

News Release

e-stats service



Date: 2 September 2005
No. : 188/2005
Time of release: 11.00 hrs

Theme:
Industry and Services

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Business

Manufacturing survey: April - June 2005

Manufacturing Sales

In the second quarter this year, total sales by manufacturing enterprises decreased by Lm11.7 million or 4.7 per cent to Lm 239.4 million from Lm251.1 million a year earlier.

During the period under review, sales by the Radio, TV and Communication equipment manufacturing sub-sector were down by Lm22.9 million or 18.7 per cent to Lm 99.7 million from Lm122.6 million last year. At the same time, drops in sales were also registered by the Wearing apparel and clothes and the Food and beverages manufacturing sub-sectors by Lm3.2 million and Lm1 million respectively.

The Publishing and printing sub-sector enhanced its sales performance by Lm2.4 million or 22.6 per cent to Lm13 million from Lm10.6 million last year. The Textiles and textiles products sub-sector registered an increase in sales of Lm2.1 million to Lm8.3 million from Lm6.2 million. Furthermore, an increase in sales of Lm1.6 million for both the Other non-metallic mineral products and the Furniture and Manufacturing n.e.c sub-sectors was also registered.

During the first six months of 2005, the net total manufacturing sales was Lm458.2 million, registering a drop of Lm47.7 million when compared with Lm505.9 million for the same months of 2004.

Employment, Wages & Salaries

In the second quarter this year, employment in the sampled enterprises declined by a net of 288 employees to 19,754 when compared to the same period the year before. Most of the job losses were registered in the Wearing apparel and Clothes (-223 employees), the Food and beverages (-184 employees) and the Leather and leather products (-99 employees) manufacturing sub-sectors.

An increase in employment of 93 employees and 89 employees was recorded in the Textiles and textile products and in the Rubber and plastic products manufacturing sub-sectors, respectively.

When taking into account the employment at the end of March and that at the end of June 2005, a net increase of 104 employees was registered. The Furniture and Manufacturing n.e.c and the Food and beverages manufacturing sub-sectors contributed for most of this increase with 83 and 75 employees respectively.

In the period under review an amount of Lm30.1 million was paid out in gross wages and salaries by the sampled enterprises.

Investment

During the April-June quarter 2005, overall investment in manufacturing industry amounted to Lm11.3 million, basically on the same level for quarter 2 of 2004.

On the other hand, investment during the first six months of 2005 added up to Lm23.6 million, a net decrease of Lm6.8 million when compared to Lm 30.4 million registered for the same period 2004 ■

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Table 1. Total Sales

Lm'000

| Sector | 2003 | | 2004 | | 2005 | |
|---|----------------|----------------|----------------|----------------|----------------|----------------|
| | Apr.-Jun. | Jan.-Jun. | Apr.-Jun. | Jan.-Jun. | Apr.-Jun. | Jan.-Jun. |
| 15 - Food and Beverages | 31,830 | 56,823 | 30,807 | 56,737 | 29,795 | 53,238 |
| 16 - Tobacco products | 7,913 | 14,819 | 8,627 | 15,112 | 7,837 | 15,128 |
| 17 - Textiles and textile products | 4,185 | 7,932 | 6,220 | 13,159 | 8,298 | 16,253 |
| 18 - Wearing apparel and clothes | 13,087 | 27,437 | 10,386 | 22,239 | 7,201 | 15,214 |
| 19 - Leather and leather products | 2,717 | 6,035 | 1,740 | 4,149 | 1,333 | 3,057 |
| 20 - Wood and wood products | 147 | 241 | 87 | 155 | 139 | 228 |
| 21 - Paper and paper products | 1,755 | 3,650 | 1,825 | 3,585 | 1,101 | 2,547 |
| 22 - Publishing and printing | 10,142 | 23,090 | 10,619 | 23,892 | 13,049 | 26,695 |
| 23/24 - Chemicals and chemical products | 9,027 | 17,140 | 7,431 | 16,570 | 9,322 | 17,436 |
| 25 - Rubber and plastic products | 10,374 | 20,130 | 9,479 | 19,866 | 10,218 | 20,293 |
| 26 - Other non-metallic mineral products | 3,888 | 6,903 | 3,678 | 6,952 | 5,326 | 9,846 |
| Basic Metals | 64 | 126 | 0 | 0 | 0 | 0 |
| 27/28 - Fabricated metal products | 3,975 | 8,607 | 3,404 | 6,535 | 4,484 | 8,792 |
| 29 - Machinery and equipment n.e.c. | 3,306 | 6,113 | 3,061 | 6,561 | 4,355 | 7,628 |
| Office Machinery | 152 | 316 | 0 | 0 | 0 | 0 |
| 31 - Electrical machinery and apparatus | 10,528 | 18,897 | 8,528 | 18,678 | 12,872 | 25,355 |
| 32 - Radio, TV and Communication equipment | 118,593 | 236,936 | 122,554 | 245,525 | 99,697 | 190,796 |
| 33 - Medical, precision and optical instruments | 6,900 | 13,009 | 8,622 | 17,365 | 8,962 | 17,736 |
| 34 - Motor vehicles, trailers and semi-trailers | 204 | 356 | 171 | 316 | 100 | 270 |
| 35 - Other transport equipment | 3,901 | 7,242 | 3,728 | 7,050 | 3,431 | 6,647 |
| 36 - Furniture and Manufacturing n.e.c. | 12,345 | 23,681 | 10,137 | 21,474 | 11,858 | 21,049 |
| Total | 255,034 | 499,483 | 251,105 | 505,919 | 239,376 | 458,209 |

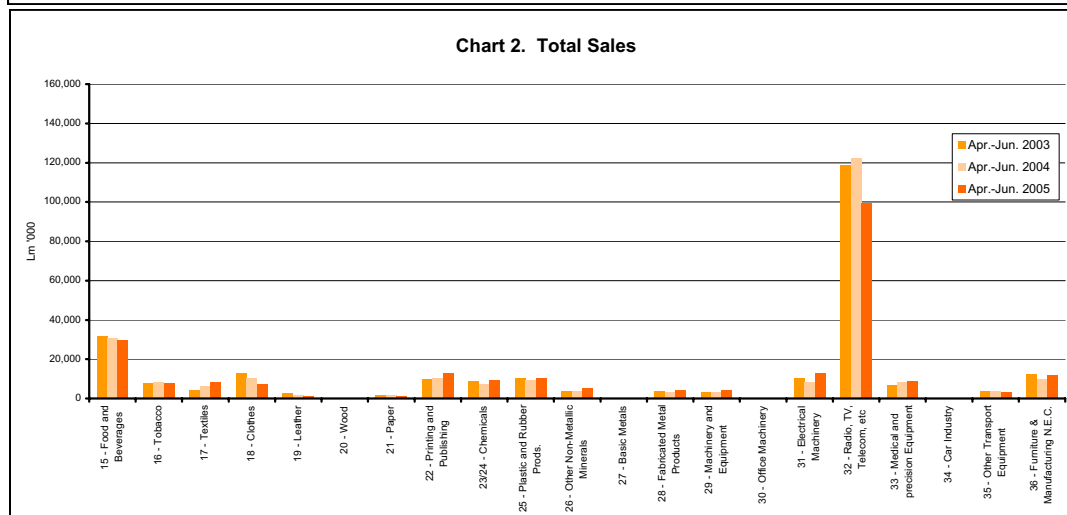
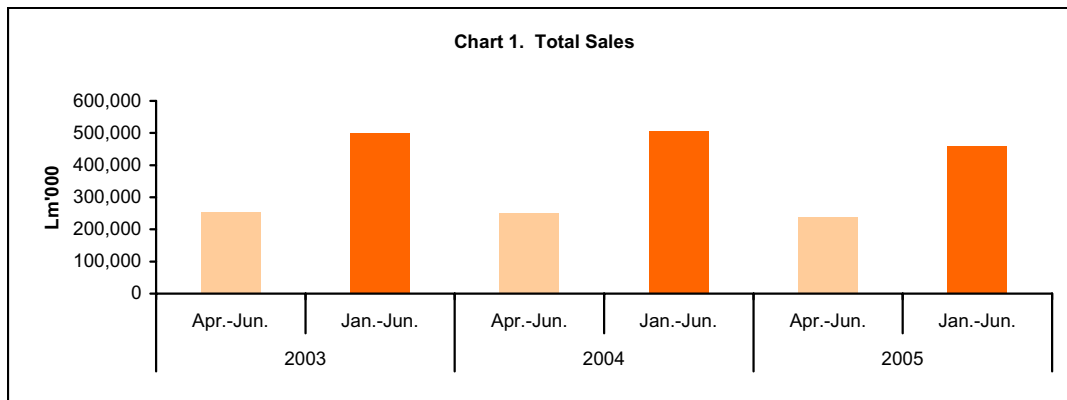


Table 2. Employment

| Sector | 2003 | | 2004 | | 2005 | |
|---|---------------|---------------|---------------|---------------|---------------|---------------|
| | End of Mar. | End of Jun. | End of Mar. | End of Jun. | End of Mar. | End of Jun. |
| 15 - Food and Beverages | 3,075 | 3,207 | 3,059 | 3,155 | 2,896 | 2,971 |
| 16 - Tobacco products | 161 | 161 | 158 | 157 | 159 | 159 |
| 17 - Textiles and textile products | 884 | 847 | 958 | 1,017 | 1,095 | 1,110 |
| 18 - Wearing apparel and clothes | 2,486 | 2,178 | 1,598 | 1,785 | 1,570 | 1,562 |
| 19 - Leather and leather products | 629 | 558 | 456 | 425 | 350 | 326 |
| 20 - Wood and wood products | 47 | 48 | 31 | 31 | 31 | 31 |
| 21 - Paper and paper products | 281 | 276 | 284 | 287 | 284 | 281 |
| 22 - Publishing and printing | 1,636 | 1,627 | 1,636 | 1,634 | 1,601 | 1,591 |
| 23/24 - Chemicals and chemical products | 1,063 | 1,056 | 800 | 805 | 777 | 838 |
| 25 - Rubber and plastic products | 1,760 | 1,758 | 1,749 | 1,776 | 1,867 | 1,865 |
| 26 - Other non-metallic mineral products | 692 | 692 | 691 | 675 | 705 | 715 |
| Basic Metals | 48 | 48 | 0 | 0 | 0 | 0 |
| 27/28 - Fabricated metal products | 686 | 675 | 650 | 651 | 651 | 667 |
| 29 - Machinery and equipment n.e.c. | 359 | 366 | 419 | 420 | 451 | 453 |
| Office Machinery | 17 | 19 | 0 | 0 | 0 | 0 |
| 31 - Electrical machinery and apparatus | 1,201 | 1,209 | 1,141 | 1,140 | 1,130 | 1,074 |
| 32 - Radio, TV and Communication equipment | 3,367 | 3,300 | 2,998 | 3,031 | 3,054 | 3,011 |
| 33 - Medical, precision and optical instruments | 967 | 970 | 1,212 | 1,198 | 1,184 | 1,172 |
| 34 - Motor vehicles, trailers and semi-trailers | 43 | 48 | 51 | 54 | 60 | 60 |
| 35 - Other transport equipment | 218 | 218 | 233 | 232 | 234 | 234 |
| 36 - Furniture and Manufacturing n.e.c. | 1,730 | 1,770 | 1,606 | 1,569 | 1,551 | 1,634 |
| Total | 21,350 | 21,031 | 19,730 | 20,042 | 19,650 | 19,754 |

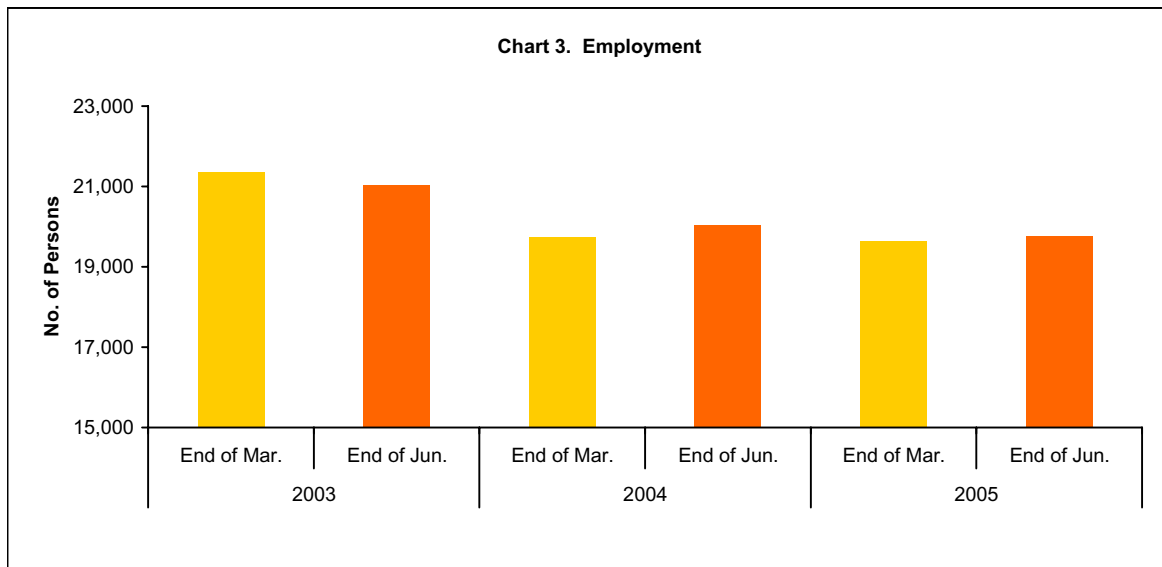


Table 3. Wages and Salaries

Lm'000

| Sector | 2003 | | 2004 | | 2005 | |
|---|---------------|---------------|---------------|---------------|---------------|---------------|
| | Apr.-Jun. | Jan.-Jun. | Apr.-Jun. | Jan.-Jun. | Apr.-Jun. | Jan.-Jun. |
| 15 - Food and Beverages | 4,261 | 8,344 | 4,301 | 8,457 | 4,233 | 8,188 |
| 16 - Tobacco products | 287 | 606 | 304 | 596 | 290 | 595 |
| 17 - Textiles and textile products | 1,043 | 1,955 | 1,200 | 2,472 | 1,518 | 3,011 |
| 18 - Wearing apparel and clothes | 2,433 | 5,515 | 1,947 | 4,005 | 1,819 | 3,712 |
| 19 - Leather and leather products | 612 | 1,291 | 459 | 979 | 382 | 777 |
| 20 - Wood and wood products | 41 | 81 | 28 | 51 | 28 | 53 |
| 21 - Paper and paper products | 442 | 865 | 458 | 902 | 446 | 891 |
| 22 - Publishing and printing | 2,662 | 5,473 | 3,059 | 6,109 | 2,764 | 5,559 |
| 23/24 - Chemicals and chemical products | 1,772 | 3,503 | 1,248 | 2,577 | 1,304 | 2,595 |
| 25 - Rubber and plastic products | 2,725 | 5,353 | 2,999 | 5,830 | 2,831 | 5,662 |
| 26 - Other non-metallic mineral products | 771 | 1,556 | 771 | 1,583 | 839 | 1,626 |
| Basic Metals | 67 | 135 | 0 | 0 | 0 | 0 |
| 27/28 - Fabricated metal products | 948 | 1,916 | 959 | 1,991 | 998 | 1,993 |
| 29 - Machinery and equipment n.e.c. | 541 | 1,085 | 584 | 1,215 | 660 | 1,291 |
| Office Machinery | 23 | 43 | 0 | 0 | 0 | 0 |
| 31 - Electrical machinery and apparatus | 1,859 | 3,747 | 1,794 | 3,639 | 1,836 | 3,748 |
| 32 - Radio, TV and Communication equipment | 5,814 | 11,451 | 5,217 | 10,622 | 5,204 | 10,612 |
| 33 - Medical, precision and optical instruments | 1,474 | 3,414 | 1,747 | 3,679 | 1,811 | 3,593 |
| 34 - Motor vehicles, trailers and semi-trailers | 42 | 81 | 54 | 107 | 96 | 156 |
| 35 - Other transport equipment | 416 | 950 | 472 | 924 | 500 | 976 |
| 36 - Furniture and Manufacturing n.e.c. | 2,630 | 5,214 | 2,325 | 4,915 | 2,491 | 5,005 |
| Total | 30,862 | 62,578 | 29,926 | 60,656 | 30,051 | 60,044 |

Chart 4. Wages and Salaries

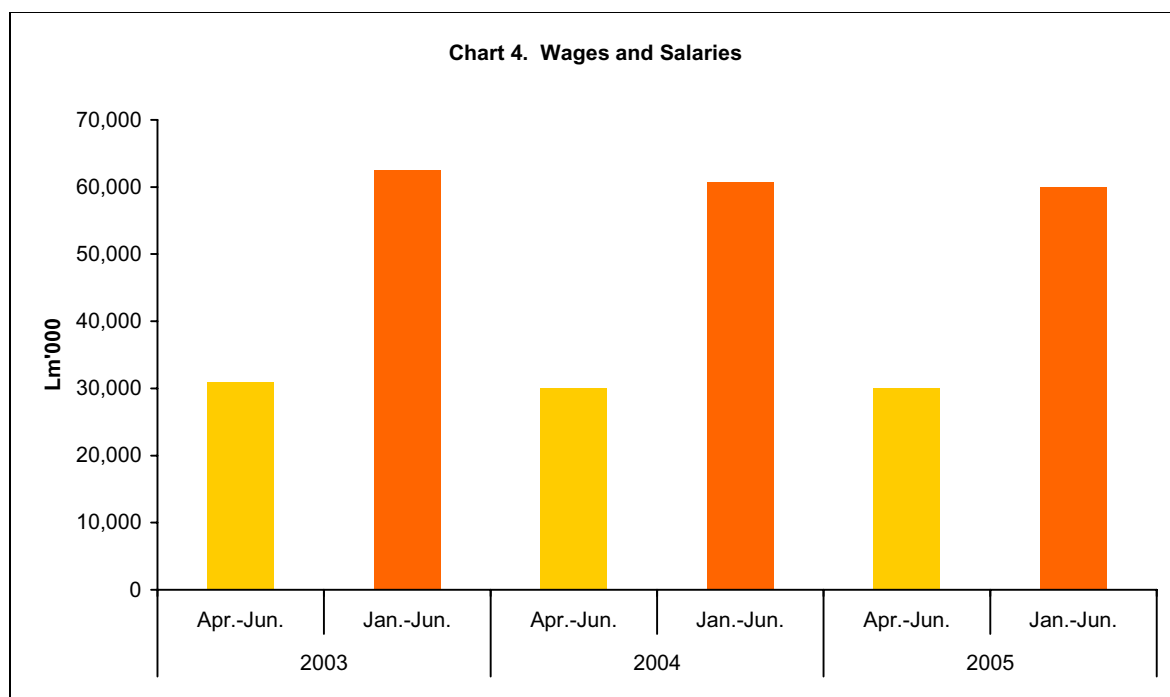
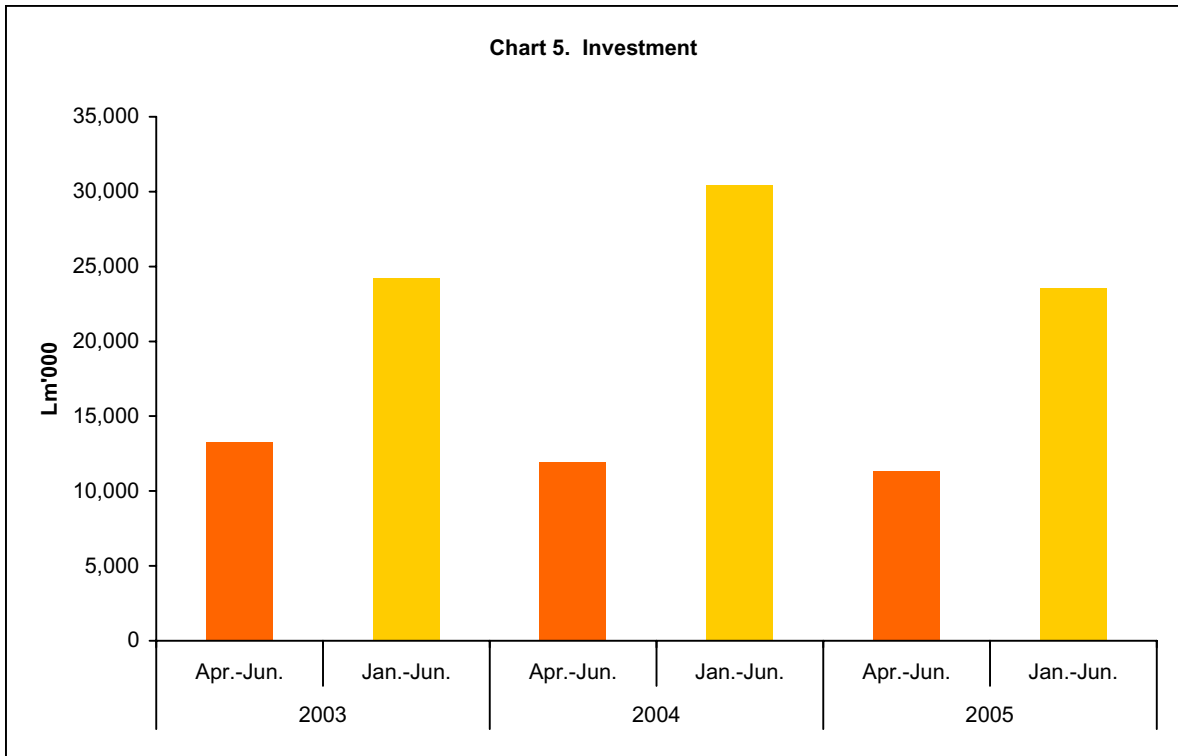


Table 4. Investment

Lm'000

| Sector | 2003 | | 2004 | | 2005 | |
|---|---------------|---------------|---------------|---------------|---------------|---------------|
| | Apr.-Jun. | Jan.-Jun. | Apr.-Jun. | Jan.-Jun. | Apr.-Jun. | Jan.-Jun. |
| 15 - Food and Beverages | 2,714 | 4,009 | 2,295 | 2,764 | 1,286 | 2,563 |
| 16 - Tobacco products | 35 | 73 | 36 | 62 | 25 | 76 |
| 17 - Textiles and textile products | 42 | 304 | 593 | 1,037 | 328 | 1,226 |
| 18 - Wearing apparel and clothes | 165 | 232 | 28 | 45 | 8 | 14 |
| 19 - Leather and leather products | 24 | 78 | 17 | 38 | 3 | 7 |
| 20 - Wood and wood products | 0 | 0 | 0 | 0 | 0 | 0 |
| 21 - Paper and paper products | 0 | 0 | 149 | 401 | 1 | 56 |
| 22 - Publishing and printing | 1,720 | 2,260 | 141 | 4,550 | 932 | 2,072 |
| 23/24 - Chemicals and chemical products | 914 | 2,136 | 1,620 | 6,708 | 1,654 | 3,617 |
| 25 - Rubber and plastic products | 1,212 | 1,446 | 123 | 594 | 207 | 724 |
| 26 - Other non-metallic mineral products | 44 | 198 | 3 | 48 | 96 | 257 |
| Basic Metals | 0 | 0 | 0 | 0 | 0 | 0 |
| 27/28 - Fabricated metal products | 85 | 242 | 46 | 91 | 407 | 517 |
| 29 - Machinery and equipment n.e.c. | 100 | 361 | 110 | 130 | 30 | 48 |
| Office Machinery | 1 | 1 | 0 | 0 | 0 | 0 |
| 31 - Electrical machinery and apparatus | 389 | 986 | 662 | 889 | 198 | 901 |
| 32 - Radio, TV and Communication equipment | 5,296 | 8,759 | 4,474 | 9,603 | 4,828 | 8,902 |
| 33 - Medical, precision and optical instruments | 99 | 221 | 727 | 944 | 71 | 197 |
| 34 - Motor vehicles, trailers and semi-trailers | 0 | 0 | 0 | 0 | 0 | 2 |
| 35 - Other transport equipment | 69 | 593 | 16 | 34 | 66 | 90 |
| 36 - Furniture and Manufacturing n.e.c. | 340 | 2,313 | 903 | 2,473 | 1,199 | 2,292 |
| Total | 13,246 | 24,211 | 11,944 | 30,412 | 11,341 | 23,560 |

Chart 5. Investment



Methodological Notes:

It is important to note, that during the course of 2003 and 2004 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 to other sectors. 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.

1. This release is based on a sample survey of 429 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 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 is not seasonally adjusted and should be considered as provisional.

7. More information on Industry Statistics is available from NSO's website at www.nso.gov.mt