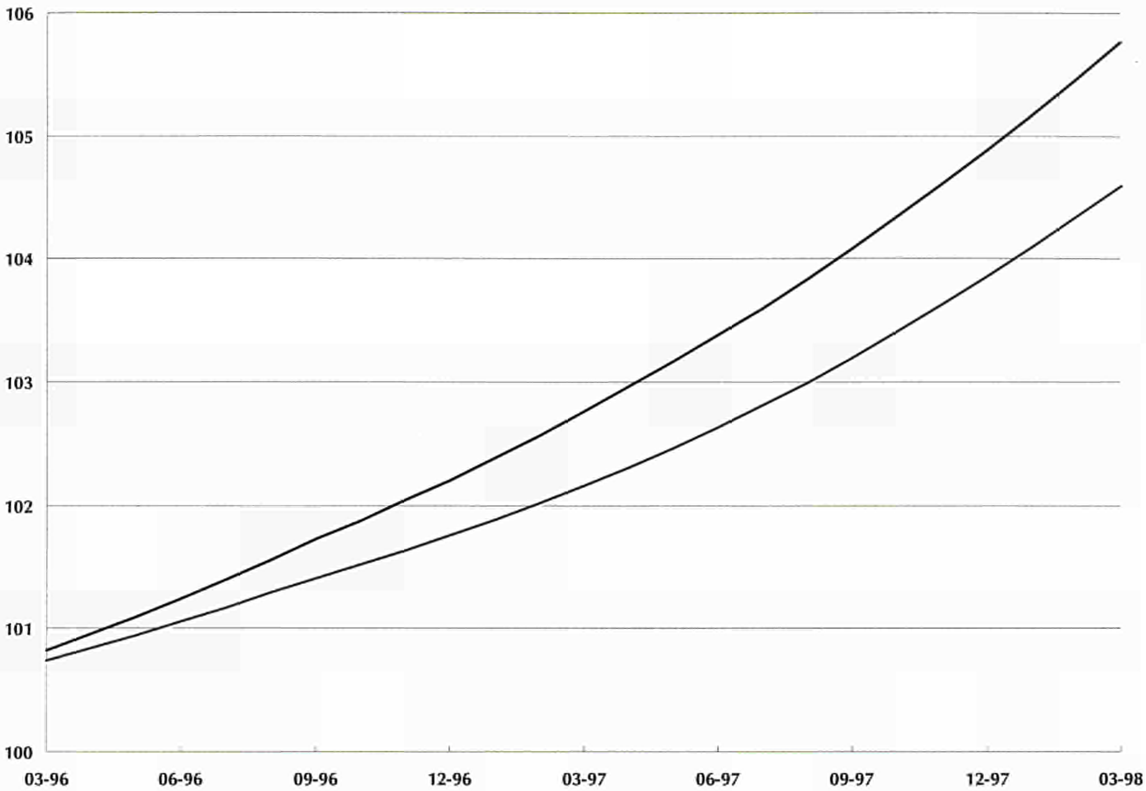
	1995	1996	1997	03-98	04-98	05-98	06-98	07-98	08-98
EU-15	100.0	101.4	103.6	105.7	:	:	:	:	:
B	100.0	108.2	111.0	114.9	116.8	117.4	114.9	:	:
DK	100.0	101.5	103.6	105.8	106.9	104.2	103.5	106.8	108.2
D	100.0	99.2	97.7	:	:	:	:	:	:
EL	100.0	101.4	102.4	100.6	:	:	:	:	:
E	:	:	:	:	:	:	:	:	:
F	100.0	101.8	104.7	106.6	108.8	108.0	:	:	:
IRL	100.0	106.6	114.9	121.7	123.2	125.7	123.1	128.3	:
I	100.0	100.5	101.7	101.4	101.5	:	:	:	:
L	100.0	98.5	103.3	:	:	:	:	:	:
NL	100.0	103.1	107.1	110.6	111.5	112.7	111.3	113.1	112.3
A	100.0	102.1	102.1	101.4	:	:	:	:	:
P	:	:	:	:	:	:	:	:	:
FIN	100.0	104.4	108.5	111.1	112.6	112.0	113.2	:	:
S	100.0	100.4	103.9	106.5	106.7	107.5	107.6	108.0	109.6
UK	100.0	102.8	108.1	111.2	111.0	112.9	:	:	:
Japan	:	:	:	:	:	:	:	:	:
USA	:	:	:	:	:	:	:	:	:

Source: eurostat

Retail sales

Figure 3.3

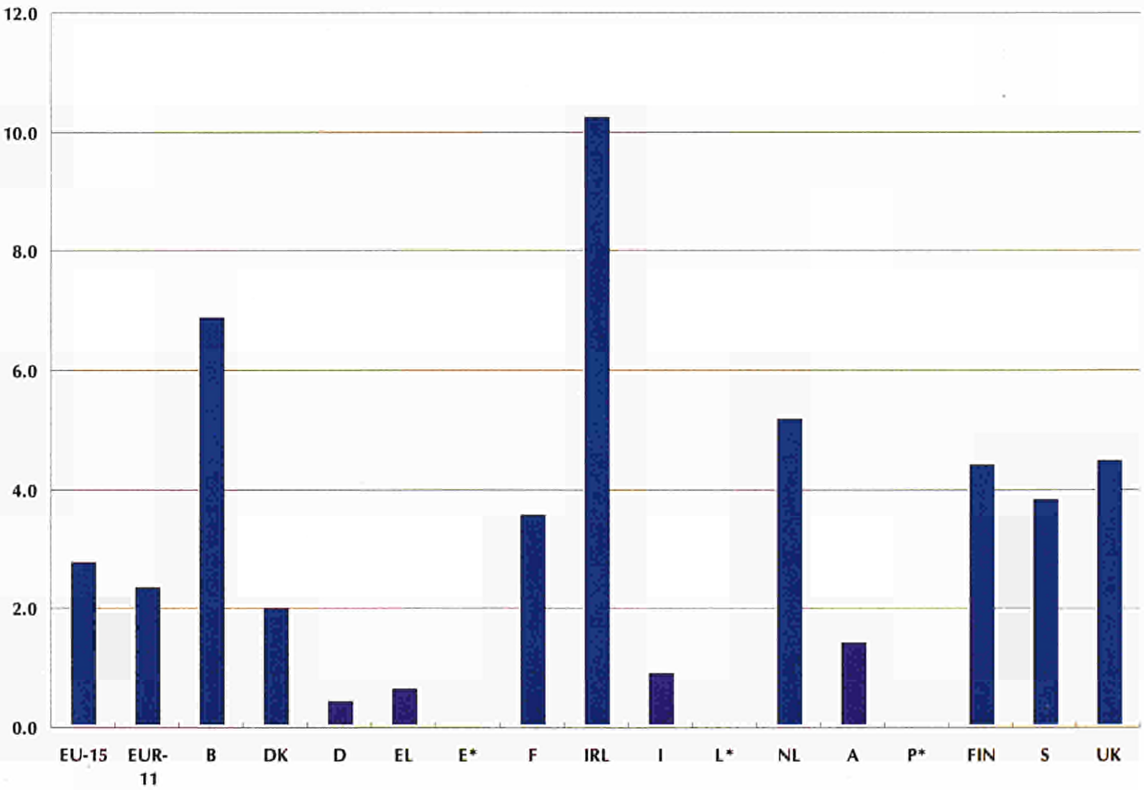
Volume of retail sales (1995 = 100)



Source: eurostat

Figure 3.4

Volume of retail sales: growth rate, three months compared to the same three months of the previous year, 01-98 to 03-98 (%)



Source: eurostat

Table 3.3

Volume of retail sales for food, beverages and tobacco in specialised stores: indices and latest growth rates (1995 = 100)

	1997	03-98	04-98	05-98	06-98	07-98	08-98	Latest 3 months available			t / t-1 (%)	t / t-4 (%)
EU-15	:	:	:	:	:	:	:	01-98	⇨	03-98	0.3	:
B	111.8	113.5	114.1	118.0	:	:	:	03-98	⇨	05-98	0.6	1.6
DK	101.4	98.0	107.9	101.3	100.1	107.4	103.1	06-98	⇨	08-98	-0.6	-0.3
D	97.8	95.5	101.9	98.7	92.6	99.3	:	05-98	⇨	07-98	:	0.1
EL	102.3	97.3	114.6	102.5	99.6	98.2	:	05-98	⇨	07-98	:	4.0
E	:	:	:	:	:	:	:		⇨		:	:
F	104.8	101.0	104.5	105.3	:	:	:	03-98	⇨	05-98	0.3	0.2
IRL	106.4	105.1	111.3	112.9	108.9	114.2	:	05-98	⇨	07-98	:	4.4
I	97.1	98.7	100.1	:	:	:	:	02-98	⇨	04-98	0.5	1.1
L	102.5	:	:	:	:	:	:	12-97	⇨	02-98	0.8	7.8
NL	:	98.6	103.2	108.0	102.2	106.8	100.0	06-98	⇨	08-98	:	:
A	98.8	96.0	101.2	100.5	98.3	104.7	:	05-98	⇨	07-98	0.5	2.5
P	:	:	:	:	:	:	:		⇨		:	:
FIN	103.7	99.4	110.8	106.0	116.0	:	:	04-98	⇨	06-98	1.2	3.6
S	103.3	102.0	100.5	106.7	105.4	105.9	106.1	06-98	⇨	08-98	:	-1.0
UK	104.7	106.5	108.9	107.3	:	:	:	03-98	⇨	05-98	1.0	4.0
Japan	:	:	:	:	:	:	:		⇨		:	:
USA	:	:	:	:	:	:	:		⇨		:	:

Source: eurostat

Table 3.4

Volume of retail sales for textiles, clothing, footwear and leather goods in specialised stores: indices and latest growth rates (1995 = 100)

	1997	03-98	04-98	05-98	06-98	07-98	08-98	Latest 3 months available			t / t-1 (%)	t / t-4 (%)
EU-15	106.4	94.8	108.6	:	:	:	:	02-98	⇨	04-98	0.7	0.4
B	124.1	120.7	143.6	144.6	:	:	:	03-98	⇨	05-98	2.3	5.7
DK	105.6	79.0	103.2	115.4	98.4	117.7	97.9	06-98	⇨	08-98	2.4	5.3
D	96.0	88.3	98.9	97.7	80.0	93.1	:	05-98	⇨	07-98	:	-3.0
EL	97.0	59.0	115.6	90.4	96.8	121.5	:	05-98	⇨	07-98	:	1.1
E	:	:	:	:	:	:	:		⇨		:	:
F	103.7	93.1	108.1	123.4	:	:	:	03-98	⇨	05-98	1.4	5.4
IRL	124.4	106.8	122.4	140.7	126.5	150.5	:	05-98	⇨	07-98	:	20.0
I	114.5	103.8	115.8	:	:	:	:	02-98	⇨	04-98	1.6	0.9
L	102.0	:	:	:	:	:	:	12-97	⇨	02-98	1.2	10.7
NL	104.7	89.1	107.9	119.5	108.6	117.9	103.1	06-98	⇨	08-98	0.8	6.8
A	102.1	89.8	106.4	104.0	89.6	99.8	:	05-98	⇨	07-98	0.5	2.7
P	:	:	:	:	:	:	:		⇨		:	:
FIN	105.5	97.3	103.2	119.9	110.9	:	:	04-98	⇨	06-98	1.0	3.2
S	99.0	87.3	101.6	115.4	104.3	95.5	107.0	06-98	⇨	08-98	:	10.0
UK	112.1	94.6	104.0	110.0	:	:	:	03-98	⇨	05-98	1.0	3.1
Japan	:	:	:	:	:	:	:		⇨		:	:
USA	:	:	:	:	:	:	:		⇨		:	:

Source: eurostat

Retail sales and first registration of private and commercial cars

Table 3.5

Volume of retail sales of household equipment in specialised stores: indices and latest growth rates (1995 = 100)

	1997	03-98	04-98	05-98	06-98	07-98	08-98	Latest 3 months available	t / t-1 (%)	t / t-4 (%)
EU-15	106.2	108.4	102.8	:	:	:	:	02-98 ⇨ 04-98	0.4	4.3
B	96.7	97.2	98.4	99.5	:	:	:	03-98 ⇨ 05-98	0.7	4.3
DK	:	:	:	:	:	:	:	⇨	:	:
D	96.6	110.1	95.6	95.5	92.0	95.9	:	05-98 ⇨ 07-98	:	0.3
EL	114.8	97.2	106.5	102.6	114.8	132.7	:	05-98 ⇨ 07-98	:	0.4
E	:	:	:	:	:	:	:	⇨	:	:
F	105.5	105.9	97.4	98.0	:	:	:	03-98 ⇨ 05-98	1.1	0.6
IRL	118.0	109.5	122.6	120.6	118.0	134.1	:	05-98 ⇨ 07-98	:	8.9
I	113.0	110.2	105.1	:	:	:	:	02-98 ⇨ 04-98	-1.0	-0.7
L	114.8	:	:	:	:	:	:	12-97 ⇨ 02-98	10.5	28.5
NL	111.5	113.2	116.5	121.1	125.8	130.0	108.3	06-98 ⇨ 08-98	2.1	10.3
A	105.2	96.3	92.5	89.3	94.2	106.6	:	05-98 ⇨ 07-98	0.7	-1.7
P	:	:	:	:	:	:	:	⇨	:	:
FIN	116.4	107.8	107.3	126.5	139.3	:	:	04-98 ⇨ 06-98	1.2	7.1
S	104.1	101.3	100.6	103.9	106.9	109.6	120.7	06-98 ⇨ 08-98	:	16.3
UK	117.6	114.1	120.1	113.3	:	:	:	03-98 ⇨ 05-98	0.9	9.1
Japan	:	:	:	:	:	:	:	⇨	:	:
USA	:	:	:	:	:	:	:	⇨	:	:

Source: eurostat

Table 3.6

First registration of private and commercial cars: units and latest growth rates (thousands)

	1997	04-98	05-98	06-98	07-98	08-98	09-98	Latest 3 months available	t / t-1 (%)	t / t-4 (%)
EU-15	13,328	:	:	:	:	:	:	⇨	:	:
B	407	49	:	:	:	:	:	02-98 ⇨ 04-98	:	14.2
DK	153	16	13	21	12	12	:	06-98 ⇨ 08-98	:	73.6
D	3,528	299	319	343	323	256	:	06-98 ⇨ 08-98	:	0.9
EL	162	:	:	:	:	:	:	01-98 ⇨ 03-98	:	9.5
E	1,091	101	101	118	:	:	:	04-98 ⇨ 06-98	:	10.3
F	1,713	166	137	102	:	:	:	04-98 ⇨ 06-98	:	7.2
IRL	126	17	:	:	:	:	:	02-98 ⇨ 04-98	:	9.7
I	2,412	231	217	216	:	:	:	04-98 ⇨ 06-98	:	-3.4
L	32	4	3	3	3	:	:	05-98 ⇨ 07-98	:	15.5
NL	478	48	47	49	50	:	:	05-98 ⇨ 07-98	:	17.3
A	302	:	:	:	:	:	:	10-97 ⇨ 12-97	:	-3.1
P	317	48	47	49	50	:	:	05-98 ⇨ 07-98	:	72.4
FIN	105	12	11	11	:	:	:	04-98 ⇨ 06-98	:	18.6
S	259	27	25	27	21	20	24	07-98 ⇨ 09-98	:	11.1
UK	2,244	178	:	:	:	:	:	02-98 ⇨ 04-98	:	9.9
Japan	:	:	:	:	:	:	:	⇨	:	:
USA	:	:	:	:	:	:	:	⇨	:	:

Source: eurostat

Figure 3.5

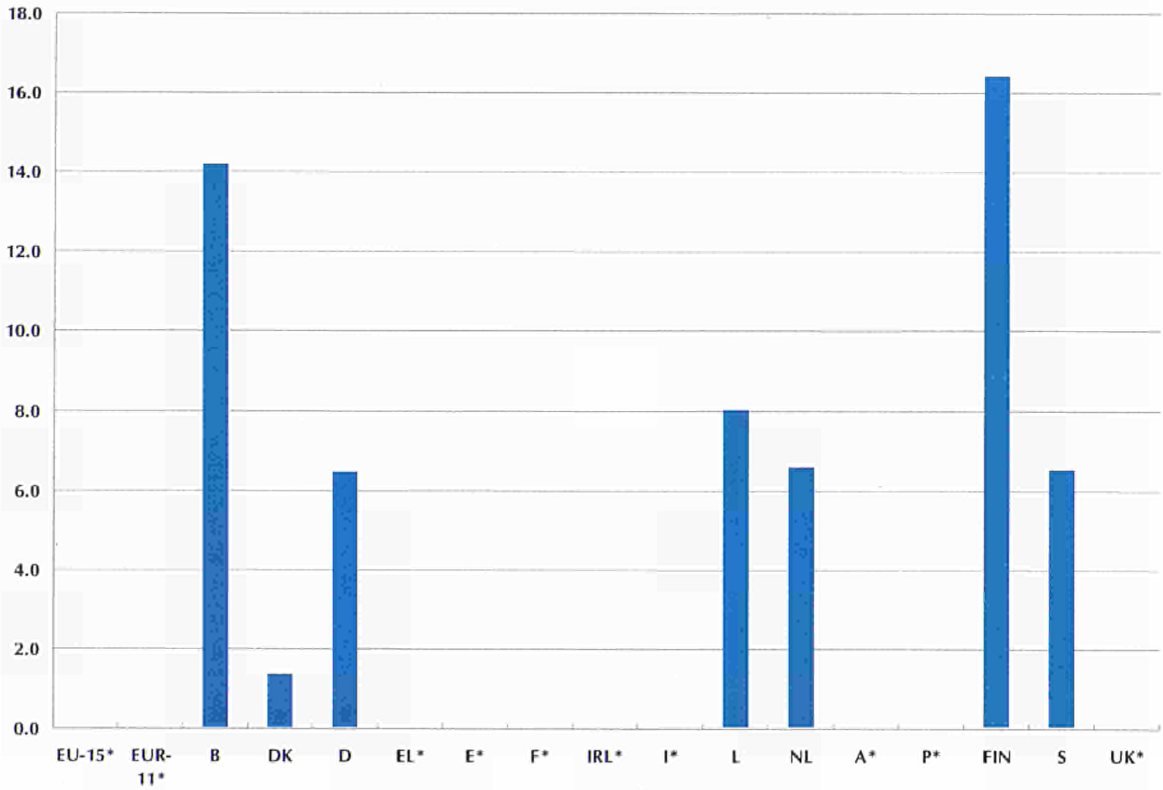
First registration of private and commercial cars (1995 = 100)

EU-15 ——
EUR-11——

Source:

Figure 3.6

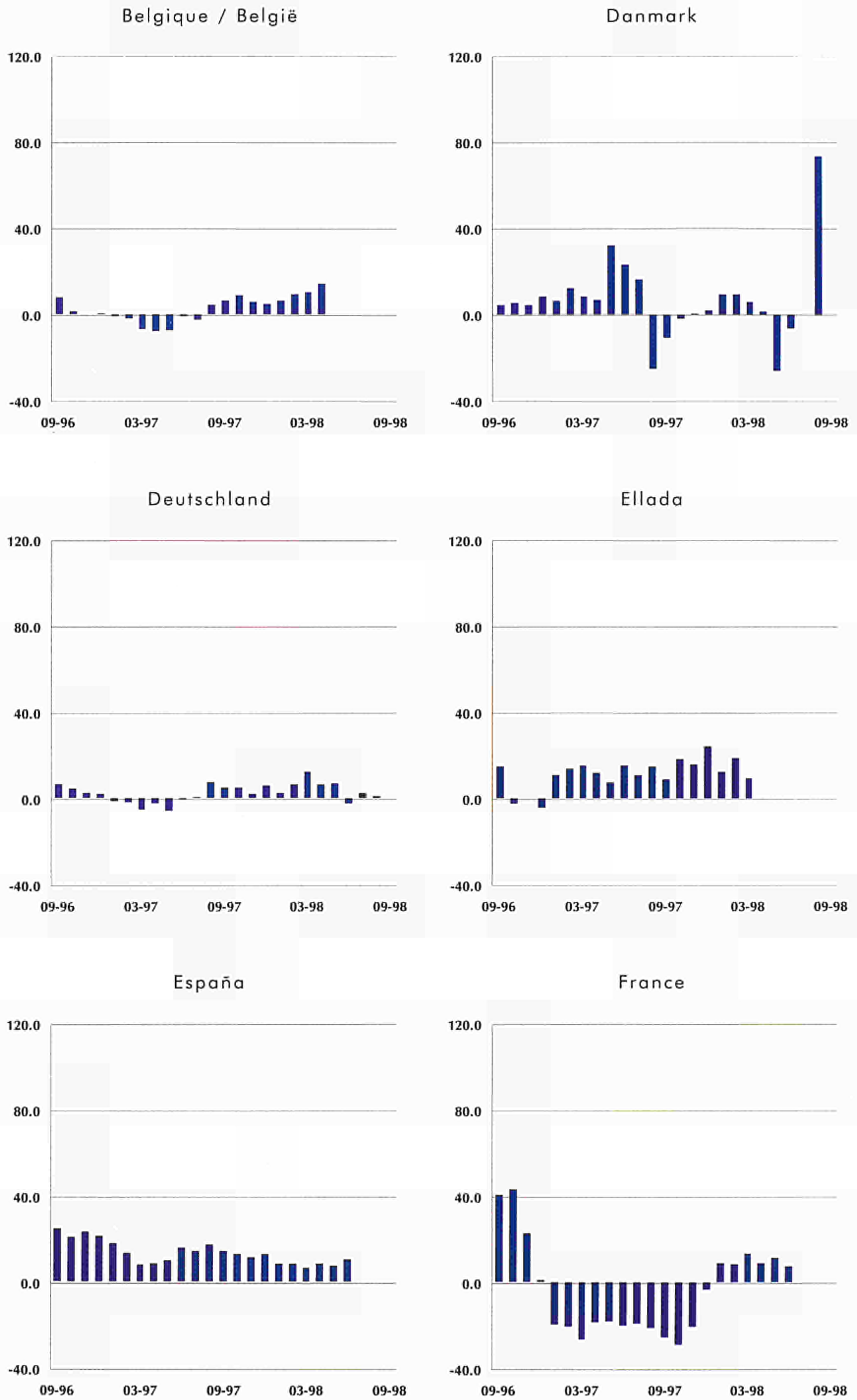
First registration of private and commercial cars: growth rate, three months compared to the same three months of the previous year, 02-98 to 04-98 (%)



Source:

Figure 3.7

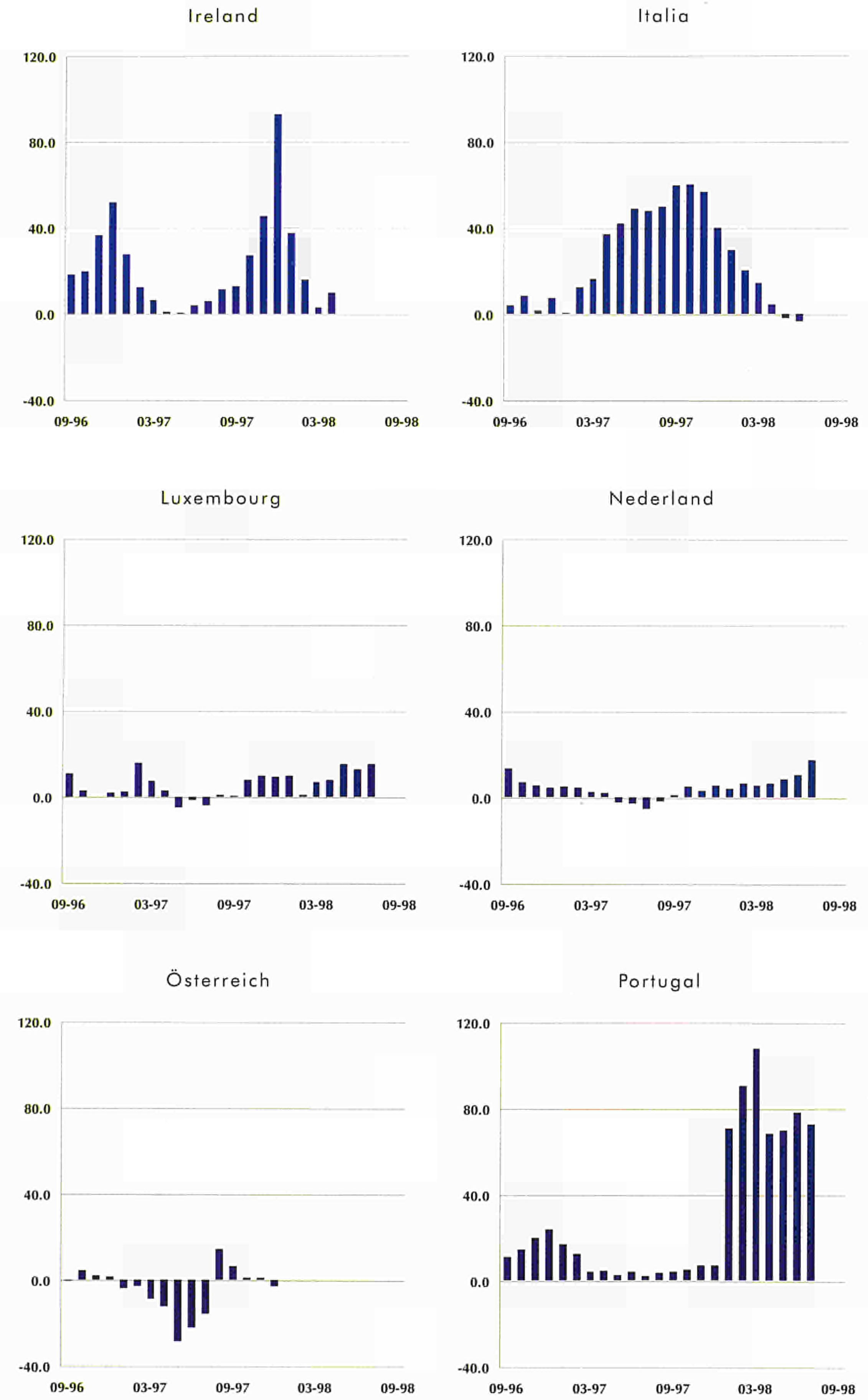
First registration of private and commercial cars: growth rate, three months compared to the same three months of the previous year (%)



Source: eurostat

Figure 3.7

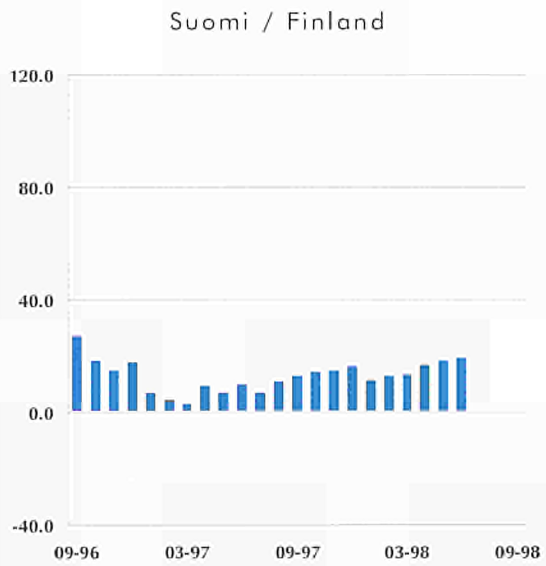
First registration of private and commercial cars: growth rate, three months compared to the same three months of the previous year (%)

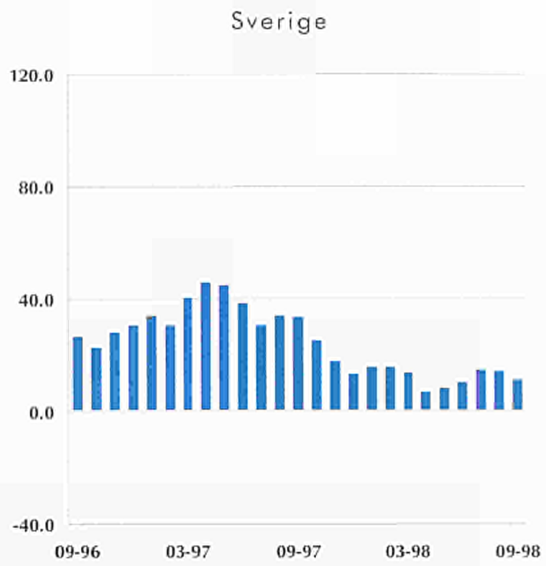


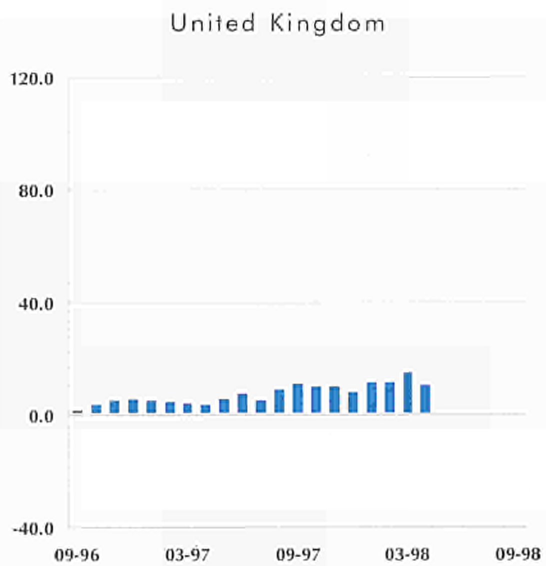
Source: eurostat

Figure 3.7

First registration of private and commercial cars: growth rate, three months compared to the same three months of the previous year (%)







Source: eurostat

Table 3.7

Guest flows in hotels and similar establishments, residents in the country: units and latest growth rates (thousands)

	1997	01-98	02-98	03-98	04-98	05-98	06-98	Latest 3 months available			t / t-4 (%)
EU-15	514,955	:	:	:	:	:	:		⇨		:
B	9,267	513	584	746	854	992	:	03-98	⇨	05-98	5.1
DK	4,505	176	189	234	282	376	:	03-98	⇨	05-98	-27.5
D	28,576	:	:	:	:	:	:	10-97	⇨	12-97	2.6
EL	39,992	:	:	:	:	:	:	10-97	⇨	12-97	12.3
E	106,102	4,540	5,039	6,083	7,544	11,723	12,942	04-98	⇨	06-98	6.4
F	60,624	:	:	:	:	:	:	10-97	⇨	12-97	9.5
IRL	13,000	:	:	:	:	:	:		⇨		:
I	84,565	3,386	:	:	:	:	:	11-97	⇨	01-98	-0.5
L	1,026	51	61	71	88	107	:	03-98	⇨	05-98	5.3
NL	11,245	:	:	:	:	:	:	10-97	⇨	12-97	18.8
A	53,376	:	:	:	:	:	:	10-97	⇨	12-97	0.2
P	20,851	896	1,131	1,554	1,815	2,139	:	03-98	⇨	05-98	0.0
FIN	3,171	247	180	217	179	236	:	03-98	⇨	05-98	-2.3
S	4,051	:	:	:	:	:	:	10-97	⇨	12-97	7.2
UK	88,200	3,650	3,070	4,460	5,480	6,950	8,540	04-98	⇨	06-98	0.6

Source: eurostat

Table 3.8

Guest flows in hotels and similar establishments, non-residents in the country: units and latest growth rates (thousands)

	1997	01-98	02-98	03-98	04-98	05-98	06-98	Latest 3 months available			t / t-4 (%)
EU-15	589,541	:	:	:	:	:	:		⇨		:
B	3,338	154	215	195	307	327	:	03-98	⇨	05-98	8.2
DK	6,122	273	275	352	295	348	:	03-98	⇨	05-98	-39.4
D	144,469	:	:	:	:	:	:	10-97	⇨	12-97	-0.6
EL	13,373	:	:	:	:	:	:	10-97	⇨	12-97	20.7
E	61,159	3,048	3,559	4,572	5,829	5,168	5,683	04-98	⇨	06-98	12.3
F	92,666	:	:	:	:	:	:	10-97	⇨	12-97	1.3
IRL	6,000	:	:	:	:	:	:		⇨		:
I	120,920	6,656	:	:	:	:	:	11-97	⇨	01-98	-0.9
L	83	5	6	7	7	7	:	03-98	⇨	05-98	-2.1
NL	9,861	:	:	:	:	:	:	10-97	⇨	12-97	13.7
A	16,083	:	:	:	:	:	:	10-97	⇨	12-97	7.1
P	8,499	434	504	559	703	646	:	03-98	⇨	05-98	-4.1
FIN	9,115	574	714	822	766	746	:	03-98	⇨	05-98	0.6
S	14,815	:	:	:	:	:	:	10-97	⇨	12-97	4.5
UK	94,900	3,310	4,480	5,570	6,390	7,330	:	03-98	⇨	05-98	-10.7

Source: eurostat

Table 3.9

Guest flows in other collective accommodation establishments, residents in the country: units and latest growth rates (thousands)

	1997	01-98	02-98	03-98	04-98	05-98	06-98	Latest 3 months available			t / t-4 (%)
EU-15	:	:	:	:	:	:	:		⇨		:
B	5,495	156	245	295	389	468	:	03-98	⇨	05-98	-4.6
DK	6,414	:	:	:	:	:	:		⇨		:
D	7,672	:	:	:	:	:	:	10-97	⇨	12-97	-5.9
EL	676	:	:	:	:	:	:	10-97	⇨	12-97	-4.0
E	50,675	:	:	:	:	:	:		⇨		:
F	:	:	:	:	:	:	:		⇨		:
IRL	:	:	:	:	:	:	:		⇨		:
I	32,636	358	:	:	:	:	:	11-97	⇨	01-98	5.5
L	1,249	6	10	8	56	121	:	03-98	⇨	05-98	-15.8
NL	9,608	:	:	:	:	:	:	10-97	⇨	12-97	12.9
A	6,918	:	:	:	:	:	:	10-97	⇨	12-97	24.9
P	1,750	63	65	39	92	92	:	03-98	⇨	05-98	8.5
FIN	474	12	8	11	9	17	:	03-98	⇨	05-98	-10.0
S	3,608	:	:	:	:	:	:	10-97	⇨	12-97	-19.3
UK	39,420	2,350	1,750	3,050	1,890	2,560	4,130	04-98	⇨	06-98	-0.2

Source: eurostat

Table 3.10

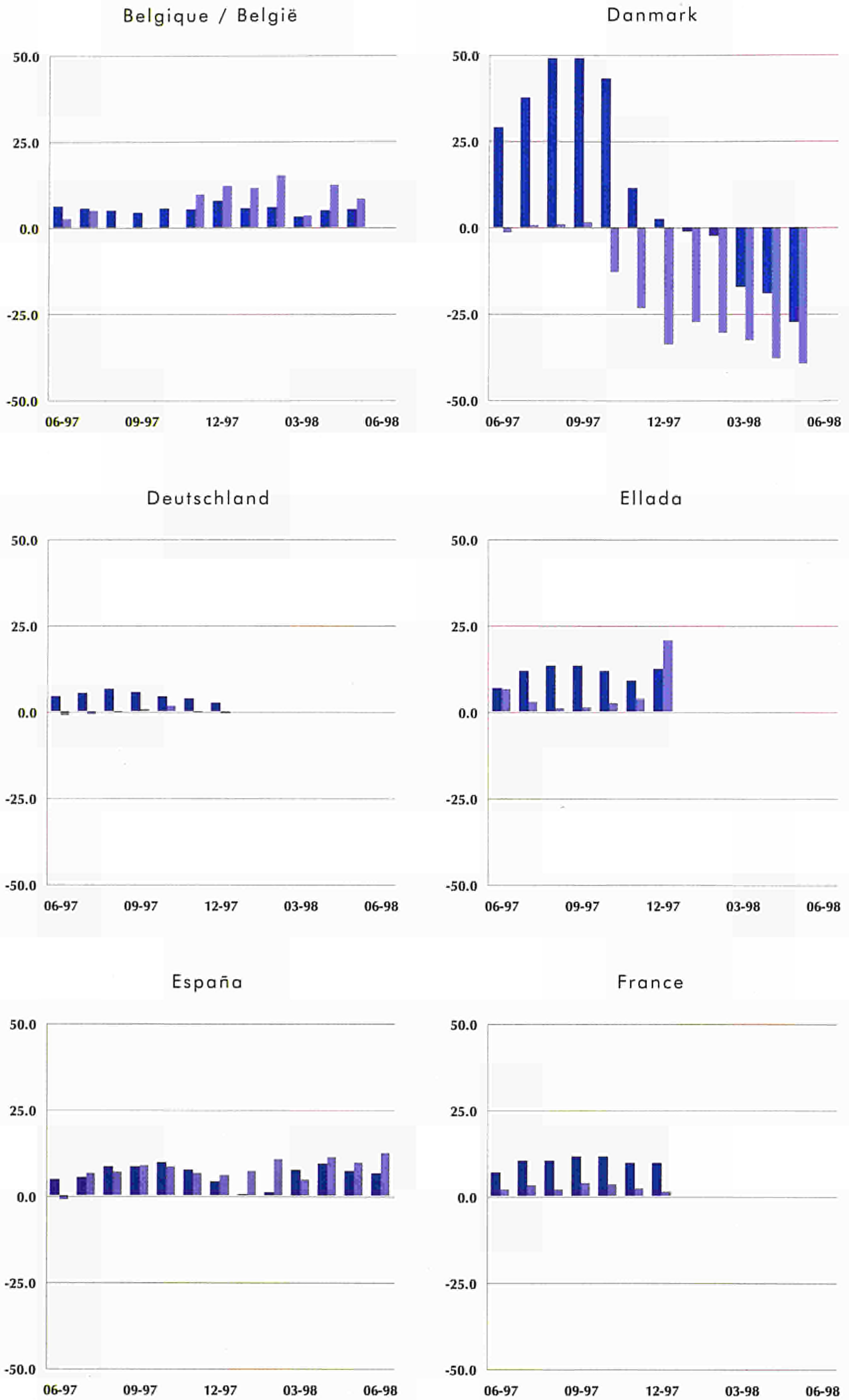
Guest flows in other collective accommodation establishments, non-residents in the country: units and latest growth rates (thousands)

	1997	12-97	01-98	02-98	03-98	04-98	05-98	Latest 3 months available			t / t-4 (%)
EU-15	:	:	:	:	:	:	:		⇨		:
B	10,394	444	262	403	437	758	742	03-98	⇨	05-98	-15.6
DK	8,779	:	:	:	:	:	:		⇨		:
D	127,263	5,202	:	:	:	:	:	10-97	⇨	12-97	-12.3
EL	461	:	:	:	:	:	:		⇨		:
E	19,367	301	:	:	:	:	:	10-97	⇨	12-97	-15.7
F	:	:	:	:	:	:	:		⇨		:
IRL	:	:	:	:	:	:	:		⇨		:
I	51,418	990	1,210	:	:	:	:	11-97	⇨	01-98	-2.0
L	117	3	2	3	3	14	24	03-98	⇨	05-98	22.1
NL	32,492	1,014	:	:	:	:	:	10-97	⇨	12-97	-4.8
A	7,388	304	:	:	:	:	:	10-97	⇨	12-97	7.8
P	6,208	72	71	99	116	150	262	03-98	⇨	05-98	-19.2
FIN	2,150	34	33	55	67	74	68	03-98	⇨	05-98	-13.3
S	14,454	217	:	:	:	:	:	10-97	⇨	12-97	-16.5
UK	90,700	1,310	860	1,220	1,750	5,420	9,590	03-98	⇨	05-98	-17.8

Source: eurostat

Figure 3.8

Nights spent in hotels and similar establishments: growth rate, three months compared to the same three months of the previous year (%)



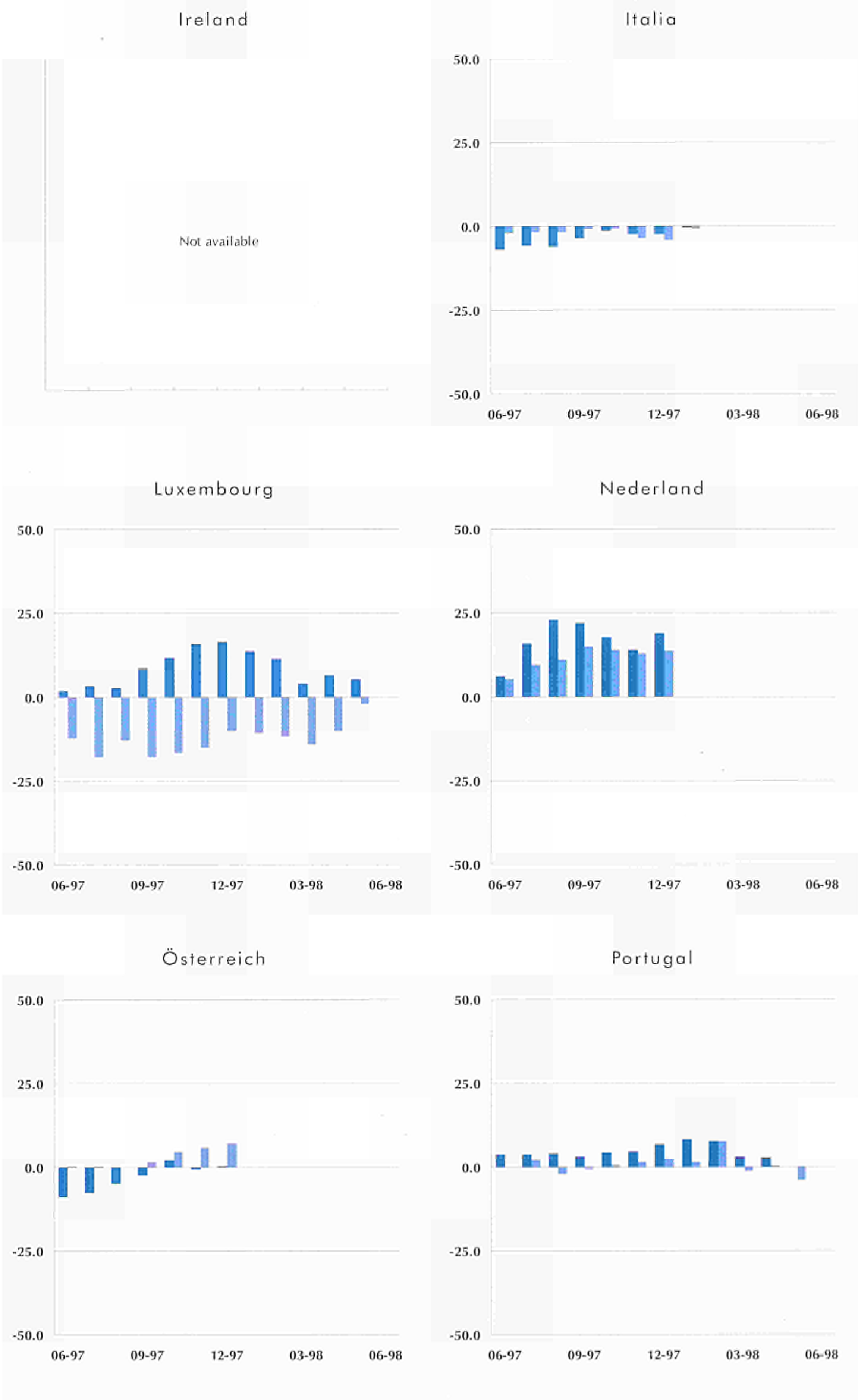
Residents

Non-residents

Source: eurostat

Figure 3.8

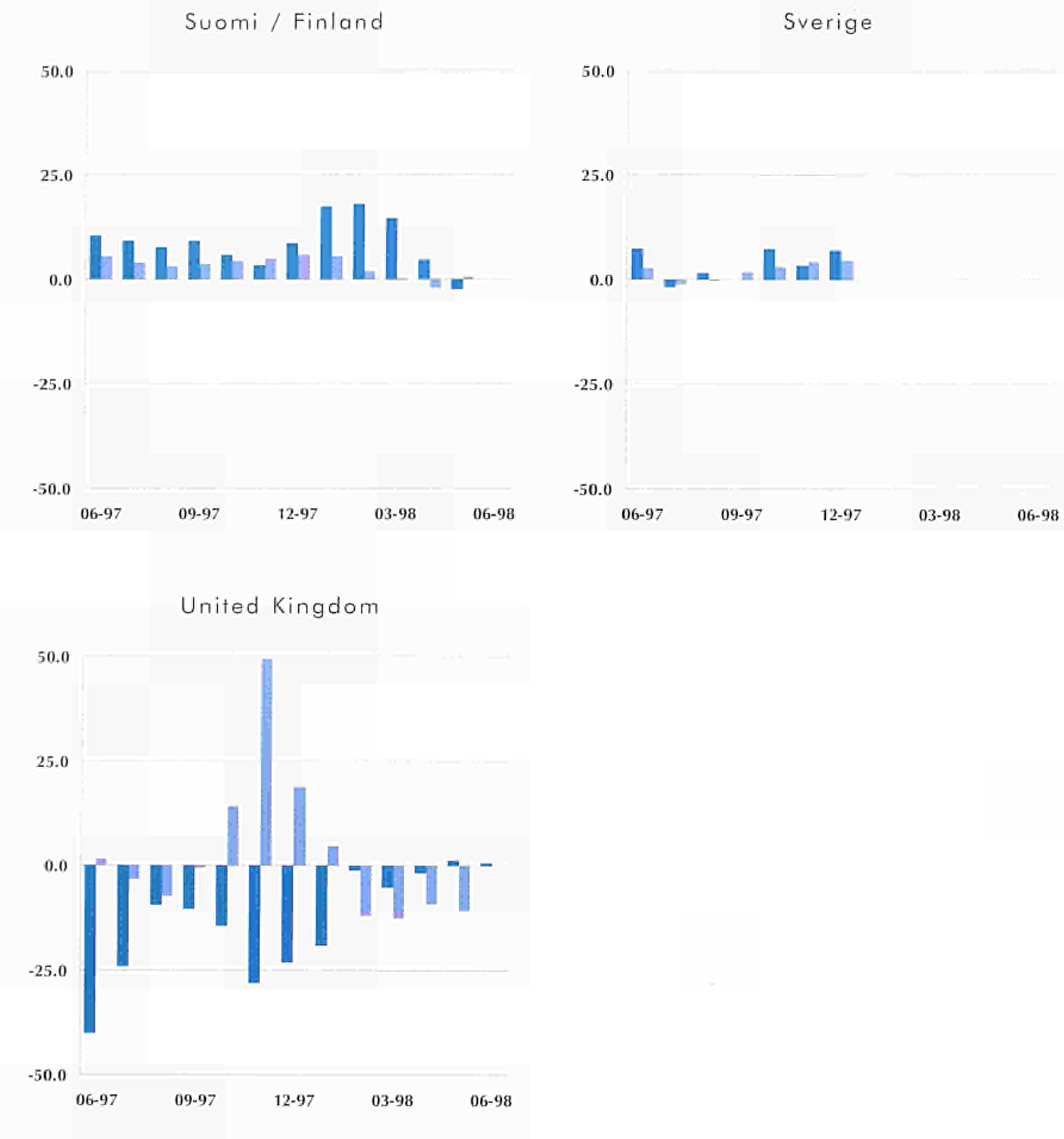
Nights spent in hotels and similar establishments: growth rate, three months compared to the same three months of the previous year (%)



Source: eurostat

Figure 3.8

Nights spent in hotels and similar establishments: growth rate, three months compared to the same three months of the previous year (%)



Residents

Non-residents

Source: eurostat

4. Textiles and textile products

4. Textiles and textile products

Description of the NACE Rev. 1 Groups in Division 17:

17.1: preparation and spinning of textile fibres;
17.2: textile weaving;
17.3: finishing of textiles;
17.4: manufacture of made-up textile articles, except apparel;
17.5: manufacture of other textiles;
17.6: manufacture of knitted and crocheted fabrics;
17.7: manufacture of knitted and crocheted articles

Data marked with this symbol is available on the diskette - **for further details see page 88**

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: dslux@eurostat.datashop.lu

Introduction

The textiles industry is composed of seven NACE Rev. 1 Groups and covers activities such as the preparation and spinning of textiles, weaving, finishing, the manufacture of carpets and rugs, as well as knitted and crocheted fabrics.

Textile industries produce mainly intermediate materials, which are then transformed by downstream activities to produce finished consumer goods. The textile industry delivers almost half of its production to the clothing industry, with links between the two industries very close. The textiles market is characterised by strong competition from a number of low-cost, developing countries. In addition, many European countries find it increasingly difficult to penetrate third country markets (especially low-price markets). European enterprises are facing competition in the following areas: subcontracting, outward processing, international sourcing strategies and new marketing strategies.

An important response that has developed in recent years as an industrial strategy to maintain international competitiveness is the integration of retailing and manufacturing across a range of textile and clothing activities. Many producers are developing, through the use of franchising contracts, their own distribution channels in order to be in direct contact with consumers, whilst transferring production facilities to lower labour cost locations to reinforce their competitiveness or better serve new markets.

Structure of production in Europe

Textile production is largely made up of small and medium sized enterprises, the industry accounted for 2.6% of EU-15 manufacturing production in current prices in 1997, whilst in the USA and Japan the shares were 2.3% and 2.1% respectively.

In 1997, the production of textiles in the EU increased to a value of 90.1 billion ECU (up by 2.6% compared to the value for 1996). There was also an increase in current ECU terms for the United States, with output rising from 72.8 billion ECU to 80.6 billion ECU. However, in Japan the textiles industry saw its production decline, down by 4.5% to 46.0 billion ECU.

European manufacturers are implementing international strategies in the face of low-price competition

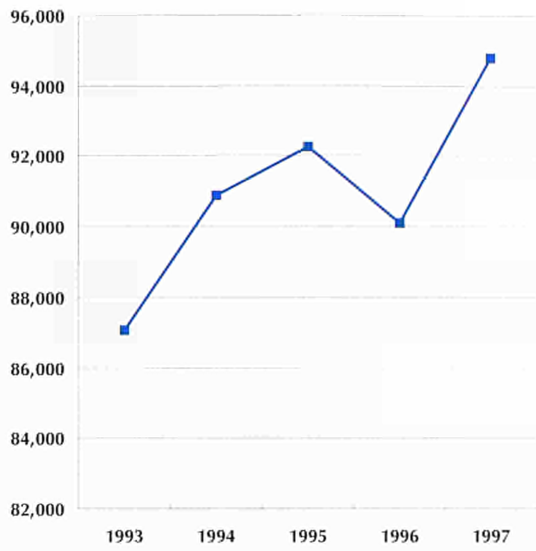


Figure 4.1

EU-15 production in constant prices (million ECU)

Source: eurostat

Within the EU, production values for 1997 (compared to 1996) generally displayed positive growth (although the data does not account for the changes in producer prices). The highest growth rates were recorded in the United Kingdom, Ireland and Italy. Denmark, Spain and Germany recorded reduced levels of output in 1997 compared to 1996.

Italy was the largest producer of textiles in 1997 with production equal to 28.1 billion ECU corresponding to 29.6% of total EU output. Italy was followed by three countries with very similar shares in EU production: Germany (14.4%), France (13.9%) and the United Kingdom (13.5%).

Portugal was the most specialised Member State in 1997, with a production specialisation ratio of 316%. In other words, the weight of the Portuguese textile industry in the manufacturing output of Portugal was more than three times the average seen across Europe. Two other countries had specialisation ratios more than double the European average, they were Greece and Italy (238% and 210%). Other countries that are relatively specialised in the textile industry include Belgium, Austria and Spain. At the other extreme the countries that specialise least in textiles production are Sweden, Finland, Ireland and Germany.

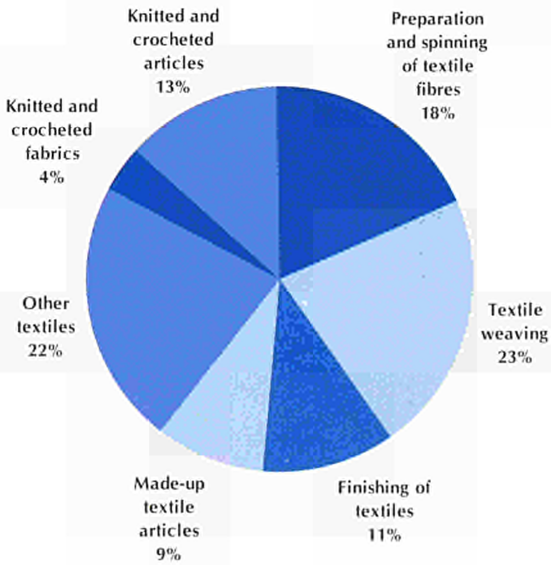


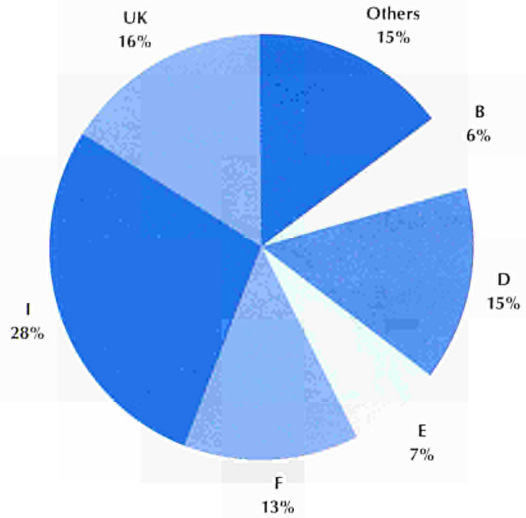
Figure 4.2

EU-15 share of production by industrial group, 1997

Source: eurostat

Figure 4.3

Share of EU-15 value-added at factor cost, 1997



Source: eurostat

Italy is the largest producer of textiles in Europe in value terms...

Employment trends

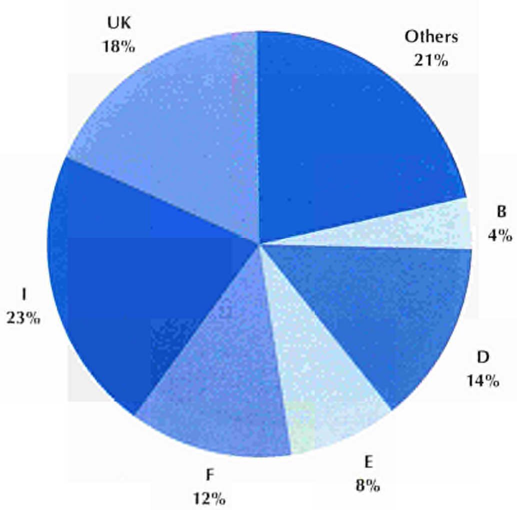
In 1997, 951 thousand persons were employed in the European textiles industry, down less than one per cent (0.2%) compared to the 1996 figure, whereas the USA and Japan saw reductions of 0.7% and 4.3% respectively. The European textiles industry had more persons employed than in either the United States (714 thousand) or Japan (452 thousand) in 1997.

Nevertheless, the labour markets in all three Triad countries have seen dramatic reductions over the course of the last decade. If we study the period 1985 to 1997 we find that in some EU Member States there has been a reduction of almost 50% of the workforce (Austria, Germany, Greece, Spain and Sweden). For EU-15, the same period saw employment reduced by 31%, whilst in Japan even higher losses were recorded (down 36%). Only in the United States did employment levels remain relatively unchanged (down by 1.0%). The most rapid pace of decline in Europe took place in the early nineties when more than 200 thousand persons lost their jobs in the space of the three years between 1990 and 1993.

Of the countries for which data is available, Italy had the highest number of persons employed, equal to some 208 thousand (or 22% of the European total). The United Kingdom had the second highest number of persons employed (18% of the European total), followed by Germany (14%) and France (12%). The fifth largest textile workforce in the EU is found in Portugal, with over ten per cent of the total number of persons employed in the EU in 1997 (11.4%).

Figure 4.4

Share of EU-15 number of persons employed, 1997



Source: eurostat

...and one of the most specialised in production (along with Portugal and Greece)

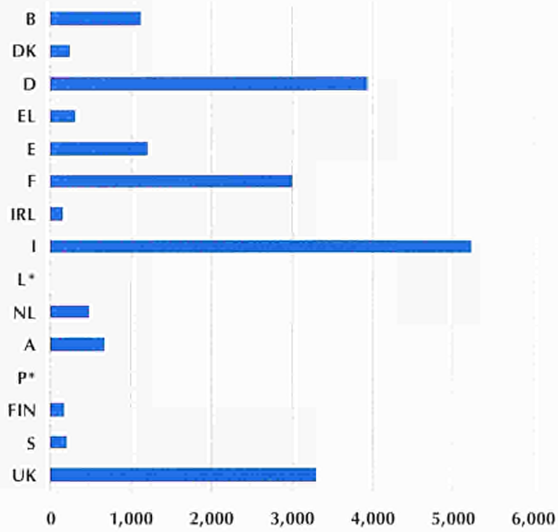


Figure 4.5

Labour costs, 1997 (million ECU)

Source: eurostat

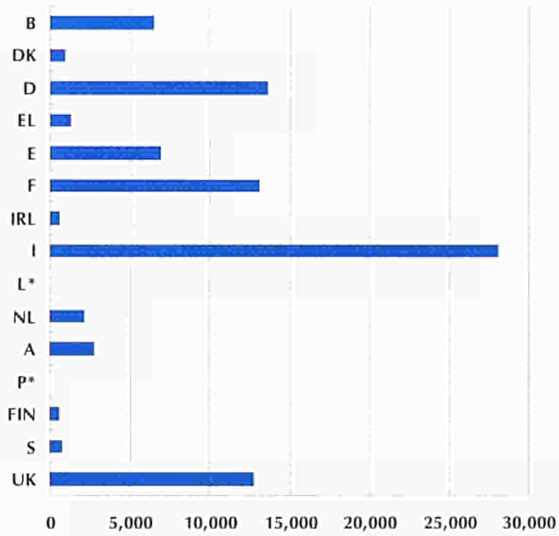


Figure 4.6

Production in constant prices, 1997 (million ECU)

Source: eurostat

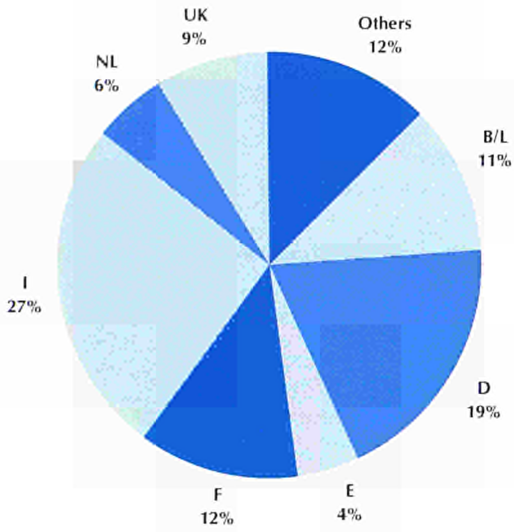
Recent trends

If we turn to short-term indicators we can observe that production in Europe has been unchanged for much of 1998. During the first six months of 1998 the European growth rate for industrial production in the textiles industry changed by between -0.1% and 0.1%. These growth rates are based on a comparison of the latest three months data compared to the previous three months data (they are not annualised - however, they do include corrections for seasonal effects and irregular one-off fluctuations). Data is available at a more disaggregated level of detail, where latest growth rates show that two of the seven Groups within the NACE Rev. 1 Division of textiles and textile products have recorded positive trends in output during the past two years. The manufacture of other textiles (NACE Rev. 1 17.5, which includes the manufacture of carpets, rugs, cordage, rope and twine) has reported positive trends in output in each of the past 22 months for which data are available. Latest data (for May 1998) showed that output for the EU was rising by 1.5% for the period March 1998 to May 1998 (when compared with data from December 1997 to February 1998). The other activity that has performed well in the last two years is the manufacture of knitted and crocheted fabrics (NACE Rev. 1 17.6). This industry experienced a downturn in activity in the final quarter of 1997 - otherwise, the past two years have also been in expansion. Latest data for April 1998 recorded gains of 0.7% for EU-15.

If we look at the growth in industrial production comparing the latest three months data to the same three months of the previous year we may observe that there are wide fluctuations in output from one month to the next in this particular industry.

Figure 4.7

Share of European exports to the rest of the world, 1997



Source: eurostat

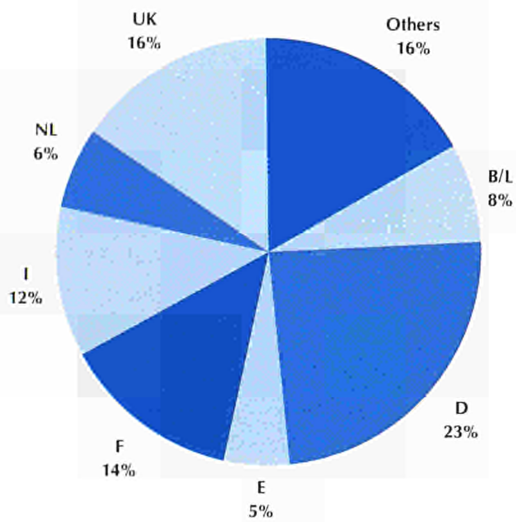
Country data records changes in output often in double figures (both positive and negative changes). The EU's largest producer of textiles, Italy, recorded five successive months of contraction in the textile industry (through to August 1998) explaining to a large degree the negative trend that has recently been seen in the EU aggregate. Belgium recorded high rates of growth in the first months of 1998 for this indicator (this stopped in the summer), as did the Netherlands and Spain.

European figures recorded thirteen consecutive months of growth up until March 1998. However, the latest figures available show that European output was down by 0.6% in the second quarter of 1998, when compared to the second quarter of 1997.

Producer prices in the textile industry have been rising at a moderate pace. Data for June 1998 showed that prices were increasing at the rate of 0.6% per annum. This marked a slowdown in the expansion of prices compared to the changes recorded in the first half of 1998. Producer prices had been expanding by 1.6% in January 1998, since when the rate of growth has slowed in successive months through to June 1998. Data available for the countries that will form the Euro zone records a very similar trend to that seen for EU-15. Monetary Union countries reported producer prices growing by 1.7% in the twelve months to January 1998. By June 1998 this rate of increase had slowed to only 0.5%.

Figure 4.8

Share of European imports from the rest of the world, 1997



Source: eurostat

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:
Eurostat Data-Shop
4, rue Alphonse Weicker
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fax: (352) 4335 22221
e-mail: dslux@eurostat.datashop.lu

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

Table 4.1

Value-added at factor cost (million ECU)

	1993	t / t-1 (%)	1994	t / t-1 (%)	1995	t / t-1 (%)	1996	t / t-1 (%)	1997	t / t-1 (%)
EU-15	29,594	-6.7	30,561	3.3	30,172	-1.3	29,574	-2.0	31,136	5.3
EUR-11	:	:	:	:	:	:	:	:	:	:
B	:	:	:	:	1,861	:	1,743	-6.4	1,834	5.2
DK	325	-3.4	334	2.9	317	-5.3	334	5.3	317	-5.0
D	6,284	-4.1	5,999	-4.5	5,315	-11.4	4,725	-11.1	4,640	-1.8
EL	:	:	:	:	:	:	:	:	:	:
E	2,054	-19.1	2,162	5.3	2,191	1.4	2,288	4.4	2,208	-3.5
F	3,958	-6.2	4,325	9.3	4,246	-1.8	4,036	-4.9	4,098	1.5
IRL	217	6.0	219	1.0	197	-9.9	205	3.7	221	8.3
I	7,323	-8.6	7,699	5.1	7,862	2.1	8,173	4.0	8,797	7.6
L	:	:	:	:	:	:	:	:	:	:
NL	739	1.9	733	-0.8	719	-1.9	705	-2.0	710	0.7
A	1,026	-2.2	1,012	-1.4	1,135	12.2	1,089	-4.1	1,121	3.0
P	:	:	:	:	:	:	:	:	:	:
FIN	172	-8.2	222	28.9	249	11.9	258	3.8	255	-1.1
S	250	-20.8	280	12.0	274	-2.1	308	12.7	307	-0.4
UK	4,076	-3.0	4,263	4.6	4,127	-3.2	4,188	1.5	5,004	19.5

Source: eurostat

Table 4.2

Production in constant prices (million ECU)

	1993	t / t-1 (%)	1994	t / t-1 (%)	1995	t / t-1 (%)	1996	t / t-1 (%)	1997	t / t-1 (%)
EU-15	87,046	-7.4	90,881	4.4	92,250	1.5	90,093	-2.3	94,771	5.2
EUR-11	74,171	-7.9	77,401	4.4	78,837	1.9	76,369	-3.1	78,934	3.4
B	4,692	1.8	4,863	3.6	6,650	36.7	6,225	-6.4	6,549	5.2
DK	835	-6.8	860	2.9	916	6.6	980	6.9	917	-6.4
D	17,538	-6.2	16,907	-3.6	15,777	-6.7	13,990	-11.3	13,675	-2.3
EL	1,243	-4.6	1,243	0.0	1,262	1.6	1,260	-0.2	1,318	4.6
E	5,951	-18.8	6,431	8.1	6,949	8.1	7,359	5.9	6,999	-4.9
F	12,123	-6.0	13,188	8.8	13,697	3.9	13,033	-4.8	13,143	0.8
IRL	:	:	556	:	547	-1.7	550	0.6	615	11.8
I	24,098	-9.3	25,973	7.8	25,158	-3.1	26,100	3.7	28,104	7.7
L	:	:	:	:	:	:	:	:	:	:
NL	2,181	3.3	2,152	-1.3	2,193	1.9	2,129	-3.0	2,213	3.9
A	2,691	-4.4	2,669	-0.8	2,797	4.8	2,682	-4.1	2,763	3.0
P	:	:	:	:	:	:	:	:	:	:
FIN	408	-7.1	489	19.8	610	24.7	640	4.9	638	-0.3
S	622	-21.8	684	9.9	713	4.3	803	12.7	800	-0.4
UK	10,174	-2.8	10,694	5.1	10,521	-1.6	10,681	1.5	12,802	19.9

Source: eurostat

Number of persons employed & labour costs

Table 4.3

Number of persons employed (units)

	1993	t / t-1 (%)	1994	t / t-1 (%)	1995	t / t-1 (%)	1996	t / t-1 (%)	1997	t / t-1 (%)
EU-15	1,064,920	-7.2	1,037,260	-2.6	1,010,960	-2.5	952,093	-5.8	950,628	-0.2
EUR-11	846,667	-8.4	829,981	-2.0	804,574	-3.1	744,420	-7.5	737,448	-0.9
B	41,919	-7.6	41,007	-2.2	46,029	12.2	41,794	-9.2	41,600	-0.5
DK	7,762	-5.8	7,678	-1.1	7,643	-0.5	8,137	6.5	7,655	-5.9
D	187,970	-9.8	170,965	-9.0	150,333	-12.1	136,932	-8.9	129,252	-5.6
EL	25,120	-11.9	22,255	-11.4	21,363	-4.0	20,698	-3.1	22,755	9.9
E	95,265	-17.2	99,219	4.2	94,941	-4.3	100,408	5.8	79,912	-20.4
F	123,860	-8.7	126,890	2.4	125,634	-1.0	119,567	-4.8	114,993	-3.8
IRL	8,391	-3.8	9,628	14.7	9,628	0.0	9,189	-4.6	9,423	2.5
I	212,672	-2.9	211,122	-0.7	204,688	-3.0	195,446	-4.5	207,590	6.2
L	:	:	:	:	:	:	:	:	:	:
NL	:	:	:	:	:	:	:	:	:	:
A	27,307	-13.1	26,747	-2.1	24,098	-9.9	23,441	-2.7	21,127	-9.9
P	:	:	:	:	:	:	:	:	:	:
FIN	6,089	-10.1	5,920	-2.8	7,003	18.3	7,468	6.6	7,506	0.5
S	7,514	-17.0	7,545	0.4	7,215	-4.4	7,417	2.8	7,506	1.2
UK	177,857	0.7	169,801	-4.5	170,165	0.2	171,421	0.7	175,264	2.2

Source: eurostat

Table 4.4

Labour costs (million ECU)

	1993	t / t-1 (%)	1994	t / t-1 (%)	1995	t / t-1 (%)	1996	t / t-1 (%)	1997	t / t-1 (%)
EU-15	21,509	-7.7	21,469	-0.2	21,151	-1.5	20,591	-2.6	20,878	1.4
EUR-11	18,025	-8.2	17,950	-0.4	17,756	-1.1	17,076	-3.8	16,826	-1.5
B	:	:	:	:	1,307	:	1,165	-10.9	1,124	-3.5
DK	216	-2.1	219	1.1	236	7.8	252	6.7	235	-6.6
D	5,153	-2.9	4,857	-5.7	4,513	-7.1	4,222	-6.4	3,932	-6.9
EL	301	-14.2	285	-5.2	290	1.5	304	5.1	303	-0.6
E	1,492	-22.1	1,483	-0.6	1,454	-1.9	1,580	8.7	1,206	-23.7
F	3,109	-3.6	3,243	4.3	3,315	2.2	3,170	-4.4	2,994	-5.6
IRL	:	:	148	:	148	0.1	149	0.7	159	6.7
I	4,719	-13.4	4,787	1.4	4,678	-2.3	4,859	3.9	5,230	7.6
L	:	:	:	:	:	:	:	:	:	:
NL	536	4.0	503	-6.1	493	-2.0	470	-4.7	487	3.5
A	748	-4.1	745	-0.4	783	5.1	760	-2.9	675	-11.2
P	:	:	:	:	:	:	:	:	:	:
FIN	114	-13.3	127	11.0	165	30.1	173	4.6	172	-0.3
S	182	-29.1	190	4.1	192	1.0	216	12.7	215	-0.4
UK	2,784	-1.2	2,826	1.5	2,678	-5.2	2,743	2.4	3,299	20.3

Source: eurostat

Table 4.5

Extra-EU-15 exports (million ECU)

	1993	t / t-1 (%)	1994	t / t-1 (%)	1995	t / t-1 (%)	1996	t / t-1 (%)	1997	t / t-1 (%)
EU-15	14,870	9.6	16,766	12.7	18,035	7.6	19,280	6.9	21,299	10.5
B/L	1,084	27.6	1,313	21.1	1,361	3.7	1,487	9.3	1,524	2.5
DK	231	0.9	246	6.2	254	3.5	301	18.5	331	9.8
D	4,752	9.4	5,112	7.6	5,474	7.1	5,564	1.6	5,712	2.7
EL	88	14.7	102	15.4	98	-4.1	105	7.7	121	15.0
E	550	6.0	598	8.8	696	16.4	746	7.1	869	16.5
F	1,741	5.0	1,950	12.0	2,121	8.8	2,152	1.5	2,412	12.1
IRL	56	27.6	59	5.5	64	8.0	64	-0.2	74	16.0
I	3,331	10.9	4,077	22.4	4,467	9.6	5,118	14.6	5,742	12.2
NL	611	7.6	655	7.1	721	10.1	722	0.2	882	22.3
A	513	6.8	517	0.8	545	5.5	582	6.7	658	13.1
P	247	-4.3	290	17.2	315	8.8	344	8.9	420	22.3
FIN	111	10.0	143	28.3	114	-20.6	128	12.4	151	18.3
S	197	-8.5	242	23.3	290	19.7	314	8.1	337	7.5
UK	1,358	11.5	1,463	7.7	1,515	3.5	1,655	9.3	2,066	24.8

Source: eurostat

Table 4.6

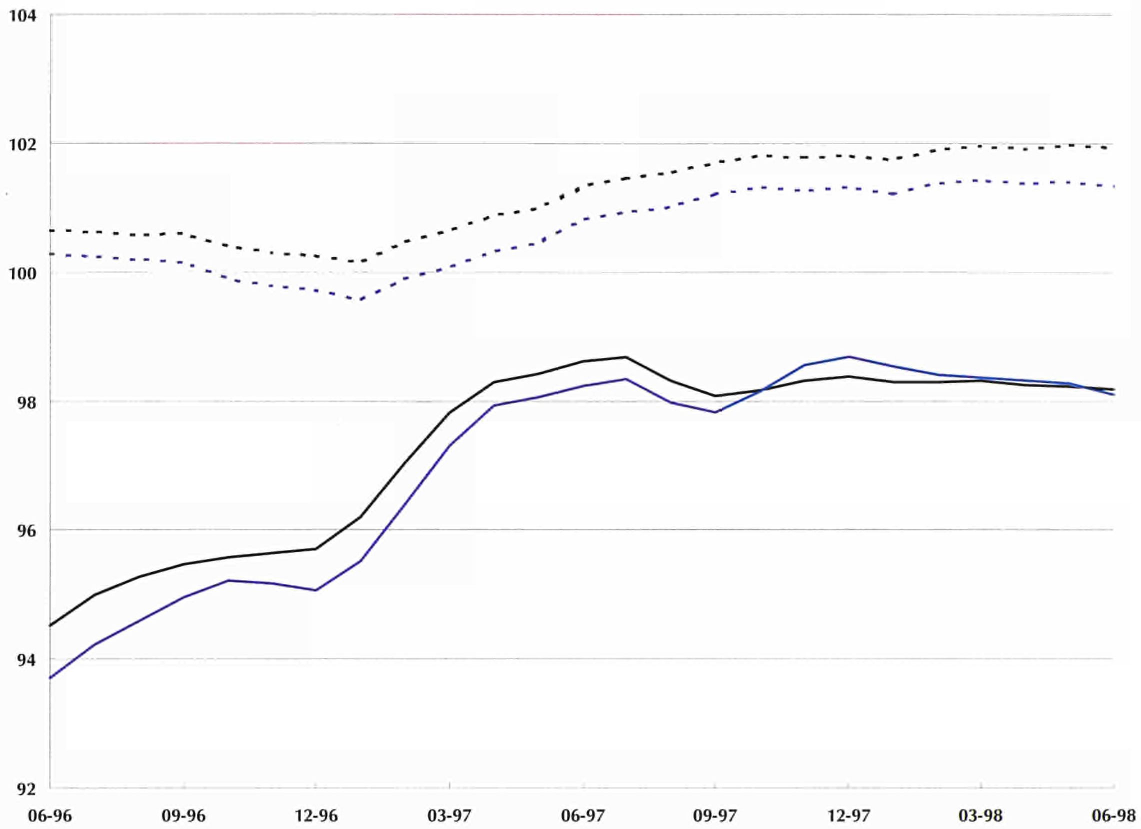
Extra EU-15 imports (million ECU)

	1993	t / t-1 (%)	1994	t / t-1 (%)	1995	t / t-1 (%)	1996	t / t-1 (%)	1997	t / t-1 (%)
EU-15	14,915	2.7	16,691	11.9	16,367	-1.9	17,125	4.6	20,385	19.0
B/L	881	17.3	1,240	40.8	1,239	-0.1	1,317	6.3	1,573	19.4
DK	267	-2.2	286	7.3	318	11.2	328	3.0	390	18.8
D	4,999	7.3	5,152	3.1	5,069	-1.6	5,158	1.8	5,660	9.7
EL	175	1.7	203	16.0	212	4.6	258	21.9	328	26.8
E	407	-31.1	522	28.2	570	9.0	568	-0.2	792	39.4
F	1,582	3.7	1,702	7.6	1,671	-1.8	1,618	-3.2	1,965	21.5
IRL	78	-24.5	78	-1.1	81	3.9	87	8.4	110	25.8
I	1,790	-8.7	2,343	30.9	2,300	-1.9	2,207	-4.0	2,869	30.0
NL	864	2.9	898	3.9	893	-0.5	960	7.5	1,157	20.5
A	517	6.1	559	8.2	428	-23.4	491	14.7	500	1.9
P	158	-7.3	204	28.9	240	17.7	246	2.5	292	18.8
FIN	132	-4.6	163	23.2	133	-18.6	147	10.7	166	13.1
S	420	-7.2	456	8.4	402	-11.8	427	6.3	517	21.0
UK	2,645	10.1	2,887	9.2	2,813	-2.6	3,313	17.8	4,068	22.8

Source: eurostat

Production (trend cycle) & producer price indices

Figure 4.9



Production and producer price indices (1995 = 100)

EU-15 production index

EU-15 producer price index

EUR-11 production index

EUR-11 producer price index

Source: eurostat

Table 4.7

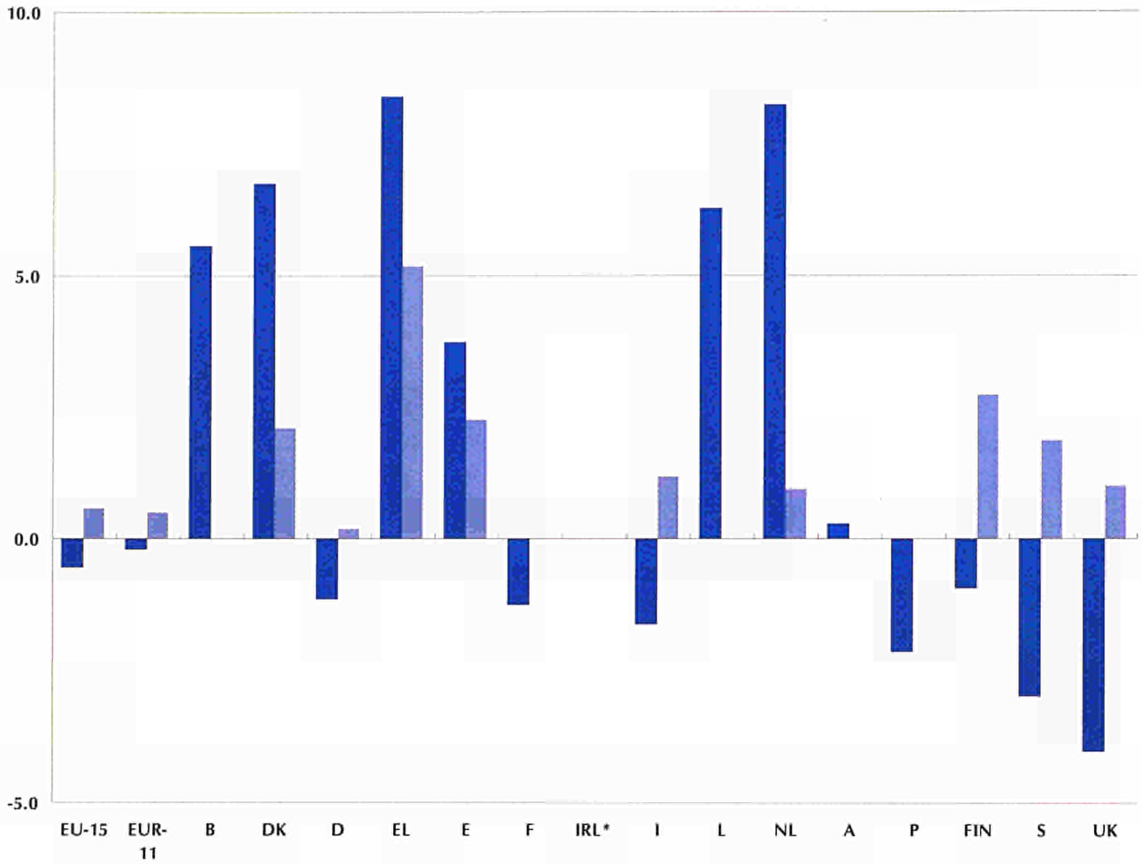
Production and producer price indices: growth rates (%)

	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	04-98	⇨	06-98	-0.1	-0.6	06-98	0.0	0.6
B	05-98	⇨	07-98	-1.3	0.4		:	:
DK	06-98	⇨	08-98	4.5	17.2	08-98	1.0	2.8
D	06-98	⇨	08-98	0.7	0.1	09-98	-0.1	-0.6
EL	06-98	⇨	08-98	:	3.8	06-98	2.7	5.2
E	04-98	⇨	06-98	3.3	3.7	06-98	0.9	2.3
F	06-98	⇨	08-98	-1.8	-3.5		:	:
IRL	03-97	⇨	05-97	1.9	6.7	09-97	-0.5	0.1
I	06-98	⇨	08-98	-1.8	-4.2	09-98	-0.1	0.6
L	06-98	⇨	08-98	:	-14.1		:	:
NL	05-98	⇨	07-98	0.2	8.4	09-98	0.0	0.9
A	05-98	⇨	07-98	:	3.3		:	:
P	06-98	⇨	08-98	:	-3.8	12-97	0.3	1.3
FIN	06-98	⇨	08-98	0.9	3.0	09-98	0.1	2.9
S	06-98	⇨	08-98	-2.0	-5.4	09-98	-0.2	0.9
UK	05-98	⇨	07-98	:	-5.2	09-98	-0.1	0.3
Japan	07-97	⇨	09-97	-1.3	-2.5		:	:
USA	11-97	⇨	01-98	1.4	4.7	01-98	-0.2	0.1

Source: eurostat

Figure 4.10

Production and producer price indices: growth rate, three months compared to the same three months of the previous year, 04-98 to 06-98 (%)

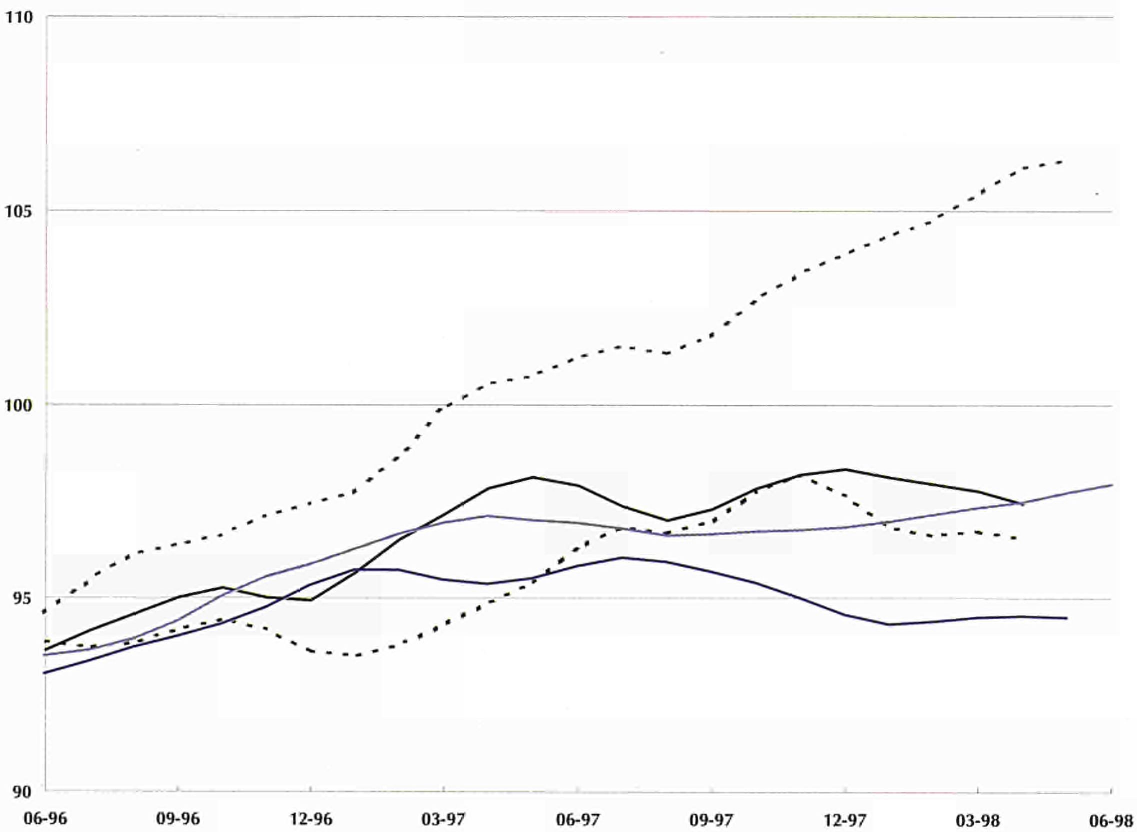


Production
Producer price index

Source: eurostat

Figure 4.11

EU-15 production index for individual groups, trend cycle (1995 = 100)

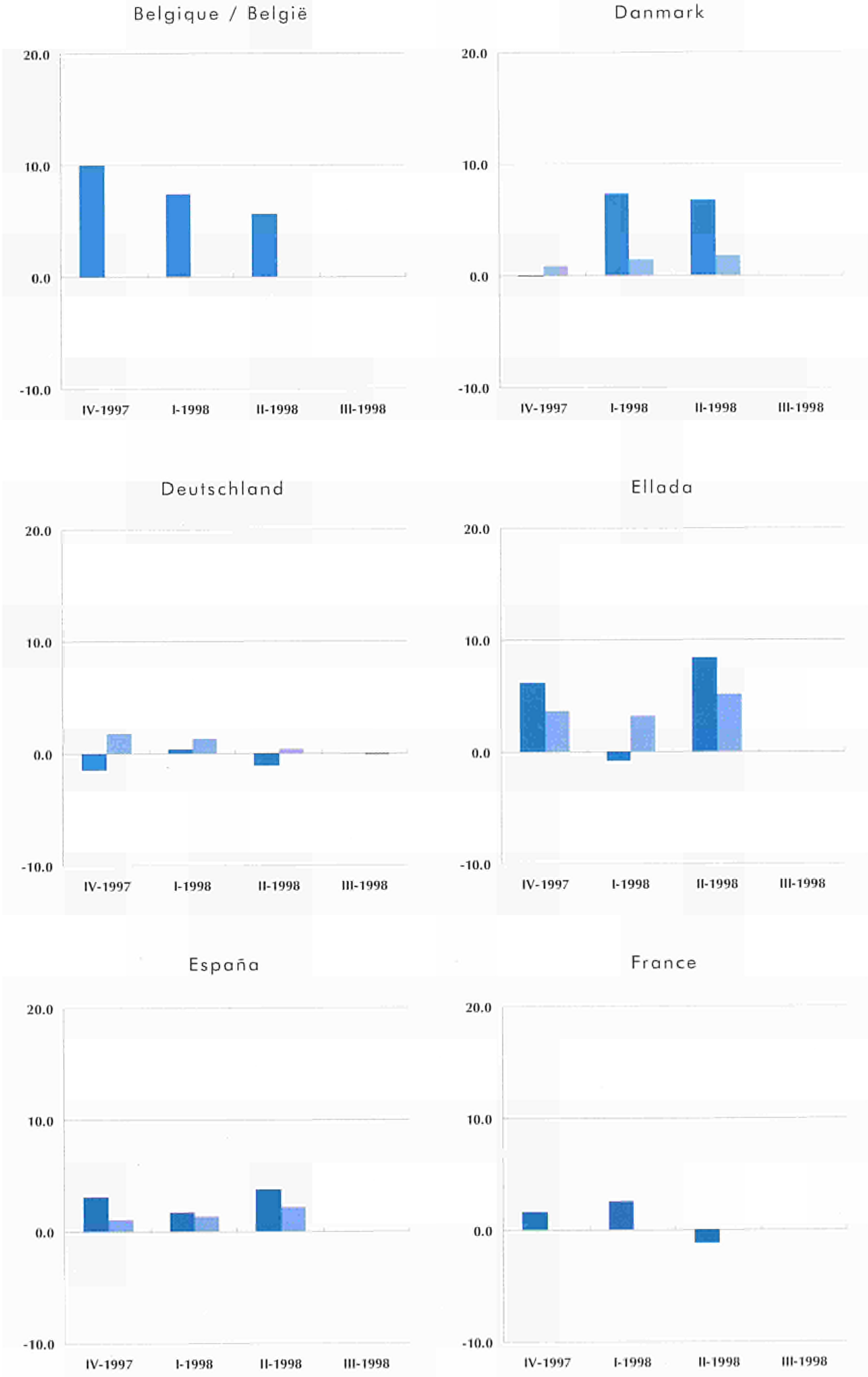


Preparation and spinning of textile fibres
Textile weaving
Finishing of textiles
Made-up textile articles
Other textiles

Source: eurostat

Figure 4.12

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



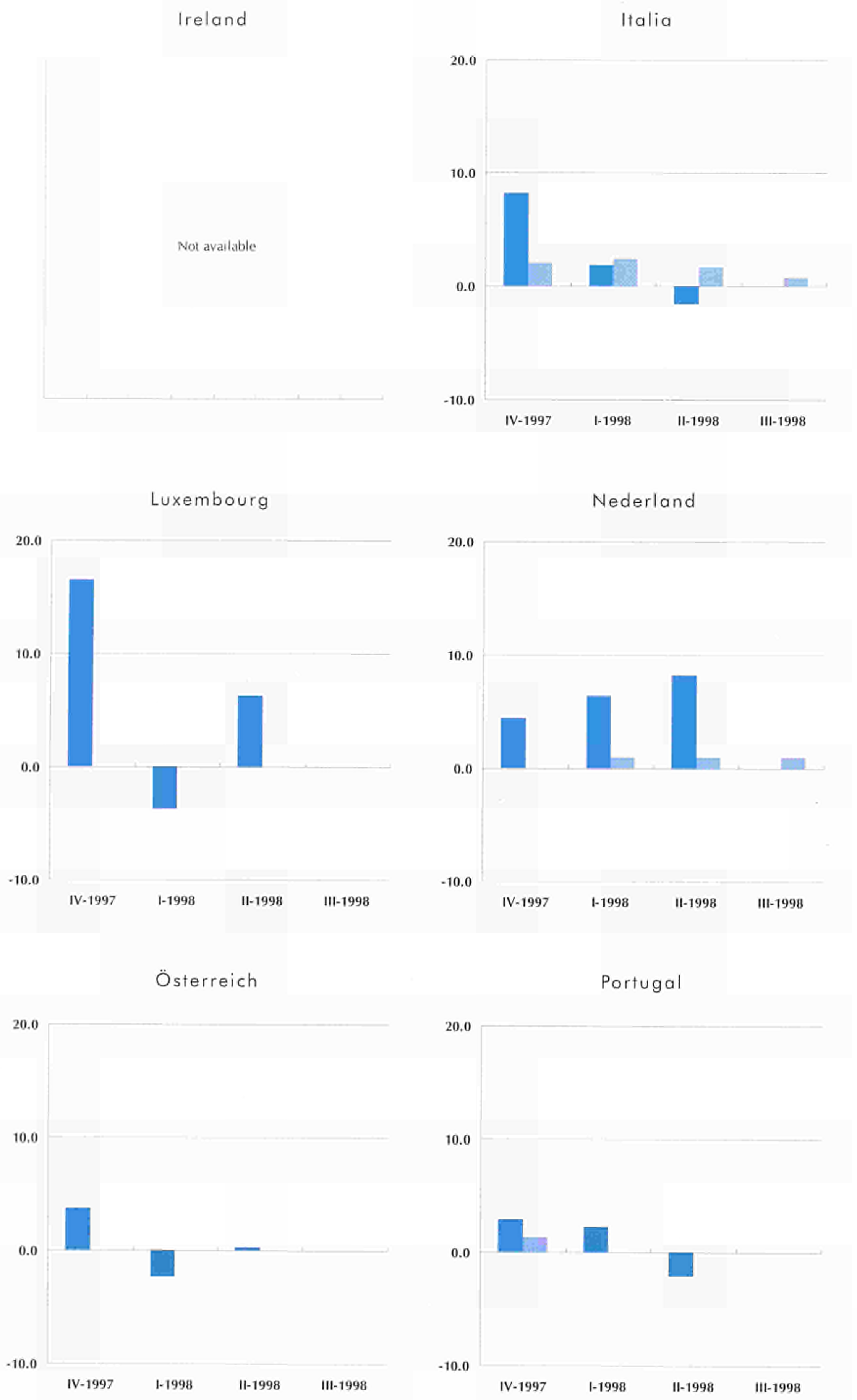
Production index

Producer price index

Source: eurostat

Figure 4.12

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



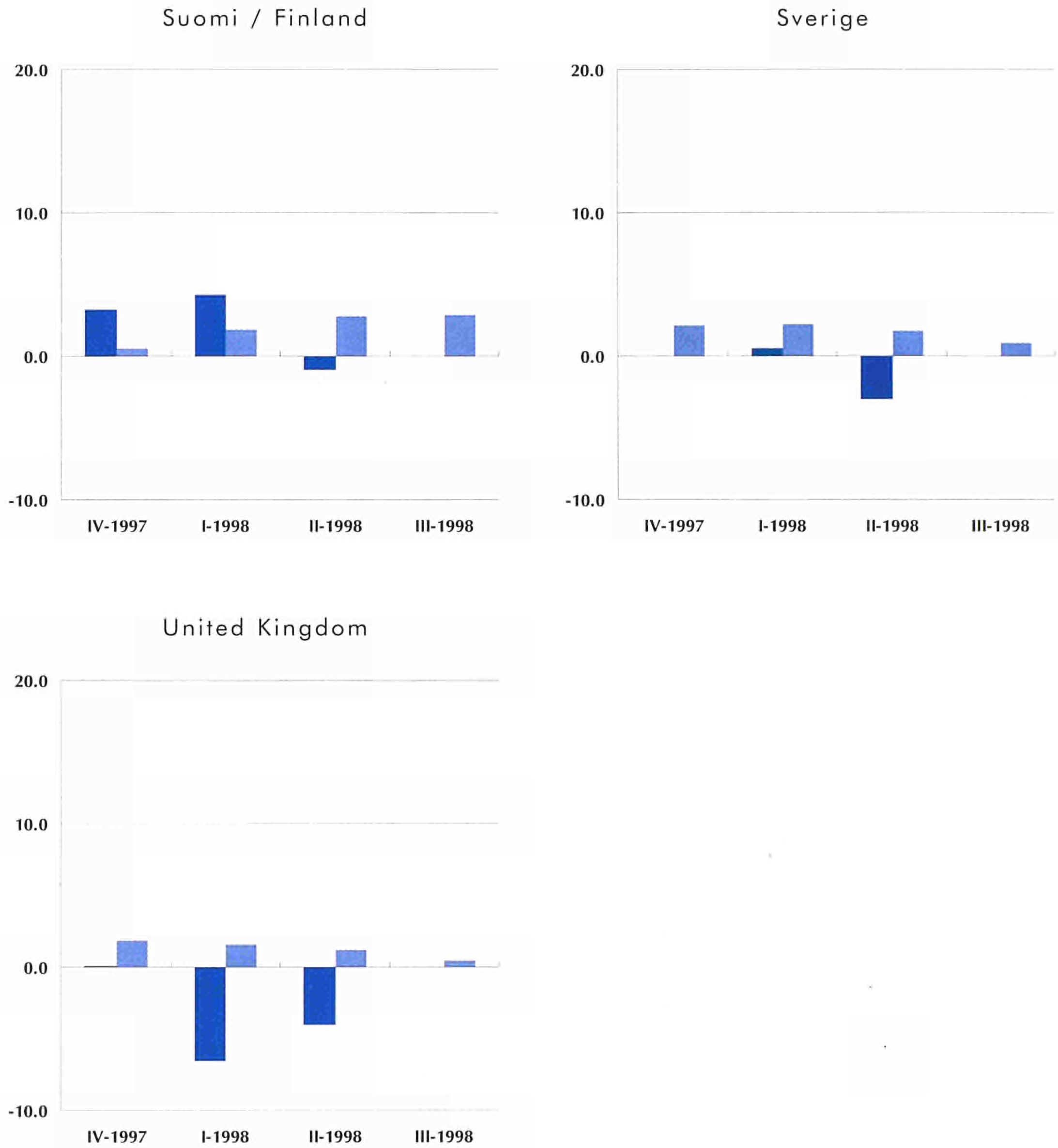
Production index

Producer price index

Source: eurostat

Figure 4.12

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



Production index

Producer price index

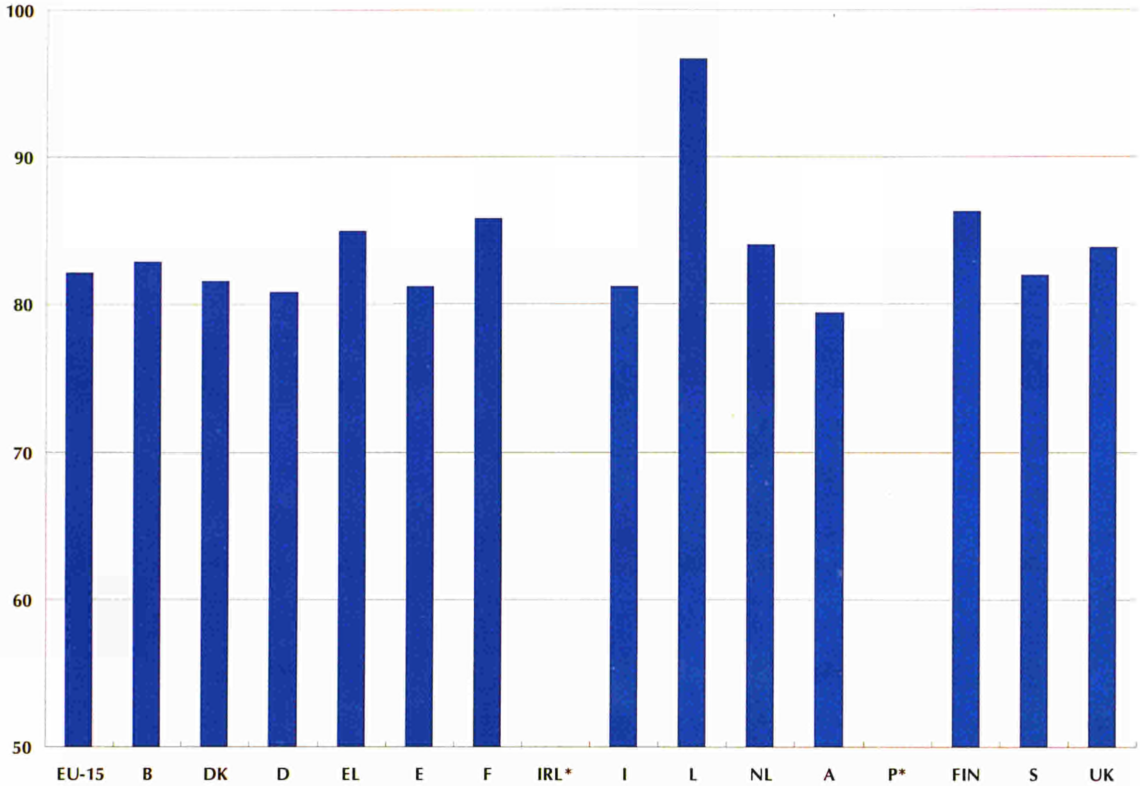
Further information - production and producer price indices:

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 89.

Source: eurostat

Figure 4.13

Capacity utilisation rates, 07-98 (%)



Source: DG II, Business Survey

Table 4.8

Capacity utilisation rates (%)

	Growth rate: latest month, t / t-12 (%)	10-97	01-98	04-98	07-98
EU-15	-0.7	83.0	82.4	81.2	82.2
B	0.1	84.2	82.5	81.3	83.0
DK	-2.9	77.0	80.7	76.2	81.6
D	-0.5	82.9	81.2	81.7	80.9
EL	-2.2	81.1	82.0	85.0	85.0
E	1.4	80.6	81.2	81.1	81.3
F	0.1	86.0	85.6	84.9	85.9
IRL	4.3	89.0	92.1	:	:
I	-0.2	81.7	82.3	79.4	81.3
L	-2.8	99.4	99.5	94.2	96.7
NL	-0.6	83.0	83.6	83.9	84.1
A	-0.1	80.1	79.2	81.2	79.5
P	3.4	77.6	80.2	:	:
FIN	-3.0	91.0	87.0	89.0	86.3
S	-1.2	:	82.0	84.0	82.0
UK	-4.6	87.0	81.9	81.7	83.9

Source: DG II, Business Survey

Foreign trade indices (trend cycle)

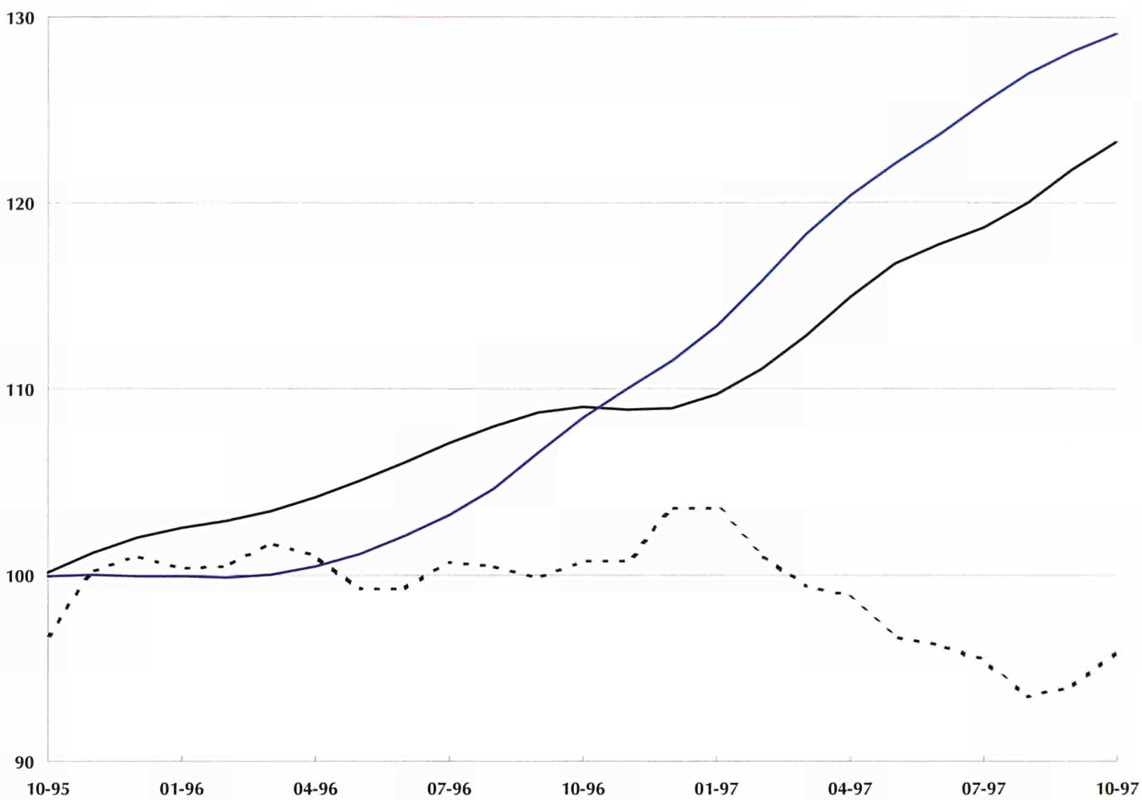


Figure 4.14

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

Source: eurostat

	Latest 3 months available			Exports Value	Exports Volume	Imports Value	Imports Volume	Terms of trade
EU-15	08-97	⇨	10-97	3.4	1.7	3.5	1.1	-1.7
B / L	09-97	⇨	11-97	-5.0	1.0	1.2	-0.4	-3.8
DK	09-97	⇨	11-97	2.9	0.5	3.9	0.9	12.8
D	07-97	⇨	09-97	2.1	0.1	2.0	0.5	-2.1
EL	07-97	⇨	09-97	0.3	-0.6	2.4	-0.6	2.3
E	09-97	⇨	11-97	7.0	3.7	5.6	3.0	1.5
F	09-97	⇨	11-97	2.5	1.4	2.8	3.1	1.0
IRL	08-97	⇨	10-97	-0.5	-1.5	1.3	-1.9	1.9
I	08-97	⇨	10-97	1.9	0.2	7.5	5.7	0.3
NL	08-97	⇨	10-97	0.1	-6.6	-0.4	-4.4	8.2
A		⇨		:	:	:	:	:
P	08-97	⇨	10-97	1.7	0.4	1.5	-1.2	0.2
FIN		⇨		:	:	:	:	:
S		⇨		:	:	:	:	:
UK	09-97	⇨	11-97	-2.0	-1.2	-0.1	-1.0	0.3

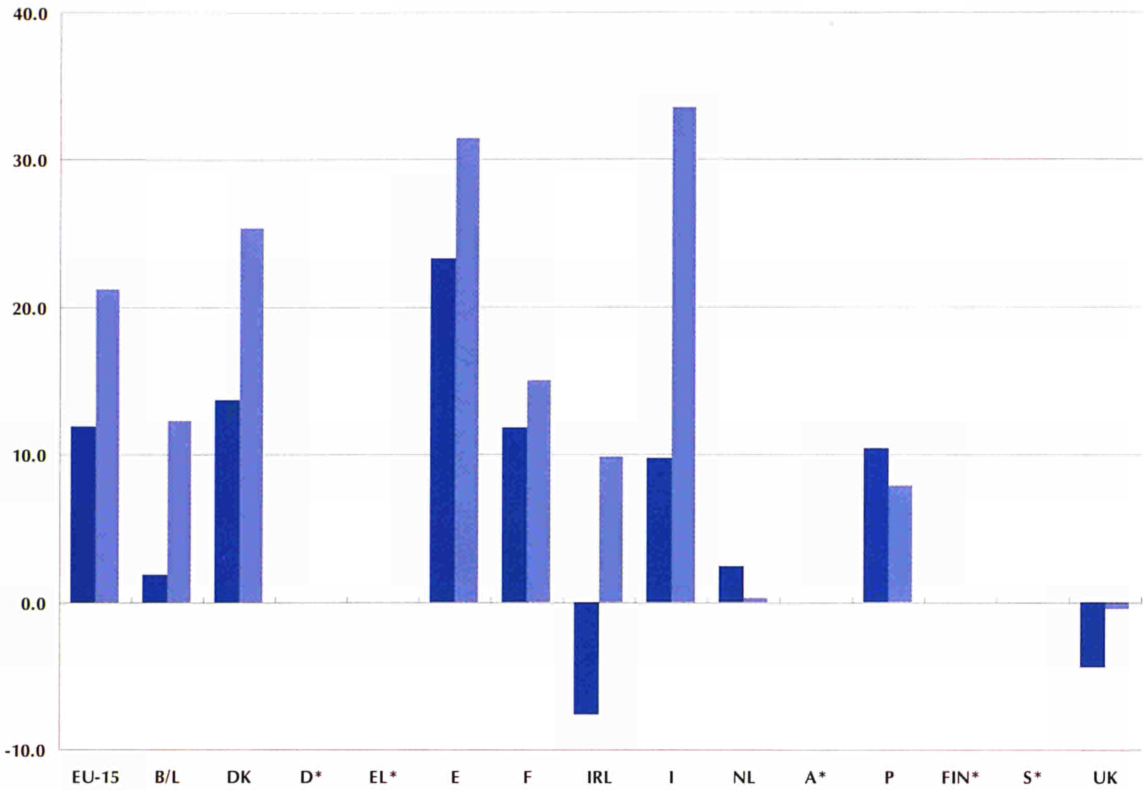
Table 4.9

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

Source: eurostat

Figure 4.15

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 4.10

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

	Latest 3 months available			Exports Value	Exports Volume	Imports Value	Imports Volume	Terms of trade
EU-15	08-97	⇨	10-97	11.9	7.2	21.2	9.3	-5.9
B / L	09-97	⇨	11-97	-5.0	-6.0	8.2	-1.3	-7.4
DK	09-97	⇨	11-97	20.6	-12.0	25.0	2.5	12.3
D	07-97	⇨	09-97	2.6	0.7	9.1	3.5	-3.4
EL	07-97	⇨	09-97	-4.3	-12.8	13.5	-1.3	-4.6
E	09-97	⇨	11-97	24.2	17.2	29.2	18.9	-2.5
F	09-97	⇨	11-97	12.7	10.2	15.5	10.7	-1.9
IRL	08-97	⇨	10-97	-7.6	-6.4	9.8	-0.1	-10.7
I	08-97	⇨	10-97	9.7	4.9	33.5	23.7	-3.3
NL	08-97	⇨	10-97	2.4	-13.4	0.2	-11.7	4.7
A		⇨		:	:	:	:	:
P	08-97	⇨	10-97	10.4	-1.5	7.9	-4.1	-1.0
FIN		⇨		:	:	:	:	:
S		⇨		:	:	:	:	:
UK	09-97	⇨	11-97	-4.2	-2.8	-2.0	-1.7	-1.2

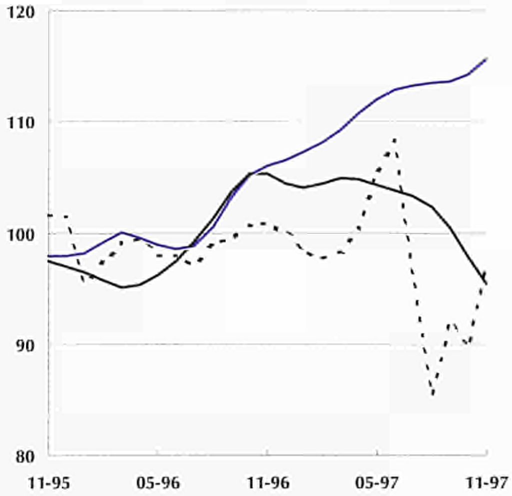
Source: eurostat

Foreign trade indices (trend cycle)

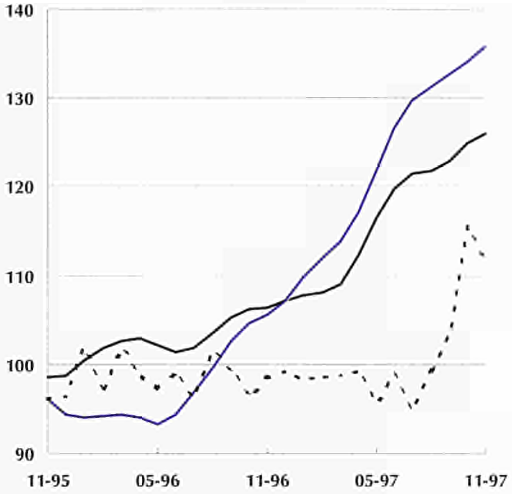
Figure 4.16

Foreign trade indices in ECU terms (1995 = 100)

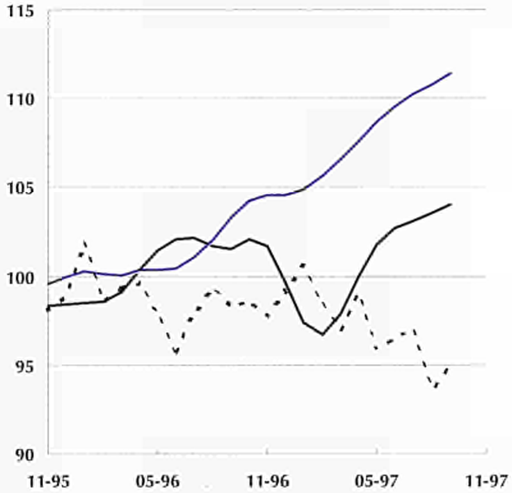
Belgique / België, Luxembourg



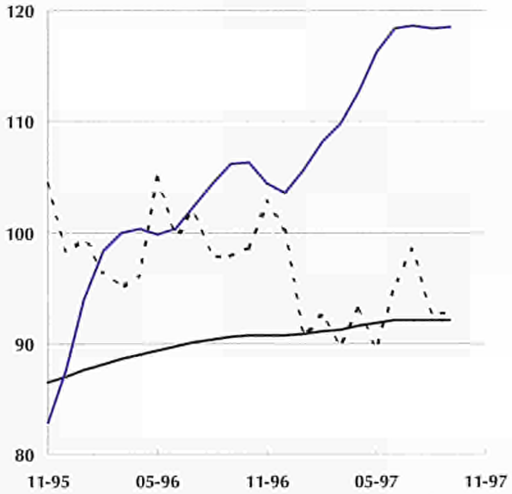
Danmark



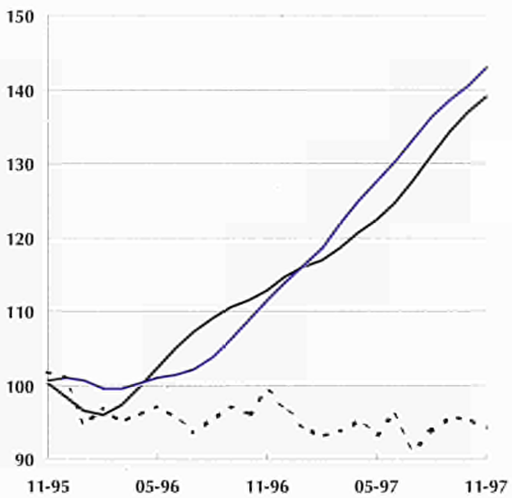
Deutschland



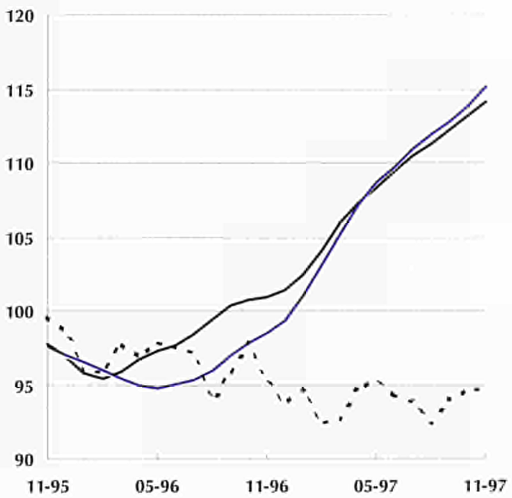
Ellada



España



France



Export value index

Import value index

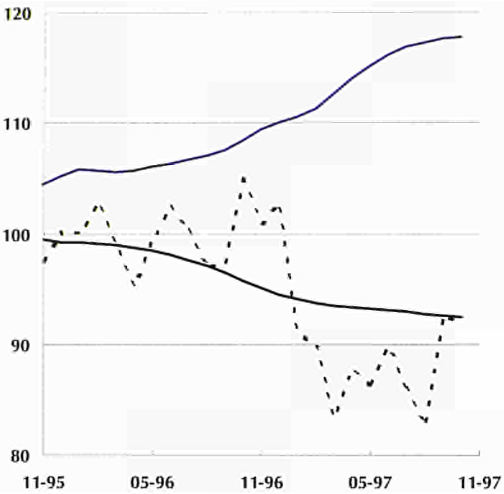
Terms of trade

Source: eurostat

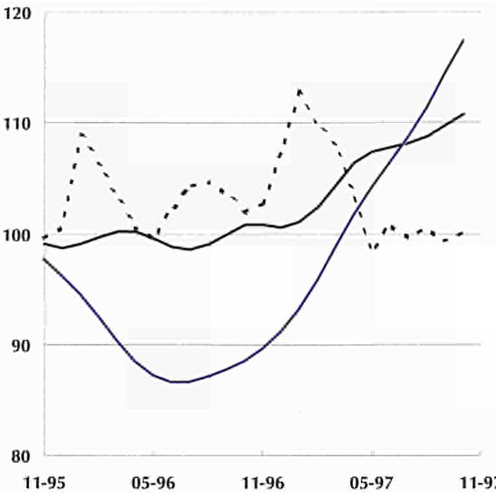
Figure 4.16

Foreign trade indices in ECU terms (1995 = 100)

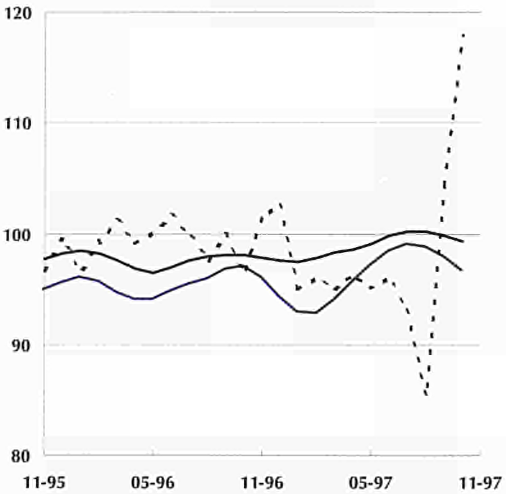
Ireland



Italia



Nederland



Österreich

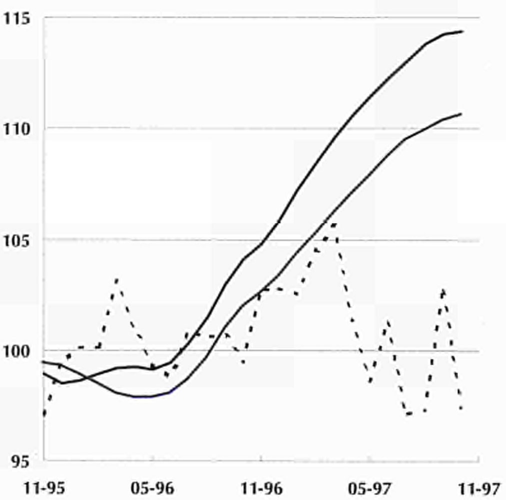
Not available

Export value index

Import value index

Terms of trade -----

Portugal



Suomi / Finland

Not available

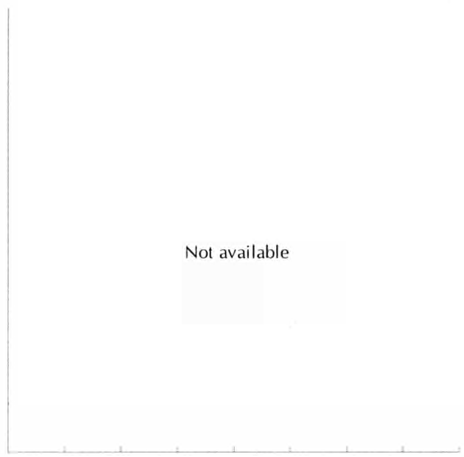
Source: eurostat

Foreign trade indices (trend cycle)

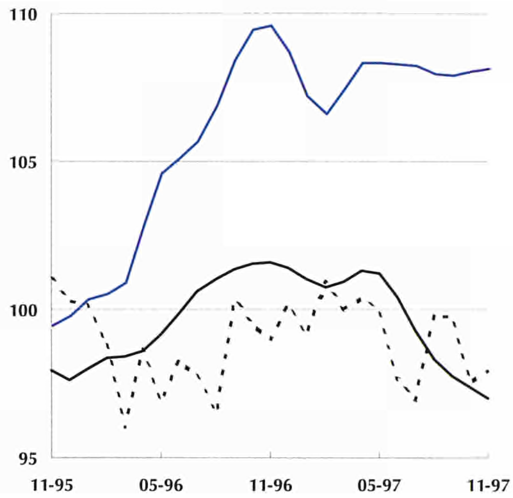
Figure 4.16

Foreign trade indices in ECU terms (1995 = 100)

Sverige



United Kingdom



Export value index

Import value index

Terms of trade

Further information - 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 89.

Source: eurostat

5. 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 4 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 Giuseppe Panbianco (giuseppe.panbianco@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

6. 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 made by 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 data 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 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 and graphs show three different growth rates. The first being for the latest three months data compared to the previous three months data (t/t-1) - 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 (t/t-4) - 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 (t/t-12) - here gross data for prices is used. Estimates are sometimes made to create a EU-15 or EUR-11 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 (where available). Growth rates are either one month compared to the same month of the previous year or three months compared to the same three months of the previous year. For Member States where just one month is missing (and not more), this missing value is 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 the data have been filled by estimates made by Eurostat. Thus, EU-15 and EUR-11 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

EUR-11	Monetary union participating countries
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

7. Subcontracting in the European Union: textiles and clothing industries

7. Subcontracting in the European Union: textiles and clothing industries

DESCRIPTION OF THE SURVEYS

The surveys of subcontracting in the textiles/clothing industry focused on 5 EU countries: Greece, Spain, France, Italy and Portugal.

All these surveys were based on a common definition and a common list of questions supplied by Eurostat. The information obtained in this way could therefore be used for international comparisons. The surveys in two of these five countries focused on a more precisely targeted population:

* in France, the survey focused exclusively on enterprises with fewer than 20 employees (and a national multisectoral inquiry, testing a new concept of industrial partnership, was carried out in parallel);
* in Italy, the survey focused only on subcontractors with 10-20 employees.

The surveys in the three other countries focused on a sample of enterprises in the textiles/clothing industry, without regard to size.

Sources of additional information:

A summary of the results of this study, aggregated at the level of the Community, were presented in "New Industrial Contracting in Europe - First results with an updated definition" - 1997 - Luxembourg - catalogue n° CA-01-96-139-EN-C

Surveys carried out in the course of this inquiry:

EL - Sympraxis S.A.
(carried out in 1995, covering contractors and subcontractors)
E - IMPI/CEAM
(carried out in 1995, covering contractors and subcontractors)
F - INSEE
(carried out in 1994, covering small contractors and subcontractors)
I - ISTAT
(carried out in 1995, covering small subcontractors)
P - INE
(carried out in 1995, covering contractors and subcontractors)

It should be noted that the definition of subcontracting in the textiles industry was different from the definition used in the survey of the clothing industry:

- for clothing, the following definition was adopted[1];
  - the customer participates in the conception of the product, even partially providing specifications to the manufacturer ranging from detailed technical plans to looser specifications;
  - the customer is responsible for selling the product;
- in the textiles sector, the purchase of the raw materials by the customer was regarded as an essential characteristic of a subcontracting relationship.

THE CONTRACTORS' VIEWPOINT

Survey methodology

The contractors who were questioned were selected from the business registers which were available for the sectors concerned[2]. Only contractors in the textiles/clothing industry were contacted. In the case of subcontractors, however, particularly in the case of knitwear and clothing, the inquiry revealed that the distributive trades sector could also be a major source of orders for enterprises in these industries.

In all five countries, a questionnaire was mailed to the potential contractors in the textiles/clothing industry. The response rates varied from country to country. It nevertheless proved possible, in the majority of cases, to identify at least 2 sub-groups, namely textiles and clothing.

1) This initial definition was amended in the light of the results of the statistical exercise.
2) ICAP (business register) of the Athens Chamber of Commerce and Industry; register of the Association of Exporters from Northern Greece (for Greece as a whole); BADASUB file (of the IMPI - Instituto de la Pequeña y Mediana Impresa Industrial) and sectoral yearbooks in Spain; SIRENE register in France; Register of the NAI (Nuevo Archivio delle Imprese) in Italy; Register of the annual structural survey in Portugal, restricted to the enterprises declaring themselves to be subcontractors in accordance with the definition used for this survey.

Table 7.1

Characteristics of contractors in the textiles industry (including the knitwear sector)[1]

	EL	E	F (2)	P (3)
Number of enterprises	97	35	1,315	:
enterprises with 0-19 employees	49	20	1,315	:
Number of employees	4,806	1,487	:	:
enterprises with 0-19 employees	431	76	:	:
Turnover (million ECU)	236	132	375	:
enterprises with 0-19 employees	24	12	375	:

1) Characteristics of the sample for Greece and Spain, extrapolation to the level of the whole population of enterprises in the textiles industry in France.
2) Limited to contractors with 0-19 employees.
3) Limited to enterprises in the knitwear sector, but no information on the composition of the sample was provided.

Source: eurostat

Table 7.2

Characteristics of contractors in the clothing industry[1]

	EL	E	F (2)	P (3)
Number of enterprises	137	50	3,274	:
enterprises with 0-19 employees	82	27	3,274	:
Number of employees	5,593	2,346	:	:
enterprises with 0-19 employees	772	179	:	:
Turnover (million ECU)	194	177	573	:
enterprises with 0-19 employees	45	19	573	:

1) Characteristics of the sample for Greece and Spain, extrapolation to the level of the whole population of enterprises in the clothing industry in France.
2) Limited to contractors with 0-19 employees.
3) Limited to enterprises in the knitwear sector, but no information on the composition of the sample was provided.

Source: eurostat

Table 7.3

Subcontracted purchases as a proportion of total purchases of contractors in the textiles/clothing industry (%)

	EL	E	F	P
Textiles	:	30	19	:
Knitwear	:	40	26	:
Clothing	:	41	28	:
Total	:	39	26	:

Source: eurostat

Table 7.4

Geographical breakdown of subcontracted purchases in the textiles industry (excluding knitwear) (%)

	EL	E	F (1)	P
Same region	73	92	89	:
Other region, same country	6	1	10	:
Other EU countries	21	7	1	:
Other extra-EU countries	0	0	:	:
Total	100	100	100	:

1) Differentiation between EU and extra-EU countries was not requested.

Source: eurostat

Characterisation of contractors

Before the presentation of the contractors' viewpoint, tables 7.1 and 7.2 provide basic information on the respondents by country (number of respondents, numbers of employees and cumulated turnover in millions of ECU).

The special nature of the French sample is clearly reflected in the two tables: average turnover per enterprise is low: the sample consists of small enterprises.

Proportion of subcontracting in contractors' purchases

As the surveys in Greece and Portugal concentrated on subcontractors, the proportion of subcontracting in contractors' purchases could be calculated for only two countries.

The proportions of subcontracting in France and Spain appear to be relatively compatible The differences between these two countries can be attributed to the fact that the inquiry in France was restricted to very small enterprises.

Geographical breakdown of subcontracted purchases

As the questionnaires prepared by the individual countries did not all use the same geographical breakdown, the tables are to be seen as a compromise between the analyses resulting from the various inquiries.

In general, the results of the study of the geographical origin of subcontracted purchases in the textiles/clothing industry confirm the thesis of the existence of subcontracting zones around the core locations of this industry. There are however, a few minor exceptions in the case of certain subsectors and certain countries.

Subcontracted purchases in the textiles industry are almost exclusively from enterprises in the contractor's own region. Greece is the exception in this respect, with 21% of purchases from subcontractors in other EU countries.

Subcontracted purchases in the knitwear industry are also highly concentrated in the contractor's own region. But the purchasing zone is rather more extensive than for textiles. In Greece, on the other hand, in contrast with the situation in the textiles industry, there were no reports of subcontracted purchases in other countries.

Generally speaking, subcontracted purchases in the clothing sector are also based on a network of subcontractors in the same region. In Spain, however, 14% of these purchases are from outside the country.

Table 7.5

Geographical breakdown of subcontracted purchases in the knitwear industry (%)

	EL	E	F (1)	P
Same region	79	82	86	100
Other region, same country	19	12	14	0
Other EU countries	0	5	0	0
Other extra-EU countries	2	1	0	0
Total	100	100	100	100

1) Differentiation between EU and extra-EU countries was not requested.

Source: eurostat

Table 7.6

Geographical breakdown of subcontracted purchases in the clothing industry (%)

	EL	E	F (1)	P
Same region	81	65	86	95
Other region, same country	13	21	11	5
Other EU countries	0	7	3	0
Other extra-EU countries	6	7	:	0
Total	100	100	100	100

1) Differentiation between EU and extra-EU countries was not requested.

Source: eurostat

THE SUBCONTRACTORS' VIEWPOINT

Survey methodology

The subcontractors questioned in this survey belonged exclusively to the textiles/clothing industry. Subcontractors in other industries, e.g. manufacturers of man-made fibres in the chemical industry, were not included. The potential respondents were selected from the various national business registers, and questionnaires were mailed to all of them.

The following analysis is based solely on the enterprises declaring themselves to be subcontractors in accordance with the definition we used for the surveys. The response rates varied from country to country, but the final results probably represent, in the main, the enterprises which are highly dependent on this type of economic relationship and consequently keener to respond to questions which directly concern them.

Characteristics of subcontractors

As in the case of contractors, two preliminary tables provide basic information on the respondents by country (number of respondents, numbers of employees and cumulated turnover in MECU).

Table 7.7 is a reminder that the surveys focused on different populations: the respondents in France and Italy were in the lower size categories.

Proportion of subcontracting in subcontractors' sales

The identification of the degree of interdependence between enterprises, particularly between small and large-scale enterprises, was one of the principal aims of the surveys carried out in the various European countries, and the proportion of subcontracting in subcontractors' turnover (in tandem with the proportion of subcontracting in contractors' purchases) was therefore a key variable of this inquiry.

Table 7.7

Characteristics of subcontractors in the textiles and clothing industries[1]

	EL	E	FR (2)	I (3)	P (4)
Number of enterprises	123	39	4,553	1,247	:
of which:					
- textiles (excluding knitwear)	42	19	1,540	510	:
enterprises with 0-19 employees	14	:	1,540	510	:
- clothing (including knitwear)	81	20	3,013	737	:
enterprises with 0-19 employees	28	:	3,013	737	:
Number of employees	7,593	:	22,687	17,189	:
enterprises with 0-19 employees	384	:	22,687	17,189	:
Turnover (million ECU)	175	:	942	667	:
enterprises with 0-19 employees	10	:	942	667	:

1) Characteristics of the sample, with the exception of France, for which there is an extrapolation to the level of the whole population of enterprises in these industries.
2) Enterprises with 0-19 employees.
3) Enterprises with 10-20 employees.
4) No information on the composition of the sample was provided.

Source: eurostat

It is important to remember, however, that this proportion was calculated only for subcontractors and cannot be regarded as applicable to the industry as a whole.

The results show that the subcontractors in the textiles/clothing industries are highly dependent on their main contractors: more that two thirds of their turnover is derived from subcontracting, except in the case of Portugal, where the levels indicated by the respondents were strikingly lower.

The results of this study warrant the conclusion that subcontracting is not just one of a number of modes of activity for these enterprises: it is probably the life-blood of their existence.

The figures also appear to confirm that the size of the enterprises questioned does not play a major role, because there is very little difference between the results obtained with the middle-of-the-range samples in Greece and Spain and those obtained in France and Italy where the surveys focused on small enterprises.

Geographical breakdown of subcontractors' sales

Our analysis of the geographical structure of subcontractors' sales revealed the existence of considerable differences between the sub-groups covered: there is a striking contrast between the textiles industry, in which most of the subcontracting work is done for a client in the same region, and the picture in the knitwear and clothing sector.

The contractors in the textiles industry are geographically close to their subcontractors: more than 3/4 belong to the same region, and nearly all are in the same country.

Hence the conclusion, in the light of a comparison with the results for the contractors in this same subgroup (table 7.4), that subcontracting in this case is not based on a strategy of internationalisation of

Table 7.8

Subcontracted sales as a proportion of total sales by subcontractors in the textiles/clothing industries (%)

	EL	E	F	I	P
Textiles (excluding knitwear)	56	75	54	68	:
Knitwear	49	70	74	79	45
Clothing	80	68	69	81	30
Total	68	71	72	77	35

Source: eurostat

Table 7.9

Geographical breakdown of subcontractors' sales in the textiles sector (excluding knitwear) (%)

	EL	E	F	I (1)	P
Same region	76	91	84	84	:
Other region, same country	24	9	14	14	:
Other EU countries	0	0	1	2	:
Other extra-EU countries	0	0	1	:	:
Total	100	100	100	100	:

1) Differentiation between EU and extra-EU countries was not requested.

Source: eurostat

Table 7.10

Geographical breakdown of subcontractors' sales in the knitwear sector (%)

	EL	E	F	I (1)	P
Same region	2	67	89	50	8
Other region, same country	2	31	11	19	0
Other EU countries	95	2	0	31	92
Other extra-EU countries	1	0	0	:	0
Total	100	100	100	100	100

1) Differentiation between EU and extra-EU countries was not requested.

Source: eurostat

specific stages of production. The determining factors seem to be the high level of transport costs in relation to the prices of the products in question or the need for quick delivery.

In the case of knitwear, on the other hand, as in that of clothing, as described above, the results reveal the existence of export flows from Portugal and Greece, mainly to other European countries. The lower levels of wage costs in these two countries give them a competitive advantage on the export front.

France would seem, for its part, to be following another philosophy: the clientele of subcontractors is almost exclusively regional.

Finally, the results for Spain and Italy are less clear-cut, with Italy appearing, however, to have a larger international clientele (31%).

The results for clothing are fairly closely comparable with those for knitwear. The propensity of contractors in Greece and Portugal to use subcontractors in other countries is somewhat less marked. Portugal is notable, in this context, for the existence of a relatively large extra-EU clientele (18%).

Table 7.11

Geographical breakdown of subcontractors' sales in the clothing sector (%)

	EL	E	F	I (1)	P
Same region	6	50	83	63	24
Other region, same country	11	22	13	27	2
Other EU countries	80	28	2	10	56
Other extra-EU countries	3	0	2	:	18
Total	100	100	100	100	100

1) Differentiation between EU and extra-EU countries was not requested.

Source: eurostat

Types of contractor

The clients of the subcontractors in the textiles and clothing industries do not all belong to the same industry. The nearer one gets to the end of the production chain (i.e. the product at its final stage), the more one can expect to find enterprises in the distributive trades sector among the contractors. In the clothing industry, for example, if we include the far from perfectly identified "other contractors", between 21 and 44% of the contractors in the different countries were in the distributive trades sector (retailers, chains, etc.) or service enterprises (designers) and not clothing manufacturers.

The typological distribution of contractors in the textile industry tallies closely with the same hypothesis. Except in the case of manufacture of textile articles, we are focusing here on an intermediate stage of production receiving their orders, therefore, from other manufacturing enterprises lower down the chain. These orders may come, in particular from clothing manufacturers.

In the case of Spain and France, the number of responses under the "others" heading is rather difficult to explain. It may be due to the subcontractors' unawareness of the identity of their customers and the exact nature of their activities.

In the case of knitwear, the breakdown of contractors varies rather considerably from country to country:

* in Portugal, the contractors are all industrial enterprises, and half of them belong to groups. Some of the subcontractors may be subsidiaries of European groups. Other results inform us, for example, that many of them have only one customer and that their equipment is used exclusively for the latter;
* in Italy, on the other hand, a small majority (51%) of subcontractors work for customers in the services sector;
* in Spain, the proportion of subcontractors working for this type of contractor in the knitwear sector is rather lower (only 36% of orders);

Table 7.12

Categories of subcontractors' customers in the textiles sector - excluding knitwear (% of subcontracted sales)

	EL (1)	E	F	I	P
Independent manufacturer	99	11	33	41	:
Industrial group (integrated)	:	5	6	18	:
Manufacturer-processor	:	43	26	19	:
Dealer	1	0	4	7	:
Hyper/supermarket	0	0	0	0	:
Retail stores	:	0	1	:	:
Mail-order enterprise	:	:	0	:	:
Department store	0	0	0	4	:
Designer/stylist	0	0	0	0	:
Small retailer	0	0	3	2	:
Others	0	41	27	9	:
Total	100	100	100	100	:

1) In the case of Greece, the breakdown relates to subcontractors in both the knitting and textiles sectors.

Source: eurostat

★ the orientation of French subcontractors, from this point of view, is similar to that of Portuguese subcontractors, but it has to be remembered that the figures relate solely to small enterprises.

In the clothing industry, the profiles of the different countries are closer than in the knitwear sector: the proportion of industrial contractors is between 79% (Spain) and 56% (Portugal).

Types of work

The results reveal a fairly close correlation between the main activity of the enterprise and the kinds of subcontracted work it does. In the case of the enterprises classified as working in the knitwear sector, knitting and crochet work account for the largest proportion of subcontracted work. Other important kinds of work which appear to be closely linked with this activity include cutting-out and clothes-making in France and finishing of fabrics in Portugal. And subcontractors working in one part of the chain frequently work in another.

The data on the following point will also show that subcontractors are frequently dependent on the orders of a single contractor and highlight the fact that subcontracting is a fundamental structural feature of this industry populated by enterprises which seem to be entirely committed to this type of industrial relationship.

In Spain, where the activities on this front are highly diversified, (but evaluated on the basis of turnover, which possibly gives an idea of the structures which exist in the other countries concerned), the work of a large majority of the subcontractors in the clothing industry consists not only in clothes-making, at the very least, but also of other phases of the production process.

The "weight" of the main contractor

The question of the proportion of subcontracted sales represented by the orders placed by the main contractor is of vital importance, in view of the contribution of subcontracting to the total sales of the enterprise. The higher this ratio the greater the probability that the subcontractor will appear to be dependent on that contractor, and hence more fragile.

Except in Greece, the majority of subcontractors depend on a single contractor for at least 50% of their turnover. But the average percentage depends on the relative "weight" of the large enterprises in each category of turnover. The results show, moreover, that the number of enterprises in the highest category (in which subcontracting accounts for more than 80% of turnover) is highest in France and Italy, where the study was limited to small enterprises.

Compared with the results for knitwear and clothing, however, those for the textiles industry bear witness to a proportionally lower, albeit still substantial, degree of dependence on the main contractor. In the textiles industry, many subcontractors offer a speciality to their contractors, who are more numerous. Although the average size of main contractors is not very different, except in the case of Greece, where the opposite applies in this context, with the breakdown clearly revealing a much larger number of enterprises depending on a smaller number of contractors. These results lend credence to the idea that the subcontractors in Greece and Portugal may well be working for a group: on the evidence of the score attained by the "over 80%" category, many enterprises seem to have only a single contractor who is, moreover, outside the country. This could be an intra-European-group relationship. Compared with the knitwear industry, the average size of the main contractor in the clothing industry tends to be higher in the countries (Spain, France and Italy) in which the surveys reveal the application of the principles of quick reaction and flexibility, and lower in the two countries (Spain and Portugal) in which a cost-based logic prevails. The difference is therefore less pronounced. The size of the "over 80%" category is strikingly large in every country, however. The reasons for subcontracting may be different, but the dependence of subcontractors on their main contractors is everywhere very high. In every country, fewer than a quarter of subcontractors owe less than a quarter of their turnover to their main contractor.

Table 7.13

Subcontracted sales to main contractors as a proportion of total sales by subcontractors in the textiles industry - excluding knitwear (%)

	EL	E (1)	F	I	P
Average proportion represented by the main contractor	26	63	50	68	:
breakdown of enterprises by weight of main contractors					
under 30%	52	29	34	9	:
30-49%	23	14	6	20	:
50-79%	21	43	14	22	:
over 80%	4	14	46	49	:
Total	100	100	100	100	:

1) Proportion represented by the top three contractors.

Source: eurostat

RELATIONS BETWEEN CONTRACTORS AND SUBCONTRACTORS

The answers to a few of the questions put to subcontractors in the course of the pilot studies provide an initial insight into the relationship between contractors and subcontractors with regard to such matters as contracts, financing, equipment, etc.

Time taken to pay

In view of the heavy dependence of subcontractors on their contractors, and frequently on one contractor in particular, it is important to evaluate the resulting levels of financial dependence. The questionnaires, except for those used in Italy, contained a question on payment periods, with the aim of identifying the financial risks incurred by these subcontractors.

Time taken to pay appears to be inversely proportional to the closeness of the relationship between contractors and subcontractors. Payment is quicker in the knitwear and clothing industry, where dependence seems to be greatest, than in the textiles industry, where the customers are more widely scattered.

Existence of a written contract

The signature of an written contract between the contractor and the subcontractor is not the usual practice in this industry.

The results show, however, that the proportion of written contracts is higher in the two countries (Greece and Portugal) in which the subcontractors work mainly for customers in other countries. It must not be forgotten, on the other hand, that the main contractor of many subcontractors in this industry is large enough to ensure that such a contract is not considered to be necessary.

The results appear to confirm the existence of two types of subcontracting, one with a rather formal structure, with international relationships, and another which is more local, with more informal relationships.

Table 7.14

Payment periods for subcontractors in the textiles sector - excluding knitwear (% of the number of subcontractors)

	EL	E	F	I	P
30 days	1	25	34	:	:
60 days	10	13	45	:	:
90 days	53	62	21	:	:
120 days	36	0	0	:	:
Total	100	100	100	:	:

Source: eurostat

Table 7.15

Percentages of subcontractors using equipment exclusively for a specific customer (% of the number of subcontractors)

	EL	E	F	I	P
Textile (excluding knitwear)	18	13	27	19	:
Knitwear	56	30	37	17	100
Clothing	36	57	26	22	75

Source: eurostat

Table 7.16

Average completion periods (days)

	EL	E	F	I	P
Textile (excluding knitwear)	15	17	17	35	:
Knitwear	24	42	18	16	28
Clothing	27	15	18	24	35

Source: eurostat

Table 7.17

Position of the products manufactured by subcontractors in the range of products of the textiles industry - excluding knitwear (% of the number of subcontractors)

	EL	E	F	I	P
Top-of-the-range	68	56	29	26	:
Middle-of-the-range	32	44	65	75	:
Bottom-of-the-range	0	0	6	8	:

Source: eurostat

Equipment used exclusively for one customer

Among the ways in which a subcontractor can be linked with his contractor, the questionnaire used for the European surveys highlighted the existence, on the premises of the subcontractor, of equipment for the exclusive use of a contractor.

The frequency of exclusive use of equipment for a single contractor differs between the industries covered and the five countries concerned. It seems to be most frequent in the knitwear and clothing industry, and more frequent also in Greece and Portugal. Its characteristics are therefore more or less the same as those of the existence of contracts.

Completion periods

The duration of the completion period was used as an indicator of the relative performance of the different enterprises. It also facilitated the identification of the reasons for subcontracting in the countries studied.

The results clearly reveal that completion periods in the clothing industry are considerably shorter in Spain and France (reflecting the application of the criterion of quick reaction) than in Greece and Portugal (reflecting the application of the cost criterion). In the case of Italy, the results are between these two extremes. In the textiles industry, on the other hand, the completion periods in Italy are almost twice as long as in the other European countries. Finally, in the case of Spain, the logic of quick reaction does not seem to apply to the knitwear industry, whereas the other countries appear to apply the same logic in both the knitwear and clothing sectors.

Types of know-how provided by subcontractors

On the evidence of the profiles described above, subcontracting in the textiles industry is more frequently based on access to the specialist know-how of subcontractors than in the other two sub-groups: the proportion of orders from the main contractor is lower, the work done by the subcontractors is more diverse, and very little equipment is installed for the exclusive use of a single contractor. The question on the type of know-how the subcontractors can offer their contractors could therefore confirm or invalidate this hypothesis.

The responses to this question fell under two different headings: know-how with regard to a function in the production process and know-how with regard to a category of products, but the two responses could also be given together. So the percentages cannot be aggregated.

These results are further evidence that the structure of subcontracting in the knitwear and clothing industry is not the same as in the other participating countries: there is more specialisation on a type of product than on a function. But specialisation on a function, even if it is stronger than specialisation on a product, does not appear to characterise a difference between subcontracting in the textiles industry and subcontracting in the clothing industry, where it is equally strong.

Position of the products manufactured by subcontractors in the range of products manufactured by the contractor

The surveys made an attempt to obtain information on this subject. But the question involved a highly subjective response and carried the risk of dissuading the entrepreneur from participating in the survey.

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