

Industry

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Industry

- Industrial sector turnover increased by 111% between 1996 and 2002.
- Gross output for industrial local units increased by 105% between 1996 and 2002.
- In 1996 16% of manufacturing local units were foreign owned whereas the figure was 14% in 2002. However, the proportion of Gross Output accounted for by foreign owned local units increased from 66% to 80%.
- In 2002 there were almost 5,000 industrial enterprises employing nearly 254,000 people, with a total turnover of €108bn.
- In 2002 51% of the total turnover of industrial enterprises was accounted for by those employing over 500 people, up from 30% in 1996.
- The greatest increase in the volume of industrial production (with price changes eliminated) between 2000 and 2004 occurred in the publishing, printing and reproduction of recorded media sector (52%).

Introduction

This chapter contains information on the industrial sector. The information is drawn from the annual Census of Industrial Production (CIP) and the various short-term industrial releases of the CSO.

Industrial statistics are compiled by the CSO using inquiries to industrial firms. The most detailed inquiry is the CIP which is an annual census of such firms designed to provide information on the structure of industry. To allow for short-term analysis of industry between censuses there are a number of less detailed monthly or quarterly inquiries which track the intra-year trend in some of the major CIP aggregates such as turnover, stock changes and capital acquisitions. In addition a short-term inquiry measures the change in volume terms (ie eliminating price changes) of industrial output. The data on wages and salaries and on employment in industry are tracked on a short-term basis by a CSO inquiry – see Chapter 16.

The information is broken down by sector using the standard EU-wide NACE Rev.1.1 classification for 2002 CIP data and NACE Rev.1 classification for preceding years.

Tables 10.1 to 10.4 show aggregates from the CIP over the most recent years. The CIP covers firms with 3 or more persons engaged and consists of two separate but closely related inquiries, one covering enterprises and the other covering local units. The former relates to the trading dimension of firms and Table 10.1 shows the main trading aggregates for industrial enterprises over the most recent seven years. The latter focuses on the industrial process and Table 10.2 shows the main aggregates relating to the industrial process for industrial local units.

Tables 10.3 and 10.4 provide a sectoral breakdown of some of those aggregates for the most recent year.

Table 10.5 shows information by sector on the trend in the volume of production in industry over the most recent full five years. This is based on a monthly inquiry to firms covered in the CIP. It is confined to firms with 20 or more persons engaged but reflects very closely production trends in the entire sector. The effect of price changes is eliminated from the data to reflect the underlying volume changes.

Table 10.6 shows annual volume indices of production divided between the "Modern" and "All Other" sectors over the most recent full five years.

Tables 10.7 and 10.8 show the changes in stocks and capital acquisitions in recent years, again by sector. This information comes from a quarterly inquiry to industrial firms with 20 or more persons engaged.

The results

From table 10.1 for the 7 year period 1996 to 2002 there has been a marked increase in turnover of about 111%. This increase is reflected in increased exports. Table 10.3 shows that, in terms of turnover value, the chemicals,

electrical (including computers) and optical equipment, and food products, beverages and tobacco sectors predominate. In 2002 they accounted for approximately 29%, 26% and 20% of total turnover respectively. These sectors between them accounted for 52% of total industrial employment.

Table 10.5 shows that in volume terms (ie eliminating price changes) the volume of industrial production increased by 25 % between 2000 and 2004. For particular sectors the volume increase was much greater, volume increased by 52% in the Publishing,printing and reproduction of recorded media sector and volume in the chemicals sector increased by 44%. There was a fall of about 64% in the leather industry. Looking at the categorisation of production by main use, the production of intermediate products showed an 18% increase and capital goods was up by 26%.

The increase in the volume of consumer goods was 32%. Table 10.6 compares the situation in "Modern" and "Traditional" sectors. The "Modern" sector comprises a number of high-technology and chemical sectors. There has been a 36% increase in production in the "Modern" sector between 2000 and 2004. This contrasts with growth of about 8% in all other sectors.

Enterprise

An enterprise is the smallest combination of legal units that is an organisational unit producing goods and services, which benefits from a certain degree of autonomy in decision-making, especially for the allocation of its current resources. In practice it is equivalent to a company or firm.

Local unit

A local unit is defined as an enterprise or part thereof situated in a geographically identified place. The different geographical locations in which an enterprise conducts industrial activities are treated as separate local units.

Turnover

Turnover comprises the net selling value of goods manufactured by an enterprise, of industrial services provided for others, of goods resold without further processing and other minor miscellaneous items.

Gross value added

This is defined as production value less intermediate consumption.

Gross output

Gross output represents the net selling value of all goods manufactured in the year, whether sold or not, including work done and capital assets manufactured for own use.

Table 10.1 Main aggregates for enterprises in all industries

	Unit	1996	1997	1998	1999	2000	2001	2002
Number of enterprises	No.	4,376	4,516	4,491	4,599	4,873	4,870	4,996
Persons engaged	No.	241,393	255,034	257,729	263,056	268,634	264,198	253,842
Males	No.	162,893	170,254	172,787	177,548	181,815	179,527	174,170
Females	No.	78,500	84,780	84,942	85,508	86,819	84,671	79,672
Turnover	€m	50,922	57,829	68,144	82,864	100,296	105,720	107,683
<i>of which exports</i>		32,706	36,845	47,808	60,257	74,165	79,317	81,530
Purchases	€m	33,088	37,368	45,605	54,153	66,451	70,759	68,558
Material and fuels	€m	21,556	23,889	26,678	30,559	37,355	38,579	36,141
Services and goods for factoring	€m	11,532	13,480	18,927	23,594	29,097	31,681	32,417
Gross value added	€m	18,179	21,311	23,517	30,060	36,883	35,815	39,507
Labour costs	€m	6,038	6,507	7,061	7,599	8,282	8,929	9,157
Wages and salaries	€m	5,005	5,460	5,908	6,356	6,935	7,367	7,567
Other labour costs	€m	1,032	1,046	1,152	1,244	1,362	1,562	1,590
Stocks at end of year	€m	4,754	5,304	5,840	6,843	8,328	8,510	8,121
Increase during year	€m	-118	541	637	992	1,229	66	-7
Additions to capital assets during year	€m	2,590	2,909	4,054	4,614	4,184	4,691	5,143

Source: CSO

Persons engaged in all industries

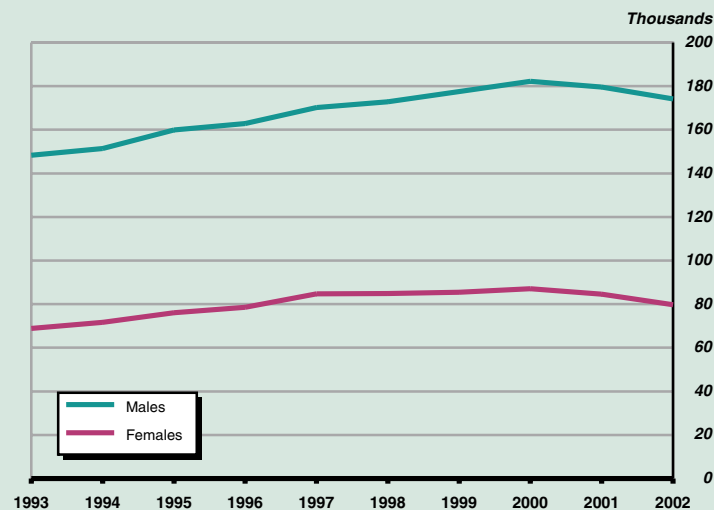


Table 10.2 Main aggregates for industrial local units in all industries

	Unit	1996	1997	1998	1999	2000	2001	2002
Number of local units	No.	4,803	4,956	4,932	5,025	5,296	5,321	5,535
Persons engaged	No.	244,585	257,933	260,357	266,123	272,590	268,240	258,435
Males	No.	166,075	173,217	175,530	180,844	185,614	183,367	178,342
Females	No.	78,510	84,716	84,827	85,279	86,976	84,873	80,124
Gross output	€m	48,830	55,537	64,628	77,803	94,472	98,374	99,966
Industrial inputs	€m	24,089	26,795	28,964	33,386	39,791	42,234	39,594
Industrial materials	€m	22,358	24,842	26,836	31,002	36,818	38,368	35,583
Fuel and power	€m	962	1,036	1,065	1,112	1,332	1,592	1,609
Industrial services	€m	773	918	1,063	1,272	1,640	2,274	2,402
Net output	€m	24,737	28,743	35,664	44,417	54,681	56,140	60,373
Wages and salaries	€m	5,061	5,514	5,955	6,431	7,029	7,489	7,692
Remainder of net output	€m	19,676	23,229	29,709	37,986	47,652	48,651	52,681
Stocks at end of year	€m	4,787	5,337	5,850	6,845	8,318	8,201	8,216
Increase during year	€m	-122	541	642	1,013	1,256	-2	-6
Additions to capital assets during year	€m	2,616	2,924	4,127	4,763	4,487	5,224	5,408

Source: CSO

Gross output and net output

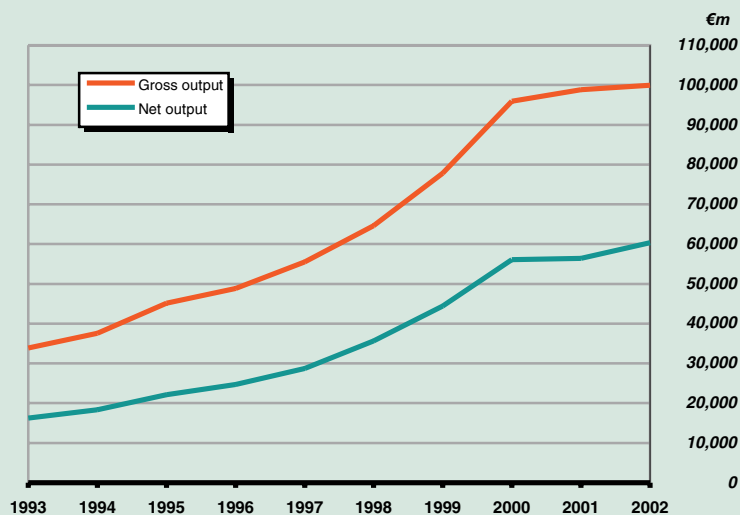


Table 10.3 Main aggregates for enterprises in each industrial sector, 2002

Industrial sector	NACE code	Enterprises	Turnover	Gross value added	Labour costs	Persons engaged
Mining and quarrying	10-14	89	1,195	410	239	5,517
Manufacture of food products, beverages and tobacco	15-16	696	21,009	7,419	1,739	50,865
Food products and beverages	15	690	19,351	5,995	1,697	50,021
Tobacco products	16	6	1,658	1,425	42	844
Textiles and textile products	17-18	289	802	271	206	8,017
Textiles	17	178	508	180	132	4,877
Wearing apparel; dressing and dyeing of fur	18	111	295	91	74	3,140
Leather and leather products	19	25	68	13	13	553
Wood and wood products	20	308	970	311	172	6,298
Pulp, paper and paper products; publishing and printing	21-22	652	11,061	3,618	888	23,164
Manufacture of pulp, paper and paper products	21	115	835	336	180	4,898
Publishing, printing and reproduction of recorded media	22	537	10,226	3,282	708	18,265
Chemicals, chemical products and man-made fibres	24	215	31,544	16,259	1,119	25,317
Rubber and plastic products	25	274	1,176	432	263	9,371
Other non-metallic mineral products	26	287	1,763	705	374	11,033
Basic metals and fabricated metal products	27-28	687	1,843	653	473	15,420
Basic metals	27	93	372	111	80	2,123
Fabricated metal products, except machinery and equipment	28	594	1,471	542	394	13,298
Machinery and equipment, not elsewhere classified	29	334	1,733	641	417	12,741
Electrical and optical equipment	30-33	437	28,391	6,188	2,046	56,224
Manufacture of office machinery and computers	30	68	16,065	1,442	564	14,230
Manufacture of electrical machinery and apparatus not elsewhere classified	31	181	2,990	854	374	11,875
Manufacture of radio, television and communication equipment and apparatus	32	59	4,222	1,608	412	9,965
Medical, precision and optical instruments, watches and clocks	33	129	5,115	2,284	696	20,153
Transport equipment	34-35	117	1,018	369	275	7,971
Manufacture of motor vehicles, trailers and semi-trailers	34	74	527	163	99	3,510
Manufacture of other transport equipment	35	43	490	205	175	4,461
Manufacturing nec; recycling; manufacture of coke, refined petroleum products and nuclear fuel	36-37, 23	569	2,138	609	324	11,379
Manufacturing nec; manufacture of coke, refined petroleum products and nuclear fuel	36, 23	546	2,043	580	313	11,028
Recycling	37	23	95	29	11	351
Electricity, gas, steam and hot water supply	40	17	2,973	1,610	610	9,973
All industries	1-4	4,996	107,683	39,507	9,157	253,842
Transportable goods industries	1-3	4,979	104,710	37,898	8,547	243,870
Manufacturing industries	15-37	4,890	103,515	37,488	8,308	238,353

Source: CSO

Table 10.4 Main variables for local units in each industrial sector, 2002

Industrial sector	NACE code	Local units	Gross output	Industrial inputs	Net output	Wages and salaries	Persons engaged
		No.	€m	€m	€m	€m	No.
Mining and quarrying	10-14	187	1,070	524	546	216	6,025
Manufacture of food products, beverages and tobacco	15-16	826	16,689	8,322	8,367	1,423	50,113
Food products and beverages	15	820	16,332	8,244	8,088	1,394	49,371
Tobacco products	16	6	358	80	278	29	742
Textiles and textile products	17-18	302	672	347	325	175	8,116
Textiles	17	186	444	240	204	111	4,916
Wearing apparel; dressing and dyeing of fur	18	116	228	106	122	64	3,200
Leather and leather products	19	26	53	39	14	11	553
Wood and wood products	20	311	882	514	368	144	6,353
Pulp, paper and paper products; publishing and printing	21-22	681	10,578	2,398	8,180	735	23,412
Manufacture of pulp, paper and paper products	21	120	753	351	402	149	4,922
Publishing, printing and reproduction of recorded media	22	561	9,825	2,046	7,779	586	18,489
Chemicals, chemical products and man-made fibres	24	250	30,206	4,649	25,557	908	25,436
Rubber and plastic products	25	278	1,093	561	532	224	9,425
Other non-metallic mineral products	26	370	1,472	715	757	298	10,517
Basic metals and fabricated metal products	27-28	700	1,746	973	773	405	15,709
Basic metals	27	95	349	225	124	67	2,119
Fabricated metal products, except machinery and equipment	28	605	1,397	747	650	338	13,591
Machinery and equipment, not elsewhere classified	29	344	1,651	882	769	344	12,747
Electrical and optical equipment	30-33	459	27,591	16,478	11,113	1,679	56,685
Manufacture of office machinery and computers	30	70	15,926	10,909	5,017	478	14,675
Manufacture of electrical machinery and apparatus not elsewhere classified	31	189	2,970	1,810	1,160	308	12,365
Manufacture of radio, television and communication equipment and apparatus	32	61	3,849	1,679	2,170	335	9,965
Medical, precision and optical instruments, watches and clocks	33	139	4,845	2,079	2,766	558	19,679
Transport equipment	34-35	130	1,059	592	467	297	9,755
Manufacture of motor vehicles, trailers and semi-trailers	34	84	553	335	218	116	4,467
Manufacture of other transport equipment	35	46	505	256	249	181	5,288

Table 10.4 Main variables for local units in each industrial sector, 2002 (continued)

Industrial sector	NACE code	Local units	Gross output	Industrial inputs	Net output	Wages and salaries	Persons engaged
		No.	€m	€m	€m	€m	No.
Manufacturing nec; recycling; manufacture of coke, refined petroleum products and nuclear fuel	36-37,23	579	1,906	1,245	661	269	11,480
Manufacturing nec; manufacture of coke, refined petroleum products and nuclear fuel	36,23	553	1,820	1,194	626	260	11,125
Recycling	37	26	86	51	35	9	355
Electricity, gas and water supply	40-41	92	3,299	1,357	1,942	563	12,110
Electricity, gas, steam and hot water supply	40	40	3,153	1,311	1,842	503	9,973
Collection, purification and distribution of water	41	52	146	46	100	60	2,137
All industries	1-4	5,535	99,966	39,593	60,373	7,692	258,435
Transportable goods industries	1-3	5,443	96,668	38,237	58,431	7,129	246,326
Manufacturing industries	15-37	5,256	95,598	37,713	57,885	6,913	240,301

Source: CSO

TABLE 10.4

Table 10.5 Volume indices of production for industrial sectors
Base year 2000=100

Industrial sector	NACE code	2000	2001	2002	2003	2004
Mining and quarrying	10-14	100.0	99.7	95.2	115.4	113.5
Food products, beverages and tobacco products	15-16	100.0	106.5	110.7	114.9	120.6
Food products and beverages	15	100.0	106.7	110.9	116.4	123.7
Tobacco products	16	100.0	103.2	106.6	86.4	61.4
Textiles and textile products	17-18	100.0	106.0	72.7	65.6	65.1
Textiles	17	100.0	112.3	85.3	69.6	65.1
Wearing apparel; dressing and dyeing of fur	18	100.0	97.4	55.3	60.1	65.0
Leather and leather products	19	100.0	84.5	84.3	55.5	36.4
Wood and wood products	20	100.0	92.0	103.7	107.5	124.4
Pulp, paper and paper products; publishing, printing and reproduction of recorded media	21-22	100.0	98.6	107.4	119.2	145.5
Manufacture of pulp, paper and paper products	21	100.0	100.6	96.3	89.8	94.5
Publishing, printing and reproduction of recorded media	22	100.0	98.4	108.7	122.8	151.6
Chemicals, chemical products and man-made fibres	24	100.0	122.5	152.7	159.1	144.3
Rubber and plastic products	25	100.0	99.5	90.0	95.8	94.6
Other non-metallic mineral products	26	100.0	101.7	93.8	98.7	99.1
Basic metals and fabricated metal products	27-28	100.0	91.6	90.2	90.5	95.7
Basic metals	27	100.0	89.5	88.1	84.2	79.9
Fabricated metal products, except machinery and equipment	28	100.0	92.2	90.8	92.3	100.3
Machinery and equipment, not elsewhere classified	29	100.0	94.3	94.9	97.9	87.4
Electrical and optical equipment	30-33	100.0	108.6	102.6	109.1	116.2
Office machinery and computers	30	100.0	92.1	75.6	92.7	105.9
Electrical machinery and apparatus, not elsewhere classified	31	100.0	118.5	126.5	128.7	144.3
Radio, television and communication equipment and apparatus	32	100.0	98.0	88.9	76.8	78.2
Medical, precision and optical instruments, watches and clocks	33	100.0	135.3	135.9	165.0	170.2
Transport equipment	34-35	100.0	103.9	90.8	88.6	92.5
Manufacturing not elsewhere classified; recycling; refined petroleum products	36,37,23	100.0	91.8	81.4	72.1	71.9
Manufacturing industries		100.0	110.0	118.4	123.9	124.4
Transportable goods industries		100.0	109.9	118.1	123.8	124.2
<i>of which: Industries mainly or wholly producing</i>						
Capital goods		100.0	107.3	101.0	117.8	126.4
Intermediate products		100.0	111.1	123.0	125.1	117.7
Consumer goods		100.0	108.3	122.2	122.9	132.6
Durable consumer goods		100.0	91.9	84.7	88.9	81.5
Non-durable consumer goods		100.0	110.4	126.9	127.0	138.9
Electricity, gas and water supply	40-41	100.0	109.9	120.2	130.6	139.5
All industries		100.0	109.9	118.2	124.1	125.0
<i>of which: Energy producing industries</i>	10, 11, 12, 23, 40	100.0	102.5	113.9	127.6	134.7

Source: CSO
TABLE 10.5

Table 10.6 Volume indices of production for modern, traditional and all industries

Base year 2000=100

Year	All industries		Modern sector		Traditional sector	
	Index	Annual % change	Index	Annual % change	Index	Annual % change
2000	100.0		100.0		100.0	
2001	109.9	9.9	114.7	14.7	102.3	2.3
2002	118.2	7.6	128.6	12.1	101.7	-0.6
2003	124.1	5.0	136.3	6.0	104.6	2.9
2004	125.0	0.7	135.7	-0.4	107.8	3.1

Source: CSO

TABLE 10.6

Volume indices of production

Base year
2000=100

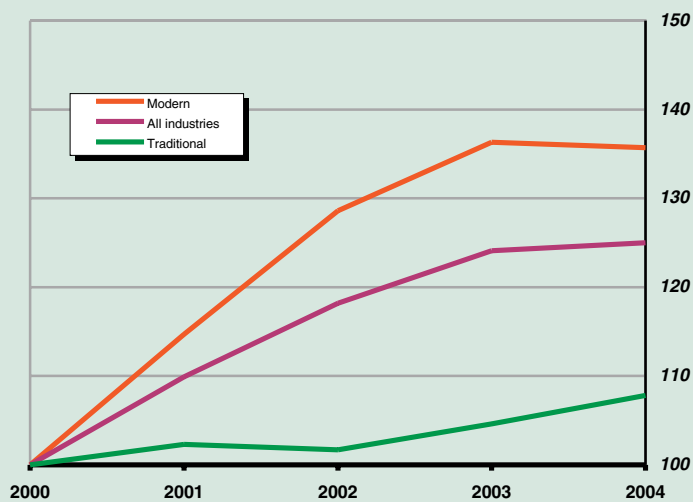


Table 10.7 Total stock changes in industry

€m

Industrial sector	NACE code	Change in 1997	Change in 1998	Change in 1999	Change in 2000	Change in 2001	Change in 2002	Change in 2003	Change in 2004
Mining and quarrying	10-14	0.9	4.4	22.1	19.8	0.3	-14.8	-0.7	22.0
Food products and beverages	15	54.1	53.0	66.0	85.7	107.3	11.8	11.3	-12.9
Tobacco products	16	22.6	-2.3	23.9	35.3	-28.2	44.1	14.8	-19.4
Textiles	17	2.4	1.8	-0.3	3.8	-3.2	-3.1	-7.3	-1.9
Wearing apparel	18	-1.3	13.2	-5.7	0.6	14.1	-3.8	-7.3	-1.1
Leather products	19	-0.5	1.8	-0.5	0.8	3.8	0.6	2.3	-2.5
Wood and wood products	20	0.4	7.4	-0.8	19.3	-4.0	-3.6	11.0	31.2
Paper and paper products	21	8.6	2.5	3.2	5.5	1.6	2.2	3.5	-2.9
Publishing and printing	22	2.2	11.8	8.9	-11.7	2.2	43.3	1.1	-48.5
Chemical products	24	61.1	218.1	451.6	365.1	199.6	210.9	475.9	25.7
Rubber and plastic products	25	1.7	4.7	12.7	23.6	2.5	-10.8	9.1	10.6
Other non-metallic mineral products	26	15.1	3.6	8.0	29.7	1.7	-11.0	-3.7	9.8
Basic metals	27	0.4	-2.4	5.3	7.0	10.6	-8.6	2.6	0.3
Fabricated metals excluding machinery	28	14.4	6.5	-5.3	12.7	8.4	45.5	-36.5	29.9
Machinery not elsewhere classified	29	-5.0	14.0	0.3	17.0	-15.8	-14.5	-13.2	29.0
Office machinery and computers	30	109.3	26.4	218.0	217.1	78.4	-296.7	39.8	-39.0
Other electrical equipment	31	18.0	20.3	33.4	81.8	-86.2	-15.5	-2.8	61.6
Communication equipment	32	41.5	41.7	33.9	220.7	-157.4	23.0	-16.5	125.3
Medical and optical instruments	33	59.3	65.7	7.4	40.0	-10.1	-21.1	43.2	-78.0
Motor vehicles	34	0.8	2.2	4.1	23.0	7.8	-18.2	22.4	22.9
Other transport equipment	35	17.5	10.2	14.1	14.9	1.9	-26.8	-21.0	-3.2
Other manufacturing	36-37, 23	13.7	38.4	-15.5	120.0	-102.1	-8.8	-80.8	7.6
Electricity and gas supply	40	86.3	81.8	79.6	-103.7	93.6	14.6	2.4	0.4
All industries	10-40	523.3	624.3	964.6	1,227.5	126.8	-61.3	449.6	166.9
Transportable goods industries	10-37	436.9	542.7	884.9	1,331.2	33.2	-75.9	447.2	166.5
Manufacturing industries	15-37	436.0	538.1	862.9	1,311.4	32.9	-61.1	447.9	144.5

Source: CSO

Total stock changes in all industries

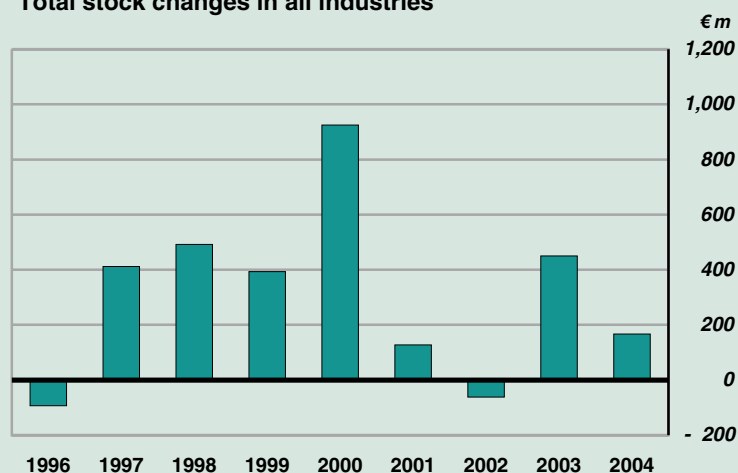


Table 10.8 Total capital acquisitions in industry

€m

Industrial sector	NACE code	1997	1998	1999	2000	2001	2002	2003	2004
Mining and quarrying	10-14	35.8	144.2	233.8	165.8	198.8	241.8	167.2	119.0
Food products and beverages	15	328.0	411.0	797.3	547.2	541.9	515.3	465.2	490.7
Tobacco products	16	6.5	9.5	7.9	16.9	17.7	13.8	10.5	9.0
Textiles	17	20.2	24.3	22.4	45.4	32.6	14.3	9.2	4.6
Wearing apparel	18	11.6	10.0	12.8	10.0	7.9	6.0	4.2	5.9
Leather products	19	1.9	1.5	1.3	3.4	4.9	3.9	1.9	0.6
Wood and wood products	20	18.3	40.5	36.4	45.9	60.4	58.6	35.5	24.7
Paper and paper products	21	31.0	30.7	38.1	51.3	45.6	32.4	17.0	24.3
Publishing and printing	22	132.7	113.6	136.4	200.8	216.9	134.0	98.5	72.6
Chemical products	24	570.8	843.5	1,017.1	913.4	788.3	944.9	656.7	719.1
Rubber and plastic products	25	58.5	69.3	71.9	88.9	77.7	60.5	51.0	45.9
Other non-metallic mineral products	26	108.1	85.1	99.9	171.1	107.2	115.0	128.3	128.0
Basic metals	27	38.2	27.8	23.2	26.9	21.1	21.4	20.0	12.4
Fabricated metals excluding machinery	28	38.5	46.2	40.8	64.1	72.6	43.0	33.1	33.2
Machinery not elsewhere classified	29	70.2	66.0	85.1	97.9	85.9	43.6	40.2	58.8
Office machinery and computers	30	343.1	348.7	409.2	355.5	290.8	188.0	146.9	125.1
Other electrical equipment	31	103.1	104.0	113.4	173.8	84.2	57.5	46.9	72.5
Communication equipment	32	83.0	682.1	561.5	328.7	722.0	694.2	174.0	905.2
Medical and optical instruments	33	103.0	155.3	107.3	150.5	186.5	241.4	180.4	235.9
Motor vehicles	34	81.0	49.3	18.4	33.5	34.6	22.1	21.0	32.1
Other transport equipment	35	12.6	22.0	33.9	17.3	17.6	33.5	8.9	41.3
Other manufacturing	36-37, 23	49.3	60.2	57.1	92.8	49.5	64.4	100.4	126.6
Electricity and gas supply	40	299.3	413.0	520.6	522.9	815.3	1,268.9	1,129.0	1,183.9
All industries	10-40	2,565.6	3,758.2	4,443.6	4,178.2	4,479.6	4,818.5	3,546.0	4,471.4
Transportable goods industries	10-37	2,266.4	3,345.1	3,923.0	3,655.1	3,664.3	3,549.6	2,417.0	3,287.5
Manufacturing industries	15-37	2,230.4	3,200.9	3,689.4	2,489.3	3,465.6	3,307.8	2,249.8	3,168.5

TABLE 10.8

Source: CSO

Total capital acquisitions in all industries

