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Business

Manufacturing Performance in Malta: 2003-2005

Manufacturing Sales

Between 2003 and 2004 sales in manufacturing industry registered a decrease of Lm16.6 million or 1.6 per cent and a decrease of Lm58.2 million or 5.8 per cent between 2004 and 2005.

Between 2003 and 2004, increases in sales were registered mainly in the Textiles and textiles products subsector (Lm11.4 million), in the Medical, precision and optical instruments sub-sector (Lm8.5 million) and in the Electrical Machinery and apparatus (Lm7.5 million). In the same period, the Wearing Apparel and Clothes sub-sector registered a decrease in sales of Lm15.5 million. Other significant decreases in turnover were also registered in the Food and Beverages (Lm8.4 million), in the Chemicals and chemical products (Lm8.2 million) and in the Furniture & Manufacturing n.e.c. (Lm4.1 million).

During the 2004-2005 period, the main increases in sales were registered in the Chemicals and chemical products registered (Lm17.5 million), in the Textiles and textiles products subsector (Lm6.9 million) and in the Other non-metallic mineral products (Lm6.2 million). For the same period, the Radio, TV and Communication equipment subsector registered a decrease in sales of Lm86.7 million. Other decreases in sales were also registered in the Wearing Apparel and Clothes sub-sector by Lm10.7 million and the Tobacco products and the Leather and Leather products subsectors by Lm2.8 million and Lm2.4 million respectively.

Employment, Wages & Salaries

Between 2003 and 2005, when taking the average employment throughout each year, an overall decrease in employment of 1,308 was recorded. The largest average net increase in employment was recorded in the Textiles and textiles products industry (239 employees) and the main average net decrease was registered in the Wearing apparel and clothes industry (684 employees).

Wages and salaries decreased by 2.0 per cent between 2003 and 2004 and by 1.2 per cent between 2004 and 2005.

Investment

Overall investment rose by 9.1 per cent between 2003 and 2004 from nearly Lm49 million to Lm53.4 million and decreased by 6.7 per cent, from Lm53.4 to 49.9 million, between 2004 and 2005.

Average Earnings and Turnover per Employee

Average earnings per employee in the manufacturing industry increased by 2.6 per cent between 2003 and 2004 from Lm5,936 to Lm6,091 and by 0.7 per cent between 2004 and 2005 from Lm6,091 to Lm6,133.

Between 2003 and 2004, the rate of average turnover per employee registered an increase of 3 per cent from Lm49,498 to Lm50,975, yet registered a decrease of 3.9 per cent from Lm50,975 to Lm 48,979 between 2004 and 2005 ■

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Table 1. Turnover in manufacturing industry: 2003-2005

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Sector	2003					2004					2005				
	Q1	Q2	Q3	Q4	Totals	Q1	Q2	Q3	Q4	Totals	Q1	Q2	Q3	Q4	Totals
15 – Food and Beverages	24,993	31,830	38,092	29,471	124,386	25,930	30,807	32,371	26,893	116,002	23,443	29,845	35,237	26,393	114,917
16 – Tobacco products	6,906	7,913	8,257	7,087	30,163	6,485	8,627	9,760	8,814	33,687	7,291	7,835	8,696	7,083	30,905
17 – Textiles and textile products	3,747	4,185	4,564	2,995	15,491	6,939	6,220	6,758	7,006	26,923	7,956	8,324	9,006	8,502	33,787
18 – Wearing apparel and clothes	14,350	13,087	11,942	13,925	53,304	10,907	9,447	7,985	9,508	37,846	7,067	6,237	7,298	6,564	27,166
19 – Leather and leather products	3,318	2,717	2,419	2,448	10,902	2,409	1,740	1,787	1,935	7,871	1,724	1,356	1,271	1,073	5,424
20 – Wood and wood products	94	147	134	122	497	68	87	85	141	380	89	142	143	127	502
21 – Paper and paper products	1,895	1,755	1,960	1,832	7,442	1,759	1,825	2,085	1,832	7,502	1,446	1,806	1,768	1,740	6,760
22 – Publishing and printing	12,948	10,142	13,450	12,789	49,329	13,273	10,619	11,919	12,784	48,595	13,646	13,084	9,772	16,170	52,673
23/24 – Chemicals and chemical products	8,112	9,028	8,933	11,062	37,135	9,139	7,431	5,511	6,823	28,904	8,096	10,431	13,714	14,134	46,374
25 – Rubber and plastic products	9,756	10,374	8,833	9,041	38,004	10,386	9,479	9,621	9,428	38,914	10,075	10,214	8,841	9,173	38,303
26 – Other non-metallic mineral products	3,014	3,888	3,381	3,981	14,264	3,274	3,678	3,656	4,076	14,685	4,758	5,466	5,272	5,396	20,892
27 – Basic metals products	62	64	92	60	278	-	-	-	-	-	-	-	-	-	-
28 – Fabricated metal products	4,632	3,975	3,050	4,039	15,696	3,131	3,404	3,421	4,163	14,120	4,308	4,686	4,770	4,422	18,186
29 – Machinery and equipment n.e.c.	2,807	3,306	3,728	3,084	12,925	3,500	3,061	3,160	2,784	12,504	3,273	4,275	3,703	3,930	15,181
30 – Office machinery and computers	164	152	274	230	820	-	-	-	-	-	-	-	-	-	-
31 – Electrical machinery and apparatus	8,369	10,528	9,343	9,840	38,080	10,150	8,528	11,682	15,190	45,549	12,483	12,873	12,821	12,129	50,307
32 – Radio, TV and Communication equipment	118,343	118,593	124,068	125,710	486,714	122,971	122,554	126,289	112,267	484,081	91,099	101,981	99,028	105,296	397,404
33 – Medical, precision and optical instruments	6,109	6,900	6,444	7,535	26,988	8,743	8,622	9,055	9,038	35,458	8,775	8,956	8,221	9,979	35,931
34 – Motor vehicles, trailers and semi-trailers	152	204	185	187	728	145	171	124	198	638	170	134	108	192	604
35 – Other transport equipment	3,341	3,901	4,747	4,064	16,053	3,322	3,728	2,568	3,434	13,052	3,215	3,431	2,566	3,536	12,748
36 – Furniture and Manufacturing n.e.c.	11,337	12,345	12,469	13,037	49,188	11,337	10,137	12,094	11,479	45,047	9,246	12,324	13,063	10,824	45,457
Totals	244,449	255,034	266,365	262,530	1,028,377	253,868	250,166	259,931	247,793	1,011,757	218,160	243,400	245,298	246,663	953,521

Note: Totals may not add up due to rounding.

Chart 1. Turnover in manufacturing industry 2003-2005

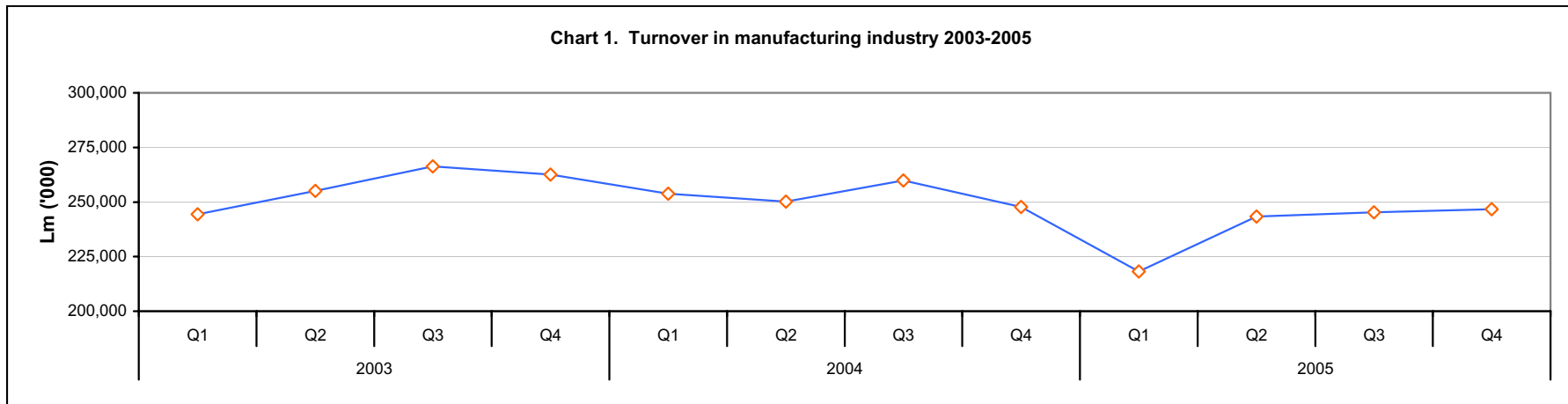


Table 2. Employment in manufacturing industry: 2003-2005

Sector	2003					2004					2005				
	Q1	Q2	Q3	Q4	Avg. Emp	Q1	Q2	Q3	Q4	Avg. Emp	Q1	Q2	Q3	Q4	Avr. Emp
15 – Food and Beverages	3,075	3,207	3,206	3,097	3,146	3,059	3,155	3,062	2,906	3,046	2,896	3,018	3,030	2,962	2,977
16 – Tobacco products	161	161	160	158	160	158	157	160	158	158	159	159	159	160	159
17 – Textiles and textile products	884	847	822	631	796	958	1,017	1,069	1,189	1,058	1,095	1,110	1,083	851	1,035
18 – Wearing apparel and clothes	2,486	2,178	2,004	1,989	2,164	1,598	1,785	1,572	1,594	1,637	1,570	1,472	1,444	1,433	1,480
19 – Leather and leather products	629	558	463	456	527	456	425	410	394	421	350	327	295	277	312
20 – Wood and wood products	47	48	48	41	46	31	31	30	31	31	31	31	30	30	31
21 – Paper and paper products	281	276	288	284	282	284	287	287	283	285	284	278	269	267	275
22 – Publishing and printing	1,636	1,627	1,653	1,643	1,640	1,636	1,634	1,631	1,598	1,625	1,601	1,588	1,583	1,589	1,590
23/24 – Chemicals and chemical products	1,063	1,056	1,041	1,076	1,059	800	805	816	788	802	777	841	868	847	833
25 – Rubber and plastic products	1,760	1,758	1,672	1,681	1,718	1,749	1,776	1,870	1,877	1,818	1,867	1,782	1,713	1,654	1,754
26 – Other non-metallic mineral products	692	692	679	675	685	691	675	651	659	669	727	736	724	719	727
27 – Basic metals products	48	48	47	48	48	-	-	-	-	-	-	-	-	-	-
28 – Fabricated metal products	686	675	658	646	666	650	651	653	641	649	651	671	699	686	677
29 – Machinery and equipment n.e.c.	359	366	392	418	384	419	420	437	431	427	451	453	456	452	453
30 – Office machinery and computers	17	19	19	19	19	-	-	-	-	-	-	-	-	-	-
31 – Electrical machinery and apparatus	1,201	1,209	1,193	1,130	1,183	1,141	1,140	1,160	1,151	1,148	1,130	1,074	1,072	1,064	1,085
32 – Radio, TV and Communication equipment	3,367	3,300	3,247	3,194	3,277	2,998	3,031	3,104	3,060	3,048	3,054	2,994	2,973	3,013	3,009
33 – Medical, precision and optical instruments	967	970	990	1,041	992	1,212	1,198	1,156	1,153	1,180	1,184	1,150	1,182	1,105	1,155
34 – Motor vehicles, trailers and semi-trailers	43	48	52	50	48	51	54	56	54	54	60	60	44	43	52
35 – Other transport equipment	218	218	221	213	218	233	232	232	233	233	234	234	235	227	233
36 – Furniture and Manufacturing n.e.c.	1,730	1,770	1,719	1,659	1,720	1,606	1,569	1,542	1,522	1,560	1,587	1,657	1,634	1,656	1,634
Totals	21,350	21,031	20,574	20,149	20,776	19,730	20,042	19,898	19,722	19,848	19,708	19,635	19,493	19,035	19,468

Chart 2. Employment in manufacturing industry: 2003-2005



Table 3. Wages and salaries in manufacturing industry: 2003 - 2005

Sector	2003					2004					2005				
	Q1	Q2	Q3	Q4	Totals	Q1	Q2	Q3	Q4	Totals	Q1	Q2	Q3	Q4	Totals
15 – Food and Beverages	4,083	4,261	4,642	4,256	17,242	4,156	4,301	4,325	4,152	16,934	3,954	4,262	4,355	4,294	16,865
16 – Tobacco products	319	287	301	298	1,204	293	304	308	312	1,215	305	290	308	315	1,219
17 – Textiles and textile products	912	1,043	782	558	3,295	1,273	1,200	1,406	1,468	5,346	1,493	1,516	1,497	1,235	5,740
18 – Wearing apparel and clothes	3,082	2,433	2,298	2,342	10,155	2,049	1,938	1,924	1,954	7,864	1,888	1,789	1,715	1,829	7,221
19 – Leather and leather products	680	612	562	513	2,367	520	459	453	446	1,878	395	382	343	339	1,459
20 – Wood and wood products	40	41	41	43	165	24	28	28	33	112	26	28	27	32	113
21 – Paper and paper products	424	442	459	473	1,798	444	458	471	447	1,820	446	424	429	425	1,723
22 – Publishing and printing	2,811	2,662	2,662	2,753	10,888	3,050	3,059	2,644	2,839	11,592	2,795	2,743	2,873	2,893	11,303
23/24 – Chemicals and chemical products	1,731	1,772	1,607	1,761	6,871	1,329	1,248	1,464	1,305	5,346	1,292	1,322	1,407	1,390	5,410
25 – Rubber and plastic products	2,628	2,725	2,604	2,721	10,677	2,831	2,999	2,633	2,645	11,107	2,831	2,762	2,441	2,491	10,525
26 – Other non-metallic mineral products	785	771	751	793	3,100	811	771	739	772	3,094	811	905	889	872	3,476
27 – Basic metals products	68	67	66	65	266	-	-	-	-	-	-	-	-	-	-
28 – Fabricated metal products	968	948	897	989	3,803	1,032	959	982	957	3,930	995	1,016	988	956	3,955
29 – Machinery and equipment n.e.c.	544	541	568	534	2,187	631	584	611	617	2,443	631	669	659	660	2,619
30 – Office machinery and computers	20	23	23	24	90	-	-	-	-	-	-	-	-	-	-
31 – Electrical machinery and apparatus	1,887	1,859	1,972	1,942	7,660	1,846	1,794	1,909	1,876	7,424	1,912	1,837	1,844	1,767	7,359
32 – Radio, TV and Communication equipment	5,637	5,814	5,679	5,762	22,891	5,405	5,217	5,587	5,657	21,866	5,408	5,196	5,188	5,370	21,162
33 – Medical, precision and optical instruments	1,940	1,474	1,461	1,467	6,343	1,932	1,747	1,646	1,874	7,199	1,782	1,810	1,577	1,651	6,820
34 – Motor vehicles, trailers and semi-trailers	39	42	50	50	182	53	54	55	51	213	59	63	41	43	207
35 – Other transport equipment	535	416	442	447	1,840	452	472	403	480	1,807	476	503	499	529	2,007
36 – Furniture and Manufacturing n.e.c.	2,584	2,630	2,587	2,505	10,307	2,590	2,325	2,286	2,497	9,699	2,559	2,532	2,550	2,574	10,215
Totals	31,717	30,863	30,455	30,295	123,331	30,720	29,917	29,873	30,382	120,891	30,056	30,047	29,631	29,664	119,398

Note: Totals may not add up due to rounding.

Chart 3. Wages and salaries in manufacturing industry: 2003-2005



Table 4. Investment in Manufacturing Industry: 2003-2005

Sector	2003					2004					2005			
	Q1	Q2	Q3	Q4	Totals	Q1	Q2	Q3	Q4	Totals	Q1	Q2	Q3	Q4
15 – Food and Beverages	1,295	2,714	1,405	2,628	8,042	470	2,295	1,200	733	4,698	1,277	1,374	1,219	891
16 – Tobacco products	37	35	26	33	131	27	37	72	106	242	51	25	59	538
17 – Textiles and textile products	262	42	2	0	306	445	593	309	1,655	3,002	898	328	560	1,220
18 – Wearing apparel and clothes	67	165	168	54	454	18	28	74	21	141	6	22	24	46
19 – Leather and leather products	54	24	24	17	119	22	18	6	7	53	3	3	4	1
20 – Wood and wood products	0	0	0	2	2	0	0	1	0	1	0	0	0	0
21 – Paper and paper products	0	0	18	4	22	252	150	4	887	1,293	56	13	32	34
22 – Publishing and printing	539	1,720	211	586	3,056	4,410	141	552	537	5,640	1,140	977	771	62
23/24 – Chemicals and chemical products	1,223	914	1,279	3,166	6,582	5,089	1,620	1,208	2,167	10,084	1,963	1,887	1,187	1,729
25 – Rubber and plastic products	234	1,212	824	403	2,673	471	124	456	786	1,837	517	288	174	502
26 – Other non-metallic mineral products	154	44	97	110	405	45	4	28	23	100	161	117	216	337
27 – Basic metals products	0	0	0	2	2	-	-	-	-	-	-	-	-	-
28 – Fabricated metal products	157	85	109	113	464	46	47	18	299	410	110	419	513	36
29 – Machinery and equipment n.e.c.	261	100	19	9	389	20	111	7	22	160	18	35	154	14
30 – Office machinery and computers	0	1	0	0	1	-	-	-	-	-	-	-	-	-
31 – Electrical machinery and apparatus	597	389	463	399	1,848	228	662	621	217	1,728	702	202	226	133
32 – Radio, TV and Communication equipment	3,463	5,296	5,598	3,167	17,524	5,129	4,475	5,033	3,533	18,170	4,074	4,834	5,144	7,602
33 – Medical, precision and optical instruments	122	99	141	561	923	218	727	54	194	1,193	127	135	69	311
34 – Motor vehicles, trailers and semi-trailers	0	0	0	1	1	1	0	1	0	2	2	23	8	2
35 – Other transport equipment	524	69	24	96	713	19	16	31	51	117	23	67	23	7
36 – Furniture and Manufacturing n.e.c.	1,973	340	1,656	1,337	5,306	1,570	904	735	1,339	4,548	1,093	1,239	1,028	774
Totals	10,962	13,249	12,064	12,688	48,963	18,480	11,952	10,410	12,578	53,420	12,220	11,988	11,411	14,238

Note: Totals may not add up due to rounding.

Chart 4. Investment in manufacturing industry: 2003-2005

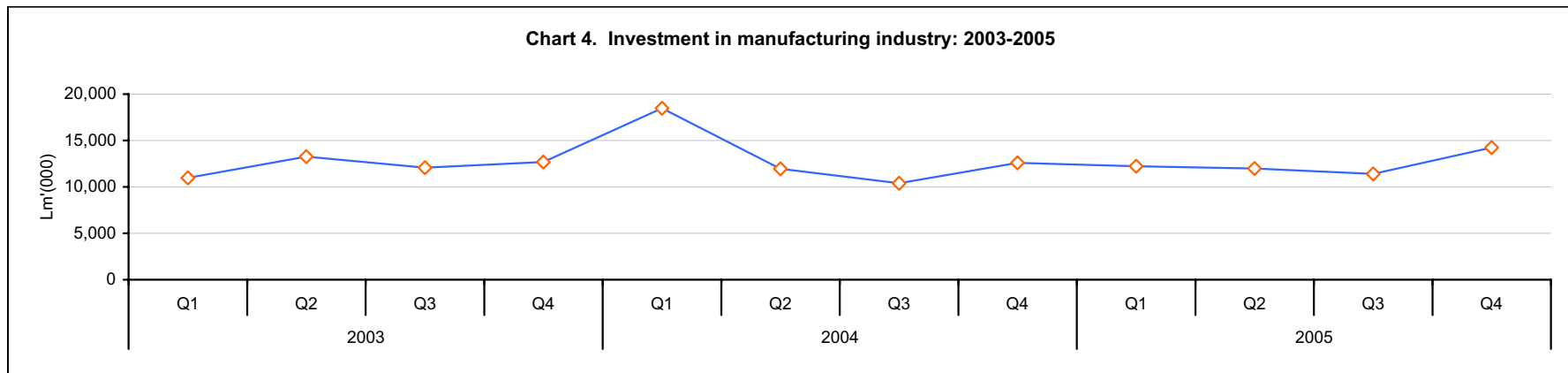


Table 5. Average annual earnings per employee in manufacturing industry: 2003-2005

Sectors	Wages & Salaries (Lm'000)			Average Employment			Average Annual Earnings per employee (Lm)		
	2003	2004	2005	2003	2004	2005	2003	2004	2005
15 – Food and Beverages	17,242	16,934	16,865	3,146	3,046	2,977	5,480	5,560	5,666
16 – Tobacco products	1,204	1,215	1,219	160	158	159	7,528	7,680	7,652
17 – Textiles and textile products	3,295	5,346	5,740	796	1,058	1,035	4,140	5,052	5,547
18 – Wearing apparel and clothes	10,155	7,864	7,221	2,164	1,637	1,480	4,692	4,803	4,880
19 – Leather and leather products	2,367	1,878	1,459	527	421	312	4,496	4,459	4,673
20 – Wood and wood products	165	112	113	46	31	31	3,585	3,644	3,693
21 – Paper and paper products	1,798	1,820	1,723	282	285	275	6,371	6,382	6,276
22 – Publishing and printing	10,888	11,592	11,303	1,640	1,625	1,590	6,640	7,135	7,107
23/24 – Chemicals and chemical products	6,871	5,346	5,410	1,059	802	833	6,488	6,664	6,493
25 – Rubber and plastic products	10,677	11,107	10,525	1,718	1,818	1,754	6,216	6,110	6,001
26 – Other non-metallic mineral products	3,100	3,094	3,476	685	669	727	4,528	4,625	4,785
27 – Basic metals products	266	-	-	48	-	-	5,579	-	-
28 – Fabricated metal products	3,803	3,930	3,955	666	649	677	5,708	6,058	5,844
29 – Machinery and equipment n.e.c.	2,187	2,443	2,619	384	427	453	5,699	5,724	5,782
30 – Office machinery and computers	90	-	-	19	-	-	4,861	-	-
31 – Electrical machinery and apparatus	7,660	7,424	7,359	1,183	1,148	1,085	6,473	6,467	6,782
32 – Radio, TV and Communication equipment	22,891	21,866	21,162	3,277	3,048	3,009	6,985	7,173	7,034
33 – Medical, precision and optical instruments	6,343	7,199	6,820	992	1,180	1,155	6,394	6,102	5,903
34 – Motor vehicles, trailers and semi-trailers	182	213	207	48	54	52	3,767	3,966	3,994
35 – Other transport equipment	1,840	1,807	2,007	218	233	233	8,461	7,770	8,631
36 – Furniture and Manufacturing n.e.c.	10,307	9,699	10,215	1,720	1,560	1,634	5,994	6,218	6,254
Totals	123,331	120,891	119,398	20,776	19,848	19,468	5,936	6,091	6,133

Note: Totals may not add up due to rounding.

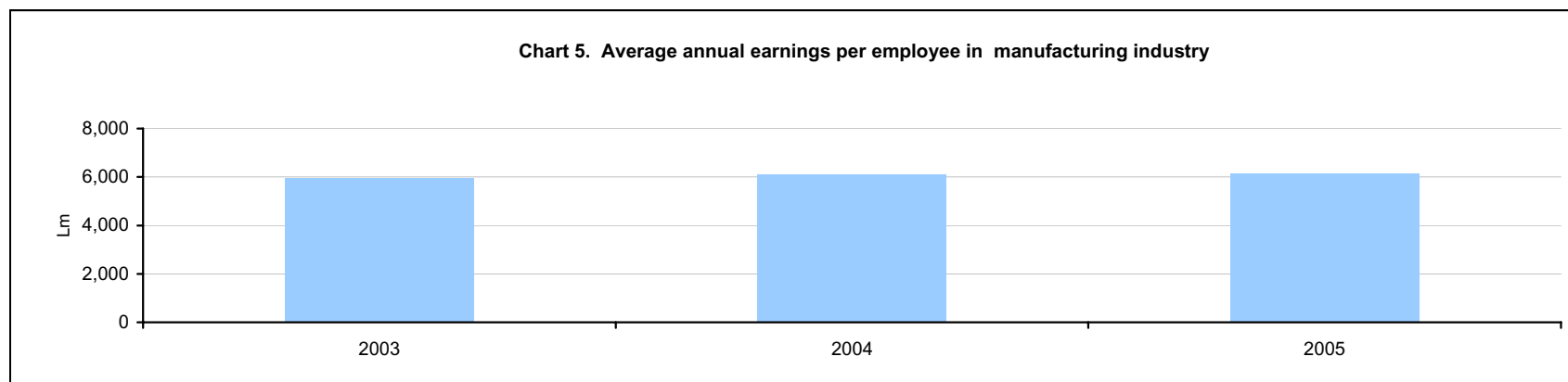
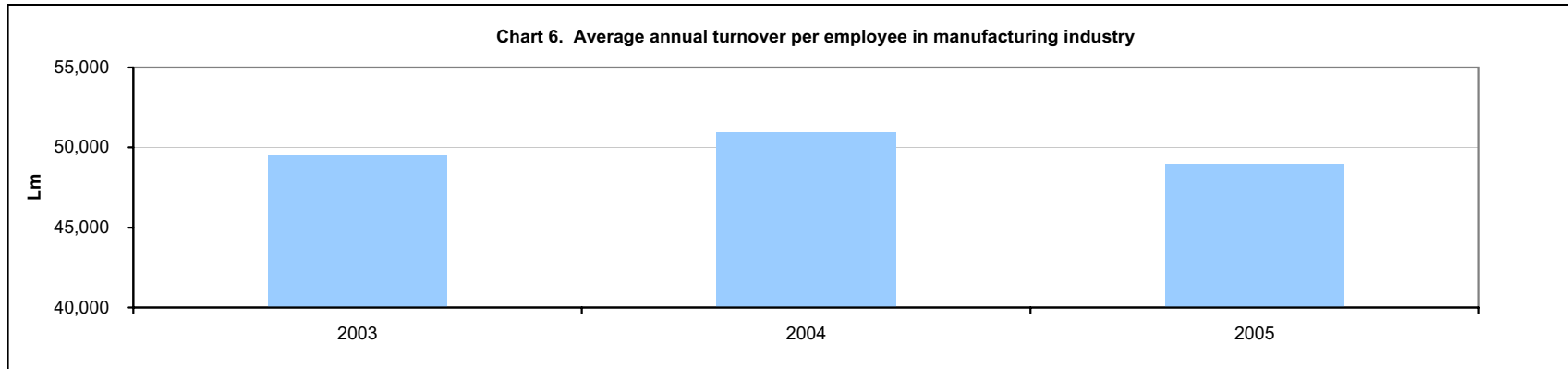


Table 6. Average annual turnover per employee in manufacturing industry: 2003-2005

Sectors	Turnover (Lm'000)			Average Employment			Avg. Annual Turnover per Employee (Lm)		
	2003	2004	2005	2003	2004	2005	2003	2004	2005
15 – Food and Beverages	124,386	116,002	114,917	3,146	3,046	2,977	39,535	38,089	38,608
16 – Tobacco products	30,163	33,687	30,905	160	158	159	188,519	212,869	194,067
17 – Textiles and textile products	15,491	26,923	33,787	796	1,058	1,035	19,461	25,441	32,653
18 – Wearing apparel and clothes	53,304	37,846	27,166	2,164	1,637	1,480	24,629	23,116	18,358
19 – Leather and leather products	10,902	7,871	5,424	527	421	312	20,707	18,686	17,369
20 – Wood and wood products	497	380	502	46	31	31	10,804	12,362	16,447
21 – Paper and paper products	7,442	7,502	6,760	282	285	275	26,367	26,299	24,626
22 – Publishing and printing	49,329	48,595	52,673	1,640	1,625	1,590	30,083	29,909	33,122
23/24 – Chemicals and chemical products	37,135	28,904	46,374	1,059	802	833	35,066	36,029	55,655
25 – Rubber and plastic products	38,004	38,914	38,303	1,718	1,818	1,754	22,124	21,405	21,837
26 – Other non-metallic mineral products	14,264	14,685	20,892	685	669	727	20,839	21,951	28,757
27 – Basic metals products	278	-	-	48	-	-	5,822	-	-
28 – Fabricated metal products	15,696	14,120	18,186	666	649	677	23,559	21,764	26,872
29 – Machinery and equipment n.e.c.	12,925	12,504	15,181	384	427	453	33,681	29,301	33,513
30 – Office machinery and computers	820	-	-	19	-	-	44,324	-	-
31 – Electrical machinery and apparatus	38,080	45,549	50,307	1,183	1,148	1,085	32,183	39,677	46,365
32 – Radio, TV and Communication equipment	486,714	484,081	397,404	3,277	3,048	3,009	148,524	158,806	132,094
33 – Medical, precision and optical instruments	26,988	35,458	35,931	992	1,180	1,155	27,206	30,055	31,103
34 – Motor vehicles, trailers and semi-trailers	728	638	604	48	54	52	15,088	11,863	11,679
35 – Other transport equipment	16,053	13,052	12,748	218	233	233	73,807	56,137	54,832
36 – Furniture and Manufacturing n.e.c.	49,188	45,047	45,457	1,720	1,560	1,634	28,606	28,881	27,828
Totals	1,028,378	1,011,757	953,521	20,776	19,848	19,468	49,498	50,975	48,979

Note: Totals may not add up due to rounding.



METHODOLOGICAL NOTES

This release is compiled on data that has been collected on a monthly basis, by means of a sample survey, covering employment, wages and salaries, turnover and investment data of the manufacturing industry. The results are compiled in quarterly reports and published in accordance with NACE Rev 1.1 (the statistical classification of economic activities in the European Community).

It is important to note, that during the course of this 3-year span, some enterprises have changed their main activity of production due to restructuring. A re-classification of these enterprises according to their new activity was carried out. This resulted in a shift of enterprises to and from different manufacturing sectors and even the exclusion of some enterprises from the manufacturing activity.

Furthermore, for the same reasons stated above, the enterprises which were classified in sector 30 and formed part of this survey, were all re-classified. Consequently this sector will be omitted in future releases. In the case of sector 27, the remaining enterprise was amalgamated with sector 28, to respect the confidentiality of this enterprise. Therefore, sector 27 will be also omitted in future releases.

SUMMARY DEFINITIONS OF KEY VARIABLES:

Employment: this covers all persons employed, regardless of whether they are full-time or part-time, and includes paid employees as well as working proprietors and unpaid family workers.

With regards to Table 2. Employment in Manufacturing Industry 2003-2005, the total employment for each quarter in the manufacturing sectors refers to the end-of-month figures marking the end of every quarter, i.e., March, June, September and December.

Wages & 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.

Turnover: is made up of all local sales, which are exclusive of VAT and exports on an FOB basis. The export sales are based on: (a) the customs declarations to countries that are not members states of the European Union (EU) and on (b) the Supplementary Declaration that traders in merchandise goods must submit in respect of dispatches (exports) of good to the member states of the EU.

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.

STATUS OF THE DATA

The data in this release is not seasonally adjusted and should be considered as provisional and therefore subject to revision. Regular revisions to quarterly data may be carried out for up to two (2) years after the reference period.