

FACTS AND TRENDS

Latest figures for Germany – Edition 2006



Federal Statistical Office of Germany

Published by:

Statistisches Bundesamt, Wiesbaden

Edited by:

Division IC, Kerstin Hänsel

Editorial deadline: 19 January 2006

Periodicity: annual

Published in February 2006.

Order number: 0000115-06700-1

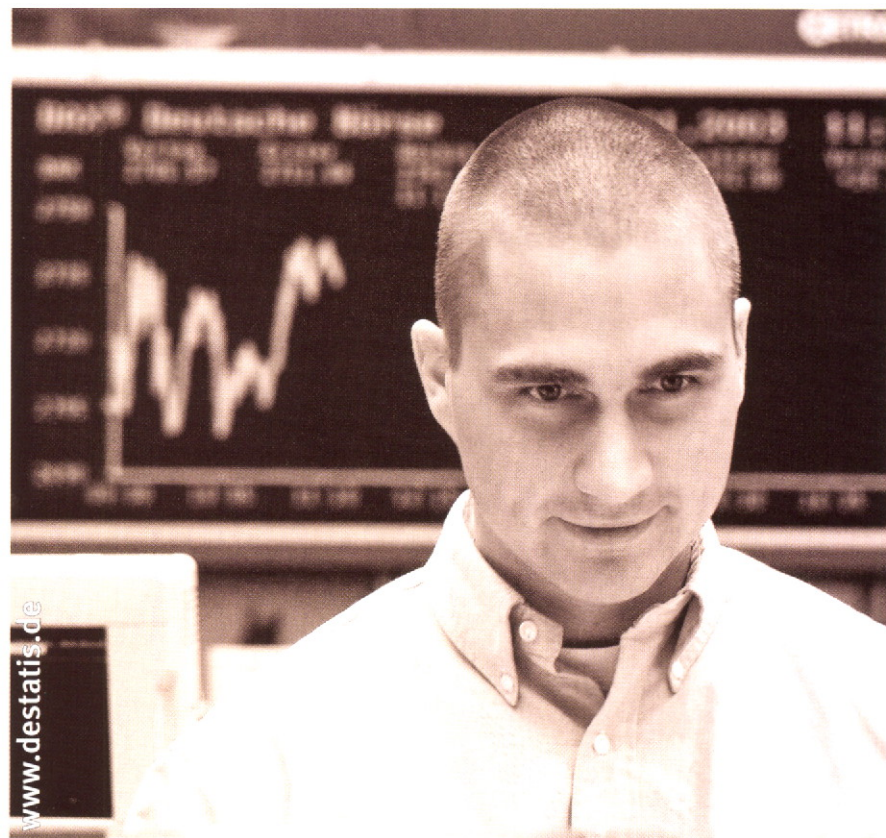
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Contents



1	Economy	2
2	Employment	4
3	Prices	6
4	Foreign trade	8
5	Population	10
6	Working hours	12
7	Health	14
8	Sport	16
9	Transport	18



Economic growth in 2005 supported by exports

The economic revival of 2004 has fallen off slightly over the past year: German Gross Domestic Product (GDP) increased by 0.9% in 2005 when adjusted for price changes. Taking account of the lower number of working days in 2005, real economic growth adjusted for working-day variations, at 1.1%, was however just as high as in 2004.

Economic growth was essentially supported by foreign trade in 2005: The continuing demand from abroad ensured in particular that more goods were exported than imported. By contrast, domestic demand continued to be weak: Private consumption expenditure was stagnant, state consumption expenditure fell slightly; however, investment in machinery and equipment was much higher than in 2004.

According to initial preliminary calculations, the state sector's expenditure was Euro 78 billion higher in 2005 than its receipts. This corresponds to 3.5% when measured against Gross Domestic Product in respective prices. Although this is the lowest government deficit since 2001, it is still in excess of the reference value of 3% of Gross Domestic Product stipulated in the Maastricht Treaty's Protocol on the excessive deficit procedure. Germany is not alone in this: Portugal (6%), Italy (4.3%), Greece (3.7%), the United Kingdom (3.4%) and France (3.2%) probably also have an excessive deficit.

Germany in an international comparison

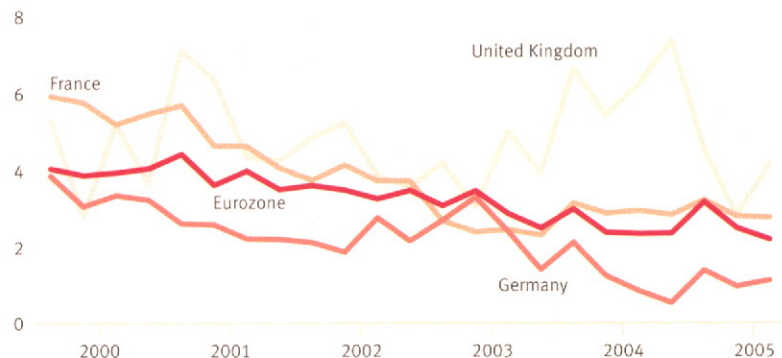
Germany was also one of the countries with rather weak economic trends in 2005. Within the European Union (EU), the European Commission only expects similar economic growth of less than 1% for Italy, Portugal and the Netherlands. By contrast, real GDP is expected to grow in the EU15 overall by 1.4%, by 1.5% in the EU25, by 2.7% in Japan and by 4.2% in the USA.

According to a prognosis by the European Commission, the German share of the nominal Gross Domestic Product of the 25 EU Member States, at Euro 2,244 billion, accounted for roughly 21%. This means that one Euro in five of the EU25's GDP was made in Germany.

The rather weak economic growth is accompanied by continuing moderate growth in labour costs in Germany. At 1.1%, the rise in costs in the production industries and in part of the service sector was much lower in the third quarter of 2005 than the EU25 average of 2.7% (Eurozone: 2.2%) and on a year-on-year basis was lower than in all other Member States of the EU. In comparison to this, France showed growth of 2.8% and the United Kingdom of 4.2%.

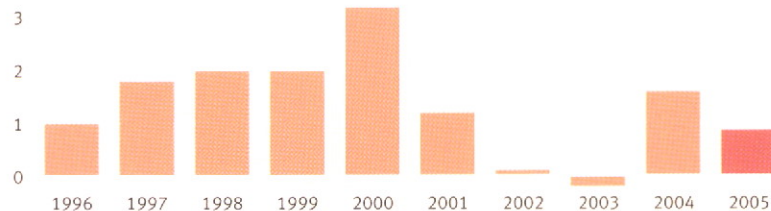
Index of labour costs for the production industries and selected service sectors

(Year-on-year change in %)



Source: Eurostat, Federal Statistical Office

Gross domestic product (Year-on-year change in %)





Slight fall in the number of those in work in 2005

Preliminary results show that roughly 38.7 million people were in work in Germany taken as an average over 2005. This was 121,000 persons or 0.3 % fewer than one year previously. The number of those in work hence fell in 2005 back to the level of 2003.

In a long-term comparison, roughly 1.25 million more people were in work in 2005 than was the case ten years ago. This increase is caused primarily by the greater number of those exclusively in insignificant employment and by the expansion of labour market policy-promoted types of employment which more than compensate for the fall in employment subject to full obligatory social contributions.

Young people, Eastern Germans and women are more frequently unemployed

According to results of the ILO's labour market statistics, an average of 3.89 million persons were unemployed in Germany in 2005, this being 40,000 or 1.0% fewer than on average in 2004. As in the previous year, the share of the unemployed in the total active population was 9.2%. After the rising unemployment rates observed in the previous years, the situation on the labour market is currently stable.

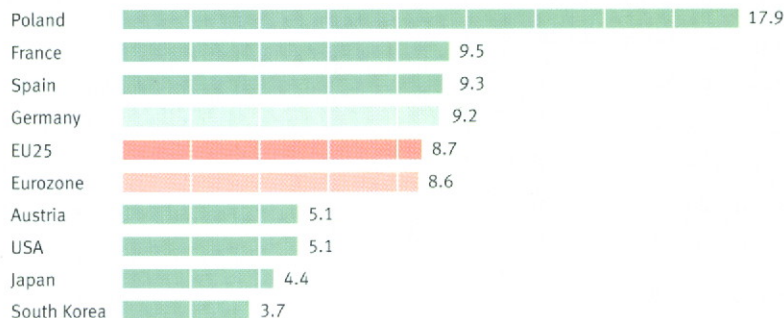
Unemployment still affects young people particularly strongly: Taken as an annual average, the unemployment rate for persons under 25 in 2005 was 15.8%. This also includes school pupils and students looking for additional income.

Unemployment is much higher in the East of Germany including Berlin, at 13.1%, than in the former territory of the Federal Republic (8.1%). Women (9.5%) in all parts of Germany are somewhat more frequently unemployed than men (8.8%).

The German unemployment rate is in the middle range in an international comparison. Whilst for instance Poland, like many Eastern European countries, is affected by higher unemployment with an unemployment rate of about 17.9%, unemployment was much lower in the USA (5.1%), Japan (4.4%), and Austria (5.1%).

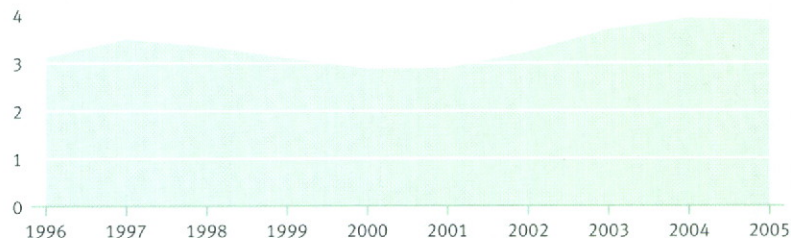
Unemployment in selected countries acc. to ILO standard

(Average December 2004 to November 2005, unemployment rates in %)



Source: Federal Statistical Office, National Statistical Offices

Trends in unemployment in Germany (Unemployed in millions)





Energy and tobacco goods cause consumer prices to rise

The main causes for the average 2.0% increase in consumer prices in Germany in 2005 were energy and tobacco goods, which underwent the most rapid rise since 2001. Had it not been for mineral oil products and tobacco goods, prices would only have gone up by 1.2%.

Households especially had to pay much more for light heating oil in 2005 than in 2004 (32.0%); mineral oil products went up by 12.3% overall. The prices of other sources of household energy also increased faster than average. Gas prices rose within the last year by 10.5% and electricity prices by 4.2%. Owners of diesel-driven vehicles were particularly affected. They suffered price increases at the pumps of 13.6%; overall, filling up became 8.1% more expensive for consumers.

As in the previous year, smoking also became much more expensive once again in 2005: The tobacco tax rises in December 2004 and September 2005 led to price increases totalling 14.0% for cigarettes, cigars, cigarillos and fine cut.

Prices for food, by contrast, remained unchanged on average in 2005. The only notable rise was with coffee beans, which went up by 12.7%, and hence compensated for the reductions in coffee prices from the previous years.

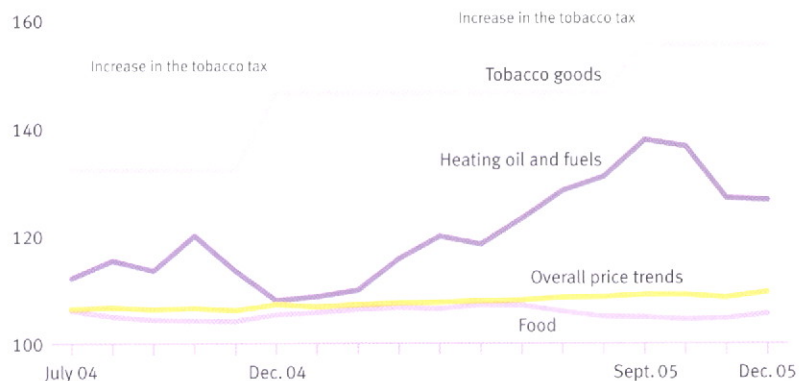
Technical equipment also continued to become cheaper in 2005: Most prominently, telephone and fax machines fell by an average of 13.8%, and information processing equipment went down by 10.3%. Anyone wanting to buy photographic and film equipment saved an average of 8.3% as against the previous year.

Price increases in Europe remain almost unchanged

The 2.2% inflation rates in the EU and in the Eurozone were slightly higher than the rates of the previous year.

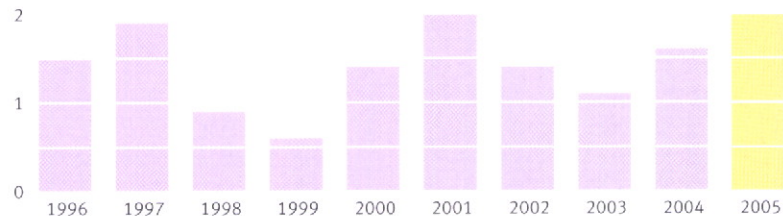
Germany's inflation rate was in the lower middle range of the EU in 2005: The Harmonised Indices of Consumer Prices (HICPs), which make it possible to compare price trends between EU States, increased by 1.9% in Germany in 2005 (2004: 1.8%). The greatest increases were observed in the Baltic States Latvia (6.9%) and Estonia (4.1%), while the lowest price increases took place in Finland and Sweden, both at 0.8%.

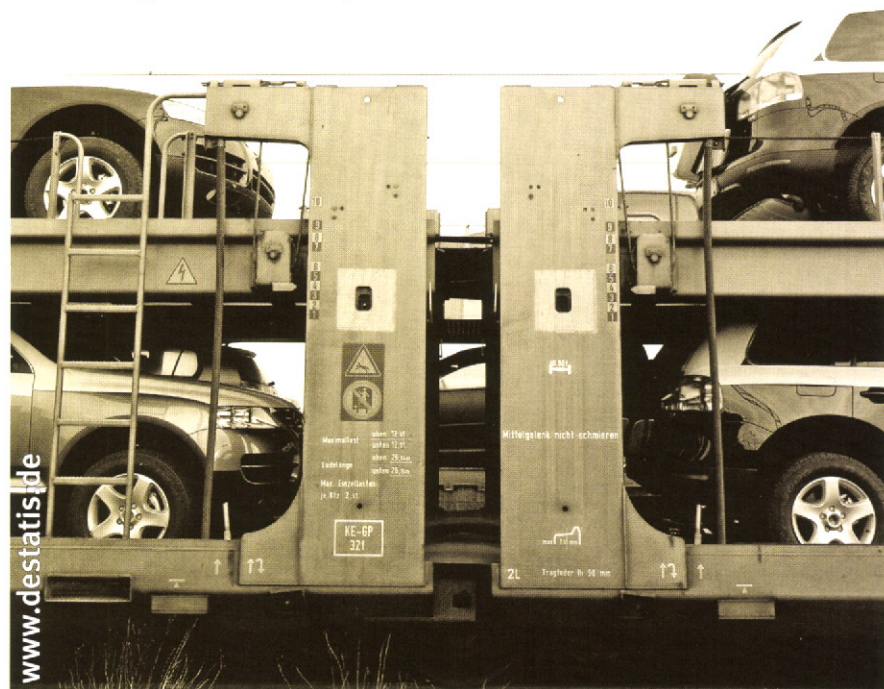
Price trends of selected goods (Consumer price index, 2000=100)



Inflation rate in Germany

(Consumer price index for Germany, average year-on-year change in %)





Germany still leads the world in exports

According to preliminary data, Germany achieved a foreign trade surplus of Euro 164 billion in 2005: It is anticipated that goods valued at about Euro 785 billion were exported and goods valued at roughly Euro 621 billion were imported. In comparison with 2004, exports have increased by about 7 % and imports by roughly 8 %. Germany was therefore the world's largest exporting nation for the third time in a row.

About three-quarters of exports of goods with a 'Made in Germany' label went to European countries, with almost two-thirds destined for the European Union. The second most important sales market for German goods was the USA (12 %), followed by Asia (11 %). Only a small share of exports went to Africa (2 %) and Australia/Oceania (1 %).

Germany's imports also came largely from Europe (72 %), followed by Asia (16 %) and the USA (9 %). Goods from Africa (2 %) and Australia/Oceania (3 %) only accounted for a small share.

France has for a long time been Germany's most important trade partner: Roughly 10 % of German exports were destined for France, while almost 11 % of German imports originated there.

Trade with China and the USA

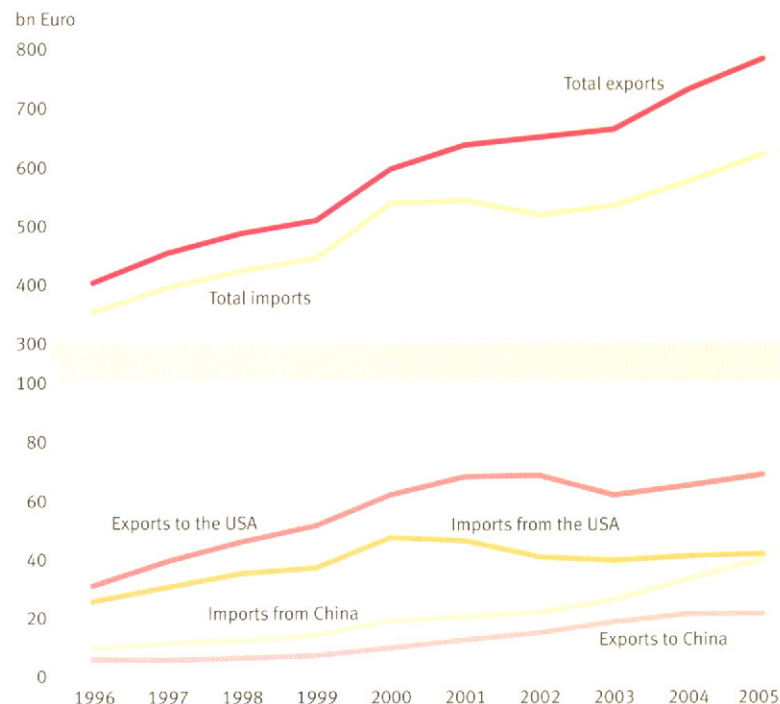
Germany's most important non-European trade partners are China and the USA.

China in particular is becoming ever more important when it comes to imports: Both imports from and exports to China have roughly quadrupled since 1995. The volume of imports from China was much higher in 2005 than that of exports to China. Germany's principle deliveries to China were machinery and equipment (roughly one-third), as well as motor vehicles and parts (10%). The imports consisted mainly of office machinery and computers (19%), communication equipment and apparatus, radio, television, other electronic components (17%) and wearing apparel (11%).

Germany has traditionally high balance of trade surpluses with the United States, i.e. it exports more to the USA than it imports from the USA: Exports to the USA have increased by 145 % since 1995, whilst imports from the USA have gone up by 80 %.

Almost one-third (30%) of all exports to the USA were from the auto industry (motor vehicles and parts); machinery and equipment accounted for 17%. The principal imported goods from the United States were vehicles (not incl. motor vehicles) and chemical products, each accounting for one-fifth (20%).

Germany's foreign trade with the United States and China





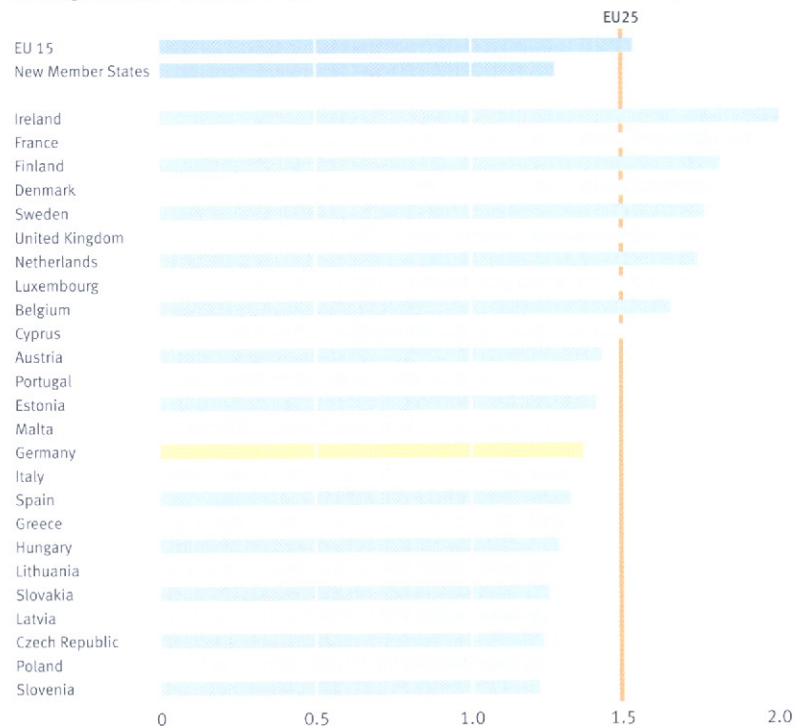
Fall in population forecast once more for 2005

It is anticipated that the number of Germany's inhabitants has fallen slightly in 2005, from 82.5 to 82.45 million people. The fact is that fewer children have been born each year in Germany in recent years than in the previous year. Whilst roughly 900,000 children were born in 1990, there were only 706,000 in 2004, and a figure of only between 680,000 and 690,000 children is anticipated for 2005. The number of deaths in 2005 is estimated between 820,000 and 830,000, and hence is likely to have increased slightly as against 2004 (818,000).

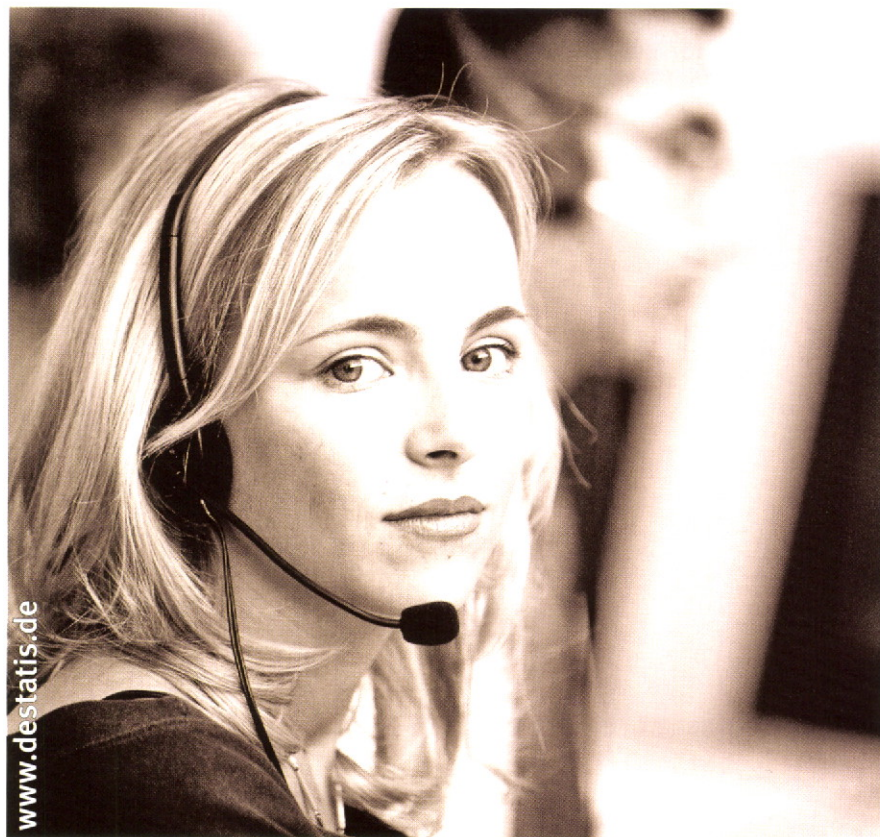
The fall in the birth rate is one of the major causes of the ageing of the population. The average number of children per woman in Germany was more than two until the end of the sixties, but this then fell sharply and has been fluctuating around 1.4 for thirty years. The total fertility rate in Germany was 1.36 in 2004.

If a child is born in Germany, his or her parents are usually married, but the number of children born out of wedlock has increased continuously. Almost three out of four children (72 %) were born in wedlock in 2004. Since women and men have been marrying later and later in recent years, many married couples have less time to have children in biological terms. For the first time, women in Germany are marrying at an average age of 29, while men are over 32. For comparison: At the beginning of the nineties, single men were an average of four years younger on marriage, and women 3 years. 15 years ago, a married woman was not quite 27 when she had her first child, whilst currently she is almost 30 when the first child from the present marriage is born.

Average number of children per woman 2004 in the EU25 (Total Fertility Rates)



Source: Eurostat



Part-time employment is causing a reduction in the volume of labour

The number of those in part-time employment in Germany has doubled since 1991 from 5.5 million to reach a figure of 11.1 million employees in 2005. The share increased from 15.7% to 32.3% of the dependent workforce. At the same time, the number of those in full-time employment in the same period fell from 29.6 million to 23.3 million employees.

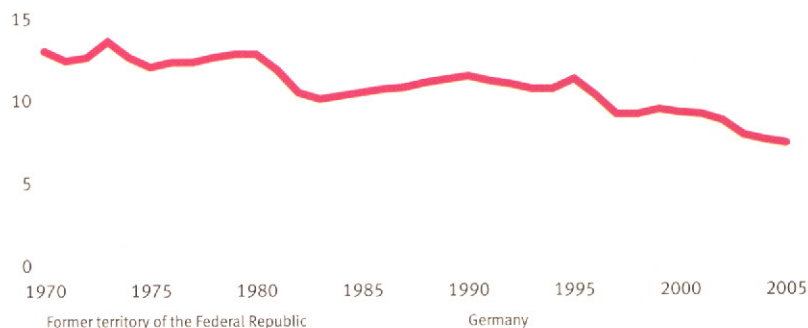
The macroeconomic volume of labour, which is calculated as the product of the number of employees and working hours per employee, was roughly 55.6 billion hours in 2005. It is used amongst other things as an indicator of labour productivity to calculate a country's economic potential. Because in calendar terms 2005 had fewer working days, and more people are in part-time employment every year (including in so-called "minijobs"), the working hours put in by the total workforce fell by 0.6%.

An above-average number of working hours was put in by employees in agriculture and forestry, as well as in construction – measured by working hours per employee. The number of working hours put in by employees for public and private services was lower since a particularly large number of workers are in insignificant employment in these industries.

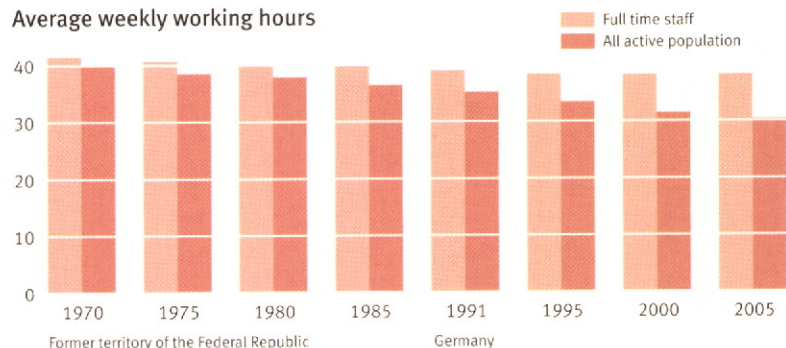
The working hours put in per employee fell by 7.1% in comparison to 1991. This too is caused by the increasing share of those in part-time employment, and above all by insignificant employment.

The weekly hours worked according to collective agreements and those usual in companies have been on the decline in Germany for quite some time, but increased slightly in 2005. Whilst full-time employees still worked 41.5 hours per week in the former territory of the Federal Republic in 1970, weekly working hours have fallen from 39 hours (1990) to 38.2 hours in Germany since reunification, and have remained constant at this level since 1996. The average weekly working hours for all employees (full- and part-time) have fallen since reunification from an average of 35.2 to 30.3 hours. The increase in part-time employment has also been crucial to this decline.

Absenteeism in working days (Per worker per year)



Average weekly working hours





Two diseases taking on pandemic (worldwide) proportions, of which people die in Germany every year, are influenza and HIV (Human Immunodeficiency Virus) – on progression to AIDS (Acquired Immune Deficiency Syndrome).

Incalculable influenza viruses

It is not easy to ascertain what causes a widespread outbreak of influenza in Germany. It is at least impossible to observe a recognisable trend in the spread of influenza viruses: In 1994 roughly 9,200 patients were treated institutionally for influenza in a hospital, and the number of patients went on to increase to 12,600 in the two ensuing years (1996). The number of patients suffering from influenza had fallen by more than half by 2002 (5,800). However, this decrease was short-lived: In the next year, again, more than 11,600 patients had to be treated institutionally in a hospital for influenza.

The average number of people dying of influenza in Germany also fluctuates considerably from one year to another, but not in line with the number of patients treated for influenza: For instance, in 1995 425 people died of the consequences of influenza, whilst in 2001 it was 72. A total of 300 people died of an influenza infection in 2003.

Fresh HIV infections are on the increase once more

The data on the spread and course of the HI virus show a changeable development in Germany: The number of people dying of AIDS in the past ten years has fallen from 2,045 persons (1995) to 507 persons (2004), i.e. by more than 75 %, but the number of newly-registered HIV-positive cases has increased once again in recent years. For instance, a total of 2,229 fresh cases were registered in 1995, but there were only 1,690 new infections in 2000. In 2004, however, the number of new infections increased by 22%, to a total of 2,058. The Robert Koch Institute estimates that this number will be even higher in 2005. The intensive prevention campaigns at the end of the eighties had probably created an awareness among the population and led to a fall in the number of fresh infections. The recent increase in the figures permits one to presume that this caution is giving way to a certain carelessness.

Most people in Germany however die of diseases of the heart-circulation system: 368,472 people died of it in 2004. Tumours are the second most common cause of death, with 214,863 cases. 33,309 people lost their lives because of external circumstances in 2004, such as accidents, including 10,733 who committed suicide.

Working doctors and inhabitants by Federal Länder (31 December 2004)

	Doctors	Doctors per 1,000 inhabitants	Inhabitants per km ²	Inhabitants in 1,000
Hamburg	9 404	5.4	2 297	1 735
Berlin	17 867	5.3	3 799	3 388
Bremen	3 244	4.9	1 641	663
Saarland	4 166	3.9	411	1 056
Bayern	49 047	3.9	176	12 444
Hessen	23 101	3.8	289	6 098
Baden-Württemberg	39 420	3.7	300	10 717
Schleswig-Holstein	10 467	3.7	179	2 829
Nordrhein-Westfalen	65 462	3.6	530	18 075
Mecklenburg-Vorpommern	6 202	3.6	74	1 720
Rheinland-Pfalz	14 240	3.5	205	4 061
Thüringen	7 795	3.3	146	2 355
Sachsen	14 220	3.3	233	4 296
Sachsen-Anhalt	8 141	3.3	122	2 494
Niedersachsen	25 863	3.2	168	8 001
Brandenburg	7 787	3.0	87	2 568
Germany	306 435	3.7	231	82 501

Source: Federal Statistical Office, Federal Medical Association



Football is king

The Football World Cup is to take place from 9 June to 9 July 2006 in a country which is enthusiastic about sport: Football is Germany's top sport. The German Football Federation (DFB), established in 1900, is the largest sports association in the world, with almost 6.3 million members in 26,000 clubs. Since the Football World Cup was first held in 1930, the German national football team has won the tournament three times (in 1954, 1974 and 1990), has come in as runner-up four times, and has reached the final competition of the World Cup a total of 16 times. The World Cup took place in Germany for the first time in 1974.

Football in Germany was already no longer a matter for men only even before the women's national team won the 2003 Women's World Cup title in the USA. Currently, the DFB has more than 870,000 (14 %) female members. World and European Champion Germany is number one in the women's football world rankings list (2005) of the FIFA world association, ahead of Olympic winners USA and Norway. Since the first world cup took place in 1991, the German women's national team has already become world champion once (2003) and taken second place once (1995).

Football is also an economic factor: Roughly 18 million pairs of sports shoes were imported to Germany from January to October 2005, almost 2 million more than in

all of 2004. Inflatable leather balls at a value of more than Euro 4.4 million were already imported in the first ten months of 2005. This corresponds to 85% of the goods value for leather balls for all of 2004 (Euro 5.2 million). The main supplier of sports shoes is China (14 million pairs). Leather balls come primarily from Pakistan (valued at Euro 1.7 million).

The Germans are committed to other types of sport as well: The second-largest German sports association is the German Gymnastics Federation (DTB), with roughly 5.1 million members in 2004 in more than 20,000 clubs. The Federation fills the youngest with the most enthusiasm: One DTB member in three is younger than 15. Unlike the DFB, there are more women members than men: More than two members out of three are female.

Tennis too has become a popular sport in Germany: According to the information provided by the DTB, almost 1.8 million tennis enthusiasts meet regularly in roughly 10,000 clubs to play on one of the more than 50,000 tennis courts. The chances of having a 'mixed double' are particularly good here since this type of sport is played by almost as many women (41%) as men (59%).

German national associations by members 2004

	Total members	of whom aged from ... to ... years		
		under 15	15-40	41 and older
Football	6 272 804	1 561 648	2 632 050	2 079 106
Gymnastics	5 084 612	1 715 273	1 403 336	1 966 003
Tennis	1 767 226	262 514	585 916	918 796
Rifle clubs	1 529 542	78 270	511 731	939 541
Light athletics	885 335	287 530	297 426	300 379
Handball	826 615	238 253	382 145	206 217
Riding	761 294	191 868	569 426	
Club fishing	669 164	35 348	251 860	381 956
Table tennis	665 140	126 612	310 379	228 149
Skiing	660 381	125 970	262 375	272 036
Swimming	610 110	298 260	169 943	141 908
German Life-savers Society	562 912	233 326	200 801	128 785
Volleyball	501 683	77 264	280 986	143 433
Golf	456 799	24 026	184 481	248 292
Disabled sport	341 916	20 663	62 536	258 717

Source: German Sports Federation



Fewer goods transported

2005 was an important year for Germany in terms of transport policy: After protracted preparations, an electronic, satellite-guided toll system for goods transport was brought into operation on Germany's 12,044 km of motorways, bringing in roughly Euro 2.86 billion in revenue. In 2005, three-quarters of the goods transported (77 %; totalling 3 billion t) were taken by road. All in all, 4 billion tonnes of goods (0.2% less than in the previous year) were transported in Germany in 2005, taking all modes of transport together. 306 million tonnes were transported by rail, accounting for 8% of total goods transport capacity. There was a boom in shipping which also continued into 2005, with above-average growth of roughly 4%, and transport volumes accounting for 280 million tonnes of goods. At 239 million tonnes, inland shipping had a 6% share in transport volume of the various modes of transport. Among the German ports, Hamburg is by far the most important handling port for shipping goods, while in inland shipping Duisburg can be highlighted as a major link to the so-called ARA ports (Amsterdam, Rotterdam and Antwerp).

The transport of crude oil in pipelines (96 million tonnes) and air freight (3 million tonnes) only played a subordinate role in the volume of goods transport, with a share of 2.4% and 0.1% respectively.

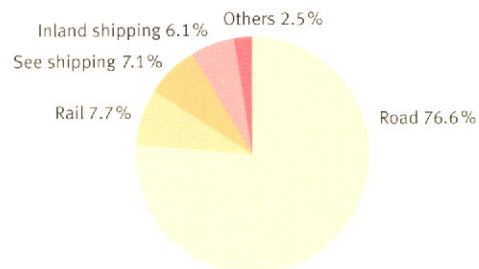
Growth in passenger transport

Roughly 10 billion journeys were made by regular local transport in 2005 by bus and rail, 1% more than in the previous year. Long-distance rail transport was also used somewhat more frequently by travellers (0.5%), with 116 million journeys, than in the previous year. Travel by plane was particularly popular in 2005: Passenger transport by air grew by 7%, with 147 million passengers.

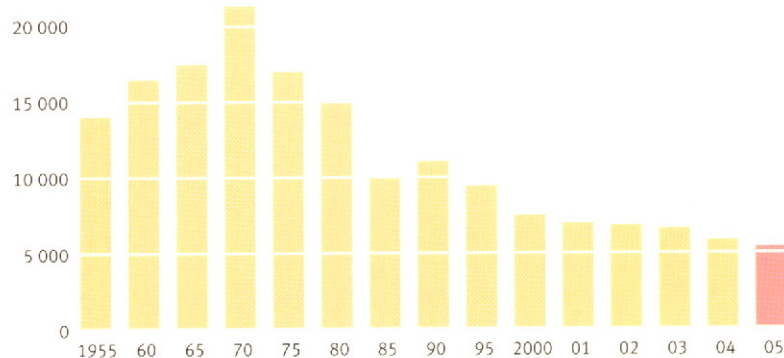
Persistently low number of road deaths

5,400 persons were killed by road traffic accidents in Germany in 2005, 8% fewer than in the previous year. The number of road deaths has been falling continually since 1970, when almost four times as many people died. Nonetheless, roughly 434,000 road users were injured in road accidents in 2005, only 1% fewer than in the previous year.

Sub-division of goods transport (modal split) (By transport volumes 2005)



Road deaths



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