



KEY FIGURES ON

EUROPEAN BUSINESS

2023 EDITION



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**Key figures on
European business**

2023 edition

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Foreword

Key figures on European business presents a selection of key business statistics indicators for the European Union (EU), its individual Member States and European Free Trade Association (EFTA) countries, drawing from the rich collection of data that are available at Eurostat. Business statistics can be used to describe the structure, conduct and performance of businesses in the EU at a detailed sectoral level or they can be used to analyse emerging trends within the EU's business economy, tracing monthly or quarterly developments for indicators such as output, output prices or labour input.

Key figures on European business has been conceived to offer a balanced set of indicators. It starts with an overview of the business economy, followed by more detailed analyses that focus on four specific parts of the business economy – industry, construction, distributive trades and other non-financial services – while the publication closes with a chapter on tourism. Each of the chapters focusing on different parts of the business economy starts with an overview of the economic structure (in value added and employment terms) and continues with information on developments through to 2022.



The COVID-19 pandemic and related restrictions have impacted on almost every aspect of life in the EU (and further afield) since February/March 2020. More recently, data for 2022 may be impacted by a wider range of issues, for example aftereffects of the COVID-19 crisis on supply chains, higher levels of inflation and impacts from the Russian military aggression against Ukraine and the related sanctions.

Eurostat's most up-to-date statistics showing the economic and social impacts of various recent events can be found online in the [Eurostat Recovery Dashboard](#) and the [Euro indicators dashboard](#).

I hope that you find this publication interesting and useful.

Sophie Limpach

Director of business and trade statistics, Eurostat

Abstract

Key figures on European business presents a selection of key business statistics indicators for the European Union (EU) and its individual Member States, as well as the EFTA countries. This publication may be viewed as an introduction to European business statistics and provides a starting point for those who wish to explore the wide range of data that are freely available on Eurostat's website at <https://ec.europa.eu/eurostat> together with a range of online articles in *Statistics Explained*.

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For more information please consult

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Statistics Explained: <https://ec.europa.eu/eurostat/statistics-explained>

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Table of contents

Foreword	3
Introduction	6
1. Business dynamics	9
Size of businesses	10
Entrepreneurship	13
Research and development	18
Innovation	21
Digital transformation	24
2. Sectoral overview	27
3. Industry	35
Structure	36
Developments	39
Focus on high-tech industry	42
4. Construction	45
Structure	46
Developments	49
Focus on building construction	52
5. Distributive trades	55
Structure	56
Developments	60
6. Other non-financial services	65
Structure	66
Developments	70
Focus on information and communication services	75
7. Tourism	79
Structure	80
Seasonality	83

Introduction

[Eurostat](#) is the statistical office of the [European Union](#) (EU). Its mission is to provide high quality statistics for Europe, thereby offering key information on the EU's economy, society and environment that are needed by citizens and decision makers.

Key figures on European business describes the situation in the EU's business economy. [Short-term business statistics](#) and [tourism](#) statistics are generally presented through to the end of 2022, revealing the impact of COVID-19 and containment measures on the business economy, early impacts from the Russian military aggression against Ukraine and the related sanctions, and recent higher levels of inflation. [Structural business statistics](#) are now available for the 2020 reference year and so reflect the initial impact of the COVID-19 crisis.

Structure of the publication

Key figures on European business provides users of official statistics with an overview of the wealth of information that is available on Eurostat's [website](#) and within its [online databases](#) concerning the business economy.

The publication is divided into an overview for the whole of the business economy, a presentation of the structure of the business economy, four chapters focusing on separate parts of the business economy (industry, construction, distributive trades and other [non-financial services](#)), and a final chapter focusing on tourism.

Each of the four chapters focusing on different parts of the business economy starts with an overview of their structure. They continue with information on annual developments from 2000 or 2005 through until 2022 (the latest year for which annual [indices](#) are available at the time of writing). Three of these chapters also include information focused on a particular aspect: [high-tech](#) sectors and products for industry, [buildings](#) for construction, and information and communication services for other non-financial services.

Based on different data sources, the tourism chapter focuses on nights spent in tourist accommodation as well as nights booked through booking platforms.

Data extraction and coverage

Data extraction

The vast majority of statistical data presented in this publication were extracted in March 2023. The data in Chapter 7 pertaining to nights booked through booking platforms were extracted in April 2023. Eurostat's online database may contain revised data.

Spatial data coverage

This publication presents information for the EU (a sum/average covering the 27 Member States of the EU) as well as the individual EU Member States and EFTA countries. The order of the countries in the figures usually reflects their ranking according to the values for (one of) the indicator(s) illustrated.

References in the publication to EU Member States being in northern, eastern, southern or western Europe are based on groupings provided by [EU vocabularies](#).

The map on the inside cover page identifies the EU Member States and the EFTA countries, as well as pinpointing their capital cities.

Country codes and names

BE Belgium	HU Hungary
BG Bulgaria	MT Malta
CZ Czechia	NL Netherlands
DK Denmark	AT Austria
DE Germany	PL Poland
EE Estonia	PT Portugal
IE Ireland	RO Romania
EL Greece	SI Slovenia
ES Spain	SK Slovakia
FR France	FI Finland
HR Croatia	SE Sweden
IT Italy	
CY Cyprus	IS Iceland
LV Latvia	LI Liechtenstein
LT Lithuania	NO Norway
LU Luxembourg	CH Switzerland

Temporal data coverage

If data for a reference year (or [reference period](#)) are not available for a particular country, then efforts have been made to complete the coverage using data for recent previous reference years (these exceptions are footnoted).

Economic activity coverage

The [statistical classification of economic activities in the European Community](#) (NACE Rev. 2) is used to define [economic activities](#). Within this publication, the following terms related to a range of economic activities are applied – all based on the NACE Rev. 2 classification.

- All economic activities – Sections A to U.
- Business economy – covers (as defined by Sections B to N and Division 95): industry, construction, distributive trades and most other services.
- Non-financial business economy – covers (as defined by Sections B to J and L to N and Division 95): industry, construction, distributive trades and most other services outside of financial services.
- Core innovation activities – covers (as defined by Sections B to E, H, J, K and Divisions 46 and 71 to 73): industry; transportation and storage services; information and communication services; financial and insurance activities; wholesale trade; architectural and engineering activities, technical testing and analysis; scientific research and development; advertising and market research.
- Industry – covers (as defined by Sections B to E): mining and quarrying; manufacturing; electricity, gas, steam and air conditioning supply; water supply, sewerage, waste management and remediation activities.
- Manufacturing – Section C.
- High-tech manufacturing – covers (as defined by Divisions 21 and 26 and Group 30.3): the manufacture of basic pharmaceutical products and pharmaceutical preparations; the manufacture of computer, electronic and optical products; the manufacture of air and spacecraft and related machinery.
- Construction – covers (as defined by Section F): the construction of buildings; civil engineering; specialised construction activities.

- Non-financial services – covers (as defined by Sections G to J and L to N and Division 95): distributive trades and most other services outside of financial services.
- Non-financial services as used for short-term business statistics in Chapter 6 (section on 'Developments') – covers in general Sections H to J and L to N. Some activities are not covered, such as activities of head offices, scientific research and development, and veterinary activities.
- Other non-financial services – covers (as defined by Sections H to J and L to N and Division 95): most services outside of distributive trades and financial services.
- Core innovation services – covers (as defined by Sections H, J, K and Divisions 46 and 71 to 73): transportation and storage services; information and communication services; financial and insurance activities; wholesale trade; architectural and engineering activities, technical testing and analysis; scientific research and development; advertising and market research.
- Distributive trades – covers (as defined by Section G): wholesale and retail trade; repair of motor vehicles and motorcycles.
- Information and communication services – covers (as defined by Section J): publishing activities; motion picture, video and television programme production, sound recording and music publishing activities; programming and broadcasting activities; telecommunications; computer programming, consultancy and related activities; information service activities.
- Tourist accommodation – covers (as defined by Groups 55.1 to 55.3): hotels and similar accommodation; holiday and other short-stay accommodation; camping grounds, recreational vehicle parks and trailer parks.

For more information about the NACE Rev. 2 classification, please refer to: <https://ec.europa.eu/eurostat/web/nace/overview>.

Notes and flags

Notes and flags are means of explaining and defining specific characteristics of particular data. This publication includes only the main notes required for interpretation of the data and to highlight when a year has been replaced with another. Data that are not shown in individual figures may be simply not available or they may be confidential (in which case they are not published). A full set of notes and flags are available on Eurostat's website (see below) via the online data code(s).

Accessing European statistics

The simplest way to obtain Eurostat's wide range of statistical information is through its website (<https://ec.europa.eu/eurostat>). Eurostat provides users with free access to its databases and its publications. The website is updated daily and presents the latest and most comprehensive statistical information available on the EU, its Member States, the EFTA countries, as well as enlargement countries and potential candidates.

Eurostat online data codes, such as `sbs_na_sca_r2`, allow easy access to the most recent data on Eurostat's website (<https://ec.europa.eu/eurostat/data/database>). In this publication these online data codes are given as part of the source below each figure.

Some of the indicators presented in this publication are relatively complex. *Statistics Explained* provides a comprehensive online glossary with definitions for a broad range of statistical indicators, concepts and terms; it is organised under thematic headings (https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Thematic_glossaries).

1

Business dynamics



Size of businesses

Business statistics cover industry, construction, distributive trades and most other services. It is important to underline that they exclude a range of economic activities, such as: agriculture, forestry and fishing; public administration; education; health and social work; arts, entertainment and recreation. Alongside these, financial and insurance activities have traditionally been excluded, given their specific nature and the limited availability of statistics in this area.

Key business statistics for the non-financial business economy

(EU, 2020)



In 2020, there were 23.4 million enterprises in the EU's non-financial business economy. Collectively they employed 127.6 million people and created €6 496 billion of wealth as measured by value added at factor cost.

Note: the non-financial business economy covers industry, construction, distributive trades and most other market services outside of financial services.

Source: Eurostat (online data code: sbs_na_sca_r2)

Key business statistics in the non-financial business economy

(%, share for each enterprise size class, EU, 2020)

Data relating to enterprises that are **active** within the non-financial business economy can be presented according to enterprise size and measured in terms of the number of persons they employ. In 2020, the overwhelming majority (99.0 %) of EU businesses were **micro** or **small** enterprises employing fewer than 50 persons. Their economic weight was lower in terms of their contribution to employment or value added: micro and small enterprises employed just under half (48.5 %) of the EU's non-financial business economy workforce, while they contributed just over one third (35.4 %) of the value added.

In 2020, there were 42 000 **large** enterprises (with 250 or more persons employed) in the EU's non-financial business economy. These large enterprises represented just 0.2 % of the total number of enterprises. However, their economic weight was considerably greater: large enterprises employed more than one third (35.7 %) of the EU's non-financial business economy workforce and generated an even higher share of its wealth (47.5 % of value added).

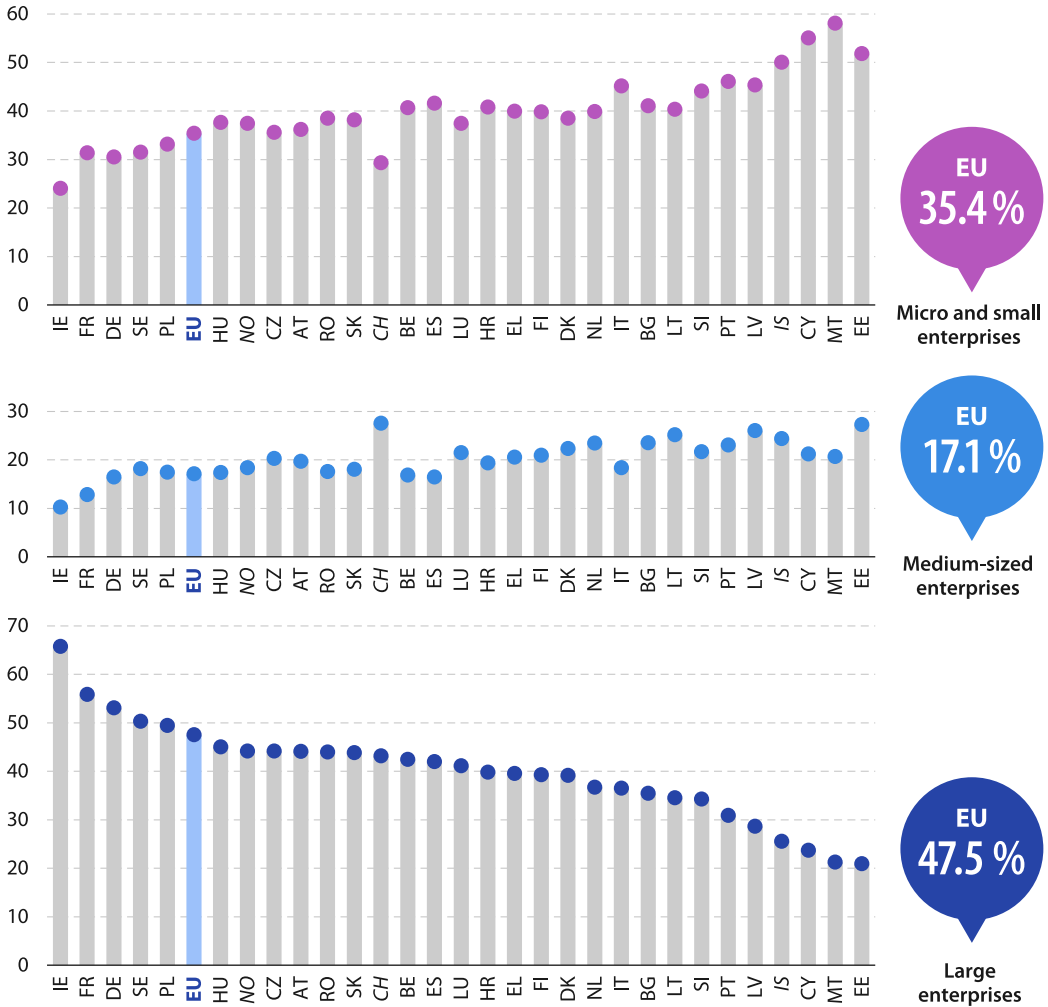


Note: the shares do not sum to 100.0 % due to rounding. Estimates made for the purpose of this publication.

Source: Eurostat (online data code: [sbs_sc_sca_r2](#))

Value added in the non-financial business economy

(%, share of the total value added for each enterprise size class, 2020)



Note: ranked on the share for large enterprises. RO: 2019. PT: excluding real estate activities. CY: excluding electricity, gas, steam and air conditioning supply, and real estate activities. AT: excluding mining and quarrying, electricity, gas, steam and air conditioning supply, real estate activities and repair of computers and personal and household goods.

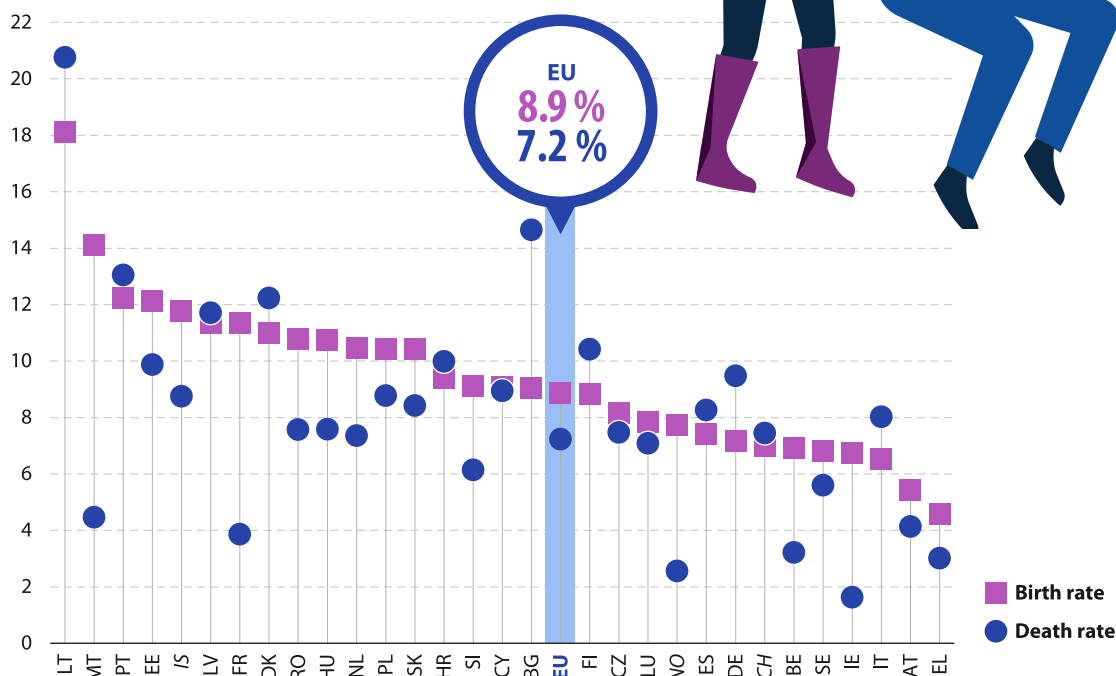
Source: Eurostat (online data code: [sbs_sc_sca_r2](#))

In 2020, micro and small enterprises contributed more than half of the value added in the non-financial business economies of the island Member States of Malta and Cyprus, as well as in Estonia. By contrast, large enterprises were responsible for approximately half of value added in the non-financial business economies of Poland and Sweden, 53.1 % in Germany and 55.8 % in France; this share peaked at 65.7 % in Ireland.

Entrepreneurship

Enterprise birth and death rates in the business economy

(%, 2020)



Business demography is a term used for studying the characteristics of the population of enterprises. The creation (or **birth**) of new enterprises and the closure (or **death**) of enterprises are important indicators for business dynamics.

Note: excluding the activities of holding companies (NACE Rev. 2 Group 64.2). EL and CH: death rate, 2019.

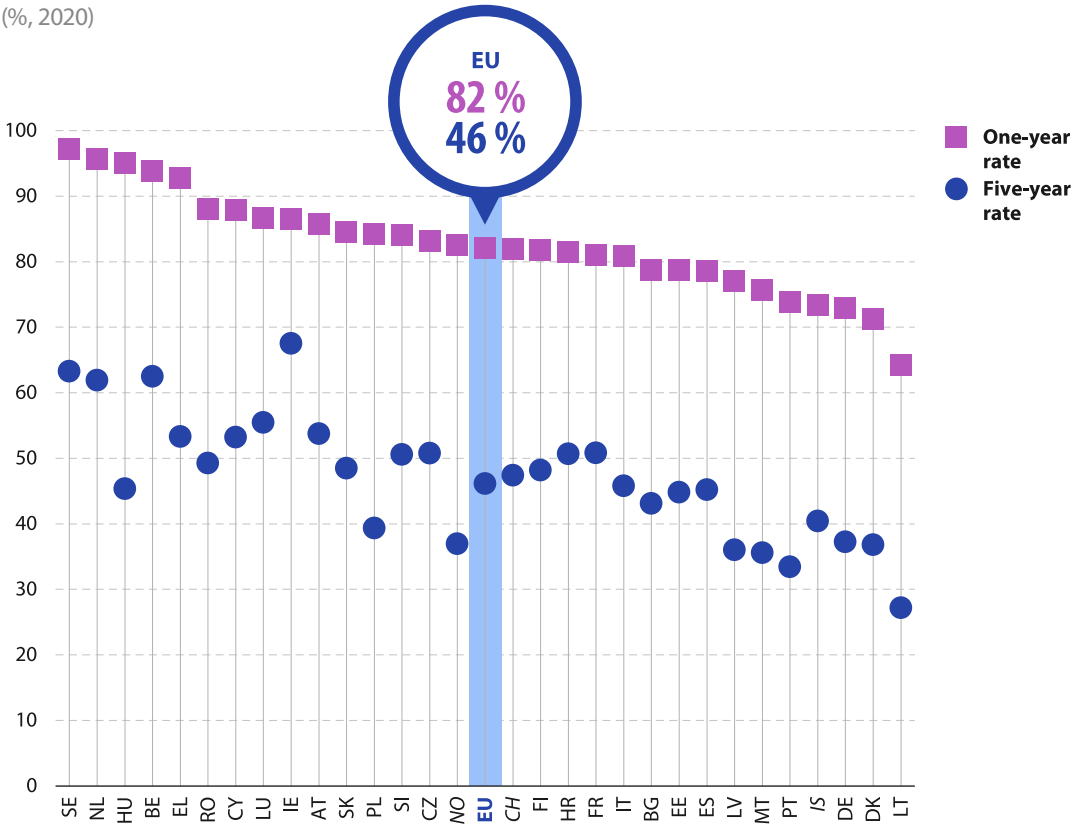
Source: Eurostat (online data code: [bd_9ac_l_form_r2](#))

In 2020, the EU **enterprise birth rate** (as measured by the number of births as a percentage of the number of active enterprises) in the business economy was 8.9%. This ratio ranged from highs of 18.1% in Lithuania down to 4.6% in Greece.

Enterprise deaths concern the permanent closure of an enterprise. The information shown here therefore excludes changes resulting from mergers, take-overs, break-ups or other forms of restructuring such as a change of activity. In 2020, the preliminary **enterprise death rate** in the EU's business economy was 7.2%, ranging from highs of 20.8% in Lithuania down to a low of 1.6% in Ireland. As such, the death rate in 2020 was lower than in 2019 (when it had been 8.1%), reflecting the impact of the COVID-19 crisis.

Enterprise survival rates in the business economy

(%, 2020)



Note: excluding the activities of holding companies (NACE Rev. 2 Group 64.2). IE: one-year rate, 2018. DE: one-year rate reflects a break in series. MT: rates reflect a break in series.

Source: Eurostat (online data code: [bd_9bd_sz_cl_r2](#))

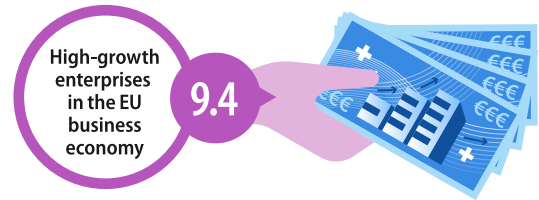
While business dynamics are important for the overall performance of an economy, individual entrepreneurs are more likely to be concerned by the **survival** and development of their business. In 2020, four out of every five enterprises born in the previous year in the EU's business economy had survived their first year: the one-year **survival rate** was 82 %. This rate was particularly high in Sweden (97 % of newly-born enterprises survived one year), the Netherlands (96 %), Hungary (95 %), Belgium (94 %) and Greece (93 %). By contrast, 64 % of new enterprises in Lithuania survived their first year.

The EU five-year survival rate for enterprises born in 2015 and still active in 2020 was 46 %; in other words, slightly less than half of all newly-born enterprises from the 2015 **cohort** survived until 2020. Five-year enterprise survival rates were less than 50 % for a majority of the EU Member States, with the lowest rate recorded in Lithuania (27 %). The highest rates were in Ireland (68 %), Belgium and Sweden (both 63 %), followed by the Netherlands (62 %).



High-growth enterprises

(%, share of the total number of enterprises in each activity, EU, 2020)



Enterprise creation and subsequent business growth can potentially have a considerable impact on employment.

In 2020, **high-growth enterprises** accounted for 9.4 % of all enterprises in the EU's business economy. These enterprises were particularly common in the information and communication sector (17.0 %). At the other end of the range, accommodation and food service activities had the lowest proportion of high-growth enterprises (6.1 %).

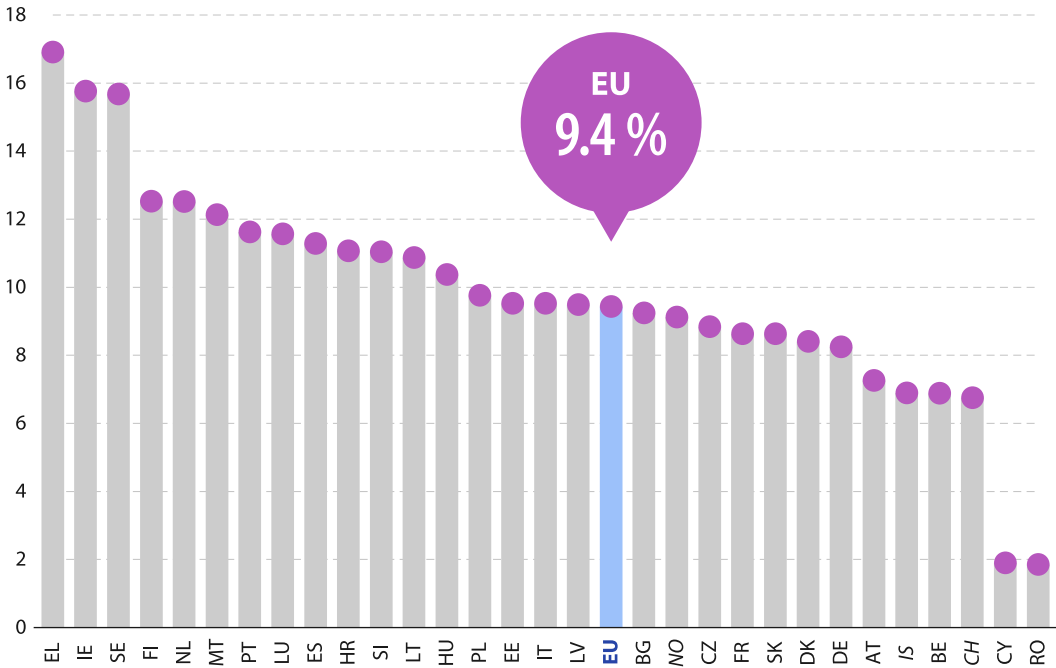
Note: a high-growth enterprise is defined within business demography statistics as one that had at least 10 employees at the beginning of the period studied and whose number of employees grew, on average, by more than 10 % per year over a three-year period. Data for the business economy exclude the activities of holding companies (NACE Rev. 2 Group 64.2). Electricity, gas, steam and air conditioning supply: 2019.

Source: Eurostat (online data code: [bd_9pm_r2](#))

High-growth enterprises

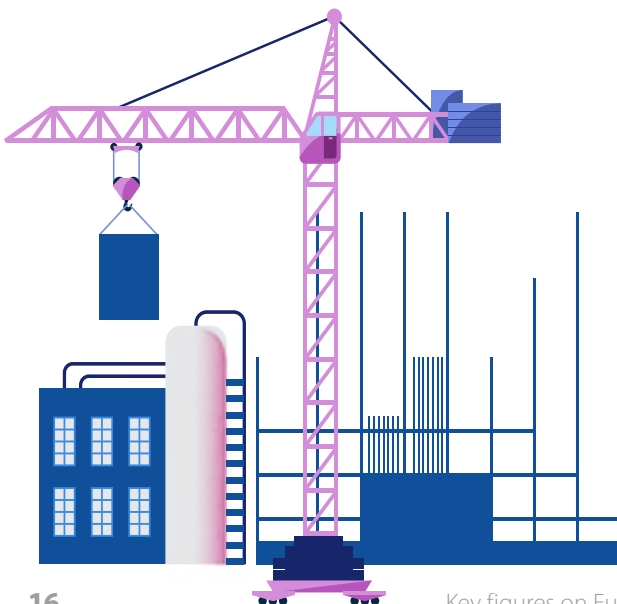
(%, share of the total number of enterprises in the business economy, 2020)

In 2020, high-growth enterprises accounted for around one in six of all enterprises in the business economies of Greece (2018 data), Ireland (2018 data) and Sweden. There were 14 EU Member States where high-growth enterprises accounted for less than 1 in 10 enterprises, with particularly low shares observed in Cyprus and Romania (both 1.9 %).



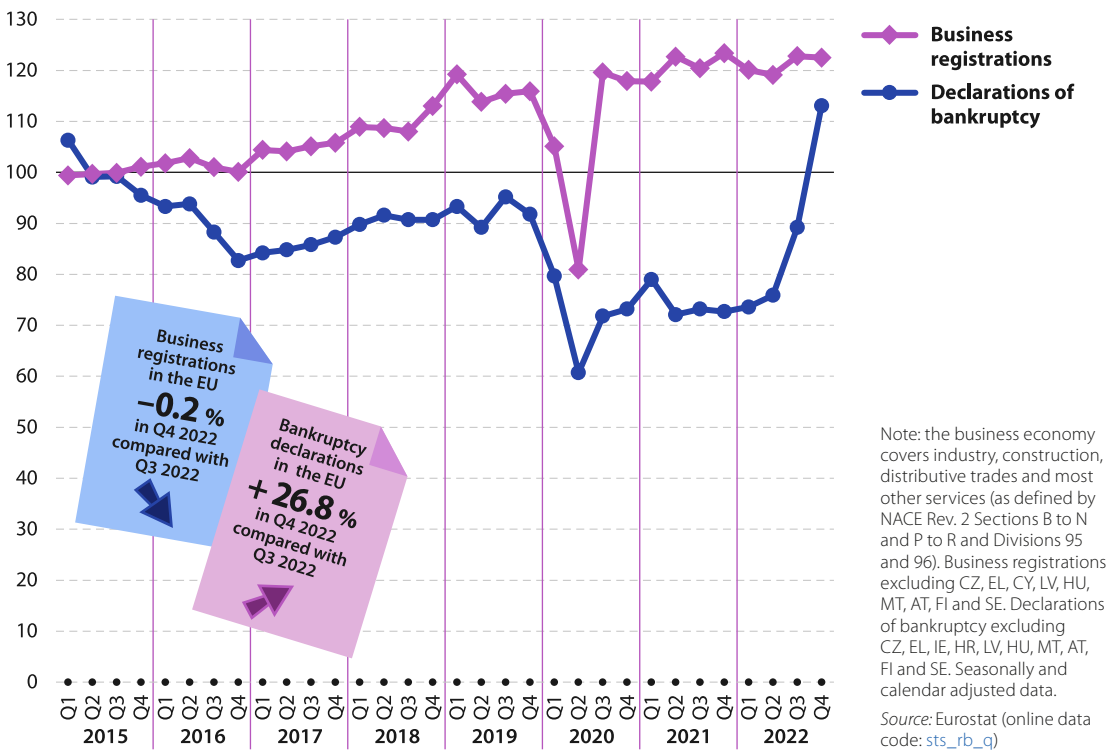
Note: see earlier for the definition of a high-growth enterprise. Excluding the activities of holding companies (NACE Rev. 2 Group 64.2). IE and EL: 2018. CH: 2017.

Source: Eurostat (online data code: [bd_9pm_r2](#))



Business registrations and declarations of bankruptcy in the business economy

(2015 = 100, EU, Q1 2015–Q4 2022)



In contrast to data for enterprise births, business registrations are an administrative procedure that may be considered as a declaration of intent. Between the start of 2015 and the end of 2019, there was a relatively stable upward trend for the number of business registrations in the EU. This pattern ended abruptly in the first quarter of 2020 when the impact of the COVID-19 pandemic and related containment measures contributed to a fall; an even sharper fall was recorded in the second quarter of 2020. In the third quarter of 2020, the number of business registrations returned above the level recorded at the end of 2019. Thereafter, the development through to the end of 2022 was similar to that before the crisis.

Bankruptcy declarations provide an early signal for the direction the economy will be taking. Some businesses that file for bankruptcy may be sold off and hence they do not necessarily close permanently, in contrast to the situation for an enterprise death. Having fallen between the start of 2015 and the end of 2016, the number of bankruptcy declarations in the EU increased moderately

for three years. In the first quarter of 2020, the first impact of the pandemic and containment measures was felt. As for business registrations, the number of bankruptcy declarations fell quite sharply in the first quarter of 2020 and more strongly in the second one. Despite increasing in the third quarter of 2020 and remaining relatively stable through until the second quarter of 2022, the number of bankruptcy declarations was still clearly below the level recorded at the end of 2019. The number of bankruptcy declarations increased quite sharply in the third quarter of 2022 and more strongly in the fourth one, reaching a new peak for the whole period studied.

For more and updated information on business registrations and declarations of bankruptcy please refer to the [Statistics Explained article](#).

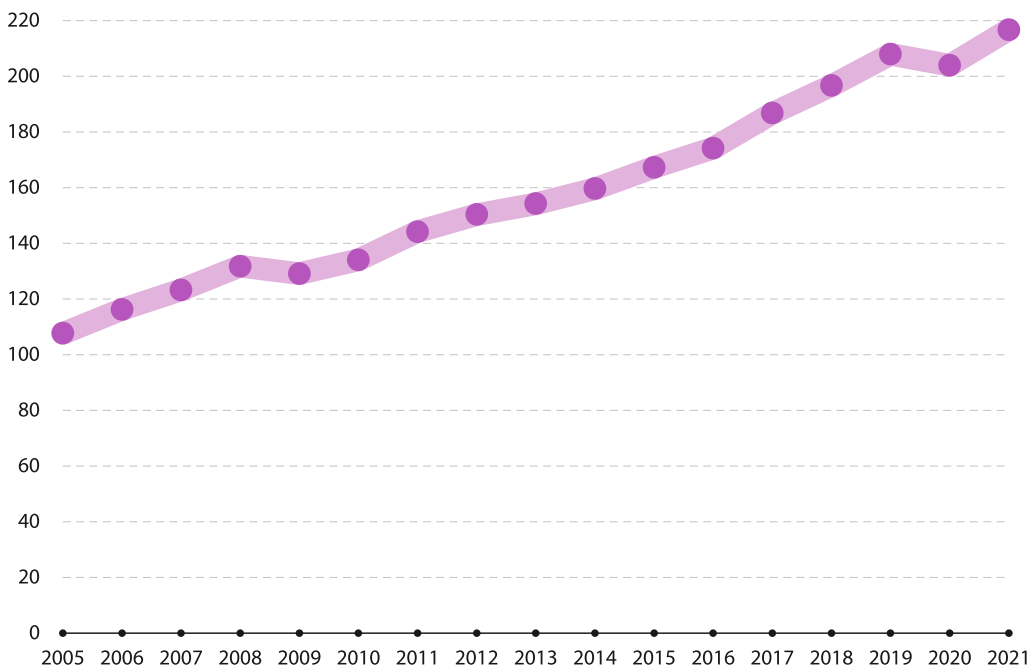
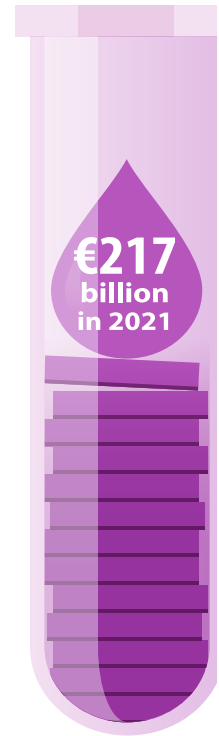


Research and development

Business expenditure on R&D

(€ billion, EU, 2005–2021)

Business expenditure on R&D is a measure of **intramural R&D**. In contrast to global competitors such as Japan or the United States, business expenditure on R&D is relatively low in the EU. That said, the **business enterprise sector** usually accounts for the highest share of **gross domestic expenditure on R&D** when compared with the **higher education, government** and **private non-profit** sectors. Other than slight reductions in 2009 and 2020, EU business expenditure on R&D rose consistently (in current price terms) between 2005 and 2021. Overall, business expenditure on R&D approximately doubled between 2005 and 2021, reaching €217 billion.

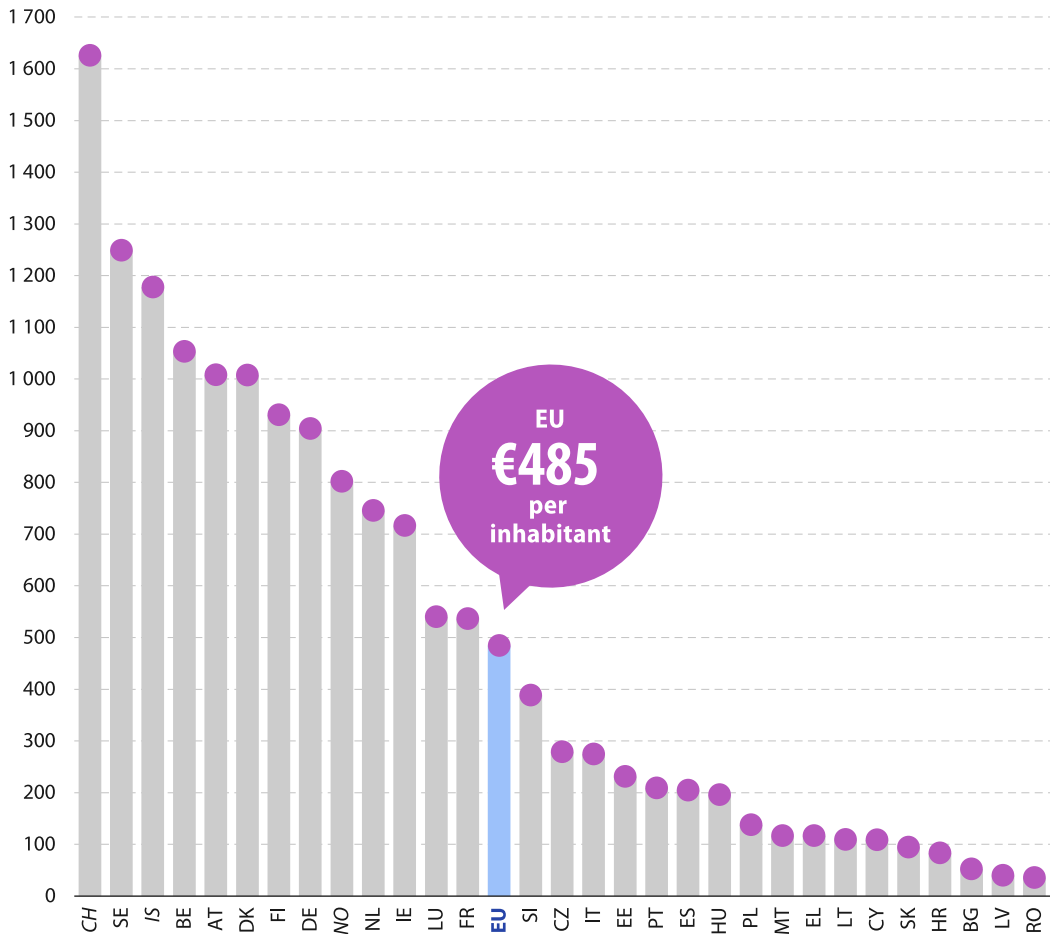


Note: business expenditure across all economic activities.

Source: Eurostat (online data code: [rd_e_berdindr2](#))

Business expenditure on R&D

(€ per inhabitant, 2021)



Note: business expenditure across all economic activities. CH: 2019.

Source: Eurostat (online data code: [rd_e_berdindr2](#))

Sweden, Belgium, Austria, Denmark, Finland and Germany had the highest rates of business R&D expenditure per inhabitant in the EU in 2021, alongside the highest overall levels of R&D intensity (R&D expenditure relative to GDP).

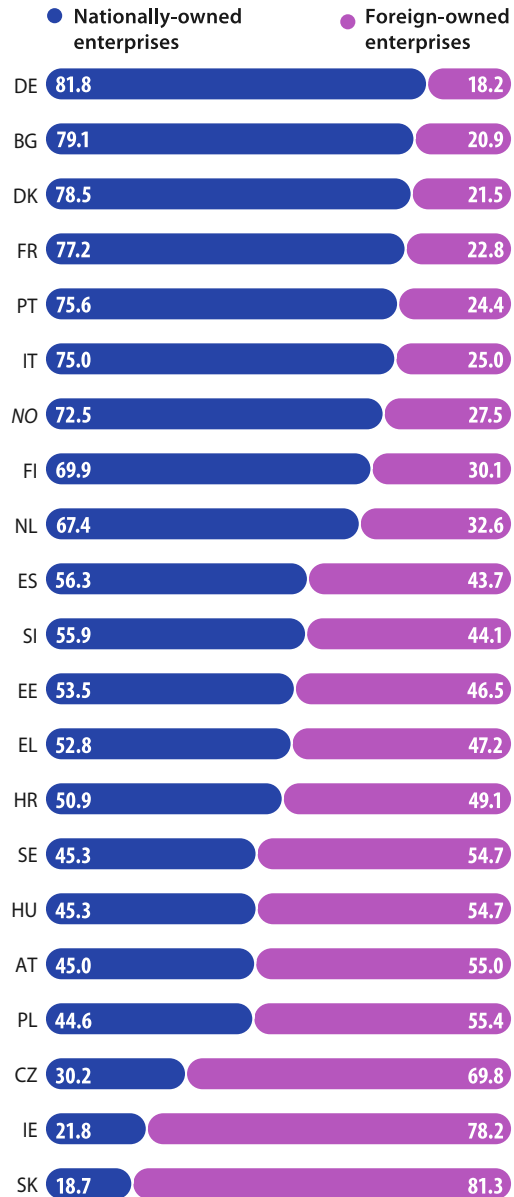
Business enterprise expenditure on R&D in the EU averaged €485 per inhabitant in 2021. This ratio stood at €1 249 per inhabitant in Sweden but was less than €200 per inhabitant in 11 of the EU Member States; the lowest ratios were in Bulgaria, Latvia and Romania.

Intramural R&D expenditure in industry and construction

(%, share of the total intramural expenditure according to the control of the enterprise, 2019)

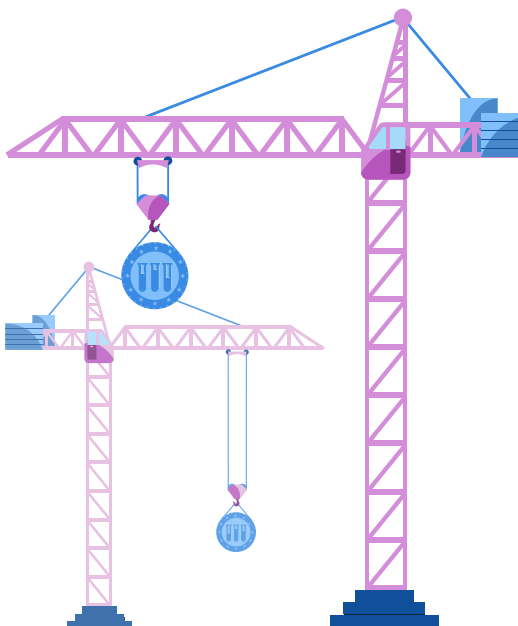
Part of the globalisation phenomenon observed in recent decades has been the growing internationalisation of R&D expenditure. This can have benefits for host economies as well as for [multinational enterprises](#) that perform research [abroad](#), especially in terms of a transfer of knowledge.

Within industry and construction, foreign-owned enterprises performed more than half of all intramural R&D expenditure in 2019 in seven of the EU Member States, namely, Sweden, Hungary, Austria, Poland, Czechia, Ireland and Slovakia. At the other end of the range, almost four fifths of intramural R&D expenditure in industry and construction was performed by nationally-owned enterprises in Denmark and Bulgaria, with an even higher share in Germany (81.8 %).



Note: intramural R&D expenditures are all current expenditures plus gross fixed expenditure for R&D performed within an enterprise. EE, NL and SI: 2017. BE, CY, LV, LT, LU, MT and RO: not available.

Source: Eurostat (online data code: fats_g1a_rd)



Innovation

Innovation active enterprises

(EU, 2020)



Note for all indicators on pages 21 to 23: based on core innovation activities; covers enterprises with 10 or more persons employed; innovation active enterprises include those with on-going and abandoned innovative activities, regardless of whether or not the activity results in the implementation of an innovation.

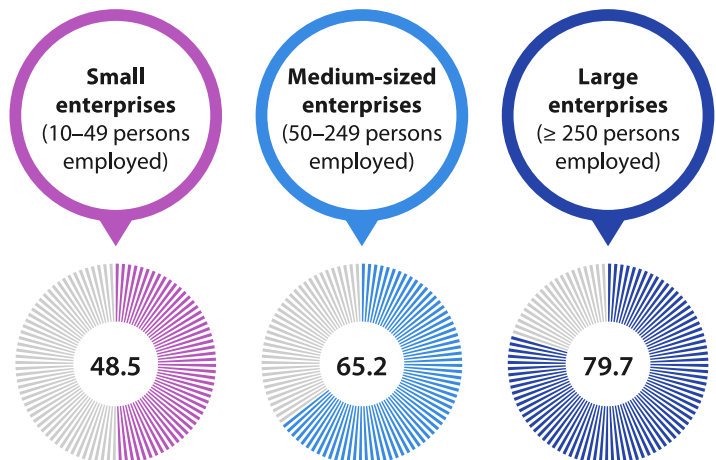
Source: Eurostat (online data code: [inn_cis12_bas](#))

The [community innovation survey \(CIS\)](#) focuses on the [innovation activities](#) of enterprises. It concentrates on a set of core innovation activities and only covers enterprises with 10 or more persons employed. In 2020, there were 732 600 enterprises across the EU in this target population, of which just over half (385 900) were [innovation active](#).

Innovation active enterprises

(%, share of enterprises that are innovation active for each enterprise size class, EU, 2020)

In 2020, across core innovation activities around four fifths of all large enterprises (with 250 or more persons employed) in the EU engaged in some form of innovative activity. By contrast, less than half of all small enterprises (with 10–49 persons employed) were engaged in some form of innovation.



Note: see the note at the top of this page.

Source: Eurostat (online data code: [inn_cis12_bas](#))

Innovation active enterprises

(%, share of enterprises that are innovation active for each activity, 2020)

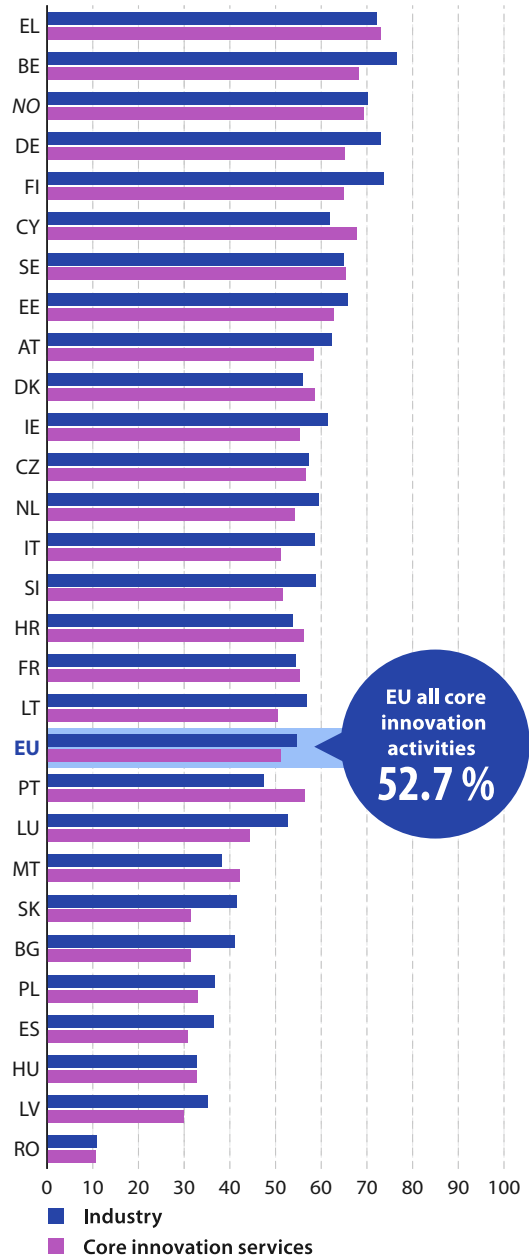
Across the EU, there appeared to be little difference between the share of enterprises within industry (54.5 %) and core innovation services (51.0 %) that were engaged in innovation during 2020.

In 2020, the proportion of industrial enterprises that were innovators peaked at 76.5 % in Belgium, while Finland, Germany and Greece were the only other EU Member States to record shares of more than two thirds. By contrast, the lowest shares were recorded in Hungary (32.7 %) and Romania (10.8 %).

The proportion of innovators among enterprises classified to core innovation services was highest in 2020 at 72.9 % in Greece. The next highest shares – all within the range of 63–68 % – were recorded in Belgium, Cyprus, Sweden, Germany, Finland and Estonia.

Note: see the note at the top of page 21. Ranked on the share for industry and core innovation services together.

Source: Eurostat (online data code: [inn_cis12_inact](#))



EU all core innovation activities
52.7 %



Persons employed working in innovation active enterprises

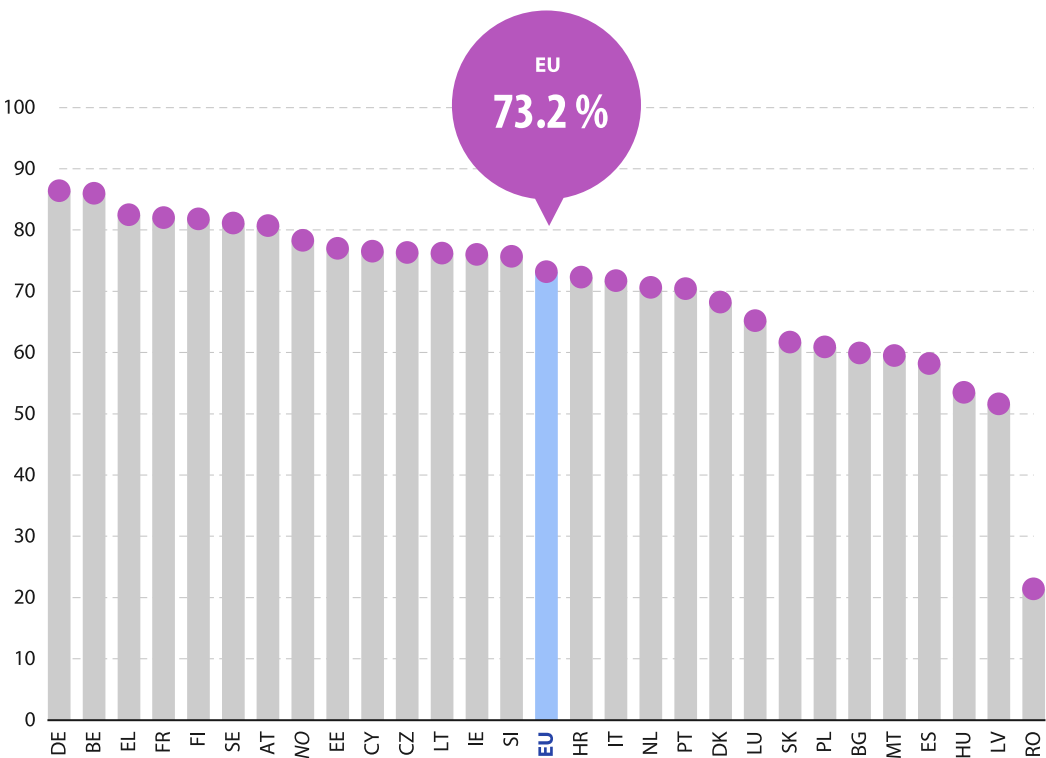
(%, share of all persons employed, 2020)

The proportion of persons employed working in innovative enterprises reflects, at least to some degree, the specialisation and concentration of particular economic activities and the size structure of enterprises within each economy: larger enterprises tend to have a greater propensity to be innovators.

Across core innovation activities, more than 80.0 % of persons employed in 2020 in Germany, Belgium, Greece, France, Finland, Sweden and Austria worked for an enterprise engaged in some form of innovation activity. In all but one of the remaining EU Member States, more than half of all persons employed worked for an innovative enterprise. The exception was Romania, where just over one fifth of all persons employed were in innovative enterprises.

Note: see the note at the top of page 21.

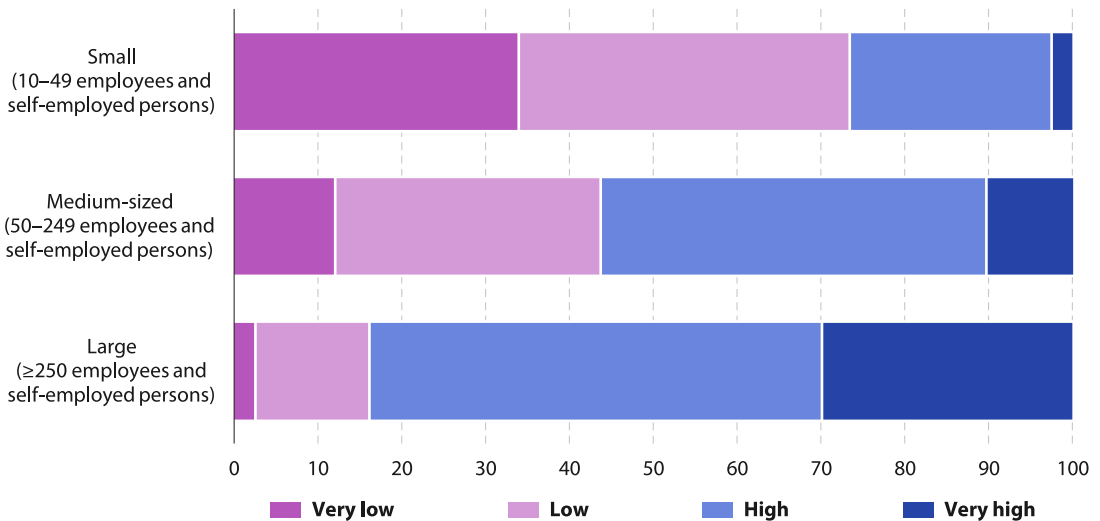
Source: Eurostat (online data code: [inn_cis12_bas](#))



Digital transformation

Digital intensity of enterprises

(%, share within each enterprise size class, EU, 2022)



The digital intensity index is a composite indicator based on 12 variables, each having a score of one point. This index is used to distinguish four levels of digital intensity for each enterprise: very low, low, high and very high. The 12 variables relate to using information and communication technologies (ICT) and include, for example, conducting remote meetings, implementing at least three ICT security measures, and using industrial or service robots.

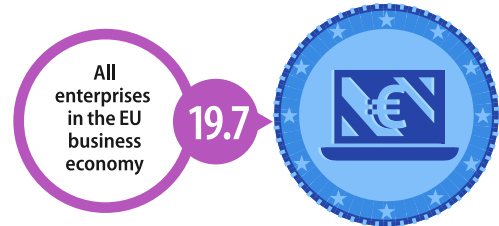
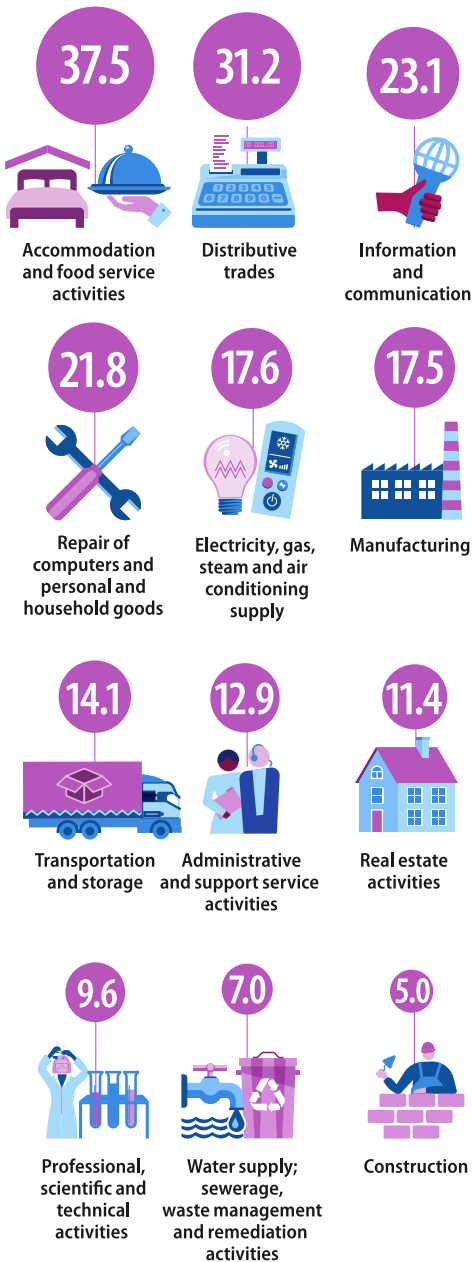
Close to three quarters (73.6 %) of small enterprises (with 10–49 employees and self-employed persons) in the EU had a very low or low digital intensity in 2022, compared with more than two fifths (43.9 %) of medium-sized enterprises (50–249 employees and self-employed persons) and one sixth (16.3 %) of large enterprises (250 or more employees and self-employed persons). By contrast, 29.7 % of large enterprises had a very high digital intensity, compared with 10.2 % of medium-sized enterprises and 2.3 % of small enterprises.

Note: covers enterprises with 10 or more employees and self-employed persons in NACE Rev. 2 Sections C to J and L to N and Group 95.1.

Source: Eurostat (online data code: [isco_e_dii](#))

Enterprises with e-commerce sales of at least 1 % of their turnover

(%, share within each economic activity, EU, 2021)



E-commerce sales include sales of products by enterprises – regardless of whether to other businesses, households, individuals, governments, public or private organisations – through electronic transactions conducted via the internet or other computer-mediated networks. The term covers the ordering of products over computer networks (other than by manually typed e-mails); the payment and delivery of the products may be either on- or off-line.

In 2021, one fifth (19.7 %) of enterprises (with at least 10 employees and self-employed persons) in the EU had e-commerce sales of at least 1 % of their turnover. The highest share of enterprises with e-commerce sales was observed in accommodation and food service activities, at 37.5 %. Distributive trades (31.2 %), information and communication services (23.1 %) recorded the next highest shares of enterprises making e-commerce sales. The lowest share was observed for construction (5.0 %).

Note: covers enterprises with 10 or more employees and self-employed persons in NACE Rev. 2 Sections C to J and L to N and Group 95.1.

Source: Eurostat (online data code: isoc_ec_eseln2)

2

Sectoral overview



This chapter presents an overview of the structure and performance of the EU's non-financial business economy. The subsequent chapters provide more detailed presentations.

Largest and second largest activities within the non-financial business economy

(EU, 2020)



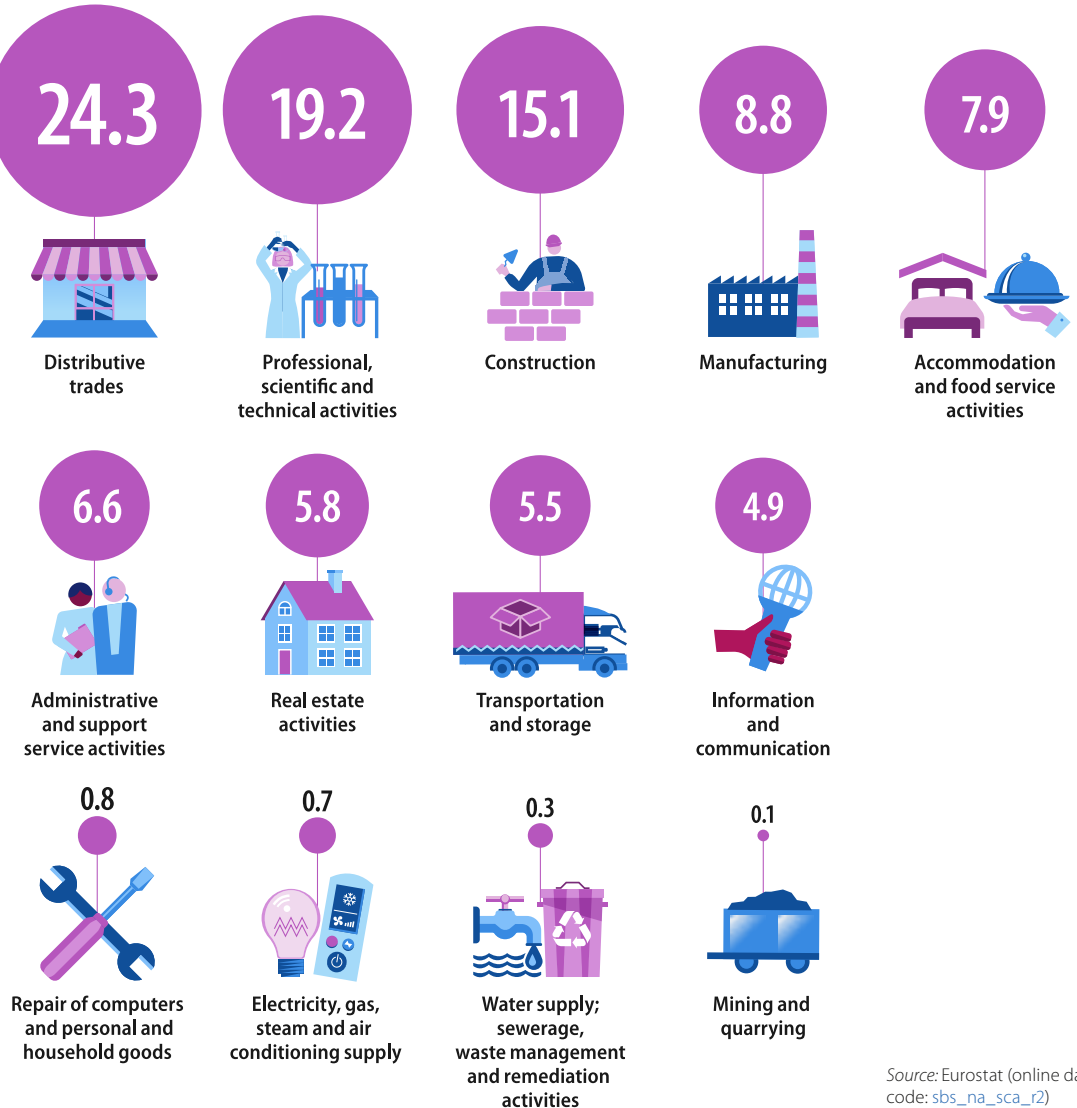
In 2020, the largest number of enterprises in the EU was recorded within the economic activity of distributive trades (5.7 million); approximately one in four enterprises within the EU's non-financial business economy had a distributive trade as their principal activity. Distributive trades employed 29.2 million persons and recorded €1.26 trillion of value added; these were the second highest values behind manufacturing, which had 29.4 million persons in employment and €1.88 trillion of value added.

Note: the largest and second largest activities are based on NACE Rev. 2 sections.

Source: Eurostat (online data code: sbs_na_sca_r2)

Distribution of enterprises within the non-financial business economy

(%, share of the total number of enterprises, EU, 2020)



Source: Eurostat (online data code: sbs_na_sca_r2)

There were considerably more enterprises active within distributive trades (24.3 % of the total) than within any other sector of the EU's non-financial business economy in 2020. Indeed, there were only two other sectors that recorded double-digit shares of the total: professional, scientific and technical activities (a 19.2 % share of the total number of enterprises) and construction (15.1 %).

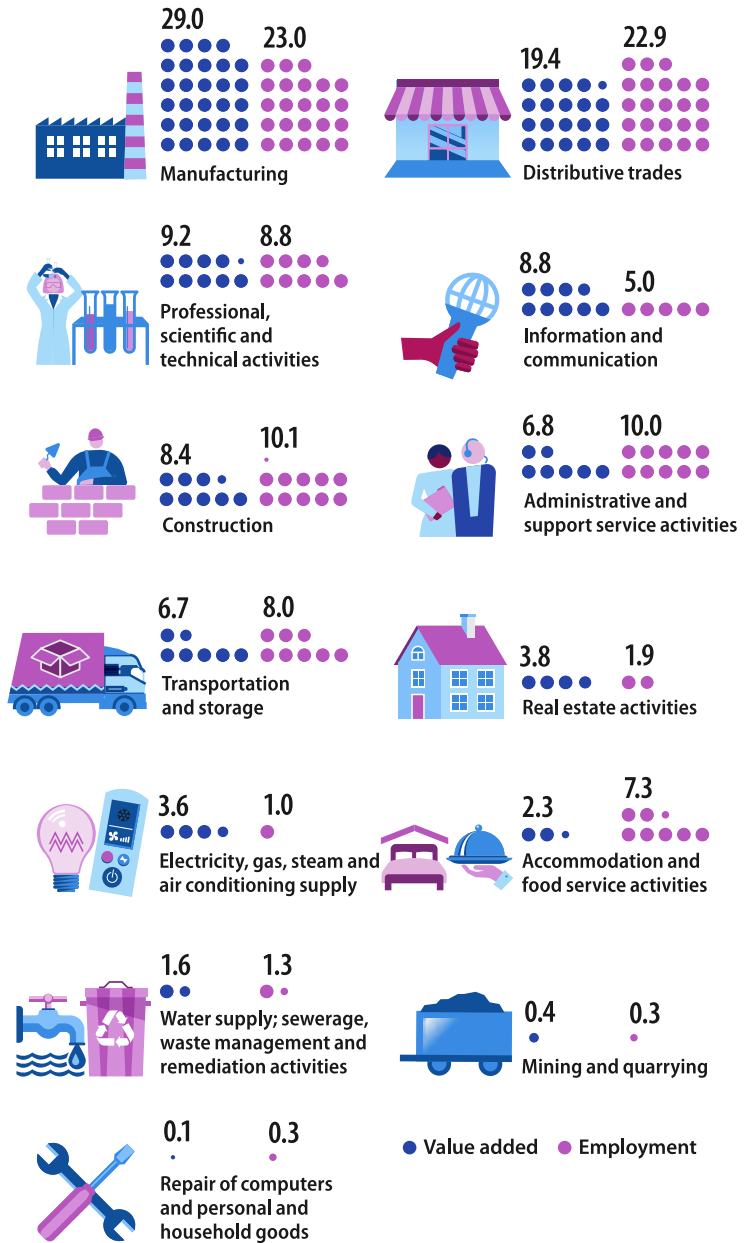
At the other end of the range, there were four activities which each contributed less than 1.0 % of the total number of enterprises in the EU's non-financial business economy in 2020: the repair of computers and personal and household goods (0.8 %); electricity, gas, steam and air conditioning supply (0.7 %); water supply; sewerage, waste management and remediation activities (0.3 %); and mining and quarrying (0.1 %).

Value added and employment within the non-financial business economy

(%, share of total value added and the total number of persons employed, EU, 2020)

In 2020, some 29.0 % (or €1.9 trillion) of the added value in the EU's non-financial business economy was contributed by the manufacturing sector. This was considerably greater than the second highest share, recorded for distributive trades (19.4 %), which in turn was much greater than the share registered for professional, scientific and technical activities (9.2 %).

More than one fifth of all persons employed in the EU's non-financial business economy in 2020 were employed in each of manufacturing (23.0 %) and distributive trades (22.9 %). Construction and administrative and support service activities – which are relatively labour-intensive – each employed one tenth of the non-financial business economy total; these were the only other sectors to reach a double-digit share.

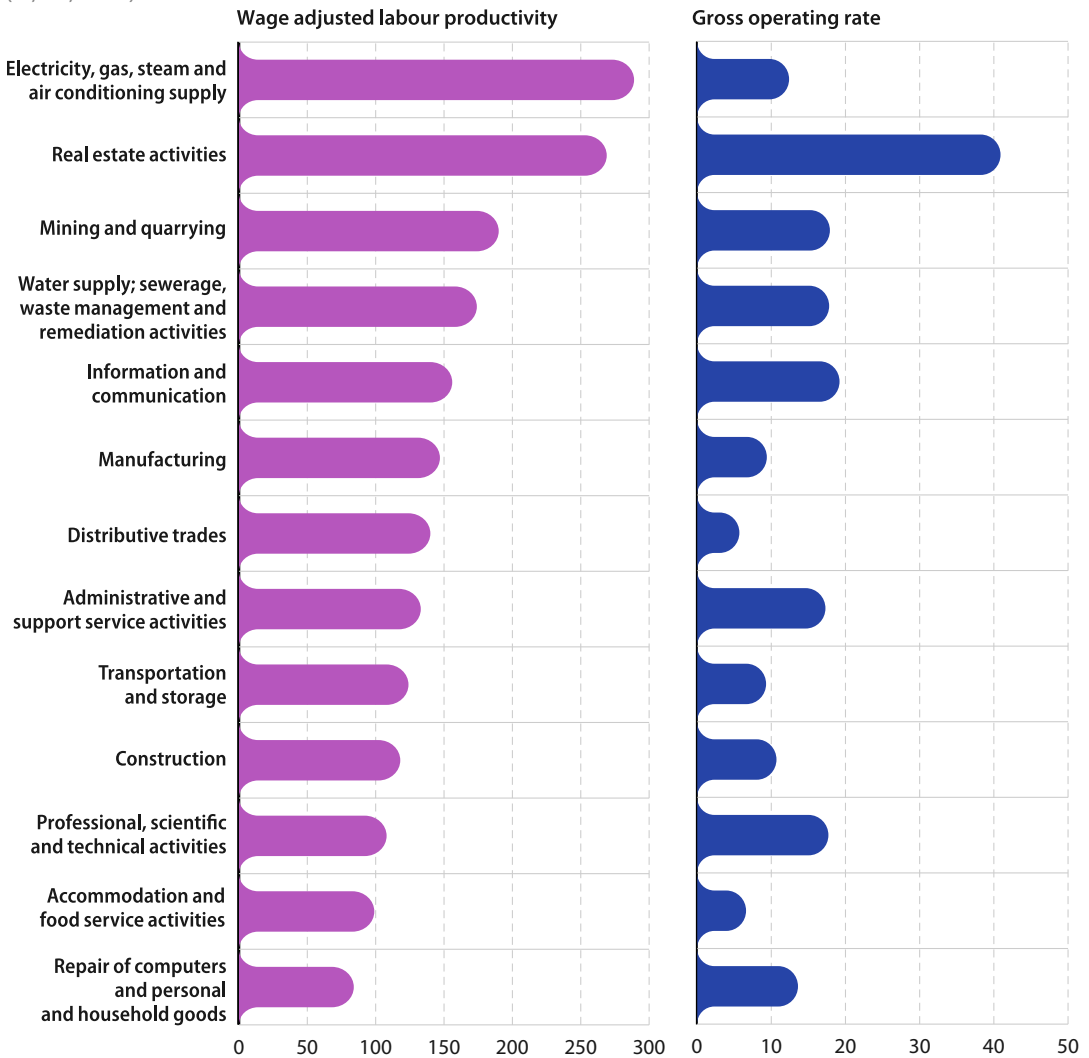


Note: the shares do not sum to 100.0 % due to rounding.

Source: Eurostat (online data code: sbs_na_sca_r2)

Productivity and performance within the non-financial business economy

(%, EU, 2020)



The [wage-adjusted labour productivity ratio](#) is defined as value added divided by [personnel costs](#) (subsequently adjusted by the share of [\(paid\) employees](#) in the total number of persons employed). The highest wage-adjusted labour productivity ratio in the EU's non-financial business economy in 2020 was recorded for the capital-intensive activity of electricity, gas, steam and air conditioning supply: [value added per person employed](#) in this activity was nearly three times as high as [average personnel costs per employee](#). At the other end of the range, there were two

activities in the EU where value added per person employed did not cover average personnel costs per employee in 2020: accommodation and food service activities (99 %); the repair of computers and personal and household goods (84 %).

The [gross operating rate](#) is a measure of profitability and is defined as value added at factor cost minus personnel costs (the [gross operating surplus](#)) divided by total [turnover](#). In 2020, the highest gross operating rate across the EU's non-financial business economy was recorded for real estate activities (40.9 %) and the lowest for distributive trades (5.7 %).

Note: different scales are used for the two indicators in the chart.

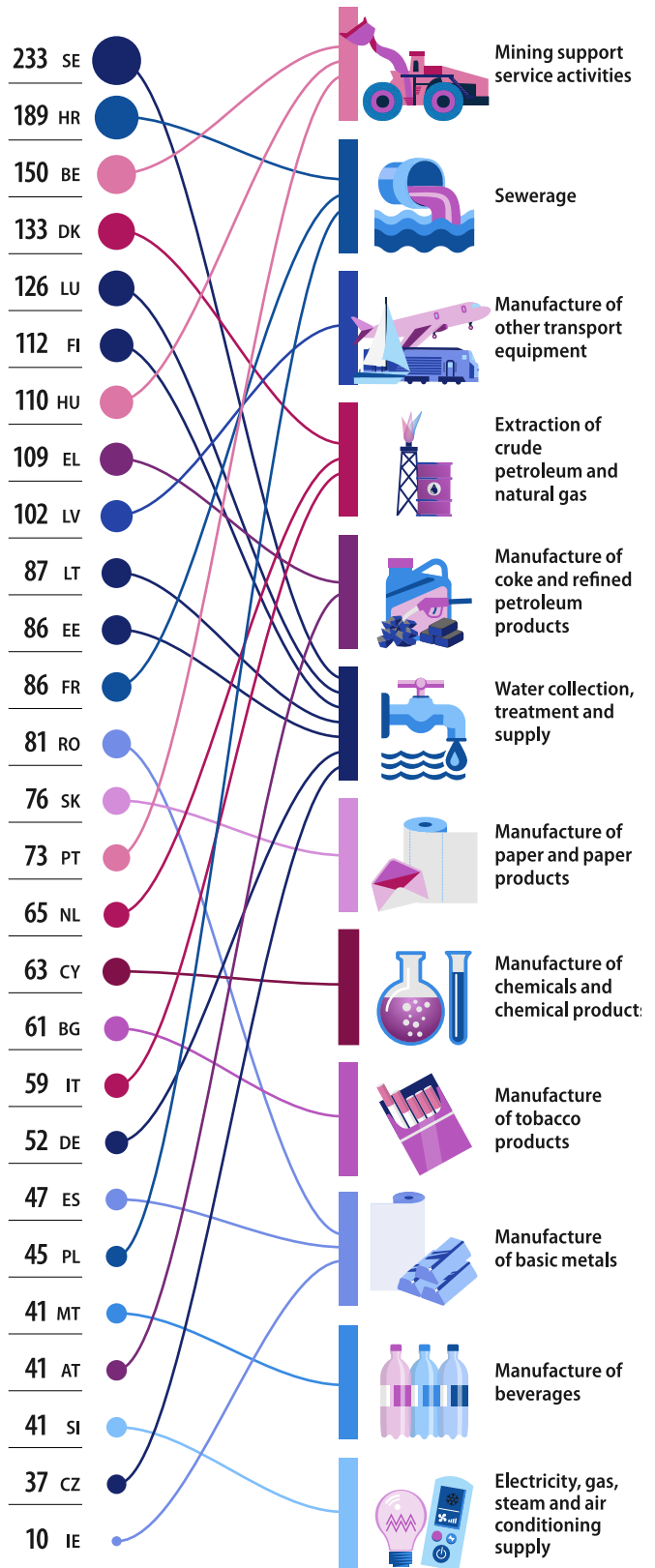
Source: Eurostat (online data code: [sbs_na_sca_r2](#))

Industrial activities in which EU Member States recorded their highest investment rates

(%, 2020)

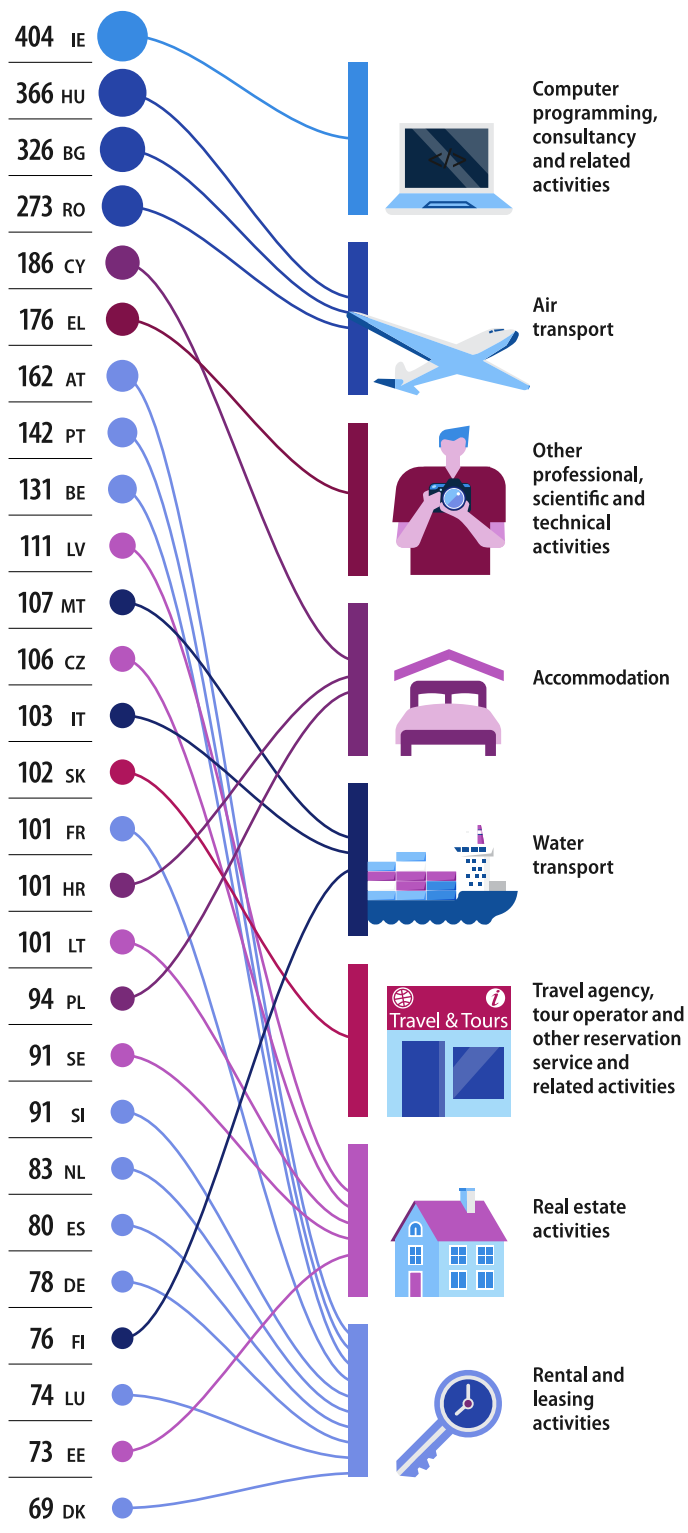
The investment rate is defined as **gross investment in tangible goods** divided by value added at factor cost. Some of the highest investment rates in 2020 were recorded for capital-intensive activities. This was particularly the case for: water collection, treatment and supply; sewerage; mining support service activities; and the extraction of crude petroleum and natural gas.

Across the EU Member States, the highest investment rate among industrial activities in 2020 was recorded in Sweden for water collection, treatment and supply (233 %), followed by Croatia for sewerage (189 %).



Note: the highest investment rates for industrial activities are based on NACE Rev. 2 divisions. For nearly all EU Member States, some NACE Rev. 2 divisions are confidential.

Source: Eurostat (online data code: sbs_na_sca_r2)



Non-financial service activities in which EU Member States recorded their highest investment rates

(%, 2020)

Among the divisions that compose non-financial services, more than one in three EU Member States recorded their highest investment rate in 2020 for rental and leasing activities. However, the highest investment rates among non-financial services were recorded in Ireland for rental and leasing activities. However, the highest investment rates among non-financial services were recorded in Ireland for computer programming, consultancy and related activities (404 %; 2019 data) and for air transport in Hungary (366 %), Bulgaria (326 %) and Romania (273 %).

Note: the highest investment rates for non-financial service activities are based on NACE Rev. 2 divisions. For nearly all EU Member States, some NACE Rev. 2 divisions are confidential. IE: 2019.
Source: Eurostat (online data code: sbs_na_sca_r2)

3

Industry



Structure

The EU's industrial economy is covered by four economic activities: mining and quarrying; manufacturing; electricity, gas, steam and air conditioning supply; and water supply, sewerage, waste management and remediation activities. Manufacturing was by far the largest of these four activities: in 2020, it accounted for more than four fifths (83.8 %) of industrial value added in the EU and for an even higher share of industrial employment (89.9 %).

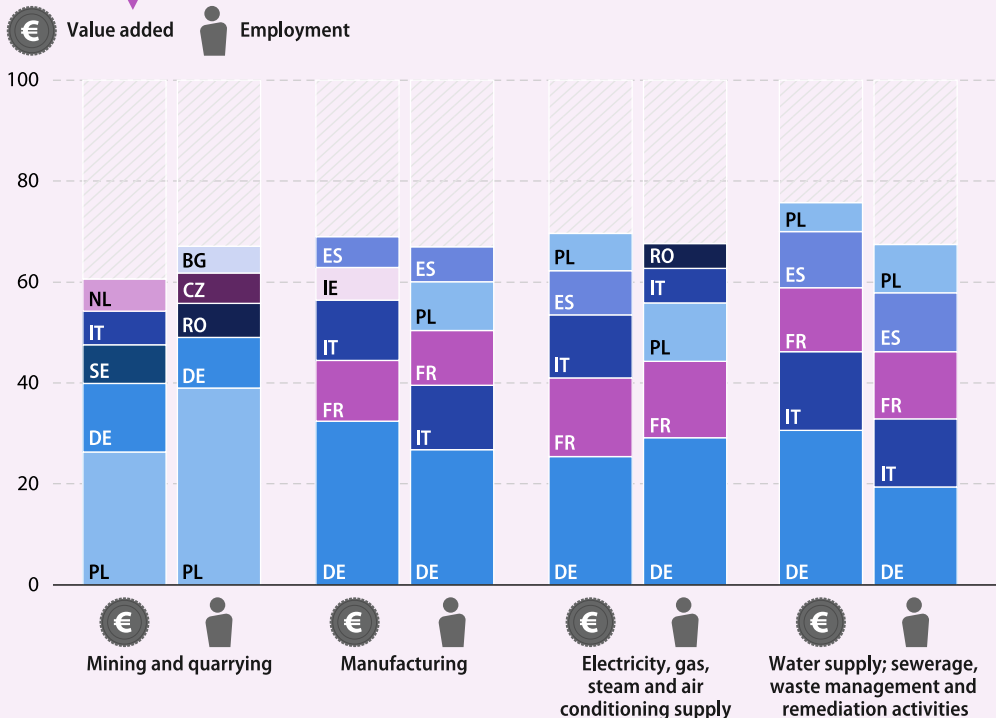
Concentration of industrial activity – top five EU Member States

(%, share of EU employment and value added for each activity, 2020)

EU industrial activities in 2020
2.3 million enterprises
32.7 million persons employed
€2.24 trillion of value added

In 2020, Germany had the highest share of EU value added for the manufacturing sector (32.4 %), for water supply, sewerage, waste management and remediation activities (30.6 %) and for electricity, gas, steam and air conditioning supply (25.5 %). By contrast, Poland contributed the largest share of value added to the EU's mining and quarrying sector (26.3 %).

Germany also recorded the highest shares of EU employment for the same three industrial activities as noted above, with shares of 26.8 %, 19.4 % and 29.1 % respectively. In a similar vein, Poland also had the largest employment share within the EU's mining and quarrying sector, at 39.0 %.



Note: mining and quarrying, employment, FI not available. Electricity, gas, steam and air conditioning supply, employment, MT not available. Water supply, sewerage, waste management and remediation activities, employment, MT and FI not available.

Source: Eurostat (online data code: sbs_na_ind_r2)

Value added specialisation – top five EU Member States

(%, share of industrial value added, 2020)

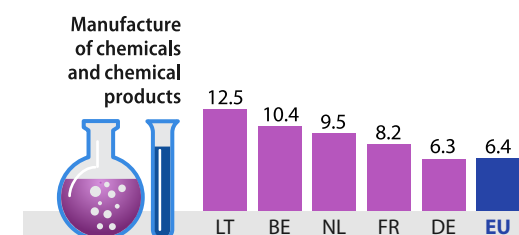
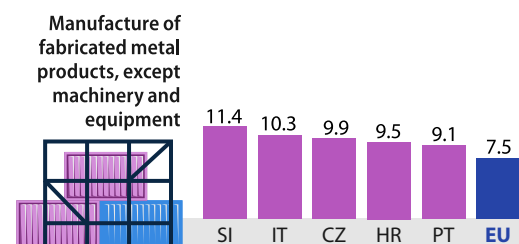
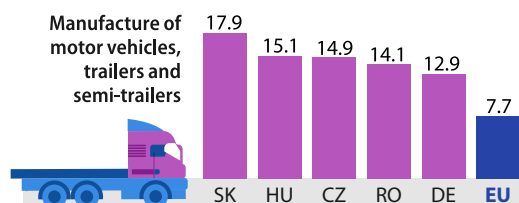
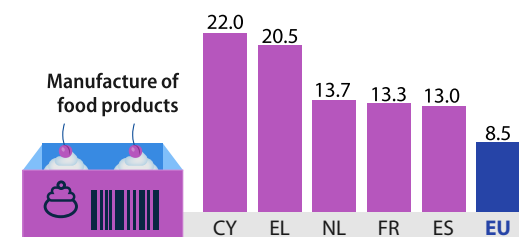
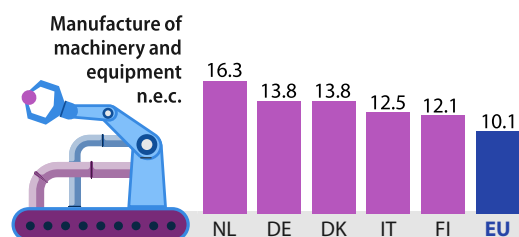
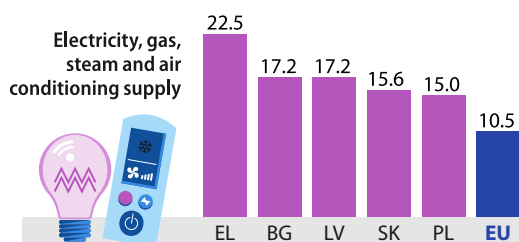
In 2020, the six largest activities (based on NACE Rev. 2 divisions) within the EU's industrial economy when measured by value added were: electricity, gas, steam and air conditioning supply (10.5 % of industrial value added); the manufacture of machinery and equipment not elsewhere classified (10.1 %); the manufacture of food products (8.5 %); the manufacture of motor vehicles, trailers and semi-trailers (7.7 %); the manufacture of fabricated metal products, except machinery and equipment (7.5 %); and the manufacture of chemicals and chemical products (6.4 %).

Among the EU Member States, Greece (22.5 %) had the highest share of its industrial value added within electricity, gas, steam and air conditioning, followed by Bulgaria and Latvia (both 17.2 %). For the manufacture of machinery and equipment, the highest share was in the Netherlands (16.3 %), while for the manufacture of food products the highest shares were recorded in Cyprus (22.0 %) and Greece (20.5 %).

In Slovakia, the manufacture of motor vehicles, trailers and semi-trailers accounted for 17.9 % of industrial value added in 2020, followed by Hungary (15.1 %). In Slovenia, the manufacture of fabricated metal products except machinery and equipment accounted for 11.4 % of industrial value added. Lithuania had the highest degree of relative specialisation across the EU Member States for the manufacture of chemicals and chemical products, with 12.5 % of its industrial value added being generated in this subsector, ahead of Belgium (10.4 %) and the Netherlands (9.5 %).

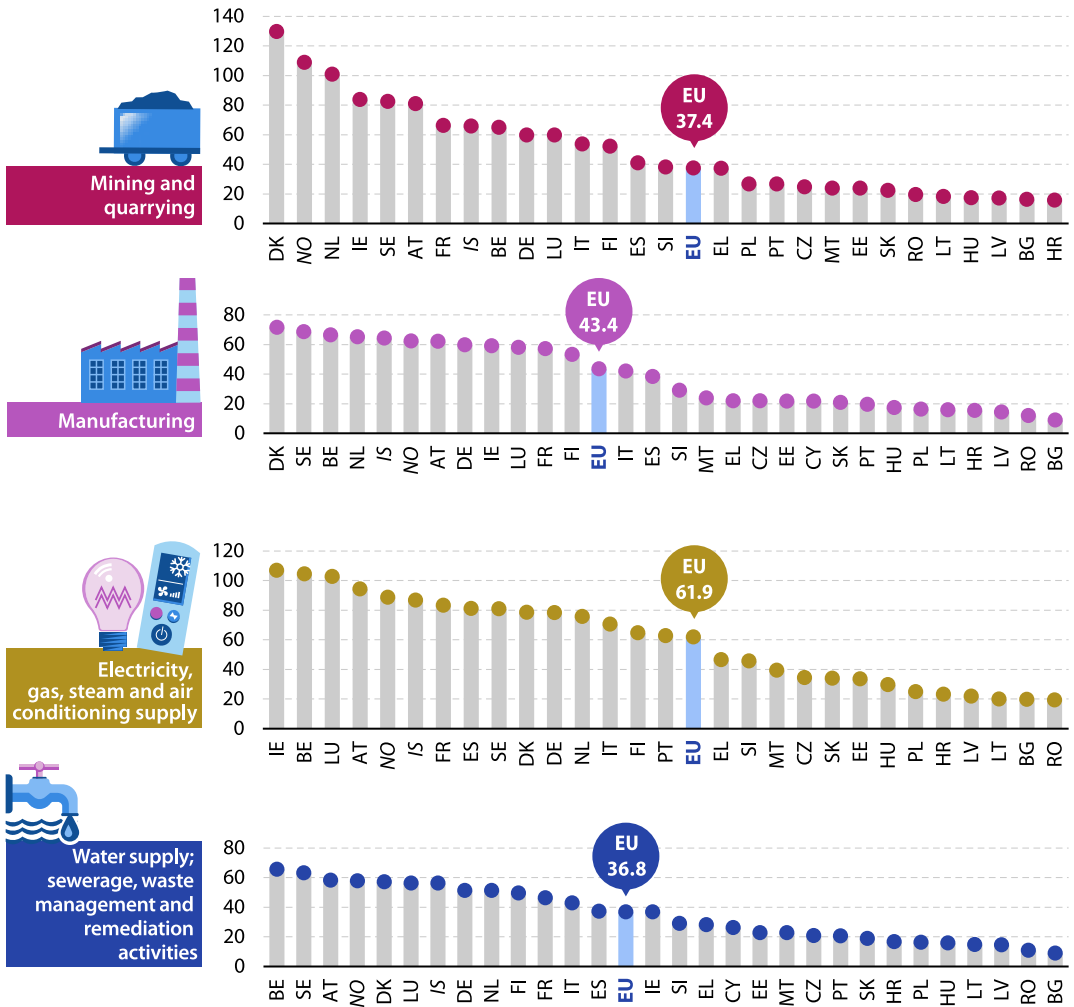
Note: data are shown for the six largest activities based on EU value added for NACE Rev. 2 industrial divisions. Manufacture of machinery and equipment n.e.c.: EU excluding IE; IE not available. Manufacture of food products: IE not available. Manufacture of motor vehicles, trailers and semi-trailers: LU and MT not available. Manufacture of fabricated metal products, except machinery and equipment: EU excluding PL; PL not available. Manufacture of chemicals and chemical products: IE and PL not available.

Source: Eurostat (online data code: sbs_na_ind_r2)



Average personnel costs within industrial sections

(€1 000 per employee, 2020)



Note: mining and quarrying and electricity, gas, steam and air conditioning supply: CY not available.
Source: Eurostat (online data code: sbs_na_ind_r2)

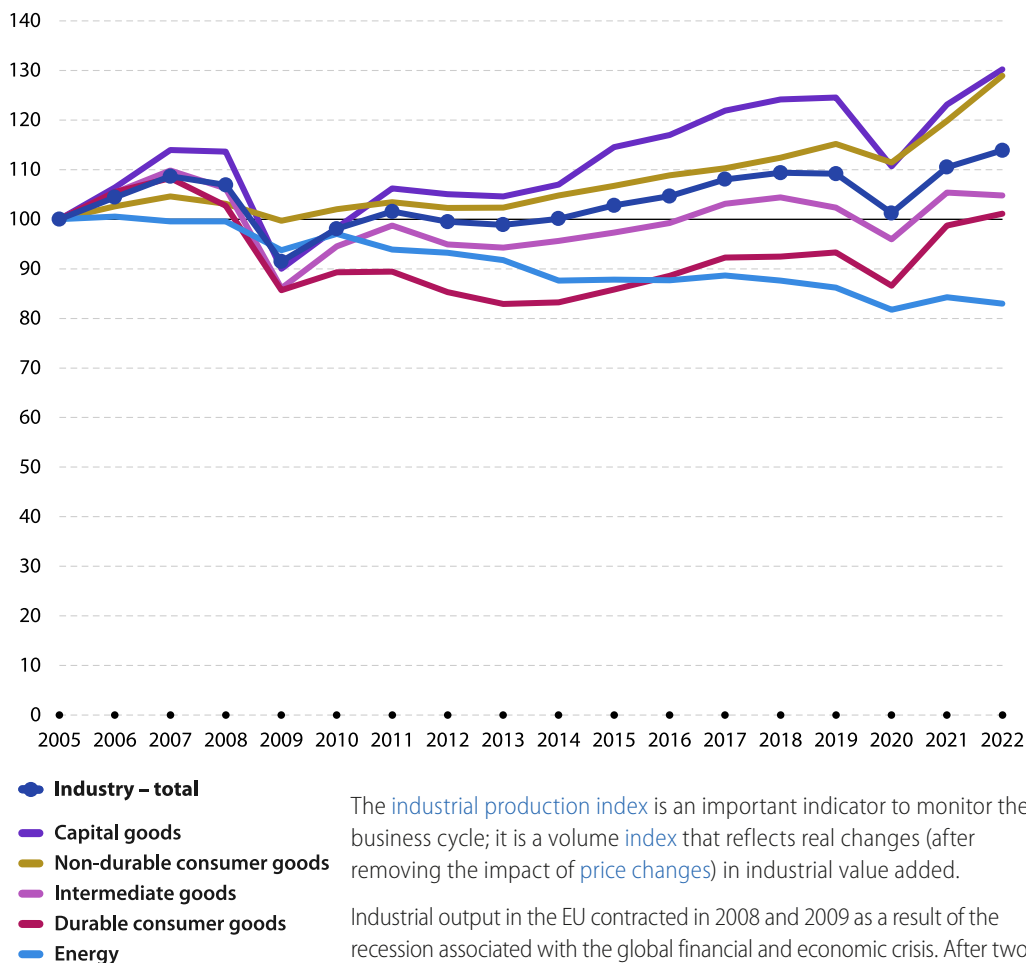
In 2020, average personnel costs across the four sections within the EU's industrial economy ranged from a high of €61 900 per employee for electricity, gas, steam and air conditioning supply down to €36 800 per employee for water supply, sewerage, waste management and remediation activities.

In the vast majority of EU Member States, the highest average personnel costs across industrial activities were registered for electricity, gas, steam and air conditioning supply. The only exceptions in 2020 were Denmark, the Netherlands, Poland and Sweden (incomplete data for Cyprus): in all four cases, average personnel costs were higher for mining and quarrying. By contrast, the lowest average personnel costs were often recorded for water supply, sewerage, waste management and remediation activities. Bulgaria, Estonia, Greece, Croatia, Italy, Latvia and Portugal were exceptions as average personnel costs were lower in manufacturing, while in Belgium these average costs were lower in mining and quarrying.

Developments

Industrial production index

(2005 = 100, EU, 2005–2022)



The **industrial production index** is an important indicator to monitor the business cycle; it is a volume **index** that reflects real changes (after removing the impact of **price changes**) in industrial value added.

Industrial output in the EU contracted in 2008 and 2009 as a result of the recession associated with the global financial and economic crisis. After two years of recovery, there were also decreases in 2012 and 2013 before industrial output in the EU resumed its upward trajectory. Having grown for five consecutive years, there was a 0.2 % decline for the EU’s industrial production index in 2019, followed by a considerable contraction in 2020 (down 7.3 %). This most recent decline was driven by falling output for all types of manufacturing, most notably for capital goods (down 11.1 % in 2020), reflecting the impact of the COVID-19 pandemic. Industrial output rebounded in 2021 and 2022, recording growth of 9.1 % and 3.1 %, respectively: the index level in 2022 was 4.3 % above the level it had been in 2019.

Note: industry covers NACE Rev. 2 Sections B to D. Energy: excluding Section E. Annual aggregates are based on calendar adjusted data.

Source: Eurostat (online data code: [sts_inpr_a](#))

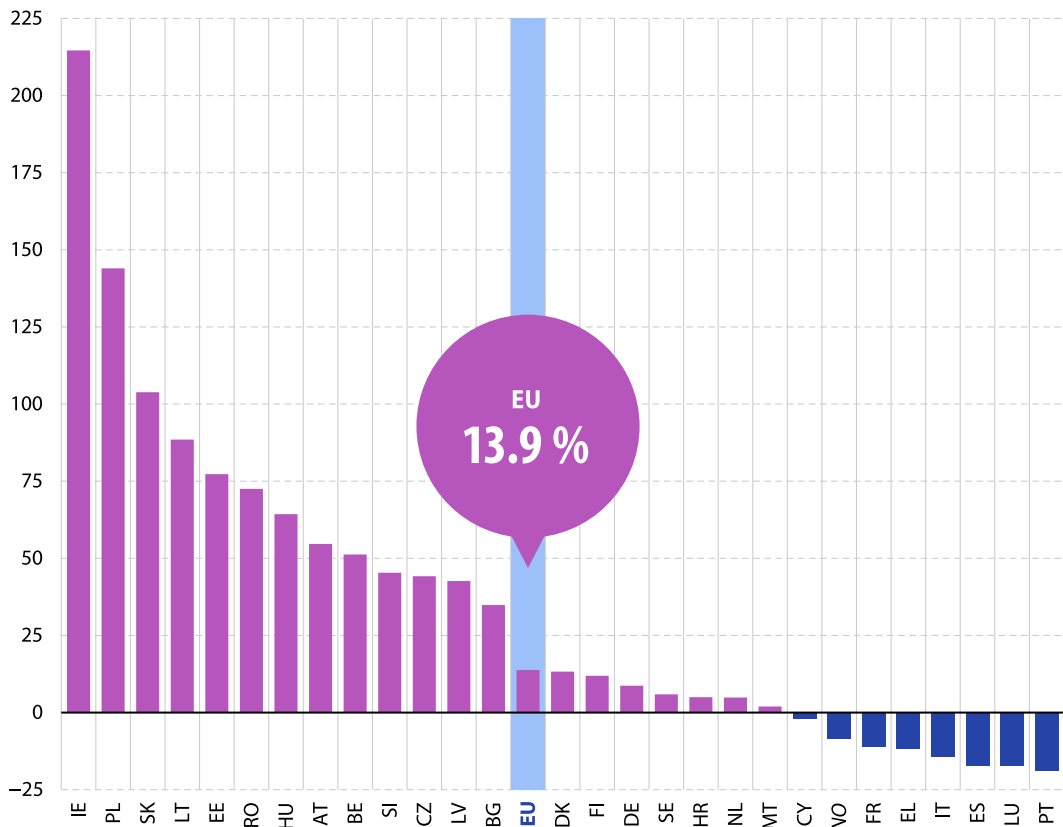
When considering the information shown in the figures on pages 40 and 41 it should be remembered that the period covered (2005–2022) includes the global financial and economic crisis and subsequent recovery. Furthermore, by ending in 2022, the overall rates of change reflect the combination of the long-term developments and the often substantial (downward) impact of the COVID-19 pandemic in 2020 and rebound in 2021 and/or 2022.

Overall change in the industrial production index

(%, 2005–2022)

EU industrial production was 13.9 % higher in 2022 than it had been in 2005. The highest growth rates among the EU Member States during this period were recorded in Ireland, Poland and Slovakia, all of which had a level of industrial output in 2022 that was more than double its 2005 level.

A total of seven EU Member States recorded lower levels of industrial production in 2022 than in 2005. The largest contractions during this period were in Portugal (–18.9 %), Luxembourg (–17.2 %) and Spain (–17.2 %).

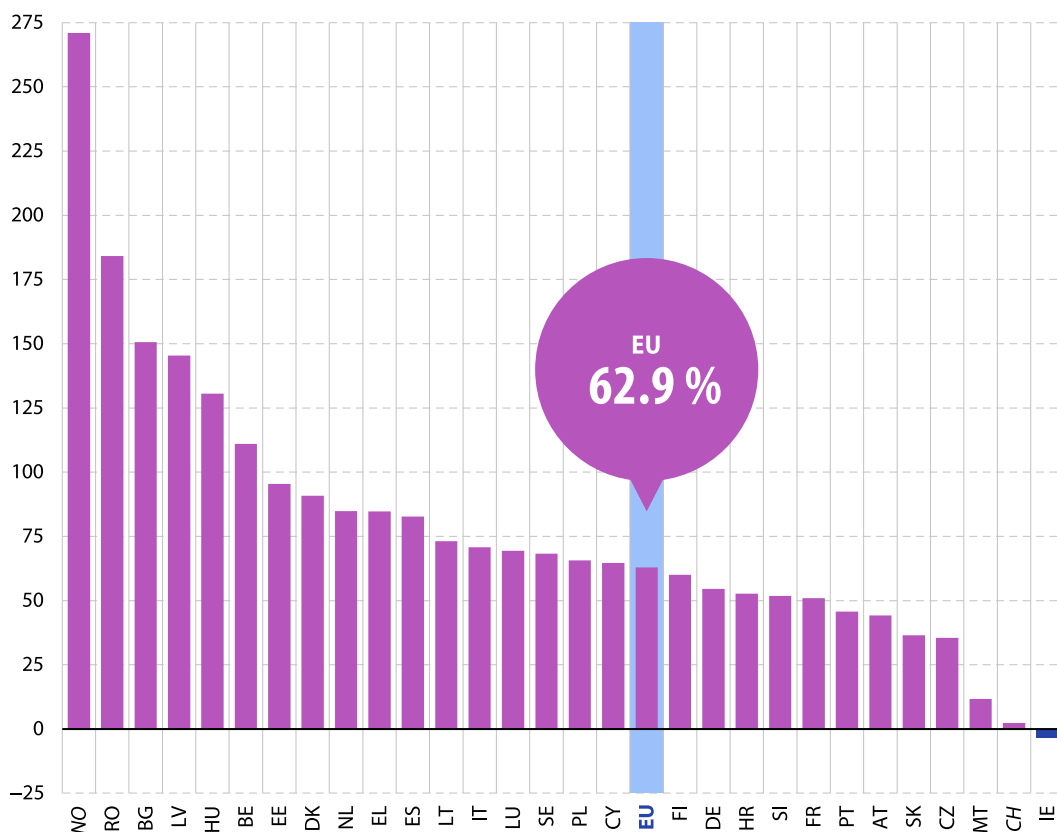


Note: industry covers NACE Rev. 2 Sections B to D.

Source: Eurostat (online data code: sts_inpr_a)

Overall change in industrial producer prices

(%, 2005–2022)



The industrial **producer price index** is based on selling prices reported by a sample of producers. This indicator is used to monitor price developments at various stages of industrial processes; changes in producer prices can be an early indicator of **inflationary** pressures within an economy.

Industrial producer prices in the EU rose at a relatively subdued pace between 2005 and 2022. The overall change in prices during this period was an increase of 62.9 %. This figure was composed of an increase of 17.1 % in the 15 years between 2005 and 2020, followed by annual increases of 9.8 % in 2021 and 26.6 % in 2022.

Industrial producer prices increased between 2005 and 2022 in all EU Member States except for Ireland. The highest increases were recorded in Romania (up 184.1 % overall), Bulgaria (150.6 %) and Latvia (145.4 %).

Note: industry covers NACE Rev. 2 Sections B to D and Division 36.

Source: Eurostat (online data code: [sts_inpp_a](#))

For continuously updated visualisations containing time series for industrial production:



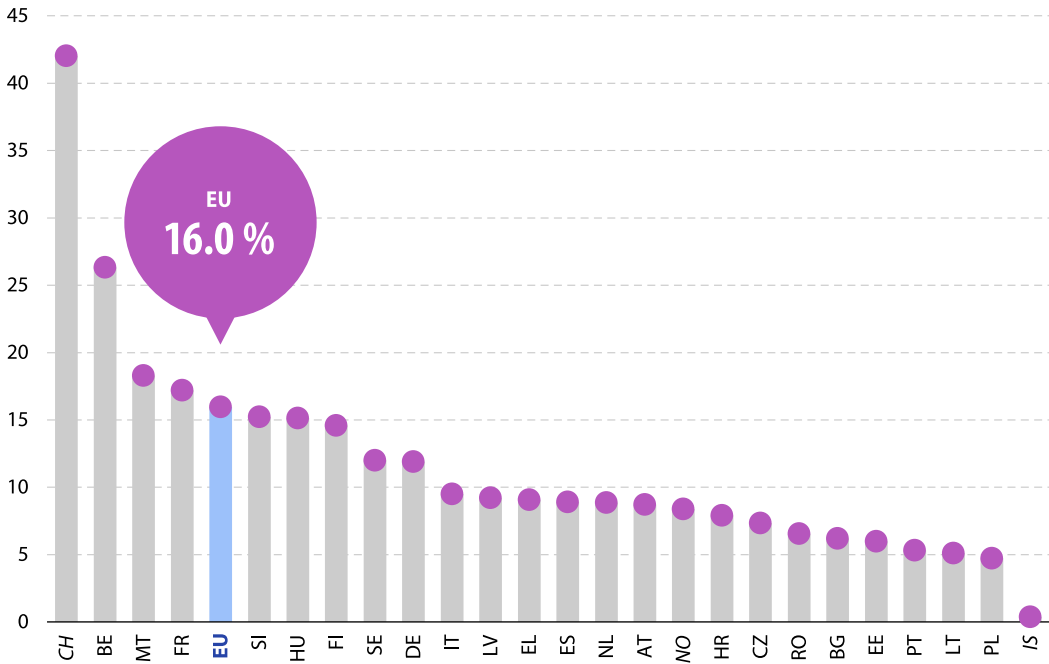
Focus on high-tech industry

High-tech manufacturing activities

(%, share of manufacturing value added, 2020)

High-tech industries cover the manufacture of selected products: pharmaceuticals; computer, electronic and optical products; air and spacecraft and related machinery. In 2020, these activities provided work to 2.1 million people in the EU (7.0 % of manufacturing employment), while they added €300 billion of value (16.0 % of manufacturing value added).

In 2020, high-tech industries accounted for 26.3 % of manufacturing value added in Belgium, while the next largest shares were recorded in Malta (18.3 %; 2018 data) and France (17.2 %). In a majority of the EU Member States less than 10.0 % of added value in manufacturing was derived from high-tech industries. The lowest share was recorded in Poland (4.7 %).

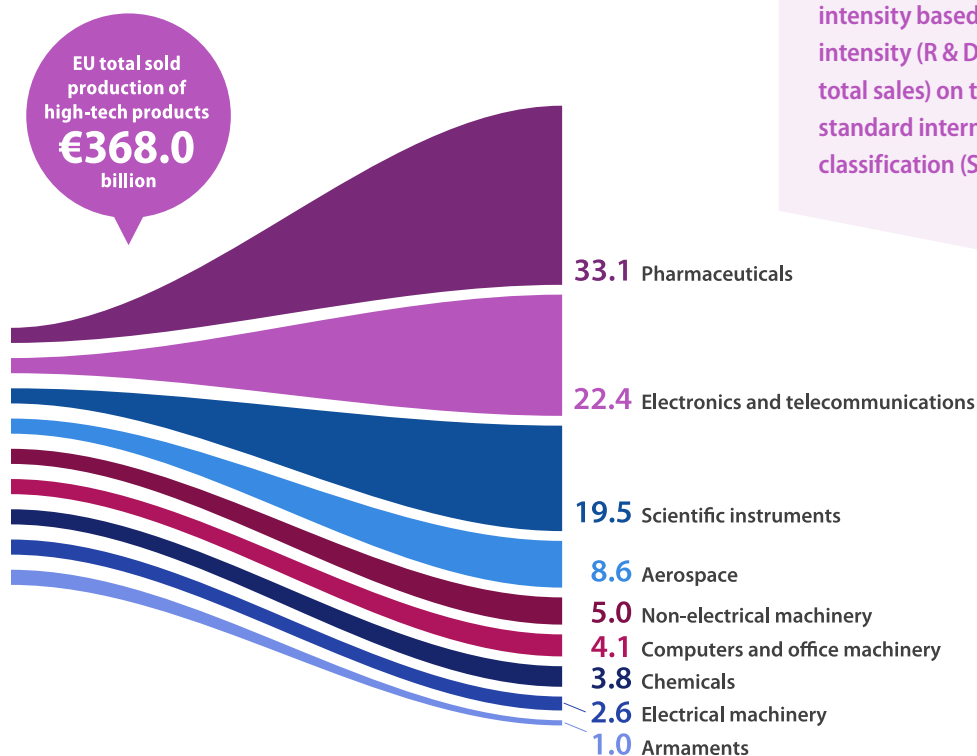


Note: DK, IE, CY, LU and SK, not available. SI, SE and CH: 2019. EE and MT: 2018. NL: 2017.

Source: Eurostat (online data code: sbs_na_sca_r2)

Sold production of high-tech products

(%, share of all high-tech products, EU, 2020)



High-tech products are defined according to their level of technological intensity based on R & D intensity (R & D expenditure / total sales) on the basis of the standard international trade classification (SITC).

Based on information in value terms.

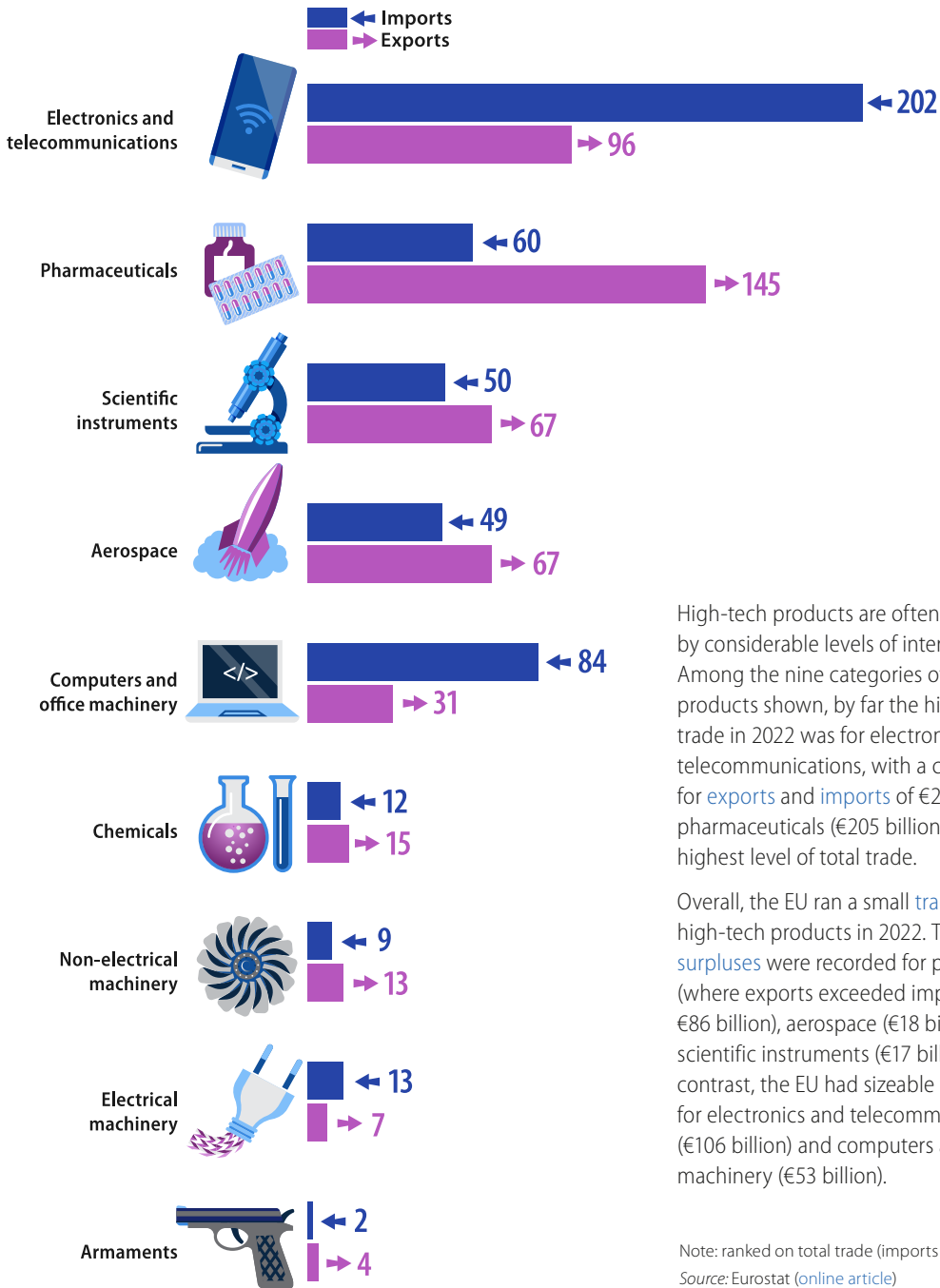
Source: Eurostat ([online article](#))

In 2021, 33.1 % of the EU's sold production of high-tech products was made-up of pharmaceuticals, while electronics and telecommunications (22.4 %) also contributed a relatively high proportion, as did scientific instruments (19.5 %); none of the other categories recorded a double-digit share. At the other end of the range, armaments accounted for just 1.0 % of the sold production of high-tech products in the EU.



Trade in high-tech products

(€ billion, EU, 2022)



High-tech products are often characterised by considerable levels of international trade. Among the nine categories of high-tech products shown, by far the highest level of trade in 2022 was for electronics and telecommunications, with a combined value for exports and imports of €298 billion; pharmaceuticals (€205 billion) had the next highest level of total trade.

Overall, the EU ran a small trade deficit for high-tech products in 2022. The largest surpluses were recorded for pharmaceuticals (where exports exceeded imports by €86 billion), aerospace (€18 billion) and scientific instruments (€17 billion). By contrast, the EU had sizeable trade deficits for electronics and telecommunications (€106 billion) and computers and office machinery (€53 billion).

Note: ranked on total trade (imports + exports).
Source: Eurostat ([online article](#))

4

Construction



Structure

Construction activities include the construction of buildings, civil engineering and specialised construction activities. Across the EU, by far the largest of these three divisions was specialised construction activities: in 2020, these activities accounted for nearly three fifths (58.6 %) of construction value added and for an even higher share of construction employment (63.3 %).

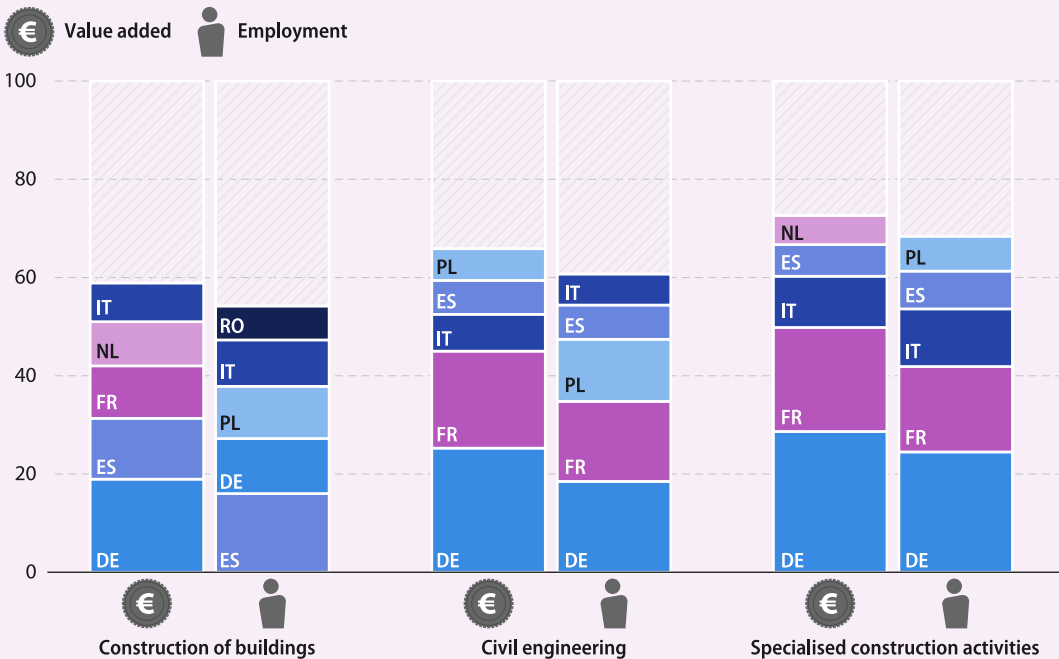
Concentration of construction activity – top five EU Member States

(%, share of EU employment and value added for each activity, 2020)

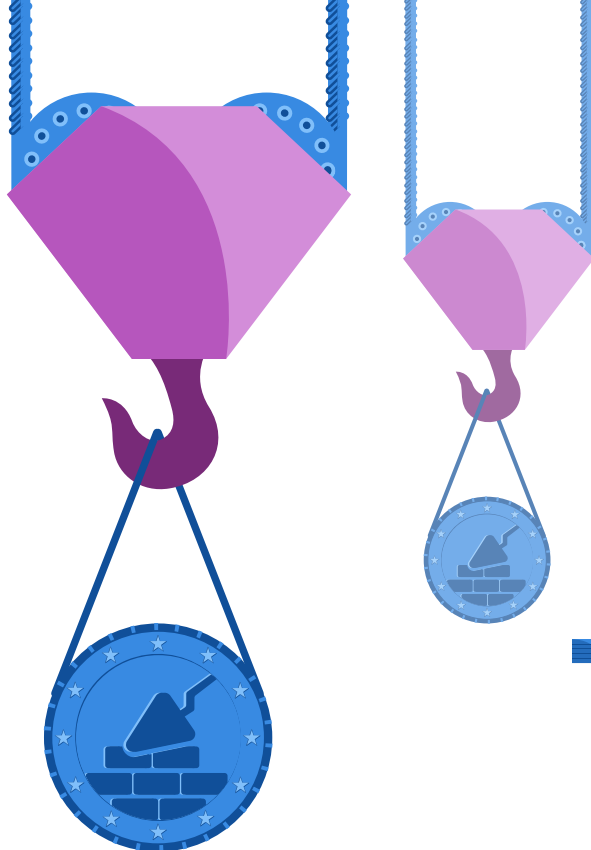
EU construction sector in 2020
3.5 million enterprises
12.9 million persons employed
€547 billion of value added

In all three of the construction divisions, Germany was the largest EU Member State in value added terms. For civil engineering and for specialised construction activities, France, Italy and Spain were the next largest, whereas for the construction of buildings the next largest were Spain, France and the Netherlands.

Germany and France had the largest and second largest levels of employment for civil engineering and for specialised construction activities, while Spain had the largest workforce for the construction of buildings, followed by Germany. In various orders, Poland, Spain and Italy generally had the third to fifth largest workforces for these three divisions, although the Romanian workforce was the fifth largest for the construction of buildings.



Source: Eurostat (online data code: sbs_na_con_r2)



Value added specialisation – top five EU Member States

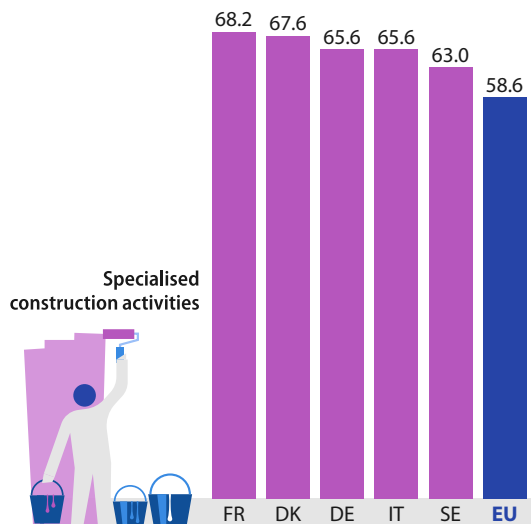
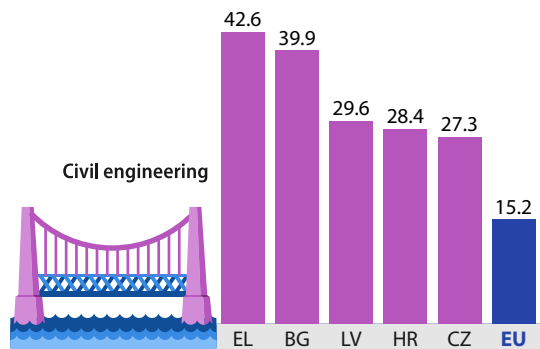
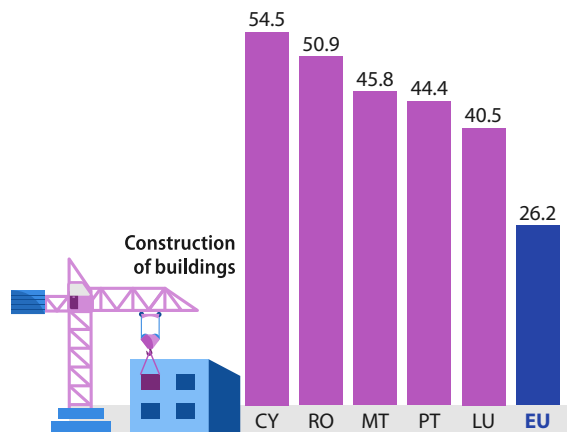
(%, share of construction value added, 2020)

A lot of construction is done by **enterprises** serving a relatively small geographical market, with little international trade compared with many industrial activities. There are nevertheless quite large specialisations in the three construction divisions.

In 2020, over half of construction value added in Cyprus and Romania resulted from the construction of buildings, approximately double the average for the EU (26.2%). In Greece, civil engineering contributed more than two fifths of the construction total and in Bulgaria the share was only slightly lower; both had shares that were more than two and a half times the average for the EU (15.2%). It was commonplace for specialised construction activities to account for more than half of construction value added: the EU average was 58.6% and this share was around two thirds in Italy, Germany, Denmark and France.

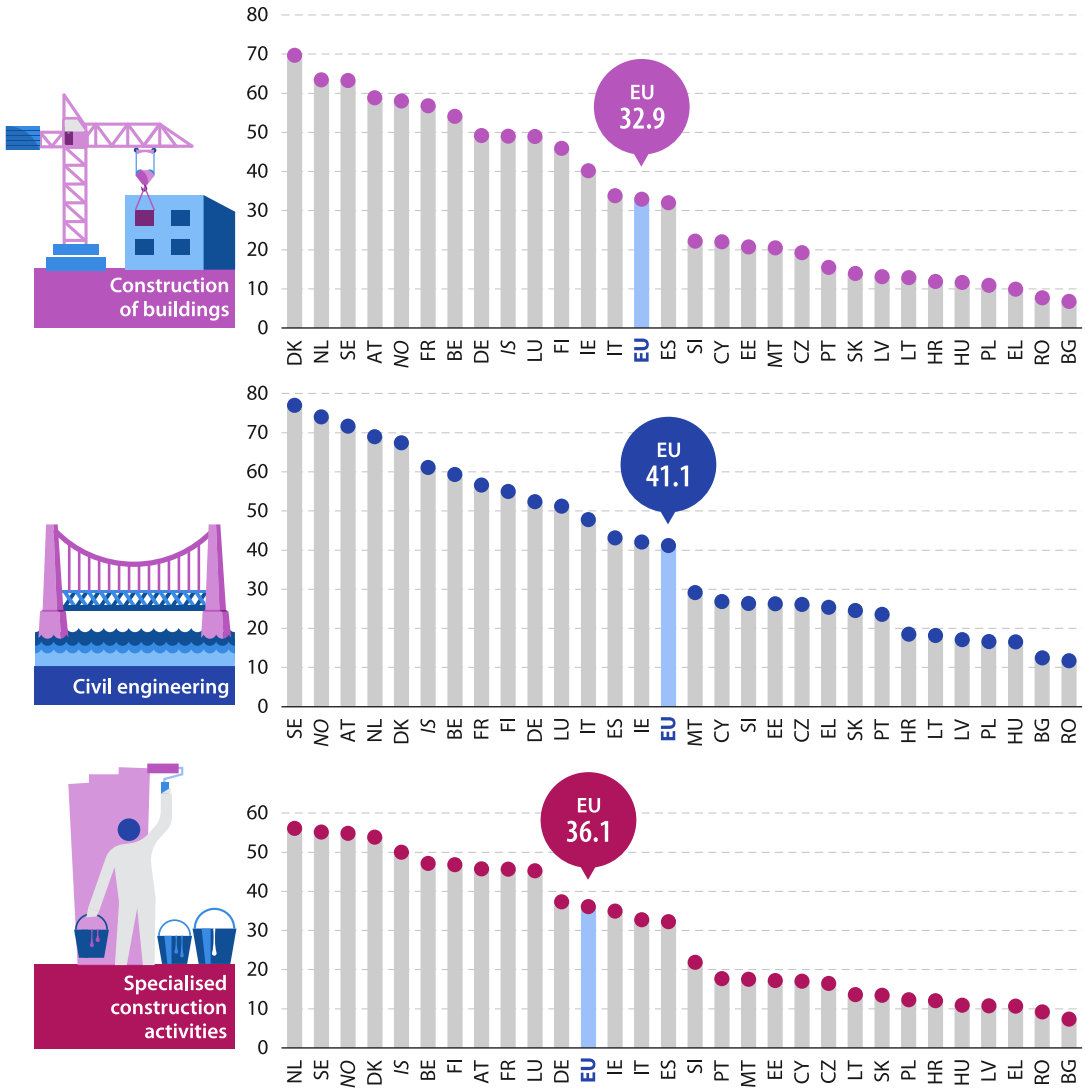
Note: data are shown for the three NACE Rev. 2 construction divisions.

Source: Eurostat (online data code: sbs_na_con_r2)



Average personnel costs within construction divisions

(€1 000 per employee, 2020)



Source: Eurostat (online data code: sbs_na_con_r2)

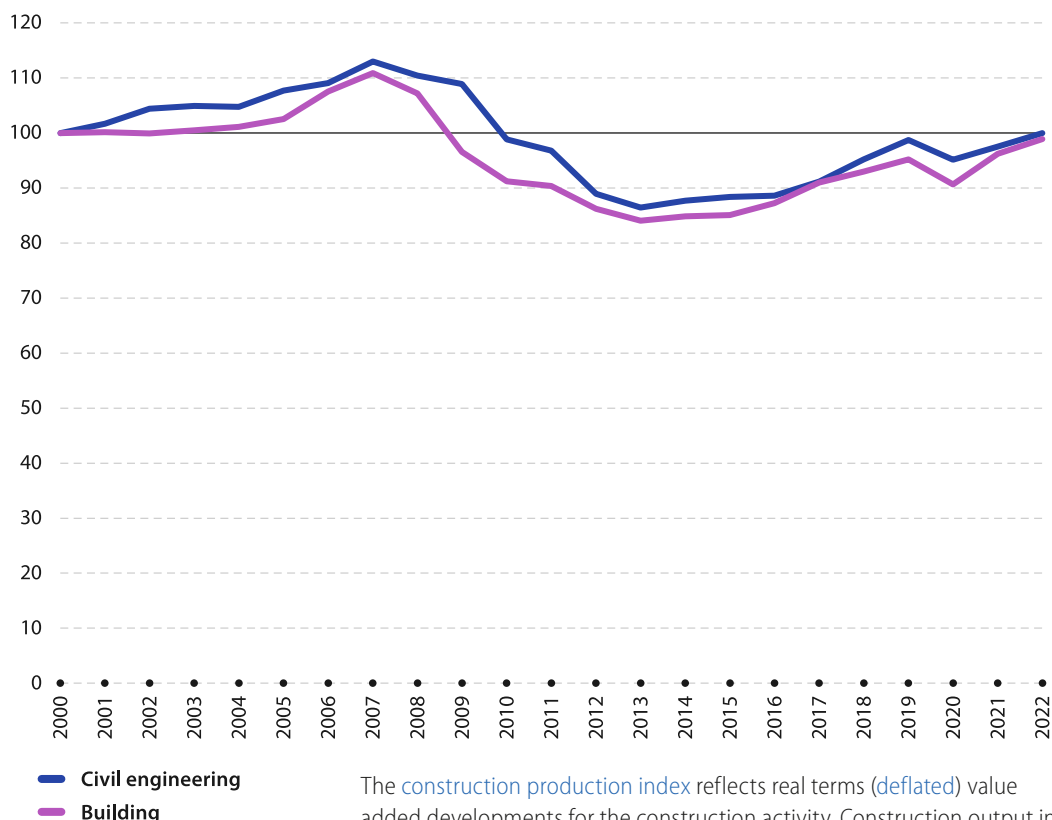
In 2020, average personnel costs across the three divisions of the EU's construction sector ranged from a high of €41 100 per employee for civil engineering down to €32 900 per employee for the construction of buildings.

In the EU, average personnel costs were lower for the construction of buildings than for the other two construction divisions. However, this situation was only observed in nine EU Member States. In a majority of Member States, the lowest average personnel costs were recorded for specialised construction activities (which dominate the construction sector in the largest Member States). In all except two Member States, the highest average personnel costs were for civil engineering. Denmark and France were the exceptions, with their highest average personnel costs recorded for the construction of buildings.

Developments

Construction production index

(2000 = 100, EU, 2000–2022)



Note: annual aggregates are based on calendar adjusted data.

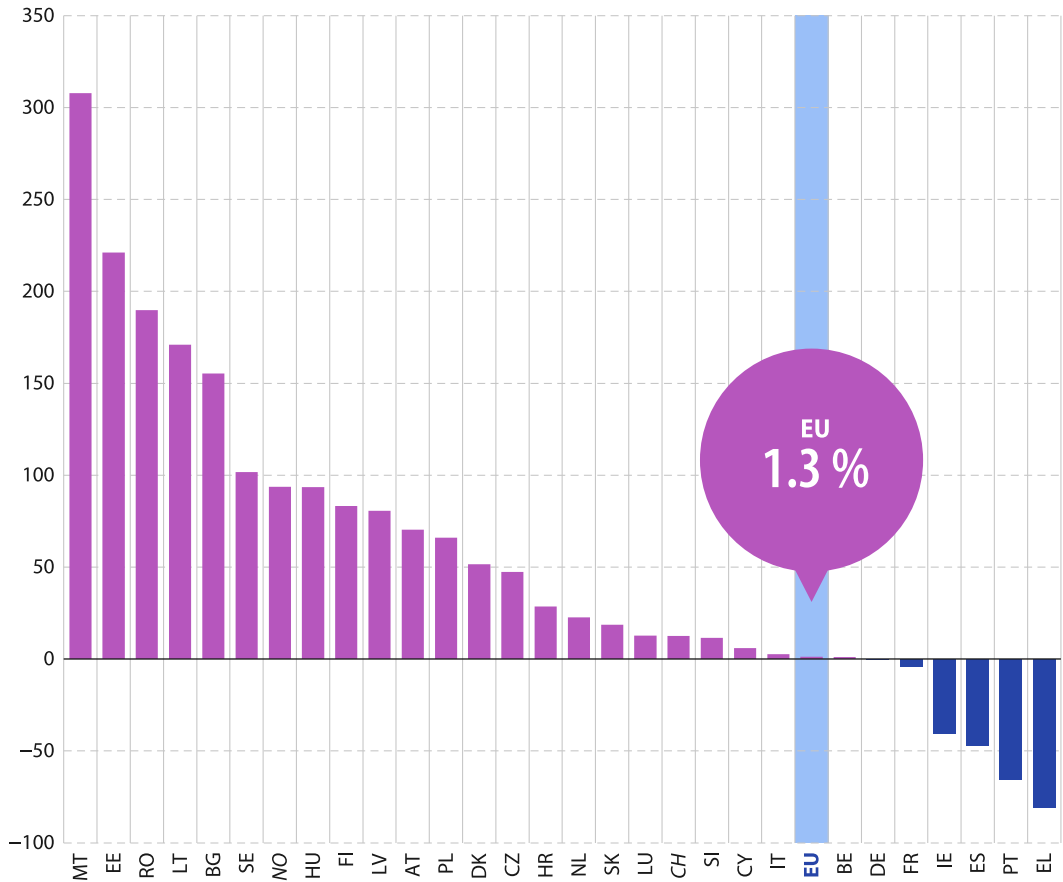
Source: Eurostat (online data code: sts_copr_a)

The **construction production index** reflects real terms (deflated) value added developments for the construction activity. Construction output in the EU was relatively stable between 2000 and 2004 and then expanded up until 2007. In 2008, the impact of the global financial and economic crisis was felt; there was a decline in output recorded each year from 2008 to 2013. Despite some recovery thereafter, construction output in 2019 was still 12.6 % lower than it had been in 2007. In 2020, output fell 4.8 %, reflecting the impact of the COVID-19 pandemic. This fall was comparable in percentage terms with the falls recorded in 2010 and 2012, but notably smaller than that in 2009. In 2021, output rebounded, increasing 5.5 % to a level slightly above that observed before the pandemic (in 2019) and in 2022 it expanded again, up 2.7 %.

The developments for building and civil engineering were quite similar, peaking in 2007, reaching a low point in 2013 and recovering only partially before turning down again in 2020 and back up in 2021 and 2022. In 2022, the levels of output of building and civil engineering were 10.8 % and 11.5 % below their respective 2007 peaks.

Overall change in the construction production index

(%, 2000–2022)



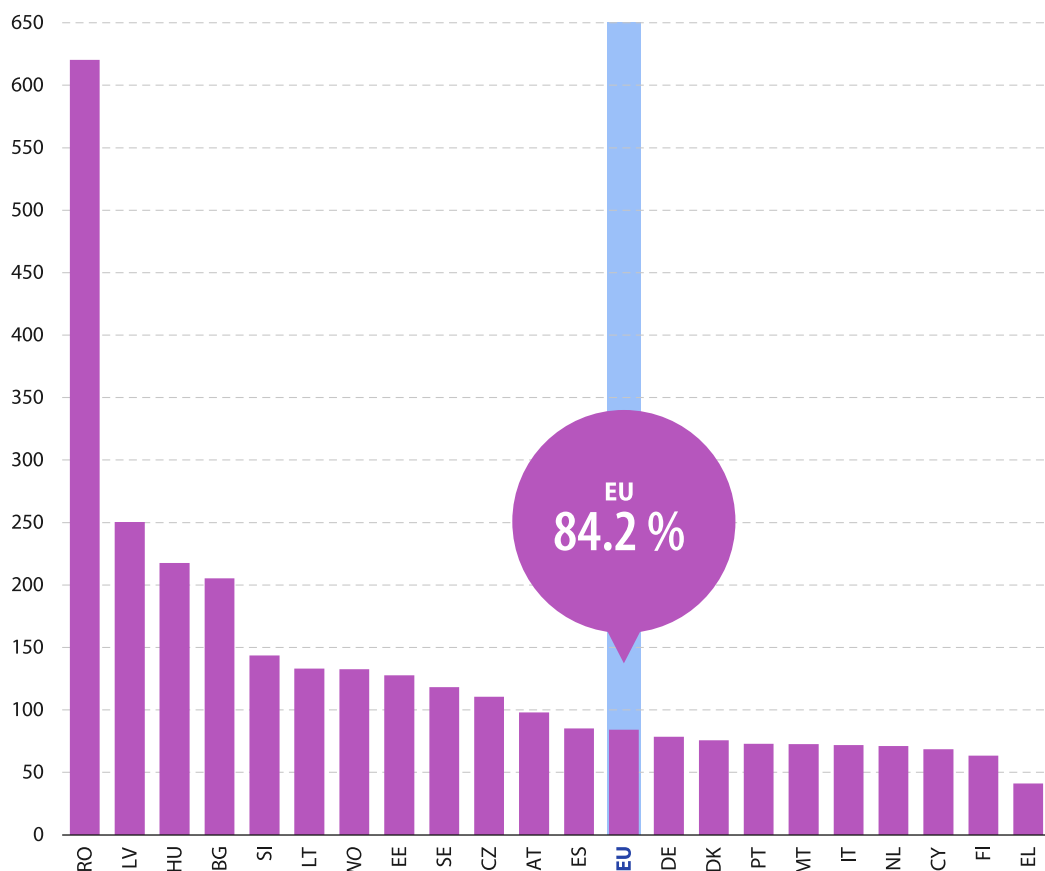
Although the EU’s construction output was almost unchanged between 2000 and 2022 (up 1.3 % overall), developments varied greatly between the EU Member States. Greece’s construction output in 2022 was 80.8 % below its 2000 level, while there were also considerable contractions recorded in Portugal (down 65.5 %), Spain (down 47.1 %) and Ireland (down 40.5 %). At the other end of the scale, construction output in Sweden, Bulgaria, Lithuania and Romania more than doubled between 2000 and 2022, while in Estonia it more than tripled and in Malta it more than quadrupled (up 307.8 %).

Note: CY: 2021.

Source: Eurostat (online data code: sts_copr_a)

Overall change in construction costs for new residential buildings

(%, 2000–2022)



A costs index is available for the construction of new residential buildings (excluding residences for communities). Between 2000 and 2022, construction costs for this type of building work increased 84.2 % within the EU. Much of this increase was recent, as the annual increases in 2021 (up 6.5 %) and 2022 (up 12.6 %) were both larger than in any other year during the period under consideration.

Cost increases were particularly large in Romania, where they were more than seven times as high in 2022 as they had been in 2000 (up 620.4 %); costs more than trebled in Latvia (up 250.5 %) and Hungary (up 217.5 %). The smallest increase for construction costs of new residential buildings was observed in Greece (up 41.1 %).

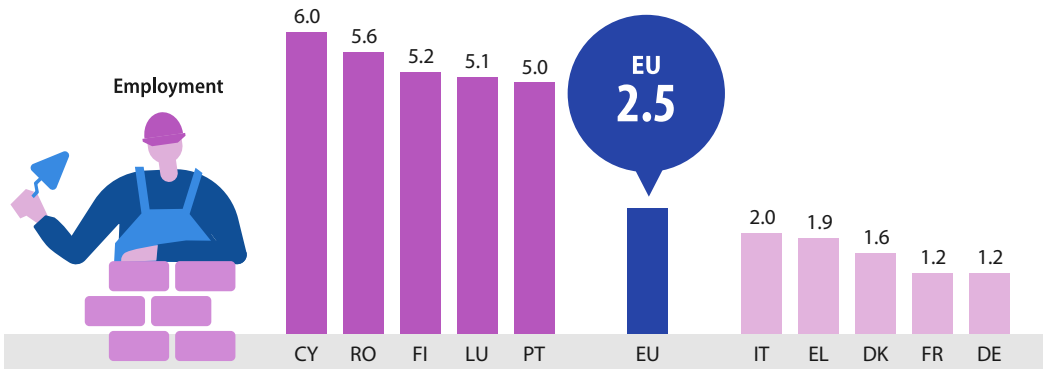
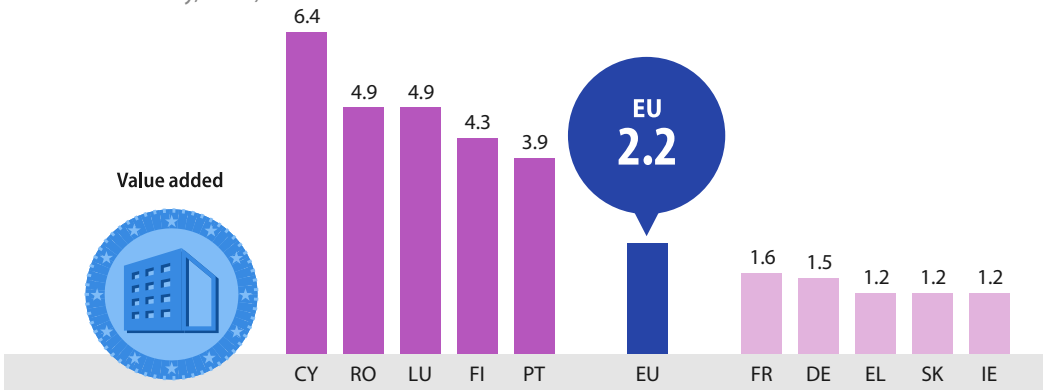
Note: the construction costs index for new residential buildings excludes residences for communities. BG: 2003-2022. CY, HU, MT and RO: 2000-2021. BE, IE, FR, HR, LU, PL and SK: not available.

Source: Eurostat (online data code: sts_copi_a)

Focus on building construction

Construction of buildings – top five and bottom five EU Member States

(%, share of value added and the number of persons employed in the non-financial business economy, 2020)



Note: the construction of buildings covers NACE Rev. 2 Division 41.

Source: Eurostat (online data code: [sbs_na_sca_r2](#))

The construction of buildings contributed 2.2 % of value added in the EU’s **non-financial business economy** in 2020 and employed 2.5 % of the workforce. Compared with the EU average, this activity accounted for more than double the non-financial business economy share in value added terms in Cyprus, Romania and Luxembourg and for double or more the share in employment terms in Cyprus, Romania, Finland, Luxembourg and Portugal. These relatively high shares reflect a number of factors driving demand (such as overall population growth and tourism-related construction activity), as well as characteristics of the organisation of the construction sector between builders and specialists.

Building permit index

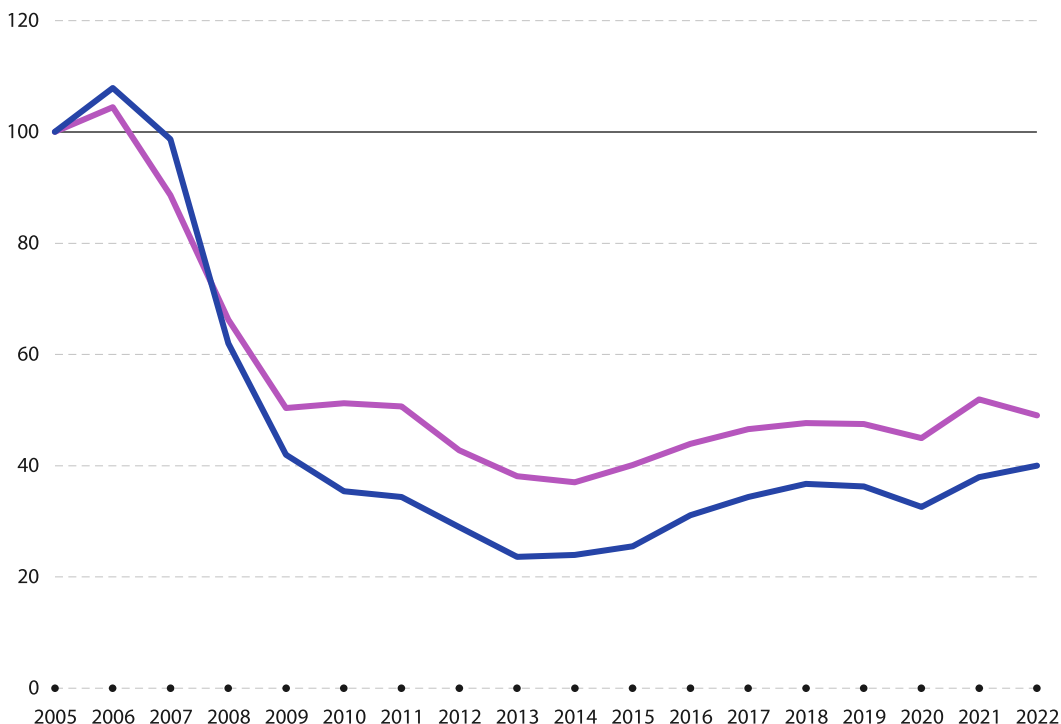
(2005 = 100, EU, 2005–2022)

The index of **building permits** reflects the number of permits granted and therefore provides a measure of expected demand for building activity in the near future. The index is available for two types of buildings: one-dwelling residential buildings and residential buildings with two or more dwellings (but not residential buildings for communities). Across the EU, permits for both types of dwellings fell strongly from peaks in 2006 to relative lows in 2013 (for residential buildings with two or more dwellings) and 2014 (for one-dwelling residential buildings). Despite some recovery thereafter – interrupted in 2020 by the start of the COVID-19 pandemic – the index for one-dwelling residential buildings in 2022 was around half its 2006 peak level, while the index for residential buildings with two or more dwellings was at two fifths of its 2006 peak level.

Note: a building permit is an authorisation to start work on a building project; the index is based on the number of dwellings for which a permit has been granted. Annual aggregates are based on calendar adjusted data.

Source: Eurostat (online data code: sts_cobp_a)

- One-dwelling buildings
- Two- and more dwelling buildings



For continuously updated visualisations containing time series for construction:



5

Distributive trades



Structure

Distributive trades cover three economic activities, namely motor, wholesale and retail trades. Wholesale trade was the largest of these three divisions in the EU in value added terms, with 49.5 % of the distributive trades total in 2020 compared with 39.0 % for retail trade. In employment terms, the situation was reversed, with retail trade contributing 55.4 % compared with 32.6 % for wholesale trade.

Concentration of distributive trades activity – top five EU Member States

(%, share of EU employment and value added for each activity, 2020)

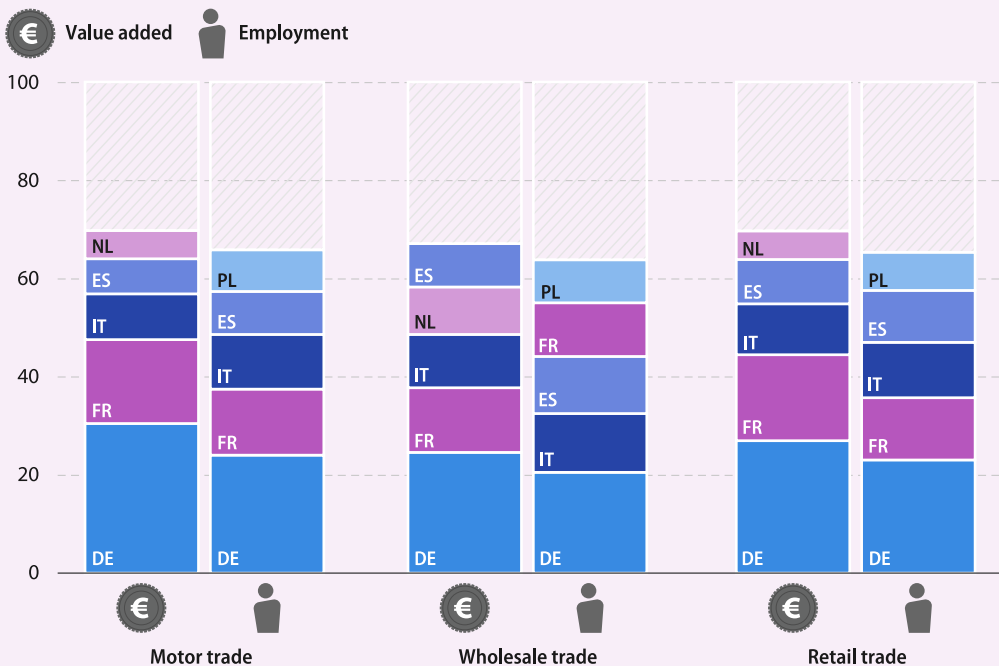
EU distributive trades in 2020

5.7 million enterprises

29.2 million persons employed

€1.26 trillion of value added

Germany had the largest share of EU value added across all three distributive trades divisions in 2020, followed by France and Italy. For motor trade and for retail trade, Spain had the fourth largest share, followed by the Netherlands, while this order was reversed for wholesale trade. In employment terms, the main difference was that Poland was the fifth largest EU Member State (and the Netherlands was not in the top five). In addition, the ranking was somewhat different for wholesale trade, as France's level of employment in this activity was smaller than the employment levels of Italy and of Spain.

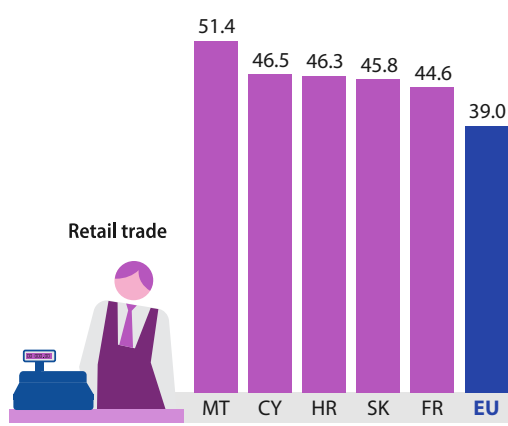
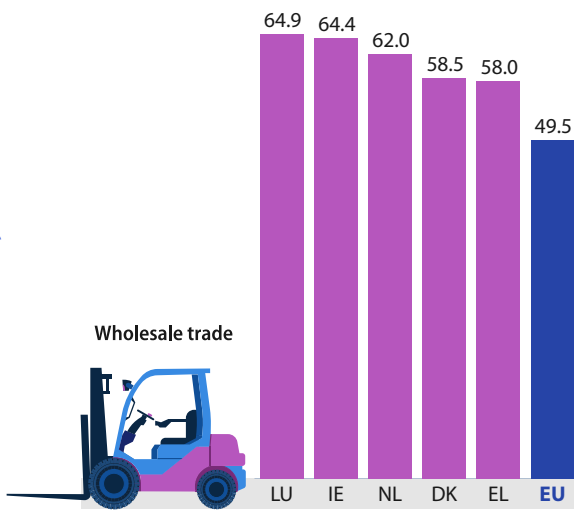
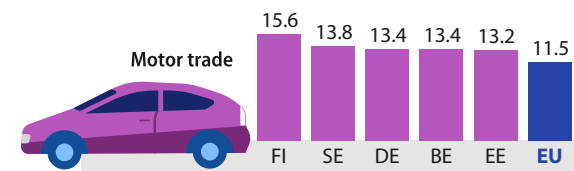


Source: Eurostat (online data code: sbs_na_dt_r2)



Value added specialisation – top five EU Member States

(%, share of distributive trades value added, 2020)



Given the essential local nature of many distributive trade activities, there tends to be less geographical specialisation than observed for many industrial or other service activities. For example, 15.6 % of distributive trades value added in Finland was recorded in motor trades in 2020, more than in any other EU Member State, but this was not much higher than the EU average (11.5 %).

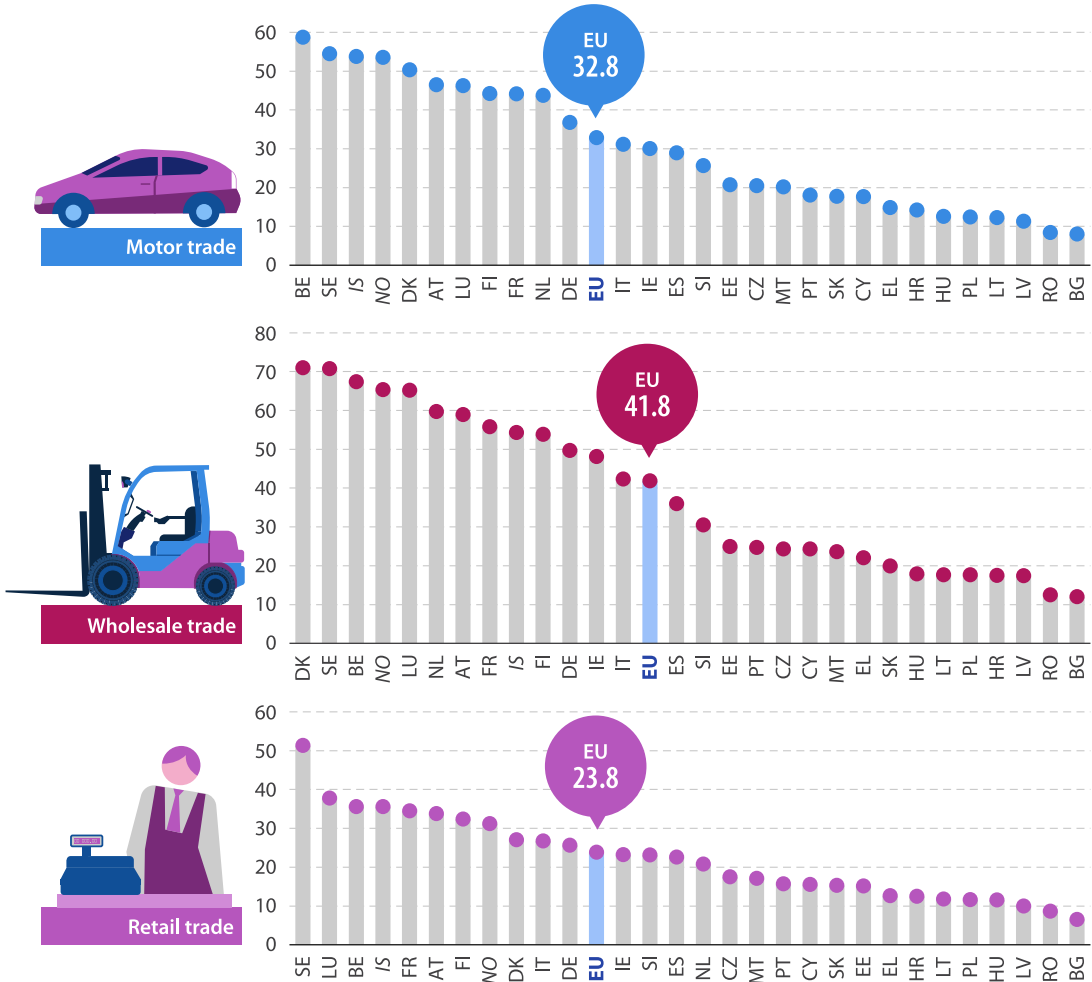
Luxembourg (64.9 %), Ireland (64.4 %) and the Netherlands (62.0 %) were in the top three EU Member States in terms of the contribution made by wholesale trade to distributive trades' value added in 2020. Malta (51.4 %), Cyprus (46.5 %) and Croatia (46.3 %) – three Member States that host large numbers of **tourists** each year – recorded the highest contributions of retail trade to distributive trades' value added.

Note: data are shown for the three NACE Rev. 2 distributive trades divisions.

Source: Eurostat (online data code: [sbs_na_dt_r2](#))

Average personnel costs within distributive trades divisions

(€1 000 per employee, 2020)



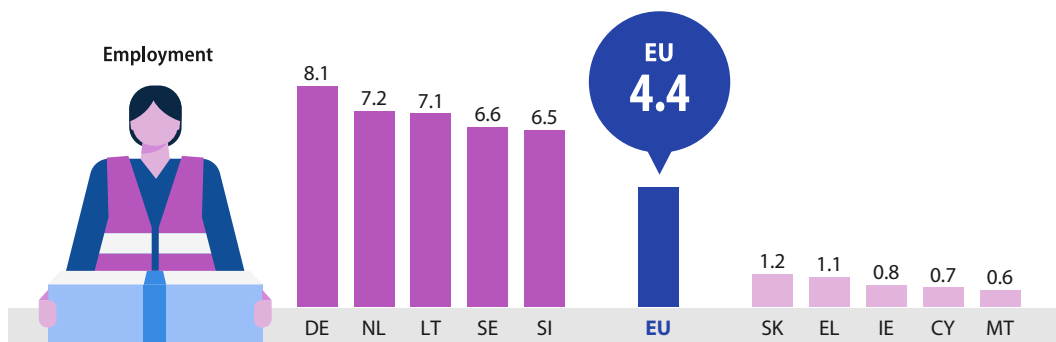
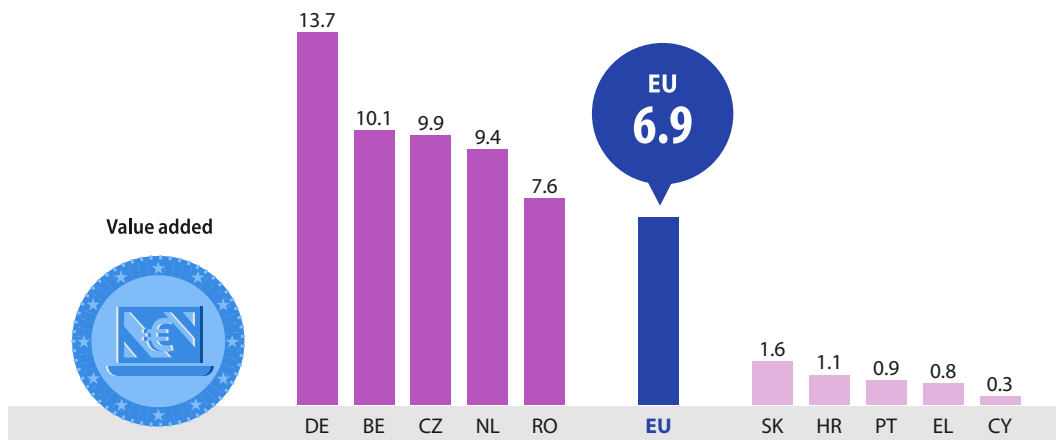
Source: Eurostat (online data code: sbs_na_dt_r2)

Typically, the lowest average personnel costs can often be observed in sectors with a high incidence of part-time and seasonal work, such as retail trade. Across the EU's distributive trades' sector, average personnel costs in 2020 ranged from a high of €41 800 per employee for wholesale trade down to a low of €23 800 per employee for retail trade.

In 2020, Denmark recorded the highest average personnel costs among EU Member States for wholesale trade (€71 000 per employee). Belgium had the highest average personnel costs for motor trade (€58 700 per employee), while Sweden had the highest average personnel costs for retail trade (€51 300 per employee). At the other end of the scale, the lowest average personnel costs for all three distributive trades divisions were recorded in Latvia, Romania and Bulgaria.

Retail sale via mail order houses or via internet – top five and bottom five EU Member States

(%, share in retail trade, 2020)



Internet retailing has gained in significance over many years and expanded further in 2020, boosted by COVID-19 restrictions. In the EU, the subsector covering retail sale via mail order houses or via internet accounted for 6.9 % of retailing value added in 2020 and 4.4 % of retailing employment. In value added terms, Germany was clearly the most specialised EU Member State in these forms of remote trading, while Cyprus was the least specialised.

Note: retail trade covers NACE Rev. 2 Division 47 and retail sale via mail order houses or via internet covers NACE Rev. 2 Class 47.91. LU: not available.

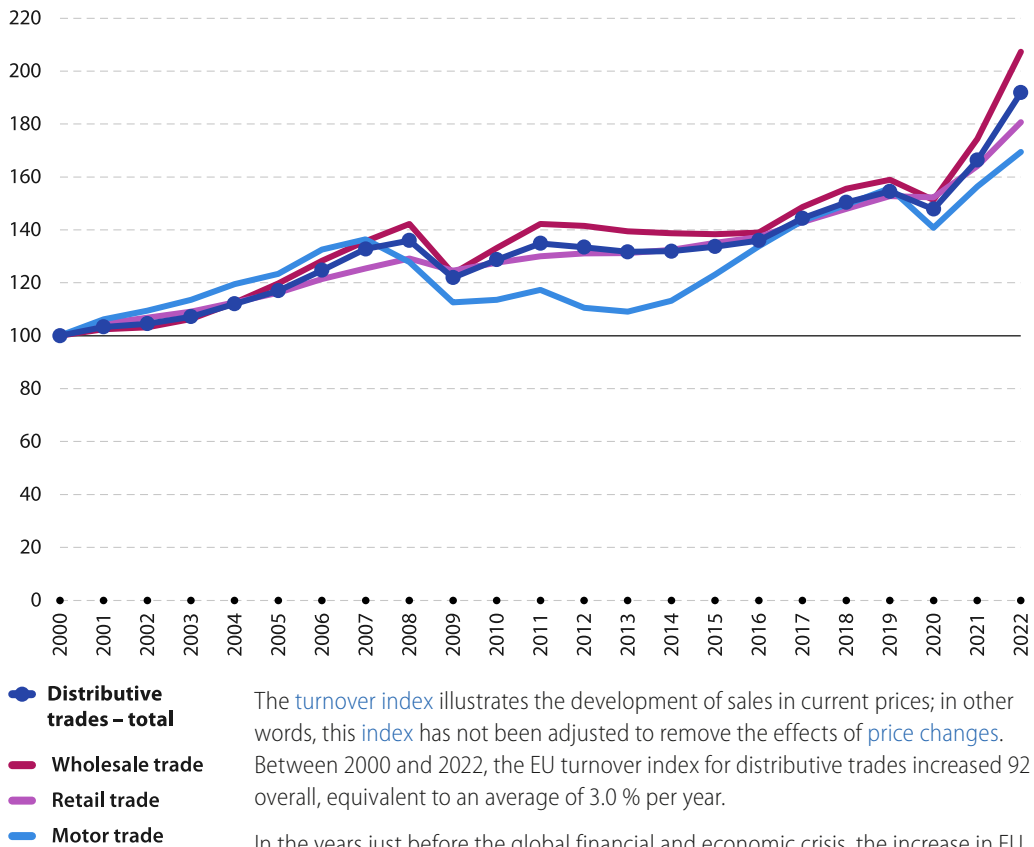
Source: Eurostat (online data code: [sbs_na_dt_r2](#))



Developments

Distributive trades turnover index

(2000 = 100, EU, 2000–2022)



- Distributive trades – total
- Wholesale trade
- Retail trade
- Motor trade

Note: turnover value indices. Annual aggregates are based on calendar adjusted data.

Source: Eurostat (online data code: sts_trtu_a)

The **turnover index** illustrates the development of sales in current prices; in other words, this **index** has not been adjusted to remove the effects of **price changes**.

Between 2000 and 2022, the EU turnover index for distributive trades increased 92 % overall, equivalent to an average of 3.0 % per year.

In the years just before the global financial and economic crisis, the increase in EU distributive trades turnover index slowed before a fall of 10.3 % was observed in 2009. Relatively strong growth returned in 2010 and 2011, but thereafter the rates of change were rather subdued for several years (including slight falls in turnover in 2012 and 2013). Stronger growth was again observed from 2017 to 2019 before a fall of 4.3 % was recorded in 2020, reflecting the impact of the COVID-19 pandemic. This was followed by a rebound of 12.5 % in 2021 and even faster growth in 2022 (up 15.4 %), largely resulting from a high level of inflation.

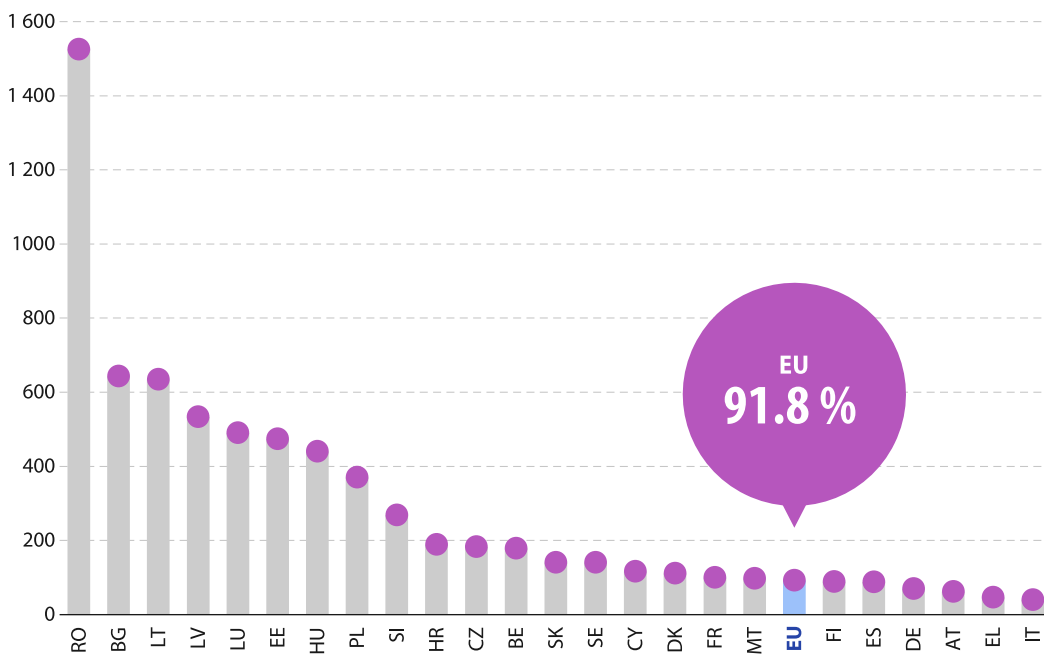
In turnover terms, the fastest growing distributive trades activity in the EU was wholesale trade; its turnover was 107 % higher in 2022 than it had been in 2000, an annual average increase of 3.4 %. Increases in turnover for the retail and motor trades were slightly more subdued, up 81 % and 69 % overall between 2000 and 2022.

Overall change in the distributive trades turnover index

(%, 2000–2022)

Developments in distributive trades turnover between 2000 and 2022 varied enormously between the EU Member States, reflecting differences in price changes as well as underlying real changes. During this period, only six Member States (among the 24 for which data are available) recorded a lower overall change than was observed for the EU as a whole (up 91.8 %);

among these were three of the largest, namely Spain, Germany and Italy. The largest overall increases in distributive trades turnover were recorded in Romania (up 1 525.6 %), Bulgaria (643.1 %), Lithuania (634.5 %), Latvia (533.5 %), Luxembourg (490.6 %), Estonia (473.7 %), Hungary (440.1 %) and Poland (370.6 %).



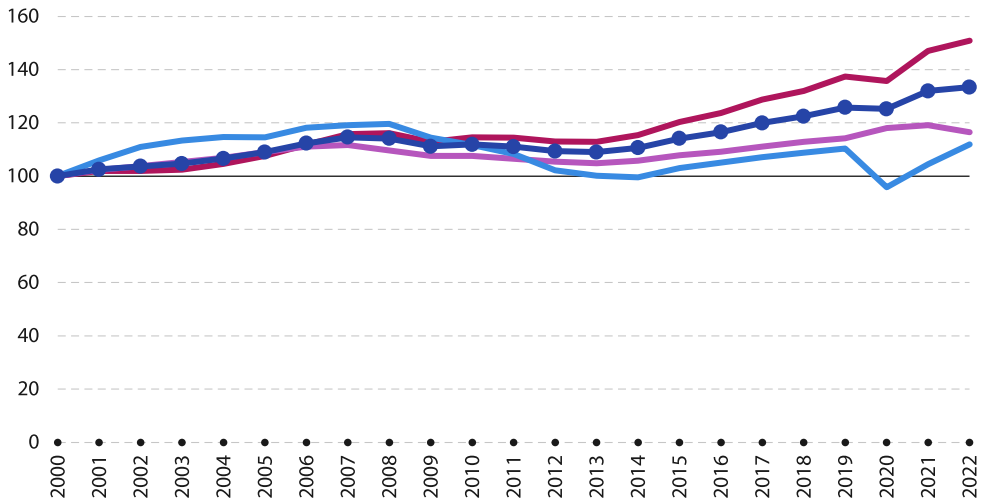
Note: based on turnover value indices. IE, NL and PT: not available.

Source: Eurostat (online data code: sts_trtu_a)



Volume of sales index for retail trade

(2000 = 100, EU, 2000–2022)



- Retail trade – total
- Retailing of non-food products
- In-store retailing of food, beverages and tobacco
- Specialised retailing of automotive fuel

Note: deflated turnover indices. Retail trade covers NACE Rev. 2 Division 47. Retailing of non-food products: also includes all retail trade not in stores. Annual aggregates are based on calendar adjusted data.

Source: Eurostat (online data code: sts_trtu_a)

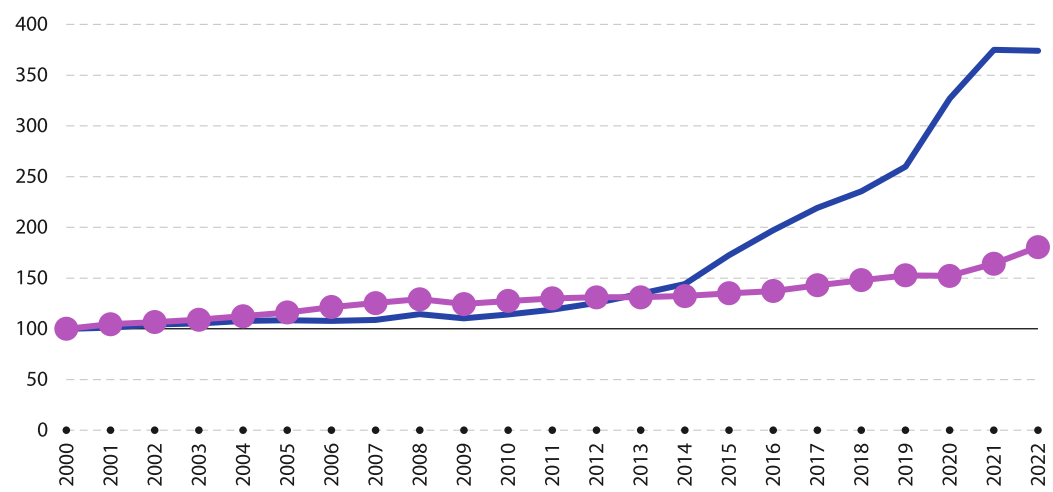
The volume of sales index for retail trade is adjusted for price changes in the goods that are sold. Between 2000 and 2022, this index increased 33 % overall in the EU, compared with an increase of 81 % for the retail trade turnover index (in current price terms). An overall increase (in volume terms) was observed between 2000 and 2022 for three types of retailing: non-food, food, and automotive fuel retailing. Non-food retailing increased the most, up 51 % overall, while food retailing increased 17 % and automotive fuel retailing was up 12 %.

The COVID-19 pandemic had a diverging impact on the retail sale of these goods. The volume of sales for food was up 3.4 % in 2020, while a relatively small decline was recorded for non-food products (down 1.2 %) and a considerable decline for automotive fuel (down 13.2 %).

The volume of sales for food continued to follow an upward trajectory in 2021 but at a more subdued pace and fell in 2022. Sales within non-food retailing grew by 8.3 % in 2021, approximately double the next highest growth recorded in any of the previous 20 years, and by 2.6 % in 2022. Growth for the retailing of automotive fuel was 9.0 % in 2021 and 7.1 % in 2022, thereby more than recovering the decline observed in 2020.

Turnover index for retail trade and retail sale via mail order houses or via internet

(2000 = 100, EU, 2000–2022)



Note: turnover value indices. Retail trade covers NACE Rev. 2 Division 47 and retail sale via mail order houses or via internet covers NACE Rev. 2 Class 47.91. Annual aggregates are based on calendar adjusted data.

Source: Eurostat (online data code: sts_trtu_a)

- Retail sale via mail order houses or via internet
- Retail trade – total

As already noted, internet retailing has gained in significance over many years. Between 2000 and 2022, the EU turnover index for retail sale via mail order houses or via internet increased 274 %, corresponding to an average of 6.2 % per year. For comparison, the average increase for retail trade as a whole was 81 %, equivalent to 2.7 % per year. Turnover growth for retail sale via mail order houses or via internet was relatively modest before 2008, was generally higher thereafter and was particularly strong between 2015 and 2021: annual growth rates were 10 % or higher in six out of these seven years. In 2022, this period of sustained growth ended, as a small contraction in turnover for retail sale via mail order houses or via internet was recorded, down 0.3 %.



For continuously updated visualisations containing time series for retail trade:



6

Other non-financial services



Structure

Other non-financial services include seven economic activities: transportation and storage; accommodation and food services; information and communication services; real estate activities; professional, scientific and technical services; administrative and support services; repair of computers and personal and household goods. In value added terms, the largest of these activities in the EU in 2020 was professional, scientific and technical activities, with a 24.4 % share of the total.

Concentration of other non-financial services activity – top five EU Member States

(% share of EU employment and value added for each activity, 2020)

EU other non-financial services in 2020

11.8 million enterprises

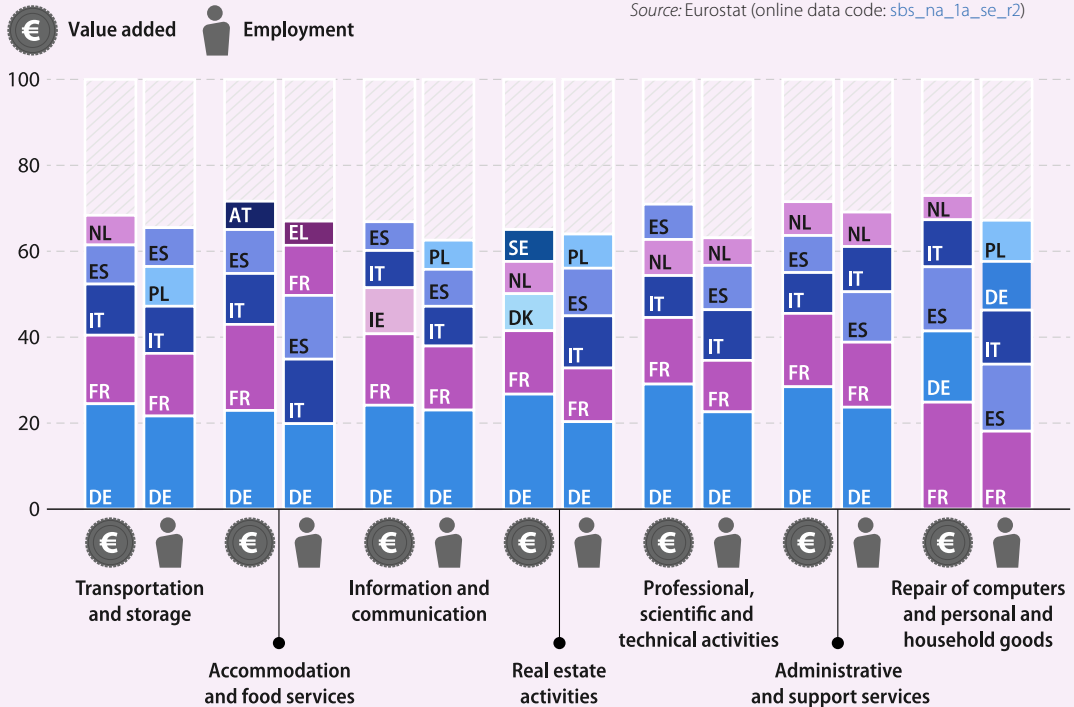
52.9 million persons employed

€2.44 trillion of value added

In 2020, Germany had the highest share of EU value added for six of the seven activities within other non-financial services and was (for these six) followed by France. The order of these two EU Member States was reversed for the repair of computers and personal and household goods. For four of the seven subsectors, Italy had the third highest share of value added. Ireland was the third largest contributor to the EU's value added in information and communication services, Denmark the third largest in real estate activities and Spain the third largest in the repair of computers and personal and household goods.

In terms of employment, Germany had the highest share of the EU total for the same six subsectors. For five of these, France recorded the second highest share; Italy had the second largest workforce for accommodation and food services. France had the largest share of EU employment for the repair of computers and personal and household goods.

Source: Eurostat (online data code: sbs_na_1a_se_r2)



Value added specialisation – top five EU Member States

(% share of other non-financial services value added, 2020)

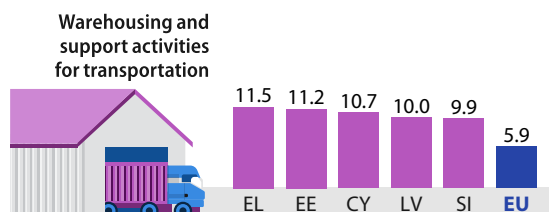
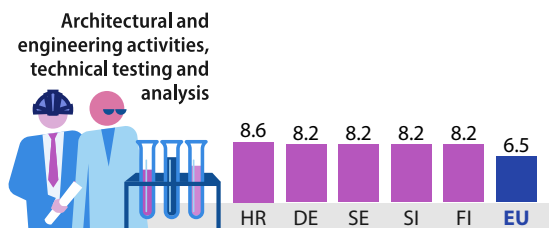
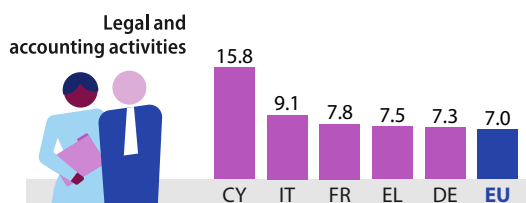
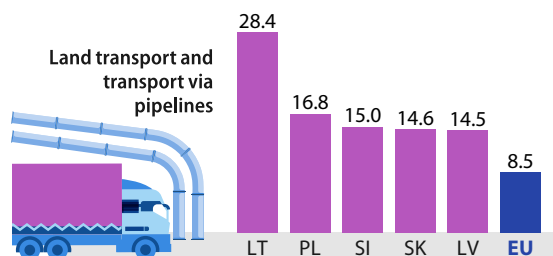
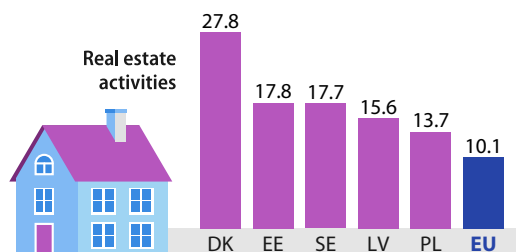
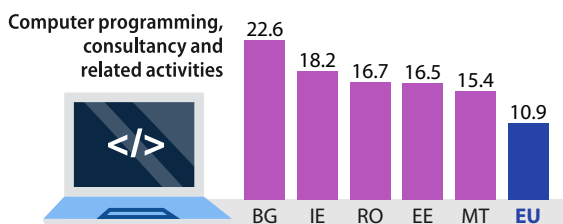
In value added terms, the largest other non-financial service divisions in the EU in 2020 were: computer programming, consultancy and related activities; real estate activities; land transport and transport via pipelines; legal and accounting activities; architectural and engineering activities, technical testing and analysis; and warehousing and support activities for transportation. Compared with 2019, architectural and engineering activities, technical testing and analysis entered the top six largest activities for the EU. Food and beverage service activities dropped out of the top six, reflecting the impact of restrictions on this subsector.

Bulgaria and Ireland were the most specialised EU Member States in computer programming, consultancy and related activities, with 22.6 % and 18.2 %, respectively, of their non-financial services value added in this activity. Denmark was highly specialised in real estate activities, adding 27.8 % of its other non-financial services value added in this activity. Lithuania was by far the most specialised in land transport and transport via pipelines with 28.4 % of its value added in other non-financial services recorded in this subsector.

The most specialised EU Member State in legal and accounting activities was Cyprus, recording 15.8 % of its value added in non-financial services in this subsector, more than double the EU average (7.0 %). There was less specialisation in architectural and engineering activities, technical testing and analysis: the highest share was 8.6 % in Croatia, compared with the EU average of 6.5 %. Greece was the most specialised EU Member State in warehousing and support activities for transportation, with 11.5 % of its value added in other non-financial services in this subsector.

Note: data are shown for the six largest other non-financial services based on EU value added for NACE Rev. 2 other non-financial service divisions. Computer programming, consultancy and related activities: EU excluding LU; LU not available. Real estate activities: FI not available. Legal and accounting activities: LU not available. Architectural and engineering activities; technical testing and analysis: EU excluding BE; BE not available. Warehousing and support activities for transportation: LU not available.

Source: Eurostat (online data code: sbs_na_1a_se_r2)

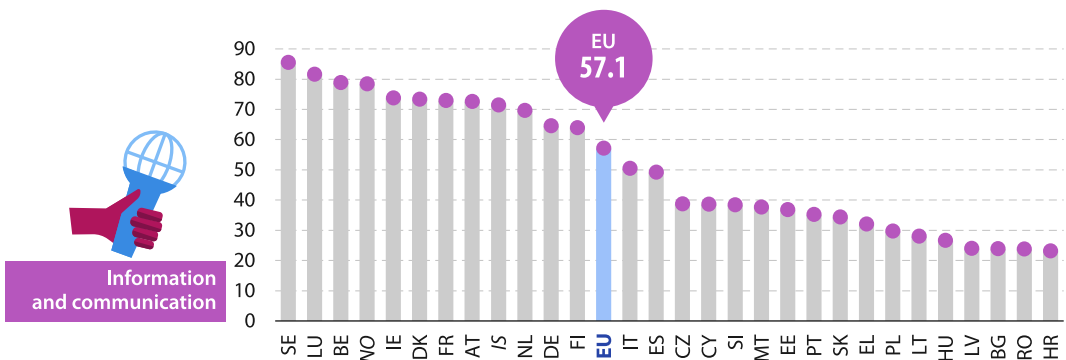
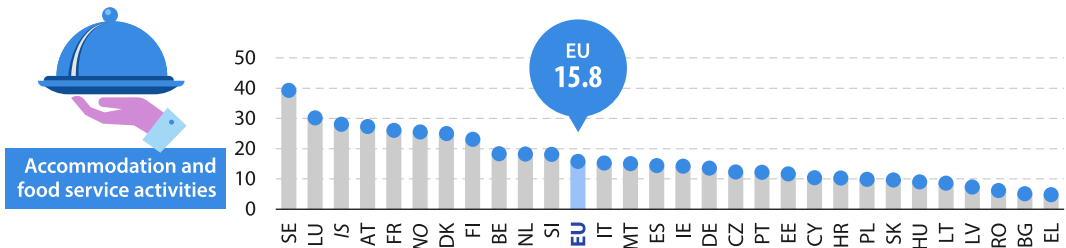
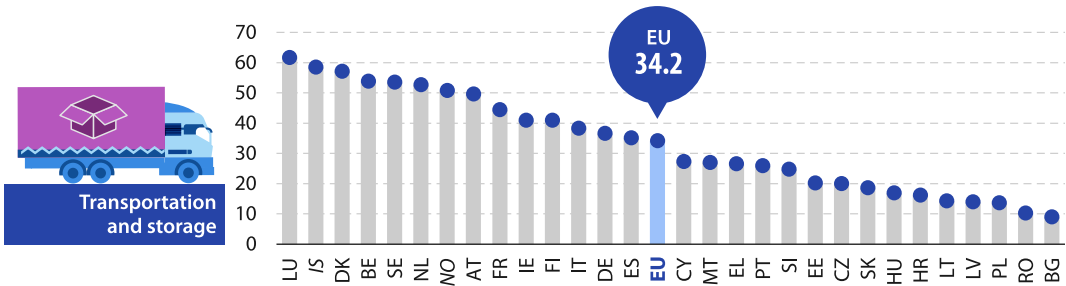


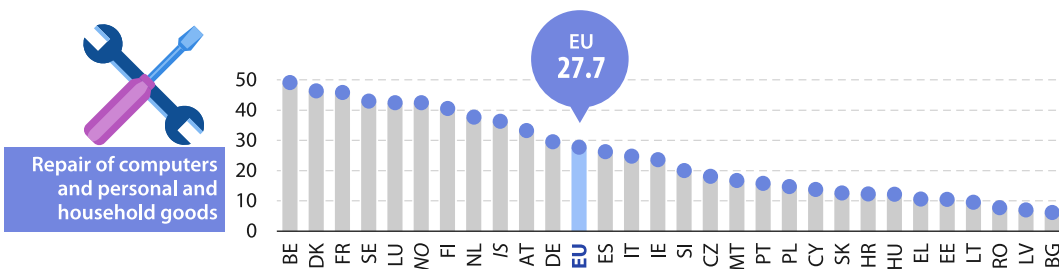
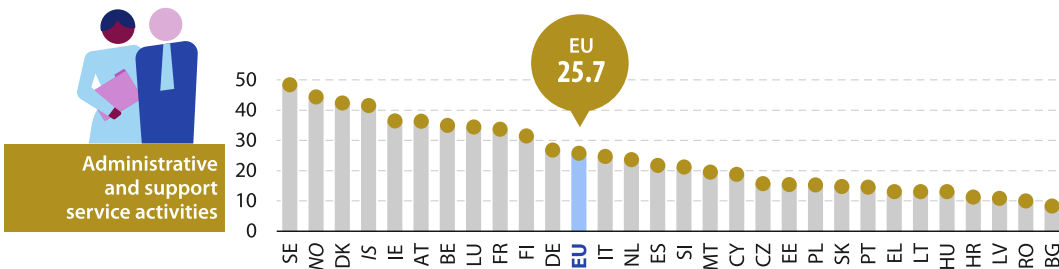
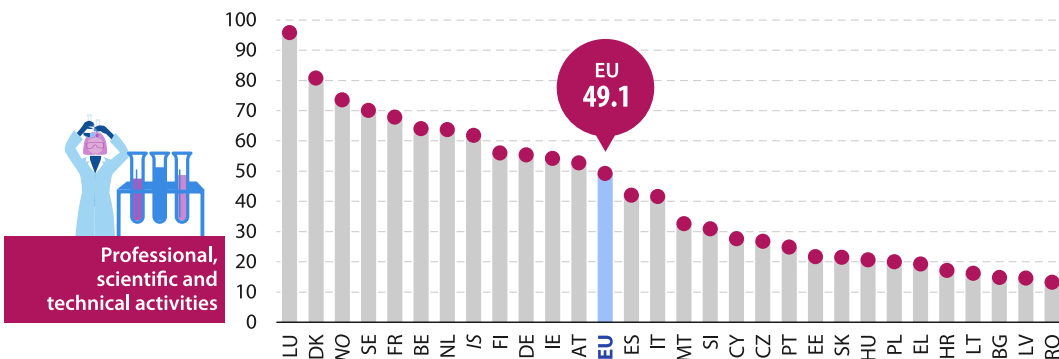
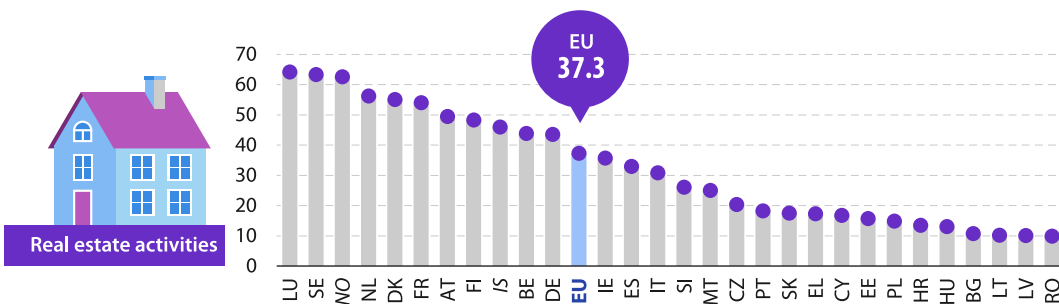
Average personnel costs within other non-financial service sections

(€1 000 per employee, 2020)

Typically, the lowest average personnel costs across the EU can be observed in activities with a high incidence of part-time and seasonal work, such as accommodation and food services (€15 800 per employee) or administrative and support service activities (€25 700 per employee), whereas higher ratios can be seen for professional, scientific and technical activities (€49 100 per employee) or information and communication services (€57 100 per employee).

Source: Eurostat (online data code: sbs_na_1a_se_r2)

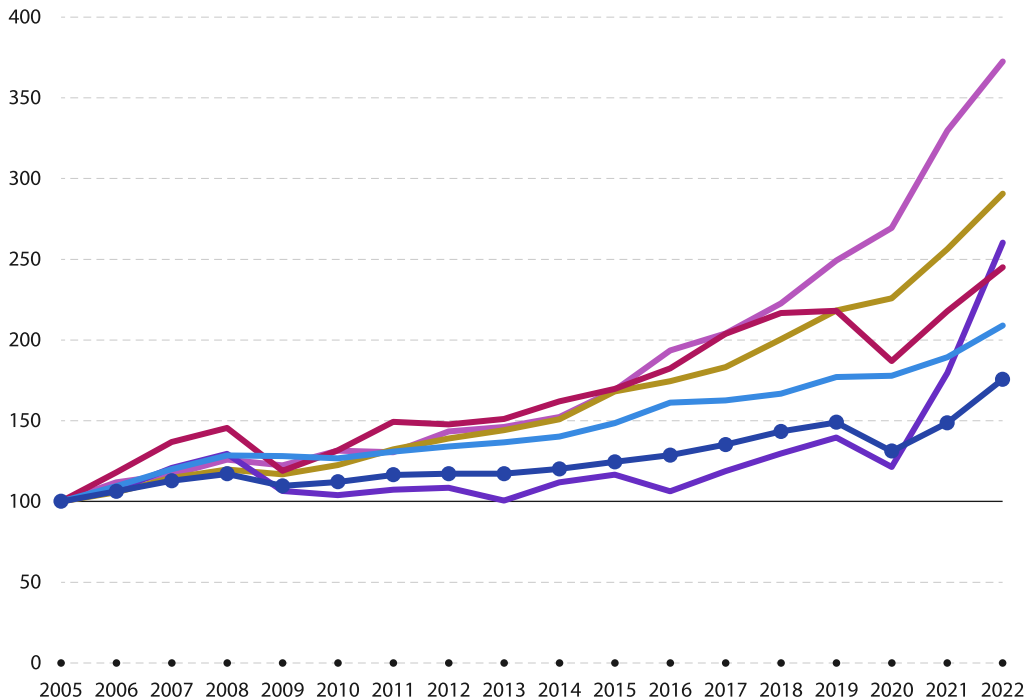




Developments

Turnover index for high-growth non-financial services

(2005 = 100, EU, 2005–2022)



- **Non-financial services (excl. distributive trades) - total**
- **Information service activities**
- **Computer programming, consultancy and related activities**
- **Water transport**
- **Employment activities**
- **Security and investigation activities**

The **turnover index** illustrates the development of sales in current prices; in other words, this **index** has not been adjusted to remove the effects of **price changes**. Between 2005 and 2022, the EU turnover index for non-financial services (excluding distributive trades) increased 76 % overall, equivalent to an average of 3.4 % per year. Between 2005 and 2008, the index increased in a fairly regular manner. A fall of 6.4 % was observed in 2009, followed by relatively subdued growth in most years between 2010 and 2019. In 2020, the EU turnover index for non-financial services (excluding distributive trades) fell 12.0 %, reflecting the impact of the COVID-19 pandemic. It rebounded 13.4 % the following year and increased 18.1 % in 2022, the latter largely resulting from a high level of inflation.

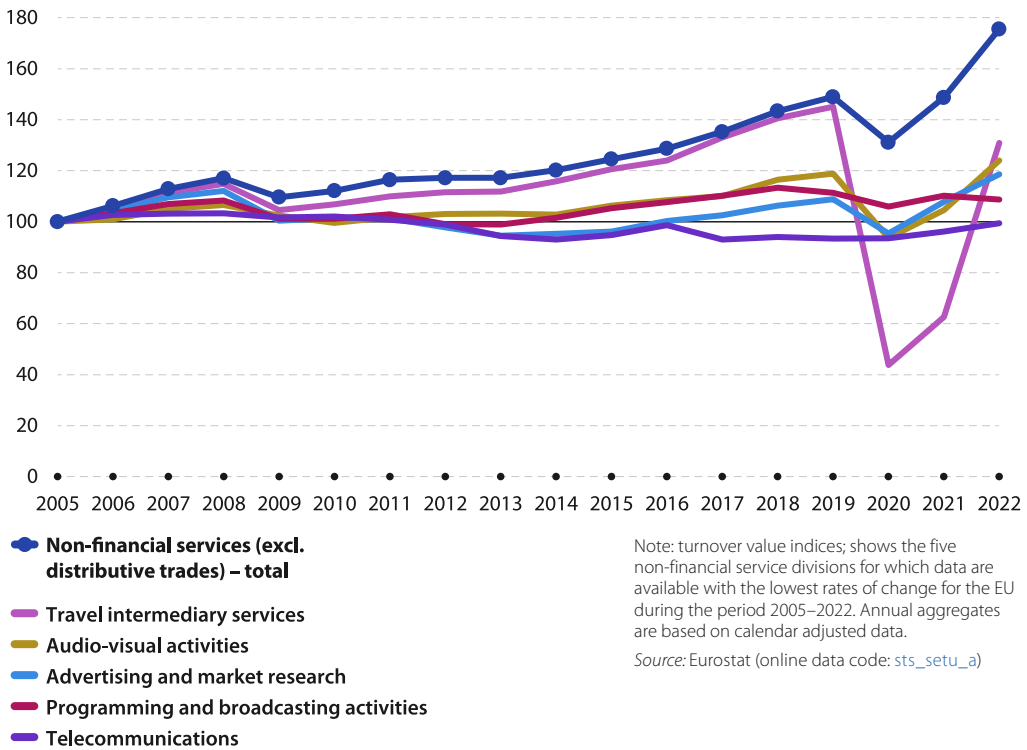
In turnover terms, the fastest growing non-financial service within the EU was information service activities, as sales were 3.7 times as high in 2022 as they had been in 2005, an annual average increase of 8.0 %. Turnover for computer programming, consultancy and related activities also increased strongly, 2.9 times as high in 2022 as in 2005. Three (other) activities more than doubled their turnover during this period: water transport activities; employment activities; and security and investigation activities.

Note: turnover value indices; shows the five non-financial service divisions with the highest rates of change for the EU during the period 2005–2022. Annual aggregates are based on calendar adjusted data.

Source: Eurostat (online data code: [sts_setu_a](#))

Turnover index for low-growth non-financial services

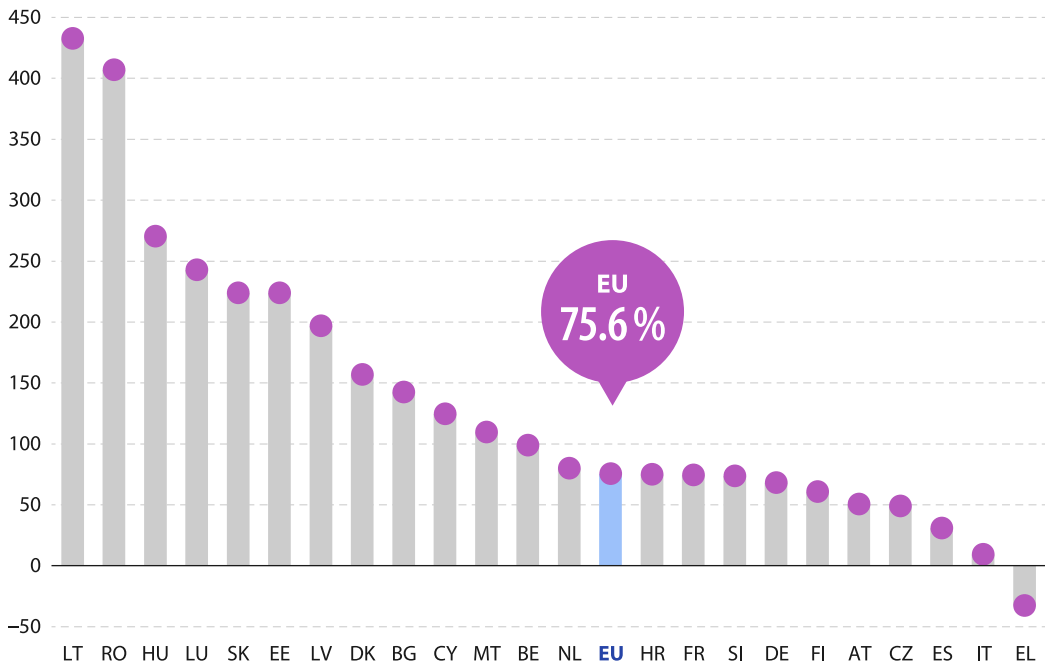
(2005 = 100, EU, 2005–2022)



For telecommunications, the EU had a level of turnover in 2022 that was marginally below that recorded in 2005 (down 0.6 %). Four non-financial service activities within the EU reported overall turnover growth between 2005 and 2022 that was less than 50 %: programming and broadcasting activities; advertising and market research; motion picture, video and television programme production, sound recording and music publishing activities (referred to as audio-visual activities); and travel agency, tour operator and other reservation service and related activities (referred to as travel intermediary services). Some of these activities were particularly strongly impacted by the COVID-19 crisis, most notably travel intermediary services.

Overall change in the non-financial services turnover index

(%, 2005–2022)



Note: based on turnover value indices. BG: 2008–2022. EL, FR, HR and SI: 2005–2021. IT and FI: 2010–2022. IE, PL, PT and SE: not available.

Source: Eurostat (online data code: sts_setu_a)

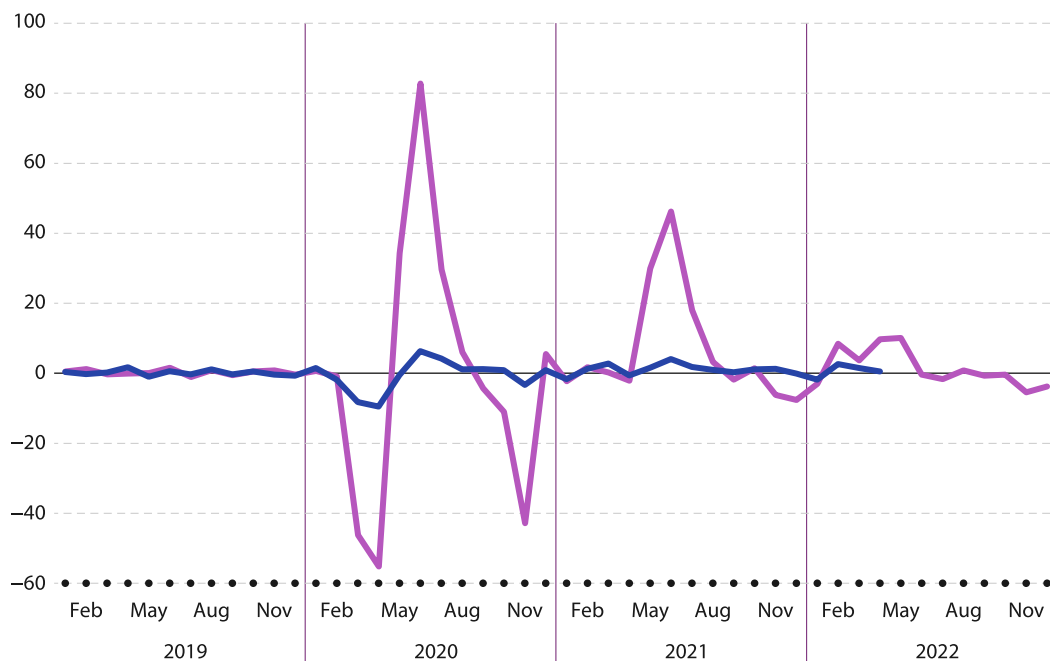
Among the EU Member States for which data are available, all except for Greece reported higher turnover for non-financial services in the latest year (2021 or 2022) than in 2005. Turnover growth was highest in Lithuania and Romania, as sales were more than five times as high in 2022 as in 2005 (up 432.7 % and 407.0 %, respectively). By contrast, sales from non-financial services activities were up 30.8 % in Spain and 9.4 % in Italy (2010–2022), while in Greece a fall of 32.6 % was observed between 2005 and 2021.



Monthly data for 2020, and to a lesser extent 2021, show the impact of the COVID-19 pandemic on services. More recent data may be impacted by a wider range of issues, for example the aftereffects of the COVID-19 crisis, the impact of the Russian military aggression against Ukraine and the related sanctions, and higher levels of inflation.

Non-financial services production indices

(%, change compared with the previous month, EU, January 2019–December 2022)



— Non-financial services (excluding distributive trades) – total

— Accommodation and food services

Note: non-financial services, May-December 2022 not available. Seasonally and calendar adjusted data.

Source: Eurostat (online data code: sts_sepr_m)

During the first wave of the pandemic, the main decline in the output (deflated turnover) of non-financial services (excluding distributive trades) was in March and April 2020, with a partial recovery in May and June.

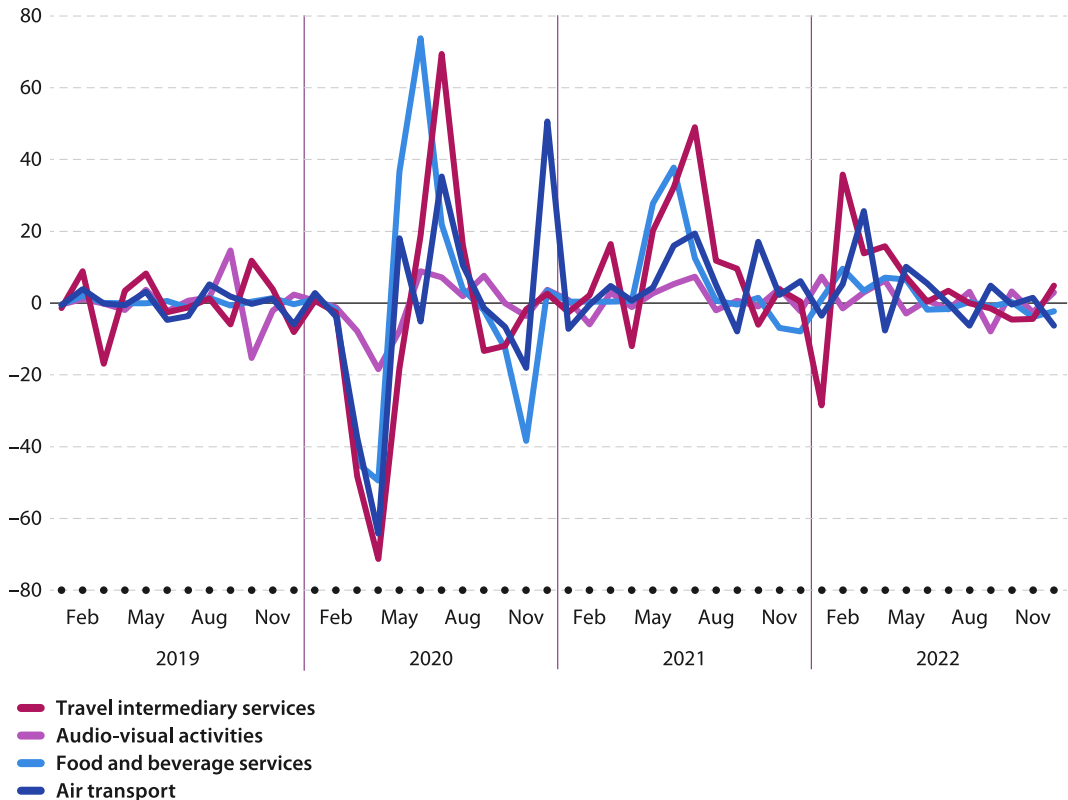
To assess the initial impact, output in April 2020 can be compared with that in February 2020. The strongest decline across the EU among services sections was recorded for accommodation and food services (output fell 75.9%). Whereas output for many non-financial services rebounded and then stabilised after this initial shock, volatility remained for accommodation and food services.

There was a strong rebound in accommodation and food services output in the EU from May to July 2020 and then a second strong contraction between September and November 2020. Relatively strong growth was observed again from May to July 2021. In winter 2021/22 into spring 2022 further volatility was observed, although more subdued than earlier in the crisis. While monthly decreases were recorded for output most months in the second half of 2022, the rates of change were generally more subdued than in the three previous periods of contraction.

As of December 2022, the output for accommodation and food services in the EU remained 4.9% below the level it had been in February 2020.

Production indices for the four non-financial services divisions most impacted during the COVID-19 pandemic

(%, change compared with the previous month, EU, January 2019–December 2022)



Looking in more detail, namely at non-financial services divisions, several activities experienced a sharp fall in output at the onset of the pandemic. Between February and April 2020, EU production fell 85.1 % for travel intermediary services, 77.6 % for air transport services, and 71.9 % for food and beverage services; the next largest fall was 24.8 % for audio-visual activities. By contrast, the least affected non-financial services during the first wave of the pandemic were: telecommunications; computer programming, consultancy and related activities; postal and courier activities; and publishing activities.

While there was a partial recovery in late spring / early summer 2020, the picture was mixed, with hospitality and transport services (among others) continuing to face a range of restrictions in some EU Member States. Furthermore, most Member States reintroduced restrictions on hospitality and transport businesses (among others) at various stages during the pandemic.

By December 2022, EU output for travel intermediary services remained 14.4 % lower than it had been in February 2020, while the output of air transport services was 5.7 % lower, that of food and beverage services 3.8 % lower, and that of programming and broadcasting activities 0.8 % lower.

Note: the four non-financial service (excluding distributive trades) divisions most impacted by the COVID-19 pandemic were selected on the basis of the change in EU production indices between February and April 2020. Note that a time series is not available for accommodation services. Seasonally and calendar adjusted data.

Source: Eurostat (online data code: sts_sepr_m)

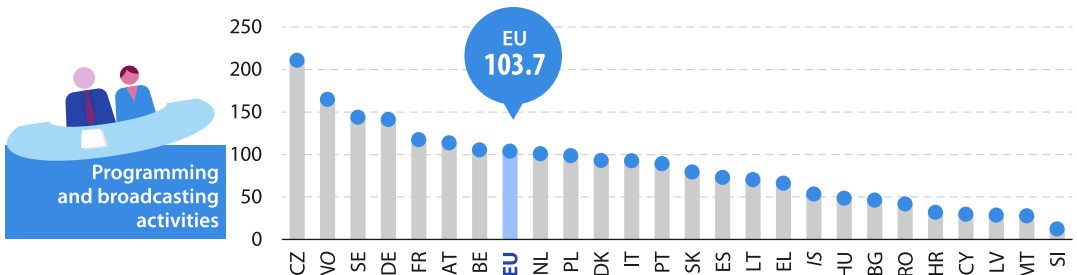
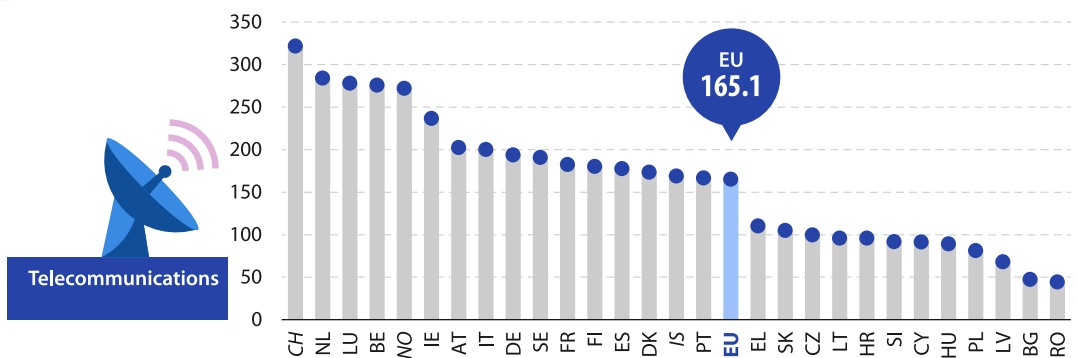
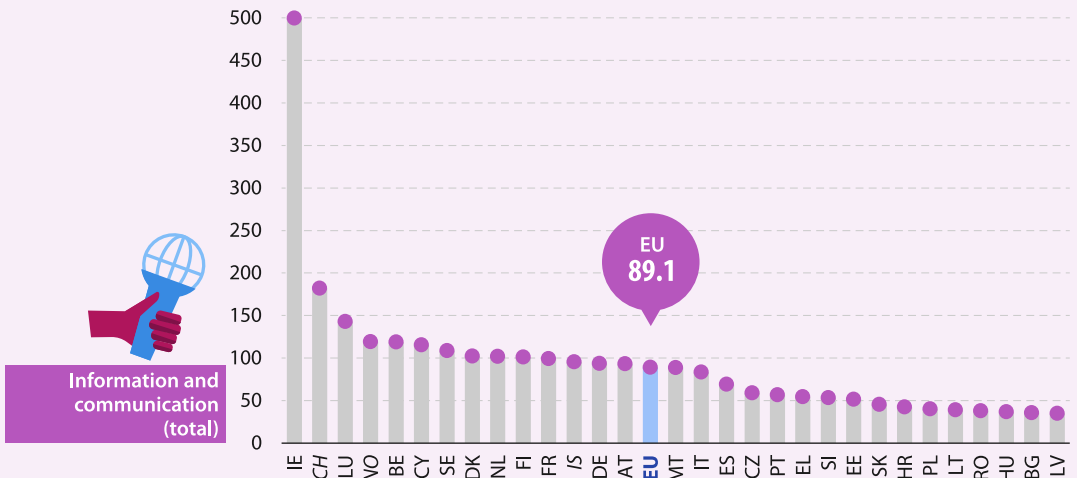
For continuously updated visualisation containing time series for services:

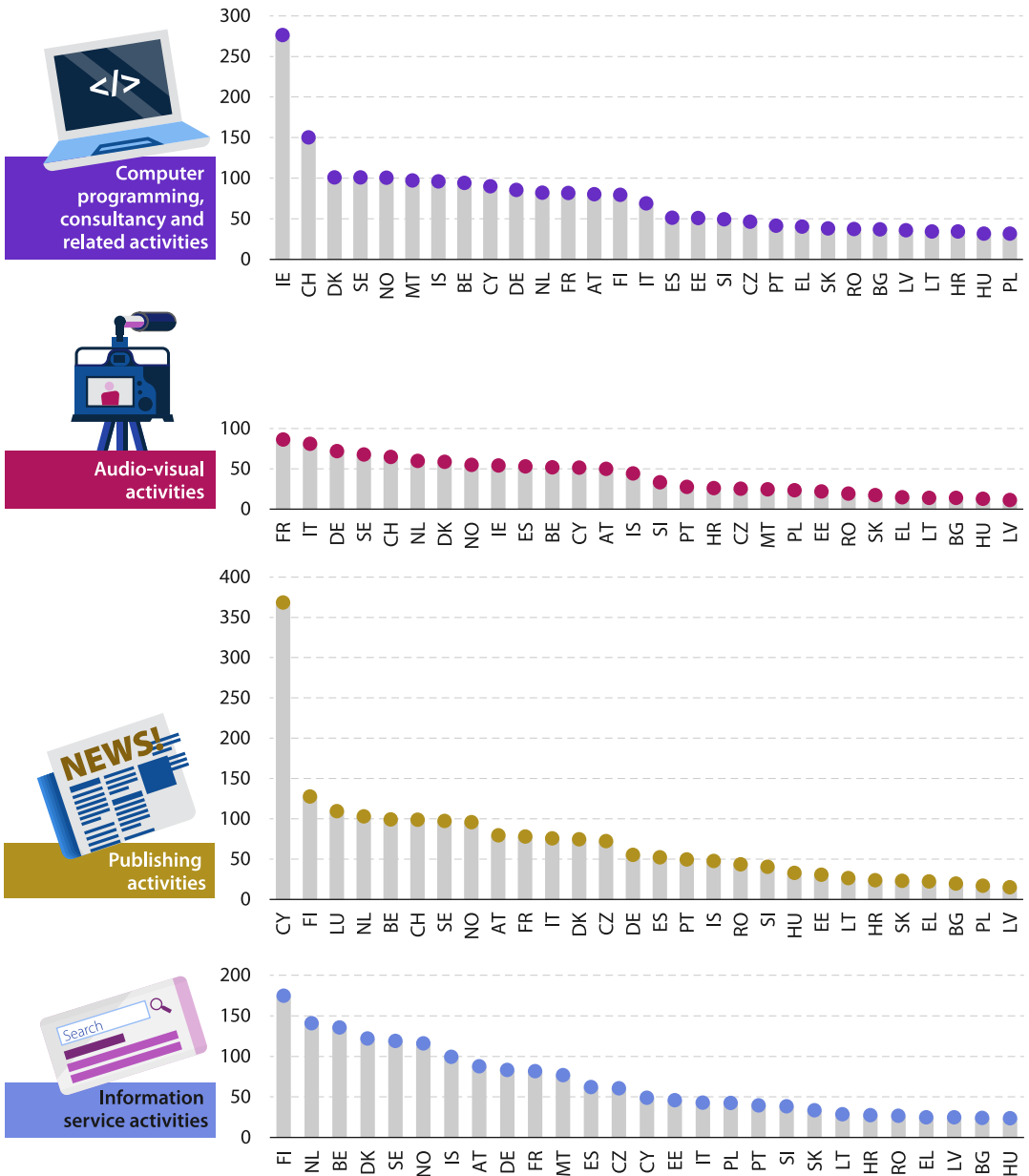


Focus on information and communication services

Apparent labour productivity for information and communication services

(€1 000 per person employed, 2020)





Apparent labour productivity is calculated from value added divided by the number of persons in employment.

The EU's information and communication services had the second highest apparent labour productivity of all other non-financial services sections in 2020, lower only than that of the capital-intensive real estate section. At a more detailed level, the highest levels of apparent labour productivity within information and communication services were observed for telecommunications as well as programming and broadcasting activities.

Telecommunications: EE and MT not available.
 Programming and broadcasting activities: EE, IE, LU, FI and CH not available.
 Computer programming, consultancy and related activities: EU and LU not available.
 Audio-visual activities: EU, LU and FI not available.
 Publishing activities: EU, IE and MT not available.
 Information service activities: EU, IE, LU and CH not available.

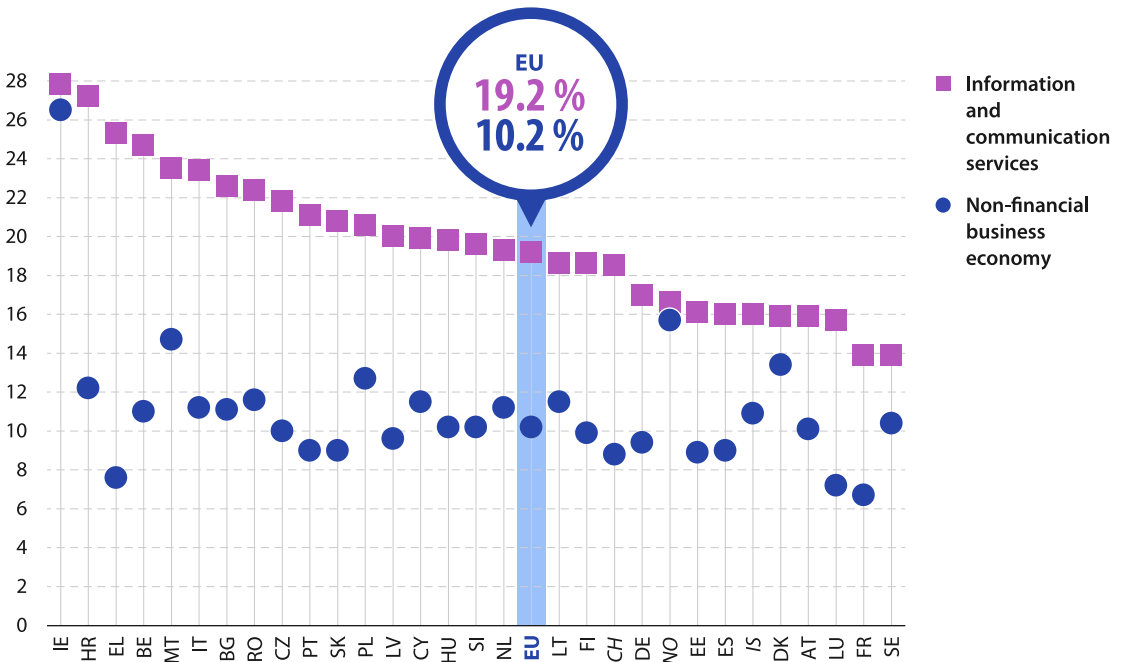
Source: Eurostat (online data code: [sbs_na_1a_se_r2](#))

Gross operating rate for information and communication services

(%, 2020)

The **gross operating rate** is a measure of profitability and is defined as value added at factor cost minus **personnel costs** (the **gross operating surplus**) divided by total **turnover**. In all EU Member States, information and communication services recorded a gross operating rate in 2020 that was above the **non-financial business economy** average. Greece, Croatia and Belgium had particularly high rates for information and communication services, around 14–18 **percentage points** above their non-financial business economy averages. In relative terms, the difference was greatest in Greece, as the gross operating rate for information and communication services was 25.3 %, which was 3.3 times as high as the non-financial business economy average of 7.6 %.

Source: Eurostat (online data codes: sbs_na_1a_se_r2 and sbs_na_sca_r2)



Exports of telecommunications, computer and information services

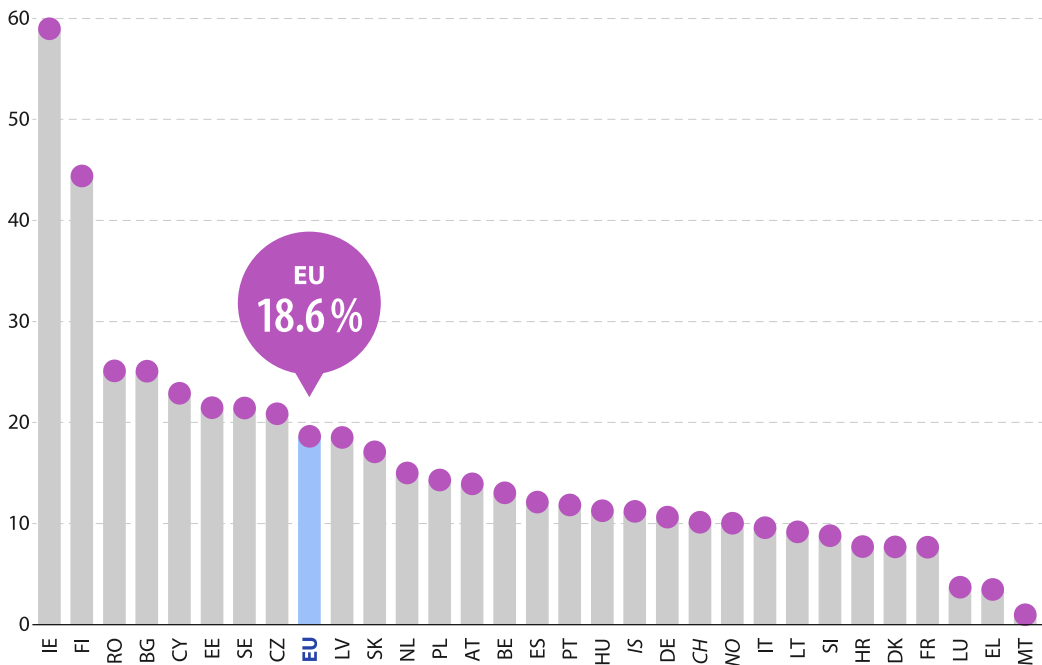
(%, share of total exports of services, 2021)

Telecommunications, computer and information services represented an 18.6 % share of total exports of services from the EU to all countries of the world in 2021. Exports of telecommunications, computer, and information services contributed 58.9 % of all services exports from Ireland, by far the highest share among the EU Member States.

These services contributed 44.4 % of all services exports in Finland and around one quarter in Romania (25.1 %) and Bulgaria (25.0 %). By contrast, in Luxembourg and Greece telecommunications, computer, and information services contributed 3.7 % and 3.4 % of all services exports, while in Malta the share was 0.9 %.

Note: telecommunications, computer and information services form part of the services account. The data presented cover total exports of services, in other words, exports to (other) EU Member States and to non-EU countries.

Source: Eurostat (online data code: [bop_its6_det](#))



7

Tourism

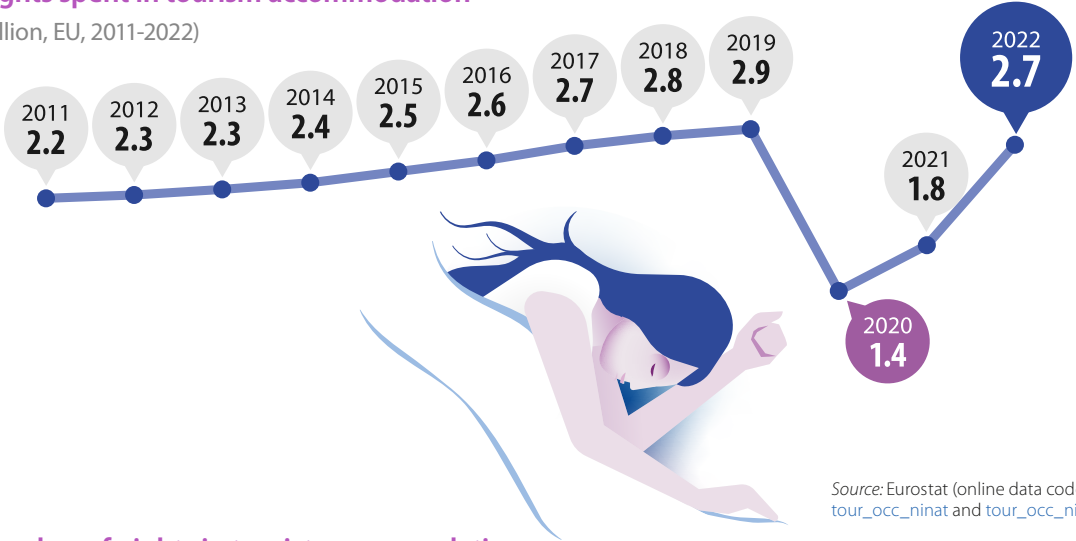


Structure

Tourism is travel to a destination away from home for less than one year, for pleasure, business or other personal reason.

Nights spent in tourism accommodation

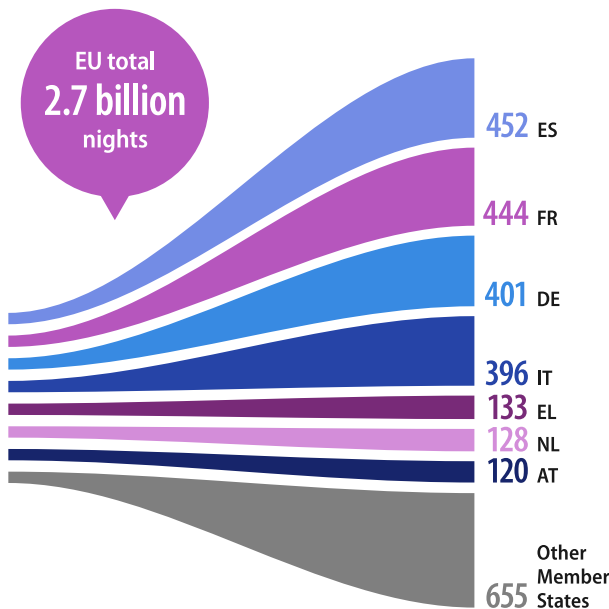
(billion, EU, 2011-2022)



Source: Eurostat (online data codes: tour_occ_ninat and tour_occ_nim)

Number of nights in tourist accommodation

(million nights spent, 2022)



Source: Eurostat (online data code: tour_occ_ninat)

Between 2011 and 2019, the number of nights spent in tourist accommodation in the EU increased at an average rate of 3.1 % per year. This sustained period of growth was followed by a sharp contraction (down 50.5 %) in 2020, as the COVID-19 crisis started, a partial rebound in 2021 (up 28.8 %) and stronger growth in 2022 (up 48.9 %).

In 2022, 2.7 billion nights were spent in tourist accommodation across the EU. This overall figure includes nights spent by domestic tourists (those travelling within their country of residence) and inbound international tourists (coming from other Member States or from non-EU countries). The largest markets in the EU were Spain, France, Germany and Italy, collectively recording 1.7 billion nights spent in tourist accommodation.

Capital city share of nights booked through booking platforms

(%, 2022)

Data on short-stay accommodation rentals are available from Airbnb, Booking, Tripadvisor and Expedia Group. In 2022, 547 million guest nights were spent in the EU in holiday rentals booked through one of these four platforms. This was above the 512 million nights recorded in 2019, before the onset of the COVID-19 crisis.

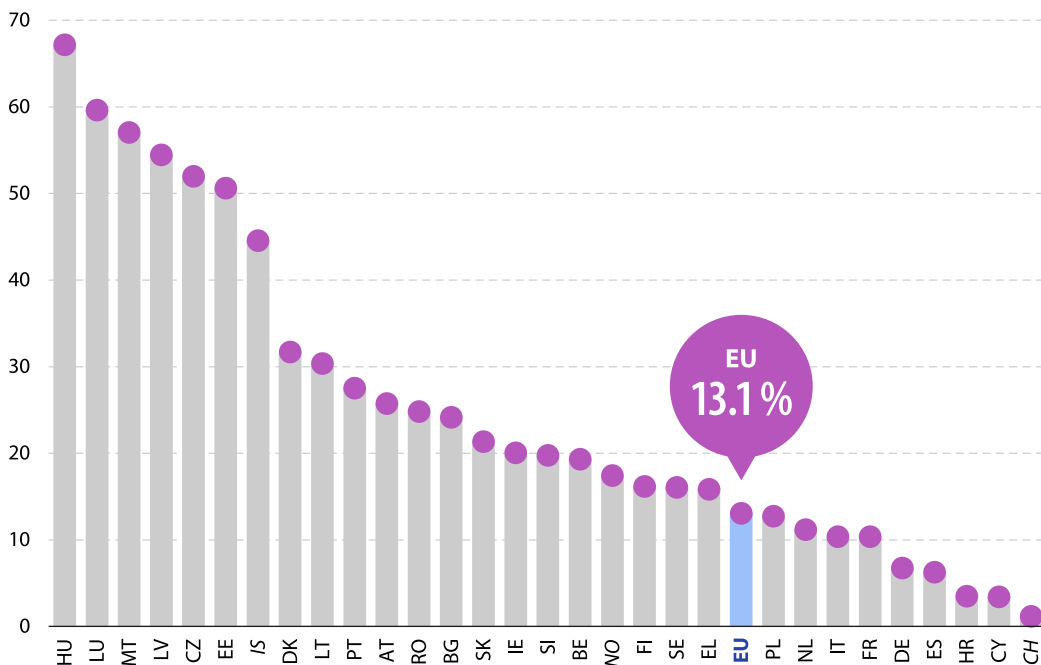
In 2022, more than half of the nights spent in accommodation booked through these platforms in Hungary, Luxembourg, Malta, Latvia, Czechia and Estonia were in the capital city. By contrast, this share was below 10.0 % in two of the larger EU Member States (Germany and Spain) and was under 5.0 % in Croatia and Cyprus.

Source: Eurostat (online data codes: [tour_ce_oarc](#) and [tour_ce_omr](#))

Experimental statistics on short-stay accommodation offered via online collaborative economy platforms

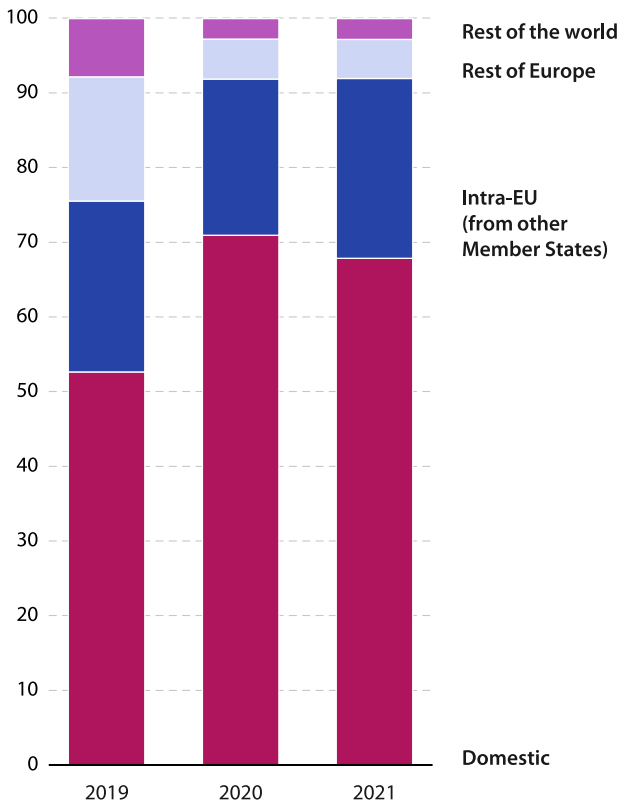
In 2020, the European Commission (Eurostat) signed agreements with four major booking platforms.

Eurostat now publishes data on short-stay accommodation booked through these platforms: these data are released quarterly as experimental statistics.



Nights spent in tourist accommodation according to the residence of tourists

(%, share of all tourist nights, EU, 2019–2021)



Source: Eurostat (online data code: [tour_occ_ninraw](#))

In 2021 domestic and intra-EU tourists accounted for **92.0%** of nights spent in tourist accommodation

Domestic tourists accounted for more than two thirds (67.9 %) of nights spent in tourist accommodation across the EU in 2021. Tourists from other EU Member States accounted for close to one quarter (24.1 %) of the total. As such, domestic and international tourists from within the EU accounted for 92.0 % of all nights spent in 2021, with international tourists from non-EU countries constituting the remaining 8.0 %. Among the nights spent by tourists from non-EU countries, by far the largest origin was the rest of Europe.

The share of nights spent in tourist accommodation across the EU in 2021 accounted for by international tourists from within the EU increased in 2021 compared with 2020 and surpassed the equivalent share observed in 2019 (before the COVID-19 crisis). By contrast, the share accounted for by international tourists from non-EU countries was similar in 2021 to the share in 2020 and therefore remained well below the share recorded in 2019.

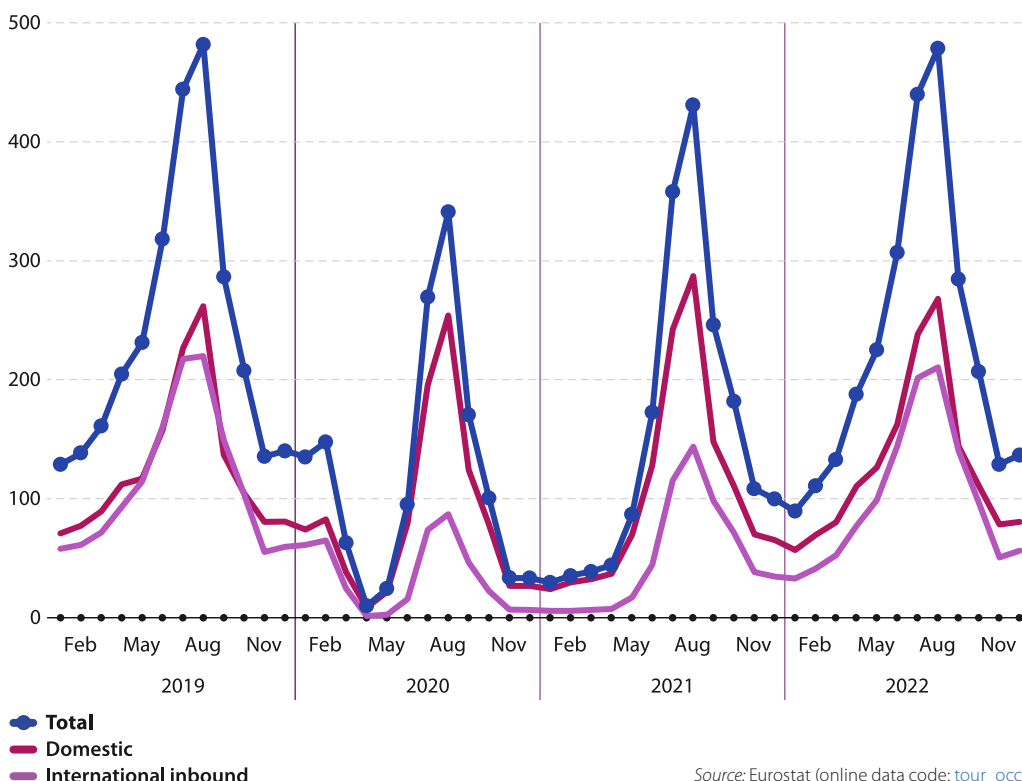
Read more in the continuously updated article on tourism:



Seasonality

Seasonality of nights spent in tourist accommodation

(million nights, EU, January 2019–December 2021)



Source: Eurostat (online data code: tour_occ_nim)

One of the key measures of tourism seasonality is monthly data for nights spent in tourist accommodation. The seasonal patterns for domestic tourists and international tourists were quite similar during 2019, with domestic tourists accounting for 48–59 % of the total nights spent, depending on the month. However, the share of domestic tourists was far higher during 2020 when they accounted for 55 % and 56 % respectively in January and February, before the COVID-19 outbreak, while for the remaining months this share ranged between 61 % and 90 % of the total nights spent in EU tourist accommodation. The lower level of demand from international

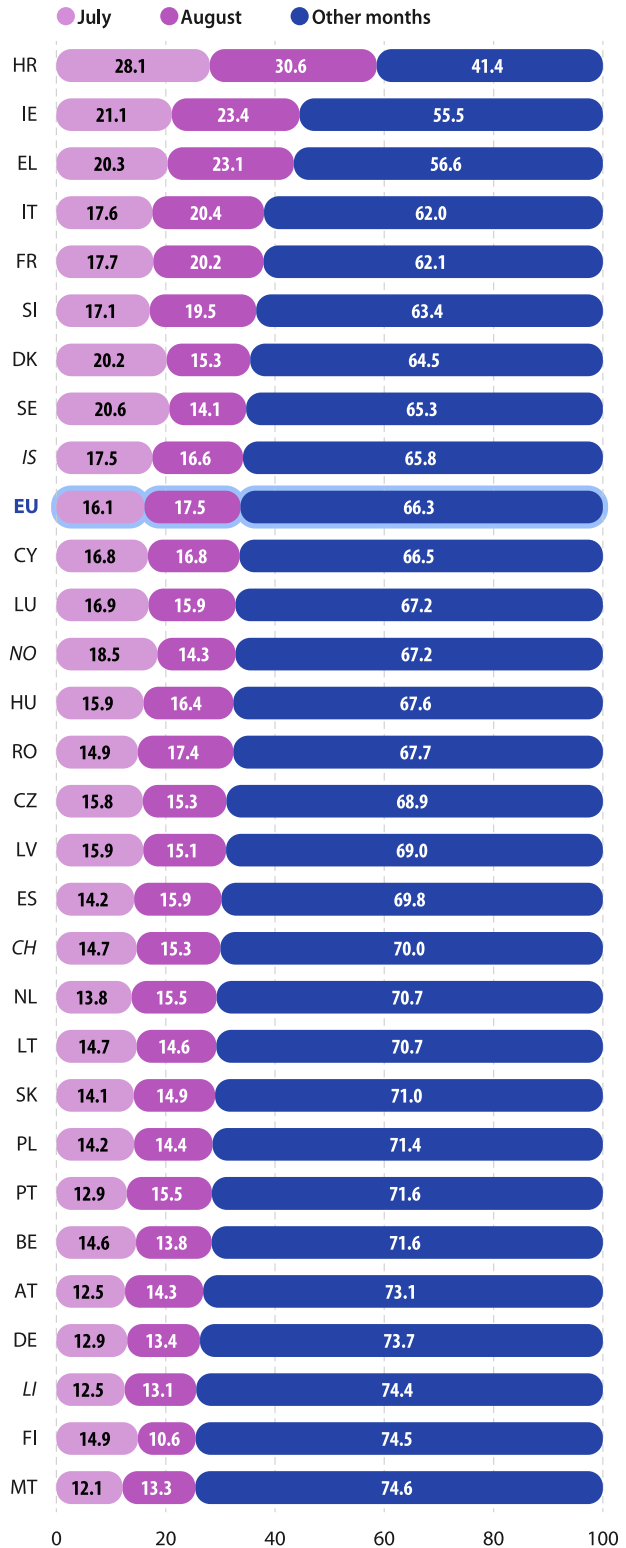
tourists likely reflects increased uncertainty during the COVID-19 pandemic, with this group primarily affected by cancelled transport services and/or travel restrictions.

In each month of 2021 and 2022, the share of domestic tourists remained above the shares observed during 2019, ranging from 51 % to 84 %. The difference compared with the monthly data for 2019 decreased most months during these two years. By the end of 2022, the relationship between the number of domestic and international tourists was almost the same as it had been at the end of 2019.

Nights spent in tourist accommodation in July and August

(%, share of annual nights spent, 2022)

In some EU Member States, tourism demand (represented here by the number of nights spent in tourist accommodation) is particularly concentrated in the summer months of July and August. This pattern was particularly notable in Croatia where nearly three fifths of all the nights spent in tourist accommodation in 2022 were recorded in these two months. By contrast, while it does have a summer bias, Malta is a year-round destination with demand spread more evenly across the calendar.



Note: IE and CH, 2021. BG and EE: not available.
Source: Eurostat (online data code: tour_occ_nim)

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KEY FIGURES ON

EUROPEAN BUSINESS

2023 EDITION

Key figures on European business presents a selection of key business statistics indicators for the European Union (EU) and its individual Member States, as well as the EFTA countries. This publication may be viewed as an introduction to European business statistics and provides a starting point for those who wish to explore the wide range of data that are freely available on Eurostat's website at <https://ec.europa.eu/eurostat> together with a range of online articles in *Statistics Explained*.

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