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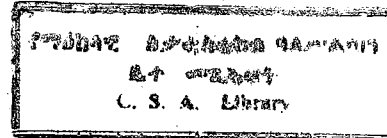
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**THE FEDERAL DEMOCRATIC REPUBLIC OF ETHIOPIA
CENTRAL STATISTICAL AUTHORITY**

**REPORT ON LARGE AND MEDIUM SCALE
MANUFACTURING AND ELECTRICITY
INDUSTRIES SURVEY**

MAY 2000



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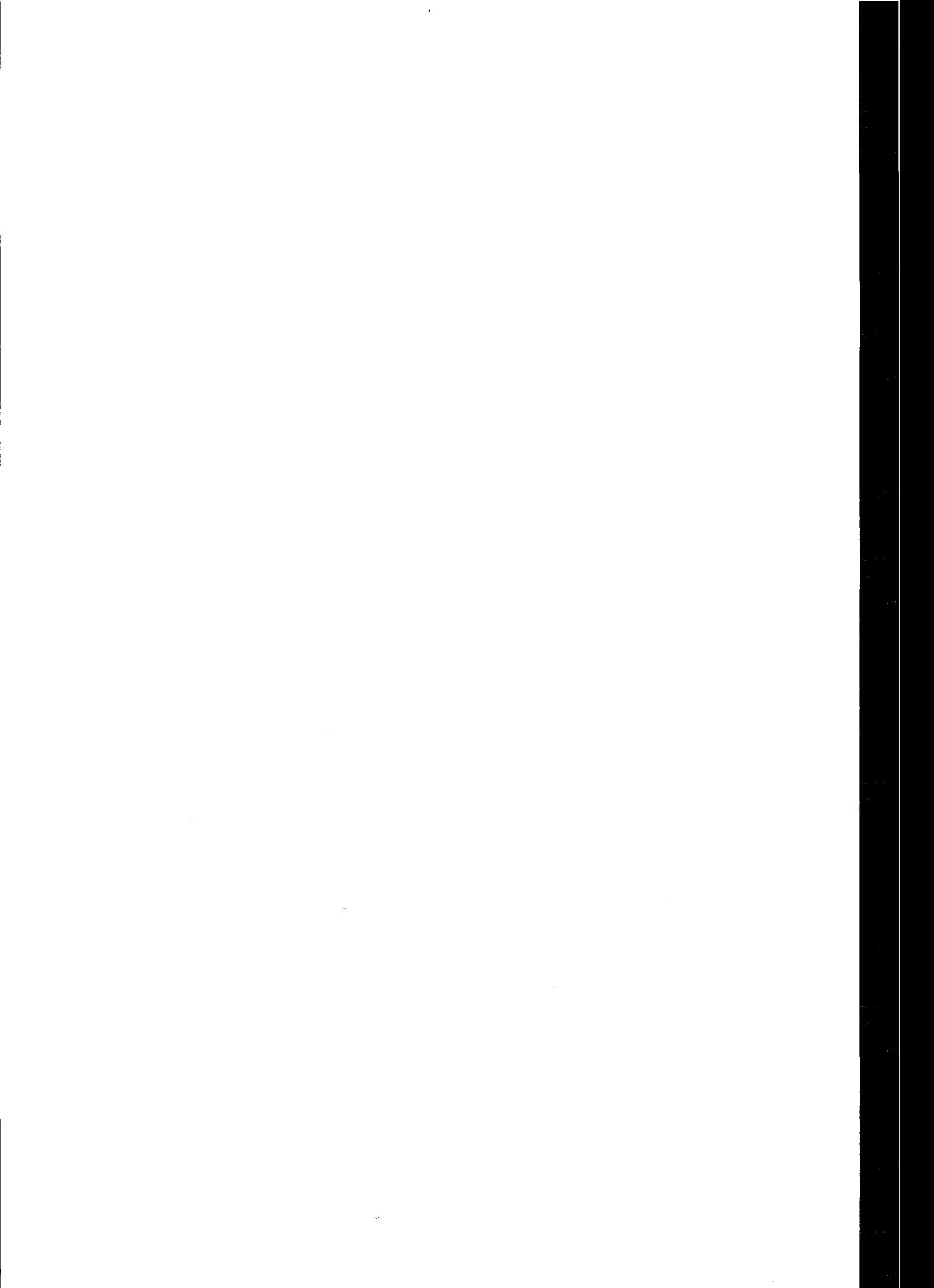
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ABBREVIATIONS

CSA	- Central Statistical Authority
E.F.Y.	- Ethiopian Fiscal Year
G.C.	- Gregorian Calendar Year
S.N.N.P.	- Southern Nations, Nationalities and Peoples' Region
N.E.C.	- Not Elsewhere Classified
S.N.A.	- System of National Accounts
IMPS	- Integrated Micro-Computer Processing System
KW	- Kilowatt
KWH	- Kilowatt Hour



PART I

INTRODUCTION AND OBJECTIVES OF THE SURVEY

1. Introduction

The presence of adequate and current statistical data in various economic sectors that are considered essential for development planning, socio-economic policy formulation and economic analysis is vital in promoting the economic development of a country. Based on this general objective, the Central Statistical Authority (CSA) has been conducting surveys of various economic activities of which the annual Large and Medium Scale Manufacturing Industries survey is one.

Manufacturing is defined here according to International Standard Industrial Classification (ISIC Revision-3) as “the physical or chemical transformation of materials or components into new products, whether the work is performed by power-driven machines or by hand, whether it is done in a factory or in the worker’s home, and whether the products are sold at wholesale or retail. The assembly of the component parts of manufactured products is also considered as manufacturing activities.”

Central Statistical Authority (CSA) has been publishing results of the survey of Manufacturing and Electricity Industries on annual basis since 1968 E.C. to provide users with reliable, comprehensive and timely statistical data on these sectors. In this respect, this survey is the principal source of industrial statistics on Large and Medium Scale Manufacturing establishments in the country. The data are obtained by conducting Large and Medium Scale Manufacturing survey each year..

This publication presents the objectives, scope and coverage, training of field staff, methods of data collection and field organization, basic concepts and definitions, summary of selected survey results and structure and performance of Large and Medium Scale Manufacturing and Electricity Industries. Accordingly, the bulletin has six parts:- Part I deals with an introduction and objective of the survey. Part II gives an overview about the survey methodology, data collection and processing. Part III presents summary of selected survey results on Large and Medium Scale Manufacturing industries. Part IV deals with the results of Large and Medium Scale Manufacturing establishments for the year 1998/99 (1991 E.F.Y.) . Part V deals with the time series data and various ratios for the period of five years i.e. 1994/95-1998/99 (1987-1991 E.F.Y.) for Large and Medium Scale Manufacturing Industries. Finally Part VI presents the activity and performance of the Electricity Industry which also refers to the five years period, i.e. 1994/95-1998/99 (1987-1991 E.F.Y.). Furthermore, the survey questionnaire for Large and Medium Scale Manufacturing Industries is attached as an appendix.

2. Objectives of the survey

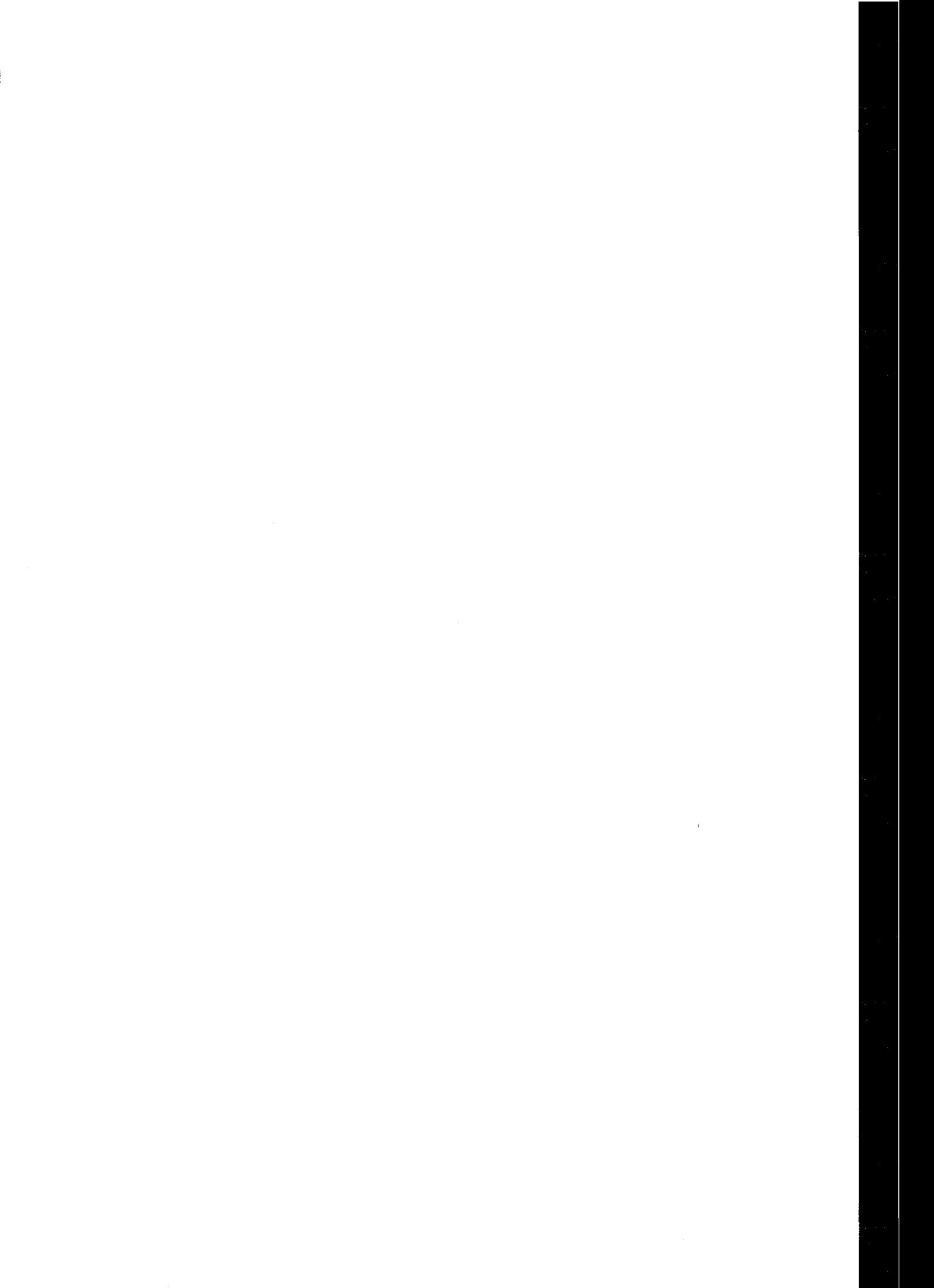
The main objectives of the annual survey of Large and Medium Scale Manufacturing and Electricity Industries are to :-

- a. obtain basic statistical data that are essential for policy makers, planners and researchers by industrial group.
- b. collect basic quantitative information on employment, volume of production and raw materials, structure and performance of the country's Large and Medium Scale Manufacturing and Electricity Industries.
- c. compile statistical data which will be an input to the System of

National Accounts (SNA), on Large and Medium Scale

Manufacturing and Electricity establishments as a whole and by industrial group.

- d. obtain the number of proprietors engaged in these sectors and find out the major problems that creates stumbling block for their activities. The identification of the problems are required for planning and executing any type of government intervention program.



PART II

**SURVEY METHODOLOGY, DATA COLLECTION AND
PROCESSING**

1. Scope and Coverage

The scope of the Large and Medium Scale Manufacturing survey is confined to those establishments which engage 10 persons and above and use power-driven machines and covers both public and private industries in all Regions of the country, where establishments under the scope of the survey are found. With regard to Electricity data, the survey covered only the electricity supplied by the Ethiopian Electric Power Corporation. In other words the negligible electric power services supplied by the other sources are not included in the survey.

Like the previous years, in the current survey an attempt was made to update the directory using as source of information the licenses issued by the Ministry of Trade and Industry and corresponding bureaux of the Regional States of the country for the large public sector industries and for the private establishments including co-operatives. Furthermore, due to various efforts made to include all the establishments under the scope of the survey, in this reference year the number of establishments covered by the survey increased by 17 than that of the previous survey period.

In this publication detailed information on number of establishments, number of persons engaged and number of employees, wages and salaries paid by industrial group, sex, nationality and occupation, initial capital, gross value of production, industrial and non-industrial costs, value added, operating surplus, quantity of production and raw materials, fixed assets, investment and capacity are presented.

2. Basic Concepts and Definitions:-

- (i) An Establishment:- is defined as the whole of the premises under the same ownership or management at a particular address. (e.g. a bakery, a sawmill, ...etc.).
- (ii) Paid-up Capital:- is that part of the issued capital of an establishment that has been paid by the shareholders or the individual owner.
- (iii) Working Proprietors, Active Partners and Family Workers:- include all unpaid working proprietors, active partners and members of their household who actively participate in the operation of the establishment.
- (iv) Administrative and Technical Employees:- include salaried directors and managers, technicians, superintendents, research workers, draftsmen and designers, engineers, chemists, architects, accountants, book-keepers, office machine operators, receptionists, sales men, delivery personnel, guards and other office staff.
- (v) Production Workers:- include workers directly engaged in production i.e., persons engaged in fabricating, processing, assembling, maintenance, repair, janitorial, record keeping and other associated activities.
- (vi) Seasonal and Temporary Workers:- include workers who are employed for a whole or a part of the year. These workers are not regularly on the payroll of the establishment.
- (vii) Number Employed:- includes all persons on the payroll whether seasonal or temporary workers. The number of seasonal and temporary workers has been adjusted to give equivalent of full-time workers.

- (viii) **Number Engaged**:- includes paid employees and working proprietors, active partners, and unpaid family workers.
- (ix) **Basic Wages and Salaries**:- includes all payments in cash made to employees during the reference year. It excludes commissions, bonuses, professional and hardship allowances.
- (x) **Wages and Salaries**:- includes all payments in cash or in kind made to employees during the reference year in connection with work done for the establishments.
- (xi) **Commissions, Bonuses, Professional and Hardship Allowances**:- refer to the total of commissions, bonuses and cost of living allowances paid in cash to employees. This excludes car allowance and per diem.
- (xii) **Supplements to Wages and Salaries of Employees**:- represents payments made by the employer on behalf of his employees. Included are employers' contribution to social security systems, insurance premiums, ...etc. Only payments made by the employer are included here.
- (xiii) **Revenue from Sales**:- represents the total sales value of all products and by-products during the reference year valued at market price.
- (xiv) **Receipt from Industrial Services Rendered to Others**:- include all contract, repair and maintenance work done to others on raw materials and spareparts supplied by the customer.
- (xv) **Receipt of Products Bought and Resold**:- is the value including taxes of all goods resold including during the reference year without any transformation or processing.

(xvi) **Other Receipts**:- include rental income from lease of machinery and equipment, income from sales of scrap, the value of fixed assets produced by the unit for its own use and other income.

(xvii) **Difference of Stocks in the Value of Finished Goods and Semi-Finished Goods**:- is the net change between the end and the beginning of the reference period in the value of finished and semi-finished goods.

(xviii) **Gross Value of Production**:- includes the sales value of all products of the establishment, the net change between the beginning and end of the reference period in the value of finished goods and the value of work in-progress, the value of industrial services rendered to others, the value of goods bought and resold without any transformation or processing, and other receipts. The valuation of Gross Value of Production is in terms of producers' values where indirect taxes are included in the value of sales of the establishment and the value of subsidies received is excluded.

(xix) **Raw Materials**:- include all raw and auxiliary materials, parts and containers which are consumed during the reference year. The value of local raw materials is the value of locally produced raw materials and is the cost at the factory which includes the purchase price, transport charges, taxes and other incidental costs. The value of imported raw materials is the value of raw materials produced in other countries and obtained directly or from local source and is the cost at the factory which includes the purchase price, transport charges, taxes and other incidental costs.

(xx) **Other Industrial Services Rendered by Others**:- refer to contract, repair and maintenance work done by others in the reference year on materials controlled by the establishment. Included are also the cost of all goods

purchased and resold without any transformation during the reference year and the cost of water consumed.

(xxi) **Industrial Cost**:- Includes the cost of raw materials, fuels, and other supplies consumed, cost of industrial services rendered by others, cost of goods bought and resold without any transformation or processing and cost of electricity consumed.

(xxii) **Non-industrial Cost**:- includes payments like professional fees, postage, telephone, insurance, advertising, hired transport, rental payments, etc. (depreciation is excluded).

(xxiii) **Census Value Added (at Market Price)**:- is the difference between Gross Value of Production and Industrial Cost. Census Value Added at market price minus indirect taxes net (i.e., indirect taxes less subsidies) gives census value added at factor cost.

(xxiv) **Value Added in the National Account Concept (at Market Price)**:- is defined as the difference between the gross value of production and industrial and non-industrial costs. To get the same indicator at factor cost indirect taxes net (i.e., indirect taxes less subsidies) are subtracted.

(xxv) **Fixed Capital Assets**:- are those with a productive life of one year or more which are intended for the use of the establishment including fixed assets made by the establishment's own labour force for its own use. They are valued in this report at book-value end of the reference year, that is the net book value at the beginning plus new capital expenditure minus those sold and disposed and depreciation during the reference year.

(xxvi) **New Capital Expenditure**:- is the cost of new or used capital equipment

bought during the reference period.

(xxvii) **Operating Surplus**:- is defined here as the difference between value added in the national account concept at factor cost and total wages and salaries.

(xxviii) **Public Sector**:- under this sector are included all establishments owned by the state i.e., those which were fully as well as partially (with 51 percent share and above) owned by the Government.

(xxix) **Private Sector**:- includes establishments such as individual ownership, partnership, private limited company, share company, co-operatives and others.

(xxx) **Intermediate Cost (for electricity industry)**:- includes cost of materials, fuel, and other costs such as, transport, repair and maintenance and insurance paid, etc.

(xxxi) **Capacity**:- capability of the installed generators and diesel engines to produce electrical energy.

(xxxii) **Tariff**:- fixed rate of payment where consumers are classified according to their consumption behavior.

(xxxiii) **Domestic Tariff**:- this tariff is intended for domestic consumers in private residences. The tariff does not include supply for purpose of any business of commercial activity or professional or for communal services.

(xxxiv) **Street Lighting Tariff**:- applies only for street lighting consumption.

(xxxv) **Commercial Tariff**:- applies to electricity supplied to commercial and/or office premises, irrespective of the level of consumption.

(xxxvi) **Industrial Tariff**:- applies to industrial consumers generally using electricity for manufacturing or processing purposes or for purposes as may be specified by the Authority.

(xxxvii) **Agricultural Tariff** :- applies to electricity consumed by agricultural service.

(xxxviii) **Number of Reporting Establishments** :- is the number of establishments for which the required breakdown for data inquired is available either from the survey or from estimates.

3. Training of Field Staff

In the Large and Medium Scale Manufacturing Industries survey, after updating the directory, questionnaires and instruction manuals and all relevant materials were prepared and printed in advance. Then, the training of all field staff were carried out for six days at the head office. In this training, the Central Statistical Authority's branch statistical office assistant heads, statisticians from the head office, field supervisors, and enumerators were involved.

The training which was expected to ensure the quality of the data consisted of class room discussions, filling - in questionnaires by trainees for practice using financial statements of selected establishments. The filled-in questionnaires by the trainees were checked and corrections were made and the errors were pointed out to the trainees, so that these wouldn't be repeated during the actual data collection.