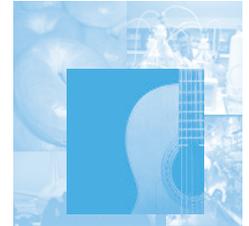


Furniture and other manufacturing activities



STRUCTURAL PROFILE

The furniture and other manufacturing sector (NACE Division 36) is among the smallest manufacturing sectors within the EU-27, with 227 500 enterprises accounting for EUR 51.0 billion of added value and employing some 1.9 million persons in 2004. These figures equate to a 1.0 % share of non-financial business economy (NACE Sections C to I and K) value added and a 1.5 % share of the number of persons employed in the EU-27's non-financial business economy, and as such indicates that apparent labour productivity was relatively low. The furniture subsector (NACE Group 36.1; see Subchapter 11.1) accounted for over two thirds (69.5 %) of the value added generated in this sector and contributed 72.7 % of employment. Among the other activities (see Subchapter 11.2) the largest in employment terms were miscellaneous manufacturing (NACE Group 36.6) with 248 000 persons employed and jewellery manufacture (NACE Group 36.2) with 121 600 persons employed.

Collectively the four largest Member States (Germany, Italy, the United Kingdom and France) generated 64.5 % of EU-27 value added in this sector, slightly below their average within the non-financial business economy average. Many of the Member States that joined the EU in 2004 or 2007 were relatively specialised in these activities, mainly due to a specialisation in one or two particular subsectors, as were Italy and to a lesser extent Austria and Portugal. The specialisation in some

regions within these countries (in some cases the whole country is treated as one region) can clearly be seen from the map on page 214 which is based on the non-financial business economy employment share of this sector. The three most specialised regions were in Poland, Italy and Romania, and these three countries, as well as Spain and Slovakia, had several regions specialised in these activities in employment terms, while Estonia, Lithuania and Slovenia (each treated as one region in the map) were also among the most specialised.

The EU-27's index of production for furniture and other manufacturing activities rose on average by 0.6 % per annum during the period 1996 to 2006, compared with an industrial (NACE Sections C to E) average of 2.1 %. The difference in these rates was largely due to diverging trends after 2001, as the output of furniture and other manufacturing activities contracted strongly in 2002 and 2003, and remained relatively unchanged in 2004 and 2005, while the production index for industry as a whole registered only one small contraction (2002) during the same period. Despite recording growth of 2.4 % in 2006, its strongest growth since 2000, this was still below the industrial average (3.7 %). Among the larger Member States Poland recorded remarkable increases in output during the ten years to 2006, averaging 11.5 % growth per annum. Over a shorter period, the five years to 2006, Lithuania, Romania, Bulgaria and Spain also recorded double-digit annual growth.

This chapter covers a number of unrelated manufacturing activities that are classified within NACE Division 36. The largest of these is furniture manufacturing (NACE Group 36.1), which is the subject of the first subchapter. The remaining activities include the manufacture of jewellery and related articles (NACE Group 36.2), musical instruments (NACE Group 36.3), sports goods (NACE Group 36.4), games and toys (NACE Group 36.5) and miscellaneous manufacturing (NACE Group 36.6) which includes for example the manufacture of brushes, pens, umbrellas and candles: these are all treated in the second subchapter.

NACE

- 36: manufacture of furniture; manufacturing n.e.c.;
- 36.1: manufacture of furniture;
- 36.2: manufacture of jewellery and related articles;
- 36.3: manufacture of musical instruments;
- 36.4: manufacture of sports goods;
- 36.5: manufacture of games and toys;
- 36.6: miscellaneous manufacturing n.e.c.

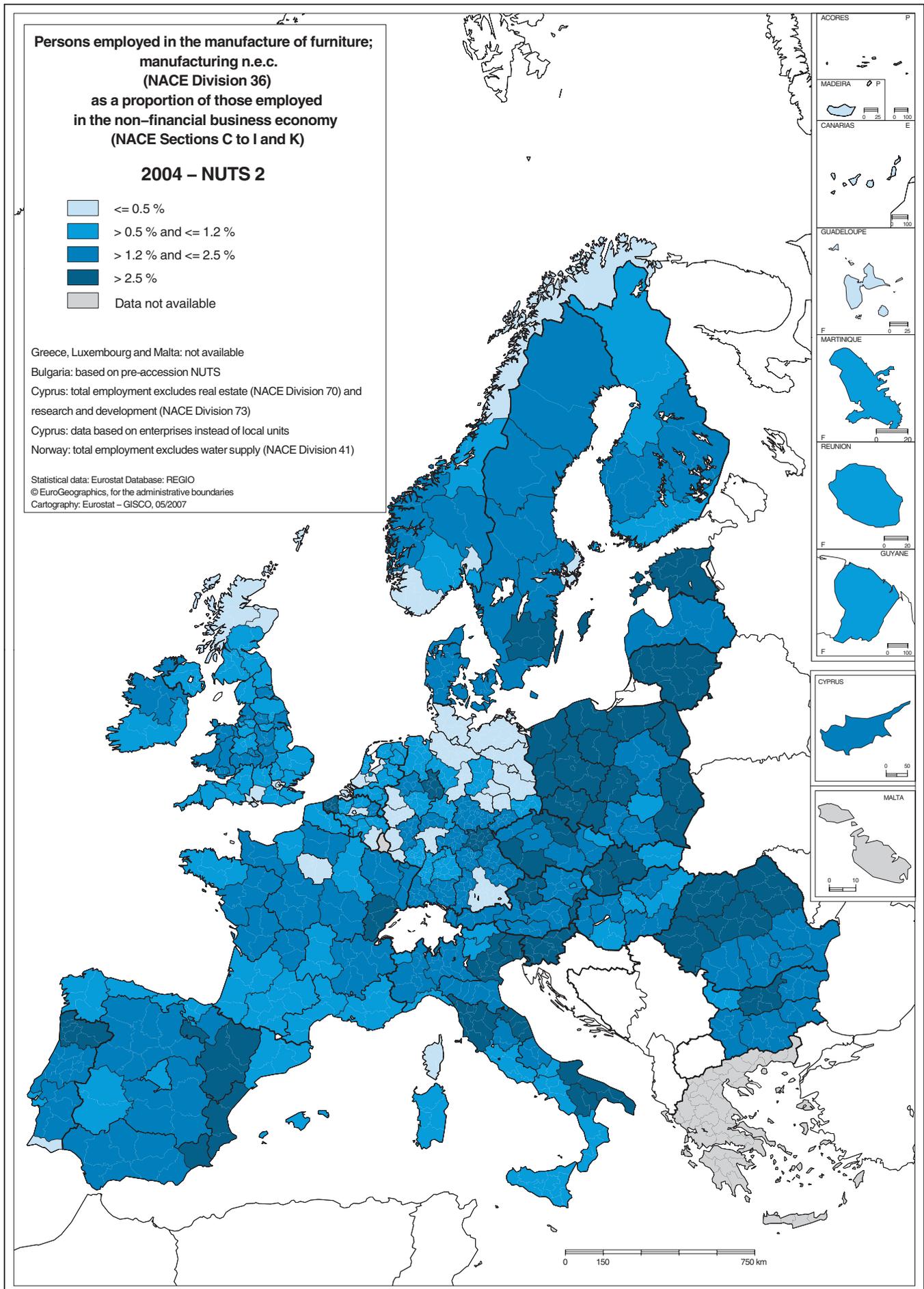


Table 11.1

Manufacture of furniture; manufacturing n.e.c. (NACE Division 36)
Structural profile, EU-27, 2004 (1)

	No. of enterprises		Turnover		Value added		Employment	
	(thousands)	(% of total)	(EUR million)	(% of total)	(EUR million)	(% of total)	(thousands)	(% of total)
Furniture; manufacturing n.e.c.	227.5	100.0	164 000	100.0	51 000	100.0	1 900.0	100.0
Furniture	143.8	63.2	117 860	71.9	35 467	69.5	1 381.5	72.7
Jewellery and related articles; musical instruments; sports goods; games and toys; miscellaneous manufacturing n.e.c.	84.0	36.9	46 000	28.0	15 600	30.6	500.0	26.3

(1) Rounded estimates based on non-confidential data.

Source: Eurostat (SBS)

Table 11.2

Manufacture of furniture; manufacturing n.e.c. (NACE Division 36)
Structural profile: ranking of top five Member States, 2004

Rank	Value added (EUR million) (1)	Employment (thousands) (2)	Share of non-financial business economy			
			No. of enterprises (3)	Turnover (4)	Value added (5)	Employment (6)
1	Germany (9 706)	Italy (298.1)	Slovenia (2.0 %)	Italy (1.5 %)	Lithuania (2.0 %)	Estonia (3.4 %)
2	Italy (9 165)	Germany (232.2)	Austria (1.8 %)	Estonia (1.5 %)	Estonia (2.0 %)	Lithuania (2.9 %)
3	United Kingdom (8 252)	Poland (212.2)	Poland (1.7 %)	Poland (1.5 %)	Slovenia (1.9 %)	Romania (2.9 %)
4	France (5 788)	United Kingdom (192.6)	Portugal (1.6 %)	Slovenia (1.4 %)	Romania (1.7 %)	Poland (2.8 %)
5	Spain (4 795)	Spain (176.5)	Netherlands (1.6 %)	Lithuania (1.4 %)	Poland (1.6 %)	Slovenia (2.8 %)

(1) Denmark, Ireland, Greece and Malta, not available; Bulgaria and Luxembourg, 2003.

(2) Bulgaria, Denmark, Ireland, Greece and Malta, not available; Luxembourg and Slovenia, 2003.

(3) Ireland, Greece, Cyprus and Malta, not available; Luxembourg, 2003.

(4) Bulgaria, Denmark, Ireland, Greece, Cyprus and Malta, not available; Luxembourg, 2003.

(5) Denmark, Ireland, Greece, Cyprus and Malta, not available; Bulgaria and Luxembourg, 2003.

(6) Bulgaria, Denmark, Ireland, Greece, Cyprus and Malta, not available; Luxembourg and Slovenia, 2003.

Source: Eurostat (SBS)

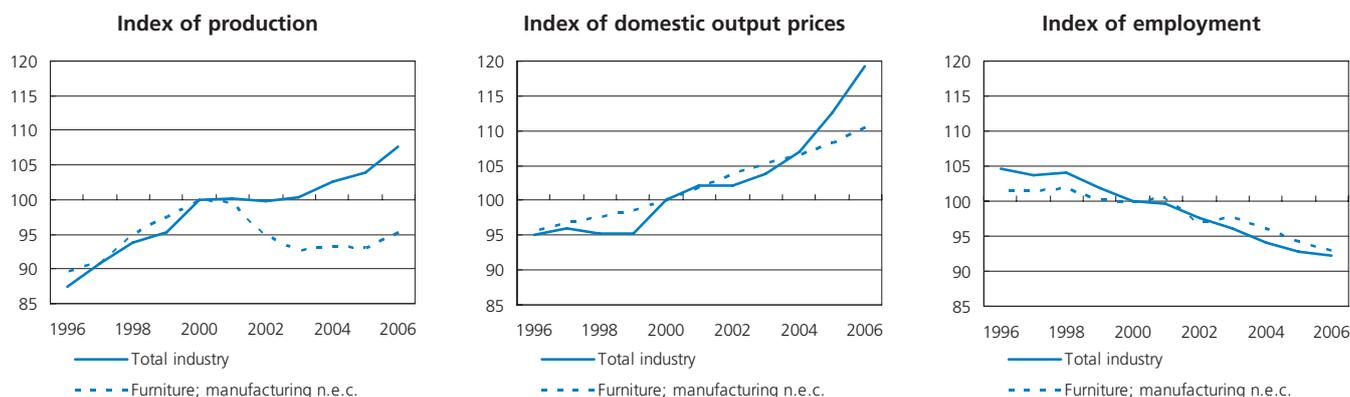
All of the NACE groups ⁽¹⁾ that make up furniture and other manufacturing activities recorded a decline in output in the EU-27 during the five years to 2006, ranging from -0.6 % and -0.7 % per annum for miscellaneous manufacturing and furniture manufacturing respectively to -5.4 % and -6.6 % per annum respectively for musical instruments manufacturing (NACE Group 36.3) and jewellery manufacturing.

Employment in furniture and other manufacturing activities declined relatively gently between 1996 and 2006, falling an average of 0.9 % per annum compared to an industrial average rate of change of -1.3 %. Nevertheless, in the two most recent years (2005 and 2006) employment fell more quickly in furniture and other manufacturing activities.

Meanwhile, the growth in output prices for furniture and other manufacturing activities was relatively modest, as the 2.1 % growth recorded in 2006 was the highest since 1996. Over these ten years the average annual increase in prices was 1.5 %, below the industrial average of 2.3 % per annum.

⁽¹⁾ Sports goods manufacturing (NACE Group 36.4), not available.

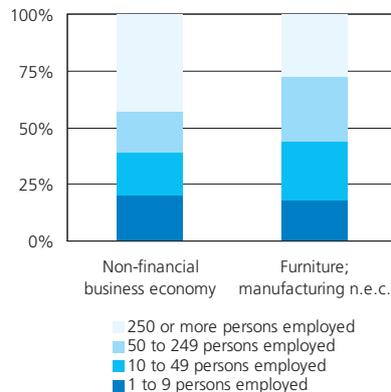
Figure 11.1

Manufacture of furniture; manufacturing n.e.c. (NACE Division 36)
Evolution of main indicators, EU-27 (2000=100)


Source: Eurostat (STS)

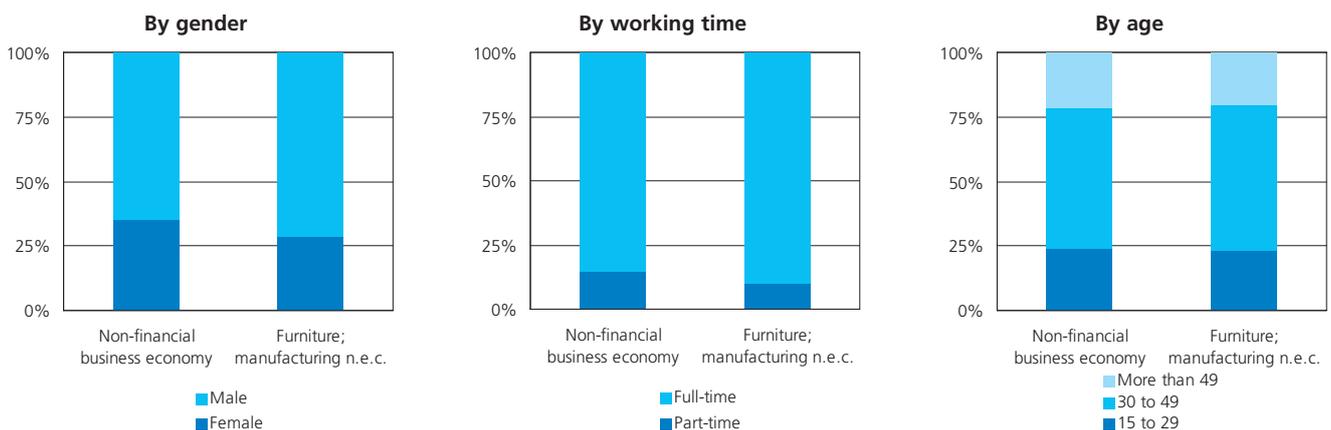
SMEs (with less than 250 persons employed) accounted for 72.5 % of the value added generated in the EU-27's furniture and other manufacturing activities in 2004, 15.6 percentage points higher than the non-financial business economy average (57.0 %). Medium-sized enterprises (with between 50 and 249 persons employed) were particularly important in this sector, as they contributed 28.0 % of value added, compared with a non-financial business economy average of 17.9 %. As noted above, the apparent labour productivity in this sector was relatively low and this was particularly pronounced among large enterprises where an average of EUR 30 500 of value added was generated per person employed in furniture and other manufacturing activities compared to a non-financial business economy average of EUR 53 400.

Figure 11.2
Manufacture of furniture; manufacturing n.e.c. (NACE Division 36)
Share of value added by enterprise size class, EU-27, 2004



Source: Eurostat (SBS)

Figure 11.3
Manufacture of furniture; manufacturing n.e.c. (NACE Division 36)
Labour force characteristics, EU-27, 2006



Source: Eurostat (LFS)

EMPLOYMENT CHARACTERISTICS

The furniture and other manufacturing activities employed a relatively low proportion of women (28.6 %) compared with the EU-27 non-financial business economy average of 35.0 % in 2006. This was particularly true in Cyprus where the share of the workforce made up of women was less than half the average for the non-financial business economy. The proportion of full-time employment in this sector was 90.1 % in the EU-27 in 2006, with most countries recording a full-time rate above 80 %. In the Netherlands the full-time rate was significantly below this, just 71.7 %, but this was still well above the Dutch non-financial business economy average (61.7 %). The age profile of the workforce in this sector was fairly close to the non-financial business economy average based on the age classes presented in Figure 11.3.

According to structural business statistics, the share of paid employees in all persons employed (including paid employees, working proprietors and unpaid family workers) in furniture and other manufacturing activities, was 88.7 % in the EU-27 in 2004, well below the industrial average (94.5 %), but comparable with the non-financial business economy average (86.2 %). In 2004 all of the Member States recorded shares in this sector below their national industrial average except for Romania which was slightly higher and Sweden where the share in this sector was 95.0 %, some 5.4 percentage points above the industrial average. Among the NACE groups that make up this sector the highest shares for the EU-27 as a whole were in the manufacture of sports goods (92.5 %), games and toys (90.8 %) and furniture (90.2 %), while the lowest shares were in the manufacture of jewellery (76.0 %) and musical instruments (80.0 %).

Table 11.3

Furniture; other manufactured goods n.e.c. (CPA Division 36)
External trade, EU-27, 2006

	Extra-EU exports		Extra-EU imports		Trade balance (EUR million)	Cover ratio (%)
	(EUR million)	(% share of industrial exports)	(EUR million)	(% share of industrial imports)		
Furniture; other manufactured goods n.e.c.	29 549	2.7	40 692	3.3	-11 143	72.6
Furniture	10 456	1.0	10 821	0.9	-364	96.6
Jewellery and related articles; musical instruments; sports goods; games and toys; miscellaneous manufactured goods n.e.c.	19 093	1.8	29 871	2.4	-10 779	63.9

Source: Eurostat (Comext)

COSTS, PRODUCTIVITY AND PROFITABILITY

The furniture and other manufacturing sector recorded relatively low tangible investment in 2004: equal to around 4.0 % of total expenditure in the EU-27. Personnel costs accounted for a large part of total expenditure, 23.5 % compared to a non-financial business economy average of 16.4 %.

Apparent labour productivity of the EU-27's furniture and other manufacturing activities was EUR 28 000 per person employed in 2004 and average personnel costs equated to EUR 22 000 per employee. Both of these ratios were well below the non-financial business economy average, in particular the apparent labour productivity. As a result the wage adjusted labour productivity ratio was also considerably below average, 127.0 % for furniture and other manufacturing activities compared with the non-financial business economy average of 148.0 %. The gross operating rate for furniture and other manufacturing activities was also below average, 9.4 % compared to 11.0 % for the non-financial business economy as a whole.

EXTERNAL TRADE

Just under two thirds (64.9 %) of furniture and other manufactured goods (CPA Division 36) exported by the EU-27 Member States was intra-EU trade and the remainder was exported outside of the EU-27. This share was slightly lower than the average for all industrial products (CPA Sections C to E). As such the EU-27 exported EUR 29.5 billion of furniture and other manufactured goods in 2006, equivalent to a 2.7 % share of industrial exports. There was a negative trade balance for furniture and other manufactured goods, as imports were valued at EUR 40.7 billion (or 3.3 % of all industrial imports). A trade deficit was recorded for furniture (CPA Group 36.1) of EUR 0.4 billion, and of EUR 10.8 billion for other manufactured goods (CPA Groups 36.2 to 36.6). At the CPA group level the only trade surplus was recorded for jewellery and related articles (CPA Group 36.2, EUR 2.0 billion), while the largest deficit (EUR 7.5 billion) was recorded for games and toys (CPA Group 36.5).

In 2006 the EU-27 recorded exports of EUR 10.5 billion for furniture and EUR 19.1 billion for other manufactured goods, of which jewellery and related goods accounted for EUR 12.3 billion.

China was the dominant partner for EU-27 imports, supplying nearly half (47.6 %) of furniture and other manufactured goods imported in 2006, far ahead of the United States (7.4 %). This share was more than three times the Chinese share of all industrial imports. At the CPA group level China dominated EU-27 imports for several products, notably furniture (42.7 %), sports goods (CPA Group 36.4, 56.8 %), miscellaneous manufactured goods (CPA Group 36.6, 63.7 %), and games and toys (83.3 %). The only CPA group where China was not the main origin of EU-27 imports was jewellery, where India (16.7 %) had the largest share, ahead of the United States, Switzerland, China and Hong Kong. The main export markets for the EU-27 for furniture and other manufactured goods were the United States, Switzerland and Russia.

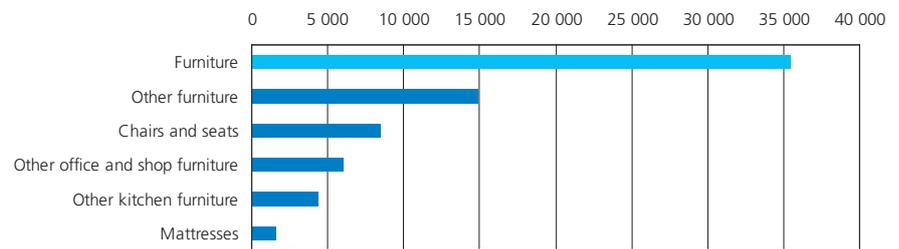
Furniture and other manufactured goods accounted for 5 % or more of industrial exports in Slovenia (6.8 %), Poland (6.5 %), Lithuania (5.4 %) and Italy (5.1 %). Italy and Poland recorded the largest trade surplus for these products, with the United Kingdom and France recording the largest trade deficits.

11.1: FURNITURE

Furniture manufacturing (NACE Group 36.1) concerns the manufacture of chairs and seats, office, shop, kitchen and other furniture, and mattresses.

The EU's furniture manufacturing activity draws on a variety of materials to manufacture its products, including wood, metal, leather, glass and synthetic materials. Increasingly the EU furniture industry has to rely on its design skills and high added value products in the face of competition from countries that are characterised by low labour costs.

Figure 11.4
Manufacture of furniture (NACE Group 36.1)
Value added, EU-27, 2004 (EUR million) (1)



(1) Rounded estimates based on non-confidential data.
Source: Eurostat (SBS)

Table 11.4

Manufacture of furniture (NACE Group 36.1)
Structural profile: ranking of top five Member States, 2004

Rank	Share of EU-27 value added (%) (1)	Share of EU-27 employment (%) (1)	Value added specialisation ratio (EU-27=100) (2)	Employment specialisation ratio (EU-27=100) (2)
1	Germany (19.3)	Italy (15.1)	Lithuania (261.5)	Estonia (268.2)
2	Italy (17.8)	Poland (12.0)	Estonia (242.2)	Lithuania (231.3)
3	United Kingdom (14.3)	Germany (11.9)	Slovenia (217.9)	Romania (230.1)
4	Spain (10.6)	Spain (10.3)	Romania (213.3)	Slovenia (206.5)
5	France (10.5)	United Kingdom (9.1)	Poland (196.7)	Poland (201.1)

(1) Greece and Malta, not available; Luxembourg, 2003.

(2) Ireland, Greece, Cyprus and Malta, not available; Luxembourg, 2003.

Source: Eurostat (SBS)

STRUCTURAL PROFILE

In 2004, furniture manufacturing (NACE Group 36.1) consisted of 144 000 enterprises which generated EUR 35.5 billion of value added in the EU-27, equivalent to 69.5 % of the total for furniture and other manufacturing activities (NACE Division 36). There were 1.4 million persons employed in the EU-27's furniture manufacturing sector, which was 72.7 % of the furniture and other manufacturing activities workforce. Just under one quarter of the sector's value added was in the manufacture of chairs and seats (NACE Class 36.11), and just under one fifth in the manufacture of other office and shop furniture (NACE Class 36.12). The manufacture of other kitchen furniture (NACE Class 36.13) (around one tenth of the sector) and the manufacture of mattresses (NACE Class 36.15) were the two smallest subsectors, while just over two fifths of the sector's value added was in the manufacture of other furniture (NACE Class 36.14).

Germany made the largest contribution to EU-27 value added in the furniture manufacturing sector in 2004 with a 19.3 % share, followed by Italy (17.8 %) and the United Kingdom (14.3 %). An analysis of employment shows a different structure, as Italy had the largest share (15.1 % of the EU-27 total) among the Member States, followed by Poland and Germany with 12.0 % and 11.9 % respectively.

The relative importance of the furniture manufacturing sector was highest in Lithuania and Estonia in 2004, as furniture accounted for 1.8 % and 1.7 % respectively of non-financial business economy (NACE Sections C to I and K) value added, and 2.6 % and 3.0 % respectively of employment.

Table 11.5
Production of selected products - furniture (CPA Group 36.1), EU-27, 2006 (1)

	Prodcom code	Production value (EUR million)	Volume of sold production (thousands)	Unit of volume
Seats for motor vehicles	36.11.11.30	11 573	54 500	units
Wooden units for fitted kitchens	36.13.10.50	10 903	108 607	units
Parts of seats including for aircraft excluding of wood, for medical, surgical, dental or veterinary seats, barbers' and similar chairs - separately presented cushions and mattresses	36.11.14.30	4 307	-	-
Upholstered seats with metal frames (excluding swivel seats, medical, surgical, dental or veterinary seats, barbers' or similar chairs, for motor vehicles, for aircraft)	36.11.11.70	1 757	33 288	units
Upholstered swivel seats with variable height adjustment, with backrest and fitted with castors or glides excluding medical, surgical, dental or veterinary seats - barbers' or similar chairs	36.11.11.55	1 562	14 289	units
Parts of furniture other than of wood or metal excluding for medical, surgical, dental or veterinary furniture, seats, barbers' chairs - for furniture designed for hi-fi, videos or televisions	36.14.15.90	1 447	-	-
Mattress supports (including wooden or metal frames fitted with springs or steel wire mesh, upholstered mattress bases, with wooden slats, divans)	36.15.11.00	1 378	22 458	units
Wooden furniture of a kind used in offices, nes, height <= 80 cm	36.12.12.50	1 162	c	units

(1) Estimated.

Source: Eurostat (PRODCOM)

Table 11.6
Manufacture of furniture (NACE Group 36.1)
Productivity and profitability, EU-27, 2004 (1)

	Apparent labour productivity (EUR thousand)	Average personnel costs (EUR thousand)	Wage adjusted labour productivity (%)	Gross operating rate (%)
Furniture	25.7	20.6	124.6	8.3
Chairs and seats	28.3	23.5	120.0	5.4
Other office and shop furniture	:	28.0	124.0	8.2
Other kitchen furniture	35.0	26.0	136.0	10.6
Other furniture	20.0	16.0	130.0	10.1
Mattresses	36.0	26.0	:	:

(1) Rounded estimate based on non-confidential data, except for furniture.

Source: Eurostat (SBS)

COSTS, PRODUCTIVITY AND PROFITABILITY

Gross tangible investment in furniture manufacturing was equivalent to just 3.5 % of total expenditure in the EU-27 in 2004, lower than the average for the other manufacturing activities in Subchapter 11.2 and below the non-financial business economy average. Romania (11.6 %) and Latvia (10.3 %) both recorded shares of tangible investment around three or more times as high as the EU-27 average, with the share recorded in Bulgaria (9.7 %) only slightly below that in these two countries.

In 2004, apparent labour productivity was EUR 25 700 per person employed in the EU-27's furniture manufacturing sector, well below the non-financial business economy average (EUR 40 900). Average personnel costs per employee were also relatively low, at EUR 20 600. Once adjusted for the share of employees in persons employed, the ratio of value added to personnel costs was 124.6 % for the EU-27's furniture manufacturing sector, 23 percentage points below the non-financial business economy average. This ratio was particularly high in Latvia (191.0 %), Poland (176.2 %) and Slovakia (165.9 %).

The gross operating rate provides information on the ratio of the gross operating surplus to turnover, and this was 8.3 % for the manufacture of furniture in 2004 in the EU-27, 2.7 percentage points below the EU-27's non-financial business economy average.

11.2: MUSICAL INSTRUMENTS, SPORTS GOODS, TOYS AND GAMES, JEWELLERY

This subchapter covers the manufacture of jewellery and related articles (NACE Group 36.2), musical instruments (NACE Group 36.3), sports goods (NACE Group 36.4), games and toys including electronic games (NACE Group 36.5) and miscellaneous manufacturing (NACE Group 36.6) which includes for example the manufacture of brushes, pens, umbrellas and candles: these are all treated in the second subchapter. Note that NACE Division 36 does not cover the manufacture of sports clothes or footwear (which are classified within NACE Divisions 18 and 19).

In 2004, the other manufacturing sector (NACE Groups 36.2 to 36.6) generated EUR 15.6 billion of value added in the EU-27 and employed approximately half a million persons. This was equivalent to 30.6 % of the furniture and other manufacturing (NACE Division 36) total value added and 26.3 % of employment.

Table 11.7

Jewellery, musical instruments, sports goods, games and toys, miscellaneous manufacturing (NACE Groups 36.2 to 36.6) Structural profile, EU-27, 2004 (1)

	No. of enterprises (thousands)	Turnover (EUR million)	Value added (EUR million)	Employment (thousands)
Jewellery and related articles; musical instruments; sports goods; games and toys; miscellaneous manufacturing n.e.c.	84.0	46 000	15 600	500.0
Jewellery and related articles	29.5	12 176	3 400	121.6
Musical instruments	5.4	1 640	700	25.0
Sports goods	4.1	5 573	1 674	42.8
Games and toys	6.5	7 000	2 300	66.8
Miscellaneous manufacturing n.e.c.	40.0	20 032	7 499	248.0

(1) Rounded estimate based on non-confidential data, except for sports goods.

Source: Eurostat (SBS)

Table 11.8

Jewellery and related articles; musical instruments; sports goods; games and toys; miscellaneous manufactured goods n.e.c. (CPA Groups 36.2 to 36.6) External trade, EU-27, 2006

	Extra-EU exports		Extra-EU imports		Trade balance (EUR million)	Cover ratio (%)
	(EUR million)	(% share of chapter)	(EUR million)	(% share of chapter)		
Other manufactured goods n.e.c.	19 093	64.6	29 871	73.4	-10 779	63.9
Jewellery and related articles	12 306	41.6	10 347	25.4	1 959	118.9
Musical instruments	465	1.6	923	2.3	-458	50.4
Sports goods	1 246	4.2	3 143	7.7	-1 897	39.7
Games and toys	1 518	5.1	9 022	22.2	-7 504	16.8
Miscellaneous manufactured goods n.e.c.	3 558	12.0	6 437	15.8	-2 879	55.3

Source: Eurostat (Comext)

JEWELLERY

The EU-27's jewellery (NACE Group 36.2) subsector consisted of 29 500 enterprises which generated EUR 3.4 billion value added in 2004 and employed 121 600 persons, in both cases between 6 % and 7 % of the furniture and other manufacturing activities sector. Italy (33.2 %) was by far the largest Member States in this subsector with 33.2 % of EU-27 value added. Despite this very large share, Italy recorded only the second highest contribution of jewellery manufacturing to the total value added for furniture and other manufacturing activities (12.3 %), behind Cyprus (19.5 %) ⁽²⁾. Investment in the jewellery subsector was just 2.8 % of total expenditure in 2004, the lowest of the NACE groups within furniture and other manufacturing activities ⁽³⁾, whereas the share of purchases of goods and services in this total was high in jewellery manufacturing, 78.8 %, reflecting the high value of many of the materials used. Low apparent labour productivity (EUR 28 000 per person employed) contributed to a low wage adjusted labour productivity ratio (120.0 %), but despite this the gross operating rate was 11.0 %, the same as the non-financial business economy average.

MUSICAL INSTRUMENTS

Musical instruments manufacturing (NACE Group 36.3) was the smallest subsector within the EU-27's furniture and other manufacturing activities sector, with 5 400 enterprises generating a value added of EUR 700 million and employing 25 000 persons, just under 1.5 % of the sectoral total by both measures. Germany dominated this small subsector, contributing 40.3 % of EU-27 value added. A combination of apparent labour productivity nearly one third (31.5 %) below the non-financial business economy average and average personnel costs just one tenth (9.4 %) below the non-financial business economy average led to the lowest wage adjusted labour productivity ratio (110.0 %) within the furniture and other manufacturing activities NACE groups. Nevertheless, the gross operating rate of 12.4 % was above the non-financial business economy average (11.0 %). Personnel costs accounted for 34.6 % of total expenditure in this subsector, more than double their average share in the non-financial business economy (16.4 %).

⁽²⁾ Bulgaria, Luxembourg, Portugal and Slovenia, 2003; Denmark, Ireland, Greece and Malta, not available.

⁽³⁾ Games and toys manufacturing, not available.

SPORTS GOODS

Sports goods manufacturing (NACE Group 36.4) in the EU-27 consisted of 4 100 enterprises which recorded a value added of EUR 1.7 billion in 2004 and employed 42 800 persons, making it the second smallest subsector in the furniture and other manufacturing activities sector. France (24.5 % of EU-27 total value added), Austria (15.9 %), Italy (15.8 %) and the United Kingdom (14.4 %) had the largest sports goods manufacturing subsectors in terms of value added, and as a result Austria recorded by far the highest value added specialisation ratio for this subsector ⁽⁴⁾.

This sector is most notable for having the highest apparent labour productivity (EUR 39 100 per person employed) and average personnel costs (EUR 27 100 per employee) among the furniture and other manufacturing activities NACE groups, although these were still slightly below the non-financial business economy average, as were the wage adjusted labour productivity ratio (144.2 %) and the gross operating rate (10.8 %).

GAMES AND TOYS

The EU-27's toys and games manufacturing (NACE Group 36.5) subsector consisted of 6 500 enterprises which employed 66 800 persons in 2004 and generated EUR 2.3 billion of value added. Germany and the United Kingdom had the largest shares of EU-27 value added in this subsector, 27.8 % and 18.4 % respectively. The Czech Republic, Slovenia and Austria were relatively specialised in this activity, as it contributed about three times as much to national non-financial business economy value added in these Member States as it did for the EU-27 as a whole ⁽⁵⁾. Note that no recent data are available for either Denmark or Malta, both of whom are relatively highly specialised in games and toys manufacturing.

The wage adjusted labour productivity ratio in the EU-27's toys and games manufacturing subsector was 149.0 %, and as such was the only NACE group within the furniture and other manufacturing activities where this ratio exceeded the non-financial business economy average (148.0 %). The gross operating rate was also above the non-financial business economy average, at 13.0 %.

⁽⁴⁾ Estonia and Slovenia, 2003; Ireland, Greece, Luxembourg and Malta, not available.

⁽⁵⁾ Denmark, Estonia, Ireland, Greece, Luxembourg and Malta, not available.

MISCELLANEOUS MANUFACTURING

The activity of miscellaneous manufacturing (NACE Group 36.6) was the largest of the five NACE groups covered within this subchapter as it generated 14.7 % of value added within the whole of furniture and other manufacturing activities in 2004 and employed 13.1 % of the workforce, making it approximately twice the size of jewellery manufacturing: the 40 000 enterprises generated a value added of EUR 7.5 billion with a workforce of around a quarter of a million. For miscellaneous manufacturing the United Kingdom was the largest Member State in 2004, with 26.3 % of EU-27 value added, ahead of Germany with 18.0 %. In terms of value added Sweden was the most specialised Member State ⁽⁶⁾, as this activity contributed more than three times as much (0.5 %) to non-financial business economy value added in Sweden as it did in the EU-27 as a whole. The miscellaneous manufacturing activity distinguished itself by recording the highest share (4.5 %) of tangible investment within total expenditure of all of the NACE groups within the furniture and other manufacturing activities, although this was still slightly below the non-financial business economy average. This subsector also recorded the highest gross operating rate within furniture and other manufacturing activities, 13.3 % compared to a non-financial business economy average of 11.0 %.

⁽⁶⁾ Portugal, 2003; Ireland, Greece, Cyprus, Luxembourg and Malta, not available.

Table 11.9

Manufacture of furniture; manufacturing n.e.c. (NACE Division 36)

Main indicators, 2004

	EU-27 (1)	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	IT	CY	LV	LT
No. of enterprises (thousands)	227.5	3.7	2.1	12.4	1.8	13.5	0.5	:	:	25.9	29.0	48.6	0.9	0.8	0.8
Turnover (EUR million)	164 000	4 246	:	2 512	:	28 760	375	:	:	14 728	20 384	36 720	158	211	457
Production (EUR million)	157 000	4 053	:	2 448	:	27 470	355	:	:	14 469	18 594	36 050	138	206	438
Value added (EUR million) (2)	51 000	1 050	63	757	:	9 706	100	:	:	4 795	5 788	9 165	64	82	140
Gross operating surplus (EUR million)	15 500	317	:	325	:	2 206	22	:	:	1 382	1 129	3 365	20	39	45
Purchases of goods & services (EUR million)	110 000	3 185	:	1 832	:	18 968	281	:	:	10 265	14 445	27 811	99	143	325
Personnel costs (EUR million)	35 600	733	:	435	:	7 500	78	:	:	3 413	4 659	5 800	45	43	95
Investment in tangible goods (EUR million)	6 000	263	:	94	:	681	24	:	:	655	580	1 212	8	22	33
Employment (thousands)	1 900	26	:	75	:	232	13	:	:	176	153	298	3	14	23
Apparent labour prod. (EUR thousand)	28.0	41.0	:	10.1	:	41.8	7.7	:	:	27.2	37.8	30.7	20.4	6.0	6.1
Average personnel costs (EUR thousand)	22.0	33.6	:	7.1	:	34.3	6.1	:	:	21.5	33.2	25.5	16.7	3.2	4.2
Wage adjusted labour productivity (%)	127.0	121.9	:	143.0	:	122.0	126.3	:	:	126.2	113.9	120.5	122.4	185.5	144.8
Gross operating rate (%)	9.4	7.5	:	12.9	:	7.7	5.9	:	:	9.4	5.5	9.2	12.3	18.4	9.8
Investment / employment (EUR thousand)	3.0	10.3	:	1.3	:	2.9	1.8	:	:	3.7	3.8	4.1	2.7	1.6	1.4
	LU (3)	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	NO	
No. of enterprises (thousands)	0.1	6.6	:	7.5	4.8	24.3	9.5	4.5	1.8	0.3	2.6	5.8	17.6	1.8	
Turnover (EUR million)	25	890	:	4 422	4 709	6 453	2 733	1 278	784	800	1 754	4 230	21 739	1 546	
Production (EUR million)	26	719	:	4 154	4 414	6 051	2 604	1 260	718	780	1 576	4 582	20 292	1 462	
Value added (EUR million)	12	222	:	1 412	1 739	1 709	830	359	253	144	600	1 692	8 252	574	
Gross operating surplus (EUR million)	3	56	:	382	473	860	222	135	68	55	172	238	3 243	165	
Purchases of goods & services (EUR million)	16	676	:	3 008	3 064	4 803	1 968	1 065	536	657	1 174	3 052	13 386	1 015	
Personnel costs (EUR million)	8	166	:	1 031	1 266	848	608	225	185	90	428	1 455	5 009	409	
Investment in tangible goods (EUR million) (4)	0	52	:	210	165	329	142	170	34	25	51	136	638	50	
Employment (thousands) (4)	0	34	:	37	46	212	65	115	16	15	14	48	193	11	
Apparent labour prod. (EUR thousand) (4)	37.0	6.5	:	38.2	38.0	8.1	12.8	3.1	15.5	9.6	41.9	35.5	42.8	51.1	
Average personnel costs (EUR thousand) (4)	31.2	5.5	:	35.3	30.6	4.7	10.0	2.0	12.3	6.0	31.8	32.1	28.5	39.5	
Wage adjusted labour productivity (%) (4)	118.6	117.9	:	108.1	124.0	171.6	127.7	158.6	126.1	160.4	131.7	110.5	150.3	129.4	
Gross operating rate (%)	13.2	6.3	:	8.6	10.0	13.3	8.1	10.5	8.7	6.8	9.8	5.6	14.9	10.7	
Investment / employment (EUR thousand) (4)	1.3	1.5	:	5.7	3.6	1.5	2.2	1.5	2.2	1.6	3.6	2.9	3.3	4.4	

(1) Rounded estimates based on non-confidential data.

(2) Bulgaria, 2003.

(3) 2003.

(4) Slovenia, 2003.

Source: Eurostat (SBS)