

15 December 2015

**Industrial Companies Survey**  
Year 2014

**Industrial turnover increases 1.7% in the year 2014 and stands at 571,922 million euros**

***Repair and installation of machinery and equipment* registers the highest increase in turnover (15.5%), while *Petroleum industry* presents the highest decrease (-8.1%)**

**29.7% of sales of the industrial sectors were made to countries outside of the European Union, that is, 1.0 points more than in the previous year**

The turnover for companies in the industry sector reached 571,922 million euros in 2014, with an increase of 1.7%, as compared to the previous year<sup>1</sup>.

Investment in tangible assets for industrial companies increased in 2014 by 1.3% up to 18,073 million euros.

The added value generated in 2014 by industrial companies stood at 127,547 million euros, 2.5% more as compared to the previous year.

**Main variables<sup>1</sup>. Year 2014**

<b>Variables</b>	<b>Value</b>	<b>Annual variation (%)</b>
Turnover	571,922	1.7
Purchases and work carried out by other companies	382,759	2.7
External services	72,676	0.1
Personnel expenditure	69,659	-0.6
Investment in tangible assets	18,073	1.3
Gross added value at factor cost	127,547	2.5

<sup>1</sup> All the economic variables are calculated at current prices

## Results by activity section

79.7% of the total invoicing of the sector in 2014 corresponded to *Manufacturing industry* and 16.6% to companies of *Electricity, gas, steam and air conditioning supply*.

Regarding employment, *Manufacturing industry* employed more than 1.723 million persons, which accounted for 89.2% of the total employed personnel of the sector. The companies of *Water supply, sewerage, waste management and remediation activities* employed 7.7% of the personnel of the sector.

## Turnover and employed personnel by activity section. Year 2014

Activity section	Turnover		Employed personnel	
	Million euros	% over the total	Annual average	% Over the total
Mining and quarrying	3,488	0.6	20,455	1.1
Manufacturing industry	455,870	79.7	1,723,688	89.2
Electricity, gas, steam and air conditioning supply	95,139	16.6	38,907	2.0
Water supply, sewerage, waste management and remediation activities	17,425	3.0	148,922	7.7
<b>TOTAL</b>	<b>571,922</b>	<b>100.0</b>	<b>1,931,972</b>	<b>100.0</b>

## Results by branch of activity

The branches of activity with the greatest contribution to the total turnover in 2014 were *Food products* (15.6%), *Electric power generation, transmission and distribution* (12.2%), and *Motor vehicles* (10.1%). In terms of added value, these three branches of activity have the greatest contribution, reaching 33.3% of the total.

The branches that registered the greatest increases were *Repair and installation of machinery* (15.5%) *Motor vehicles* (10.2%) and *Collection, filtering and distribution of water* (7.7%).

In turn, the branches that registered the greatest decreases were *Petroleum industry* (−8.1%), *Water supply, sewerage, waste management and remediation activities* (−5.8%) and *Paper and graphic arts* (−3.5%).

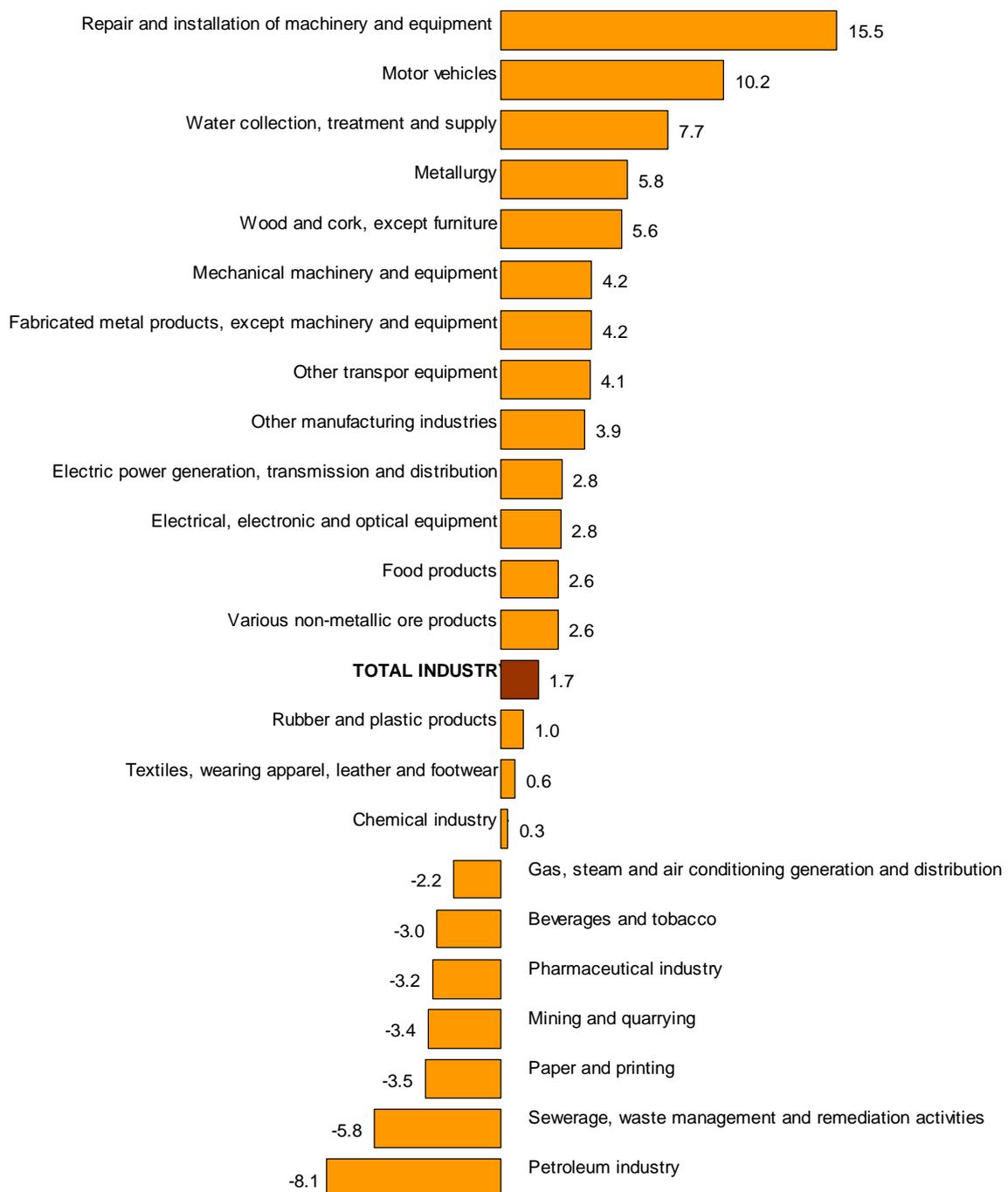
In terms of added value, the branches of activity that registered the highest increases were *Motor vehicles* (18.3%), *Pharmaceutical industry* (17.9%) and *Metallurgy* (13.9%).

### Turnover and employed personnel by activity branch. Year 2014

Branch of activity	Turnover			Gross added value (at factor cost)		
	Million euros	% over the total	Annual variation (%)	Million euros	% over the total	Annual variation (%)
<b>Mining and quarrying</b>	<b>3,488</b>	<b>0.6</b>	<b>-3.4</b>	<b>1,381</b>	<b>1.1</b>	<b>-9.1</b>
<b>Manufacturing industry</b>	<b>455,870</b>	<b>79.7</b>	<b>1.9</b>	<b>97,536</b>	<b>76.5</b>	<b>4.8</b>
- Food products	89,451	15.6	2.6	15,705	12.3	4.2
- Beverages and tobacco	16,593	2.9	-3.0	4,473	3.5	5.8
- Textiles, wearing apparel, leather and footwear	14,068	2.5	0.6	3,724	2.9	-1.0
- Wood and cork, except furniture	5,402	0.9	5.6	1,454	1.1	-0.9
- Paper and printing	17,699	3.1	-3.5	5,029	3.9	-5.7
- Petroleum industry	48,356	8.5	-8.1	1,022	0.8	-37.2
- Chemical industry	38,174	6.7	0.3	6,995	5.5	5.9
- Pharmaceutical industry	13,728	2.4	-3.2	4,925	3.9	17.9
- Rubber and plastic products	18,418	3.2	1.0	5,363	4.2	1.8
- Various non-metallic ore products	14,947	2.6	2.6	4,580	3.6	5.0
- Metallurgy	29,637	5.2	5.8	4,296	3.4	13.9
- Fabricated metal products, except machinery and equipment	28,808	5.0	4.2	9,683	7.6	3.6
- Electrical, electronic and optical equipment	17,640	3.1	2.8	4,630	3.6	1.7
- Mechanical machinery and equipment	18,209	3.2	4.2	6,176	4.8	8.2
- Motor vehicles	57,493	10.1	10.2	9,918	7.8	18.3
- Other transport equipment	11,367	2.0	4.1	3,137	2.5	-6.2
- Other manufacturing industries	8,547	1.5	3.9	3,002	2.4	2.2
- Repair and installation of machinery and equipment	7,334	1.3	15.5	3,425	2.7	10.4
<b>Electricity, gas, steam and air conditioning supply</b>	<b>95,139</b>	<b>16.6</b>	<b>1.4</b>	<b>19,669</b>	<b>15.4</b>	<b>-4.1</b>
- Electric power generation, transmission and distribution	69,912	12.2	2.8	16,802	13.2	-3.4
- Gas, steam and air conditioning generation and distribution	25,227	4.4	-2.2	2,866	2.2	-8.0
<b>Water supply, sewerage, waste management and remediation activities</b>	<b>17,425</b>	<b>3.0</b>	<b>-1.4</b>	<b>8,961</b>	<b>7.0</b>	<b>-4.7</b>
- Water collection, treatment and supply	6,303	1.1	7.7	2,960	2.3	1.4
- Sewerage, waste management and remediation activities	11,122	1.9	-5.8	6,000	4.7	-7.4
<b>TOTAL</b>	<b>571,922</b>	<b>100.0</b>	<b>1.7</b>	<b>127,547</b>	<b>100.0</b>	<b>2.5</b>

In turn, *Petroleum industry* (-37.2%), *Gas, steam and air conditioning supply* (-8.0%) and *Sewerage, waste management and remediation activities* (-7.4%) were the branches of activity with the greatest decreases in added value.

**Annual variation (%) in industrial invoicing by branch of activity. Year 2014**



## Employed personnel and productivity

The productivity (value added per person employed) in the manufacturing industry was 66,019 euros in 2014, that is, 3.4% more than in the previous year. Employed personnel in the sector increased up to 1.932 million persons, that is, 0.9% less than that of the previous year.

*Electric power generation, transmission and distribution*, due to its special features (high productivity with low workforce), registered the highest levels of productivity.

The *Manufacturing industry* concentrates 89.2% of the total of employed personnel in industrial companies, reached a productivity rate of 56,556 euros by employed person, which showed an increase of 5.5% as compared to the previous year.

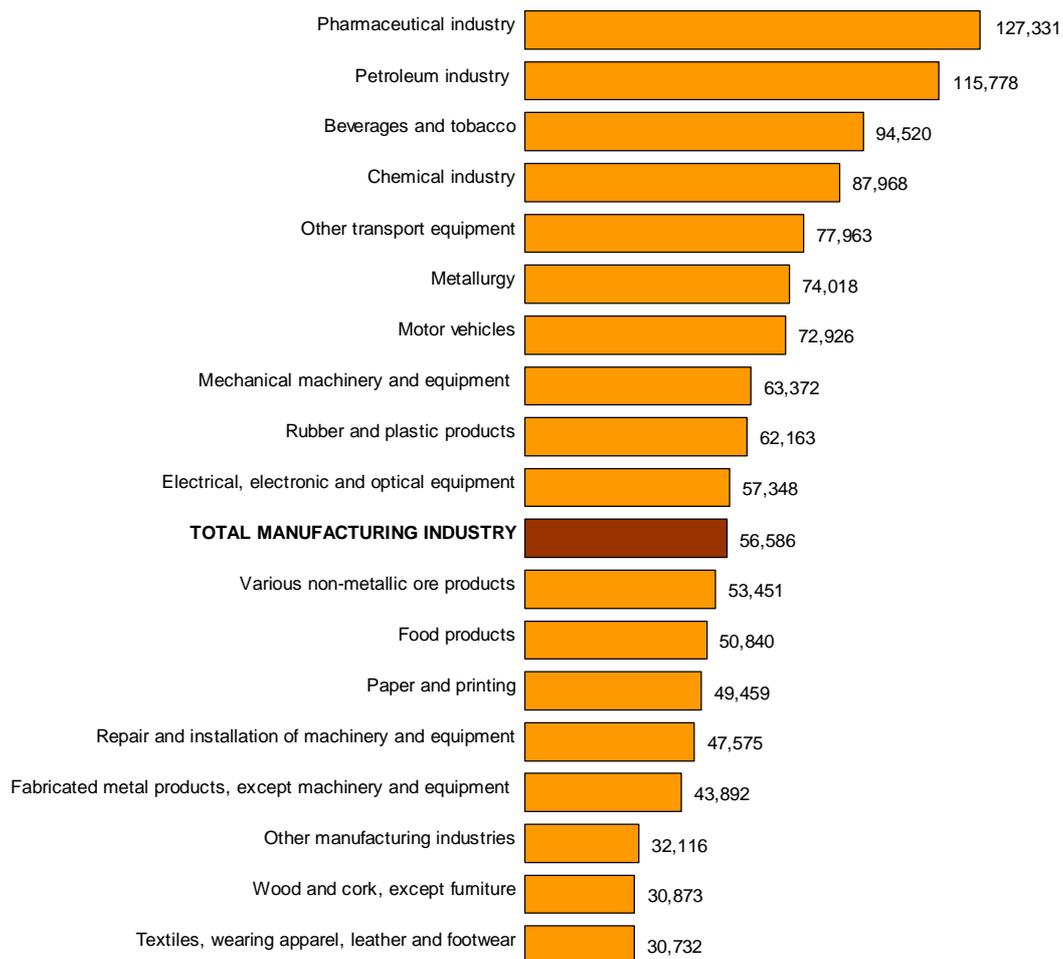
### Employed personnel in industrial companies and productivity by branch of activity. Year 2014

Branch of activity	Personal ocupado			Productivity	
	Annual average	% over the total	Annual variation (%)	Euros	Annual variation (%)
<b>Mining and quarrying</b>	<b>20,456</b>	<b>1.1</b>	<b>-4.8</b>	<b>67,514</b>	<b>-4.5</b>
<b>Manufacturing industry</b>	<b>1,723,690</b>	<b>89.2</b>	<b>-0.7</b>	<b>56,586</b>	<b>5.5</b>
- Food products	308,906	16.0	-0.2	50,840	4.4
- Beverages and tobacco	47,325	2.4	-1.8	94,520	7.7
- Textiles, wearing apparel, leather and footwear	121,162	6.3	0.7	30,732	-1.6
- Wood and cork, except furniture	47,094	2.4	-1.9	30,873	1.1
- Paper and printing	101,674	5.3	-3.7	49,459	-2.1
- Petroleum industry	8,829	0.5	-2.2	115,778	-35.8
- Chemical industry	79,521	4.1	-1.9	87,968	7.9
- Pharmaceutical industry	38,677	2.0	4.6	127,331	12.8
- Rubber and plastic products	86,268	4.5	-2.4	62,163	4.3
- Various non-metallic ore products	85,695	4.4	-5.3	53,451	10.8
- Metallurgy	58,041	3.0	0.4	74,018	13.4
- Fabricated metal products, except machinery and equipment	220,619	11.4	-1.8	43,892	5.5
- Electrical, electronic and optical equipment	80,743	4.2	-3.0	57,348	4.8
- Mechanical machinery and equipment	97,457	5.0	0.5	63,372	7.6
- Motor vehicles	135,997	7.0	3.2	72,926	14.7
- Other transport equipment	40,235	2.1	-0.5	77,963	-5.8
- Other manufacturing industries	93,461	4.8	-4.3	32,116	6.9
- Repair and installation of machinery and equipment	71,986	3.7	10.9	47,575	-0.5
<b>Electricity, gas, steam and air conditioning supply</b>	<b>38,907</b>	<b>2.0</b>	<b>-1.7</b>	<b>505,529</b>	<b>-2.4</b>
- Electric power generation, transmission and distribution	32,479	1.7	0.8	517,332	-4.2
- Gas, steam and air conditioning generation and	6,428	0.3	-12.8	445,893	5.6
<b>Water supply, sewerage, waste management and remediation activities</b>	<b>148,922</b>	<b>7.7</b>	<b>-2.6</b>	<b>60,170</b>	<b>0.0</b>
- Water collection, treatment and supply	34,326	1.8	-2.7	86,244	4.2
- Sewerage, waste management and remediation activities	114,596	5.9	-2.6	52,360	-4.9
<b>TOTAL</b>	<b>1,931,972</b>	<b>100.0</b>	<b>-0.9</b>	<b>66,019</b>	<b>3.4</b>

In the *Manufacturing industry*, *Pharmaceutical Industry* registered the greatest productivity, with 127,331 euros per person employed, followed by *Petroleum industry* (115,778 euros) and *Beverages and tobacco* (94,520 euros).

In turn, the sectors that registered the lowest productivity were *Textiles, wearing apparel, leather clothes and footwear* (30,732 euros), *Wood and cork, except furniture* (30,873 euros) and *Other manufacturing industries*<sup>2</sup> (32,116 euros per person).

**Productivity (in euros) by branch of activity in Manufacturing industry. Year 2014**



<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

70.3% of the sales of the industrial sector companies in 2014 were within Spain, 19.9% 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 *Transport material, except motor vehicles* (71.6%), *Motor vehicles* (65.2%) and *Mechanical and machinery equipment* (53.4%).

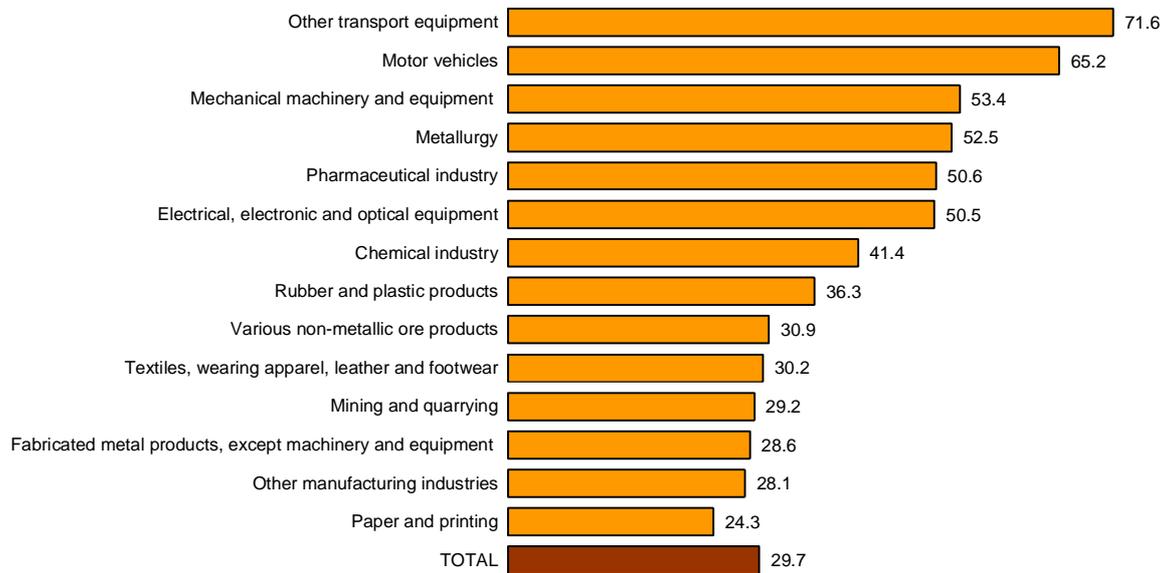
In turn, *Water supply, sewerage, waste management and remediation activities* and *Electricity, gas, steam and air conditioning supply* registered percentages lower than 10%.

## Sales outside Spain by branch of industrial activity. Year 2014

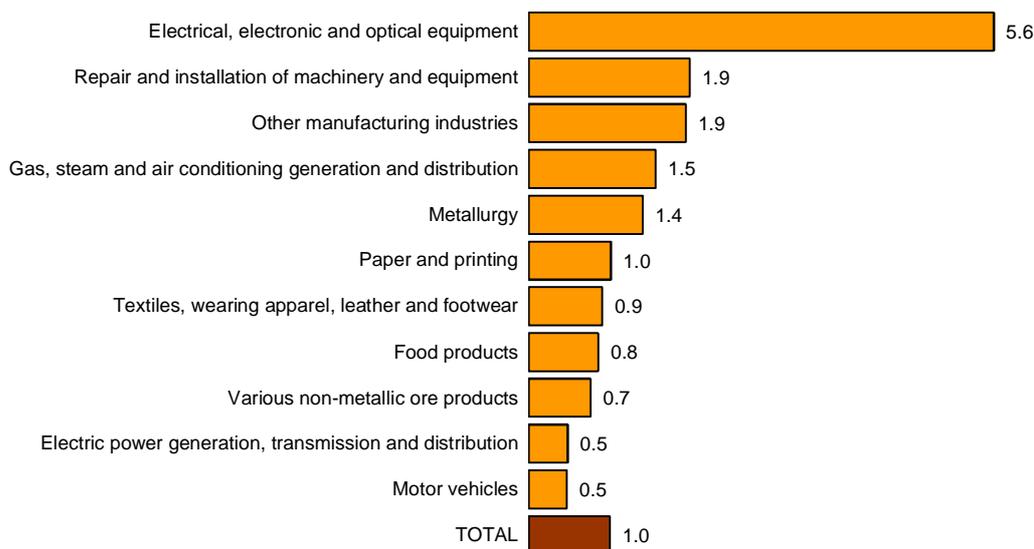
Branch of activity	Sales outside Spain		
	Million euros	% over the total sales	Difference between the % 2014-2013
Other transport equipment	8,138	71.6	-0.1
Motor vehicles	37,489	65.2	0.5
Mechanical machinery and equipment	9,729	53.4	0.1
Pharmaceutical industry	15,560	52.5	1.4
Metallurgy	6,952	50.6	-1.3
Electrical, electronic and optical equipment	8,902	50.5	5.6
Chemical industry	15,808	41.4	-1.0
Rubber and plastic products	6,679	36.3	0.0
Mining and quarrying	4,615	30.9	0.7
Various non-metallic ore products	4,245	30.2	0.9
Textiles, wearing apparel, leather and footwear	1,017	29.2	-2.4
Fabricated metal products, except machinery and equipment	8,246	28.6	0.4
Other manufacturing industries	2,397	28.1	1.9
Paper and printing	4,301	24.3	1.0
Wood and cork, except furniture	1,123	20.8	-0.2
Beverages and tobacco	17,018	19.0	0.8
Food products	3,152	19.0	-1.9
Repair and installation of machinery and equipment	1,379	18.8	1.9
Petroleum industry	7,241	15.0	0.1
Water collection, treatment and supply	1,654	6.6	1.5
Gas, steam and air conditioning generation and distribution	3,719	5.3	0.5
Electric power generation, transmission and distribution	319	5.1	-0.8
Sewerage, waste management and remediation activities	385	3.5	-0.3
<b>TOTAL</b>	<b>170,069</b>	<b>29.7</b>	<b>1.0</b>

In the graphs shown below, the activities with the highest percentage of sales in the foreign market during 2014 are shown, as well as the activities that have experienced a high increase in percentage of exports.

**Branch of activity with the highest percentage of sales outside Spain. Year 2014**



**Branch of activity with the highest difference in percentage of exports. Year 2014-2013**

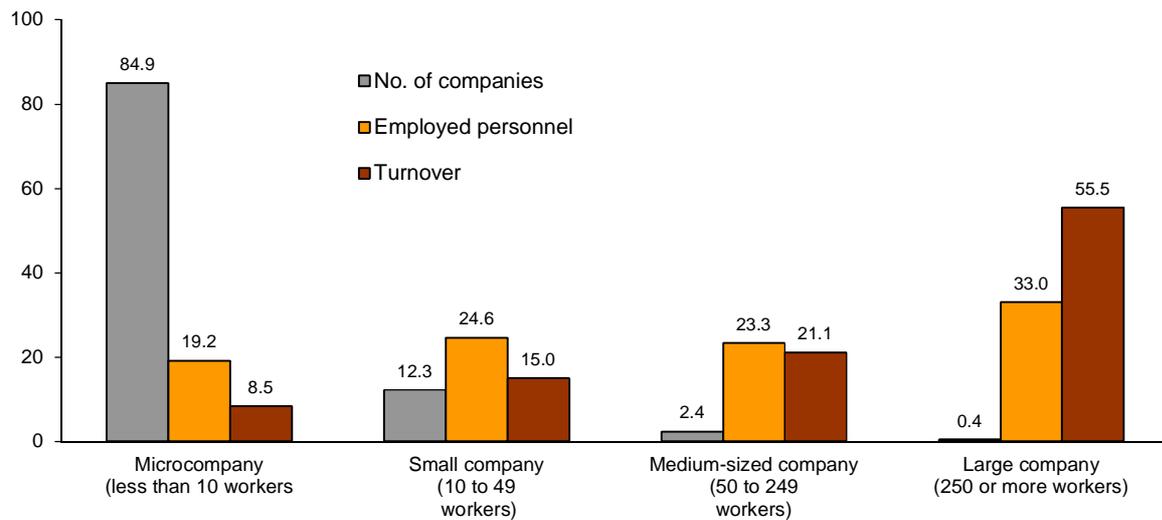


### Results by company size

84.9% of industrial companies had less than 10 workers in 2014 and 12.3% 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 0.4% of the total industrial sector, employed 33.0% of the personnel of the sector and invoiced 55.5% of the total sales in 2014.

### Distribution (%) of the number of companies, employed personnel and turnover size of the company. Year 2014



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, Textiles, wearing apparel, leather and footwear, Other manufacturing industries and Fabricated metal products, except machinery and equipment.*

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

**Year 2014**

<b>Branch of activity</b>	<b>Microcompany (less than 10 workers)</b>	<b>Small company (10 to 49 workers)</b>	<b>Medium- sized company (50 to 249)</b>	<b>Large company (250 or more)</b>
<b>Mining and quarrying</b>	13.5	35.0	22.9	28.6
<b>Manufacturing industry</b>				
- Food products	8.0	21.6	31.2	39.2
- Beverages and tobacco	10.0	20.6	19.2	50.2
- Textiles, wearing apparel, leather and footwear	16.9	42.6	30.9	9.6
- Wood and cork, except furniture	25.3	37.5	37.2	(1)
- Paper and printing	11.8	20.8	36.1	31.3
- Petroleum industry	0.0	0.2	(1)	99.8
- Chemical industry	2.2	13.7	31.9	52.1
- Pharmaceutical industry	0.4	3.3	24.3	72.1
- Rubber and plastic products	5.4	23.4	36.5	34.8
- Various non-metallic ore products	8.8	23.8	29.5	37.9
- Metallurgy	1.5	9.8	23.0	65.7
- Fabricated metal products, except machinery and equipment	17.5	32.9	32.3	17.3
- Electrical, electronic and optical equipment	4.0	14.6	26.8	54.6
- Mechanical machinery and equipment	6.8	27.7	33.6	32.0
- Motor vehicles	0.6	2.2	11.0	86.3
- Other transport equipment	12.1	4.5	14.2	69.2
- Other manufacturing industries	24.2	35.2	25.9	14.8
- Repair and installation of machinery and equipment	21.9	26.0	22.2	29.9
<b>Electricity, gas, steam and air conditioning supply</b>				
- Electric power generation, transmission and distribution	18.6	5.2	8.4	67.8
- Gas, steam and air conditioning generation and distribution	10.7	11.4	7.8	70.2
<b>Water supply, sewerage, waste management and remediation activities</b>				
- Water collection, treatment and supply	10.5	17.0	20.7	51.7
- Sewerage, waste management and remediation activities	8.0	20.1	18.9	53.1
<b>TOTAL</b>	<b>8.5</b>	<b>15.0</b>	<b>21.1</b>	<b>55.5</b>

(1) For confidentiality reasons, they are in the previous group

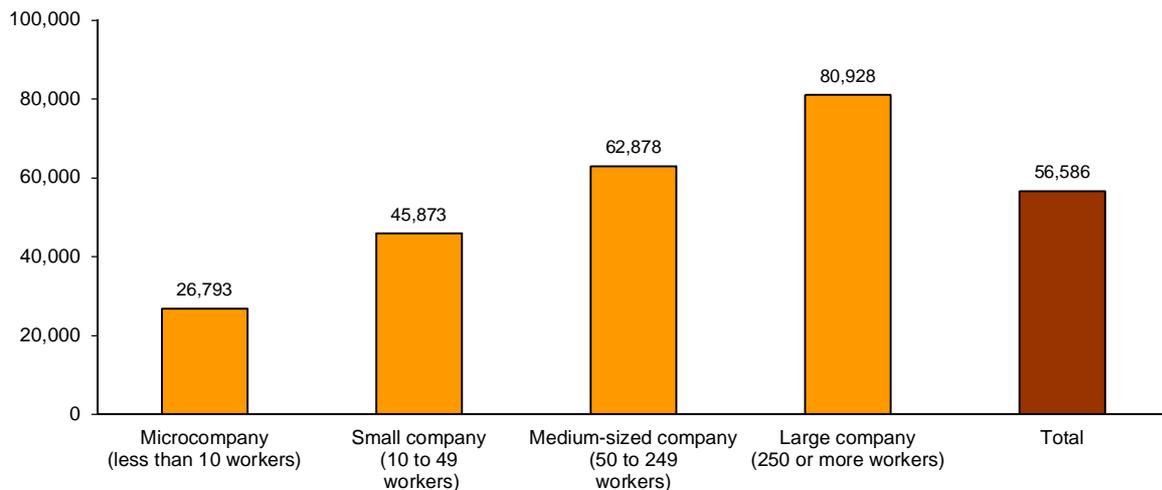
### Size of the company and productivity within the manufacturing industry

For large companies (with 250 or more workers), the average productivity was 80,928 euros in 2014. 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 26,793 euros.

### Productivity (in euros) in the Manufacturing industry by size of the company.

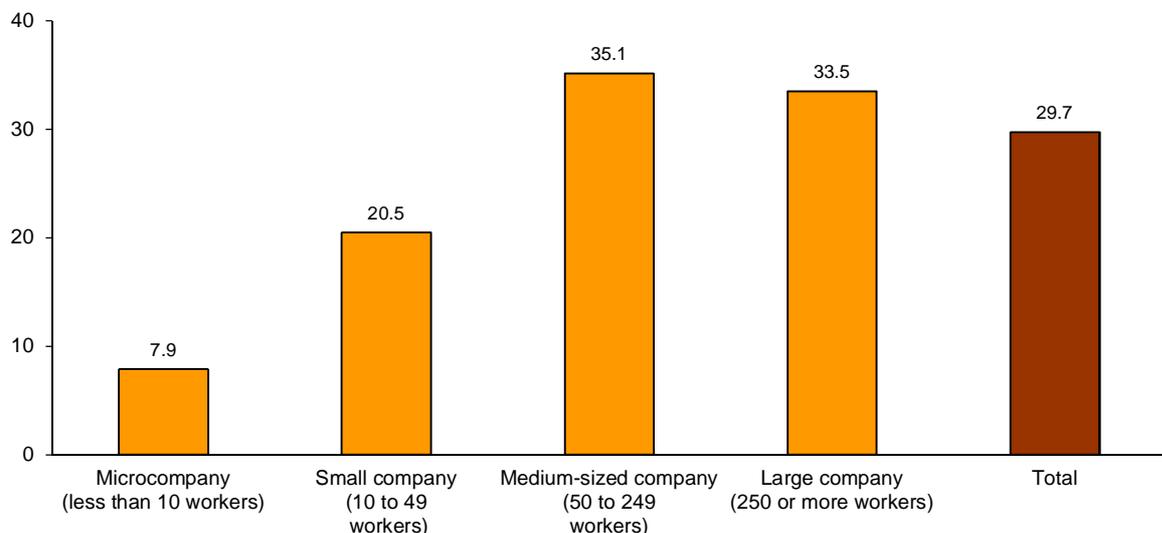
Year 2014



### Size of the company and exports

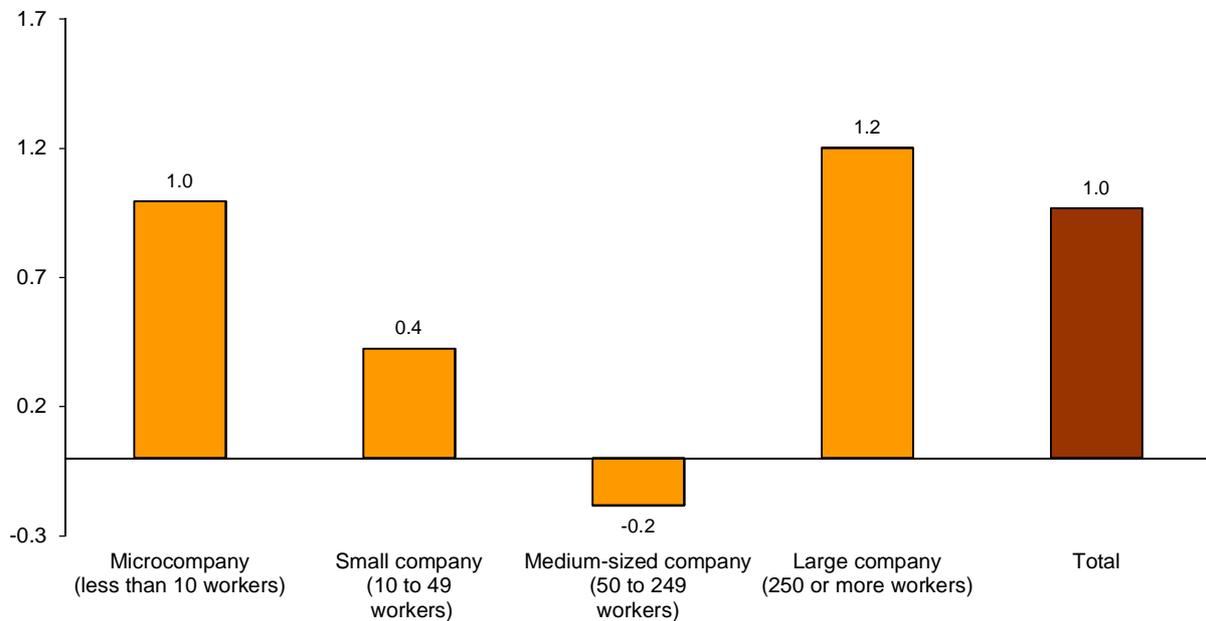
Industrial companies with 50 or more workers were those that were most likely to export, since the destination of more than 30% of their invoicing is abroad.

### Percentage of exports in industrial sector as compared with the total invoicing by size of the company. Year 2014



Large companies (with 250 or more workers), were those that registered a greater dynamism abroad, with an increase of 1.2 points in their export rate as compared to the previous year.

**Variation of percentage of exports by size of the company. Year 2014-2013**



**Investment**

Total investment (in tangible and intangible assets) made by industrial companies in 2014 reached 20,233 million euros. 75.7% was from *Manufacturing industry* and 17.1% from *Water supply, sewerage, waste management and remediation activities*.

Investment accounted for 3.5% of the total turnover. The percentages varied by activity section, from 3.4% in *Manufacturing industry* up to 15.6% in *Mining and quarrying*.

**Inversion by activity groups. Year 2014**

Activity section	Million euros	% over the total	% over turnover
Mining and quarrying	544	2.7	15.6
Manufacturing industry	15,317	75.7	3.4
Electricity, gas, steam and air conditioning supply	3,457	17.1	3.6
Water supply, sewerage, waste management and remediation activities	915	4.5	5.3
<b>TOTAL</b>	<b>20,233</b>	<b>100.0</b>	<b>3.5</b>

## Results by Autonomous Cities and Communities

The Autonomous Communities with the greatest contribution to industrial turnover in the year 2014 were Cataluña (22.3%), Andalucía (12.2%) and Comunidad de Madrid (10.1%).

In turn, those with the least weight in turnover were Illes Balears (0.7%), La Rioja (0.9%) and Extremadura and Canarias (both with 1.2%).

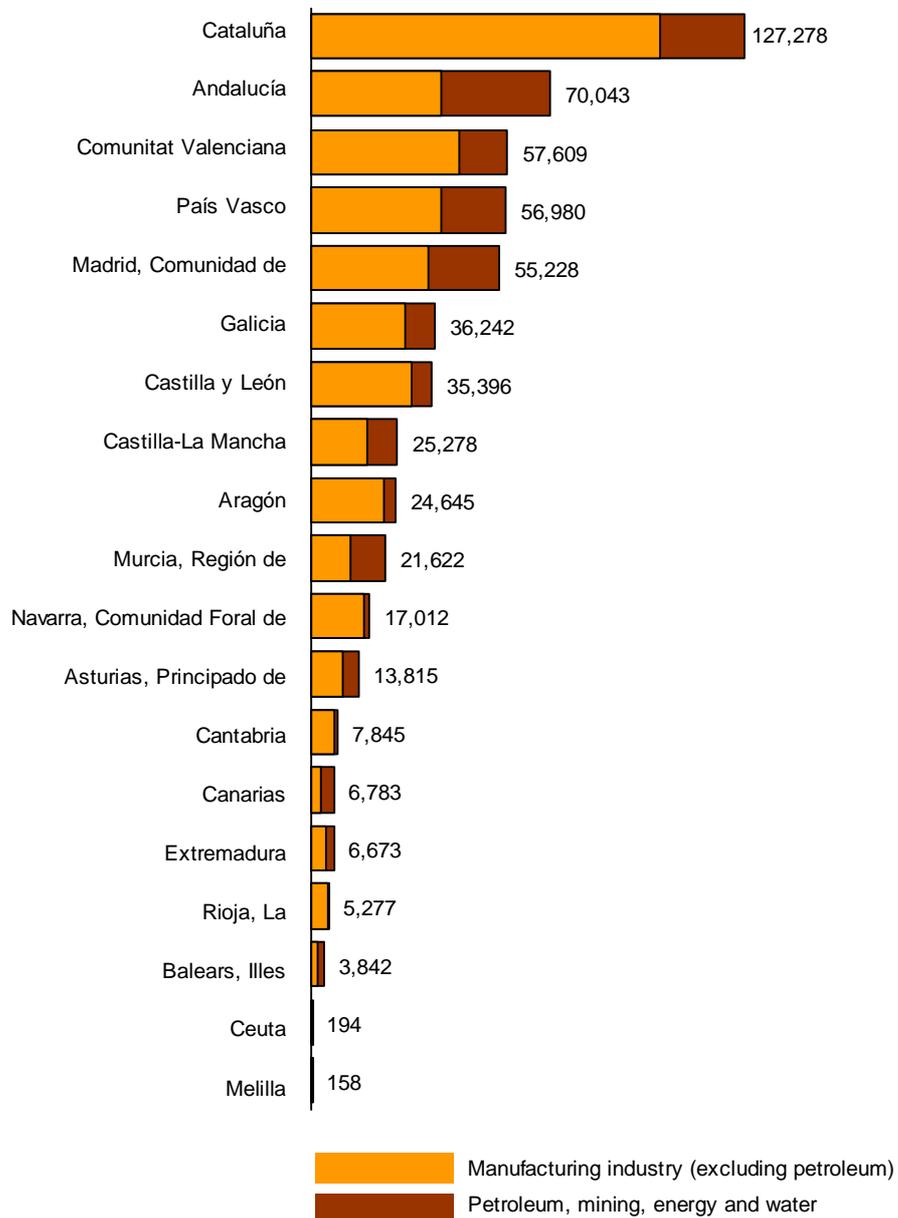
Regarding turnover evolution, the Autonomous Communities that registered the greatest increases were País Vasco (11.2%), Illes Balears (9.0%) and Cantabria (7.2%).

In turn, the greatest decreases were registered in Canarias (-12.8%), La Rioja (-8.2%) and Castilla-La Mancha (-5.5%).

### Turnover in industrial sector by Autonomous Cities and Communities. Year 2014

Autonomous Community	Million euros	% over the total	Annual variation (%)
Andalucía	70,043	12.2	-0.3
Aragón	24,645	4.3	-0.1
Asturias, Principado de	13,815	2.4	3.4
Balears, Illes	3,842	0.7	9.0
Canarias	6,783	1.2	-12.8
Cantabria	7,845	1.4	7.2
Castilla y León	35,396	6.2	-0.4
Castilla-La Mancha	25,278	4.4	-5.5
Cataluña	127,278	22.3	1.0
Comunitat Valenciana	57,609	10.1	5.5
Extremadura	6,673	1.2	-2.0
Galicia	36,242	6.3	-0.7
Madrid, Comunidad de	55,228	9.7	0.6
Murcia, Región de	21,622	3.8	4.3
Navarra, Comunidad Foral de	17,012	3.0	4.5
País Vasco	56,980	10.0	11.2
Rioja, La	5,277	0.9	-8.2
Ceuta	194	0.0	14.8
Melilla	158	0.0	23.1
<b>TOTAL</b>	<b>571,922</b>	<b>100.0</b>	<b>1.7</b>

Turnover (millions of euros) in the industrial sector by Autonomous Cities and Communities. Year 2014



## 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 42,500 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)