

Statistics in focus

INDUSTRY, TRADE AND SERVICES

23/2004

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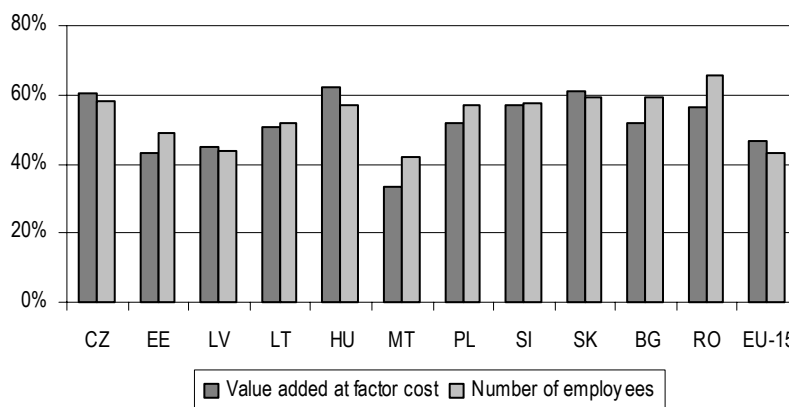
Manuscript completed on: 2.06.2005
ISSN 1561-4840
Catalogue number: KS-NP-04-023-EN-N
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Industry and construction in the New Member States and Candidate countries

This publication provides an overview on the industry and construction sectors in the 10 new Member States and 2 Candidate countries (Bulgaria and Romania). Industry activities refer to the following sections of the NACE Rev. 1 classification: Mining and quarrying (Section C), Manufacturing (Section D), and Electricity, gas and water supply (Section E). Construction corresponds to Section F of the classification. It should be noted that data for Hungary cover only enterprises with five or more persons employed, and are therefore not fully comparable with those of the other countries.

For the aims of this publication, the private enterprise sector comprises, in addition to industry and construction, trade and service activities corresponding to the NACE Rev. 1 sections G (Distributive trades), H (Hotel and restaurant services), I (Transport, storage and communications), and K (Real estate, renting and business activities).

Graph 1: Value added and employment in industry and construction as % of the total private sector, 2001



CZ: provisional data;

MT, EU-15: data for Electricity, gas and water supply (NACE Rev. 1 Section E) refer to 2000.

Taking into account the sectors considered, at EU-15 level industry and construction accounted for 47% of the value added and 43% of employment (measured in terms of the number of employees) of the total private sector. In most of the new Member States and Candidate countries, however, these activities accounted more than half of total value added and employment (see Graph 1).

Particularly high proportions (equal to or over 60%) were recorded in the Czech Republic, Hungary, and Slovakia (for value added) as well as in Romania (for employment).

Conversely, the countries where industry and construction appeared to be less important were Estonia and Latvia (with proportions in the total private sector close to the EU-15 average), as well as Malta (where industry and construction took the lowest shares).

Data in table 1 show the values of industrial production in the new Member States and Candidate countries. The manufacturing industry (NACE Rev. 1 Section D) was the most important activity within industry and construction. In 2001 values ranged from around

2 600 million euro in Malta to over 120 000 million euro in Poland. In relative terms, Hungary had the largest manufacturing industry: at more than 46 000 million euro, it accounted for 87% of the country's total industry. Manufacturing took the lowest shares in production in

Cyprus (62%), Estonia (66%), and Latvia (64%). In these countries, construction activities (NACE Rev. 1 Section F) were relatively more important. They accounted for 29% in Cyprus and for 23% in Estonia and Latvia.

Table 1: Production value in industry and construction, 2001 (million euro)

	CZ	EE	CY	LV	LT	HU	MT	PL	SI	SK	BG	RO
Mining and quarrying	1 883	127	47	33	139	269	12	7 857	225	298	522	2 733
Manufacturing	60 219	3 570	2 843	3 563	6 213	46 155	2 655	120 127	15 566	16 979	9 425	23 322
Electricity, gas and water supply	8 515	484	390	727	927	3 298	150	16 455	1 936	4 014	1 695	6 051
Construction	13 226	1 220	1 334	1 259	1 100	3 522	291	24 139	2 951	2 152	1 758	4 841

CZ: provisional data;

MT: data for Electricity, gas and water supply (NACE Rev. 1 Section E) refer to 2000.

Manufacturing: smaller countries more specialised than larger ones

The importance of specific products in total manufacturing industry, can be measured as their share in total manufacturing value added, and enables us to outline the specialisation of a country. Across the countries observed, in 2001 Malta, Bulgaria, and Latvia were the most specialised in various industries. At the same time, these countries showed a "weakness" in other activities. This is a characteristic typical of smaller countries, while larger ones (such as Poland and Hungary) appear to be, on one hand, less specialised, and, on the other, more autonomous in the manufacturing markets.

Regardless of the specialisation, the external trade of a country is obviously directly related to its size. Graph 2 shows the predominance of Poland, whose exports reached nearly 45 000 million euro in 2002, and imports nearly 60 000 million. The Czech Republic and Hungary followed at some distance, with values between 37 000 and 41 000 million euro for exports and 40 000 and 43 000 million euro for imports. As expected, the lowest values were recorded in the smallest countries (Cyprus and Malta).

In 2002, in all the new Member States and Candidate countries imports exceeded exports, with Poland, recording the highest trade deficit.

Table 2: Most and least specialised countries, 2001

NACE Rev. 1 Sub-section	Country for which the activity is	
	most important	least important
da food products; beverages and tobacco	Cyprus	Slovak Republic
db textiles and textile products	Bulgaria	Hungary
dc leather and leather products	Romania	Latvia
dd wood and wood products	Latvia	Malta
de pulp, paper and paper products; publishing and printing	Latvia	Romania
df coke, refined petroleum products and nuclear fuel	-	-
dg chemicals, chemical products and man-made fibres	Bulgaria	Malta
dh rubber and plastic products	Malta	Latvia
di other non-metallic mineral products	Cyprus	Malta
dj basic metals and fabricated metal products	Slovakia	Lithuania
dk machinery and equipment n.e.c.	Bulgaria	Malta
dl electrical and optical equipment	Malta	Cyprus
dm transport equipment	Czech Republic	Bulgaria
dn manufacturing n.e.c.	Malta	Hungary

CZ: provisional data.

Graph 2: Value of imports and exports of goods, 2002 (million euro)

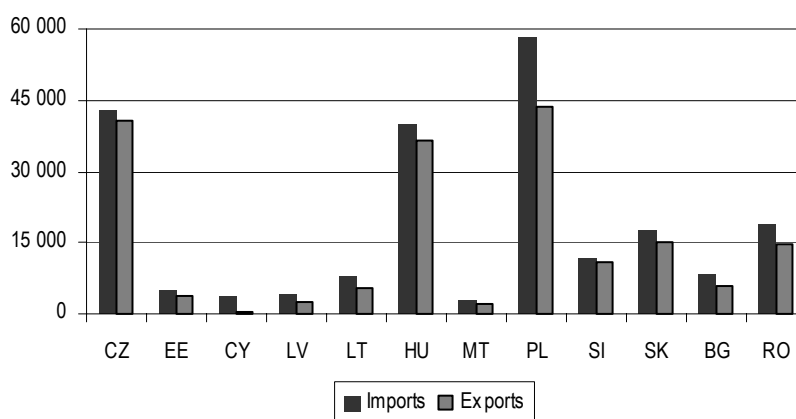


Table 3: Exports of goods by SITC Section, 2002 (%)

	CZ	EE	CY	LV	LT	HU	MT	PL	SI	SK	BG	RO
0 - Food and live animals chiefly for food	2.5	7.1	26.2	6.8	8.8	6.5	4.4	7.2	2.2	2.8	9.0	2.5
1 - Beverages and tobacco	0.7	0.6	2.6	2.9	0.8	0.3	0.9	0.3	1.3	0.4	2.5	0.3
2 - Crude materials, inedible except fuels	2.8	12.5	5.2	26.8	6.3	1.8	0.3	2.5	1.7	3.0	6.4	5.4
3 - Mineral fuels, lubricants and related materials	2.9	2.3	3.1	1.5	19.8	1.6	0.1	5.0	1.1	6.1	6.5	7.9
4 - Animal and vegetable oils, fats and waxes	0.1	0.4	1.2	0.0	0.2	0.2	0.0	0.0	0.1	0.1	0.3	0.1
5 - Chemicals and related products, n.e.s.	5.9	4.8	21.5	6.0	7.3	6.7	1.8	6.3	12.2	6.9	8.4	4.7
6 - Manufactured goods classified chiefly by material	23.5	21.0	10.5	29.5	11.0	10.4	5.6	23.8	26.1	26.8	24.0	18.8
7 - Machinery and transport equipment	49.7	29.0	11.4	8.3	26.0	59.3	65.7	37.6	37.2	39.6	13.5	21.3
8 - Miscellaneous manufactured articles	11.9	22.3	18.4	18.1	19.8	13.2	21.2	17.3	18.0	14.3	29.5	39.0
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Table 3 provides an overview of the breakdown of exports into the main SITC Rev. 3 sections. Manufactured goods classified chiefly by material (Section 6), together with machinery

and transport equipment (Section 7) generally accounted for the highest proportions in total exports. In particular, machinery and transport equipment reached shares around

(or higher than) 40% in the Czech Republic, Hungary, Malta, and Slovakia.

Employment predominant in manufacturing, females a minority

Table 4: Number of employees in industry and construction, 2001

	CZ	EE	CY	LV	LT	HU	MT	PL	SI	SK	BG	RO
Mining and quarrying	56 930	6 335	634	1 905	2 830	6 280	289	219 895	5 098	13 596	37 081	178 182
Manufacturing	1 246 730	121 669	33 766	154 076	240 543	752 562	28 352	2 134 152	239 384	419 687	566 985	1 753 787
Electricity, gas and water supply	69 444	10 383	1 535	17 272	31 811	65 905	2 976	225 281	10 985	45 987	59 387	180 697
Construction	259 174	30 155	20 795	42 642	67 062	116 177	4 757	517 461	61 699	73 813	97 682	355 590
Total Industry and construction	1 632 278	168 542	56 730	215 895	342 246	940 924	36 374	3 096 789	317 166	553 083	761 135	2 468 256

CZ: provisional data;

MT: data for Electricity, gas and water supply (NACE Rev. 1 Section E) refer to 2000.

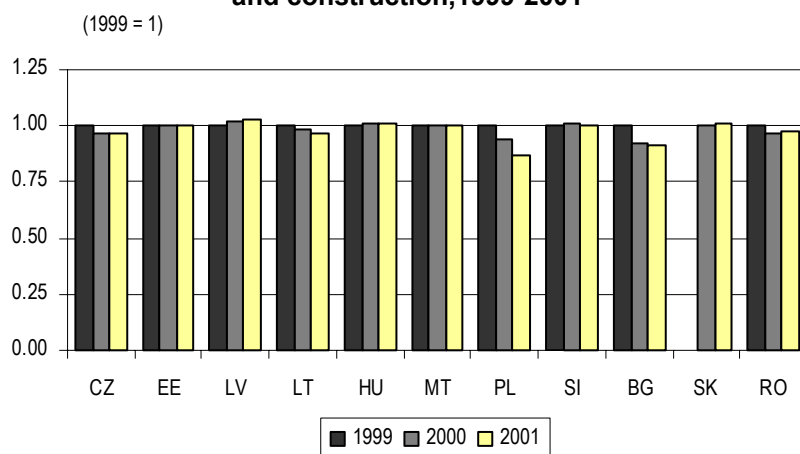
As in the case of production value, in 2001 employment (Table 4) was clearly concentrated in manufacturing industry (NACE Rev. 1 Section D), which recorded the highest values (in comparison with the other activities) in all the countries observed.

The most significant shares (in total industry plus construction) were 80% in Hungary, 78% in Malta, and 76% in the Czech Republic. Construction (NACE Rev 1 Section F) accounted for relatively low shares in total employment, which can partly be

explained by a substantial presence of self-employed workers in this activity. However, construction activities had, still, some importance for employment in Cyprus, Latvia, Lithuania, and Slovenia. Mining and quarrying (NACE Rev. 1 Section C) and Electricity, gas and water supply (NACE Rev. 1 Section E) generally have a more stable structure and their importance in total employment is directly related to the features of the territory and natural resources.

The overall level of employment (number of employees) appeared not to undergo remarkable changes over recent years (Graph 3), but there were disparities in the trends of the countries for which data are available. Between 1999 and 2001, the highest increases were recorded in Latvia (+3% over the 1999-2001 period) and Hungary (+0.7%). Conversely, the main downwards trends were those of Bulgaria, the Czech Republic and Poland.

Graph 3: Evolution of the number of employees in industry and construction, 1999-2001

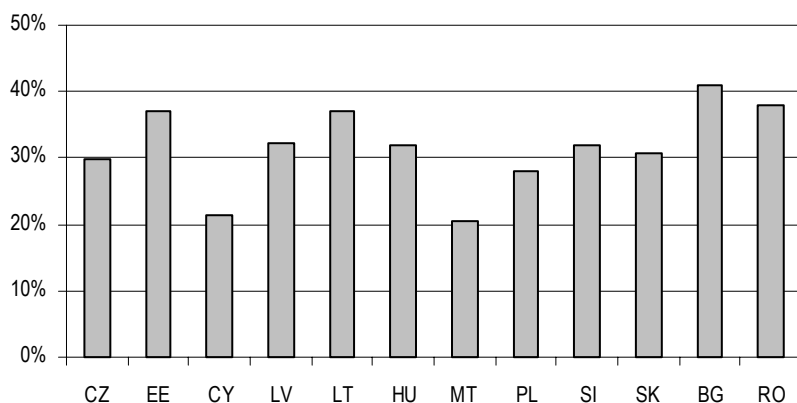


CZ: provisional data;

MT: data for Electricity, gas and water supply (NACE Rev. 1 Section E) refer to 2000;

SK: basis year is 2000 because, due to changes in the methodology adopted, data are not comparable with those relating to previous years.

Graph 4: Female employment as % of total employment in industry and construction, 2nd quarter 2003



Graph 4 shows the proportions of women employed in industry and construction: these were generally lower than 38% (Bulgaria was an exception at around 41%).

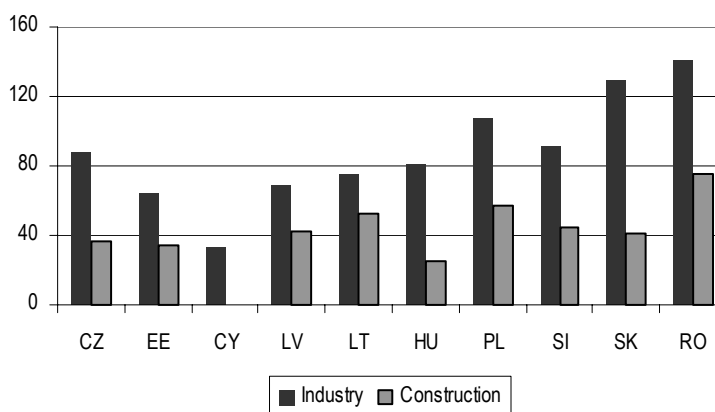
One of the possible explanations can obviously be found in the characteristics of the sectors themselves and, in particular, of construction activities, where traditionally male employment dominates. The highest proportions of female employment were recorded in the Baltic area and Bulgaria and Romania, possibly due to cultural features of these countries.

Most employees work in large enterprises, but small businesses dominate the sector

Graph 5 refers to enterprises employing 10 or more people, and shows the average size of such businesses in the year 2001. As expected, firms were, on average, always larger in industry than in construction. (It should be noted, however, that in comparison with industry activities, businesses operating in construction generally have a higher proportion of self-employed workers).

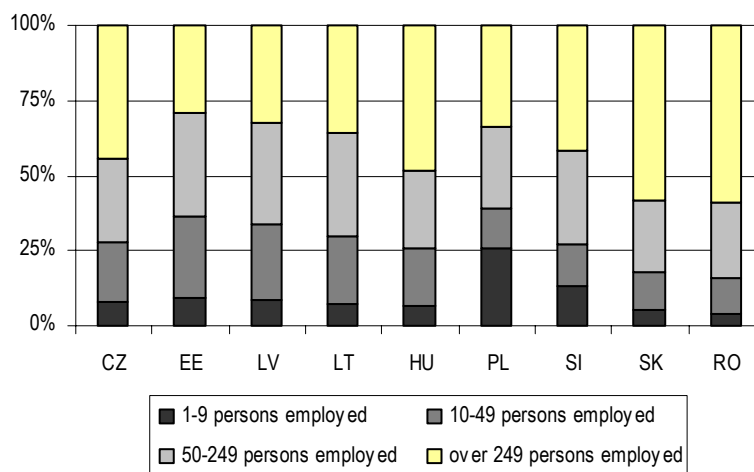
The largest construction firms were located in Poland (57 employees per enterprise) and Romania (75). These two countries - as well as Slovakia - also stood out for large enterprises in the industry sector (over 107 employees). Industrial activities appeared to be more fragmented in the Baltic area, where the average size of firms was equal to or lower than 75 employees, while Cyprus ranked at the bottom of the scale with 33 employees per enterprise. Regardless of the fragmentation of the market, very large firms (with more than 249 persons employed) were responsible for a substantial part of employment, as shown in Graph 6. In most of the countries that provided data, such firms accounted for more than 40% of total employees, with the highest shares in Romania and Slovakia (at nearly 60%). Only Poland saw a different pattern: micro enterprises accounted for around 25% of total employment.

Graph 5: Average number of employees per enterprise with 10 or more persons employed, 2001



CY: data for industry exclude Electricity, gas and water supply (NACE Rev. 1 Section E), data for construction not available;
CZ: provisional data.

Graph 6: Number of employees in industry and construction by enterprise size class, 2001



CY: data not available, SI: data refer only to manufacturing

Productivity and investments higher in industry than in construction

Within an economic activity, the labour productivity can be measured in terms of the value added that is generated by each worker. The value added data are expressed in current euro and therefore do not fully reflect currency volatility, inflation rates and purchasing power. A comparison of productivity across countries therefore needs to be made with the necessary caution.

Values in Graph 7 show that, except for Poland and, to a minor extent, Bulgaria, in 2001 labour productivity in construction was lower than in industry. This is not particularly surprising, since construction is generally more labour-intensive than other industrial activities.

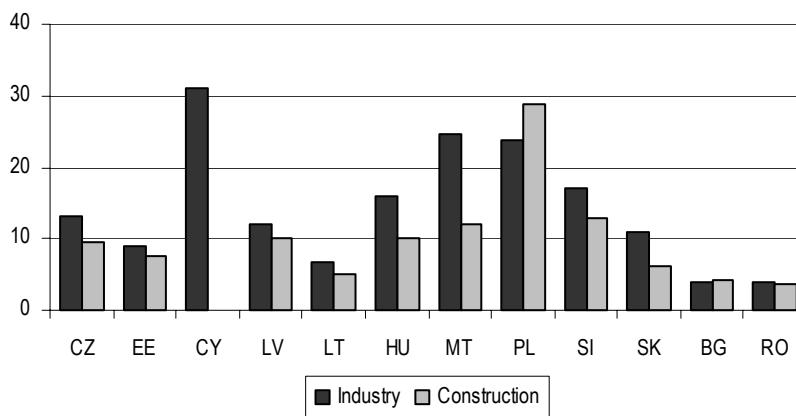
Poland was also an exception due to its high figures: the value added reached nearly 29 000 euro per employee in construction and nearly 24 000 euro in industry. However, the countries with the highest labour productivity in industry were Cyprus (31 100 euro per employee) and Malta (24 600 euro).

The lowest values were recorded in Bulgaria and Romania, where the value added was lower than 4 200 euro per employee, both for industry and construction.

Labour productivity is directly related to labour costs and, therefore, countries recording a high productivity tend to operate with high labour costs. This can be confirmed by the values in Graph 8: Bulgaria and Romania again held the bottom positions in the scale (with unit personnel costs below 3 000 euro per employee), while Cyprus (16 300 euro per employee in industry) and Malta (10 600 - 14 200 euro per employee respectively in industry and construction) ranked amongst the highest.

High unit labour costs - similar to those of Malta - were recorded in

Graph 7: Gross value added per employee, 2001 (1 000 euro)

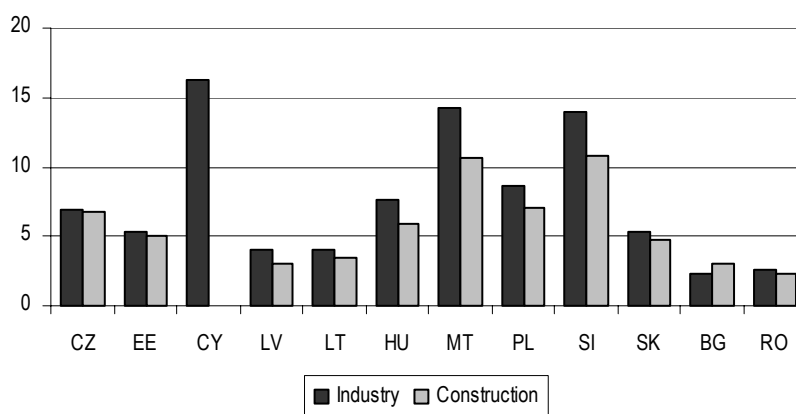


CY: all data refer to 2000;

CZ: provisional data;

MT: data for Electricity, gas and water supply (NACE Rev. 1 Section E) refer to 2000.

Graph 8: Unit labour cost, 2001 (1 000 euro)



CY: all data refer to 2000;

CZ: provisional data;

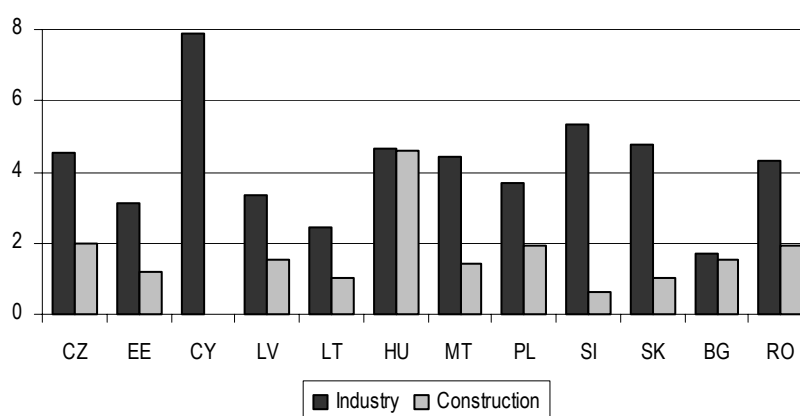
MT: data for Electricity, gas and water supply (NACE Rev. 1 Section E) refer to 2000.

Slovenia as well, but in this country labour productivity in industry was not too high. Poland also saw a "gap" between productivity and labour

costs, but with the reverse pattern: relatively low labour costs in comparison with an outstanding labour productivity.

Graph 9 provides an overview on gross investments in tangible goods in the new Member States and Candidate countries, measured in relation to the number of employees. In 2001, these were substantially higher in industry than in construction, in most cases more than the double. Hungary was the only exception to this pattern, with very high investments in construction (around 4 600 euro per employee, which was nearly the same value as industry). Across the other countries that provided data, investments in construction ranged between 600 and 1 980 euro per employee. As for industrial activities, the value of investments varied from 1 680 to 5 320 euro per employee, with Cyprus outstanding at nearly 7 900.

Graph 9: Investments per employee (1 000 euro), 2001



CZ: provisional data;

CY: all data refer to 2000;

MT: data for Electricity, gas and water supply (NACE Rev. 1 Section E) refer to 2000.

Key variables

Table 5: Key variables by activity, 2001

Activity (Nace Rev.1)	CZ (1)	EE	CY	LV	LT	HU	MT (2)	PL	SI	SK	BG	RO (3)
Number of enterprises (units)												
Mining	244	62	95	50	68	132	78	1 373	180	70	190	321
Manufacturing	131 582	4 226	6 275	4 951	9 577	15 130	3 674	199 993	25 691	6 368	25 717	42 787
Electricity, gas, water supply	707	283	91	265	233	293	4	1 839	458	130	186	346
Construction	119 764	2 205	5 688	2 337	3 115	7 774	3 658	174 843	15 605	3 691	18 305	14 299
Turnover (million euro)												
Mining	2 063	129	43	33	136	292	11	7 353	208	306	510	3 276
Manufacturing	63 840	3 854	3 036	3 627	6 461	51 691	2 592	125 319	16 902	18 061	10 056	23 815
Electricity, gas, water supply	8 504	754	386	718	1 209	7 225	146	23 655	1 941	4 034	2 809	5 429
Construction	13 766	1 265	1 334	1 280	1 124	6 286	276	25 792	3 013	2 309	1 792	4 715
Value added at factor cost (million euro)												
Mining	932	58	24	19	72	110	7	5 864	110	159	204	246
Manufacturing	14 902	986	928	1 635	1 366	11 567	750	45 211	4 027	3 930	1 737	6 880
Electricity, gas, water supply	2 389	187	214	419	427	1 577	22	10 209	227	1 203	605	1 103
Construction	2 475	232	722	428	338	1 154	58	14 862	793	459	408	1 276
Gross operating surplus (million euro)												
Mining	409	17	10	10	56	44	3	2 742	6	83	65	-491
Manufacturing	6 529	372	375	1 064	473	6 096	351	28 742	791	1 781	585	2 120
Electricity, gas, water supply	1 744	113	162	307	230	880	-26	7 607	9	880	338	56
Construction	713	80	227	290	107	472	18	11 229	127	109	116	437
Personnel costs (million euro)												
Mining	523	41	14	8	17	66	3	3 122	104	76	140	886
Manufacturing	8 373	614	553	576	893	5 472	399	16 469	3 236	2 148	1 152	3 948
Electricity, gas, water supply	645	73	51	111	197	697	48	2 601	218	324	267	777
Construction	1 771	152	495	131	230	682	50	3 633	666	350	292	800
Gross investment in tangible goods (million euro)												
Mining	267	19	15	5	31	25	1	725	29	66	53	1 352
Manufacturing	4 734	288	207	383	427	3 137	140	6 315	1 065	1 717	806	3 417
Electricity, gas, water supply	1 229	125	34	190	214	675	0	2 503	264	504	255	4 351
Construction	513	36	44	65	68	534	7	992	37	77	150	681

(1) provisional data

(2) 2000 data for Electricity, gas and water supply

(3) 2000 data for gross operating surplus

(4) 2000 data for Electricity, gas and water supply, 1999 data for gross operating surplus for Construction, 1999 data on personnel costs for Electricity, gas and supply

(5) HU data only cover enterprises with 5 or more persons employed

➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

Databases

This Statistics in Focus is based on structural business statistics collected under the terms of Council Regulation (EC, EURATOM) No 58/97 of 20 December 1996. The reference data are stored in Eurostat's reference database New Cronos (theme 4 - domain SBS – collection enterpr: annual enterprise statistics – dft files: enter_ms and enter_cc; size class).

Data on employment are also taken from the LFS (Labour Force Survey). These data are collected in accordance with Council Regulation N° 577/98 adopted in 1998, which replaced the previous Regulation to take account of new statistical requirements. The methodological basis and the contents of this new series of surveys are described in the publication entitled "Labour Force Survey - Methods and Definitions - 1998 edition".

Data on external trade of goods are derived from the domain "External Trade" of Eurostat's Comext database (et-efcc database).

The figures shown reflect the situation of the databases as of 1 March 2004.

Data coverage and methodological remarks

The currency data are expressed in current euro and therefore do not fully reflect currency volatility, inflation rates and purchasing power.

There are still a number of discrepancies between the various new Member States and Candidate countries regarding the statistical population covered as well as the methodologies. In particular, data for Hungary cover only enterprises with five or more persons employed. No data are available for those countries that are not shown in the graphs and tables.

Symbols

Throughout the publication the sign “.” stands for “Not available” and the sign “c” for “Confidential”.

Statistical classification

The data are collected mainly on the basis of the Statistical Classification of Economic Activities in the European Community (NACE Rev. 1). This SiF deals with the following **Sections of the classification**: C (Mining and quarrying), D (Manufacturing), E (Electricity, gas and water supply), and F (Construction). For the purposes of this publication, the enterprise sector as whole

covers, in addition to the above-mentioned activities, the NACE Rev. 1 Sections G (Distributive trades), H (Hotel and restaurant services), I (Transport, storage and communication services), and K (Real estate, renting and business services).

The external trade of goods are collected on the basis of the Standard International Trade Classification (SITC Rev.3).

SBS variables

Number of enterprises

A count of the number of enterprises registered to the population concerned in the business register corrected for errors, in particular frame errors. Dormant units are excluded.

Number of employees

The number of employees is defined as those persons who work for an employer and who have a contract of employment and receive compensation in the form of wages, salaries, fees, gratuities, piecework pay or remuneration in kind.

Number of persons employed

The total number of persons who work in the observation unit (employees receiving remuneration, working proprietors and unpaid family workers) as well as outside working persons who belong to the unit and are paid by it. It includes all persons who are on the payroll of the enterprise, whether they are temporarily absent (excluding long-term absences), part-time, seasonal or home workers, apprentices etc.

Production value

The production value measures the amount actually produced by the unit, based on sales, including changes in stocks and the resale of goods and services. The production value is defined as turnover, plus or minus the changes in stocks of finished products, work in progress and goods and services purchased for resale, minus the purchases of goods and services for resale, plus capitalised production, plus other operating income (excluding subsidies). Income and expenditure classified as financial or extraordinary in company accounts is excluded from production value. Included in purchases of goods and services for resale are the purchases of services purchased in order to be rendered to third parties in the same condition.

Turnover

Turnover comprises the totals invoiced by

the observation unit during the reference period, which corresponds to market sales of goods or services supplied to third parties. It includes all duties and taxes on the goods and services invoiced by the unit, with the exception of the VAT invoiced by the unit vis-à-vis its customers and other similar deductible taxes directly linked to turnover.

Value added at factor cost

Value added at factor cost is the gross income from operating activities after adjusting for operating subsidies and indirect taxes. It can be calculated from turnover, plus capitalised production, plus other operating income, plus or minus the changes in stocks, minus the purchases of goods and services, minus other taxes on products which are linked to turnover but not deductible, minus the duties and taxes linked to production.

Personnel costs

Personnel costs are defined as the total remuneration, in cash or in kind, payable by an employer to an employee in return for work done by the latter during the reference period. Personnel costs also include taxes and employees' social security contributions retained by the unit as well as the employer's compulsory and voluntary social contributions.

Unit labour cost

Unit labour cost is defined as personnel costs per employee.

Gross investment in tangible goods

Investment during the reference period in all tangible goods. Included are new and existing tangible capital goods, whether bought from third parties or produced for own use (i.e. capitalised production of tangible capital goods), having a useful life of more than one year, including non-produced tangible goods such as land.

The above SBS variables are laid down in Commission Regulation (EC) No 2700/98 of 17 December 1998.

More information on business statistics methodology can be found at:

<http://europa.eu.int/comm/eurostat/ramon/>

or
http://forum.europa.eu.int/Public/irc/dsis/bmethods/info/data/new/main_en.html

The above-mentioned Regulations and statistical classification can be downloaded under 'legal texts'

Further information:

➤ Databases

NewCronos, Theme 4, Domain: sbs

To obtain information or to order publications, databases and special sets of data, please contact the **Data Shop** network:

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