

COMMENT

Sales from industrial activity at constant prices (of the year 2000) in November 2007 rose by 7.6% (+8.6% at current prices), by 5.9% WDA, or by 6.7% SA, year-on-year. The increase of sales from industrial activity was most contributed to by 'manufacture of transport equipment' (+21.1%, contribution to the growth of industry in total 4.4 percentage points), 'manufacture of electrical and optical equipment' (+11.4%, contribution 2.1 p.p.) and 'manufacture of machinery and equipment' (+11.8%, contribution 1.0 p.p.). Sales from industrial activity decreased in 'manufacture of coke, refined petroleum products' (-37.5%, contribution -0.8 p.p.), for 'manufacture of chemicals, chemical products and man-made fibres' (-8.1%, contribution -0.4 p.p.) and 'manufacture of food products; beverages and tobacco' (-3.1%, contribution -0.2 p.p.).

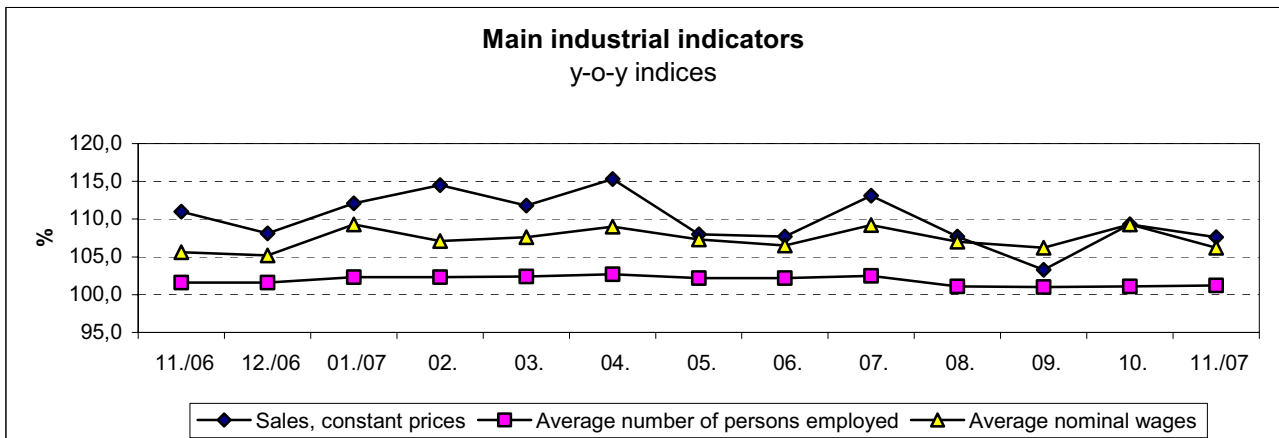
Direct export sales of industrial enterprises increased by 11.0% at constant prices (+10.2% at current prices), and their proportion in total sales of industrial enterprises stood at 50.2% (at current prices).

Sales from industrial activity of foreign-controlled enterprises were 10.4% up at constant prices (+10.6% at current prices), and their contribution to total sales made 60.5% (current prices). Direct export sales of industrial foreign-controlled enterprises increased by 11.9% at constant prices (+11.1% at current prices) and made up 76.7% of total sales of these enterprises (current prices).

The **average number of persons employed*** in the industry went up by 1.2% in November 2007 (+14.1 thousand persons), year-on-year. Employment in the industry has been on the increase since October 2005, i.e. for 26 months. Increases were registered in 'manufacture of rubber and plastic products' (+7.9%), 'manufacture of transport equipment' (+5.8%) and 'manufacture of machinery and equipment' (+4.6%). Employment decreased most in 'manufacture of leather and leather products' (-9.4%), 'manufacture of textiles and textile products' (-8.9%), and 'mining and quarrying except energy producing materials' (-6.1%).

The **average monthly nominal wage** in industry rose by 6.2%, year-on-year, and in November amounted to CZK 24,362. The average hourly wage increased by 4.9% and stood at CZK 160.2. Labour productivity of industry (sales per employee) rose by 5.5% and hourly labour productivity by 5.0%.

Graph 4



Industrial new orders in selected CZ-NACE activities concluded in November 2007 reached the value of CZK 164.7 billion (current prices), of which non-domestic industrial new orders made up CZK 105.7 billion. The y-o-y index of industrial new orders in total stood at 104.0%, the index of non-domestic industrial new orders was 103.3%. Non-domestic industrial new orders grew most in 'manufacture of motor vehicles, trailers and semi-trailers' (+10.2%, contribution to the growth of industry in total 3.0 percentage points), 'manufacture of machinery and equipment' (+11.1%, contribution 1.6 p.p.) and manufacture of electrical machinery and apparatus (+14.2%, contribution 1.4 p.p.). Non-domestic industrial new orders dropped in 'manufacture of the radio, television and communication equipment and apparatus' (-24.1%, contribution -2.2 percentage points), 'manufacture of office machinery and computers' (-21.1%, contribution -1.3 percentage points) and 'manufacture of basic metals' (-7.6%, contribution -0.7 p.p.).

**) Starting from January 2007, in accordance with Eurostat methodology, monthly data on numbers of employed persons are published by the Czech Statistical Office as part of the short-term industrial statistics. Unlike the average registered number of employees published before, the new indicator includes also persons working under agreement for work performed outside the employment relationship and other employed persons who participate in work for the company without having an employment relationship with the company. The new figure represents full-time equivalent (FTE). This change has an impact on average wage and labour productivity calculations. The last mentioned indicator considers, in addition, the number of agency workers not included in the number of persons employed. Year-on-year comparability of the data published is ensured.*