Sectors at a Glance: G20

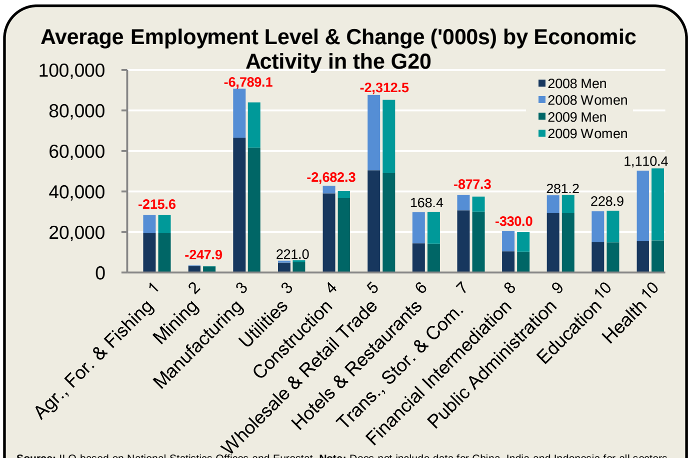
Recovery from the Global Economic Crisis

International Labour Office

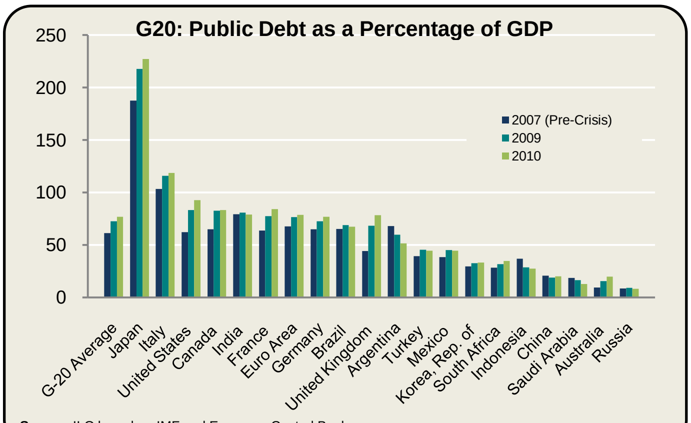
An uneven and contrasting recovery. Despite decisive policy measures and the turn in the inventory cycle, the recovery in advanced G20 economies has been slow and fragile. In contrast strong domestic demand, improvement in global trade and higher commodity prices appear to be the foundations for a robust recovery in emerging Asian and some Latin American economies. Nevertheless, the recovery across sectors is lagging in a number of economies. In the aggregate, manufacturing, construction and wholesale & retail trade continued to lose jobs in 2009. The pace of job losses slowed in financial intermediation and mining where jobs remain below pre-crisis peaks, while employment grew in education and health. Trends in agriculture and hotels & restaurants are mixed. Recent data also suggests that hours of work are gradually returning to previous levels, signalling an overall improvement in economic activity and cautiousness by employers in re-hiring.

Source: ILO based on National Statistics Offices and OECD Quarterly National Accounts. *Data not included for China, India, Indonesia and Saudi Arabia. **Note:** GDP Growth Rate represents the average growth rate for selected economies. Total employment refers to aggregate employment levels for all sectors of the economy.

The speed and level of the recovery varies across sectors and countries. In ***manufacturing*** – the hardest hit economic activity, employment remains subdued despite a broad expansion in production and orders since Q2 2009. A few economies, Mexico, Japan, Korea, Turkey and Indonesia reported a bounce in job creation over the same period boosted by improved exports. In contrast, employment continued to decline in the EU, U.S. and Russia, albeit at a slower pace. In the EU only Germany has started to add jobs in this sector. The rebound of global trade is slowly translating into jobs in ***transportation, storage & communication***. Employment levels are recuperating in Mexico, Turkey, Australia and Japan, while layoffs in the rest of the G20 continued to climb in 2009. Troubled trade links within the euro area and the euro's intermittent appreciation seemed to have curbed exports in the EU. In key labour intensive sectors the jobs recovery remains mixed.



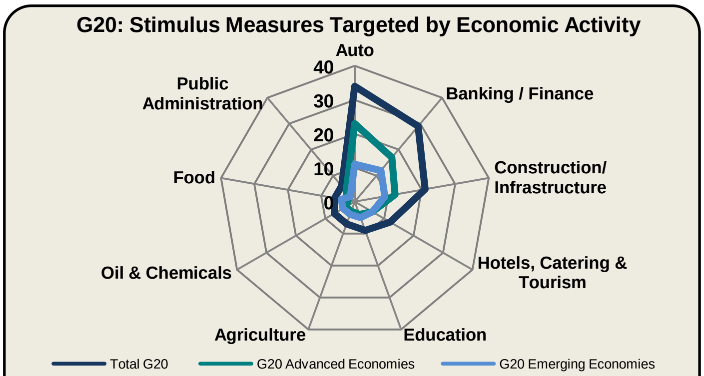
Source: ILO based on National Statistics Offices and Eurostat. **Note:** Does not include data for China, India and Indonesia for all sectors. [1]Also does not include Brazil, Canada and United States. [2]Also does not include Brazil, Japan, Mexico and Saudi Arabia. [3]Also does not include Brazil and Saudi Arabia. [4]Also does not include Rep. of Korea. [5]Also does not include Rep. of Korea and Turkey. [6]Also does not include Brazil, Rep. of Korea, South Africa and Turkey. [7]Also does not include Brazil and Rep. of Korea. [8]Also does not include Brazil, Rep. of Korea, Mexico and Turkey. [9]Also does not include Argentina, Brazil, Rep. of Korea, South Africa and Turkey. [10]Also does not include Argentina, Brazil, Rep. of Korea, Mexico, South Africa and Turkey.



Source: ILO based on IMF and European Central Bank.

The services sector exhibited renewed strength and narrowed the growth differential with respect to manufacturing. Jobs in ***wholesale & retail trade*** rose consistently in Brazil, Indonesia and Mexico. Since Q3 2009, signs of recovery also began in Australia, Canada and South Africa. Women and temporary workers appear to be the first to get their jobs back. However, weak household spending continued to hold back the job recovery in the EU, U.S. and Japan. Retail sales and car registrations continued a downward trend in the U.S. and E.U despite a slight recovery in the low price segment in early 2010, confirming the temporary effect of government subsidies to this industry. A continuing contraction of private investment in the ***construction sector,*** particularly in non-residential real estate, is driving low employment levels in Argentina, Russia, U.S., and the EU. Conversely, investments in public infrastructure and housing helped to sustain job growth in Brazil, China and Saudi Arabia.

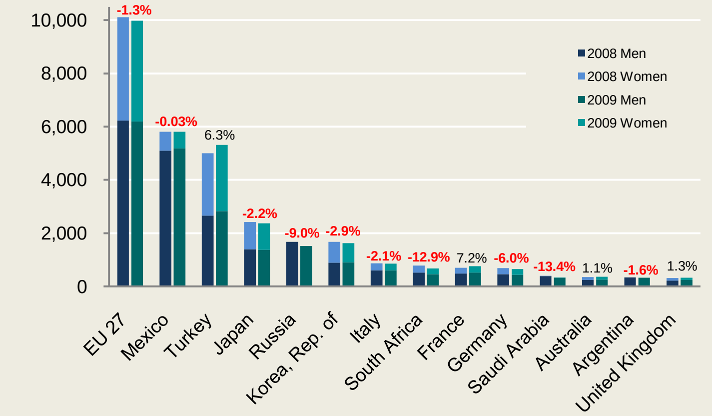
High debt ratios and fiscal vulnerability increase challenges for jobs recovery, particularly in public services where recent evidence suggests that jobs, wages and pensions could be affected in a number of advanced countries. After growing consistently in previous quarters, jobs in ***public administration*** began to decline in Q3 2009 most notably in the U.K, France and Italy, signalling the beginning of policy interventions to reduce public debt. Measures to bring stability to public finances may also have implications in social investment and public works, thus reversing the upward employment trends seen even before the crisis in health and education. Adjustments are likely to affect working conditions and other operating costs in the mid-term. Overall financial and economic conditions remain difficult and volatile. A disorderly correction of global imbalances may compromise growth and employment recovery prospects. Measures aimed at containing risks related to sovereign debt in fiscally vulnerable economies could prompt a premature withdrawal of fiscal stimulus, thus undermining the early gains of the recovery.



Source: ILO based on National Stimulus Plans. **Note:** Advanced Economies include Australia, Canada, France, Germany, Italy, Japan, Rep. of Korea, United Kingdom and United States. Emerging Economies include Argentina, Brazil, China, India, Indonesia, Mexico, Russia, Saudi Arabia, South Africa and Turkey.

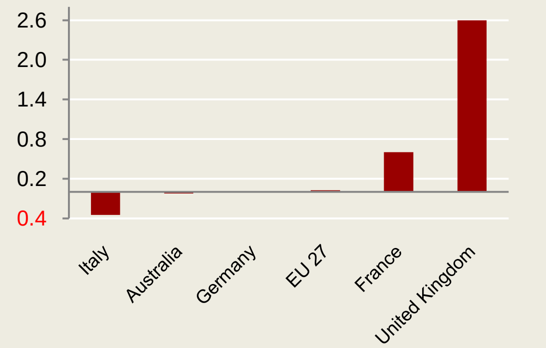
Agriculture, Forestry & Fishing

Average Employment Level by Sex ('000s) & Percentage Change



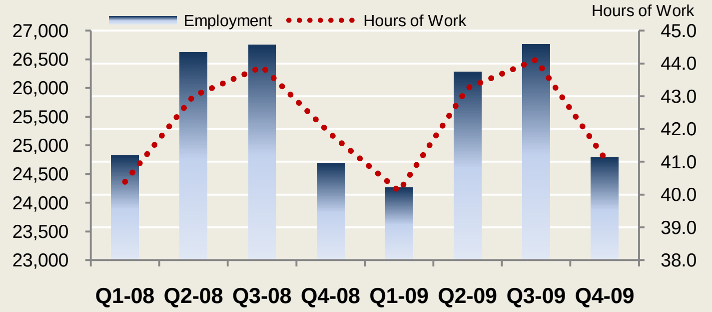
Source: ILO based on National Statistics Offices and Eurostat. Data for Russia and Argentina not available by sex.

Weekly Hours of Work: Change 2008 to 2009



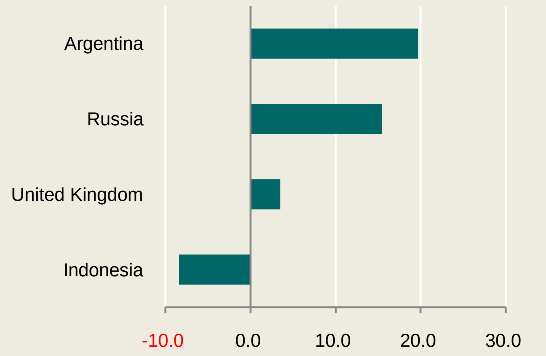
Source: ILO based on National Statistics Offices and Eurostat.

Employment Level ('000s) & Average Weekly Hours of Work



Source: ILO based on National Statistics Offices and Eurostat. Selected economies include: Argentina, Australia, EU 27 members, Japan, Rep. of Korea, Mexico, Russia, South Africa and Turkey.

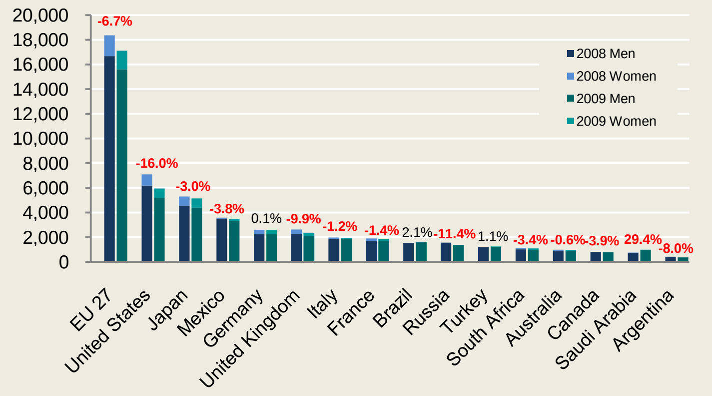
Percentage Change in Average Wage 2008 to 2009



Source: ILO based on National Statistics Offices.

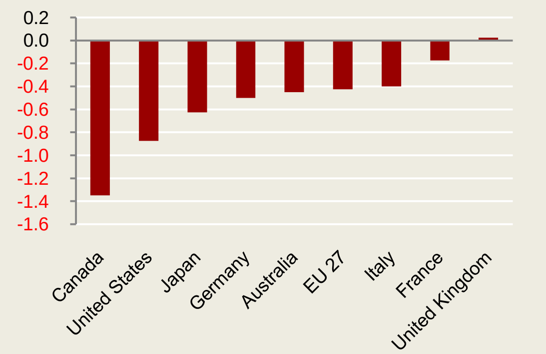
Construction

Average Employment Level by Sex ('000s) & Percentage Change



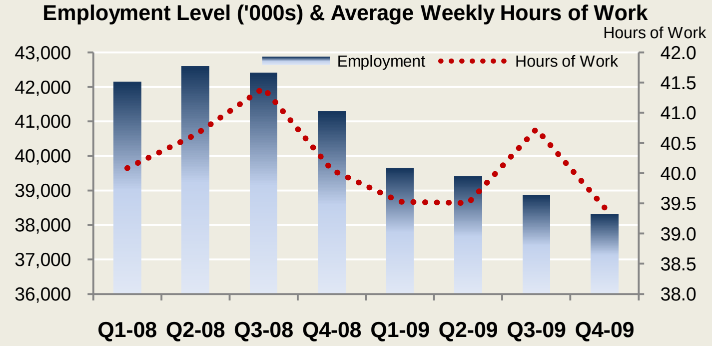
Source: ILO based on National Statistics Offices and Eurostat. Data for Argentina, Brazil, Canada and Russia not available by sex.

Weekly Hours of Work: Change 2008 to 2009



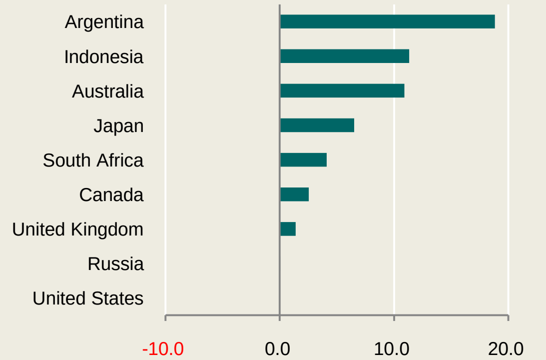
Source: ILO based on National Statistics Offices and Eurostat.

Employment Level ('000s) & Average Weekly Hours of Work



Source: ILO based on National Statistics Offices and Eurostat. Selected economies include: Argentina, Australia, Brazil, Canada, EU 27 members, Japan, Mexico,Russia, South Africa, Turkey and United States.

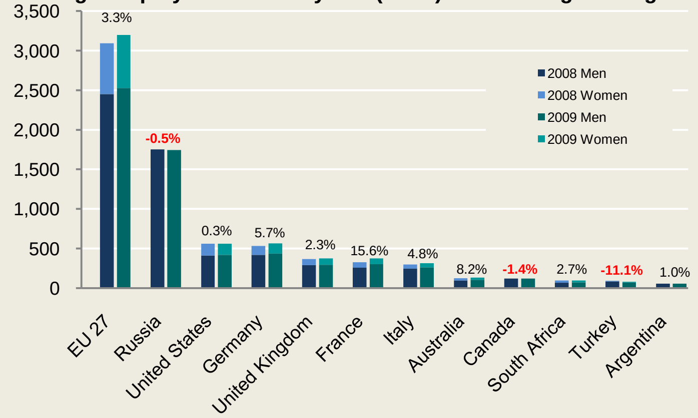
Percentage Change in Average Wage 2008 to 2009



Source: ILO based on National Statistics Offices.

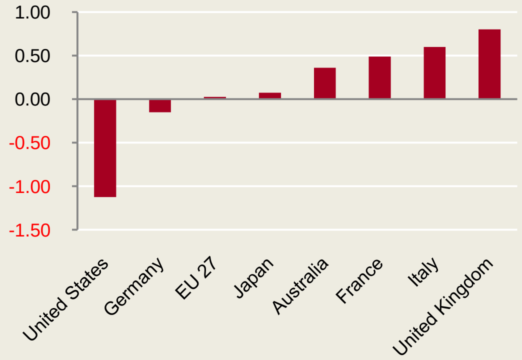
Utilities

Average Employment Level by Sex ('000s) & Percentage Change



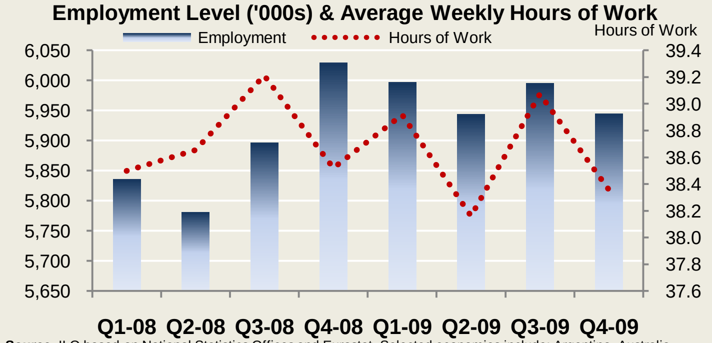
Source: ILO based on National Statistics Offices and Eurostat. Data for Argentina, Canada and Russia not available by sex.

Weekly Hours of Work: Change 2008 to 2009



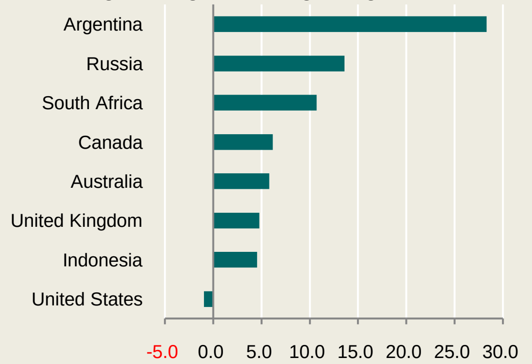
Source: ILO based on National Statistics Offices and Eurostat.

Employment Level ('000s) & Average Weekly Hours of Work



Source: ILO based on National Statistics Offices and Eurostat. Selected economies include: Argentina, Australia, Canada, EU 27 members, Japan, Rep. of Korea, Mexico,Russia, South Africa, Turkey and United States.

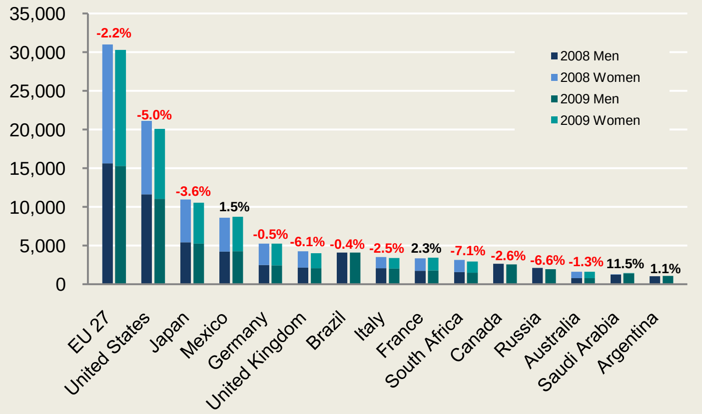
Percentage Change in Average Wage 2008 to 2009



Source: ILO based on National Statistics Offices.

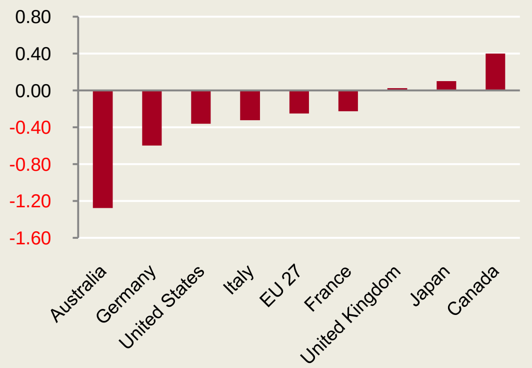
Wholesale & Retail Trade

Average Employment Level by Sex ('000s) & Percentage Change



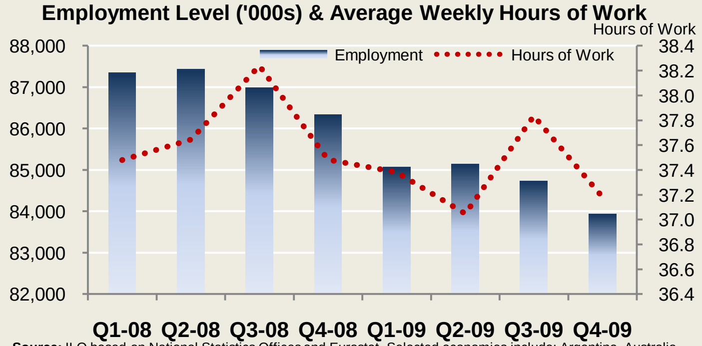
Source: ILO based on National Statistics Offices and Eurostat. Data for Argentina, Brazil, Canada and Russia not available by sex.

Weekly Hours of Work: Change 2008 to 2009



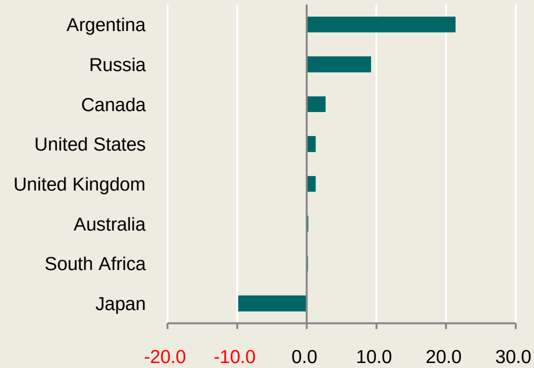
Source: ILO based on National Statistics Offices and Eurostat.

Employment Level ('000s) & Average Weekly Hours of Work



Source: ILO based on National Statistics Offices and Eurostat. Selected economies include: Argentina, Australia, Brazil, Canada, EU 27 members, Japan, Mexico,Russia, South Africa and United States.

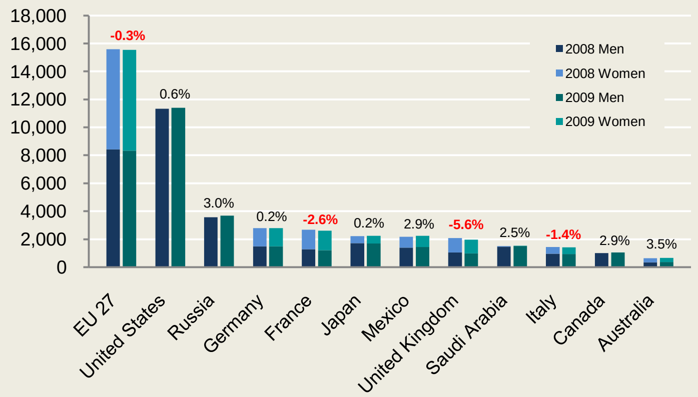
Percentage Change in Average Wage 2008 to 2009



Source: ILO based on National Statistics Offices.

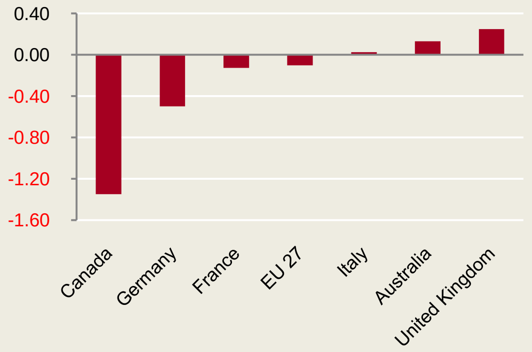
Public Administration

Average Employment Level by Sex ('000s) & Percentage Change



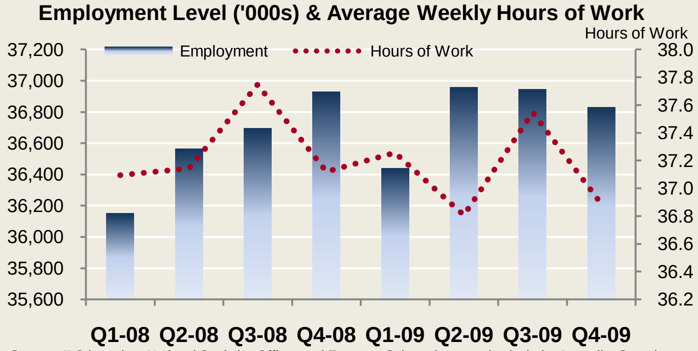
Source: ILO based on National Statistics Offices and Eurostat. Data for Canada, Russia and United States not available by sex.

Weekly Hours of Work: Change 2008 to 2009



Source: ILO based on National Statistics Offices and Eurostat.

Employment Level ('000s) & Average Weekly Hours of Work



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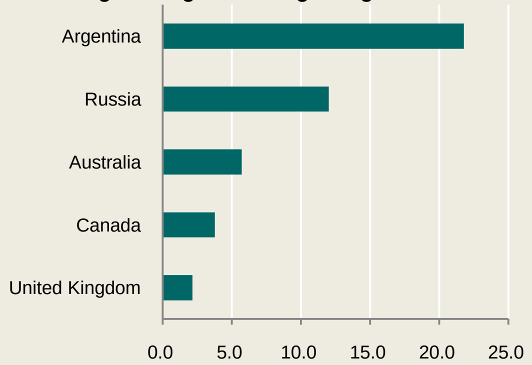
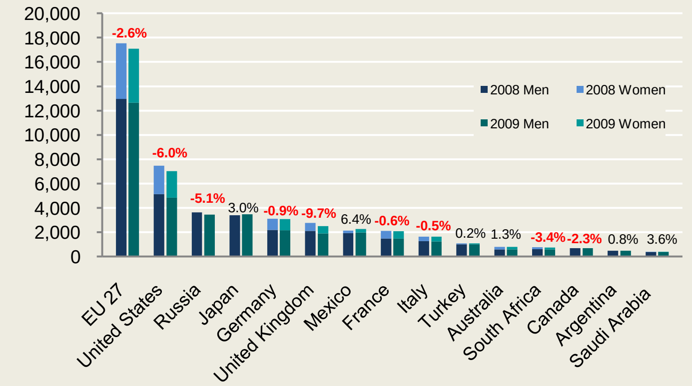
Percentage Change in Average Wage 2008 to 2009



Source: ILO based on National Statistics Offices.

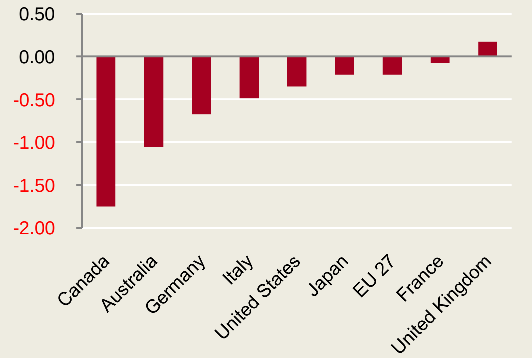
Transportation, Storage & Communication

Average Employment Level by Sex ('000s) & Percentage Change



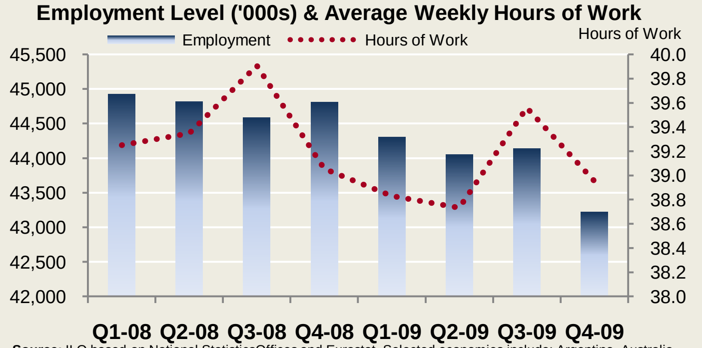
Source: ILO based on National Statistics Offices and Eurostat. Data for Argentina, Canada, Japan and Russia not available by sex.

Weekly Hours of Work: Change 2008 to 2009



Source: ILO based on National Statistics Offices and Eurostat.

Employment Level ('000s) & Average Weekly Hours of Work



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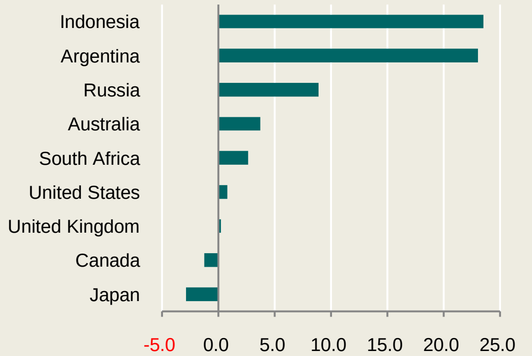
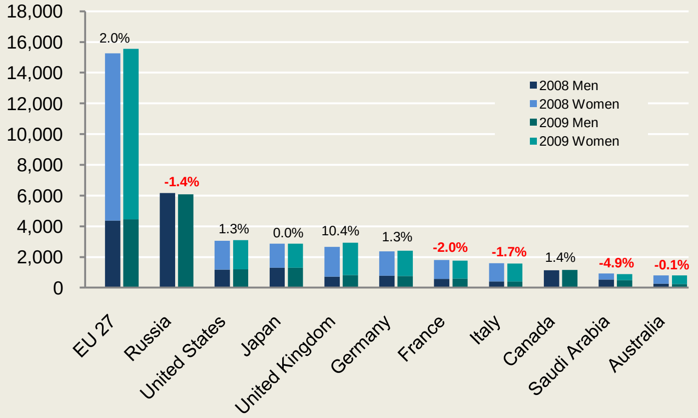
Percentage Change in Average Wage 2008 to 2009



Source: ILO based on National Statistics Offices.

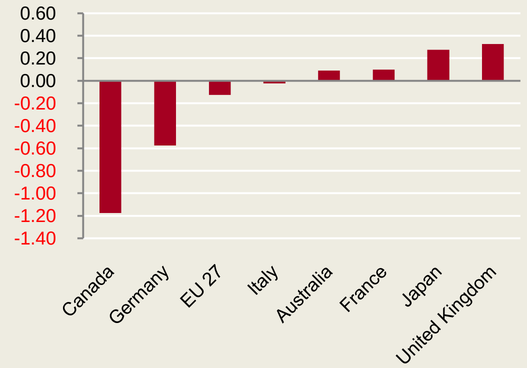
Education

Average Employment Level by Sex ('000s) & Percentage Change



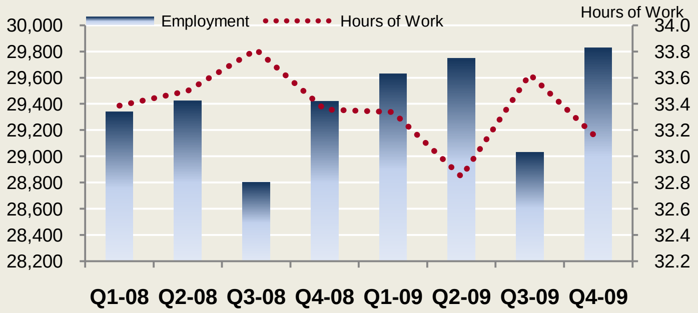
Source: ILO based on National Statistics Offices and Eurostat. Data for Canada and Russia not available by sex.

Weekly Hours of Work: Change 2008 to 2009



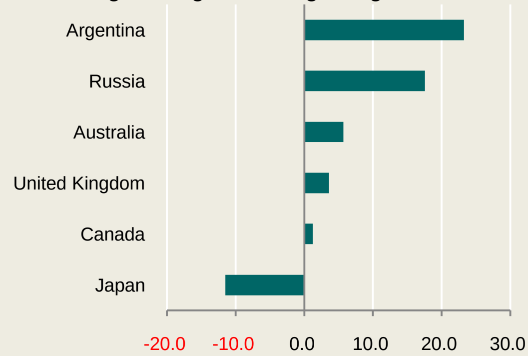
Source: ILO based on National Statistics Offices and Eurostat.

Employment Level ('000s) & Average Weekly Hours of Work



Source: ILO based on National Statistics Offices and Eurostat. Selected economies include: Australia, Canada, EU 27 members, Japan, Russia and United States.

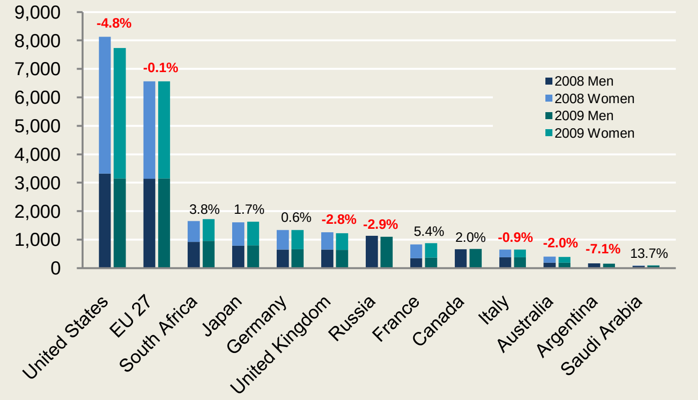
Percentage Change in Average Wage 2008 to 2009



Source: ILO based on National Statistics Offices.

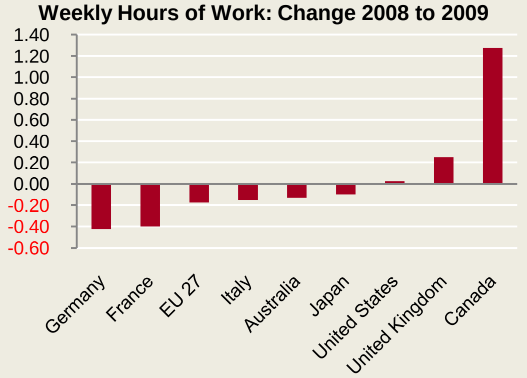
Financial Intermediation

Average Employment Level by Sex ('000s) & Percentage Change



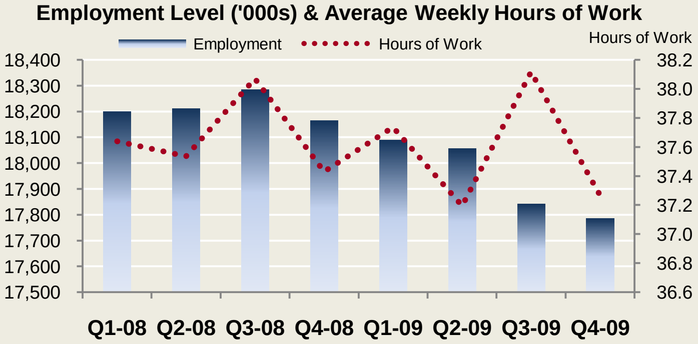
Source: ILO based on National Statistics Offices and Eurostat. Data for Argentina, Canada and Russia not available by sex.

Weekly Hours of Work: Change 2008 to 2009



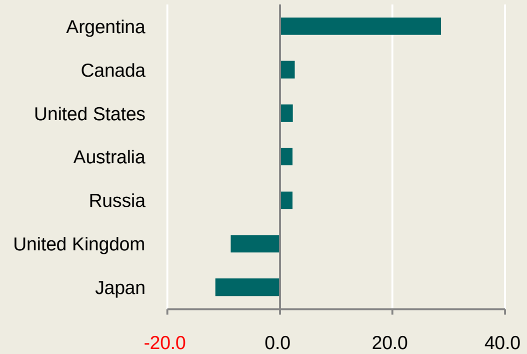
Source: ILO based on National Statistics Offices and Eurostat.

Employment Level ('000s) & Average Weekly Hours of Work



Source: ILO based on National Statistics Offices and Eurostat. Selected economies include: Argentina Australia, Canada, EU 27 members, Japan, Russia, South Africa and United States.

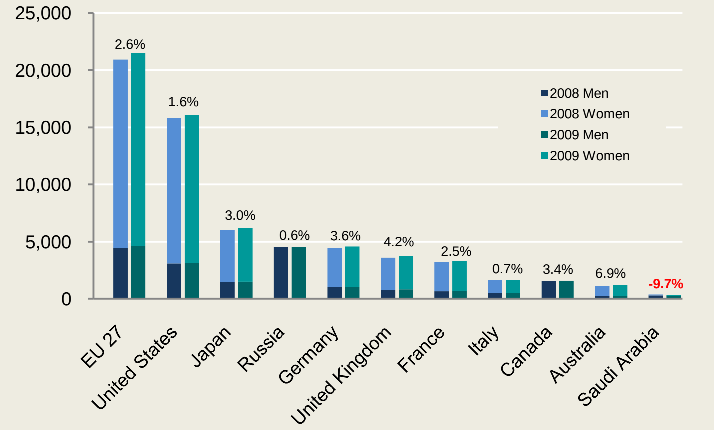
Percentage Change in Average Wage 2008 to 2009



Source: ILO based on National Statistics Offices.

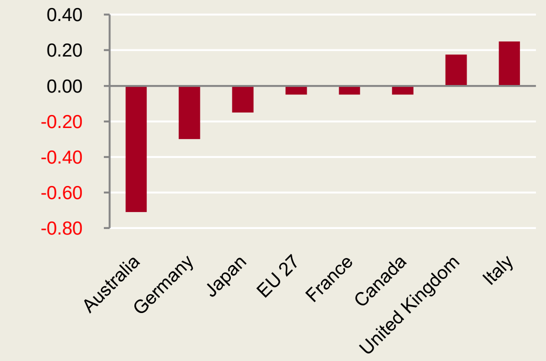
Health

Average Employment Level by Sex ('000s) & Percentage Change



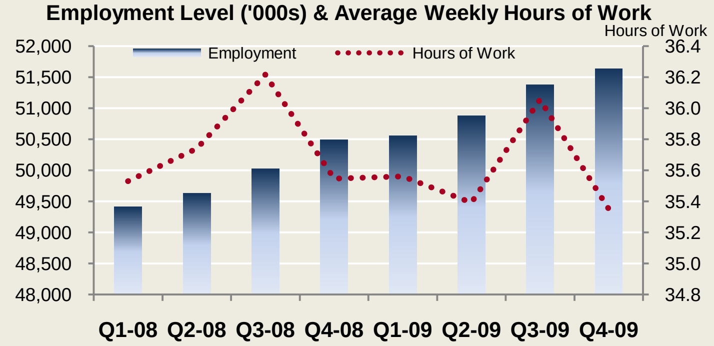
Source: ILO based on National Statistics Offices and Eurostat. Data for Canada and Russia not available by sex.

Weekly Hours of Work: Change 2008 to 2009



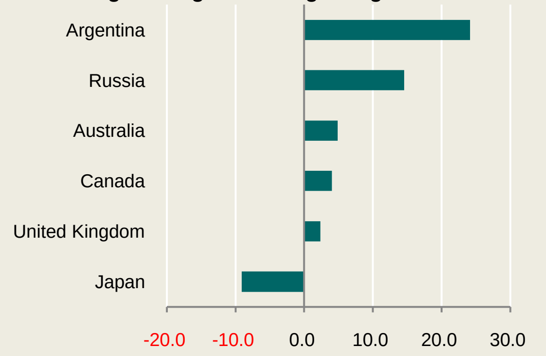
Source: ILO based on National Statistics Offices and Eurostat.

Employment Level ('000s) & Average Weekly Hours of Work



Source: ILO based on National Statistics Offices and Eurostat. Selected economies include: Australia, Canada, EU 27 members, Japan, Russia and United States.

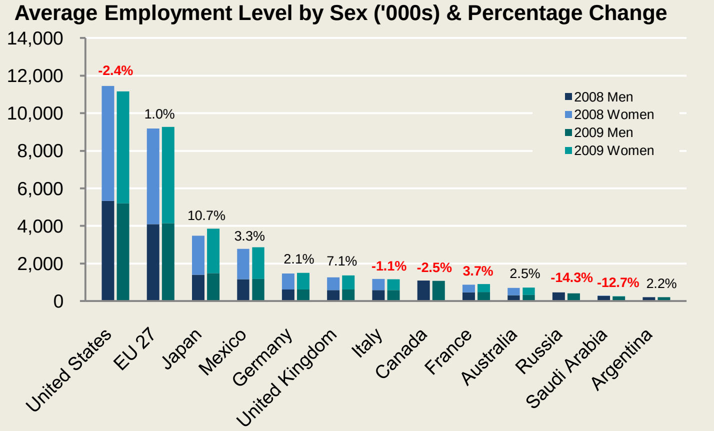
Percentage Change in Average Wage 2008 to 2009



Source: ILO based on National Statistics Offices.

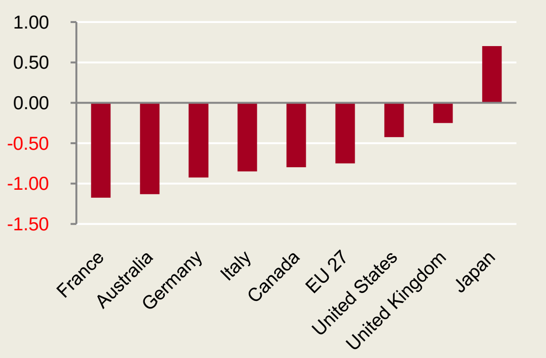
Hotels & Restaurants

Average Employment Level by Sex ('000s) & Percentage Change



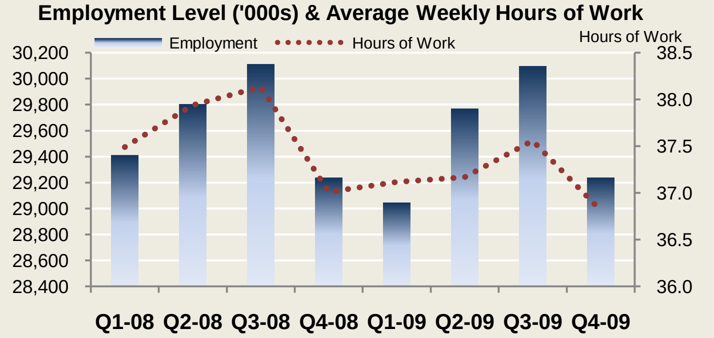
Source: ILO based on National Statistics Offices and Eurostat. Data for Argentina, Canada and Russia not available by sex.

Weekly Hours of Work: Change 2008 to 2009



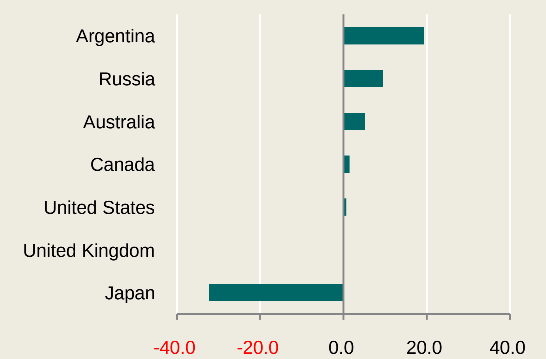
Source: ILO based on National Statistics Offices and Eurostat.

Employment Level ('000s) & Average Weekly Hours of Work



Source: ILO based on National Statistics Offices and Eurostat. Selected economies include: Argentina, Australia, Canada, EU 27 members, Japan, Mexico,Russia and United States.

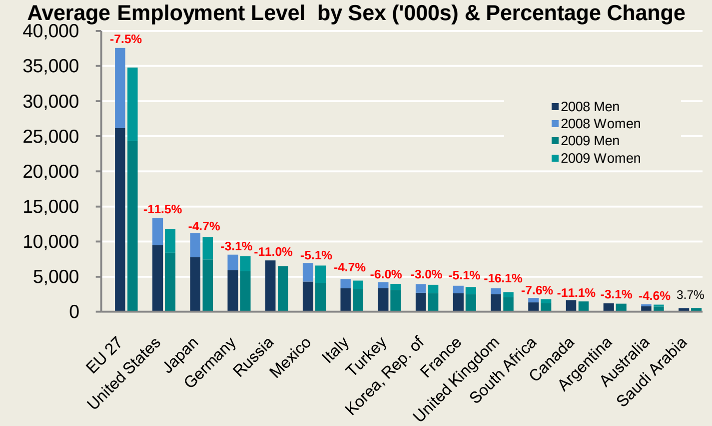
Percentage Change in Average Wage 2008 to 2009



Source: ILO based on National Statistics Offices.

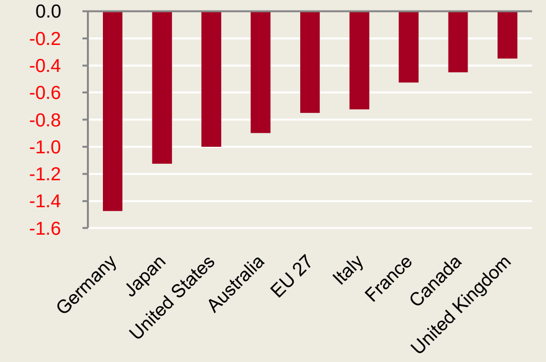
Manufacturing

Average Employment Level by Sex ('000s) & Percentage Change



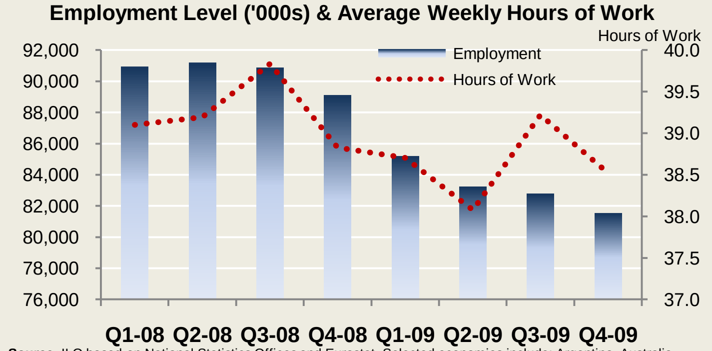
Source: ILO based on National Statistics Offices and Eurostat. Data for Argentina, Canada and Russia not available by sex.

Weekly Hours of Work: Change 2008 to 2009



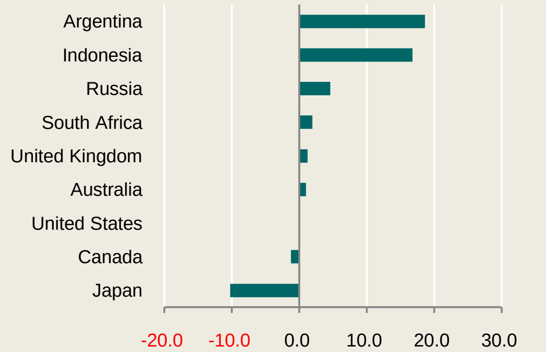
Source: ILO based on National Statistics Offices and Eurostat.

Employment Level ('000s) & Average Weekly Hours of Work



Source: ILO based on National Statistics Offices and Eurostat. Selected economies include: Argentina, Australia, Canada, EU 27 members, Japan, Rep. of Korea, Mexico, Russia, South Africa, Turkey and United States.

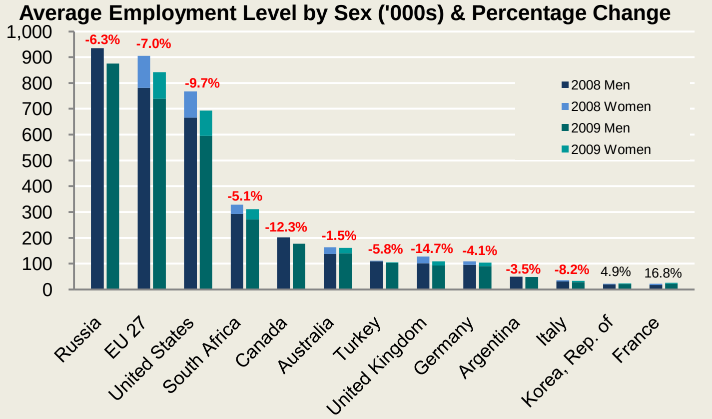
Percentage Change in Average Wage 2008 to 2009



Source: ILO based on National Statistics Offices.

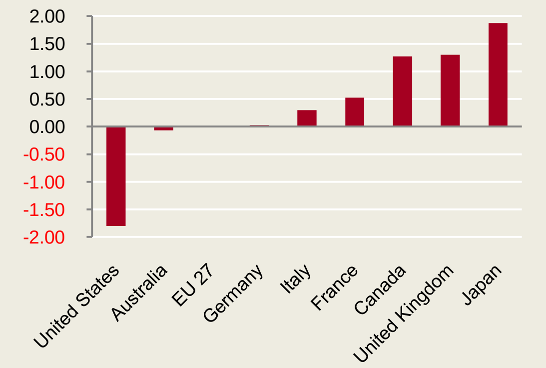
Mining

Average Employment Level by Sex ('000s) & Percentage Change



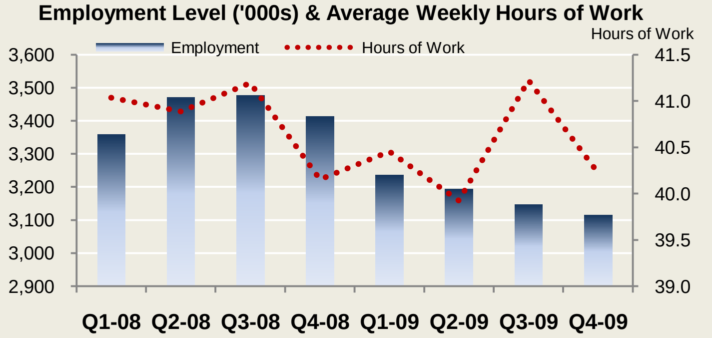
Source: ILO based on National Statistics Offices and Eurostat. Data for Argentina, Canada and Russia not available by sex.

Weekly Hours of Work: Change 2008 to 2009



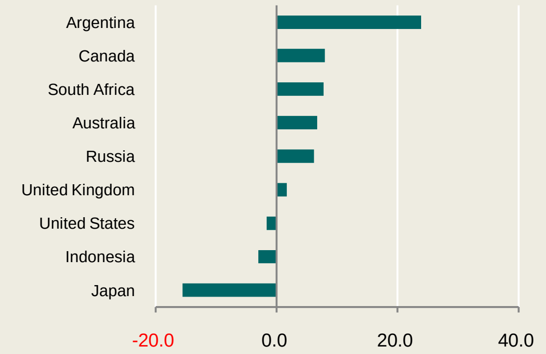
Source: ILO based on National Statistics Offices and Eurostat.

Employment Level ('000s) & Average Weekly Hours of Work



Source: ILO based on National Statistics Offices and Eurostat. Selected economies include: Argentina, Australia, Canada, EU 27 members, Rep. of Korea, Russia, South Africa, Turkey and United States.

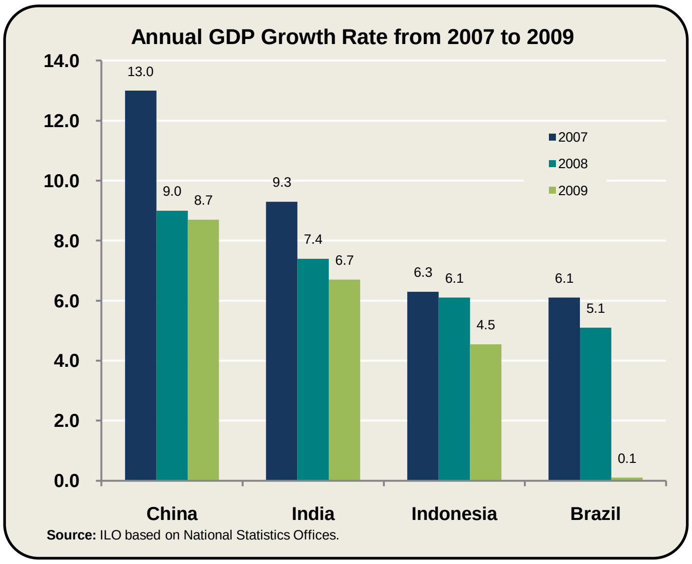
Percentage Change in Average Wage 2008 to 2009



Source: ILO based on National Statistics Offices.

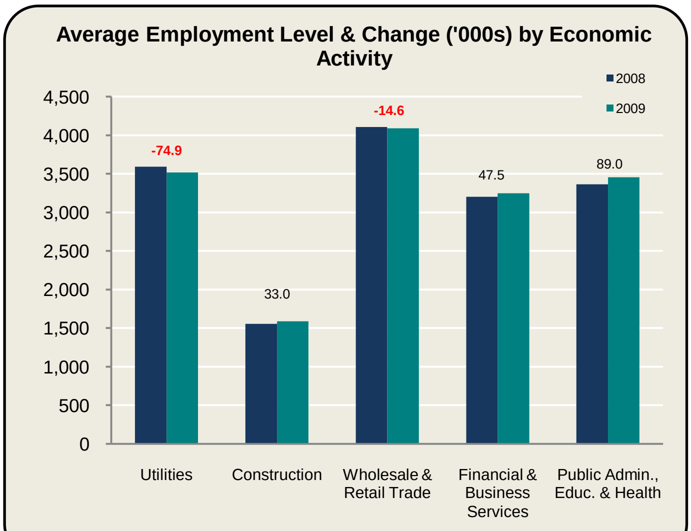
G20 Emerging Economies

Emerging and export oriented economies are driving the recovery. In contrast to advanced economies, the recovery in Asian and some Latin American G20 emerging economies came faster and is more solidly sustained by private demand and external capital inflows. Job losses across sectors were more moderate than in other regions and responded sharply to improvements in overall economic activity. Lower public debt levels allowed many economies to implement strong and timely countercyclical policy responses to the crisis benefiting among others, mining, tourism and textiles. China has emerged as the biggest manufacturing country, but consolidation at industry level may still lead to job losses in the mid-term. Planning the speed and sequencing the exit from extraordinary stimulus measures may become a priority for policymakers in 2010-2011. Although signs of overheating and inflationary pressures have started to build up slowly in economies such as China and India, and to a lesser extent in Brazil, the recovery risks for emerging G20 economies are broadly in balance and depend mostly on external factors such as the fragility of the recovery in advanced economies and potential weakness in commodity prices. In the mid-term labour market challenges across sectors remain in structural aspects such as improving working conditions, stabilizing social protection schemes, expanding social dialogue and tackling informality.



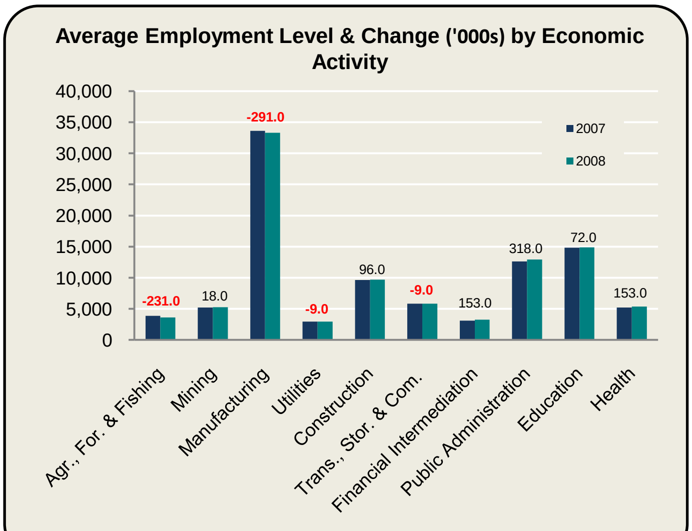
Source: ILO based on National Statistics Offices.

BRAZIL



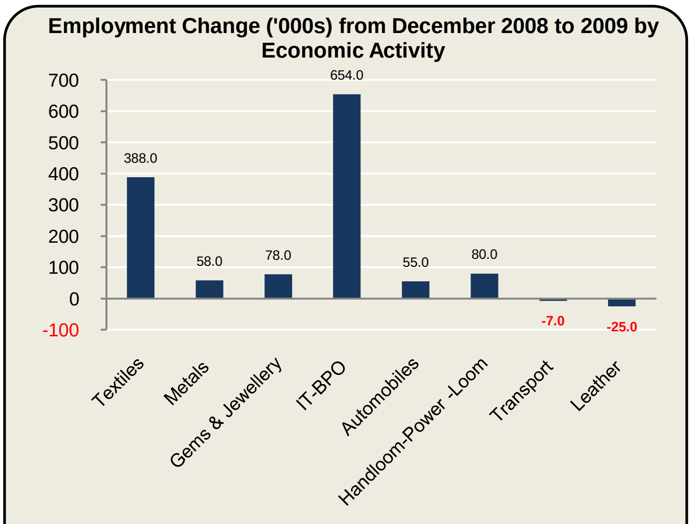
Source: ILO based on IBGE, Pesquisa Mensal de Emprego.

CHINA



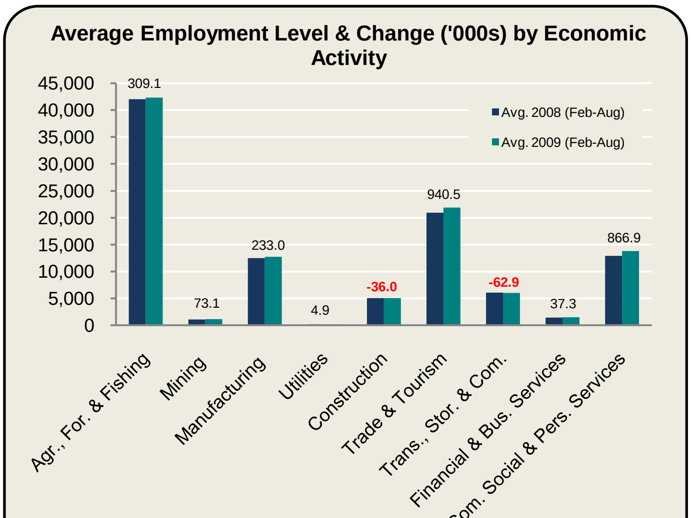
Source: ILO based on China National Bureau of Statistics. Includes Urban Units only.

INDIA



Source: ILO based on Government of India, Ministry of Labour & Employment.

INDONESIA



Source: ILO based on Statistics Indonesia, BPS.