



# Statistics in focus

## GENERAL STATISTICS

THEME 1 – 05/2003

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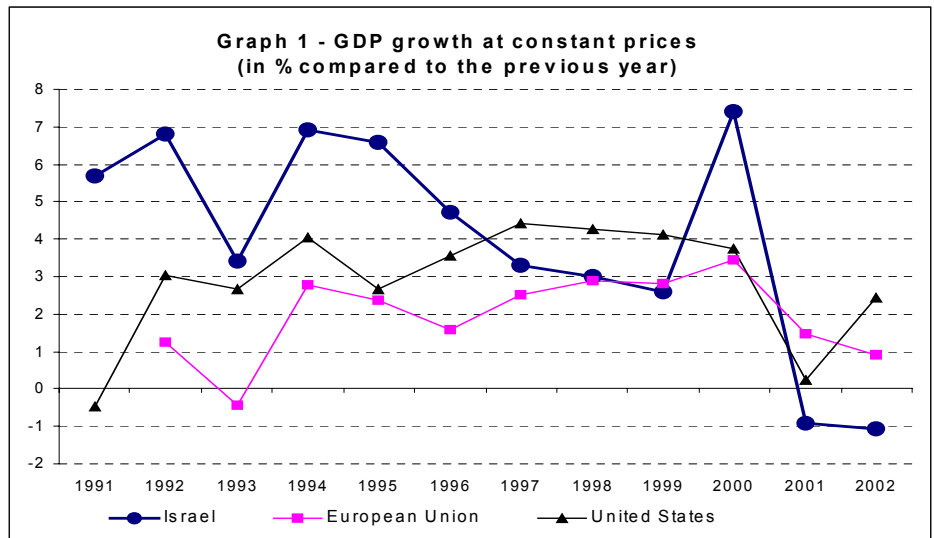
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# The Israeli economy and the European Union

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*The Israeli economy is the second largest economy among the Mediterranean partner countries<sup>1</sup>. It is characterised by relatively high growth, although growth did fall annually between 1994 and 1999 before being exceptionally high in 2000. Since 2001, with the onset of the second intifada (started in 2000) and the deterioration of the international economic situation, the country has been in recession. Inflation fell sharply in 2000 and 2001 before rising again in 2002, and unemployment now exceeds 10%.*

*Israel is an open economy which is fully integrated in the global trading system. It is among the MPC-12<sup>1</sup> economies attracting the highest number of international investors, mainly American. Israeli companies, unlike companies from most other MPCs, invest in the EU, and more assets are held by Israeli companies in Europe than by European companies in Israel. The EU is Israel's main trading partner, ahead of the United States. Israel mainly trades in precious stones (diamonds) and high technology goods.*



### The second largest MPC economy

With about 6.5 million inhabitants, the Israeli population is slightly smaller than that of Austria (8.1 million) and slightly larger than that of Jordan (5.2 million). Among the MPC-12, it is the second largest economy in terms of GDP, behind Turkey but ahead of Egypt. Israel's GDP was EUR 125 billion in 2001, slightly higher than the production of Portugal.

<sup>1</sup> **MPC-12:** Algeria, Morocco, Tunisia, Egypt, Jordan, Lebanon, Syria, Israel, Palestinian Authority, Cyprus, Malta and Turkey. Israel, along with the other eleven countries mentioned above, is involved in the regional Euro-Mediterranean statistical cooperation programme (MEDSTAT). This report was compiled as part of the MEDSTAT subprogramme entitled MED-IS (Information System), which is intended to strengthen the information and dissemination systems of the Mediterranean partners' national statistical institutes.

**Data source:** the figures on Israel presented here were transmitted to Eurostat within the framework of MEDSTAT by the Central Bureau of Statistics and/or the Israeli official national administrations and the figures on the EU and the United States are taken from Eurostat data bases (unless another source is indicated) (see methodological note p. 7).

## High growth in 2000 followed by recession

Growth in GDP at constant prices was generally high between 1992 and 1996. It even reached almost 7% in 1994 and 1995. It subsequently slowed annually before returning to a high level in 2000. That year Israel enjoyed favourable conditions: high investment, sustained consumption and growth in exports. In 2001, however, the turnaround in the high technology and electronics sector, the second intifada and the deterioration in the global economic situation pushed the country into recession.

Growth in household consumption slowed significantly in 2001. It even fell in 2002. All in all, expenditure on final household consumption nevertheless remained positive thanks to the sharp increase in public consumption (linked in part to security-related expenditure). During that same period, investments and foreign trade (mainly exports) fell sharply.

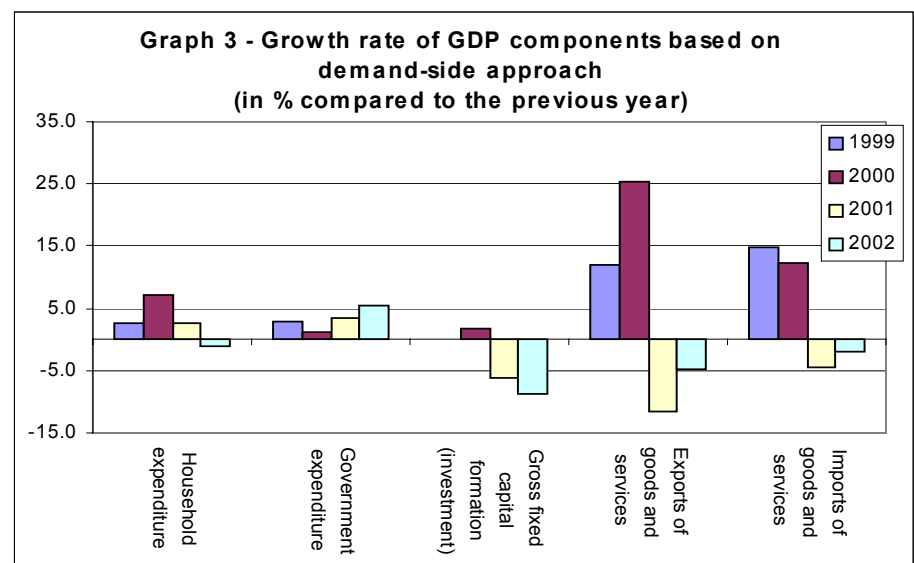
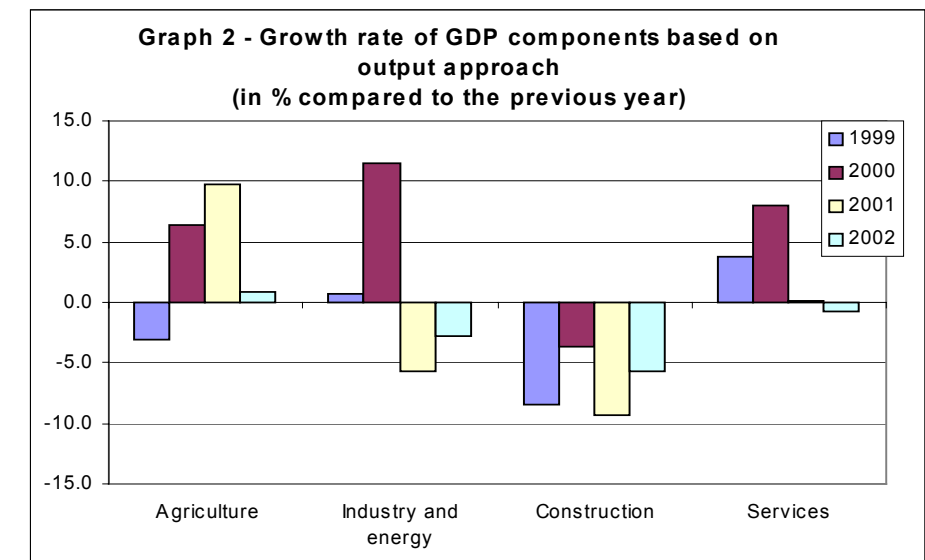
In 2002, all sectors except agriculture recorded a fall in production. The recession was particularly acute in the construction and industry sectors.

## High GDP per capita

At over EUR 19 000 in 2001, Israel's GDP per capita is the highest among the MPCs and is significantly higher than that of the poorest EU Member States. It is close to that of Italy. The World Bank has classified Israel as a high income country, alongside Cyprus and Malta or the countries of the EU.

## Structure of production

This high level of wealth, which is reflected in the structure of production, sets Israel apart from the majority of MPCs. In fact, the Israeli



**Table 1 - Total Israeli GDP**

	1995	1996	1997	1998	1999	2000	2001	2002
	In billions of Israeli Shekels							
GDP at current prices	271 283	315 225	354 919	390 712	426 840	464 436	470 152	485 658
	In billions of ECUs/euros							
GDP at current prices	68.9	77.8	90.7	91.7	96.7	123.2	124.7	108.4
	In thousands of ECUs/euros							
GDP per capita at current prices	12.4	13.7	15.6	15.4	15.8	19.6	19.4	16.5
	In % compared to the previous year (constant prices)							
GDP growth	6.6	4.7	3.3	3.0	2.6	7.4	-0.9	-1.1

**Table 2 - Structure of production in % of added value**

	1995	1996	1997	1998	1999	2000	2001	2002
- Agriculture	2.2	2.0	1.9	2.1	1.9	1.7	1.9	1.9
- Industry, energy	19.7	19.5	19.8	19.9	19.9	19.7	18.8	18.7
- Construction	7.7	7.8	7.6	6.8	6.0	5.3	4.8	4.8
- Total services	73.6	75.2	73.3	74.5	74.4	75.1	76.5	77.1

structure of production is very similar to that of the EU, characterised as it is by a dominant service sector and the limited part played by agriculture in the total value added. In the last

ten years or so, the economy has been redirected towards the service sector and the information and communications technologies industry (ICT).

Employment has increased dramatically in these areas and ICT exports accounted for approximately 30% of total Israeli exports in 2000 (compared to 14% in 1990).

### Structure of expenditure

Household expenditure accounted for approximately 57% of GDP in 2002, a figure close to the EU average and lower than that recorded by the majority of the other MPCs. Remaining expenditure was divided between investments (approximately 18% of GDP) and public expenditure (31%), a figure far exceeding the EU average (approximately 20%). Imports and exports accounted for approximately 37% and 47% of GDP respectively in 2002.

### Employment: rise in unemployment

The structure of employment by branch reflects the importance of the service sector. This sector alone accounted for over 75% of jobs in 2001, compared to 69% six years earlier.

Over the last years, the rate of unemployment has been generally increasing, from 7% in 1995 to 10% in 2002. Israel is experiencing rapid population growth (+2.2% in 2001) due to a high fertility rate (2.9 children per woman in 2001) and migration flows. With 28% aged under 15, Israel's population is relatively young. The entry of young people onto the labour market explains the increase in the active population: 3.8% between 1980 and 2000 compared to 0.7% in the EU. Young people are also most affected by unemployment. Youth unemployment reached 21% in 2002.

### Rising inflation

While illustrating the turnaround in the economic situation, the year 2000 also marked a turning point in the development of the public finance indicators, with public deficit

**Table 3 - Structure of expenditure in % of GDP**

	1995	1996	1997	1998	1999	2000	2001	2002
Final consumption expenditure	88.0	87.9	86.3	85.7	84.9	84.0	87.0	89.6
<i>Of which:</i>								
- household	57.6	57.0	56.0	55.9	55.2	55.0	56.4	56.9
- government	29.2	29.6	29.0	28.5	28.5	27.8	29.2	31.2
Investment (GFCF)	25.2	25.1	23.6	21.9	21.6	20.0	18.7	17.8
Exports of goods and services	30.6	29.8	30.4	31.6	36.0	40.6	35.5	36.6
Imports of goods and services	44.9	43.5	41.1	39.5	44.3	45.8	43.5	46.6

**Table 4 - Labour market**

	1995	1996	1997	1998	1999	2000	2001	2002
Total employment (in thousands)	1 965	2 013	2 040	2 073	2 137	2 221	2 265	2 284
	<b>In % of labour force</b>							
Unemployment rate	6,9	6,7	7,7	8,5	8,9	8,8	9,4	10,3
Youth unemployment rate	14,9	13,6	15,0	16,9	16,7	16,9	18,6	20,8
	<b>In % of total jobs</b>							
<b>Jobs by branch of activity</b>								
- Agriculture	2,9	2,5	2,4	2,3	2,3	2,2	1,9	2,0
- Industry	20,7	20,2	19,6	18,7	18,4	18,0	17,5	16,7
- Construction	7,2	7,5	7,2	6,4	5,7	5,3	5,2	5,2
- Services	69,2	69,8	70,8	72,6	73,6	74,5	75,4	76,1

**Table 5 - Finance**

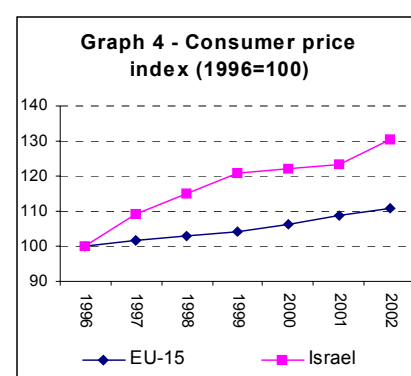
	1995	1996	1997	1998	1999	2000	2001	2002
<b>Public finance</b>	<b>In % of GDP</b>							
Government deficit/surplus	- 4.4	- 5.7	- 4.3	- 3.8	- 4.8	- 2.2	- 3.8	:
Public debt	120.5	119.0	112.9	115.5	108.2	99.0	104.0	:
<b>Financial indicators</b>	<b>Annual growth rate (%)</b>							
M1: Growth rate	16.4	22.5	8.7	14.5	15.4	- 3.0	20.0	:
Interest rate (1):	<b>In %</b>							
- long-term	4.3	4.6	4.1	5.1	5.6	6.0	4.9	4.8
- short-term	15.4	15.5	13.4	11.3	11.4	8.8	6.5	7.4
	<b>1 euro = ... shekels</b>							
ECU/euro exchange rate	3.937	4.051	3.912	4.260	4.412	3.768	3.771	4.482
<b>Financial markets</b>	<b>Millions of Israeli New Shekels</b>							
Banking transactions (2)	21,399	19,490	37,438	48,578	72,752	105,011	58,189	54,669
Market capitalisation (3)	114,447	115,273	163,810	170,156	271,279	269,210	261,559	199,326

(1) Long rate: return available on five-year index-linked bonds. Short rate: average return available on annual treasury bills between 1997 and 2001. Before 1997: monthly treasury bills. (2) Turnover, excluding selloffs and non-share stock market transactions. (3) Last month, end of period, share stock market.

and public debt reaching their lowest levels of the decade as a percentage of GDP. In 2001, however, the recession and the corresponding fall in tax revenue caused an increase in both the deficit and the public debt.

Since 2000, long-term interest rates have been falling. Inflation rose sharply in 2002 following a sharp fall in 2000 and 2001.

The exchange rate for the Shekel rose from 3.8 Shekels for 1 Euro in 2001 to 4.5 Shekel for 1 Euro in 2002, making Euro-denominated Israeli exports less expensive and imports more expensive.



Following significant rises since 1996, stock market capitalisation has been falling since 2000, as have banking transactions.

## Global exposure

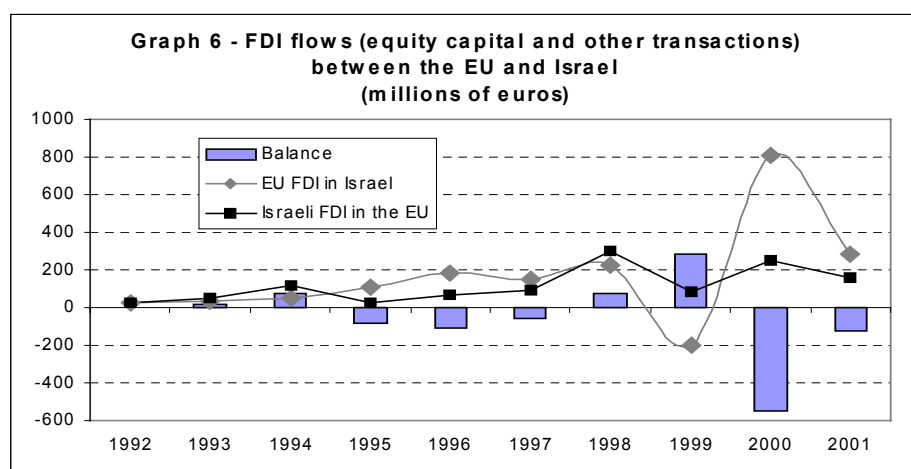
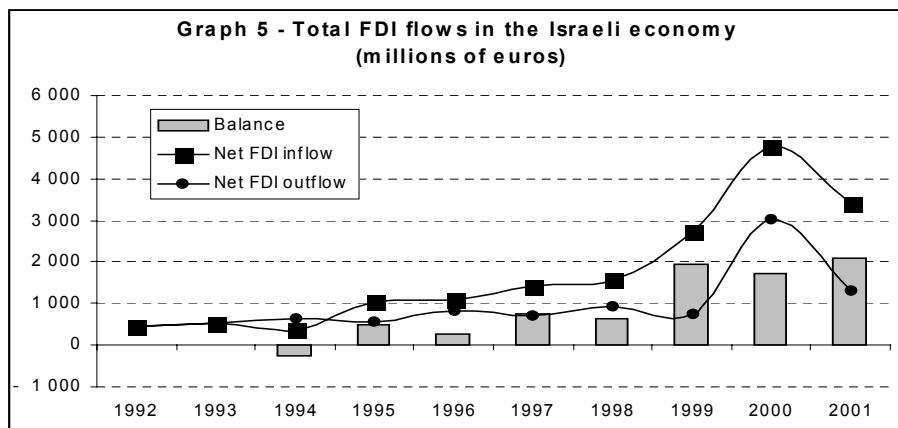
### Israel: a country attracting American and European investors

Foreign direct investment (FDI) inflows has risen sharply, in particular since 1994. This development is partly linked to privatisation and the expansion of high technology. In 2000, for example, FDI flows in the electronics and telecommunications sector accounted for approximately 62% of all FDI flows. FDI flows fell in 2001 due to the less favourable investment climate. According to UNCTAD, by attracting between 20% and 45% of all FDI flows to the MPC-12, Israel is the MPC more attracting for foreign investors.

European FDI flows to Israel have generally been rising since 1992, accounting for between 5% and 20% of European investments in the MPC-12. In spite of this, Israel is not among the most attractive Mediterranean countries for European investors. Only 7% of EU FDI reserves in the MPC-12 were located in Israel in 2000. This is four times less than in Turkey and 2.5 times less than in Egypt, the two other large economies in the region.

Israeli companies, unlike companies from most other MPCs, also invest in the EU. They even hold more assets in Europe than do European companies in Israel.

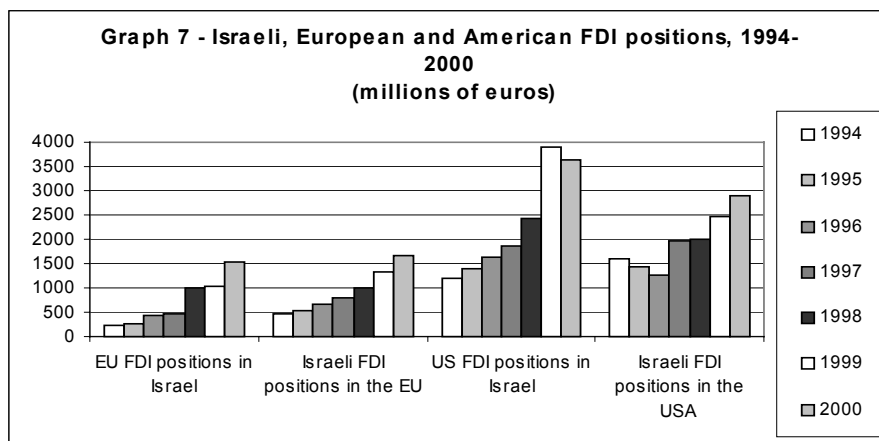
American investors are far more involved in Israel than European investors. FDI positions held by American investors in 2000 were approximately 2.4 times more significant than those held by Europeans. Israel is also the MPC attracting the most American FDI. Conversely, Israeli companies are far more active in the United States than in Europe.



**Table 6 - FDI flows\* and stock in Israel**

FDI flows from the EU				
towards:	1998	1999	2000	2001
Millions of euros				
MPCs**	2195	755	3649	2350
Of which Israel	225	-199	805	285
<i>In % of flows towards the MPC-1</i>	10.3	-26.4	22.1	12.1
FDI stocks in 2000:				
Millions of euros				
	Extra-EU	MPCs	Israel	In % of MPCs
<b>Total EU</b>	1517186	22936	1541	6.7
Netherlands	161993	3731	502	13.5
United Kingdom	442860	c	455	c
Germany	249647	3138	197	6.3
France	232815	3626	157	4.3
USA	737771	10734	3639	33.9

\*Equity capital and other transactions. \*\* MPC-12 excluding CY et MT before 2001. c: confidential.



## Current account

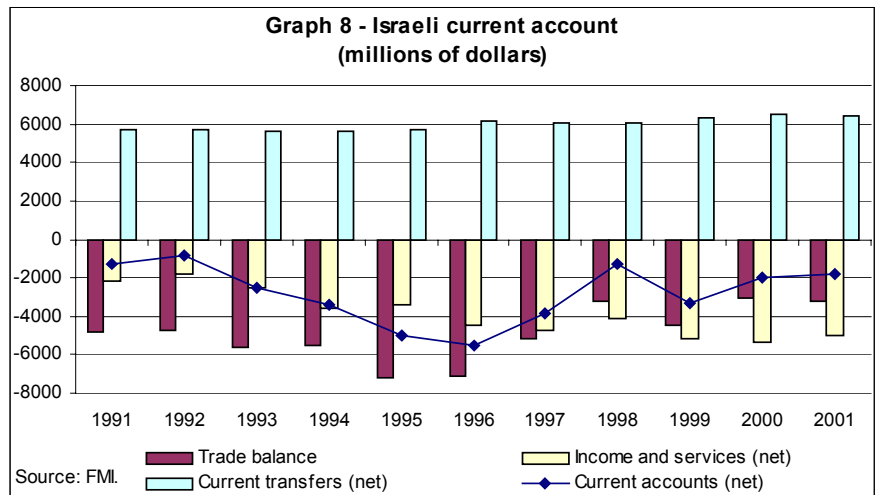
Israel traditionally runs a current account deficit vis-à-vis the rest of the world. This is due mainly to a negative trade balance and to an income balance deficit which is not cancelled out by the surplus from trade in services recorded some years. The current account deficit is generally limited thanks to large current transfers (two thirds of which were government transfers in 2001). The reduction in the current account deficit in 2001 was linked to the fall in trade in goods and services.

## Trade in services

A significant share of income from trade in services is generated by tourism activities (more than a quarter in 2000), although the share of income from this sector appears to have been diminishing since 1995. This foreign currency revenue is probably largely attributable to European tourists, who represented nearly half of all tourists visiting Israel in 2000. Transport and travel-related activities are the most traded services between the EU and Israel. While other MPCs generate foreign currency revenue through these activities, the opposite is the case for Israel. In fact, the EU records a surplus vis-à-vis Israel in these two sectors, evidence of the interest in Europe among Israeli tourists.

By contrast, in terms of business services Israel often records a surplus vis-à-vis the EU, particularly in the field of computer technology.

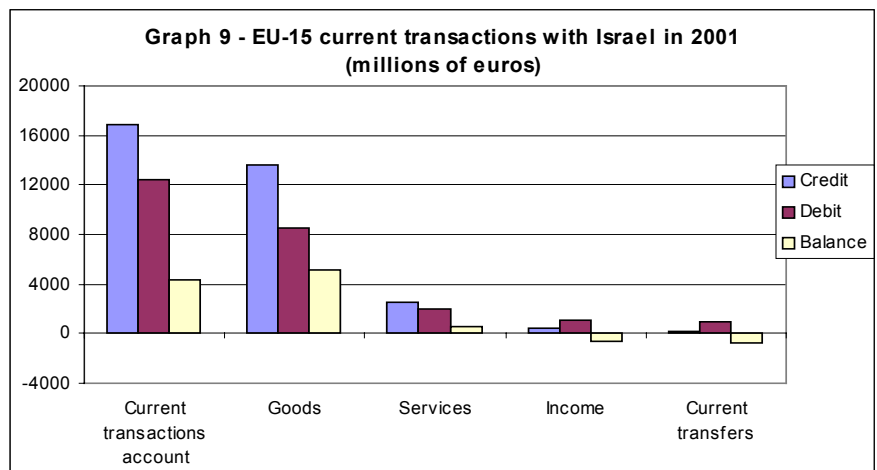
In general terms, the EU recorded a slightly positive services balance vis-à-vis Israel in 2001. However, trade in services represented only 17% of overall trade in goods and services. Trade in goods is thus by far the most significant activity between the EU and Israel.



**Table 7 - Tourism indicators**

Period	1995	1996	1997	1998	1999	2000	2001
<b>Balance of payments</b>							
Balance of payments - Travel - Credit-							
Annual variation in % (1)	21.5	-0.3	-2.7	-4.0	28.9	7.4	-43.3
Share of Travel item in the current account - credit in %	8.5	7.9	7.3	6.7	7.8	6.8	4.4
Share of Travel item in the balance of services - credit in %	38.2	37.1	34.4	30.1	32.6	26.6	19.1
<b>Nights spent by non-residents (2)</b>							
Total in thousands	9496	8908	8205	7709	9047	9676	3826
- of which Europeans in %	59.9	59.9	57.6	55.7	56.5	55.6	51.3
<b>Arrivals of tourists at the border</b>							
Total in thousands	2216	2100	2010	1942	2312	2417	1196
- of which from the EU in %	46.0	46.6	45.9	44.7	45.6	45.9	41.1

(1) Calculated on the basis of USD data. (2) Hotels classified as "tourist hotels" and hotels still to be classified.



**Table 8 - EU-15 trade in services with Israel in 2001**

	Exports	Imports	Balance	Exports	Imports
	millions of euros			in % of total	
Total services	2547	1952	595	100.0	100.0
<i>Of which:</i>					
Transportation	711	467	243	27.9	23.9
Travel	790	358	432	31.0	18.3
Communication services	66	98	-32	2.6	5.0
Buildings and public works services	42	48	-6	1.6	2.5
Insurance services	107	23	84	4.2	1.2
Financial services	63	14	49	2.5	0.7
Computer and information services	90	174	-84	3.5	8.9
Royalties and license fees	41	52	-11	1.6	2.7
Other business services	600	634	-34	23.6	32.5
Personal, cultural and recreational services	20	20	0	0.8	1.0
Government services, n.e.i.	17	60	-43	0.7	3.1
Services not allocated	1	1	0	0.0	0.1

## Falling trade in goods since 2001

Israel's trade with the EU rose steadily up to 1997 before slowing down in 1998. It then rose more sharply until 2000 before falling significantly in 2001 and 2002.

Israel's overall trade expanded by a factor of 2.7 between 1992 and 2002. It followed the same trend as EU-Israeli trade, albeit with a higher growth rate. The EU's share of Israeli trade would indeed appear to have fallen over the last decade.

## The EU: main partner

Having accounted for over one third of Israeli trade in 2000, the EU is nevertheless Israel's main trading partner in terms of overall trade (imports + exports). Five EU Member States (Belgium, Germany, Italy, the Netherlands and the United Kingdom) are among Israel's ten main trading partners. The United States is Israel's second most important partner. The EFTA countries, including Switzerland, and the countries of Asia are also important clients or suppliers.

It is worth noting that, since 1997, Israel's deficit vis-à-vis the EU has been larger than its overall deficit. In fact, Israel imports far more from the EU than it exports to it. Israel thus recorded a negative balance vis-à-vis the EU which is, however, partly offset by the surplus recorded vis-à-vis the United States.

## Diamonds and high technology goods

Israeli trade, both exports and imports, is made up mainly of manufactured goods (SITC groups 6 and 7). Two types of product stand out clearly: precious stones and high technology goods.

Israel is one of the main diamond traders in the world (along with Belgium, the United Kingdom, India and the United States). In 2000, trade in precious stones (SITC 667) accounted for around a quarter of Israeli trade and more than half of the goods in group 6. It has risen by a factor of 3.4 since 1990. Trade in this particular good also explains why Belgium and the United States are

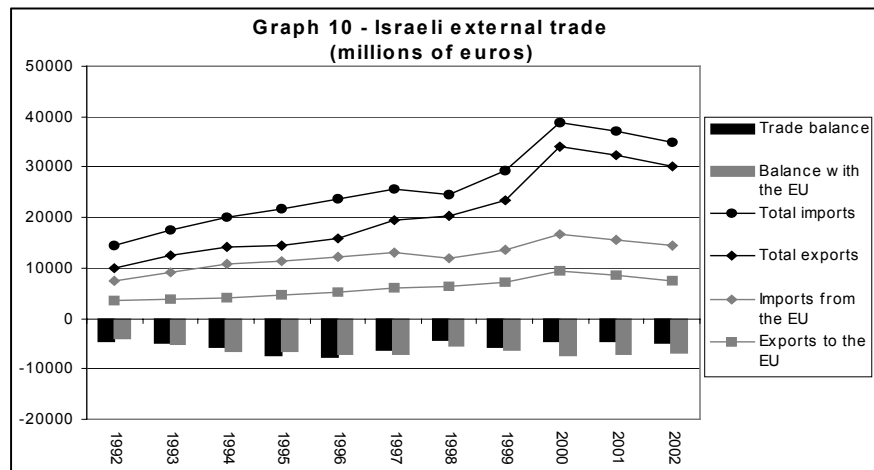
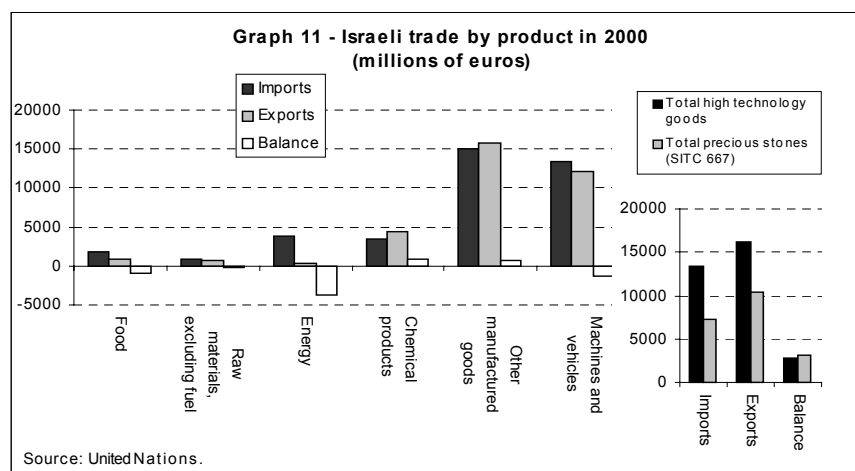


Table 9 - Israeli trade by main partners in 2000

Partners	Rank	millions of euros		Share in %		Balance
		Imports	Exports	Imports	Exports	
Total		38698	34005	100	100	-4693
EU		16741	9278	43	27	-7463
Belgium	2	3841	2028	10	6	-1813
Germany	4	2893	1647	7	5	-1246
United Kingdom	5	2936	1471	8	4	-1465
Italy	6	1863	869	5	3	-994
Netherlands	8	1555	973	4	3	-582
France	11	1253	816	3	2	-437
Spain	12	742	473	2	1	-269
USA	1	7190	12704	19	37	5514
EFTA		2160	595	6	2	-1565
Switzerland	7	2077	543	5	2	-1534
Asia		5593	6258	14	18	665
Hong-Kong	9	973	1498	3	4	526
Japan	10	1285	911	3	3	-373
India	13	579	603	1	2	24
Korea	14	704	429	2	1	-275
China	15	652	283	2	1	-369
13 Candidate countries		342	1165	1	3	470
Turkey	28	0	470	0	1	470
Other MPCs (excluding PS)	18	100	783	0	2	683

Source: United Nations.



Source: United Nations.

Israel's main trading partners.

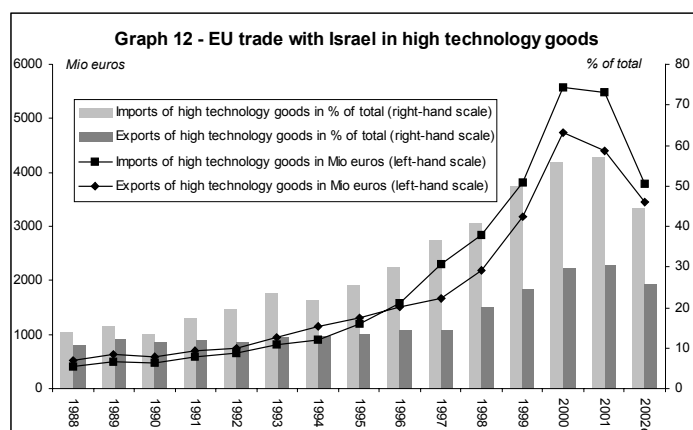
Israel's skilled labour force has enabled it to become an important producer of technological goods and

more recently to develop an industry based on the new information and telecommunications technologies.

As a result, overall trade in high technology goods accounted for approximately 40% of total Israeli trade in 2000.

Israeli-EU trade in high technology goods has grown significantly since 1995. So much so that high technology goods accounted for almost 60% of EU imports from Israel in 2001. In 1996, the EU went from a surplus to a deficit position for this type of goods, a deficit which kept growing until 2001. In 2001 and 2002, trade in this group of products fell sharply, which partly explains the general fall in Israeli-European trade these past two years.

Chemical products is the third group of traded products. Israel is a net importer of energy. The structure by product of the EU's trade with Israel closely resembles that of overall Israeli trade. The exception is energy, which accounts for a very small part of Israeli-European trade.



**Table 10 - Main products traded with the EU in 2002 (SITC 3)**

SITC	Imports	Exports	Balance	In % of total (Imp.+Exp.)
	millions of euros			
667 Pearls, precious stones	1688	2797	1109	23
764				
Telecommunications equipment	621	338	-282	5
781 Motor vehicles	3	648	646	3
542 Pharmaceutical products	417	100	-317	3
752 Automatic data processing machines, optical readers, etc.	148	331	183	2

**Table 11 - EU trade with Israel by product groups**

SITC	Product groups	in millions of euros								in % of total								Variations in %	
		1995	1996	1997	1998	1999	2000	2001	2002e	96	97	98	99	02	01	02	95/02	01/02	
<b>Imports</b>																			
0+1	Food	424	501	515	543	548	603	641	513	9	10	8	8	7	6	7	21	-20	
2+4	Raw materials, excluding fuel	298	346	362	380	317	397	354	309	6	7	6	6	4	4	4	3	-13	
3	Energy	38	33	78	102	85	201	168	8	1	1	1	2	1	2	2	-79	-95	
5	Chemical products	844	841	1074	1122	1252	1547	1672	1539	18	16	17	17	17	16	18	82	-8	
6+8	Other manufactured goods	1909	2266	2732	2843	3271	4003	3697	3336	41	43	44	42	44	41	39	75	-10	
7	Machines and vehicles	996	1153	1403	1741	1993	3008	2765	1989	21	22	23	26	26	31	29	100	-28	
9	Non-classified	144	85	59	48	53	52	112	100	3	2	1	1	1	1	1	-31	-11	
<b>Exports</b>																			
0+1	Food	399	422	509	479	444	521	585	530	4	4	5	4	4	3	4	33	-9	
2+4	Raw materials, excluding fuel	174	156	195	177	187	199	169	188	2	2	2	2	2	1	1	8	11	
3	Energy	42	64	47	39	111	318	131	7	0	1	0	0	1	2	1	-84	-95	
5	Chemical products	1144	1180	1355	1444	1528	1751	1798	1634	12	12	12	13	13	11	13	43	-9	
6+8	Other manufactured goods	4715	5042	5646	5115	5918	7055	5967	5256	49	49	50	48	48	46	43	11	-12	
7	Machines and vehicles	3008	3282	3485	3357	3909	5439	5263	4012	31	32	31	31	32	35	38	33	-24	
9	Non-classified	141	107	54	110	105	106	108	96	1	1	0	1	1	1	1	-32	-11	
<b>Trade balance</b>																			
0+1	Food	-26	-79	-6	-63	-105	-82	-56	18	-1	-2	0	-2	-2	-1	-1	-169	-131	
2+4	Raw materials, excluding fuel	-124	-190	-167	-203	-130	-198	-184	-121	-2	-4	-3	-5	-3	-4	-4	-3	-34	
3	Energy	4	31	-31	-63	26	117	-38	-1	0	1	-1	-2	1	2	-1	-140	-96	
5	Chemical products	301	339	280	322	276	204	125	95	6	7	6	8	6	4	3	-68	-24	
6+8	Other manufactured goods	2806	2776	2914	2271	2646	3052	2270	1920	56	55	58	58	57	55	49	-32	-15	
7	Machines and vehicles	2012	2129	2082	1616	1916	2431	2498	2023	40	42	41	41	41	44	54	1	-19	
9	Non-classified	-4	22	-5	62	52	54	-4	-5	0	0	0	2	1	1	0	25	4	

Source: Eurostat. Figures reported by the EU-15.

## ➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

The country aggregates:

EU: EU-15.

MPC-12: Algeria, Morocco, Tunisia, Egypt, Jordan, Lebanon, Syria, Israel, Gaza Strip and West Bank, Cyprus, Malta and Turkey.

Data sources: unless otherwise indicated, the data on Israel presented here were supplied by official national statistical sources in Israel. They were transmitted to Eurostat in connection with the MEDSTAT statistical cooperation programme. The data on the EU Member States and the United States are taken from Eurostat data bases (New Cronos and COMEXT).

National accounts: SNA 93. For the figures at constant prices, the base year is

1995.

Direct investments: table 6, graphs 6 and 7: figures published by the EU and the United States.

Graph 8: source IMF.

Balance of payments: table 9 and graph 9: figures published by the EU.

Trade in goods: graph 12, table 10, table 11: figures published by the EU. Table 8 and graph 11: source United-Nations.

Because of differences in methodology, data on bilateral trade published by the EU may differ from those published by Israel.

# Further information:

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