

News Release

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INDUSTRY STATISTICS: OCTOBER - DECEMBER 2003

Commentary

Manufacturing Sales

In the October-December quarter 2003 total sales by the sampled manufacturing enterprises amounted to Lm262.2 million, an increase of Lm8.7 million or 3.4 per cent on the previous year.

In the period under review, the Radio, TV, Communications Equipment manufacturing sub-sector enhanced its sales performance by Lm4.2 million or 3.5 per cent to Lm125.7 million from Lm121.5 million in the previous year. Sales by the Chemicals and by the Other Transport Equipment sub-sectors went up by Lm2.5 million and Lm2.2 million respectively. Furthermore an increase in sales was also registered by the Food and Beverages and the Medical and Precision Equipment sub-sectors.

In the course of the fourth quarter last year, sales by the Textiles sub-sector went down by Lm1.8 million or 37.8 per cent to nearly Lm3 million from Lm4.8 million of the previous year. The Clothes sub-sector registered a decrease of Lm1.7 million or 11.2 percent as compared with the fourth quarter of 2002. At the same time, drops in sales were also registered by the Plastic and Rubber Products, the Leather and the Electrical Machinery sub-sectors.

Manufacturing Employment

As at the end of December 2003, employment in the sampled enterprises decreased by a net of 1,427, or 6.6 per cent, to 20,082 when compared to 21,509 as end of December 2002. Most of the drop was made by the Clothes sub-sector (839 employees) followed by the Textiles (256 employees), the Plastic and Rubber Products (238 employees) and the Leather (188 employees) sub-sectors.

An increase in employment was registered in the Printing and Publishing, the Food and Beverages, the Medical and Precision Equipment and the Other Transport Equipment sub-sectors.

In the period under review, an amount of around Lm30.4 million was paid out in wages and salaries by the sampled enterprises.

Investment

In the quarter under review, overall investment in manufacturing decreased by a net of Lm2.6 million or 28.3 per cent to Lm6.6 million when compared to Lm9.2 million for the fourth quarter of 2002.

The monthly calendar of NSO News Releases can be consulted on the Office's website at www.nso.gov.mt

**National Statistics Office
Library & Information Unit**
Lascaris, Valletta CMR 02, Malta
Tel: (+356) 21239225/25997219
Fax: (+356) 21249841
e-mail: nso@gov.mt
<http://www.nso.gov.mt>

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Table 1. Total Sales

Lm'000

| Sector | 2001 | | 2002 | | 2003 | |
|---------------------------------------|----------------|----------------|----------------|----------------|----------------|------------------|
| | Oct - Dec | Jan - Dec | Oct - Dec | Jan - Dec | Oct - Dec | Jan - Dec |
| 15 - Food and Beverages | 27,929 | 113,145 | 29,337 | 118,669 | 30,465 | 125,380 |
| 16 - Tobacco | 8,280 | 35,619 | 6,896 | 29,963 | 7,089 | 30,164 |
| 17 - Textiles | 2,808 | 9,982 | 4,814 | 17,623 | 2,995 | 15,491 |
| 18 - Clothes | 16,199 | 58,800 | 15,211 | 61,132 | 13,501 | 52,880 |
| 19 - Leather | 4,344 | 16,394 | 3,037 | 13,845 | 2,461 | 10,915 |
| 20 - Wood | 158 | 533 | 95 | 472 | 138 | 513 |
| 21 - Paper | 1,691 | 7,315 | 1,795 | 7,298 | 1,800 | 7,410 |
| 22 - Printing and Publishing | 9,144 | 33,016 | 12,411 | 42,827 | 12,297 | 48,837 |
| 23/24 - Chemicals | 8,594 | 34,727 | 8,578 | 34,866 | 11,120 | 37,193 |
| 25 - Plastic and Rubber Prods. | 9,363 | 38,047 | 9,620 | 39,466 | 9,042 | 38,005 |
| 26 - Other Non-Metallic Minerals | 3,978 | 13,329 | 3,156 | 13,827 | 3,707 | 13,991 |
| 27 - Basic Metals | 91 | 547 | 95 | 392 | 60 | 278 |
| 28 - Fabricated Metal Products | 4,235 | 14,039 | 4,252 | 15,891 | 4,021 | 15,678 |
| 29 - Machinery and Equipment | 2,451 | 13,043 | 2,425 | 10,808 | 3,380 | 13,221 |
| 30 - Office Machinery | 577 | 1,384 | 252 | 1,161 | 230 | 821 |
| 31 - Electrical Machinery | 11,487 | 44,811 | 10,255 | 40,481 | 9,819 | 38,059 |
| 32 - Radio, TV, Comm. Equipment, etc | 106,286 | 475,216 | 121,464 | 459,237 | 125,709 | 486,713 |
| 33 - Medical and Precision Equipment | 5,101 | 18,280 | 6,064 | 22,822 | 7,536 | 26,989 |
| 34 - Car Industry | 183 | 1,058 | 131 | 711 | 186 | 727 |
| 35 - Other Transport Equipment | 1,441 | 5,592 | 1,816 | 7,293 | 4,011 | 15,999 |
| 36 - Furniture & Manufacturing N.E.C. | 14,174 | 55,741 | 11,828 | 52,868 | 12,646 | 48,796 |
| Total | 238,514 | 990,615 | 253,534 | 991,652 | 262,212 | 1,028,060 |

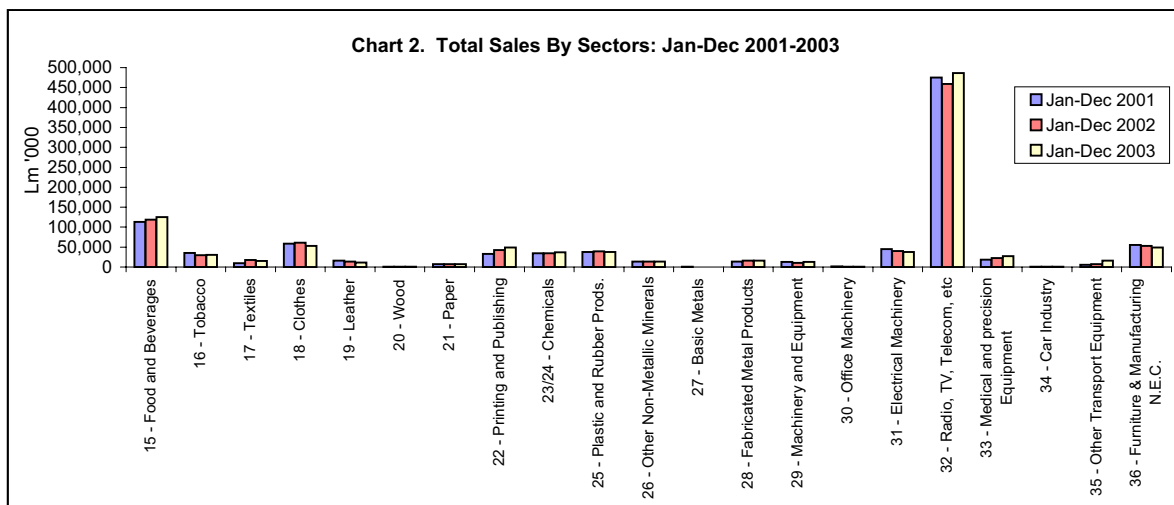
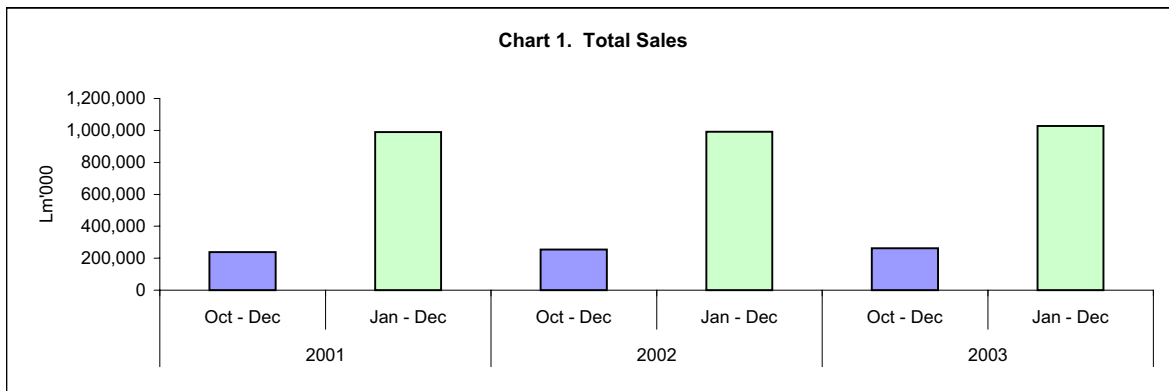


Table 2. Employment

| Sector | 2001 | | 2002 | | 2003 | |
|---------------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|
| | End of Sept. | End of Dec. | End of Sept. | End of Dec. | End of Sept. | End of Dec. |
| 15 - Food and Beverages | 3,282 | 3,141 | 3,183 | 3,024 | 3,206 | 3,088 |
| 16 - Tobacco | 153 | 152 | 149 | 149 | 160 | 159 |
| 17 - Textiles | 539 | 701 | 824 | 887 | 822 | 631 |
| 18 - Clothes | 3,324 | 3,339 | 2,934 | 2,818 | 2,004 | 1,979 |
| 19 - Leather | 852 | 812 | 681 | 642 | 463 | 454 |
| 20 - Wood | 49 | 47 | 44 | 46 | 48 | 48 |
| 21 - Paper | 318 | 314 | 311 | 312 | 288 | 286 |
| 22 - Printing and Publishing | 1,506 | 1,526 | 1,546 | 1,593 | 1,653 | 1,671 |
| 23/24 - Coke, Petroleum & Chemicals | 1,068 | 1,056 | 1,060 | 1,053 | 1,041 | 1,067 |
| 25 - Plastic and Rubber Prods. | 2,186 | 2,203 | 1,949 | 1,878 | 1,672 | 1,640 |
| 26 - Other Non-Metallic Minerals | 637 | 646 | 663 | 663 | 679 | 676 |
| 27 - Basic Metals | 61 | 57 | 56 | 56 | 47 | 48 |
| 28 - Fabricated Metal Products | 708 | 699 | 682 | 681 | 658 | 647 |
| 29 - Machinery and Equipment | 429 | 418 | 402 | 377 | 392 | 406 |
| 30 - Office Machinery | 22 | 23 | 19 | 19 | 19 | 19 |
| 31 - Electrical Machinery | 1,329 | 1,347 | 1,215 | 1,225 | 1,193 | 1,126 |
| 32 - Radio, TV, Comm. Equipment, etc | 3,068 | 3,000 | 3,170 | 3,180 | 3,247 | 3,198 |
| 33 - Medical and Precision Equipment | 1,054 | 1,045 | 991 | 950 | 990 | 1,010 |
| 34 - Car Industry | 65 | 53 | 56 | 47 | 52 | 50 |
| 35 - Other Transport Equipment | 166 | 166 | 162 | 159 | 221 | 214 |
| 36 - Furniture & Manufacturing N.E.C. | 1,769 | 1,754 | 1,797 | 1,750 | 1,719 | 1,665 |
| Total | 22,585 | 22,499 | 21,894 | 21,509 | 20,574 | 20,082 |

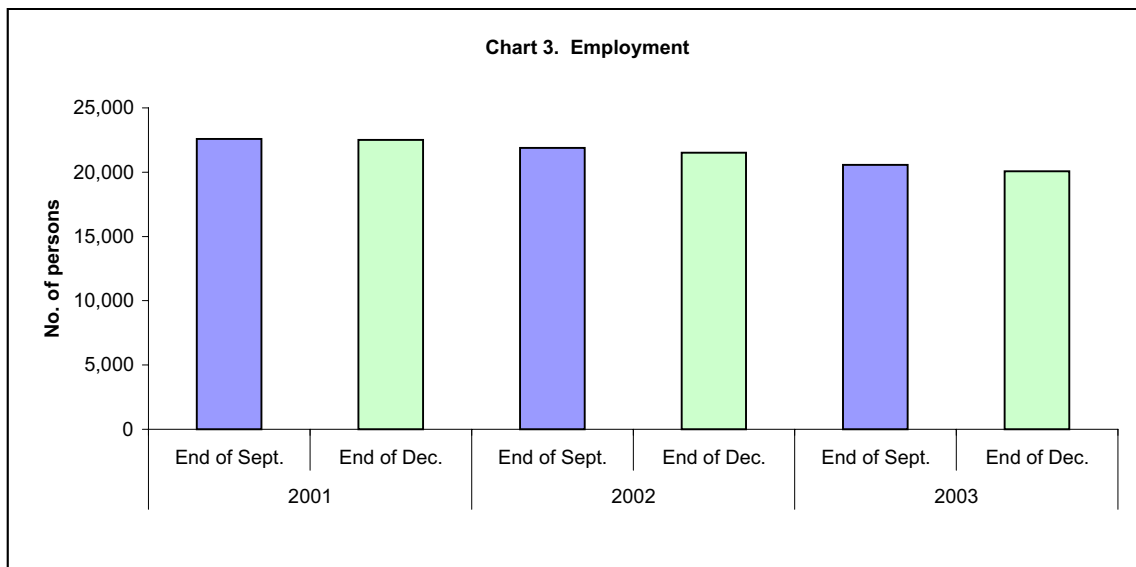


Table 3. Wages and Salaries

Lm'000

| Sector | 2001 | | 2002 | | 2003 | |
|---------------------------------------|---------------|----------------|---------------|----------------|---------------|----------------|
| | Oct - Dec | Jan - Dec | Oct - Dec | Jan - Dec | Oct - Dec | Jan - Dec |
| 15 - Food and Beverages | 4,011 | 15,567 | 4,097 | 16,125 | 4,294 | 17,280 |
| 16 - Tobacco | 316 | 1,414 | 263 | 1,080 | 298 | 1,205 |
| 17 - Textiles | 631 | 2,147 | 873 | 3,261 | 558 | 3,295 |
| 18 - Clothes | 3,538 | 14,160 | 3,073 | 13,229 | 2,316 | 10,129 |
| 19 - Leather | 814 | 3,484 | 622 | 2,804 | 512 | 2,366 |
| 20 - Wood | 42 | 168 | 41 | 160 | 42 | 164 |
| 21 - Paper | 417 | 1,703 | 456 | 1,712 | 452 | 1,776 |
| 22 - Printing and Publishing | 2,217 | 8,137 | 2,557 | 9,557 | 2,678 | 10,813 |
| 23/24 - Chemicals | 1,642 | 6,342 | 1,741 | 6,623 | 1,593 | 6,702 |
| 25 - Plastic and Rubber Prods. | 2,290 | 10,459 | 2,651 | 10,706 | 2,916 | 10,873 |
| 26 - Other Non-Metallic Minerals | 707 | 2,737 | 754 | 2,860 | 792 | 3,099 |
| 27 - Basic Metals | 75 | 319 | 75 | 296 | 65 | 266 |
| 28 - Fabricated Metal Products | 923 | 3,544 | 932 | 3,720 | 988 | 3,802 |
| 29 - Machinery and Equipment | 545 | 2,178 | 508 | 2,096 | 572 | 2,224 |
| 30 - Office Machinery | 28 | 109 | 25 | 102 | 24 | 90 |
| 31 - Electrical Machinery | 1,987 | 7,611 | 1,910 | 7,282 | 1,936 | 7,655 |
| 32 - Radio, TV, Comm. equipment, etc | 4,499 | 18,246 | 5,653 | 20,762 | 5,911 | 23,040 |
| 33 - Medical and Precision Equipment | 1,342 | 5,832 | 1,372 | 5,512 | 1,423 | 6,298 |
| 34 - Car Industry | 48 | 217 | 49 | 197 | 51 | 182 |
| 35 - Other Transport Equipment | 245 | 1,021 | 240 | 954 | 447 | 1,840 |
| 36 - Furniture & Manufacturing N.E.C. | 2,390 | 9,941 | 2,460 | 9,680 | 2,501 | 10,302 |
| Total | 28,704 | 115,337 | 30,353 | 118,718 | 30,368 | 123,402 |

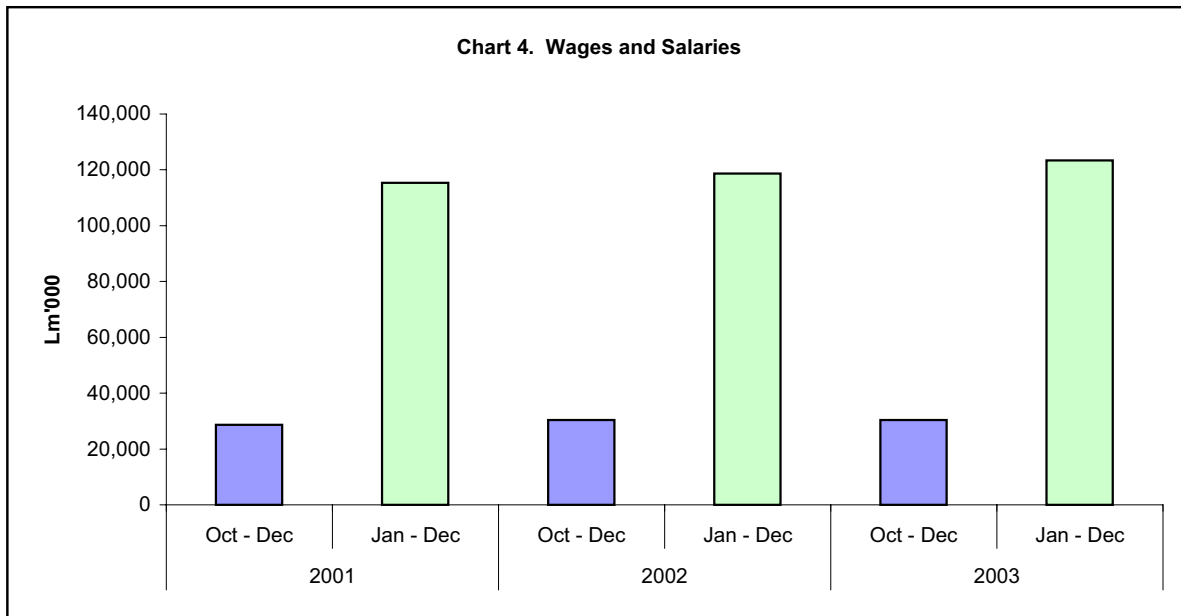
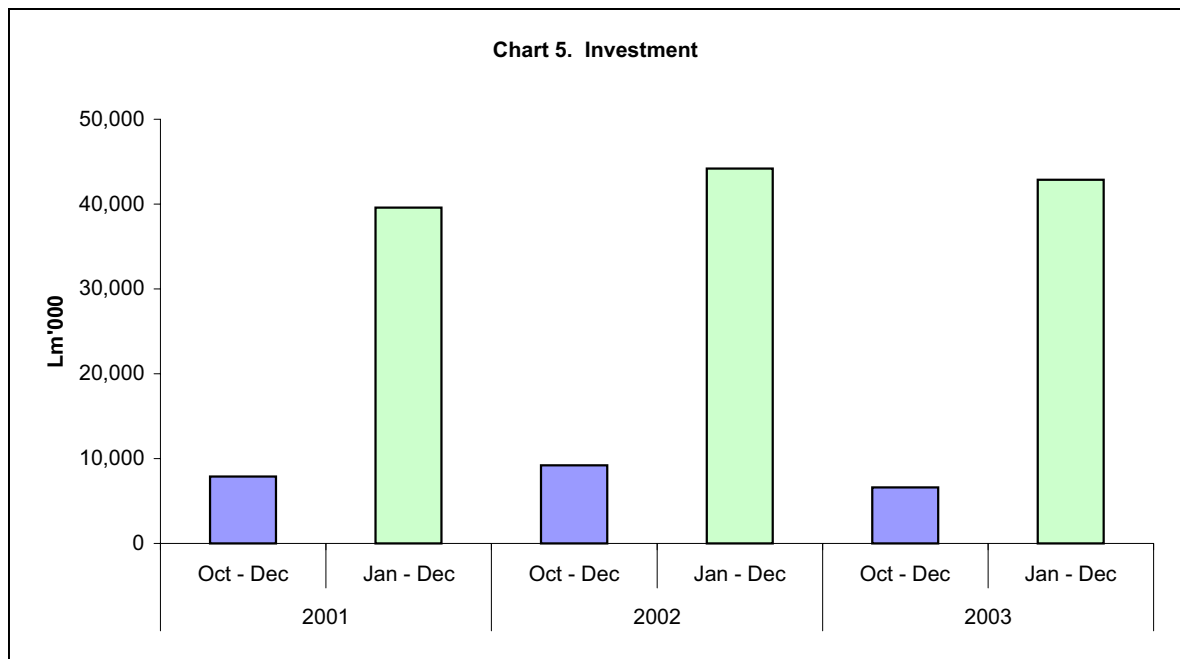


Table 4. Investment

Lm'000

| Sector | 2001 | | 2002 | | 2003 | |
|---------------------------------------|--------------|---------------|--------------|---------------|--------------|---------------|
| | Oct - Dec | Jan - Dec | Oct - Dec | Jan - Dec | Oct - Dec | Jan - Dec |
| 15 - Food and Beverages | 529 | 4,181 | 616 | 2,910 | 662 | 6,076 |
| 16 - Tobacco | 508 | 1,170 | 115 | 599 | 32 | 131 |
| 17 - Textiles | 369 | 827 | 480 | 1,918 | 0 | 306 |
| 18 - Clothes | 265 | 1,381 | 384 | 889 | 20 | 420 |
| 19 - Leather | 62 | 216 | 29 | 252 | 17 | 119 |
| 20 - Wood | 0 | 2 | 1 | 1 | 2 | 2 |
| 21 - Paper | 0 | 68 | 15 | 23 | 1 | 20 |
| 22 - Printing and Publishing | 248 | 770 | 398 | 3,639 | 400 | 2,871 |
| 23/24 - Chemicals | 517 | 1,973 | 1,955 | 5,840 | 393 | 3,808 |
| 25 - Plastic and Rubber Prods. | 308 | 2,801 | 451 | 2,754 | 131 | 2,401 |
| 26 - Other Non-Metallic Minerals | 33 | 222 | 92 | 409 | 41 | 336 |
| 27 - Basic Metals | 1 | 1 | 0 | 2 | 1 | 2 |
| 28 - Fabricated Metal Products | 177 | 351 | 209 | 365 | 88 | 439 |
| 29 - Machinery and Equipment | 42 | 284 | 10 | 257 | 2 | 381 |
| 30 - Office Machinery | 0 | 0 | 0 | 0 | 0 | 1 |
| 31 - Electrical Machinery | 857 | 2,807 | 642 | 1,956 | 394 | 1,843 |
| 32 - Radio, TV, Comm. equipment, etc | 3,219 | 19,075 | 2,350 | 17,507 | 3,165 | 17,522 |
| 33 - Medical and Precision Equipment | 490 | 2,253 | 203 | 806 | 328 | 690 |
| 34 - Car Industry | 3 | 19 | 0 | 7 | 0 | 0 |
| 35 - Other Transport Equipment | 78 | 101 | 2 | 27 | 95 | 712 |
| 36 - Furniture & Manufacturing N.E.C. | 170 | 1,077 | 1,267 | 4,011 | 814 | 4,783 |
| Total | 7,874 | 39,579 | 9,220 | 44,172 | 6,586 | 42,863 |



Methodological Notes:

1. This release is based on a sample survey of 451 enterprises across all sectors of the manufacturing sector. All enterprises are classified in accordance with NACE Rev.1.1 (Nomenclature des Activités Economiques dans les Communautés Européennes).
2. **Employment** is inclusive of all full-time and part-time employees and outworkers. With regards to Table 3: Employment, the total employment in manufacturing sectors refers to the end-of-month figures marking the end of every quarter, i.e., March, June, September and December.
3. **Gross wages and salaries** are inclusive of all basic wages and salaries payable at regular intervals, overtime, night shift and other allowances, bonuses and commissions. Employers' social security contributions are excluded.
4. **Total Sales** are made up of all local sales, which are exclusive of VAT and exports on an FOB basis.
5. **Investment** refers to new investment during the reference period. These are tangible capital goods for own company use but not for speculative use. They have a useful life of more than one year. Any additions, alterations, improvements or renovations prolonging the service life or to increase the productive capacity of capital goods are not taken into account. Excluded from the definition are current maintenance costs as well as investment in capital goods used under rental and lease contracts, intangible goods (patents, trade marks), financial assets and goods acquired through mergers. Computer software is regarded as investment if its life is over one year and if its amount is of a relatively considerable amount.
6. The data in this release should be considered as provisional.
7. More information on Industry Statistics is available from NSO website at www.nso.gov.mt