

Statistics in focus

INDUSTRY, TRADE AND SERVICES

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Author
Walter Sura

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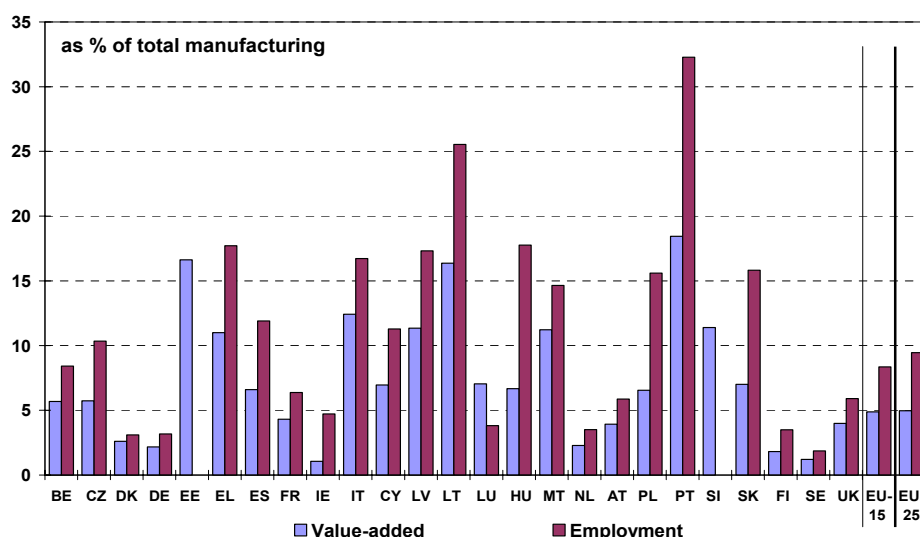
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The textile industry in the EU

In the textile industry, two groups can be distinguished: the manufacture of textiles and textile products (NACE Rev.1, subsection DB), including e.g preparation and spinning of textile fibre, weaving, finishing of textiles - and the manufacture of leather and leather products (subsection DC), which covers i.a. tanning and dressing of leather, manufacture of luggage, handbags and footwear. In 2001, value-added in constant prices, were in the range of the level 10 years before. Moreover, the production increased by only 5% between 1991 and 2001, while the total manufacturing registered an increase of 51% for the same period.

According to the Structural Business Statistics (SBS), the textile industry employed close to 3.3 million people in the European Union in 2001, or some 9.5% of the total working in manufacturing. This sector accounts for a smaller share of value-added in the EU than employment – only 5% of the total generated in manufacturing in 2001 – reflecting the relatively low level of productivity per person employed (Graph 1).

Graph 1: Employment and value-added in textile industry in Member States, 2001



DK: 1999 for subsection DC; EL: 2000 (enterprises with 20 persons or more employed); IE: 2000; EE, SI: employment data n.a.; PL: employment 1998.

Source: Eurostat.

The importance of the textile industry in the manufacturing sector varies greatly across the Union. It is of most importance for both employment and value-added in Portugal. Italy is the main contributor to the value-added produced by the sector in the EU (Table 1).

Table 1: Importance of textile industry in the EU and Member States, 2001

Sector	Total EU employment (in 1000)	Total EU value-added (in bn EUR)	Main contributor to value-added	Most specialised Member State	Least specialised Member State
Textiles (17)	1 314.7	37.8	Italy	Portugal	Finland
Clothing (18)	1 354.1	25.3	Italy	Lithuania	Luxembourg
Leather and footwear (19)	586.8	13.5	Italy	Portugal	Sweden
Textile industry (DB+DC)	3 255.5	76.7	Italy	Portugal	Sweden
Total manufacturing (D)	34 254.0	1 536.5	---	---	---
Total business economy (C to K excl. J)	105 192.5	4 584.0	---	---	---

Notes: DK: 1999 for NACE DC; EL: 2000, enterprises with 20 persons or more employed; IE: 2000; Most/least specialised Member State: see methodological notes for details.

Source: Eurostat, unless otherwise mentioned.

A labour-intensive industry

The highly labour-intensive nature of the textile sector is evident when looking at the latest data for apparent labour productivity, which shows that in 2001 this sector had a productivity level that was 53% of the EU's manufacturing average (Table 2), the share being lower than in any other manufacturing NACE subsection. The ratio was between 40% and 70% in the majority of Member States in 2001, although productivity was higher in Denmark, Italy, Luxembourg and Malta and lower than 35% of the national manufacturing average in Latvia and Hungary.

In 2001, the textile industry in the EU employed more than 200 000 people in Germany, Spain, France, Italy, Poland, Portugal and in the United Kingdom. Most of the employed people in the textile industry worked in the manufacturing of textiles and textile products (divisions 17 and 18), whereas the manufacturing of leather products (NACE DC) represented less than a fifth of the employment in the textile industry of all the countries, except Spain, Italy, Portugal and Slovakia. Almost half of the production of the EU textile industry was generated by the manufacture of textiles (NACE division 17), just over 30% was generated by the manufacture of

wearing apparel (division 18), and only just under 20% was generated by the manufacturing of leather products (division 19).

Italy was by far the biggest producer in each of the three NACE divisions covered, with an overall production value of EUR 95 billion in 2001. The next biggest producers were Germany, Spain, France and the United Kingdom, with a production value between a fifth and a third of the amount produced by Italy.

According to preliminary 2002 SBS data, the share of the production of the textile industry in the total generated in manufacturing exceeded 10% in Portugal, Estonia, Italy and in Lithuania. The share of employment of the textile industry in the EU in the total manufacturing was particularly high in the same countries: 32% in Portugal, 25% in Lithuania, 20% in Estonia and 17% in Italy.

Average personnel costs in this sector, representing 53% of the manufacturing average, were again below all other manufacturing NACE subsections.

Table 2: Main indicators in textile industry, 2001

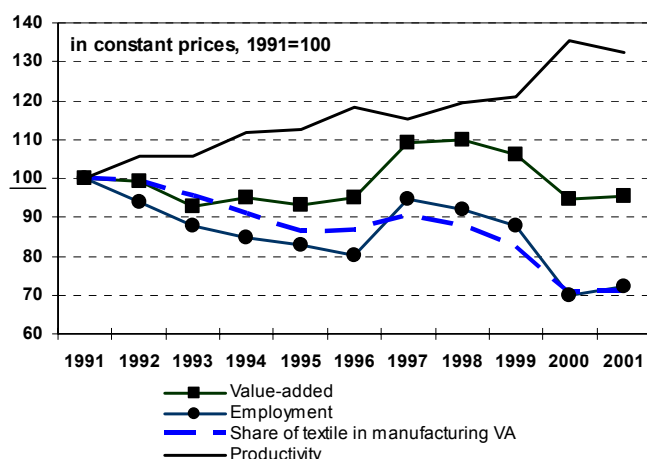
in mio EUR	BE	CZ	DK	DE	EE	EL	ES	FR	IE	IT	CY	LV	LT	LU	HU
Manufacture of textiles (NACE division 17)															
Production	7 162	1 772	1 137	15 677	232	1 357	9 395	15 151	495	40 020	35	182	298	503	544
Value added at factor cost	1 964	524	396	5 274	74	530	3 026	4 149	196	10 946	14	108	98	161	192
Personnel costs	1 277	338	279	4 118	45	290	2 088	3 347	136	6 257	9	43	81	55	146
Number of persons employed (in 1000)	43	69	9	136	11	17	115	119	7	298	1	11	21	1	31
Apparent labour productivity (in 1000 EUR/pers.emp.)	45.2	7.6	46.0	38.7	6.9	30.6	26.3	35.0	28.1	36.8	17.0	10.3	4.6	126.2	6.3
Manufacture of wearing apparel; dressing; dyeing of fur (NACE division 18)															
Production	2 023	596	702	10 345	156	1 064	7 379	11 886	320	29 842	91	118	257	2	832
Value added at factor cost	462	244	190	2 684	66	373	2 472	3 211	140	8 107	38	68	132	1	324
Personnel costs	252	192	131	2 072	51	242	1 790	2 492	89	4 701	27	42	98	1	260
Number of persons employed (in 1000)	11	56	5	75	14	19	134	96	4	307	3	15	39	0	67
Apparent labour productivity (in 1000 EUR/pers.emp.)	41.4	4.4	40.9	35.9	4.9	19.9	18.4	33.3	32.5	26.4	13.9	4.5	3.4	16.2	4.9
Manufacture of leather and leather products (NACE division 19)															
Production	276	266	380	3 814	39	209	5 732	4 320	83	25 244	26	14	41	0	223
Value added at factor cost	87	85	78	1 006	13	78	1 372	1 589	22	6 140	12	4	10	0	98
Personnel costs	64	79	47	760	10	47	982	1 136	15	3 382	7	5	10	0	79
Number of persons employed (in 1000)	2	19	2	28	:	4	66	45	1	204	1	3	4	0	24
Apparent labour productivity (in 1000 EUR/pers.emp.)	35.5	4.5	48.7	36.0	:	22.0	20.7	35.4	28.3	30.1	20.2	1.6	2.8	:	4.0
Manufacture of textiles and textile products; manufacture of leather and leather products (NACE subsections DB and DC)															
App. labour productivity	44.0	5.9	44.7	37.5	:	24.8	21.7	34.5	29.7	31.2	15.4	3.6	2.5	123.1	4.1
Manufacturing (NACE section D)															
App. labour productivity	65.2	10.7	53.6	54.7	8.0	39.8	39.2	50.9	132.2 (a)	42.0	25.0	10.6	5.5	66.7	15.3

Notes: DK: 1999 for NACE DC; EL: 2000 (enterprises with 20 persons or more employed); IE: 2000; EE, LT, HU : 1999; LV: 1998.

(a) data not comparable with other Member States; especially due to accounting practice of international enterprises.

Value-added (in constant prices) of the EU-15's textile sector was only slightly lower in 2001 (only 4%) than 10 years earlier at the beginning of the 1990s (Graph 2). Nevertheless the share of textile industry in overall value-added of the manufacturing sector in the EU-15 deteriorated over the past decade from 6.3% in 1991 to 4.5% in 2001. This decline was quite steady until 1995, after which, despite a very low recovery in 1996 and 1997, the share of value-added declined even more strongly until 2000 to slightly rise in 2001. Despite the very low decline of value-added in textile industry, the number employed in the industry in the EU-15 was almost 28% lower in 2001 than in 1991, implying that value-added per person employed, or productivity, rose by just over 32% over this period.

Graph 2: Evolution of value-added, employment and productivity in the EU-15, 1991-2001



Value-added concentrated in the manufacture of textiles

The largest sector of the textile industry is the manufacture of textiles (NACE division 17) which accounted for 49% of value-added in 2001. The remainder was split 33% for the manufacture of clothing (division 18) and 18% for the manufacture of leather and footwear (division 19). The share of manufacture of textiles in total manufacturing value-added was 2.5% (Graph 3). The "manufacture of other textiles" (NACE group 17.5), which includes the manufacture of carpets, rugs, cord, rope, twine and netting was the largest subsector (0.6% in terms of value-added in total

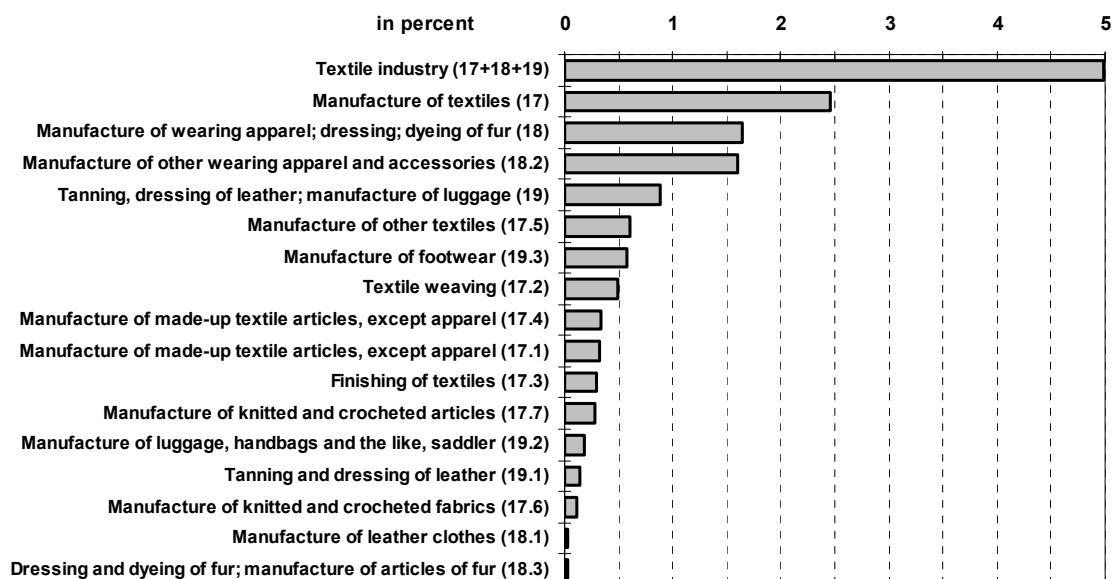
manufacturing), followed by textile weaving (NACE group 17.2) with 0.5%. The share of the clothing sector in total manufacturing value-added was 1.7% and the manufacture of other wearing apparel (group 18.2) was by far the largest subsector, accounting for 1.6% in total manufacturing. Finally the share of leather and footwear sector in total manufacturing value-added was 0.9%, the manufacture of footwear (group 19.2) being by far the largest subsector, accounting for 0.6% of total manufacturing value-added.

Table 2: Main indicators in textile industry, 2001 (continued)

in mio EUR	MT	NL	AT	PL	PT	SI	SK	FI	SE	UK	EU-15	EU-25	BG	RO	NO	CH
Manufacture of textiles (NACE division 17)																
Production	43	2 928	2 455	2 425	4 675	713	243	677	1 021	12 395	115 048	121 534	273	759	504	2 016
Value added at factor cost	23	922	834	1 117	1 391	182	88	272	370	4 911	35 341	37 760	77	290	208	814
Personnel costs	11	616	640	489	955	155	70	175	274	3 469	23 976	25 362	53	179	154	636
Number of persons employed (in 1000)	1	21	20	123	100	:	19	6	10	127	1 029	1 315	33	107	5	14
Apparent labour productivity (in 1000 EUR/pers.emp.)	28.3	43.0	42.0	9.1	14.0	:	4.5	45.0	37.8	38.7	34.3	28.7	2.4	2.7	44.0	60.3
Manufacture of wearing apparel; dressing; dyeing of fur (NACE division 18)																
Production	148	666	842	2 236	3 484	302	226	555	290	7 389	76 788	81 749	415	1 300	124	1 036
Value added at factor cost	49	199	302	1 401	1 177	148	109	199	89	3 166	22 769	25 350	191	708	55	290
Personnel costs	34	139	242	720	929	140	97	157	60	1 600	14 895	16 556	147	467	34	234
Number of persons employed (in 1000)	3	8	11	238.4	126	:	30	7	4	83	890	1 354	127	313	1	6
Apparent labour productivity (in 1000 EUR/pers.emp.)	16.8	24.3	28.5	5.9	9.3	:	3.6	29.0	25.3	38.1	25.6	18.7	1.5	2.3	45.5	46.0
Manufacture of leather and leather products (NACE division 19)																
Production	42	377	903	916	2 483	225	214	239	180	2 360	46 597	48 603	83	528	56	247
Value added at factor cost	13	114	273	444	733	86	78	91	47	1 065	12 694	13 537	29	233	18	77
Personnel costs	10	73	159	189	553	81	58	62	38	519	7 836	8 362	23	165	13	93
Number of persons employed (in 1000)	1	3	6	66.1	68	:	17	3	2	20	452	587	19	112	0	3
Apparent labour productivity (in 1000 EUR/pers.emp.)	14.5	39.7	42.1	6.7	10.8	:	4.6	34.5	30.2	54.2	28.1	23.1	1.5	2.1	43.1	29.1
Manufacture of textiles and textile products; manufacture of leather and leather products (NACE subsections DB and DC)																
App. labour productivity	18.4	38.0	38.2	6.9	11.2	:	4.1	36.8	34.0	39.8	29.9	23.6	1.5	2.3	44.3	55.7
Manufacturing (NACE section D)																
App. labour productivity	23.9	58.3	57.0	16.5	19.7	:	9.3	71.3	52.2	58.9	51.2	44.9	2.9	3.8	65.0	:

Notes: PL: 1998 for number of persons employed, apparent labour productivity: value-added (2001) divided by number of persons employed (1998); SI, CH: 1999; BG: 2000.

Graph 3: Share of textile industry in manufacturing value-added in the EU, 2001

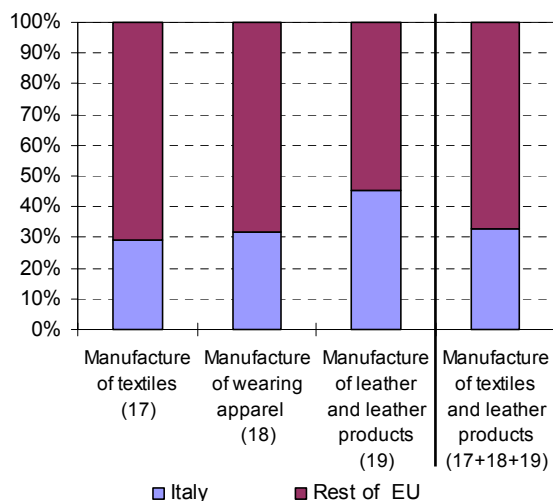


Italy biggest contributor in value-added

Italy had by far the largest textile sector in the EU. Indeed, this country was the biggest producer in each of the three NACE divisions covered, with overall value-added of EUR 25.2 billion in 2001, equivalent to a third of the EU total (Graph 4). This value was nearly three times the share of the next highest level of output, with the United Kingdom, Germany and France all accounting for close to 12% of the total.

Spain registered 9% of the total, while the other countries accounted for less than 5% of the total. Italy's importance in EU textile industry was particularly obvious in the manufacture of leather and leather products (NACE division 19), with a value-added accounting for 45% of the EU total in this subsector.

Graph 4: Share of value-added of Italy in textile industry in the EU, 2001

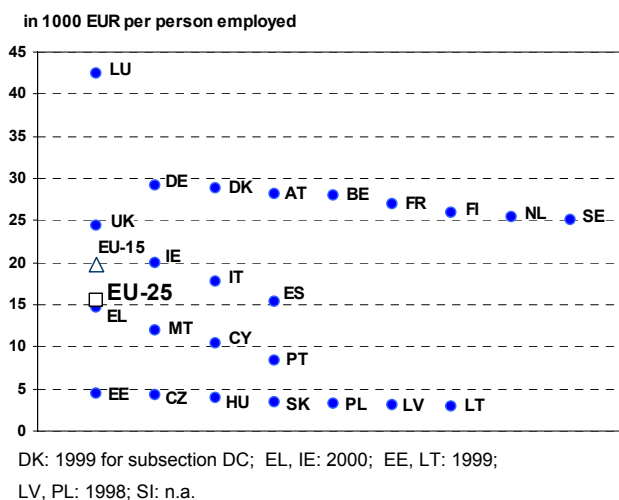


A relatively low wage level

In 2001, average wage levels in the textile industry varied considerably across the European Union, ranging from EUR 2 900 per employee in Latvia to EUR 42 400 in Luxembourg (Graph 5).

Average personnel costs in the textile industry were below manufacturing averages in every Member States, except Luxembourg. Average personnel costs were generally between 50% and 80% of national manufacturing averages, with Malta (93%), Denmark (88%) and Latvia (87%) the only other countries outside this range. To some extent this can be attributed to the higher proportion of part-time employment.

Graph 5: Wage per employee in textile industry in Member States, 2001



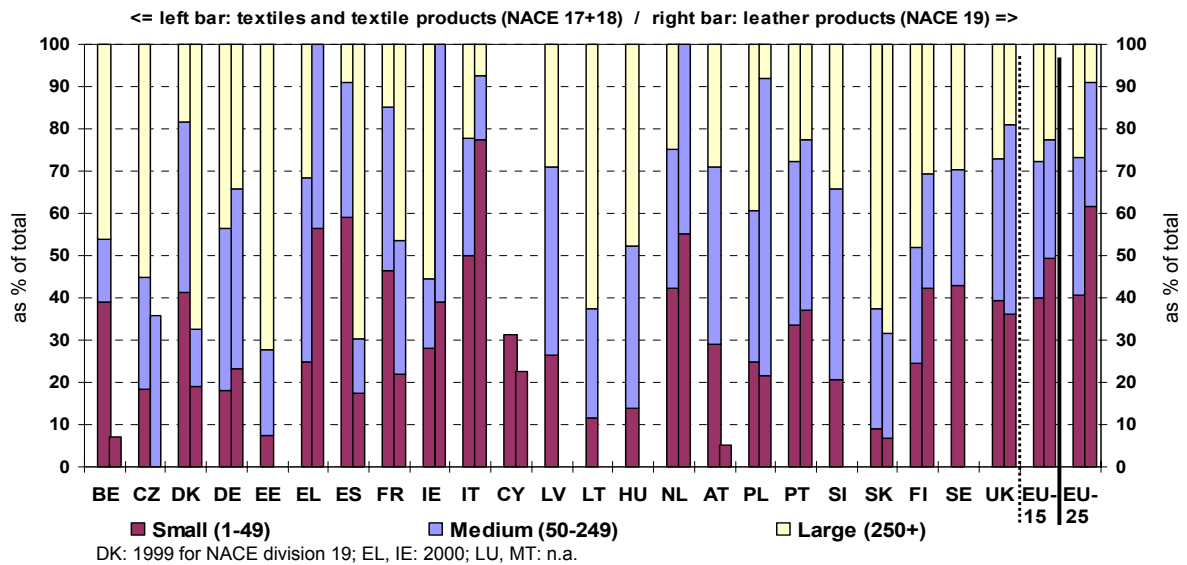
DK: 1999 for subsection DC; EL, IE: 2000; EE, LT: 1999; LV, PL: 1998; SI: n.a.

Small enterprises particularly important in the textile industry

In 2001, the manufacture of textiles and textile products (NACE divisions 17 and 18) generated EUR 63.1 billion of value-added in the EU, some 41% of which was accounted for by small enterprises (with less than 50 persons employed). Small enterprises accounted also for more than 61% of the value-added generated by the manufacture of leather products (division 19) in the EU.

Thus, small enterprises seem particularly important in the textile industry, all the more as Italy, which was the biggest producer in the EU textile industry, was the Member State that reported the highest prevalence of small enterprises. Indeed, more than half of its value-added was generated by enterprises employing less than 50 persons in 2001 (Graph 6).

Graph 6: Value-added by size of enterprise in textiles and clothing (NACE divisions 17 and 18) and leather and footwear (NACE division 19) in Member States, 2001



A relatively low qualified workforce with mainly women

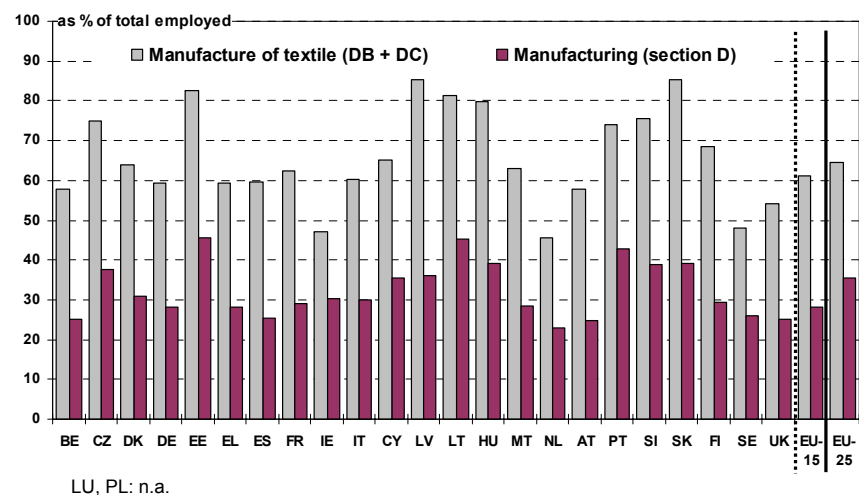
The labour force characteristics of the textile sector do not conform to the patterns observed for most manufacturing sectors. According to the EU Labour Force Survey (LFS) more than 64% of those employed in the textile industry in the EU were women in 2002.

Indeed, women made up the majority of the workforce in every Member State in 2002, except in Ireland, the Netherlands and Sweden (Graph 7). The share of women in the total number of persons employed in the textile industry was almost twice higher than the share in manufacturing.

Given that the majority of the workforce were usually women, it is perhaps unsurprising to find that there was also a higher propensity to engage in part-time work.

Some 9% of those employed in the EU's textile sector worked part-time in 2002, compared to a manufacturing average of 7%.

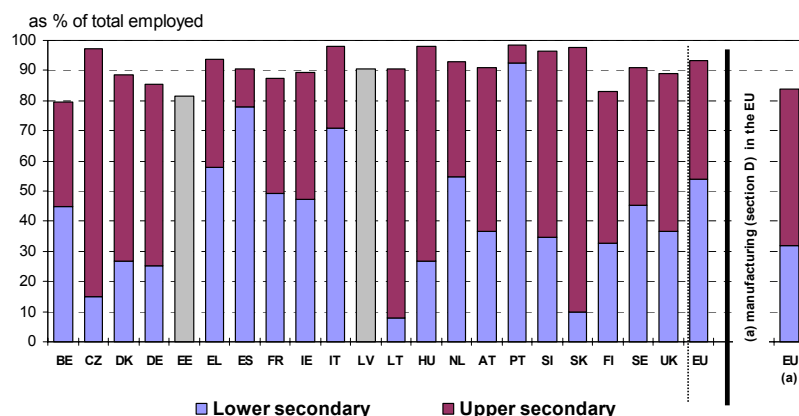
Graph 7: Women employed in textile industry in Member States, 2002



The workforce in textile industry is less skilled than in manufacturing as a whole, measuring skills in terms of educational attainment. 53% of the total employed in textile sector in 2002 in the EU had lower secondary educational attainment level and just fewer than 39% had upper secondary level educational qualifications, so that only 7% had tertiary (or university degree) level qualifications. By contrast, in total manufacturing, 32% of those employed had only lower secondary and 52% upper secondary education, leaving 16% with tertiary level. The distribution of textile sector's workforce according to the educational attainment varies greatly across the Union. The share of total employed in the textile sector with only lower secondary was the most important in Portugal (92%) and Spain (78%), and the least important in Slovakia (10%), Lithuania (8%).

Nevertheless, the share of the workforce with tertiary level in this sector is lower than 15% in all Member States, except in Belgium, Estonia and Finland (Graph 8).

Graph 8: Employment by education attainment level in textile industry in Member States, 2002



PL: n.a.; LU, CY, MT: data not published, due to small sample size.
EE, LV: division between basic schooling and upper secondary not available.

An increasing trade deficit

Textile products are an important part of the international trade. It is difficult to relate data on trade directly to SBS data, mainly because the enterprises responsible for exports and imports are not all included among the enterprises manufacturing textile products. Nevertheless, an indication of the importance can be gained by relating textile exports and imports to total textile trade flows.

In 2002, most of the Member States registered either a trade deficit or a low trade surplus in the textile sector. Only Italy, Portugal and Belgium registered a sizeable plus which amounted to more than 10% of total trade in this sector (Table 3).

The EU-15 has traditionally run a trade deficit in textile products (Classification of Products by Activity (CPA), subsections DB and DC). The EU-15's deficit remained fairly constant during the first half of the 1990s, at between EUR 15 billion and EUR 20 billion.

However, it deteriorated beyond the level of EUR 20 billion in 1997 and widened still further in successive years through to 2002 when it stood at EUR 32.6 billion.

China, Turkey, India, Tunisia and Romania together supplied more than 46% of imports to EU-15 in 2002. Though Romania was the smaller supplier of these five countries in 1997, it was China the country that increased more its exports to EU-15 between 1997 and 2002 (Graph 9).

Graph 9 : Origin of extra-EU-15 imports of textile products, 1997 and 2002

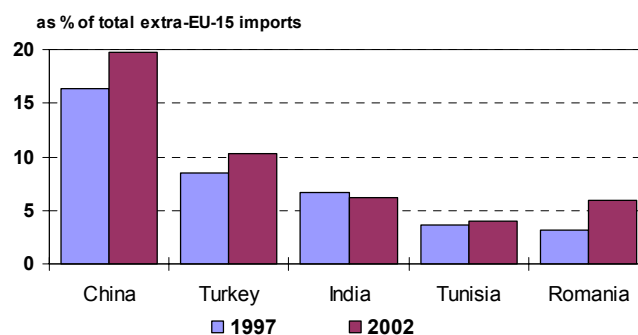


Table 3: Trade performance of textile industry in the Member States, 2002

Textile industry (DB+DC); exports-imports as % of exports+imports													
BE	CZ	DK	DE	EE	EL	ES	FR	IE	IT	CY	LV	LT	
11.9	-8.5	-10.0	-23.1	5.2	-14.6	-6.7	-19.7	-50.9	35.5	-80.3	-15.6	4.5	
LU	HU	MT	NL	AT	PL	PT	SI	SK	FI	SE	UK	EU	
2.4	-19.0	6.2	-11.7	-17.8	-36.3	27.4	-28.5	-29.3	-43.6	-37.2	-50.2	-28.1	

Notes: Member States: intra- and extra-EU trade, EU aggregate: extra-EU trade.

➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

ABBREVIATIONS

EU: European Union - including the 25 Member States (BE, CZ, DK, DE, EE, EL, ES, FR, IE, IT, CY, LV, LT, LU, HU, MT, NL, AT, PL, PT, SI, SK, FI, SE, UK).

SYMBOLS

“.” not available or confidential.

DEFINITIONS

Total business economy covers NACE Rev.1 sections C to K excluding J in this publication - which is the basic scope of the Structural Business Statistics (SBS).

Division of employment and value-added by sector of activity

Employment and value-added in the Structural Business Statistics (SBS) are divided into sectors of activity according to the NACE Rev. 1 system of classification. These categories activities are broken down by section (1-letter codes), subsection (2-letter codes), division (2-digit codes), groups (3-digit codes) and classes (4-digit codes). All manufacturing activities are included under section D. The textile industry analysed in this publication includes the following subsections, divisions and groups:

- DB Manufacturing of textiles and textile products;
 - 17 Manufacture of textiles;
 - 17.1 Preparation and spinning of textile fibres;
 - 17.2 Textile weaving;
 - 17.3 Finishing of textiles;
 - 17.4 Manufacture of made-up textile articles, except apparel;
 - 17.5 Manufacture of other textiles;
 - 17.6 Manufacture of knitted and crocheted fabrics;
 - 17.7 Manufacture of knitted and crocheted articles;
 - 18 Manufacture of wearing apparel; dressing and dyeing of fur;
 - 18.1 Manufacture of leather clothes;
 - 18.2 Manufacture of other wearing apparel and accessories;
 - 18.3 Dressing and dyeing of fur; manufacture of articles of fur;
- DC Manufacturing of leather products;
 - 19 Tanning and dressing of leather; manufacture of luggage, handbags, saddlery, harness and footwear;
 - 19.1 Tanning and dressing of leather;
 - 19.2 Manufacture of luggage, handbags and the like, saddlery and harness;
 - 19.3 Manufacture of footwear.

Number of persons employed: defined as the total number of persons who work in the observation unit (inclusive of working proprietors and partners working regularly in the unit and unpaid family workers), as well as persons who work outside the unit who belong to it and are paid by it (e.g. sales representatives, delivery personnel, repair and maintenance teams). It includes part-time workers, seasonal workers, apprentices and home workers who are on the pay roll. The observation unit for aggregating data is the enterprise, which is defined as *‘the smallest combination of legal units that is an organisational unit producing goods or services, which benefits from a certain degree of autonomy in decision-making, especially for the allocation of its current resources’*.

Value-added: Value-added measured at factor cost, which is the gross income from operating activities after adjusting for operating subsidies and indirect taxes (including value-added tax).

Degree of specialisation: The most specialised Member State is the country for which the share of total manufacturing value-added accounted for by textile industry is highest in relation to the average share in the EU. The least specialised Member State is the country where this ratio is the lowest. Seen that Because of uncertain data for Ireland, this country has been excluded from the ranking.

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.

Personnel costs: The total remuneration, in cash or in kind, payable by an employer to an employee (regular and temporary employees as well as home workers) in return from work done by the latter during the reference period.

Apparent labour productivity: Value-added at factor cost/number of persons employed (expressed in thousand EUR per person employed).

Average personnel costs: Personnel costs/number of employees (expressed in thousand EUR per employee).

DATA SOURCES

Structural Business Statistics (SBS): collected within the framework of Council Regulation on Structural Business Statistics (EC, EURATOM) No. 58/97 of December 1996. The SBS Regulation governs the transmission of data to Eurostat from the reference year 1995 onwards and, in principle, covers all market activities in sections C to K and M to O of NACE Rev. 1, but, in practice, the data available are confined to NACE Rev. 1 sections C to K, excluding section J, financial services. For further information, visit: http://forum.europa.eu.int/Public/irc/dsis/bmethods/info/data/new/main_en.html
The SBS data used in the analysis are taken from the ENTERPRIENTER_MA and ENTERPRIPRELI series which cover all enterprises from 1995 onwards (though the data are less complete and less accurate for the years before 1999) (theme 4/SBS). Data for Greece cover only enterprises with 20 persons or more employed and are, therefore, not included in these series. They are nevertheless available in the series ENTERPRIENT_L. The data used for the value-added by size of enterprise are taken from the SIZCLASS\INDUS. Data for Hungary cover only enterprises with 5 persons or more employed.

EU Labour Force Survey (LFS): a survey of private households which provides data on the population living in these by nationality and by work status as well as by sex and age. The main focus is on employment, unemployment and inactivity and the various aspects of these, including the sector of activity in which people are employed and the highest level of educational attainment reached.

Educational attainment levels: Educational attainment levels are based on the International Standard Classification of Education (ISCED), as revised in 1997. This divides education into 7 main levels, grouped into three levels in the analysis: (a) *lower secondary*, defined as ISCED levels 0 to 2, pre-primary, primary and lower secondary education; (b) *upper secondary*, defined as ISCED levels 3 and 4, upper secondary and post-secondary, non-tertiary education and (c) *tertiary*, defined as ISCED levels 5 and 6, first stage of tertiary education and second stage of tertiary education.

COMEXT: Eurostat's reference database on external trade statistics. Data for Member States on exports and imports include both intra-EU trade and extra-EU trade and are broken down by detailed product group, which in the analysis have been aggregated to correspond as closely as possible with textile.

Further information:

➤ Databases

NewCronos, Theme 4, Domain: sbs; LFS; COMEXT

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In collaboration with Nassima Hamzaoui and Maria Gonzalez.

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