

12

Industry

- Industrial sector turnover increased by 66% between 1998 and 2004.
- Gross value added for industrial enterprises increased by 70% between 1998 and 2004.
- In 2004 there were almost 4,700 industrial enterprises employing almost 236,000 people, with a total turnover of €113bn.
- In 2004 55% of the total turnover of industrial enterprises was accounted for by those employing over 500 people, up from 34% in 1998.
- The greatest increase in the volume of industrial production (with price changes eliminated) between 2000 and 2006 occurred in the medical, precision and optical instruments, watches and clocks sector (90%).

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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 18.

The information is broken down by sector using the standard EU-wide NACE Rev.1.1 classification for 2004 CIP data.

Tables 12.1 to 12.3 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 12.1 shows the main trading aggregates for industrial enterprises over the past seven years.

Table 12.2 provides a sectoral breakdown of some of those aggregates for the most recent year.

Table 12.4 shows information by sector on the trend in the volume of production in industry over the most recent full six 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 12.5 shows annual volume indices of production divided between the 'Modern' and 'Traditional' (All Other) sectors over the most recent full six years.

Tables 12.6 and 12.7 show the changes in stocks and capital acquisitions in the industrial sector from the Quarterly Accounts Inquiry to Industry survey. This survey covers industrial firms with 20 or more persons engaged.

The results

From table 12.1 for the 7 year period 1998 to 2004 there has been a marked increase in turnover of 66%. This increase is reflected in increased exports. Table 12.2 shows that, in terms of turnover value, the chemicals, electrical (including computers) and optical equipment, and food products, beverages and tobacco sectors predominate. In 2004 they accounted for approximately 26%, 24% and 21% of total turnover respectively. These sectors between them accounted for 52% of total industrial employment.

Table 12.4 shows that in volume terms (ie eliminating price changes) the volume of industrial production increased by 34% between 2001 and 2006. For particular sectors the volume increase was much greater, volume increased by 90% in the Medical, precision optical instruments, watches and clocks sector and volume in the Publishing, printing and reproduction of recorded media increased by 89%. There was a fall of about 83% in the leather industry.

Looking at the categorisation of production by main use, the production of intermediate products showed a 20% increase and capital goods was up by 38%. The increase in the volume of consumer goods was 54%. Table 12.5 compares the situation in Modern and Traditional sectors. The Modern sector comprises a number of high-technology and chemical sectors. There has been a 51% increase in production in the Modern sector between 2000 and 2006. This contrasts with growth of about 7% in the Traditional sectors.

Table 12.6 shows that the value of stocks held in all industries increased by €964.9m in the year 2006. The highest increase of over €499m was recorded in NACE 24 (chemical products) compared to 2005. Other sectors to show significant increases in stocks include NACE 32 (communication equipment) and NACE 22 (publishing and printing). There were decreases in stock levels in NACE 40 (electricity and gas supply), NACE 10-14 (mining and quarrying) as well as NACE 36-37,23 (other manufacturing).

From table 12.7 the total capital acquisition figures show expenditure of €4,515m in the year 2006. The acquisitions are widely spread across the industrial sectors with the highest capital acquisition of €1,095m occurring in NACE 40 (electricity and gas supply). Other sectors to show significant capital acquisitions include NACE 24 (chemical products) with €901m, NACE 32 (communications equipment) with €630m and NACE 15-16 (food products, beverages and tobacco products) with €473m.

Technical Notes

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.

Modern sector

The 'Modern' sector includes the following industrial sectors:

NACE 223 Reproduction of recorded media
NACE 24 Chemicals (incl man-made fibres)
NACE 30,33 Computers and instrument engineering
NACE 31,32 Electrical machinery and equipment

Industry

Table 12.1 Main aggregates for enterprises in all industries

	Unit	1998	1999	2000	2001	2002	2003	2004
Number of enterprises	No.	4,491	4,599	4,873	4,870	4,996	4,995	4,684
Persons engaged	No.	257,729	263,056	268,634	264,198	253,842	244,237	235,489
Males	No.	172,787	177,548	181,815	179,527	174,170	168,662	162,406
Females	No.	84,942	85,508	86,819	84,671	79,672	75,523	73,083
Turnover	€m	68,144	82,864	100,296	105,720	107,683	109,807	113,311
<i>of which exports</i>		47,808	60,257	74,165	79,317	81,530	83,306	86,573
Purchases	€m	45,605	54,153	66,451	70,759	68,558	70,227	74,614
Material and fuels	€m	26,678	30,559	37,355	38,579	36,141	34,356	35,327
Services and goods for factoring	€m	18,927	23,594	29,097	31,681	32,417	35,854	39,287
Gross value added	€m	23,517	30,060	33,883	35,713	39,526	40,701	40,041
Labour costs	€m	7,061	7,599	8,282	8,929	9,157	9,468	9,526
Wages and salaries	€m	5,908	6,356	6,935	7,367	7,567	7,726	7,767
Other labour costs	€m	1,152	1,244	1,362	1,562	1,590	1,742	1,759
Stocks at end of year	€m	5,840	6,843	8,328	8,510	7,821	7,966	7,828
Increase during year	€m	637	992	1,229	66	12	391	343
Additions to capital assets during year	€m	4,054	4,614	4,184	4,691	5,143	3,675	4,883

Source: CSO

Persons engaged in all industries

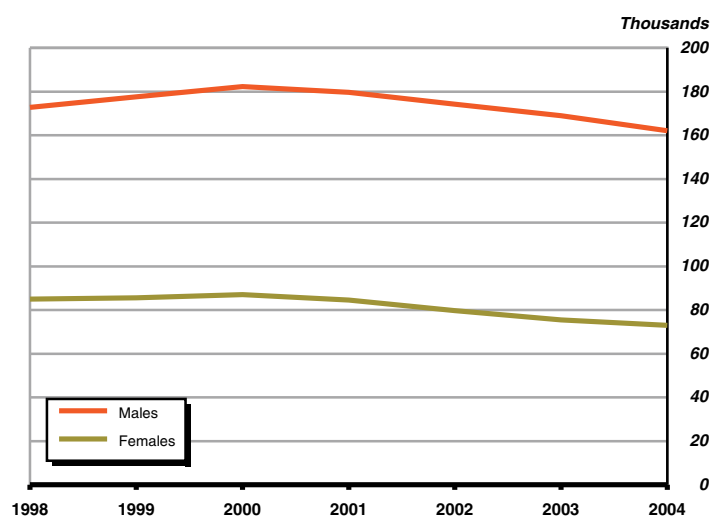


Table 12.2 Main aggregates for enterprises in each industrial sector, 2004

	NACE code	Number of Enterprises	Turnover	Gross value added	Labour costs	Number of Persons engaged
			€m	€m	€m	€m
Mining and quarrying	10-14	96	1,360	513	286	5,837
Manufacture of food products, beverages and tobacco	15-16	605	23,674	8,112	1,827	45,555
Textiles and textile products	17-18	232	634	228	150	5,565
Textiles	17	144	346	126	87	3,160
Wearing apparel; dressing and dyeing of fur	18	88	287	102	63	2,405
Leather and leather products	19	19	46	12	11	381
Wood and wood products	20	291	1,086	388	191	6,396
Pulp, paper and paper products; publishing and printing	21-22	618	15,046	4,612	876	20,191
Manufacture of pulp, paper and paper products	21	100	789	314	169	3,945
Publishing, printing and reproduction of recorded media	22	518	14,257	4,297	707	16,246
Chemicals, chemical products and man-made fibres	24	193	29,398	12,523	1,217	24,136
Rubber and plastic products	25	276	1,382	545	319	9,766
Other non-metallic mineral products	26	297	2,066	784	405	10,784
Basic metals and fabricated metal products	27-28	668	2,044	790	503	15,174
Basic metals	27	85	417	138	79	2,104
Fabricated metal products, except machinery and equipment	28	583	1,627	652	424	13,070
Machinery and equipment, not elsewhere classified	29	301	1,856	691	421	11,751
Electrical and optical equipment	30-33	366	27,640	6,894	2,032	52,765
Manufacture of office machinery and computers	30	50	15,971	1,518	602	14,127
Manufacture of electrical machinery and apparatus not elsewhere classified	31	156	3,336	1,691	325	9,097
Manufacture of radio, television and communication equipment and apparatus	32	40	2,824	1,556	326	7,783
Medical, precision and optical instruments, watches and clocks	33	120	5,509	2,128	780	21,758
Transport equipment	34-35	104	995	419	292	7,359
Manufacture of motor vehicles, trailers and semi-trailers	34	61	570	199	100	3,213
Manufacture of other transport equipment	35	43	426	220	191	4,146
Manufacturing nec; recycling; manufacture of coke, refined petroleum products and nuclear fuel	36-37, 23	549	2,377	732	321	10,076
Petroleum products and nuclear fuel	36, 23	518	2,255	690	310	9,701
Recycling	37	31	122	41	11	375
Electricity, gas, steam and hot water supply	40	69	3,708	2,797	676	9,753
All industries	1-4	4,684	113,311	40,041	9,526	235,489
Transportable goods industries	1-3	4,615	109,603	37,244	8,850	225,736
Manufacturing industries	15-37	4,519	108,243	36,730	8,565	219,899

Source: CSO

Industry

Table 12.3 Main aggregates for industrial local units by county, 2004

Region, county or city	No. of units	Total engaged	Total labour costs	Gross output	Industrial inputs
Border					
Cavan	89	3,872	104,448	1,092,051	848,379
Donegal	190	5,912	128,647	699,335	389,078
Leitrim	34	970	24,278	150,156	68,662
Louth	176	7,097	206,834	3,635,401	823,262
Monaghan	122	4,668	117,530	898,678	604,935
Sligo	78	4,051	104,428	616,094	350,934
Midland					
Laois	80	1,641	42,921	301,009	192,634
Longford	52	2,135	57,601	478,322	318,901
Offaly	92	4,879	144,163	613,756	310,975
Westmeath	106	3,494	101,587	545,593	271,980
West					
Galway	270	15,156	417,855	2,640,361	1,376,198
Mayo	150	6,315	183,483	2,495,054	431,442
Roscommon	66	2,576	77,863	486,874	350,848
Dublin					
Dublin	680	23,302	821,704	5,641,486	2,263,393
Dun Laoghaire-Rathdown	106	4,573	186,704	10,201,999	655,766
Fingal	174	12,616	438,277	7,386,899	3,339,524
South Dublin	245	9,906	333,386	2,365,163	971,699
Mid-East					
Kildare	185	14,130	526,670	5,579,399	1,950,129
Meath	181	5,869	177,570	1,056,551	615,571
Wicklow	172	6,857	211,935	1,356,144	631,371
Mid-West					
Clare	168	7,653	257,448	1,892,466	580,414
Limerick	215	14,844	518,478	12,211,822	8,069,646
Tipperary North Riding	87	4,256	130,903	766,226	517,688
South-East					
Carlow	76	3,057	96,124	486,342	274,018
Kilkenny	115	2,756	87,841	781,705	559,622
Tipperary South Riding	90	4,808	169,760	4,988,598	1,764,882
Waterford	164	11,138	333,933	1,857,770	867,065
Wexford	189	5,319	131,626	1,077,537	536,842
South-West					
Cork	626	32,411	1,129,813	27,047,511	6,304,983
Kerry	140	4,791	144,940	1,091,910	500,786
Non-Attributable	24	8,490	496,534	3,330,114	809,674
All industries	5,142	239,544	7,905,284	103,772,328	37,551,299

Source: CSO

Table 12.4 Volume indices of production for industrial sectors

Base year 2000=100

Industrial sector	NACE code	2001	2002	2003	2004	2005	2006
Mining and quarrying	10-14	99.7	95.2	115.4	113.5	112.8	123.3
Food products and beverages	15	106.7	110.9	116.4	123.7	126.1	127.7
Beverages and tobacco products	159,16	103.2	106.6	86.4	61.4	49.1	112.9
Textiles and textile products	17-18	106.0	72.7	65.6	65.1	56.0	46.0
Textiles	17	112.3	85.3	69.6	65.1	55.1	53.1
Wearing apparel; dressing and dyeing of fur	18	97.4	55.3	60.1	65.0	57.2	36.4
Leather and leather products	19	84.5	84.3	55.5	36.4	19.4	16.8
Wood and wood products	20	92.0	103.7	107.5	124.4	134.4	149.5
Pulp, paper and paper products; publishing, printing and reproduction of recorded media	21-22	98.6	107.4	119.2	145.5	158.1	178.2
Manufacture of pulp, paper and paper products	21	100.6	96.3	89.8	94.5	85.9	87.3
Publishing, printing and reproduction of recorded media	22	98.4	108.7	122.8	151.6	166.8	189.1
Chemicals, chemical products and man-made fibres	24	122.5	152.7	159.1	144.3	145.1	150.5
Rubber and plastic products	25	99.5	90.0	95.8	94.6	89.4	91.2
Other non-metallic mineral products	26	101.7	93.8	98.7	99.1	96.1	99.6
Basic metals and fabricated metal products	27-28	91.6	90.2	90.5	95.7	94.4	95.2
Basic metals	27	89.5	88.1	84.2	79.9	91.3	95.3
Fabricated metal products, except machinery and equipment	28	92.2	90.8	92.3	100.3	95.3	95.2
Machinery and equipment, not elsewhere classified	29	94.3	94.9	97.9	87.4	82.6	91.4
Electrical and optical equipment	30-33	108.6	102.6	109.1	116.2	125.2	134.8
Office machinery and computers	30	92.1	75.6	92.7	105.9	113.5	121.6
Electrical machinery and apparatus, not elsewhere classified	31	118.5	126.5	128.7	144.3	153.6	175.8
Radio, television and communication equipment and apparatus	32	98.0	88.9	76.8	78.2	80.6	92.8
Medical, precision and optical instruments, watches and clocks	33	135.3	135.9	165.0	170.2	190.8	189.9
Transport equipment	34-35	103.9	90.8	88.6	92.5	91.8	92.0
Manufacturing not elsewhere classified; recycling; refined petroleum products	36,37,23	91.8	81.4	72.1	71.9	75.8	78.6
Manufacturing industries		110.0	118.4	123.9	124.4	128.2	134.9
Transportable goods industries		109.9	118.1	123.8	124.2	128.0	134.8
<i>of which: Industries mainly or wholly producing</i>							
Capital goods		107.3	101.0	117.8	126.4	135.1	138.1
Intermediate products		111.1	123.0	125.1	117.7	119.1	120.1
Consumer goods		108.3	122.2	122.9	132.6	136.8	153.7
Durable consumer goods		91.9	84.7	88.9	81.5	88.8	122.0
Non-durable consumer goods		110.4	126.9	127.0	138.9	142.6	157.5
Electricity, gas and water supply	40-41	106.5	110.0	113.2	117.8	119.7	120.5
All industries		109.7	117.7	123.3	123.9	127.6	134.0
<i>of which: Energy producing industries</i>	10, 11, 12, 23, 40	99.4	104.6	111.5	115.5	117.3	119.7

Source: CSO

Industry

Table 12.5 Volume indices of production for modern, traditional and all industries

Base year 2000=100

Year	Modern sector		Traditional sector (All other sectors)		All industries	
	Index	Annual % change	Index	Annual % change	Index	Annual % change
2000	100.0		100.0		100.0	
2001	114.7	14.7%	101.8	1.8%	109.7	9.7%
2002	128.6	12.1%	100.3	-1.5%	117.7	7.3%
2003	136.3	6.0%	102.3	2.0%	123.3	4.8%
2004	135.7	-0.4%	105.0	2.6%	123.9	0.5%
2005	141.5	4.3%	105.4	0.4%	127.6	3.0%
2006	151.0	6.7%	107.0	1.5%	134.0	5.0%

Source: CSO

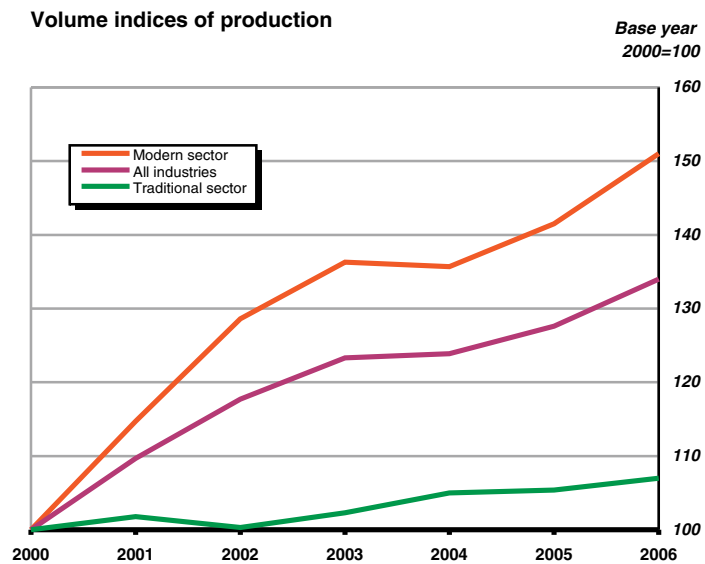
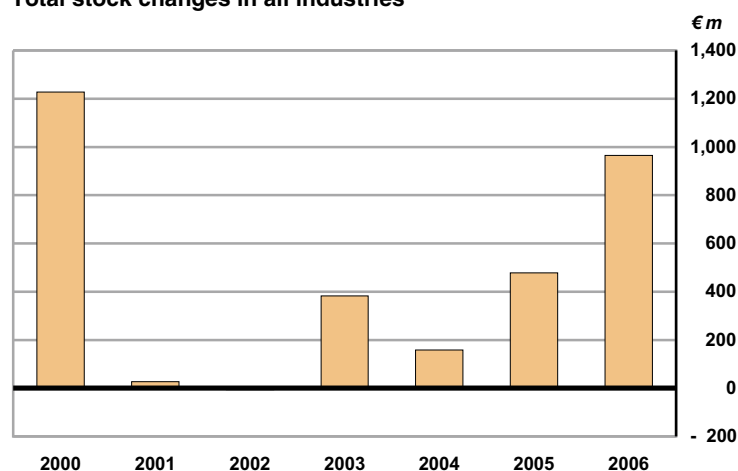


Table 12.6 Total stock changes in industry

€m								
Industrial sector	NACE code	Change in 2000	Change in 2001	Change in 2002	Change in 2003	Change in 2004	Change in 2005	Change in 2006
Mining and Quarrying	10-14	19.8	3.3	-9.4	9.4	15.1	24.0	-66.3
Food products, beverages and tobacco	15-16	121.0	63.9	33.6	54.4	-22.1	84.8	-37.2
Textiles	17	3.8	6.0	-2.7	-10.9	-2.3	1.4	2.5
Wearing apparel	18	0.6	10.2	-5.5	-5.2	0.5	-4.2	45.2
Leather products	19	0.8	2.6	-2.5	0.5	1.1	1.0	0.4
Wood and wood products	20	19.3	-8.3	-1.4	15.2	31.0	22.0	-1.8
Paper and paper products	21	5.5	1.9	0.6	3.8	-2.8	0.0	8.8
Publishing and printing	22	-11.7	-20.6	87.4	-44.2	-49.0	95.9	120.4
Chemical products	24	365.1	250.8	115.8	296.0	2.1	-45.2	499.3
Rubber and plastic products	25	23.6	-2.4	0.9	-1.7	5.9	13.0	9.3
Other non-metallic mineral products	26	29.7	5.5	-7.7	4.6	10.1	14.9	32.7
Basic metals	27	7.0	17.0	-4.9	1.9	3.5	35.2	27.0
Fabricated metals (excl machinery)	28	12.7	1.4	0.5	4.1	40.5	6.1	36.7
Machinery not elsewhere classified	29	17.0	-0.2	-4.5	-11.0	27.9	20.7	44.4
Office machinery and computers	30	217.1	-195.2	4.2	-57.7	-35.0	143.6	92.3
Other electrical equipment	31	81.8	-30.9	20.1	-16.8	59.6	4.4	20.4
Communication equipment	32	220.7	-45.2	-154.2	-74.8	124.5	-5.2	202.6
Medical and optical instruments	33	40.0	-14.6	4.2	235.5	-77.0	22.5	48.9
Motor vehicles	34	23.0	-2.4	-7.8	12.3	21.2	5.8	-10.2
Other transport equipment	35	14.9	-16.3	-23.7	-11.7	-3.1	9.3	23.0
Other manufacturing	36-37,23	120.0	-93.0	-46.5	-24.5	5.8	7.7	-51.0
Electricity and gas supply	40	-103.7	93.2	-2.8	3.6	0.4	20.4	-82.5
All industries	10-40	1,227.5	26.9	-6.3	382.8	157.9	478.1	964.9
Transportable goods industries	10-37	1,331.2	-66.4	-3.5	379.2	157.5	457.6	1,047.4
Manufacturing industries	15-37	1,311.4	-69.7	5.9	369.8	142.4	433.6	1,113.8

Source: CSO

Total stock changes in all industries



Industry

Table 12.7 Total capital acquisitions in industry

€m

Industrial sector	NACE code	2000	2001	2002	2003	2004	2005	2006
Mining and Quarrying	10-14	165.8	187.7	185.7	149.8	120.3	156.0	214.3
Food products, beverages and tobacco	15-16	564.1	492.8	489.1	488.9	501.9	477.5	473.2
Textiles	17	45.5	33.1	12.0	10.7	5.2	22.3	7.2
Wearing apparel	18	10.0	5.3	3.1	4.9	6.0	5.2	4.4
Leather products	19	3.4	9.1	2.8	1.7	0.6	0.3	0.3
Wood and wood products	20	45.9	58.5	58.9	37.0	22.5	25.2	27.2
Paper and paper products	21	51.3	48.2	36.4	25.0	24.5	24.7	41.0
Publishing and printing	22	200.8	233	158.0	105.9	71.9	92.9	113.0
Chemical products	24	913.4	868.2	1,456.4	856.5	763.9	792.5	900.6
Rubber and plastic products	25	88.9	85.5	52.2	49.0	50.2	64.8	82.5
Other non-metallic mineral products	26	171.1	171	98.4	112.5	127.6	135.6	162.6
Basic metals	27	26.9	19.9	20.4	20.9	12.4	63.9	149.2
Fabricated metals (excl machinery)	28	64.1	100.5	56.1	48.9	33.5	43.1	47.0
Machinery not elsewhere classified	29	97.9	79.1	45.3	50.7	58.9	54.8	80.5
Office machinery and computers	30	355.5	151.1	193.1	148.9	123.8	123.4	71.8
Other electrical equipment	31	173.8	234.7	99.1	83.2	72.8	62.1	59.1
Communication equipment	32	382.7	1,161.4	726.7	146.9	905.1	1,353.6	629.9
Medical and optical instruments	33	150.5	252.5	259.0	185.4	235.2	287.9	243.2
Motor vehicles	34	33.5	29.5	30.4	29.0	31.7	22.0	23.4
Other transport equipment	35	17.3	50.8	34.5	18.0	41.3	55.7	32.7
Other manufacturing	36-37, 23	92.8	66.5	71.3	75.6	126.8	56.3	56.9
Electricity and gas supply	40	522.9	451.2	1,045.7	1,017.3	1,183.9	990.0	1,095.4
All industries	10-40	4,178.2	4,789.2	5,134.6	3,666.7	4,520.0	4,909.8	4,515.1
Transportable goods industries	10-37	3,655.1	4,338.1	4,088.9	2,649.4	3,336.1	3,919.8	3,419.7
Manufacturing industries	15-37	3,489.3	4,150.4	3,903.2	2,499.6	3,215.8	3,763.8	3,205.5

Source: CSO

Total capital acquisitions in all industries

