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Distributive trades in Europe

Data 1995-97

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THEME 4
Industry, trade and services

The activity of distributive trades is made up of just under 5 million enterprises within the European Union, equivalent to over one third of the total business enterprise population. With such a large share of the total, it is not surprising that the most prevalent form of enterprise within this particular activity is small and medium-sized enterprises.

The distributive trades' sector of the economy accounts for almost 13% of total value added created within the European Union. The sector has an important role to play in terms of employment, with more than 22 million persons employed in 1998. Indeed, the sector managed to preserve and increase the total number of persons employed during the last ten years, whilst many other areas of the economy recorded (sometimes significant) reductions in employment levels.

The figures above show the importance of the distributive trades activity within the Member States of the European Union. Nevertheless, until recently distributive trades have been afforded little policy attention within the European institutions or most national administrations. Indeed, it may be argued that the activity was not given the consideration that its economic weight merited. This was partly due to the fact that service sector statistics are not as fully developed as those for other areas of the economy (namely detailed data for traditional activities such as manufacturing or agriculture). However, the introduction of Council Regulation (EC, Euratom) No. 58/97 of 20th December 1996 concerning structural business statistics (the SBS Regulation) redressed somewhat this situation. The Regulation includes a special annex devoted solely to measuring the development and performance of the activity of commerce (Annex 3). Indeed, "the aim of this Annex is to establish a common framework for the collection, compilation, transmission and evaluation of Community statistics on the structure, activity, competitiveness and performance of the distributive trade sector". Almost all Member States have now provided data for reference years 1995 and 1996. As the SBS Regulation is fully implemented across all Member States (during the next couple of years) one may hope for a detailed set of structural data to be provided within eighteen months of the reference period.

The White Paper on Commerce adopted on the 27th January 1999 is another example of the increasing importance being afforded to distributive trades. This White Paper reinforces the claim that the Commission is devoting increased resources to this sector of the economy and wishes to follow its economic development at a much closer level of detail. The White Paper proposes four priority actions: to improve the use of policy instruments; to improve administrative, legislative and financial instruments; to strengthen competitiveness and promote entrepreneurship; and to encourage the europeanisation and internationalisation of the sector.

There are a number of challenges that need to be faced by the distributive trades' sector of the economy in the next few years, they include:

- the enlargement of the EU to include the Central European Countries (CEC's);
- the change in the structure and conduct of enterprises operating within the industry (notably the increase in the levels of concentration within food retailing);
- the relocation of retail outlets from town centres towards out-of-town shopping areas;
- the introduction of the euro;
- and the growing importance of electronic commerce.

All of these areas are covered by the analytical text that is supplemented by the inclusion of supporting data. The majority of data is provided through official data collection taking place within the Member States and co-ordinated by Eurostat. The first results of the SBS Regulation are clearly evident, as there has been a wide-ranging improvement in both the activity detail presented and the number of structural variables covered with respect to previous distributive trade publications.

This publication also allows the opportunity to draw the reader's attention to the development of a multi-source approach, forming the basis of several annual Eurostat publications (notably within the field of the Business Statistics Directorate). Rather than simply use data from the SBS Regulation, you will also find data from National Accounts, the Labour Force Survey and the Labour Cost Survey amongst others. The use of such a wide array of sources is in response to user needs. Indeed, decision-makers not only need information on the economic agents (enterprises) that form the basis of the productive capacity of an activity, they also need information on the structure that these enterprises take. This may be data on the structure and performance of small, medium and large-sized enterprises or data relating to employment issues, for example, the number of females employed and the degree of part-time work within a given activity. Indeed, there is a clear need for information on labour markets to help redress the unemployment problem that has persisted over recent years within Europe.

With such a broad array of labour-related indicators, coupled with the more traditional structural variables, we are able to present a very detailed picture of the developments within "Distributive trades in Europe". It is to be hoped that this publication, the result of work carried out jointly by Eurostat and DG XXIII, meets the needs of professionals, academics, entrepreneurs, as well as policy makers. This publication has been made possible by the co-operation that Eurostat have received not only from the national statistical offices of the European Economic Area, but also the CEC's (Central European Countries).

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Distributive trades in Europe, 1999
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A great deal of additional information on the European Union is available on the Internet. It can be accessed through the Europa server at http://europa.eu.int

Aims of this publication

It is hoped that the "Distributive trades in Europe" publication will be released on an annual basis. There are a number of key reasons why this publication has been set-up. The White Paper on Commerce released in January 1999, called for a higher profile and greater awareness of the activity of distributive trades. One of the main objectives of the White Paper was to improve recognition of the sector by "putting commerce on the map". We would hope that an annual publication on distributive trades goes some way towards fulfilling the need for increased information both for decision makers and for analysts who are interested in the activity (within administration, businesses and their associations). Such information could prove a useful source for small and medium-sized enterprises. Often these enterprises are unable to devote resources to specific research or consultancy work. We hope that this publication may be able to provide such economic players with useful information relating to both market structure and labour related issues, both in their domestic market, as well as in other European countries. Indeed, one of the main aims of the White Paper is to improve the competitiveness of the sector, in particular of small and medium-sized enterprises.

Eurostat are currently trying to develop a new approach for analysis-based publications, which we may term a "multi-source" approach. The main idea is to publish, for a given topic, a number of related data sets coming from different Directorates within Eurostat. This publication combines information from National Accounts, through Business Statistics to data on population and social conditions.

Another aim of this publication is to respond to the internal needs of the Commission, where increased information is required for policy initiatives. The information of use internally within the Commission may also prove valuable for other policy makers and actors within the educational communily, administration and government.

The implementation of the Council Regulation No. 58/97 concerning structural business statistics has improved greatly the information that is available on distributive trade. This information is indeed subject of a specific annex within the Regulation (Annex 3). Data has been provided by the majority of Member States and the collection of harmonised series began in reference year 1995. At the time of writing many countries were processing their data for 1997. The data received from the Regulation forms the basis of much of the analysis and information presented within this publication. Indeed, the database component of the CD-ROM version of this publication provides the user with an application that presents the full set of figures collected for distributive trades between 1995 and 1997. This data is often at a more detailed level than that provided within the paper publication. Most sections of the economic analysis and tables are based on data collected in April 1999, whilst the SBS analysis is based on an an extraction made in August 1999.

"Distributive trades in Europe" should be seen as part of a family of business statistics products that are structured in a hierarchical fashion following the economic activity classification used in the collection of business statistics (NACE Rev. 1). The Eurostat publications' programme identifies nine themes for classifying information. Theme 4 provides users with information relating to industry, trade and services. The generalist may be content with Eurostat publications such as the "Panorama of European Business", that give information on all industrial and service activities. A somewhat more detailed analysis of the service sector is provided within the publication "Services in Europe". However, descending even further into the detailed hierarchy, we arrive at "Distributive trades in Europe".

Contents of this publication

The majority of the data presented both within the paper publication and on the CD-ROM is taken from the SBS Regulation. This Regulation requires that Member States send information collected through annual surveys to Eurostat. The statistical classification of economic activities in the European Community (NACE Rev. 1) is used to classify this information. Distributive trades are classified under NACE Rev. 1 Section G as "wholesale and retail trade; repair of motor vehicles, motorcycles and personal and household goods". This publication uses the terms "distributive trades" and "commerce" freely to refer to the same concept, namely that of NACE Rev. 1 Section G. This Section of the NACE Rev. 1 classification may be divided into three separate Divisions, each of which also has an abbreviated form used within the analysis presented. These Divisions and abbreviated terms are as follows:

- NACE Rev. 1 50, "the sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel", also termed motor trade;
- NACE Rev. 1 51, "wholesale trade and commission trade, except of motor vehicles and motorcycles", also referred to as wholesale trade and;
- NACE Rev. 1 52, "retail trade, except of motor vehicles and motorcycles; repair of personal and household goods", often abbreviated to retail trade.

The content of this publication may be summarised as follows. The second chapter (2. structural analysis) looks at commerce from an international perspective. There are comparisons provided for Japan and the United States. Furthermore, data has also been collected from the remaining European Economic Area countries as well as those of central Europe (CECs). As such the collection of their data (following the same economic classification as that used in the Member States) is a useful start in helping to integrate commercial markets. A far greater amount of data on the EEA countries and CECs is available on the CD-ROM.

Commerce has seen its market structure alter at a rapid pace in recent years. These trends are outlined in depth within the third chapter (3. thematic analysis). Increased concentration and levels of competition have largely fuelled these changes. Economies of scale have led to increased market for the leading players in terms of both negotiating power and direct access to sales networks. The downside of such high levels of concentration are that ultimately there may be a restriction concerning product choice. Furthermore, a limited number of players will increase the possibility of price collusion, whilst at the same time reducing the accessibility and choice of retail locations. These issues are discussed within the analysis presented.

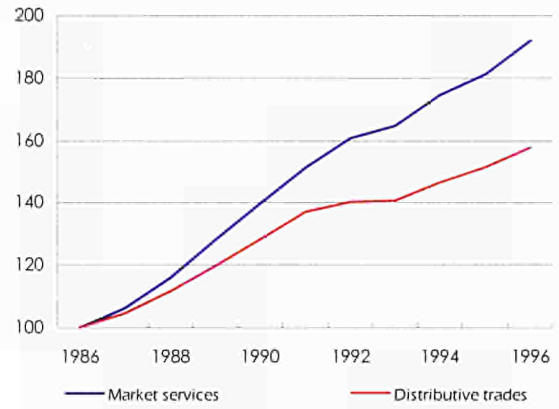
One of the main areas where there has been employment creation within the last decade in Europe is in the field of commerce. Most of these gains can be associated with increasing the customer-orientated content of the service provided by enterprises active within distributive trades. These issues are dealt with in the second part of the third chapter. This section studies the distributive trades' employment market, its characteristics and trends.

The fourth chapter (4. sectoral analysis) of this publication covers three sectoral breakdowns that are defined within the NACE Rev. 1 classification of economic activities. There are specific chapters on the activities of motor trade, wholesale trade and retail trade, where detailed information is presented in tables and graphics. Finally, a country chapter (5. country analysis) is provided, with a standard set of information presented in tables for European countries.

Main findings of this publication

The economic importance of distributive trades within the European economy can be witnessed by looking at a number of key indicators. National accounts data allow us to measure the size of distributive trades compared to the rest of the economy. In terms of wealth created, distributive trades have accounted for a fairly constant share of total value added in Europe during the past decade. We find that just under 13% of total EU value added was generated within this branch of the economy. Whilst the share of distributive trades in European value added has remained constant during the decade, many other market service activities have seen their shares of total value added expand, whilst more traditional sectors of the economy (agriculture, mining and industry) have seen a decline.

Figure 1.1
Trends in value added at factor cost in the EU (1) ——— (1986 = 100)



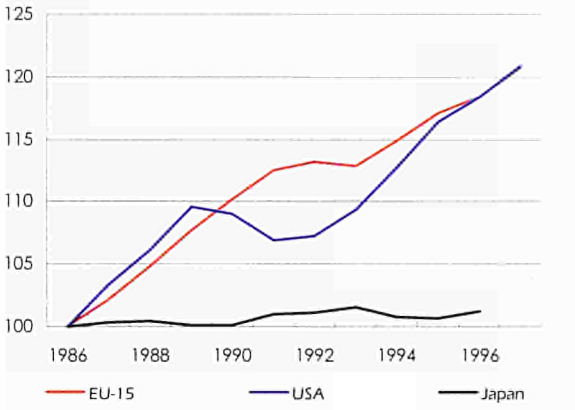
(1) Estimates for some countries.

Source: National Accounts

It is in terms of offering employment opportunities that distributive trade really comes into its own. Commerce accounts for more than 15% of the European workforce, offering jobs to a large number of persons seeking flexible work opportunities or employment opportunities that require little or no skills or qualifications. Employment within the distributive trades' branch of the EU accounted for more than 22 million persons.

The share of distributive trades in total employment has been rising in most European countries, although at a fairly slow pace. Indeed, there are other areas of the market services' economy that report more rapid job creation, such as financial intermediation and personal services. Four EU countries were however able to report that annual average growth rates for employment were in excess of 2% per annum (Greece, Luxembourg, the Netherlands and Spain).

Figure 1.2
Trends in employment in distributive trades ——— (1986 = 100)



Source: National Accounts

The share of the European labour force that is occupied within distributive trades is lower in Europe than in either Japan or the USA (both over 17% of total employment). Whilst the American labour force faces a fluctuating labour market (linked closely to general economic performance), in Europe the changes in employment levels are more static and respond slower and in a less volatile manner to underlying economic conditions.

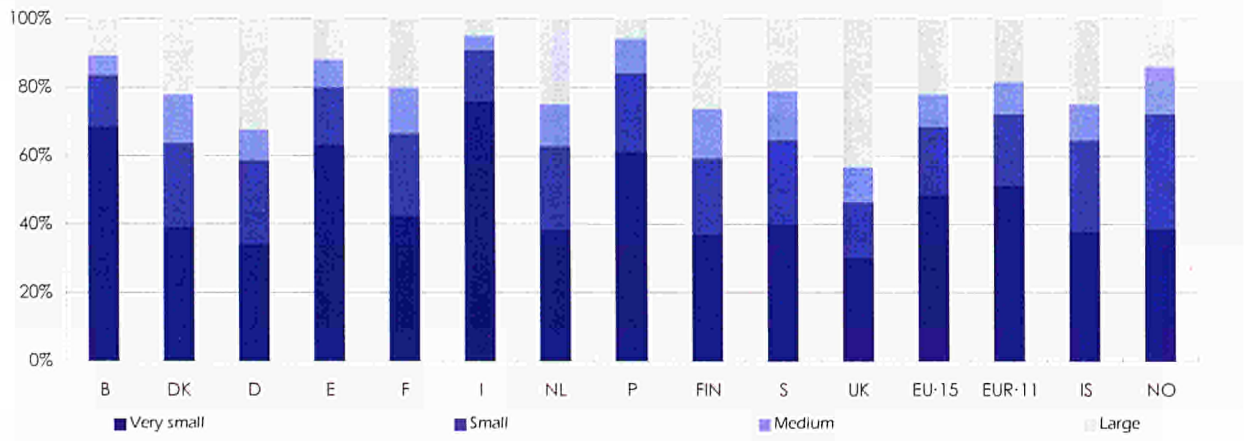
As well as offering a large number of employment opportunities, distributive trades also offer many opportunities for entrepreneurship. Given that the start-up costs in this branch of the economy are relatively low (compared to many other areas of the economy) it is not surprising to find that there were almost 5 million enterprises in the EU. Indeed, enterprises within distributive trades account for over one third of the total business enterprise population (industry, construction and market services). Distributive trades accounted for almost 50% of the market services' enterprise population in the EU.

The structure of enterprises varies to a far higher degree amongst countries. Indeed, there were more than one million enterprises active in distributive trades within Italy. Other countries with comparatively high numbers of enterprises compared to their populations included Belgium, Portugal and Spain (there was no data available for Greece, although estimates suggest the figure would be high). In these countries the role of small and medium-sized enterprises was particularly important. These four countries all reported that more than 60% of their employment was located within enterprises with nine or less employees. At the other end of the scale, Germany and the United Kingdom both reported that more than 30% of their workforce was employed within large enterprises, in other words, those enterprises employing 250 or more persons.

Turning our attention to the breakdown of the distributive trades' activity into the three Divisions of motor trade, wholesale trade and retail trade we find that by far the largest number of enterprises operate within retail trade. For example, in Italy some 56.5% of all distributive trades' enterprises were active in the retail trade sector. With such a high number of enterprises, it was not surprising to find that the density of retail trade enterprises was also high in Italy, where there were 124 retail enterprises per 10,000 inhabitants. Italy recorded the high enterprise density in the other two trade activities, with 64 wholesale enterprises and 29 motor trade enterprises per 10,000 inhabitants. The lowest levels of enterprise density were recorded in Germany and the United Kingdom, where there were less than 70 distributive trades' enterprises per 10,000 inhabitants.

Figure 1.3

Number of persons employed in distributive trades broken down by enterprise size class, 1995 (1) (% of total)



(1) Earlier years had to be used for some countries; very small (0-9 employees); small (10-49 employees); medium (50-249 employees; large (250 or more employees).

Source: SME

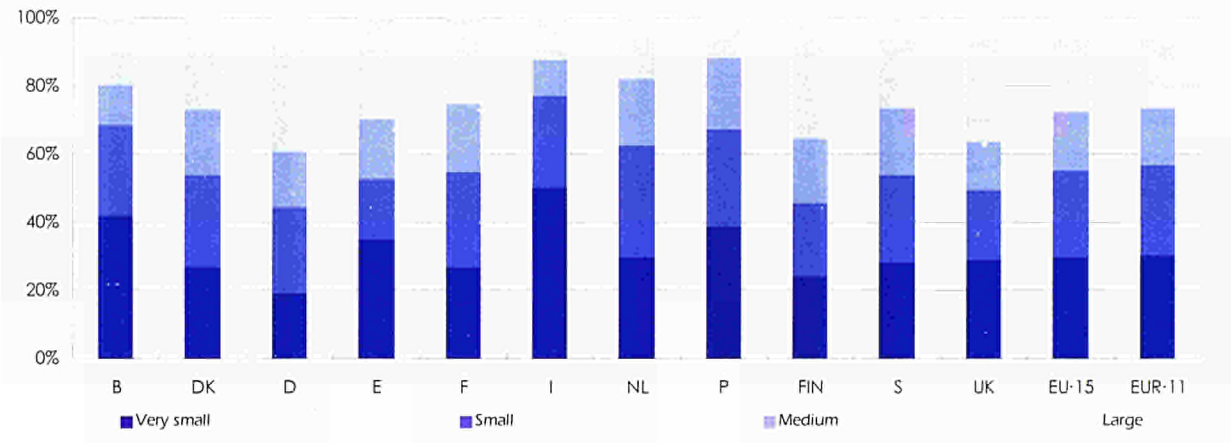
By far the highest number of persons employed was found in Germany, where over 4.3 million persons were employed in distributive trades, followed by the United Kingdom with over four million and a group of three other countries with more than two million persons employed (France, Italy and Spain). The distribution of employment amongst enterprises of different size classes has already been touched upon. One measure that reinforces the figures on the role of small enterprises in southern Europe is the ratio of the average number of persons employed per enterprise. This ratio ranged from 2.4 persons per enterprise in Italy to more than 10 persons per enterprise in Germany (for the whole of distributive trades).

There were three countries in Europe that reported turnover in excess of 750 billion ECU, they were Germany (over 1,000 billion ECU), the United Kingdom and France. Average levels of turnover per enterprise in distributive trades were low in Italy and Portugal (below 500 thousand ECU). These enterprises were often characterised by their small size and by the fact that they relied on working proprietors and family workers as staff. Germany and the United Kingdom again stood out at the other end of the spectrum, as the only two countries to have average turnover per enterprise in excess of 2 million ECU. Wholesale trade reported much higher turnover figures compared to the other two trade activities. This is due largely to the fact that within wholesale trade many goods are traded and re-traded, thus expanding the total turnover for the Division.

The third section of the analysis presented concentrates on two thematic subjects: the market structure and performance of distributive trades, as well as labour related issues within the activity. Whilst we have already cited evidence that concentration is higher in Germany and the United Kingdom than in the southern Member States of Europe, the third section of analysis outlines many of the strategies adopted by enterprises in an attempt to remain competitive. The adoption of these strategies at a faster pace in northern Europe largely explains the tendency for larger enterprises and greater levels of concentration.

Figure 1.4

Turnover in distributive trades broken down by enterprise size class, 1995 (1) (% of total)



(1) Earlier years had to be used for some countries; very small (0-9 employees); small (10-49 employees); medium (50-249 employees; large (250 or more employees).

Source: SME

Within the retail trade sector the number of new shopping formats has increased considerably over the last couple of decades. The result is manifest in the development of strategies such as out-of-town shopping centres, discount food stores, stores with staff to help package purchases, stores that deliver purchases to the home, electronic transactions and electronic stock handling devices. All of these initiatives require either economies of scale or large-scale capital investment and have hence been largely pioneered by larger enterprises. At the same time smaller enterprises have concentrated on customer service, unusual opening hours and providing a service to local and rural communities.

Data on enterprises within this report, suggest that the top twenty European enterprise groups within the retail food market accounted for half of total turnover. Indeed, the top five players in the national retail food markets of Luxembourg, Sweden and Norway reported more than 95% of domestic turnover. Concentration of turnover amongst the five largest players in France, Germany and the United Kingdom was above 60%.

Table 1.1
Top 10 in the European retail food industry in terms of turnover, 1997 ——— (million ECU)

Metro	50,765
Intermarché	30,880
Rewe	29,277
Promodès	28,205
Auchan	25,669
Tesco	24,848
Aldi	24,587
Edeka	22,942
Leclerc	21,395
Carrefour	20,842

Source: M+M Eurodata

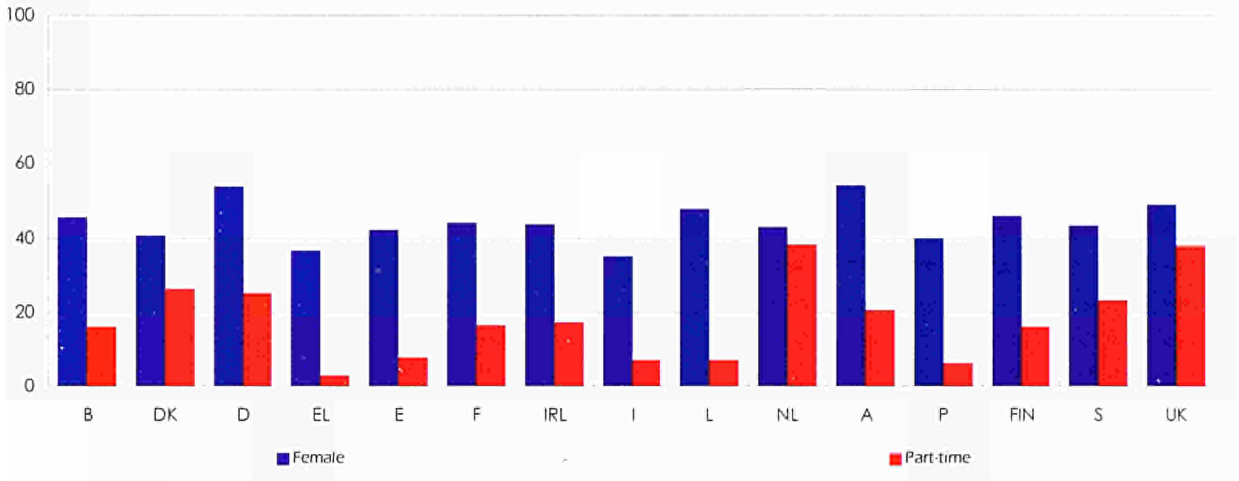
The pattern of food retailing is still largely based around national characteristics, for example, in Germany discount stores are the predominant form of retail sales format, whilst in the United Kingdom, many of the large supermarket chains have promoted their "own brands", to the detriment of recognised brand leaders. In France many food retailers have diversified into other areas of retailing from the onset of the introduction of the hypermarket sales format. This has led French hypermarkets to move to other geographical markets, in an attempt to diversify (Eastern Europe, Latin America and south-east Asia).

The risks of higher levels of concentration are evident, as a limited number of players may lead to a reduction in the number and variety of retail formats on offer for the consumer. This observation is of particular relevance for rural areas, where it is often already difficult for those without their own means of transport to reach retail outlets.

As the service provision provided by many specialist retailers has risen, it is also a component of the service provided by many wholesalers that has grown too. Additional services now being catered for by wholesale enterprises include logistics support, financial advice and transportation.

Figure 1.5

Characteristics of the distributive trades' labour force in the EU, 1997 (% of total)



Source: LFS

Table 1.2

Average gross hourly earnings in distributive trades in the EU, 1995 (ECU)

	Motor trade		Wholesale trade		Retail trade	
	Female	Male	Female	Male	Female	Male
EU-15	7.7	8.0	8.3	12.2	6.9	6.7
B	8.8	8.3	10.1	13.0	8.6	8.4
DK	13.7	11.8	13.9	13.6	12.1	8.4
D	12.5	14.2	11.0	13.6	10.7	11.3
EL	3.5	4.1	3.9	4.1	3.9	4.4
E	4.1	7.3	3.8	4.8	4.5	5.3
F (1)	7.5	8.4	8.0	18.1	6.4	7.2
I	7.3	6.3	6.6	8.2	6.2	6.9
L	10.9	12.5	12.0	12.9	8.6	10.8
NL	8.6	7.6	8.7	11.5	7.3	7.8
P	2.4	2.7	2.5	3.3	3.1	2.9
FIN	9.3	11.0	9.5	9.5	8.9	9.0
S	8.9	10.2	9.1	11.5	8.8	9.0
UK	5.2	5.6	5.4	9.1	5.0	5.7

(1) 1994.

Source: SES

Turning to trends in the labour market, we find that women took a large number of jobs in this area of the economy. At a general level, there were more than 10 million women employed in distributive trades in the EU (just under half of the total number of persons employed). By far the most important activity was that of retail trade. For example, in Austria and Germany, the number of women employed in retail trade as a share of the total number of persons employed was fast approaching the level of 70%.

Distributive trades also offer a large number of part-time jobs (again this trend is most pronounced within the activity of retail trade). There were two countries which headed the rankings for this particular indicator, the Netherlands and the United Kingdom, where around 40% of the labour force were employed on a part-time basis. The effect of changes in the composition of the labour force has resulted in the average number of hours worked falling at quite a rapid pace. For example, in France, the share of persons working a full week fell to only 31.2% of the distributive trades' labour force. Other forms of flexible working patterns that were largely evident in retail trade included a high propensity to work at weekends, in the evening or with a temporary work contract.

Earnings vary to a large degree between the three trade activities studied, with employees in wholesale trade generally the highest paid and those in retail trade generally the lowest paid. We find that women earn on average less than their male counterparts. In the EU as a whole the difference in earnings between the sexes across all distributive trades averages 25% (in terms of male earnings). In France, the Netherlands and the United Kingdom larger differences were observed (although in the latter two the high propensity for part-time work could explain the difference to some degree). Unlike many other service activities, where part-time staff often receive proportionally higher earnings than their full-time counterparts, the converse was true in retail trade.

Table 1.3

Main indicators for distributive trades in the EU, 1996 (1)

	Number of enterprises (millions)	Number of persons employed (millions)	Turnover (billion ECU)
Distributive trades (NACE Rev. 1 Section G)	4.65	22.56	4,578.1
Motor trade (NACE Rev. 1 Divison 50)	0.61	3.12	656.9
Wholesale trade (NACE Rev. 1 Divison 51)	1.24	7.08	2,535.6
Retail trade (NACE Rev. 1 Divison 52)	2.80	12.35	1,385.6

(1) Earlier years had to be used for some countries; estimates.

Source: SBS

Turning attention to the structural differences between the three trade Divisions, we find that motor trade was generally the smallest of the three trade activities using almost all measures of size, such as total turnover, the number of enterprises or the number of persons employed. Italy had by far the highest number of enterprises for this particular activity (in common with the two other trade activities). The main divergence from this pattern was for the sale of motor vehicles, where the majority of southern Member States reported high figures for average turnover per enterprise and a lower density of enterprises than the corresponding figures for northern Member States. Personnel costs usually accounted for less than 10% of total turnover across the whole of the EU motor trade (the only exception to this rule was Austria).

Wholesale trade is characterised by the highest levels of turnover amongst the three trade activities. Two countries reported average turnover per person employed above the level of 500 thousand ECU; they were Belgium and Luxembourg. It is interesting to note that the share of value added for wholesale trade in the distributive trades' total exceeded the share of employment for each country studied, often by a substantial margin (the converse was always true within the activity of retail trade). The highest wage adjusted labour productivity was hence found within the activity of wholesale trade; in Luxembourg. This measure which adjusts the traditional measure of labour productivity (value added per head) by dividing through by personnel costs per employee, is further adjusted to take account of working proprietors and family workers. These figures confirmed the results of ranking by value added per person employed, where the highest ratios were also in the wholesale trade activity.

The main characteristics of retail trade were the great diversity in enterprise structure between the northern and southern Member States. This was manifest in indicators such as the share of employees in the total number of persons employed and the average size of enterprises (low in the southern Member States) and the density of enterprises (high in the southern Member States).

In the activity of retail sale in non-specialised stores there was a comparatively high share of employees in the number of persons employed in all countries. The lowest figure was for Italy at 64%, whilst most countries had shares over 90%. However, in the retail sale of specialised stores, an activity more suited to small-sized family-run enterprises, the share of employees in the total number of persons employed was as low as 15% in Italy.

The high employment share of retail trade in the distributive trades' total may be partly explained by the high propensity to employ part-time labour within this activity. This has a negative effect on indicators such as labour productivity (calculated as value added per person employed), especially in countries such as Denmark, the Netherlands and the United Kingdom, as employment figures are not adjusted for full-time equivalents. As for wage adjusted labour productivity, the only country to report a figure below 100% was Italy (85%). In other words, value added for Italian retail trade covered only 85% of total personnel costs (when personnel costs were adjusted to take account of working proprietors and family workers). The ratio of wages and salaries to total personnel costs measures additional non-salary costs incurred by employers. In the Danish retail trade, these costs were as low as 4.9% of total personnel costs, whilst they rose to as high as 33% in Italy.

Table 1.4

Main indicators for distributive trades in the EEA, 1996 (1)

	B	DK	D (2)	F	IRL	I	L	NL (3)	A	P	FIN	S	UK	NO
Number of enterprises (thousands)	:	73.0	408.1	636.1	30.6	1,238.2	6.7	156.6	67.9	199.0	48.5	112.7	388.2	57.5
Persons employed (thousands)	569	422	4,396	2,805	212	2,938	35	1,024	521	769	211	:	:	324
Turnover (billion ECU)	195.7	97.8	995.3	759.7	40.5	545.7	11.8	226.1	119.0	95.6	67.5	138.8	791.6	84.5
Turnover/person employed (thousand ECU)	343.9	232.0	226.4	270.8	190.6	185.8	334.7	220.8	228.1	124.3	319.7	:	:	260.9
Turnover/enterprise (thousand ECU)	:	1,339	2,439	1,194	1,321	441	1,771	1,528	1,752	480	1,394	1,231	2,039	1,470
Share of production in turnover (%)	:	:	:	28.2	22.3	:	19.9	22.4	30.2	:	22.3	:	:	30.0
Share of value added in turnover (%)	10.6	:	:	13.1	14.3	14.4	12.5	:	15.8	10.8	13.6	13.5	:	12.5
Share of personnel costs in turnover (%)	6.4	:	:	:	:	5.8	6.3	7.6	10.9	7.0	8.0	9.4	6.8	8.8
Share of gross investment in turnover (%)	:	:	1.5	1.7	2.0	:	:	:	2.4	4.8	2.0	1.8	1.7	:
Personnel costs (billion ECU)	12.6	:	:	:	:	31.9	0.7	:	13.2	4.6	5.4	13.0	53.7	7.4
Personnel costs/employee (thousand ECU)	31.5	:	:	:	:	24.6	24.9	:	28.0	9.3	28.6	33.5	:	25.0
Value added at factor cost (billion ECU)	20.8	:	:	99.1	5.8	78.6	1.5	:	19.3	10.3	9.2	18.8	:	10.6
Value added/person employed (thousand ECU)	36.6	:	:	35.3	27.3	26.7	41.7	:	36.9	13.4	43.5	:	:	32.6
Wage adjusted labour productivity (%)	116.3	:	:	:	:	108.9	167.6	:	131.6	:	151.9	:	:	130.5
Gross operating surplus / person emp. (thousand ECU)	14.4	:	:	9.1	:	15.9	20.6	:	11.6	5.3	17.8	:	:	9.8
Gross investment in tangible goods (billion ECU)	:	:	14.8	12.6	0.8	:	:	:	2.9	3.1	1.4	2.5	13.5	:
Investment/person employed (thousand ECU)	:	:	3.5	4.5	3.8	:	:	:	5.6	5.2	6.5	:	:	:

(1) DK (number of enterprises, persons employed), 1995; DK and NL (turnover), 1995; A (personnel costs, value added and investment), 1995; P (personnel costs and investment), 1995; D, IRL and FIN, 1997.
(2) Excluding NACE Rev. 1 50.2, 51.1 and 52.7.
(3) Excluding NACE Rev. 1 50.1, 50.3, 51.1, 52.12 and 52.31.

Source: SBS

Structural analysis

National Accounts data allow us to look at the development of GDP over a fairly lengthy time-series. We find that the GDP of the EU and the United States have run almost in tandem over the past twenty years, with the European figure for total value added on average about 5% higher than the corresponding American figure. In Japan, GDP ran at about half the level seen in Europe. We should remember that the population of Japan and the USA is far lower than that of Europe (the population of the EU was equal to almost 374 million persons in 1997). Therefore, corresponding rates such as GDP per head give higher figures, particularly in the USA, than they do in the EU.

All three Triad economies displayed a generally positive trend in GDP over the past twenty years, with a noticeable period of rapid growth in the late eighties. Furthermore, there was a slowdown in all three economies in the early nineties, which occurred at an earlier stage in the USA than in either Europe or Japan. Since the mid-nineties there has been renewed growth in both Europe and the USA, whilst Japan has seen reduced levels of activity in the second half of the nineties.

This section of analysis will present a number of different measures taken from the Eurostat SEC2 database. The database contains National Accounts information on a variety of branches within the European economy, one of which covers "recovery and repair services, wholesale and retail trade services". It is important to note that the information provided for this branch is collected under the NACE CLIO classification system and is not fully comparable with that provided in later sections of this publication that use the NACE Rev. 1 classification system. Nevertheless, NACE CLIO data does allow us to compare the size of distributive trades with other areas of the economy, most notably other market services. For ease of reading the rather lengthy term "recovery and repair services, wholesale and retail trade services" is replaced by distributive trades or commerce.

Value added

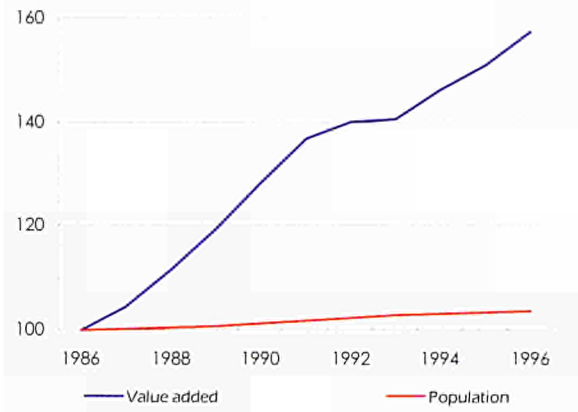
Whilst population growth has been almost stagnant in the Triad economies during the last twenty years, there has been considerable economic growth evident in many areas of the economy. The evolution of value added in distributive trades showed rapid expansion in Europe, as did the growth rate of market services' value added. Even if we factor in the change in price levels we find that there has been considerable growth in both the market services and distributive trades sectors of the economy.

If we compare the performance of the distributive trades' sector with that of the whole EU economy, we see that in 1986 distributive trades accounted for under 13% of total value added. Moving on a decade and looking at the share of distributive trades' value added in the total, it was still equal to just under 13%. Hence, there was little change in the economic weight of this sector.

The share of distributive trades' value added in the total value added of the individual European countries gives some quite different results. In Italy, commerce accounted for more than 16% of national value added. At the other extreme, we find that Iceland had only 7.8% of its wealth created within this branch of distributive trades. There were four other countries that reported shares below 10% in 1986, there were two additional Nordic countries (Finland and Sweden, as well as Ireland and Germany).

Figure 2.1

Trends in value added at factor cost of distributive trades and population in the EU (1) ——— (1986=100)

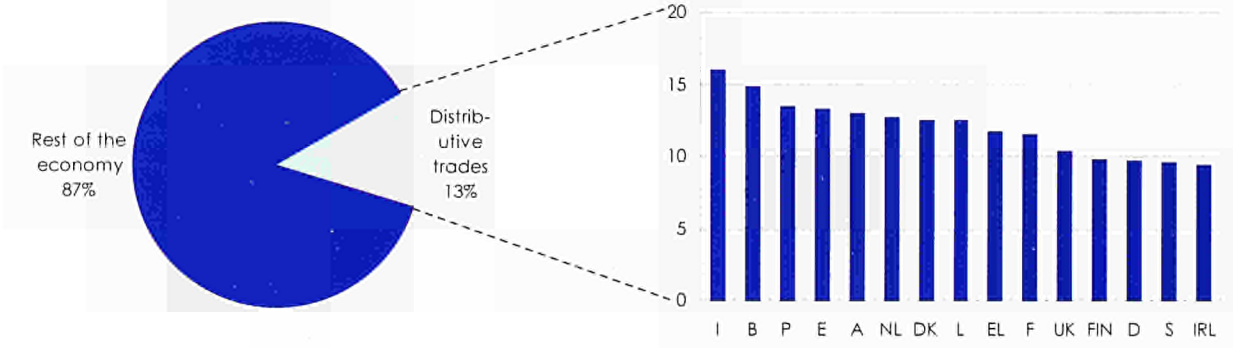


(1) Estimates for some countries.

Source: National Accounts

Figure 2.2

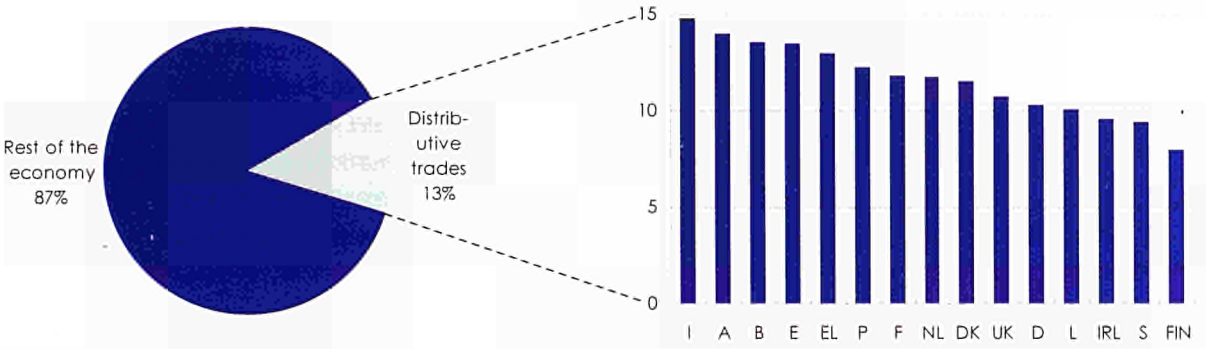
Share of distributive trades in total value added of the EU, 1986 ——— (%)



Source: National Accounts

Figure 2.3

Share of distributive trades in total value added of the EU, 1996 (1) (%)



(1) Earlier years had to be used for some countries.

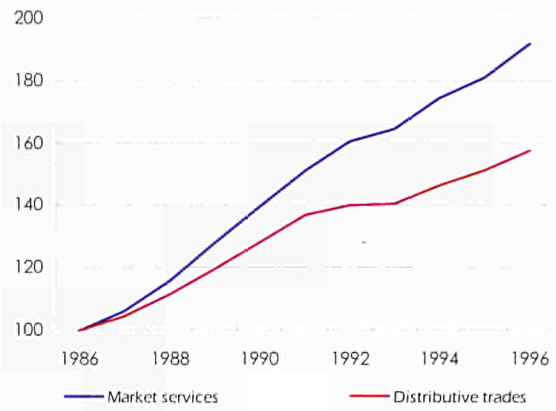
Source: National Accounts

The evolution of these shares between 1986 and 1996 showed little change. At the top end of the scale, Italy remained the European country with the highest share, followed by Austria, Belgium and Spain.

By means of international comparison we can study the evolution of distributive trades in the USA. Data from the US Bureau of Census reported that wholesale and retail trade accounted for some 15.5% of wealth created in the USA economy in 1996. If we compare the evolution of this ratio to figures from 1990, we find that the share of distributive trades in the USA economy increased during the six-year period by 0.3 percentage points. In nominal dollar terms the growth of distributive trades was 314 billion dollars (or some 247 billion ECU at 1996 exchange rates).

Figure 2.4

Trends in value added at factor cost in the EU (1) ——— (1986=100)



(1) Estimates for some countries.

Source: National Accounts

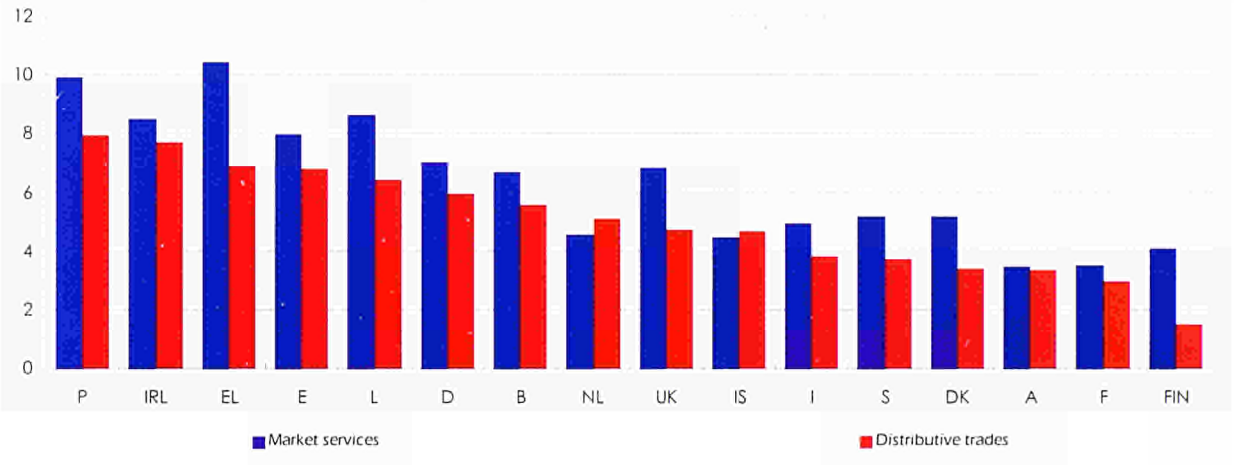
If we turn our attention to the comparative performance of distributive trades in relation to the whole of market services (including distributive trades), we find that value added at factor cost in the EU rose slightly faster in market services than in distributive trades between the mid-eighties and 1990. Particularly rapid growth was recorded between 1989 and 1990, distributive trades' value added rising by almost 15 billion ECU during the year. Since 1990 the data shows that market services have been growing at a much faster rate than distributive trades, whilst a positive trend was evident in both branches.

In the USA the same pattern was seen, with market services growing at a faster pace than distributive trades. Between 1990 and 1996, the remaining market services saw their share of American wealth grow by 1.8 percentage points.

We may therefore conclude that whilst value added of the distributive trades continues to follow a positive trend, other market services have since the turn of the 1990's grown at a faster pace. The share of distributive trades in total value added has remained almost unchanged over the past decade.

Figure 2.5

Annual average growth rates of value added in distributive trades and market services, 1986-1996 (1) ——— (%)



(1) Earlier years had to be used for some countries.

Source: National Accounts

The data available at the level of the individual European countries supports the trends observed for the EU aggregate (with quicker growth for market services during the nineties). Indeed, during the period 1986-1996, annual average growth rates were higher in market services than they were in distributive trades in all but two European countries (subject to data availability). In the Netherlands, distributive trades value added outperformed market services by 0.5 percentage points per annum, growing on average 5.1% per annum over the period considered. In Iceland the difference was even less, with value added in distributive trades growing by just 0.2 percentage points more than the market services' aggregate. There were three countries that reported growth of value added of market services 2 percentage points higher than growth rates observed in distributive trades; Greece, Luxembourg and Finland. Indeed, Finland was the country where the lowest rate of growth for value added in distributive trades was reported, some 1.5% per annum.

In both distributive trades and market services annual average growth rates of value added remained positive in all countries. Figure 2.5 shows these growth rates, ranked according to performance within the distributive trades' branch. We find that the highest rates of growth were recorded in Portugal and Ireland, where annual averages attained 8.0% and 7.7% respectively. There were two other countries that reported growth above the level of 6.5% per annum, they were Greece (6.9%) and Spain (6.8%).

Persons employed

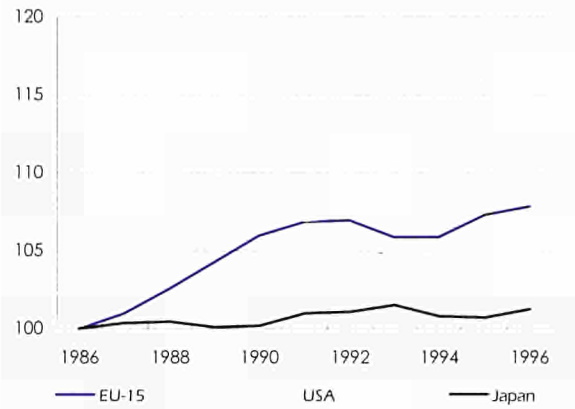
Distributive trades is one of the most important sectors of the European economy in terms of its contribution to supplying work to a large proportion of the European labour force. The second thematic section of this publication will look in more detail at the breakdown of the labour force (role of women, part-time labour and earnings). This section will concentrate on a more general summary of employment trends in the EU, as well as Japan and the USA.

Distributive trades provided work to more than 15% of the EU workforce in 1996, with a gradual increase in the share of this branch during the last twenty years. If we take the period 1986 to 1996 we see that the EU workforce expanded by 7%, whilst the corresponding growth rate in the USA was 18%. In Japan there was a modest change in the number of persons occupied (growth of 1.2%). As can be seen from figure 2.6 there was a much smoother trend to the evolution of employment in the EU than that of the USA, where rapid expansion between 1986 and 1989, was followed by a reduction in the workforce during 1990 and 1991. However, with the recovery of the American economy there has once again been a rapid expansion in the American workforce, with annual gains in the number of persons occupied above 3% in both 1994 and 1995. Indeed, the American economy displays a tendency to react very rapidly to economic performance, with changes in the distributive trades' workforce showing strong cyclical patterns.

If we look at levels, we see that there were over 22 million persons occupied within distributive trades in the EU. Comparative figures for the USA showed there were 23.6 million persons in 1997. Japan had a much lower number, with 11.4 million persons occupied in 1996.

Figure 2.6

Trends in employment in distributive trades ——— (1986=100)



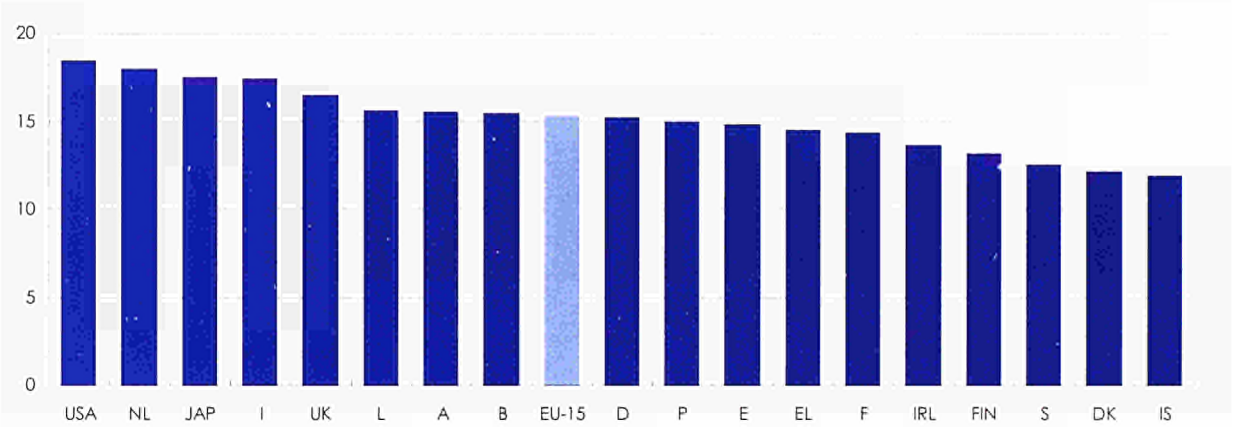
Source: National Accounts

Figure 2.7 shows the share of occupied persons in distributive trades as a percentage of the total. It is interesting to note that both the USA (18.5%) and Japan (17.6%) figure in the top three countries. They are separated in the ranking by the Netherlands (18.0%), a country with a high propensity for part-time workers (as is the USA). It should be noted that the data in this section refer to simple head-counts and not to full-time equivalents (in other words the data do not reflect the number of hours that are being worked by each person). Another European country with a high propensity for part-time employment, the United Kingdom, was also found near the top of the ranking, with 16.5% of the total number of persons occupied active within distributive trades. Italy reported a high share with some 17.5% of the total active in commerce, which was in line with the important share of value added for this country.

If we turn our attention to the development of employment within distributive trades over a ten-year period between 1986 and 1995, we find that there was growth in the majority of countries. Nevertheless, the four Nordic economies of Denmark, Finland, Iceland and Sweden all reported a decline in employment over the period, as did Ireland and Italy. The largest reductions were recorded in Finland, where employment fell by 2.3% per annum. Other than Iceland (-1.2% per annum), no other country reported annual average reductions of more than 1%.

Figure 2.7

Share of persons employed in distributive trades, 1997 (1) ——— (%)



(1) Earlier years had to be used for some countries.

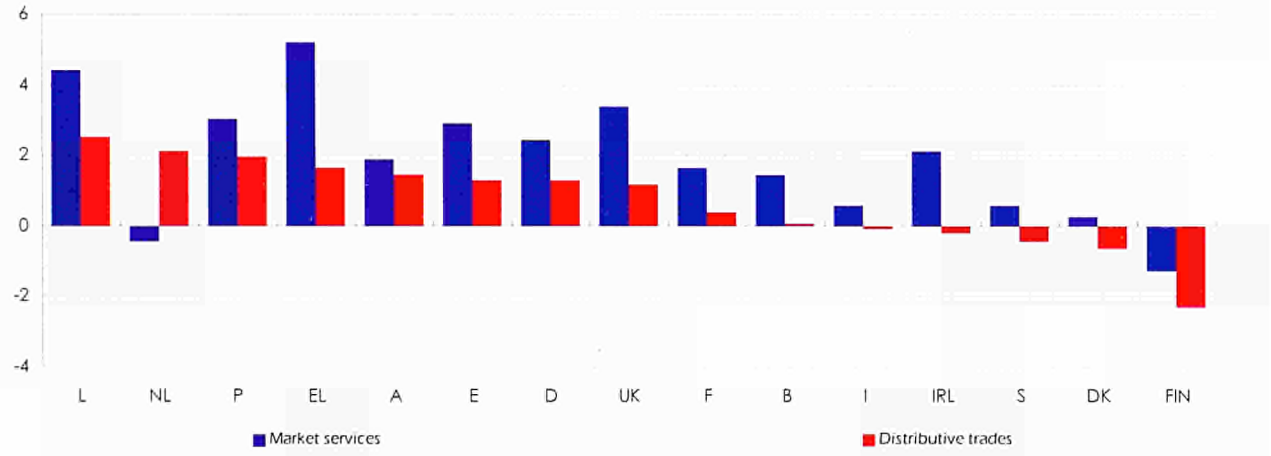
Source: National Accounts

Three countries were able to report growth in excess of 2% per annum; Luxembourg, the Netherlands and Portugal.

Growth in the USA was equal to 1.7% on average over the period, although more recent data from national sources suggests that the American sector has shown rapid expansion during the second half of the nineties. In Japan growth was far more subdued, with annual average changes of just 0.1% per annum between 1986 and 1995.

Figure 2.8

Annual average growth rates of employment in distributive trades and market services, 1986-1995 (1) (%)



(1) Earlier years had to be used for some countries.

Source: National Accounts

We may compare the performance of employment creation within distributive trades with that of market services as a whole. It is evident that the growth in employment in distributive trades is not as pronounced as for market services (whilst still usually above the average performance of the whole economy). Annual average growth rates between 1986 and 1995 showed that the growth of market services' employment out-performed that of distributive trades in all but one country, the Netherlands, where distributive trades reported growth some 2.6 percentage points above that found in market services. Indeed, market services in the Netherlands recorded a decline in employment levels over the period (Finland was the only other country to do so). The differential between market services' growth and distributive trades' growth was sometimes greater than 2 percentage points. This was the case in the United Kingdom, where market services' employment grew by 3.4% per annum, whilst distributive trades' employment growth was equal to only 1.2% per annum.

We may therefore conclude that changes in employment followed closely the pattern observed for value added. In other words, whilst positive trends were generally reported, the rates of growth in distributive trades did not match those in the remainder of market services. Of the five countries that reported the highest growth rates for value added, four also recorded high employment growth: Greece, Luxembourg, Spain and Portugal. Only the Netherlands reported a high growth rate for employment, with a more moderate expansion of value added. If we compare the difference between the shares of value added and employment accounted for by the branch of distributive trades in each economy we find that five countries reported more than 5 percentage points difference, they were the Netherlands, the United Kingdom, Luxembourg, Finland and Germany. Rather than interpreting this data as proof that the branch was not productive in these countries, it is perhaps more prudent to consider that they are countries where retail trade is particularly developed, with flexible working patterns involving part-time work and evening work. Hence, the head count of employment tends to over estimate the role of labour in such a comparison.

Productivity, wages and salaries and investment

To assess the performance of distributive trades we may look at several measures from labour compensation, through productivity measures to investment ratios. This section will outline the latest figures seen for a variety of indicators, which may be used to assess the competitiveness of distributive trades amongst countries. As such, the figures offer benchmarks between the countries. The data provided does not allow a comparison of the performance of distributive trades with respect to other areas of the European economy, other than the basic comparison of data against the market services' average (including distributive trades).

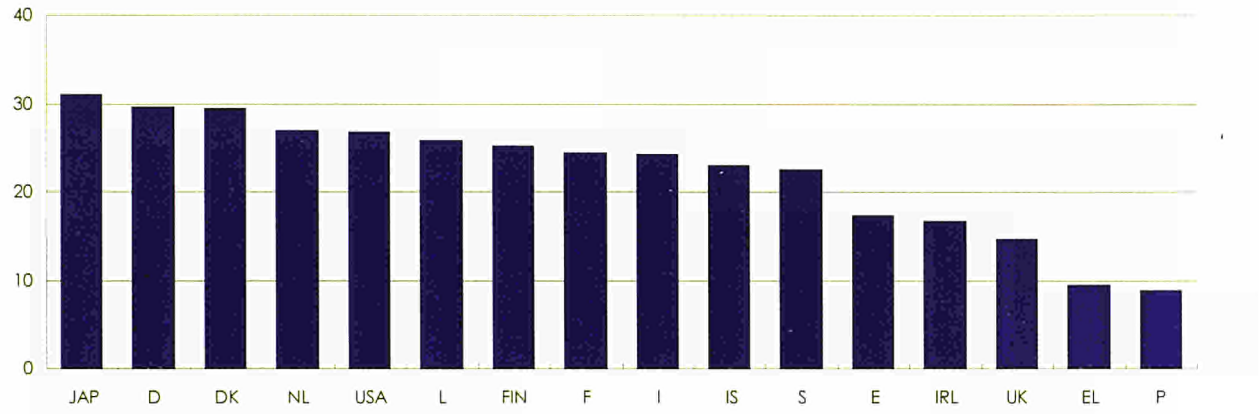
Compensation per employee in distributive trades was generally found to be below levels in the remainder of the economy. In addition, comparisons with the other two members of the Triad showed that the European compensation of its workforce was generally at lower levels than in Japan (31.2 thousand ECU per year), whilst roughly corresponding with American figures (26.9 thousand ECU per employee) in 1996.

However, it was possible to note that Germany and Denmark had compensation costs per employee almost on a par with those of Japan. They were followed by a large number of countries reporting compensation costs per head between 27.0 thousand ECU and 22.5 thousand ECU. Lower in the ranking there were three countries grouped together; Spain, Ireland and the United Kingdom (where compensation per employee was between 17.5 thousand ECU and 14.8 thousand ECU). At the bottom of the ranking Greece and Portugal both reported compensation costs below 10 thousand ECU per head.

If we turn our attention to labour productivity, we find that the same two countries, Greece and Portugal reported the lowest levels of value added per head (20.7 and 14.8 thousand ECU respectively). The majority of the other European countries saw their labour productivity in the range of 30 to 40 thousand ECU per head. At the top end of the ranking, Denmark and Belgium reported labour productivity of 44.4 and 55.9 thousand ECU per head. This measure of labour productivity does not take account of the different hours worked by each occupied person.

Figure 2.9

Compensation per employee in distributive trades, 1997 (1) ——— (thousand ECU)

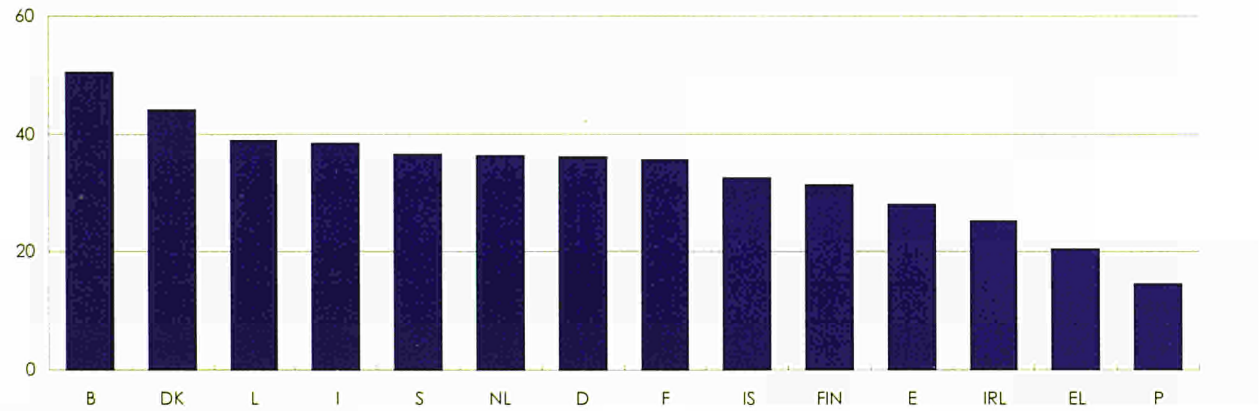


(1) Earlier years had to be used for some countries.

Source: National Accounts

Figure 2.10

Value added per person employed in distributive trades, 1997 (1) ——— (thousand ECU per head)

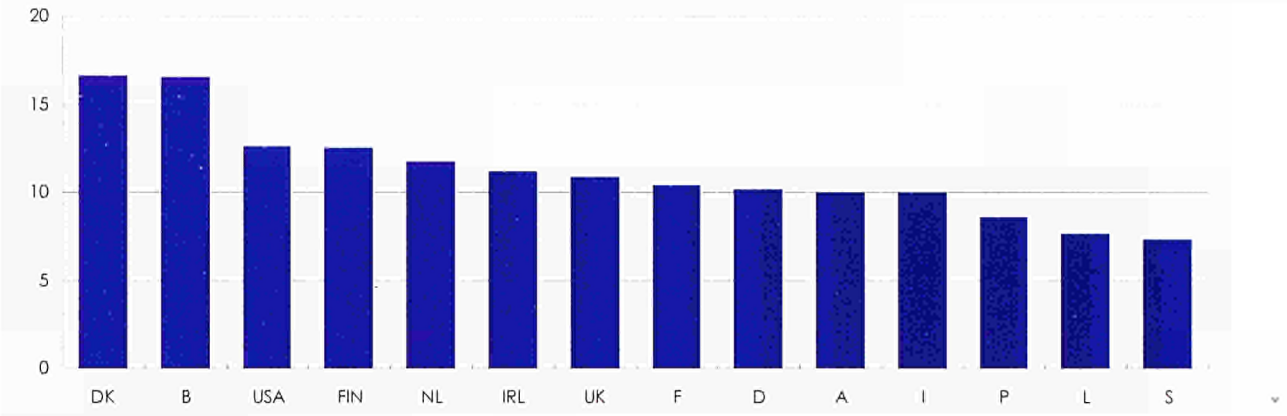


(1) Earlier years had to be used for some countries.

Source: National Accounts

Figure 2.11

Gross fixed capital formation in distributive trades as a share of market services, 1997 (1) (%)



(1) Earlier years had to be used for some countries.

Source: National Accounts

Finally, we will look at investment, which has traditionally been lower in distributive trades than in other market services. One way to measure the trends in investment is to look at the ratio of gross fixed capital formation for distributive trades in the market services total. Distributive trades accounted for over 12% of investment in market services in the USA. Despite the fact that the American figures showed a more volatile profile, the general trend was that the USA reported higher rates of investment in the branch of distributive trades (when compared to the remainder of market services).

There were however a couple of European countries that bucked this trend, Belgium and Denmark. Both these countries had very high shares of investment in distributive trades (accounting for more than 16% of the market services' total). These two countries were the two that also reported the highest levels of labour productivity. This would suggest that the substitution of labour for capital had a positive effect in terms of productivity.

Business statistics

The data that follows in this section of analysis is based on the Council Regulation No. 58/97 concerning structural business statistics. This Regulation (see notes and sources) was adopted on 20th December 1996 and has led to a rapid improvement of data for the majority of Member States in the area of trade statistics. However, the data presented is still partially incomplete due to derogations requested by the Member States. As such, at the time of writing, it is still impossible to create European aggregates using this data source (possible when using estimates). Eurostat have been able to produce a limited number of estimates for the NACE Rev. 1 Divisions for three key variables.

The SBS Regulation requires that the Member States send their data to Eurostat according to the NACE Rev. 1 classification system. It should be noted that there may be differences between the data provided in the section on small and medium-sized enterprises (SMEs) and that found within this section, which uses annual surveys as its source of information. The data presented within this section are based upon a legal framework and as such should be more reliable than those collected on an ad-hoc basis for the study of SMEs. The data in this section are given in the form of four aggregates:

- Section G, which refers to "wholesale and retail trade; repair of motor vehicles, motorcycles and personal and household goods";
- Division 50, which refers to the motor trade;
- Division 51, which refers to wholesale trade;
- Division 52, which refers to retail trade.

For more detailed data, please refer to the relevant section within the sectoral analysis that follows later in this publication.

The American data that is presented for the purpose of comparisons was provided by the US Bureau of Census using the NAICS classification system. Japanese data come from the Ministry of International Trade and Industry (MITI) and refer to headings under the Standard Industrial Classification for Japan (JSIC). These data have been converted to ECU terms using daily average market exchange rates that have been aggregated to annual figures. It should be noted that no conversion from the national classifications to NACE Rev. 1 have been attempted as the conversion keys that exist were not considered reliable enough. As such the figures should be viewed with caution, as the headings are not fully comparable across the three Triad regions.

Table 2.1

Main indicators for distributive trades in the EU, 1996 (1)

	Number of enterprises (millions)	Number of persons employed (millions)	Turnover (billion ECU)
Distributive trades (NACE Rev. 1 Section G)	4.65	22.56	4,578.1
Motor trade (NACE Rev. 1 Divison 50)	0.61	3.12	656.9
Wholesale trade (NACE Rev. 1 Divison 51)	1.24	7.08	2,535.6
Retail trade (NACE Rev. 1 Divison 52)	2.80	12.35	1,385.6

(1) Earlier years had to be used for some countries; estimates.

Source: SBS

Table 2.2

Enterprise and employment characteristics in the EEA, 1996 (1)

	B	DK	D (2)	F	IRL	I	L	NL (3)	A	P	FIN	S	UK	IS	NO
Distributive trades: NACE Rev. 1 Section G															
Enterprises (thousands)	:	73.0	408.1	636.1	30.6	1,238.2	6.7	156.6	67.9	199.0	48.5	112.7	388.2	:	57.5
Enterprise density (per 10,000 inhabitants)	:	139.7	52.4	109.0	80.4	215.7	160.1	100.8	84.2	200.5	93.2	127.5	66.0	:	131.3
Persons employed (thousands)	569	422	4,396	2,805	212	2,938	35	1,024	521	769	211	:	:	:	324
Ratio of employees to persons employed (%)	70.4	79.6	:	90.9	84.4	44.2	85.0	84.3	90.3	82.2	89.6	:	:	:	91.4
Persons employed per enterprise (units)	:	5.8	10.8	4.4	6.9	2.4	5.3	6.9	7.7	3.9	4.4	:	:	:	5.6
Motor trade: NACE Rev. 1 Division 50															
Enterprises (thousands)	:	12.7	39.0	82.5	5.1	164.4	0.8	20.8	8.1	28.2	8.8	17.6	71.1	:	8.1
Enterprise density (per 10,000 inhabitants)	:	24.3	5.1	14.1	13.0	28.6	20.4	13.4	10.0	28.4	16.3	20.0	12.1	:	18.5
Persons employed (thousands)	77	63	452	418	30	435	6	128	75	138	31	:	:	:	50
Ratio of employees to persons employed (%)	69.8	64.5	:	91.5	82.5	47.6	87.6	80.8	92.0	86.9	86.0	:	:	:	92.1
Persons employed per enterprise (units)	:	5.0	11.6	5.1	5.9	2.6	6.9	6.0	9.3	4.9	3.6	:	:	:	6.2
Wholesale trade: NACE Rev. 1 Division 51															
Enterprises (thousands)	:	28.3	75.0	161.1	4.9	365.1	2.6	49.8	20.9	52.7	16.1	39.7	110.1	1.5	17.6
Enterprise density (per 10,000 inhabitants)	:	54.1	9.9	27.6	12.1	63.6	63.6	32.1	25.9	53.1	30.2	44.9	18.7	:	40.2
Persons employed (thousands)	216	169	1,250	943	50	992	12	410	191	260	80	:	:	7	107
Ratio of employees to persons employed (%)	78.2	77.7	:	98.0	92.3	54.2	86.5	92.2	94.3	88.1	93.3	:	:	95.2	94.8
Persons employed per enterprise (units)	:	6.0	16.7	5.8	10.2	2.7	4.6	7.8	9.1	4.9	4.9	:	:	4.8	6.1
Retail trade: NACE Rev. 1 Division 52															
Enterprises (thousands)	:	31.7	294.1	392.4	20.7	708.7	3.2	86.0	38.9	118.2	23.6	55.4	207.0	1.7	31.8
Enterprise density (per 10,000 inhabitants)	:	60.3	37.5	67.2	55.4	123.5	76.1	55.4	48.3	119.0	46.7	62.7	35.2	:	72.6
Persons employed (thousands)	276	194	2,693	1,445	132	1,511	17	585	256	371	100	:	:	8	166
Ratio of employees to persons employed (%)	64.5	86.8	:	86.0	81.8	36.7	83.0	79.2	86.8	76.3	87.9	:	:	:	89.0
Persons employed per enterprise (units)	:	6.1	9.2	3.7	6.4	2.1	5.5	6.5	6.6	3.1	4.3	:	:	4.6	5.2

(1) DK, 1995; D, IRL, FIN, 1997.
(2) Excluding NACE Rev. 1 50.2, 51.1 and 52.7.
(3) Excluding NACE Rev. 1 50.1, 50.3, 51.1, 52.12 and 52.31, except for number of enterprises and enterprise density.

Source: SBS

The enterprise population that makes up distributive trades in the European Union is estimated at 4.65 million enterprises. Data is also available for Norway where there were almost 60 thousand enterprises operating in the activity of trade and for Iceland, where the figure was equal to almost 4 thousand enterprises.

The number of enterprises within the activity of distributive trades rose to as high as 1.2 million enterprises in Italy in 1996. This figure was well ahead of any other country and confirmed the important role of small enterprises within the Italian economy in general and more specifically within distributive trades. More than half of these enterprises operated within retail trade, some 57.2% of the distributive trades' total, or almost 710 thousand units. Another measure which provides useful information on the proximity of distributive trades' enterprises to their customers is that of enterprise density, where we find that there were 215 distributive trades' enterprises for each 10,000 inhabitants in Italy (by far the highest ratio in the EU). The lowest levels of enterprise density for distributive trades were found in Germany and the United Kingdom, where there were less than 70 enterprises for each 10,000 inhabitants (it should be noted that three NACE Rev. 1 Groups are missing from the German data).

By means of comparison we may note that the most recent data from the US Bureau of Census reported that there were more than 450 thousand establishments in the American wholesale trade industry, some 250 thousand in the activity of motor trade and around 870 thousand establishments in retail trade. The two largest sub-activities in the USA were food and beverages and clothing stores, each accounting for around 150 thousand establishments. It should be noted that these figures refer to establishments, which are defined as "...single physical locations at which business is conducted. An establishment is not necessarily identical with a company or enterprise, which may consist of one establishment or more". In Japan there was a predominance of small-sized establishments. Wholesale trade accounted for almost 430 thousand establishments, whilst retail trade numbered almost 1.5 million.

Table 2.3
Distributive trades in the USA, 1997 (1)

	Distributive trades	Motor trade	Wholesale trade	Retail trade
Number of establishments (units)	1,573,433	249,029	453,184	871,220
Number of employees (thousands)	19,936	2,661	5,820	11,455
Turnover (million ECU)	5,741,947	745,376	3,575,732	1,420,839
Turnover per establishment (million ECU)	3.6	3.0	7.9	1.6
Personnel costs (million ECU)	400,809	54,728	190,241	155,840
Average personnel costs per head (thousand ECU)	20.1	20.6	32.7	13.6

(1) Motor trade, NAICS code 441+447; wholesale trade, NAICS code 42; retail trade, NAICS code 44+45-(441+447).

Source: US Bureau of Census

Table 2.4

Enterprise and employment characteristics in the CECs, 1997

	Albania	Bulgaria	Czech Republic	Estonia	Hungary (1)	Latvia	Lithuania	Poland	Romania (2)	Slovak Republic	Slovenia
Distributive trades: NACE Rev. 1 Section G											
Enterprises (thousands)	14.0	97.3	520.2	11.6	39.6	15.4	17.5	1,006.7	226.1	81.4	23.0
Enterprise density (per 10,000 inhabitants)	42.8	116.3	505.1	78.7	38.9	62.8	47.3	260.4	100.3	151.1	116.1
Persons employed (thousands)	24.5	289.5	751.4	:	:	105.4	246.5	2,061.0	:	:	108.0
Ratio of employees to persons employed (%)	15.2	61.4	69.4	:	:	94.6	65.6	66.1	:	:	85.1
Persons employed per enterprise (units)	1.7	3.0	1.4	:	:	6.8	14.1	2.0	:	:	4.7
Motor trade: NACE Rev. 1 Division 50											
Enterprises (units)	752	5,034	28,519	1,142	4,775	1,236	1,211	104,172	12,017	4,602	1,582
Enterprise density (per 10,000 inhabitants)	2.3	6.0	27.7	7.8	4.7	5.0	3.3	26.9	5.3	8.5	8.0
Persons employed (thousands)	2.4	24.9	74.4	:	:	10.8	18.4	204.0	:	:	19.0
Ratio of employees to persons employed (%)	67.0	76.1	75.1	:	:	97.1	65.8	65.2	:	:	72.6
Persons employed per enterprise (units)	3.2	4.9	2.6	:	:	8.7	15.2	2.0	:	:	12.0
Wholesale trade: NACE Rev. 1 Division 51											
Enterprises (units)	2,136	22,020	170,318	6,895	22,560	3,730	2,475	244,181	51,572	34,987	15,531
Enterprise density (per 10,000 inhabitants)	6.5	26.3	165.4	46.9	22.1	15.2	6.7	63.2	22.9	64.9	78.2
Persons employed (thousands)	7.3	96.9	240.5	33.4	:	28.2	38.2	719.0	:	:	23.0
Ratio of employees to persons employed (%)	6.3	73.7	75.8	:	:	97.0	65.7	81.2	:	:	:
Persons employed per enterprise (units)	3.4	4.4	1.4	5.0	:	7.6	15.4	2.9	:	:	1.5
Retail trade: NACE Rev. 1 Division 52											
Enterprises (units)	11,158	70,215	321,366	3,526	12,289	10,468	13,813	658,343	162,524	41,835	5,930
Enterprise density (per 10,000 inhabitants)	34.0	84.0	312.0	24.0	12.1	42.6	37.3	170.3	72.1	77.6	29.9
Persons employed (thousands)	14.8	167.7	436.5	:	:	66.5	189.9	1,138.0	:	:	66.0
Ratio of employees to persons employed (%)	11.1	52.1	64.9	:	:	93.2	65.6	56.8	:	:	74.0
Persons employed per enterprise (units)	1.3	2.4	1.4	:	:	6.4	13.7	1.7	:	:	11.1

(1) Revised; for businesses with double-entry book-keeping only.
(2) 1996 for total and retail trade.

Source: National Statistical Offices

If we turn our attention to the Central European Countries (CECs) we find that there were over 2 million enterprises active in the eleven CECs covered in table 2.4. The number of enterprises has grown at a rapid pace within these countries since the transition to market based economies. Poland reported by far the highest number of enterprises, around 1 million in 1997. The average number of enterprises per 10,000 inhabitants was generally far higher in the CECs than it was in the EU countries. For example, in the Czech Republic there were over 300 retail trade enterprises for each 10,000 inhabitants, well above the 124 enterprises found in Italy (the highest figure for any EU country).

Employment indicators

The highest number of persons employed in distributive trades was found in Germany in 1997, where there were over 4.3 million persons employed (not including three NACE Rev. 1 Groups). The United Kingdom followed in the ranking with just over 4 million persons employed (estimated). Three other countries had more than 2 million persons employed, they were France, Italy and Spain (estimated).

Data for the USA allows us to make an international comparison. The US Bureau of Census reported that in 1997 there were more almost 20 million employees in the activity of distributive trades. They were broken down as 2.7 million in the motor trade, 5.8 million in wholesale trade and almost 11.5 million in retail trade. It should be noted that these figures do not include those members of the workforce who were working proprietors or family workers. Indeed, National Accounts data suggest there were some 23.6 million persons employed in the USA.

Employment in CECs was generally concentrated within the activity of retail trade, where an absolute majority of the total number of persons employed within distributive trades was found for each country that provided data. Employment was concentrated within small-sized enterprises. In comparative terms, the total number of persons employed was far higher in the CECs than in the remainder of Europe. For example, in Poland, the number of persons employed was almost as high as in the United Kingdom, at more than 2 million in 1997.

Rather than look at the total number of persons employed which is largely a reflection of the size of each country, it is also interesting to study the average number of persons employed per enterprise. This ratio gives further confirmation on the structure of enterprises within each country. By far the lowest ratio was recorded in Italy, where there were 2.4 persons employed per enterprise throughout the whole of distributive trades. Portugal was the only other country to report an average number of persons employed below 4 persons. Looking at the breakdown of these figures by NACE Rev. 1 Division, we find that lower averages were reported in retail trade and higher values were found in the activity of wholesale trade.

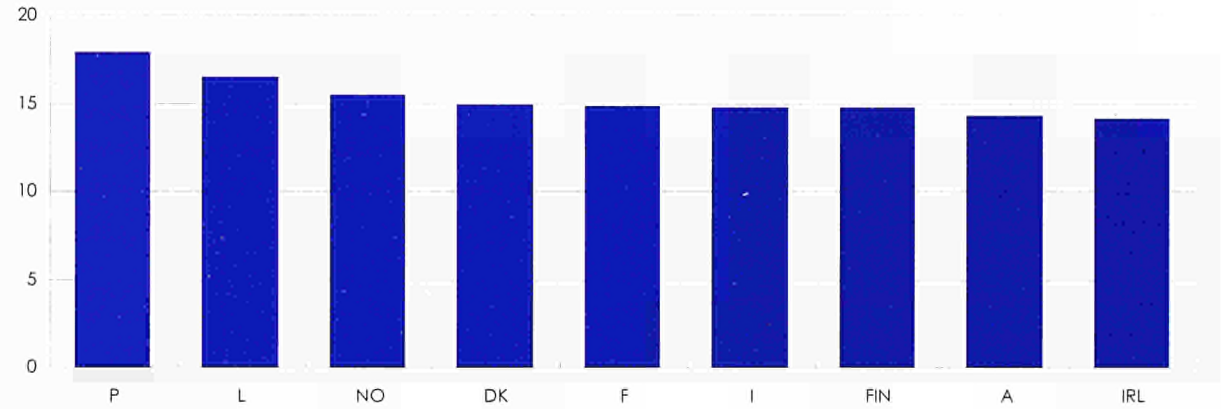
There were only three data points recording an average number of persons employed above 10 persons. Two of these were in Germany in the motor trade and wholesale trade (where 11.6 and 16.7 persons were employed per enterprise). In Ireland the wholesale trade industry also reported a high figure, with 10.2 persons employed on average per enterprise. The United Kingdom reported that in retail trade there were on average 12 persons employed per enterprise (estimate). This figure was of particular interest as it was higher than the corresponding averages for either motor trade or wholesale trade. Indeed, Denmark was the only other country to report that retail trade had the highest average number of persons employed per enterprise.

An alternative ratio for studying the structure of distributive trades in Europe is the ratio of employees to the total number of persons employed. This ratio allows us to measure the number of persons who are either working proprietors or family workers, in other words, persons employed without a contract or a fixed wage or salary. The ratio provides evidence that in the southern Member States there is a far more reliance on these members of the work-force. Indeed, if we look at the data for the whole of distributive trades we see that the lowest ratio of employees to persons employed was found in Italy, where employees accounted for just 44.2% of the workforce. At the other end of the spectrum, we find that more than 90% of the distributive trades' workforce were employees in three of the European countries for which data was available; Austria, France and Norway.

If we look in more detail at the ratio of employees to persons employed we find that the share of employees was generally higher in wholesale trade and motor trade. Two countries did not follow this trend and reported that there were more employees in retail trade than in other distributive trades' activities. Whilst 86.8% of the Danish workforce in retail trade were employees, the corresponding ratios for motor trade and wholesale trade were 64.5% and 77.7%. In Finland, the ratio of employees to persons employed was slightly lower in the motor trade than in retail trade.

Figure 2.12

Share of distributive trades' employment within the motor trade, 1996 (1) (%)



(1) Latest year available.

Source: SBS

Figures 2.12 to 2.14 show the shares of employment found within each of the distributive trades by country. It is important to note that the activity of wholesale trade shows the widest variations in employment between the countries, followed by motor trade and retail trade.

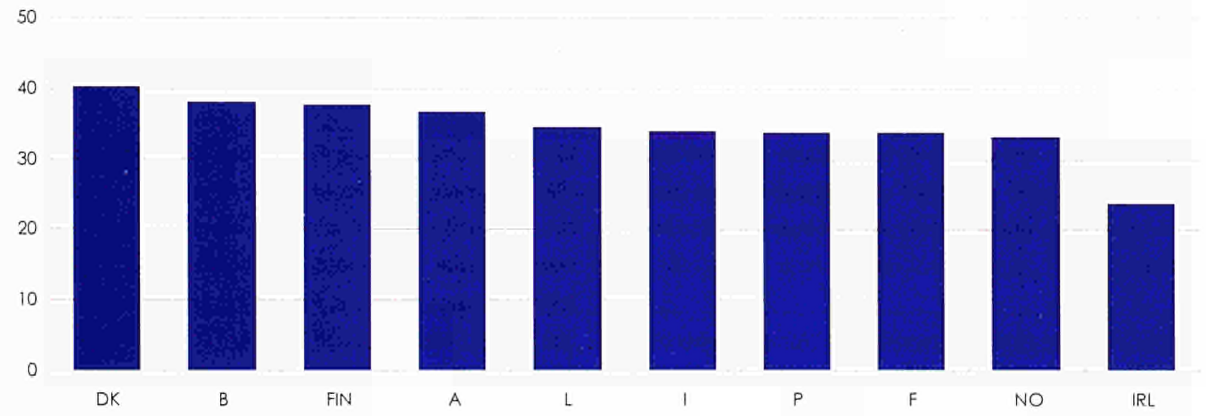
In the motor trade we find that the United Kingdom (estimate), Luxembourg and Portugal have the highest share of persons employed relative to the other countries.

In wholesale trade we find that the highest employment shares were recorded in Denmark, Belgium and Finland, followed by Austria. All four of these countries reported at least 35% of employment in the activity of wholesale trade. At the other extreme, Ireland and the United Kingdom (estimate) reported the lowest shares.

In retail trade, Ireland and the Netherlands (estimate) returned high shares. The Nordic countries were found at the bottom of the ranking, with Denmark reporting employment in retail trade equal to 45% of the distributive trades' total.

Figure 2.13

Share of distributive trades' employment within wholesale trade, 1996 (1) ——— (%)

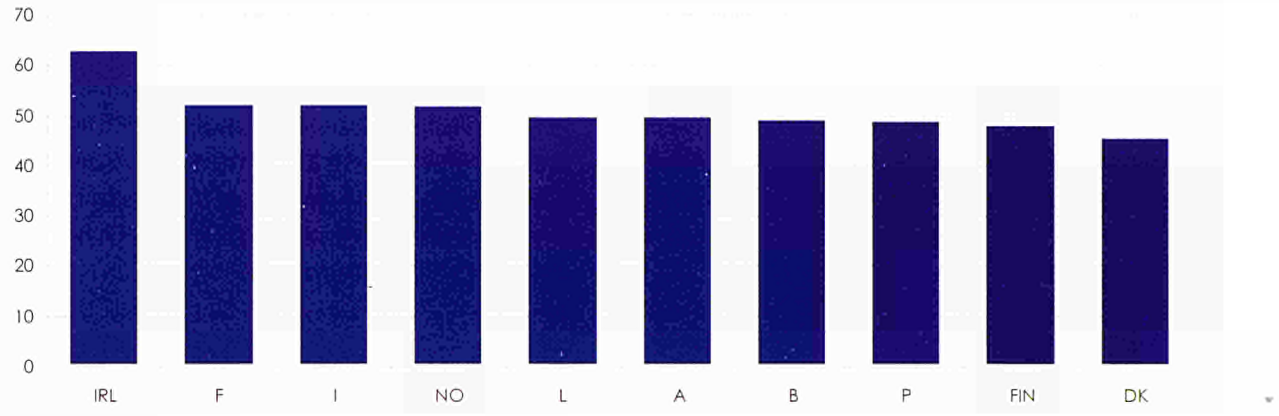


(1) Latest year available.

Source: SBS

Figure 2.14

Share of distributive trades' employment within retail trade, 1996 (1) (%)



(1) Latest year available.

Source: SBS

Turnover

Turnover reached an estimated 4,600 billion ECU in 1996, with the figure for the euro-zone[1] over 3,500 billion ECU. Data was also available for Norway, where turnover was equivalent to some 85 billion ECU.

Whilst Italy and Spain (estimate) reported the highest number of enterprises in distributive trades in the EU, Germany, the United Kingdom and France all had far higher levels of turnover.

Turnover in Germany rose to over one thousand billion ECU in 1997 (accounting for the fact that three of the NACE Rev. 1 Groups within distributive trades were not available). The German figures were well above those recorded in either the United Kingdom or France, the second and third ranking countries with 792 billion ECU and 760 billion ECU of turnover respectively for the whole of distributive trades.

Turnover in the USA was equal to almost 5,700 billion ECU in 1997 for distributive trades, broken down into the following components: motor trade (745 billion ECU), wholesale trade (3,576 billion ECU) and retail trade (1,421 billion ECU). The data for Japan reported a slightly lower figure of 5,420 billion ECU for the whole of distributive trades, a very high figure considering the smaller size of the Japanese market. The breakdown of Japanese turnover was as follows: 4,239 billion ECU in wholesale trade and 1,181 billion ECU in retail trade.

(1) Belgium, Germany, Spain, France, Ireland, Italy, Luxembourg, the Netherlands, Austria, Portugal and Finland make up the EUR-11 aggregate, otherwise known as the euro-zone.

Table 2.5

Turnover characteristics in the EEA, 1996 (1)

	B	DK	D (2)	F	IRL	I	L	NL (3)	A	P	FIN	S	UK	IS	NO
Distributive trades: NACE Rev. 1 Section G															
Turnover (billion ECU)	195.7	97.8	995.3	759.7	40.5	545.7	11.8	226.1	119.0	95.6	67.5	138.8	791.6	:	84.5
Turnover/person employed (thousand ECU)	343.9	232.0	226.4	270.8	190.6	185.8	334.7	220.8	228.1	124.3	319.7	:	:	:	260.9
Turnover/enterprise (thousand ECU)	:	1,339	2,439	1,194	1,321	441	1,771	1,528	1,752	480	1,394	1,231	2,039	:	1,470
Motor trade: NACE Rev. 1 Division 50															
Turnover (billion ECU)	33.5	11.4	121.3	99.0	8.4	95.1	2.2	6.9	17.7	20.2	10.5	22.1	131.6	:	16.2
Turnover/person employed (thousand ECU)	434.1	180.6	268.2	236.9	278.5	218.7	375.0	237.2	236.9	146.7	336.0	:	:	:	321.5
Turnover/enterprise (thousand ECU)	:	894	3,111	1,200	1,656	578	2,577	1,244	2,198	719	1,192	1,255	1,851	:	1,996
Wholesale trade: NACE Rev. 1 Division 51															
Turnover (billion ECU)	118.7	62.0	556.6	409.6	18.7	286.4	7.0	184.4	68.4	47.9	38.5	79.9	422.5	1.6	46.5
Turnover/person employed (thousand ECU)	548.2	366.9	445.3	434.5	373.5	288.6	579.4	401.6	358.3	184.4	483.8	:	:	229.4	433.0
Turnover/enterprise (thousand ECU)	:	2,191	7,425	2,542	3,812	784	2,656	3,785	3,273	908	2,392	2,015	3,837	1,096	2,641
Retail trade: NACE Rev. 1 Division 52															
Turnover (billion ECU)	43.6	24.6	317.3	251.2	13.3	164.3	2.6	54.6	32.8	27.5	18.5	36.7	237.4	:	21.9
Turnover/person employed (thousand ECU)	158.3	126.9	117.8	173.9	101.1	108.7	149.3	93.3	128.4	74.0	184.5	:	:	:	131.5
Turnover/enterprise (thousand ECU)	:	776	1,079	640	646	232	815	606	843	233	785	662	1,147	:	688

(1) Earlier years had to be used for some countries: B, DK (except NACE Rev. 1 52), IS and NL, 1995; D, IRL and FIN, 1997.
(2) Excluding NACE Rev. 1 50.2, 51.1 and 52.7.
(3) Excluding NACE Rev. 1 50.1, 50.3, 51.1, 52.12 and 52.31.

Source: SBS

Again these figures do not provide much insight other than to confirm the size of the relative countries and their respective markets. To study the structure of the enterprises operating within distributive trades it is more prudent to look at ratios such as the average turnover per enterprise. There were only two countries that had average turnover per enterprise above the level of 2 million ECU within Europe; Germany and the United Kingdom. All other countries reported average turnover per enterprise of between 1 and 2 million ECU per enterprise, except for two southern Member States of Italy and Portugal (where averages below 500 thousand ECU were recorded). These figures clearly reflect the high number of small enterprises in the southern Member States and the greater levels of concentration apparent in Germany and the United Kingdom.

If we look in more detail at the ratio of average turnover per enterprise we can see that the low figures reported in Italy, Portugal and Spain originate from the retail trade sector. Average turnover per enterprise within retail trade was lower than the distributive trades' aggregate in each country for which data was available. These figures followed the trend of a lower number of average persons employed per enterprise within retail trade. Only in Germany and the United Kingdom did retail trade enterprises report average turnover of more than 1 million ECU.

Table 2.6

Turnover characteristics in the CECs, 1997

	Albania	Bulgaria	Czech Republic	Estonia	Hungary (1)	Latvia	Lithuania	Poland	Romania (2)	Slovak Republic	Slovenia
Distributive trades: NACE Rev. 1 Section G											
Turnover (million ECU)	391	6,602	53,778	4,791	27,053	4,302	5,894	136,248	21,238	25,019	13,564
Turnover/person employed (thousand ECU)	16.0	22.8	71.6	:	:	40.8	23.9	66.1	:	:	125.6
Turnover/enterprise (thousand ECU)	27.9	67.9	103.4	414.4	682.7	278.7	336.8	135.3	94.0	307.3	588.7
Motor trade: NACE Rev. 1 Division 50											
Turnover (million ECU)	47	668	6,755	725	4,579	463	318	10,872	2,034	1,541	2,651
Turnover/person employed (thousand ECU)	19.7	26.8	90.8	:	:	43.1	17.3	53.3	:	:	139.5
Turnover/enterprise (thousand ECU)	62.8	132.7	236.9	634.6	958.9	374.8	262.4	104.4	169.3	334.9	1,675.8
Wholesale trade: NACE Rev. 1 Division 51											
Turnover (million ECU)	248	4,957	30,625	2,949	16,487	2,594	2,819	84,644	10,618	18,354	5,867
Turnover/person employed (thousand ECU)	34.1	51.1	127.3	67.3	:	92.1	73.8	117.7	:	:	255.1
Turnover/enterprise (thousand ECU)	116.2	225.1	179.8	427.6	730.8	695.4	1,139.0	346.6	205.9	524.6	377.7
Retail trade: NACE Rev. 1 Division 52											
Turnover (million ECU)	96	977	16,399	1,118	5,988	1,245	2,757	40,733	8,375	5,124	5,047
Turnover/person employed (thousand ECU)	6.5	5.8	37.6	:	:	18.7	14.5	35.8	:	:	76.5
Turnover/enterprise (thousand ECU)	8.6	13.9	51.0	317.1	487.2	118.9	199.6	61.9	52.3	122.5	851.0

(1) Revised; for businesses with double-entry book-keeping only.
(2) 1996 for total and retail trade.

Source: National Statistical Offices

For the USA it is possible to calculate ratios of turnover per establishment, where we find somewhat higher figures than in Europe. The average establishment in the USA wholesale activity reported turnover of 7.9 million ECU in 1997. Comparable figures for the motor trade and retail trade were 3.0 and 1.6 million ECU. As these data relate to establishments we can assume that average turnover per enterprise would give even higher figures in the USA. Likewise, data for Japan is also given as the ratio of average turnover per establishment, where we find that in wholesale trade Japanese establishments reported average turnover of 9.9 million ECU, whilst in retail trade the same ratio gave 788 thousand ECU per establishment.

Total turnover in distributive trades in the CECs ranged between 391 million ECU in Albania and 136 billion ECU in Poland. If we compare the data for CECs with those of the EU for ratios such as average turnover per head and average turnover per enterprise we find that the ratios are normally below the figures for the EU countries. Slovenia reported the highest ratios of turnover per head in the CECs.

Table 2.7

Main indicators as a share of turnover in the EEA, 1996 (1)

	B	DK	D (2)	F	IRL	I	L	NL (3)	A	P	FIN	S	UK	IS	NO
Distributive trades: NACE Rev. 1 Section G															
Production value	:	:	:	28.2	22.3	:	19.9	22.4	30.2	:	22.3	:	:	:	30.0
Value added at factor cost	10.6	:	:	13.1	14.3	14.4	12.5	:	15.8	10.8	13.6	13.5	:	:	12.5
Personnel costs	6.4	:	:	:	:	5.8	6.3	7.6	10.9	7.0	8.0	9.4	6.8	:	8.8
Gross investment	:	:	1.5	1.7	2.0	:	:	:	2.4	4.8	2.0	1.8	1.7	:	:
Motor trade: NACE Rev. 1 Division 50															
Production value	:	:	:	26.0	16.1	:	16.0	21.8	30.5	:	19.0	:	:	:	23.1
Value added at factor cost	8.1	:	:	13.5	10.3	11.4	11.4	:	15.8	9.0	12.5	12.0	:	:	10.5
Personnel costs	5.1	:	:	:	:	4.7	5.7	7.3	10.5	6.3	7.4	8.1	6.0	:	7.4
Gross investment	:	:	1.9	1.7	1.0	1.5	:	:	1.9	1.0	2.5	2.2	0.8	:	:
Wholesale trade: NACE Rev. 1 Division 51															
Production value	:	:	:	27.0	21.3	:	17.3	19.4	28.2	:	20.4	:	:	:	31.2
Value added at factor cost	9.5	:	:	10.4	13.4	13.8	10.5	11.2	13.6	10.1	11.8	12.3	:	:	11.1
Personnel costs	5.8	:	:	:	:	5.3	4.8	6.3	9.3	6.4	6.8	8.2	5.2	:	7.4
Gross investment	:	:	1.2	1.1	1.7	:	:	1.5	2.3	7.3	1.9	1.7	1.1	:	:
Retail trade: NACE Rev. 1 Division 52															
Production value	:	31.1	:	31.1	27.6	:	30.4	31.6	34.2	:	28.2	:	:	:	32.6
Value added at factor cost	15.8	:	:	17.2	18.1	17.2	18.9	19.9	20.8	13.2	17.9	17.1	:	:	17.1
Personnel costs	9.2	12.2	:	:	:	7.4	11.1	11.3	14.5	8.6	10.9	12.7	10.2	:	12.6
Gross investment	:	2.7	1.8	2.5	3.1	2.9	:	2.8	2.8	2.9	2.1	1.9	3.2	:	:

(1) Earlier years had to be used for some countries; A (except for production value), P (for personnel costs and gross investment), 1995; D, IRL and FIN, 1997.
(2) Excluding NACE Rev. 1 50.2, 51.1 and 52.7.
(3) Excluding NACE Rev. 1 50.1, 50.3, 51.1, 52.12 and 52.31; wholesale trade, 1997.

Source: SBS

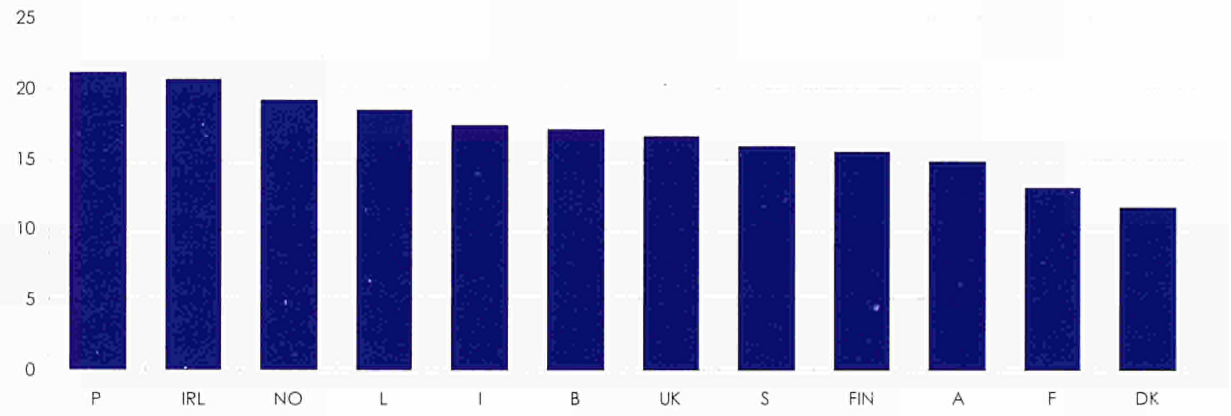
The share of value added in total turnover for distributive trades fluctuated between 10.6% and 15.8% in Europe, according to the country studied. Belgium had the lowest ratio, whilst Austria was at the top of the ranking. If we study the same ratio across the different distribution activities, we find that the share of value added in turnover was usually highest in the activity of retail trade. We should note that the turnover data for wholesale trade are artificially high, as goods are often traded several times and this will lower the ratio for wholesale trade (and to a lesser degree the ratio for motor trade). The share of value added in turnover was in excess of 15% for every country where data was available within the activity of retail trade (except Portugal).

Personnel costs generally accounted for a larger share of turnover in retail trade when compared to the two other distribution activities. The share of personnel costs in turnover for retail trade was found to be in double-digits for all but three countries for which data was available, Belgium, Portugal and Italy. The highest shares were found in Austria, Denmark, Norway and Sweden, where personnel costs accounted for more than 12% of total turnover.

It was interesting to note that the share of investment in turnover was also usually at its highest within the activity of retail trade. We find that only four data cells existed with more than 3.0% for this particular indicator. This was the case in retail trade for two countries: Ireland and the United Kingdom. Despite the retail trade activity having a comparatively high ratio of investment to turnover in Portugal (2.9%), the wholesale trade activity reported even higher shares, some 7.3%.

Figure 2.15

Share of distributive trades' turnover within the motor trade, 1996 (1) (%)



(1) Latest year available.

Source: SBS

If we turn our attention to the share of distributive trades' turnover accounted for by each activity, we find that the largest differentials were observed in the activity of motor trade, where Irish and Portuguese motor retailers reported more than 20% of distributive trades' turnover. Turnover per person employed was highest in the motor trade in Belgium and Luxembourg. Austria, Germany and Luxembourg were the only three countries to report that average turnover per motor trade enterprise was above 2 million ECU.

By far the highest average turnover figures were reported in the activity of wholesale trade. This was true in all countries and reflects to a degree a measurement difficulty with respect to goods that are traded a large number of times before reaching a retail outlet. As such the data over-report the turnover observed in the activity of wholesale trade in relation to the other two distributive trades' activities.

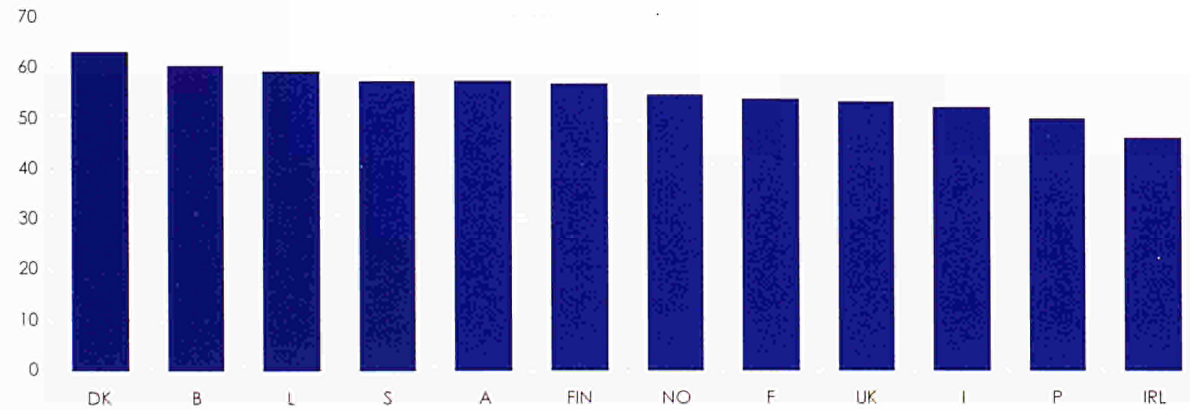
Wholesale trade turnover per enterprise was very high in Germany (7.4 million ECU) when compared to the other European countries, although roughly the same magnitude as in the USA. In fact, the German figure was double the average recorded in the United Kingdom, the second highest European figure (3.8 million ECU per enterprise).

If we turn our attention to the ratio of average turnover per person employed a somewhat different picture emerges in the data presented. Luxembourg and Belgium had the highest turnover per head for wholesale trade, the only two countries with figures of over 500 thousand ECU. Three countries reported average turnover per person employed below the level of 300 thousand ECU; Iceland, Italy and Portugal.

The Benelux and Nordic countries were relatively specialised in wholesale trade if we study turnover specialisation ratios across the EEA, nevertheless, there were fairly low levels of variation from the EEA average. Ireland had the lowest share of turnover within the activity of wholesale trade, more than 15% below the EEA average.

Figure 2.16

Share of distributive trades' turnover within wholesale trade, 1996 (1) (%)

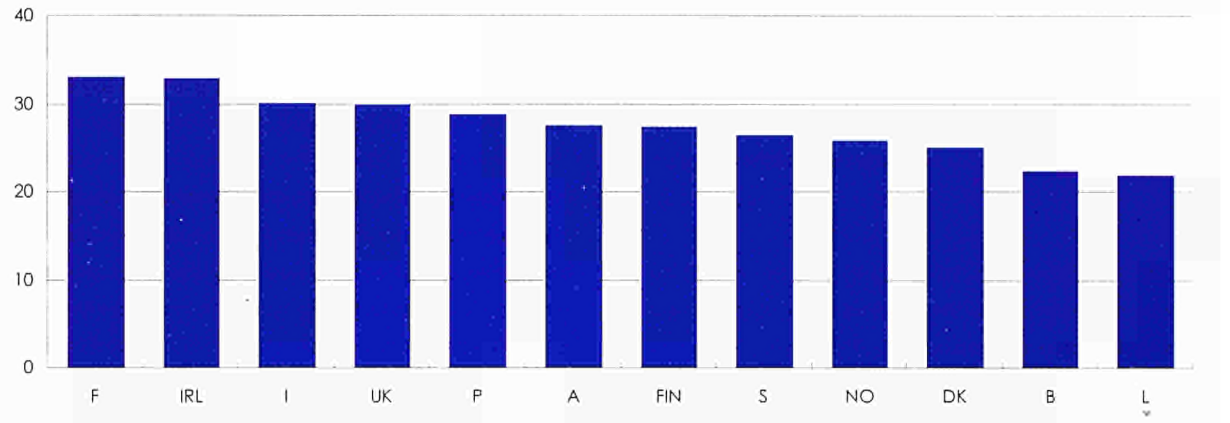


(1) Latest year available.

Source: SBS

Figure 2.17

Share of distributive trades' turnover within retail trade, 1996 (1) (%)



(1) Latest year available.

Source: SBS

Average turnover per person employed was much lower in retail trade than the other two distribution activities. Two countries had figures below 100 thousand ECU per head; the Netherlands and Portugal. It should be noted that these figures may be affected by the share of part-time working in the labour force, as the data takes no account of the number of hours worked by each person employed. Only one country had average turnover per person employed above 175 thousand ECU per head in retail trade, Finland (185 thousand ECU), ahead of France, where each person employed generated sales of almost 174 thousand ECU on average.

The share of turnover accounted for by retail trade was high in Ireland and France. However, no country reported that the share of retail trade turnover in the distributive trades' total was more than 10% above the EEA average. Two countries reported large deviations from the norm on the downside. Both Belgium and Luxembourg had low shares of turnover in the activity of retail trade, almost 30% lower than the EEA average.

Other economic indicators

This final section will present a broad array of indicators which can loosely be grouped under the term of competitiveness indicators. The measures provided are all ratios, allowing comparisons to be made of performance measures across the three distribution activities.

If we begin by looking at the distributive trades' aggregate of NACE Rev. 1 Section G, we find that the lowest personnel costs per employee were recorded in Portugal, where each employee cost on average 9.3 thousand ECU per head.

The highest average personnel costs were recorded in Sweden, where the average employee cost 33.5 thousand ECU. In general, average personnel costs were high in the Nordic economies, with Finland recording the third highest value for average personnel costs (28.6 thousand ECU per head).

Retail trade reported the lowest average personnel costs of the three distribution activities in every country, with the exception of Italy, where average personnel costs were higher in retail trade than they were in the motor trade (21.9 thousand ECU per head compared to 21.8 thousand ECU per head). Average personnel costs were as low as 7.0 thousand ECU in Portugal. One country reported average personnel costs per head above 28 thousand ECU for retail trade, Sweden.

For the purpose of comparison, the US Bureau of Census also reported data for payrolls and number of employees allowing us to derive a ratio of average personnel costs per employee. The American data presented also include all forms of compensation such as salaries, wages, commissions, dismissal pay, bonuses, vacation allowances, sick-leave pay, and employee contributions to qualified pension plans paid during the year. We find a similar trend in the data to that reported in Europe. Wholesale trade had by far the highest average personnel costs per head at 32.7 thousand ECU. Motor trade followed with a far lower figure of 20.6 thousand ECU per employee, whilst retail trade had considerably lower average personnel costs of 13.6 thousand ECU per head. It should be noted that these figures consist of full-time and part-time employees and hence under-report the true values in industries where there is a high propensity to employ on a part-time basis.

In terms of labour productivity, we find that value added per head was above 40 thousand ECU per head in two countries for distributive trades; Finland and Luxembourg. The lowest labour productivity within distributive trades was recorded in Portugal and Italy. The activity of wholesale trade reported the highest ratios of value added per person employed. Indeed, where data was available for all three distribution activities, wholesale trade reported the highest value for each country. Labour productivity in wholesale trade ranged between almost 40 thousand ECU per head in Iceland and just over 60 thousand ECU per head in Luxembourg, except Portugal (18.6 thousand ECU).

Table 2.8

Productivity/competitiveness indicators in the EEA, 1996 (1)

	B	DK	D (2)	F	IRL	I	L	NL	A	P	FIN	S	UK	IS	NO
Distributive trades: NACE Rev. 1 Section G															
Personnel costs (billion ECU)	12.6	:	:	:	:	31.9	0.7	:	13.2	4.6	5.4	13.0	53.7	:	7.4
Personnel costs/ employee (thousand ECU)	31.5	:	:	:	:	24.6	24.9	:	28.0	9.3	28.6	33.5	:	:	25.0
Share of personnel costs in total costs (%)	6.8	:	:	:	:	6.5	6.7	:	11.7	:	8.3	:	7.6	:	9.3
Value added at factor cost (billion ECU)	20.8	:	:	99.1	5.8	78.6	1.5	:	19.3	10.3	9.2	18.8	:	:	10.6
V. added/person emp. (thousand ECU)	36.6	:	:	35.3	27.3	26.7	41.7	:	36.9	13.4	43.5	:	:	:	32.6
Wage adjusted labour productivity (%)	116.3	:	:	:	:	108.9	167.6	:	131.6	:	151.9	:	:	:	130.5
Gross investment in tangible goods (billion ECU)	:	:	14.8	12.6	0.8	:	:	:	2.9	3.1	1.4	2.5	13.5	:	:
Investment/person emp. (thousand ECU)	:	:	3.5	4.5	3.8	:	:	:	5.6	5.2	6.5	:	:	:	:
Gross operating rate (%)	4.2	:	:	3.4	:	8.6	6.1	:	5.0	4.2	5.6	4.1	:	:	3.7
Motor trade: NACE Rev. 1 Division 50															
Personnel costs (billion ECU)	1.7	:	:	:	:	4.5	0.1	2.7	1.9	0.8	0.8	1.8	7.8	:	1.2
Personnel costs/ employee (thousand ECU)	31.5	:	:	:	:	21.8	24.3	26.1	27.2	9.1	28.9	31.9	:	:	26.0
Share of personnel costs in total costs (%)	5.2	:	:	:	:	5.0	6.0	:	11.0	:	7.6	:	6.4	:	7.6
Value added at factor cost (billion ECU)	2.7	:	:	13.4	0.9	10.8	0.2	:	2.8	1.8	1.3	2.7	:	:	1.7
V. added/person emp. (thousand ECU)	35.2	:	:	32.0	28.8	24.9	42.6	:	37.6	13.3	42.1	:	:	:	33.7
Wage adjusted labour productivity (%)	111.8	:	:	:	:	114.5	175.4	:	138.1	:	145.9	:	:	:	129.9
Gross investment in tangible goods (billion ECU)	:	:	2.2	1.7	0.1	1.4	:	:	0.3	0.1	0.3	0.5	1.0	:	:
Investment/person emp. (thousand ECU)	:	:	4.7	4.1	2.7	3.3	:	:	4.6	1.3	8.5	:	:	:	:
Gross operating rate (%)	3.0	:	:	2.8	:	6.6	5.7	:	5.3	3.3	5.2	3.9	:	:	3.1

(1) Earlier years had to be used for some countries: NL and A, 1995; D, IRL and FIN, 1997.
(2) Excluding NACE Rev. 1 50.2, 51.1 and 52.7.

Source: SBS

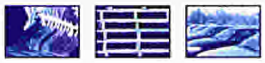


Table 2.8

Productivity/competitiveness indicators in the EEA, 1996 (part 2) (1)

	B	DK	D (2)	F	IRL	I	L	NL	A	P	FIN	S	UK	IS	NO
Wholesale trade: NACE Rev. 1 Division 51															
Personnel costs (billion ECU)	6.9	:	:	:	:	15.3	0.3	:	6.6	2.2	2.6	6.6	21.8	:	3.4
Personnel costs/ employee (thousand ECU)	40.8	:	:	:	:	28.3	31.9	:	35.8	12.2	35.3	39.4	:	:	33.8
Share of personnel costs in total costs (%)	6.1	:	:	:	:	6.1	5.1	:	10.0	:	7.0	:	5.6	:	8.0
Value added at factor cost (billion ECU)	11.2	:	:	42.6	2.5	39.6	0.7	:	9.6	4.8	4.6	9.9	:	0.3	5.1
V. added/person emp. (thousand ECU)	51.9	:	:	45.3	50.2	39.9	60.7	:	49.6	18.6	57.3	:	:	39.6	47.9
Wage adjusted labour productivity (%)	127.2	:	:	:	:	140.6	190.2	:	138.4	:	162.2	:	:	:	141.7
Gross investment in tangible goods (billion ECU)	:	:	6.9	4.6	0.3	:	:	:	1.7	2.5	0.7	1.4	4.7	:	:
Investment/person emp. (thousand ECU)	:	:	5.2	4.9	6.3	:	:	:	8.5	13.2	9.2	:	:	:	:
Gross operating rate (%)	3.6	:	:	2.4	:	8.5	5.7	:	4.3	4.2	5.0	4.1	:	:	3.7
Retail trade: NACE Rev. 1 Division 52															
Personnel costs (billion ECU)	4.0	3.0	:	:	:	12.1	0.3	:	4.8	1.6	2.0	4.7	24.1	:	2.8
Personnel costs/ employee (thousand ECU)	22.6	17.8	:	:	:	21.9	20.0	:	21.7	7.0	22.9	28.0	:	:	18.7
Share of personnel costs in total costs (%)	9.9	12.7	:	:	:	8.1	12.1	:	15.5	:	11.5	:	12.4	:	13.1
Value added at factor cost (billion ECU)	6.9	:	:	43.1	2.4	28.2	0.5	:	6.8	3.6	3.3	6.3	:	:	3.7
V. added/person emp. (thousand ECU)	25.0	:	:	29.9	18.3	18.7	28.2	:	27.0	9.8	33.0	:	:	:	22.5
Wage adjusted labour productivity (%)	110.6	:	:	:	:	85.1	140.7	:	123.9	:	143.8	:	:	:	120.3
Gross investment in tangible goods (billion ECU)	:	0.7	5.6	6.3	0.4	4.7	:	:	0.9	0.5	0.4	0.7	7.7	:	:
Investment/person emp. (thousand ECU)	:	3.5	2.1	4.4	3.1	3.1	:	:	3.7	1.7	3.8	:	:	:	:
Gross operating rate (%)	6.6	4.6	:	5.1	:	9.8	7.7	:	6.3	4.9	6.9	4.3	:	:	4.4

(1) Earlier years had to be used for some countries: NL and A, 1995; D, IRL and FIN, 1997.
(2) Excluding NACE Rev. 1 50.2, 51.1 and 52.7.

Source: SBS

It is perhaps more prudent to look at the ratio of wage adjusted labour productivity, which adjusts the traditional measure of labour productivity by dividing through by personnel costs per employee, adjusted to take account of working proprietors and family workers. The highest wage adjusted labour productivity was recorded in Luxembourg, where value added covered personnel costs by almost 70% within distributive trades. In Italy the lowest wage adjusted labour productivity for distributive trades was recorded, whereby value added covered personnel costs by only 9%.

Looking at the individual activities similar trends were found, with Luxembourg reporting the highest wage adjusted labour productivity ratios for all three distribution activities (except retail trade, Finland). Italy reported the lowest ratio for retail trade, where value added was equal to only 85% of personnel costs.

Gross investment was usually higher in wholesale trade than in retail trade. This was however not the case in three countries, France, Ireland and the United Kingdom where the level of investment in retail trade was higher. The highest level of investment recorded in any country was found in the activity of retail trade in the United Kingdom, where investment was above 7.7 billion ECU. Despite this being the highest level of investment, the ratio of investment per head remained relatively low at only 2.4 thousand ECU per head (estimate).

Within the CECs investment was at its highest in the Czech Republic, where not only investment per head but also total gross investment were higher than in Poland within the retail and motor trades. The Czech Republic reported investment per head ratios of almost 2 thousand ECU per head in 1997 in retail trade.

The ratio of gross operating rate is the nearest measure that the data within the SBS Regulation can provide with respect to an indicator of profitability. The indicator provides a measure of the gross operating surplus divided by turnover. By far the highest gross operating rates were recorded in Italy, the only country to be able to report figures near 10% (for both wholesale and retail trade). However, considering that less than half of the workforce in Italy were employees, we should consider that a sizeable share of the gross operating surplus was used "to pay" proprietors and family workers. Of the other countries for which data was available, it was possible to note the low gross operating rates of France and Norway within the whole of distributive trades (below 4%).

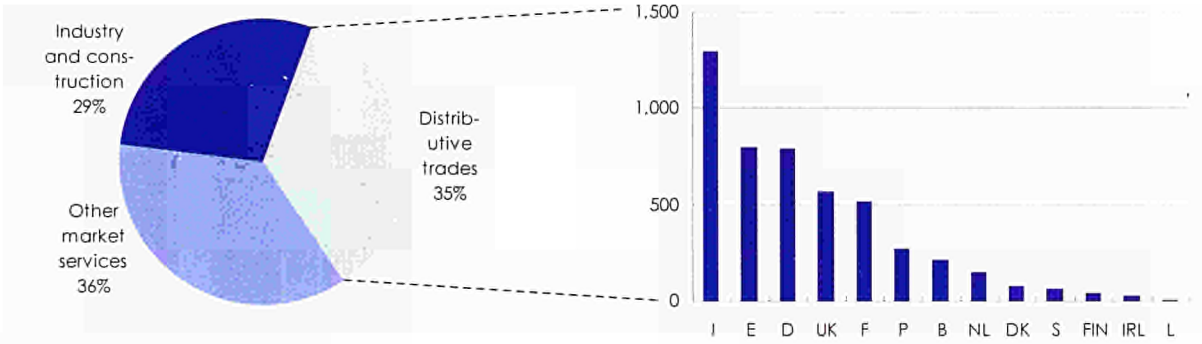
Size of enterprises

This section will draw on information taken from the Eurostat database on small and medium-sized enterprises (referred to as SMEs). The information that is provided uses the NACE Rev. 1 classification of economic activities, whereby distributive trades are grouped under the Section G heading, "wholesale and retail trade; repair of motor vehicles, motorcycles and personal and household goods". The data presented in this section refer largely to the aggregate of Section G, for more details regarding the three NACE Rev. 1 Divisions that make up distributive trades, please refer to the sectoral analysis later in this publication.

The share of distributive trades' enterprises in the total business population (comprising industry, construction and market services) was some 35% in 1995. Corresponding figures for the other economic activities showed that there were less enterprises operating in industry and construction than there were in commerce. Other market services accounted for slightly more enterprises than distributive trades. The average size of each distributive trades' enterprise was therefore clearly below average, with just over 15% of all occupied persons employed in an activity that had 35% of all enterprises.

Figure 2.18

Number of enterprises in distributive trades in the EU, 1995 (1) (thousands)



(1) Earlier years had to be used for some countries.

Source: SME

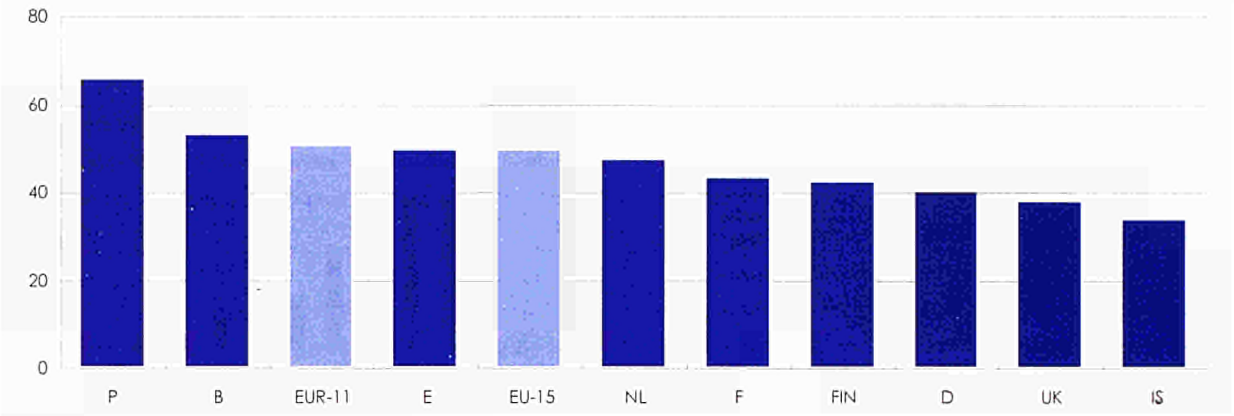
If we look at the number of enterprises within each Member State, we find that Italy had by far the highest number of enterprises, the only country with more than one million enterprises. The second highest number of enterprises within distributive trades was found in Spain, ahead of Germany. The ranking of countries by number of enterprises then took another step down to the United Kingdom and France. No other EU Member State had more than 300 thousand enterprises active within this area of the economy. It was however interesting to note the comparatively high number of enterprises in Portugal. Furthermore, there were very low numbers of enterprises reported throughout the Nordic countries, perhaps due to the low population density of these countries.

Another way of establishing the importance of the distributive trades' enterprise population is to examine the share of distributive trades' enterprises in the market services' total. We have just noted the high number of enterprises in Portugal, their importance to the Portuguese services' economy is confirmed by this ratio. We find that 65% of all Portuguese market services' enterprises were active in the area of distributive trades, well above the country with the second highest share, Belgium (52.6%). No other country had more than half of its market services' enterprises within the activity of distributive trades.

Nevertheless, the EU average reported that 49% of all enterprises in market services were active within distributive trades. There was limited data availability for this particular indicator, however for the countries where data existed three reported shares less than 40%; Germany, the United Kingdom and Iceland (39.8%, 37.6% and 33.4% respectively). It is of interest to compare the two countries at either extreme of this ranking, with one third of market services' enterprises active in distributive trades in Iceland, whilst two-thirds of the market services' enterprise population was found in distributive trades in Portugal.

Figure 2.19

Enterprises in distributive trades as a share of the market services' total, 1995 (1) (%)



(1) Earlier years had to be used for some countries.

Source: SME

Number of enterprises by size class

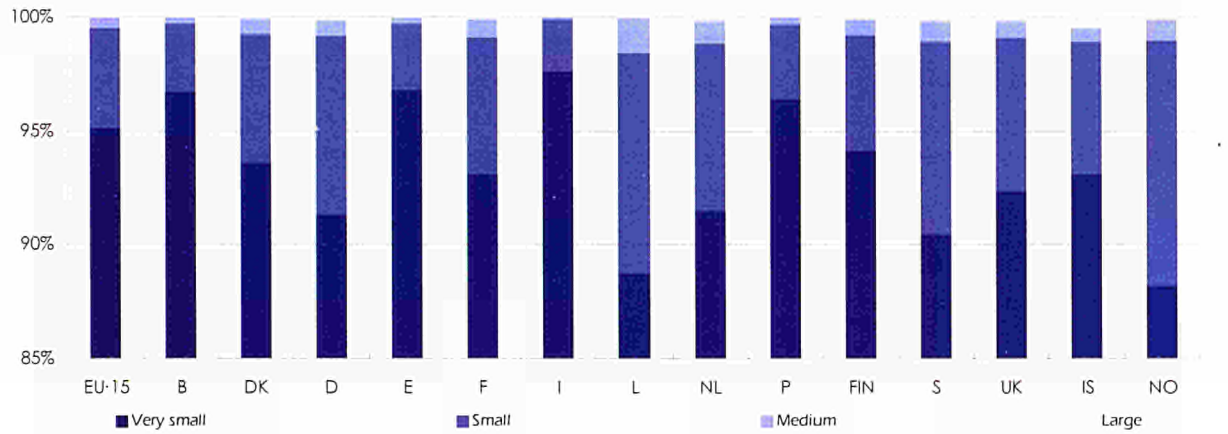
We should not be surprised to find that small-sized enterprises played an important role in the activity of distributive trades within the European economy. Italy, Spain, Belgium and Portugal all reported that very small enterprises (i.e. enterprises with between 0 and 9 employees) accounted for more than 96% of the enterprise population (there was no data available for Greece).

Figure 2.20 gives the breakdown of enterprises in distributive trades by size class, ranked according to the number of very small enterprises. Only two countries reported that less than 90% of the enterprise population were very small; Luxembourg and Norway (with respective shares for very small enterprises of 88.2% and 88.7%). These two countries did however report the two highest shares of small enterprises (i.e. enterprises with between 10 and 49 employees).

Although the figures for large enterprises give very low shares in percentage terms, these enterprises often account for a large share of economic activity and employment. Countries that reported a comparatively high share of large enterprises included Iceland, the Netherlands, the United Kingdom, Sweden and Germany.

Figure 2.20

Number of enterprises in distributive trades broken down by enterprise size class, 1995 (1)



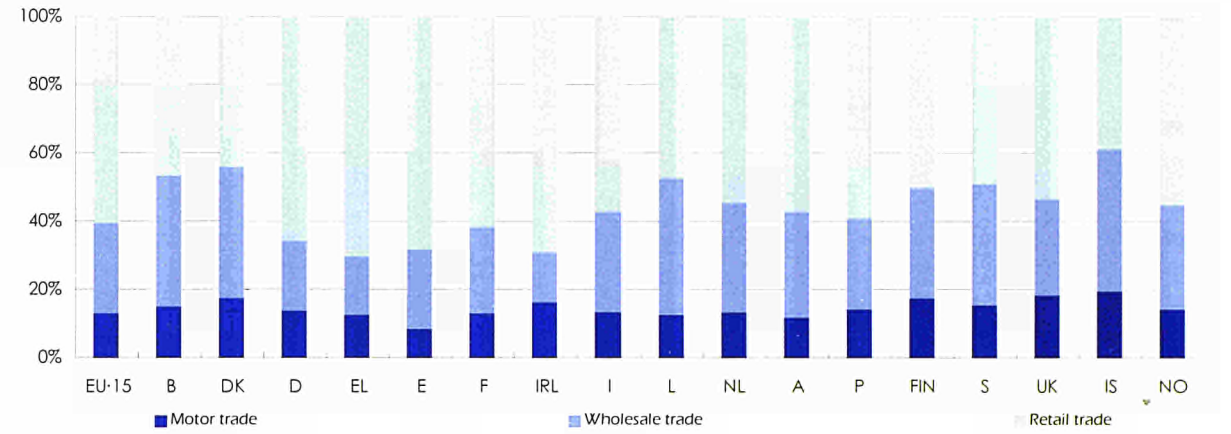
(1) Please note that the scale starts at 85%, with very small enterprises always accounting for more than 85% of the total number of enterprises; earlier years had to be used for some countries; very small (0-9 employees); small (10-49 employees); medium (50-249 employees); large (250 or more employees).

Source: SME

Before examining the breakdown of enterprises between activities, it is important to draw attention to the fact that the retail and wholesale functions are becoming less clear. This is a result of increasing competitive pressure that has led many large retailers to set-up their own distribution networks. On the other hand, some wholesalers (for example, fashion houses) have started to set-up retail outlets to control more closely their brand identity. This change in behaviour complicates the measurement of economic activity within commerce, especially between activities. Nevertheless, Eurostat are currently studying the breakdown of turnover within trading enterprises.

Figure 2.21

Breakdown of the number of enterprises in distributive trades, 1996 (1)

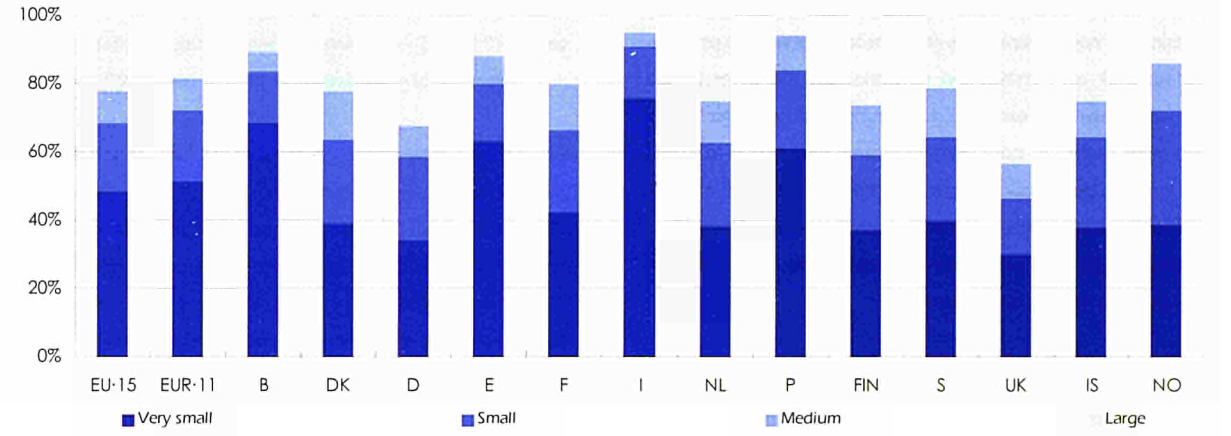


(1) Estimates.

Source: SBS

Figure 2.22

Number of persons employed in distributive trades broken down by enterprise size class, 1995 (1)



(1) Earlier years had to be used for some countries; very small (0-9 employees); small (10-49 employees); medium (50-249 employees); large (250 or more employees).

Source: SME

Number of persons employed by size class

If we look at the relative shares of the different size classes in the employment total, we find that there are wide-ranging differences across the EU. The structure of employment within distributive trades' enterprises varied considerably between Member States. On the one hand the southern Member States and Belgium reported that more than 60% of their employment was found in very small enterprises. However, if we look at employment within large enterprises (250 or more employees), we find that more than 30% of the total number of persons employed were in large enterprises in both Germany and the United Kingdom.

A closer study of this data shows that in Italy the number of persons employed in very small enterprises rose as high as 76%, with a further 15% employed within small enterprises (with between 10 and 49 employees). In other words, more than 90% of the persons employed in Italy in distributive trades were working in enterprises with less than 50 employees. Comparable figures for Belgium, Spain and Portugal showed that more than 80% of all persons employed were found in enterprises with less than 50 employees.

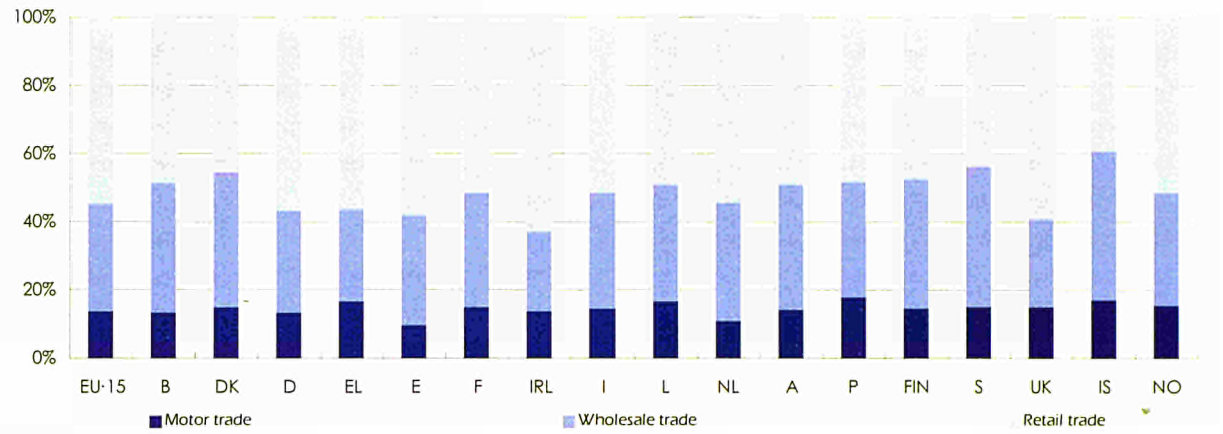
If we turn our attention to the number of persons employed in enterprises with more than 50 employees (i.e. medium and large sized enterprises) we find that only one country in the EU had a majority of persons employed in this category. The United Kingdom reported that there were 53.3% of all persons employed in medium and large-sized enterprises, well ahead of Germany where there were 41.3%. Finland was the only other country to have more than 40% of its persons employed in these two categories.

At the other extreme, less than 6% of the total number of persons employed in Italy and Portugal were working in large enterprises (with 250 or more employees). These figures were considerably lower than in any other Member State, with Belgium, Spain and Norway reporting the next lowest shares (between 10.4% and 13.7%). All other countries reported that between 19.9% and 26.1% of the total number of persons employed were working in large enterprises.

Employment within medium-sized enterprises did not generally account for a large share of total employment, with most countries reporting that this size class accounted for less than 10% of total employment in distributive trades. However, the Nordic countries provided an exception to this rule. In Denmark, Norway, Finland and Sweden more than 14% of the total number of persons employed were found in medium-sized enterprises (with between 50 and 249 employees).

Figure 2.23

Breakdown of employment in distributive trades, 1996 (1)

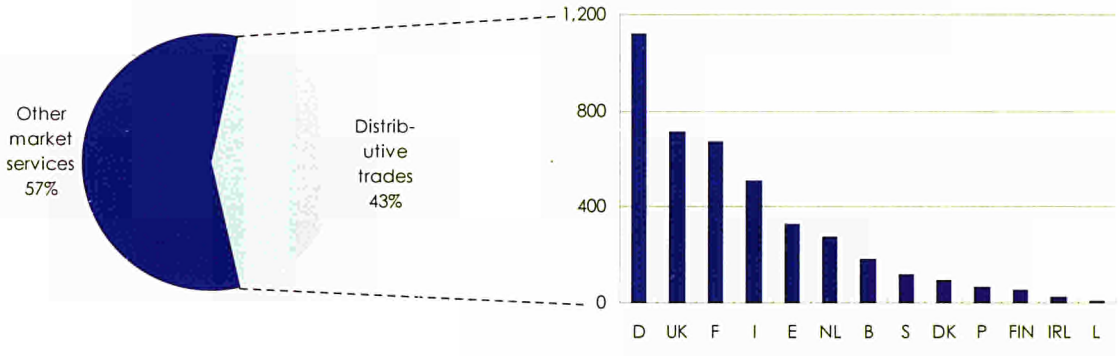


(1) Estimates.

Source: SBS

Figure 2.24

Turnover in distributive trades in the EU, 1995 (1) (billion ECU)



(1) Earlier years had to be used for some countries.

Source: SME

Turnover by size class

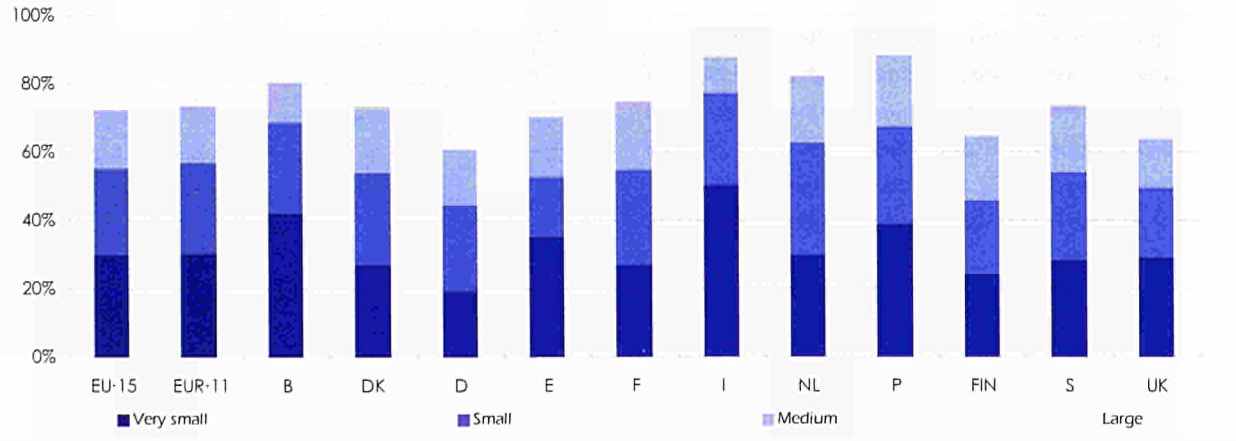
Distributive trades accounted for 43% of total turnover in the market services economy of the EU in 1995. This share was somewhat below the EU figure for employment (49% of the market services' total).

Turnover was distributed quite evenly across the different size classes within the EU, with very small enterprises accounting for almost 30% of total turnover, large enterprises 28%, small enterprises a further 25% and the remaining 17% accounted for by medium-sized enterprises.

The distribution of turnover between different size classes generally gave higher importance to large enterprises in the majority of countries when compared to the share of large enterprises in the total number of persons employed. This trend may be interpreted as proof of higher average turnover per head for persons employed in large enterprises. The EU figures showed that the share of turnover attributable to large enterprises was 5.5 percentage points higher than the corresponding share of employment. The highest difference was recorded in Spain, where large enterprises accounted for almost 30% of total sales, whilst employing less than 12% of the Spanish distributive trades' workforce. There were only two countries that did not follow this trend, they were the United Kingdom and the Netherlands. In the United Kingdom large enterprises accounted for 36.5% of total turnover, whilst they employed more than 43% of the distributive

Figure 2.25

Turnover in distributive trades broken down by enterprise size class, 1995 (1)

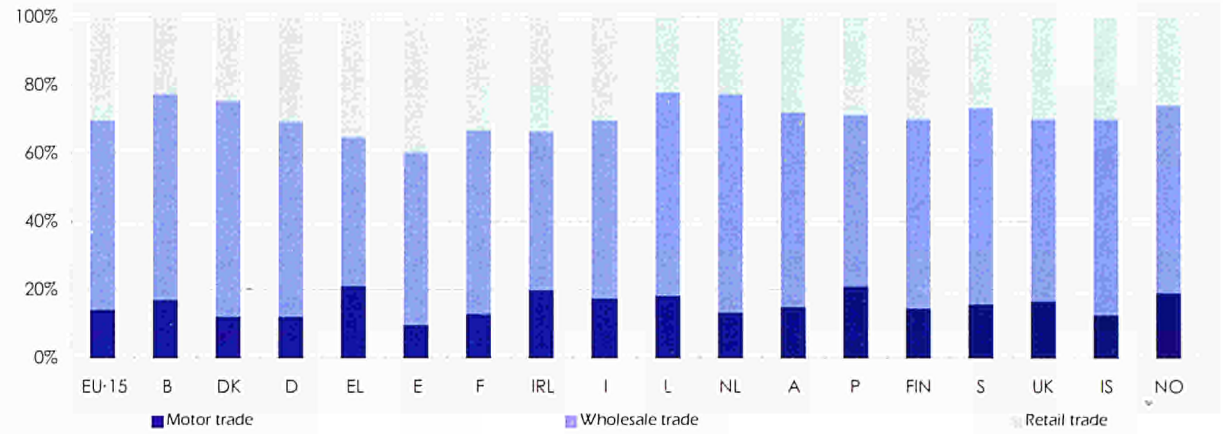


(1) Earlier years had to be used for some countries; very small (0-9 employees); small (10-49 employees); medium (50-249 employees); large (250 or more employees).

Source: SME

Figure 2.26

Breakdown of turnover in distributive trades, 1996 (1)



(1) Estimates.

Source: SBS

trades' workforce. These two countries both had high levels of part-time employment, which if concentrated in large enterprises may explain this anomaly.

Very small and small enterprises still accounted for a sizeable share of turnover in the southern Member States. In Italy turnover in very small enterprises accounted for more than half of total turnover, with small enterprises accounting for a further 27%. Portugal and Belgium joined Italy as the only other EU countries where small and very small enterprises together accounted for more than 65% of total turnover. It was therefore no surprise to find that Portugal and Italy reported the lowest shares of turnover accounted for by large enterprises (just 11.8% and 12.4% respectively). The importance of very small enterprises in terms of generating turnover was reduced in Germany, with only 19.2% of the total, almost 5 percentage points lower than the next country in the ranking, Finland with 24.1%. Germany, France and the Netherlands were the only three countries to report a higher share of total turnover for small enterprises when compared to very small enterprises.

Market structure and performance

Distributive trades may be seen as the economic interface between the producers of goods and consumers. Whether production takes place within or outside of Europe, the final consumer is often unaware of where a product has been made. Even more unlikely is that the consumer is aware of the route that the goods have taken to get from the producer to the final retail outlet. There are nevertheless a wide range of important differences in the structure of commerce across the EEA. This is demonstrated not only by the range of products on offer within retail sales outlets, but also in relation to the sales formats used and the structure of the firms operating within the market.

The challenges that affect the structure, conduct and performance of the distributive trades' sector within the European economy are numerous. This analysis will look at a limited number of important factors that have played or will play an important role in shaping the sector, amongst them:

- demand trends;
- competitive pressures;
- and changes to Community legislation.

Market demand

There are a number of factors that contribute to market demand. Demand-side factors often quoted as encouraging the development of new businesses in commerce include market size, the national standard of living, population density, the proportion of working women and the level of car ownership.

Despite the fact that there are an increasing amount of foreign brands and products available across Europe: local tastes, different rules and regulations regarding opening hours and different standards of living and lifestyles have led to very specific trends in commerce. Most of these trends may be explained as a combination of sociological, legislative and economic differences between countries. These factors result in the structure of commerce changing noticeably across Europe, with respect to the number of enterprises, their size and distribution and their economic importance.

Table 3.1.1

Consumption of major household items in the EU (% of total household expenditure)

	1984	1994
Food, beverages and tobacco	23.1	18.2
Clothing and footwear	6.8	6.9
Furniture and household equipment	7.1	7.7
Recreation and entertainment	8.2	8.8
Rent, fuel and power	18.3	19.6
Transport and communications	14.6	15.2
Medical and health care	7.3	8.8
Miscellaneous	14.6	14.9

Source: National Accounts

Household expenditure and consumer prices

Looking at household consumption within the EU we find that the largest share of expenditure is accounted for by the grouping of food, drink and tobacco. Within the EU this group has seen its share of total expenditure reduced in recent years. The share of food, drink and tobacco in total household consumption fell by 5 percentage points between the mid-eighties and mid-nineties from 23.1% to 18.2%. Over the same period there was moderate growth in other items sold in commercial outlets, such as clothing, furniture and household equipment.

A comparison with the shares of household consumption in other Triad countries shows that the trend in Japan followed closely that of Europe, whereby a decline for food, drink and tobacco of nearly 4 percentage points was registered. The reduction observed in the United States was not quite as pronounced. However, the American figure started at a much lower level. In 1984 food, drink and tobacco accounted for less than 15% of total household consumption in the USA. This figure had fallen to just over 11% by the mid-nineties (also a marked decline).

Within the Member States food, drink and tobacco accounted for over 30% of total household expenditure in Ireland in 1997. Portugal was close behind with 27%. These rates were more than 5 percentage points above those seen in any other EU country. At the opposite end of the spectrum the Netherlands recorded less than 15% of total household consumption accounted for by food, drink and tobacco.

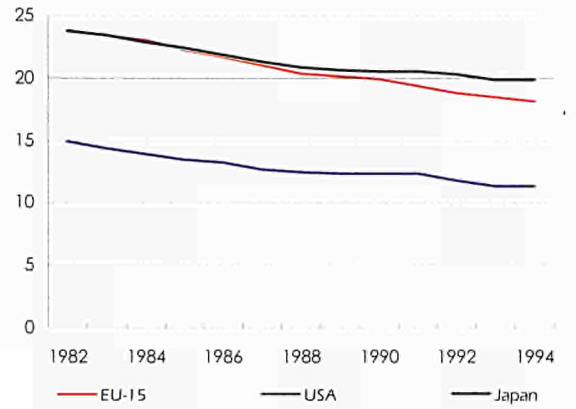
One important determinant of demand is price. Eurostat are able to provide harmonised price indices for European countries. Despite the fact that there has been some convergence of prices within the EU, there are still notable differences between Member States. For example, the fastest growth in prices was recorded in Greece, where the price of consumer goods has risen by more than 10% during the three-year period 1996 to 1998.

Food expenditure was highlighted above as the largest share of household expenditure in many countries. Spain was the country where the differential between the general index of consumer prices and the price index for food and non-alcoholic beverages was at its largest. The consumer price index in Spain rose by 3.3 percentage points more than the index relative to food and non-alcoholic beverages. Hence, we may observe that as the relative consumption of food has been declining, prices have also followed a declining trend in relative terms. In Norway the converse was true, with food prices rising by 3.4 percentage points more than the general index of consumer prices between 1996 and 1998.

We may conclude that expenditure on food is steadily declining across all Member States as a share of total household expenditure. This trend may be expected to continue as earnings rise at a faster pace than retail price increases, population growth continues to stagnate and further competitive pressures result in increased price competition within the sector.

Figure 3.1.1

Share of food, drink and tobacco in total household consumption (%)



Source: National Accounts

Females in paid employment

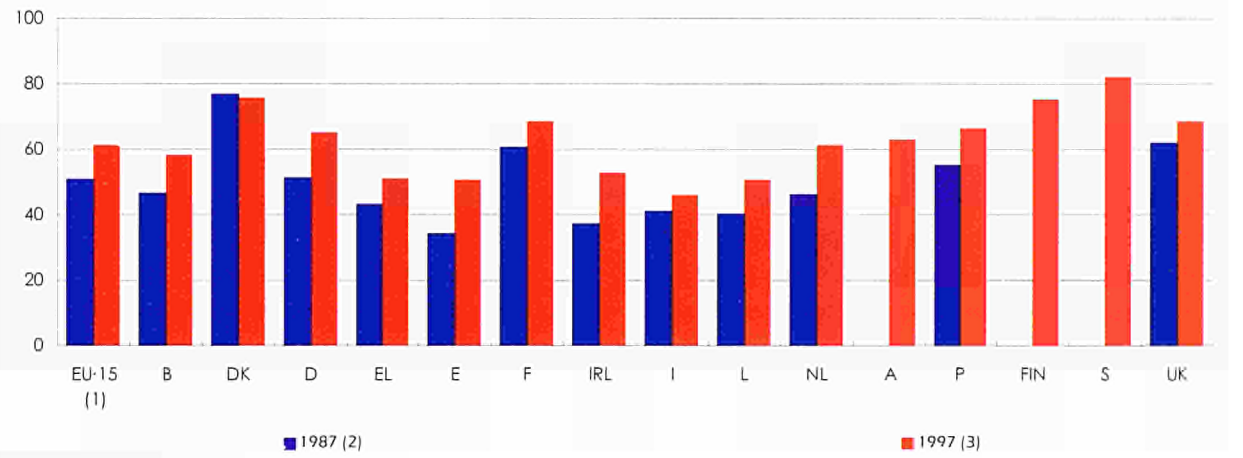
One reason often cited for the development of different market structures across Europe is the role of females in the labour force. Figure 3.1.2 shows the number of active females in the labour force as a percentage of the total number of females aged between 25 and 64, the European average was equal to 61.2% in 1997. There are nevertheless large discrepancies between the countries: with the lowest activity rates found in Greece, Ireland, Italy, Luxembourg and Spain, where less than 53% of all females between 25 and 64 actively sought work or were working. Italy reported the lowest activity rate for females equal to 46.1% in 1997. There were four countries where the differential between the activity rate for the total population (again aged 25-64) and that for females was noticeably higher. Greece, Ireland, Italy and Luxembourg all reported a difference of at least 16 percentage points between the activity rates of females and the total population.

At the other extreme there were less than 6 percentage points difference between the female and total activity rates in Denmark, Finland, Norway and Sweden. These same countries also reported the highest female activity rates (above 75%). France, Germany and the United Kingdom reported female activity rates well above the EU-15 average (with activity rates of 65.0%, 68.7% and 68.4% respectively).

As the participation of females in the labour force increases the leisure time available to go shopping will usually decrease. This results in less frequent visits to retail outlets. This trend is particularly evident in northern Member States, where food shopping often takes place on a weekly or even monthly basis (in large non-specialised stores) as opposed to daily visits to a number of small specialist retailers, which is often seen in southern Member States.

Figure 3.1.2

Female activity rates — (% of female population, 25-64 years old)



(1) EU-12 for 1987.
(2) A, FIN and S not available.
(3) 1998 for DK, D, EL, E, F and L.

Source: LFS

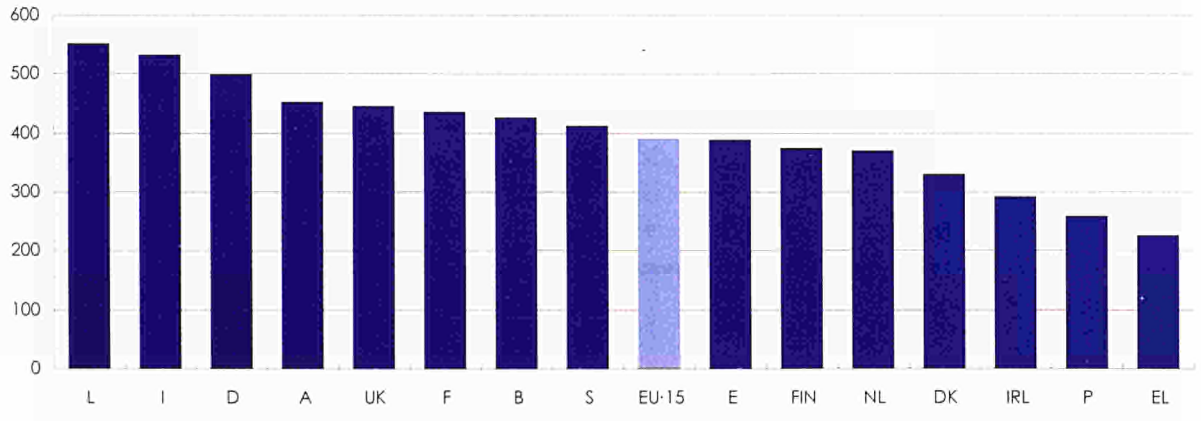
Private car ownership

Another demand factor that plays a direct influence on the structure of commerce is the number of cars in private ownership. As the population becomes increasingly mobile, the location of retail outlets becomes less limited. Although this trend started with the development of large grocery related developments it has since spread to shopping centres with large numbers of retail outlets, as well as specialist stores for items such as electrical goods, do-it-yourself (D-I-Y) and garden accessories. Figure 3.1.3 shows the level of private car ownership across the Member States. We can see that the rates are generally highest in the northern Member States where concentration of retail outlets is also at its highest (Denmark and the Netherlands show low rates, perhaps due to the high levels of taxation on cars). Private car ownership follows to a large extent the distribution of GDP per capita.

Within the EU, the highest rate of ownership is found in Luxembourg where there are 554 cars per 1,000 inhabitants (Germany and Italy are the only other countries with a figure above 500). At the other extreme we find Greece, Ireland and Portugal (all with less than 300 cars per 1,000 inhabitants). The EU average is situated at just under 400 cars per 1,000 inhabitants.

Figure 3.1.3

Private car ownership, 1997 ——— (number of cars per 1,000 inhabitants)



Source: VDA

Urban land use has been modified such that many enterprises operating within the distributive trades' sector of the economy are now found on arterial routes leading out of city centres. This trend has been amplified as many city centres have become congested with the increase in private car ownership, whilst improved roads have facilitated access to out-of-town shopping centres.

One downside of increased mobility through private car ownership has been the marginalisation of rural businesses. As retail outlets become increasingly concentrated, some members of society are faced with little or no choice for shopping. The depopulation of rural areas towards urban conurbations has left a marked effect on the structure of enterprises.

Commerce can however play a significant role in rural areas: for example, not only do commercial outlets often act as the hub of village life and serve the local community, they also offer a natural outlet for local craftsmen for their products. Indeed, often the only way for small rural enterprises to survive has been through diversification, whereby small village outlets act as multi-purpose shopping facilities, diversifying out of grocery products to act as a bank, post office or newsagent at the same time.

Competitive pressures

Price competition has in general benefited larger enterprises, as they have brought scale economies to bear in functions such as procurement, information management, marketing, logistics and finance. Smaller enterprises tend to compete more in relation to economies of scope, whereby they aim to match consumer needs within the local market to the service that they provide. However, with the advent of information technology it is possible for larger enterprises to change their product mix for individual units in accordance with local tastes. By doing so large enterprises have eroded part of the competitive advantage enjoyed by small retailers.

In response to increased competitive pressures, many small enterprises have turned to alliances and joint ventures (such as co-operatives, networks and franchising) in an attempt to improve economies of scale for a number of functional activities, such as purchasing, marketing, finance and information management.

One visible result of increased competition has been that traders have started to develop specific strategies to meet consumer demands. These have been manifest through the introduction of new commercial solutions, such as discount food stores (for quick and cheap purchases), leisure/attraction stores, stores with innovative or design-related products or stores that promote a high degree of customer advice and service. At the level of the retail outlet a number of new concepts have been introduced, for example, self-scanning, premium retail brands and store cards. The vast majority of these initiatives are designed to gain market share, although given the openness of most activities within retail trade, it is relatively easy for competitors to duplicate and build on new innovations. Changes in store format and services are not just a result of meeting consumer demand, they are also based around issues such as transport and stock control issues (which are becoming increasingly relevant for competitiveness).

Other areas that are important for the competitiveness of commerce include management practices. Recent years have seen a trend towards a re-appraisal of functions such as logistics, transport, purchasing, finance and advertising. This process has been quickened by the increasing role of management consultants within the industry, with the result that there has been some convergence in operating practices. This has been re-enforced by increased merger and acquisition activity from the mid-nineties onwards, which has led to ownership becoming more centralised (especially in food retailing).

Another area that is important to the competitiveness of enterprises and the sector in general is that of the environment. Environmental concerns affect some consumers in their choice of product, for example, cosmetics not tested on animals or packaging that uses recycled materials. Enterprises within distributive trades can also play a role by developing more environmentally aware solutions to logistics and transport systems.

Market trends in the retail food trade

We have already seen the importance of food products in relation to household consumption. This section will look exclusively at the retail food trade within Europe and the main European groups operating within this market. Europe's largest retailers in the retail food trade occupy the majority of the top ten positions in a list of global players (they are exclusively German and French groups). Within other sectors of retailing the process of internationalisation has largely been limited to a few specific areas, such as furniture retailing.

The top 50 players in the European retail food trade accounted for 70% of the food market in 1997. The top 20 accounted for just over half of the market (as measured by turnover). Within wholesale food activities, the levels of concentration were not as marked. The turnover of the top 20 enterprise groups was equal to some 178 billion ECU in 1996, with concentration levels about half of those seen in retail trade.

Looking at national markets the north/south divide was again evident, with the top five food retailers accounting for more than 95% of turnover in Luxembourg, Sweden and Norway. Within the largest Member States the following concentration ratios were recorded, Germany (63.0%), the United Kingdom (61.7%), France (60.9%), Spain (32.7%) and Italy (22.6%). The markets of central Europe also showed less concentration than the northern Member States with less than 10% of turnover accounted for by the top five enterprise groups in Slovakia and Poland.

Table 3.1.2
Top 10 in the European retail trade of food in terms of turnover, 1997 (million ECU)

Metro	50,765
Intermarché	30,880
Rewe	29,277
Promodès	28,205
Auchan	25,669
Tesco	24,848
Aldi	24,587
Edeka	22,942
Leclerc	21,395
Carrefour	20,842

Source: M+M Eurodata

Retail outlets for food have clearly led the phenomenon for growth through internationalisation within commerce. The penetration of a foreign market is normally achieved through exporting a trusted method of commercialisation, in other words a concept that has proven its worth at a national level. An alternative strategy is to obtain market expansion through acquisition. This trend started to become important in the mid-nineties and has grown over subsequent years. Growth through acquisition allows rapid expansion and may allow benefits to be realised through the rationalisation of purchasing functions or distribution and logistics networks.

There have been three main trends in the development of the European retail food trade with increased roles for international multi-cultural brands, national or regional specialities and low-cost discount lines. However, the strategies that have been pursued across Europe vary considerably according to the country in question.

In Germany there is a high propensity for discount food retailing, whereby price would appear to be the determining factor in gaining market share. Indeed, food retailing in Germany has been subjected to important price competition as the main form of market competition. Very large retail food stores are a fairly recent phenomena, that have been encouraged by recent changes to the laws on opening hours and a relaxation of planning permission (which have in turn led to the development of out-of-town centres, such as Oberhausen).

Table 3.1.3
Turnover in the European retail trade of food, 1997

	Turnover (billion ECU)	Share of discount stores (%)	Share of own brands (%)	Share of top 5 food retailers (%)
EU-15	535.9	:	:	19.5
B	15.5	24.7	21.0	67.6
DK	10.6	20.0	18.0	77.0
D	121.2	29.5	21.0	63.0
EL	5.7	:	:	35.1
E	33.2	:	12.0	32.7
F	105.9	7.4	23.0	60.9
IRL	5.9	:	:	52.3
I	67.4	10.4	10.0	22.6
L	0.6	:	:	96.3
NL	19.9	12.4	21.0	65.2
A	11.8	16.5	:	74.7
P	7.6	9.2	:	51.6
FIN	10.5	11.0	:	88.2
S	16.0	:	20.0	96.8
UK	104.1	11.4	38.0	61.7
Norway	10.1	37.0	:	98.5
Switzerland	17.3	:	31.0	84.3
Czech Republic	5.2	:	:	18.4
Hungary	3.8	:	:	41.3
Poland	18.8	:	:	8.8
Slovakia	2.7	:	:	9.9

Source: M+M Eurodata

In the United Kingdom there has been a sizeable increase in the development of own brands (which now account for almost 40% of all retail food trade). This trend has meant that many retailers have continued to supply only one or two leading brands, putting pressure on producers. As own brands have successfully gained market share, large manufacturers have been forced to diversify into higher value products. One of the few product lines where this phenomenon does not exist is washing powder for clothes, where the research and development costs dissuade retailers from investing. However, most leading products are open to imitation from competitors, with the development of own brands particularly prevalent in low-cost items, whilst luxury items tend to remain the domain of brand leaders.

United Kingdom food retailers have been reluctant to diversify into non-food activities. This may in part explain why retail outlets in the United Kingdom are generally somewhat smaller than those seen in France and Germany (where non-food product lines are also supported).

For more information:

The detailed analysis of retail food trade within Europe provides data for both retailers and wholesalers, trading organisations and co-operatives. The information provided also includes profiles of the main players within the national European markets, giving valuable information on sales formats and sales areas. The information presented has been kindly provided by M+M Eurodata from their annual review entitled "Eurotrade".

Turnover figures reported are inclusive of VAT. The figures are broken down into food and non-food activities, as well as national and non-national activities. The annual data relate to the financial year of the individual company and not necessarily to a calendar year. The most representative year is used (for example, a financial year running to February 1997 would be recorded as data for 1996).

The reader should be aware that this information is collected largely through the use of company reports. These may well not be comparable to data provided by the national statistical offices that is used for the bulk of the analysis within this publication. Furthermore the data presented relates to enterprise groups and not to the more narrow definition of enterprise units (as used in official sources).

Table 3.1.4

Top 10 in the European retail trade of food, 1997

	Country	Turnover (million ECU)	Food turnover (%)	Non-food turnover (%)	Non-European turnover (million ECU)
Metro	D/CH	50,765	47.7	52.3	2,471
Intermarché	F	30,880	81.5	18.5	0
Rewe	D	29,277	81.0	19.0	0
Promodès	F/CH	28,205	75.3	24.7	528
Auchan	F	25,669	71.8	28.2	492
Tesco	UK	24,848	84.3	15.7	0
Aldi	D	24,587	86.4	13.6	2,903
Edeka	D	22,942	84.6	15.4	0
Leclerc	F/CH	21,395	53.2	46.8	0
Carrefour	F	20,842	59.5	40.5	8,101

Source: M+M Eurodata

Table 3.1.5

Top 5 in the European retail trade of food, breakdown of turnover by sales format, 1997 (million ECU)

	Metro (D)	Intermarché (F)	Rewe (D)	Promodès (F)	Auchan (F)
Hypermarkets	8,525	0	1,451	6,234	13,260
Superstores/supermarkets	3,318	19,217	8,433	7,742	2,208
Discount stores	796	398	5,675	0	0
Department/variety stores	4,848	0	0	0	0
Non-food retail stores	8,839	1,288	1,106	0	0
Wholesale	6,216	0	6,206	1,882	0
Mail order	330	0	0	0	0
Others	724	522	824	2	1,907

Source: M+M Eurodata

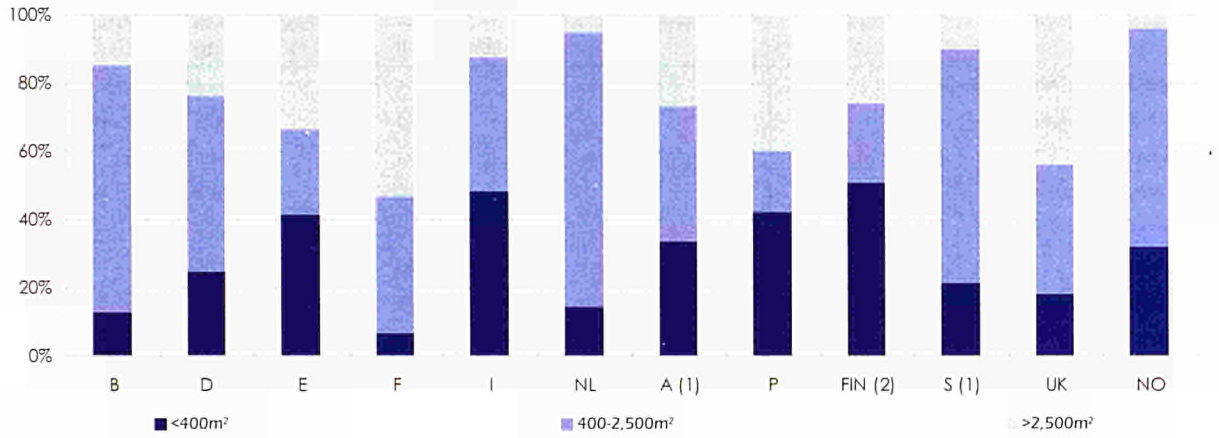
Since the conception of hypermarkets, food retailers in France have diversified into non-food products. This has meant that the retailers in France have had little room to expand into non-food markets as the domestic market reached market saturation. This may explain why French chains have been some of the first (with German players) to expand outside of their national markets, first into neighbouring European markets (such as Italy and Spain) and more recently into eastern Europe, south-east Asia, China and Latin America. There are a number of risks (apart from the large capital injection required) associated with expanding outside of national markets. First of all, the retail format may not meet customers' demands or cultural expectations. Secondly, the business environment may be different and take some time for management to adapt to (labour law, planning permission or trading licenses). These risks have deterred a large number of grocery retailers from expanding beyond their national boundaries. When enterprises have attempted to expand, internationalisation has generally focused on exporting a tried and tested product, brand or image.

Within the hypermarket format, the move towards internationalisation has been led by French enterprises. German discount stores have been the most prominent in trying to export this particular type of sales concept within Europe. The expansion of German discount store enterprises into other European countries sparked a defensive reaction from many national players to compete by launching their own discount chains. However, the concept has generally not taken off to such a degree in other European countries.

Price competition does however exist in other markets and may result in less popular brands being dropped, as retailers attempt to rationalise. Otherwise, retailers are putting additional pressure on distributors, as they seek to improve their own margins. This is particularly true in retail food sales, where a fairly small change in price can have a significant result on sales volumes. One reason for this may be that in food retailing consumers are well informed on prices, as they tend to go shopping on a regular basis, often purchasing the same products.

Figure 3.1.4

Share of turnover in the retail trade of food, broken down by surface area of sales outlet, 1996



(1) 1997.
(2) The figure for sales outlets >2,500 m² includes department stores.

Source: M+M Eurodata

Table 3.1.6

Store surface area within the retail trade of food, 1996

	Superettes <400m²		Supermarkets 400 - 2,500m²		Hypermarkets >2,500 m²	
	No. of outlets (units)	Turnover (million ECU)	No. of outlets (units)	Turnover (million ECU)	No. of outlets (units)	Turnover (million ECU)
B	10,878	1,920	2,013	10,766	81	2,283
DK	:	:	:	:	:	:
D	54,563	24,341	16,329	51,679	1,408	24,266
EL (1)	16,718	:	813	:	22	:
E	75,743	13,550	3,604	8,287	268	11,136
F	30,060	7,052	6,421	44,093	1,056	59,089
IRL	:	:	:	:	:	:
I	110,660	17,075	5,577	14,024	277	4,590
L (2)	38	:	60	:	6	:
NL	3,438	2,613	2,911	14,958	40	964
A (3)	5,271	3,555	1,792	4,178	274	2,830
P	31,200	2,877	768	1,221	30	2,721
FIN (4)	4,341	4,557	281	2,077	192	2,371
S (3)	4,500	3,192	1,980	10,212	76	1,515
UK	35,046	12,715	3,265	26,394	872	30,955
NO	3,402	3,460	1,538	6,963	23	457

(1) 1994.
(2) 1995.
(3) 1997.
(4) The figure for hypermarkets includes department stores.

Source: M+M Eurodata

Table 3.1.7

Top 10 European co-operations in the food trade, 1997

	Head office	Turnover (million ECU)	Food turnover (%)	Non-food turnover (%)
European Marketing Distribution	CH	96,704	74.6	25.4
Associated Marketing Services	CH	70,289	82.5	17.5
Eurogroup	D	42,296	67.3	32.7
NAF International	DK	38,416	81.8	18.2
Promodès World Trade	CH	34,490	75.2	24.8
Agenor	CH	30,880	81.5	18.5
SED (Sainsbury)	UK	25,107	86.0	14.0
Europartners	NL	20,959	85.4	14.6
BIGS Buying International	NL	14,757	83.8	16.2
SCRL Bloc	B	9,622	90.0	10.0

Source: M+M Eurodata

Organic growth gives the enterprise more control over operations, however barriers to entry may force enterprises to look for alternative strategies. One such development has been joint ventures, seen as a compromise between organic growth and internationalisation through mergers and acquisitions. This strategy is of particular use in penetrating markets where access is difficult, either due to market barriers or due to geographical or cultural barriers. The use of joint ventures leads to the local retailer gaining knowledge and information regarding the sales format as well as training in management techniques. On the other hand, the foreign operator is likely to receive information on local consumer and market characteristics and knowledge of the local business environment.

Within the food trade, purchasing and distribution centres would like to enforce pan-European pricing policies that are centrally co-ordinated. At present, the manufacturers of branded goods have been able to delay the implementation of such a policy. Nevertheless, with the introduction of the euro and the continued development of the Single Market, one may expect that large European co-operations (sometimes known as multiples) will be able to engage in single transactions, covering the whole continent. Indeed, many of Europe's largest retail food traders have already set-up purchasing centres to co-ordinate the purchase of leading brands at a European level (often in Switzerland).

There are risks that concentration within the retail food market within Europe will result in a number of large chains eventually dominating the market and reducing the variety of shopping outlets for consumer choice. In turn this may lead to a reduction in the number of products on offer (with stores carrying only the market leader and own label brands). Such a trend would have widespread implications for the wholesale trade activity too, as it would reduce the number of products being distributed and may lead to a situation where retailers have increased bargaining power, as they will be monopoly purchasers.

Table 3.1.8

Top 10 national organisations / co-operation in the food trade, 1997 (1)

	Country	Turnover (million ECU)	Food turnover (%)	Non-food turnover (%)
Markant	D	27,203	74.3	25.7
Cometca	F	24,983	65.2	34.8
Edeka	D	24,775	84.1	15.9
Rewe	D	23,714	79.0	21.0
Casino	F	21,325	79.0	21.0
CAP/CIM	F	19,658	75.0	25.0
NISA Today's	UK	15,475	80.0	20.0
CWS	UK	11,859	90.0	10.0
SPAR	D	10,339	84.3	15.7
CMS	I	9,202	89.0	11.0

(1) National turnover.

Source: M+M Eurodata

As we have already noted, one response of small and medium-sized enterprises has been to set up associations amongst themselves. These networks can be used to replenish stocks more quickly, using real time stock handling procedures. Production capabilities can be matched to consumer demand, this concept is termed Efficient Consumer Response (ECR). As such, organised groups of small traders can offer specialist services that are customer-orientated. These services can be more flexible than those offered by larger enterprises, whilst benefiting from a support infrastructure that co-ordinates purchasing, marketing, logistics and stock handling.

Market trends in other distributive trades' activities

The non-food retail trade market has traditionally been dominated by a mixture of specialist shops and department stores. This sales format has however come under increasing pressure in recent years from large stores that specialise in a single product, for example, specialist stores for items such as consumer electronics, toys, do-it-yourself, sports and media products (books, magazines, CDs, videos). At the same time, manufacturers of leading brands within the leisure and sports sectors have started to integrate downstream towards the retail sector. A similar trend can be seen with top designers in the fashion industry, who have in recent years started to develop brand concepts.

One means for enterprises to ensure that they remain competitive is to develop product differentiation. Many consumers express a desire to be different and are willing to pay a premium to obtain the latest design or brand. Indeed, the fashion, leisure and sports markets start to display convergence in their market trends across Europe. Nevertheless, such pan-European trends for a few key retailing chains are usually reinforced by the development of a second tier of national suppliers of specialist products to meet local needs.

Whilst traditional retail formats have expanded to single concept multi-stores, there have been a number of alternative sales techniques developed. Amongst them, we may include mail order, telesales, door-step sales, home delivery services, local convenience stores open 24 hours a day and mini-markets within petrol stations. Finally, the rapid expansion in sales via e-commerce is a phenomenon that we can expect to develop at a rapid pace. At present e-commerce is particularly prevalent in a number of specialist areas, such as the sale of books and CD's.

Many of these new formats of retail activity have led to an expansion of labour markets, as they are largely labour-intensive activities. These activities involve intangible elements such as customer satisfaction, which may considerably affect market share. One example of this phenomenon is customer advice, whereby stores are placing staff members on the shop-floor to give practical assistance to their customers (for example, do-it-yourself outlets). Another example of increasing the service component within retailing is the trend to provide customers with help with packaging their goods. These trends have come under increasing examination as they provide one means of helping to solve the unemployment problem within Europe, they are treated in the next section of this publication that covers the labour market within distributive trade.

A final area where demand is expected to grow in retail trade in the next few years is with respect to other services (for example, tourism), where synergies may exist for commercial traders. Tourism can create new demand for products as diverse as regional food specialities, designer clothing or local craft goods.

There have been marked developments in the wholesale trade market away from enterprises that simply deal in merchandise towards other activities that are not strictly wholesale in nature. Indeed, as we have seen an increase in the service component of many retailers there has been a corresponding increase in the service provision provided by wholesalers, such as technical, financial and logistical advice. As such, wholesale traders have started to compete for additional service markets (such as finance, transport and consultancy, as well as retail trade) where previously they did not play a role.

The trend towards growing concentration observed within the retail trade sector of the economy has also developed within wholesale trade, with many large trading companies developing. These enterprises may be seen as a reaction to increased market power in two areas, multi-national producers and large retail chains.

Wholesale trade activity may be studied from a number of different perspectives. The NACE Rev. 1 economic classification of activities allows us to distinguish commission trade (NACE Rev. 1 51.1) from non-commission trades (NACE Rev. 1 51.2 to 51.7). Another classification that may be employed is to look at wholesale trade in relation to consumption and production-orientated markets. Wholesale traders operating within production-orientated markets need to be aware of the potential threat from vertical integration by manufacturers moving into the areas of procurement and distribution. Nevertheless, it has been more commonplace in recent years to see manufacturers outsourcing non-core functions such as logistics, transport and stock handling to more specialist enterprises.

Wholesale traders operating in consumption-orientated industries have faced somewhat different challenges, with integration leading to increased concentration. Retailers, anxious to achieve economies of cost, have moved upstream into purchasing and distribution (for example, large supermarket groups).

Franchising

In the face of competition from large enterprises, smaller retail and wholesale traders have been forced to develop trading networks, co-operatives and other forms of alliance. One of the most successful formulas that has been developed in recent years is the concept of franchising. Franchising is based on the marketing of a concept, a product or a brand name. It is particularly successful as a business solution to developing international markets, allowing brand images to be established across the largest cities of the world.

Looking at turnover generated by franchising across Europe, we see a noticeably higher level of turnover in France (almost 30 billion ECU) compared to other European countries (although the French figures reported are for the end of 1998, not the end of 1996). By far the highest average turnover per franchisee was recorded in France, at more than a million ECU of turnover per franchisee.

Despite the fact that the number of franchisees in the United Kingdom was almost the highest in Europe, they generated a comparatively low level of turnover (only 9.8 billion ECU, in 1997). Indeed, the average turnover per franchisee was lowest in the United Kingdom (at 364 thousand ECU per franchisee). All other countries recorded average turnover per franchisee between 500 and 700 thousand ECU, except the Netherlands (above at 777 thousand) and Denmark (below at 440 thousand).

Franchising plays a particularly important role in the labour market of several smaller countries. We may note that the share of the total number of persons employed in franchising in countries such as Hungary, the Netherlands, Portugal and Sweden is well above the European average. For example, the number of persons employed in Hungary and Italy was similar (45.0 thousand compared to 49.7 thousand persons).

Franchising allows the franchiser the ability to control the distribution of products, logistics and high-street image, whilst at the same time off-loading some risks of starting new retail outlets. The franchiser grants the franchisee the right to use brand names, trademarks and signs, whilst supporting the franchisee in starting up the business, especially through training. Equally, the franchiser invests financial and human assets to promote the brand and trademark. The franchiser maintains the control on the geographical distribution of stores and the products that are carried within each store.

The franchisee may benefit through being provided with a predefined brand image. This can significantly reduce development costs and lead-in times for start-up. At termination of the agreement, the franchisee loses the right to use any brand names and trademarks.

One of the major obstacles that blocks further rapid expansion of the franchising formula (and other new ventures in distributive trades) in Europe is access to venture capital. Indeed, the lack of access to venture capital is a general problem that is fundamental for the competitiveness of all European business.

Table 3.1.9

Main indicators for franchising in Europe, 1996

	B	DK	D	E	F (1)	I	NL	A	P	S	UK (2)
Number of franchisors (units)	170	98	530	288	530	436	345	210	220	230	541
Number of franchisees (thousands)	3.5	2.5	22.0	13.2	29.7	21.4	11.9	3.0	2.0	9.2	26.8
Turnover (billion ECU)	2.4	1.0	14.7	6.8	29.9	12.1	9.3	1.6	1.0	5.8	9.8
Number of persons employed (thousands)	28.5	40.0	230.0	69.0	350.0	49.7	100.0	40.0	35.0	71.0	264.1

(1) 1998.
(2) 1997.

Source: French Franchising Federation

E-commerce

Much has been written on the future of electronic commerce and the possibilities that exist for new markets to be developed. It is clear that the area of distributive trades dominates the potential use of electronic commerce (e-commerce), whilst by no means resting the sole area that is open to expansion on the Internet. E-commerce may however be expected to continue its spectacular rise seen over the last three or four years. Whilst there will be many companies reporting high profits as they enter new markets, the market remains under-developed and volatile. Indeed, enterprises face high risks as the market is constantly changing and developing.

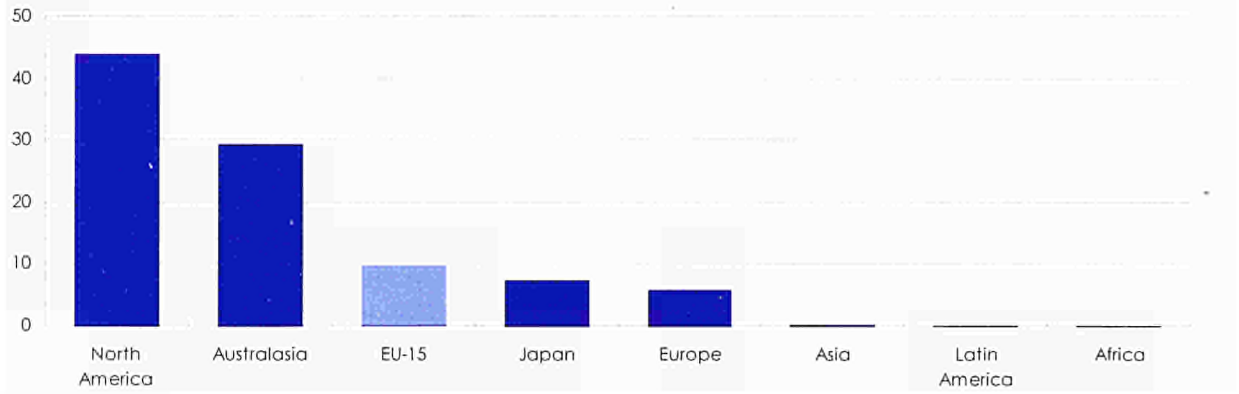
From the perspective of the enterprise, there should be many opportunities through e-commerce to reduce costs as items can be ordered on a just-in-time basis. Through the computerisation of a client base there is also potential for retailers to study market trends and target particular customers far more closely. Information available in electronic format can be used to encourage the seamless flow of information between businesses and consumers, as well as between businesses.

Another area where e-commerce may allow a pooling of resources is with respect to small and medium-sized enterprises. Purchasing power, access to market information, logistics and co-operative R&D can all be organised in response to the growing concentration of large players. Activities such as intermediaries, on-line business and logistical services may offer new market opportunities to European entrepreneurs. Information technology in general can be used to reduce distribution costs to a minimum. One example is the sale and update of computer software that is often made directly over the Internet nowadays. Indeed, the wholesale sector faces strong competition from the Internet as an alternative form of distribution for some goods and services.

The start-up costs associated with e-business are comparatively low when compared to manufacturing activities and most other service activities. There is often no need to acquire business premises and there are very low costs associated with investment in machinery, research or marketing. This is all the more important given that access to venture capital is often limited for smaller enterprises, with banks often unwilling to lend as entrepreneurs cannot offer security.

Figure 3.1.5

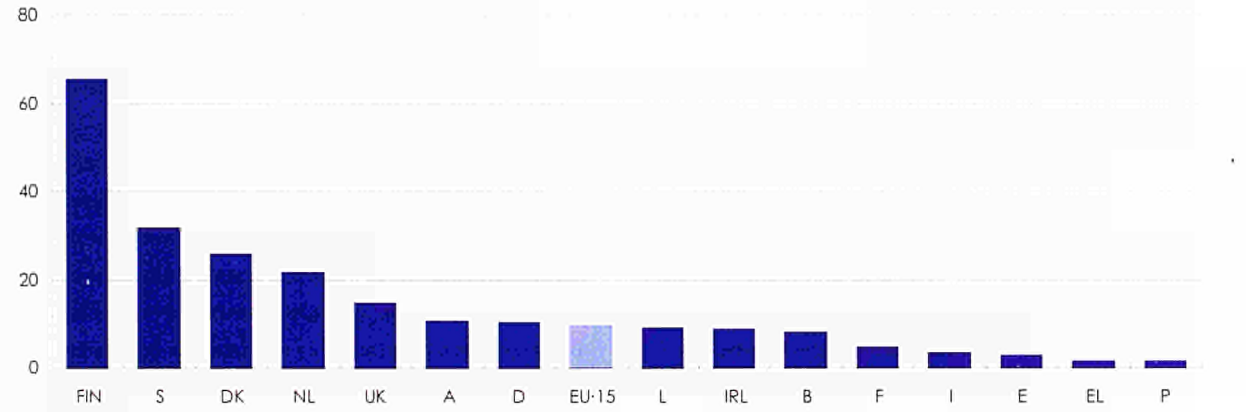
Number of internet hosts per 1,000 inhabitants, 1997 (units)



Source: DG XIII

Figure 3.1.6

Number of internet hosts in the EU per 1,000 inhabitants, 1997 (units)



Source: DG XIII

The rapid expansion of the Internet has been particularly pronounced within North America. Europe as a continent follows Australasia in third place when measuring Internet penetration by the number of Internet hosts per 1,000 inhabitants. The penetration of the Internet in the USA is four times that seen for the EU, where there are on average 10 Internet hosts per 1,000 inhabitants. The relatively low level of take-up within Europe can be seen looking at Figures 3.1.5 and 3.1.6. Japan also has a comparatively low rate of only 7.6 Internet hosts per 1,000 inhabitants. If e-commerce develops according to most market predictions then a fundamental for competitiveness will be a highly developed telecommunications infrastructure with low costs.

Of the EU-15 Member States, Finland (with almost 66 Internet hosts per 1,000 inhabitants) has an even higher rate than the USA. Sweden also displays a very high rate, approaching the same number of Internet hosts as both Canada and the USA. Nevertheless, just over half of the Member States have less than 10 Internet hosts per 1,000 inhabitants, the lowest figures being recorded in Greece and Portugal (with 1.9 and 1.8 Internet hosts per 1,000 inhabitants).

The main risks associated with the expansion of e-commerce are found in high telecommunications costs for providers and consumers, uncertainty as regards legal regulation and security aspects for payment on-line. Nevertheless, the speed that certain e-commerce activities are growing at would tend to suggest that rapid growth is assured for many markets. It does however remain to be seen whether e-commerce that has developed largely on the basis of a business to consumer relationship can be expanded to include business and administrative clients. Most market transactions are presently found in areas such as the sale of books or CDs, they may be classified as business to consumer (B2C) transactions. One area that is forecast to grow rapidly in the future is business to administration (B2A) relationships, based on the premise that many public authorities will move towards electronic tendering systems.

Whilst it is fundamental to have a telecommunications infrastructure that can cope with the expansion of electronic traffic, such an infrastructure will be of little use if cultural and business opinion is not in favour of commerce developing across the Internet. DG XIII conducted a survey[1] in 1997 on the attitudes of business towards electronic commerce, some of the most interesting results are presented in Table 3.1.10. Most European businesses were keen to accept that the Internet was a useful tool for the transfer of information (in other words e-mail and simple WWW pages).

However, when business was questioned about whether or not the Internet was suitable for making transactions there was far less agreement. Indeed, less than half of the respondents in Germany, Italy and the Netherlands agreed that the Internet presented a suitable means for conducting business (B2B, business to business relationships). In Finland and the United Kingdom (two of the most developed countries in terms of Internet infrastructure) there were far higher positive response rates to the question (over 70%). This may point to a trend that as the Internet becomes more established within a country, there is increased acceptance of using it as a tool to conduct business to business transactions.

E-commerce is unlikely to fully replace more traditional forms of retail outlet. However, as access to retail outlets becomes increasingly difficult for some disadvantaged members of society (for example, the physically unfit or those in remote areas with no means of transportation), e-commerce may well offer one possibility to continue shopping. Nevertheless, many consumers enjoy shopping as a leisure activity, be it in a large out-of-town shopping centre or a small village shop and they are unlikely to change these habits for ordering all their purchases over the Internet.

One area that may see negative employment trends as a result of increasing importance for e-commerce is that of basic information services. Services such as travel agents, stockbrokers, pension fund managers, insurance agents, or estate agents are basically intermediaries acting as information nodes. They provide information as a service to customers for a price and their activity would appear to be the most vulnerable (for example, the dissemination of standard information on the price and times of travel). However, the threat of job losses through e-commerce taking a significant share of these markets may be less than imagined. Most of these services have already seen reductions in labour forces as, for example, traditional stockbrokers or insurance agents have been subject to competition from direct sales or telesales. Whilst e-commerce may lead to the loss of some services employment, there are other areas where an expansion in the number of persons employed can be expected (namely computer related activities and telecommunications).

Table 3.1.10
Potential use of the Internet (%)

	D	F	I	NL	FIN	UK
Do you consider the Internet of use for information exchange...						
Not suitable	16.3	0.0	4.0	7.1	0.0	0.0
Suitable	53.1	21.3	34.0	23.2	53.2	36.0
Very suitable	30.6	78.7	62.0	69.6	46.8	64.0
Do you consider the Internet of use for electronic transactions...						
Not suitable	59.6	42.3	53.1	58.2	29.3	24.5
Suitable	25.5	36.5	40.8	23.6	56.1	55.1
Very suitable	14.9	21.2	6.1	18.2	14.6	20.4

Source: DG XIII

White Paper on Commerce

At the start of 1999 the Commission published a White Paper on Commerce[2]. The aim of the White Paper was to draw attention to the important role that commerce plays in the day-to-day life of the European Union. The aim of the document was not only to raise awareness of the activity, but also to enhance its competitiveness, whilst "maintaining its major contribution to employment and social cohesion".

The White Paper outlines four main goals:

- improving the use of policy instruments to assist commerce;
- improving the administrative, legislative and financial environment;
- strengthening competitiveness and promoting entrepreneurship;
- and encouraging Europeanisation and internationalisation.

Commerce 2000 is a Community initiative designed to aid economic development and job creation in less favoured areas. The policy is to be incorporated into the planning of the Structural Funds and aims to identify best practices within commerce and disseminate these practices at decision-making levels within less favoured areas. The main objective of Commerce 2000 is to help realise the potential that distributive trades offer for economic development and job creation in rural and less favoured areas. This initiative has led to areas being selected and incorporated within the framework of the Structural Funds programmes for assistance. The area of assistance has been further extended to include CECs participating within the multi-annual programme for SMEs.

As well as Community-wide legislation that has an effect on distributive trades, there are many national and local regulations that also need to be adhered to. Some of the EU countries have traditionally displayed a reluctance to encourage large-scale retail formats. This is particularly the case in countries where small, independent or family-run businesses account for a significant share of the market. The main concerns have focused on the relocation of retail outlets away from city centres; the disappearance of traditional medium-sized retail enterprises and the cultural changes enforced by the standardisation of product lines. In reaction to these trends there have been a number of laws passed within most European countries, for example, in France there are now tight restrictions on opening new retail surfaces in excess of 300m², with large retail outlets being taxed at a higher rate than smaller enterprises. Changes such as these have led to the situation where the only means of expansion for large retailers is to move into new sales formats such as supermarkets and convenience stores. These formats are less restricted by planning or opening hour legislation and have recorded an increased share in the market in recent years.

(1) "Evolution of the Internet and WWW in Europe", October 1997, DG XIII.

(2) COM (99) 6 final, ISSN 0254-1475.

The euro

Cross-border trade has gathered momentum in recent years. With the advent of the Single Market and the introduction of the euro we can expect these trends to continue and develop. Indeed, the introduction of a single currency should allow price comparisons to be made across Europe. However, the day when prices are stable and aligned across the whole of Europe may still be some way off.

Other observers believe that the introduction of a single currency across Europe may slow down consumption for some period of time because consumers will be uncertain as to the price of goods and will therefore limit themselves only to the purchase of necessary goods. The role of traders will therefore be essential to the launch of the euro when coins and notes go into circulation using the fixed rates as displayed in Table 3.1.11.

On 30th June 1998 there was an agreement on a code of conduct between the representatives of commerce, tourism, craft sectors and consumers, whereby business representatives accepted to provide minimum levels of information, whilst ensuring benefits to both parties involved in a transaction. The White Paper on Commerce details a study made by the Commission relating to the costs of the introduction of the euro, including the issue of dual display of prices and re-affirmation of the principle of continuity of contracts and a general rounding rule.

Whilst there has been no specific implementation or compulsory Regulation with respect to this issue, the Commission has released a Recommendation concerning dual display of prices and other monetary amounts. The main issues facing commerce include:

- educating the consumer;
- the cost of two currencies circulating for a six-month period in the first half of 2002;
- investment in information technology in order to be able to deal with the introduction of a new currency;
- and the cost of training staff.

Particular attention will have to be paid to disadvantaged members of society, such as the blind and the elderly who may face an additional burden in making conversions.

The implications of the euro are numerous for the retailing sector and may prove to be costly. Only two years after facing the Y2K problem (year 2000 computer problem) enterprises will be asked to switch currency. Many companies and banks have already switched to a dual pricing strategy in an attempt to move to the euro as effortlessly as possible in 2002.

Table 3.1.11

Fixed exchange rates for the euro ——————(1 euro = ...)

B (BEF)	40.3399
D (DEM)	1.95583
E (ESP)	166.386
F (FRF)	6.55957
IRL (IEP)	0.787564
I (ITL)	1,936.27
L (LUF)	40.3399
NL (NLG)	2.20371
A (ATS)	13.7603
P (PTE)	200.482
FIN (FIM)	5.94573

Source: Eurostat

The Single Market

There has been a trend towards internationalisation within the distributive trades' sector of the economy. Wholesalers are generally less tied to regional customer preferences than their retail partners. Indeed, the internationalisation of the wholesale market has led to the possibility of small producers having access to a wide range of European markets. The creation of a single European market has led to many goods and services being traded freely across the 15 Member States, without legal, physical or administrative impediment. With the advent of the Single Market, transport costs across frontiers have been reduced significantly. Efficient and reasonably priced transport is vitally important to the present and future success of commerce. Transport policy within the EU shapes to some degree the extent of the growth of commerce into the 21st century, with the Trans-European Networks (TENs) providing transport corridors from one end of Europe to the other.

The Commission aims to encourage competition within commerce, such that business is not faced with numerous regulations that prevent and restrict entry into local markets. European wide regulations are not always the solution and the principle of subsidiarity has been applied in the form of national rules to the creation of an enterprise, taxation law, rental of commercial premises and unfair practices. Other areas such as opening hours have also been deemed by the Court of Justice to be under the competence of the Member States, whilst consumer protection falls under the competence of both EU directives and national regulations.

From the international perspective, the Commission is playing an active role is in trying to ensure that international trade is also carried out with fair competition. This may be achieved in the next round of discussions on trade negotiations GATS (General Agreement on Trade in Services) due in the year 2000. Another area relating to international trade is the enlargement of the EU to include Central European Countries (CECs). The inclusion of these countries within the EU will create a larger and more harmonised Single Market, which should permit even greater market cohesion.

In conclusion we may summarise the above findings by stating that the market for commerce is becoming increasingly concentrated. On the other side of the equation the consumer has an increasing amount of disposable income and (presently) a wide choice of products and sales formats to suit their lifestyle. As technology spreads into all areas of commerce we can expect further rationalisation and changes in the structure, conduct and performance of distributive trades.

Labour force trends in distributive trades

This section reviews two main sources of information, the Labour Force Survey and the Structure of Earnings Survey (a one-off data collection from 1995). Distributive trades are an important employer within the EU economy, employing more than 22 million persons. The activity offers a varied number of jobs often to persons with little experience or low levels of skill. In addition, the flexible labour market of this particular activity allows people to re-enter the labour force or work a short number of hours to fit their particular lifestyle. Retail trade, in particular, offers many women the possibility to combine family commitments with a working life.

Technological innovations and increased competition have changed the working conditions of persons employed within distributive trades. Opening hours have generally been extended throughout Europe, automation has increased in both wholesale and retail activities, whilst consumers are demanding a larger range of products. The tendency within distributive trades towards increased concentration has somewhat reduced the role of small entrepreneurs and persons employed without a contract or a fixed wage or salary. There has at the same time been an increase in the number of persons working part-time, to meet the demand for increased staffing levels during peak hours, whilst at the same time minimising labour costs for employers.

Triad comparison of main labour force trends

In all three Triad economies distributive trades are an important employer and responsible for a growing supply of jobs. In the EU the activity accounted for over 15% of total employment in 1997. There was a varied picture within the labour market within the Member States. For example in France, Germany or the Nordic countries, labour policy was more protective, whilst in the Netherlands, the United Kingdom and in Ireland, a number of measures were taken to increase the flexibility of labour market. Between 1995 and 1998 employment decreased slightly in Germany (down by 0.9%) and increased only moderately in the United Kingdom and France (up by 0.9% and 1.2% respectively). However, in Spain and the Netherlands there were increases of 10.0% and 6.5%.

If we look at the other two Triad economies, distributive trades in Japan recorded a somewhat higher share of the labour force (some 17.6%), whilst in the USA there were 23.6 million persons, or 18.5% of total working population (both shares for 1997).

In the USA, employment was increasing rapidly in the nineties, based on a growing economy throughout the period. Distributive trades in the USA reacted at a fast pace to changes in consumer demand and general economic conditions. The American labour market was more flexible and showed far greater cyclical variations in both the creation and laying-off of staff.

Besides the economic situation, the legal framework of the labour market in the USA supported the creation of new jobs. The system of social security was less stringent than that in the EU, with indirect labour costs in the USA often below those in Europe. In addition, labour laws in most European countries have traditionally been designed to maintain existing jobs, rather than motivate the creation of new jobs. In the USA employers often did not have to follow stringent hiring and firing regulations, whilst in Germany for example, employers had to indicate the loss of a job six months in advance. Although the European regulations meant a higher level of protection for employees, the lower level of labour market flexibility compared to the USA had implications for the speed with which employers would react to improving economic conditions by hiring new labour.

In the USA growing sales led to tight labour markets. Indeed, some American employers even reported having problems to find staff. In the USA (as in the other two Triad economies) the size of the labour force was growing mainly due to an increase in the rate of female participation, with far more women returning to the labour force after having children than in the past[1].

In Japan, the number of persons employed was almost unchanged between 1990 and 1997 due to the weak economic situation. In the latter part of the eighties, employment within distributive trades had been on an upward trend (rising by 9.2% between 1985 and 1990). The trend of concentration intensified in the nineties, particularly as a result of deregulation in 1997. Nevertheless, compared to the other Triad economies, Japanese distributive trade was still dominated by small-sized enterprises. Restructuring of the activity in Japan led to a reduced number of self-employed persons and unpaid family workers. The Japanese recession changed radically the structure of the labour market (where employees quite often started and ended their working life with the same company). Conditions of employment were fundamentally changed. In retail trade, for example, it had been very difficult to set-up a large retail outlet until 1997, because former laws foresaw the agreement of potential competitors. After deregulation, foreign retailers and numerous discount stores entered the market. Furthermore, longer opening hours, especially of convenience stores, gained importance. In order to decrease labour costs many enterprises employed more part-time workers, particularly women. In Japan there were in addition various disincentives for married women to work full-time, such as high tax rates and family allowances paid by companies only up to a certain level of family income. The number of women working full-time fell during the nineties (by 2.8 percentage points between 1988 and 1998 to 24.8%).

In the EU there were more than 10 million women working in distributive trades, which made up just under 50% of total number of persons employed in the activity. As in the USA, a growing proportion of these women were working part-time, with the share of females in the total number of persons in part-time work often rising above 75%. In Japan, the number of part-timers and temporary workers grew for the fourth consecutive year in 1998, indicating that this long-term trend was likely to continue[2].

(1) "The American Workplace 1998", Employment Policy Foundation.

(2) "Japan Labor Bulletin", issued by The Japan Institute of Labour.

Structure of the labour force

The structure of the labour force engaged in distributive trades has changed over recent years. The organisation of the activity has changed to one where there is greater importance for larger enterprises, resulting in a higher share of the labour force became waged, whilst there were less working proprietors and unpaid family workers. Secondly, there was an increase in levels of automation (for example, the use of bar codes in stock keeping and at checkouts) which in turn reduced labour costs. The introduction of automation and new technologies was in part responsible for the rising share of part-time staff.

The shares of female and part-time work were interdependent, with women more prepared to work part-time (often due to family commitments rather than economic reasons). In the EU, there were between 3.1% (Greece) and 38.4% (the Netherlands) of the labour force working part-time in distributive trades in 1997. Between 1993 and 1997 the shares of part-time work increased in the EU at a very fast pace. Even in the countries with a longer tradition of part-time work was there continued growth. For example, in the United Kingdom or Denmark, part-time work reached 37.9% and 26.1% respectively of the labour force in 1997.

The share of women in the distributive trades' labour force was higher than in the rest of the economy. EU shares generally ranged between 40% and 50% of the total number of persons employed. Retail trade was the main activity that recruited women. Indeed, only Italy and Greece reported that men were in the majority in the retail trade labour force. In 1998 women made up 69.2% and 67.1% of the retail trade labour force in Austria and Germany. Traditionally, lower female participation rates have been found in the motor trade, where European figures were around 15%. They were somewhat higher in Germany (22.2%) and lowest in Spain (10.2%).

The high share of women in the distributive trades' labour force was fundamental as a point of entry or re-entry to the labour market. Distributive trades also required a high degree of flexibility provided by part-time work, especially during peak hours. Women often do not want to work full-time, for example due to family commitments. In 1998 the share of women in the total number of part-time persons employed exceeded the threshold of 60% in all European Member States. There were shares as high as 91.3% in Austria, falling to 61.4% of the part-time labour force in Denmark. However, in several Member States the share of female part-time employment decreased. This was the case between 1992 and 1998 in the United Kingdom, where the female share in total part-time work in distributive trades fell by 4.5 percentage points to 77.4%. The increase in male part-time work may well be due to economic reasons, whereby men are unable to find alternative full-time employment and accept a part-time post in the interim period.

Many of the new jobs that were created were found to be part-time posts, with women occupying a large number of these positions. Throughout Europe the share of full-time work in distributive trades was reduced during the course of the nineties, except in Sweden, where an increase from 70.8% in 1995 to 73.2% in 1998 was recorded.

In the majority of the Member States the number of persons who were working part-time because they wished to do so was increasing: for example, in Germany and France, 20.1% and 10.5% of the labour force chose to work part-time in 1998.

Nevertheless, the share of involuntary part-time workers also rose, reaching 3.9% of the total labour force in 1998 in Germany, more than double the figure of 1993. In Portugal the increase in involuntary part-time work was even more rapid, rising to 3.0% of the distributive trades' labour force in 1998. Even higher rates were recorded in a number of other countries, although the rate of change was much slower: Sweden, Finland, France and Belgium all reported involuntary part-time work accounting for at least 5.5% of the total labour force.

Figure 3.2.1

Share of motor trade labour force in the EU by age group, 1997 (1) (%)

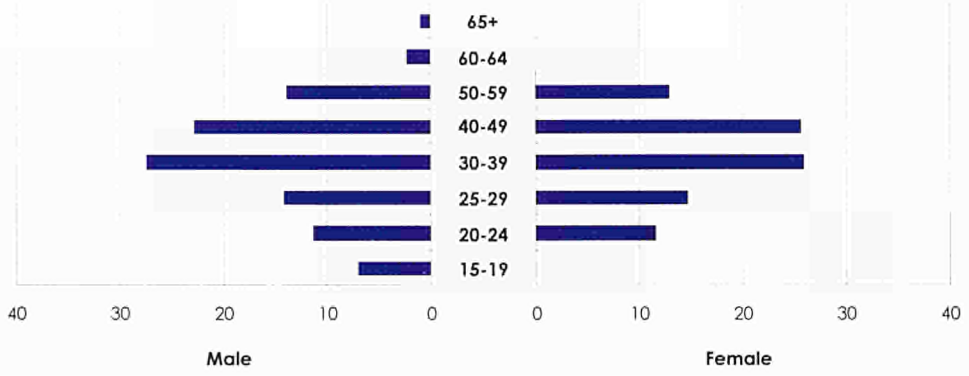


Figure 3.2.2

Share of wholesale trade labour force in the EU by age group, 1997 (1) (%)

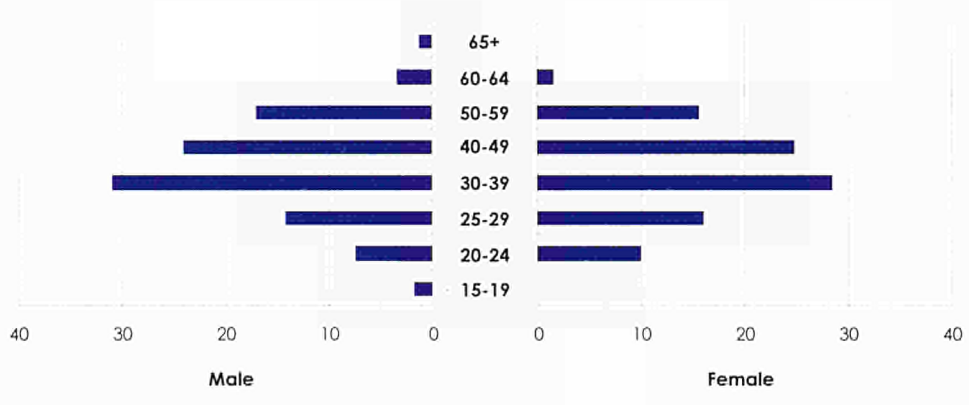
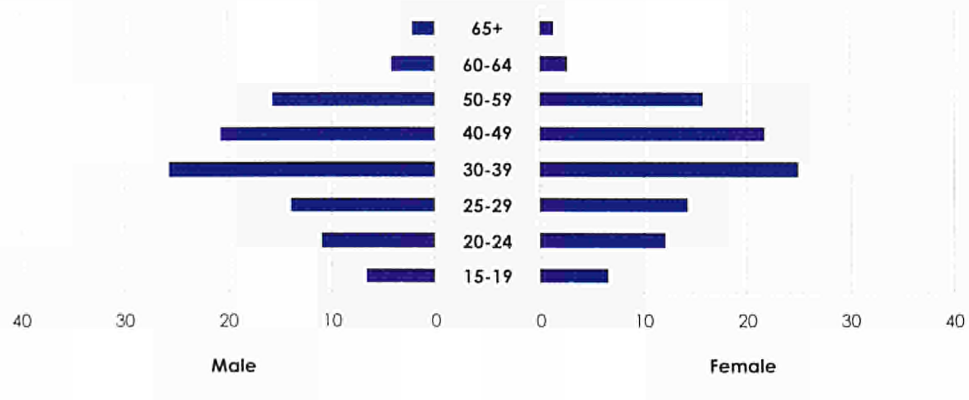


Figure 3.2.3

Share of retail trade labour force in the EU by age group, 1997 (%)

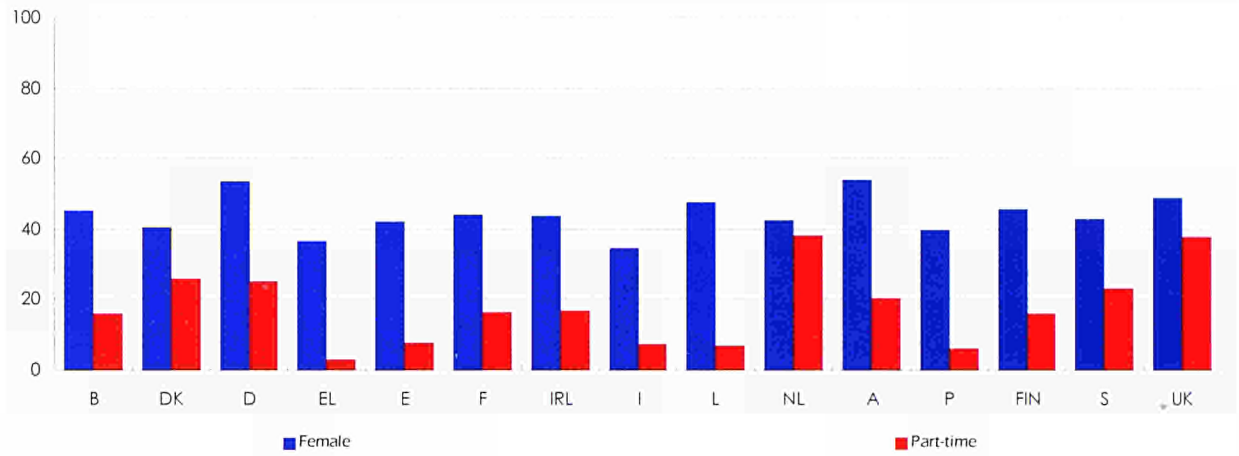


(1) Missing series are not available.

Source: LFS

Figure 3.2.4

Characteristics of the distributive trades' labour force, 1997 (% of total)



Source: LFS

Figure 3.2.5

Women employed in distributive trades by activity, 1997

Source: LFS

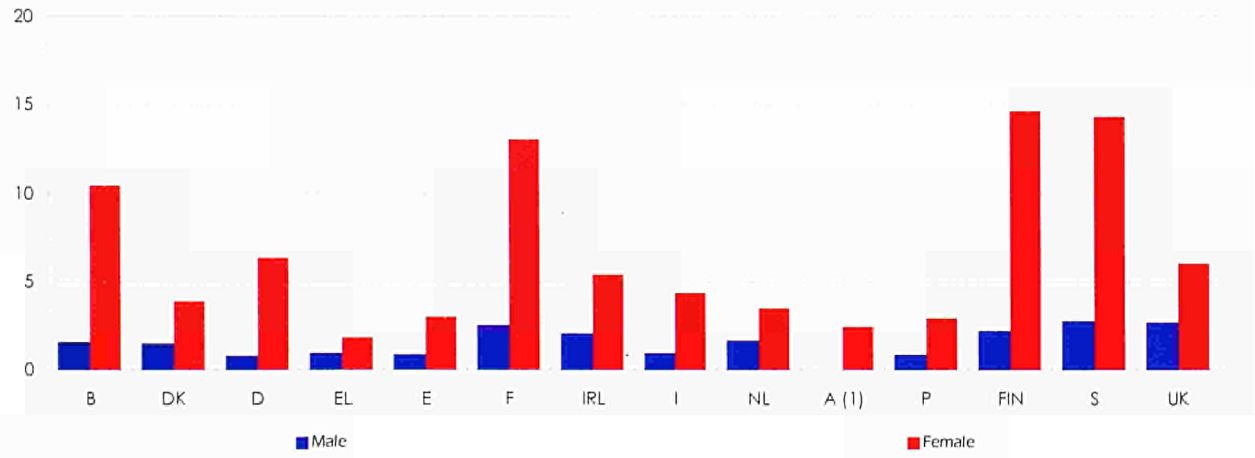
These figures underlined the fact that an increasing number of part-time workers signed working contracts for economic reasons. Besides women, students and multiple job-holders took advantage of the increase in part-time work. Although many of them considered these jobs as interim posts, which created a higher level of job rotation, employers appreciated the flexibility offered by part-time work.

If we look at the structure of female employment there was a different picture in the southern Member States. Whilst in Greece only 7.2% of all females in distributive trades worked part-time, the rates in the Netherlands and the United Kingdom rose as high as 66.6% and 59.1%. In 1998 the largest share of females working part-time within the southern Member States was only 16.2% in Italy, less than half the figure for the lowest remaining Member State (33.7% in France).

Although distributive trades have traditionally been dominated by small and medium-sized enterprises, there has been an increasing share in the number of employees compared to the total number of persons employed. This ratio grew to over 87% in Denmark and the United Kingdom for retail trade and to over 90% in wholesale trade for France, Luxembourg, the Netherlands and the United Kingdom in 1997. In western and northern Europe the growth in the size of average outlets may explain most of these trends. The share of persons with no contract or fixed wage or salary (largely family workers) in retail trade was below 1% in Germany and the United Kingdom in 1997. During the course of the nineties family workers were replaced by employees throughout the EU, except in Austria, where retail and wholesale trade both reported a slight increase in the share of family workers.

Figure 3.2.6

Share of distributive trades' labour force taking a part-time job for economic reasons, 1997 (%)



(1) Austrian data for men is not available.

Source: LFS

If we look at the share of self-employed persons in the labour force the difference between the southern Member States and the rest of Europe was even more evident. In wholesale trade, some 23.6% of the Italian labour force were self-employed (with no employees working for them), whilst in Germany the corresponding share was just 6.5% (highest and lowest in the EU).

Youth employment also varied considerably across the Member States within distributive trades. Belgium and Italy reported young working staff (15 to 19 years old) accounting for only 1.2% and 1.9% of the total number of persons employed in 1997. In Denmark and the Netherlands youth employment was of growing importance, especially in the activity of retail trade, where young staff often worked at weekends and during the evenings. As youth employment was often only for a few hours a week, employers usually faced lower indirect labour costs than for their regular staff. In 1997 the share of those between 15 and 19 years old in the total number of persons employed in retail trade was 28.4% in Denmark and 16.9% in the Netherlands. With opening hours expanding, it can be expected that retail trade will continue to employ more young workers. In the United Kingdom, 15.7% of those employed in retail trade were between 15 and 19 years old in 1997, whereas in wholesale trade the corresponding figure was only 3.9%.

Hours worked and working times

The changes in the business structure of distributive trades have had consequences for the organisation of working time. Personnel management in wholesale and retail trade has to increasingly take into account the fluctuations of turnover and customer frequency during the day, the week and even the year, with strong temporal and seasonal trends evident.

To meet the requirements of personnel planning there were several developments in the types of working contract offered to staff, depending on the legal framework in the individual Member States. Traditionally distributive trades have used instruments such as contracts with a varying number of weekly working hours, especially for part-time workers. Otherwise, temporary working contracts and the employment of agency workers have been other means of meeting increased demand for staff. Contracts with agreed minimum working hours over a certain period (a year or a season) were much less used. The latter instrument includes an account for working time, where overtime and shorter working days are balanced with the total working time over the agreed period. These contracts provide increased flexibility to the employer and increased job security for employees. For example, traditional forms of seasonal work can be transferred into annual working time models.

With the changing models of working time and the extension of opening hours, additional shifts have been added to the working day. This trend has been reflected in the increasing share of part-time contracts (i.e. those not working a maximum number of hours per day or a full number of days per week). The share of distributive trades' contracts of 40 hours per week was falling in Ireland, Denmark, Belgium and France (to just 31.2% of the distributive trades' labour force in 1998 in the latter).

Table 3.2.1

Mean weekly hours in distributive trades, 1995 (units)

	Motor trade				Wholesale trade				Retail trade			
	Female		Male		Female		Male		Female		Male	
	Full-time	Part-time	Full-time	Part-time	Full-time	Part-time	Full-time	Part-time	Full-time	Part-time	Full-time	Part-time
B	38.2	21.8	38.2	20.1	38.2	23.9	38.3	21.6	37.5	22.8	37.2	16.4
DK	36.7	15.4	38.2	14.1	37.1	16.6	38.4	14.8	36.3	16.1	37.6	12'6
D	37.4	22.1	38.1	25.0	38.5	23.9	40.3	23.1	37.5	24.2	38.5	23.9
EL	39.6	20.1	40.4	:	39.7	19.2	40.4	20.8	40.0	23.8	40.1	23.1
E	40.0	18.6	40.1	21.9	39.7	25.4	40.0	23.0	39.7	23.2	40.0	20.8
F (1)	38.8	18.0	39.0	17.6	38.3	17.0	38.6	15.0	37.3	20.3	37.9	18.1
I	40.8	25.1	41.1	:	40.4	21.8	41.3	20.3	39.9	23.7	41.0	23.7
L	41.7	23.1	40.8	:	40.3	20.4	40.8	16.0	40.2	25.2	40.4	14.0
NL	38.8	21.2	39.4	22.5	39.0	24.4	40.0	25.5	38.3	20.7	39.7	18.8
P	39.8	16.1	42.1	41.7	39.8	22.9	40.4	34.1	41.1	26.3	41.4	22.3
FIN	38.0	17.0	39.2	16.2	37.9	18.7	38.3	16.4	36.1	17.8	37.4	14.9
S	40.6	24.3	40.5	22.5	39.6	28.8	40.1	19.0	39.8	23.1	40.1	14.8
UK	38.8	19.7	40.4	18.6	37.6	19.9	39.3	18.3	37.9	17.0	38.9	15.8

(1) 1994.

Source: SES

Table 3.2.2

Number of persons employed in the EU, breakdown by hours usually worked per week, 1997 (units)

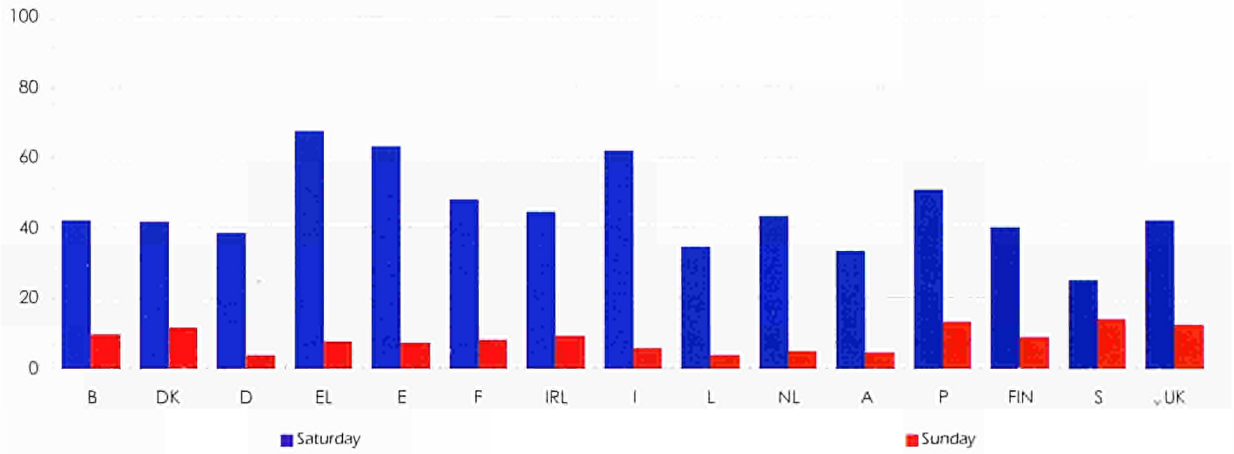
	From 10 to 20 (1)	From 20 to 30 (2)	From 30 to 40	More than 40
Motor trade				
Male	28,530	39,515	643,823	1,897,238
Female	50,926	:	174,368	235,673
Wholesale trade				
Male	:	55,776	888,068	2,509,036
Female	99,604	202,487	601,693	663,880
Retail trade				
Male	197,427	177,406	1,127,059	4,052,915
Female	984,058	1,407,199	2,127,928	2,925,067

(1) 1996 for retail trade for men.
(2) 1996 for motor trade and wholesale trade for men.

Source: LFS

Figure 3.2.7

Share of distributive trades' labour force usually working at weekends, 1997 (%)



Source: LFS

Women signed part-time contracts more often than men did, although a majority of women were still working more than 30 hours in 1998. In Belgium, 65.3% of the women employed in distributive trades were usually working 30 or more hours per week, whilst the male figure was equal to 86.7%. In Greece there was a more traditional structure to working hours, with 93.7% of women and 98.0% of men working 30 hours or more. In the Netherlands and the United Kingdom less than 50% of the women employed in distributive trades worked 30 hours or more per week (45.0% and 44.9%). The differences with the corresponding figures for male workers were more significant for these countries than any others in the EU, with corresponding male rates for working 30 or more hours per week equal to 83.7% and 84.1% respectively.

In Denmark and Germany the change in the structure of working time led to a marked increase in the share of working contracts with less than 10 hours per week. These contracts accounted for 9.2% of all contracts in Denmark and 4.0% of all contracts in Germany. The German figure could be largely attributed to the introduction of the so-called "630-Mark-Job", which required no social security payments up to this threshold in earnings. This tax incentive to encourage job creation was largely aimed at women with children. Indeed, the share of German women working less than 10 hours per week was nearly five times higher than the corresponding figure for German men.

Work at weekends, in the evening and at night increased moderately in both wholesale and retail trade, with changes in the latter more significant. The increase in work during weekends was to a large extent due to increasing Saturday work.

In retail trade the share of persons employed working weekends was between 25% and 50% within the Member States. In the Netherlands the share of persons usually working at the weekend increased by 4.1 percentage points between 1993 and 1998 to reach 35.0% of the retail trade labour force. There was an intensive discussion on further extending opening hours in Germany, reflected in the relatively low share of weekend work in the activity of retail trade (26.1% in 1997). Germany and Austria reported especially low rates of Sunday work, largely due to legal restrictions (3.7% and 4.4% respectively in 1997).

Evening work (work done after the usual hours of working time) was of far more importance in Germany, with an extension of opening hours resulting in 24.4% of the retail trade labour force usually working in the evenings during 1997. In Greece the figure for evening work rose to as high as 40.7% of the labour force in 1998 (the highest in the EU). There was great diversity in the figures for evening work in the EU, with France reporting that only 4.1% of its retail trade labour force worked in the evening.

In wholesale trade the share of weekend and evening work was significantly lower than in retail trade and growing at a slower pace. However, night work was more common in wholesale trade, although the share of persons working at night was generally low. There was no uniform trend to patterns of night work within Europe.

During the nineties, shift work in distributive trades rose moderately in the EU. In the United Kingdom, 10.0% of all persons employed in retail trade were working shifts in 1998, whilst in Denmark and the Netherlands the figures were only 1.3% and 1.8%.

Educational attainment and training

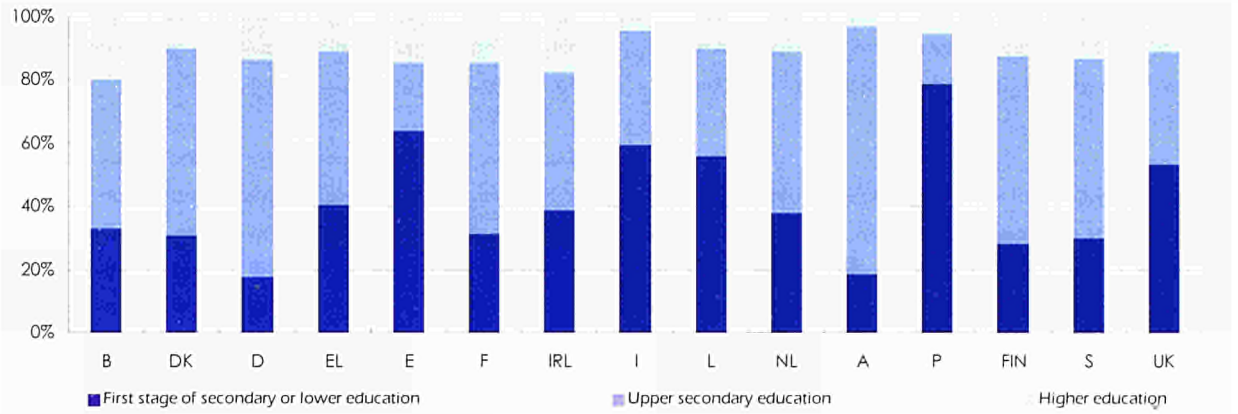
Increased competitive pressure often leads to technological changes in the workplace, such as the increased use of electronic devices. In turn these changes may have implications for the training and qualifications required by employers to fill certain posts.

Distributive trades have traditionally provided jobs for mainly low-skilled workers. Nevertheless, some Member States reported declining shares of persons employed with a primary or lower secondary education (remained in education until at least 15 years of age). This may be due to high unemployment rates in Europe making qualified persons more willing to take jobs requiring lower qualifications. A second reason may be that a number of women choose to accept part-time posts knowing they are over-qualified for their position, but preferring the flexibility that such work allows them with respect to their family and lifestyle.

In both wholesale and retail trade there was a tendency to see the number of persons employed with a primary or lower secondary education decline. The downward trend was less marked in wholesale trade, where there were relatively few persons with a primary or lower secondary education compared to the activity of retail trade. Within the EU, the southern Member States reported the highest shares of persons with a primary or lower secondary education. In retail trade the following shares were recorded in 1997, 80.9% in Portugal, 64.6% in Spain and 63.3% in Italy. In most of the other European countries there were shares of between 30% and 40%. The general decline in persons employed with a primary or lower secondary education was usually in favour of persons with an upper secondary education (remained in education until at least 17 years of age). Persons employed with a higher education (first degree and above or higher vocational qualifications) were found more often in the larger Member States, where the largest enterprises were located. In Italy, the share of highly educated persons in the labour force was the lowest share of all EU countries in wholesale trade (7.4% in 1997) and the second lowest in retail trade (3.5% in 1997).

Figure 3.2.8

Share of distributive trades' labour force by educational attainment, 1997



Source: LFS

Table 3.2.3

Share of distributive trades' labour force who received no training in the previous four weeks, 1997 (%)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK
Motor trade	41.5	62.9	37.7	66.7	46.5	33.1	56.2	64.4	37.8	49.9	44.9	49.4	41.2	42.2	:
Wholesale trade	33.3	36.2	27.4	46.0	38.2	17.6	38.2	52.6	21.3	31.9	26.4	45.0	35.9	43.8	:
Retail trade	51.9	68.6	31.9	74.5	64.2	39.6	53.2	73.0	33.4	59.4	38.1	65.4	49.2	53.9	:

Source: LFS

Administrations were well aware of the fact that the high rates of unemployment necessitated the creation of many new jobs. Many persons who remain unemployed for a long period of time have only a low level of educational attainment. As a high proportion of jobs in wholesale and retail trade were low-skilled, it may be expected that any job creation that takes place within distributive trades should help to reduce long-term unemployment.

Technological changes due to innovation and information technology often require a rapid adaptation of the labour force. Technological developments in distributive trades that have had a major impact on the labour force include scanner checkouts, which besides offering a faster service to the customer, have also been integrated into management systems, giving information on customer flows, the structure of sales and the performance of staff. At the same time these systems are used to automate logistics through registering minimum stock levels, calculating daily sales and electronically transferring orders and payments. Whilst employees working within the shop require few skills, those responsible for stock management and information technology require far higher levels of training and education.

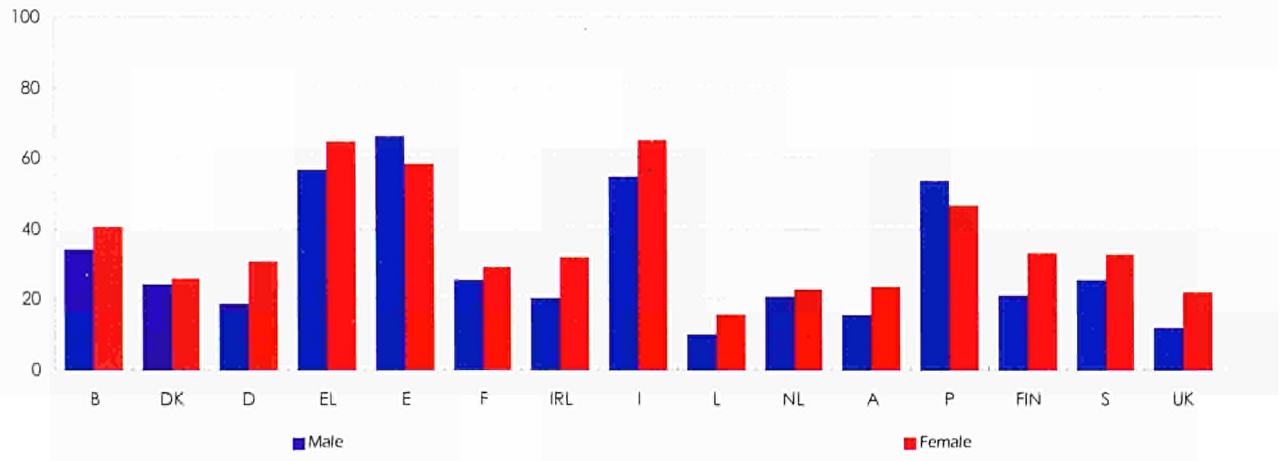
Temporary work and unemployment

An additional way for employers to meet the increased variability in customer frequency was to turn to a temporary workforce. Temporary work contracts were especially common in Spain, Greece, Italy and Portugal in retail trade in 1997. In the majority of the Member States the share of employees working on a temporary basis was growing during the nineties. Although temporary working was more common in retail trade than in wholesale trade, employers in the latter were increasingly offering this kind of working contract to their staff.

The share of employees who actually wanted a temporary work contract was low. In most countries there was a share of between 0.1% and 1.5%, with the exceptions being in retail trade for the Netherlands, Sweden and Ireland where 8.3%, 5.1% and 4.8% of temporary employees stated that they did not want a permanent job. Hence, whilst there were greater numbers of persons entering and leaving the labour force, there was also the increased possibility to arrange work to suit the needs of individual employees.

Figure 3.2.9

Share of distributive trades' labour force with a temporary contract, 1997 (%)



Source: LFS

Whilst distributive trades continued to create jobs there was an increasing trend for workers to be laid off within the activity. Whilst job creation was evident, it was also true that job displacement figures were rising. During the nineties the unemployment rate of those whose previous job was in distributive trades increased in the majority of Member States. In several countries the male unemployment rate grew at a much faster pace than the female figure. For example, in Germany male unemployment, for those having previously worked in distributive trades, grew four times faster than the corresponding female figures, whilst in Italy the rate of growth was almost twice as fast as the corresponding female figure (again between 1992 and 1997).

In view of general high unemployment rates, some European countries changed their regulations on working-times. For example, France and Italy lowered restrictions on unusual working hours (evenings, Sundays or festivals). Between 1996 and 1997, French unemployment rates for those formerly employed in the activity of distributive trades decreased by 3.4%. In Portugal, Denmark, Ireland and the United Kingdom the unemployment rate of persons previously working in distributive trades decreased between 1992 and 1997.

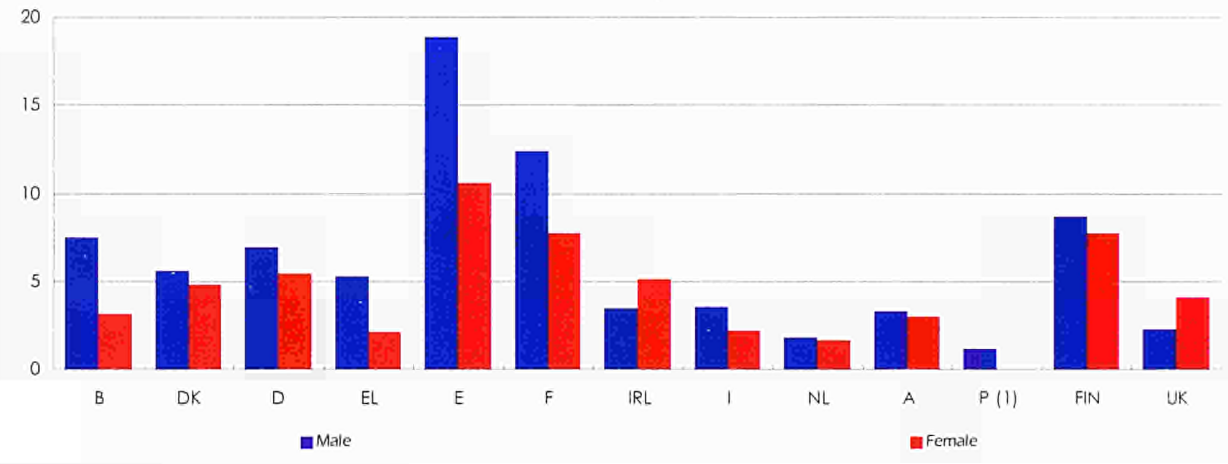
Trends in earnings and labour costs

Monthly earnings within distributive trades differed substantially between the three different distribution activities. Employees in retail trade received the lowest earnings, whilst in wholesale trade earnings were higher than in the motor trade (except in Greece, where motor trade paid slightly more than wholesale trade). Monthly earnings in retail trade accounted for 76.9% of average earnings in wholesale trade within the EU (figures for 1995). The difference in earnings of the two activities was lower in Spain and Germany (87.6% and 82.2%).

If we look at earnings by gender, women tended to earn less than their male colleagues. In the EU the differential was equivalent to 25% for the whole of distributive trades. France, the Netherlands and the United Kingdom reported a larger difference between average male and female earnings, with females receiving 65.8%, 66.4% and 66.9% of the average male earnings in 1995. It should be noted that these figures are not corrected for the differences in the period worked.

Figure 3.2.10

Share of distributive trades' labour force who were made unemployed, 1997 ——— (% of total)



(1) Portuguese data for women is not available.

Source: LFS

In several Member States part-time earnings were equal to less than 50% of full-time earnings. This was the case in the United Kingdom, France and the Netherlands where the lowest shares in Europe were recorded, some 28.3%, 35.5% and 37.4% of the full-time averages. If we take part-time earnings by gender, women earned less than their male part-time colleagues in Germany, some 88.2% of average male part-time earnings, whilst in Italy the share was 86.2%. There were five countries where female part-time earnings were higher than average male part-time earnings. This was especially true in Luxembourg (122.0%), Denmark (118.3%) and Sweden (117.8%).

In Greece and in Sweden persons with a low level of education earned 70.7% and 68.6% of the average earnings of their highly educated colleagues. The differences were far more dramatic in Austria, Portugal and Italy, where those with a lower education received only 36.0%, 36.8% and 46.2% of the average earnings of their highly educated colleagues.

Labour costs in distributive trade were rising moderately within the EU. In Spain distributive trades' labour costs declined by 5.1% between 1992 and 1996, explained by a substantial decrease in the rate of indirect costs. We should also note that during this period very high unemployment rates were recorded in Spain and these generated an excess supply of labour.

Table 3.2.4

Main indicators for earnings in the EU, 1995

	Motor trade	Wholesale trade	Retail trade
Mean gross hourly earnings (ECU)	7.8	9.1	6.9
Mean hourly overtime earnings (ECU)	8.9	9.9	7.7
Mean weekly hours (units)	39.4	39.4	38.5
Mean weekly overtime hours (units)	0.6	0.7	1.0

Source: SES

Indeed, high unemployment forced a discussion on the possibilities to reduce indirect labour costs, particularly social security charges. To raise the employability of low-skilled members of the labour force, many administrations turned to incentives for reducing indirect charges on both employers and employees.

Table 3.2.5

Average gross hourly earnings in distributive trades, 1995 (ECU)

	Motor trade		Wholesale trade		Retail trade	
	Female	Male	Female	Male	Female	Male
EU-15	7.7	8.0	8.3	12.2	6.9	6.7
B	8.8	8.3	10.1	13.0	8.6	8.4
DK	13.7	11.8	13.9	13.6	12.1	8.4
D	12.5	14.2	11.0	13.6	10.7	11.3
EL	3.5	4.1	3.9	4.1	3.9	4.4
E	4.1	7.3	3.8	4.8	4.5	5.3
F (1)	7.5	8.4	8.0	18.1	6.4	7.2
I	7.3	6.3	6.6	8.2	6.2	6.9
L	10.9	12.5	12.0	12.9	8.6	10.8
NL	8.6	7.6	8.7	11.5	7.3	7.8
P	2.4	2.7	2.5	3.3	3.1	2.9
FIN	9.3	11.0	9.5	9.5	8.9	9.0
S	8.9	10.2	9.1	11.5	8.8	9.0
UK	5.2	5.6	5.4	9.1	5.0	5.7

(1) 1994.

Source: SES

Motor trade

Motor trade is a very special part of distributive trades, since motor vehicles and motorcycles are not everyday commodities. NACE Rev. 1 Division 50 encompasses the sale, maintenance and repair of motor vehicles and motorcycles, as well as the retail sale of automotive fuel.

The world market for motor vehicles, including cars, trucks, buses and coaches was equal to 54 million units in 1997. Production capacity was well above that figure, with considerable over-capacity (some 20 million units). Even so, plans to set-up new car industries exist in many countries. As a result, competition between manufacturers is now as intense as ever. Its effects cannot leave the motor vehicle wholesale and retail markets unscathed (it is important to note that the motor trade data covers wholesale and retail activities). Indeed, there has been a general tendency towards fewer but larger dealerships, i.e. dealerships employing a greater number of persons and selling more cars.

In this section we will review the latest structural business statistics as well as the main trends in the motor trade, comparing the performance of Europe with that of the USA and Japan. We will mainly focus on car trade, which constitutes by far the most important part of the activity of motor trade. The majority of the data provided relates to 1996. At the end of this section, there is a statistical annex with data for EEA countries from the SBS Regulation at the 3-digit level of the NACE Rev. 1 classification system.

Motor trade in the European Economic Area

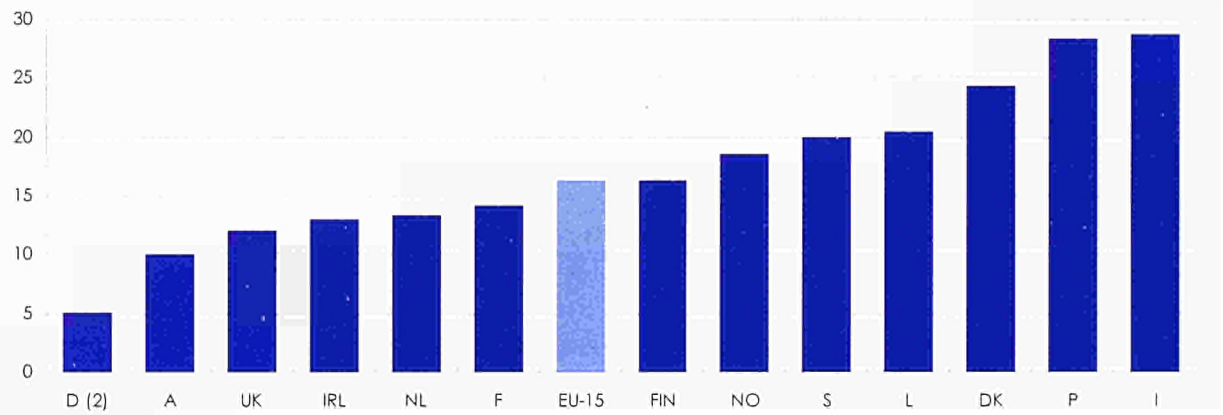
Motor trade activities recorded almost 610 thousand enterprises in the EU, collectively employing about 3.1 million persons in 1996 within the EU. This represented 13.8% of employment in distribution in the EU as a whole and between 9.9% and 17.9% nationally depending on the country being studied.

As with distribution in general, the largest number of enterprises was recorded in Italy with over 160 thousand. The largest number of persons employed was in Germany with over 650 thousand persons active in motor trade (estimate), followed by the United Kingdom, Italy and France with between 418 thousand and 638 thousand persons.

We find that the average size of enterprises ranged from 2.36 persons employed per enterprise in Greece (estimate) in 1996 to 9.9 in Austria. When measured in terms of turnover per enterprise, Greek enterprises were the smallest (with 100 thousand ECU per enterprise), whilst enterprises in Luxembourg were the largest with 2.6 million ECU per enterprise.

In Italy there were twice as many enterprises in the sale, maintenance and repair of motor vehicles and motorcycles and retail sale of automotive fuel than there were in France or the United Kingdom. The density of enterprises in Italy was the highest in Europe, amongst the countries for which data was available (29 enterprises per 10,000 inhabitants). For means of comparison, we may note that in Austria and the United Kingdom there were only 10 and 12 motor trade enterprises per 10,000 inhabitants.

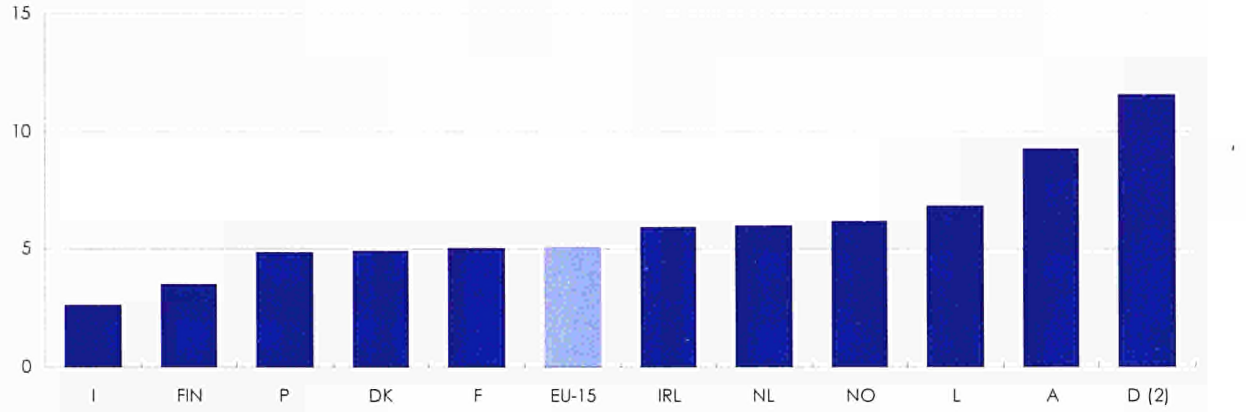
Figure 4.1: motor trade (NACE Rev. 1 Division 50)
Average number of enterprises per 10,000 inhabitants, 1996 (1) — **(units)**



(1) DK, 1995.
(2) Excluding NACE Rev. 1 50.2.

Source: SBS

Figure 4.2: motor trade (NACE Rev. 1 Division 50)
Average number of persons employed per enterprise, 1996 (1) — **(units)**



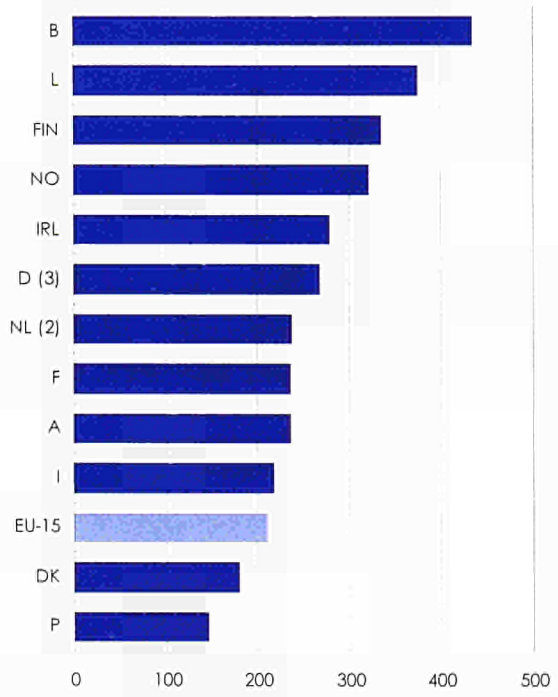
(1) D, FIN and IRL, 1997; DK and NL, 1995.
(2) Excluding NACE Rev. 1 50.2.

Source: SBS

Turning attention to the composition and costs of the labour force, the proportion of employees in total employment in motor trade was generally lower than in wholesale trade but higher than for retail trade. As in distribution in general, Italy and Greece had the lowest proportion of employees in this activity with less than half of the workforce receiving a wage or salary.

Annual average personnel costs in 1996 ranged from 9.3 thousand ECU per employee in Portugal to 31.9 thousand ECU in Sweden. These figures are influenced by the degree of part-time employment in each country and activity because the employee figures are head counts and not full-time equivalents.

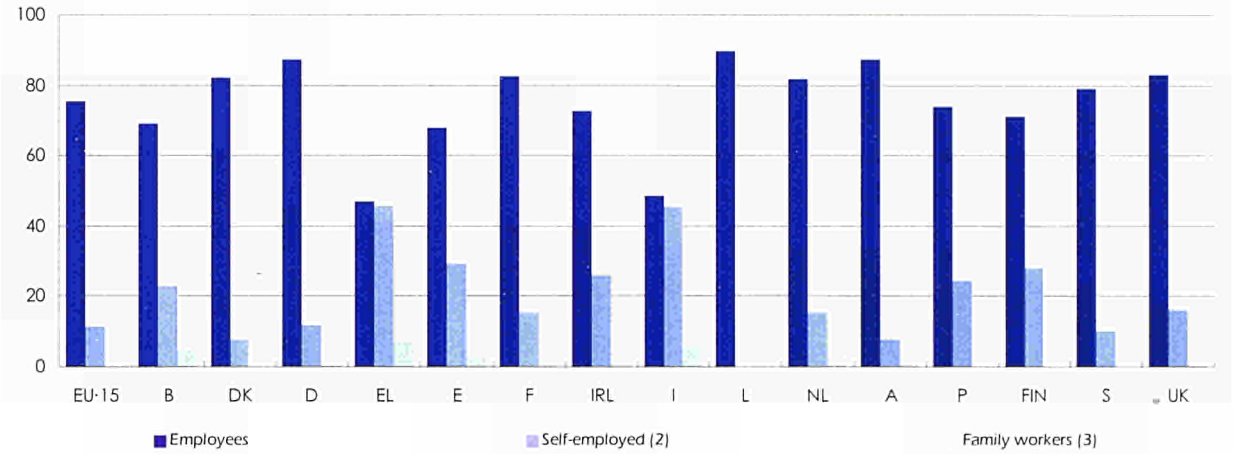
Figure 4.3: motor trade (NACE Rev. 1 Division 50)
Average turnover per person employed, 1996 (1) — **(thousand ECU)**



(1) D, FIN and IRL, 1997; DK and NL, 1995.
(2) Excluding NACE Rev. 1 50.1 and 50.3.
(3) Excluding NACE Rev. 1 50.2.

Source: SBS

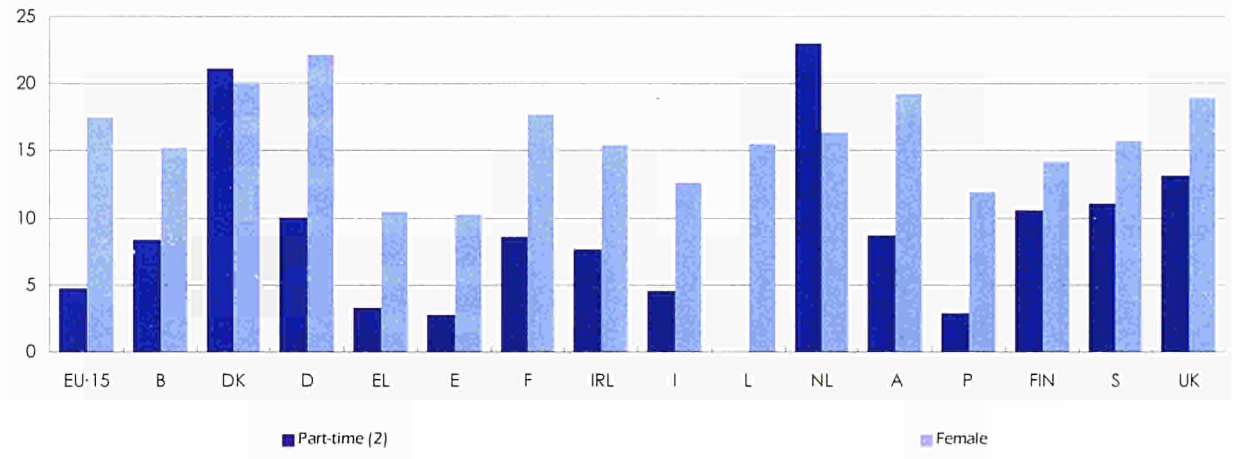
Figure 4.4: motor trade (NACE Rev. 1 Division 50)
Employment characteristics, 1997 (1) (% share of total employment)



(1) Earlier years had to be used for some countries.
(2) L not available.
(3) EU-15, DK, L, P, FIN and S not available.

Source: LFS

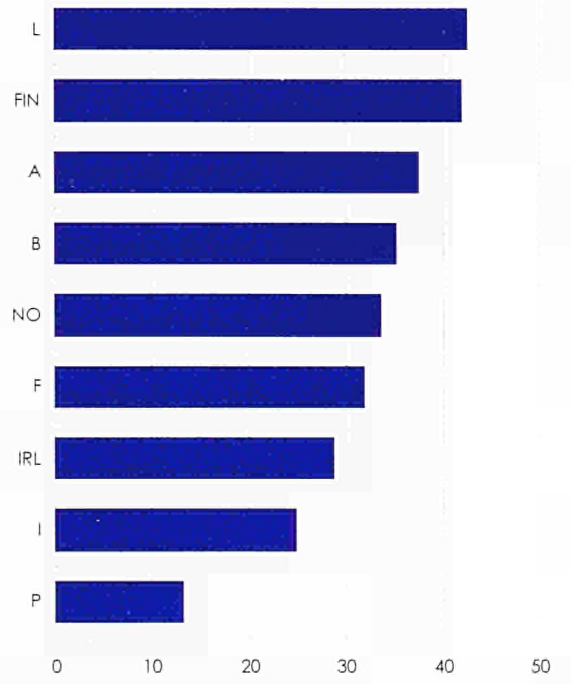
Figure 4.5: motor trade (NACE Rev. 1 Division 50)
Part-time and female participation rates, 1998 (1) (% share of total employment)



(1) EU-15 and IRL, 1997.
(2) L not available; FIN, 1996.

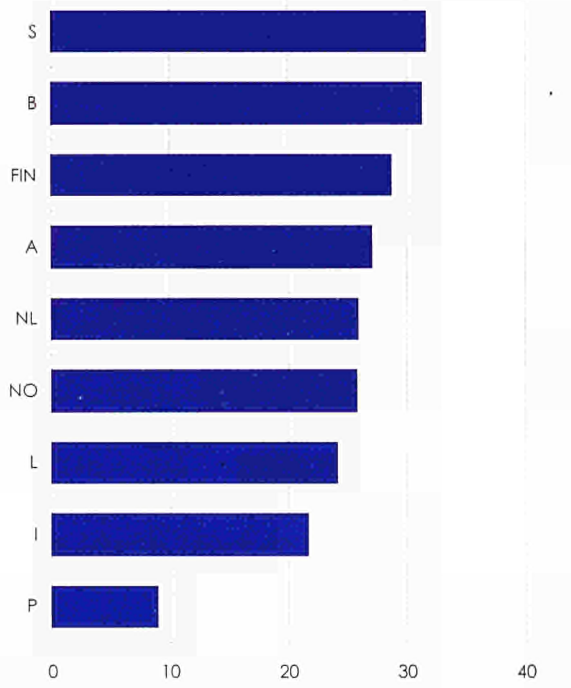
Source: LFS

Figure 4.6: motor trade (NACE Rev. 1 Division 50)
Value added per person employed,
1996 (1) ——— (thousand ECU)



(1) FIN and IRL, 1997; A, 1995.
Source: SBS

Figure 4.7: motor trade (NACE Rev. 1 Division 50)
Personnel costs per employee,
1996 (1) ——— (thousand ECU)

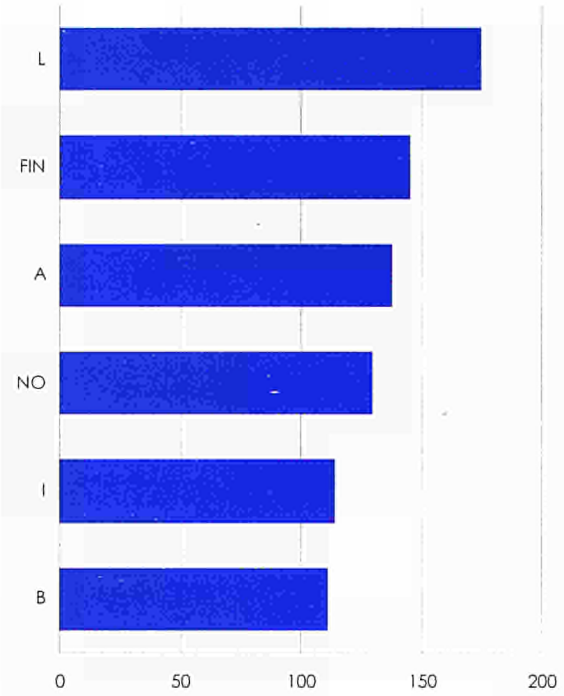


(1) FIN, 1997; A, NL and P, 1995.
Source: SBS

In terms of productivity the lowest value added per head figures recorded in 1996 were in Portugal (13.3 thousand ECU) followed by Italy (24.9 thousand ECU). The highest were recorded in Luxembourg and Finland with 42.6 and 42.1 thousand ECU per head respectively. Looking at 1995 data we can see that Austria also recorded high levels of labour productivity. If we adjust these figures to take account of the costs of labour input, rather than a simple head count, and approximate the per head costs of the workforce not receiving a fixed wage or salary as being equivalent to those of employees, we arrive at wage adjusted labour productivity. One noticeable movement was that of Belgium, where relatively high labour costs made it the least productive labour force using this measure. Whilst not affecting the ranking of countries greatly, these adjustments do bring the productivity levels of the countries closer together. In Luxembourg, 1.75 ECU of value added is generated for every ECU of adjusted personnel charges compared to 1.12 ECU in Belgium.

The largest activities were clearly the sales and repair of motor vehicles (NACE Rev. 1 Groups 50.1 and 50.2), however, which of the two is larger depends on the measure used and the country in question. In nearly all countries the largest activity in terms of the number of enterprises was the repair of motor vehicles, the exceptions to this were Luxembourg and the United Kingdom. Most countries had a larger proportion of employment in sales rather than repairs of motor vehicles, the largest shares were 56.9% in Luxembourg and 52.2% in France. In terms of turnover and value added the picture is much clearer and the sale of motor vehicles is the largest activity in all countries. In France the sale of motor vehicles accounted for 72.3% of turnover in motor trade and 70.7% in the United Kingdom.

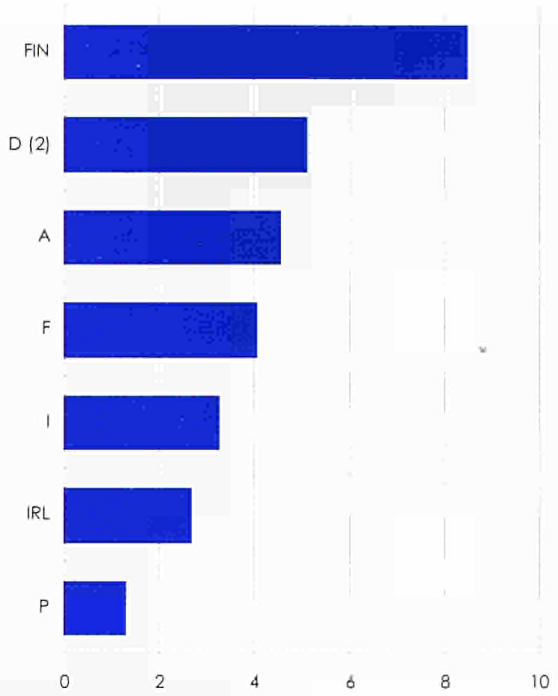
Figure 4.8: motor trade (NACE Rev. 1 Division 50)
Wage adjusted labour productivity,
1996 (1) (%)



(1) FIN, 1997; A, 1995.

Source: SBS

Figure 4.9: motor trade (NACE Rev. 1 Division 50)
Gross investment per person employed,
1997 (1) (thousand ECU)



(1) A and P, 1995; F and I, 1996.
(2) Excluding NACE Rev. 1 50.2.

Source: SBS

The sale of motor vehicles, new or used, is known to be characterised by strong competition and to have a strong cyclical factor. New passenger car sales in the European Union averaged just over 12.5 million units during the period 1990 to 1998, with the main variation recorded during the recession of the early 1990's[1]. In 1990 just over 13 million new passenger cars were sold, as in the two following years. However, economic recession in mainland Europe caused sales to drop quickly in 1993 to just under 11 million units. Subsequent years have seen a recovery in the figures, which have since risen to record highs in 1998 of just over 13.9 million units. Amongst the different Member States, the countries with the highest number of units sold were Germany, Italy and the United Kingdom. The country with the highest absolute turnover figures in motor trade was Germany[2], followed by the United Kingdom, France and Italy.

The statistical Division of motor trade is composed of five heterogeneous groups, following the NACE Rev. 1 classification. The first three take account of the sale of motor vehicles, their parts and accessories and their repair, whilst all three of these functions are grouped together for motorcycles. Retail sale of automotive fuel constitutes the last Group.

(1) Source: European Automobile Manufacturers Association.

(2) It should be noted that German figures do not include NACE Rev. 1 Group 50.2 (the maintenance and repair of motor vehicles).

Sale of motor vehicles

This activity is by far the most important of the five Groups that make up the motor trade, both in terms of turnover and the number of persons employed. In 1996, Germany and the United Kingdom were the two countries with the highest absolute turnover figures, with over 90 billion ECU each. France and Italy followed with 71.6 billion ECU and 46.1 billion ECU respectively.

Turning to the study of derived ratios, we may compare more easily the performance of small and large countries. The following ratios give a better picture of the structure of this activity, which is noticeably different from the trends seen both in rest of the motor trade and also retail trade. Average turnover per enterprise was highest in Austria and Ireland, at 6.2 million ECU and 5.7 million ECU respectively. In Italy it was higher than in Denmark, France or the United Kingdom. Indeed, the three lowest average turnover figures were recorded in Denmark, France and the United Kingdom (all below 3 million ECU per enterprise).

If we turn to examine the number of enterprises per 10,000 inhabitants a similar picture is seen. It is interesting to note that Italy (normally characterised by a high density of enterprises in retail activities) has the lowest rate for the sale of motor vehicles, with enterprise density equal to only 2.2 enterprises per 10,000 inhabitants. On the other hand, those countries with the highest density, Luxembourg and the Netherlands (8.7 enterprises), Denmark (7.0 enterprises) and the United Kingdom (6.2 enterprises) were normally characterised by a low density of enterprises in other motor trade activities. This atypical situation may be partly explained by the fact that more motor vehicles were sold per 10,000 inhabitants in the latter group of countries. In addition, the capital costs involved with setting-up an enterprise in the motor trade were considerably higher than in many other distribution activities. This may have dissuaded many sole proprietors from setting-up business in this area.

As a result, it was therefore not surprising to find that the share of employees in the total number of persons employed was rather high in all the countries considered, compared with other commercial activities. The lowest share could be found in Italy, where 79% of all persons employed were employees (compared to other activities inside Italy this share was very high). On the other hand, 96% of the total number of persons employed in Austria and Norway were employees.

Maintenance and repair of motor vehicles

This activity follows more normal patterns seen in the majority of retail and motor trade. Average turnover per enterprise was much lower than in the previously analysed activity. Austria had the highest average turnover per repair enterprise, at almost 1 million ECU, followed at quite a distance by Luxembourg and the United Kingdom, where average turnover was over 0.5 million ECU. At the other end of the scale, the lowest figures were recorded in Italy and Portugal, where average turnover per enterprise was approximately equal to 100 thousand ECU.

The share of employees in the total number of persons employed is another indicator suggesting that the average size of the motor repair shops was smaller than motor vehicle dealerships. Italy had by far the lowest share in 1996, reaching only 39%, followed by Denmark (55%). In Austria, however, employees represented 91% of all persons employed, a figure only slightly below that for the sale of motor vehicles.

No clear pattern could be detected when looking at the enterprise density for this NACE Rev. 1 Group within Europe. On the one hand, Italy had 18 repair enterprises per 10,000 inhabitants, whilst the Netherlands (at the other end of the ranking) reported only 2 per 10,000 inhabitants. The rest of the countries could be put together in one of three groups: the first formed by the United Kingdom, Luxembourg and Austria with between 2 and 4 enterprises per 10,000 population; France and Ireland had around 6 enterprises per 10,000 inhabitants; whilst the Nordic countries all had between 8 and 12 enterprises.

Sale of motor vehicle parts and accessories

Average turnover per enterprise within the sale of motor vehicle parts and accessories was not as high as in the sale of motor vehicles, whilst being higher than in the maintenance and repair of motor vehicles. This indicator had its highest figures recorded in Austria (2.7 million ECU per enterprise in 1995), followed by the United Kingdom (2.1 million ECU) and Germany (2.4 million ECU). The lowest average turnover per enterprise was found in Portugal, where average values of 500 thousand ECU per enterprise were recorded.

If we turn to measure enterprise size by the ratio of the number of persons employed per enterprise, we find that this activity reported quite high values. Indeed, Germany and Austria (there were no data available for the United Kingdom) reported that the average number of persons employed was over 11, the highest

values in the EU. It was of little surprise to find that the lowest figures were recorded in Italy, where 3.9 persons were employed on average per enterprise.

The density of enterprises was rather low in this activity when compared to the other Groups that make up motor trade (with the exception of the sale, repair and maintenance of motorcycles and related parts and accessories). Of the countries analysed, Germany had the lowest enterprise density, with less than 1 enterprise per 10,000 of population. The United Kingdom and Austria followed, with around 1 enterprise per 10,000 inhabitants.

The share of employees in the total number of persons employed was very high in France, reaching almost 98%, whilst Austria did not lag far behind. Italy, with a share of only 62%, was the only country to record shares below the threshold of 75%.

Sale, repair and maintenance of motorcycles and related parts and accessories

The sale and repair of motorcycles displayed somewhat different structure to its "big brother" the sale of motor vehicles. The main difference lay in the fact that motorcycle dealerships were usually much smaller than car dealerships. This was illustrated by the indicator average turnover per enterprise, which was generally much lower for the sale and repair of motorcycles when compared to the sales figures for motor vehicles.

In the case of Italy the difference was especially high, with average turnover per enterprise some twelve times higher for the sale of motor vehicles than for the sale of motorcycles. In Finland the difference was also high, with average turnover per enterprise for motor vehicles higher by a factor of nine. The two countries with the highest average turnover per enterprise for the sale and repair of motorcycles were Luxembourg and Germany with figures of 1.6 and 1.5 million ECU, followed by the Netherlands and the United Kingdom with 1 million ECU each. Once again, Portugal had the smallest enterprises (using this measure), with an average turnover of 200 thousand ECU. Analysis of the average number of persons employed per enterprise confirmed the high number of small enterprises active within this NACE Rev. 1 Group. Enterprises in this industry generally employed far less persons than enterprises active in the sale of motor vehicles. For example, in Finland there was an average of 1.9 persons employed per enterprise, as opposed to an average of 6.3 persons within the sale of motor vehicles.

Personnel costs per employee were strikingly similar for all countries in this activity. Personnel costs per employee were in the range of 21 thousand to 27 thousand ECU (except in Sweden, where the figure rose somewhat to 29 thousand ECU).

Retail sale of automotive fuel

Personnel costs per employee were somewhat lower in the retail sale of automotive fuel, probably due to the fact that the labour skills required were less. The only exception was Sweden, where average personnel costs were almost 29 thousand ECU per employee, in line with the values seen for personnel costs in the other motor trade activities.

However, in contrast to the other groups that make-up the motor trade, several northern Member States reported that in the retail sale of automotive fuel they had low shares of employees in the total number of persons employed. This was the case in Denmark and Belgium, as well as in Italy. However, the country with the lowest share was Denmark, with a ratio of only 32%. In these three countries we may assume that the number of independent petrol stations was relatively high. Employees made up around 80% of all persons employed in Finland, Ireland, Luxembourg and Austria, where larger international players dominated the market.

When analysing the density of enterprises and average turnover per enterprise the figures for Luxembourg attract attention. Luxembourg had by far the highest density of enterprises in the EU, at almost 6 enterprises per 10,000 inhabitants, it also had by far the highest average turnover per enterprise, some 3.3 million ECU. These data could be explained by the fact that Luxembourg had the lowest fuel prices in Europe. This fact, coupled with its strategic location in the heart of Europe, meant that petrol stations in Luxembourg attracted a great number of foreign cars and international road freight. However, in terms of the average number of persons employed per enterprise Luxembourg did not report the highest averages. There were on average 5.5 persons employed per enterprise in Luxembourg, below the figures recorded in Denmark (8.8) and Norway (8.3). Italy once again reported the lowest average number of persons employed per enterprise (2.4).

Conclusions

European structural business statistics for trade in motor vehicles, motorcycles and automotive fuel broadly follow the patterns which are observed in the retail trade. However, when breaking

down the figures into the different activities, we should note one important exception, the sale of motor vehicles (NACE Rev.1 Group 50.1). This activity reported a distinctive feature, in that southern Member States reported that they had larger enterprises than in northern Europe, contrary to the data observed in all other motor trade activities (where small enterprises predominate in southern Europe). The two largest activities in terms of turnover and the number of persons employed were the sale and repair of motor vehicles.

Motor trade in the USA

In 1998 average sales per car dealership increased by 6% compared to 1997. This result was obtained "after a year marked by mergers, consolidation and labour disputes... strong performance was the result of high sales volumes and franchised dealers' successful efforts to control costs. New-vehicle sales reached 15.5 million units for the year and used-vehicle sales at franchised dealerships reached 12.1 million units"[3].

Motor trade is an extremely competitive and cyclically sector of the economy. This applies equally to global markets and not just the market of the USA. The number of dealerships in the USA was seen to decrease sharply during periods of recession. The largest downturns in American motor trade took place during the recessions of 1973-75 and 1980-82. From 1982 onwards there was little change in the number of dealerships. If we study the trend of persons employed within the activity, we find that a diverging trend took place. Whilst the number of dealerships (multi-establishment groups) was falling from 32 thousand (1972) to 26 thousand (1996), employment levels increased from under 800 thousand persons to over 1 million persons during the same period[4]. As a result of consolidation in the motor trade, dealerships have grown larger in size, employing a higher average number of workers and selling more cars. To demonstrate these trends, we find that in 1976 there were 13,200 dealers selling between zero and 150 cars per year. By 1996, there were only 4,664 dealers operating at the same level of activity. However, during the same period (1976 to 1996), the number of dealers selling at least 750 cars increased from 3,450 to 5,801.

Recent trends revealed that there were "significant differences in financial and operational performance between small and large dealerships"[5] within the USA economy. Whereas smaller dealerships, selling less than 300 vehicles per annum earned 1.4% net return on total sales, large dealerships saw their ratio rise to 1.9%. The difference in performance was even greater when analysing new-vehicle dealerships. "Larger dealers earned an average of 207 US dollars per vehicle, compared to a loss of 66 US dollars per vehicle for smaller dealerships". Economies of scale in areas such as advertising and personnel were the main reasons quoted for these differences.

Motor trade in Japan

Sales strategies in Japan have traditionally differed from those in the USA and the European Union. Showrooms used to be smaller and a great number of customers bought cars from door-to-door salesman (sometimes without even seeing the model beforehand). Japanese consumer attitudes have subsequently changed, and customers no longer rely on salesmen for the purchase of cars or motorcycles. Consequently dealers invested more money in significantly larger dealerships and less on door-to-door sales. Predictions show that by the turn of millennium 90% of all sales' operations will be made in showrooms.

This trend has had effects on structural business variables. As can be expected, the average number of persons employed per enterprise has increased in line with the size of dealerships. In 1996 direct franchise outlets numbered 17.4 thousand units, down from 17.9 thousand units in 1994[6]. At the same time, overall passenger car sales increased by more than 5% in both 1995 and 1996 (in nominal values). However, the economic crisis of 1997 that hit Japan had an adverse effect on car sales, with figures falling by 3.8%[7].

Motorcycle sales were also affected by the economic crisis, with turnover declining by 2.6% in 1997. Sales figures almost stagnated in preceding years, with growth of only 1.6% in 1995 and 0.6% in 1996. The number of motorcycles on the road in Japan has followed a downtrend trend during the last decade. Nevertheless, in 1997 there were 14.9 million units on the road, equal to around 12% of the worldwide total. This put Japan in third place in the global rankings for motorcycles, behind India and China.

(3) Source: National Automobile Dealers Association.

(4) U.S. Department of Labour; "Issues in Labour Statistics", January 1999.

(5) Source: National Automobile Dealers Association.

(6) Latham, Scott: "An analysis of the Auto Dealer Network in Japan", 1997.

(7) Source: Japan Automobile Manufacturers Association.

NACE Rev. 1 Group 50.1: SALE OF MOTOR VEHICLES

Table 4.1
Turnover characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Turnover (billion ECU)	23.2	6.9	95.5	:	:	71.6	5.6	46.1	1.2	:	11.3	11.7	5.8	12.3	93.0	10.1
Turnover/enterprise (million ECU)	:	1.9	4.2	:	:	2.4	5.7	3.7	3.2	:	6.2	2.6	4.3	3.3	2.6	4.9
Turnover/person employed (thousand ECU)	673	249	309	:	:	328	522	576	349	:	357	263	686	:	:	550
Turnover, share in NACE Rev. 1 50 (%)	69.4	60.8	:	:	:	72.3	67.1	48.5	52.9	:	63.4	58.0	55.4	55.6	70.7	62.6

(1) D, IRL and FIN, 1997; DK and A, 1995.

Table 4.2
Main indicators as a share of turnover, 1996 (1) (%)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Production value	:	:	:	:	:	20.3	13.3	:	18.2	:	22.9	:	13.5	:	:	17.9
Value added at factor cost	6.1	:	:	:	:	10.5	8.6	9.0	13.1	:	12.5	7.5	8.5	9.5	:	8.6
Personnel costs	3.9	:	:	:	:	:	:	3.8	6.7	:	8.3	:	4.7	6.4	4.6	5.6
Gross operating surplus	2.2	:	:	:	:	2.1	:	5.2	6.4	:	4.2	3.1	3.8	3.1	:	3.0
Gross investment in tangible goods	:	:	1.9	:	:	1.5	0.6	1.1	:	:	1.5	:	2.3	2.3	0.8	:

(1) D, IRL and FIN, 1997; A, 1995.

Table 4.3
Enterprise and employment characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Number of enterprises (thousands)	:	3.7	22.9	:	:	30.1	1.0	12.4	0.4	13.2	1.9	4.5	1.3	3.8	36.4	2.1
Number of persons employed (thousands)	34.5	27.8	309.4	:	:	218.4	10.8	80.2	3.3	82.3	31.6	44.6	8.5	:	:	18.4
Number of persons employed/enterprise (units)	:	7.6	13.5	:	:	7.2	10.9	6.5	9.1	6.1	17.3	9.8	6.3	:	:	8.9
Employees/persons employed (%)	77.4	80.9	:	:	:	95.2	91.5	78.9	92.0	81.6	96.1	95.0	94.6	:	:	96.1
Personnel costs/employee (thousand ECU)	34.4	:	:	:	:	:	:	27.9	25.4	26.7	30.7	:	34.0	33.9	:	32.2
Wages and salaries/personnel costs (%)	73.2	:	:	:	:	:	:	67.4	:	:	77.1	:	76.9	69.1	89.4	82.8
Persons employed, share in NACE Rev. 1 50 (%)	44.8	44.1	:	:	:	52.2	35.8	18.4	56.9	64.4	42.3	32.3	27.1	:	:	36.6

(1) D, IRL and FIN, 1997; DK, NL and A, 1995.

Table 4.4
Productivity/competitiveness characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Value added at factor cost (million ECU)	1,420	:	:	:	:	7,545	484	4,165	152	:	1,407	880	496	1,164	:	872
Value added/person employed (thousand ECU)	41.2	:	:	:	:	34.6	45.0	52.0	45.8	:	44.5	19.7	58.5	:	:	47.4
Gross op. surplus/pers. employed (thousand ECU)	14.6	:	:	:	:	6.8	:	30.0	22.4	:	15.0	8.1	26.4	:	:	16.5
Gross investment/pers. employed (thousand ECU)	:	:	5.9	:	:	4.9	3.3	6.5	:	:	5.3	:	15.5	:	:	:
Wage adjusted labour productivity (%)	119.8	:	:	:	:	:	:	186.6	180.3	:	145.0	:	172.2	:	:	147.2

(1) D, IRL and FIN, 1997; A, 1995.

Source: SBS

NACE Rev. 1 Group 50.2: MAINTENANCE AND REPAIR OF MOTOR VEHICLES

Table 4.5
Turnover characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Turnover (billion ECU)	3.6	1.8	:	:	:	9.5	0.6	10.8	0.1	1.3	2.9	2.1	2.0	3.1	10.0	1.8
Turnover/enterprise (million ECU)	:	0.3	:	:	:	0.3	0.3	0.1	0.6	0.4	1.0	0.1	0.4	0.3	0.5	0.6
Turnover/person employed (thousand ECU)	142	97	:	:	:	95	82	46	132	78	115	40	189	:	:	150
Turnover, share in NACE Rev. 1 50 (%)	10.8	15.6	:	:	:	9.6	8.6	11.3	3.0	:	16.3	10.5	18.7	13.9	7.6	11.2

(1) FIN, 1997; DK, NL and A, 1995.

Table 4.6
Main indicators as a share of turnover, 1996 (1) (%)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Production value	:	:	:	:	:	53.8	32.1	:	33.5	65.3	54.7	:	28.0	:	:	51.8
Value added at factor cost	19.4	:	:	:	:	27.6	21.0	31.7	26.5	:	25.9	22.2	19.7	23.0	:	18.3
Personnel costs	11.5	:	:	:	:	:	:	14.5	13.1	24.2	18.5	:	11.6	15.5	17.3	14.0
Gross operating surplus	7.9	:	:	:	:	6.5	:	17.2	13.4	:	7.5	6.4	8.1	7.5	:	4.4
Gross investment in tangible goods	:	:	:	:	:	3.3	4.0	5.7	:	:	3.1	:	4.2	2.9	0.9	:

(1) FIN, 1997; NL and A, 1995.

Table 4.7
Enterprise and employment characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Number of enterprises (thousands)	:	6.7	:	:	:	34.4	2.1	107.7	0.1	3.1	3.1	14.9	4.6	9.4	19.7	3.1
Number of persons employed (thousands)	25.4	18.3	:	:	:	100.8	7.1	235.2	0.5	16.3	25.1	52.8	10.4	:	:	12.1
Number of persons employed/enterprise (units)	:	2.7	:	:	:	2.9	3.4	2.2	4.3	5.0	8.3	3.5	2.2	:	:	3.9
Employees/persons employed (%)	61.6	55.4	:	:	:	81.2	67.8	39.3	78.6	75.3	90.8	79.2	79.5	:	:	83.5
Personnel costs/employee (thousand ECU)	26.6	:	:	:	:	:	:	16.9	21.9	25.0	23.5	:	27.7	29.7	:	25.0
Wages and salaries/personnel costs (%)	73.3	:	:	:	:	:	:	69.3	:	:	77.3	:	78.3	69.9	90.0	86.8
Persons employed, share in NACE Rev. 1 50 (%)	33.0	29.1	:	:	:	24.1	26.0	54.1	8.6	12.7	33.6	38.3	33.2	:	:	24.0

(1) FIN, 1997; DK, NL and A, 1995.

Table 4.8
Productivity/competitiveness characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Value added at factor cost (million ECU)	701	:	:	:	:	2,633	121	3,414	18	:	751	471	386	707	:	332
Value added/person employed (thousand ECU)	27.6	:	:	:	:	26.1	17.2	14.5	34.9	:	30.0	8.9	37.3	:	:	27.4
Gross op. surplus/pers. employed (thousand ECU)	11.2	:	:	:	:	6.2	:	7.9	17.7	:	8.6	2.6	15.3	:	:	6.5
Gross investment/pers. employed (thousand ECU)	:	:	:	:	:	3.1	3.3	2.6	:	:	3.6	:	8.0	:	:	:
Wage adjusted labour productivity (%)	103.7	:	:	:	:	:	:	86.0	159.2	:	127.5	:	134.8	:	:	109.6

(1) FIN, 1997; A, 1995.

Source: SBS

NACE Rev. 1 Group 50.3: SALE OF MOTOR VEHICLE PARTS AND ACCESSORIES

Table 4.9
Turnover characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Turnover (billion ECU)	3.5	0.8	17.1	:	:	10.5	:	8.7	0.1	:	2.0	1.9	1.4	2.1	12.2	1.1
Turnover/enterprise (million ECU)	:	0.9	2.4	:	:	1.7	:	0.8	1.3	:	2.7	0.5	1.0	1.3	2.1	1.1
Turnover/person employed (thousand ECU)	334	164	214	:	:	183	:	208	232	:	230	107	224	:	:	230
Turnover, share in NACE Rev. 1 50 (%)	10.6	7.4	:	:	:	10.6	:	9.1	6.3	:	11.5	9.3	13.4	9.7	9.3	6.8

(1) D and FIN, 1997; DK and A, 1995.

Table 4.10
Main indicators as a share of turnover, 1996 (1) (%)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Production value	:	:	:	:	:	38.6	:	:	22.4	:	31.9	:	28.2	:	:	34.0
Value added at factor cost	12.2	:	:	:	:	20.5	:	15.8	16.3	:	20.3	13.4	19.1	14.8	:	17.0
Personnel costs	8.3	:	:	:	:	:	:	8.1	10.7	:	12.2	:	11.6	9.7	10.6	11.8
Gross operating surplus	3.8	:	:	:	:	4.5	:	7.7	5.5	:	8.1	5.0	7.5	5.1	:	5.2
Gross investment in tangible goods	:	:	1.8	:	:	2.2	:	1.5	:	:	1.9	:	2.3	1.8	1.0	:

(1) D and FIN, 1997; A, 1995.

Table 4.11
Enterprise and employment characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Number of enterprises (thousands)	:	0.9	7.2	:	:	6.0	:	10.6	0.1	2.2	0.8	3.4	1.4	1.6	5.8	1.0
Number of persons employed (thousands)	10.6	5.1	80.0	:	:	57.2	:	41.8	0.6	16.3	8.9	17.6	6.3	:	:	4.8
Number of persons employed/enterprise (units)	:	5.8	11.2	:	:	9.5	:	3.9	5.5	7.5	11.6	5.1	4.5	:	:	4.8
Employees/persons employed (%)	80.4	79.9	:	:	:	97.8	:	61.8	85.8	86.4	94.4	92.0	90.6	:	:	91.2
Personnel costs/employee (thousand ECU)	34.7	:	:	:	:	:	:	27.1	29.0	28.0	29.7	:	28.8	35.0	:	29.7
Wages and salaries/personnel costs (%)	74.2	:	:	:	:	:	:	65.4	:	:	78.2	:	77.7	69.6	89.5	83.9
Persons employed, share in NACE Rev. 1 50 (%)	13.7	8.2	:	:	:	13.7	:	9.6	10.2	12.8	11.9	12.8	20.0	:	:	9.5

(1) D and FIN, 1997; DK, NL and A, 1995.

Table 4.12
Productivity/competitiveness characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Value added at factor cost (million ECU)	430	:	:	:	:	2,142	:	1,367	22	:	416	253	269	317	:	188
Value added/person employed (thousand ECU)	40.7	:	:	:	:	37.5	:	32.7	37.7	:	46.8	14.4	43.0	:	:	39.2
Gross op. surplus/pers. employed (thousand ECU)	12.8	:	:	:	:	8.3	:	16.0	12.9	:	18.8	5.3	16.9	:	:	12.1
Gross investment/pers. employed (thousand ECU)	:	:	4.0	:	:	4.0	:	3.2	:	:	4.4	:	5.1	:	:	:
Wage adjusted labour productivity (%)	117.3	:	:	:	:	:	:	120.8	130.2	:	157.6	:	149.4	:	:	131.8

(1) D and FIN, 1997; A, 1995.

Source: SBS

NACE Rev. 1 Group 50.4: SALE, MAINTENANCE AND REPAIR OF MOTORCYCLES AND RELATED PARTS AND ACCESSORIES

Table 4.13
Turnover characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Turnover (billion ECU)	0.6	0.1	2.6	:	:	2.7	:	3.9	0.0	0.7	0.3	0.8	0.1	0.3	1.2	0.1
Turnover/enterprise (million ECU)	:	0.5	1.5	:	:	0.6	:	0.4	1.6	1.0	1.2	0.2	0.5	0.5	1.0	0.5
Turnover/person employed (thousand ECU)	323	218	298	:	:	218	:	204	341	311	256	99	281	:	:	215
Turnover, share in NACE Rev. 1 50 (%)	1.7	0.7	:	:	:	2.7	:	4.1	0.8	:	1.4	3.9	0.8	1.2	0.9	0.6

(1) D and FIN, 1997; DK, NL and A, 1995.

Table 4.14
Main indicators as a share of turnover, 1996 (1) (%)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Production value	:	:	:	:	:	25.3	:	:	20.8	21.1	28.4	:	23.1	:	:	24.0
Value added at factor cost	6.9	:	:	:	:	13.8	:	11.0	10.9	:	17.3	10.0	12.1	14.4	:	12.7
Personnel costs	3.5	:	:	:	:	:	:	3.6	5.6	5.6	8.6	:	6.7	8.6	7.1	8.9
Gross operating surplus	3.4	:	:	:	:	4.1	:	7.5	5.2	:	8.6	4.3	5.4	5.8	:	3.8
Gross investment in tangible goods	:	:	1.9	:	:	1.2	:	1.5	:	:	4.0	:	1.3	1.4	1.1	:

(1) D and FIN, 1997; NL and A, 1995.

Table 4.15
Enterprise and employment characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Number of enterprises (thousands)	:	0.1	1.7	:	:	4.5	:	9.5	0.0	0.7	0.3	3.2	0.2	0.6	1.2	0.2
Number of persons employed (thousands)	1.8	0.4	8.6	:	:	12.3	:	18.9	0.1	2.2	1.0	7.9	0.3	:	:	0.5
Number of persons employed/enterprise (units)	:	2.5	5.0	:	:	2.7	:	2.0	4.5	3.3	4.7	2.5	1.9	:	:	2.6
Employees/persons employed (%)	47.7	65.1	:	:	:	81.0	:	35.6	80.0	70.1	82.5	66.7	72.9	:	:	78.6
Personnel costs/employee (thousand ECU)	23.6	:	:	:	:	:	:	20.5	24.0	24.9	26.7	:	25.9	28.8	:	24.3
Wages and salaries/personnel costs (%)	76.9	:	:	:	:	:	:	67.6	:	:	78.2	:	80.5	70.1	88.7	85.5
Persons employed, share in NACE Rev. 1 50 (%)	2.3	0.6	:	:	:	2.9	:	4.4	0.9	1.8	1.3	5.7	1.0	:	:	1.0

(1) D and FIN, 1997; DK, NL and A, 1995.

Table 4.16
Productivity/competitiveness characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Value added at factor cost (million ECU)	40	:	:	:	:	369	:	425	2	:	45	79	11	39	:	13
Value added/person employed (thousand ECU)	22.2	:	:	:	:	30.1	:	22.5	37.0	:	44.2	9.9	34.1	:	:	27.2
Gross op. surplus/pers. employed (thousand ECU)	10.9	:	:	:	:	9.0	:	15.2	17.8	:	22.1	4.2	15.2	:	:	8.2
Gross investment/pers. employed (thousand ECU)	:	:	5.8	:	:	2.6	:	3.0	:	:	10.2	:	3.7	:	:	:
Wage adjusted labour productivity (%)	94.1	:	:	:	:	:	:	109.6	154.2	:	165.3	:	131.6	:	:	112.2

(1) D and FIN, 1997; A, 1995.

Source: SBS

NACE Rev. 1 Group 50.5: RETAIL SALE OF AUTOMOTIVE FUEL

Table 4.17
Turnover characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Turnover (billion ECU)	2.5	1.8	6.2	:	:	4.7	1.3	25.7	0.8	5.0	1.3	3.7	1.2	4.4	15.2	3.0
Turnover/enterprise (million ECU)	:	1.4	0.9	:	:	0.6	1.0	1.1	3.3	3.0	0.7	1.8	1.0	1.9	1.9	1.7
Turnover/person employed (thousand ECU)	522	156	114	:	:	162	166	438	591	464	163	247	211	:	:	209
Turnover, share in NACE Rev. 1 50 (%)	7.5	15.6	:	:	:	4.8	15.6	27.0	37.0	:	7.4	18.4	11.7	19.7	11.5	18.8

(1) D, IRL and FIN, 1997; DK, NL and A, 1995.

Table 4.18
Main indicators as a share of turnover, 1996 (1) (%)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Production value	:	:	:	:	:	27.6	16.1	:	10.2	10.9	25.5	:	19.7	:	:	19.2
Value added at factor cost	5.0	:	:	:	:	14.1	10.6	5.7	6.8	:	14.2	4.0	12.5	9.8	:	9.6
Personnel costs	1.9	:	:	:	:	:	:	1.4	2.8	3.3	9.7	:	8.6	6.7	3.1	8.0
Gross operating surplus	3.1	:	:	:	:	1.9	:	4.3	4.0	:	4.5	1.0	3.9	3.1	:	1.6
Gross investment in tangible goods	:	:	2.4	:	:	1.3	0.9	0.4	:	:	2.5	:	1.5	1.5	0.3	:

(1) D, IRL and FIN, 1997; NL and A, 1995.

Table 4.19
Enterprise and employment characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Number of enterprises (thousands)	:	1.3	7.3	:	:	7.4	1.3	24.2	0.2	1.6	2.0	2.1	1.2	2.3	8.0	1.8
Number of persons employed (thousands)	4.8	11.4	54.5	:	:	29.3	7.9	58.6	1.4	10.7	8.1	15.0	5.8	:	:	14.6
Number of persons employed/enterprise (units)	:	8.8	7.5	:	:	4.0	6.3	2.4	5.5	6.4	4.0	7.3	4.7	:	:	8.3
Employees/persons employed (%)	44.2	32.3	:	:	:	91.5	80.8	32.4	81.3	76.6	77.2	94.6	80.6	:	:	95.1
Personnel costs/employee (thousand ECU)	22.4	:	:	:	:	:	:	18.5	20.0	19.8	20.5	:	22.4	28.8	:	17.6
Wages and salaries/personnel costs (%)	76.9	:	:	:	:	:	:	68.0	:	:	77.6	:	78.6	70.4	90.9	86.8
Persons employed, share in NACE Rev. 1 50 (%)	6.2	18.1	:	:	:	7.0	26.2	13.5	23.5	8.4	10.9	10.9	18.6	:	:	28.9

(1) D, IRL and FIN, 1997; DK, NL and A, 1995.

Table 4.20
Productivity/competitiveness characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Value added at factor cost (million ECU)	126	:	:	:	:	670	139	1,457	55	:	189	148	153	425	:	293
Value added/person employed (thousand ECU)	26.1	:	:	:	:	22.9	17.7	24.9	40.1	:	23.2	9.9	26.3	:	:	20.1
Gross op. surplus/pers. employed (thousand ECU)	16.2	:	:	:	:	3.0	:	18.9	23.8	:	7.3	2.4	8.3	:	:	3.5
Gross investment/pers. employed (thousand ECU)	:	:	2.8	:	:	2.1	1.5	1.6	:	:	4.1	:	3.2	:	:	:
Wage adjusted labour productivity (%)	116.6	:	:	:	:	:	:	134.8	200.6	:	113.0	:	117.4	:	:	114.8

(1) D, IRL and FIN, 1997; A, 1995.

Source: SBS

Wholesale trade

Wholesale trade is an essential activity for a modern economy. It plays an important logistical role, moving goods the first step from the producer towards consumers. Besides, wholesale trade employs a considerable number of people and generates an important share of a modern economy's value added; about 7.5% of all of the European Union's enterprises are active in this sector.

Even so, new technologies and innovations - electronic data interchange for example via the Internet - pose a challenge for wholesalers, as they facilitate direct relations between producers and other distributors and even directly to consumers. Furthermore, these new technologies reduce the so-called "lead-time" - the period between the preparation and the execution of an order, thereby streamlining production processes and reducing the need for large stocks. As a consequence, many wholesalers are seeking to respond to these threats by moving into the retail business and acquiring small independent traders. In short, wholesale enterprises have not missed the technological revolution, quite the opposite, they are directly affected by it and they are trying to adapt themselves to the new situation.

Following the NACE Rev. 1 statistical classification the Division of wholesale trade (Division 51) includes the "resale (sale without transformation) of new and used goods to retailers, to industrial, commercial, institutional or professional users; or to other wholesalers; or acting as agents in buying merchandise for, or selling merchandise to, such persons or companies: activities of wholesale merchants, jobbers, industrial distributors, exporters, importers, co-operative buying associations, merchandise and commodity brokers, commission merchants and agents and assemblers, buyers and co-operative associations engaged in the marketing of farm products". It also includes "the usual manipulations involved in wholesale such as assembling, sorting and grading of goods in large lots, break bulks, repacking and bottling, redistribution in smaller lots, e.g. pharmaceuticals; storage, refrigeration, delivery and installation of goods on own account".

However for statistical purposes, the NACE Rev. 1 Division of wholesale excludes the wholesale trade of motor vehicles, caravans and motorcycles, the wholesale of motor accessories and the renting and leasing of goods which are included elsewhere in the classification.

This Division is made up of the following statistical Groups:

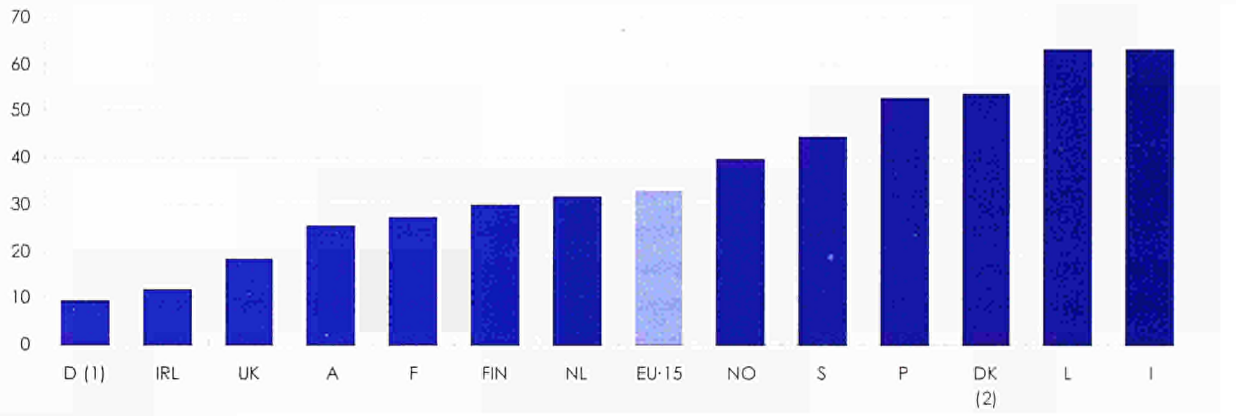
- 51.1: Wholesale on a fee or contract basis;
- 51.2: Wholesale of agricultural raw materials and live animals;
- 51.3: Wholesale of food, beverages and tobacco;
- 51.4: Wholesale of household goods;
- 51.5: Wholesale of non-agricultural intermediate products, waste and scrap;
- 51.6: Wholesale of machinery, equipment and supplies;
- 51.7: Other wholesale.

Wholesale trade in the European Economic Area

Approximately 1.2 million enterprises were registered in these activities in the EU in 1996 and they employed around 7 million persons. The importance of wholesale trade in distribution varied widely between countries. In employment terms the figure for Greece (estimate) and the United Kingdom (estimate) stood out, with 27% and 26% of distribution employment in wholesale trade. Most countries fell within the range of 30% to 40%, with only Sweden and Iceland (estimate) above this upper boundary. The EU average was 31.4% of employment. In turnover terms the importance of wholesale trade is much greater as would be expected (due to the nature of this type of distribution). The only countries where wholesale trade was not responsible for more than 50% of turnover in distribution were Greece (estimate) and Ireland.

The location of these enterprises was far from even across the EU. Italy and Luxembourg registered no less than 63 wholesale enterprises per 10,000 inhabitants. This was the highest density in the EU, the average being 33.1. Ireland recorded the lowest density (12.1 enterprises per 10,000 inhabitants), followed by the United Kingdom (18.7).

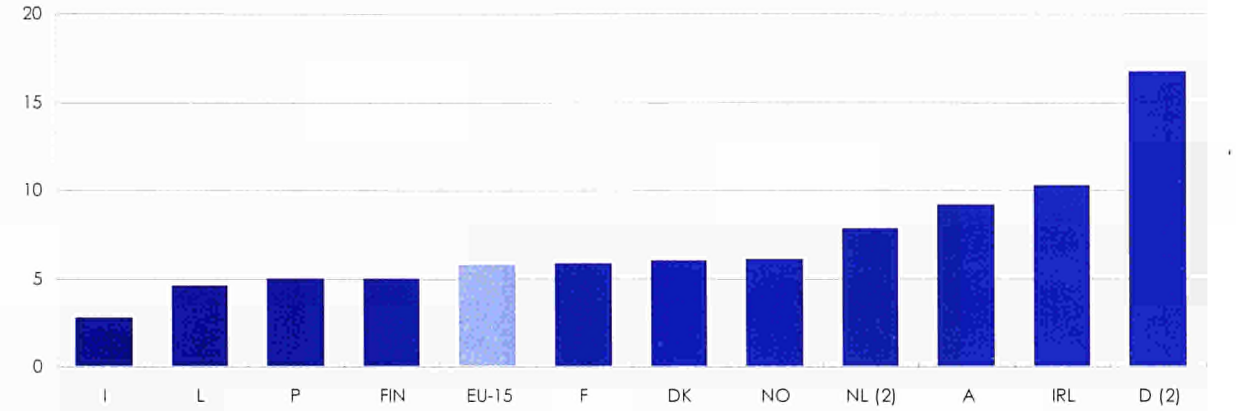
Figure 4.10: wholesale trade (NACE Rev. 1 Division 51)
Average number of enterprises per 10,000 inhabitants, 1996 — (units)



(1) Excluding NACE Rev. 1 51.1.
(2) 1995.

Source: SBS

Figure 4.11: wholesale trade (NACE Rev. 1 Division 51)
Average number of persons employed per enterprise, 1996 (1) — **(units)**



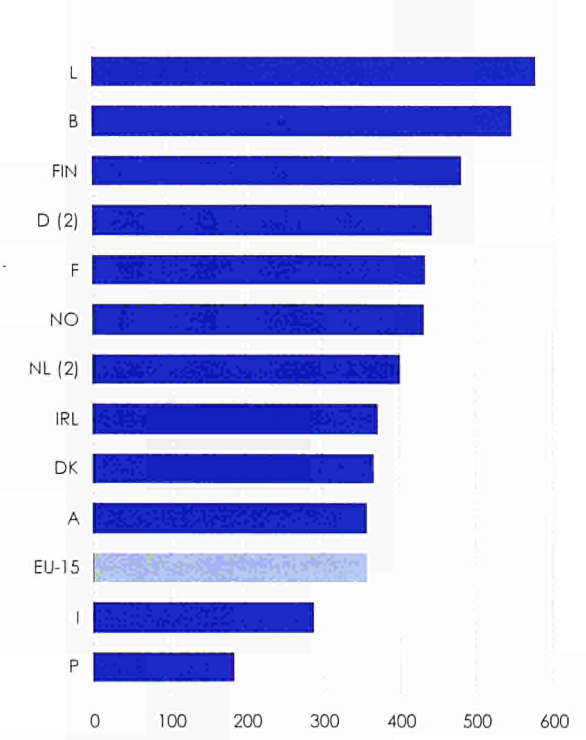
(1) D, FIN and IRL, 1997; DK and NL, 1995.
(2) Excluding NACE Rev. 1 51.1.

Source: SBS

Ranking countries by the absolute size of wholesale trade rather than relative size places Italy first in terms of the number of enterprises (as is the case in each of the three types of distribution). Spain (estimate) was second, followed by France and the United Kingdom. In employment terms Germany (estimate) was the largest with over 1.4 million persons employed and the United Kingdom also had more than 1.0 million persons employed in this Division. Germany (estimate), the United Kingdom and France were the three largest wholesale industries in turnover terms each recording more than 400 billion ECU of sales (Germany, 622 billion ECU).

The large number of enterprises in Italy and relatively low employment levels and turnover lead unsurprisingly to a small average size of enterprise in this country, regardless of the measure adopted. In 1996 each Italian enterprise (on average) employed 2.7 people. The largest enterprises were in Germany, which were almost 6 times larger than their Italian counterparts. In turnover terms, which may be a more appropriate measure for wholesale trade, Greek enterprises were the smallest with an average of 150 thousand ECU of turnover per enterprise (estimate). Italian enterprises were larger with 0.8 million ECU of turnover on average, whilst the largest were in Germany (estimate), the United Kingdom and Ireland.

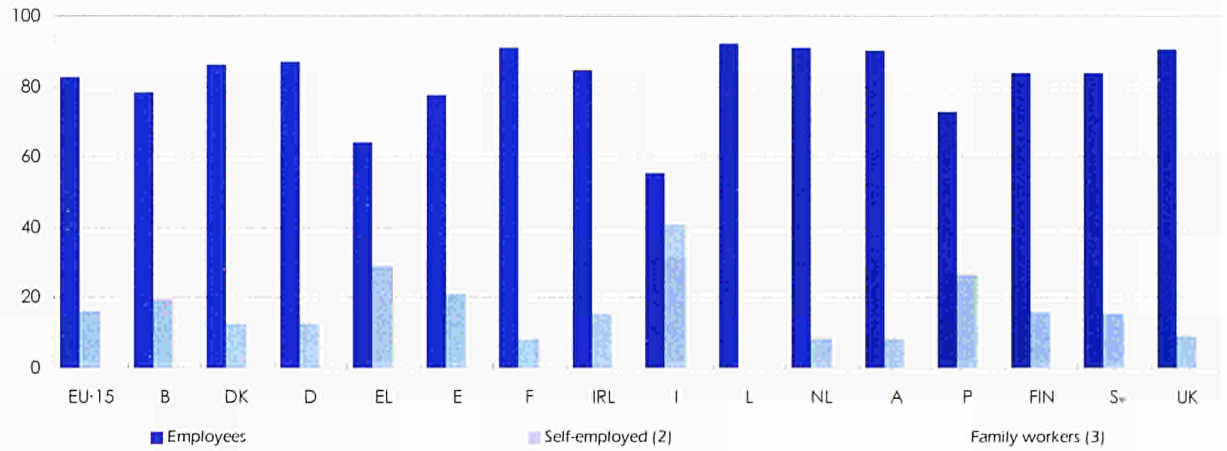
Figure 4.12: wholesale trade (NACE Rev. 1 Division 51)
Average turnover per person employed, 1996 (1) — **(thousand ECU)**



(1) D, FIN and IRL, 1997; DK and NL, 1995.
(2) Excluding NACE Rev. 1 51.1.

Source: SBS

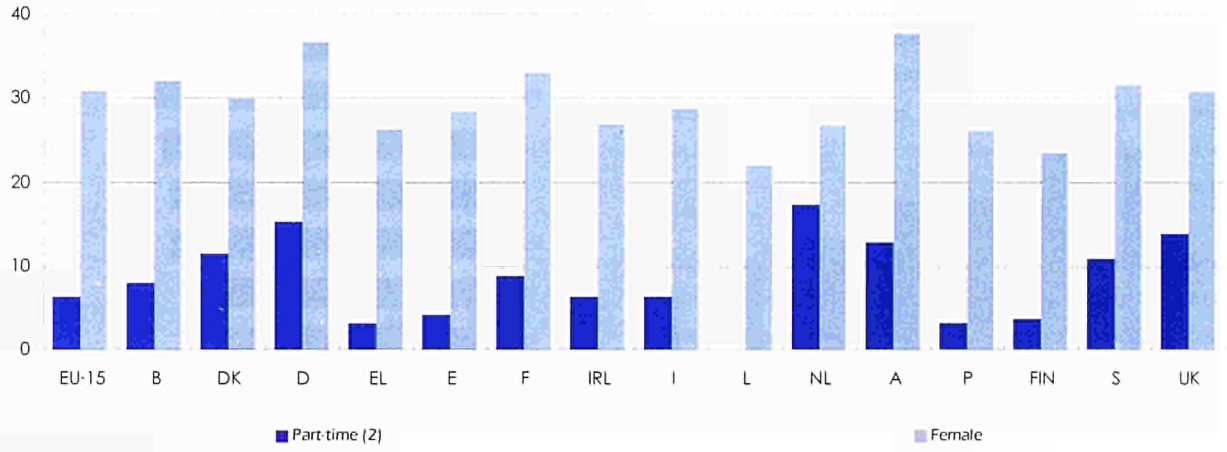
Figure 4.13: wholesale trade (NACE Rev. 1 Division 51)
Employment characteristics, 1997 (1) — **(% share of total employment)**



(1) Earlier years had to be used for some countries.
(2) L not available.
(3) EU-15, DK, L, P, FIN and S not available.

Source: LFS

Figure 4.14: wholesale trade (NACE Rev. 1 Division 51)
Part-time and female participation rates, 1998 (1) — **(% share of total employment)**



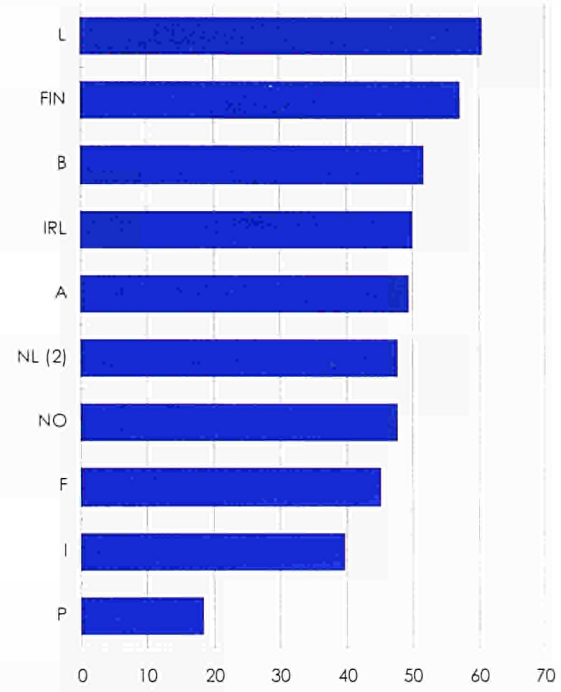
(1) EU-15 and IRL, 1997.
(2) L not available.

Source: LFS

Looking at the labour force the share of employees in persons employed was generally higher than the other two distribution activities. As in nearly all trade activities, the lowest share of employees in the workforce was in Italy, however wholesale trade was the only one of the three types of distribution where employees did account for more than half of the labour force in Italy.

Portugal recorded the lowest personnel costs with each employee costing on average 12.2 thousand ECU in 1996. This was con-

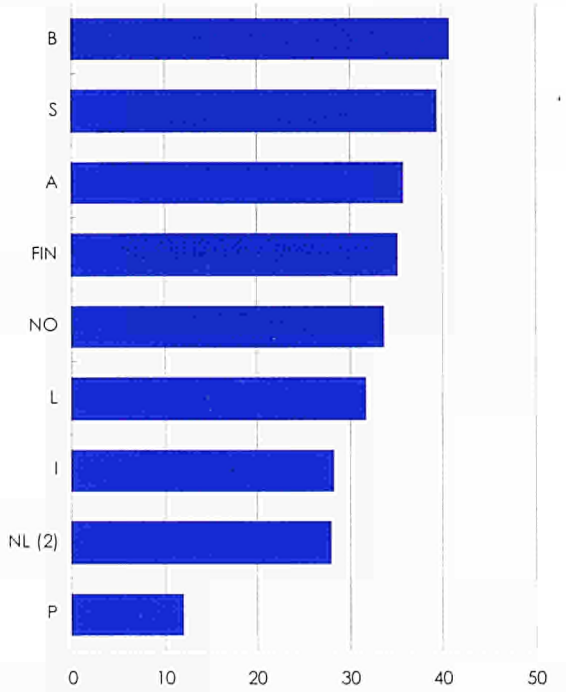
Figure 4.15: wholesale trade (NACE Rev. 1 Division 51)
Value added per person employed,
1996 (1) (thousand ECU)



(1) FIN and IRL, 1997; A and NL, 1995.
(2) Excluding NACE Rev. 1 51.1.

Source: SBS

Figure 4.16: wholesale trade (NACE Rev. 1 Division 51)
Personnel costs per employee,
1996 (1) (thousand ECU)



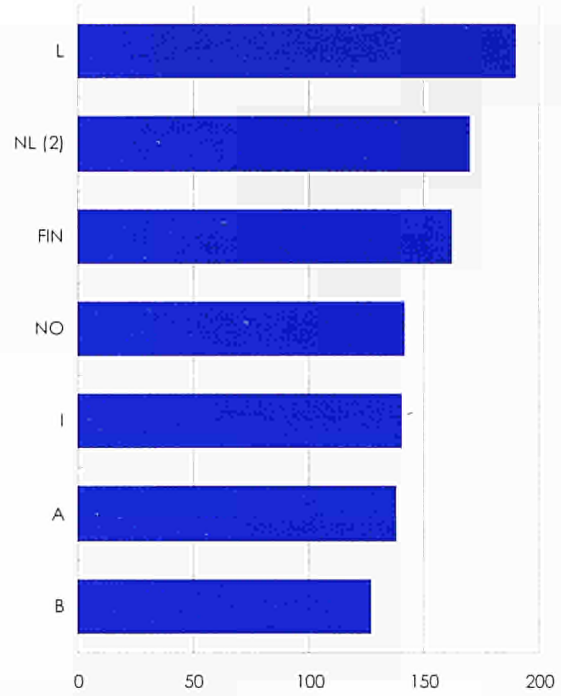
(1) FIN, 1997; A, NL and P, 1995.
(2) Excluding NACE Rev. 1 51.1.

Source: SBS

siderably lower than the next lowest country for which data was available, namely the Netherlands with 28.1 thousand ECU per person in 1995. In general personnel costs per employee were higher in wholesale trade than in either of the other two forms of distribution. The highest level recorded was in Belgium where average personnel costs were in excess of 40 thousand ECU per employee. Comparisons of these average costs between countries and activities need some care because of the different incidence of part-time employment.

The productivity of the labour force can be measured in a number of ways. One measure is to look at the value added per person employed which shows very high labour productivity levels for wholesale trade compared to the other two types of distribution. In all countries wholesale trade recorded more value added per person employed than either of the other forms of distribution and, in the case of Ireland in 1996, it was more than two and a half times higher than retail trade. The highest levels of productivity in wholesale trade were recorded in Luxembourg and Finland, which figured amongst the most productive in distribution as a whole. The lowest levels of labour productivity (using this measure) were found in Portugal, Ireland and France. This measure is however somewhat simplistic as it does not take account of the costs of the labour input and is strongly influenced by the role of part-time employment which varies greatly between countries. Wage adjusted labour productivity takes account of both of these problems to some extent. This measure still showed high productivity levels for Luxembourg and Finland in 1996, as well as for the Netherlands in 1995 (where we have already noted a relatively low level of unit personnel costs). Despite having the lowest productivity for the countries for which data is available, workers in wholesale trade in Belgium still generated 1.27 ECU of value added for every ECU of adjusted personnel costs. Notably this was higher than in the other distribution activities.

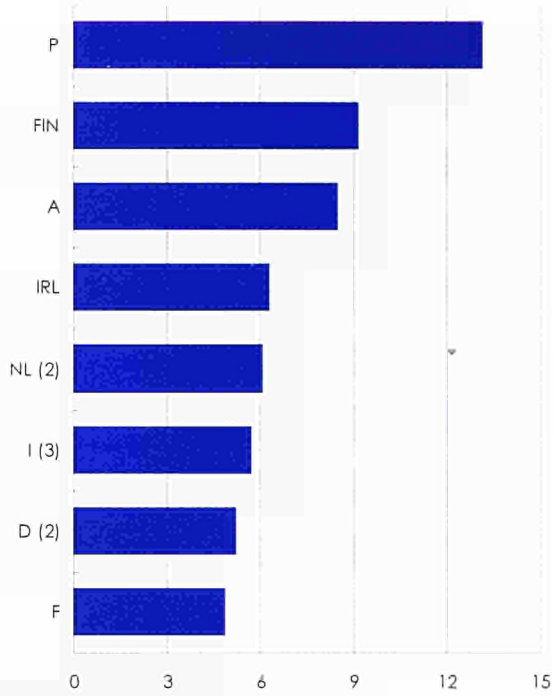
Figure 4.17: wholesale trade (NACE Rev. 1 Division 51)
Wage adjusted labour productivity,
1996 (1) (%)



(1) FIN, 1997; A and NL, 1995.
(2) Excluding NACE Rev. 1 51.1.

Source: SBS

Figure 4.18: wholesale trade (NACE Rev. 1 Division 51)
Gross investment per person employed,
1997 (1) (thousand ECU)



(1) F, 1996; A, I, NL and P, 1995.
(2) Excluding NACE Rev. 1 51.1.
(3) Excluding NACE Rev. 1 51.1, 51.25 and 51.65.

Source: SBS

The contribution of the various types of wholesale trade to the Division total show that wholesaling of machinery and equipment (NACE Rev. 1 Group 51.6) and of non-agricultural intermediate products (NACE Rev. 1 Group 51.5) were generally the most important in terms of employment and value added. However, this is not clear-cut and other wholesaling activities played an important role in particular countries. Agents involved in wholesaling on a fee or contract basis (NACE Rev. 1 Group 51.1) accounted for nearly 10% of Italian employment in distribution, whereas typically they only account for less than 3% in other countries. In Ireland wholesaling of food, beverages and tobacco (NACE Rev. 1 Group 51.3) employed more people than any of the other wholesaling activities and in Austria it was the wholesaling of household goods (NACE Rev. 1 Group 51.4) that took the largest share of employment in wholesale trade.

We will now examine in more detail the different statistical Groups within wholesale trade. As data exist only for a limited number of countries we cannot present any EU aggregates. In particular data on value added are scarce at the Group level and productivity measures cannot be calculated very often. The analysis therefore concentrates on indicators such as enterprise density and size measures such as the number of persons employed per enterprise and turnover per enterprise. These indicators can give us a picture of the structure of the sector.

Wholesale on a fee or contract basis

This Group includes all wholesale activities of commission agents, commodity brokers and all other wholesalers who trade on behalf and on the account of others and those activities consisting in bringing together sellers and buyers.

The density of enterprises in this Group was remarkably high in Italy, reaching 38.0 per 10,000 inhabitants which was nearly four times higher than second placed Luxembourg with 9.6 enterprises per 10,000 inhabitants. It should be noted, however, that it was only in this Group that Italy had the highest density amongst the countries for which data was available. Enterprise density was also above average in Finland, France and Austria with 7 wholesale agents per 10,000 inhabitants in each. Spain and Ireland had the lowest density, with 1 enterprise per 10,000 inhabitants.

Measured by average annual turnover the largest enterprises were in France with 1.2 million ECU per enterprise, followed by Sweden (1.1 million ECU), Luxembourg and Denmark (1995) with 0.9 million ECU each. Enterprises had the lowest average turnover in Italy, Austria and Finland. Inter-group comparisons show that these figures were generally much lower for wholesale on a fee or contract basis than for other wholesale Groups, which may be explained by the fact that agents in this activity record their commission as turnover and not their sales (as other wholesale activities).

The average size of enterprises measured by the number of persons employed per enterprise was very low across all countries when comparing with other wholesale activities. Figures ranged from 1.3 persons in Finland and Italy to 3.8 in Ireland. This supports the turnover data indicating that enterprises in this particular type of wholesale activity are very small.

The share of employees in the total number of persons employed indicates the degree to which the workforce is dependent upon working proprietors and family workers. There were great disparities in this measure between countries. In France the share was rather high with 94.3%, whereas in Italy it was exceptionally low (10.4%).

Wholesale of agricultural raw materials and live animals

The size of the enterprises in this statistical Group, as measured by the number of persons employed per enterprise was very heterogeneous across the Member States. The smallest agricultural wholesalers were in Italy, with an average of only 2.9 persons employed. In Luxembourg and Portugal they were also relatively small (3.8 persons employed per enterprise). Austria, in turn, had by far the largest wholesalers of this type, with 15.5 persons employed.

Analysing turnover per enterprise figures we arrive at similar results as for the employment size measure: Italy and Luxembourg seemed to have the smallest wholesalers with 1.5 and 1.8 million ECU turnover per enterprise respectively, along with Portugal (1.2 million ECU), whereas in France (5.4 million ECU), Austria (5.2 million ECU) and Germany (5.1 million ECU) wholesalers were relatively large.

The share of employees in total employment was low in Italy and Belgium, averaging 50.8% and 53.7% respectively. Denmark and Luxembourg had somewhat higher figures, with 74.8% (1995) and 75.8% respectively. In the remaining countries the share was over 80% with the highest proportion in the EU recorded in Austria (95.2%). Data for Norway showed an even higher proportion of employees in the workforce with 96.9%.

Compared to all other wholesale Groups, the density of enterprises was very low in most countries, and sometimes the lowest in wholesale trade. The Netherlands, Denmark and Luxembourg were the countries with a relatively high enterprise density with 3.5 (1995), 3.0 (1995) and 2.5 enterprises per 10,000 inhabitants. Density was lowest in the United Kingdom (0.6 enterprises) and Finland (0.3 enterprises).

Wholesale of food, beverages and tobacco

In almost all countries this was one of the most important wholesale Groups in terms of turnover. Additionally, the average size of enterprises, as measured by turnover per enterprise was in practically all countries one of the largest in wholesaling, along with the Group of wholesale of non-agricultural intermediate products, waste and scrap. Germany had by far the largest food wholesalers, with an average turnover of 9.9 million ECU per enterprise followed at some distance by Austria and Norway (7.8 million ECU), the Netherlands (6.4 million ECU, 1995) and Luxembourg (5.8 million ECU). As in other Groups, Italian and Portuguese food wholesalers were by far the smallest, recording respectively on average only 1.7 and 1.5 million ECU of turnover each. Denmark's food, beverage and tobacco enterprises, with 3.1 million ECU (1995) of turnover each on average, were also relatively small.

We can observe a similar pattern when comparing the number of persons employed per enterprise. In Austria and Germany this number was at its highest with 21.3 (1995) and 18.7 persons employed per wholesaler respectively. In turn, wholesalers in Italy (4.5), Denmark (5.9) and Finland (6.4) were the smallest with the lowest number of persons employed on average.

In most countries, the share of employees was rather high with over 90% of total employment. In France and Austria this share was particularly high with 98.1% and 96.8% (1995) respectively. In Belgium and Denmark the average was somewhat lower with 78.9% and 73.2% (both 1995) respectively, while in Italy the share was, as is practically always the case in wholesale trade, lowest (66.3%), due principally to the many small family-owned businesses.

Not surprisingly, with 6.4 enterprises per 10,000 inhabitants, the density of wholesale enterprises in Italy was one of the highest. Interestingly though, density was higher in both Denmark and Luxembourg, with 7.6 (1995) and 7.3 enterprises per 10,000 inhabitants. In Germany, enterprise density was the lowest in this wholesale activity with only 1.6 enterprises per 10,000 inhabitants.

Wholesale of household goods

This Group includes the wholesale of textiles, clothing and footwear, electrical household appliances, china and glassware, perfume and cosmetics, pharmaceutical goods and furniture.

Average turnover per enterprise within the wholesale of household goods was again highest in Germany (5.1 million ECU) followed by Ireland and Austria with 3.6 and 3.4 (1995) million ECU each. Notably, the smallest average size of wholesalers of household goods was not to be found in Italy, but in Denmark, Sweden, Finland, Luxembourg and Portugal, whose enterprises generated on average between 1.2 and 1.5 million ECU of turnover respectively.

When ranking the average number of persons employed per wholesale enterprise in the different countries, we find exactly the same pattern at the top as for turnover per enterprise. Germany's wholesalers had the largest average workforce employing 15 persons per enterprise on average, followed by Ireland (11.3) and Austria (11.0, 1995), whereas Luxembourg (3.8) and Finland (4.1) had the smallest.

The ratio of employees to total employment was fairly typical, as for wholesale trade as a whole with the only exception being Italy where there were relatively more employees in the workforce in this activity than the average for all wholesaling activities. Again, wholesalers in France had a very high share of employees to total employment, exceeding 98% and it is worth noting that this ratio exceeded 90% in France in every wholesale Group. In this activity France was followed by wholesalers in Austria and Ireland with 95.9% (1995) and 94.3% respectively. Italy (75.1%) and Denmark (74.3%, 1995) recorded the lowest shares.

Wholesale of non-agricultural intermediate products, waste and scrap

This Group includes the wholesaling of important items such as fuels, metals, wood, construction materials and chemical products, among others. In terms of total turnover it is the most important wholesale Group. To illustrate this, in Germany, total turnover amounted to 186.9 billion ECU in 1997, compared to a turnover of 119.4 billion ECU in the next largest wholesale Group, wholesale trade of food, beverages and tobacco.

Average turnover per enterprise was also comparatively high. According to this measure the United Kingdom had the largest wholesalers, with an average annual turnover of 10.9 million ECU in 1996. Germany's wholesalers were second largest with 10.3 million ECU per enterprise. Portugal had by far the smallest enterprises (1.6 million ECU), followed by Sweden (2.4 million ECU).

Generally, the number of persons employed per enterprise was fairly high when compared to other Groups. This confirms the indications provided by the turnover size measure. Using employment, Germany had the largest enterprises, with an average of 19.4 persons employed per enterprise, followed by Austria (14.4, 1995), Ireland (13.1) and France (11.1). Wholesalers in Italy presented again the lowest figure with an average of 5.4.

The proportion of employees in total employment were particularly high in this Group. Of the eleven countries for which data are available, eight had a share of 90% or more. Even though Italy had again the lowest share with 72.5%, it was still the second highest share of any wholesaling Group in Italy. It is also noteworthy that in France practically all persons employed were employees (99.0%). These results indicate a much greater role in this Group for employees than in other areas of wholesaling.

Wholesale of machinery, equipment and supplies

Germany, the Netherlands and the United Kingdom clearly had the largest wholesalers of machinery and equipment, averaging 4.3, 4.2 and 5.2 million ECU of turnover each respectively. The average turnover of Irish wholesalers in this activity amounted to 3.6 million ECU each. In a number of countries - Italy, Portugal, Luxembourg, Sweden and Norway - average turnover was below 2 million ECU per enterprise.

The other measure of enterprise size, the number of persons employed per enterprise, followed broadly the same lines. Wholesalers in Germany were largest with an average of 14.3 persons employed (no data are available for the United Kingdom). Enterprises in Luxembourg and Italy had on average the fewest number of persons employed, with 5.2 and 5.8 respectively.

Again, the ratio of employees to total employment was very high. Wholesalers of machinery and equipment in eight out of the eleven countries for which data was available had a ratio of more than 90% and six had a ratio above 95%. Once more enterprises in Italy had by far the largest share of working proprietors and family workers without a fixed wage or salary, with employees accounting for 75.8%.

Other wholesale

This residual Group includes all specialised wholesale not covered in one of the previous categories as well as wholesale of a variety of goods without any particular specialisation.

When analysing the size structure of wholesalers in this Group, Germany stands out clearly from the rest of the countries, whether we measure size by the number of persons employed per enterprise or by turnover per enterprise. Indeed, Germany's wholesalers in this Group were comparatively very large, averaging 50.3 persons employed. Second, at a considerable distance, were wholesalers in Finland with an average of 15.6 persons employed. These two countries were the only countries averaging a workforce of more than 10 persons employed. France had an average employment per enterprise in this activity of only 1.1 persons.

When studying turnover per enterprise figures, the gap between Germany and the other Member States was equally evident. Germany's and Finland's wholesalers in this activity made an annual average turnover of 24.8 million ECU and 14.5 million ECU respectively. Next were Austrian wholesalers generating an average of 3.0 million ECU of turnover (1995) and in France turnover turned out to be as low as 417.7 thousand ECU per enterprise.

Finland had the highest share of employees in total employment in this Group (98.4%), followed by Austria (92.8%, 1995) and France (92.0%). Luxembourg exceptionally had the lowest share (65.4%) slightly below that of Italy.

Wholesale trade in the USA

In 1997 the wholesale trade activity in the USA recorded a 4.1% annual increase in total sales, down from 6.0% in 1996 and 9.2% in 1995. Total sales were over one and a half times greater than those of the retail sector in 1997. The number of paid employees amounted to 5.8 million in 1997 which was equivalent to only 41.0% of employment in retail trade. There were 453 thousand establishments active in this form of trade, about 40% of the equivalent figure for retail distribution.

Wholesale trade in Japan

After experiencing an increase in average employment per enterprise in the early nineties, from 242 employees in 1991 to 249 in 1994, the average number of employees per wholesale enterprise in Japan decreased in 1995 and 1996 to 236[1]. It is also worth noting that the ratio of part-time employment increased from 7.5% of the wholesale labour force in 1991 to 9.1% in 1996.

Sales figures for wholesale trade in Japan dropped by 1.2% from 1995 to 1996, but value added increased by 0.9%, with labour productivity subsequently rising by 4.5% during the same period (as measured by value added per person employed).

(1) Annual data refer to fiscal years, source: MITI.

NACE Rev. 1 Group 51.1: WHOLESALE ON A FEE OR CONTRACT BASIS

Table 4.21
Turnover characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Turnover (billion ECU)	3.4	1.9	:	:	:	45.8	0.1	15.8	0.4	:	0.6	4.0	0.6	3.2	9.2	0.4
Turnover/enterprise (million ECU)	:	0.9	:	:	:	1.2	0.2	0.1	0.9	:	0.1	0.2	0.2	1.1	0.7	0.2
Turnover/person employed (thousand ECU)	209	331	:	:	:	764	53	56	573	:	77	107	124	:	:	111
Turnover, share in NACE Rev. 1.51 (%)	2.9	3.1	:	:	:	11.2	0.5	5.5	5.2	:	0.8	8.4	1.6	4.0	2.2	0.9

(1) IRL and FIN, 1997; DK and A, 1995.

Table 4.22
Main indicators as a share of turnover, 1996 (1) (%)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Production value	:	:	:	:	:	21.6	:	:	25.5	:	88.7	64.6	79.6	:	:	79.8
Value added at factor cost	16.7	:	:	:	:	6.6	60.1	44.9	11.4	:	50.8	12.0	42.6	13.6	:	29.1
Personnel costs	7.2	:	:	:	:	:	:	5.0	4.6	:	24.6	:	21.0	9.2	9.7	18.2
Gross operating surplus	9.5	:	:	:	:	1.8	:	40.0	6.8	:	26.2	5.6	21.6	4.5	:	10.9
Gross investment in tangible goods	:	:	:	:	:	0.7	2.0	7.8	:	:	3.7	:	4.1	2.2	1.8	:

(1) IRL and FIN, 1997; A, 1995.

Table 4.23
Enterprise and employment characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Number of enterprises (thousands)	:	2.2	:	:	:	39.3	0.5	222.8	0.4	4.8	5.2	18.6	3.9	3.1	12.8	2.0
Number of persons employed (thousands)	16.2	5.9	:	:	:	60.0	1.9	279.8	0.6	:	7.8	37.3	5.1	:	:	3.8
Number of persons employed/enterprise (units)	:	2.6	:	:	:	1.5	3.8	1.3	1.6	:	1.8	2.0	1.3	:	:	1.9
Employees/persons employed (%)	33.9	62.9	:	:	:	94.3	69.4	10.4	57.8	:	50.3	58.1	73.0	:	:	74.4
Personnel costs/employee (thousand ECU)	44.6	:	:	:	:	:	:	27.0	45.8	:	37.7	:	35.8	38.9	:	27.2
Wages and salaries/personnel costs (%)	77.7	:	:	:	:	:	:	66.9	:	:	79.5	:	79.1	69.7	87.7	81.9
Persons employed, share in NACE Rev. 1.51 (%)	7.5	3.5	:	:	:	6.4	3.8	28.2	5.3	:	4.0	14.4	6.4	:	:	3.6

(1) IRL and FIN, 1997; DK and A, 1995.

Table 4.24
Productivity/competitiveness characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Value added at factor cost (million ECU)	567	:	:	:	:	3,043	61	7,100	42	:	306	481	270	441	:	124
Value added/person employed (thousand ECU)	35.1	:	:	:	:	50.7	31.6	25.4	65.2	:	39.1	12.9	53.0	:	:	32.4
Gross op. surplus/pers. employed (thousand ECU)	20.0	:	:	:	:	13.7	:	22.6	38.7	:	20.2	6.0	26.8	:	:	12.2
Gross investment/pers. employed (thousand ECU)	:	:	:	:	:	5.4	1.0	4.4	:	:	2.9	:	5.2	:	:	:
Wage adjusted labour productivity (%)	78.6	:	:	:	:	:	:	94.1	142.2	:	103.9	:	148.0	:	:	119.2

(1) IRL and FIN, 1997; A, 1995.

Source: SBS

NACE Rev. 1 Group 51.2: WHOLESALE OF AGRICULTURAL RAW MATERIALS AND LIVE ANIMALS

Table 4.25
Turnover characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Turnover (billion ECU)	5.6	5.3	34.1	:	:	44.8	0.9	13.2	0.2	21.1	5.9	3.0	0.8	2.9	8.9	2.5
Turnover/enterprise (million ECU)	:	3.4	5.1	:	:	5.4	4.3	1.5	1.8	4.4	5.2	1.2	2.5	3.4	4.8	6.1
Turnover/person employed (thousand ECU)	791	501	656	:	:	824	526	522	487	631	336	314	504	:	:	503
Turnover, share in NACE Rev. 1 51 (%)	4.7	8.5	:	:	:	10.9	4.5	4.6	2.7	:	8.3	6.3	2.0	3.7	2.1	5.4

(1) D, IRL and FIN, 1997; DK and A, 1995; NL, turnover 1997; NL, turnover/person employed, 1995.

Table 4.26
Main indicators as a share of turnover, 1996 (1) (%)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Production value	:	:	:	:	:	18.3	20.2	:	16.2	11.9	20.0	:	15.7	:	:	52.3
Value added at factor cost	4.8	:	:	:	:	5.4	12.4	7.3	9.6	6.5	12.1	4.5	9.4	8.4	:	10.6
Personnel costs	2.2	:	:	:	:	:	:	2.5	4.5	3.7	7.8	:	5.6	6.9	2.9	6.4
Gross operating surplus	2.6	:	:	:	:	1.7	:	4.8	5.1	2.9	4.2	2.1	3.8	1.5	:	4.1
Gross investment in tangible goods	:	:	1.0	:	:	0.9	1.9	1.2	:	1.4	1.8	:	0.9	1.6	0.7	:

(1) D, IRL, NL and FIN, 1997; A, 1995.

Table 4.27
Enterprise and employment characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Number of enterprises (thousands)	:	1.6	6.7	:	:	8.2	0.2	8.7	0.1	4.4	1.1	2.5	0.3	0.9	1.9	0.4
Number of persons employed (thousands)	7.0	10.5	52.0	:	:	54.4	1.6	25.4	0.4	33.5	17.5	9.6	1.6	:	:	5.0
Number of persons employed/enterprise (units)	:	6.8	7.8	:	:	6.6	8.1	2.9	3.8	6.2	15.5	3.8	5.0	:	:	12.1
Employees/persons employed (%)	53.7	74.8	:	:	:	94.5	87.8	50.8	75.8	89.2	95.2	80.3	91.4	:	:	96.9
Personnel costs/employee (thousand ECU)	32.4	:	:	:	:	:	:	25.8	29.2	25.1	27.6	:	30.9	34.0	:	33.5
Wages and salaries/personnel costs (%)	76.2	:	:	:	:	:	:	66.7	:	86.9	77.2	:	75.5	68.8	87.6	81.3
Persons employed, share in NACE Rev. 1 51 (%)	3.3	6.2	:	:	:	5.8	3.2	2.6	3.3	:	9.0	3.7	2.0	:	:	4.7

(1) D, IRL and FIN, 1997; DK and A, 1995; NL, 1995 (except wages and salaries/personnel costs, 1997).

Table 4.28
Productivity/competitiveness characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Value added at factor cost (million ECU)	267	:	:	:	:	2,437	105	971	19	1,381	708	136	73	247	:	266
Value added/person employed (thousand ECU)	37.9	:	:	:	:	44.8	65.2	38.2	46.9	44.0	40.6	14.1	47.3	:	:	53.2
Gross op. surplus/pers. employed (thousand ECU)	20.5	:	:	:	:	13.6	:	25.1	24.8	21.6	14.3	6.5	19.1	:	:	20.7
Gross investment/pers. employed (thousand ECU)	:	:	6.3	:	:	7.8	9.8	6.5	:	5.0	5.9	:	4.6	:	:	:
Wage adjusted labour productivity (%)	116.9	:	:	:	:	:	:	148.0	160.9	175.4	147.0	:	153.2	:	:	158.7

(1) D, IRL and FIN, 1997; A, 1995; NL, 1995 (except value added at factor cost, 1997).

Source: SBS

NACE Rev. 1 Group 51.3: WHOLESALE OF FOOD, BEVERAGES AND TOBACCO

Table 4.29
Turnover characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Turnover (billion ECU)	21.7	11.8	119.4	:	:	93.3	5.5	63.5	1.8	37.4	13.1	11.3	4.8	14.9	73.8	12.8
Turnover/enterprise (million ECU)	:	3.1	9.9	:	:	4.5	5.4	1.7	5.8	6.4	7.8	1.5	4.2	4.2	4.9	7.8
Turnover/person employed (thousand ECU)	589	529	529	:	:	530	495	381	647	541	369	204	695	:	:	802
Turnover, share in NACE Rev. 1 51 (%)	18.3	19.1	:	:	:	22.8	29.2	22.2	25.9	:	18.5	23.5	12.3	18.6	17.5	27.5

(1) D, IRL and FIN, 1997; DK and A, 1995; NL, turnover 1997; NL, turnover/person employed, 1995.

Table 4.30
Main indicators as a share of turnover, 1996 (1) (%)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Production value	:	:	:	:	:	27.1	14.4	:	12.4	13.0	27.3	:	14.7	:	:	17.5
Value added at factor cost	6.9	:	:	:	:	7.6	8.9	8.9	8.2	7.5	10.3	6.4	7.4	6.6	:	5.8
Personnel costs	4.2	:	:	:	:	:	:	4.3	3.8	4.1	7.9	:	4.2	5.0	4.3	3.8
Gross operating surplus	2.6	:	:	:	:	1.9	:	4.5	4.4	3.4	2.4	1.8	3.2	1.6	:	2.0
Gross investment in tangible goods	:	:	0.9	:	:	0.9	1.2	1.7	:	1.5	2.4	:	1.1	0.9	1.0	:

(1) D, IRL, NL and FIN, 1997; I and A, 1995.

Table 4.31
Enterprise and employment characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Number of enterprises (thousands)	:	3.8	12.1	:	:	20.8	1.0	36.6	0.3	5.7	1.8	7.6	1.1	3.5	14.9	1.6
Number of persons employed (thousands)	36.8	22.4	225.7	:	:	176.1	11.0	166.7	2.8	66.7	35.6	55.3	6.8	:	:	15.9
Number of persons employed/enterprise (units)	:	5.9	18.7	:	:	8.5	10.9	4.6	9.0	11.2	21.3	7.3	6.1	:	:	9.7
Employees/persons employed (%)	78.9	73.2	:	:	:	98.1	92.9	66.3	92.8	89.3	96.8	93.8	94.9	:	:	96.9
Personnel costs/employee (thousand ECU)	31.5	:	:	:	:	:	:	25.0	26.7	25.4	29.9	:	30.4	36.4	:	31.4
Wages and salaries/personnel costs (%)	74.5	:	:	:	:	:	:	66.4	:	87.1	77.4	:	76.8	69.4	88.4	82.9
Persons employed, share in NACE Rev. 1 51 (%)	17.0	13.2	:	:	:	18.7	22.0	16.8	23.2	:	18.3	21.3	8.6	:	:	14.8

(1) D, IRL and FIN, 1997; DK and A, 1995; NL, 1995 (except wages and salaries/personnel costs, 1997).

Table 4.32
Productivity/competitiveness characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Value added at factor cost (million ECU)	1,489	:	:	:	:	7,118	485	5,623	150	2,799	1,351	720	351	989	:	746
Value added/person employed (thousand ECU)	40.4	:	:	:	:	40.4	43.9	33.7	53.3	41.8	38.0	13.0	51.3	:	:	46.8
Gross op. surplus/pers. employed (thousand ECU)	15.6	:	:	:	:	10.0	:	17.2	28.5	19.1	9.0	3.7	22.5	:	:	16.4
Gross investment/pers. employed (thousand ECU)	:	:	4.8	:	:	4.8	5.9	5.7	:	6.7	8.9	:	7.9	:	:	:
Wage adjusted labour productivity (%)	128.5	:	:	:	:	:	:	135.1	199.8	164.7	126.8	:	168.9	:	:	149.1

(1) D, IRL and FIN, 1997; I and A, 1995; NL, 1995 (except value added at factor cost, 1997).

Source: SBS

NACE Rev. 1 Group 51.4: WHOLESALE OF HOUSEHOLD GOODS

Table 4.33
Turnover characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Turnover (billion ECU)	23.1	11.5	114.6	:	:	66.9	3.1	71.7	0.7	35.0	14.5	11.7	5.2	16.0	62.3	7.6
Turnover/enterprise (million ECU)	:	1.5	5.1	:	:	1.9	3.6	1.6	1.4	2.3	3.4	1.2	1.4	1.4	2.5	1.9
Turnover/person employed (thousand ECU)	398	339	341	:	:	365	319	297	373	300	307	174	349	:	:	352
Turnover, share in NACE Rev. 1 51 (%)	19.5	18.5	:	:	:	16.3	16.4	25.0	10.1	:	20.3	24.4	13.5	20.1	14.7	16.3

(1) D, IRL and FIN, 1997; DK and A, 1995; NL, turnover 1997; NL, turnover/person employed, 1995.

Table 4.34
Main indicators as a share of turnover, 1996 (1) (%)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Production value	:	:	:	:	:	30.9	26.6	:	25.3	27.0	31.1	:	28.3	:	:	30.4
Value added at factor cost	13.0	:	:	:	:	12.5	16.6	14.8	15.5	13.5	16.8	11.6	15.7	13.9	:	13.3
Personnel costs	8.2	:	:	:	:	:	:	6.3	6.8	7.1	11.5	:	8.8	9.2	7.0	8.6
Gross operating surplus	4.8	:	:	:	:	3.1	.	8.4	8.7	6.4	5.3	4.8	6.8	4.7	:	4.7
Gross investment in tangible goods	:	:	0.9	:	:	0.9	1.5	2.2	:	1.6	1.7	:	1.4	1.5	1.2	:

(1) D, IRL, NL and FIN, 1997; A, 1995.

Table 4.35
Enterprise and employment characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Number of enterprises (thousands)	:	7.8	22.4	:	:	35.6	0.9	45.1	0.5	13.2	4.6	9.9	3.6	11.2	25.4	4.1
Number of persons employed (thousands)	58.0	33.8	336.4	:	:	183.5	9.6	241.8	1.9	94.1	47.2	66.8	14.9	:	:	21.6
Number of persons employed/enterprise (units)	:	4.3	15.0	:	:	5.2	11.3	5.4	3.8	6.2	11.0	6.7	4.1	:	:	5.3
Employees/persons employed (%)	80.9	74.3	:	:	:	98.2	94.3	75.1	82.5	89.8	95.9	93.3	91.6	:	:	94.0
Personnel costs/employee (thousand ECU)	40.4	:	:	:	:	:	:	25.0	30.9	26.6	36.8	:	33.7	38.7	:	32.2
Wages and salaries/personnel costs (%)	75.0	:	:	:	:	:	:	66.7	:	87.1	78.0	:	78.3	69.4	88.2	81.6
Persons employed, share in NACE Rev. 1 51 (%)	26.8	20.0	:	:	:	19.5	19.2	24.4	15.6	:	24.2	25.7	18.7	:	:	20.1

(1) D, IRL and FIN, 1997; DK and A, 1995; NL, 1995 (except wages and salaries/personnel costs, 1997).

Table 4.36
Productivity/competitiveness characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Value added at factor cost (million ECU)	3,011	:	:	:	:	8,389	508	10,580	110	4,703	2,432	1,357	813	2,230	:	1,007
Value added/person employed (thousand ECU)	52.0	:	:	:	:	45.7	52.8	43.8	57.9	43.3	51.6	20.3	54.7	:	:	46.7
Gross op. surplus/pers. employed (thousand ECU)	19.2	:	:	:	:	11.4	:	24.9	32.4	19.4	16.3	8.5	23.9	:	:	16.5
Gross investment/pers. employed (thousand ECU)	:	:	3.1	:	:	3.3	4.8	6.5	:	5.0	5.1	:	5.0	:	:	:
Wage adjusted labour productivity (%)	128.5	:	:	:	:	:	:	174.7	187.3	162.8	140.1	:	162.6	:	:	145.2

(1) D, IRL and FIN, 1997; A, 1995; NL, 1995 (except value added at factor cost, 1997).

Source: SBS

NACE Rev. 1 Group 51.5: WHOLESALE OF NON-AGRICULTURAL INTERMEDIATE PRODUCTS, WASTE AND SCRAP

Table 4.37
Turnover characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Turnover (billion ECU)	45.9	17.1	186.9	:	:	82.9	5.3	87.2	2.7	36.9	23.2	10.0	10.3	24.9	167.1	12.0
Turnover/enterprise (million ECU)	:	4.1	10.3	:	:	4.7	6.9	3.1	5.6	5.0	7.8	1.6	3.9	2.4	10.9	4.4
Turnover/person employed (thousand ECU)	1,055	458	528	:	:	425	527	566	951	458	538	255	630	:	:	559
Turnover, share in NACE Rev. 1.51 (%)	38.7	27.6	:	:	:	20.2	28.2	30.4	37.9	:	32.7	21.0	26.9	31.1	39.6	25.8

(1) D, IRL and FIN, 1997; DK and A, 1995; NL, turnover 1997; NL, turnover/person employed, 1995.

Table 4.38
Main indicators as a share of turnover, 1996 (1) (%)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Production value	:	:	:	:	:	25.1	18.5	:	14.0	18.3	25.8	:	16.2	:	:	39.9
Value added at factor cost	5.8	:	:	:	:	10.6	11.2	9.9	8.5	11.5	10.6	9.6	10.1	11.6	:	9.6
Personnel costs	3.4	:	:	:	:	:	:	4.0	3.0	6.4	6.6	:	5.1	6.9	2.9	5.9
Gross operating surplus	2.4	:	:	:	:	2.5	:	5.9	5.4	5.1	4.1	4.7	4.9	4.7	:	3.7
Gross investment in tangible goods	:	:	1.5	:	:	1.2	2.4	1.8	:	1.5	1.8	:	3.0	1.7	0.8	:

(1) D, IRL, NL and FIN, 1997; A, 1995.

Table 4.39
Enterprise and employment characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Number of enterprises (thousands)	:	4.2	18.2	:	:	17.5	0.8	28.3	0.5	7.1	3.2	6.5	2.6	10.6	15.4	2.8
Number of persons employed (thousands)	43.5	37.4	354.0	:	:	195.2	10.0	154.0	2.8	78.6	43.1	39.4	16.4	:	:	21.5
Number of persons employed/enterprise (units)	:	8.9	19.4	:	:	11.1	13.1	5.4	5.9	9.3	14.4	6.1	6.2	:	:	7.8
Employees/persons employed (%)	83.6	79.1	:	:	:	99.0	94.8	72.5	90.0	94.4	97.0	92.9	94.3	:	:	96.4
Personnel costs/employee (thousand ECU)	42.3	:	:	:	:	:	:	30.9	31.7	28.9	36.4	:	34.4	38.8	:	34.2
Wages and salaries/personnel costs (%)	72.9	:	:	:	:	:	:	66.8	:	86.0	77.4	:	78.3	69.1	86.9	81.3
Persons employed, share in NACE Rev. 1.51 (%)	20.1	22.1	:	:	:	20.7	20.0	15.5	23.1	:	22.2	15.2	20.6	:	:	20.0

(1) D, IRL and FIN, 1997; DK and A, 1995; NL, 1995 (except wages and salaries/personnel costs, 1997).

Table 4.40
Productivity/competitiveness characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Value added at factor cost (million ECU)	2,655	:	:	:	:	8,765	592	8,612	225	4,248	2,469	965	1,042	2,885	:	1,156
Value added/person employed (thousand ECU)	61.0	:	:	:	:	44.9	59.2	55.9	80.4	52.5	57.2	24.5	63.5	:	:	53.8
Gross op. surplus/pers. employed (thousand ECU)	25.7	:	:	:	:	10.5	:	33.5	51.8	25.2	21.9	12.0	31.0	:	:	20.8
Gross investment/pers. employed (thousand ECU)	:	:	8.0	:	:	5.2	12.5	10.0	:	8.1	9.4	:	18.6	:	:	:
Wage adjusted labour productivity (%)	144.2	:	:	:	:	:	:	181.2	253.2	181.5	157.0	:	184.5	:	:	157.1

(1) D, IRL and FIN, 1997; A, 1995; NL, 1995 (except value added at factor cost, 1997).

Source: SBS

NACE Rev. 1 Group 51.6: WHOLESALE OF MACHINERY, EQUIPMENT AND SUPPLIES

Table 4.41
Turnover characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Turnover (billion ECU)	16.3	13.0	60.5	:	:	73.6	2.9	21.7	1.1	47.3	11.6	5.1	9.6	17.7	61.2	10.5
Turnover/enterprise (million ECU)	:	2.0	4.3	:	:	2.1	3.6	1.5	1.8	4.2	3.0	1.2	2.4	1.8	5.2	1.9
Turnover/person employed (thousand ECU)	344	245	304	:	:	275	267	259	345	314	288	147	355	:	:	290
Turnover, share in NACE Rev. 1.51 (%)	13.7	21.0	:	:	:	18.0	15.7	7.6	15.6	:	16.3	10.6	25.0	22.1	14.5	22.5

(1) D, IRL and FIN, 1997; DK and A, 1995; NL, turnover 1997; NL, turnover/person employed, 1995.

Table 4.42
Main indicators as a share of turnover, 1996 (1) (%)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Production value	:	:	:	:	:	34.3	28.2	:	25.9	22.5	32.6	:	25.9	:	:	31.2
Value added at factor cost	18.1	:	:	:	:	17.2	19.2	20.8	15.6	13.9	19.4	16.5	16.6	17.1	:	16.5
Personnel costs	12.2	:	:	:	:	:	:	11.0	9.3	8.1	14.2	:	10.5	11.9	9.8	12.1
Gross operating surplus	5.9	:	:	:	:	3.3	:	9.8	6.3	5.8	5.2	6.7	6.1	5.2	:	4.4
Gross investment in tangible goods	:	:	1.4	:	:	1.8	1.4	2.1	:	1.4	2.3	:	2.0	2.5	1.9	:

(1) D, IRL, NL and FIN, 1997; A, 1995.

Table 4.43
Enterprise and employment characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Number of enterprises (thousands)	:	6.7	13.9	:	:	34.4	0.8	14.4	0.6	10.3	4.2	4.3	3.9	10.0	11.8	5.5
Number of persons employed (thousands)	47.4	53.2	198.8	:	:	267.6	11.0	83.8	3.2	114.2	40.1	34.3	27.1	:	:	36.1
Number of persons employed/enterprise (units)	:	8.0	14.3	:	:	7.8	13.6	5.8	5.2	9.3	10.3	8.1	6.9	:	:	6.5
Employees/persons employed (%)	87.3	83.7	:	:	:	98.7	94.1	75.8	90.0	95.3	95.7	96.9	95.7	:	:	96.1
Personnel costs/employee (thousand ECU)	47.9	:	:	:	:	:	:	37.7	35.6	32.0	42.9	:	39.0	42.8	:	36.4
Wages and salaries/personnel costs (%)	75.3	:	:	:	:	:	:	66.4	:	87.7	78.0	:	78.4	69.8	87.7	82.1
Persons employed, share in NACE Rev. 1.51 (%)	21.9	31.5	:	:	:	28.4	22.0	8.4	26.2	:	20.6	13.2	34.1	:	:	33.7

(1) D, IRL and FIN, 1997; DK and A, 1995; NL, 1995 (except wages and salaries/personnel costs, 1997).

Table 4.44
Productivity/competitiveness characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Value added at factor cost (million ECU)	2,953	:	:	:	:	12,695	565	4,524	171	6,571	2,244	835	1,603	3,022	:	1,726
Value added/person employed (thousand ECU)	62.3	:	:	:	:	47.4	51.2	54.0	53.8	52.4	56.0	24.3	59.1	:	:	47.8
Gross op. surplus/pers. employed (thousand ECU)	20.4	:	:	:	:	8.9	:	25.4	21.8	21.9	15.0	9.9	21.8	:	:	12.7
Gross investment/pers. employed (thousand ECU)	:	:	4.2	:	:	5.0	3.8	5.4	:	5.8	6.5	:	7.3	:	:	:
Wage adjusted labour productivity (%)	129.9	:	:	:	:	:	:	143.1	151.3	163.8	130.7	:	151.6	:	:	131.1

(1) D, IRL and FIN, 1997; A, 1995; NL, 1995 (except value added at factor cost, 1997).

Source: SBS

NACE Rev. 1 Group 51.7: OTHER WHOLESALE

Table 4.45
Turnover characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Turnover (billion ECU)	2.7	1.3	41.1	:	:	2.2	1.0	13.2	0.2	6.7	2.3	2.8	7.2	0.3	39.9	0.7
Turnover/enterprise (million ECU)	:	0.7	24.8	:	:	0.4	1.3	1.4	0.8	1.4	3.0	0.8	14.5	0.6	1.4	0.6
Turnover/person employed (thousand ECU)	362	230	494	:	:	378	209	323	446	321	689	167	932	:	:	204
Turnover, share in NACE Rev. 1 51 (%)	2.3	2.1	:	:	:	0.5	5.5	4.6	2.6	:	3.2	5.9	18.6	0.3	9.4	1.5

(1) D, IRL and FIN, 1997; DK and A, 1995; NL, turnover 1997; NL, turnover/person employed, 1995.

Table 4.46
Main indicators as a share of turnover, 1996 (1) (%)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Production value	:	:	:	:	:	27.1	30.9	:	16.9	23.3	16.9	:	12.3	:	:	35.1
Value added at factor cost	10.4	:	:	:	:	9.2	19.5	16.2	10.9	15.0	6.0	12.1	5.7	18.8	:	17.0
Personnel costs	7.3	:	:	:	:	:	:	7.4	5.1	7.9	4.6	:	3.4	13.2	5.5	13.0
Gross operating surplus	3.1	:	:	:	:	1.6	:	8.8	5.8	7.0	1.4	5.6	2.3	5.6	:	4.0
Gross investment in tangible goods	:	:	1.0	:	:	1.3	2.0	1.1	:	1.9	13.2	:	0.9	2.5	1.1	:

(1) D, IRL, NL and FIN, 1997; A, 1995.

Table 4.47
Enterprise and employment characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Number of enterprises (thousands)	:	2.0	1.7	:	:	5.2	0.8	9.3	0.2	4.4	0.9	3.4	0.5	0.4	28.0	1.2
Number of persons employed (thousands)	7.5	5.8	83.2	:	:	5.7	4.9	41.0	0.4	22.7	3.3	16.8	7.7	:	:	3.3
Number of persons employed/enterprise (units)	:	2.9	50.3	:	:	1.1	6.4	4.4	1.7	4.4	4.4	5.0	15.6	:	:	2.9
Employees/persons employed (%)	83.2	69.6	:	:	:	92.0	88.6	69.9	65.4	91.5	92.8	90.3	98.4	:	:	86.7
Personnel costs/employee (thousand ECU)	31.8	:	:	:	:	:	:	34.2	34.8	23.6	34.0	:	32.4	30.6	:	30.6
Wages and salaries/personnel costs (%)	75.6	:	:	:	:	:	:	66.8	:	86.9	78.8	:	84.7	70.2	88.4	82.4
Persons employed, share in NACE Rev. 1 51 (%)	3.5	3.4	:	:	:	0.6	9.7	4.1	3.3	:	1.7	6.5	9.7	:	:	3.1

(1) D, IRL and FIN, 1997; DK and A, 1995; NL, 1995 (except wages and salaries/personnel costs, 1997).

Table 4.48
Productivity/competitiveness characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Value added at factor cost (million ECU)	283	:	:	:	:	200	200	2,143	20	998	136	339	407	52	:	116
Value added/person employed (thousand ECU)	37.6	:	:	:	:	34.8	40.9	52.3	48.8	52.9	41.4	20.2	52.9	:	:	34.7
Gross op. surplus/pers. employed (thousand ECU)	11.2	:	:	:	:	6.2	:	28.4	26.0	31.3	9.8	9.3	21.0	:	:	8.2
Gross investment/pers. employed (thousand ECU)	:	:	4.9	:	:	4.7	4.1	3.5	:	4.4	91.0	:	8.8	:	:	:
Wage adjusted labour productivity (%)	118.3	:	:	:	:	:	:	153.0	140.4	224.3	121.7	:	163.2	:	:	113.5

(1) D, IRL and FIN, 1997; A, 1995; NL, 1995 (except value added at factor cost, 1997).

Source: SBS

Retail trade

Retail trade is an essential element for the efficient functioning of a market economy. It provides the link that connects producers and consumers, together with the supporting activity of wholesale trade. These two activities are becoming increasingly difficult to differentiate, as retail groups integrate wholesale trade into their activities and wholesale enterprises turn to direct sales.

The adoption of new technologies over recent decades has helped to increase productivity in retailing. In particular, it has helped to achieve lower inventories, faster receipt of goods and increased labour efficiency (for example, through the use of scanning systems). Larger enterprises such as supermarkets and hypermarkets usually have greater means to adopt such new technologies, due to the cost implications of financing investment.

Two main corporate strategies were identified in the first thematic chapter on the structure and performance of distributive trades: the first concerned cost reductions and economies of scale and scope; whilst the second dealt with strategies of differentiation, typified by an expansion in the range of goods offered to consumers.

The arrival of non-national retailers has led to new styles and methods of operation. In particular, shopping patterns have been changed by an increase in opening hours, as well as Sunday trading (in some countries) and the re-introduction of home deliveries. Nevertheless, the penetration of foreign non-EU retailers into the European market remains limited to a few special areas.

The aim of this section is to give a general picture of retailing within the European Union. The analysis presented will review the latest structural business statistics concerning retail trade, comparing the performance of Europe with that of the USA and Japan. The majority of the data provided relates to 1996. At the end of this section, there is a statistical annex with data for EEA countries from the SBS Regulation at the 3-digit level of the NACE Rev. 1 classification system.

Retail trade in the European Economic Area

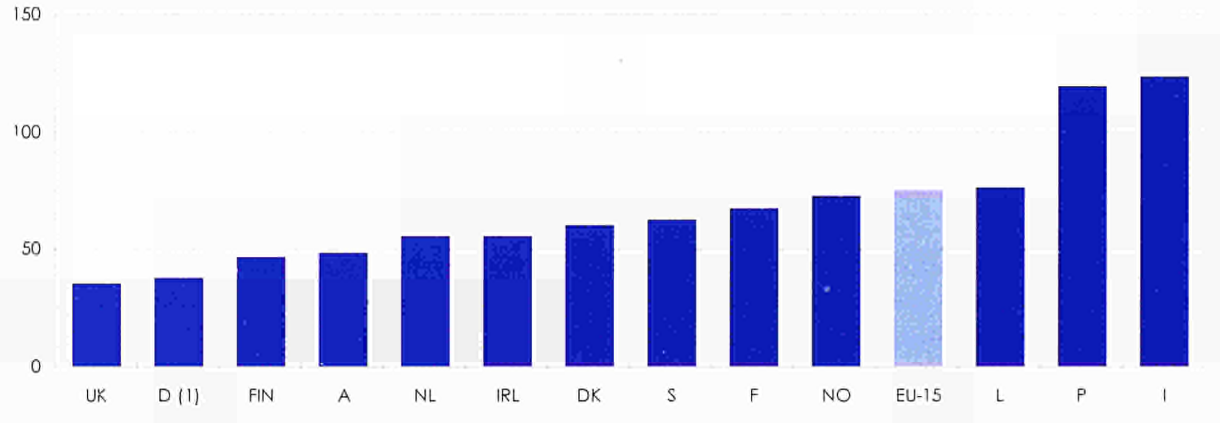
Retail trade had the largest business population in distribution in 1996 with approximatly 2.8 million enterprises in the EU. These enterprises employed in excess of 12.3 million persons. This accounted for between 39.4% (Iceland, estimate) and 62.7% (Ireland) of employment in distribution nationally and for 54.8% of EU distribution employment. As such retail trade had the highest share of employment in distribution in all countries except for Iceland where wholesale trade was marginally greater. In turnover terms retail trade was relatively less important than wholesale trade in all countries and the only country where retail trade turnover approached 40% of turnover in distribution was in Spain (estimate).

The countries with the largest retail trade population in absolute terms were Italy, Spain (estimate) and France. When measured by the size of the labour force, Germany (estimate) and the United Kingdom (estimate) were the largest, each with more than two and a half million persons employed. Germany (estimate), France and the United Kingdom all recorded total retail trade turnover in excess of 200 billion ECU.

Spain (estimate), Italy, Portugal and Greece (estimate) all reported that average turnover per enterprise was low. Retail trade in southern Europe was characterised by the presence of many traditional small, specialist shops, which employed two to three persons on average. Another factor playing an important role in determining the average size of outlets was government regulations. In several countries there were limitations preventing the development of hypermarkets being built. Government regulations usually limited the establishment of new outlets through specific national legislation (France, Italy, Belgium and Spain) or through the context of local and regional planning.

The density of the business population is an important indicator for retail trade showing the ratio of the number of enterprises to the population. The highest ratios by far were recorded in Portugal and Italy where there were 119 and 124 retail enterprises per 10,000 population respectively. Estimates for Greece and Spain suggest even higher figures. The lowest density recorded was in the United Kingdom with only 35 enterprises per 10,000 inhabitants.

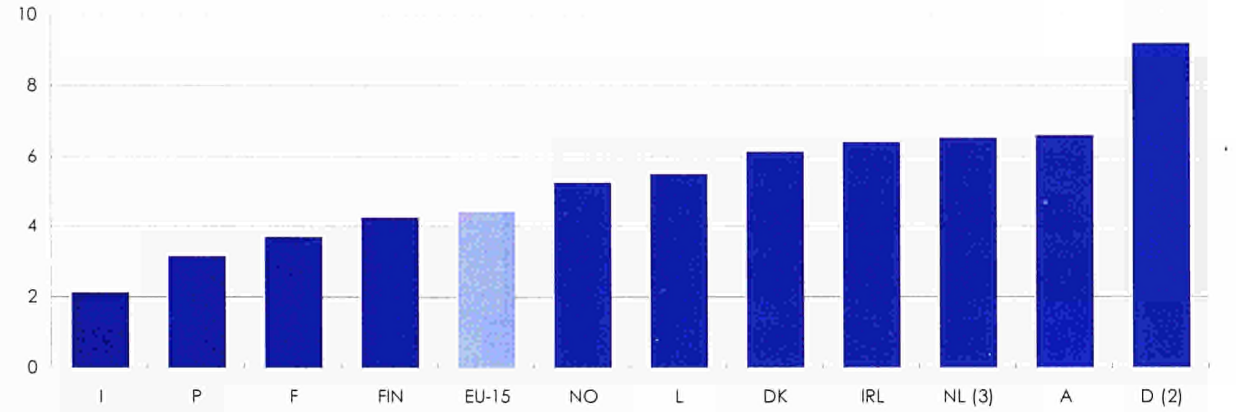
Figure 4.19: retail trade (NACE Rev. 1 Division 52)
Average number of enterprises per 10,000 inhabitants, 1996 (units)



(1) Excluding NACE Rev. 1 52.7.

Source: SBS

Figure 4.20: retail trade (NACE Rev. 1 Division 52)
Average number of persons employed per enterprise, 1996 (1) — **(units)**

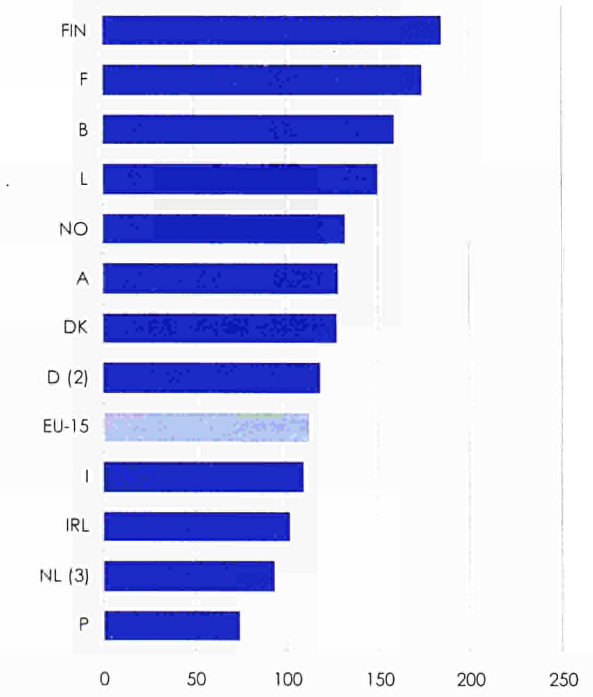


(1) D, FIN and IRL, 1997; NL, 1995.
(2) Excluding NACE Rev. 1 52.7.
(3) Excluding NACE Rev. 1 52.1, 52.31 and 52.5.

Source: SBS

Unsurprisingly when we look at the size of these enterprises measured as the average number of persons employed per enterprise we find the smallest enterprises in Greece (estimate) and Italy and the largest in the United Kingdom and Germany. Using turnover per enterprise as an alternative size measure, the divide between large northern European enterprises and their smaller southern European counterparts was again apparent with United Kingdom and German enterprises turning over more than 1 million ECU on average (estimates). Retail enterprises in Greece (estmate), Spain (estimate), Italy and Portugal on the other hand had an average turnover of less than a quarter of a million ECU.

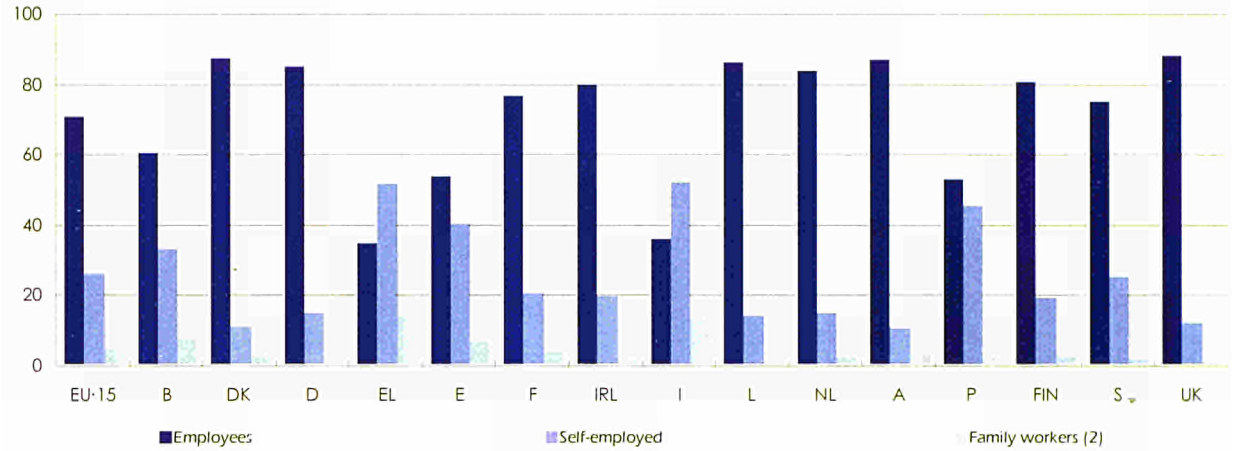
Figure 4.21: retail trade (NACE Rev. 1 Division 52)
Average turnover per person employed, 1996 (1) — **(thousand ECU)**



(1) D, FIN and IRL, 1997; NL, 1995.
(2) Excluding NACE Rev. 1 52.7.
(3) Excluding NACE Rev. 1 52.1, 52.31 and 52.5.

Source: SBS

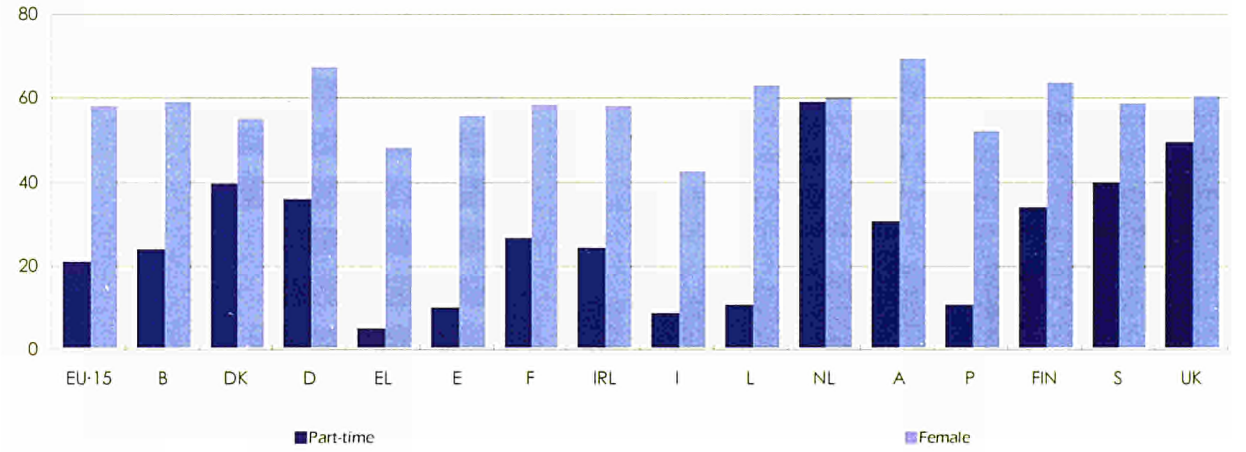
Figure 4.22: retail trade (NACE Rev. 1 Division 52)
Employment characteristics, 1997 (1) — **(% share of total employment)**



(1) Earlier years had to be used for some countries.
(2) L not available.

Source: LFS

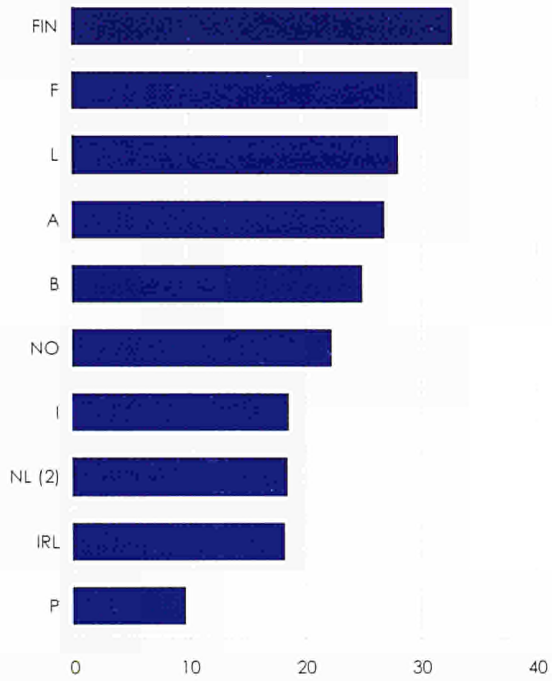
Figure 4.23: retail trade (NACE Rev. 1 Division 52)
Part-time and female participation rates, 1998 (1) — **(% share of total employment)**



(1) EU-15 and IRL, 1997.

Source: LFS

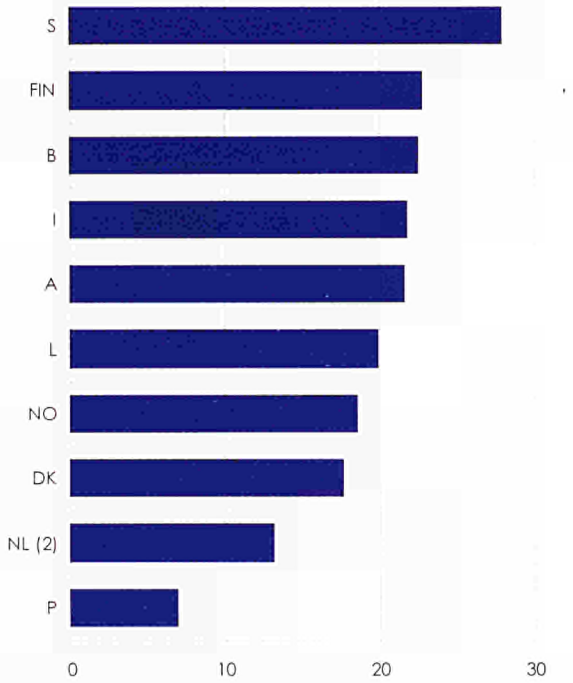
Figure 4.24: retail trade (NACE Rev. 1 Division 52)
Value added per person employed,
1996 (1) ——— (thousand ECU)



(1) FIN and IRL, 1997; A and NL, 1995.
(2) Excluding NACE Rev. 1 52.1, 52.31 and 52.5.

Source: SBS

Figure 4.25: retail trade (NACE Rev. 1 Division 52)
Personnel costs per employee,
1996 (1) ——— (thousand ECU)



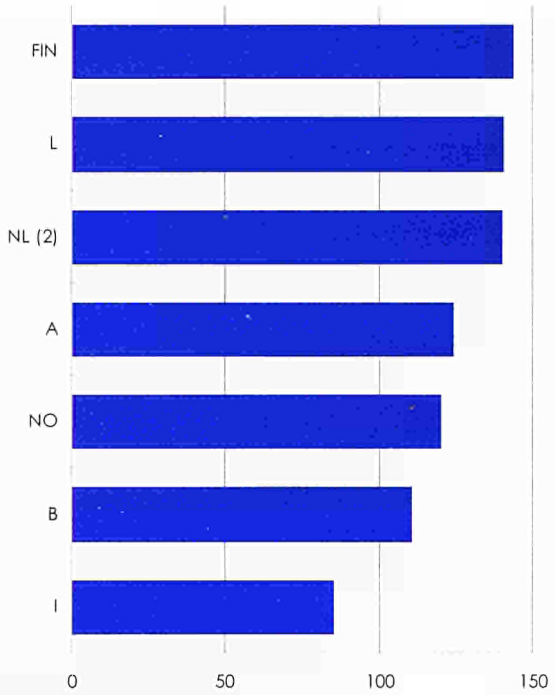
(1) FIN, 1997; A, NL and P, 1995.
(2) Excluding NACE Rev. 1 52.1, 52.31 and 52.5.

Source: SBS

The average cost of employees was highest in Sweden, at just over 28 thousand ECU per head. The lowest costs by far were in Portugal where the average per head was only 7.0 thousand ECU. We can note that average personnel costs per employee were lower in retail trade than either wholesale trade or motor trade, with Italy the only exception where employees in motor trade cost less than in retail trade. Interpretation of these figures on average personnel costs are hampered by the different rates of part-time employment between countries and activities.

The simple productivity measure value added per person employed showed its highest levels for 1996 in Finland (33.0 thousand ECU of value added per person employed), with France and Luxembourg as the next highest. The lowest value added per person employed was in Portugal where each person employed generated 9.8 thousand ECU of value added.

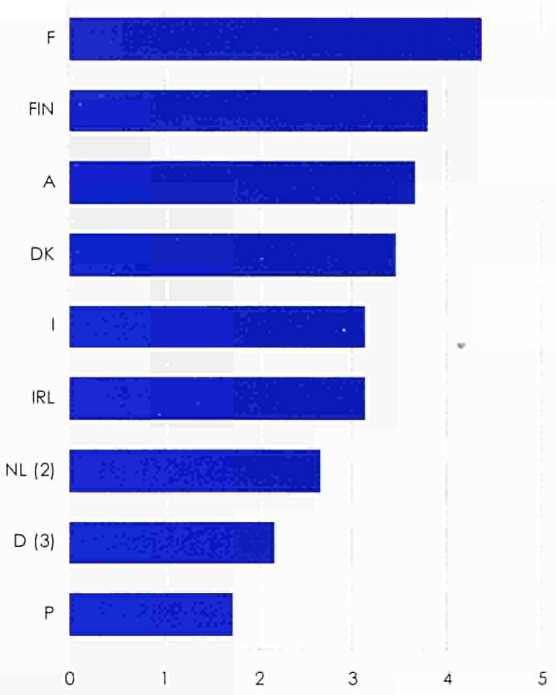
Figure 4.26: retail trade (NACE Rev. 1 Division 52)
Wage adjusted labour productivity,
1996 (1) (%)



(1) FIN, 1997; A and NL, 1995.
(2) Excluding NACE Rev. 1 52.1, 52.31 and 52.5.

Source: SBS

Figure 4.27: retail trade (NACE Rev. 1 Division 52)
Gross investment per person employed,
1997 (1) (thousand ECU)



(1) F and I, 1996; A, NL and P, 1995.
(2) Excluding NACE Rev. 1 51.1, 51.25 and 51.65.
(3) Excluding NACE Rev. 1 51.1.

Source: SBS

Wage adjusted labour productivity which compares value added generated with personnel costs (assuming that the real cost of persons employed without a fixed wage or salary is the same as that of employees) provides a similar picture. Luxembourg and Finland maintained high productivity ratios using this measure. In quantitative terms the data indicates that in the case of Finland 1.44 ECU of value added was generated for every ECU of adjusted personnel costs.

An analysis of the various types of distribution classified as retail trade shows that retail sale in non-specialised stores (NACE Rev. 1 Group 52.1) and other retail sale of new goods in specialised stores (NACE Rev. 1 Group 52.4) were the two largest Groups in retail trade when measured in terms of the number of enterprises, employment and value added. Concentrating on employment, retail in non-specialised stores was the largest retail trade activity in 1996 in Finland (49.3% of retail trade employment) and in Ireland (48.0%). Other retail of new goods in specialised stores was the largest in Austria (55.8% of retail trade employment), Luxembourg (53.4%) and Norway (48.0%), as well as Denmark, France, Italy and Portugal.

The smallest workforce in retail trade and the one that generated the smallest value added was the retail sale of second-hand goods in stores (NACE Rev. 1 Group 52.5) which accounted for about one-quarter of a percent of retail trade employment in Italy and less than 1% in all countries.

Retail sale in non-specialised stores

This activity includes stores with both food and non-food articles. The share of employees in the total number of persons employed was particularly high in this activity when compared to other areas of retailing. This could be explained by the fact that most of the large supermarkets and department stores (with high shares of employees) fell within this category. Most of the countries analysed had a share of employees above the level of 90%, only Italy had a much lower share (64.3%).

The average number of persons employed per enterprise was also much higher in this activity than any other within retail trade. Germany had an average of 28.5 persons employed per enterprise followed by Denmark with 20.6 and France with just over 14. Again, Italy had the lowest figure, only 4.3 persons per enterprise.

Enterprise density, as measured by the number of enterprises per 10,000 inhabitants was lowest in Germany and the Netherlands, 3.9 and 2.8 (1995) respectively. The highest density was found in Ireland, with nearly 16 enterprises per 10,000 inhabitants, followed by Italy and Finland.

Retail sale of food, beverages and tobacco in specialised stores

The number of persons employed per enterprise in this activity, which includes all specialised stores, such as bakers' and butchers' shops, was significantly lower than in the previous Group. Sole proprietorships were a very common form of incorporation amongst specialised stores. Luxembourg and Germany had 5.8 and 5.0 persons employed per enterprise respectively, whilst Italy had an average of just 1.7 persons.

Enterprise density was higher, with Italy leading the ranking with a figure of almost 20 enterprises per 10,000 inhabitants. Italy had a particularly low share of employees in the total number of persons employed, only 15.4%, whereas in Luxembourg, Denmark, Norway and Finland much higher shares were recorded (over 74%).

Retail sale of pharmaceutical and medical goods, cosmetic and toilet articles

Enterprise density in Italy and France was above 5 enterprises per 10,000 inhabitants. No other European country had more than 4 enterprises per 10,000 inhabitants.

The size of enterprises, as measured by average turnover per enterprise was clearly below the norm in Italy and Portugal, whilst in Sweden it rose as high as 3.1 million ECU (the highest in the EU). Sweden was the country that also had the highest personnel costs per employee, on average some 36.8 thousand ECU per head. In Italy, average personnel costs were just over 21 thousand ECU per employee.

The share of employees in the total number of persons employed was above 80% in all countries analysed, except Belgium and Italy (66.4% and 46.3%).

Other retail sale of new goods in specialised stores

This Group includes all non-food and non-pharmaceutical stores, excluding second hand shops. The activity includes the retail sale of textiles, clothing, footwear, furniture and household appliances, as well as books, newspapers and stationery. It was therefore not surprising that enterprise density was significantly higher in this activity, given the broad range of products that are sold within it. Italy had 57 enterprises per 10,000 inhabitants. It is worth mentioning that Luxembourg with nearly 50 also showed a significantly higher figure than the rest of the EU countries. The United Kingdom and Germany, in turn, had figures well below the norm, with 15 and 20 enterprises per 10,000 inhabitants.

It is interesting to note that in Italy the share of employees in the total number of persons employed actually decreased by 4 percentage points between 1995 and 1996, thus bucking the gradual trend towards more employees. Only 33.8% of the total number of persons employed in Italy were employees in 1996.

In Finland the average number of persons employed per enterprise was almost at the same low level (between two and three persons) as Italy. Germany, Austria and the Netherlands had ratios that were almost three times as high.

Retail sale of second-hand goods in stores

In this Group the share of employees in total employment was particularly low in all countries. Only Portugal broke the threshold of 50%. Personnel costs per employee were comparatively low across most countries, ranging between 12.1 thousand ECU (the Netherlands) and 23.1 thousand ECU per head (Italy). Enterprise density was also low in this activity for all countries, which was not surprising given the lack of economic weight of this particular activity.

Retail sale not in stores

This Group includes mail order houses, stalls and markets, and other non-store retail sale. In Italy, the share of employees in total employment was extremely low for this activity, with a share of only 6.5% in 1996. At the same time, Italy had the highest density of enterprises, some 16 per 10,000 inhabitants. The Italian data could be largely attributed to a high number of street market stall holders, practically all of which were sole proprietorships.

In contrast, the figures for Finland and Ireland reported much higher figures for the share of employees in the total number of persons employed, surpassing 80%. In Ireland, the average number of persons employed per enterprise more than doubled between 1995 and 1996.

Conclusions

It may be hoped that the euro will further increase competitiveness within the retail trade sector. One may hope that the introduction of the single currency will introduce more transparency into the European retail market. This will become apparent when national currencies are abandoned and the euro becomes the currency in the pocket of consumers of all eleven participating countries at the start of 2002. Consumers will then be able to compare prices across the euro-zone[1], without having to convert from one currency to another.

As the European economies continue to integrate and the process of internationalisation advances, it can be expected that the increased levels of concentration witnessed in northern Europe will gradually spread to the other Member States. New technologies, together with better management techniques are playing an increasing role in raising the productivity of retail outlets.

Electronic commerce will also lead to additional challenges in this activity, increasing competition to even higher levels. Generally we may expect that electronic commerce will result in lower price levels and more choice for consumers, increasing consumer benefits.

Retail trade in the USA

Retail trade industry in the USA is amongst the most advanced in the world. Government regulations do not normally constitute a large obstacle to the sector and legal opening hours are generally free, with very few restrictions on the establishment of new outlets.

If we take retail sales per person employed, only Germany and Luxembourg had ratios higher than the USA. In terms of retail sales per outlet, the USA ranked as the first country in the world, with the average size of American stores generally large. However, the high number of large enterprises led to a greater level of take-up within the American retail sector for new innovations, products and organisations, increasing still further the dynamism of the US retail sector. Sales increased at an average annual rate of 5.5% (in nominal values) during the period 1980-1997, reaching more than 1,400 billion ECU.

The number of establishments in the US retail sector has remained fairly constant over the nineties and was equal to some 870 thousand in 1997[2]. The number of employees increased during the last decade and stood at over 11.4 million in 1997, resulting in an average number of employees per establishment of just over 13 (well above corresponding European figures). It should be noted that the employment figures for the USA refer solely to employees and not to working proprietors and family workers (although these members of the labour force play less of a role in the USA than they do in Europe).

Men and women were almost equally represented in US retail trade. Weekly earnings were the lowest of all branches except agriculture, reflecting the widespread use of low-skilled labour.

Mail order was an area that was far more developed in the American economy than in the EU. In 1995, some 168 billion ECU of sales were made through orders placed by mail, phone or electronically, without the person ordering going to the point of sale (more than 10% of total retail sales)[2].

Retail trade in Japan

In Japan the number of retail establishments decreased from over 1.6 million in 1985 to just under 1.5 million by 1994. During the same period turnover rose at a rapid pace, rising to almost 1,200 billion ECU by 1997[3].

In the past, government regulations have proven to be very effective in limiting the establishment of large stores in Japan.,A lack of storage space in households and a high population density have resulted in most Japanese people making frequent shopping trips close to home, emphasising the role of small, local retail outlets. These factors have generally prevented the rapid growth of the average size of stores.

However, liberalisation of government regulations during the early 1990's led to a sharp increase in the number of larger establishments and convenience chains. These changes appear to have had a positive effect on productivity, whilst consumers are also reported to have benefited due to lower prices and wider choice.

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(1) Belgium, Germany, Spain, France, Ireland, Italy, Luxembourg, the Netherlands, Austria, Portugal and Finland make up the EUR-11 aggregate, otherwise known as the euro-zone.

(2) Source: U.S. Bureau of the Census.

(3) Source: MITI.

NACE Rev. 1 Group 52.1: RETAIL SALE IN NON-SPECIALISED STORES

Table 4.49
Turnover characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL(2)	A	P	FIN	S	UK	NO
Turnover (billion ECU)	16.3	12.4	127.4	:	:	127.8	6.9	59.7	0.9	18.1	10.2	7.0	11.0	15.5	110.2	10.4
Turnover/enterprise (million ECU)	:	3.2	4.1	:	:	3.6	1.2	0.7	3.1	4.5	2.0	0.5	2.4	2.2	2.9	1.7
Turnover/person employed (thousand ECU)	203	156	142	:	:	254	108	162	208	103	159	102	222	:	:	164
Turnover, share in NACE Rev. 1 52 (%)	37.4	50.3	:	:	:	50.9	51.5	36.3	35.2	:	31.1	25.6	59.3	42.2	46.4	47.5

(1) D, IRL and FIN, 1997; A, 1995; NL, turnover 1997; NL, turnover/person employed, 1995.
(2) Excluding NACE Rev. 1 52.12.

Table 4.50
Main indicators as a share of turnover, 1996 (1) (%)

	B	DK	D	EL	E	F	IRL	I	L	NL(2)	A	P	FIN	S	UK	NO
Production value	:	22.1	:	:	:	21.5	23.5	:	20.7	22.9	25.7	:	23.5	:	:	27.6
Value added at factor cost	14.7	:	:	:	:	12.0	16.3	13.7	12.9	14.7	16.3	11.5	15.3	14.1	:	14.0
Personnel costs	10.7	10.1	:	:	:	:	:	9.1	8.6	9.8	12.1	:	9.8	11.3	9.4	10.0
Gross operating surplus	4.1	1.9	:	:	:	3.3	:	4.6	4.4	4.9	4.1	4.8	5.5	2.8	:	4.0
Gross investment in tangible goods	:	1.7	1.6	:	:	2.2	3.8	2.7	:	2.7	2.8	:	2.2	1.4	3.7	:

(1) D, IRL, NL and FIN, 1997; A, 1995.
(2) Excluding NACE Rev. 1 52.12.

Table 4.51
Enterprise and employment characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL(2)	A	P	FIN	S	UK	NO
Number of enterprises (thousands)	:	3.9	31.4	:	:	36.0	5.8	85.8	0.3	4.1	5.2	13.7	4.6	7.2	37.6	6.3
Number of persons employed (thousands)	80.3	79.5	893.8	:	:	503.8	63.4	367.8	4.4	213.3	64.4	69.0	49.6	:	:	63.6
Number of persons employed/enterprise (units)	:	20.6	28.5	:	:	14.0	10.9	4.3	14.8	48.4	12.3	5.0	10.8	:	:	10.2
Employees/persons employed (%)	88.7	95.6	:	:	:	96.3	86.4	64.3	93.8	96.4	91.9	83.2	94.8	:	:	94.9
Personnel costs/employee (thousand ECU)	24.4	16.5	:	:	:	:	:	23.0	19.1	10.5	21.0	:	22.9	27.4	:	17.2
Wages and salaries/personnel costs (%)	75.6	95.9	:	:	:	:	:	67.6	:	88.6	77.8	:	78.0	71.7	91.5	87.4
Persons employed, share in NACE Rev. 1 52 (%)	29.1	41.0	:	:	:	34.9	48.0	24.3	25.2	:	25.3	18.6	49.3	:	:	38.2

(1) D, IRL and FIN, 1997; A, 1995; NL, 1995 (except wages and salaries/personnel costs, 1997).
(2) Excluding NACE Rev. 1 52.12.

Table 4.52
Productivity/competitiveness characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL(2)	A	P	FIN	S	UK	NO
Value added at factor cost (million ECU)	2,404	:	:	:	:	15,391	1,118	8,197	117	2,651	1,663	806	1,679	2,189	:	1,456
Value added/person employed (thousand ECU)	29.9	:	:	:	:	30.6	17.6	22.3	27.0	15.2	25.8	11.7	33.9	:	:	22.9
Gross op. surplus/pers. employed (thousand ECU)	8.3	3.0	:	:	:	8.3	:	7.5	9.1	5.1	6.6	4.9	12.2	:	:	6.6
Gross investment/pers. employed (thousand ECU)	:	2.7	2.3	:	:	5.6	4.1	4.4	:	2.4	4.4	:	4.9	:	:	:
Wage adjusted labour productivity (%)	122.6	:	:	:	:	:	:	96.9	141.4	144.2	123.2	:	148.3	:	:	133.5

(1) D, IRL and FIN, 1997; A, 1995; NL, 1995 (except value added at factor cost, 1997).
(2) Excluding NACE Rev. 1 52.12.
Source: SBS

NACE Rev. 1 Group 52.2: RETAIL SALE OF FOOD, BEVERAGES AND TOBACCO IN SPECIALISED STORES

Table 4.53
Turnover characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Turnover (billion ECU)	3.8	1.5	14.1	:	:	10.8	0.8	16.3	0.2	4.9	2.3	2.9	0.6	3.5	17.9	1.1
Turnover/enterprise (million ECU)	:	0.3	0.4	:	:	0.2	0.3	0.1	0.6	0.4	0.4	0.1	0.4	0.5	0.3	0.4
Turnover/person employed (thousand ECU)	109	88	83	:	:	106	87	84	109	80	145	58	165	:	:	128
Turnover, share in NACE Rev. 1 52 (%)	8.7	6.1	:	:	:	4.3	6.3	9.9	8.8	:	7.1	10.7	3.0	9.4	7.5	5.1

(1) D, IRL and FIN, 1997; A, 1995; NL, turnover 1997; NL, turnover/person employed, 1995.

Table 4.54
Main indicators as a share of turnover, 1996 (1) (%)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Production value	:	53.5	:	:	:	41.3	29.8	:	39.1	30.8	24.6	:	37.3	:	:	22.8
Value added at factor cost	17.8	:	:	:	:	23.7	19.8	18.5	26.7	19.8	18.1	10.4	24.8	12.9	:	14.1
Personnel costs	7.9	12.3	:	:	:	:	:	3.2	14.2	9.7	9.0	:	15.0	8.9	9.0	10.6
Gross operating surplus	10.0	7.1	:	:	:	8.9	:	15.2	12.5	10.1	9.1	3.7	9.8	3.5	:	3.5
Gross investment in tangible goods	:	1.4	2.0	:	:	3.6	2.1	2.6	:	3.6	1.6	:	2.0	1.6	1.1	:

(1) D, IRL, NL and FIN, 1997; A, 1995.

Table 4.55
Enterprise and employment characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Number of enterprises (thousands)	:	4.9	34.4	:	:	49.2	2.9	117.7	0.4	12.8	5.2	22.5	1.4	7.3	58.3	2.7
Number of persons employed (thousands)	34.7	16.9	170.1	:	:	102.1	9.7	194.7	2.1	66.0	16.0	50.3	3.3	:	:	8.7
Number of persons employed/enterprise (units)	:	3.4	5.0	:	:	2.1	3.4	1.7	5.8	4.7	3.1	2.2	2.5	:	:	3.3
Employees/persons employed (%)	49.3	74.4	:	:	:	67.5	69.2	15.4	83.7	66.8	69.4	61.7	78.7	:	:	76.8
Personnel costs/employee (thousand ECU)	17.5	14.7	:	:	:	:	:	17.7	18.5	12.2	18.7	:	31.6	27.7	:	17.8
Wages and salaries/personnel costs (%)	77.4	92.8	:	:	:	:	:	67.7	:	87.5	77.7	:	76.7	47.9	91.7	85.7
Persons employed, share in NACE Rev. 1 52 (%)	12.6	8.7	:	:	:	7.1	7.3	12.9	12.1	:	6.3	13.5	3.3	:	:	5.2

(1) D, IRL and FIN, 1997; A, 1995; NL, 1995 (except wages and salaries/personnel costs, 1997).

Table 4.56
Productivity/competitiveness characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Value added at factor cost (million ECU)	677	:	:	:	:	2,569	167	3,014	61	971	420	306	137	445	:	158
Value added/person employed (thousand ECU)	19.5	:	:	:	:	25.2	17.2	15.5	29.0	16.7	26.2	6.1	41.0	:	:	18.1
Gross op. surplus/pers. employed (thousand ECU)	10.9	6.3	:	:	:	9.4	:	12.8	13.6	8.5	13.2	2.2	16.2	:	:	4.5
Gross investment/pers. employed (thousand ECU)	:	1.2	1.6	:	:	3.8	1.8	2.2	:	2.8	2.4	:	3.3	:	:	:
Wage adjusted labour productivity (%)	111.7	:	:	:	:	:	:	87.6	157.2	136.4	140.0	:	129.8	:	:	102.0

(1) D, IRL and FIN, 1997; A, 1995; NL, 1995 (except value added at factor cost, 1997).

Source: SBS

NACE Rev. 1 Group 52.3: RETAIL SALE OF PHARMACEUTICAL AND MEDICAL GOODS, COSMETIC AND TOILET ARTICLES

Table 4.57
Turnover characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL(2)	A	P	FIN	S	UK	NO
Turnover (billion ECU)	3.1	1.2	29.2	:	:	23.2	0.8	13.3	0.2	2.0	2.6	2.3	1.2	2.9	9.1	1.0
Turnover/enterprise (million ECU)	:	1.5	1.2	:	:	0.8	0.7	0.4	1.2	1.0	1.3	0.5	1.0	3.1	1.2	0.8
Turnover/person employed (thousand ECU)	170	135	115	:	:	165	107	151	192	93	133	110	163	:	:	130
Turnover, share in NACE Rev. 1 52 (%)	7.0	4.9	:	:	:	9.2	5.7	8.1	6.5	:	8.0	8.3	6.5	7.9	3.8	4.5

(1) D, IRL and FIN, 1997; A, 1995; NL, turnover 1997; NL, turnover/person employed, 1995.
(2) Excluding NACE Rev. 1 52.31.

Table 4.58
Main indicators as a share of turnover, 1996 (1) (%)

	B	DK	D	EL	E	F	IRL	I	L	NL(2)	A	P	FIN	S	UK	NO
Production value	:	29.7	:	:	:	33.0	32.2	:	28.9	33.5	35.1	:	37.0	:	:	29.4
Value added at factor cost	22.0	:	:	:	:	25.4	22.9	20.2	21.8	21.8	23.9	18.4	25.5	16.9	:	20.7
Personnel costs	9.8	16.4	:	:	:	:	:	6.5	10.2	11.2	15.1	:	13.8	13.5	10.3	17.5
Gross operating surplus	12.2	4.9	:	:	:	11.4	:	13.7	11.6	10.6	8.7	9.3	11.7	3.5	:	3.2
Gross investment in tangible goods	:	0.9	1.3	:	:	1.9	1.9	1.5	:	4.0	2.3	:	1.0	1.2	1.6	:

(1) D, IRL, NL and FIN, 1997; A, 1995.
(2) Excluding NACE Rev. 1 52.31.

Table 4.59
Enterprise and employment characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL(2)	A	P	FIN	S	UK	NO
Number of enterprises (thousands)	:	0.8	25.0	:	:	29.5	1.1	32.7	0.1	3.2	2.2	4.6	1.2	0.9	7.3	1.2
Number of persons employed (thousands)	18.0	8.9	253.5	:	:	141.1	7.1	88.1	0.9	20.0	19.7	20.7	7.4	:	:	7.6
Number of persons employed/enterprise (units)	:	11.0	10.2	:	:	4.8	6.3	2.7	6.5	9.7	10.1	4.5	6.1	:	:	6.3
Employees/persons employed (%)	66.4	92.4	:	:	:	86.2	88.4	46.3	82.9	86.0	90.2	88.3	89.9	:	:	88.5
Personnel costs/employee (thousand ECU)	25.0	24.0	:	:	:	:	:	21.3	23.7	13.1	22.3	:	25.0	36.8	:	25.6
Wages and salaries/personnel costs (%)	77.3	85.2	:	:	:	:	:	66.9	:	89.5	78.5	:	79.6	68.4	92.2	82.4
Persons employed, share in NACE Rev. 1 52 (%)	6.5	4.6	:	:	:	9.8	5.4	5.8	5.0	:	7.8	5.6	7.4	:	:	4.5

(1) D, IRL and FIN, 1997; A, 1995; NL, 1995 (except wages and salaries/personnel costs, 1997).
(2) Excluding NACE Rev. 1 52.31.

Table 4.60
Productivity/competitiveness characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL(2)	A	P	FIN	S	UK	NO
Value added at factor cost (million ECU)	671	:	:	:	:	5,885	173	2,695	37	432	626	419	309	490	:	203
Value added/person employed (thousand ECU)	37.3	:	:	:	:	41.7	24.4	30.6	41.9	21.4	31.7	20.3	41.6	:	:	26.9
Gross op. surplus/pers. employed (thousand ECU)	20.7	6.6	:	:	:	18.7	:	20.7	22.3	10.2	11.6	10.3	19.1	:	:	4.2
Gross investment/pers. employed (thousand ECU)	:	1.2	1.5	:	:	3.1	2.0	2.3	:	3.0	3.1	:	1.6	:	:	:
Wage adjusted labour productivity (%)	149.6	:	:	:	:	:	:	143.6	176.8	163.8	142.4	:	166.3	:	:	104.9

(1) D, IRL and FIN, 1997; A, 1995; NL, 1995 (except value added at factor cost, 1997).
(2) Excluding NACE Rev. 1 52.31.
Source: SBS

NACE Rev. 1 Group 52.4: OTHER RETAIL SALE OF NEW GOODS IN SPECIALISED STORES

Table 4.61
Turnover characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Turnover (billion ECU)	18.9	9.0	113.2	:	:	75.2	4.6	65.0	1.2	27.7	16.4	14.4	5.3	13.3	86.6	8.8
Turnover/enterprise (million ECU)	:	0.5	0.7	:	:	0.4	0.5	0.2	0.6	0.6	0.8	0.2	0.4	0.4	1.0	0.5
Turnover/person employed (thousand ECU)	150	110	97	:	:	132	96	95	131	93	116	69	146	:	:	111
Turnover, share in NACE Rev. 1 52 (%)	43.2	36.5	:	:	:	29.9	34.8	39.6	46.9	:	49.8	52.5	28.4	36.3	36.5	40.4

(1) D, IRL and FIN, 1997; A, 1995; NL, turnover 1997; NL, turnover/person employed, 1995.

Table 4.62
Main indicators as a share of turnover, 1996 (1) (%)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Production value	:	38.4	:	:	:	41.0	31.6	:	36.0	36.8	38.3	:	33.2	:	:	38.6
Value added at factor cost	15.2	:	:	:	:	21.7	19.3	19.0	21.2	22.3	23.5	13.7	20.3	20.9	:	20.4
Personnel costs	8.3	14.2	:	:	:	:	:	7.6	12.6	12.6	16.7	:	12.2	14.8	11.3	15.5
Gross operating surplus	6.9	7.4	:	:	:	5.7	:	11.3	8.6	9.7	6.8	4.4	8.1	6.1	:	4.9
Gross investment in tangible goods	:	4.4	2.2	:	:	3.2	2.5	3.2	:	3.4	3.1	:	2.0	2.7	3.5	:

(1) D, IRL, NL and FIN, 1997; A, 1995.

Table 4.63
Enterprise and employment characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Number of enterprises (thousands)	:	18.1	156.7	:	:	180.4	9.5	338.3	2.1	42.6	22.3	60.7	13.4	33.5	90.3	18.0
Number of persons employed (thousands)	125.3	81.7	1,170.2	:	:	569.2	48.4	680.8	9.2	279.4	141.8	207.7	36.0	:	:	79.7
Number of persons employed/enterprise (units)	:	4.5	7.5	:	:	3.2	5.1	2.0	4.5	6.0	6.7	3.4	2.7	:	:	4.4
Employees/persons employed (%)	57.4	83.0	:	:	:	84.9	79.3	33.8	79.9	78.4	87.1	81.4	81.6	:	:	88.9
Personnel costs/employee (thousand ECU)	21.8	18.9	:	:	:	:	:	21.6	20.6	15.5	22.1	:	21.9	27.1	:	19.3
Wages and salaries/personnel costs (%)	77.5	95.1	:	:	:	:	:	66.3	:	88.8	78.1	:	79.4	70.5	89.7	86.5
Persons employed, share in NACE Rev. 1 52 (%)	45.5	42.1	:	:	:	39.4	36.7	45.1	53.4	:	55.8	55.9	35.8	:	:	48.0

(1) D, IRL and FIN, 1997; A, 1995; NL, 1995 (except wages and salaries/personnel costs, 1997).

Table 4.64
Productivity/competitiveness characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Value added at factor cost (million ECU)	2,867	:	:	:	:	16,304	894	12,324	256	6,156	3,855	1,970	1,071	2,780	:	1,805
Value added/person employed (thousand ECU)	22.9	:	:	:	:	28.6	18.5	18.1	27.8	21.1	27.2	9.5	29.8	:	:	22.6
Gross op. surplus/pers. employed (thousand ECU)	10.3	8.1	:	:	:	7.6	:	10.8	11.3	9.0	7.9	3.0	11.9	:	:	5.5
Gross investment/pers. employed (thousand ECU)	:	4.8	2.2	:	:	4.2	2.4	3.0	:	2.8	3.6	:	2.9	:	:	:
Wage adjusted labour productivity (%)	104.7	:	:	:	:	:	:	84.0	134.7	136.6	122.8	:	136.1	:	:	117.2

(1) D, IRL and FIN, 1997; A, 1995; NL, 1995 (except value added at factor cost, 1997).

Source: SBS

NACE Rev. 1 Group 52.5: RETAIL SALE OF SECOND-HAND GOODS IN STORES

Table 4.65
Turnover characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Turnover (billion ECU)	0.2	0.1	0.4	:	:	1.2	0.0	0.2	0.0	0.3	0.1	0.1	0.0	0.1	1.9	0.0
Turnover/enterprise (million ECU)	:	0.1	0.1	:	:	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.1	0.4	0.1
Turnover/person employed (thousand ECU)	57	56	61	:	:	101	48	52	82	47	57	56	67	:	:	51
Turnover, share in NACE Rev. 1 52 (%)	0.4	0.3	:	:	:	0.5	0.4	0.1	0.2	:	0.3	0.2	0.2	0.4	0.8	0.2

(1) D, IRL and FIN, 1997; DK, NL and A, 1995.

Table 4.66
Main indicators as a share of turnover, 1996 (1) (%)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Production value	:	42.1	:	:	:	47.9	49.0	:	50.2	50.2	55.8	:	47.9	:	:	53.1
Value added at factor cost	18.5	:	:	:	:	20.0	28.7	27.9	25.5	24.7	30.2	12.1	22.8	19.0	:	25.9
Personnel costs	4.1	8.5	:	:	:	:	:	9.7	9.0	5.8	16.2	:	10.4	8.5	7.5	13.5
Gross operating surplus	14.4	17.6	:	:	:	6.7	:	18.2	16.6	18.9	14.0	2.5	12.4	10.5	:	12.4
Gross investment in tangible goods	:	7.0	6.7	:	:	2.9	5.1	5.6	:	5.6	3.0	:	3.0	2.4	1.1	:

(1) D, IRL and FIN, 1997; NL and A, 1995.

Table 4.67
Enterprise and employment characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Number of enterprises (thousands)	:	1.0	3.4	:	:	12.9	0.4	2.6	0.0	2.8	1.1	0.6	0.7	1.3	5.1	0.6
Number of persons employed (thousands)	2.8	1.3	6.8	:	:	11.9	1.0	4.0	0.1	5.5	1.9	1.1	0.6	:	:	0.8
Number of persons employed/enterprise (units)	:	1.3	2.0	:	:	0.9	2.3	1.6	1.4	1.7	1.9	1.9	0.9	:	:	1.4
Employees/persons employed (%)	16.3	29.9	:	:	:	49.9	38.6	21.6	35.1	22.8	48.1	59.1	39.1	:	:	34.8
Personnel costs/employee (thousand ECU)	14.2	16.1	:	:	:	:	:	23.1	20.8	12.1	19.1	:	18.0	20.9	:	19.8
Wages and salaries/personnel costs (%)	77.5	95.0	:	:	:	:	:	67.3	:	87.5	78.5	:	78.1	69.5	88.5	85.7
Persons employed, share in NACE Rev. 1 52 (%)	1.0	0.7	:	:	:	0.8	0.7	0.3	0.3	:	0.8	0.3	0.6	:	:	0.5

(1) D, IRL and FIN, 1997; NL and A, 1995.

Table 4.68
Productivity/competitiveness characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Value added at factor cost (million ECU)	29	:	:	:	:	241	13	58	1	65	33	8	10	28	:	10
Value added/person employed (thousand ECU)	10.5	:	:	:	:	20.2	13.9	14.4	20.9	11.7	17.1	6.7	15.4	:	:	13.2
Gross op. surplus/pers. employed (thousand ECU)	8.2	9.9	:	:	:	6.8	:	9.4	13.5	9.0	7.9	1.4	8.4	:	:	6.3
Gross investment/pers. employed (thousand ECU)	:	3.9	4.1	:	:	2.9	2.5	2.9	:	2.7	1.7	:	2.1	:	:	:
Wage adjusted labour productivity (%)	73.8	:	:	:	:	:	:	62.4	100.2	96.7	89.5	:	85.6	:	:	66.7

(1) D, IRL and FIN, 1997; NL and A, 1995.

Source: SBS

NACE Rev. 1 Group 52.6: RETAIL SALE NOT IN STORES

Table 4.69
Turnover characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Turnover (billion ECU)	1.3	0.2	33.0	:	:	11.4	0.1	8.4	0.1	3.0	1.1	0.5	0.3	1.0	11.3	0.4
Turnover/enterprise (million ECU)	:	0.2	0.8	:	:	0.2	0.9	0.1	0.3	0.2	0.6	0.1	0.4	0.5	1.8	0.2
Turnover/person employed (thousand ECU)	118	116	166	:	:	132	149	63	119	91	152	45	225	:	:	112
Turnover, share in NACE Rev. 1 52 (%)	2.9	0.9	:	:	:	4.5	1.0	5.1	2.1	:	3.3	1.7	1.8	2.6	4.8	1.7

(1) D, IRL and FIN, 1997; A, 1995; NL, turnover 1997; NL, turnover/person employed, 1995.

Table 4.70
Main indicators as a share of turnover, 1996 (1) (%)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Production value	:	37.0	:	:	:	51.3	39.2	:	29.4	36.3	47.9	:	43.7	:	:	50.3
Value added at factor cost	14.8	:	:	:	:	18.1	21.9	17.0	18.0	21.4	17.3	11.9	16.5	18.4	:	15.9
Personnel costs	6.4	9.9	:	:	:	:	:	2.4	8.6	6.4	12.9	:	8.8	14.4	10.0	9.1
Gross operating surplus	8.5	5.6	:	:	:	4.4	:	14.5	9.3	15.0	4.4	7.0	7.7	4.0	:	6.8
Gross investment in tangible goods	:	2.5	1.8	:	:	1.9	1.4	4.2	:	2.8	2.2	:	0.9	1.5	1.6	:

(1) D, IRL, NL and FIN, 1997; A, 1995.

Table 4.71
Enterprise and employment characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Number of enterprises (thousands)	:	1.2	43.2	:	:	66.5	0.1	103.5	0.2	17.3	1.8	8.4	0.9	2.1	6.3	1.5
Number of persons employed (thousands)	10.7	1.9	198.5	:	:	85.9	0.9	134.5	0.5	32.7	7.2	10.5	1.5	:	:	3.3
Number of persons employed/enterprise (units)	:	1.6	4.6	:	:	1.3	6.3	1.3	2.3	2.0	4.1	1.3	1.8	:	:	2.2
Employees/persons employed (%)	35.7	60.0	:	:	:	69.0	80.6	6.5	53.5	37.5	75.7	18.5	84.1	:	:	58.5
Personnel costs/employee (thousand ECU)	20.9	19.0	:	:	:	:	:	23.6	19.2	14.2	25.9	:	23.6	32.3	:	17.5
Wages and salaries/personnel costs (%)	77.4	94.5	:	:	:	:	:	66.1	:	90.7	77.3	:	80.3	69.5	90.8	85.0
Persons employed, share in NACE Rev. 1 52 (%)	3.9	1.0	:	:	:	5.9	0.7	8.9	2.6	:	2.8	2.8	1.5	:	:	2.0

(1) D, IRL and FIN, 1997; A, 1995; NL, 1995 (except wages and salaries/personnel costs, 1997).

Table 4.72
Productivity/competitiveness characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Value added at factor cost (million ECU)	187	:	:	:	:	2,057	29	1,431	10	649	189	57	56	177	:	59
Value added/person employed (thousand ECU)	17.4	:	:	:	:	23.9	32.6	10.6	21.4	18.7	26.2	5.4	37.2	:	:	17.8
Gross op. surplus/pers. employed (thousand ECU)	10.0	6.4	:	:	:	5.9	:	9.1	11.1	13.4	6.6	3.2	17.4	:	:	7.6
Gross investment/pers. employed (thousand ECU)	:	2.8	2.9	:	:	2.5	2.1	2.6	:	2.3	3.4	:	2.1	:	:	:
Wage adjusted labour productivity (%)	83.3	:	:	:	:	:	:	45.1	111.0	131.6	101.4	:	157.9	:	:	101.7

(1) D, IRL and FIN, 1997; A, 1995; NL, 1995 (except value added at factor cost, 1997).

Source: SBS

NACE Rev. 1 Group 52.7: REPAIR OF PERSONAL AND HOUSEHOLD GOODS

Table 4.73
Turnover characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Turnover (billion ECU)	0.2	0.2	:	:	:	1.5	0.1	1.3	0.0	0.3	0.1	0.3	0.1	0.4	0.5	0.1
Turnover/enterprise (million ECU)	:	0.1	:	:	:	0.1	0.1	0.0	0.1	0.1	0.1	0.0	0.1	0.1	0.3	0.1
Turnover/person employed (thousand ECU)	53	66	:	:	:	50	36	33	43	36	44	23	60	:	:	50
Turnover, share in NACE Rev. 1 52 (%)	0.5	1.0	:	:	:	0.6	0.4	0.8	0.3	:	0.4	1.0	0.7	1.1	0.2	0.6

(1) IRL and FIN, 1997; NL and A, 1995.

Table 4.74
Main indicators as a share of turnover, 1996 (1) (%)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Production value	:	73.0	:	:	:	77.1	66.0	:	73.8	71.5	83.0	:	60.0	:	:	86.3
Value added at factor cost	32.6	:	:	:	:	45.0	45.2	35.2	52.6	51.8	45.7	28.0	40.1	36.8	:	32.5
Personnel costs	16.3	20.8	:	:	:	:	:	8.8	27.4	21.2	34.8	:	19.9	25.3	34.9	21.6
Gross operating surplus	16.3	17.0	:	:	:	12.2	:	26.3	25.2	30.5	10.9	11.7	20.2	11.5	:	10.9
Gross investment in tangible goods	:	7.3	:	:	:	3.6	1.5	6.0	:	6.9	4.5	:	3.8	2.6	3.4	:

(1) IRL and FIN, 1997; NL and A, 1995.

Table 4.75
Enterprise and employment characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Number of enterprises (thousands)	:	1.9	:	:	:	18.0	0.8	28.1	0.1	3.1	1.1	7.7	1.5	3.1	2.0	1.6
Number of persons employed (thousands)	3.8	3.7	:	:	:	30.7	1.5	40.7	0.2	7.7	3.1	12.1	2.0	:	:	2.6
Number of persons employed/enterprise (units)	:	2.0	:	:	:	1.7	1.9	1.4	2.8	2.3	2.8	1.6	1.3	:	:	1.6
Employees/persons employed (%)	34.8	59.3	:	:	:	61.9	46.2	16.7	63.4	41.0	70.2	41.9	56.3	:	:	45.9
Personnel costs/employee (thousand ECU)	24.6	23.3	:	:	:	:	:	17.2	18.8	18.9	22.0	:	21.3	30.6	:	23.8
Wages and salaries/personnel costs (%)	71.9	89.3	:	:	:	:	:	70.0	:	88.1	78.4	:	80.0	69.3	90.8	86.9
Persons employed, share in NACE Rev. 1 52 (%)	1.4	1.9	:	:	:	2.1	1.2	2.7	1.2	:	1.2	3.2	2.0	:	:	1.6

(1) IRL and FIN, 1997; NL and A, 1995.

Table 4.76
Productivity/competitiveness characteristics, 1996 (1)

	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK	NO
Value added at factor cost (million ECU)	65	:	:	:	:	696	25	466	5	146	62	76	49	154	:	43
Value added/person employed (thousand ECU)	17.1	:	:	:	:	22.7	16.2	11.5	22.9	18.9	20.3	6.3	24.2	:	:	16.4
Gross op. surplus/pers. employed (thousand ECU)	8.6	11.3	:	:	:	6.2	:	8.6	11.0	11.1	4.9	2.6	12.2	:	:	5.5
Gross investment/pers. employed (thousand ECU)	:	4.8	:	:	:	1.8	0.5	1.9	:	2.5	2.0	:	2.3	:	:	:
Wage adjusted labour productivity (%)	69.7	:	:	:	:	:	:	66.5	121.9	99.8	92.2	:	113.6	:	:	68.9

(1) IRL and FIN, 1997; NL and A, 1995.

Source: SBS

Country analysis

This section provides information on the structure and performance of distributive trades' activities within the economy of each country in the European Economic Area (EEA), as well as Central European Countries (CECs). The data provided is presented within a standard set of tables, with the same presentation used for all countries.

For a descriptive analysis of the trends observed within the EEA, please refer to the structural or sectoral analysis.

Table 5.1

Five leading groups in the retail food industry, 1997

	Total sales (million ECU)	Market share (%)	Food sales (million ECU)	Market share (%)
GIB	6,247	30.7	4,248	27.3
Delhaize le Lion	2,747	13.5	2,582	16.6
Colruyt	1,786	8.8	1,477	9.5
Aldi	1,309	6.4	1,178	7.6
Louis Delhaize (Cora B)	1,299	6.4	1,039	6.7
Market leaders 1-5	13,388	65.7	10,525	67.6

Source: M+M Eurodata

Table 5.2

Main indicators as a share of turnover, 1996 (%)

NACE Rev. 1	Turnover (million ECU)	Production value	Value added at factor cost	Personnel costs	Gross operating surplus	Gross investment in tangible goods
Total	195,747	:	10.6	6.4	4.2	:
Motor	33,458	:	8.1	5.1	3.0	:
50.1	23,215	:	6.1	3.9	2.2	:
50.2	3,619	:	19.4	11.5	7.9	:
50.3	3,533	:	12.2	8.3	3.8	:
50.4	579	:	6.9	3.5	3.4	:
50.5	2,513	:	5.0	1.9	3.1	:
Wholesale	118,663	:	9.5	5.8	3.6	:
51.1	3,388	:	16.7	7.2	9.5	:
51.2	5,571	:	4.8	2.2	2.6	:
51.3	21,703	:	6.9	4.2	2.6	:
51.4	23,084	:	13.0	8.2	4.8	:
51.5	45,896	:	5.8	3.4	2.4	:
51.6	16,293	:	18.1	12.2	5.9	:
51.7	2,728	:	10.4	7.3	3.1	:
Retail	43,627	:	15.8	9.2	6.6	:
52.1	16,303	:	14.7	10.7	4.1	:
52.2	3,795	:	17.8	7.9	10.0	:
52.3	3,053	:	22.0	9.8	12.2	:
52.4	18,857	:	15.2	8.3	6.9	:
52.5	159	:	18.5	4.1	14.4	:
52.6	1,259	:	14.8	6.4	8.5	:
52.7	201	:	32.6	16.3	16.3	:

Source: SBS

NACE Rev. 1

50: sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel

50.1: sale of motor vehicles; 50.2: maintenance and repair of motor vehicles; 50.3: sale of motor vehicles parts and accessories; 50.4: sale, maintenance and repair of motorcycles and related parts and accessories; 50.5: retail sale of automotive fuel;

51: wholesale trade and commission trade, except of motor vehicles and motorcycles

51.1: wholesale on a fee or contract basis; 51.2: wholesale of agricultural raw materials and live animals; 51.3: wholesale of food, beverages and tobacco; 51.4: wholesale of household goods; 51.5: wholesale of non-agricultural intermediate products, waste and scrap; 51.6: wholesale of machinery, equipment and supplies; 51.7: other wholesale;

52: retail trade, except of motor vehicles and motorcycles; repair of personal and household goods

52.1: retail sale in non-specialised stores; 52.2: retail sale of food, beverages and tobacco in specialised stores; 52.3: retail sale of pharmaceuticals and medical goods, cosmetic and toilet articles; 52.4: other retail sale of new goods in specialised stores; 52.5: retail sale of second-hand goods in stores; 52.6: retail sale not in stores; 52.7: repair of personal and household goods.

Table 5.3

Enterprise and employment characteristics, 1996

NACE Rev. 1	Number of enterprises (units)	Number of persons employed (units)	Number of persons employed/enterprise (units)	Share of employees in the number of persons employed (%)	Personnel costs per employee (thousand ECU)
Total	:	569,230	:	70.4	31.5
Motor	:	77,077	:	69.8	31.5
50.1	:	34,498	:	77.4	34.4
50.2	:	25,409	:	61.6	26.6
50.3	:	10,565	:	80.4	34.7
50.4	:	1,792	:	47.7	23.6'
50.5	:	4,813	:	44.2	22.4
Wholesale	:	216,474	:	78.2	40.8
51.1	:	16,172	:	33.9	44.6
51.2	:	7,042	:	53.7	32.4
51.3	:	36,826	:	78.9	31.5
51.4	:	57,967	:	80.9	40.4
51.5	:	43,502	:	83.6	42.3
51.6	:	47,429	:	87.3	47.9
51.7	:	7,536	:	83.2	31.8
Retail	:	275,679	:	64.5	22.6
52.1	:	80,327	:	88.7	24.4
52.2	:	34,722	:	49.3	17.5
52.3	:	17,985	:	66.4	25.0
52.4	:	125,319	:	57.4	21.8
52.5	:	2,802	:	16.3	14.2
52.6	:	10,703	:	35.7	20.9
52.7	:	3,821	:	34.8	24.6

Table 5.4

Productivity/competitiveness characteristics, 1996

NACE Rev. 1	Turnover per enterprise (thousand ECU)	Turnover per person employed (thousand ECU)	Value added per person employed (thousand ECU)	Gross operating surplus per person employed (thousand ECU)	Wage adjusted labour productivity (%)
Total	:	343.9	36.6	14.4	116.3
Motor	:	434.1	35.2	13.2	111.8
50.1	:	672.9	41.2	14.6	119.8
50.2	:	142.4	27.6	11.2	103.7
50.3	:	334.4	40.7	12.8	117.3
50.4	:	323.0	22.2	10.9	94.1
50.5	:	522.1	26.1	16.2	116.6
Wholesale	:	548.2	51.9	20.0	127.2
51.1	:	209.5	35.1	20.0	78.6
51.2	:	791.1	37.9	20.5	116.9
51.3	:	589.3	40.4	15.6	128.5
51.4	:	398.2	52.0	19.2	128.5
51.5	:	1,055.0	61.0	25.7	144.2
51.6	:	343.5	62.3	20.4	129.9
51.7	:	362.0	37.6	11.2	118.3
Retail	:	158.3	25.0	10.4	110.6
52.1	:	203.0	29.9	8.3	122.6
52.2	:	109.3	19.5	10.9	111.7
52.3	:	169.8	37.3	20.7	149.6
52.4	:	150.5	22.9	10.3	104.7
52.5	:	56.8	10.5	8.2	73.8
52.6	:	117.7	17.4	10.0	83.3
52.7	:	52.6	17.1	8.6	69.7

Source: SBS

Table 5.5

Five leading groups in the retail food industry, 1997

	Total sales (million ECU)	Market share (%)	Food sales (million ECU)	Market share (%)
FDB	5,030	38.0	4,024	37.9
Dansk Supermarket	3,069	23.2	2,394	22.5
Dagrofa	1,012	7.7	809	7.6
Aldi	534	4.0	508	4.8
Centralköb	454	3.4	363	3.4
Market leaders 1-5	10,099	76.4	8,098	76.2

Source: M+M Eurodata

Table 5.6

Main indicators as a share of turnover, 1995 (1) (%)

NACE Rev. 1	Turnover (million ECU)	Production value	Value added at factor cost	Personnel costs	Gross operating surplus	Gross investment in tangible goods
Total	97,789	:	:	:	:	:
Motor	11,377	:	:	:	:	:
50.1	6,913	:	:	:	:	:
50.2	1,771	:	:	:	:	:
50.3	842	:	:	:	:	:
50.4	78	:	:	:	:	:
50.5	1,773	:	:	:	:	:
Wholesale	61,988	:	:	:	:	:
51.1	1,948	:	:	:	:	:
51.2	5,272	:	:	:	:	:
51.3	11,842	:	:	:	:	:
51.4	11,450	:	:	:	:	:
51.5	17,117	:	:	:	:	:
51.6	13,028	:	:	:	:	:
51.7	1,331	:	:	:	:	:
Retail	24,611	31.1	:	12.2	4.6	2.7
52.1	12,380	22.1	:	10.1	1.9	1.7
52.2	1,496	53.5	:	12.3	7.1	1.4
52.3	1,201	29.7	:	16.4	4.9	0.9
52.4	8,988	38.4	:	14.2	7.4	4.4
52.5	73	42.1	:	8.5	17.6	7.0
52.6	225	37.0	:	9.9	5.6	2.5
52.7	248	73.0	:	20.8	17.0	7.3

(1) NACE Rev. 1 Division 52 and Groups of, 1996.

Source: SBS

NACE Rev. 1

50: sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel

50.1: sale of motor vehicles; 50.2: maintenance and repair of motor vehicles; 50.3: sale of motor vehicles parts and accessories; 50.4: sale, maintenance and repair of motorcycles and related parts and accessories; 50.5: retail sale of automotive fuel;

51: wholesale trade and commission trade, except of motor vehicles and motorcycles

51.1: wholesale on a fee or contract basis; 51.2: wholesale of agricultural raw materials and live animals; 51.3: wholesale of food, beverages and tobacco; 51.4: wholesale of household goods; 51.5: wholesale of non-agricultural intermediate products, waste and scrap; 51.6: wholesale of machinery, equipment and supplies; 51.7: other wholesale;

52: retail trade, except of motor vehicles and motorcycles; repair of personal and household goods

52.1: retail sale in non-specialised stores; 52.2: retail sale of food, beverages and tobacco in specialised stores; 52.3: retail sale of pharmaceuticals and medical goods, cosmetic and toilet articles; 52.4: other retail sale of new goods in specialised stores; 52.5: retail sale of second-hand goods in stores; 52.6: retail sale not in stores; 52.7: repair of personal and household goods.

Table 5.7

Enterprise and employment characteristics, 1995 (1)

NACE Rev. 1	Number of enterprises (units)	Number of persons employed (units)	Number of persons employed/enterprise (units)	Share of employees in the number of persons employed (%)	Personnel costs per employee (thousand ECU)
Total	73,049	421,586	5.77	79.6	:
Motor	12,726	62,997	4.95	64.5	:
50.1	3,670	27,789	7.57	80.9	:
50.2	6,738	18,318	2.72	55.4	:
50.3	886	5,143	5.80	79.9	:
50.4	142	355	2.50	65.1	:
50.5	1,290	11,392	8.83	32.3	:
Wholesale	28,286	168,957	5.97	77.7	:
51.1	2,238	5,886	2.63	62.9	:
51.2	1,552	10,530	6.78	74.8	:
51.3	3,800	22,383	5.89	73.2	:
51.4	7,815	33,785	4.32	74.3	:
51.5	4,207	37,413	8.89	79.1	:
51.6	6,672	53,166	7.97	83.7	:
51.7	2,002	5,794	2.89	69.6	:
Retail	31,735	193,910	6.11	86.8	17.8
52.1	3,852	79,482	20.63	95.6	16.5
52.2	4,917	16,927	3.44	74.4	14.7
52.3	804	8,874	11.04	92.4	24.0
52.4	18,109	81,659	4.51	83.0	18.9
52.5	965	1,291	1.34	29.9	16.1
52.6	1,232	1,946	1.58	60.0	19.0
52.7	1,856	3,731	2.01	59.3	23.3

(1) NACE Rev. 1 Division 52 and Groups of, 1996.

Table 5.8

Productivity/competitiveness characteristics, 1995 (1)

NACE Rev. 1	Turnover per enterprise (thousand ECU)	Turnover per person employed (thousand ECU)	Value added per person employed (thousand ECU)	Gross operating surplus per person employed (thousand ECU)	Wage adjusted labour productivity (%)
Total	1,338.7	232.0	:	:	:
Motor	894.0	180.6	:	:	:
50.1	1,883.7	248.8	:	:	:
50.2	262.9	96.7	:	:	:
50.3	949.8	163.6	:	:	:
50.4	545.8	218.3	:	:	:
50.5	1,374.8	155.7	:	:	:
Wholesale	2,191.5	366.9	:	:	:
51.1	870.3	330.9	:	:	:
51.2	3,396.7	500.6	:	:	:
51.3	3,116.4	529.1	:	:	:
51.4	1,465.2	338.9	:	:	:
51.5	4,068.7	457.5	:	:	:
51.6	1,952.7	245.1	:	:	:
51.7	664.7	229.7	:	:	:
Retail	775.5	126.9	:	5.8	:
52.1	3,214.0	155.8	:	3.0	:
52.2	304.2	88.4	:	6.3	:
52.3	1,494.1	135.4	:	6.6	:
52.4	496.3	110.1	:	8.1	:
52.5	75.2	56.2	:	9.9	:
52.6	182.5	115.5	:	6.4	:
52.7	133.7	66.5	:	11.3	:

(1) NACE Rev. 1 Division 52 and Groups of, 1996.

Source: SBS

Table 5.9

Five leading groups in the retail food industry, 1997

	Total sales (million ECU)	Market share (%)	Food sales (million ECU)	Market share (%)
Metro	33,599	18.7	14,555	12.0
Rewe	23,700	13.2	18,725	15.5
Edeka/AVA	21,753	12.1	18,403	15.2
Aldi	17,564	9.8	14,929	12.3
Karstadt	13,505	7.5	1,705	1.4
Market leaders 1-5	110,120	61.3	68,317	56.3

Source: M+M Eurodata

Table 5.10

Main indicators as a share of turnover, 1997 (%)

NACE Rev. 1	Turnover (million ECU)	Production value	Value added at factor cost	Personnel costs	Gross operating surplus	Gross investment in tangible goods
Total (1)	995,280	:	:	:	:	1.5
Motor (2)	121,343	:	:	:	:	1.9
50.1	95,492	:	:	:	:	1.9
50.2	:	:	:	:	:	:
50.3	17,102	:	:	:	:	1.8
50.4	2,561	:	:	:	:	1.9
50.5	6,189	:	:	:	:	2.4
Wholesale (3)	556,631	:	:	:	:	1.2
51.1	:	:	:	:	:	:
51.2	34,119	:	:	:	:	1.0
51.3	119,405	:	:	:	:	0.9
51.4	114,604	:	:	:	:	0.9
51.5	186,949	:	:	:	:	1.5
51.6	60,453	:	:	:	:	1.4
51.7	41,102	:	:	:	:	1.0
Retail (4)	317,306	:	:	:	:	1.8
52.1	127,355	:	:	:	:	1.6
52.2	14,148	:	:	:	:	2.0
52.3	29,200	:	:	:	:	1.3
52.4	113,194	:	:	:	:	2.2
52.5	415	:	:	:	:	6.7
52.6	32,994	:	:	:	:	1.8
52.7	:	:	:	:	:	:

(1) Excluding NACE Rev. 1 50.2, 51.1 and 52.7.
(2) Excluding NACE Rev. 1 50.2.
(3) Excluding NACE Rev. 1 51.1.
(4) Excluding NACE Rev. 1 52.7.

Source: SBS

NACE Rev. 1

50: sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel

50.1: sale of motor vehicles; 50.2: maintenance and repair of motor vehicles; 50.3: sale of motor vehicles parts and accessories; 50.4: sale, maintenance and repair of motorcycles and related parts and accessories; 50.5: retail sale of automotive fuel;

51: wholesale trade and commission trade, except of motor vehicles and motorcycles

51.1: wholesale on a fee or contract basis; 51.2: wholesale of agricultural raw materials and live animals; 51.3: wholesale of food, beverages and tobacco; 51.4: wholesale of household goods; 51.5: wholesale of non-agricultural intermediate products, waste and scrap; 51.6: wholesale of machinery, equipment and supplies; 51.7: other wholesale;

52: retail trade, except of motor vehicles and motorcycles; repair of personal and household goods

52.1: retail sale in non-specialised stores; 52.2: retail sale of food, beverages and tobacco in specialised stores; 52.3: retail sale of pharmaceuticals and medical goods, cosmetic and toilet articles; 52.4: other retail sale of new goods in specialised stores; 52.5: retail sale of second-hand goods in stores; 52.6: retail sale not in stores; 52.7: repair of personal and household goods.

Table 5.11

Enterprise and employment characteristics, 1997

NACE Rev. 1	Number of enterprises (units)	Number of persons employed (units)	Number of persons employed/enterprise (units)	Share of employees in the number of persons employed (%)	Personnel costs per employee (thousand ECU)
Total (1)	408,079	4,395,501	10.77	:	:
Motor (2)	39,006	452,470	11.60	:	:
50.1	22,864	309,426	13.53	:	:
50.2	:	:	:	:	:
50.3	7,169	79,950	11.15	:	:
50.4	1,721	8,594	4.99	:	:
50.5	7,252	54,500	7.52	:	:
Wholesale (3)	74,969	1,250,131	16.68	:	:
51.1	:	:	:	:	:
51.2	6,662	51,983	7.80	:	:
51.3	12,084	225,687	18.68	:	:
51.4	22,432	336,427	15.00	:	:
51.5	18,233	354,042	19.42	:	:
51.6	13,903	198,752	14.30	:	:
51.7	1,655	83,240	50.30	:	:
Retail (4)	294,104	2,692,900	9.16	:	:
52.1	31,416	893,800	28.45	:	:
52.2	34,350	170,100	4.95	:	:
52.3	24,969	253,500	10.15	:	:
52.4	156,733	1,170,200	7.47	:	:
52.5	3,396	6,800	2.00	:	:
52.6	43,240	198,500	4.59	:	:
52.7	:	:	:	:	:

(1) Excluding NACE Rev. 1 50.2, 51.1 and 52.7; (2) Excluding NACE Rev. 1 50.2;
(3) Excluding NACE Rev. 1 51.1; (4) Excluding NACE Rev. 1 52.7.

Table 5.12

Productivity/competitiveness characteristics, 1997

NACE Rev. 1	Turnover per enterprise (thousand ECU)	Turnover per person employed (thousand ECU)	Value added per person employed (thousand ECU)	Gross operating surplus per person employed (thousand ECU)	Wage adjusted labour productivity (%)
Total (1)	2,438.9	226.4	:	:	:
Motor (2)	3,110.9	268.2	:	:	:
50.1	4,176.5	308.6	:	:	:
50.2	:	:	:	:	:
50.3	2,385.5	213.9	:	:	:
50.4	1,487.9	298.0	:	:	:
50.5	853.4	113.6	:	:	:
Wholesale (3)	7,424.8	445.3	:	:	:
51.1	:	:	:	:	:
51.2	5,121.4	656.3	:	:	:
51.3	9,881.2	529.1	:	:	:
51.4	5,109.0	340.7	:	:	:
51.5	10,253.3	528.0	:	:	:
51.6	4,348.2	304.2	:	:	:
51.7	24,834.7	493.8	:	:	:
Retail (4)	1,078.9	117.8	:	:	:
52.1	4,053.8	142.5	:	:	:
52.2	411.9	83.2	:	:	:
52.3	1,169.5	115.2	:	:	:
52.4	722.2	96.7	:	:	:
52.5	122.2	61.0	:	:	:
52.6	763.0	166.2	:	:	:
52.7	:	:	:	:	:

(1) Excluding NACE Rev. 1 50.2, 51.1 and 52.7; (2) Excluding NACE Rev. 1 50.2.
(3) Excluding NACE Rev. 1 51.1; (4) Excluding NACE Rev. 1 52.7.

Source: SBS

Table 5.13

Five leading groups in the retail food industry, 1997

	Total sales (million ECU)	Market share (%)	Food sales (million ECU)	Market share (%)
Marinopoulos	609	9.5	487	8.7
Sklaventis	512	8.0	461	8.2
Makro (Metro GR)	464	7.3	177	3.2
Veropoulos	461	7.2	415	7.4
Continent Hellas	395	6.2	277	4.9
Market leaders 1-5	2,442	38.2	1,817	32.4

Source: M+M Eurodata

Table 5.14

Five leading groups in the retail food industry, 1997

	Total sales (million ECU)	Market share (%)	Food sales (million ECU)	Market share (%)
El Corte Inglés/Hipercor	7,800	18.6	1,560	4.7
Promodès	5,056	12.0	3,792	11.5
Pryca (Carrefour E)	3,506	8.3	1,998	6.1
Alcampo (Auchan E)	2,412	5.7	1,725	5.2
Eroski	2,273	5.4	1,728	5.2
Market leaders 1-5	21,047	50.1	10,803	32.7

Source: M+M Eurodata

Table 5.15

Five leading groups in the retail food industry, 1997

	Total sales (million ECU)	Market share (%)	Food sales (million ECU)	Market share (%)
Intermarché	21,422	14.3	17,138	16.2
Leclerc	21,168	14.1	11,219	10.6
Auchan	17,373	11.6	13,030	12.3
Carrefour (1)	16,360	10.9	9,816	9.3
Promodès	15,858	10.6	12,211	11.5
Market leaders 1-5	92,181	61.5	63,413	59.9

(1) Excluding Comptoirs Modernes.

Source: M+M Eurodata

Table 5.16

Main indicators as a share of turnover, 1996 (%)

NACE Rev. 1	Turnover (million ECU)	Production value	Value added at factor cost	Personnel costs	Gross operating surplus	Gross investment in tangible goods
Total	759,736	28.2	13.1	:	3.4	1.7
Motor	99,026	26.0	13.5	:	2.8	1.7
50.1	71,592	20.3	10.5	:	2.1	1.5
50.2	9,542	53.8	27.6	:	6.5	3.3
50.3	10,475	38.6	20.5	:	4.5	2.2
50.4	2,676	25.3	13.8	:	4.1	1.2
50.5	4,742	27.6	14.1	:	1.9	1.3
Wholesale	409,550	27.0	10.4	:	2.4	1.1
51.1	45,835	21.6	6.6	:	1.8	0.7
51.2	44,825	18.3	5.4	:	1.7	0.9
51.3	93,255	27.1	7.6	:	1.9	0.9
51.4	66,923	30.9	12.5	:	3.1	0.9
51.5	82,904	25.1	10.6	:	2.5	1.2
51.6	73,633	34.3	17.2	:	3.3	1.8
51.7	2,175	27.1	9.2	:	1.6	1.3
Retail	251,160	31.1	17.2	:	5.1	2.5
52.1	127,781	21.5	12.0	:	3.3	2.2
52.2	10,848	41.3	23.7	:	8.9	3.6
52.3	23,208	33.0	25.4	:	11.4	1.9
52.4	75,186	41.0	21.7	:	5.7	3.2
52.5	1,209	47.9	20.0	:	6.7	2.9
52.6	11,379	51.3	18.1	:	4.4	1.9
52.7	1,548	77.1	45.0	:	12.2	3.6

Source: SBS

NACE Rev. 1
50: sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel
50.1: sale of motor vehicles; 50.2: maintenance and repair of motor vehicles; 50.3: sale of motor vehicles parts and accessories; 50.4: sale, maintenance and repair of motorcycles and related parts and accessories; 50.5: retail sale of automotive fuel;

51: wholesale trade and commission trade, except of motor vehicles and motorcycles
51.1: wholesale on a fee or contract basis; 51.2: wholesale of agricultural raw materials and live animals; 51.3: wholesale of food, beverages and tobacco; 51.4: wholesale of household goods; 51.5: wholesale of non-agricultural intermediate products, waste and scrap; 51.6: wholesale of machinery, equipment and supplies; 51.7: other wholesale;

52: retail trade, except of motor vehicles and motorcycles; repair of personal and household goods
52.1: retail sale in non-specialised stores; 52.2: retail sale of food, beverages and tobacco in specialised stores; 52.3: retail sale of pharmaceuticals and medical goods, cosmetic and toilet articles; 52.4: other retail sale of new goods in specialised stores; 52.5: retail sale of second-hand goods in stores; 52.6: retail sale not in stores; 52.7: repair of personal and household goods.

Table 5.17

Enterprise and employment characteristics, 1996

NACE Rev. 1	Number of enterprises (units)	Number of persons employed (units)	Number of persons employed/enterprise (units)	Share of employees in the number of persons employed (%)	Personnel costs per employee (thousand ECU)
Total	636,067	2,805,210	4.41	90.9	:
Motor	82,491	417,956	5.07	91.5	:
50.1	30,137	218,374	7.25	95.2	:
50.2	34,424	100,831	2.93	81.2	:
50.3	6,025	57,200	9.49	97.8	:
50.4	4,517	12,261	2.71	81.0	:
50.5	7,388	29,290	3.96	91.5	:
Wholesale	161,138	942,535	5.85	98.0	:
51.1	39,334	59,981	1.52	94.3	:
51.2	8,236	54,431	6.61	94.5	:
51.3	20,780	176,090	8.47	98.1	:
51.4	35,614	183,482	5.15	98.2	:
51.5	17,535	195,205	11.13	99.0	:
51.6	34,432	267,598	7.77	98.7	:
51.7	5,207	5,748	1.10	92.0	:
Retail	392,438	1,444,720	3.68	86.0	:
52.1	35,968	503,789	14.01	96.3	:
52.2	49,238	102,127	2.07	67.5	:
52.3	29,493	141,065	4.78	86.2	:
52.4	180,358	569,166	3.16	84.9	:
52.5	12,886	11,943	0.93	49.9	:
52.6	66,476	85,895	1.29	69.0	:
52.7	18,019	30,730	1.71	61.9	:

Table 5.18

Productivity/competitiveness characteristics, 1996

NACE Rev. 1	Turnover per enterprise (thousand ECU)	Turnover per person employed (thousand ECU)	Value added per person employed (thousand ECU)	Gross operating surplus per person employed (thousand ECU)	Wage adjusted labour productivity (%)
Total	1,194.4	270.8	35.3	9.1	:
Motor	1,200.4	236.9	32.0	6.7	:
50.1	2,375.6	327.8	34.6	6.8	:
50.2	277.2	94.6	26.1	6.2	:
50.3	1,738.5	183.1	37.5	8.3	:
50.4	592.3	218.2	30.1	9.0	:
50.5	641.8	161.9	22.9	3.0	:
Wholesale	2,541.6	434.5	45.3	10.5	:
51.1	1,165.3	764.2	50.7	13.7	:
51.2	5,442.6	823.5	44.8	13.6	:
51.3	4,487.7	529.6	40.4	10.0	:
51.4	1,879.1	364.7	45.7	11.4	:
51.5	4,727.9	424.7	44.9	10.5	:
51.6	2,138.5	275.2	47.4	8.9	:
51.7	417.7	378.4	34.8	6.2	:
Retail	640.0	173.9	29.9	8.9	:
52.1	3,552.6	253.6	30.6	8.3	:
52.2	220.3	106.2	25.2	9.4	:
52.3	786.9	164.5	41.7	18.7	:
52.4	416.9	132.1	28.6	7.6	:
52.5	93.8	101.2	20.2	6.8	:
52.6	171.2	132.5	23.9	5.9	:
52.7	85.9	50.4	22.7	6.2	:

Source: SBS

Table 5.19

Five leading groups in the retail food industry, 1997

	Total sales (million ECU)	Market share (%)	Food sales (million ECU)	Market share (%)
Dunnes	1,258	15.9	503	8.5
Tesco	1,158	14.7	926	15.7
Musgrave	1,044	13.2	888	15.1
Superquinn	442	5.6	432	7.3
AND	415	5.3	332	5.6
Market leaders 1-5	4,317	54.7	3,082	52.3

Source: M+M Eurodata

Table 5.20

Main indicators as a share of turnover, 1997 (%)

NACE Rev. 1	Turnover (million ECU)	Production value	Value added at factor cost	Personnel costs	Gross operating surplus	Gross investment in tangible goods
Total	40,450	22.3	14.3	:	:	2.0
Motor	8,378	16.1	10.3	:	:	1.0
50.1	5,623	13.3	8.6	:	:	0.6
50.2	578	32.1	21.0	:	:	4.0
50.3	:	:	:	:	:	:
50.4	:	:	:	:	:	:
50.5	1,311	16.1	10.6	:	:	0.9
Wholesale	18,732	21.3	13.4	:	:	1.7
51.1	101	:	60.1	:	:	2.0
51.2	850	20.2	12.4	:	:	1.9
51.3	5,468	14.4	8.9	:	:	1.2
51.4	3,067	26.6	16.6	:	:	1.5
51.5	5,280	18.5	11.2	:	:	2.4
51.6	2,943	28.2	19.2	:	:	1.4
51.7	1,023	30.9	19.5	:	:	2.0
Retail	13,340	27.6	18.1	:	:	3.1
52.1	6,864	23.5	16.3	:	:	3.8
52.2	842	29.8	19.8	:	:	2.1
52.3	755	32.2	22.9	:	:	1.9
52.4	4,644	31.6	19.3	:	:	2.5
52.5	47	49.0	28.7	:	:	5.1
52.6	133	39.2	21.9	:	:	1.4
52.7	54	66.0	45.2	:	:	1.5

Source: SBS

NACE Rev. 1
50: sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel
50.1: sale of motor vehicles; 50.2: maintenance and repair of motor vehicles; 50.3: sale of motor vehicles parts and accessories; 50.4: sale, maintenance and repair of motorcycles and related parts and accessories; 50.5: retail sale of automotive fuel;

51: wholesale trade and commission trade, except of motor vehicles and motorcycles
51.1: wholesale on a fee or contract basis; 51.2: wholesale of agricultural raw materials and live animals; 51.3: wholesale of food, beverages and tobacco; 51.4: wholesale of household goods; 51.5: wholesale of non-agricultural intermediate products, waste and scrap; 51.6: wholesale of machinery, equipment and supplies; 51.7: other wholesale;

52: retail trade, except of motor vehicles and motorcycles; repair of personal and household goods
52.1: retail sale in non-specialised stores; 52.2: retail sale of food, beverages and tobacco in specialised stores; 52.3: retail sale of pharmaceuticals and medical goods, cosmetic and toilet articles; 52.4: other retail sale of new goods in specialised stores; 52.5: retail sale of second-hand goods in stores; 52.6: retail sale not in stores; 52.7: repair of personal and household goods.

Table 5.21

Enterprise and employment characteristics, 1997

NACE Rev. 1	Number of enterprises (units)	Number of persons employed (units)	Number of persons employed/enterprise (units)	Share of employees in the number of persons employed (%)	Personnel costs per employee (thousand ECU)
Total	30,628	212,259	6.93	84.4	:
Motor	5,061	30,089	5.95	82.5	:
50.1	984	10,764	10.94	91.5	:
50.2	2,094	7,051	3.37	67.8	:
50.3	:	:	:	:	:
50.4	:	:	:	:	:
50.5	1,255	7,896	6.29	80.8	:
Wholesale	4,914	50,157	10.21	92.3	:
51.1	510	1,931	3.79	69.4	:
51.2	200	1,617	8.09	87.8	:
51.3	1,016	11,045	10.87	92.9	:
51.4	850	9,627	11.33	94.3	:
51.5	766	10,017	13.08	94.8	:
51.6	813	11,032	13.57	94.1	:
51.7	759	4,888	6.44	88.6	:
Retail	20,653	132,013	6.39	81.8	:
52.1	5,795	63,416	10.94	86.4	:
52.2	2,856	9,694	3.39	69.2	:
52.3	1,132	7,085	6.26	88.4	:
52.4	9,502	48,434	5.10	79.3	:
52.5	412	968	2.35	38.6	:
52.6	141	895	6.35	80.6	:
52.7	815	1,521	1.87	46.2	:

Table 5.22

Productivity/competitiveness characteristics, 1997

NACE Rev. 1	Turnover per enterprise (thousand ECU)	Turnover per person employed (thousand ECU)	Value added per person employed (thousand ECU)	Gross operating surplus per person employed (thousand ECU)	Wage adjusted labour productivity (%)
Total	1,320.7	190.6	27.3	:	:
Motor	1,655.5	278.5	28.8	:	:
50.1	5,714.5	522.4	45.0	:	:
50.2	276.2	82.0	17.2	:	:
50.3	:	:	:	:	:
50.4	:	:	:	:	:
50.5	1,044.3	166.0	17.7	:	:
Wholesale	3,812.0	373.5	50.2	:	:
51.1	199.0	52.6	31.6	:	:
51.2	4,250.8	525.8	65.2	:	:
51.3	5,382.3	495.1	43.9	:	:
51.4	3,608.2	318.6	52.8	:	:
51.5	6,892.5	527.1	59.2	:	:
51.6	3,619.8	266.8	51.2	:	:
51.7	1,347.4	209.2	40.9	:	:
Retail	645.9	101.1	18.3	:	:
52.1	1,184.4	108.2	17.6	:	:
52.2	294.9	86.9	17.2	:	:
52.3	667.2	106.6	24.4	:	:
52.4	488.7	95.9	18.5	:	:
52.5	113.5	48.3	13.9	:	:
52.6	946.2	149.1	32.6	:	:
52.7	66.8	35.8	16.2	:	:

Source: SBS

Table 5.23

Five leading groups in the retail food industry, 1997

	Total sales (million ECU)	Market share (%)	Food sales (million ECU)	Market share (%)
Coop Italia	7,218	9.0	6,279	9.3
Rinascente (Auchan I)	4,209	5.3	2,467	3.7
GS (Promodès I)	4,128	5.2	3,385	5.0
Metro	2,078	2.6	831	1.2
Esselunga	2,073	2.6	1,762	2.6
Market leaders 1-5	19,707	24.7	14,725	21.9

Source: M+M Eurodata

Table 5.24

Main indicators as a share of turnover, 1996 (1) (%)

NACE Rev. 1	Turnover (million ECU)	Production value	Value added at factor cost	Personnel costs	Gross operating surplus	Gross investment in tangible goods
Total (2)	545,733	:	14.4	5.8	8.6	2.0
Motor	95,084	:	11.4	4.7	6.6	1.5
50.1	46,127	:	9.0	3.8	5.2	1.1
50.2	10,772	:	31.7	14.5	17.2	5.7
50.3	8,671	:	15.8	8.1	7.7	1.5
50.4	3,852	:	11.0	3.6	7.5	1.5
50.5	25,663	:	5.7	1.4	4.3	0.4
Wholesale (3)	286,378	:	13.8	5.3	8.5	2.0
51.1	15,797	:	44.9	5.0	40.0	7.8
51.2	13,249	:	7.3	2.5	4.8	1.2
51.3	63,511	:	8.9	4.3	4.5	1.7
51.4	71,714	:	14.8	6.3	8.4	2.2
51.5	87,158	:	9.9	4.0	5.9	1.8
51.6	21,708	:	20.8	11.0	9.8	2.1
51.7	13,241	:	16.2	7.4	8.8	1.1
Retail (4)	164,271	:	17.2	7.4	9.8	2.9
52.1	59,678	:	13.7	9.1	4.6	2.7
52.2	16,313	:	18.5	3.2	15.2	2.6
52.3	13,318	:	20.2	6.5	13.7	1.5
52.4	64,994	:	19.0	7.6	11.3	3.2
52.5	207	:	27.9	9.7	18.2	5.6
52.6	8,435	:	17.0	2.4	14.5	4.2
52.7	1,327	:	35.2	8.8	26.3	6.0

(1) Data for NACE Rev. 1 Section G, 51 and 51.3 for gross investment, 1995.
(2) Excluding NACE Rev. 1 51.11, 51.13, 51.15, 51.25, 52.26, 52.62, 52.71 and 52.73 for gross investment.
(3) Excluding NACE Rev. 1 51.11, 51.13, 51.15 and 51.25 for gross investment.
(4) Excluding NACE Rev. 1 52.26, 52.62, 52.71 and 52.73 for gross investment.

Source: SBS

NACE Rev. 1
50: sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel
50.1: sale of motor vehicles; 50.2: maintenance and repair of motor vehicles; 50.3: sale of motor vehicles parts and accessories; 50.4: sale, maintenance and repair of motorcycles and related parts and accessories; 50.5: retail sale of automotive fuel;

51: wholesale trade and commission trade, except of motor vehicles and motorcycles
51.1: wholesale on a fee or contract basis; 51.2: wholesale of agricultural raw materials and live animals; 51.3: wholesale of food, beverages and tobacco; 51.4: wholesale of household goods; 51.5: wholesale of non-agricultural intermediate products, waste and scrap; 51.6: wholesale of machinery, equipment and supplies; 51.7: other wholesale;

52: retail trade, except of motor vehicles and motorcycles; repair of personal and household goods
52.1: retail sale in non-specialised stores; 52.2: retail sale of food, beverages and tobacco in specialised stores; 52.3: retail sale of pharmaceuticals and medical goods, cosmetic and toilet articles; 52.4: other retail sale of new goods in specialised stores; 52.5: retail sale of second-hand goods in stores; 52.6: retail sale not in stores; 52.7: repair of personal and household goods.

Table 5.25

Enterprise and employment characteristics, 1996

NACE Rev. 1	Number of enterprises (units)	Number of persons employed (units)	Number of persons employed/enterprise (units)	Share of employees in the number of persons employed (%)	Personnel costs per employee (thousand ECU)
Total	1,238,190	2,937,860	2.37	44.2	24.6
Motor	164,400	434,708	2.64	47.6	21.8
50.1	12,415	80,151	6.46	78.9	27.9
50.2	107,659	235,248	2.19	39.3	16.9
50.3	10,599	41,780	3.94	61.8	27.1
50.4	9,506	18,911	1.99	35.6	20.5
50.5	24,221	58,618	2.42	32.4	18.5
Wholesale	365,086	992,486	2.72	54.2	28.3
51.1	222,762	279,848	1.26	10.4	27.0
51.2	8,716	25,385	2.91	50.8	25.8
51.3	36,574	166,661	4.56	66.3	25.0
51.4	45,051	241,790	5.37	75.1	25.0
51.5	28,336	154,042	5.44	72.5	30.9
51.6	14,396	83,807	5.82	75.8	37.7
51.7	9,251	40,953	4.43	69.9	34.2
Retail	708,702	1,510,670	2.13	36.7	21.9
52.1	85,840	367,802	4.28	64.3	23.0
52.2	117,720	194,713	1.65	15.4	17.7
52.3	32,659	88,123	2.70	46.3	21.3
52.4	338,323	680,827	2.01	33.8	21.6
52.5	2,589	4,025	1.55	21.6	23.1
52.6	103,453	134,471	1.30	6.5	23.6
52.7	28,118	40,709	1.45	16.7	17.2

Table 5.26

Productivity/competitiveness characteristics, 1996

NACE Rev. 1	Turnover per enterprise (thousand ECU)	Turnover per person employed (thousand ECU)	Value added per person employed (thousand ECU)	Gross operating surplus per person employed (thousand ECU)	Wage adjusted labour productivity (%)
Total	440.8	185.8	26.7	15.9	108.9
Motor	578.4	218.7	24.9	14.5	114.5
50.1	3,715.4	575.5	52.0	30.0	186.6
50.2	100.1	45.8	14.5	7.9	86.0
50.3	818.1	207.5	32.7	16.0	120.8
50.4	405.2	203.7	22.5	15.2	109.6
50.5	1,059.5	437.8	24.9	18.9	134.8
Wholesale	784.4	288.6	39.9	24.5	140.6
51.1	70.9	56.5	25.4	22.6	94.1
51.2	1,520.1	521.9	38.2	25.1	148.0
51.3	1,736.5	381.1	33.7	17.2	135.1
51.4	1,591.8	296.6	43.8	24.9	174.7
51.5	3,075.9	565.8	55.9	33.5	181.2
51.6	1,507.9	259.0	54.0	25.4	143.1
51.7	1,431.3	323.3	52.3	28.4	153.0
Retail	231.8	108.7	18.7	10.6	85.1
52.1	695.2	162.3	22.3	7.5	96.9
52.2	138.6	83.8	15.5	12.8	87.6
52.3	407.8	151.1	30.6	20.7	143.6
52.4	192.1	95.5	18.1	10.8	84.0
52.5	80.1	51.5	14.4	9.4	62.4
52.6	81.5	62.7	10.6	9.1	45.1
52.7	47.2	32.6	11.5	8.6	66.5

Source: SBS

Table 5.27

Four leading groups in the retail food industry, 1997

	Total sales (million ECU)	Market share (%)	Food sales (million ECU)	Market share (%)
Cactus	408	44.0	306	48.9
Match (Cora L)	273	29.4	218	34.9
Auchan	111	12.0	78	12.5
Metro	71	7.7	-	-
Market leaders 1-4	863	93.1	602	96.3

Source: M+M Eurodata

Table 5.28

Main indicators as a share of turnover, 1996 **(%)**

NACE Rev. 1	Turnover (million ECU)	Production value	Value added at factor cost	Personnel costs	Gross operating surplus	Gross investment in tangible goods
Total	11,780	19.9	12.5	6.3	6.1	:
Motor	2,185	16.0	11.4	5.7	5.7	:
50.1	1,156	18.2	13.1	6.7	6.4	:
50.2	66	33.5	26.5	13.1	13.4	:
50.3	137	22.4	16.3	10.7	5.5	:
50.4	17	20.8	10.9	5.6	5.2	:
50.5	808	10.2	6.8	2.8	4.0	:
Wholesale	7,018	17.3	10.5	4.8	5.7	:
51.1	368	25.5	11.4	4.6	6.8	:
51.2	193	16.2	9.6	4.5	5.1	:
51.3	1,821	12.4	8.2	3.8	4.4	:
51.4	706	25.3	15.5	6.8	8.7	:
51.5	2,657	14.0	8.5	3.0	5.4	:
51.6	1,094	25.9	15.6	9.3	6.3	:
51.7	179	16.9	10.9	5.1	5.8	:
Retail	2,577	30.4	18.9	11.1	7.7	:
52.1	907	20.7	12.9	8.6	4.4	:
52.2	228	39.1	26.7	14.2	12.5	:
52.3	167	28.9	21.8	10.2	11.6	:
52.4	1,208	36.0	21.2	12.6	8.6	:
52.5	5	50.2	25.5	9.0	16.6	:
52.6	54	29.4	18.0	8.6	9.3	:
52.7	9	73.8	52.6	27.4	25.2	:

Source: SBS

NACE Rev. 1
50: sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel
50.1: sale of motor vehicles; 50.2: maintenance and repair of motor vehicles; 50.3: sale of motor vehicles parts and accessories; 50.4: sale, maintenance and repair of motorcycles and related parts and accessories; 50.5: retail sale of automotive fuel;

51: wholesale trade and commission trade, except of motor vehicles and motorcycles
51.1: wholesale on a fee or contract basis; 51.2: wholesale of agricultural raw materials and live animals; 51.3: wholesale of food, beverages and tobacco; 51.4: wholesale of household goods; 51.5: wholesale of non-agricultural intermediate products, waste and scrap; 51.6: wholesale of machinery, equipment and supplies; 51.7: other wholesale;

52: retail trade, except of motor vehicles and motorcycles; repair of personal and household goods
52.1: retail sale in non-specialised stores; 52.2: retail sale of food, beverages and tobacco in specialised stores; 52.3: retail sale of pharmaceuticals and medical goods, cosmetic and toilet articles; 52.4: other retail sale of new goods in specialised stores; 52.5: retail sale of second-hand goods in stores; 52.6: retail sale not in stores; 52.7: repair of personal and household goods.

Table 5.29

Enterprise and employment characteristics, 1996

NACE Rev. 1	Number of enterprises (units)	Number of persons employed (units)	Number of persons employed/enterprise (units)	Share of employees in the number of persons employed (%)	Personnel costs per employee (thousand ECU)
Total	6,652	35,199	5.29	85.0	24.9
Motor	848	5,827	6.87	87.6	24.3
50.1	363	3,313	9.13	92.0	25.4
50.2	118	504	4.27	78.6	21.9
50.3	108	592	5.48	85.8	29.0
50.4	11	50	4.55	80.0	24.0
50.5	248	1,369	5.52	81.3	20.0
Wholesale	2,642	12,113	4.58	86.5	31.9
51.1	400	642	1.61	57.8	45.8
51.2	105	396	3.77	75.8	29.2
51.3	314	2,815	8.96	92.8	26.7
51.4	504	1,893	3.76	82.5	30.9
51.5	475	2,795	5.88	90.0	31.7
51.6	613	3,169	5.17	90.0	35.6
51.7	231	402	1.74	65.4	34.8
Retail	3,162	17,259	5.46	83.0	20.0
52.1	294	4,356	14.82	93.8	19.1
52.2	358	2,092	5.84	83.7	18.5
52.3	135	871	6.45	82.9	23.7
52.4	2,064	9,221	4.47	79.9	20.6
52.5	42	57	1.36	35.1	20.8
52.6	195	456	2.34	53.5	19.2
52.7	74	205	2.77	63.4	18.8

Table 5.30

Productivity/competitiveness characteristics, 1996

NACE Rev. 1	Turnover per enterprise (thousand ECU)	Turnover per person employed (thousand ECU)	Value added per person employed (thousand ECU)	Gross operating surplus per person employed (thousand ECU)	Wage adjusted labour productivity (%)
Total	1,770.9	334.7	41.7	20.6	167.6
Motor	2,576.8	375.0	42.6	21.3	175.4
50.1	3,184.4	348.9	45.8	22.4	180.3
50.2	562.2	131.6	34.9	17.7	159.2
50.3	1,271.9	232.0	37.7	12.9	130.2
50.4	1,550.0	341.0	37.0	17.8	154.2
50.5	3,259.8	590.5	40.1	23.8	200.6
Wholesale	2,656.3	579.4	60.7	33.1	190.2
51.1	919.3	572.8	65.2	38.7	142.2
51.2	1,836.3	486.9	46.9	24.8	160.9
51.3	5,798.2	646.8	53.3	28.5	199.8
51.4	1,401.3	373.1	57.9	32.4	187.3
51.5	5,593.2	950.5	80.4	51.8	253.2
51.6	1,785.1	345.3	53.8	21.8	151.3
51.7	776.6	446.3	48.8	26.0	140.4
Retail	815.1	149.3	28.2	11.6	140.7
52.1	3,084.8	208.2	27.0	9.1	141.4
52.2	635.5	108.8	29.0	13.6	157.2
52.3	1,240.3	192.2	41.9	22.3	176.8
52.4	585.0	131.0	27.8	11.3	134.7
52.5	111.0	81.7	20.9	13.5	100.2
52.6	278.2	118.9	21.4	11.1	111.0
52.7	120.4	43.5	22.9	11.0	121.9

Source: SBS

Table 5.31

Five leading groups in the retail food industry, 1997

	Total sales (million ECU)	Market share (%)	Food sales (million ECU)	Market share (%)
Ahold	7,964	30.4	7,168	34.9
DBU-Vendex (1)	4,604	17.6	4,212	20.5
KBB	2,660	10.2	399	1.9
Makro	1,391	5.3	967	4.7
Aldi	1,215	4.6	1,057	5.1
Market leaders 1-5	17,834	68.1	13,803	67.1

(1) Vendex Food Goep (NL) and De Boer Unigro (NL).

Source: M+M Eurodata

Table 5.32

Main indicators as a share of turnover, 1997 (1) (%)

NACE Rev. 1	Turnover (million ECU)	Production value	Value added at factor cost	Personnel costs	Gross operating surplus	Gross investment in tangible goods
Total (2)	226,067	22.4	:	7.6	:	:
Motor (3)	6,933	21.8	:	7.3	:	:
50.1	:	:	:	:	:	:
50.2	1,262	65.3	:	24.2	:	:
50.3	:	:	:	:	:	:
50.4	696	21.1	:	5.6	:	:
50.5	4,975	10.9	:	3.3	:	:
Wholesale (4)	184,391	19.4	11.2	6.3	5.0	1.5
51.1	:	:	:	:	:	:
51.2	21,102	11.9	6.5	3.7	2.9	1.4
51.3	37,418	13.0	7.5	4.1	3.4	1.5
51.4	34,964	27.0	13.5	7.1	6.4	1.6
51.5	36,912	18.3	11.5	6.4	5.1	1.5
51.6	47,328	22.5	13.9	8.1	5.8	1.4
51.7	6,667	23.3	15.0	7.9	7.0	1.9
Retail (5)	54,561	31.6	19.9	11.3	8.7	2.8
52.1 (6)	18,081	22.9	14.7	9.8	4.9	2.7
52.2	4,903	30.8	19.8	9.7	10.1	3.6
52.3 (7)	1,985	33.5	21.8	11.2	10.6	4.0
52.4	27,659	36.8	22.3	12.6	9.7	3.4
52.5	262	50.2	24.7	5.8	18.9	5.6
52.6	3,032	36.3	21.4	6.4	15.0	2.8
52.7	283	71.5	51.8	21.2	30.5	6.9

(1) NACE Rev. 1 Section G, 1995; NACE Rev. 1 Division 50 and Groups of, 1995; NACE Rev. 1 Division 52 and Groups 52.5 and 52.7, 1995;
(2) Excluding NACE Rev. 1 50.1, 50.3, 51.1, 52.12 and 52.31; (3) Excluding NACE Rev. 1 50.1 and 50.3; (4) Excluding NACE Rev. 1 51.1;
(5) Excluding NACE Rev. 1 52.12 and 52.31; (6) Excluding NACE Rev. 1 52.12; (7) Excluding NACE Rev. 1 52.31.

Source: SBS

NACE Rev. 1
50: sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel
50.1: sale of motor vehicles; 50.2: maintenance and repair of motor vehicles; 50.3: sale of motor vehicles parts and accessories; 50.4: sale, maintenance and repair of motorcycles and related parts and accessories; 50.5: retail sale of automotive fuel;

51: wholesale trade and commission trade, except of motor vehicles and motorcycles
51.1: wholesale on a fee or contract basis; 51.2: wholesale of agricultural raw materials and live animals; 51.3: wholesale of food, beverages and tobacco; 51.4: wholesale of household goods; 51.5: wholesale of non-agricultural intermediate products, waste and scrap; 51.6: wholesale of machinery, equipment and supplies; 51.7: other wholesale;

52: retail trade, except of motor vehicles and motorcycles; repair of personal and household goods
52.1: retail sale in non-specialised stores; 52.2: retail sale of food, beverages and tobacco in specialised stores; 52.3: retail sale of pharmaceuticals and medical goods, cosmetic and toilet articles; 52.4: other retail sale of new goods in specialised stores; 52.5: retail sale of second-hand goods in stores; 52.6: retail sale not in stores; 52.7: repair of personal and household goods.

Table 5.33

Enterprise and employment characteristics, 1995

NACE Rev. 1	Number of enterprises (thousands)	Number of persons employed (units)	Number of persons employed/enterprise (units)	Share of employees in the number of persons employed (%)	Personnel costs per employee (thousand ECU)
Total (2)	156,605	1,023,985	6.92	84.3	20.0
Motor	20,805	127,819	6.02	80.8	26.1
50.1	13,175	82,283	6.11	81.6	26.7
50.2	3,140	16,262	5.05	75.3	25.0
50.3	2,170	16,310	7.47	86.4	28.0
50.4	675	2,238	3.26	70.1	24.9'
50.5	1,645	10,726	6.45	76.6	19.8
Wholesale (3)	49,835	409,842	7.83	92.2	28.1
51.1	4,775	:	:	:	:
51.2	4,430	33,542	6.24	89.2	25.1
51.3	5,660	66,719	11.25	89.3	25.4
51.4	13,245	94,054	6.23	89.8	26.6
51.5	7,065	78,593	9.27	94.4	28.9
51.6	10,285	114,235	9.33	95.3	32.0
51.7	4,375	22,699	4.36	91.5	23.6
Retail (4)	85,965	584,917	6.50	79.2	13.3
52.1 (5)	4,140	213,292	48.35	96.4	10.5
52.2	12,775	66,015	4.67	66.8	12.2
52.3 (6)	3,190	19,973	9.71	86.0	13.1
52.4	42,645	279,424	6.03	78.4	15.5
52.5	2,840	5,520	1.75	22.8	12.1
52.6	17,290	32,729	1.96	37.5	14.2
52.7	3,085	7,749	2.30	41.0	18.9

(1) 1996; (2) Excluding NACE Rev. 1 50.1, 50.3, 51.1, 52.12 and 52.31, except for number of enterprises;
(3) Excluding NACE Rev. 1 51.1, except for number of enterprises; (4) Excluding NACE Rev. 1 52.12 and 52.31, except for number of enterprises;
(5) Excluding NACE Rev. 1 52.12, except for number of enterprises; (6) Excluding NACE Rev. 1 52.31, except for number of enterprises.

Table 5.34

Productivity/competitiveness characteristics, 1995

NACE Rev. 1	Turnover per enterprise (thousand ECU)	Turnover per person employed (thousand ECU)	Value added per person employed (thousand ECU)	Gross operating surplus per person employed (thousand ECU)	Wage adjusted labour productivity (%)
Total (1)	1,528.2	220.8	:	:	:
Motor (2)	1,244.3	237.2	:	:	:
50.1	:	:	:	:	:
50.2	391.7	77.6	:	:	:
50.3	:	:	:	:	:
50.4	1,013.2	311.0	:	:	:
50.5	2,991.6	463.8	:	:	:
Wholesale (3)	3,784.6	401.6	47.9	22.0	170.4
51.1	:	:	:	:	:
51.2	4,436.7	630.7	44.0	21.6	175.4
51.3	6,440.1	540.8	41.8	19.1	164.7
51.4	2,251.8	299.9	43.3	19.4	162.8
51.5	4,970.5	458.2	52.5	25.2	181.5
51.6	4,225.5	313.7	52.4	21.9	163.8
51.7	1,378.1	321.0	52.9	31.3	224.3
Retail (4)	606.1	93.3	18.6	8.1	140.2
52.1 (5)	4,545.5	102.8	15.2	5.1	144.2
52.2	395.1	79.9	16.7	8.5	136.4
52.3 (6)	1,007.8	93.3	21.4	10.2	163.8
52.4	627.8	93.3	21.1	9.0	136.6
52.5	82.9	47.5	11.7	9.0	96.7
52.6	166.2	91.0	18.7	13.4	131.6
52.7	84.0	36.5	18.9	11.1	99.8

(1) Excluding NACE Rev. 1 50.1, 50.3, 51.1, 52.12 and 52.31; (2) Excluding NACE Rev. 1 50.1 and 50.3; (3) Excluding NACE Rev. 1 51.1;
(4) Excluding NACE Rev. 1 52.12 and 52.31; (5) Excluding NACE Rev. 1 52.12; (6) Excluding NACE Rev. 1 52.31.

Source: SBS

Table 5.35

Five leading groups in the retail food industry, 1997

	Total sales (million ECU)	Market share (%)	Food sales (million ECU)	Market share (%)
Billa (Rewe A)	4,522	27.9	4,047	34.3
SPAR	2,544	15.7	2,035	17.3
Metro	1,640	10.1	623	5.3
Hofer (Aldi A)	1,554	9.6	1,399	11.9
Adeg (Edeka A)	776	4.8	698	5.9
Market leaders 1-5	11,037	68.1	8,803	74.7

Source: M+M Eurodata

Table 5.36

Main indicators as a share of turnover, 1995 (%)

NACE Rev. 1	Turnover (million ECU) (1)	Production value (1)	Value added at factor cost	Personnel costs	Gross operating surplus	Gross investment in tangible goods
Total	118,959	30.2	15.8	10.9	5.0	2.4
Motor	17,737	30.5	15.8	10.5	5.3	1.9
50.1	11,291	22.9	12.5	8.3	4.2	1.5
50.2	2,898	54.7	25.9	18.5	7.5	3.1
50.3	2,046	31.9	20.3	12.2	8.1	1.9
50.4	258	28.4	17.3	8.6	8.6	4.0
50.5	1,327	25.5	14.2	9.7	4.5	2.5
Wholesale	68,411	28.2	13.6	9.3	4.3	2.3
51.1	602	88.7	50.8	24.6	26.2	3.7
51.2	5,869	20.0	12.1	7.8	4.2	1.8
51.3	13,113	27.3	10.3	7.9	2.4	2.4
51.4	14,459	31.1	16.8	11.5	5.3	1.7
51.5	23,210	25.8	10.6	6.6	4.1	1.8
51.6	11,551	32.6	19.4	14.2	5.2	2.3
51.7	2,270	16.9	6.0	4.6	1.4	13.2
Retail	32,812	34.2	20.8	14.5	6.3	2.8
52.1	10,229	25.7	16.3	12.1	4.1	2.8
52.2	2,328	24.6	18.1	9.0	9.1	1.6
52.3	2,623	35.1	23.9	15.1	8.7	2.3
52.4	16,403	38.3	23.5	16.7	6.8	3.1
52.5	110	55.8	30.2	16.2	14.0	3.0
52.6	1,094	47.9	17.3	12.9	4.4	2.2
52.7	137	83.0	45.7	34.8	10.9	4.5

(1) 1996 for NACE Rev. 1 G, 50, 51 and 52.

Source: SBS

NACE Rev. 1
50: sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel
50.1: sale of motor vehicles; 50.2: maintenance and repair of motor vehicles; 50.3: sale of motor vehicles parts and accessories; 50.4: sale, maintenance and repair of motorcycles and related parts and accessories; 50.5: retail sale of automotive fuel;

51: wholesale trade and commission trade, except of motor vehicles and motorcycles
51.1: wholesale on a fee or contract basis; 51.2: wholesale of agricultural raw materials and live animals; 51.3: wholesale of food, beverages and tobacco; 51.4: wholesale of household goods; 51.5: wholesale of non-agricultural intermediate products, waste and scrap; 51.6: wholesale of machinery, equipment and supplies; 51.7: other wholesale;

52: retail trade, except of motor vehicles and motorcycles; repair of personal and household goods
52.1: retail sale in non-specialised stores; 52.2: retail sale of food, beverages and tobacco in specialised stores; 52.3: retail sale of pharmaceuticals and medical goods, cosmetic and toilet articles; 52.4: other retail sale of new goods in specialised stores; 52.5: retail sale of second-hand goods in stores; 52.6: retail sale not in stores; 52.7: repair of personal and household goods.

Table 5.37

Enterprise and employment characteristics, 1995 (1)

NACE Rev. 1	Number of enterprises (units)	Number of persons employed (units)	Number of persons employed/enterprise (units)	Share of employees in the number of persons employed (%)	Personnel costs per employee (thousand ECU)
Total	67,886	521,433	7.68	90.3	28.0
Motor	8,071	74,873	9.28	92.0	27.2
50.1	1,900	31,643	17.25	96.1	30.7
50.2	3,128	25,091	8.31	90.8	23.5
50.3	803	8,883	11.63	94.4	29.7
50.4	251	1,007	4.66	82.5	26.7
50.5	1,989	8,145	4.04	77.2	20.5
Wholesale	20,901	190,945	9.14	94.3	35.8
51.1	5,209	7,825	1.77	50.3	37.7
51.2	1,125	17,456	15.52	95.2	27.6
51.3	1,768	35,577	21.25	96.8	29.9
51.4	4,556	47,171	10.98	95.9	36.8
51.5	3,165	43,148	14.44	97.0	36.4
51.6	4,176	40,080	10.25	95.7	42.9
51.7	902	3,293	4.40	92.8	34.0
Retail	38,914	255,615	6.57	86.8	21.7
52.1	5,187	64,407	12.30	91.9	21.0
52.2	5,207	16,024	3.09	69.4	18.7
52.3	2,194	19,735	10.12	90.2	22.3
52.4	22,298	141,773	6.67	87.1	22.1
52.5	1,090	1,941	1.86	48.1	19.1
52.6	1,791	7,220	4.14	75.7	25.9
52.7	1,147	3,079	2.82	70.2	22.0

(1) 1996, for number of enterprises and NACE Rev. 1 G, 50, 51 and 52 (excluding personnel costs).

Table 5.38

Productivity/competitiveness characteristics, 1995

NACE Rev. 1	Turnover per enterprise (thousand ECU) (1)	Turnover per person employed (thousand ECU) (1)	Value added per person employed (thousand ECU)	Gross operating surplus per person employed (thousand ECU)	Wage adjusted labour productivity (%)
Total	1,752.3	228.1	36.9	11.6	131.6
Motor	2,197.6	236.9	37.6	12.6	138.1
50.1	6,156.4	356.8	44.5	15.0	145.0
50.2	960.1	115.5	30.0	8.6	127.5
50.3	2,678.6	230.4	46.8	18.8	157.6
50.4	1,193.9	256.1	44.2	22.1	165.3
50.5	658.1	163.0	23.2	7.3	113.0
Wholesale	3,273.1	358.3	49.6	15.8	138.4
51.1	135.9	77.0	39.1	20.2	103.9
51.2	5,216.7	336.2	40.6	14.3	147.0
51.3	7,833.6	368.6	38.0	9.0	126.8
51.4	3,364.1	306.5	51.6	16.3	140.1
51.5	7,765.1	537.9	57.2	21.9	157.0
51.6	2,955.0	288.2	56.0	15.0	130.7
51.7	3,034.2	689.2	41.4	9.8	121.7
Retail	843.2	128.4	27.0	8.1	123.9
52.1	1,953.2	158.8	25.8	6.6	123.2
52.2	449.3	145.3	26.2	13.2	140.0
52.3	1,344.4	132.9	31.7	11.6	142.4
52.4	771.5	115.7	27.2	7.9	122.8
52.5	105.6	56.7	17.1	7.9	89.5
52.6	627.4	151.6	26.2	6.6	101.4
52.7	125.3	44.3	20.3	4.9	92.2

(1) 1996 for NACE Rev. 1 G, 50, 51 and 52.

Source: SBS

Table 5.39

Five leading groups in the retail food industry, 1997

	Total sales (million ECU)	Market share (%)	Food sales (million ECU)	Market share (%)
Modelo Continente	1,642	17.3	1,232	16.4
JMR	1,449	15.3	1,157	15.5
Pão de Açúcar (Auchan P)	795	8.4	596	8.0
Makro (Metro P)	635	6.7	476	6.4
ITM Iberica (Intermarché P)	450	4.7	405	5.4
Market leaders 1-5	4,971	52.4	3,867	51.7

Source: M+M Eurodata

Table 5.40

Main indicators as a share of turnover, 1996 (1) (%)

NACE Rev. 1	Turnover (million ECU)	Production value	Value added at factor cost	Personnel costs	Gross operating surplus	Gross investment in tangible goods
Total	95,596	:	10.8	7.0	4.2	4.8
Motor	20,243	:	9.0	6.3	3.3	1.0
50.1	11,738	:	7.5	:	3.1	:
50.2	2,118	:	22.2	:	6.4	:
50.3	1,886	:	13.4	:	5.0	:
50.4	783	:	10.0	:	4.3	:
50.5	3,717	:	4.0	:	1.0	:
Wholesale	47,856	:	10.1	6.4	4.2	7.3
51.1	4,004	:	12.0	:	5.6	:
51.2	3,034	:	4.5	:	2.1	:
51.3	11,266	:	6.4	:	1.8	:
51.4	11,655	:	11.6	:	4.8	:
51.5	10,033	:	9.6	:	4.7	:
51.6	5,057	:	16.5	:	6.7	:
51.7	2,808	:	12.1	:	5.6	:
Retail	27,497	:	13.2	8.6	4.9	2.9
52.1	7,036	:	11.5	:	4.8	:
52.2	2,939	:	10.4	:	3.7	:
52.3	2,281	:	18.4	:	9.3	:
52.4	14,426	:	13.7	:	4.4	:
52.5	64	:	12.1	:	2.5	:
52.6	477	:	11.9	:	7.0	:
52.7	272	:	28.0	:	11.7	:

(1) Personnel costs and gross investment, 1995.

Source: SBS

NACE Rev. 1
50: sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel
50.1: sale of motor vehicles; 50.2: maintenance and repair of motor vehicles; 50.3: sale of motor vehicles parts and accessories; 50.4: sale, maintenance and repair of motorcycles and related parts and accessories; 50.5: retail sale of automotive fuel;

51: wholesale trade and commission trade, except of motor vehicles and motorcycles
51.1: wholesale on a fee or contract basis; 51.2: wholesale of agricultural raw materials and live animals; 51.3: wholesale of food, beverages and tobacco; 51.4: wholesale of household goods; 51.5: wholesale of non-agricultural intermediate products, waste and scrap; 51.6: wholesale of machinery, equipment and supplies; 51.7: other wholesale;

52: retail trade, except of motor vehicles and motorcycles; repair of personal and household goods
52.1: retail sale in non-specialised stores; 52.2: retail sale of food, beverages and tobacco in specialised stores; 52.3: retail sale of pharmaceuticals and medical goods, cosmetic and toilet articles; 52.4: other retail sale of new goods in specialised stores; 52.5: retail sale of second-hand goods in stores; 52.6: retail sale not in stores; 52.7: repair of personal and household goods.

Table 5.41

Enterprise and employment characteristics, 1996

NACE Rev. 1	Number of enterprises (units)	Number of persons employed (units)	Number of persons employed/enterprise (units)	Share of employees in the number of persons employed (%)	Personnel costs per employee (thousand ECU) (1)
Total	199,025	768,958	3.86	82.2	9.3
Motor	28,164	137,992	4.90	86.9	9.1
50.1	4,540	44,638	9.83	95.0	:
50.2	14,935	52,782	3.53	79.2	:
50.3	3,447	17,611	5.11	92.0	:
50.4	3,174	7,924	2.50	66.7	:
50.5	2,068	15,037	7.27	94.6	:
Wholesale	52,702	259,537	4.92	88.1	12.2
51.1	18,568	37,256	2.01	58.1	:
51.2	2,544	9,649	3.79	80.3	:
51.3	7,598	55,276	7.28	93.8	:
51.4	9,909	66,814	6.74	93.3	:
51.5	6,455	39,405	6.10	92.9	:
51.6	4,260	34,336	8.06	96.9	:
51.7	3,368	16,801	4.99	90.3	:
Retail	118,159	371,429	3.14	76.3	7.0
52.1	13,674	69,016	5.05	83.2	:
52.2	22,487	50,326	2.24	61.7	:
52.3	4,628	20,650	4.46	88.3	:
52.4	60,685	207,702	3.42	81.4	:
52.5	603	1,140	1.89	59.1	:
52.6	8,425	10,540	1.25	18.5	:
52.7	7,657	12,055	1.57	41.9	:

(1) 1995.

Table 5.42

Productivity/competitiveness characteristics, 1996

NACE Rev. 1	Turnover per enterprise (thousand ECU)	Turnover per person employed (thousand ECU)	Value added per person employed (thousand ECU)	Gross operating surplus per person employed (thousand ECU)	Wage adjusted labour productivity (%)
Total	480.3	124.3	13.4	5.3	:
Motor	718.8	146.7	13.3	4.8	:
50.1	2,585.5	263.0	19.7	8.1	:
50.2	141.8	40.1	8.9	2.6	:
50.3	547.2	107.1	14.4	5.3	:
50.4	246.7	98.8	9.9	4.2	:
50.5	1,797.5	247.2	9.9	2.4	:
Wholesale	908.1	184.4	18.6	7.8	:
51.1	215.6	107.5	12.9	6.0	:
51.2	1,192.5	314.4	14.1	6.5	:
51.3	1,482.8	203.8	13.0	3.7	:
51.4	1,176.2	174.4	20.3	8.5	:
51.5	1,554.3	254.6	24.5	12.0	:
51.6	1,187.1	147.3	24.3	9.9	:
51.7	833.6	167.1	20.2	9.3	:
Retail	232.7	74.0	9.8	3.7	:
52.1	514.6	102.0	11.7	4.9	:
52.2	130.7	58.4	6.1	2.2	:
52.3	492.9	110.5	20.3	10.3	:
52.4	237.7	69.5	9.5	3.0	:
52.5	105.6	55.8	6.7	1.4	:
52.6	56.7	45.3	5.4	3.2	:
52.7	35.6	22.6	6.3	2.6	:

Source: SBS

Table 5.43

Five leading groups in the retail food industry, 1997

	Total sales (million ECU)	Market share (%)	Food sales (million ECU)	Market share (%)
Kesko	40,763	40.4	21,604	34.8
SOK	29,011	28.7	10,837	30.4
Stockmann	7,788	7.7	1,269	2.0
Tradeka	6,597	6.5	4,911	7.9
Rautakirja	5,645	5.6	1,976	3.2
Market leaders 1-5	89,804	88.9	40,597	65.5

Source: M+M Eurodata

Table 5.44

Main indicators as a share of turnover, 1997 (%)

NACE Rev. 1	Turnover (million ECU)	Production value	Value added at factor cost	Personnel costs	Gross operating surplus	Gross investment in tangible goods
Total	67,545	22.3	13.6	8.0	5.6	2.0
Motor	10,496	19.0	12.5	7.4	5.2	2.5
50.1	5,811	13.5	8.5	4.7	3.8	2.3
50.2	1,963	28.0	19.7	11.6	8.1	4.2
50.3	1,404	28.2	19.1	11.6	7.5	2.3
50.4	88	23.1	12.1	6.7	5.4	1.3
50.5	1,230	19.7	12.5	8.6	3.9	1.5
Wholesale	38,519	20.4	11.8	6.8	5.0	1.9
51.1	635	79.6	42.6	21.0	21.6	4.1
51.2	783	15.7	9.4	5.6	3.8	0.9
51.3	4,750	14.7	7.4	4.2	3.2	1.1
51.4	5,189	28.3	15.7	8.8	6.8	1.4
51.5	10,349	16.2	10.1	5.1	4.9	3.0
51.6	9,638	25.9	16.6	10.5	6.1	2.0
51.7	7,175	12.3	5.7	3.4	2.3	0.9
Retail	18,530	28.2	17.9	10.9	6.9	2.1
52.1	10,994	23.5	15.3	9.8	5.5	2.2
52.2	552	37.3	24.8	15.0	9.8	2.0
52.3	1,211	37.0	25.5	13.8	11.7	1.0
52.4	5,269	33.2	20.3	12.2	8.1	2.0
52.5	42	47.9	22.8	10.4	12.4	3.0
52.6	342	43.7	16.5	8.8	7.7	0.9
52.7	121	60.0	40.1	19.9	20.2	3.8

Source: SBS

NACE Rev. 1

50: sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel

50.1: sale of motor vehicles; 50.2: maintenance and repair of motor vehicles; 50.3: sale of motor vehicles parts and accessories; 50.4: sale, maintenance and repair of motorcycles and related parts and accessories; 50.5: retail sale of automotive fuel;

51: wholesale trade and commission trade, except of motor vehicles and motorcycles

51.1: wholesale on a fee or contract basis; 51.2: wholesale of agricultural raw materials and live animals; 51.3: wholesale of food, beverages and tobacco; 51.4: wholesale of household goods; 51.5: wholesale of non-agricultural intermediate products, waste and scrap; 51.6: wholesale of machinery, equipment and supplies; 51.7: other wholesale;

52: retail trade, except of motor vehicles and motorcycles; repair of personal and household goods

52.1: retail sale in non-specialised stores; 52.2: retail sale of food, beverages and tobacco in specialised stores; 52.3: retail sale of pharmaceuticals and medical goods, cosmetic and toilet articles; 52.4: other retail sale of new goods in specialised stores; 52.5: retail sale of second-hand goods in stores; 52.6: retail sale not in stores; 52.7: repair of personal and household goods.

Table 5.45

Enterprise and employment characteristics, 1997

NACE Rev. 1	Number of enterprises (units)	Number of persons employed (units)	Number of persons employed/enterprise (units)	Share of employees in the number of persons employed (%)	Personnel costs per employee (thousand ECU)
Total	48,451	211,293	4.36	89.6	28.6
Motor	8,752	31,236	3.57	86.0	28.9
50.1	1,344	8,472	6.30	94.6	34.0
50.2	4,627	10,372	2.24	79.5	27.7
50.3	1,380	6,256	4.53	90.6	28.8
50.4	162	314	1.94	72.9	25.9
50.5	1,239	5,822	4.70	80.6	22.4
Wholesale	16,102	79,613	4.94	93.3	35.3
51.1	3,929	5,101	1.30	73.0	35.8
51.2	308	1,553	5.04	91.4	30.9
51.3	1,128	6,839	6.06	94.9	30.4
51.4	3,649	14,862	4.07	91.6	33.7
51.5	2,649	16,421	6.20	94.3	34.4
51.6	3,945	27,142	6.88	95.7	39.0
51.7	494	7,695	15.58	98.4	32.4
Retail	23,597	100,444	4.26	87.9	22.9
52.1	4,588	49,559	10.80	94.8	22.9
52.2	1,360	3,335	2.45	78.7	31.6
52.3	1,208	7,416	6.14	89.9	25.0
52.4	13,360	35,976	2.69	81.6	21.9
52.5	688	629	0.91	39.1	18.0
52.6	862	1,517	1.76	84.1	23.6
52.7	1,531	2,012	1.31	56.3	21.3

Table 5.46

Productivity/competitiveness characteristics, 1997

NACE Rev. 1	Turnover per enterprise (thousand ECU)	Turnover per person employed (thousand ECU)	Value added per person employed (thousand ECU)	Gross operating surplus per person employed (thousand ECU)	Wage adjusted labour productivity (%)
Total	1,394.1	319.7	43.5	17.8	151.9
Motor	1,199.2	336.0	42.1	17.3	145.9
50.1	4,323.4	685.9	58.5	26.4	172.2
50.2	424.2	189.2	37.3	15.3	134.8
50.3	1,017.6	224.5	43.0	16.9	149.4
50.4	544.3	280.8	34.1	15.2	131.6
50.5	992.8	211.3	26.3	8.3	117.4
Wholesale	2,392.2	483.8	57.3	24.3	162.2
51.1	161.6	124.5	53.0	26.8	148.0
51.2	2,541.8	504.1	47.3	19.1	153.2
51.3	4,211.3	694.6	51.3	22.5	168.9
51.4	1,422.0	349.2	54.7	23.9	162.6
51.5	3,906.8	630.2	63.5	31.0	184.5
51.6	2,443.1	355.1	59.1	21.8	151.6
51.7	14,523.5	932.4	52.9	21.0	163.2
Retail	785.3	184.5	33.0	12.8	143.8
52.1	2,396.1	221.8	33.9	12.2	148.3
52.2	405.6	165.4	41.0	16.2	129.8
52.3	1,002.9	163.4	41.6	19.1	166.3
52.4	394.4	146.5	29.8	11.9	136.1
52.5	61.7	67.5	15.4	8.4	85.6
52.6	396.2	225.1	37.2	17.4	157.9
52.7	79.1	60.2	24.2	12.2	113.6

Source: SBS

Table 5.47

Five leading groups in the retail food industry, 1997

	Total sales (million ECU)	Market share (%)	Food sales (million ECU)	Market share (%)
ICA	7,199	37.5	6,695	42.0
KF	5,304	27.6	3,766	23.6
D-Gruppen	2,938	15.3	2,850	17.9
Axel Johnson	2,282	11.9	1,757	11.0
Bergendahl	478	2.5	383	2.4
Market leaders 1-5	18,201	94.8	15,450	96.8

Source: M+M Eurodata

Table 5.48

Main indicators as a share of turnover, 1996 (%)

NACE Rev. 1	Turnover (million ECU)	Production value	Value added at factor cost	Personnel costs	Gross operating surplus	Gross investment in tangible goods
Total	138,774	:	13.5	9.4	4.1	1.8
Motor	22,145	:	12.0	8.1	3.9	2.2
50.1	12,303	:	9.5	6.4	3.1	2.3
50.2	3,072	:	23.0	15.5	7.5	2.9
50.3	2,142	:	14.8	9.7	5.1	1.8
50.4	273	:	14.4	8.6	5.8	1.4
50.5	4,355	:	9.8	6.7	3.1	1.5
Wholesale	79,920	:	12.3	8.2	4.1	1.7
51.1	3,234	:	13.6	9.2	4.5	2.2
51.2	2,930	:	8.4	6.9	1.5	1.6
51.3	14,900	:	6.6	5.0	1.6	0.9
51.4	16,043	:	13.9	9.2	4.7	1.5
51.5	24,877	:	11.6	6.9	4.7	1.7
51.6	17,662	:	17.1	11.9	5.2	2.5
51.7	274	:	18.8	13.2	5.6	2.5
Retail	36,709	:	17.1	12.7	4.3	1.9
52.1	15,507	:	14.1	11.3	2.8	1.4
52.2	3,460	:	12.9	8.9	3.5	1.6
52.3	2,891	:	16.9	13.5	3.5	1.2
52.4	13,320	:	20.9	14.8	6.1	2.7
52.5	147	:	19.0	8.5	10.5	2.4
52.6	966	:	18.4	14.4	4.0	1.5
52.7	419	:	36.8	25.3	11.5	2.6

Source: SBS

NACE Rev. 1

50: sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel

50.1: sale of motor vehicles; 50.2: maintenance and repair of motor vehicles; 50.3: sale of motor vehicles parts and accessories; 50.4: sale, maintenance and repair of motorcycles and related parts and accessories; 50.5: retail sale of automotive fuel;

51: wholesale trade and commission trade, except of motor vehicles and motorcycles

51.1: wholesale on a fee or contract basis; 51.2: wholesale of agricultural raw materials and live animals; 51.3: wholesale of food, beverages and tobacco; 51.4: wholesale of household goods; 51.5: wholesale of non-agricultural intermediate products, waste and scrap; 51.6: wholesale of machinery, equipment and supplies; 51.7: other wholesale;

52: retail trade, except of motor vehicles and motorcycles; repair of personal and household goods

52.1: retail sale in non-specialised stores; 52.2: retail sale of food, beverages and tobacco in specialised stores; 52.3: retail sale of pharmaceuticals and medical goods, cosmetic and toilet articles; 52.4: other retail sale of new goods in specialised stores; 52.5: retail sale of second-hand goods in stores; 52.6: retail sale not in stores; 52.7: repair of personal and household goods.

Table 5.49

Enterprise and employment characteristics, 1996

NACE Rev. 1	Number of enterprises (units)	Number of persons employed (units)	Number of persons employed/enterprise (units)	Share of employees in the number of persons employed (%)	Personnel costs per employee (thousand ECU)
Total	112,743	:	:	:	33.5
Motor	17,641	:	:	:	31.9
50.1	3,751	:	:	:	33.9
50.2	9,444	:	:	:	29.7
50.3	1,600	:	:	:	35.0
50.4	563	:	:	:	28.8
50.5	2,283	:	:	:	28.8
Wholesale	39,661	:	:	:	39.4
51.1	3,070	:	:	:	38.9
51.2	868	:	:	:	34.0
51.3	3,531	:	:	:	36.4
51.4	11,197	:	:	:	38.7
51.5	10,567	:	:	:	38.8
51.6	10,004	:	:	:	42.8
51.7	424	:	:	:	30.6
Retail	55,441	:	:	:	28.0
52.1	7,159	:	:	:	27.4
52.2	7,316	:	:	:	27.7
52.3	922	:	:	:	36.8
52.4	33,498	:	:	:	27.1
52.5	1,305	:	:	:	20.9
52.6	2,115	:	:	:	32.3
52.7	3,126	:	:	:	30.6

Table 5.50

Productivity/competitiveness characteristics, 1996

NACE Rev. 1	Turnover per enterprise (thousand ECU)	Turnover per person employed (thousand ECU)	Value added per person employed (thousand ECU)	Gross operating surplus per person employed (thousand ECU)	Wage adjusted labour productivity (%)
Total	1,230.9	:	:	:	:
Motor	1,255.3	:	:	:	:
50.1	3,280.0	:	:	:	:
50.2	325.3	:	:	:	:
50.3	1,338.8	:	:	:	:
50.4	484.7	:	:	:	:
50.5	1,907.7	:	:	:	:
Wholesale	2,015.1	:	:	:	:
51.1	1,053.5	:	:	:	:
51.2	3,375.1	:	:	:	:
51.3	4,219.8	:	:	:	:
51.4	1,432.8	:	:	:	:
51.5	2,354.2	:	:	:	:
51.6	1,765.5	:	:	:	:
51.7	645.1	:	:	:	:
Retail	662.1	:	:	:	:
52.1	2,166.0	:	:	:	:
52.2	472.9	:	:	:	:
52.3	3,135.9	:	:	:	:
52.4	397.6	:	:	:	:
52.5	112.3	:	:	:	:
52.6	456.6	:	:	:	:
52.7	134.1	:	:	:	:

Source: SBS

Table 5.51

Five leading groups in the retail food industry, 1997

	Total sales (million ECU)	Market share (%)	Food sales (million ECU)	Market share (%)
Tesco	23,274	17.7	19,782	19.0
Sainsbury	19,761	15.0	16,797	16.1
Asda	11,860	9.0	9,488	9.1
Safeway	10,839	8.2	9,213	8.8
Somerfield	10,196	7.7	8,973	8.6
Market leaders 1-5	75,929	57.6	64,253	61.6

Source: M+M Eurodata

Table 5.52

Main indicators as a share of turnover, 1996 (%)

NACE Rev. 1	Turnover (million ECU)	Production value	Value added at factor cost	Personnel costs	Gross operating surplus	Gross investment in tangible goods
Total	791,579	:	:	6.8	:	1.7
Motor	131,610	:	:	6.0	:	0.8
50.1	93,042	:	:	4.6	:	0.8
50.2	9,995	:	:	17.3	:	0.9
50.3	12,175	:	:	10.6	:	1.0
50.4	1,234	:	:	7.1	:	1.1
50.5	15,165	:	:	3.1	:	0.3
Wholesale	422,521	:	:	5.2	:	1.1
51.1	9,233	:	:	9.7	:	1.8
51.2	8,882	:	:	2.9	:	0.7
51.3	73,818	:	:	4.3	:	1.0
51.4	62,320	:	:	7.0	:	1.2
51.5	167,146	:	:	2.9	:	0.8
51.6	61,213	:	:	9.8	:	1.9
51.7	39,909	:	:	5.5	:	1.1
Retail	237,447	:	:	10.2	:	3.2
52.1	110,169	:	:	9.4	:	3.7
52.2	17,896	:	:	9.0	:	1.1
52.3	9,061	:	:	10.3	:	1.6
52.4	86,616	:	:	11.3	:	3.5
52.5	1,857	:	:	7.5	:	1.1
52.6	11,310	:	:	10.0	:	1.6
52.7	538	:	:	34.9	:	3.4

Source: SBS

NACE Rev. 1

50: sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel

50.1: sale of motor vehicles; 50.2: maintenance and repair of motor vehicles; 50.3: sale of motor vehicles parts and accessories; 50.4: sale, maintenance and repair of motorcycles and related parts and accessories; 50.5: retail sale of automotive fuel;

51: wholesale trade and commission trade, except of motor vehicles and motorcycles

51.1: wholesale on a fee or contract basis; 51.2: wholesale of agricultural raw materials and live animals; 51.3: wholesale of food, beverages and tobacco; 51.4: wholesale of household goods; 51.5: wholesale of non-agricultural intermediate products, waste and scrap; 51.6: wholesale of machinery, equipment and supplies; 51.7: other wholesale;

52: retail trade, except of motor vehicles and motorcycles; repair of personal and household goods

52.1: retail sale in non-specialised stores; 52.2: retail sale of food, beverages and tobacco in specialised stores; 52.3: retail sale of pharmaceuticals and medical goods, cosmetic and toilet articles; 52.4: other retail sale of new goods in specialised stores; 52.5: retail sale of second-hand goods in stores; 52.6: retail sale not in stores; 52.7: repair of personal and household goods.

Table 5.53

Enterprise and employment characteristics, 1996

NACE Rev. 1	Number of enterprises (units)	Number of persons employed (units)	Number of persons employed/enterprise (units)	Share of employees in the number of persons employed (%)	Personnel costs per employee (thousand ECU)
Total	388,189	:	:	:	:
Motor	71,119	:	:	:	:
50.1	36,383	:	:	:	:
50.2	19,709	:	:	:	:
50.3	5,829	:	:	:	:
50.4	1,231	:	:	:	:
50.5	7,967	:	:	:	:
Wholesale	110,107	:	:	:	:
51.1	12,846	:	:	:	:
51.2	1,857	:	:	:	:
51.3	14,914	:	:	:	:
51.4	25,421	:	:	:	:
51.5	15,353	:	:	:	:
51.6	11,758	:	:	:	:
51.7	27,958	:	:	:	:
Retail	206,963	:	:	:	:
52.1	37,559	:	:	:	:
52.2	58,321	:	:	:	:
52.3	7,321	:	:	:	:
52.4	90,290	:	:	:	:
52.5	5,146	:	:	:	:
52.6	6,321	:	:	:	:
52.7	2,005	:	:	:	:

Table 5.54

Productivity/competitiveness characteristics, 1996

NACE Rev. 1	Turnover per enterprise (thousand ECU)	Turnover per person employed (thousand ECU)	Value added per person employed (thousand ECU)	Gross operating surplus per person employed (thousand ECU)	Wage adjusted labour productivity (%)
Total	2,039.2	:	:	:	:
Motor	1,850.6	:	:	:	:
50.1	2,557.3	:	:	:	:
50.2	507.1	:	:	:	:
50.3	2,088.7	:	:	:	:
50.4	1,002.2	:	:	:	:
50.5	1,903.4	:	:	:	:
Wholesale	3,837.4	:	:	:	:
51.1	718.8	:	:	:	:
51.2	4,782.9	:	:	:	:
51.3	4,949.6	:	:	:	:
51.4	2,451.5	:	:	:	:
51.5	10,886.9	:	:	:	:
51.6	5,206.1	:	:	:	:
51.7	1,427.5	:	:	:	:
Retail	1,147.3	:	:	:	:
52.1	2,933.2	:	:	:	:
52.2	306.9	:	:	:	:
52.3	1,237.7	:	:	:	:
52.4	959.3	:	:	:	:
52.5	360.8	:	:	:	:
52.6	1,789.3	:	:	:	:
52.7	268.4	:	:	:	:

Source: SBS

Table 5.55

Main indicators as a share of turnover, 1995 (%)

NACE Rev. 1	Turnover (million ECU)	Production value	Value added at factor cost	Personnel costs	Gross operating surplus	Gross investment in tangible goods
Total	:	:	:	:	:	:
Motor	:	:	:	:	:	:
50.1	:	:	:	:	:	:
50.2	:	:	:	:	:	:
50.3	:	:	:	:	:	:
50.4	:	:	:	:	:	:
50.5	:	:	:	:	:	:
Wholesale	1,610	:	17.3	:	:	:
51.1	:	:	:	:	:	:
51.2	:	:	:	:	:	:
51.3	:	:	:	:	:	:
51.4	:	:	:	:	:	:
51.5	:	:	:	:	:	:
51.6	:	:	:	:	:	:
51.7	:	:	:	:	:	:
Retail	:	:	:	:	:	:
52.1	:	:	:	:	:	:
52.2	:	:	:	:	:	:
52.3	:	:	:	:	:	:
52.4	:	:	:	:	:	:
52.5	:	:	:	:	:	:
52.6	:	:	:	:	:	:
52.7	:	:	:	:	:	:

Source: National Statistical Office

NACE Rev. 1

50: sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel
50.1: sale of motor vehicles; 50.2: maintenance and repair of motor vehicles; 50.3: sale of motor vehicles parts and accessories; 50.4: sale, maintenance and repair of motorcycles and related parts and accessories; 50.5: retail sale of automotive fuel;

51: wholesale trade and commission trade, except of motor vehicles and motorcycles
51.1: wholesale on a fee or contract basis; 51.2: wholesale of agricultural raw materials and live animals; 51.3: wholesale of food, beverages and tobacco; 51.4: wholesale of household goods; 51.5: wholesale of non-agricultural intermediate products, waste and scrap; 51.6: wholesale of machinery, equipment and supplies; 51.7: other wholesale;

52: retail trade, except of motor vehicles and motorcycles; repair of personal and household goods
52.1: retail sale in non-specialised stores; 52.2: retail sale of food, beverages and tobacco in specialised stores; 52.3: retail sale of pharmaceuticals and medical goods, cosmetic and toilet articles; 52.4: other retail sale of new goods in specialised stores; 52.5: retail sale of second-hand goods in stores; 52.6: retail sale not in stores; 52.7: repair of personal and household goods.

Table 5.56

Enterprise and employment characteristics, 1995

NACE Rev. 1	Number of enterprises (units)	Number of persons employed (units)	Number of persons employed/enterprise (units)	Share of employees in the number of persons employed (%)	Personnel costs per employee (thousand ECU)
Total	:	:	:	:	:
Motor	:	:	:	:	:
50.1	:	:	:	:	:
50.2	:	:	:	:	:
50.3	:	:	:	:	:
50.4	:	:	:	:	:
50.5	:	:	:	:	:
Wholesale	1,469	7,018	4.78	95.2	:
51.1	:	:	:	:	:
51.2	:	:	:	:	:
51.3	:	:	:	:	:
51.4	:	:	:	:	:
51.5	:	:	:	:	:
51.6	:	:	:	:	:
51.7	:	:	:	:	:
Retail	1,670	7,742	4.64	:	:
52.1	:	:	:	:	:
52.2	:	:	:	:	:
52.3	:	:	:	:	:
52.4	:	:	:	:	:
52.5	:	:	:	:	:
52.6	:	:	:	:	:
52.7	:	:	:	:	:

Table 5.57

Productivity/competitiveness characteristics, 1995

NACE Rev. 1	Turnover per enterprise (thousand ECU)	Turnover per person employed (thousand ECU)	Value added per person employed (thousand ECU)	Gross operating surplus per person employed (thousand ECU)	Wage adjusted labour productivity (%)
Total	:	:	:	:	:
Motor	:	:	:	:	:
50.1	:	:	:	:	:
50.2	:	:	:	:	:
50.3	:	:	:	:	:
50.4	:	:	:	:	:
50.5	:	:	:	:	:
Wholesale	1,095.8	229.4	39.6	:	:
51.1	:	:	:	:	:
51.2	:	:	:	:	:
51.3	:	:	:	:	:
51.4	:	:	:	:	:
51.5	:	:	:	:	:
51.6	:	:	:	:	:
51.7	:	:	:	:	:
Retail	:	:	:	:	:
52.1	:	:	:	:	:
52.2	:	:	:	:	:
52.3	:	:	:	:	:
52.4	:	:	:	:	:
52.5	:	:	:	:	:
52.6	:	:	:	:	:
52.7	:	:	:	:	:

Source: National Statistical Office

Table 5.58

Four leading groups in the retail food industry, 1997

	Total sales (million ECU)	Market share (%)	Food sales (million ECU)	Market share (%)
Norges Gruppen	3,569	31.8	3,319	32.8
Hakon	3,150	28.0	2,835	28.0
NKL	2,945	26.2	2,503	24.8
Reiten	1,366	12.2	1,298	12.8
Market leaders 1-4	11,030	98.2	9,956	98.5

Source: M+M Eurodata

Table 5.59

Main indicators as a share of turnover, 1996 (%)

NACE Rev. 1	Turnover (million ECU)	Production value	Value added at factor cost	Personnel costs	Gross operating surplus	Gross investment in tangible goods
Total	84,515	30.0	12.5	8.8	3.7	:
Motor	16,184	23.1	10.5	7.4	3.1	:
50.1	10,125	17.9	8.6	5.6	3.0	:
50.2	1,809	51.8	18.3	14.0	4.4	:
50.3	1,103	34.0	17.0	11.8	5.2	:
50.4	103	24.0	12.7	8.9	3.8	:
50.5	3,044	19.2	9.6	8.0	1.6	:
Wholesale	46,458	31.2	11.1	7.4	3.7	:
51.1	427	79.8	29.1	18.2	10.9	:
51.2	2,514	52.3	10.6	6.4	4.1	:
51.3	12,758	17.5	5.8	3.8	2.0	:
51.4	7,594	30.4	13.3	8.6	4.7	:
51.5	12,008	39.9	9.6	5.9	3.7	:
51.6	10,475	31.2	16.5	12.1	4.4	:
51.7	682	35.1	17.0	13.0	4.0	:
Retail	21,873	32.6	17.1	12.6	4.4	:
52.1	10,398	27.6	14.0	10.0	4.0	:
52.2	1,117	22.8	14.1	10.6	3.5	:
52.3	980	29.4	20.7	17.5	3.2	:
52.4	8,835	38.6	20.4	15.5	4.9	:
52.5	39	53.1	25.9	13.5	12.4	:
52.6	372	50.3	15.9	9.1	6.8	:
52.7	132	86.3	32.5	21.6	10.9	:

Source: National Statistical Office

NACE Rev. 1

50: sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel
50.1: sale of motor vehicles; 50.2: maintenance and repair of motor vehicles; 50.3: sale of motor vehicles parts and accessories; 50.4: sale, maintenance and repair of motorcycles and related parts and accessories; 50.5: retail sale of automotive fuel;

51: wholesale trade and commission trade, except of motor vehicles and motorcycles
51.1: wholesale on a fee or contract basis; 51.2: wholesale of agricultural raw materials and live animals; 51.3: wholesale of food, beverages and tobacco; 51.4: wholesale of household goods; 51.5: wholesale of non-agricultural intermediate products, waste and scrap; 51.6: wholesale of machinery, equipment and supplies; 51.7: other wholesale;

52: retail trade, except of motor vehicles and motorcycles; repair of personal and household goods
52.1: retail sale in non-specialised stores; 52.2: retail sale of food, beverages and tobacco in specialised stores; 52.3: retail sale of pharmaceuticals and medical goods, cosmetic and toilet articles; 52.4: other retail sale of new goods in specialised stores; 52.5: retail sale of second-hand goods in stores; 52.6: retail sale not in stores; 52.7: repair of personal and household goods.

Table 5.60

Enterprise and employment characteristics, 1996

NACE Rev. 1	Number of enterprises (units)	Number of persons employed (units)	Number of persons employed/enterprise (units)	Share of employees in the number of persons employed (%)	Personnel costs per employee (thousand ECU)
Total	57,506	323,901	5.63	91.4	25.0
Motor	8,110	50,333	6.21	92.1	26.0
50.1	2,073	18,414	8.88	96.1	32.2
50.2	3,106	12,099	3.90	83.5	25.0
50.3	989	4,786	4.84	91.2	29.7
50.4	189	482	2.55	78.6	24.3
50.5	1,753	14,552	8.30	95.1	17.6
Wholesale	17,594	107,289	6.10	94.8	33.8
51.1	2,009	3,841	1.91	74.4	27.2
51.2	413	4,997	12.10	96.9	33.5
51.3	1,645	15,916	9.68	96.9	31.4
51.4	4,078	21,564	5.29	94.0	32.2
51.5	2,750	21,487	7.81	96.4	34.2
51.6	5,537	36,142	6.53	96.1	36.4
51.7	1,162	3,342	2.88	86.7	30.6
Retail	31,802	166,279	5.23	89.0	18.7
52.1	6,254	63,569	10.16	94.9	17.2
52.2	2,653	8,720	3.29	76.8	17.8
52.3	1,198	7,554	6.31	88.5	25.6
52.4	17,977	79,747	4.44	88.9	19.3
52.5	552	761	1.38	34.8	19.8
52.6	1,543	3,319	2.15	58.5	17.5
52.7	1,625	2,609	1.61	45.9	23.8

Table 5.61

Productivity/competitiveness characteristics, 1996

NACE Rev. 1	Turnover per enterprise (thousand ECU)	Turnover per person employed (thousand ECU)	Value added per person employed (thousand ECU)	Gross operating surplus per person employed (thousand ECU)	Wage adjusted labour productivity (%)
Total	1,469.7	260.9	32.6	9.8	130.5
Motor	1,995.5	321.5	33.7	9.8	129.9
50.1	4,884.1	549.8	47.4	16.5	147.2
50.2	582.4	149.5	27.4	6.5	109.6
50.3	1,115.0	230.4	39.2	12.1	131.8
50.4	547.1	214.5	27.2	8.2	112.2
50.5	1,736.4	209.2	20.1	3.5	114.8
Wholesale	2,640.6	433.0	47.9	15.9	141.7
51.1	212.5	111.2	32.4	12.2	119.2
51.2	6,087.6	503.1	53.2	20.7	158.7
51.3	7,755.6	801.6	46.8	16.4	149.1
51.4	1,862.3	352.2	46.7	16.5	145.2
51.5	4,366.5	558.8	53.8	20.8	157.1
51.6	1,891.7	289.8	47.8	12.7	131.1
51.7	586.8	204.0	34.7	8.2	113.5
Retail	687.8	131.5	22.5	5.8	120.3
52.1	1,662.6	163.6	22.9	6.6	133.5
52.2	421.2	128.1	18.1	4.5	102.0
52.3	818.4	129.8	26.9	4.2	104.9
52.4	491.4	110.8	22.6	5.5	117.2
52.5	70.5	51.1	13.2	6.3	66.7
52.6	240.9	112.0	17.8	7.6	101.7
52.7	81.0	50.5	16.4	5.5	68.9

Source: National Statistical Office

Table 5.62

Main indicators as a share of turnover, 1995 (1) (%)

NACE Rev. 1	Turnover (million ECU)	Production value	Value added at factor cost	Personnel costs	Gross operating surplus	Gross investment in tangible goods
Total	391	21.9	:	2.2	:	3.3
Motor	47	17.4	:	2.5	:	3.6
50.1	0	:	:	:	:	0.0
50.2	0	:	:	:	:	23.3
50.3	8	:	:	:	:	9.7
50.4	0	:	:	:	:	0.0
50.5	25	:	:	:	:	2.5
Wholesale	248	19.8	:	1.8	:	3.5
51.1	2	:	:	:	:	0.0
51.2	2	:	:	:	:	20.2
51.3	45	:	:	:	:	3.2
51.4	18	:	:	:	:	4.1
51.5	76	:	:	:	:	5.7
51.6	2	:	:	:	:	4.5
51.7	14	:	:	:	:	2.0
Retail	96	29.7	:	3.1	:	2.4
52.1	43	:	:	:	:	5.6
52.2	50	:	:	:	:	6.1
52.3	24	:	:	:	:	3.1
52.4	59	:	:	:	:	14.4
52.5	0	:	:	:	:	53.3
52.6	6	:	:	:	:	1.5
52.7	:	:	:	:	:	:

(1) NACE Rev. 1 Section G, Divisions 50, 51 and 52, 1997.

Source: National Statistical Office

NACE Rev. 1

50: sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel

50.1: sale of motor vehicles; 50.2: maintenance and repair of motor vehicles; 50.3: sale of motor vehicles parts and accessories; 50.4: sale, maintenance and repair of motorcycles and related parts and accessories; 50.5: retail sale of automotive fuel;

51: wholesale trade and commission trade, except of motor vehicles and motorcycles

51.1: wholesale on a fee or contract basis; 51.2: wholesale of agricultural raw materials and live animals; 51.3: wholesale of food, beverages and tobacco; 51.4: wholesale of household goods; 51.5: wholesale of non-agricultural intermediate products, waste and scrap; 51.6: wholesale of machinery, equipment and supplies; 51.7: other wholesale;

52: retail trade, except of motor vehicles and motorcycles; repair of personal and household goods

52.1: retail sale in non-specialised stores; 52.2: retail sale of food, beverages and tobacco in specialised stores; 52.3: retail sale of pharmaceuticals and medical goods, cosmetic and toilet articles; 52.4: other retail sale of new goods in specialised stores; 52.5: retail sale of second-hand goods in stores; 52.6: retail sale not in stores; 52.7: repair of personal and household goods.

Table 5.63

Enterprise and employment characteristics, 1995 (1)

NACE Rev. 1	Number of enterprises (units)	Number of persons employed (units)	Number of persons employed/enterprise (units)	Share of employees in the number of persons employed (%)	Personnel costs per employee (thousand ECU)
Total	14,046	24,486	1.74	15.2	2.3
Motor	752	2,400	3.19	67.0	0.7
50.1	8	24	3.00	8.3	:
50.2	139	142	1.02	32.4	:
50.3	167	496	2.97	51.2	:
50.4	2	4	2.00	:	:
50.5	158	507	3.21	62.5	:
Wholesale	2,136	7,286	3.41	6.3	9.8
51.1	65	142	2.18	11.3	:
51.2	81	386	4.77	31.3	:
51.3	875	2,216	2.53	31.0	:
51.4	277	898	3.24	45.8	:
51.5	520	1,798	3.46	42.7	:
51.6	63	223	3.54	63.7	:
51.7	372	721	1.94	26.5	:
Retail	11,158	14,800	1.33	11.1	1.8
52.1	5,036	9,901	1.97	37.3	:
52.2	3,836	6,789	1.77	10.4	:
52.3	1,001	2,317	2.31	32.6	:
52.4	2,689	4,786	1.78	19.9	:
52.5	85	112	1.32	:	:
52.6	1,608	1,663	1.03	:	:
52.7	1,316	1,592	1.21	:	:

(1) NACE Rev. 1 Section G, Divisions 50, 51 and 52, 1997.

Table 5.64

Productivity/competitiveness characteristics, 1995 (1)

NACE Rev. 1	Turnover per enterprise (thousand ECU)	Turnover per person employed (thousand ECU)	Value added per person employed (thousand ECU)	Gross operating surplus per person employed (thousand ECU)	Wage adjusted labour productivity (%)
Total	27.9	16.0	:	:	:
Motor	62.8	19.7	:	:	:
50.1	6.3	2.1	:	:	:
50.2	2.2	2.1	:	:	:
50.3	45.4	15.3	:	:	:
50.4	15.0	7.5	:	:	:
50.5	160.8	50.1	:	:	:
Wholesale	116.2	34.1	:	:	:
51.1	36.2	16.5	:	:	:
51.2	23.8	5.0	:	:	:
51.3	51.1	20.2	:	:	:
51.4	65.1	20.1	:	:	:
51.5	145.8	42.2	:	:	:
51.6	38.6	10.9	:	:	:
51.7	38.6	19.9	:	:	:
Retail	8.6	6.5	:	:	:
52.1	8.5	4.3	:	:	:
52.2	13.2	7.4	:	:	:
52.3	23.8	10.3	:	:	:
52.4	21.9	12.3	:	:	:
52.5	1.8	1.3	:	:	:
52.6	3.8	3.7	:	:	:
52.7	:	:	:	:	:

(1) NACE Rev. 1 Section G, Divisions 50, 51 and 52, 1997.

Source: National Statistical Office

Table 5.65

Main indicators as a share of turnover, 1997 (%)

NACE Rev. 1	Turnover (million ECU)	Production value	Value added at factor cost	Personnel costs	Gross operating surplus	Gross investment in tangible goods
Total	6,602	17.9	:	:	5.4	1.5
Motor	668	19.1	:	:	5.5	3.3
50.1	88	34.8	:	:	14.2	4.1
50.2	16	:	:	:	9.5	3.5
50.3	118	23.8	:	:	8.7	2.7
50.4	2	35.6	:	:	5.5	1.2
50.5	444	12.1	:	:	2.8	3.2
Wholesale	4,957	16.0	:	:	5.5	1.3
51.1	164	74.9	:	:	31.8	5.8
51.2	276	19.7	:	:	4.1	1.6
51.3	814	16.2	:	:	4.1	1.0
51.4	425	22.9	:	:	6.0	1.3
51.5	2,793	9.2	:	:	4.3	1.0
51.6	307	27.1	:	:	6.4	1.5
51.7	179	26.3	:	:	6.3	2.4
Retail	977	26.3	:	:	5.1	1.3
52.1	424	27.6	:	:	4.0	0.9
52.2	91	24.9	:	:	3.3	1.4
52.3	80	22.2	:	:	5.0	0.8
52.4	335	23.8	:	:	6.2	2.0
52.5	3	47.1	:	:	16.3	7.1
52.6	34	27.5	:	:	8.1	0.9
52.7	10	:	:	:	17.0	2.3

Source: National Statistical Office

NACE Rev. 1

50: sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel
50.1: sale of motor vehicles; 50.2: maintenance and repair of motor vehicles; 50.3: sale of motor vehicles parts and accessories; 50.4: sale, maintenance and repair of motorcycles and related parts and accessories; 50.5: retail sale of automotive fuel;

51: wholesale trade and commission trade, except of motor vehicles and motorcycles
51.1: wholesale on a fee or contract basis; 51.2: wholesale of agricultural raw materials and live animals; 51.3: wholesale of food, beverages and tobacco; 51.4: wholesale of household goods; 51.5: wholesale of non-agricultural intermediate products, waste and scrap; 51.6: wholesale of machinery, equipment and supplies; 51.7: other wholesale;

52: retail trade, except of motor vehicles and motorcycles; repair of personal and household goods
52.1: retail sale in non-specialised stores; 52.2: retail sale of food, beverages and tobacco in specialised stores; 52.3: retail sale of pharmaceuticals and medical goods, cosmetic and toilet articles; 52.4: other retail sale of new goods in specialised stores; 52.5: retail sale of second-hand goods in stores; 52.6: retail sale not in stores; 52.7: repair of personal and household goods.

Table 5.66

Enterprise and employment characteristics, 1997

NACE Rev. 1	Number of enterprises (units)	Number of persons employed (units)	Number of persons employed/enterprise (units)	Share of employees in the number of persons employed (%)	Personnel costs per employee (thousand ECU)
Total	97,269	289,511	2.98	61.4	:
Motor	5,034	24,882	4.94	76.1	:
50.1	189	2,681	14.19	86.3	:
50.2	1,923	6,019	3.13	62.5	:
50.3	2,358	7,197	3.05	63.2	:
50.4	76	180	2.37	44.4	:
50.5	488	8,805	18.04	93.4	:
Wholesale	22,020	96,920	4.40	73.7	:
51.1	2,488	8,156	3.28	65.9	:
51.2	1,450	6,564	4.53	71.0	:
51.3	5,688	23,897	4.20	72.9	:
51.4	4,066	16,819	4.14	72.2	:
51.5	4,622	24,886	5.38	78.6	:
51.6	1,662	8,204	4.94	75.4	:
51.7	2,044	8,394	4.11	72.3	:
Retail	70,215	167,709	2.39	52.1	:
52.1	25,885	70,660	2.73	57.2	:
52.2	8,335	19,184	2.30	49.4	:
52.3	3,440	10,081	2.93	62.5	:
52.4	17,583	46,594	2.65	56.8	:
52.5	558	1,360	2.44	54.6	:
52.6	12,110	15,376	1.27	12.7	:
52.7	2,304	4,454	1.93	43.7	:

Table 5.67

Productivity/competitiveness characteristics, 1997

NACE Rev. 1	Turnover per enterprise (thousand ECU)	Turnover per person employed (thousand ECU)	Value added per person employed (thousand ECU)	Gross operating surplus per person employed (thousand ECU)	Wage adjusted labour productivity (%)
Total	67.9	22.8	:	1.2	:
Motor	132.7	26.8	:	1.5	:
50.1	464.5	32.7	:	4.7	:
50.2	8.3	2.6	:	0.3	:
50.3	50.2	16.4	:	1.4	:
50.4	21.4	9.1	:	0.5	:
50.5	910.4	50.5	:	1.4	:
Wholesale	225.1	51.1	:	2.8	:
51.1	66.0	20.1	:	6.4	:
51.2	190.1	42.0	:	1.7	:
51.3	143.0	34.0	:	1.4	:
51.4	104.5	25.3	:	1.5	:
51.5	604.2	112.2	:	4.8	:
51.6	184.6	37.4	:	2.4	:
51.7	87.7	21.4	:	1.3	:
Retail	13.9	5.8	:	0.3	:
52.1	16.4	6.0	:	0.2	:
52.2	10.9	4.7	:	0.2	:
52.3	23.2	7.9	:	0.4	:
52.4	19.1	7.2	:	0.4	:
52.5	5.8	2.4	:	0.4	:
52.6	2.8	2.2	:	0.2	:
52.7	4.5	2.3	:	0.4	:

Source: National Statistical Office

Table 5.68

Main indicators as a share of turnover, 1997 (%)

NACE Rev. 1	Turnover (million ECU)	Production value	Value added at factor cost	Personnel costs	Gross operating surplus	Gross investment in tangible goods
Total	5,941	24.1	16.8	9.8	7.0	2.9
Motor	953	26.1	16.7	9.6	7.1	1.6
50.1	:	:	:	:	:	:
50.2	:	:	:	:	:	:
50.3	:	:	:	:	:	:
50.4	:	:	:	:	:	:
50.5	:	:	:	:	:	:
Wholesale	2,541	23.0	16.4	9.5	6.9	2.8
51.1	101	89.6	49.8	35.6	14.2	14.0
51.2 (1)	85	:	9.9	7.3	2.6	3.6
51.3	915	17.7	12.8	7.6	5.2	1.3
51.4	617	27.6	19.7	11.3	8.4	3.1
51.5	666	21.3	13.1	6.1	7.0	2.3
51.6	96	31.2	22.0	11.9	10.1	4.9
51.7	:	:	:	:	:	:
Retail	2,447	24.4	17.1	10.1	7.0	3.5
52.1	897	14.1	10.3	6.4	3.9	4.1
52.2	184	19.5	13.5	8.1	5.4	2.0
52.3	69	24.1	17.3	11.2	6.1	1.6
52.4	1,154	31.9	21.9	12.6	9.3	3.7
52.5	:	:	:	:	:	:
52.6	111	21.8	15.2	11.0	4.2	0.7
52.7	28	88.9	65.6	30.8	34.9	1.7

(1) Excluding NACE Rev. 1 51.25.

Source: National Statistical Office

NACE Rev. 1
50: sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel
50.1: sale of motor vehicles; 50.2: maintenance and repair of motor vehicles; 50.3: sale of motor vehicles parts and accessories; 50.4: sale, maintenance and repair of motorcycles and related parts and accessories; 50.5: retail sale of automotive fuel;

51: wholesale trade and commission trade, except of motor vehicles and motorcycles
51.1: wholesale on a fee or contract basis; 51.2: wholesale of agricultural raw materials and live animals; 51.3: wholesale of food, beverages and tobacco; 51.4: wholesale of household goods; 51.5: wholesale of non-agricultural intermediate products, waste and scrap; 51.6: wholesale of machinery, equipment and supplies; 51.7: other wholesale;

52: retail trade, except of motor vehicles and motorcycles; repair of personal and household goods
52.1: retail sale in non-specialised stores; 52.2: retail sale of food, beverages and tobacco in specialised stores; 52.3: retail sale of pharmaceuticals and medical goods, cosmetic and toilet articles; 52.4: other retail sale of new goods in specialised stores; 52.5: retail sale of second-hand goods in stores; 52.6: retail sale not in stores; 52.7: repair of personal and household goods.

Table 5.69

Enterprise and employment characteristics, 1997

NACE Rev. 1	Number of enterprises (units)	Number of persons employed (units)	Number of persons employed/enterprise (units)	Share of employees in the number of persons employed (%)	Personnel costs per employee (thousand ECU)
Total	:	52,056	:	81.9	13.6
Motor	:	7,959	:	75.1	15.3
50.1	:	:	:	:	:
50.2	:	:	:	:	:
50.3	:	:	:	:	:
50.4	:	:	:	:	:
50.5	:	:	:	:	:
Wholesale	:	17,699	:	96.3	14.2
51.1	:	1,922	:	96.0	19.4
51.2 (1)	:	296	:	96.3	21.8
51.3	:	5,270	:	94.2	14.1
51.4	:	5,871	:	98.2	12.1
51.5	:	2,821	:	95.2	15.1
51.6	:	917	:	99.5	12.6
51.7	:	:	:	:	:
Retail	:	26,398	:	74.3	12.6
52.1	:	6,580	:	71.6	12.1
52.2	:	1,587	:	60.1	15.6
52.3	:	821	:	82.1	11.5
52.4	:	15,135	:	82.8	11.6
52.5	:	:	:	:	:
52.6	:	1,266	:	23.7	40.7
52.7	:	916	:	44.5	21.3

(1) Excluding NACE Rev. 1 51.25.

Table 5.70

Productivity/competitiveness characteristics, 1997

NACE Rev. 1	Turnover per enterprise (thousand ECU)	Turnover per person employed (thousand ECU)	Value added per person employed (thousand ECU)	Gross operating surplus per person employed (thousand ECU)	Wage adjusted labour productivity (%)
Total	:	114.1	19.1	8.0	140.6
Motor	:	119.8	20.0	8.5	130.8
50.1	:	:	:	:	:
50.2	:	:	:	:	:
50.3	:	:	:	:	:
50.4	:	:	:	:	:
50.5	:	:	:	:	:
Wholesale	:	143.6	23.6	10.0	166.6
51.1	:	52.3	26.1	7.5	134.3
51.2 (1)	:	288.4	28.4	7.4	130.4
51.3	:	173.6	22.2	9.0	158.2
51.4	:	105.0	20.7	8.8	170.8
51.5	:	236.2	30.9	16.5	204.9
51.6	:	104.9	23.0	10.5	183.1
51.7	:	:	:	:	:
Retail	:	92.7	15.8	6.5	125.9
52.1	:	136.3	14.0	5.3	115.6
52.2	:	115.8	15.6	6.2	99.8
52.3	:	84.1	14.6	5.1	126.6
52.4	:	76.3	16.7	7.1	143.7
52.5	:	:	:	:	:
52.6	:	87.6	13.3	3.7	32.7
52.7	:	30.9	20.3	10.8	94.9

(1) Excluding NACE Rev. 1 51.25.

Source: National Statistical Office

Table 5.71

Five leading groups in the retail food industry, 1997

	Total sales (million ECU)	Market share (%)	Food sales (million ECU)	Market share (%)
Interkontakt Group	439	7.2	311	6.0
Euronova (Ahold CZ)	235	3.9	211	4.1
Plus (Tengelmann CZ)	187	3.1	138	2.7
Delvita (Delhaize CZ)	169	2.8	152	3.0
Meinl (CZ)	161	2.6	137	2.6
Market leaders 1-5	1,191	19.6	949	18.4

Source: M+M Eurodata

Table 5.72

Main indicators as a share of turnover, 1997 (%)

NACE Rev. 1	Turnover (million ECU)	Production value	Value added at factor cost	Personnel costs	Gross operating surplus	Gross investment in tangible goods
Total	53,778	:	:	:	:	3.6
Motor	6,755	:	:	:	:	5.0
50.1	:	:	:	:	:	:
50.2	:	:	:	:	:	:
50.3	:	:	:	:	:	:
50.4	:	:	:	:	:	:
50.5	:	:	:	:	:	:
Wholesale	30,625	:	:	:	:	2.5
51.1	:	:	:	:	:	:
51.2	:	:	:	:	:	:
51.3	:	:	:	:	:	:
51.4	:	:	:	:	:	:
51.5	:	:	:	:	:	:
51.6	:	:	:	:	:	:
51.7	:	:	:	:	:	:
Retail	16,399	:	:	:	:	5.1
52.1	:	:	:	:	:	:
52.2	:	:	:	:	:	:
52.3	:	:	:	:	:	:
52.4	:	:	:	:	:	:
52.5	:	:	:	:	:	:
52.6	:	:	:	:	:	:
52.7	:	:	:	:	:	:

Source: National Statistical Office

NACE Rev. 1
50: sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel
50.1: sale of motor vehicles; 50.2: maintenance and repair of motor vehicles; 50.3: sale of motor vehicles parts and accessories; 50.4: sale, maintenance and repair of motorcycles and related parts and accessories; 50.5: retail sale of automotive fuel;

51: wholesale trade and commission trade, except of motor vehicles and motorcycles
51.1: wholesale on a fee or contract basis; 51.2: wholesale of agricultural raw materials and live animals; 51.3: wholesale of food, beverages and tobacco; 51.4: wholesale of household goods; 51.5: wholesale of non-agricultural intermediate products, waste and scrap; 51.6: wholesale of machinery, equipment and supplies; 51.7: other wholesale;

52: retail trade, except of motor vehicles and motorcycles; repair of personal and household goods
52.1: retail sale in non-specialised stores; 52.2: retail sale of food, beverages and tobacco in specialised stores; 52.3: retail sale of pharmaceuticals and medical goods, cosmetic and toilet articles; 52.4: other retail sale of new goods in specialised stores; 52.5: retail sale of second-hand goods in stores; 52.6: retail sale not in stores; 52.7: repair of personal and household goods.

Table 5.73

Enterprise and employment characteristics, 1997

NACE Rev. 1	Number of enterprises (units)	Number of persons employed (units)	Number of persons employed/enterprise (units)	Share of employees in the number of persons employed (%)	Personnel costs per employee (thousand ECU)
Total	520,203	751,411	1.44	69.4	:
Motor	28,519	74,432	2.61	75.1	:
50.1	1,641	:	:	:	:
50.2	25,430	:	:	:	:
50.3	507	:	:	:	:
50.4	75	:	:	:	:
50.5	866	:	:	:	:
Wholesale	170,318	240,489	1.41	75.8	:
51.1	107,556	:	:	:	:
51.2	407	:	:	:	:
51.3	2,558	:	:	:	:
51.4	2,937	:	:	:	:
51.5	1,770	:	:	:	:
51.6	1,184	:	:	:	:
51.7	53,906	:	:	:	:
Retail	321,366	436,490	1.36	64.9	:
52.1	232,882	:	:	:	:
52.2	5,136	:	:	:	:
52.3	2,440	:	:	:	:
52.4	45,172	:	:	:	:
52.5	1,563	:	:	:	:
52.6	26,634	:	:	:	:
52.7	7,539	:	:	:	:

Table 5.74

Productivity/competitiveness characteristics, 1997

NACE Rev. 1	Turnover per enterprise (thousand ECU)	Turnover per person employed (thousand ECU)	Value added per person employed (thousand ECU)	Gross operating surplus per person employed (thousand ECU)	Wage adjusted labour productivity (%)
Total	103.4	71.6	:	:	:
Motor	236.9	90.8	:	:	:
50.1	:	:	:	:	:
50.2	:	:	:	:	:
50.3	:	:	:	:	:
50.4	:	:	:	:	:
50.5	:	:	:	:	:
Wholesale	179.8	127.3	:	:	:
51.1	:	:	:	:	:
51.2	:	:	:	:	:
51.3	:	:	:	:	:
51.4	:	:	:	:	:
51.5	:	:	:	:	:
51.6	:	:	:	:	:
51.7	:	:	:	:	:
Retail	51.0	37.6	:	:	:
52.1	:	:	:	:	:
52.2	:	:	:	:	:
52.3	:	:	:	:	:
52.4	:	:	:	:	:
52.5	:	:	:	:	:
52.6	:	:	:	:	:
52.7	:	:	:	:	:

Source: National Statistical Office

Table 5.75

Main indicators as a share of turnover, 1997 (%)

NACE Rev. 1	Turnover (million ECU)	Production value	Value added at factor cost	Personnel costs	Gross operating surplus	Gross investment in tangible goods
Total	4,791	22.6	8.3	5.0	3.4	2.9
Motor	725	20.5	8.0	4.6	3.4	4.6
50.1	389	:	:	:	:	:
50.2	59	:	:	:	:	:
50.3	:	:	:	:	:	:
50.4	:	:	:	:	:	:
50.5	277	:	:	:	:	:
Wholesale	2,949	22.7	7.4	4.0	3.4	2.3
51.1	71	:	:	:	:	:
51.2	30	:	:	:	:	:
51.3	715	:	:	:	:	:
51.4	414	:	:	:	:	:
51.5	837	:	:	:	:	:
51.6	234	:	:	:	:	:
51.7	647	:	:	:	:	:
Retail	1,118	23.4	11.0	7.8	3.2	3.5
52.1	563	:	:	:	:	:
52.2	30	:	:	:	:	:
52.3	58	:	:	:	:	:
52.4	:	:	:	:	:	:
52.5	:	:	:	:	:	:
52.6	:	:	:	:	:	:
52.7	:	:	:	:	:	:

Source: National Statistical Office

NACE Rev. 1
50: sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel
50.1: sale of motor vehicles; 50.2: maintenance and repair of motor vehicles; 50.3: sale of motor vehicles parts and accessories; 50.4: sale, maintenance and repair of motorcycles and related parts and accessories; 50.5: retail sale of automotive fuel;

51: wholesale trade and commission trade, except of motor vehicles and motorcycles
51.1: wholesale on a fee or contract basis; 51.2: wholesale of agricultural raw materials and live animals; 51.3: wholesale of food, beverages and tobacco; 51.4: wholesale of household goods; 51.5: wholesale of non-agricultural intermediate products, waste and scrap; 51.6: wholesale of machinery, equipment and supplies; 51.7: other wholesale;

52: retail trade, except of motor vehicles and motorcycles; repair of personal and household goods
52.1: retail sale in non-specialised stores; 52.2: retail sale of food, beverages and tobacco in specialised stores; 52.3: retail sale of pharmaceuticals and medical goods, cosmetic and toilet articles; 52.4: other retail sale of new goods in specialised stores; 52.5: retail sale of second-hand goods in stores; 52.6: retail sale not in stores; 52.7: repair of personal and household goods.

Table 5.76

Enterprise and employment characteristics, 1997

NACE Rev. 1	Number of enterprises (units)	Number of persons employed (units)	Number of persons employed/enterprise (units)	Share of employees in the number of persons employed (%)	Personnel costs per employee (thousand ECU)
Total	11,563	:	:	:	3.0
Motor	1,142	:	:	:	3.6
50.1	:	:	:	:	:
50.2	:	:	:	:	:
50.3	:	:	:	:	:
50.4	:	:	:	:	:
50.5	:	:	:	:	:
Wholesale	6,895	33,380	4.98	:	3.4
51.1	:	1,951	:	:	:
51.2	:	576	:	:	:
51.3	:	3,895	:	:	:
51.4	:	3,704	:	:	:
51.5	:	4,120	:	:	:
51.6	:	1,747	:	:	:
51.7	:	17,387	:	:	:
Retail	3,526	:	:	:	2.4
52.1	:	:	:	:	:
52.2	:	:	:	:	:
52.3	:	:	:	:	:
52.4	:	:	:	:	:
52.5	:	:	:	:	:
52.6	:	:	:	:	:
52.7	:	:	:	:	:

Table 5.77

Productivity/competitiveness characteristics, 1997

NACE Rev. 1	Turnover per enterprise (thousand ECU)	Turnover per person employed (thousand ECU)	Value added per person employed (thousand ECU)	Gross operating surplus per person employed (thousand ECU)	Wage adjusted labour productivity (%)
Total	414.4	:	:	:	:
Motor	634.6	:	:	:	:
50.1	:	:	:	:	:
50.2	:	:	:	:	:
50.3	:	:	:	:	:
50.4	:	:	:	:	:
50.5	:	:	:	:	:
Wholesale	427.6	67.3	5.4	2.2	198.5
51.1	:	43.8	:	:	:
51.2	:	59.8	:	:	:
51.3	:	117.5	:	:	:
51.4	:	80.8	:	:	:
51.5	:	120.2	:	:	:
51.6	:	59.3	:	:	:
51.7	:	44.4	:	:	:
Retail	317.1	:	:	:	:
52.1	:	:	:	:	:
52.2	:	:	:	:	:
52.3	:	:	:	:	:
52.4	:	:	:	:	:
52.5	:	:	:	:	:
52.6	:	:	:	:	:
52.7	:	:	:	:	:

Source: National Statistical Office

Table 5.78

Five leading groups in the retail food industry, 1997

	Total sales (million ECU)	Market share (%)	Food sales (million ECU)	Market share (%)
Metro (H)	747	16.6	672	17.9
Tengelmann (H)	470	10.4	235	6.3
Csemege-Meinl (Meinl H)	390	8.6	370	9.8
Rewe (H)	160	3.5	144	3.8
Cora (H)	153	3.4	130	3.5
Market leaders 1-5	1,919	42.5	1,551	41.3

Source: M+M Eurodata

Table 5.79

Main indicators as a share of turnover, 1997 (1) (%)

NACE Rev. 1	Turnover (million ECU)	Production value	Value added at factor cost	Personnel costs	Gross operating surplus	Gross investment in tangible goods
Total	27,053	22.2	:	4.3	:	:
Motor	4,579	17.0	:	3.0	:	:
50.1	:	:	:	:	:	:
50.2	:	:	:	:	:	:
50.3	:	:	:	:	:	:
50.4	:	:	:	:	:	:
50.5	:	:	:	:	:	:
Wholesale	16,487	23.1	:	4.3	:	:
51.1	:	:	:	:	:	:
51.2	:	:	:	:	:	:
51.3	:	:	:	:	:	:
51.4	:	:	:	:	:	:
51.5	:	:	:	:	:	:
51.6	:	:	:	:	:	:
51.7	:	:	:	:	:	:
Retail	5,988	23.8	:	5.5	:	:
52.1	:	:	:	:	:	:
52.2	:	:	:	:	:	:
52.3	:	:	:	:	:	:
52.4	:	:	:	:	:	:
52.5	:	:	:	:	:	:
52.6	:	:	:	:	:	:
52.7	:	:	:	:	:	:

(1) Revised; for businesses with double-entry book-keeping only.

Source: National Statistical Office

NACE Rev. 1

50: sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel

50.1: sale of motor vehicles; 50.2: maintenance and repair of motor vehicles; 50.3: sale of motor vehicles parts and accessories; 50.4: sale, maintenance and repair of motorcycles and related parts and accessories; 50.5: retail sale of automotive fuel;

51: wholesale trade and commission trade, except of motor vehicles and motorcycles

51.1: wholesale on a fee or contract basis; 51.2: wholesale of agricultural raw materials and live animals; 51.3: wholesale of food, beverages and tobacco; 51.4: wholesale of household goods; 51.5: wholesale of non-agricultural intermediate products, waste and scrap; 51.6: wholesale of machinery, equipment and supplies; 51.7: other wholesale;

52: retail trade, except of motor vehicles and motorcycles; repair of personal and household goods

52.1: retail sale in non-specialised stores; 52.2: retail sale of food, beverages and tobacco in specialised stores; 52.3: retail sale of pharmaceuticals and medical goods, cosmetic and toilet articles; 52.4: other retail sale of new goods in specialised stores; 52.5: retail sale of second-hand goods in stores; 52.6: retail sale not in stores; 52.7: repair of personal and household goods.

Table 5.80

Enterprise and employment characteristics, 1997 (1)

NACE Rev. 1	Number of enterprises (units)	Number of persons employed (units)	Number of persons employed/enterprise (units)	Share of employees in the number of persons employed (%)	Personnel costs per employee (thousand ECU)
Total	39,624	:	:	:	3.8
Motor	4,775	:	:	:	3.8
50.1	:	:	:	:	:
50.2	:	:	:	:	:
50.3	:	:	:	:	:
50.4	:	:	:	:	:
50.5	:	:	:	:	:
Wholesale	22,560	:	:	:	5.1
51.1	:	:	:	:	:
51.2	:	:	:	:	:
51.3	:	:	:	:	:
51.4	:	:	:	:	:
51.5	:	:	:	:	:
51.6	:	:	:	:	:
51.7	:	:	:	:	:
Retail	12,289	:	:	:	2.5
52.1	:	:	:	:	:
52.2	:	:	:	:	:
52.3	:	:	:	:	:
52.4	:	:	:	:	:
52.5	:	:	:	:	:
52.6	:	:	:	:	:
52.7	:	:	:	:	:

(1) Revised; for businesses with double-entry book-keeping only.

Table 5.81

Productivity/competitiveness characteristics, 1997 (1)

NACE Rev. 1	Turnover per enterprise (thousand ECU)	Turnover per person employed (thousand ECU)	Value added per person employed (thousand ECU)	Gross operating surplus per person employed (thousand ECU)	Wage adjusted labour productivity (%)
Total	682.7	:	:	:	:
Motor	958.9	:	:	:	:
50.1	:	:	:	:	:
50.2	:	:	:	:	:
50.3	:	:	:	:	:
50.4	:	:	:	:	:
50.5	:	:	:	:	:
Wholesale	730.8	:	:	:	:
51.1	:	:	:	:	:
51.2	:	:	:	:	:
51.3	:	:	:	:	:
51.4	:	:	:	:	:
51.5	:	:	:	:	:
51.6	:	:	:	:	:
51.7	:	:	:	:	:
Retail	487.2	:	:	:	:
52.1	:	:	:	:	:
52.2	:	:	:	:	:
52.3	:	:	:	:	:
52.4	:	:	:	:	:
52.5	:	:	:	:	:
52.6	:	:	:	:	:
52.7	:	:	:	:	:

(1) Revised; for businesses with double-entry book-keeping only.

Source: National Statistical Office

Table 5.82

Main indicators as a share of turnover, 1997 (%)

NACE Rev. 1	Turnover (million ECU)	Production value	Value added at factor cost	Personnel costs	Gross operating surplus	Gross investment in tangible goods
Total	4,302	21.1	:	4.5	:	2.3
Motor	463	23.7	:	5.0	:	8.0
50.1	:	:	:	:	:	:
50.2	:	:	:	:	:	:
50.3	:	:	:	:	:	:
50.4	:	:	:	:	:	:
50.5	245	18.3	:	4.7	:	:
Wholesale	2,594	19.7	:	2.7	:	1.7
51.1	26	39.6	:	3.9	:	:
51.2	9	32.0	:	5.7	:	:
51.3	733	14.6	:	2.3	:	:
51.4	394	22.4	:	4.7	:	:
51.5	1,071	19.6	:	2.2	:	:
51.6	127	20.3	:	4.0	:	:
51.7	234	28.2	:	2.5	:	:
Retail	1,245	23.1	:	8.0	:	1.6
52.1	590	22.2	:	8.0	:	:
52.2	42	16.3	:	5.3	:	:
52.3	78	22.6	:	12.8	:	:
52.4	383	26.1	:	7.9	:	:
52.5	13	23.1	:	8.0	:	:
52.6	136	18.8	:	5.6	:	:
52.7	3	:	:	28.1	:	:

Source: National Statistical Office

NACE Rev. 1

50: sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel
50.1: sale of motor vehicles; 50.2: maintenance and repair of motor vehicles; 50.3: sale of motor vehicles parts and accessories; 50.4: sale, maintenance and repair of motorcycles and related parts and accessories; 50.5: retail sale of automotive fuel;

51: wholesale trade and commission trade, except of motor vehicles and motorcycles
51.1: wholesale on a fee or contract basis; 51.2: wholesale of agricultural raw materials and live animals; 51.3: wholesale of food, beverages and tobacco; 51.4: wholesale of household goods; 51.5: wholesale of non-agricultural intermediate products, waste and scrap; 51.6: wholesale of machinery, equipment and supplies; 51.7: other wholesale;

52: retail trade, except of motor vehicles and motorcycles; repair of personal and household goods
52.1: retail sale in non-specialised stores; 52.2: retail sale of food, beverages and tobacco in specialised stores; 52.3: retail sale of pharmaceuticals and medical goods, cosmetic and toilet articles; 52.4: other retail sale of new goods in specialised stores; 52.5: retail sale of second-hand goods in stores; 52.6: retail sale not in stores; 52.7: repair of personal and household goods.

Table 5.83

Enterprise and employment characteristics, 1997

NACE Rev. 1	Number of enterprises (units)	Number of persons employed (units)	Number of persons employed/enterprise (units)	Share of employees in the number of persons employed (%)	Personnel costs per employee (thousand ECU)
Total	15,434	105,400	6.83	94.6	1.9
Motor	1,236	10,761	8.71	97.1	2.2
50.1	:	:	:	:	:
50.2	:	:	:	:	:
50.3	:	:	:	:	:
50.4	:	:	:	:	:
50.5	208	3,929	18.89	98.4	3.0
Wholesale	3,730	28,164	7.55	97.0	2.6
51.1	448	497	1.11	93.4	2.2
51.2	52	293	5.63	95.9	1.8
51.3	974	8,245	8.47	96.5	2.1
51.4	866	7,585	8.76	96.6	2.6
51.5	802	7,337	9.15	98.2	3.2
51.6	231	1,941	8.40	99.2	2.7
51.7	357	2,265	6.34	95.5	2.7
Retail	10,468	66,475	6.35	93.2	1.6
52.1	3,042	34,120	11.22	95.7	1.4
52.2	172	1,125	6.54	94.6	2.1
52.3	547	4,095	7.49	98.2	2.5
52.4	1,724	15,059	8.73	96.7	2.1
52.5	551	1,405	2.55	72.2	1.0
52.6	4,148	9,677	2.33	79.5	1.0
52.7	284	994	3.50	92.3	1.0

Table 5.84

Productivity/competitiveness characteristics, 1997

NACE Rev. 1	Turnover per enterprise (thousand ECU)	Turnover per person employed (thousand ECU)	Value added per person employed (thousand ECU)	Gross operating surplus per person employed (thousand ECU)	Wage adjusted labour productivity (%)
Total	278.7	40.8	:	:	:
Motor	374.8	43.1	:	:	:
50.1	:	:	:	:	:
50.2	:	:	:	:	:
50.3	:	:	:	:	:
50.4	:	:	:	:	:
50.5	1,179.6	62.4	:	:	:
Wholesale	695.4	92.1	:	:	:
51.1	57.5	51.8	:	:	:
51.2	172.7	30.6	:	:	:
51.3	753.0	89.0	:	:	:
51.4	455.0	51.9	:	:	:
51.5	1,335.0	145.9	:	:	:
51.6	549.9	65.4	:	:	:
51.7	655.6	103.3	:	:	:
Retail	118.9	18.7	:	:	:
52.1	193.9	17.3	:	:	:
52.2	244.1	37.3	:	:	:
52.3	142.5	19.0	:	:	:
52.4	221.9	25.4	:	:	:
52.5	23.8	9.3	:	:	:
52.6	32.9	14.1	:	:	:
52.7	11.2	3.2	:	:	:

Source: National Statistical Office

Table 5.85

Main indicators as a share of turnover, 1997 (%)

NACE Rev. 1	Turnover (million ECU)	Production value	Value added at factor cost	Personnel costs	Gross operating surplus	Gross investment in tangible goods
Total	5,894	33.2	:	:	:	:
Motor	318	68.1	:	:	:	:
50.1	:	:	:	:	:	:
50.2	:	:	:	:	:	:
50.3	:	:	:	:	:	:
50.4	:	:	:	:	:	:
50.5	:	:	:	:	:	:
Wholesale	2,819	27.3	:	:	:	:
51.1	:	:	:	:	:	:
51.2	:	:	:	:	:	:
51.3	:	:	:	:	:	:
51.4	:	:	:	:	:	:
51.5	:	:	:	:	:	:
51.6	:	:	:	:	:	:
51.7	:	:	:	:	:	:
Retail	2,757	35.2	:	:	:	:
52.1	:	:	:	:	:	:
52.2	:	:	:	:	:	:
52.3	:	:	:	:	:	:
52.4	:	:	:	:	:	:
52.5	:	:	:	:	:	:
52.6	:	:	:	:	:	:
52.7	:	:	:	:	:	:

Source: National Statistical Office

NACE Rev. 1
50: sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel
50.1: sale of motor vehicles; 50.2: maintenance and repair of motor vehicles; 50.3: sale of motor vehicles parts and accessories; 50.4: sale, maintenance and repair of motorcycles and related parts and accessories; 50.5: retail sale of automotive fuel;

51: wholesale trade and commission trade, except of motor vehicles and motorcycles
51.1: wholesale on a fee or contract basis; 51.2: wholesale of agricultural raw materials and live animals; 51.3: wholesale of food, beverages and tobacco; 51.4: wholesale of household goods; 51.5: wholesale of non-agricultural intermediate products, waste and scrap; 51.6: wholesale of machinery, equipment and supplies; 51.7: other wholesale;

52: retail trade, except of motor vehicles and motorcycles; repair of personal and household goods
52.1: retail sale in non-specialised stores; 52.2: retail sale of food, beverages and tobacco in specialised stores; 52.3: retail sale of pharmaceuticals and medical goods, cosmetic and toilet articles; 52.4: other retail sale of new goods in specialised stores; 52.5: retail sale of second-hand goods in stores; 52.6: retail sale not in stores; 52.7: repair of personal and household goods.

Table 5.86

Enterprise and employment characteristics, 1997

NACE Rev. 1	Number of enterprises (units)	Number of persons employed (units)	Number of persons employed/enterprise (units)	Share of employees in the number of persons employed (%)	Personnel costs per employee (thousand ECU)
Total	17,499	246,500	14.09	65.6	:
Motor	1,211	18,400	15.19	65.8	:
50.1	:	:	:	:	:
50.2	:	:	:	:	:
50.3	:	:	:	:	:
50.4	:	:	:	:	:
50.5	:	:	:	:	:
Wholesale	2,475	38,200	15.43	65.7	:
51.1	:	:	:	:	:
51.2	:	:	:	:	:
51.3	:	:	:	:	:
51.4	:	:	:	:	:
51.5	:	:	:	:	:
51.6	:	:	:	:	:
51.7	:	:	:	:	:
Retail	13,813	189,900	13.75	65.6	:
52.1	:	:	:	:	:
52.2	:	:	:	:	:
52.3	:	:	:	:	:
52.4	:	:	:	:	:
52.5	:	:	:	:	:
52.6	:	:	:	:	:
52.7	:	:	:	:	:

Table 5.87

Productivity/competitiveness characteristics, 1997

NACE Rev. 1	Turnover per enterprise (thousand ECU)	Turnover per person employed (thousand ECU)	Value added per person employed (thousand ECU)	Gross operating surplus per person employed (thousand ECU)	Wage adjusted labour productivity (%)
Total	336.8	23.9	:	:	:
Motor	262.4	17.3	:	:	:
50.1	:	:	:	:	:
50.2	:	:	:	:	:
50.3	:	:	:	:	:
50.4	:	:	:	:	:
50.5	:	:	:	:	:
Wholesale	1,139.0	73.8	:	:	:
51.1	:	:	:	:	:
51.2	:	:	:	:	:
51.3	:	:	:	:	:
51.4	:	:	:	:	:
51.5	:	:	:	:	:
51.6	:	:	:	:	:
51.7	:	:	:	:	:
Retail	199.6	14.5	:	:	:
52.1	:	:	:	:	:
52.2	:	:	:	:	:
52.3	:	:	:	:	:
52.4	:	:	:	:	:
52.5	:	:	:	:	:
52.6	:	:	:	:	:
52.7	:	:	:	:	:

Source: National Statistical Office

Table 5.88

Five leading groups in the retail food industry, 1997

	Total sales (million ECU)	Market share (%)	Food sales (million ECU)	Market share (%)
Metro (PL)	1,528	7.3	917	4.9
JMB Polska (JMR PL)	306	1.5	270	1.4
HIT (Dohle PL)	223	1.1	192	1.0
Rewe (PL)	177	0.8	159	0.8
ABCO	129	0.6	127	0.7
Market leaders 1-5	2,363	11.3	1,665	8.8

Source: M+M Eurodata

Table 5.89

Main indicators as a share of turnover, 1997 (%)

NACE Rev. 1	Turnover (million ECU)	Production value	Value added at factor cost	Personnel costs	Gross operating surplus	Gross investment in tangible goods
Total	136,248	23.8	11.8	4.0	:	1.6
Motor	10,872	25.4	12.4	4.0	:	2.8
50.1	3,618	20.0	9.6	4.1	:	3.3
50.2	3,026	29.9	14.2	5.3	:	0.9
50.3	1,646	26.1	14.1	3.9	:	2.2
50.4	161	27.5	10.9	0.6	:	0.1
50.5	2,421	27.4	13.2	2.6	:	3.1
Wholesale	84,644	21.3	10.1	3.5	:	1.4
51.1	5,912	28.5	13.2	4.4	:	1.3
51.2	3,645	28.9	9.4	2.8	:	0.4
51.3	15,615	18.0	8.8	3.3	:	0.6
51.4	11,571	23.7	10.8	4.5	:	0.9
51.5	15,229	19.4	8.3	4.4	:	1.6
51.6	5,851	31.9	15.3	3.9	:	0.7
51.7	26,822	18.4	9.9	2.6	:	1.7
Retail	40,733	28.6	15.0	5.0	:	1.6
52.1	20,649	25.1	14.0	4.4	:	0.8
52.2	5,551	24.4	13.0	4.6	:	0.8
52.3	2,292	26.5	12.1	3.6	:	0.6
52.4	8,258	39.8	19.8	7.6	:	1.8
52.5	1,107	31.6	14.9	2.3	:	0.0
52.6	2,383	26.4	12.3	8.4	:	1.0
52.7	492	49.5	25.2	6.6	:	0.5

Source: National Statistical Office

NACE Rev. 1

50: sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel

50.1: sale of motor vehicles; 50.2: maintenance and repair of motor vehicles; 50.3: sale of motor vehicles parts and accessories; 50.4: sale, maintenance and repair of motorcycles and related parts and accessories; 50.5: retail sale of automotive fuel;

51: wholesale trade and commission trade, except of motor vehicles and motorcycles

51.1: wholesale on a fee or contract basis; 51.2: wholesale of agricultural raw materials and live animals; 51.3: wholesale of food, beverages and tobacco; 51.4: wholesale of household goods; 51.5: wholesale of non-agricultural intermediate products, waste and scrap; 51.6: wholesale of machinery, equipment and supplies; 51.7: other wholesale;

52: retail trade, except of motor vehicles and motorcycles; repair of personal and household goods

52.1: retail sale in non-specialised stores; 52.2: retail sale of food, beverages and tobacco in specialised stores; 52.3: retail sale of pharmaceuticals and medical goods, cosmetic and toilet articles; 52.4: other retail sale of new goods in specialised stores; 52.5: retail sale of second-hand goods in stores; 52.6: retail sale not in stores; 52.7: repair of personal and household goods.

Table 5.90

Enterprise and employment characteristics, 1997

NACE Rev. 1	Number of enterprises (units)	Number of persons employed (units)	Number of persons employed/enterprise (units)	Share of employees in the number of persons employed (%)	Personnel costs per employee (thousand ECU)
Total	1,006,696	2,061,000	2.05	66.1	4.0
Motor	104,172	204,000	1.96	65.2	3.3
50.1	:	:	:	:	:
50.2	:	:	:	:	:
50.3	:	:	:	:	:
50.4	:	:	:	:	:
50.5	:	:	:	:	:
Wholesale	244,181	719,000	2.94	81.2	5.1
51.1	:	:	:	:	:
51.2	:	:	:	:	:
51.3	:	:	:	:	:
51.4	:	:	:	:	:
51.5	:	:	:	:	:
51.6	:	:	:	:	:
51.7	:	:	:	:	:
Retail	658,343	1,138,000	1.73	56.8	3.1
52.1	:	:	:	:	:
52.2	:	:	:	:	:
52.3	:	:	:	:	:
52.4	:	:	:	:	:
52.5	:	:	:	:	:
52.6	:	:	:	:	:
52.7	:	:	:	:	:

Table 5.91

Productivity/competitiveness characteristics, 1997

NACE Rev. 1	Turnover per enterprise (thousand ECU)	Turnover per person employed (thousand ECU)	Value added per person employed (thousand ECU)	Gross operating surplus per person employed (thousand ECU)	Wage adjusted labour productivity (%)
Total	135.3	66.1	7.8	:	194.1
Motor	104.4	53.3	6.6	:	201.1
50.1	:	:	:	:	:
50.2	:	:	:	:	:
50.3	:	:	:	:	:
50.4	:	:	:	:	:
50.5	:	:	:	:	:
Wholesale	346.6	117.7	11.9	:	232.4
51.1	:	:	:	:	:
51.2	:	:	:	:	:
51.3	:	:	:	:	:
51.4	:	:	:	:	:
51.5	:	:	:	:	:
51.6	:	:	:	:	:
51.7	:	:	:	:	:
Retail	61.9	35.8	5.4	:	170.9
52.1	:	:	:	:	:
52.2	:	:	:	:	:
52.3	:	:	:	:	:
52.4	:	:	:	:	:
52.5	:	:	:	:	:
52.6	:	:	:	:	:
52.7	:	:	:	:	:

Source: National Statistical Office

Table 5.92

Main indicators as a share of turnover, 1997 (%)

NACE Rev. 1	Turnover (million ECU)	Production value	Value added at factor cost	Personnel costs	Gross operating surplus	Gross investment in tangible goods
Total (1)	21,238	:	:	:	:	:
Motor	2,034	:	:	:	:	:
50.1	672	:	:	:	:	:
50.2	147	:	:	:	:	:
50.3	:	:	:	:	:	:
50.4	3	:	:	:	:	:
50.5	624	:	:	:	:	:
Wholesale	10,618	:	:	:	:	:
51.1	1,205	:	:	:	:	:
51.2	556	:	:	:	:	:
51.3	2,586	:	:	:	:	:
51.4	1,556	:	:	:	:	:
51.5	2,335	:	:	:	:	:
51.6	346	:	:	:	:	:
51.7	2,034	:	:	:	:	:
Retail (1)	8,375	:	:	:	:	:
52.1	:	:	:	:	:	:
52.2	:	:	:	:	:	:
52.3	:	:	:	:	:	:
52.4	:	:	:	:	:	:
52.5	:	:	:	:	:	:
52.6	:	:	:	:	:	:
52.7	:	:	:	:	:	:

(1) 1996.

Source: National Statistical Office

NACE Rev. 1
50: sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel
50.1: sale of motor vehicles; 50.2: maintenance and repair of motor vehicles; 50.3: sale of motor vehicles parts and accessories; 50.4: sale, maintenance and repair of motorcycles and related parts and accessories; 50.5: retail sale of automotive fuel;

51: wholesale trade and commission trade, except of motor vehicles and motorcycles
51.1: wholesale on a fee or contract basis; 51.2: wholesale of agricultural raw materials and live animals; 51.3: wholesale of food, beverages and tobacco; 51.4: wholesale of household goods; 51.5: wholesale of non-agricultural intermediate products, waste and scrap; 51.6: wholesale of machinery, equipment and supplies; 51.7: other wholesale;

52: retail trade, except of motor vehicles and motorcycles; repair of personal and household goods
52.1: retail sale in non-specialised stores; 52.2: retail sale of food, beverages and tobacco in specialised stores; 52.3: retail sale of pharmaceuticals and medical goods, cosmetic and toilet articles; 52.4: other retail sale of new goods in specialised stores; 52.5: retail sale of second-hand goods in stores; 52.6: retail sale not in stores; 52.7: repair of personal and household goods.

Table 5.93

Enterprise and employment characteristics, 1997

NACE Rev. 1	Number of enterprises (units)	Number of persons employed (units)	Number of persons employed/enterprise (units)	Share of employees in the number of persons employed (%)	Personnel costs per employee (thousand ECU)
Total (1)	226,113	:	:	:	:
Motor	12,017	:	:	:	:
50.1	3,902	:	:	:	:
50.2	4,305	:	:	:	:
50.3	3,113	:	:	:	:
50.4	56	:	:	:	:
50.5	641	:	:	:	:
Wholesale	51,572	:	:	:	:
51.1	14,883	:	:	:	:
51.2	1,948	:	:	:	:
51.3	11,705	:	:	:	:
51.4	6,034	:	:	:	:
51.5	2,944	:	:	:	:
51.6	666	:	:	:	:
51.7	13,392	:	:	:	:
Retail (1)	162,524	:	:	:	:
52.1	79,424	:	:	:	:
52.2	16,886	:	:	:	:
52.3	3,572	:	:	:	:
52.4	47,000	:	:	:	:
52.5	3,737	:	:	:	:
52.6	9,387	:	:	:	:
52.7	2,518	:	:	:	:

(1) 1996.

Table 5.94

Productivity/competitiveness characteristics, 1997

NACE Rev. 1	Turnover per enterprise (thousand ECU)	Turnover per person employed (thousand ECU)	Value added per person employed (thousand ECU)	Gross operating surplus per person employed (thousand ECU)	Wage adjusted labour productivity (%)
Total (1)	94.0	:	:	:	:
Motor	169.3	:	:	:	:
50.1	172.3	:	:	:	:
50.2	34.0	:	:	:	:
50.3	:	:	:	:	:
50.4	50.4	:	:	:	:
50.5	973.9	:	:	:	:
Wholesale	205.9	:	:	:	:
51.1	81.0	:	:	:	:
51.2	285.6	:	:	:	:
51.3	221.0	:	:	:	:
51.4	257.8	:	:	:	:
51.5	793.2	:	:	:	:
51.6	518.9	:	:	:	:
51.7	151.9	:	:	:	:
Retail (1)	52.3	:	:	:	:
52.1	:	:	:	:	:
52.2	:	:	:	:	:
52.3	:	:	:	:	:
52.4	:	:	:	:	:
52.5	:	:	:	:	:
52.6	:	:	:	:	:
52.7	:	:	:	:	:

(1) 1996.

Source: National Statistical Office

Table 5.95

Five leading groups in the retail food industry, 1997

	Total sales (million ECU)	Market share (%)	Food sales (million ECU)	Market share (%)
Tesco (SK)	100	3.4	28	1.3
Interkontakt Group (SK)	84	2.9	67	2.9
Prima Zdroj	75	2.6	69	2.9
Essex	37	1.3	33	1.4
Zdroj Univers	33	1.1	28	1.2
Market leaders 1-5	329	11.4	255	11.1

Source: M+M Eurodata

Table 5.96

Main indicators as a share of turnover, 1997 (1) (%)

NACE Rev. 1	Turnover (million ECU)	Production value	Value added at factor cost	Personnel costs	Gross operating surplus	Gross investment in tangible goods
Total	25,019	:	:	:	:	:
Motor	1,541	:	:	:	:	:
50.1	780	:	:	:	:	:
50.2	288	:	:	:	:	:
50.3	207	:	:	:	:	:
50.4	6	:	:	:	:	:
50.5	260	:	:	:	:	:
Wholesale	18,354	:	:	:	:	:
51.1	7,599	:	:	:	:	:
51.2	367	:	:	:	:	:
51.3	1,303	:	:	:	:	:
51.4	1,449	:	:	:	:	:
51.5	3,666	:	:	:	:	:
51.6	699	:	:	:	:	:
51.7	3,271	:	:	:	:	:
Retail	5,124	:	:	:	:	:
52.1	2,700	:	:	:	:	:
52.2	484	:	:	:	:	:
52.3	264	:	:	:	:	:
52.4	1,327	:	:	:	:	:
52.5	7	:	:	:	:	:
52.6	281	:	:	:	:	:
52.7	60	:	:	:	:	:

(1) Includes VAT.

Source: National Statistical Office

NACE Rev. 1
50: sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel
50.1: sale of motor vehicles; 50.2: maintenance and repair of motor vehicles; 50.3: sale of motor vehicles parts and accessories; 50.4: sale, maintenance and repair of motorcycles and related parts and accessories; 50.5: retail sale of automotive fuel;

51: wholesale trade and commission trade, except of motor vehicles and motorcycles
51.1: wholesale on a fee or contract basis; 51.2: wholesale of agricultural raw materials and live animals; 51.3: wholesale of food, beverages and tobacco; 51.4: wholesale of household goods; 51.5: wholesale of non-agricultural intermediate products, waste and scrap; 51.6: wholesale of machinery, equipment and supplies; 51.7: other wholesale;

52: retail trade, except of motor vehicles and motorcycles; repair of personal and household goods
52.1: retail sale in non-specialised stores; 52.2: retail sale of food, beverages and tobacco in specialised stores; 52.3: retail sale of pharmaceuticals and medical goods, cosmetic and toilet articles; 52.4: other retail sale of new goods in specialised stores; 52.5: retail sale of second-hand goods in stores; 52.6: retail sale not in stores; 52.7: repair of personal and household goods.

Table 5.97

Enterprise and employment characteristics, 1997

NACE Rev. 1	Number of enterprises (units)	Number of persons employed (units)	Number of persons employed/enterprise (units)	Share of employees in the number of persons employed (%)	Personnel costs per employee (thousand ECU)
Total	81,424	:	:	:	:
Motor	4,602	:	:	:	:
50.1	1,362	:	:	:	:
50.2	2,644	:	:	:	:
50.3	428	:	:	:	:
50.4	43	:	:	:	:
50.5	125	:	:	:	:
Wholesale	34,987	:	:	:	:
51.1	21,992	:	:	:	:
51.2	479	:	:	:	:
51.3	1,000	:	:	:	:
51.4	1,876	:	:	:	:
51.5	1,021	:	:	:	:
51.6	774	:	:	:	:
51.7	7,845	:	:	:	:
Retail	41,835	:	:	:	:
52.1	23,876	:	:	:	:
52.2	3,988	:	:	:	:
52.3	954	:	:	:	:
52.4	5,968	:	:	:	:
52.5	228	:	:	:	:
52.6	5,675	:	:	:	:
52.7	1,146	:	:	:	:

Table 5.98

Productivity/competitiveness characteristics, 1997 (1)

NACE Rev. 1	Turnover per enterprise (thousand ECU)	Turnover per person employed (thousand ECU)	Value added per person employed (thousand ECU)	Gross operating surplus per person employed (thousand ECU)	Wage adjusted labour productivity (%)
Total	307.3	:	:	:	:
Motor	334.9	:	:	:	:
50.1	572.4	:	:	:	:
50.2	108.9	:	:	:	:
50.3	484.7	:	:	:	:
50.4	147.0	:	:	:	:
50.5	2,078.8	:	:	:	:
Wholesale	524.6	:	:	:	:
51.1	345.5	:	:	:	:
51.2	765.3	:	:	:	:
51.3	1,302.8	:	:	:	:
51.4	772.3	:	:	:	:
51.5	3,591.1	:	:	:	:
51.6	903.1	:	:	:	:
51.7	417.0	:	:	:	:
Retail	122.5	:	:	:	:
52.1	113.1	:	:	:	:
52.2	121.5	:	:	:	:
52.3	277.0	:	:	:	:
52.4	222.3	:	:	:	:
52.5	32.2	:	:	:	:
52.6	49.5	:	:	:	:
52.7	52.4	:	:	:	:

(1) Turnover, includes VAT.

Source: National Statistical Office

Table 5.99

Main indicators as a share of turnover, 1996 (%)

NACE Rev. 1	Turnover (million ECU) (1)	Production value	Value added at factor cost	Personnel costs	Gross operating surplus	Gross investment in tangible goods
Total	13,564	31.3	:	9.7	:	:
Motor	2,651	26.1	:	7.3	:	:
50.1	1,307	21.5	:	4.7	:	:
50.2	513	14.7	:	4.6	:	:
50.3	223	11.9	:	3.4	:	:
50.4	19	15.8	:	6.1	:	:
50.5	590	29.6	:	13.1	:	:
Wholesale	5,867	34.8	:	9.2	:	:
51.1	:	:	:	:	:	:
51.2	142	3.0	:	0.9	:	:
51.3	1,962	4.5	:	1.9	:	:
51.4	956	26.2	:	8.8	:	:
51.5	1,637	20.3	:	6.4	:	:
51.6	249	48.2	:	10.6	:	:
51.7	921	49.8	:	13.5	:	:
Retail	5,047	29.9	:	11.9	:	:
52.1	2,289	38.3	:	17.4	:	:
52.2	508	12.2	:	3.1	:	:
52.3	294	2.0	:	0.8	:	:
52.4	1,886	25.0	:	8.6	:	:
52.5	:	:	:	:	:	:
52.6	70	11.1	:	2.4	:	:
52.7	:	:	:	:	:	:

(1) 1997.

Source: National Statistical Office

NACE Rev. 1
50: sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel
50.1: sale of motor vehicles; 50.2: maintenance and repair of motor vehicles; 50.3: sale of motor vehicles parts and accessories; 50.4: sale, maintenance and repair of motorcycles and related parts and accessories; 50.5: retail sale of automotive fuel;

51: wholesale trade and commission trade, except of motor vehicles and motorcycles
51.1: wholesale on a fee or contract basis; 51.2: wholesale of agricultural raw materials and live animals; 51.3: wholesale of food, beverages and tobacco; 51.4: wholesale of household goods; 51.5: wholesale of non-agricultural intermediate products, waste and scrap; 51.6: wholesale of machinery, equipment and supplies; 51.7: other wholesale;

52: retail trade, except of motor vehicles and motorcycles; repair of personal and household goods
52.1: retail sale in non-specialised stores; 52.2: retail sale of food, beverages and tobacco in specialised stores; 52.3: retail sale of pharmaceuticals and medical goods, cosmetic and toilet articles; 52.4: other retail sale of new goods in specialised stores; 52.5: retail sale of second-hand goods in stores; 52.6: retail sale not in stores; 52.7: repair of personal and household goods.

Table 5.100

Enterprise and employment characteristics, 1996

NACE Rev. 1	Number of enterprises (units)	Number of persons employed (units)	Number of persons employed/enterprise (units)	Share of employees in the number of persons employed (%)	Personnel costs per employee (thousand ECU)
Total (1)	23,043	108,000	4.69	85.1	10.4
Motor (1)	1,582	19,000	12.01	72.6	11.2
50.1	701	:	:	:	15.6
50.2 (1)	626	:	:	:	3.2
50.3	208	:	:	:	9.2
50.4	10	:	:	:	3.5
50.5	37	:	:	:	26.4
Wholesale (1)	15,531	23,000	1.48	:	14.3
51.1	9,287	:	:	:	13.7
51.2	63	:	:	:	2.1
51.3	429	:	:	:	8.4
51.4	779	:	:	:	21.1
51.5	869	:	:	:	17.6
51.6	182	:	:	:	17.8
51.7	3,922	:	:	:	14.8
Retail (1)	5,930	66,000	11.13	74.0	7.9
52.1	2,737	:	:	:	10.3
52.2	285	:	:	:	3.3
52.3	99	:	:	:	0.9
52.4	2,351	:	:	:	5.9
52.5	12	:	:	:	8.3
52.6	135	:	:	:	5.5
52.7	311	:	:	:	7.1

(1) 1997, except for personnel costs per employee.

Table 5.101

Productivity/competitiveness characteristics, 1997

NACE Rev. 1	Turnover per enterprise (thousand ECU)	Turnover per person employed (thousand ECU)	Value added per person employed (thousand ECU)	Gross operating surplus per person employed (thousand ECU)	Wage adjusted labour productivity (%)
Total	588.7	125.6	:	:	:
Motor	1,675.8	139.5	:	:	:
50.1	1,863.8	:	:	:	:
50.2	819.4	:	:	:	:
50.3	1,070.5	:	:	:	:
50.4	1,871.0	:	:	:	:
50.5	15,952.2	:	:	:	:
Wholesale	377.7	255.1	:	:	:
51.1	:	:	:	:	:
51.2	2,252.9	:	:	:	:
51.3	4,574.0	:	:	:	:
51.4	1,227.1	:	:	:	:
51.5	1,883.5	:	:	:	:
51.6	1,367.4	:	:	:	:
51.7	234.8	:	:	:	:
Retail	851.0	76.5	:	:	:
52.1	836.3	:	:	:	:
52.2	1,782.2	:	:	:	:
52.3	2,971.7	:	:	:	:
52.4	802.0	:	:	:	:
52.5	0.8	:	:	:	:
52.6	518.7	:	:	:	:
52.7	:	:	:	:	:

Source: National Statistical Office

Notes and sources

This section of "Distributive trades in Europe" contains some background reference information that may help your understanding of the economic analysis and data.

First of all some general statistical sources are provided that relate to the main databases that have been used in the compilation of this publication: the Structural Business Statistics (SBS) database, National Accounts SEC2 database, the Labour Force Survey, the Labour Costs Survey, the Structure of Earnings Survey and the Small and Medium-sized Enterprises (SME) database.

Industries and services are categorised according to the statistical classification of economic activities in the European Community, NACE Rev. 1. A detailed list of the classification and a definition of each economic activity is provided.

Sources

"Distributive trades in Europe" aims to offer a comprehensive view of commerce within the European Economic Area and CECs. Data has been gathered from a number of sources in order to analyse distributive trades from a variety of angles.

The main basis for the analysis contained within this product may be found within the data collected through the SBS Regulation. This data contains structural statistics on European enterprises. However, in an attempt to provide a wider-ranging analysis several other sources have also been used in this product. They include the National Accounts SEC2 database, the Labour Force Survey, the Labour Cost Survey, the Structure of Earnings Survey and the SME database on small and medium-sized Enterprises.

Although these statistics have the same source, the Statistical Office of the European Communities (Eurostat), the same definitions are not always employed for the concepts within the methodology of each data collection. Hence, the data can show significant differences for concepts that may appear similar or even identical at first sight. The list of sources presented detail the data used in this publication and should help the reader to find methodological explanations regarding specific data collections.

SBS database

The SBS database contains structural business statistics on industrial and service enterprises in Europe. Data on distributive trades is collected within the legal framework provided by the SBS Regulation No. 58/97, Annex 3.

A few important points should be kept in mind when reading the analysis in this publication and when studying the data presented in the tables or found in the SBS database. Many trade activities are characterised by a dynamic business population with many enterprises moving into and out of the population every year. The large number of small enterprises, particularly relevant for the distributive trades' activity, means that care has to be taken when comparing the absolute number of enterprises between countries, as small methodological difference may lead to large differences in statistics.

Employment figures in the SBS database are nearly always based on head counts and hence do not take account of differences in working time or the incidence of part-time employment; these two factors vary greatly between activities and between countries. It should be noted that the data for Sweden do not include persons classified as sole proprietors. Sole proprietorships are enterprises who in the institutional sector classification belong to the household sector. Indeed, they are households that act like producers, that are not incorporated.

The turnover concept does not always give a good indication of the economic weight or importance of an activity. In wholesale trade, large amounts of turnover can pass through enterprises with few persons employed, and the same commodities can be invoiced several times. In motor trade, there is a mixture of wholesale and retail trade activity. This means that a breakdown of Section G turnover by NACE Rev. 1 Division can lead to some strange results in terms of the weight of each Division. The indicator gross margin/production value is an important measure in giving an (approximation) of service provided within distributive trades.

Measures of productivity are generally presented using value added at factor costs per person employed. Income and expenditure classified as financial or extraordinary in company accounts is excluded. This has some implications when comparing indicators based on value added across activities and between countries. Another drawback is that the employment data are not calculated as full-time equivalents, with consequences for ratios such as value added per person employed when comparing across activities and between countries. The analysis sometimes refers to wage adjusted labour productivity (value added divided by personnel costs, expressed in percentage terms). For this indicator an element of distortion has to be considered: namely that value added is linked to all production factors with the labour force measured as the total number of persons employed, whilst for personnel costs the data relates to the paid staff only (employees). Hence, activities that display a propensity for a high number of working proprietors or unpaid personnel (such as family workers) may have artificially high ratios. In order to try to take account of this distortion the personnel costs have been adjusted by multiplying by the number of persons employed over the number of employees.

The SBS domain of Eurostat's reference database, New Cronos, contains structural business statistics on all business activities in Europe. For more information on SBS data collection see "Services structural statistics, national methodologies", released in 1999.

Number of enterprises: a count of the enterprises registered to the population concerned in the business register. Dormant units are excluded.

Turnover: totals invoiced including all duties and taxes (with the exception of VAT and other similar deductible taxes) and all other charges passed to the customer. Price reductions, rebates and discounts are deducted.

Production value: the amount produced based on sales after deduction of the purchases of merchandise and of changes in stocks.

Value added at factor cost: gross income from operating activities including operating subsidies and excluding indirect taxes = turnover + capitalised production + other operating income +/- changes in stocks - purchases of goods and services - taxes on products and production.

Gross operating surplus: surplus generated by operating activities after compensation of the labour factor = value added minus personnel costs.

Total purchases of goods and services: value of all goods and services purchased for resale or consumption excluding capital goods.

Personnel costs: total remuneration, in cash or in kind, payable by an employer to an employee in return for work done by the latter including employer's social security contributions. Wages and salaries include only employees' social security contributions retained by the unit.

Gross investment in tangible goods: investment in all tangible goods (new and existing) bought or produced for own use, having a useful life of more than one year. Excludes capital goods used under rental/lease contracts.

Number of persons employed: includes employees and unpaid persons employed. Unpaid persons covers the self-employed and unpaid family workers who live with the proprietor of a unit and work regularly for the unit, but do not have a contract of service nor receive a fixed wage or salary.

Number of employees: persons who work for an employer and have an employment contract and receive compensation (wages, salaries, fees, gratuities, remuneration in kind). Includes part-time and seasonal workers.

Wage adjusted labour productivity: (value added/personnel costs) * (employees/persons employed).

National Accounts

Data published by Eurostat for the European Union countries are in accordance with the ESA-79 (European System of Integrated Economic Accounts), which is the European Union version of the United Nations' system of national accounts (SNA). It gives common definitions for the complete set of national accounts, input-output tables and financial (flow or funds) accounts. The basic classification NACE-CLIO, which is used to build the input-output tables is used to detail the aggregates by branch. For the final consumption of households on the economic territory, the breakdown is made by consumption purpose. For each branch, the gross value added is the difference between the value of actual output and the value of intermediate consumption.

As far as employment is concerned, the occupied population covers all the persons engaged in some activity which is considered as productive (in the national accounts sense) whether these persons are civilian or military personnel. It comprises both the residents and the non-residents (wage and salary earners, self-employed persons, unpaid family workers, armed forces) who work for resident producer units.

The final consumption of households represents the value of goods and services used for the direct satisfaction of individual human wants. The flow contains the final consumption of resident households and non-residents households on the economic territory. Final consumption is broken down on the basis of the two-digit classification of ESA corresponding to the "Classification of household goods and services" of the SNA (System of national accounts, United Nations).

Labour Force Survey

The first Community Labour Force Survey was organised in the six original Member States in 1960 by the Statistical Office of the European Communities. In 1992 a number of changes were introduced with the aim of improving the quality of the data and their reliability at national and regional level. Council Regulation (EEC) 3711/91 of 16th December 1991 specified the contents and reliability criteria for the new survey, to be conducted annually from 1992 until further notice. The concepts and definitions used remain essentially those adopted by the thirteenth International Conference of Labour Statisticians of 1982 and used in the Community surveys from 1983 to 1991, so that a high degree of comparability is assured between the results from the two series. The methodological basis and the contents of this new series of surveys are described in the publication "Labour Force Survey - Methods and Definitions - 1996".

The main statistical objective of the Labour Force Survey is to divide the population of working age (15 years and above) into three mutually exclusive and exhaustive groups (persons in employment, unemployed persons and inactive persons) and to provide descriptive and explanatory data on each of these categories. Respondents are assigned to one of these groups on the basis of the most objective information possible, obtained through a survey questionnaire, which relates principally to their actual activity within a defined reference week.

The National Statistical Institutes are responsible for selecting the sample, preparing the questionnaires, conducting the interviews among households, and forwarding the results to Eurostat in accordance with a common coding scheme. Eurostat devises the programme for analysing the results and is responsible for processing and disseminating the information forwarded by the National Statistical Institutes. Perfect comparability across 15 countries is difficult to achieve, even were it to be by means of a single direct survey, in other words, a survey carried out at the same time, using the same questionnaire and a single method of recording. Nevertheless, the degree of comparability of the Community Labour Force Survey results is considerably higher than that of any other existing set of statistics on employment or unemployment available for the Member States. This is due to: the recording of the same set of characteristics in each country; a close correspondence between the Community list of questions and the national questionnaires; the use of the same definitions for all countries; the use of common classifications (for example, NACE Rev. 1 as the economic activity); the synchronisation of the survey in spring; the data being centrally processed by Eurostat.

The Community Labour Force Survey, although subject to the constraints of the Community's statistical requirements, is a joint effort by Member States to co-ordinate their national employment surveys, which must serve their own national requirements. Therefore, in spite of the close co-ordination between the National Statistical Institutes and Eurostat, there inevitably remain some differences in the survey from country to country.

Labour Cost Survey

The Labour Cost Survey is conducted every four years, the last occasion being 1996. The survey is a follow-up to similar surveys carried out in 1978, 1981, 1984, 1988 and 1992 on industry, distributive trades, banking, insurance and other services. For the intervening years, Eurostat has devised a method to update figures in co-operation with the statistical services of the Member States which allows each country to make estimations according to the availability of basic data.

The statistical offices of the Member States are responsible for their sampling methods, for drawing up appropriate questionnaires, for collecting data from enterprises or local units and for processing replies. After verification, and in accordance with the utilisation programme defined by the Commission, they forward the results of the survey to the Statistical Office of the European Communities. At Community level, the Statistical Office of the European Communities is responsible for the processing, analysis and dissemination of the results transmitted. The survey covers enterprises or local units with at least ten employees carrying out the main activities defined and described by the economic activities of Sections C, D, E, F, G, H and K, Divisions 65 and 66 and Group 63.3 of NACE Rev. 1. The data collected on labour costs covers: wage costs, including bonuses and allowances, and all incidental expenditure, including in particular employers' contributions to social security and supplementary schemes and other social payments, including the cost of vocational training and any taxes or subsidies directly related to labour costs; the total number of staff employed by the enterprises or local units; working hours.

Structure of Earnings Survey

The legal basis for the collection of this data is Council Regulation No. 2744/95 of 27 November 1995 on "statistics on the structure and distribution of earnings", according to which the Member States and the Commission would produce statistics on the structure and distribution of all employees' earnings in Sections C to K of the NACE Rev. 1 classification. Data concern local units of 10 and more employees classified by size and principal activity.

The data are based on a survey carried out through the statistical services of the Member States, unless information would already be available from other sources that would be equivalent as regards accuracy, quality and timeliness. For each employee, the following information is collected:

- gross earnings for a complete pay period for the representative month, including the various bonuses regularly paid, additional payments for overtime, shift work, night work, weekend work and commissions; likewise included are remuneration for periods of absence (leave or sickness) entirely paid by the employer and family allowances and other benefits laid down by collective agreements or voluntarily within the local unit; total earnings related to overtime and special payments for shift work, night work or weekend work must be specified separately;
- annual gross earnings in the relevant financial year, i.e. the gross earnings as defined above referred to an annual basis, plus occasional bonuses (such as holiday bonuses, 13th month and profit sharing); the amount of occasional bonuses must be specified separately;
- the number of hours paid or the number of hours in a standard working week or month for which payment is made, the number of paid overtime hours in the pay period and the number of holidays, excluding public holidays per year;
- the sex, age and occupation classified according to the International Standard Classification of Occupations, level of education and training, length of service in the enterprise, working arrangements, i.e. full-time or part-time and type of employment contract.

Small and medium-sized (SME) enterprises database

The SME tabular data are structural enterprise data, broken down by employment size class and economic activity at national and regional levels. For most of the countries data have been produced by public institutions. These are primarily: the national statistical institutes, in many cases they integrate different official data sources such as enterprise censuses, the VAT register, the statistical business register, results of surveys, etc.; the social security authority, which is the major source of employment data.

In some cases data come from private institutions. In general, the SME tabular data are created from several sources, either at the national level, or within Eurostat. This is necessary when: one source cannot provide all the variables requested (for example, the social security authority generally cannot provide data on turnover or value added); one source does not cover all economic activities (in several countries surveys are carried out for certain activities as VAT registers do not contain exempted activities); one source cannot provide information on all enterprise sizes (for example, industrial censuses generally do not cover smaller firms or social security registers do not include enterprises without employees). Please note that no data exists for size class "0" in Greece.

The main characteristic of the SME data is its breakdown by employment size class. The size class boundaries are expressed in terms of paid employment: this allows us to separate the sole proprietorships (size class "0") from the rest of the enterprise population, as they employ by definition only unpaid staff, consisting of the entrepreneur or family members. As well as the number of enterprises by size class, the SME data contain several economic variables. The number of persons employed is defined as the total number of persons who work in the enquiry unit (inclusive of working proprietors, partners working regularly in the enterprise and unpaid family workers), as well as persons who work outside the unit but belong to it and are paid by it (for example, commercial representatives, delivery men, repair and maintenance groups). Included are persons absent for a short period (for example, on sick leave, paid leave or special leave), and also those on strike, but not those absent for an indefinite period. Also included are part-time workers who are regarded as such under the laws of the country concerned and who are on the payroll, as well as seasonal workers, apprentices and homeworkers on the payroll. Excluded are labour forces made available to the unit by other enterprises and charged for, persons carrying out repair and maintenance work in the enquiry unit on behalf of other enterprises, as well as those doing compulsory military service.

Number of employees (paid employment) is defined as persons who work for an employer and who have a contract of employment and receive compensation in the form of wages, salaries, fees, gratuities, payments by result or payments in kind. Homeworkers, regardless of whether they are on the payroll or not, are excluded.

Turnover is the total invoiced by the unit during the reference period, that is all market sales of goods or services supplied to third parties. Turnover includes all duties and taxes on the goods or services invoiced by the unit with the exception of value added tax (VAT) invoiced by the unit vis-à-vis its customers. Turnover includes all other charges (transport, packaging, etc.) ascribed to the customer even if these charges are listed separately in the invoice. Reduction in prices, rebates and discounts, as well as the value of returned packaging must be deducted, but not cash discounts. Turnover does not include sales of fixed assets. Operating subsidies received from public authorities or the EU are also excluded.

NACE Rev. 1 classification of economic activities

NACE Rev. 1 was adopted in order to establish a common statistical classification of economic activities within the European Community and to ensure comparability between national and Community classifications and hence national and Community statistics. In 1970 the General Industrial Classification of Economic Activities within the European Communities was compiled and known as NACE, later as NACE '70 or NACE 1970. NACE Rev. 1 replaced NACE '70 and in doing so established a direct link between the European classification and the internationally recognised ISIC Rev. 3 developed under the auspices of the United Nations. These two classifications are directly compatible at the 2-digit level and more detailed levels of ISIC Rev. 3 can be calculated by aggregating the more detailed levels of NACE Rev. 1.

The NACE Rev. 1 classification is composed of the following levels:

- 17 Sections - letters A to Q;
- 31 Subsections - 2-character alphabetical codes;
- 60 Divisions - 2-digit codes;
- 222 Groups - 3-digit codes;
- 503 Classes - 4-digit codes.

Distributive trades are classified within Section G of NACE Rev. 1. There are three Divisions identified for motor trade (NACE Rev. 1 50), wholesale trade (NACE Rev. 1 51) and retail trade (NACE Rev. 1 52).

MOTOR TRADE

NACE Rev. 1 50: sale, maintenance and repair of motor vehicles and motorcycles; retail sale of automotive fuel

50.1: sale of motor vehicles;

50.2: maintenance and repair of motor vehicles;

50.3: sale of motor vehicles parts and accessories;

50.4: sale, maintenance and repair of motorcycles and related parts and accessories;

50.5: retail sale of automotive fuel.

WHOLESALE TRADE

NACE Rev. 1 51: wholesale trade and commission trade, except of motor vehicles and motorcycles

51.1: wholesale on a fee or contract basis;

- 51.11 agents involved in the sale of agricultural raw materials, live animals, textile raw materials and semi-finished goods;
- 51.12 agents involved in the sale of fuels, ores, metals and industrial chemicals;
- 51.13 agents involved in the sale of timber and building materials;
- 51.14 agents involved in the sale of machinery, industrial equipment, ships and aircraft;
- 51.15 agents involved in the sale of furniture, household goods, hardware and ironmongery;
- 51.16 agents involved in the sale of textiles, clothing, footwear and leather goods;
- 51.17 agents involved in the sale of food, beverages and tobacco;
- 51.18 agents specialising in the sale of particular products or ranges of products n.e.c.;
- 51.19 agents involved in the sale of a variety of goods;

51.2: wholesale of agricultural raw materials and live animals;

- 51.21 wholesale of grain, seeds and animal feeds;
- 51.22 wholesale of flowers and plants;
- 51.23 wholesale of live animals;
- 51.24 wholesale of hides, skins and leather;
- 51.25 wholesale of unmanufactured tobacco;

51.3: wholesale of food, beverages and tobacco;

- 51.31 wholesale of fruit and vegetables;
- 51.32 wholesale of meat and meat products;
- 51.33 wholesale of dairy produce, eggs and edible oils and fats;
- 51.34 wholesale of alcoholic and other beverages;
- 51.35 wholesale of tobacco products;
- 51.36 wholesale of sugar and chocolate and sugar confectionery;
- 51.37 wholesale of coffee, tea, cocoa and spices;
- 51.38 wholesale of other food including fish, crustaceans and molluscs;
- 51.39 non-specialised wholesale of food, beverages and tobacco;

51.4: wholesale of household goods;

- 51.41 wholesale of textiles;
- 51.42 wholesale of clothing and footwear;
- 51.43 wholesale of electrical household appliances and radio and television goods;
- 51.44 wholesale of china and glassware, wallpaper and cleaning materials;
- 51.45 wholesale of perfume and cosmetics;
- 51.46 wholesale of pharmaceutical goods;
- 51.47 wholesale of other household goods;

51.5: wholesale of non-agricultural intermediate products, waste and scrap;

- 51.51 wholesale of solid, liquid and gaseous fuels and related products;
- 51.52 wholesale of metals and metal ores;
- 51.53 wholesale of wood, construction materials and sanitary equipment;
- 51.54 wholesale of hardware, plumbing and heating equipment and supplies;
- 51.55 wholesale of chemical products;
- 51.56 wholesale of other intermediate products;
- 51.57 wholesale of waste and scrap;

51.6: wholesale of machinery, equipment and supplies;

- 51.61 wholesale of machine tools;
- 51.62 wholesale of construction machinery;
- 51.63 wholesale of machinery for the textile industry, and of sewing and knitting machines;
- 51.64 wholesale of office machinery and equipment;
- 51.65 wholesale of other machinery for use in industry, trade and navigation;
- 51.66 wholesale of agricultural machinery and accessories and implements, including tractors;

51.7: other wholesale.

RETAIL TRADE

NACE Rev. 1 52: retail trade, except of motor vehicles and motorcycles; repair of personal and household goods

52.1: retail sale in non-specialised stores;

- 52.11 retail sale in non-specialized stores with food, beverages or tobacco predominating;
- 52.12 other retail sale in non-specialised stores;

52.2: retail sale of food, beverages and tobacco in specialised stores;

- 52.21 retail sale of fruit and vegetables;
- 52.22 retail sale of meat and meat products;
- 52.23 retail sale of fish, crustaceans and molluscs;
- 52.24 retail sale of bread, cakes, flour confectionery and sugar confectionery;
- 52.25 retail sale of alcoholic and other beverages;
- 52.26 retail sale of tobacco products;
- 52.27 other retail sale of food, beverages and tobacco in specialized stores;

52.3: retail sale of pharmaceuticals and medical goods, cosmetic and toilet articles;

- 52.31 dispensing chemists;
- 52.32 retail sale of medical and orthopaedic goods;
- 52.33 retail sale of cosmetic and toilet articles;

52.4: other retail sale of new goods in specialised stores;

- 52.41 retail sale of textiles;
- 52.42 retail sale of clothing;
- 52.43 retail sale of footwear and leather goods;
- 52.44 retail sale of furniture, lighting equipment and household articles n.e.c.;
- 52.45 retail sale of electrical household appliances and radio and television goods;
- 52.46 retail sale of hardware, paints and glass;
- 52.47 retail sale of books, newspapers and stationery;
- 52.48 other retail sale in specialized stores;

52.5: retail sale of second-hand goods in stores;

52.6: retail sale not in stores;

- 52.61 retail sale via mail order houses;
- 52.62 retail sale via stalls and markets;
- 52.63 other non-store retail sale;

52.7: repair of personal and household goods.

- 52.71 repair of boots, shoes and other articles of leather;
- 52.72 repair of electrical household goods;
- 52.73 repair of watches, clocks and jewellery;
- 52.74 repair n.e.c.

Signs and abbreviations

EU-15	total of Member States of the EU
EUR-11	euro-zone
B	Belgium
DK	Denmark
D	Germany
EL	Greece
E	Spain
F	France
IRL	Ireland
I	Italy
L	Luxembourg
NL	the Netherlands
A	Austria
P	Portugal
FIN	Finland
S	Sweden
UK	the United Kingdom
IS	Iceland
NO	Norway
EEA	European Economic Area
ECU	European currency unit
billion	thousand million
LCS	Labour Cost Survey
LFS	Labour Force Survey
SBS	Structural Business Statistics
SES	Structure of Earnings Survey
SME	Small and Medium-sized Enterprises
:	data not available

Venta • Salg • Verkauf • Πωλήσεις • Sales • Vente • Vendita • Verkoop • Venda • Myynti • Försäljning

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