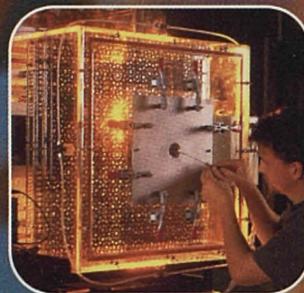


Monthly

Panorama

of European Industry



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DE EUROPÆISKE FÆLLESSKABERS STATISTISKE KONTOR
STATISTISCHES AMT DER EUROPÄISCHEN GEMEINSCHAFTEN
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Monthly

Panorama

of European Industry

ISSUE 6/98 ■ JUNE 1998

Theme
Energy and industry
Series
Short-term statistics

4

B

Sent to press in June 1998

A great deal of additional information on the European Union is available on the Internet. It can be accessed through the Europa server (<http://europa.eu.int>)

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The European industrial economy was continuing to grow as data for the first quarter of 1998 was released. Compared to March 1997, EU-15 production volume increased by 5.8%. When looking at the more recent trend of the first quarter of 1998 compared to the last quarter of 1997, EU-15 production rose by 1.4% (this figure is not annualised). Producer prices continued to expand at a moderate pace, rising by 0.5% in the twelve months to April 1998.

The second half of this publication has two special features: firstly, an article on the instrument engineering industry; secondly, an article on Structural Funds and employment trends in manufacturing industries.

Instrument engineering accounted for just under 2% of total EU manufacturing production in 1996. More recent trends show that the industry has been expanding at a rate of 3.5% for the first quarter of 1998 (compared to the last quarter of 1997). The industry is particularly characterised by niche manufacturers.

One study which has touched on the role of small and medium sized enterprises in the European economy may be found as the final article of this month's issue. The study contains data for six of the Member States and the effects (mainly relating to employment) of the Structural Funds programmes during the period 1989 to 1993. The article focuses on Objective 5b of the programme, which is aimed at the development of rural areas.

Pedro Díaz Muñoz,
Luxembourg



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Special focus - a feature on manufacturing employment in Objective 5b areas, page 77

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The Monthly Panorama of European Industry has the objective of furnishing readers with an instrument which will allow them to follow the evolution of industrial short-term trends and also show the structure and activity of an industry. The publication appears eleven times during the course of the year. When the occasion warrants topical articles may well be treated in the form of a special edition, up to six of which are planned for 1998.

This publication is a joint project of Eurostat and Directorate General III (Industry policy).

The opinions expressed in this publication are those of the individual authors alone and do not necessarily reflect the position of the European Commission.

Next issue:

Textiles, wearing apparel and leather

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Data extracted on 11-06-98

1.

Total industry

Commentary 8
current situation in the EU, Japan and United States

Data in this section 9
index of production
producer price index
new orders
trade balance



1. Total industry

Moderate industrial production growth across Europe

All growth rates in this commentary are for a three-month moving average compared to the previous three months unless otherwise stated. The data quoted has been treated for seasonal fluctuations and one-off effects (these series are termed the trend-cycle).

Production in the European Union rose by 1.4% in the three months to March 1998 (compared to the previous three months). The corresponding figures for January and February 1998 were 1.2%. Corresponding data for EUR11 showed that production volume index also expanded by 1.4% in the three months to March 1998. Data for both the European Union, and the EUR11 zone, showed that rates of growth were back to the rates seen in the summer of 1997 (when EU industrial production increased by 1.3% and EUR11 output went up by 1.7%).

Performance in the Member States

Turning to the individual performance of the Member States: the highest rates of growth for March 1998 were found in Scandinavian countries. Finland saw industrial production grow by 2.2% in the three months to March 1998. Other Scandinavian countries also recorded growth rates above those of the European average, with respective growth rates of 1.4% in Denmark and 1.6% in Sweden (for February 1998). Spain and France saw production increase by 1.4%.

In Germany the latest growth rate available (April 1998) was equal to 1.8%, above the European average. This meant that for fifteenth consecutive month the German rate of growth for total industrial production was maintained between the rates of 1.0% and 2.0%.

The Italian and United Kingdom economies were not performing at such high rates of expansion. In Italy, the latest figure recorded was equal to only 0.3% growth. Hence, the tendency of the production index to slow in Italy continued its recent trend. From May 1997 through to March 1998, the industrial production index in Italy has fallen or remained unchanged in every month.



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Industrial production and producer prices

EU production is led by capital goods, up 2.4% in the three-month period ending in March 1998 (compared to the previous three months)

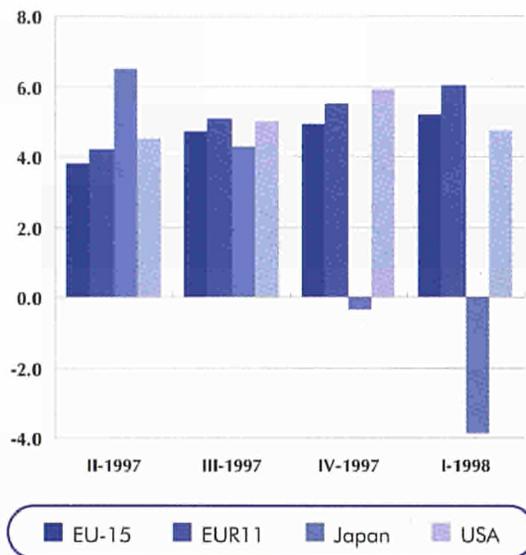


Figure 1.1

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

Source: eurostat

In the United Kingdom, the rate of change for total industrial production was also moderate. The latest data for March 1998 showed an increase of 0.3%. This marked the thirteenth consecutive month of growth less than 0.5% for the United Kingdom production index. Furthermore, the moderate tendency of the production index gave support to the GDP figures (for the first quarter of 1998) released in the third week of May, that suggested a slow down had begun in the United Kingdom economy.

Capital goods has the highest rate of growth

When looking at data for the particular goods sectors we can see the following growth rates for the European economy: capital goods increased by 2.4% in March 1998, intermediate goods by 1.2%, consumer durables by 0.9% and consumer non-durables by 0.3%.

In France there have now been four successive months when the production index has fallen by 0.1 percentage points, from a high of 1.8% in November 1997 down to the latest figure of 1.4% in March 1998.

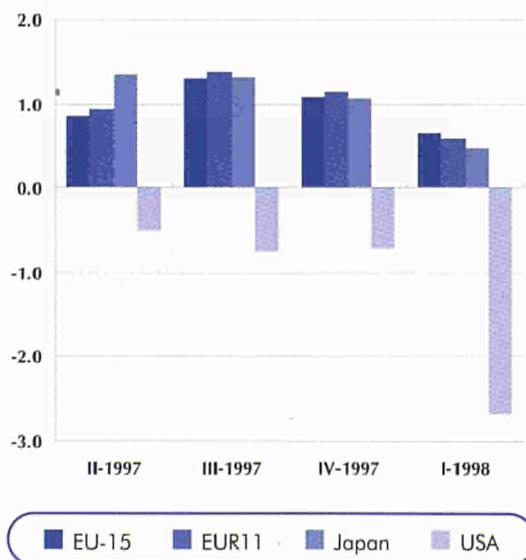


Figure 1.2

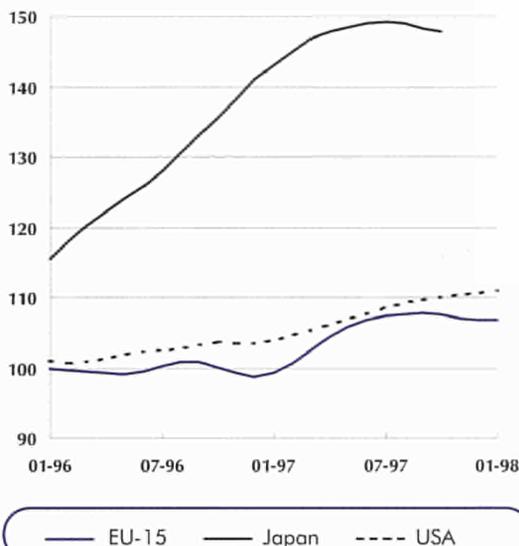
Producer prices: growth rate, year on year (%)

Source: eurostat

Spanish rates of growth were not as high as during the summer of 1997 (when they were consistently over the two per cent level). Nevertheless, data for the last two months has shown production still expanding at a fairly rapid rate, up by 1.2% in February 1998 and 1.4% in March 1998.

Figure 1.3

New orders index (1995 = 100)



Source: eurostat

Whilst the performance of the consumer durables goods sector has improved from a growth rate of 0.1% in November 1997, rising to the latest figure of 0.9% (in March 1998), the capital goods sector has seen growth rise over the same period from 0.9% to 2.4%. However, in the consumer non-durables sector the opposite trend was seen, with growth rates moving from 0.6% to -0.3% over the same period (November 1997 to March 1998). For intermediate goods there was also a moderate expansion of the sector, from 1.1% in November 1997 to 1.2% by March 1998.

Producer price growth

equal to 0.5% in April 1998

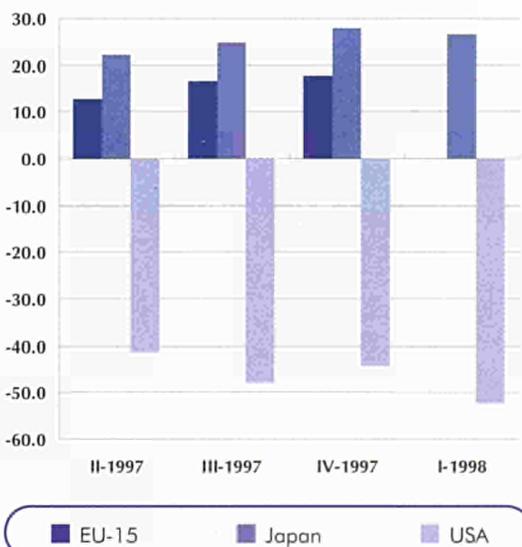
For the individual Member States, the highest rates of growth in the intermediate goods sector were in Belgium and Germany (1.5%), France (1.6%) and Finland (1.9%). Finland also recorded high growth rates for capital goods (up by 4.5%), followed by Germany (3.1%, April) and Spain (2.9%). In the consumer durables sector, Denmark (3.7%), France (3.1%) and Spain (3.0%) all recorded rapid expansion, whilst in the consumer non-durables sector, rates of growth were considerably lower across all countries, the highest growth rate of any of the Member States being 2.0% in Greece.

Industrial production in Japan and the United States

The American economy seems to be moving into a period where growth is not as pronounced as in recent months, whilst in Japan the industrial economy continues to record negative growth rates.

Figure 1.4

Quarterly trade balance - manufactured goods (billion ECU)



Source: eurostat

The Japanese rate of change was equal to -1.8% during the three months to March 1998. This figure could be compared to the reductions of 2.1% in January and 2.0% in February 1998. Hence, for the seventh consecutive month, Japan recorded negative rates of change in industrial production.

In the United States, growth rates were somewhat reduced in recent months. United States industrial production declined from a high point of 1.5% in November 1997 through to 0.5% by March 1998. Nevertheless, the United States has recorded positive growth in its industrial economy in every month since January 1996.

Industrial production (working day adjusted) & trade balance

Producer price data

Producer prices continued to expand in Europe at moderate rates of growth. Data for April 1998 showed that the change compared to a year before was equal to 0.5%. The growth rate for EUR11 was equal to 0.3%. Since the turn of the year, European producer prices have been at lower rates than corresponding figures for the end of 1997, when producer price growth was over the one per cent level.

Producer price growth was negative in the intermediate goods sector, down by 0.6% compared to a year before in April 1998. Corresponding growth rates for capital goods and consumer durables were 0.9% and 0.5% respectively. However, despite the fact that production growth was depressed in the consumer non-durables sector of the economy, there was nevertheless domestic producer price growth of 1.6%, the highest of the four goods sectors in Europe.

Turning to the individual Member States, price growth was subdued across many of the Member States. The largest European economies recorded the following growth rates in April 1998: Germany (0.3%), France (-0.7%), Italy (0.9%), the United Kingdom (1.1%, May) and Spain (0.1%).

American producer prices fell by 2.2% to March 1998, the twelfth consecutive fall in prices for the US industrial economy. In Japan, prices rose to a small extent, up by 0.1%. They hence continued the trend of recent months (declining from a high of 1.4% in September 1997) to the March rate.

This text was written by: Andrew Redpath

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EU-15 EUR11 Japan USA

	EU-15	EUR11	Japan	USA
04-97	5.3	5.7	4.8	5.5
05-97	2.2	2.7	7.7	4.3
06-97	3.8	4.2	7.0	3.8
07-97	5.7	6.2	4.9	5.1
08-97	4.3	4.8	4.8	5.0
09-97	4.1	4.2	3.3	4.8
10-97	5.5	6.0	1.6	5.8
11-97	4.4	5.1	-0.7	5.9
12-97	4.8	5.4	-2.0	6.0
01-98	4.7	5.7	-2.5	5.0
02-98	5.0	5.8	-3.6	4.5
03-98	5.8	6.5	-5.3	4.8

Table 1.1

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

Source:  eurostat

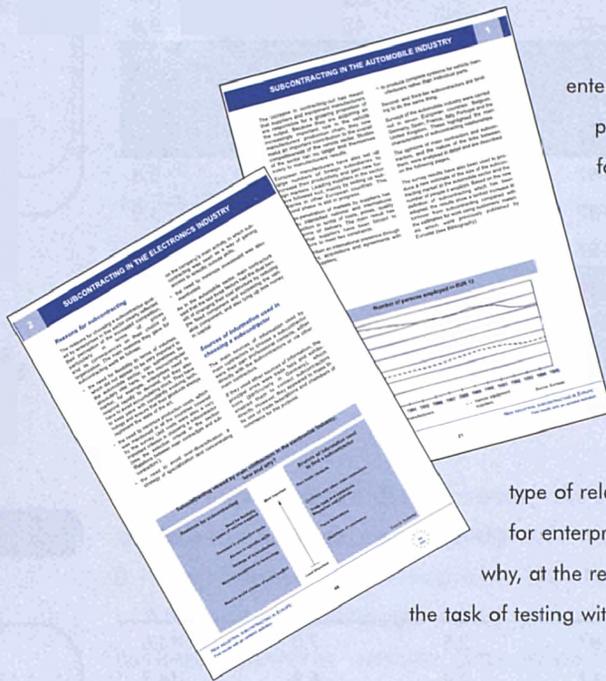
EU-15 Japan USA

	EU-15	Japan	USA
04-97	2.8	7.0	-13.6
05-97	4.4	6.8	-14.3
06-97	5.6	8.4	-13.4
07-97	9.9	8.3	-15.3
08-97	3.3	7.1	-15.5
09-97	3.4	9.6	-16.9
10-97	6.7	9.4	-14.7
11-97	4.4	8.7	-13.8
12-97	6.7	9.8	-15.9
01-98	-4.5	3.8	-16.8
02-98	-5.7	12.2	-17.0
03-98	:	10.7	-18.6

Table 1.2

Monthly trade
balance -
manufactured goods
(billion ECU)

Source:  eurostat



New industrial sub-contracting in Europe

Within a context of increased international competition, European enterprises have been forced to restructure and to outsource a number of production functions. Recourse to subcontracting constitutes one of the forms of this outsourcing. However, subcontracting itself is evolving: in most cases, it is not restricted to the simple processing of materials supplied by a main contractor. Subcontractors are increasingly responsible for key operations in the production process (purchase of raw materials, design of products, investment, etc).

The nature of the interdependence between subcontractors and main contractors is therefore changing, and is bringing about a new type of relationship which must be taken into account in the policies carried out for enterprises. Information about enterprises must adapt to this change. This is why, at the request of the European Commission's DG XXIII, Eurostat has taken on the task of testing within volunteer Member States a new concept of subcontracting and of evaluating its importance and characteristics.

New industrial subcontracting in Europe presents the results of Eurostat's pilot statistical exercise in which four sectors were the subject of surveys or studies:

- ★ the automobile sector;
- ★ electronics;
- ★ textiles/clothing;
- ★ aeronautics.

For each sector, a study was made of the importance of subcontracting within the purchases of main contractors, the importance of subcontracting sales within the subcontractors' turnover figures, the geographical extent of subcontracting transactions, and finally the main characteristics of the links established between main contractors and subcontractors (existence of contracts, supply of materials, cooperation in research and development, etc).

The measurements that were carried out within this pilot exercise, using harmonised methodology and concepts, contribute today to a better understanding of the organisation of industrial relationships which underpin four essential sectors of the European economy.

The publication is available in French and English.
 Catalogue number in French, CA-01-96-139-FR-C; in English, CA-01-96-139-EN-C.

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2.

Latest outlook

Business cycle at a glance 14

Short-term indicators 15

production index

expected output index

producer price index

employment index

the construction sector

capacity utilisation

foreign trade indices

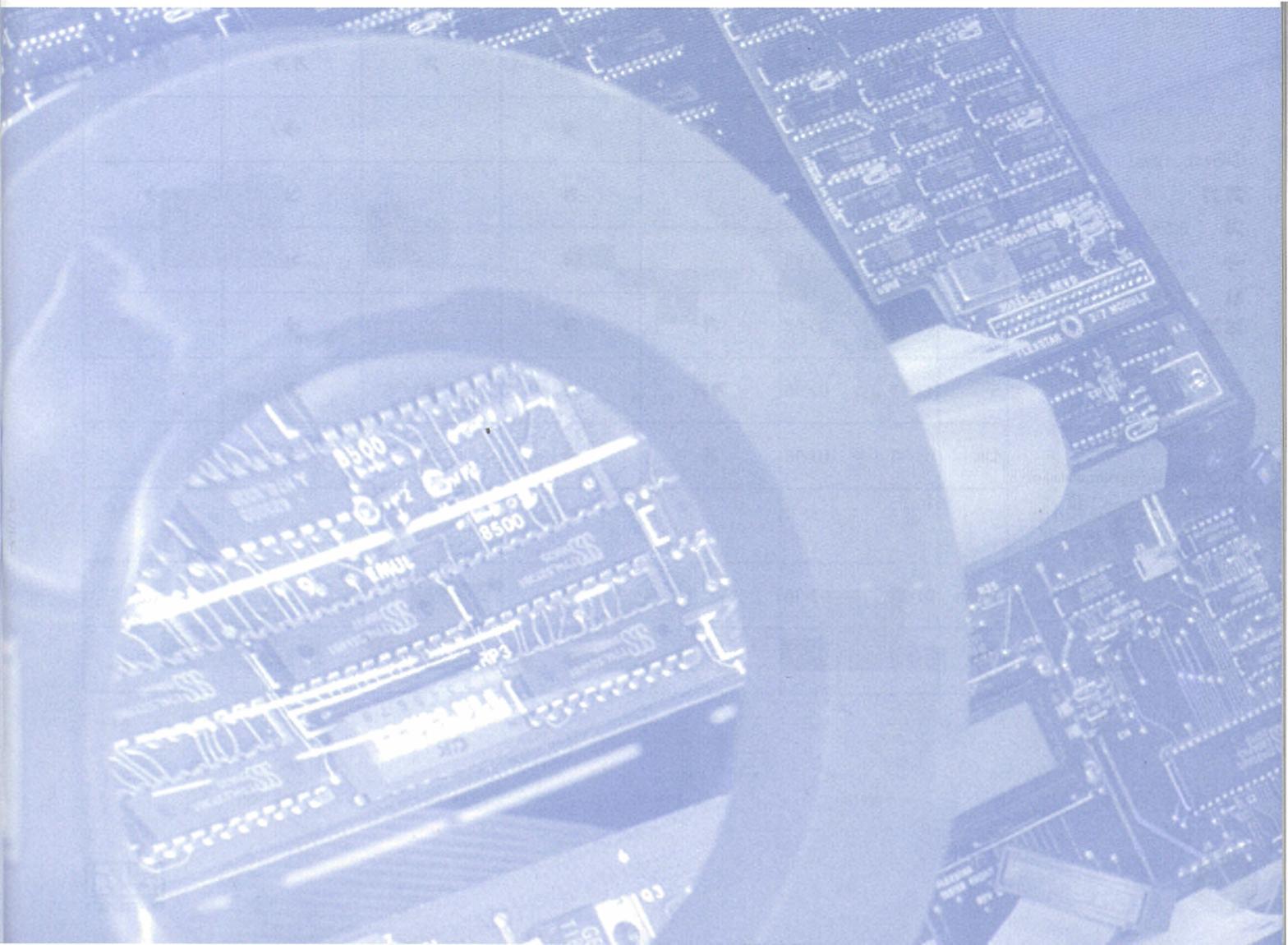


Table 2.1

Business cycle at a glance: growth rate, three months compared to the previous three months (%)

	Latest 3 months available	Estimated output index (1)	Production	Producer prices	Capacity utilisation (2)	New orders
EU-15	01-98 ⇄ 03-98	↗	↗	→	→	:
B	01-98 ⇄ 03-98	:	→	:	↘	:
DK	01-98 ⇄ 03-98	:	↗	↘	↗	↗
D	02-98 ⇄ 04-98	↗	↗	→	↗	↗↗
EL	01-98 ⇄ 03-98	:	↗	→	↗	:
E	01-98 ⇄ 03-98	↗	↗	↘	↘	:
F	01-98 ⇄ 03-98	:	↗	↘	↘	:
IRL	08-97 ⇄ 10-97	↗↗	↗↗	→	↗	:
I	01-98 ⇄ 03-98	↗	→	→	↗	:
L	01-98 ⇄ 03-98	:	↗	↗	↗↗	↗↗
NL	01-98 ⇄ 03-98	↗	→	:	→	:
A	12-97 ⇄ 02-98	:	↗	:	↘	→
P	01-98 ⇄ 03-98	:	↗	:	↘	:
FIN	01-98 ⇄ 03-98	↗	↗	:	→	:
S	12-97 ⇄ 02-98	↗↗	↗	→	↗	:
UK	01-98 ⇄ 03-98	↗	→	↗	→	:
Japan	01-98 ⇄ 03-98	:	↘	→	:	:
USA	01-98 ⇄ 03-98	:	→	↘	:	:

Growth rates:

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

1) EOI runs two months ahead of the period given

2) capacity utilisation is fixed on the first month of the quarter of the period given

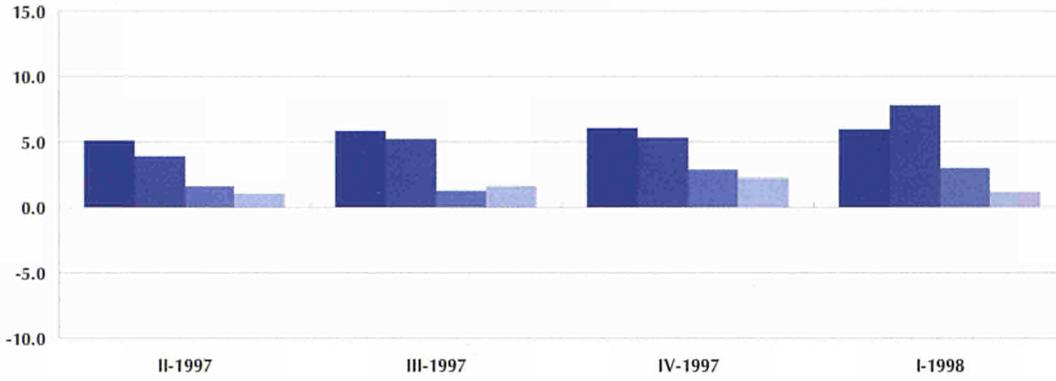
Source:  eurostat

Production index (working day adjusted)

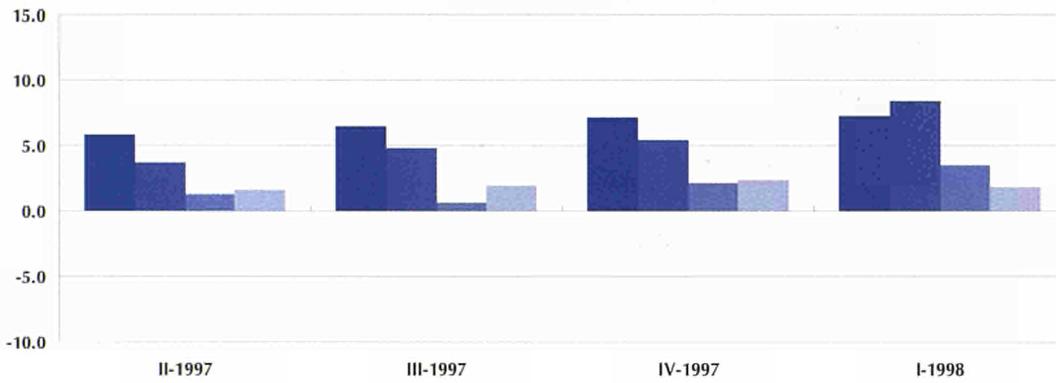
Figure 2.1

Industrial production for the main industrial groupings: growth rate, year on year (%)

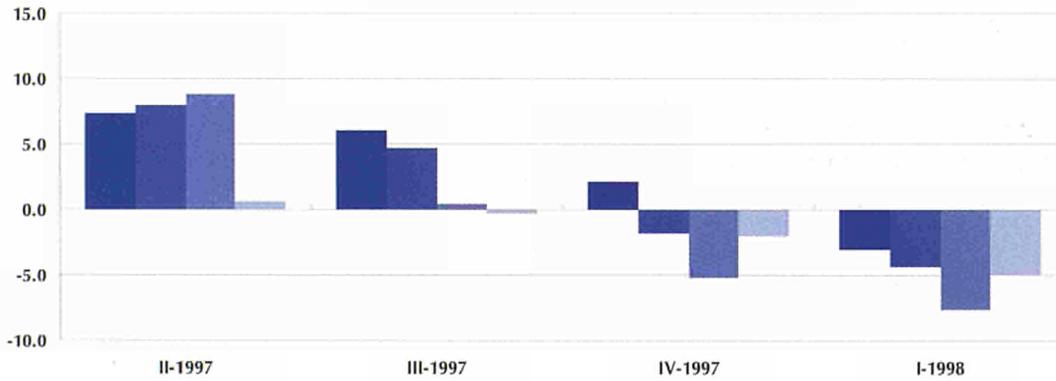
EU-15



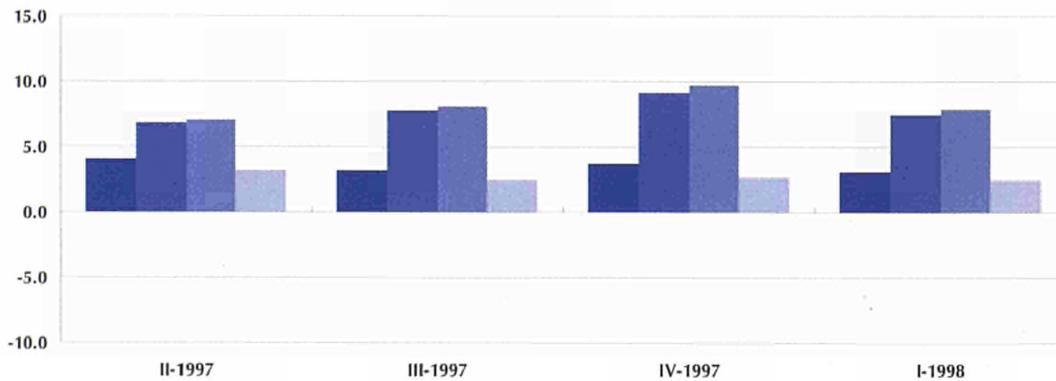
EUR11



Japan



USA



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

Source:  eurostat

Production index (seasonally adjusted)

Table 2.2

Industrial production:
indices
(1995 = 100)

	1995	1996	1997	11-97	12-97	01-98	02-98	03-98	04-98
EU-15	100.0	100.1	103.9	105.9	106.0	106.4	107.3	108.1	:
B	100.0	101.1	105.6	106.2	111.2	107.9	108.3	104.9	:
DK	100.0	101.1	105.6	108.6	109.2	110.1	109.8	109.7	:
D	100.0	100.2	104.1	106.6	106.3	107.3	109.1	112.4	108.4
EL	100.0	101.0	102.7	102.5	102.7	104.9	106.8	107.5	:
E	100.0	99.0	105.9	108.6	109.1	108.9	112.5	110.2	:
F	100.0	99.9	103.8	105.5	107.4	106.8	107.7	109.6	:
IRL	100.0	108.0	:	:	:	:	:	:	:
I	100.0	97.2	99.8	101.0	102.3	101.6	100.8	101.5	:
L	100.0	99.6	106.3	110.6	112.4	113.0	110.0	111.1	:
NL	100.0	102.7	104.7	107.7	104.8	104.1	104.6	104.9	:
A	100.0	100.6	106.7	110.0	114.4	109.1	109.2	:	:
P	100.0	101.3	103.9	107.4	104.2	105.8	108.2	109.5	:
FIN	100.0	103.4	112.6	117.2	120.7	117.6	118.2	119.9	:
S	100.0	103.1	111.2	117.3	117.5	111.9	114.1	:	:
UK	100.0	100.9	102.3	102.3	102.4	102.2	101.9	102.6	:
Japan	100.0	102.4	106.8	102.8	104.1	107.1	102.9	100.8	:
USA	100.0	103.5	108.6	111.3	111.7	111.5	111.2	111.5	:

Source:  eurostat

Table 2.3

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

	1995	1996	1997	10-97	11-97	12-97	01-98	02-98	03-98
Total industry									
EU-15	100.0	100.1	103.9	105.6	105.9	106.0	106.4	107.3	108.1
Japan	100.0	102.4	106.8	108.0	102.8	104.1	107.1	102.9	100.8
USA	100.0	103.5	108.6	110.5	111.3	111.7	111.5	111.2	111.5
Intermediate goods									
EU-15	100.0	99.1	104.0	106.4	106.0	106.5	106.8	107.4	108.1
Japan	100.0	100.1	105.4	107.0	102.8	103.6	105.6	101.7	99.6
USA	100.0	102.4	106.3	107.4	108.3	108.4	108.1	108.6	108.5
Capital goods									
EU-15	100.0	102.0	106.0	108.1	108.6	107.7	109.1	110.7	113.3
Japan	100.0	109.1	115.0	115.3	110.5	109.9	114.2	111.2	108.2
USA	100.0	105.2	113.2	115.4	116.7	117.3	117.1	117.1	117.0
Consumer durables									
EU-15	100.0	100.2	102.1	102.9	103.9	101.8	103.1	106.0	103.4
Japan	100.0	97.9	100.7	101.6	91.0	96.1	100.4	95.3	93.0
USA	100.0	106.2	114.8	117.4	119.1	119.8	119.5	119.5	119.4
Consumer non-durables									
EU-15	100.0	99.0	100.8	101.7	101.0	101.8	101.7	101.6	101.8
Japan	100.0	99.6	99.6	102.5	95.6	98.5	99.7	94.3	94.3
USA	100.0	100.6	103.5	104.4	104.9	105.2	105.5	105.1	104.8

Source:  eurostat

Production index (trend cycle)

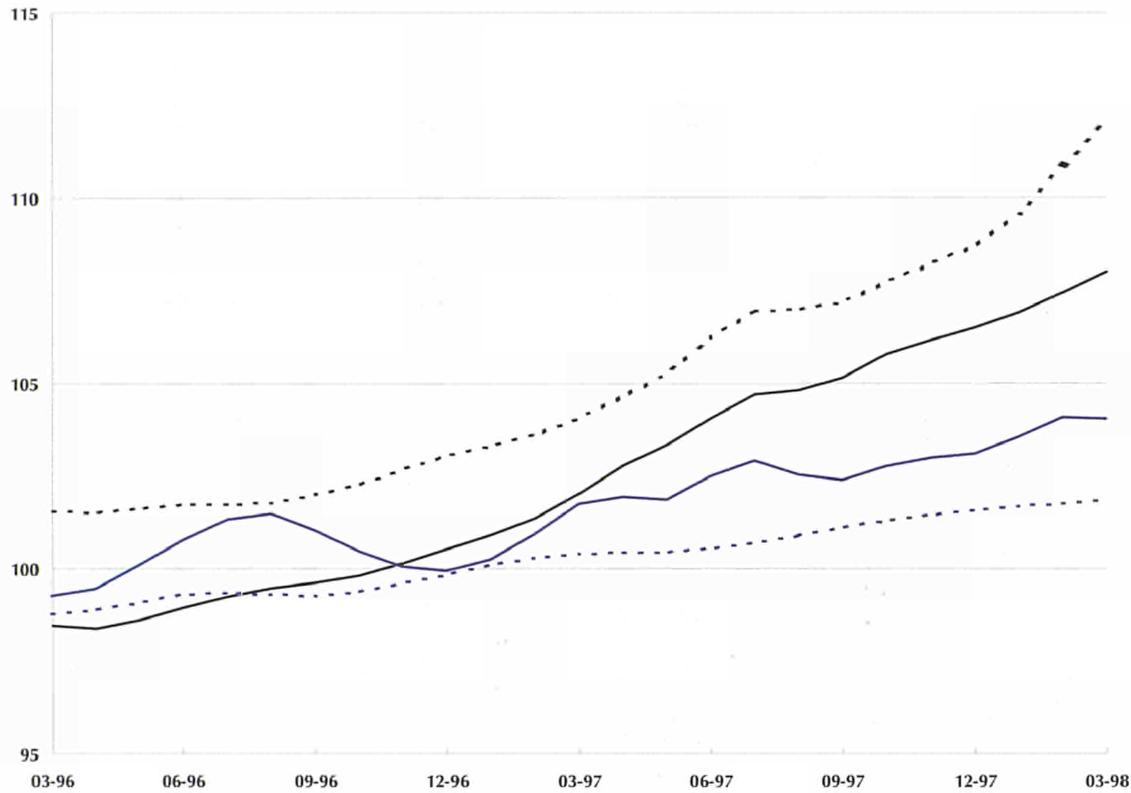


Figure 2.2

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

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

Source: eurostat

	Latest 3 months available	Total industry	Intermediate goods	Capital goods	Consumer durables	Consumer non-durables
EU-15	01-98 ⇨ 03-98	1.4	1.2	2.4	0.9	0.3
B	01-98 ⇨ 03-98	0.4	1.5	0.4	-1.4	0.3
DK	01-98 ⇨ 03-98	1.4	1.7	0.5	3.7	1.1
D	02-98 ⇨ 04-98	1.8	1.5	3.1	0.9	1.2
EL	01-98 ⇨ 03-98	1.5	1.2	1.0	1.8	2.0
E	01-98 ⇨ 03-98	1.4	0.4	2.9	3.0	1.0
F	01-98 ⇨ 03-98	1.4	1.6	2.4	3.1	0.4
IRL	08-97 ⇨ 10-97	4.4	6.1	5.2	:	1.3
I	01-98 ⇨ 03-98	0.3	0.8	0.0	-1.4	-0.6
L	01-98 ⇨ 03-98	0.9	1.1	2.5	3.3	0.3
NL	01-98 ⇨ 03-98	-0.1	-0.9	0.4	1.5	0.4
A	12-97 ⇨ 02-98	1.5	:	3.6	4.6	0.2
P	01-98 ⇨ 03-98	1.3	1.3	3.6	4.9	-0.6
FIN	01-98 ⇨ 03-98	2.2	1.9	4.5	2.2	0.2
S	12-97 ⇨ 02-98	1.6	1.3	0.5	1.8	0.1
UK	01-98 ⇨ 03-98	0.3	0.2	1.7	-2.0	-0.9
Japan	01-98 ⇨ 03-98	-1.8	-2.8	-1.3	-1.2	-1.2
USA	01-98 ⇨ 03-98	0.5	0.5	1.0	1.1	0.5

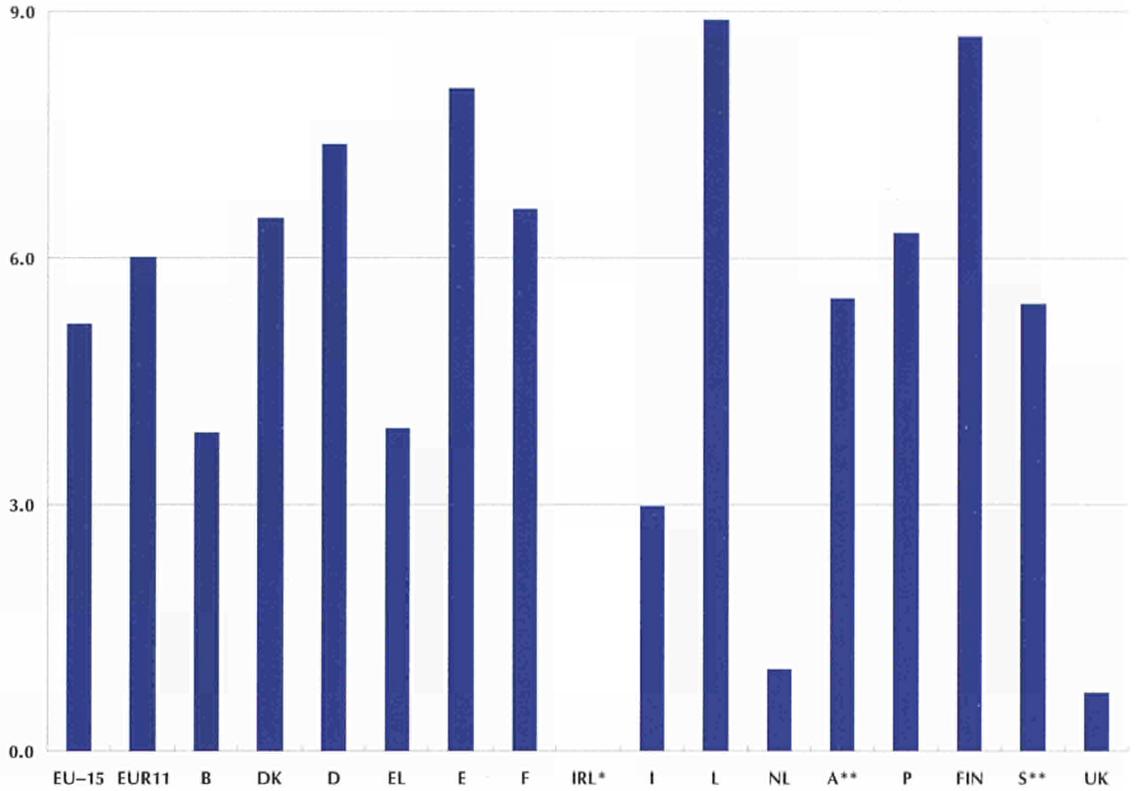
Table 2.4

Industrial production for the main industrial groupings: growth rate, three months compared to the previous three months (%)

Source: eurostat

Figure 2.3

Industrial production for total industry: growth rate, three months compared to the same three months of the previous year, 01-98 to 03-98 (%)



Source: eurostat

Table 2.5

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

	Latest 3 months available			Total industry	Intermediate goods	Capital goods	Consumer durables	Consumer non-durables
EU-15	01-98	⇔	03-98	5.2	6.0	7.8	3.0	1.2
B	01-98	⇔	03-98	3.9	7.0	0.3	1.5	2.2
DK	01-98	⇔	03-98	6.5	6.4	4.7	16.5	6.0
D	02-98	⇔	04-98	7.1	7.4	11.7	2.9	2.5
EL	01-98	⇔	03-98	3.9	2.8	5.3	1.7	6.2
E	01-98	⇔	03-98	8.1	6.6	13.5	15.0	4.6
F	01-98	⇔	03-98	6.6	6.1	10.0	12.7	3.7
IRL	08-97	⇔	10-97	20.8	35.8	23.4	:	4.9
I	01-98	⇔	03-98	3.0	5.9	-0.8	-6.0	-0.8
L	01-98	⇔	03-98	8.9	10.7	15.9	14.2	5.3
NL	01-98	⇔	03-98	1.0	0.2	1.4	6.9	1.9
A	12-97	⇔	02-98	7.5	:	10.4	12.7	1.2
P	01-98	⇔	03-98	6.3	7.0	10.7	22.2	-1.3
FIN	01-98	⇔	03-98	8.7	9.4	15.1	11.4	1.5
S	12-97	⇔	02-98	5.7	6.2	7.2	8.1	-0.1
UK	01-98	⇔	03-98	0.7	0.6	4.6	-3.1	-2.5
Japan	01-98	⇔	03-98	-3.9	-3.1	-4.4	-7.7	-5.0
USA	01-98	⇔	03-98	4.8	3.0	7.4	7.9	2.4

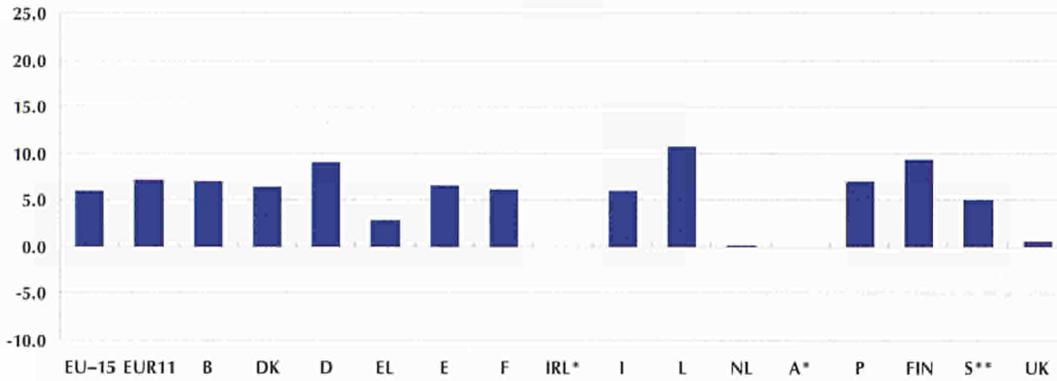
Source: eurostat

Production index (working day adjusted)

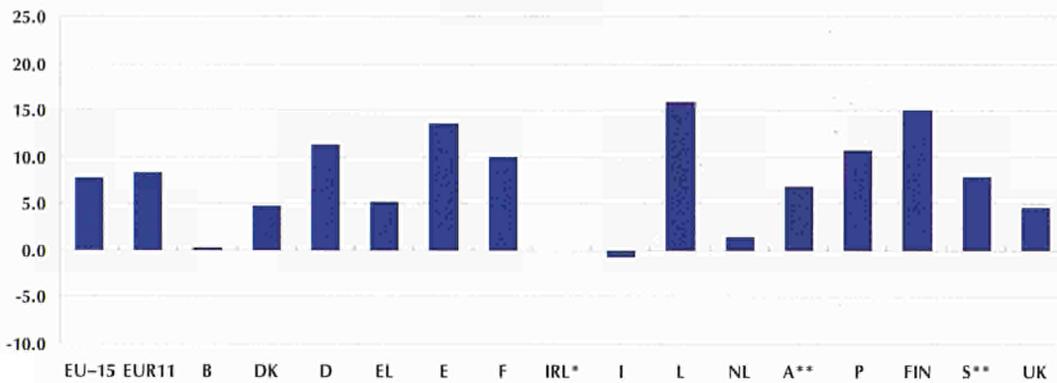
Figure 2.4

Industrial production for the main industrial groupings: growth rate, three months compared to the same three months of the previous year, 01-98 to 03-98 (%)

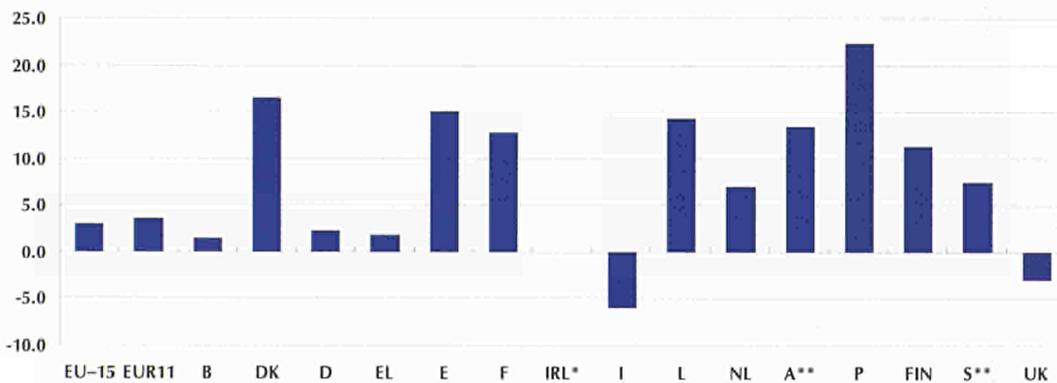
Intermediate goods



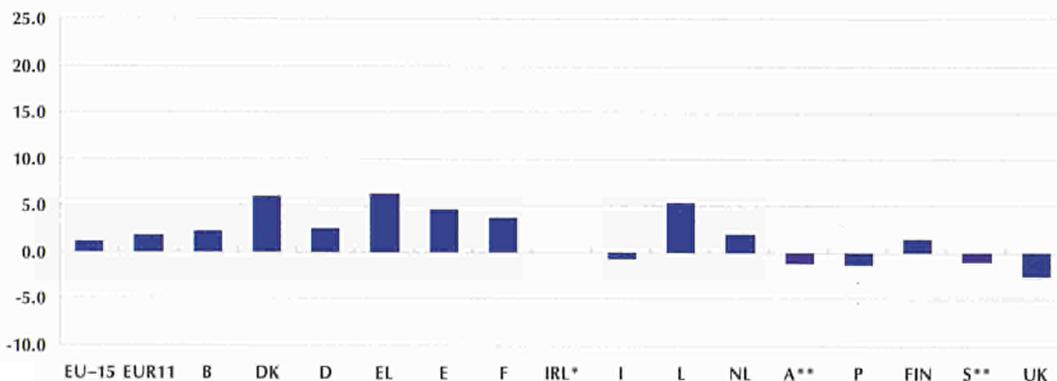
Capital goods



Consumer durables goods



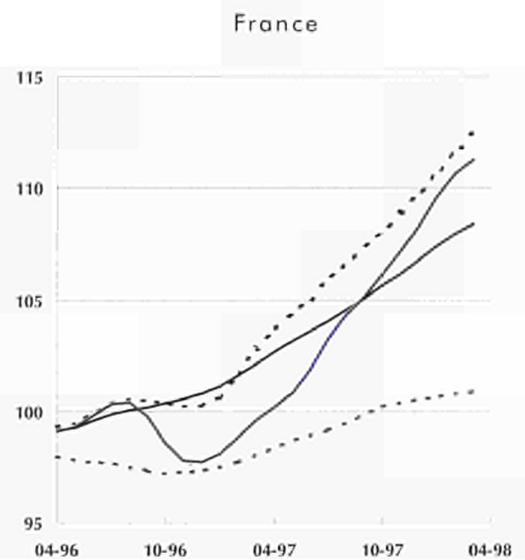
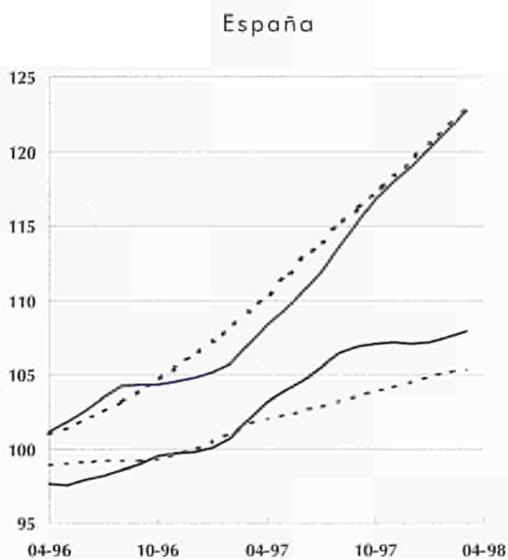
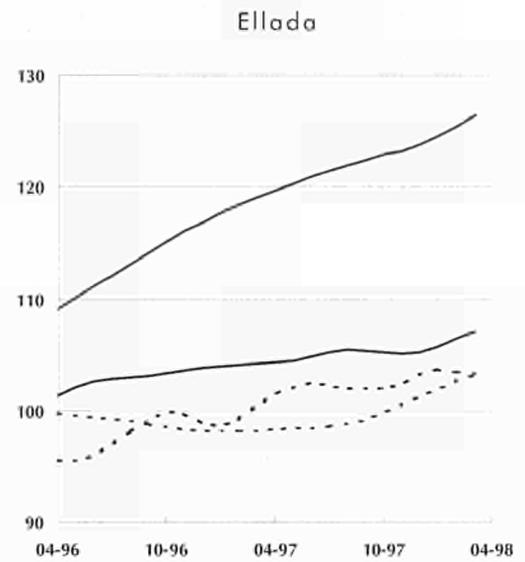
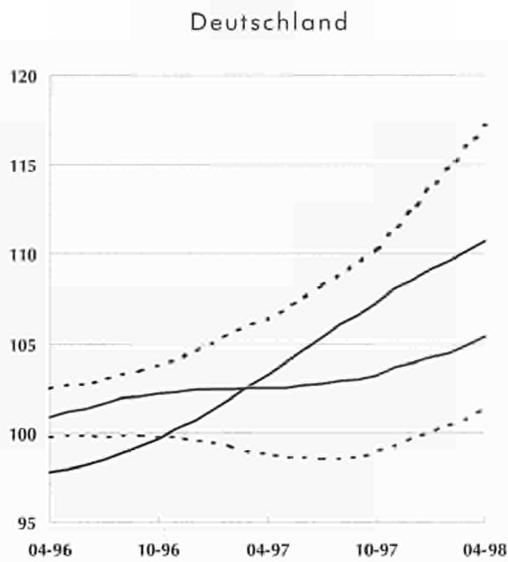
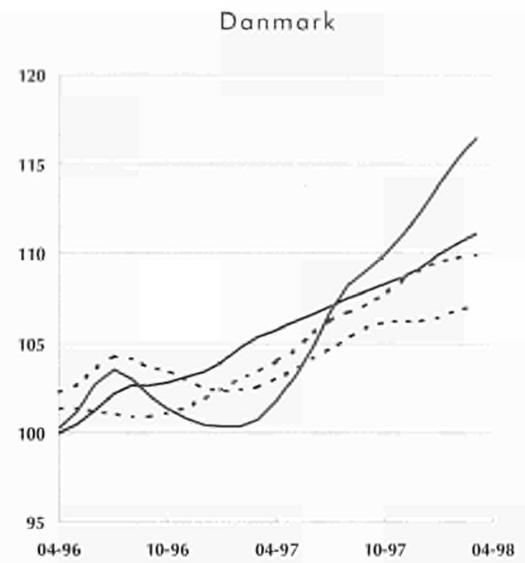
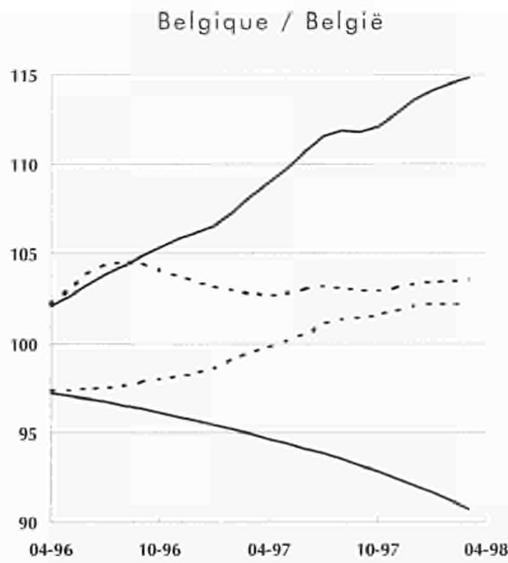
Consumer non-durables goods



Source: eurostat

Figure 2.5

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



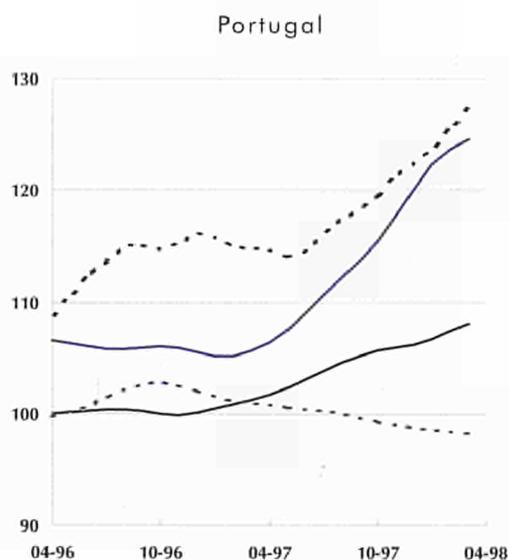
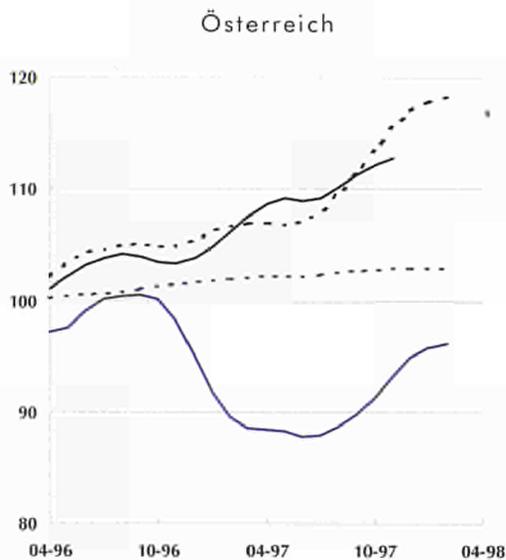
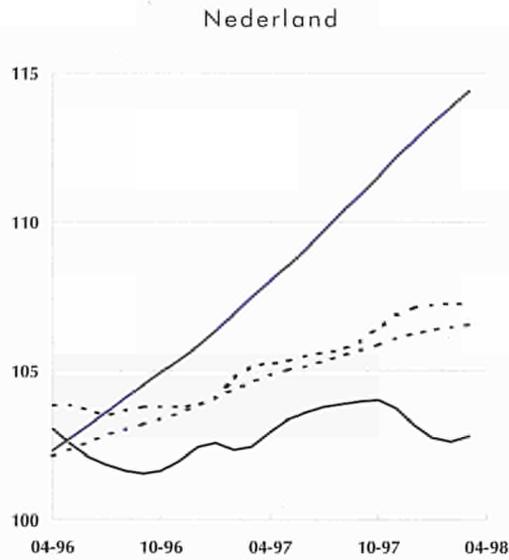
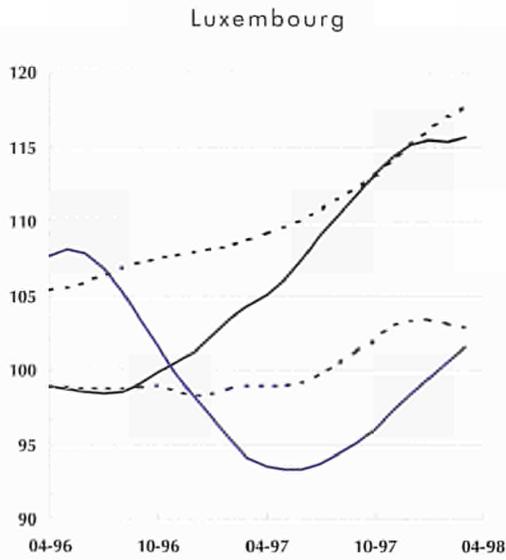
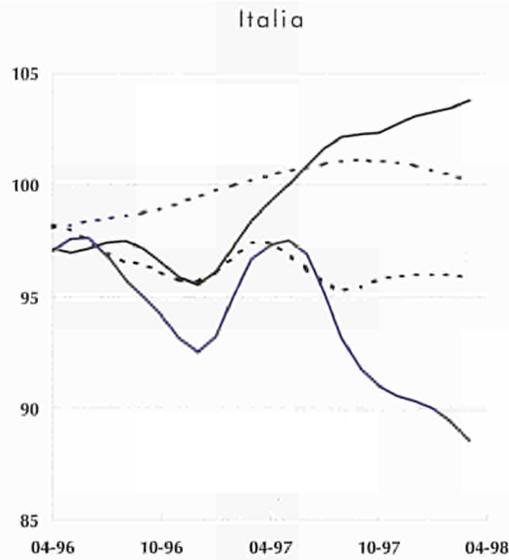
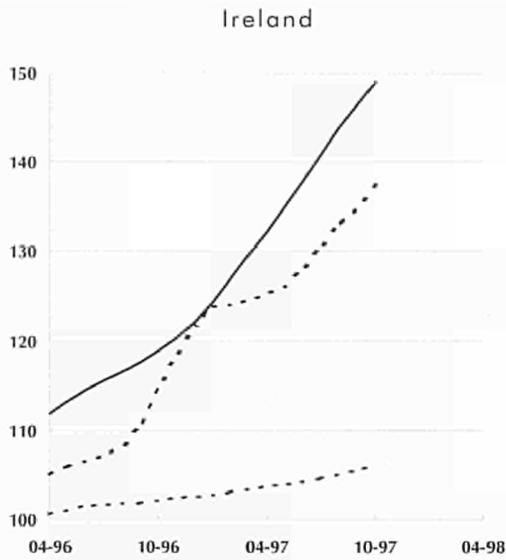
Intermediate goods ———
 Capital goods - - - -
 Consumer durables ———
 Consumer non-durables - - - -

Source: eurostat

Production index (trend cycle)

Figure 2.5

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

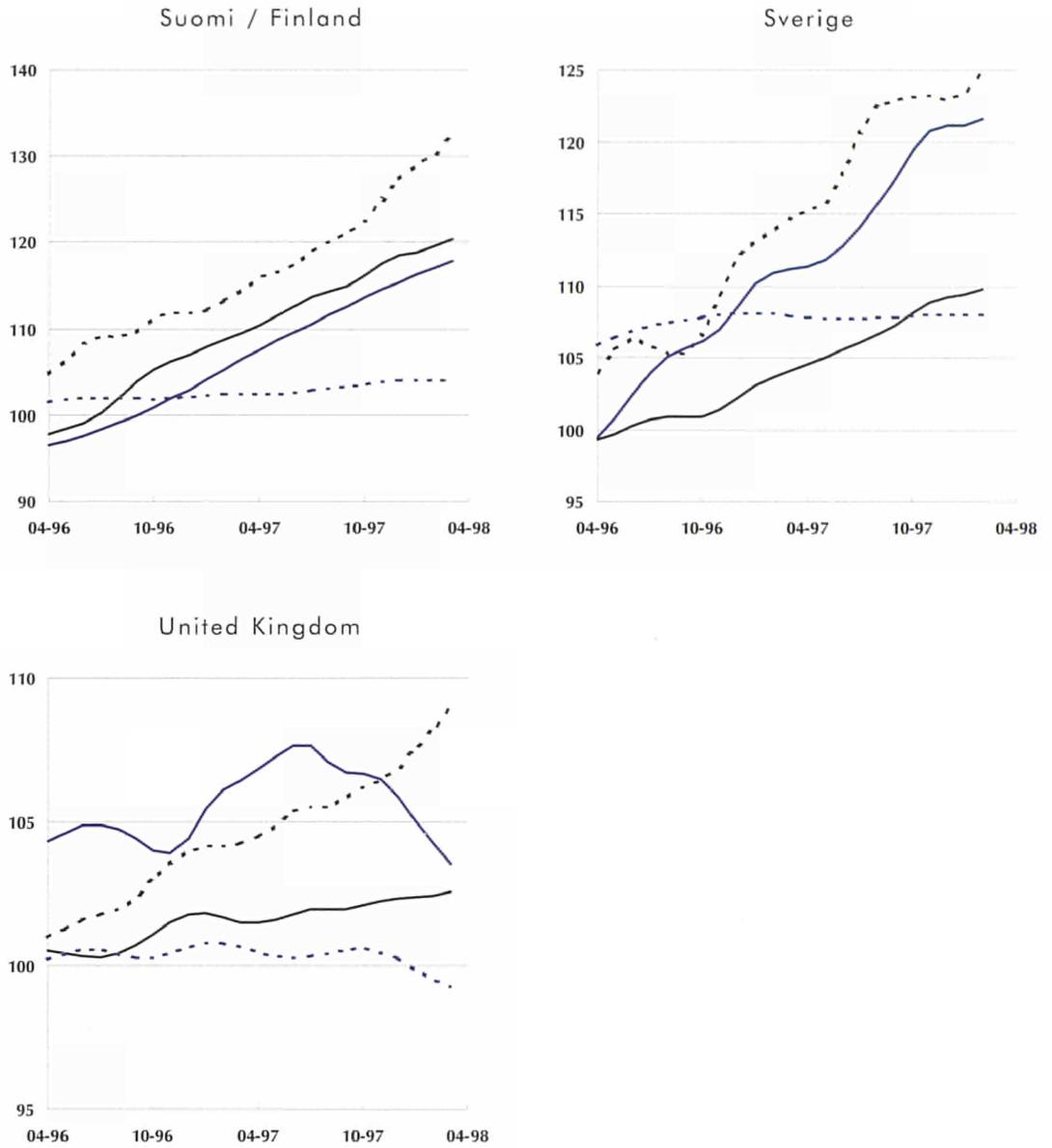


- Intermediate goods
- - - Capital goods
- Consumer durables
- Consumer non-durables

Source:  eurostat

Figure 2.5

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



Intermediate goods ———

Capital goods - - - - -

Consumer durables ———

Consumer non-durables - - - - -

Further information - the production index:

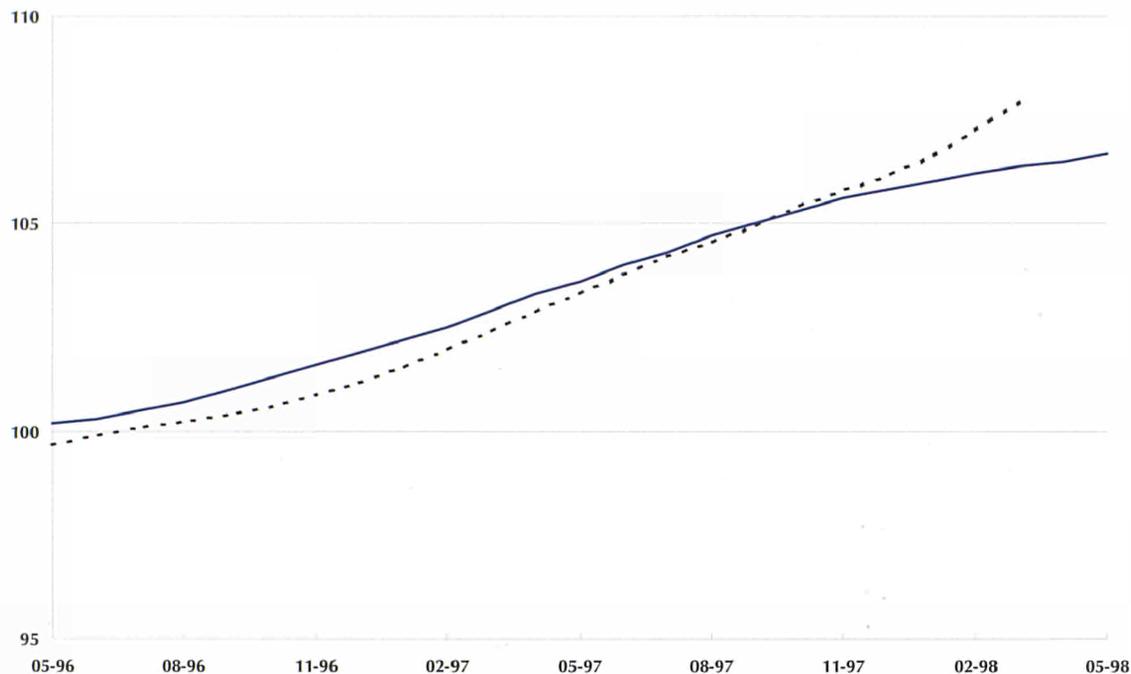
The index of production aims to measure changes in volume (at constant prices) of gross value added created by a given activity, the activity indices being aggregated (like the aggregation at Community level) by means of a system of weighting according to gross value added at factor cost. Since the monthly evolution of value added can not be measured, as an approximation, product output or deflated turnover is used.

The indices of production are adjusted in two stages. Firstly, account is taken of the variation in the number of working days in the month. The national Statistical Offices provide Eurostat with these series (except Denmark, France and Spain). Secondly, for EU-15 and most of the Member States a correction is made using seasonal adjustment with TRAMO / SEATS, a method developed by Professor Maravall and V. Gomez. For France, Finland, Sweden and the United Kingdom, the indices are adjusted by the national statistical offices themselves. For Germany, the trend and seasonally adjusted figures are calculated by the German NSO. Full methodological notes may be found on page 73.

Source: eurostat

Production index (expected output index)

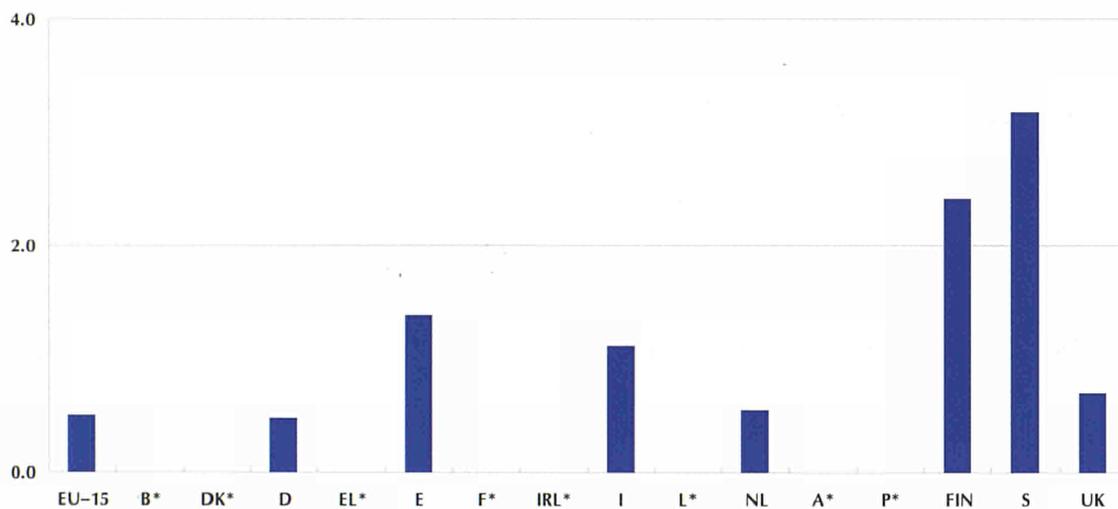
Figure 2.6



EU-15 expected output index for total industry: indices (1995 = 100)

----- Production index
 ——— Expected output index

Expected output index for total industry, three months compared to the previous three months, 03-98 to 05-98 (%)



Source: eurostat

Further information - expected output index:

The Expected Output Index (EOI) links several aspects of information from qualitative business opinion surveys (questions on order books and questions on production expectations) with the index of industrial production. As the data from the business opinion surveys are available earlier and lead the evolution of industrial production, they can be used to compute a short-term estimate of the production index.

A multiple regression is run, using the growth rate of the industrial production lagged with values of the business opinion survey data. The result of this regression is "integrated" from a growth rate to an evolution, and after that the trend cycle is calculated for a clearer interpretation of the results.

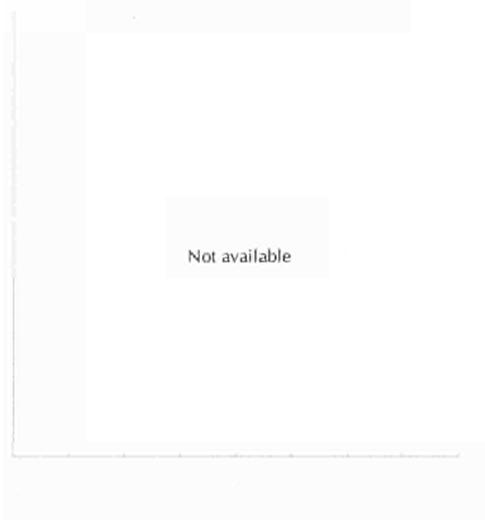
Details of the estimation method can be found in a more thorough article that was published in Special Edition 5/97 of the Monthly Panorama of the European Industry.

Full methodological notes may be found on page 73.

Figure 2.7

Expected output index for total industry: indices (1995 = 100)

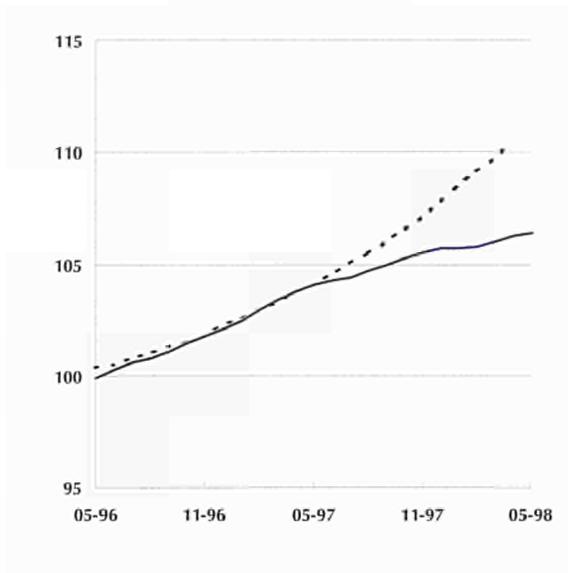
Belgique / België



Danmark



Deutschland

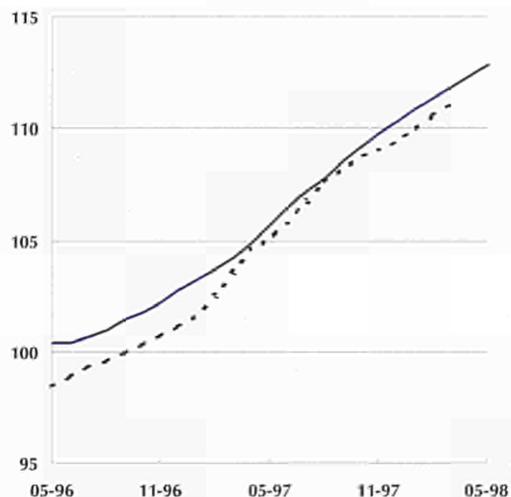


Ellada

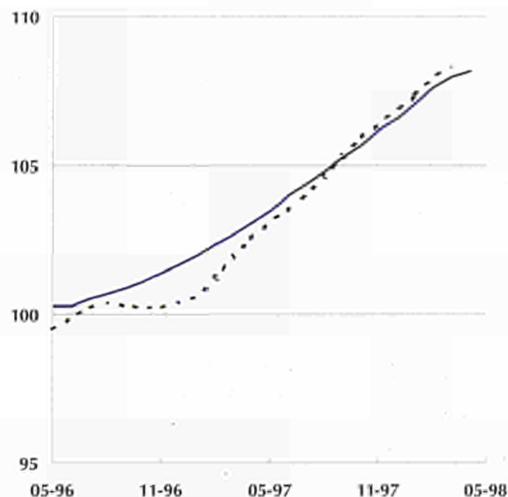


España

Production index - - - -
Expected output index —



France



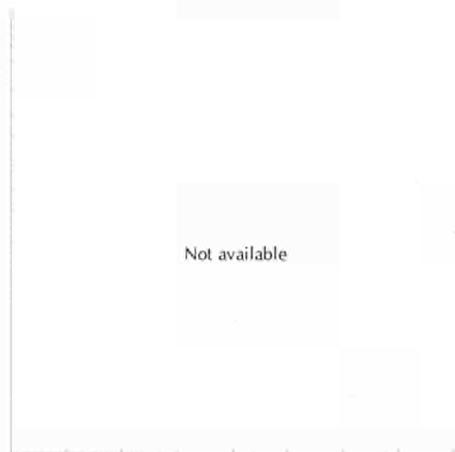
Source: eurostat

Production index (expected output index)

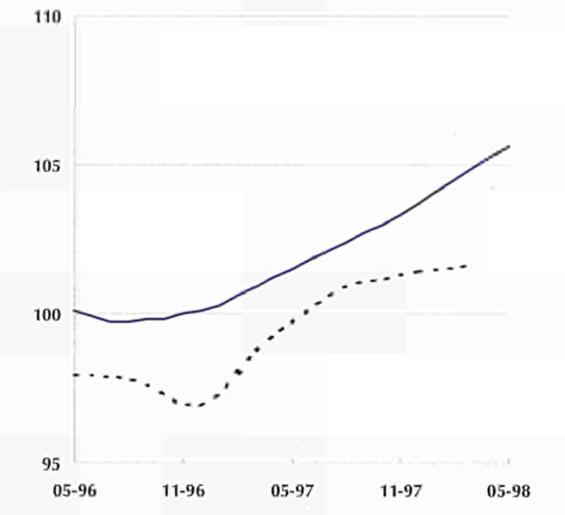
Figure 2.7

Expected output index for total industry: indices (1995 = 100)

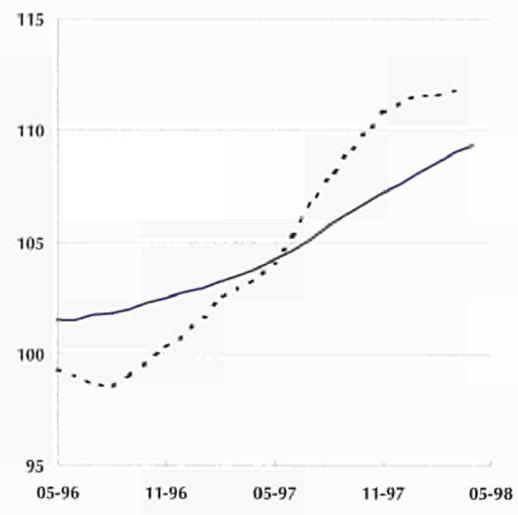
Ireland



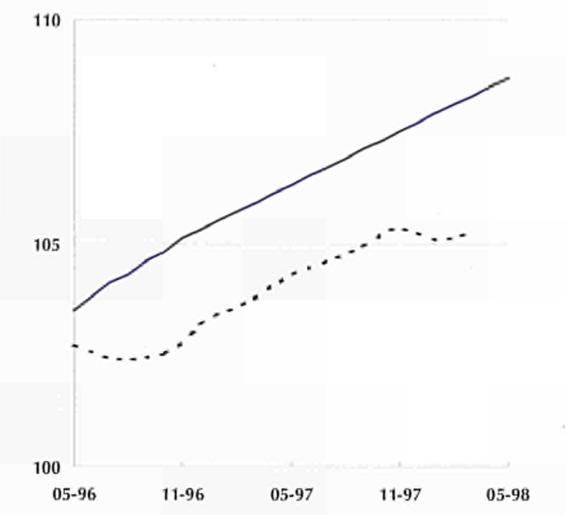
Italia



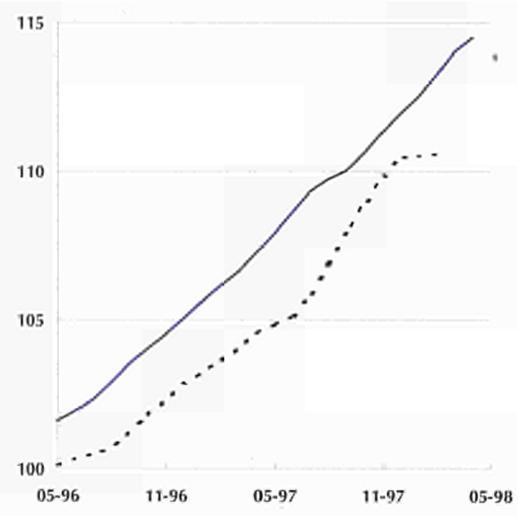
Luxembourg



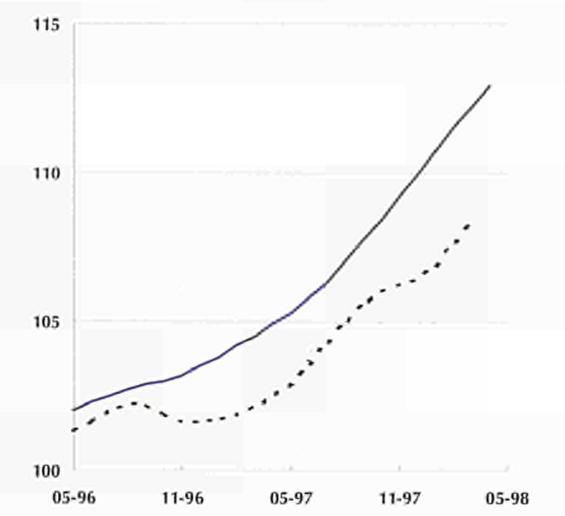
Nederland



Österreich



Portugal

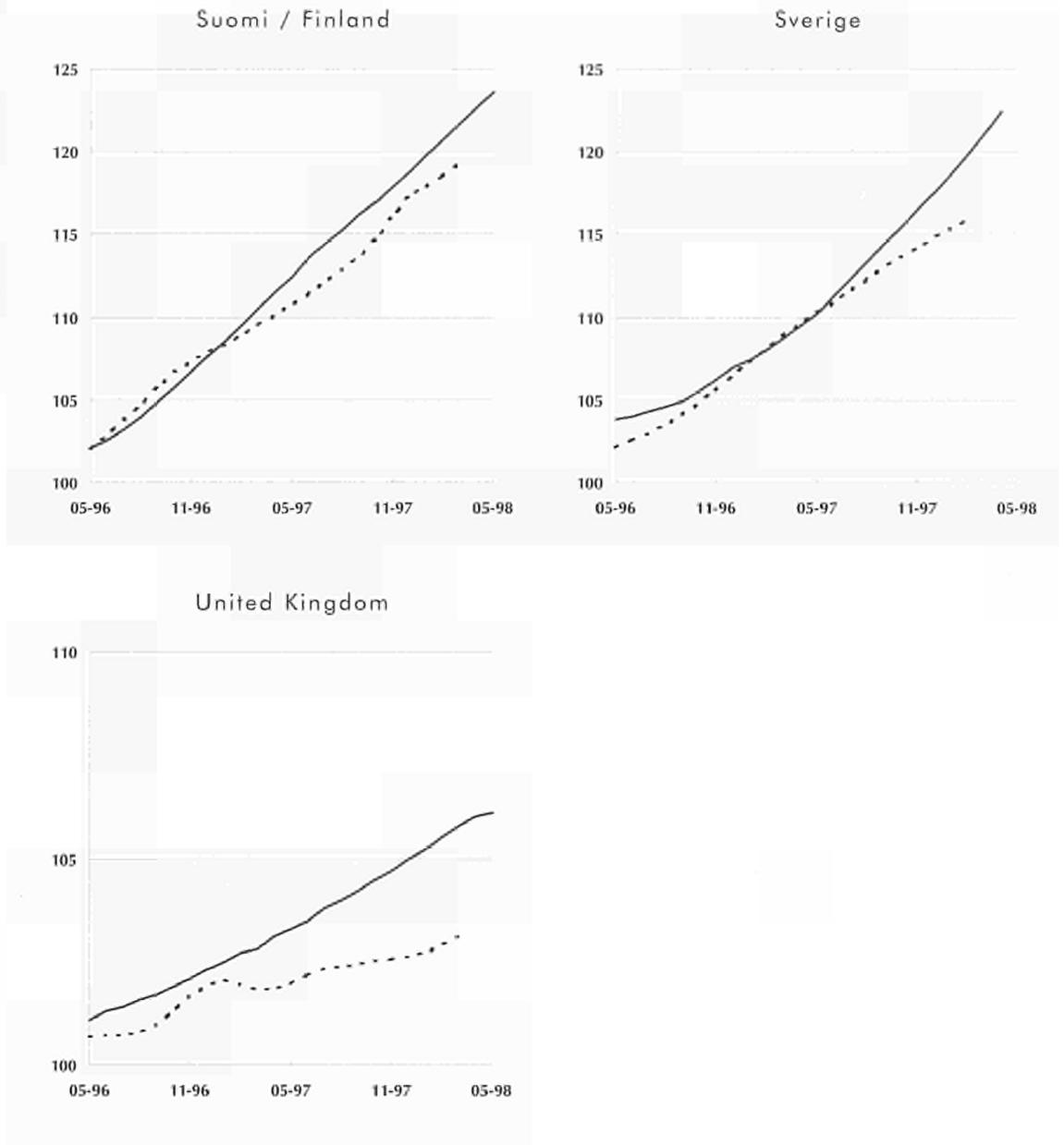


----- Production index
 ——— Expected output index

Source: eurostat

Figure 2.7

Expected output index
for total industry:
indices
(1995 = 100)



Production index - - - -
Expected output index ———

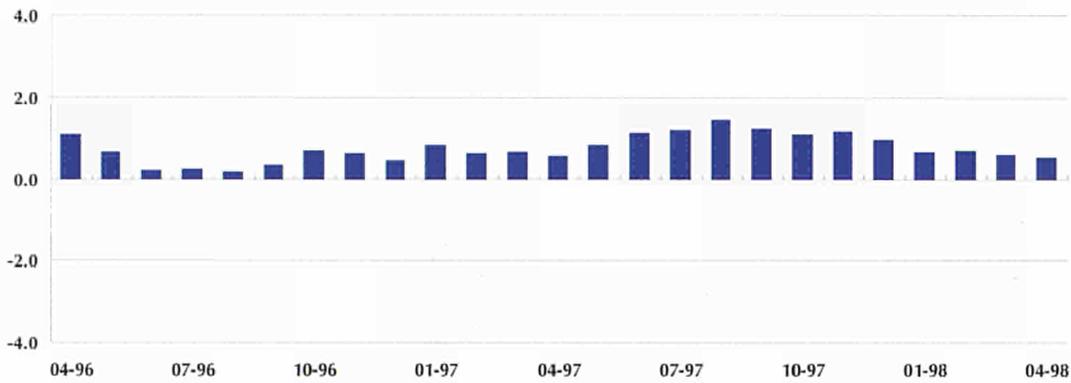
Source:  eurostat

Domestic producer price index

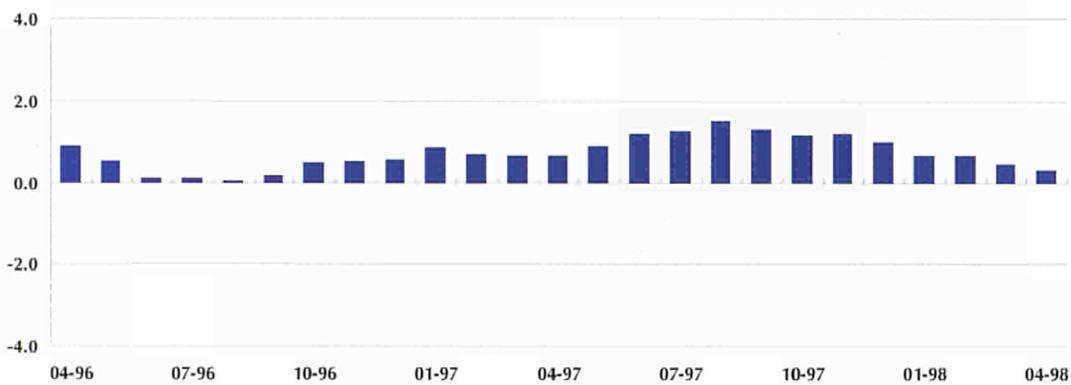
Figure 2.8

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

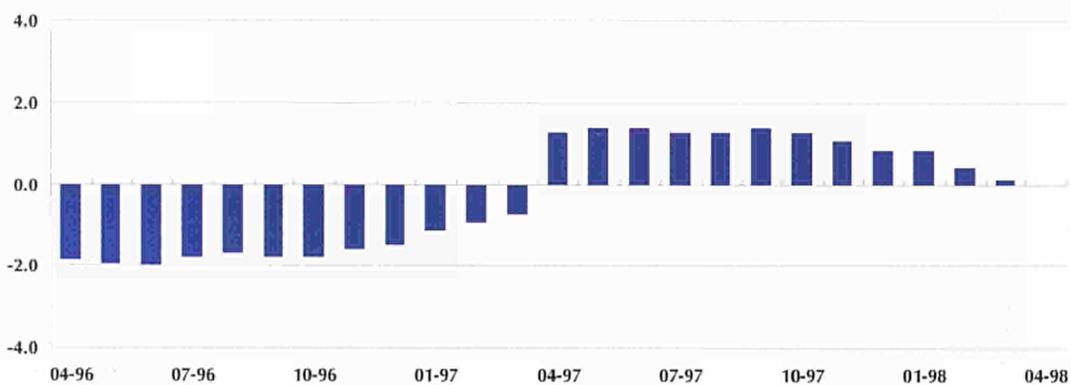
EU-15



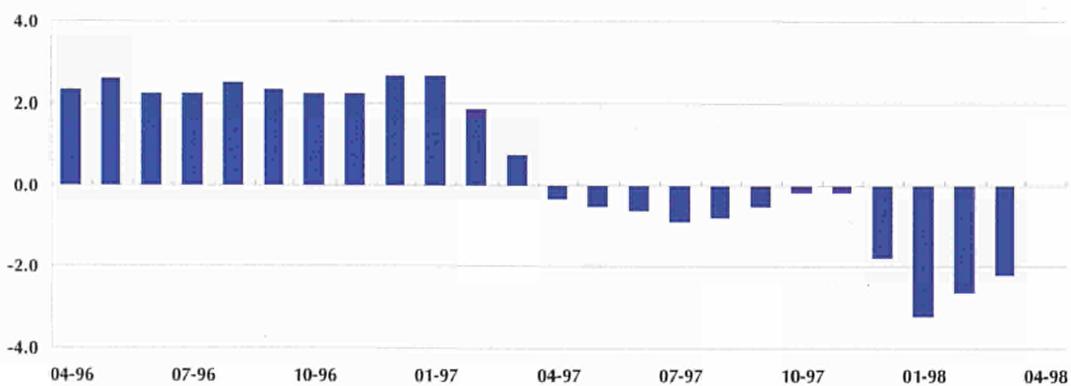
EUR11



Japan



USA

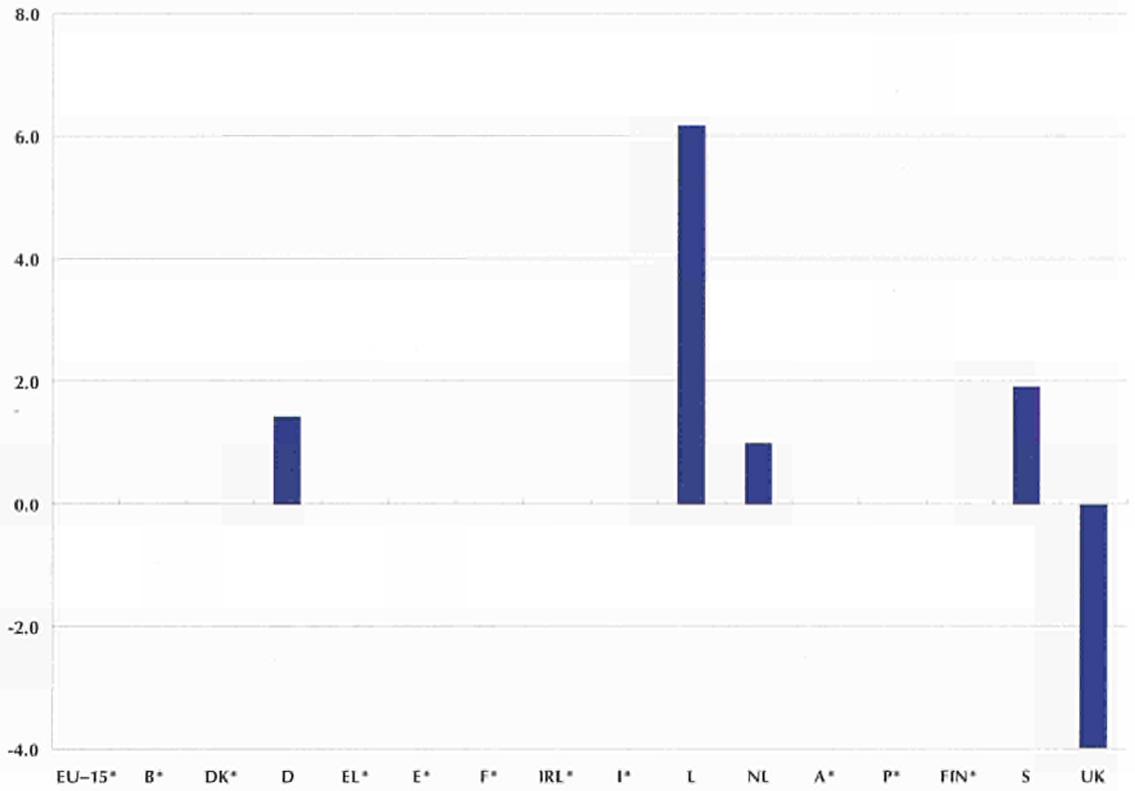


Source: Eurostat

Export price index and domestic producer price index

Figure 2.9

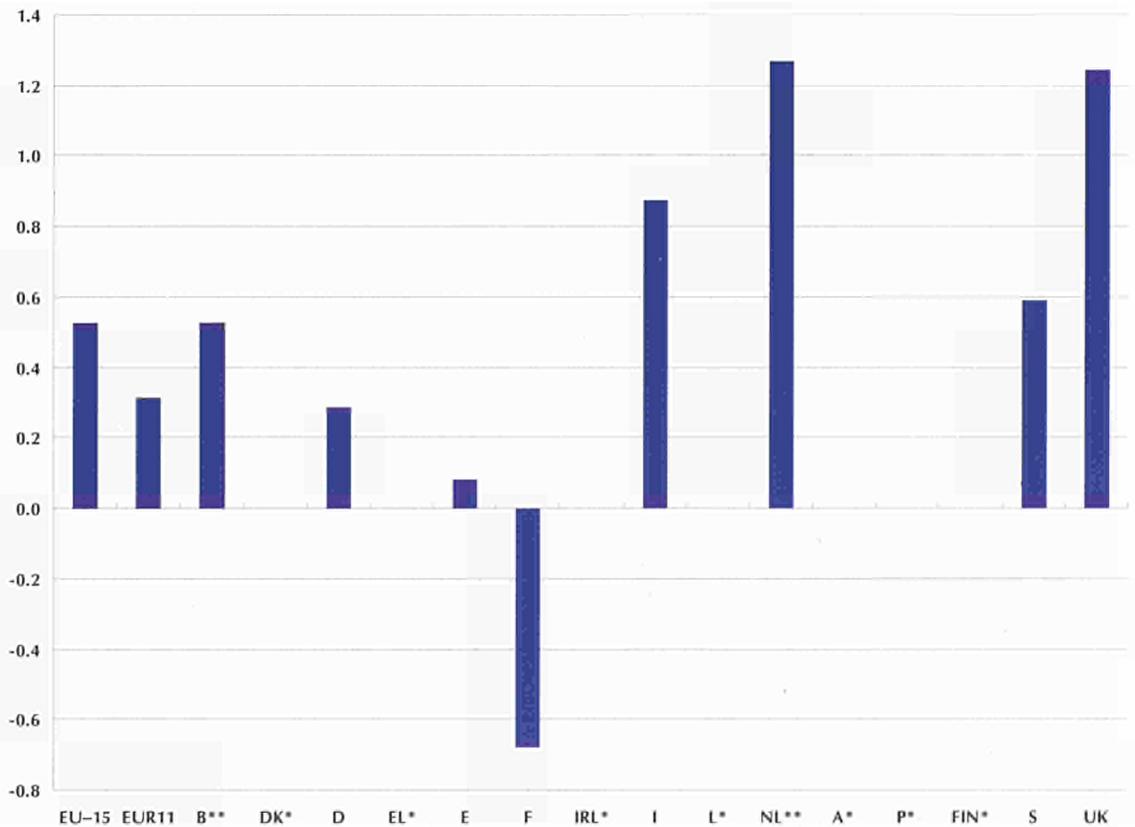
Export prices for manufacturing industry: growth rate, year on year, 02-98 (%)



Source: eurostat

Figure 2.10

Domestic producer price index: growth rate, year on year, 04-98 (%)



Source: eurostat

Domestic producer price index

Table 2.6

	1995	1996	1997	12-97	01-98	02-98	03-98	04-98	05-98
EU-15	100.0	100.8	101.8	102.4	102.3	102.2	102.0	101.9	:
B	100.0	100.6	102.3	102.4	101.9	101.6	:	:	:
DK	100.0	101.6	103.7	103.2	102.2	102.3	102.6	:	:
D	100.0	99.6	100.7	100.9	100.8	100.8	100.7	100.7	:
EL	100.0	107.4	111.0	112.1	111.8	111.7	112.9	:	:
E	100.0	101.7	102.7	103.1	102.8	102.6	102.5	102.5	:
F	100.0	100.5	100.7	100.7	100.5	100.4	99.8	99.7	:
IRL	100.0	101.8	101.9	102.1	101.9	:	:	:	:
I	100.0	101.9	103.2	103.8	103.9	103.9	103.8	103.8	:
L	100.0	99.6	101.4	102.3	103.4	103.4	103.6	:	:
NL	100.0	101.8	104.5	104.7	105.0	104.9	:	:	:
A	:	:	:	:	:	:	:	:	:
P	100.0	103.1	104.7	104.7	:	:	:	:	:
FIN	100.0	99.9	101.3	101.9	:	:	:	:	:
S	100.0	100.6	101.7	102.1	102.1	101.9	101.6	101.7	:
UK	100.0	100.8	101.2	103.1	103.1	102.7	102.1	101.8	101.5
Japan	100.0	98.2	98.9	98.7	98.7	98.4	98.1	:	:
USA	100.0	102.4	102.3	101.6	100.6	100.3	99.8	:	:

Domestic producer
price index:
indices
(1995 = 100)

Source:  eurostat

Table 2.7

	1995	1996	1997	12-97	01-98	02-98	03-98	04-98	05-98
EU-15	100.0	102.2	104.9	105.7	105.6	105.5	105.3	105.2	:
B	100.0	98.7	97.3	96.8	96.4	96.1	:	:	:
DK	100.0	101.1	101.5	100.4	99.5	99.6	99.6	:	:
D	100.0	97.7	96.0	95.7	95.6	95.6	95.3	95.3	:
EL	100.0	106.6	108.8	109.2	108.4	108.4	103.1	:	:
E	100.0	103.1	100.9	100.6	100.0	99.9	99.5	99.3	:
F	100.0	100.9	99.4	99.3	99.1	99.0	98.1	98.1	:
IRL	100.0	104.7	111.2	109.1	105.7	:	:	:	:
I	100.0	110.8	113.9	114.1	113.7	113.5	113.3	113.0	:
L	100.0	97.7	96.5	96.7	97.8	97.8	97.7	:	:
NL	100.0	99.9	99.2	98.6	98.9	98.8	:	:	:
A	:	:	:	:	:	:	:	:	:
P	100.0	103.3	103.4	101.7	:	:	:	:	:
FIN	100.0	97.9	98.3	97.4	:	:	:	:	:
S	100.0	110.1	109.5	109.9	109.1	107.9	109.6	111.0	:
UK	100.0	102.8	121.2	127.6	128.4	128.1	129.6	129.2	124.2
Japan	100.0	87.1	88.5	83.9	85.8	88.0	85.8	:	:
USA	100.0	105.5	118.0	119.5	120.9	120.5	120.4	:	:

Domestic producer
price index
in ECU terms:
indices
(1995 = 100)

Source:  eurostat

Figure 2.11

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

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

Source: 

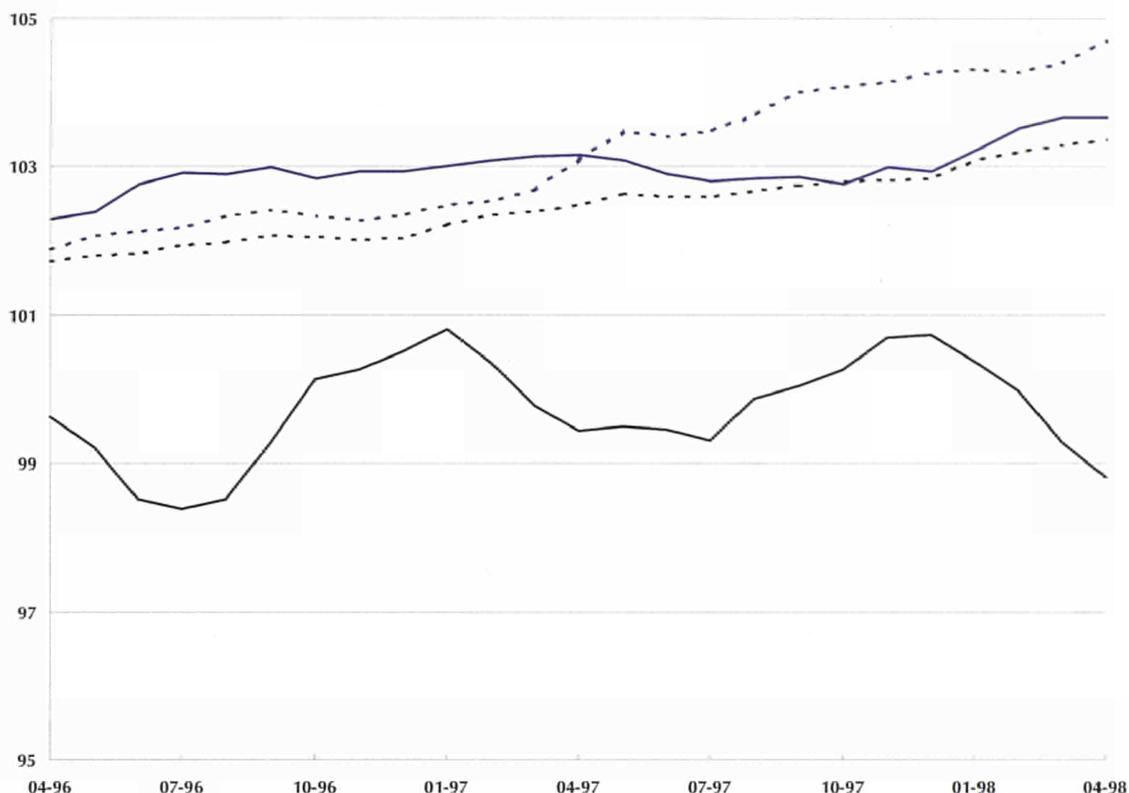


Table 2.8

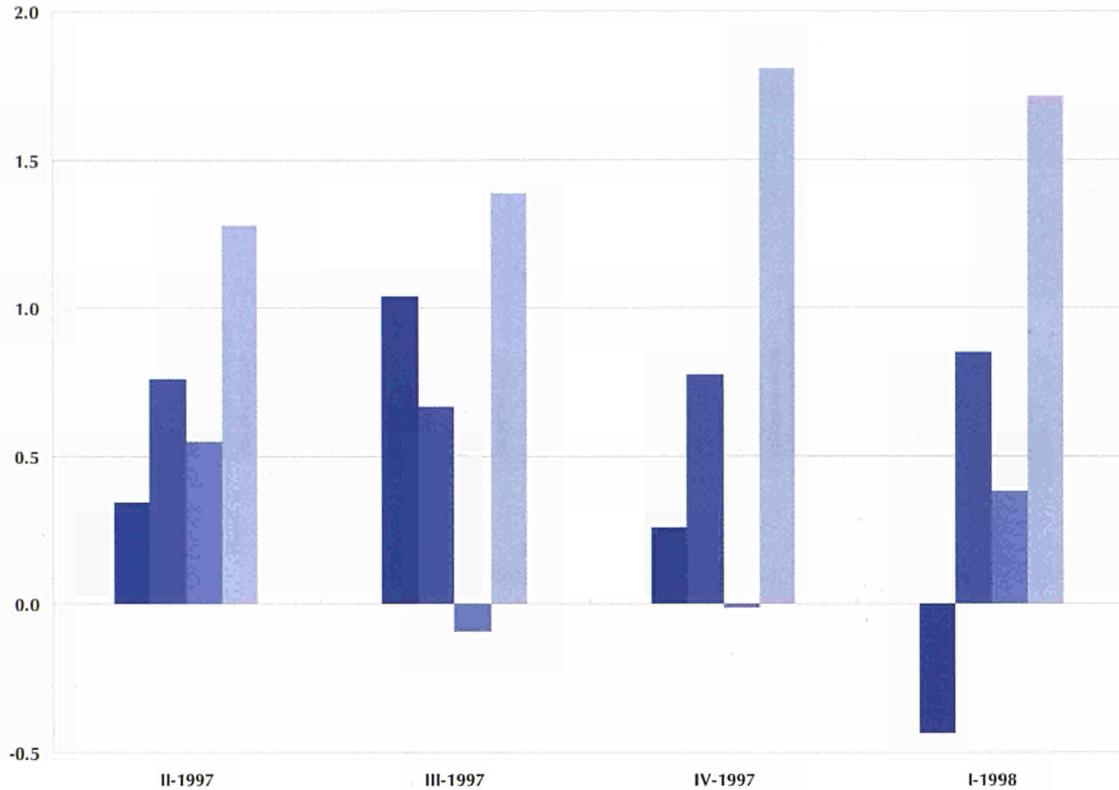
Domestic producer price index for the main industrial groupings: indices (1995 = 100)

Source: 

	1995	1996	1997	11-97	12-97	01-98	02-98	03-98	04-98
Total industry									
EU-15	100.0	100.8	101.8	102.3	102.4	102.3	102.2	102.0	101.9
Japan	100.0	98.2	98.9	98.8	98.7	98.7	98.4	98.1	:
USA	100.0	102.4	102.3	102.5	101.6	100.6	100.3	99.8	:
Intermediate goods									
EU-15	100.0	99.5	100.0	100.7	100.7	100.4	100.0	99.3	98.8
Japan	:	:	:	:	:	:	:	:	:
USA	:	:	:	:	:	:	:	:	:
Capital goods									
EU-15	100.0	101.8	102.6	102.8	102.8	103.1	103.2	103.3	103.4
Japan	:	:	:	:	:	:	:	:	:
USA	:	:	:	:	:	:	:	:	:
Consumer durables									
EU-15	100.0	102.5	103.0	103.0	102.9	103.2	103.5	103.7	103.7
Japan	:	:	:	:	:	:	:	:	:
USA	:	:	:	:	:	:	:	:	:
Consumer non-durables									
EU-15	100.0	102.0	103.4	104.1	104.3	104.3	104.3	104.4	104.7
Japan	:	:	:	:	:	:	:	:	:
USA	:	:	:	:	:	:	:	:	:

Domestic producer price index

Figure 2.12



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

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

Source: eurostat



Table 2.9

	Latest month available	Total industry	Intermediate goods	Capital goods	Consumer durables	Consumer non-durables
EU-15	04-98	0.5	-0.6	0.9	0.5	1.6
B	02-98	0.4	-0.6	0.1	:	4.1
DK	03-98	0.5	0.0	2.1	1.8	0.2
D	04-98	0.3	-0.2	0.7	0.2	1.0
EL	03-98	3.1	1.8	7.6	4.7	3.8
E	04-98	0.1	-0.3	0.7	0.4	0.8
F	04-98	-0.7	-1.9	-0.8	-0.3	1.3
IRL	01-98	0.0	:	:	:	0.5
I	04-98	0.9	-0.1	1.7	1.1	2.2
L	03-98	3.4	5.9	1.3	-3.3	-0.3
NL	02-98	1.2	0.3	1.6	1.4	3.6
A	:	:	:	:	:	:
P	12-97	0.5	-0.1	:	:	1.7
FIN	12-97	1.8	1.8	1.1	1.6	2.2
S	04-98	0.6	-2.0	2.5	1.0	2.0
UK	05-98	1.1	-2.2	0.6	0.2	1.5
Japan	03-98	0.1	:	:	:	:
USA	03-98	-2.2	:	:	:	:

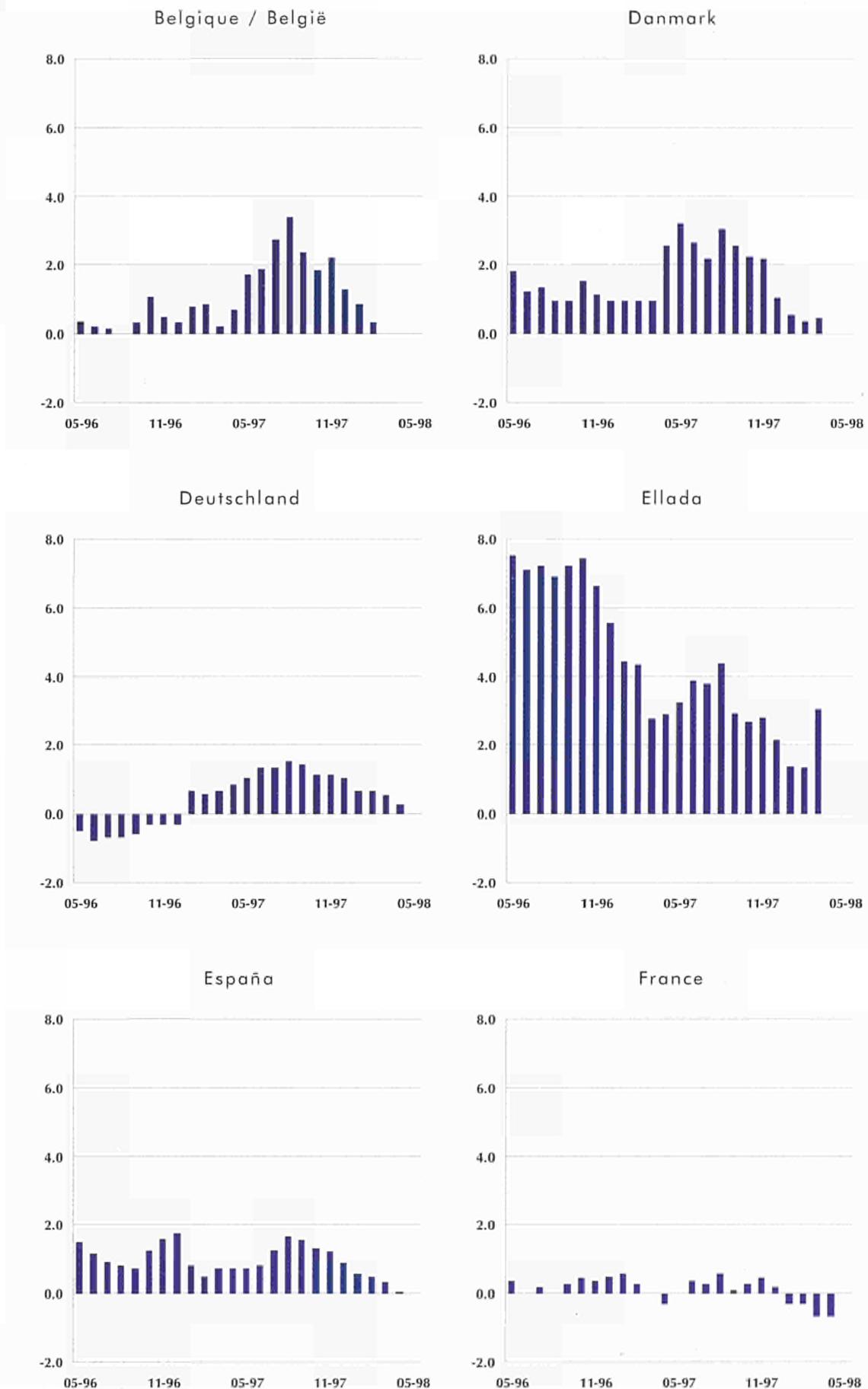
Domestic producer price index for the main industrial groupings: growth rate, year on year (%)

Source: eurostat



Figure 2.13

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

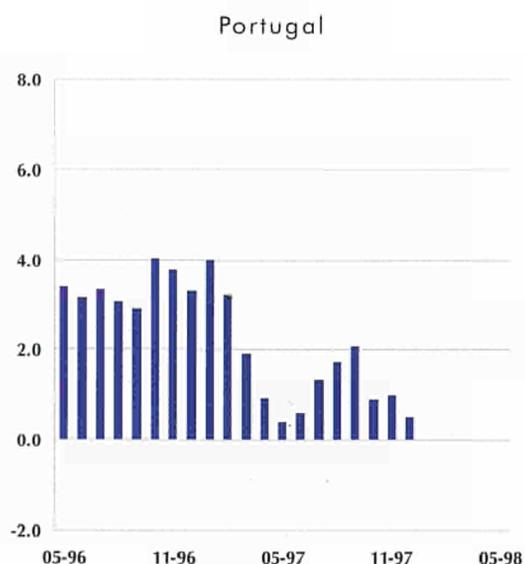
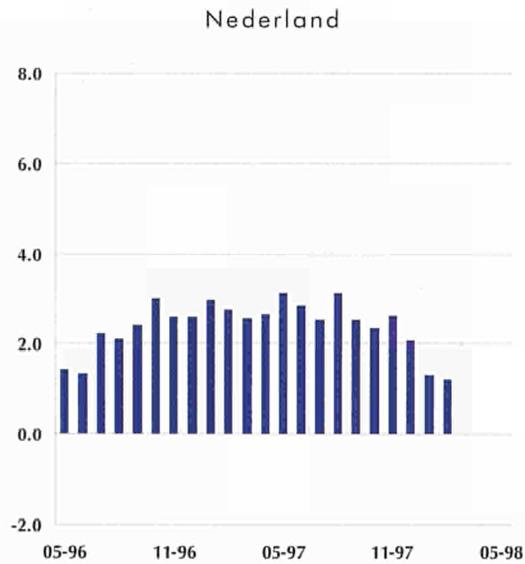
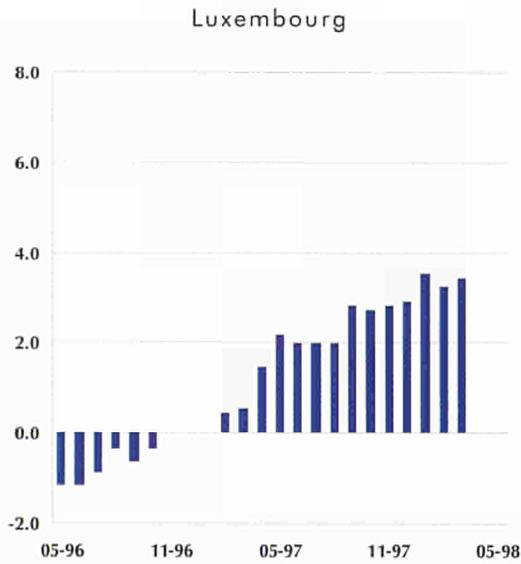
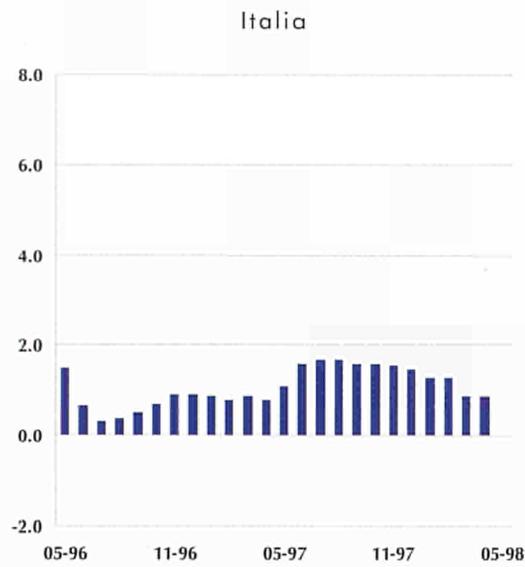
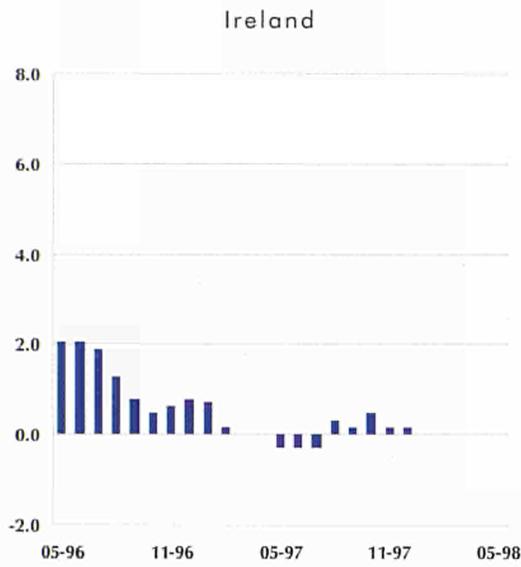


Source:  eurostat

Domestic producer price index

Figure 2.13

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

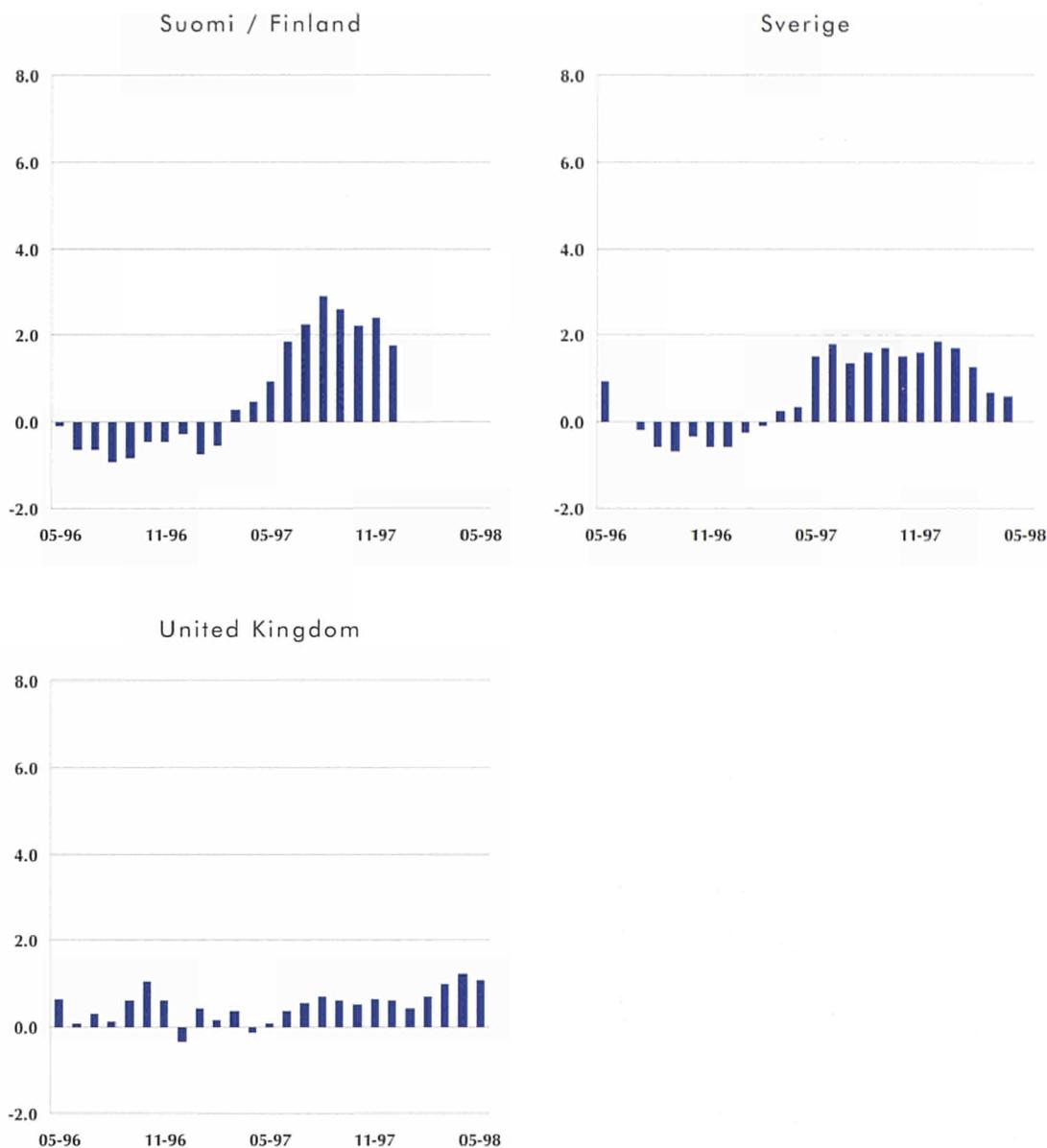


Source: eurostat



Figure 2.13

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



Further information - price indices:

The index of domestic producer prices shows (in the national currency of the Member State in question) changes in the ex-works selling prices of all products sold on the domestic market. Since we deal with producer prices, imports are not included in these price indices. The Community indices (EU-14, since there are no producer price indices for Austria yet) refer to overall weighted price changes. Producer price indices are not seasonally adjusted. The system used for the collection of export price indices is a duplicate of the model for domestic producer price indices.

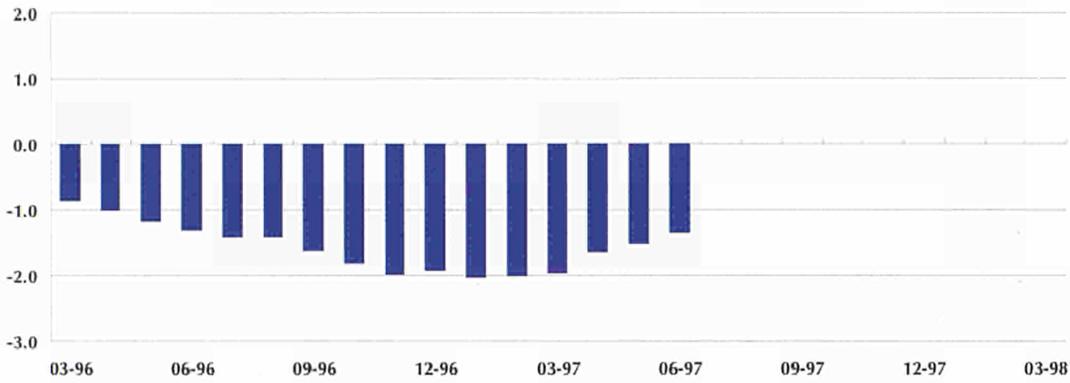
Full methodological notes may be found on page 73.

Employment index

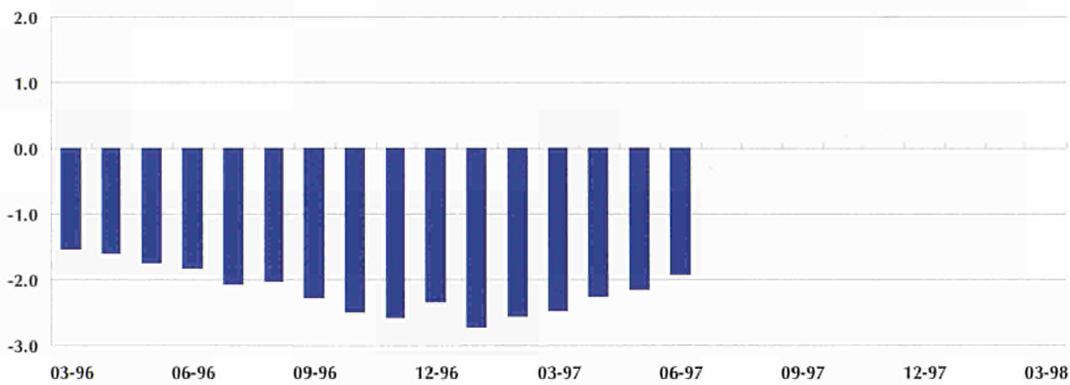
Figure 2.14

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

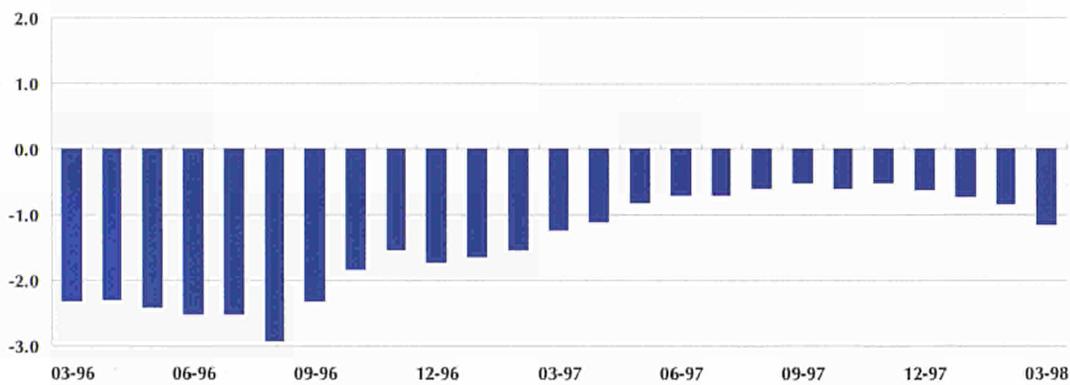
EU-15



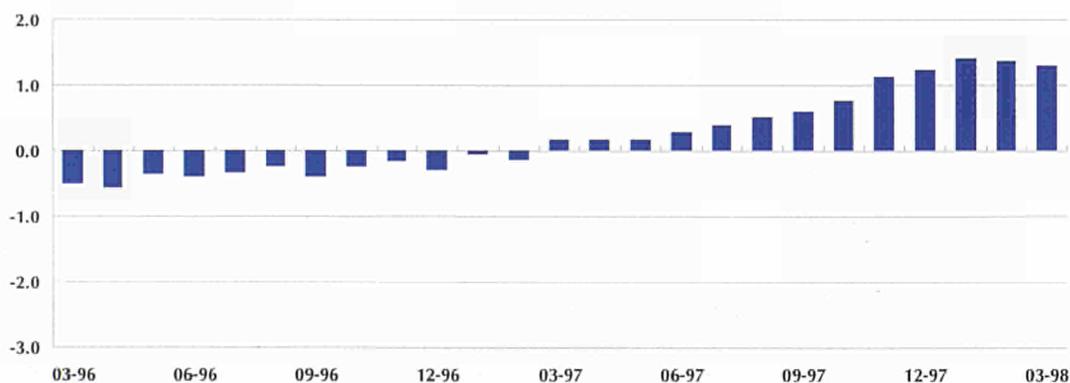
EUR11



Japan



USA



Source:  eurostat

Figure 2.15

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

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

Source: 

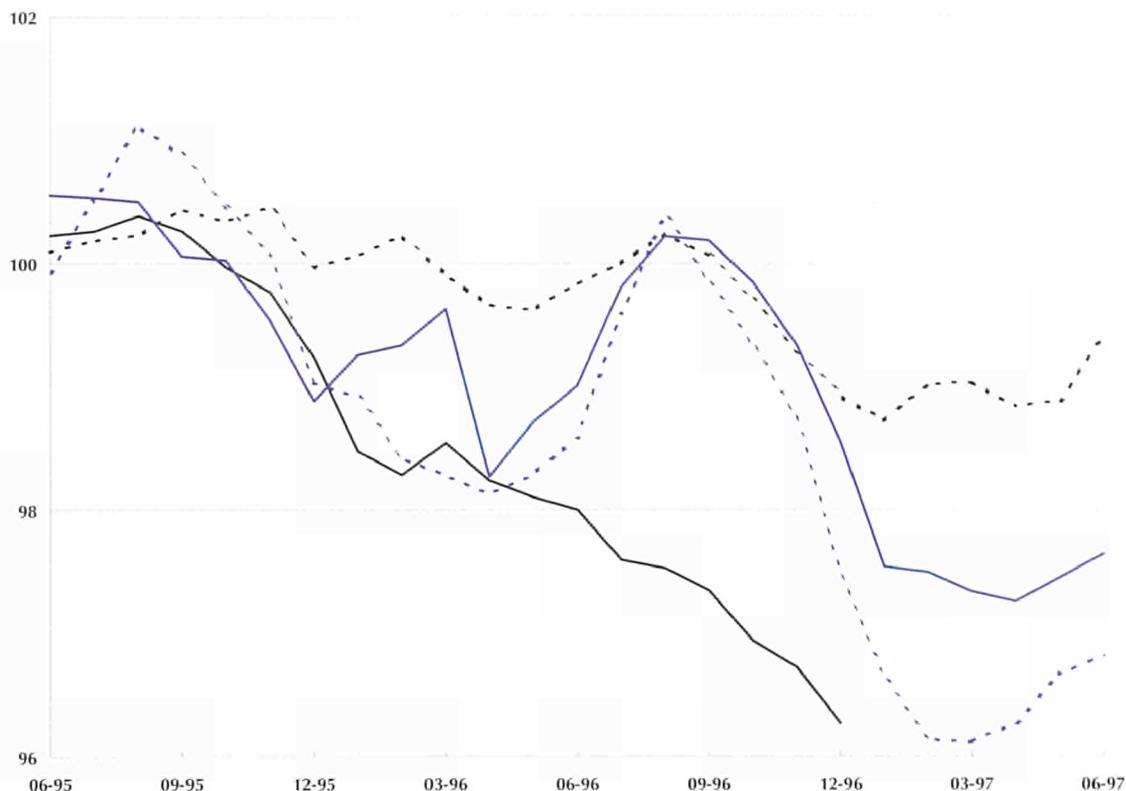


Table 2.10

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

Source: 

	Latest 3 months available		Total industry	Intermediate goods	Capital goods	Consumer durables	Consumer non-durables
EU-15	04-97	⇒ 06-97	-0.1	:	0.0	-0.3	-0.2
B	11-97	⇒ 01-98	:	:	:	-1.3	0.4
DK		⇒	:	:	:	:	:
D	10-97	⇒ 12-97	-0.3	-0.6	-0.3	-0.7	-0.9
EL	04-97	⇒ 06-97	0.0	-0.1	-4.5	0.9	-1.2
E	01-98	⇒ 03-98	-0.6	-0.2	0.8	-0.5	-0.1
F	10-97	⇒ 12-97	0.2	:	:	:	:
IRL	01-97	⇒ 03-97	1.8	1.3	3.4	:	:
I	04-97	⇒ 06-97	-0.5	:	0.3	-0.7	-0.7
L	01-98	⇒ 03-98	0.0	-1.0	2.3	2.3	-0.5
NL	07-96	⇒ 09-96	-1.7	:	:	:	:
A	12-97	⇒ 02-98	0.8	0.7	1.2	-0.4	-1.0
P	10-97	⇒ 12-97	-0.3	0.0	0.1	0.3	-0.4
FIN	04-96	⇒ 06-96	0.2	:	:	:	:
S	07-97	⇒ 09-97	0.6	:	:	:	:
UK	01-98	⇒ 03-98	0.2	0.5	0.0	0.1	0.1
Japan	01-98	⇒ 03-98	-0.4	:	:	:	:
USA	01-98	⇒ 03-98	0.4	:	:	:	:

Employment index

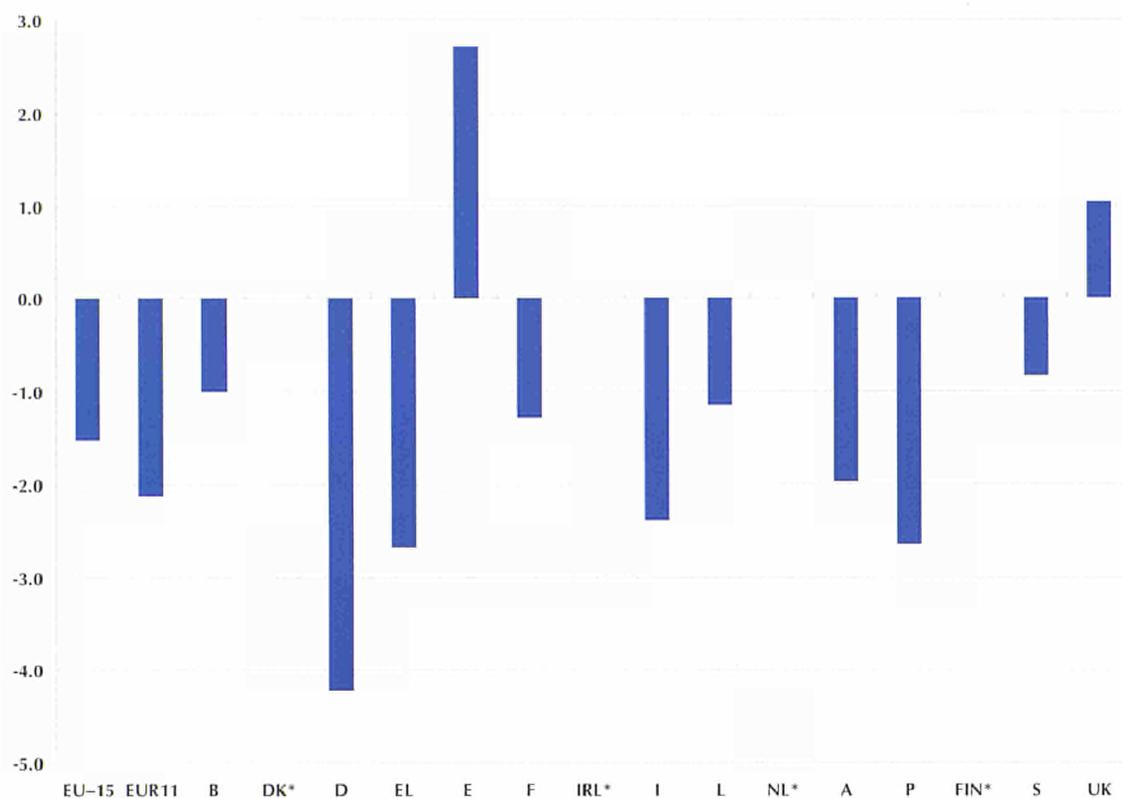


Figure 2.16

Employment index: growth rate, three months compared to the same three months of the previous year, 04-97 to 06-97 (%)

Source: eurostat

	Latest 3 months available		Total industry	Intermediate goods	Capital goods	Consumer durables	Consumer non-durables
	04-97	06-97					
EU-15	04-97	06-97	-1.5	:	-0.7	-1.2	-1.8
B	11-97	01-98	:	:	:	-4.7	0.2
DK			:	:	:	:	:
D	10-97	12-97	-2.2	-2.8	-2.1	-4.1	-4.2
EL	04-97	06-97	-2.7	-1.6	-2.3	0.5	-6.1
E	01-98	03-98	5.0	6.6	10.1	1.2	1.0
F	10-97	12-97	-0.8	:	:	:	:
IRL	01-97	03-97	4.3	5.1	5.0	:	:
I	04-97	06-97	-2.4	:	-1.7	-4.1	-4.1
L	01-98	03-98	0.4	-1.3	6.7	1.3	0.3
NL	07-96	09-96	-0.4	:	:	:	:
A	12-97	02-98	-0.3	0.0	3.2	-4.5	-3.6
P	10-97	12-97	-2.3	-0.3	0.2	1.1	-5.1
FIN	04-96	06-96	1.1	:	:	:	:
S	07-97	09-97	-0.3	:	:	:	:
UK	01-98	03-98	0.2	-0.7	1.3	1.0	-0.4
Japan	01-98	03-98	-0.9	:	:	:	:
USA	01-98	03-98	1.4	:	:	:	:

Table 2.11

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

Source: eurostat

Figure 2.17

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

EU-15 construction: production index —
 EU-15 construction: employment index - - -
 EUR11 construction: production index —
 EUR11 construction: employment index - - -

Source: 

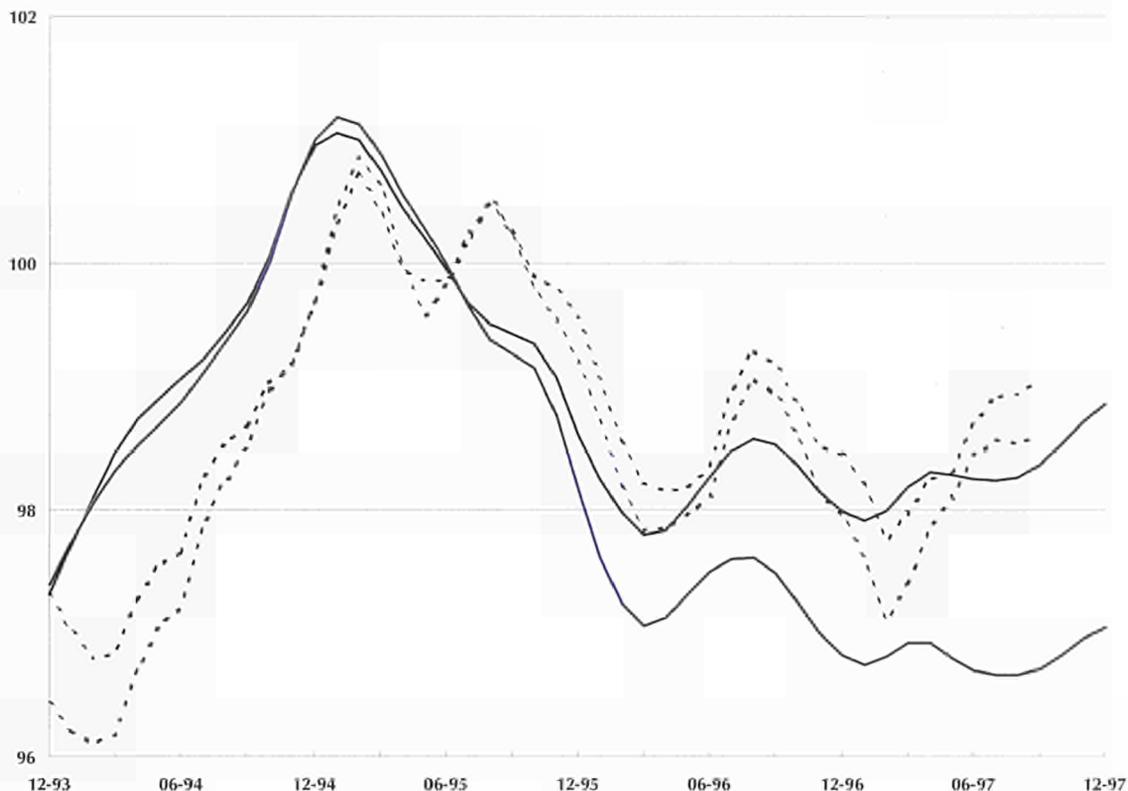
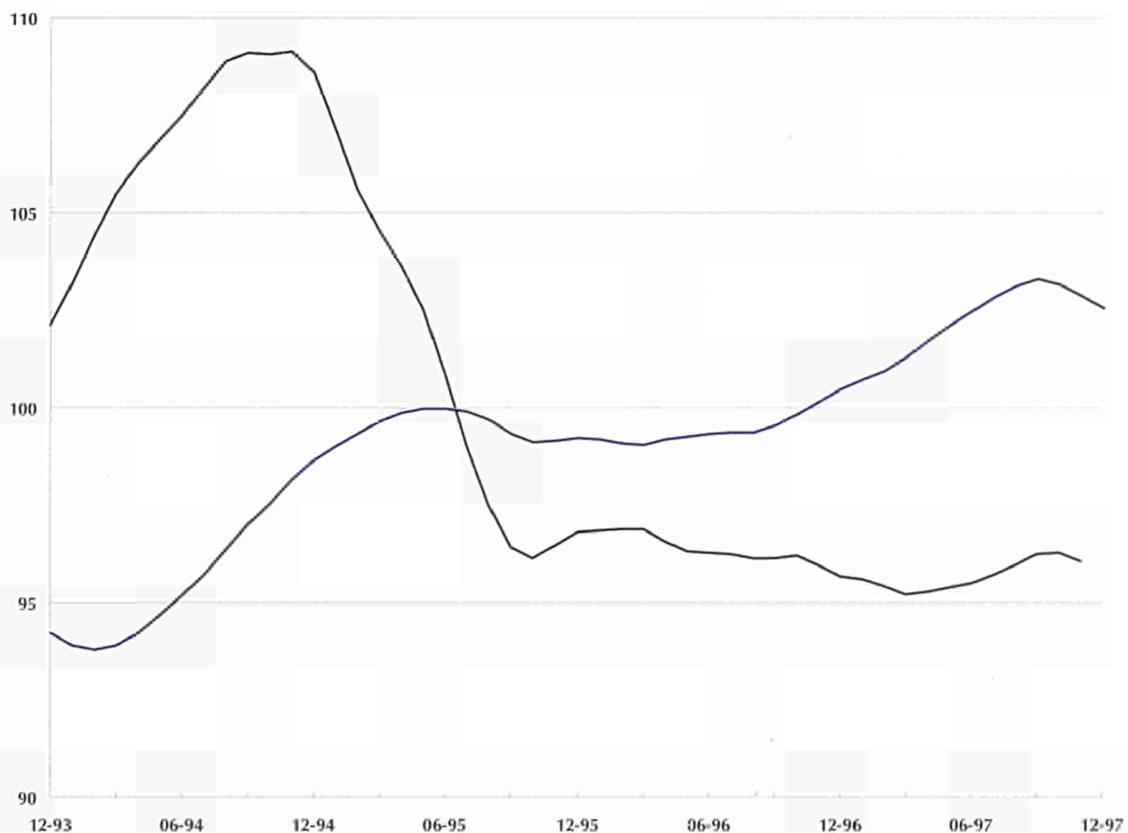


Figure 2.18

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

Residential —
 Non-residential —

Source: 



Production index (working day adjusted & trend cycle)

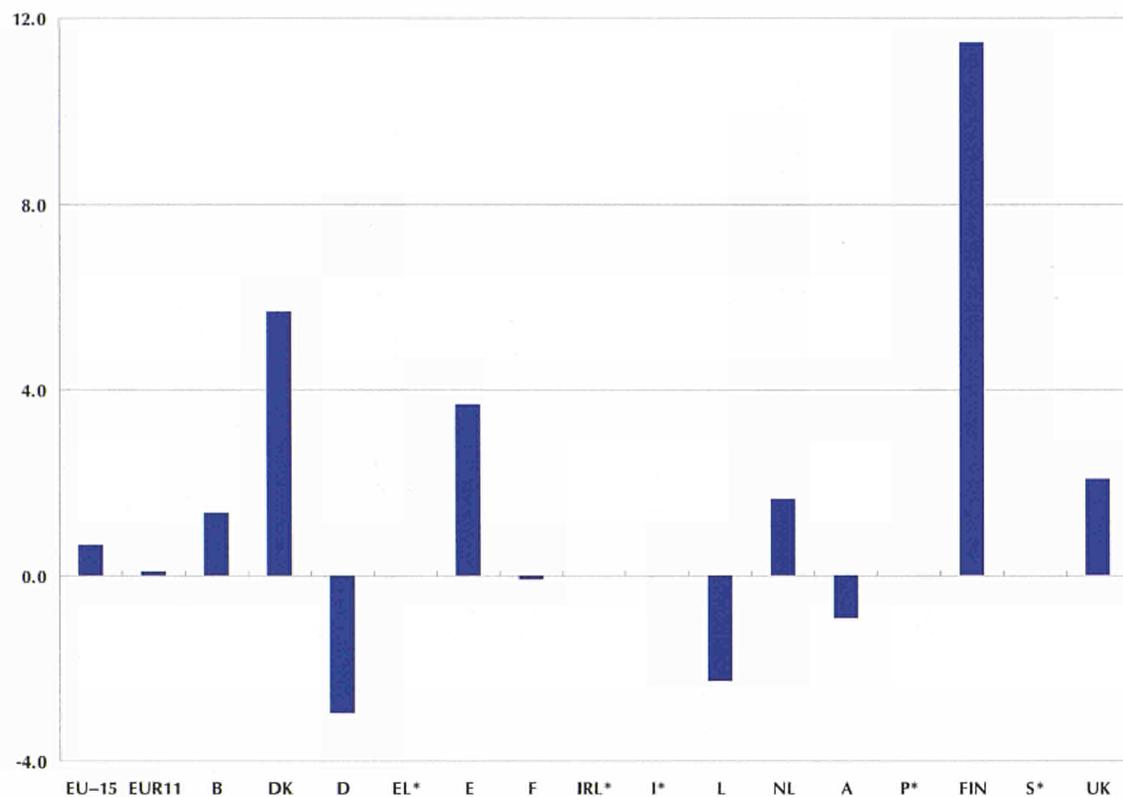


Figure 2.19

Production index for construction: growth rate, three months compared to the same three months of the previous year, 10-97 to 12-97 (%)

Source: eurostat

	Latest 3 months available		Building t/t-1 t/t-4		Latest 3 months available		Civil engineering t/t-1 t/t-4	
	Start	End	Start	End	Start	End	Start	End
EU-15	10-97	⇒ 12-97	1.0	2.0	07-97	⇒ 09-97	0.5	0.0
B	09-94	⇒ 11-94	4.1	:	09-94	⇒ 11-94	6.2	:
DK	01-98	⇒ 03-98	0.1	-3.2	01-98	⇒ 03-98	-5.9	-3.5
D	02-98	⇒ 04-98	-3.8	-9.6	02-98	⇒ 04-98	-1.7	-7.0
EL		⇒	:	:		⇒	:	:
E	10-97	⇒ 12-97	-0.4	6.0	10-97	⇒ 12-97	-2.9	0.5
F	01-98	⇒ 03-98	1.2	4.5	01-98	⇒ 03-98	-0.2	3.3
IRL		⇒	:	:		⇒	:	:
I	10-97	⇒ 12-97	4.5	1.8	07-97	⇒ 09-97	1.0	15.5
L	01-98	⇒ 03-98	-0.2	2.3	01-98	⇒ 03-98	-0.5	13.7
NL	10-97	⇒ 12-97	-2.4	1.8		⇒	:	:
A	10-97	⇒ 12-97	4.5	-1.0	10-97	⇒ 12-97	1.7	-1.8
P		⇒	:	:		⇒	:	:
FIN	10-97	⇒ 12-97	1.3	14.8	10-97	⇒ 12-97	1.3	-1.1
S		⇒	:	:		⇒	:	:
UK	10-97	⇒ 12-97	1.8	4.6	10-97	⇒ 12-97	-3.8	-27.0

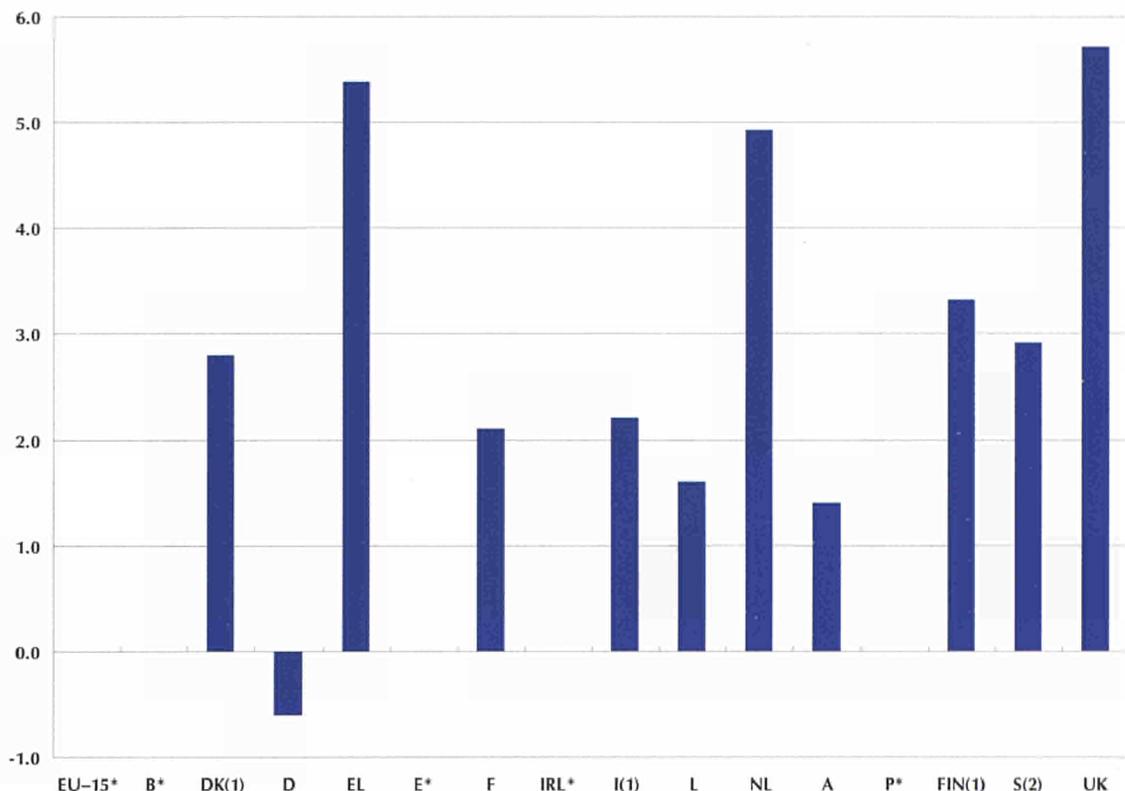
Table 2.12

Production index of building and civil engineering: growth rates (%)

Source: eurostat

Figure 2.20

Output prices for new residential buildings: growth rate, three months compared to the same three months of the previous year, 10-97 to 12-97 (%)



1) input prices
2) input prices and one-dwelling buildings

Source: eurostat

Table 2.13

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

	III-1996	IV-1996	I-1997	II-1997	III-1997	IV-1997	I-1998	II-1998
EU-15	:	:	:	:	:	:	:	:
B	:	:	:	:	:	:	:	:
DK (1)	103.5	104.2	104.9	105.6	106.4	107.1	107.8	107.8
D	99.9	99.7	99.5	99.4	99.4	99.1	98.8	:
EL	106.2	107.4	110.1	110.7	111.9	113.2	115.8	:
E	:	:	:	:	:	:	:	:
F	101.2	102.8	102.9	104.2	104.8	104.9	:	:
IRL (2)	101.4	102.2	103.3	104.5	105.6	:	:	:
I (1)	102.5	103.1	103.3	103.5	105.0	105.3	:	:
L	101.0	101.0	102.1	102.1	102.7	102.7	:	:
NL	102.1	103.0	104.6	105.5	106.3	108.0	108.0	:
A	101.7	101.7	102.4	102.8	103.1	103.1	103.7	:
P	:	:	:	:	:	:	:	:
FIN (1)	99.8	100.3	101.4	102.5	103.7	103.7	103.9	:
S (2)	103.5	103.8	104.8	105.5	106.3	106.9	:	:
UK	102.4	103.4	105.4	106.4	107.4	109.3	:	:

1) input prices
2) input prices and one-dwelling buildings

Source: eurostat

Building permits - useful floor area

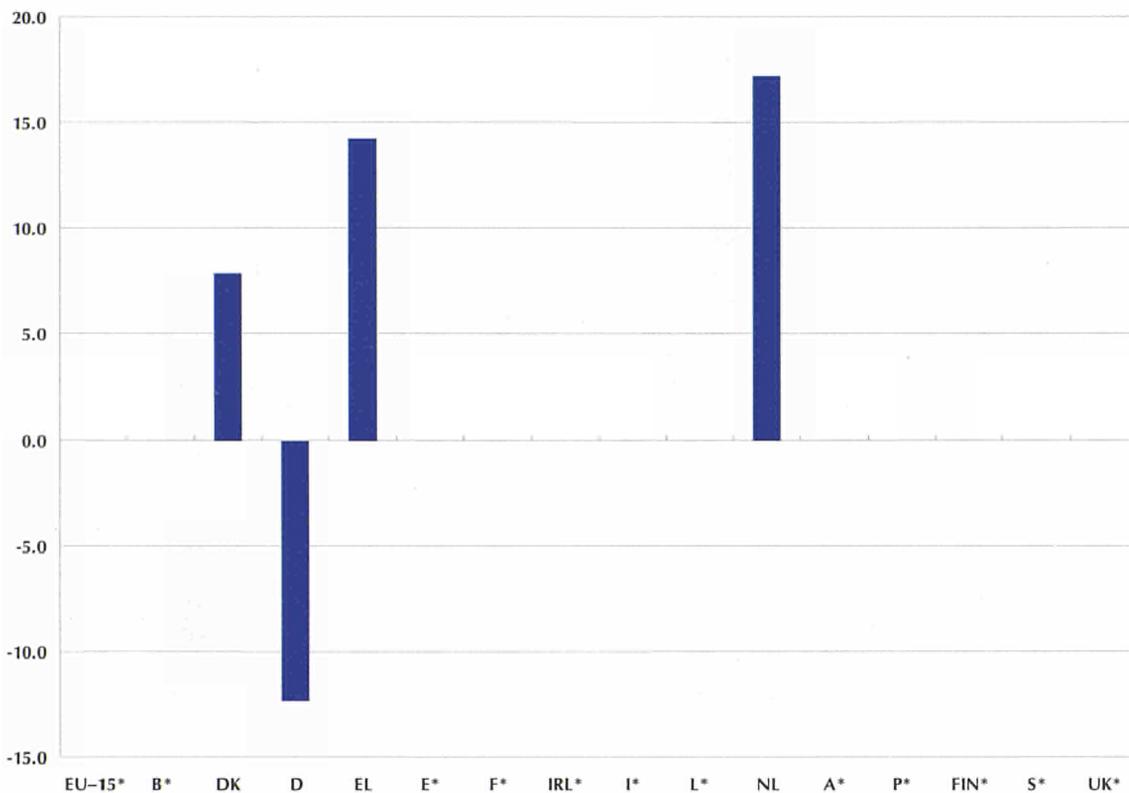


Figure 2.21

Building permits - useful floor area: growth rate, three months compared to the same three months of the previous year, 12-97 to 02-98 (%)

Source: eurostat

	Latest 3 months available		Residential '000m ² 1995=100		Latest 3 months available		Non-residential '000m ² 1995=100			
EU-15	⇨		:	:	10-97	⇨	12-97	:	102.5	
B	10-97	⇨	12-97	2,908	131.7	10-97	⇨	12-97	1,585	99.2
DK	01-98	⇨	03-98	496	129.7	01-98	⇨	03-98	967	91.3
D	01-98	⇨	03-98	10,275	74.5	01-98	⇨	03-98	8,053	74.8
EL		⇨		:	:		⇨		:	:
E	09-97	⇨	11-97	12,885	114.5	09-97	⇨	11-97	2,704	132.5
F		⇨		:	:	10-97	⇨	12-97	8,674	99.1
IRL	10-97	⇨	12-97	1,263	134.3	10-97	⇨	12-97	761	117.0
I	07-97	⇨	09-97	2,563	68.0	07-97	⇨	09-97	3,850	66.2
L	10-97	⇨	12-97	:	154.1	10-97	⇨	12-97	:	89.5
NL	01-98	⇨	03-98	3,775	95.6	01-98	⇨	03-98	5,109	144.5
A		⇨		:	:		⇨		:	:
P		⇨		:	:		⇨		:	:
FIN	11-97	⇨	01-98	443	94.2	11-97	⇨	01-98	428	76.2
S	01-98	⇨	03-98	208	:	01-98	⇨	03-98	553	:
UK		⇨		:	:		⇨		:	:

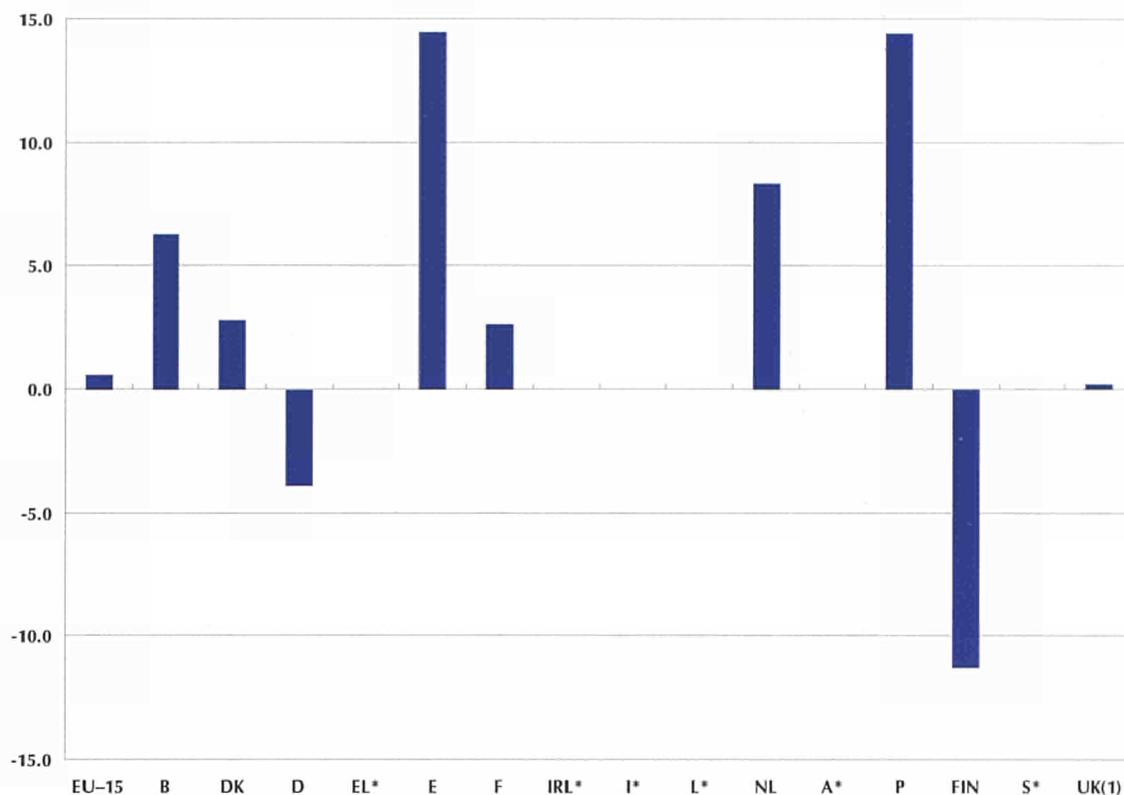
Table 2.14

Building permits - useful floor area: actual values and indices

Source: eurostat

Figure 2.22

Building permits - no. of dwellings: growth rate, three months compared to the same three months of the previous year, 09-97 to 11-97 (%)



1) buildings starts

Source: eurostat

Table 2.15

Number of dwellings authorised (units)

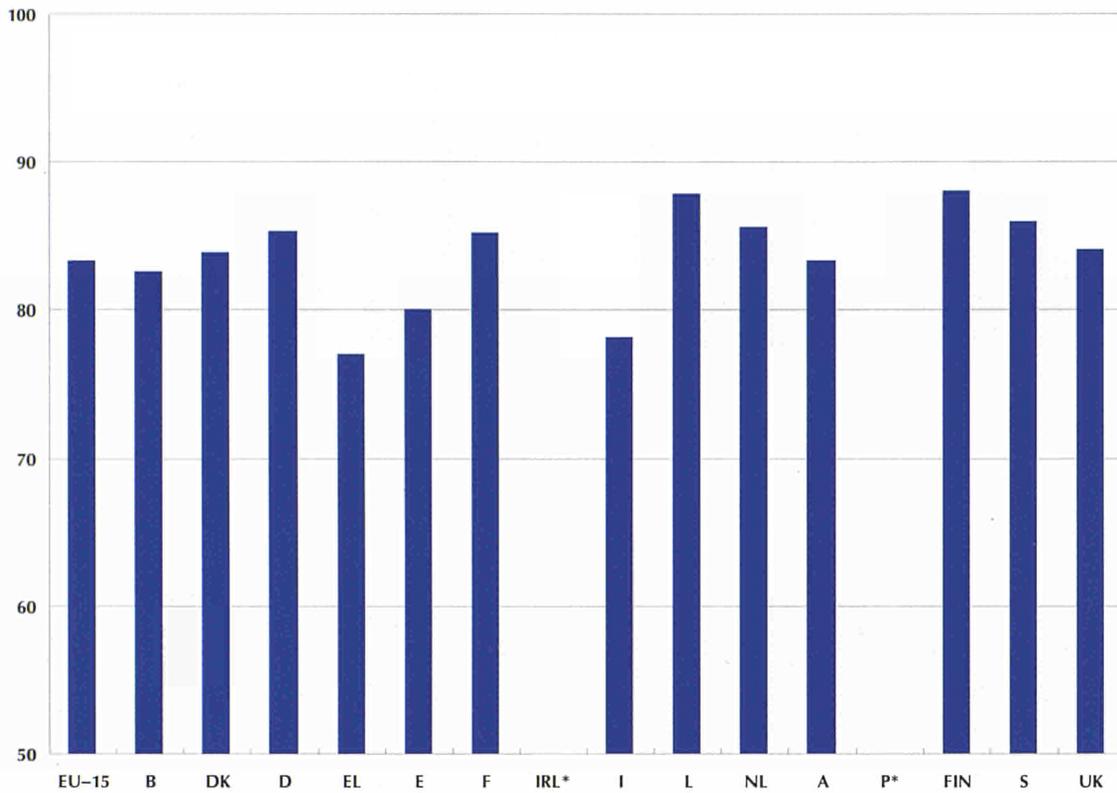
	Latest year available	no. of dwellings	Latest month available	no. of dwellings	no. of dwellings per 1,000 inhabitants	Index, 1995 = 100
EU-15		:	11-97	:	:	93.9
B	1997	50,847	12-97	7,564	0.75	201.9
DK	1997	16,711	03-98	1,660	:	172.4
D	1997	530,263	03-98	38,588	:	72.5
EL		:		:	:	:
E	1996	265,956	11-97	29,370	0.75	124.7
F	1997	299,845	04-98	23,903	:	93.0
IRL (1)	1997	37,060	12-97	:	:	119.3
I	1996	160,553	09-97	10,790	0.19	74.6
L	1996	2,797	02-97	204	0.50	91.5
NL	1997	101,501	03-98	8,305	:	101.3
A		:		:	:	:
P	1997	94,786	12-97	8,667	0.87	135.2
FIN	1997	30,913	01-98	1,556	:	102.3
S	1997	11,506	03-98	704	:	:
UK (2)	1997	188,900	03-98	16,500	:	118.1

1) quarterly data
2) buildings starts

Source: eurostat

Capacity utilisation rates

Figure 2.23



Capacity utilisation rates: 04-98 (%)

Source: DG II, Business Survey

Growth rate: latest month, t / t-12 (%) 07-97 10-97 01-98 04-98

Table 2.16

	Growth rate: latest month, t / t-12 (%)	07-97	10-97	01-98	04-98
EU-15	2.2	82.5	83.2	83.2	83.3
B	2.9	82.4	83.2	81.9	82.6
DK	2.3	85.0	84.0	85.4	83.9
D	2.3	84.2	84.9	84.7	85.3
EL	6.8	76.3	74.3	75.0	77.0
E	3.5	78.9	80.5	79.4	80.0
F	2.9	83.8	84.8	84.0	85.2
IRL	-0.4	73.0	74.2	76.6	:
I	2.6	77.7	77.7	79.0	78.2
L	6.3	84.5	84.8	87.5	87.9
NL	2.1	84.9	85.2	85.3	85.6
A	3.2	83.5	84.0	83.1	83.3
P	-1.1	80.2	81.9	80.5	:
FIN	1.3	87.0	89.0	89.0	88.0
S	2.4	87.0	85.0	87.0	86.0
UK	0.7	83.8	85.1	84.7	84.1

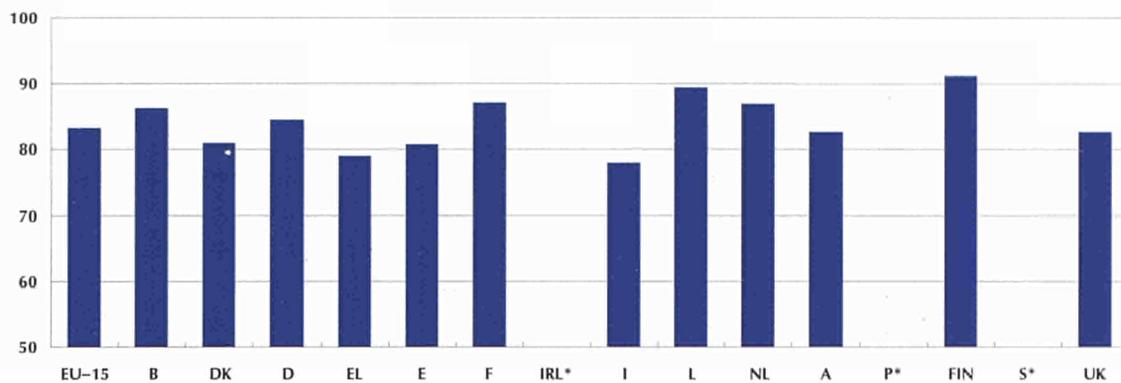
Capacity utilisation rates (%)

Source: DG II, Business Survey

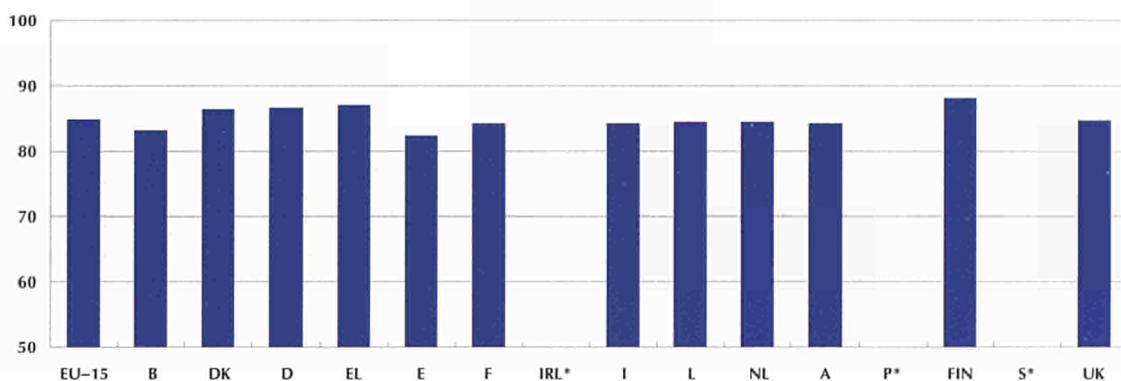
Figure 2.24

Capacity utilisation rates for the main industrial groupings, 04-98 (%)

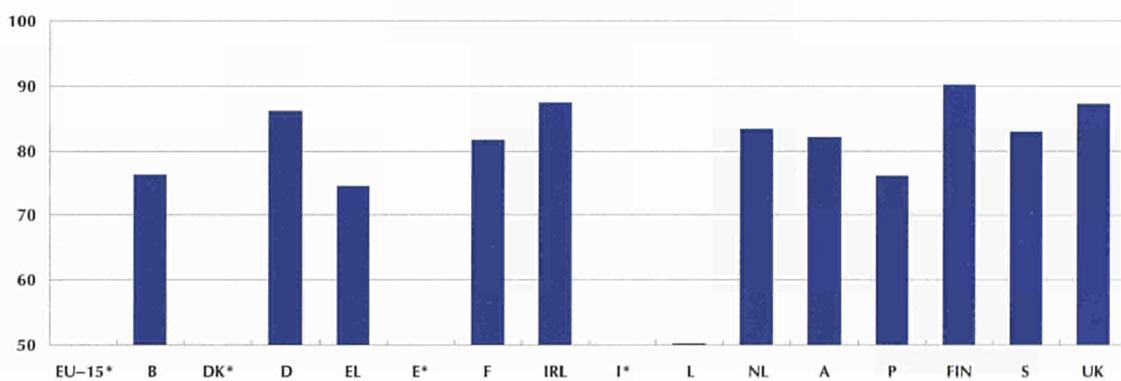
Intermediate goods



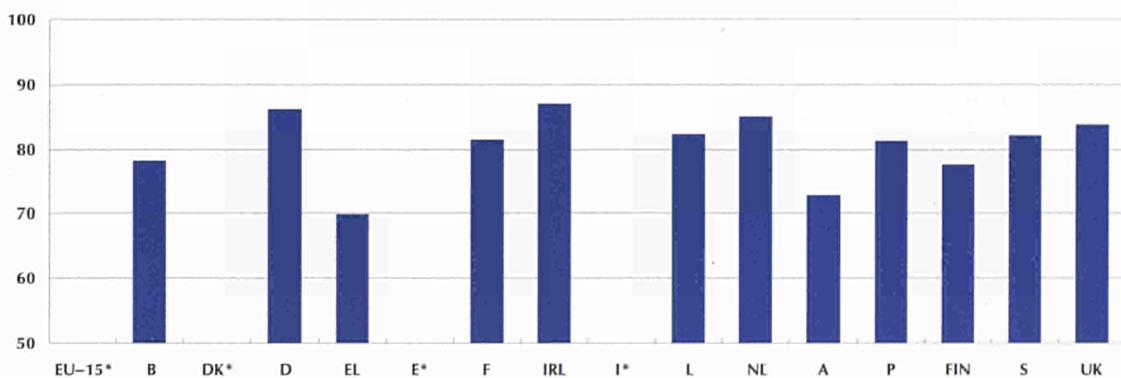
Capital goods



Consumer durables goods¹



Consumer non-durables goods¹



1) data is for 04-97

Source: DG II, Business Survey

Foreign trade indices

EU-15

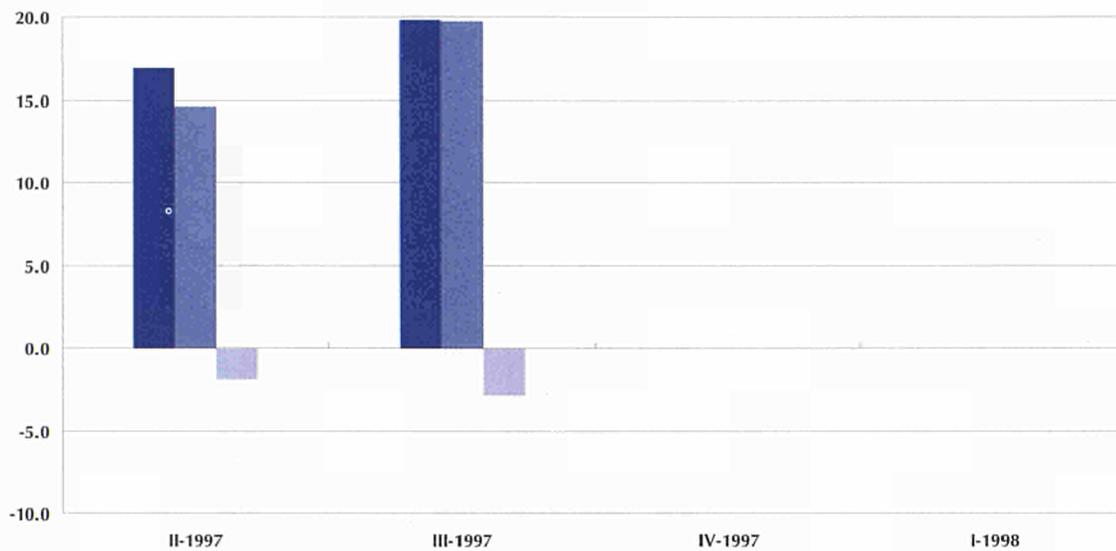
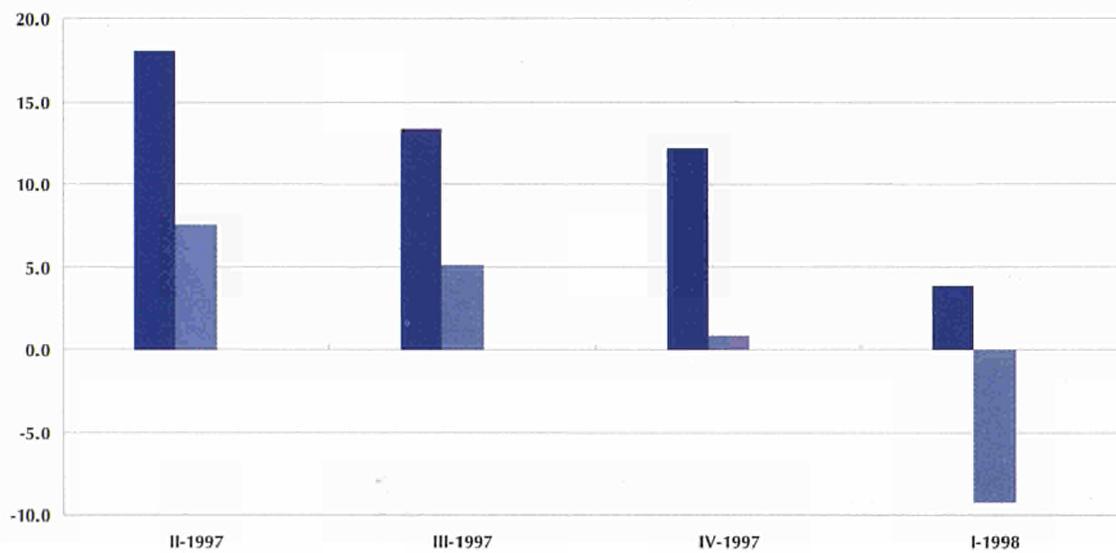


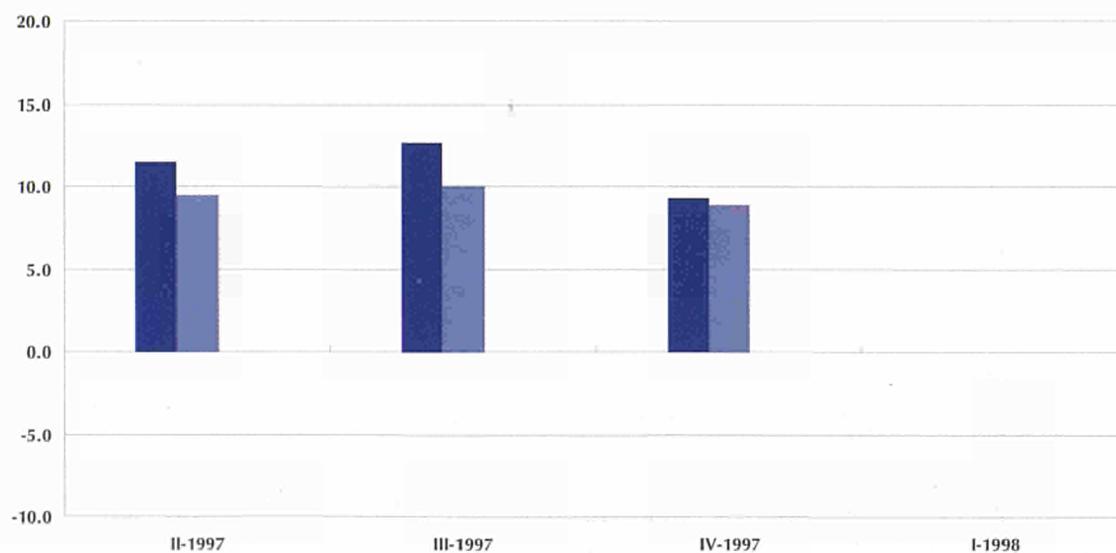
Figure 2.25

Foreign trade indices: growth rate, three months compared to the same three months of the previous year (%)

Japan



USA



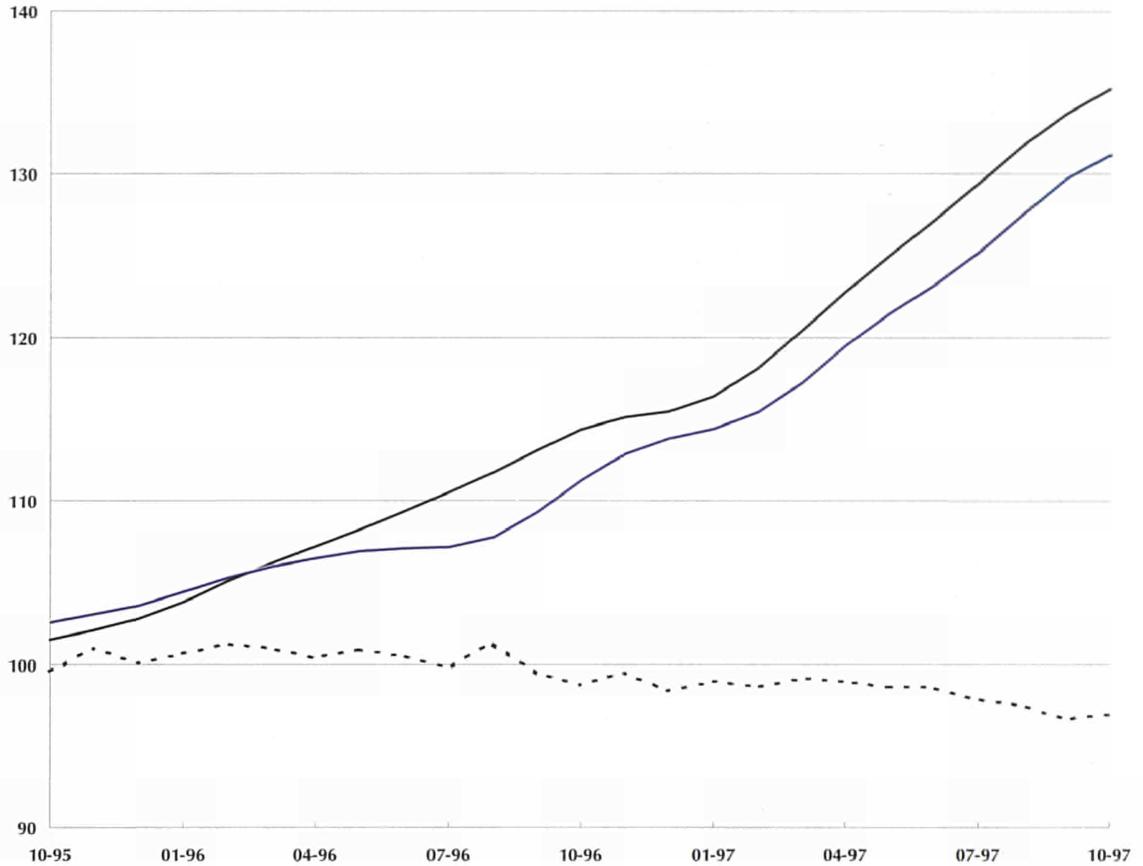
- Export value
- Import value
- Terms of trade

Source:  eurostat

Figure 2.26

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

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



Source: eurostat

Table 2.17

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

	Latest 3 months available			Exports		Imports		Terms of trade
	Value	Volume	Value	Volume	Value	Volume		
EU-15	08-97	⇒	10-97	5.0	3.1	5.0	2.3	-1.4
B/L	09-97	⇒	11-97	2.2	1.2	2.5	1.2	-0.5
DK	09-97	⇒	11-97	1.7	0.9	5.3	0.4	1.2
D	07-97	⇒	09-97	2.8	1.9	3.7	1.4	-0.8
EL	07-97	⇒	09-97	1.9	1.3	4.3	-2.2	-0.2
E	09-97	⇒	11-97	3.9	2.0	6.5	5.6	1.2
F	09-97	⇒	11-97	3.2	1.9	3.2	1.5	-0.4
IRL	08-97	⇒	10-97	7.3	5.7	4.1	3.0	1.5
I	08-97	⇒	10-97	3.6	1.7	5.0	3.2	-1.2
NL	08-97	⇒	10-97	2.1	0.9	:	-2.8	0.2
A		⇒		:	:	:	:	:
P	08-97	⇒	10-97	3.0	0.9	2.8	0.9	-0.9
FIN		⇒		:	:	:	:	:
S		⇒		:	:	:	:	:
UK	09-97	⇒	11-97	0.0	-0.3	0.4	0.8	0.9

Source: eurostat

Foreign trade indices

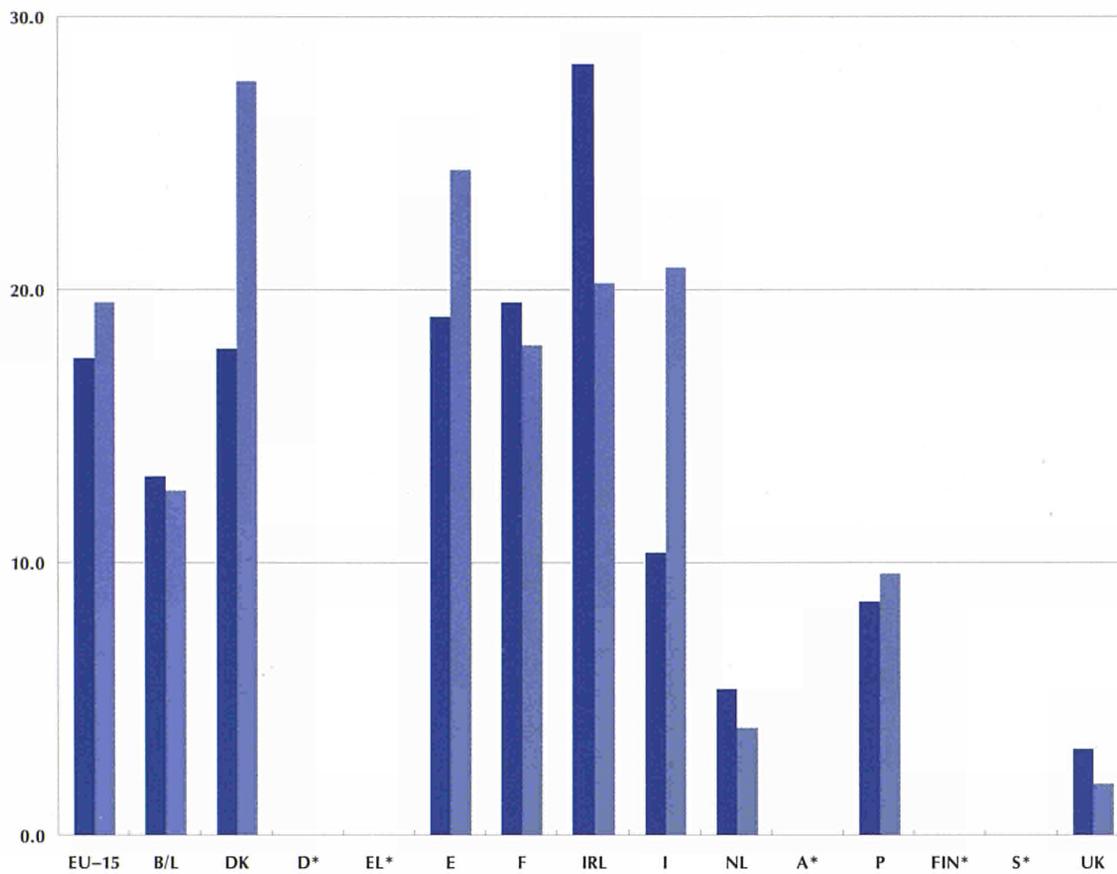


Figure 2.27

Foreign trade indices (in ECU terms): growth rate, three months compared to the same three months of the previous year, 08-97 to 10-97 (%)

■ Export value
■ Import value

Source: eurostat

	Latest 3 months available			Exports		Imports		Terms of trade
	Value	Volume	Value	Volume	Value	Volume		
EU-15	08-97	⇒	10-97	17.5	11.0	19.6	9.8	-2.8
B/L	09-97	⇒	11-97	3.8	-1.5	6.7	0.5	-0.8
DK	09-97	⇒	11-97	12.4	5.0	24.4	14.4	-1.5
D	07-97	⇒	09-97	13.0	8.5	14.2	7.3	-2.1
EL	07-97	⇒	09-97	6.5	-0.5	12.2	-1.5	-6.2
E	09-97	⇒	11-97	17.2	14.1	23.8	16.9	-2.9
F	09-97	⇒	11-97	18.1	14.0	14.6	8.6	-1.9
IRL	08-97	⇒	10-97	28.3	31.3	20.2	17.1	-5.3
I	08-97	⇒	10-97	10.4	7.1	20.8	16.4	-0.8
NL	08-97	⇒	10-97	5.4	-5.1	3.9	-5.9	0.6
A		⇒		:	:	:	:	:
P	08-97	⇒	10-97	8.6	1.9	9.6	2.7	-0.6
FIN		⇒		:	:	:	:	:
S		⇒		:	:	:	:	:
UK	09-97	⇒	11-97	2.2	5.1	2.7	6.4	0.6

Table 2.18

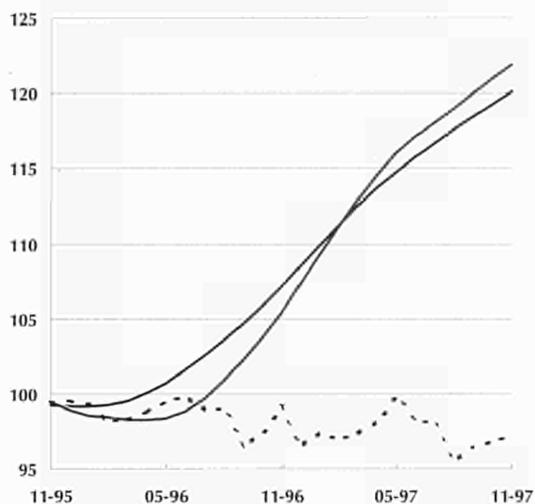
Foreign trade indices (value indices are in ECU terms): three months compared to the same three months of the previous year (%)

Source: eurostat

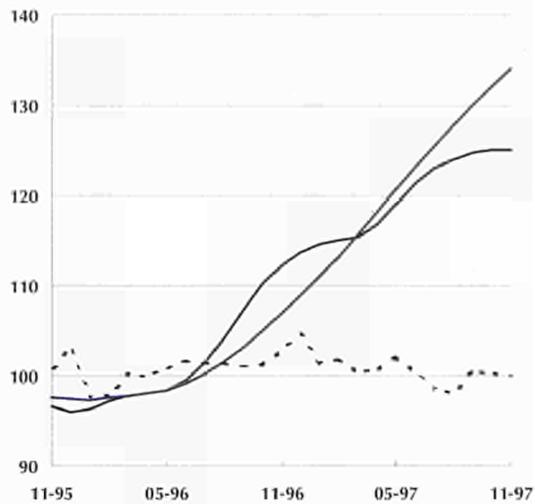
Figure 2.28

Foreign trade indices
in ECU terms
(1995 = 100)

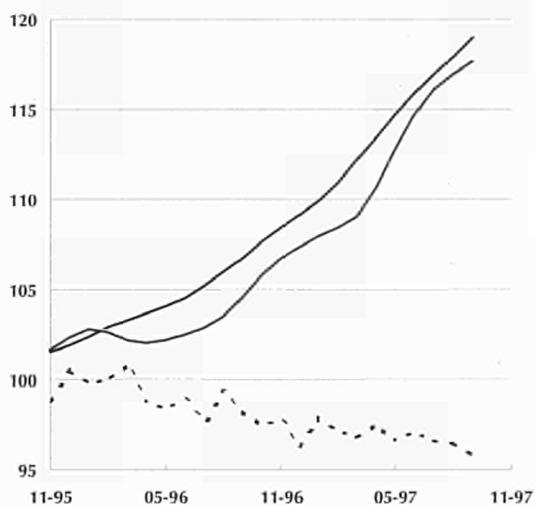
Belgique / België, Luxembourg



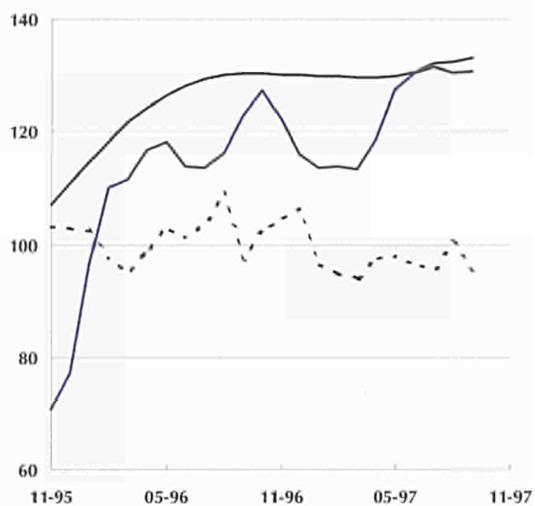
Danmark



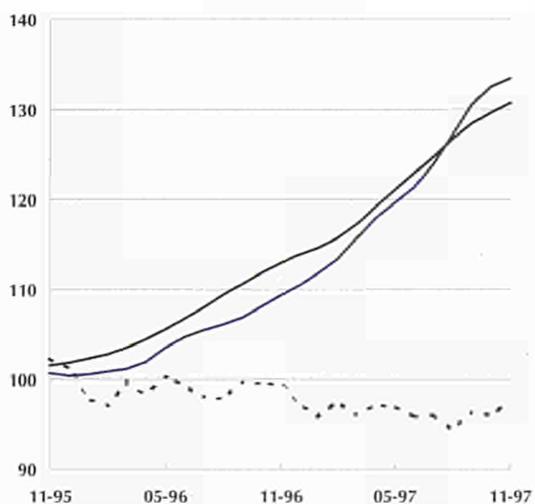
Deutschland



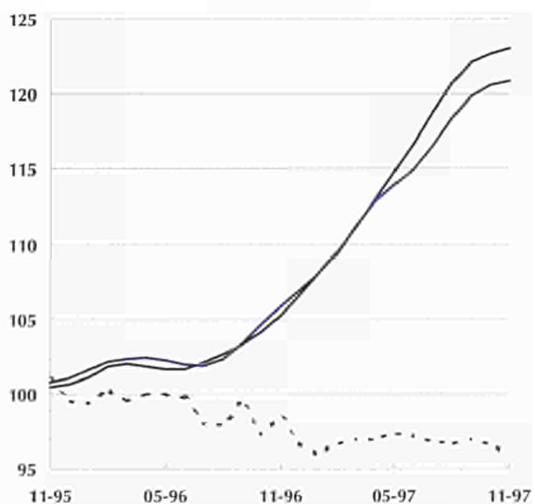
Ellada



España



France



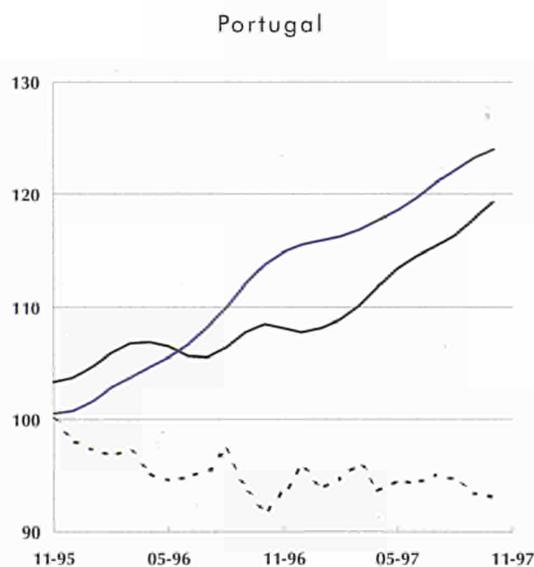
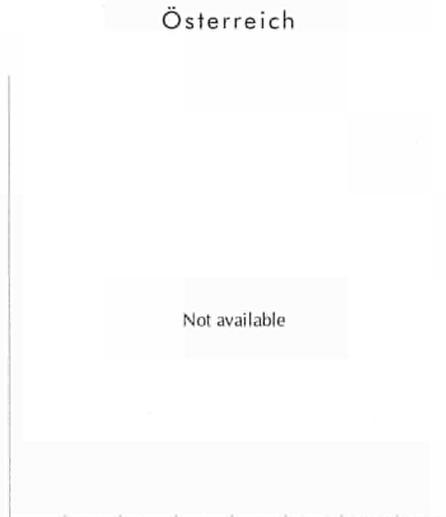
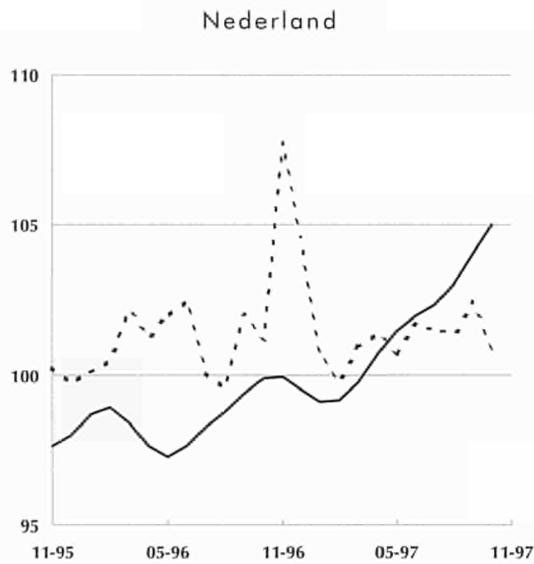
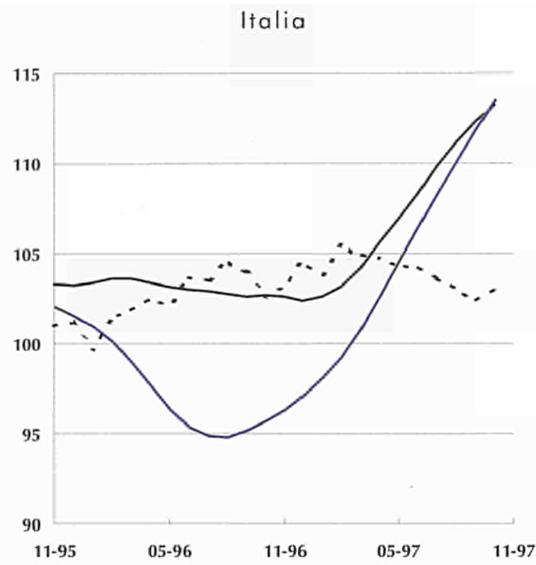
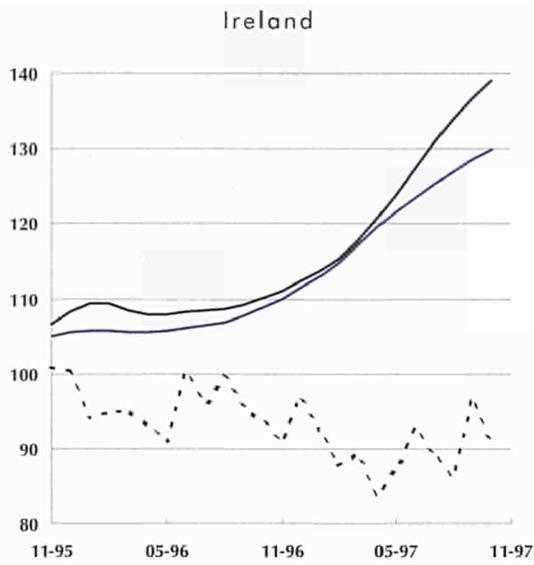
Export value index —
Import value index —
Terms of trade - - -

Source:  eurostat

Foreign trade indices (trend cycle)

Figure 2.28

Foreign trade indices
in ECU terms
(1995 = 100)



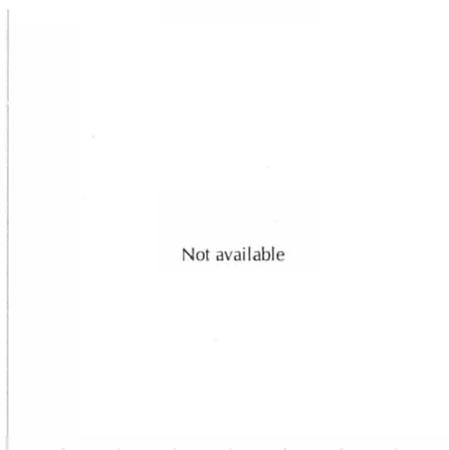
- Export value index
- Import value index
- - - Terms of trade

Source: eurostat

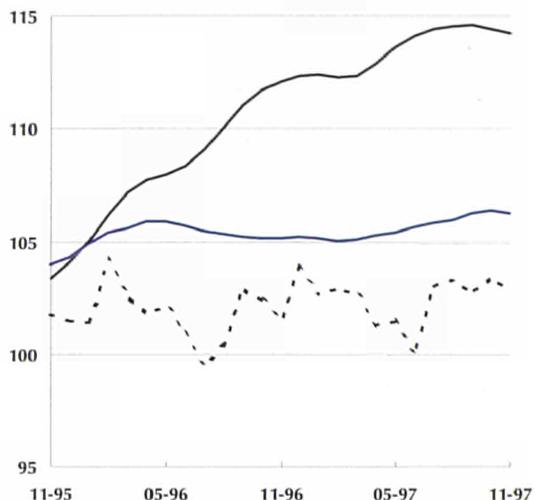
Figure 2.28

Foreign trade indices
in ECU terms
(1995 = 100)

Sverige



United Kingdom



Export value index ———

Import value index ———

Terms of trade - - - - -

Further information - employment, construction and trade indices:

Figures showing the number of persons employed include all persons employed by the firm (manual workers and salaried employees on the firm's payroll) plus the self-employed.

For the construction activity there are some very specific variables; for details of these please refer to the Eurostat publication "Methodology of Industrial Short-term Indicators" - CA-97-96-079-EN-C.

For the indices of imports and exports, foreign trade data of industrial products (following the nomenclature of the Harmonised System) were grouped according to the industrial NACE Rev.1 activity to which they belong. This grouping of products causes inevitably certain inaccuracies which can reduce the reliability of these foreign trade series. The indices for EU-15 refer only to extra-Union trade, the indices for Member States reflect also intra-Union trade.

Full methodological notes may be found on page 73.

Source: eurostat

3.

Medical, precision and optical instruments, watches and clocks

	Commentary	52
	Structural indicators	58
	value-added, production, employment and labour costs	
	External trade	60
	extra EU-15 exports and extra EU-15 imports	
	Short-term indicators	61
	production index, producer prices, capacity utilisation and foreign trade indices	



3. Medical, precision and optical instruments, watches and clocks

Description of the NACE Rev.1 groups in division 33:

- 33.1: manufacture of medical and surgical equipment and orthopaedic appliances;
- 33.2: manufacture of instruments and appliances for measuring, checking, testing, navigating and other purposes, except industrial process control equipment;
- 33.3: manufacture of industrial process control equipment;
- 33.4: manufacture of optical instruments and photographic equipment;
- 33.5: manufacture of watches and clocks



Data marked with this symbol is available on the diskette - for further details see page 72

Enquiries regarding the purchase of data should be directed to:

Eurostat Data-Shop
4, rue Alphonse Weicker
L - 2014 Luxembourg
tel: (352) 4335 2251
fax: (352) 4335 2221
e-mail: agnesn@eurostat.datashop.lu

Increase of production in France and Germany, decrease in the United Kingdom

In March 1998, the three-month on three-month growth rate of the production trend for the manufacture of clocks and watches, medical, precision and optical instruments amounted to 3.5% for EU-15. Amongst the Member States for which data is available, France experienced the best performance with a 6.5% growth rate, followed by Denmark (3.6%), Sweden (3.8%), Luxembourg (2.9%) and Germany (2.5%).

The evolution concerning the latest three-month period was however negative in a few Member States: Belgium recorded a 0.6% decrease, whilst the United Kingdom and Finland saw their respective production trends decline by 1.3% and 0.1% respectively.

Since January 1996, the three-month to three-month growth rate of the production trend for the EU has always been positive. It slowed slightly at the beginning of 1996, from 1.2% in January to 0.1% in April, before recovering during the second half to reach 1.1% by December 1996. Growth rates improved during 1997, always superior to 1.0%. The spring of 1997 was a period of growth, with an average 1.5% growth rate. June 1997 saw the start of a period of accelerating growth, from 1.7% through to 3.5% by March 1998.

The trend of the German production of precision instruments improved in 1997. Output was decreasing by 0.6% in January 1997. Since then, Germany has recorded a continuous improvement in production volume, returning to a positive evolution by April 1997 (+0.2%). By December 1997, German production growth was equal to 2.8%. At the same time, France experienced a period of expansion, with output rising at rates of between 1.0% in January 1997 and 6.9% in the winter of 1997/1998. Since February 1996, the United Kingdom production index has been in decline. June 1997 marked the point from which Spanish output has been slowing down, although the production trend continues to increase. The three-month on three-month growth rate for Spain was equal to 3.4% in June 1997, but only 0.9% by March 1998. The situation was reversed in Italy, where from a change in output of -0.3% in January 1997, growth of 1.7% was registered a year later.

Production & activity breakdown

In March 1998, EU-15

production went up by 3.5%

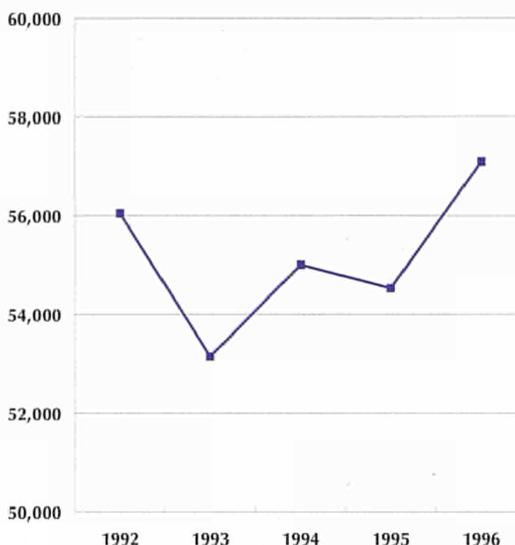


Figure 3.1

EU-15 production in constant prices (million ECU)

Source: eurostat

In March 1998 production grew by 4.6% for the branch of measuring and checking instruments and by 1.2% for the manufacture of industrial process control equipment. In the meantime, the production trend of the manufacture of optical instruments and photographic equipment grew by 2.4%, whilst for the medical and surgical equipment branch it rose 1.9% and for the manufacture of watches and clocks it was up 1.2%.

Taking account of the Member States for which data is available (i.e. excluding France, Finland and Ireland), annual changes in producer prices for the precision instruments industry amounted to 7.5% in Denmark (March 1998), 2.6% in Spain (April 1998), 1.2% in Italy (April 1998) and 0.7% in Germany (April 1998). The level of prices decreased in the United Kingdom, where the rate of change was -0.3% (May 1998).

In April 1998, producer prices grew by 1.2% in Italy and 2.6% in Spain

EU-15 producer prices (as measured by the change of one month compared to the same month of a year before) in the medical, precision and optical instruments industry equalled 0.8% in April 1998. There was a gradual tendency for price increases to slow in this industry to September 1997. Price growth decreased during 1996 and 1997 to pass under the 1.0% bar in April 1997. From January 1996 onwards, producer prices have never been above 2.0% (recorded in August 1996) and equally, they have not been lower than 0.4% (August and September 1997).

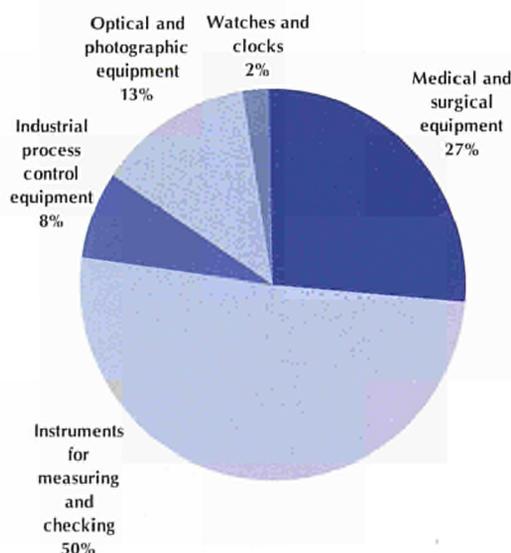


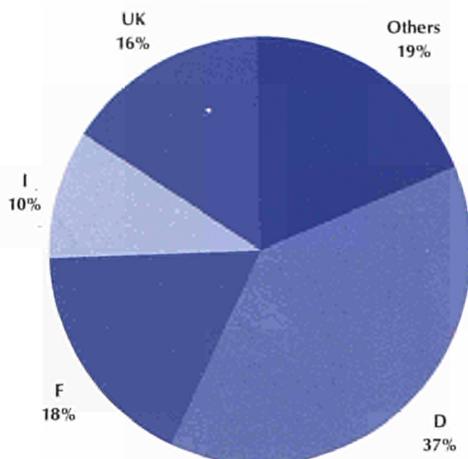
Figure 3.2

Share of production by industrial group, 1996

Source: eurostat

Figure 3.3

Share of EU-15 value-added at factor cost, 1996



Source: eurostat

Producer prices grew by 0.8%

for EU-15 in April 1998

Looking at the evolution of German producer prices from January 1997 onwards, there was a relatively homogeneous trend during 1997 (although slowing down in December to reach a rate of 1.1%). Price growth also slowed in Italy, from a rate of 2.7% in January 1997, to an annual change of 1.2% in April 1998. In the United Kingdom prices have been decreasing since April 1997. After having reached a low-point of -3.6% in October 1997, United Kingdom prices were still inferior to zero in May 1998.

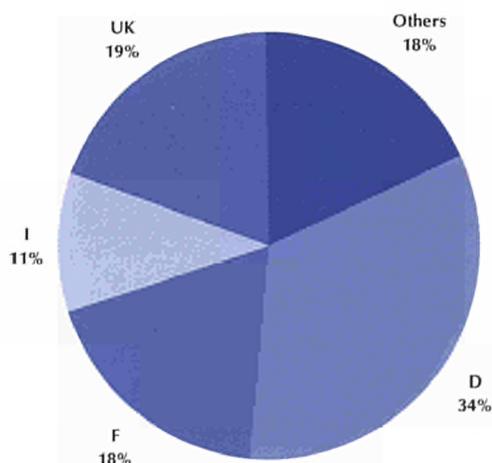
Prices grew by 0.6% for the EU-15 medical and surgical equipment branch in April 1998. The rate of change remained almost constant in the measuring and checking industry (0.2%). At the same time, producer prices grew by 1.2% for the optical instruments and photographic equipment industry and by 1.4% for the manufacture of watches and clocks.

Breakdown of the industry by activity

The manufacture of medical, precision and optical instruments, watches and clocks includes the following activities: medical equipment (27% of EU instrument engineering production in current prices in 1996); precision instruments (50%); industrial process control equipment (8%); optical instruments (13%); and watches and clocks (2%). In 1996 the industry of precision instruments covered 1.9% of total EU manufacturing production in current prices showing a small rise from a year before (1.8%). Nevertheless, the importance of this branch has been decreasing in the last ten years (the share was 2.2% in 1986). Europe holds second place after the USA (100 billion ECU) as a producer of instrument engineering with production in current prices equal to 64 billion ECU, whilst Japan's output was 42 billion ECU. Between 1990 and 1996 the share of production compared to total manufacturing production has been stable for the EU and

Figure 3.4

Share of EU-15 number of persons employed, 1996



Source: eurostat

Labour costs & production

Japan (2%) whilst in the USA it has been decreasing from 4% to 3%. The precision instruments industry, with the exception of medical and surgical equipment industry is in a mature phase of development.

A large number of specialised small niche component manufacturers

Instrument engineering production is strongly affected by the overall economic situation. Thus, it has experienced a difficult period in recent years. The industry is largely made up of small niche component manufacturers that are very specialised. Most of the employees belong to large enterprises although only a small number of companies have a portfolio of products across many subsectors. Large European firms are able to face non-EU companies, many on a global basis. If these firms lose global market share, the 99% of smaller European companies suffer knock-on effects. The instrument engineering industry, as most high technology sectors, is one that is affected by research and development expenditure.

EU production grew by 4.7% in 1996

In 1996 EU production in constant prices grew by 4.7% compared to a year before. Several European countries recorded better performance, for example, Ireland (18.4%), Finland (15.3%) and Denmark (12.2%). On the other hand Belgium, Portugal and France saw reductions of 7.2%, 4.3% and 4.2% respectively. These data are partially confirmed by growth of production in constant prices, available for the different activities: Belgium for watches and clocks (-6.8%), Portugal for optical instruments and photographic equipment (-4.5%) and France for instruments for measuring, checking and control equipment (-5.6%). For 1996, real production growth was equal to 5.9% in Japan and 2.2% in the USA. Looking at data between 1990 and 1996, Japan and Europe recorded annual average decreases of 0.8% and 0.1% respectively, whilst the USA saw annual average growth of 1.1%. In this period, the largest annual average growth rates in the EU were recorded in Ireland, Sweden and Finland (equal to 12.3%, 11.6% and 9.7% respectively). At

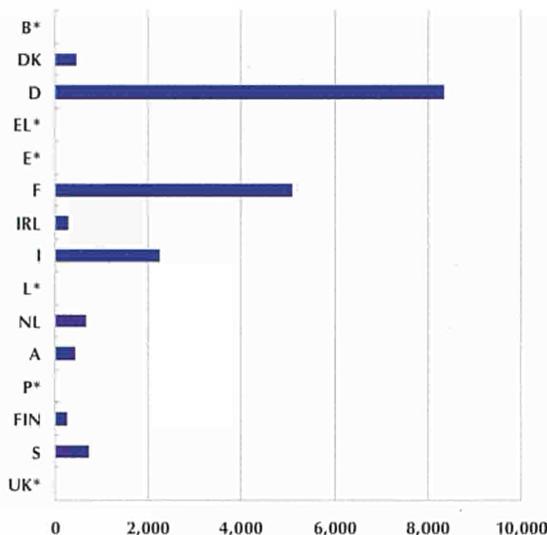


Figure 3.5

Labour costs,
1996
(million ECU)

Source: eurostat

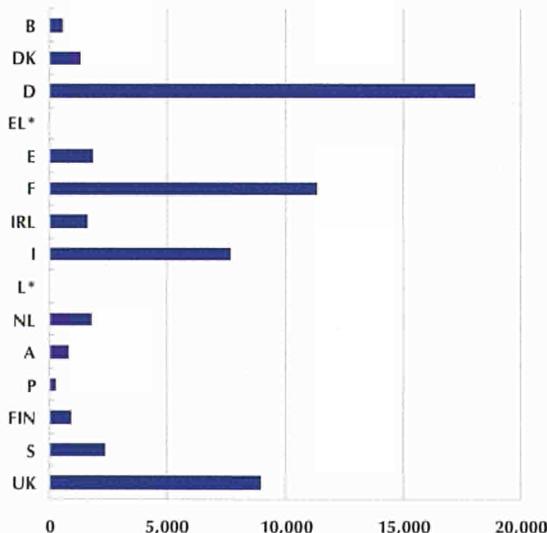


Figure 3.6

Production in
constant prices,
1996
(million ECU)

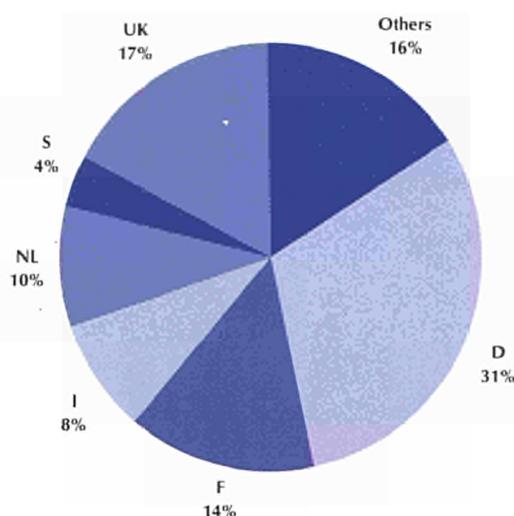
Source: eurostat

the same time France, the Netherlands and Germany had annual average reductions of 2.8%, 1.9% and 1.2%. Despite these trends, in 1996 Germany, France and the United Kingdom were still the largest European producers of instrument engineering with respective shares of 31.6%, 19.8% and 15.6% of EU production.

In 1996 the annual growth rate of production in constant prices amounted to 5.3% for medical and surgical equipment, 4.8% for instruments for measuring, checking and control equipment and 5.5% for optical instruments and photographic equipment. EU production fell by 9.1% for watches and

Figure 3.7

Share of European exports to the rest of the world, 1997



Source: eurostat

clocks. Between 1990 and 1996 the Netherlands recorded 10.1% annual average growth in medical and surgical equipment production and Italy 9% in optical instruments and photographic equipment. Meanwhile, Germany has recorded a slowdown of production for watches and clocks displayed by an average annual reduction of 11%.

Specialisation rate of Ireland is more than twice EU average

In 1996, the EU Member States relatively specialised in the manufacture of medical, precision and optical instruments, watches and clocks were Ireland (4% of manufacturing production), Denmark (2.9%) and Sweden (2.3%). Belgium and

Portugal appeared not to be specialised with a share of 0.5%. Nevertheless, France (2.2%), Germany (2.1%) and the United Kingdom (2.1%) revealed a level of specialisation higher than the EU average (1.8%).

EU employment grew in 1996

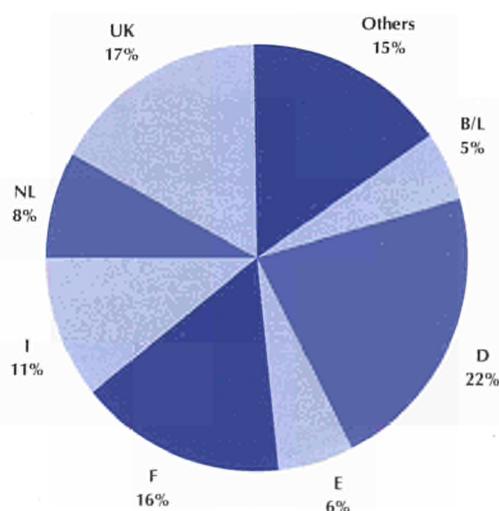
During the period 1990-1996 the EU instrument engineering industry lost around 131 thousand persons (down 16.9% compared to the 1990 level). The production of watches and clocks has recorded the largest reduction (38.3%). Over the same period, Japan and the USA saw their employment levels decline by 20.3% and 15.7% respectively. The newly industrialised Asian economies have been taking market share from Europe. On the other hand, the European industry of medical and surgical equipment has recovered around 6 thousand persons (up 3.5% compared to the 1990 level).

In 1996, 644 thousand persons were working in the manufacture of medical, precision, and optical instruments, watches and clocks, up 1% compared to the level seen a year before. Employment also rose by 1% in the USA and Japan in 1996. Spain, Ireland and Italy showed the fastest annual growth rates with the following percentage increases: 18.1%, 7.2% and 10.3%.

Amongst the EU Member States, Germany had the largest workforce with 33.3% of the European total followed by the United Kingdom (19.4%) and France (18.4%). Looking at the other members of the Triad, USA employment in instrument engineering was 14.2% more than the EU, whilst Japan employed 38.3% of the EU level.

Figure 3.8

Share of European imports from the rest of the world, 1997



Source: eurostat

This text was written by: Angelo Montani

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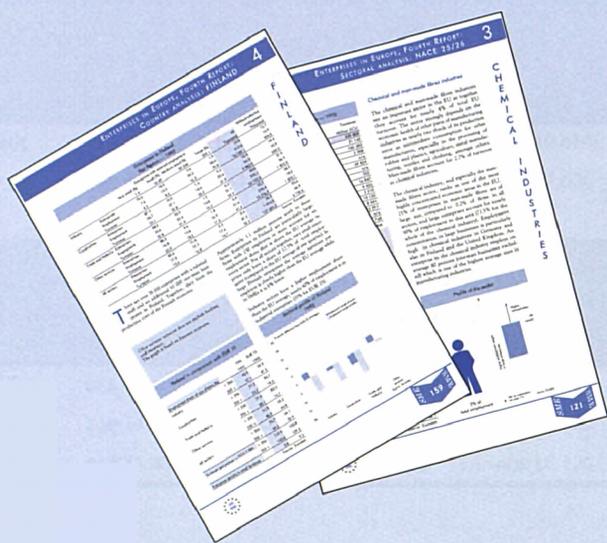
fax: (352) 42 66 40 520

e-mail: xosa091@nopc.eurostat.cec.be

**Enterprises in Europe:
fourth report**

This is a biennial publication produced by Eurostat in co-operation with DG XXIII of the European Commission.

There were around 16 million small and medium-sized enterprises (SMEs) in 1992 in the countries of EU-15, employing more than 100 million people.



The publication contains several parts which present the information that has been gathered by Eurostat. Each has been designed to facilitate the rapid acquisition of the facts. The interested reader may turn to detailed country or sectoral information. Besides this information, an update of the whole SME database will be published on CD-Rom in the first half of 1998. Eurostat Data-Shops also have the most recent data and can make user-specific extractions suited to customers' needs.

The paper publication is broken down into the following sections:

- Part 1: main information on European enterprises;
- Part 2: specific analyses, such as enterprise creation, the innovative behaviour of SMEs or regional analyses;
- Parts 3 & 4: sectoral and country analyses.

The sources used are normally existing business registers in the European countries. The following economic indicators are provided: employment, turnover and sometimes value added and labour costs.

Enquiries regarding the purchase of data should be directed to:

Eurostat Data-Shop
4, rue Alphonse Weicker
L - 2014 Luxembourg

tel: (352) 4335 2251
fax: (352) 4335 22221
e-mail: agnesn@eurostat.datashop.lu

An order form may be found at the back of this publication

Table 3.1

Value-added at
factor cost
(million ECU)

	1992 t/t-1 (%)		1993 t/t-1 (%)		1994 t/t-1 (%)		1995 t/t-1 (%)		1996 t/t-1 (%)	
EU-15	26,511	-0.1	25,887	-2.4	27,421	5.9	27,165	-0.9	29,105	7.1
EUR11	:	:	:	:	:	:	:	:	:	:
B	:	:	:	:	:	:	:	:	:	:
DK	462	11.6	486	5.3	583	19.9	581	-0.3	623	7.1
D	10,710	4.1	10,008	-6.6	10,640	6.3	10,362	-2.6	11,052	6.7
EL	:	:	:	:	:	:	:	:	:	:
E	886	5.7	734	-17.1	710	-3.3	728	2.6	740	1.7
F	4,804	-4.2	4,856	1.1	5,206	7.2	5,345	2.7	5,124	-4.1
IRL	534	13.2	669	25.3	744	11.3	831	11.7	1,011	21.6
I	2,428	-16.6	2,399	-1.2	2,440	1.7	2,349	-3.7	2,892	23.1
L	:	:	:	:	:	:	:	:	:	:
NL	885	8.5	943	6.5	817	-13.3	778	-4.8	859	10.4
A	:	:	:	:	:	:	:	:	:	:
P	87	11.6	81	-7.8	88	8.9	94	7.5	94	-0.1
FIN	247	-5.7	246	-0.4	285	16.1	370	29.8	430	16.1
S	663	13.5	621	-6.3	831	33.8	831	0.0	965	16.1
UK	4,165	-2.7	4,209	1.1	4,409	4.8	4,129	-6.4	4,588	11.1

Source:  eurostat

Table 3.2

Production in
constant prices
(million ECU)

	1992 t/t-1 (%)		1993 t/t-1 (%)		1994 t/t-1 (%)		1995 t/t-1 (%)		1996 t/t-1 (%)	
EU-15	56,039	-3.7	53,139	-5.2	55,000	3.5	54,518	-0.9	57,061	4.7
EUR11	:	:	:	:	:	:	:	:	:	:
B	434	3.1	392	-9.6	511	30.2	562	10.1	522	-7.2
DK	843	0.8	883	4.7	1,101	24.7	1,125	2.2	1,263	12.2
D	20,247	-0.7	17,405	-14.0	18,441	5.9	16,951	-8.1	18,048	6.5
EL	:	:	:	:	:	:	:	:	:	:
E	1,942	7.2	1,784	-8.1	1,839	3.1	1,830	-0.5	1,776	-3.0
F	12,885	-5.5	11,357	-11.9	11,427	0.6	11,817	3.4	11,322	-4.2
IRL	884	8.2	1,067	20.7	1,142	7.1	1,301	13.9	1,541	18.4
I	5,590	-22.0	6,352	13.6	6,687	5.3	6,925	3.6	7,668	10.7
L	:	:	:	:	:	:	:	:	:	:
NL	2,027	-0.8	2,121	4.6	1,700	-19.8	1,569	-7.7	1,747	11.3
A	812	8.4	758	-6.6	741	-2.3	782	5.5	757	-3.2
P	221	10.3	212	-4.0	235	10.7	240	2.0	229	-4.3
FIN	527	2.9	616	17.0	672	9.0	776	15.4	895	15.3
S	1,243	13.4	1,470	18.3	2,029	38.1	2,186	7.7	2,312	5.8
UK	8,318	-1.2	8,658	4.1	8,412	-2.8	8,380	-0.4	8,899	6.2

Source:  eurostat

Number of persons employed & labour costs

Table 3.3

	1992 t/t-1 (%)		1993 t/t-1 (%)		1994 t/t-1 (%)		1995 t/t-1 (%)		1996 t/t-1 (%)	
EU-15	737,830	-3.5	687,628	-6.8	663,881	-3.5	638,041	-3.9	644,230	1.0
EUR11	:	:	:	:	:	:	:	:	:	:
B	11,631	3.3	10,543	-9.4	10,217	-3.1	10,413	1.9	10,438	0.2
DK	11,429	-4.8	11,496	0.6	12,237	6.4	12,248	0.1	:	:
D	295,176	-2.4	264,657	-10.3	255,064	-3.6	219,139	-14.1	214,438	-2.1
EL	:	:	:	:	:	:	:	:	:	:
E	30,359	-2.6	24,438	-19.5	22,185	-9.2	16,354	-26.3	19,309	18.1
F	129,333	-1.1	120,091	-7.1	118,670	-1.2	119,036	0.3	118,348	-0.6
IRL	9,772	3.1	10,300	5.4	10,884	5.7	12,133	11.5	13,010	7.2
I	54,518	-18.5	57,181	4.9	57,026	-0.3	64,264	12.7	70,910	10.3
L	:	:	:	:	:	:	:	:	:	:
NL	21,826	-0.9	21,118	-3.2	19,699	-6.7	19,493	-1.0	20,062	2.9
A	11,651	5.0	10,699	-8.2	10,349	-3.3	10,802	4.4	8,327	-22.9
P	5,627	1.1	5,163	-8.2	5,251	1.7	5,565	6.0	5,440	-2.2
FIN	5,135	-8.7	5,148	0.3	5,746	11.6	6,206	8.0	:	:
S	14,039	6.2	14,403	2.6	16,320	13.3	17,761	8.8	18,047	1.6
UK	135,430	-3.8	130,749	-3.5	118,226	-9.6	122,523	3.6	124,919	2.0

Number of persons
employed
(units)

Source:  eurostat

Table 3.4

	1992 t/t-1 (%)		1993 t/t-1 (%)		1994 t/t-1 (%)		1995 t/t-1 (%)		1996 t/t-1 (%)	
EU-15	22,285	2.4	21,720	-2.5	21,758	0.2	21,416	-1.6	:	:
EUR11	:	:	:	:	:	:	:	:	:	:
B	:	:	:	:	:	:	:	:	:	:
DK	354	2.3	362	2.1	403	11.4	430	6.5	436	1.4
D	9,369	6.9	9,170	-2.1	9,361	2.1	8,544	-8.7	8,317	-2.7
EL	:	:	:	:	:	:	:	:	:	:
E	695	5.9	530	-23.8	470	-11.3	357	-23.9	:	:
F	4,792	5.5	4,707	-1.8	4,761	1.1	4,957	4.1	5,083	2.5
IRL	219	11.8	221	0.7	238	8.0	250	4.7	278	11.5
I	1,696	-21.0	1,688	-0.4	1,651	-2.2	1,741	5.4	2,232	28.2
L	:	:	:	:	:	:	:	:	:	:
NL	669	6.9	695	3.9	584	-15.9	628	7.5	652	3.9
A	352	15.4	360	2.3	361	0.4	402	11.3	401	-0.5
P	61	15.6	56	-9.4	57	3.1	65	12.9	:	:
FIN	145	-14.9	130	-10.5	167	28.4	210	25.4	223	6.2
S	539	11.8	454	-15.8	539	18.7	601	11.5	708	17.8
UK	2,978	-4.6	2,943	-1.2	2,755	-6.4	2,788	1.2	:	:

Labour costs
(million ECU)

Source:  eurostat

Table 3.5

1993 t/t-1 (%) 1994 t/t-1 (%) 1995 t/t-1 (%) 1996 t/t-1 (%) 1997 t/t-1 (%)

Extra-EU-15
exports
(million ECU)

	1993	t/t-1 (%)	1994	t/t-1 (%)	1995	t/t-1 (%)	1996	t/t-1 (%)	1997	t/t-1 (%)
EU-15	17,636	13.9	19,124	8.4	20,845	9.0	23,073	10.7	27,324	18.4
B/L	233	26.5	287	23.3	340	18.7	329	-3.4	364	10.9
DK	501	12.5	547	9.1	560	2.4	640	14.2	761	19.0
D	6,537	12.8	6,991	6.9	7,645	9.4	8,202	7.3	9,139	11.4
EL	12	66.7	18	46.7	23	27.8	29	28.4	41	40.8
E	318	12.5	392	23.2	306	-21.8	464	51.4	383	-17.5
F	2,721	9.1	2,951	8.4	3,195	8.3	3,251	1.7	3,949	21.5
IRL	387	56.1	338	-12.7	391	15.8	509	30.1	638	25.3
I	1,444	14.4	1,549	7.3	1,764	13.8	2,146	21.7	2,352	9.6
NL	1,079	33.4	1,233	14.3	1,318	6.9	1,497	13.6	2,076	38.7
A	397	11.4	414	4.1	556	34.5	500	-10.1	619	23.9
P	20	-1.0	21	5.6	31	47.8	24	-23.3	46	94.1
FIN	219	23.2	295	34.9	346	17.2	377	9.1	508	34.7
S	684	5.0	761	11.2	931	22.3	996	6.9	1,078	8.2
UK	3,084	12.0	3,329	7.9	3,438	3.3	4,110	19.5	5,371	30.7

Source:  eurostat

Table 3.6

1993 t/t-1 (%) 1994 t/t-1 (%) 1995 t/t-1 (%) 1996 t/t-1 (%) 1997 t/t-1 (%)

Extra EU-15
imports
(million ECU)

	1993	t/t-1 (%)	1994	t/t-1 (%)	1995	t/t-1 (%)	1996	t/t-1 (%)	1997	t/t-1 (%)
EU-15	18,104	3.0	19,512	7.8	20,409	4.6	22,410	9.8	25,367	13.2
B/L	653	20.4	667	2.0	926	38.9	988	6.7	1,119	13.2
DK	236	4.6	263	11.2	269	2.4	315	17.3	364	15.4
D	5,051	2.8	5,519	9.3	5,819	5.4	6,296	8.2	6,868	9.1
EL	155	1.8	149	-4.1	163	9.7	204	25.0	226	10.6
E	789	-25.2	815	3.3	850	4.3	924	8.8	1,065	15.3
F	2,832	6.6	3,054	7.8	3,196	4.6	3,396	6.3	3,704	9.1
IRL	206	36.0	310	50.5	318	2.4	367	15.4	549	49.8
I	1,806	-8.8	1,837	1.7	1,881	2.4	1,927	2.5	2,249	16.7
NL	1,319	-0.5	1,447	9.8	1,786	23.4	2,048	14.7	2,411	17.7
A	538	8.7	623	15.7	440	-29.4	474	7.7	502	6.0
P	152	-2.7	158	4.1	143	-10.0	160	12.0	180	12.7
FIN	197	-3.0	237	20.5	211	-11.2	231	9.6	247	6.8
S	666	3.3	738	10.8	624	-15.5	672	7.8	753	12.1
UK	3,504	13.7	3,696	5.5	3,785	2.4	4,407	16.4	5,130	16.4

Source:  eurostat

Production (trend cycle) & producer price indices

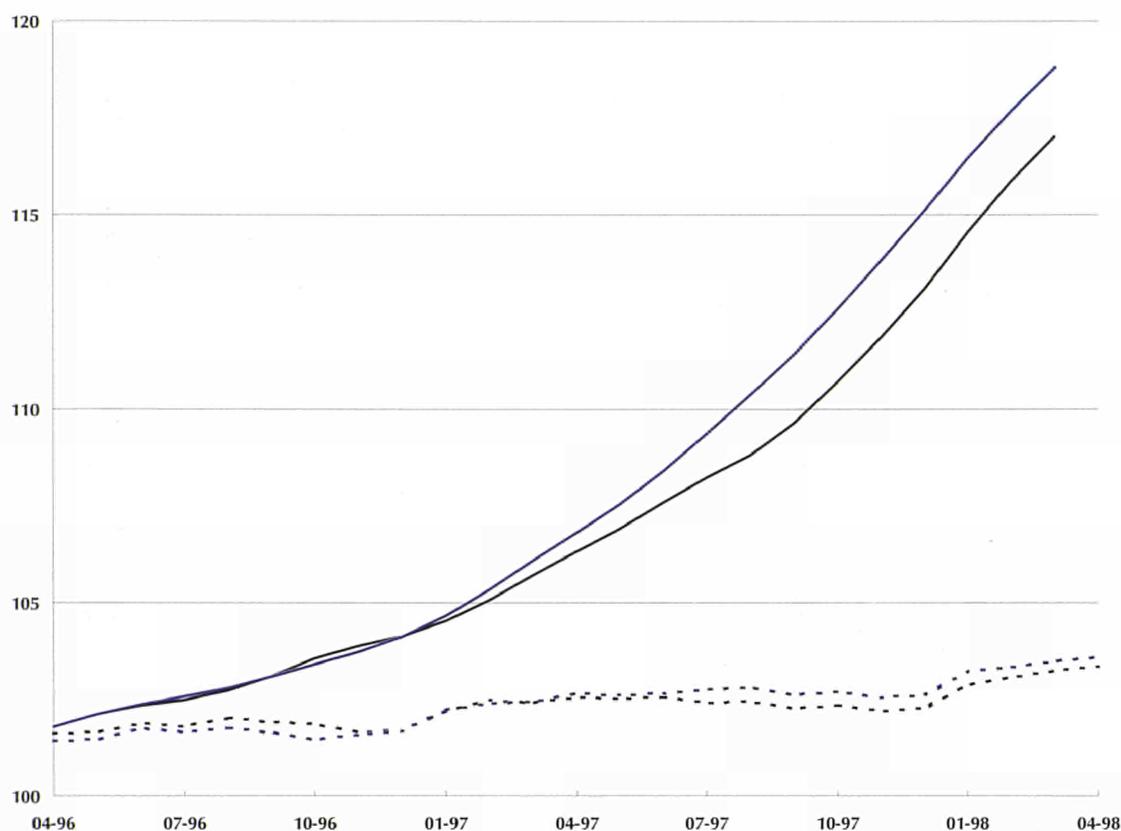


Figure 3.9

Production and
producer price
indices
(1995 = 100)

EU-15 production
—— index
EU-15 producer
----- price index
EUR11 production
—— index
EUR11 producer
----- price index

Source: eurostat

	Latest 3 months available			Production index		Latest month available	Producer price index	
	Start	End	End	t / t-1	t / t-4		t / t-3	t / t-12
EU-15	01-98	⇒	03-98	3.5	11.9	04-98	0.5	0.8
B	01-98	⇒	03-98	-0.6	14.0	02-98	0.0	0.3
DK	01-98	⇒	03-98	4.4	19.3	03-98	8.0	7.5
D	02-98	⇒	04-98	2.5	9.6	04-98	0.3	0.7
EL	01-98	⇒	03-98	-6.0	-29.1	03-98	3.9	4.9
E	01-98	⇒	03-98	0.9	9.6	04-98	0.8	2.6
F	01-98	⇒	03-98	6.5	24.9		:	:
IRL	08-97	⇒	10-97	-7.0	9.2	01-98	0.1	-0.1
I	01-98	⇒	03-98	2.4	-3.5	04-98	0.8	1.2
L	01-98	⇒	03-98	2.9	14.1		:	:
NL	10-97	⇒	12-97	1.8	12.3	02-98	0.9	1.9
A	12-97	⇒	02-98	0.7	-0.8		:	:
P		⇒		:	:		:	:
FIN	01-98	⇒	03-98	-0.1	12.1	12-97	-0.4	-1.3
S	12-97	⇒	02-98	3.8	11.8	04-98	3.5	4.3
UK	01-98	⇒	03-98	-1.3	1.3	05-98	0.6	-0.3
Japan		⇒		:	:		:	:
USA		⇒		:	:		:	:

Table 3.7

Production and producer price indices:
growth rates
(%)

Source: eurostat

Figure 3.10

Production and producer price indices: growth rate, three months compared to the same three months of the previous year, 02-98 to 04-98 (%)

Production ■
 Producer price index ■

Source: 

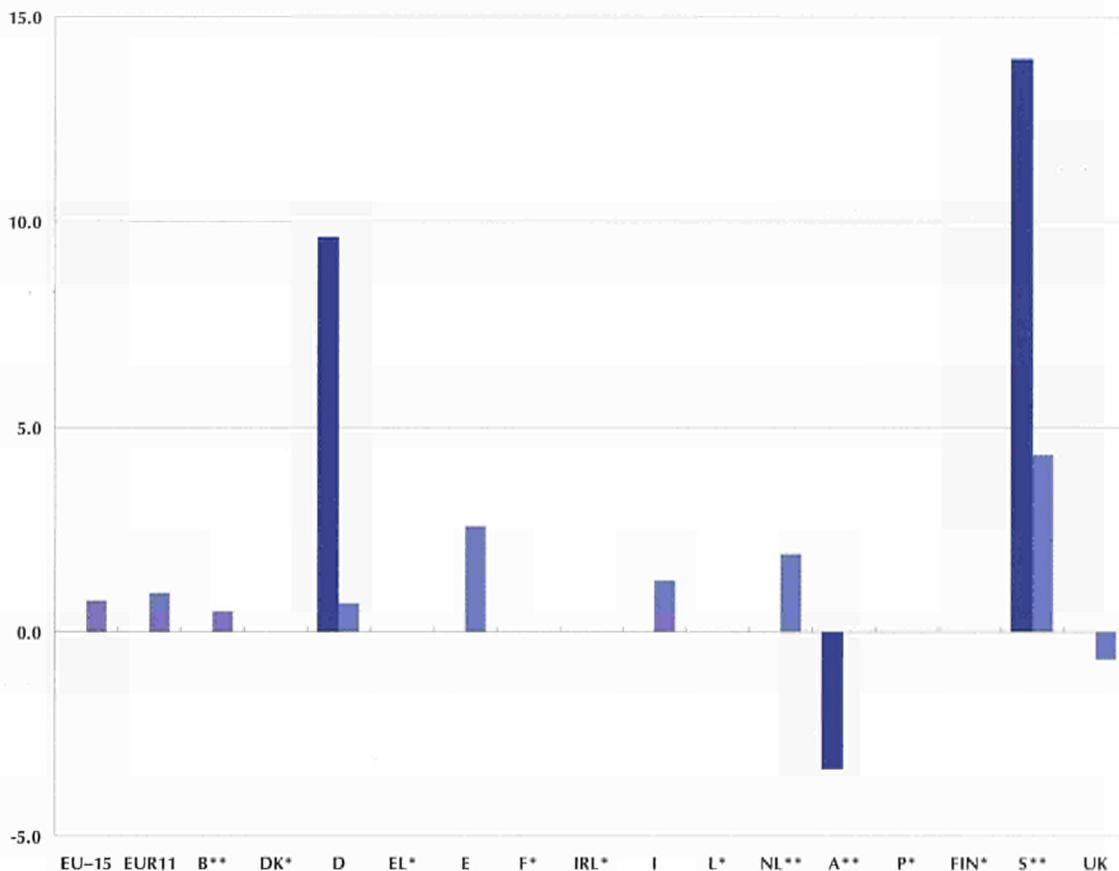
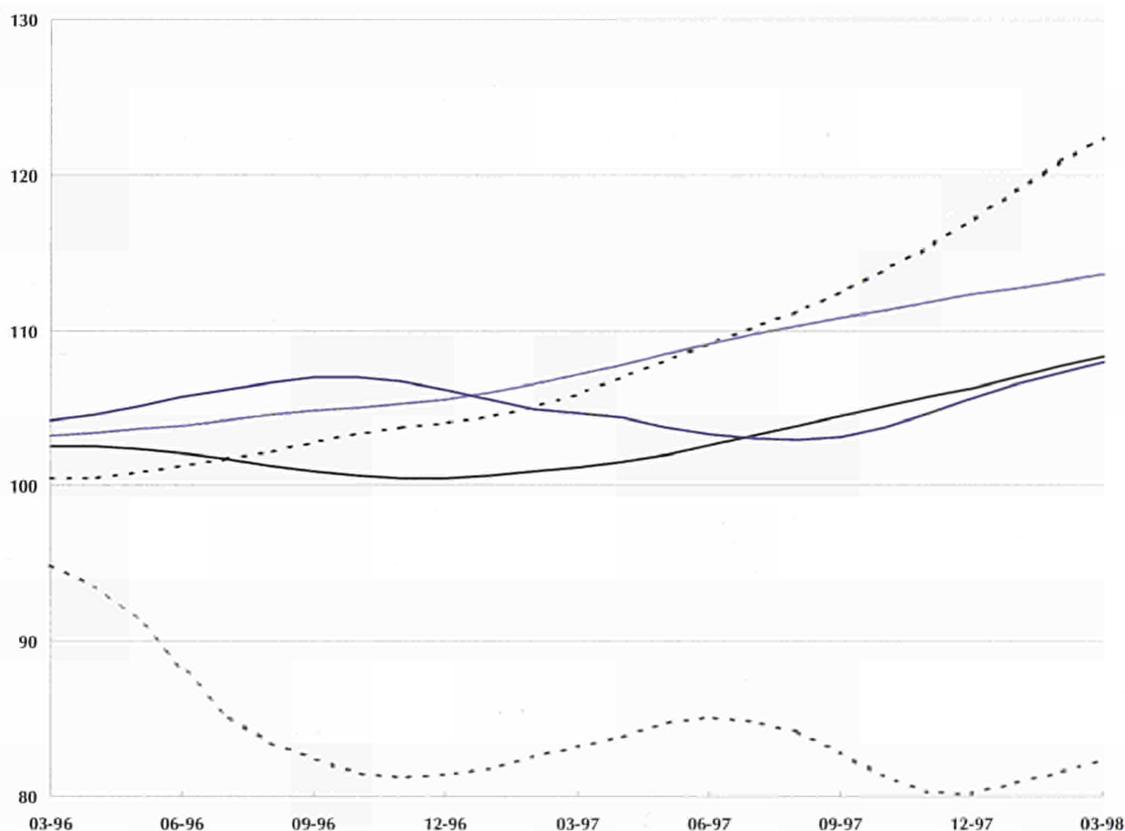


Figure 3.11

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

Medical and surgical equipment —
 Instruments for measuring and checking - - - -
 Industrial process control equipment —
 Optical and photographic equipment —
 Watches and clocks - - - -

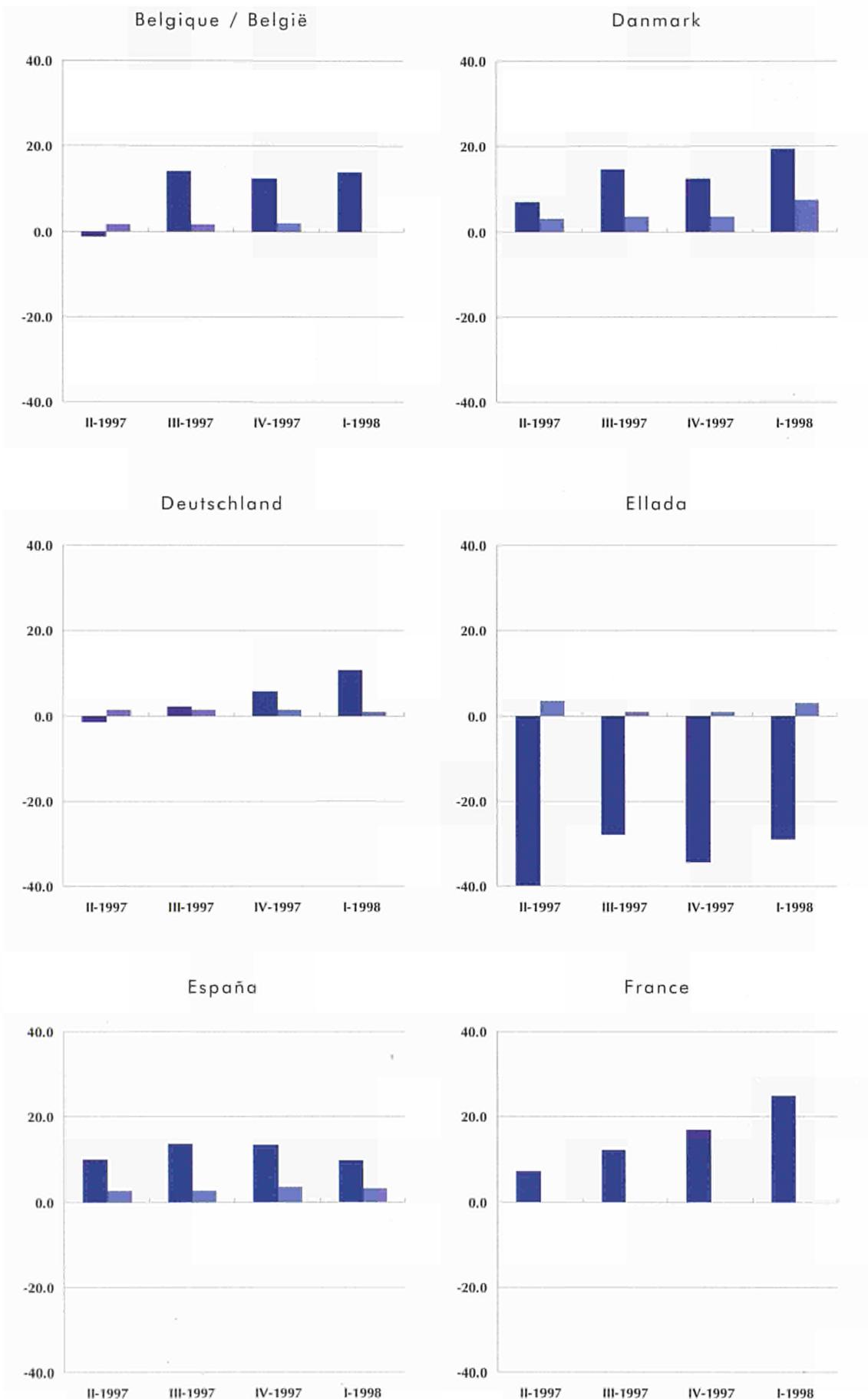
Source: 



Production & producer price indices

Figure 3.12

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

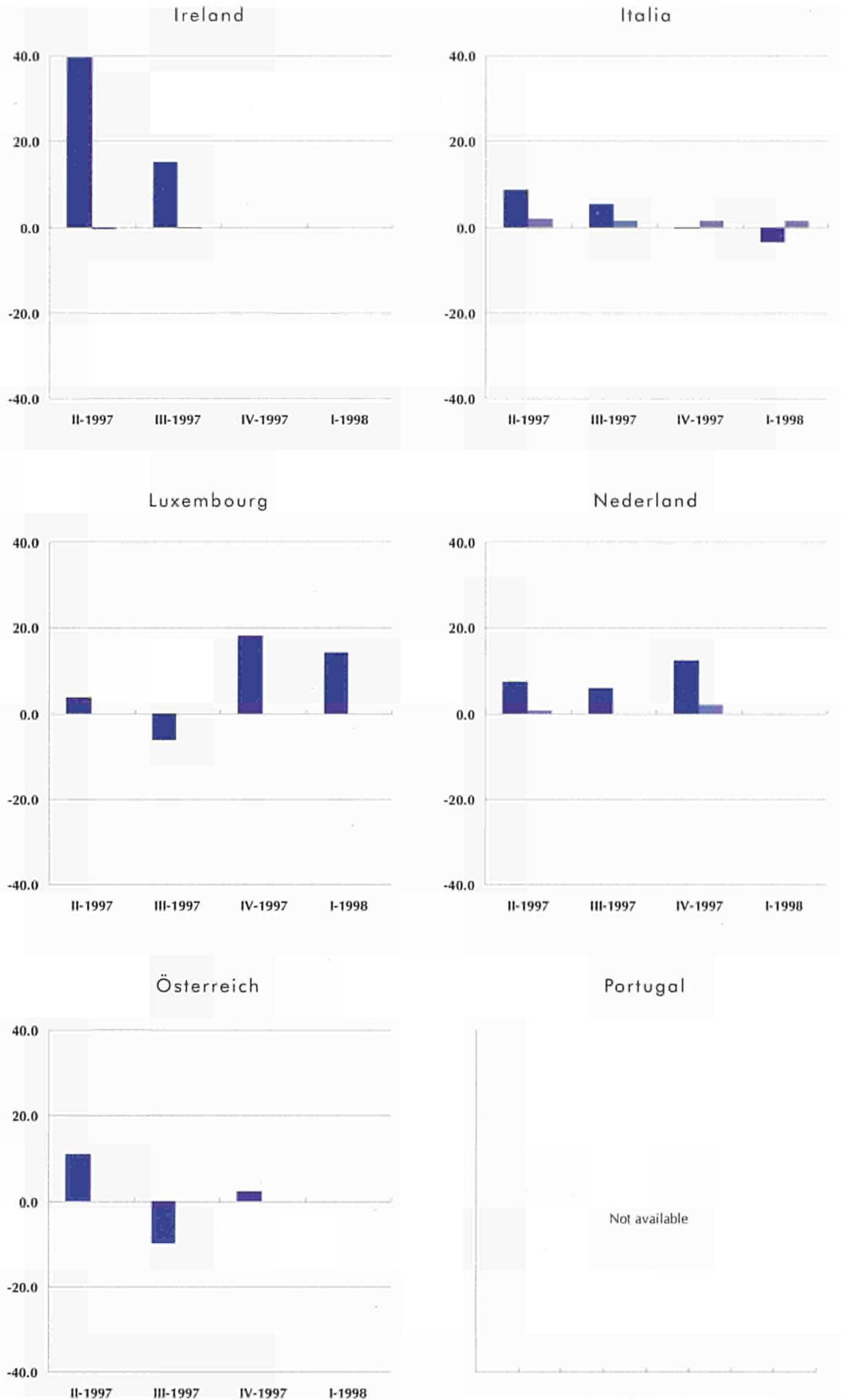


■ Production index
■ Producer price index

Source: eurostat

Figure 3.12

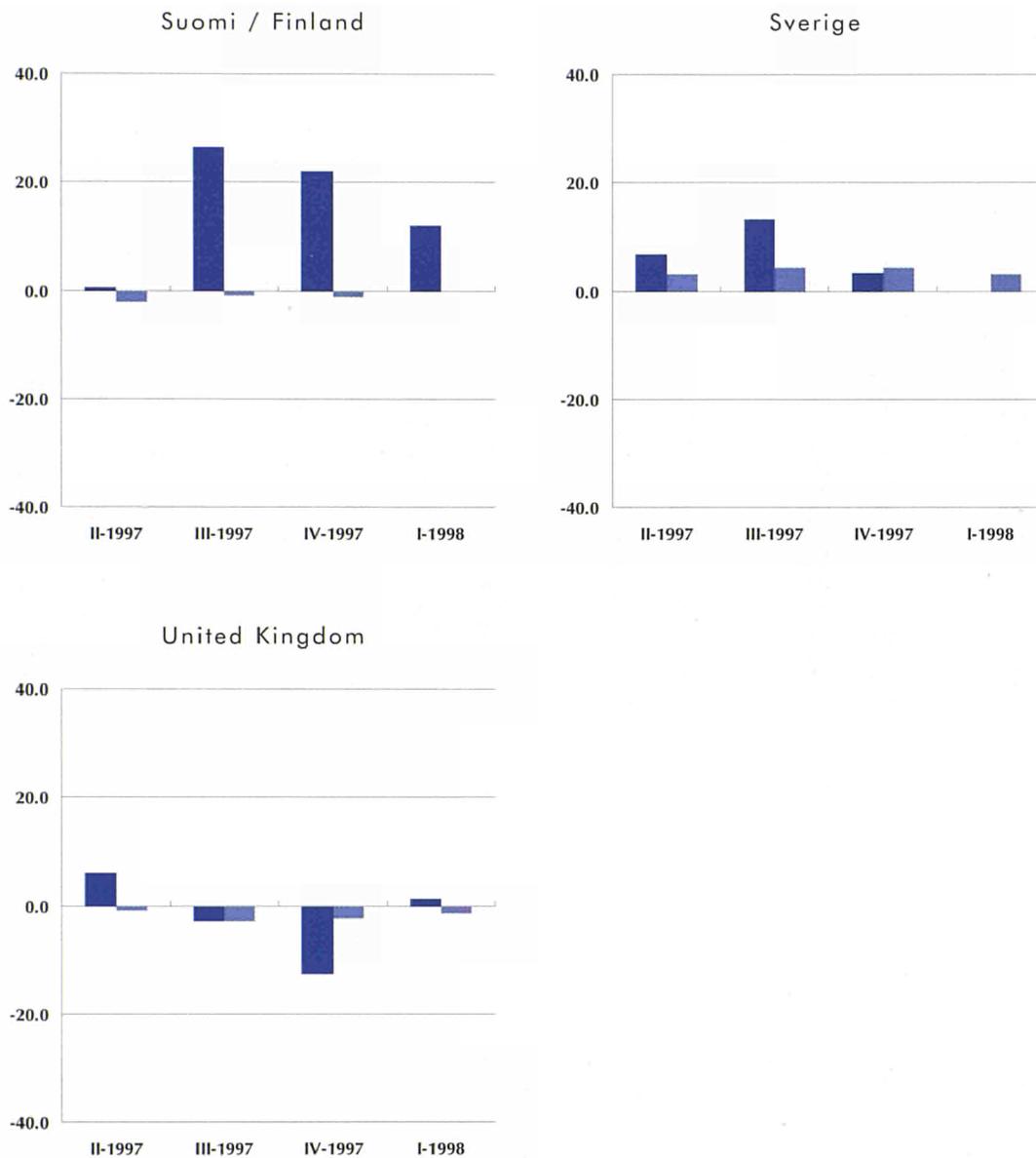
Production and producer price indices: growth rate, three months compared to the same three months of the previous year (%)



Source: eurostat

Production & producer price indices

Figure 3.12



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

■ Production index

■ Producer price index

Further information - the production and producer price indices:

The indices of production are adjusted in two stages. Firstly, account is taken of the variation in the number of working days in the month. The national Statistical Offices provide Eurostat with these series (except Denmark, France and Spain). Secondly, for EU-15 and most of the Member States a correction is made using seasonal adjustment with TRAMO / SEATS, a method developed by Professor Maravall and V. Gomez. For France, Finland, Sweden and the United Kingdom, the indices are adjusted by the national statistical offices themselves. For Germany, the trend and seasonally adjusted figures are calculated by the German NSO.

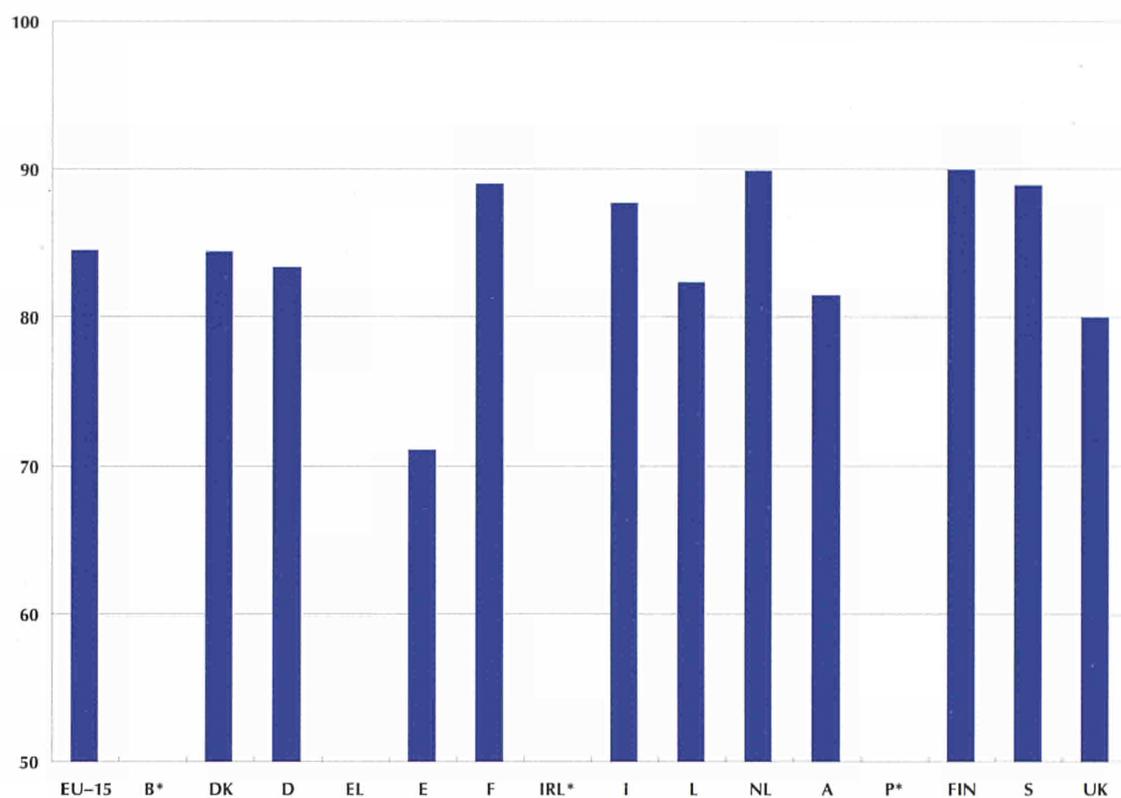
The index of producer prices shows (in the national currency of the Member State in question) changes in the ex-works selling prices of all products sold on the domestic market. Since we deal with producer prices, imports are not included in these price indices. Producer price indices are not seasonally adjusted.

Full methodological notes may be found on page 73.

Source: eurostat

Figure 3.13

Capacity
utilisation rates,
04-98
(%)



Source: DG II,
Business Survey

Table 3.8

Capacity
utilisation rates
(%)

	Growth rate: latest month, t / t-12 (%)	07-97	10-97	01-98	04-98
EU-15	1.8	83.4	84.4	83.9	84.5
B	:	:	:	:	:
DK	-0.6	87.0	87.0	85.7	84.5
D	4.6	82.2	81.1	81.7	83.4
EL	:	:	:	:	:
E	-15.4	86.5	84.7	83.2	71.1
F	9.6	84.4	87.1	86.9	89.1
IRL	9.8	82.4	74.1	79.3	:
I	1.3	87.8	91.5	85.5	87.8
L	7.7	72.4	76.5	81.5	82.4
NL	1.7	88.8	91.1	92.4	89.9
A	2.8	83.4	82.3	86.4	81.5
P	8.1	88.8	87.5	90.5	:
FIN	-2.0	93.0	94.0	94.0	90.0
S	8.5	83.0	:	88.0	89.0
UK	-10.4	81.5	84.8	83.1	80.0

Source: DG II,
Business Survey

Foreign trade indices (trend cycle)

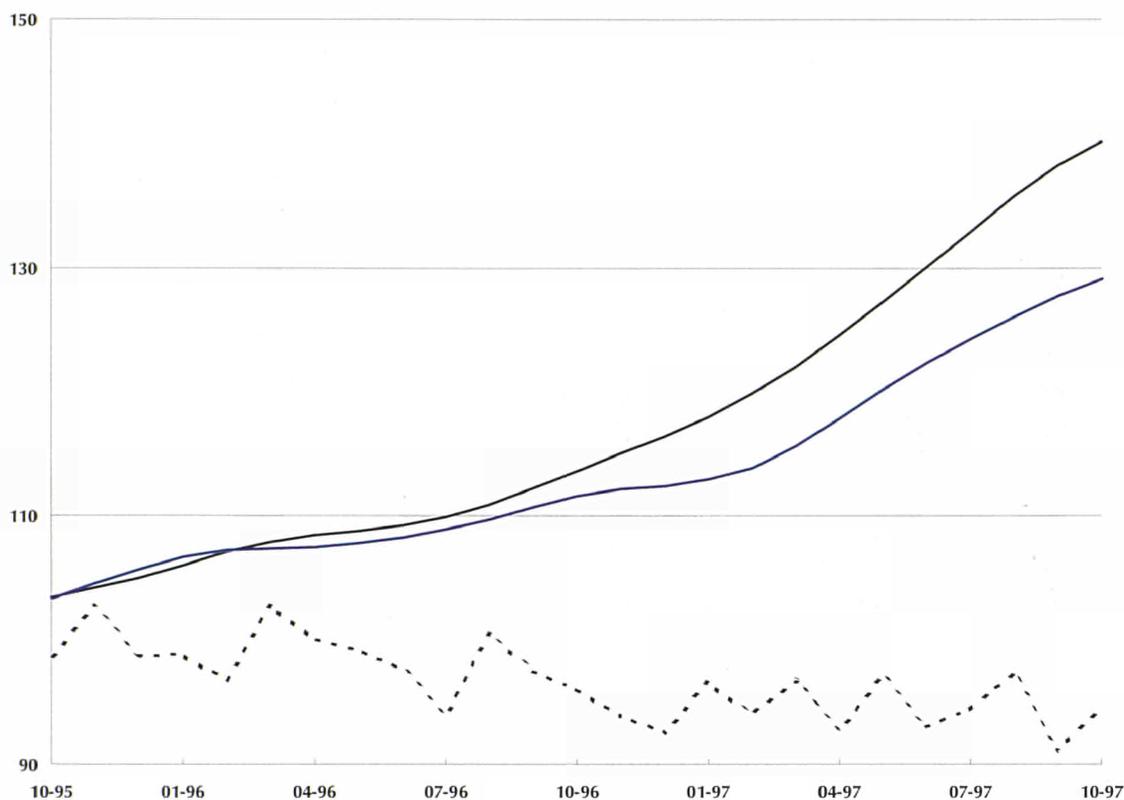


Figure 3.14

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

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

Source:  eurostat

Latest 3 months available

Exports Value Volume Imports Value Volume Terms of trade

	Latest 3 months available	Exports Value	Exports Volume	Imports Value	Imports Volume	Terms of trade
EU-15	08-97 ⇒ 10-97	6.1	3.8	4.4	1.4	-0.5
B / L	09-97 ⇒ 11-97	2.1	0.9	1.0	-3.4	-1.3
DK	09-97 ⇒ 11-97	2.9	4.1	4.7	2.3	-3.0
D	07-97 ⇒ 09-97	2.7	1.0	3.8	2.2	-0.3
EL	07-97 ⇒ 09-97	:	:	:	-5.8	:
E	09-97 ⇒ 11-97	2.0	2.0	5.4	3.6	9.6
F	09-97 ⇒ 11-97	1.5	2.9	3.3	0.5	0.1
IRL	08-97 ⇒ 10-97	3.4	0.7	5.1	2.2	0.1
I	08-97 ⇒ 10-97	1.3	0.9	3.2	2.4	5.9
NL	08-97 ⇒ 10-97	1.9	1.7	-2.0	:	-1.6
A	⇒	:	:	:	:	:
P	08-97 ⇒ 10-97	11.9	7.5	4.5	3.2	6.4
FIN	⇒	:	:	:	:	:
S	⇒	:	:	:	:	:
UK	09-97 ⇒ 11-97	1.8	0.7	2.4	1.1	-1.9

Table 3.9

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

Source:  eurostat

Figure 3.15

Foreign trade indices in ECU terms: growth rate, three months compared to the same three months of the previous year, 08-97 to 10-97 (%)

Export value ■
Import value ■

Source:  eurostat

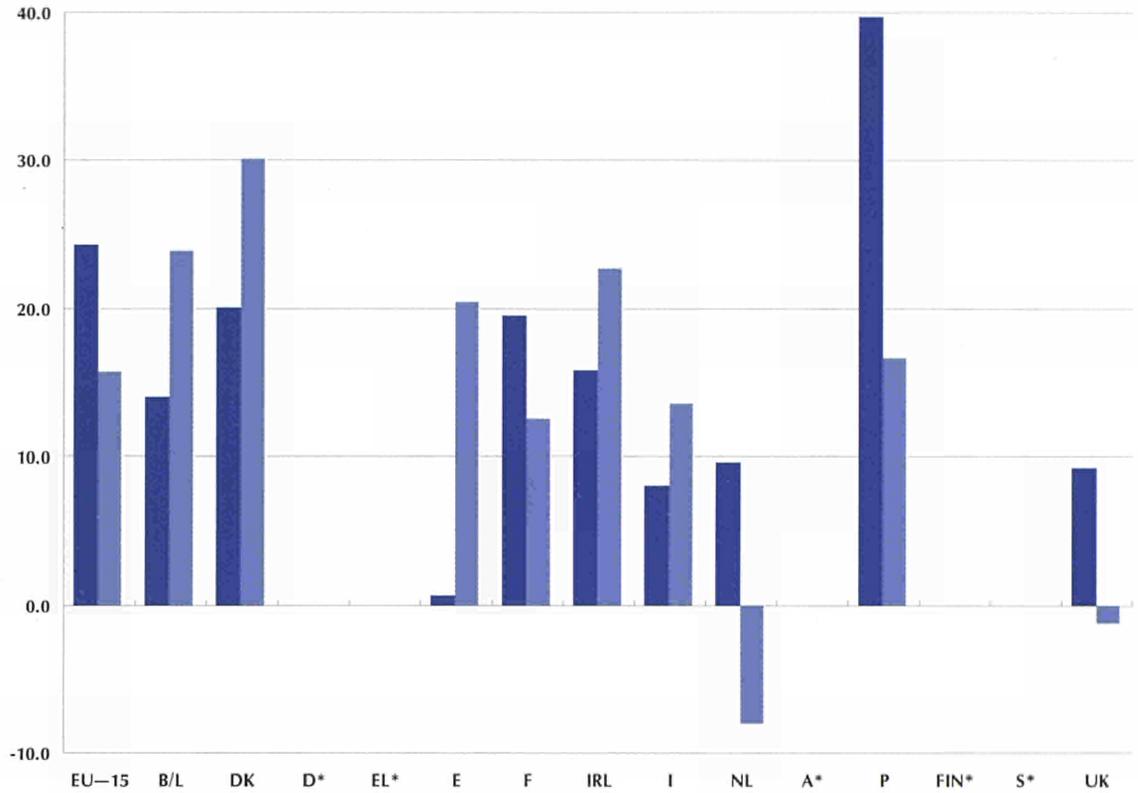


Table 3.10

Foreign trade indices (value indices are in ECU terms): growth rates (%)

Source:  eurostat

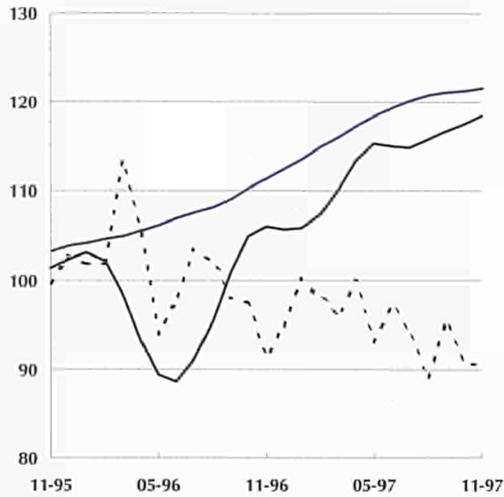
	Latest 3 months available	Exports		Imports		Terms of trade
		Value	Volume	Value	Volume	
EU-15	08-97 ⇒ 10-97	24.3	16.7	15.7	4.5	-3.8
B / L	09-97 ⇒ 11-97	9.0	6.4	12.0	5.3	-3.7
DK	09-97 ⇒ 11-97	16.2	17.6	27.2	21.8	-5.3
D	07-97 ⇒ 09-97	17.0	13.9	14.1	3.1	-7.2
EL	07-97 ⇒ 09-97	:	:	18.0	-3.7	:
E	09-97 ⇒ 11-97	-2.6	-3.3	22.3	14.7	-5.1
F	09-97 ⇒ 11-97	24.5	24.4	12.4	2.1	-8.9
IRL	08-97 ⇒ 10-97	15.8	5.8	22.7	22.7	9.6
I	08-97 ⇒ 10-97	8.1	4.0	13.6	9.6	0.3
NL	08-97 ⇒ 10-97	9.6	-3.4	-8.0	-24.8	-7.2
A	⇒	:	:	:	:	:
P	08-97 ⇒ 10-97	39.7	27.3	16.6	15.1	12.2
FIN	⇒	:	:	:	:	:
S	⇒	:	:	:	:	:
UK	09-97 ⇒ 11-97	9.0	5.5	2.9	1.4	1.5

Foreign trade indices (trend cycle)

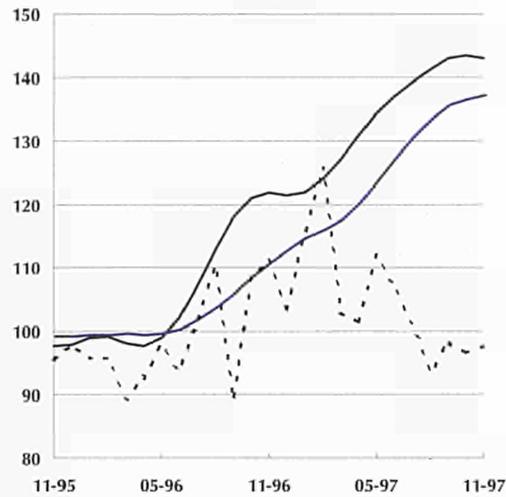
Figure 3.16

Foreign trade indices
in ECU terms
(1995 = 100)

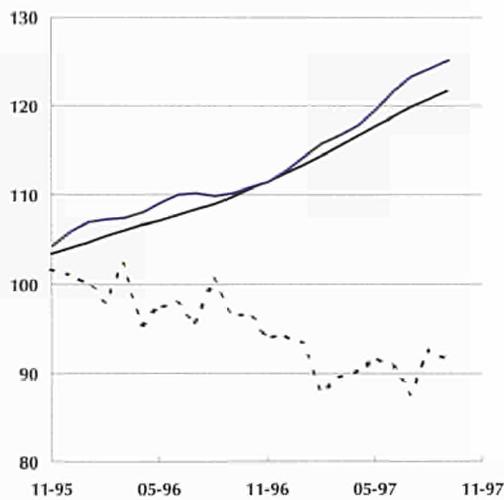
Belgique / België, Luxembourg



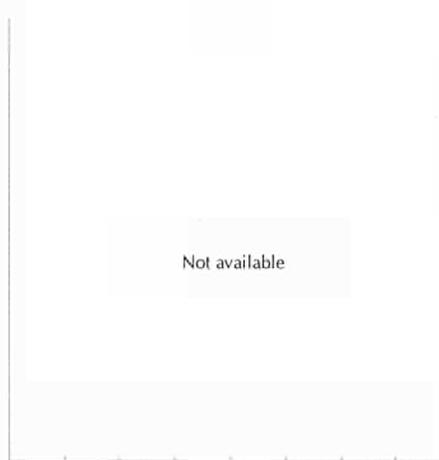
Danmark



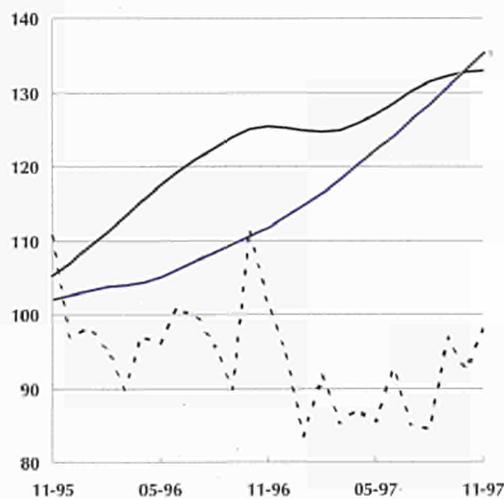
Deutschland



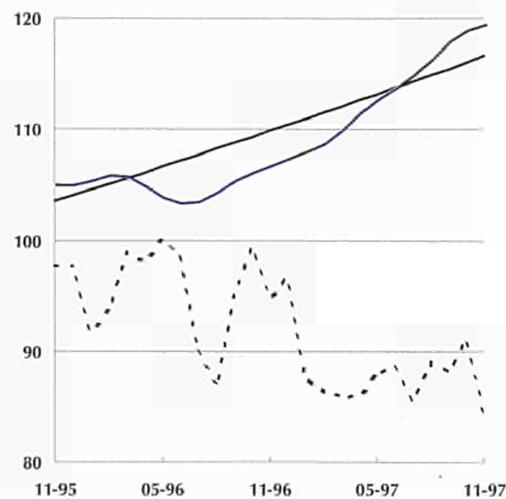
Ellada



España



France

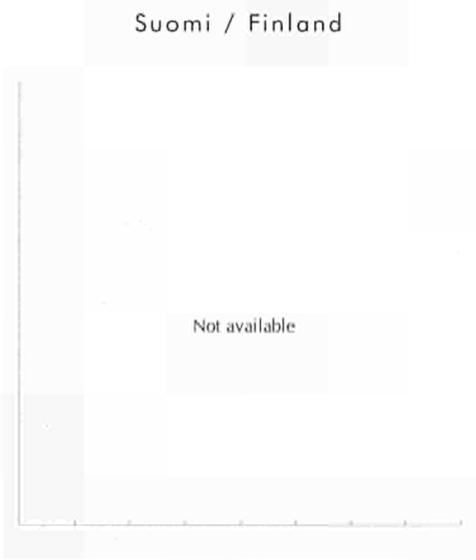
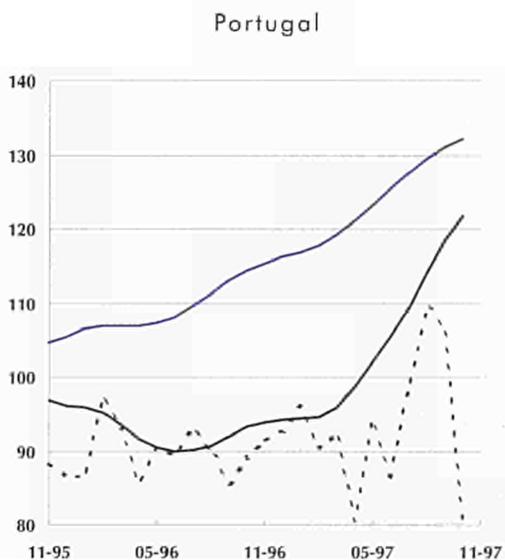
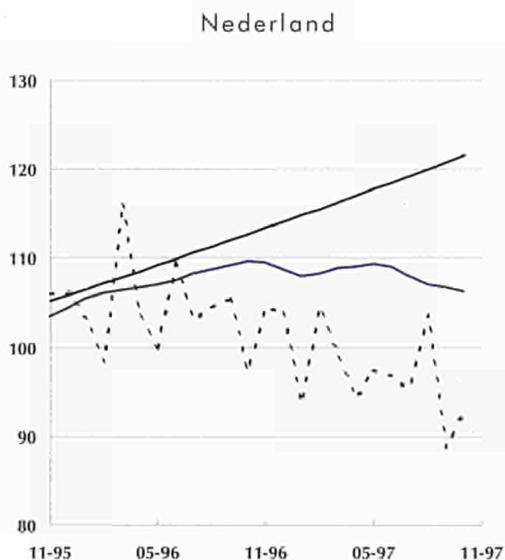
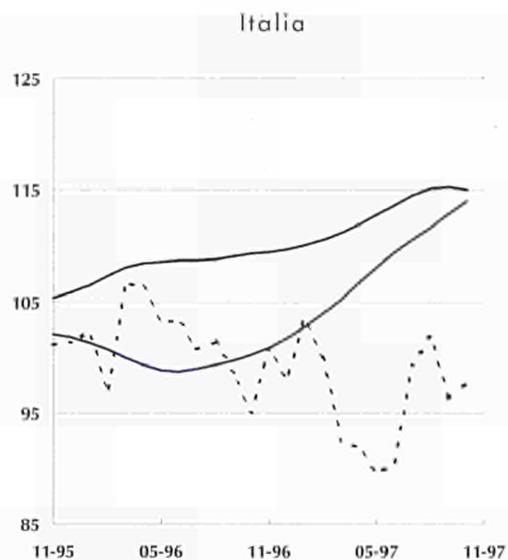
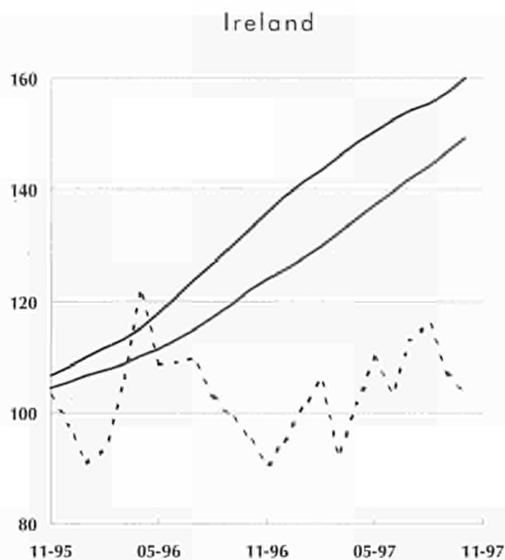


— Export value index
— Import value index
- - - Terms of trade

Source:  eurostat

Figure 3.16

Foreign trade indices
in ECU terms
(1995 = 100)



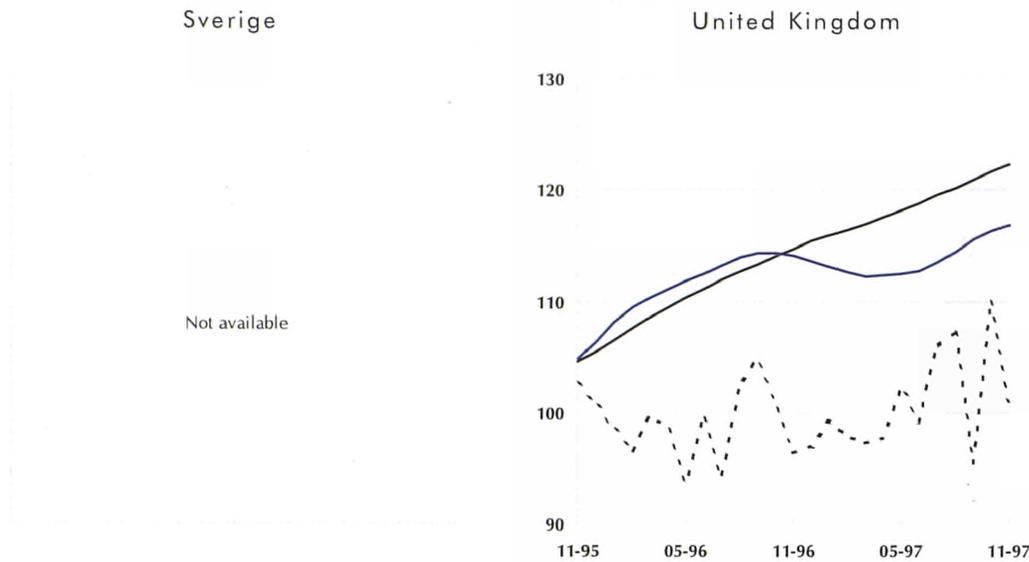
Export value index —
Import value index —
Terms of trade - - - -

Source: eurostat

Foreign trade indices (trend cycle)

Figure 3.16

Foreign trade indices
in ECU terms
(1995 = 100)



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

Further information - the foreign trade indices:

For the indices of imports and exports, foreign trade data of industrial products (following the nomenclature of the Harmonised System) were grouped according to the industrial NACE Rev.1 activity to which they belong. This grouping of products causes inevitably certain inaccuracies which can reduce the reliability of these foreign trade series. The indices for EU-15 refer only to extra-Union trade, the indices for Member States reflect also intra-Union trade.

For more extensive details of the methodology of short-term indicators please refer to the Eurostat publication "Methodology of Industrial Short-term Indicators" - CA-97-96-079-EN-C. Full methodological notes for this publication may be found on page 73.

Source: eurostat

4.

Data diskette



The files on the diskette are broken down by industrial branch. Each file contains all countries and indicators for a particular industry. The files have the following format: country, indicator, branch, periodicity, datatype, flag, data, e.g. EF;PROD;B0020;M;S;*;85.14164...

Step by step guide to using the data on the diskette:

1. Copy the file MPEI1.EXE (English number format) or MPEI2.EXE (continental European number format) from the diskette to a directory on your hard disk (usually C:\....).
2. If in WINDOWS, switch to the File Manager and double-click on the file. The files will self-extract themselves (into the directory from which the program is run). You may need to perform WINDOW - REFRESH <F5> to see the files once the procedure has finished.
3. If in DOS move to the directory you placed the file in (for example, C:\DATA>) and then type the name of the

file (MPEI1.EXE or MPEI2.EXE) and press <ENTER>, the files will self-extract and be placed in the same directory as the .EXE file.

4. The files are simple, plain text files, with the .TXT extension. The files are semi-colon separated (;) and use speech marks as a delimiter.
5. It should be easy to import/open the data-files into any standard spreadsheet or database package.
6. There is a file for each branch available at the NACE 2-digit level, codes are given in the README.TXT file supplied on the diskette.
7. Furthermore, there are two files called STRUCT1.EXE (English number format) and STRUCT2.EXE (continental European number format) with the structural data, for the industry covered in section 3 of the publication. It is also detailed in the README.TXT file.

If you would like to receive the data by e-mail as soon as it is extracted, please send a message to Raffaella Turci (raffaella.turci@eurostat.cec.be) requesting the data.

Divisions:

B0020	Total Industry excluding Construction	B2400	Chemical Industry
B0040	Intermediate Goods Industry	B2500	Manufacture of Rubber and Plastic Products
B0050	Capital Goods Industry	B2600	Manufacture of other Non-Metallic Mineral Products
B0060	Durable Consumer Goods Industry	B2700	Manufacture of Basic Metals
B0070	Non-Durable Consumer Goods Industry	B2800	Manufacture of Fabricated Metal Products
B1000	Mining of Coal and Lignite; Extraction of Peat	B2900	Mechanical Engineering
B1100	Extraction of Crude Petroleum and Natural Gas; Service Activities Incidental to Oil and Gas Extraction, excluding Surveying	B3000	Manufacture of Office Machinery, Computers
B1200	Mining of Uranium and Thorium Ores	B3100	Manufacture of Electrical Machinery
B1500	Food and Drink Industry	B3200	Manufacture of Radio, TV and Communication Equipment
B1600	Tobacco	B3300	Manufacture of Medical, Precision and Optical Instruments
B1700	Manufacture of Textiles	B3400	Manufacture of Motor Vehicles
B1800	Clothing Industry	B3500	Manufacture of Other Transport Equipment
B1900	Leather and Shoe Industry	B3600	Manufacture of Furniture; Manufacturing not elsewhere classified
B2000	Manufacture of Wood and Products of Wood	B4000	Electricity, Gas, Steam and Hot Water Supply
B2100	Paper Industry	B4500	Construction
B2200	Publishing, Printing, Reproduction of Recorded Media		
B2300	Manufacture of Coke, Refined Petroleum Products, Nuclear Fuel		

5.

Methodological notes

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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. Data have been based on 1995 = 100, using weights from the annual surveys of 1995.

Main industrial groupings that are used in Section 2 of this publication have the following definitions in terms of NACE Rev.1.

Total industry

C + D + E,

i.e. mining, manufacturing and energy supply

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

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

If Member States dispose of more detailed data series at the 4 digit level of NACE Rev.1, a more elaborate definition at this level of disaggregation is used.

Statistical sources

Most of the data in this publication is harmonised data supplied to Eurostat by the 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 sub-contractors to Eurostat;
- 3) the data for the USA and Japan, which are supplied by the OECD.

Every effort has been made to include data for the EU-15 Member States. The indices from 1991 onwards are on a post-unification basis and include East-Germany.

Short term indicators

The index of production measures changes in the volume of the gross value added created by industry, the branch indices being aggregated by means of a system of weighting according to gross value added at factor cost. The indices are adjusted to take account of the varying number of working days in the month.

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.

Sometimes statistics are collected at the product level. This may be the case for prices, production, imports and exports. Thus, data is not strictly speaking following an activity classification (NACE Rev.1) but a product classification (Classification of Products by Activity "CPA"). CPA, was laid down in a Council Regulation in 1993. It is a six digit classification which for the 2-digit, 3-digit and 4-digit level is identical to NACE Rev.1 in its coding.

For the indices of imports and exports, external trade data of 9,000 industrial products were grouped according to the industrial NACE Rev.1 activity to which they belong. This grouping can cause certain inaccuracies in the data, which may reduce the reliability of foreign trade series.

Statistical sources, signs & abbreviations

The value indices are all in ECU terms. The indices for the EU refer only to extra-Union trade, the indices for Member States reflect also intra-Union trade.

For further details of the methodology employed, please refer to the Eurostat publication "Methodology of Industrial Short-term Indicators" CA-97-96-079-EN-C.

Seasonal adjustment

All series, except prices and capacity utilisation, are seasonally adjusted with TRAMO / SEATS, a method developed by Professor Maravall and V. Gomez. For France, Finland, Sweden and the United Kingdom the indices are seasonally adjusted by the national statistical office. For Germany, the trend and seasonally adjusted figures for the production index are calculated by the national statistical office. Otherwise, Eurostat calculates the trend cycle, i.e. seasonally adjusted series, where additionally the irregular fluctuations have been excluded (using the program TRAMO / SEATS).

Growth rates

The changes which are given in the tables show three different growth rates. The first being for the latest three months data compared to the previous three months data - here the trend cycle is used. The second growth rate is for the latest three months data compared to the same three months of the previous year - here a series only adjusted for the number of working days is used. The third is a year on year growth rate for a particular month - here gross data for prices is used. Estimates are sometimes made to create a EU-15 or EUR11 total.

Graphs

The line graphs show the trend cycle. The bar graphs show the annual growth of the index, using a working day adjusted series. For Member States where just one month is missing (and not more), this missing value was estimated in order to bring the growth rate for all Member States up to the same date. This estimation is indicated by ** in the graph.

Structural data

Data for structural statistics are in current ECU unless otherwise stated. Data for value added at factor cost, production, labour costs and employment come from annual enquiries conducted by Member States involving all enterprises with 20 or more employees. The exceptions to this are Spain (local units of all sizes), Portugal (enterprises with 10 or more employees) and Finland (establishments employing 5 or more persons). The employment data relates to the number of persons employed, excluding home workers.

Estimates are not supplied to Eurostat by Member States for the smaller firms not covered by the enquiries, and hence the figures under-report the actual values. In certain industries this may be a serious problem in the interpretation of series, especially when comparing with other industries.

Gaps in Eurostat's data have been filled by estimates supplied by sub-contractors to Eurostat. Thus, EU-15 and EUR11 totals often contain estimates for missing countries. Estimates are shown in bold. Attention should be drawn to the fact that the data has switched to the NACE Rev.1 classification, this may result in revisions of data being made in the medium-term.

Annual foreign trade data comes from the COMEXT database. Statistical régime 4 (total trade) is used.

Signs and abbreviations

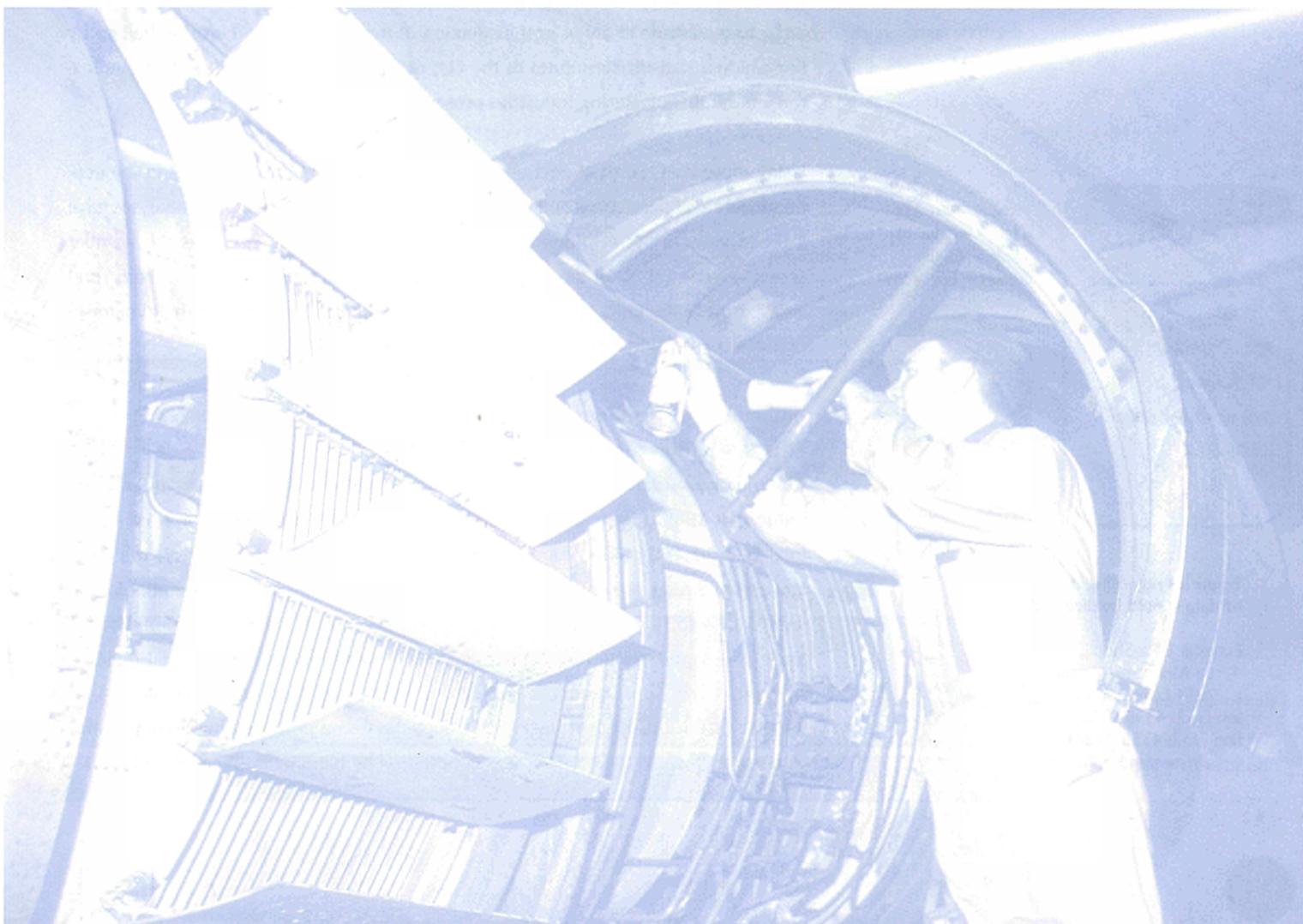
EUR11	Monetary union participating countries
B / L	Belgo-Luxembourg Economic Union
ECU	European currency unit
TRIAD	EU-15, Japan and the USA
Billion	thousand million
*	not available (in graphs)
:	not available (in tables)
**	estimation (in graphs)
data in bold	estimation (in tables)
1995 = 100	reference year

For more information on methodology, please contact Berthold Feldmann - tel: (352) 4301 34401 or e-mail: berthold.feldmann@eurostat.cec.be

6.

Manufacturing employment in Objective 5b areas

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6. Manufacturing employment in Objective 5b areas

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Introduction

The underlying goal of Community structural policies is to reduce disparities between the regions in terms of their socio-economic situation and development. The first comprehensive Structural Funds programme was designed for the period 1989 to 1993. Efforts were directed towards six special Objectives.

The measures set up under Objective 5b were aimed especially at the development of rural areas. In nine Member States, the regions found eligible covered a population of about 16.5 million people or roughly 5% of the twelve countries of the European Union as they were before 1995. It should be noted, however, that large rural areas can also be found in the regions which were supported under Objective 1 (i.e. the regions whose development is lagging behind).

Community assistance is implemented by way of Community Support Frameworks that contain the range of programmes and measures to be financed in the regions concerned. In general, it is very difficult to evaluate the success of such programmes and, in particular, to separate effects which are due to the funds from those which are linked to economic development at international, national or local levels. In order to contribute to an ex post evaluation of the programmes, Eurostat, helped by the national statistical institutes of the EU, developed a database of sectoral indicators on the manufacturing industries present in the areas concerned.

Using these data, Eurostat devised a series of analyses on developments in the economic fabric of these areas and the related employment changes; these analyses gave a broad view of the economic situation. The available data concerns six Member States, covering 93% of the eligible population under Objective 5b. In these rural areas, most of the units operate on a small to medium-size scale and the dynamism of SMEs is crucial to maintain populations there.

Community assistance:

ECU 2.6 billion for the period 1989-1993

Community assistance for the development of rural areas amounted to ECU 2,607 million (at 1989 prices) for the period 1989-1993. This accounted for 4.6% of the total ECU 56,162 million for Structural Funds for this period. However, the assistance from Structural Funds is not meant to be independent from the Member States' efforts. Instead, the Community co-finances national aid. Thus, Community assistance was supplemented by the Member States with various national and regional sources as well as with contributions from the private sector. On average, around 30% of total assistance was financed through the Community and the private sector, respectively, whilst almost 40% was contributed by national public resources.

Enquiries regarding the purchase of data should be directed to:

Eurostat Data-Shop
4, rue Alphonse Weicker
L - 2014 Luxembourg
tel: (352) 4335 2251
fax: (352) 4335 22221
e-mail: agnesn@eurostat.cec.be

Introduction

Table 6.1 gives an overview of the funds allocated to each Member State. In addition, the number of inhabitants in the Objective 5b areas is given. France, Germany (referring to the size of its population in 1989, before unification) and Spain were the countries whose population was most concerned by this Objective (5% to 10% of the total population), while the affected part for almost all other countries was under 3%. The last column in the table shows the intervention intensity of the Community support per inhabitant of the eligible areas during the first programming period. It ranges from ECU 99.3 and 111.9 per person for the Netherlands and Belgium, respectively, to ECU 287.5 and 487.6 per person for Spain and Luxembourg. However, the highest value may be partly explained by the low number of inhabitants in the eligible areas of Luxembourg.

For the Objective 5b areas, the Community Support Frameworks concentrated on the following priorities:

- ★ diversification of agriculture;
- ★ diversification / development of the non-agricultural sector (especially the manufacturing sector);
- ★ development of tourism;
- ★ development of human resources;
- ★ environmental protection.

A closer look will be taken in this study at the effects of the Structural Funds programmes with respect to the second priority: the diversification and development of the non-agricultural sector, especially the manufacturing sector.

This article will consider the employment and sectoral developments between 1986 and 1993 for which data is available for the eligible regions of Belgium, Germany, France, Italy, the Netherlands and the United Kingdom (see the end of the article for more details of the definitions and sources employed).

	Total amount of Structural Funds (all funds allocated, million ECU at 1989 prices)	Share of EEC funding within total assistance (%)	Inhabitants of eligible areas (thousands)	Inhabitants as a % of total population	EEC funding per inhabitant of eligible areas (ECU per person)
B	97.4	33.4	291	2.9	111.9
DK	68.0	33.8	107	2.1	214.7
D	1,720.9	30.5	4,612	7.4 (1)	113.8
E	693.7	41.1	991	2.5	287.5
F	3,413.5	28.1	5,830	10.2	164.7
I	1,509.5	25.5	2,905	5.1	132.5
L	11.2	22.4	5	1.3	487.6
NL	165.9	26.5	443	2.9	99.3
UK	739.2	47.3	1,322	2.3	264.8
EU-12	8,419.4	31.0	16,506	5.4	157.9

Table 6.1

Structural funds support for Objective 5b areas, 1989-1993

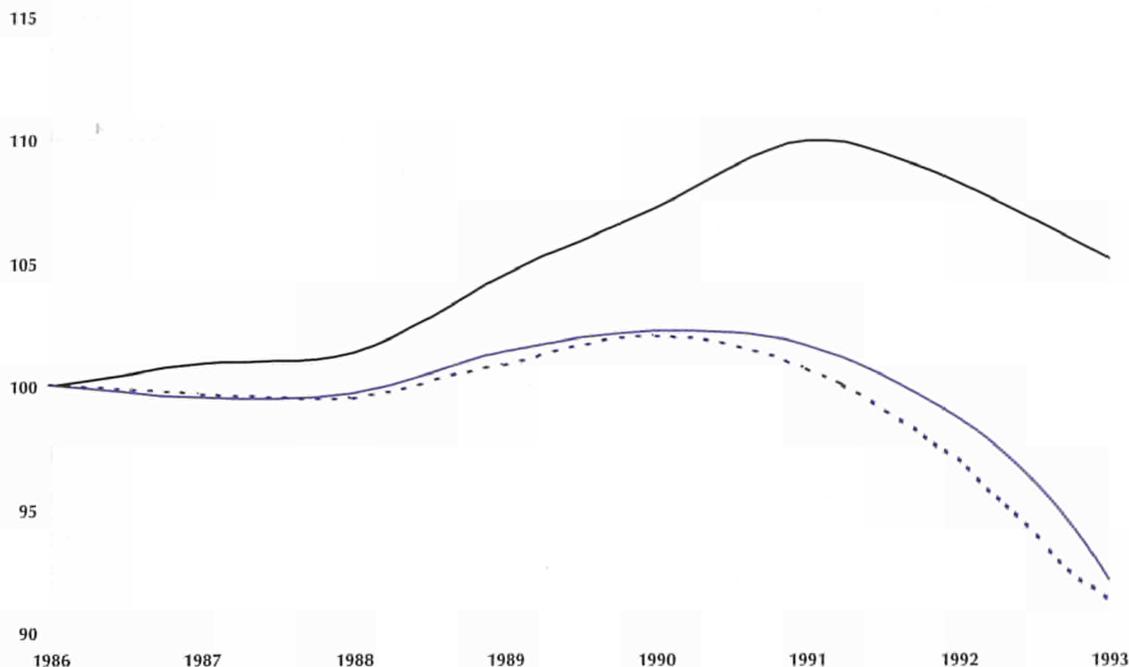
1) West Germany only

Source: European Commission

Figure 6.1

Employment trends in manufacturing industry (1986 = 100)

Eligible EU-6 —
EU-6 —
EU-12 - - - -



Source:  eurostat

Employment trends in manufacturing: better than in the whole Union with some exceptions

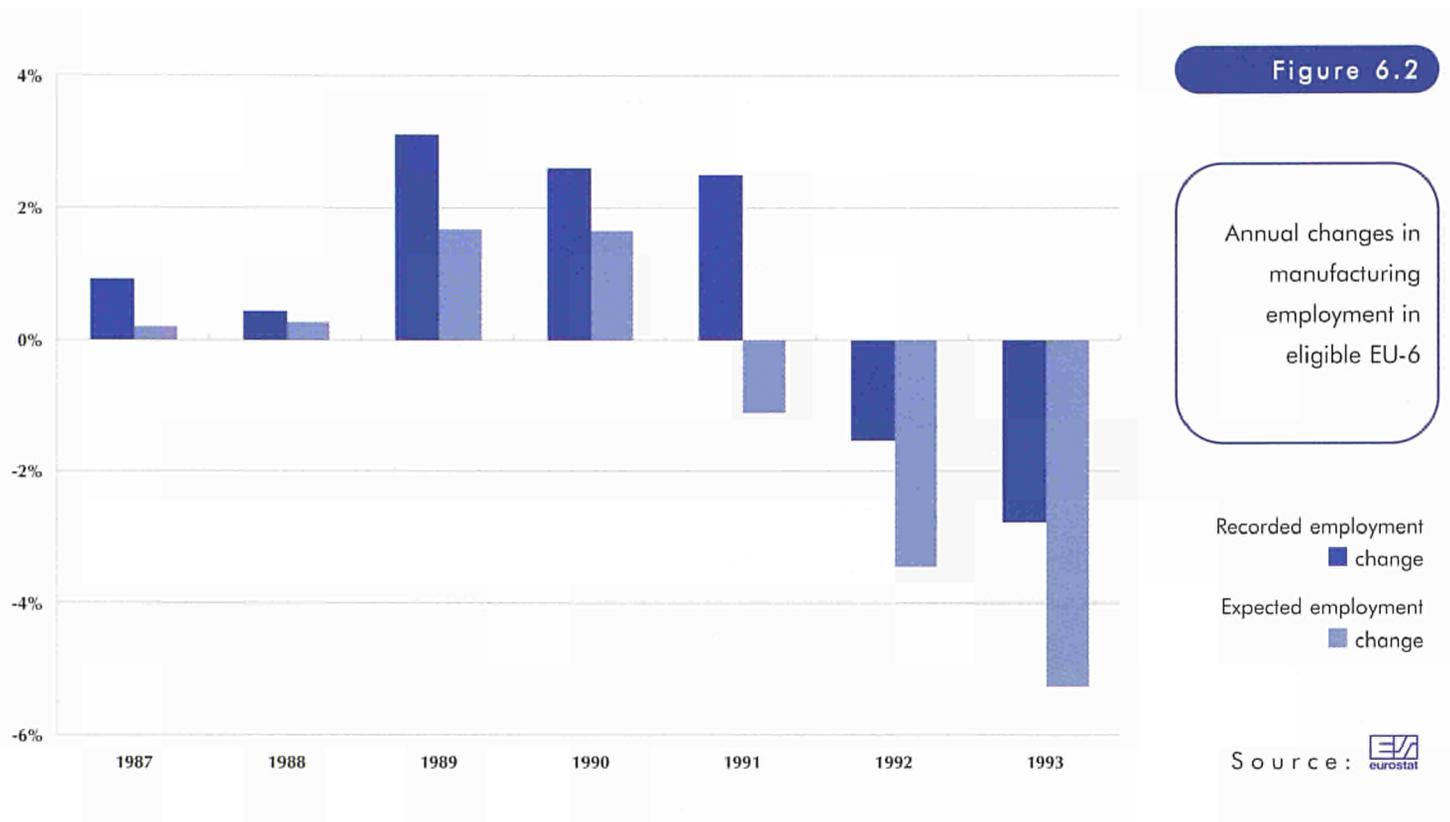
In the countries reviewed, the eligible areas supported under Objective 5b experienced a more positive development in manufacturing employment than the European Union as a whole. They were hit one year later by the downturn in employment which had started for the European Union as a whole in 1991. Despite a decline in 1992 and 1993, a net increase of 46,000 persons was recorded in manufacturing employment between 1989 and 1993 in the eligible areas.

This result coincides with the overall Objective of developing rural areas. It can be seen as fairly modest, but in the context of a general decline in manufacturing employment it should be acknowledged.

Out of a total of 41 regions, half of them experienced a positive employment evolution in manufacturing industry. However, the situation varies greatly from one country to another.

The two regions with the greatest positive (Cornwall / Devon) and negative (Highlands / Islands) relative changes are both to be found in the United Kingdom, whose eligible areas experienced in total a decline in manufacturing employment of 17% between 1989 and 1993. Italian areas recorded the highest average employment growth (3.7%) during the period, followed by the eligible areas in Germany (3.0% on average). In France, the eligible region with the lowest employment (Franche-Comté) showed the highest positive relative change, whereas the second largest region (Limousin) recorded the highest negative absolute change.

Local effects in the eligible areas



Local effects in the eligible areas: largely positive

Within overall employment trends it is possible to single out the share attributable to non-structural factors, which may also be called “local effects”. The local effects are measured by calculating the difference between recorded employment changes in the manufacturing industry of a given area and expected employment changes in this area. The latter are derived by applying the average European Union employment changes in each industry to the industries in the area. During the period 1989 to 1993, these included the impact of the allocation of Structural Funds, although it is not possible to separate this from other possible local economic effects.

For the eligible areas taken as a whole, these local effects were clearly positive, even during the decline in manufacturing employment in the early nineties (see Figure 6.2). At the country level, a variety of developments emerges. Local effects had a positive impact on the development of eligible

areas in Belgium (except in 1991), which was rather strong in 1989, yet less so in 1992 and 1993. In the eligible areas of Germany and France positive local effects could be recorded during most of the period 1989-1993. Except in 1990, local effects in the eligible regions of Italy were always positive, especially from 1989 onwards with an “anticyclical” employment increase in 1992. In the eligible areas of the Netherlands the development was quite different: positive local effects in 1987, 1990 and 1992 alternated with negative local effects. Contrary to the positive developments in the other countries, the evolution of manufacturing employment in eligible areas of the United Kingdom was worse than that which could have been expected during almost the whole period, except in 1989.

Figure 6.3

Weak demand regions in 1989 and 1993

weight of low demand industries in 1989 ———
weight of low demand industries in 1993 - - - - -

Source:  eurostat



Industrial structure: predominance of weak demand industries

The areas supported under Objective 5b are characterised by an industrial structure with a fairly low or medium level of technology. With almost 50% of manufacturing employment taken up by so-called weak demand industries, the share of these sectors is way above the EU average of around 35%.

Employment gains in the eligible regions can be mainly attributed to the medium demand sectors which, in 1989, accounted for 38% of the manufacturing employment (compared to a European average of 43%). The share of strong demand sectors in the total manufacturing employment of the eligible areas stayed at around 13% during the programming period and almost 10 percentage points below the EU average.

Analysing the industrial structure at the regional level, three groups of regions can be distinguished. In 25 of the 41 areas under review, more than 45% of the persons employed in the manufacturing sector worked in weak demand industries in 1989. A

more detailed analysis of the data at the sectoral level reveals that the manufacture of non-metallic mineral products and of metal articles, the footwear and clothing as well as the timber and wooden furniture industries were the most important activities, accounting on average for more than 40% of manufacturing employment. In nearly three quarters of these weak demand regions the employment situation improved between 1989 and 1993.

In only ten¹ of the regions, strong demand industries accounted for more than 15% of the manufacturing employment. On average, electrical engineering was the most important, before the chemical industry and instrument engineering. In the remaining regions, the medium demand industries played an important role, with shares ranging between 50% and 77% of manufacturing employment.

1) The Italian region Toscana has been listed with the high demand regions. The share of strong demand sectors was more than 22% in 1989, although the share of weak demand industries exceeded 45%.

Industrial structure

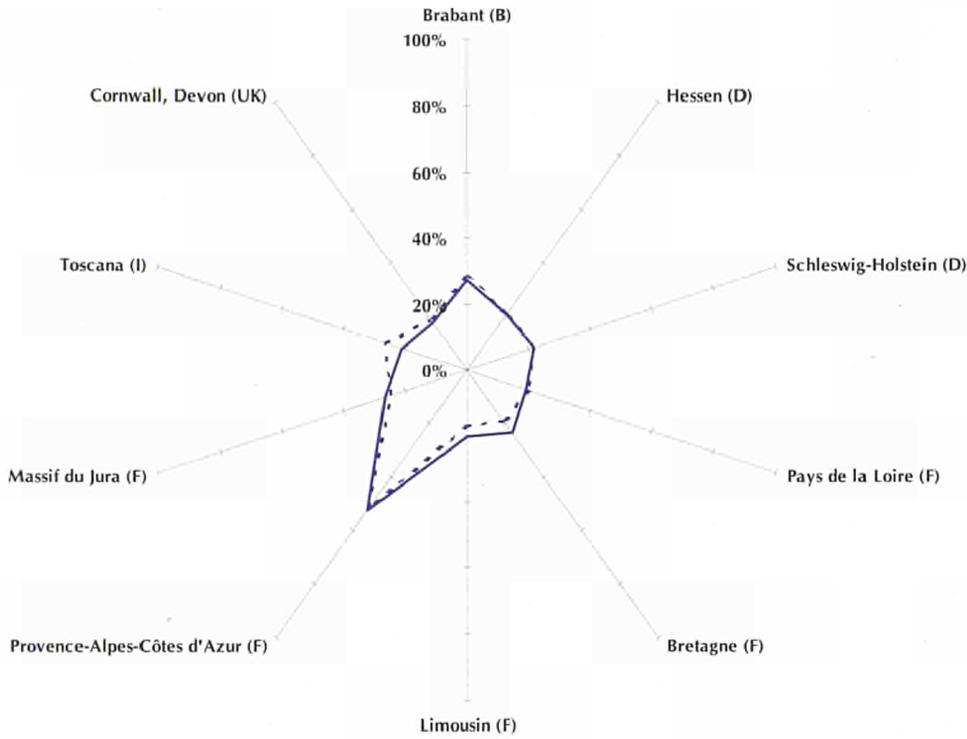


Figure 6.4

Strong demand regions in 1989 and 1993

weight of high demand industries in 1989
 weight of high demand industries in 1993

Source: eurostat

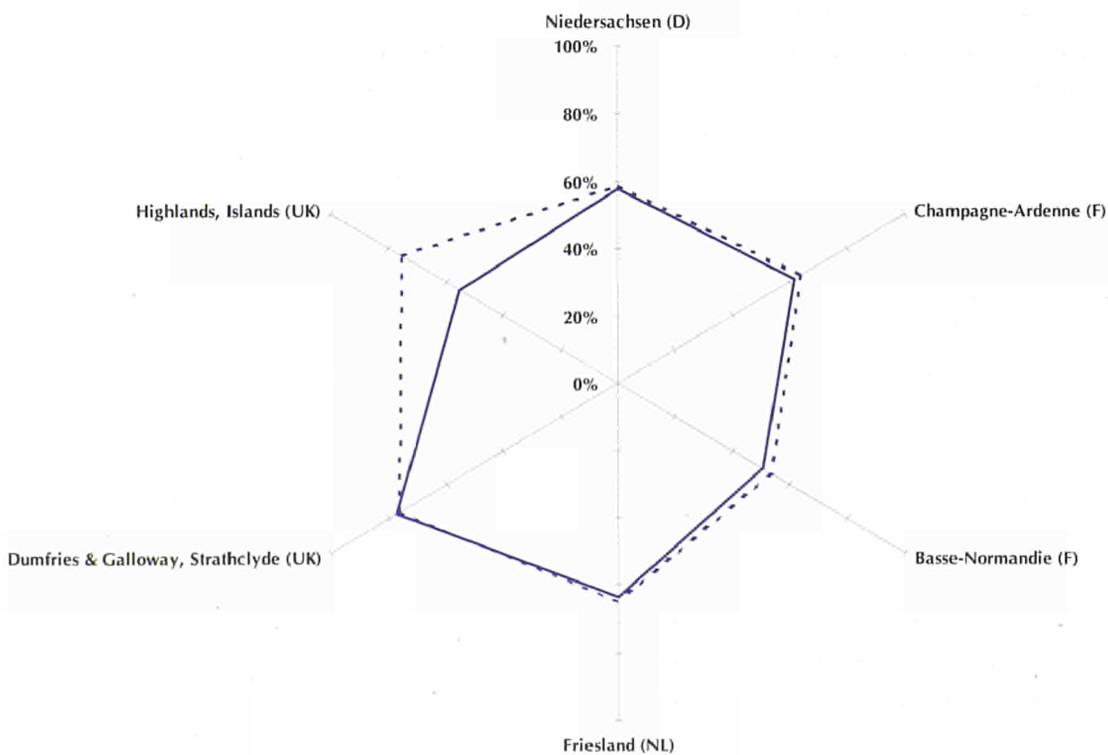


Figure 6.5

Medium demand regions in 1989 and 1993

weight of medium demand industries in 1989
 weight of medium demand industries in 1993

Source: eurostat

Sectoral development in the eligible areas:**country review**

The following describes the relative contribution of the different sectors to the development of manufacturing employment in the eligible areas of each country. Average employment during 1986-1989 has been compared to 1990-1993.

Belgium

In 1989, office machinery / electrical and instrument engineering and timber and wooden furniture accounted for 37% of the manufacturing employment in the eligible areas. The latter deserves special attention because it contributed most to the average increase of 600 jobs. The development of this industry is in line with one of the main goals of the Structural Funds support for the Belgian Objective 5b areas: the best exploitation of the forestry potential through favouring the development of an appropriate industrial structure.

Germany

The average level of manufacturing employment between 1990 and 1993 was 8% (or 48,000 jobs) higher than during 1986 to 1989. Here, the manufacture of metal articles and the processing of rubber and plastics (included in the "other" group) contributed 22.1% and 21.0% respectively to employment growth in the eligible areas. Textile and clothing was the activity with the highest job losses between the two periods.

France

The two activities with the largest shares in manufacturing employment in 1989, manufacture of metal articles (11.0%) and food, drink and tobacco (16.1%), also recorded the highest contributions to employment growth in the eligible areas: 71.9% and 65.7% respectively. However, the high amplitudes for the contributions of these activities result from a modest 2% relative increase in the employment level between the two periods, which represents nonetheless 7,000 more jobs in the eligible areas.

Italy

The textile and clothing industry recorded the highest share of manufacturing employment in 1989 (34.7%). Only in Italy did this activity contribute positively to employment growth in the eligible areas. The manufacture of metal articles, which accounted for 11.4% of manufacturing employment in 1989, added 27.9% to the overall positive development. The average level of manufacturing employment rose between the two periods by 9% or almost 20,000 jobs.

Netherlands

Although the average level of total manufacturing employment stayed basically the same, at the activity level some shifts were recorded between the two periods. In 1989, the two activities food, drink and tobacco and office machinery / electrical and instrument engineering covered 46% of manufacturing employment. Between the two periods, the employment level in these two industries dropped by 1,600 jobs although the decline was slightly overcompensated by employment gains in most of the other industries.

United Kingdom

The most important industry in 1989, manufacture of transport equipment, also experienced one of the greatest declines in employment. Between 1990 and 1993 the average level of manufacturing employment was 13% (or almost 5,000 jobs) lower than between 1986 and 1989.

Sectoral development in the eligible areas

Belgique / België

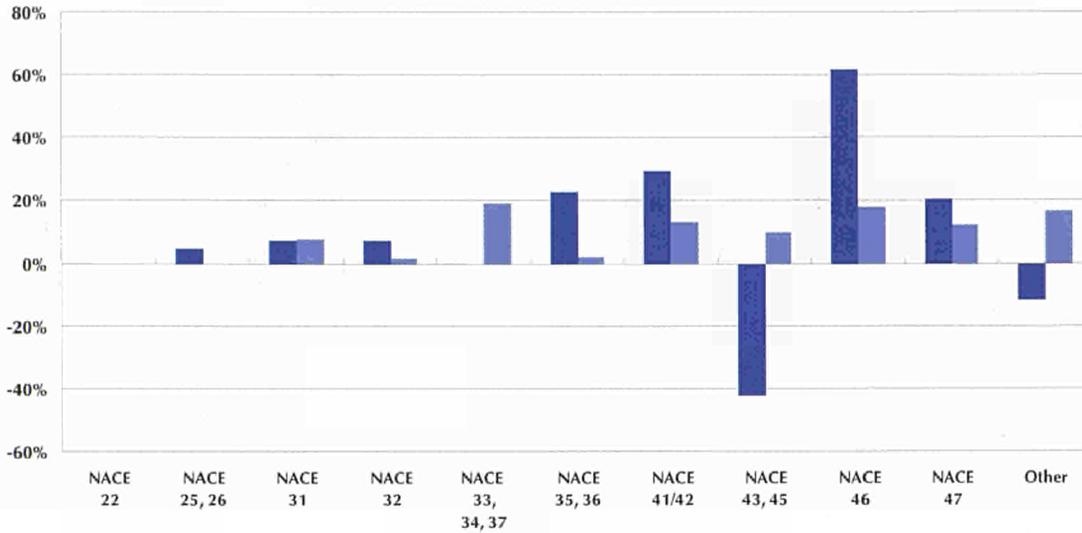
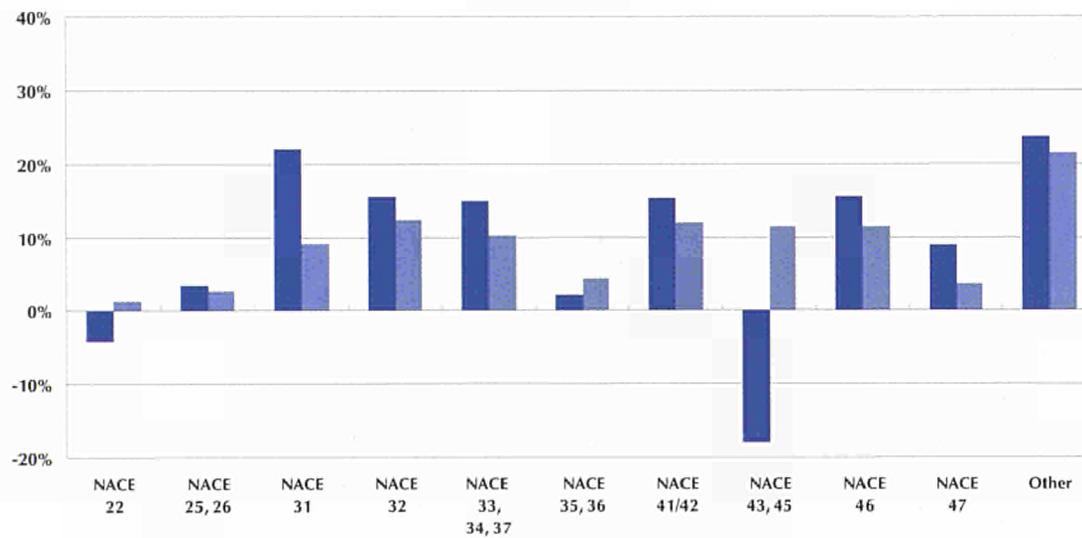


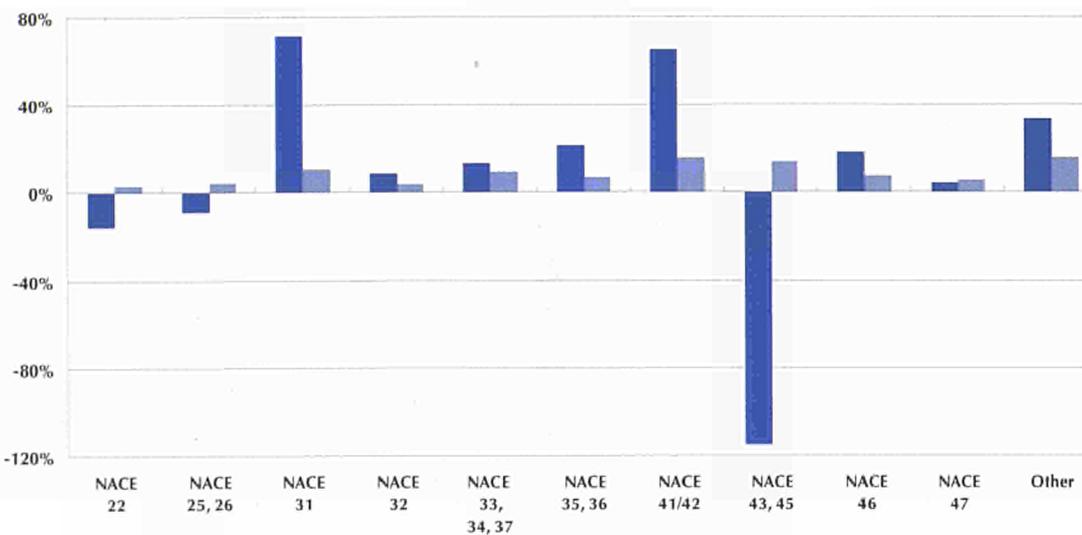
Figure 6.6

Relative contribution of the sectors to employment changes

Deutschland



France



- NACE 1970 codes:**
- 22: Production and preliminary processing of metals;
 - 25: Chemical industry;
 - 26: Man-made fibres industry;
 - 31: Manufacture of metal articles (except for mechanical, electrical and instrument engineering and vehicles);
 - 32: Mechanical engineering;
 - 33: Manufacture of office machinery and data processing machinery;
 - 34: Electrical engineering;
 - 35: Manufacture of motor vehicles and of motor vehicle parts and accessories;
 - 36: Manufacture of other means of transport;
 - 37: Instrument engineering;
 - 41/42: Food, drink and tobacco industry;
 - 43: Textile industry;
 - 45: Footwear and clothing industry;
 - 46: Timber and wooden furniture industries;
 - 47: Manufacture of paper and paper products; printing and publishing

Relative contribution to employment changes between 1986-1989 and 1990-1993

Share of manufacturing employment in 1989

Figure 6.6

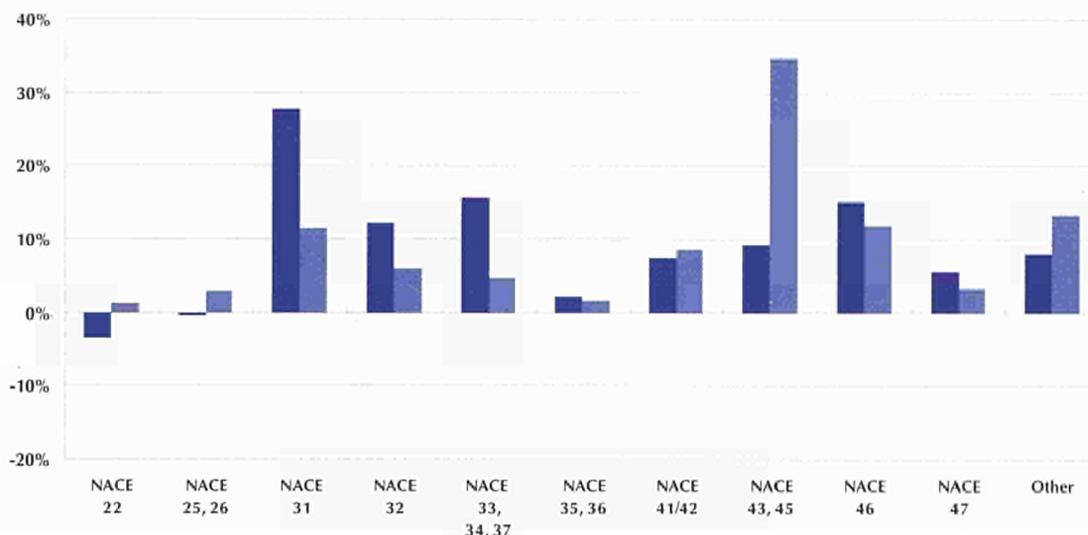
Relative contribution of the sectors to employment changes

NACE 1970 codes:
 22: Production and preliminary processing of metals;
 25: Chemical industry;
 26: Man-made fibres industry;
 31: Manufacture of metal articles (except for mechanical, electrical and instrument engineering and vehicles);
 32: Mechanical engineering;
 33: Manufacture of office machinery and data processing machinery;
 34: Electrical engineering;
 35: Manufacture of motor vehicles and of motor vehicle parts and accessories;
 36: Manufacture of other means of transport;
 37: Instrument engineering;
 41/42: Food, drink and tobacco industry;
 43: Textile industry;
 45: Footwear and clothing industry;
 46: Timber and wooden furniture industries;
 47: Manufacture of paper and paper products; printing and publishing

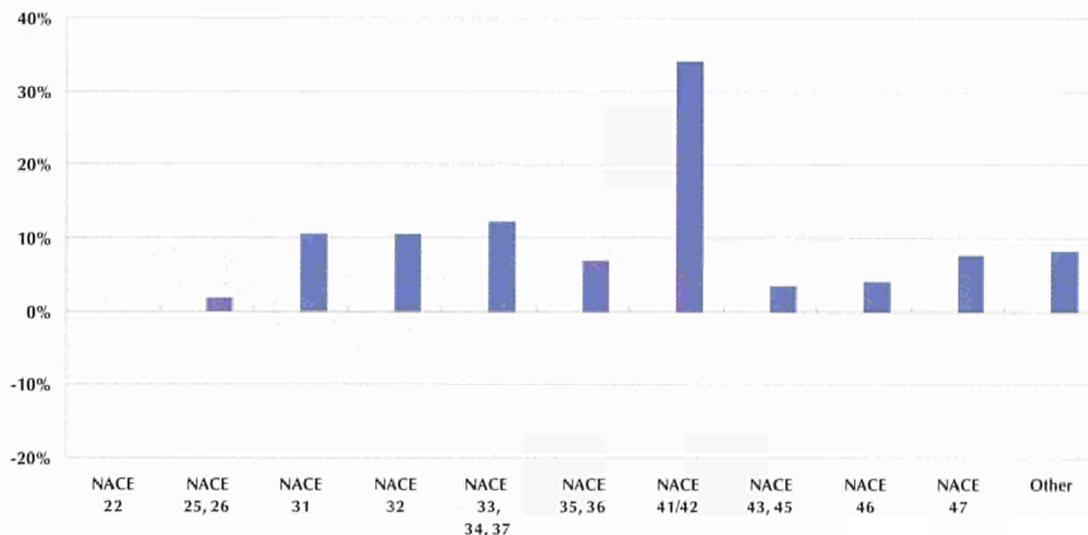
Relative contribution to employment changes between 1986-1989 and 1990-1993

Share of manufacturing employment in 1989

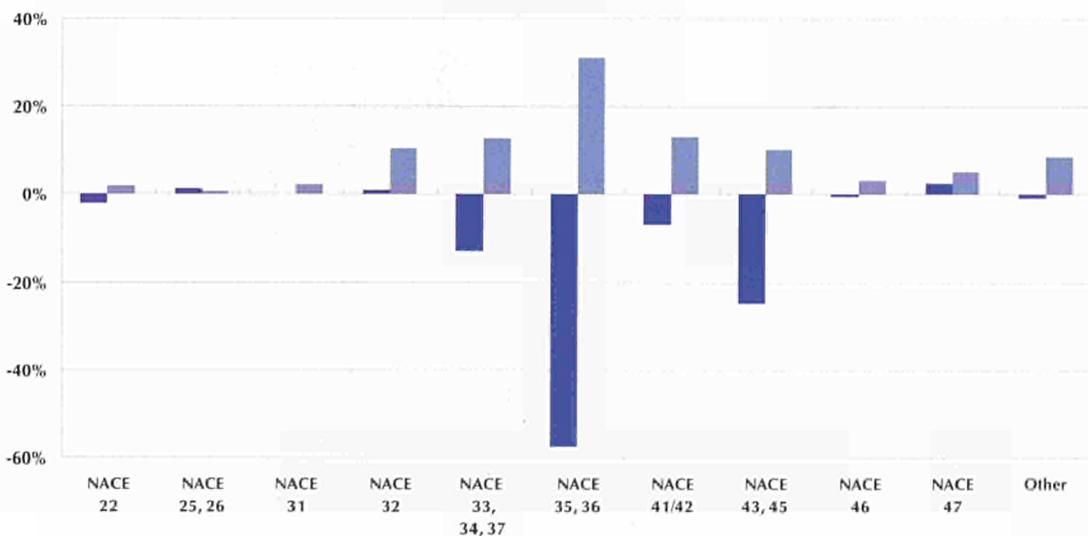
Italia



Nederland



United Kingdom



Source: eurostat

Development and structure of the stock of units

The economic activities which seem to have experienced an increase in their employment are mostly those characterised by a predominance of SMEs: manufacture of metal articles, manufacture of timber, wooden products and furniture, processing of plastics and rubber, and the agro-food industry. On the contrary, industries characterised by large-scale production like electrical engineering or the production of transport equipment lost many jobs in the areas reviewed. It is also interesting to note that the textile and clothing industry which experienced a very severe crisis is the source of employment growth in Italian eligible areas. This good result can probably be linked to a flexible approach to organising production (using a network of subcontractors) which has been developed in these regions.

These sectoral changes show that SMEs are really at the core of industrial development in rural areas. There are some spectacular and successful examples which should be further studied.

Development and structure of the stock of units

In the Objective 5b areas of Belgium, France, Italy, the Netherlands and the United Kingdom, 20,500 units employing 20 or more persons were recorded in 1989 (see page 89 for enterprise population coverage). This number decreased by almost 10% until 1993. In France and the United Kingdom this was accompanied by a decrease in the average size.

For the eligible areas of France, Italy and the United Kingdom, some information on smaller units is available which shows somewhat different trends: more dynamism implying that there has been some creation of units or the growth of very small units and, especially in Italy, an orientation towards more strong demand industries.

However, the data is generally quite difficult to analyse and only a few conclusions on the available data are described for each country.

Belgium

In the eligible areas, local units with more than 20 persons employed witnessed a decline during the first programming period. In 1989, 78 units were recorded, compared to only 66 in 1993. These figures hide, however, a peak of 82 units in 1990. The local units were concentrated mainly in the food, drink and tobacco and the timber and wooden furniture industries.

France

The local units situated in the eligible areas showed a more positive trend than for corresponding development at the national level. The smaller units (10-19 persons employed), accounting for one fifth of all units reviewed, showed a steep increase in 1989 and 1991, the last year available for these units. These trends can be partly attributed to shrinking larger units. Indeed, the average size of units employing more than 20 persons dropped by 10 persons between 1986 and 1993, following the same trend at the national level.

As concerns figures for enterprises employing more than 10 persons, the increase in the number of units does not always mean the creation of a new unit. It can also result from the growth of the number of persons employed in smaller units. Nonetheless, the sectoral developments show a noticeable dynamism especially in the manufacture of metal articles, the timber and wooden furniture industry, and other manufacturing industries (including jewellery, toys, etc).

Italy

In the Objective 5b areas of Italy, units employing less than 10 persons outnumbered those with 10 or more persons by roughly two to one. However, the positive trend of the smaller units could not outweigh the less favourable development of the larger units, as can be seen from the slight decrease in the number of all local units towards 1993. This fall in the number of units, however, was accompanied by a net growth in employment and thus the average size of the larger units increased over the period.

At the activity level, very clear changes can be observed in certain industries. A very strong decrease can be seen in the textile and clothing and in the timber and wooden furniture industries. On the other hand, there is a spectacular increase of almost the same dimension in the office machinery / electrical and instrument engineering industry and a slight increase in the agro-food industry.

The Netherlands

The development of the number of enterprises employing 20 or more persons in the supported regions was generally positive, but lagged behind the trend of the corresponding aggregate at the national level. The average size of the considered enterprises in the Objective 5b areas steadily declined between 1986 and 1993.

United Kingdom

In the eligible areas of the United Kingdom, local units employing less than 20 persons outnumbered those with 20 or more persons by almost four to one. A crisis in the development of small units is evident in 1990 and 1991. For larger units the crisis does not show in their number, which remains fairly stable, but in their average size which dropped by nearly 40 persons between 1986 and 1992 as the striking result of restructuring movement in British manufacturing industry.

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Further information - definitions and sources:

Objective 5b:

Areas eligible under Objective 5b have to satisfy the following three main criteria:

- low level of socio-economic development;
- high share of agricultural employment;
- low level of agricultural income.

The Structural Funds programmes supporting the Objective 5b areas have been financed through three funds: the European Regional Development Fund (ERDF); the European Social Fund (ESF); and the European Agricultural Guidance and Guarantee Fund (EAGGF).

Data used

To evaluate the impact of the Structural Funds operations on the eligible areas, the Member States were asked to supply information on the following variables: number of local units; number of persons employed; gross wages and salaries; turnover; gross value added; total investment, less disposals.

This article covers six of the nine Member States where regions received Structural Funds support according to Objective 5b: Belgium, Germany, France, Italy, the Netherlands, and the United Kingdom. For Denmark, Spain and Luxembourg no appropriate data could be gathered.

In principle the data covers the period 1986-1993 except for the Netherlands and the United Kingdom where 1993 is not yet available. For Germany, no data on the number of local units were received.

The enterprise population covered is the following:

Belgium

Local units with 20 or more persons employed.

Germany

All local units with at least one employee.

France

Local units of enterprises employing 10 or more persons (without armaments) except for the food, drink and tobacco industry which concerns more than 20 persons employed.

Italy

All local units.

Netherlands

Enterprises with 20 or more persons employed.

United Kingdom

All local units.

When comparing developments in the eligible areas with the situation in the European Union as a whole, data from the Industry domain of Eurostat's DAISIE database have been used which cover only industrial enterprises employing 20 or more persons.

Geographical breakdown

For the purpose of analysis, the data on the eligible regions have been aggregated at the NUTS II level. However, in the case of Germany it was not possible to only collect the information on the eligible areas. Here, all NUTS III regions containing eligible areas were selected and according to the programming level aggregated to the NUTS I level.

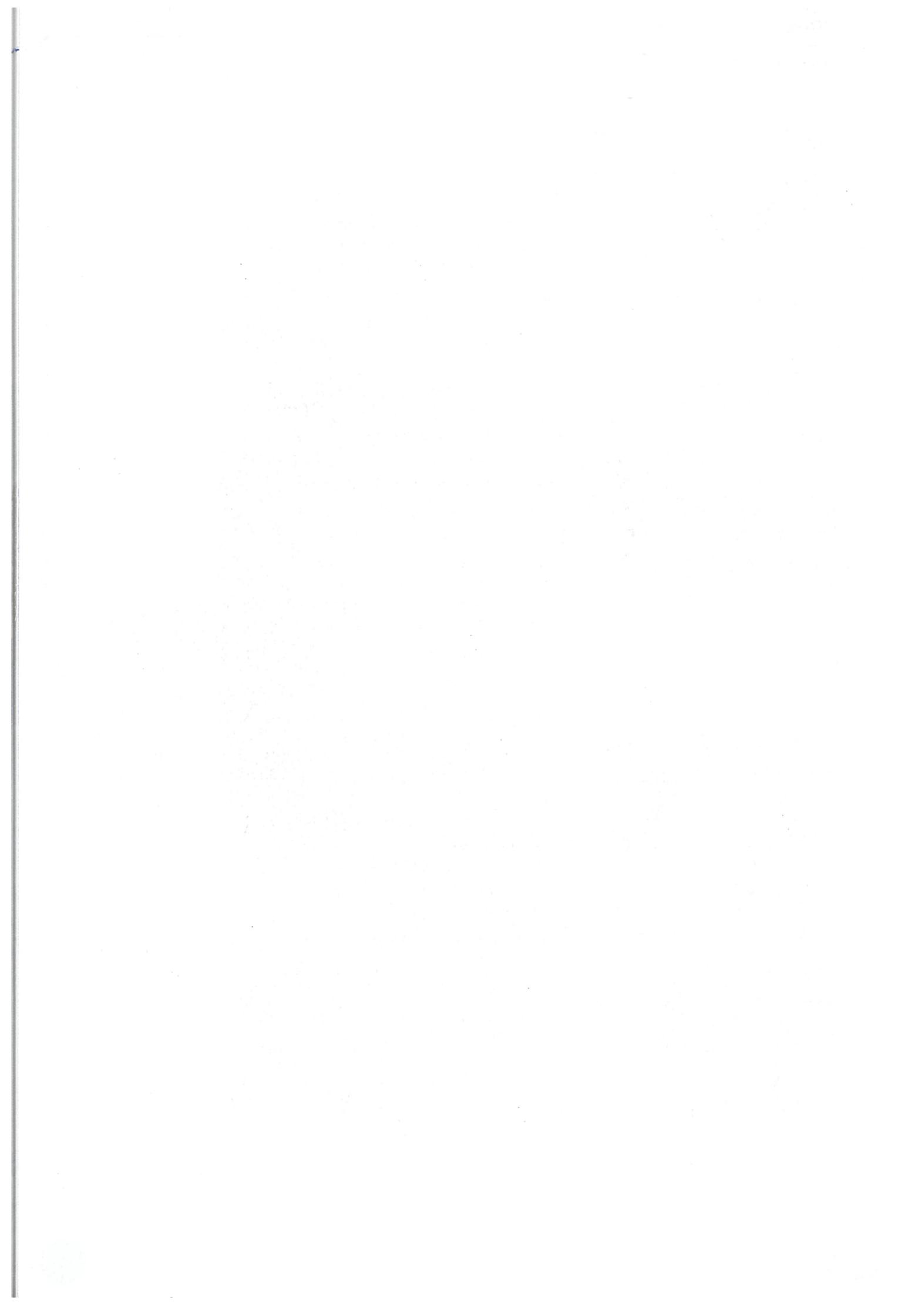
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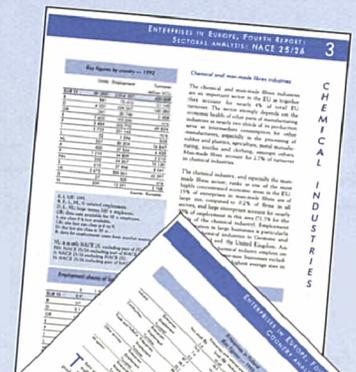
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