Statistics

in focus

INDUSTRY, TRADE AND SERVICES

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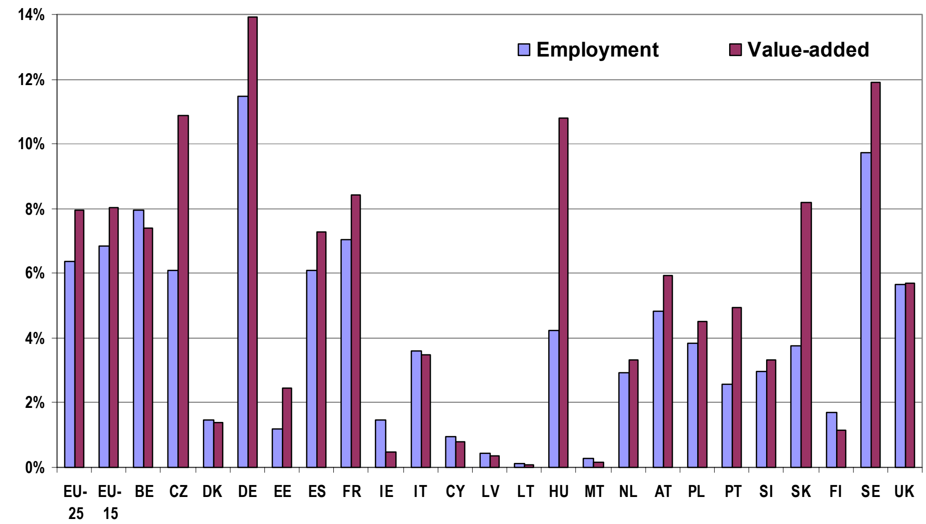
The motor vehicle industry in the European Union

The motor vehicle industry (NACE Rev.1, division 34) is made up of three groups: the manufacturing of motor vehicles (NACE 34.1), the manufacturing of vehicle bodies (coachwork), trailers and semi-trailers (NACE 34.2) and the manufacture of parts and accessories for motor vehicles (NACE 34.3).

The structure of the production methods in the car manufacturing industry is such that more and more pre-manufactured components (or modules) are being used in the assembly process; hence the importance of the enterprises belonging to NACE group 34.3, which goes far beyond the mere production of vehicle accessories.

According to Structural Business Statistics (SBS), the motor vehicle industry (NACE 34) accounts for over 6% of employment in the manufacturing industry and close to 8% to its total value-added at EU level.

Graph 1: Employment and value-added in the motor vehicle industry (NACE division 34) as a share of the manufacturing industry (NACE D) in 2001, by Member States



EL: no data available – LU: data only available for NACE 34.1 reported zero and not included in the graph – PL, SI : number of employees.
Source: Eurostat (SBS).

In general the motor vehicle sector is less labour intensive than the manufacturing sector as a whole. This reflects the possibility of mechanisation and of increasing the capital intensity of production in many parts of this industry.

Germany was the main contributor to the total value-added produced in the EU by motor vehicle industry in 2001. In relative terms, the degree of specialisation in value-added was highest in Germany, Sweden, the Czech Republic and Hungary.

A small group of countries does not have a noticeable motor vehicle industry. Its share is particularly low in Cyprus, Latvia, Lithuania, Malta and – to a lesser degree – in Denmark, Estonia and Finland.

Contents

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Table 1: Importance of the motor vehicle industry (NACE 34) in the EU, 2001

	Employment at EU level (in 1000)	Employment at EU level (share in %)	Value-added at EU level (in billion EUR)	Value-added at EU level (share in %)	Main contributor to value-added	Member State where the sector is: Most important*	Member State where the sector is: Least important*
Motor vehicles (NACE 34.1)	*1 137*	*53%*	*75.1*	*61%*	*DE*	*DE*	*CY, DK, LU*
Coachwork, trailers and semi-trailers (NACE 34.2)	*181*	*8%*	*6.9*	*6%*	*DE*	*BE*	*IE*
Accessories for motor vehicles (NACE 34.3)	*851*	*39%*	*39.9*	*33%*	*DE*	*CZ*	*MT*
Motor vehicles, trailers and semi-trailers (NACE 34)	**2 168**	**100%**	**121.8**	**100%**	**DE**	**DE**	**LT**
Transport equipment (NACE 34+ NACE 35)	3 011		168.6				
Share of motor vehicles ind. in transport equip. indust.	*72%*		*72%*				
Manufacturing industry (NACE D)	34 006		1 535				
Share of motor vehicles ind. in manufacturing industry	*6.4%*		*7.9%*				

** see Methodological Notes ('Degree of specialisation') – EL: no data available. – LU: data only available for NACE 34.1.* *Source: Eurostat (SBS).*

Turnover in the EU: 640 billion euro

In 2001, vehicle manufacturing (NACE 34.1) was the most important sector in the motor vehicle industry (NACE 34) (see Table 1): this group is responsible for 61% of value-added and 53% of employment.

In absolute terms, Germany was by far the most important contributor not only to the motor vehicle industry as a whole, but also for each of the three subgroups. When the size effect is disregarded (by considering the degree of specialisation) Germany lead the sector as a whole (NACE 34) and in the motor vehicle industry (NACE 34.1). Belgium came first for coachwork, trailers and semi-trailers (NACE 34.2), while the Czech Republic was the leader in the manufacture of parts and accessories for motor vehicles (NACE 34.3).

The importance of the motor vehicle industry (NACE 34) is again highlighted when looking its weight in the whole transport equipment industry (covering NACE 34 and 35), i.e. including the manufacturing of other transport equipment such as ships, boats, rail equipment, air- and spacecraft, cycles etc. Here, the motor vehicle industry accounted for 72% of value-added and employment.

Turnover in 2001 amounted to over EUR 640 billion and value-added to almost EUR 122 billion (see Table 2).

The EU-15 accounted for a 95.8% share of the EU's total turnover, proof of the importance of the motor vehicle industry in Western Europe.

Germany alone, at over EUR 57 billion, accounted for 47.1% of the value-added generated in the EU. The top five countries taken together (Germany, France, UK, Spain and Italy) were responsible for 84.1% of the EU's value-added in this industrial sector.

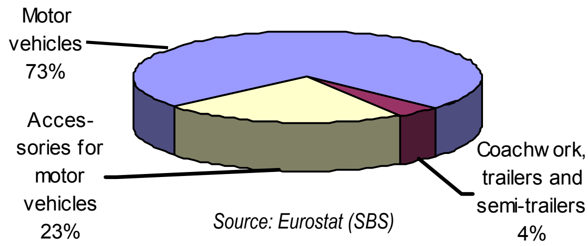
Table 2: Turnover, value-added and employment in the motor vehicle industry in the EU, 2001

Turnover - in million EUR	EU-25	EU-15	BE	CZ	DK	DE	EE	ES	FR	IE	IT	CY	LV
Motor vehicles (34.1)	475 943	457 677	15 727	:	0	197 866	:	36 312	100 735	47	30 947	0	:
% in Total motor vehicle and trailers industry	*74*	*74*	*81*	*:*	*0*	*75*	*:*	*74*	*79*	*10*	*64*	*0*	*:*
Coachwork, trailers and semi-trailers (34.2)	25 791	25 080	1 509	:	671	6 951	9	1 868	4 320	83	2 491	8	10
% in Total motor vehicle and trailers industry	*4*	*4*	*8*	*:*	*59*	*3*	*12*	*4*	*3*	*17*	*5*	*42*	*69*
Accessories for motor vehicles (34.3)	141 815	133 503	2 290	3 664	470	59 709	:	10 708	22 012	348	14 739	11	:
% in Total motor vehicle and trailers industry	*22*	*22*	*12*	*42*	*41*	*23*	*:*	*22*	*17*	*73*	*31*	*58*	*:*
Total motor vehicle and trailers industry	**643 550**	**616 260**	**19 526**	**8 784**	**1 142**	**264 525**	**75**	**48 888**	**127 067**	**478**	**48 177**	**18**	**14**
% in Total EU-25 motor vehicle and trailers industry	100	95.8	3.0	1.4	0.2	41.1	0.0	7.6	19.7	0.1	7.5	0.0	0.0
Value-added at factor cost - in million EUR													
Motor vehicles (34.1)	75 057	72 279	2 310	:	0	38 175	:	4 078	11 602	12	2 196	0	:
% in Total motor vehicle and trailers industry	*62*	*62*	*71*	*:*	*0*	*67*	*:*	*54*	*66*	*8*	*31*	*0*	*:*
Coachwork, trailers and semi-trailers (34.2)	6 879	6 711	353	:	173	1 854	2	442	1 106	22	688	3	4
% in Total motor vehicle and trailers industry	*6*	*6*	*11*	*:*	*49*	*3*	*9*	*6*	*6*	*15*	*10*	*43*	*66*
Accessories for motor vehicles (34.3)	39 876	37 509	609	815	178	17 300	:	3 058	4 757	116	4 174	4	:
% in Total motor vehicle and trailers industry	*33*	*32*	*19*	*50*	*51*	*30*	*:*	*40*	*27*	*77*	*59*	*57*	*:*
Total motor vehicle and trailers industry	**121 812**	**116 499**	**3 272**	**1 621**	**350**	**57 329**	**24**	**7 578**	**17 466**	**150**	**7 058**	**8**	**6**
% in Total EU-25 motor vehicle and trailers industry	100	95.6	2.7	1.3	0.3	47.1	0.0	6.2	14.3	0.1	5.8	0.0	0.0
Number of persons employed													
Motor vehicles (34.1)	1 137 200	1 055 200	36 179	:	0	526 656	:	80 347	156 214	221	69 915	0	:
% in Total motor vehicle and trailers industry	*52*	*54*	*67*	*:*	*0*	*61*	*:*	*50*	*55*	*6*	*40*	*0*	*:*
Coachwork, trailers and semi-trailers (34.2)	180 500	166 500	7 285	:	3 439	42 364	237	14 033	29 935	768	16 675	139	412
% in Total motor vehicle and trailers industry	*8*	*9*	*13*	*:*	*49*	*5*	*16*	*9*	*10*	*21*	*10*	*39*	*61*
Accessories for motor vehicles (34.3)	850 600	717 100	10 558	50 332	3 519	294 187	:	67 501	99 900	2 668	87 852	214	:
% in Total motor vehicle and trailers industry	*39*	*37*	*20*	*59*	*51*	*34*	*:*	*42*	*35*	*73*	*50*	*61*	*:*
Total motor vehicle and trailers industry	**2 168 400**	**1 938 700**	**54 022**	**84 862**	**6 958**	**863 207**	**1 471**	**161 881**	**286 049**	**3 657**	**174 442**	**353**	**671**
% in Total EU-25 motor vehicle and trailers industry	100	89.4	2.5	3.9	0.3	39.8	0.1	7.5	13.2	0.2	8.0	0.0	0.0

EL: no data available; LU: data only available for NACE 34.1 reported zero and not included in the table. *Source: Eurostat (SBS)*

At EU level, the production value breakdown into the three groups for 2001 was less balanced than for value-added and employment: almost three quarters of the entire division concerned the manufacture of motor vehicles (NACE 34.1), parts and accessories for motor vehicles (NACE 34.3) accounted for less than one quarter, while the manufacture of vehicle bodies and trailers (NACE 34.2) made up the remainder (see Graph 2).

Graph 2: Production value in the motor vehicle industry (NACE 34) in the EU, 2001 - share in%



Germany: 40% of EU employment

In 2001, more than 2 million persons were employed in the motor vehicle industry. More than half of these were employed in the manufacturing of cars, vans, lorries and special vehicles (NACE 34.1). Close to 40% worked in the manufacturing of parts and accessories for motor vehicles and their engines (NACE 34.3).

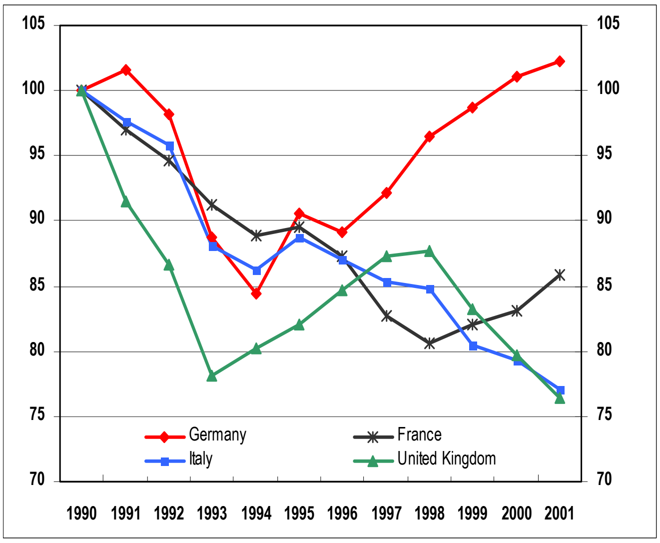
Germany recorded the largest share of the 2.2 million persons employed in the EU motor vehicle industry. The German share accounted for nearly 40%, far outstripping France (13%) and the United Kingdom (10%). Italy and Spain contributed respectively 8% each, followed by the Czech Republic and Sweden (both 4 %).
Of the new Member States, the Czech Republic and Poland had the highest shares in EU-25 employment at approximately 4% each.
But whereas employment in the manufacturing of vehicles (NACE 34.1) is often dominant (especially in Belgium, Germany and Sweden), it is the manufacture of parts and accessories (NACE 34.3) that represents the main source of employment in Hungary and the Czech Republic.
When considering simple wage adjusted labour productivity (value-added divided by personnel costs), four Member States showed values significantly above the EU average. Three of them, the Czech Republic, Latvia and Slovakia presented values between 1.6 and 2 times higher than the mean level.

Table 2: Turnover, value-added and employment in the motor vehicle industry in the EU, 2001 (continued)

Turnover - in million EUR	LT	HU	MT	NL	AT	PL*	PT	SI*	SK	FI	SE	UK	NO	BG
Motor vehicles (34.1)	:	4 629	:	5 499	5 521	5 575	3 656	999	:	435	16 889	43 855	60	5
% in Total motor vehicle and trailers industry	*:*	*72*	*:*	*69*	*63*	*68*	*73*	*71*	*:*	*43*	*81*	*70*	*7*	*15*
Coachwork, trailers and semi-trailers (34.2)	9	169	:	1 418	432	183	190	142	:	479	426	4 170	184	6
% in Total motor vehicle and trailers industry	*91*	*3*	*:*	*18*	*5*	*2*	*4*	*10*	*:*	*47*	*2*	*7*	*22*	*19*
Accessories for motor vehicles (34.3)	:	1 625	3	1 036	2 823	2 477	1 154	267	202	96	3 492	14 605	586	20
% in Total motor vehicle and trailers industry	*:*	*25*	*71*	*13*	*32*	*30*	*23*	*19*	*9*	*9*	*17*	*23*	*71*	*66*
Total motor vehicle and trailers industry	**10**	**6 423**	**4**	**7 953**	**8 776**	**8 236**	**4 999**	**1 408**	**2 319**	**1 009**	**20 807**	**62 631**	**830**	**30**
% in Total EU-25 motor vehicle and trailers industry	0.0	1.0	0.0	1.2	1.4	1.3	0.8	0.2	0.4	0.2	3.2	9.7		
Value-added at factor cost - in million EUR														
Motor vehicles (34.1)	:	650	:	1 133	1 223	1 038	537	55	:	153	3 823	6 979	35	1
% in Total motor vehicle and trailers industry	*:*	*56*	*:*	*63*	*58*	*51*	*61*	*41*	*:*	*44*	*77*	*53*	*11*	*14*
Coachwork, trailers and semi-trailers (34.2)	1	32	:	394	133	65	51	22	:	164	132	1 173	65	1
% in Total motor vehicle and trailers industry	*:*	*3*	*:*	*22*	*6*	*3*	*6*	*17*	*:*	*47*	*3*	*9*	*21*	*14*
Accessories for motor vehicles (34.3)	:	470	1	268	766	942	299	57	56	35	1 004	4 936	209	7
% in Total motor vehicle and trailers industry	*:*	*41*	*54*	*15*	*36*	*46*	*34*	*42*	*17*	*10*	*20*	*38*	*68*	*71*
Total motor vehicle and trailers industry	**1**	**1 152**	**1**	**1 795**	**2 123**	**2 045**	**887**	**134**	**321**	**351**	**4 959**	**13 087**	**309**	**10**
% in Total EU-25 motor vehicle and trailers industry	0.0	0.9	0.0	1.5	1.7	1.7	0.7	0.1	0.3	0.3	4.1	10.7		
Number of persons employed														
Motor vehicles (34.1)	:	10 020	:	12 333	16 260	28 883	8 967	2 637	:	2 935	50 691	93 167	379	813
% in Total motor vehicle and trailers industry	*:*	*27*	*:*	*45*	*54*	*35*	*38*	*37*	*:*	*39*	*65*	*42*	*7*	*23*
Coachwork, trailers and semi-trailers (34.2)	172	2 310	:	9 174	2 865	4 950	3 309	1 402	:	3 802	3 233	28 932	1 217	695
% in Total motor vehicle and trailers industry	*52*	*6*	*:*	*34*	*9*	*6*	*14*	*20*	*:*	*51*	*4*	*13*	*21*	*20*
Accessories for motor vehicles (34.3)	:	24 872	52	5 804	11 236	47 984	11 028	3 021	5 727	752	23 621	98 012	4 169	2 011
% in Total motor vehicle and trailers industry	*:*	*67*	*63*	*21*	*37*	*59*	*47*	*43*	*36*	*10*	*30*	*45*	*72*	*57*
Total motor vehicle and trailers industry	**329**	**37 202**	**83**	**27 311**	**30 360**	**81 817**	**23 304**	**7 060**	**15 783**	**7 489**	**77 545**	**220 111**	**5 765**	**3 519**
% in Total EU-25 motor vehicle and trailers industry	0.0	1.7	0.0	1.3	1.4	3.8	1.1	0.3	0.7	0.3	3.6	10.2		

** Employment: number of employees instead of number of persons employed.* *Source: Eurostat (SBS)*

Graph 3: Evolution of employment in the motor vehicle industry (NACE 34) — 1990=100



Enterprises with 20 or more persons employed.
Source: Eurostat (SBS).

When limited to the countries where the motor vehicle industry traditionally has a strong position (Germany, France, Italy and the United Kingdom — see Graph 3), figures show a reduction of the workforce active in this branch from 1990. The noticeable exception in this trend was Germany. This increase was largely due to the development of companies manufacturing parts and accessories for motor vehicles (NACE 34.3) in the new *Länder* (former East Germany).

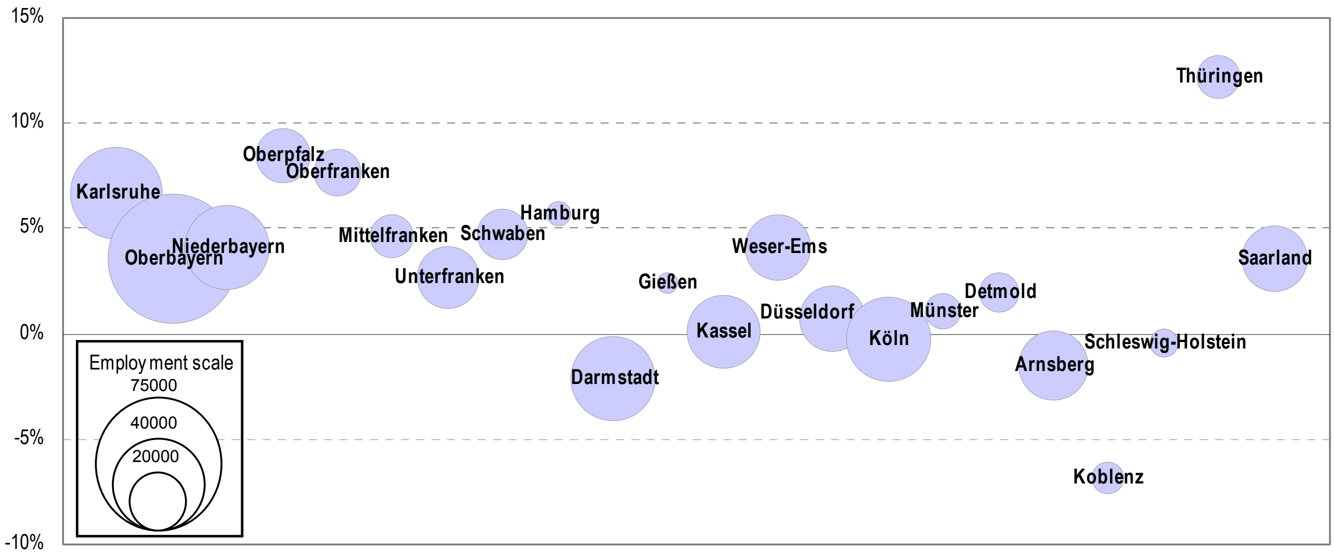
But employment in this branch also increased, albeit less markedly, in those German regions where the automotive industry is more traditionally based between 1995 and 2001, Bavaria (especially the sub-regions of Oberpfalz and Oberfranken) and Baden-Würtemberg (especially Karlsruhe) recorded an average annual increase of 4.1% and 3.7% respectively. The German sub-regions that, in absolute terms, offered the most jobs in the motor vehicle industry in 2001 were Oberbayern (74 259 jobs (2000)) Karlsruhe (39 940), Cologne (32 750), Darmstadt (32 709) and Niederbayern (32 328).
Graph 4 outlines the volume of employment in various German regions on one side (size of bubble), and the evolution of employment on the other (y-axis).

Employment in France experienced a general downward trend until 1998. From 1999 it showed a clear upward trend again, without, however, attaining the levels it had at the beginning of the 1990s.

On the other hand, employment declined by approximately a quarter compared to its 1990 level in Italy and the United Kingdom, both of which show a downward trend in total employment figures for a number of years. While Italy is experiencing a steady decline, the motor vehicle industry in the UK experienced a noticeable rebound during the 1993-1998 period.

In France, Italy and the United Kingdom all together, around 160 000 jobs have been lost between 1990 and 2001.

Graph 4: Average annual increase (1995-2001) of employment in the motor vehicle industry (NACE 34) for selected German regions, in %



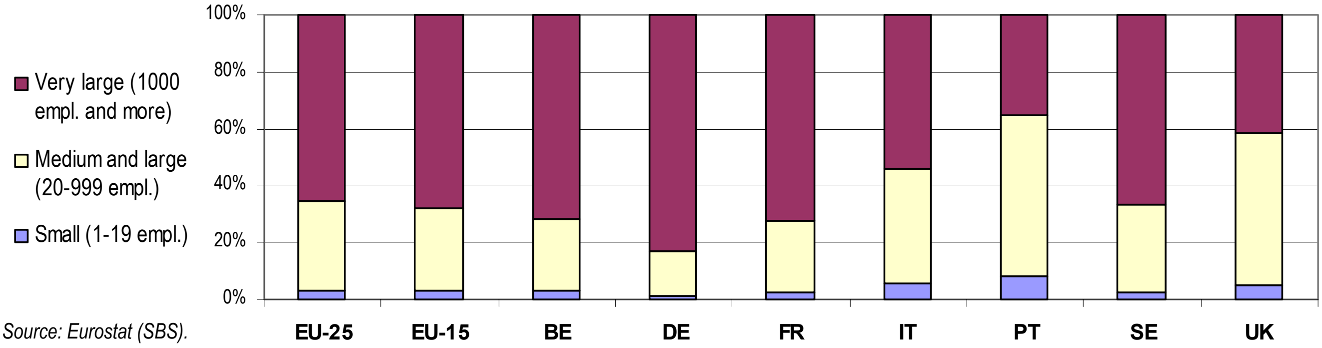
Source: Eurostat (SBS).

Very large enterprises dominate the sector

In 2001, in the EU, over 17 200 enterprises were registered in the motor vehicle sector. Most enterprises are registered in the parts and accessories sector (just below 50%), followed by the body and trailer industry (representing about 40%). The number of motor vehicle manufacturers was relatively few.

When all sub-sectors are taken together, Poland is the only new Member State to be over the threshold of 1000 enterprises. Among the countries where the motor vehicle industry is traditionally important, the United Kingdom registered almost 3000 enterprises, Germany, Italy, France and Spain followed with between 2000 and 2500.

Graph 5: Employment by size of enterprise in the motor vehicle industry (NACE 34), for selected EU Member States, 2001



Source: Eurostat (SBS).

At EU level, close to two-thirds of employment in the motor vehicle industry (NACE 34) were registered in very large enterprises (with 1000 persons employed or more) (see Graph 5). These are usually the production or assembly facilities of major car manufacturers or component suppliers. The share of such very large enterprises was over 80% in Germany.

Belgium, France and Sweden registered over 60% of the employment in the motor vehicle industry in very large enterprises whereas employment in medium and large-sized enterprises (20-999 persons employed) was most prevalent in Portugal and the United Kingdom.

At EU level, the apparent labour productivity of the manufacture of motor vehicles (NACE 34.1) was approximately 17% higher when compared to the entire sector (NACE 34). All but one country had a higher value; only Italy reported a productivity 22% below the corresponding value relative to the entire motor vehicle industry (see Graph 6).

With regard to this indicator, two countries excel: Hungary with +109% and Portugal, + 57 %.

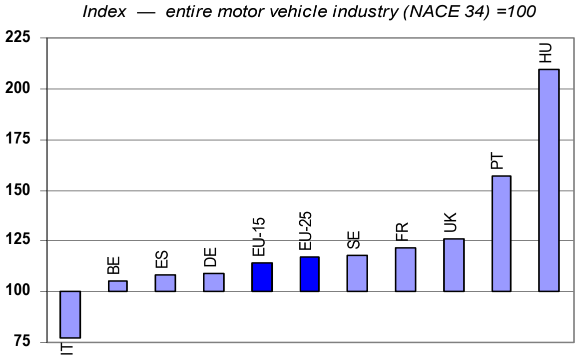
Whereas attractive wage rates may play a substantial role in the choice of location for operations, the availability of a skilled workforce is another factor, especially when companies are investing in the latest technology with regards to automation.

According to the EU Labour Force Survey data (LFS), nearly one in four people working in the EU motor vehicle industry in 2002 had completed lower secondary education (according to the ISCED classification, see Methodological Notes) while almost 55% had completed upper secondary education.

Amongst the countries with a significant motor vehicle industry, Italy and the United Kingdom deviated most from the EU average – albeit in different ways: in Italy, only about 40% of the total workforce had an upper secondary or higher level of education, whereas in the United Kingdom this share accounted for some 85%.

LFS showed that the motor vehicle industry remains a sector dominated by men. At EU level, the number of women employed is around 20%. A similar pattern was observed among all the countries with significant employment in this sector. Furthest off the EU average were Portugal and the Czech Republic where the share of female employment reached its peak with 38% and 34% respectively. Conversely, women constitute only 13% of the workforce in the United Kingdom.

Graph 6: Apparent labour productivity in the manufacturing of motor vehicles (NACE 34.1), for selected EU Member States, 2001



Source: Eurostat (SBS).

Trade surplus in the three sub groups

Trade performance of the motor vehicle industry in 2003 showed a high trade surplus. Seven of the twenty-five Member States recorded a positive balance. Germany and France were the only countries to register positive trade balances in all three sub-sectors, a characteristic that also applies to the EU as a whole.

Since its automotive industry is strongly export oriented (both with regard to vehicles and components), it comes as no surprise that Germany comes first in the group with a trade surplus of 31%. The Czech Republic and Sweden follow with a surplus of 21% each.

Among the new Member States, the Czech Republic and Hungary excel with a trade surplus of over 20% for the manufacturing of vehicles (NACE 34.1).

Table 3: Trade performance in the motor vehicle industry, by NACE group, 2003

exports-imports as % of exports+imports

	Manufacture of motor vehicles (NACE 34.1)	Manufacture of bodies for motor vehicles, trailers and semi-trailers (NACE 34.2)	Manufacture of parts and accessories for motor vehicles and their engines (NACE 34.3)	**MOTOR VEHICLE INDUSTRY (NACE 34)**
BE	**8.1**	-1.9	-21.2	**2.1**
CZ	**21.5**	-9.3	**21.4**	**20.8**
DK	-49.0	-15.4	**3.9**	-30.7
DE	**32.6**	**23.1**	**27.1**	**30.8**
EE	-92.1	-3.2	**4.3**	-62.0
EL	-96.1	-59.3	-74.0	-91.2
ES	**11.1**	-30.3	-19.9	**1.2**
FR	**15.3**	**0.1**	**8.2**	**13.0**
IE	-84.2	-47.9	-47.8	-78.5
IT	-41.2	**26.3**	**27.9**	-21.5
CY	-99.0	-99.5	-84.5	-97.2
LV	-94.5	-77.8	-83.9	-91.8
LT	-47.6	-62.5	-33.1	-47.4
LU	-47.5	-12.9	-24.4	-44.3
HU	**22.0**	-24.2	-26.7	**1.4**
MT	-99.0	-88.8	-68.3	-92.7
NL	-14.9	-40.1	-11.5	-15.6
AT	-7.2	-7.7	-6.2	-6.9
PL	-27.0	-26.0	**5.5**	-15.5
PT	-4.0	-45.9	-12.6	-6.9
SI	-91.7	-11.6	**38.4**	-53.7
SK	-90.8	-2.5	**6.8**	-54.2
FI	-48.1	-1.4	-28.5	-40.8
SE	**36.4**	**49.5**	-10.3	**20.8**
UK	-38.0	-21.3	-24.0	-33.9
EU-25	**19.0**	**61.1**	**37.2**	**25.7**

Member States: intra- and extra-EU trade; EU: extra-EU-25 trade.

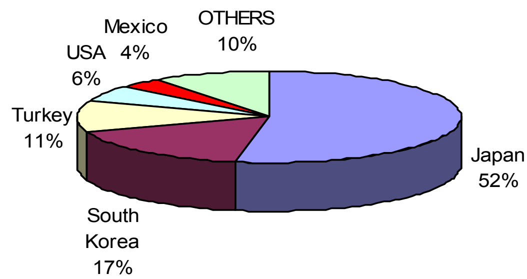
Source: Eurostat (Comext).

Concerning EU's trading partners, in terms of value, over half of all EU-imported motor vehicles in 2003 came from Japan (52%), while 17% came from South Korea (see Graph 7a). Turkey was the third largest contributor to imports.

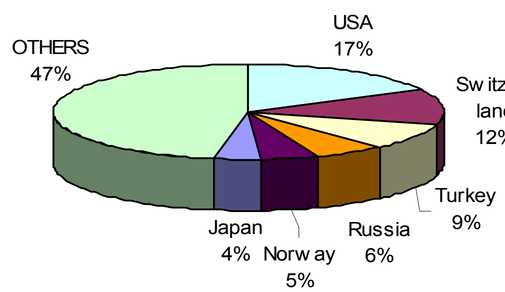
The United States were the most important export market in 2003; it received motor vehicles amounting to a 17% share in total value. Switzerland followed with an equivalent share of 12%. Turkey, Russia and Norway each accounted for between 5% and 9% (see Graph 7b).

Note that these shares relate to total volumes that are significantly different: whereas extra-EU vehicle imports represent a total value of EUR 21.3 billion, extra-EU vehicle exports total EUR 32.9 billion. Thus, EU imports from Japan represent over 7 times the value of EU exports to Japan.

Graph 7a: EXTRA-EU IMPORTS of cars, vans, lorries, special vehicles, 2003 – share by country, by value of products



Graph 7b: EXTRA-EU EXPORTS of cars, vans, lorries, special vehicles, 2003 – share by country, by value of products



Source: Eurostat (Comext).

➢ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

ABBREVIATIONS

EU: European Union, including the 25 Member States (EU-25): Belgium (BE), the Czech Republic (CZ), Denmark (DK), Germany (DE), Estonia (EE), Greece (EL), Spain (ES), France (FR), Ireland (IE), Italy (IT), Cyprus (CY), Latvia (LV), Lithuania (LT), Luxembourg (LU), Hungary (HU), Malta (MT), the Netherlands (NL), Austria (AT), Poland (PL), Portugal (PT), Slovenia (SI), Slovakia (SK), Finland (FI), Sweden (SE) and the United Kingdom (UK).

EU-15: European Union, including the 15 Member States (BE, DK, DE, EL, ES, FR, IE, IT, LU, NL, AT, PT, FI, SE, UK).

SYMBOLS

":" not available or confidential.

Total motor vehicle industry in this SiF covers NACE Rev.1 division 34.

DEFINITIONS

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. This categorises activity by section (1-letter codes), subsection (2-letter codes), division (2-digit codes), group (3-digit codes) and class (4-digit codes). All activities in the motor vehicle industry are included under NACE Section D. The motor vehicle industry analysed in this publication include the following divisions and groups:

DM 34	Manufacture of motor vehicles, trailers and semi-trailers	
	DM 34.1	Manufacture of motor vehicles
	DM 34.2	Manufacture of bodies (coachwork) for motor vehicles, manufacture of trailers and semi-trailers
	DM 34.3	Manufacture of parts, accessories for motor vehicles

Number of persons employed: defined as the total number of persons who work in the observation unit (inclusive of working proprietors, 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 payroll. 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*'.

Turnover: Turnover comprises the total amounts invoiced by the observation unit during the reference period, which corresponds to market sales of goods or services supplied to third parties.

Value-added: Value-added is 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 the value-added accounted for by the motor vehicle industry or a sector thereof is highest in relation to the manufacturing industry (NACE D) of that country. The least specialised Member State is the country where this share is the lowest.

Production value: Value of everything that was produced during the reference year. Part of this production is sold during the reference period, part of it is stocked to be sold later and part of it is 'capitalised' to be used for its own account. It also includes the gross margin on goods for resale.

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

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:

- lower secondary, defined as ISCED levels 0 to 2, pre-primary, primary and lower secondary education;
- upper secondary, defined as ISCED levels 3 and 4, upper secondary and post-secondary, non-tertiary education;
- tertiary, defined as ISCED levels 5 and 6, first stage of tertiary education and second stage of tertiary education.

The upper secondary level includes GCSE levels (General Certificate of Secondary Education) for the UK.

The data are taken from the EU LFS, which classifies those employed by NACE 2-digit industries.

DATA SOURCES

Structural Business Statistics (SBS): collected within the framework of Council Regulation (EC, EURATOM) No 58/97 of December 1996 on structural business statistics. The SBS Regulation governs the transmission of data to Eurostat from the reference year 1995 onwards and covers all market activities in sections C to K of NACE Rev. 1. The aggregate 'total business economy' is covered by NACE Rev. 1 sections C to K, excluding section J. 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 SBS database available free of charge on the ESTAT Web Site: http://europa.eu.int/comm/eurostat, which covers all enterprises from 1995 onwards (though the data are less complete and less accurate for the years prior to 1999).

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 education attained.

COMEXT is 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. In the analysis these have been aggregated to correspond as closely as possible to the motor vehicle industry.

Data extraction for this publication: August 2004.

Further information:

- **Databases**

  EUROSTAT Website/Industry, trade and services/Industry, trade and services - horizontal view/Structural Business Statistics (Industry, Construction, Trade and Services)/Annual enterprise statistics

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