

# Panorama of EU industry

Short-term supplement  
Latest information on EU industry

bi-monthly

3/1996





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**Short-term supplement**  
**Latest information on EU industry**

**bi-monthly**

**3/1996**

Theme  
**Energy and industry**  
Series  
**Short-term statistics**

**4**  
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ISSUE 3 - 1996  
Food, drink and tobacco  
Clothing  
Frequently Asked Questions

3/96

The re-launch of the Panorama Supplement and the move to a one-colour publication was well received by users in January 1995. For this edition of the Panorama Supplement we have again introduced a significant number of changes, with the aim of improving not only to the "look" of the publication, but also the content.

The two main changes to the publication are the switch to the Nace Rev. 1 classification system and the introduction of data for the three newest Member States (Austria, Finland and Sweden). At the same time, we have taken the opportunity to give additional information, for example, expanding the coverage of indicators for the USA and Japan, as well as refreshing the page layout.

In this issue there are special articles on

- ★ the food, drink and tobacco industry;
- ★ the clothing industry;
- ★ frequently asked questions.

In the EU there was a slowdown in economic activity, which was reflected in the production index for total industry, which fell from an annual growth rate of 6.6% in January 1995 to 0.6% in December 1995.

The food, drink and tobacco industry accounted for 16.5% of total EU manufacturing production in 1995. Over recent years a growing phenomenon in the industry has been that of merger activity, generally in relation to horizontal integration, as a means to expand market share.

The article on clothing was provided by OETH, the first time we have had a guest author supplying a text for an article in the Supplement. The clothing industry has seen a significant shift in production. Countries such as Tunisia, Poland, Morocco and Romania have benefited from the growth of OPT (Outward Processing Trade). This process sees EU producers exporting their fabrics for making up in third countries, to subsequently be re-imported into the EU.

The final article is based on the Internet phenomenon of FAQs (frequently asked questions). The article gives a brief overview of the role and organisation of Eurostat, and a more detailed view of unit D2 (which is responsible for industry statistics), as well as responses to the most frequently asked questions posed to the unit.

**PHOTIS NANOPOULOS, DIRECTOR**

BUSINESS AND ENERGY STATISTICS, R&D, AND STATISTICAL METHODS

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## ISSUE 3 - 1996

### Food, drink and tobacco

### Clothing

### Frequently Asked Questions

The supplement appears six times during the course of the year.

The Panorama of EU Industry provides users of enterprise statistics each year with a complete and detailed publication on the state of and main trends in industry and services.

The Panorama Short-term Supplement has a simple objective: to furnish readers of the annual Panorama with an instrument which will allow them to follow the evolution of industrial short-term trends and also show the structure and activity of industry at the sectorial level. In addition the Supplement aims to provide topical articles of general interest to the reader.

The data processing, statistical analysis, writing of the chapters and desktop publishing were carried out by the following team at Eurostat:

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Non-metallic mineral products  
Paper, printing and publishing  
Competitiveness study



In its Spring 1996 forecast, the European Commission expected a growth in GDP of 2.5% for 1995, 1.5% for 1996, and 2.4% for 1997. Due to a slowdown in economic activity at the end of 1995 and the beginning of 1996, the preliminary growth rate for 1996 had to be revised downwards by 1.1 percentage points, from 2.6%. The International Monetary Fund predicted a 2.0% increase in real GDP for the main industrial economies as a whole for 1996 in its latest World Economic Outlook. The IMF also predicted an increase in GDP growth for 1997 for the industrialised countries to 2.6%, concluding that the slow down in economic growth in 1996 would be temporary.



For 1995, the latest macroeconomic data from the Member States displayed a decline in the change in real GDP compared to 1994. Compared to the same quarter in 1994, gross domestic product in constant prices rose by 2.7% in the second quarter of 1995, down from a rate of 3.5% in the first quarter. Growth dropped further to 2.3% in the third quarter. The decline in the second quarter was caused mainly by a drop in the growth rate of exports, which continued into the third quarter. A slowing down in the increase in gross fixed capital formation put more pressure on demand, only to be apprehended by a doubling in the expansion of stocks. Although the rate of growth in private consumption reached a high of 2.1% in the second quarter of 1995, its development remained depressed compared to 1994 in most Member States. The growth in real private consumption declined by over one per cent in the third quarter of 1995 from the second quarter in Germany, France, the Netherlands, Austria and Finland. In Germany and France, private consumption as a whole even declined, by 0.6% and 0.1% respectively.

The latest reports on GDP growth for the last quarter of 1995 showed the downward trend continuing, confirming the picture given by the first three quarters. In Germany, France, Italy, Denmark and Sweden GDP fell in the fourth quarter of 1995 by 0.5%, 0.3%, 1.0%, 0.2% and 0.4% respectively. Their 1995 real GDP growth came to 1.9%, 2.4%, 3.0%, 2.6% and 3.7% (in the same order). The turnaround did not result in negative growth rates for the fourth quarter in the United Kingdom, Spain and the Netherlands, although in these countries too, economic growth slowed in the final quarter of 1995.

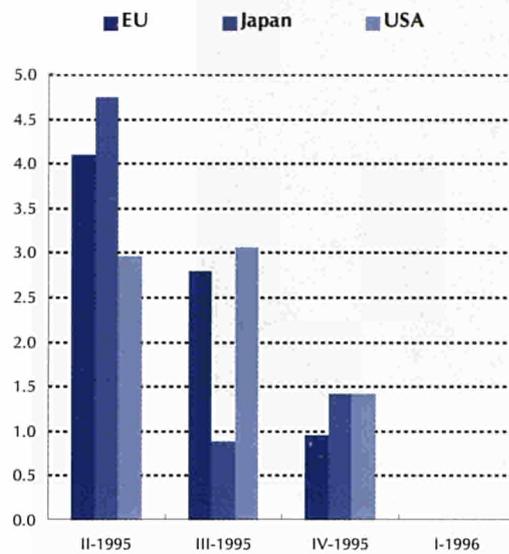
Data available now on the first nine quarters after the end of the last recession (starting with the second quarter of 1993), show that the recent period of growth in Europe has been one that was led by exports and gross fixed capital formation (including the change in stocks). The former grew by an average annual rate of 6.9%, while the latter attained an average rate of 7.8% - the highest growth rate of all the components of GDP. Most of this rate was caused by increases in the

Both the European Commission and the IMF predicted an acceleration in economic growth for 1997 after a dip in 1996

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FIGURE 1.1

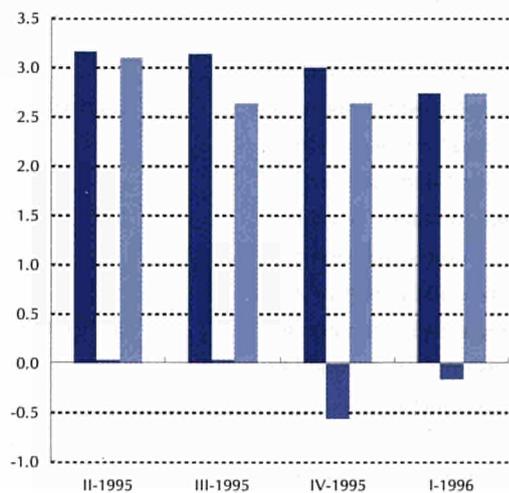
Year on year growth rates (t / t-4) for industrial production (%)



SOURCE: eurostat

FIGURE 1.2

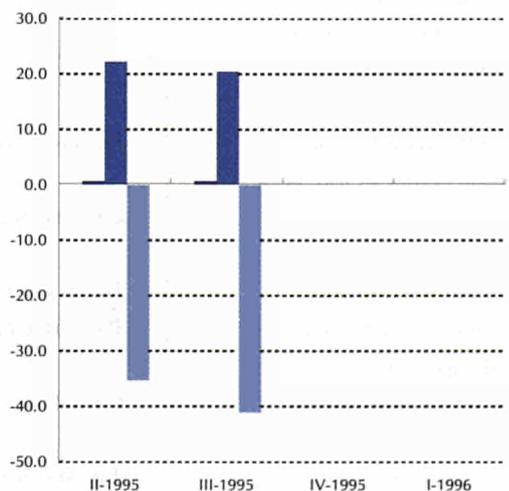
Year on year growth rates (t / t-4) for consumer prices (%)



SOURCE: eurostat

FIGURE 1.3

Quarterly trade balance (billion ECU)



SOURCE: eurostat

change of stocks as gross fixed capital formation alone reached a growth rate of just 3.0%. GDP itself grew by an annual real average of 2.7%. As the shares in GDP of both exports and gross fixed capital formation (including the change in stocks) increased, those of private and government consumption declined. The share of private consumption for the 15 Member States as a whole came down from 64.0% at the end of the recession to 62.6% by the third quarter of 1995, while that of government consumption declined from 17.5% to 16.9% during the same period. This pattern was replicated in nearly all Member States, though to a varying degree.

At the level of the European Union, imports grew by a rate very close to that of exports. The balance of trade as a share of GDP declined from -1.5% in the second quarter of 1993 to -1.2% in the third quarter of 1995. However, the experiences of individual Member States were twofold. While the share of exports in GDP increased most in Spain and Austria (from 26.6% to 33.7% and from 47.8% to 53.0% respectively), the share of imports grew by even more creating a larger deficit as a proportion of GDP for these countries. The balance of trade improved in Germany and the United Kingdom, where the trade deficit as a percentage of GDP declined to 4.1% and 1.2%. In Italy and Sweden, the surplus grew from 0.4% to 2.6% of GDP and from 2.8% to 6.7%.

Inflation in the 15 Member States continued to decline through to February 1996. The EUR15 annual rate for 1995 came to 3.1%, which by February had dropped to 2.7%. Ten Member States had inflation equal to or lower than 2.0%. Not only was inflation lower in the European Union than at the start of 1995, the difference between Member States has also declined. In February 1995, the difference between the maximum rate of inflation (10.4% in Greece) and the minimum (1.7% in France) was 8.7%. By February 1996, this had dropped to 8.0%.

The EUR15 unemployment rate edged up a little further in the first months of 1996. Germany particularly experienced a rapid increase in the number of unemployed, reaching 10.4% of the active population in March; it had ended 1995 with a rate of 9.9%. In other Member States, the rate remained fairly stable. Only Austria saw a substantial decline in its unemployment rate, from 4.9% in December 1995 to 3.9% in March 1996. A large part of the increase in Austrian employment came from construction where the number of jobs increased by 48% in March 1994. The amount of part-time work also increased. Over January and February 1996, the number of working days from part-time employment already equalled the total for 1995.

	EUR15	Japan	USA
03-95	4.9	5.6	4.7
04-95	4.3	5.8	2.9
05-95	4.7	5.6	3.1
06-95	3.4	2.9	2.8
07-95	3.5	1.0	2.8
08-95	3.2	1.2	3.2
09-95	1.9	0.4	3.1
10-95	0.6	1.5	1.7
11-95	1.2	0.9	1.5
12-95	1.0	1.8	1.0
01-96	0.5	N/A	0.2
02-96	0.4	N/A	N/A

TABLE 1.1

Year on year  
 growth rates (t / t-12)  
 for industrial  
 production  
 (%)

SOURCE:  eurostat

	EUR15	Japan	USA
04-95	3.2	-0.2	3.1
05-95	3.1	0.0	3.2
06-95	3.2	0.3	3.0
07-95	3.1	0.1	2.8
08-95	3.1	-0.2	2.6
09-95	3.2	0.2	2.5
10-95	3.0	-0.7	2.8
11-95	3.0	-0.7	2.6
12-95	3.0	-0.3	2.5
01-96	2.8	-0.4	2.7
02-96	2.7	-0.2	2.7
03-96	2.7	0.1	2.8

TABLE 1.2

Year on year  
 growth rates (t / t-12)  
 for consumer prices  
 (%)

SOURCE:  eurostat

	EUR12	Japan	USA
12-94	2.7	10.7	-10.3
01-95	-2.7	2.3	-13.5
02-95	0.0	9.0	-9.3
03-95	0.9	10.5	-9.7
04-95	0.2	8.1	-10.7
05-95	-0.5	5.3	-11.9
06-95	1.0	8.8	-12.8
07-95	1.8	7.0	-14.8
08-95	-0.1	4.6	-13.9
09-95	-1.1	8.8	-12.4
10-95	N/A	4.1	-14.0
11-95	N/A	5.0	-11.7

TABLE 1.3

Monthly trade balance  
 (billion ECU)

SOURCE:  eurostat

In the USA, the rhythm of activity slowed down in 1995, but remained satisfactory. GDP grew by 2.0% year-on-year, after a remarkable 3.5% in 1994 - with some acceleration in the second half-year (2.0% at an annual rate compared to 1.2% in the first half-year). Private consumption moderated (2.4% year-on-year after 3.0% in 1994) and public consumption fell further, by 0.3%. Gross fixed capital formation remained strong (5.3% year-on-year), thanks essentially to private investment in equipment. The reduction in inventory accumulation subtracted 0.4% from growth.

Exports and imports kept growing fast in 1995, particularly as regards goods for which exports increased by 10.8% and imports by 9.2%. Relative to GDP, the deficit of the trade balance remained at 2.4% and the current account deficit at 2.0% (national accounts definitions).

Inflation remained moderate during the twelve months to March 1996. The annual rate moved between 2.5% and 3.1%, ending up at 2.8%. The rate of unemployment stayed at 5.5% over the same period.

In Japan, output picked up in the second quarter of 1995, so that GDP grew by 0.9% year-on-year for 1995 as a whole. Prospects are favourable for 1996. In the last three quarters of 1995, public investment has been the main contributor to growth although it accounts for only 6.5% of GDP. This support to activity should fade away towards the end of 1996, according to the present policy stance of the Japanese authorities. However, business investment and private consumption also strengthened in 1995 and they provide scope for a self-sustained recovery.

Due to the sustained buoyancy of imports of goods and services (13.5% yearly growth, at 1990 prices), the net contribution of the external sector reduced GDP growth by 0.7% in 1995. The surplus of the current account fell to 2.2% of GDP, down from 3.2% in 1993 and 2.7% in 1994.

The price level of output measured by the GDP deflator fell by 0.3% last year, a record low for inflation. This has to be related to the high level of the yen and to the existence of important unutilised capacities of production.

Developments in European industry reflected the general slow down of economic activity towards the end of 1995. The rate of growth of production volume for total industry in the 15 Member States decelerated to 3.2% in 1995, down from 5.0% in 1994. The pace of production growth declined throughout 1995, as its annual rate dropped from 6.6% in



January to 0.6% in December 1995, in a practically continuous manner. Sectors producing intermediate goods and durable consumer products were hit hardest. The rate of growth in production volume declined from 6.1% in 1994 to 2.7% in 1995 for intermediate goods and from 7.0% to 3.5% for consumer durables (same period as above). The non-durable consumer goods industry registered the lowest rate of growth of 1.1% in 1995.

Capital goods producing sectors broke the general trend - their production volume growth accelerated from 5.2% in 1994 to 6.3% in 1995. This development corresponds to the prominent role of gross fixed capital formation in the period of economic growth since the last recession. It also explains why, during this two-year period, capacity utilisation (only available for EUR12) has increased by just 5.0 percentage points - from a low of 77.6% in the third quarter of 1993 to 82.6% in the fourth quarter of 1995.

This in turn has kept increases in producer prices at moderate levels. Over 1995, the EUR15 average increase in output prices in national currencies amounted to 3.9%. This rate could have been even lower had not the intermediate goods sectors been affected by the jump in commodity prices on world markets resulting in a rate for the sector of 4.8%. The EUR15 average producer price inflation for 1995 for the capital goods and consumer goods sectors lay between 2.5% and 3.0%.

The 1995 European average rate of growth of production volume for 1995 was exceeded by Italy (6.0%), Portugal (4.2%), Spain (4.6%) and Ireland (11.9%). Marked turnarounds took place in Germany and France. At the end of 1994, their year-on-year growth rates of production volume were near the European average. By September of 1995, growth had turned negative in both countries. Germany's industrial sectors registered a positive year-on-year growth rate of 2.2% again by January 1996, although France's was still below zero. For 1995 as a whole, production volume increased by 0.8% in Germany and by 1.3% in France.

Supported by high

levels of investment

capital goods sectors

thrive as other sectors

experience slow down

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FIGURE 2.1

EUR15 production index by goods sector, trend-cycle, (1990 = 100)

— Total industry  
- - - Intermediate goods  
— Capital goods  
— Consumer durables  
- - - Consumer non-durables

SOURCE: 

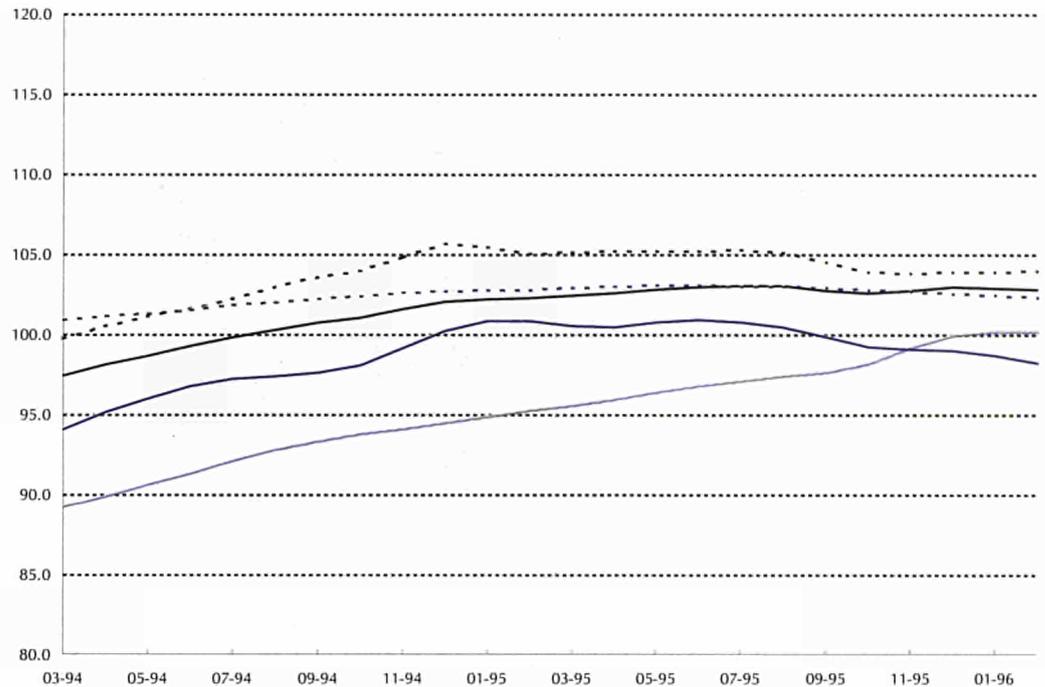


TABLE 2.1

Three month on three month growth rates for the production index, based on a seasonally adjusted series (%)

SOURCE: 

	Latest quarter available		Total industry	Intermediate goods	Capital goods	Consumer durables	Consumer non-durables
EUR15	12-95	⇨ 02-96	0.7	0.0	2.4	-0.3	-0.3
B	08-95	⇨ 10-95	-1.4	0.6	-1.7	-9.6	0.8
DK	12-95	⇨ 02-96	-2.7	-2.3	-1.4	-5.7	-4.2
D	12-95	⇨ 02-96	1.3	-2.0	5.2	-2.5	1.6
GR	11-95	⇨ 01-96	-2.5	-2.6	-6.0	2.5	0.3
E	12-95	⇨ 02-96	-1.1	-0.3	-0.5	-3.6	-3.8
F	12-95	⇨ 02-96	0.9	-0.1	1.2	1.0	-0.5
IRL	10-95	⇨ 12-95	3.8	-1.5	8.9	N/A	0.9
I	12-95	⇨ 02-96	-0.1	-0.9	2.0	-2.0	0.3
L	11-95	⇨ 01-96	-4.0	-8.6	4.5	8.9	-1.9
NL	10-95	⇨ 12-95	1.0	0.9	1.9	0.7	0.1
A			N/A	N/A	N/A	N/A	N/A
P	09-95	⇨ 11-95	-0.7	0.6	2.9	-5.4	-5.0
FIN	12-95	⇨ 02-96	-0.1	-0.9	0.3	3.6	0.1
S	12-95	⇨ 02-96	-2.0	-1.5	-2.4	0.1	-2.7
UK	12-95	⇨ 02-96	0.1	0.1	-0.4	2.1	0.2

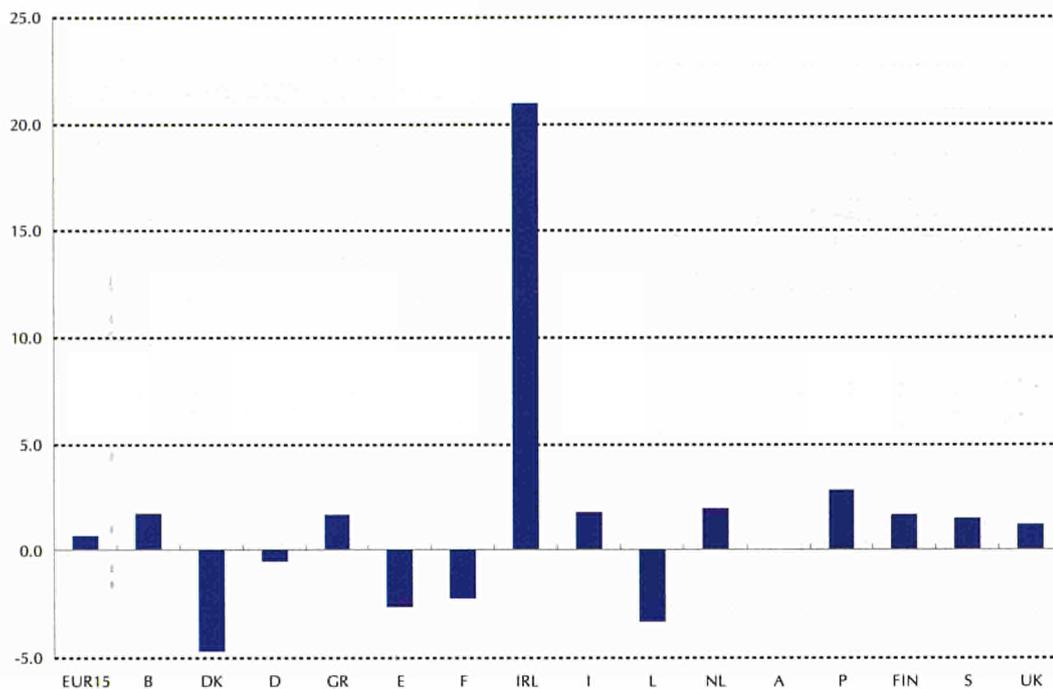


FIGURE 2.2

Year on year growth rates for the production index, based on changes from the corresponding quarter of the previous year (%)

SOURCE: eurostat

	Latest quarter available		Total industry	Intermediate goods	Capital goods	Consumer durables	Consumer non-durables
EUR15	12-95	⇄ 02-96	0.6	-1.6	6.0	-2.7	-0.4
B	08-95	⇄ 10-95	1.7	-3.9	0.4	-5.1	4.5
DK	12-95	⇄ 02-96	-4.8	-8.6	0.2	-9.2	-4.2
D	12-95	⇄ 02-96	-0.6	-6.4	7.0	-6.6	1.4
GR	11-95	⇄ 01-96	1.6	0.6	3.2	13.0	2.5
E	12-95	⇄ 02-96	-2.7	-2.0	0.5	-5.4	-7.2
F	12-95	⇄ 02-96	-2.3	-2.6	-1.0	2.4	-0.8
IRL	10-95	⇄ 12-95	20.9	6.6	49.5	N/A	6.1
I	12-95	⇄ 02-96	1.8	-1.2	14.1	-1.4	1.7
L	11-95	⇄ 01-96	-3.4	-7.3	2.5	84.4	-4.5
NL	10-95	⇄ 12-95	2.0	2.3	3.3	1.5	0.4
A		⇄	N/A	N/A	N/A	N/A	N/A
P	09-95	⇄ 11-95	2.8	2.5	6.0	-2.5	-0.8
FIN	12-95	⇄ 02-96	1.6	-0.6	11.5	13.5	-0.3
S	12-95	⇄ 02-96	1.4	-3.8	9.6	-1.4	-0.5
UK	12-95	⇄ 02-96	1.2	2.9	1.0	0.1	-2.4

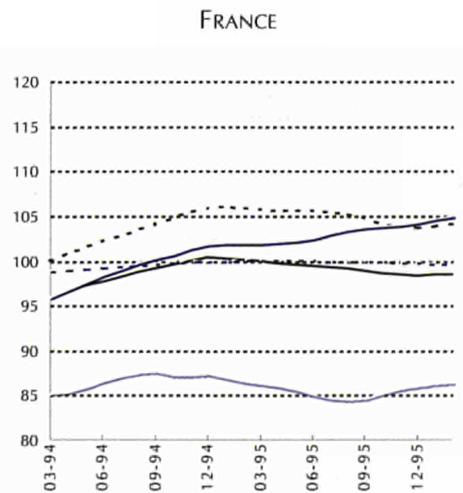
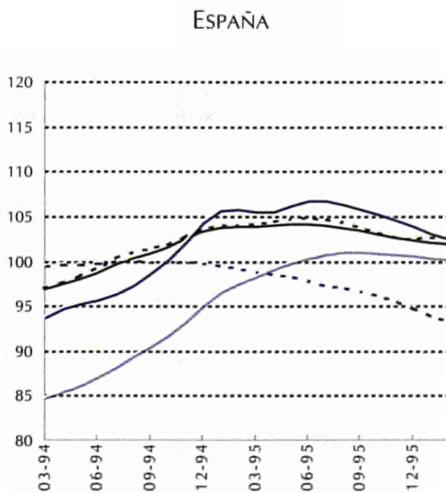
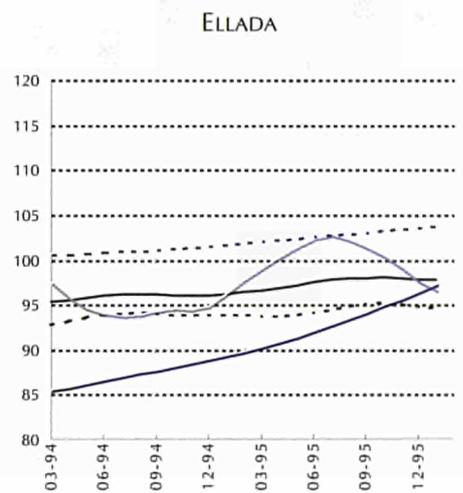
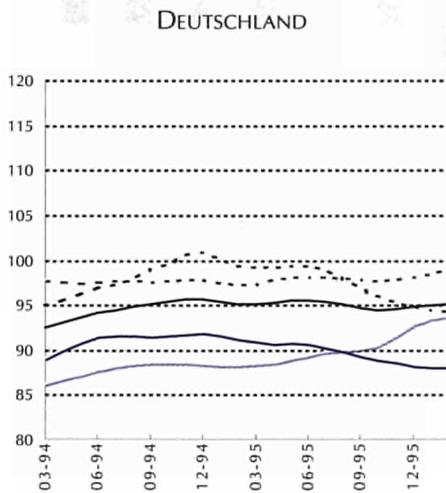
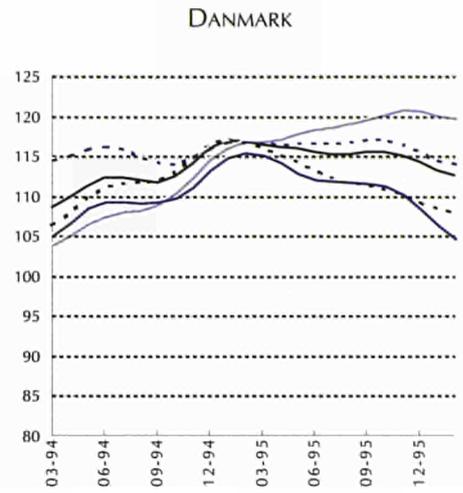
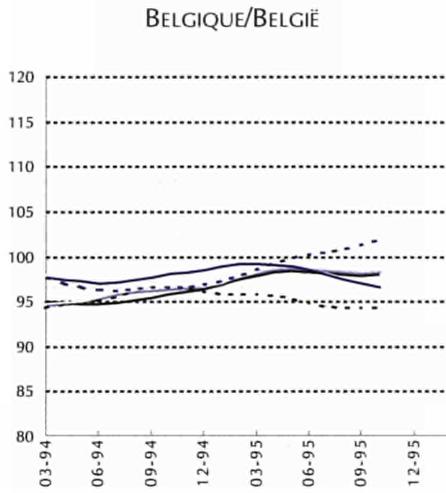
TABLE 2.2

Year on year growth rates for the production index, based on changes from the corresponding quarter of the previous year (%)

SOURCE: eurostat

FIGURE 2.3

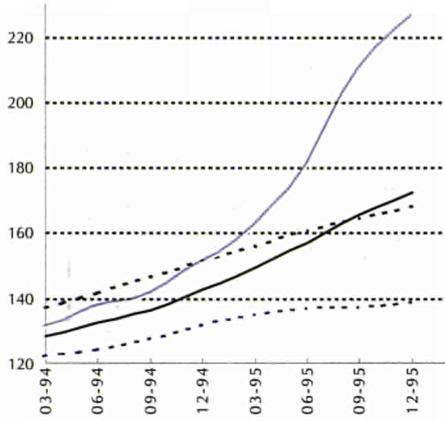
Production index by goods sector, trend-cycle (1990 = 100)



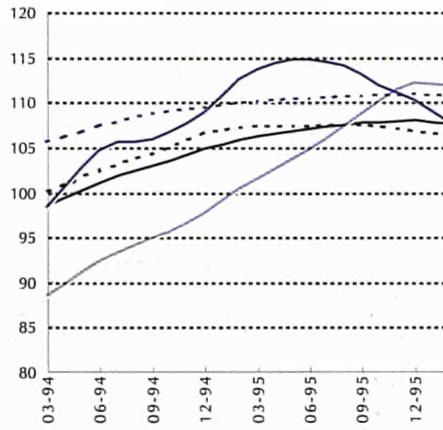
- Total industry
- - - Intermediate goods
- Capital goods
- Consumer durables
- - - Consumer non-durables

SOURCE: eurostat

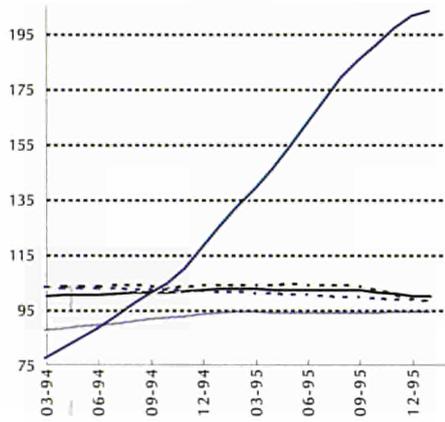
IRELAND



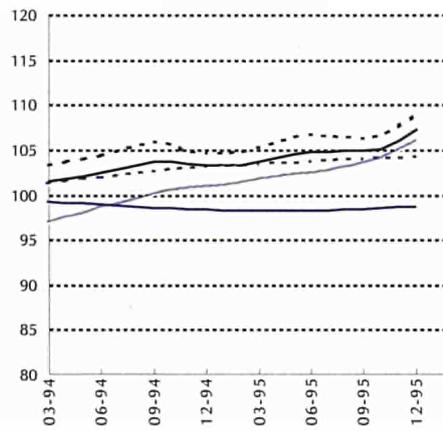
ITALIA



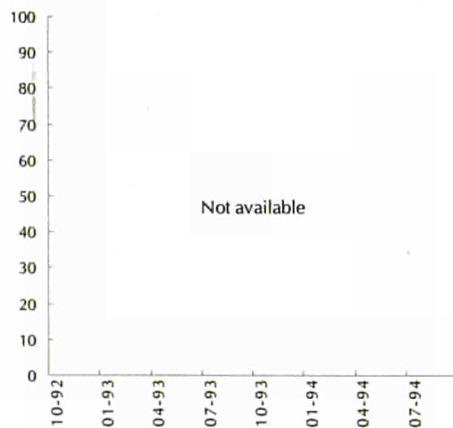
LUXEMBOURG



NEDERLAND



ÖSTERREICH



PORTUGAL

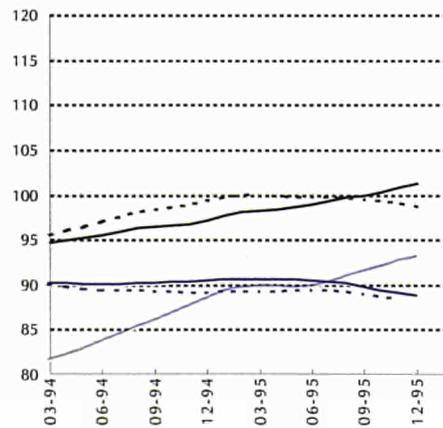


FIGURE 2.3

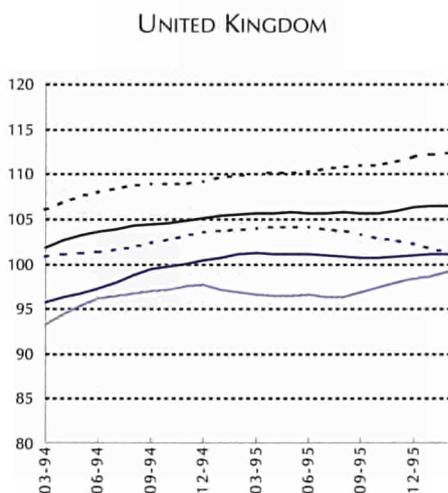
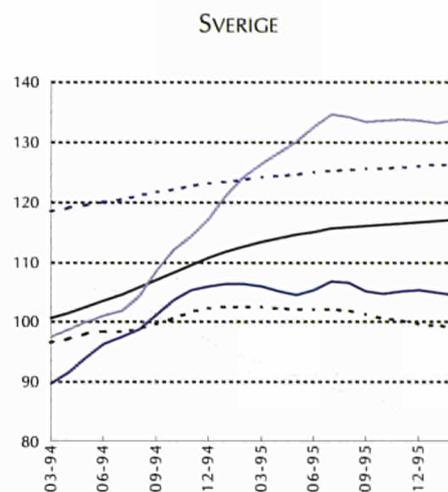
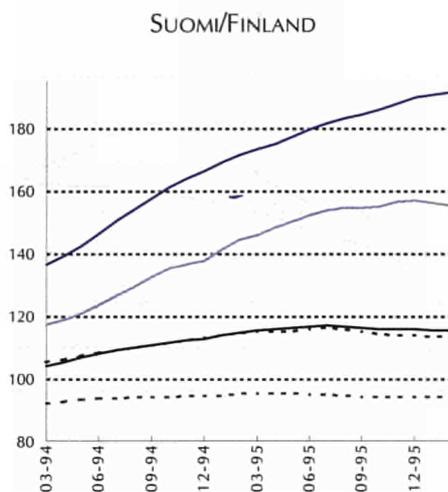
Production index by  
goods sector,  
trend-cycle  
(1990 = 100)

- Total industry
- - - Intermediate goods
- Capital goods
- Consumer durables
- - - Consumer non-durables

SOURCE:  eurostat

FIGURE 2.3

Production index by goods sector, trend-cycle (1990 = 100)



- Total industry
- - - Intermediate goods
- Capital goods
- Consumer durables
- - - Consumer non-durables

SOURCE: eurostat

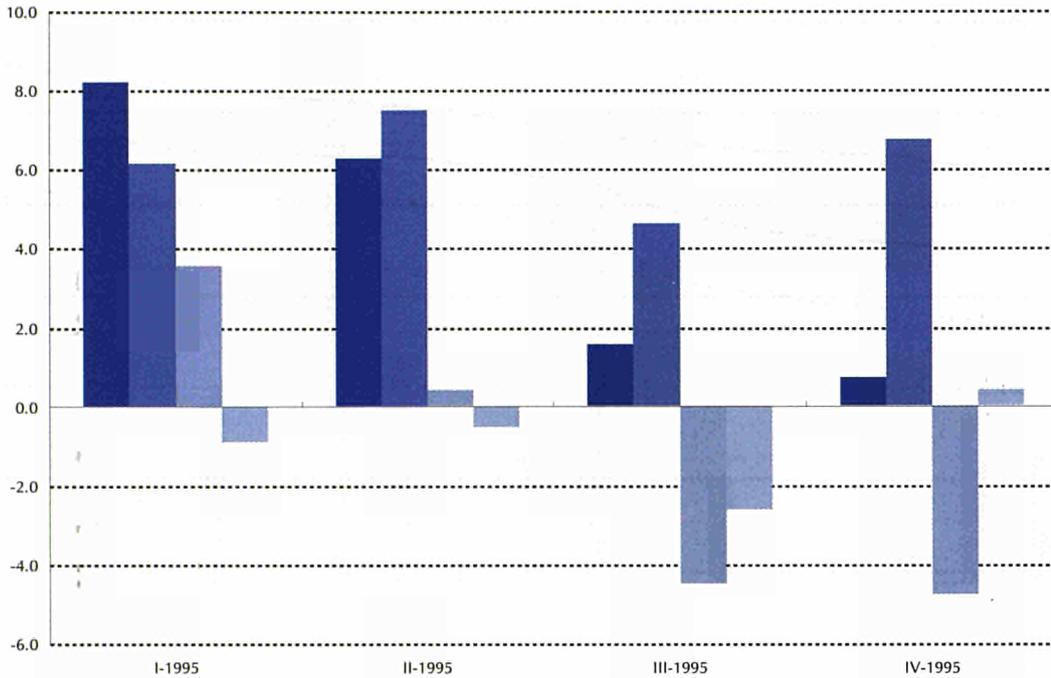


FIGURE 2.4

Japanese year on year growth rates for industrial production, based on changes from the corresponding quarter of the previous year (%)

- Intermediate goods
- Capital goods
- Consumer durables
- Consumer non-durables

SOURCE:  eurostat

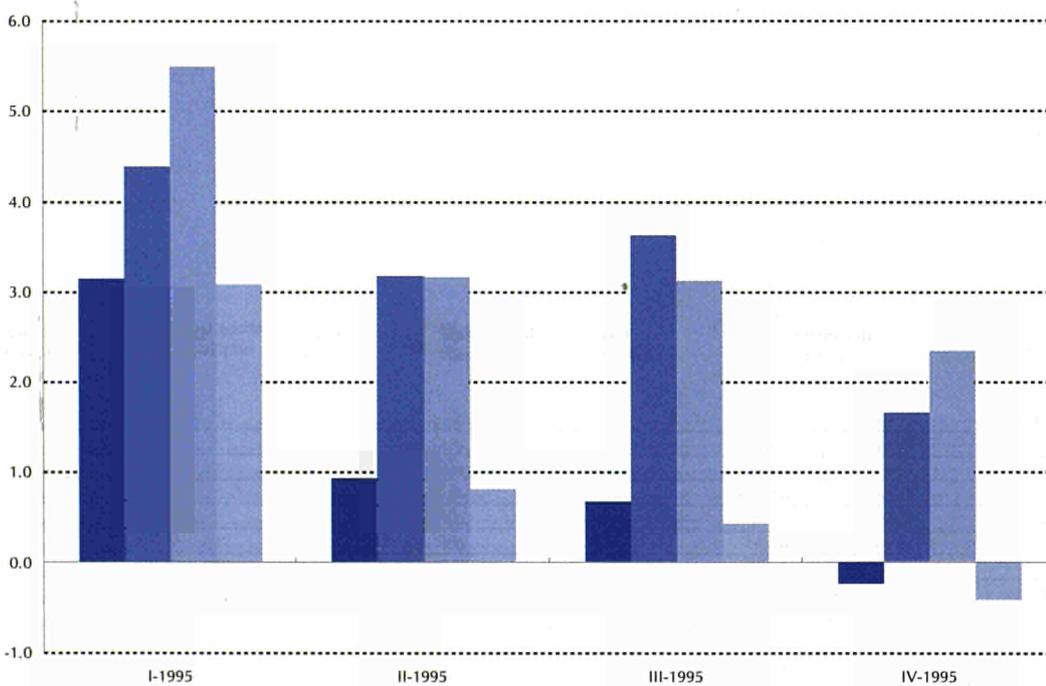


FIGURE 2.5

American year on year growth rates for industrial production, based on changes from the corresponding quarter of the previous year (%)

- Intermediate goods
- Capital goods
- Consumer durables
- Consumer non-durables

SOURCE:  eurostat

FIGURE 2.6

EUR15 producer price index by goods sector, in national currencies (1990 = 100)

- Total industry
- - - Intermediate goods
- Capital goods
- Consumer durables
- - - Consumer non-durables

SOURCE: 

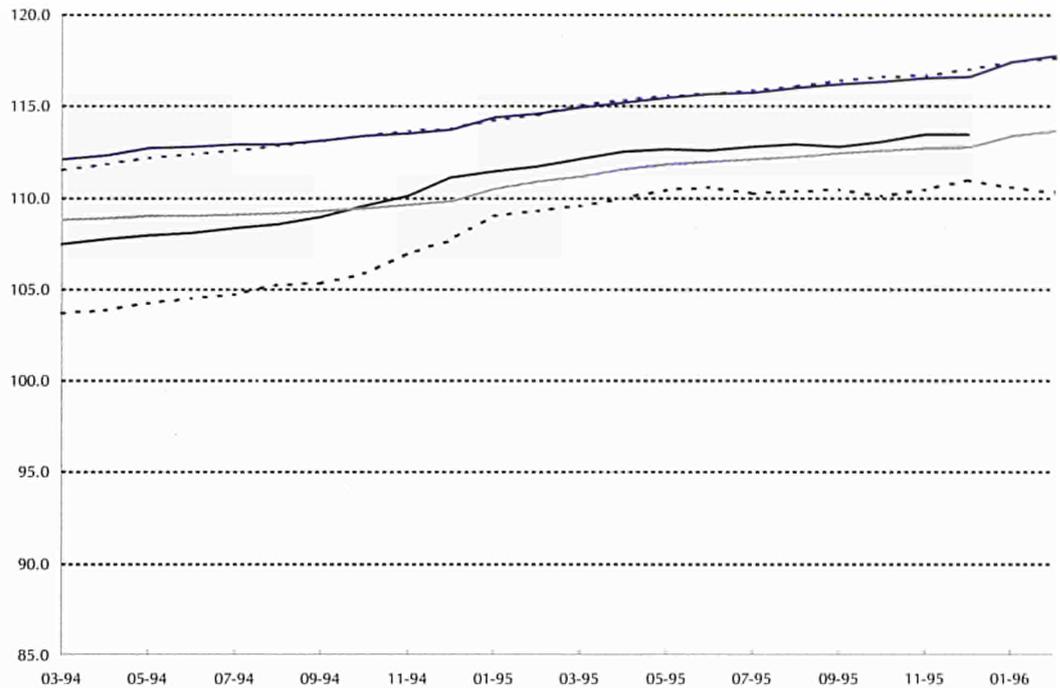


TABLE 2.3

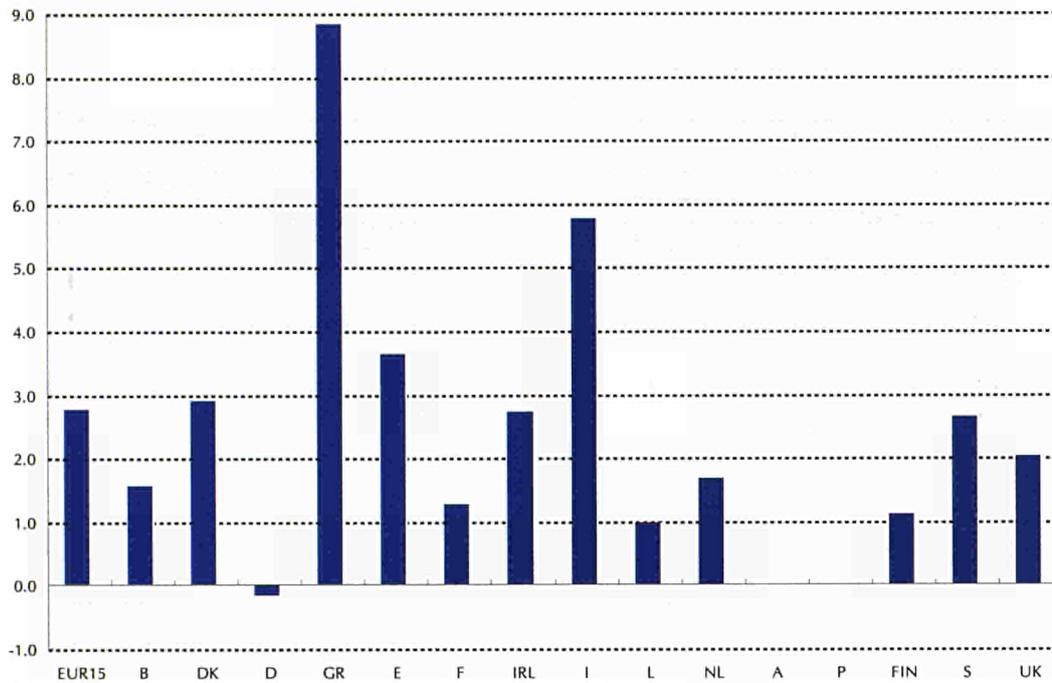
Three month on three month growth rates for the producer price index, in national currencies (%)

SOURCE: 

	Latest quarter available		Total industry	Intermediate goods	Capital goods	Consumer durables	Consumer non-durables
EUR15	11-95 ⇔ 01-96		0.4	0.3	0.5	0.6	0.6
B	12-95 ⇔ 02-96		0.1	0.3	0.1	N/A	-0.4
DK	12-95 ⇔ 02-96		0.1	0.3	-0.7	0.8	0.3
D	01-96 ⇔ 03-96		-0.6	-1.5	0.7	0.5	-0.2
GR	12-95 ⇔ 02-96		2.9	2.8	3.0	2.2	3.1
E	12-95 ⇔ 02-96		0.4	-0.5	0.8	1.1	1.7
F	11-95 ⇔ 01-96		-0.1	-0.3	0.1	0.2	0.2
IRL	12-94 ⇔ 02-95		1.0	0.5	N/A	N/A	0.3
I	12-95 ⇔ 02-96		0.2	-0.3	0.7	1.7	0.6
L	12-95 ⇔ 02-96		-0.4	-2.0	0.5	0.6	0.0
NL	10-95 ⇔ 12-95		-0.2	-0.4	-0.3	-0.3	0.7
A			N/A	N/A	N/A	N/A	N/A
P			N/A	N/A	N/A	N/A	N/A
FIN	01-96 ⇔ 03-96		0.3	0.2	1.4	0.4	0.2
S	01-96 ⇔ 03-96		-0.4	0.5	0.4	1.8	-1.8
UK	01-96 ⇔ 03-96		1.0	0.5	0.9	1.0	1.4

FIGURE 2.7

Year on year growth rates for the producer price index, based on changes from the corresponding quarter of the previous year, in national currencies (%)



SOURCE: eurostat

TABLE 2.4

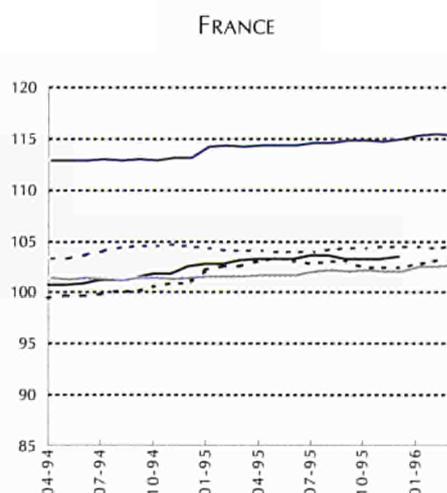
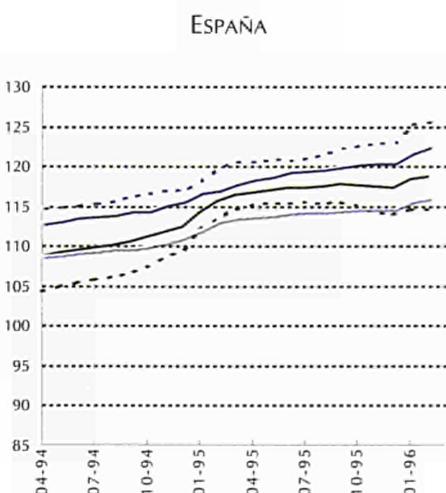
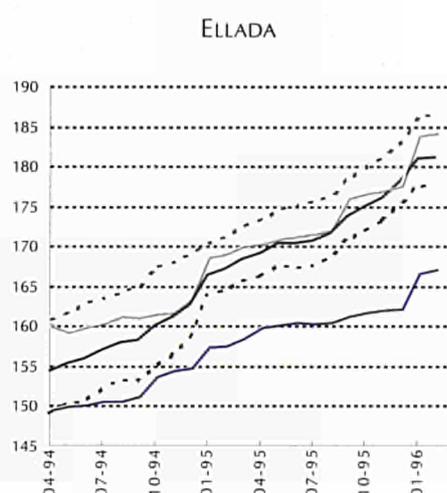
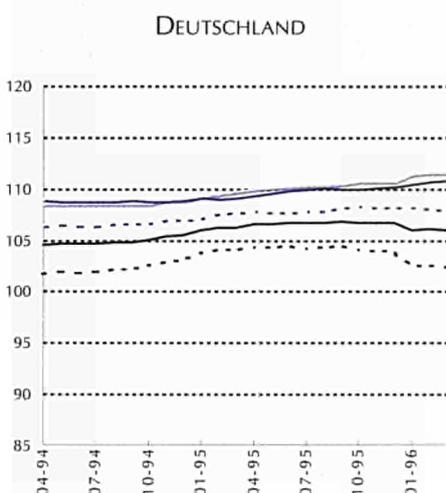
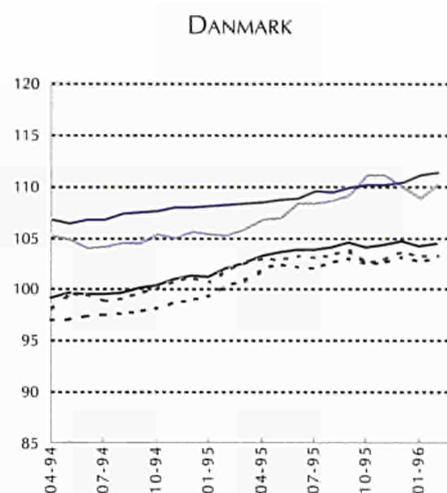
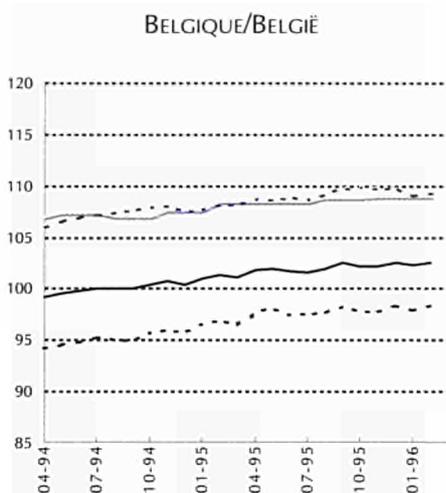
Year on year growth rates for the producer price index, based on changes from the corresponding quarter of the previous year, in national currencies (%)

	Latest quarter available		Total industry	Intermediate goods	Capital goods	Consumer durables	Consumer non-durables
EUR15	11-95	01-96	2.8	2.6	2.8	2.6	2.8
B	12-95	02-96	1.6	1.9	0.9	N/A	1.4
DK	12-95	02-96	2.9	3.4	4.0	2.6	2.1
D	01-96	03-96	-0.2	-1.5	1.8	1.4	0.5
GR	12-95	02-96	8.8	9.0	8.8	5.5	8.9
E	12-95	02-96	3.6	2.5	3.0	4.3	5.3
F	11-95	01-96	1.3	1.2	0.8	1.3	-0.1
IRL	12-94	02-95	2.7	0.9	N/A	N/A	2.6
I	12-95	02-96	5.8	6.7	5.2	5.0	5.0
L	12-95	02-96	1.0	1.2	2.1	1.3	0.6
NL	10-95	12-95	1.7	1.7	1.5	0.7	1.7
A			N/A	N/A	N/A	N/A	N/A
P			N/A	N/A	N/A	N/A	N/A
FIN	01-96	03-96	1.1	1.9	3.1	1.5	-1.4
S	01-96	03-96	2.6	4.2	2.0	4.4	1.2
UK	01-96	03-96	2.0	0.1	2.5	2.7	4.0

SOURCE: eurostat

FIGURE 2.8

Producer price index by goods sector, in national currencies (1990 = 100)

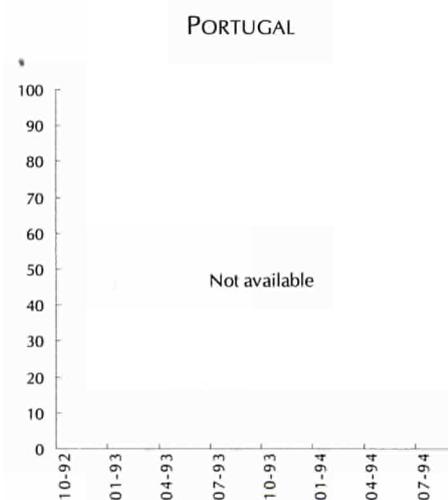
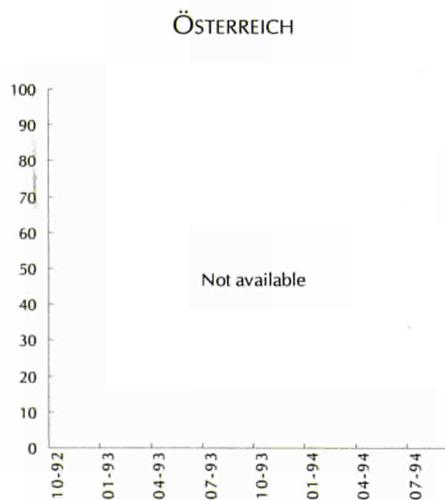
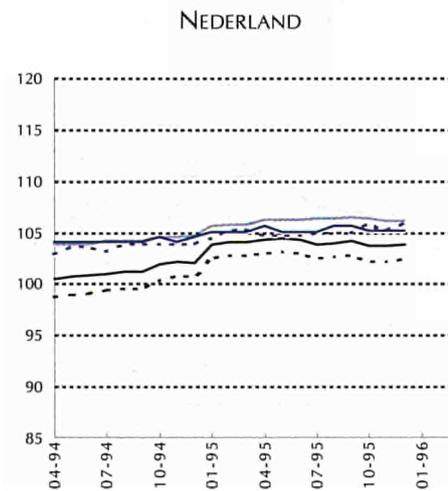
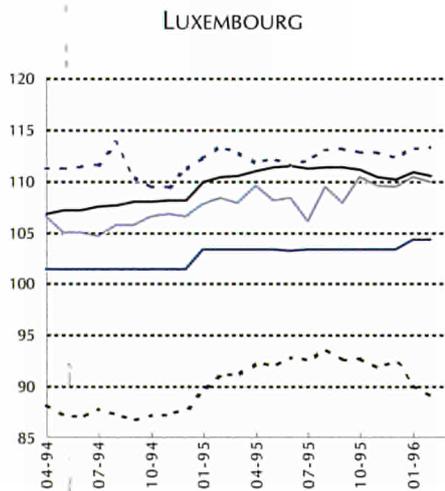
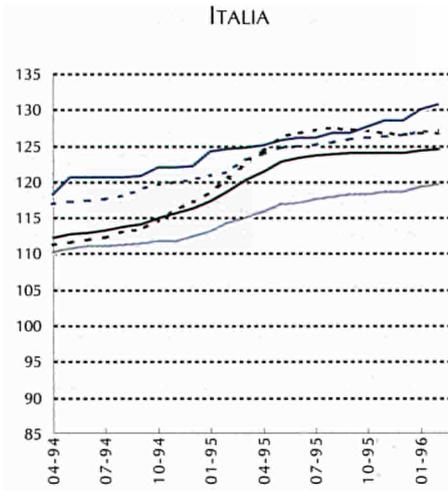
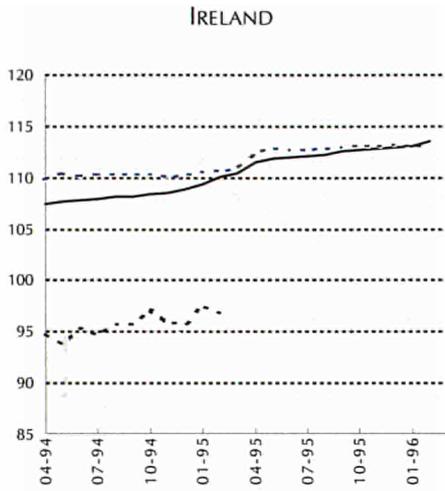


- Total industry
- - - Intermediate goods
- Capital goods
- Consumer durables
- - - Consumer non-durables

SOURCE: eurostat

FIGURE 2.8

Producer price index  
by goods sector,  
in national currencies  
(1990 = 100)

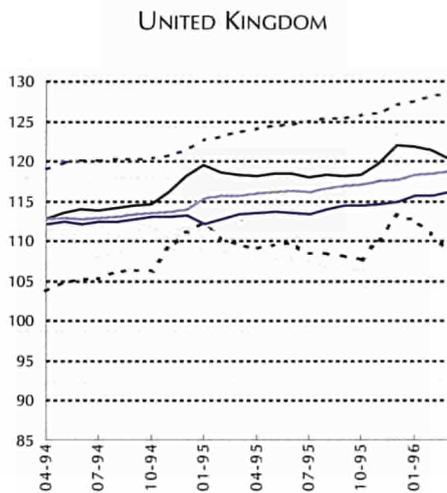
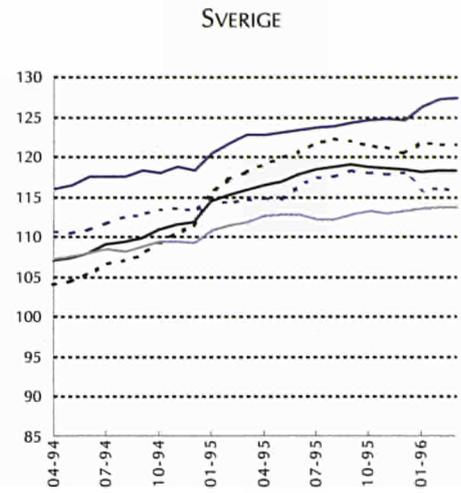
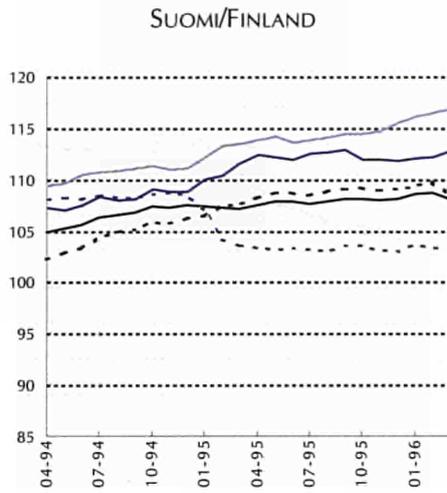


- Total industry
- - - Intermediate goods
- Capital goods
- Consumer durables
- - - Consumer non-durables

SOURCE:  eurostat

FIGURE 2.8

Producer price index  
by goods sector,  
in national currencies  
(1990 = 100)



- Total industry
- - - Intermediate goods
- Capital goods
- Consumer durables
- - - Consumer non-durables

SOURCE:  eurostat

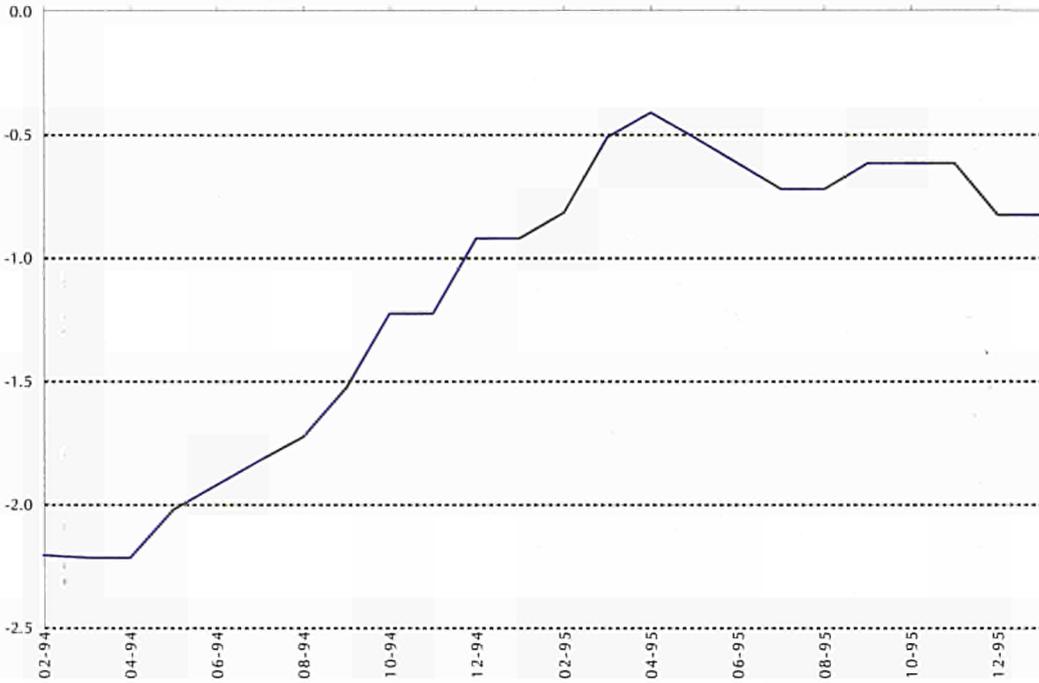


FIGURE 2.9

Japanese year on year growth rates for producer prices, based on changes from the corresponding quarter of the previous year, in national currency (%)

SOURCE:  eurostat



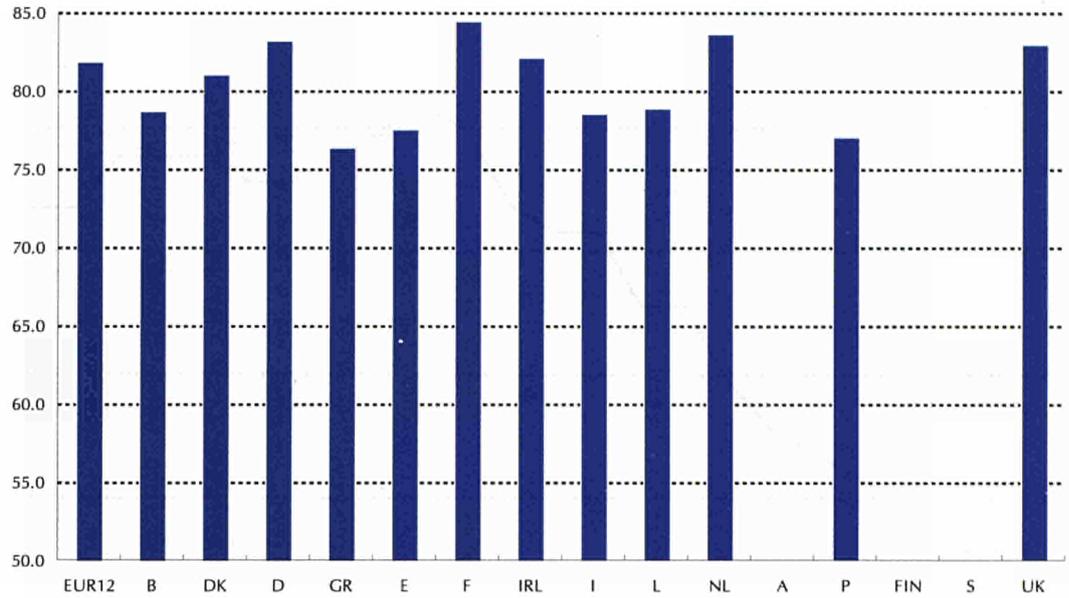
FIGURE 2.10

American year on year growth rates for producer prices, based on changes from the corresponding quarter of the previous year, in national currency (%)

SOURCE:  eurostat

FIGURE 2.11

Total industry:  
capacity utilisation  
rates, first quarter  
1996  
(%)



SOURCE: DGII,  
BUSINESS SURVEY

TABLE 2.5

Total industry:  
capacity utilisation  
rates  
(%)

	Annual growth rate: latest quarter, t / t-4	Second quarter 1995	Third quarter 1995	Fourth quarter 1995	First quarter 1996
EUR12	-0.7	83.1	83.2	82.6	81.8
B	-1.3	81.3	81.2	80.2	78.7
DK	-2.4	82.0	83.0	82.0	81.0
D	-1.1	85.1	86.1	84.7	83.2
GR	0.8	75.2	76.5	78.3	76.3
E	-1.0	78.6	77.9	77.8	77.5
F	-1.4	85.7	85.5	85.8	84.4
IRL	6.3	80.9	79.2	82.2	82.1
I	1.2	78.2	78.6	77.6	78.5
L	-4.5	83.2	83.4	81.6	78.8
NL	0.7	84.4	85.1	84.2	83.6
A	N/A	N/A	N/A	N/A	N/A
P	-1.4	78.3	78.5	78.6	77.0
FIN	N/A	N/A	N/A	N/A	N/A
S	N/A	N/A	N/A	N/A	N/A
UK	-1.4	85.2	84.1	83.8	82.9

SOURCE: DGII,  
BUSINESS SURVEY

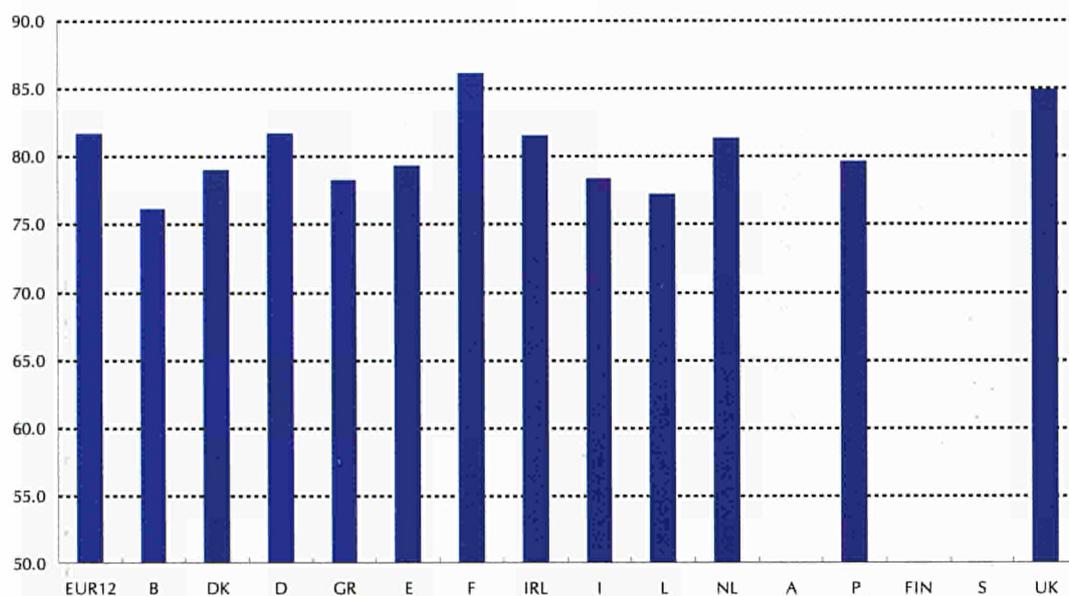


FIGURE 2.12

Intermediate goods:  
capacity utilisation  
rates, first quarter  
1996  
(%)

SOURCE: DGII,  
BUSINESS SURVEY

	Annual growth rate: latest quarter, t / t-4	Second quarter 1995	Third quarter 1995	Fourth quarter 1995	First quarter 1996
EUR12	-2.6	84.7	84.5	83.3	81.7
B	-6.6	85.3	84.0	80.4	76.1
DK	-3.7	81.0	81.0	80.0	79.0
D	-4.3	86.6	87.3	84.4	81.7
GR	1.3	78.2	78.4	78.9	78.2
E	-1.0	81.6	79.4	78.7	79.3
F	-1.5	87.8	88.4	87.4	86.1
IRL	1.5	83.8	74.1	83.2	81.5
I	-1.1	79.6	79.3	78.4	78.3
L	-5.0	82.0	82.7	80.6	77.1
NL	-3.2	85.4	85.4	82.7	81.3
A	N/A	N/A	N/A	N/A	N/A
P	-3.4	82.2	81.7	80.4	79.5
FIN	N/A	N/A	N/A	N/A	N/A
S	N/A	N/A	N/A	N/A	N/A
UK	-0.7	85.7	85.1	86.0	84.8

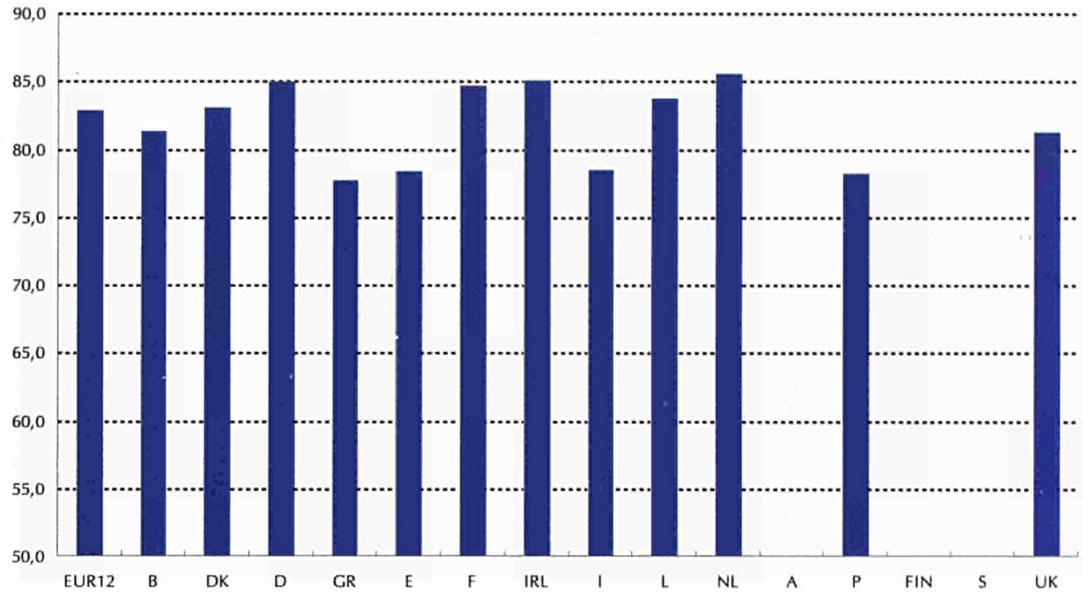
TABLE 2.6

Intermediate goods:  
capacity utilisation  
rates  
(%)

SOURCE: DGII,  
BUSINESS SURVEY

FIGURE 2.13

Capital goods:  
capacity utilisation  
rates, first quarter  
1996  
(%)



SOURCE: DGII,  
BUSINESS SURVEY

TABLE 2.7

Capital goods:  
capacity utilisation  
rates  
(%)

	Annual growth rate: latest quarter, t / t-4	Second quarter 1995	Third quarter 1995	Fourth quarter 1995	First quarter 1996
EUR12	2.1	82.1	82.8	83.0	82.8
B	2.7	80.0	81.8	81.6	81.3
DK	-2.4	85.0	85.0	85.0	83.0
D	4.6	82.6	85.5	85.3	84.9
GR	3.3	79.0	80.4	85.3	77.7
E	2.6	77.9	76.2	80.5	78.3
F	-3.4	85.4	82.2	85.7	84.6
IRL	10.7	85.4	83.3	81.2	85.0
I	3.0	77.7	79.5	77.2	78.4
L	1.1	84.7	84.1	85.5	83.7
NL	4.3	82.1	84.2	85.8	85.5
A	N/A	N/A	N/A	N/A	N/A
P	5.1	74.0	75.1	77.7	78.1
FIN	N/A	N/A	N/A	N/A	N/A
S	N/A	N/A	N/A	N/A	N/A
UK	0.0	83.6	82.9	81.4	81.2

SOURCE: DGII,  
BUSINESS SURVEY

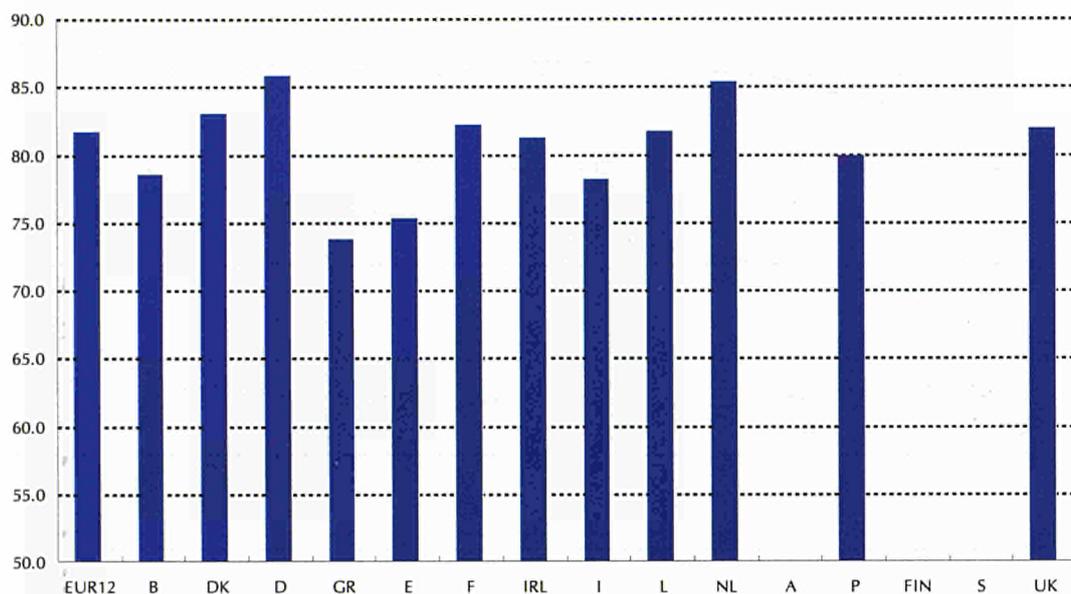


FIGURE 2.14

Consumer goods:  
capacity utilisation  
rates, first quarter  
1996  
(%)

SOURCE: DGII,  
BUSINESS SURVEY

	Annual growth rate: latest quarter, t / t-4	Second quarter 1995	Third quarter 1995	Fourth quarter 1995	First quarter 1996
EUR12	0.3	81.7	81.6	81.3	81.7
B	0.5	78.0	77.6	79.0	78.5
DK	0.0	82.0	83.0	82.0	83.0
D	-0.1	86.4	84.9	85.4	85.8
GR	0.3	70.9	73.3	76.9	73.7
E	-2.7	75.8	77.0	75.6	75.3
F	-0.6	83.3	83.8	83.9	82.2
IRL	1.8	75.4	82.7	81.7	81.2
I	2.4	76.5	77.2	76.4	78.1
L	-6.2	86.8	85.7	82.8	81.7
NL	1.5	84.7	85.4	85.1	85.3
A	N/A	N/A	N/A	N/A	N/A
P	-1.0	79.1	79.2	78.7	79.9
FIN	N/A	N/A	N/A	N/A	N/A
S	N/A	N/A	N/A	N/A	N/A
UK	-2.4	85.1	83.4	82.7	81.9

TABLE 2.8

Consumer goods:  
capacity utilisation  
rates  
(%)

SOURCE: DGII,  
BUSINESS SURVEY

FIGURE 2.15

Trade indicators,  
trend cycle  
(1990 = 100)

— Export value  
— Import value  
- - - Terms of trade

SOURCE:  eurostat

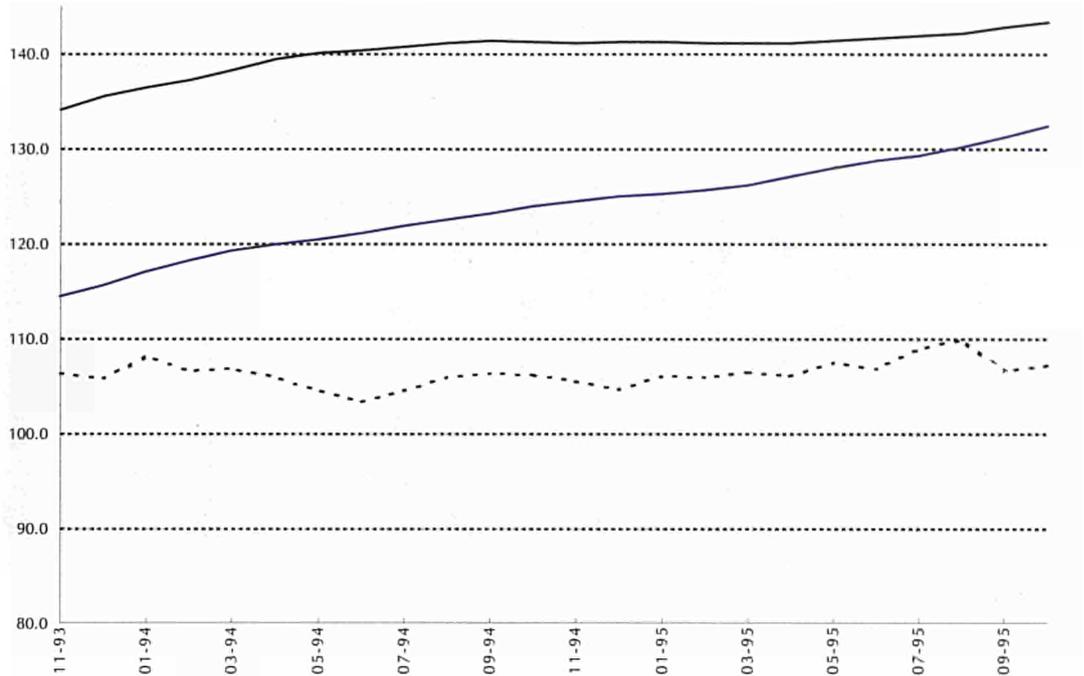


TABLE 2.9

Three month on three  
month growth rates  
for trade indicators,  
in ECU terms  
(%)

SOURCE:  eurostat

	Latest quarter available		Exports		Imports		Terms of trade	
			Value	Volume	Value	Volume		
EUR12	08-95	⇄	10-95	0.7	0.1	1.5	0.3	0.1
B / L	06-95	⇄	08-95	-1.4	-2.8	-1.6	-2.6	-0.2
DK	06-95	⇄	08-95	-2.6	-1.1	-0.5	4.3	-1.0
D	06-95	⇄	08-95	-0.6	0.3	0.1	-0.3	0.8
GR	06-95	⇄	08-95	12.8	10.7	3.9	2.7	0.9
E	06-95	⇄	08-95	-0.1	-0.4	-2.8	-0.5	0.2
F	06-95	⇄	08-95	0.1	-1.6	0.2	-0.1	0.6
IRL	05-95	⇄	07-95	2.9	0.4	6.2	4.3	2.5
I	06-95	⇄	08-95	7.0	4.1	7.0	4.6	0.1
NL	06-95	⇄	08-95	-11.4	-8.9	-13.6	-12.1	2.5
A		⇄		N/A	N/A	N/A	N/A	N/A
P	06-95	⇄	08-95	-3.6	1.4	-2.1	-2.2	0.2
FIN		⇄		N/A	N/A	N/A	N/A	N/A
S		⇄		N/A	N/A	N/A	N/A	N/A
UK	06-95	⇄	08-95	2.2	-0.8	4.4	0.8	0.9

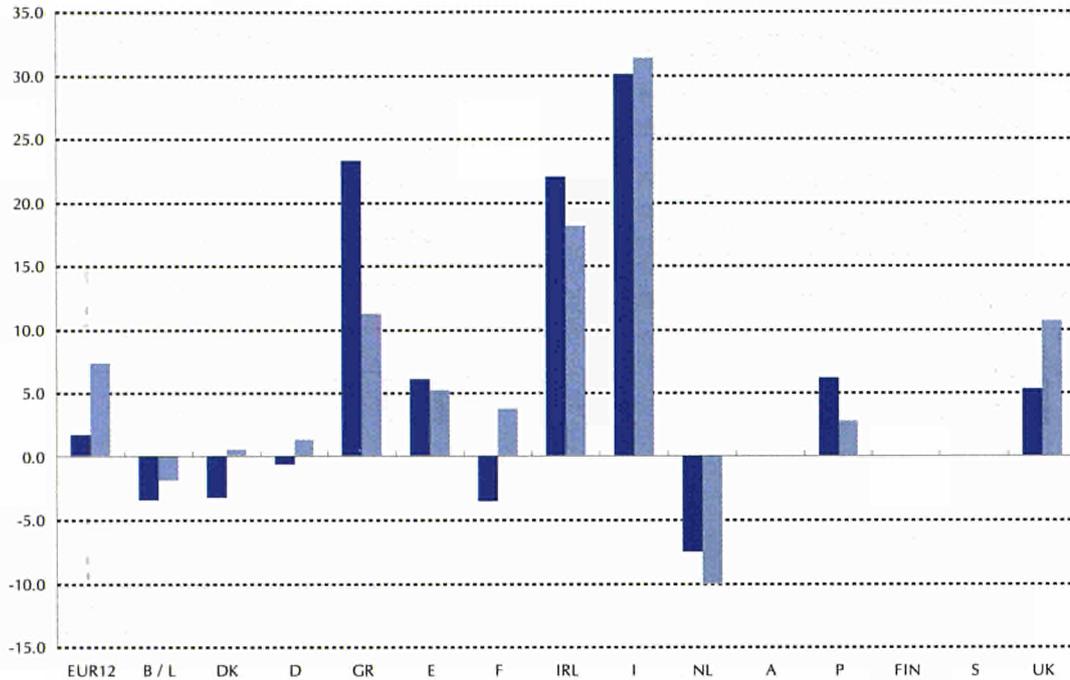


FIGURE 2.16

Year on year growth rates for trade indicators, based on changes from the corresponding quarter of the previous year, in ECU terms (%)

■ Export value  
■ Import value

SOURCE: eurostat

	Latest quarter available		Exports		Imports		Terms of trade	
	Value	Volume	Value	Volume				
EUR12	08-95	⇌	10-95	1.6	-2.5	7.2	4.5	1.7
B / L	06-95	⇌	08-95	-3.5	-8.6	-2.0	-7.6	-0.4
DK	06-95	⇌	08-95	-3.3	-3.3	0.4	-1.3	-1.8
D	06-95	⇌	08-95	-0.7	-4.1	1.2	0.0	2.3
GR	06-95	⇌	08-95	23.2	12.2	11.1	0.7	-0.5
E	06-95	⇌	08-95	6.0	-2.0	5.1	-3.0	-0.3
F	06-95	⇌	08-95	-3.7	-8.9	3.7	-0.9	1.2
IRL	05-95	⇌	07-95	21.9	16.0	18.0	11.1	-1.2
I	06-95	⇌	08-95	30.0	12.0	31.2	10.4	-1.9
NL	06-95	⇌	08-95	-7.7	-13.7	-10.2	-11.0	6.0
A		⇌		N/A	N/A	N/A	N/A	N/A
P	06-95	⇌	08-95	6.1	-0.4	2.7	-2.7	1.0
FIN		⇌		N/A	N/A	N/A	N/A	N/A
S		⇌		N/A	N/A	N/A	N/A	N/A
UK	06-95	⇌	08-95	5.2	-4.5	10.5	-1.1	-1.5

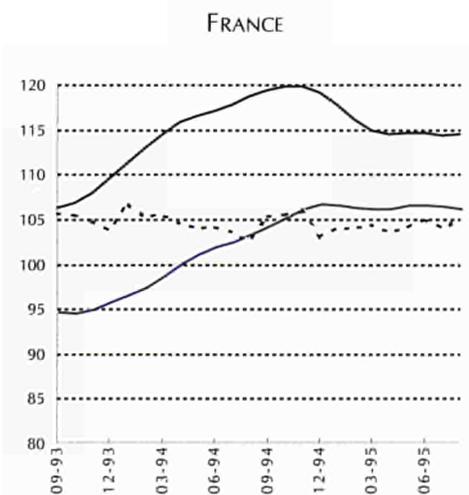
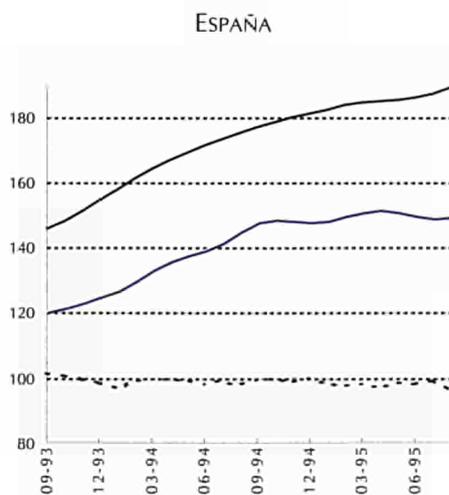
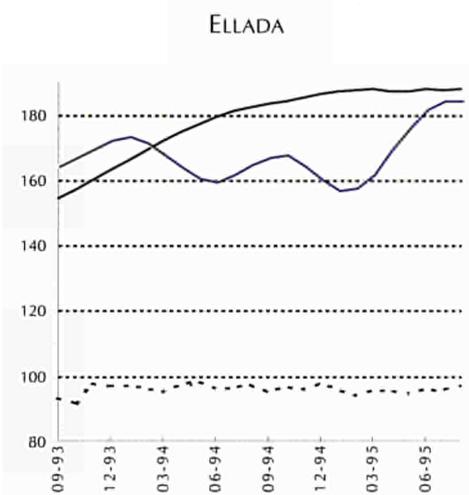
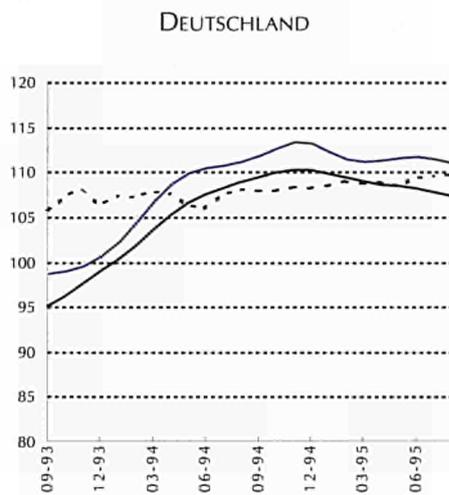
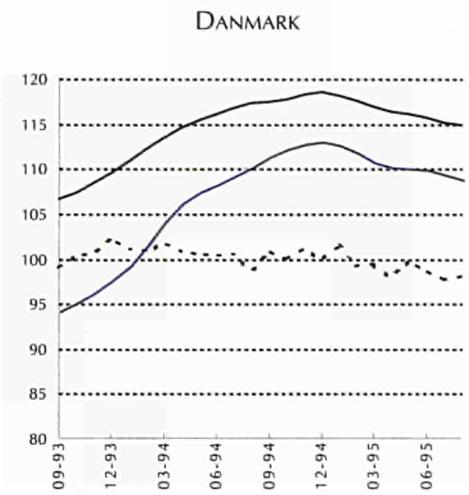
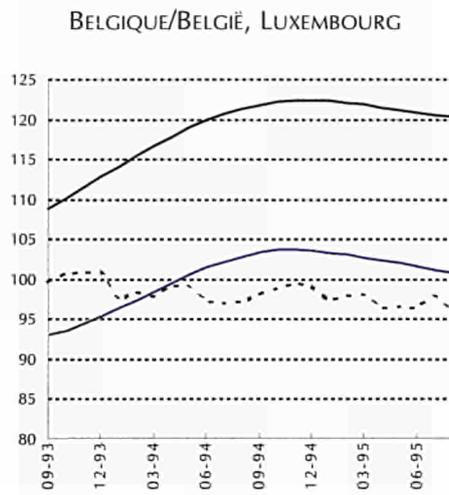
TABLE 2.10

Year on year growth rates for trade indicators, based on changes from the corresponding quarter of the previous year, in ECU terms (%)

SOURCE: eurostat

FIGURE 2.17

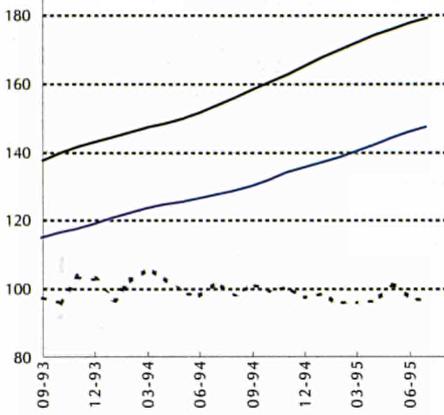
Trade indicators by goods sector, trend-cycle (1990 = 100)



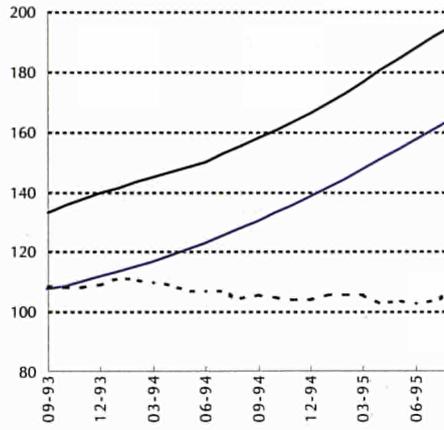
— Export value  
— Import value  
- - - Terms of trade

SOURCE: eurostat

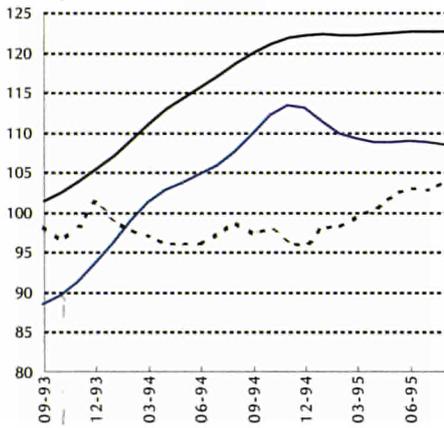
IRELAND



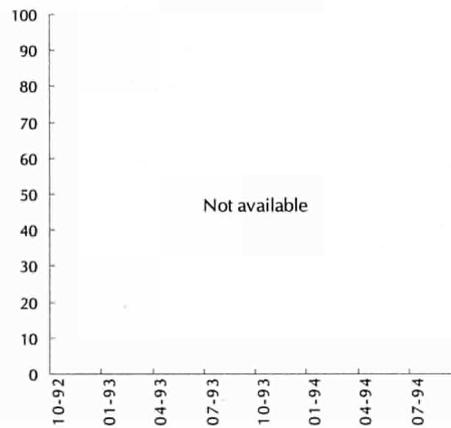
ITALIA



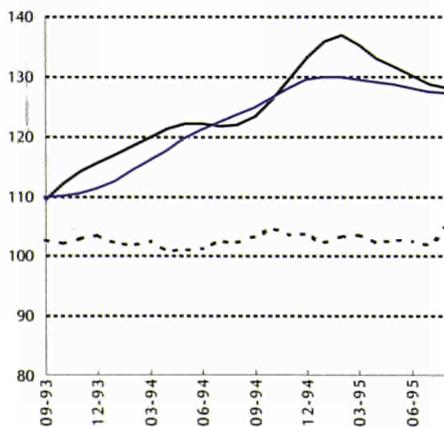
NEDERLAND



ÖSTERREICH



PORTUGAL



SUOMI/FINLAND

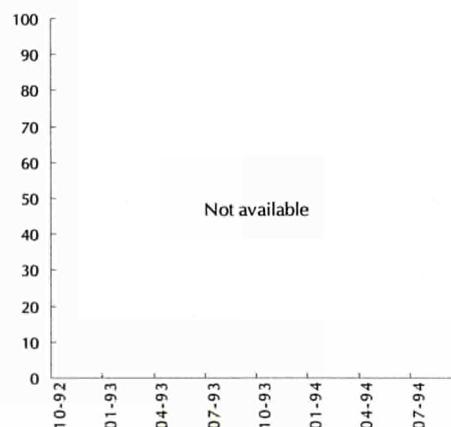


FIGURE 2.17

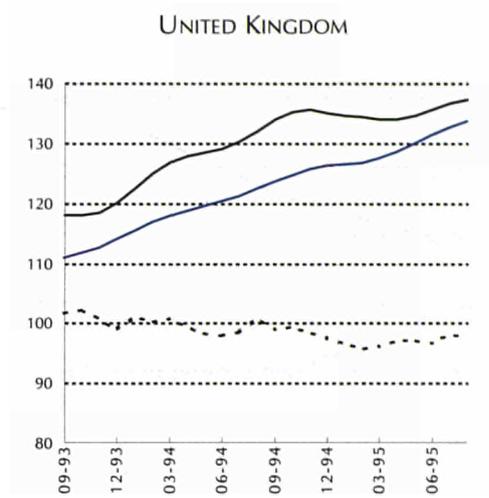
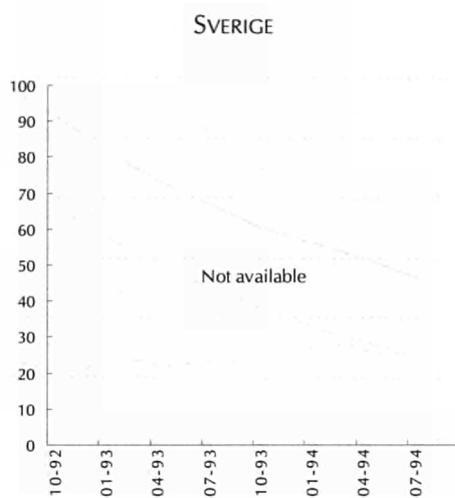
Trade indicators  
by goods sector,  
trend-cycle  
(1990 = 100)

- Export value
- Import value
- - - Terms of trade

SOURCE:  eurostat

FIGURE 2.17

Trade indicators by goods sector, trend-cycle (1990 = 100)



- Export value
- Import value
- - - Terms of trade

SOURCE: eurostat

The European Union is the world's leading producer in the food, drink and tobacco industry, coming ahead of the United States, whose production in 1994 was 78.5% of the Community's, i.e. ECU 374.6 billion. Japan's production was ECU 297.1 billion, which was less than domestic consumption. This sector, which is largely unaffected by cyclical variations, accounted for 16.5% of the Community's total industrial production in 1995, making it the leading industrial sector in order of production - ECU 484.7 billion, which was 1.5% up on 1994 in current prices and 1.1% up in constant prices.



Demand is saturated, so growth rates for the industry are relatively stable. Between 1985 and 1994, the real annual growth rate of production was 2.5%. In October 1995, the utilization percentage was 80.5% for the European Union as a whole, and 75.6%, 83.7% and 69.6% for Belgium, Germany and Spain respectively. In 1995, the volume of production rose by 0.4% at European level - increases were recorded in Italy, Sweden and Greece (4.7%, 2.3% and 2.9% respectively), stagnation in France, and decreases in Austria, the United Kingdom and Denmark (7.7%, 0.5% and 4.9% respectively). The rate of growth of production has thus slowed - between June 1994 and June 1995, the volume increase in production was 2.0% for EUR 15. The share of the food, drink and tobacco sector as a percentage of industry as a whole varies from country to country. In 1995, for example, it was 37.0% in Ireland, 32.3% in Denmark, 31.6% in Greece, 21.5% in Portugal and 11.9% in Germany. The corresponding figures for the United States (1994) and Japan (1995) were 13.6% and 10.9% respectively. Meat, the largest subsector, accounted for 16.8% of total Community production in the food, drink and tobacco sector in 1995, compared with 16.2% in 1985. In 1994, the European Union was the world's second largest producer of meat behind the United States. International comparisons show a fall in production in Eastern Europe following the reduction in subsidies, whereas in China production is increasing, making this country the world's leading producer of pork. At Community level, the main producers of meat are France and Germany, which accounted for 27.6% and 15.2% of Community production respectively in 1995. However, different countries specialize to a greater or lesser extent in certain types of animal production - e.g. pigs in Denmark, cattle in Italy, sheep and goats in Spain and poultry in the United Kingdom. The milk products subsector accounted for 16.4% of Community production in 1995 (compared with 16.0% in 1985), putting it in second place in order of production. It is followed by tobacco (9.2%), compound feedingstuffs for animals (6.1%, compared with 7.4% ten years earlier), the bakery industry (5.9%, compared with 5.0% in 1985) and brewing and malting (5.6%, compared with 6.0% ten years earlier). The most significant changes were for oils and fats (whose share fell from 5.4% in 1985 to 4.0% in 1995) and sugar

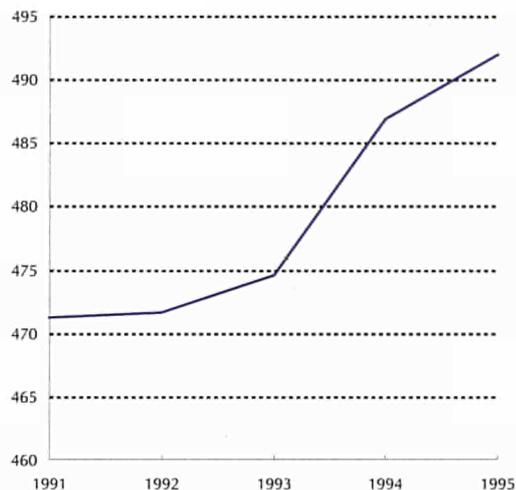
This sector accounted for 16.5% of total Community industrial production in 1995.

**IN THIS SECTION:**

COMMENTARY	33
STRUCTURAL INDICATORS	37
SHORT-TERM INDICATORS	40

FIGURE 3.1.1

EUR15 production in constant prices (billion ECU)

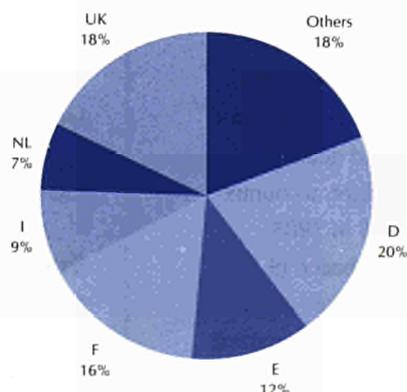


SOURCE: DEBA GEIE

(4.2% to 3.4%). There was also a relative fall in the production of alcoholic beverages as a whole (wine, beer, alcohol and spirits), from 11.6% to 10.6%, whilst the share of soft drinks increased by 1.3 percentage points to its current level of 4.1%. Apparent consumption increased by 4.0% between 1993 and 1994. Over the past decade, trends in consumption and production have been more or less in phase. Meat heads the table for expenditure on food, though consumption of meat is traditionally higher in France and Belgium than in the Netherlands or Greece, figures for the Netherlands and France being 12.5% and 24.7% respectively. Second place is held by milk products, the share allocated to them in the food budget being relatively higher in France and Ireland – 21.4% and 24.9% of the total basket respectively

FIGURE 3.1.2

Share of value-added at factor cost, 1995 (%)

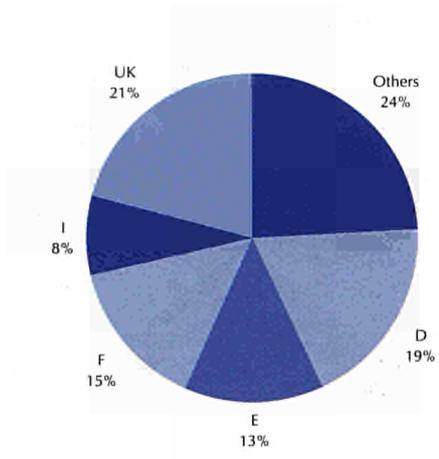


SOURCE: DEBA GEIE

– and lower in Spain (10.5%) and the United Kingdom (10.9%). The consumption of processed sea food is rising steadily. For example, there was a 5.6% increase between 1994 and 1995. This is partly due to the growing sophistication of products and to their nutritional appeal. Generally speaking, consumers are concerned about their well-being and are turning increasingly towards convenience products, i.e. those with more value added. However, at the same time, discount stores are proving highly successful, particularly in the field of non-perishables and in northern Europe. Furthermore, the consumption of fats and oils is falling in all countries (except Portugal), and there is a downward trend in sugar consumption. However, in 1994, the share of oils and fats was highest in Spain (9.9%) and lowest in Ireland (3.0%).

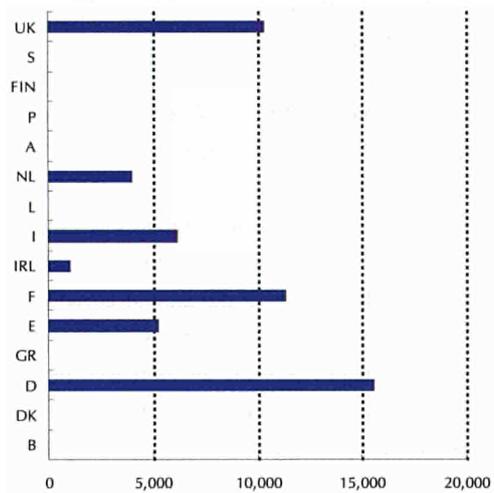
Although national preferences for certain beverages are still evident, the trend is towards uniform consumption patterns across Europe, particularly in the field of wine, where differences between northern and southern Europe are evening out. Thus, consumption of wine is rising in northern Europe, whilst beer is becoming increasingly popular in the Mediterranean countries. Furthermore, whilst the consumption of alcoholic beverages fell by an average of 0.5% per year between 1991 and 1994, consumption of mineral waters and soft drinks increased by 3.1% per year. In per-capita terms, the Italians are Europe's leading consumers of mineral water, ahead of the Belgians and Germans, whilst the consumption of soft drinks in the United Kingdom rose from 2.6% in 1985 to 4.1% in 1994. In 1994, consumption of alcohol as a portion of overall sectoral consumption ranged from 0.2% in the United Kingdom to 3.0% in Spain, and for beer from 1.7% in Italy to 8.3% in Germany. For the latter country, consumption of soft drinks increased by 1.5 percentage points (to 4.8%) between 1985 and 1994, whilst consumption of wine increased from 1.2% to 1.6%.

Community employment in this sector fell by 1.7% between 1994 and 1995, currently totalling 2.3 million persons or 11.7% of the population actively employed in European industry - as against 10.6% ten years earlier. Furthermore, the figure fell by an average of 1.0% per year between 1990 and 1995. Employment in the alcohol and spirits subsector fell by an average of 2.6% per year over the same period, whilst the bakery industry saw stagnation. The bakery subsector employs 19.5% of the sector's total active population (accounting for 5.9% of production and 11.0% of value added), meat 18.6% and milk products 10.7%. The main Community companies in the sector are Unilever (Netherlands/United Kingdom), B.A.T. Industries (United Kingdom), Hanson (United Kingdom), Ferruzzi (Italy) and Danone (France), whilst the world's three leading groups are Philip Morris (USA), Nestlé (Switzerland) and Pepsico (USA). Generally speaking, the food, drink and tobacco sector comprises a large number of small enterprises with low turnover. Businesses with more than 100 employees account for 1.7% of the total number of enterprises but 51.8% of total employment and over two-thirds of total turnover. In 1992, 92.4% of enterprises employed fewer than 20 people. Furthermore, in the field of industrial strategy, most mergers and acquisitions are horizontal, the aim being to capture a larger share of the market, be it national or continental. Faced with stagnant consumption in European and the United States, multinationals in the food, drink and tobacco sector are looking to conquer markets in emerging countries, i.e. countries and regions with fastest growth, such as Asia, Latin American and Central Europe. Simultaneously they are turning increasingly to acquisitions, thus accelerating the pace of concentration. They are buying out their competitors to take over their brand names and win new market shares. Subsequent brand selection means that only those that are best known worldwide survive. This strategy saves time and avoids the need for innovation, the success of which is far from certain.



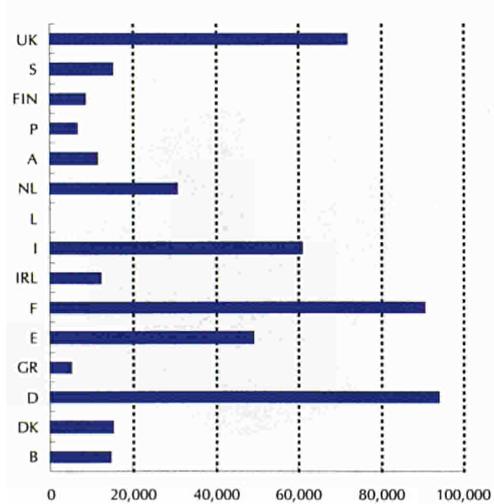
**FIGURE 3.1.3**  
Share of number of employees, 1995 (%)

SOURCE: DEBA GEIE



**FIGURE 3.1.4**  
Labour costs, 1994 (million ECU)

SOURCE: DEBA GEIE

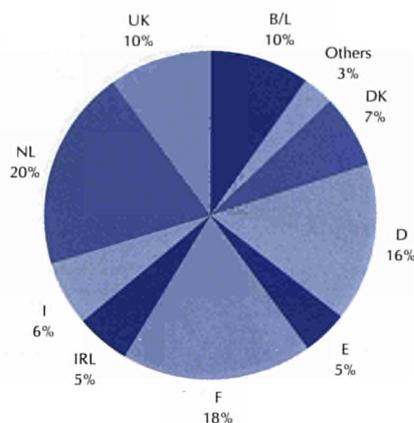


**FIGURE 3.1.5**  
Production in constant prices, 1995 (million ECU)

SOURCE: DEBA GEIE

FIGURE 3.1.6

Share of world exports, 1994 (%)



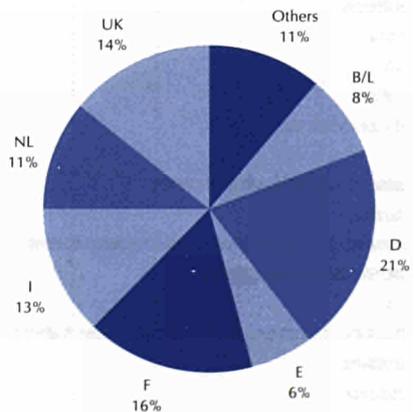
SOURCE: eurostat

Germany (0.7%), France (0.3%) and the Netherlands (0.4%). They rose by a full 3.9% in Denmark and 5.4% in Spain, but fell by 10.4% in Finland.

Over the past 12 months, employment in EUR 15 was down 2.1% by the end of March 1995, 2.0% by the end of June and 3.1% by the end of September. National growth rates by the latter date were negative: -1.9% in Germany and -0.5% in France, with much more marked falls in the United Kingdom, Portugal and Austria (10.1%, 9.3% and 6.1% respectively). Japan saw employment grow by 2.2% between September 1994 and September 1995, whereas the annual growth rate of employment in the United States was 0.6% in June 1995. Wages and salaries increased by 9.2% in Germany between September 1994 and September 1995, and by 1.5%, 4.3% and 4.8% in France, Spain and Italy over the same period. However, they fell by 6.3% in Austria. At the same time, producer prices rose slightly in

FIGURE 3.1.7

Share of world imports, 1994 (%)



SOURCE: eurostat

TABLE 3.1.1

Value-added at  
factor cost  
(million ECU)

	1991	t / t-1 (%)	1992	t / t-1 (%)	1993	t / t-1 (%)	1994	t / t-1 (%)	1995	t / t-1 (%)
EUR15	109901.9	6.2	112791.7	2.6	113206.2	0.4	118679.2	4.8	120099.5	1.2
B	1922.8	-1.0	2066.6	7.5	2068.9	0.1	2225.5	7.6	2335.7	5.0
share (%)	1.7		1.8		1.8		1.9		1.9	
DK	3568.3	15.9	3657.4	2.5	3656.4	0.0	4106.8	12.3	4360.4	6.2
share (%)	3.2		3.2		3.2		3.5		3.6	
D	21590.7	13.0	22314.5	3.4	23591.2	5.7	23875.5	1.2	24670.8	3.3
share (%)	19.6		19.8		20.8		20.1		20.5	
GR	917.0	11.3	939.8	2.5	1035.8	10.2	1146.5	10.7	1232.1	7.5
share (%)	0.8		0.8		0.9		1.0		1.0	
E	13172.7	8.9	13731.2	4.2	12976.1	-5.5	13910.0	7.2	13915.2	0.0
share (%)	12.0		12.2		11.5		11.7		11.6	
F	16735.4	3.6	17357.7	3.7	17514.0	0.9	18168.7	3.7	18742.3	3.2
share (%)	15.2		15.4		15.5		15.3		15.6	
IRL	2808.7	8.5	3062.9	9.1	3233.9	5.6	3610.6	11.6	4041.0	11.9
share (%)	2.6		2.7		2.9		3.0		3.4	
I	11595.3	10.1	11717.0	1.0	10630.5	-9.3	10937.1	2.9	10489.1	-4.1
share (%)	10.6		10.4		9.4		9.2		8.7	
L	149.1	4.4	161.1	8.0	165.5	2.7	173.5	4.8	180.0	3.7
share (%)	0.1		0.1		0.1		0.1		0.1	
NL	6453.5	7.3	6870.2	6.5	7263.0	5.7	7686.0	5.8	8133.8	5.8
share (%)	5.9		6.1		6.4		6.5		6.8	
A	3787.3	5.7	4000.1	5.6	4054.3	1.4	4146.8	2.3	3777.3	-8.9
share (%)	3.4		3.5		3.6		3.5		3.1	
P	993.6	-22.7	1151.5	15.9	1091.3	-5.2	1136.5	4.1	1228.0	8.1
share (%)	0.9		1.0		1.0		1.0		1.0	
FIN	2761.6	2.9	2250.8	-18.5	2330.3	3.5	2399.8	3.0	2203.5	-8.2
share (%)	2.5		2.0		2.1		2.0		1.8	
S	3074.1	-25.4	3206.0	4.3	3322.0	3.6	3524.3	6.1	3592.2	1.9
share (%)	2.8		2.8		2.9		3.0		3.0	
UK	20371.7	5.4	20304.9	-0.3	20273.2	-0.2	21631.3	6.7	21198.2	-2.0
share (%)	18.5		18.0		17.9		18.2		17.7	

SOURCE: DEBA GEIE

TABLE 3.1.2

Production in  
current prices  
(million ECU)

	1991	t / t-1 (%)	1992	t / t-1 (%)	1993	t / t-1 (%)	1994	t / t-1 (%)	1995	t / t-1 (%)
EUR15	483305.1	6.4	495134.5	2.4	495972.2	0.2	515414.4	3.9	521081.4	1.1
B	14960.8	6.1	15728.8	5.1	15823.3	0.6	16735.4	5.8	17421.9	4.1
share (%)	3.1		3.2		3.2		3.2		3.3	
DK	13821.0	0.6	14790.6	7.0	14485.3	-2.1	15984.7	10.4	16829.4	5.3
share (%)	2.9		3.0		2.9		3.1		3.2	
D	97607.1	10.5	101247.2	3.7	103662.7	2.4	105780.8	2.0	109666.2	3.7
share (%)	20.2		20.4		20.9		20.5		21.0	
GR	5283.1	5.6	5271.7	-0.2	5782.8	9.7	6248.2	8.0	6672.1	6.8
share (%)	1.1		1.1		1.2		1.2		1.3	
E	47558.7	7.1	48307.6	1.6	45673.8	-5.5	47978.3	5.0	47491.5	-1.0
share (%)	9.8		9.8		9.2		9.3		9.1	
F	82886.4	3.5	86868.3	4.8	90472.4	4.1	93082.8	2.9	96335.2	3.5
share (%)	17.1		17.5		18.2		18.1		18.5	
IRL	10589.9	6.6	11323.0	6.9	11396.4	0.6	12069.7	5.9	13127.6	8.8
share (%)	2.2		2.3		2.3		2.3		2.5	
I	60530.1	7.5	60888.6	0.6	55442.0	-8.9	56349.2	1.6	53718.7	-4.7
share (%)	12.5		12.3		11.2		10.9		10.3	
L	404.8	1.8	428.1	5.8	432.8	1.1	443.4	2.4	456.1	2.9
share (%)	0.1		0.1		0.1		0.1		0.1	
NL	29896.1	2.2	32293.2	8.0	33806.9	4.7	35092.9	3.8	36854.0	5.0
share (%)	6.2		6.5		6.8		6.8		7.1	
A	11713.8	5.2	12414.6	6.0	12596.5	1.5	12941.5	2.7	11695.8	-9.6
share (%)	2.4		2.5		2.5		2.5		2.2	
P	6944.0	10.0	7901.6	13.8	7728.8	-2.2	7535.9	-2.5	8064.7	7.0
share (%)	1.4		1.6		1.6		1.5		1.5	
FIN	10047.4	-3.4	8433.6	-16.1	8714.7	3.3	8987.2	3.1	8292.8	-7.7
share (%)	2.1		1.7		1.8		1.7		1.6	
S	14615.8	19.9	14626.3	0.1	15271.9	4.4	16124.9	5.6	16400.5	1.7
share (%)	3.0		3.0		3.1		3.1		3.1	
UK	76446.2	5.2	74611.3	-2.4	74681.8	0.1	80059.5	7.2	78055.0	-2.5
share (%)	15.8		15.1		15.1		15.5		15.0	

SOURCE: DEBA GEIE

TABLE 3.1.3

Number of employees  
(thousands)

	1991	t / t-1 (%)	1992	t / t-1 (%)	1993	t / t-1 (%)	1994	t / t-1 (%)	1995	t / t-1 (%)
<b>EUR15</b>	<b>2652998.0</b>	<b>0.5</b>	<b>2624806.4</b>	<b>-1.1</b>	<b>2567523.9</b>	<b>-2.2</b>	<b>2531781.1</b>	<b>-1.4</b>	<b>2487628.6</b>	<b>-1.7</b>
<b>B</b>	<b>71025.0</b>	<b>-2.3</b>	<b>68897.0</b>	<b>-3.0</b>	<b>66592.0</b>	<b>-3.3</b>	<b>65238.0</b>	<b>-2.0</b>	<b>66702.0</b>	<b>2.2</b>
share (%)	2.7		2.6		2.6		2.6		2.7	
<b>DK</b>	<b>67001.0</b>	<b>-0.2</b>	<b>66043.0</b>	<b>-1.4</b>	<b>64684.0</b>	<b>-2.1</b>	N/A	N/A	N/A	N/A
share (%)	2.5		2.5		2.5		N/A		N/A	
<b>D</b>	<b>522124.0</b>	<b>5.9</b>	<b>516120.0</b>	<b>-1.1</b>	<b>499028.0</b>	<b>-3.3</b>	<b>484996.0</b>	<b>-2.8</b>	<b>474286.0</b>	<b>-2.2</b>
share (%)	19.7		19.7		19.4		19.2		19.1	
<b>GR</b>	<b>57128.0</b>	<b>-2.7</b>	<b>57215.0</b>	<b>0.2</b>	<b>56987.0</b>	<b>-0.4</b>	<b>56917.0</b>	<b>-0.1</b>	<b>54150.0</b>	<b>-4.9</b>
share (%)	2.2		2.2		2.2		2.2		2.2	
<b>E</b>	<b>362450.0</b>	<b>0.1</b>	<b>357145.0</b>	<b>-1.5</b>	<b>357431.0</b>	<b>0.1</b>	<b>351994.0</b>	<b>-1.5</b>	<b>332666.0</b>	<b>-5.5</b>
share (%)	13.7		13.6		13.9		13.9		13.4	
<b>F</b>	<b>356879.0</b>	<b>0.8</b>	<b>370369.0</b>	<b>3.8</b>	<b>366822.0</b>	<b>-1.0</b>	<b>367159.0</b>	<b>0.1</b>	<b>361315.0</b>	<b>-1.6</b>
share (%)	13.5		14.1		14.3		14.5		14.5	
<b>IRL</b>	<b>42078.0</b>	<b>-0.1</b>	<b>42327.0</b>	<b>0.6</b>	<b>44175.0</b>	<b>4.4</b>	<b>43370.0</b>	<b>-1.8</b>	<b>43046.0</b>	<b>-0.7</b>
share (%)	1.6		1.6		1.7		1.7		1.7	
<b>I</b>	<b>226074.0</b>	<b>-1.6</b>	<b>219906.0</b>	<b>-2.7</b>	<b>215791.0</b>	<b>-1.9</b>	<b>207678.0</b>	<b>-3.8</b>	<b>201872.0</b>	<b>-2.8</b>
share (%)	8.5		8.4		8.4		8.2		8.1	
<b>L</b>	<b>2583.0</b>	<b>1.7</b>	<b>2660.0</b>	<b>3.0</b>	<b>2595.0</b>	<b>-2.4</b>	<b>2580.0</b>	<b>-0.6</b>	<b>2837.0</b>	<b>10.0</b>
share (%)	0.1		0.1		0.1		0.1		0.1	
<b>NL</b>	<b>128287.0</b>	<b>2.1</b>	<b>130793.0</b>	<b>2.0</b>	<b>128863.0</b>	<b>-1.5</b>	<b>124852.0</b>	<b>-3.1</b>	N/A	N/A
share (%)	4.8		5.0		5.0		4.9		N/A	
<b>A</b>	<b>65400.0</b>	<b>-2.2</b>	<b>64196.4</b>	<b>-1.8</b>	<b>61263.4</b>	<b>-4.6</b>	<b>60238.7</b>	<b>-1.7</b>	<b>58508.7</b>	<b>-2.9</b>
share (%)	2.5		2.4		2.4		2.4		2.4	
<b>P</b>	<b>90867.0</b>	<b>0.8</b>	<b>89705.0</b>	<b>-1.3</b>	<b>81222.0</b>	<b>-9.5</b>	<b>84600.0</b>	<b>4.2</b>	N/A	N/A
share (%)	3.4		3.4		3.2		3.3		N/A	
<b>FIN</b>	<b>51100.0</b>	<b>-3.9</b>	<b>47400.0</b>	<b>-7.2</b>	<b>43933.7</b>	<b>-7.3</b>	<b>39362.4</b>	<b>-10.4</b>	<b>37615.0</b>	<b>-4.4</b>
share (%)	1.9		1.8		1.7		1.6		1.5	
<b>S</b>	<b>68800.0</b>	<b>2.1</b>	<b>64500.0</b>	<b>-6.3</b>	<b>60069.9</b>	<b>-6.9</b>	<b>61363.0</b>	<b>2.2</b>	<b>60162.0</b>	<b>-2.0</b>
share (%)	2.6		2.5		2.3		2.4		2.4	
<b>UK</b>	<b>541202.0</b>	<b>-2.2</b>	<b>527530.0</b>	<b>-2.5</b>	<b>518067.0</b>	<b>-1.8</b>	<b>517853.0</b>	<b>0.0</b>	<b>518258.0</b>	<b>0.1</b>
share (%)	20.4		20.1		20.2		20.5		20.8	

SOURCE: DEBA GEIE

TABLE 3.1.4

Labour costs  
(million ECU)

	1990	t / t-1 (%)	1991	t / t-1 (%)	1992	t / t-1 (%)	1993	t / t-1 (%)	1994	t / t-1 (%)
<b>EUR12</b>	<b>52865.1</b>	<b>7.5</b>	<b>57406.7</b>	<b>8.6</b>	<b>59507.6</b>	<b>3.7</b>	<b>59640.2</b>	<b>0.2</b>	<b>60110.2</b>	<b>0.8</b>
<b>B</b>	<b>2038.6</b>	<b>13.4</b>	<b>2093.3</b>	<b>2.7</b>	<b>2105.3</b>	<b>0.6</b>	<b>2127.6</b>	<b>1.1</b>	N/A	N/A
share (%)	3.9		3.6		3.5		3.6		N/A	
<b>DK</b>	<b>1795.5</b>	<b>6.5</b>	<b>1847.3</b>	<b>2.9</b>	<b>1902.2</b>	<b>3.0</b>	<b>1938.1</b>	<b>1.9</b>	N/A	N/A
share (%)	3.4		3.2		3.2		3.2		N/A	
<b>D</b>	<b>12347.0</b>	<b>10.2</b>	<b>13987.6</b>	<b>13.3</b>	<b>14906.5</b>	<b>6.6</b>	<b>15637.9</b>	<b>4.9</b>	<b>15631.4</b>	<b>0.0</b>
share (%)	23.4		24.4		25.0		26.2		26.0	
<b>GR</b>	<b>667.8</b>	<b>7.4</b>	<b>695.7</b>	<b>4.2</b>	<b>772.1</b>	<b>11.0</b>	<b>814.9</b>	<b>5.5</b>	N/A	N/A
share (%)	1.3		1.2		1.3		1.4		N/A	
<b>E</b>	<b>5209.9</b>	<b>9.2</b>	<b>5654.0</b>	<b>8.5</b>	<b>5895.7</b>	<b>4.3</b>	<b>5558.1</b>	<b>-5.7</b>	<b>5315.5</b>	<b>-4.4</b>
share (%)	9.9		9.8		9.9		9.3		8.8	
<b>F</b>	<b>9702.3</b>	<b>6.0</b>	<b>10053.6</b>	<b>3.6</b>	<b>10592.3</b>	<b>5.4</b>	<b>11103.4</b>	<b>4.8</b>	<b>11424.3</b>	<b>2.9</b>
share (%)	18.4		17.5		17.8		18.6		19.0	
<b>IRL</b>	<b>942.2</b>	<b>6.9</b>	<b>990.9</b>	<b>5.2</b>	<b>1040.3</b>	<b>5.0</b>	<b>1071.5</b>	<b>3.0</b>	<b>1109.5</b>	<b>3.5</b>
share (%)	1.8		1.7		1.7		1.8		1.8	
<b>I</b>	<b>6463.9</b>	<b>8.4</b>	<b>7206.3</b>	<b>11.5</b>	<b>7351.2</b>	<b>2.0</b>	<b>6451.9</b>	<b>-12.2</b>	<b>6209.4</b>	<b>-3.8</b>
share (%)	12.2		12.6		12.4		10.8		10.3	
<b>L</b>	<b>52.0</b>	<b>15.8</b>	<b>56.7</b>	<b>9.0</b>	<b>60.0</b>	<b>5.8</b>	<b>63.0</b>	<b>5.0</b>	<b>64.2</b>	<b>1.9</b>
share (%)	0.1		0.1		0.1		0.1		0.1	
<b>NL</b>	<b>3416.5</b>	<b>6.3</b>	<b>3606.4</b>	<b>5.6</b>	<b>3797.6</b>	<b>5.3</b>	<b>4036.2</b>	<b>6.3</b>	<b>4037.2</b>	<b>0.0</b>
share (%)	6.5		6.3		6.4		6.8		6.7	
<b>A</b>	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
share (%)	N/A		N/A		N/A		N/A		N/A	
<b>P</b>	<b>656.6</b>	<b>50.4</b>	<b>801.7</b>	<b>22.1</b>	<b>934.0</b>	<b>16.5</b>	<b>840.4</b>	<b>-10.0</b>	N/A	N/A
share (%)	1.2		1.4		1.6		1.4		N/A	
<b>FIN</b>	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
share (%)	N/A		N/A		N/A		N/A		N/A	
<b>S</b>	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
share (%)	N/A		N/A		N/A		N/A		N/A	
<b>UK</b>	<b>9572.8</b>	<b>1.6</b>	<b>10413.2</b>	<b>8.8</b>	<b>10150.4</b>	<b>-2.5</b>	<b>9997.2</b>	<b>-1.5</b>	<b>10367.5</b>	<b>3.7</b>
share (%)	18.1		18.1		17.1		16.8		17.2	

SOURCE: DEBA GEIE

TABLE 3.1.5

Extra-EUR12 exports  
(million ECU)

	1990	t/ t-1 (%)	1991	t/ t-1 (%)	1992	t/ t-1 (%)	1993	t/ t-1 (%)	1994	t/ t-1 (%)
EUR12	24977.1	-0.5	26057.7	4.3	27908.4	7.1	30768.2	10.2	33358.9	8.4
B / L	986.5	25.9	1187.4	20.4	1294.2	9.0	1420.7	9.8	2010.9	41.5
share (%)	3.9		4.6		4.6		4.6		6.0	
DK	2272.8	-5.3	2470.7	8.7	2429.3	-1.7	2771.3	14.1	3263.5	17.8
share (%)	9.1		9.5		8.7		9.0		9.8	
D	3995.5	6.6	4503.2	12.7	4528.6	0.6	5271.4	16.4	5940.7	12.7
share (%)	16.0		17.3		16.2		17.1		17.8	
GR	304.5	-2.3	322.6	5.9	425.5	31.9	435.3	2.3	485.7	11.6
share (%)	1.2		1.2		1.5		1.4		1.5	
E	1589.6	0.3	1679.1	5.6	1814.1	8.0	1987.7	9.6	2297.6	15.6
share (%)	6.4		6.4		6.5		6.5		6.9	
F	4999.7	4.1	5109.6	2.2	5405.4	5.8	5698.7	5.4	6220.5	9.2
share (%)	20.0		19.6		19.4		18.5		18.6	
IRL	1106.8	-13.8	1012.2	-8.5	1203.8	18.9	1269.2	5.4	1433.5	12.9
share (%)	4.4		3.9		4.3		4.1		4.3	
I	1964.8	1.8	2056.3	4.7	2476.9	20.5	2570.2	3.8	2689.4	4.6
share (%)	7.9		7.9		8.9		8.4		8.1	
NL	3763.2	-16.2	3422.7	-9.0	3828.8	11.9	4605.4	20.3	4702.5	2.1
share (%)	15.1		13.1		13.7		15.0		14.1	
A	N/A	N/A								
share (%)	N/A									
P	216.0	-18.3	232.6	7.7	247.9	6.6	226.4	-8.7	250.1	10.5
share (%)	0.9		0.9		0.9		0.7		0.7	
FIN	N/A	N/A								
share (%)	N/A									
S	N/A	N/A								
share (%)	N/A									
UK	3777.9	7.5	4061.4	7.5	4254.0	4.7	4512.0	6.1	4064.5	-9.9
share (%)	15.1		15.6		15.2		14.7		12.2	

SOURCE:  eurostat

TABLE 3.1.6

Extra-EUR12 imports  
(million ECU)

	1990	t/ t-1 (%)	1991	t/ t-1 (%)	1992	t/ t-1 (%)	1993	t/ t-1 (%)	1994	t/ t-1 (%)
EUR12	19894.3	-1.1	20695.9	4.0	21307.6	3.0	21849.6	2.5	24418.3	11.8
B / L	941.7	-0.1	902.4	-4.2	881.0	-2.4	965.5	9.6	1186.8	22.9
share (%)	4.7		4.4		4.1		4.4		4.9	
DK	765.0	-8.7	773.0	1.0	882.9	14.2	910.9	3.2	1023.8	12.4
share (%)	3.8		3.7		4.1		4.2		4.2	
D	4355.0	2.7	4903.1	12.6	5075.8	3.5	5057.5	-0.4	5528.5	9.3
share (%)	21.9		23.7		23.8		23.1		22.6	
GR	240.5	-1.8	227.0	-5.6	233.9	3.0	200.0	-14.5	222.7	11.4
share (%)	1.2		1.1		1.1		0.9		0.9	
E	1376.7	2.9	1716.5	24.7	1810.4	5.5	2103.6	16.2	2125.2	1.0
share (%)	6.9		8.3		8.5		9.6		8.7	
F	3001.0	-3.7	3037.1	1.2	2948.6	-2.9	2910.8	-1.3	3027.0	4.0
share (%)	15.1		14.7		13.8		13.3		12.4	
IRL	175.2	-8.1	192.5	9.9	202.6	5.2	235.9	16.4	261.5	10.9
share (%)	0.9		0.9		1.0		1.1		1.1	
I	2435.5	-3.5	2420.4	-0.6	2291.2	-5.3	2346.4	2.4	2739.7	16.8
share (%)	12.2		11.7		10.8		10.7		11.2	
NL	2270.7	0.6	2116.4	-6.8	2511.2	18.7	2381.8	-5.2	3414.6	43.4
share (%)	11.4		10.2		11.8		10.9		14.0	
A	N/A	N/A								
share (%)	N/A									
P	344.7	-4.8	378.0	9.7	397.7	5.2	396.7	-0.3	396.4	-0.1
share (%)	1.7		1.8		1.9		1.8		1.6	
FIN	N/A	N/A								
share (%)	N/A									
S	N/A	N/A								
share (%)	N/A									
UK	3988.3	-1.7	4029.5	1.0	4072.4	1.1	4340.3	6.6	4492.0	3.5
share (%)	20.0		19.5		19.1		19.9		18.4	

SOURCE:  eurostat

FIGURE 3.2.1

EUR15 production and  
producer price indexes  
(1990 = 100)

— Index of production  
— Producer price index

SOURCE: 

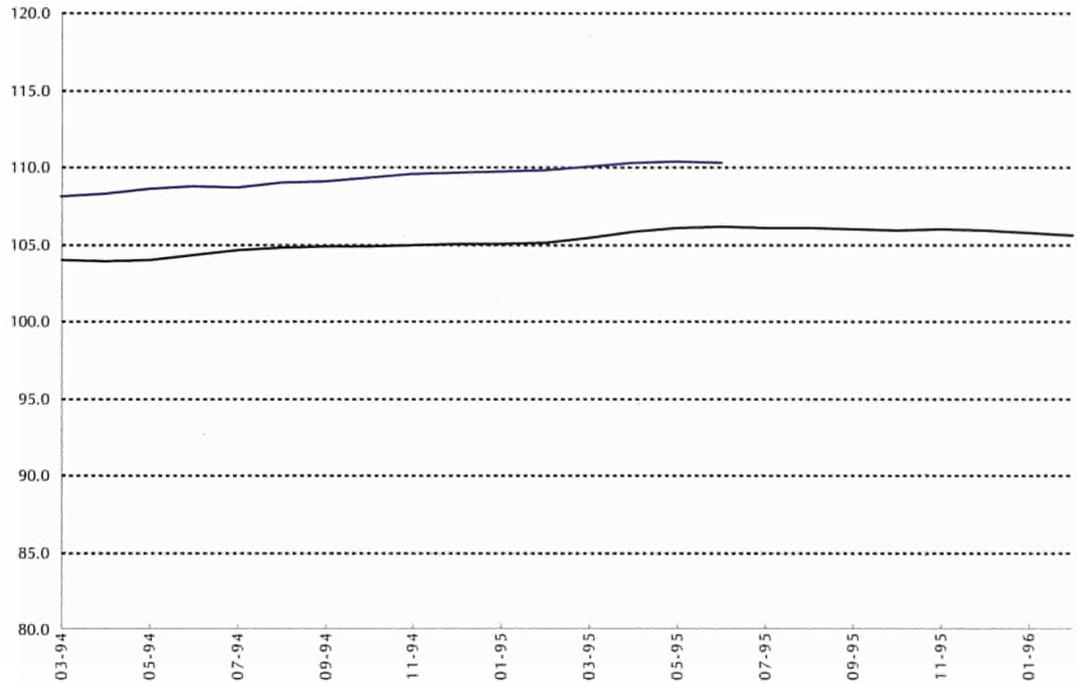


TABLE 3.2.1

Three month on three  
month and year on  
year growth rates for  
production and  
producer prices  
(%)

SOURCE: 

	Latest quarter available		Production index		Latest quarter available		Producer price index	
			t / t-1	t / t-4			t / t-1	t / t-4
EUR15	12-95	⇔ 02-96	-0.1	0.9	04-95	⇔ 06-95	0.4	1.6
B	08-95	⇔ 10-95	0.0	4.4	05-95	⇔ 07-95	-0.4	-0.2
DK	12-95	⇔ 02-96	-2.6	-6.1	12-95	⇔ 02-96	0.2	1.5
D	12-95	⇔ 02-96	3.1	6.8	01-96	⇔ 03-96	-0.2	0.2
GR	11-95	⇔ 01-96	0.7	-1.8	12-95	⇔ 02-96	4.1	9.5
E	12-95	⇔ 02-96	-6.0	-7.6	12-95	⇔ 02-96	2.3	6.7
F	12-95	⇔ 02-96	-0.9	0.2	04-95	⇔ 06-95	-0.4	-0.5
IRL	10-95	⇔ 12-95	0.8	2.0	12-95	⇔ 02-96	0.3	3.2
I	12-95	⇔ 02-96	0.7	3.0	12-95	⇔ 02-96	0.7	5.8
L	11-95	⇔ 01-96	1.1	2.6	10-94	⇔ 12-94	0.1	0.3
NL	08-95	⇔ 10-95	-1.2	1.8	10-95	⇔ 12-95	0.6	0.6
A			N/A	N/A			N/A	N/A
P	09-95	⇔ 11-95	-1.0	0.0	11-95	⇔ 01-96	0.7	4.8
FIN	12-95	⇔ 02-96	0.0	-0.4	01-96	⇔ 03-96	-0.4	-4.2
S	12-95	⇔ 02-96	1.4	3.8	01-96	⇔ 03-96	-1.3	0.7
UK	12-95	⇔ 02-96	0.3	-1.3	01-96	⇔ 03-96	1.1	2.9

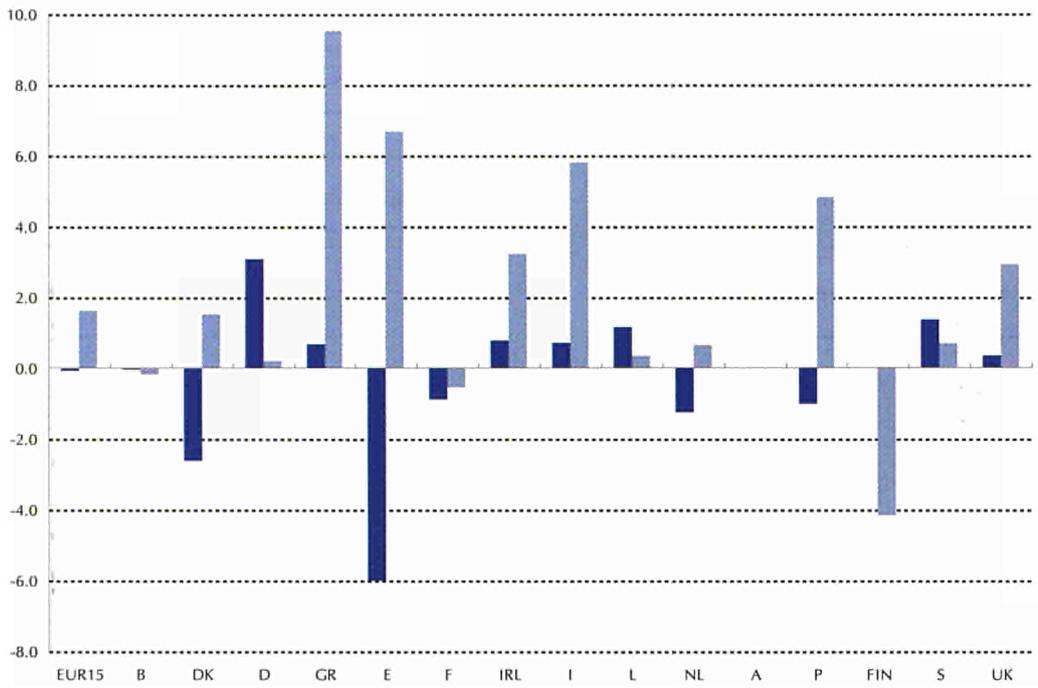


FIGURE 3.2.2

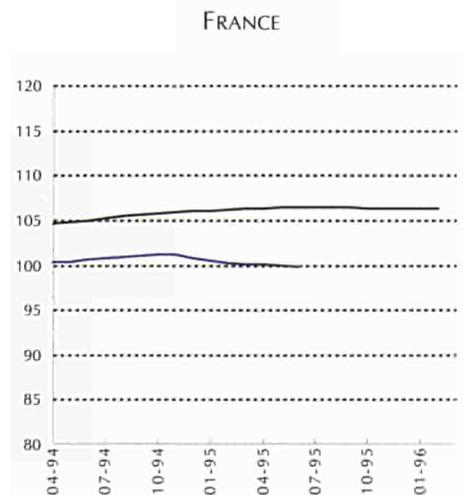
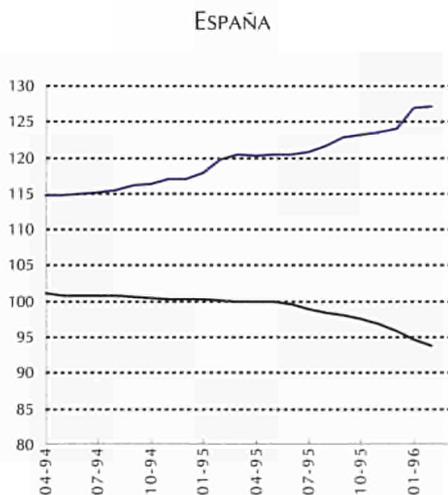
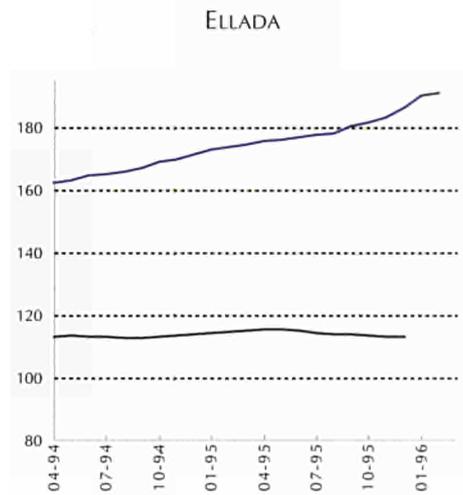
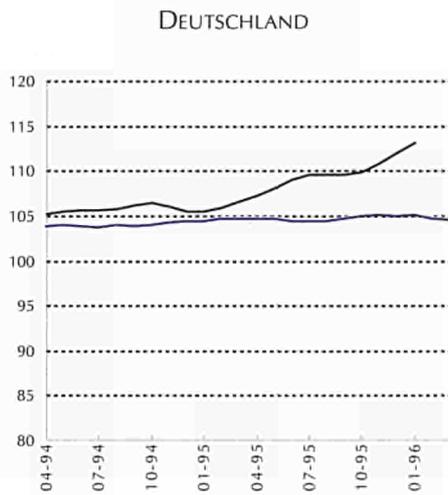
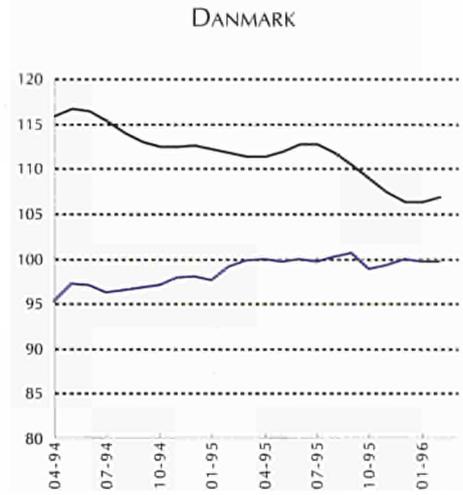
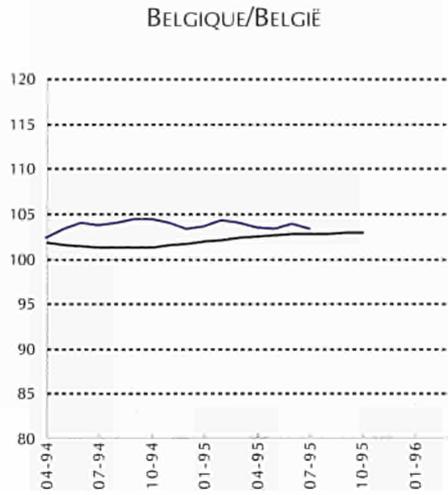
Year on year growth rates for production and producer price indexes, based on changes from the corresponding quarter of the previous year (%)

■ Production  
 ■ Producer prices

SOURCE: eurostat

FIGURE 3.2.3

Production and  
producer price indexes  
(1990 = 100)



— Index of production  
— Producer price index

SOURCE: eurostat

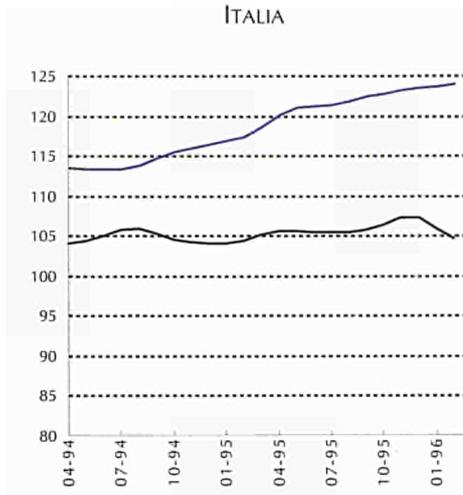
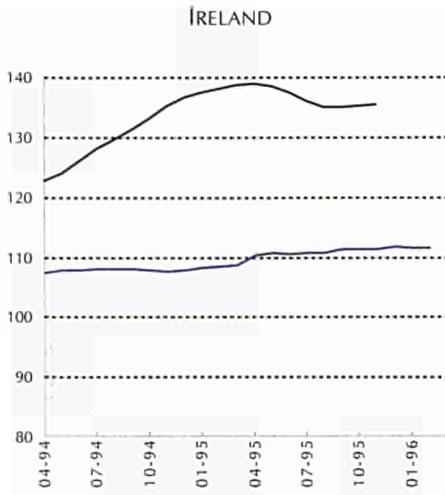
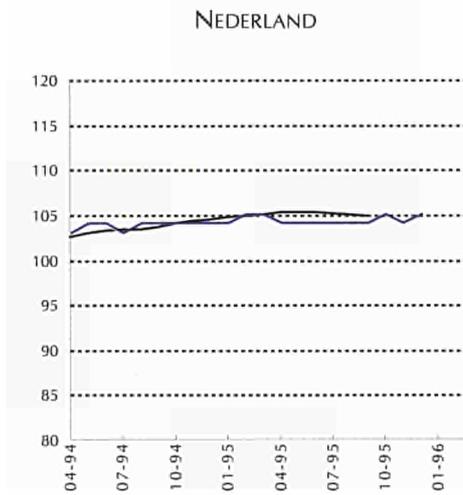
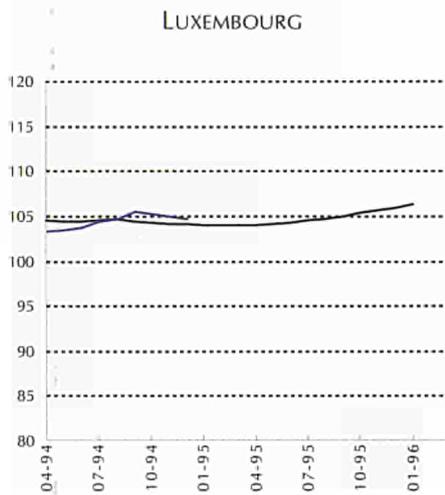
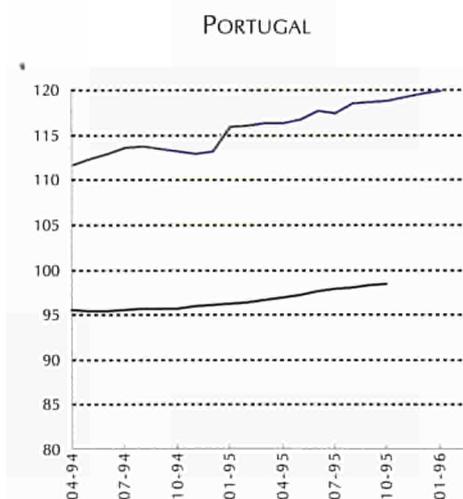
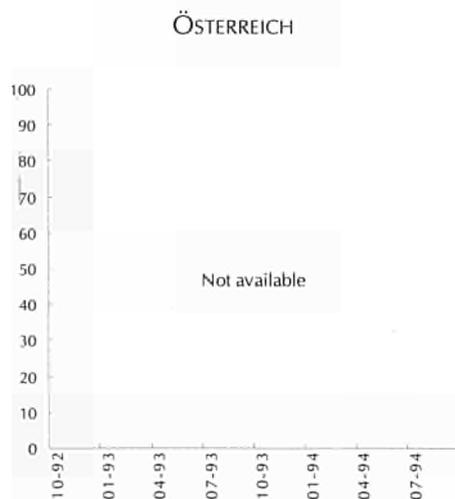


FIGURE 3.2.3

Production and  
 producer price indexes  
 (1990 = 100)



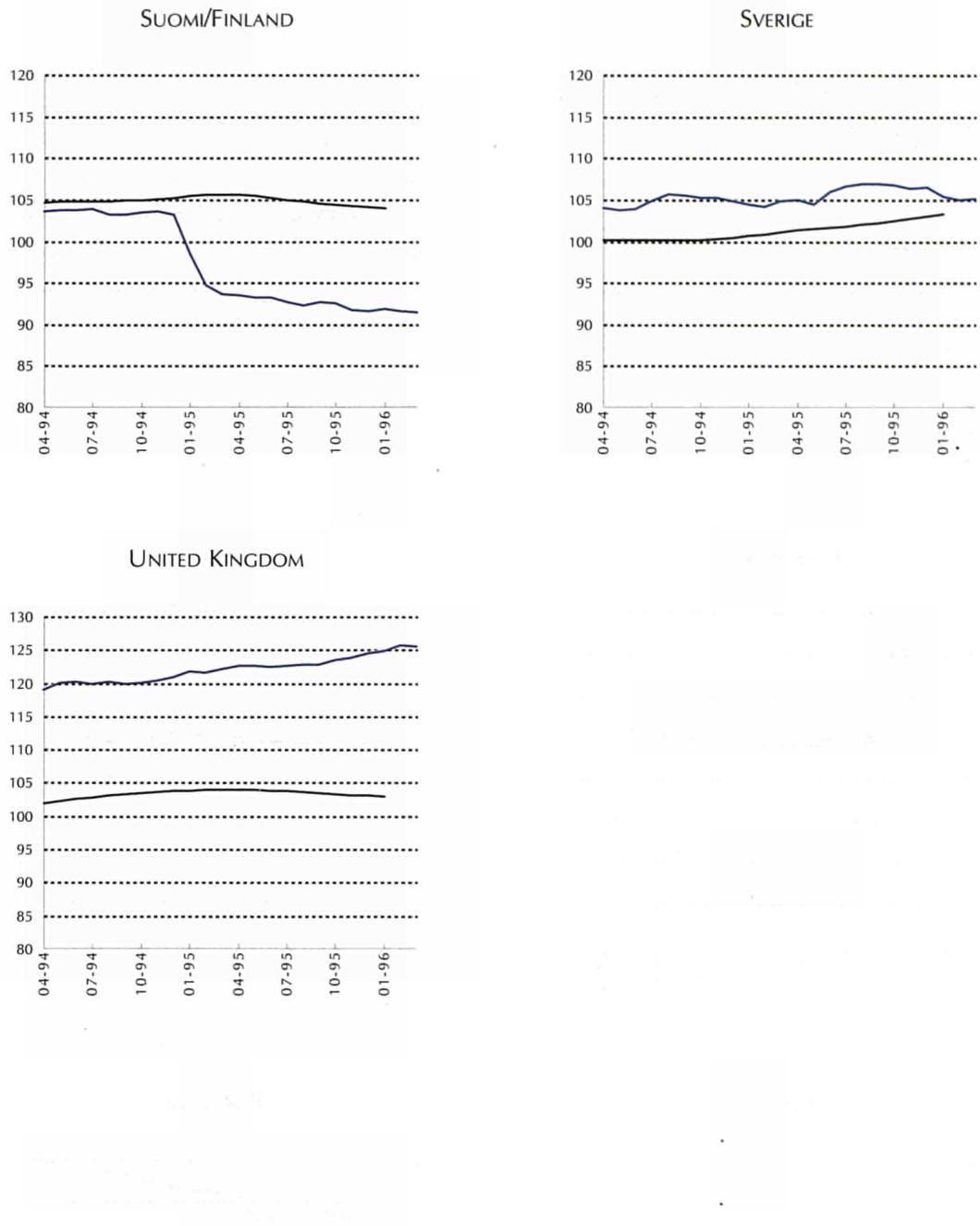
— Index of production  
 — Producer price index



SOURCE: eurostat

FIGURE 3.2.3

Production and  
producer price indexes  
(1990 = 100)



SOURCE:  eurostat

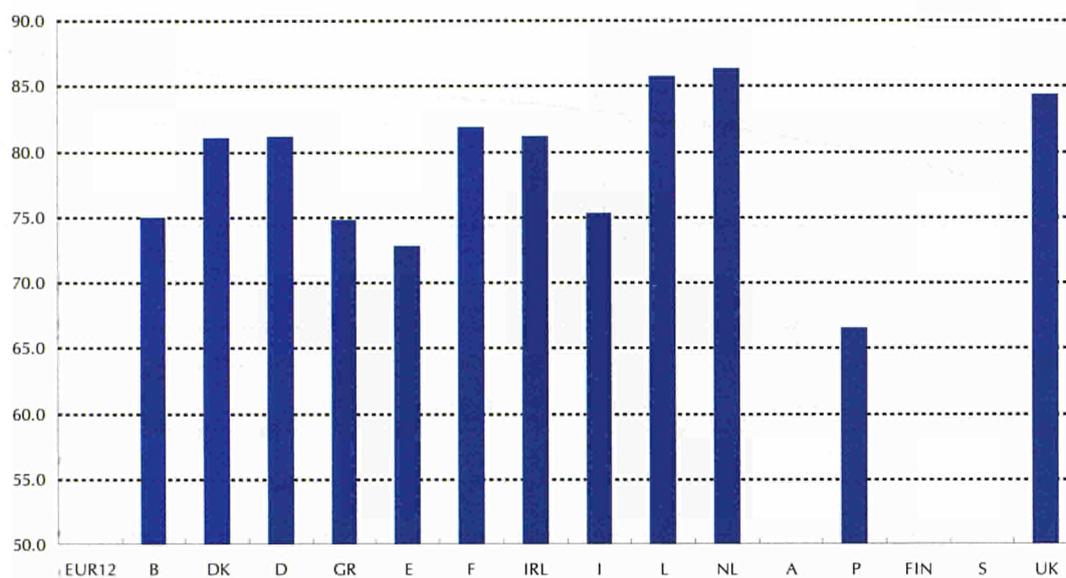


FIGURE 3.2.4

Capacity utilisation  
rates, first quarter  
1996  
(%)

SOURCE: DGII,  
BUSINESS SURVEY

	Annual growth rate: latest quarter, t / t-4	Second quarter 1995	Third quarter 1995	Fourth quarter 1995	First quarter 1996
EUR12	1.3	79.0	79.9	80.5	N/A
B	-2.1	75.0	75.1	75.6	75.0
DK	1.3	79.0	82.0	80.0	81.0
D	-1.1	81.0	83.7	83.7	81.1
GR	3.0	69.5	72.7	79.2	74.8
E	1.3	67.1	71.3	69.6	72.8
F	0.5	81.5	81.8	83.1	81.8
IRL	11.6	73.8	86.9	81.9	81.1
I	1.9	74.2	72.5	74.9	75.3
L	-0.7	85.6	85.2	85.7	85.7
NL	1.5	85.4	87.0	86.0	86.3
A	N/A	N/A	N/A	N/A	N/A
P	1.2	68.6	69.3	74.9	66.5
FIN	N/A	N/A	N/A	N/A	N/A
S	N/A	N/A	N/A	N/A	N/A
UK	0.6	85.8	83.9	85.0	84.3

TABLE 3.2.2

Capacity utilisation  
rates  
(%)

SOURCE: DGII,  
BUSINESS SURVEY

FIGURE 3.2.5

Trade indicators,  
trend cycle  
(1990 = 100)

— Export value  
— Import value  
- - - Terms of trade

SOURCE: 

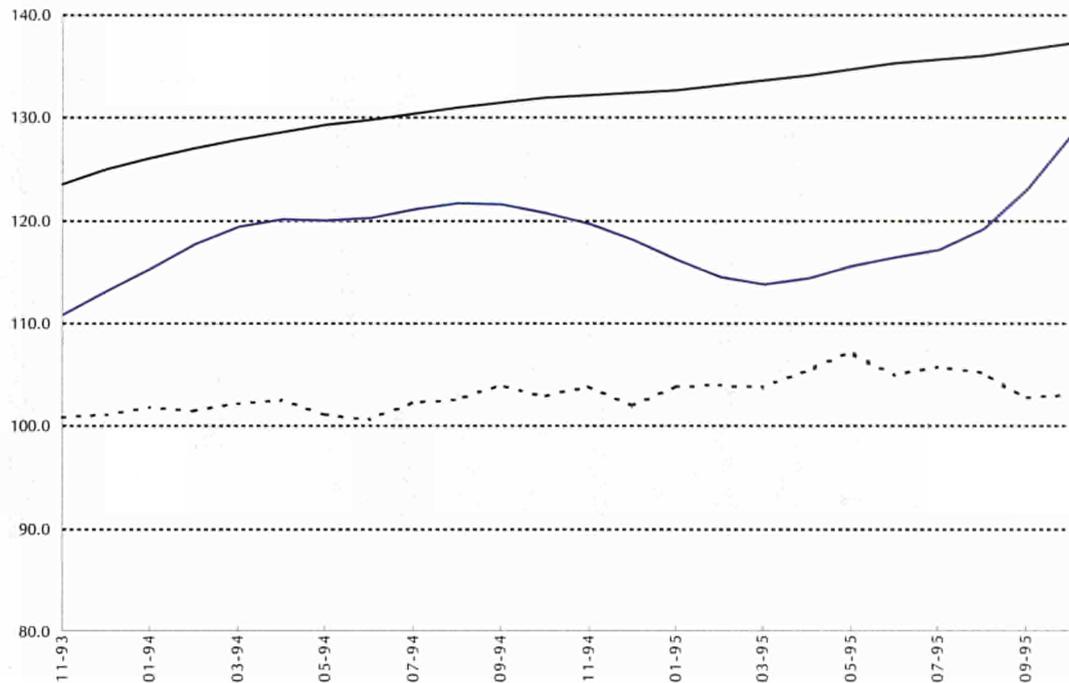


TABLE 3.2.3

Three month on three  
month growth rates  
for trade indicators,  
in ECU terms  
(%)

SOURCE: 

	Latest quarter available		Exports		Imports		Terms of trade
	Value	Volume	Value	Volume			
EUR12	08-95	10-95	0.3	-2.5	5.0	-0.6	-2.2
B / L	06-95	08-95	-0.7	-5.4	-2.0	-2.1	1.8
DK	06-95	08-95	0.9	1.1	2.8	2.5	-0.2
D	06-95	08-95	4.0	5.8	1.0	2.0	0.8
GR	06-95	08-95	2.3	0.0	4.5	8.5	4.5
E	06-95	08-95	3.0	2.7	1.5	5.4	4.2
F	06-95	08-95	1.0	0.2	0.2	2.0	0.9
IRL	05-95	07-95	-0.7	-4.9	6.0	3.0	7.8
I	06-95	08-95	7.0	2.6	5.3	2.7	3.5
NL	06-95	08-95	-9.9	-2.4	-10.2	-8.7	0.9
A			N/A	N/A	N/A	N/A	N/A
P	06-95	08-95	2.7	1.7	-2.4	-3.4	-1.5
FIN			N/A	N/A	N/A	N/A	N/A
S			N/A	N/A	N/A	N/A	N/A
UK	06-95	08-95	5.5	4.9	3.4	-0.8	-4.5

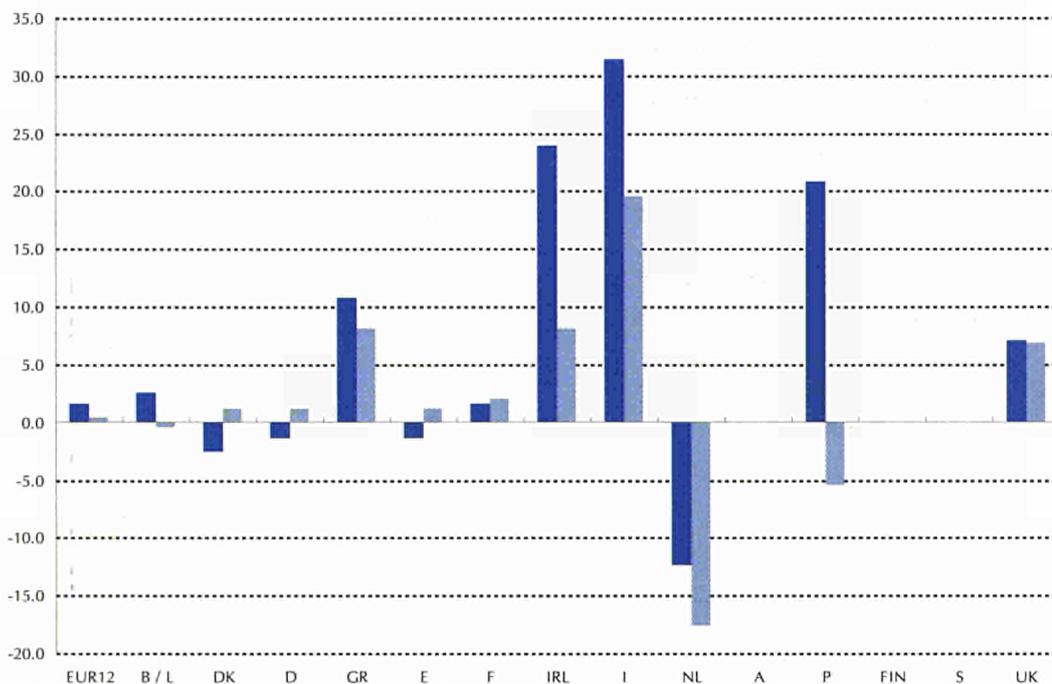


FIGURE 3.2.6

Year on year growth rates for trade indicators, based on changes from the corresponding quarter of the previous year, in ECU terms (%)

■ Export value  
■ Import value

SOURCE: eurostat

	Latest quarter available		Exports		Imports		Terms of trade
	Value	Volume	Value	Volume			
EUR12	08-95	⇒ 10-95	1.5	-2.4	0.4	-3.1	0.5
B / L	06-95	⇒ 08-95	2.5	0.1	-0.5	-1.1	1.7
DK	06-95	⇒ 08-95	-2.6	-1.8	1.1	1.6	-0.2
D	06-95	⇒ 08-95	-1.4	-3.1	1.1	1.7	2.2
GR	06-95	⇒ 08-95	10.7	-1.4	8.1	0.6	4.6
E	06-95	⇒ 08-95	-1.5	-11.3	1.1	1.9	12.0
F	06-95	⇒ 08-95	1.6	-0.6	2.0	1.2	1.4
IRL	05-95	⇒ 07-95	23.9	12.4	8.1	9.5	11.6
I	06-95	⇒ 08-95	31.4	14.2	19.5	5.9	2.1
NL	06-95	⇒ 08-95	-12.5	-12.7	-17.7	-16.5	1.7
A			N/A	N/A	N/A	N/A	N/A
P	06-95	⇒ 08-95	20.8	17.8	-5.4	-9.2	-1.5
FIN			N/A	N/A	N/A	N/A	N/A
S			N/A	N/A	N/A	N/A	N/A
UK	06-95	⇒ 08-95	7.0	5.0	6.8	-3.9	-8.2

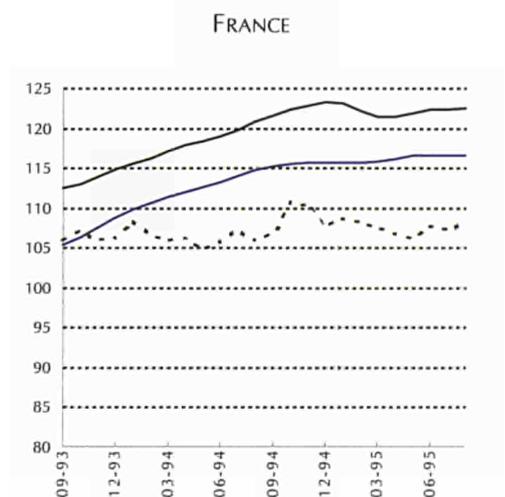
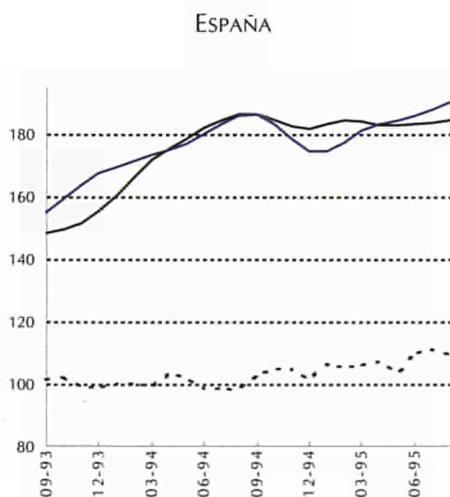
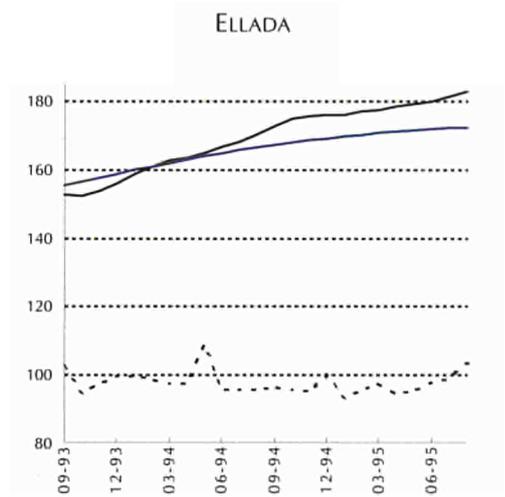
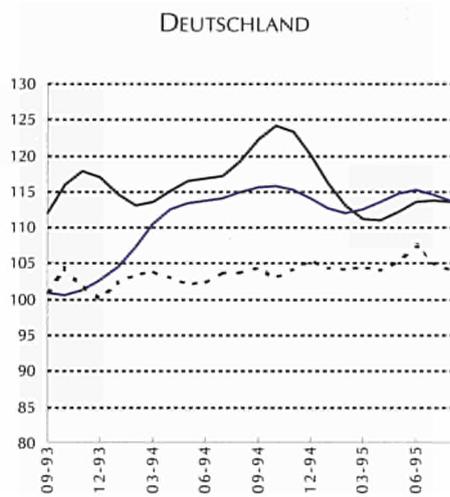
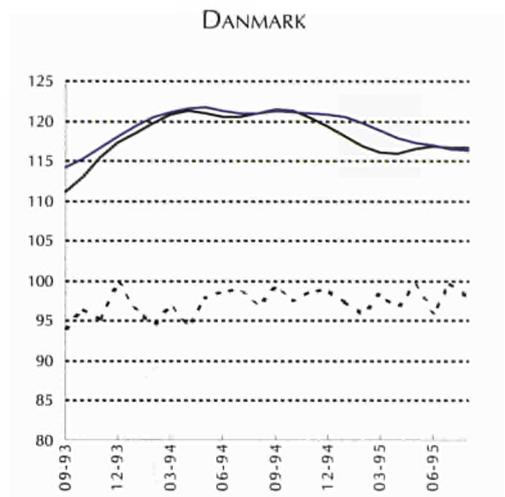
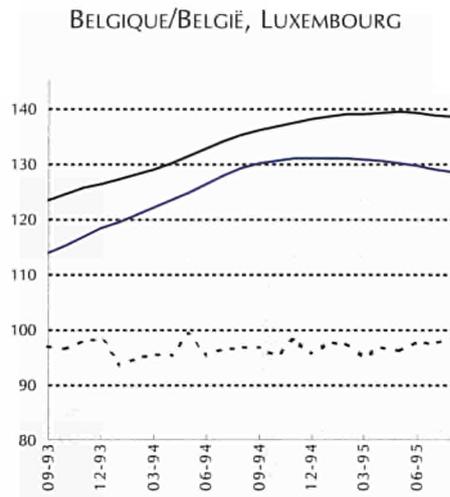
TABLE 3.2.4

Year on year growth rates for trade indicators, based on changes from the corresponding quarter of the previous year, in ECU terms (%)

SOURCE: eurostat

FIGURE 3.2.7

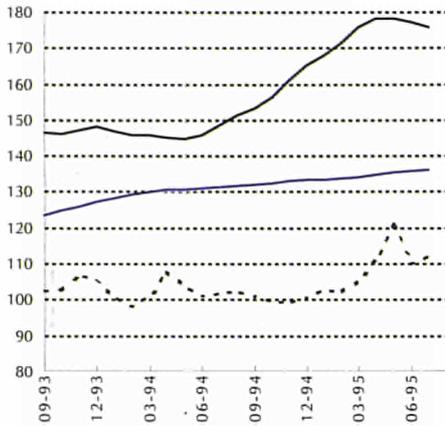
Trade indicators,  
trend cycle  
(1990 = 100)



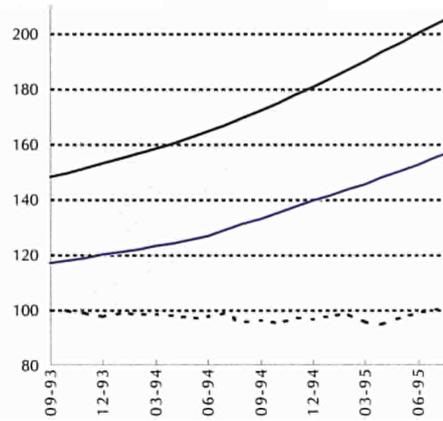
— Export value  
— Import value  
- - - Terms of trade

SOURCE: eurostat

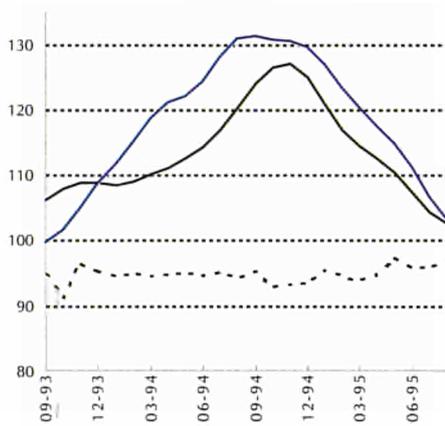
IRELAND



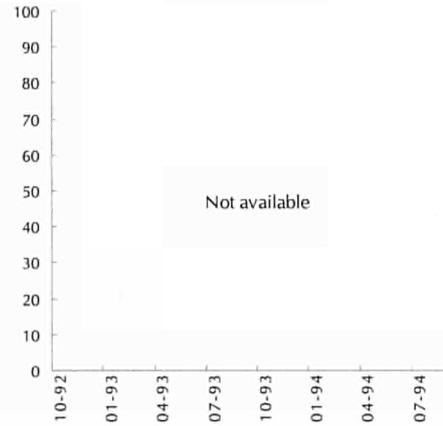
ITALIA



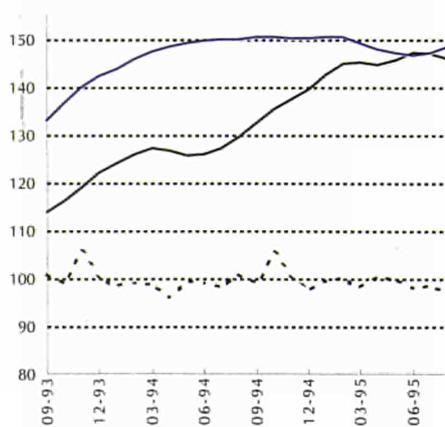
NEDERLAND



ÖSTERREICH



PORTUGAL



SUOMI/FINLAND

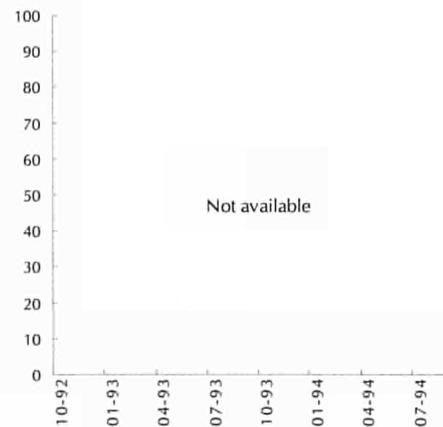


FIGURE 3.2.7

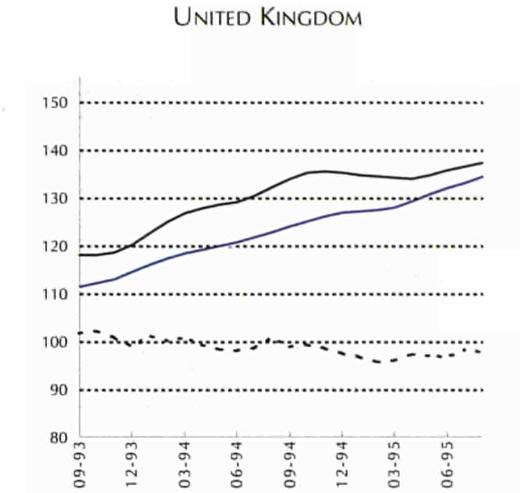
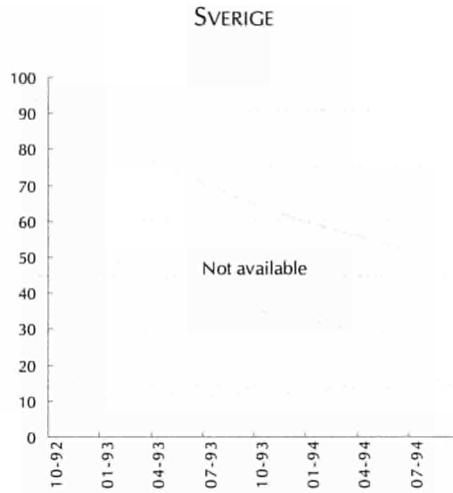
Trade indicators,  
trend cycle  
(1990 = 100)

- Export value
- Import value
- - - Terms of trade

SOURCE:  eurostat

FIGURE 3.2.7

Trade indicators,  
trend cycle  
(1990 = 100)



- Export value
- - - Import value
- - - Terms of trade

SOURCE: eurostat

The European clothing industry remains depressed. Following an increase in the volume of production of 1.5 % in the EUR15 in 1994, there was no change in production in 1995. Increases in production in the first two quarters were offset by decreases in the last two quarters. Experience among Member States varied considerably in 1995. There was a large increase in production of 27.5% in Sweden, followed by increases in Portugal and Italy (the largest producer), but in all three states the increases in production were lower in the last two quarters of 1995 than in the first two quarters. Decreases in production took place in a substantial number of Member States. The largest decrease was in Austria, of 21.2%, with substantial decreases also in Finland, France, Germany, Greece and Ireland. In Austria the situation got worse as the year progressed, as it did in France also, but in Germany the decreases became smaller during the year. There was a decrease of 8.3% in the year as a whole for Germany, but in the fourth quarter of the year there was a decrease of 3.4% only, compared to the corresponding quarter a year earlier. The large changes in production in 1995 in Austria and Sweden - and also in Finland - may be connected with the accession of these countries to the EU in 1995.



Capacity utilisation increased during 1995 for the EU as a whole, comparing the last quarter of the year with the last quarter of 1994. This was true for all Member States, except for Belgium and Denmark. In the EU as a whole there was a dip in the third quarter and a rise in the last quarter of the year. This pattern was common to several Member States, for example Belgium, Germany, Greece, Spain, Ireland and the Netherlands, although in several cases the increase in capacity utilisation in the last quarter was not connected with any rise in production at that time. Capacity utilisation fell during 1995 in Denmark, which started the year with the highest rate of capacity utilisation in the EU. By the last quarter, the highest rates of capacity utilisation were in the UK, the Netherlands, Spain and France, with rates between 85% and 90%. The lowest rates of capacity utilisation in the last quarter of the year were in Belgium (73.4%) and Greece (68.6%).

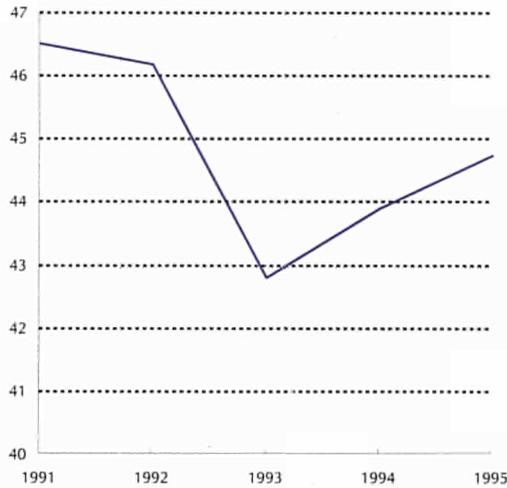
Producer prices for clothing in the EUR15 as a whole have risen in every quarter from the beginning of 1992 until the end of 1995. The rate of increase tended to fall until early in 1994 and then to rise. An increase of 1.3% in 1994 was followed by an increase of 1.6% in 1995. The rate of increase levelled off at 1.5% in the last quarter of the year. Among Member States there were variations in the rates of increase - none saw a decrease. Producer prices rose most in Greece in 1995 (9.8%). Increases of 2-3% took place in Portugal, Finland, Sweden and the UK, with smaller increases in other states. Prices changed very little in Belgium and the Netherlands. In Germany there was no change in prices at all - indeed, there was a

OPT (Outward Processing Trade) imports have been growing in importance

IN THIS SECTION:	
COMMENTARY	53
STRUCTURAL INDICATORS	57
SHORT-TERM INDICATORS	60

FIGURE 4.1.1

EUR12 production in constant prices (billion ECU)



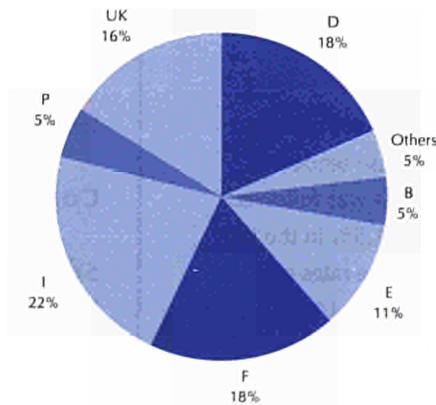
SOURCE: DEBA GEIE

very slight fall in the last quarter, compared with a year earlier. It is interesting that in 1995 producer prices for clothing rose less than producer prices for textiles, suggesting continued keen competition in the clothing market.

Consumer prices for clothing have reflected the movement in producer prices since 1992, although the increases have been slightly higher. In 1995 consumer prices rose by 2.1%, with the rate of increase rising during the year, to reach 2.4% in the last quarter. There were some price falls among Member States, with Austria experiencing a fall of 2.4%.

FIGURE 4.1.2

Share of value-added at factor cost, 1995 (%)



SOURCE: DEBA GEIE

Member States (EUR12) imported just about 30% of their apparent consumption of clothing in 1994, and exported 15.4% of their production. In the period January to August 1995 imports as a percentage of apparent consumption, and exports as a percentage of production, were little changed. During January to August 1995 EU imports fell by 2% in volume terms, compared with the same period a year earlier, while exports rose by 4%, but in value both are estimated to have fallen slightly in the year as a whole. As a consequence, the trade balance improved slightly from the EU point of view. The trade deficit in current prices fell from 11.05 billion ECU in 1994 to an estimated 10.95 billion ECU in 1995.

The principal third country export markets for EUR12 clothing in 1994 were Switzerland, with 14.4% by value of the total, followed by the USA and Japan. The same three countries had been the largest export markets in 1989, but their importance had been reduced by 1994, at the expense of increased exports to the countries of Central and Eastern Europe. These changes in the destination of exports were overshadowed by the extent of changes in the countries of origin of imports into the EUR12. In 1989 Hong Kong had been the largest source of imports, with 13.9% of the total, followed by Turkey and then China (with 8.6%). By 1994 China had become much the largest source of imports, with 15.8% of the total, followed at some distance by Hong Kong (8.8%) and Turkey (6.9%). Another large supplier throughout the period was India.

A noteworthy development has been the increased importance as suppliers of Tunisia, Poland, Morocco and Romania. The exports of these countries have benefited from the growth of OPT (Outward Processing Trade), under which EU fabrics are exported for making up in the countries of Central and Eastern Europe and of the Mediterranean, and subsequent re-importation as clothing into the EU. Recorded OPT imports of clothing into the EU rose from 9% of total EU clothing imports in 1990 to nearly 12% in 1994. There is however considerable under-reporting of OPT imports from Mediterranean countries, which are particularly linked with France in OPT trade. Germany is the most important OPT importer of clothing, accounting for nearly two-thirds of all EU OPT imports in 1994. OPT imports into Italy have increased rapidly, and Italy has now overtaken France in the reported volume of its OPT clothing imports. Even in the UK, which has traditionally not relied greatly on OPT, these imports have increased rapidly in recent years. A significant difference exists between the average EU import price and export price for clothing. The average price of EU clothing exports in 1994 was around 38 ECU per kilogram, compared to an average import price of 17 ECU. This reflects the fact that the EU tends to export higher quality garments to other developed countries, while it imports cheaper, lower quality garments from regions with mostly significantly lower costs of production.

Productivity has been rising strongly in the EU clothing industry. Between 1988 and 1994 it rose at an annual average rate of 4.5%. This compares with annual average rates of increase of 3.3% in the textile industry and 2.5% in manufacturing industry generally. Even so, productivity in clothing remains below that in textiles, and well below that in manufacturing industry generally. In 1994, EU the value of production per employee was 21,300 ECU in clothing, in constant 1990 prices, as compared with 27,100 ECU in textiles, and 42,900 ECU in manufacturing generally.

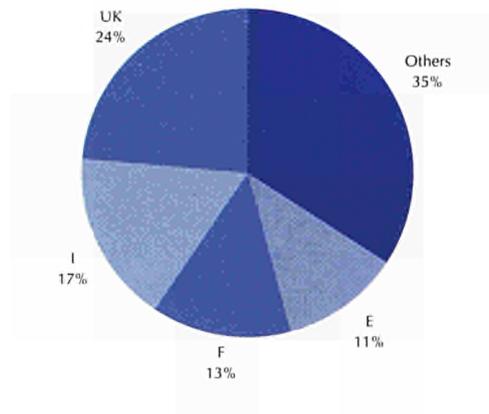


FIGURE 4.1.3

Share of number of employees, 1995 (%)

SOURCE: DEBA GEIE

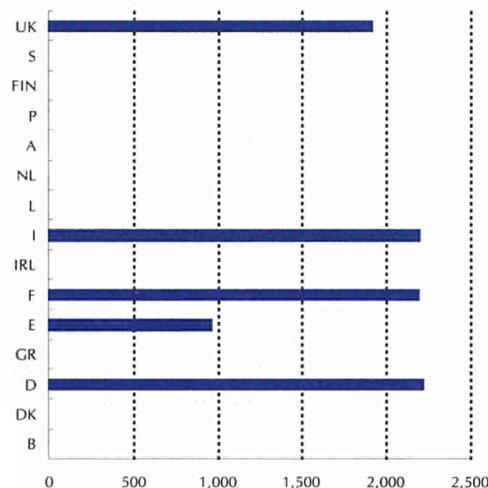


FIGURE 4.1.4

Labour costs, 1994 (million ECU)

SOURCE: DEBA GEIE

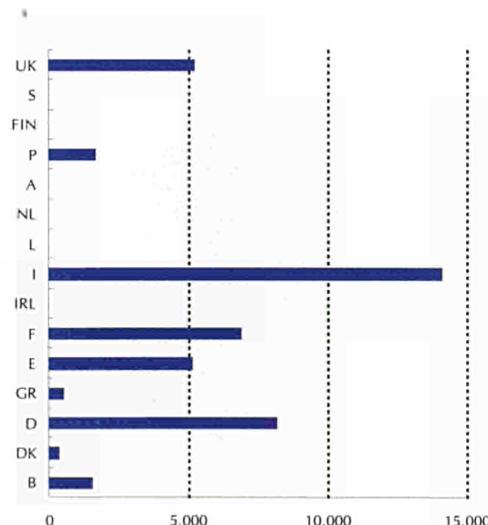


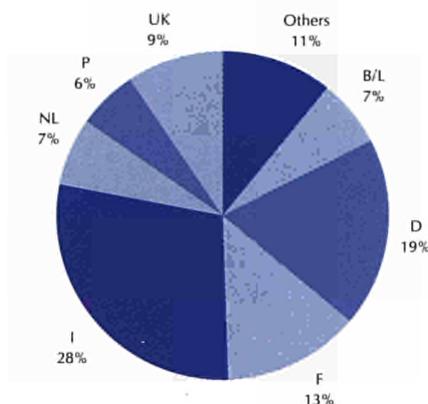
FIGURE 4.1.5

Production in constant prices, 1995 (million ECU)

SOURCE: DEBA GEIE

FIGURE 4.1.6

Share of world exports, 1994 (%)



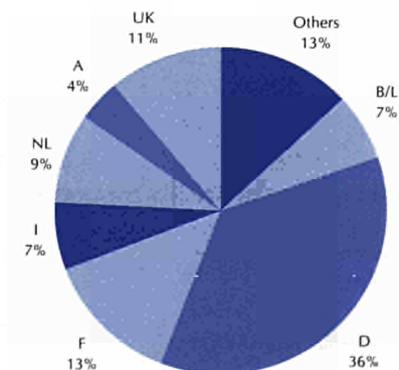
SOURCE: eurostat

Despite the large changes that have taken place in the EU clothing industry generally, and also in every Member State, further changes are in prospect as a result of the conclusion of the Uruguay Round of trade negotiations. The MFA (Multi-Fibre Arrangement), which has served to limit imports of textiles and clothing into the EU, especially from the countries of Asia and the Indian sub-continent, is being phased out over a ten year period from 1 January 1995. Textile and clothing products are therefore being integrated into the GATT (now WTO) framework. This is bound to result in further import competition in the EU clothing market, although improved opportunities should also occur for EU exports to countries hitherto effectively closed to them.

The rise in clothing productivity, together with that in import penetration, has led to a steep fall in the numbers employed. Total EUR12 employment, in firms of all sizes in clothing, fell from 1,235,000 in 1990 to 971,000 in 1994. There was a fall of 4.8% between 1993 and 1994. Because of the increase in productivity, Italy, the largest clothing producer in the EU, was able to increase its clothing production by volume by almost 6% in 1994, while the industry reduced its workforce by almost 13% in the course of that year. In Spain, clothing production in 1994 increased by 13.3%, and this was accompanied by a fall in employment of 9.4%.

FIGURE 4.1.7

Share of world imports, 1994 (%)



SOURCE: eurostat

TABLE 4.1.1

Value-added at  
factor cost  
(million ECU)

	1991	t / t-1 (%)	1992	t / t-1 (%)	1993	t / t-1 (%)	1994	t / t-1 (%)	1995	t / t-1 (%)
EUR12	16967.9	3.5	17134.3	1.0	15354.6	-10.4	15495.9	0.9	15471.7	-0.2
B	610.6	1.2	638.4	4.6	725.2	13.6	761.0	4.9	767.7	0.9
share (%)	3.6		3.7		4.7		4.9		5.0	
DK	172.8	5.1	201.0	16.3	170.0	-15.4	176.8	4.0	194.9	10.2
share (%)	1.0		1.2		1.1		1.1		1.3	
D	3468.6	1.9	3336.0	-3.8	3222.8	-3.4	2992.2	-7.2	2852.9	-4.7
share (%)	20.4		19.5		21.0		19.3		18.4	
GR	242.1	-1.0	232.3	-4.0	217.5	-6.4	198.8	-8.6	187.2	-5.8
share (%)	1.4		1.4		1.4		1.3		1.2	
E	1975.8	13.4	1928.2	-2.4	1520.1	-21.2	1665.6	9.6	1673.8	0.5
share (%)	11.6		11.3		9.9		10.7		10.8	
F	2686.7	-1.7	2679.7	-0.3	2564.6	-4.3	2564.7	0.0	2779.3	8.4
share (%)	15.8		15.6		16.7		16.6		18.0	
IRL	N/A	N/A								
share (%)	N/A									
I	4167.7	8.5	4472.4	7.3	3401.7	-23.9	3527.6	3.7	3432.2	-2.7
share (%)	24.6		26.1		22.2		22.8		22.2	
L	N/A	N/A								
share (%)	N/A									
NL	N/A	N/A								
share (%)	N/A									
A	N/A	N/A								
share (%)	N/A									
P	814.9	25.7	864.3	6.1	778.4	-9.9	685.6	-11.9	768.6	12.1
share (%)	4.8		5.0		5.1		4.4		5.0	
FIN	N/A	N/A								
share (%)	N/A									
S	N/A	N/A								
share (%)	N/A									
UK	2501.1	-6.6	2453.6	-1.9	2435.0	-0.8	2600.6	6.8	2498.4	-3.9
share (%)	14.7		14.3		15.9		16.8		16.1	

SOURCE: DEBA GEIE

TABLE 4.1.2

Production in  
current prices  
(million ECU)

	1991	t / t-1 (%)	1992	t / t-1 (%)	1993	t / t-1 (%)	1994	t / t-1 (%)	1995	t / t-1 (%)
EUR12	48293.5	4.0	48985.8	1.4	44090.9	-10.0	44808.2	1.6	44785.0	-0.1
B	1493.1	7.7	1564.6	4.8	1780.9	13.8	1868.8	4.9	1885.4	0.9
share (%)	3.1		3.2		4.0		4.2		4.2	
DK	395.7	3.1	469.7	18.7	397.4	-15.4	413.3	4.0	455.4	10.2
share (%)	0.8		1.0		0.9		0.9		1.0	
D	11211.6	4.3	10774.6	-3.9	10599.5	-1.6	10051.9	-5.2	9682.5	-3.7
share (%)	23.2		22.0		24.0		22.4		21.6	
GR	673.4	-2.3	677.4	0.6	728.8	7.6	690.9	-5.2	662.5	-4.1
share (%)	1.4		1.4		1.7		1.5		1.5	
E	4807.7	13.7	4692.1	-2.4	3993.8	-14.9	4691.8	17.5	4656.1	-0.8
share (%)	10.0		9.6		9.1		10.5		10.4	
F	7117.5	-2.2	7317.0	2.8	7015.0	-4.1	7015.4	0.0	7677.7	9.4
share (%)	14.7		14.9		15.9		15.7		17.1	
IRL	N/A	N/A								
share (%)	N/A									
I	13842.8	4.7	14761.6	6.6	11141.6	-24.5	11554.0	3.7	11241.3	-2.7
share (%)	28.7		30.1		25.3		25.8		25.1	
L	N/A	N/A								
share (%)	N/A									
NL	N/A	N/A								
share (%)	N/A									
A	N/A	N/A								
share (%)	N/A									
P	2390.4	20.2	2521.3	5.5	2270.7	-9.9	1997.6	-12.0	2238.4	12.1
share (%)	4.9		5.1		5.2		4.5		5.0	
FIN	N/A	N/A								
share (%)	N/A									
S	N/A	N/A								
share (%)	N/A									
UK	5491.7	-2.7	5336.4	-2.8	5311.9	-0.5	5672.8	6.8	5449.8	-3.9
share (%)	11.4		10.9		12.0		12.7		12.2	

SOURCE: DEBA GEIE

TABLE 4.1.3

Number of employees  
(thousands)

	1991	t / t-1 (%)	1992	t / t-1 (%)	1993	t / t-1 (%)	1994	t / t-1 (%)	1995	t / t-1 (%)
EUR12	859972.0	-2.3	812722.0	-5.5	777808.0	-4.3	740668.0	-4.8	714125.0	-3.6
B	22208.0	-6.4	20215.0	-9.0	18483.0	-8.6	18554.0	0.4	16959.0	-8.6
share (%)	2.6		2.5		2.4		2.5		2.4	
DK	6119.0	-3.1	6512.0	6.4	6012.0	-7.7	N/A	N/A	N/A	N/A
share (%)	0.7		0.8		0.8		N/A		N/A	
D	139185.0	-5.5	122442.0	-12.0	103450.0	-15.5	90304.0	-12.7	N/A	N/A
share (%)	16.2		15.1		13.3		12.2		N/A	
GR	28953.0	-5.4	27069.0	-6.5	24519.0	-9.4	22309.0	-9.0	18084.0	-18.9
share (%)	3.4		3.3		3.2		3.0		2.5	
E	97812.0	1.1	89677.0	-8.3	85628.0	-4.5	79998.0	-6.6	81277.0	1.6
share (%)	11.4		11.0		11.0		10.8		11.4	
F	115818.0	-2.4	111071.0	-4.1	101142.0	-8.9	96240.0	-4.8	95480.0	-0.8
share (%)	13.5		13.7		13.0		13.0		13.4	
IRL	N/A	N/A								
share (%)	N/A									
I	156750.0	1.4	155183.0	-1.0	152079.0	-2.0	134156.0	-11.8	123288.0	-8.1
share (%)	18.2		19.1		19.6		18.1		17.3	
L	N/A	N/A								
share (%)	N/A									
NL	N/A	N/A								
share (%)	N/A									
A	N/A	N/A								
share (%)	N/A									
P	123220.0	9.3	122830.0	-0.3	117330.0	-4.5	113925.0	-2.9	N/A	N/A
share (%)	14.3		15.1		15.1		15.4		N/A	
FIN	N/A	N/A								
share (%)	N/A									
S	N/A	N/A								
share (%)	N/A									
UK	153540.0	-10.9	142308.0	-7.3	154977.0	8.9	166084.0	7.2	160368.0	1.4
share (%)	17.9		17.5		19.9		22.4		23.6	

SOURCE: DEBA GEIE

TABLE 4.1.4

Labour costs  
(million ECU)

	1991	t / t-1 (%)	1992	t / t-1 (%)	1993	t / t-1 (%)	1994	t / t-1 (%)	1995	t / t-1 (%)
EUR12	12498.9	4.6	12442.9	-0.4	11544.2	-7.2	11075.8	-4.1	N/A	N/A
B	343.6	-1.7	322.1	-6.3	316.9	-1.6	N/A	N/A	N/A	N/A
share (%)	2.7		2.6		2.7		N/A		N/A	
DK	110.3	-4.0	127.3	15.4	121.6	-4.5	N/A	N/A	N/A	N/A
share (%)	0.9		1.0		1.1		N/A		N/A	
D	2690.5	2.0	2608.8	-3.0	2471.1	-5.3	2230.1	-9.8	N/A	N/A
share (%)	21.5		21.0		21.4		20.1		N/A	
GR	222.9	-1.1	216.7	-2.8	208.4	-3.8	N/A	N/A	N/A	N/A
share (%)	1.8		1.7		1.8		N/A		N/A	
E	1193.2	12.2	1187.8	-0.5	1069.4	-10.0	973.6	-9.0	N/A	N/A
share (%)	9.5		9.5		9.3		8.8		N/A	
F	2267.0	0.4	2305.5	1.7	2258.1	-2.1	2206.8	-2.3	N/A	N/A
share (%)	18.1		18.5		19.6		19.9		N/A	
IRL	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
share (%)	N/A		N/A		N/A		N/A		N/A	
I	2984.5	9.4	3019.2	1.2	2504.3	-17.1	2209.2	-11.8	N/A	N/A
share (%)	23.9		24.3		21.7		19.9		N/A	
L	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
share (%)	N/A		N/A		N/A		N/A		N/A	
NL	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
share (%)	N/A		N/A		N/A		N/A		N/A	
A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
share (%)	N/A		N/A		N/A		N/A		N/A	
P	632.4	27.6	688.1	8.8	648.7	-5.7	N/A	N/A	N/A	N/A
share (%)	5.1		5.5		5.6		N/A		N/A	
FIN	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
share (%)	N/A		N/A		N/A		N/A		N/A	
S	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A	N/A
share (%)	N/A		N/A		N/A		N/A		N/A	
UK	1822.4	-1.0	1736.2	-4.7	1715.7	-1.2	1925.5	12.2	1915.8	-0.5
share (%)	14.6		14.0		14.9		17.4		N/A	

SOURCE: DEBA GEIE

TABLE 4.1.5

Extra-EUR12 exports  
(million ECU)

	1990	t / t-1 (%)	1991	t / t-1 (%)	1992	t / t-1 (%)	1993	t / t-1 (%)	1994	t / t-1 (%)
EUR12	6731.2	8.3	6684.7	-0.7	6853.2	2.5	7108.5	3.7	8135.0	14.4
B / L	121.9	29.5	125.6	3.0	133.1	6.0	117.3	-11.9	120.2	2.5
share (%)	1.8		1.9		1.9		1.7		1.5	
DK	205.4	18.2	231.5	12.7	255.4	10.3	219.8	-13.9	236.4	7.6
share (%)	3.1		3.5		3.7		3.1		2.9	
D	1647.5	10.6	1740.8	5.7	1776.8	2.1	1798.7	1.2	1865.5	3.7
share (%)	24.5		26.0		25.9		25.3		22.9	
GR	51.1	-14.3	51.6	1.0	49.1	-4.8	49.7	1.2	48.3	-2.8
share (%)	0.8		0.8		0.7		0.7		0.6	
E	241.2	-3.9	235.8	-2.2	247.2	4.8	271.4	9.8	290.5	7.0
share (%)	3.6		3.5		3.6		3.8		3.6	
F	1119.0	2.7	1028.6	-8.1	1111.4	8.0	1168.6	5.1	1404.8	20.2
share (%)	16.6		15.4		16.2		16.4		17.3	
IRL	25.9	12.1	22.6	-12.7	21.8	-3.5	31.7	45.4	23.3	-26.5
share (%)	0.4		0.3		0.3		0.4		0.3	
I	2279.6	7.9	2214.8	-2.8	2200.8	-0.6	2359.9	7.2	2978.9	26.2
share (%)	33.9		33.1		32.1		33.2		36.6	
NL	105.7	8.6	105.3	-0.4	113.8	8.1	137.7	21.0	161.3	17.1
share (%)	1.6		1.6		1.7		1.9		2.0	
A	N/A	N/A								
share (%)	N/A									
P	431.1	13.7	405.8	-5.9	388.0	-4.4	310.8	-19.9	301.5	-3.0
share (%)	6.4		6.1		5.7		4.4		3.7	
FIN	N/A	N/A								
share (%)	N/A									
S	N/A	N/A								
share (%)	N/A									
UK	502.7	12.3	522.2	3.9	555.8	6.4	642.7	15.6	704.4	9.6
share (%)	7.5		7.8		8.1		9.0		8.7	

SOURCE:  eurostat

TABLE 4.1.6

Extra-EUR12 imports  
(million ECU)

	1990	t / t-1 (%)	1991	t / t-1 (%)	1992	t / t-1 (%)	1993	t / t-1 (%)	1994	t / t-1 (%)
EUR12	13782.5	15.5	16684.8	21.1	16592.1	-0.6	18008.9	8.5	19183.3	6.5
B / L	518.9	34.5	600.2	15.7	692.1	15.3	714.4	3.2	776.5	8.7
share (%)	3.8		3.6		4.2		4.0		4.0	
DK	307.9	21.1	438.6	42.4	389.3	-11.2	396.7	1.9	484.6	22.2
share (%)	2.2		2.6		2.3		2.2		2.5	
D	6899.2	18.6	8482.1	22.9	7665.9	-9.6	8653.0	12.9	8933.8	3.2
share (%)	50.1		50.8		46.2		48.0		46.6	
GR	29.4	24.1	40.8	38.8	50.7	24.3	65.4	29.0	61.8	-5.5
share (%)	0.2		0.2		0.3		0.4		0.3	
E	275.9	56.4	461.1	67.1	620.6	34.6	399.4	-35.6	409.5	2.5
share (%)	2.0		2.8		3.7		2.2		2.1	
F	2053.5	20.6	2278.3	10.9	2354.4	3.3	2492.8	5.9	2576.2	3.3
share (%)	14.9		13.7		14.2		13.8		13.4	
IRL	42.8	7.0	44.2	3.3	41.8	-5.4	46.7	11.7	48.7	4.3
share (%)	0.3		0.3		0.3		0.3		0.3	
I	716.4	3.3	1091.2	52.3	1389.4	27.3	1356.6	-2.4	1544.8	13.9
share (%)	5.2		6.5		8.4		7.5		8.1	
NL	1012.9	15.3	1118.6	10.4	1231.8	10.1	1478.7	20.0	1712.9	15.8
share (%)	7.3		6.7		7.4		8.2		8.9	
A	N/A	N/A								
share (%)	N/A									
P	14.4	7.5	21.6	50.0	25.7	19.0	31.9	24.1	32.3	1.3
share (%)	0.1		0.1		0.2		0.2		0.2	
FIN	N/A	N/A								
share (%)	N/A									
S	N/A	N/A								
share (%)	N/A									
UK	1911.0	-2.0	2108.1	10.3	2130.4	1.1	2373.1	11.4	2602.2	9.7
share (%)	13.9		12.6		12.8		13.2		13.6	

SOURCE:  eurostat

FIGURE 4.2.1

EUR15 production and  
producer price indexes  
(1990 = 100)

— Index of production  
— Producer price index

SOURCE:  eurostat

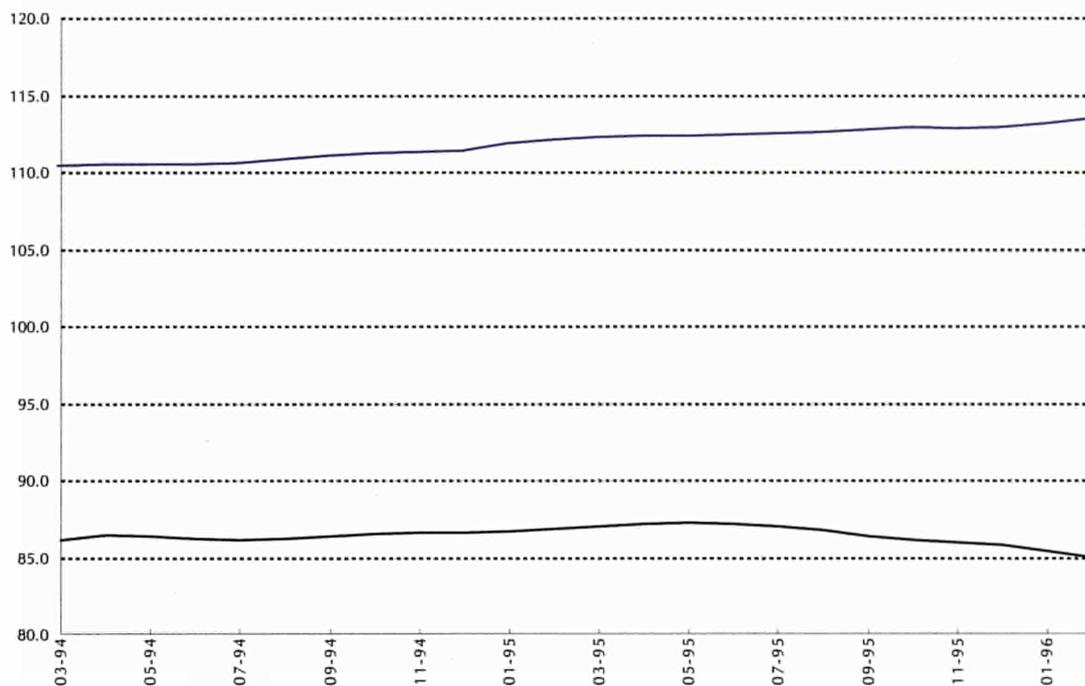
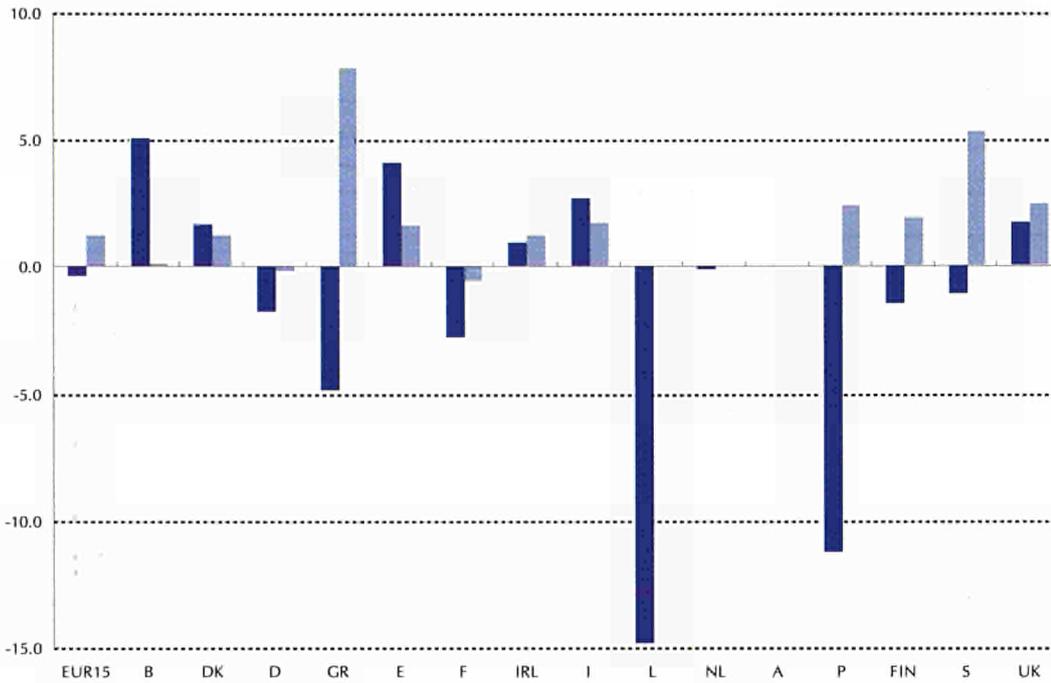


TABLE 4.2.1

Three month on three  
month and year on  
year growth rates for  
production and  
producer prices  
(%)

SOURCE:  eurostat

	Latest quarter available		Production index		Latest quarter available		Producer price index			
	t / t-1	t / t-4	t / t-1	t / t-4	t / t-1	t / t-4	t / t-1	t / t-4		
EUR15	12-95	⇄	02-96	-0.4	-1.5	12-95	⇄	02-96	0.3	1.3
B	08-95	⇄	10-95	5.1	3.1	08-95	⇄	10-95	0.1	0.1
DK	12-95	⇄	02-96	1.7	-0.5	12-95	⇄	02-96	0.6	1.2
D	12-95	⇄	02-96	-1.8	-6.5	01-96	⇄	03-96	0.1	-0.2
GR	11-95	⇄	01-96	-4.9	-11.2	12-95	⇄	02-96	1.4	7.8
E	12-95	⇄	02-96	4.1	-0.9	12-95	⇄	02-96	0.1	1.6
F	12-95	⇄	02-96	-2.8	-6.7	01-96	⇄	03-96	-0.1	-0.6
IRL	10-95	⇄	12-95	1.0	-6.2	12-94	⇄	02-95	-0.4	1.2
I	12-95	⇄	02-96	2.7	6.3	12-95	⇄	02-96	0.3	1.7
L	11-95	⇄	01-96	-14.8	0.5		⇄		N/A	N/A
NL	10-95	⇄	12-95	-0.1	-0.7	10-95	⇄	12-95	0.0	0.0
A		⇄		N/A	N/A		⇄		N/A	N/A
P	09-95	⇄	11-95	-11.3	-0.6	11-95	⇄	01-96	0.3	2.4
FIN	12-95	⇄	02-96	-1.5	-13.0	01-96	⇄	03-96	0.5	1.9
S	12-95	⇄	02-96	-1.1	-2.5	01-96	⇄	03-96	2.0	5.3
UK	12-95	⇄	02-96	1.7	-11.8	01-96	⇄	03-96	1.4	2.4



**FIGURE 4.2.2**

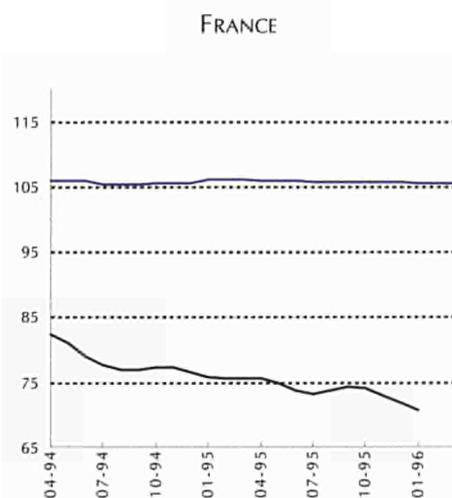
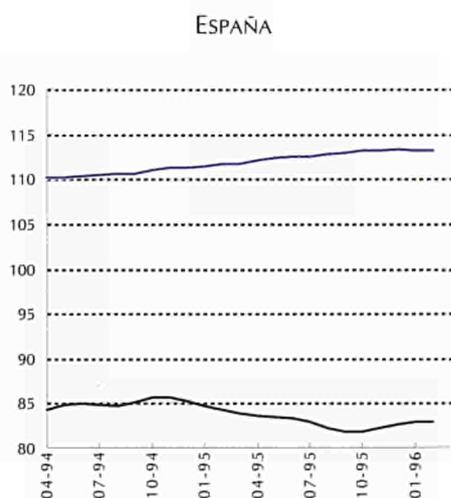
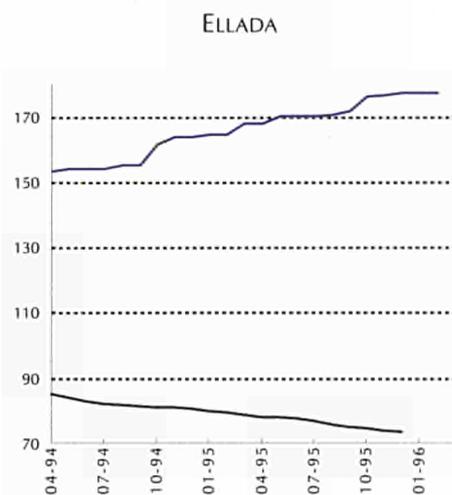
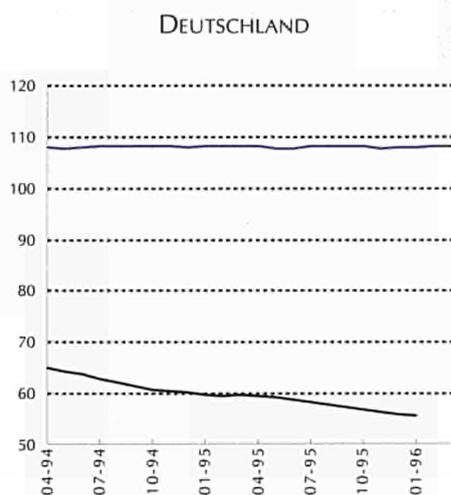
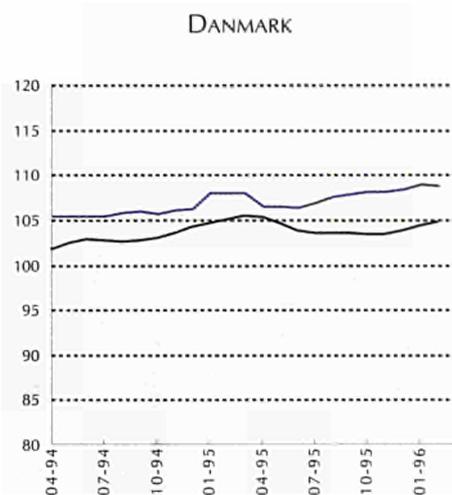
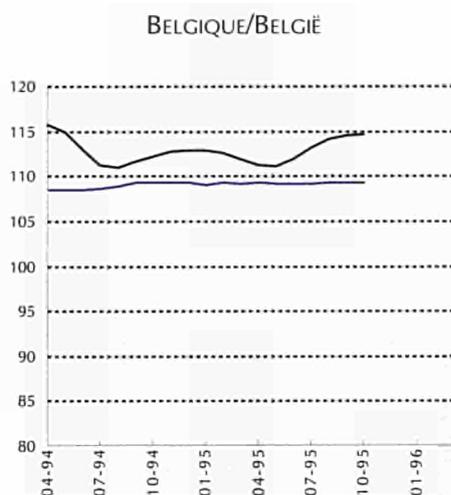
Year on year growth rates for production and producer price indexes, based on changes from the corresponding quarter of the previous year (%)

■ Production  
 ■ Producer prices

SOURCE: eurostat

FIGURE 4.2.3

Production and  
producer price indexes  
(1990 = 100)

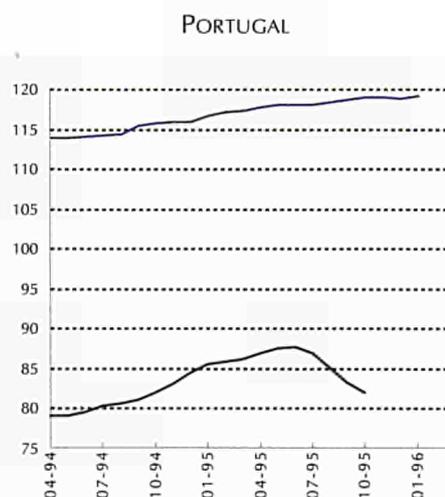
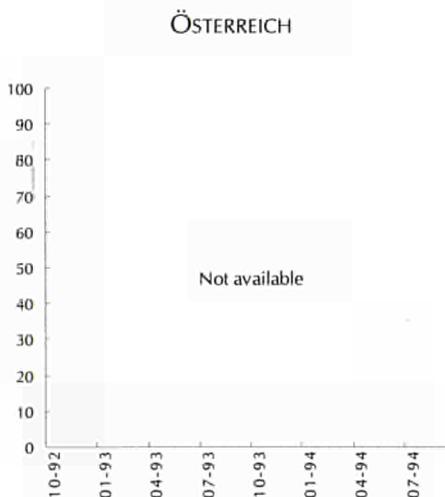
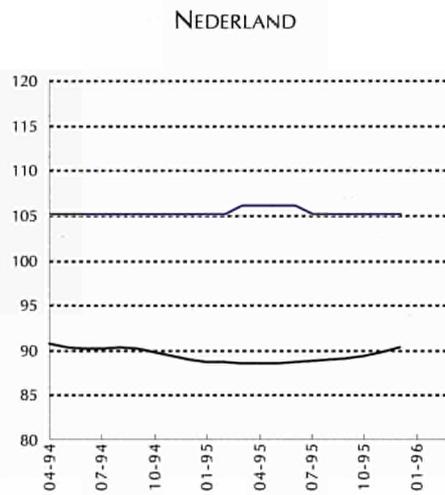
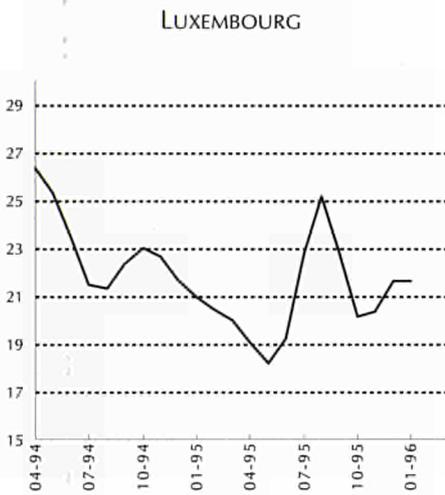
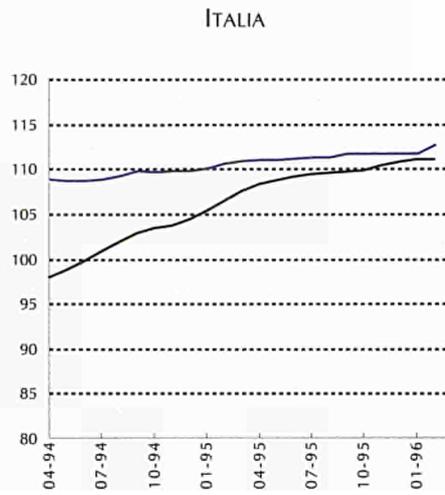
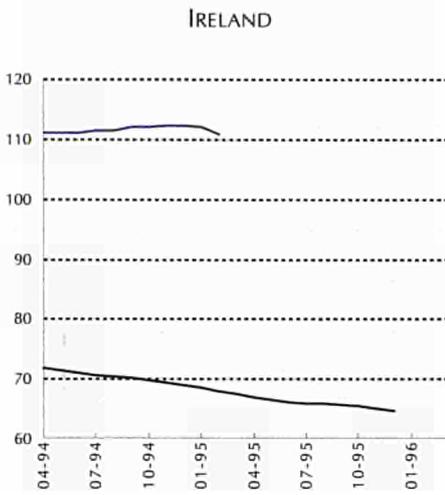


— Index of production  
— Producer price index

SOURCE: eurostat

FIGURE 4.2.3

Production and  
producer price indexes  
(1990 = 100)

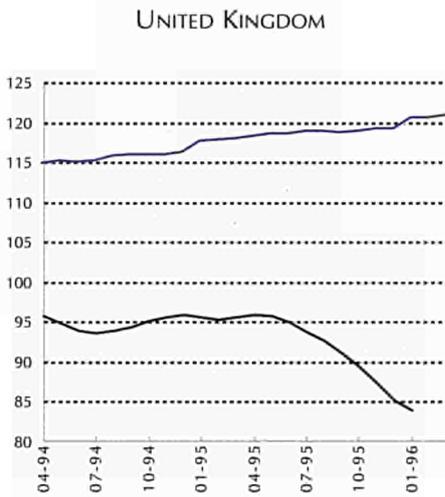
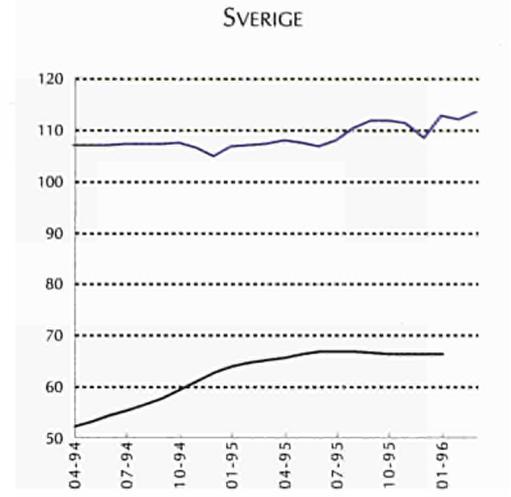
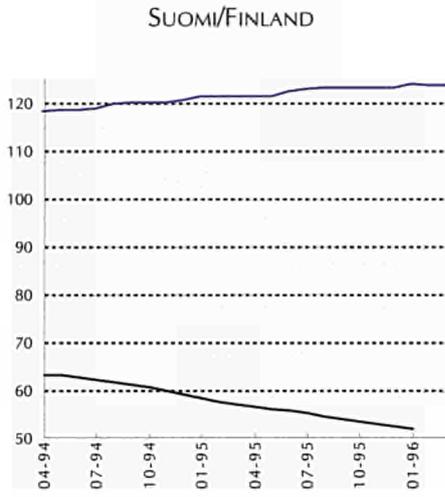


— Index of production  
— Producer price index

SOURCE:  eurostat

FIGURE 4.2.3

Production and  
producer price indexes  
(1990 = 100)



— Index of production  
— Producer price index

SOURCE:  eurostat

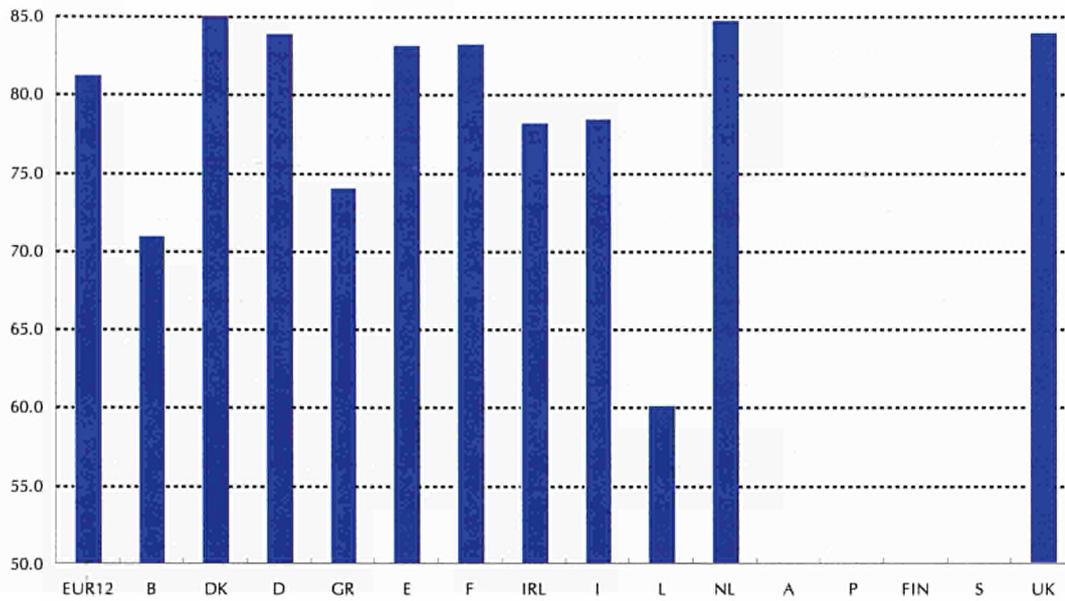


FIGURE 4.2.4

Capacity utilisation  
rates, first quarter  
1996  
(%)

SOURCE: DGII,  
BUSINESS SURVEY

	Annual growth rate: latest quarter, t/ t-4	Second quarter 1995	Third quarter 1995	Fourth quarter 1995	First quarter 1996
EUR12	0.9	80.2	81.1	83.1	81.2
B	-4.2	69.7	69.4	73.4	70.9
DK	-6.6	90.0	82.0	82.0	85.0
D	-0.1	81.9	79.4	83.2	83.8
GR	1.6	70.5	64.5	68.6	74.0
E	4.8	83.1	79.4	85.7	83.1
F	-1.1	83.0	85.0	86.1	83.2
IRL	-3.7	85.6	81.7	84.4	78.1
I	4.7	75.3	80.5	80.9	78.4
L	-40.0	100.0	100.0	100.0	60.0
NL	-2.6	86.2	83.8	86.8	84.7
A	N/A	N/A	N/A	N/A	N/A
P	N/A	N/A	N/A	N/A	N/A
FIN	N/A	N/A	N/A	N/A	N/A
S	N/A	N/A	N/A	N/A	N/A
UK	2.6	85.7	85.9	86.9	83.8

TABLE 4.2.2

Capacity utilisation  
rates  
(%)

SOURCE: DGII,  
BUSINESS SURVEY

FIGURE 4.2.5

Trade indicators,  
trend cycle  
(%)

— Export value  
— Import value  
- - - Terms of trade

SOURCE:  eurostat

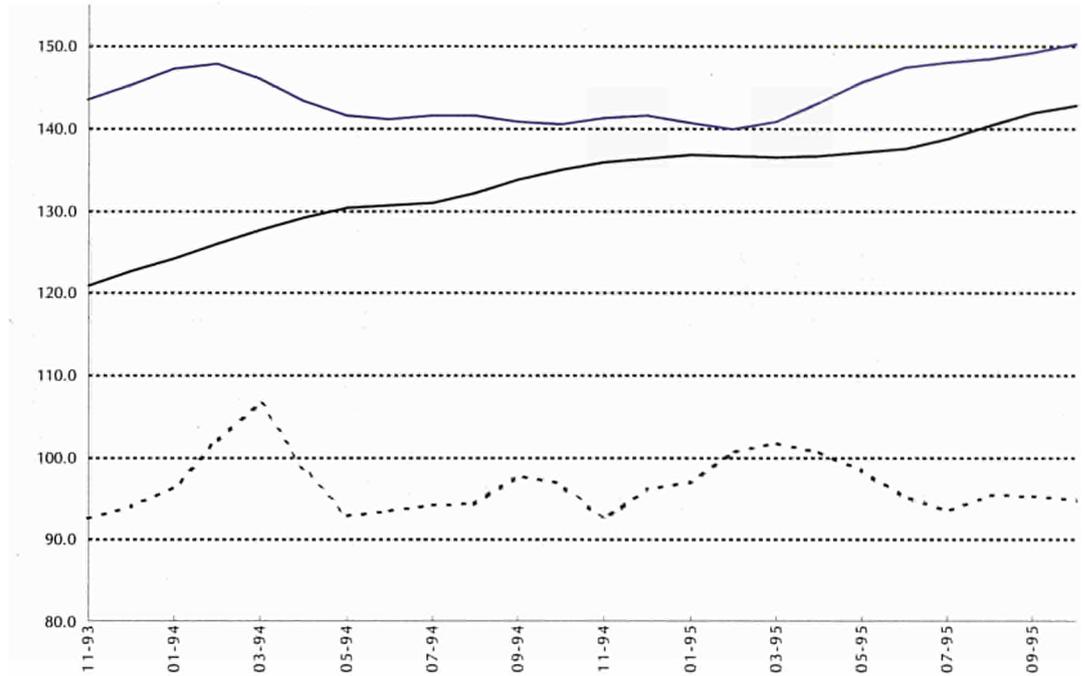


TABLE 4.2.3

Three month on three  
month growth rates for  
trade indicators, in ECU  
terms  
(%)

SOURCE:  eurostat

	Latest quarter available	Exports		Imports		Terms of trade
		Value	Volume	Value	Volume	
EUR12	08-95 ⇌ 10-95	7.0	9.4	0.5	-0.5	-0.6
B / L	06-95 ⇌ 08-95	13.2	61.4	-0.3	2.1	-2.9
DK	06-95 ⇌ 08-95	0.7	-1.3	2.6	2.2	4.1
D	06-95 ⇌ 08-95	2.6	3.4	2.2	1.7	3.8
GR	06-95 ⇌ 08-95	2.2	14.3	-5.1	-8.0	6.1
E	06-95 ⇌ 08-95	-6.3	-9.6	0.2	-3.1	-5.4
F	06-95 ⇌ 08-95	1.0	-2.5	1.6	1.4	4.8
IRL	05-95 ⇌ 07-95	-4.8	-4.6	2.0	11.7	4.2
I	06-95 ⇌ 08-95	2.8	2.0	5.4	2.8	-6.9
NL	06-95 ⇌ 08-95	-5.5	-5.7	3.8	6.0	3.6
A	⇌	N/A	N/A	N/A	N/A	N/A
P	06-95 ⇌ 08-95	0.1	-0.5	4.9	6.0	6.6
FIN	⇌	N/A	N/A	N/A	N/A	N/A
S	⇌	N/A	N/A	N/A	N/A	N/A
UK	06-95 ⇌ 08-95	0.1	1.0	5.0	6.0	-4.2

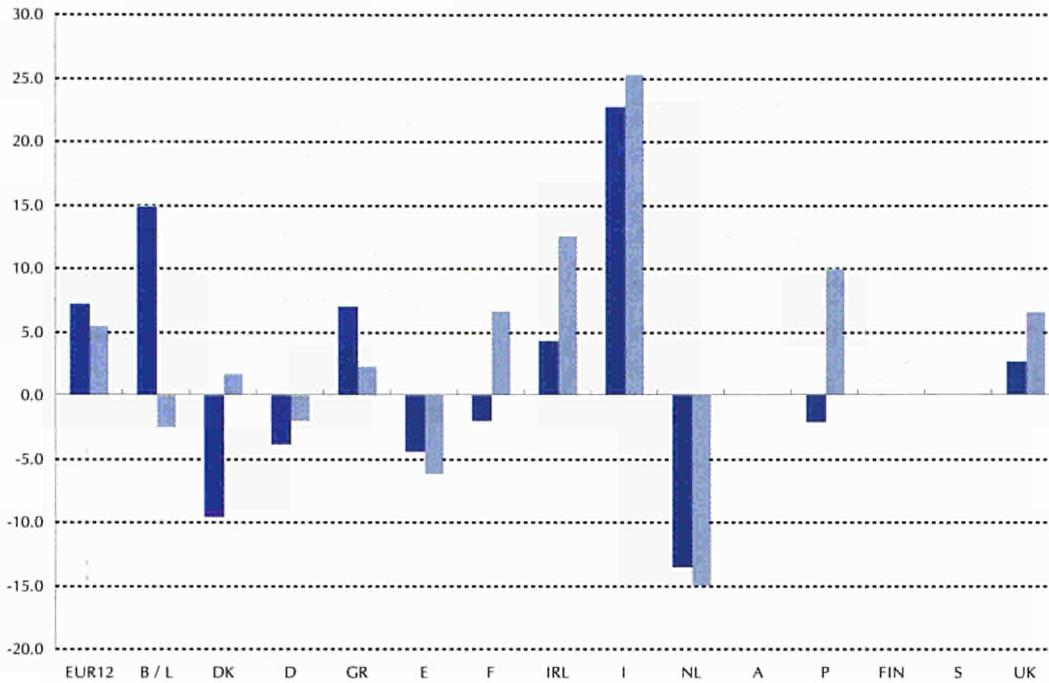


FIGURE 4.2.6

Year on year growth rates for trade indicators, based on changes from the corresponding quarter of the previous year, in ECU terms (%)

■ Export value  
■ Import value

SOURCE: eurostat

	Latest quarter available		Exports		Imports		Terms of trade
	Value	Volume	Value	Volume			
EUR12	08-95 ⇒ 10-95	7.2	6.8	5.4	3.8	-1.2	
B / L	06-95 ⇒ 08-95	14.8	23.8	-2.5	0.7	-4.1	
DK	06-95 ⇒ 08-95	-9.7	-12.8	1.7	2.1	4.2	
D	06-95 ⇒ 08-95	-3.9	-1.3	-2.0	-0.6	-1.4	
GR	06-95 ⇒ 08-95	7.0	2.5	2.3	0.1	1.6	
E	06-95 ⇒ 08-95	-4.5	-15.9	-6.2	-21.5	-5.5	
F	06-95 ⇒ 08-95	-2.1	-7.3	6.6	4.7	3.4	
IRL	05-95 ⇒ 07-95	4.3	-0.1	12.5	10.5	1.7	
I	06-95 ⇒ 08-95	22.7	6.6	25.2	13.0	3.9	
NL	06-95 ⇒ 08-95	-13.6	-13.7	-15.1	-15.1	0.8	
A		N/A	N/A	N/A	N/A	N/A	
P	06-95 ⇒ 08-95	-2.1	-6.2	9.9	8.5	3.0	
FIN		N/A	N/A	N/A	N/A	N/A	
S		N/A	N/A	N/A	N/A	N/A	
UK	06-95 ⇒ 08-95	2.6	3.1	6.5	-1.3	-7.5	

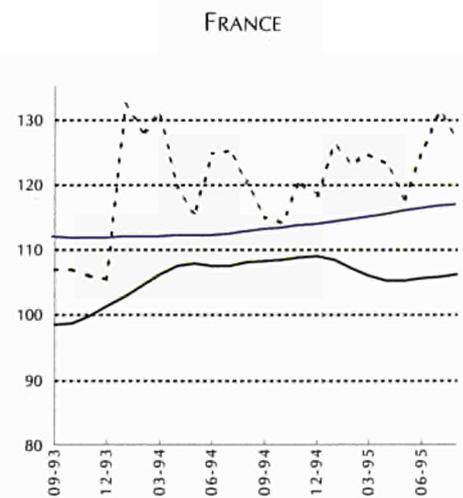
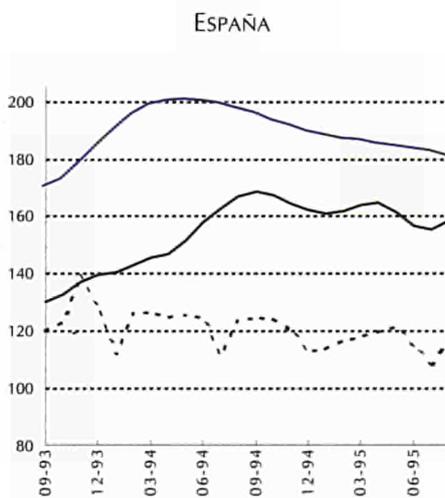
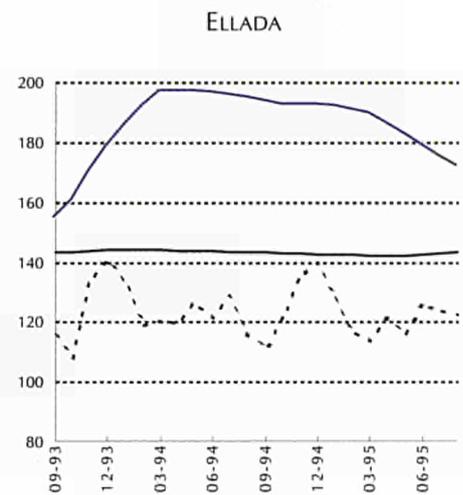
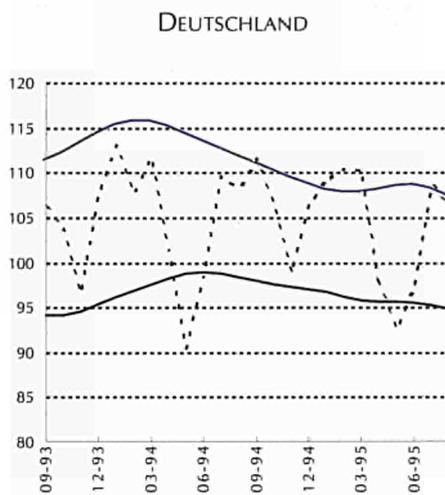
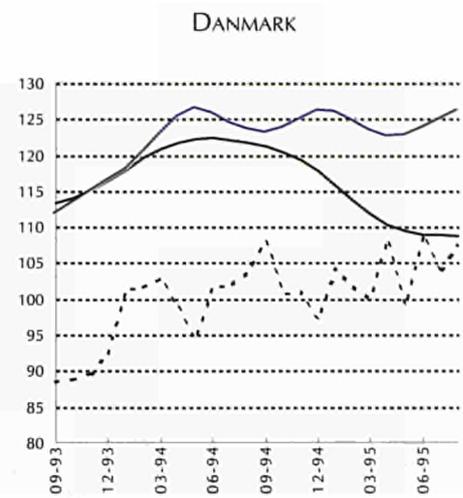
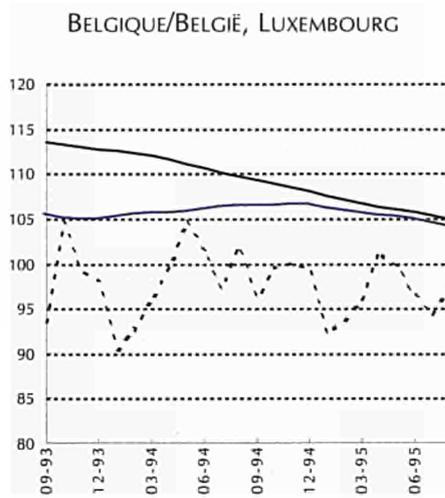
TABLE 4.2.4

Year on year growth rates for trade indicators, based on changes from the corresponding quarter of the previous year, in ECU terms (%)

SOURCE: eurostat

FIGURE 4.2.7

Trade indicators,  
trend cycle  
(1990 = 100)

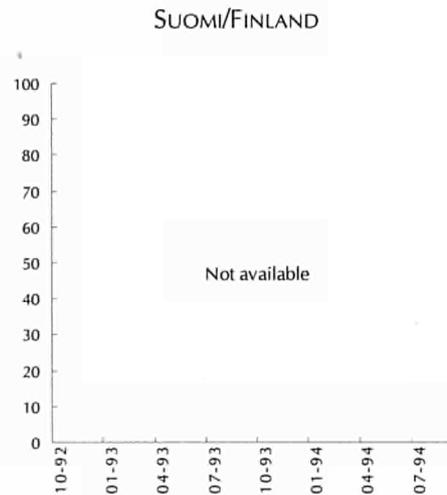
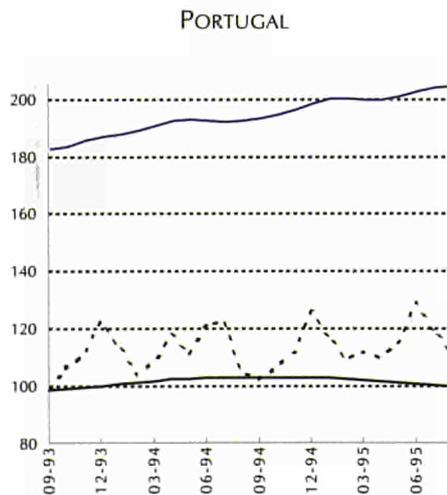
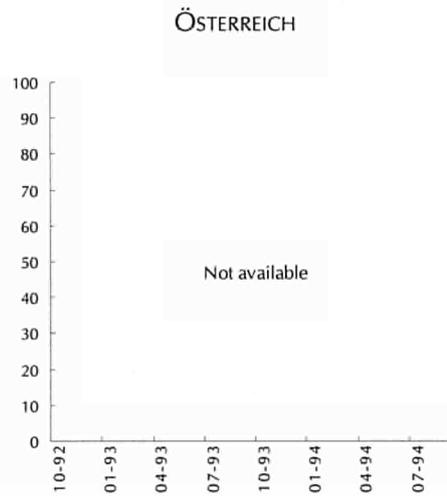
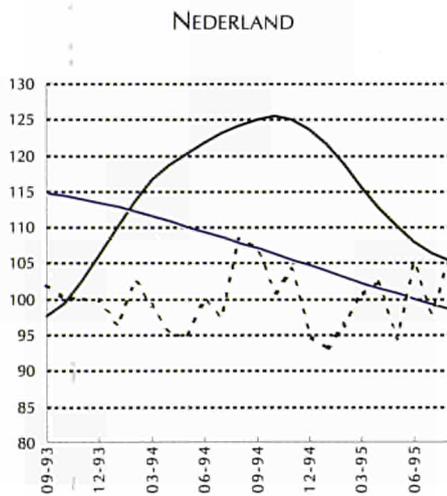
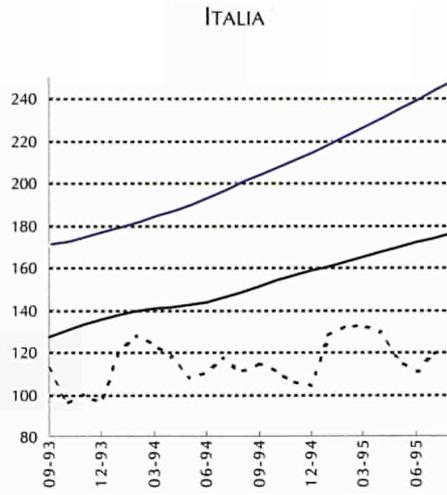
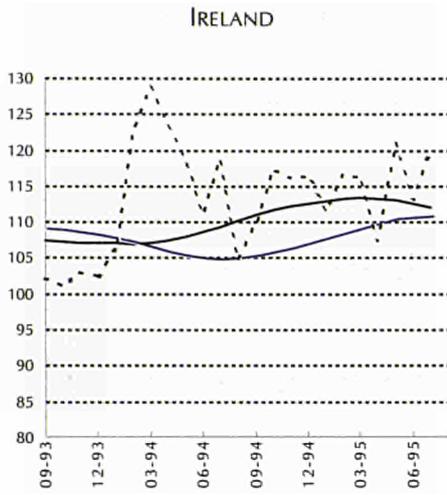


— Export value  
— Import value  
- - - Terms of trade

SOURCE: eurostat

FIGURE 4.2.7

Trade indicators,  
trend cycle  
(1990 = 100)

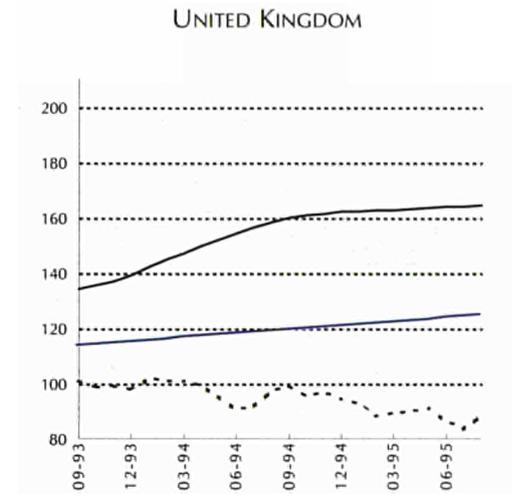
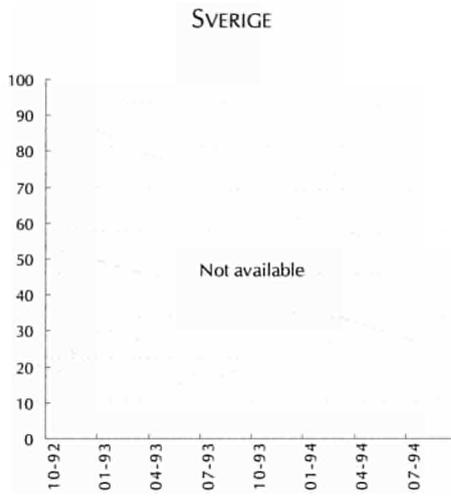


- Export value
- Import value
- - - Terms of trade

SOURCE:  eurostat

FIGURE 4.2.7

Trade indicators,  
trend cycle  
(1990 = 100)



- Export value
- Import value
- - - Terms of trade

SOURCE:  eurostat



#### INDUSTRY CLASSIFICATION SYSTEM

The economic activities used in this publication are defined in the revised Classification of Economic Activities within the European Communities, Nace Rev.1. This classification was laid down in a Council Regulation in 1990 (OJ L293 24th October 1990). It should be noted that many series before 1990 and a large amount of annual data even between 1990 and now had to be converted from the old classification Nace 1970. This estimation process can reduce the reliability of the data. Broad industrial groups that are used in Section 2 of this publication have the following definitions in terms of NACE Rev.1.

#### TOTAL INDUSTRY

C + D + E

#### INTERMEDIATE GOODS INDUSTRIES

13.1, 13.2, 14.1-14.5, 15.6, 15.7, 17.1-17.3, 20.1-20.5, 21.1, 21.2, 24.1-24.3, 24.6, 24.7, 25.1, 25.2, 26.1-26.8, 27.1-27.5, 28.4-28.7, 31.2-31.6, 32.1, 34.3, 37.1, 37.2, 41.0

#### CAPITAL GOODS INDUSTRIES

28.1-28.3, 29.1-29.6, 30.0, 31.1, 32.2, 33.1-33.3, 34.1, 34.2, 35.1-35.3

#### DURABLE CONSUMER GOODS INDUSTRIES

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

#### NON DURABLE CONSUMER GOODS INDUSTRIES

15.1-15.5, 15.8-16.0, 17.4-17.7, 18.1-18.3, 19.1-19.3, 22.1-22.3, 24.4, 24.5, 36.4-36.6

#### STATISTICAL SOURCES

Most of the data in this publication is harmonised data supplied to Eurostat by the EU Member States. The exceptions are:

- 1) The capacity utilisation series which come from the business surveys carried out on behalf of the Directorate General for Economic Affairs of the Commission (DG II).
- 2) The estimates for the latest years' structural data, which are supplied by the DEBA European Economic Interest Group:  
DEBA GEIE, EBBC F, 4-6, Route de Trèves, L-2633, Senningerberg, Luxembourg;  
tel: (352) 34 10 40 01.
- 3) The data for the USA and Japan, which are supplied by the OECD.

Data sources are indicated for each statistical table. Every effort has been made to include data for the EUR15 Member States. The indices from 1991 onwards are on a post-unification basis and include East-Germany. However the structural data is still on a pre-unification basis.

#### 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 (in principle, at factor cost). The indices are adjusted in two stages; firstly to take account of the varying number of working days in the month and secondly by seasonal adjustment with TRAMO / SEATS - the adjustment also takes account of one-off fluctuations.

The index of producer prices shows (in national currencies) the changes in the ex-works selling prices of all products sold on the domestic markets of the various countries. The EU indices refer to overall weighted price changes. There are not yet indices for Austria. No seasonal adjustment is carried out on these indices.

For the indices of imports and exports, external trade data of 9000 industrial products were grouped according to the industrial NACE Rev.1 branch to which they belong. This grouping can cause certain inaccuracies in the data, which may reduce the reliability of foreign trade series. The value indices are all in ECU terms.

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

The capacity utilisation series come from quarterly European Union business surveys, and are not seasonally adjusted.

#### GROWTH RATES

The changes which are given in the tables show two different growth rates. The first being for the latest three months data compared to the previous three months data - here a seasonally adjusted series is used. The second growth rate is for the latest three months data compared to the same three months of the previous year - here a series only adjusted for the number of working days is used. Estimates are sometimes made (especially to create a EUR15 total).

#### GRAPHS

The graphs show the trend cycle, i.e. seasonally adjusted series where additionally the irregular fluctuations have been excluded (using the program TRAMO / SEATS).

#### STRUCTURAL DATA

Data for structural statistics are in current ECU unless otherwise stated.

Data for value added at factor cost, production, labour costs and employment come from annual enquiries conducted by Member States involving all enterprises with 20 or more employees. The exceptions to this are Spain and Portugal (up to 1990) where the coverage is for local units of all sizes.

The employment data relates to the number of persons employed excluding home workers. The definitions are standardised and so the figures are comparable across industries and countries.

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 Eurostat's data have been filled by estimates supplied by DEBA GEIE and by Eurostat for the three new Member States. Thus EUR15 totals often contain estimates for missing countries. Estimates are again shown in bold.

#### SIGNS AND ABBREVIATIONS

EUR15: European union of 15

EUR12: European union of 12

B / L: Belgo-Luxembourg Economic Union

ECU: European currency unit

Billion: thousand million

N/A: not available

%: percent

1990 = 100: reference year

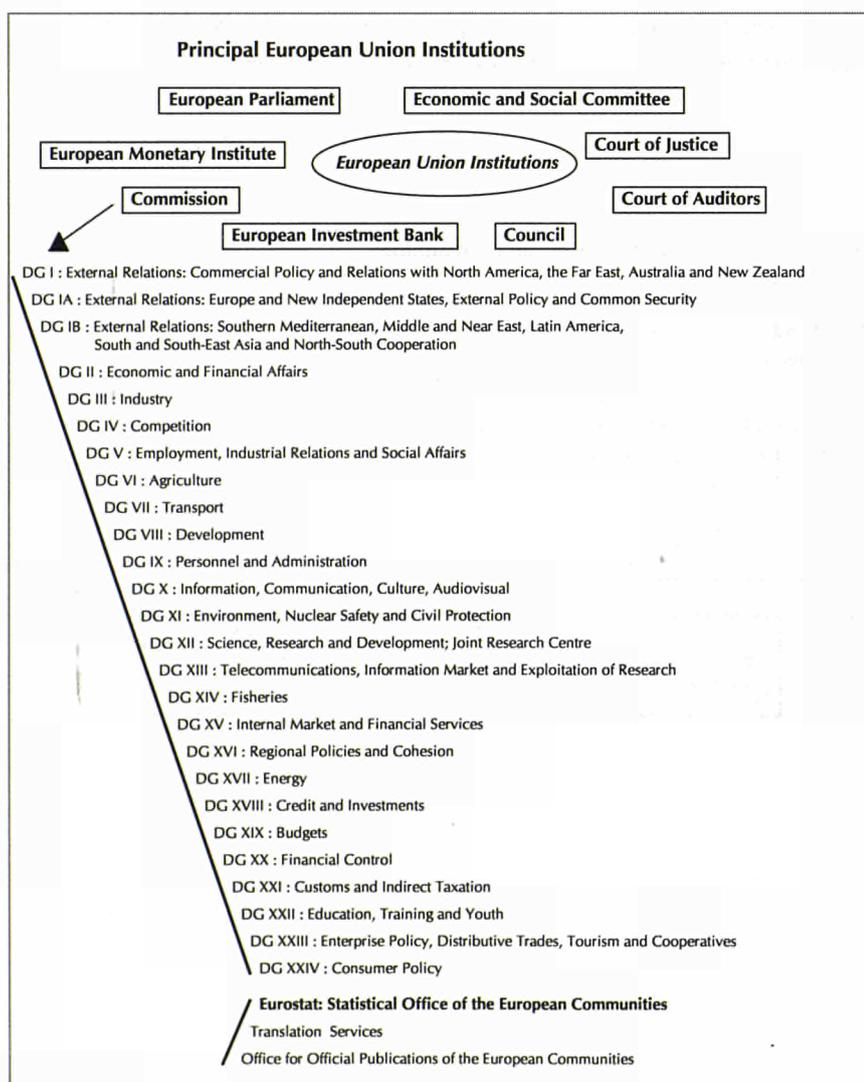




**THE STATISTICAL OFFICE:**

Eurostat, the Statistical Office of the European Communities, is one of the Directorates- General (DGs) of the European Commission: DG XXXIV. In the Directory of the European Commission, Eurostat is not listed in the same way as most DGs. This is because it is in fact a support service for the other DGs, as are the Translation Service and the Publications Office. Its purpose is to provide a high-quality statistical information service for the European Union. Statistical information is increasingly important in the process of European integration, not only for national governments and the European Institutions, but also for enterprises and the citizens of the European Union.

General description of unit D2, its structure and its role as a statistical support agency for the DGs



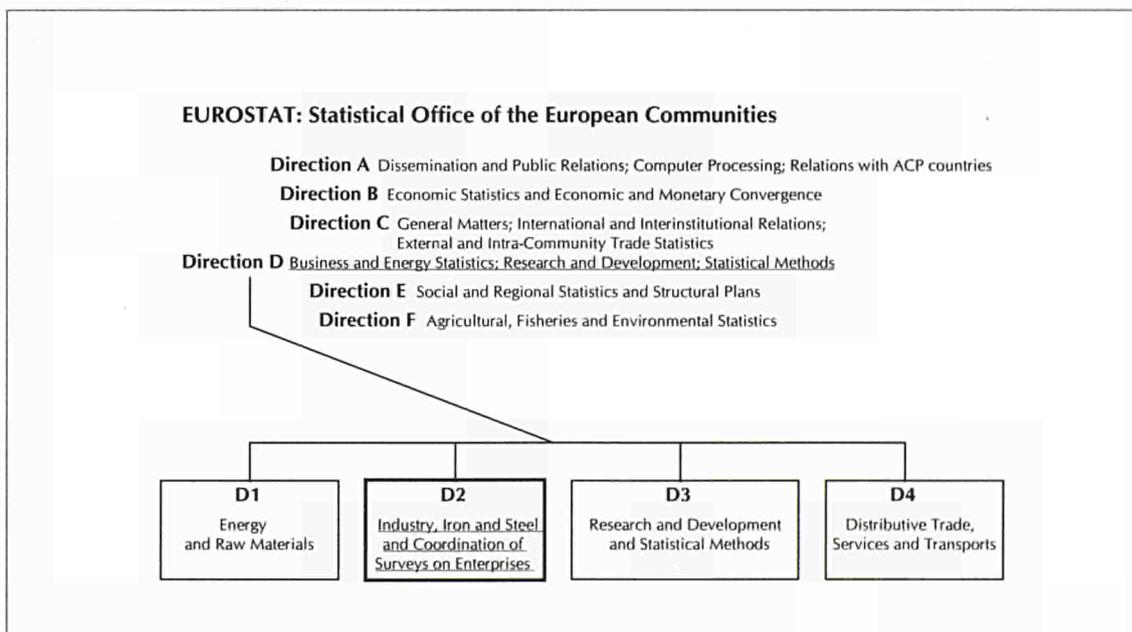
<b>IN THIS SECTION:</b>	
<b>DESCRIPTION OF THE STATISTICAL OFFICE</b>	73
<b>DESCRIPTION OF UNIT D2</b>	75
<b>FREQUENTLY ASKED QUESTIONS</b>	81
<b>USEFUL ADDRESSES</b>	84

Eurostat's function is fourfold. Firstly, it has to provide the European Institutions, in particular the Commission, the political authorities and their partners with the statistical information necessary for applying, monitoring and assessing EU policies. For example, statistics provide factual information on European Monetary Union, the Single Market/Internal Market and the European Social Area. Secondly, Eurostat must also disseminate information among European businesses, other economic and social bodies and, finally, the European public at large. Thirdly, Eurostat is responsible for developing a European Statistical System, which, by introducing standards, methods and frameworks, should provide the European Union with comparable, adequate and reliable statistics on the European Union. Finally, Eurostat is helping to extend statistical systems in develop-

ing countries and countries moving towards a market economy. The Director-General of Eurostat is Mr. Yves Franchet.

The various Directorates which make up Eurostat have been organised in a way designed to meet these objectives. Directorate D - Business and energy statistics, research and development - is responsible for providing a large number of users with a wide range of useful statistics on its area of competence. The head of Directorate D is Mr. Photis Nanopoulos.

Directorate D consists of four units: Energy and raw materials; Industry, iron and steel and coordination of surveys on enterprises; Research, development and statistical methods; Distributive trades, services and transport.



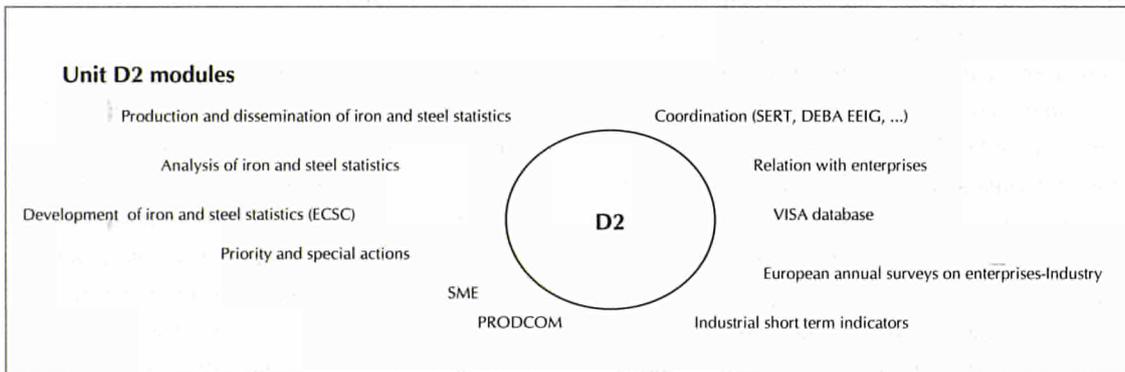
**UNIT D2:**

Unit D2 (Industry, iron and steel and co-ordination of surveys on enterprises) has a number of objectives. It has to fulfil the needs of EU policies (development of the statistical infrastructure: regulations, SMEs, structural funds, subcontracting, globalisation, etc.), meet the requirements of businesses (sectoral analyses, production (PRODCOM), simplification of replies, administrative sources, SERT, etc.) and, finally, co-ordinate business surveys. It has therefore developed special relations with its "clients", i.e. certain DGs, most of the European federations of industrial trade associations (FEBIs) and other relevant bodies. The Head of Unit D2 is Mr. François de Geuser.

In order to fulfil its function as thoroughly as possible, Unit D2 focuses on four fields: structure, trends, products and sectors. Each field depends on a solid legal basis, which in some cases dates

The field of Structure covers the co-ordination of DEBA EEIG and SERT, relations with enterprises, the VISA database, the annual European survey of industrial firms, the SME project and certain special, priority measures (e.g. the Globalisation project, the Structural Funds project, the Subcontracting project and the Biotechnology project).

DEBA EEIG (Data for European Business Analysis) is a European Economic Interest Grouping (EEIG) which was set up on 17 March 1992. It is a structure for co-operation between the main European operators, producers and/or users of business statistics at European level. At present membership falls into two categories: official statistics (Eurostat) and the European federations of industrial trade associations (FEBIs). In this context, the role of Unit D2 is to co-ordinate DEBA EEIG. Likewise, Unit D2 manages the VISA database and provides



back a long time (e.g. the ECSC Treaty for the iron and steel industry), and each meets some of the regular and specific demands addressed to D2. Demand has been structured in the form of modules. Each module falls under one of these four fields and contains details of all the projects concerned. Readers wishing to obtain the data mentioned below should contact Datashop Luxembourg (tel. +352/ 43.35.22.51., fax +352/43.35.22.221.).

support for (Commission) users of the database. The VISA database is an older project. It was set up at the beginning of the 1980s following a request by DG II and DG III, which wanted recent estimates of structural data. The purpose of the project is to develop sectoral analysis techniques and exploit new statistical sources. The DEBA database, which is produced by DEBA EEIG and which covers three areas (industry, national accounts and short-term indicators), has taken over this role but has kept the name VISA for the strictly internal dissemination of data within the Commission. The DEBA/VISA database is a meso-

economic database (using NACE 70 - the statistical classification of economic activities within the European Community - at 3-digit level) on the industries of the European Union, the United States and Japan, which are classified according to their main activity. It provides statistical data for 27 variables (e.g. production, employment, turnover, external trade figures, etc.) and includes time series beginning in 1976 or 1980, depending on what is available, which are extended using estimates for the more recent years. It is updated twice a year (June and December). The database should provide NACE Rev. 1 statistical data for the December 1996 revision. For more detailed information on DEBA EEIG, contact François de Geuser: +352/43.01.33.220 or Louise Allard: +352/34.10.40.00.

The Structural Survey is a project aimed at providing a picture at a given moment in time of the population of European industrial enterprises (indicators on structure, activity, competitiveness and the performance of European industries). The project involves collecting structural data on firms from the Member States of the European Economic Area and Switzerland, processing them, analysing them and disseminating them. The statistical data are grouped together in the DAISIE database (Data on Activities and Industrial Structures In Europe) and are published in "Structure and Activity of Industry, Annual inquiry - Main results". The Structural Survey project brings together in the computerised reference base DOMINIQUE the methodologies used by the above-mentioned states to calculate structural data. The methodologies are published in "Documentation on the methodologies concerning industrial structural statistics of the Member States". A methodological manual is currently being drawn up under the project. It will give the definitions of the variables and other elements used in the structural surveys and also explain the system of European structural statistics. The project is also responsible for the rules on structural statistics. At present a new regulation on structural

statistics on enterprises is being drawn up. This will replace the current legal basis dating from 1964 and 1972. It will include the services sector and should be adopted this year. For further information on the Structural Survey, contact Marie-Paule Benassi: +352/43.01.32.297.

SERT is a project designed to promote standard statistical modules for accounting systems, common formats for sending messages by Electronic Data Interchange and the development of the computer infrastructure of NSIs. If the computerised accounting systems of businesses could be linked to the database systems of the NSIs using telecommunications methods, the burden on the businesses surveyed could be reduced, as could the NSIs' collection costs, and the quality of the statistics could be raised (by greater harmonisation and speeding-up the response time). For more information on SERT, contact François de Geuser: +352/43.01.33.220.

SME is a project set up in 1986 in response to the considerable demand for data by DG XXIII. SME is in two main parts: tabular data and economic analyses of SMEs (previously SME indicators). Tabular data involves the collection from the Member States, processing, analysis and publication of statistical data on manufacturing industries and services by employment size class. The data are entered in the SME data base and published in "Enterprises in Europe". The economic analyses comprise longitudinal studies based on enterprise panels, special studies and work on enterprise demography, the definition of SMEs and regional data. For more information, contact Marie-Paul Benassi: +352/43.01.32.297 or Eric De Brabanter: +352/34.10.40.04.

Globalisation is a project set up in December 1992 and designed to meet the ever growing demand for globalisation indicators. Globalisation describes the economic phenomena linked to the world-wide productive and distributive activities of enterprises. The Globalisation project has very many objectives: on one hand, the project must provide the Commission with the most appropriate data, as far as possible harmonised, for the portrayal of certain aspects of globalisation; and on the other hand it has to prepare and co-ordinate methodological surveys on globalisation indicators and on the impact of globalisation on business statistics. The results of the work of the working party appear in "The Globalisation Newsletter", which is published on a non-regular basis. For further information on Globalisation contact Marie-Paule Benassi: +352/43.01.32.297.

Subcontracting is a project carried out jointly by Eurostat, DG XXIII and DG III. The purpose of the project is to develop, in conjunction with the Member States, a harmonised statistical information system which makes it possible to measure the development of subcontracting within European industry. Pilot surveys have been carried out in ten volunteer Member States to test a common definition of subcontracting, assess its economic importance and form a clearer picture of industrial relations between subcontractors and principals. The initial estimates have been published for three economic sectors (automobile, textiles/clothing and aerospace) and a publication setting out the results of the pilot surveys will be available in the last quarter of 1996. For further information on the Subcontracting project, contact Patricia Bouchaud: +352/43.01.35.073.

The field of Trends concerns Industrial Short-Term Indicators (ISTI). The ISTI project has existed for over 20 years and was set up to meet internal requirements for the most recent possible data and estimates on industries (including the construction industry). The legal basis consists of the 1972 Directive for industry and the 1978 Directive for

the construction industry. The statistical base for short-term data is relatively different from that of structural data (the questionnaires are shorter, sampling is used systematically and the size of the samples is generally smaller). This explains why the structure of short-term data is somewhat different from that of structural data (fewer variables, the data are indices but they use the same classification). The ISTI project collects short-term data from the Member States, processes them (verification, calculation of data for the EU etc.), analyses them and disseminates them. The data collected are mostly indices (for production, prices, employment, pay, turnover, etc.) and the data published are all indices (same variables, with 1990 as the base year and a revision every five years).

These data are used to identify and analyse short and medium-term trends, to pinpoint and even anticipate the turning points in economic cycles and, finally, to update and estimate structural data. The project is also responsible for adapting regulations on short-term statistics. A new regulation on short-term statistics on enterprises is currently being drawn up and should make it possible to meet users' needs for the year 2000 and beyond. The data are entered in the LINDAREV database (NACE Rev.1). Since the construction industry comprises variables specific to that industry, it is dealt with separately by ISTI but is included with the other industries in LINDAREV. ISTI is also responsible for gathering together in the MONA LISA computerised reference base the methodologies used by the Member States for drawing up short-term indicators. The data are published monthly in "Industrial Trends" and in "Statistics in Focus". ISTI also publishes supplements to "Industrial Trends" which use the methodology applied by the Member States for calculating one or two of their short-term indicators. For further information on ISTI, contact Berthold Feldmann: +352/43.01.34.401.

Products is a field which concerns the PRODCOM project. This project was set up in December 1991 and is an important stage in a programme launched in 1975 with the aim of gradually harmonising data on the volume and value of the production of industrial products. PRODCOM covers almost 5 700 products, which are defined on the basis of the CN (Combined Nomenclature) classification of external trade, data on which are collected quarterly for some and annually for the others. PRODCOM has three objectives: management of the List of Products (detailed description of the product in all official languages, its correspondence with the CN classification, its physical unit and its definition at NACE Rev.1 level), the performance of a data control programme and its adaptation to the transmission system, its updating to stay in line with amendments to the List itself and its development in accordance with data quality requirements, and, finally, the collection of statistical data on products from the Member States, the processing of these data and the creation, management and dissemination (by EURO-PROMS) of the database on products. PRODCOM is in regular contact with Unit C4 (External and intra-Community trade) and B6 (Macro-economic classification and statistical and accounting co-ordination). For further information on PRODCOM, contact Dorte Schmidt-Brown: +352/43.01.34.072.

The field of Sectors deals with the iron and steel industry, the chemicals, rubber and plastics sector (RISC project), all industrial sectors (the Panorama Project) and the competitiveness of European enterprises (Competitiveness Project).

The Iron and Steel Industry is the oldest statistical activity of Eurostat. It covers three modules: the development of iron and steel statistics, the analysis of iron and steel statistics, the production and dissemination of iron and steel statistics. The legal basis for the activity is the ECSC Treaty of 1952 (European Coal and Steel Community). Under the Treaty, the expression "iron and steel" covers the

main raw materials for the production of steel (i.e. iron ore and scrap), pig iron and crude steel, finished rolled steel products and certain finished products which have undergone additional processing. This activity is responsible for the collection, processing, analysis and publication of iron and steel statistics. The data covered by the surveys are limited to the quantitative aspects of the market. The activity has to ensure the harmonisation of definitions which change with the technological and commercial developments of industry. It also involves analysing external trade data for ECSC products. In each Member State, the iron and steel activity organises special studies on steel consumption by user branch and by product to enable the Commission departments to draw up steel consumption forecasts. The data are published in monthly, quarterly and annual periodicals. For further information on the Iron and Steel Activity contact Douglas Koszerek: +352/43.01.32.745.

RISC (French acronym for the information network on the chemical industry) is a project involving co-operation between DG III, Eurostat and the European industrial federations of the chemicals, rubber and plastics sector. RISC was set up in November 1993 with the aim of creating genuine co-operation between the Commission and European enterprises via their federations. The purpose of the network is therefore to promote the exchange of statistical information between its members (e.g. legislation, sectoral studies, etc.). Unit D2 is responsible for providing the network with statistical information. It collects as many statistics as possible on the sector (e.g. from Eurostat databases, Member States' own databases, data from federations and industries, etc.), processes them (e.g. checks, estimates, etc.) and analyses them (e.g. sectoral competitiveness analyses). The data are entered in the CHIMERE database (product statistics) and the CHIMSTAT database (sectoral statistics and analyses carried out on the basis of these data). RISC also comprises computerised reference bases: LEGICOM (European commercial legislation on this sector) and LEGICHIM (European legislation other than commercial legislation on this sector). The four bases will be available on CD-ROM from 1997. For further information on RISC, contact Jean-Michel Renaux (DG III C4): +32 2/296.45.70, or Catherine Ahsbahs: +352/42.31.13.721.

Panorama is a project involving the co-operation of DG III and Eurostat. It was launched in 1988 with the aim of collecting as much statistical information as possible on as many manufacturing industries and services as possible. The comments and specific analyses are drawn up by external consultants and experts from the sector. The overall management and co-ordination of the project are also carried out by an external consultant, namely DRI of Brussels. The data sources are the databases of Eurostat (VISA: industrial indicators, LINDAREV: short-term industrial indicators, COMEXT: external trade data, TREND: short-term external trade indicators and SME: small and

medium-sized enterprises), DG III (DABLE: classification of European enterprises by turnover) and certain Commission departments for statistics on specific sectors, the various European trade associations and, finally, the consultants themselves. Each year the project publishes the "Panorama of EU Industry", which in February 1994 won the 1993 European Information Association award for European Information sources in the official publications category. On the publication of the 6th edition on 29 February 1996, Martin Bangemann, the European Commissioner responsible for industry, stated that it was a unique statistical tool which provided an overall, analytical picture of the current state of European industry. The data contained in the "Panorama of EU Industry" are also published on CD-ROM, of which there are two versions: the first contains only those data which appear in the paper publication, while the second contains the same information but also adds details for each Member State, data from the SME databases and SEC 1 (National Accounts) plus a series of texts taken from DG III publications. For further information on Panorama, contact Berthold Feldmann; +352/43.01.34.401, or Tim Allen: +352/43.01.35.098.

The Panorama Supplement is a project which was set up to meet repeated demands by users of the "Panorama of EU Industry" for more regular access over the year to the latest data available and to data showing the latest short-term trends. The Panorama Supplement is a bimonthly publication which was published for the first time in January 1993. It currently consists of analyses of macro-economic trends in the EU, general industrial trends and trends in two specific industries (twelve industries are dealt with over the year, including the most important manufacturing industries) and one or two articles dealing with the subjects of specific interest to Unit D2. The Panorama Supplement was "Highly Commended" in the 1995 European Information Association Awards for European information sources in the official publications category by the European Information Association in February 1996. For further information on the Panorama Supplement contact Berthold Feldmann: +352/43.01.34.401 or Tim Allen: +352/43.01.35.098.

Competitiveness is a project arising directly from the Treaty on European Union. Under the Treaty, the Commission is required to monitor European competitiveness. In March 1995, in conjunction with Eurostat, DG III therefore set up the Competitiveness project. The objective of the project is to develop a methodology with which to assess competitiveness and to build up a database containing the competitiveness indicators of the manufacturing industries of industrialised countries. The indicators fall into three categories: performance indicators, cost, price and design indicators and other indicators including those of infrastructure. The sources of the data are, on the one hand, the databases of Eurostat (DAISIE: data on activities and industrial structures in Europe, VISA: industrial indicators, LINDAREV: short-term indicators on European industry, SEC1 AND SEC2: national accounts and Volimex: external trade), DG IV (AMDATA: company mergers) the OECD (main scientific and technological indicators) and the United Nations (UNIDO: statistics on the

structure of industry) and, on the other, publications by Eurostat (Transport - annual statistics), DG XIII (European report on scientific and technological indicators), the OECD (Energy, Prices and Taxes; Network B: Labour force survey of the OECD and Revenue Statistics) and the IMF (International Financial Statistics). The indicators are entered in the COMPET database. For further information on Competitiveness, contact Berthold Feldmann: +352/43.01.34.401 or Anna Abatzoglou: +352/43.01.34.665.

**QUESTIONS WHICH UNIT D2 IS FREQUENTLY ASKED:**

Q] Why are the statistical data on the iron and steel industry more detailed than those on other industries?

The Treaty establishing the European Coal and Steel Community, which was signed in Paris on 18th April 1951, set up a common market for coal, iron and steel within its six original signatories. The Treaty established a High Authority to supervise its implementation, which was merged with the European Commission in 1967.

Article 46 of the original Treaty requires what is now the Commission to actively monitor the industry, and Article 47 allows the Commission to collect the information it needs directly from the industry. Over the years an extensive system of monthly, quarterly, annual and five yearly surveys have been developed with the help of the iron and steel industry.

Eurostat currently publishes "Iron and Steel Monthly" (with four quarterly supplements), "Iron and Steel Yearly Statistics" and "Steel consumption by user branch".

Q] What nomenclature(s) does Unit D2 use? Why? Do others exist? What are the main differences and similarities?

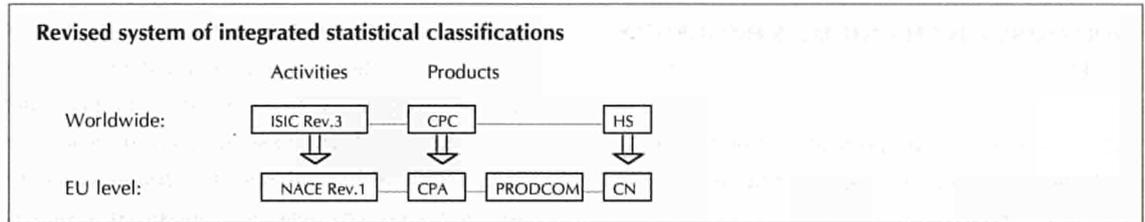
Before replying, it is useful to refer briefly to the theory. What statisticians call a nomenclature is a statistical classification. It is one of the basic tools for collecting statistical data and one of the factors which determine the quality of the statistical information. Industrial classifications can be divided into two main categories: classification by economic activity and classification by product. Classifications by activity were devised for categorising production units according to the activities carried on by them, with a view to the preparation of statistics of the phenomena relating to the

participation of such units in the economic process. Classifications by product are devised for categorising goods with a view to the preparation of statistics for observing such goods in their functional relationships with specific economic operations to which they have been subjected (production, foreign trade or transport). They may also be divided into two categories: classifications which take account of the industrial origin of the goods and those which take account of the material with which they are produced. Traditionally classifications of goods have always had greater importance than those of services.

The nomenclatures used by Unit D2 are NACE 1970, NACE Rev.1 and PRODCOM.

As its name indicates, NACE 1970 is the general industrial classification of economic activities within the European Communities which dates back to 1970. It is, therefore, a classification of activities and is mainly used for the transmission of statistics, since collection is carried out according to the classifications of the various Member States. The main objective of NACE 1970 was as far as possible to harmonise the data submitted by the Member States in order to achieve greater comparability. It is a classification which is structured hierarchically: the highest levels of the hierarchy are the most aggregated and the lowest levels the most detailed.

NACE Rev.1 is the first revision of the 1970 classification and is in the same position regarding harmonisation as NACE 1970. Economic activities develop in the course of time and it is therefore essential to revise the classification systems used so that they stay as close as possible to the economic reality. NACE Rev.1 uses for the first time an integrated approach to classifications of economic activities and products. It attempts to bring the classification systems more in line with each other by increasing harmonisation both at the level of the two types of classification and within the actual classification by product (harmonisation of product classifications relating to production



and those relating to external trade). It corresponds to the European version of the ISIC Rev.3 classification, but is more detailed than ISIC Rev.3 at 3 and 4 digit levels in order to correspond better to the structure of European enterprises. The work which Eurostat began in 1986 led to the Council Regulation of 9 October 1990, which laid down that both the collection and transmission of statistics on the economic activities of enterprises should be carried out using a single classification, i.e. NACE Rev.1, as of 1 January 1993. The Regulation also set up a NACE Committee (one of the main tasks of which is the interpretation of NACE Rev.1) and was included in the Treaty on the European Economic Area.

ISIC Rev.3 (International standard classification of all economic activities) is the classification of economic activities drawn up by the United Nations in 1989, use of which has been recommended world-wide. The first version of ISIC dates back to 1948 and the first two revisions took place in 1958 and 1968. The third revision is the first to use the integrated approach to the classifications of economic activities and products.

The harmonisation of product classifications in the context of the integrated system led to the creation in 1991 of the CPC (International Central Product Classification) at United Nations level and the CPA (Statistical Classification of Products by Activity in the European Economic Community) at EU level. The CPC introduced for the first time a system of international classification including both goods and services. One of the objectives of the CPC is to provide a classification system whose categories may be used for recording transactions at both national and international levels.

This involves extending the concept of the simple product to land, buildings or even intangible assets such as copyright. The CPA is a more detailed EU version of the CPC. Its structure is based on the criterion of economic origin and is based on the definition of economic activities given in NACE Rev.1.

PRODCOM is the new European system of production statistics for ores and goods (excluding, therefore, services). It dates back to December 1991 and the products on the PRODCOM list correspond exactly to those of the CPA for the six first digits. The products on the PRODCOM list in fact comprise eight digits: the headings of the products on the list were derived from those of the harmonised system (HS) and the Combined Nomenclature (CN). HS (Harmonised Commodity Description and Coding System) is a hierarchical system of product classification: its structure makes it possible to classify a product unambiguously under a heading in the system. It dates from 1983 and has played a decisive role in the revision of the international system of classifications. CN is the classification which has been used in the EU since 1988 for the purposes of external trade. Its most detailed level is larger than that of the HS. Products are identified by 8-digit codes and are revised annually.

Q] What databases are available to Unit D2 and what publications does it publish?

Before answering this question it is useful to present New Cronos. This is Eurostat's master database which centralises data from all the databases of the various Eurostat services. Having said that, it is important to draw a distinction between the databases used within the Eurostat services and those disseminated on New Cronos. The data contained in each of the new versions are exactly the same, but differences may exist regarding format, presentation or even denomination.

Unit D2 has created the following DATABASES:

Structure: DEBA (Data for European Business Analysis)/VISA - data and estimates on the European industries, not accessible on New Cronos.

DAISIE - data on activities and industrial structures in Europe; INDE on New Cronos.

SME - data on the activities and structures of small and medium-sized enterprises, SME on New Cronos.

Trends: LINDAREV - short-term indicators on European industry. LINDA on New Cronos.

Products: PRODCOM - production by product, not accessible on New Cronos.

Sectors: ACIER - statistics on the steel industry, soon accessible on New Cronos.

CHIMERE - statistics on the products of the chemicals, rubber and plastics sector and analyses based on these data, not accessible on New Cronos.

CHIMSTAT - sectoral statistics on the chemicals, rubber and plastics sector and analyses carried out on the basis of these data, not accessible on New Cronos.

COMPET - indicators on the competitiveness of European industries. COMPET on New Cronos.

The COMPUTERISED REFERENCE BASES compiled by Unit D2 are:

Structure: DOMINIQUE - methodologies of the surveys of the European industrial structures, not accessible on New Cronos.

Trends: MONA LISA - methodologies of surveys on European industrial trends, not accessible on New Cronos.

Products: PRODCOM - list of products with their definition using the CN code, not accessible on New Cronos.

Sectors: LEGICOM - European commercial legislation concerning the chemicals, rubber and plastics sector, not accessible on New Cronos.

LEGICHIM - European legislation other than commercial on the chemical, rubber and plastics sector, not accessible on New Cronos.

The PUBLICATIONS disseminated by Unit D2, containing the methodologies used by the Member States for surveys are:

Structure: "Structure and Activity of Industry, Annual inquiry - Main results", "Structure and Activity of Industry, Data by size of enterprise",

"Structure and Activity of Industry, Data by region", "Documentation on the Methodologies concerning industrial structural statistics of the Member States", "Enterprises in Europe", "The Globalisation Newsletter".

Trends: "Industrial trends, monthly statistics", "Statistics in focus".

Products: "PRODCOM List".

Sectors: "Iron and Steel, Monthly", "Iron and Steel, Yearly Statistics", "Steel consumption by user branch", "Panorama of EU Industry" (in conjunction with DG III), "Panorama of EU Industry, short-term supplement".

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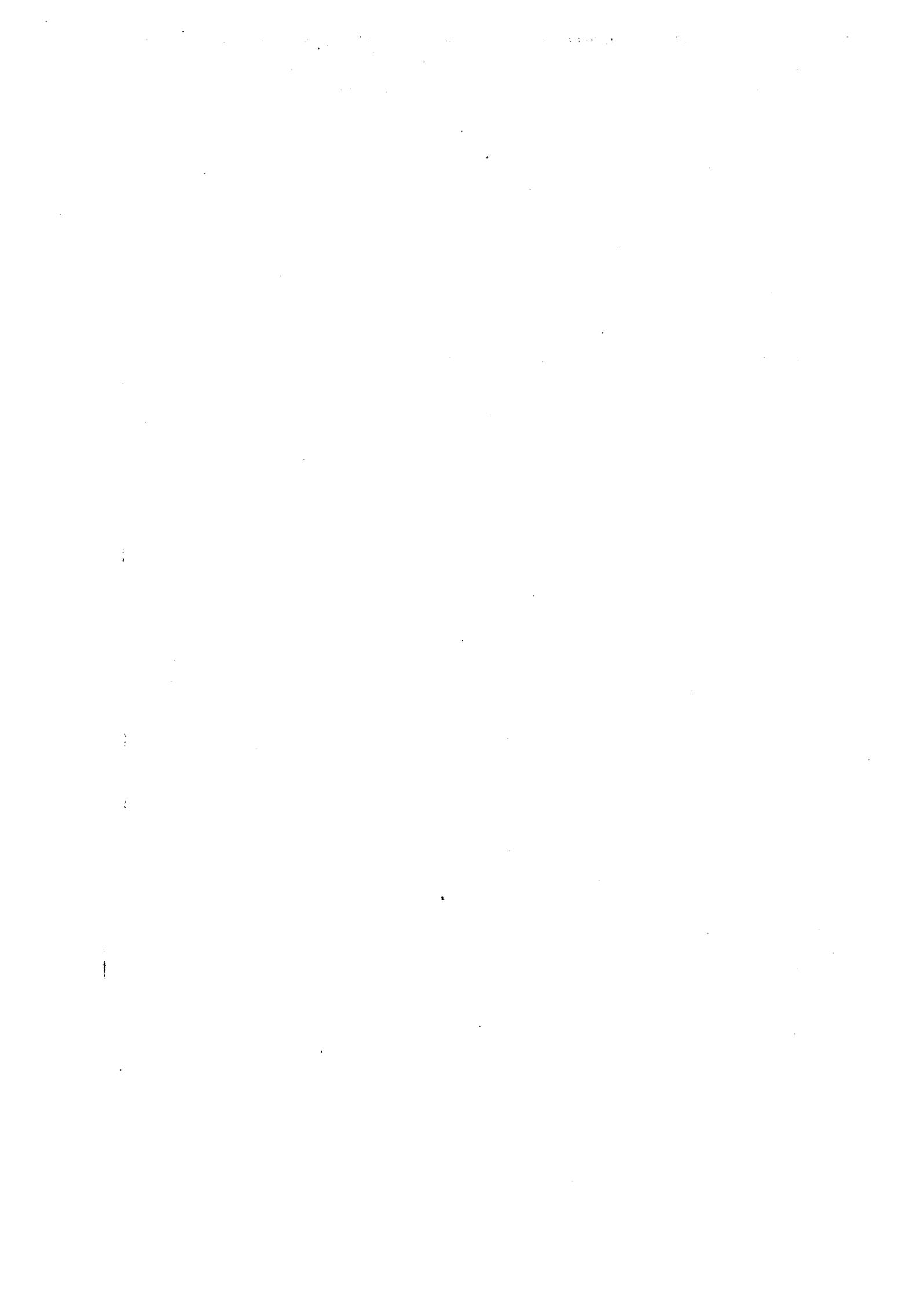
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