

Textiles, clothing, leather and footwear

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This chapter covers the manufacture of textiles, clothing, fur and leather goods, as defined by NACE Subsections DB and DC, hereafter referred to as textiles, clothing and leather manufacturing. The manufacture of textiles (NACE Division 17) is dealt with in the first subchapter, while the manufacture of wearing apparel and the dressing and dyeing of fur (NACE Division 18), hereafter called the manufacture of clothing, is the subject of the second subchapter. The final subchapter concentrates on the manufacture of leather and leather products including that of footwear (as covered by NACE Subsection DC), hereafter referred to as leather manufacturing.

Since the closure of the World Trade Organisation's (WTO) ten-year, transitional Agreement on Textiles and Clothing (ATC) at the end of 2004,

the European Union market for textiles, clothing, leather and footwear has been open to far more global competition, particularly from China and other Far Eastern countries. The European Commission published a study on the competitiveness, economic situation and location of production in the textiles and clothing, footwear, leather [and furniture] industries in 2007⁽¹⁾, which put forward some ideas for consideration: to upgrade knowledge and skills within the sector; to enhance the value added of EU manufactured products, perhaps through emphasising social ethics, environmental and health considerations and ethical sourcing; to enhance the protection of intellectual property; to foster trade and eliminate trade barriers; to improve the integration of fashion and design in the sector and better support young designers.

(1) For more information, see <http://ec.europa.eu/enterprise/textile>.

Table 4.1: Manufacture of textiles and textile products; manufacture of leather and leather products (NACE Subsections DB and DC)
Structural profile, EU-27, 2006 (1)

	Enterprises		Turnover		Value added		Persons employed	
	(% of thousand)	(% of total)	(EUR million)	(% of total)	(EUR million)	(% of total)	(% of thousand)	(% of total)
Textiles, clothing & leather products	267.0	100.0	235 345	100.0	64 749	100.0	2 997.5	100.0
Textiles	79.1	29.6	105 000	44.6	30 000	46.3	1 060.0	35.4
Wearing apparel; dressing & dyeing of fur	143.9	53.9	82 600	35.1	22 500	34.7	1 390.0	46.4
Tanning & dressing of leather; luggage, handbags, saddlery, harness & footwear	44.0	16.5	47 235	20.1	11 929	18.4	548.8	18.3

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

Source: Eurostat (SBS)

Table 4.2: Manufacture of textiles and textile products; manufacture of leather and leather products (NACE Subsections DB and DC)
Structural profile: ranking of top five Member States, 2006

	Highest value added (1)			Largest number of persons employed (2)			Most specialised: share in the non-financial business economy (%)	
	Country	(EUR million)	(% of EU-27)	Country	(thousand)	(% of EU-27)	Value added (3)	Persons employed (4)
1	Italy	21 766	33.6	Italy	636.0	21.2	Romania (5.3)	Romania (11.6)
2	Germany	7 806	12.1	Romania	425.1	14.2	Bulgaria (4.7)	Bulgaria (10.9)
3	France	7 483	11.6	Poland	278.1	8.8	Italy (3.4)	Lithuania (5.6)
4	Spain	5 937	9.2	Spain	223.7	7.5	Lithuania (2.9)	Estonia (5.1)
5	United Kingdom	5 067	7.8	Bulgaria	195.7	6.5	Slovenia (2.7)	Slovenia (4.9)

(1) Denmark, Latvia, Malta, Portugal and Slovakia, not available; Bulgaria, the Netherlands, Austria, Poland and Slovenia, 2005.

(2) Denmark, Malta, Portugal and Slovakia, not available; the Netherlands, Austria, Poland and Slovenia, 2005.

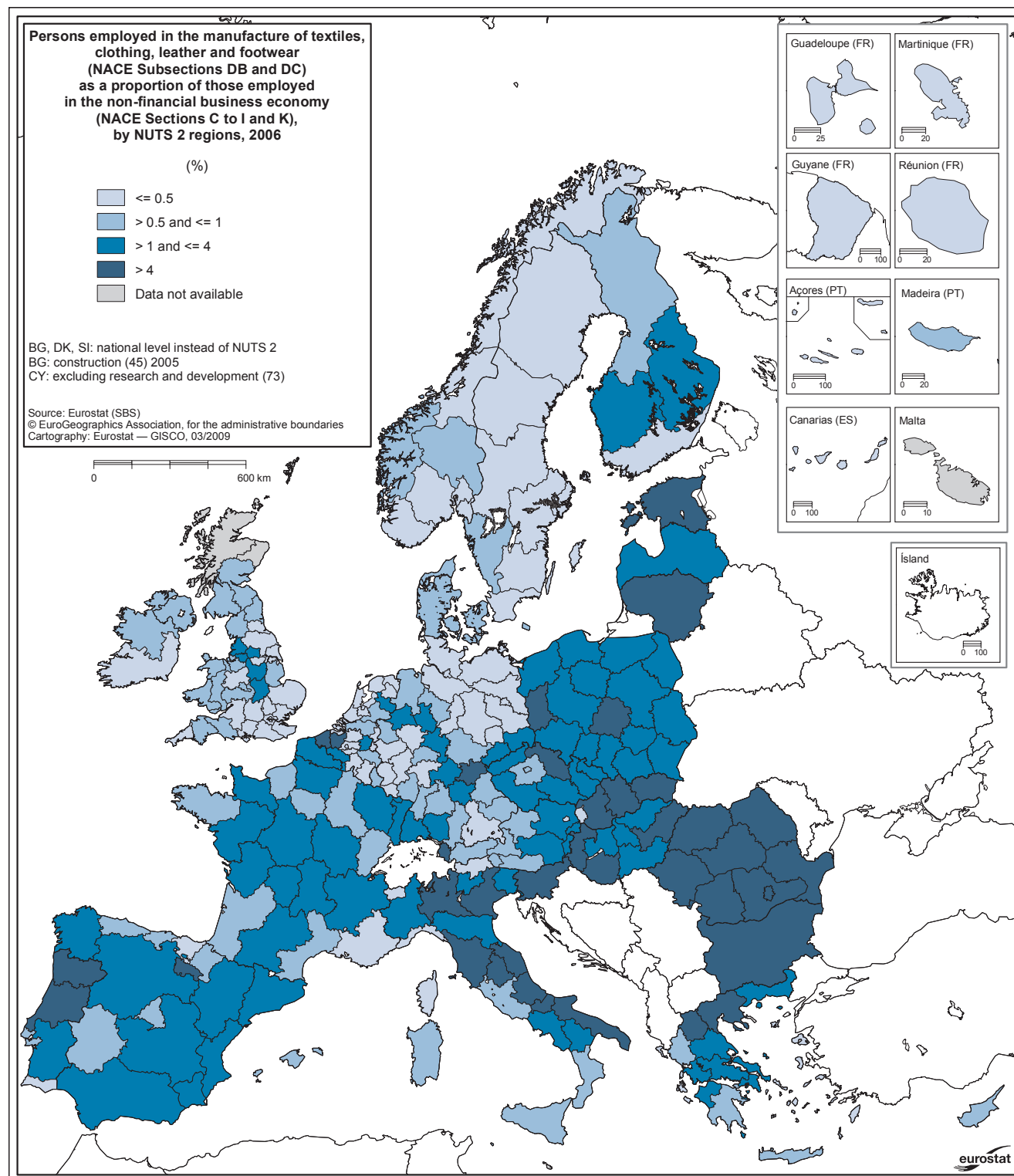
(3) Denmark, Latvia, Malta, the Netherlands, Portugal and Slovakia, not available; Bulgaria, Cyprus, Austria, Poland, Romania and Slovenia, 2005.

(4) Denmark, Malta, Portugal and Slovakia, not available; Bulgaria, Cyprus, the Netherlands, Austria, Poland, Romania and Slovenia, 2005.

Source: Eurostat (SBS)

Map 4.1: : Manufacture of textiles and textile products; manufacture of leather and leather products (NACE Subsections DB and DC)

Persons employed in the manufacture of textiles, clothing, leather and footwear (NACE Subsections DB and DC) as a proportion of those employed in the non-financial business economy (NACE Sections C to I and K) (%)



Source: Eurostat (SBS)

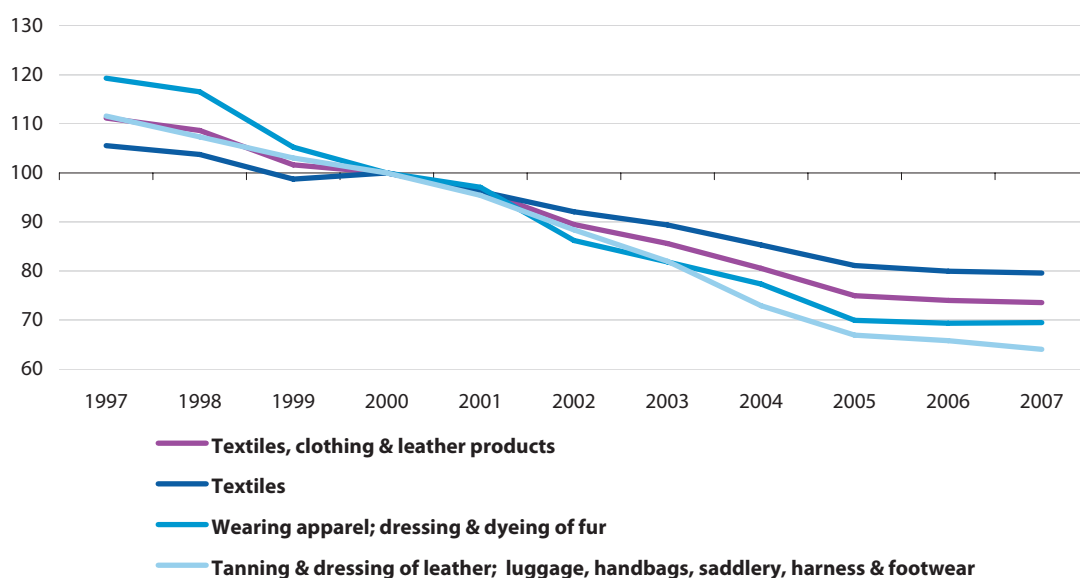
Structural profile

There were just over 267.0 thousand enterprises in the Member States for which the manufacture of textiles, clothing and leather (NACE Subsections DB and DC) was their main activity in 2006. In relative terms, this sector of the economy was larger in terms of employment than in terms of its value added generated; about 3.0 million people were employed in the sector, corresponding to 2.3 % of the EU-27's non-financial business economy (NACE Sections C to I and K) workforce, whereas the EUR 64.7 billion of value added corresponded to 1.1 % of the total value added generated across the non-financial business economy in 2006.

The largest activity within the sector (at NACE Division level) was the manufacture of textiles (NACE Division 17), which accounted for a little under one half (46.3 %) of sectoral value added in 2006. Just over one third (34.7 %) of value added was generated by the EU-27's manufacture of clothing (as defined by the activities in NACE Division 18), with the remainder (18.4 %) being generated by leather manufacturing (NACE Division 19).

Italy was the principal textiles, clothing and leather manufacturing Member State, generating EUR 21.8 billion of value added, which was the equivalent of one third (33.6 %) of EU-27 value added in this sector in 2006. The other main textiles, clothing

Figure 4.1: Manufacture of textiles and textile products; manufacture of leather and leather products (NACE Subsections DB and DC)
Index of production, EU-27 (2000=100)



Source: Eurostat (STS)

Table 4.3: Manufacture of textiles and textile products; manufacture of leather and leather products (NACE Subsections DB and DC)
Share of value added and persons employed by enterprise size class, EU-27, 2006 (%)

	Value added		Persons employed	
	Non-financial business economy (1)	Textiles, clothing & leather products	Non-financial business economy	Textiles, clothing & leather products
1 to 9 persons employed	21.0	14.1	29.7	17.7
10 to 49 persons employed	18.9	28.0	20.7	26.3
50 to 249 persons employed	17.8	32.4	17.0	31.2
250 or more persons employed	42.1	25.5	32.6	24.7

(1) 1 to 9 persons employed and 50 to 249 persons employed, 2005.

Source: Eurostat (SBS)

and leather manufacturing Member States within the EU-27 were Germany (accounting for 12.1 % of the EU-27's value added), France (11.6 %), Spain (9.2 %) and the United Kingdom (7.8 %). Of these five Member States, only Italy was specialised in the manufacture of textiles, clothing and leather; as this sector contributed 3.4 % of the value added generated in its non-financial business economy, three times the average contribution recorded across the EU-27 in 2006. However, this measure of specialisation was even stronger in Romania and Bulgaria. In Romania, the textiles, clothing and leather manufacturing sector contributed 5.3 % to the value added generated across its non-financial business economy in 2005; in Bulgaria this proportion was 4.7 %.

This relative specialisation was also clear in terms of employment. There were a number of regions in Romania where between 8 % and 15 % of the non-financial business economy workforce were employed in the textiles, clothing and leather manufacturing sector. The most specialised region (at the level of detail shown in the map) was Norte in Portugal, however, where about one in every five (18.3 %) persons employed in the non-financial business economy worked in textiles, clothing and leather manufacturing. There was also high specialisation of textiles, clothing and leather manufacturing in many regions of Italy, as well as across Slovenia, Estonia, Lithuania and Bulgaria (which are each considered as a single region at the level of detail in the map).

There was a strong downward trend in the index of production for textiles, clothing and leather manufacturing for the EU-27 during the period between 1997 and 2007, at a time when there was a relatively steady rise in total industrial output. Textiles, clothing and leather manufacturing output declined by one third in the ten years through to 2007, at an average rate of 4.0 % per annum, although the falls in 2006 (-1.3 %) and 2007 (-0.6 %) were much more moderate than this longer-term trend. This output pattern was also reflected in the production indices of each of the three main types of manufacturing. However, the declines noted for leather manufacturing (an average -5.4 % per annum over the ten years through until 2007) and clothing (an average -5.3 % per annum) were almost twice as strong as for textile manufacturing (an average -2.8 % per annum).

Small and medium-sized enterprises (SMEs, enterprises employing less than 250 people) dominated the textiles, clothing and leather manufacturing sector in the EU-27, accounting for around three quarters of sectoral value added (74.5 %) and employment (75.3 %) in 2006. This size structure set the sector apart from most industrial activities in the EU-27, as across the EU-27's industrial economy (NACE Sections C to E) as a whole SMEs generated less than half (42.5 %) of total value added. The share of value added generated by SMEs in the textiles, clothing and leather manufacturing sector was also significantly higher than the average (57.9 %) across the non-financial business economy.

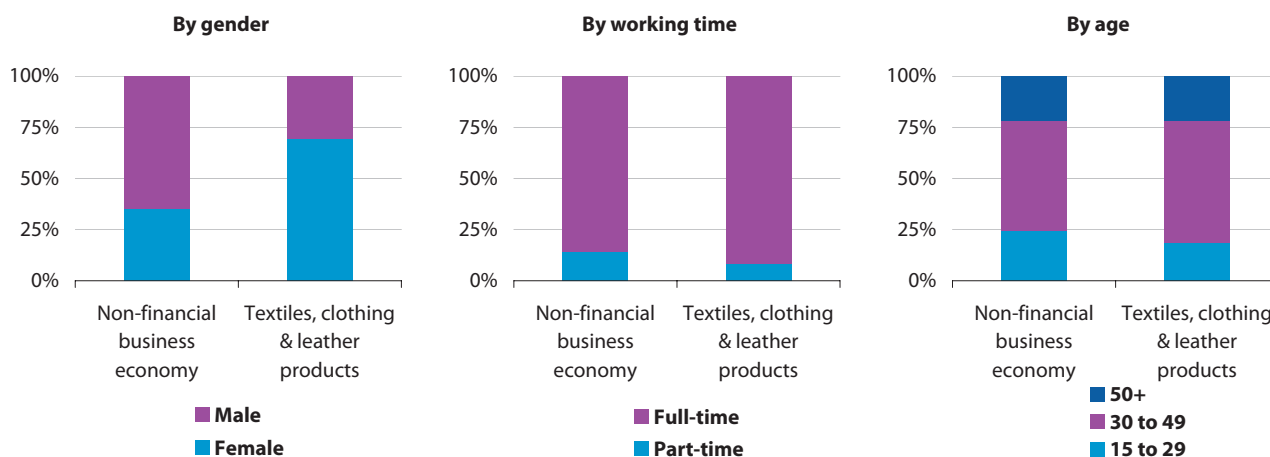
Across industry and the non-financial business economy, the apparent productivity of labour tended to rise through the size classes, suggesting economies of scale. In contrast, there was almost no distinction between the apparent labour productivity levels of the size classes within the textiles, clothing and leather manufacturing sector. Indeed, across all size classes within the sector, the apparent labour productivity level was low (between EUR 17.0 thousand and EUR 23.0 thousand per person employed) and about one half of the average across the EU-27's non-financial business economy (EUR 44.0 thousand per person employed).

Employment characteristics

The textiles and clothing manufacturing subsector and the leather manufacturing subsector were the only industrial subsections that employed more women than men across the EU-27 in 2007. Indeed, women accounted for a little more than two thirds (69.4 %) of the textiles, clothing and leather manufacturing workforce as a whole, which was about twice the average share (35.1 %) across the EU-27's non financial business economy and even more than the industrial average (30.1 %). With the exception of Belgium and the Netherlands among the Member States for which data are available⁽²⁾, women provided a majority of the workforce within the sector. In the Baltic Member States, Bulgaria, Hungary and Romania, women represented between eight and nine in every ten workers in the textiles, clothing and leather manufacturing sector.

(2) Luxembourg and Malta, not available.

Figure 4.2: Manufacture of textiles and textile products; manufacture of leather and leather products (NACE Subsections DB and DC)
Employment characteristics, 2007



Source: Eurostat (LFS)

Given the high proportion of women employed in the textiles, clothing and leather manufacturing sector of the EU-27, it is perhaps surprising that the proportion of workers engaged on a part-time basis was as low as 8.2 % in 2007, as it is often a characteristic that activities with a high proportion of women in the workforce are associated with high part-time employment rates. Indeed, part-time workers in the textiles, clothing and leather manufacturing sector were much less common than across the non-financial business economy, where they represented 14.3 % of the workforce.

Another key feature of the workforce was that the proportion of those aged under 30 in the EU-27's textiles, clothing and leather manufacturing sector (18.4 %) was much lower than the average across the non-financial business economy (24.3 %) in 2007. The relative difference between the two was made up for in workers aged between 30 and 49 years of age, the proportions of those workers aged 50 years or over being almost identical. The relative absence of young workers in the textiles, clothing and leather manufacturing sector was most acute in Greece, Latvia and the Netherlands, where they represented about a third of the equivalent share of workers aged under 30 across their respective non-financial business economies. Other countries where this characteristic was particularly pronounced included

Slovenia, Estonia, Poland and Austria. Indeed, among those Member States for whom data are available⁽³⁾, it was only in Romania that the share of young workers in this sector was higher than that across its non-financial business economy in 2007. In contrast, the proportion of workers in the textiles, clothing and leather manufacturing sector aged 50 or over was particularly high in Cyprus (63.6 %), especially when compared against the average (25.2 %) across the whole of its non-financial business economy.

Expenditure, productivity and profitability

The level of tangible investment in the textiles, clothing and leather manufacturing sector was EUR 7.3 billion in 2006, accounting for just 0.7 % of investment across the EU-27's non-financial business economy. This relative level of investment was lower than the sector's relative contribution (1.1 %) to value added within the non-financial business economy in 2006, a characteristic that was common across the Member States but particularly notable in some of the key textile, clothing and leather manufacturing Member States like Italy, Bulgaria and Romania. The investment rate across the EU-27's textiles, clothing and leather manufacturing sector was 11.3 % in 2006, considerably lower than the average rate for the non-financial business economy

(3) Denmark, Ireland, Cyprus, Luxembourg, Malta and Finland, not available.

Table 4.4: Manufacture of textiles and textile products; manufacture of leather and leather products (NACE Subsections DB and DC)

Expenditure, productivity and profitability, EU-27, 2006 (1)

	(EUR million)			(EUR thousand per person)		(%)	
	Personnel costs	Purchases of goods & services	Investment in tangible goods	Apparent labour productivity	Average personnel costs	Wage adjusted labour productivity	Gross operating rate
Textiles, clothing & leather products	44 441	172 539	7 344	21.6	16.2	133.6	8.6
Textiles (2)	21 300	76 000	4 500	28.3	21.5	131.5	8.6
Wearing apparel; dressing & dyeing of fur	15 100	60 900	1 781	16.2	12.0	135.1	8.9
Tanning & dressing of leather; luggage, handbags, saddlery, harness & footwear	7 990	35 869	1 059	21.7	16.0	136.2	8.3

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

(2) Purchases of goods and services, 2005.

Source: Eurostat (SBS)

(18.4 %). Investment rates for the clothing and leather subsectors were particularly low (7.9 % and 8.9 % respectively).

The average annual cost of personnel within the EU-27's textile, clothing and leather manufacturing sector was EUR 16.2 thousand per employee in 2006, by far the lowest figure among the chapter aggregates for industry as shown in Chapters 2 to 15, and a little more than two fifths (43.9 %) less than the average across the non-financial business economy. This characteristic was apparent in all of the Member States for which data are available⁽⁴⁾, with the exception of Luxembourg where average personnel costs in this sector were above their respective national averages for the non-financial business economy.

Despite relatively low average personnel costs, the proportion of operating expenditure accounted for by personnel costs (20.5 %) was notably higher than the share across the EU-27's non-financial business economy (16.1 %). These figures support the notion of a low-wage, labour-intensive manufacturing sector.

The apparent labour productivity of those working in the EU-27's textiles, clothing and leather manufacturing sector was EUR 21.6 thousand per person employed in 2006. This was almost exactly one half of the average productivity level of all

those working across the non-financial business economy, and compared with the sectoral aggregates used in Chapters 2 to 25 of this publication it was only higher than the apparent labour productivity recorded for accommodation and food services. This low productivity was all the more notable given the small proportion of part-time employment within the sector. Even after adjusting productivity levels for low average personnel costs, the resulting wage adjusted productivity ratio for the EU-27's textiles, clothing and leather manufacturing sector (133.6 %) remained well beneath that (151.1 %) of the non-financial business economy in 2006. The wage adjusted labour productivity ratios for each of the three subsectors (separately textiles, clothing and leather manufacturing) were very similar, with the value added per person employed being between 31 % and 37 % higher than the respective average personnel costs per employee.

Among the Member States, the wage adjusted labour productivity ratio of the textiles, clothing and leather manufacturing sector was significantly below the national non-financial business economy average⁽⁴⁾, with the exceptions of Luxembourg (where it was about two thirds higher than the non-financial business economy average) and Italy (where it was almost the same).

⁽⁴⁾ Bulgaria, Cyprus, Austria, Poland, Romania and Slovenia, 2005; Denmark, Ireland, Latvia, Malta, the Netherlands, Portugal and Slovakia, not available.

The gross operating rate of the EU-27's textiles, clothing and leather manufacturing sector was 8.6 % in 2006, with very similar rates for its three subsectors. As such, this measure of profitability was notably lower than that for the non-financial business economy (10.8 %) as a whole. There were a few Member States, however, where the gross operating rate for the textiles, clothing and leather manufacturing sector was higher than the average for the non-financial business economy; these were Bulgaria (2005), Hungary, Finland, and particularly Luxembourg (where it was more than double the average).

External trade

Almost three quarters (72.0 %) of the value of Member States' export trade in textiles, clothing and leather goods (CPA Subsections DB and DC) was within the European Union (so-called intra-EU trade). The remaining share was exports to non-member countries (so-called extra-EU trade) and was valued at EUR 48.2 billion in 2007. Although this represented a fourth successive year of extra-EU export growth, this level was dwarfed by the value of EU-27 imports. In the first three years after the ending of the Agreement on Textiles and Clothing and its textile quotas on 31 December 2004, the value of EU-27 imports of textiles, clothing and leather goods had grown by 27.4 % to EUR 102.6 billion, representing 7.7 % of the value of all industrial imports in 2007. These developments resulted in a further widening of

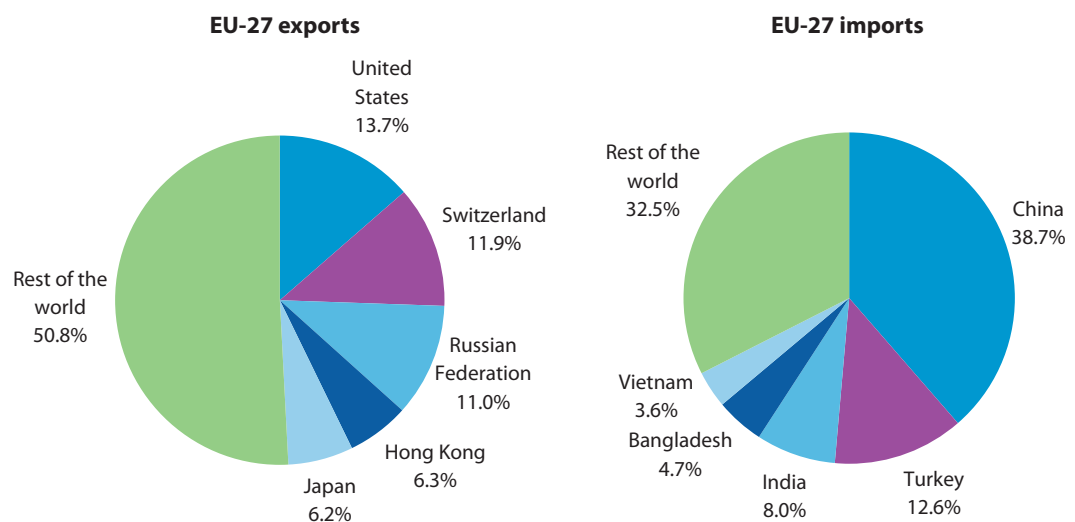
the trade deficit in textiles, clothing and leather goods from the EUR 38.7 billion recorded in 2004 to the EUR 54.5 billion recorded in 2007.

Exports of textiles, clothing and leather goods from the EU-27 accounted for 4.1 % of all industrial exports. There was strong export specialisation in textiles, clothing and leather goods in Italy, Portugal, Bulgaria and, particularly, Romania (where they accounted for 18.8 % of industrial exports). Each of these Member States, as well as Belgium and Lithuania, recorded a trade surplus in these goods in 2007. By far the largest of these trade surpluses was recorded for Italy (EUR 16.7 billion), although this has been steadily eroded over a number of years: by way of example, down from EUR 23.1 billion in 2001. In contrast, the United Kingdom had a trade deficit that widened to EUR 19.5 billion in 2007, by far the largest deficit in these goods among the Member States.

With the removal of quotas, there was a surge of imports from developing countries during 2005, particularly from China. Just under two fifths (38.7 %) of the EU-27's imports of textiles, clothing and leather goods as a whole came from China in 2007. In more detail, the transitional quantitative limitations on textile and clothing products imports agreed separately between the EU and China limited the growth of imports from China in 2006 and 2007. Nevertheless, the value of textile and clothing imports (CPA Subsection DB) grew by a further 13.0 % in 2007 to

Figure 4.3: Textiles and textile products; leather and leather products (CPA Subsections DB and DC)

Main trading partners, EU-27, 2007 (% share of exports/imports in value terms)



Source: Eurostat (Comext)

EUR 29.2 billion, representing more than a third (36.2 %) of all EU-27 textile and clothing imports. Imports from Turkey also grew relatively strongly (up 6.5 %) to EUR 12.7 billion, the equivalent of 15.8 % of EU-27 imports.

In 2006, two Anti-Dumping investigations were launched by the European Commission regarding footwear, one concerning China and the other Vietnam. The punitive duties that resulted have

not stopped the growth in imports from China, their value rising by 7.7 % to EUR 10.6 billion in 2007, although there was considerably lower growth (up 0.7 %) from Vietnam. As a result of these latest developments, China inched closer to being the origin of one half (47.9 %) of all the EU-27's imports of leather and leather products in 2007, Vietnam's share falling slightly to about one tenth (10.6 %).

4.1: Textiles

This subchapter deals with the manufacture of textiles and includes processes such as spinning, weaving and the finishing of products, as classified within NACE Division 17.

The European Commission has decided to revise the legislation on textiles names and the related labelling of textile products, with the aim of simplifying and improving the existing regulatory framework for the development and uptake of novel fibres. It put forward a proposal⁽⁵⁾ in January 2009, with the hope that innovation in the textile and clothing sector would be encouraged and that fibre users and consumers would benefit more immediately from innovative products.

Similarly, the European Parliament and the Council issued a Directive⁽⁶⁾ on textile names, requiring the labelling of the fibre composition of

textile products. Furthermore, it stipulates that checks be carried out to ensure that the composition of textile products is in conformity with the information supplied. It is hoped that these updated rules will strengthen the provision of coherent fibre composition and the labelling of products, thereby giving consumers greater confidence in the quality of their purchases.

Structural profile

There were 79.1 thousand enterprises across the EU-27 for which the manufacture of textiles (NACE Division 17) was their main activity in 2006. These enterprises employed just over one million people, a little over one third (35.4 %) of the textiles, clothing and leather manufacturing workforce. They generated an estimated EUR 30.0 billion of value added in 2006, closer to one half (46.3 %) of the added value generated across textiles, clothing and leather manufacturing.

(5) COM(2009) 31 final.

(6) Directive 2008/121/EC.

Table 4.5: Manufacture of textiles (NACE Division 17)
Structural profile, EU-27, 2006 (1)

	Enterprises (thousand)	Turnover (EUR million)	Value added (EUR million)	Persons employed (thousand)	Share in total (%)	
					Value added	Persons employed
Textiles	79.1	105 000	30 000	1 060.0	100.0	100.0
Preparation & spinning of textile fibres	5.4	13 032	3 127	113.5	10.4	10.7
Textile weaving	6.4	20 194	5 427	183.8	18.1	17.3
Finishing of textiles	8.1	9 753	3 482	110.0	11.6	10.4
Made-up textile articles, except apparel	24.7	17 000	:	220.0	:	20.8
Other textiles (2)	17.0	30 000	8 000	220.0	25.8	20.8
Knitted & crocheted fabrics	4.8	4 807	1 200	42.0	4.0	4.0
Knitted & crocheted articles (3)	12.3	10 557	3 218	186.0	10.7	16.3

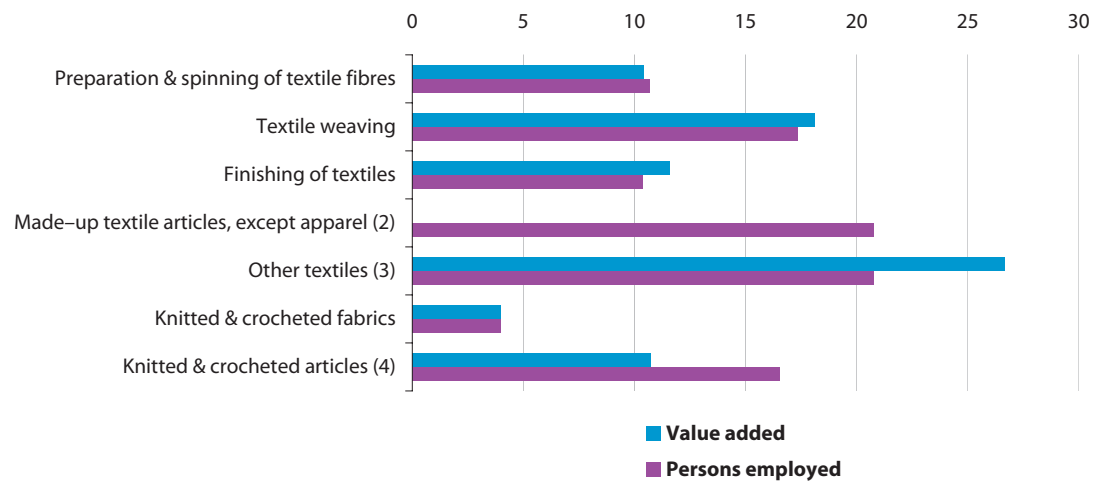
(1) Rounded estimates based on non-confidential data.

(2) Value added, 2005.

(3) Number of persons employed, 2005.

Source: Eurostat (SBS)

Figure 4.4: Manufacture of textiles (NACE Division 17)
Relative weight within textiles, EU-27, 2006 (%) (1)



- (1) Rounded estimates based on non-confidential data.
 (2) Value added, not available.
 (3) Value added, 2005.
 (4) Number of persons employed, 2005.

Source: Eurostat (SBS)

The largest activity within the textiles sector was the manufacture of other textiles (NACE Group 17.5) such as carpets, rugs and non-woven articles; this subsector generated an estimated EUR 8.0 billion of value added across the EU-27 in 2005. The activity of textile weaving (NACE Group 17.2) generated EUR 5.4 billion of value added, making it the next largest. By far the smallest activity was the manufacture of knitted and crocheted fabrics (NACE Group 17.6), which generated EUR 1.2 billion of value added.

The principal textile manufacturing Member State was Italy, with EUR 8.7 billion of value added generated in 2006 accounting for around 28.9 % of EU-27 value added. The textiles manufacturing sectors in Germany, the United Kingdom and France were the next largest, together contributing just over a third (36.0 %) of the EU-27's value added. All three countries were relatively unspecialised in textile manufacturing, however, as the relative contribution of this sector to national non-financial business economy value added was beneath the EU-27 average. In contrast, Portugal, Bulgaria (2005) and Italy were relatively specialised in the manufacture of textiles, as this sector contributed about 1.5 % of the total value added in their respective non-financial business economies in 2006, between two and a half and three times the EU-27 average.

The production index of the EU-27's textiles manufacturing activity declined by an average 2.8 % per annum in the ten years through until 2007, despite a temporary upturn in 2000 and a marked slowdown in the rate at which output fell in 2006 and 2007. This pattern of development was common to six of the seven textile manufacturing NACE groups, with the sharpest rate of decline (an average -5.6 % per annum) being recorded for the preparation and spinning of textile fibres (NACE Group 17.1). The exception was the manufacture of other textiles (NACE Group 17.5) such as carpets, rugs and non-woven articles, for which the production level in 2007 was remarkably similar to that in 1997 and was relatively stable in the period in-between.

Expenditure and productivity

A little over three fifths (61.3 %) of the tangible investment within the textiles, clothing and leather manufacturing sector was for textiles manufacturing in 2006. The investment rate, defined as the ratio of tangible investment to value added, was 15.0 % for textiles manufacturing, which was considerably higher than the rates for clothing or leather manufacturing.

The structure of operating expenditure for the EU-27's textiles manufacturing sector was broadly similar to that of textiles, clothing and leather

Table 4.6: Manufacture of textiles (NACE Division 17)
Expenditure, productivity and profitability, EU-27, 2006 (1)

	(EUR million)			(EUR thousand per person)	
	Personnel costs	Purchases of goods & services	Investment in tangible goods	Apparent labour productivity	Average personnel costs
Textiles (2)	21 300	76 000	4 500	28.3	21.5
Preparation & spinning of textile fibres	2 299	10 085	818	27.5	21.4
Textile weaving	4 040	14 815	1 069	29.5	22.8
Finishing of textiles	2 651	6 239	423	31.7	26.5
Made-up textile articles, except apparel (3)	3 600	12 000	480	24.0	18.5
Other textiles (4)	5 700	21 000	1 100	36.0	27.1
Knitted & crocheted fabrics	838	3 620	175	28.6	23.3
Knitted & crocheted articles (3)	2 187	7 475	400	17.7	14.0

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

(2) Purchases of goods and services, 2005.

(3) Apparent labour productivity, 2005.

(4) Investment in tangible goods and apparent labour productivity, 2005.

Source: Eurostat (SBS)

Table 4.7: Textiles (CPA Division 17)
Production of selected products, EU-27, 2007 (1)

	Prodcom code	Production value (EUR million)	Rounding base (EUR million)	Volume of sold production (million)	Unit of volume	Rounding base (million)
Tufted carpets & other tufted textile floor coverings	17.51.13.00	3 613	-	660.4	m ²	-
Textile fabrics, coated	17.54.37.00	3 212	-	1 368.8	m ²	-
Knitted or crocheted fabrics (excluding pile fabrics)	17.60.12.00	2 824	-	369.9	kg	-
Woven fabrics of cotton of yarns of different colours (excluding denim)	17.20.20.Z5	1 693	-	532.3	m ²	-
Narrow woven fabrics other than labels, badges & other similar articles	17.54.11.30	1 655	-	-	-	-
Woven fabrics of synthetic filament yarns (excluding those obtained from high tenacity yarn or strip and the like)	17.20.31.50	1 612	-	1 228.4	m ²	-
Woven fabrics of combed wool or combed fine animal hair; woven fabrics of coarse animal hair	17.20.10.30	1 565	-	231.5	m ²	-
Women's or girls' jerseys, pullovers, sweatshirts, waistcoats and cardigans, of wool or fine animal hair (excluding jerseys and pullovers containing ≥ 50 % of wool and weighing ≥ 600g)	17.72.10.32	1 552	-	143.9	units	0.1
Curtains and interior blinds, curtain or bed valances, of woven materials	17.40.15.50	1 543	-	208.0	m ²	-

(1) Excluding products of a generic nature (other), sales of services such as repair, maintenance and installation; estimates; threshold of production value set at EUR 1.5 billion; the rounding base indicates the magnitude of the rounding employed to protect confidential cells (in the case of PRODCOM code 17.72.10.62, the volume of production lies within the range +/- 100 000 units of the reported value).

Source: Eurostat (PRODCOM)

manufacturing as a whole, although personnel costs accounted for a slightly higher share within the textiles sector (23.0 % in 2005). This higher share was, in part, due to the higher – albeit still relatively low – average personnel costs; average personnel costs within the EU-27's textiles manufacturing sector were EUR 21.5 thousand per employee, almost one third (33.0 %) more than the average across textiles, clothing and leather manufacturing in 2006.

The apparent labour productivity of the EU-27's textiles manufacturing sector in 2006 was EUR 28.3 thousand per person employed, which was also almost one third (31.0 %) more than the corresponding productivity level across textiles,

clothing and leather manufacturing as a whole. Adjusting productivity for the differences in average personnel costs, the resulting wage adjusted labour productivity ratio of the textiles manufacturing sector (131.5 %) was very similar to the average ratio across textiles, clothing and leather manufacturing as a whole (133.6 %). Bulgaria recorded a particularly high wage adjusted labour productivity ratio for textiles manufacturing (198.2 %) relative to its average ratio for textiles, clothing and leather manufacturing (145.4 %). Across all of the Member States⁽⁷⁾, however, the wage adjusted labour productivity ratios for the textiles manufacturing sector were lower than the corresponding ratios for the non-financial business economy.

(7) Bulgaria, Cyprus and Romania, 2005; Ireland, Luxembourg, Malta and the Netherlands, not available.

4.2: Clothing

This subchapter contains information on the manufacture of leather clothes, workwear, outerwear, underwear, and articles of fur (hereafter referred to as clothing manufacturing), as defined by NACE Division 18.

The manufacture of clothing involves design (styling, prototyping and choice of collections), development (patterns, sourcing fabric) and production (cutting, sewing, pressing and finishing) processes. Innovation is seen as an important requirement if clothing manufacturing in the EU is going to be more competitive in ever more global markets. The European Commission has already identified technical textiles for intelligent personal protective clothing and equipment (PPE) as a key area of high potential growth under its Lead Market Initiative⁽⁸⁾. Protective textiles comprise clothing and other textile-based systems whose main function is to protect users from hazards and dangers in the conditions in which they operate, such as civil and military emergency interventions or in hospitals and manufacturing environments that require insulation from bacterial and viral contamination. Various forms of support have been proposed to stimulate research and development in this area, as well as accelerating standardisation, raising the know-how of public purchasers and enhancing the coherence of safety user requirements. A further challenge

faced by small producers who want to develop new products and applications is the ease and ability to secure additional capital, whether from public or private bodies.

Structural profile

There were about 1.4 million people employed across the EU-27 by the 143.9 thousand enterprises that had clothing manufacturing (NACE Division 18) as their main activity in 2006. These enterprises generated EUR 22.5 billion of value added in 2006, accounting for about one third (34.7 %) of the value added generated by textiles, clothing and leather manufacturing (NACE Subsections DB and DC).

The principal clothing activity in the EU-27 is the manufacture of other wearing apparel and accessories (NACE Group 18.2) such as other outerwear and underwear, which generated the overwhelming majority (96.8 %) of clothing value added in 2006 and employed most of its workers. In more detail, the manufacture of other outerwear (NACE Class 18.22), such as coats, jackets and trousers, accounted for a clear majority (61.1 %) of clothing value added in 2006, with most of the rest (17.5 %) coming from the manufacture of other wearing apparel and accessories not elsewhere classified (NACE Class 18.24), such as babies garments, hats and headgear and also (13.1 %) the manufacture of underwear (NACE Class 18.23).

(8) COM (2007) 860 final.

Table 4.8: Manufacture of wearing apparel; dressing and dyeing of fur (NACE Division 18)
Structural profile, EU-27, 2006

	Enterprises (thousand)	Turnover (EUR million)	Value added (EUR million)	Persons employed (thousand)	Share in total (%)	
					Value added	Persons employed
Wearing apparel; dressing & dyeing of fur (1)	143.9	82 600	22 500	1 390.0	100.0	100.0
Leather clothes	3.3	:	:	:	:	:
Other wearing apparel & accessories	134.2	80 134	21 784	1 346.9	96.8	96.9
Workwear	8.2	3 746	1 141	77.8	5.1	5.6
Other outerwear	90.0	52 588	13 751	877.6	61.1	63.1
Underwear	8.6	10 843	2 947	211.2	13.1	15.2
Other wearing apparel & accessories n.e.c.	27.1	12 956	3 946	180.3	17.5	13.0
Dressing and dyeing of fur; articles of fur	6.4	1 364	406	21.7	1.8	1.6

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

Source: Eurostat (SBS)

Table 4.9: Manufacture of wearing apparel; dressing and dyeing of fur (NACE Division 18)
Structural profile: ranking of top five Member States in terms of value added and persons employed, 2006

	Highest value added (1)			Largest number of persons employed (1)			Most specialised: share in non- financial business economy (%) (2)	
	Country	(EUR million)	(% of EU-27)	Country	(thou- sand)	(% of EU-27)	Country	Value added
1	Italy	7 191	32.0	Romania	257.2	18.5	Romania	3.1
2	France	3 067	13.6	Italy	238.0	17.1	Bulgaria	2.9
3	Germany	2 440	10.8	Poland	160.9	10.9	Lithuania	1.6
4	Spain	2 283	10.1	Bulgaria	139.9	10.1	Portugal	1.5
5	United Kingdom	1 511	6.7	Portugal	111.3	8.0	Italy	1.1

(1) Luxembourg and Malta, not available; the Netherlands and Poland, 2005.

(2) Luxembourg, Malta and the Netherlands, not available; Bulgaria, Cyprus, Poland and Romania, 2005.

Source: Eurostat (SBS)

Among the Member States, Romania and Italy had by far the largest clothing manufacturing workforces, each employing about a quarter of a million workers (the equivalent of a combined 35.6 % of the EU-27 total), followed by Bulgaria with a 10.1 % share. In terms of the value added generated by the clothing sector, however, Italy was by far the largest Member State, the EUR 7.2 billion of value added in 2006 accounting for almost one third (32.0 %) of the total across the EU-27. By comparison, the value added generated in Romania accounted for only 4.0 % of the total. These differences in large part reflect the opposing ends of the clothing manufacturing spectrum; clothes manufacturing in Italy is more focused on higher value products (including many designer and luxury brands), whereas in Romania production is concentrated more on the labour-intensive stages of clothing production and mass-

market products. Nevertheless, the value added generated by the clothing manufacturing sector in Romania contributed 3.1 % of its non-financial business economy total in 2005, more than in any other Member State and about seven and a half times the EU-27 average. In these relative terms, only Bulgaria (2.9 %, 2005) was almost as specialised as Romania in the manufacture of clothing, with Lithuania (1.6 %) and Portugal (1.5 %) some way behind.

There was a strong downward trend in the production index of clothing manufacturing across the EU-27 during the period between 1997 and 2007, despite an abrupt levelling-off in 2006 and 2007. In the ten years through to 2007, the average rate of decline in clothing output across the EU-27 was 5.3 % per annum. However, this overall picture disguises contrasting developments in some of the Member States. There were

Table 4.10: Clothing (CPA Division 18)
Production of selected products, EU-27, 2007 (1)

	Prodcom code	Production value (EUR million)	Rounding base (EUR million)	Volume of sold production (million)	Unit of volume	Rounding base (million)
T-shirts, singlets & vests, knitted or crocheted	18.23.30.00	1 830	-	675.2	units	-
Articles of apparel of leather or of composition leather (including coats & overcoats) (excluding clothing accessories, headgear, footwear)	18.10.10.00	1 777	-	10.8	units	-
Women's or girls' blouses, shirts & shirt-blouses (excluding knitted or crocheted)	18.23.23.00	1 740	60	149.7	units	-
Women's or girls' jackets & blazers (excluding knitted or crocheted)	18.22.33.30	1 599	-	45.6	units	-
Women's or girls' dresses (excluding knitted or crocheted)	18.22.34.70	1 426	-	49.5	units	0.03
Men's or boys' shirts (excluding knitted or crocheted)	18.23.21.00	1 370	-	94.6	units	0.05
Men's or boys' suits (excluding knitted or crocheted)	18.22.22.10	1 234	-	17.7	units	-
Men's or boys' jackets and blazers (excluding knitted or crocheted)	18.22.23.00	1 190	-	25.3	units	-
Women's or girls' skirts & divided skirts (excluding knitted or crocheted)	18.22.34.80	1 114	0.8	73.4	units	-
Men's or boys' trousers & breeches, of denim (excluding for industrial or occupational wear)	18.22.24.42	1 070	-	57.3	units	-
Women's or girls' trousers & breeches, of wool or fine animal hair or man-made fibres (excluding knitted or crocheted and for industrial & occupational wear)	18.22.35.49	1 067	-	78.7	units	-

(1) Excluding products of a generic nature (other), sales of services such as repair, maintenance and installation; estimates; threshold of production value set at EUR 1 billion; the rounding base indicates the magnitude of the rounding employed to protect confidential cells (in the case of PRODCOM code 18.23.23.00, the value lies within the range +/- EUR 60 million of the reported value).

Source: Eurostat (PRODCOM)

particularly rapid and sustained declines in clothing manufacturing output in Belgium (an average 14.0 % per annum), France (16.1 % per annum) and Ireland (17.4 % per annum) between 1997 and 2007. For a time, production appeared to shift from west to east with strong growth in the Baltic Member States through to 2001 and in Romania through to about 2002 to 2003. However, after this time there were also steep declines in eastern European countries. Bulgaria stood alone among the Member States as having sustained and sometimes rapid growth in clothing manufacturing output; in the period between 2000 and 2007, the Bulgarian production index for clothing manufacturing more than doubled.

Among the NACE classes within other wearing apparel and accessories manufacturing activities (NACE Group 18.2), the fastest rate of decline in output across the EU-27 during the ten years through until 2007 was for underwear (8.6 % per annum). However, the decline in the output of the relatively small activity of the dressing and dyeing of fur and the manufacture of articles of fur (NACE Group 18.3) was even stronger (an average rate of 12.5% per annum).

Table 4.11: Manufacture of wearing apparel; dressing and dyeing of fur (NACE Division 18)
Expenditure, productivity and profitability, EU-27, 2006

	(EUR million)			(EUR thousand per person)	
	Personnel costs	Purchases of goods & services	Investment in tangible goods	Apparent labour productivity	Average personnel costs
Wearing apparel; dressing & dyeing of fur (1)	15 100	60 900	1 781	16.2	12.0
Leather clothes (2)	:	700	20	14.5	12.0
Other wearing apparel & accessories	14 708	59 064	1 733	16.2	12.0
Workwear	755	2 666	103	14.7	10.6
Other outerwear	9 284	39 403	1 188	15.7	11.6
Underwear	2 282	7 880	182	14.0	11.3
Other wearing apparel & accessories n.e.c.	2 388	9 115	260	21.9	15.4
Dressing & dyeing of fur; articles of fur	244	991	27	18.7	16.3

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

(2) Rounded estimates based on non-confidential data; personnel costs and apparent labour productivity, 2005.

Source: Eurostat (SBS)

Expenditure and productivity

Tangible investment across the clothing manufacturing sector amounted to EUR 1.8 billion in 2006, the equivalent of about a quarter (24.2 %) of the tangible investment in textiles, clothing and leather manufacturing as a whole. In comparison to the value added generated by the clothing sector, therefore, tangible investment was relatively low. The resulting investment rate of 7.9 % (less than one half of that across the non-financial business economy) may, at least in part, reflect the continued, further shift in production to non-member countries.

An analysis of the clothing manufacturing sector's operating expenditure shows that it was very similar to that of textiles, clothing and leather manufacturing as a whole, with about a fifth (19.9 %) of expenditure going on personnel costs. This was despite very low average personnel costs of EUR 12.0 thousand per employee – this average being lower than for any other NACE division within the non-financial business economy. The apparent labour productivity of those working in clothing manufacturing across the EU-27

was also less than any other NACE division in the non-financial business economy; average value added generated per person employed in clothing manufacturing was EUR 16.2 thousand in 2006, almost exactly one quarter less than the figure for textiles, clothing and leather manufacturing as a whole and approaching two thirds (62.8 %) less than the average across the EU-27's non-financial business economy.

Nevertheless, the value added generated in the clothing sector more than covered personnel costs in 2006, the resulting wage adjusted labour productivity ratio of 135.1 % in the EU-27 being very similar to the ratio for textiles, clothing and leather manufacturing as a whole. In Ireland, Greece, the Netherlands (2005), and Slovenia, however, value added per person employed did not cover average personnel costs. In contrast, the wage adjusted labour productivity ratios of the clothing manufacturing sectors in Italy, Sweden and the United Kingdom were not only higher than the average for textiles, clothing and leather manufacturing as a whole, but were similar to or a little higher than average ratios for the non-financial business economy.

4.3: Leather and footwear

This subchapter covers the leather and leather products manufacturing sector of NACE Subsection DC, hereafter referred to as leather manufacturing. It includes tanning and dressing, as well as the manufacture of luggage, handbags and footwear.

There are four key processes in leather manufacturing: hide and skin storage and beamhouse operations, such as sorting, trimming and curing; tannery operations, such as delimiting and tanning; post-tanning operations, such as washing and neutralisation; and finishing operations with respect to gloss, handle and colour. There is now strong environmental legislation through these processes, whether concerning best available techniques (BAT) for the tanning of hides and skins, the restriction of various dangerous substances and preparations in the process, or waste water legislation. There are other key policies on trade that greatly impact upon the sector, such as access to raw hides and skins (bovine and ovine), market access, trade distortions and possible non-member country protectionism, which are of increasing concern in the current economic climate.

Structural profile

Leather manufacturing (NACE Subsection DC) in the EU-27 was carried out as a main activity by about 44.0 thousand enterprises in 2006. These enterprises employed 548.8 thousand persons and generated EUR 11.9 billion of value added, representing 18.4 % of the total value added for textiles, clothing and leather manufacturing (NACE Subsections DB and DC).

The manufacture of footwear (NACE Group 19.3) was the largest activity within the leather manufacturing sector, accounting for about seven tenths (70.7 %) of employment and a smaller majority (58.2 %) of value added. The manufacture of luggage, handbags and the like (NACE Group 19.2) accounted for a further quarter (25.4 %) of the leather manufacturing sector's value added in 2006, the rest (16.4 %) coming from the activity of tanning and dressing leather (NACE Group 19.1).

Almost one half (49.5 %) of all the value added generated by the EU-27's leather manufacturing sector came from Italy – this was its largest share of any EU-27 industrial (NACE Sections C to E) subsection. The EUR 5.9 billion of value added generated by the sector in Italy was the equivalent of 0.9 % of the value added generated across the non-financial business economy, about four and a half times the average contribution in the EU-27. In these relative terms, the only Member State that was more specialised in leather manufacturing was Romania, where the value added from leather manufacturing accounted for 1.1 % of non-financial business economy added value in 2005. Whereas Italy was relatively specialised in all activities within leather manufacturing, the focus of Romania's specialisation was very much on footwear manufacturing.

There was a sharp downward trend in the production index of leather manufacturing in the EU-27 during the period between 1997 and 2007 (an average decline of 5.4 % per annum). Between 2001 and 2005, the rate of decline was particularly strong (an average -8.5 % per annum), mainly as a result of the steep falls noted for footwear manufacturing (an average -10.2 % per annum).

Table 4.12: Tanning and dressing of leather; manufacture of luggage, handbags, saddlery, harness and footwear (NACE Division 19)
Structural profile, EU-27, 2006

	Enterprises (thousand)	Turnover (EUR million)	Value added (EUR million)	Persons employed (thousand)	Share in total (%)	
					Value added	Persons employed
Tanning & dressing of leather; luggage, handbags, saddlery, harness & footwear (1)	44.0	47 235	11 929	548.8	100.0	100.0
Tanning & dressing of leather	3.7	10 671	1 957	51.9	16.4	9.5
Luggage, handbags & the like, saddlery	14.2	10 330	3 028	108.8	25.4	19.8
Footwear	26.6	26 233	6 944	388.1	58.2	70.7

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

Source: Eurostat (SBS)

Table 4.13: Tanning and dressing of leather; manufacture of luggage, handbags, saddlery, harness and footwear (NACE Division 19)

Structural profile: ranking of top five Member States in terms of value added and persons employed, 2006

	Highest value added (1)			Largest number of persons employed (2)			Most specialised: share in non-financial business economy (%) (3)	
	Country	(EUR million)	(% of EU-27)	Country	(thousand)	(% of EU-27)	Country	Value added
1	Italy	5 907	49.5	Italy	164.0	29.9	Romania	1.1
2	France	1 351	11.3	Romania	96.8	17.6	Italy	0.9
3	Spain	1 187	10.0	Spain	49.9	9.1	Slovenia	0.6
4	Germany	852	7.1	Poland	34.8	6.2	Bulgaria	0.4
5	United Kingdom	421	3.5	France	30.9	5.6	Hungary	0.3

(1) Denmark, Latvia, Malta, Portugal and Slovakia, not available; Bulgaria, the Netherlands, Austria, Poland and Slovenia, 2005.

(2) Denmark, Malta, Portugal and Slovakia, not available; the Netherlands, Austria, Poland and Slovenia, 2005.

(3) Denmark, Latvia, Malta, the Netherlands, Portugal and Slovakia, not available; Bulgaria, Cyprus, Austria, Poland, Romania and Slovenia, 2005.

Source: Eurostat (SBS)

Table 4.14: Tanning and dressing of leather; manufacture of luggage, handbags, saddlery, harness and footwear (NACE Division 19)

Expenditure, productivity and profitability, EU-27, 2006

	(EUR million)			(EUR thousand per person)	
	Personnel costs	Purchases of goods & services	Investment in tangible goods	Apparent labour productivity	Average personnel costs
Tanning & dressing of leather; luggage, handbags, saddlery, harness & footwear	7 990	35 869	1 059	21.7	16.0
Tanning & dressing of leather (1)	1 336	8 922	170	37.7	28.2
Luggage, handbags & the like, saddlery (1)	1 864	7 390	200	27.8	19.9
Footwear	4 790	19 557	680	17.9	13.3

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

Source: Eurostat (SBS)

during this period). Declines in footwear output continued in 2006 and 2007, although at about half the rate of the preceding four years. In 2006, there was a rebound in the output of tanning and dressing of leather, while the manufacture of luggage, handbags and the like recorded stable output in 2006 and strong growth in 2007.

Expenditure and productivity

Across the EU-27, tangible investment in the leather manufacturing sector was EUR 1.1 billion in 2006, by far the smallest share (14.4 %) of such investment across textiles, clothing and leather manufacturing as a whole. Indeed, when compared with the value added that the leather manufacturing sector generated, the corresponding investment rate of 8.9 % was among the very lowest across the NACE divisions that comprise industry and about one half of the rate recorded for the non-financial business economy. As with the clothing sector, this low investment rate may at least partly reflect a further shift in production to non-member countries.

The apparent labour productivity, average personnel costs and wage adjusted labour productivity ratio of the leather manufacturing sector in the EU-27 were almost identical to those recorded for textiles, clothing and leather manufacturing as a whole but, as a result, were considerably less than the averages across the non-financial business economy. Only in France and Germany did the wage adjusted labour productivity ratios of the leather manufacturing sector equal or slightly exceed the corresponding ratio for the non-financial business economy.

Average personnel costs in the EU-27's footwear subsector of EUR 13.3 thousand per employee were particularly low, as was the average value added generated by each person employed (EUR 17.9 thousand). These figures were about one half of the corresponding averages recorded for the tanning and dressing of leather subsector. However, the wage adjusted labour productivity ratios of each were very similar and almost the same as that for textiles, clothing and leather manufacturing as a whole.

Table 4.15: Manufacture of textiles (NACE Division 17)
Main indicators, 2006 (1)

	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	IT	CY	LV	LT
Enterprises	1.4	0.8	2.5	0.5	3.9	0.2	0.2	3.7	8.6	5.0	23.4	0.1	0.4	0.8
Persons employed	31.2	34.3	46.3	5.9	101.6	9.1	3.2	18.5	80.6	76.7	234.1	0.6	7.6	18.0
Turnover	6 004	623	2 024	1 053	14 772	282	345	1 338	8 319	12 072	32 278	30	164	364
Production	5 910	603	1 917	1 031	13 718	269	324	1 384	8 108	11 019	31 859	27	166	359
Purch. of goods & serv.	4 559	487	1 524	761	10 172	202	205	1 022	6 048	8 780	23 793	18	121	258
Value added	1 478	154	587	325	4 514	81	141	476	2 467	3 065	8 669	13	51	117
Personnel costs	1 088	76	356	231	3 364	57	84	332	1 799	2 623	5 667	8	33	88
Average personnel costs	36.5	2.3	8.1	40.3	34.2	6.3	27.1	22.2	23.9	35.0	28.5	15.3	4.5	5.1
Gross operating surplus	390	78	231	95	1 150	24	57	144	668	441	3 002	5	19	29
Gross investment	171	142	127	66	468	10	17	97	609	350	1 290	1	19	25
Apparent labour prod.	47.4	4.5	12.7	54.8	44.5	9.0	44.5	25.7	30.6	40.0	37.0	22.4	6.8	6.5
Wage adj. labour prod.	129.8	198.2	156.8	136.0	130.0	141.6	164.2	115.5	127.9	114.2	130.1	146.0	149.8	128.6
Gross operating rate	6.5	12.5	11.4	9.0	7.8	8.5	16.5	10.8	8.0	3.7	9.3	15.8	11.4	8.0
Investment rate	11.6	92.3	21.6	20.3	10.4	12.1	11.8	20.5	24.7	11.4	14.9	5.2	37.5	21.5
	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	NO
Enterprises	0.0	1.9	:	1.3	0.8	5.5	6.3	2.4	0.5	0.2	1.0	2.2	4.8	0.7
Persons employed	:	19.7	:	13.9	14.8	82.4	75.5	71.0	9.9	14.5	5.0	7.2	77.8	3.9
Turnover	:	510	:	2 577	2 112	2 875	3 775	1 034	724	380	666	959	9 096	624
Production	:	445	:	2 433	1 930	2 529	3 680	1 032	626	356	663	896	8 291	568
Purch. of goods & serv.	:	358	:	1 805	1 425	2 082	2 768	749	536	273	411	637	5 871	431
Value added	:	177	:	751	715	794	1 098	325	189	112	262	332	3 135	210
Personnel costs	:	120	:	513	514	435	834	225	132	84	178	250	2 148	155
Average personnel costs	:	6.6	:	40.6	36.1	5.7	11.2	3.2	13.7	5.8	37.5	38.6	29.3	42.3
Gross operating surplus	:	56	:	238	202	359	264	100	58	28	85	76	987	55
Gross investment	:	23	:	:	51	186	198	176	25	46	28	47	238	17
Apparent labour prod.	:	8.9	:	54.1	48.3	9.6	14.5	4.6	19.1	7.7	52.2	46.0	40.3	53.3
Wage adj. labour prod.	:	136.0	:	133.3	133.9	168.3	130.0	143.2	139.2	133.1	139.3	119.1	137.4	126.2
Gross operating rate	:	11.1	:	9.2	9.6	12.5	7.0	9.7	7.9	7.4	12.7	7.9	10.9	8.8
Investment rate	:	12.8	:	:	7.1	23.4	18.0	54.0	13.2	40.8	10.7	14.1	7.6	8.3

(1) The Netherlands and Poland, 2005; unless otherwise stated, values refer to EUR million; number of enterprises and number of persons employed are given in thousands; average personnel costs and apparent labour productivity are given in EUR thousand per person; wage adjusted labour productivity, gross operating rate and investment are ratios expressed as percentages.

Source: Eurostat (SBS)

Table 4.16: Manufacture of wearing apparel; dressing and dyeing of fur (NACE Division 18)
Main indicators, 2006 (1)

	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	IT	CY	LV	LT
Enterprises	1.1	4.6	7.5	0.4	2.7	0.4	0.1	12.7	12.8	12.0	36.7	0.4	0.9	2.2
Persons employed	7.5	139.9	33.5	2.4	54.5	10.7	1.5	37.3	93.2	67.4	238.0	1.3	13.1	32.3
Turnover	1 640	869	574	458	10 005	187	178	1 962	7 986	13 214	29 251	60	152	359
Production	1 579	846	537	426	9 238	151	66	1 954	7 695	10 101	28 119	52	158	364
Purch. of goods & serv.	1 297	566	393	360	7 520	113	151	1 504	5 855	10 253	22 243	42	88	216
Value added	345	325	217	124	2 440	75	-27	637	2 283	3 067	7 191	21	73	157
Personnel costs	224	221	173	83	1 642	61	38	423	1 667	2 239	4 291	16	46	123
Average personnel costs	34.8	1.6	6.3	39.6	31.6	5.7	26.6	17.4	19.7	34.3	22.7	14.4	3.7	4.0
Gross operating surplus	121	105	44	41	798	14	-65	214	616	828	2 899	5	26	34
Gross investment	27	67	22	12	128	7	2	67	178	182	580	1	8	14
Apparent labour prod.	46.3	2.3	6.5	52.6	44.8	7.0	-18.2	17.1	24.5	45.5	30.2	15.6	5.6	4.9
Wage adj. labour prod.	133.2	144.0	102.8	132.6	141.7	121.4	-68.3	98.2	124.6	132.9	133.0	108.5	152.2	120.6
Gross operating rate	7.4	12.0	7.7	9.0	8.0	7.2	-36.2	10.9	7.7	6.3	9.9	8.0	17.3	9.5
Investment rate	7.9	20.7	10.3	10.0	5.3	9.1	-6.5	10.5	7.8	5.9	8.1	6.5	10.4	8.7
	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	NO
Enterprises	0.0	4.4	:	1.5	0.9	17.7	11.3	5.7	1.0	0.3	1.1	1.7	3.9	0.6
Persons employed	:	38.7	:	5.0	8.0	160.9	111.3	257.2	10.6	24.2	4.3	1.7	37.8	1.4
Turnover	:	774	:	574	866	2 013	3 156	2 098	261	297	534	316	4 530	237
Production	:	672	:	519	717	1 798	3 069	2 043	222	275	452	285	3 937	220
Purch. of goods & serv.	:	560	:	431	611	1 201	2 104	1 308	149	184	373	239	2 951	172
Value added	:	242	:	138	265	762	1 095	894	111	118	170	81	1 511	77
Personnel costs	:	188	:	100	192	556	923	713	107	111	121	50	786	44
Average personnel costs	:	5.2	:	32.3	26.8	4.0	8.5	2.8	10.7	4.6	30.7	34.8	22.3	39.6
Gross operating surplus	:	55	:	39	73	207	172	181	5	7	49	30	726	33
Gross investment	:	15	:	:	13	80	100	176	8	10	8	5	56	5
Apparent labour prod.	:	6.3	:	27.9	33.2	4.7	9.8	3.5	10.5	4.9	39.7	48.8	40.0	53.5
Wage adj. labour prod.	:	119.9	:	86.6	123.6	119.5	116.0	124.7	97.6	106.0	129.5	140.4	179.3	135.1
Gross operating rate	:	7.1	:	6.7	8.4	10.3	5.5	8.6	1.7	2.4	9.2	9.3	16.0	13.7
Investment rate	:	6.2	:	:	5.0	10.5	9.2	19.7	7.1	8.5	4.8	6.4	3.7	6.3

(1) The Netherlands and Poland, 2005; unless otherwise stated, values refer to EUR million; number of enterprises and number of persons employed are given in thousands; average personnel costs and apparent labour productivity are given in EUR thousand per person; wage adjusted labour productivity, gross operating rate and investment are ratios expressed as percentages.

Source: Eurostat (SBS)

Table 4.17: Tanning and dressing of leather; manufacture of luggage, handbags, saddlery, harness and footwear (NACE Division 19)

Main indicators, 2006 (1)

	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	IT	CY	LV	LT
Enterprises	0.1	0.5	0.9	0.1	1.1	0.1	0.0	1.3	5.8	2.1	19.2	0.1	0.1	0.2
Persons employed	1.7	21.6	11.4	:	20.3	1.7	0.3	5.8	49.9	30.9	164.0	0.3	0.6	1.8
Turnover	382	125	214	:	3 452	30	44	334	4 738	3 964	26 128	16	:	35
Production	374	120	210	:	3 035	28	39	351	4 631	3 475	25 692	11	:	31
Purch. of goods & serv.	303	91	140	:	2 578	18	29	234	3 618	2 589	20 705	11	:	19
Value added	82	36	85	:	852	12	17	134	1 187	1 351	5 907	6	:	13
Personnel costs	55	28	70	:	566	10	8	89	878	959	3 613	4	:	7
Average personnel costs	35.4	1.5	6.6	:	29.6	6.0	29.2	19.9	18.9	31.6	26.9	14.9	:	4.2
Gross operating surplus	28	9	15	:	286	2	9	46	309	393	2 293	2	:	6
Gross investment	7	7	12	:	117	1	1	18	82	75	393	0	:	6
Apparent labour prod.	47.4	1.8	7.4	:	42.1	7.0	58.5	23.1	23.8	43.7	36.0	22.0	:	7.0
Wage adj. labour prod.	133.6	125.7	113.0	:	142.2	117.0	200.6	116.0	125.4	138.2	134.0	148.2	:	167.3
Gross operating rate	7.2	6.4	6.9	:	8.3	5.9	19.2	13.7	6.5	9.9	8.8	13.4	:	16.5
Investment rate	8.4	20.0	13.6	:	13.7	11.7	3.8	13.5	6.9	5.5	6.6	6.1	:	49.8
	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	NO
Enterprises	0.0	0.7	:	0.3	0.2	4.2	3.5	2.1	0.2	:	0.2	0.4	0.8	0.1
Persons employed	0.0	13.8	:	1.8	4.8	34.8	:	96.8	5.8	:	2.0	1.3	11.3	0.3
Turnover	0	381	:	332	833	758	:	947	383	:	206	185	1 115	42
Production	0	338	:	303	735	769	:	968	356	:	177	182	1 014	42
Purch. of goods & serv.	0	262	:	233	630	526	:	613	307	:	128	130	699	32
Value added	0	127	:	96	208	247	:	354	89	:	78	55	421	11
Personnel costs	0	78	:	63	139	142	:	278	70	:	54	44	279	10
Average personnel costs	:	5.8	:	41.8	29.9	4.8	:	2.9	12.4	:	28.6	36.6	26.0	36.9
Gross operating surplus	0	49	:	33	69	106	:	77	19	:	24	10	142	1
Gross investment	0	5	:	6	9	35	:	138	7	:	6	4	18	1
Apparent labour prod.	:	9.2	:	53.3	43.1	7.1	:	3.7	15.4	:	39.4	41.2	37.3	36.8
Wage adj. labour prod.	:	158.4	:	127.4	144.3	149.3	:	127.1	124.1	:	137.7	112.5	143.6	99.7
Gross operating rate	:	13.0	:	9.9	8.3	14.0	:	8.1	5.0	:	11.6	5.3	12.7	1.8
Investment rate	:	4.1	:	6.0	4.2	14.2	:	39.0	7.5	:	8.2	7.2	4.3	4.6

(1) Bulgaria, 2005, except for number of enterprises, number of persons employed and gross operating surplus; Austria and Slovenia, 2005, except for number of enterprises; the Netherlands and Poland, 2005; unless otherwise stated, values refer to EUR million; number of enterprises and number of persons employed are given in thousands; average personnel costs and apparent labour productivity are given in EUR thousand per person; wage adjusted labour productivity, gross operating rate and investment are ratios expressed as percentages.

Source: Eurostat (SBS)