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This seventh issue of the Monthly Panorama of European Business is the last issue before the summer break. Issue 8/9 will be released during September, after which the normal monthly release will continue until the end of the year.

This issue concentrates on two of the smaller industries within the European Union, namely those of clothing and leather (NACE Rev. 1 18 and 19) and the non-metallic minerals industry (NACE Rev. 1 26). Both of these industries have come under increasing pressure from imports that originate from low labour cost countries such as Eastern Europe south-east Asia. This trend has been of particular significance in the clothing industry.

Clothing and leather accounted for about 2.5% of total EU manufacturing output in 1998, the share of this industry in EU production has been declining in recent years and most of the Member States report a reduction in levels of activity. The leather industry in particular is concentrated within the southern Member States of the Union, with Portugal and Italy particularly specialised.

Non-metallic minerals are due to the nature of the products usually destined for markets close to the production process. This is particularly the case in the production of non-metallic minerals to be used by the construction industry, where local materials usually form the basis for the construction of dwellings. Other markets that are more consumer-orientated, such as glassware and ceramics have come under pressure in low-cost areas. Nevertheless, many ceramics and glass producers have, by migrating to high value-added products, maintained their competitiveness and created niche markets for their output. Non-metallic minerals accounted for some 3% of total EU manufacturing.

Pedro Díaz Muñoz,
Luxembourg

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The Monthly Panorama of European Business has the objective of furnishing readers with an instrument which will allow them to follow the evolution of short-term trends and also show the structure and activity of European business. The publication appears eleven times during the year. When the occasion warrants topical articles may well be treated in the form of a special edition.

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Next issue:
Basic metals and fabricated metal products
Other manufacturing

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1. Industrial commentary

1. Industrial commentary

Latest trends in output in the EU

EU-15 production for total industry declined by 0.3% in the three months to April 1999 (when compared to the previous three-month period). If we compare this rate of growth to the changes observed at the start of 1999, we see there has been a general improvement in the index of production (although moderate negative rates were still being recorded). In February 1999 industrial production was falling by 0.6%, since when the rate of decrease has been reduced in successive months. Industrial production within the euro-zone[1] declined by 0.3% in April 1999 (using the same measure).

Looking in more detail at the performance of the main industrial groupings we find that there was positive growth for just one of the four main industrial groupings in the EU. Consumer non-durables saw output expand by 0.2% in the three-month period to April 1999. Intermediate goods reported the largest negative rate of change, down by 0.5%, whilst capital goods and consumer durables reported moderate declines of 0.1% or less. For the euro-zone, the figures showed less fluctuation between the four industrial groupings with the following latest rates of change: intermediate goods (-0.4%), capital goods (-0.3%), consumer durables (-0.1%) and consumer non-durables (0.1%).

Looking at the trend of the four industrial groupings over the past two years we see that there was rapid growth in the capital goods industry through until the final quarter of 1998, since when production has stagnated. Within consumer durables growth was slightly less spectacular during 1998, however there has been uninterrupted positive growth for this industrial grouping. There has been little change in the output of the consumer non-durables industry during the past two years.

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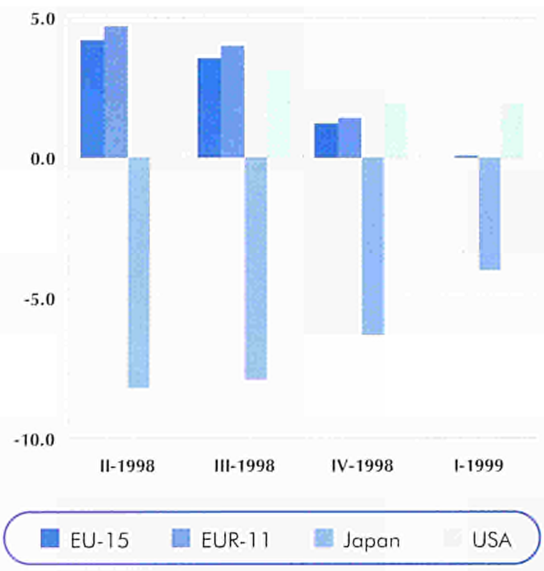
(1) Belgium, Germany, Spain, France, Ireland, Italy, Luxembourg, the Netherlands, Austria, Portugal and Finland make up the EUR-11 aggregate, otherwise known as the euro-zone.

Industrial output in the EU down by 0.3% in April 1999

Figure 1.1



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

Source: eurostat

Output in the Member States

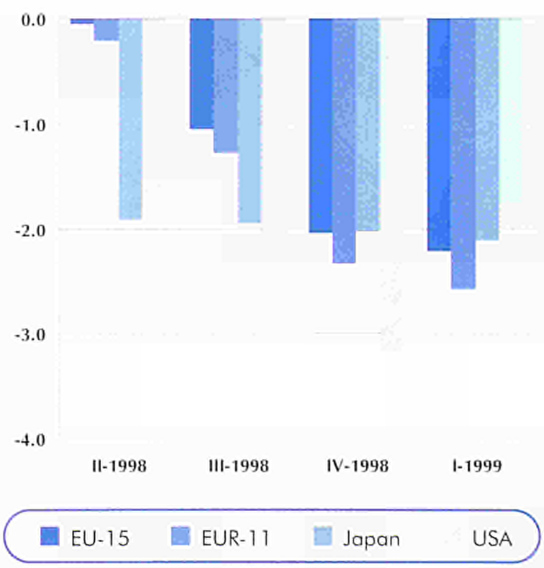
In Germany the latest data showed that industrial production fell by 1.0% in the three months to April 1999 (similar rates of change had been recorded in February and March of 1999). There would hence appear to be little change in the current state of German industry. The French index of industrial production rose by 0.2% in the three months to April 1999. This was the first month that French industry recorded positive rates of change, following a moderate decline of 0.1% in February 1999. In Italy the production index fell by 0.3% (again in April 1999). This reduction was a considerable improvement on the figures that were being recorded at the start of the year (-0.9% in January 1999). In the United Kingdom there was a moderate expansion in activity. Latest figures for April 1999 reported that total industry expanded by 0.2% (compared to a reduction of 0.3% in March 1999).

Growth in production was highest in Austria and Finland, where total industry was expanding by 2.7% and 2.1% during the three months to March and April 1999. Ireland reported the next highest levels of expansion with total industry growing by 1.5% in the three months to March 1999. Indeed, with the exception of Belgium, all other Member States reported moderate positive growth for total industrial production (the latest data available varied between December and April according to the country studied).

Changes in production compared to a year before

If we turn away from the short-term evolution of the production index (as measured by the change of the last three months compared to the previous three months) we may study the changes in the production index compared to a year before. We find that the pace of increase of output has slowed consider-

Figure 1.2



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

Source: eurostat

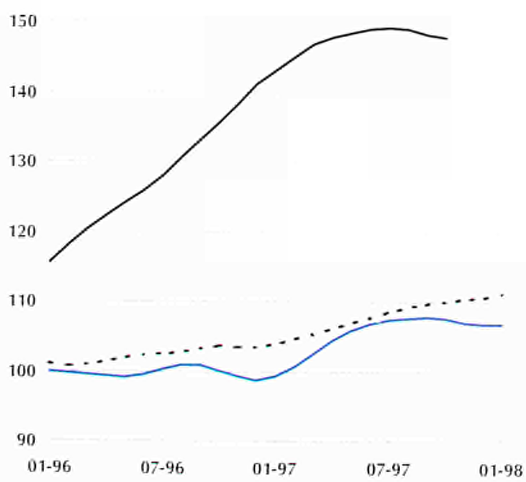
ably over the last year in Europe. Back in May 1998, the annual rate of growth of the production index was equal to 5.9% in the EU and to 6.9% for the EUR-11 aggregate. These rates of increase slowed at a rapid pace during the remainder of 1998 and by the turn of the year (January 1999) growth in output (using this measure) was recording positive gains of around 1%. This slow down in activity has subsequently continued and the latest figures for April 1999 report that the EU's production index was falling by 0.7% (with respect to data from a year earlier). The most pronounced reduction at the European level was recorded in the activity of intermediate goods, where EU-15 output fell by 1.9%. Positive growth was maintained in the capital goods industry where output rose by 1.1% to April 1999. Looking at the EUR-11 aggregate we find that intermediate goods also reported the largest decline in activity (down by 1.6% to April 1999), whilst the activity of capital goods was the only one of the four main industrial groupings to post positive figures (growth of 0.6% to April 1999).

Producer prices fall by 1.2% in the EU in May 1999

If we compare this slowdown in activity seen in Europe with the trends for Japan and the USA, we find that the European figures displayed a similar yet more pronounced reduction than the American data. In the USA despite a slowdown in activity (compared to growth rates from early 1998), positive growth was still recorded in early 1999, which has since quickened again. Indeed, apart from the activity of consumer non-durables, the other three main industrial groupings all posted positive rates of growth, rising to as high as 6.1% per annum for consumer durables. In Japan a completely different trend was observed over the last year. Whilst the latest data in Japan still reports negative rates of change, the rate of change has slowed somewhat over the last twelve months. During the summer of 1998, output in Japan was declining by almost 10% per annum, the latest data for April 1999 showed that industrial production was declining by 2.0%. Consumer non-durables recorded positive rates of change compared to a year before, up by 2.1%.

Figure 1.3

New orders index (1995 = 100)



Source: eurostat

Table 1.1

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

	EU-15	EUR-11	Japan	USA
05-98	5.9	6.9	-9.5	5.3
06-98	3.5	3.6	-8.3	3.5
07-98	4.0	4.4	-8.8	3.3
08-98	4.1	4.3	-8.3	3.7
09-98	2.9	3.4	-6.8	2.5
10-98	2.1	2.5	-6.9	2.6
11-98	1.7	1.9	-6.1	1.7
12-98	-0.2	-0.3	-6.0	1.6
01-99	0.9	1.1	-6.8	1.9
02-99	-0.6	-0.6	-3.7	2.2
03-99	-0.2	-0.2	-1.9	1.9
04-99	-0.7	-0.6	-2.0	2.6

Source: eurostat

Producer prices continue to fall

There would appear to be little inflationary pressure as producer prices in all three Triad economies continue to fall (as measured in national currency terms). In the EU the latest data for May 1999 reported that industrial producer prices for the EU-15 fell by 1.2% when compared to the same month of a year before, whilst figures for EUR-11 showed a decline of 1.4% (also to May 1999). The 1.2% reduction of EU producer prices in May 1999 was similar to the latest figure in the USA (down 1.1% in April 1999). The latest figure in Japan showed that prices were falling by 1.9% during the year to April 1999.

Indeed, there has been a great deal of symmetry between data for all three Triad members if we compare the rate of change of producer prices over the last two years. During 1997 both the EU and Japan reported that producer prices were growing at a moderate pace, peaking in August 1997. Between August 1997 and the start of 1999, the growth of prices was reduced in successive months, turning negative in the late spring of 1998. The negative trend was amplified through until early 1999, when it appears a turning point occurred. In the USA the largest negative changes were recorded in November 1998. Since these dates there has been a gradual movement in price changes, moving towards stable prices. This symmetry in the evolution of producer price changes is evident for the vast majority of European Member States too. Greece, Ireland, Luxembourg and the United Kingdom were the countries that diverged the most from the general trend in the last two years. In Greece and Luxembourg producer price changes have remained positive throughout the period (whilst generally slowing), whereas in Ireland and the United Kingdom there has been almost no change in producer prices during the past two years, with growth rates fluctuating within the band of +/-1%.

If we look more closely at the main industrial groupings we see that the main reason for declining prices within Europe was intermediate goods, the only one of the four industrial groupings to report a negative rate of change (down by 2.7% in May 1999). Figures for the other three industrial groupings showed barely positive growth; capital goods (0.1%), consumer durables (0.1%) and consumer non-durables (0.0%). Similar trends were seen for the EUR-11 aggregate, with total industry reporting a decline in prices of 1.4% in May 1999, whilst in intermediate goods the reduction was equal to 2.8%.

The latest data available for the Member States showed that price reductions were slowing rapidly. For example, in Portugal producer prices were declining by as much as 7.4% in January 1999, whilst the latest data for April 1999 reported a reduction of just 2.4%. Similar though less pronounced developments were taking place in the majority of the Member States. The largest reductions for the total industry aggregate were recorded in Finland (down by 2.8% in the year to May 1999). For the four largest EU economies the latest rates of change were (for May 1999): France (-1.1%), Germany (-1.7%), Italy (-1.4%) and the United Kingdom (0.0%).

2. Latest outlook: 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	Retail trade
EU-15	02-99 ⇨ 04-99	:	→	→	→	:	↗
EUR-11	02-99 ⇨ 04-99	:	→	→	:	:	↗
B	02-99 ⇨ 04-99	:	↘	→	↗↗	:	:
DK	03-99 ⇨ 05-99	:	→	↗	↘	↗	:
D	02-99 ⇨ 04-99	:	↘	→	→	↗	→
EL	02-99 ⇨ 04-99	:	↗	:	↗	:	:
E	02-99 ⇨ 04-99	:	→	→	↘	:	→
F	02-99 ⇨ 04-99	:	→	↗	↗	:	↗
IRL	01-99 ⇨ 03-99	:	↗	:	↘↘	:	↗↗
I	02-99 ⇨ 04-99	:	→	→	→	:	↗
L	10-98 ⇨ 12-98	↗	↗	↘	↘	:	↗
NL	03-99 ⇨ 05-99	:	↗	→	↗	→	↗
A	01-99 ⇨ 03-99	:	↗↗	:	↘↘	:	→
P	02-99 ⇨ 04-99	:	↗	→	↘	:	:
FIN	02-99 ⇨ 04-99	:	↗	→	↗	:	:
S	02-99 ⇨ 04-99	:	→	→	↘	:	↗
UK	03-99 ⇨ 05-99	:	→	↘	→	↘↘	:
NO	12-98 ⇨ 02-99	:	→	:	:	:	:
Japan	02-99 ⇨ 04-99	:	→	↘	:	:	:
USA	02-99 ⇨ 04-99	:	↗	→	:	:	:

Key:

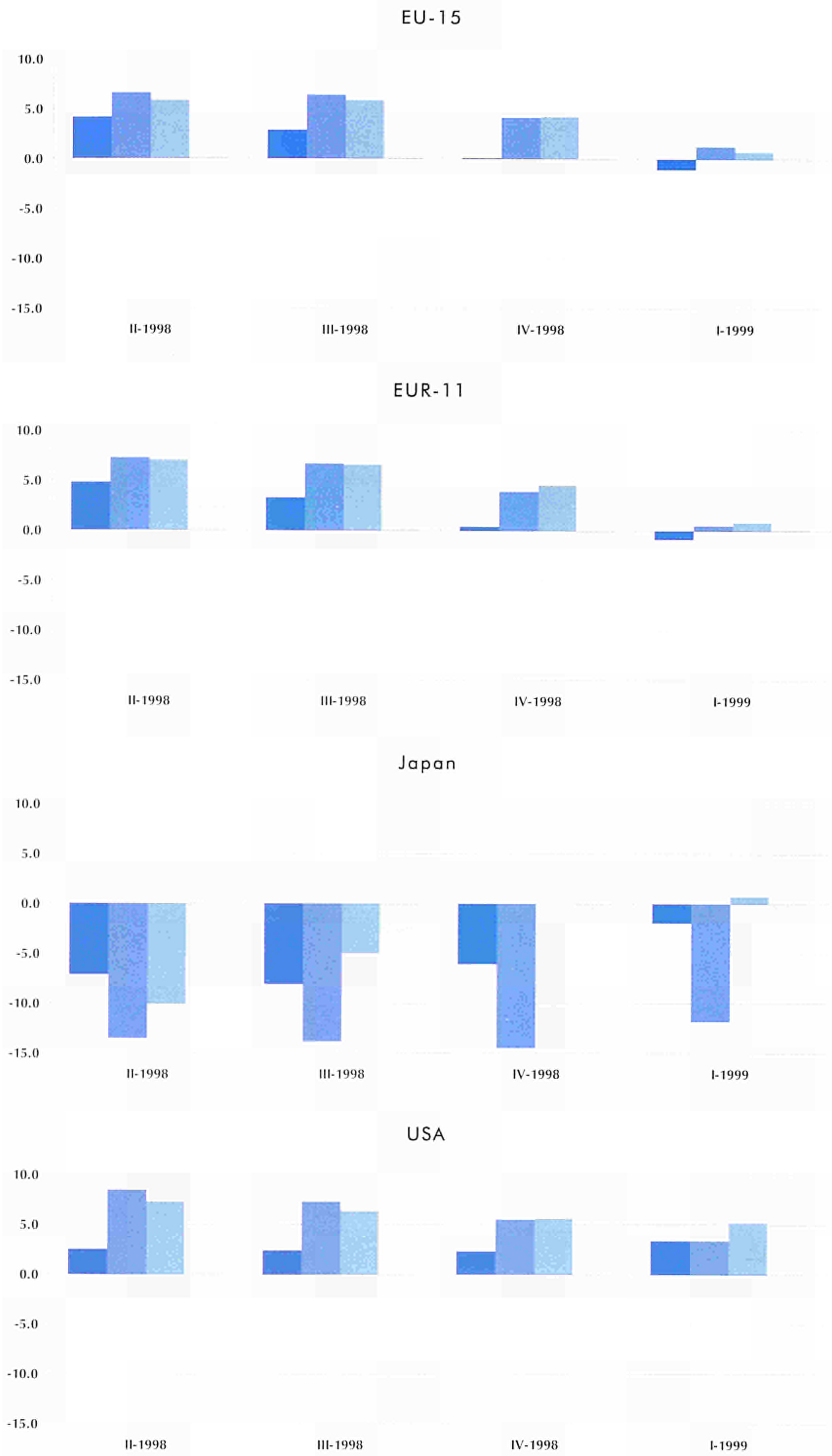
↗↗			>2.5%
↗	0.5%	→	2.5%
→	-0.5%	→	0.5%
↘	-2.5%	→	-0.5%
↘↘			<-2.5%

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

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)

	1996	1997	1998	12-98	01-99	02-99	03-99	04-99	05-99
EU-15	100.6	104.6	108.5	107.6	108.2	107.7	108.4	107.5	:
EUR-11	100.4	104.8	109.1	108.1	108.9	108.4	109.0	108.3	:
B	100.8	105.6	111.0	110.0	111.1	109.7	109.1	110.4	:
DK	101.6	107.0	109.3	107.9	111.1	110.9	113.5	108.1	113.2
D	100.6	104.2	108.9	107.9	107.5	106.9	107.2	106.8	:
EL	101.0	102.7	111.3	113.6	114.0	113.9	113.3	115.1	:
E	99.0	105.9	111.5	112.8	113.5	112.3	113.9	112.4	:
F	99.9	103.9	108.6	108.5	108.4	107.9	109.2	108.5	:
IRL	108.0	124.5	144.0	151.7	153.1	151.8	148.8	:	:
I	98.1	101.8	102.9	100.1	102.3	101.5	101.8	101.2	:
L	99.6	106.3	111.0	108.1	:	:	:	:	:
NL	103.8	106.6	107.7	104.9	105.2	108.3	108.2	106.4	109.1
A	100.6	106.7	110.3	114.5	112.9	113.5	119.2	:	:
P	105.6	108.5	114.2	113.9	116.7	115.8	115.7	116.8	:
FIN	103.8	113.2	121.8	122.7	127.3	126.9	126.4	130.4	:
S	101.7	108.9	113.4	113.7	111.4	114.0	114.5	114.1	:
UK	101.2	102.8	103.7	101.7	101.2	101.2	101.6	101.8	101.8
NO	105.4	109.0	108.3	106.2	108.0	107.4	:	:	:
Japan	102.0	105.9	98.9	97.2	96.6	97.4	99.9	97.3	:
USA	104.4	110.7	114.8	115.7	115.6	115.7	116.4	117.0	:

Source: eurostat

Table 2.3

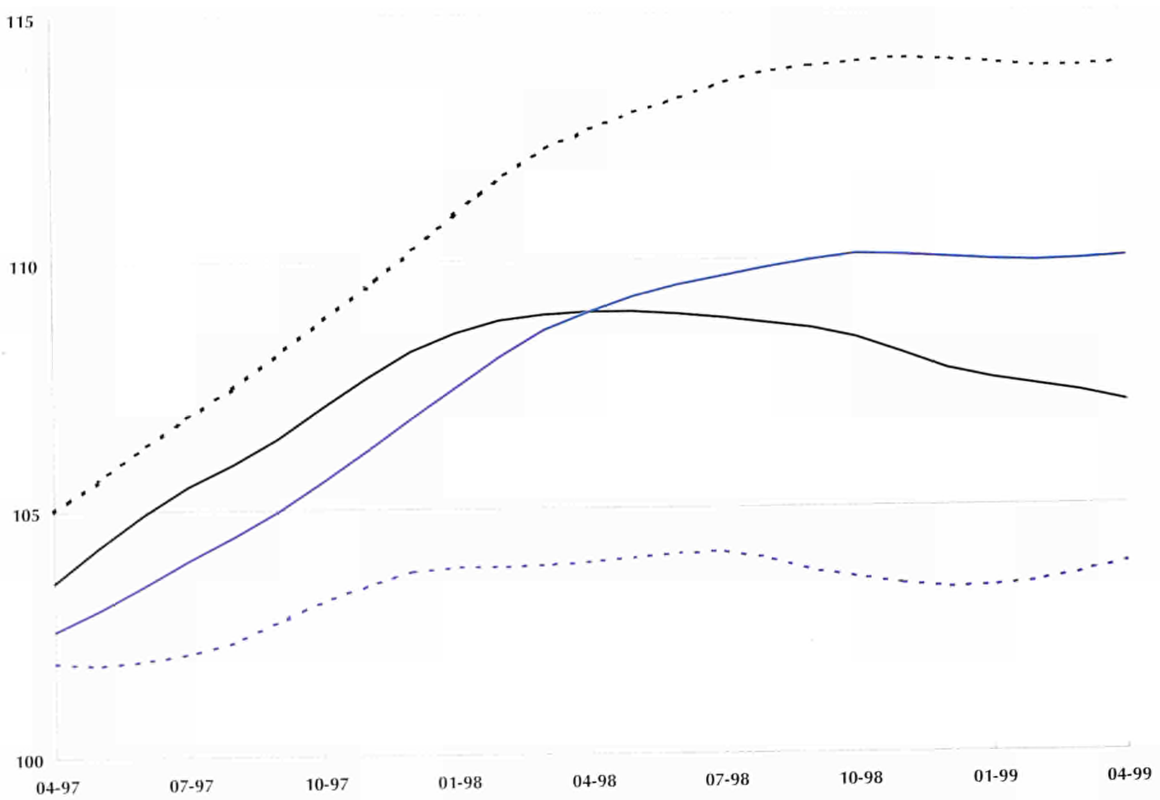
Industrial production for the main industrial groupings: indices (1995 = 100)

	1996	1997	1998	11-98	12-98	01-99	02-99	03-99	04-99
Total industry									
EU-15	100.6	104.6	108.5	108.7	107.6	108.2	107.7	108.4	107.5
Japan	102.0	105.9	98.9	97.2	97.2	96.6	97.4	99.9	97.3
USA	104.4	110.7	114.8	115.5	115.7	115.6	115.7	116.4	117.0
Intermediate goods									
EU-15	100.1	105.0	108.6	108.3	107.2	107.7	107.4	107.5	106.9
Japan	100.0	104.4	98.2	97.2	97.2	99.7	98.5	101.9	98.7
USA	102.5	106.6	109.1	110.4	110.8	111.2	111.1	111.8	112.4
Capital goods									
EU-15	101.8	106.7	113.3	114.0	114.0	114.1	113.6	113.4	114.1
Japan	106.4	109.8	96.6	90.4	90.3	88.2	89.3	97.2	87.8
USA	106.8	116.6	125.5	127.6	126.8	126.2	126.1	127.2	127.0
Consumer durables									
EU-15	100.6	103.8	109.6	110.3	109.5	110.0	109.6	109.6	109.5
Japan	102.6	111.0	105.5	105.6	106.1	107.4	106.8	110.3	101.7
USA	108.2	118.6	127.1	129.9	130.3	130.2	130.3	131.3	132.4
Consumer non-durables									
EU-15	100.1	102.5	103.7	103.3	103.0	103.6	102.9	103.8	103.9
Japan	100.1	101.0	97.8	98.2	98.7	98.9	97.7	97.7	99.9
USA	100.8	103.9	104.5	104.2	104.3	104.0	104.5	104.6	105.0

Source: eurostat

Latest outlook: industry

Figure 2.2



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

Intermediate goods
Capital goods
Consumer durables
Consumer non-durables

Source: eurostat

Table 2.4

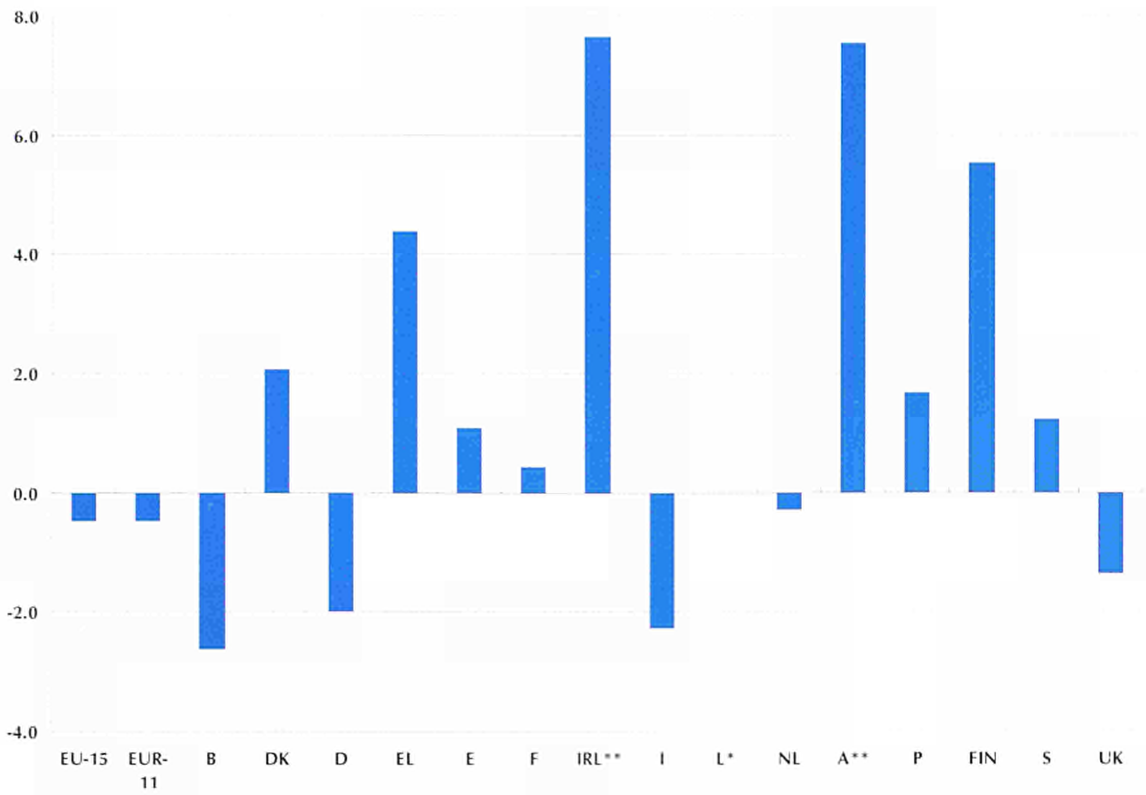
	Latest 3 months available			Total industry	Intermediate goods	Capital goods	Consumer durables	Consumer non-durables
EU-15	02-99	⇨	04-99	-0.3	-0.5	-0.1	0.0	0.2
EUR-11	02-99	⇨	04-99	-0.3	-0.4	-0.3	-0.1	0.1
B	02-99	⇨	04-99	-0.5	-0.1	-0.9	-0.1	-1.1
DK	03-99	⇨	05-99	0.3	-0.3	2.8	3.8	0.9
D	02-99	⇨	04-99	-1.0	-0.6	-2.1	-1.7	-0.2
EL	02-99	⇨	04-99	0.9	-0.9	4.6	1.0	0.8
E	02-99	⇨	04-99	0.4	-0.3	1.0	-0.6	0.7
F	02-99	⇨	04-99	0.2	-0.1	0.5	0.0	0.6
IRL	01-99	⇨	03-99	1.5	3.6	-0.5	:	1.0
I	02-99	⇨	04-99	-0.3	-0.7	0.1	-1.0	0.0
L	10-98	⇨	12-98	0.6	1.4	0.1	4.8	0.4
NL	03-99	⇨	05-99	0.6	0.3	0.4	1.9	0.7
A	01-99	⇨	03-99	2.7	:	:	:	:
P	02-99	⇨	04-99	0.7	1.7	-0.7	:	-1.7
FIN	02-99	⇨	04-99	2.1	1.0	6.3	-6.2	-0.6
S	02-99	⇨	04-99	0.2	-0.5	1.1	0.8	0.7
UK	03-99	⇨	05-99	0.2	-0.6	-1.3	-1.8	-0.3
NO	12-98	⇨	02-99	0.0	-0.5	1.0	-0.3	-0.1
Japan	02-99	⇨	04-99	0.3	1.5	-0.5	-0.5	-0.1
USA	02-99	⇨	04-99	0.9	1.1	0.3	1.4	0.3

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, 02-99 to 04-99 (%)



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 (%)

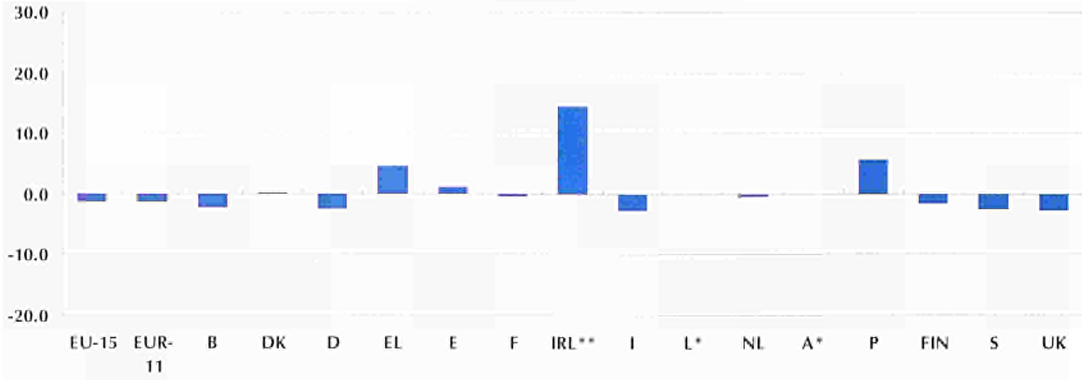
	Latest 3 months available			Total industry	Intermediate goods	Capital goods	Consumer durables	Consumer non-durables
EU-15	02-99	⇨	04-99	-0.5	-1.5	0.4	-0.4	-0.1
EUR-11	02-99	⇨	04-99	-0.5	-1.3	-0.4	-0.6	0.3
B	02-99	⇨	04-99	-2.6	-2.4	-2.3	-7.8	-3.2
DK	03-99	⇨	05-99	6.2	4.6	9.8	9.1	4.7
D	02-99	⇨	04-99	-2.0	-2.6	-3.5	-0.9	-0.5
EL	02-99	⇨	04-99	4.4	4.5	15.0	-3.3	1.2
E	02-99	⇨	04-99	1.1	1.0	4.0	-0.6	1.1
F	02-99	⇨	04-99	0.4	-0.6	2.2	3.6	2.4
IRL	01-99	⇨	03-99	9.1	13.1	10.1	:	4.6
I	02-99	⇨	04-99	-2.3	-2.8	-2.2	-1.7	0.4
L	10-98	⇨	12-98	0.6	-1.7	7.2	18.5	0.8
NL	03-99	⇨	05-99	0.3	-0.5	-0.1	3.8	1.6
A	01-99	⇨	03-99	6.2	:	:	:	:
P	02-99	⇨	04-99	1.7	5.8	-2.0	-0.6	-4.8
FIN	02-99	⇨	04-99	5.5	-1.8	24.0	-17.0	-1.9
S	02-99	⇨	04-99	1.2	-2.5	5.3	6.5	2.1
UK	03-99	⇨	05-99	-1.1	-2.9	4.0	2.6	-2.1
NO	12-98	⇨	02-99	-2.2	-0.6	5.2	-3.0	-1.2
Japan	02-99	⇨	04-99	-2.5	-0.2	-9.9	0.7	0.4
USA	02-99	⇨	04-99	2.2	3.6	2.9	5.5	-0.4

Source: eurostat

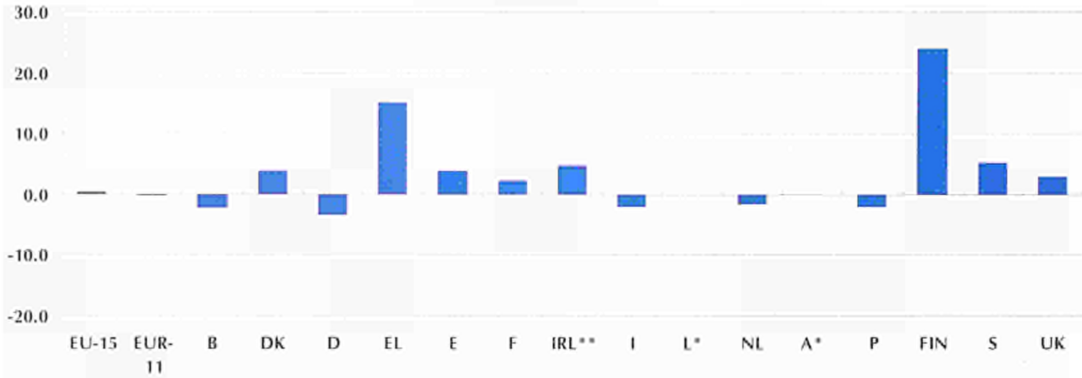
Figure 2.4

Industrial production for the main industrial groupings: growth rate, three months compared to the same three months of the previous year, 02-99 to 04-99 (%)

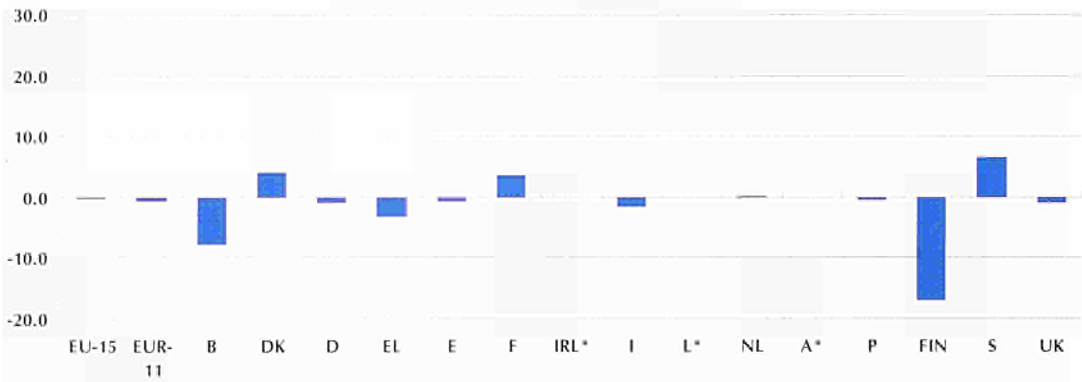
Intermediate goods



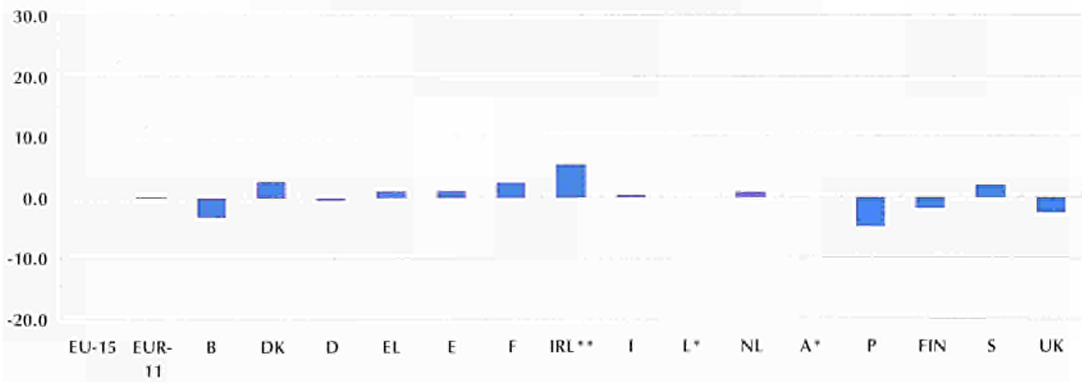
Capital goods



Consumer durables goods



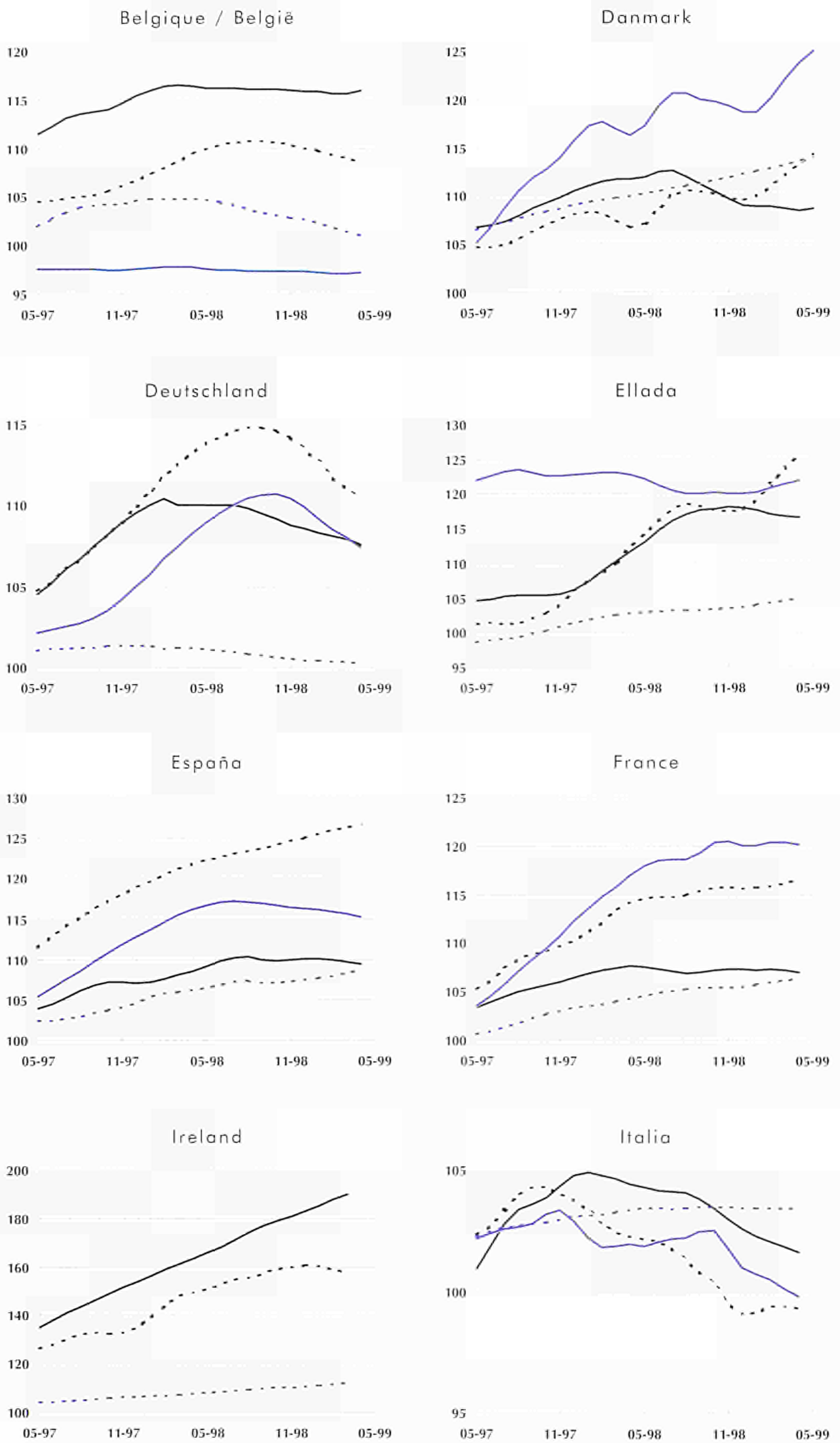
Consumer non-durables goods



Source: eurostat

Figure 2.5

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



Intermediate goods

Capital goods

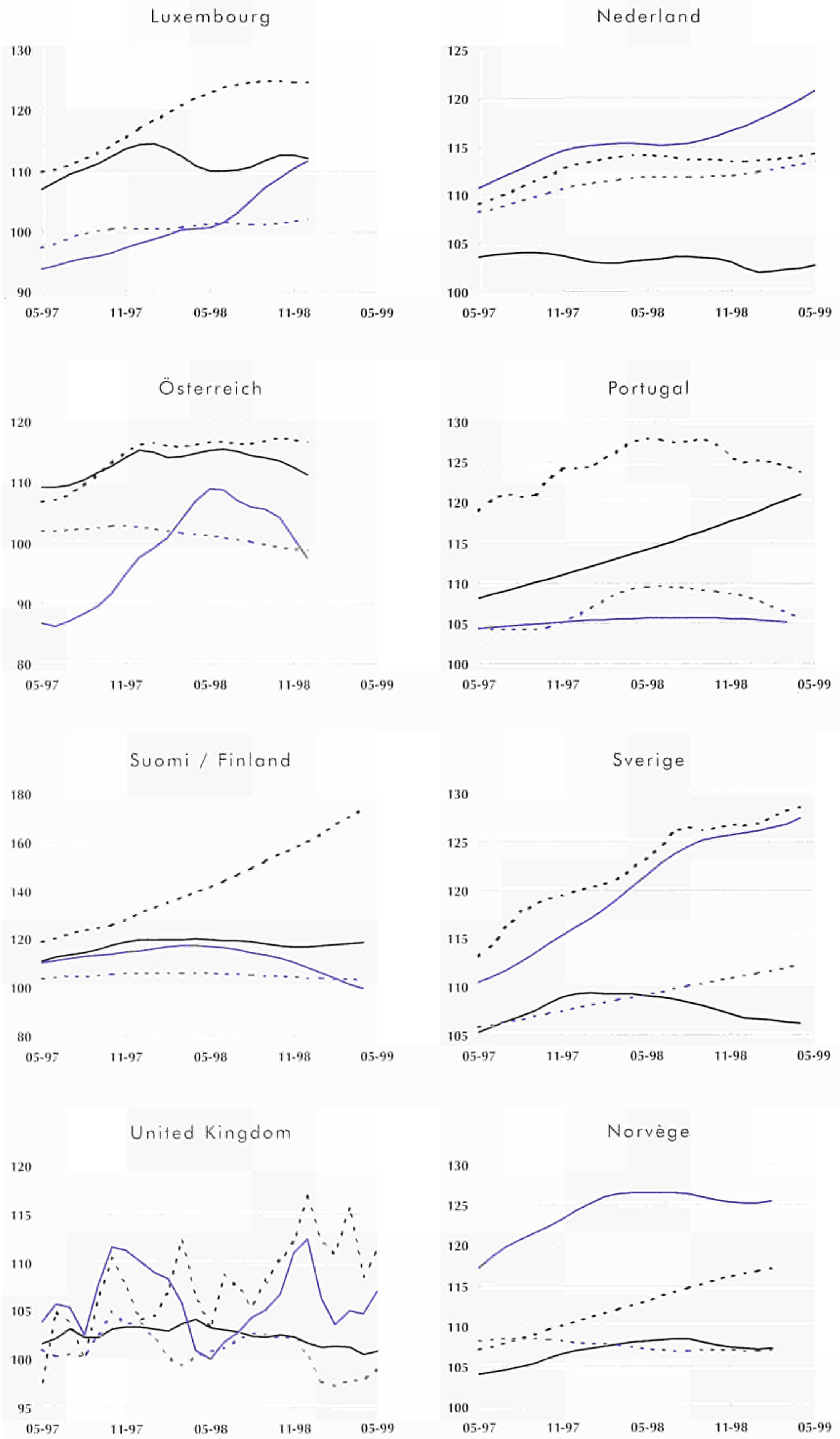
Consumer durables

Consumer non-durables

Source: eurostat

Figure 2.5

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



Intermediate goods

Capital goods

Consumer durables

Consumer non-durables

Source: eurostat

Further information - production index

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 is base year 1995. The indices are adjusted to take account of the varying number of working days in the month.

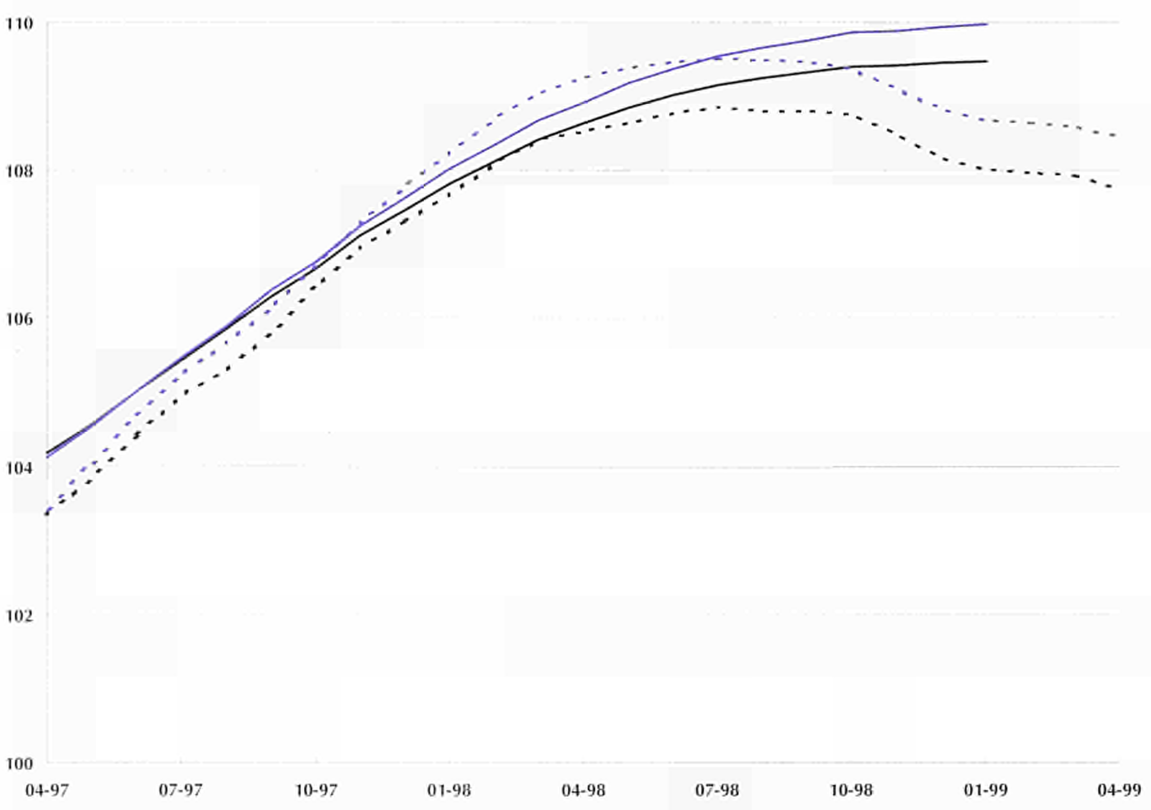
If the National Statistical Office does the seasonal adjustment, these series are used. This is currently the case for Belgium, Denmark, Greece, France, Italy, Finland, Sweden, the United Kingdom and Norway (although not necessarily for all variables). If no seasonally adjusted series are supplied, Eurostat perform the seasonal adjustment with TRAMO / SEATS, a method developed by Professor Maravall and V. Gomez. Otherwise, Eurostat calculates the trend cycle (except for Germany) seasonally adjusted series, where additionally the irregular fluctuations have been excluded (using the program TRAMO / SEATS).

Full methodological notes may be found on page 109.

Latest outlook: industry

Figure 2.6

Expected output index for industry (1995 = 100)

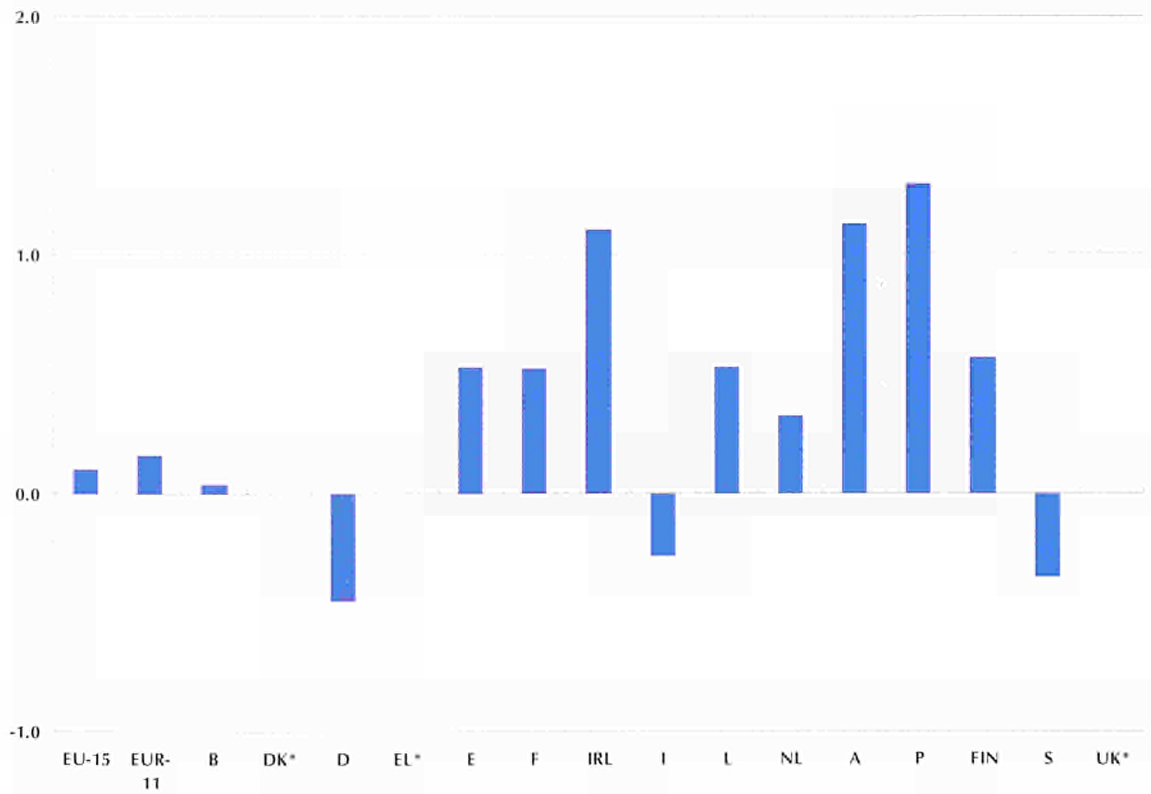


EU-15: production index
EU-15: expected output index
EUR-11: production index
EUR-11: expected output index

Source: eurostat

Figure 2.7

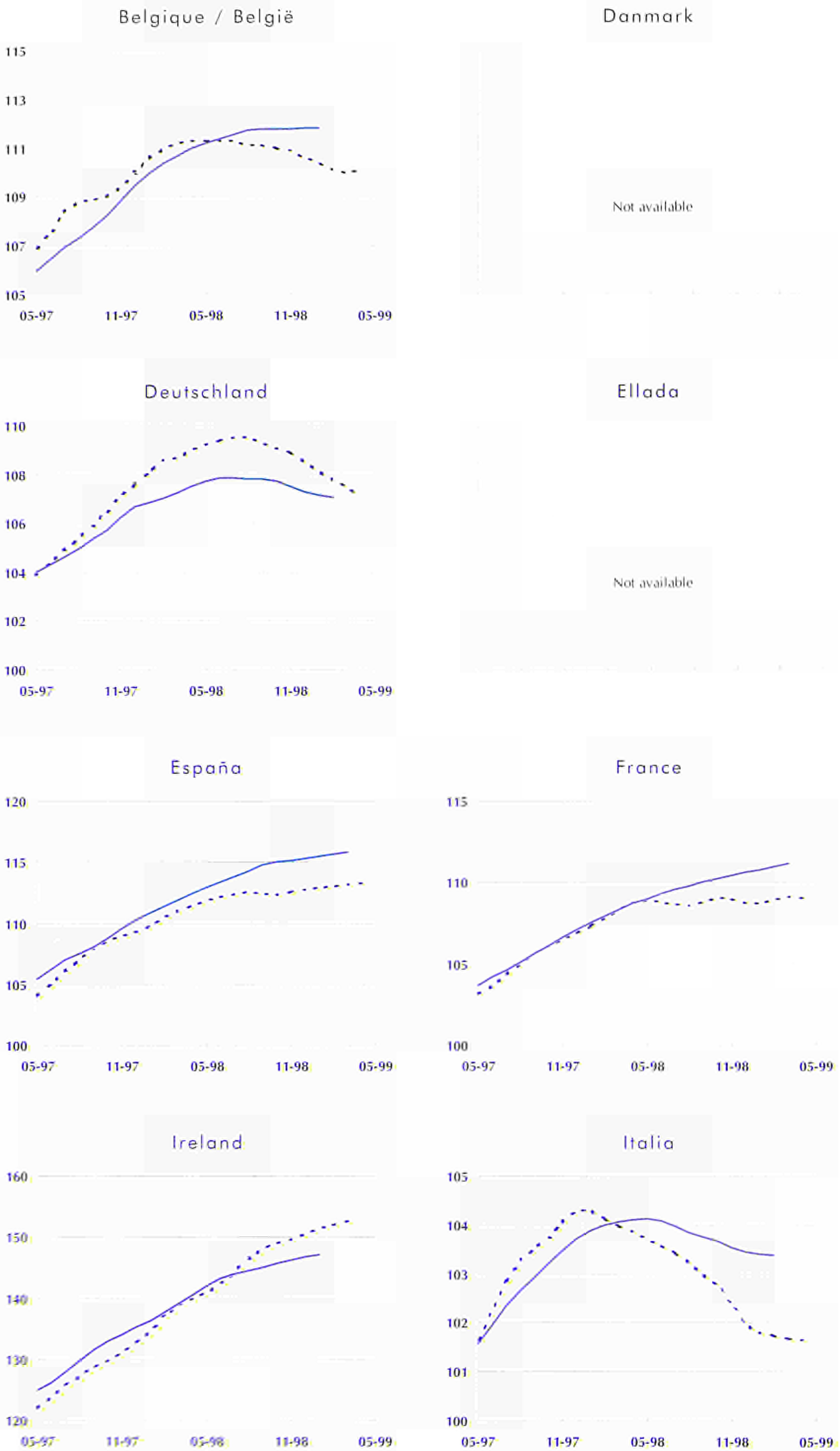
Expected output index for industry, three months compared to the previous three months, 11-98 to 01-99 (%)



Source: eurostat

Figure 2.8

Expected output index for industry (1995 = 100)



Production index -----

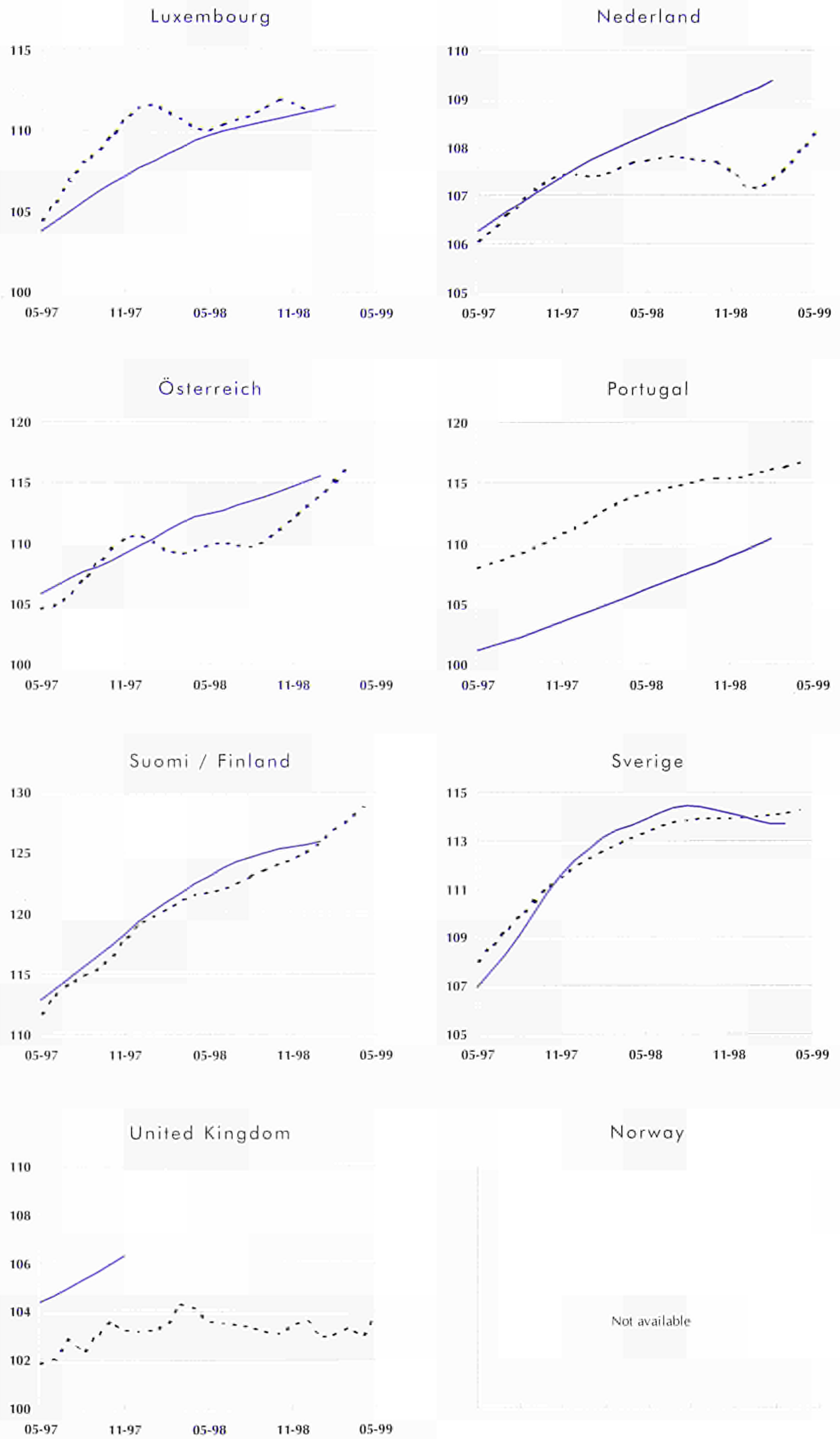
Expected output index ——

Source: eurostat

Latest outlook: industry

Figure 2.8

Expected output index for industry (1995 = 100)



----- Production index

—— Expected output index

Source: eurostat

Further information - expected output index

The Expected Output Index (EOI) links several aspects of information from qualitative business opinion surveys conducted by DG II (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 109.

Latest outlook: industry

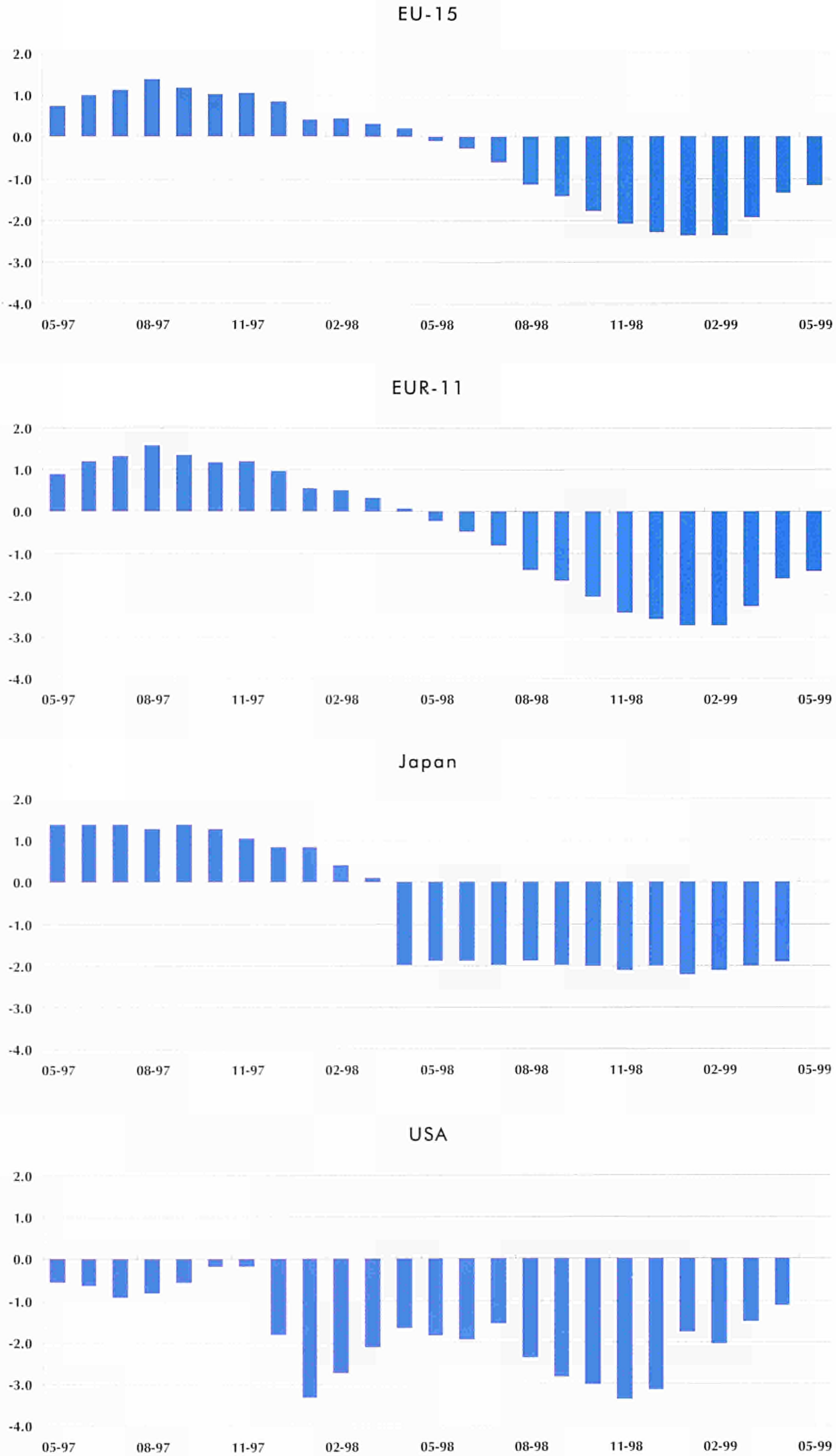


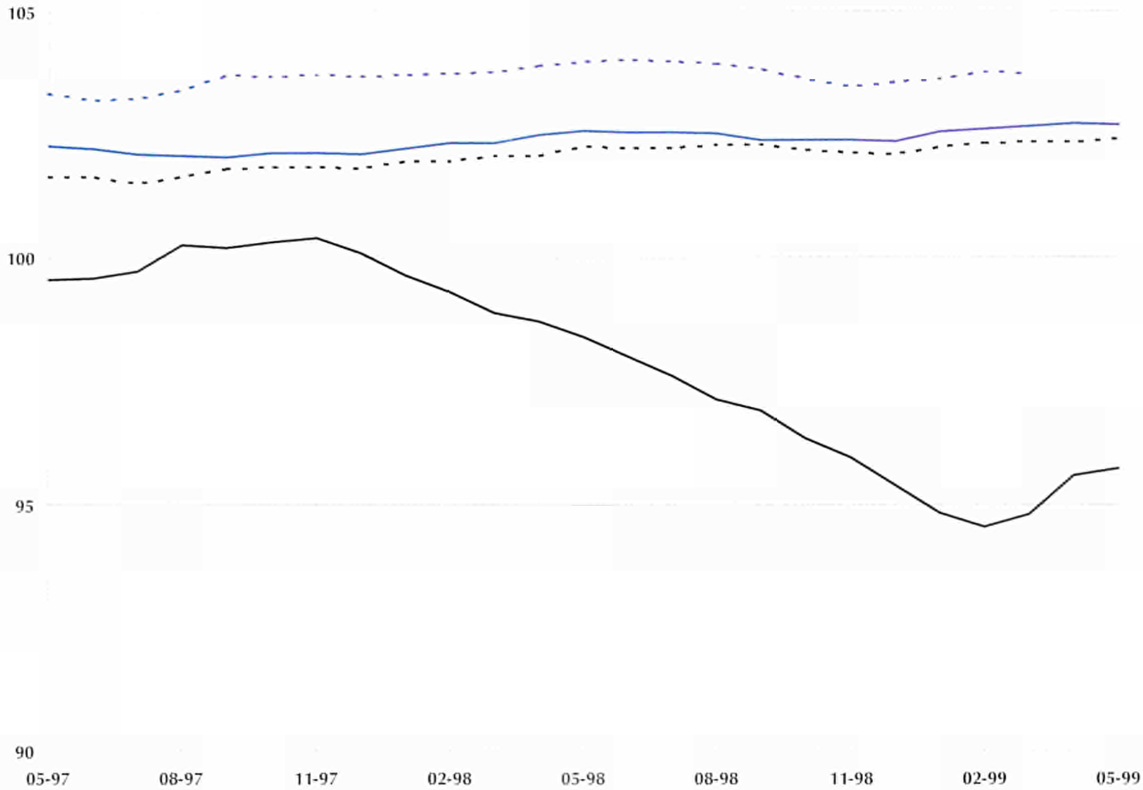
Figure 2.9

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

Source: eurostat

Figure 2.10

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



Source: eurostat

Table 2.6

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

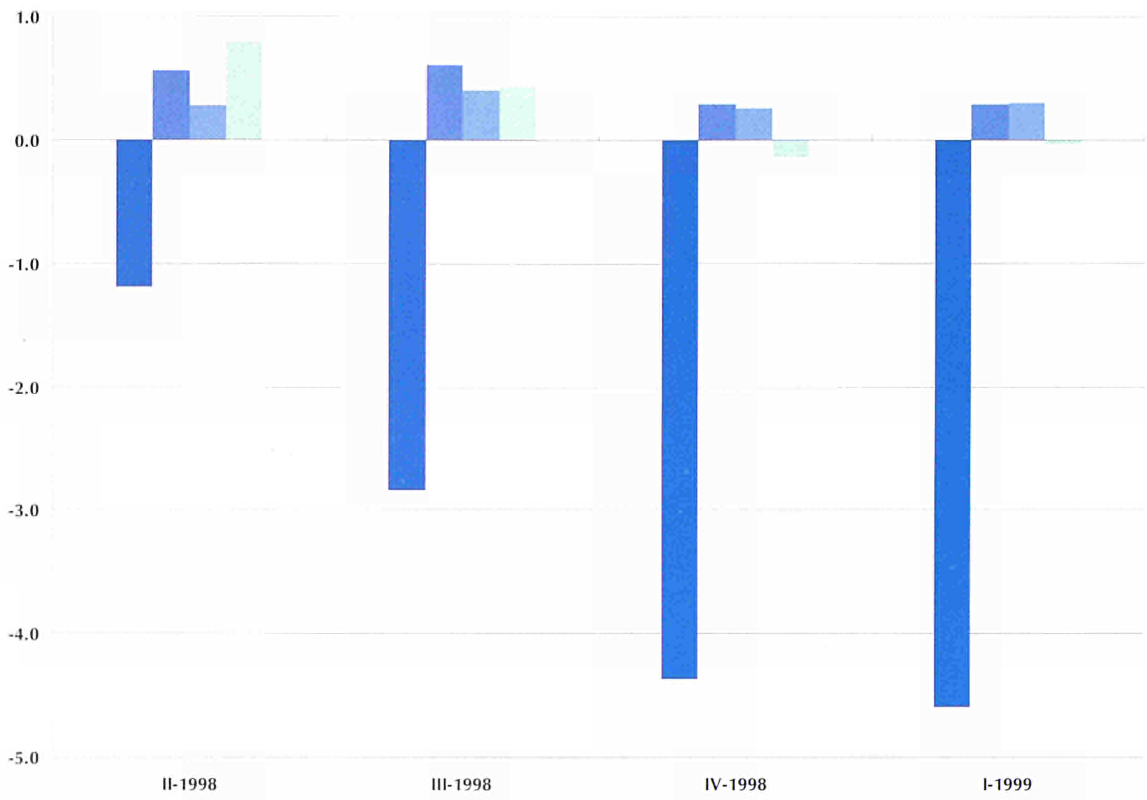
	1996	1997	1998	12-98	01-99	02-99	03-99	04-99	05-99
Total industry									
EU-15	100.5	101.4	100.7	99.5	99.3	99.2	99.3	99.8	99.9
Japan	98.2	98.9	97.6	96.8	96.5	96.3	96.1	95.9	:
USA	102.3	102.3	99.7	98.4	98.7	98.1	98.4	99.0	:
Intermediate goods									
EU-15	99.1	99.9	97.7	95.4	94.8	94.5	94.8	95.6	95.7
Japan	:	:	:	:	:	:	:	:	:
USA	:	:	:	:	:	:	:	:	:
Capital goods									
EU-15	101.3	101.7	102.1	102.1	102.2	102.3	102.3	102.3	102.4
Japan	:	:	:	:	:	:	:	:	:
USA	:	:	:	:	:	:	:	:	:
Consumer durables									
EU-15	102.0	102.2	102.4	102.4	102.5	102.6	102.7	102.7	102.7
Japan	:	:	:	:	:	:	:	:	:
USA	:	:	:	:	:	:	:	:	:
Consumer non-durables									
EU-15	102.0	103.2	103.8	103.5	103.6	103.7	103.7	:	:
Japan	:	:	:	:	:	:	:	:	:
USA	:	:	:	:	:	:	:	:	:

Source: eurostat

Latest outlook: industry

Figure 2.11

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



Source: eurostat

Table 2.7

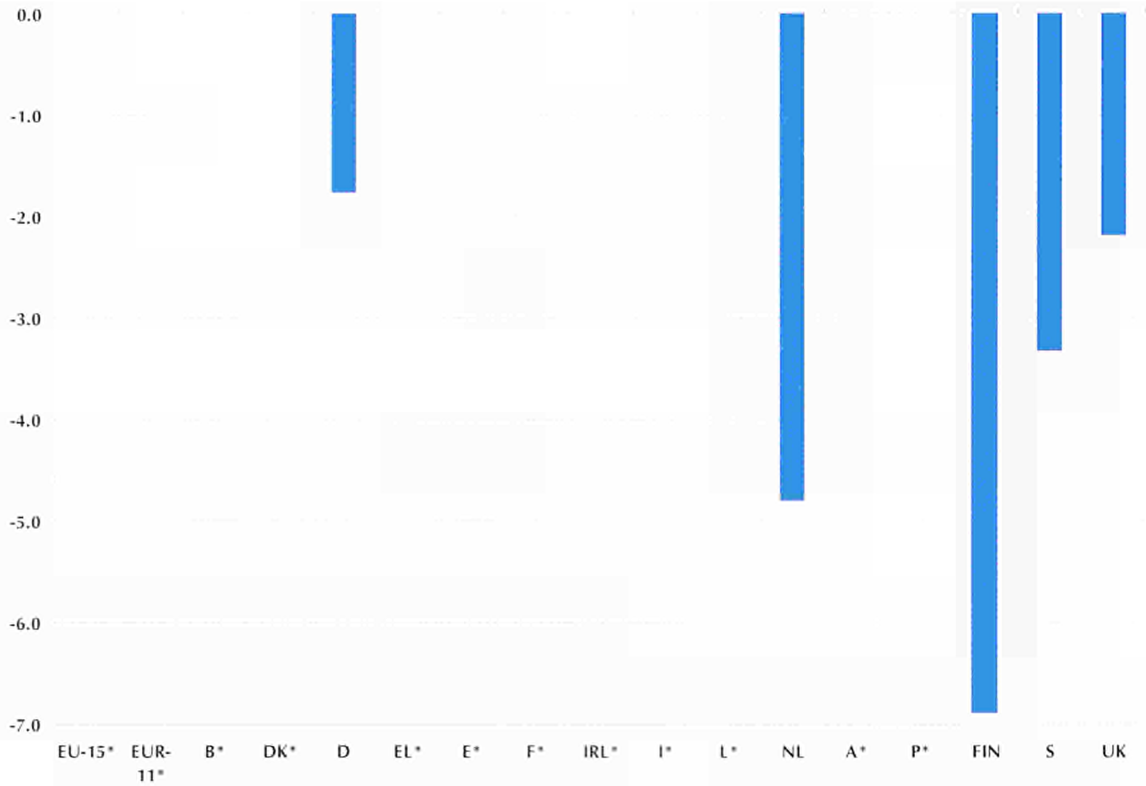
Domestic producer price index for the main industrial groupings: growth rate, year on year (%)

	Latest month available	Total industry	Intermediate goods	Capital goods	Consumer durables	Consumer non-durables
EU-15	05-99	-1.2	-2.7	0.1	0.1	:
EUR-11	05-99	-1.4	-2.8	0.1	0.1	:
B	04-99	-2.8	-4.8	-0.4	:	2.4
DK	05-99	-0.3	0.3	2.1	2.1	-2.2
D	05-99	-1.7	-2.9	0.2	0.4	-1.4
EL	12-98	1.8	-1.0	9.0	4.2	4.0
E	05-99	-0.5	-2.5	0.5	1.3	1.8
F	05-99	-1.1	-2.5	-1.3	-1.5	:
IRL	01-99	-0.6	:	:	:	1.3
I	05-99	-1.4	-3.5	0.8	0.9	-0.2
L	12-98	0.3	-6.4	0.7	-3.1	-0.6
NL	05-99	-2.0	-3.4	2.7	1.2	-1.7
A		:	:	:	:	:
P	04-99	-2.4	-3.7	:	0.9	0.2
FIN	05-99	-2.8	:	-0.5	3.8	-0.8
S	05-99	-1.2	-2.8	-0.2	1.4	-0.1
UK	05-99	0.0	-2.5	-0.1	-0.2	0.7
NO		:	:	:	:	:
Japan	04-99	-1.9	:	:	:	:
USA	04-99	-1.1	:	:	:	:

Source: eurostat

Figure 2.12

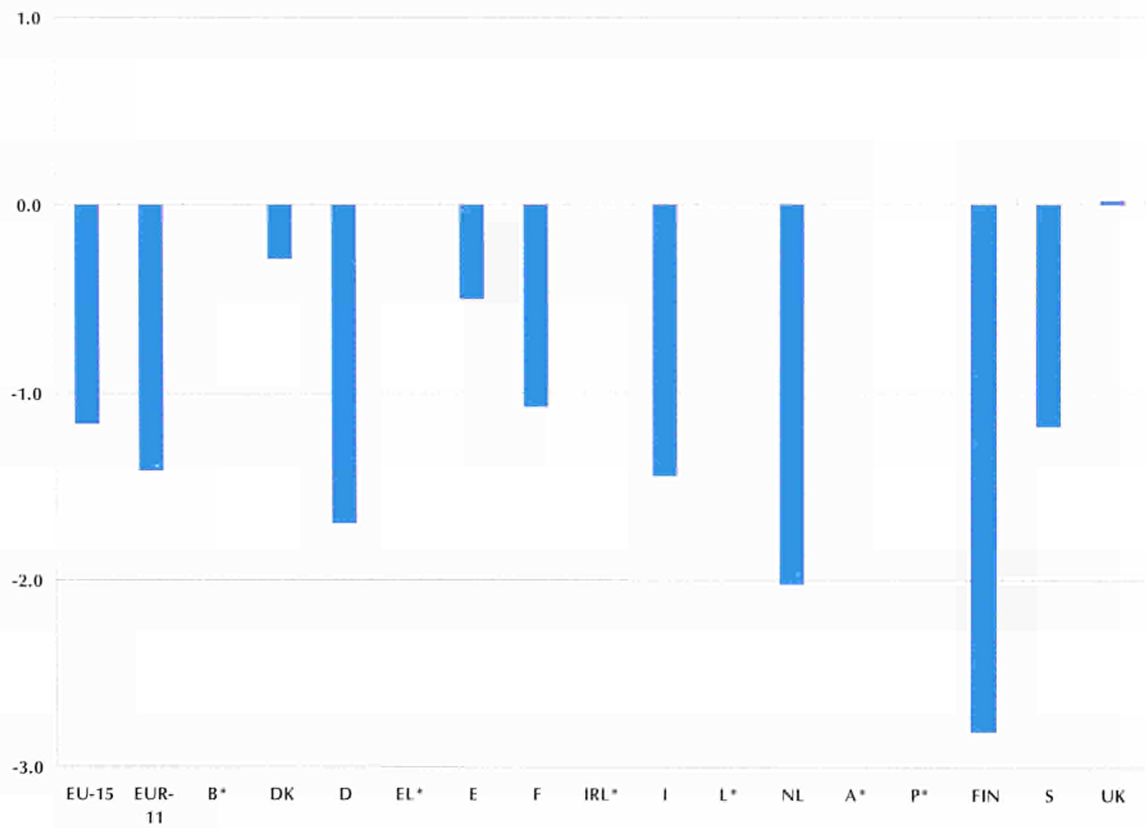
Export prices for manufacturing industry: growth rate, year on year, 03-99 (%)



Source: eurostat

Figure 2.13

Domestic producer price index: growth rate, year on year, 05-99 (%)



Source: eurostat

Table 2.8

Export prices indices for manufacturing industry (1995 = 100)

	1996	1997	1998	12-98	01-99	02-99	03-99	04-99	05-99
EU-15	:	:	:	:	:	:	:	:	:
EUR-11	:	:	:	:	:	:	:	:	:
B	:	:	:	:	:	:	:	:	:
DK	:	:	:	:	:	:	:	:	:
D	100.0	101.5	101.4	100.4	100.1	100.2	100.2	100.4	:
EL	:	:	:	:	:	:	:	:	:
E	:	:	:	:	:	:	:	:	:
F	:	:	:	:	:	:	:	:	:
IRL	:	:	:	:	:	:	:	:	:
I	:	:	:	:	:	:	:	:	:
L	96.2	97.6	99.3	95.0	:	:	:	:	:
NL	101.3	104.8	102.3	99.1	98.6	98.2	99.4	100.0	100.2
A	:	:	:	:	:	:	:	:	:
P	:	:	:	:	:	:	:	:	:
FIN	100.3	99.0	98.0	93.9	93.4	93.1	93.2	93.9	93.9
S	95.0	95.7	95.3	94.9	94.5	92.7	92.8	93.4	93.8
UK	99.5	94.2	91.0	90.0	90.0	90.0	89.0	89.0	:
NO	:	:	:	:	:	:	:	:	:
Japon	:	:	:	:	:	:	:	:	:
USA	:	:	:	:	:	:	:	:	:

Source: eurostat

Table 2.9

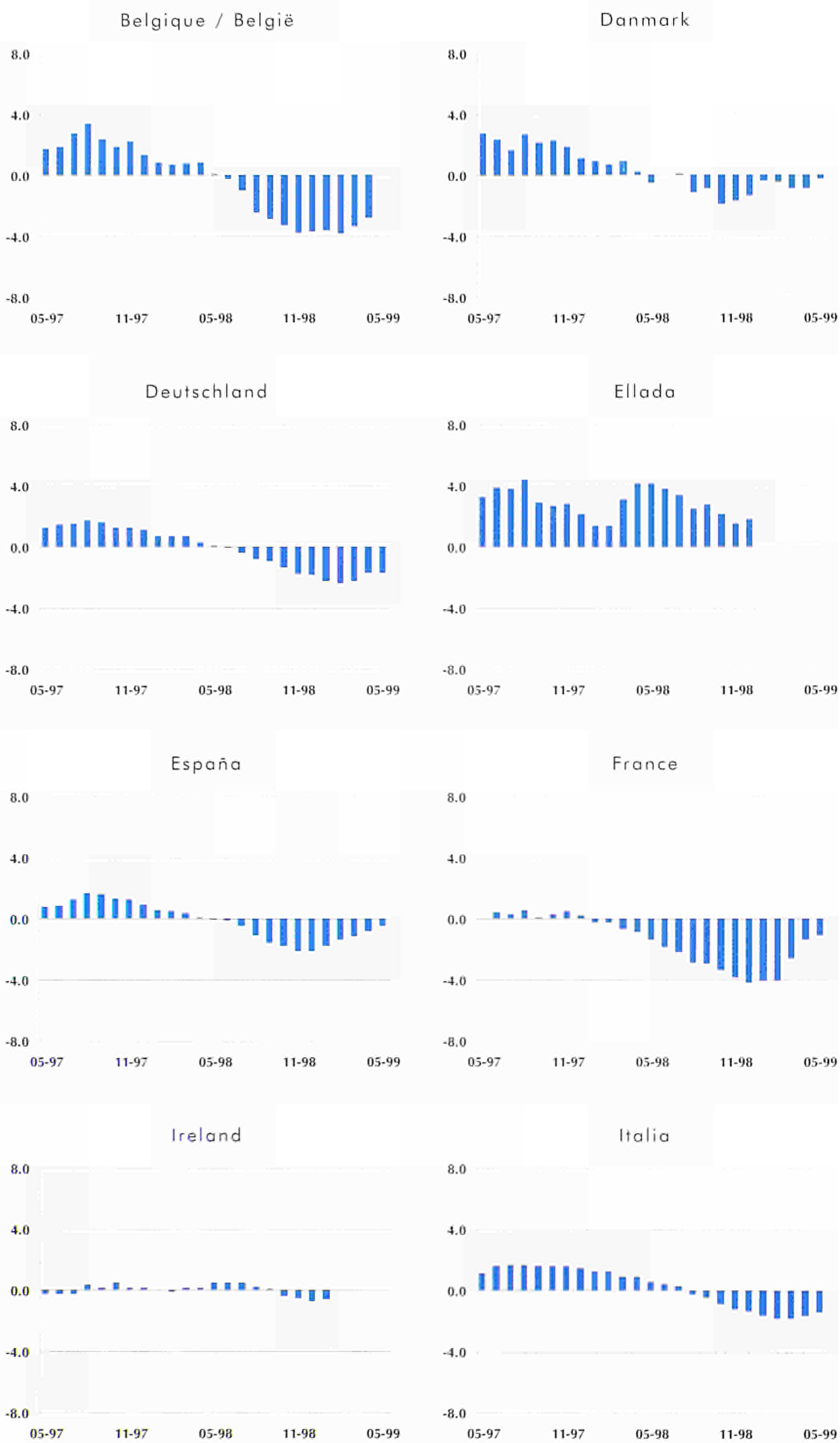
Domestic producer price index (1995 = 100)

	1996	1997	1998	12-98	01-99	02-99	03-99	04-99	05-99
EU-15	100.5	101.4	100.7	99.5	99.3	99.2	99.3	99.8	99.9
EUR-11	100.4	101.4	100.6	99.1	98.8	98.7	99.0	99.6	99.6
B	100.6	102.3	101.1	98.5	98.2	98.0	98.4	99.4	:
DK	101.5	103.3	102.9	101.9	102.3	102.2	102.2	102.9	103.4
D	98.8	99.9	99.5	98.3	97.8	97.7	97.7	98.3	98.3
EL	107.4	111.0	114.0	114.1	:	:	:	:	:
E	101.7	102.7	102.0	100.9	100.9	101.2	101.4	101.6	101.9
F	100.5	100.7	98.6	96.4	96.4	96.3	97.2	98.2	98.1
IRL	101.8	101.9	101.9	101.3	101.3	:	:	:	:
I	101.9	103.2	103.3	102.4	102.2	102.0	101.9	102.1	102.1
L	99.6	101.4	103.4	102.6	:	:	:	:	:
NL	101.6	104.3	103.0	101.3	100.9	100.8	101.3	101.5	101.6
A	:	:	:	:	:	:	:	:	:
P	103.8	106.1	102.2	99.2	97.0	97.0	97.8	99.9	:
FIN	99.1	100.4	99.0	96.5	96.0	95.8	96.0	96.6	97.0
S	100.6	101.7	101.3	100.2	100.2	99.7	99.8	100.4	100.6
UK	100.6	100.3	100.2	100.9	100.8	100.5	100.2	100.1	100.1
NO	:	:	:	:	:	:	:	:	:
Japon	98.2	98.9	97.6	96.8	96.5	96.3	96.1	95.9	:
USA	102.3	102.3	99.7	98.4	98.7	98.1	98.4	99.0	:

Source: eurostat

Figure 2.14

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

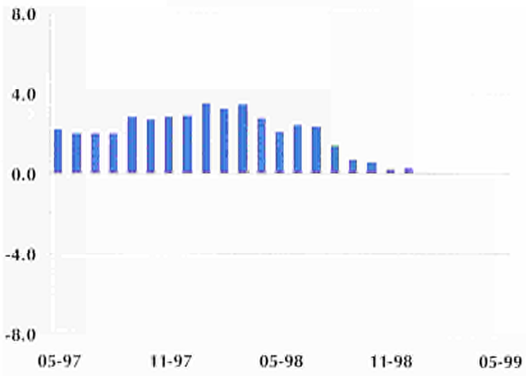


Source: eurostat

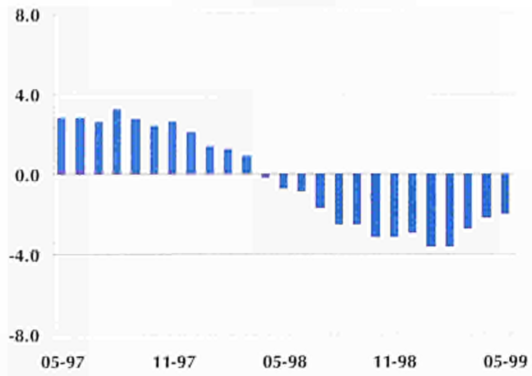
Figure 2.14

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

Luxembourg



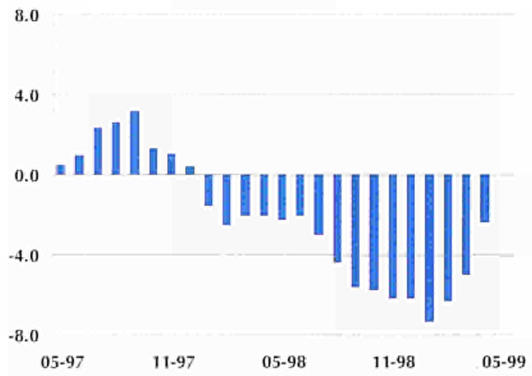
Nederland



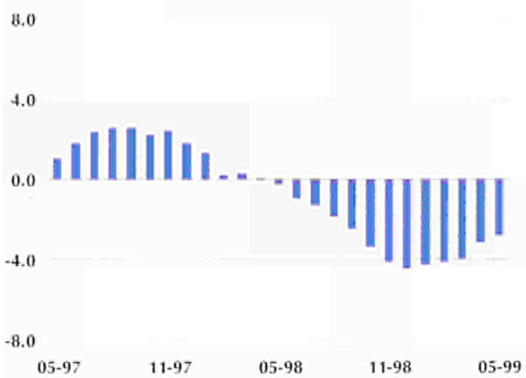
Österreich

Not available

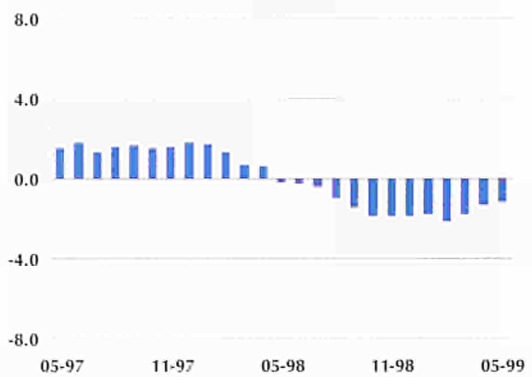
Portugal



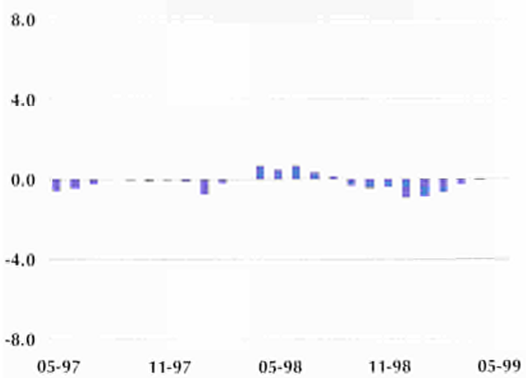
Suomi / Finland



Sverige



United Kingdom



Norway

Not available

Source: eurostat

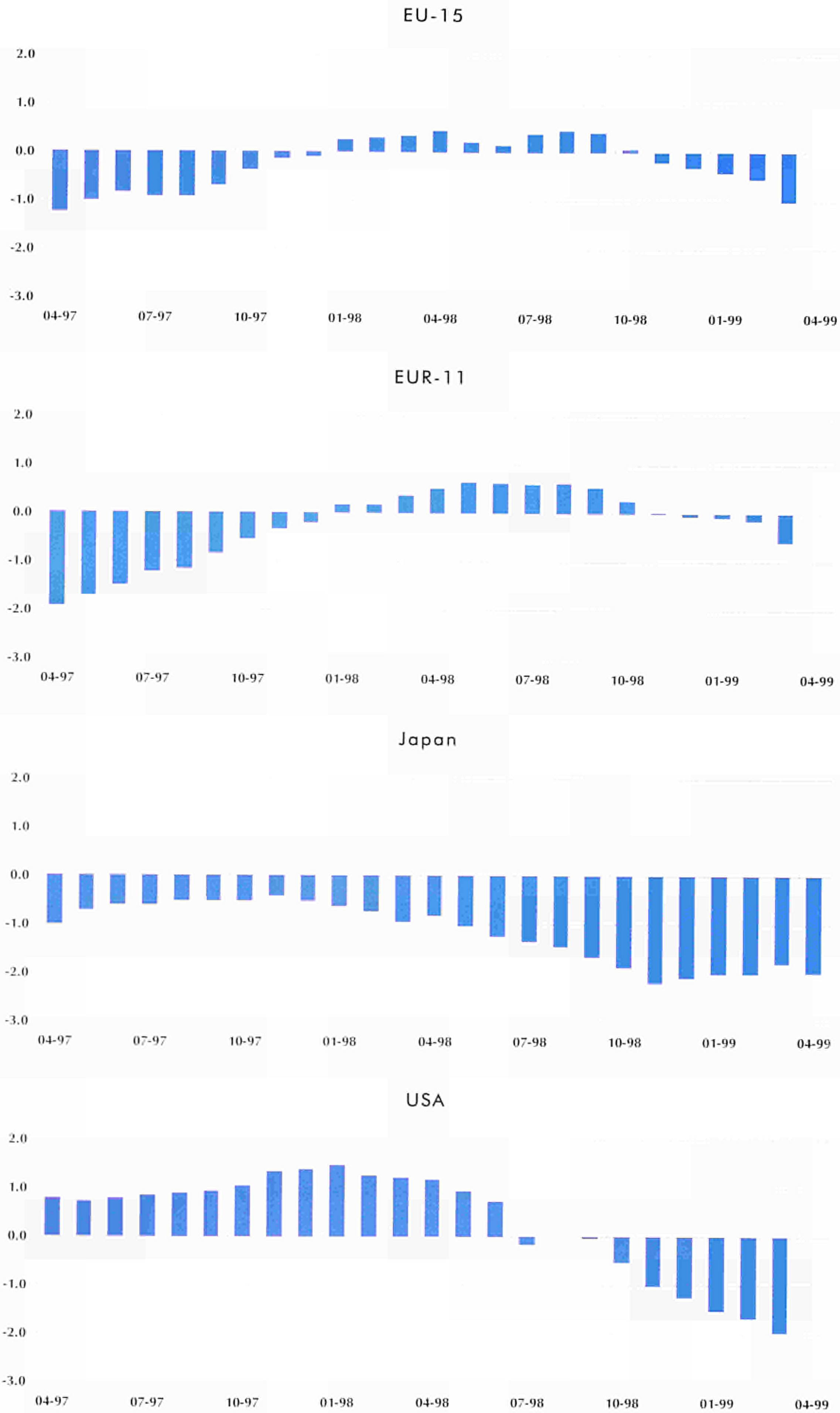
Further information - price indices

The index of producer prices shows the changes in the ex-works selling prices of all products sold on domestic markets of the various countries, excluding VAT and other taxes. 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.

Full methodological notes may be found on page 109.

Figure 2.15

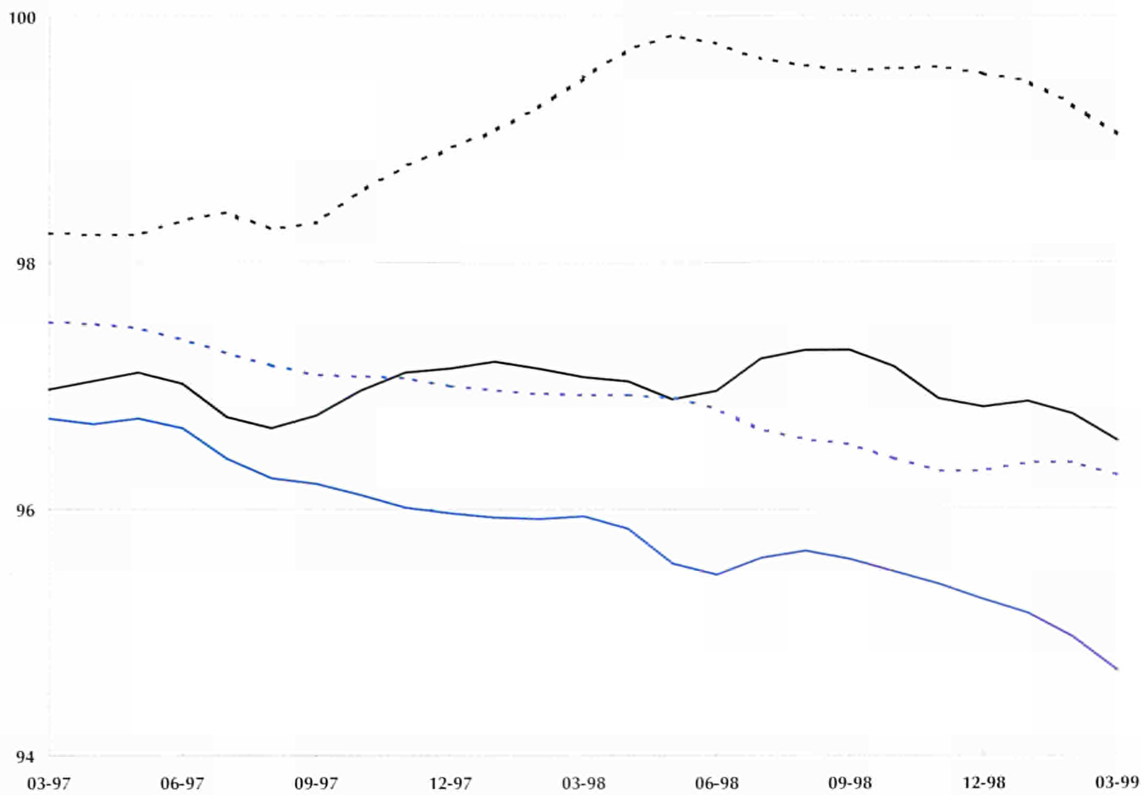
Employment index: growth rate, year on year (%)



Source: eurostat

Figure 2.16

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



Intermediate goods
Capital goods
Consumer durables
Consumer non-durables

Source: eurostat

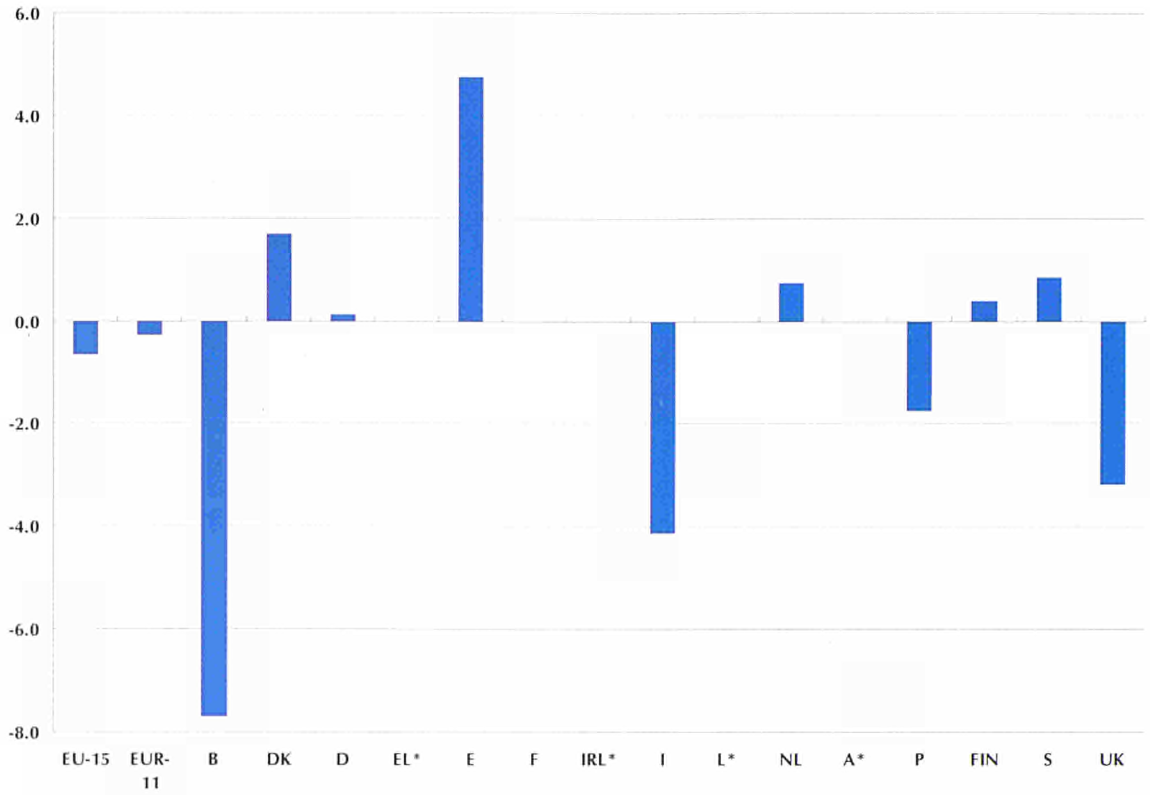
Table 2.10

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	01-99	⇨	03-99	-0.4	-0.2	-0.3	-0.5	0.0
EUR-11	01-99	⇨	03-99	-0.3	-0.2	-0.2	-0.7	0.1
B	02-99	⇨	04-99	-2.1	:	:	-0.6	-0.8
DK	01-99	⇨	03-99	-0.4	-2.2	-2.1	1.7	1.2
D	02-99	⇨	04-99	-0.4	-0.3	-0.3	-1.1	0.0
EL	07-98	⇨	09-98	-0.2	0.6	2.2	1.3	-1.6
E	01-99	⇨	03-99	0.7	:	-0.4	-2.7	3.4
F	01-99	⇨	03-99	-0.3	:	:	:	:
IRL	07-98	⇨	09-98	0.4	0.7	-1.0	:	0.1
I	01-99	⇨	03-99	-1.2	-1.7	-1.0	0.5	0.5
L	10-98	⇨	12-98	-0.1	-0.6	0.8	0.5	0.3
NL	01-99	⇨	03-99	0.6	0.0	0.7	-0.2	0.0
A	11-98	⇨	01-99	-0.7	:	-1.0	-0.8	-1.3
P	02-99	⇨	04-99	-0.8	-0.5	-1.8	-0.9	-1.5
FIN	01-99	⇨	03-99	-0.3	:	:	:	:
S	01-99	⇨	03-99	-0.8	:	:	:	:
UK	02-99	⇨	04-99	-1.0	-1.0	-1.1	-0.4	-0.8
NO		⇨		:	:	:	:	:
Japan	02-99	⇨	04-99	-0.4	:	:	:	:
USA	01-99	⇨	03-99	-0.7	:	:	:	:

Source: eurostat

Figure 2.17



Employment index: growth rate, three months compared to the same three months of the previous year, 01-99 to 03-99 (%)

Source: eurostat

Table 2.11

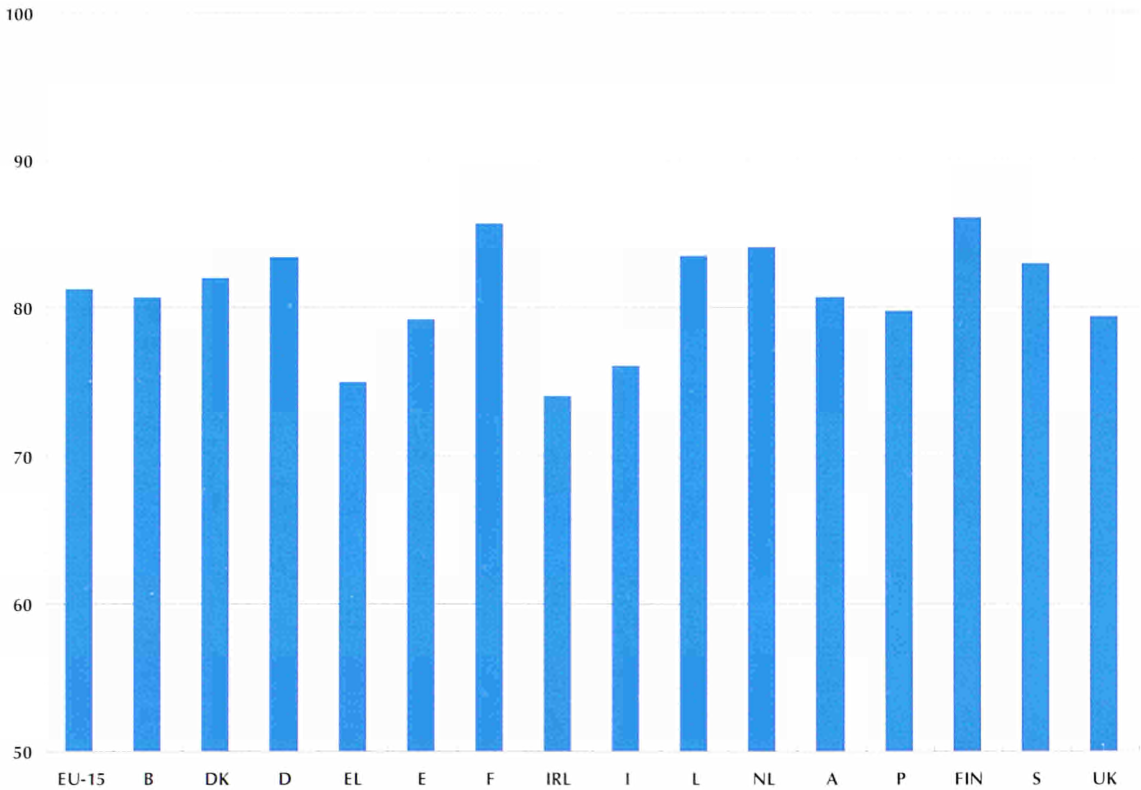
	Latest 3 months available			Total industry	Intermediate goods	Capital goods	Consumer durables	Consumer non-durables
EU-15	01-99	⇨	03-99	-0.7	-0.4	0.0	-1.0	-0.6
EUR-11	01-99	⇨	03-99	-0.3	0.1	0.6	-0.9	0.1
B	02-99	⇨	04-99	-7.8	:	:	-0.2	-1.8
DK	01-99	⇨	03-99	1.7	2.4	-1.1	4.2	3.3
D	02-99	⇨	04-99	-0.2	-0.2	0.7	-2.9	-0.4
EL	07-98	⇨	09-98	0.6	-0.6	7.0	1.3	-0.9
E	01-99	⇨	03-99	4.7	:	5.9	0.9	4.3
F	01-99	⇨	03-99	0.0	:	:	:	:
IRL	07-98	⇨	09-98	1.8	2.2	1.4	:	1.3
I	01-99	⇨	03-99	-4.1	-4.8	-4.9	0.2	0.2
L	10-98	⇨	12-98	0.9	-1.1	7.4	5.9	-0.5
NL	01-99	⇨	03-99	0.7	0.2	2.0	-0.8	0.9
A	11-98	⇨	01-99	1.5	:	2.8	-0.6	1.3
P	02-99	⇨	04-99	-2.0	-1.2	-1.5	0.9	-3.4
FIN	01-99	⇨	03-99	0.4	:	:	:	:
S	01-99	⇨	03-99	0.9	:	:	:	:
UK	02-99	⇨	04-99	-3.5	-3.6	-3.6	-2.0	-3.6
NO		⇨		:	:	:	:	:
Japan	02-99	⇨	04-99	-1.9	:	:	:	:
USA	01-99	⇨	03-99	-1.7	:	:	:	:

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

Source: eurostat

Figure 2.18

Capacity utilisation rates: 04-99 (%)



Source: DG II, Business Survey

Table 2.12

Capacity utilisation rates (%)

	Growth rate: latest month, t / t-12 (%)	07-98	10-98	01-99	04-99
EU-15	-2.4	83.8	82.8	81.3	81.3
B	-2.3	83.5	82.5	78.7	80.7
DK	-2.3	86.8	85.4	82.7	82.0
D	-2.2	86.1	85.6	83.5	83.4
EL	-2.6	76.0	75.0	74.0	75.0
E	-1.0	81.1	80.9	80.6	79.2
F	0.6	85.6	84.8	84.9	85.7
IRL	-4.5	74.8	77.4	73.6	74.0
I	-2.7	79.5	76.6	76.0	76.1
L	-5.0	87.7	87.2	84.5	83.5
NL	-1.8	85.5	84.8	83.6	84.1
A	-3.1	84.7	83.5	81.4	80.7
P	-3.4	81.0	81.3	81.5	79.8
FIN	-2.2	89.8	87.3	84.7	86.1
S	-3.5	87.0	86.0	85.0	83.0
UK	-5.6	83.0	82.2	79.3	79.4

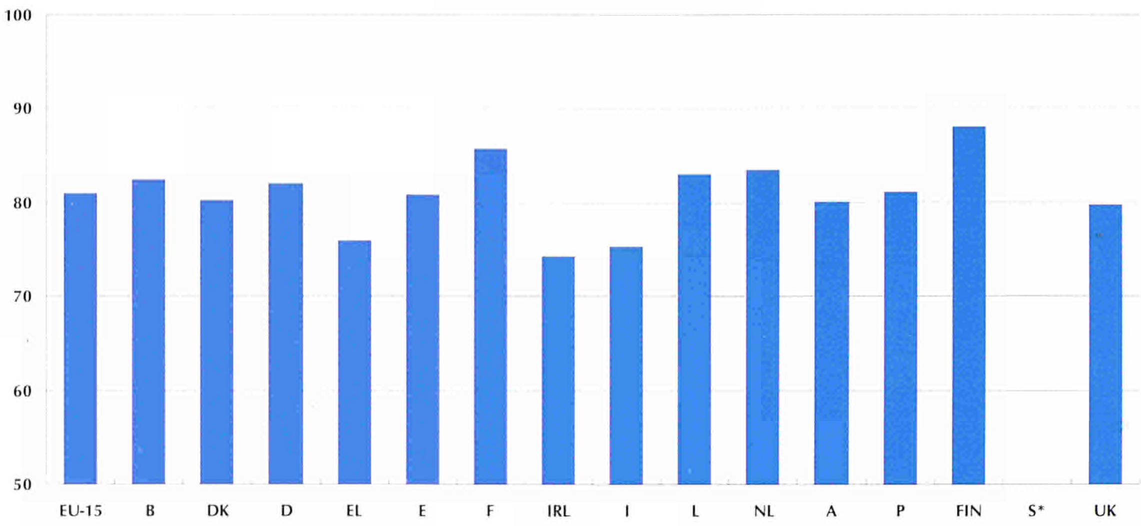
Source: DG II, Business Survey

Latest outlook: industry

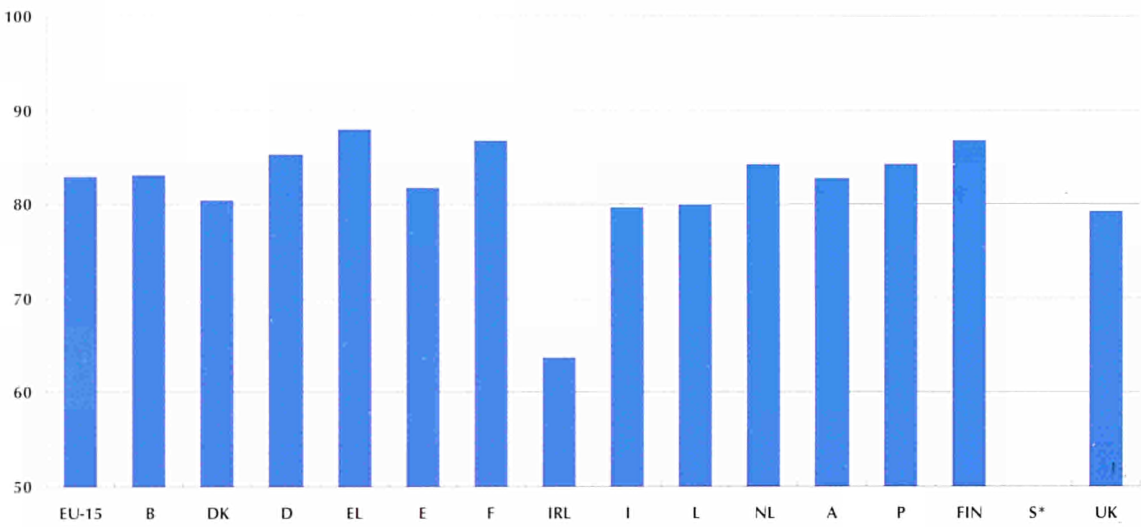
Figure 2.19

Capacity utilisation rates for the main industrial groupings, 04-99 (%)

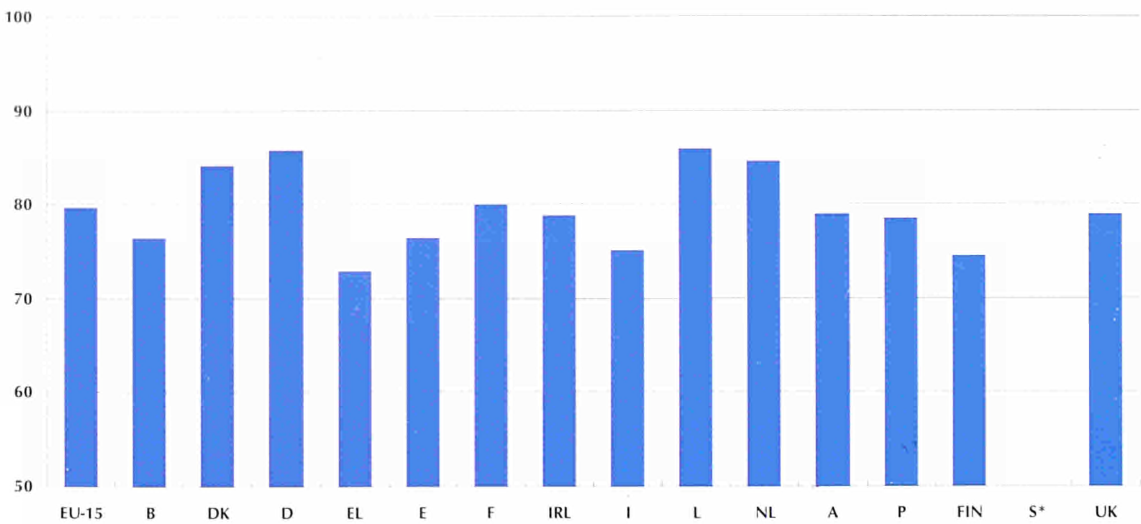
Intermediate goods



Capital goods



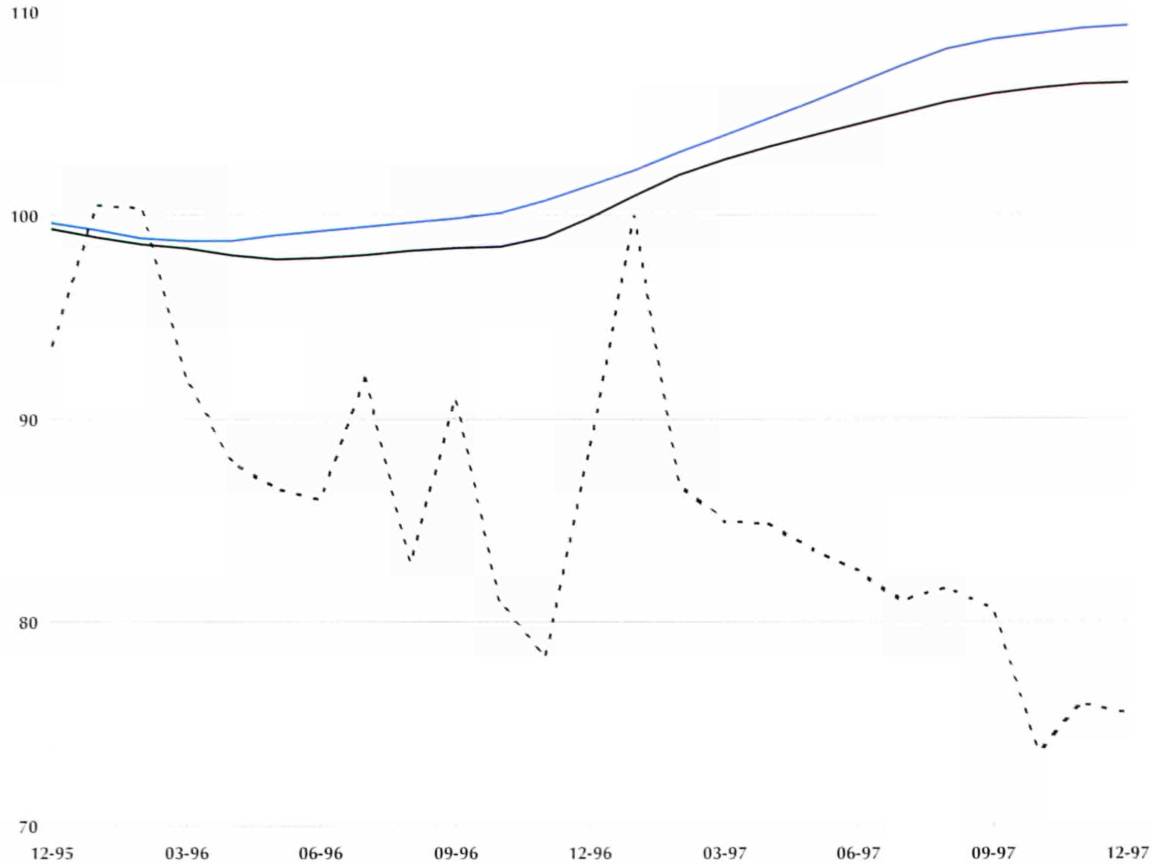
Consumer goods



Source: DG II, Business Survey

Figure 2.20

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



Source: eurostat

Table 2.13

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	10-97	⇨	12-97	0.8	0.2	1.0	-2.4	-7.5
B/L	09-97	⇨	11-97	-3.7	0.6	-2.4	-3.3	-0.5
DK	10-97	⇨	12-97	1.4	2.7	0.5	0.0	-9.0
D	10-97	⇨	12-97	0.9	0.0	0.9	-4.2	-3.1
EL	10-97	⇨	12-97	-2.4	-2.6	0.6	-16.3	-11.8
E	10-97	⇨	12-97	0.6	2.5	3.2	1.9	-7.8
F	10-97	⇨	12-97	0.8	1.9	1.4	-0.2	-4.9
IRL	08-97	⇨	10-97	7.1	5.6	4.1	3.0	1.5
I	10-97	⇨	12-97	1.4	-0.1	1.9	-14.3	-2.6
NL	10-97	⇨	12-97	-0.6	1.2	0.5	-1.9	3.3
A		⇨		:	:	:	:	:
P	08-97	⇨	10-97	2.3	0.4	3.5	0.9	-0.9
FIN		⇨		:	:	:	:	:
S		⇨		:	:	:	:	:
UK	10-97	⇨	12-97	-1.9	4.7	-1.8	-2.5	-14.1

Source: eurostat

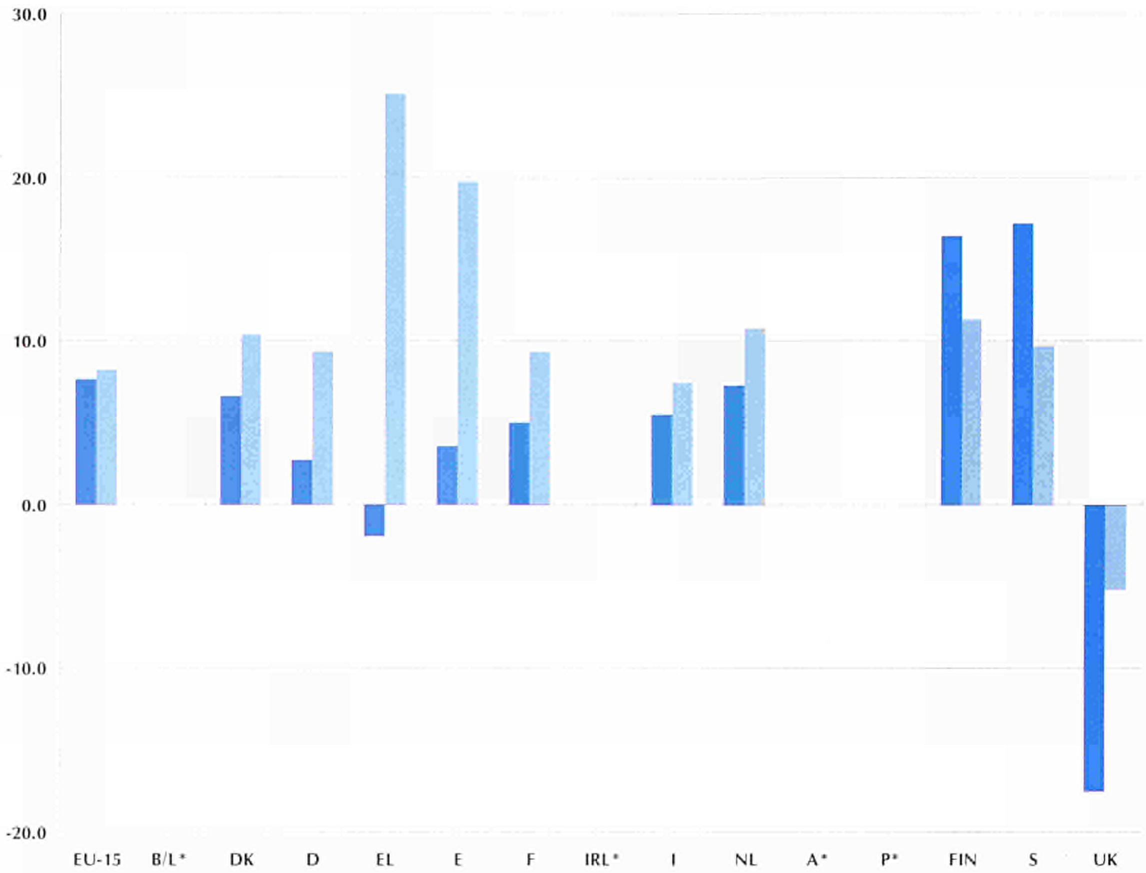


Figure 2.21

Foreign trade indices (in ECU terms): growth rate, three months compared to the same three months of the previous year, 10-97 to 12-97 (%)

Source: eurostat

Table 2.14

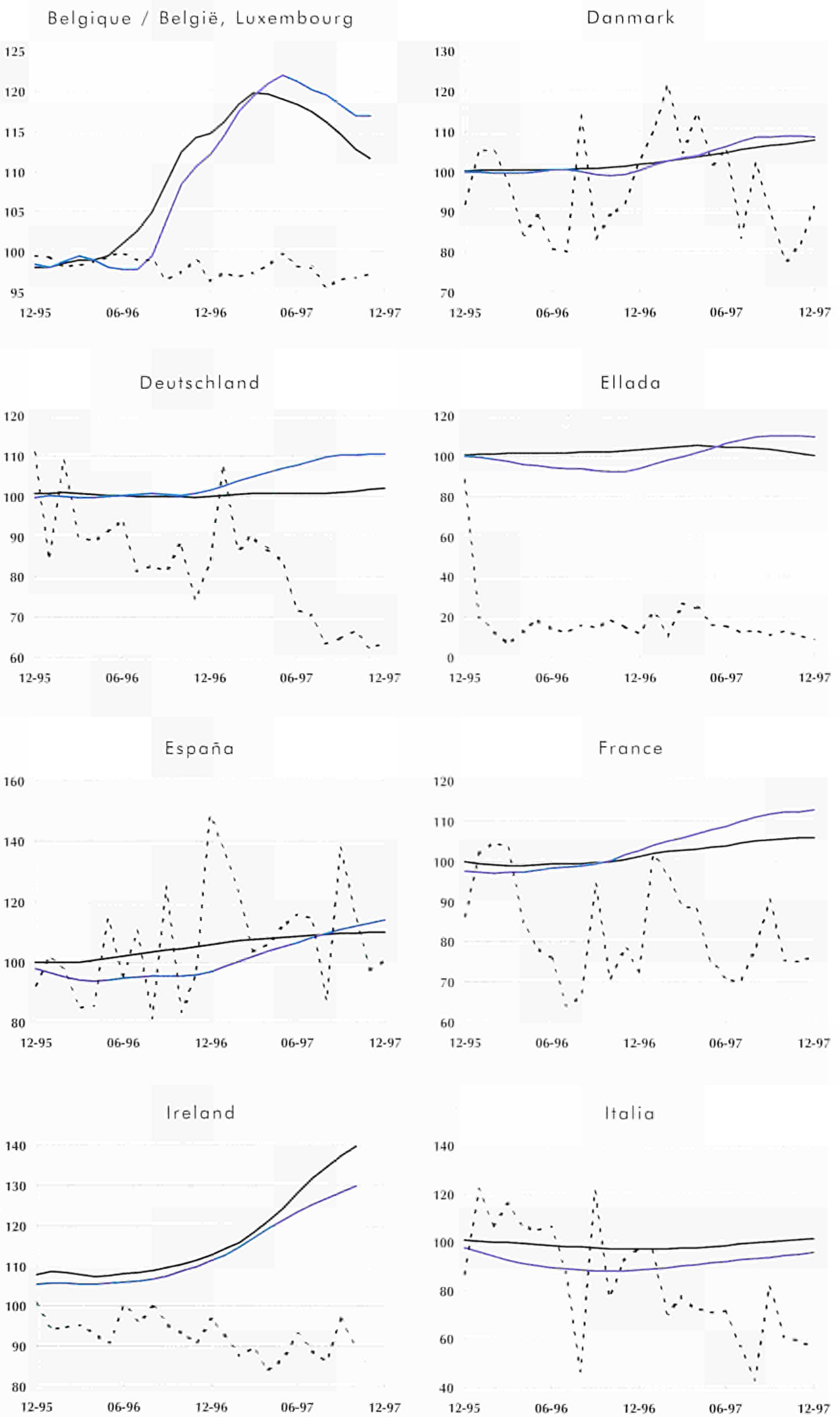
Foreign trade indices (value indices are in ECU terms): three months compared to the same three months of the previous year (%)

	Latest 3 months available			Exports Value	Exports Volume	Imports Value	Imports Volume	Terms of trade
EU-15	10-97	⇨	12-97	7.6	2.4	8.2	-6.0	-9.1
B/L	09-97	⇨	11-97	3.8	-1.5	6.7	0.5	-0.8
DK	10-97	⇨	12-97	6.6	15.1	10.4	4.8	-12.0
D	10-97	⇨	12-97	2.7	5.2	9.4	-11.7	-21.7
EL	10-97	⇨	12-97	-2.0	1.5	25.1	-7.4	-29.0
E	10-97	⇨	12-97	3.5	5.1	19.7	20.4	-4.4
F	10-97	⇨	12-97	5.0	9.2	9.4	17.6	2.3
IRL	08-97	⇨	10-97	28.3	31.3	20.2	17.1	-5.3
I	10-97	⇨	12-97	5.5	-0.3	7.5	-31.9	-33.6
NL	10-97	⇨	12-97	7.3	27.9	10.8	-6.1	-28.0
A		⇨		:	:	:	:	:
P	08-97	⇨	10-97	8.6	1.9	9.6	2.7	-0.6
FIN	10-97	⇨	12-97	16.4	7.8	11.3	19.2	:
S	10-97	⇨	12-97	17.2	-1.6	9.7	10.1	:
UK	10-97	⇨	12-97	-17.5	20.9	-5.2	-2.2	-30.4

Source: eurostat

Figure 2.22

Foreign trade indices in ECU terms (1995 = 100)



Export value index

Import value index

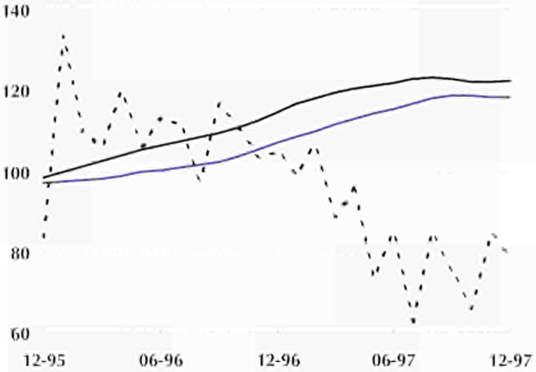
Terms of trade

Source: eurostat

Figure 2.22

Foreign trade indices in ECU terms (1995 = 100)

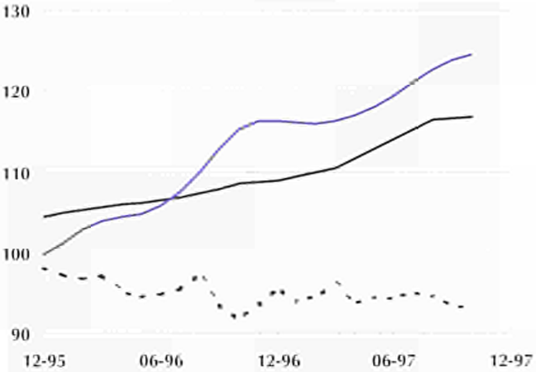
Nederland



Österreich

Not available

Portugal



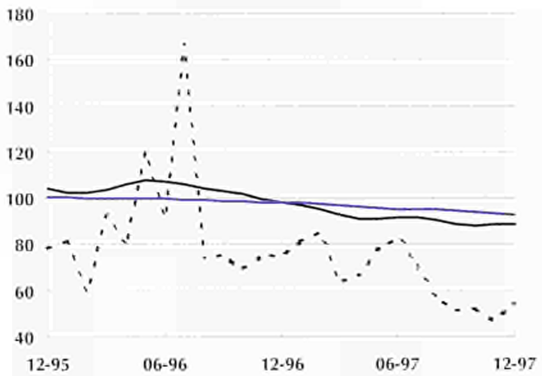
Suomi / Finland

Not available

Sverige

Not available

United Kingdom



Export value index

Import value index

Terms of trade

Source: eurostat

Further information - employment 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 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 109.

3. Latest outlook: construction

3. Latest outlook: construction

Construction activity

Construction activity in the EU was generally following a negative trend at the end of 1998 and start of 1999. EU activity in the construction sector fell by 3.2% in the final quarter of 1998 when compared to the final quarter of 1997, with a reduction of just 0.5% in the first quarter of 1999. Positive rates of change in construction activity were recorded in three countries (subject to data availability); they were Spain (10.1%, December 1998), France (0.1%, April 1999) and Finland (5.0%, March 1999).

After twelve successive months of decline construction activity turned positive in France in April 1999 (rising by just 0.1%). Of the other Member States only Belgium and Germany were able to provide data through until this date. German construction activity declined by 3.5% in the three months to April 1999. These figures also showed a slight improvement in the figures compared to the start of 1999, when German construction activity retracted by 4.4%.

Civil engineering and building

Looking in more detail at the production index by activity we find that civil engineering activity fell by 1.5% in the final quarter of 1998 (again compared to the final quarter of 1997). There was some optimism in the most recent data available, with French figures for April 1999 showing positive rates of growth (up by 1.9%).

The most recent data for building was not as encouraging, with negative rates still being recorded in France and Germany (again to April 1999), reductions of 3.9% and 5.1% were registered.

Output prices for residential buildings

Prices of residential buildings showed some signs of increasing (contrary to the trends seen for total industry producer prices). Indeed, data for the first quarter of 1999 showed that Germany was the only country reporting a decline in prices. Price increases in Greece and the United Kingdom were above the level of 4% per annum. EU-15 prices increased by 2.3% in March 1999 (compared to the first quarter of 1998).

More recent data is available for a number of countries, as well as the euro-zone[1], where prices increased by 1.1% per annum in the twelve months to March 1999. Figures for EUR-11 aggregate for the final quarter of 1998 had shown that prices were increasing at the rate of 0.3% per annum.

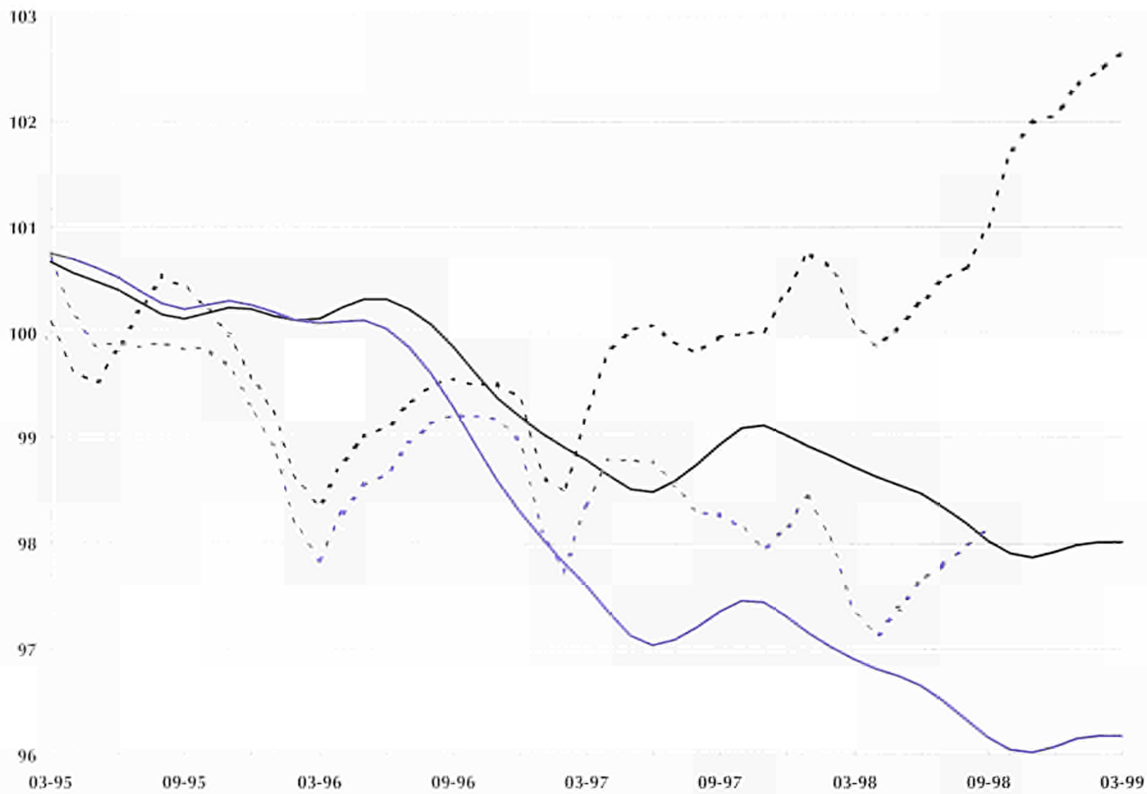
(1) Belgium, Germany, Spain, France, Ireland, Italy, Luxembourg, the Netherlands, Austria, Portugal and Finland make up the EUR-11 aggregate, otherwise known as the euro-zone.

Enquiries regarding the purchase of data should be directed to:

Eurostat Data-Shop
4, rue Alphonse Weicker
L-2721 Luxembourg
tel: (352) 43 35 22 51
fax: (352) 43 35 22 221
e-mail: dslux@eurostat.datashop.lu

Latest outlook: construction

Figure 3.1

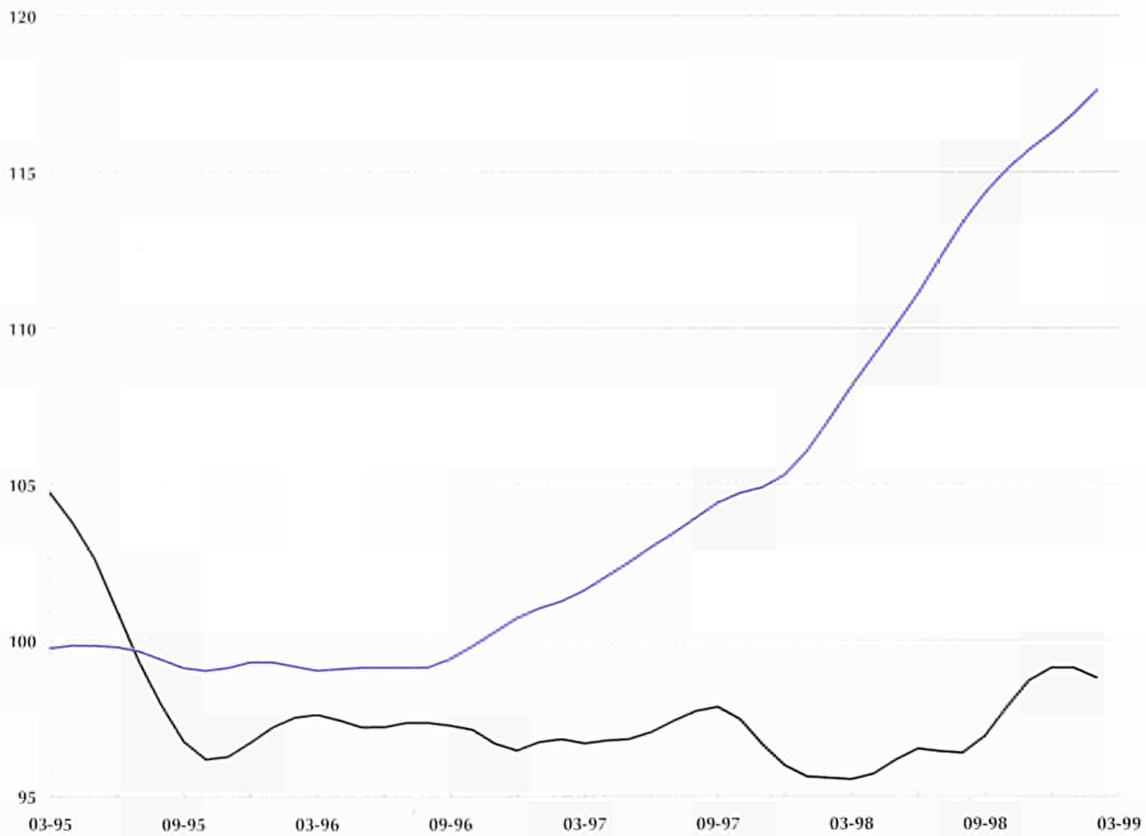


Production and employment trends in construction: indices (1995 = 100)

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

Source: eurostat

Figure 3.2



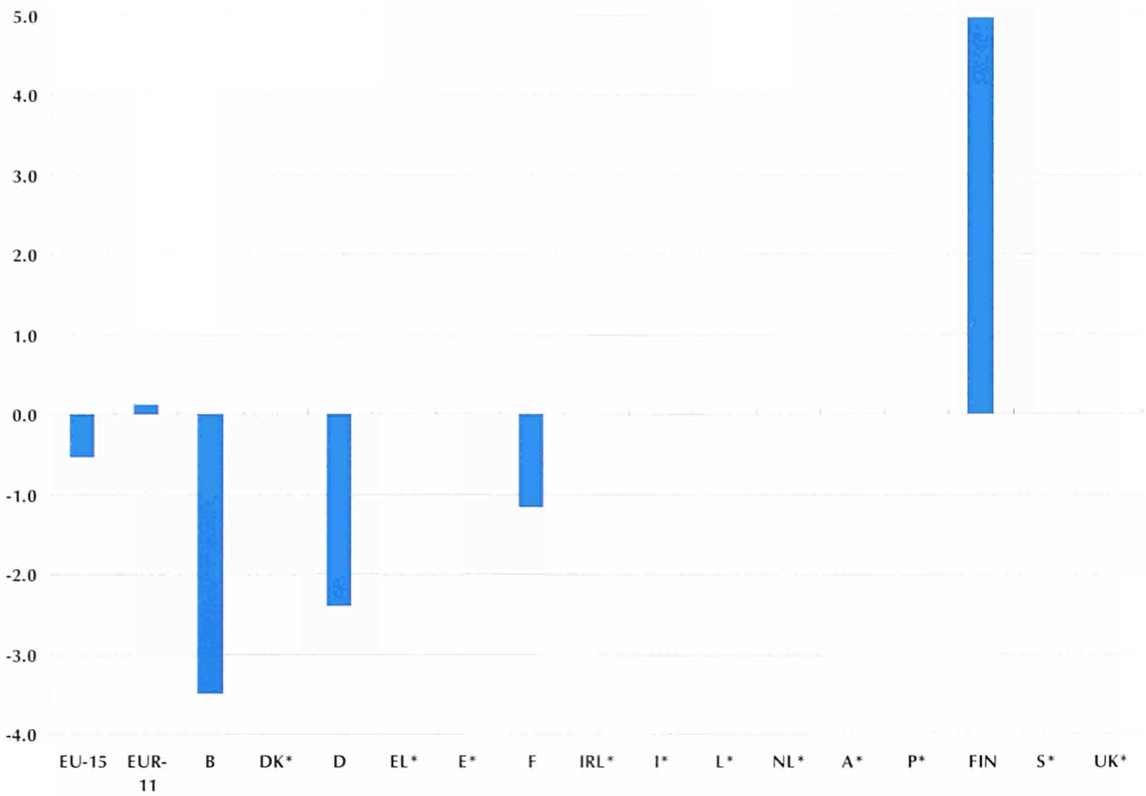
EU-15 building permits: indices (1995 = 100)

Residential
Non-residential

Source: eurostat

Figure 3.3

Production index for construction: growth rate, three months compared to the same three months of the previous year, 01-99 to 03-99 (%)



Source: eurostat

Table 3.1

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	04-98	⇨	06-98	-1.5	-1.8	10-98	⇨	12-98	-0.5	-1.5
EUR-11	10-98	⇨	12-98	-0.2	-3.1	10-98	⇨	12-98	-0.4	-1.0
B		⇨		:	:		⇨		:	:
DK	11-98	⇨	01-99	-5.5	-5.2	11-98	⇨	01-99	2.5	-0.4
D	02-99	⇨	04-99	-0.9	-5.1	02-99	⇨	04-99	0.1	-0.4
EL		⇨		:	:		⇨		:	:
E	10-98	⇨	12-98	1.7	11.1	10-98	⇨	12-98	-1.2	10.1
F	02-99	⇨	04-99	-1.4	-3.9	02-99	⇨	04-99	0.3	1.9
IRL		⇨		:	:		⇨		:	:
I	10-98	⇨	12-98	0.0	-15.5	07-98	⇨	09-98	-1.5	-0.9
L	10-98	⇨	12-98	-2.8	-6.3	10-98	⇨	12-98	-5.1	-9.4
NL	01-98	⇨	03-98	8.3	15.8		⇨		:	:
A	12-98	⇨	02-99	-0.5	-4.7	12-98	⇨	02-99	-3.0	-20.1
P		⇨		:	:		⇨		:	:
FIN	01-99	⇨	03-99	3.2	7.0	01-99	⇨	03-99	1.9	-0.3
S		⇨		:	:		⇨		:	:
UK	04-98	⇨	06-98	-2.7	1.7	04-98	⇨	06-98	-10.6	-12.6
NO	01-99	⇨	03-99	1.9	:	01-99	⇨	03-99	-1.4	:

Source: eurostat

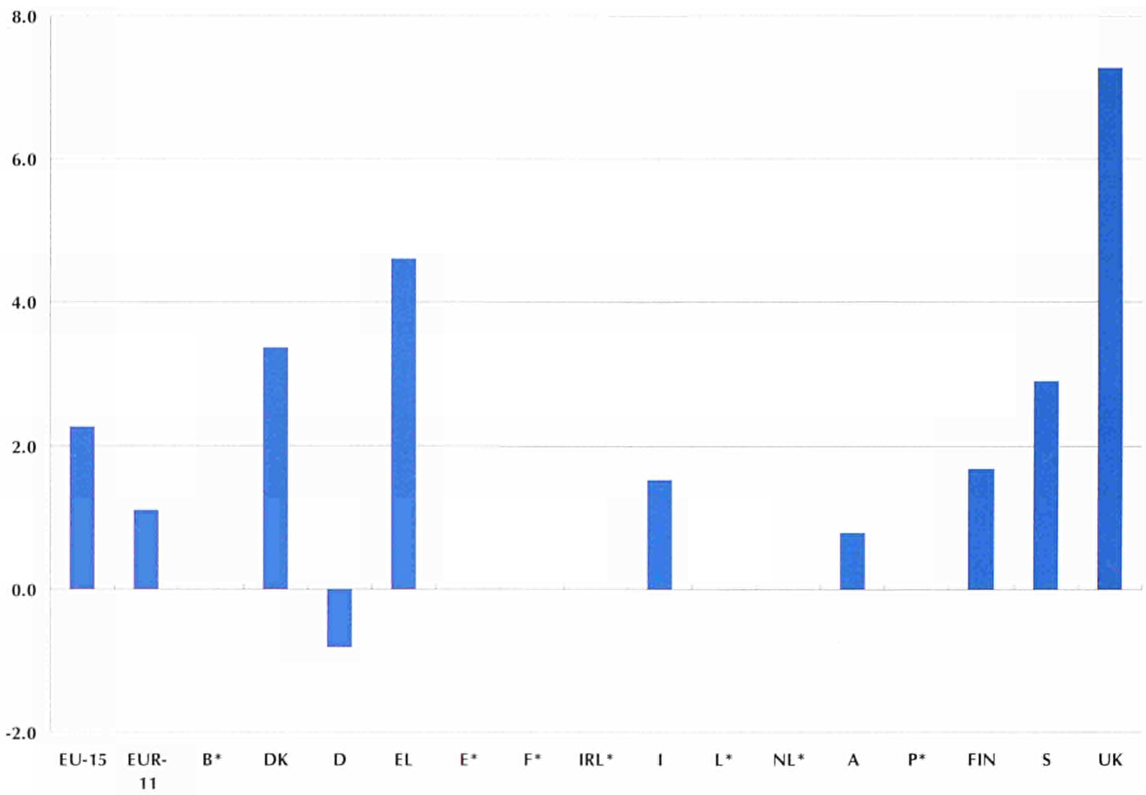


Figure 3.4

Output prices for new residential buildings: growth rate, three months compared to the same three months of the previous year, 01-99 to 03-99 (%)

Source: eurostat

Table 3.2

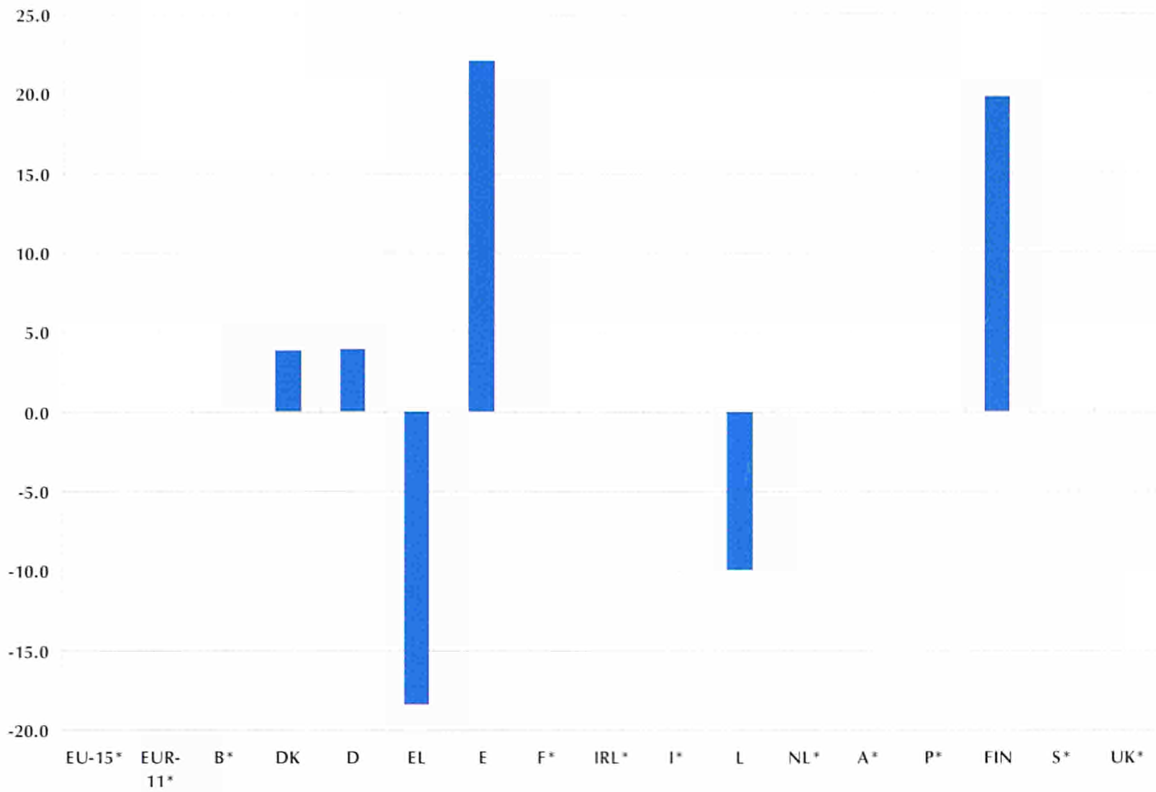
Output prices for new residential buildings: indices (1995 = 100)

	III-1997	IV-1997	I-1998	II-1998	III-1998	IV-1998	I-1999	II-1999
EU-15	104.5	104.7	104.2	104.8	105.7	106.2	106.6	:
EUR-11	103.0	103.1	102.4	102.8	103.0	103.4	103.5	:
B	:	:	:	:	:	:	:	:
DK	106.4	107.1	107.8	107.8	109.3	110.7	111.5	113.7
D	99.1	98.7	98.3	99.0	98.9	98.6	97.5	:
EL	111.9	113.2	115.8	117.2	119.2	119.6	121.1	:
E	:	:	:	:	:	:	:	:
F	104.8	104.9	104.0	104.0	103.9	105.5	:	:
IRL	105.6	106.7	107.5	108.3	109.7	:	:	:
I	105.0	105.3	102.1	102.6	103.2	103.6	103.7	:
L	102.7	102.7	103.9	103.9	104.7	104.7	:	:
NL	106.3	108.0	108.0	108.9	:	:	:	:
A	103.1	103.1	103.7	104.0	104.1	104.1	104.5	:
P	:	:	:	:	:	:	:	:
FIN	103.7	103.7	103.9	104.6	105.1	105.3	105.6	:
S	106.3	106.9	107.2	108.6	109.5	109.9	110.3	:
UK	107.0	109.0	110.0	112.0	114.0	116.0	118.0	:
NO	:	:	:	:	:	:	:	:

Source: eurostat

Figure 3.5

Building permits - useful floor area: growth rate, three months compared to the same three months of the previous year, 11-98 to 01-99 (%)



Source: eurostat

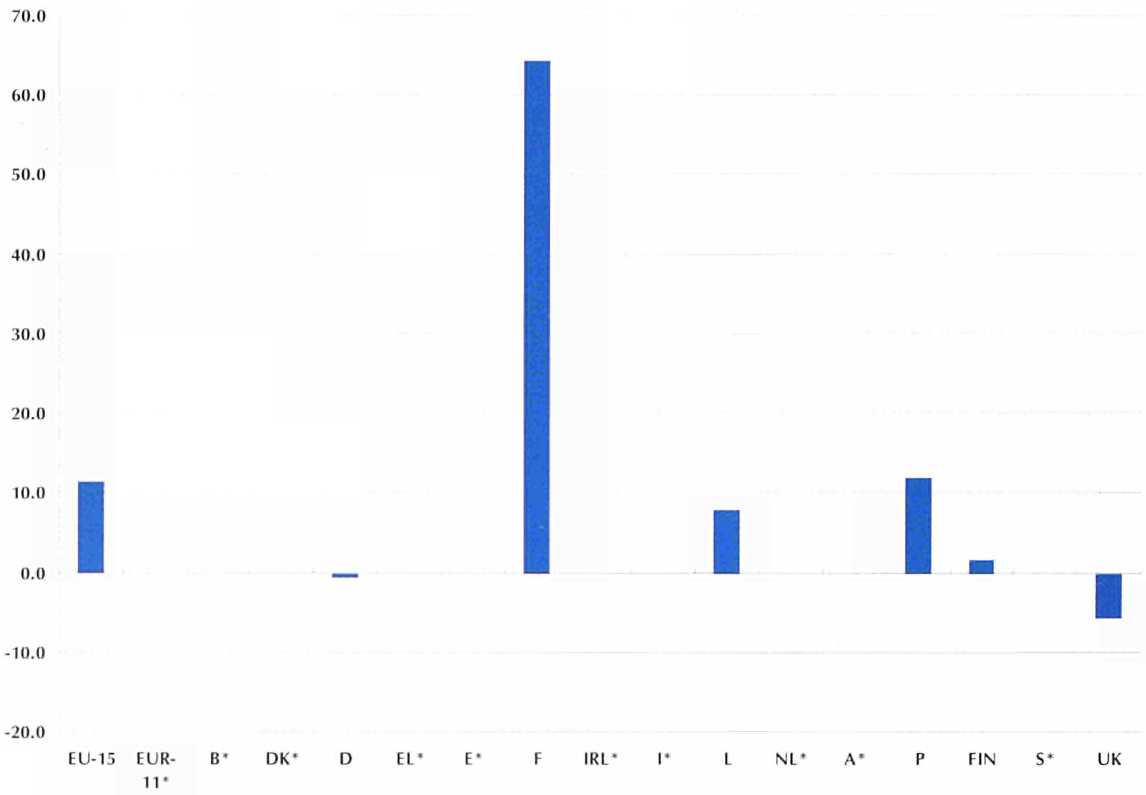
Table 3.3

Building permits - useful floor area: actual values and indices

	Latest 3 months available			Residential '000m²	1995 = 100	Latest 3 months available			Non-residential '000m²	1995 = 100
EU-15		⇨		:	:	12-98	⇨	02-99	:	104.0
EUR-11		⇨		:	:	12-98	⇨	02-99	:	102.9
B	10-98	⇨	12-98	1,866	84.5	10-98	⇨	12-98	2,086	130.6
DK	11-98	⇨	01-99	466	121.8	11-98	⇨	01-99	1,037	97.9
D	12-98	⇨	02-99	10,645	77.2	12-98	⇨	02-99	9,623	89.3
EL	11-98	⇨	01-99	2,817	133.1	11-98	⇨	01-99	1,084	111.2
E	11-98	⇨	01-99	15,304	136.0	11-98	⇨	01-99	3,476	170.3
F		⇨		:	:	03-99	⇨	05-99	10,291	114.8
IRL	01-99	⇨	03-99	1,761	187.2	01-99	⇨	03-99	1,002	154.0
I	10-98	⇨	12-98	2,645	70.2	10-98	⇨	12-98	4,522	77.8
L	01-99	⇨	03-99	:	94.2	01-99	⇨	03-99	:	104.2
NL	08-98	⇨	10-98	3,965	100.4	08-98	⇨	10-98	6,087	172.1
A		⇨		:	:		⇨		:	:
P		⇨		:	:		⇨		:	:
FIN	02-99	⇨	04-99	980	208.5	02-99	⇨	04-99	843	148.4
S	03-99	⇨	05-99	326	:	03-99	⇨	05-99	491	:
UK		⇨		:	:		⇨		:	:
NO	12-98	⇨	02-99	660	84.1	12-98	⇨	02-99	776	77.8

Source: eurostat

Figure 3.6



Building permits - no. of dwellings: growth rate, three months compared to the same three months of the previous year, 12-98 to 02-99 (%)

Source: eurostat

Table 3.4

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		:	02-99	:	:	88.3
EUR-11		:	01-99	:	:	88.1
B	1997	50,847	11-98	2,637	:	70.4
DK	1998	16,349	01-99	800	:	83.1
D	1998	477,707	02-99	28,652	:	53.8
EL	1998	97,259	01-99	5,897	:	99.9
E	1998	364,086	01-99	22,407	:	95.2
F	1998	377,658	05-99	23,777	:	92.5
IRL	1998	47,389	03-99	:	:	172.4
I	1998	92,051	12-98	9,450	:	65.3
L	1998	3,215	03-99	469	:	210.3
NL	1997	101,501	10-98	8,319	:	101.4
A		:		:	:	:
P	1998	107,221	04-99	9,817	:	153.1
FIN	1998	32,468	04-99	3,517	:	224.0
S	1998	12,104	05-99	788	:	:
UK	1998	176,700	04-99	16,600	:	118.8
NO	1998	22,017	02-99	1,215	:	67.8

Source: eurostat

4. Latest outlook: services

4. Latest outlook: services

New vehicle registrations

In Europe the number of new vehicle registrations increased by 9.1% in the three months to May 1999 (compared to the same period the year before). This positive rate of change was part of a general trend of expansion seen in the data since April 1997. There was an increase in the rate of change for the number of new car registrations compared to March 1999 (when figures rose by 6.3%).

Several Member States recorded higher growth rates for new vehicle registrations (again for May 1999, except otherwise stated). The highest rates were found in Greece (39.3%), Finland (16.0%) and Sweden (14.5%, for May 1999). Whilst in the latter two countries the index grew at a faster pace than in previous months, in Greece the latest figure reported a slower pace of expansion (when compared to the first months of 1999). A similar trend was evident in Belgium, where despite new vehicle registrations growing at a positive rate (up by 7.3% in April 1999), the index slowed down compared to the start of the year. In Germany new vehicle registrations increased by 7.4% in May 1999, a rate of growth which reversed the slight reduction registered during the month of March 1999 (down by 0.5%).

Retail trade

In the three months to April 1999 the European index of retail sales volumes continued its upward trend (when compared to the same three months of the year before). Growth was slightly faster for the EUR-11[1] aggregate than the data posted for EU-15 (with increases of 3.7% and 3.4% respectively). The retail sales index displayed a fairly constant trend when compared to March 1999.

Within the larger Member States, retail sales volumes were generally positive, increasing by between 7.6% in Italy (for April 1999) and 1.8% in the United Kingdom (for April 1999). There was one exception to this rule, in Germany the index remained almost unchanged (up by 0.1% in April 1999). There had been signs of an expansion of retail sales in Germany during the first three months of 1999, which was not confirmed by the evolution in April 1999. Indeed, German retail sales continued to show moderate or no growth throughout the latter part of 1998 up to the spring of 1999 (except for a slight increase around Christmas 1998). France was the only larger economy reporting considerably higher increases in retail sales' volumes on a continued basis (latest figures showed an increase of 4.7% in April 1999). French retail sales volumes increased at the same pace as during the winter of 1998, whilst in Italy growth expanded to over 7% during the spring of 1999 from a figure of just 0.9% during the final quarter of 1998.

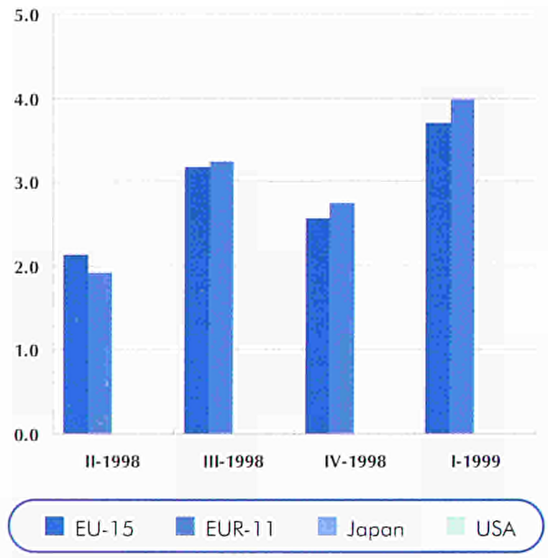
(1) Belgium, Germany, Spain, France, Ireland, Italy, Luxembourg, the Netherlands, Austria, Portugal and Finland make up the EUR-11 aggregate, otherwise known as the euro-zone.

Enquiries regarding the purchase of data should be directed to:

Eurostat Data-Shop
4, rue Alphonse Weicker
L-2721 Luxembourg
tel: (352) 43 35 22 51
fax: (352) 43 35 22 221
e-mail: dslux@eurostat.datashop.lu

Figure 4.1

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



Source: eurostat

A breakdown of the retail sales activity showed that there was faster growth of sales volumes for household equipment than there was for food, beverages and tobacco. Within the larger Member States sales volumes of household equipment increased by rates above the level of 6% (although no fresh data existed for Germany). The highest rate of growth was recorded in Italy where sales volumes increased by 8.6% (April 1999). In the United Kingdom the rate of growth for household equipment (6.3%, May 1999) was well above the average for the whole of retail sales (1.8%, April 1999). Within the smaller Member States there was a more varied picture across activities. In the Netherlands, retail sales of household equipment grew by 8.8% and in Sweden at an even faster pace of 11.2% (to May and April 1999), whilst in Greece there was a negative rate of change (down by 0.5%, March 1999). Greek retail sales of household equipment were on a downward trend for the sixth consecutive month, although declining at a slower pace when compared to the start of 1999.

The EU figures for the retail sale of textiles, clothing, footwear and leather goods displayed a similar evolution to that of household equipment. Spanish figures reported only moderate increases of 0.4% (for April 1999), recovering somewhat after the downward trend observed during the first three months of 1999. In Austria where sales volumes of textiles, clothing, footwear and leather goods were also decreasing, the index displayed a negative rate of change equal to 8.5% in March 1999 (negative growth recorded since December 1998).

Within the retail sale of food, beverages and tobacco sales' volumes grew more moderately: in the United Kingdom by 0.6% (May 1999) and in Spain by 0.4% (April 1999). Although the Italian rate of growth was equal to 5.5% (April 1999), the activity was still growing at a slower pace than the Italian aggregate for the whole of retail trade. Within the smaller Member States rates of change ranged from growth of 3.6% in Ireland to reductions of 0.7% and 0.2% in Denmark and the Netherlands (to April 1999).

Figure 4.2

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

Not available

EU-15 EUR-11 Japan USA

Source: eurostat

Table 4.1

Volume of retail sales: indices, working day adjusted (1995 = 100)

	1996	1997	1998	12-98	01-99	02-99	03-99	04-99	05-99
EU-15	100.8	102.6	105.4	135.7	99.4	99.2	105.9	105.4	:
EUR-11	100.3	101.4	104.2	133.2	98.0	98.2	105.8	104.7	:
B	101.4	104.4	109.2	125.9	:	:	:	:	:
DK	101.2	103.3	105.5	135.7	101.9	94.7	103.9	96.8	:
D	98.8	97.0	97.6	119.5	89.5	92.5	101.9	93.8	:
EL	101.2	102.4	104.1	145.3	102.5	102.0	92.9	:	:
E	98.3	100.3	106.4	134.0	108.4	101.3	101.5	103.2	:
F	101.2	104.2	108.8	134.7	104.4	104.5	107.1	110.5	:
IRL	106.7	114.9	125.1	155.0	131.1	129.4	131.1	:	:
I	100.7	101.9	102.9	148.1	95.5	97.3	107.4	109.0	:
L	98.6	105.4	107.2	110.1	:	:	:	:	:
NL	103.0	107.0	111.4	130.0	101.4	96.1	111.8	112.3	118.7
A	101.3	102.6	105.0	136.9	92.5	96.9	103.8	:	:
P	:	:	:	:	:	:	:	:	:
FIN	104.1	108.3	113.9	150.7	101.7	97.5	112.9	:	:
S	100.7	103.0	106.6	141.7	100.2	95.8	111.8	105.7	:
UK	103.3	108.5	111.9	147.1	105.7	105.3	107.4	108.7	:
NO	102.7	106.3	:	:	:	:	:	:	:
Japan	:	:	:	:	:	:	:	:	:
USA	:	:	:	:	:	:	:	:	:

Source: eurostat

Table 4.2

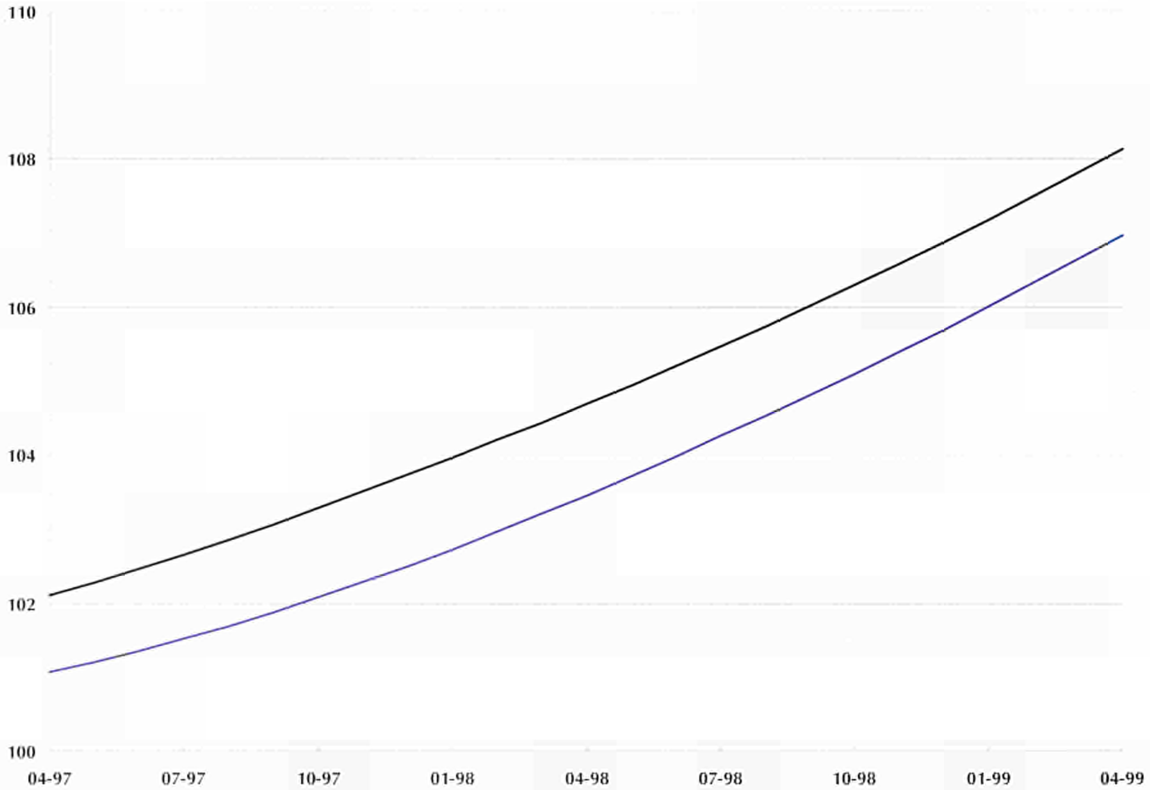
Volume of retail sales: indices, seasonally adjusted data (1995 = 100)

	1996	1997	1998	12-98	01-99	02-99	03-99	04-99	05-99
EU-15	100.8	102.6	105.4	106.6	107.3	107.5	108.2	107.8	:
EUR-11	100.3	101.4	104.2	105.6	106.1	106.4	106.9	106.9	:
B	101.4	104.4	109.2	107.4	:	:	:	:	:
DK	101.2	103.3	105.5	107.5	106.7	107.8	112.2	101.7	:
D	98.8	97.0	97.6	95.2	100.0	98.3	102.4	94.4	:
EL	101.2	102.4	104.1	106.6	106.9	106.3	:	:	:
E	98.3	100.3	106.4	107.1	107.0	107.5	109.7	106.9	:
F	101.2	104.2	108.8	108.1	111.0	111.6	113.5	111.9	:
IRL	106.7	114.9	125.1	127.6	133.4	133.6	137.2	:	:
I	100.7	101.9	102.9	105.1	108.4	108.5	108.8	109.1	:
L	98.6	105.4	107.2	108.8	:	:	:	:	:
NL	103.0	107.0	111.4	112.2	110.3	111.8	114.7	114.2	114.1
A	101.3	102.6	105.0	104.1	103.8	102.3	107.8	:	:
P	:	:	:	:	:	:	:	:	:
FIN	104.1	108.3	113.9	117.7	115.9	114.1	119.3	:	:
S	100.7	103.0	106.6	108.2	110.4	110.5	112.4	110.4	:
UK	103.3	108.5	111.9	111.8	113.3	113.0	113.7	113.1	:
NO	102.7	106.3	:	:	:	:	:	:	:
Japan	:	:	:	:	:	:	:	:	:
USA	:	:	:	:	:	:	:	:	:

Source: eurostat

Figure 4.3

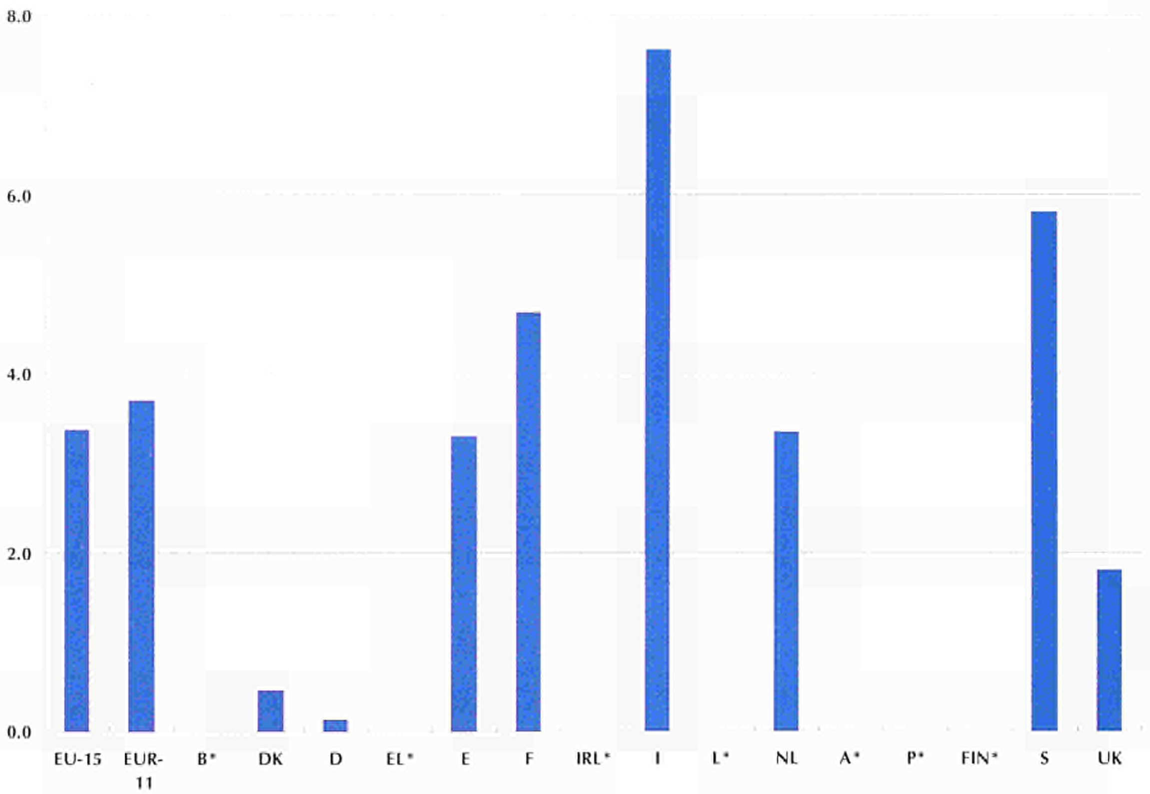
Volume of retail sales (1995 = 100)



Source: eurostat

Figure 4.4

Volume of retail sales: growth rate, three months compared to the same three months of the previous year, 02-99 to 04-99 (%)



Source: eurostat

Table 4.3

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

	1998	12-98	01-99	02-99	03-99	04-99	05-99	Latest 3 months available	t / t-1 (%)	t / t-4 (%)
EU-15	104.5	128.8	:	:	:	:	:	10-98 ⇨ 12-98	0.6	2.7
EUR-11	103.8	130.4	:	:	:	:	:	10-98 ⇨ 12-98	0.7	3.0
B	109.2	126.1	:	:	:	:	:	10-98 ⇨ 12-98	0.2	0.6
DK	101.5	118.5	93.0	98.2	103.5	93.8	:	02-99 ⇨ 04-99	0.7	-0.7
D	96.6	115.2	:	:	:	:	:	10-98 ⇨ 12-98	1.0	1.9
EL	105.0	137.9	100.5	102.7	104.2	:	:	01-99 ⇨ 03-99	0.6	3.4
E	101.5	127.5	93.5	96.6	96.6	97.2	:	02-99 ⇨ 04-99	-1.3	0.4
F	108.1	132.6	98.7	105.5	104.9	109.2	:	02-99 ⇨ 04-99	0.9	4.8
IRL	111.5	134.8	105.1	107.0	109.0	:	:	01-99 ⇨ 03-99	1.0	3.6
I	107.2	155.3	106.0	100.3	114.3	114.9	:	02-99 ⇨ 04-99	1.5	5.5
L	:	:	:	:	:	:	:	⇨	:	:
NL	103.3	114.2	93.1	100.9	99.3	102.2	105.2	03-99 ⇨ 05-99	0.4	-0.2
A	99.1	113.7	91.0	99.8	100.3	:	:	01-99 ⇨ 03-99	1.2	2.3
P	:	:	:	:	:	:	:	⇨	:	:
FIN	107.3	129.2	96.2	99.2	105.8	:	:	01-99 ⇨ 03-99	0.9	3.2
S	101.5	122.9	94.7	90.6	104.7	100.5	:	02-99 ⇨ 04-99	0.1	1.6
UK	108.9	121.6	102.8	108.4	109.1	107.7	109.2	03-99 ⇨ 05-99	0.3	0.6
NO	:	:	:	:	:	:	:	10-97 ⇨ 12-97	0.0	-0.9
Japan	:	:	:	:	:	:	:	⇨	:	:
USA	:	:	:	:	:	:	:	⇨	:	:

Source: eurostat

Table 4.4

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

	1998	12-98	01-99	02-99	03-99	04-99	05-99	Latest 3 months available	t / t-1 (%)	t / t-4 (%)
EU-15	103.4	144.9	:	:	:	:	:	10-98 ⇨ 12-98	0.3	0.0
EUR-11	101.3	136.9	:	:	:	:	:	10-98 ⇨ 12-98	0.1	0.0
B	105.8	118.1	:	:	:	:	:	10-98 ⇨ 12-98	0.8	2.3
DK	107.6	158.4	120.6	79.4	90.6	103.9	:	02-99 ⇨ 04-99	0.9	6.3
D	94.3	118.9	:	:	:	:	:	10-98 ⇨ 12-98	-1.2	-2.6
EL	97.6	147.1	108.2	92.9	65.3	:	:	01-99 ⇨ 03-99	0.3	6.7
E	101.1	127.6	125.5	86.8	91.8	97.9	:	02-99 ⇨ 04-99	0.6	0.4
F	109.0	140.0	131.7	79.8	98.4	107.8	:	02-99 ⇨ 04-99	1.0	4.1
IRL	144.2	274.3	153.5	117.9	123.5	:	:	01-99 ⇨ 03-99	3.9	15.0
I	100.4	153.7	90.7	80.7	100.2	107.1	:	02-99 ⇨ 04-99	1.4	8.9
L	105.7	100.9	:	:	:	:	:	10-98 ⇨ 12-98	-2.8	-0.2
NL	109.3	132.0	104.9	73.3	104.6	108.0	117.1	03-99 ⇨ 05-99	-0.2	2.0
A	104.0	145.0	88.6	62.4	97.4	:	:	01-99 ⇨ 03-99	-0.3	-8.5
P	:	:	:	:	:	:	:	⇨	:	:
FIN	111.6	144.5	109.7	88.2	101.8	:	:	01-99 ⇨ 03-99	0.5	2.4
S	103.7	147.5	93.7	78.7	100.5	107.8	:	02-99 ⇨ 04-99	2.9	9.2
UK	112.5	177.7	99.8	90.5	96.8	105.2	109.9	03-99 ⇨ 05-99	0.9	3.1
NO	:	:	:	:	:	:	:	10-97 ⇨ 12-97	0.8	4.8
Japan	:	:	:	:	:	:	:	⇨	:	:
USA	:	:	:	:	:	:	:	⇨	:	:

Source: eurostat

Table 4.5

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

	1998	12-98	01-99	02-99	03-99	04-99	05-99	Latest 3 months available			t / t-1 (%)	t / t-4 (%)
EU-15	107.6	139.0	:	:	:	:	:	10-98	⇨	12-98	0.5	3.2
EUR-11	104.9	133.7	:	:	:	:	:	10-98	⇨	12-98	0.6	2.9
B	109.3	135.1	:	:	:	:	:	10-98	⇨	12-98	0.6	5.3
DK	:	:	:	:	:	:	:		⇨		:	:
D	98.4	120.2	:	:	:	:	:	10-98	⇨	12-98	-0.4	0.0
EL	113.7	157.4	100.8	96.7	98.0	:	:	01-99	⇨	03-99	-0.1	-0.5
E	114.3	136.5	108.8	113.9	112.5	118.3	:	02-99	⇨	04-99	1.5	6.0
F	112.9	149.0	106.5	111.2	113.7	116.3	:	02-99	⇨	04-99	1.6	6.7
IRL	130.6	198.3	131.1	121.9	121.1	:	:	01-99	⇨	03-99	3.0	11.5
I	98.0	129.7	84.7	106.6	101.4	99.4	:	02-99	⇨	04-99	2.4	8.6
L	121.7	122.8	:	:	:	:	:	10-98	⇨	12-98	1.9	4.1
NL	123.3	156.1	118.0	111.8	130.0	124.1	134.8	03-99	⇨	05-99	1.8	8.8
A	104.0	149.9	85.4	90.1	101.1	:	:	01-99	⇨	03-99	0.0	-2.4
P	:	:	:	:	:	:	:		⇨		:	:
FIN	125.9	160.1	97.9	98.6	116.9	:	:	01-99	⇨	03-99	0.1	3.9
S	114.9	175.5	116.1	103.8	117.9	101.5	:	02-99	⇨	04-99	2.8	11.2
UK	125.1	168.8	137.8	127.0	121.9	125.9	122.8	03-99	⇨	05-99	1.5	6.3
NO	:	:	:	:	:	:	:	10-97	⇨	12-97	1.6	6.1
Japan	:	:	:	:	:	:	:		⇨		:	:
USA	:	:	:	:	:	:	:		⇨		:	:

Source: eurostat

Table 4.6

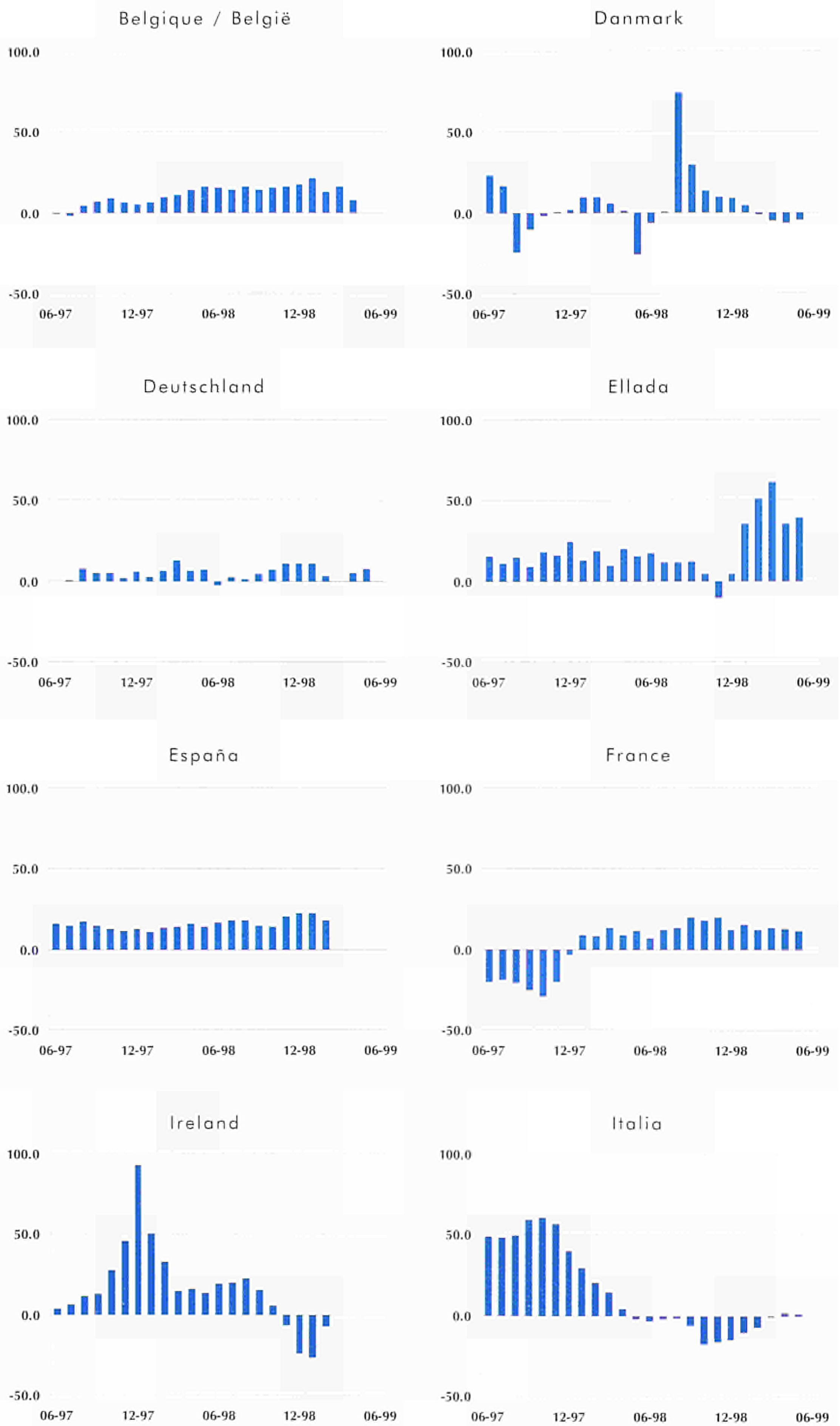
First registration of private and commercial cars: units and latest growth rates (thousands)

	1998	01-99	02-99	03-99	04-99	05-99	06-99	Latest 3 months available			t / t-1 (%)	t / t-4 (%)
EU-15	:	:	:	:	:	:	:	03-99	⇨	05-99	2.8	:
EUR-11	:	:	:	:	:	:	:		⇨		:	:
B	:	60	46	56	49	:	:	02-99	⇨	04-99	0.3	7.3
DK	:	10	12	17	13	13	:	03-99	⇨	05-99	-7.0	-4.9
D	:	273	269	430	368	334	:	03-99	⇨	05-99	0.5	7.4
EL	:	31	18	24	25	23	:	03-99	⇨	05-99	10.4	39.3
E	:	89	111	:	:	:	:	12-98	⇨	02-99	4.1	18.2
F	:	157	158	206	187	148	:	03-99	⇨	05-99	0.9	11.4
IRL	:	14	19	:	:	:	:	12-98	⇨	02-99	2.0	-7.2
I	:	235	226	248	217	214	:	03-99	⇨	05-99	2.4	1.1
L	:	3	4	5	4	4	:	03-99	⇨	05-99	-1.4	9.8
NL	:	:	:	:	:	:	:	10-98	⇨	12-98	-1.6	21.7
A	:	:	:	:	:	:	:	10-98	⇨	12-98	0.1	22.3
P	:	31	:	:	:	:	:	11-98	⇨	01-99	5.0	24.0
FIN	:	15	10	13	14	13	:	03-99	⇨	05-99	2.3	16.0
S	:	20	23	31	27	29	31	04-99	⇨	06-99	6.3	11.4
UK	:	:	:	:	:	:	:	10-98	⇨	12-98	2.4	4.2
NO	:	:	:	:	:	:	:	10-97	⇨	12-97	4.6	3.2
Japan	:	:	:	:	:	:	:		⇨		:	:
USA	:	:	:	:	:	:	:		⇨		:	:

Source: eurostat

Figure 4.5

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



Source: eurostat

eurostat

Latest outlook: services

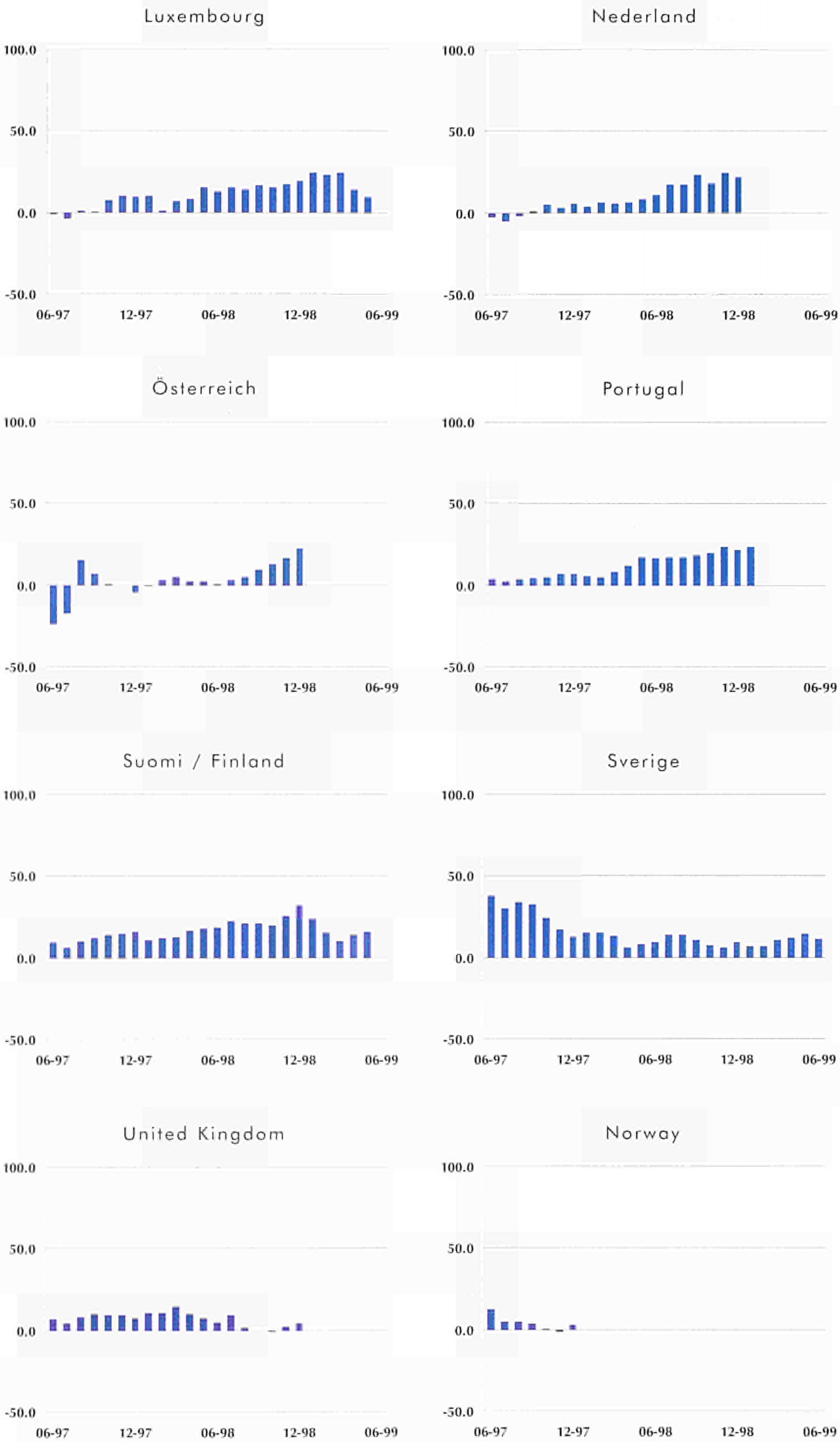


Figure 4.5

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

Source: eurostat

Table 4.7

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

	1998	10-98	11-98	12-98	01-99	02-99	03-99	Latest 3 months available			t / t-4 (%)
EU-15	:	:	:	:	:	:	:		⇨		:
EUR-11	:	:	:	:	:	:	:		⇨		:
B	3,451	255	230	230	150	204	173	01-99	⇨	03-99	-6.8
DK	4,339	417	390	239	:	:	:	10-98	⇨	12-98	5.5
D	147,276	14,553	9,291	9,119	8,242	8,955	10,095	01-99	⇨	03-99	5.9
EL	13,984	827	767	761	:	:	:	10-98	⇨	12-98	-2.9
E	66,471	5,402	3,998	3,721	3,942	4,568	5,812	01-99	⇨	03-99	28.1
F	96,696	7,926	5,810	5,929	:	:	:	10-98	⇨	12-98	3.9
IRL	:	:	:	:	:	:	:		⇨		:
I	125,603	6,666	4,860	5,829	:	:	:	10-98	⇨	12-98	3.9
L	81	6	6	5	:	:	:	10-98	⇨	12-98	-12.8
NL	:	:	:	:	:	:	:	10-97	⇨	12-97	13.7
A	16,483	1,110	800	979	:	:	:	10-98	⇨	12-98	6.3
P	9,164	668	523	518	:	:	:	10-98	⇨	12-98	7.1
FIN	9,420	759	720	567	565	666	:	12-98	⇨	02-99	-1.2
S	:	:	:	:	:	:	:	10-97	⇨	12-97	4.5
UK	81,060	7,700	5,270	4,870	:	:	:	10-98	⇨	12-98	-12.1
NO	11,252	989	926	632	735	883	1,035	01-99	⇨	03-99	4.0

Source: eurostat

Table 4.8

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

	1998	10-98	11-98	12-98	01-99	02-99	03-99	Latest 3 months available			t / t-4 (%)
EU-15	:	:	:	:	:	:	:		⇨		:
EUR-11	:	:	:	:	:	:	:		⇨		:
B	9,360	848	643	574	531	582	667	01-99	⇨	03-99	-3.5
DK	4,462	318	251	195	:	:	:	10-98	⇨	12-98	0.6
D	29,738	2,805	1,979	1,732	1,663	2,059	2,304	01-99	⇨	03-99	7.1
EL	42,565	3,814	409	269	:	:	:	10-98	⇨	12-98	5.6
E	111,738	10,837	4,903	4,362	6,354	6,849	8,290	01-99	⇨	03-99	37.2
F	66,330	5,656	3,034	3,348	:	:	:	10-98	⇨	12-98	6.7
IRL	:	:	:	:	:	:	:		⇨		:
I	86,399	7,788	3,142	2,734	:	:	:	10-98	⇨	12-98	3.6
L	1,089	:	:	:	:	:	:	06-98	⇨	08-98	4.4
NL	:	:	:	:	:	:	:	10-97	⇨	12-97	18.8
A	53,499	2,715	1,156	4,169	:	:	:	10-98	⇨	12-98	0.5
P	23,241	2,110	1,210	958	:	:	:	10-98	⇨	12-98	7.9
FIN	3,211	181	200	214	220	177	:	12-98	⇨	02-99	-6.3
S	:	:	:	:	:	:	:	10-97	⇨	12-97	7.2
UK	86,631	7,900	4,370	4,350	3,700	3,270	:	12-98	⇨	02-99	1.6
NO	5,168	181	146	196	297	436	406	01-99	⇨	03-99	1.7

Source: eurostat

Table 4.9

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

	1998	10-98	11-98	12-98	01-99	02-99	03-99	Latest 3 months available			t / t-4 (%)
EU-15	:	:	:	:	:	:	:		⇨		:
EUR-11	:	:	:	:	:	:	:		⇨		:
B	9,514	521	432	394	208	392	352	01-99	⇨	03-99	-13.6
DK	10,543	545	201	100	:	:	:	10-98	⇨	12-98	8.1
D	89,095	7,604	2,922	2,975	3,148	3,530	4,378	01-99	⇨	03-99	8.7
EL	469	0	0	0	:	:	:	10-98	⇨	12-98	-75.4
E	13,442	269	129	131	135	126	329	01-99	⇨	03-99	-4.0
F	62,153	:	:	:	:	:	:	07-98	⇨	09-98	0.5
IRL	:	:	:	:	:	:	:		⇨		:
I	52,411	971	672	1,077	:	:	:	10-98	⇨	12-98	-5.6
L	184	11	8	5	:	:	:	10-98	⇨	12-98	69.1
NL	:	:	:	:	:	:	:	10-97	⇨	12-97	-4.8
A	7,939	424	317	345	:	:	:	10-98	⇨	12-98	3.8
P	6,162	190	119	81	:	:	:	10-98	⇨	12-98	1.6
FIN	2,106	34	25	34	39	49	:	12-98	⇨	02-99	0.1
S	:	:	:	:	:	:	:	10-97	⇨	12-97	-16.5
UK	83,900	5,260	1,770	990	:	:	:	10-98	⇨	12-98	-3.4
NO	5,393	153	123	107	104	128	197	01-99	⇨	03-99	0.1

Source: eurostat

Table 4.10

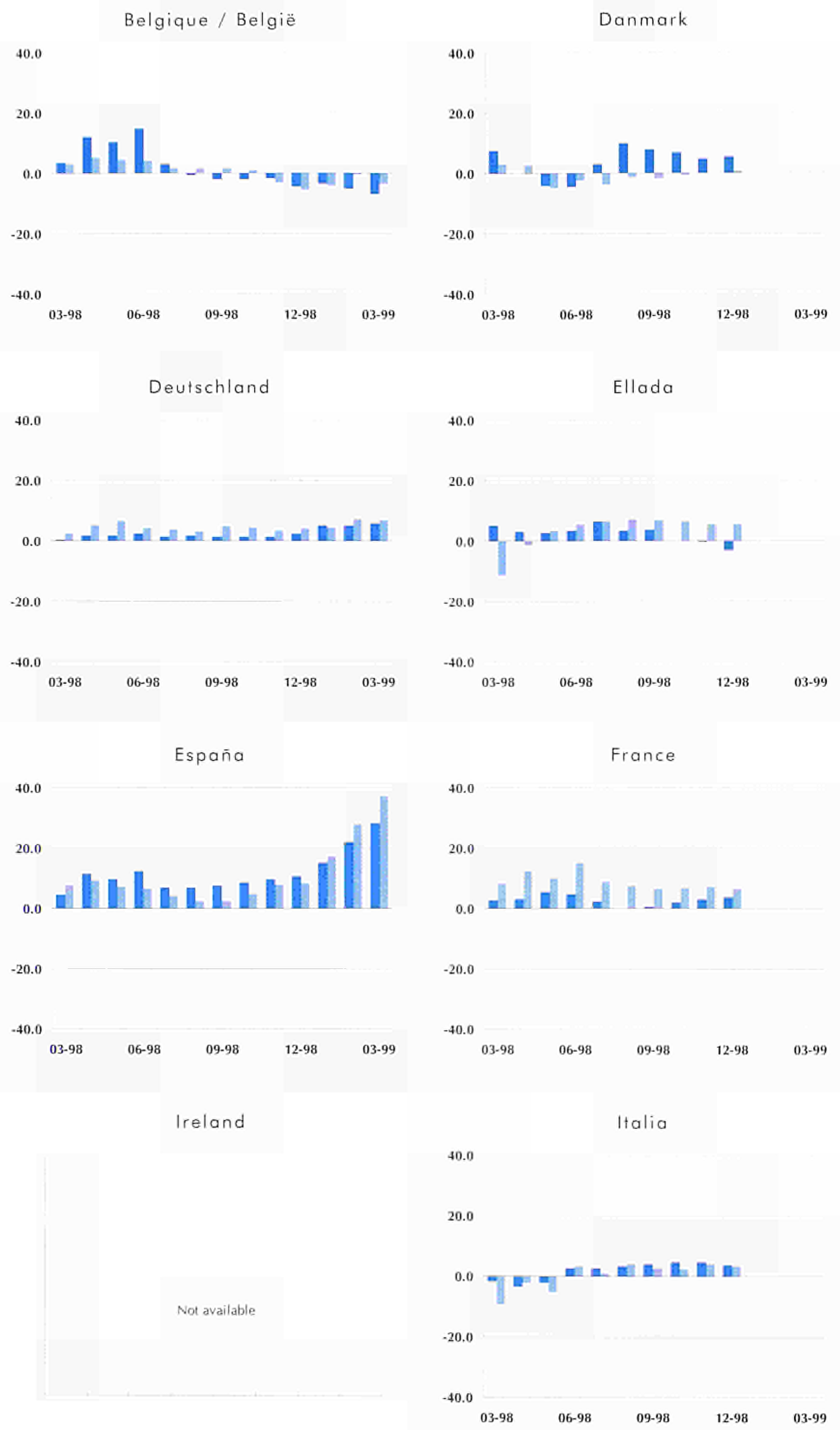
Guest flows in other collective accommodation establishments, non-residents in the country: units and latest growth rates (thousands)

	1998	10-98	11-98	12-98	01-99	02-99	03-99	Latest 3 months available			t / t-4 (%)
EU-15	:	:	:	:	:	:	:		⇨		:
EUR-11	:	:	:	:	:	:	:		⇨		:
B	5,264	470	190	232	200	270	138	01-99	⇨	03-99	-12.8
DK	5,825	230	32	46	:	:	:	10-98	⇨	12-98	-6.1
D	7,357	440	221	260	229	439	299	01-99	⇨	03-99	5.1
EL	717	5	1	1	:	:	:	10-98	⇨	12-98	5.3
E	9,193	321	216	279	326	307	339	01-99	⇨	03-99	25.5
F	33,013	:	:	:	:	:	:	07-98	⇨	09-98	4.6
IRL	:	:	:	:	:	:	:		⇨		:
I	34,166	1,024	200	279	:	:	:	10-98	⇨	12-98	2.3
L	1,206	:	:	:	:	:	:	06-98	⇨	08-98	-9.3
NL	:	:	:	:	:	:	:	10-97	⇨	12-97	12.9
A	9,697	293	78	673	:	:	:	10-98	⇨	12-98	21.5
P	2,032	67	39	28	:	:	:	10-98	⇨	12-98	10.7
FIN	467	5	6	11	12	8	:	12-98	⇨	02-99	9.2
S	:	:	:	:	:	:	:	10-97	⇨	12-97	-19.3
UK	38,186	1,720	2,170	3,150	2,380	1,850	:	12-98	⇨	02-99	1.1
NO	2,700	32	18	23	40	54	48	01-99	⇨	03-99	25.2

Source: eurostat

Figure 4.6

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



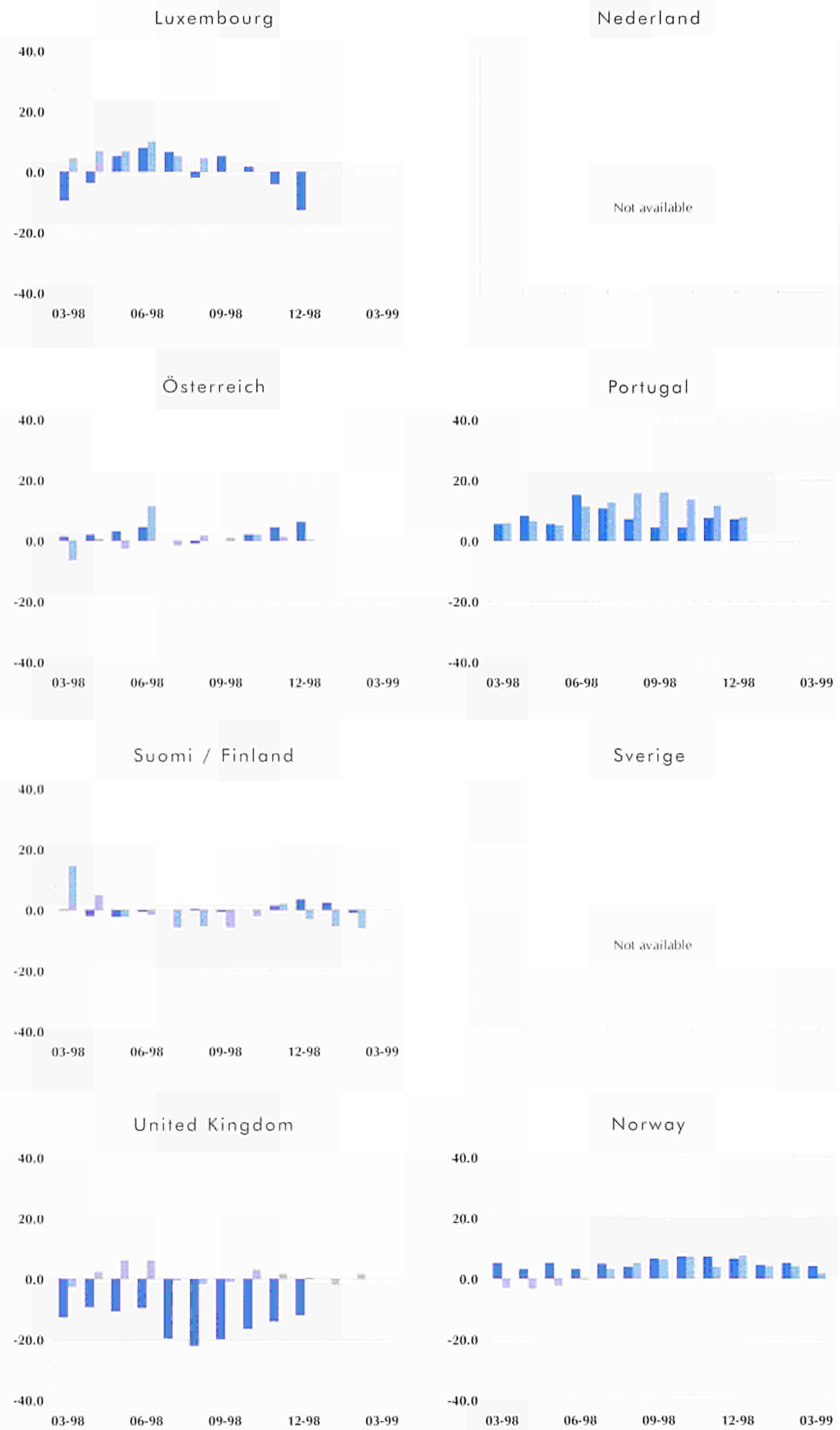
Residents

Non-residents

Source: eurostat

Figure 4.6

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

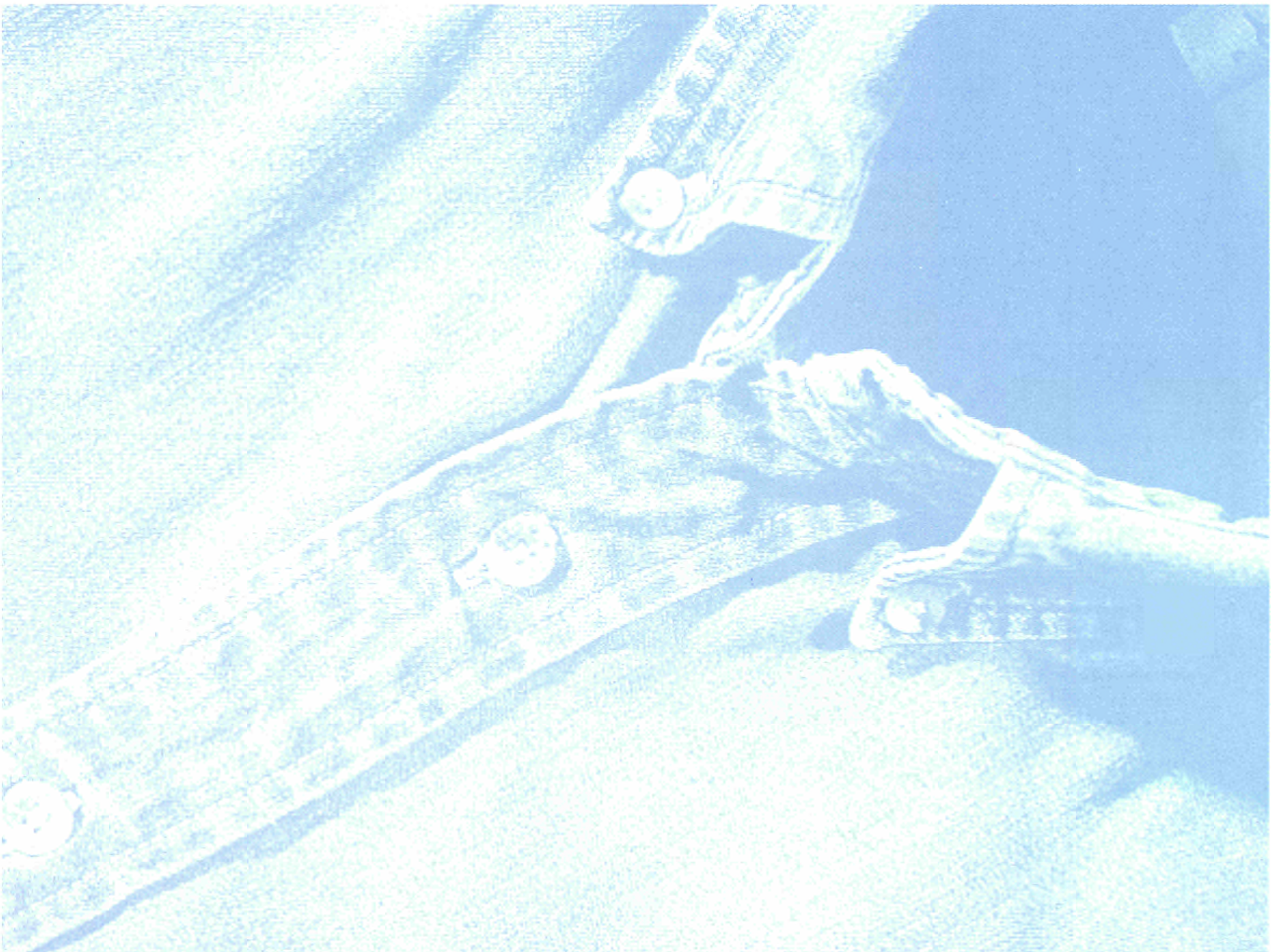


Residents

Non-residents

Source: eurostat

5. Wearing apparel, leather and leather goods



5. Wearing apparel, leather and leather goods

Description of the NACE Rev. 1 Groups in Divisions 18 and 19:

18.1: manufacture of leather clothes;
18.2: manufacture of other wearing apparel and accessories;
18.3: dressing and dyeing of fur; manufacture of articles or fur;
19.1: tanning and dressing of leather;
19.2: manufacture of luggage, handbags and the like, saddlery and harness;
19.3: manufacture of footwear.

Introduction

NACE Rev. 1 18 and 19 covers workwear, outerwear and underwear, articles of fur, articles of leather such as clothes, luggage or saddlery as well as footwear. These activities include also the dressing and dyeing of fur and tanning of leather. The manufacture of wearing apparel and leather products was responsible for about 2.5% of the European production value in total manufacturing. Since the late part of the eighties this share was reduced by nearly half a percentage point, reflecting the increasing tendency to produce such products in low-wage countries outside of the EU.

The manufacture of wearing apparel and leather products is a market that is becoming increasingly globalised, with a great deal of international competition for customers and production across borders. This trend has changed the requirement for business management in terms of languages, knowledge in marketing and logistics. At the same time, competition has increased the necessity to improve productivity and therefore investments in modern machinery, in a qualified labour staff and new distribution channels such as electronic commerce have also developed.

There was a high concentration of the manufacture of wearing apparel and leather products in the four Mediterranean Member States. If we look in more detail at the activity Greece, Spain, Italy and Portugal made 50% of European manufactures in the activity of wearing apparel (including dressing and dyeing of fur). Portugal and Italy recorded the highest levels of output for the manufacture of leather and leather products, together they were responsible for more than half of the EU's production value and with Spain they accounted for just under 70% of the total.

Further information

For industrial activities the 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). 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.

Enquiries regarding the purchase of data should be directed to:

Eurostat Data-Shop
4, rue Alphonse Weicker
L-2721 Luxembourg
tel: (352) 43 35 22 51
fax: (352) 43 35 22 221
e-mail: dslux@eurostat.datashop.lu

Trends in the production process

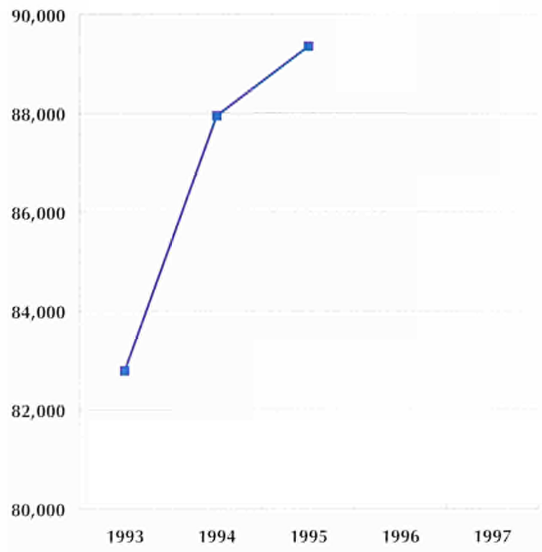
In 1998 the manufacture of wearing apparel and leather products reported a downward trend in production value in the EU (compared to the year before). This was mainly due to a decline in production in the four largest economies of Europe. Whilst Italian and German industrial activity displayed moderate losses (down by 1.4% and 0.7% respectively), in France and in the United Kingdom the decrease followed a faster pace (down by 8.6% and 9.8% respectively). Within the Mediterranean Member States the sector displayed also a decrease in production levels, with the exception of Spain where production of wearing apparel and leather products increased by 3.9%. Growth in Spain gained speed compared to 1997 (up by 2.3%) whilst in most Member States a downward tendency was observed between 1996 and 1997.

The manufacture of wearing apparel, leather and leather products was dominated by medium-sized enterprises. The strengths of the European manufacturers were high quality products, innovations in the production process, high skills in design and leadership in fashion trends. Increased competition on internationalised markets required constant efforts in research. German manufacturers reacted with a common research project[1].

This activity relies on a production process with a high level of labour intensity. The number of persons employed per one million ECU of production value varied across Europe, for example in the manufacture of wearing apparel from 6.1 person on average in Denmark to 49.5 persons in Portugal (figures for 1998). In Member States with traditionally lower wage levels there were relatively more persons employed than in countries like Germany, Belgium or as mentioned Denmark. Since 1993 manufacturers made efforts to reduce production costs of wearing apparel and leather products, however this occurred to a more significantly extent in Member States with higher labour costs. Whilst in Denmark the ratio fell by 4.9 persons on average, it remained nearly unchanged in Portugal.

High labour intensity combined with strong competition from low-wage countries required restructuring processes of production and distribution within the EU. A reduction in the number of persons employed and a shift of production facilities to Eastern European countries or overseas was not enough for many European enterprises to survive. A flexible range of products, as well as an active marketing campaign and the constant search for new

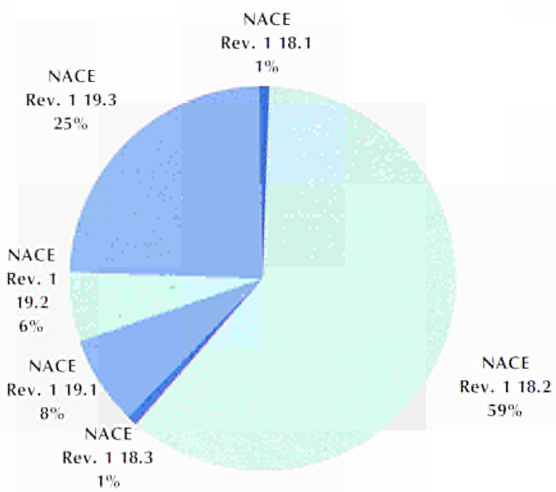
Figure 5.1



EU-15 production in constant prices (million ECU)

Source: eurostat

Figure 5.2



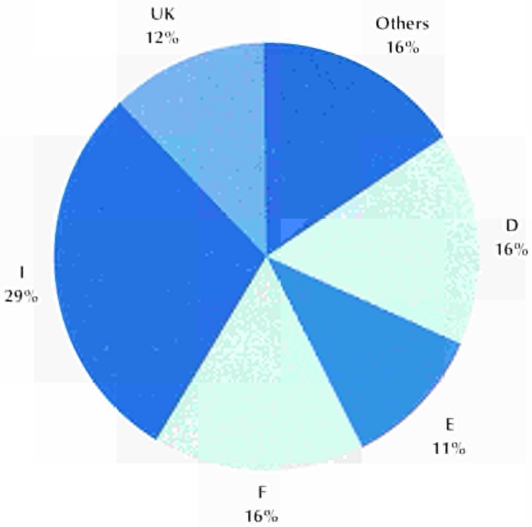
EU-15 share of production by industrial group, 1995

Source: eurostat

(1) Forschungsgemeinschaft Bekleidungsindustrie e.V.

Figure 5.3

Share of EU-15 value-added at factor cost, 1995



Source: eurostat

distribution channels, couple with an openness for accepting technological changes and sensitivity for changing consumer taste were a recipe for competitive firms in this industry. In addition, many producers placed more resources in the area of customer service (for example, after-sales service).

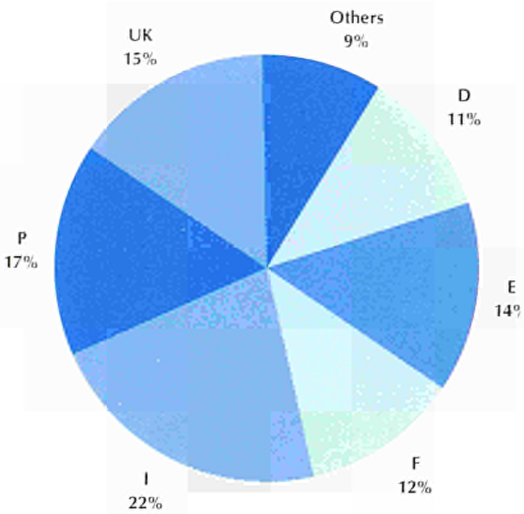
A breakdown of the manufacture of wearing apparel and leather products shows that the manufacture of other wearing apparel and accessories (NACE Rev. 1 18.2) accounted for around 60% of the aggregated production value (or around 95% of NACE Rev. 1 18). The activity produces workwear, other outerwear and underwear (excluding leather clothes). In 1998 there was no uniform trend in production value within the large Member States: an increase in Italy and Spain (up by 1.2% and 3.2% respectively) compared to a decrease in France, the United Kingdom and Germany (down by 15.5%, 7.1% and 0.3% respectively).

European tanners and dressers of leather produced around 7% of the production value of wearing apparel and leather products. In the Mediterranean Member States around three-quarters of the EU's tanning and dressing of leather took place. In 1998 Italy and Spain reported increases in production at current prices of 3.1% and 1.6% respectively, whilst the smaller economies of this region displayed a downward trend. Nevertheless, the Italian tanners and dressers had to face falling value added (down by 2.7% in 1998). Although European consumers were becoming more aware of quality (that was offered by European tanners), price was still one of the most important factors.

Italy, Spain and Portugal were also highly specialised in the manufacture of footwear where around 70% of the European production value was carried out. The sector contributed just under a quarter to the output of wearing apparel and leather products. The European manufacture of footwear reduced its production level during the nineties as countries in south-east Asia and Eastern Europe expanded their output rapidly. Between 1990 and 1998 production (at constant prices) decreased in all reporting EU countries (except for Spain with an annual average growth rate of 0.8%). In Italy production value decreased by 1.7% per annum, whilst in France the reduction was equal to 3.8% per annum. Within the Member States the footwear sector followed the trend of the whole activity of wearing apparel and leather products in 1998 with Italy and the United Kingdom reporting output down by 9.3% and 17.2% respectively. There was a moderate decline in Germany (down by 0.8%), whilst Spain registered an increase in activity - up by 3.7%. European suppliers of footwear increased their efforts to develop new products and to improve their customer service. This included

Figure 5.4

Share of EU-15 number of persons employed, 1995



Source: eurostat

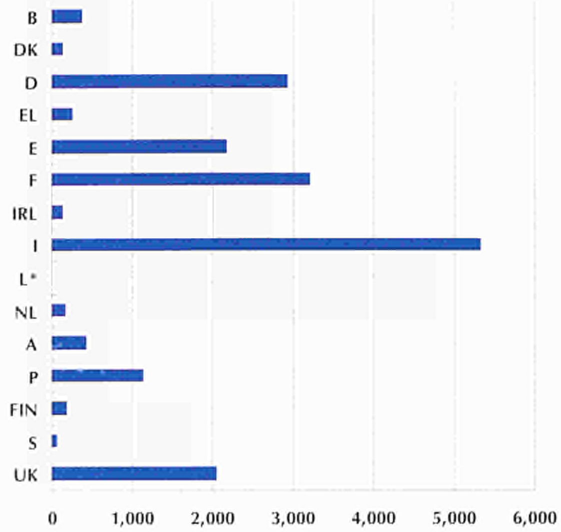
efforts to react more immediately to changes in consumer tastes in order to be a step ahead of foreign competitors.

Increasing production index in Spain whilst falling in Italy

In Europe the production index of wearing apparel, dressing and dyeing of fur was on a downward trend whilst the index of the manufacture of leather and leather products was slightly increasing. In Europe the former activity declined by 2.9% (for April 1999), continuing a series of rates below -2% (observed since the beginning of 1999). The latter activity displayed a rate of growth of 0.4% in the three months to April 1999 (when compared to the three-month period before), again a slowdown in growth.

In Italy, the country with the largest production, both activities were declining, the manufacture of wearing apparel at a faster pace than the manufacture of leather and leather products (down by 2.1% and 0.7% respectively, for April 1999). Contrary to the European trend there was an increase in both activities in Spain, the manufacture of wearing apparel grew moderately by 0.3% and the manufacture of leather and leather products by 1.1% (for April 1999).

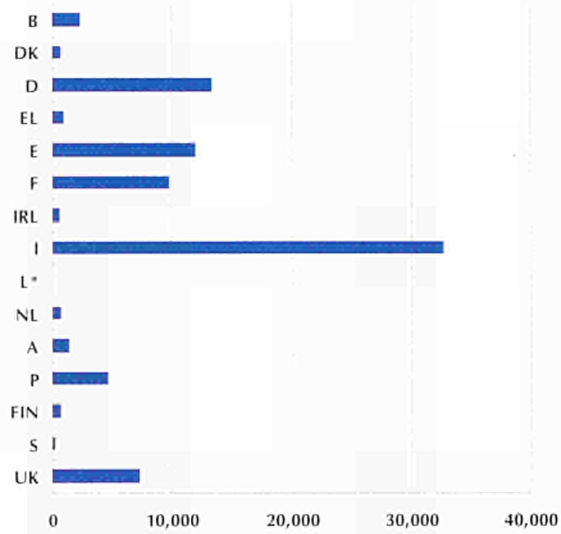
Figure 5.5



Labour costs, 1998 (million ECU)

Source: eurostat

Figure 5.6



Production in constant prices, 1998 (million ECU)

Source: eurostat

Producer price index

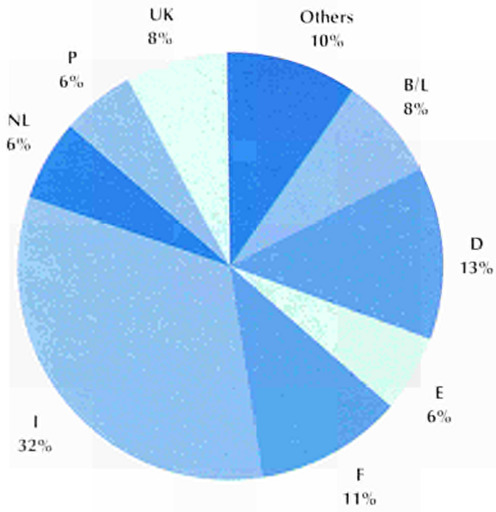
The EU producer price index continued to slow down, following its more rapid upward trend during the winter of 1998. In the manufacture of wearing apparel, dressing and dyeing of fur as well as in the manufacture of leather and leather products there was growth of 0.7% and 0.5% in May 1999 (compared to the same month of the year before).

In the manufacture of wearing apparel; dressing and dyeing of fur the index was increasing at a faster pace in Italy (up by 1.3%), whilst in Germany producer prices remained almost unchanged (up by 0.2%, both for May 1999). Within the smaller Member States the index displayed a more varied picture. In the Netherlands and in Denmark the increase of producer prices was particularly pronounced (up by 3.0% and 2.0% respectively, May 1999). In Finland, the activity reported a decrease in producer prices (down by 3.3% in April 1999), the fifth consecutive month.

In the manufacture of leather and leather products Italy recorded an increase in prices almost equal to the European average (up by 0.6%, May 1999), whilst Spanish producers saw a slowdown in prices from 1.9% in January 1999 to just 0.7% by May 1999. French and German producers saw their prices decline by 1.0% and 0.2% respectively (both May 1999).

Figure 5.7

Share of European exports to the rest of the world, 1998



Source: eurostat

In 1998 the manufacture of wearing apparel, dressing and dyeing of fur reported increasing employment in Italy and Greece (up by 2.6% and 12.3% respectively) and at a more moderate pace in France and Ireland (both up by 1.0%). The Spanish sector reduced its number of persons employed by 6.6%, despite growth in production.

Trends in employment

In the EU the manufacture of wearing apparel and leather products employed around 1.1 million persons in 1998. In the ten years since 1988 the sector has reduced the number of persons employed by around 25%. This indicated a constant restructuring of the production process, which was observed throughout the Member States, strongest in Germany and Finland where employment was reduced by 57.6% and 68.3%. Nevertheless, German manufacturers of footwear stated that they had problems to find new persons for training vacancies.

Foreign trade

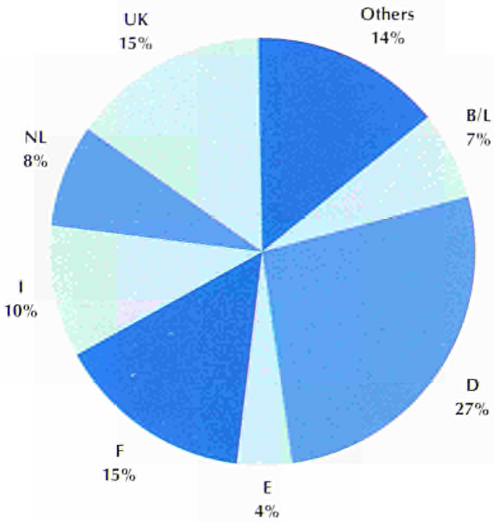
European manufacturers of wearing apparel and leather products delivered less of their production outside the Union than flows of imports in the opposite direction. The negative trade balance of the EU expanded between 1988 and 1998, with total exports declining.

If we look at the foreign trade of the euro-zone[2] (including intra-EU flows) the eleven countries also reported a trade deficit in the manufacture of wearing apparel, whilst there was a positive trade balance in the manufacture of leather and leather products. This was explained by high exports of Italy, Spain, Portugal and the Belgo-Luxembourg Economic Union. The Italian export ratio was equal to 73.4% of production. In 1998, more than two-thirds of German and French production was destined for non-domestic markets (with exports ratios of 70.2% and 74.4% respectively).

(2) Belgium, Germany, Spain, France, Ireland, Italy, Luxembourg, the Netherlands, Austria, Portugal and Finland make up the EUR-11 aggregate, otherwise known as the euro-zone.

Figure 5.8

Share of European imports from the rest of the world, 1998



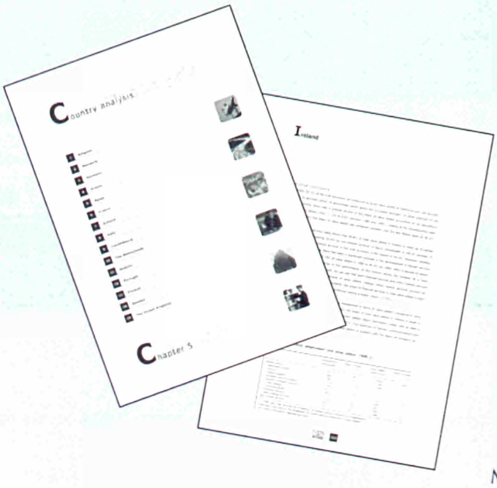
Source: eurostat

SERVICES IN EUROPE 98

There are more than four million enterprises in the area of distributive trades. German enterprises generate on average three times more turnover than their European counterparts. Financial services account for some 3% of total employment in the EU. In Luxembourg this rises to 8.8%, but in Portugal the sector employs only 1.8%.

Small family businesses predominate in transport services, especially in southern Member States. In Greece and Spain there are, on average, only 3.6 and 3.7 employees per enterprise.

Some six million people work in hotels and restaurants, 94% of which have between 0-9 employees. In Belgium, for each person employed in an hotel there are six employed in a restaurant or bar - well above the European average.



The publication says that services now account for 65% of the wealth created in the EU and have transformed the working environment. In the foreword, Eurostat Director-General Yves Franchet says: "One of the major success stories of the services economy is the considerable number of new jobs that have been created. Women have taken many of these jobs and many posts offer employment opportunities to those members of society who choose or need to work part-time". "Such a flexible system contrasts with the constraints of shift work that are still found in many industrial enterprises. It would appear that these trends will continue: with even leaner, more specialised workforces on the productive-side of the economy and more jobs and value-added in the services economy".

Mr Franchet said of the electronic publication, with its thematic, sectoral and country analyses of the EU service sector that it is "representative of an evolving dissemination policy within Eurostat, as it is one of the first examples of what I hope will be a succession of electronic information tools that combine a variety of different sources of data and information in a seamless manner".

"It is hoped that this comprehensive survey of the state of European services is of interest to a broad spectrum of users and that it marks the start of a more extensive coverage of services by official statistics".

The data come in a new publication "Services in Europe", also available on CD-ROM. It gives an overview of employment, value-added and household consumption, and an in-depth look at the industries that make up the European services economy. This is the first major review of the service sector from Eurostat.

Services in Europe, 200 pages or CD-ROM, available through Eurostat Data Shops and European Commission sales agents. The CD-ROM contains more data, a glossary, information on the data sources and other general information (not included in the paper publication).

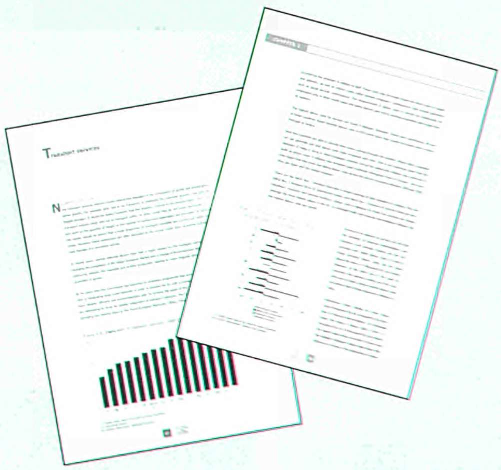


Table 5.1

Value-added at factor cost (million ECU)

	1994	t / t-1 (%)	1995	t / t-1 (%)	1996	t / t-1 (%)	1997	t / t-1 (%)	1998	t / t-1 (%)
EU-15	27,748	1.3	27,001	-2.7	:	:	:	:	:	:
EUR-11	:	:	:	:	:	:	:	:	:	:
B	:	:	620	:	587	-5.3	566	-3.6	597	5.4
DK	289	0.7	258	-10.5	235	-8.9	243	3.2	246	1.4
D	4,825	-4.9	4,388	-9.0	4,052	-7.7	3,949	-2.5	4,001	1.3
EL	349	-11.2	349	0.2	318	-9.0	321	0.9	321	0.1
E	2,866	-5.0	2,896	1.1	3,197	10.4	3,258	1.9	3,378	3.7
F	4,347	1.6	4,233	-2.6	4,040	-4.6	4,039	0.0	3,415	-15.5
IRL	199	11.0	190	-4.5	187	-1.5	187	-0.2	187	0.0
I	8,002	6.9	7,995	-0.1	8,832	10.5	8,813	-0.2	8,977	1.9
L	:	:	:	:	:	:	:	:	:	:
NL	256	-6.6	233	-9.0	201	-13.8	191	-4.8	209	9.4
A	490	-13.1	583	19.0	519	-10.9	481	-7.4	:	:
P	:	:	:	:	:	:	:	:	:	:
FIN	310	17.7	301	-3.1	290	-3.5	272	-6.3	260	-4.4
S	82	-0.5	:	:	97	:	100	3.6	94	-6.3
UK	3,770	:	3,269	-13.3	3,189	-2.4	3,535	10.9	3,264	-7.7
Japan	15,979	-8.0	15,406	-3.6	13,044	-15.3	12,635	-3.1	:	:
USA	31,294	0.4	28,414	-9.2	28,669	0.9	31,132	8.6	:	:

Source: eurostat

Table 5.2

Production in constant prices (million ECU)

	1994	t / t-1 (%)	1995	t / t-1 (%)	1996	t / t-1 (%)	1997	t / t-1 (%)	1998	t / t-1 (%)
EU-15	87,954	6.2	89,364	1.6	:	:	:	:	:	:
EUR-11	:	:	:	:	:	:	:	:	:	:
B	966	-10.8	2,380	146.4	2,430	2.1	2,072	-14.7	2,285	10.3
DK	803	5.3	820	2.1	690	-15.9	707	2.6	724	2.4
D	15,282	-2.2	14,847	-2.8	14,062	-5.3	13,423	-4.5	13,329	-0.7
EL	1,094	-7.1	1,119	2.3	1,065	-4.8	1,010	-5.2	931	-7.8
E	10,105	6.0	10,436	3.3	11,289	8.2	11,546	2.3	11,994	3.9
F	11,993	3.5	12,544	4.6	11,537	-8.0	11,212	-2.8	9,744	-13.1
IRL	540	:	542	0.2	522	-3.6	559	7.0	571	2.0
I	31,087	14.8	30,010	-3.5	32,668	8.9	33,116	1.4	32,650	-1.4
L	:	:	:	:	:	:	:	:	:	:
NL	868	-2.0	818	-5.8	692	-15.4	701	1.2	732	4.4
A	1,470	-7.3	1,594	8.4	1,548	-2.8	1,340	-13.5	1,442	7.6
P	5,360	4.4	5,257	-1.9	5,305	0.9	5,057	-4.7	4,622	-8.6
FIN	658	24.3	751	14.1	723	-3.8	676	-6.5	646	-4.3
S	241	17.4	:	:	278	:	295	6.2	274	-7.1
UK	8,541	:	8,077	-5.4	7,129	-11.7	8,091	13.5	7,300	-9.8
Japan	32,598	-9.2	31,290	-4.0	26,630	-14.9	25,703	-3.5	:	:
USA	60,302	0.2	55,164	-8.5	56,405	2.3	60,377	7.0	:	:

Source: eurostat

Wearing apparel, leather and leather goods: NACE Rev. 1 Divisions 18 and 19

Table 5.3

Number of persons employed (units)

	1994	t / t-1 (%)	1995	t / t-1 (%)	1996	t / t-1 (%)	1997	t / t-1 (%)	1998	t / t-1 (%)
EU-15	1,296,374	-3.5	1,261,660	-2.7	:	:	:	:	:	:
EUR-11	:	:	:	:	:	:	:	:	:	:
B	19,925	-0.3	20,958	5.2	20,108	-4.1	18,780	-6.6	17,223	-8.3
DK	6,839	-5.6	6,337	-7.3	5,268	-16.9	4,681	-11.1	4,606	-1.6
D	155,508	-10.3	138,306	-11.1	121,803	-11.9	112,290	-7.8	106,194	-5.4
EL	31,376	-12.9	29,466	-6.1	26,269	-10.8	24,682	-6.0	27,519	11.5
E	185,264	-2.9	182,098	-1.7	190,917	4.8	196,857	3.1	187,886	-4.6
F	158,592	-0.7	152,544	-3.8	145,237	-4.8	142,266	-2.0	142,078	-0.1
IRL	12,859	4.4	12,649	-1.6	11,328	-10.4	10,555	-6.8	10,731	1.7
I	284,696	-2.8	271,647	-4.6	272,166	0.2	271,682	-0.2	271,201	-0.2
L	:	:	:	:	:	:	:	:	:	:
NL	:	:	:	:	:	:	:	:	:	:
A	19,509	-12.8	20,449	4.8	20,061	-1.9	20,040	-0.1	19,865	-0.9
P	220,188	0.3	208,763	-5.2	207,510	-0.6	199,021	-4.1	196,142	-1.4
FIN	11,059	-6.7	11,784	6.6	10,547	-10.5	10,260	-2.7	9,758	-4.9
S	2,718	-5.2	:	:	2,727	:	2,944	8.0	2,814	-4.4
UK	193,442	:	194,786	0.7	146,189	-24.9	140,683	-3.8	132,453	-5.9
Japan	490,308	-11.7	460,327	-6.1	428,175	-7.0	418,909	-2.2	:	:
USA	900,554	-4.7	876,400	-2.7	780,700	-10.9	750,485	-3.9	:	:

Source: eurostat

Table 5.4

Labour costs (million ECU)

	1994	t / t-1 (%)	1995	t / t-1 (%)	1996	t / t-1 (%)	1997	t / t-1 (%)	1998	t / t-1 (%)
EU-15	20,220	-1.0	19,288	-4.6	:	:	:	:	:	:
EUR-11	:	:	:	:	:	:	:	:	:	:
B	:	:	443	:	407	-8.2	378	-7.2	374	-1.0
DK	177	-2.1	176	0.0	158	-10.6	138	-12.6	136	-1.7
D	3,741	-5.7	3,565	-4.7	3,223	-9.6	2,983	-7.5	2,924	-2.0
EL	306	-7.3	310	1.5	295	-4.9	296	0.4	266	-10.3
E	2,140	-4.0	2,140	0.0	2,342	9.4	2,340	-0.1	2,167	-7.4
F	3,560	0.2	3,502	-1.6	3,365	-3.9	3,227	-4.1	3,209	-0.6
IRL	162	:	160	-1.1	149	-7.1	149	0.4	142	-4.7
I	5,086	0.7	4,882	-4.0	5,317	8.9	5,390	1.4	5,333	-1.0
L	:	:	:	:	:	:	:	:	:	:
NL	205	-7.3	192	-6.5	158	-17.5	153	-3.3	171	11.8
A	407	-10.4	474	16.5	447	-5.7	415	-7.1	438	5.5
P	1,226	0.6	1,251	2.0	1,247	-0.3	1,179	-5.4	1,144	-3.0
FIN	199	9.0	229	15.0	213	-7.2	207	-2.6	192	-7.5
S	59	-3.6	:	:	75	:	78	3.5	74	-4.8
UK	2,525	:	2,315	-8.3	1,894	-18.2	2,135	12.8	2,054	-3.8
Japan	:	:	:	:	:	:	:	:	:	:
USA	:	:	:	:	:	:	:	:	:	:

Source: eurostat

Table 5.5

Extra-EU-15 exports (million ECU)

	1994	t / t-1 (%)	1995	t / t-1 (%)	1996	t / t-1 (%)	1997	t / t-1 (%)	1998	t / t-1 (%)
EU-15	:	:	19,883	:	22,632	13.8	23,921	5.7	23,295	-2.6
B/L	248	14.8	277	11.9	313	12.8	352	12.4	334	-4.9
DK	322	6.2	331	2.7	340	2.8	401	17.8	421	5.0
D	2,782	9.0	2,921	5.0	2,987	2.3	3,266	9.3	3,372	3.3
EL	:	:	226	:	323	43.1	443	37.3	418	-5.6
E	1,362	22.4	1,397	2.6	1,605	14.9	1,450	-9.7	1,368	-5.6
F	2,888	18.8	3,034	5.0	3,154	3.9	3,193	1.3	3,146	-1.5
IRL	57	-3.9	53	-7.5	104	98.8	84	-19.4	67	-19.9
I	7,663	27.9	8,510	11.1	10,366	21.8	10,758	3.8	10,365	-3.7
NL	332	9.4	370	11.2	376	1.8	417	10.7	406	-2.4
A	395	7.0	436	10.3	496	13.9	552	11.2	553	0.2
P	523	10.7	523	0.0	498	-4.8	460	-7.7	429	-6.6
FIN	163	37.9	166	2.0	194	16.7	215	10.7	193	-10.2
S	182	13.9	173	-4.8	193	11.6	207	7.0	200	-3.3
UK	1,363	10.9	1,465	7.5	1,682	14.8	2,125	26.4	2,021	-4.9

Source: eurostat

Table 5.6

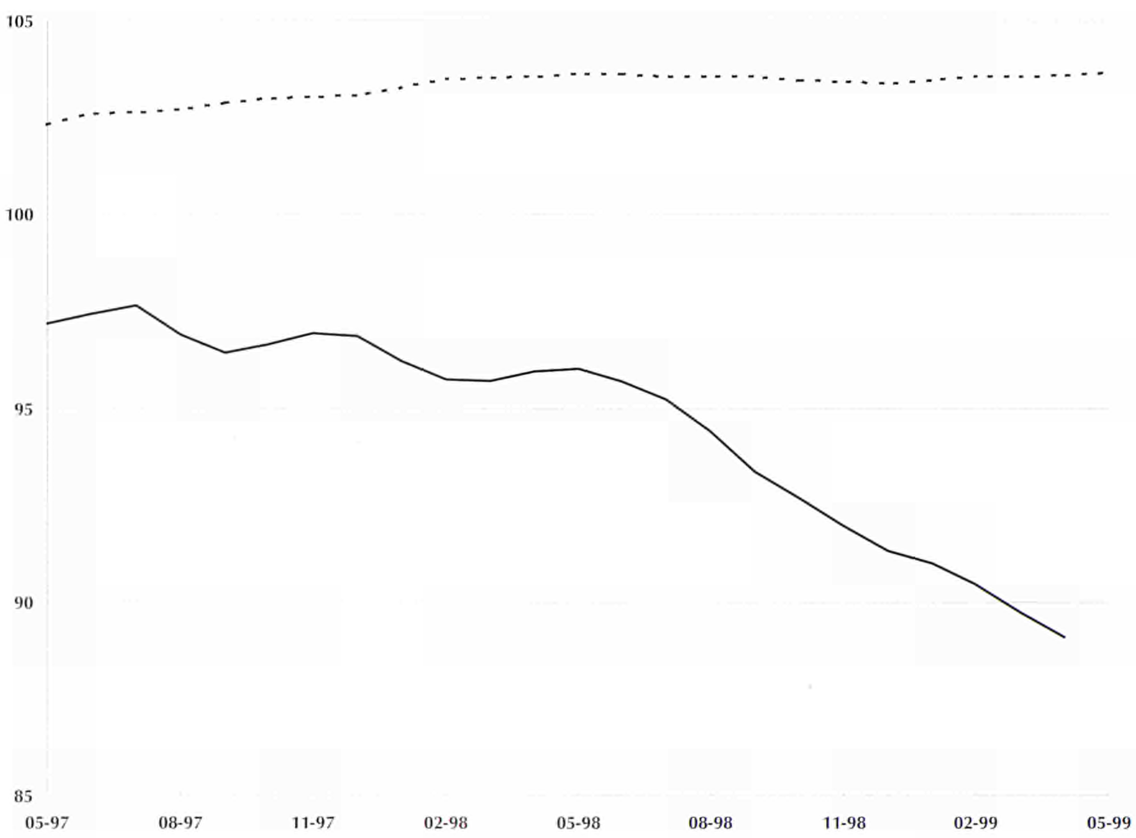
Extra EU-15 imports (million ECU)

	1994	t / t-1 (%)	1995	t / t-1 (%)	1996	t / t-1 (%)	1997	t / t-1 (%)	1998	t / t-1 (%)
EU-15	:	:	36,756	:	39,595	7.7	45,312	14.4	47,132	4.0
B/L	1,285	7.4	1,478	15.0	1,932	30.7	2,407	24.6	2,576	7.0
DK	806	12.4	878	9.0	939	6.9	1,153	22.8	1,224	6.1
D	13,789	1.3	13,504	-2.1	13,644	1.0	14,588	6.9	14,767	1.2
EL	190	-2.4	206	8.2	322	56.8	414	28.5	452	9.1
E	960	17.3	1,011	5.4	1,077	6.5	1,499	39.2	1,505	0.4
F	4,891	5.3	5,076	3.8	5,102	0.5	5,671	11.2	5,996	5.7
IRL	:	:	138	:	241	75.2	188	-21.9	210	11.5
I	4,202	26.8	4,623	10.0	5,103	10.4	6,053	18.6	6,387	5.5
NL	2,809	7.3	2,680	-4.6	2,975	11.0	3,487	17.2	3,797	8.9
A	1,116	11.9	754	-32.4	872	15.6	913	4.8	946	3.6
P	244	32.8	252	3.4	248	-1.7	279	12.3	270	-2.9
FIN	374	33.4	305	-18.4	357	17.0	404	13.1	409	1.3
S	1,051	15.4	989	-5.9	1,005	1.7	1,118	11.2	1,080	-3.4
UK	4,948	8.4	4,863	-1.7	5,777	18.8	7,137	23.6	7,511	5.2

Source: eurostat

Textiles, wearing apparel, leather and leather goods: NACE Rev. 1 Divisions 17, 18 and 19

Figure 5.9



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 5.7

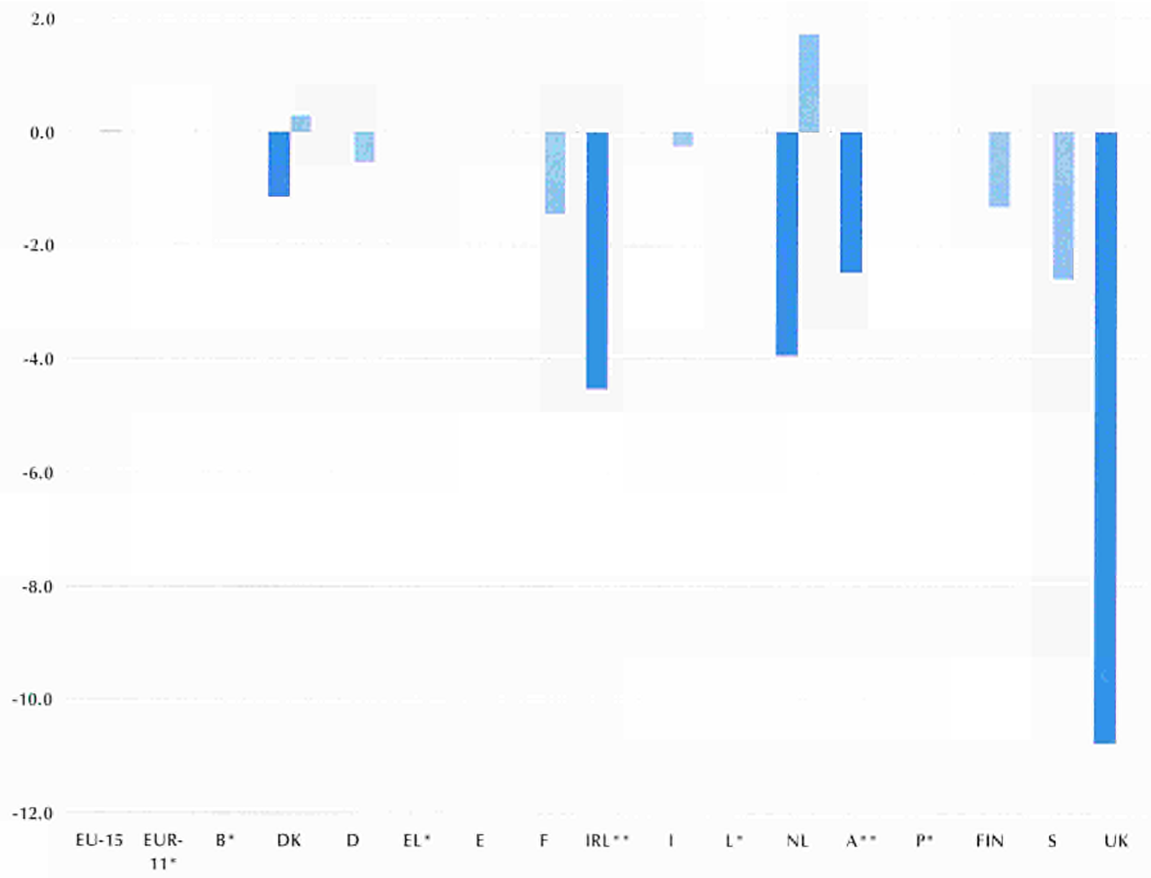
Production and producer price indices: growth rates (%)

	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	02-99	⇨	04-99	-1.8	-5.9	05-99	0.1	0.0
EUR-11		⇨		:	:		:	:
B	02-99	⇨	04-99	-2.2	-6.0	04-99	2.2	7.4
DK	03-99	⇨	05-99	-0.4	-1.2	05-99	-0.3	0.3
D	02-99	⇨	04-99	:	-4.5	05-99	-0.1	-0.6
EL	02-99	⇨	04-99	-1.6	-7.6	12-98	0.5	3.6
E	02-99	⇨	04-99	:	0.3	05-99	0.1	0.0
F	02-99	⇨	04-99	:	-6.8	05-99	0.0	-1.4
IRL	01-99	⇨	03-99	-0.8	-2.8	09-97	1.2	1.2
I	02-99	⇨	04-99	-1.6	-5.5	05-99	-0.2	-0.3
L	10-98	⇨	12-98	:	-25.2	12-98	-0.8	0.3
NL	03-99	⇨	05-99	-0.4	-3.9	05-99	0.7	1.7
A	01-99	⇨	03-99	-1.8	0.4		:	:
P	02-99	⇨	04-99	-1.9	-7.8	04-99	-0.1	-0.1
FIN	02-99	⇨	04-99	:	-7.6	05-99	-0.1	-1.3
S	02-99	⇨	04-99	-1.1	-8.2	05-99	0.2	-2.6
UK	03-99	⇨	05-99	-5.7	-10.8	09-98	0.0	0.5
NO		⇨		:	:		:	:
Japan		⇨		:	:		:	:
USA		⇨		:	:		:	:

Source: eurostat

Figure 5.10

Production and producer price indices: growth rate, three months compared to the same three months of the previous year, 03-99 to 05-99 (%)

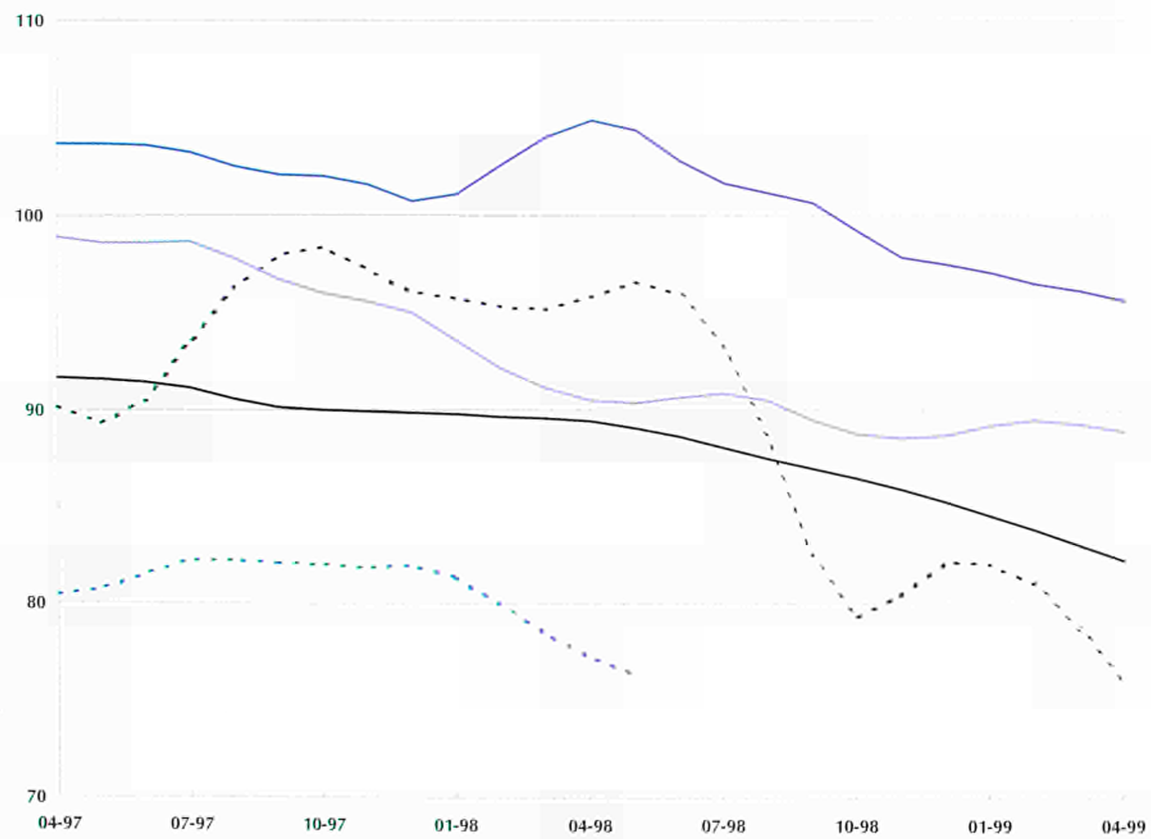


Production
Producer price index

Source: eurostat

Figure 5.11

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

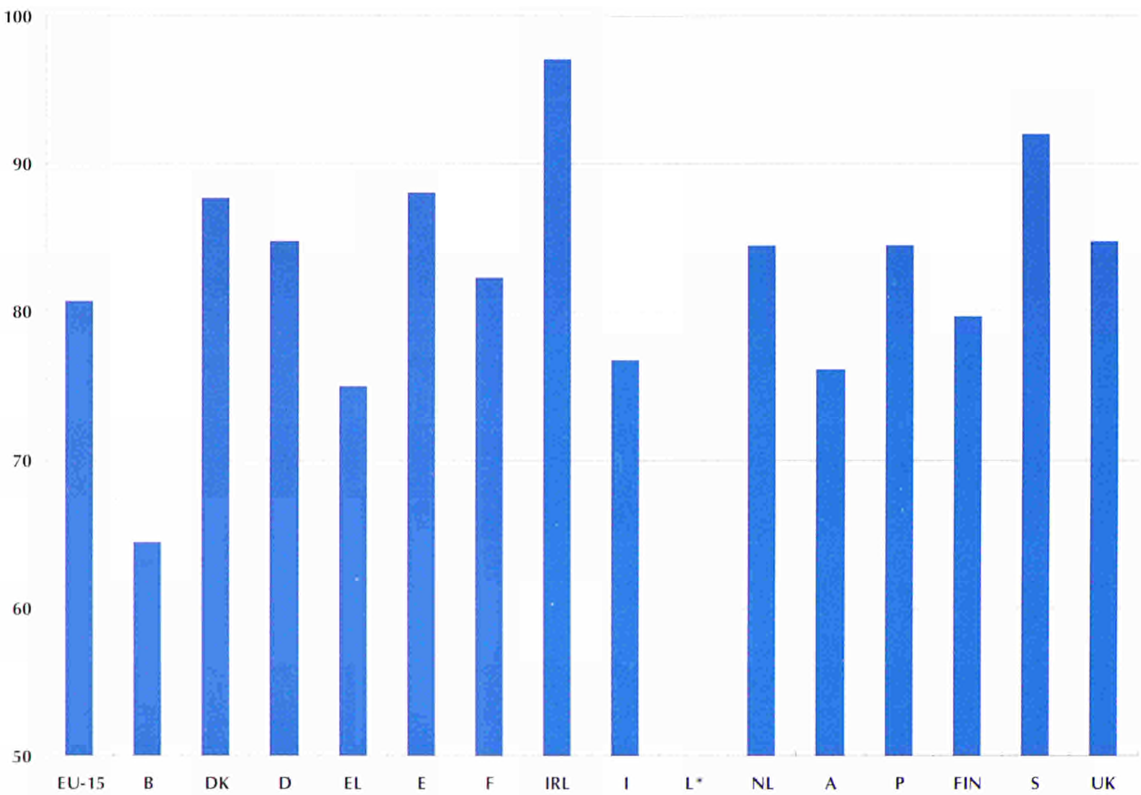


Other wearing apparel and accessories
Dressing and dyeing of fur, articles of fur
Tanning and dressing of leather
Luggage, handbags and the like, saddlery, harness
Footwear

Source: eurostat

Wearing apparel; dressing and dyeing of fur: NACE Rev. 1 Division 18

Figure 5.12



Capacity utilisation rates, 04-99 (%)

Source: DG II, Business Survey

Table 5.8

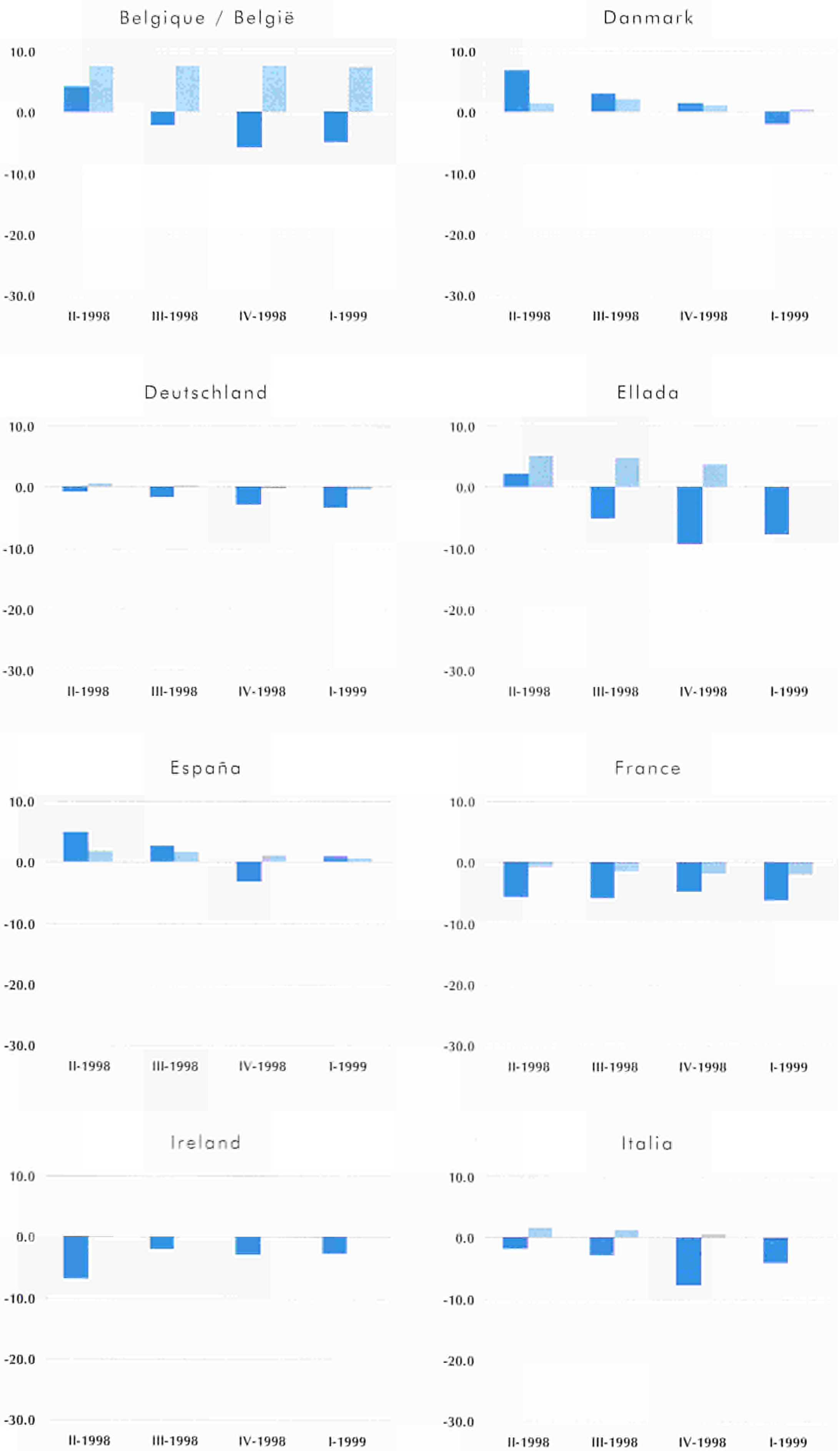
	Growth rate: latest month, t / t-12 (%)	07-98	10-98	01-99	04-99
EU-15	-1.9	80.7	79.9	81.2	80.7
B	-7.6	70.3	70.7	69.6	64.4
DK	-2.3	88.7	90.6	84.3	87.7
D	-4.6	91.3	88.8	89.9	84.7
EL	0.0	81.0	75.0	79.0	75.0
E	5.8	83.8	84.2	:	88.0
F	0.2	80.8	79.7	85.0	82.3
IRL	8.1	98.0	95.6	85.8	97.1
I	-3.4	77.3	76.5	78.1	76.7
L	:	:	:	:	:
NL	-1.2	86.3	85.2	85.1	84.5
A	-10.5	80.6	78.0	79.3	76.1
P	-2.6	84.2	87.8	83.8	84.5
FIN	-8.4	95.3	95.3	91.8	79.7
S	-5.2	97.0	95.0	94.0	92.0
UK	-0.2	78.7	77.5	79.1	84.7

Capacity utilisation rates (%)

Source: DG II, Business Survey

Figure 5.13

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

Textiles, wearing apparel, leather and leather goods: NACE Rev. 1 Divisions 17, 18 and 19

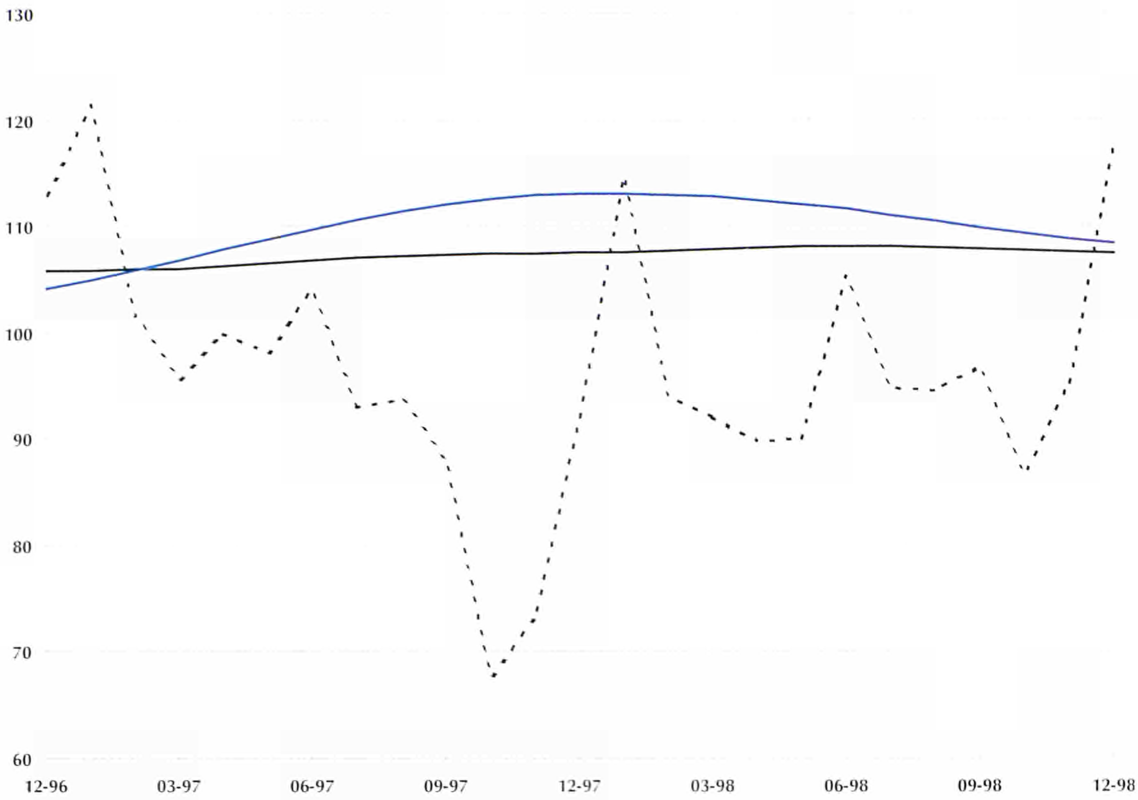
Figure 5.13

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

Source: eurostat

Figure 5.14

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



Source: eurostat

Table 5.9

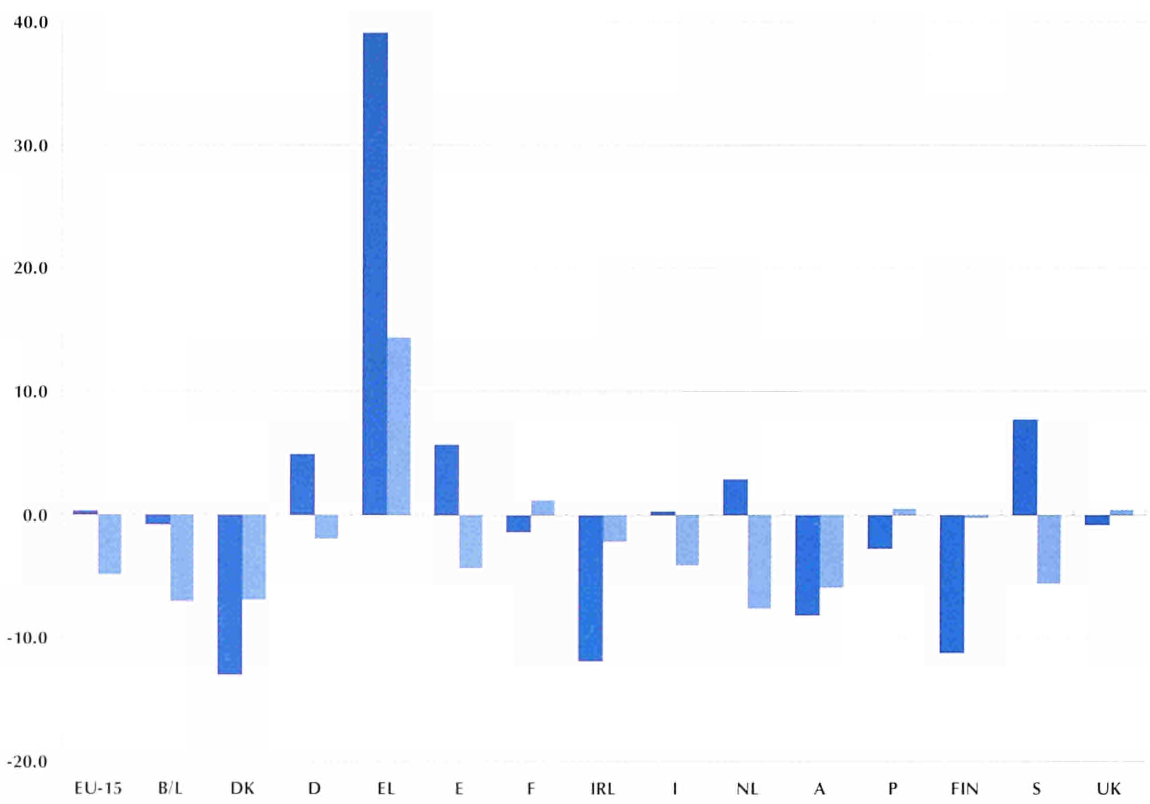
Foreign trade indices (value indices are in ECU terms): growth rate, three months compared to the previous three months (%)

	Latest 3 months available			Exports Value	Exports Volume	Imports Value	Imports Volume	Terms of trade
EU-15	10-98	⇨	12-98	-0.4	-3.1	-1.5	2.1	4.6
B / L	10-98	⇨	12-98	-0.6	-3.0	-0.8	1.2	3.2
DK	10-98	⇨	12-98	-4.4	0.4	-1.2	3.0	3.9
D	10-98	⇨	12-98	0.0	-0.6	0.1	1.7	14.3
EL	10-98	⇨	12-98	5.8	-8.6	4.5	-5.0	-8.8
E	10-98	⇨	12-98	-0.2	3.2	1.1	-0.2	-6.0
F	10-98	⇨	12-98	-0.8	0.5	1.1	1.3	4.8
IRL	10-98	⇨	12-98	-2.1	-2.7	1.7	-0.5	7.3
I	10-98	⇨	12-98	-0.4	-3.5	-1.2	1.6	1.3
NL	10-98	⇨	12-98	1.2	2.4	-0.3	-3.2	-1.1
A	10-98	⇨	12-98	-3.3	3.1	-3.1	-0.4	:
P	10-98	⇨	12-98	-1.2	-1.2	-1.0	3.7	-4.3
FIN	10-98	⇨	12-98	-4.0	-4.0	0.0	-1.2	:
S	10-98	⇨	12-98	2.5	-5.6	-1.7	0.0	:
UK	10-98	⇨	12-98	0.1	-6.8	0.7	-7.4	-10.7

Source: eurostat

Wearing apparel; dressing and dyeing of fur: NACE Rev. 1 Division 18

Figure 5.15



Foreign trade indices in ECU terms: growth rate, three months compared to the same three months of the previous year, 10-98 to 12-98 (%)

Source: eurostat

Table 5.10

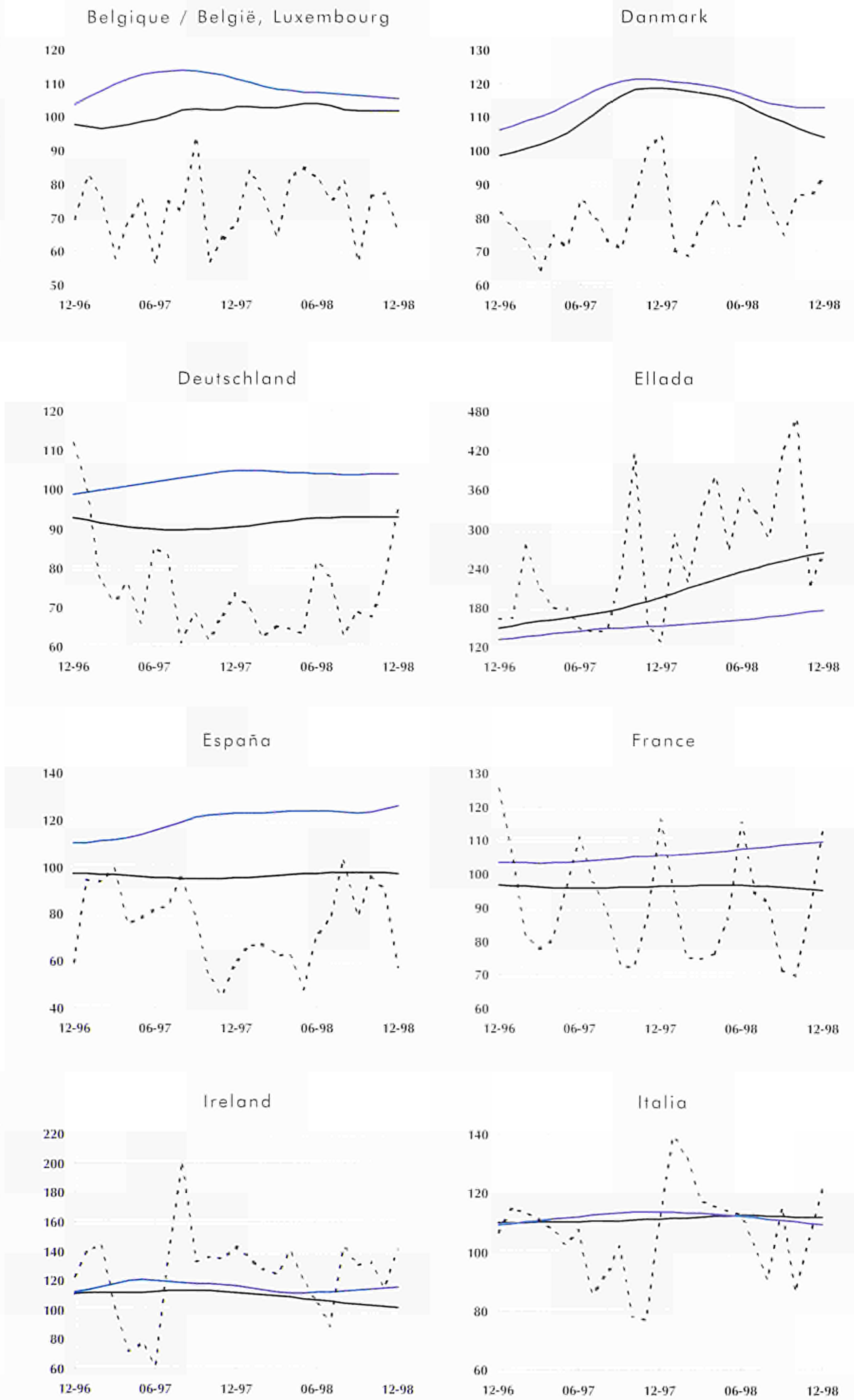
	Latest 3 months available			Exports Value	Exports Volume	Imports Value	Imports Volume	Terms of trade
EU-15	10-98	⇨	12-98	0.3	-11.4	-4.9	8.5	28.6
B / L	10-98	⇨	12-98	-0.8	9.9	-7.1	19.9	16.2
DK	10-98	⇨	12-98	-13.0	22.9	-6.9	22.1	-8.7
D	10-98	⇨	12-98	4.9	-3.8	-2.0	5.1	18.4
EL	10-98	⇨	12-98	39.1	-25.2	14.4	-18.6	36.1
E	10-98	⇨	12-98	5.7	-22.5	-4.3	6.0	53.9
F	10-98	⇨	12-98	-1.4	4.5	1.3	6.2	-1.3
IRL	10-98	⇨	12-98	-11.9	1.0	-2.2	3.9	-6.3
I	10-98	⇨	12-98	0.3	-6.4	-4.1	5.7	17.6
NL	10-98	⇨	12-98	2.8	-18.6	-7.6	5.7	43.3
A	10-98	⇨	12-98	-8.1	16.4	-5.9	12.3	:
P	10-98	⇨	12-98	-2.8	3.0	0.6	21.3	14.4
FIN	10-98	⇨	12-98	-11.2	-2.6	-0.3	2.4	:
S	10-98	⇨	12-98	7.7	-5.1	-5.5	4.8	:
UK	10-98	⇨	12-98	-0.8	-16.7	0.5	-1.9	15.2

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

Source: eurostat

Figure 5.16

Foreign trade indices in ECU terms (1995 = 100)



Export value index

Import value index

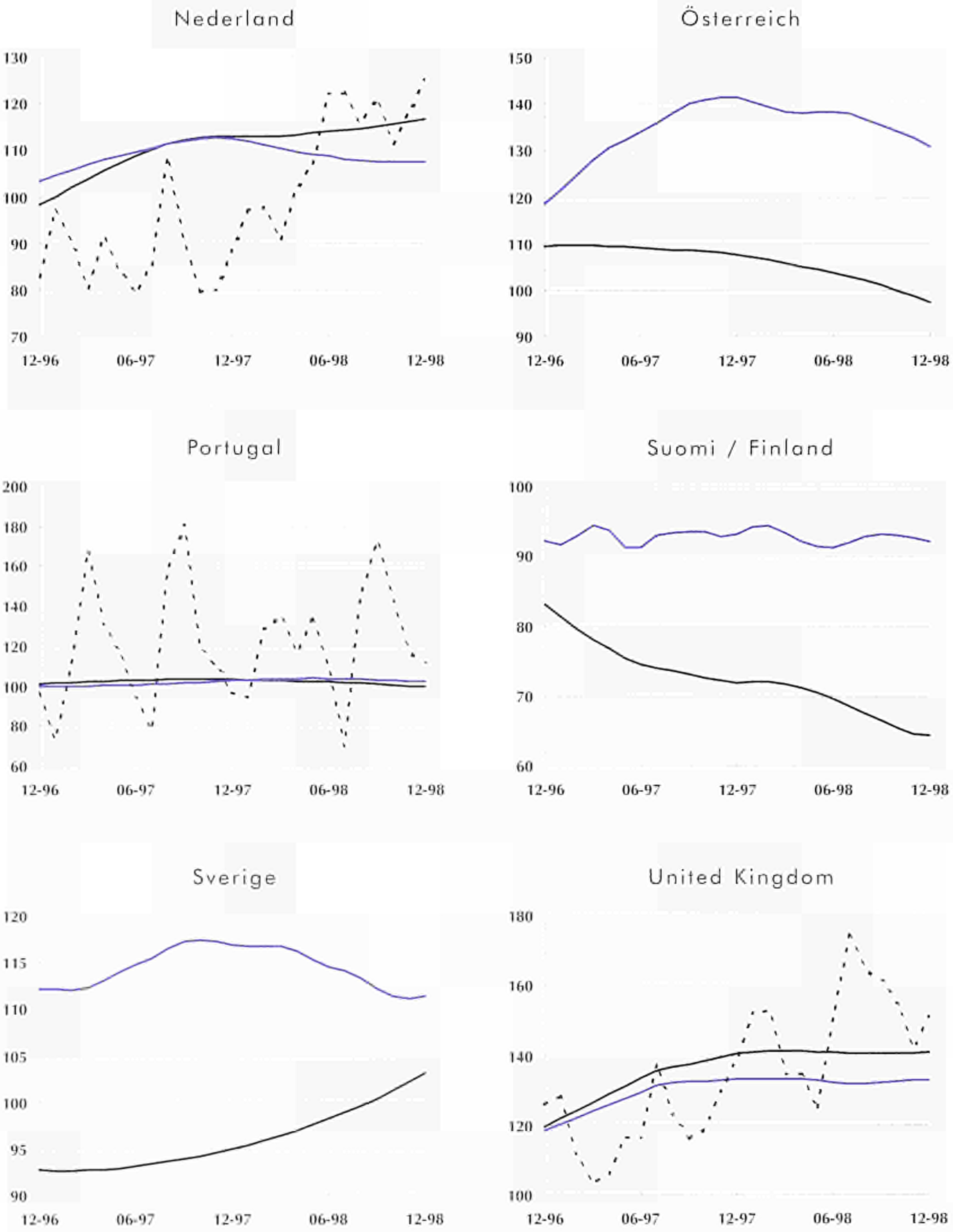
Terms of trade

Source: eurostat

Wearing apparel; dressing and dyeing of fur: NACE Rev. 1 Division 18

Figure 5.16

Foreign trade indices in ECU terms (1995 = 100)



Export value index

Import value index

Terms of trade

Source: eurostat

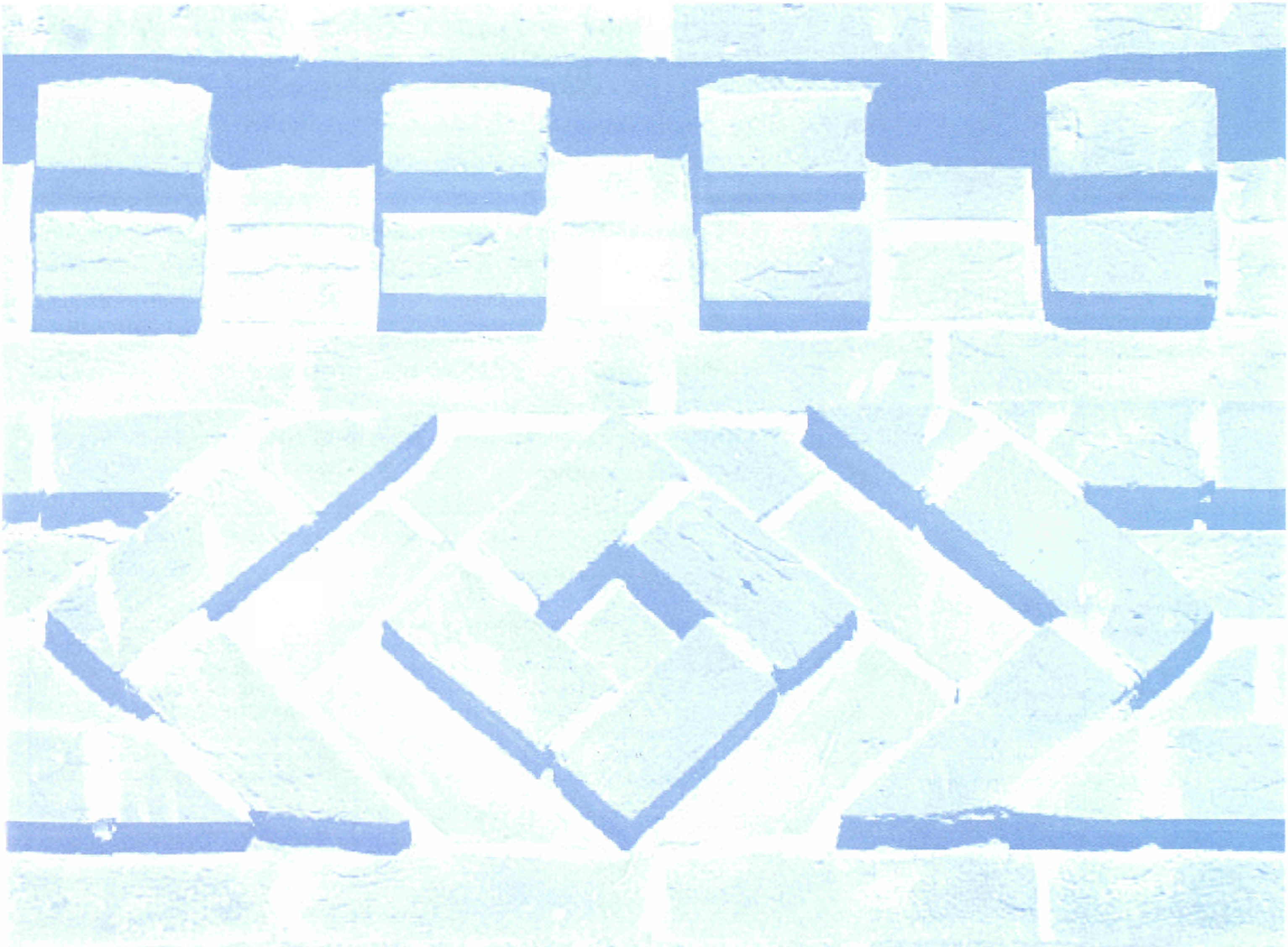
**Further information -
foreign trade indices**

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 Statistics" ISBN 92-828-2879-4.

Full methodological notes for this publication may be found on page 109.

6. Non-metallic mineral products



6. Non-metallic mineral products

Description of the NACE Rev. 1 Groups in Division 26:

26.1: manufacture of glass and glass products;
26.2: manufacture of non-refractory ceramic goods other than for construction purpose; manufature of refractory ceramic products;
26.3: manufacture of ceramic tiles and flags;
26.4: manufacture of bricks, tiles and construction products, in baked clay;
26.5: manufacture of cement, lime and plaster;
26.6: manufacture of articles of concrete, plaster and cement;
26.7: cutting, shaping and finishing of stone;
26.8: manufacture of other non-metallic mineral products n.e.c.

Introduction

The manufacture of other non-metallic mineral products covers products made of glass, ceramics, clay and stone, as well as the manufacture of cement and concrete. Its contribution to the production value of total manufacturing in the EU was equal to 3% during the course of the nineties. If we look at the shares by Member State there was a relatively large share of activity in the Iberian Peninsula: the Portuguese share of the activity in total manufacturing was more than double the European average, whilst in Spain the share was just under two times the European average. Greece and Austria also reported high specialisation in the manufacture of other non-metallic mineral products (both around 150% the European level).

The activity was partly dependent on the evolution of construction and civil engineering, as well as the award of public work contracts. This was above all true for the sale of cement, plaster, bricks and tiles. On the other hand, the industry delivered to a wide variety of other activities, ranging from electrical engineering (electrical insulators of ceramics) through food and beverage processing (containers of glass) to final consumers (household goods of glass and ceramics).

Trends in production

In 1998 the production value of the manufacture of other non-metallic mineral products increased by 2.4% in EU-15 (at current prices compared to the year before). This was a slight slowdown in the rate of growth (up by 3.2% in 1997). Between 1993 and 1998 production value in constant prices rose in the reporting Member States, such as in Spain by 2.1% per annum or in Finland by 9.3% per annum. Value added (at constant prices) grew at a slower pace during the same period, again for Spain and Finland: up by 2.0% and 4.0% per annum respectively. Italy, the second largest producing country in the EU, reported a very modest increase in production value (up by 0.3% per annum), whilst value added remained unchanged in the five years to 1998 (0.0% per annum).

Further information

For industrial activities the 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). 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.

Enquiries regarding the purchase of data should be directed to:

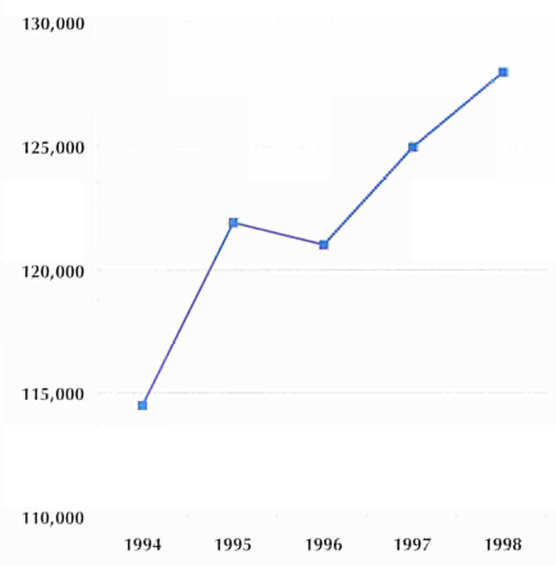
Eurostat Data-Shop
4, rue Alphonse Weicker
L-2721 Luxembourg
tel: (352) 43 35 22 51
fax: (352) 43 35 22 221
e-mail: dslux@eurostat.datashop.lu

In 1998 Italy continued to report growth below the EU average (a 1.7% increase in production value at current prices). The non-metallic minerals industry grew at a rapid pace in Belgium and in Spain, by 10.1% and 7.5% respectively, after moderate growth in 1997 (up by 1.7% and 1.4% respectively). In both countries there was a high level of output in the manufacture of cement, lime and plaster (NACE Rev. 1 26.5), as well as the manufacture of articles of concrete, plaster and cement (NACE Rev. 1 26.6).

EU production of NACE Rev. 1 26.5 and 26.6 accounted for 12.1% and 30.8% of the aggregated activity of other non-metallic mineral products. In 1998 both the manufacture of cement, lime and plaster and articles of concrete, plaster and cement grew at a faster pace than the aggregated activity in EU-15: up by 4.2% and 4.4% respectively. Nevertheless the manufacture of cement faced strong competition from Eastern European suppliers who offered low-quality cement at significantly lower price. Within the EU, electricity costs played an important role in determining competitiveness of cement producers, as electricity costs sometimes accounted for up to 40% of value added. The competitive environment has led towards concentration in many cement industries. Although the manufacture of cement displayed a low labour intensity, rising imports created pressure for further automation to reduce labour costs.

The manufacture of glass and glass products (NACE Rev. 1 26.1) or of flat glass, hollow glass, glass fibres and technical glass accounted for around one fifth of the production value of other non-metallic mineral products. In 1998, production values grew in most of the Member States, between 9.3% in Belgium and 0.2% in France, whilst in Ireland, Austria and Spain there were declines of 13.3%, 4.7% and 2.9% respectively. A large share of hollow glass was used as packaging material, facing increasing competition from lighter packaging materials made of plastic and tin (although environmental efforts tried to increase the use of returnable glass bottles). The European market for glass was characterised by over-capacity, leading to the search for niche markets and supply beyond glass products (for example, manufacturers moved into areas such as design and alternative forms of packaging). In the reporting Member States value added evolved at a slower pace than production value between 1993 and 1998 (both at constant prices). In France production value increased by 4.3% per annum whilst value added only by 3.4% per annum. The exception was Italy where value added went up nearly twice as fast as production value (by 2.5% and 1.4% respectively).

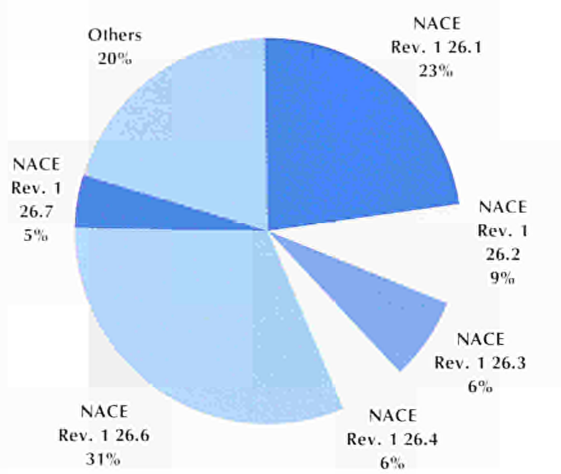
Figure 6.1



EU-15 production in constant prices (million ECU)

Source: eurostat

Figure 6.2

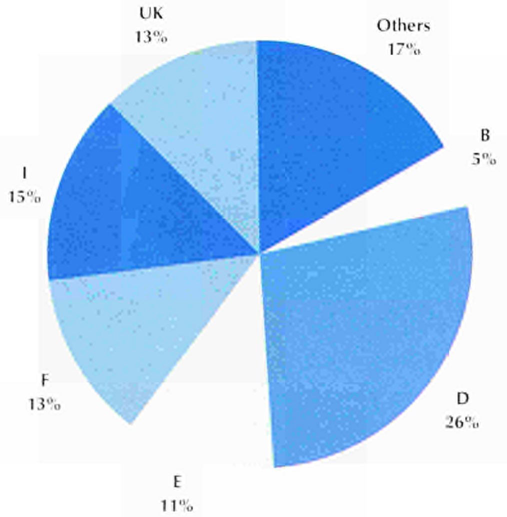


EU-15 share of production by industrial group, 1995

Source: eurostat

Figure 6.3

Share of EU-15 value-added at factor cost, 1998



Source: eurostat

The manufacture of ceramic goods (NACE Rev. 1 26.2 and 26.3) accounted for around 15% of total production value for non-metallic minerals. Besides ceramic goods for construction purposes (tiles and flags, covered in NACE Rev. 1 26.3) the product mix included ceramic household and ornamental articles, ceramic sanitary fixtures, electrical insulators and refractory ceramic products. Italy and Spain recorded a large manufacture of ceramic tiles and flags (NACE Rev. 1 26.3), which in the Iberian country grew by 7.6% in 1998 whilst slightly decreasing in Italy (by 0.8%). In Spain there was a high level of output for the manufacture of ceramic goods other than for construction purposes (NACE Rev. 1 26.2), however production value remained nearly unchanged in 1998 (down by 0.2%). In the United Kingdom, the second largest manufacturer in the EU, production increased by 3.7% and in Austria by 15.1% (the industry contributed 2.5 times more to Austrian total manufacturing than the European average).

United Kingdom production index down by 1.1%

The EU-15 production index for other non-metallic mineral products was on an upward trend, displaying growth of 1.1% in the three months to April 1999 (compared to the three-month period before). The upward trend was observed since February 1999 after falling for nine consecutive months. The EUR-11[1] aggregate reported even higher growth of 1.4% (again for April 1999).

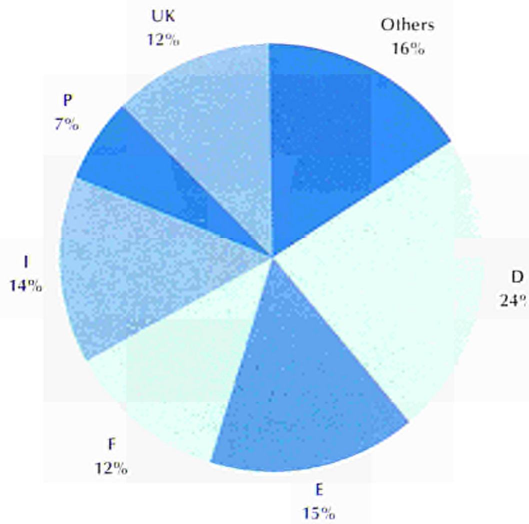
If we look at the individual Member States there was no uniform evolution. Activity declined in the United Kingdom (by 1.1%), as in France and Germany, where the production index decreased by 1.0% and 1.2% respectively (for April 1999). In Italy, production of other non-metallic mineral products was on an upward trend since October 1998, at constantly accelerating rates of growth. In Spain the activity reported a growing index since the spring of 1997 (only once interrupted in December 1998 with a very modest decline of 0.1%).

Rising producer price index in Europe

The EU producer price index increased by 0.9% in May 1999 (compared to the same month of the year before). In the euro-zone the increase was somewhat lower (up by 0.7% again in May 1999). In both European aggregates the rise in producer prices was a continuation of rates observed since the summer of 1998, even though there was a slight slowdown compared to the rates of growth from January 1999.

Figure 6.4

Share of EU-15 number of persons employed, 1998



Source: eurostat

(1) Belgium, Germany, Spain, France, Ireland, Italy, Luxembourg, the Netherlands, Austria, Portugal and Finland make up the EUR-11 aggregate, otherwise known as the euro-zone.

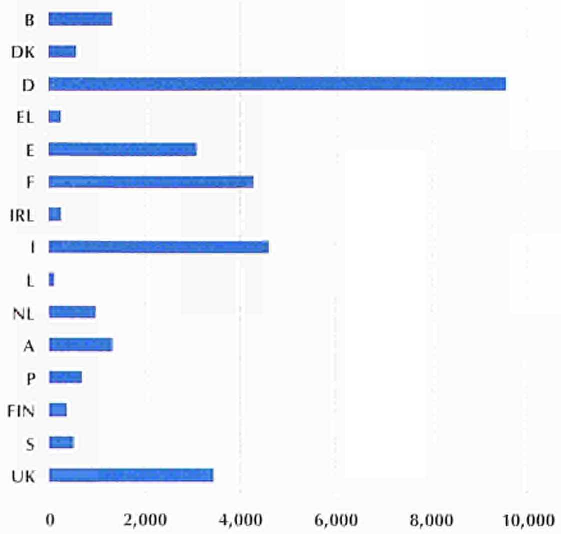
Within the larger Member States producer prices were rising, for example in Italy by 1.3% (for May 1999; there was no fresh data available for the United Kingdom). In Spain and in Italy the upward trend was observed from 1996 onwards, in France there was a period of falling prices before October 1997. Contrary to general tendency of rising prices, Germany reported falling producer prices over a period of several years (latest down by 0.5% in May 1999).

Trends in employment

In 1998 there were 1.1 million persons employed in the manufacture of other non-metallic mineral products in the EU. On average the enterprises engaged 8.3 persons in order to produce one million ECU of production value. Ten years before this figure was 12.9 persons. The decline was observed throughout the activity where the manufacture of cement, lime and plaster displayed a very low labour intensity, particularly in Finland, Belgium and Portugal (2.9, 3.0 and 3.1 persons employed per one million ECU of production value).

A decrease in employment was recorded in Germany, the United Kingdom and Belgium, whilst France, Italy and Denmark reported an increase in the number of persons employed (for 1998). There was a high growth rate for the Italian manufacture of cement, lime and plaster as well as the manufacture of ceramic goods (up by 13.9% and 13.1% respectively).

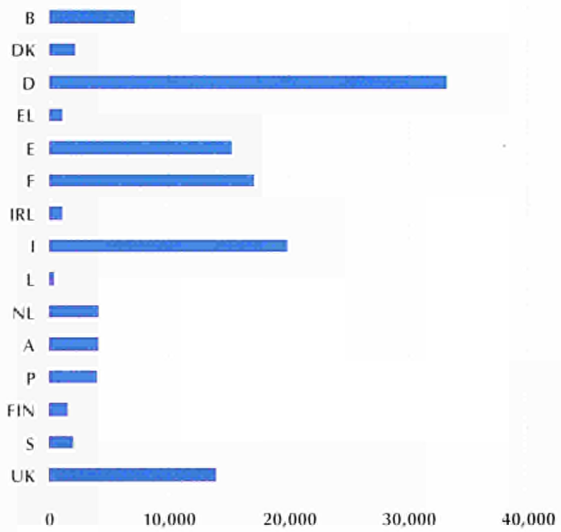
Figure 6.5



Labour costs, 1998 (million ECU)

Source: eurostat

Figure 6.6



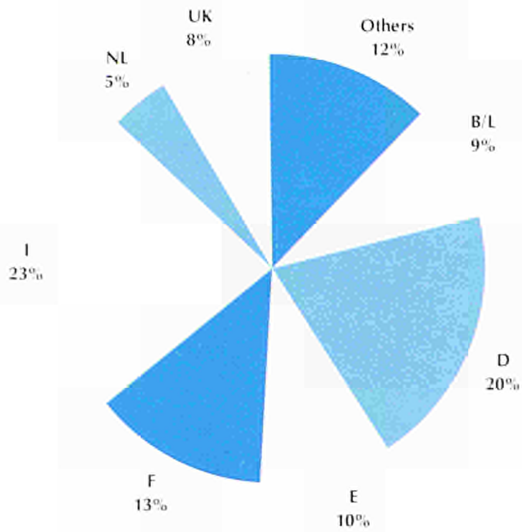
Production in constant prices, 1998 (million ECU)

Source: eurostat

The efforts to reduce labour intensity led to improved labour productivity figures for the manufacture of other non-metallic mineral products in the EU (as measured by value added per person employed). This ratio rose between 1993 and 1998 by some 8.7 thousand ECU to 48.3 thousand ECU per head. During the same period labour productivity in the manufacture of articles of concrete, plaster and cement increased by 10.2 thousand ECU to 51.0 thousand ECU per head by 1998. The increase was twice as high (in absolute terms) in the United Kingdom, Austria and Finland where value added per person employed reached 56.4, 74.1 and 48.5 thousand ECU per head.

Figure 6.7

Share of European exports to the rest of the world, 1998



Source: eurostat

Foreign trade

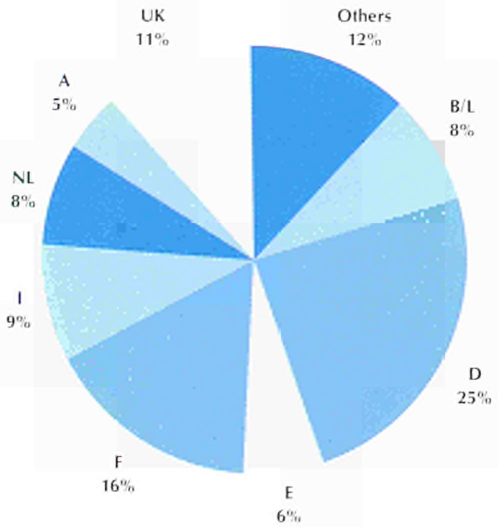
EU foreign trade of other non-metallic mineral products was low relative to the size of the European market, due largely to the fragility or weight of the products concerned. In 1998 deliveries to foreign countries accounted for 11.2% of the production value, whilst imports accounted for 5.4% of domestic apparent consumption. The excess of exports over imports was some 7.8 billion ECU, an increase of 53.9% during the ten years to 1998. Foreign trade figures for the EU cover total trade flows between the EU and non-Member States.

Figures for the EUR-11 aggregate including trade flows between the individual Member States reported that 28.1% of the production of non-metallic mineral products were exported and 20.8% of domestic apparent consumption was imported in 1998. If we look at the breakdown of the activity there was a negative trade balance only in the manufacture of cement, lime and plaster.

Within the Member States, Italy and the Netherlands recorded a higher export ratio of 40.7% and 38.0% respectively in 1998. Whilst the Italian share of non-domestic purchases in apparent consumption was lower than in EUR-11 (16.3%), the Dutch import penetration ratio reached 43.2%. The high imports in the Netherlands led to an excess of imports over exports of 376.7 million ECU, which was in absolute terms the highest in Europe.

Figure 6.8

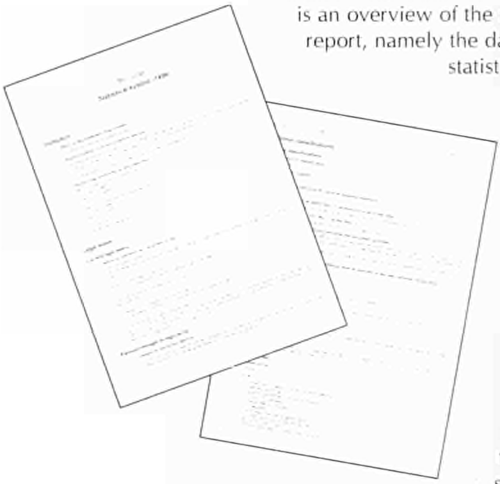
Share of European imports from the rest of the world, 1998



Source: eurostat

MERCURE SOURCES

This publication aims to document current practice in each of the members of the European Union (EU) and of the European Free Trade Area (EFTA) in the field of structural business statistics in the service sectors. Each country report is structured in the same way. The first part of the report explains the statistical system and the second part provides details on each national data source. There is one report on the statistical system per country and 46 different sources in total for the 17 countries currently available.



Information is provided on the following areas for the statistical system: the institution responsible, the legal framework, classifications, units, the business register and a summary of data sources. This last item is an overview of the data sources used and it serves as an introduction for the second part of each national report, namely the data sources. These sources are classified as surveys or administrative sources. As with the statistical system, the part relating to sources also has a standard structure. Some of the elements are only relevant for statistical surveys and are not relevant for sources based directly on administrative returns. The information provided for each source is: administrative and legal information, summary of the types of questionnaires used, population coverage, lists of information collected on each unit, primary data collection method including information on sample sizes and response rates, methods for the production of results, information on national quality reports and dissemination.

The contents of the CD-ROM can be viewed using most recent web browsers that support frames and JavaScript (e.g. Netscape 3 or later, Internet Explorer 4 or later). Through the browser the user can access a tailor-made interface showing the detailed methodological information. The information can be selected either by reading through the publication screen by screen or by navigating using a hierarchical tree structure made up of the full list of methodological information. The interface also provides the possibility to view the information for two different countries or two different sources from the same country on screen at the same time, which makes comparisons of the information easier to do.

This product is available in two forms, an electronic version on CD-ROM and a paper publication.

The paper publication runs to slightly more than 400 pages structured country by country and then source by source. A full list of the methodological items presented for each statistical system and each source is annexed to the publication.

Table 6.1

Value-added at factor cost (million ECU)

	1994	t / t-1 (%)	1995	t / t-1 (%)	1996	t / t-1 (%)	1997	t / t-1 (%)	1998	t / t-1 (%)
EU-15	47,314	7.9	49,488	4.6	48,718	-1.6	50,451	3.6	51,608	2.3
EUR-11	:	:	:	:	:	:	:	:	:	:
B	:	:	2,326	:	2,163	-7.0	2,277	5.3	2,456	7.8
DK	766	9.8	830	8.4	878	5.7	907	3.4	939	3.5
D	14,674	7.5	15,482	5.5	14,414	-6.9	14,071	-2.4	14,109	0.3
EL	:	:	:	:	:	:	:	:	:	:
E	5,130	8.8	5,508	7.4	5,440	-1.2	5,507	1.2	5,850	6.2
F	6,648	7.8	6,861	3.2	6,534	-4.8	6,523	-0.2	6,537	0.2
IRL	389	14.6	403	3.5	449	11.6	548	21.9	536	-2.2
I	6,807	0.0	6,668	-2.0	6,981	4.7	7,511	7.6	7,579	0.9
L	192	14.3	208	8.3	213	2.4	213	0.4	225	5.3
NL	1,689	12.2	1,781	5.5	1,739	-2.3	1,745	0.3	1,714	-1.8
A	2,000	10.7	1,954	-2.3	1,853	-5.2	1,894	2.2	1,928	1.8
P	:	:	:	:	:	:	:	:	:	:
FIN	533	18.7	542	1.6	577	6.5	612	6.1	608	-0.7
S	644	-4.8	714	10.8	751	5.2	718	-4.5	734	2.3
UK	5,236	:	5,188	-0.9	5,207	0.4	6,407	23.0	6,479	1.1
Japan	43,111	11.1	41,217	-4.4	37,047	-10.1	34,895	-5.8	:	:
USA	36,087	8.3	35,061	-2.8	39,061	11.4	44,241	13.3	:	:

Source: eurostat

Table 6.2

Production in constant prices (million ECU)

	1994	t / t-1 (%)	1995	t / t-1 (%)	1996	t / t-1 (%)	1997	t / t-1 (%)	1998	t / t-1 (%)
EU-15	114,526	5.7	121,894	6.4	121,012	-0.7	124,920	3.2	127,956	2.4
EUR-11	:	:	:	:	:	:	:	:	:	:
B	4,181	9.1	6,514	55.8	6,418	-1.5	6,526	1.7	7,185	10.1
DK	1,612	10.6	1,970	22.3	2,014	2.2	2,132	5.9	2,224	4.3
D	34,450	5.0	36,855	7.0	34,308	-6.9	33,152	-3.4	33,250	0.3
EL	1,009	-3.9	1,021	1.2	1,105	8.2	1,106	0.0	1,168	5.6
E	12,675	3.2	13,686	8.0	13,985	2.2	14,186	1.4	15,256	7.5
F	16,260	7.2	16,996	4.5	17,138	0.8	16,789	-2.0	17,146	2.1
IRL	789	:	862	9.3	974	13.1	1,261	29.4	1,161	-7.9
I	17,571	-0.2	17,313	-1.5	18,466	6.7	19,616	6.2	19,949	1.7
L	411	11.5	428	4.1	494	15.4	505	2.2	487	-3.5
NL	3,831	9.6	4,028	5.1	4,027	0.0	4,156	3.2	4,150	-0.1
A	4,698	7.5	4,150	-11.7	3,935	-5.2	4,021	2.2	4,151	3.2
P	3,012	6.6	3,337	10.8	3,521	5.5	3,911	11.1	4,049	3.5
FIN	1,134	18.5	1,327	17.1	1,416	6.7	1,586	12.0	1,664	4.9
S	1,494	-1.7	1,848	23.7	1,947	5.4	2,011	3.3	2,101	4.4
UK	11,692	:	11,559	-1.1	11,263	-2.6	13,963	24.0	14,015	0.4
Japan	90,774	11.9	85,120	-6.2	76,528	-10.1	72,089	-5.8	:	:
USA	67,253	6.2	64,977	-3.4	72,504	11.6	82,082	13.2	:	:

Source: eurostat

Non-metallic mineral products: NACE Rev. 1 Division 26

Table 6.3

Number of persons employed (units)

	1994	t / t-1 (%)	1995	t / t-1 (%)	1996	t / t-1 (%)	1997	t / t-1 (%)	1998	t / t-1 (%)
EU-15	1,077,150	-2.6	1,089,890	1.2	1,065,860	-2.2	1,050,950	-1.4	1,068,130	1.6
EUR-11	:	:	:	:	:	:	:	:	:	:
B	29,587	-1.2	37,471	26.6	36,205	-3.4	36,476	0.7	36,302	-0.5
DK	14,407	4.2	15,343	6.5	15,534	1.2	16,236	4.5	16,763	3.2
D	281,013	-6.3	284,334	1.2	264,987	-6.8	254,185	-4.1	247,124	-2.8
EL	14,450	-7.9	13,958	-3.4	13,937	-0.2	13,651	-2.1	14,105	3.3
E	154,353	-1.5	157,196	1.8	157,469	0.2	156,534	-0.6	165,335	5.6
F	130,577	-0.5	129,350	-0.9	131,292	1.5	129,179	-1.6	130,849	1.3
IRL	8,706	2.9	8,978	3.1	9,193	2.4	9,328	1.5	9,652	3.5
I	148,519	-4.6	145,740	-1.9	145,959	0.2	145,040	-0.6	153,228	5.6
L	3,105	-2.7	3,061	-1.4	2,972	-2.9	2,977	0.2	2,991	0.5
NL	:	:	:	:	:	:	:	:	:	:
A	33,459	0.6	31,722	-5.2	30,084	-5.2	28,793	-4.3	32,055	11.3
P	69,607	-0.7	69,865	0.4	71,374	2.2	71,752	0.5	70,599	-1.6
FIN	11,757	-2.4	12,563	6.9	12,354	-1.7	12,651	2.4	12,971	2.5
S	15,296	-12.4	16,029	4.8	15,944	-0.5	15,777	-1.0	15,789	0.1
UK	139,148	:	136,595	-1.8	132,562	-3.0	133,020	0.3	132,589	-0.3
Japan	445,369	-0.6	432,770	-2.8	421,840	-2.5	408,261	-3.2	:	:
USA	512,784	3.5	529,300	3.2	546,400	3.2	537,905	-1.6	:	:

Source: eurostat

Table 6.4

Labour costs (million ECU)

	1994	t / t-1 (%)	1995	t / t-1 (%)	1996	t / t-1 (%)	1997	t / t-1 (%)	1998	t / t-1 (%)
EU-15	29,975	0.2	31,387	4.7	31,468	0.3	31,155	-1.0	31,420	0.9
EUR-11	:	:	:	:	:	:	:	:	:	:
B	:	:	1,426	:	1,366	-4.2	1,334	-2.3	1,325	-0.7
DK	460	5.3	540	17.3	558	3.4	574	2.8	591	3.0
D	9,892	-0.7	10,717	8.3	10,063	-6.1	9,539	-5.2	9,572	0.3
EL	264	-1.6	275	4.2	297	8.0	308	3.6	255	-17.3
E	2,914	-5.1	3,026	3.8	3,155	4.3	3,013	-4.5	3,095	2.7
F	4,338	3.1	4,436	2.3	4,589	3.5	4,499	-2.0	4,282	-4.8
IRL	215	:	214	-0.1	238	10.8	260	9.3	252	-3.0
I	4,123	-4.4	3,992	-3.2	4,347	8.9	4,386	0.9	4,600	4.9
L	89	0.2	91	2.2	97	6.6	99	1.9	102	3.8
NL	919	2.9	971	5.7	948	-2.4	924	-2.5	976	5.7
A	1,282	4.2	1,324	3.3	1,300	-1.8	1,223	-5.9	1,325	8.3
P	657	0.5	701	6.7	717	2.3	696	-2.9	689	-1.1
FIN	297	11.5	368	24.0	371	0.8	377	1.5	379	0.8
S	444	-9.8	485	9.4	549	13.0	534	-2.6	519	-2.9
UK	2,972	:	2,821	-5.1	2,874	1.9	3,390	18.0	3,459	2.0
Japan	:	:	:	:	:	:	:	:	:	:
USA	:	:	:	:	:	:	:	:	:	:

Source: eurostat

Table 6.5

Extra-EU-15 exports (million ECU)

	1994	t / t-1 (%)	1995	t / t-1 (%)	1996	t / t-1 (%)	1997	t / t-1 (%)	1998	t / t-1 (%)
EU-15	10,808	16.0	12,033	11.3	12,547	4.3	14,699	17.2	14,279	-2.9
B/L	427	25.2	532	24.4	433	-18.6	547	26.3	449	-18.0
DK	179	3.6	197	9.7	114	-42.2	241	112.2	244	1.3
D	2,217	13.1	2,464	11.1	2,528	2.6	2,870	13.5	3,066	6.8
EL	230	37.4	197	-14.4	266	35.3	302	13.6	239	-20.8
E	1,165	15.7	1,321	13.4	1,471	11.3	1,511	2.7	1,513	0.1
F	1,411	9.1	1,537	8.9	1,668	8.5	1,793	7.5	1,741	-2.9
IRL	92	15.9	83	-9.9	149	79.3	139	-6.3	136	-2.6
I	2,766	20.0	2,946	6.5	3,407	15.6	3,845	12.9	3,841	-0.1
NL	202	17.5	212	4.8	229	8.1	289	26.1	273	-5.4
A	596	17.1	805	35.0	458	-43.1	942	105.6	784	-16.7
P	184	25.4	192	4.5	201	4.4	223	11.1	212	-5.0
FIN	156	29.0	177	13.7	127	-28.2	223	75.2	205	-8.2
S	219	30.1	254	16.1	283	11.6	317	11.7	288	-9.0
UK	964	10.6	1,117	15.8	1,214	8.7	1,458	20.1	1,287	-11.8

Source: eurostat

Table 6.6

Extra EU-15 imports (million ECU)

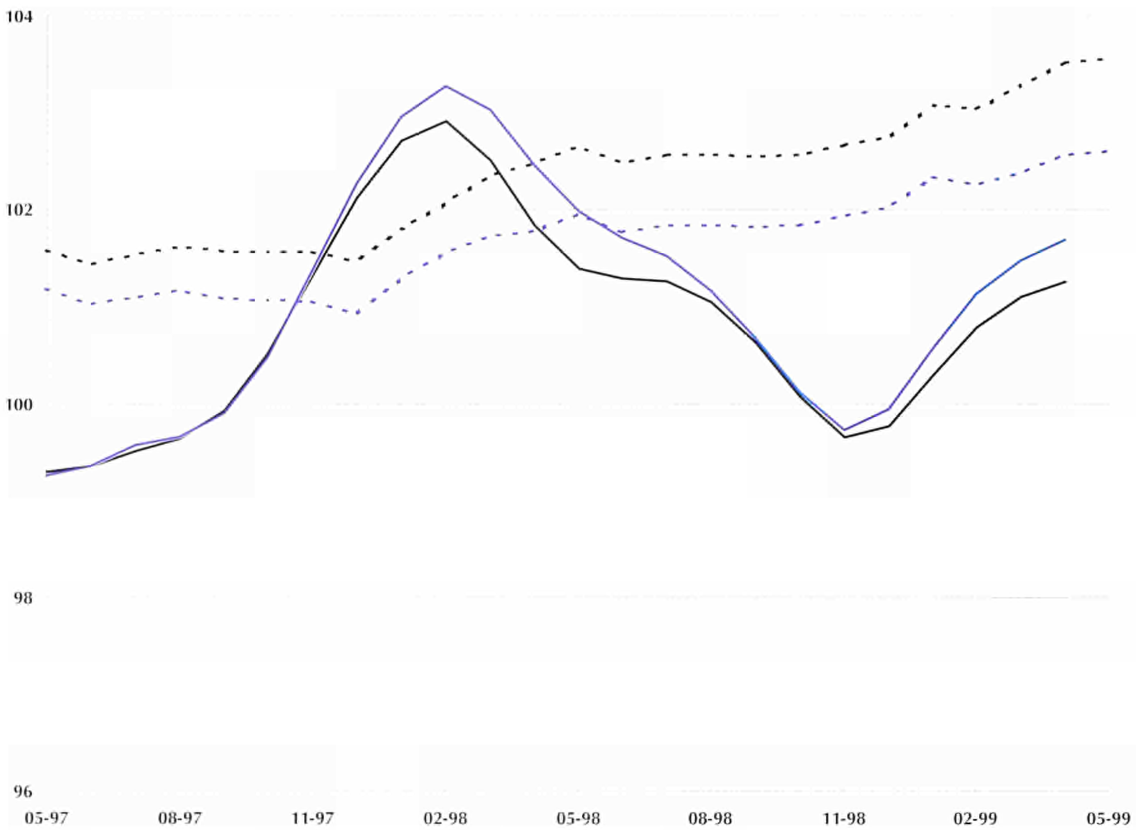
	1994	t / t-1 (%)	1995	t / t-1 (%)	1996	t / t-1 (%)	1997	t / t-1 (%)	1998	t / t-1 (%)
EU-15	4,564	11.4	5,131	12.4	5,262	2.6	5,943	12.9	6,498	9.3
B/L	227	4.0	256	12.7	256	0.2	315	23.0	399	26.7
DK	87	25.2	112	29.3	94	-16.1	125	32.4	142	13.7
D	1,808	17.1	2,078	14.9	1,987	-4.4	2,101	5.7	2,212	5.3
EL	71	-1.5	89	24.7	113	27.1	107	-5.0	111	3.2
E	159	-7.9	208	31.2	251	20.4	298	19.0	364	22.1
F	396	15.1	450	13.5	462	2.6	538	16.5	596	10.9
IRL	44	11.7	44	1.2	89	101.9	62	-30.5	63	1.6
I	397	2.7	478	20.4	462	-3.4	535	16.0	587	9.7
NL	334	5.4	350	4.9	340	-3.0	413	21.7	441	6.7
A	211	27.5	200	-5.5	277	38.8	355	28.1	360	1.4
P	19	-19.0	24	28.5	25	6.5	50	95.2	56	12.9
FIN	55	11.1	62	11.5	66	7.9	78	18.2	76	-3.1
S	164	7.3	167	2.0	180	7.6	194	8.3	193	-0.8
UK	593	9.1	614	3.6	661	7.6	771	16.8	899	16.5

Source: eurostat

Non-metallic mineral products: NACE Rev. 1 Division 26

Figure 6.9

Production and producer price indices (1995 = 100)



Source: eurostat

Table 6.7

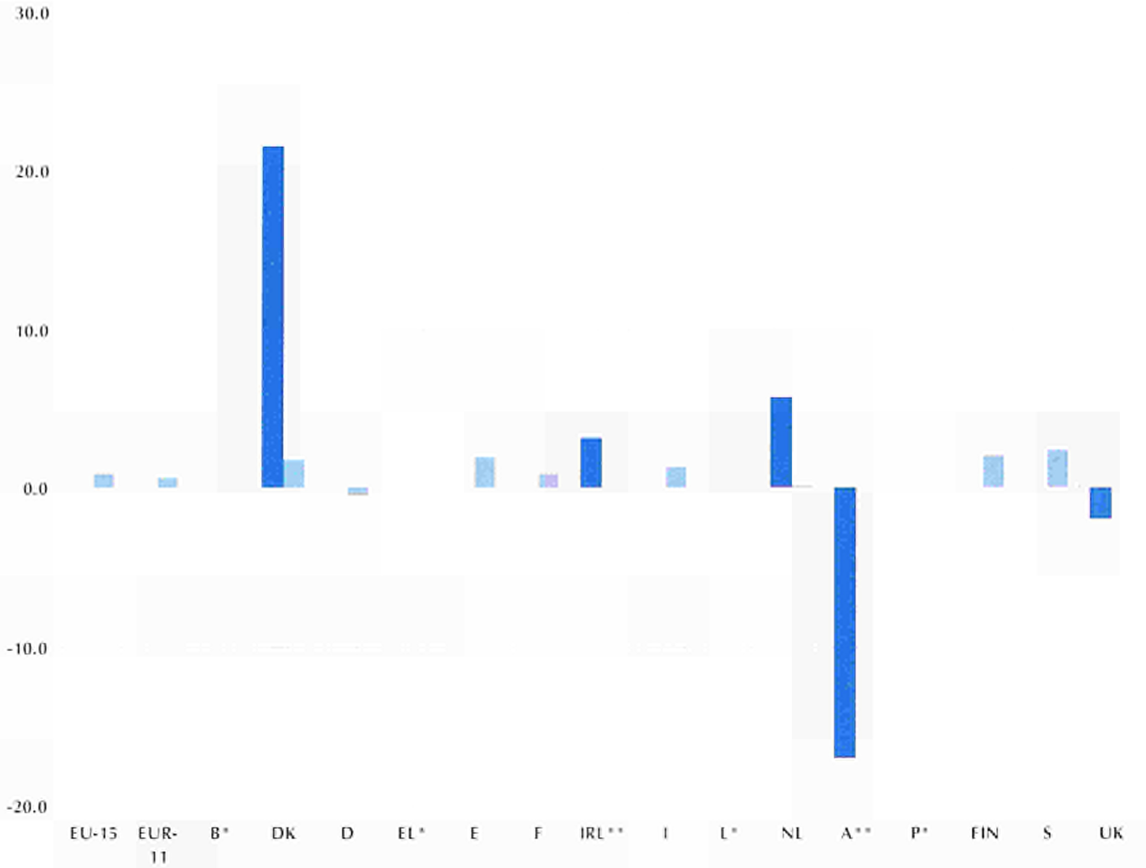
Production and producer price indices: growth rates (%)

	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	02-99	⇨	04-99	1.1	-1.6	05-99	0.5	0.9
EUR-11	02-99	⇨	04-99	1.4	-1.8	05-99	0.3	0.7
B	02-99	⇨	04-99	0.4	-2.7	04-99	1.0	1.7
DK	03-99	⇨	05-99	3.1	21.5	05-99	0.7	1.8
D	02-99	⇨	04-99	-1.2	-5.0	05-99	0.0	-0.5
EL	02-99	⇨	04-99	-1.1	-2.1	12-98	0.4	4.4
E	02-99	⇨	04-99	1.4	4.5	05-99	0.8	2.0
F	02-99	⇨	04-99	-1.0	-3.9	05-99	0.2	0.9
IRL	01-99	⇨	03-99	1.5	1.4	01-99	0.2	0.8
I	02-99	⇨	04-99	1.3	2.2	05-99	0.7	1.3
L	10-98	⇨	12-98	-0.6	6.9	12-98	0.0	1.8
NL	03-99	⇨	05-99	2.5	5.7	05-99	0.0	0.0
A	01-99	⇨	03-99	-0.4	-21.3		:	:
P	02-99	⇨	04-99	1.9	6.1	04-99	0.5	1.0
FIN	02-99	⇨	04-99	1.1	-0.6	05-99	0.3	2.0
S	02-99	⇨	04-99	2.4	8.7	05-99	0.7	2.3
UK	03-99	⇨	05-99	-1.1	-2.0	08-98	0.0	2.7
NO	12-98	⇨	02-99	-1.6	0.8	07-97	0.2	2.4
Japan	07-97	⇨	09-97	-0.8	0.8	10-97	-0.2	1.3
USA	11-97	⇨	01-98	0.7	4.5	01-98	0.3	1.3

Source: eurostat

Figure 6.10

Production and producer price indices: growth rate, three months compared to the same three months of the previous year, 02-99 to 04-99 (%)

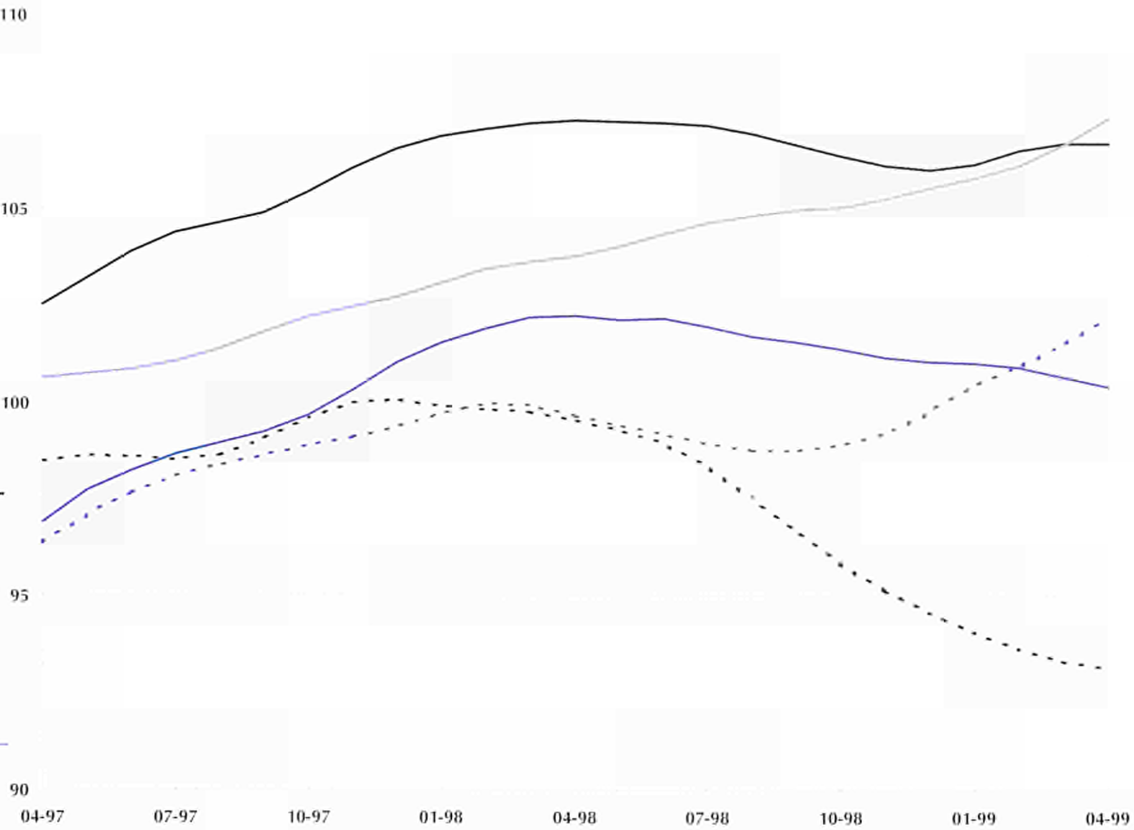


Production
Producer price index

Source: eurostat

Figure 6.11

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

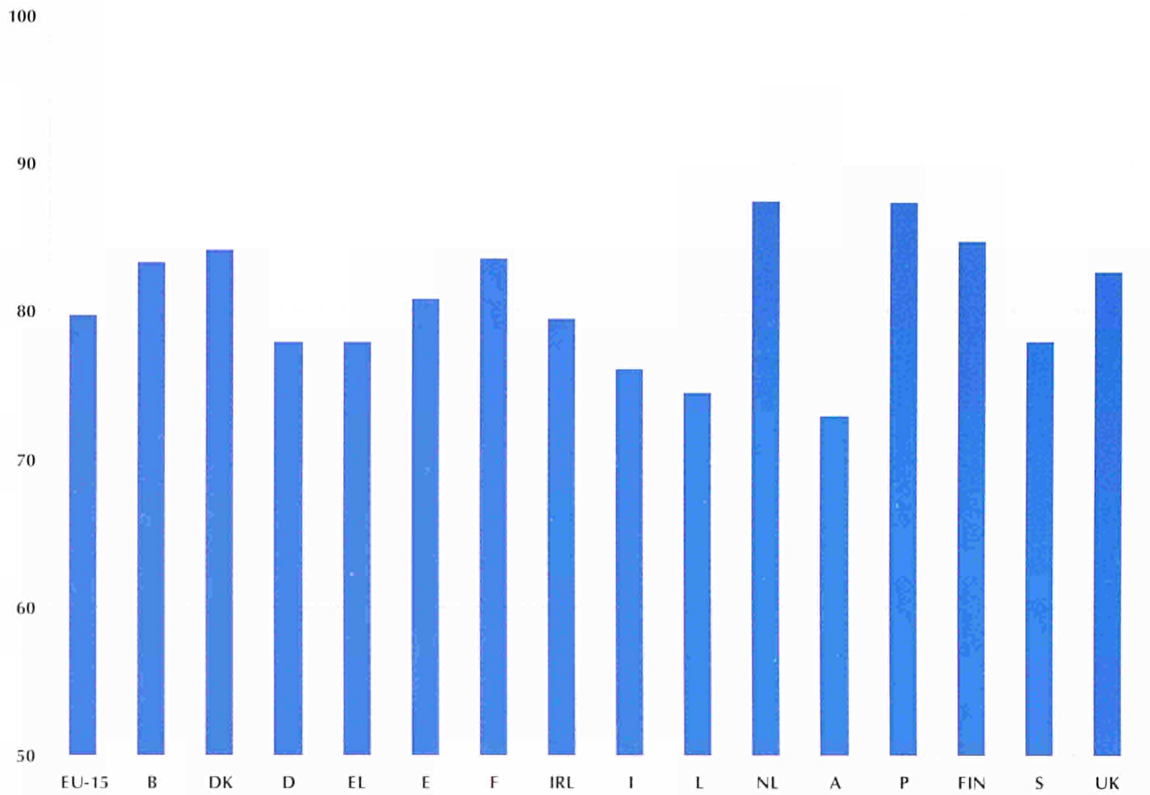


Glass and glass products
Non-refractory ceramic goods other than for construction; refractory ceramic prod.
Ceramic tiles and flags
Bricks, tiles and construction products, in baked clay
Cement, lime and plaster

Source: eurostat

Non-metallic mineral products: NACE Rev. 1 Division 26

Figure 6.12



Capacity utilisation rates, 04-99 (%)

Source: DG II, Business Survey

Table 6.8

Capacity utilisation rates (%)

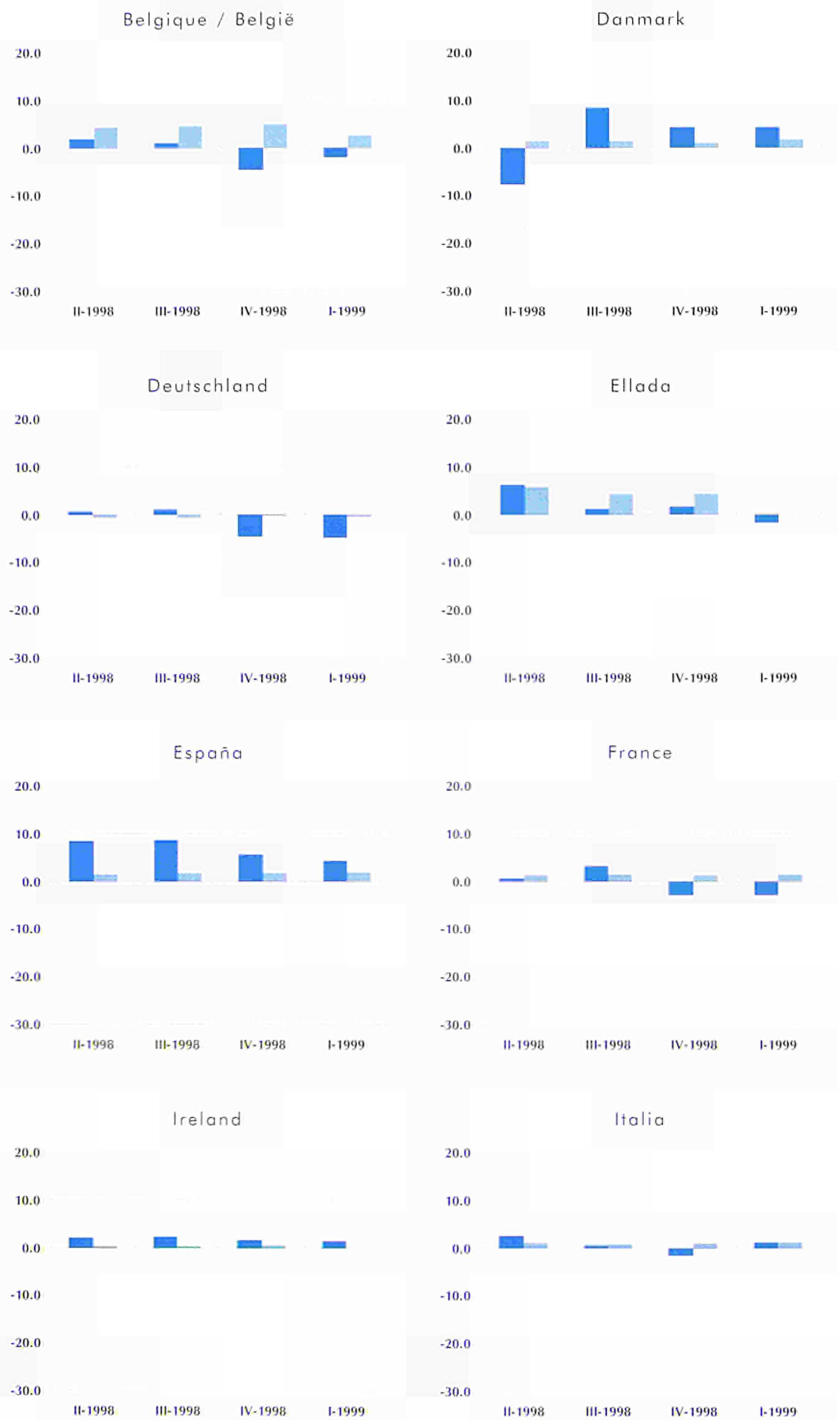
Growth rate: latest month, t / t-12 (%)		07-98	10-98	01-99	04-99
EU-15	-0.7	81.8	79.9	76.9	79.8
B	-4.8	85.5	85.3	75.0	83.3
DK	9.8	85.1	86.4	79.4	84.2
D	1.7	79.8	78.1	72.5	78.0
EL	-14.3	85.0	85.0	83.0	78.0
E	2.0	80.9	80.8	:	80.9
F	-3.6	87.5	83.3	83.5	83.6
IRL	-1.2	90.4	90.0	79.4	79.6
I	-1.8	77.8	75.0	76.4	76.2
L	-8.2	83.1	86.3	78.5	74.6
NL	-3.0	89.9	89.3	86.3	87.5
A	-5.6	79.9	74.3	71.2	73.0
P	-0.3	86.7	84.5	86.6	87.4
FIN	-1.5	90.2	85.4	79.9	84.7
S	-2.5	79.0	78.0	78.0	78.0
UK	1.0	82.9	84.1	77.0	82.7

Source: DG II, Business Survey

Non-metallic mineral products: NACE Rev. 1 Division 26

Figure 6.13

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



Production index

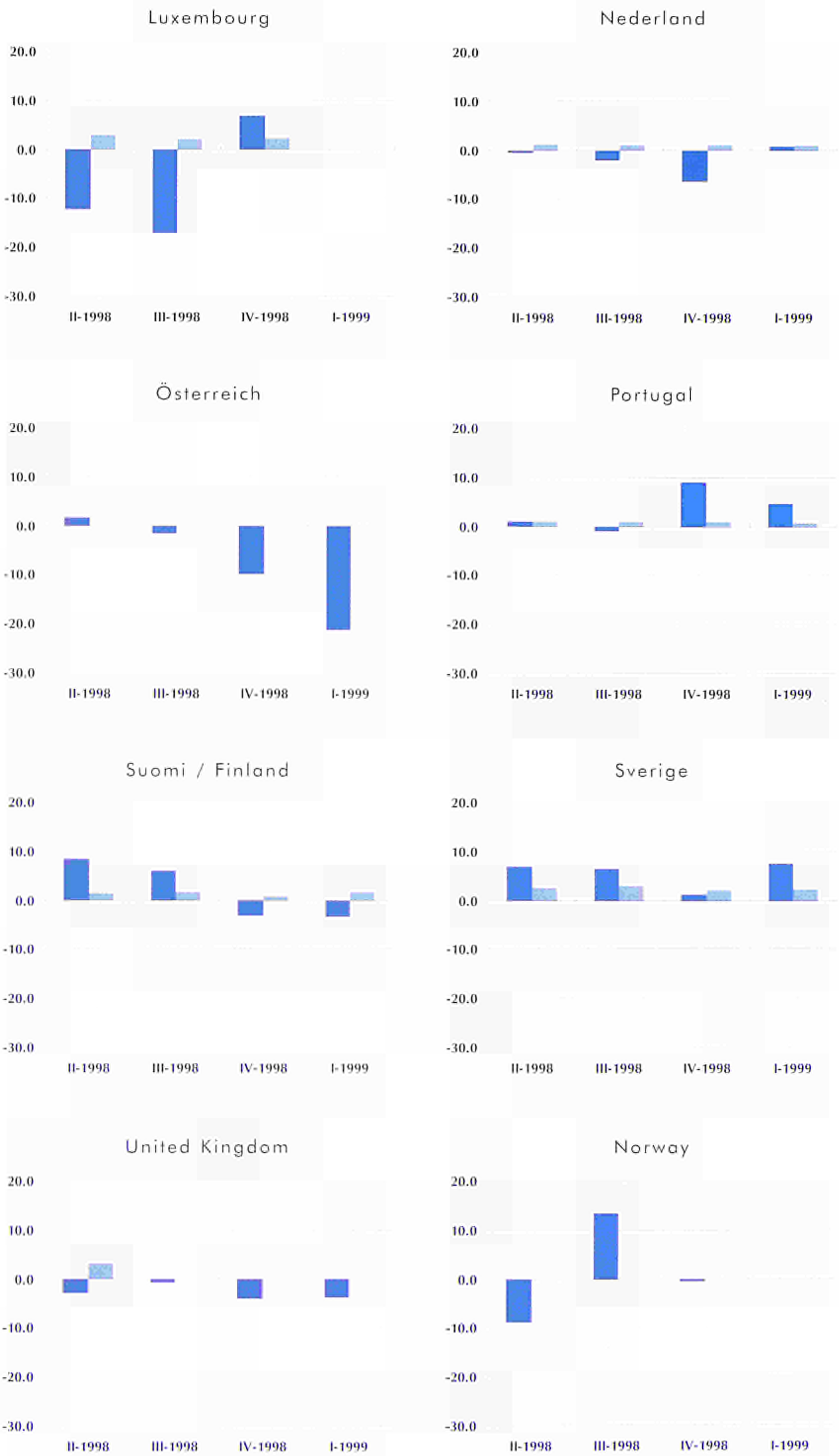
Producer price index

Source: eurostat

Non-metallic mineral products: NACE Rev. 1 Division 26

Figure 6.13

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



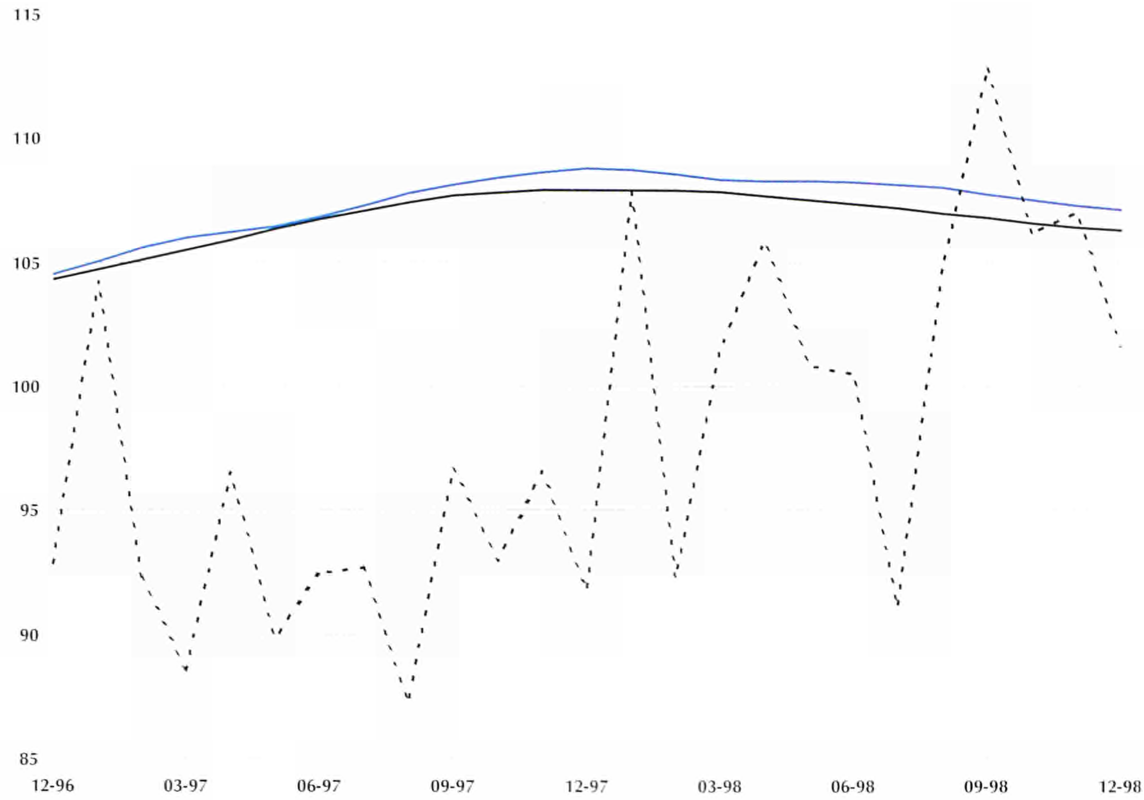
Production index

Producer price index

Source: eurostat

Figure 6.14

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



Export value index
Import value index
Terms of trade

Source: eurostat

Table 6.9

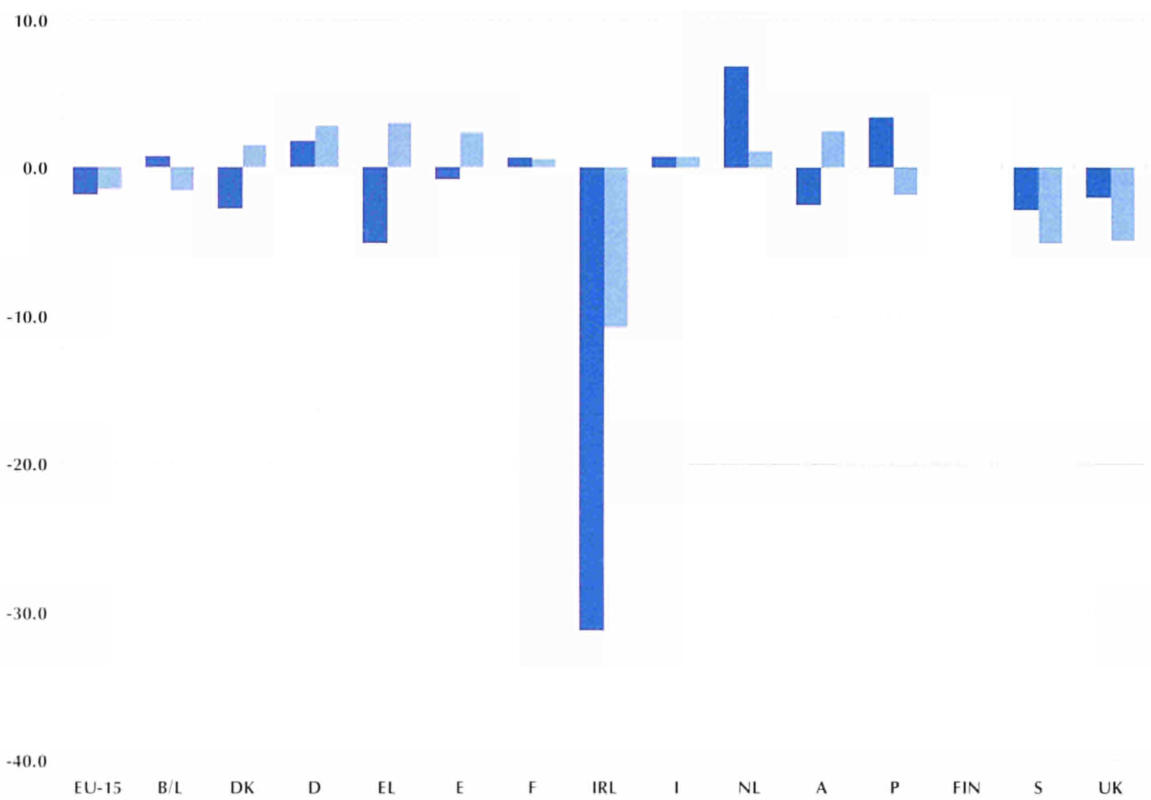
Foreign trade indices (value indices are in ECU terms): growth rate, three months compared to the previous three months (%)

	Latest 3 months available			Exports Value	Exports Volume	Imports Value	Imports Volume	Terms of trade
EU-15	10-98	⇨	12-98	-0.5	-2.4	-0.6	-0.1	2.0
B / L	10-98	⇨	12-98	-0.2	-3.1	-0.6	-1.4	8.0
DK	10-98	⇨	12-98	-0.5	1.2	0.4	-3.5	-2.1
D	10-98	⇨	12-98	0.2	-2.9	-0.1	-1.9	7.6
EL	10-98	⇨	12-98	-2.8	-5.2	-5.1	0.4	34.5
E	10-98	⇨	12-98	-0.4	0.5	-0.1	5.2	15.2
F	10-98	⇨	12-98	-0.2	-2.0	-0.3	1.1	1.1
IRL	10-98	⇨	12-98	-8.1	9.1	-4.0	4.1	-7.6
I	10-98	⇨	12-98	0.1	-1.3	-0.3	-1.2	12.7
NL	10-98	⇨	12-98	0.9	-4.3	0.5	-12.9	8.5
A	10-98	⇨	12-98	-0.8	4.6	0.9	-4.0	:
P	10-98	⇨	12-98	-0.4	-0.9	-1.1	-6.4	-4.8
FIN	10-98	⇨	12-98	0.1	-3.0	-0.3	-2.8	:
S	10-98	⇨	12-98	-0.7	-5.4	-1.5	2.3	:
UK	10-98	⇨	12-98	-0.4	-3.4	-1.6	-4.6	8.3

Source: eurostat

Non-metallic mineral products: NACE Rev. 1 Division 26

Figure 6.15



Foreign trade indices in ECU terms: growth rate, three months compared to the same three months of the previous year, 10-98 to 12-98 (%)

Export value

Import value

Source: eurostat

Table 6.10

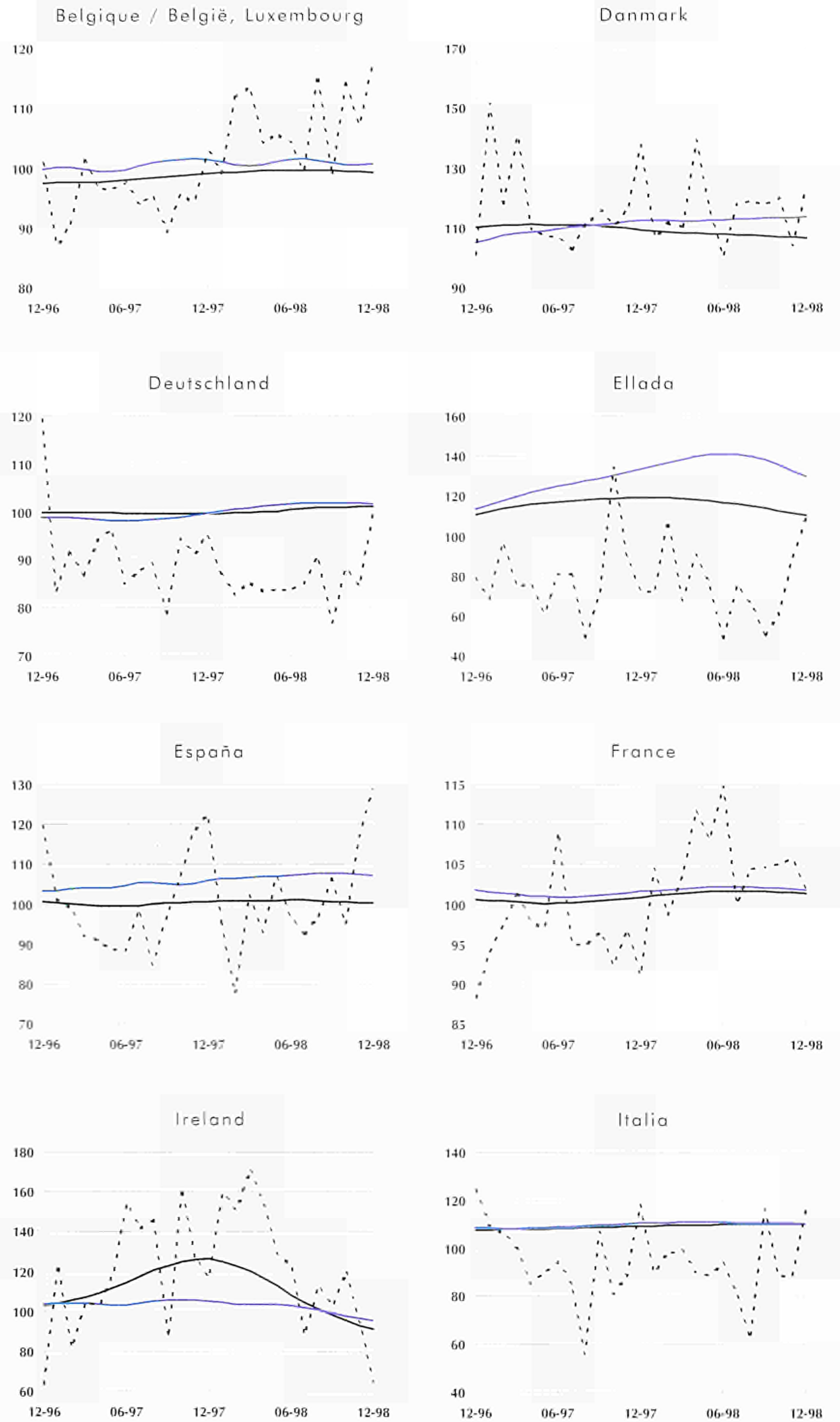
	Latest 3 months available			Exports Value	Exports Volume	Imports Value	Imports Volume	Terms of trade
EU-15	10-98	⇨	12-98	-1.9	-6.2	-1.5	5.5	11.9
B / L	10-98	⇨	12-98	0.8	-6.5	-1.5	6.1	15.9
DK	10-98	⇨	12-98	-2.7	0.0	1.6	0.6	-4.8
D	10-98	⇨	12-98	1.8	-0.6	2.8	-3.1	-3.1
EL	10-98	⇨	12-98	-5.1	-3.4	3.1	-7.4	-12.7
E	10-98	⇨	12-98	-0.8	0.1	2.3	0.6	-2.0
F	10-98	⇨	12-98	0.7	-7.2	0.6	3.5	11.5
IRL	10-98	⇨	12-98	-31.2	32.9	-10.8	16.9	-30.8
I	10-98	⇨	12-98	0.8	-6.3	0.8	-4.1	1.6
NL	10-98	⇨	12-98	6.9	-30.0	1.2	-34.9	-1.6
A	10-98	⇨	12-98	-2.5	-5.2	2.5	-0.9	:
P	10-98	⇨	12-98	3.5	-3.2	-1.9	2.7	10.9
FIN	10-98	⇨	12-98	0.0	-8.8	0.1	-6.0	:
S	10-98	⇨	12-98	-2.9	-13.4	-5.1	8.0	:
UK	10-98	⇨	12-98	-2.0	-12.2	-4.9	-2.8	13.3

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

Source: eurostat

Figure 6.16

Foreign trade indices in ECU terms (1995 = 100)



Export value index

Import value index

Terms of trade

Source: eurostat

Non-metallic mineral products: NACE Rev. 1 Division 26

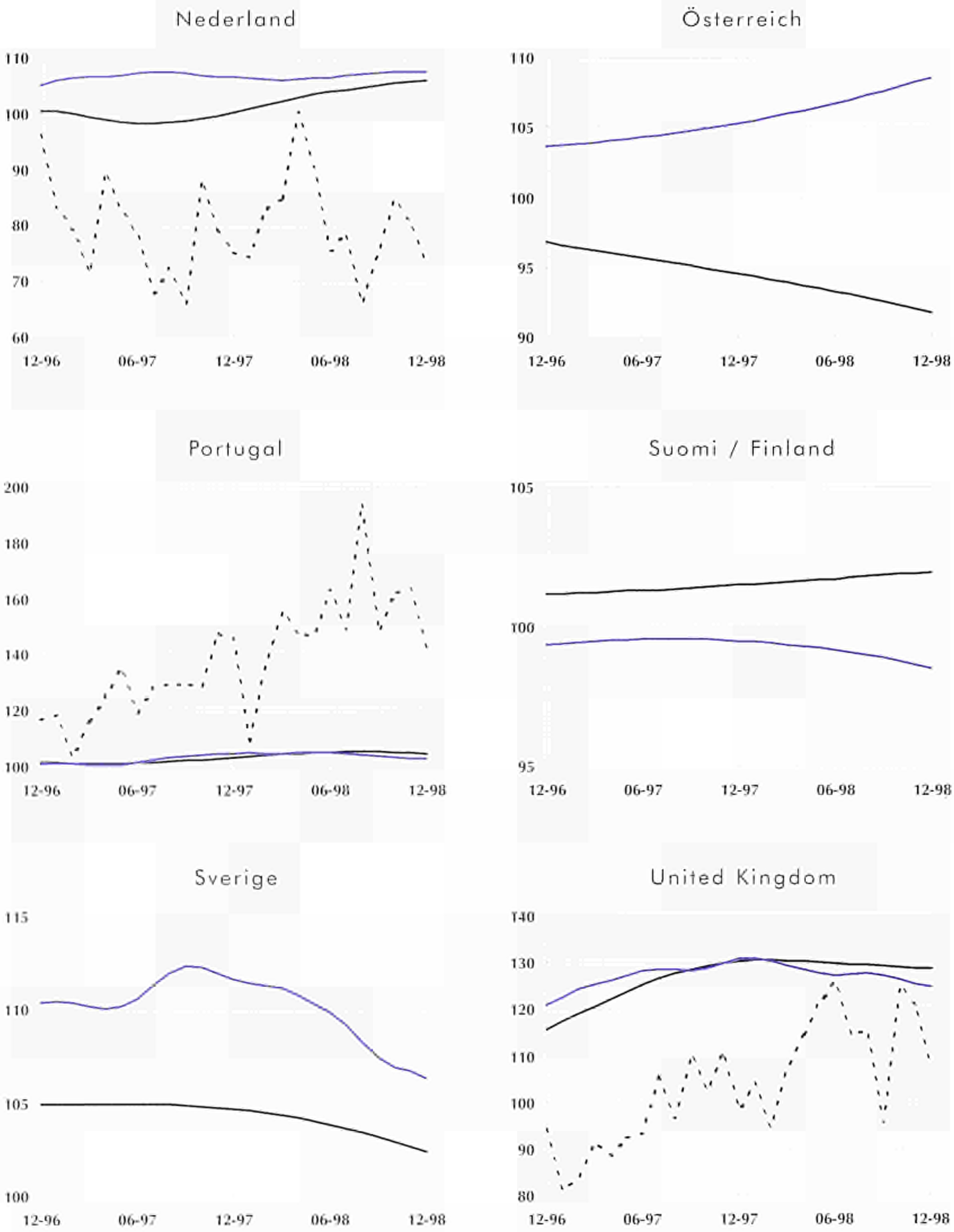


Figure 6.16

Foreign trade indices in ECU terms (1995 = 100)

Export value index

Import value index

Terms of trade

Source: eurostat

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 Statistics" ISBN 92-828-2879-4.

Full methodological notes for this publication may be found on page 109.

MONTHLY PANORAMA OF EUROPEAN BUSINESS - CD-ROM

As well as being available as a paper publication it is also possible to purchase a CD-ROM of the Monthly Panorama of European Business. The CD-ROM is provided with Adobe Acrobat version 3.0 files of the three language versions of the paper publication. These files can be printed or alternatively the user can perform searches for a keyword within them.

The main added value of the electronic publication is that it includes a wide range of short-terms statistics from official national sources. The data are supplied by the national statistical offices of each Member State to Eurostat. Data are then harmonised so that comparisons can be carried out between the national data. Furthermore, European totals are generated for the EU as a whole (EU-15), as well as for the euro-zone (the eleven countries that have formed Monetary Union). Data are provided for lengthy time-series on a monthly basis (often back as far as 1990). The data are normally updated on a monthly basis on the CD-ROM, although some series are only provided every quarter.

Data are supplied for total industry and for the main industrial groupings, in other words intermediate goods, capital goods, consumer durables and consumer non-durables. Furthermore, the data is supplied each month for all NACE Rev. 1 industrial groupings at the 2-digit level of the Division - using the statistical classification of economic activities nomenclature.

The data is available in easily read text files (*.TXT) that can be read by almost all PC's using either a spreadsheet or a database software package. For users who wish to use a spreadsheet directly, the same data is also provided in MS Excel 5.0 format. Data is provided using a comma separator for decimal points (for mainland European users) and using a point separator for the decimal (for the United Kingdom and Ireland).

For more information on this product please contact a Eurostat Datashop, see below for details.

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7. Methodological notes

Activity 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

NACE Rev. 1 Sections

C + D + E,

i.e. mining, manufacturing and energy supply

Intermediate goods industries

NACE Rev. 1 Groups

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

NACE Rev. 1 Groups

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

NACE Rev. 1 Groups

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

Non-durable consumer goods industries

NACE Rev. 1 Groups

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 National Statistical Offices. 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 EOIX which produced using the business surveys carried out on behalf of the Directorate General for Economic Affairs of the Commission (DG II) as a leading indicator;

3) the estimates for the latest years' structural data, which are made by Eurostat;

4) 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 is base year 1995. The indices are adjusted to take account of the varying number of working days in the month.

The Expected Output Index (EOI) links several aspects of information from qualitative business opinion surveys conducted by DG II (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.

The index of producer prices shows the changes in the ex-works selling prices of all products sold on domestic markets of the various countries, excluding VAT and other taxes. 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 construction indicators, please note that the information on prices supplied for Denmark, Italy and Finland refers to input prices for new residential buildings. Data for Ireland and Sweden also provide input prices, which are for one-dwelling buildings only. All other countries provide output prices for new residential buildings. With respect to data on building permits, the figures refer to the number of dwellings for all countries except the United Kingdom, where the data reported is for the number of building starts. Irish data for these series is in the form of quarterly and not monthly series. Danish and Italian data are estimates.

For services short-term indicators the data collection is in its infancy. There are three main areas covered in this publication. The volume of retail sales (or deflated turnover) is defined as the ratio between the indices of sales at current prices (value indices) and the corresponding price indices (deflator of sales) which are the prices of goods sold through retail outlets. For some countries this deflator of sales can only be approximately estimated. The total retail sales' index corresponds to NACE Rev.1 52 excluding repair works (i.e. NACE Rev. 1 52.7). Volume sales' indices are available for the following groupings:

Food, beverages and tobacco (NACE Rev. 1 52.11 + 52.2)

Textiles, clothing, footwear, leather goods (NACE Rev. 1 52.41 to 52.43)

Household equipment and specialised stores (NACE Rev. 1 52.44 to 52.46)

The figures on car registrations refer to the number of the first registrations of private and commercial cars (motorised road vehicles for the transport of passengers with seats for a maximum of 9 persons). Hire vehicles for mixed use are also included (for the transport of goods and/or passengers).

Data on the number of guest flows (tourism data) is provided. The tourism data refers to the occupancy of collective accommodation establishments, both for domestic and inbound tourism (residents and non-residents).

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

EU-15 and EUR-11 aggregates

EU-15 and EUR-11 data is estimated when 60% of the weighted national data is available. Missing data is estimated using ARIMA.

For further details of the methodology employed, please refer to the Eurostat publication "Methodology of Industrial Short-term Statistics" ISBN 92-828-2879-4. Further data on short-term indicators may be obtained by consulting the EBT domain of theme 4 in the Eurostat reference database, for details please contact the Eurostat Datashop network.

Seasonal adjustment

All series, except prices and capacity utilisation, are seasonally adjusted. If the National Statistical Office does the seasonal adjustment, these series are used. This is currently the case for Belgium, Denmark, Greece, France, Italy, Finland, Sweden, the United Kingdom and Norway (although not necessarily for all variables). If no seasonally adjusted series are supplied, Eurostat perform the seasonal adjustment with TRAMO / SEATS, a method developed by Professor Maravall and V. Gomez. Otherwise, Eurostat calculates the trend cycle (except for Germany) 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, where t is the average of a three-month period) - 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, where t is again the average of a three-month period) - 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 the average of a three-month period) - here gross data for prices is used. Estimates are sometimes made to create an 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 (t/t-12 the average of a three-month period) or three months compared to the same three months of the previous year (t/t-4, the average of a three-month period). 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

There are two collections of data that are used for the presentation of data in sections 5 and 6 of the publication, one set of data is used for industrial activities and the other for services' activities. In order to obtain data with a lengthy time-series it is at present not possible to use the SBS Regulation data for enterprises of all size classes.

For industrial activities the 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. Further data on industrial activities may be obtained by consulting the SBS enter I and SBS Plus domains of theme 4 in the Eurostat reference database, for details please contact the Eurostat Datashop network.

For service activities that are often covered in section 6 the data covers the whole population of enterprises. Hence, data covers small and medium sized enterprises too. However, for these series it is not at present possible to estimate EU totals, nor to use short-term indicators as a proxy for extending series (nowcasting). Further data on service activities may be obtained by consulting the SBS enter domain of theme 4 of the Eurostat reference database, for details please contact the Eurostat Datashop network.

Data is provided in ECU terms before monetary union on January 1st 1999. Fixed exchange rates exist for eleven countries forming the euro-zone from this date onwards. Whilst data in both ECU and Euro terms exists jointly in a table, it is labelled as ECU.

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 Gunter Schäfer - tel: (352) 4301 33566 or e-mail: gunter.schaefer@eurostat.cec.be

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