

13 December 2013

Industrial Companies Survey Year 2012

Industrial turnover decreases 0.7% in the year 2012 and stands at 570,984 million euros

The petroleum industry registers the highest increase in turnover, an 18.8%, while the branch of non-metallic mineral products presents the highest decrease, an -18.0%

Sales to countries outside of the European Union grow 14.8% as compared with 2011, increasing the turnover abroad from 26.9% to 28.3%

The turnover for companies in the industry sector¹ reached 570,984 million euros in 2012, with a decrease of 0.7%, as compared with the previous year.

The number of companies in the sector was reduced by 6.0% and employed staff by 6.2% as compared with 2011.

Main variables. Year 2012

Variables	Million euros (*)	Annual variation (%)
Economic variables		
- Turnover	570,984	-0.7
- Purchases and work carried out by other companies	382,774	-0.2
- External services	74,395	-1.7
- Personnel expenditure	71,108	-4.8
- Investment in tangible assets	21,184	2.9
- Gross added value at factor cost	125,417	-5.8
Companies and employed personnel		
- Number of companies	121,576	-6.0
- Employed personnel (annual average)	1,922,272	-6.2

* Except number of companies and personnel

¹ The target population of the survey is the companies that have at least one wage-earning person whose main activity is described in Sections B and E of CNAE-2009.

Results by activity section

79.3% of the total invoicing of the sector in 2012 corresponded to the *Manufacturing industry* and a 17.3% to companies of *Electricity, gas, steam and air conditioning supply*.

The total turnover of the *Manufacturing Industry* registered a decrease of 2.7% as compared with the previous year, whereas that of the companies of *Electricity, gas, steam and air conditioning supply*, increased by 9.8%.

Regarding employment, the *Manufacturing Industry* employed more than 1.74 million persons, which accounted for 90.6% of the total employed personnel of the sector and represented decrease of 6.5% as compared with the previous year.

Turnover and persons employed by activity section. Year 2012.

Activity section	Turnover			Employed personnel		
	Million euros	% over the total	Annual variation (%)	Annual average	% over the total	Annual variation (%)
Mining and quarrying	4,254	0.7	-7.0	24,239	1.3	-9.7
Manufacturing industry	453,037	79.3	-2.7	1,741,383	90.6	-6.5
Electricity, gas, steam and air conditioning supply	98,706	17.3	9.8	39,180	2.0	-5.8
Water supply, sewerage, waste management and remediation activities	14,987	2.6	-1.2	117,470	6.1	-0.5
TOTAL	570,984	100.0	-0.7	1,922,272	100.0	-6.2

Results by branch of activity

The branches of activity with the greatest contribution to the total turnover in 2012 were *Food products* (15.1%), *Electric power generation, transmission and distribution* (12.8%), and *Petroleum industry* (10.2%).

The branches that saw the greatest increase in their invoicing as compared with the previous year were *Petroleum industry* (18.8%) and *Electric power generation, transmission and distribution* (10.6%).

Conversely, the branches that saw the greatest decreases were *Non-metallic mineral products* (-18.0%) and *Wood and products of wood and cork, except furniture* (-13.8%).

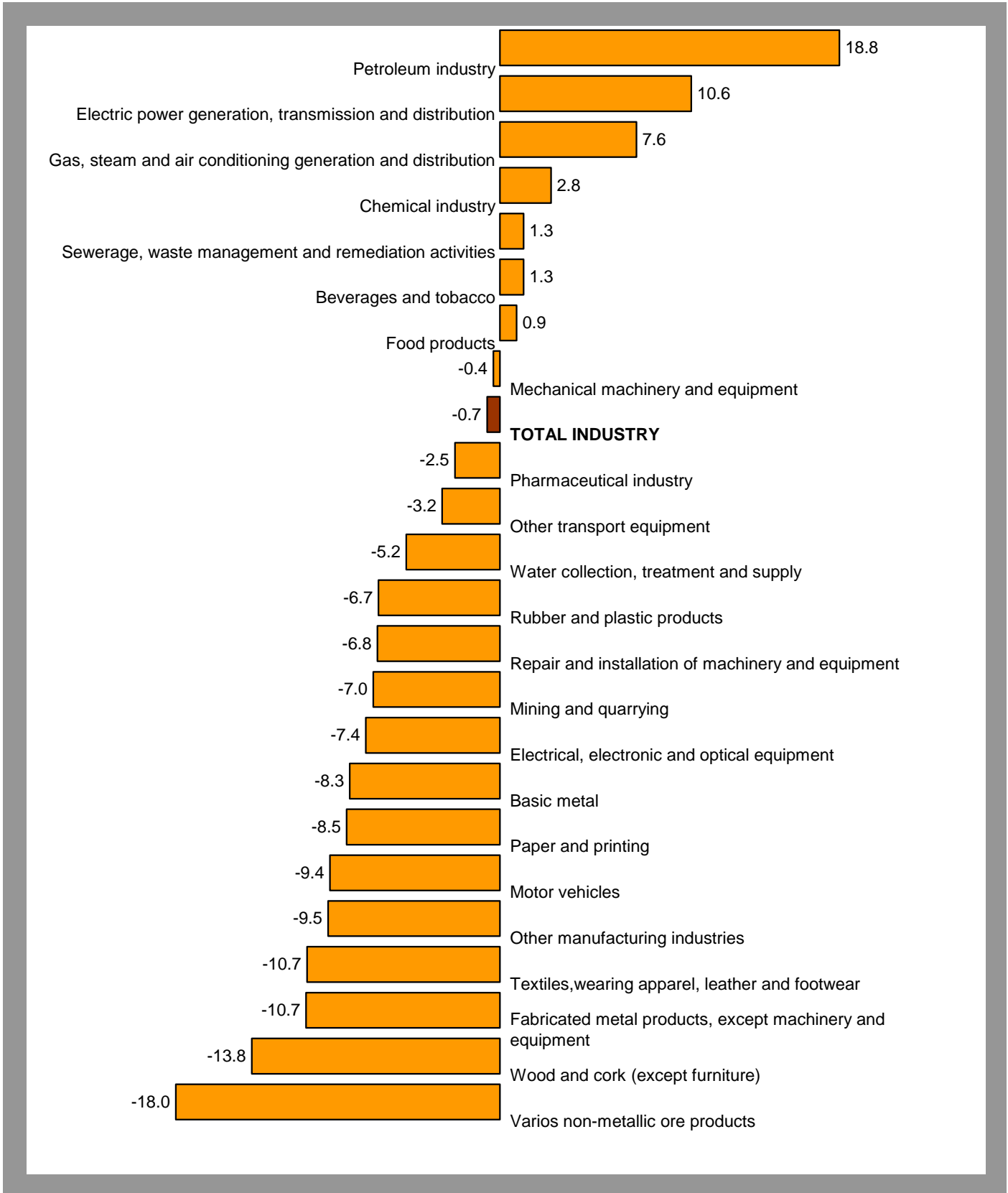
In terms of employment, the branches of activity that employed the highest percentage of persons were *Food products* (16.0%), *Manufacture of fabricated metal products, except machinery and equipment* (11.6%), and *Motor vehicles* (7.0%).

Distribution (%) of turnover by size of the company and branch of activity. Year 2012

Branch of activity	Micro company (less than 10 workers)	Small company (between 10 and 49 workers)	Medium sized company (between 50 and 249 workers)	Large company (250 or more workers)
Mining and Quarrying	10.3	29.8	30.0	29.9
Manufacturing industry				
- Food products	8.2	22.3	31.7	37.7
- Beverages and tobacco	9.6	19.9	17.5	52.9
- Textiles, wearing apparel, leather and footwear	17.8	40.0	29.6	12.7
- Wood and cork (except furniture)	26.0	36.9	22.2	14.9
- Paper and printing	9.4	22.2	31.1	37.2
- Petroleum industry	0.3	0.2	(1)	99.4
- Chemical industry	3.0	13.1	30.7	53.3
- Pharmaceutical industry	0.3	2.0	16.8	80.9
- Rubber and plastic products	4.9	23.6	33.9	37.7
- Various non-metallic ore products	9.2	24.4	33.5	33.0
- Basic Metals	1.6	10.5	26.4	61.4
- Fabricated metal products, except machinery and equipment	16.6	35.2	32.1	16.1
- Electrical, electronic and optical equipment	3.8	14.1	26.6	55.5
- Mechanical machinery and equipment	6.3	28.3	33.6	31.8
- Motor vehicles	0.6	2.5	11.6	85.3
- Other transport equipment	0.7	3.8	20.4	75.0
- Other manufacturing industries	23.1	36.0	24.2	16.8
- Repair and installation of machinery and equipment	19.7	29.1	27.4	23.9
Electricity, gas, steam and air conditioning supply				
- Electric power generation, transmission and distribution	24.1	6.3	10.6	59.0
- Gas, steam and air conditioning generation and distribution	17.9	8.2	36.7	37.2
Water supply, sewerage, waste management and remediation activities				
- Water collection, treatment and supply	11.1	13.0	23.7	52.2
- Sewerage, waste management and remediation activities	9.7	22.3	26.2	41.8
TOTAL	9.2	15.0	22.5	53.3

⁽¹⁾ For confidentiality reasons, these are grouped within the previous section

Annual variation (%) in industrial invoicing by branch of activity. Year 2012



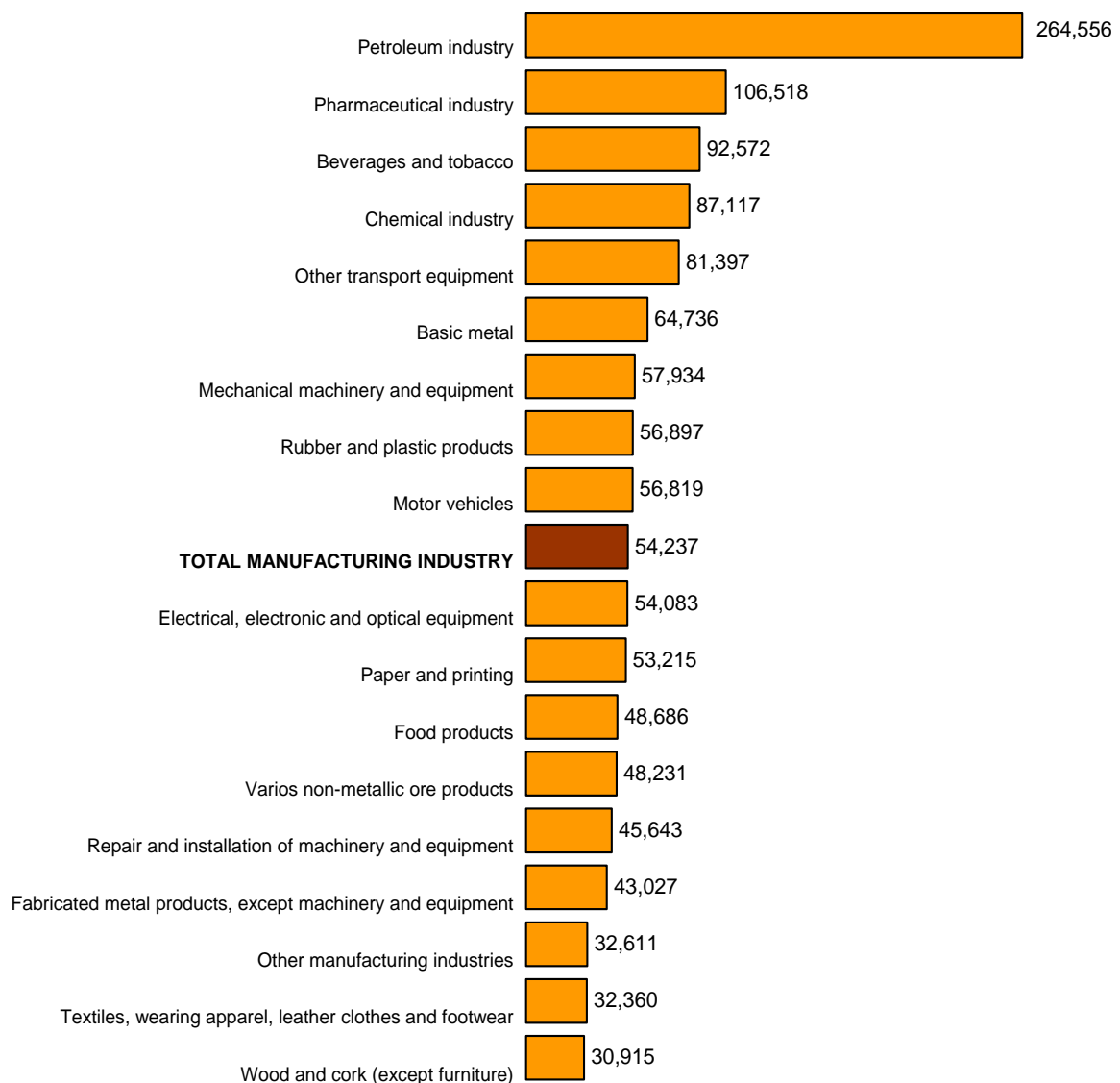
Productivity in the manufacturing industry

The productivity (value added per person employed) in the manufacturing industry was 54,237 euros in 2012, that is, 1.5% less than in the previous year.

The *Petroleum industry* registered the greatest productivity, with 264,556 euros per person employed, 14.5% less than in 2011. Following *Pharmaceutical Industry* (106,518 euros) and *Beverages and tobacco* (92,572).

In turn, the sectors that registered the lowest productivity were *Wood and cork (except furniture)* (30,915 euros), *Textiles, wearing apparel, leather clothes and footwear* (32,360) and *Other manufacturing industries* (32,611).

Productivity (in euros) by branch of activity in the manufacturing industry. Year 2012



Geographical destination of the sales

71.7% of the sales of the industrial sector's companies in 2012 were within Spain, 18.4% were to European Union (EU) countries, and nearly 10% were to the rest of the world.

The branches of activity with the highest percentage of sales outside Spain were *Motor vehicles* (63.4%), *Other transport equipment* (60.7%) and *Pharmaceutical Industry* (51.0%).

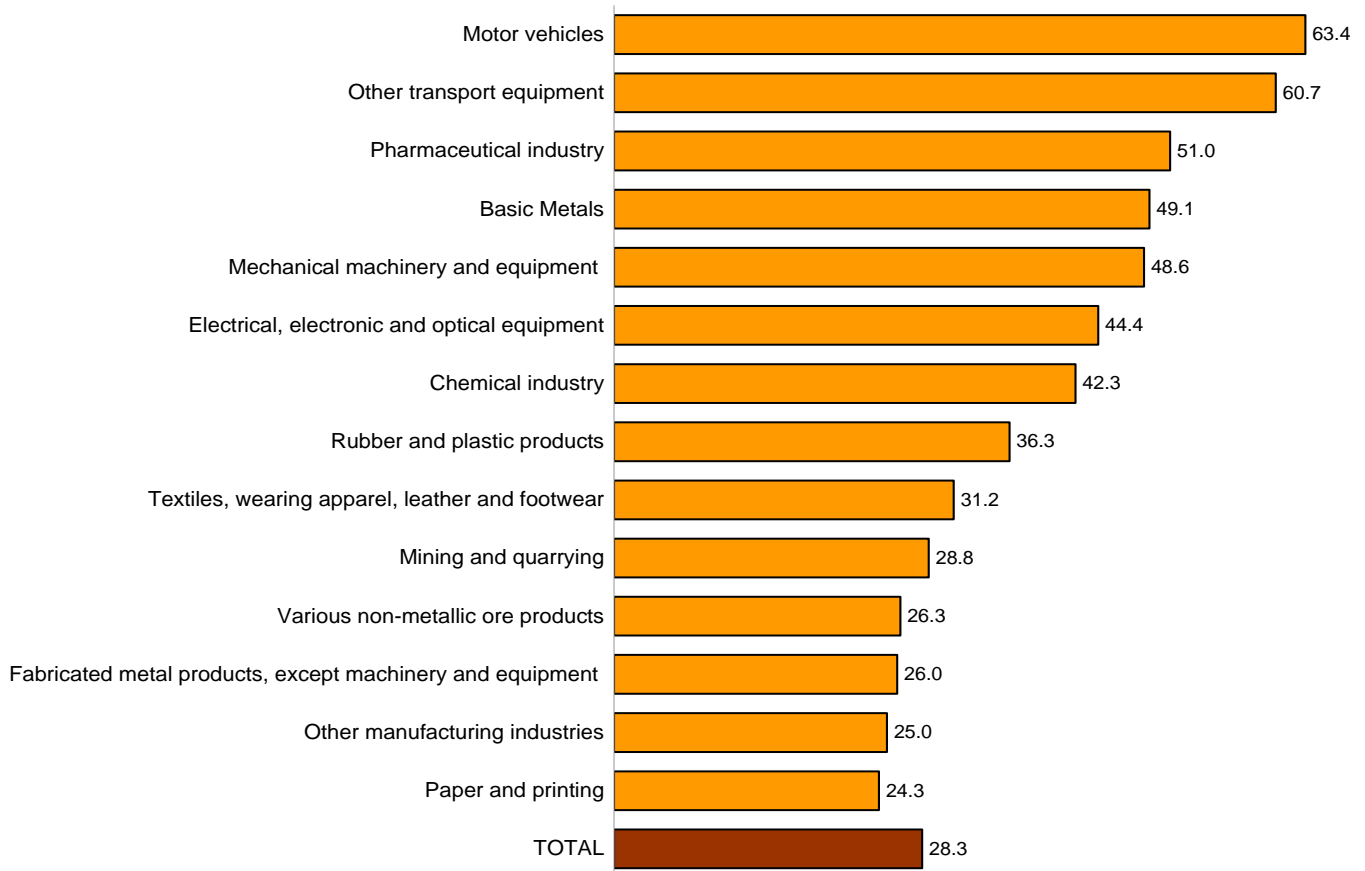
In turn, *Water supply, sewerage, waste management and remediation activities* and *Electricity, gas, steam and air conditioning supply* registered percentages lower than the 10%.

Sales outside Spain by branch of industrial activity. Year 2012

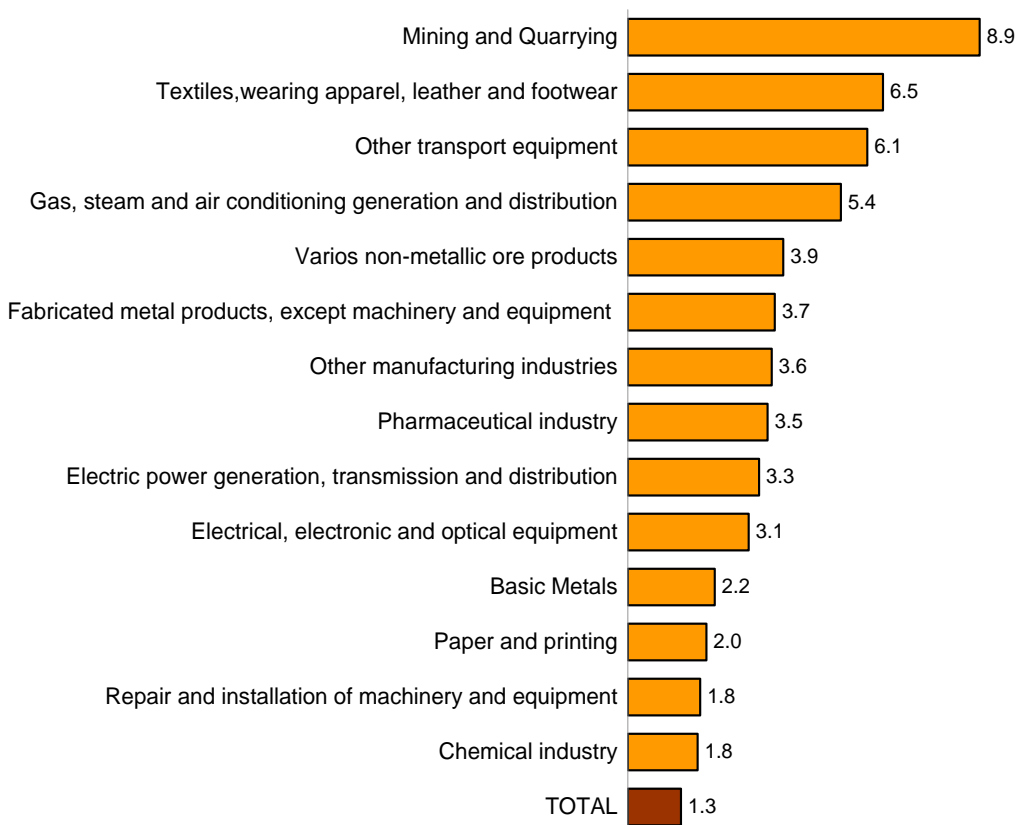
Branch of activity	Sales outside Spain		
	Million euros	% over the total sales	Difference between the % 2012-2011
Motor vehicles	30,593	63.4	0.9
Other transport equipment	6,473	60.7	6.1
Pharmaceutical industry	7,120	51.0	3.5
Basic Metals	14,379	49.1	2.2
Mechanical machinery and equipment	8,570	48.6	1.4
Electrical, electronic and optical equipment	8,490	44.4	3.1
Chemical industry	16,704	42.3	1.8
Rubber and plastic products	6,463	36.3	1.5
Textiles, wearing apparel, leather and footwear	4,130	31.2	6.5
Mining and quarrying	1,227	28.8	8.9
Various non-metallic ore products	4,117	26.3	3.9
Fabricated metal products, except machinery and equipment	7,413	26.0	3.7
Other manufacturing industries	2,132	25.0	3.6
Paper and printing	4,448	24.3	2.0
Wood and cork (except furniture)	1,048	19.5	1.5
Petroleum industry	11,301	19.5	0.9
Beverages and tobacco	2,983	17.7	-0.7
Food products	14,554	16.9	0.7
Repair and installation of machinery and equipment	1,034	16.5	1.8
Gas, steam and air conditioning generation and distribution	2,549	9.9	5.4
Electric power generation, transmission and distribution	4,914	6.7	3.3
Water supply, sewerage, waste management and remediation activities	464	4.9	-0.1
Water collection, treatment and supply	206	3.7	-0.2
TOTAL	161,312	28.3	1.3

In the graphs shown below, the activities with a percentage of sales in the foreign market above 20% during 2012 are shown, as well as the activities that have experienced the greatest increase in percentage of sales to the foreign market.

Branches of activity with the highest percentage of sales outside Spain. Year 2012



Branches of activity with the greatest increase in their participation in sales outside Spain (%). Year 2012-2011

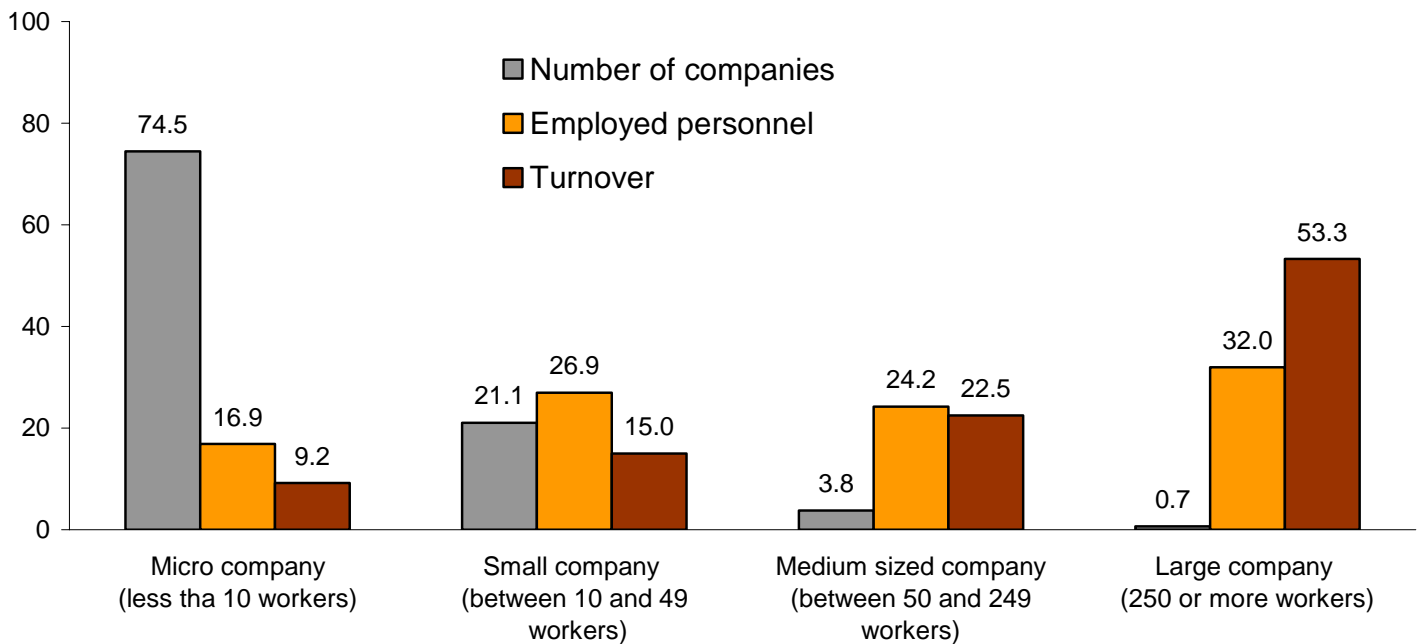


Results by company size

74.5% of industrial companies had less than 10 workers in 2012 and 21.1% had between 10 and 49. These companies occupied 43.8% of the personnel within the sector, but their invoicing scarcely accounted for a quarter of the total turnover of the sector.

In turn, large companies (with 250 or more workers), that represented 0.7% of the total industrial sector, invoiced 53.3% of the total sales in 2012.

Distribution (%) of the number of companies, employed personnel and turnover by size of the company. Year 2012



In four branches of activity, companies with less than 50 workers generated more than 50% of turnover. These branches were *Wood and cork (except furniture), Other manufacturing industries, Textiles, wearing apparel, leather and footwear and Fabricated metal products, except machinery and equipment.*

Distribution (%) of turnover by size of the company and branch of activity. Year 2012

Branch of activity	Micro company (less than 10 workers)	Small company (between 10 and 49 workers)	Medium sized company (between 50 and 249 workers)	Large company (250 or more workers)
Mining and Quarrying	10.3	29.8	30.0	29.9
Manufacturing industry				
- Food products	8.2	22.3	31.7	37.7
- Beverages and tobacco	9.6	19.9	17.5	52.9
- Textiles, wearing apparel, leather and footwear	17.8	40.0	29.6	12.7
- Wood and cork (except furniture)	26.0	36.9	22.2	14.9
- Paper and printing	9.4	22.2	31.1	37.2
- Petroleum industry	0.3	0.2	(1)	99.4
- Chemical industry	3.0	13.1	30.7	53.3
- Pharmaceutical industry	0.3	2.0	16.8	80.9
- Rubber and plastic products	4.9	23.6	33.9	37.7
- Various non-metallic ore products	9.2	24.4	33.5	33.0
- Basic Metals	1.6	10.5	26.4	61.4
- Fabricated metal products, except machinery and equipment	16.6	35.2	32.1	16.1
- Electrical, electronic and optical equipment	3.8	14.1	26.6	55.5
- Mechanical machinery and equipment	6.3	28.3	33.6	31.8
- Motor vehicles	0.6	2.5	11.6	85.3
- Other transport equipment	0.7	3.8	20.4	75.0
- Other manufacturing industries	23.1	36.0	24.2	16.8
- Repair and installation of machinery and equipment	19.7	29.1	27.4	23.9
Electricity, gas, steam and air conditioning supply				
- Electric power generation, transmission and distribution	24.1	6.3	10.6	59.0
- Gas, steam and air conditioning generation and distribution	17.9	8.2	36.7	37.2
Water supply, sewerage, waste management and remediation activities				
- Water collection, treatment and supply	11.1	13.0	23.7	52.2
- Sewerage, waste management and remediation activities	9.7	22.3	26.2	41.8
TOTAL	9.2	15.0	22.5	53.3

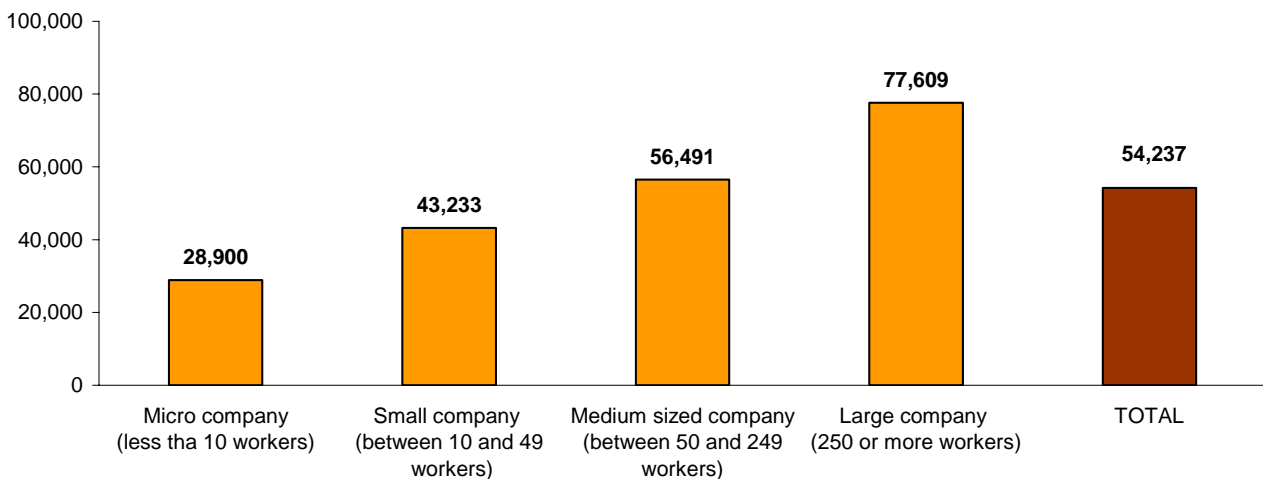
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Size of the company and productivity within the manufacturing industry

For large companies (with 250 or more workers), the average productivity was 77,609 euros in 2012. These large companies were more common in the *Petroleum industry*, *Pharmaceutical Industry* and *Motor vehicles*.

In contrast, companies with less than 10 workers registered the lowest productivity, with 28,900 euros.

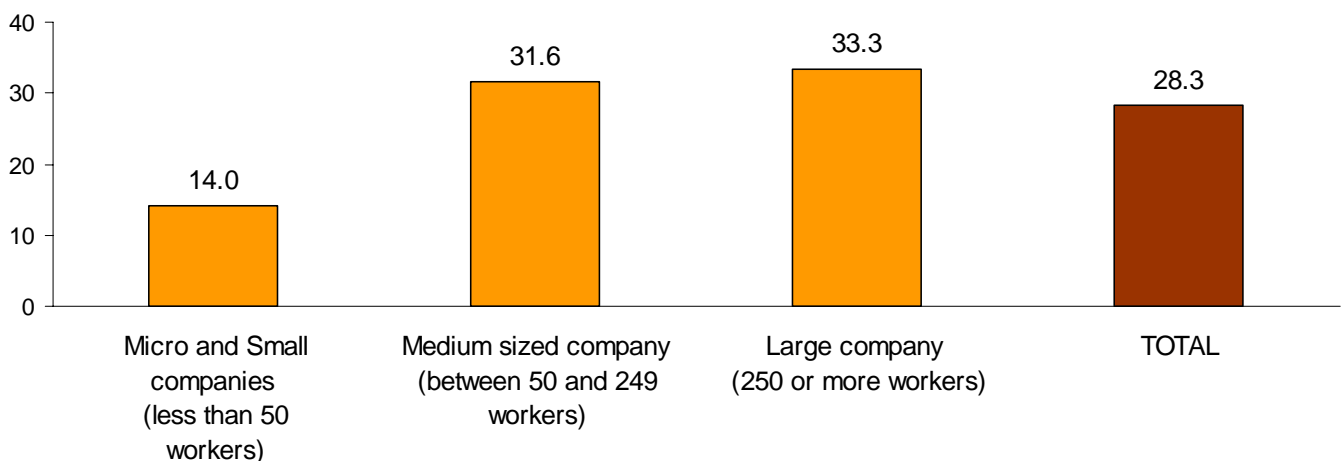
Productivity (in euros) in the manufacturing industry by size of the company. Year 2012



Size of the company and sales outside Spain

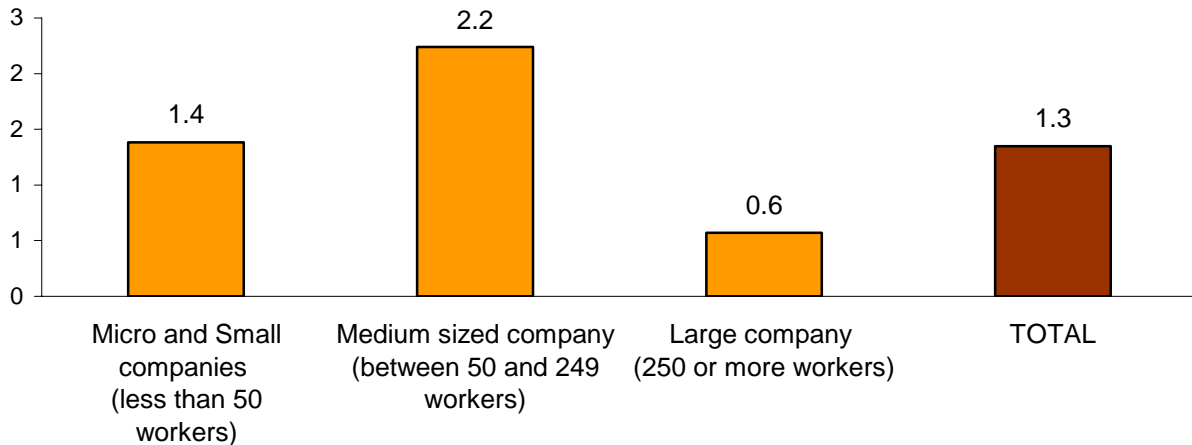
Industrial companies with 50 or more workers were those that were most likely to export, since the destination of more than 30% of their invoicing is abroad.

Industrial turnover in the foreign market by size of the companies. Percentage compared with the total turnover of each section of workers. Year 2012



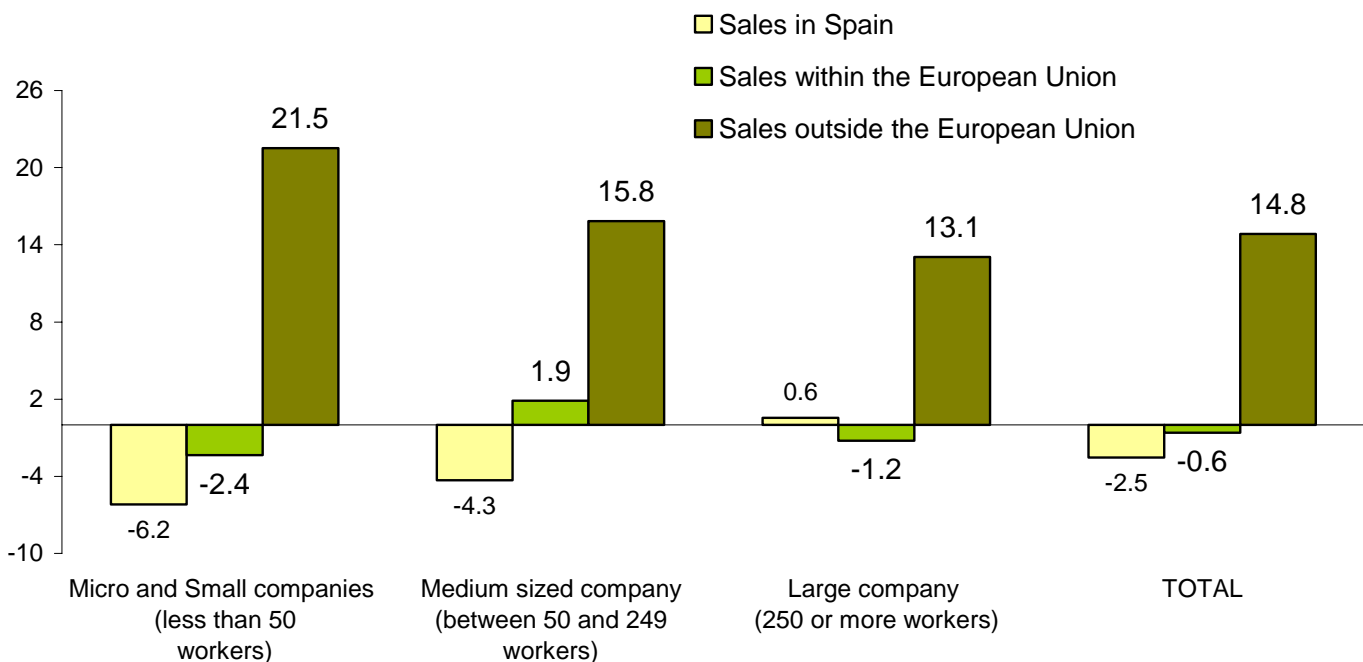
Medium sized companies (between 50 and 249 workers) were those that registered a greater dynamism abroad, with an increase of 2.2 points in their invoicing as compared with the previous year.

Variation in the participation in sales (%) outside Spain, by size of the company. Year 2012-2011



Sales in countries outside the European Union registered a growth of 14.8% as compared with 2011. This market showed an increase in companies of all sizes, being specially remarkable the variation of companies with less than 50 workers, of 21.5%.

Annual variation (%) of sales in the industrial sector by geographical destination, by size of the company. Year 2012



Results by Autonomous Community for the manufacturing industry.

The Autonomous Communities with the greatest participation in industrial turnover in the year 2012 were Cataluña (22.2%), Andalucía (12.7%) and Comunidad de Madrid (10.5%).

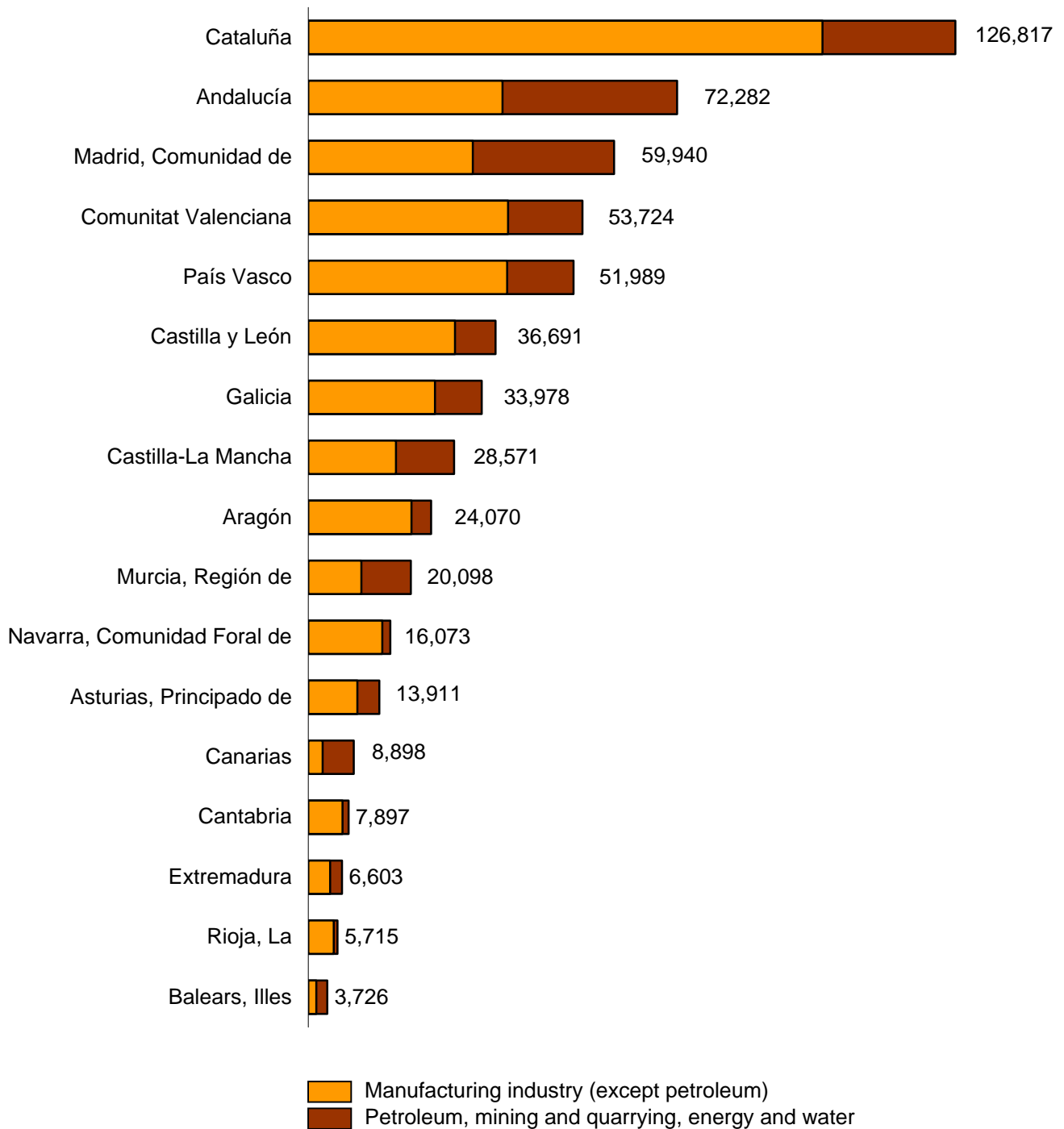
In turn, those with the least weight in turnover were Illes Balears (0.7%), La Rioja (1.0%) and Extremadura (1.2%).

Regarding employment, all Autonomous Communities reduced their employed personnel as compared with 2011. The lowest decrease was registered in País Vasco (-3.2%), and the greatest in Canarias (-10.1%).

Turnover and employed personnel in the industrial sector by Autonomous Community. Year 2012

Autonomous Community	Turnover			Employed personnel		
	Million euros	% over the total	Annual variation (%)	Annual average	% over the total	Annual variation (%)
Andalucía	72,282	12.7	9.6	189,766	9.9	-8.3
Aragón	24,070	4.2	-3.7	85,461	4.4	-4.5
Asturias, Principado de	13,911	2.4	-6.0	50,342	2.6	-6.8
Balears, Illes	3,726	0.7	0.2	20,404	1.1	-7.5
Canarias	8,898	1.6	-1.0	31,047	1.6	-10.1
Cantabria	7,897	1.4	-2.7	30,397	1.6	-8.8
Castilla y León	36,691	6.4	0.6	119,633	6.2	-7.2
Castilla-La Mancha	28,571	5.0	9.5	88,612	4.6	-6.5
Cataluña	126,817	22.2	-1.8	421,106	21.9	-4.6
Comunitat Valenciana	53,724	9.4	-3.0	220,295	11.5	-5.9
Extremadura	6,603	1.2	8.0	25,724	1.3	-7.0
Galicia	33,978	6.0	-0.8	128,076	6.7	-7.7
Madrid, Comunidad de	59,940	10.5	-4.1	179,899	9.4	-8.1
Murcia, Región de	20,098	3.5	15.7	61,648	3.2	-4.8
Navarra, Comunidad Foral de	16,073	2.8	-10.8	60,250	3.1	-7.7
País Vasco	51,989	9.1	-8.5	184,493	9.6	-3.2
Rioja, La	5,715	1.0	-9.5	25,119	1.3	-5.7
TOTAL	570,984	100.0	-0.7	1,922,272	100.0	-6.2

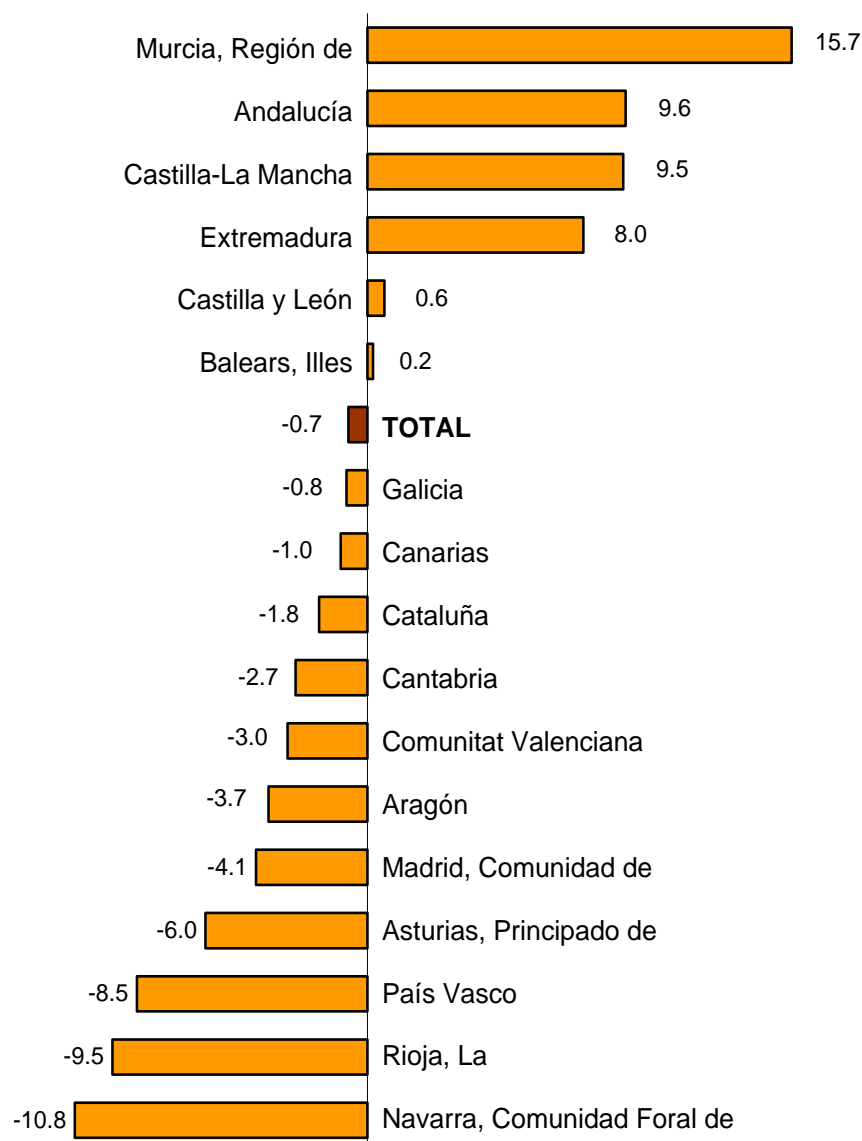
Turnover (million euros) in the industrial sector by Autonomous Community. Year 2012



Turnover increased in the Autonomous Communities with a significant weight of the petroleum and energy Industry as compared to 2011. The greatest increases were recorded in Región de Murcia (15.7%), Andalucía (9.6%), and Castilla-La Mancha (9.5%).

In turn, the Autonomous Communities that registered the greatest decreases in their invoicing were Comunidad Foral de Navarra (-10.8%), La Rioja (-9.5%) and País Vasco (-8.5%).

Annual variation (%) of turnover in the industrial sector by Autonomous Community. Year 2012



Methodological note

The Industrial Companies Survey is a structural survey published annually, addressed to companies with at least one employee whose main activity is described in the sections B and E of the National Classification of Economic Activities CNAE-2009. This classification includes the manufacturing industry, the extractive industry, electricity, gas and water supply and sewerage, waste management and remediation activities.

This operation provides information on the structural features of the companies that are mainly dedicated to each of the activities included in their scope. These features include the companies' size, their most relevant accounting data (turnover, purchases, personnel costs, etc.) and the structure of employment and investment.

The Industrial Companies Survey is addressed to a sample of around 40,000 units selected among a population of around 145,000, and provides representative results, which are detailed by activity, by Autonomous Community and by size of the company according to the number of workers.

For further information see the *Complete Methodology* of this survey at the INE website.

http://www.ine.es/en/metodologia/t05/t0530p048_en.htm

For further information see **INEbase-www.ine.es** All press releases at: **www.ine.es/prensa/prensa_en.htm**

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