

18 December 2014

**Industrial Companies Survey**  
Year 2013

**Industrial turnover decreases 2.5% in the year 2013 and stands at 562,351 million euros**

**Manufacture of motor vehicles registers the highest increase in turnover, 8.1%, while mining and quarrying presents the highest decrease, -15.8%**

**28.8% of sales of the industrial sectors were made to countries outside of the European Union, that is, 0.8 points more than in the previous year**

The turnover for companies in the industry sector reached 562,351 million euros in 2013, with a decrease of 2.5%, as compared to the previous year<sup>1</sup>.

The number of companies in the sector was reduced by 4.6% and so was employed staff by 3.9% as compared to 2012.

**Main variables. Year 2013**

<b>Variables</b>	<b>Value</b>	<b>Annual variation (%)<sup>1</sup></b>
<b>Economic variables (million euros)</b>		
Turnover	562,351	-2.5
Purchases and work carried out by other companies	372,765	-3.0
External services	72,624	-3.3
Personnel expenditure	70,107	-2.9
Investment in tangible assets	17,839	-16.3
Gross added value at factor cost	124,468	-3.4
<b>Companies and employed personnel</b>		
Number of companies	191,075	-4.6
Employed personnel (thousands of persons)	1,949	-3.9

<sup>1</sup> From the reference year 2013, the Industrial Companies Survey widened its population and territorial scope, extending the coverage to industrial companies without wage earners and incorporating companies from Ceuta and Melilla. Moreover, the coverage for waste management was improved and extended. In order to compare the results to the previous year, all annual variation rates were calculated according to comparable common scopes in 2012 and 2013.

## Results by activity section

79.5% of the total invoicing of the sector in 2013 corresponded to *Manufacturing industry* and 16.7% to companies of *Electricity, gas, steam and air conditioning supply*.

The turnover of *Manufacturing Industry* registered a decrease of 1.8% as compared to the previous year, whereas that of the companies of *Electricity, gas, steam and air conditioning supply* decreased by 6.1%.

Regarding employment, *Manufacturing industry* employed more than 1.735 million persons, which accounted for 89.0% of the total employed personnel of the sector and represented a 4.5% decrease as compared to the previous year.

## Turnover and personnel employed by activity section. Year 2013

Activity section	Turnover			Employed personnel		
	Million euros	% over the total	Annual variation (%)	Annual average	% over the total	Annual variation (%)
Mining and quarrying	3,609	0.6	-15.8	21,494	th	-13.4
Manufacturing industry	447,283	79.5	-1.8	1,735,169	89.0	-4.5
Electricity, gas, steam and air conditioning supply	93,795	16.7	-6.1	39,589	2.0	-4.8
Water supply, sewerage, waste management and remediation activities	17,663	3.1	4.8	152,941	7.8	7.2
<b>TOTAL</b>	<b>562,351</b>	<b>100.0</b>	<b>-2.5</b>	<b>1,949,194</b>	<b>100.0</b>	<b>-3.9</b>

## Results by branch of activity

The branches of activity with the greatest contribution to the total turnover in 2013 were *Food products* (15.5%), *Electric power generation, transmission and distribution* (12.1%), and *Petroleum industry* (9.4%).

The branches that registered the greatest increase in their invoicing as compared to the previous year were *Motor vehicles* (8.1%), *Sewerage, waste management and remediation activities* (5.6%) and *Textiles, wearing apparel, leather and footwear* (4.4%).

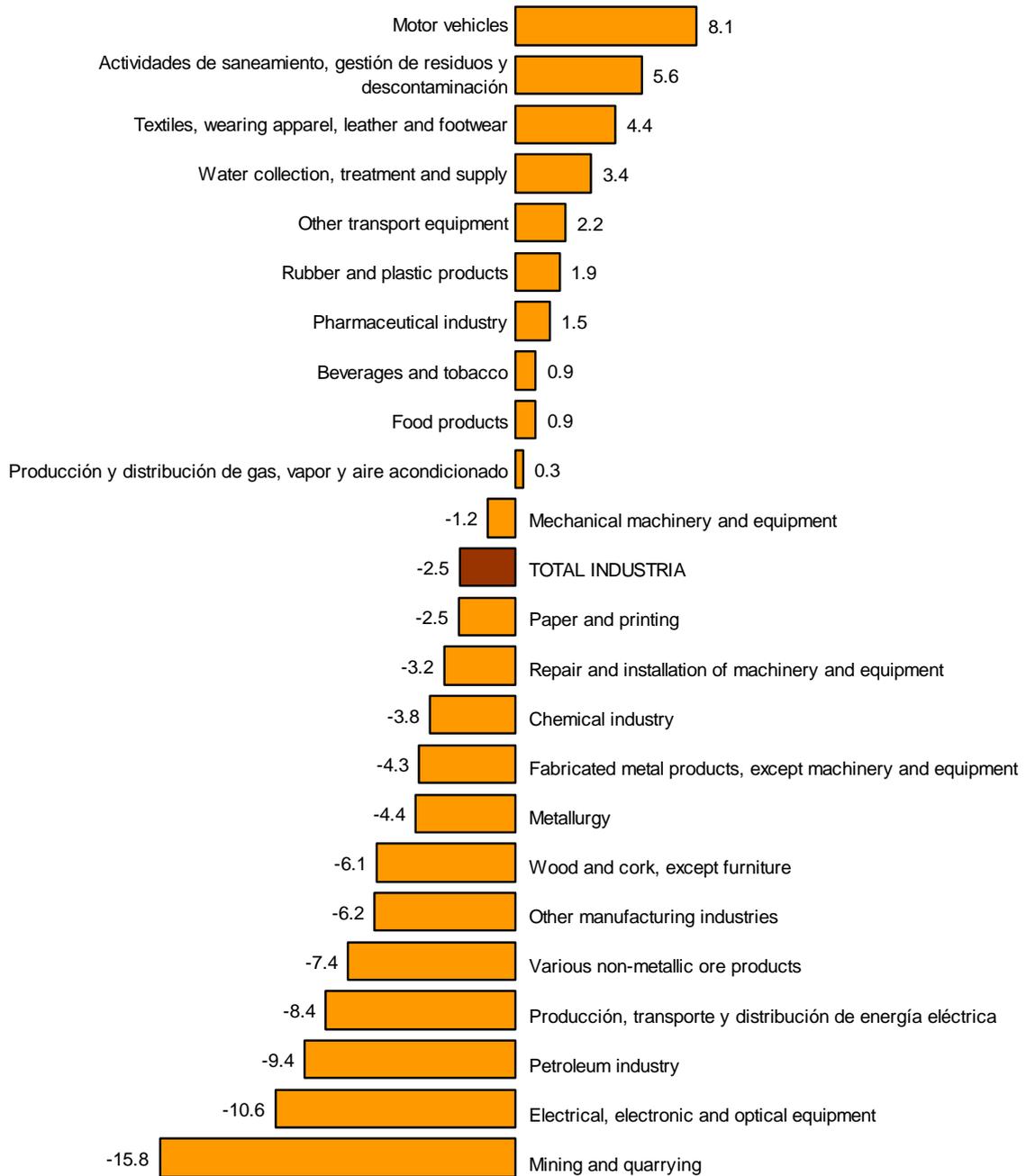
Conversely, the branches that registered the greatest decreases were *Mining and quarrying* (-15.8%) and *Electrical, electronic and optical equipment* (-10.6%).

In terms of employment, the branches of activity that employed the highest percentage of persons were *Food products* (15.9%), *Manufacture of fabricated metal products, except machinery and equipment* (11.5%), and *Motor vehicles* (6.8%).

**Turnover and personnel employed by branch of activity. Year 2013**

Branch of activity	Turnover			Employed personnel		
	Million euros	% over the total	Annual variation (%)	Annual average	% over the total	Annual variation (%)
<b>Mining and quarrying</b>	3,609	0.6	-15.8	21,495	1.1	-13.4
<b>Manufacturing industry</b>						
- Food products	87,172	15.5	0.9	309,664	15.9	-2.9
- Beverages and tobacco	17,099	3.0	0.9	48,181	2.5	-4.0
- Textiles, wearing apparel, leather and footwear	13,978	2.5	4.4	120,372	6.2	-1.5
- Wood and cork, except furniture	5,118	0.9	-6.1	48,028	2.5	-10.9
- Paper and printing	18,341	3.3	-2.5	105,613	5.4	-6.4
- Petroleum industry	52,602	9.4	-9.4	9,030	0.5	-3.9
- Chemical industry	38,049	6.8	-3.8	81,025	4.2	-1.1
- Pharmaceutical industry	14,178	2.5	1.5	36,992	1.9	0.5
- Rubber and plastic products	18,230	3.2	1.9	88,345	4.5	-0.9
- Various non-metallic ore products	14,566	2.6	-7.4	90,469	4.6	-12.1
- Metallurgy	28,005	5.0	-4.4	57,800	3.0	-4.8
- Fabricated metal products, except machinery and equipment	27,654	4.9	-4.3	224,647	11.5	-4.7
- Electrical, electronic and optical equipment	17,166	3.1	-10.6	83,203	4.3	-8.7
- Mechanical machinery and equipment	17,478	3.1	-1.2	96,924	5.0	-2.8
- Motor vehicles	52,150	9.3	8.1	131,837	6.8	-2.0
- Other transport equipment	10,919	1.9	2.2	40,419	2.1	-3.9
- Other manufacturing industries	8,228	1.5	-6.2	97,694	5.0	-8.0
- Repair and installation of machinery and equipment	6,351	1.1	-3.2	64,925	3.3	-7.7
<b>Electricity, gas, steam and air conditioning supply</b>						
- Electric power generation, transmission and distribution	68,007	12.1	-8.4	32,217	1.7	-7.2
- Gas, steam and air conditioning generation and distribution	25,788	4.6	0.3	7,372	0.4	6.3
<b>Water supply, sewerage, waste management and remediation activities</b>						
- Water collection, treatment and supply	5,852	1.0	3.4	35,277	1.8	0.2
- Sewerage, waste management and remediation activities	11,812	2.1	5.6	117,664	6.0	10.1
<b>TOTAL</b>	<b>562,351</b>	<b>100.0</b>	<b>-2.5</b>	<b>1,949,194</b>	<b>100.0</b>	<b>-3.9</b>

**Annual variation (%) in industrial invoicing by branch of activity. Year 2013**



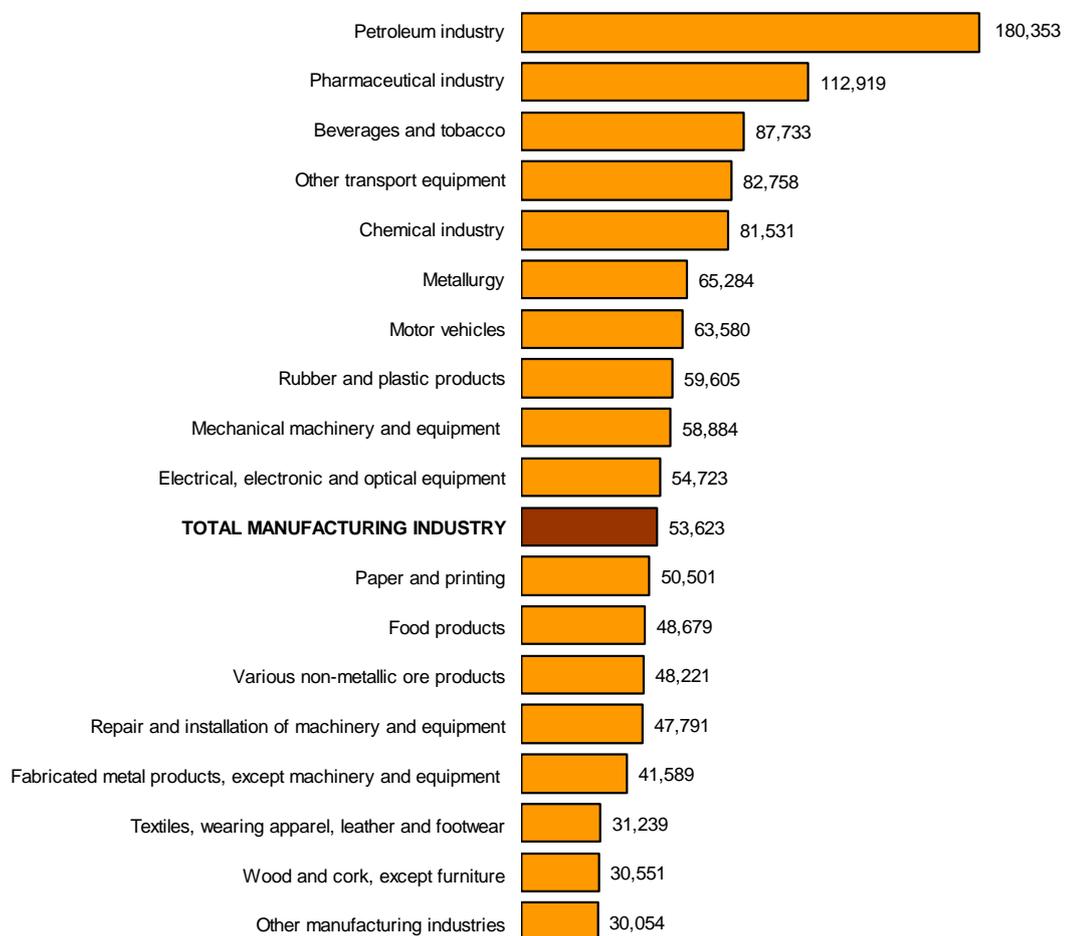
## Productivity in the manufacturing industry

The productivity (value added per person employed) in the manufacturing industry was 53,623 euros in 2013, that is, 2.2% more than in the previous year.

The *Petroleum industry* registered the greatest productivity, with 180,353 euros per person employed, followed by *Pharmaceutical Industry* (112,919 euros) and *Beverages and tobacco* (87,733).

In turn, the sectors that registered the lowest productivity were *Other manufacturing industries*<sup>2</sup> (30,054 euros per person), *Wood and cork, except furniture* (30,551 euros) and *Textiles, wearing apparel, leather clothes and footwear* (31,239).

### Productivity (in euros) by branch of activity in the manufacturing industry



<sup>2</sup> Other manufacturing industries includes manufacture of furniture, jewellery, bijouterie and related articles, sports goods, games and toys, medical and dental instruments and supply and manufacturing n.e.c.

## Geographical destination of the sales

71.2% of the sales of the industrial sector's companies in 2013 were within Spain, 19.0% were to European Union (EU) countries, and 9.8% were to the rest of the world.

The branches of activity with the highest percentage of sales outside Spain were *Other transport equipment* (71.7%), *Motor vehicles* (64.8%) and *Mechanical and machinery equipment* (53.3%).

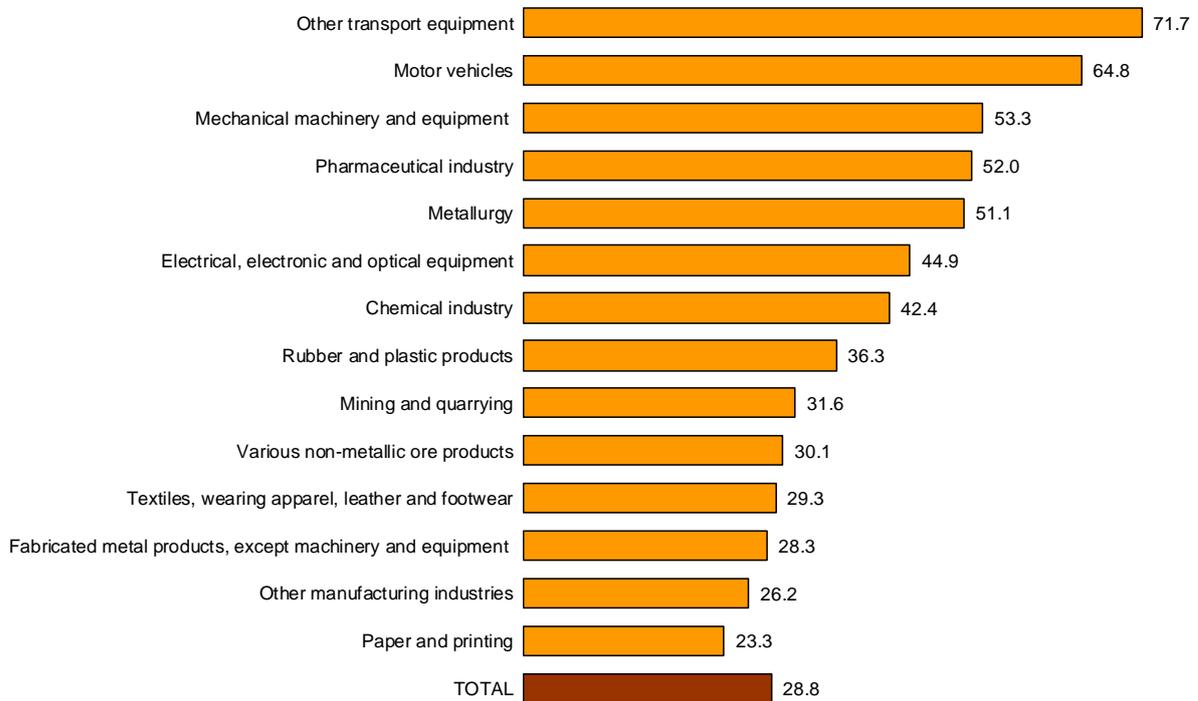
In turn, *Water supply, sewerage, waste management and remediation activities* and *Electricity, gas, steam and air conditioning supply* registered percentages lower than 10%.

### Sales outside Spain by branch of industrial activity. Year 2013

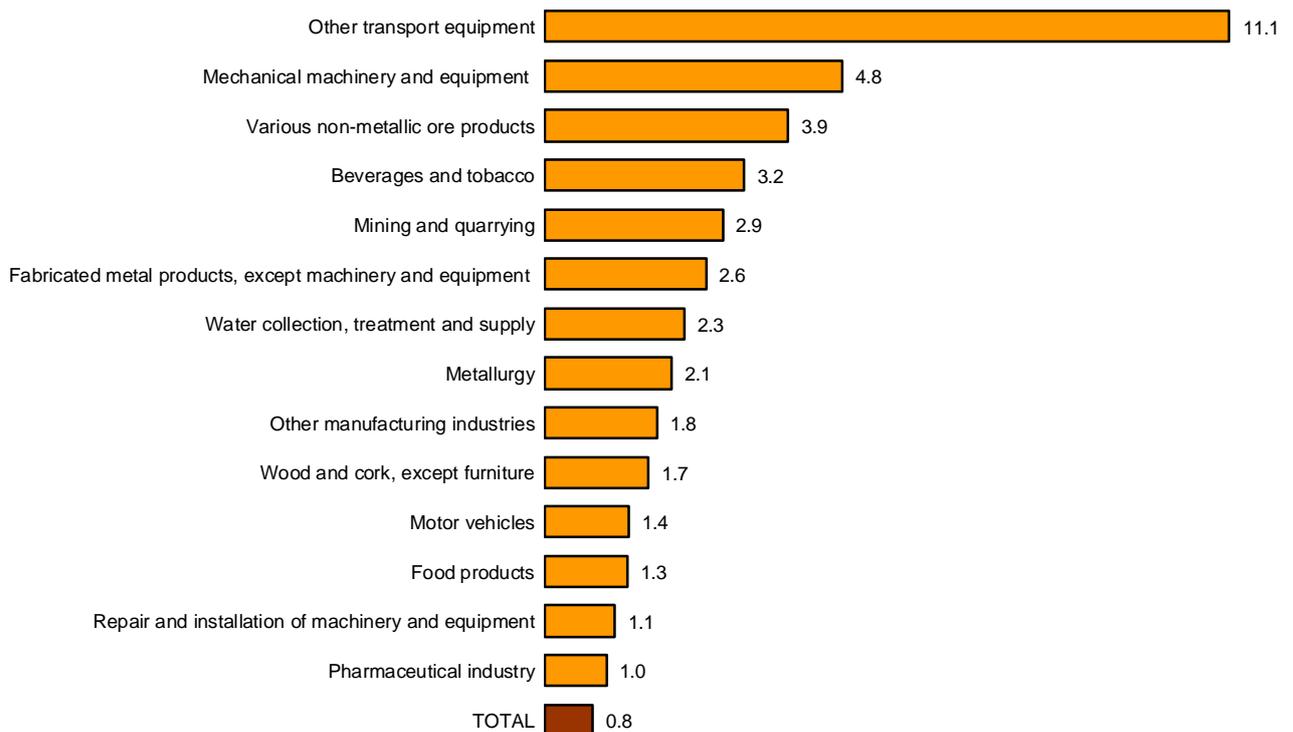
Activity branch	Sales outside Spain		
	Million euros	% over the total sales	Difference between the % 2013-2012
Other transport equipment	7,831	71.7	11.1
Motor vehicles	33,768	64.8	1.4
Mechanical machinery and equipment	9,322	53.3	4.8
Pharmaceutical industry	7,371	52.0	1.0
Metallurgy	14,322	51.1	2.1
Electrical, electronic and optical equipment	7,709	44.9	0.7
Chemical industry	16,149	42.4	0.2
Rubber and plastic products	6,619	36.3	0.1
Mining and quarrying	1,140	31.6	2.9
Various non-metallic ore products	4,390	30.1	3.9
Textiles, wearing apparel, leather and footwear	4,095	29.3	-1.7
Fabricated metal products, except machinery and equipment	7,818	28.3	2.6
Other manufacturing industries	2,154	26.2	1.8
Paper and printing	4,277	23.3	-0.4
Wood and cork, except furniture	1,074	21.0	1.7
Beverages and tobacco	3,579	20.9	3.2
Food products	15,862	18.2	1.3
Repair and installation of machinery and equipment	1,072	16.9	1.1
Petroleum industry	7,839	14.9	-4.6
Water collection, treatment and supply	345	5.9	2.3
Gas, steam and air conditioning generation and distribution	1,300	5.0	-4.9
Electric power generation, transmission and distribution	3,303	4.9	-1.8
Sewerage, waste management and remediation activities	450	3.8	-0.4
<b>TOTAL</b>	<b>161,788</b>	<b>28.8</b>	<b>0.8</b>

In the graphs shown below, the activities with the highest percentage of sales in the foreign market during 2013 are shown, as well as the activities that have experienced a high increase in percentage of exports.

**Activity branches with the greatest percentage of sales outside Spain. Year 2013**



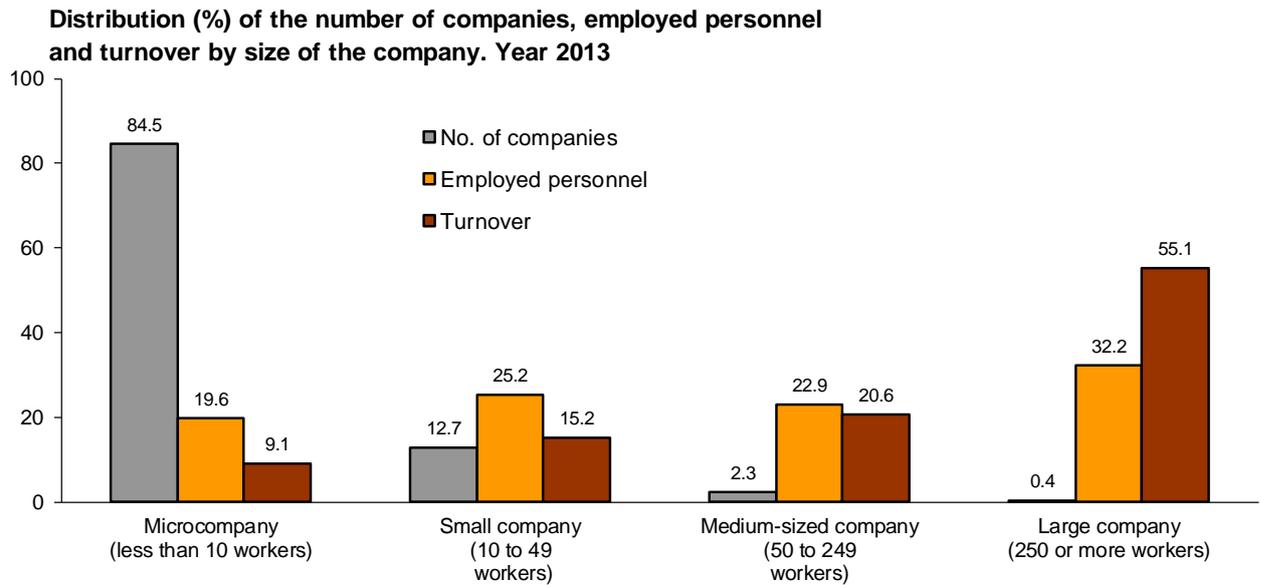
**Branches of activity with the greatest increase in their participation in sales outside Spain (%). Year 2013-2012**



### Results by company size

84.5% of industrial companies had less than 10 workers in 2013 and 12.7% had between 10 and 49. These companies occupied 44.8% 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 0.4% of the total industrial sector, invoiced 55.1% of the total sales in 2013.



In five 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, Fabricated metal products, except machinery and equipment* and *Repair and installation of machinery and equipment*.

**Distribution (%) of turnover by company size and industrial branch of activity. Year 2013**

Branch of activity	Microcompany (less than 10 workers)	Small company (10 to 49 workers)	Medium-sized company (50 to 249 workers)	Large company (250 or more workers)
<b>Mining and quarrying</b>	11.3	37.6	24.5	26.5
<b>Manufacturing industry</b>				
- Food products	8.0	22.1	31.0	38.9
- Beverages and tobacco	9.0	22.5	17.6	51.0
- Textiles, wearing apparel, leather and footwear	18.3	40.9	29.7	11.1
- Wood and cork, except furniture	24.6	38.5	36.9	(1)
- Paper and printing	12.5	21.2	30.5	35.9
- Petroleum industry	0.0	0.2	(1)	99.8
- Chemical industry	2.3	14.3	30.1	53.3
- Pharmaceutical industry	0.4	3.3	20.4	75.9
- Rubber and plastic products	4.8	24.0	34.7	36.6
- Various non-metallic ore products	9.5	23.2	33.0	34.4
- Metallurgy	1.7	10.0	25.4	62.9
- Fabricated metal products, except machinery and equipment	17.6	33.1	32.8	16.5
- Electrical, electronic and optical equipment	4.0	15.6	27.4	53.0
- Mechanical machinery and equipment	7.4	26.5	35.0	31.2
- Motor vehicles	0.6	2.3	11.4	85.8
- Other transport equipment	7.4	5.2	13.4	74.0
- Other manufacturing industries	25.7	35.3	24.2	14.8
- Repair and installation of machinery and equipment	22.5	28.2	24.6	24.7
<b>Electricity, gas, steam and air conditioning supply</b>				
- Electric power generation, transmission and distribution	23.8	6.0	7.8	62.4
- Gas, steam and air conditioning generation and distribution	11.5	10.8	7.3	70.4
<b>Water supply, sewerage, waste management and remediation activities</b>				
- Water collection, treatment and supply	12.6	15.1	19.8	52.5
- Sewerage, waste management and remediation activities	8.4	17.2	19.6	54.8
<b>TOTAL</b>	<b>9.1</b>	<b>15.2</b>	<b>20.6</b>	<b>55.1</b>

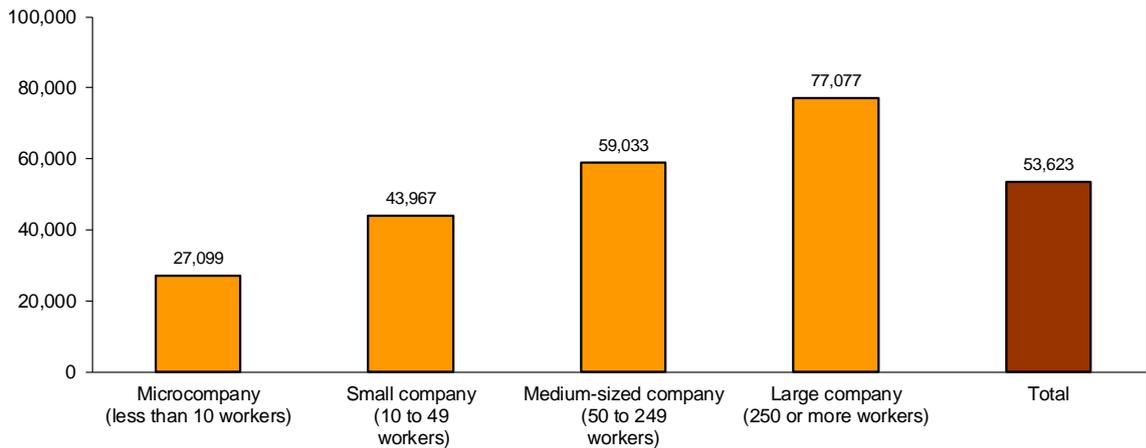
<sup>(1)</sup> For confidentiality reasons, they are in the previous group

### Size of the company and productivity within the manufacturing industry

For large companies (with 250 or more workers), the average productivity was 77,077 euros in 2013. These large companies were more common in *Petroleum industry, Pharmaceutical Industry* and *Motor vehicles*.

In contrast, companies with less than 10 workers registered the lowest productivity, with 27,099 euros.

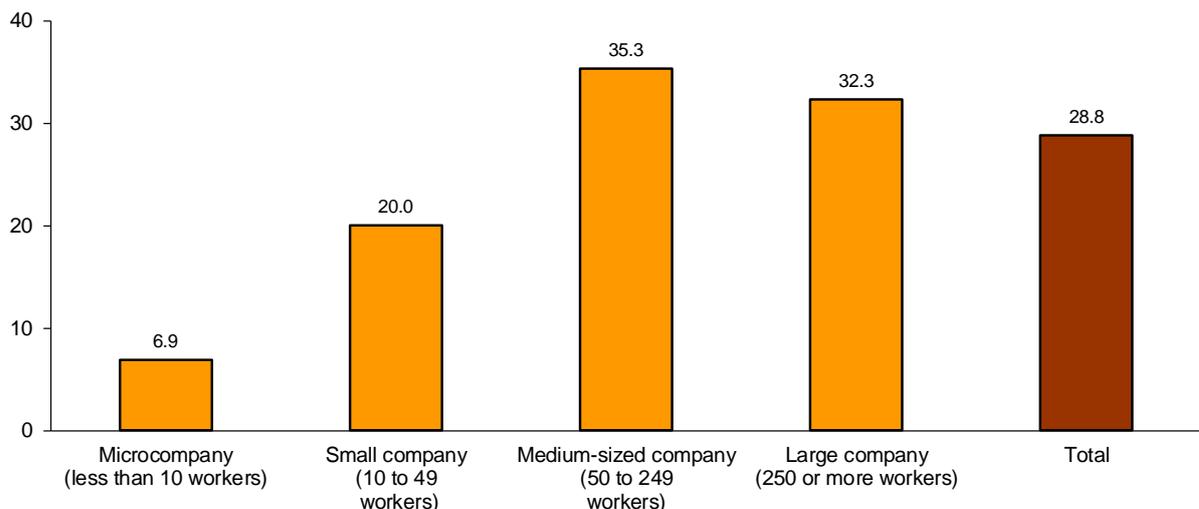
**Productivity (in euros) in the manufacturing industry by size of the company. Year 2013**



### Size of the company and sales outside Spain

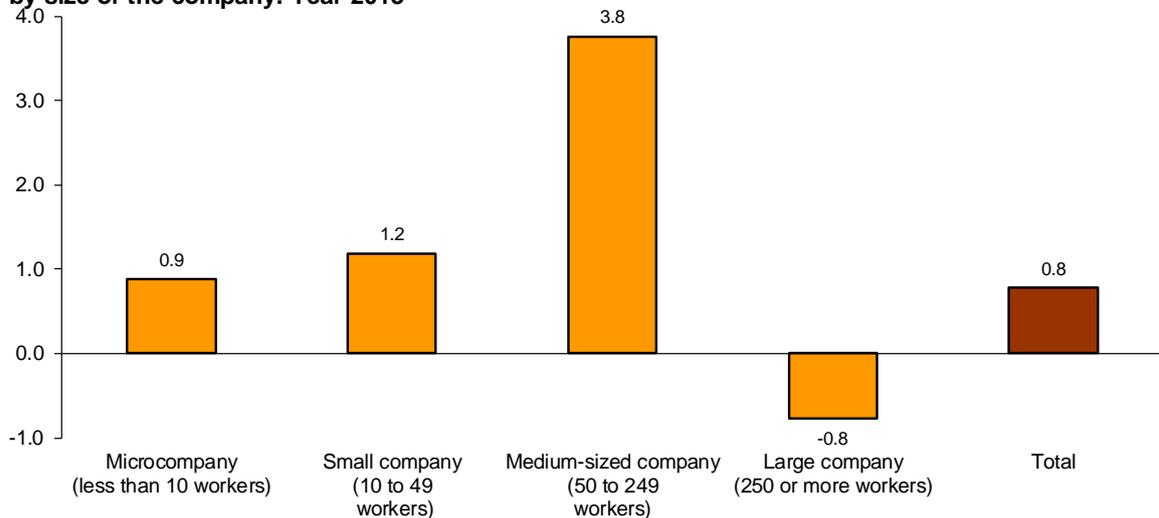
Industrial companies with 50 or more workers were those that were most likely to export, since the destination of more than 30% of their invoicing is abroad.

**Industrial turnover in the foreign market by size of the companies. Percentage as compared with the total turnover of each section of workers. Year 2013**



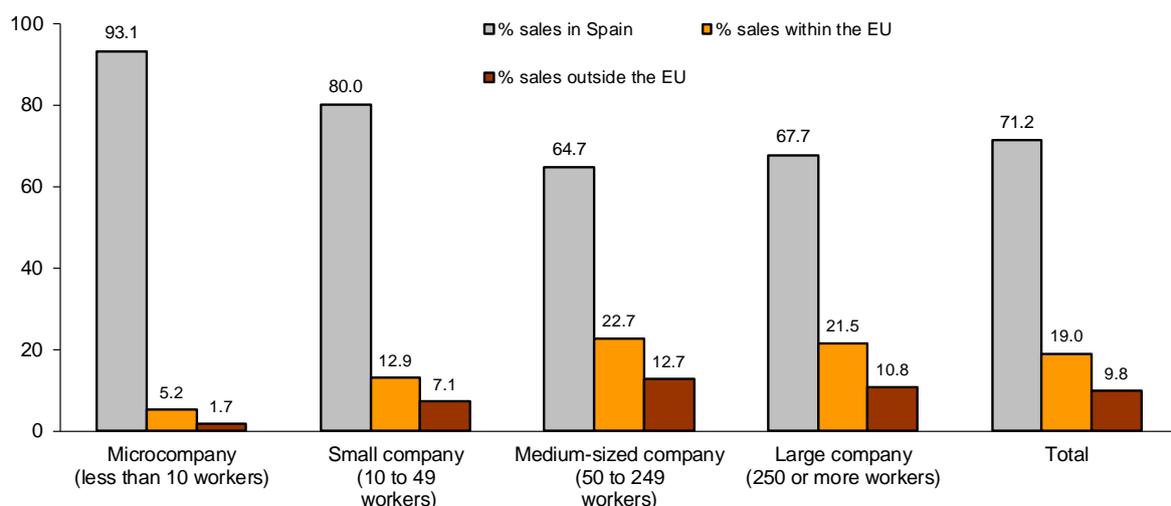
Medium sized companies (between 50 and 249 workers) were those that registered a greater dynamism abroad, with an increase of 3.8 points in their invoicing as compared to the previous year.

**Variation in the participation in sales (%) outside Spain, by size of the company. Year 2013**



Regarding the geographical destination of sales, companies with more than 50 workers invoiced more than 20% of sales in countries within the EU and more than 10% in countries outside the European Union.

**Annual variation (%) of sales in the industrial sector by geographical destination, by size of the company. Year 2013**



## Investment

Total investment (in tangible and intangible assets) made by industrial companies in 2013 reached 20,270 million euros. More than 70% was from *Manufacturing industry* and 19.4% from *Water supply, sewerage, waste management and remediation activities*.

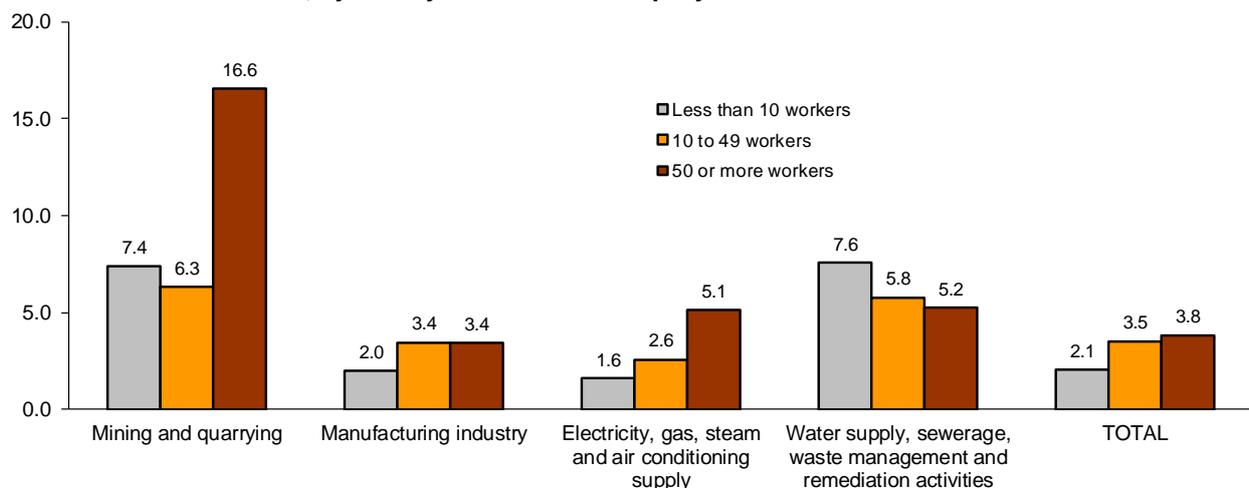
Investment accounted for 3.6% of the total turnover. The percentages varied by activity section, from 3.3% in *Manufacturing industry* to 11.7% in *Mining and quarrying*.

### Investment by activity groups. Year 2013

Activity section	Million euros	% over the total	% over turnover
Mining and quarrying	421	2.1	11.7
Manufacturing industry	14,927	73.6	3.3
Electricity, gas, steam and air conditioning supply	3,940	19.4	4.2
Water supply, sewerage, waste management and remediation activities	982	4.8	5.6
<b>TOTAL</b>	<b>20,270</b>	<b>100.0</b>	<b>3.6</b>

Investment generally grows as the companies' size increases. However, in *Water supply, sewerage, waste management and remediation activities*, companies with less than 10 workers registered higher investment rates regarding their turnover than companies with 50 or more workers.

### Investment over turnover, by activity sections and company size. Year 2013



## Results by Autonomous Cities and Communities

The Autonomous Communities with the greatest contribution to industrial turnover in the year 2013 were Cataluña (22.4%), Andalucía (12.5%) and Comunidad de Madrid (9.8%).

In turn, those with the least weight in turnover were Illes Balears (0.6%), La Rioja (1.0%) and Extremadura (1.2%).

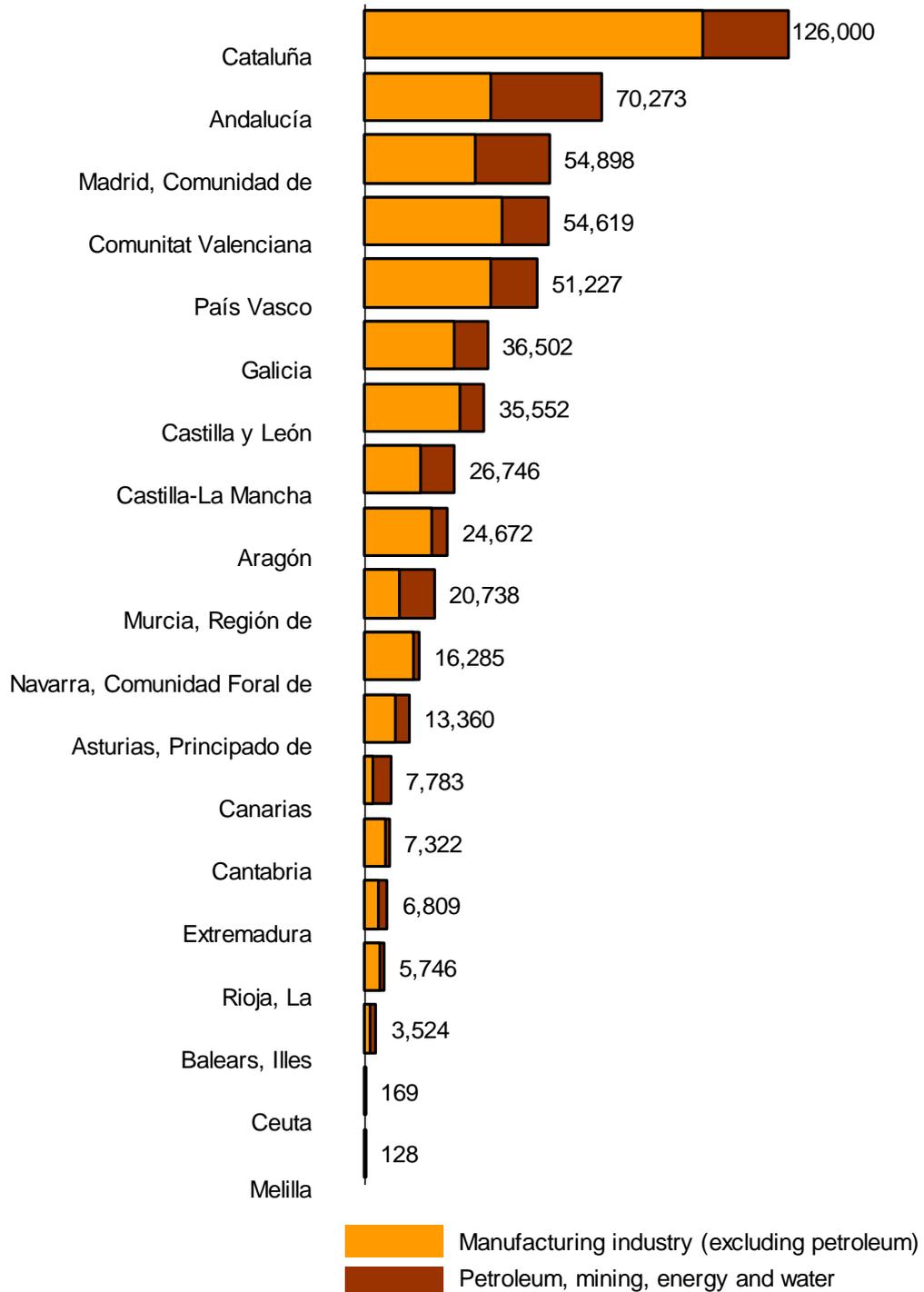
Regarding employment, all Autonomous Communities reduced their employed personnel as compared to 2012. The lowest decrease was registered in Comunidad Foral de Navarra (-1.0%), and the greatest one in Castilla y León (-6.9%).

## Turnover and employed personnel in the industrial sector by Autonomous City and Community. Year 2013

Autonomous Community	Turnover			Employed personnel		
	Million euros	% over the total	Annual variation (%)	Annual average	% over the total	Annual variation (%)
Andalucía	70,273	12.5	-3.5	197,658	10.1	-3.6
Aragón	24,672	4.4	0.7	86,715	4.4	-3.4
Asturias, Principado de	13,360	2.4	-4.6	48,495	2.5	-6.8
Balears, Illes	3,524	0.6	-7.7	21,427	1.1	-3.4
Canarias	7,783	1.4	-13.6	32,444	1.7	-3.6
Cantabria	7,322	1.3	-7.4	29,889	1.5	-3.8
Castilla y León	35,552	6.3	-4.3	120,853	6.2	-6.9
Castilla-La Mancha	26,746	4.8	-8.1	89,267	4.6	-5.0
Cataluña	126,000	22.4	-1.5	427,591	21.9	-3.1
Comunitat Valenciana	54,619	9.7	0.8	222,740	11.4	-2.9
Extremadura	6,809	1.2	0.7	27,340	1.4	-4.0
Galicia	36,502	6.5	6.7	133,120	6.8	-2.5
Madrid, Comunidad de	54,898	9.8	-9.5	181,655	9.3	-5.4
Murcia, Región de	20,738	3.7	2.6	63,889	3.3	-2.0
Navarra, Comunidad Foral de	16,285	2.9	1.0	60,790	3.1	-1.0
País Vasco	51,227	9.1	-2.0	178,817	9.2	-5.5
Rioja, La	5,746	1.0	-1.1	24,855	1.3	-6.4
Ceuta	169	0.0	(*)	1,086	0.1	(*)
Melilla	128	0.0	(*)	563	0.0	(*)
<b>TOTAL</b>	<b>562,351</b>	<b>100.0</b>	<b>-2.5</b>	<b>1,949,194</b>	<b>100.0</b>	<b>-3.9</b>

(\*) Data for 2012 not available

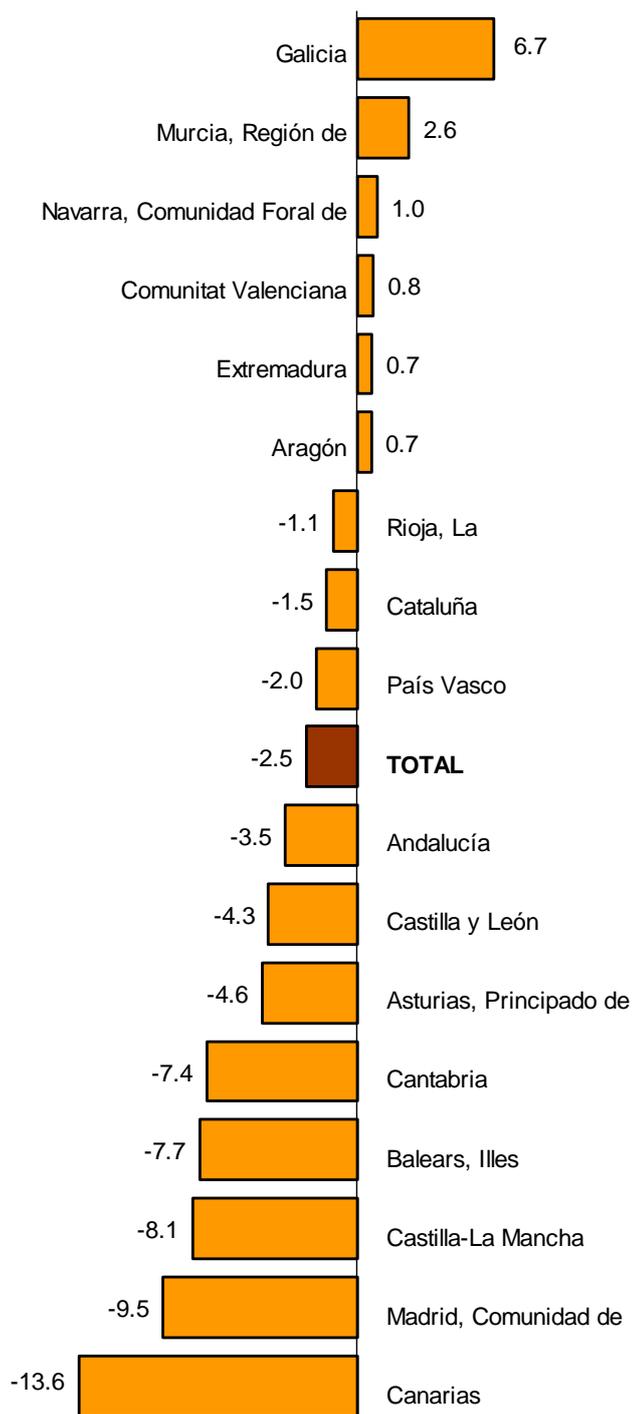
**Turnover (million euros) in the industrial sector  
by Autonomous Cities and Communities. Year 2013**



Regarding the evolution of turnover, two Autonomous Communities registered an increase higher than 2%: Galicia (6.7%) and Región de Murcia (2.6%).

In turn, the Autonomous Communities that registered the greatest decreases in their invoicing were Canarias (-13.6%), Comunidad de Madrid (-9.5%) and Castilla-La Mancha (-8.1%).

**Annual variation (%) of turnover in the industrial sector by Autonomous Cities and Communities. Year 2013**



## 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.

Until the reference year 2012, the Industrial Companies Survey focused on industrial companies with at least one wage-earning worker within Spain, excluding Ceuta and Melilla. From the reference year 2013 on, the survey widened its population and territorial scope, extending the coverage to industrial companies without wage earners and incorporating companies from Ceuta and Melilla.

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 42,000 units selected among a population of around 200,000, 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](http://www.ine.es/en/metodologia/t05/t0530p048_en.htm)