

11

Industry

- Industrial sector turnover for enterprises decreased by 6% between 2008 and 2009.
- In 2009 there were 5,029 industrial enterprises employing just over 195,500 people, with a total turnover of just under €110bn.
- The number of persons engaged in all industries dropped by 9.5% between 2008 and 2009.
- The greatest increase in the volume of industrial production (with price changes eliminated) between 2006 and 2010 occurred in Chemical, chemical products and man-made fibres (43.8%).

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Introduction

This chapter contains information on the industrial sector. The data is drawn from the annual Census of Industrial Production (CIP) and the various short-term industrial releases of the CSO. The information is broken down by sector using the standard EU-wide NACE classification. Up to December 2007 NACE Rev. 1.1 was recognised by the Central Statistics Office as the official CSO Standard Classification and on January 1st 2008 this was replaced by NACE Rev. 2. Please refer to individual tables for relevant NACE for each survey. Further information on classifications in the CSO can be found at <http://www.cso.ie/surveysandmethodologies/classifications>.

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. 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.

Table 11.1 shows the main trading aggregates for industrial enterprises over the period 2001 – 2007 using NACE Rev. 1.1 classification.

Table 11.1a shows the main trading aggregates for industrial enterprises over the period 2008 – 2009 using NACE Rev.2 classification.

Tables 11.2 and 11.2a provide the main aggregates for enterprises by industrial sector for 2008 and 2009.

Tables 11.3 and 11.3a provide main aggregates for local units by county for 2008 and 2009.

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, salaries and on employment in industry are tracked on a short-term basis by a CSO inquiry – see Chapter 17.

Table 11.4 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 (for certain sectors the threshold is lowered) and 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 11.5 shows annual volume indices of production broken down by the 'Modern' and 'Traditional' (All Other) sectors since 2006.

Table 11.6 shows 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

Table 11.1a shows that there has been a decrease in turnover of 6% between 2008 and 2009. Table 11.2a shows that, in terms of turnover value, the sectors covering pharmaceuticals, food products & beverages, and electrical & optical equipment predominate. In 2009 they accounted for approximately 34%, 20% and 17% of total turnover respectively. These sectors between them accounted for 39% of total industrial employment.

Table 11.4 shows that in volume terms (i.e. eliminating price changes) the volume of industrial production increased by 5.6% between 2006 and 2010. There was an increase in Chemicals, chemical products and man-made fibres of 43.8%. However, there were large volume decreases in certain sectors including the Manufacture of pulp, paper and paper products (-32.2%) and Computer, electronic and optical products (- 44.6%).

Table 11.5 compares the situation in the 'Modern' and 'Traditional' (All Other) sectors. The 'Modern' sector comprises a number of high-technology and chemical sectors.

Table 11.6 shows that the value of stocks held in all industries increased by €2.6m in the year 2010. The largest increase of €71m was recorded in NACE 20 (Chemicals and chemical Products), closely followed by NACE 10 (Food products) with an increase of €58.5m.

From Table 11.6 the total capital acquisition figures show expenditure of €2,269m in the year 2010. The acquisitions are widely spread across the industrial sectors with the highest capital acquisition of €883m occurring in NACE 35 (Electricity and gas supply). Other sectors to show significant capital acquisitions include NACE 21 (Basic pharmaceutical products and preparations) with €354m and NACE 10 (Food products) with €194m.

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.

Industry

Table 11.1 Main aggregates for enterprises in all industries (NACE Rev. 1.1)

	Unit	2001	2002	2003	2004	2005	2006	2007
Number of enterprises	No.	4,870	4,996	4,995	4,684	4,418	4,620	5,558
Persons engaged	No.	264,198	253,842	244,237	235,489	230,984	233,298	238,584
Males	No.	179,572	174,182	168,672	162,406	160,461	163,234	168,158
Females	No.	84,647	79,692	75,565	73,083	70,523	70,064	70,426
Turnover	€m	105,720	107,766	109,308	112,373	119,428	125,270	133,427
<i>of which exports</i>		<i>79,317</i>	<i>81,530</i>	<i>83,306</i>	<i>86,552</i>	<i>91,587</i>	<i>93,735</i>	<i>98,422</i>
Purchases	€m	70,259	68,372	67,827	70,545	81,758	87,872	93,624
Material and fuels	€m	38,579	36,462	34,786	35,460	38,885	42,843	45,660
Services and goods for factoring	€m	31,680	31,864	37,108	39,195	42,873	45,029	47,964
Gross value added	€m	35,713	39,841	38,518	39,062	38,835	39,658	41,381
Labour costs	€m	8,929	9,185	9,501	9,607	9,981	10,651	11,289
Wages and salaries	€m	7,367	7,595	7,760	7,848	8,171	8,705	9,354
Other labour costs	€m	1,562	1,590	1,742	1,759	1,811	1,946	1,935
Stocks at end of year	€m	7,891	7,821	7,966	7,823	8,132	8,949	9,675
Increase during year	€m	-35	12	391	344	318	1,085	830
Additions to capital assets during year	€m	4,691	5,143	3,675	4,877	5,553	5,138	4,643

Source: CSO

Table 11.1a Main aggregates for enterprises in all industries (NACE Rev. 2)

	Unit	2008	2009
Number of enterprises	No.	5,589	5,029
Persons engaged	No.	216,156	195,542
Males	No.	153,196	137,533
Females	No.	62,960	58,009
Turnover	€m	116,350	109,736
<i>of which exports</i>		<i>81,055</i>	<i>57,699</i>
Purchases	€m	81,570	76,152
Material and fuels	€m	42,523	36,354
Services and goods for factoring	€m	39,047	39,798
Gross value added	€m	35,875	33,670
Labour costs	€m	10,835	10,159
Wages and salaries	€m	8,856	8,109
Other labour costs	€m	1,979	2,050
Stocks at end of year	€m	9,290	8,659
Changes during year	€m	+178	-688
Changes to capital assets during year	€m	+4,464	+5,537

Source: CSO

Industry

Table 11.2 Main aggregates for enterprises in each industrial sector, 2008 (NACE Rev.2)

Industrial sector	NACE code	Number of enterprises	Turnover		Labour costs		Number of persons engaged
			€m	€m	€m	€m	
Mining and quarrying	5-9	179	1,719	581	381	6,235	
Manufacture of food products and beverages	10-11	642	23,968	5,948	1,851	39,955	
Food products	10	608	21,018	4,892	1,516	35,692	
Beverages	11	34	2,950	1,055	335	4,263	
Textiles and textile products	13-14	221	420	147	115	3,808	
Textiles	13	144	277	98	73	2,340	
Wearing apparel	14	77	143	49	42	1,468	
Leather and related products	15	16	25	0	4	175	
Wood and wood products, except furniture	16	314	1,005	263	206	5,832	
Pulp, paper and paper products; publishing and printing	17-18	478	2,424	692	436	9,661	
Paper and paper products	17	123	571	190	160	3,357	
Printing and reproduction of recorded media	18	355	1,853	502	276	6,304	
Chemicals and chemical products	20	132	7,161	3,085	583	9,035	
Basic pharmaceutical products and preparations	21	61	27,697	9,779	1,008	14,621	
Rubber and plastic products	22	267	1,477	451	335	8,868	
Other non-metallic mineral products	23	401	2,507	853	462	10,062	
Basic metals and fabricated metal products	24-25	894	2,971	897	680	16,057	
Basic metals	24	148	837	141	136	2,792	
Fabricated metal products, except machinery and equipment	25	746	2,134	756	544	13,265	
Electrical and optical equipment	26-27	252	22,862	4,653	1,420	27,862	
Computer, electronic and optical products	26	125	21,775	4,335	1,190	22,527	
Electrical equipment	27	127	1,087	318	230	5,335	
Machinery and equipment n.e.c.	28	339	2,701	1,098	501	11,663	
Transport equipment	29-30	92	1,140	356	304	5,991	
Motor vehicles, trailers and semi-trailers	29	58	646	128	122	3,020	
Other transport equipment	30	34	493	229	183	2,971	
Tobacco; coke and refined petroleum products; furniture	12,19,31	508	3,328	801	240	6,561	
Other manufacturing	32	201	6,083	2,628	1,038	22,414	
Repair and installation of machinery and equipment	33	171	371	166	119	2,639	
Electricity, gas, steam and air conditioning supply	35	139	6,772	2,918	892	9,258	
Water supply; sewerage, waste management and remediation activities	36 to 39	282	1,719	558	259	5,459	
Water collection, treatment and supply	36	11	22	7	2	56	
Sewerage	37	54	202	79	33	655	
Waste collection, treatment and disposal activities; materials recovery	38	211	1,471	466	221	4,665	
Remediation activities and other waste management services	39	6	24	7	3	83	
All industries	5-39	5,589	116,350	35,875	10,835	216,156	
Transportable goods industries	5-33	5,168	107,859	32,399	9,684	201,439	
Manufacturing industries	10-33	4,989	106,139	31,818	9,303	195,204	

Source: CSO

Table 11.2a Main aggregates for enterprises in each industrial sector, 2009 (NACE Rev.2)

Industrial sector	NACE code	Number of enterprises	Turnover		Labour costs	Number of persons engaged
			€m	€m		
Mining and quarrying	5-9	172	1,405	474	386	5,903
Manufacture of food products and beverages	10-11	594	22,236	5,539	1,693	37,646
Food products	10	567	19,638	4,581	1,380	33,741
Beverages	11	27	2,598	959	313	3,905
Textiles and textile products	13-14	193	385	134	110	3,620
Textiles	13	127	260	93	75	2,496
Wearing apparel	14	66	125	41	35	1,124
Leather and related products	15	14	23	7	4	150
Wood and wood products, except furniture	16	280	691	22	147	4,613
Pulp, paper and paper products; publishing and printing	17-18	441	2,170	610	439	8,784
Paper and paper products	17	110	436	144	138	2,802
Printing and reproduction of recorded media	18	331	1,734	465	301	5,982
Chemicals and chemical products	20	114	2,647	752	353	6,329
Basic pharmaceutical products and preparations	21	66	37,060	13,103	1,285	16,578
Rubber and plastic products	22	239	1,273	387	317	8,217
Other non-metallic mineral products	23	357	1,713	512	360	7,912
Basic metals and fabricated metal products	24-25	773	1,937	562	556	13,232
Basic metals	24	130	445	29	106	2,192
Fabricated metal products, except machinery and equipment	25	643	1,492	533	450	11,040
Electrical and optical equipment	26-27	224	18,280	3,075	1,229	21,847
Computer, electronic and optical products	26	111	17,630	2,849	1,059	17,760
Electrical equipment	27	113	650	226	169	4,087
Machinery and equipment n.e.c.	28	313	2,365	824	448	10,454
Transport equipment	29-30	76	915	343	232	4,739
Motor vehicles, trailers and semi-trailers	29	48	554	158	105	2,577
Other transport equipment	30	28	361	185	127	2,162
Tobacco; coke and refined petroleum products; furniture	12,19,31	436	2,251	749	179	5,246
Other manufacturing	32	185	6,194	2,845	1,031	22,426
Repair and installation of machinery and equipment	33	144	322	154	123	2,422
Electricity, gas, steam and air conditioning supply	35	147	6,464	3,107	989	9,354
Water supply; sewerage, waste management and remediation activities	36 to 39	261	1,403	473	279	6,070
Water collection, treatment and supply	36	11	64	13	12	159
Sewerage	37	49	190	60	34	680
Waste collection, treatment and disposal activities; materials recovery	38	197	1,142	396	232	5,161
Remediation activities and other waste management services	39	4	7	4	1	70
All industries	5-39	5,029	109,736	33,670	10,159	195,542
Transportable goods industries	5-33	4,621	101,869	30,091	8,891	180,118
Manufacturing industries	10-33	4,449	100,464	29,617	8,505	174,215

Source: CSO

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Table 11.3 Main aggregates for industrial local units by county, 2008 (NACE Rev. 2)

Region	No. of units	Total engaged	Wages and salaries	Gross output	Industrial inputs
		No.	€m	€m	€m
Border					
Cavan	126	4,957	199	1,833	1,237
Donegal	239	5,131	145	840	519
Leitrim	38	1,012	31	368	93
Louth	198	5,941	216	3,743	909
Monaghan	142	4,275	133	1,108	790
Sligo	75	3,246	112	653	223
Midland					
Laois	98	1,977	66	413	286
Longford	73	3,035	100	773	502
Offaly	102	5,045	179	748	413
Westmeath	126	3,547	109	1,012	583
West					
Galway	319	14,970	539	2,854	1,123
Mayo	176	5,691	226	2,723	559
Roscommon	71	2,373	91	859	632
Dublin					
Dublin	1,249	40,027	1,740	17,327	7,190
Mid-East					
Kildare	226	12,225	558	5,321	1,637
Meath	239	6,753	252	1,462	898
Wicklow	176	5,431	207	1,577	741
Mid-West					
Clare	173	7,183	310	1,802	745
Limerick	256	13,844	615	12,684	9,368
North Tipperary	115	4,022	146	847	554
South-East					
Carlow	104	2,806	98	442	247
Kilkenny	158	3,147	121	1,049	732
South Tipperary	118	6,086	234	3,535	1,299
Waterford	176	8,672	350	2,972	976
Wexford	237	5,867	187	1,369	744
South-West					
Cork	751	30,043	1,316	31,534	9,607
Kerry	174	4,653	165	1,772	608
Non-attributable	24	7,410	579	4,261	1,867
All industries	5,959	219,369	9,022	105,881	45,082

Source: CSO

Table 11.3a Main aggregates for industrial local units by county, 2009 (NACE Rev. 2)

Region	No. of units	Total engaged	Wages and salaries	Gross output	Industrial inputs
		No.	€m	€m	€m
Border					
Cavan	109	4,787	168	1,434	1,059
Donegal	216	4,598	129	804	458
Leitrim	32	947	26	277	149
Louth	181	5,370	194	3,362	630
Monaghan	130	3,639	101	913	714
Sligo	74	3,059	110	621	299
Midland					
Laois	88	2,664	96	491	266
Longford	62	2,676	84	682	447
Offaly	97	4,869	158	701	372
Westmeath	111	3,004	94	909	524
West					
Galway	280	13,918	484	2,629	1,171
Mayo	170	5,611	204	2,815	513
Roscommon	65	2,231	89	961	652
Dublin					
Dublin	1,113	34,835	1,555	17,612	6,399
Mid-East					
Kildare	205	10,760	538	4,105	1,515
Meath	222	6,057	230	1,217	716
Wicklow	156	5,412	194	1,571	628
Mid-West					
Clare	165	6,667	243	1,224	510
Limerick	239	10,600	496	11,526	9,432
North Tipperary	102	3,865	155	756	489
South-East					
Carlow	91	2,590	88	357	181
Kilkenny	129	2,401	95	659	490
South Tipperary	102	6,092	247	3,185	953
Waterford	163	7,536	291	2,604	991
Wexford	219	5,305	166	1,163	641
South-West					
Cork	698	27,798	1,285	31,274	7,572
Kerry	157	4,252	162	1,709	468
Non-Attributable	24	7,254	568	3,667	1,212
All industries	5,400	198,798	8,249	99,227	39,449

Source: CSO

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Table 11.4 Volume indices of production for industrial sectors (NACE Rev. 2)

Base year 2005=100

Industrial sector	NACE code	2006	2007	2008	2009	2010
Mining and quarrying	5-9	101.9	98.6	92.2	80.4	74.8
Food products and beverages	10,11	101.5	104.0	101.1	96.7	100.0
Textiles and wearing apparel	13-14	77.1	63.6	59.5	49.6	46.5
Textiles	13	91.3	88.5	87.5	68.6	65.3
Wearing apparel	14	63.7	40.2	33.1	31.7	28.8
Leather and leather products	15	94.0	114.2	122.3	122.0	112.6
Wood and wood products	16	108.6	102.1	74.0	49.0	47.6
Paper and paper products; publishing, printing and reproduction of recorded media	17-18	98.2	104.5	98.4	82.4	77.4
Manufacture of pulp, paper and paper products	17	98.2	99.4	92.1	70.9	66.6
Publishing, printing and reproduction of recorded media	18	98.2	106.9	101.4	87.8	82.6
Chemicals, chemical products and man-made fibres	20-21	103.5	111.3	107.1	125.5	148.8
Rubber and plastic products	22	102.1	105.4	94.7	74.7	77.9
Other non-metallic mineral products	23	100.9	104.9	87.4	52.3	44.5
Basic metals and fabricated metal products	24-25	101.6	111.8	108.5	67.5	72.1
Basic metals	24	104.7	119.7	122.2	73.6	87.0
Fabricated metal products, except machinery and equipment	25	100.9	110.0	105.4	66.0	68.5
Machinery and equipment, not elsewhere classified	28	113.3	119.0	109.7	83.2	94.6
Electrical and optical equipment	26-27	110.1	115.0	115.1	81.0	60.3
Computer, electronic and optical products	26	110.3	116.1	116.8	82.8	61.1
Electrical equipment	27	107.5	102.5	94.9	59.8	51.2
Transport equipment	29-30	100.8	107.4	114.6	74.2	78.7
Manufacturing industries	10-33	103.3	109.0	105.8	101.7	110.1
Transportable goods industries	5-33	103.2	108.7	105.5	101.2	109.1
<i>of which Industries mainly or wholly producing</i>						
Capital goods		105.0	111.3	116.5	91.2	92.2
Intermediate products		103.8	107.0	98.6	74.6	66.6
Consumer goods		102.3	108.5	104.4	114.0	130.0
Durable consumer goods		97.5	109.5	94.3	64.3	63.8
Non-durable consumer goods		102.5	108.5	104.7	115.6	132.1
Energy-producing industries	05,06,19,35	101.4	104.1	108.2	100.8	103.8
All industries	5-35	103.0	108.4	105.8	101.2	108.8

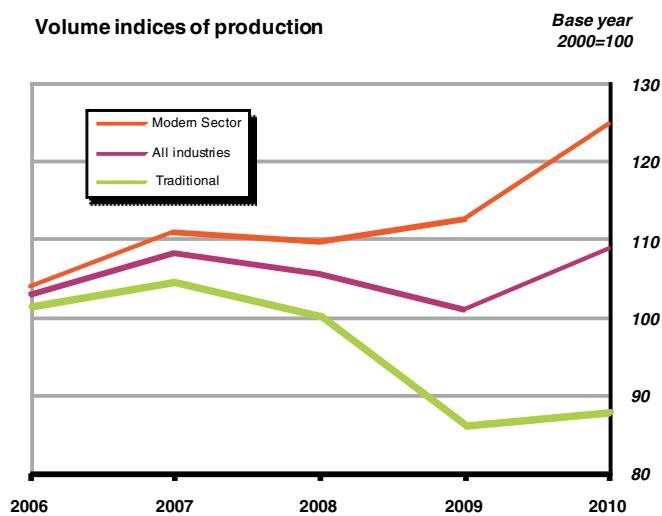
Source: CSO

Table 11.5 Volume indices of production for modern, traditional and all industries (NACE Rev. 2)

Base year 2005=100

Year	Modern sector		Traditional sector (All other sectors)		All industries	
	Index	Annual % change	Index	Annual % change	Index	Annual % change
2006	104.1	4.1%	101.6	1.6%	103.0	3.0%
2007	111.2	6.8%	104.7	3.0%	108.4	5.2%
2008	109.8	-1.2%	100.4	-4.1%	105.8	-2.4%
2009	112.7	2.8%	86.2	-14.2%	101.2	-4.4%
2010	124.8	10.7%	87.8	1.9%	108.8	7.5%

Source: CSO



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Table 11.6 Total stock changes and capital acquisitions in industry

€m

Industrial sector	NACE code	Total stock changes in industry		Total capital acquisitions in industry	
		Change in 2009	Change in 2010	Change in 2009	Change in 2010
Food products	10	-132.1	58.5	264.5	193.5
Beverages	11	-9.8	16.1	63.4	59.2
Textiles	13	-10.7	4.3	3.8	2.3
Wearing apparel	14	-0.4	-1.0	1.1	0.0
Leather and related products	15	-0.6	1.0	0.3	0.8
Wood and wood products, except furniture	16	-16.7	-4.5	17.0	16.8
Paper and paper products	17	-5.1	3.8	10.7	4.1
Printing and reproduction of recorded media	18	-3.1	10.5	32.1	19.6
Chemicals and chemical products	20	-172.3	71.0	46.3	39.9
Basic pharmaceutical products and preparations	21	-88.2	-179.2	581.1	353.8
Rubber and plastic products	22	-35.9	-1.4	29.9	47.2
Other non-metallic mineral products	23	-59.0	-4.4	90.5	17.0
Basic metals	24	-41.2	14.6	18.3	11.4
Fabricated metal products, except machinery and equipment	25	-29.4	2.2	22.4	16.7
Computer, electronic and optical products	26	-91.6	-9.4	194.1	159.2
Electrical equipment	27	-15.3	12.4	8.7	16.5
Machinery and equipment nec	28	-12.3	17.8	258.5	66.0
Other manufacturing	32	-9.2	28.7	151.5	155.4
Repair and installation of machinery and equipment	33	-5.7	-4.6	4.1	2.5
Electricity, gas, steam and air conditioning supply	35	-12.6	-43.8	1,037.2	882.7
Mining and quarrying	05-09	-16.3	2.6	82.0	64.1
Transportable goods industries	05-33	-781.8	99.1	1,995.8	1,343.40
Industries	05-39	-793.2	2.6	3,216.4	2,268.60
Manufacturing industries	10-33	-765.5	96.6	1,913.8	1,279.30
Tobacco; coke and refined petroleum products; furniture	12,19,31	-13	43.5	22.5	28
Transport equipment	29,30	-13.8	16.4	92.9	69.3
Water supply; sewerage, waste management and remediation activities	36-39	1.2	-3.5	93.4	42.6

Source: CSO

