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

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

NOVEMBER 2004

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**ADDIS ABABA
NOVEMBER 2004**

321- STATISTICAL BULLETIN - 321

**PREPARED AND PRINTED BY
CENTRAL STATISTICAL AUTHORITY
P.O. BOX 1143 ADDIS ABABA
Tel. 55-30-11**

CONTENTS

	<u>PAGE NO.</u>
LIST OF TABLES.....	II
LIST OF FIGURES.....	IX
ABBREVIATIONS.....	IX
PART I INTRODUCTION AND OBJECTIVES OF THE SURVEY	
1. INTRODUCTION.....	1
2. OBJECTIVES OF THE SURVEY.....	2
PART II SURVEY METHODOLOGY, DATA COLLECTION AND PROCESSING	
1. SCOPE, COVERAGE AND CONTENT.....	3
2. BASIC CONCEPTS AND DEFINITIONS.....	4
3. TRAINING OF FIELD STAFF.....	7
4. METHOD OF DATA COLLECTION AND FIELD ORGANIZATION.....	8
5. DATA PROCESSING.....	9
a. EDITING, CODING AND VERIFICATION.....	9
b. DATA ENTRY, CLEANING AND TABULATION.....	9
PART III. SUMMARY OF THE MAJOR FINDINGS OF THE SURVEY.....	13
PART IV. STATISTICAL TABLES ON LARGE AND MEDIUM SCALE MANUFACTURING INDUSTRIES, 2002/2003 (1995 E.F.Y.).....	39
PART V. STATISTICAL TABLES ON TIME SERIES DATA OF LARGE AND MEDIUM SCALE MANUFACTURING INDUSTRIES, 1998/99 – 2002/2003 (1991 – 1995 E.F.Y.).....	163
PART VI. STATISTICAL TABLES ON ELECTRICITY INDUSTRIES, 1998/99- 2002/2003 (1991-1994 E.F.Y.).....	209
ANNEX: SURVEY QUESTIONNAIRE.....	215

LIST OF TABLES

PART III SUMMARY OF SELECTED SURVEY RESULTS

<u>TABLE NO.</u>	<u>PAGE NO.</u>
SUMMARY TABLE 3.1	
DISTRIBUTION OF LARGE AND MEDIUM SCALE MANUFACTURING INDUSTRIES BY REGIONAL STATES AND INDUSTRIAL GROUP PUBLIC AND PRIVATE.....	14
SUMMARY TABLE 3.2	
NUMBER OF PERSONS ENGAGED BY INDUSTRIAL GROUP – PUBLIC AND PRIVATE.....	16
SUMMARY TABLE 3.3	
NUMBER OF EMPLOYEES BY INDUSTRIAL GROUP – PUBLIC AND PRIVATE.....	17
SUMMARY TABLE 3.4	
PERCENTAGE DISTRIBUTION OF VALUE ADDED BY INDUSTRIAL GROUP – PUBLIC AND PRIVATE.....	18
SUMMARY TABLE 3.5	
RATIO OF IMPORTED TO TOTAL RAW MATERIAL COSTS BY INDUSTRIAL GROUP - PUBLIC AND PRIVATE.....	20
SUMMARY TABLE 3.6	
RATIO OF MAJOR INDICATORS – PUBLIC AND PRIVATE	22
SUMMARY TABLE 3.7	
RATIO OF COST OF ENERGY CONSUMED TO TOTAL INDUSTRIAL COST BY INDUSTRIAL GROUP – PUBLIC AND PRIVATE.....	23

<u>TABLE NO.</u>	<u>PAGE NO.</u>
SUMMARY TABLE 3.8	
RATIO OF VALUE ADDED TO GROSS VALUE OF PRODUCTION BY INDUSTRIAL GROUP – PUBLIC AND PRIVATE.....	25
SUMMARY TABLE 3.9	
RATIO OF COST OF LABOUR TO GROSS VALUE OF PRODUCTION BY INDUSTRIAL GROUP-PUBLIC AND PRIVATE	26
SUMMARY TABLE 3.10	
RATIO OF OPERATING SURPLUS TO GROSS VALUE OF PRODUCTION BY INDUSTRIAL GROUP-PUBLIC AND PRIVATE...	27
SUMMARY TABLE 3.11	
PERCENTAGE DISTRIBUTION OF ESTABLISHMENTS BY FIRST MAJOR REASON FOR NOT BEING FULLY OPERATIONAL AND INDUSTRIAL GROUP-PUBLIC AND PRIVATE.....	29
SUMMARY TABLE 3.12	
PERCENTAGE DISTRIBUTION OF ESTABLISHMENTS BY FIRST REASON FOR NOT WORKING AT FULL CAPACITY AND INDUSTRIAL GROUP-PUBLIC AND PRIVATE.....	30
SUMMARY TABLE 3.13	
PERCENTAGE DISTRIBUTION OF ESTABLISHMENTS BY TYPE OF FIRST MAJOR OPERATIONAL PROBLEM FACED AND INDUSTRIAL GROUP – PUBLIC AND PRIVATE.....	31
 PART IV. STATISTICAL TABLES ON LARGE AND MEDIUM SCALE MANUFACTURING INDUSTRIES, 2002/2003 (1995 E.F.Y.)	
4.1 COVERAGE OF THE SURVEY	41
4.2 PAID-UP CAPITAL OF REPORTING ESTABLISHMENTS BY SOURCE OF OWNERSHIP AND INDUSTRIAL GROUP	43
4.3 NUMBER OF REPORTING ESTABLISHMENTS BY SIZE OF PAID-UP CAPITAL AND INDUSTRIAL GROUP – PUBLIC AND PRIVATE.....	45

<u>TABLE NO.</u>	<u>PAGE NO.</u>
4.4 NUMBER OF REPORTING ESTBLISHMENTS BY SIZE OF PAID-UP CAPITAL AND INDUSTRIAL GROUP-PUBLIC	47
4.5 NUMBER OF REPORTING ESTABLISHMENTS BY SIZE OF PAID-UP CAPITAL AND INDUSTRIAL GROUP – PRIVATE	49
4.6 NUMBER OF ESTABLISHMENTS BY INDUSTRIAL GROUP AND FORM OF OWNERSHIP	51
4.7 NUMBER OF OWNERS OF PRIVATE ESTABLISHMENTS BY FORM OF OWNERSHIP, SEX AND INDUSTRIAL GROUP	53
4.8 NUMBER OF ESTABLISHMENTS WITH AND WITHOUT BOOKS OF ACCOUNTS BY THE CALENDER YEAR THEIR BOOKS OF ACCOUNTS ARE KEPT AND INDUSTRIAL GROUP-PUBLIC AND PRIVATE	55
4.9 NUMBER OF ESTABLISHMENTS WITH AND WITHOUT BOOKS OF ACCOUNTS BY THE CALENDAR YEAR THEIR BOOKS OF ACCOUNTS ARE KEPT AND INDUSTRIAL GROUP-PUBLIC	57
4.10 NUMBER OF ESTABLISHMENTS WITH AND WITHOUT BOOKS OF ACCOUNTS BY THE CALENDAR YEAR THEIR BOOKS OF ACCOUNTS ARE KEPT AND INDUSTRIAL GROUP – PRIVATE	59
4.11 NUMBER OF PERSONS ENGAGED BY SEX, NATIONALITY AND TOTAL WAGES AND SALARIES AND INDUSTRIAL GROUP PUBLIC AND PRIVATE	61
4.12NUMBER OF PERSONS ENGAGED BY SEX, NATIONALITY AND TOTAL WAGES AND SALARIES AND INDUSTRIAL GROUP – PUBLIC	63
4.13NUMBER OF PERSONS ENGAGED BY SEX, NATIONALITY AND TOTAL WAGES AND SALARIES AND INDUSTRIAL GROUP-PRIVATE	65
4.14NUMBER OF PERMANENT EMPLOYEES BY WAGES AND SALARIES GROUP – PUBLIC AND PRIVATE	67
4.15NUMBER OF PRODUCTION, APPRENTICES AND TEMPORARY WORKERS BY SEX, NATIONALITY AND INDUSTRIAL GROUP – PUBLIC AND PRIVATE	69

TABLE NO.**PAGE NO.**

4.16 NUMBER OF ADMINSITRATIVE, TECHNICAL, CLERICAL AND OFFICE WORKERS BY SEX, NATIONALITY AND INDUSTRIAL GROUP – PUBLIC AND PRIVATE	71
4.17 NUMBER OF WORKING PROPRIETORS, ACTIVE PARTNERS AND FAMILY WORKERS BY SEX, NATIONALITY AND INDUSTRIAL GROUP – PRIVATE	73
4.18 BASIC WAGES AND SALARIES, COMMISSION, BONUSES, ALLOWANCES, FOOD AND LODGING AND SUPPLEMENTS TO WAGES AND SALARIES BY INDUSTRIAL GROUP PUBLIC AND PRIVATE	75
4.19 BASIC WAGES AND SALARIES OF PRODUCTION WORKERS AND SEASONAL AND TEMPORARY WORKERS BY SEX, NATIONALITY AND INDUSTRIAL GROUP-PUBLIC AND PRIVATE.....	77
4.20 BASIC WAGES AND SALARIES OF ADINISTRATIVE, TECHNICAL, CLERICAL AND OFFICE WORKERS BY SEX, NATIONALITY AND INDUSTRIAL GROUP – PUBLIC AND PRIVATE	79
4.21 NUMBER OF ESTABLISHMENTS AND NUMBER OF PERSONS ENGAGED BY SIZE OF PERSONS ENGAGED AND ENDUSTRIAL GROUP – PUBLIC AND PRIVATE	81
4.22 NUMBER OF ESTBLISHMENTS AND NUMBER OF PERSONS ENGAGED BY SIZE OF PERSONS ENGAGED AND INDUSTRIAL GROUP – PUBLIC	83
4.23NUMBER OF ESTABLISHMETS AND NUMBER OF PERSONS ENGAGED BY SIZE OF PERSONS ENGAGED AND INDUSTRIAL GROUP-PRIVATE	85
4.24NUMBER OF ESTABLISHMENTS, GROSS VALUE OF PRODUCTION, INDUSTRIAL COSTS, INDIRECT TAXES NET AND CENSUS VALUE ADDED BY INDUSTRIAL GROUP-PUBLIC AND PRIVATE	87

<u>TABLE NO.</u>	<u>PAGE NO.</u>
4.25 NUMBER OF ESTABLISHMENTS, GROSS VALUE OF PRODUCTION, INDUSTRIAL COSTS, INDIRECT TAXES NET AND CENSUS VALUE ADDED BY INDUSTRIAL GROUP-PUBLIC.....	89
4.26 NUMBER OF ESTABLISHMENTS, GROSS VALUE OF PRODUCTION, INDUSTRIAL COSTS, INDIRECT TAXES NET AND CENSUS VALUE ADDED BY INDUSTRIAL GROUP-PRIVATE.....	91
4.27 NUMBER OF ESTABLISHMENTS, GROSS VALUE OF PRODUCTION, INDUSTRIAL AND NON-INDUSTRIAL COSTS, INDIRECT TAXES NET AND VALUE ADDED IN THE NATIONAL ACCOUNT CONCEPT BY INDUSTRIAL GROUP – PUBLIC AND PRIVATE.....	93
4.28 NUMBER OF ESTABLISHMENTS, GROSS VALUE OF PRODUCTION, INDUSTRIAL AND NON-INDUSTRIAL COSTS, INDIRECT TAXES NET AND VALUE ADDED IN THE NATIONAL ACCOUNT CONCEPT BY INDUSTRIAL GROUP – PUBLIC.....	95
4.29 NUMBER OF ESTABLISHMENTS, GROSS VALUE OF PRODUCTION, INDUSTRIAL AND NON-INDUSTRIAL COSTS, INDIRECT TAXES NET AND VALUE ADDED IN THE NATIONAL ACCOUNT CONCEPT BY INDUSTRIAL GROUP – PRIVATE.....	97
4.30 GROSS VALUE OF PRODUCTION IN PRODUCERS' VALUES BY INDUSTRIAL GROUP – PUBLIC AND PRIVATE.....	99
4.31 ACTUAL VALUE OF PRODUCTION AS PERCENTAGE OF YEARLY CAPACITY BY INDUSTRIAL GROUP – PUBLIC AND PRIVATE.....	101
4.32 ACTUAL VALUE OF PRODUCTION AS PERCENTAGE OF YEARLY CAPACITY BY INDUSTRIAL GROUP – PUBLIC.....	103
4.33 ACTUAL VALUE OF PRODUCTION AS PERCENTAGE OF YEARLY CAPACITY BY INDUSTRIAL GROUP – PRIVATE.....	105
4.34 GROSS VALUE OF PRODUCTION BY SIZE OF PERSONS ENGAGED AND INDUSTRIAL GROUP – PUBLIC AND PRIVATE.....	107
4.35 GROSS VALUE OF PRODUCTION BY SIZE OF PERSONS ENGAGED AND INDUSTRIAL GROUP – PUBLIC.....	109

<u>TABLE NO.</u>	<u>PAGE NO.</u>
4.36 GROSS VALUE OF PRODUCTION BY SIZE OF PERSONS ENGAGED AND INDUSTRIAL GROUP – PRIVATE	111
4.37 VALUE ADDED BY SIZE OF PERSONS ENGAGED AND INDUSTRIAL GROUP – PUBLIC AND PRIVATE	113
4.38 VALUE ADDED BY SIZE OF PERSONS ENGAGED AND INDUSTRIAL GROUP – PUBLIC	115
4.39 VALUE ADDED BY SIZE OF PERSONS ENGAGED AND INDUSTRIAL GROUP – PRIVATE	117
4.40 SUMMARY OF OPERATIONS OF LARGE NAD MEDIUM SCALE MANUFACTURING INDUSTRIES BY REGIONAL STATES AND MAJOR URBAN CENTERS – PUBLIC AND PRIVATE	119
4.41 SUMMARY OF OPERATIONS OF LARGE NAD MEDIUM SCALE MANUFACTURING INDUSTRIES BY REGIONAL STATES AND MAJOR URBAN CENTERS – PUBLIC	120
4.42 SUMMARY OF OPERATIONS OF LARGE NAD MEDIUM SCALE MANUFACTURING INDUSTRIES BY REGIONAL STATES AND MAJOR URBAN CENTERS – PRIVATE	121
4.43 FIXED ASSETS AND NEW CAPITAL EXPENDITURE BY INDUSTRIAL GROUP AND OWNERSHIP	122
4.44 FIXED ASSETS OF REPORTING ESTBALISHMENTS BY TYPE AND INDUSTRIAL GROUP – PUBLIC AND PRIVATE	124
4.45 FIXED ASSETS OF REPORTING ESTBALISHMENTS BY TYPE AND INDUSTRIAL GROUP – PUBLIC	126
4.46 FIXED ASSETS OF REPORTING ESTBALISHMENTS BY TYPE AND INDUSTRIAL GROUP – PRIVATE	128
4.47 FIXED ASSETS BY SIZE OF PERSONS ENGAGED AND INDUSTRIAL GROUP – PUBLIC AND PRIVATE	130
4.48 FIXED ASSETS BY SIZE OF PERSONS ENGAGED AND INDUSTRIAL GROUP – PUBLIC	132

TABLE NO.**PAGE NO.**

4.49	FIXED ASSETS BY SIZE OF PERSONS ENGAGED AND INDUSTRIAL GROUP – PRIVATE	134
4.50	INVESTMENT IN FIXED ASSETS OF REPORTING ESTABLISHMENTS BY SOURCE AND INDUSTRIAL GROUP – PUBLIC AND PRIVATE.....	136
4.51	QUANTITY OF MAJOR RAW MATERIALS CONSUMED FOR REPORTING ESTABLISHMENTS BY INDUSTRIAL GROUP – PUBLIC AND PRIVATE ...	137
4.52	COST OF RAW METERIALS, ENERGY CONSUMED AND PAYMENTS FOR INDUSTRIAL AND NON-INDUSTRIAL SERVICES RENDERED BY INDUSTRIAL GROUP-PUBLIC AND PRIVATE.....	139
4.53	COST OF RAW METERIALS, ENERGY CONSUMED AND PAYMENTS FOR INDUSTRIAL AND NON-INDUSTRIAL SERVICES RENDERED BY INDUSTRIAL GROUP-PUBLIC.....	141
4.54	COST OF RAW METERIALS, ENERGY CONSUMED AND PAYMENTS FOR INDUSTRIAL AND NON-INDUSTRIAL SERVICES RENDERED BY INDUSTRIAL GROUP – PRIVATE	143
4.55	NUMBER OF ESTABLISHMENTS AND COST OF ENERGY CONSUMED BY INDUSTRIAL GROUP – PUBLIC AND PRIVATE	145
4.56	NUMBER OF ESTABLISHMENTS AND COST OF ENERGY CONSUMED BY INDUSTRIAL GROUP – PUBLIC.....	147
4.57	NUMBER OF ESTABLISHMENTS AND COST OF ENERGY CONSUMED BY INDUSTRIAL GROUP – PRIVATE	149
4.58	PRODUCTION OF MAJOR MANUFACTURED ARTICLES FOR REPORTING ESTABLISHMENTS BY INDUSTRIAL GROUP-PUBLIC AND PRIVATE.....	151
4.59	NUMBER OF ESTABLISHMENTS AND TOTAL REVENUE FROM SALES BY INDUSTRIAL GROUP – PUBLIC AND PRIVATE.....	153
4.60	REVENUE FROM SALES BY SOURCE AND INDUSTRIAL GROUP-PUBLIC AND PRIVATE	155
4.61	REVENUE FROM SALES BY SOURCE AND INDUSTRIAL GROUP-PUBLIC.....	157

<u>TABLE NO.</u>	<u>PAGE NO.</u>
4.62 REVENUE FROM SALES BY SOURCE AND INDUSTRIAL GROUP- PRIVATE	159
4.63 ADVERTISING EXPENSE OF REPORTING ESTABLISHMENTS BY INDUSTRIAL GROUP	161
PART V. TIME SERIES DATA AND RATIOS OF MAJOR INDICATORS....ON MANUFACTURING INDUSTRIES, 1998/99 – 2002/2003 (1991 – 1995 E.F.Y.)	
5.1 NUMBER OF ESTABLISHMENTS BY INDUSTRIAL GROUP – PUBLIC AND PRIVATE	165
5.2 NUMBER OF PERSONS ENGAGED BY INDUSTRIAL GROUP – PUBLIC AND PRIVATE	167
5.3 NUMBER OF EMPLOYEES BY INDUSTRIAL GROUP – PUBLIC AND PRIVATE	169
5.4 NUMBER OF FEMALE EMPLOYEES BY INDUSTRIAL GROUP – PUBLIC AND PRIVATE	171
5.5 WAGES AND SALARIES BY INDUSTRIAL GROUP – PUBLIC AND PRIVATE	173
5.6 GROSS VALUE OF PRODUCTION BY INDUSTRIAL GROUP – PUBLIC AND PRIVATE	175
5.7 CENSUS VALUE ADDED (AT MARKET PRICE) BY INDUSTRIAL GROUP – PUBLIC AND PRIVATE	177
5.8 CENSUS VALUE ADDED (AT FACTOR CSOT) BY INDUSTRIAL GROUP – PUBLIC AND PRIVATE	179
5.9 VALUE ADDED IN THE NATIONAL ACCOUNT CONCEPT (AT MARKET PRICE) BY INDUSTRIAL GROUP – PUBLIC AND PRIVATE	181
5.10 VALUE ADDED IN THE NATIONAL ACCOUNT CONCEPT (AT FACTOR COST) BY INDUSTRIAL GROUP – PUBLIC AND PRIVATE	183
5.11 PRODUCTION OF MAJOR MANUFACTURED ARTICLES – PUBLIC AND PRIVATE	185
5.12 TOTAL FIXED ASSETS BY INDUSTRIAL GROUP – PUBLIC AND PRIVATE	187

<u>TABLE NO.</u>	<u>PAGE NO.</u>
5.13 NEW CAPITAL EXPENDITURE BY INDUSTRIAL GROUP PUBLIC AND PRIVATE.....	189
5.14 OPERATING SURPLUS BY INDUSTRIAL GROUP – PUBLIC AND PRIVATE.....	191
5.15 RATIO OF IMPORTED TO TOTAL RAW MATERIAL COST BY INDUSTRIAL GROUP- PUBLIC AND PRIVATE.....	193
5.16 PERCENTAGE DISTRIBUTION OF VALUE ADDED BY INDUSTRIAL GROUP – PUBLIC AND PRIVATE.....	195
5.17 RATIO OF COST OF ENERGY CONSUMED TO TOTAL INDUSTRIAL COSTS BY INDUSTRIAL GROUP – PUBLIC AND PRIVATE.....	197
5.18 RATIO OF VALUE ADDED TO GROSS VALUE OF PRODUCTION PUBLIC AND PRIVATE.....	199
5.19 VALUE ADDED PER PERSON ENGAGED BY INDUSTRIAL GROUP- PUBLIC AND PRIVATE.....	201
5.20 RATIO OF COST OF LABOUR TO VALUE ADDED BY INDUSTRIAL GROUP – PUBLIC AND PRIVATE.....	203
5.21 RATIO OF COST OF LABOUR TO GROSS VALUE OF PRODUCTION BY INDUSTRIAL GROUP- PUBLIC AND PRIVATE.....	205
5.22 RATIO OF OPERATING SURPLUS TO GROSS VALUE OF PRODUCTION BY INDUSTRIAL GROUP- PUBLIC AND PRIVATE.....	207

PART VI. TIME SERIES DATA ON ELECTRICITY INDUSTRY

1998/99 – 2002/2003 (1991 – 1995 E.F.Y.)

6.1 NUMBER OF EMPLOYEES BY OCCUPATIONAL GROUP AND SEX IN ELECTRICITY INDUSTRY.....	211
6.2 NUMBER OF EMPLOYEES BY WAGES AND SALARIES GROUP AND SEX IN ELECTRICITY INDUSTRY.....	211
6.3 WAGES AND SALARIES PAID BY OCCUPATIONAL GROUP IN ELECTRICITY INDUSTRY.....	212

TABLE NO.**PAGE NO.**

6.4	INSTALLED GENERATING CAPACITY AND ELECTRICITY PRODUCTION.....	212
6.5	QUANTITY OF ELECTRICITY SOLD AND REVENUE FROM SALES OF ELECTRICITY BY TYPE OF TARIFF	213
6.6	GROSS REVENUE FROM SALES, TOTAL INTERMEDIATE COST AND VALUE ADDED IN THE ELECTICITY INDUSTRY.....	213
6.7	VALUE OF FIXED ASSETS BY TYPE IN ELECTRICITY INDUSTRY	214
6.8	INVESTMENT IN FIXED ASSETS BY TYPE OF FIXED ASSETS IN ELECTICITY INDUSTRY	214

LISTS OF FIGURES**FIGURE NO.****PAGE NO.**

FIG. I	GROSS VALUE OF PRODUCTION AT CURRENT PRICE BY OWNERSHIP, 1998/99 – 2002/2003 (1991 –1995 E.F.Y.).....	32
FIG. II	VALUE ADDED BY OWNERSHIP, 1998/99 – 2002/2003 (1991 –1995 E.F.Y.).....	33
FIG. III	PERCENTAGE DISTRIBUTION OF VALUE ADDED BY INDUSTRIAL GROUP, 2002/2003 (1995 E.F.Y.).....	34
FIG. IV	RATIO OF IMPORTED TOTAL RAW MATERIAL COST BY INDUSTRIAL GROUP, 2002/2003 (1995 E.F.Y.).....	35
FIG. V	RATIO OF VALUE ADDED TO GROSS VALUE OF PRODUCTION, 2002/2003 (1995 E.F.Y.)	36
FIG. VI	INSTALLED GENERATING CAPACITY, 1998/99 – 2002/2003 (1991 –1995 E.F.Y.).....	37
FIG. VII	PRODUCTION OF ELECTRICITY, 1998/99 – 2002/2003 (1991 –1995 E.F.Y.).....	38

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
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 on 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 sector 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 bulleting 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 survey. Part IV deals with the

results of Large and medium scale manufacturing establishments for the year 2002/2003 (1995 E.F.Y). Part V deals with the time series data and various ratios for the period of five years i.e. 1998/99-2002/2003 (1991-1995 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 same period. Furthermore, the survey questionnaire for large and medium scale manufacturing Industries survey 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 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 create stumbling block to their activities. The identification of the problems is required for planning and executing any type of government intervention program.

PART II

SURVEY METHODOLOG, 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. 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 in 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 the corresponding bureaus of the Regional States of the country for the public and private establishments. In addition to this, the directory was updated using lists obtained from house to house listing for the purpose of the 1994 E.F.Y. Small Scale Manufacturing Industries Survey. From this list all manufacturing establishments which engaged 10 persons and above were selected and included in the directory of large and medium scale manufacturing establishment. The number of establishments covered in this reference year increased by 56 than that of the previous survey period.

In this publication detailed information on number of establishments, number of persons engaged, and employees, wages and salaries paid by industrial group, sex, nationality and occupation, paid-up capital, gross value of production, industrial and non-industrial costs, value added, operating surplus, quantity of production and raw materials consumed, fixed assets, investment and production 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 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' contributions 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 spare parts supplied by the customer.
- (xv) **Receipt of Products Bought and Resold**: - refers to revenue obtained from sales of all goods bought and resold 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 of stocks 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 of stocks between the beginning and end of the reference period in the value of finished goods and the value of semi finished goods, 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 that 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. 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. (interest, amortization and depreciation are 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, which is the net book value at the beginning plus new capital expenditure minus those sold and disposed and depreciation during the reference year.