# Key figures on European business

2022 edition


KEY FIGURES

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# Key figures on European business

2022 edition

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# Foreword

*Key figures on European business* presents a selection of key business statistics indicators for the European Union (EU), its individual Member States and European Free Trade Association (EFTA) countries, drawing from the rich collection of data that are available at Eurostat. Business statistics can be used to describe the structure, conduct and performance of businesses in the EU at a detailed sectoral level or they can be used to analyse emerging trends within the EU's business economy, tracing monthly or quarterly developments for indicators such as output, output prices or labour input.

*Key figures on European business* has been conceived to offer a balanced set of indicators. It starts with an overview of the business economy, followed by more detailed analyses that focus on four specific parts of the business economy – industry, construction, distributive trades and other non-financial services – while the publication closes with a chapter on tourism. Each of these chapters focusing on different parts of the business economy starts with an overview of the economic structure (in value added and employment terms) and continues with information on annual developments through to 2021; these chapters end with a focus on the latest developments, based on monthly data.

The COVID-19 pandemic and related restrictions have impacted on almost every aspect of life in the EU (and further afield) since March 2020. Monthly data for 2020 and to a lesser extent 2021 show this impact. The most recent data for 2022 may be impacted by a wider range of issues, for example aftereffects of the COVID-19 crisis on supply chains and early impacts from the Russian military aggression against Ukraine and the related sanctions.

Eurostat's most up-to-date statistics showing the economic and social impacts of various recent events can be found online at: https://ec.europa.eu/eurostat/web/covid-19/overview and at https://ec.europa.eu/eurostat/cache/dashboard/euro-indicators/

I hope that you find this publication interesting and useful.

**Sophie Limpach**
Director of business and trade statistics, Eurostat

# Abstract

*Key figures on European business* presents a selection of key business statistics indicators for the European Union (EU) and its individual Member States, as well as the EFTA countries. This publication may be viewed as an introduction to European business statistics and provides a starting point for those who wish to explore the wide range of data that are freely available on Eurostat's website at https://ec.europa.eu/eurostat together with a range of online articles in *Statistics Explained*.

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## For more information please consult

Eurostat's website: https://ec.europa.eu/eurostat
Statistics Explained: https://ec.europa.eu/eurostat/statistics-explained

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# Introduction

Eurostat is the statistical office of the European Union (EU) situated in Luxembourg. Its mission is to provide high quality statistics for Europe, which allow us to have the key information on Europe's economy, society and environment that we need both as citizens and as decision makers.

*Key figures on European business* describes the situation in the EU's business economy. As a consequence, only initial findings of the COVID-19 related impact on the business economy are provided: short-term statistics are generally presented through to the end of 2021 or the beginning of 2022. The full scale of the impact of the crisis will only be revealed at a later date, not only when the pandemic has come to an end but also when structural business statistics become available (generally some 18 months after the end of each calendar year).

## Structure of the publication

*Key figures on European business* provides users of official statistics with an overview of the wealth of information that is available on Eurostat's website and within its online databases concerning the business economy.

The publication is divided into an overview for the whole of the business economy, a presentation of the structure of the business economy, four chapters focusing on separate parts of the business economy (industry, construction, distributive trades and other non-financial services), and a final chapter focusing on tourism.

Each of the four chapters focusing on different parts of the business economy starts with an overview of their structure. They continue with information on annual developments from 2000 or 2005 through until 2020 or 2021 (the latest year for which annual indices are available at the time of writing). Three of these chapters also include information focused on a particular aspect: high-tech sectors and products for industry, buildings for construction, and information and communication services for other non-financial services. These four chapters finish with an analysis of the latest developments through to early 2022. Although based on different data sources, the tourism chapter follows a similar structure.

# Data extraction and coverage

## Data extraction

The statistical data presented in this publication were generally extracted in April 2022. The data in the final sections of Chapters 3 to 7 pertaining to the latest developments were extracted in June 2022. Eurostat's online database may contain revised data.

## Spatial data coverage

This publication presents information for the EU (a sum/average covering the 27 Member States of the EU) as well as the individual EU Member States and EFTA countries. The order of the countries in the figures usually reflects their ranking according to the values for (one of) the indicator(s) illustrated.

References in the publication to EU Member States being in northern, eastern, southern or western Europe are based on groupings provided by EU vocabularies (https://op.europa.eu/en/web/eu-vocabularies/concept-scheme/-/resource?uri=http://eurovoc.europa.eu/100277).

The map on the inside cover page identifies the EU Member States and the EFTA countries, as well as pinpointing their capital cities.

## Country codes

| | | | |
|---|---|---|---|
| BE | Belgium | HU | Hungary |
| BG | Bulgaria | MT | Malta |
| CZ | Czechia | NL | the Netherlands |
| DK | Denmark | AT | Austria |
| DE | Germany | PL | Poland |
| EE | Estonia | PT | Portugal |
| IE | Ireland | RO | Romania |
| EL | Greece | SI | Slovenia |
| ES | Spain | SK | Slovakia |
| FR | France | FI | Finland |
| HR | Croatia | SE | Sweden |
| IT | Italy | | |
| CY | Cyprus | IS | Iceland |
| LV | Latvia | LI | Liechtenstein |
| LT | Lithuania | NO | Norway |
| LU | Luxembourg | CH | Switzerland |

## Temporal data coverage

If data for a reference year (or reference period) are not available for a particular country, then efforts have been made to complete the coverage using data for recent previous reference years (these exceptions are footnoted).

## Economic activity coverage

The statistical classification of economic activities in the European Community (NACE Rev. 2) is used to define economic activities. Within this publication, the following terms related to a range of economic activities are applied – all based on the NACE Rev. 2 classification:

- All economic activities – Sections A to U.
- Business economy – covers (as defined by Sections B to N and Division 95): industry, construction, distributive trades and most other services.
- Non-financial business economy – covers (as defined by Sections B to J and L to N and Division 95): industry, construction, distributive trades and most other services outside of financial services.
- Core innovation activities – covers (as defined by Sections B to E, H, J, K and Divisions 46 and 71 to 73): industry; transportation and storage services; information and communication services; financial and insurance activities; wholesale trade; architectural and engineering activities, technical testing and analysis; scientific research and development; advertising and market research.
- Industry – covers (as defined by Sections B to E): mining and quarrying; manufacturing; electricity, gas, steam and air conditioning supply; water supply, sewerage, waste management and remediation activities.
- Manufacturing – Section C.
- High-tech manufacturing – covers (as defined by Divisions 21 and 26 and Group 30.3): the manufacture of basic pharmaceutical products and pharmaceutical preparations; the manufacture of computer, electronic and optical products; the manufacture of air and spacecraft and related machinery.

- Construction – covers (as defined by Section F): the construction of buildings; civil engineering; specialised construction activities.
- Non-financial services – covers (as defined by Sections G to J and L to N and Division 95): distributive trades and most other services outside of financial services.
- Non-financial services as used for short-term business statistics in Chapter 6 (sections on 'Developments' and 'Latest developments') – covers (as defined by Sections H to J, Divisions 69, 71, 73, 74, 78, 79, 80 and 82, and Groups 70.2 and 81.2): transportation and storage services; accommodation and food service activities; information and communication services; professional, scientific and technical activities (other than activities of head offices, scientific research and development, and veterinary activities); administrative and support service activities (other than rental and leasing activities, combined facilities support activities, and landscape service activities).
- Other non-financial services – covers (as defined by Sections H to J and L to N and Division 95): most services outside of distributive trades and financial services.
- Core innovation services – covers (as defined by Sections H, J, K and Divisions 46 and 71 to 73): transportation and storage services; information and communication services; financial and insurance activities; wholesale trade; architectural and engineering activities, technical testing and analysis; scientific research and development; advertising and market research.
- Distributive trades – covers (as defined by Section G): wholesale and retail trade; repair of motor vehicles and motorcycles.
- Information and communication services – covers (as defined by Section J): publishing activities; motion picture, video and television programme production, sound recording and music publishing activities; programming and broadcasting activities; telecommunications; computer programming, consultancy and related activities; information service activities.
- Tourist accommodation – covers (as defined by Groups 55.1 to 55.3): hotels and similar accommodation; holiday and other short-stay accommodation; camping grounds, recreational vehicle parks and trailer parks.

For more information about the NACE Rev. 2 classification, please refer to: https://ec.europa.eu/eurostat/web/nace-rev2/overview.

## Notes and flags

Notes and flags are means of explaining and defining specific characteristics of particular data. This publication includes only the main notes required for interpretation of the data and to highlight when a year has been replaced with another. Data that are not shown in individual figures may be simply not available or they may be confidential (in which case they are not published). A full set of notes and flags are available on Eurostat's website (see below) via the online data code(s).

## Accessing European statistics

The simplest way to obtain Eurostat's wide range of statistical information is through its website (https://ec.europa.eu/eurostat). Eurostat provides users with free access to its databases and its publications in portable document format (PDF). The website is updated daily and presents the latest and most comprehensive statistical information available on the EU, its Member States, the EFTA countries, as well as enlargement countries and potential candidates.

Eurostat online data codes, such as *sbs_na_sca_r2*, allow easy access to the most recent data on Eurostat's website (https://ec.europa.eu/eurostat/data/database). In this publication these online data codes are given as part of the source below each figure.

Some of the indicators presented in this publication are relatively complex. Statistics Explained provides a comprehensive online glossary with definitions for a broad range of statistical indicators, concepts and terms; it is organised under thematic headings (https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Thematic_glossaries).

# 1 Business dynamics

# Size of businesses

**Business statistics cover industry, construction, distributive trades and most other services. It is important to underline that they exclude a range of economic activities, such as: agriculture, forestry and fishing; public administration; education; health and social work; arts, entertainment and recreation. Alongside these, financial and insurance activities are also frequently excluded, given their specific nature and the limited availability of statistics in this area.**

## Key business statistics for the non-financial business economy

(EU, 2019)


In 2019, there were 23.2 million enterprises in the EU's non-financial business economy. Collectively they employed 131.5 million people and created €6 852 billion of wealth as measured by value added at factor cost.

Note: the non-financial business economy covers industry, construction, distributive trades and most other market services outside of financial services.

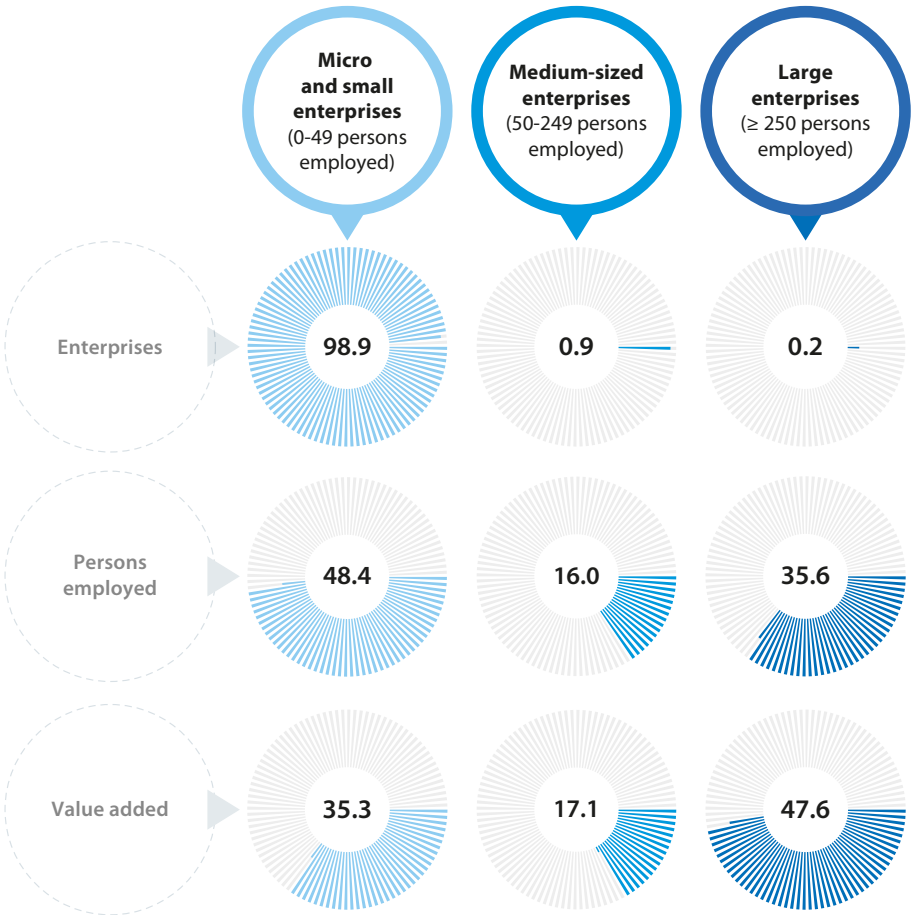
*Source:* Eurostat (online data code: sbs_na_sca_r2)

## Key business statistics in the non-financial business economy

(%, share for each enterprise size class, EU, 2019)

Data relating to enterprises that are active within the non-financial business economy can be presented according to enterprise size and measured in terms of the number of persons they employ. In 2019, the overwhelming majority (98.9 %) of EU businesses were micro or small enterprises employing fewer than 50 persons. Their economic weight was lower in terms of their contribution to employment or value added: micro and small enterprises employed just under half (48.4 %) of the EU's non-financial business economy workforce, while they contributed just over one third (35.3 %) of the value added.

In 2019, there were 43 000 large enterprises (with 250 or more persons employed) in the EU's non-financial business economy. These large enterprises represented just 0.2 % of the total number of enterprises. However, their economic weight was considerably greater: large enterprises employed more than one third (35.6 %) of the EU's non-financial business economy workforce and generated an even higher share of its wealth (47.6 % of value added).

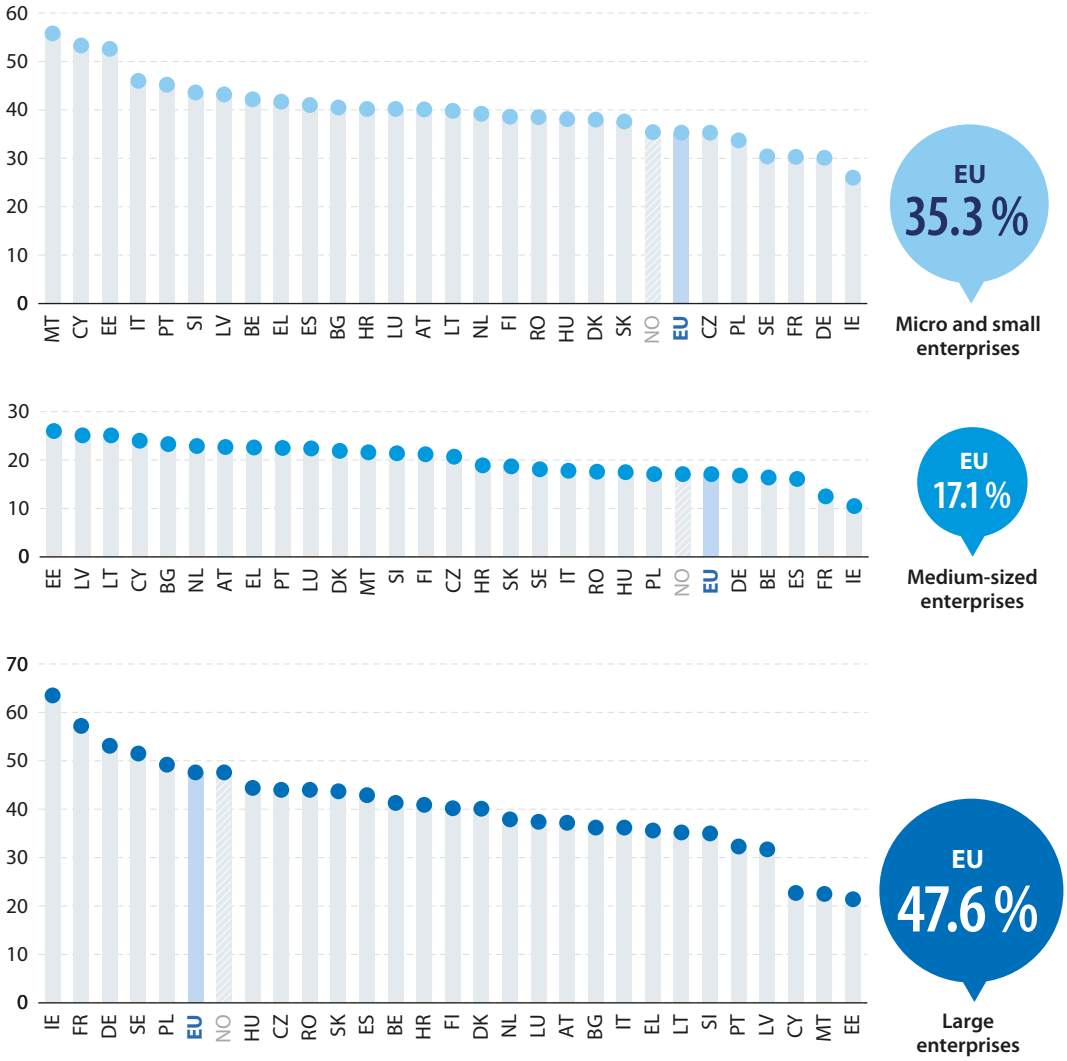



Note: estimates made for the purpose of this publication.

*Source:* Eurostat (online data code: sbs_sc_sca_r2)

## Value added in the non-financial business economy

(%, share of the total value added for each enterprise size class, 2019)




Note: data for the EU are estimates made for the purpose of this publication. PT: excluding real estate activities. CY: excluding mining and quarrying, electricity, gas, steam and air conditioning supply, real estate activities, and repair of computers and personal and household goods. AT: 2016.

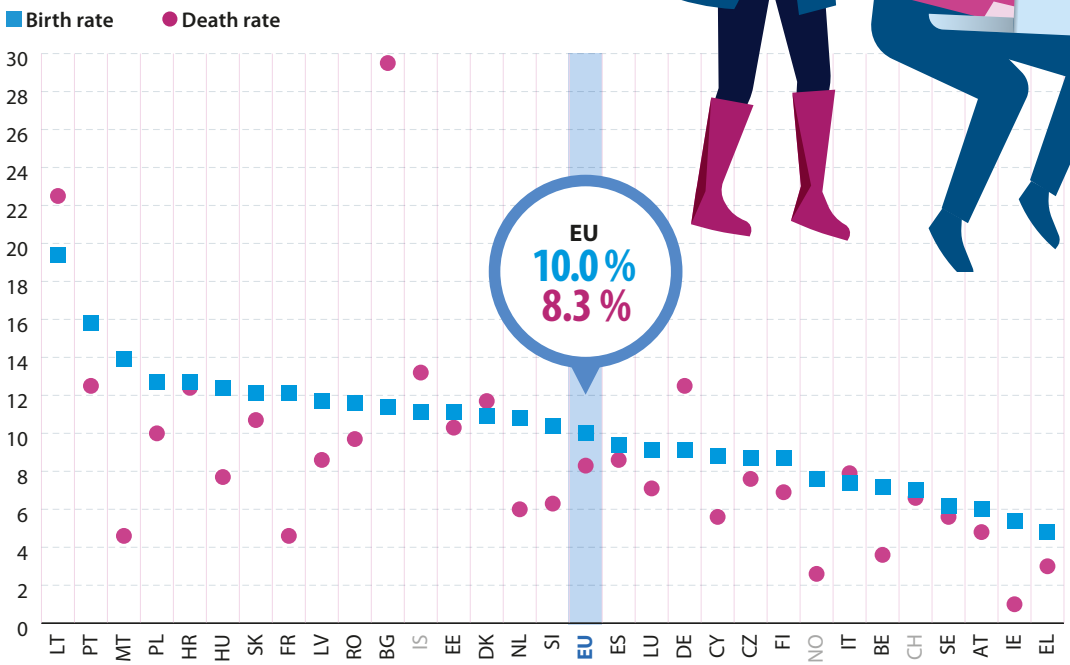
*Source:* Eurostat (online data code: sbs_sc_sca_r2)

In 2019, micro and small enterprises contributed a relatively high share of the value added in the non-financial business economies of most of the southern EU Member States and Estonia. By contrast, large enterprises were responsible for approximately half of value added in the non-financial business economies of Poland and Sweden, 53.1 % in Germany and 57.2 % in France; this share peaked at 63.5 % in Ireland.

# Entrepreneurship

## Enterprise birth and death rates in the business economy

(%, 2019)




Business demography is a term used for studying the characteristics of the population of enterprises. The creation (or birth) of new enterprises and the closure (or death) of enterprises are important indicators for business dynamics.

In 2019, the EU enterprise birth rate (as measured by the number of births as a percentage of the number of active enterprises) in the business economy was 10.0 %. This ratio ranged from highs of 19.4 % in Lithuania and 15.8 % in Portugal down to 4.8 % in Greece.

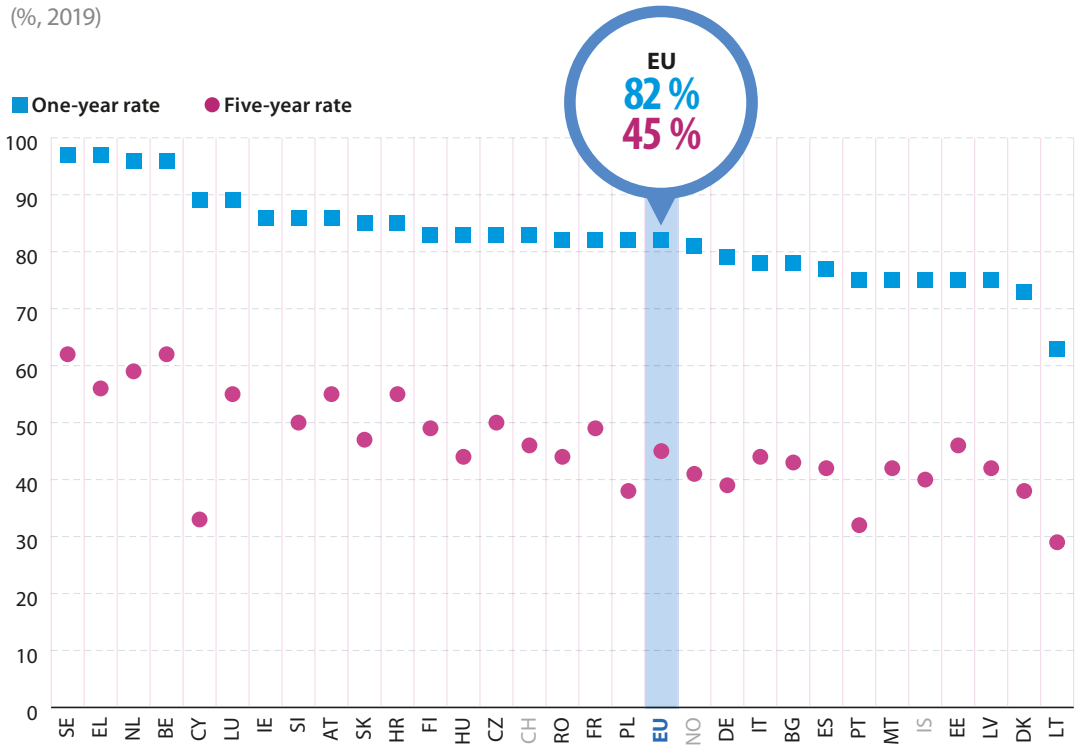
Enterprise deaths concern the permanent closure of an enterprise. The information shown here therefore excludes changes resulting from mergers, take-overs, break-ups or other forms of restructuring such as a change of activity. In 2019, the preliminary enterprise death rate in the EU's business economy was 8.3 %, ranging from highs of 29.5 % in Bulgaria and 22.5 % in Lithuania down to a low of 1.0 % in Ireland (2018 data).

Note: excluding the activities of holding companies (NACE Rev. 2 Group 64.2). IE and CH: 2018.

*Source:* Eurostat (online data codes: bd_9ac_l_form_r2 and bd_9bd_sz_cl_r2)

## Enterprise survival rates in the business economy

(%, 2019)




Note: excluding the activities of holding companies (NACE Rev. 2 Group 64.2). IE: 2018; five-year rate, not available. DE, HR and HU: rates reflect a break in series. BE and PL: five-year rate reflects a break in series.

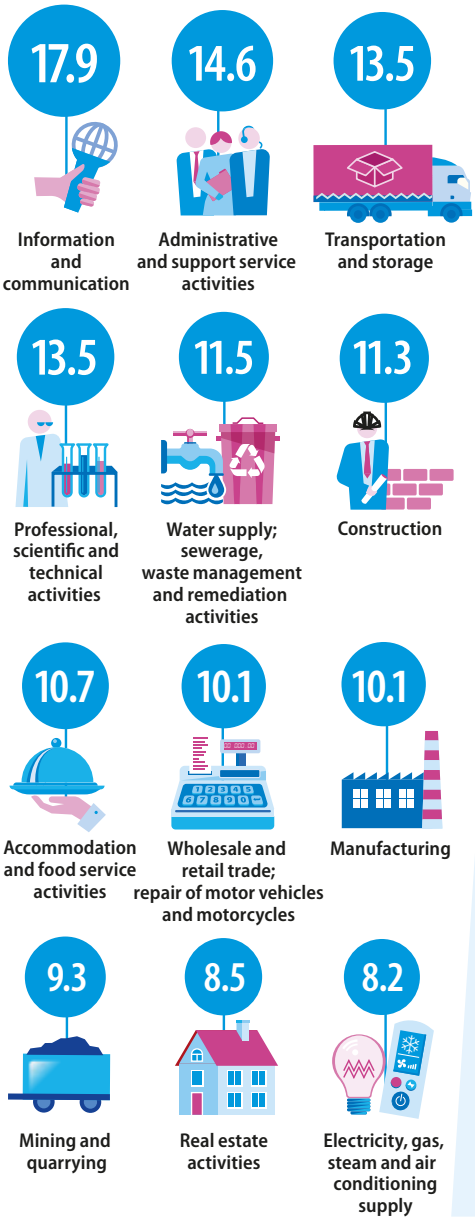
*Source:* Eurostat (online data code: bd_9bd_sz_cl_r2)

While business dynamics are important for the overall performance of an economy, individual entrepreneurs are more likely to be concerned by the development and survival of their business. In 2019, four out of every five enterprises born in the previous year in the EU's business economy had survived their first year: the one-year survival rate was 82 %. This rate was particularly high in Sweden and Greece (97 % of newly-born enterprises survived one year), while 96 % of new enterprises survived at least one year in the Netherlands and Belgium. By contrast, 63 % of new enterprises in Lithuania survived their first year.

The EU five-year survival rate for enterprises born in 2014 and still active in 2019 was 45 %; in other words, less than half of all newly-born enterprises from the 2014 cohort survived until 2019. Five-year enterprise survival rates were less than 50 % for a majority of the EU Member States, with the lowest rate recorded in Lithuania (29 %). The highest rates were in Belgium and Sweden (both 62 %), followed by the Netherlands (59 %).

## High-growth enterprises

(%, share of the total number of enterprises in each activity, EU, 2019)

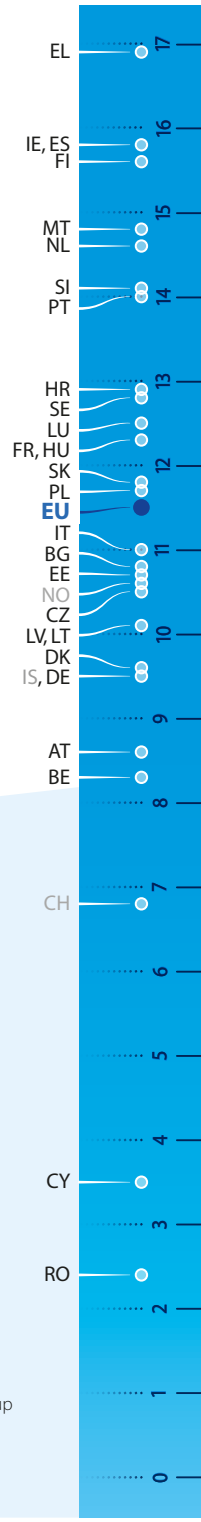




Enterprise creation and subsequent business growth can potentially have a considerable impact on employment.

In 2019, high-growth enterprises accounted for 11.5 % of all enterprises in the EU's business economy. These enterprises were particularly common in the information and communication sector (17.9 %) and in administrative and support service activities (14.6 %). At the other end of the range, three capital-intensive activities – mining and quarrying (9.3 %; 2018 data), real estate activities (8.5 %), and electricity, gas, steam and air conditioning supply (8.2 %) – had the lowest proportions of high-growth enterprises.

Note: a high-growth enterprise is defined within business demography statistics as one that had at least 10 employees at the beginning of the period studied and whose number of employees grew, on average, by more than 10 % per year over a three-year period. Data for the business economy exclude the activities of holding companies (NACE Rev. 2 Group 64.2). Mining and quarrying: 2018.

*Source:* Eurostat (online data code: bd_9pm_r2)




## High-growth enterprises

(%, share of the total number of enterprises in the business economy, 2019)

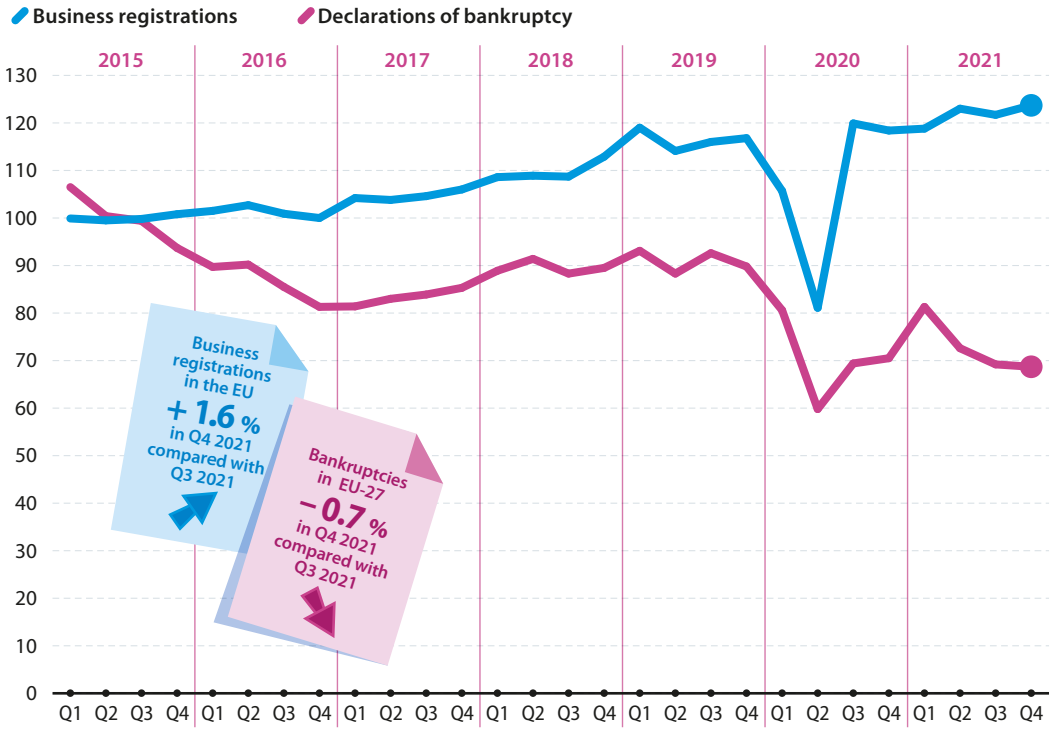
In 2019, high-growth enterprises accounted for around one in six of all enterprises in the business economies of Greece (2018 data), Ireland (2018 data), Spain and Finland. By contrast, there were six EU Member States where high-growth enterprises accounted for less than 1 in 10 enterprises, with particularly low shares in Cyprus (3.5 %) and Romania (2.4 %).

Note: see above for the definition of a high-growth enterprise. Excluding the activities of holding companies (NACE Rev. 2 Group 64.2). IE and EL: 2018. CH: 2017.

*Source:* Eurostat (online data code: bd_9pm_r2)

## Business registrations and declarations of bankruptcy in the business economy

(2015 = 100, EU, Q1 2015–Q4 2021)



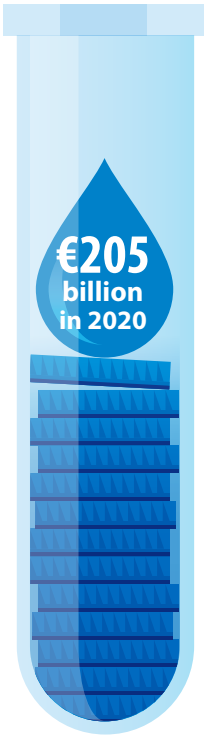

In contrast to data for enterprise births, business registrations are an administrative procedure that may be considered as a declaration of intent. Between the start of 2017 and the end of 2019, there was a relatively stable upward trend for the number of business registrations in the EU. This pattern ended abruptly in the first quarter of 2020 when the impact of the COVID-19 pandemic and related containment measures was felt; an even sharper fall was recorded in the second quarter of 2020. In the third quarter of 2020, the number of business registrations returned above the level recorded at the end of 2019. Thereafter there was a relatively stable development through to the end of 2021.

Bankruptcy declarations provide an early sign for measuring sentiment in the business economy. Some businesses that file for bankruptcy may be sold off and hence they do not necessarily close permanently, in contrast to the situation for an enterprise death. Having fallen between the start of 2015 and the end of 2016, the number of bankruptcy declarations in the EU remained relatively unchanged up until the first quarter of 2020 when the first impact of the pandemic and containment measures was felt. As for business registrations, the number of bankruptcy declarations fell further in the second quarter of 2020. Despite increasing in each of the next three quarters, the number of bankruptcy declarations in the first quarter of 2021 was still clearly below the level at the end of 2019. The number of bankruptcy declarations fell again during the rest of 2021 but remained above the low recorded in the second quarter of 2020.

Note: the business economy covers industry, construction, distributive trades and most other services (as defined by NACE Rev. 2 Sections B to N and P to R and NACE Rev. 2 Divisions 95 and 96). Business registrations excluding CZ, EL, CY, MT, AT, FI and SE. Declarations of bankruptcy excluding CZ, EL, IE, HR, MT, AT, FI and SE.

*Source:* Eurostat (online data code: sts_rb_q)

**For more and updated information on business registrations and declarations of bankruptcy please refer to the Statistics Explained article.**

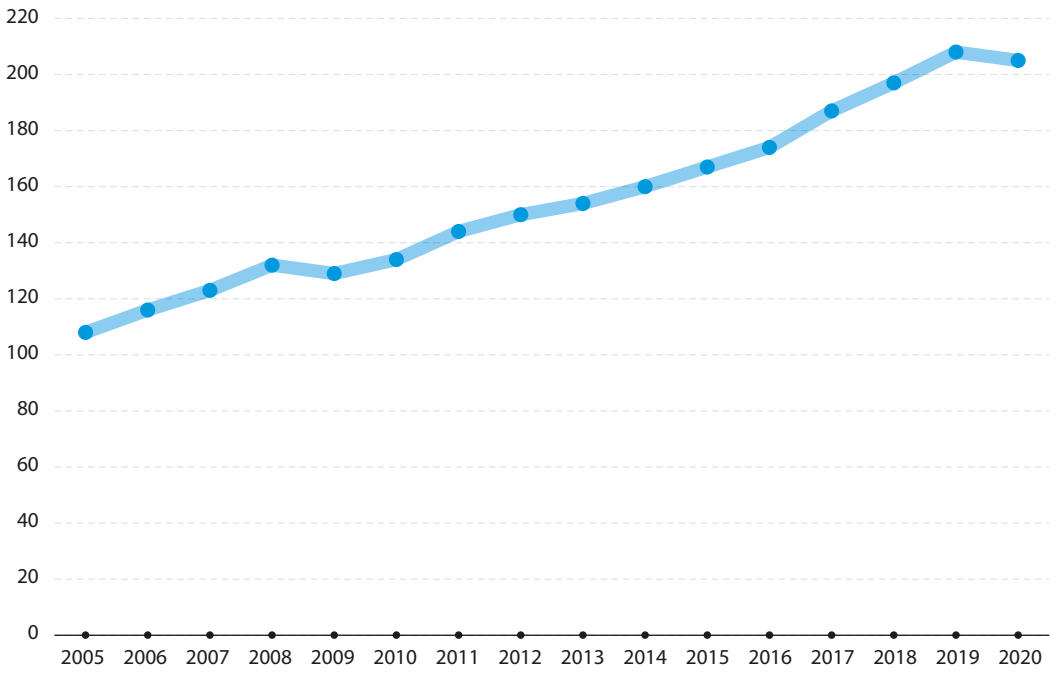



# Research and development

## Business expenditure on R&D

(€ billion, EU, 2005–2020)

Business expenditure on R&D is a measure of intramural R&D. In contrast to global competitors such as Japan or the United States, business expenditure on R&D is relatively low in the EU. That said, the business enterprise sector usually accounts for the highest share of gross domestic expenditure on R&D when compared with the higher education, government and private non-profit sectors. Other than a slight reduction in 2009, EU business expenditure on R&D rose consistently (in current price terms) between 2005 and 2019. This generally upward development was not extended into 2020, as business expenditure on R&D fell 1.5 % to €205 billion.

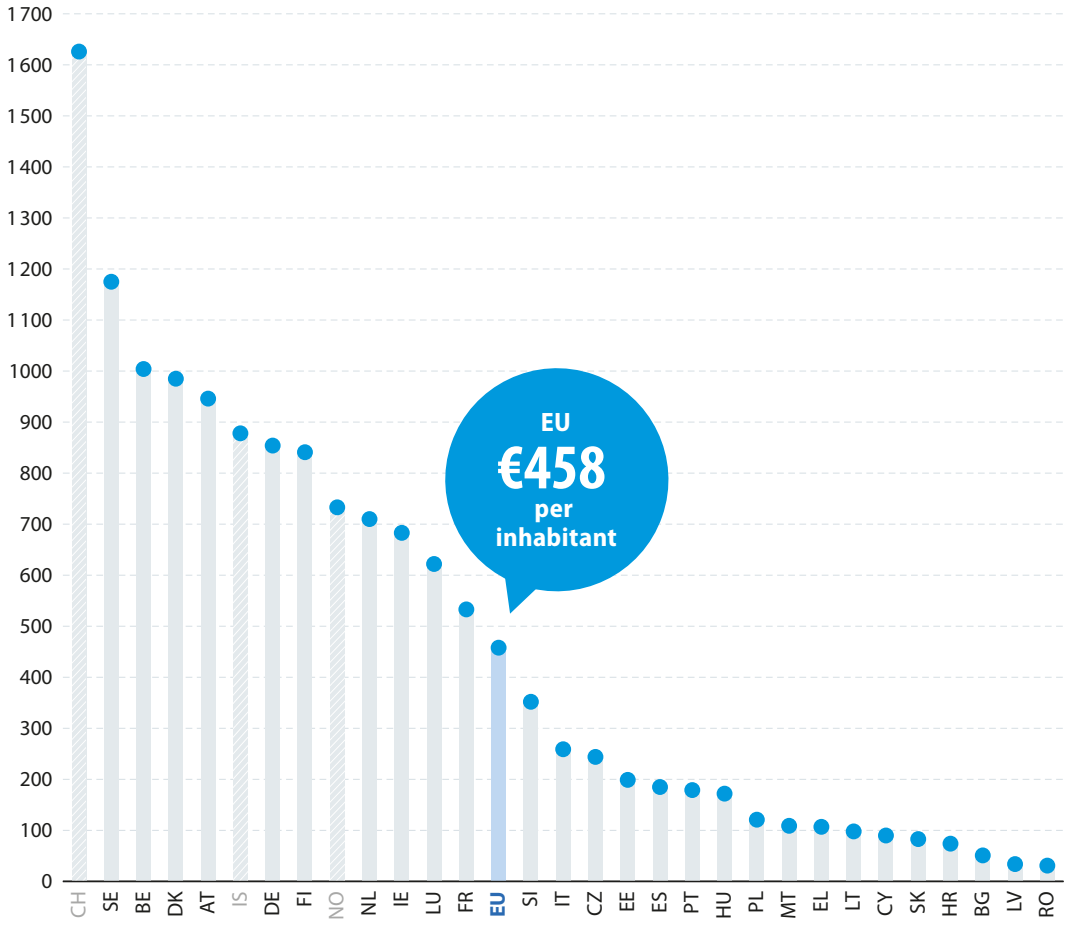



Note: business expenditure across all economic activities.

*Source:* Eurostat (online data code: rd_e_berdindr2)

## Business expenditure on R&D

(€ per inhabitant, 2020)



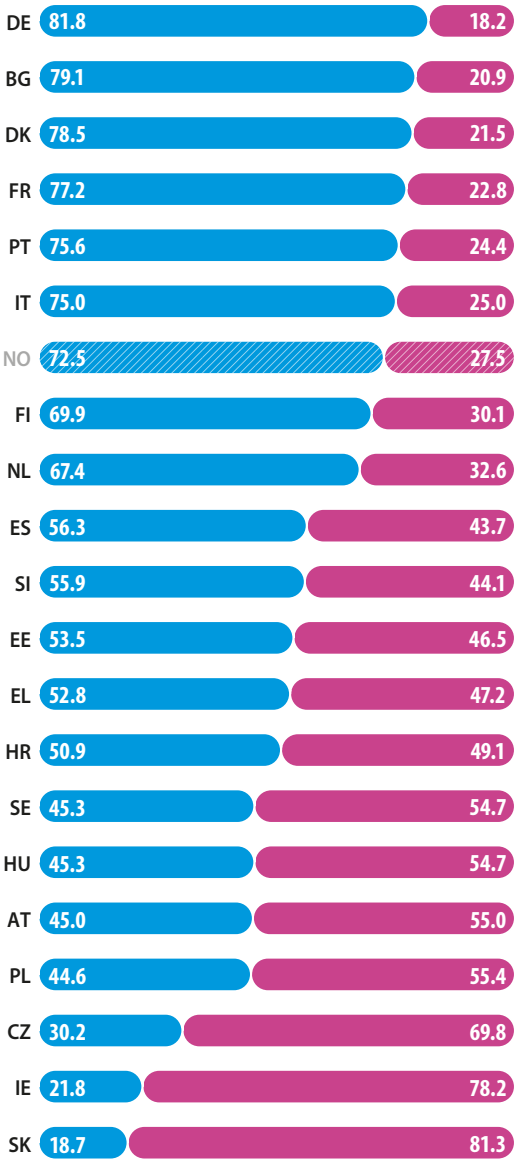

Note: business expenditure across all economic activities. CH: 2019.
*Source:* Eurostat (online data code: rd_e_berdindr2)


Sweden, Belgium, Denmark, Austria, Germany and Finland had the highest rates of business R&D expenditure per inhabitant, alongside the highest overall levels of R&D intensity (R&D expenditure relative to GDP).

Business enterprise expenditure on R&D in the EU averaged €458 per inhabitant in 2020. This ratio stood at more than €1 000 per inhabitant in Sweden and Belgium but was less than €200 per inhabitant in 14 of the EU Member States, the lowest ratios were in Latvia and Romania.

## Intramural R&D expenditure in industry and construction

(%, share of the total intramural expenditure according to the control of the enterprise, 2019)



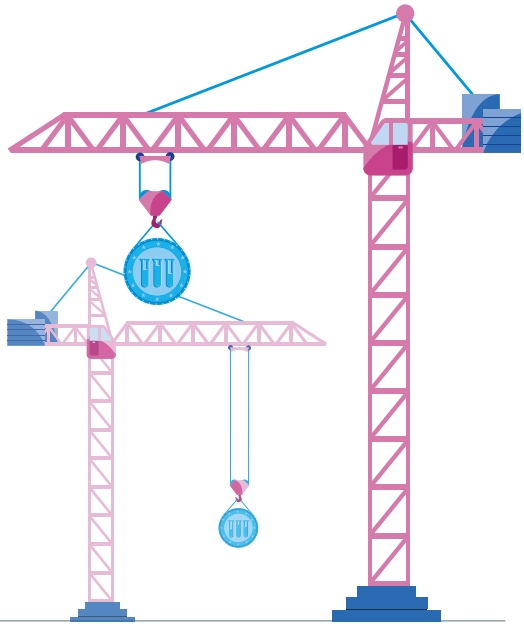

Note: intramural R&D expenditures are all current expenditures plus gross fixed expenditure for R&D performed within a statistical unit. EE, NL and SI: 2017. BE, CY, LV, LT, LU, MT and RO: not available.

*Source:* Eurostat (online data code: fats_g1a_rd)

- **Nationally-owned enterprises**
- **Foreign-owned enterprises**

Part of the globalisation phenomenon observed in recent decades has been the growing internationalisation of R&D expenditure. This can have benefits for host economies as well as for multinational enterprises that perform research abroad, especially in terms of a transfer of knowledge.

Within industry and construction, foreign-owned enterprises performed more than half of all intramural R&D expenditure in 2019 in seven of the EU Member States, namely, Sweden, Hungary, Austria, Poland, Czechia, Ireland and Slovakia. At the other end of the range, almost four fifths of total R&D expenditure in industry and construction was performed by nationally-owned enterprises in Denmark and Bulgaria, with an even higher share in Germany (81.8 %).



# Innovation

## Innovation active enterprises

(EU, 2018)


Note for all indicators on pages 20 and 21: based on core innovation activities; covers enterprises with 10 or more employees; Innovation active enterprises are those having any (ongoing or abandoned) innovation activity (including R&D activities), or that have completed or implemented any innovation.

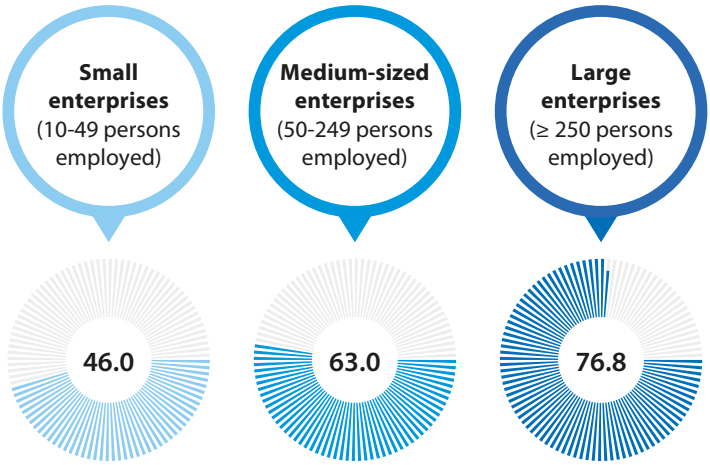
*Source:* Eurostat (online data code: inn_cis11_bas)

The Community innovation survey (CIS) focuses on the innovation activities of enterprises. It concentrates on a set of core innovation activities and only covers enterprises with 10 or more persons employed. In 2018, there were 729 000 enterprises across the EU in this target population, of which approximately half (367 000) were innovation active.

## Innovation active enterprises

(%, share of enterprises that are innovation active for each enterprise size class, EU, 2018)

In 2018, across core innovation activities more than three quarters of all large enterprises (with 250 or more persons employed) in the EU engaged in some form of innovative activity. By contrast, less than half of all small enterprises (with 10–49 persons employed) were engaged in some form of innovation.

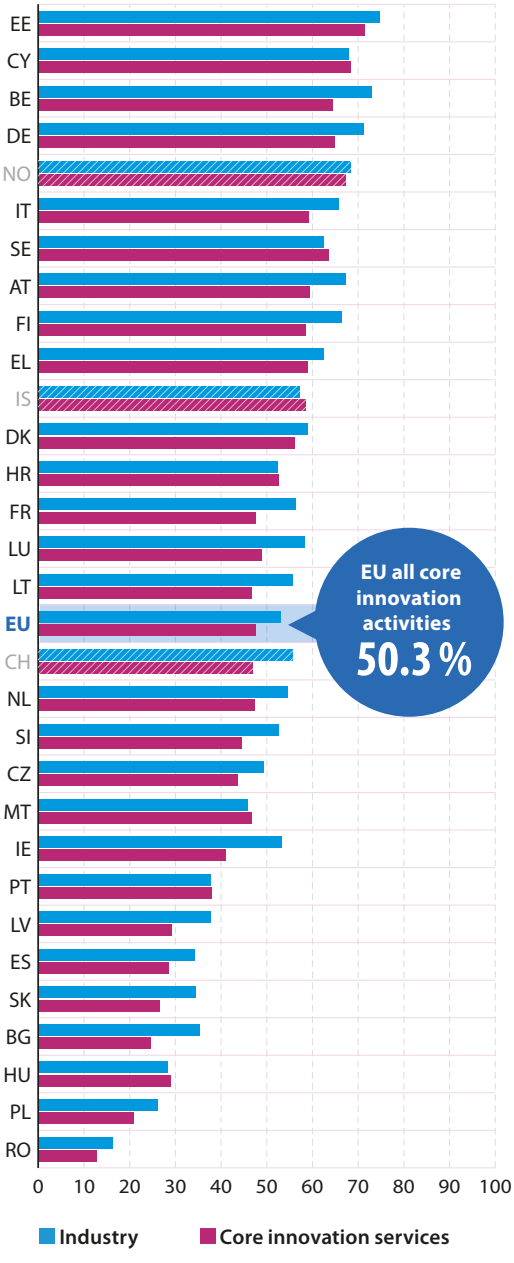



Note: see the note for the chart at the top of this page.

*Source:* Eurostat (online data code: inn_cis11_bas)

## Innovation active enterprises

(%, share of enterprises that are innovation active for each activity, 2018)




Note: see the note at the top of page 20. Ranked on the share for industry and core innovation services together. Industry is defined by NACE Rev. 2 Sections B to E. Core innovation services is defined by NACE Rev. 2 Sections H, J and K and Divisions 46 and 71 to 73.

*Source:* Eurostat (online data code: inn_cis11_inact)

Across the EU, in 2018 there appeared to be little difference between the share of enterprises within industry (53.1 %) and core innovation services (47.6 %) that were engaged in innovation.

In 2018, the proportion of industrial enterprises that were innovators peaked at 74.7 % in Estonia, while Belgium, Germany, Cyprus and Austria were the only other EU Member States to record shares of more than two thirds. By contrast, the lowest shares were recorded in Poland (26.1 %) and Romania (16.3 %).

In 2018, the proportion of core innovation service enterprises that were innovators peaked at 71.5 % in Estonia. The next highest shares – all within the range of 64–68 % – were recorded in Cyprus, Germany, Belgium and Sweden.

## Persons employed working in innovation active enterprises

(%, share of all persons employed, 2018)

The proportion of persons employed working in innovative enterprises reflects, at least to some degree, the specialisation and concentration of particular economic activities and the size structure of enterprises within each economy: larger enterprises tend to have a greater propensity to be innovators.

Across core innovation activities in 2018, more than 80.0 % of persons employed in Germany, Estonia, Belgium, Finland, Austria and Sweden worked for an enterprise engaged in some form of innovation activity. In all but one of the remaining EU Member States, more than half of all persons employed worked for an innovative enterprise. The exception was Romania, where approximately one quarter of all persons employed were in innovative enterprises.

Note: see the note at the top of page 20.

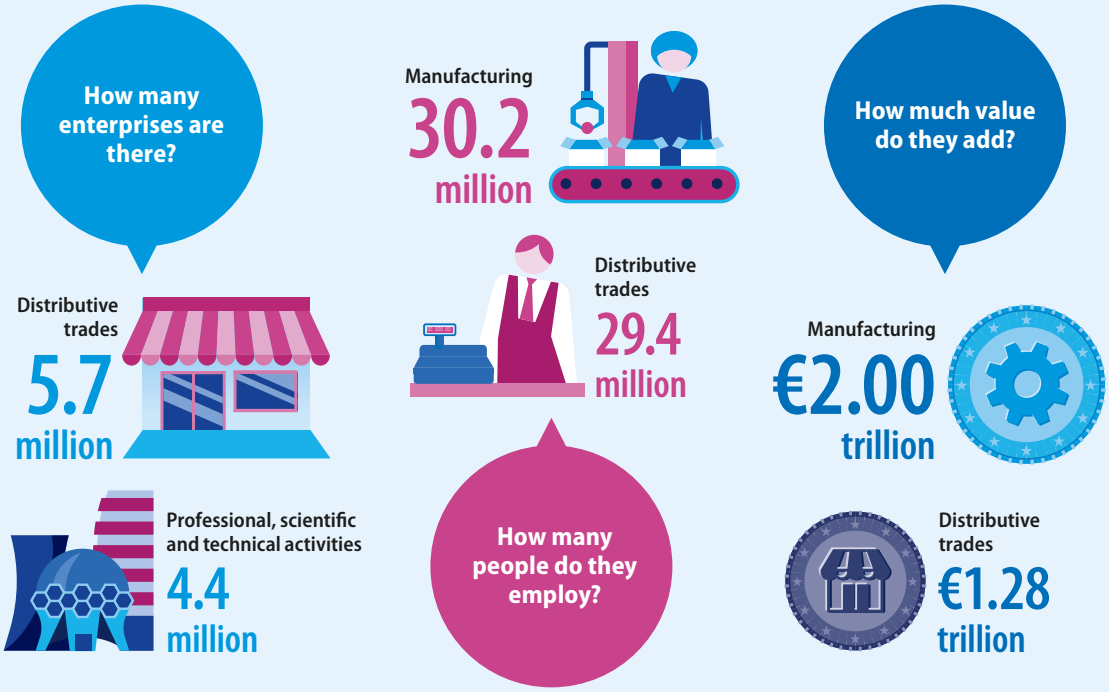
*Source:* Eurostat (online data code: inn_cis11_bas)

# 2 Sectoral overview

**This chapter presents an overview of the structure and performance of the EU's non-financial business economy. The subsequent chapters provide more detailed presentations.**

## Largest and second largest activities within the non-financial business economy

(EU, 2019)



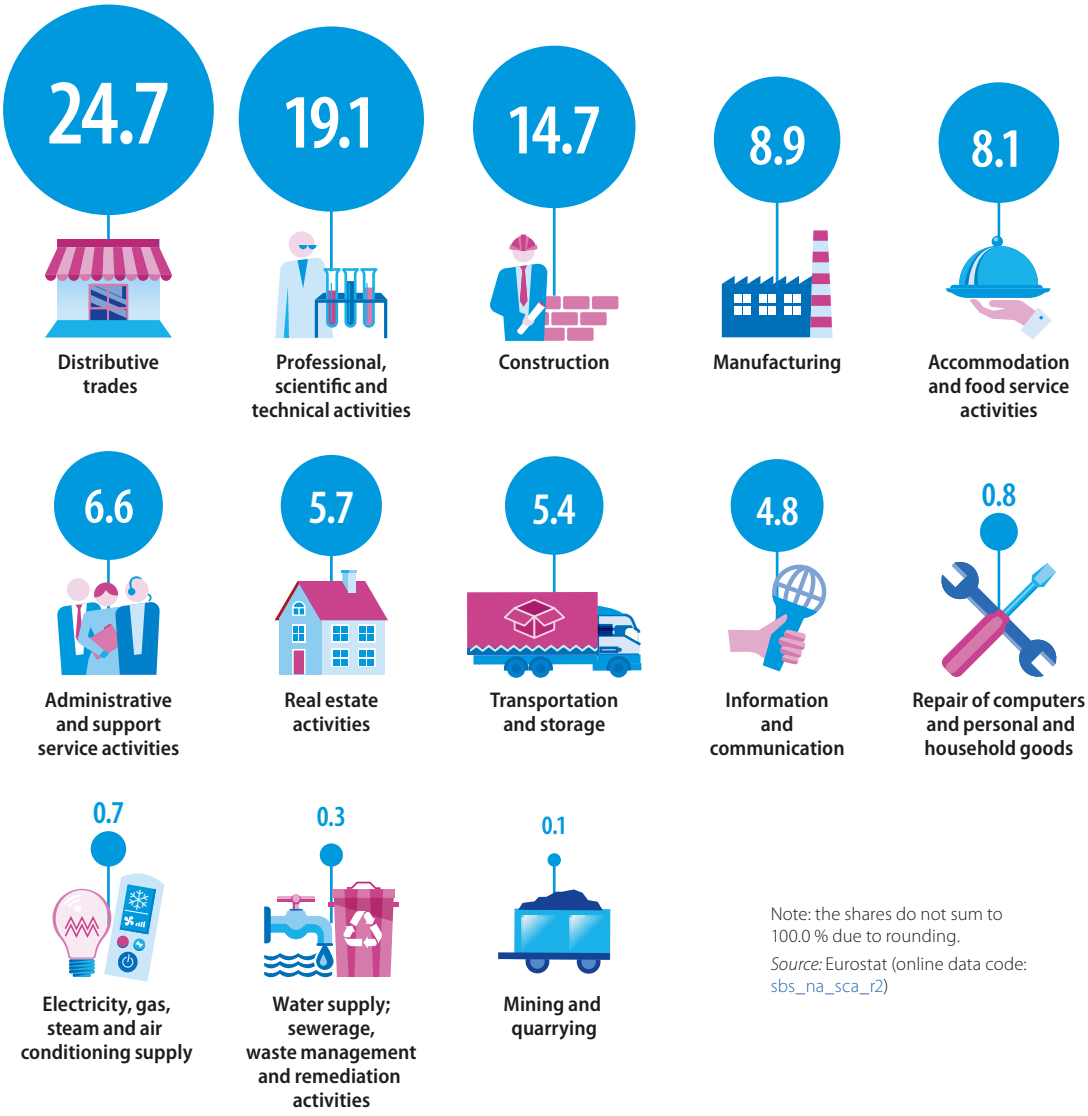

In 2019, the highest number of enterprises was recorded within the activity of distributive trades (5.7 million): approximately one in four enterprises within the EU's non-financial business economy had a distributive trade as their principal activity. Distributive trades employed 29.4 million persons and added €1.28 trillion of value; these were the second highest values behind manufacturing, which had 30.2 million persons employed and €2.00 trillion of value added.

Note: the largest and second largest activities are based on NACE Rev. 2 sections.

*Source:* Eurostat (online data code: sbs_na_sca_r2)

## Distribution of enterprises within the non-financial business economy

(%, share of the total number of enterprises, EU, 2019)




Note: the shares do not sum to 100.0 % due to rounding.

*Source:* Eurostat (online data code: sbs_na_sca_r2)

There were considerably more enterprises active within distributive trades (24.7 % of the total) than for any other sector of the EU's non-financial business economy in 2019. Indeed, there were only two other sectors that recorded double-digit shares: professional, scientific and technical activities (a 19.1 % share of the total number of enterprises) and construction (14.7 %).

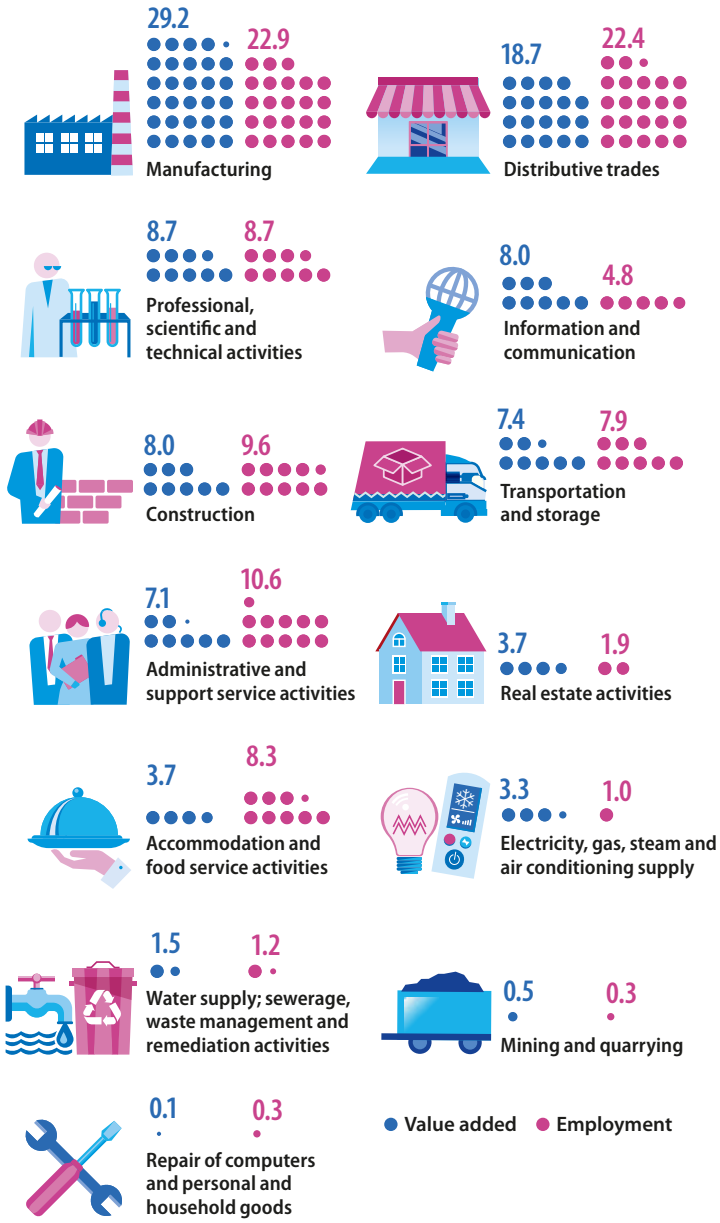
At the other end of the range, there were four activities which each contributed less than 1.0 % of the total number of enterprises in the EU's non-financial business economy in 2019: the repair of computers and personal and household goods (0.8 %); electricity, gas, steam and air conditioning supply (0.7 %); water supply; sewerage, waste management and remediation activities (0.3 %); and mining and quarrying (0.1 %).

## Value added and employment within the non-financial business economy

(%, share of total value added and the total number of persons employed, EU, 2019)

In 2019, some 29.2 % (or €2.0 trillion) of the added value in the EU's non-financial business economy was contributed by the manufacturing sector. This was considerably greater than the second highest share, recorded for distributive trades (18.7 %), which in turn was much greater than the share registered for professional, scientific and technical activities (8.7 %).

More than one fifth of the EU's non-financial business economy workforce in 2019 was employed in each of manufacturing (22.9 %) and distributive trades (22.4 %). Administrative and support service activities – which are relatively labour-intensive – employed just over one tenth (10.6 %) of the non-financial business economy workforce; this was the only other sector to record a double-digit share.

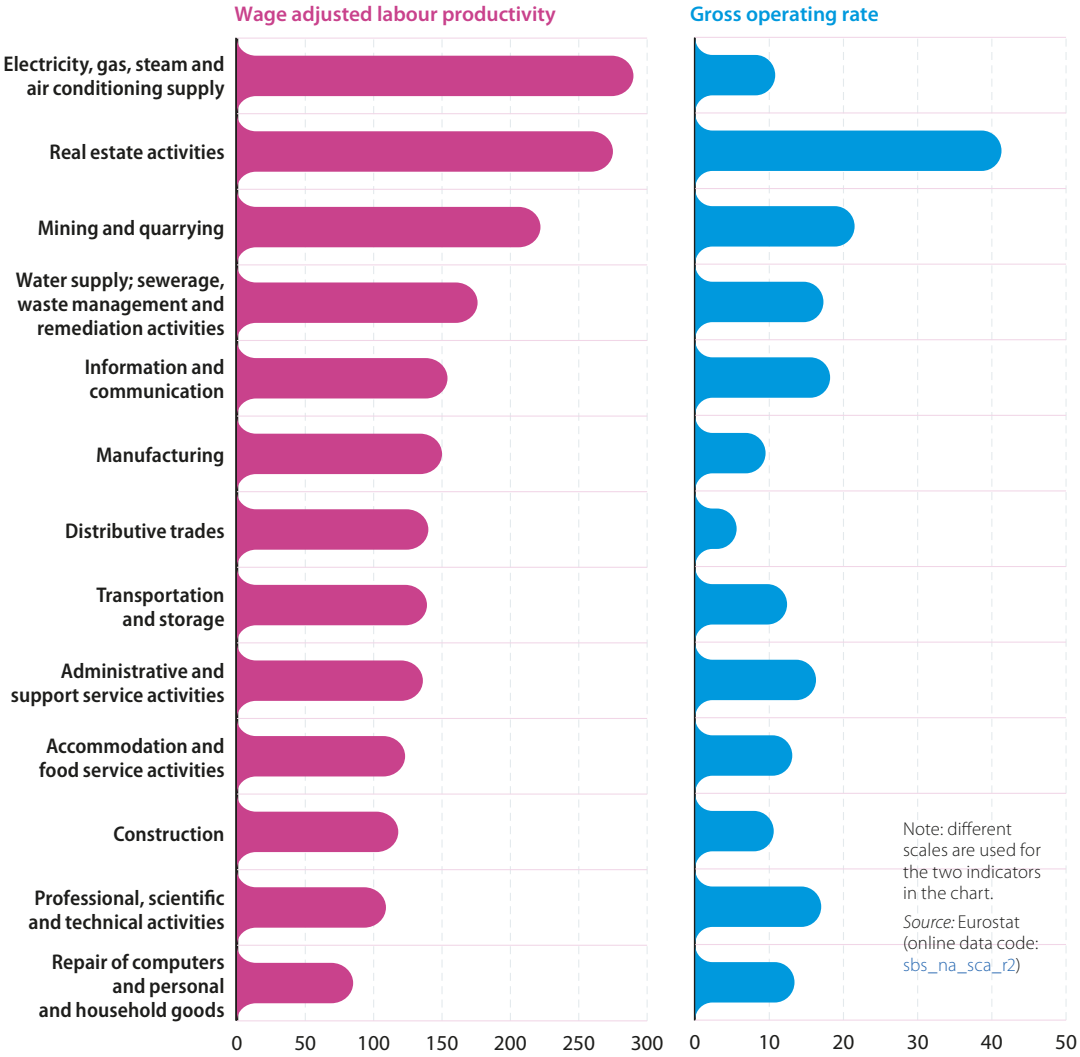



Note: the shares do not sum to 100.0 % due to rounding.

*Source:* Eurostat (online data code: sbs_na_sca_r2)

## Performance and productivity within the non-financial business economy

(%, EU, 2019)



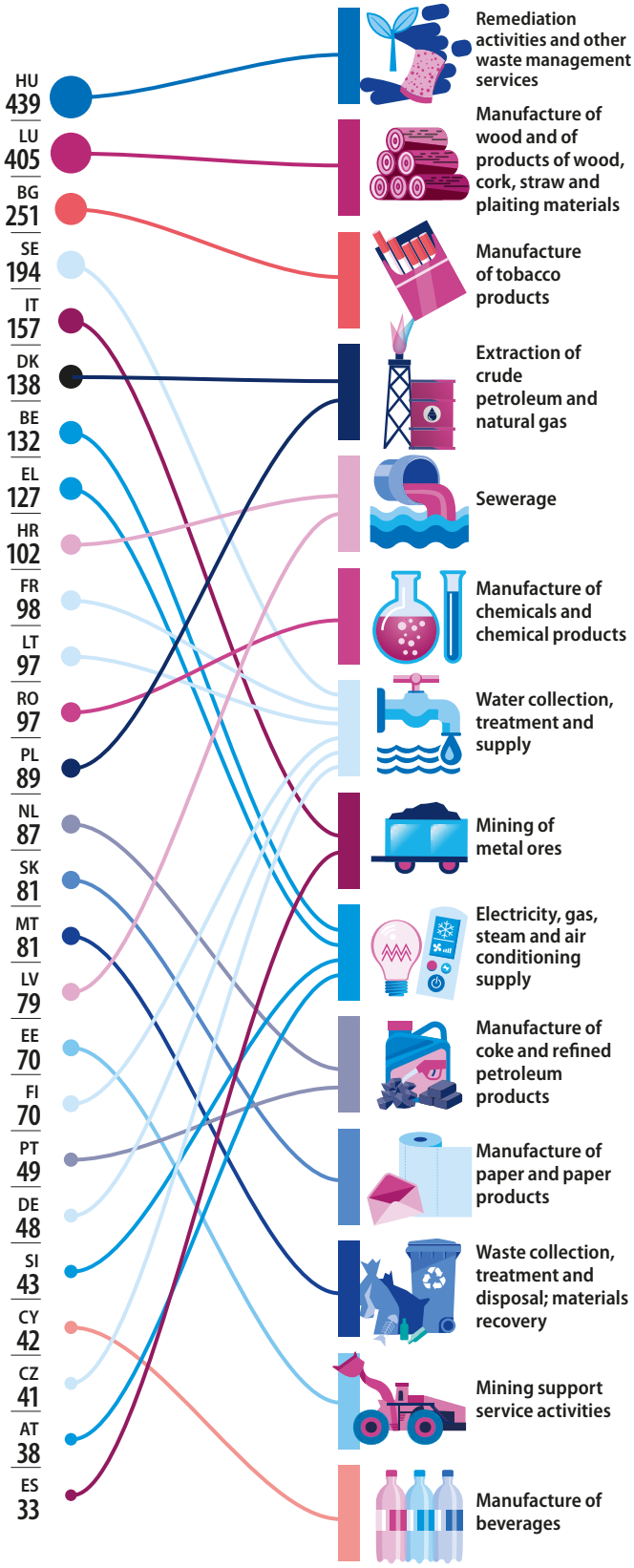

The wage-adjusted labour productivity ratio is defined as value added divided by personnel costs (subsequently adjusted by the share of paid employees in the total number of persons employed). The highest wage-adjusted labour productivity ratio in the EU's non-financial business economy in 2019 was recorded for the capital-intensive activity of electricity, gas, steam and air conditioning supply: value added per person employed in this activity was 2.9 times as high as average personnel costs per employee. At the other end of the range, the repair of computers and personal and household goods was the only activity in the EU where value added per person employed did not cover average personnel costs per employee in 2019.

The gross operating rate is a measure of profitability and is defined as value added at factor cost minus personnel costs (the gross operating surplus) divided by total turnover. In 2019, the highest gross operating rate across the EU's non-financial business economy was recorded for real estate activities (41.3 %) and the lowest for distributive trades (5.6 %).

## Industrial activities in which EU Member States recorded their highest investment rates

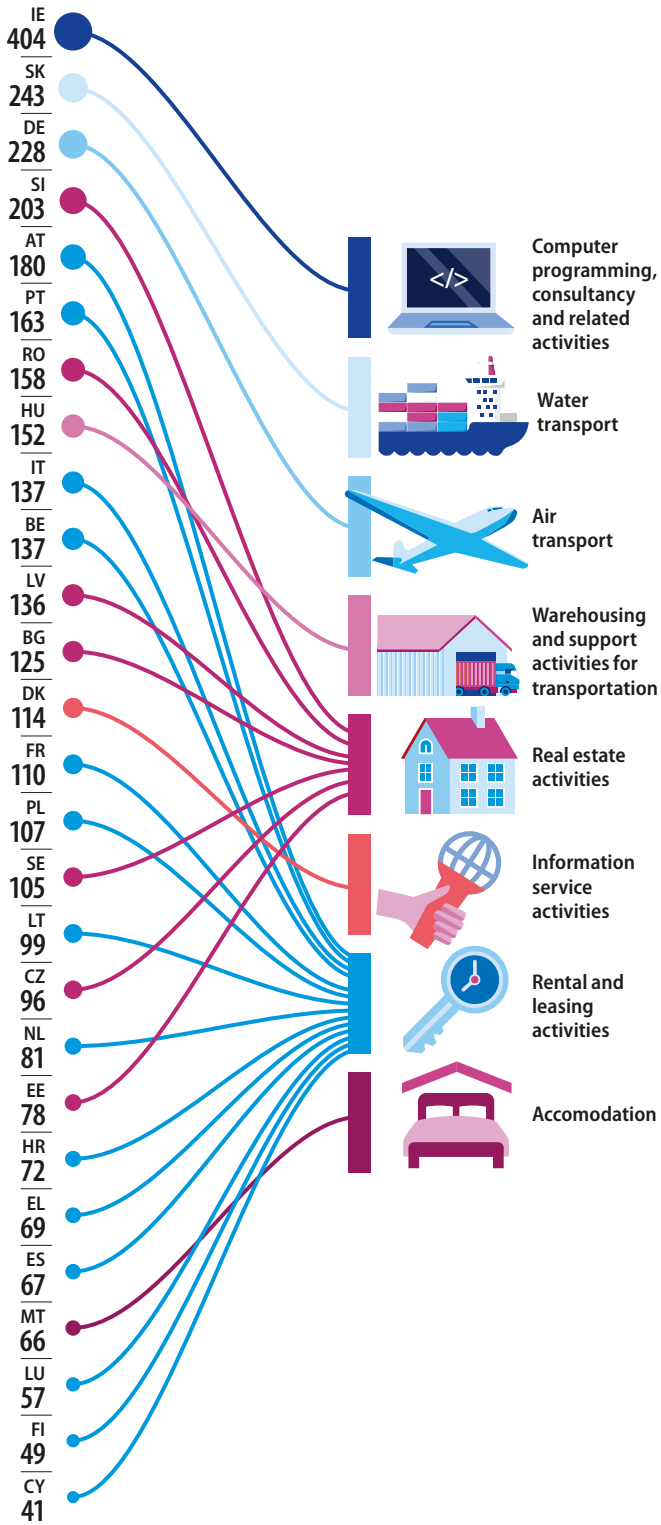
(%, 2019)

The investment rate is defined as gross investment in tangible goods divided by value added at factor cost. Some of the highest investment rates in 2019 were recorded for capital-intensive activities. This was particularly the case for: water collection, treatment and supply; the extraction of crude petroleum and natural gas; and sewerage. Across the EU Member States, the highest investment rate among industrial activities in 2019 was recorded in Hungary for remediation activities and other waste management services (439 %), followed by Luxembourg for the manufacture of wood and of products of wood, cork, straw and plaiting materials (405 %).




Note: the highest investment rates for industrial activities are based on NACE Rev. 2 divisions. For nearly all EU Member States, some NACE Rev. 2 divisions are confidential. IE: not available.

*Source:* Eurostat (online data code: sbs_na_sca_r2)




## Non-financial service activities in which EU Member States recorded their highest investment rates

(%, 2019)

Among the divisions that compose non-financial services, just over half of the EU Member States recorded their highest investment rate in 2019 for rental and leasing activities. However, the highest investment rates among non-financial services were recorded in Ireland for computer programming, consultancy and related activities (404 %), in Slovakia for water transport (243 %) and in Germany for air transport (228 %).

Note: the highest investment rates for non-financial service activities are based on NACE Rev. 2 divisions. For nearly all EU Member States, some NACE Rev. 2 divisions are confidential.

*Source:* Eurostat (online data code: sbs_na_sca_r2)

# 3 Industry

# Structure

**The EU's industrial economy is covered by four activities: mining and quarrying; manufacturing; electricity, gas, steam and air conditioning supply; and water supply, sewerage, waste management and remediation activities. Manufacturing was by far the largest of these four activities: in 2019, it accounted for more than four fifths (84.7 %) of industrial value added in the EU and for an even higher share of industrial employment (90.3 %).**

## Concentration of industrial activity – top five EU Member States

(%, share of EU employment and value added for each activity, 2019)

**EU industrial activities in 2019**

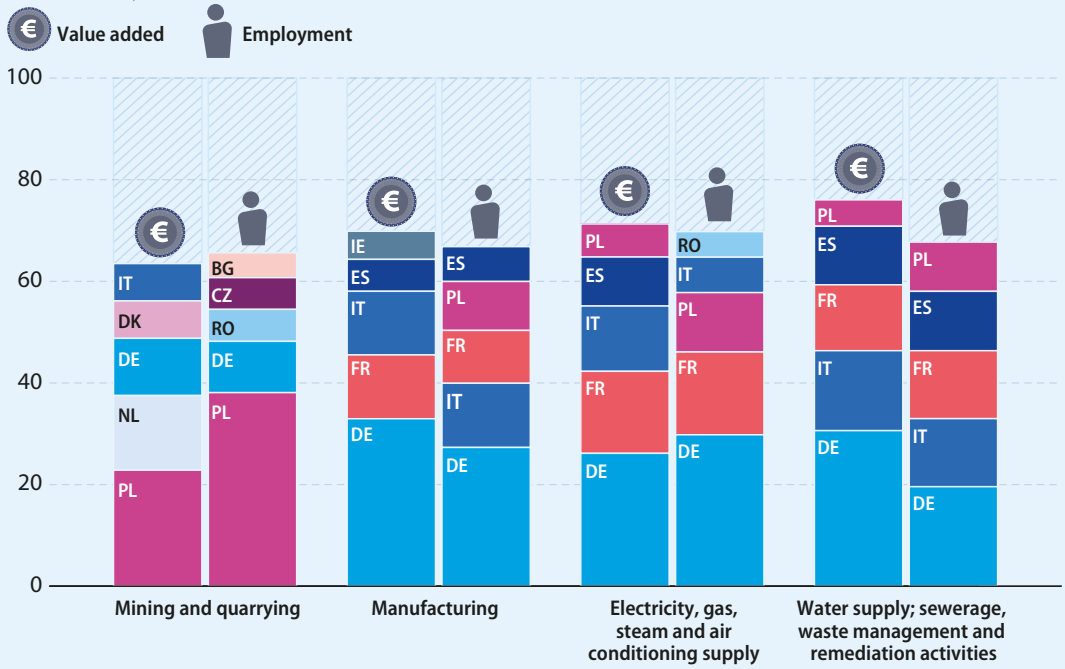
**2.3 million** enterprises

**33.4 million** persons employed

**€2.3 trillion** of value added

In 2019, Germany had the highest share of EU value added for the manufacturing sector (33.0 %), for water supply, sewerage, waste management and remediation activities (30.6 %) and for electricity, gas, steam and air conditioning supply (26.2 %). By contrast, Poland contributed the largest share of value added to the EU's mining and quarrying sector (22.8 %), followed by the Netherlands (14.7 %).

Germany also recorded the highest shares of EU employment for the same three industrial activities as noted above, with shares of 27.3 %, 19.6 % and 29.8 % respectively. Poland had the largest employment share within the EU's mining and quarrying sector, at 38.1 %.




Note: electricity, gas, steam and air conditioning supply, MT: not available.

*Source:* Eurostat (online data code: sbs_na_ind_r2)

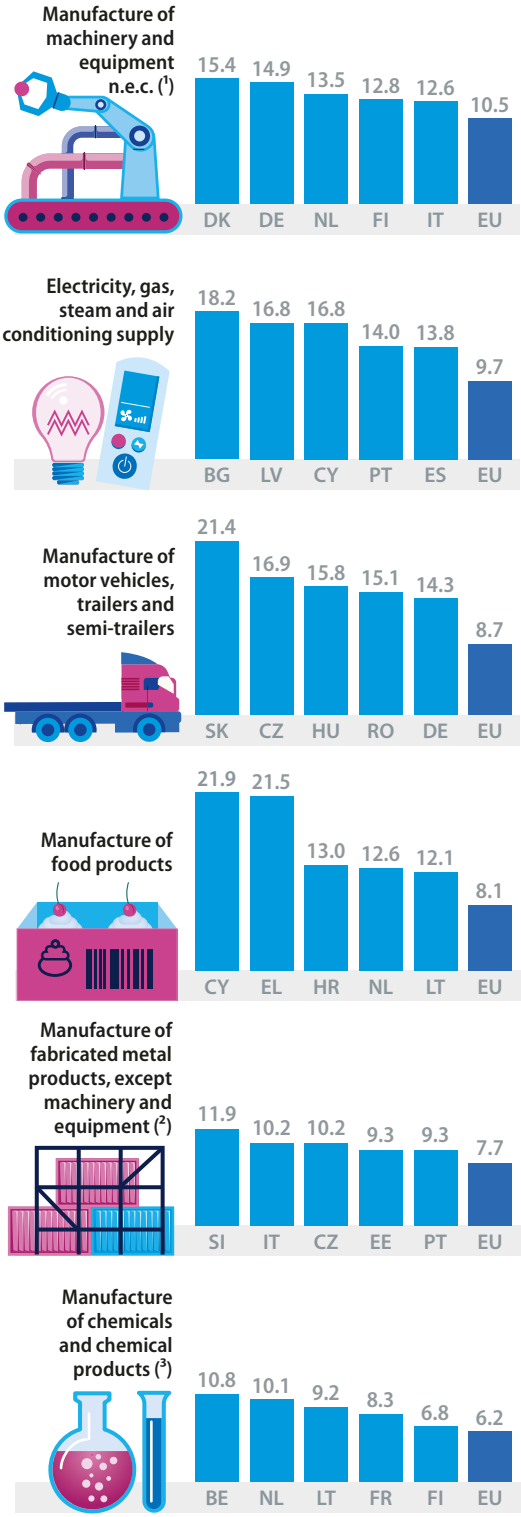
## Value added specialisation – top five EU Member States

(%, share of industrial value added, 2019)

In 2019, measured by value added the six largest activities (based on NACE Rev 2 divisions) within the EU's industrial economy were: the manufacture of machinery and equipment not elsewhere classified (10.5 % of industrial value added); electricity, gas, steam and air conditioning supply (9.7 %); the manufacture of motor vehicles, trailers and semi-trailers (8.7 %); the manufacture of food products (8.1 %); the manufacture of fabricated metal products, except machinery and equipment (7.7 %); and the manufacture of chemicals and chemical products (6.2 %).

Among the EU Member States, Denmark had the highest share of its industrial value added within the manufacture of machinery and equipment (15.4 %), followed by Germany with a 14.9 % share. For electricity, gas, steam and air conditioning, Bulgaria (18.2 %) had the highest proportion, while for the manufacture of motor vehicles, trailers and semi-trailers, the highest share was recorded in Slovakia (21.4 %).

In Cyprus, the manufacture of food products accounted for 21.9 % of industrial value added in 2019, just ahead of the 21.5 % share observed in Greece. In Slovenia, the manufacture of fabricated metal products except machinery and equipment accounted for 11.9 % of industrial value added. Belgium had the highest degree of relative specialisation across the EU Member States for the manufacture of chemicals and chemical products, with 10.8 % of its industrial value added being generated in this subsector, ahead of the Netherlands where a 10.1 % share was observed.

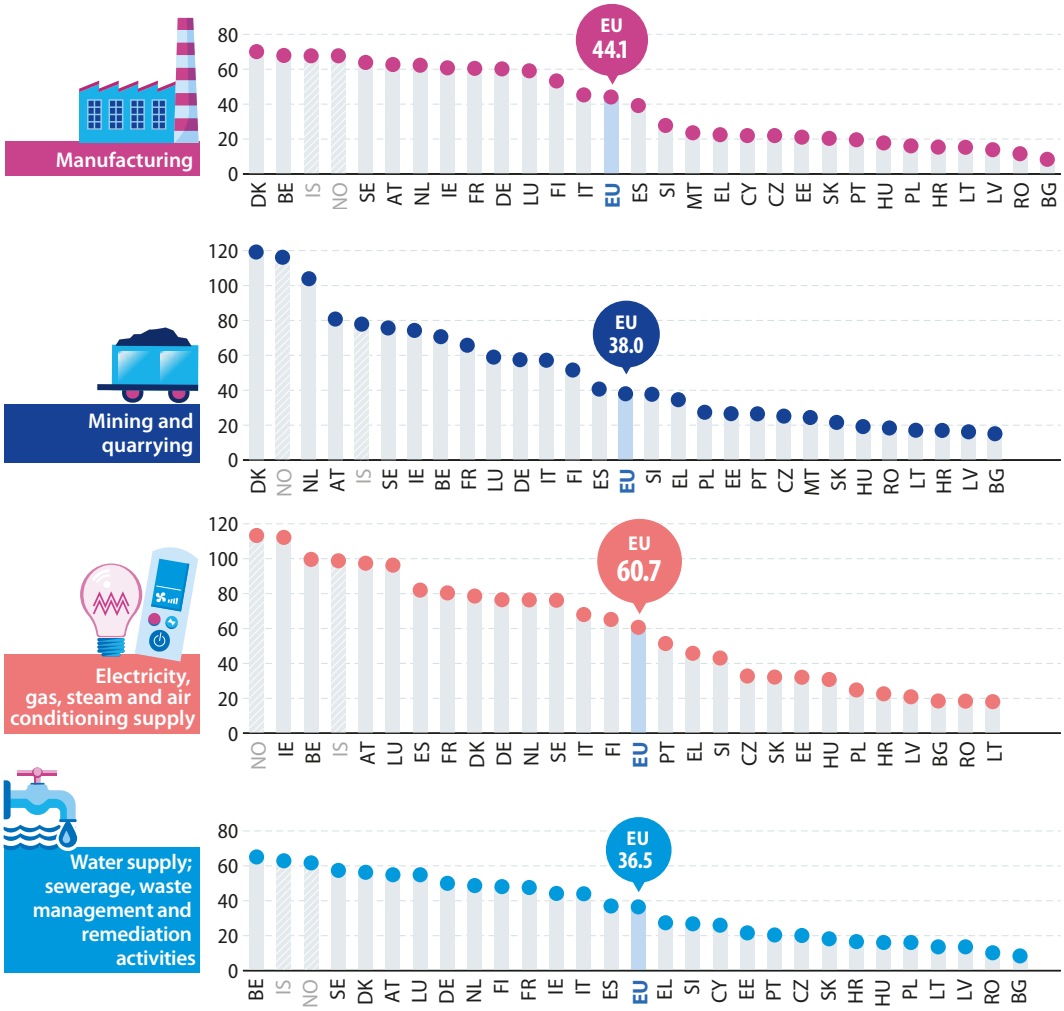



Note: data are shown for the six largest activities based on EU value added for NACE Rev. 2 industrial divisions. MT: not available.
(1) EU: excluding IE. IE: not available. (2) EU: excluding PL. PL: not available. (3) IE and PL: not available.

*Source:* Eurostat (online data code: sbs_na_ind_r2)

## Average personnel costs within industrial sections

(€ thousand per employee, 2019)




Note: IS, 2018. Mining and quarrying: CY: not available. Electricity, gas, steam and air conditioning supply: CY and MT: not available. Water supply; sewerage, waste management and remediation activities: MT: not available.

*Source:* Eurostat (online data code: sbs_na_ind_r2)

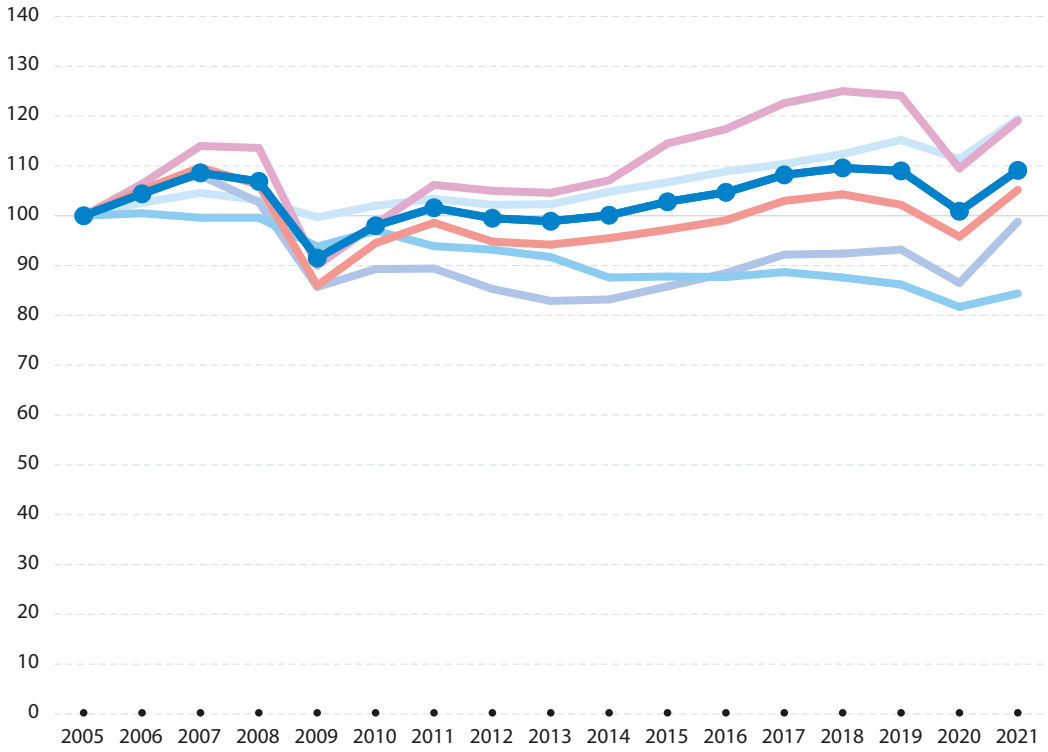
In 2019, average personnel costs across the four sections within the EU's industrial economy ranged from a high of €60 700 per employee for electricity, gas, steam and air conditioning supply down to €36 500 per employee for water supply, sewerage, waste management and remediation activities.

In the vast majority of EU Member States, the highest average personnel costs across industrial activities were registered for electricity, gas, steam and air conditioning supply. The only exceptions in 2019 were Denmark, the Netherlands and Poland (incomplete data for Cyprus and Malta): in all three cases, average personnel costs were higher for mining and quarrying. By contrast, the lowest average personnel costs were often recorded for water supply, sewerage, waste management and remediation activities; Estonia, Greece, Croatia and Portugal were exceptions, as average personnel costs were lower in manufacturing.

# Developments

## Industrial production index

(2005 = 100, EU, 2005–2021)




**Industry – total**

Non-durable consumer goods

Capital goods

Intermediate goods

Durable consumer goods

Energy

Note: industry covers NACE Rev. 2 Sections B to D.

*Source:* Eurostat (online data code: sts_inpr_a)

The industrial production index is an important indicator to monitor the business cycle; it is a volume index that reflects real changes (after removing the impact of price changes) in industrial output.

Industrial output in the EU contracted in 2008 and 2009 as a result of the recession associated with the global financial and economic crisis. Output declined 1.6 % in 2008 (compared with a year before) and was down as much as 14.4 % in 2009; after two years of recovery, there were also decreases in 2012 and 2013 before industrial output in the EU resumed its upward trajectory. Having grown for five consecutive years, there was a 0.5 % decline for the EU's industrial production index in 2019, followed by a considerable contraction in 2020 (down 7.4 %); this most recent decline was driven by falling output for all types of manufacturing, most notably for capital goods (down 11.8 % in 2020), reflecting the impact of the COVID-19 pandemic. Industrial output rebounded in 2021, recording growth of 8.1 %, bringing the index level back to approximately the same level it had been in 2019.

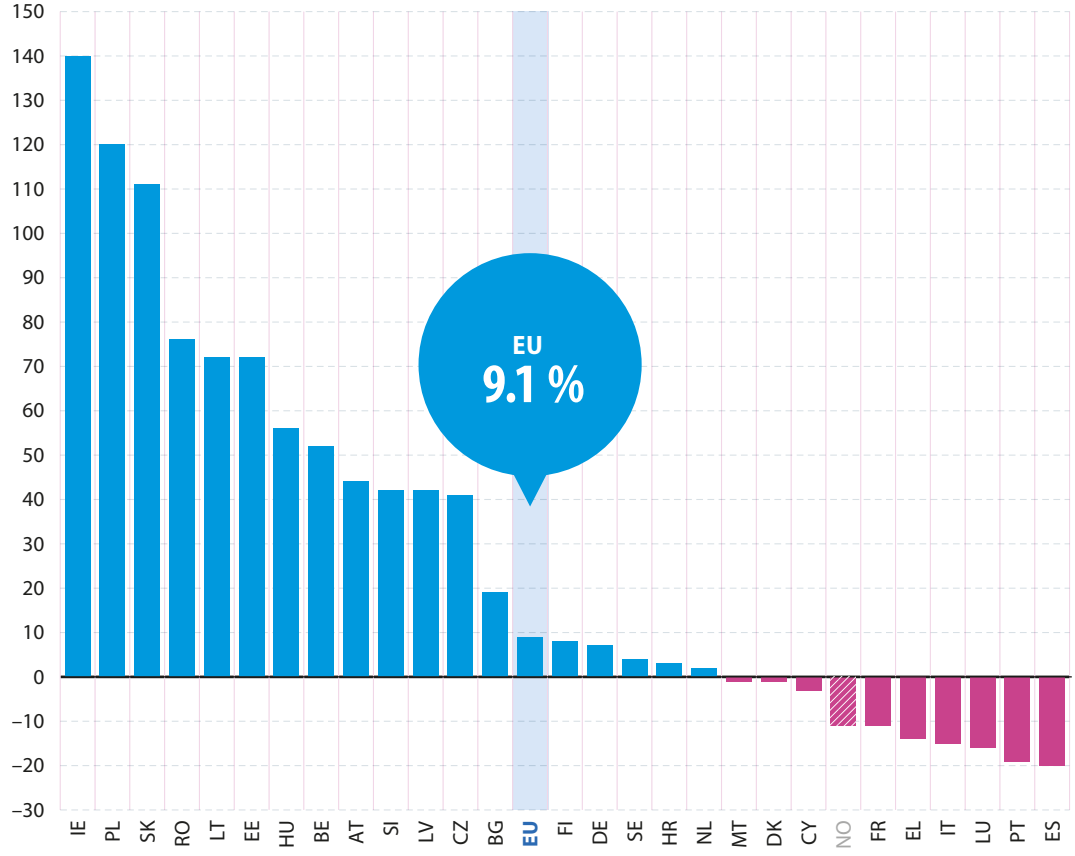
**When considering the information shown in the figures on pages 36 and 37 it should be remembered that the period covered (2005–2021) includes the global financial and economic crisis and subsequent recovery. Furthermore, by ending in 2021, the overall rates of change reflect the combination of the long-term developments and the often substantial (downward) impact of the COVID-19 pandemic in 2020 and rebound in 2021.**

## Overall change in the industrial production index

(%, 2005–2021)

EU industrial production was 9.1 % higher in 2021 than it had been in 2005. The highest growth rates among the EU Member States during this period were recorded in Ireland, Poland and Slovakia, all of which had a level of industrial output in 2021 that was more than double its 2005 level.

A total of nine EU Member States recorded lower levels of industrial production in 2021 than in 2005. The largest contractions during this period were in Spain (–19.6 %), Portugal (–18.9 %), Luxembourg (–16.5 %), Italy (–14.7 %), Greece (–13.8 %) and France (–11.1 %).

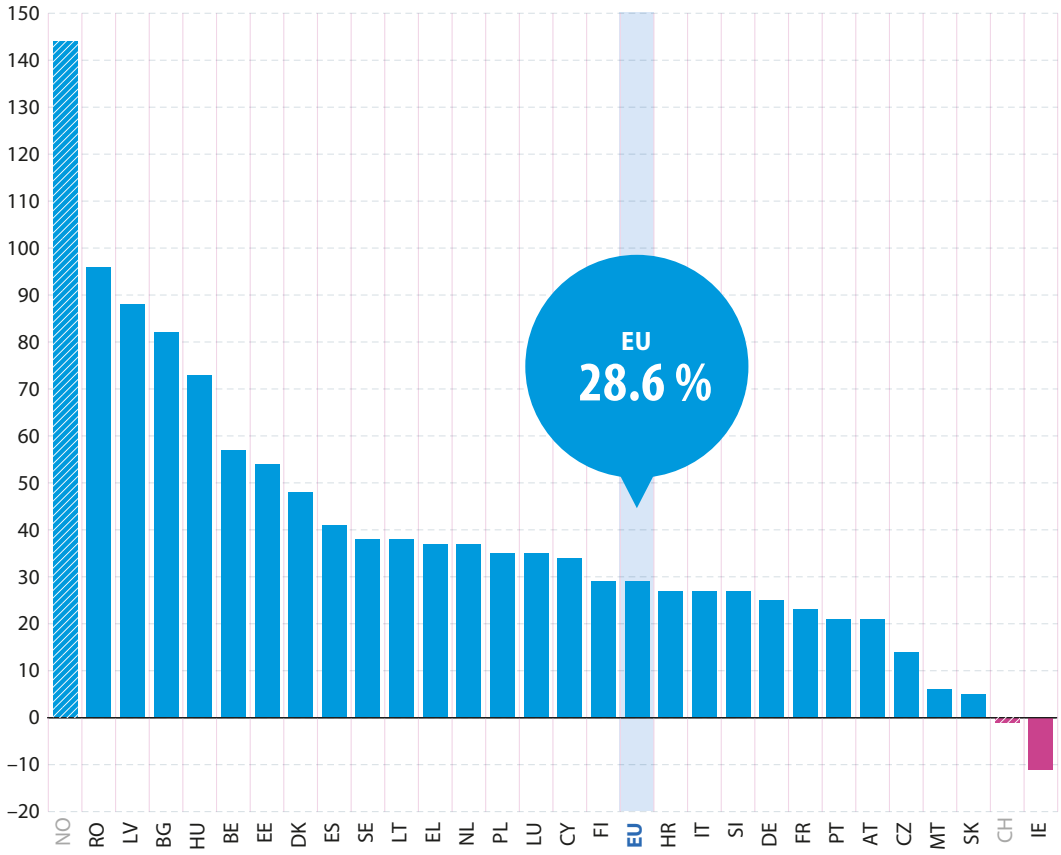



Note: industry covers NACE Rev. 2 Sections B to D.

*Source:* Eurostat (online data code: sts_inpr_a)

## Overall change in industrial producer prices

(%, 2005–2021)




The industrial producer price index is based on selling prices reported by a sample of producers across the EU. This indicator is used to monitor price developments at various stages of industrial processes; changes in producer prices can be an early indicator of inflationary pressures within an economy.

Industrial producer prices in the EU rose at a relatively subdued pace between 2005 and 2021. The overall change in prices during this period was an increase of 28.6 %. Industrial producer prices increased in all but one of the EU Member States. The highest increases were recorded in Romania (up 96.3 % overall), Latvia (87.6 %) and Bulgaria (81.9 %). The only exception was Ireland, where prices fell 10.9 %.

Note: industry covers NACE Rev. 2 Sections B to D and Division 36.

*Source:* Eurostat (online data code: sts_inpp_a)

# Focus on high-tech industry

## High-tech manufacturing activities

(%, share of manufacturing value added, 2019)

High-tech industries cover the manufacture of selected products: pharmaceuticals; computer, electronic and optical products; air and spacecraft and related machinery. In 2019, these activities provided work to 2.0 million people in the EU (6.8 % of manufacturing employment), while they added €293 billion of value (14.6 % of manufacturing value added).

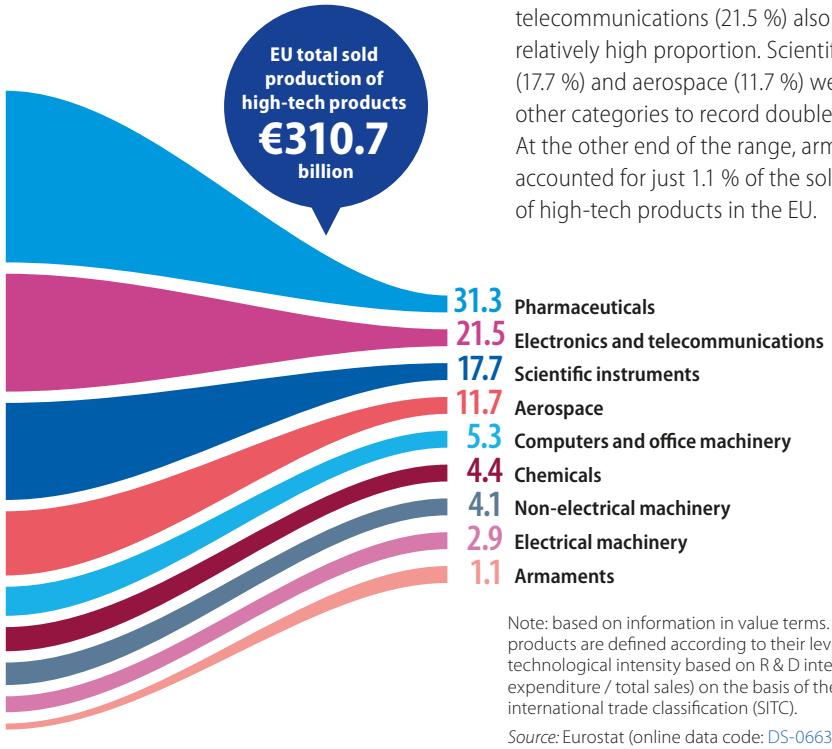
In 2019, high-tech industries accounted for 24.5 % of manufacturing value added in Belgium, while the next largest share was recorded in France (18.0 %). In a majority of the EU Member States less than 10.0 % of added value in manufacturing was derived from high-tech industries. The lowest share was recorded in Portugal (4.7 %).


Note: DK, IE, CY, LU and SK, not available. EE, IS and CH: 2018. NL: 2017.

*Source:* Eurostat (online data code: sbs_na_sca_r2)

## Sold production of high-tech products

(%, share of all high-tech products, EU, 2020)



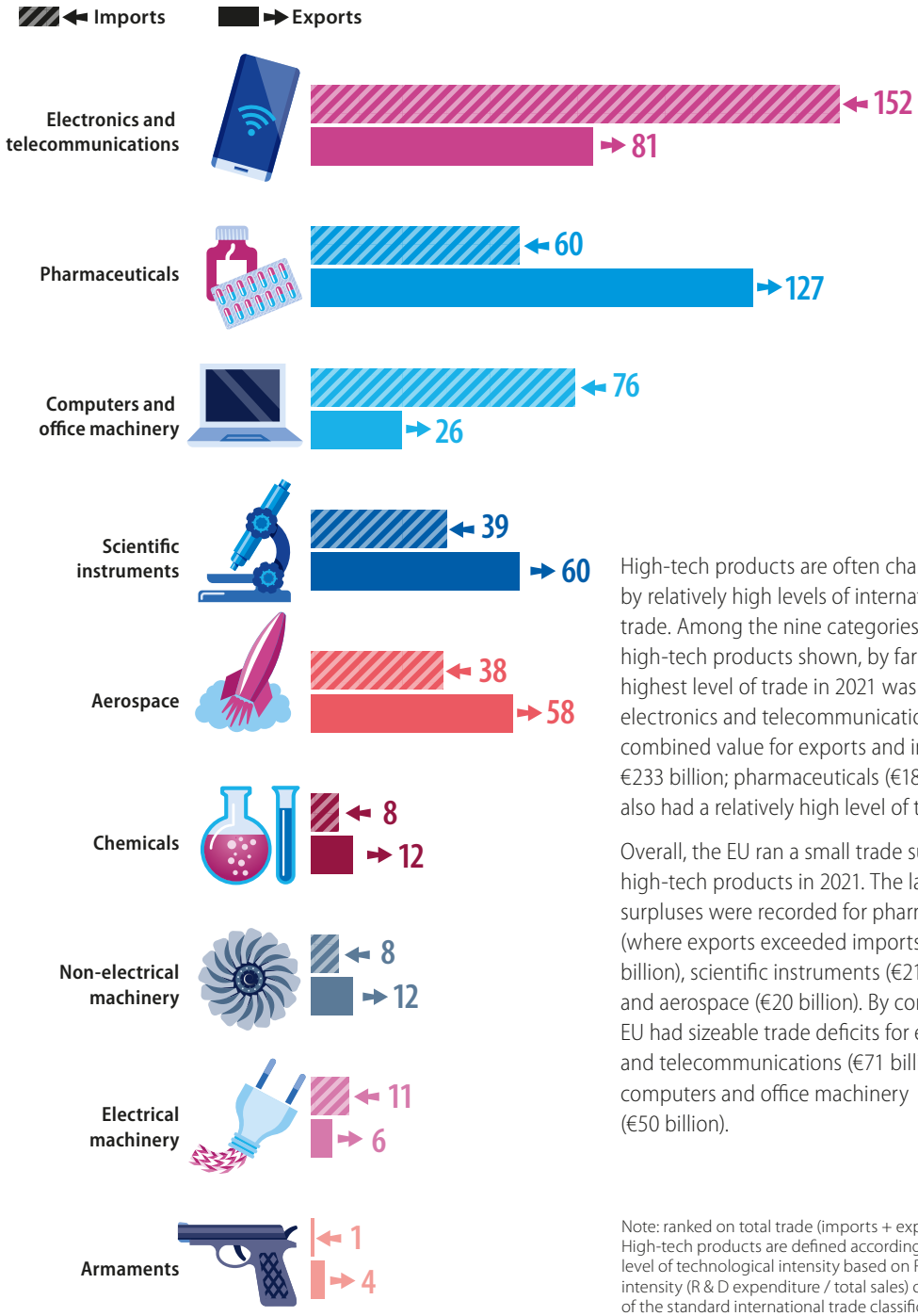

In 2020, 31.3 % of the EU's sold production of high-tech products was made-up of pharmaceuticals, while electronics and telecommunications (21.5 %) also contributed a relatively high proportion. Scientific instruments (17.7 %) and aerospace (11.7 %) were the only other categories to record double-digit shares. At the other end of the range, armaments accounted for just 1.1 % of the sold production of high-tech products in the EU.

Note: based on information in value terms. High-tech products are defined according to their level of technological intensity based on R & D intensity (R & D expenditure / total sales) on the basis of the standard international trade classification (SITC).

*Source:* Eurostat (online data code: DS-066341)

## Trade in high-tech products

(€ billion, EU, 2021)




High-tech products are often characterised by relatively high levels of international trade. Among the nine categories of high-tech products shown, by far the highest level of trade in 2021 was for electronics and telecommunications, with a combined value for exports and imports of €233 billion; pharmaceuticals (€187 billion) also had a relatively high level of total trade.

Overall, the EU ran a small trade surplus for high-tech products in 2021. The largest surpluses were recorded for pharmaceuticals (where exports exceeded imports by €67 billion), scientific instruments (€21 billion) and aerospace (€20 billion). By contrast, the EU had sizeable trade deficits for electronics and telecommunications (€71 billion) and for computers and office machinery (€50 billion).

Note: ranked on total trade (imports + exports). High-tech products are defined according to their level of technological intensity based on R & D intensity (R & D expenditure / total sales) on the basis of the standard international trade classification (SITC).

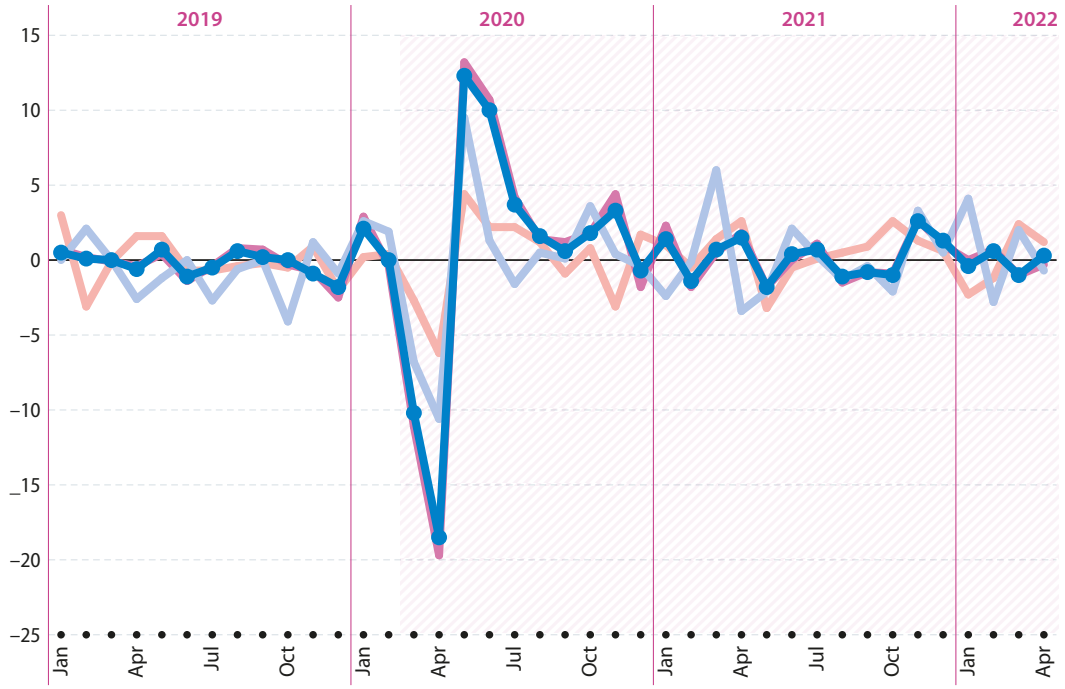
*Source:* Eurostat (online data code: DS-018995)

# Latest developments

**Monthly data for 2020 and to a lesser extent 2021 show the impact of the COVID-19 pandemic on the industrial economy. The most recent data for 2022 may be impacted by a wider range of issues, for example aftereffects of the COVID-19 crisis on supply chains and early impacts from the Russian military aggression against Ukraine and the related sanctions.**

## Industrial production indices

(%, change compared with the previous month, EU, January 2019–April 2022)




**Industry – total**

Mining and quarrying

Manufacturing

Electricity, gas, steam and air conditioning hsupply

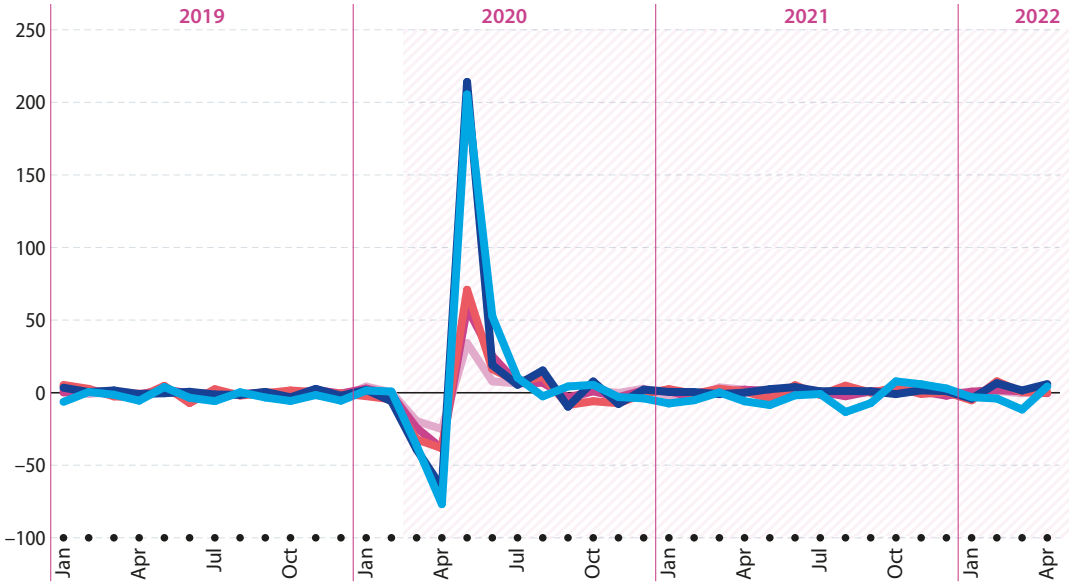
Note: the industry total covers mining and quarrying (NACE Rev. 2 Section B), manufacturing (Section C), and electricity, gas, steam and air conditioning supply (Section D).

*Source:* Eurostat (online data code: sts_inpr_m)

The largest month-on-month decreases in EU industrial output during the first wave of the pandemic were registered in March 2020 (down 10.2 %) and April 2020 (down 18.5 %). These decreases were followed by a rebound in activity, with output increasing in May, June and July 2020, up 12.3 %, 10.0 % and 3.7 % respectively. Since then, monthly rates of change have ranged from –1.8 % to 3.3 %.

## Industrial production indices for the five manufacturing divisions most impacted during the COVID-19 pandemic

(%, change compared with the previous month, EU, January 2019–April 2022)




- **Motor vehicles, trailers and semi-trailers**
- **Leather and related products**
- **Wearing apparel**
- **Furniture**
- **Textiles**

Note: the five manufacturing divisions most impacted by the COVID-19 pandemic were selected on the basis of the change in EU production indices between February and April 2020.

*Source:* Eurostat (online data code: sts_inpr_m)

Across the EU, the industrial activities that suffered the largest impacts during the first wave of the COVID-19 pandemic in March and April 2020 included the manufacture of: motor vehicles, trailers and semi-trailers; leather; wearing apparel; furniture; and textiles. However, output for these activities rebounded strongly in May and June 2020.

For the manufacture of furniture, textiles and leather, more recent information shows a relatively stable development for output since autumn or early winter 2020.

By contrast, industrial output for the manufacture of wearing apparel had returned close to its February 2020 level by August 2020, but output fell quite sharply for most of the remaining months of 2020 before stabilising in 2021; some volatility returned in the first couple of months of 2022.

The recovery for the manufacture of motor vehicles, trailers and semi-trailers continued over a few more months: in October 2020, output reached a level just 2 % below that observed in February 2020. Thereafter output declined most months, falling 32 % overall between October 2020 and September 2021. Output expanded somewhat in the remaining months of 2021, but volatility returned in the first few months of 2022.

**For continuously updated visualisations containing time series for industrial production:**

# 4 Construction

# Structure

**Construction activities include the construction of buildings, civil engineering and specialised construction activities. Across the EU, by far the largest of these three divisions was specialised construction activities: in 2019, these activities accounted for nearly three fifths (59.0 %) of construction value added and for an even higher share of construction employment (63.3 %).**

## Concentration of construction activity – top five EU Member States

(%, share of EU employment and value added for each activity, 2019)

**EU construction sector in 2019**

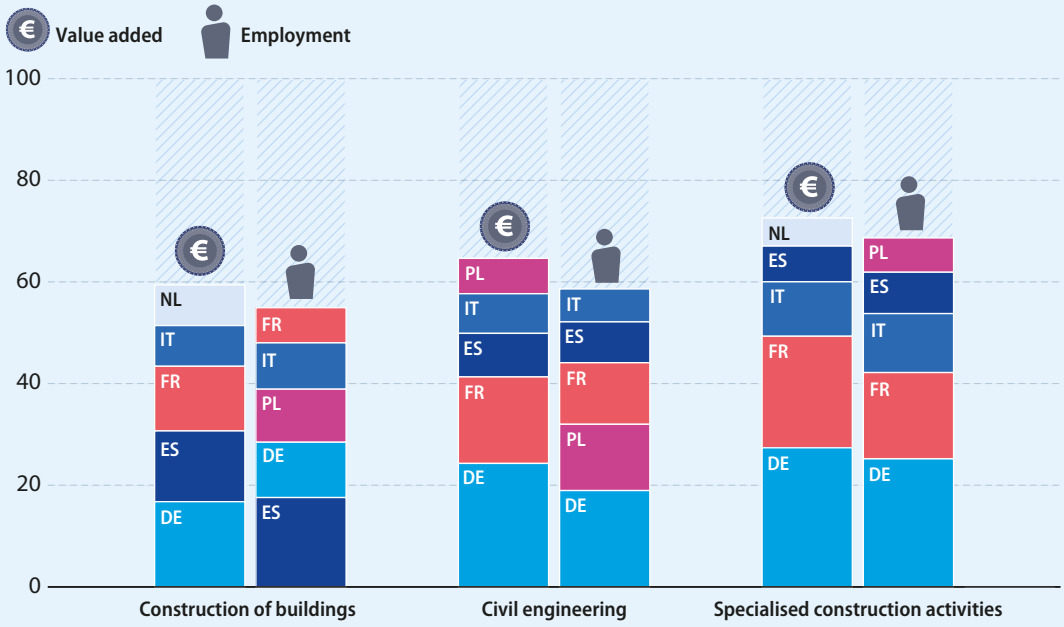
**3.4 million** enterprises

**12.7 million** persons employed

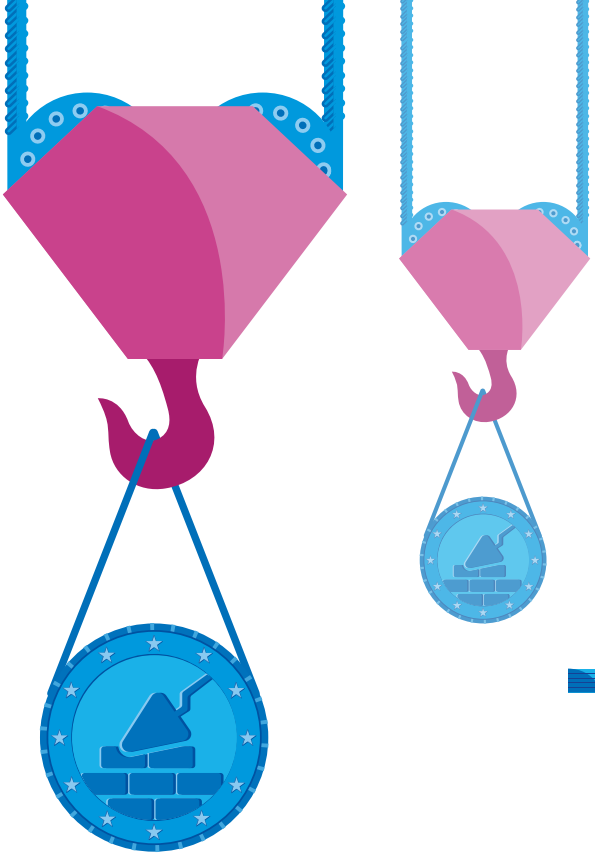
**€549 billion** of value added

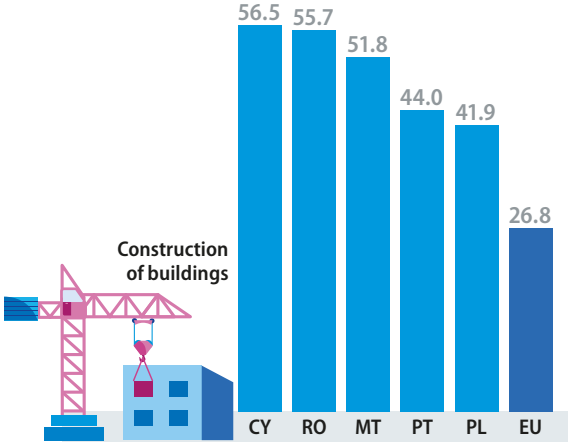
In all three of the construction divisions, the four largest EU Member States in value added terms were Germany, France, Italy and Spain; the Netherlands was fifth largest in the construction of buildings and in specialised construction activities while Poland was fifth largest in civil engineering. In 2019, Germany had the largest value added for the three construction divisions; France had the second largest value added for civil engineering and specialised construction activities, whereas Spain had the second largest value added for the construction of buildings.

In terms of employment, the five largest EU Member States in all three construction divisions were Germany, Spain, France, Poland and Italy. While Germany was the largest employer for civil engineering and for specialised construction activities, Spain had the largest workforce for the construction of buildings.




*Source:* Eurostat (online data code: sbs_na_con_r2)



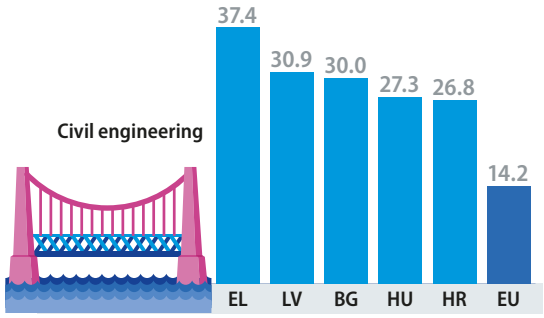


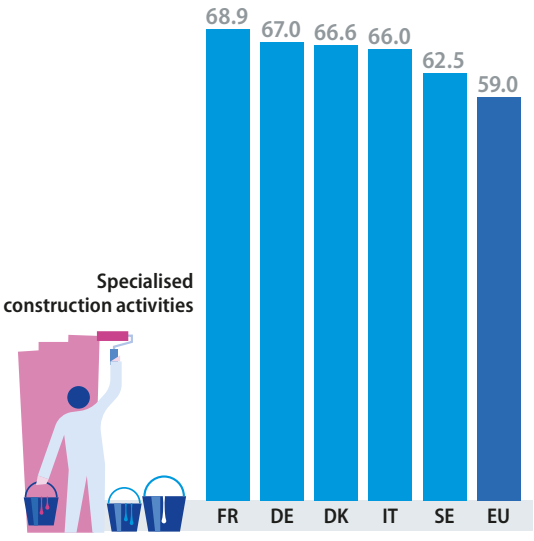

## Value added specialisation – top five EU Member States

(%, share of construction value added, 2019)

A lot of construction is done by enterprises serving a relatively small geographical market, with little international trade compared with many industrial activities. There are nevertheless quite large specialisations in the three construction divisions.

In 2019, over half of construction value added in Cyprus, Romania and Malta resulted from the construction of buildings, approximately double the average for the EU (26.8 %). In Greece, civil engineering contributed more than a third of the construction total and in Latvia and Bulgaria the share was around 30.0 %, also more than double the average for the EU (14.2 %). It was commonplace for specialised construction activities to account for more than half of construction value added: the EU average was 59.0 % and this share was around two thirds in Italy, Denmark, Germany and France.



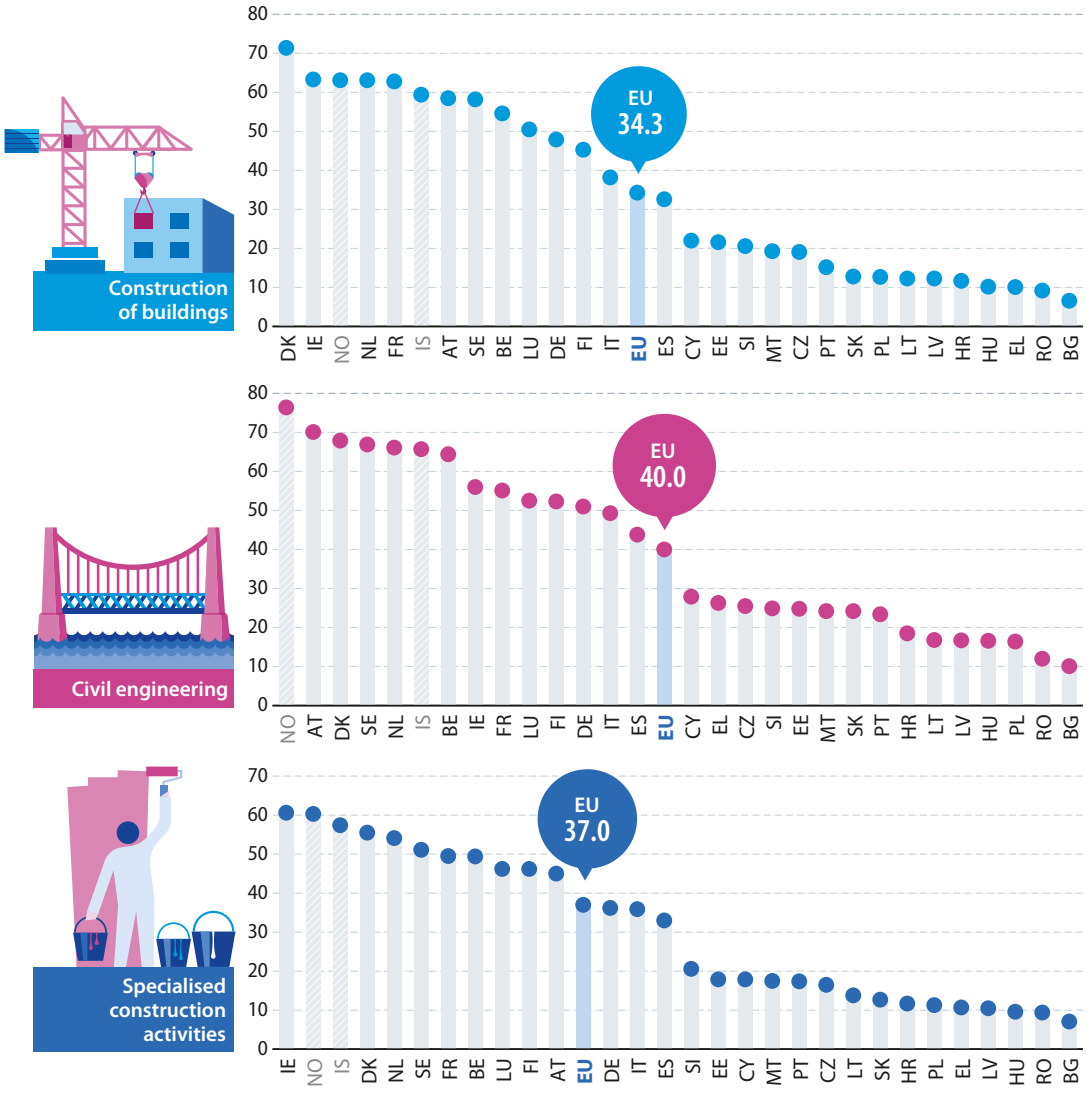




Note: data are shown for the three NACE Rev. 2 construction divisions.

*Source:* Eurostat (online data code: sbs_na_con_r2)

## Average personnel costs within construction divisions

(€ thousand per employee, 2019)




Note: IS, 2018.

*Source:* Eurostat (online data code: sbs_na_con_r2)

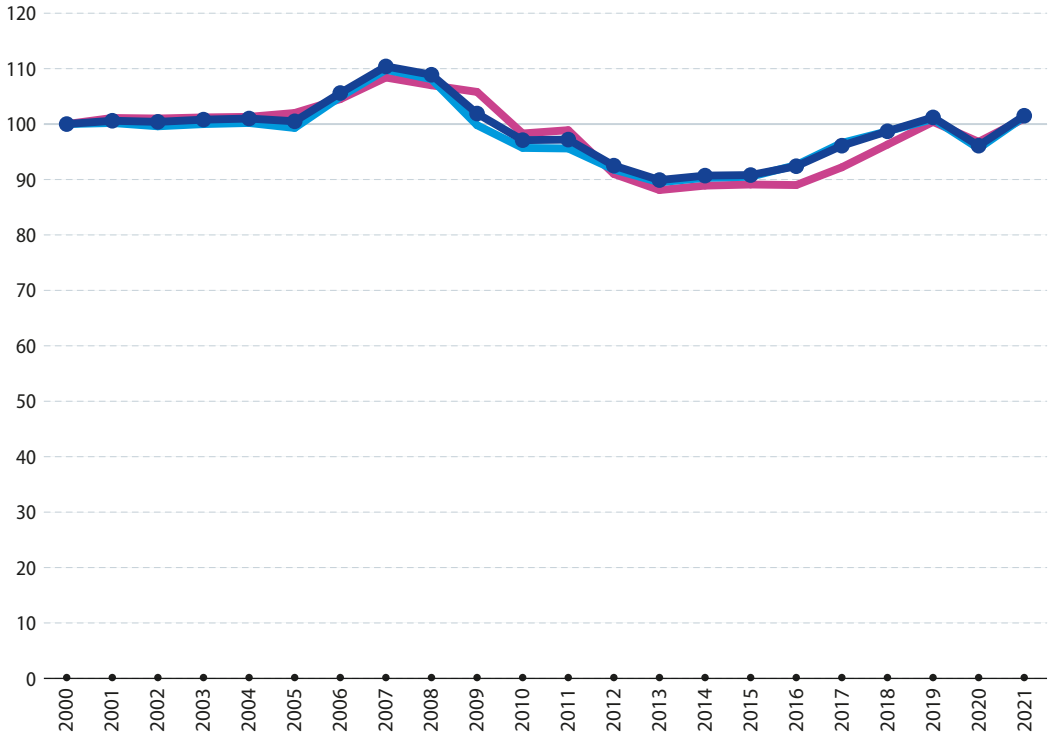
In 2019, average personnel costs across the three divisions of the EU's construction sector ranged from a high of €40 000 per employee for civil engineering down to €34 300 per employee for the construction of buildings.

In the EU, average personnel costs were lower for the construction of buildings than for the other two construction divisions. However, this situation was only observed in seven EU Member States. In a majority of Member States, the lowest average personnel costs were recorded for specialised construction activities (which dominate the construction sector in the largest Member States). In Ireland, the lowest average personnel costs were for civil engineering, while in Croatia and Slovenia the joint lowest average personnel costs were recorded for specialised construction activities and the construction of buildings.

# Developments

## Construction production index

(2000 = 100, EU, 2000–2021)




**Construction — total**

Building

Civil engineering

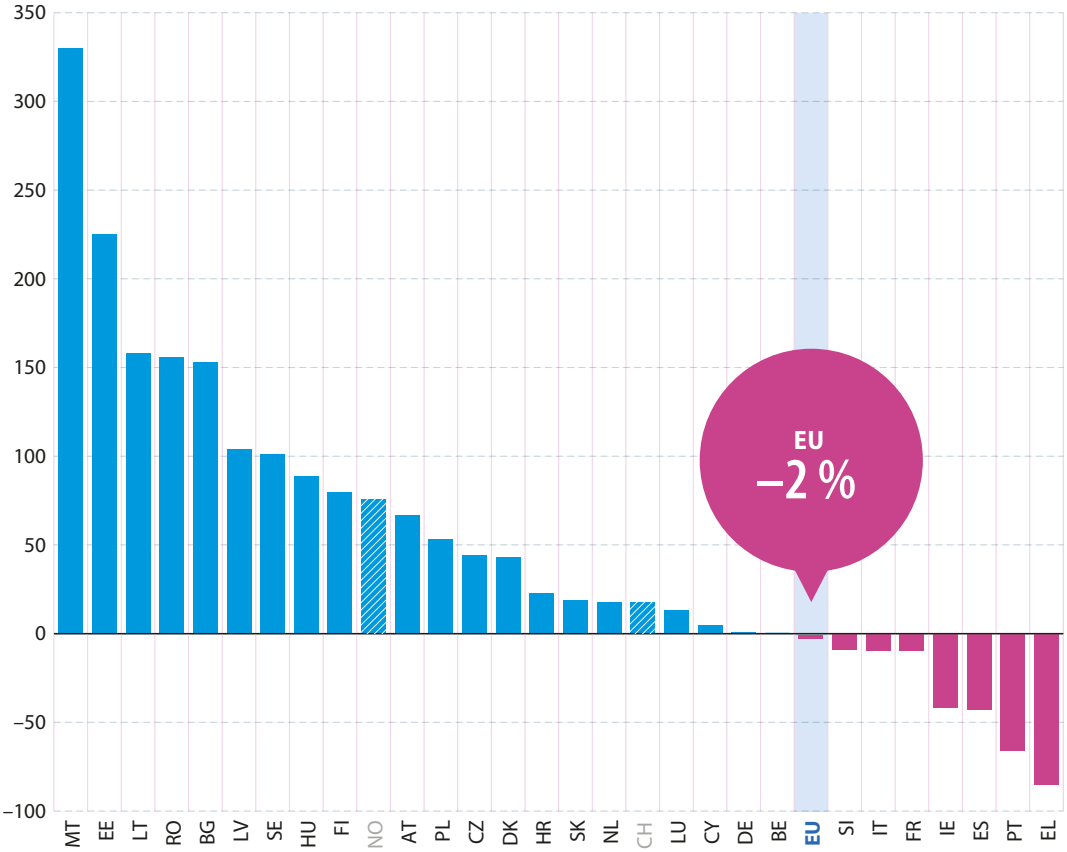
*Source:* Eurostat (online data code: sts_copr_a)

The construction production index reflects real terms (deflated) output developments for the construction activity. Construction output in the EU was relatively stable between 2000 and 2004 and then expanded up until 2007. In 2008, the impact of the global financial and economic crisis was felt; there was a decline in output recorded most years from 2008 to 2013. Despite some recovery thereafter, construction output in 2019 was still 8.3 % lower than it had been in 2007. In 2020, output fell 5.0 %, reflecting the impact of the COVID-19 pandemic. This fall was comparable in percentage terms with the falls recorded in 2009, 2010 and 2012. In 2021, output rebounded, increasing 5.7 % to a level slightly above that observed before the pandemic (in 2019).

The developments for building and civil engineering were quite similar, peaking in 2007, reaching a low point in 2013 and recovering only partially before turning down again in 2020 and back up in 2021. In 2021, building and civil engineering output were 7.7 % and 6.8 % below their respective 2007 peaks.

## Overall change in the construction production index

(%, 2000–2021)

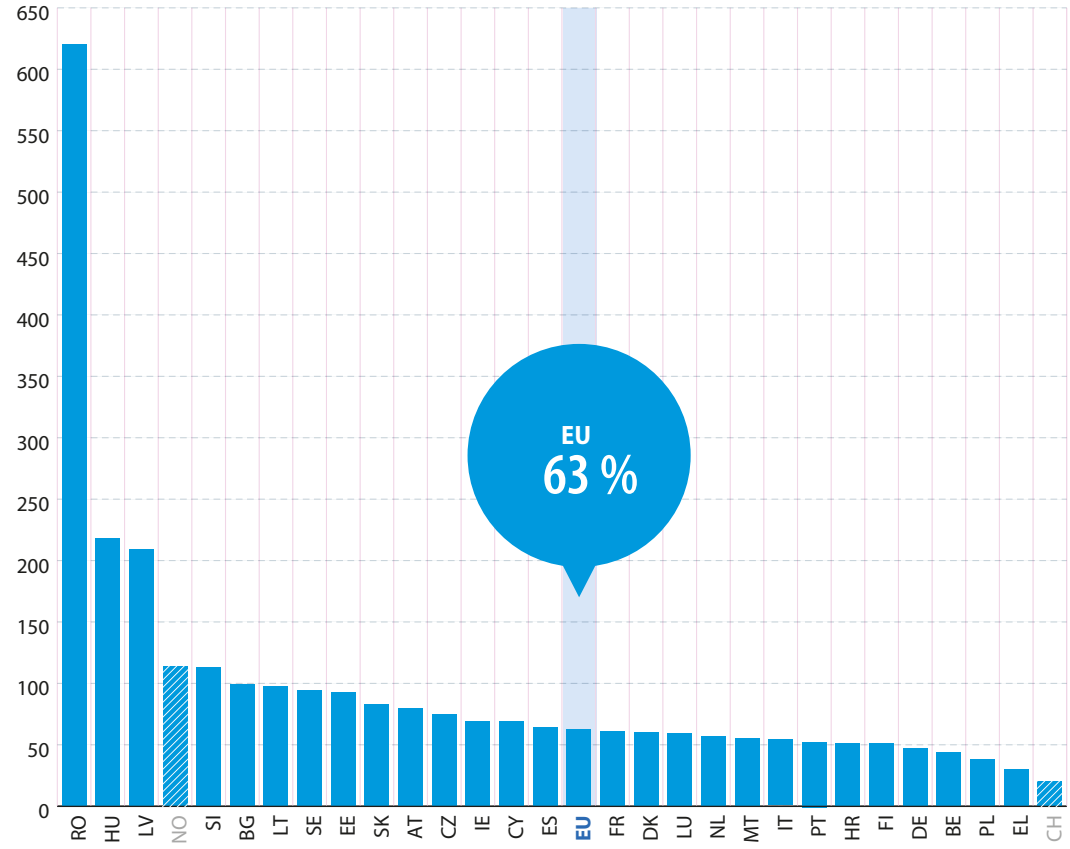



Although the EU's construction output was almost unchanged between 2000 and 2021 (down overall 2 %), developments varied greatly between the EU Member States. Greece's construction output in 2021 was 85 % below its 2000 level, while there were also considerable contractions recorded in Portugal (down 66 %), Spain (down 43 %) and Ireland (down 42 %). At the other end of the scale, construction output in Sweden, Latvia, Bulgaria, Romania and Lithuania more than doubled between 2000 and 2021, while in Estonia it more than tripled and in Malta more than quadrupled (up 330 %).

*Source:* Eurostat (online data code: sts_copr_a)

## Overall change in construction costs for new residential buildings

(%, 2000–2021)




The costs index is available for the construction of new residential buildings (excluding residences for communities). Between 2000 and 2021, construction costs for this type of building work increased 63 % within the EU. Cost increases were particularly large in Romania, where they were more than seven times as high in 2021 as they had been in 2000 (up 620 %); costs more than trebled in Hungary (up 218 %) and Latvia (up 209 %). The lowest increases for construction costs of new residential buildings were observed in Greece (up 30 %) and Poland (up 38 % between 2000 and 2020).

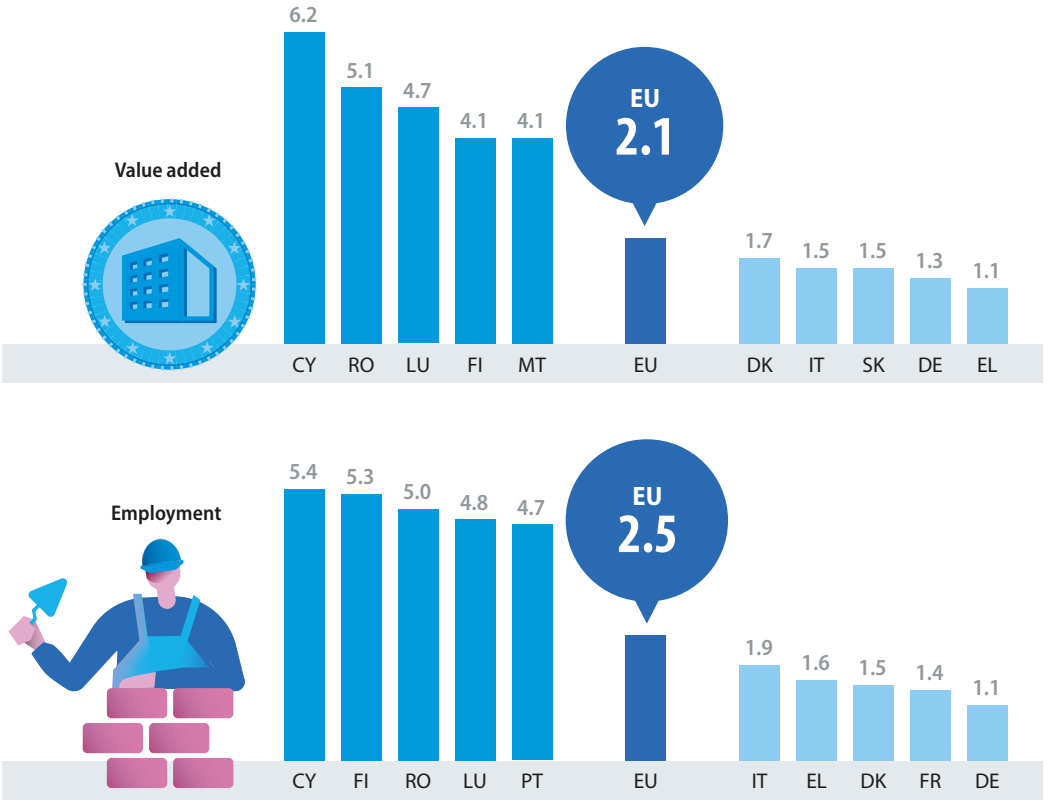
Note: the construction costs index for new residential buildings excludes residencies for communities. BG: 2003-2021. BE, DE, IE, FR, HR, LU, MT, PL, SK and CH: 2000-2020.

*Source:* Eurostat (online data code: sts_copi_a)

# Focus on building construction

## Construction of buildings – top five and bottom five EU Member States

(%, share of value added and the number of persons employed in the non-financial business economy, 2019)




Note: the construction of buildings covers NACE Rev. 2 Division 41.

*Source:* Eurostat (online data code: sbs_na_sca_r2)

The construction of buildings contributed with 2.1 % of value added in the EU's non-financial business economy in 2019 and employed 2.5 % of the workforce. Compared with the EU average, this activity accounted for more than double the non-financial business economy share in value added terms in Cyprus, Romania and Luxembourg and for double or more the share in employment terms in Cyprus, Finland and Romania. These relatively high shares reflect a number of factors driving demand (such as overall population growth and tourism-related construction activity), as well as characteristics of the organisation of the construction sector between builders and specialists.

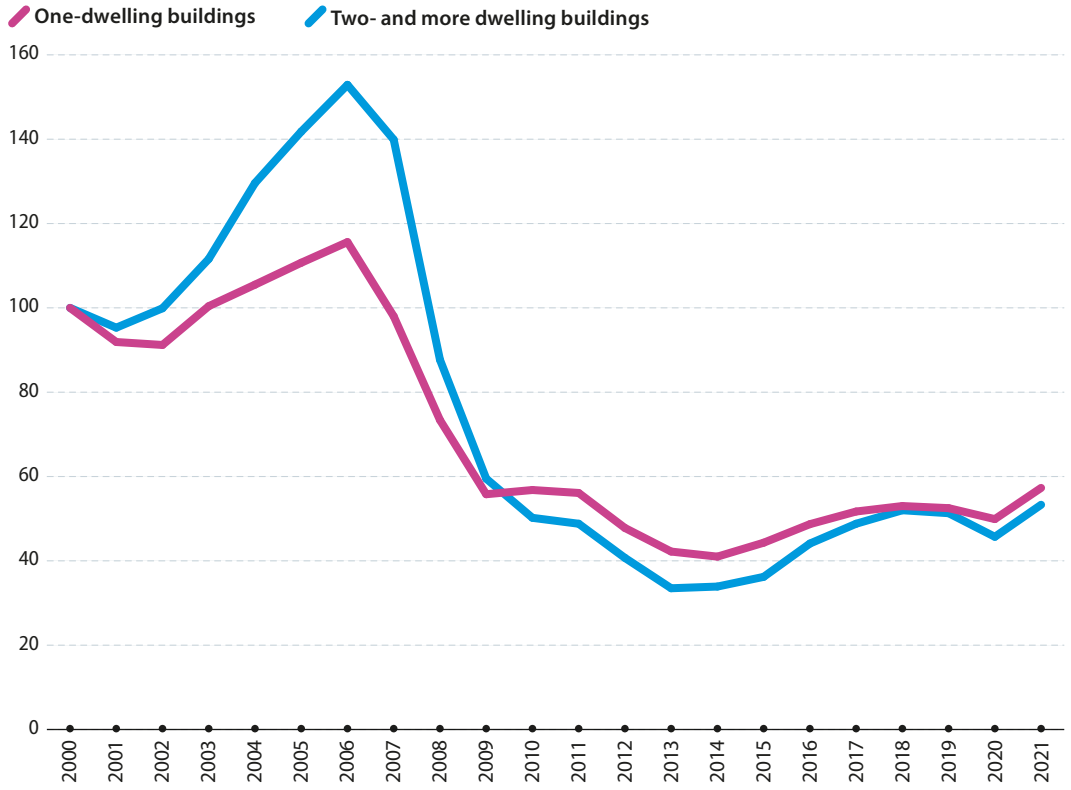
## Building permit index

(2000 = 100, EU, 2000–2021)

The index of building permits reflects the number of permits granted and therefore provides a measure of expected demand for building activity in the near future. The index is available for two types of buildings: one-dwelling residential buildings and residential buildings with two or more dwellings (but not residential buildings for communities). Across the EU, permits for both types of dwellings fell strongly from peaks in 2006 to relative lows in 2013 (for residential buildings with two or more dwellings) and 2014 (for one-dwelling residential buildings). Despite some recovery thereafter – interrupted in 2020 by the start of the COVID-19 pandemic – the index for one-dwelling residential buildings in 2021 was around half its 2006 peak level while the index for residential buildings with two or more dwellings was around one third its 2006 peak level.

Note: a building permit is an authorisation to start work on a building project; the index is based on the number of dwellings for which a permit has been granted.

*Source:* Eurostat (online data code: sts_copr_a)

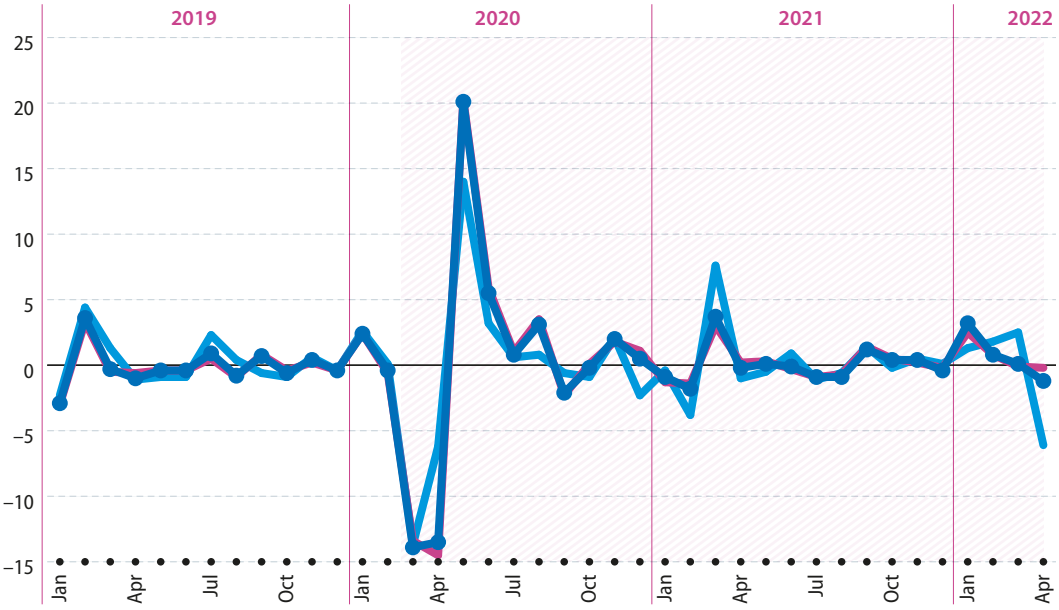


# Latest developments

**Monthly data for 2020 and to a lesser extent 2021 show the impact of the COVID-19 pandemic on construction. The most recent data for 2022 may be impacted by a wider range of issues, for example aftereffects of the COVID-19 crisis on supply chains and early impacts from the Russian military aggression against Ukraine and the related sanctions.**

## Construction production indices

(%, change compared with the previous month, EU, January 2019–April 2022)




**Construction – total**

Building

Civil engineering

*Source:* Eurostat (online data code: sts_copr_m)

The impact of the first wave of the COVID-19 pandemic and its accompanying restrictions can be seen by studying the change in the level of output in early 2020: construction output across the EU in April 2020 was 26 % lower than in February 2020. Output growth of 32 % between April and August 2020 brought construction output in August 2020 to a level that was 2 % less than it had been in February. Since then, output has been quite stable, with somewhat stronger growth recorded in March 2021 (up 3.7 %) and January 2022 (up 3.2 %). By April 2022, construction output was 1.8 % higher than before the pandemic; for building construction, the level was 3.1 % higher; for civil engineering, it was 3.3 % lower.

**For continuously updated visualisations containing time series for construction:**

# 5 Distributive trades

# Structure

**Distributive trades cover motor, wholesale and retail trades. Wholesale trade was the largest of these three divisions in value added terms, with 49.7 % of the distributive trades total in 2019 compared with 38.1 % for retail trade. In employment terms, the situation was reversed, with retail trade contributing 55.3 % compared with 32.6 % for wholesale trade.**

## Concentration of distributive trades activity – top five EU Member States

(%, share of EU employment and value added for each activity, 2019)

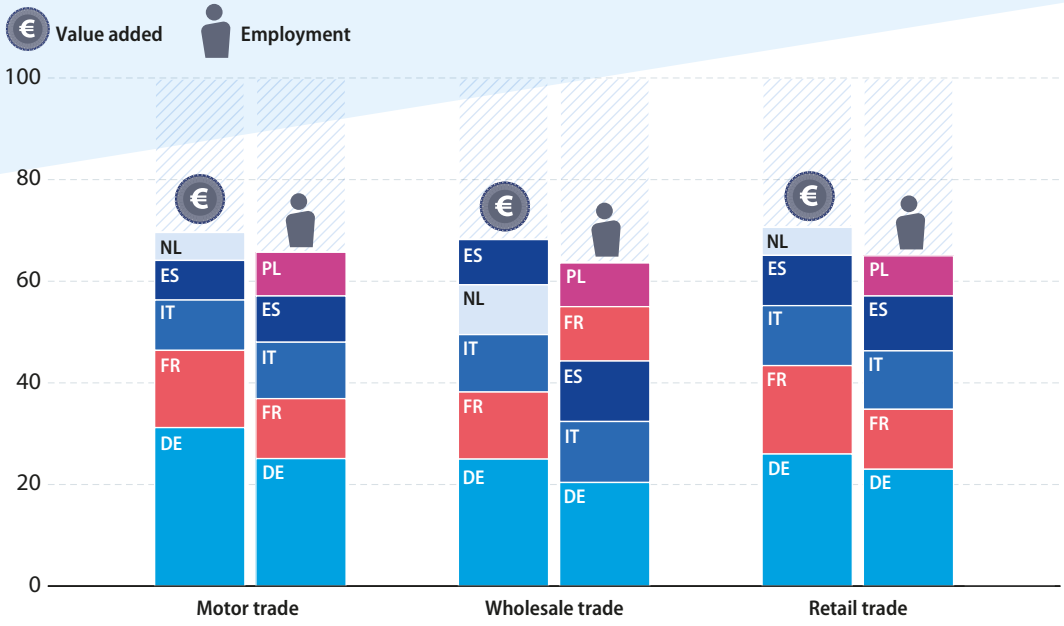
**EU distributive trades in 2019**

**5.7 million** enterprises

**29.4 million** persons employed

**€1.28 trillion** of value added

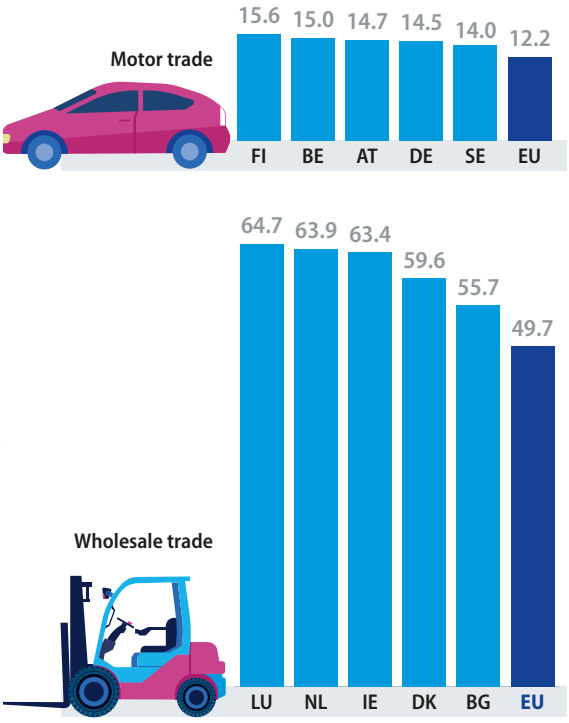
Germany had the largest share of EU value added in all three distributive trades divisions in 2019, followed by France and Italy. For motor trade and for retail trade, Spain had the fourth largest share followed by the Netherlands, while this order was reversed for wholesale trade. In employment terms, the main difference was that Poland was the fifth largest EU Member State (whereas the Netherlands was not in the top five). In addition, the ranking was somewhat different for wholesale trade, as France's level of employment in this activity was smaller than the employment levels of Italy and of Spain.




*Source:* Eurostat (online data code: sbs_na_dt_r2)


## Value added specialisation – top five EU Member States

(%, share of distributive trades value added, 2019)




Given the essential, local nature of many distributive trade activities, there tends to be less geographical specialisation than observed for many industrial or other service activities. For example, 15.6 % of distributive trades value added in Finland was recorded in motor trades in 2019, more than in any other EU Member State, but this was not much higher than the EU average (12.2 %).

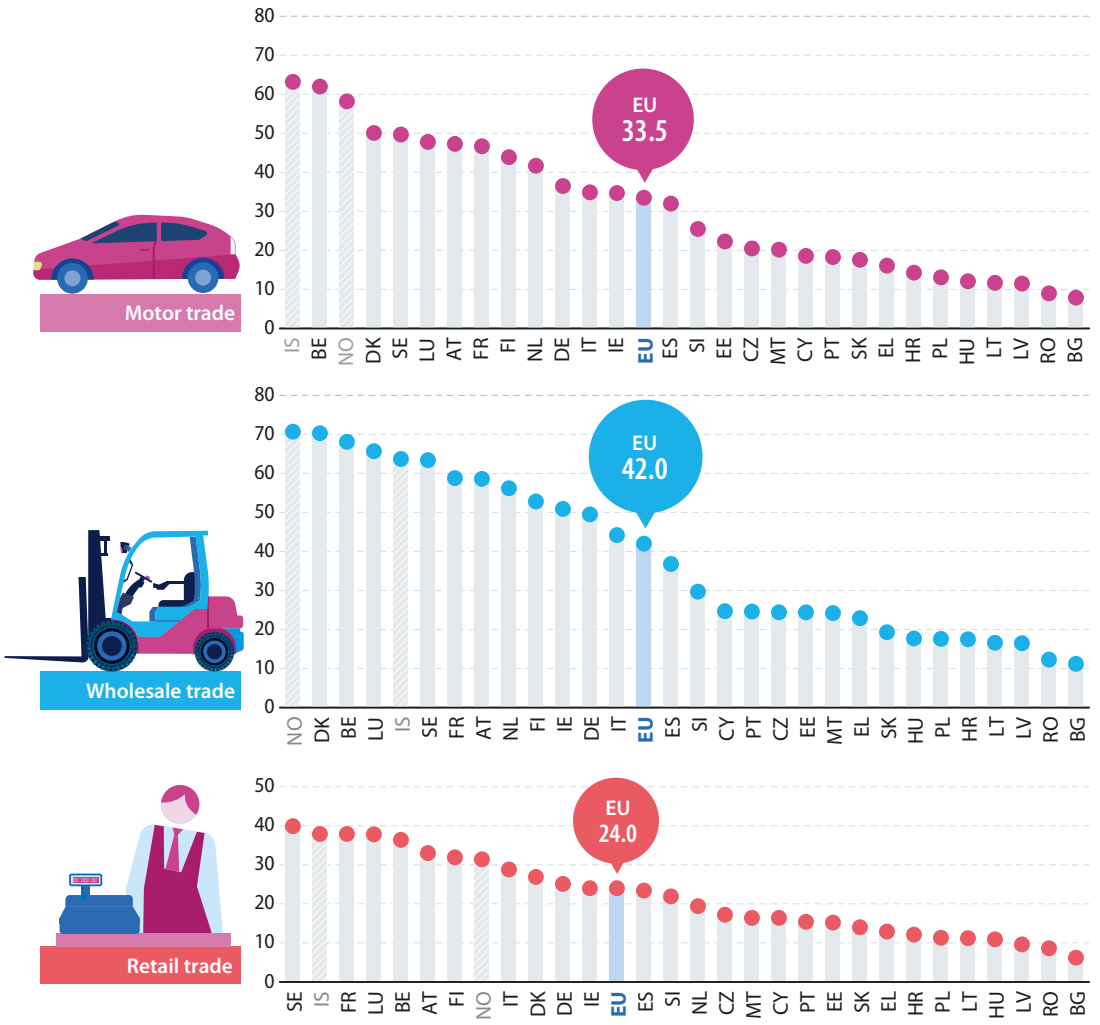
Luxembourg (64.7 %) and the Netherlands (63.9 %) were the top two EU Member States in terms of the contribution made by wholesale trade to distributive trades' value added in 2019, underlying their specialisation in distribution, transport and logistics; they were closely followed by Ireland (63.4 %). Cyprus (47.3 %), Malta (47.2 %) and Croatia (47.1 %) – three Member States that host large numbers of tourists each year – recorded the highest contributions of retail trade to distributive trades' value added.

Note: data are shown for the three NACE Rev. 2 distributive trades divisions.

*Source:* Eurostat (online data code: sbs_na_dt_r2)

## Average personnel costs within distributive trades divisions

(€ thousand per employee, 2019)




Note: IS, 2018.

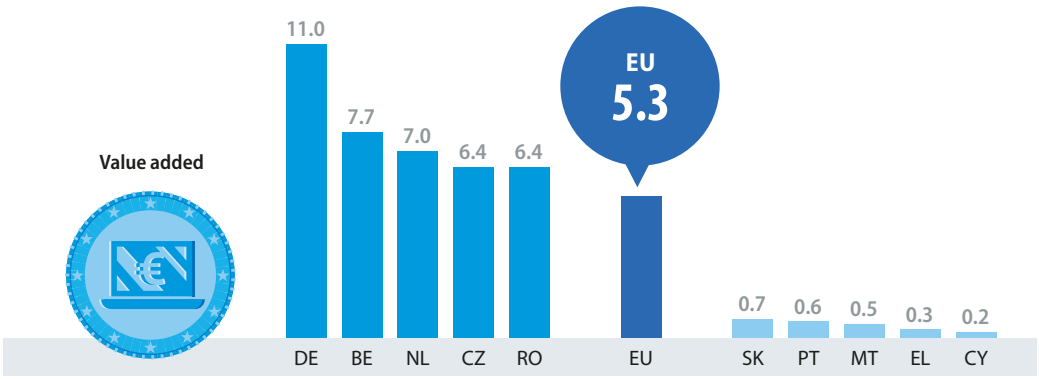
*Source:* Eurostat (online data code: sbs_na_dt_r2)

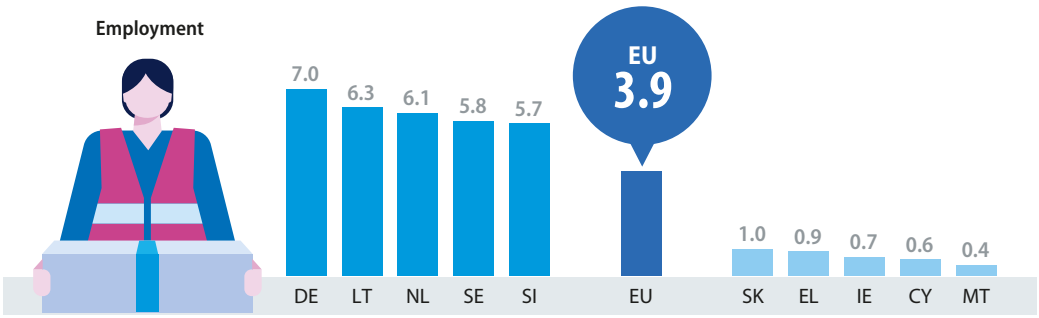
Typically, the lowest average personnel costs can often be observed in sectors with a high incidence of part-time and seasonal work, such as retail trade. Across the EU's distributive trades' sector, average personnel costs in 2019 ranged from a high of €42 000 per employee for wholesale trade down to a low of €24 000 per employee for retail trade.

In 2019, Denmark recorded the highest average personnel costs among EU Member States for wholesale trade (€70 300 per employee). Belgium had the highest average personnel costs for motor trade (€62 000 per employee), while Sweden had the highest average personnel costs for retail trade (€39 900 per employee). At the other end of the scale, the lowest average personnel costs for all three distributive trades divisions were recorded in Bulgaria, Romania and Latvia.

## Retail sale via mail order houses or via internet – top five and bottom five EU Member States

(%, share in retail trade, 2019)




Internet retailing has gained in significance over many years. In 2019, the subsector covering retail sale via mail order houses or via internet accounted for 5.3 % of retailing value added and 3.9 % of retailing employment within the EU. In value added terms, Germany, Belgium and the Netherlands were the most specialised EU Member States in these forms of remote trading, while Greece and Cyprus were the least specialised.

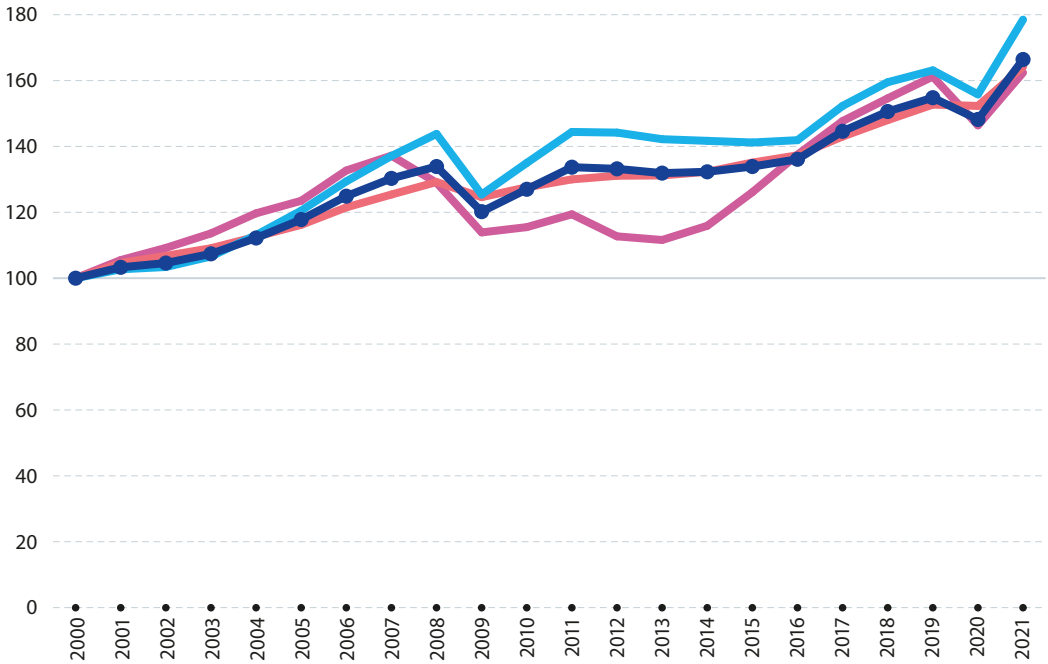
Note: retail trade covers NACE Rev. 2 Division 47 and retail sale via mail order houses or via internet covers NACE Rev. 2 Class 47.91. LU: not available.

*Source:* Eurostat (online data code: sbs_na_dt_r2)

# Developments

## Distributive trades turnover index

(2000 = 100, EU, 2000–2021)




Note: based on turnover value indices.

*Source:* Eurostat (online data code: sts_trtu_a)

The turnover index illustrates the development of sales in current prices, in other words this index has not been adjusted to remove the effects of prices changes. Between 2000 and 2021, the EU turnover index for distributive trades increased 66 % overall, equivalent to an average of 2.5 % per year.

In the years just before the global financial and economic crisis, the increase in the EU distributive trades turnover index slowed before a fall of 10.2 % was observed in 2009. Growth returned quite strongly in 2010 and 2011 but thereafter the rates of change were rather subdued for several years (including slight falls in turnover in 2012 and 2013). Stronger growth was again observed from 2017 to 2019 before a fall of 4.2 % was recorded in 2020, reflecting the impact of the COVID-19 pandemic, followed by a rebound of 12.3 % in 2021.

In turnover terms, the fastest growing distributive trades activity in the EU was wholesale trade; its turnover was 79 % higher in 2021 than it had been in 2000, an annual average increase of 2.8 %. Increases in turnover for the retail and motor trades were slightly more subdued, up 64 % and 62 % overall between 2000 and 2021.

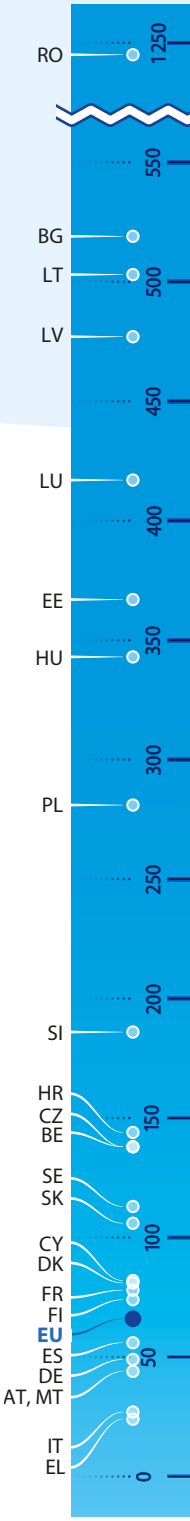
## Overall change in the distributive trades turnover index

(%, 2000–2021)

Developments in distributive trades turnover between 2000 and 2021 varied enormously between the EU Member States, reflecting differences in prices changes as well as underlying real changes. During this period, only six Member States recorded a lower overall change than was observed for the EU as a whole (up 66 %); among these were three of the largest, namely Spain, Germany and Italy. The largest overall increases in distributive trades turnover were recorded in Romania (up 1 245 %), Bulgaria (519 %), Lithuania (503 %), Latvia (477 %), Luxembourg (417 %), Estonia (367 %) and Hungary (343 %).

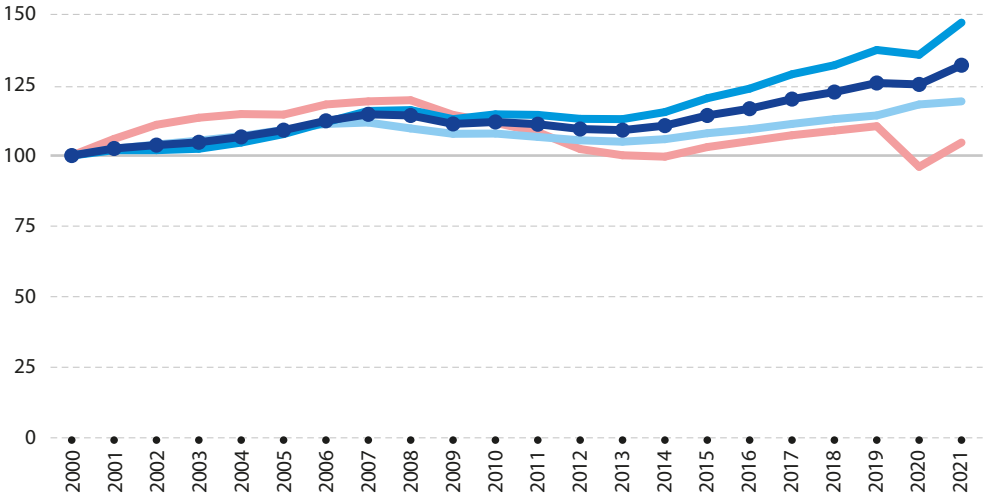

Note: based on turnover value indices. IE, NL and PT: not available.

*Source:* Eurostat (online data code: sts_trtu_a)




## Volume of sales index for retail trade

(2000 = 100, EU, 2000–2021)




**Retail trade — total**

Retailing of non-food products (1)

In-store retailing of food, beverages and tobacco

Specialised retailing of automotive fuel

Note: based on deflated turnover indices. Retail trade covers NACE Rev. 2 Division 47. (1) Also includes all retail trade not in stores.

*Source:* Eurostat (online data code: sts_trtu_a)

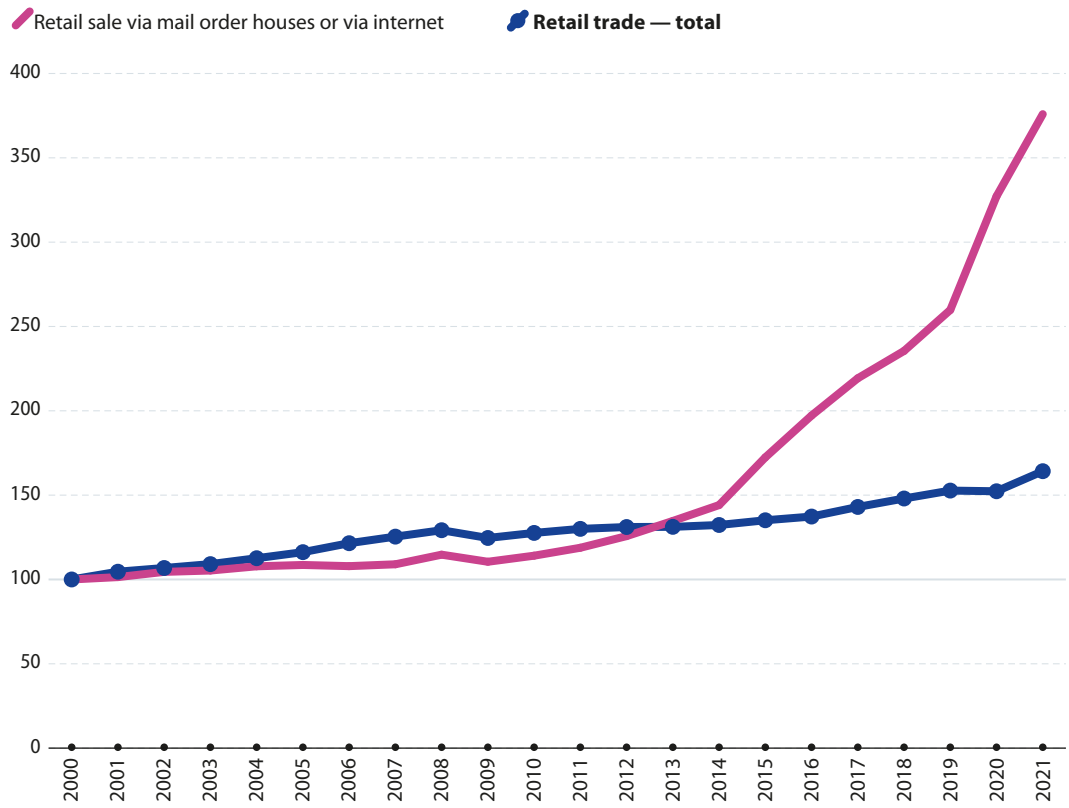
The volume of sales index for retail trade is adjusted for price changes in the goods that are sold. Between 2000 and 2021, this index increased 32 % overall in the EU, compared with an increase of 64 % for the retail trade turnover index (in current price terms). An overall increase (in volume terms) was observed between 2000 and 2021 for three types of retailing: non-food, food and automotive fuel retailing. Non-food retailing increased the most, up 47 % overall, while food retailing increased 19 % and automotive fuel 5 %.

The COVID-19 pandemic had a diverging impact on the retail sale of these goods. The volume of sales for food, beverages and tobacco was up 3.4 % in 2020, while a relatively small decline was recorded for non-food products (down 1.2 %) and a considerable decline for automotive fuel (down 13.1 %).

The volume of sales for food, beverages and tobacco continued upwards in 2021, but at a more subdued pace (up 0.9 %), while non-food retailing grew by 8.3 %, approximately double the next highest growth recorded in any of the previous 20 years. Growth for the retailing of automotive fuel was 9.0 % in 2021, recovering much but not all of the decline observed in 2020.

## Turnover index for retail trade and retail sale via mail order houses or via internet

(2000 = 100, EU, 2000–2021)




Note: based on turnover value indices. Retail trade covers NACE Rev. 2 Division 47 and retail sale via mail order houses or via internet covers NACE Rev. 2 Class 47.91.

*Source:* Eurostat (online data code: sts_trtu_a)

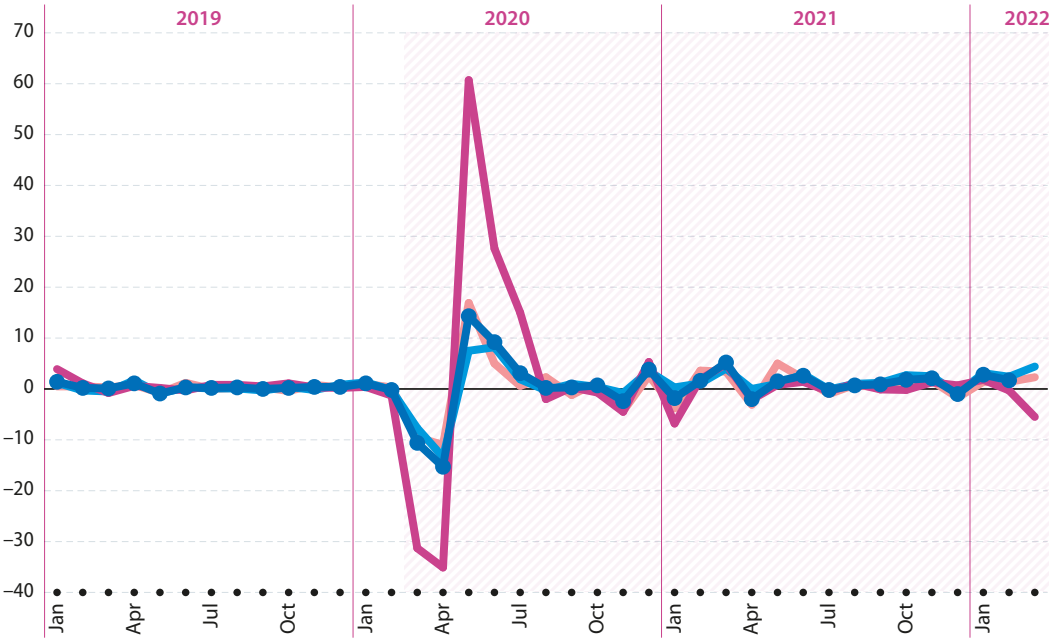
As already noted, internet retailing has gained in significance over many years. Between 2000 and 2021, the EU turnover index for retail sale via mail order houses or via internet increased 276 %, corresponding to an average of 6.5 % per year. For comparison, the average increase for retail trade as a whole was 64 %, equivalent to 2.4 % per year. Turnover growth for retail sale via mail order houses or via internet was relatively moderate before 2008, was generally higher thereafter and has been particularly strong since 2015: annual growth rates were 10 % or higher in six out of the seven most recent years for which data are available, including 25.9 % growth in 2020 and 14.9 % growth in 2021.

# Latest developments

**Monthly data for 2020 and to a lesser extent 2021 show the impact of the COVID-19 pandemic on distributive trades. The most recent data for 2022 may be impacted by a wider range of issues, for example aftereffects of the COVID-19 crisis on supply chains and early impacts from the Russian military aggression against Ukraine and the related sanctions.**

## Distributive trades turnover indices

(%, change compared with the previous month, EU, January 2019–March 2022)




**Retail trade – total**

Retail trade
Wholesale trade
Motor trade

Note: March 2022, not available for distributive trades.

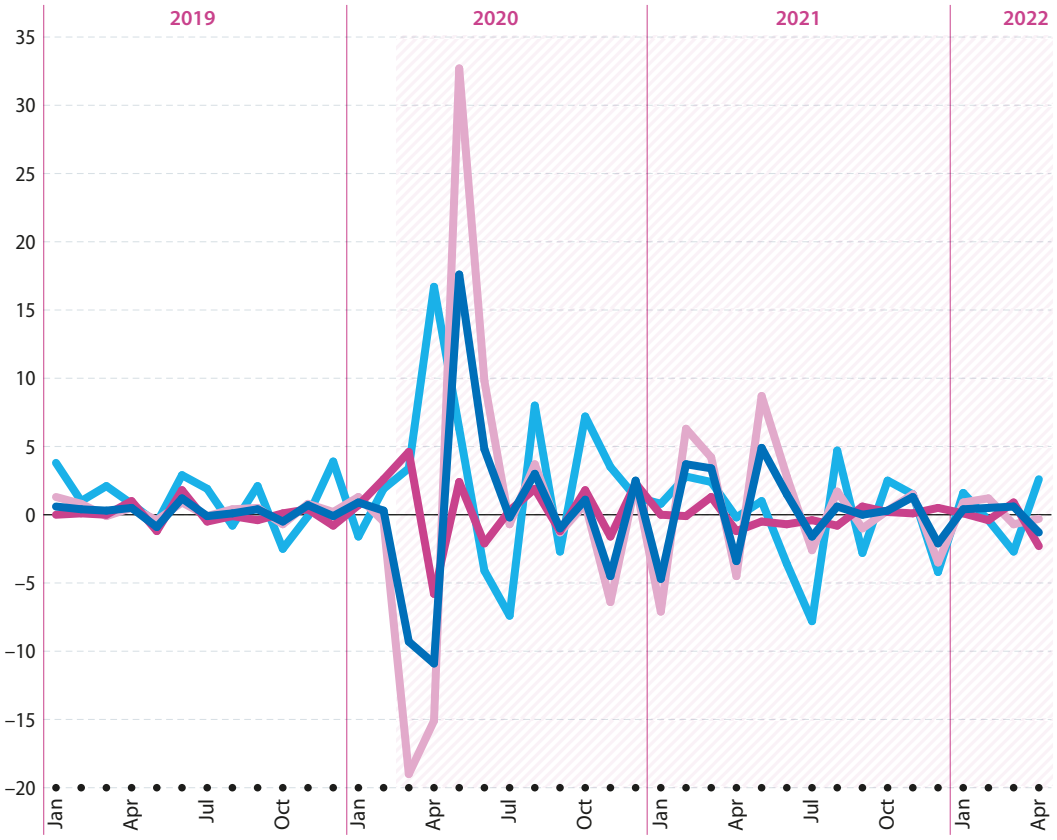
*Source:* Eurostat (online data code: sts_trtu_m)

The main decline in distributive trades turnover during the early stage of the COVID-19 crisis was in March and April 2020, with a strong but partial recovery in May and June. To assess the impact of the first wave of the pandemic, sales in April 2020 can be compared with those in February 2020. The strongest decline among the distributive trades divisions was recorded for motor trades, as EU sales were down 55 % overall; by contrast, turnover fell 20 % for wholesale trade and 19 % for retail trade.

Distributive trades turnover rebounded strongly in the late spring / early summer of 2020 and continued a generally upward development through the rest of 2020, all of 2021 and into 2022. By February 2021, distributive trades turnover was close to the level it had been in February 2020; by February 2022, it was 17 % above its pre-pandemic level.

## Volume of sales index for retail trade

(%, change compared with the previous month, EU, January 2019–April 2022)




**Retail trade – total**

In-store retailing of food, beverages and tobacco

Non-food products (including automotive fuel)

Via mail order houses or via internet

Note: the retailing of non-food products includes all retail trade not in stores (whether of food, beverages or tobacco or not), including retailing via mail order houses or via internet.

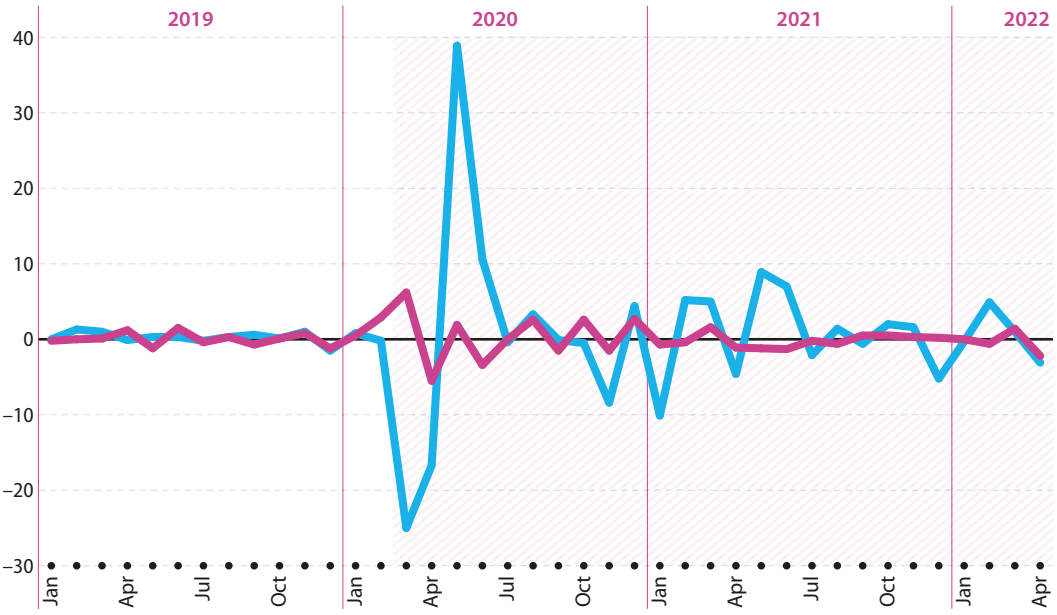
*Source:* Eurostat (online data code: sts_trtu_m)

The pandemic had a particularly large impact on the development of retailing. Between February and April 2020, the EU volume of sales index fell 31 % for non-food products (including automotive fuel), compared with 1 % for food, beverages and tobacco, while there was a 21 % increase in sales via mail order houses or via internet. By June 2020, the volume of sales index for retail trade was approximately back to the level it had been in February 2020; for sales via mail order houses or via internet, the index was 23 % above the February level.

During the winter months, the EU's retail trade volume of sales fell again, down 4.5 % in November 2020 and 4.7 % in January 2021, with growth of 2.5 % between these two values. Relatively rapid growth in February, March and May 2021 was interrupted by a fall of 3.4 % in April. By May 2021, the volume of sales index for retail trade was 4 % above the level it had been in February 2020, with sales via mail order houses or via internet up 44 %. More subdued monthly rates of change returned from June 2021 through to April 2022, ranging between -2.1 % and 1.5 %.

## Volume of sales index for retail trade in non-specialised stores

(%, change compared with the previous month, EU, January 2019–April 2022)




**Non-specialised stores with food, beverages or tobacco predominating**

**Other non-specialised stores**

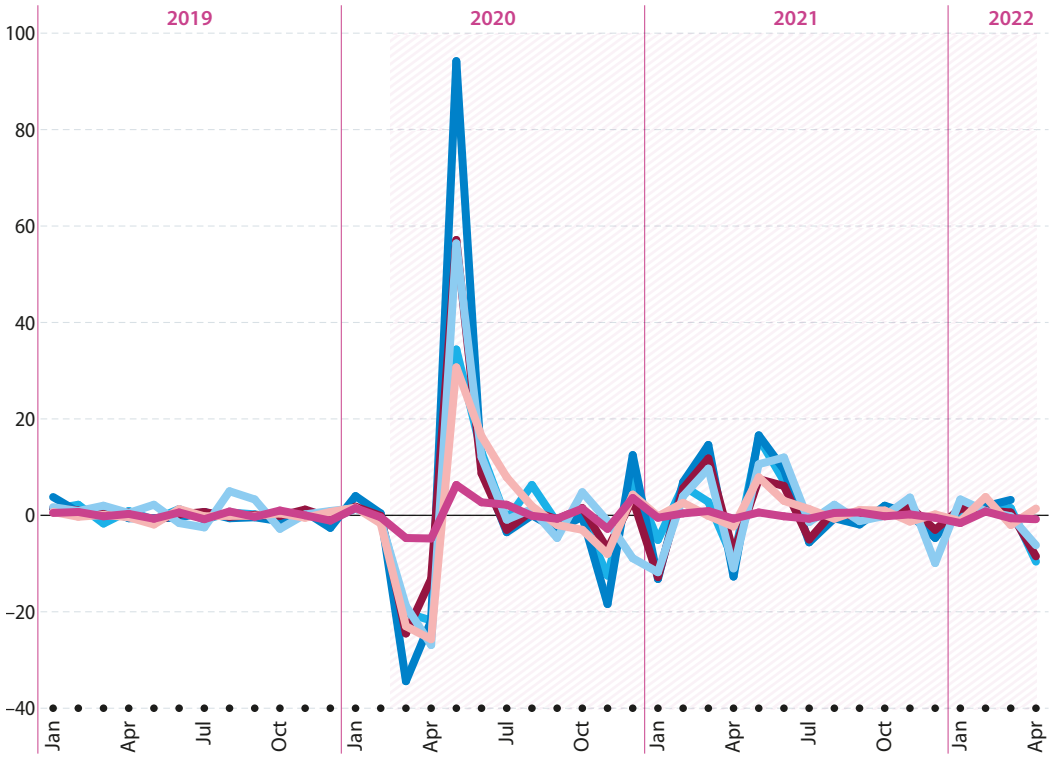
*Source:* Eurostat (online data code: sts_trtu_m)

Looking in more detail at the volume of sales for non-specialised in-store retailing, the developments for food, beverage and tobacco retailers were more volatile than usual during the early months of the pandemic – particularly from February to June 2020 – as rates of change ranged from -5.5 % to 6.2 %. From January 2021 to March 2022, the monthly rates of change for the volume of sales were in the range of -1.3 % to 1.6 %, broadly in line with pre-pandemic developments. A notably stronger fall, down 2.2 %, was observed in April 2022.

For the non-food non-specialised stores, the developments during the early months of the pandemic were much more volatile: falls of 25.0 % and 16.7 % were recorded in March and April 2020, followed by a partial rebound of 38.9 % and 10.6 % in May and June 2020. The volume of sales for this activity remained volatile, with rates of change in late 2021 and early 2022 often greater than those recorded before the pandemic.

## Volume of sales index for retail trade in specialised stores

(%, change compared with the previous month, EU, January 2019–April 2022)




- **Food, beverages and tobacco**
- **Automotive fuel**
- **Information and communication equipment**
- **Other household equipment**
- **Cultural and recreation goods**
- **Other non-food goods**

Note: April 2022, not available for specialised retail of cultural and recreation goods.

*Source:* Eurostat (online data code: sts_trtu_m)

Turning to specialised in-store retailing, the developments for food, beverage and tobacco retailers were also more volatile than usual during the early months of the pandemic. As for their non-specialised counterparts, the developments for their volume of sales returned to relative stability at the beginning of 2021.

The five non-food specialised in-store retailing activities experienced a strong downturn in the volume of sales in March and April 2020, followed by a rebound during the next two months. For information and communication equipment retailing, other household equipment retailing, and cultural and recreation goods retailing, the rebound was strong enough that the volume of sales was higher in June 2020 than in February 2020. For these five non-food activities, the developments for the volume of sales remained volatile until June or July 2021. From the summer of 2021 onwards, rates of change were closer to those observed before the pandemic, although there were some relatively high rates of change – some positive and some negative – for individual activities during the winter of 2021/22 and into spring 2022.

**For continuously updated visualisations containing time series for retail trade:**

# 6 Other non-financial services


# Structure

**Other non-financial services include seven activities: transportation and storage; accommodation and food services; information and communication services; real estate activities; professional, scientific and technical services; administrative and support services; repair of computers and personal and household goods.**

**In value added terms, the largest of these activities in the EU in 2019 was professional, scientific and technical activities, with a 22.5 % share of the total.**

## Concentration of other non-financial services activity – top five EU Member States

(% share of EU employment and value added for each activity, 2019)

**EU other non-financial service in 2019**

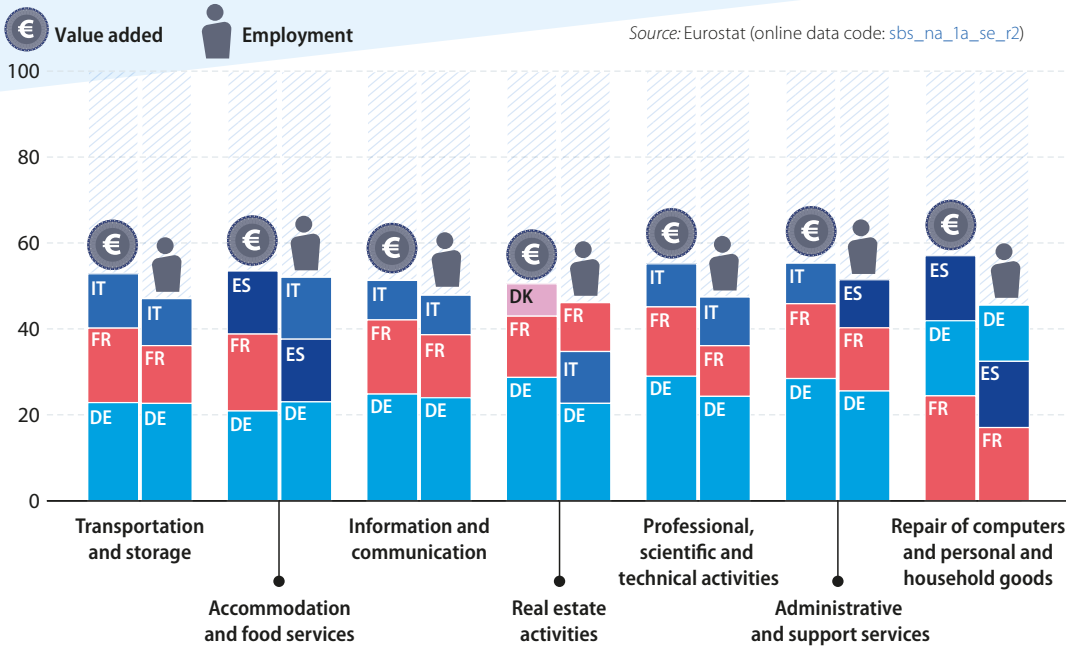
**11.7 million** enterprises

**56.0 million** persons employed

**€2.66 trillion** of value added

In 2019, Germany had the highest share of EU value added for six out of the seven subsectors included within other non-financial services aggregate and was (for each of these) followed by France. The order of these two EU Member States was reversed for the relatively small activity of repair of computers and personal and household goods: France had the largest share ahead of Germany the second largest. For most of the seven subsectors, Italy or Spain had the third highest value added. The exception was real estate activities as Denmark's share was third highest.

In terms of employment, Germany had the highest share for the same six subsectors. For four of these France recorded the second highest share; Spain had the second largest workforce for accommodation and food services; Italy had the second largest workforce for real estate activities. As for value added, in employment terms France had the largest share of the repair of computers and personal and household goods, followed by Spain.




*Source:* Eurostat (online data code: sbs_na_1a_se_r2)

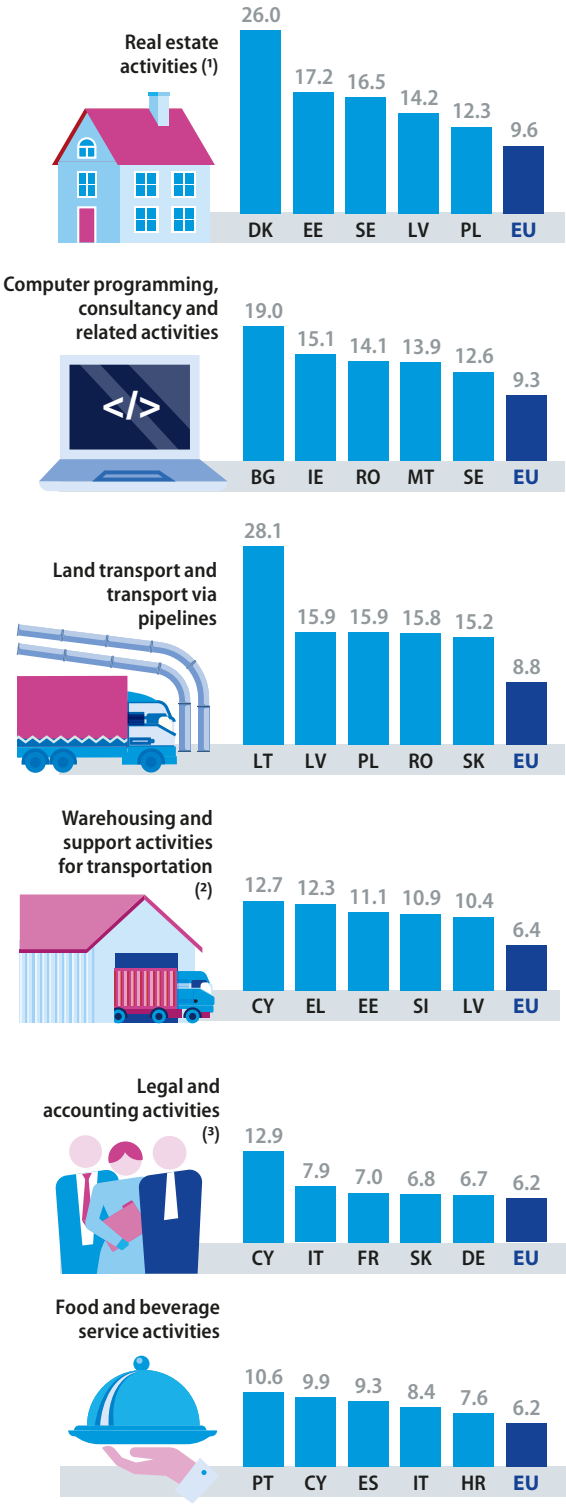
## Value added specialisation – top five EU Member States

(% share of other non-financial services value added, 2019)

In value added terms, the largest other non-financial service divisions in the EU in 2019 were: real estate activities; computer programming, consultancy and related activities; land transport and transport via pipelines; warehousing and support activities for transportation; legal and accounting activities; and food and beverage services.

Denmark was highly specialised in real estate activities, adding 26.0 % of its non-financial services value added in this activity. Bulgaria and Ireland were the most specialised in computer programming, consultancy and related activities. By far the most specialised EU Member State in land transport and transport via pipelines was Lithuania, as 28.1 % of its value added in other non-financial services in 2019 was recorded in this subsector; for comparison, the EU average was 8.8 %.

Cyprus and Greece were the most specialised EU Member States in warehousing and support activities for transportation, as more than 12.0 % of their value added in non-financial services in 2019 was in this subsector, around double the EU average (6.4 %). The most specialised Member State in legal and accounting activities was also Cyprus, recording 12.9 % of its value added in non-financial services in this subsector, more than double the EU average (6.2 %). There was less specialisation in food and beverage service activities: the highest share was 10.6 % in Portugal, compared with the EU average of 6.2 %.




Note: data are shown for the six largest other non-financial services based on EU value added for NACE Rev.2 other non-financial service divisions. (1) FI: not available. (2) LU: not available. (3) EU: excluding LU. LU: not available.

*Source:* Eurostat (online data code: sbs_na_1a_se_r2)

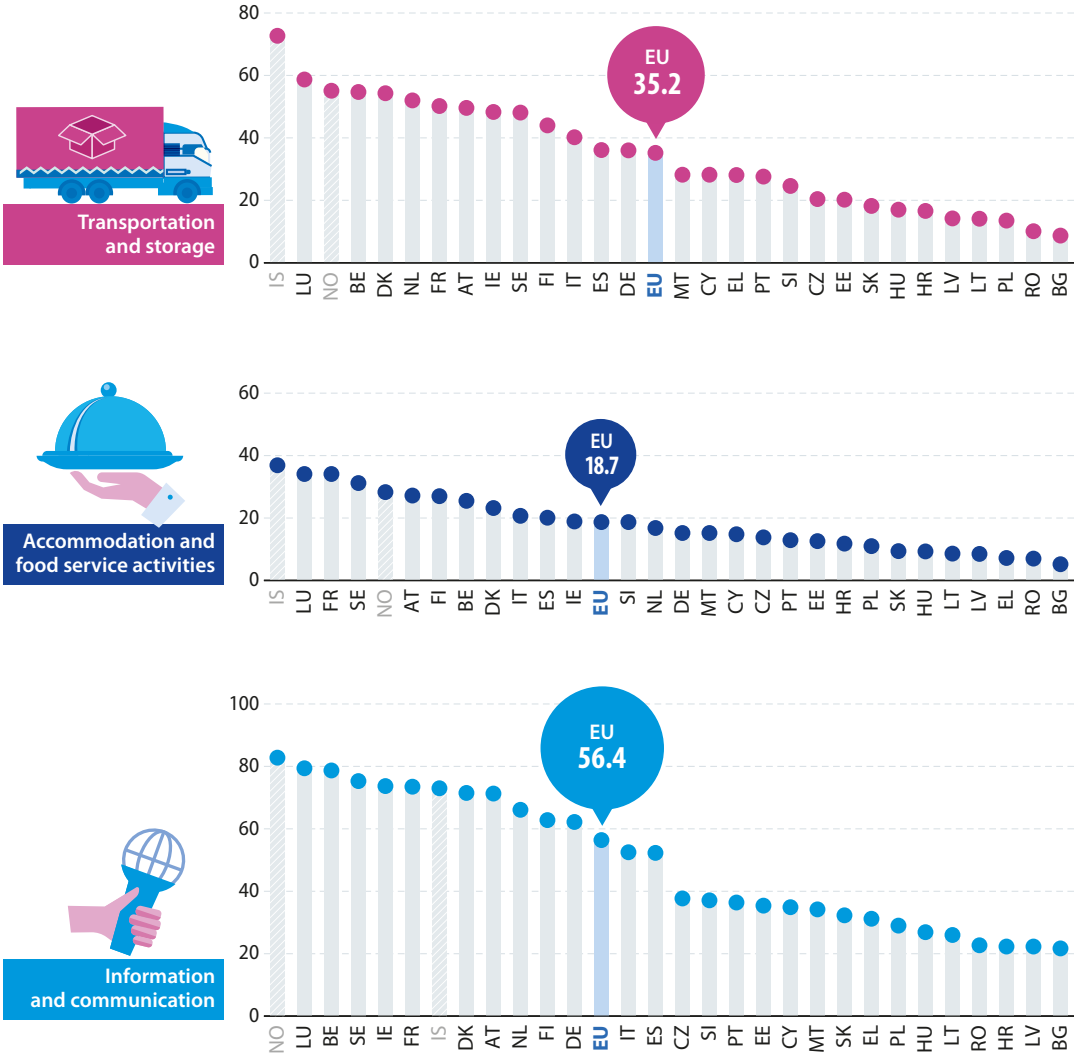
## Average personnel costs within other non-financial service sections

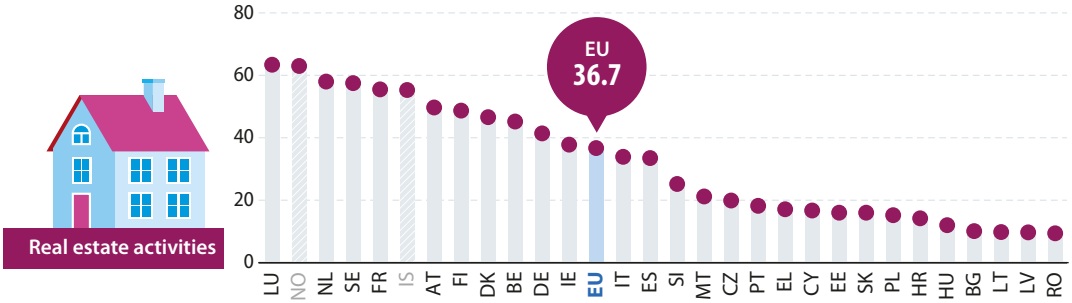
(€ thousand per employee, 2019)

Typically, the lowest average personnel costs across the EU can be observed in activities with a high incidence of part-time and seasonal work, such as accommodation and food services (€18 700 per employee) or administrative and support service activities (€25 800 per employee), whereas higher ratios can be seen for professional, scientific and technical activities (€48 100 per employee) or information and communication services (€56 400 per employee).

Note: IS, 2018.

*Source:* Eurostat (online data code: sbs_na_1a_se_r2)




Real estate activities
EU 36.7
80
60
40
20
0
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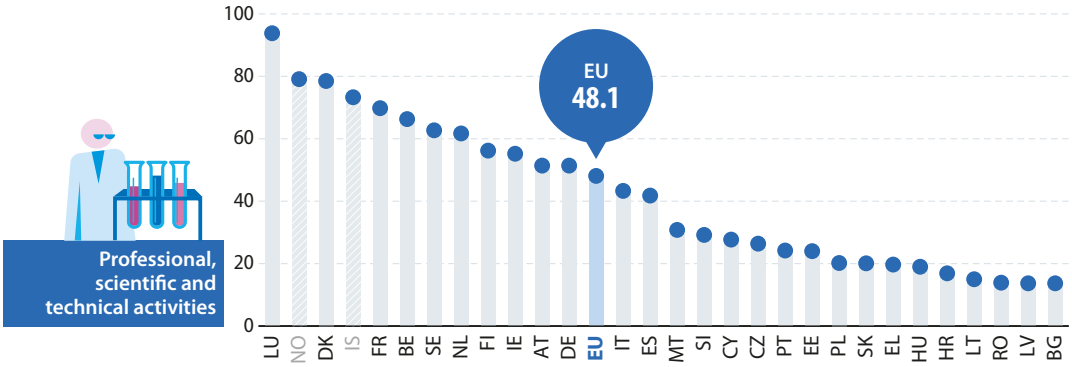
Professional, scientific and technical activities
EU 48.1
100
80
60
40
20
0
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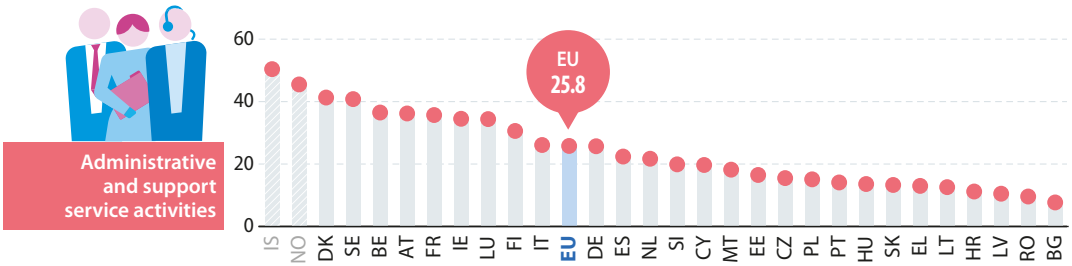
Administrative and support service activities
EU 25.8
60
40
20
0
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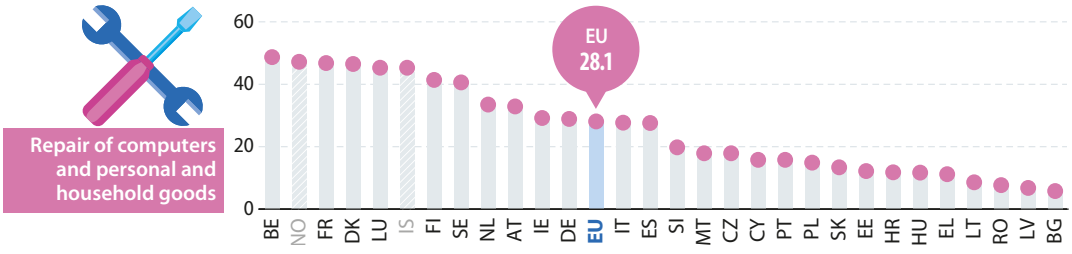
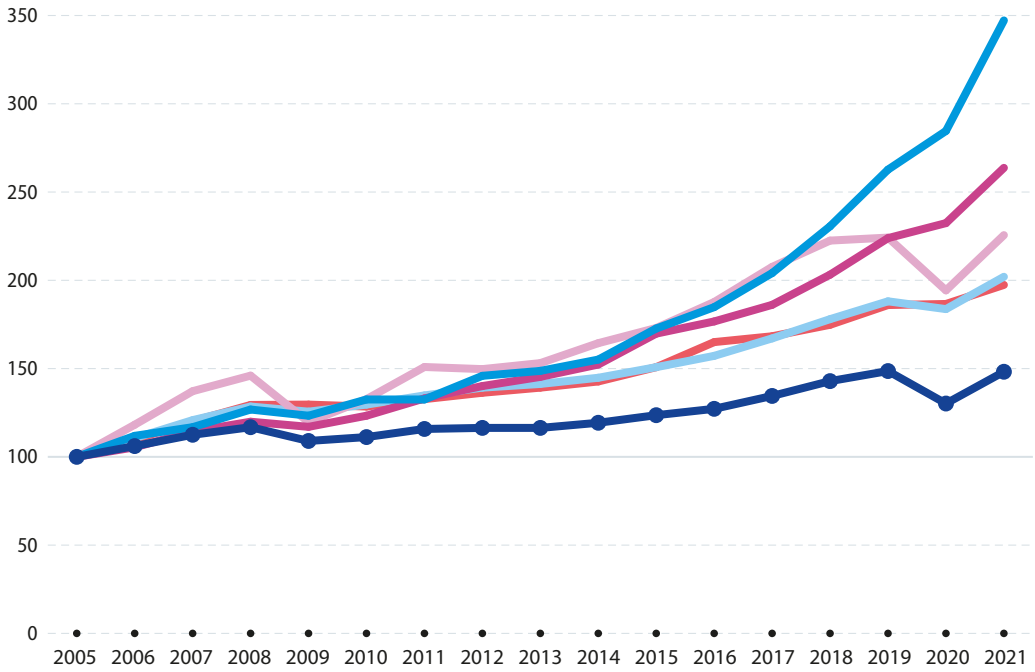

Repair of computers and personal and household goods
EU 28.1
60
40
20
0
BE NO FR DK LU IS FI SE NL AT IE DE EU IT ES SI MT CZ CY PT PL SK EE HR HU EL LT RO LV BG

# Developments

## Turnover index for high-growth non-financial services

(2005 = 100, EU, 2005–2021)




**Non-financial services (excl. distributive trades) – total**

Information service activities

Computer programming, consultancy and related activities

Employment activities

Legal, accounting and management consultancy activities

Security and investigation activities

Note: based on turnover value indices; shows the five non-financial service divisions with the highest rates of change for the EU during the period 2005–2021.

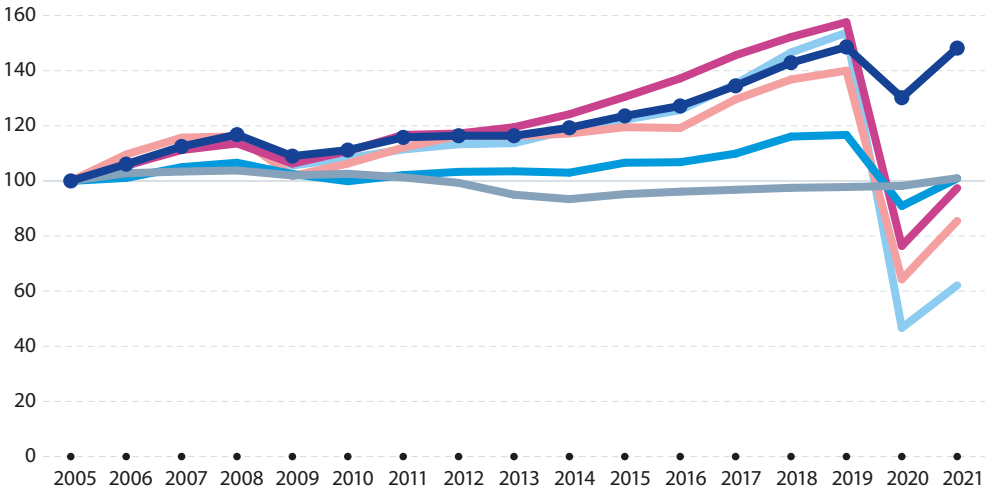
*Source:* Eurostat (online data code: sts_setu_a)

The turnover index illustrates the development of sales in current prices, in other words this index has not been adjusted to remove the effects of price changes. Between 2005 and 2021, the EU turnover index for non-financial services (excluding distributive trades) increased 48 % overall, equivalent to an average of 2.5 % per year. Between 2005 and 2008, the index increased in a fairly regular manner. A fall of 6.7 % was observed in 2009, followed by relatively subdued growth between 2010 and 2016; some of the highest annual rates of turnover growth were recorded between 2017 and 2019 when increases within the range 4.0–6.3 % were recorded. In 2020, the EU turnover index for non-financial services (excluding distributive trades) fell 12.4 %, reflecting the impact of the COVID-19 pandemic, but rebounded 13.9 % the following year.

In turnover terms, the fastest growing non-financial service activity within the EU was information service activities, as sales were 3.5 times as high in 2021 as they had been in 2005, an annual average increase of 8.1 %. Turnover for the related computer programming, consultancy and related activities also increased strongly, 2.6 times as high in 2021 as in 2005. Employment activities more than doubled their turnover, as did legal, accounting and management consultancy activities, while the turnover of publishing activities nearly doubled (up 97 %).

## Turnover index for low-growth non-financial services

(2005 = 100, EU, 2005–2021)




**Non-financial services (excl. distributive trades) – total**

Telecommunications

Audio-visual activities

Accommodation

Air transport

Travel and tour agencies

Note: based on turnover value indices; shows the five non-financial service divisions with the lowest rates of change for the EU during the period 2005–2021.

*Source:* Eurostat (online data code: sts_setu_a)

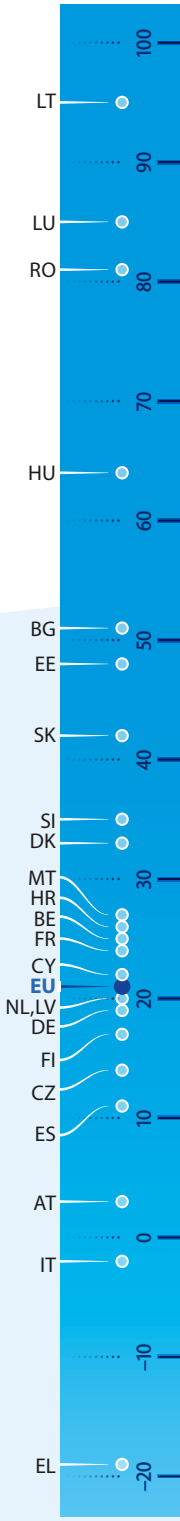
For telecommunications and for motion picture, video and television programme production, sound recording and music publishing activities (hereafter referred to as audio-visual activities) the EU had levels of turnover in 2021 that were marginally above those recorded in 2005 (both up 1 %).

Alongside these two low growth activities, three non-financial service activities within the EU had lower turnover in 2021 than in 2005. Accommodation services recorded growth of 57.6 % between 2005 and 2019, but turnover fell 52 % in 2020 (reflecting the impact of the COVID-19 pandemic) and then increased 28 % in 2021. As a consequence, turnover in this activity in 2021 was 3 % lower than in 2005. Similar situations were observed for air transport and for travel agency, tour operator and other reservation service and related activities (hereafter referred to as travel and tour agencies): both grew between 2005 and 2019, experienced falls in excess of 50 % in 2020 and recorded only a partial recovery in 2021. Turnover was below its 2005 level in both activities, 14 % lower for air transport and 38 % lower for travel and tour agencies.

## Overall change in the non-financial services turnover index

(%, 2015–2021)

Among the EU Member States for which data are available, all except for Italy and Greece reported higher turnover for non-financial services in the latest year (2020 or 2021) than in 2015. Turnover growth was highest in Lithuania as sales were nearly twice as high in 2021 as in 2015 (up 95 %). In Luxembourg, sales were 85 % higher in 2021 than in 2015, while they were 81 % higher in Romania. In Italy, sales were down 2 % between 2015 and 2021, while in Greece a fall of 19 % was observed between 2015 and 2020.



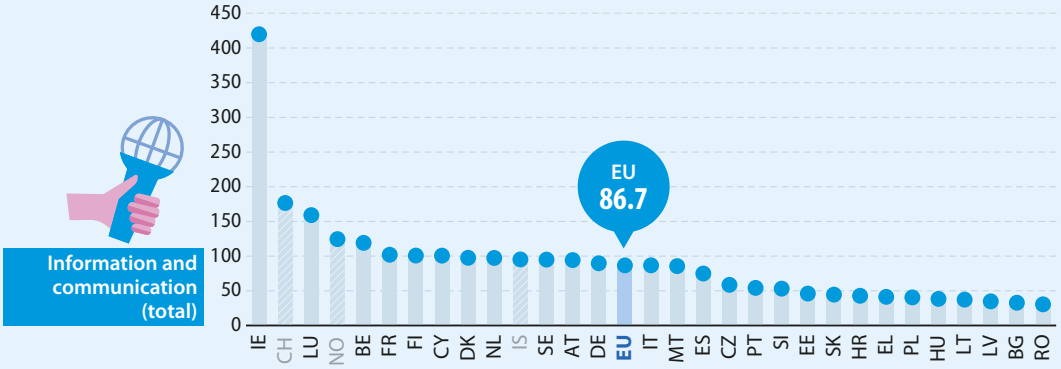

Note: based on turnover value indices. EL: 2015–2020. IE, PL, PT and SE: not available.

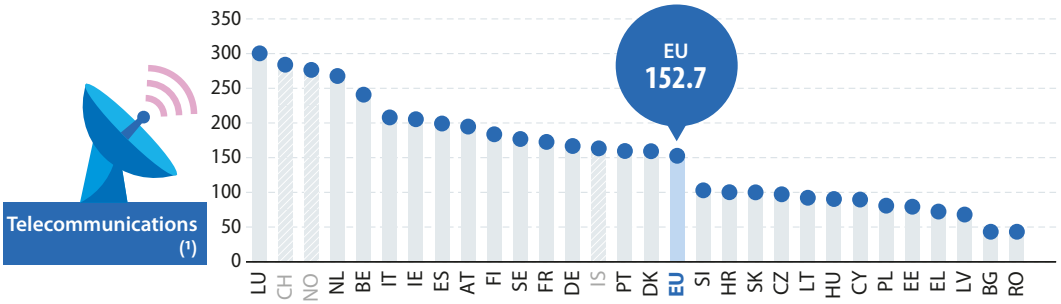
*Source:* Eurostat (online data code: sts_setu_a)

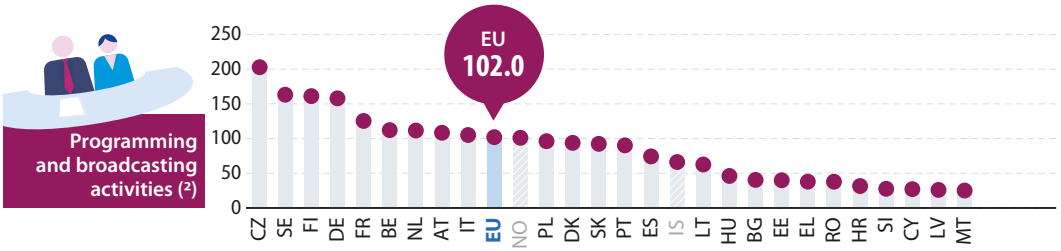
# Focus on information and communication services

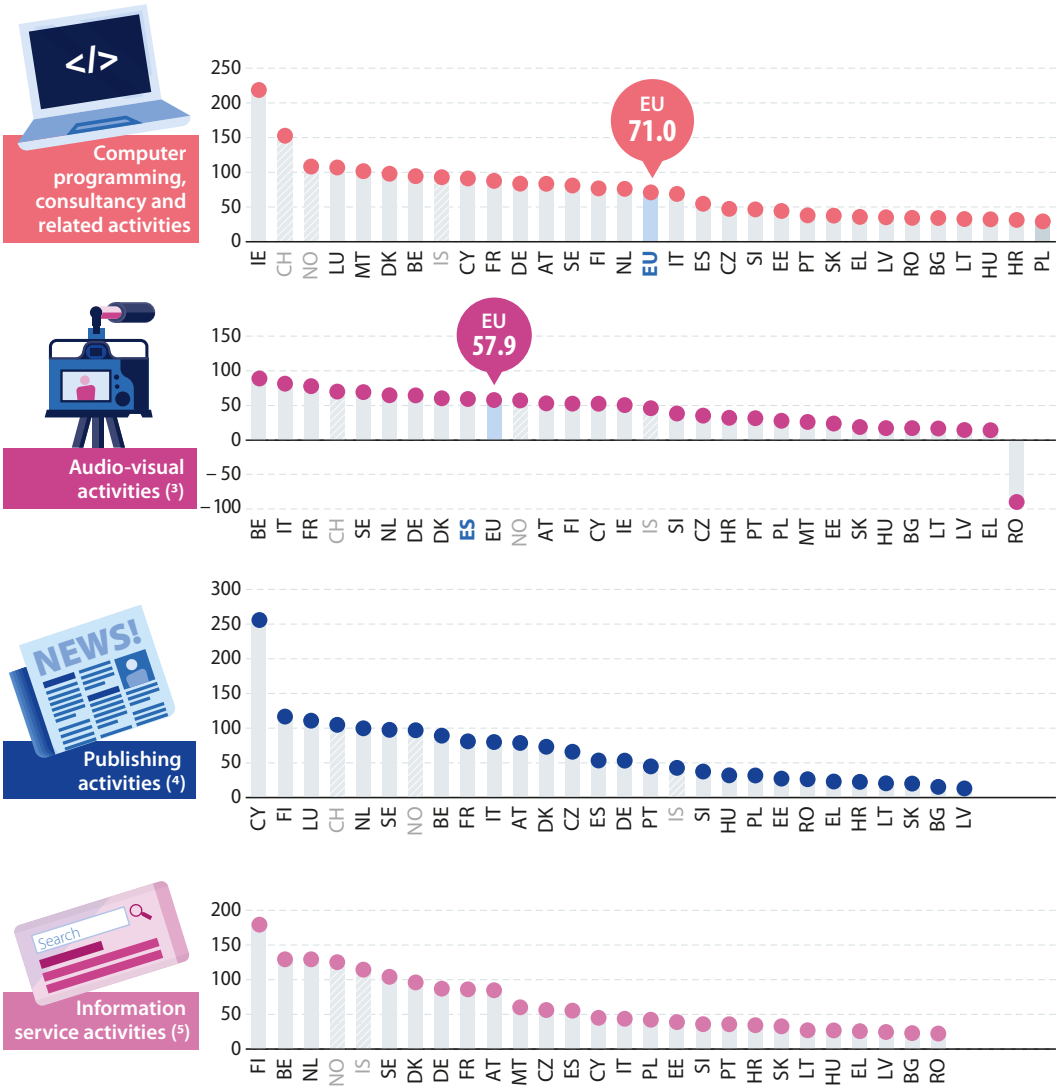
## Apparent labour productivity for information and communication services

(€ thousand per person employed, 2019)






Apparent labour productivity is calculated from value added divided by the number of persons employed. While this ratio is clearly influenced by the value that employed persons add, it is also influenced by the extent of part-time and seasonal work and this may vary between subsectors, between EU Member States and over time.

The EU's information and communication services had the second highest apparent labour productivity of all other non-financial services sections in 2019, lower only than that in the capital-intensive real estate section. At a more detailed level, the highest levels of apparent labour productivity within information and communication services were observed for telecommunications as well as programming and broadcasting activities.

Note: IS, 2018.
(1) MT: not available.
(2) EU: 2018. IE, LU and CH: not available.
(3) LU: not available.
(4) EU, IE and MT: not available.
(5) EU, IE, LU and CH: not available.

*Source:* Eurostat (online data code: sbs_na_1a_se_r2)

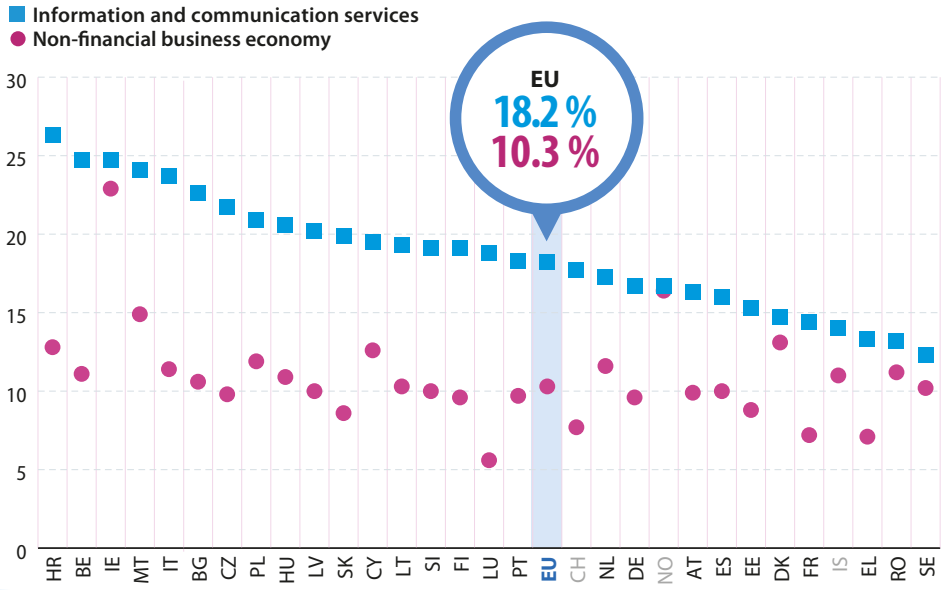
## Gross operating rate for information and communication services

(%, 2019)

The gross operating rate is a measure of profitability and is defined as value added at factor cost minus personnel costs (the gross operating surplus) divided by total turnover. In all EU Member States, information and communication services recorded a gross operating rate in 2019 that was above the non-financial business economy average. Belgium, Croatia and Luxembourg had particularly high rates for information and communication services, around 13–14 percentage points above their non-financial business economy averages. In relative terms, the difference was greatest in Luxembourg, as the gross operating rate for information and communication services was 18.8 %, which was 3.4 times as high as the non-financial business economy average of 5.6 %.

Note: IS, 2018.

*Source:* Eurostat (online data codes: sbs_na_1a_se_r2 and sbs_na_sca_r2)



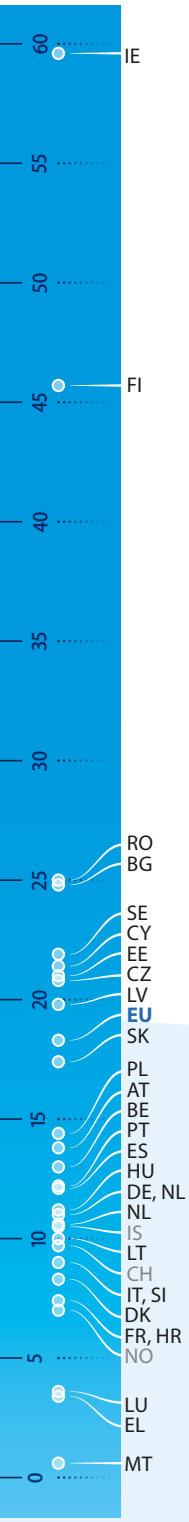

## Exports of telecommunications, computer and information services

(%, share of total exports of services, 2021)

Note: telecommunications, computer and information services form part of the current account for services. The data presented cover total exports of services, in other words, exports to (other) EU Member States and to non-member countries.

*Source:* Eurostat (online data code: bop_its6_det)

Telecommunications, computer and information services represented 18.3 % of all exports of services from the EU to all countries of the world in 2021. Exports of telecommunications, computer, and information services contributed 59.6 % of all services exports from Ireland, by far the highest share among the EU Member States. These services contributed over two fifths of all services exports in Finland and around one quarter in Romania and Bulgaria. By contrast, in Luxembourg and Greece telecommunications, computer, and information services contributed 3.6 % and 3.4 % of all services exports, while in Malta the share was 0.6 %.

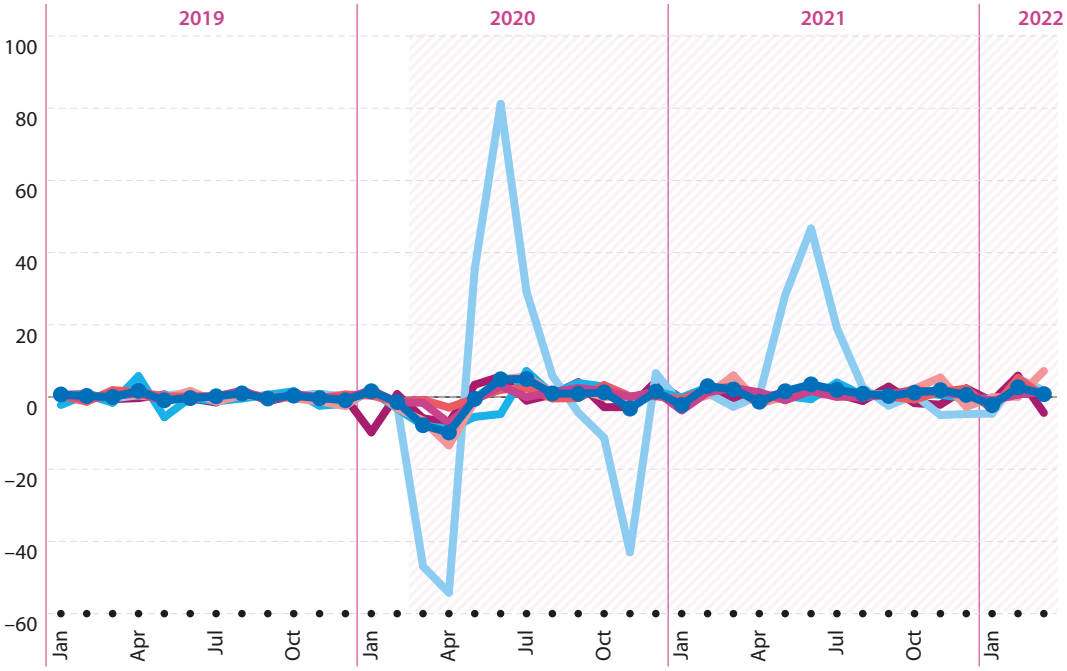


# Latest developments

**Monthly data for 2020 and to a lesser extent 2021 show the impact of the COVID-19 pandemic on services. The most recent data for 2022 may be impacted by a wider range of issues, for example aftereffects of the COVID-19 crisis on supply chains and early impacts from the Russian military aggression against Ukraine and the related sanctions.**

## Non-financial services production indices

(%, change compared with the previous month, EU, January 2019–March 2022)




**Non-financial services (excluding distributive trades) – total**

- Professional, scientific and technical services
- Information and communication
- Transportation and storage
- Administrative and support services
- Accommodation and food services
- Real estate activities

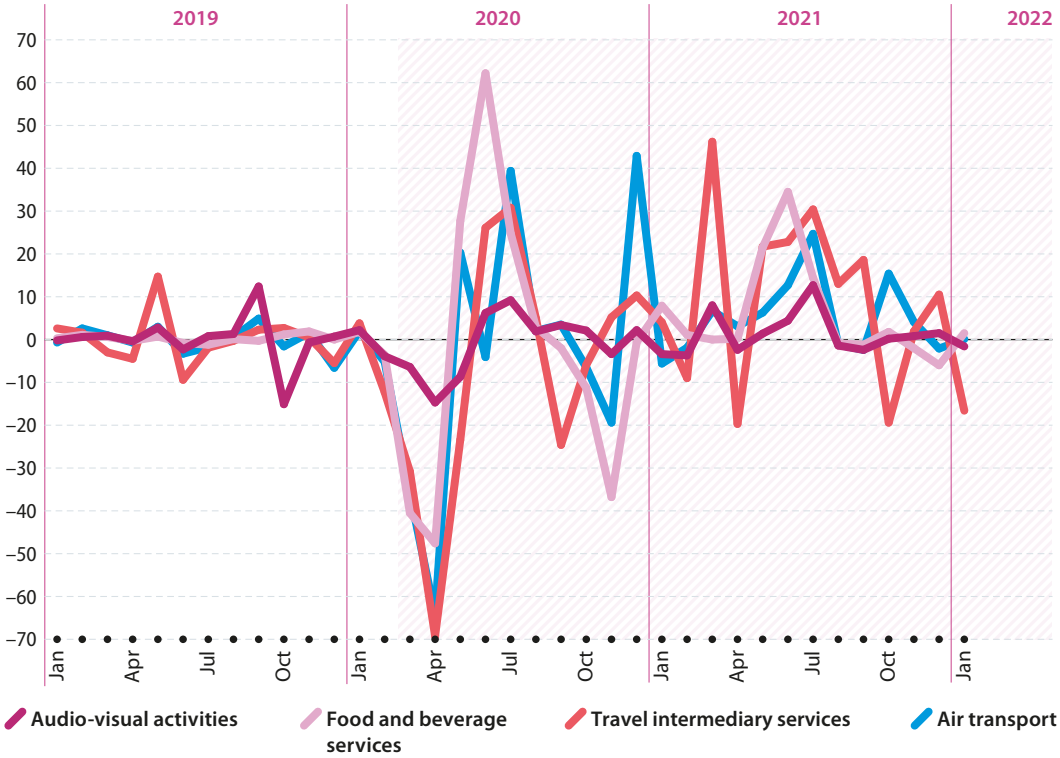
Note: February and March 2022, not available for administrative and support services.

*Source:* Eurostat (online data code: sts_sepr_m)

During the first wave of the pandemic, the main decline in non-financial services (excluding distributive trades) output was in March and April 2020, with a partial recovery in May and June. To assess the initial impact, output in April 2020 can be compared with that in February 2020: the strongest decline across the EU among services sections was recorded for accommodation and food services (output fell 76 %). Despite a strong rebound in May, June and July 2020, by March 2022 the output for accommodation and food services remained 15 % below the level it had been in February 2020.

## Production indices for the five non-financial services divisions most impacted during the COVID-19 pandemic

(%, change compared with the previous month, EU, January 2019–January 2022)




Looking in more detail, namely at non-financial services divisions, several activities experienced a sharp fall in output at the onset of the pandemic. Between February and April 2020, EU production fell 79 % for travel intermediary services, 77 % for air transport services, 69 % for food and beverage services; the next largest fall was 20 % for audio-visual activities. By contrast, the least affected non-financial services during the first wave of the pandemic were: water transport; telecommunications; computer programming, consultancy and related activities; and postal and courier activities.

While there was a partial recovery in late spring / early summer 2020, the picture was mixed, with hospitality and transport services (among others) continuing to face a range of restrictions in some EU Member States. Furthermore, most Member States reintroduced restrictions on hospitality and transport businesses (among others) at various stages during the pandemic.

By January 2022, EU output for travel intermediary services remained 49 % lower than it had been in February 2020, while the output of air transport services was 28 % lower and that of food and beverage services 14 % lower.

Note: the four non-financial services (excluding distributive trades) divisions most impacted by the COVID-19 pandemic were selected on the basis of the change in EU production indices between February and April 2020. Note that the largest fall between February and April 2020 was for accommodation services, but this activity is not shown as the time series is incomplete.

*Source:* Eurostat (online data code: sts_sepr_m)

**For continuously updated visualisation containing time series for services:**

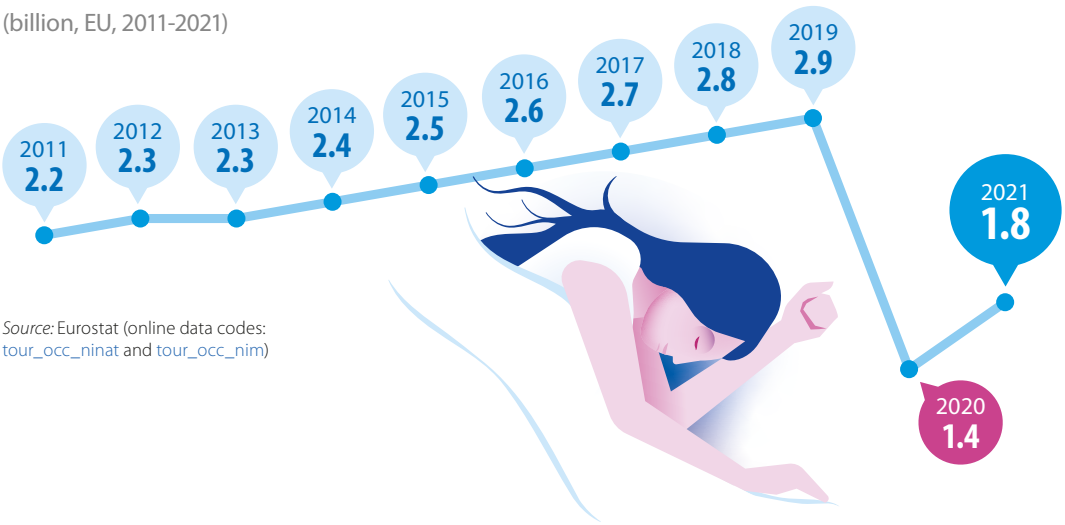
# 7 Tourism

# Structure

**Tourism is travel to a destination away from home for less than one year, for pleasure, business or other personal reason.**

## Nights spent in tourism accomodation

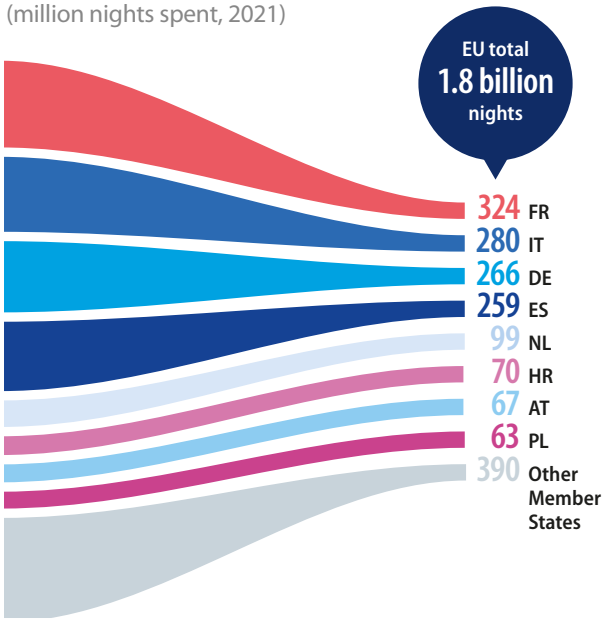
(billion, EU, 2011-2021)




*Source:* Eurostat (online data codes: tour_occ_ninat and tour_occ_nim)

## Number of nights in tourist accommodation

(million nights spent, 2021)




*Source:* Eurostat (online data code: tour_occ_ninat)

Between 2011 and 2019, the number of nights spent in tourist accommodation in the EU increased at an average rate of 3.1 % per year. This sustained period of growth was followed by a sharp contraction (down 50.5 %) in 2020 – as the COVID-19 crisis started – and a partial rebound (up 27.8 %) in 2021.

In 2021, 1.8 billion nights were spent in tourist accommodation in the 27 EU Member States. This overall figure includes nights spent by domestic tourists (those travelling within their country of residence) and inbound international tourists (coming from other Member States or from non-EU countries). The largest markets in the EU were France, Italy, Germany and Spain, each recording 259–324 million nights spent in tourist accommodation.

## Capital city share of nights booked through booking platforms

(%, 2021)

Data on short-stay accommodation rentals are available from Airbnb, Booking, Tripadvisor and Expedia Group. In 2021, 364 million guest nights were spent in the EU in holiday rentals booked through one of these four platforms, well below the 512 million total in 2019, before the onset of the COVID-19 crisis.

In 2021, more than half of the nights spent in accommodation booked through these platforms in Luxembourg, Hungary and Malta were in the capital city. By contrast, this share was below 10.0 % in some of the larger EU Member States (Italy, the Netherlands, France, Germany and Spain) and was just under 3.0 % in Croatia and Cyprus, reflecting the coastal domination of their tourism supply.

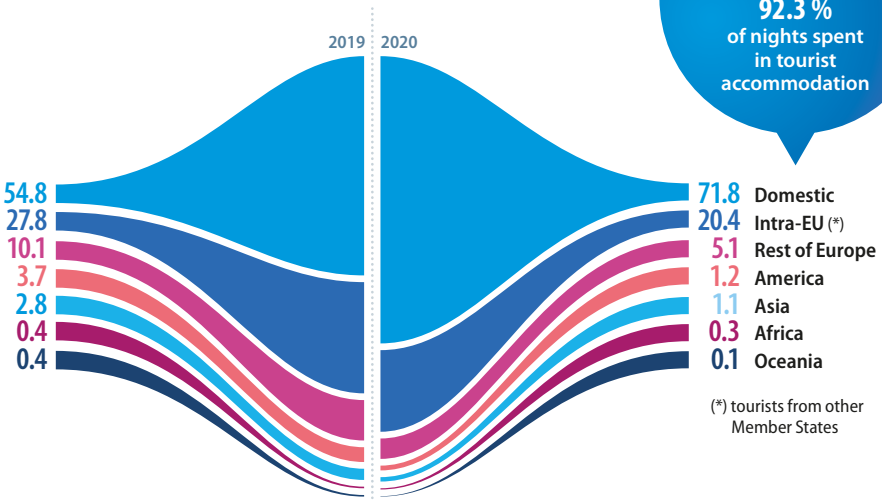
*Experimental statistics on short-stay accommodation offered via online collaborative economy platforms*

*Source:* Eurostat (experimental statistics)


## Nights spent in tourist accommodation according to the residence of tourists

(%, share of all tourist nights, EU, 2019 and 2020)

In 2020 domestic and intra-EU tourists accounted for **92.3 %** of nights spent in tourist accommodation




Domestic tourists accounted for more than two thirds (71.8 %) of nights spent in tourist accommodation across the EU ([1]) in 2020. Tourists from other EU Member States accounted for one fifth (20.4 %) of the total. As such, domestic and international tourists from within the EU accounted for 92.3 % of all nights spent in 2020, with international tourists from non-member countries constituting the remaining 7.7 %. Among the nights spent by tourists from non-member countries, by far the largest origin was the rest of Europe.

Note:excluding IE, EL, CY, LU and SE; the data represent 91 % of the total nights spent in EU tourist accommodation.

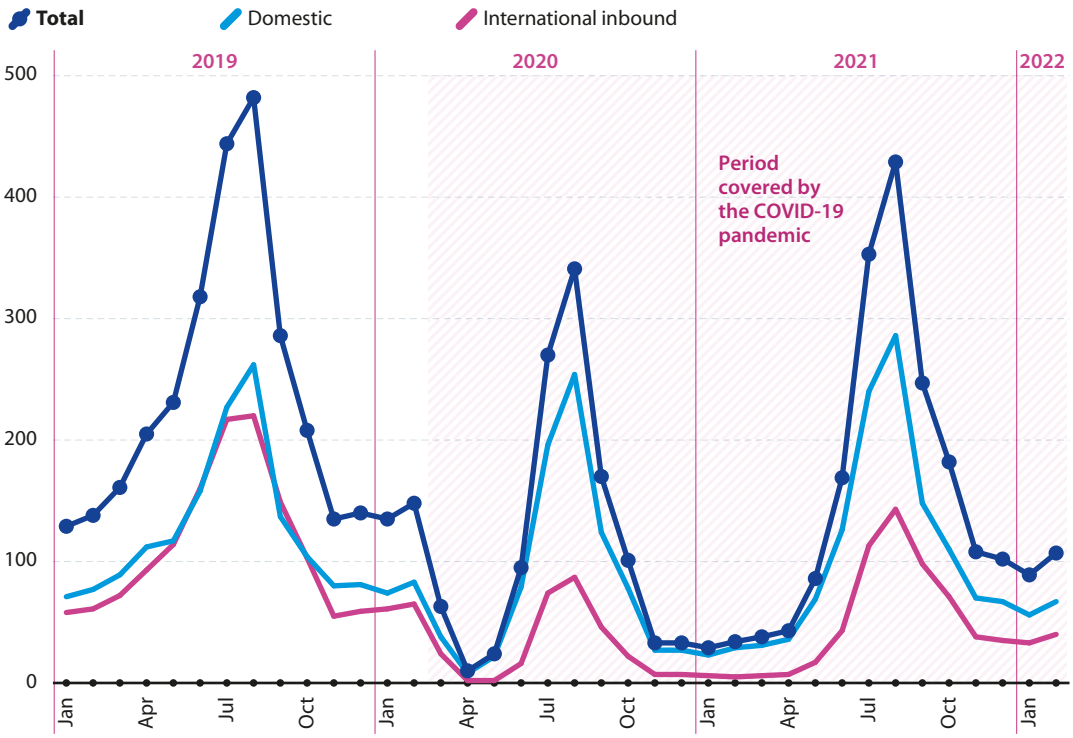
*Source:* Eurostat (ad hoc voluntary data collection)

([1]) These data for the EU are based on data for 22 EU Member States which, collectively, accounted for 91 % of the total nights spent in EU tourist accommodation.

# Seasonality

## Seasonality of nights spent in tourist accommodation

(million nights, EU, January 2019–February 2021)




*Source:* Eurostat (online data code: tour_occ_nim)

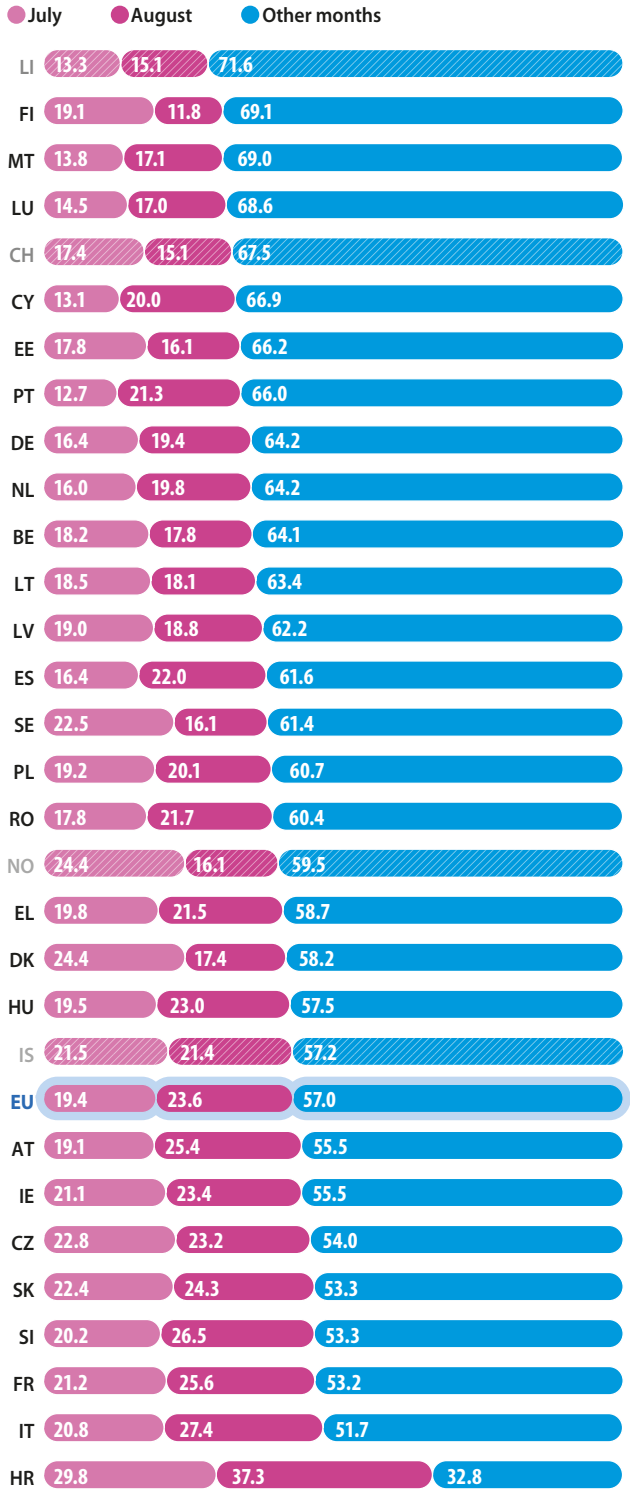
One of the key measures of tourism seasonality is monthly data for nights spent in tourist accommodation. The seasonal patterns for domestic tourists and international tourists were quite similar during 2019, with domestic tourists accounting for 48–59 % of the total nights spent, depending on the month. However, the share of domestic tourists was far higher during 2020 when they accounted for 55 % and 56 % respectively in January and February, before the COVID-19 outbreak, while for the remaining months this share ranged between 61% and 90 % of the total nights spent in EU tourist accommodation. The lower level of demand from international tourists likely reflects increased uncertainty during the COVID-19 pandemic, with this group primarily affected by cancelled transport services and/or travel restrictions.

In each month of 2021, the share of domestic tourists remained above that observed for each month of 2019, ranging from 60 % to 84 %. For each month from April 2021, the share of domestic tourists was lower than that observed for the same month in 2020.

## Nights spent in tourist accommodation in July and August

(%, share of annual nights spent, 2021)

Tourism demand (represented here by the number of nights spent in tourist accommodation) in some EU Member States is particularly concentrated in the summer months of July and August. This pattern was particularly notable in Croatia where more than two thirds of all the nights spent in tourist accommodation in 2021 were recorded in these two months. By contrast, while it does have a summer bias, Malta is a year-round destination with demand spread more evenly across the calendar.




Note: EE, IE, CY, IS and CH, 2020. EL and FR: 2019.
BG: not available.

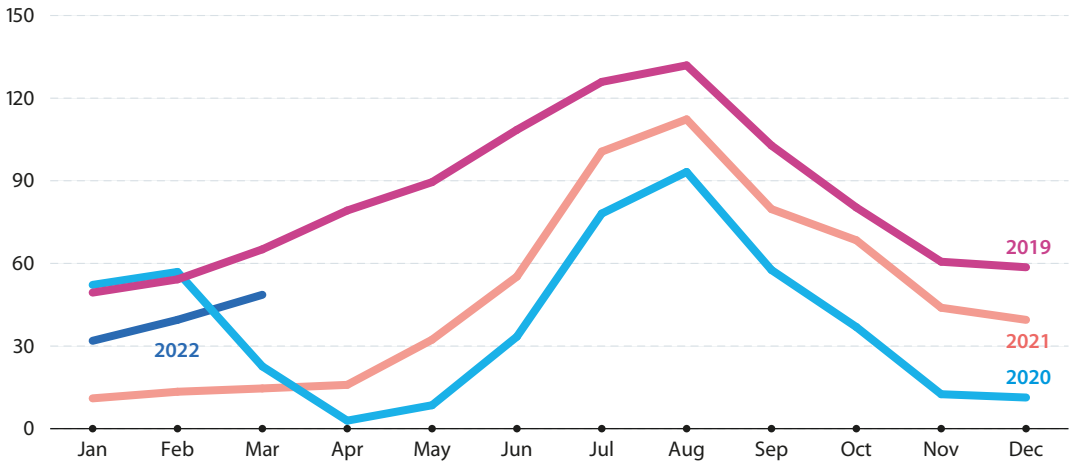
*Source:* Eurostat (online data code: tour_occ_nim)

# Latest developments

**Monthly data for 2020 and to a lesser extent 2021 show the impact of the COVID-19 pandemic on tourism. The most recent data for 2022 may be impacted by a wider range of issues, for example early impacts from the Russian military aggression against Ukraine and the related sanctions.**

## Arrivals in tourist accommodation

(million arrivals, EU, January 2019–March 2022)




*Source:* Eurostat (online data code: tour_occ_arm)

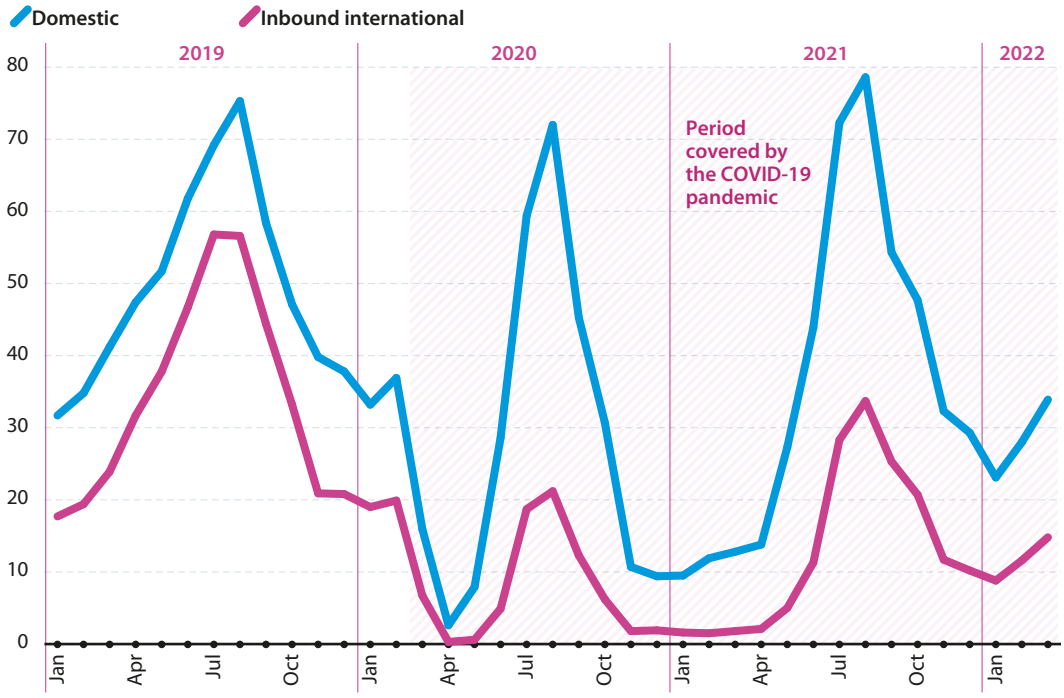
While the number of tourist accommodation arrivals in the EU in January and February 2020 was in line with those for January and February 2019, the pandemic and related measures led to a considerable decrease in March and April 2020. This was followed by a modest increase in the number of arrivals in May, while the number accelerated – but did not fully recover – in the early summer of 2020. Throughout the rest of the summer and into autumn, the developments were similar in 2020 to those in 2019, but with around 39–48 million fewer arrivals each month from July to December 2020 than during the equivalent months in 2019; in relative terms, these lower numbers were equivalent to falls of 29–81 %.

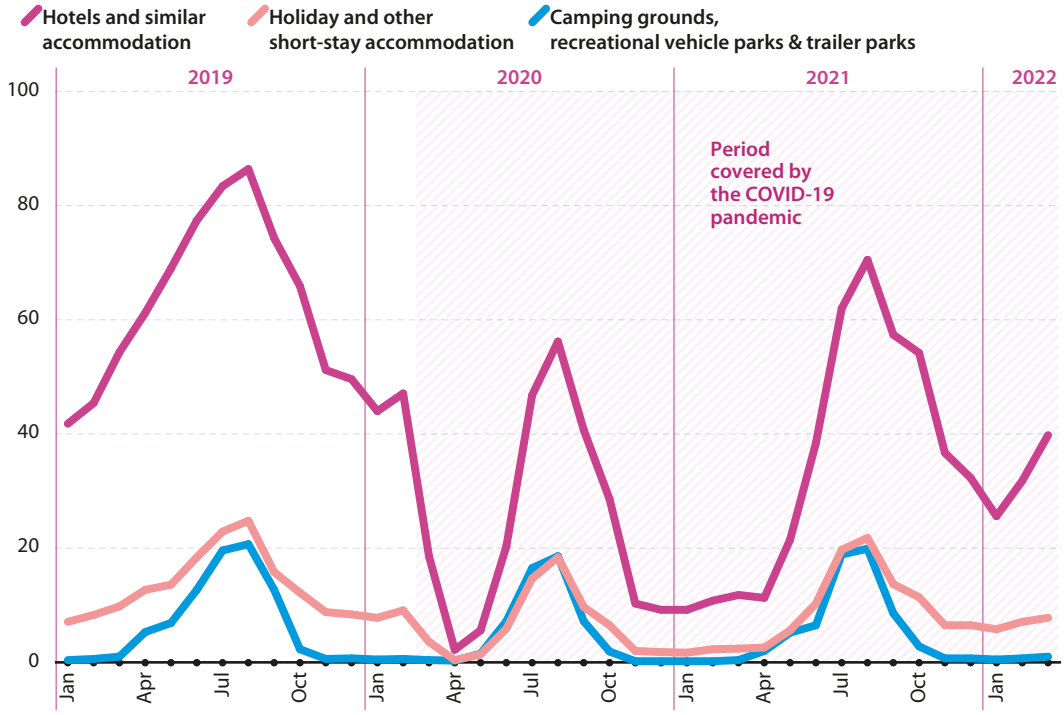
The situation observed in the second half of 2020 continued into the first half of 2021, with 38–63 million fewer arrivals in tourist accommodation in the EU each month from January to June 2021 than during the equivalent months in 2019. Thereafter the number of arrivals increased greatly. Nevertheless, from July to December 2021 there were 12–25 million fewer arrivals each month than during the equivalent months in 2019.

Comparing 2021 directly with 2020 (leaving aside the pre-pandemic months of January and February 2020 and the transition month of March 2020), there were more arrivals in every month of 2021 than the equivalent month of 2020. For example, from May to December 2021, there were at least 19 million more arrivals each month than there were in each equivalent month of 2020. This recovery continued into the first three months of 2022, with more arrivals in January, February and March 2022 than a year earlier.

## Arrivals in tourist accommodation

(million arrivals, EU, January 2019–March 2022)




*Source:* Eurostat (online data code: tour_occ_arm)


The number of international arrivals at EU tourist accommodation was 88 % lower in March and April 2020 (combined) than a year earlier, while for domestic arrivals there was a fall of 79 %. When studied by type of accommodation, arrivals at hotels and similar accommodation and at holiday and other short-stay accommodation were down 82 % during the same period, with a larger fall (down 90 %) for camping grounds, recreational vehicle parks and trailer parks.

The partial recovery in the number of arrivals at tourist accommodation during the summer of 2020 was largely driven by domestic demand, with many people deciding to stay in their home country for a 'staycation' rather than crossing borders for a foreign holiday. Based on a comparison with July and August 2019, domestic arrivals at EU tourist accommodation were down 9 % in July and August 2020, while the decrease for inbound international arrivals was considerably greater, at 65 %. The most affected type of accommodation was hotels and similar accommodation, as the number of arrivals in July and August 2020 was 39 % lower than in the same months of 2019. The number of arrivals in EU holiday and other short-stay accommodation was 31 % lower in July and August 2020 than in July and August 2019, while the smallest impact from the pandemic was felt by camping grounds, recreational vehicle parks and trailer parks (down 13 %).

Comparing the combined July and August figures for 2021 with those for 2020, inbound international arrivals increased 55 % compared with a 15 % increase for domestic arrivals. Concerning the type of accommodation, the largest increases were for hotels and similar accommodation (up 29 %) and holiday and other short-stay accommodation (up 25 %); the increase observed for camping grounds, recreational vehicle parks and trailer parks was 11 %.

Compared with 2019, in other words before the pandemic, the combined July and August figures for 2021 were down 45 % for inbound international arrivals but up 4 % for domestic arrivals. Concerning the type of accommodation, the largest decreases were still for hotels and similar accommodation (down 22 %) and holiday and other short-stay accommodation (down 13 %); the decrease observed for camping grounds, recreational vehicle parks and trailer parks was 4 %.

**Read more in the continuously updated article on tourism:**

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Print: KS-06-22-075-EN-C
PDF: KS-06-22-075-EN-N

# Key figures on European business

*Key figures on European business* presents a selection of key business statistics indicators for the European Union (EU) and its individual Member States, as well as the EFTA countries. This publication may be viewed as an introduction to European business statistics and provides a starting point for those who wish to explore the wide range of data that are freely available on Eurostat's website at https://ec.europa.eu/eurostat together with a range of online articles in *Statistics Explained*.

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