

Key factors of competitiveness for the chemical industry

Eurostat

Unit G.2 – Competitiveness of European Businesses

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Outline of the presentation

- Overview with a comparison of EU, US and JP
- Evolution of main indicators
- Structural profile
- Country split
- Labour productivity
- Profitability
- Prodcom and external trade
- Inward Foreign Affiliates Statistics (iFATS)

Overview

Chemical industry (NACE Rev.2 division 20) = 0.78% of GDP in EU

	Chemical industry			
	VA in bn €	persons employed	as % of manufacturing	
			VA	employment
EU	91.7	1,180,000	6.6	3.8
US	90.0	538,924	7.2	4.1
JP	24.7	301,115	3.7	2.7

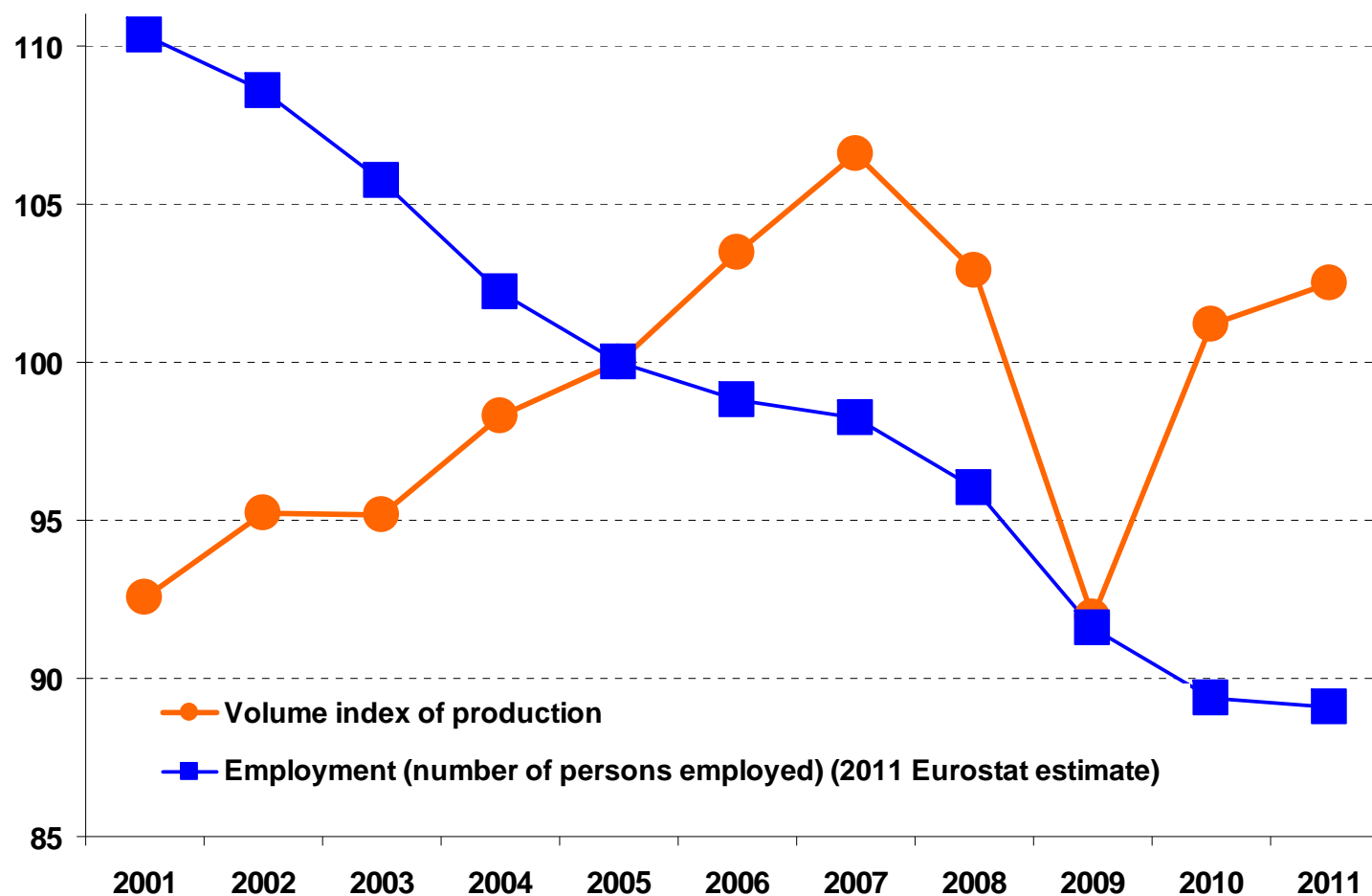
Estimates, Eurostat and OECD 2009 data (JP:2008)

Manufacture of chemicals and chemical products

Evolution of production and employment, 2001-2011

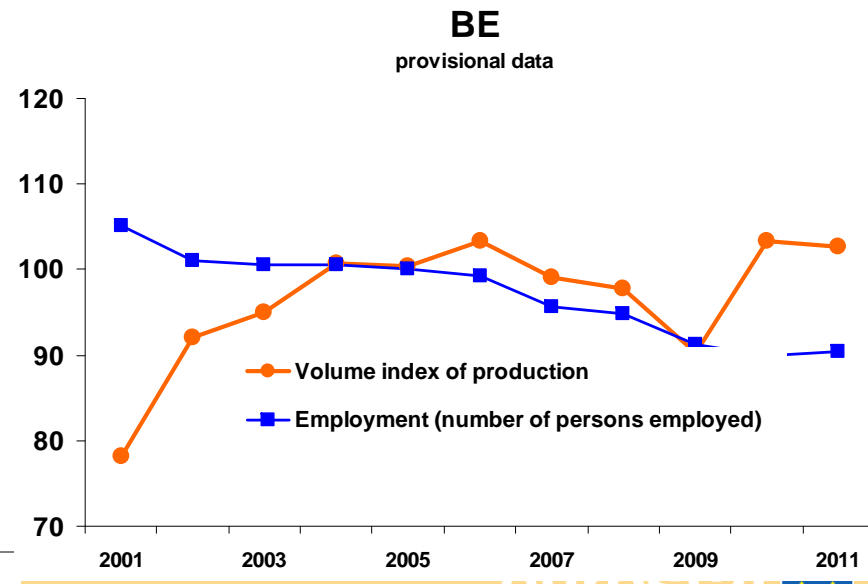
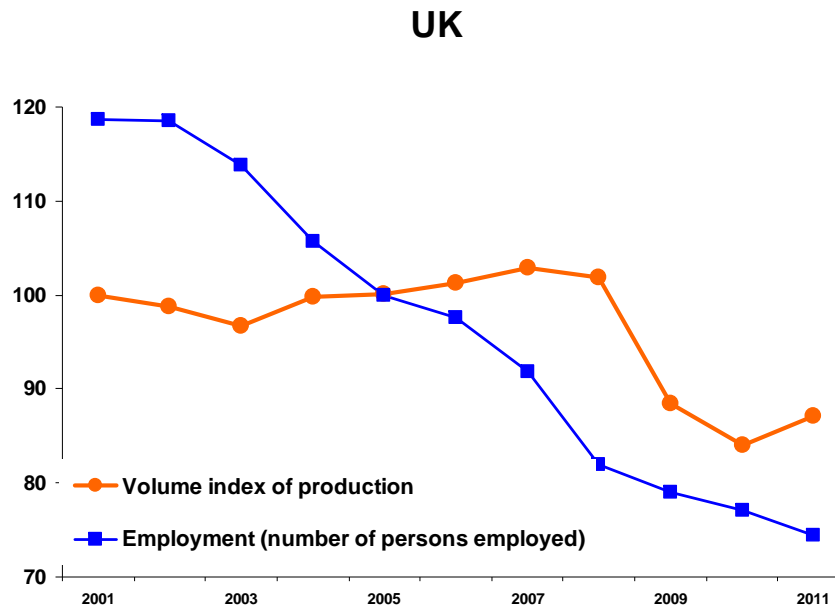
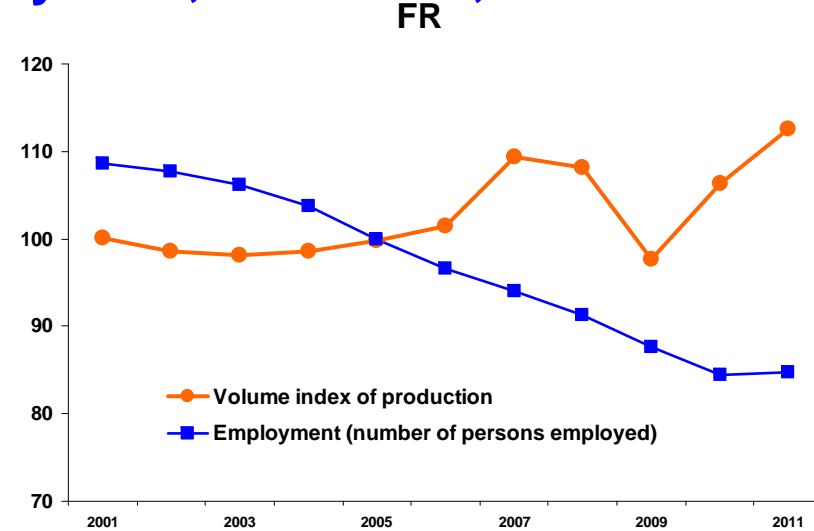
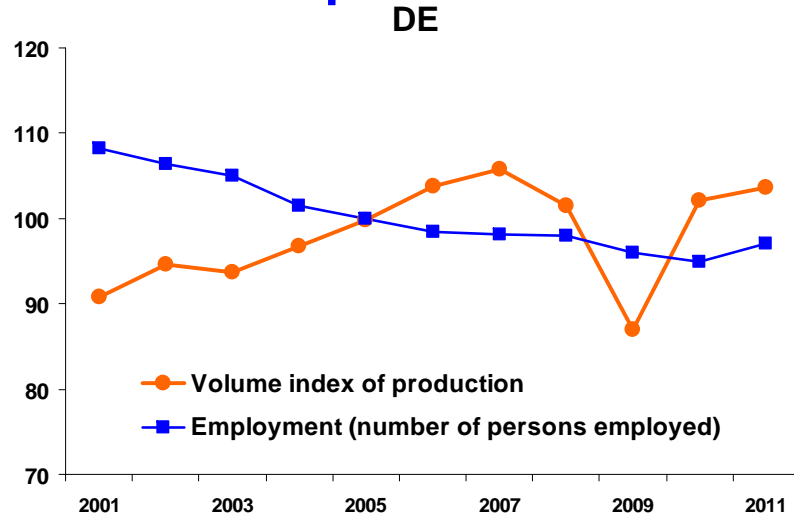
EU-27

2005=100



Manufacture of chemicals and chemical products

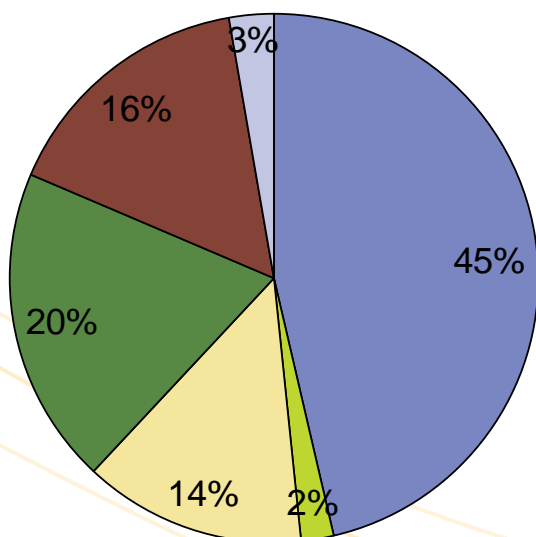
Evolution of production and employment, 2001-2011, 2005=100



Structural profile , EU-27 , 2009

value-added

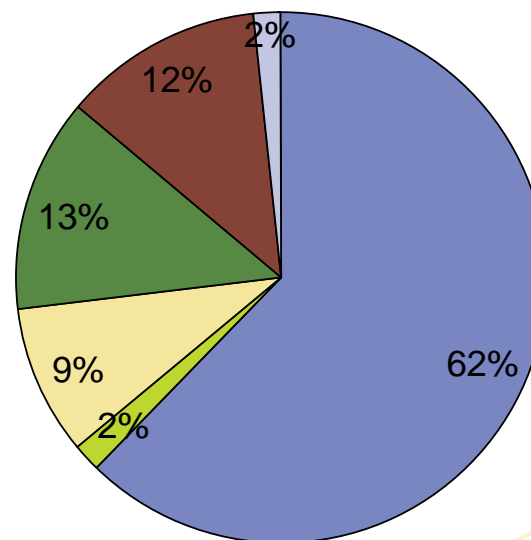
NACE groups in % of chemical industry (NACE division)



- basic chemicals, NACE group 201
- paints, NACE group 203
- other chemicals, NACE group 205

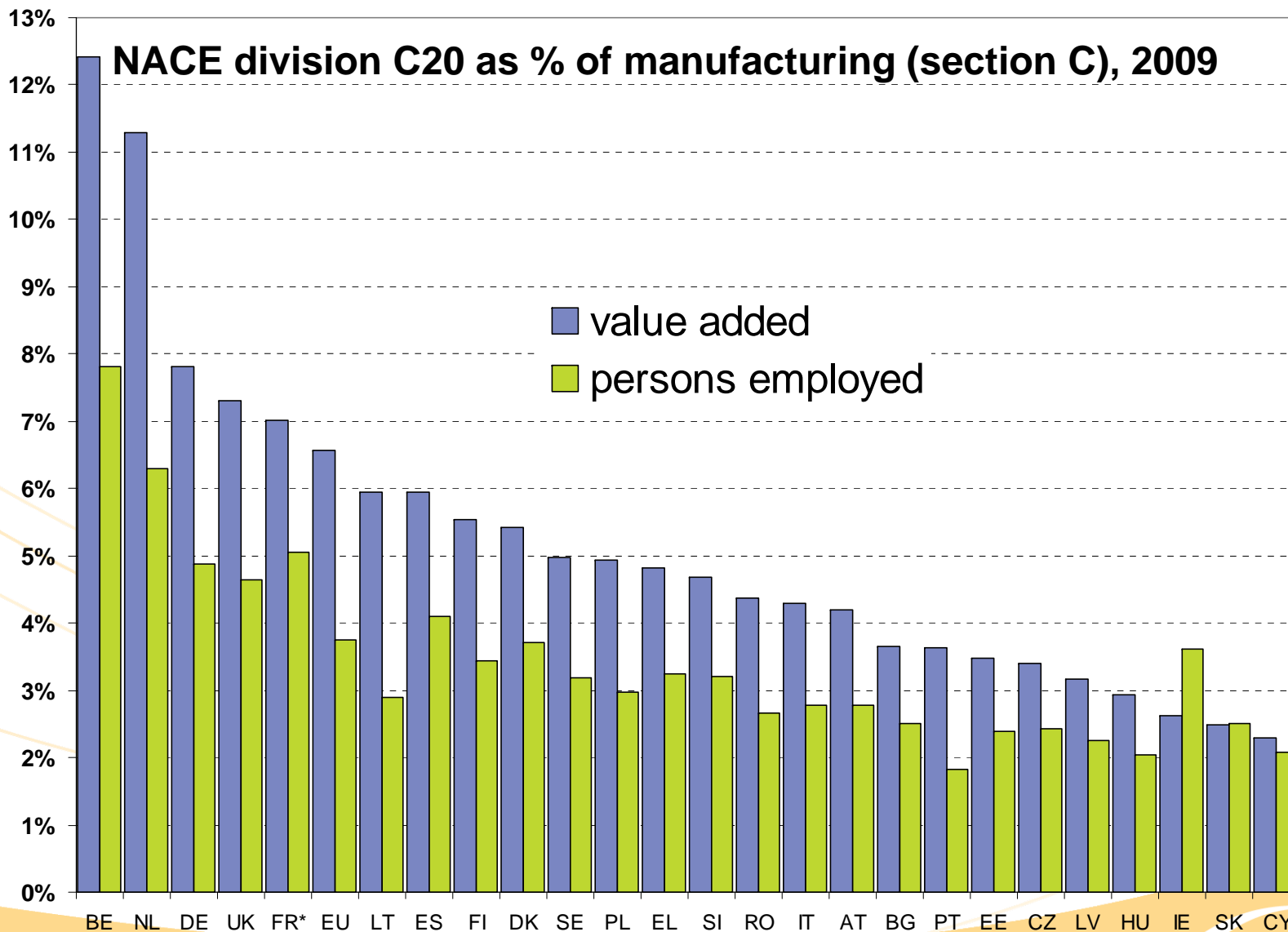
employment

NACE groups in % of chemical industry (NACE division)



- pesticides, NACE group 202
- soap, NACE group 204
- man-made fibre, NACE group 206

Manufacture of chemicals in EU and Member States

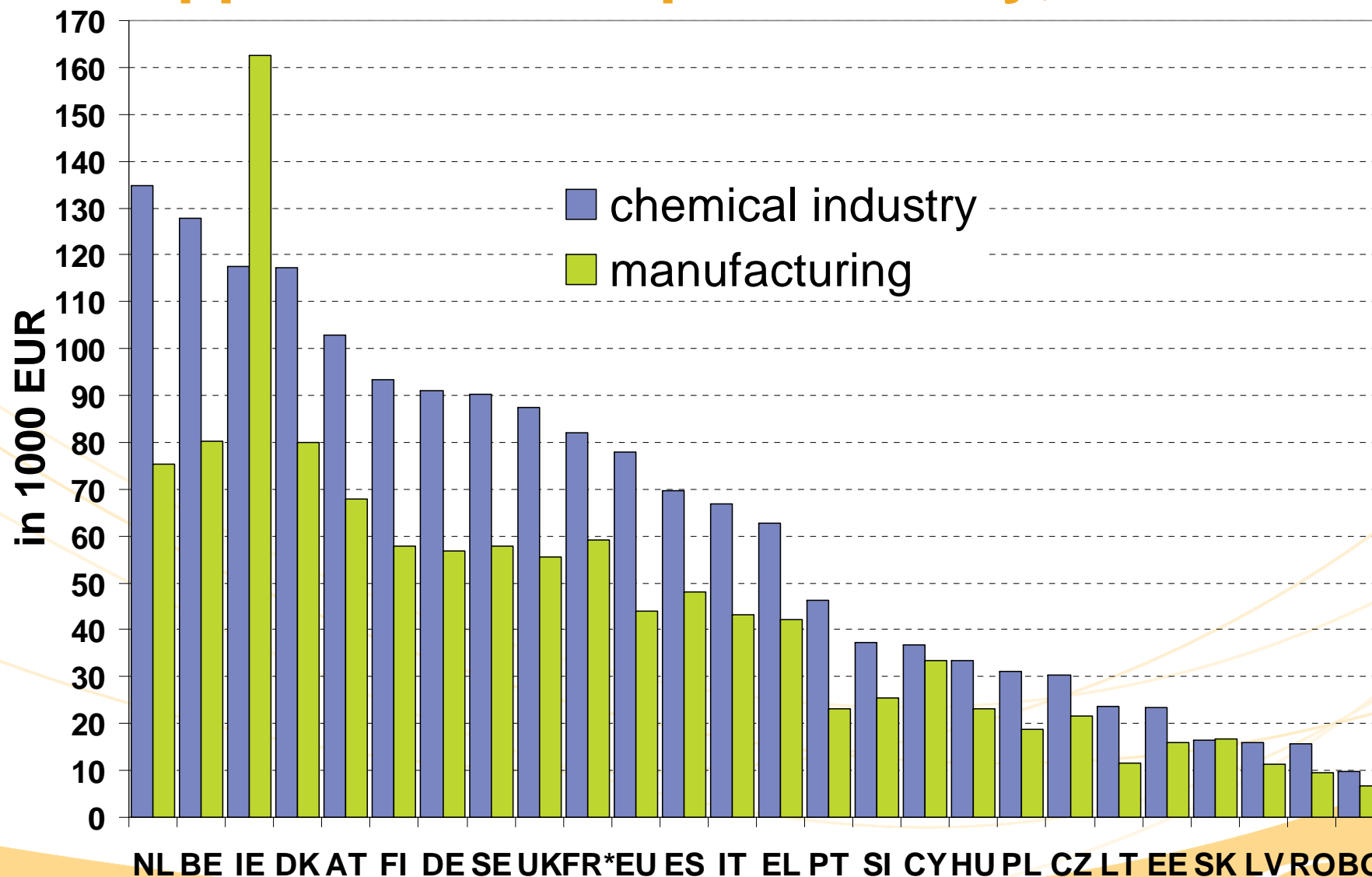


FR: estimates. RO: provisional. LU, MT: not available or confidential.

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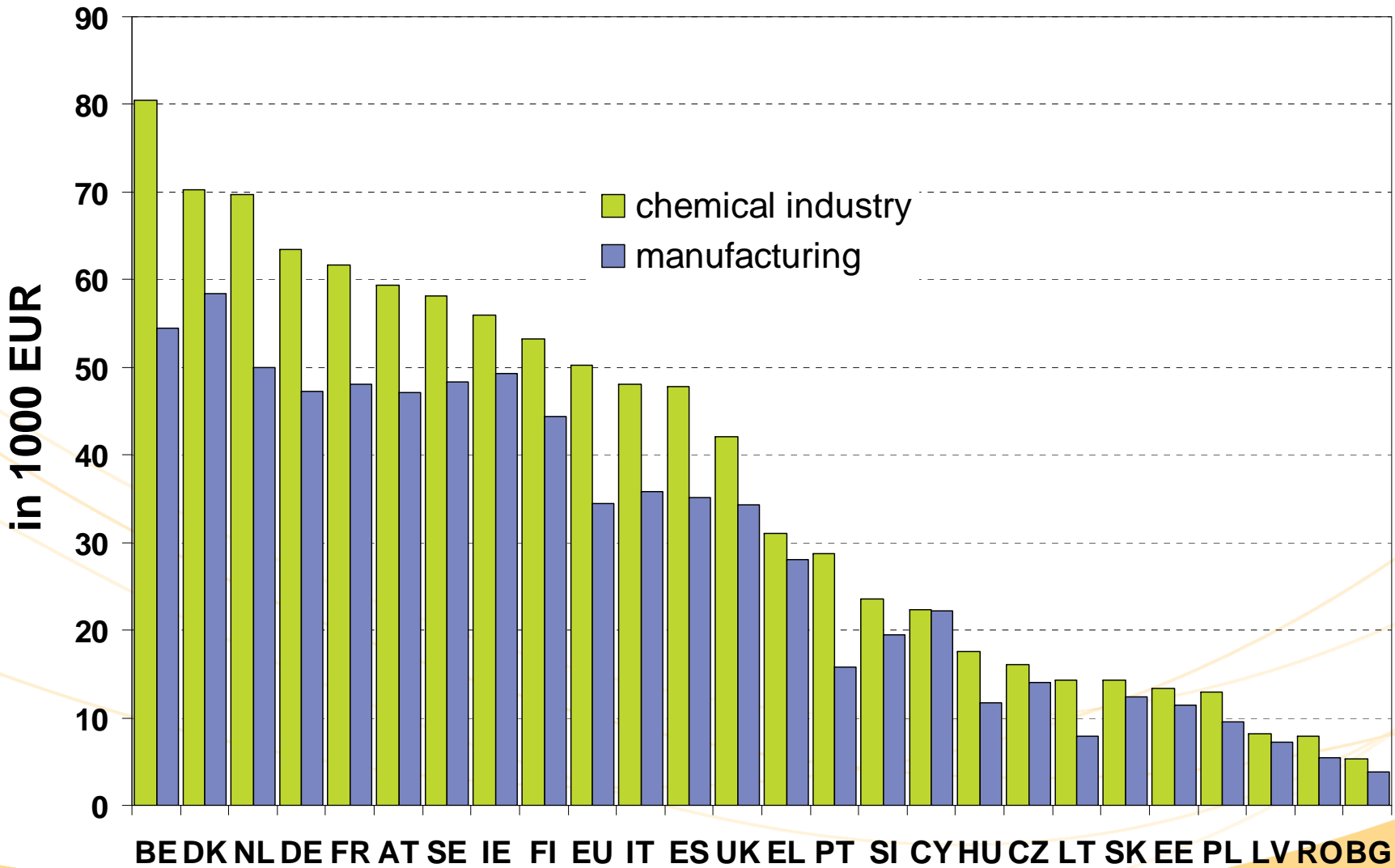
Key factors of competitiveness for the chemical industry

Apparent labour productivity, 2009



FR: estimates. RO: provisional. LU, MT: not available or confidential.

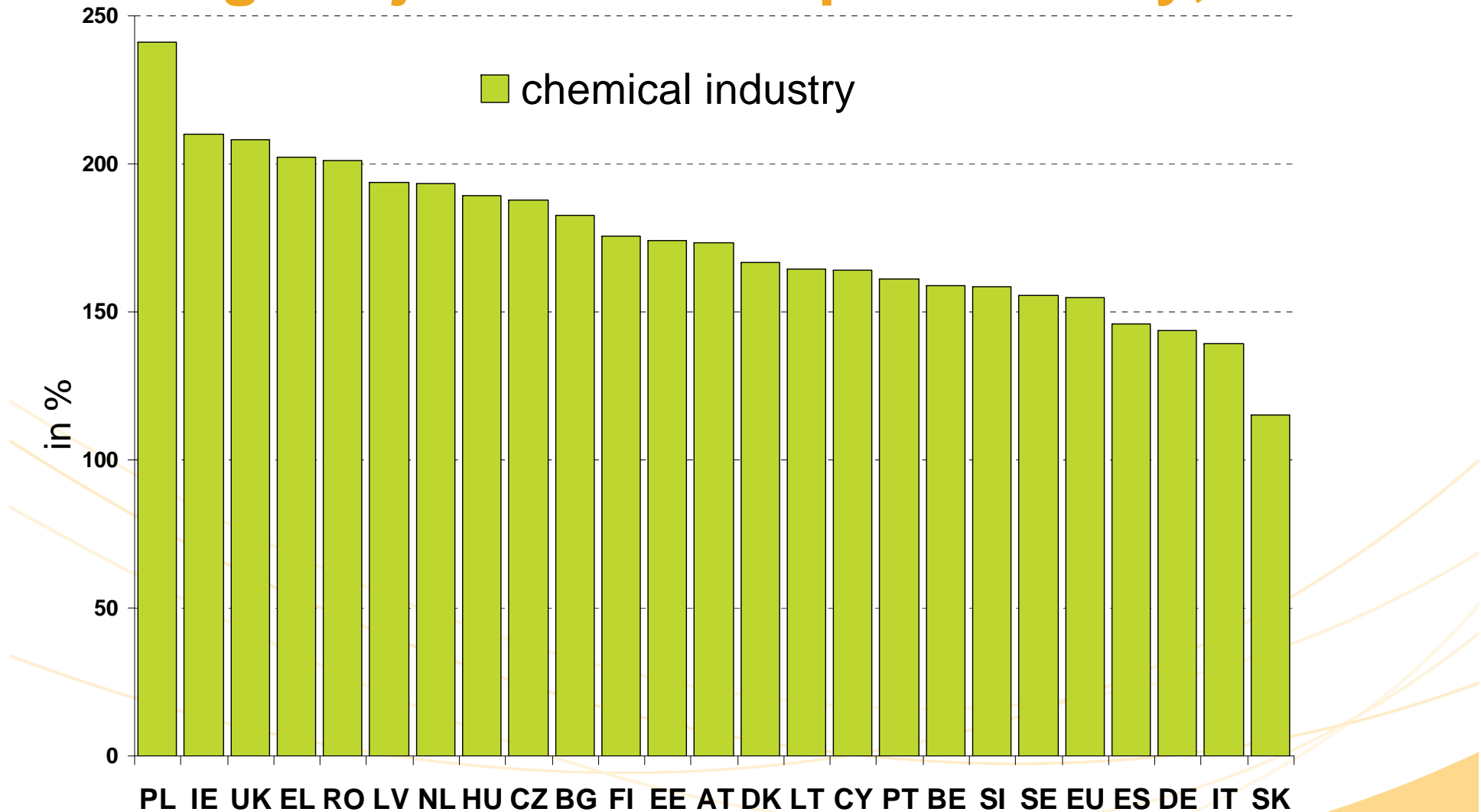
Labour cost per employee



RO: provisional. LU, MT: not available or confidential.



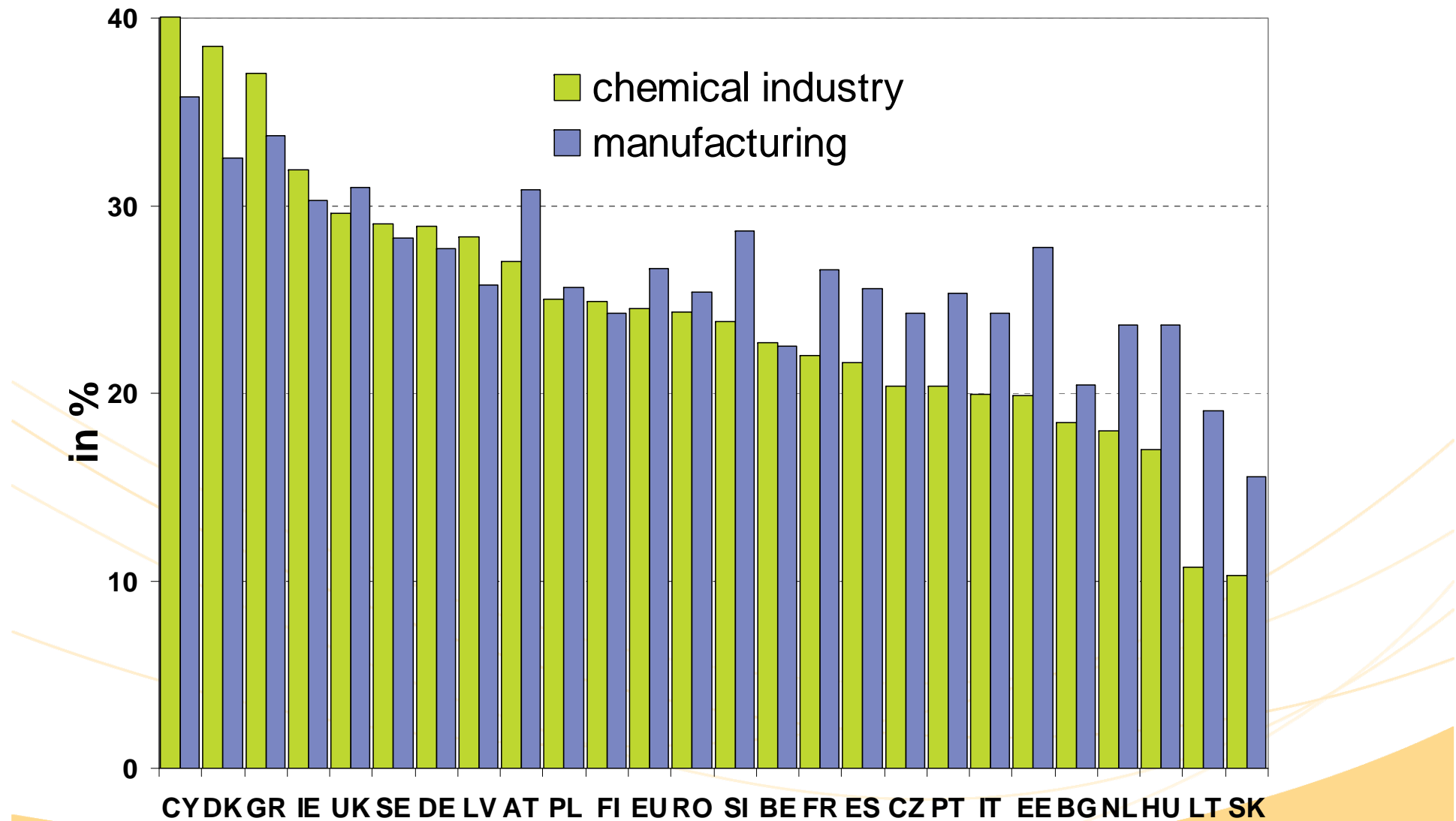
Wage adjusted labour productivity, 2009



RO: provisional. FR, LU, MT: not available or confidential.

Wage adjusted labour productivity: $(\text{value added}/\text{number of persons employed}) / (\text{personnel costs}/\text{number of employees})$

Profitability : Gross operating rate, 2009



CY DK GR IE UK SE DE LV AT PL FI EURO SI BE FR ES CZ PT IT EE BG NL HU LT SK
 RO: provisional. LU, MT: not available or confidential.

Gross operating rate: gross operating surplus divided by turnover

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Production value by products, EU-27, 2010

TOP 5 products:

Biofuels (diesel substitute), with >11.7 bn €

Polypropylene, in primary forms with >8.4 bn €

Unsaturated acyclic hydrocarbons; ethylene with >8.0 bn €

Beauty, make-up and skin care preparations ... with >7.3 bn €

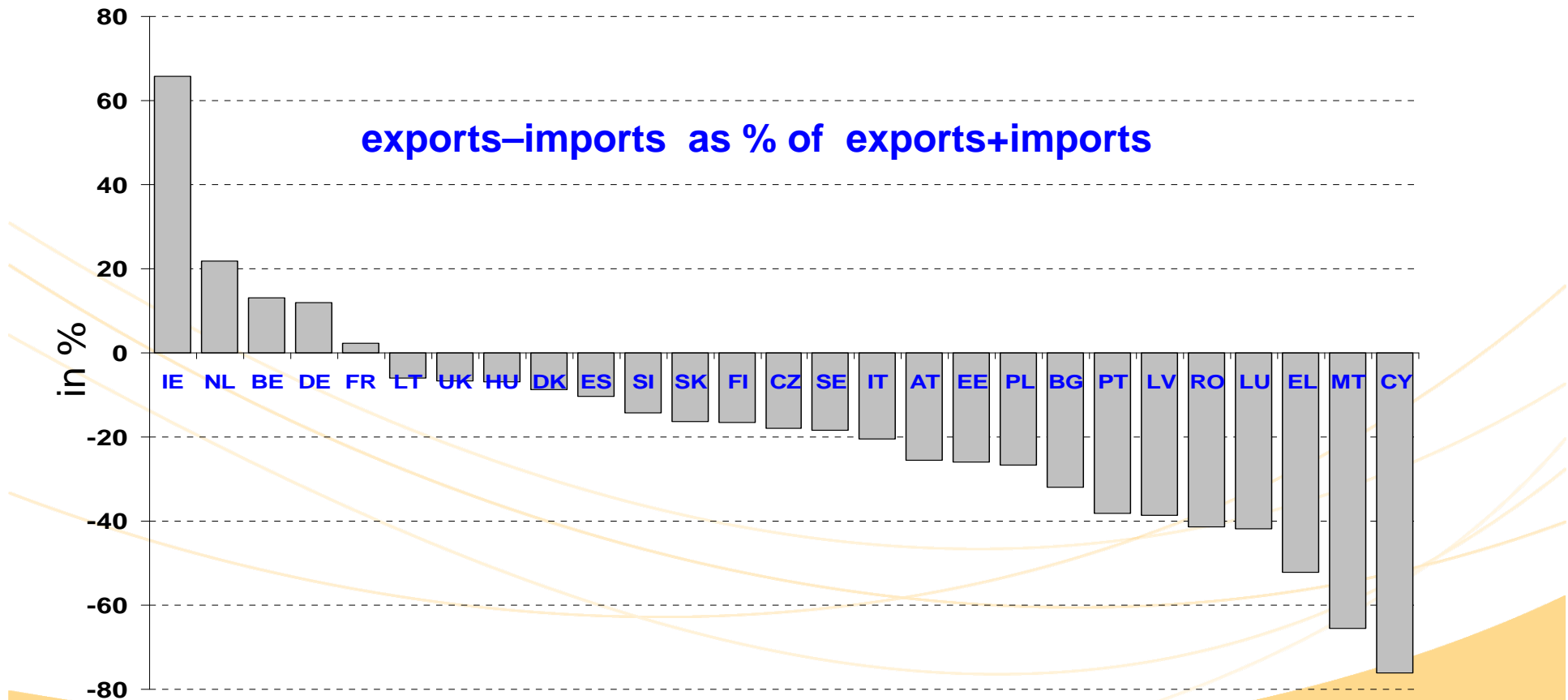
Washing preparations and cleaning preparations ... with 6.0 bn €

Trade performance in chemical products, 2010

EU-27 level: imports of 75 bn €

exports of 108 bn €

trade surplus of 33 bn €

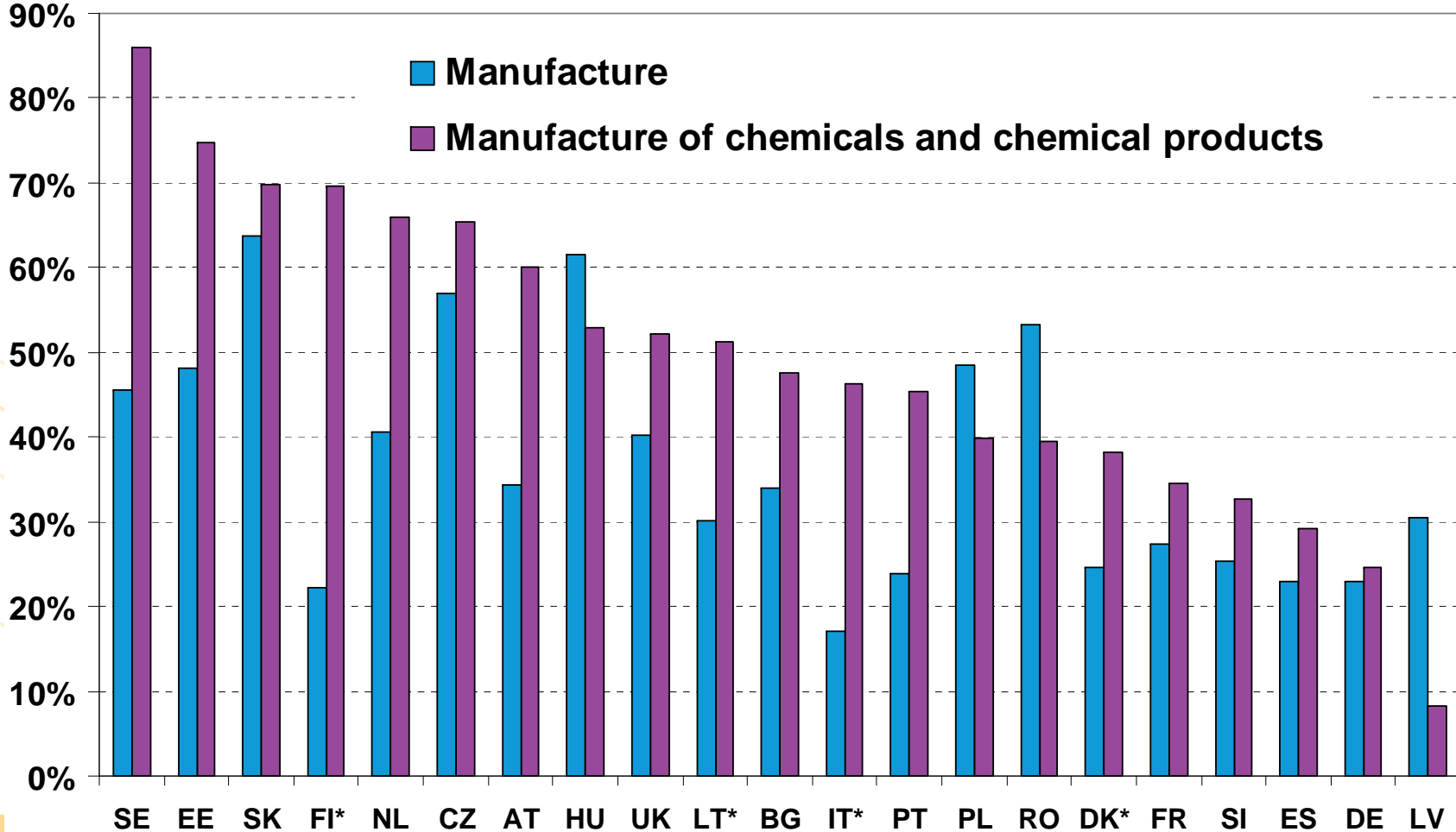


Trade surplus of DE, IE, NL in absolute terms: > 15 bn Euro

Share of value added generated by foreign-controlled enterprises, 2009

at EU level: 29% for manufacturing (section C)
 39% for manufacturing of chemicals (NACE division C20)

at MS level:



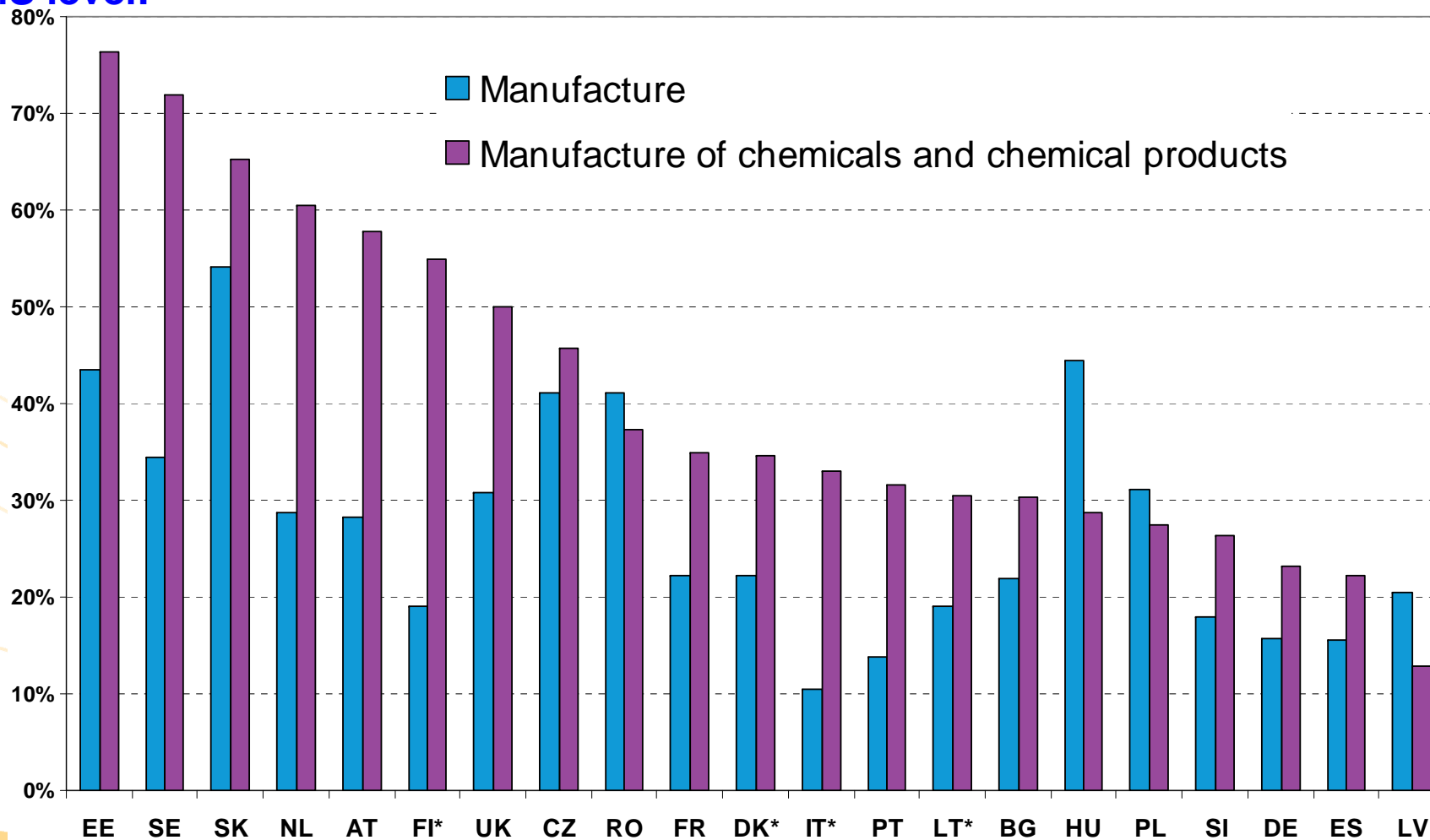
*2008 data ; IE, EL, BE, MT, CY, LU data not available (or confidential), CZ provisional data

Share of employment generated by foreign-controlled enterprises, 2009

at EU level: 23% for manufacturing (section C)

35% for manufacturing of chemicals (NACE division C20)

at MS level:



*2008 data; IE, EL, BE, MT, CY, LU data not available (or confidential), CZ provisional data.

Sources

Eurostat: Structural Business Statistics (SBS)
Short term statistics (STS)
International Trade statistics (COMEXT)
Industrial product statistics (PRODCOM)
Inward Foreign Affiliates Statistics (iFATS)

OECD: Structural Analysis Database (STAN)

Thank you for your attention