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# Northern Ireland Annual Business Inquiry (NIABI) 2007

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25 March 2009

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# Northern Ireland Annual Business Inquiry (NIABI) 2006 Revised, 2007 Provisional Results

Published 25/03/2009

The 2007 Northern Ireland Annual Business Inquiry (NIABI) provides output-based estimates for the year of the value of mainly business based economic activity across some two-thirds of the Northern Ireland economy. The survey covers most of the Production, Construction, Distribution and Service industries but excludes public sector activities for the most part. Revised information for 2006 is also made available in the report.

- **Total Approximate Gross Value Added (GVA) at basic prices for 2007 was £17,225 million representing an increase of £1,208 million (7.5%) compared to 2006. This is lower than the rate of growth recorded last year (9.7%) but higher than the annual average rate of growth over the period 2002-2006 (6.4%).**
- **The largest increase occurred in the Services sector where GVA increased over the year by £1,096 million (12.2%) to £10,099 million in 2007.**
- **The highest level of growth over the year within the Services sector was in Wholesale and Retail where GVA increased by £461 million (12.1%) to £4,283 million.**
- **Real Estate, Renting and Business Activities sector also gained £385 million (16.3%) in GVA over the period generating income worth £2,750 million.**
- **The Construction sector reported a decrease of £75 million (3.1%) over the year to £2,363 million after a year of strong performance in 2006. Manufacturing sector GVA (£3,967 million) increased by £110 million (2.9%).**
- **GVA per person in employment increased by 6.5% to £34,459 in 2007 compared to an annual average growth rate of 5.2% since 2002.**
- **Total turnover has increased from £50,564 million in 2006 to £53,366 million in 2007, which equates to 5.5% growth over the year. This was similar to the annual average rate of growth over the period 2002-2006 (5.0%).**
- **Employment costs increased by 5.2% over the year from £8,010 million in 2006 to £8,429 million in 2007.**
- **Net capital expenditure (e.g. on buildings or plant) was £2,823 million in 2007 down 0.9% from £2,849 million in 2006. This was much lower than the annual rate of change in the period 2002-2006 (15.0%).**





Department of Enterprise,  
Trade and Investment

# Northern Ireland Annual Business Inquiry (NIABI) 2006 Revised, 2007 Provisional Results

March 2009



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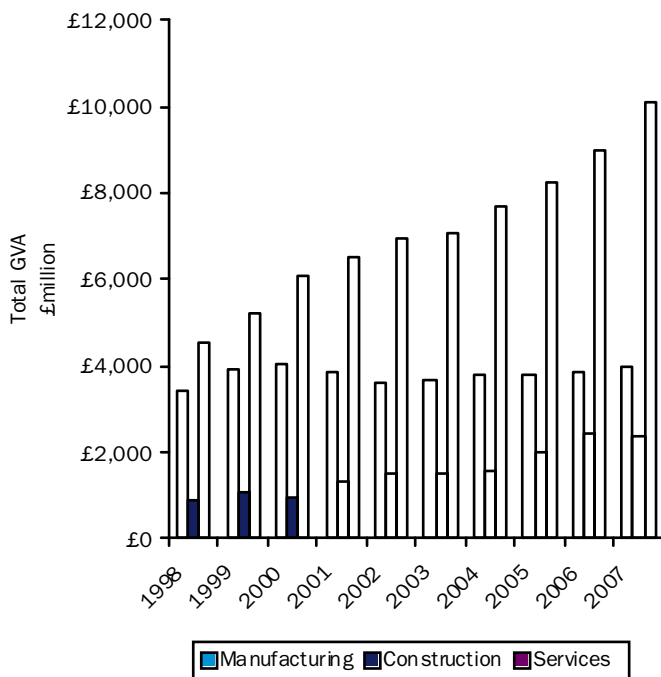
# Executive Summary

# 1

## EXECUTIVE SUMMARY

The 2007 Northern Ireland Annual Business Inquiry (NIABI) collects both employment and financial information from businesses and other establishments and covers about two thirds of the economy. This includes the Production, Construction, Distribution and Service industries<sup>2</sup> in Northern Ireland but excludes public sector activity for the most part. Coverage also includes agriculture (part), forestry and fishing, and private sector businesses within education and health and social work on a consistent basis from 1998, where information is available. The Office for National Statistics (ONS) has responsibility for the production of UK regional ABI estimates and 2007 results are scheduled for release on 30<sup>th</sup> July 2009.

**Figure 1 – Total GVA At Basic Prices 1998-2007 £ million**



## Turnover and Gross Value Added

Turnover<sup>3</sup> by businesses in Northern Ireland was estimated to be worth £53,366 million in 2007 (excluding VAT); an increase of 5.5% compared to 2006. After expenditure on goods and services was accounted for this represented a total figure of £17,225 million in terms of approximate Gross Value Added (GVA), a measure of the value of economic activity generated by businesses, an increase of 7.5% (£1,208 million) over the year. The annual increase in GVA between 2006 and 2007 was lower than the previous years growth rate (9.7%) for 2005 – 2006 but higher than annual average growth rate recorded over the period 2002-2006 (6.4%).

## Share of Turnover & GVA by Industry

The relative importance of the main industry sectors in terms of GVA and changes since 1998 can be seen in figure 1. The Service sector accounted for approximately 56.9% of businesses' turnover and 58.6% of GVA in 2007 reflecting its continuing importance to the Northern Ireland economy. Manufacturing also continued to play a key role with the sector being responsible for 28.2% of turnover and 23.0% of GVA - broadly similar to the situation in 2006.

The Service sector accounted for 58.6 of GVA (£10,099m) in 2007 compared to 55.3% (£6,923m) in 2002.

Manufacturing accounted for 23.0% of GVA (£3,967m) in 2007 compared to 28.9% (£3,612m) in 2002.

13.7% (£2,363m) of total GVA was accounted for by the Construction sector in 2007 compared to 11.9% (£1,486m) in 2002.

## Changes in GVA 2006 – 2007

The £1,208 million increase in GVA was due for the most part to a 12.2% (£1,096m) increase in Service sector GVA from £9,003 million to £10,099 million. Manufacturing GVA increased over the period by 2.9% (£110m) from £3,856 million to £3,967 million. Construction fell by 3.1% (£75m) from £2,438 million to £2,363 million over the same period.

### Annual Changes Within Sector

The largest increase in terms of value within the Service sector was in the Wholesale and Retail sector with an increase of £461 million (12.1%). Real Estate, Renting and Business Activity increased by £385 million (16.3%). This sector now accounts for 24.9% of total business GVA.

In Manufacturing the largest increase in GVA was in the All Other Manufacturing sector which covers subsections DC, DF and DN (see Table 2 for descriptions) up £116m (71.4%) to £279m.

The largest decrease in Manufacturing GVA was recorded in the Manufacture of Transport Equipment, down £133m (34.9%) to an estimated £248m.

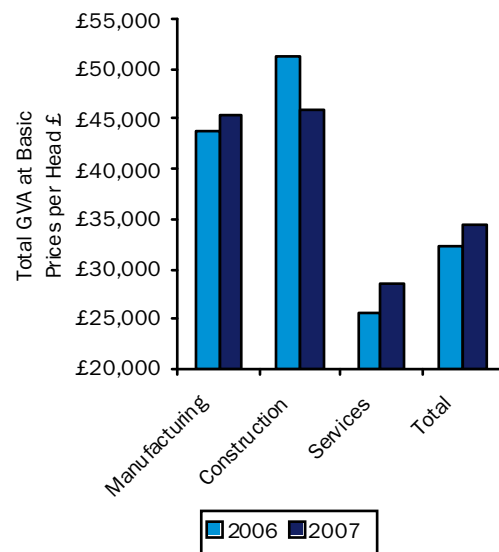
### Employment levels

The NIABI provides estimates of employment to enable per head calculations to be made. Preferred estimates of the changes in employment and employee jobs are provided by the Labour Force Survey and Quarterly Employment Survey respectively, and can be found on the DETI web site.

### GVA per head

The NIABI allows estimates of both the value added per person<sup>4</sup> in employment (GVA per head) and employment costs per head to be calculated across different industries. Total GVA per head at basic prices increased by 6.5% from £32,348 in 2006 to £34,459 in 2007 in Northern Ireland. Over the same period GVA per head, increased in the Service sector (£28,497) by 11.8% and in Manufacturing (£45,493) by 3.8%. GVA per head at basic prices decreased in Construction (£46,020) by 10.4

Figure 2 – GVA per Head by Section 2006-2007



### GVA per head within main Sectors

In the three largest sub sections by GVA value within Manufacturing, GVA per head increased by 2.4% in the Food Products, Beverages and Tobacco sector, rose by 12.7% in the Manufacture of Electrical and Optical Equipment and fell by 4.8% in the Manufacture of Machinery Equipment in the period 2006-2007.

In the three largest sectors within Services, GVA per head increased in the Wholesale and Retail sector by 10.8%, by 14.6% in Real Estate, Renting and Business Activities and by 5.8% in the Transport, Storage and Communication sector in the same period.

There is considerable variation in terms of GVA per head between sectors, reflecting different value added contributions per person in employment and differences in the extent of part-time employment of which the per head measure does not take account.

Service sector GVA per head was highest in the Transport, Storage and Communication sector (£42,769) in 2007.

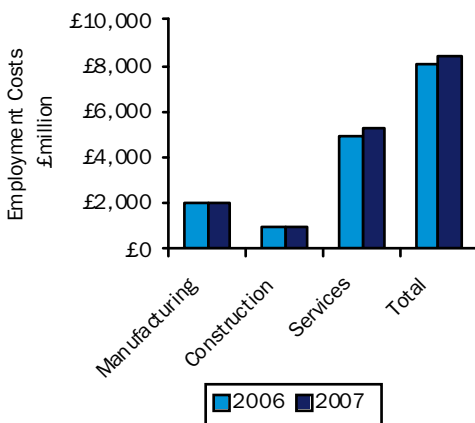
## Employment Costs

While GVA increased over the year by 7.5%, wages and salary costs and payments on behalf of employees have increased by 5.2% from £8,010 million in 2006 to £8,429 million in 2007 - figure 3. Sixty-three percent of such payments for employees were accounted for by the Service sector and were worth £5,289m in 2007, up 7.5% on 2006.

The value of Construction salaries were up 5.3% (£50 million) on 2006 and were worth £990 million in 2007.

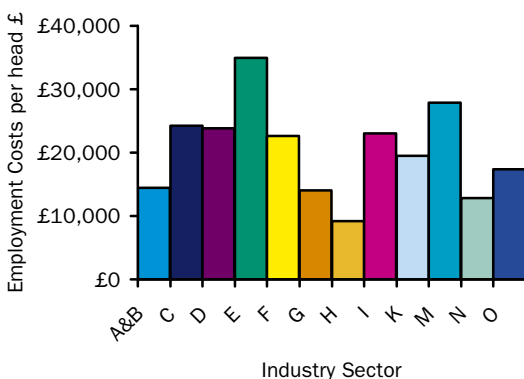
The value of Manufacturing salaries and employee payments increased by £14m (0.7%) over the year to be worth £2,010 million to the NI economy in 2007.

**Figure 3 – Total Employment Costs 2006-2007**



Employment costs per head vary considerably by section from £34,949 in the Electricity, Gas and Water supply industry and £24,227 in Mining and Quarrying to £9,182 in the Hotels and Restaurants sector – figure 4.

**Figure 4 - Employment Costs per Head by Section 2007**



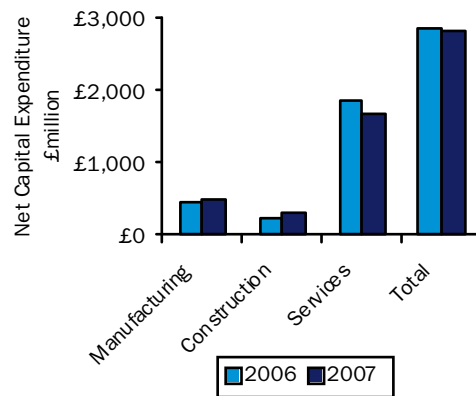
## Purchases

Total Purchases represent the value of all goods, materials and services purchased during the year. In 2007 total purchases were £34,610 million which represented an increase of 5.5% from 2006. Purchases per head have also increased in the period 2006 to 2007 by 4.5% from £66,245 to £69,238.

## Net Capital Expenditure

Capital Expenditure is calculated using the value of new building work and any new acquisitions less disposals of land or plant and machinery and can be interpreted as one indicator of the level of investment<sup>5</sup> in the Northern Ireland economy.

**Figure 5 – Net Capital Expenditure 2006-2007**



Overall net capital expenditure was £2,823 million in 2007 down 0.9% from £2,849 million in 2006. During 2007 net capital expenditure was greatest in the Manufacturing sector (£486 million) representing an increase of 7.9% since 2006. The next largest share of net capital expenditure was in Real Estate, Renting and Business Activity at £395 million, a fall of 56.3% over the year from £903 million in 2006.

## Further NIABI Results

More detailed sectoral analysis for 2007 will be placed on the DETI web site when available and revised results for 2007 will be published in December 2009.

## NOTES

Users should note that the NIABI methodology is currently under review. In survey year 2007 the sample was redesigned to provide a specified level of precision. In survey year 2008 work will be carried out to increase consistency of employee job measures in Northern Ireland.

<sup>1</sup>. Basic Prices reflect the amount received by a producer for a unit of goods and services minus any taxes payable on the product such as VAT

<sup>2</sup>. Full details regarding ABI sectoral coverage can be found on page 16.

<sup>3</sup>. Turnover is defined as the value of total sales and work done.

<sup>4</sup>. The ABI does not distinguish between full and part time jobs when calculating per head values. It should also be noted that the employment information is at a fixed point in time whereas the financial information is over an annual period. The data are not preferred measures of competitiveness and productivity, which are instead based on Regional Accounts measures of GVA.

<sup>5</sup>. This data should be interpreted with caution as large capital projects can have an undue influence on any one-year's figures.

**A&B** – Agriculture (Part), Hunting and Forestry, Fishing

**C** – Mining and Quarrying

**D** – Manufacturing

**E** – Electricity, Gas and Water Supply

**F** – Construction

**G** – Wholesale and Retail Trade

**H** – Hotels and Restaurants

**I** – Transport Storage and Communication

**K** – Real Estate, Renting and Business Activity

**M** - Education

**N** - Health and Social Work

**O** – Other Community, Social and Personal Service Activities

# Introduction

## 2

The Northern Ireland Annual Business Inquiry (NIABI) is a survey carried out by the Department of Enterprise Trade and Investment (DETI) since 1998 that provides a number of key measures of the economic performance of businesses and other establishments<sup>1</sup> based in Northern Ireland. This report provides provisional results for the 2007 survey and revised information for the year 2006. It includes financial information at basic prices<sup>2</sup> for the most recent accounting year (2007) and reports employment levels at a fixed point in time (September 2007) to cover most of the main areas of the economy including the Manufacturing, Construction, Distribution and Service sector industries. The main exclusions from the survey are in the areas of public sector administration, health and education for the most part. As such the NIABI provides one of the earliest measures available of the levels of economic performance of about two-thirds of the Northern Ireland economy. Comparable information for all regions of the UK is scheduled to be published by the Office for National Statistics on 30<sup>th</sup> July 2009 which will allow the Northern Ireland information to be placed in a wider context.

### Structure of the report

This report provides an analysis of a number of key indicators such as the total value of sales and work completed by businesses (Turnover), Approximate GVA, the value of the purchase of goods, materials and services, total employment costs and expenditure on such areas as capital investment by businesses and others.

The information is disaggregated by the major Standard Industrial Classifications (SIC03) and equivalent per head information is provided using the employment data collected. More detailed sectoral data at the 2 digit SIC level will be placed on the DETI web site. Further variables and more detailed industrial breakdowns are also available (e.g. 3, 4 & 5 digit industrial classification subject to confidentiality constraints) as is a bespoke analysis service on request. From 2001 the data coverage has been extended to include sector A (part) Agriculture, Hunting and Forestry and B Fishing, and also private sector businesses within M, Education and N, Health and Social Work. This brings the published sectors in line with those provided by ONS. A back series of this data has been provided at Table 1.

### Employment Estimates

The NIABI provides estimates of employment to enable per head calculations to be made. Preferred estimates of the changes in employment and employee jobs are provided by the Labour Force Survey and Quarterly Employment Survey respectively and can be found on the DETI web site.

The NIABI estimates are at a fixed point in time and as such do not take into account within year seasonal variations in employment and may therefore distort measures such as GVA (which is based on a full year) per head for those sectors where such effects occur. Users should note that the employment collection date for survey years up to 2005 was at a December point in time. From 2006 onwards this has shifted to a September date. This change may have introduced some seasonal effects in employment levels between the survey years 2005 and 2006.

<sup>1</sup> Other establishments include organisations such as local authorities whose primary activities are classified outside public administration and non-profit making organisations

<sup>2</sup> Basic prices reflect the amount received by a producer for a unit of goods and services minus any taxes payable on the product such as VAT (see also notes at back)

# Turnover

## 3

Total turnover consists of total takings or invoiced sales and receipts of the business in connection with the sale of goods, work done and services rendered. Adjustments have been made so that all turnover excludes VAT.

Total turnover has increased from £50,564 million in 2006 to £53,366 million in 2007, which equates to 5.5% and is broadly similar to the average annual rate of growth reported in the period 2002-2006 (5.0%). This comprises a 3.9% increase in Manufacturing turnover from £14,472 million to £15,031 million and a 8.0% increase in Services from £28,122 million to £30,375 million. Over the year turnover in the Construction section decreased by 0.5%.

**Figure 1 – Total Turnover 1998-2007 £ million**

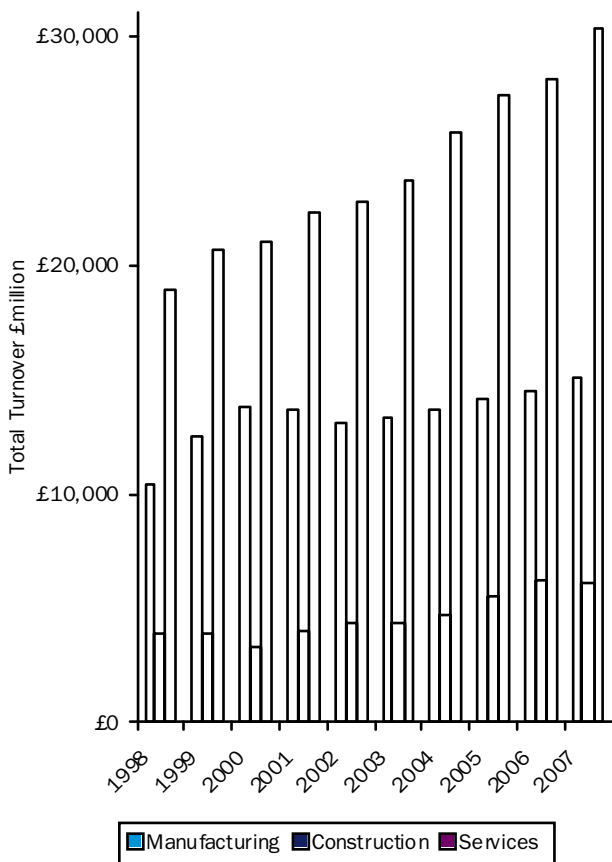
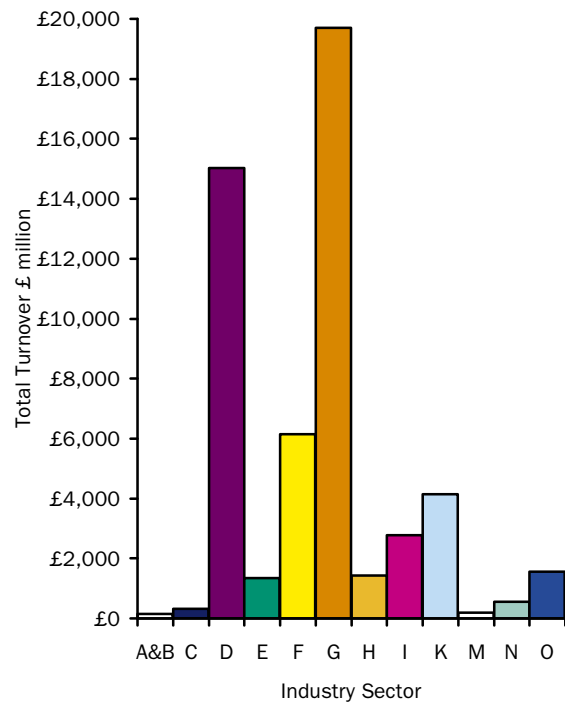


Figure 2 demonstrates the variation of turnover by industry sector in 2007, from the highest turnover in the Wholesale and Retail Trade worth £19,709 million (section G) followed by Manufacturing £15,031 million (section D), to just £154 million in Agriculture, forestry and fishing (sections A&B).

Overall the Service sector accounted for 56.9% of the total Northern Ireland turnover in 2007 which was slightly higher to that in 2006 (55.6%).

**Figure 2 – Total Turnover by Section 2007 £ million**

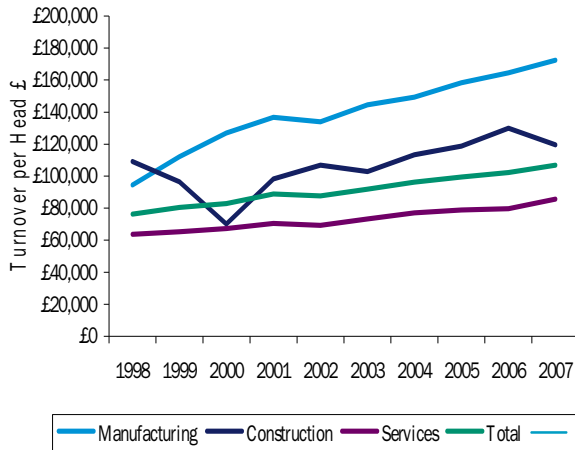


See page 7 for Industry classifications.

## Turnover per head

Total turnover per head (figure 3) is significantly lower within the Service sector (£85,709) than within Manufacturing (£172,396) for 2007.

**Figure 3 – Turnover per Head by Section 1998-2007**



Overall turnover per head has increased by 4.5% over the period 2006 to 2007, from £102,120 to £106,762– figure 3.

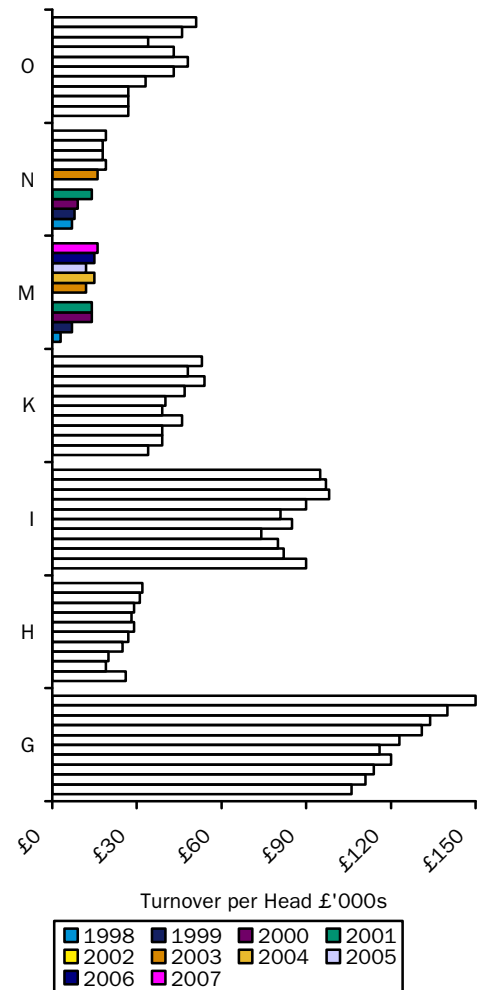
Within the Service sector, Wholesale and Retail Trades had the highest turnover per head in 2007 (£150,043), followed by Transport Storage and Communication (£95,195) – figure 4.

Lowest turnover per head was experienced within Education (£16,257), Health (£19,309) and Hotels and Restaurants (£32,459).

Within the Wholesale and Retail sector turnover per head rose from 2006 to 2007 by 7.6%.

The greatest change in turnover per head within the Service sector in terms of value was in Wholesale and Retail which rose by £10,541 from £139,502 in 2006 to £150,043 in 2007. The lowest was a fall of £1,531 in Transport Storage and Communication from £96,726 in 2006 to £95,195 in 2007.

**Figure 4 – Turnover per Head within Services 1998-2007**



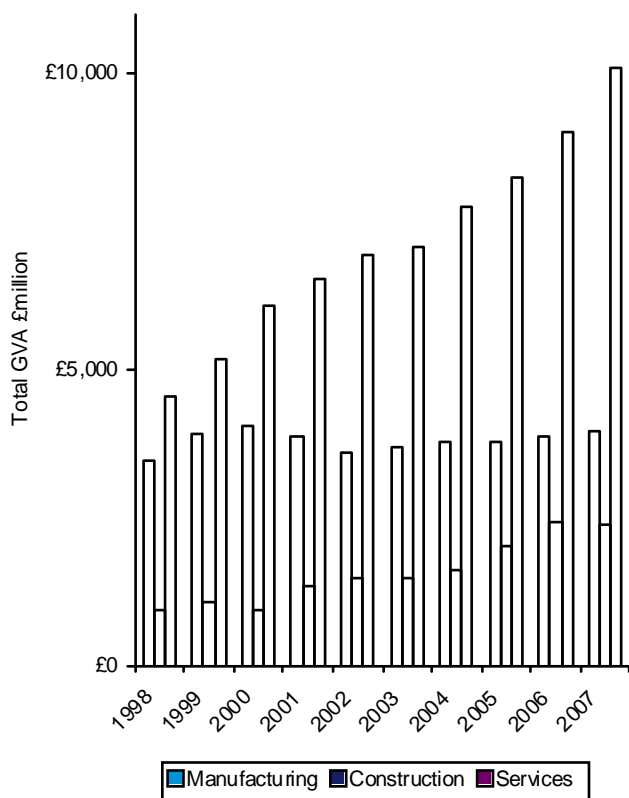
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**N** - Health and Social Work  
**O** – Other Community, Social and Personal Service Activities

# Gross Value Added at Basic Prices

## 4

Approximate Gross Value Added (GVA) represents the wealth created by businesses and is essentially the difference between income and expenditure on external goods and services, though it includes employment costs, such as wages and salaries and payments on behalf of employees such as national insurance. These are output-based measures of GVA. All published GVA is given at basic prices i.e. adjustments are made for changes in stock levels, own account capital expenditure, local authority rates and excise duties.

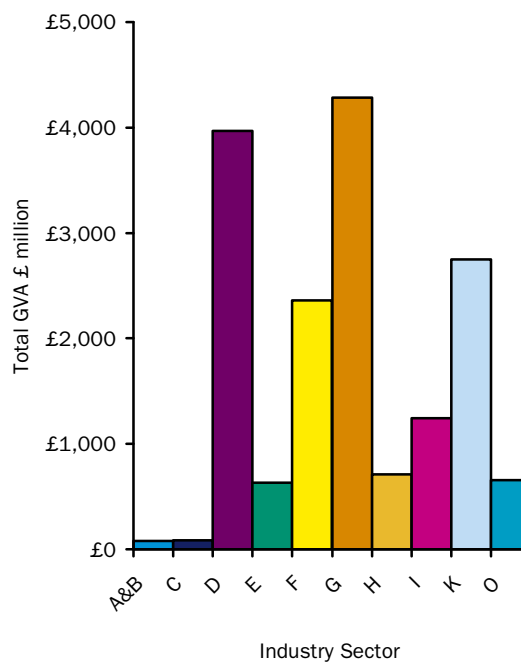
**Figure 5 – Total GVA At Basic Prices 1998-2007 £ million**



In 2007 total GVA at basic prices was £17,225 million, an increase of 7.5% on the figure for 2006 (£16,017 million) - figure 5. This comprises a 12.2% increase in Services (£9,003 million to £10,099 million) and a 2.9% increase in Manufacturing from £3,856 million to £3,967 million. Over the year the Construction recorded a fall of 3.1% (£2,438 million to £2,363 million). The overall increase in GVA at basic prices over the year is higher than the annual average growth rate recorded over the period 2002-2006 (6.4%) but lower than the growth rate between 2005 and 2006 (9.7%).

Overall the Service sector accounts for 58.6% of GVA in 2007 up slightly from 56.2% in 2006, Manufacturing accounts for 23.0% down from 24.1% and Construction accounts for 13.7% down from 15.2%.

**Figure 6 – Total GVA at Basic Prices 2007 £ million**

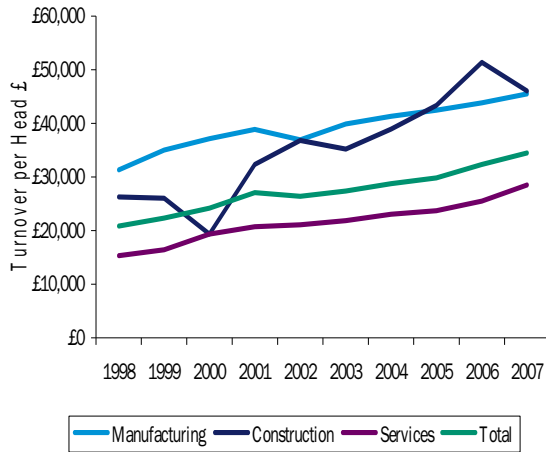


See page 9 for Industry classifications.



Within the Service sector Wholesale and Retail (£4,283 million) accounts for the greatest proportion of GVA – 24.9% of the total for NI in 2007, followed by Real Estate Renting and Business Activity (£2,750) at 16.0% - figure 6.

**Figure 7 – GVA at Basic Prices per Head by Section 1998-2007**



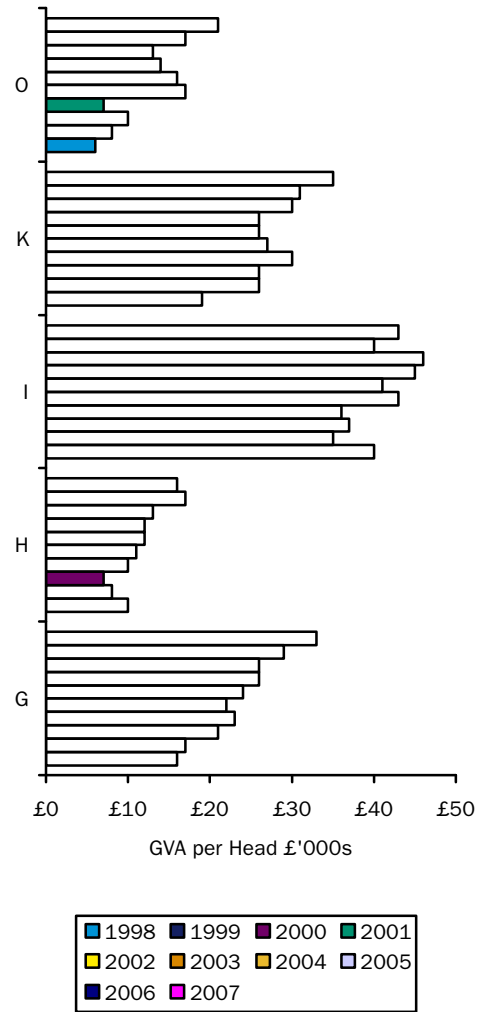
GVA at basic prices per head stood at £34,459 in 2007, an increase of 6.5% from £32,348 in 2006 – figure 7.

Within the three main industry sectors Construction has the highest GVA per head within NI at £46,020 and Services the lowest at £28,497 in 2007. Over the period 2006 to 2007 Services and Manufacturing recorded increases in GVA per head while Construction recorded a fall.

Within the Service sector GVA per head remains highest in the Transport Storage and Communication sector at £42,769 in 2007 – figure 8.

As with all the per head measures in this report, no account is taken of variation in full and part-time working patterns across sectors, and this should be borne in mind when interpreting differences.

**Figure 8 – GVA at Basic Prices per Head within Services 1998-2007**



- A&B** – Agriculture (Part), Hunting and Forestry, Fishing
- C** – Mining and Quarrying
- D** – Manufacturing
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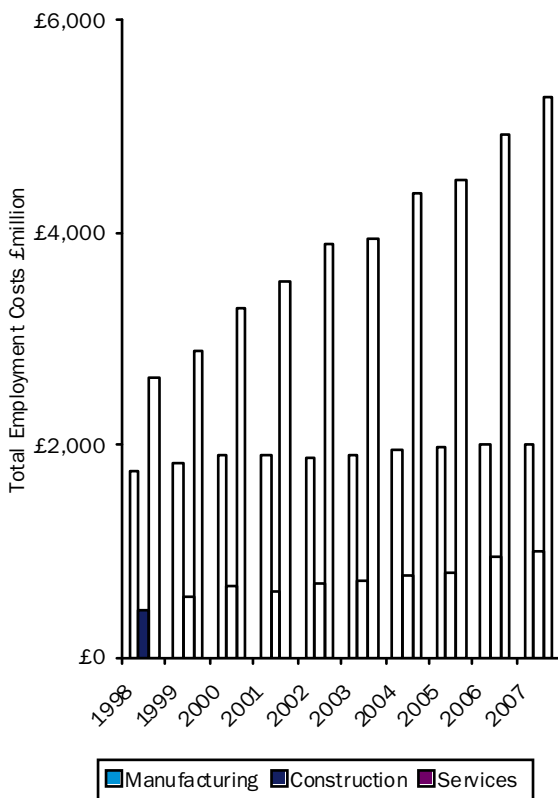
Details of GVA calculation applied can be found in the notes section at the end of this publication.

# Employment Costs

## 5

Employment costs represent the amounts paid during the year to, or on behalf of employees. This includes all overtime payments, bonuses, commissions, payments in kind, benefits in kind, holiday pay, employer's national insurance contributions, payments into pension funds by employers and redundancy payments less any amounts reimbursed for this purpose from government sources. No deduction is made for income tax or employee's national insurance contributions etc. Payment to working proprietors, travelling expenses, lodgings allowances etc. are excluded. These employment costs are not adjusted to take account of full and part-time working and are also calculated at a point in time rather than annual averages.

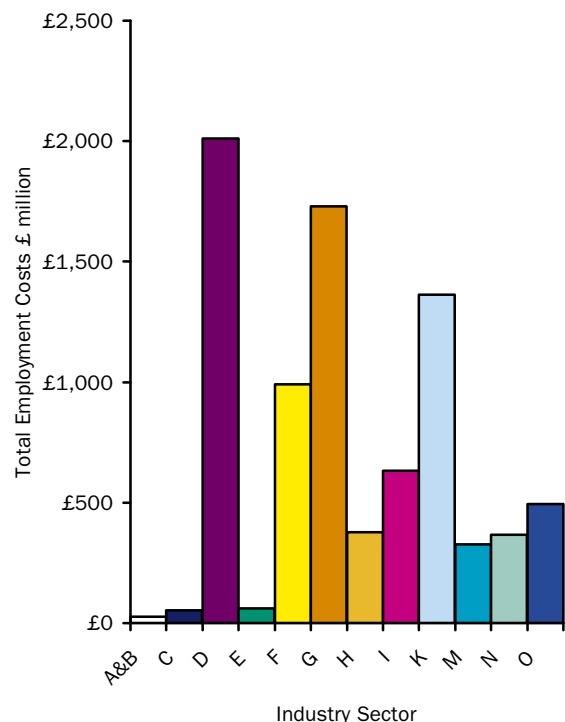
**Figure 9 – Total Employment Costs 1998-2007  
£ million**



From 2006 to 2007 overall employment costs have increased by 5.2% from £8,010 million in 2006 to £8,429 million in 2007. This is reflected with increases of 7.5% in Services 5.3% in Construction and 0.7% in Manufacturing – figure 9.

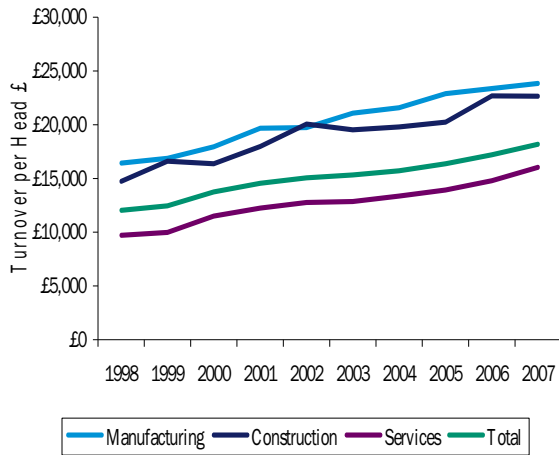
Within the Service sector employment costs are highest in the Wholesale and Retail sector at £1,730 million in 2007 – figure 10. Employment costs accounted for 48.9% of total GVA in 2007, similar to that for 2006 (50.0%).

**Figure 10 – Total Employment Costs 2007  
£ million**



See page 11 for Industry classifications.

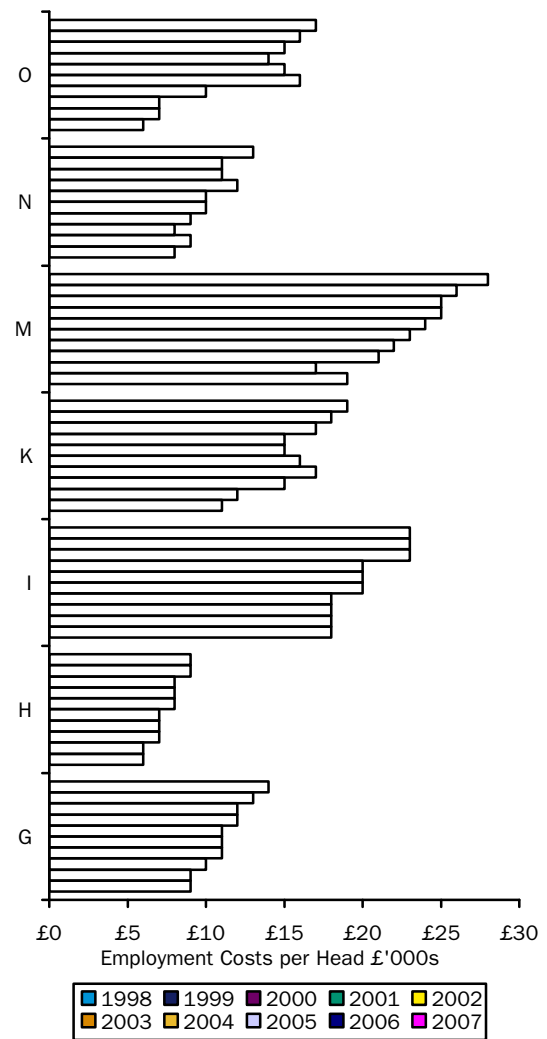
**Figure – 11 Employment Costs per Head by Section 1998-2007**



Employment costs per head continue to be lowest in the Service sector (£16,030) however it should be noted that the ABI does not take into account the greater number of part-time jobs within the Service sector – figure 11.

Within the Service sector employment costs per head vary from £27,899 in Education and £23,064 in Transport Storage and Communication to just £9,182 in Hotels and Restaurants.

**Figure 12 – Employment Costs per Head within Services 1998-2007**



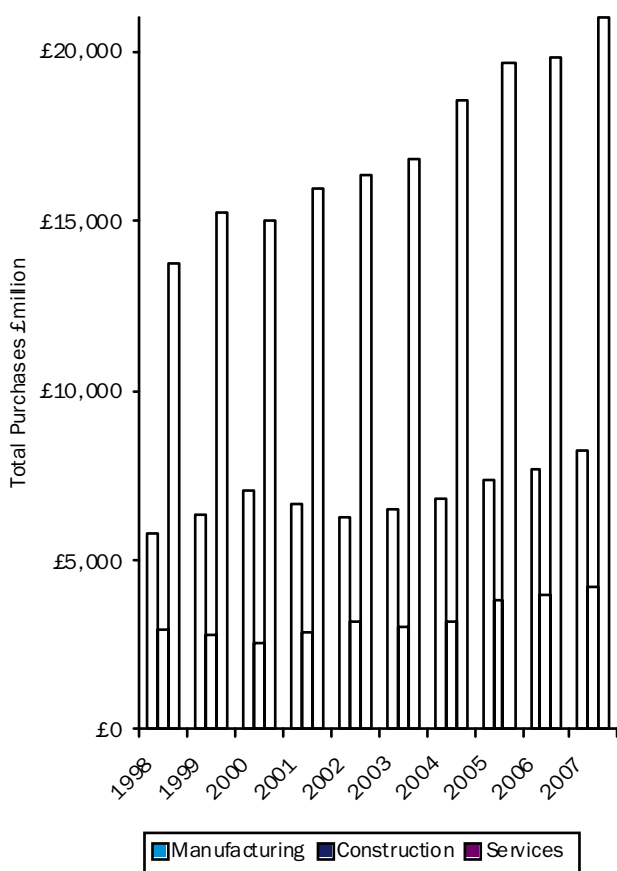
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# Purchases

## 6

Total Purchases represents the value of all goods, materials and services purchased during the year.

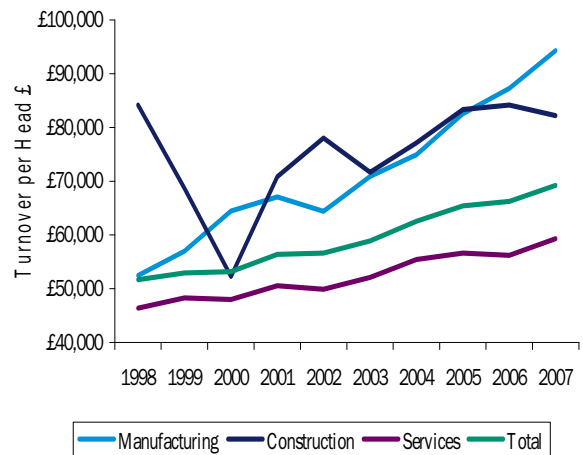
**Figure 13 – Total Purchases 1998-2007  
£ million**



Total purchases have increased by 5.5% over the year 2006 to 2007 from £32,801 to £34,610 – figure 13.

60.7% of the total is accounted for by the Service sector (£21,015) and a further 23.8% by the Manufacturing sector (£8,222).

**Figure 14 – Purchases per Head by Section 1998-2007**



Purchases per head have increased in the Manufacturing sector by 8.0% from £87,285 in 2006 to £94,297 in 2007. In the Services sector over the same period purchases per head increased by 5.5% from £56,205 to £59,298.

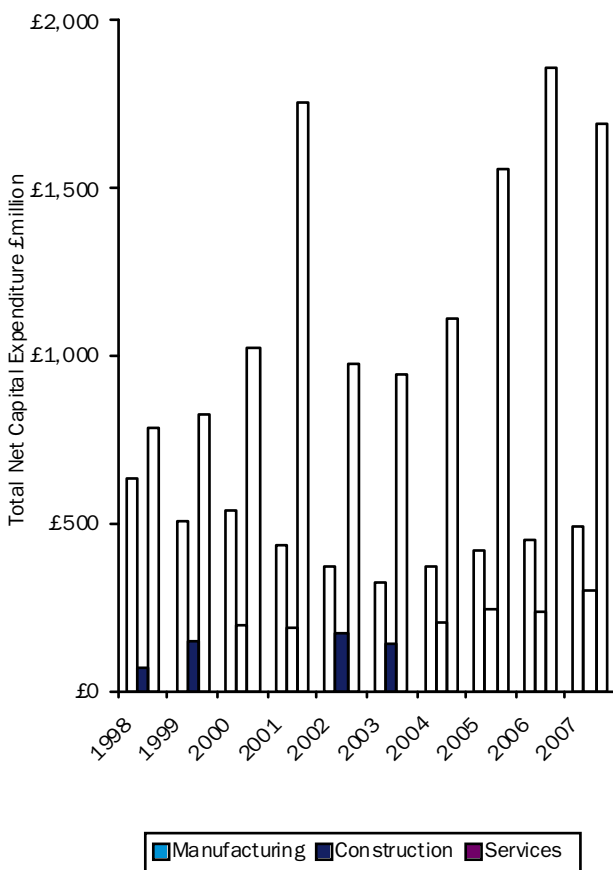
Construction sector purchases per head decreased by 2.3% from £84,136 in 2006 to £82,192 in 2007.

# Net Capital Expenditure

## 7

Net Capital Expenditure is calculated by adding to the value of new building work, acquisitions less disposals of land and existing buildings, vehicles and plant and machinery.

**Figure 15 – Net Capital Expenditure 1998-2007  
£ million**

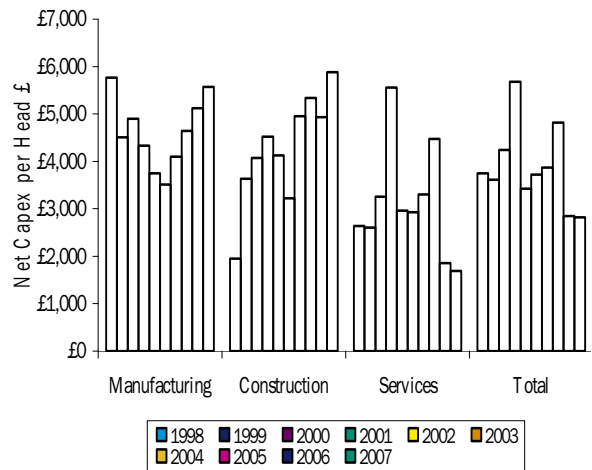


Net capital expenditure decreased from £2,849 million in 2006 to £2,823 in 2007 representing a 0.9% decrease – figure 15.

Net capital expenditure continues to be highest in the Service sector at £1,689 million, followed by Manufacturing £486 million and Construction £302 million.

During 2007 the Service sector accounted for 59.8% of total net capital expenditure.

**Figure 16 – Net Capital Expenditure per Head by Section 1998-2007**



Net capital expenditure per head was £5,648 in 2007 down by 1.8% from £5,755 in 2006 – figure 16.

# Results by Manufacturing Sub-Sector



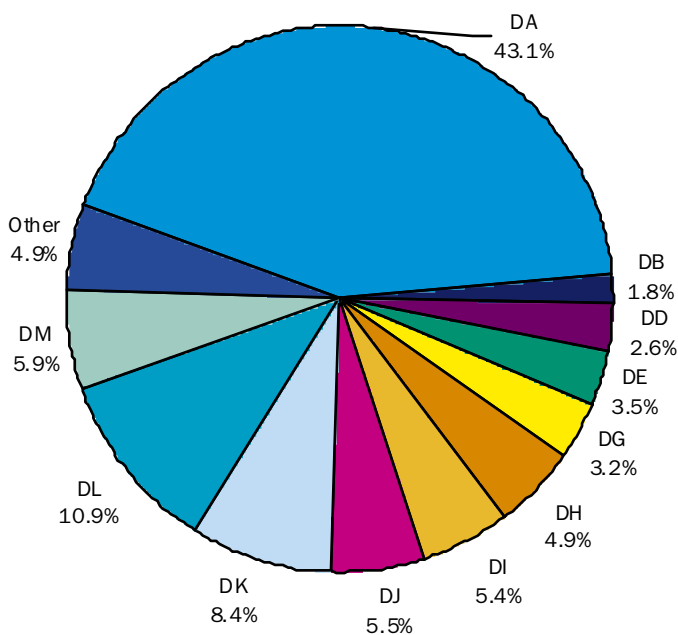
## TURNOVER

Just under half of Manufacturing turnover is accounted for by DA – Manufacture of Food Products; Beverages and Tobacco at £6,480 million in 2007, 43.1% of total Manufacturing turnover – figure 17.

The next largest sector was DL – Manufacture of Electrical and Optical Equipment, which had a turnover in 2007 of £1,635 million.

Over the period 2006 to 2007 total turnover has increased significantly in the following sectors, All Other Manufacturing (32.1%), DI - Manufacture of other Non-metallic Mineral Products (21.6%), DE – Manufacture of Pulp; Paper and Paper Products; Publishing and Printing (13.6%) and DK - Manufacture of Machinery and Equipment not elsewhere classified (13.3%).

**Figure – 17 Total Turnover by Manufacturing Sub-Sector 2007**



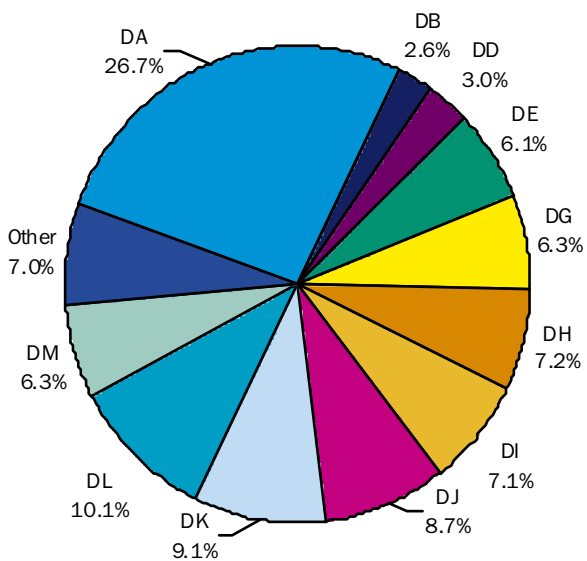
- DA – Manufacture of Food Products; Beverages and Tobacco
- DB – Manufacture of Textiles and Textile Products
- DD – Manufacture of Wood
- DE – Manufacture of Pulp; Paper and Paper Products; Publishing and Printing
- DG – Manufacture of Chemicals and Man-made Fibres
- DH – Manufacture of Rubber and Plastic Products
- DI – Manufacture of other Non-metallic Mineral Products
- DJ – Manufacture of Basic Metals and Fabricated Metal Products
- DK – Manufacture of Machinery and Equipment not elsewhere classified
- DL – Manufacture of Electrical and Optical Equipment
- DM – Manufacture of Transport Equipment
- Other – All Other Manufacturing

There have been decreases in DB – Manufacture of Textiles and Textile Products (16.5%), DH – Manufacture of Rubber and Plastic Products (14.9%) and DM – Manufacture of Transport Equipment Other – All Other Manufacturing (8.8%).

The largest increases in turnover in value terms were seen in Other – All Other Manufacturing up £178 million, DK – Manufacture of Machinery and Equipment not elsewhere classified up £148 million, DI – Manufacture of other Non-metallic Mineral Products up £144 million and DA – Manufacture of Food Products; Beverages and Tobacco £122 million.

In 2007 turnover per head in the Manufacturing sector was highest in DA - Manufacture of Food, Drink and Tobacco (£350,834).

**Figure 18 Total GVA by Manufacturing Sub Sector 2007**



See page 14 for Manufacturing sub-section classifications.

## GVA

Just over half of Manufacturing GVA in 2007 was accounted for by 4 sub-sectors (54.4%), DA – Manufacture of Food Products; Beverages and Tobacco (26.7%), DL – Manufacture of Electrical and Optical Equipment (10.1%), DK - Manufacture of Machinery and Equipment Not Elsewhere Classified (9.1%) and DJ – Manufacture of Basic Metals and Fabricated Metal Products (8.7%).

The largest fall in GVA recorded in the Manufacturing subsections was in DM – Manufacture of Transport Equipment which fell by £133 million 34.9% over the period 2006 to 2007.

On the other hand the largest increase was experienced by Other – All Other Manufacturing up £116 million (71.4) over the year.

In 2007 GVA per head in the Manufacturing sector was highest in DG – Manufacture of Chemicals, Chemical Products and Man-made Fibres (£77,694).

# Background Notes and Contact Details

## 9

The NIABI is a statutory survey and data is collected from Northern Ireland based companies by the Statistics Research Branch (Department of Enterprise, Trade and Investment) under the Statistics of Trade and Employment (Northern Ireland) Order 1988.

### Coverage

The results for 2007 cover most sectors within the NI economy. The main area excluded is Public Administration and Defence (SIC 75). Local authority and central Government bodies in Health and Social Work and Education, Public Sector Hospitals in NHS trusts (8511/1), medical and dental practices (8512 and 8513) and Charitable Social activities (8531/1 and 8532/1), and Financial Intermediation have also been excluded from this publication. The agriculture, forestry and fishing sector covers 01.4 (Agricultural and animal husbandry service activities, except veterinary activities) and Group 01.5 (Hunting, trapping and game propagation including related service activities), 02 (forestry, logging and related service activities) and 05 (fishing) – but does not include farming. In Production, (which includes Mining and Quarrying, Manufacturing and Electricity, Gas and Water Supply), all businesses employing twenty or more employees are selected to contribute to the survey, within the Construction sector all businesses employing fifty or more employees are selected and within Services, an employment threshold of one hundred employees is applied. Businesses falling below the threshold of complete enumeration are selected on a random stratified basis.

The Standard Industrial Classification sections covered by the 2007 NIABI data are as follows;

**A & B** – Agriculture (Part), Hunting and Forestry, Fishing

**C** – Mining and Quarrying

**D** – Manufacturing

**E** – Electricity, Gas and Water Supply

**F** – Construction

**G** – Wholesale and Retail Trade, Repair of Motor Vehicles, Motorcycles and Personal and Household Goods

**H** – Hotels and Restaurants

**I** – Transport Storage and Communication

**K** – Real Estate, Renting and Business Activity

**M** - Education (Excludes local authority and central government bodies)

**N** - Health and Social Work (Excludes all local authority and central government bodies in 8511/2, 8511/3, 8514, 8520, 8531/2 and 8532/2. The following classes and subclasses are also excluded from the financial variables: Public Sector Hospitals in NHS trusts (8511/1), medical and dental practices (8512 and 8513), Charitable Social Work activities with accommodation (8531/1) and without accommodation (8532/1)

**O** – Other Community, Social and Personal Service Activities

**G, H, I, K, M, N, O** – Service Sector

### Response Rate

The response rate for the 2007 survey was 82.1%.

### Method

The Inter Departmental Business Register (IDBR) is the sampling frame used for the NIABI. The register consists of companies, partnerships, sole proprietors, public authorities, central government departments, local



authorities and non-profit making bodies in the UK. The reporting units on IDBR hold the addresses to which the NIABI form is sent and may cover one or more local units. A local unit is an individual site (factory, shop, office etc) at which business is conducted. The forms were issued by and returned to Statistics Research Branch. Data validation was carried out on the returned forms ensuring internal consistency within the form, checking data fell within expected limits or by contacting the company for clarification where appropriate. For non-returns above the selected employment threshold, data was imputed using methodology, which takes account of previous returned data and the performance of other similar businesses. The returned and imputed data is at reporting unit level, which may cover a number of local units. This data is then apportioned to each local unit according to its industrial classification and sizeband. The local unit data is used to gross all local units in the population by industrial classification and employment sizeband.

### **Period covered**

For the 2007 ABI, businesses were asked to make returns for the calendar year 2007, but where this was not possible, returns for business years ending between 6 April 2007 and 5 April 2008 were accepted. Similar procedures operated in previous years. Returns covering fewer than twelve months were accepted for businesses, which had started or ceased trading during the year.

### **Disclosure**

The inquiry is conducted under the Statistics of Trade and Employment (Northern Ireland) Order 1988 and great care is taken to avoid disclosing information about individual enterprises (in line with the stipulations in Article 7 of the order). Figures which would be likely to disclose particulars relating to an enterprise are not published (i.e. they are suppressed) unless prior written consent for their publication has been obtained directly from the business.

## **DEFINITIONS**

### **Approximate Gross Value Added at Basic prices**

Approximate gross value added at basic prices represents the income generated by businesses, out of which is paid wages and salaries, the cost of capital investment and financial charges before arriving at a figure for profit. It includes taxes on production (e.g. business rates), net of subsidies but excludes subsidies and taxes on products (e.g. VAT and excise duty). This is an output-based measure of GVA. All published GVA is given at basic prices. Please find below calculation applied to derive GVA.

The calculations used in the NIABI are:

- GVA AT BASIC PRICES - GVA at factor cost + business rates + vehicle excise duty
- GVA AT MARKET PRICES - Total turnover + insurance claims + change in stocks + own account capex – total purchases
- GVA AT FACTOR COST - GVA at market prices + subsidies - total taxes + customs & excise drawback

(Please note the GVA at basic prices is the only published GVA from the NIABI).

### **Turnover**

Turnover is defined as total sales and work done. This is calculated by adding to the value of sales of goods produced, goods purchased and resold without further processing, work done and industrial and non-industrial services rendered.

## **Employment Costs**

Other useful information contained within the ABI includes employment costs. This represents amounts paid during the year to employees without any deduction for income tax or employee's national insurance contributions etc. This includes all overtime payments, bonuses, commissions, payments in kind, benefits in kind, holiday pay, employer's national insurance contributions, payments into pension funds by employers and redundancy payments, less any amounts reimbursed for this purpose from government sources. No deduction is made for income tax or employee's national insurance contributions etc. Payment to working proprietors, travelling expenses, lodgings allowances etc. are excluded.

## **Purchases and Capital Expenditure**

Purchases represent the value of all goods, materials and services purchased during the year and net capital expenditure is calculated by adding to the value of new building work, acquisitions less disposals of land and existing buildings, vehicles and plant and machinery.

## **Northern Ireland ABI, UK National Estimates and the ONS Regional ABI**

The current Northern Ireland Annual Business Inquiry report has been produced using separate business sites ("Local Units") as the unit of analysis for key variables whereas the UK National estimates (including the Northern Ireland component) published on the 17<sup>th</sup> November 2008 treats multi-site organisations as single entities (i.e. based on "Reporting Units"). NIABI information is included into the UK National (and later Regional) estimates and since 2002 is constrained to NI Reporting Unit totals.

## **ABI "Approximate Gross Value Added" and "Regional Gross Value Added"**

The financial information from the Regional ABI provides a measure of approximate GVA, which is ultimately used to contribute to the picture of the whole economy to be built up for National Accounts purposes at the United Kingdom level. When regional economic accounts are subsequently derived the resulting measure of Regional Gross Value Added (GVA) is a much broader based measure relating to the whole economy in a region taking into account information from a series of economic and labour market surveys. The results of the ABI only comprise one element of the regional economic account figures and a number of adjustments are made in line with National Accounts methodologies before estimates of Regional GVA are produced. The most recent Regional GVA estimates for Northern Ireland at industry level by ONS relate to 2007 were released on 12<sup>th</sup> December 2008. The ABI provides more detailed industry information than is possible in Regional Accounts measures.

## **Further Information**

The data released in the summary results in the current report cover the basic variables by standard industrial classification at section level. There are further variables and more detailed industrial breakdowns available (subject to confidentiality constraints). There is also a facility to provide bespoke analysis relating to employment or turnover sizebands, on request.

If you wish to receive further NIABI information or to register your interest for some further analysis please e-mail [abihelpline@detini.gov.uk](mailto:abihelpline@detini.gov.uk) telephone 028 90529656, Fax 028 90529658, Textphone 028 90529304, write to Statistics Research Branch, Netherleigh, Massey Avenue, BELFAST BT4 2JP or look up our website [www.statistics.detini.gov.uk](http://www.statistics.detini.gov.uk).

TABLE 1 NIABI RESULTS BY SECTION 2001-2007

	Standard Industrial Classification <sup>1</sup>	Description	Turnover	Turnover per Head	Gross Value Added (GVA) At Basic Prices	Gross Value Added (GVA) At Basic Prices Per head	Employment Costs	Employment Costs per Head	Purchases	Purchases per Head	Net Capital Expenditure	Net Capital Expenditure Per Head	Employment <sup>5</sup>
			£Million	£	£Million	£	£Million	£	£Million	£	£Million	£	
2002	A/B <sup>2</sup>	Agriculture	153	53478	58	20316	23	13725	92	32029	14	4744	2858
2003		Hunting, Forestry	96	40088	55	22802	22	12570	35	14674	8	3460	2400
2004		and Fishing	90	47301	42	21931	22	15660	44	23442	7	3735	1897
2005			105	44431	58	24550	23	15738	47	19687	5	2173	2374
2006			144	55318	67	25816	34	16200	80	30694	9	3623	2611
2007			154	52333	81	27385	27	14481	75	25387	18	6039	2940
2001		C	Mining and	221	122829	75	41595	33	18860	139	77164	17	9638
2002	Quarrying		224	111597	70	34739	40	20845	151	75083	21	10590	2009
2003			269	133184	77	37965	43	22125	194	96154	24	11726	2021
2004			249	124814	78	38883	43	21949	159	79879	12	6099	1995
2005			242	129347	82	43862	40	22451	155	83026	23	12329	1872
2006			266	137239	92	47264	45	24280	175	90390	20	10287	1938
2007			317	139650	84	37012	53	24227	233	102438	23	10217	2271
2001	D	Manufacturing	13635	136683	3880	38890	1902	19666	6690	67060	433	4337	99756
2002			13100	133864	3612	36913	1868	19733	6304	64413	367	3746	97862
2003			13287	144460	3670	39903	1896	21078	6522	70911	323	3511	91976
2004			13653	149318	3776	41296	1943	21565	6854	74963	375	4098	91435
2005			14116	158267	3786	42451	1973	22900	7363	82549	414	4647	89194
2006			14472	164473	3856	43827	1995	23363	7680	87285	451	5123	87989
2007			15031	172396	3967	45493	2010	23823	8222	94297	486	5576	87190
2001	E	Electricity, Gas	976	420778	661	285118	87	37444	415	178974	241	104057	2319
2002		and Water Supply	1080	359061	369	122741	113	37762	783	260069	85	28388	3009
2003			1059	330152	392	122198	131	40849	765	238463	291	90848	3206
2004			1222	432137	417	147618	118	41984	890	314961	131	46391	2827
2005			1354	492472	455	165591	105	38079	979	356028	117	42583	2750
2006			1390	734212	560	296048	76	40419	1018	537638	276	146067	1893
2007			1347	782842	632	367026	60	34949	845	491201	305	177319	1721

	Standard Industrial Classification <sup>1</sup>	Description	Turnover	Turnover per Head	Gross Value Added (GVA) At Basic Prices	Gross Value Added (GVA) At Basic Prices Per head	Employment Costs	Employment Costs per Head	Purchases	Purchases per Head	Net Capital Expenditure	Net Capital Expenditure Per Head	Employment <sup>5</sup>
			£Million	£	£Million	£	£Million	£	£Million	£	£Million	£	
2001	F	Construction	3995	98270	1315	32339	616	17966	2879	70816	184	4525	40658
2002			4315	106797	1486	36789	695	20072	3152	78013	167	4126	40401
2003			4348	102875	1487	35178	722	19518	3029	71674	136	3225	42268
2004			4660	113384	1600	38927	772	19792	3170	77134	204	4953	41103
2005			5474	118764	1996	43310	785	20243	3842	83353	246	5337	46091
2006			6171	130003	2438	51362	940	22671	3994	84136	234	4932	47467
2007			6142	119615	2363	46020	990	22650	4221	82192	302	5881	51350
2001	G	Wholesale and	14972	119713	2833	22650	1229	10884	12326	98554	248	1981	125070
2002		Retail	15062	116144	2838	21885	1268	10645	12276	94657	280	2159	129684
2003			15965	122902	3151	24254	1331	10806	12780	98380	346	2660	129900
2004			17013	130888	3413	26260	1476	11623	13626	104829	393	3023	129982
2005			17966	134412	3462	25898	1464	11816	14570	109007	307	2296	133662
2006			18110	139502	3822	29442	1567	12803	14415	111039	332	2559	129821
2007			19709	150043	4283	32608	1730	14080	15641	119074	415	3156	131357
2001	H	Hotels and	943	24923	372	9826	257	7302	564	14919	100	2652	37822
2002		Restaurants	1125	26684	461	10923	283	7252	643	15235	113	2689	42178
2003			1146	28640	475	11863	307	7927	662	16544	117	2927	40012
2004			1167	27641	525	12433	314	7569	654	15501	57	1349	42203
2005			1269	28837	575	13074	328	8036	693	15757	109	2473	43995
2006			1367	31252	732	16730	352	8574	649	14827	137	3132	43756
2007			1434	32459	712	16107	377	9182	728	16482	311	7030	44179
2001	I	Transport,	2161	74192	1063	36496	492	17963	1128	38712	261	8962	29133
2002		Storage and	2468	84531	1262	43216	539	19580	1259	43114	222	7604	29195
2003		Communication	2185	80930	1110	41097	525	20033	1106	40964	157	5798	27000
2004			2498	89656	1259	45191	557	20335	1320	47389	192	6906	27861
2005			2544	98083	1196	46119	564	22828	1467	56548	235	9062	25940
2006			2725	96726	1139	40413	624	22828	1661	58962	189	6705	28175
2007			2767	95195	1243	42769	631	23064	1600	55046	239	8231	29066

	Standard Industrial Classification <sup>1</sup>	Description	Turnover	Turnover per Head	Gross Value Added (GVA) At Basic Prices	Gross Value Added (GVA) At Basic Prices Per head	Employment Costs	Employment Costs per Head	Purchases	Purchases per Head	Net Capital Expenditure	Net Capital Expenditure Per Head	Employment <sup>5</sup>
			£Million	£	£Million	£	£Million	£	£Million	£	£Million	£	
2001	K	Real Estate	2710	46457	1771	30364	857	16572	962	16492	934	16014	58338
2002		Renting and	2251	38644	1566	26887	828	15833	797	13683	139	2386	58240
2003		Business Activities	2478	39734	1594	25567	871	15488	896	14373	161	2585	62363
2004			3198	47089	1736	25563	994	15375	1591	23426	214	3153	67921
2005			3889	53534	2185	30075	1110	17032	1725	23745	680	9365	72641
2006			3723	48303	2365	30686	1255	17773	1581	20512	903	11720	77069
2007			4144	53007	2750	35176	1363	19497	1456	18623	395	5049	78183
2001	M3	Education	149	14270	*	*	230	22293	125	11975	36	3476	10444
2002			*	*	*	*	249	22997	*	*	40	3696	10921
2003			124	11621	*	*	256	24108	129	12103	45	4235	10645
2004			165	14945	*	*	277	25043	137	12398	67	6091	11061
2005			149	12477	*	*	296	24997	136	11370	63	5308	11945
2006			183	15406	*	*	310	26419	159	13374	80	6774	11877
2007			192	16257	*	*	326	27899	151	12769	84	7144	11803
2001	N4	Health and Social	364	14006	*	*	220	8713	131	5028	141	5428	25966
2002		Work	*	*	*	*	247	9659	*	*	74	2800	26296
2003			381	15615	*	*	246	10271	102	4170	38	1569	24430
2004			495	18657	*	*	325	12378	150	5669	55	2088	26537
2005			496	18054	*	*	303	11339	135	4919	87	3153	27450
2006			545	17610	*	*	337	11201	157	5087	88	2838	30961
2007			565	19309	*	*	366	12869	171	5857	124	4241	29280
2001	O	Other	952	32902	209	7211	263	9698	711	24555	34	1178	28947
2002		Community,	1366	42872	553	17359	474	15801	1167	36644	105	3287	31860
2003		Social and	1388	48373	451	15708	401	14613	1155	40229	83	2884	28702
2004		Personal service	1266	42779	400	13526	427	14487	1089	36791	128	4335	29588
2005		Activities	1064	33563	409	12892	427	14657	928	29271	74	2323	31707
2006			1468	46467	528	16726	474	16006	1232	38990	129	4082	31589
2007			1563	51206	656	21489	495	17336	1267	41516	122	3982	30524

	Standard Industrial Classification <sup>1</sup>	Description	Turnover	Turnover per Head	Gross Value Added (GVA) At Basic Prices	Gross Value Added (GVA) At Basic Prices Per head	Employment Costs	Employment Costs per Head	Purchases	Purchases per Head	Net Capital Expenditure	Net Capital Expenditure Per Head	Employment <sup>5</sup>
			£Million	£	£Million	£	£Million	£	£Million	£	£Million	£	
2001	NI	Total of Above	41223	88898	12547	27057	6219	14566	26134	56358	2635	5683	463708
2002			41602	87673	12519	26382	6625	15053	26857	56598	1627	3428	474515
2003			42727	91901	12740	27402	6750	15336	27375	58881	1729	3719	464923
2004			45676	96279	13637	28746	7269	15711	29687	62576	1836	3871	474410
2005			48669	99400	14602	29824	7419	16366	32040	65438	2360	4821	489621
2006			50564	102120	16017	32348	8010	17205	32801	66245	2849	5755	495145
2007			53366	106762	17225	34459	8429	18174	34610	69238	2823	5648	499864
2001	Services	Services -	22252	70480	6540	20714	3549	12237	15947	50509	1755	5558	315719
2002		G,H,I,K,M,N,O	22730	69219	6923	21082	3886	12773	16376	49871	973	2963	328375
2003			23667	73262	7059	21853	3936	12851	16829	52095	946	2930	323052
2004			25802	76986	7725	23049	4370	13350	18568	55400	1108	3304	335153
2005			27376	78817	8224	23677	4493	13938	19654	56584	1555	4476	347341
2006			28122	79609	9003	25488	4919	14779	19854	56205	1859	5262	353248
2007			30375	85709	10099	28497	5289	16030	21015	59298	1689	4766	354392

<sup>1</sup> Data for 1999-2002 are available on SIC 1992 basis, data for 2003 and after are available on SIC 2003 basis.

<sup>2</sup> In 2001 coverage was increased to include Group 01.4 (Agricultural and animal husbandry service activities, except veterinary activities) and Group 01.5 (Hunting, trapping and game propagation including related service activities). 02 (forestry, logging and related service activities) and 05 (fishing) are also included.

<sup>3</sup> Excludes local authority and central government bodies.

<sup>4</sup> Excludes local authority and central government bodies in 8511/2, 8511/3, 8514, 8520, 8531/2 and 8532/2, as well as Public Sector Hospitals in NHS trusts (8511/1), medical and dental practices (8512 and 8513) and Charitable Social activities (8531/1 and 8532/1).

<sup>5</sup> For all survey years up to and including 2005 employment was collected for a December point in time. From 2006 onwards this has shifted to a September point in time – this may have resulted in seasonal effects influencing year on year changes between 2005 and 2006.

\* Data suppressed to avoid disclosure

TABLE 2 NIABI RESULTS BY MANUFACTURING SUB-SECTION 2006-2007

	Standard Industrial Classification <sup>1</sup>	Description	Turnover	Turnover per Head	Gross Value Added (GVA) At Basic Prices	Gross Value Added (GVA) At Basic Prices Per head	Employment Costs	Employment Costs per Head	Purchases	Purchases per Head	Net Capital Expenditure	Net Capital Expenditure Per Head	Employment
			£Million	£	£Million	£	£Million	£	£Million	£	£Million	£	
2006	DA	Manufacture of Food Products; Beverages and Tobacco	6358	337067	1055	55926	376	20246	2272	120474	80	4246	18861
2007			6480	350834	1057	57245	389	21455	2484	134470	82	4418	18469
2006	DB	Manufacture of Textiles and Textile Products	323	93423	105	30433	65	19479	210	60847	*	*	3453
2007			269	90882	103	34734	68	24137	169	57135	5	1795	2964
2006	DC	Manufacture of Leather and Leather Products	3	57539	2	35460	1	11957	1	24022	*	*	54
2007			*	*	*	*	*	*	*	*	*	*	*
2006	DD	Manufacture of Wood and Wood Products	397	95885	131	31527	72	18723	269	64932	15	3557	4141
2007			396	103946	120	31414	78	21673	286	75119	21	5627	3810
2006	DE	Manufacture of Pulp, Paper and Paper Products; Publishing and Printing	464	82468	232	41195	122	22321	234	41530	26	4688	5627
2007			527	94679	242	43376	136	25154	286	51356	47	8411	5570

	Standard Industrial Classification <sup>1</sup>	Description	Turnover	Turnover per Head	Gross Value Added (GVA) At Basic Prices	Gross Value Added (GVA) At Basic Prices Per head	Employment Costs	Employment Costs per Head	Purchases	Purchases per Head	Net Capital Expenditure	Net Capital Expenditure Per Head	Employment
			£Million	£	£Million	£	£Million	£	£Million	£	£Million	£	
2006	DF	Manufacture of Coke, Refined Petroleum Products and Nuclear Fuel	17	335293	5	100005	1	25973	12	228131	0	9615	51
2007			*	*	*	*	*	*	*	*	*	*	*
2006	DG	Manufacture of Chemicals, Chemical Products and Man-Made Fibres	451	138826	237	72946	82	25317	219	67361	33	10218	3249
2007			478	149392	249	77694	83	26298	231	72287	19	5944	3201
2006	DH	Manufacture of Rubber and Plastics Products	871	116032	287	38286	175	24029	590	78551	31	4185	7508
2007			741	114904	287	44437	149	23549	461	71443	25	3814	6453
2006	DI	Manufacture of Other Non-Metallic Mineral Products	667	113392	250	42519	134	23364	427	72635	53	9087	5884
2007			811	120323	280	41476	156	23988	533	79113	76	11210	6743
2006	DJ	Manufacture of Basic Metals and Fabricated Metal Products	795	92285	309	35886	164	20652	525	60892	60	7020	8615
2007			821	95674	344	40020	176	22209	489	56940	27	3147	8584



	Standard Industrial Classification <sup>1</sup>	Description	Turnover	Turnover per Head	Gross Value Added (GVA) At Basic Prices	Gross Value Added (GVA) At Basic Prices Per head	Employment Costs	Employment Costs per Head	Purchases	Purchases per Head	Net Capital Expenditure	Net Capital Expenditure Per Head	Employment
			£Million	£	£Million	£	£Million	£	£Million	£	£Million	£	
2006	DK	Manufacture of Machinery and Equipment Not Elsewhere Classified	1109	167932	355	53705	186	28881	767	116194	27	4061	6602
2007			1256	178580	360	51154	189	27154	905	128654	39	5512	7035
2006	DL	Manufacture of electrical and Optical Equipment	1516	166555	351	38599	236	26288	1152	126567	66	7225	9104
2007			1635	178393	399	43503	252	27893	1213	132358	90	9830	9168
2006	DM	Manufacture of Transport Equipment	964	98157	381	38790	293	30031	621	63182	23	2324	9825
2007			880	98387	248	27757	236	26782	662	74044	28	3154	8943
2006	DN	Manufacture Not Elsewhere Classified	537	107017	156	31135	88	18751	381	76084	32	6407	5014
2007			702	114337	273	44497	96	17044	473	77142	27	4451	6138

<sup>1</sup> Data for 1999-2002 are available on SIC 1992 basis, data for 2003 and after are available on SIC 2003 basis.

\* Data suppressed to avoid disclosure.