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European business

Facts and figures

Part 5: Trade and tourism

Data 1991-2001

4

EUROPEAN COMMISSION

THEME 4
Industry, trade and services

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European business, Facts & figures
This publication has been produced by unit D2 of Eurostat, responsible for structural business statistics. The opinions expressed are those of the individual authors alone and do not necessarily reflect the position of the European Commission.

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Guide to the publication

CONTENTS OF THE PUBLICATION

European business aims to provide a standard set of information for industrial and service activities within the EU. The data provided in European business traces the major developments of output (in terms of value added), employment and external trade. The commentaries concentrate largely on the 3-digit level of the NACE Rev. 1 classification of economic activities [1].

Structure of the publication

European business is divided into three main sections:

1. The first provides a general overview of the structure of the EU's business economy, looking at changes in output, employment and external trade.

2. The second provides a sectoral breakdown of industrial activities into 15 separate chapters, each of which contains a number of subchapters usually based on the 3-digit level of the NACE classification. Each chapter concludes with a statistical annex presenting structural business statistics and external trade statistics.

3. The third section provides a sectoral breakdown of service activities into 9 separate chapters (again with subchapters and a statistical annex, usually based on structural business statistics or alternatively a functional database specific to the subject area).

The chapters in European business are structured on the basis of their NACE code, starting with energy and the extractive industries and finishing with business services, the information society and media. Each chapter begins with a preliminary section explaining the sectoral coverage of the data provided.

NACE is a hierarchical classification made up of Sections (1-letter codes), Subsections (2-letter codes), Divisions (2-digit codes), Groups (3-digit codes) and Classes (4-digit codes). NACE establishes 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 the lower levels of ISIC Rev.3 can be calculated by aggregating the more detailed levels of NACE.

The compilation of industrial data has followed a different historical development to that of other sectors of the business economy. It is generally easier to compile activity and product statistics about goods/merchandise than it is to collect information, for example, relating to knowledge or information-based services. Hence, the balance of this publication reflects to some degree the information that is currently available from official statistical sources. For this reason too, a different form of presentation is employed for the majority of the manufacturing chapters, using long time-series for enterprises with 20 or more persons employed.

There has been a rapid improvement in data availability for service sectors during the last few years and most EU Member States now compile annual statistics. Clearly it will take a number of years to build up robust time-series and considerable work still needs to be done in the area of product statistics for services.

The weak availability of energy, mining and quarrying, construction and services' data often renders it difficult to provide a standard set of information and where this is the case, Eurostat's functional databases have been used to complement structural business statistics. Furthermore, for these chapters it is important to note that structural business statistics that are presented for those sectors take account of all enterprises (in other words, with one or more persons employed), as opposed to the threshold of 20 or more persons employed for manufacturing chapters.

[1] Published by Eurostat, ISBN 92-826-8767-8, available from the usual outlets for Commission publications.

Differences compared to the 2002 edition

This edition of European business focuses increasingly on official sources of information, as the European statistical system continues to make advances. Nowhere is this development more felt in the 2003 edition than for service sectors, as a result of a rapid improvement in the availability of data - allowing EU totals to be calculated for the first time.

As a result, the chapter on distributive trades has been split into the three activities of motor, wholesale and retail trade, each with their own chapter. Furthermore, the media services have been separated from the information society chapter.

Within industrial activities there have also been some changes, such as the separation of water supply and sewerage industries from the energy chapter and the inclusion of a subchapter on recycling and waste treatment - once more reflecting an improvement in data availability in areas that were traditionally less well covered by business statistics.

Furthermore, several chapters have had their activity definitions modified in an attempt to improve data coverage, at both the chapter and subchapter level. Hence, readers should take care if comparing data across different editions of the publication.

Another development in this edition is the inclusion of candidate country data. For the moment this is found in the overview chapter (together with a short commentary), as well as in the statistical annex to each industrial and service chapter. It is hoped that as the accession of the various candidate countries moves forward their statistics will become fully integrated in the publication.

GUIDE TO THE STATISTICS

Two main data sources should be distinguished when using this publication: those originating from official sources (collected normally by the national statistical institutes in each Member State and harmonised by Eurostat) and those provided by professional trade associations (representative organisations of manufacturers and service providers) and other non-official bodies. Non-official sources are easily recognised as they always appear in a shaded box.

Time frame

The data within this publication was extracted from various Eurostat databases during the first two weeks of November 2002. Fresher data may well be available on the CD-ROM or by consulting the Eurostat Datashop network and asking for a tailor-made extraction from the NewCronos database. The accompanying text was written during the fourth quarter of 2002 and the first quarter of 2003.

Where possible the time-series for industrial activities are presented for the EU between 1991 and 2001. Individual country data are generally available up until 1999 or 2000 depending upon the country and activity in question. EU totals have been estimated for 2000 and/or 2001 where sufficient data exists. Services data are usually presented in the form of a snapshot for the latest year available.

Exchange rates

All data are reported in ECU/EUR terms, with national currencies converted using average exchange rates prevailing for the year in question. As of 1 January 1999, eleven of the Member States entered into an economic and monetary union (EMU). These countries formed what has become known as the euro-zone. Technically data available prior to that date should continue to be denominated in ECU terms, whilst data available afterwards should be denominated in euro. However, as the conversion rate was ECU 1 = EUR 1, for practical purposes the terms may be used interchangeably and this publication denotes all such monetary series in euro. On 1 January 2001, Greece also became a member of the euro-zone.

Whilst the conversion to a common currency of data originally expressed in national currencies facilitates comparison, large fluctuations in currency markets are partially responsible for movements identified when looking at the evolution of a series in euro terms (especially at the level of an individual country). For the exchange rates used, please refer to table SA.1 in the statistical annex of the overview chapter.

Geographical coverage

EU totals cover all 15 Member States. Footnotes are added when a partial total is created from an incomplete set of country information.

Figures for Germany are on a post-unification basis, unless otherwise stated.

Non-availability

The colon (:) is used to represent data that is not available, either because it has not been provided to Eurostat or because it is confidential. In figures (charts), missing information is footnoted as not available.

OFFICIAL DATA SOURCES

SBS

The bulk of the information contained within European business is derived from the structural business statistics (SBS) database. This data has been collected within the legal framework provided by the SBS Regulation (2). Structural business statistics for the candidate countries are collected on a comparable basis, although data are currently provided to Eurostat on the basis of specific agreements rather than with a legal basis.

There are three main collections of SBS data that have been used in this publication. The first covers long time-series (3) for enterprises with 20 or more persons employed (often available from 1985 onwards). These series are only used in this publication for manufacturing activities. Not all Member States have transmitted data relating to the enterprise as the statistical unit and the specified size threshold. The table below presents the main discrepancies with respect to these standards.

Table 1

Country	Year	Statistical unit and coverage
Belgium	1985-1994 1995-2000	Enterprises with 20 employees or more Enterprises with 1 person employed or more
Greece	1985-2000	Local kind-of-activity units with 20 persons employed or more
Spain	1985-1998 1999-2000	Enterprises with 1 employee or more Enterprises with 1 person employed or more
France	1985-1995	Enterprises with 20 employees or more; NACE Section D excludes Divisions 16 and 37; Subsection DA excludes Division 16; Subsection DN excludes Division 37
Ireland	1985-2000 1995	Enterprises with 3 persons employed or more for NACE Sections C to E NACE Subsection DN also includes Subsection DF
Luxembourg	1985-1994 1995-1998 1985-1995	Kind-of-activity units with 20 persons employed or more Kind-of-activity units with 1 person employed or more NACE Group 15.9 also includes Group 16.0
Netherlands	1997	Number of enterprises: data for this variable are rounded to multiples of 5; a "0" therefore means 2 or less enterprises
Austria	1985-1994	Establishments with 20 persons employed or more for NACE Sections C and D
Portugal	1985-2000 1990-1995	Enterprises with 1 person employed or more NACE Section D and Subsection DA exclude Division 37
Finland	1986-1994 1995-2000	Establishments with 5 persons employed or more Enterprises with 1 person employed or more
United Kingdom	1997	NACE Group 10.3 also includes Group 10.2; NACE Group 13.2 also includes Group 13.1

(2) Council Regulation (EC, EURATOM) No. 58/97 of 20 December 1996 concerning structural business statistics.

(3) Public access to data for the Member States is available via the Eurostat Datashop network: NewCronos, theme 4, domain SBS, collection Enterpr, table ent_l_ms.

The second collection covers all enterprises [(4)] and these series have been used for non-manufacturing activities. The data generally start in 1995, although a small number of Member States have provided longer time-series. Not all Member States/candidate countries have transmitted data relating to this population. In particular, some Member States/candidate countries can only provide data for units with employment above a certain size threshold. The table below presents the main deviations from the standard population as laid down in the SBS Regulation (all enterprises, regardless of their level of employment).

[(4)] Public access to data for the Member States is available via the Eurostat Datashop network: NewCronos, theme 4, domain SBS, collection Enterpr, table enter_ms and by consulting theme 4, domain SBS, collection Enterpr, table enter_cc for the candidate countries.

Table 2a

	Statistical unit and coverage used from 1995 onwards			
	Industry	**Construction**	**Trade**	**Services**
Country	**(NACE Sections C - E)**	**(NACE Section F)**	**(NACE Section G)**	**(NACE Sections H - K)**
Denmark	No major deviations	NACE Class 45.21 also includes data for NACE Classes 45.23 and 45.24; NACE Class 45.31 also includes data for NACE Class 45.34	No major deviations	
Germany	No major deviations			1998 onwards: data are not comparable with previous years 1999: for Section I to K the number of enterprises and turnover come from a different source than the other variables and the two groups of variables can not be compared 1999: for production value and value added NACE Class 60.21 also includes Class 60.23, Class 74.13 also includes Class 74.14, Class 74.11 also includes Classes 74.12 and 74.15
Greece	No major deviations		Enterprises with a turnover of 15 million GRD or more	
Spain	1995 to 1998: enterprises with 1 employee or more	No major deviations	1995-1998: enterprises with 1 employee or more	
France	1995: NACE Section D excludes Divisions 16 and 37; Subsection DA excludes Division 16; Subsection DN excludes Division 37	No major deviations		In some transport activities within NACE Group 61.2 the coverage is only enterprises with 6 employees or more
Ireland	Enterprises with 3 persons employed or more 1995: NACE Subsection DN also includes Subsection DF	No major deviations		
Italy	Turnover from the principal activity at the NACE 4-digit level: this data is supplied only for enterprises with 200 employees or more	No major deviations		
Luxembourg	1996 onwards: kind-of-activity units with 1 person employed or more		No major deviations	1995-1998: NACE Class 66.01 also includes Class 66.02
Netherlands	Number of enterprises: data for this variable are rounded to multiples of 5; a “0” therefore means 2 or less enterprises			
	Enterprises with 20 employees or more for NACE Section E; total intramural R&D expenditure and total number of R&D personnel refer to enterprises with 10 employees or more	No major deviations		Survey on holdings (NACE Class 74.15): enterprises with 5 employees or more

Table 2b

Country	Statistical unit and coverage used from 1995 onwards			
	Industry (NACE Sections C - E)	Construction (NACE Section F)	Trade (NACE Section G)	Services (NACE Sections H - K)
Portugal	1995: NACE Subsection DN and Section D exclude Division 37	No major deviations		
United Kingdom	1996: NACE Class 14.12 also includes Class 14.13; Class 15.94 also includes Class 15.95; Class 17.15 also includes Class 17.14; Class 17.16 also includes Class 17.17; Class 21.11 also includes 21.12 1997: NACE Group 10.3 also includes Group 10.2; Group 13.2 also includes Group 13.1; Class 14.12 also includes Class 14.13; Class 17.15 also includes Class 17.14: Class 17.16 also includes 17.17; Class 21.12 also includes Class 21.11 1998: NACE Group 10.3 also includes Group 10.2; Class 14.12 also includes Class 14.13	No major deviations	1998: NACE Class 51.35 also includes Classes 51.36 and 51.37	No major deviations
Czech Republic	Sampling errors at 3-digit level are significant (due to low coverage). The 3-digit level is only an estimation based on the sample, but the sample differs between years. The sample is only representative for data at the 2-digit level of NACE Rev. 1			
Estonia	In 1995, Section D data at the 2-digit level cover enterprises with 20 and more employees, except investment data which cover enterprises with 50 and more employees. Data at the Section level cover all enterprises	No major deviations		1995: NACE Division 71 also includes Division 72
Hungary	Enterprises with 5 or more persons employed			
Latvia	No major deviations		It is recommended not to use 4-digit level data as the sampling plan for the survey was designed at the 3-digit level only	No major deviations
Slovak Republic	Covers enterprises with 20 or more persons employed as well as enterprises with less than 20 persons employed which were considered statistically important			

The third collection covers information broken down by employment size class. Again, not all Member States/candidate countries have transmitted data to Eurostat that relates to this statistical unit or population. In particular, some Member States/candidate countries can only provide data for units with employment above a certain size threshold. The table below summarises the main deviations from the standard statistical unit and coverage.

Data in this publication are generally available at the 3-digit NACE level, whilst more detailed information is often available within the SBS Enter tables at the 4-digit NACE level.

Table 3

Country	Statistical units and coverage			
	Industry **(NACE Sections C - E)**	**Construction** **(NACE Section F)**	**Trade** **(NACE Section G)**	**Services** **(NACE Sections H - K and M - 0)**
Germany	1995 onwards: enterprises with 20 persons employed or more		No major deviations	
Spain	1995 onwards: enterprises with 1 employee or more	No major deviations		
France	1995: enterprises with 20 employees or more		No major deviations	
Ireland	1995 onwards: enterprises with 3 persons employed or more	1995 onwards: enterprises with 20 persons employed or more	No major deviations	1997: NACE Group 60.1 also includes data for Classes 60.21, 60.22 and 60.23; NACE Group 74.6 also includes data for NACE Group 74.7
Netherlands	1999 onwards: employment size classes are defined in terms of employees; size class 1-9 has been approximated with size class 0-9 employees; size class 500-999 includes size class 1000+		1999 onwards: employment size classes are defined in terms of employees; size class 1 has been approximated with size class 0 employee; size class 2-4 has been approximated with size class 1-4 employees; size class 500-999 includes size class 1000+	1999 onwards: employment size classes are defined in terms of employees; size class 1-4 has been approximated with size class 0-4 employees; size class 1-9 has been approximated with size class 0-9 employees; size class 500-999 includes size class 1000+
Portugal	1996 onwards: employment size classes are defined in terms of employees; size class 1-9 has been approximated with size class 0-9 employees		1996 onwards: employment size classes are defined in terms of employees	
Sweden	1996: employment size classes are defined in terms of employees; size class 1-9 has been approximated with size class 0-9 employees	No major deviations		
United Kingdom	1995: enterprises with 20 persons employed or more 1997: NACE Group 10.3 also includes data for NACE Group 10.2; NACE Group 13.2 also includes data for NACE Group 13.1	1995: enterprises with 20 persons employed or more	No major deviations	
Estonia	1995: Section D data at the 2-digit level cover enterprises with 20 and more employees, except investment data which cover enterprises with 50 and more employees. Data at the Section level cover all enterprises 1995 to 1999: employment size classes are defined in terms of employees 1995 to 1998: data for size class 500-999 includes data for size class 1000+ as well 1996 to 1999: the size class total is not equal to the sum of the size classes published as the total also includes data for the size class 0 employees	1995 to 1999: employment size classes are defined in terms of employees 1995 to 1998: data for size class 500-999 includes data for size class 1000+ as well 1996 to 1999: data for size class 1-9 employees also includes data for size class 0 employees	1995 to 1999: employment size classes are defined in terms of employees 1995 to 1998: data for size class 500-999 includes data for size class 1000+ as well 1996 to 1999: size classes 0 and 1-9 employees are provided instead of size classes 1, 2-4 and 5-9 employees; data for size class 0 are published under the size class 1 and data for size class 1-9 are published under the size class 5-9	1995 to 1999: employment size classes are defined in terms of employees 1995 to 1998: data for size class 500-999 includes data for size class 1000+ as well 1996 to 1999: size classes 0 and 1-9 employees are provided instead of size classes 1-4 and 5-9 employees; data for size class 0 are published under the size class 1-4 and data for size class 1-9 are published under the size class 5-9 1995: NACE Division 71 also includes Division 72
Hungary	1998: enterprises with 5 persons employed or more; data for size class 1-9 persons employed are not available; data for size class 5-9 persons employed have been provided Data for the total of the size classes refer to enterprises with 5 persons employed or more		1998: enterprises with 5 persons employed or more; data for the total of the size classes refer to enterprises with 5 persons employed and more	
Slovenia	1995 to 1998: employment size classes are defined in terms of employees			
Slovak Republic	1995 to 1998: size classes are defined in terms of employees; data for the total of the size classes refer to enterprises with 20 and more employees			

Standard definitions of variables have been laid down. As such the figures are largely comparable across activities and countries. There are nevertheless some known divergences from the standard definitions. Until the reference year 1994 inclusive, Member States transmitted their data to Eurostat according to either the legal basis preceding the SBS Regulation for industry or on a voluntary basis for services. As far as possible Eurostat and the Member States have worked to convert these data in line with the variable definitions as implemented following the adoption of the SBS Regulation. However, the results of the conversion may not be of the same quality as the data collected from the 1995 reference year onwards. For France, this conversion is applied until the reference year 1995 inclusive. For Greece, this conversion is applied until the reference year 1996 inclusive. The table below presents the main known discrepancies with respect to the standard variable definitions as regards data from Member States and candidate countries.

Table 4

SBS enter long time series: enterprises employing 20 or more persons			
Country	**Year**	**Variable**	**Discrepancy**
Belgium	1995-1998	Production value	The purchase of goods and services for resale are not removed, resulting in the values being overestimated
Denmark	1990-1998	Value added at factor cost Gross operating surplus	Value added at basic prices Value added at basic prices - personnel costs
Spain	1985-1999	Gross investment in tangible goods	Gross investment in land and gross investment in machinery and equipment
Ireland	1991-1994 (and possibly later years)	Value added at factor cost	Value added is calculated at market prices excluding VAT; for sectors where other indirect taxes play an important role, for example where there are taxes on petroleum products, Irish value added is disproportionately large; this non-standard definition of value added influences the Irish manufacturing total (through aggregation of NACE), EU totals (through aggregation across countries) and ratios, notably labour productivity measures
	1991-1994	Gross operating surplus	Value added at market price excluding VAT - personnel costs
Italy	1992-1995	Number of persons employed	Number of employees
Finland	1986-1995	Value added at factor cost Gross operating surplus	Value added at market price Value added at market price - personnel costs
SBS enter: enterprises employing 1 or more persons			
Country	**Year**	**Variable**	**Discrepancy**
Belgium	1995-1998	Production value	The purchase of goods and services for resale are not removed, resulting in the values being overestimated
Germany	1999	Sections I to K: value added at factor cost	Does not include subsidies
Spain	1995-1998	Gross investment in tangible goods	Gross investment in land and gross investment in machinery and equipment
Ireland	1998-2000	Sections H, I and K: personnel costs	Wages and salaries
Finland	1995	Value added at factor cost Gross operating surplus	Value added at market prices Value added at market prices - personnel costs
Sweden	1995-1996	Number of persons employed: the number of persons employed and the number of employees are very close as self-employed persons are not included and for enterprises with less than 10 employees the number of employees is collected in full time equivalent units	
United Kingdom	1996-1999 1997	Gross investment in existing buildings and structures Turnover from trading and intermediary activities	Includes gross investment in land Turnover from trading activities of purchase and resale
Norway	1996-1997	For Sections C and D the definitions of variables 15 13 0 and 15 14 0 (concerning investment) are non-standard, however their sum is conform with the standard definitions	
Bulgaria	1996-1998	Changes in stocks	Concerns only changes in stocks of goods, and therefore excludes changes in stocks of services
	1996-1999 1999	Investment in existing buildings and structure Turnover and production value	Includes also investment in construction and alteration of buildings Does not includes duties and taxes on services invoiced by the unit
Cyprus	1995-1998	Change in stocks of finished products and work in progress manufactured by the unit	Includes change in stocks of all goods and services
Czech Republic	1995-1998	Number of enterprises	Average number of enterprises calculated on the basis of the length of the activity of the unit during the year; this means that an enterprise active only a part of the year is not counted as 1 but as a percentage (3 months=0.25 enterprises)
	1995-1998	Personnel costs and social security costs	Non-standard definitions
Hungary	1998	Number of employees	Estimated as a fixed percentage (99.5%) of the number of persons employed
Slovenia	1995-1998	Value added and wages and salaries	Non-standard definitions
SBS enter size class data			
Country	**Year**	**Variable**	**Discrepancy**
Denmark	1995-1996	Sections C to G: number of employees	Employees in full-time equivalents
Sweden	1996	Sections C to E: the number of persons employed and the number of employees are very close as self-employed persons are not included and for enterprises with less than 10 employees the number of employees is collected in full time equivalent units Sections H to K: number of persons employed shows in fact the number of employees	
Czech Republic	1995-1998	Number of enterprises	Average number of enterprises calculated on the basis of the length of the activity of the unit during the year; this means that an enterprise active only a part of the year is not counted as 1 but as a percentage (3 months=0.25 enterprises)
		Sections C to F: wages and salaries	Non-standard definition
Hungary	1998	Sections C to F: number of employees	Estimated as a fixed percentage (99.5%) of the number of persons employed
Slovenia	1995-1998	Value added	Non-standard definition
Slovak Republic	1995-1998	Sections G to K: number of persons employed	Number of employees

Estimates

EU-15 data for 2000 and 2001 are estimated. Estimates are made using individual country information and short-term indicators such as indices of production, output prices and employment. The individual country estimates are not published and as a result the information by Member State is generally only available up until 1999 or 2000 depending upon the country in question. The majority of estimates have been made for manufacturing series that concern 20 or more persons employed. It is important to note that these time-series for manufacturing activities will under-report absolute values and that this can be particularly important in activities where smaller enterprises (with less than 20 persons employed) play an important role - for example, the manufacture of textiles or clothing.

Prodcom

The legal basis of the data is Council Regulation (EEC) No 3924/91 on the establishment of a Community survey of industrial production (Prodcom Regulation).

This Regulation requires that production be recorded according to the product headings of the Prodcom list. The list is based on the Community's external trade classification, the Combined Nomenclature (CN). The list does not, however, cover all products. The list is divided into Divisions corresponding to the (2-digit) Divisions of NACE Rev. 1. Each Prodcom code is identified by an eight-digit code. The first six digits are the CPA code (Community Classification of Products by Activity). The last two digits normally provide a reference to the Combined Nomenclature (CN), although there are exceptions to this rule.

The physical volume and the value of production are normally recorded for the products in the Prodcom list. Different production concepts are used in the survey, namely:

a) production sold during the survey period;

b) actual production (total production) during the survey period. This includes any production which is incorporated into the manufacture of other products. Such production is normally taken to mean own products which are either processed into another product or fitted into another product in the reporting unit itself, in another plant belonging to it, or under contract in another unit;

c) production during the survey period which is intended for sale.

The value of production sold/production intended for sale should be calculated on the basis of the ex-works selling price obtained/-obtainable during the reporting period. It also includes packaging costs, even if they are charged separately. However, the following are not included: any turnover tax and consumer tax charged; separately charged freight costs; any discounts granted to customers.

The particular physical units of the CN classification have normally been adopted for recording the volume of production. In exceptional cases a different and/or supplementary unit is recorded. All units belonging to the individual Prodcom headings are specifically indicated in the data set.

The Prodcom statistics normally cover all enterprises/local units which manufacture products contained in the Prodcom list. Among the rules on representativeness the Regulation stipulates that all enterprises in Sections C, D and E of NACE Rev. 1 employing at least 20 persons must be included. In addition, at least 90% of production in each (4-digit) Class of NACE Rev. 1 must also be recorded.

There is currently no Prodcom data available on NewCronos for candidate countries. Eurostat is migrating the Prodcom data set from NewCronos to Comext.

External trade

EU external trade statistics are available in the Comext database, and can be compiled according to a product classification (CPA). The analysis focuses on external trade data for the period between 1991 and 2001. No estimates are made for external trade statistics, although it is possible that subsequent revisions may occur. The data are processed by summing together product statistics (using a conversion table from CN to CPA). The data for EU-15 are reported in terms of trade flows with the rest of the world, in other words extra-EU trade. However, for the individual Member States total trade flows are used (in other words intra-EU and extra-EU trade). All trade figures are given in current EUR terms.

European Business Trends

Tracking the business cycle is indispensable for many economic actors. The European Business Trends (EBT) database provides politicians, government agencies, bankers, business owners, consumers and trade unionists with information that is crucial when making decisions on whether industries grow, stagnate or decline. The legal base of the European system of quantitative Short Term Statistics is the Council Regulation No. 1165/98, which was adopted on 19 May 1998 and is in the process of being implemented.

One variable from the EBT database is directly presented in this publication, namely the domestic output price index. Output price indices report the short-term changes in the prices of commodities produced and sold in a given Member State. Converted to an annual series, this index has also been used to deflate SBS turnover, production value and value added data, using appropriate activity indices to create series in constant price terms. Production and employment indices from the EBT database also provide valuable information that is used to nowcast SBS data for 2000 and 2001.

All price-determining characteristics of the products should be taken into account when compiling these indices, including the quantity of units sold, transport provided, rebates, service conditions, guarantee conditions and destination. The specification must be such that in subsequent reference periods, the observation unit is able to identify the product and to provide the appropriate price per unit. The appropriate price is the ex-factory price that includes all duties and taxes on the goods and services invoiced by the unit but excludes VAT invoiced by the unit vis-à-vis its customer and similar deductible taxes directly linked to turnover.

There is currently no EBT data available for candidate countries on NewCronos. However, the development of these short-term indices is in an advanced state for many of the countries.

Labour Force Survey

The methodological basis and the contents of this survey are described in the publication '*Labour Force Survey - Methods and Definitions*', 2001 edition. The main statistical objective of the Labour Force Survey is to divide the population of working age (generally 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.

Table 5

	A	B
EU-15 (1)	57 000	-
Belgium	2 500	4 500
Denmark	2 500	4 500
Germany	8 000	-
Greece	2 500	4 500
Spain	2 500	5 000
France	3 500	8 500
Ireland	2 500	4 500
Italy	3 500	7 500
Luxembourg	500	1 500
Netherlands	4 500	10 000
Austria	2 000	-
Portugal	7 500	15 000
Finland	2 500	4 500
Sweden (2)	2 500	-
United Kingdom	10 000	-
Bulgaria	5 500	10 000
Cyprus	500	1 500
Czech Republic	1 000	-
Estonia (3)	5 000	10 000
Hungary	2 500	4 500
Lithuania	5 000	-
Latvia	4 500	7 500
Malta	:	:
Poland	5 000	20 000
Romania	2 000	-
Slovak Republic	2 500	-
Slovenia	1 000	3 500
Turkey	:	:

A: threshold for publishing data.
B: threshold for reliable data.

(1) The limits applicable to data prior to 2001 are:
A: 9 000 B: - /
(2) The limits applicable to data prior to 2001 are:
A: 83 500 B: - /
(3) The limits applicable to data prior to 2000 are:
A: 4 000 B: 8 000 (1997); A: 1 500 B: 3 000 (1998-99)

It is important to note that the information is not collected from enterprises (as with the SBS database) but through a survey addressed to individual households. The National Statistical Institutes are responsible for selecting the sample, preparing the questionnaires, conducting the interviews 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.

The Community Labour Force Survey [5], is based upon a sample of the population. The results are therefore subject to the usual types of errors associated with sampling techniques. Eurostat implement basic guidelines intended to avoid the publication of figures which are statistically unreliable. Figures below these thresholds are not published. A second threshold is applied to data that may only be published with a warning concerning its reliability. These data are footnoted in the tables that use LFS data.

There was a methodological change between 1998 and 1999 in the collection of Belgian Labour Force Survey data. As such there may well be a rupture in the series in 1999.

There is currently no LFS data available for candidate countries on NewCronos. However, the development of these indicators is in an advanced state for many of the countries and data for candidate countries have already been published in the Statistics in Focus series (theme 3, 20/2002 - ISSN 1024-4352). Many data are already stored in the LFS production database.

National Accounts

The European System of National and Regional Accounts (1995 ESA, or simply: ESA) is an internationally compatible accounting framework for a systematic and detailed description of a total economy (that is a region, country or group of countries), its components and its relations with other economies.

[5] Council Regulation (EC) No. 577/98 of 9 March 1998 on the organisation of a labour force sample survey in the Community.

The 1995 ESA, replaces the European System of Integrated Economic Accounts published in 1970 (1970 ESA; a second, slightly modified, edition appeared in 1978).

The 1995 ESA is fully consistent with the revised world-wide guidelines on national accounting, the System of National Accounts (1993 SNA, or simply: SNA; these guidelines have been produced under the joint responsibility of the United Nations, the IMF, the Commission of the European Communities, the OECD and the World Bank). However, the ESA is focused more on the circumstances and data needs of the European Union. Like the SNA, the ESA is harmonised with the concepts and classifications used in many other, social and economic statistics. Cases in point are statistics on employment, statistics on manufacturing and statistics on external trade. The ESA can therefore serve as the central framework of reference for the social and economic statistics of the European Union and its Member States.

The ESA framework consists of two main sets of tables:
(a) the sector accounts;
(b) the input-output framework and the accounts by industry.
The sector accounts provide, by institutional sector, a systematic description of the different stages of the economic process: production, generation of income, distribution of income, redistribution of income, use of income and financial and non-financial accumulation. The sector accounts also include balance sheets to describe the stocks of assets, liabilities and net worth at the beginning and the end of the accounting period.

The input-output framework and the accounts by industry describe in more detail the production process (cost structure, income generated and employment) and the flows of goods and services (output, imports, exports, final consumption, intermediate consumption and capital formation by product group).

National Accounts data for the candidate countries are available within the NewCronos database. These data have been fully integrated into the database and are found alongside the data for the Member States. Candidate country information is provided for the main National Accounts aggregates, as well as more detailed sectoral breakdowns.

GLOSSARY OF TERMS

There follows a brief list of the main terms employed within this publication:

Annual average growth rate: constant rate of growth that would be required in each year to achieve the same overall growth rate as that observed between two periods.

Apparent labour productivity: value added at factor cost/number of persons employed (expressed in thousand EUR per person employed); care should be taken in the interpretation of this ratio between different activities and countries because of the use of a simple head count for the labour input measure, as a proxy for the volume of work done; values may exceptionally be negative.

Average personnel costs: personnel costs/number of employees (expressed in thousand EUR per employee).

Constant prices: data presented with the effect of price fluctuations over time removed from them (deflated series); note that, as these are expressed in EUR, time series are influenced by fluctuations in the exchange rate.

Cover ratio: exports/imports (expressed as a percentage).

Current prices: data presented including the effects of price changes.

Domestic output price index: an index of the prices of commodities produced and sold within any given country in national currency terms; output price indices are often used to deflate production and value added data (in value) in order to obtain production and value added in constant price terms; this index shows the change in ex-works selling prices of all products sold on domestic markets, excluding VAT and similar deductible taxes.

Employees: are defined as those persons who work for an employer and who have a contract of employment and receive compensation in the form of wages, salaries, fees, gratuities, piecework pay or remuneration in kind; employees include part-time workers, seasonal workers, persons on strike or on short-term leave, but exclude those persons on long-term leave and voluntary workers.

Enterprise: an enterprise is the smallest combination of legal units that is an organisational unit producing goods or services, which benefits from a certain degree of autonomy in decision-making, especially for the allocation of its current resources; an enterprise carries out one or more activities at one or more locations; an enterprise may be a sole legal unit.

Extra-EU exports: goods which leave the statistical territory of a Member State bound for a non-Community country.

Extra-EU imports: goods which enter the statistical territory of a Member State from a non-Community country.

Gross operating surplus: is the surplus generated by operating activities after the labour factor input has been recompensed; it can be calculated from value added at factor cost less personnel costs.

Gross operating rate: gross operating surplus/turnover (profitability measure, expressed as a percentage).

Local unit: the local unit is an enterprise or part thereof (e.g. a workshop, factory, warehouse, office, mine or depot) situated in a geographically identified place. At or from this place economic activity is carried out for which - save for certain exceptions - one or more persons work (even if only part-time) for one and the same enterprise.

Number of persons employed (employment): is defined as the total number of persons who work in the observation unit (inclusive of working proprietors, partners working regularly in the unit and unpaid family workers), as well as persons who work outside the unit who belong to it and are paid by it (e.g. sales representatives, delivery personnel, repair and maintenance teams); it includes persons absent for a short period (e.g. sick leave, paid leave or special leave), and also those on strike, but not those absent for an indefinite period; it also includes part-time workers who are regarded as such under the laws of the country concerned and who are on the pay-roll, as well as seasonal workers, apprentices and home workers on the pay-roll.

Personnel costs: the total remuneration, in cash or in kind, payable by an employer to an employee (regular and temporary employees as well as home workers) in return for work done by the latter during the reference period; personnel costs also include taxes and employees' social security contributions retained by the unit as well as the employer's compulsory and voluntary social contributions.

Production value: measures in value the amount actually produced by the unit, based on sales adjusted for changes in stocks and the resale of goods and services; the production value is defined as turnover, plus or minus the changes in stocks of finished products, work in progress and goods and services purchased for resale, minus the purchases of goods and services for resale, plus capitalised production, plus other operating income (excluding subsidies).

Simple wage adjusted labour productivity: value added at factor cost/personnel costs * 100 (expressed as a percentage).

Trade balance: exports - imports.

Turnover: comprises the totals invoiced by the observation unit during the reference period, corresponding to 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 the VAT invoiced by the unit vis-à-vis its customer and other similar deductible taxes directly linked to turnover; it also includes all other charges (transport, packaging, etc.) passed on to the customer, even if these charges are listed separately in the invoice; reductions in prices, rebates and discounts as well as the value of returned packing must be deducted.

Value added at factor cost: can be calculated from turnover, plus capitalised production, plus other operating income, plus or minus the changes in stocks, minus the purchases of goods and services, minus other taxes on products which are linked to turnover but not deductible, minus the duties and taxes linked to production; alternatively it can be calculated from gross operating surplus by adding personnel costs; income and expenditure classified as financial or extra-ordinary in company accounts is excluded from value added.

Value added specialisation: relative index that compares the value added share of a given manufacturing activity in total manufacturing value added for a given country with the same ratio for the EU (expressed as a percentage - if a country displays a ratio above 100 then it is relatively more specialised than the average for the EU).

Wage adjusted labour productivity: (value added at factor cost/personnel costs) * (number of employees/number of persons employed) * 100 (expressed as a percentage).

ABBREVIATIONS

Countries

EU	European Union
EU-15	Fifteen Member States of the European Union
B	Belgium
BENELUX	Belgium, the Netherlands and Luxembourg
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
BG	Bulgaria
CY	Cyprus
CZ	Czech Republic
EE	Estonia
HU	Hungary
LV	Latvia
LT	Lithuania
MT	Malta
PL	Poland
RO	Romania
SK	Slovakia
SI	Slovenia
TR	Turkey
CH	Switzerland
EEA	European Economic Area
IS	Iceland
JP	Japan
NO	Norway
US	United States (of America)

Professional trade associations

ACEA	Association des Constructeurs Européens d'Automobiles
ACI	Airports Council International (European Region)
AEA	Association of European Airlines
AECMA	Association Européenne des Constructeurs de Matériel Aérospatial
AESGP	Association of the European Self–Medication Industry
APEAL	The Association of European Producers of Steel for Packaging
APME	Association of Plastics Manufacturers in Europe
AWES	Association of European Shipbuilders and Shiprepairers
CAEF	Comité des Associations Européennes de Fonderie
CAOBISCO	Association of the Chocolate, Biscuit & Confectionery Industries of the EU
CBMC	Brewers of Europe
CECCM	Confederation of European Community Cigarette Manufacturers
CEPI	Confederation of European Paper Industries
Cerame-Unie	Liaison Office of the European Ceramic Industry
CIAA	Confédération des Industries Agro-alimentaires de la CE
CPDP	Comité Professionnel du Pétrole
CPIV	Comité Permanent de l'Industrie du Verre de la CEE
ECMT	European Conference of Ministers of Transport
EDA/ZMP	Europäischer Milchindustrieverband/Zentrale Markt- und Preisberichtstelle der Land- und Ernährungswirtschaft
EFCA	European Federation of Engineering Consultancy Associations
EMF	European Mortgage Federation (and national associations)
EOS	European Organisation of the Sawmill Industry
ERMCO	European Ready Mixed Concrete Association
ESBG	European Savings Bank Group
ESOMAR	European Society for Opinion and Marketing Research
ESTA	European Security Transport Association
EURATEX	European Apparel and Textile Organisation
FBE	Fédération Bancaire Européenne
FEA	European Aerosol Federation
FEACO	Fédération Européenne des Associations de Conseil en Organisation
Fediol	Fediol - EC Seed Crushers' and Oil Processors' Federation
FEDMA	Federation of European Direct Marketing
FEFSI	Fédération Européenne des Fonds et Sociétés d'Investissement
FEP	European Federation of the Parquet Industry
FEVE	Fédération Européenne du Verre d'Emballage
FIBV	Fédération Internationale des Bourses de Valeurs
FIEC	Fédération de l'Industrie Européenne de la Construction
GEBC	Groupement Européen des Banques Coopératives
IAAPA	International Association of Amusement Parks and Attractions
IACA	International Air Carrier Association
ICAO	International Civil Aviation Organization, European and North Atlantic Office
IMACE	International Margarine Association of the Countries of Europe
ISL	Institute of Shipping Economics and Logistics
Leaseurope	European Federation of Leasing Company Associations
STD	Swedish Federation of Consulting Engineers and Architects (Svensk Teknik och Design)
UIC	Union Internationale des Chemins de Fer
UITP	Union Internationale des Transports Publics
UNAFPA	Union des Associations de Fabricants de Pâtes Alimentaires de la Communauté Européene
UNESDA	Union of EU Soft Drinks Associations

Other organisations and publications

EITO	European Information Technology Observatory
IISI	International Iron and Steel Institute
LME	London Metal Exchange Limited
UN	United Nations
USGS	US Geological Survey
WTO	World Tourism Organisation
WTO	World Trade Organization
ITU	International Telecommunication Union
UNEX	Unipost External Monitoring System, International Post Corporation
Media Salles	Media Salles
EAO	European Audiovisual Observatory
CTcon	CTcon
Software Magazine	Software Magazine, Wiesner Publishing, Framingham, Mass., USA
The Bankers' Almanac	The Bankers' Almanac
International Insurance Facts	Insurance Information Institute
Zenithmedia	Zenithmedia Western European Market and Mediafact
meatnews.com	Meatnews.com & Meat Processing Global
PricewaterhouseCoopers	PricewaterhouseCoopers 2002 Global Forest and Paper Survey
McGraw-Hill	Engineering News-Record, McGraw-Hill
Hotels Magazine	Hotels Magazine
Containerisation Yearbook	Containerisation Yearbook

Statistical abbreviations

CIS	Community Innovation Survey
COICOP	Classification Of Individual Consumption according to Purpose
CPA	Classification of Products by Activity
ECHP	European Community Household Panel
FATS	Foreign Affiliates Trade Statistics
FDI	Foreign Direct Investment
HBS	Household Budget Survey
LFS	Labour Force Survey
NACE	Nomenclature statistique des Activités économiques dans la Communauté Européenne (Statistical Classification of economic activities in the European Community)
n.e.c.	not elsewhere classified
Prodcom	PRODucts of the European COMmunity
SBS	Structural Business Statistics
SME	Small and medium sized enterprise
ZPA1	Eurostat's agricultural products database

Other abbreviations

ABS	Antilock Braking System
AM	After-Market
ATC	Agreement on Textiles and Clothing
ATM	Automatic Teller Machine
BSE	Bovine Spongiform Encephalopathy (Mad-cow disease)
CD-ROM	Compact disc read-only memory
CFP	Common Fisheries Policy
DIY	Do-It-Yourself
DTP	Desk-top Publishing
DVD	Digital Versatile Disc
ECSC	European Coal and Steel Community
EEE	Electrical and Electronic Equipment
EER	Energy Efficiency Requirements
GDP	Gross Domestic Product
ICT	Information and Communications Technologies
ISDN	Integrated Services Digital Network
IT	Information Technology
JIT	Just In Time
MDF	Medium Density Fibreboard
NASDAQ	National Association of Securities Dealers' Quotation System
n.p.r.s.	not put up in form for retail sale
NYSE	New York Stock Exchange
OE	Original Equipment
OJ	Official Journal (of the European Communities)
OPT	Outward Processing Trade
OSB	Oriented StrandBoard
PC	Personal Computer
p.r.s.	put up in form for retail sale
PVC	Polyvinyl Chloride
R & D	Research and Development
TENs	Trans-European Networks
TGV	Train à Grand Vitesse (High-speed train)
TV	Television
VAT	Value Added Tax
WEEE	Waste Electrical and Electronic Equipment

Weights and measures

AAGR	Average Annual Growth Rate
CGT	Compensated Gross Tonnes
DWT	Dead-Weight-Tonnes
GW	Gigawatt (10^6 kW)
Ha	Hectare (ten thousand square metres)
Hl	Hectolitre (hundred litres)
Kg	Kilogram(s)
Km	Kilometre
Kms	Kilometres
M	Metre
MW	Megawatt (10^3 kW)
PPS	Purchasing Power Standard
RPK	Revenue Passenger Kilometres
TEU	Twenty Foot Equivalent Unit
TOE	Tonne of Oil Equivalent (41 868 kilojoules net calorific value per kilogram)
TU	Tonnes of contained Uranium
TW	Terawatt (10^9 kW)

Currencies

EUR	Euro
BEF	Belgian Franc
DKK	Danish Krone
DEM	German Mark
GRD	Greek Drachma
ESP	Spanish Peseta
FRF	French Franc
IEP	Irish Pound
ITL	Italian Lira
LUF	Luxembourg Franc
NLG	Dutch Guilder
ATS	Austrian Schilling
PTE	Portuguese Escudo
FIM	Finnish Markka
SEK	Swedish Krone
GBP	Pound sterling
BGN	New bulgarian Lev
CYP	Cyprus Pound
CZK	Czech Koruna
EEK	Estonian Kroon
HUF	Hungarian Forint
LTL	Lithuanian Litas
LVL	Latvian Lats
MTL	Malta Lira
PLN	New Polish Zloty
ROL	Romanian Leu
SIT	Slovenian Tolar
SKK	Slovak Koruna
TRL	Turkish Lira
JPY	Japanese Yen
USD	US Dollar

Symbols

:	not available
-	not applicable

Overview - the EU's business economy

INTRODUCTION

One of the most common measures of living standards is gross domestic product (GDP) per head. In order to make comparisons more meaningful it is usual to adjust this ratio to account for different price levels between countries and to therefore express the series in terms of purchasing power standards (PPS). GDP per capita in the EU averaged PPS 23 200 in 2001 (or EUR EUR 23 210 per head). Among the Member States, GDP per capita in PPS terms ranged from just over two thirds (68 %) of the EU average in Greece to almost double (197 %) the average in Luxembourg. The figure for Luxembourg was well ahead of Denmark and Ireland (the second and third placed countries), where GDP per inhabitant was some 18 % above average – see Figure 1.

According to national accounts, the EU economy generated EUR 8 200 billion of value added in 2001. This figure can be split between six major branches – see Table 1 – with the relative importance of agriculture, hunting, forestry and fishing (2.1 % of total value added) and construction (5.4 %) being fairly limited compared to the other branches [1].

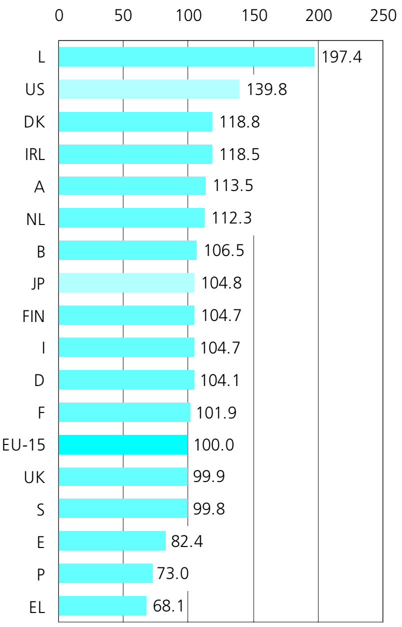
[1] Please note that agriculture, fishing and forestry (NACE Sections A and B), as well as public administration, community, social and personal services (NACE Sections L to Q) are generally not covered by this publication, as large parts of them are not usually covered by European business statistics, which are generally limited to NACE Sections C to K. Selected parts of other community, social and personal services (NACE Section O) are found in Chapters 13, 14 and 24.

The respective shares of the three service branches in total value added all rose between 2000 and 2001, while the share of industry (NACE Sections C to E) fell by 0.7 percentage points. This continued an established trend of the EU economy becoming increasingly dominated by the service sector.

Between 1991 and 2001 financial intermediation and business services (NACE Sections J and K) gained 3.0 percentage points of total value added, while distributive trades, hotels and restaurants, transport, storage and communications (NACE Sections G, H and I) gained 0.8 points. On the other hand, the share of industry fell by 2.5 points, construction by 0.9 points and that of agriculture, hunting, forestry and fishing by 0.6 points.

Figure 1

GDP per inhabitant, 2001 (EU-15=100) (1)



(1) At current market prices and PPS; L, UK and JP, forecasts.
Source: Eurostat, National Accounts - ESA95 - aggregates (theme2/aggs).

Table 1

Breakdown of GDP in the EU, 2001 (%)

NACE label (NACE code)	
Agriculture, hunting, forestry & fishing (A & B)	2.1
Mining & quarrying; manufacturing; electricity, gas & water supply (C to E)	22.1
Construction (F)	5.4
Distributive trades; hotels & restaurants; transport, storage & communication (G to I)	21.6
Financial intermediation; real estate, renting & business activities (J & K)	27.2
Public administration, community, social & personal services (L to Q)	21.7

Source: Eurostat, National Accounts - Breakdowns by branch of activity (theme2/brkdowns).

The progressive shift towards a service-orientated economy is represented in Figure 2, with the two fastest growing sectors (in constant price terms) both part of the market services' economy. The value added generated by the financial intermediation and business services sector grew at an average rate of 3.1 % per annum between 1991 and 2001, and was followed by distributive trades, hotels and restaurants, transport, storage and communications (2.7 % growth per annum).

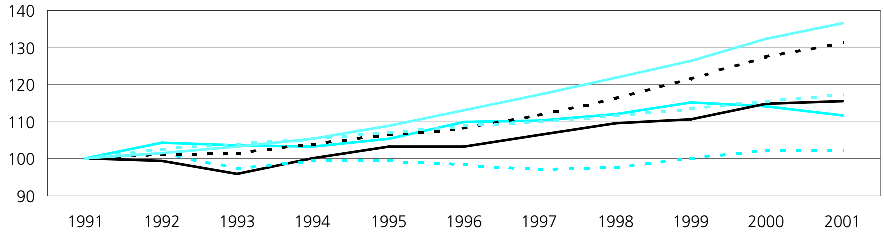
Although growth in the other branches of the EU economy was not as fast, it did, on average, remain positive during the 10–year period from 1991 to 2001. Industry and construction experienced the largest downturns in activity during 1993, with industry recovering at a much more rapid pace during the second half of the 1990s, resulting in average growth of 1.5 % per annum for the whole of the period from 1991 to 2001.

The increasing importance of the service sector may, in part, be attributed to manufacturers and other service enterprises switching from in-house provision to external suppliers of services such as accounting, IT services, advertising, training, management consultancy, security, catering or cleaning. This trend is often referred to as outsourcing and may, at least in part, explain the rapid growth of the business service sectors during the 1990s.

At the same time, manufacturing enterprises have tended to relocate their production, with relatively high wages, free trade and developments in communications driving output away from the EU towards low labour cost regions, particularly for more standardised products. Manufacturers within the EU increasingly concentrate on higher added value tasks, for example in the areas of research, design and development.

Figure 2

Breakdown of development of GDP in constant prices in the EU (1991=100)



Source: Eurostat, National Accounts - Breakdowns by branch of activity (theme2/brkdowns).

Figure 3

Breakdown of the labour force by employment status, 2001 (share of persons aged 15 or more) (1)

(1) NACE Sections A to Q.
Source: Eurostat, Labour Force Survey.

According to the labour force survey (LFS) [(2)], there were 310 million persons aged 15 years and above living in the EU in 2001; of these, some 174 million were either employed or seeking work, while the remaining 136 million were inactive (retired, in education, chose not to work, etc.) – see Figure 3. The activity rate measures the share of those employed in the total population aged between 15 and 64. In 2001, this ratio ranged from 60.3 % in Italy up to 79.2 % in Denmark; the EU average was 69.0 %. Higher activity rates tend to generate on the one hand more revenue for governments, while at the same time removing some of the social security burden, as persons (re-)join the labour force.

[(2)] The use of the Labour Force Survey, which is based on a household survey, may produce quite different results to those obtained through enterprise surveys that are the basis for the vast majority of the statistics presented in this publication.

Approximately one in six (18.0 %) persons in the EU were working on a part-time basis in 2001 – see Figure 4. Part-time employment accounted for less than 10 % of employment in just three of the Member States: Greece, Spain and Italy. The share of part–time employment was higher than average in Denmark, Germany, Sweden and the United Kingdom (all between 20 and 25 %), and significantly higher in the Netherlands (42.2 %).

There were considerable differences between Member States as regards the share of women in the total number of persons employed in 2001. The highest shares (at least 45 %) were registered in Denmark, the Netherlands, Portugal, Finland, Sweden and the United Kingdom. The EU average stood at 42.9 %, while three countries were below the threshold of 40 % (Greece, Spain and Italy).

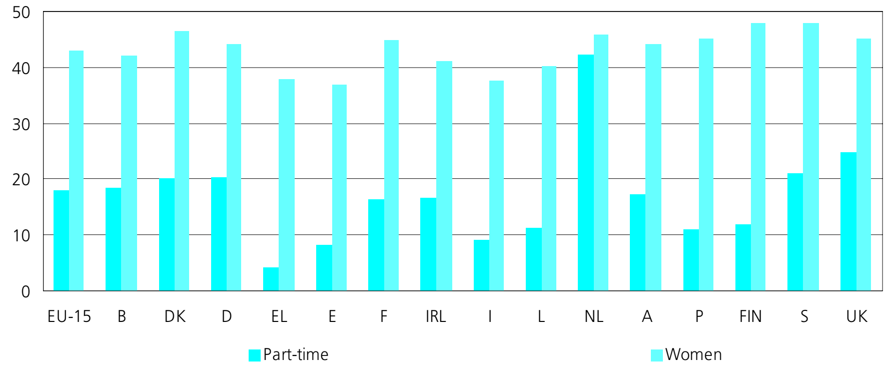
The service sector (NACE Sections G to Q) accounted for the majority of jobs in the EU in 2001, with just over two thirds (67.2 %) of those employed – see Figure 5. There were six countries where services accounted for more than 70 % of total employment, the highest share being recorded in Luxembourg (77 %). The shift towards services, evident for value added, was also present when studying the evolution of employment within the EU. Between 1995 and 2001 the number of persons employed in the service sector rose in every Member State, with the share of services in total employment increasing in every country, except Portugal. By 2001, Portugal was the only country to report that services did not account for more than 60 % of total employment.

There were large differences in the importance of the agriculture, hunting, forestry and fishing sectors (NACE Sections A and B): ranging from less than 2 % of total employment in Belgium, Luxembourg and the United Kingdom to 13 % of employment in Portugal and 16 % in Greece. The industrial and construction sectors (NACE Sections C to F) generally accounted for between 20 and 30 % of total employment, with their share rising above 30 % in Germany, Spain, Italy and Portugal.

Between 1995 and 2001 there was a 13 million net increase in the number of persons employed in the EU, with services accounting for 12.7 million of the net increase – see Table 2. The largest net gains were made by public administration, community, social and personal services (NACE Sections L to Q) and financial intermediation, real estate, renting and business activities (NACE Sections J and K), where employment in the EU rose by 5.1 million and 4.4 million respectively over the period considered. The only branch to register a net reduction in the number of persons employed was agriculture, hunting, forestry and fishing, with a decline of 1.1 million.

Figure 4

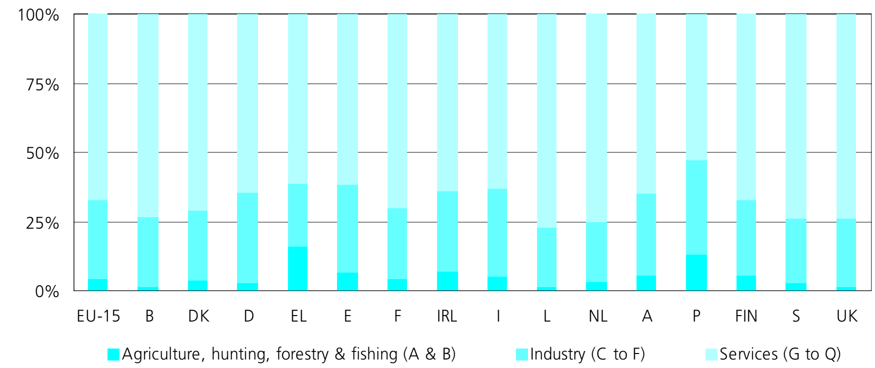
Labour force characteristics, 2001 (% share of those employed aged 15 or more) (1)



(1) NACE Sections A to Q.
Source: Eurostat, Labour Force Survey.

Figure 5

Breakdown of persons in employment by activity, 2001 (share of those employed aged 15 or more)



Source: Eurostat, Labour Force Survey.

Table 2

Evolution of total employment in the EU (millions)

NACE label (NACE code)	1995	2001	Share (%) 1995	Share (%) 2001	Growth rate, 2001/1995 (%)	Average annual growth rate, 1995-2001 (%)
Total (A to Q)	148.0	160.9	100.0	100.0	8.8	1.7
Agriculture, hunting, forestry & fishing (A & B)	7.8	6.7	5.3	4.2	-14.5	-3.1
Mining & quarrying; manufacturing; electricity, gas & water supply (C to E)	33.1	33.4	22.4	20.8	1.0	0.2
Construction (F)	11.6	12.7	7.9	7.9	9.4	1.8
Distributive trades; hotels & restaurants; transport, storage & comm. (G to I)	37.1	40.3	25.1	25.0	8.4	1.6
Financial intermediation; real estate, renting & business activities (J & K)	15.5	19.9	10.5	12.4	28.5	5.1
Public administration, community, social & personal services (L to Q)	42.8	47.9	28.9	29.8	12.0	2.3

Source: Eurostat, Labour Force Survey.

INTANGIBLES AND GLOBALISATION

Traditional economic theories were often based upon the exchange of tradable, physical goods in a one-to-one relationship. In recent years, intangibles (non-material factors) have been considered as playing an increasing role in determining economic performance. The exploitation of property rights, brands, R & D, know-how, skills and supply networks are thought to be some of the key drivers of intangible wealth creation.

At the Lisbon European Council in March 2000, the European Union set itself the ambitious goal '*to become the most competitive and dynamic knowledge-driven economy in the world*' by 2010. Enterprise policy is one area that will play a major role in setting the conditions for this objective to be met. In order to measure business performance, a benchmarking initiative was set up at the request of the Lisbon Council. The structural indicators' database was launched in the European Commission's Communication '*Realising the potential of the European Union – Consolidating and extending the Lisbon strategy*'[(3)]. Table 3 shows some selected indicators from this database. The aim of the database is to act as a tool, whereby countries can seek to improve their own performance (to the benefit of the whole EU) by comparing themselves with other Member States and adapting their enterprise policy to reflect best practices identified in other countries.

Globalisation encompasses a wide range of issues, such as the development of intra-enterprise trade, financial flows, forms of linkages between businesses and cross-border operations. Multi-national enterprises and networks are at the core of the process, acting as economic agents controlling or interacting with entities situated in different countries. The qualitative nature of information required to define a group's perimeter can often make it difficult to obtain reliable statistical information (such as the statistical system stands today). One of the key constraints is that global enterprises make their decisions against a worldwide backdrop, while these decisions continue to be analysed using national data collections truncated by geographical borders.

[(3)] COM(2001) 79. Eurostat's structural indicators homepage may be found at: http://www.europa.eu.int/comm/eurostat/Public/datashop/print-product/EN?catalogue=Eurostat&product=1-structur-EN&mode=download

Table 3

Selected structural indicators

	Business enterprise R&D expenditure relative to GDP, 2001 (%) (1)	Number of patent applications at the EPO per million inhabitants, 2000 (units) (2)	Venture capital investment relative to GDP - early stage, 2001 (%) (3)
EU-15	1.28	152.7	0.05
B	1.45	151.2	0.04
DK	1.32	169.5	0.08
D	1.80	296.8	0.06
EL	0.19	5.2	0.02
E	0.52	22.1	0.02
F	1.36	139.7	0.04
IRL	0.88	87.6	0.03
I	0.53	72.3	0.02
L	1.19	170.9	:
NL	1.14	217.7	0.04
A	1.14	154.1	0.02
P	0.17	3.9	0.01
FIN	2.68	320.3	0.10
S	2.84	346.4	0.10
UK	1.21	124.0	0.06
JP	2.11	148.5	:
US	2.04	158.2	0.14

(1) B, DK, F, L and US, 2000; EL, IRL, NL, P and S, 1999; A, 1998; B, FIN and UK, forecast; DK, D and F, estimate; US and L, provisional; EU-15, Eurostat estimate.
(2) All values are provisional.
(3) US, Eurostat estimate.
Source: Eurostat, Structural indicators (theme1/strind).

Many enterprises have concentrated on extending their operations beyond national borders in an attempt (among other things) to circumvent trade barriers, increase proximity to customers, reduce costs (labour, transportation or other inputs), guarantee a supply of materials or avoid regulations. Such changes in business structure, conduct and performance have created significant challenges for national statistical systems.

Foreign affiliates trade statistics (FATS) is a data collection exercise that measures the commercial presence of enterprises in the territory of another country. The statistics describe the overall activity of foreign controlled enterprises and have been developed for inward FATS – in other words, foreign owned affiliates in the reporting economy. Table 4 provides some of the main results from this study.

Table 4

Main indicators for foreign affiliates trade statistics, 1998 (1)

	Nationally owned	Foreign owned	Non-EU foreign owned
Value added at factor cost (million EUR)			
DK	66 734	8 518	:
NL	143 931	26 865	14 427
FIN	49 421	6 788	2 934
S	98 272	18 889	8 819
UK	540 963	100 858	:
Number of persons employed (units)			
DK	1 317 464	111 194	:
NL	3 948 904	412 477	184 228
FIN	972 426	119 264	47 073
S	2 090 256	327 904	142 794
UK	:	:	:

(1) NACE Section C to K, excluding Section J.
Source: Eurostat, Structural Business Statistics (theme4/sbs/fats).

STRUCTURAL BUSINESS STATISTICS

Structural business statistics (SBS) provide the majority of data used in this publication. The data are collected within the legal framework provided by the SBS regulation [4]. Figures relating to enterprises of all sizes (with one or more persons employed) [5] are used in this publication to provide a snapshot of the latest situation in the EU's business economy for the reference year 2000.

A second collection of SBS data provides a longer time-series, but only for industrial enterprises with 20 or more persons employed [6]. In this publication these figures are used to provide a comparison of the evolution of the manufacturing sector.

A SNAPSHOT OF THE EU'S BUSINESS ECONOMY

Estimates based on SBS data suggest that the value added of the EU's business economy (NACE Sections C to K) was EUR 4 700 billion in 2000, while there were over 100 million persons employed.

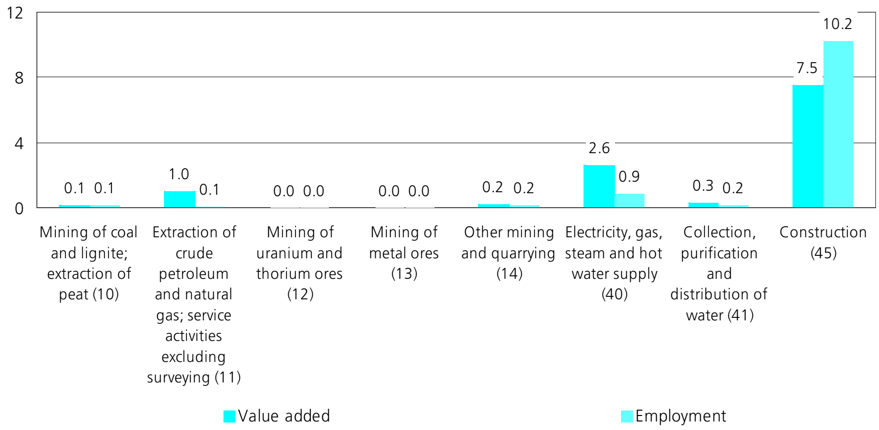
At the NACE section level, manufacturing was the largest activity, accounting for 31.2 % of value added and 27.7 % of employment. These two shares imply that the manufacturing sector is relatively productive when compared to the average performance of the whole economy. However, the remaining industrial activities were even more productive, as mining and quarrying accounted for a 1.4 % share of total value added, but just 0.4 % of employment, and electricity, gas and water supply was responsible for generating 2.9 % of total value added, while employing 1.0 % of the workforce. These figures may be explained in part by the transformation of the industrial base, as enterprises increasingly specialise in skills-intensive sectors, while low-skilled, labour-intensive activities have been driven out to lower cost countries.

This switch in productive capacity has also brought with it a change in demand between businesses, most notably an increase in the demand for business services. Real estate, renting and business activities generated 17.9 % of value added (the highest share among service sectors), while employing 17.0 % of the total. Financial intermediation accounted for 8.5 % of the EU's value added in 2000, while employing 5.1 % of those working.

Looking in more detail, at the two–digit level of NACE, construction (NACE Division 45) was by far the largest non-manufacturing industrial activity in every Member State in 2000, accounting on average for 7.5 % of the value added generated in the EU's business economy and 10.2 % of those employed – see Figure 6. The next largest activity was usually the supply of electricity, gas, steam and hot water (NACE Division 40), although in Denmark and the United Kingdom the extraction of petroleum and gas (NACE Division 11) generated more value added. The extraction of petroleum and gas was also relatively important in the Netherlands, where it generated almost as much value added as the supply of electricity, gas, steam and hot water – see Table 5.

Figure 6

Breakdown of activity in non-manufacturing industrial sectors in the EU, 2000 (% share of business economy) (1)



(1) Based on NACE Divisions 10 to 14 and 40, 41 and 45; estimates.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Table 5

Three largest non-manufacturing industrial sectors, 2000 (1)

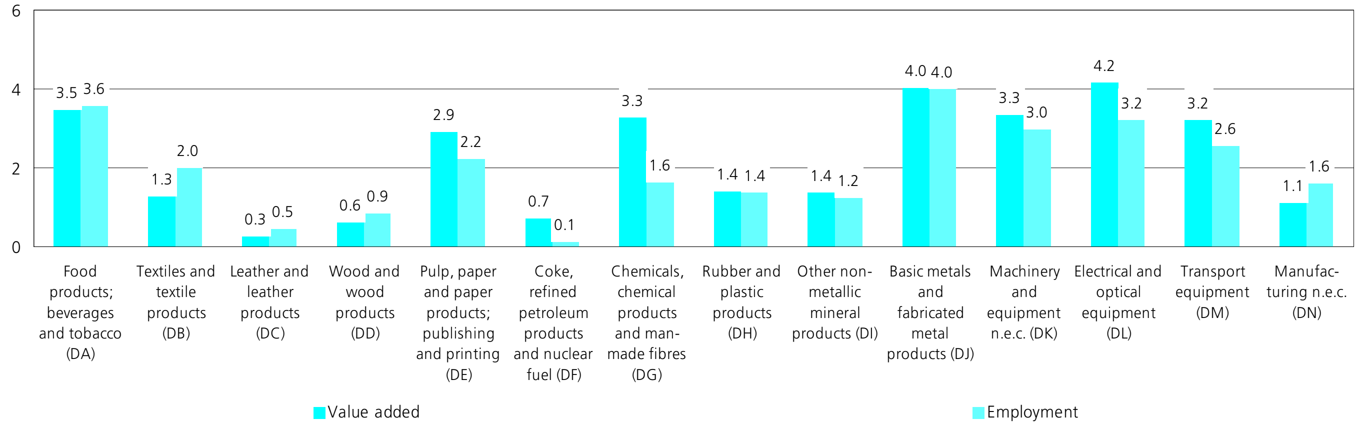
	Largest	Second largest	Third largest
EU-15	Construction	Electricity, gas, steam & hot water	Extraction of petroleum & gas
B	Construction	Electricity, gas, steam & hot water	Collection, purification & distribution of water
DK	Construction	Extraction of petroleum & gas	Electricity, gas, steam & hot water
D	Construction	Electricity, gas, steam & hot water	Mining of coal & lignite; extraction of peat
EL	Construction	Electricity, gas, steam & hot water	Other mining and quarrying
E	Construction	Electricity, gas, steam & hot water	Collection, purification & distribution of water
F	Construction	Electricity, gas, steam & hot water	Collection, purification & distribution of water
IRL	Construction	Electricity, gas, steam & hot water	Mining of coal & lignite; extraction of peat
I	Construction	Electricity, gas, steam & hot water	Extraction of petroleum & gas
L	Construction	Electricity, gas, steam & hot water	Other mining and quarrying
NL	Construction	Electricity, gas, steam & hot water	Extraction of petroleum & gas
A	Construction	Electricity, gas, steam & hot water	Other mining and quarrying
P	Construction	Electricity, gas, steam & hot water	Collection, purification & distribution of water
FIN	Construction	Electricity, gas, steam & hot water	Collection, purification & distribution of water
S	Construction	Electricity, gas, steam & hot water	Mining of metal ores
UK	Construction	Extraction of petroleum & gas	Electricity, gas, steam & hot water

(1) Based on value added for non-manufacturing industrial sectors (NACE Divisions 10 to 14 and 40, 41 and 45); estimates.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

(4) Council Regulation (EC, EURATOM) No. 58/97 of 20 December 1996 concerning structural business statistics.
(5) These data can be found on Eurostat's NewCronos database at: theme4/sbs/enterpr/enter_ms.
(6) These data can be found on Eurostat's NewCronos database at: theme4/sbs/enterpr/ent_l_ms.

Figure 7

Breakdown of activity in manufacturing sectors in the EU, 2000 (% share of business economy) (1)



(1) Based on NACE Subsections DA to DN; estimates.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Within the manufacturing sector, the three largest activities (in terms of value added) were machinery and equipment (NACE Division 29), food products and beverages (NACE Division 15) and chemicals and chemical products (NACE Division 24) – see Figure 7. At least two of these three activities appeared in the ranking of the three largest manufacturing activities in 10 of the Member States. However, manufacturing in Greece, Luxembourg, Portugal, Finland and Sweden was more concentrated in activities that did not have such a predominant position in the EU as a whole. In the larger Member States, Germany reported a higher than average share of its output concentrated within the manufacture of motor vehicles, France and Italy produced more fabricated metal products than average and the share of publishing and printing was relatively high in the United Kingdom – see Table 6.

Table 6

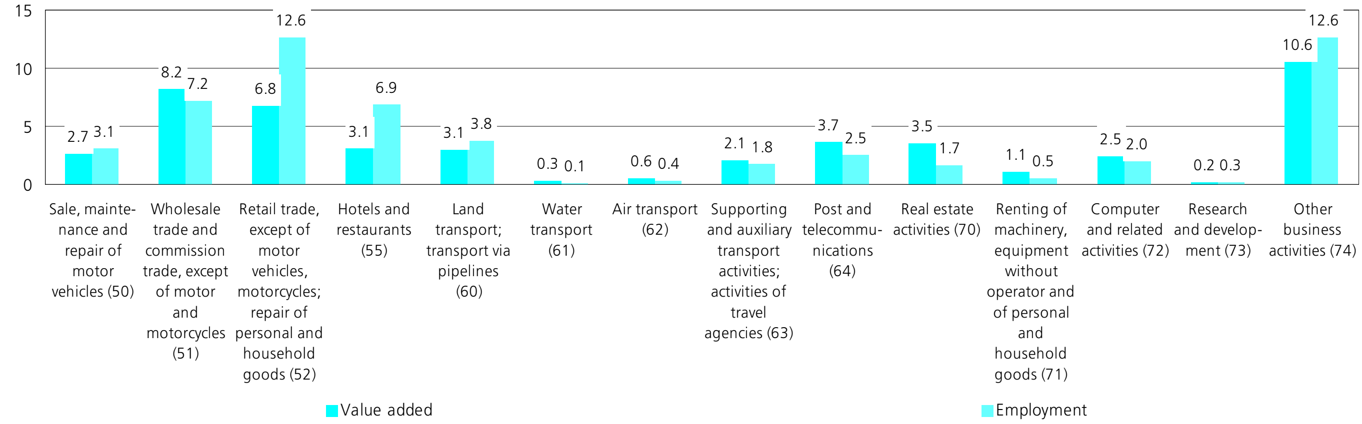
Three largest manufacturing sectors, 2000 (1)

	Largest	Second largest	Third largest
EU-15	Machinery & equipment n.e.c.	Food products & beverages	Chemicals & chemical products
B	Chemicals & chemical products	Food products & beverages	Basic metals
DK	Food products & beverages	Machinery & equipment n.e.c.	Chemicals & chemical products
D	Machinery & equipment n.e.c.	Motor vehicles	Chemicals & chemical products
EL	Food products & beverages	Textiles	Coke, petroleum & nuclear fuel
E	Food products & beverages	Fabricated metal products	Chemicals & chemical products
F	Food products & beverages	Chemicals & chemical products	Fabricated metal products
IRL	Chemicals & chemical products	Food products & beverages	Publishing & printing
I	Machinery & equipment n.e.c.	Fabricated metal products	Food products & beverages
L	Basic metals	Rubber & plastic products	Fabricated metal products
NL	Food products & beverages	Chemicals & chemical products	Publishing & printing
A	Machinery & equipment n.e.c.	Coke, petroleum & nuclear fuel	Food products & beverages
P	Food products & beverages	Other non-metallic minerals	Textiles
FIN	Radio, TV & communications	Pulp, paper & paper products	Machinery & equipment n.e.c.
S	Motor vehicles	Machinery & equipment n.e.c.	Pulp, paper & paper products
UK	Food products & beverages	Publishing & printing	Chemicals & chemical products

(1) Based on value added for manufacturing (NACE Divisions 15 to 37); estimates.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 8

Breakdown of activity in service sectors in the EU, 2000 (% share of business economy) (1)



(1) Based on NACE Divisions 50 to 64 and 70 to 74; estimates.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Within the service sector the three largest activities (still at the two–digit level of NACE) were generally wholesale trade (NACE Division 51), retail trade (NACE Division 52) and other business activities (NACE Division 74). The latter two activities both accounted for a particularly high share of total employment, 12.6 % of those employed in the EU. However, in terms of value added, wholesale trade was more important than retail trade – see Figure 8. Considering the individual Member States, other business activities and wholesale trade were the two largest sectors in terms of value added generated in every country in 2000, except for Ireland and Portugal, where retail trade displaced other business activities. In the remaining countries, retail trade was usually the third most important activity, except in Greece (hotels and restaurants), Luxembourg (post and telecommunications) and Sweden (real estate activities) – see Table 7.

The promotion of small and medium-sized enterprises (SMEs) is thought to be fundamental when fostering an environment that encourages economic growth and job opportunities. The size class domain of the SBS database provides information on the enterprise size structure within the EU's business economy in 1999. SMEs are found to be particularly important in the activities of hotels and restaurants, construction, distributive trades and real estate, renting and business activities, where they provide employment to a large number of persons – see Table 8.

Table 7

Three largest service sectors, 2000 (1)

	Largest	Second largest	Third largest
EU-15	Other business activities	Wholesale trade	Retail trade
B	Wholesale trade	Other business activities	Retail trade
DK	Wholesale trade	Other business activities	Retail trade
D	Other business activities	Wholesale trade	Retail trade
EL	Other business activities	Wholesale trade	Hotels and restaurants
E	Wholesale trade	Other business activities	Retail trade
F	Other business activities	Wholesale trade	Retail trade
IRL	Retail trade	Wholesale trade	Other business activities
I	Other business activities	Wholesale trade	Retail trade
L	Other business activities	Wholesale trade	Post and telecommunications
NL	Wholesale trade	Other business activities	Retail trade
A	Wholesale trade	Other business activities	Retail trade
P	Wholesale trade	Retail trade	Other business activities
FIN	Wholesale trade	Other business activities	Retail trade
S	Wholesale trade	Other business activities	Real estate activities
UK	Other business activities	Wholesale trade	Retail trade

(1) Based on value added for services (NACE Divisions 50 to 64 and 70 to 74); estimates.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Indeed, SMEs employed as many as 87 % of the EU's workforce in the construction sector in 1999, 80 % of those employed in hotels and restaurants and 72 % in distributive trades. Transport, storage and communication was the only NACE section to report that SMEs did not employ more than 50 % of its workforce – see Table 9.

The apparent labour productivity of micro enterprises was below the average of all enterprises for each NACE section except in real estate, renting and business activities, where micro-enterprises accounted for 32.2 % of employment, but generated 33.9 % of value added.

In the construction, distributive trades and hotels and restaurants sectors, there was no significant difference in apparent labour productivity of small, medium or large-sized enterprises. Real estate, renting and business activities reported that apparent labour productivity in the EU increased between micro, small and medium-sized enterprises before tailing off for large enterprises. There were, however, two sectors that did report increasing apparent labour productivity returns for larger enterprises, namely manufacturing and transport, storage and communication. Both of these activities often require significant capital investment to set up efficient production lines or maintain national networks at a minimum efficient scale.

Table 8

Importance of small enterprises in the value added of manufacturing activities in the EU, 2000 (% share of enterprises with less than 20 persons employed) (1)

NACE label (NACE code)	Share of enterprises with <20 persons employed in total value added (%)
Food products and beverages (15)	15.3
Tobacco products (16)	0.2
Textiles (17)	19.1
Wearing apparel; dressing; dyeing of fur (18)	27.7
Tanning, dressing of leather; luggage (19)	30.1
Wood, except furniture; articles of straw and plaiting materials (20)	34.8
Pulp, paper and paper products (21)	5.3
Publishing, printing, reproduction of recorded media (22)	23.0
Coke, refined petroleum products and nuclear fuel (23)	1.1
Chemicals and chemical products (24)	3.1
Rubber and plastic products (25)	12.0
Other non-metallic mineral products (26)	13.8
Basic metals (27)	3.7
Fabricated metal products, except machinery and equipment (28)	30.4
Machinery and equipment n.e.c. (29)	12.4
Office machinery and computers (30)	6.2
Electrical machinery and apparatus n.e.c. (31)	8.6
Radio, television and communication equipment and apparatus (32)	4.2
Medical, precision and optical instruments, watches and clocks (33)	18.4
Motor vehicles, trailers and semi-trailers (34)	1.9
Other transport equipment (35)	4.2
Furniture; manufacturing n.e.c. (36)	29.3
Recycling (37)	39.1

(1) Extraction of data made in March 2003; the data presented in this table shows the importance of enterprises with less than 20 persons employed, enterprises that are generally not covered within SBS LONG, the principal data set used when drafting chapters for manufacturing activities.
Source: Eurostat, Structural Business Statistics (theme4/sbs/sizclass).

Table 9

Breakdown of activity by enterprise size class in the EU, 1999 (1)

NACE label (NACE code)	Value added: Micro (1-9 persons employed)	Value added: Small (10-49 persons employed)	Value added: Medium (50-249 persons employed)	Value added: Large (250 or more persons employed)	Employment: Micro (1-9 persons employed)	Employment: Small (10-49 persons employed)	Employment: Medium (50-249 persons employed)	Employment: Large (250 or more persons employed)
Manufacturing (D)	7.7	16.3	22.2	53.7	13.4	21.7	23.3	41.5
Construction (F)	32.5	32.5	17.2	17.9	41.2	31.4	14.3	13.0
Distributive trades (G)	29.2	23.9	16.6	30.3	38.9	21.4	11.7	27.9
Hotels & restaurants (H)	39.7	24.6	11.9	23.8	45.6	24.5	9.9	20.0
Transport, storage & communication (I)	10.8	11.8	9.8	67.6	15.9	14.8	12.5	56.8
Real estate, renting & business activities (K)	33.9	23.9	22.3	19.9	32.2	19.0	16.5	32.2

(1) NACE Sections C, E and J, not available.
Source: Eurostat, Structural Business Statistics (theme4/sbs/sizclass).

THE EU'S MANUFACTURING SECTOR FROM 1990 TO 2001

After a reduction in manufacturing activity at the start of the 1990s, the EU's value added in constant price terms increased during six consecutive years from 1996 to 2001 – see Figure 9. By 2001, the value added generated by the EU's manufacturing sector had reached EUR 1 327 billion.

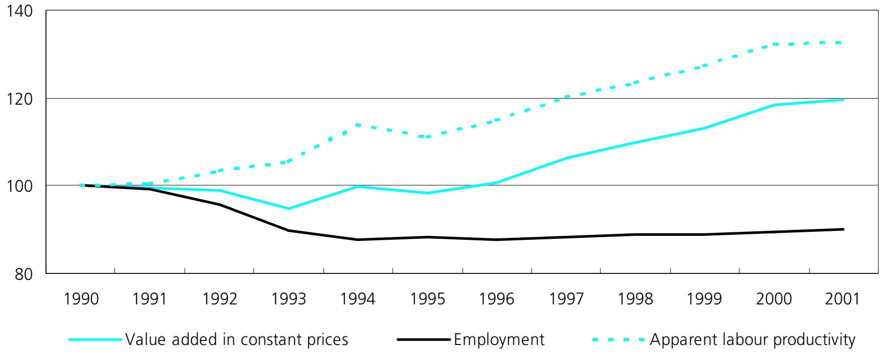
There were a total of 23.7 million persons employed in the EU's manufacturing sector in 2001, down from 26.3 million in 1990. The decline in manufacturing employment was almost exclusively confined to the first half of the 1990s, since when employment levelled off. There was an absolute gain of 3.0 % in the number of persons employed between the low reached in 1996 and the latest data for 2001.

The decline in employment levels during the first half of the 1990s was the main contributing factor to overall productivity gains in the EU's manufacturing economy between 1990 and 1995. Nevertheless, since 1996 apparent labour productivity gains have been stimulated mainly by a sharp increase in real value added rather than a fall in employment. It is also important to remember that while the level of employment in manufacturing has itself fallen between 1990 and 2001, a large proportion of employment in the tertiary sector is dependent on the manufacturing sector as the source of demand for their services.

As the role of intangibles becomes more important, most commentators agree that the fastest growing areas of the EU's economy are those driven by marketing, innovation and technology. SBS data for the EU between 1990 and 2001 reports that the fastest growth among manufacturing activities was recorded in the chemicals, chemical products and man-made fibres sector (NACE Subsection DG), rubber and plastic products' sector (NACE Subsection DH) and the transport equipment sector (NACE Subsection DM). All of these can be considered as either research-driven with a high degree of technological innovation (for example, aerospace, pharmaceuticals or plastics manufacture), or alternatively marketing-driven, with brand image playing an important role in differentiating products (for example, motor vehicles or detergents) – see Table 10.

Figure 9

Evolution of main indicators for manufacturing (NACE Section D) in the EU (1990=100)



Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/ent_l_ms).

Table 10

Share of manufacturing value added in the EU (%)

NACE label (NACE code)	1990	2001
Food products; beverages and tobacco (DA) (1)	11.0	11.3
Textiles and textile products (DB)	5.3	3.7
Leather and leather products (DC)	1.0	0.8
Wood and wood products (DD)	1.6	1.6
Pulp, paper and paper products; publishing and printing (DE)	8.3	8.8
Coke, refined petroleum products and nuclear fuel (DF)	1.8	2.1
Chemicals, chemical products and man-made fibres (DG)	10.7	11.8
Rubber and plastic products (DH)	4.2	4.8
Other non-metallic mineral products (DI)	4.8	4.4
Basic metals and fabricated metal products (DJ)	12.4	11.7
Machinery and equipment n.e.c. (DK)	11.4	10.6
Electrical and optical equipment (DL) (2)	13.6	13.3
Transport equipment (DM)	11.9	12.5
Manufacturing n.e.c. (DN) (1)	2.0	2.7

(1) 2001, estimate.
(2) 1990, estimate.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/ent_l_ms).

Table 11

Relative specialisation in the manufacturing sector, 2000 (1)

B	DK	D	EL	E
Accumulators, cells & batteries	Fish	Electricity distribn. & control app.	Cement, lime & plaster	Cement, lime & plaster
Other first processing of iron & steel	Games & toys	Machine tools	Oils & fats	Ceramic tiles & flags
Other textiles	Optical & photographic equipment	Motor vehicles	Textile fibres	Stone
F	**IRL**	**I**	**L**	**NL**
Aircraft & spacecraft	Basic chemicals	Ceramic tiles & flags	Basic iron & steel (ECSC)	Audio-visual household goods
Processing of nuclear fuel	Office machinery & computers	Motorcycles & bicycles	Other textiles	Oils & fats
Steam generators	Reproduction of recorded media	Tanning & dressing of leather	Rubber products	Other transport equipment n.e.c.
A	**P**	**FIN**	**S**	**UK**
Railway rolling stock	Footwear	Pulp, paper & paperboard	Pulp, paper & paperboard	Aircraft & spacecraft
Sawmilling & planing of wood	Knitted & crocheted fabrics	Sawmilling & planing of wood	Sawmilling & planing of wood	Pesticides & other agro-chemical products
Sports goods	Other wood products	Telecommunications equipment	Tubes	Publishing

(1) Three most specialised manufacturing activities per country; based on NACE Groups and their specialisation ratios in terms of value added at factor cost; excluding recycling; only NACE Groups with a share >0.5% of national manufacturing are included; activities are ranked in alphabetical order; estimates.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/ent_l_ms).

Table 11 provides information on specialisation ratios, which compare for a given country the importance of a particular NACE group in total manufacturing value added to the same ratio for the EU as a whole. The results show that natural endowments of resources, reinforced by long-standing traditions, can be an important contributing factor to the composition of a country's manufacturing sector, as high ratios were recorded for sawmilling and planing of wood in Finland and Sweden, stone in Spain, other wood products (namely, cork) in Portugal and ceramic tiles and flags in Italy. High-technology sectors featured in several countries: for example, aircraft and spacecraft in France and the United Kingdom, office machinery and computers in Ireland and audiovisual household goods in the Netherlands. It is important to note that smaller countries tend to register a broader range (both much higher and much lower) of relative specialisation ratios than larger countries, as some manufacturing sectors do not exist in smaller countries, thus magnifying the relative importance of those that do. It is also important to consider that specialisation ratios, per se, provide no information as to whether or not an industry accounts for an important share of total manufacturing. For this reason, very small activities that accounted for less than 0.5 % of a country's manufacturing value added in 2000 were removed from the table, even when one country dominated the EU total in a very small industry.

One factor that plays an important role in determining the competitiveness of industrial sectors is price. The European business trends (EBT) database provides information for annual domestic output price indices. Table 12 shows that output prices in manufacturing as a whole rose by 7.6 % between 1995 and 2001. Prices at the NACE subsection level rose for all but one activity, as the price of electrical and optical equipment in the EU was 5.3 % lower in 2001 than it had been in 1995. The vast majority of price increases registered in the EU's manufacturing sector were less than 10 % overall between 1995 and 2001, while the harmonised index of consumer prices rose by 11.5 % during the same period. Indeed, there were just two exceptions to this rule, the leather and leather products' sector (where prices rose by 12.2 %) and the coke, refined petroleum products and nuclear fuel sector (where prices rose by as much as 57.6 %). Prices in the refined petroleum products and nuclear fuel sector are to a very large degree dependent upon the cost of crude oil.

EXTERNAL TRADE STATISTICS

THE EU'S EXTERNAL TRADE SITUATION FROM 1991 TO 2001

External trade statistics for manufactured goods are available within the Comext database, and can be compiled according to the classification of products by activity (CPA). The EU totals cited in this section refer to extra-EU trade only and do not include intra-EU flows (in other words, trade between the Member States). On the other hand, the data presented for the Member States takes account of all external trade flows, both with intra and extra-EU partners.

As the EU data only refer to extra-EU trade, it is important to bear in mind that certain products have characteristics that mean they are less likely to be traded over long distances (for example, goods with low unit values relative to their transportation cost, perishable goods or fragile goods). Extra-EU exports of manufactured products (CPA Section D) expanded by 153.5 % between 1991 and 2001, equivalent to an average rate of 9.7 % per annum. These growth rates reflect the growing importance of globalisation and world markets.

Table 12

Development of domestic output prices in the EU (1995=100)

NACE label (NACE code)	1995	1996	1997	1998	1999	2000	2001
Manufacturing (D)	100.0	101.1	101.8	100.9	101.2	106.6	107.6
Food products; beverages and tobacco (DA)	100.0	102.1	103.4	103.1	102.3	103.9	107.5
Textiles and textile products (DB)	100.0	100.9	101.8	102.6	102.3	103.5	105.1
Leather and leather products (DC)	100.0	102.1	103.7	105.1	105.4	107.6	112.2
Wood and wood products (DD)	100.0	98.9	100.0	100.7	100.2	101.1	101.7
Pulp, paper and paper products; publishing and printing (DE)	100.0	99.3	98.4	99.3	99.0	104.1	106.1
Coke, refined petroleum products and nuclear fuel (DF)	100.0	111.7	116.9	103.4	117.3	168.2	157.0
Chemicals, chemical products and man-made fibres (DG)	100.0	98.8	99.6	98.0	97.2	103.2	104.3
Rubber and plastic products (DH)	100.0	100.0	99.4	98.8	97.9	100.0	101.2
Other non-metallic mineral products (DI)	100.0	100.8	101.7	102.7	103.8	105.8	108.3
Basic metals and fabricated metal products (DJ)	100.0	97.5	98.0	98.5	96.3	100.7	101.0
Machinery and equipment n.e.c. (DK)	100.0	102.6	104.1	105.1	106.0	107.1	108.6
Electrical and optical equipment (DL)	100.0	99.4	98.3	96.7	95.2	95.2	94.7
Transport equipment (DM)	100.0	101.9	102.1	103.1	103.6	103.9	104.6
Manufacturing n.e.c. (DN)	100.0	102.7	103.7	104.9	106.1	107.6	109.9

Source: Eurostat, European Business Trends (theme4/ebt/ebt_ind/ind_pric).

The EU's manufacturing trade surplus in 2001 was EUR 95.7 billion, which was a EUR 42.1 billion increase on 2000. This rapid gain of 79 % was entirely the result of expanding exports, while imports remained at almost the same level as in 2000 (down by EUR 1.9 billion). As a result, the EU recorded its highest trade surplus in manufactured products since 1997.

Table 13 details the external trade position of each Member State for manufactured products in 2001. In absolute terms the highest trade surplus was recorded in Germany (EUR 132 billion). However, in relative terms the German cover ratio was 130.2 % (indicating that total exports of manufactured goods were some 30.2 % higher than the corresponding total for imports). This was not the highest ratio among the Member States, as it was surpassed marginally by the cover ratio for Sweden (130.4 %), and more significantly by the cover ratios for Finland (157.7 %) and Ireland (167.2 %).

On the other hand, there were six Member States that reported trade deficits for manufactured goods in 2001. The largest of these was in the United Kingdom (EUR 62 billion), where total exports of manufactured goods accounted for 81.1 % of imports; the cover ratios of Portugal (69.2 %) and Greece (37.1 %) were considerably lower still.

Table 13

External trade flows of manufactured goods (CPA Section D), 2001 (million EUR)

	Exports	Share in EU total (%)	Imports	Share in EU total (%)	Trade balance	Cover ratio (%)
EU-15 (1)	910 433	-	814 760	-	95 673	111.7
B	190 815	8.2	167 602	7.8	23 213	113.9
DK	49 601	2.1	45 595	2.1	4 006	108.8
D	568 221	24.4	436 281	20.3	131 940	130.2
EL	9 627	0.4	25 927	1.2	-16 299	37.1
E	118 059	5.1	144 778	6.7	-26 719	81.5
F	339 904	14.6	328 180	15.3	11 724	103.6
IRL	84 755	3.6	50 691	2.4	34 064	167.2
I	260 418	11.2	217 886	10.2	42 532	119.5
L	11 086	0.5	12 362	0.6	-1 276	89.7
NL	205 413	8.8	182 363	8.5	23 049	112.6
A	73 416	3.1	76 261	3.6	-2 845	96.3
P	26 431	1.1	38 205	1.8	-11 775	69.2
FIN	47 248	2.0	29 953	1.4	17 295	157.7
S	78 467	3.4	60 172	2.8	18 295	130.4
UK	267 428	11.5	329 573	15.4	-62 145	81.1

(1) Trade with non-Community countries only.
Source: Eurostat, Comext.

Looking at the EU's external trade performance, broken down by CPA subsection, Table 14 shows that in 2001 some 68.5 % of the EU's manufactured exports were concentrated within the four product groups of chemicals, machinery and equipment, electrical and optical equipment, and transport equipment. This share was 7 percentage points higher than in 1991. A similar pattern was observed for imports, with the share of the four most important subsections rising from 56.5 % in 1991 to 61.6 % by 2001.

The increase in manufactured imports and exports over the period 1991 to 2001 was concentrated within two CPA subsections. Electrical and optical equipment (CPA Subsection DL) and transport equipment (CPA Subsection DM) recorded 5.1 and 2.1 percentage point gains in their respective shares of total manufactured imports and 6.2 and 2.4 point gains in their shares of total exports. Hence, these products consolidated their position as the most important CPA subsections for imports (together they accounted for 43.0 % of the EU's total manufacturing imports in 2001 compared to 36.3 % in 1991). Furthermore, they supplanted machinery and equipment (CPA Subsection DK) as the EU's most exported manufactured goods (together accounting for 38.8 % of exports in 2001, compared to 30.3 % in 1991).

The EU's largest trade surpluses were recorded for chemicals, machinery and equipment, and transport equipment in 2001. Although not as important in size, the EU also enjoyed a positive external trade position for pulp, paper and paper products, publishing and printing and other non-metallic mineral products. On the other hand, the largest trade deficits were recorded for electrical and optical equipment and textiles, while the EU also relied heavily on imports of wood and wood products, and coke, refined petroleum products and nuclear fuel.

Table 14

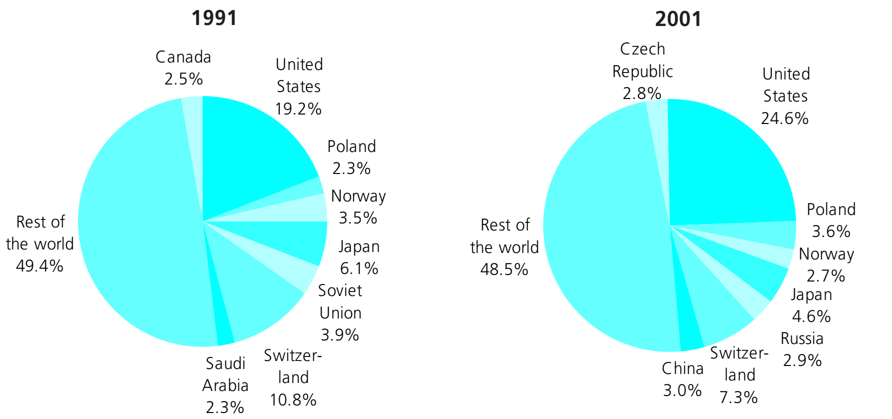
EU-15 external trade flows with non-Community countries (% share of manufacturing total)

CPA label (CPA code)	Exports 1991	Exports 2001	Imports 1991	Imports 2001
Food products; beverages and tobacco (DA)	7.6	5.3	7.2	5.0
Textiles and textile products (DB)	5.7	4.7	10.7	8.8
Leather and leather products (DC)	1.7	1.6	2.3	2.2
Wood and wood products (DD)	0.6	0.8	1.9	1.4
Pulp, paper and paper products; publishing and printing (DE)	3.2	2.8	2.6	2.1
Coke, refined petroleum products and nuclear fuel (DF)	2.0	1.9	4.4	2.8
Chemicals, chemical products and man-made fibres (DG)	13.1	14.7	9.5	9.8
Rubber and plastic products (DH)	2.3	2.5	1.9	2.2
Other non-metallic mineral products (DI)	2.3	1.9	1.0	1.2
Basic metals and fabricated metal products (DJ)	9.2	7.0	9.5	8.8
Machinery and equipment n.e.c. (DK)	18.1	14.9	8.2	8.3
Electrical and optical equipment (DL)	14.3	20.4	23.5	28.6
Transport equipment (DM)	16.0	18.4	12.8	14.4
Manufacturing n.e.c. (DN)	4.0	3.3	4.3	4.4

Source: Eurostat, Comext.

Figure 10

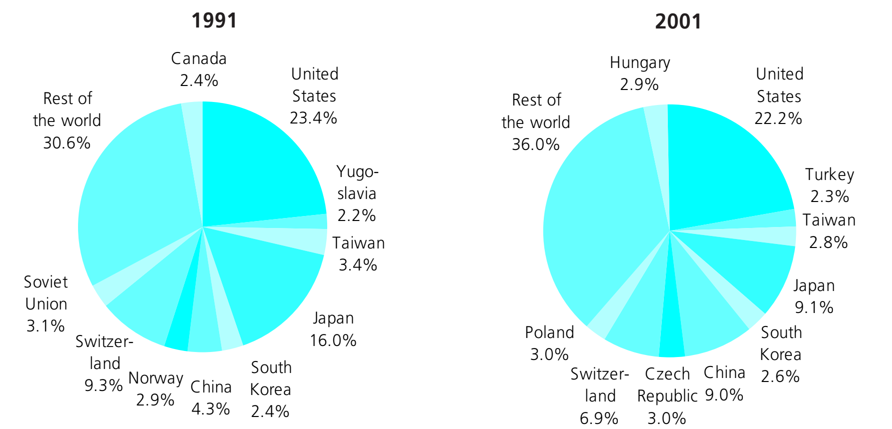
Destination of EU manufacturing (CPA Section D) exports



Source: Eurostat, Comext.

Figure 11

Origin of EU manufacturing (CPA Section D) imports



Source: Eurostat, Comext.

The share of the top 10 export markets for EU manufactured goods remained relatively stable between 1991 and 2001, rising from 54.7 to 56.0 %. The largest market was the United States, which accounted for almost one quarter (24.6 %) of the EU's exported manufactured products in 2001; this equated to a 5.4 percentage point increase when compared to 1991 – see Figure 10. On the other hand, the second and third most important export markets both saw their relative importance decline during the 1990s. The share of exports to Switzerland fell by 3.5 percentage points to 7.3 %, while there was a 1.5 point reduction in the share of total exports that were destined for Japan, reaching 4.6 % by 2001. Exports were, in part, redirected towards the candidate countries (as witnessed by the appearance of the Czech Republic in the top eight and the 1.3 point increase in the share of exports to Poland, which was already in the top eight), as well as towards China (which also entered the top eight export markets in 2001).

The United States was also the most important supplier of manufactured products into the EU – see Figure 11. It accounted for 22.2 % of EU manufactured imports in 2001, which was 1.2 percentage points below its corresponding share in 1991. There were more significant reductions in the shares of Japan, Switzerland and Taiwan; however, all three of these countries remained in the top 10 importers into the EU. The main beneficiary was China, whose share of EU imports of manufactured products rose from 4.3 % in 1991 to 9.0 % by 2001. There were also significant gains made by several of the candidate countries, most notably Poland, the Czech Republic and Hungary, who occupied fifth, sixth and seventh places in the ranking in 2001.

Table 15

EU-15 international trade in services with non-Community countries, 2001 (million EUR)

	Credit	Debit	Net balance
Services	313 806	304 763	9 043
Transportation	78 082	74 059	4 023
Travel	71 866	77 445	-5 579
Communication services	6 201	6 934	-732
Construction services	10 046	6 390	3 656
Insurance services	7 892	3 285	4 606
Financial services	21 248	11 502	9 746
Computer and information services	11 880	7 457	4 423
Other business services	82 503	82 669	-167
Personal, cultural and recreational services	3 282	6 634	-3 352
Government services n.e.c.	7 108	5 974	1 133

Source: Eurostat, International trade in services (theme2/bop/its).

Services have increasingly become the subject of free trade negotiations and this has stimulated trade in services. However, according to balance of payments statistics, goods exported from the EU to non-Community countries were valued at more than three times the value of similar service transactions in 2001. EU credits for service transactions reached EUR 313.8 billion, equivalent to a 5.0 % increase on 2000. Debits grew by 4.3 % to reach EUR 305 billion, such that the EU recorded a net surplus of EUR 9.0 billion on its service transactions in 2001 – see Table 15. Three service sectors collectively accounted for almost three quarters (74.1 %) of the EU's external transactions of services in 2001: transportation, travel and other business services.

The United Kingdom had the highest share of credits from international trade in services in the EU, accounting for 17.5 % of the total in 2001 (see Table 16). This was well ahead of Germany, where EUR 98 billion of credits were recorded in 2001 (13.8 % of the total). Looking at the debits, as well as the credits, the United Kingdom registered the largest deficit for manufactured products but the highest net surplus for service transactions, while Germany recorded the largest surplus for manufactured products and the highest deficit for service transactions.

Table 16

International trade in services, 2001 (million EUR)

	Credit	Debit
EU-15 (1)	313 806	304 763
B/L	56 195	48 414
DK	30 066	26 294
D	97 804	154 744
EL	21 733	12 935
E	64 763	37 625
F	89 581	69 655
IRL	22 577	38 934
I	64 279	63 917
NL	59 131	61 340
A	36 704	35 259
P	9 835	6 917
FIN	6 512	9 049
S	24 571	25 628
UK	123 509	105 703

(1) Trade with non-Community countries only.
Source: Eurostat, International trade in services (theme2/bop/its).

CANDIDATE COUNTRIES

As with the data for the EU, this description of the business economies of the candidate countries begins with data relating to living standards. The candidate countries all possessed lower GDP per inhabitant than the EU average in 2001. However, Cyprus and Slovenia reported levels of GDP per inhabitant that were higher than some of the EU Member States – see Figure 12.

Table 17 provides information on the structure of the candidate country economies. Some still reflect the process of transition towards market economies. For example, the importance of agriculture, hunting, forestry and fishing was often considerably higher in the candidate countries than in the EU. Distributive trades, hotels and restaurants, transport, storage and communication also generally accounted for a higher share of activity in the candidate countries.

LFS data provides a measure of working characteristics in 11 of the candidate countries (no data were available for Malta or Turkey at the time of writing). There were 96 million persons living in the 11 countries for which data are available for 2001, with the vast majority of the population (some 85.2 million) aged 15 years or more. About half of those who had reached a working age were in employment, some 42.7 million persons, with 6.4 million persons unemployed and the remaining 36.1 million non-active – see Figure 13. Although part-time employment accounted for almost one in five persons in employment in the EU (18 %), there were only three candidate countries where the share of part-time employment in total employment rose into double digits; namely, Latvia (10.0 %), Poland (10.2 %) and Romania (16.8 %). Part-time employment accounted for 5 % or less of the workforce in Bulgaria, the Czech Republic, Hungary and the Slovakia.

Some 42.8 % of those employed in the EU in 2001 were women. In the majority of candidate countries the share of women in total employment was higher, surpassing 50 % in Latvia and Lithuania, and only below the EU average in Cyprus (41.5 %) – see Figure 14.

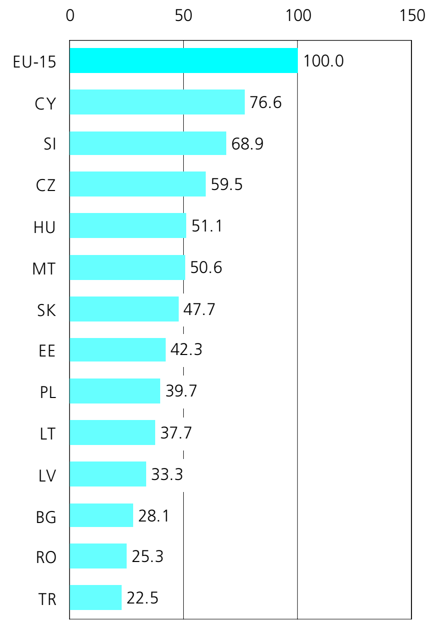
As regards the breakdown of employment, agriculture, hunting, forestry and fishing accounted for a higher share of those employed when compared to the EU average of 4.2 % in every candidate country – see Figure 15. In four of the candidates, the share of this sector in total employment rose into double digits, climbing as high as 44.4 % in Romania [7]. The industrial (and construction) economies of the candidate countries also tended to account for a somewhat higher share of total employment than the EU average of 28.7 %. However, this was not the case in Cyprus, Lithuania, Romania or Latvia, while at the other extreme more than 40 % of the workforce in the Czech Republic worked in the industrial economy. The service sector accounted for more than half of those employed in all but one of the candidate countries – Romania, where the share of services in total employment was 29.7 %. The vast majority of the candidates did not, however, report employment rates in the service sector as high as the EU average of 67.1 %. Indeed, the only one above the EU average was Cyprus, where 71.1 % of those employed worked in the service sector.

More detailed activity data are available for the majority of candidate countries from SBS for 2000. These data are generally available for most NACE sections within the business economy (Sections C to K).

[7] A high proportion of persons working in the candidate countries may have more than one occupation and it may therefore be difficult to distinguish their main occupation.

Figure 12

GDP per inhabitant in the candidate countries, 2001 (EU-15=100) (1)



(1) At current market prices and PPS; MT, 1999.
Source: Eurostat, National Accounts - ESA95 - aggregates (theme2/aggs).

Table 17

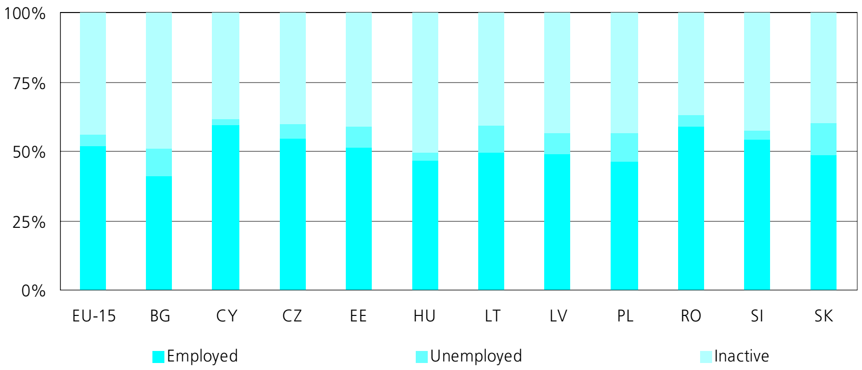
Breakdown of GDP in the candidate countries, 2001 (%)

NACE label (NACE code)	EU-15	BG (1)	CY (2)	CZ	EE	HU	LT	LV	MT	PL	RO (1)	SI	SK	TR
Agriculture, hunting, forestry & fishing (A & B)	2.1	13.8	4.0	4.2	5.8	4.3	7.1	4.7	2.4	3.4	14.6	3.1	4.6	12.1
Mining & quarrying; manufacturing; electricity, gas & water supply (C to E)	22.1	23.0	12.9	32.9	22.8	27.1	27.8	18.7	24.5	25.4	28.5	31.0	27.5	23.8
Construction (F)	5.4	3.5	7.1	7.2	5.9	4.9	6.1	6.2	2.8	7.5	5.5	5.9	5.2	4.8
Distributive trades; hotels & restaurants; transport, storage & comm. (G to I)	21.6	:	32.5	25.2	32.1	22.0	29.5	35.4	22.1	30.0	51.3	22.4	29.1	34.4
Financial intermediation; real estate, renting & business activities (J & K) (3)	27.2	:	20.9	15.7	15.6	21.7	10.6	16.0	19.5	16.1	9.4	16.5	18.3	11.3
Public administration, community, social & personal services (L to Q) (3)	21.7	:	22.5	15.0	17.9	20.0	19.0	19.0	28.8	17.6	16.9	21.2	15.4	13.6

(1) 2000.
(2) Provisional.
(3) RO, 2000.
Source: Eurostat, National Accounts - Breakdowns by branch of activity (theme2/brkdowns).

Figure 13

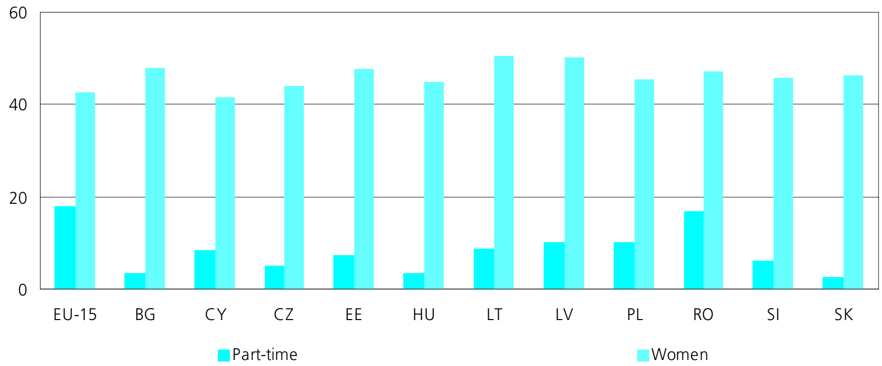
Breakdown of the labour force by employment status in the candidate countries, 2001 (share of persons aged 15 or more) (1)



(1) NACE Sections A to Q.
Source: Eurostat, Labour Force Survey.

Figure 14

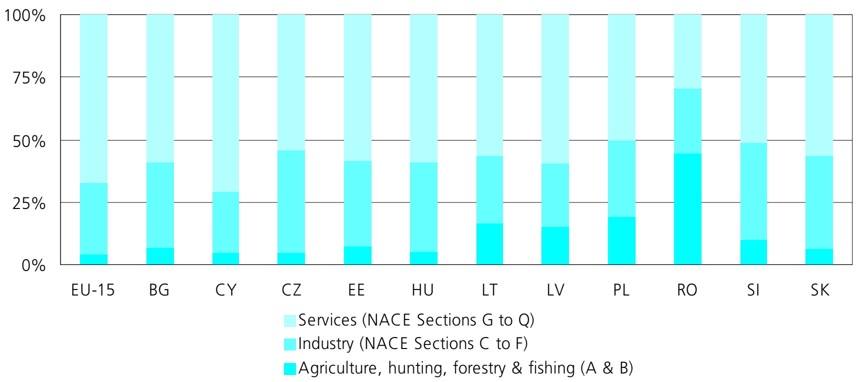
Labour force characteristics in the candidate countries, 2001 (% share of those employed aged 15 or more) (1)



(1) NACE Sections A to Q.
Source: Eurostat, Labour Force Survey.

Figure 15

Breakdown of persons in employment by activity in the candidate countries, 2001 (share of those employed aged 15 or more)



Source: Eurostat, Labour Force Survey.

Poland had by far the largest business economy in the candidate countries with EUR 92.6 billion of value added in 2000; a level that was in excess of that recorded in Denmark, Greece, Ireland, Luxembourg, Portugal and Finland. The next largest economy was the Czech Republic, with EUR 31.1 billion of value added in 2000, with Hungary and Romania the only other candidate countries to report that their respective business economies generated more than EUR 10 billion of value added.

At the NACE section level, manufacturing was the largest activity in the candidate countries, accounting for 39.1 % of value added, compared to 31.2 % of the total in the EU (see Table 18). The next largest was distributive trades (17.7 %), while transport and communications (12.7 %) and business services (10.3 %) were the only other sectors to account for a double-digit share of the business economy total. Unlike the EU, where mining and quarrying (Section C) was often the smallest activity, in the candidate countries the smallest activity was frequently hotels and restaurants (Section H), which accounted on average for just 1.8 % of business activity in the candidate countries. Taking an aggregate of all candidate countries is somewhat misleading, as there were naturally country differences away from the patterns reported above. For example, the hotels and restaurants sector accounted for as little as 0.9 % of total value added in Slovakia, to as much as 20.2 % of the total in Cyprus. In the same way, the share of the manufacturing sector varied considerably, from less than 30 % of the total in Cyprus, Estonia and Latvia to more than 40 % in the Czech Republic, Hungary, Slovenia and Slovakia and more than 50 % in Romania (55.3 %).

Table 18

Three largest activities in the candidate countries, 2000 (1)

	Largest	Second largest	Third largest
BG	Electricity, gas, steam & hot water	Post and telecommunications	Wholesale trade
CY (2)	Hotels and restaurants	Construction	Wholesale trade
CZ (3)	Wholesale trade	Construction	Other business activities
EE	Wholesale trade	Supporting and auxiliary transport activities; travel agencies	Post and telecommunications
HU (4)	Post and telecommunications	Electricity, gas, steam & hot water	Manufacture of food products and beverages
LT	Wholesale trade	Electricity, gas, steam & hot water	Post and telecommunications
LV	Wholesale trade	Construction	Supporting and auxiliary transport activities; travel agencies
MT	:	:	:
PL (5)	Wholesale trade	Construction	Other business activities
RO (6)	Construction	Land transport; transport via pipelines	Post and telecommunications
SI (7)	Construction	Wholesale trade	Other business activities
SK (8)	Wholesale trade	Electricity, gas, steam & hot water	Post and telecommunications
TR	:	:	:

(1) Ranking based on value added for NACE Divisions 15 to 74.
(2) 1998; NACE Divisions 60 to 74, not available.
(3) NACE Divisions 15 and 16, not available.
(4) NACE Divisions 50 to 52, 1998.
(5) NACE Division 26, 1999; NACE Divisions 15, 40, 41, 61 and 63, 1998.
(6) NACE Divisions 52 and 62, 1998; NACE Division 51, 1997.
(7) 1999.
(8) NACE Divisions 15, 19 and 62, 1999; NACE Divisions 23 and 61, 1998.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_cc).

Table 19

Breakdown of value added by enterprise size class in manufacturing sector of the candidate countries, 2000 (%)

	1-9 persons employed	10-19 persons employed	20-49 persons employed	50-99 persons employed	100-249 persons employed	250+ persons employed
EU-15	7.2	6.2	9.4	8.3	13.1	55.8
CZ	5.9	3.7	7.5	8.2	15.0	59.6
EE	4.1	6.1	13.5	15.6	24.0	36.6
HU (1)	:	3.8	5.7	6.8	12.6	:
LT	4.1	3.9	9.5	9.4	16.4	56.7
LV	4.6	4.8	12.7	11.4	21.5	44.9
PL	11.0	2.4	6.7	7.3	14.1	58.5
RO	1.7	2.7	4.8	5.3	12.2	73.3
SI	10.1	4.0	6.2	7.7	17.6	54.4
SK	3.9	3.5	5.1	5.5	11.7	70.3

(1) Only enterprises with 5 or more persons employed are considered.
Source: Eurostat, Structural Business Statistics (theme4/sbs/sizclass/indus_cc and theme4/sbs/sizclass/indus_ms).

Among, non-manufacturing, industrial activities there was particular importance for the electricity, gas, steam and hot water supply subsector (NACE Division 40) and the construction sector (NACE Division 45). Turning to service activities, a completely different picture was apparent in the candidate countries. While the largest three service activities in almost every EU Member State were wholesale trade, retail trade and other business activities (NACE Divisions 51, 52 and 74), post and telecommunications (NACE Division 64) had considerably more importance in the candidate countries. This position may have been influenced by the rapid take-up of communication technologies in some of the candidate countries, with investment in telecommunications infrastructure fuelling growth. Another service activity that was relatively more important in several of the candidate countries was supporting and auxiliary transport activities and travel agencies (NACE Division 63) – see Table 18.

In terms of the distribution of enterprises across size classes there was also great diversity according to the candidate country being studied (see Table 19). Large enterprises with 250 or more persons employed accounted for a very high share of manufacturing activity in Romania and Slovakia (more than 70 % of total value added), while the corresponding share in Estonia was 36.6 %. This latter value was well below the EU average of 55.8 %, around which most of the remaining candidate countries were grouped – see Table 19.

Statistical annex

There follows a short set of tables giving some general information which may be of use in interpreting the data that follows in the remaining chapters. This data is of a horizontal nature and may prove relevant for a number of chapters.

Table SA.1

Exchange rates, annual average rates (1 ECU/EUR=… national currency)

	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002 (1)
BEF/LUF	42.2233	41.5932	40.4713	39.6565	38.5519	39.2986	40.5332	40.6207	40.3399	40.3399	40.3399	-
DKK	7.90859	7.80925	7.59359	7.54328	7.32804	7.35934	7.48361	7.49930	7.43556	7.45382	7.45207	7.43052
DEM	2.05076	2.02031	1.93639	1.92453	1.87375	1.90954	1.96438	1.96913	1.95583	1.95583	1.95583	-
GRD	225.216	247.026	268.568	288.026	302.989	305.546	309.355	330.731	325.820	336.678	340.750	-
ESP	128.469	132.526	149.124	158.918	163.000	160.748	165.887	167.184	166.386	166.386	166.386	-
FRF	6.97332	6.84839	6.63368	6.58262	6.52506	6.49300	6.61260	6.60141	6.55957	6.55957	6.55957	-
IEP	0.767809	0.760718	0.799952	0.793618	0.815525	0.793448	0.747516	0.786245	0.787564	0.787564	0.787564	-
ITL	1 533.24	1 595.52	1 841.23	1 915.06	2 130.14	1 958.96	1 929.30	1 943.65	1 936.27	1 936.27	1 936.27	-
NLG	2.31098	2.27482	2.17521	2.15827	2.09891	2.13973	2.21081	2.21967	2.20371	2.20371	2.20371	-
ATS	14.4309	14.2169	13.6238	13.5396	13.1824	13.4345	13.8240	13.8545	13.7603	13.7603	13.7603	-
PTE	178.614	174.714	188.370	196.896	196.105	195.761	198.589	201.695	200.482	200.482	200.482	-
FIM	5.00211	5.80703	6.69628	6.19077	5.70855	5.82817	5.88064	5.98251	5.94573	5.94573	5.94573	-
SEK	7.47927	7.53295	9.12151	9.16308	9.33192	8.51472	8.65117	8.91593	8.80752	8.44519	9.25511	9.16107
GBP	0.701012	0.737650	0.779988	0.775903	0.828789	0.813798	0.692304	0.676434	0.658735	0.609478	0.621874	0.628831
JPY	166.493	164.223	130.148	121.322	123.012	138.084	137.077	146.415	121.317	99.475	108.682	118.063
USD	1.23916	1.29810	1.17100	1.18952	1.30801	1.26975	1.13404	1.12109	1.06578	0.92194	0.89563	0.94557
BGN	0.03385	0.05105	0.03231	0.06439	0.08787	0.22515	1.90157	1.96913	1.95584	1.94792	1.94819	1.94921
CYP	0.573350	0.583675	0.582941	0.583931	0.591619	0.591904	0.582628	0.577418	0.578850	0.573924	0.575892	0.575301
CZK	:	:	34.1690	34.1509	34.6960	34.4572	35.9304	36.3196	36.8843	35.5995	34.0685	30.8036
EEK	:	:	15.4911	15.3962	14.9900	15.2763	15.7150	15.7530	15.6466	15.6466	15.6466	15.6466
HUF	142.202	172.777	107.611	125.030	164.545	193.741	211.654	240.573	252.767	260.045	256.591	242.958
LTL	:	2.14329	5.08682	4.73191	5.23203	5.07899	4.53616	4.48437	4.26405	3.69516	3.58229	3.45943
LVL	:	0.896066	0.793600	0.664101	0.689537	0.699605	0.659401	0.660240	0.625601	0.559227	0.560060	0.581048
MTL	0.399820	0.412953	0.447021	0.448852	0.461431	0.458156	0.437495	0.434983	0.425773	0.404138	0.403007	0.408936
PLN	2.01692	2.97484	2.12217	2.70153	3.17049	3.42232	3.71545	3.91784	4.22741	4.00817	3.67214	3.85742
ROL	145.4	673.7	885.8	1971.6	2661.8	3922.2	8111.5	9984.9	16345.2	19921.8	26004.0	31269.7
SIT	36.969	98.434	132.486	152.766	154.880	171.778	180.996	185.958	194.473	206.613	217.980	225.977
SKK	:	:	36.0317	38.1182	38.8649	38.9229	38.1061	39.5407	44.1229	42.6017	43.3001	42.6935
TRL	5153	8931	12879	35535	59912	103214	171848	293736	447237	574816	1102430	1439680

(1) National currencies marked as not applicable were replaced by the euro on 1 January 2002.
Source: Eurostat, Exchange rates (theme2/exint/exchrt/eurer/eurer_an).

Table SA.2

Population, as of 1 January (thousands)

	1991	1992	1993	1994	1995	1996	1997	1998	1999 (1)	2000 (2)	2001 (3)
EU-15	365 382	367 061	368 935	370 323	371 442	372 476	373 487	374 345	375 277	376 482	:
B	9 987	10 022	10 068	10 101	10 131	10 143	10 170	10 192	10 214	10 239	10 263
DK	5 146	5 162	5 181	5 197	5 216	5 251	5 275	5 295	5 314	5 330	5 349
D	79 753	80 275	80 975	81 338	81 539	81 817	82 012	82 057	82 037	82 163	82 260
EL	10 200	10 294	10 349	10 410	10 443	10 465	10 487	10 511	10 522	10 554	:
E	38 875	38 965	39 057	39 136	39 197	39 249	39 308	39 388	39 519	39 733	40 122
F	56 841	57 111	57 369	57 565	57 753	57 936	58 116	58 299	58 497	58 749	59 037
IRL	3 521	3 547	3 569	3 583	3 598	3 620	3 652	3 694	3 735	3 777	3 826
I	56 744	56 757	56 960	57 138	57 269	57 333	57 461	57 563	57 613	57 680	57 844
L	384	390	395	401	407	413	418	424	429	436	441
NL	15 010	15 129	15 239	15 342	15 424	15 494	15 567	15 654	15 760	15 864	15 987
A	7 769	7 868	7 962	8 015	8 040	8 055	8 068	8 075	8 083	8 103	8 121
P	9 877	9 961	9 965	9 983	10 013	10 041	10 070	10 108	10 150	10 198	10 263
FIN	4 998	5 029	5 055	5 078	5 099	5 117	5 132	5 147	5 160	5 171	5 181
S	8 591	8 644	8 692	8 745	8 816	8 837	8 844	8 848	8 854	8 861	8 883
UK	57 685	57 907	58 099	58 293	58 500	58 704	58 905	59 090	59 391	59 623	59 863
BG	8 669	8 595	8 485	8 460	8 427	8 385	8 341	8 283	8 230	8 191	8 149
CY	687	700	714	723	730	736	741	746	752	755	759
CZ	10 364	10 313	10 326	10 334	10 333	10 321	10 309	10 299	10 290	10 278	10 267
EE	1 570	1 562	1 527	1 507	1 492	1 476	1 462	1 454	1 446	1 372	1 367
HU	10 355	10 337	10 310	10 277	10 246	10 212	10 174	10 135	10 092	10 043	:
LT	3 736	3 747	3 736	3 724	3 718	3 712	3 707	3 704	3 701	3 699	3 693
LV	2 668	2 657	2 606	2 566	2 530	2 502	2 480	2 458	2 439	2 380	2 366
MT	356	360	363	366	369	371	374	377	379	380	391
PL	38 183	38 309	38 418	38 505	38 581	38 609	38 639	38 660	38 667	38 654	38 644
RO	23 192	22 811	22 779	22 748	22 712	22 656	22 582	22 526	22 489	22 455	22 430
SI	2 000	1 999	1 994	1 989	1 989	1 990	1 987	1 985	1 978	1 988	1 990
SK	5 272	5 296	5 314	5 336	5 356	5 368	5 379	5 388	5 393	5 399	5 403
TR	:	:	:	:	:	:	:	:	:	:	:

(1) E, IRL, L and BG, estimates.
(2) E, L and BG, estimates; IRL and EE, provisional.
(3) I, L, P and UK, estimates; IRL and EE, provisional.
Source: Eurostat, Demography - population (theme3/demo/dpop/pjan).

Table SA.3

Gross domestic product in constant prices, annual rate of change (%)

	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002 (1)
EU-15	1.3	-0.4	2.8	2.4	1.6	2.5	2.9	2.8	3.4	1.5	0.9
B	1.5	-1.0	3.2	2.4	1.2	3.6	2.0	3.2	3.7	0.8	0.7
DK	0.6	0.0	5.5	2.8	2.5	3.0	2.5	2.3	3.0	1.0	1.7
D	2.2	-1.1	2.3	1.7	0.8	1.4	2.0	2.0	2.9	0.6	0.4
EL	0.7	-1.6	2.0	2.1	2.4	3.6	3.4	3.6	4.2	4.1	3.5
E	0.9	-1.0	2.4	2.8	2.4	4.0	4.3	4.2	4.2	2.7	1.9
F	1.5	-0.9	2.1	1.7	1.1	1.9	3.4	3.2	3.8	1.8	1.0
IRL	3.3	2.7	5.8	9.9	8.1	10.9	8.8	11.1	10.0	5.7	3.3
I	0.8	-0.9	2.2	2.9	1.1	2.0	1.8	1.6	2.9	1.8	0.4
L	1.8	4.2	3.8	1.3	3.7	7.7	7.5	6.0	8.9	1.0	0.1
NL	1.7	0.9	2.6	3.0	3.0	3.8	4.3	4.0	3.3	1.3	0.2
A	2.3	0.4	2.6	1.6	2.0	1.6	3.9	2.7	3.5	0.7	0.7
P	1.1	-2.0	1.0	4.3	3.5	3.9	4.5	3.5	3.5	1.7	0.7
FIN	-3.3	-1.1	4.0	3.8	4.0	6.3	5.3	4.1	6.1	0.7	1.4
S	-1.7	-1.8	4.1	3.7	1.1	2.1	3.6	4.5	3.6	1.2	1.6
UK	0.2	2.5	4.7	2.9	2.6	3.4	2.9	2.4	3.1	2.0	1.6
BG	-7.3	-1.5	1.8	2.9	-9.4	-5.6	4.0	2.3	5.4	4.0	4.0
CY	:	0.7	5.9	6.2	1.9	2.5	5.0	4.8	5.2	4.1	1.8
CZ	-0.5	0.1	2.2	5.9	4.3	-0.8	-1.0	0.5	3.3	3.3	2.2
EE	:	:	-2.0	4.3	3.9	9.8	4.6	-0.6	7.1	5.0	4.5
HU	:	:	:	1.5	1.3	4.6	4.9	4.2	5.2	3.7	3.4
LT	-21.3	-16.2	-9.8	3.3	4.7	7.3	5.1	-3.9	3.8	5.9	5.0
LV	-34.9	-14.9	0.6	-1.6	3.7	8.4	4.8	2.8	6.8	7.7	5.0
MT	4.7	4.5	5.7	6.2	4.0	4.9	3.4	4.1	4.8	-0.4	2.8
PL	:	:	:	:	6.0	6.8	4.8	4.1	4.0	1.1	0.8
RO	-8.7	1.5	3.9	7.1	3.9	-6.1	-4.8	-1.2	1.8	5.3	4.2
SI	-5.5	2.8	5.3	4.1	3.5	4.6	3.8	5.2	4.6	3.0	2.6
SK	:	:	5.2	6.5	5.8	5.6	4.0	1.3	2.2	3.3	3.9
TR	6.0	8.0	-5.5	7.2	7.0	7.5	3.1	-4.7	7.4	-7.4	3.9

(1) Forecasts.
Source: Eurostat, National Accounts - ESA95 - aggregates (theme2/aggs).

Table SA.4

Gross domestic product in constant prices in the EU, annual rate of change (%)

NACE label (NACE code)	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001
Total (A to Q)	1.2	-0.3	2.5	2.4	1.7	2.5	3.0	2.7	3.7	1.8
Agriculture, hunting, forestry and fishing (A & B)	4.4	-0.6	-0.5	2.2	4.1	0.5	1.7	2.6	-0.9	-2.0
Mining & quarrying; manufacturing; electricity, gas & water supply (C to E)	-0.7	-3.5	4.3	3.1	0.0	3.0	3.0	1.1	3.8	0.6
Construction (F)	1.4	-4.1	2.2	0.0	-1.1	-1.3	0.8	2.4	2.3	-0.1
Distributive trades; hotels & restaurants; transport, storage & comm. (G to I)	1.4	0.1	2.7	2.2	1.6	3.4	4.0	4.6	4.9	2.8
Financial intermediation; real estate, renting & business activities (J & K)	1.5	1.9	1.9	3.5	3.7	3.7	4.1	3.7	4.6	3.0
Public administration, community, social & personal services (L to Q)	2.5	1.4	1.6	1.4	1.7	1.0	1.6	1.5	1.9	1.4

Source: Eurostat, National Accounts - Breakdowns by branch of activity (theme2/brkdowns).

Table SA.5

Long-term interest rate for government bond yields following the Maastricht Treaty, annual average rates (%)

	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001
EU-15 (1)	9.8	8.3	8.5	8.9	7.5	6.3	4.9	4.7	5.4	5.0
B	8.7	7.2	7.8	7.5	6.5	5.8	4.8	4.8	5.6	5.1
DK	8.9	7.3	7.8	8.3	7.2	6.3	4.9	4.9	5.6	5.1
D	7.9	6.5	6.9	6.9	6.2	5.6	4.6	4.5	5.3	4.8
EL	:	23.3	20.7	17.0	14.5	9.9	8.5	6.3	6.1	5.3
E	11.7	10.2	10.0	11.3	8.7	6.4	4.8	4.7	5.5	5.1
F	8.6	6.8	7.2	7.5	6.3	5.6	4.6	4.6	5.4	4.9
IRL	9.3	7.7	7.9	8.3	7.3	6.3	4.8	4.7	5.5	5.0
I	13.3	11.2	10.5	12.2	9.4	6.9	4.9	4.7	5.6	5.2
L	7.9	6.9	7.2	7.2	6.3	5.6	4.7	4.7	5.5	4.9
NL	8.1	6.4	6.9	6.9	6.2	5.6	4.6	4.6	5.4	5.0
A	8.3	6.7	7.0	7.1	6.3	5.7	4.7	4.7	5.6	5.1
P	11.7	11.2	10.5	11.5	8.6	6.4	4.9	4.8	5.6	5.2
FIN	12.0	8.8	9.1	8.8	7.1	6.0	4.8	4.7	5.5	5.0
S	10.0	8.5	9.7	10.2	8.0	6.6	5.0	5.0	5.4	5.1
UK	9.1	7.6	8.2	8.3	7.9	7.1	5.6	5.0	5.3	5.0

(1) 1992, excluding EL.
Source: Eurostat, Interest rates (theme2/exint/intrt/govyield/govyie_a).

Table SA.6

Harmonised consumer price indices, annual rate of change (%)

	1991 (1)	1992 (1)	1993 (1)	1994 (1)	1995 (1)	1996 (2)	1997 (2)	1998	1999	2000	2001
EU-15	5.2	4.0	3.4	2.8	2.8	2.4	1.7	1.3	1.2	2.1	2.3
B	:	2.3	2.5	2.4	1.3	1.8	1.5	0.9	1.1	2.7	2.4
DK	2.2	1.9	0.9	1.8	2.0	2.1	1.9	1.3	2.1	2.7	2.3
D	:	:	:	:	:	1.2	1.5	0.6	0.6	2.1	2.4
EL	:	:	:	:	:	7.9	5.4	4.5	2.1	2.9	3.7
E	:	:	4.9	4.6	4.6	3.6	1.9	1.8	2.2	3.5	2.8
F	3.4	2.4	2.2	1.7	1.8	2.1	1.3	0.7	0.6	1.8	1.8
IRL	:	:	:	:	:	2.2	1.2	2.1	2.5	5.3	4.0
I	6.2	5.0	4.5	4.2	5.4	4.0	1.9	2.0	1.7	2.6	2.3
L	:	:	:	:	:	1.2	1.4	1.0	1.0	3.8	2.4
NL	3.2	2.8	1.6	2.1	1.4	1.4	1.9	1.8	2.0	2.3	5.1
A	3.1	3.5	3.2	2.7	1.6	1.8	1.2	0.8	0.5	2.0	2.3
P	11.4	8.9	5.9	5.0	4.0	2.9	1.9	2.2	2.2	2.8	4.4
FIN	4.5	3.3	3.3	1.6	0.4	1.1	1.2	1.4	1.3	3.0	2.7
S	8.7	1.3	4.8	2.9	2.7	0.8	1.8	1.0	0.6	1.3	2.7
UK	7.5	4.2	2.5	2.0	2.7	2.5	1.8	1.6	1.3	0.8	1.2

(1) EU-15, B, DK, E, F, I, P, FIN, S and UK, estimates.
(2) EU-15 and IRL, estimates.
Source: Eurostat, Harmonized indices of consumer prices (theme2/price/hicp/haind).

Table SA.7

Share in total mean consumption expenditure by households, 1999 (%) (1)

COICOP	EU-15 (2)	B	DK	D	EL	E	F (2)	IRL	I	L	NL	A	P (2)	FIN	S	UK
Food and non-alcoholic beverages	16.1	13.3	13.1	11.1	16.6	18.3	16.2	15.4	19.0	10.1	10.5	13.4	21.2	14.2	15.4	10.5
Alcoholic beverages, tobacco and narcotics	2.8	2.3	4.2	2.8	3.5	2.7	2.7	7.7	1.9	2.0	2.1	2.6	2.8	2.9	2.9	3.0
Clothing and footwear	6.9	5.4	5.5	5.7	8.6	7.4	5.6	6.2	7.5	5.9	6.0	6.6	6.3	4.6	5.2	5.5
Housing, water, electricity, gas and other fuels	24.6	26.2	28.4	31.2	21.9	27.5	23.2	17.4	24.7	27.4	26.7	23.9	19.9	28.1	26.8	28.3
Furnishings, household equipment & maintenance	7.0	6.5	6.4	7.4	7.5	5.0	7.6	4.5	7.6	8.2	7.2	7.2	6.7	4.5	5.0	7.3
Health	3.1	4.7	2.4	3.6	6.3	2.5	5.2	1.6	4.4	2.4	1.1	2.4	4.6	3.7	3.0	1.1
Transport	13.1	12.5	14.1	13.3	11.2	12.5	14.5	13.0	13.7	15.4	10.3	14.4	15.7	17.0	13.4	13.6
Communication	2.0	2.2	2.1	2.5	3.3	2.0	2.0	2.5	2.5	2.1	2.2	2.6	2.0	2.8	2.6	2.3
Recreation and culture	9.4	10.7	11.2	11.9	4.5	6.2	7.6	9.1	6.3	8.7	10.4	12.3	3.7	10.7	14.6	13.4
Education	0.7	0.5	0.4	0.5	2.4	1.4	0.5	1.4	0.8	0.1	1.2	0.3	1.3	0.2	0.1	1.3
Restaurants and hotels	6.4	5.7	4.1	4.9	8.8	9.3	6.9	5.1	4.6	9.6	7.0	5.4	9.2	4.1	3.8	7.9
Miscellaneous goods and services	7.9	10.0	8.1	5.0	5.5	5.1	8.1	8.1	7.1	8.0	15.3	8.9	6.5	7.1	7.2	5.8

COICOP	EU-15 (2)	BG	CY	CZ	EE	HU	LT	LV	MT	PL	RO	SI	SK	AL
Food and non-alcoholic beverages	16.1	46.5	:	25.2	35.7	28.9	48.1	42.1	:	35.1	55.3	26.1	33.0	63.2
Alcoholic beverages, tobacco and narcotics	2.8	3.9	:	3.5	3.4	4.3	4.0	2.8	:	3.3	2.7	3.4	3.6	4.7
Clothing and footwear	6.9	8.2	:	7.7	7.7	6.6	8.0	7.1	:	7.0	7.4	8.4	10.3	2.7
Housing, water, electricity, gas and other fuels	24.6	14.2	:	17.1	18.7	19.5	12.3	17.0	:	18.4	15.3	10.7	12.4	3.4
Furnishings, household equipment & maintenance	7.0	4.4	:	7.8	5.4	5.4	4.8	4.2	:	5.5	4.3	6.8	6.4	12.4
Health	3.1	3.3	:	1.5	1.6	3.0	3.5	3.5	:	4.4	2.3	1.6	1.2	1.0
Transport	13.1	7.2	:	10.2	6.8	9.2	6.7	6.9	:	8.6	5.2	16.5	8.9	5.4
Communication	2.0	1.9	:	2.0	2.8	4.4	1.9	3.2	:	2.3	1.4	1.9	2.1	0.5
Recreation and culture	9.4	3.0	:	11.0	7.5	6.7	3.5	5.6	:	6.5	2.6	8.8	8.2	3.9
Education	0.7	0.6	:	0.6	1.2	0.4	0.3	1.0	:	1.3	0.6	0.7	0.5	0.3
Restaurants and hotels	6.4	3.5	:	5.0	3.5	3.0	3.8	2.5	:	1.3	0.8	5.9	5.8	0.5
Miscellaneous goods and services	7.9	3.3	:	8.4	5.7	8.6	2.9	4.1	:	6.3	2.1	9.2	7.6	2.0

(1) Classified according to the COICOP classification.
(2) 1994.
Source: Eurostat, Household Budget Survey (theme3/hbs/struc/s_glob).

Table SA.8

Consumer confidence (balance)

	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002
EU-15 (1)	-15.8	-19.2	-25.7	-13.5	-8.0	-14.8	-10.2	-3.8	-2.5	1.2	-4.3	-8.8
B	-6.5	-13.3	-24.7	-10.3	-8.6	-13.1	-12.8	1.7	2.6	13.5	0.6	-2.7
DK	-4.0	-2.4	-2.6	11.3	14.3	8.0	14.0	10.3	4.3	11.3	9.2	8.8
D	-10.8	-15.4	-25.3	-10.9	-6.0	-19.9	-18.0	-5.1	-1.6	2.9	-3.3	-11.4
EL	-33.3	-37.0	-31.1	-29.6	-37.3	-27.3	-29.9	-34.8	-27.0	-15.3	-26.6	-27.8
E	-13.4	-25.9	-30.9	-16.3	-12.8	-9.4	-2.9	0.1	1.7	2.2	-4.0	-11.6
F	-28.2	-27.3	-29.9	-18.6	-13.8	-29.8	-21.5	-11.6	-8.7	-2.8	-11.1	-15.8
IRL	-23.8	-25.7	-20.8	-10.3	-4.6	-0.2	11.7	12.4	14.0	12.5	-1.6	-7.5
I	-15.4	-21.9	-31.9	-13.1	-5.3	-12.0	-14.1	-7.7	-9.9	-7.6	-2.8	-8.6
L	:	:	:	:	:	:	:	:	:	:	:	7.4
NL	-5.3	-4.5	-15.6	-2.3	7.2	7.9	19.5	23.2	19.3	24.4	3.8	-1.6
A	:	:	:	:	-6.7	-12.7	-9.2	-1.7	4.7	5.9	3.0	4.4
P	-3.8	-13.7	-33.2	-30.9	-22.8	-25.1	-13.7	-14.8	-14.1	-18.0	-24.2	-33.7
FIN	-14.1	-8.3	-8.3	8.8	11.8	12.0	18.3	18.2	17.4	19.7	11.9	13.2
S	:	:	:	:	2.0	-4.8	4.4	10.0	12.4	21.8	5.0	9.6
UK	-17.3	-17.0	-17.8	-15.8	-10.4	-5.5	3.2	-1.8	-3.6	-3.8	-4.6	-3.8

(1) Average of available data.
Source: Directorate-General for Economic and Financial Affairs, Business and consumer surveys (theme1/euroind/bs/bsco_m).

Table SA.9

Gross fixed capital formation as a percentage of GDP (%)

	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002 (1)
EU-15 (2)	21.9	21.2	19.9	19.8	19.8	19.6	19.4	19.9	20.2	20.6	20.1	19.4
B	21.0	20.7	20.0	19.5	19.9	19.9	20.4	20.6	20.9	21.2	20.8	19.7
DK	19.1	17.9	17.1	17.3	18.6	18.6	19.6	20.6	20.3	21.7	21.0	21.2
D	23.8	24.0	23.0	23.1	22.4	21.8	21.4	21.4	21.5	21.6	20.1	18.8
EL (2)	22.6	21.3	20.3	18.6	18.6	19.5	19.8	21.1	21.7	22.6	22.8	23.0
E	25.1	23.1	21.3	21.1	22.0	21.6	21.9	22.8	24.1	25.3	25.0	25.0
F	22.0	20.9	19.4	19.1	18.8	18.5	18.0	18.4	19.2	20.1	20.2	20.0
IRL	17.1	16.9	15.5	16.5	17.5	19.1	20.7	22.2	23.7	24.1	23.3	22.8
I	21.0	20.5	18.4	18.0	18.3	18.3	18.3	18.5	19.1	19.8	19.8	19.3
L	25.3	21.4	23.7	22.4	21.6	21.3	22.3	22.6	24.0	20.5	21.7	21.2
NL	21.9	21.6	20.7	20.3	20.3	21.1	21.5	21.5	22.5	22.5	21.9	20.9
A	24.2	23.7	23.2	23.5	23.3	23.3	23.6	23.6	23.5	23.9	23.2	22.5
P	24.9	23.7	22.2	22.3	22.8	23.3	25.6	26.9	27.4	28.6	27.5	25.8
FIN	24.4	19.9	16.4	15.5	16.3	17.0	18.0	18.7	19.0	19.2	19.8	19.4
S	20.6	18.0	15.3	15.1	15.5	15.7	15.2	16.0	17.0	17.3	17.5	17.0
UK	17.9	16.5	15.7	15.9	16.3	16.5	16.5	17.6	17.0	16.7	16.5	15.6
BG	18.2	16.2	13.0	13.8	15.3	13.5	11.0	13.0	15.1	15.7	17.8	18.3
CY (3)	:	:	:	:	19.2	20.4	19.0	19.2	18.1	17.6	17.3	16.0
CZ	24.1	27.9	28.4	28.7	32.0	32.0	30.6	29.1	27.8	28.3	28.3	27.2
EE	:	:	24.2	26.8	25.9	26.7	28.1	29.6	24.9	25.4	26.1	28.3
HU	20.9	19.9	18.9	20.1	20.1	21.4	22.2	23.6	23.9	24.2	23.7	22.9
LT	22.5	23.0	23.1	23.1	23.0	23.0	24.4	24.3	22.1	18.5	19.3	20.4
LV	6.2	11.2	13.8	14.9	15.2	18.3	18.8	27.3	25.2	26.5	27.3	26.2
MT	29.6	27.5	29.5	29.7	31.9	28.7	25.3	24.5	23.4	26.3	23.2	22.8
PL	19.5	16.8	15.9	17.9	18.6	20.7	23.5	25.2	25.5	24.9	21.5	19.4
RO	14.4	19.2	17.9	20.3	21.4	23.0	21.2	18.2	17.7	18.9	19.0	19.0
SI	20.6	18.6	18.8	20.1	21.4	22.5	23.4	24.6	27.4	26.7	24.9	24.7
SK	:	:	30.4	26.6	25.2	32.4	34.3	36.2	30.3	29.3	31.1	30.2
TR	23.8	23.6	26.5	24.6	23.8	25.1	26.4	24.6	21.9	22.4	17.8	17.5

(1) Forecast. (2) 1991-1994, estimates. (3) 1999 and 2000, provisional.
Source: Eurostat, National Accounts - ESA95 - aggregates (theme2/aggs).

Table SA.10

Business enterprise expenditure on R&D relative to GDP (%)

	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002
EU-15 (1)	1.2	1.2	1.2	1.2	1.2	1.2	1.2	1.2	1.3	1.3	1.3	:
B (2)	1.1	1.2	1.2	1.2	1.2	1.3	1.3	1.3	1.4	1.5	:	:
DK (3)	1.0	1.0	1.0	:	1.1	1.1	1.2	1.3	1.3	1.3	:	:
D	1.8	1.7	1.6	1.5	1.5	1.5	1.5	1.6	1.7	1.8	1.8	:
EL (4)	0.1	:	0.1	:	0.1	0.1	0.1	:	0.2	:	:	:
E (5)	0.5	0.4	0.4	0.4	0.4	0.4	0.4	0.5	0.5	0.5	0.5	:
F (6)	1.5	1.5	1.5	1.5	1.4	1.4	1.4	1.4	1.4	1.4	:	:
IRL (7)	0.6	0.7	0.8	0.9	1.0	0.9	0.9	0.9	0.9	:	:	:
I (8)	0.7	0.7	0.6	0.6	0.5	0.5	0.5	0.5	0.5	0.5	0.5	:
L	:	:	:	:	:	:	:	:	:	1.2	:	:
NL (9)	1.0	0.9	1.0	1.0	1.0	1.1	1.1	1.1	1.1	:	:	:
A (10)	:	:	0.8	:	:	:	:	1.1	:	:	:	:
P	:	0.1	:	:	0.1	:	0.1	:	0.2	:	:	:
FIN (11)	1.2	1.2	1.3	1.4	1.5	1.7	1.8	1.9	2.2	2.4	2.7	:
S (10)	1.9	:	2.2	:	2.6	:	2.8	2.9	2.8	:	:	:
UK (12)	1.4	1.4	1.4	1.4	1.3	1.2	1.2	1.2	1.3	1.2	1.2	1.2

(1) Estimates. (2) 1992-2000, estimates. (3) 1992, 1996, 1999 and 2000, estimates. (4) 1991, 1993 and 1999, estimates. (5) 1996, 2000 and 2001, estimates.
(6) 1991 and 2000, estimates. (7) 1991-1998, estimates. (8) 1997-2001, estimates. (9) 1993 and 1999, estimates. (10) 1998, estimate.
(11) 2000, estimate; 2001, provisional. (12) 2000, estimate; 2001 and 2002, provisional.
Source: Eurostat, R&D expenditure at the national level (theme9/rd_ex_p/rd_nat/nat_exp/nat_exp).

Table SA.11

industrial confidence indicator (balance)

	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002
EU-15 (1)	-13.1	-18.4	-25.4	-4.9	-1.3	-14.4	-3.9	-2.8	-8.3	3.2	-9.5	-11.8
B	-15.0	-20.4	-28.8	-6.3	-9.1	-17.8	-2.9	-7.8	-8.6	1.9	-14.0	-11.9
DK	-7.8	-7.3	-9.5	12.5	5.4	-8.7	5.5	-0.8	-12.9	5.7	-1.7	-4.0
D	0.7	-17.3	-33.3	-14.8	-5.9	-21.2	-10.1	-5.0	-14.4	-2.3	-14.8	-19.4
EL	-6.6	-3.7	-6.0	-0.1	3.8	-2.4	3.6	4.3	1.3	8.8	4.3	3.1
E	-21.8	-24.8	-34.8	-8.7	-3.3	-14.4	-1.4	1.4	-3.1	3.2	-4.2	-5.7
F	-21.0	-21.2	-34.4	-3.3	-2.3	-17.5	-5.3	5.3	-2.2	11.8	-4.0	-9.2
IRL	-8.8	-3.9	-12.8	2.5	7.1	-1.1	3.3	3.2	5.0	9.8	-7.7	-7.2
I	-12.6	-15.4	-17.6	1.3	6.4	-11.5	-0.3	0.3	-4.0	11.7	-2.8	-3.7
L	-24.1	-27.7	-25.0	-7.7	9.7	-22.0	4.2	6.7	-11.0	5.3	-15.5	-22.5
NL	-4.4	-6.3	-10.3	-0.9	1.5	-2.4	2.5	1.7	-0.4	4.1	-3.5	-4.8
A	-8.8	-17.4	-27.2	-7.5	-12.2	-23.9	-9.5	-8.6	-13.8	-2.8	-13.3	-16.3
P	-7.3	-11.8	-24.8	-3.9	-3.9	-9.6	0.4	2.2	-4.3	2.1	-5.8	-12.0
FIN	:	:	-4.5	18.2	7.8	-11.3	11.2	2.0	-3.8	17.4	-6.8	-5.7
S	:	:	:	:	:	-15.9	-0.9	3.1	-7.1	10.8	-18.7	-13.1
UK	-31.8	-23.6	-10.9	1.8	2.6	-5.1	-1.4	-15.5	-14.3	-6.6	-15.6	-14.6

(1) Average of available data.
Source: Directorate-General for Economic and Financial Affairs, Business and consumer surveys (theme1/euroind/bs/bssi_m).

Table SA.12

Capacity utilisation rates for total industry (%)

	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002
EU-15 (1)	83.4	81.5	78.3	79.5	83.1	81.2	81.8	83.3	81.9	83.8	83.1	81.0
B	79.4	77.4	74.8	77.6	80.9	79.5	81.4	82.7	80.9	84.0	82.3	79.6
DK	81.0	79.7	77.7	81.8	83.4	81.7	83.3	85.5	82.2	82.5	82.8	81.2
D	88.2	84.8	78.8	80.2	84.6	82.2	83.2	85.5	84.0	85.9	85.1	82.0
EL	77.2	78.3	76.0	74.5	76.6	75.6	74.4	75.8	75.7	78.1	77.6	77.0
E	77.6	76.6	72.8	74.5	78.4	77.1	78.3	80.3	79.7	80.6	79.6	77.2
F	86.0	84.3	81.4	80.4	85.4	83.5	82.3	83.8	85.3	87.5	87.4	85.3
IRL	75.5	77.1	73.6	74.9	79.9	77.6	75.9	76.6	75.9	78.6	78.4	75.9
I	77.3	76.3	74.4	75.2	78.1	76.5	76.4	78.5	76.0	78.8	78.9	77.3
L	82.1	79.8	80.1	81.3	82.9	79.0	82.4	88.0	84.9	87.8	88.7	85.1
NL	84.6	83.5	81.0	82.4	84.4	83.9	84.4	85.3	84.0	84.7	84.6	82.9
A	:	:	:	:	:	80.2	82.0	83.7	81.9	84.5	83.1	80.6
P	79.1	77.4	73.9	77.3	79.7	78.9	80.9	81.4	80.8	81.2	81.7	79.4
FIN	:	:	82.3	86.9	87.7	83.2	87.2	88.9	86.1	86.8	85.7	82.7
S	:	:	:	:	:	85.0	85.7	85.1	85.8	87.5	83.6	83.1
UK	79.2	78.5	80.0	82.8	84.4	82.5	83.8	83.7	79.4	81.3	79.7	79.0

(1) Average of available data.
Source: Directorate-General for Economic and Financial Affairs, Business and consumer surveys (theme1/euroind/bs/bsin_q).

Table SA.13

Trade balance of goods (million EUR) (1)

	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001
EU-15	:	-34 709	11 946	21 293	28 225	43 040	70 137	44 984	12 056	-59 965	-483
B/L	1 674	2 879	5 039	5 740	7 297	6 848	6 909	11 326	10 925	8 780	10 201
DK	4 135	5 738	6 672	6 397	5 093	6 077	4 741	3 450	6 038	7 387	7 768
D	15 405	21 563	35 171	42 970	48 814	54 737	62 097	68 572	65 815	61 995	98 875
EL	-8 160	-8 939	-9 015	-9 556	-11 092	-12 278	-13 647	-12 364	-16 901	-21 935	-21 302
E	-24 924	-23 304	-12 764	-12 426	-14 046	-12 818	-11 838	-18 391	-28 585	-37 778	-35 265
F	-7 602	1 857	6 349	6 719	8 417	11 784	23 728	23 437	18 791	-3 580	3 786
IRL	3 391	5 434	6 927	7 844	10 359	12 391	16 472	20 809	22 733	27 698	33 561
I	-155	2 414	28 236	29 865	33 680	47 796	41 412	31 854	22 051	10 360	17 783
NL	:	9 523	14 482	15 739	16 862	16 007	20 663	18 873	19 170	19 852	23 592
A	:	-7 900	-7 706	-8 924	-5 087	-5 734	-3 761	-3 268	-3 376	-2 990	-1 469
P	-6 350	-7 274	-6 806	-6 788	-6 860	-7 120	-8 709	-10 852	-12 943	-15 107	-14 507
FIN	:	2 915	5 342	6 339	9 443	8 856	10 136	11 157	11 453	14 896	14 142
S	:	5 216	6 442	8 059	12 301	14 660	16 067	15 180	15 806	16 460	15 220
UK	-14 670	-17 765	-17 257	-13 959	-13 975	-16 862	-17 827	-32 247	-41 552	-49 757	-53 924

(1) EU-15, trade with non-Community countries; Member States, trade with all partners (intra-EU and extra-EU).
Source: Eurostat, International trade in services (theme2/bop/its).

Table SA.14

Trade balance of services (million EUR) (1)

	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001
EU-15	:	13 840	12 904	11 852	12 017	12 837	16 183	10 446	8 002	6 649	9 043
B/L	1 381	2 065	2 591	3 015	1 806	2 297	3 272	3 630	5 739	8 574	7 781
DK	2 240	1 775	1 397	447	544	1 020	293	-502	1 487	2 575	3 772
D	-18 208	-24 366	-28 878	-34 509	-35 012	-34 866	-36 445	-40 268	-49 039	-54 128	-56 940
EL	4 887	4 963	6 898	7 892	6 580	7 012	9 253	6 073	6 852	8 733	8 798
E	10 292	9 598	10 002	12 515	14 224	16 100	17 636	19 532	21 524	24 244	27 138
F	12 864	13 573	13 749	15 622	13 712	12 821	16 176	16 837	17 930	21 492	19 926
IRL	-945	-2 354	-2 526	-3 463	-4 808	-6 048	-7 945	-11 859	-10 688	-13 065	-16 357
I	-641	-2 688	706	1 594	1 301	1 599	1 772	3 582	1 104	1 142	362
NL	:	206	587	1 162	1 690	3 054	3 737	3 272	2 341	-939	-2 209
A	:	9 053	8 471	8 346	3 527	3 586	870	2 107	1 647	1 744	1 445
P	937	817	1 198	1 064	1 234	1 118	1 292	1 716	1 765	2 079	2 918
FIN	:	-1 896	-1 700	-1 189	-1 618	-988	-1 057	-930	-1 324	-2 442	-2 537
S	:	-2 191	-657	-838	-1 136	-1 421	-2 179	-1 952	-2 197	-3 419	-1 058
UK	4 766	6 632	6 885	5 587	8 440	11 793	18 096	18 725	17 904	19 423	17 806

(1) EU-15, trade with non-Community countries; Member States, trade with all partners (intra-EU and extra-EU).
Source: Eurostat, International trade in services (theme2/bop/its).

Table SA.15

Labour force characteristics, 2001 (1)

	EU-15	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK
Number of persons employed (thousands)																
Total	160 947	4 039	2 712	36 528	3 918	15 877	23 672	1 709	21 373	185	7 621	3 697	4 984	2 396	4 330	27 908
Male	92 447	2 338	1 457	20 376	2 431	10 007	13 043	1 014	13 358	111	4 570	2 063	2 731	1 256	2 267	15 425
Female	69 061	1 700	1 260	16 152	1 486	5 870	10 635	703	8 015	74	3 495	1 634	2 252	1 147	2 073	12 565
Activity rate (% share of persons employed aged 15-64)																
Total	69.0	63.6	79.2	71.3	62.1	64.2	68.6	67.6	60.3	64.1	75.7	70.7	71.7	77.1	78.1	75.2
Male	78.1	72.7	83.3	78.8	76.2	78.1	75.1	79.0	73.7	76.1	84.2	79.0	79.3	79.6	80.2	82.5
Female	60.0	54.5	75.0	63.7	48.8	50.3	62.3	56.0	47.1	52.0	66.9	62.3	64.5	74.7	76.0	67.7
Full-time and part-time work (% share of persons employed)																
Part-time	18.0	18.5	20.1	20.3	4.1	8.1	16.4	16.6	9.1	11.3	42.2	17.2	11.1	12.0	21.0	24.8
Full-time	82.0	81.5	79.9	79.7	95.9	91.9	83.6	83.4	90.9	88.7	57.8	82.8	88.9	88.0	79.0	75.2
Unemployment rate (% share of labour force aged 15-64)																
Total	7.4	6.2	4.2	7.8	10.4	10.4	8.6	3.7	9.7	1.8	2.1	4.0	4.1	10.4	4.8	4.7
Male	6.5	5.7	3.7	7.8	6.9	7.3	7.0	3.8	7.5	1.6	1.8	4.0	3.1	10.0	5.1	5.2
Female	8.5	6.9	4.8	7.8	15.6	15.2	10.5	3.5	13.1	2.2	2.5	4.1	5.3	10.8	4.4	4.1

(1) NACE Sections A to Q.
Source: Eurostat, Labour Force Survey.

Table SA.16

Average number of hours usually worked per week by persons aged 15-64, 2001 (hours)

NACE label (NACE code)	EU-15	B	DK	D	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK
Total (A to Q)	37.7	37.5	36.4	36.8	43.3	40.1	36.9	37.7	39.0	38.2	31.7	38.4	40.1	38.4	36.9	38.1
Mining and quarrying (C)	42.3	38.6	:	39.6	41.9	40.1	39.1	42.0	40.0	:	38.0	38.0	42.4	:	:	51.0
Manufacturing (D)	39.2	39.0	37.2	37.4	43.7	40.8	37.8	39.5	40.4	40.2	35.2	38.5	40.8	39.3	38.3	42.3
Electricity, gas & water supply (E)	38.7	38.7	38.3	38.1	39.9	39.9	35.9	39.2	39.1	:	36.1	38.9	38.9	38.8	39.2	41.5
Construction (F)	41.2	40.5	40.0	40.0	43.8	41.1	39.4	42.1	41.6	40.3	39.5	39.4	41.8	41.5	39.8	44.5
Distributive trades (G)	37.6	39.7	34.9	35.5	45.9	41.5	37.9	35.4	42.3	38.9	30.4	36.5	42.2	37.4	36.5	34.4
Hotels and restaurants (H)	39.1	42.2	31.8	38.9	49.5	43.9	41.1	34.1	42.4	43.8	26.8	39.7	48.1	36.6	36.1	31.0
Transport, storage & communication (I)	40.2	40.1	38.6	39.3	47.5	42.3	37.2	40.2	40.2	39.1	35.0	39.9	41.8	39.7	37.9	43.2
Financial intermediation (J)	38.0	38.3	37.5	37.8	40.3	39.5	37.2	37.8	38.5	38.7	34.3	36.9	37.7	38.4	37.5	38.6
Real estate, renting & business activities (K)	37.9	38.4	38.0	36.6	43.1	38.2	37.8	38.1	39.2	38.3	33.8	36.1	40.0	37.4	37.6	39.5

Source: Eurostat, Labour Force Survey (theme3/lfs/worktime/ewhana).

Table SA.17

Unemployment rates (% share of labour force aged 15-64)

	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001
EU-15	:	:	:	:	10.8	11.0	10.9	10.3	9.5	8.5	7.4
B	7.0	6.7	8.1	9.7	9.4	9.5	9.0	9.4	8.7	6.6	6.2
DK	9.2	9.2	10.9	8.1	7.0	6.9	5.4	5.1	5.2	4.5	4.2
D	5.3	6.4	7.7	8.8	8.2	8.9	9.9	9.9	8.9	8.0	7.8
EL	7.8	8.1	8.8	9.1	9.3	9.9	9.8	11.0	12.0	11.3	10.4
E	16.1	17.9	22.4	24.5	22.9	22.4	21.0	18.9	15.7	14.0	10.4
F	9.2	10.3	11.4	12.7	11.9	12.5	12.7	12.1	12.0	10.3	8.6
IRL	16.1	15.4	15.9	14.8	12.2	11.9	10.4	7.8	5.8	4.3	3.7
I	10.2	9.6	10.4	11.5	11.9	12.3	12.5	12.3	11.8	11.0	9.7
L	1.5	2.0	2.3	3.5	2.9	3.3	2.5	2.8	2.4	2.4	1.8
NL	7.3	5.6	6.3	7.2	7.2	6.5	5.6	4.4	3.6	2.7	2.1
A	:	:	:	:	4.4	5.3	5.2	5.5	4.7	4.7	4.0
P	4.1	4.1	5.5	7.0	7.4	7.7	6.9	4.9	4.9	4.1	4.1
FIN	:	:	:	:	17.2	15.7	15.1	13.3	11.8	11.2	10.4
S	:	:	:	:	8.2	9.7	10.5	9.1	7.7	5.5	4.8
UK	8.6	9.9	10.4	9.7	8.8	8.3	7.2	6.3	6.1	5.6	4.7

Source: Eurostat, Labour Force Survey (theme3/lfs/unempl/urgan).

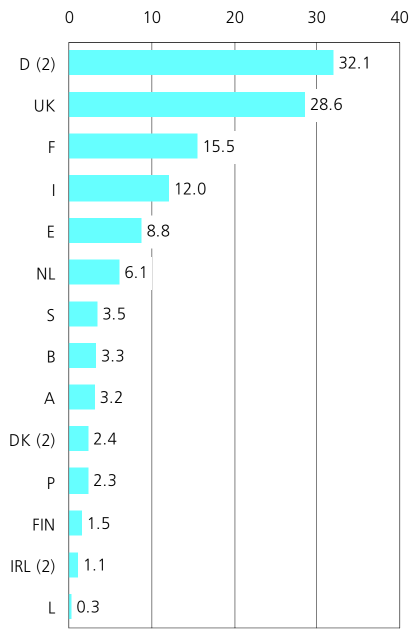
Motor trades

STRUCTURAL PROFILE

Value added in the motor trades' sector in the EU was estimated at EUR 126.4 billion in 2000. Turnover in 1999 was EUR 877.2 billion, 16.2 % of the distribution total. The turnover share of the distribution total was higher than the equivalent value added share (15.1 %) and could well have been boosted by the high unit price of motor vehicles. Employment in the EU motor trades' sector was estimated at 3.2 million persons in 2000, 13.5 % of the distribution total.

Figure 16.1

Sale, maintenance and repair of motor vehicles (NACE Division 50)
Value added, 2000 (billion EUR) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

The United Kingdom had the largest motor trades' market, recording turnover of EUR 213.0 billion in 2000. Germany had the second largest market (EUR 147.5 billion, 1999). The five largest Member States accounted for three quarters of the turnover of this sector in 1999.

The sector is heavily dependent on very small and small enterprises (see Table 16.1). Enterprises with less than 10 persons employed 42.5 % of the total number of persons active in this sector in 2000 (1) and enterprises with between 10 and 49 persons employed another 30.5 %; the corresponding figures for distribution as a whole were 38.3 % and 21.5 %.

(1) D, FIN and S, 1999; EL, IRL and L, not available.

Motor trades (NACE Division 50) covers the wholesale, retail sale and repair of motor vehicles and motorcycles, as well as the retailing of automotive fuel and lubricants.

NACE

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 vehicle parts and accessories;
50.4: sale, maintenance and repair of motorcycles and related parts and accessories;
50.5: retail sale of automotive fuel.

Table 16.1

Size class breakdown of the number of persons employed, NACE Division 50, 2000 (units)

	1 to 9 persons employed	10 to 49 persons employed	50 to 249 persons employed	More than 249 persons employed	Total
B	41 370	25 251	7 564	7 227	81 412
DK	18 668	28 090	:	:	66 388
D (1)	154 305	231 667	129 372	58 016	573 360
E	174 271	112 143	38 040	17 875	342 329
F	189 634	133 472	80 161	44 724	447 991
IRL	:	:	:	:	:
I	321 112	102 403	22 581	4 660	450 756
L	:	:	:	:	:
NL	56 690	54 773	26 965	14 304	152 732
A	20 753	31 289	16 836	10 686	79 564
P	66 710	35 379	20 700	6 718	129 507
FIN (1)	14 762	7 566	6 002	6 684	35 014
S (1)	33 612	15 088	15 850	11 676	76 226
UK	201 254	151 566	100 349	155 069	608 238

(1) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/sizclass/trade_ms).

LABOUR AND PRODUCTIVITY

According to the LFS, the low share of men in employment generally found in distribution (52.9 %) was not present in motor trades, where the proportion of men in the labour force was 81.5 % in 2001. This share was much higher than in retail and wholesale trades and higher than in any other services' NACE division except for railway transport (NACE Division 60) and sewage and refuse disposal (Division 90). However, the share of men in the motor trades' workforce fell from a peak of 83.1 % in 1998 to its 2001 level. The share of full-time employment was also higher in motor trades (90.4 %) than in distribution (77.0 %) and again was higher than in most other service sectors.

SBS data indicates that the proportion of paid employees in the total number of persons employed in motor trades in 2000 (2) was 79.9 %, the same as retail trade but lower than wholesale trade. The remaining 20.1 % of the motor trades' workforce were self-employed persons or unpaid family workers.

Apparent labour productivity was EUR 39 100 in 2000 (3) in motor trades, considerably higher than in retail trade (EUR 24 400) but lower than wholesale trade (4) (EUR 51 400). However, the higher proportion of part-time employment in the other distribution sectors makes this simple productivity measure misleading. A comparison of value added with personnel costs (adjusted for the incidence of self-employment and unpaid family workers) produces wage adjusted labour productivity, which eliminates differences due to part-time employment and also takes into account sectoral differences in average personnel costs. Using this measure, productivity in motor trades (5) (value added was 187.1 % of personnel costs) was higher than wholesale trade (6) (179.8 %) and well above the retail trade figure (165.9 %).

(2) D, 1999; EL and IRL, not available.
(3) D, DK and IRL, 1999; EL, not available.
(4) L, also not available.
(5) D and DK, 1999; EL and IRL, not available.
(6) L, also 1999.

Table 16.2

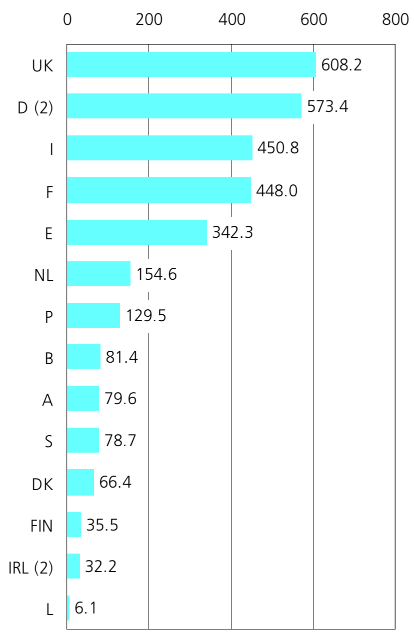
Sale, maintenance and repair of motor vehicles (NACE Division 50)
Labour force characteristics (% of total employment)

	Female		Part-time		Self-employed	
	1996	2001	1996	2001 (1)	1996	2001 (2)
EU-15	17.5	18.5	8.4	9.6	22.1	20.0
B	17.0	18.2	6.6	10.0	26.5	23.6
DK	16.4	20.8	18.3	20.3	15.5	11.6
D	21.8	22.7	9.3	10.5	11.6	12.0
EL	10.9	12.6	:	2.9	43.9	40.2
E	10.1	13.5	3.3	4.1	24.2	23.0
F	20.1	19.3	7.6	7.3	14.5	13.7
IRL	13.9	19.1	:	12.8	29.5	22.6
I	12.0	14.5	3.2	5.6	45.1	42.0
L	17.5	18.7	:	:	:	12.9
NL	14.1	19.2	21.3	30.6	14.6	13.1
A	17.9	21.1	5.8	7.9	9.6	7.8
P	12.1	13.4	:	:	28.3	27.3
FIN	17.6	16.2	10.6	7.2	24.7	18.9
S	20.2	19.9	13.5	18.2	23.6	18.0
UK	21.9	19.5	13.5	13.2	17.0	15.6

(1) EL, 1998.
(2) L, 2000.
Source: Eurostat, Labour Force Survey.

Figure 16.2

Sale, maintenance and repair of motor vehicles (NACE Division 50)
Number of persons employed, 2000 (thousands) (1)



(1) EL, not available.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

16.1: SALE AND REPAIR OF MOTOR VEHICLES

These activities cover the wholesale, retail and commission sale of new and used motor vehicles (NACE Group 50.1) and motorcycles (part of Group 50.4), as well as parts and accessories (Group 50.3). The distribution of lorries, trailers and caravans is included.

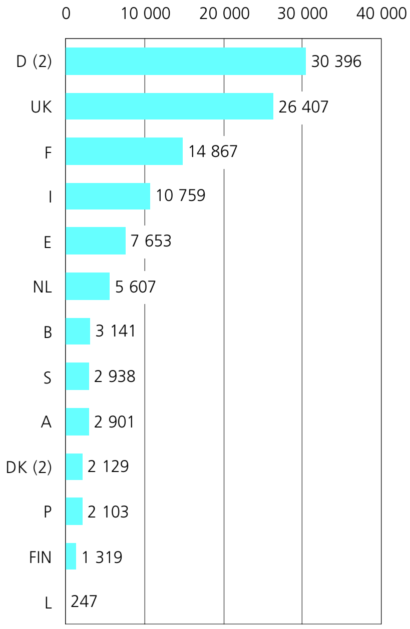
This subchapter also covers the maintenance and repair of motorcycles (part of Group 50.4) and of motor vehicles (Group 50.2). This includes all types of repairs (mechanical, bodywork and electrical), spraying and painting, regular servicing, washing and polishing, as well as the installation of replacement parts and accessories. Equally it covers tyre repair and fitting, towing, roadside assistance and car cleaning services. The renting of motor vehicles is not covered (see Chapter 22).

Many EU Member States have mature markets for motor vehicles, and growth of sales of new vehicles is usually determined by overall economic conditions and consumer sentiment: as purchases of replacement cars may well be delayed when the economy is weaker. The competitiveness and efficiency of this sector is important as the purchase of motor vehicles, motorcycles, parts, accessories and repairs accounts for a large proportion of household expenditure. In 1999 [7] expenditure on these items ranged from 5.2 % of total household consumption in the Netherlands to 11.7 % in Luxembourg.

[7] F and P, not available.

Figure 16.3

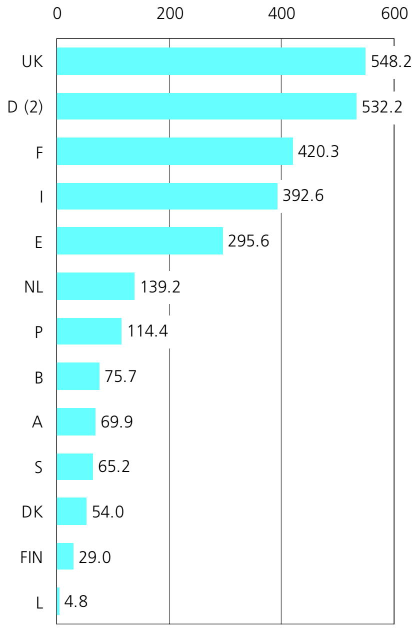
Sale, maintenance and repair of motor vehicles
(NACE Groups 50.1, 50.2, 50.3 and 50.4)
Value added, 2000 (million EUR) (1)



(1) EL and IRL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 16.4

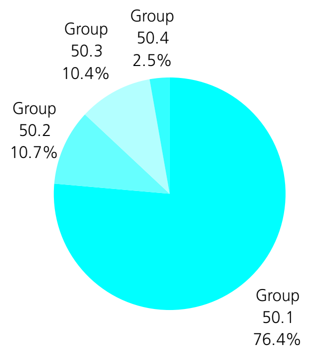
Sale, maintenance and repair of motor vehicles
(NACE Groups 50.1, 50.2, 50.3 and 50.4)
Number of persons employed, 2000 (thousands) (1)



(1) EL and IRL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 16.5

Share in turnover of the sale and repair of motor vehicles in the EU, 2000 (1)



(1) D and DK, 1999; EL and IRL not available.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Table 16.3

Sale, maintenance and repair of motor vehicles (NACE Groups 50.1, 50.2, 50.3 and 50.4)
Main indicators, growth rates (%)

	Turnover					Value added					Number of persons employed				
	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000
EU-15	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
B	4.6	4.9	17.8	2.3	9.1	-12.0	-6.7	12.8	10.9	3.9	-1.7	-4.8	6.1	2.4	1.2
DK	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
D	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
EL	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
E	:	:	:	:	4.5	:	:	:	:	8.2	:	:	:	:	6.1
F	:	-0.7	11.1	9.3	5.4	:	-2.1	9.1	7.6	2.0	:	0.8	-0.4	3.5	4.0
IRL	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
I	25.0	16.7	22.5	-5.2	4.6	34.3	-2.6	12.7	-0.3	4.9	1.4	-1.0	2.7	2.4	0.3
L	7.8	6.8	-1.1	20.8	8.2	-1.2	5.4	9.0	5.6	11.7	2.6	4.0	-4.0	-0.3	4.9
NL	:	2.3	13.4	11.8	8.9	:	-49.4	12.1	9.3	11.9	0.5	4.3	4.5	-2.2	12.1
A	:	:	8.1	3.6	6.0	:	:	3.2	8.8	3.5	:	:	6.0	-2.5	2.5
P	:	10.0	15.5	-3.9	9.7	:	11.3	7.7	-4.5	9.2	:	5.8	-8.2	-9.8	6.2
FIN	9.3	13.6	12.2	9.6	3.4	0.1	9.6	10.0	-0.4	3.6	-3.5	6.4	9.5	2.1	2.2
S	16.7	10.2	0.7	16.4	10.8	10.8	4.5	1.8	11.2	11.4	:	:	5.6	0.1	4.0
UK	10.7	29.5	6.1	6.6	6.8	:	:	1.2	8.4	4.3	:	:	:	-0.1	-0.5

Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

STRUCTURAL PROFILE

Turnover in the EU's sale and repair of motor vehicles' subsector was EUR 803.9 billion in 2000 (8) and employment was 2.74 million persons. The sale of motor vehicles (NACE Group 50.1) accounted for just over three quarters of the turnover total (see Figure 16.5) and was the largest group in turnover terms in all Member States, accounting for at least two thirds of turnover, reaching 87.3 % in Luxembourg (9). Turnover derived from the maintenance and repair of motor vehicles (NACE Group 50.2) peaked at 17.3 % in Austria and was less than 4 % in the Netherlands and Luxembourg. The sale of motor vehicle parts and accessories (NACE Group 50.3) was fairly consistently within the narrow range of 7 to 13 % of this subsector's turnover in all Member States. The sale, maintenance and repair of motorcycles (NACE Group 50.4) was the smallest part of this subsector in every Member State, with its largest share reported in Italy (5.2 %).

(8) D and DK, 1999; EL and IRL, not available.
(9) D, DK and IRL (incomplete), 1999;
EL, not available.

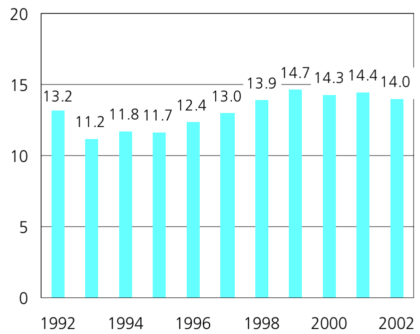
All Member States with data for 1999 and 2000 (10) reported an increase in turnover for the sale and repair of motor vehicles, ranging generally from 3.4 to 10.8 %.

Figure 16.6 shows that new car registrations in the EU in 2002 were approximately 14.0 million, a reduction of 0.4 million compared to 2001 and below the most recent peak of 14.7 million units which was recorded in 1999.

(10) D, DK, EL and IRL, not available.

Figure 16.6

New car registrations in the EU (millions)



Source: Eurostat, European Business Trends (theme4/ebt).

Figure 16.7 shows the density of enterprises in the sale and repair of motor vehicles' subsector relative to population. This ratio had a particularly low value in Germany and Austria, which is unsurprising as these two Member States reported the largest average size for enterprises in this subsector, 11.8 and 9.4 persons employed per enterprise respectively (11). The average size of enterprises (in employment terms) was generally larger for enterprises selling motor vehicles than for other activities: only in France, the Netherlands and the United Kingdom was this not the case as enterprises selling parts and accessories were larger (12). The activity with the smallest average workforce per enterprise was the sale, maintenance and repair of motorcycles, except in Denmark, where the average size of enterprises active in the maintenance and repair of motor vehicles was smaller.

In July 2002 the European Commission adopted a new framework for competition rules in the motor trades' sector (13). This new legislation has regulated the sector since 1 October 2002 and replaced a previous Commission regulation which, according to an evaluation in 2000, had not achieved all of the Commission's original aims, in particular consumers did not seem to have fully benefited from the single market. It is hoped that this new framework, which affects both sales and after-sales services, will make cross-border purchases within the single market easier and lead to greater price competition.

(11) B and D, 1999; EL and IRL, not available.
(12) B and D, 1999; EL and IRL, not available.
(13) Commission Regulation (EC) No 1400/2002 of 31 July 2002 on the application of Article 81(3) of the Treaty to categories of vertical agreements and concerted practices in the motor vehicle sector (OJ L 203, 1.8.2002, p. 30). Detailed information is available from the Directorate-General for Competition, http://europa.eu.int/comm/competition/car_sector/distribution/.

The latest survey of price differentials for motor vehicles across the EU (14) was carried out in May 2002, shortly before the new Commission regulation was adopted. These differentials exist on the basis of pre- or post-tax evaluations. Differentials can be explained in part by different specifications or tax regimes. Generally pre-tax prices are low in Spain, Greece, Finland and Denmark and are usually much higher in Germany, Austria and the United Kingdom. The low prices in Greece, Finland and Denmark may to some extent reflect manufacturers attempts to offset partially the high taxes in these countries. The May 2002 results, compared with previous surveys, did not show any notable convergence and confirmed that price differentials are still higher for cheaper cars than for more expensive ones.

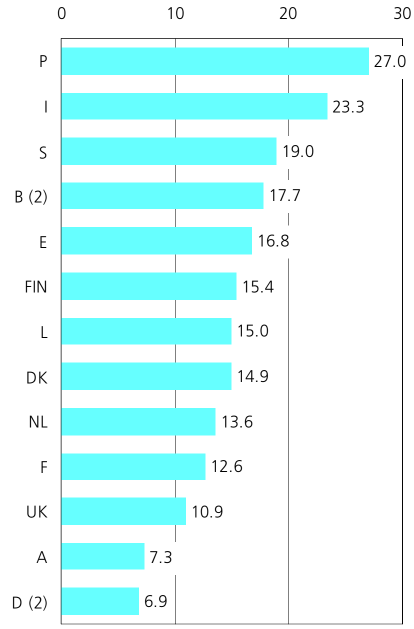
LABOUR AND PRODUCTIVITY

Average turnover per person employed in the EU's (15) sale and repair of motor vehicles subsector was EUR 293 300 in 2000 and apparent labour productivity was EUR 40 300 per person employed.

(14) *'Car price differentials within the European Union'* on 1 May 2002, Directorate-General for Competition, available at http://europa.eu.int/comm/competition/car_sector/price_diffs/.
(15) D and DK, 1999; EL and IRL, not available.

Figure 16.7

Sale, maintenance and repair of motor vehicles
(NACE Groups 50.1, 50.2, 50.3 and 50.4)
Number of enterprises per 10 000 inhabitants, 2000 (units) (1)



(1) EL and IRL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms) and Demography (theme3/demo/dpop/ppavg).

16.2: RETAIL SALE OF AUTOMOTIVE FUEL

This specialist subsector covers the retail sale of automotive fuel, lubricating and cooling products for motor vehicles and motorcycles (NACE Group 50.5). It does not include the wholesale trade of automotive fuel.

Enterprises in the automotive fuel retail sector sell principally to commercial customers, in particular the road haulage sector and private households. According to the household budget survey (HBS), purchases of fuel and lubricants for personal transport in 1999 (16) accounted for less than 5 % of total household consumption expenditure, except in Italy where they reached 5.4 %.

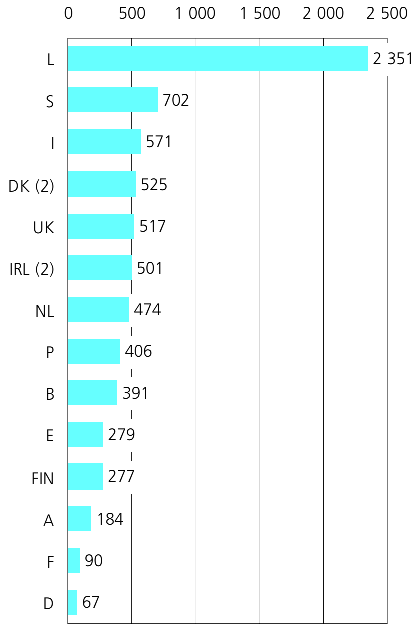
STRUCTURAL PROFILE

SBS data for this subsector report very different performances between the Member States and some care is needed in interpretation. This can be seen in the turnover figures per inhabitant (see Figure 16.8). Normally the differences in this figure could be attributed largely to the average distance driven and the retail price (excluding VAT only) of fuel. However, the figures for Luxembourg are extremely high and those for France, Germany and to some extent Austria are unusually low. The Luxembourg figures are explained principally by high sales to non-residents, due to low prices resulting from low taxes on automotive fuel. In Germany and to some extent Austria the ratio is low because of retailers acting as agents rather than resellers; as such, the turnover of the automotive fuel retailers only reflects their margin on the sales, rather than the value of the sales themselves. In France the share of the retail market for automotive fuels that is accounted for by retailers that are not specialised in automotive fuels (often hypermarkets and supermarkets) is unusually high compared to most other Member States. Sales of automotive fuels by these non-specialists are included in the turnover of their main activity, which is normally in retail trade (NACE Division 52).

(16) F and P, not available.

Figure 16.8

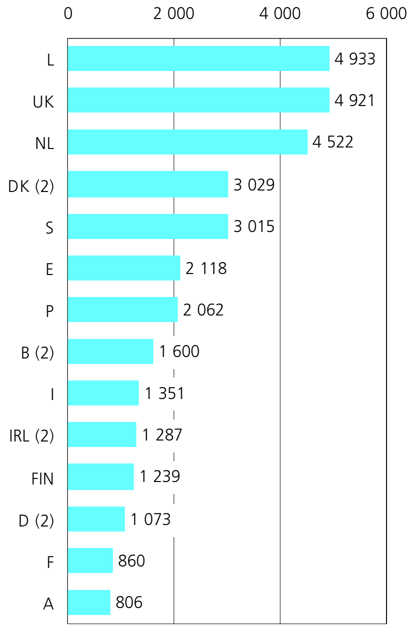
Retail sale of automotive fuel (NACE Group 50.5) Turnover per inhabitant, 2000 (EUR) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms) and Demography (theme3/demo/dpop/ppavg).

Figure 16.9

Retail sale of automotive fuel (NACE Group 50.5) Turnover per enterprise, 2000 (thousand EUR) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

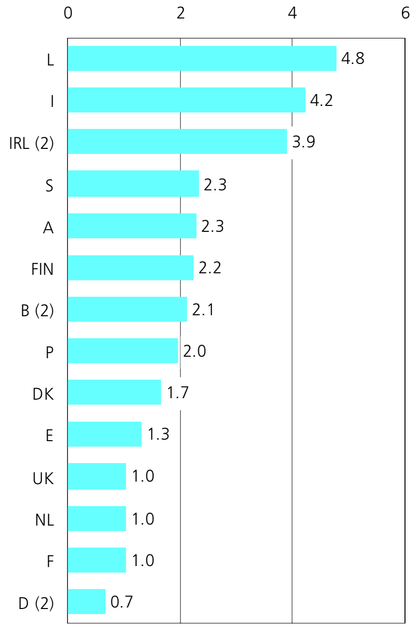
Turnover per enterprise gives an indication of average enterprise size (see Figure 16.9) which indicates that Luxembourg, the United Kingdom and the Netherlands had the largest enterprises in terms of throughput. Irish and Italian enterprises were relatively small using this measure and, as can be seen from figure 16.10, this was a counterbalance to the high density of enterprises relative to the size of population found in these countries.

Value added in the retail sale of automotive fuel sector in the EU (17) was EUR 9.2 billion in 2000 while employment reached 318.6 thousand persons (18). Nearly all Member States (19) reported growth in their value added between 1999 and 2000, with only Italy recording a decline. Growth in excess of 20 % was recorded in the United Kingdom, Luxembourg and the Netherlands. This subsector accounted for between 7 and 14 % of the value added generated in the motor trades' sector in most of the Member States (20). In Luxembourg (16.9 %) and Sweden (15.3 %) it accounted for a greater proportion, while in France (4.3 %), Germany (5.2 %, 1999) and Belgium (5.9 %) its contribution was lower.

(17) D, DK and IRL, 1999; EL, not available.
(18) IRL, 1999; EL, not available.
(19) D, EL and IRL, not available.
(20) D, DK and IRL, 1999; EL, not available.

Figure 16.10

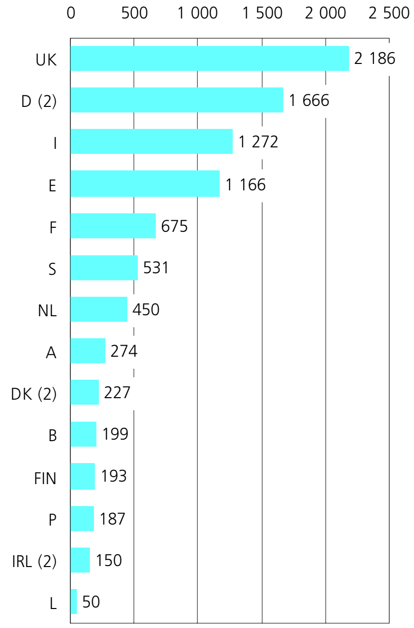
Retail sale of automotive fuel (NACE Group 50.5) Number of enterprises per 10 000 inhabitants, 2000 (units) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms) and Demography (theme3/demo/dpop/ppavg).

Figure 16.11

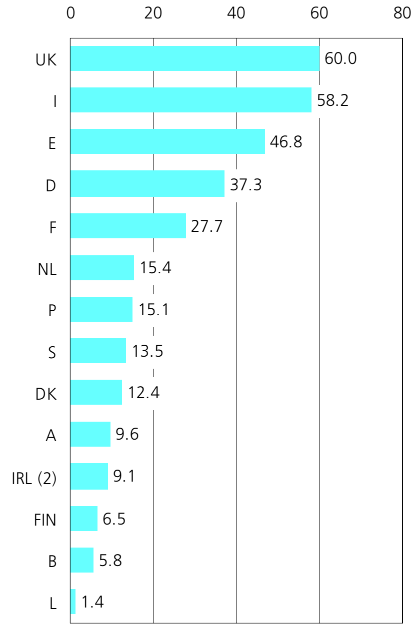
Retail sale of automotive fuel (NACE Group 50.5) Value added, 2000 (million EUR) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 16.12

Retail sale of automotive fuel (NACE Group 50.5) Number of persons employed, 2000 (thousands) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

LABOUR AND PRODUCTIVITY

Apparent labour productivity in 2000 for the retail sale of automotive fuel was EUR 28 700 [21], closer to the average for the retail sector (EUR 24 400) than that of the motor trades' sector (EUR 39 100). The share of paid employees in the number of persons employed was 80.1 %, close to the average for both motor trades and retail trade. The similarity of this subsector with the retail sector ends with a comparison of the EU's wage adjusted labour productivity which was 163.7 % in this subsector [22], above the average for motor trades and well above the average for retail trade.

[21] D, DK and IRL, 1999; EL, not available.
[22] D and DK, 1999; EL and IRL, not available.

Table 16.4

Retail sale of automotive fuel (NACE Group 50.5)
Main indicators, growth rates (%)

	Turnover					Value added					Number of persons employed				
	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000
EU-15	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
B	14.4	22.3	-0.3	13.6	15.2	-11.1	45.4	-5.8	10.5	4.5	2.4	35.9	-7.0	-11.7	7.1
DK	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
D	-8.7	-14.7	-5.4	-0.7	-5.7	:	:	:	:	:	-9.8	-23.5	1.1	-25.3	-9.3
EL	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
E	:	:	:	:	21.0	:	:	:	:	6.4	:	:	:	:	5.4
F	:	1.8	-3.9	5.0	9.0	:	-5.6	0.0	5.6	1.0	:	-2.7	-5.6	-0.5	3.7
IRL	31.7	3.6	17.3	22.4	:	24.5	26.7	2.1	5.3	:	15.7	-9.4	28.7	-10.7	:
I	14.8	6.4	3.0	6.7	9.8	69.7	2.3	-16.0	27.2	-20.2	-0.8	0.4	-3.1	5.6	-3.3
L	3.2	5.2	1.0	-4.0	21.8	-12.0	-7.7	35.6	-31.4	22.0	5.7	-6.5	1.4	-5.8	7.1
NL	5.4	4.2	2.9	11.9	20.1	:	-41.4	1.3	7.4	25.6	31.1	-5.5	-2.6	7.4	23.6
A	:	:	3.2	24.3	-11.3	:	:	17.5	24.1	3.6	:	:	0.8	7.2	6.4
P	:	2.2	14.7	-16.8	14.4	:	6.7	13.0	-9.1	14.8	:	-1.9	9.7	-8.3	1.5
FIN	-6.1	5.4	9.0	2.4	7.1	-4.7	7.5	22.5	-0.4	2.9	0.4	14.2	7.9	5.3	-2.3
S	5.3	-2.8	-4.4	33.4	15.3	7.6	0.8	-5.9	31.1	0.3	:	:	2.7	2.7	-0.1
UK	5.1	39.8	3.8	12.3	24.9	:	:	-10.0	-3.4	29.9	:	:	:	-12.0	-5.3

Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Table 16.5

Sale, maintenance and repair of motor vehicles; retail sale of automotive fuel (NACE Division 50)
Main indicators, 2000

	B	DK (1)	D (2)	EL	E	F	IRL (2)	I	L	NL	A	P	FIN	S	UK
Number of enterprises (units) (3)	20 321	8 851	62 050	:	72 294	80 580	5 881	159 247	865	23 350	7 805	29 636	9 137	18 883	71 569
Turnover (million EUR)	46 704	20 148	147 454	:	76 332	125 170	11 543	131 322	2 980	63 061	21 120	26 278	13 348	31 690	213 031
Number of persons employed (thousands)	81	66	573	:	342	448	32	451	6	155	80	130	35	79	608
Value added (million EUR)	3 340	2 356	32 062	:	8 819	15 542	1 105	12 031	297	6 058	3 175	2 290	1 512	3 468	28 593
Purchases of goods and services (million EUR)	43 633	15 554	115 155	:	69 152	110 535	10 522	123 661	2 789	54 320	17 734	24 326	11 984	28 454	184 296
Personnel costs (million EUR)	1 936	1 593	13 473	:	5 450	12 140	:	5 269	158	3 492	2 070	1 390	936	2 398	13 630
Gross investment in tangible goods (million EUR)	769	301	2 598	:	1 963	1 855	163	1 439	:	886	390	797	262	728	3 196
App. labour productivity (thous. EUR/pers. emp.)	41.0	36.2	55.9	:	25.8	34.7	34.4	26.7	48.6	39.2	39.9	17.7	42.6	44.1	47.0
Wage adjusted labour productivity (%)	123.6	135.6	216.9	:	134.3	119.1	:	116.4	168.7	147.0	139.3	139.9	143.0	125.0	185.5
Gross operating rate (%)	3.0	4.0	12.6	:	4.4	2.7	:	5.1	4.6	4.1	5.2	3.4	4.3	3.4	7.0

(1) All except number of enterprises, persons employed, personnel costs and investment, 1999.
(2) 1999.
(3) B, 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Table 16.6

Sale, maintenance and repair of motor vehicles; retail sale of automotive fuel (NACE Division 50)
Main indicators, 2000

	BG	CY (1)	CZ	EE	HU (1)	LV	LT	MT	PL	RO (2)	SK	SI (2)	TR
Number of enterprises (units)	6 687	:	22 917	1 421	2 037	1 884	4 083	:	73 200	12 299	652	4 344	:
Turnover (million EUR)	1 525	1 040	7 727	929	3 571	897	1 120	:	16 382	2 225	1 960	3 253	:
Number of persons employed (thousands) (3)	32	8	77	11	28	15	26	:	210	84	11	:	:
Value added (million EUR)	120	175	575	83	281	128	104	:	2 044	227	95	255	:
Purchases of goods and services (million EUR)	1 412	776	7 206	859	3 421	799	1 012	:	14 895	2 069	1 807	2 939	:
Personnel costs (million EUR)	48	95	322	48	122	43	69	:	812	86	62	189	:
Gross investment in tangible goods (million EUR)	114	15	207	31	:	57	49	:	528	114	73	121	:
App. labour productivity (thous. EUR/pers. emp.) (3)	3.7	21.8	7.5	7.7	10.0	8.7	4.0	:	6.1	2.7	8.3	:	:
Wage adjusted labour productivity (%) (3)	199.7	138.6	125.8	166.2	226.5	298.9	135.9	:	137.0	188.4	151.3	:	:
Gross operating rate (%)	4.6	7.7	3.3	3.8	4.2	9.6	3.1	:	7.5	5.7	1.7	2.0	:

(1) 1998.
(2) 1999.
(3) PL, 1998.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_cc).

Table 16.7

Sale, maintenance and repair of motor vehicles (NACE Groups 50.1, 50.2, 50.3 and 50.4)
Main indicators, 2000

	B	DK (1)	D (2)	EL	E	F	IRL	I	L	NL	A	P	FIN	S	UK
Number of enterprises (units) (3)	18 146	7 967	56 628	:	67 033	74 406	:	134 843	656	21 680	5 952	27 624	7 979	16 818	65 297
Turnover (million EUR)	42 695	17 355	141 637	:	65 190	119 861	:	98 362	1 949	55 508	19 626	22 130	11 912	25 464	182 168
Number of persons employed (thousands)	76	54	532	:	296	420	:	393	5	139	70	114	29	65	548
Value added (million EUR)	3 141	2 129	30 396	:	7 653	14 867	:	10 759	247	5 607	2 901	2 103	1 319	2 938	26 407
Purchases of goods and services (million EUR)	39 818	12 951	111 092	:	59 235	105 875	:	91 873	1 806	47 228	16 521	20 362	10 729	22 690	155 690
Personnel costs (million EUR)	1 867	1 449	13 039	:	4 678	11 552	:	4 828	131	3 248	1 920	1 248	803	2 016	12 715
Gross investment in tangible goods (million EUR)	703	290	2 507	:	1 631	1 791	:	1 330	:	857	369	752	236	656	2 822
App. labour productivity (thous. EUR/pers. emp.)	41.5	40.1	57.1	:	25.9	35.4	:	27.4	51.9	40.3	41.5	18.4	45.4	45.0	48.2
Wage adjusted labour productivity (%)	122.9	133.6	213.5	:	132.7	119.6	:	117.8	171.1	146.1	139.7	140.5	143.8	123.7	183.4
Gross operating rate (%)	3.0	4.2	12.2	:	4.6	2.8	:	6.0	5.9	4.3	5.0	3.9	4.3	3.6	7.5

(1) All except number of enterprises, persons employed, personnel costs and investment, 1999.
(2) 1999.
(3) B, 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

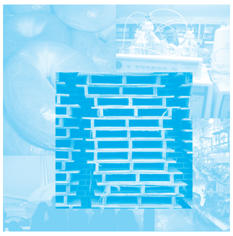
Table 16.8

Retail sale of automotive fuel (NACE Group 50.5)
Main indicators, 2000

	B	DK (1)	D (2)	EL	E	F	IRL (3)	I	L	NL	A	P	FIN	S	UK
Number of enterprises (units) (4)	2 175	884	5 422	:	5 261	6 174	1 462	24 404	209	1 670	1 854	2 012	1 158	2 065	6 272
Turnover (million EUR)	4 010	2 793	5 484	:	11 142	5 309	1 882	32 960	1 031	7 552	1 493	4 149	1 435	6 227	30 863
Number of persons employed (thousands)	6	12	37	:	47	28	9	58	1	15	10	15	6	13	60
Value added (million EUR)	199	227	1 666	:	1 166	675	150	1 272	50	450	274	187	193	531	2 186
Purchases of goods and services (million EUR)	3 816	2 604	4 063	:	9 917	4 661	1 739	31 788	983	7 092	1 213	3 964	1 255	5 764	28 606
Personnel costs (million EUR)	69	144	434	:	772	587	:	441	27	243	150	142	134	383	915
Gross investment in tangible goods (million EUR)	66	11	90	:	332	64	26	109	:	29	20	45	26	72	374
App. labour productivity (thous. EUR/pers. emp.)	34.5	19.0	40.5	:	24.9	24.3	16.5	21.9	37.0	29.3	28.5	12.4	29.8	39.5	36.4
Wage adjusted labour productivity (%)	153.8	147.3	326.4	:	142.9	107.4	:	110.6	160.4	158.3	144.2	127.5	134.6	130.6	213.8
Gross operating rate (%)	3.2	3.0	21.0	:	3.5	1.6	:	2.5	2.3	2.7	8.3	1.1	4.1	2.4	4.1

(1) All except number of enterprises, persons employed, personnel costs and investment, 1999.
(2) All except turnover and persons employed, 1999.
(3) 1999.
(4) B, 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Wholesale trade



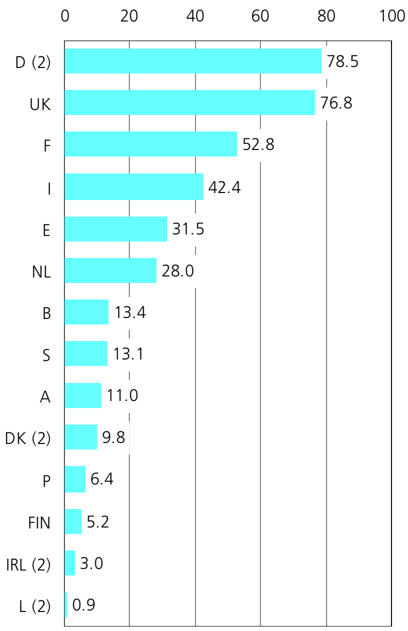
Wholesaling activities involve selling to retailers on the one hand and industrial, commercial, institutional and professional users on the other hand. Two types of wholesalers can be distinguished: wholesalers acting on a fee or contract basis, who charge only for their service as intermediaries; and own-account wholesalers, also known as merchant wholesalers, who buy and resell products. Agents are covered in the first subchapter (17.1) while own account wholesalers are covered by subchapters 17.2 to 17.6. There is a distinction between the types of products that own-account wholesalers trade in, notably between agricultural products, industrial products (capital or intermediate products), consumer products and a miscellaneous set of products (other wholesale trade). These different product categories are subject to different economic cycles, as well as facing different pressures.

Wholesalers can provide a range of services from basic storage and break of bulk, to sorting and grading, logistics or pre- or post-production operations, such as assembly, labelling, packaging, bottling and installation. Wholesaling has come under pressure from direct selling by producers to final customers or retailers, in both cases threatening to cut out or reduce the wholesaler's role in the chain from producer to client. This in turn has led to wholesalers trying to produce more sophisticated value added services.

Figure 17.1

Wholesale trade and commission trade, except of motor and motorcycles (NACE Division 51)

Value added, 2000 (billion EUR) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

STRUCTURAL PROFILE

The estimated number of persons employed in the EU's wholesale trade sector in 2000 was 7.4 million, while value added was estimated at EUR 388.3 billion. This was the equivalent of 46.4 % of total value added in the distribution sector and 31.4 % of employment. Particularly high shares of distribution value added were recorded for this sector in the Netherlands (57.9 %) and Belgium (55.3 %).

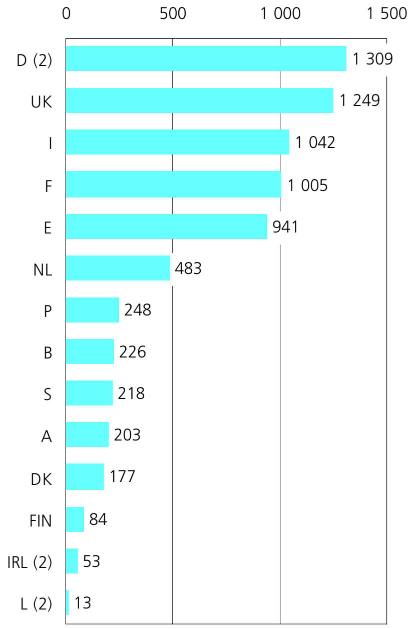
These activities (NACE Division 51) cover all wholesale trade except that concerning motor trade. This chapter covers resale (sale without transformation) of new and used products, as well as wholesale activities carried out on a fee or contract basis.

NACE

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.

Figure 17.2

Wholesale trade and commission trade, except of motor and motorcycles (NACE Division 51)
Number of persons employed, 2000 (thousands) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Own-account wholesaling, covering NACE Groups 51.2 to 51.7, accounted for 92.0 % of the EU's wholesale value added [(1)] in 2000, and 90.0 % of its employment [(2)]. In nearly all Member States these proportions were higher, as the EU figures were heavily influenced by the particular situation of Italy where own-account wholesaling accounted for 69.2 % of wholesaling employment and 76.2 % of value added. In no other Member State did either of these proportions fall below 90 %. An analysis of value added data [(3)] for two recent years, 1998 and 2000, suggests that there was faster growth in own account wholesaling (see Table 17.1) than wholesaling on a fee or contract basis.

[(1)] D, IRL, L and NL, 1999; EL, not available.
[(2)] D, IRL, L and NL, 1999; EL, not available.
[(3)] B, E, F, I, L, A, P and FIN.

Table 17.1

Rates of change of value added, 1998 to 2000 (%) (1)

	Wholesale on a fee or contract basis		Own account wholesaling	
	NACE	Rate of change	NACE	Rate of change
Food, beverages and tobacco	51.17	3.2	51.3	9.7
Household goods	51.15 + 51.16	9.4	51.4	9.1
Intermediate goods	51.12 + 51.13	2.8	51.5	7.5
Machinery and equipment	51.14	7.7	51.6	13.1

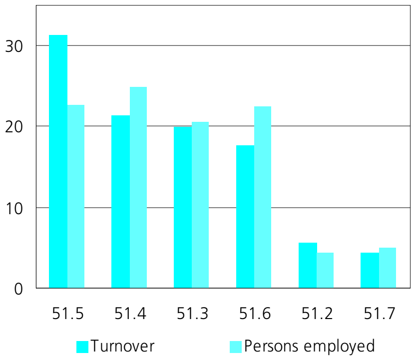
(1) B, E, F, I, L, A, P, FIN.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Wholesaling on a fee or contract basis, by its very nature, accounts for a small proportion of wholesale trade turnover, as these intermediaries do not include the value of the products that they trade within their turnover, but only their fees or commissions for the service provided. For this reason the following analysis of turnover and employment does not cover NACE Group 51.1. Figure 17.3 shows the relative importance of the six own-account wholesaling NACE groups in terms of their respective shares of turnover and employment. The wholesaling of intermediate products (NACE Group 51.5) had the largest level of turnover, accounting for close to one third of own account wholesaling turnover in 2000. The wholesaling of household products (Group 51.4) and food, beverages and tobacco (Group 51.3) each accounted for approximately one fifth of total turnover, while the wholesaling of machinery and equipment (Group 51.6) had a slightly smaller share. The other two groups each accounted for approximately 5 % of the turnover total. A similar situation was seen in most Member States with the most notable difference being the high share of other wholesale trade (Group 51.7) in Finland, where it accounted for 18.7 % of own-account wholesale turnover, whereas it did not exceed even 8 % in any other country. With this one exception the wholesale of agricultural raw materials and live animals (Group 51.2) and other wholesale trade were the two smallest groups in every Member State in turnover terms.

The employment shares between the different own account wholesaling groups present a different picture, notably less importance for wholesaling of intermediate products and higher shares for household products and machinery and equipment.

Figure 17.3

Breakdown of own account wholesale trade in the EU, 2000 (% share of total) (1)



(1) DK, IRL and L, 1999; EL, not available.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Very small enterprises (with less than 10 persons employed) accounted for 32.5 % of employment in wholesale trade in 2000 [(4)], the largest share among the four size classes studied. Nevertheless, this was less than the share of the same size class within the motor trade (42.5 %) or retail trade (40.6 %). Small enterprises (with between 10 and 49 persons employed) accounted for the second largest share of employment with 29.1 %. As with other distribution sectors, the share of very small enterprises in wholesale trade employment varied greatly between Member States: the lowest share was 18.3 % (Denmark) and the highest shares were in Portugal (45.9 %) and Italy (64.4 %). In fact, in Italy, over one quarter (27.8 %) of the wholesale trade workforce worked alone, in enterprises with only one person employed. By comparison, 16.3 % of the workforce in the United Kingdom worked in enterprises with 1 000 persons employed or more.

[(4)] D, FIN and S, 1999, EL and IRL, not available.

LABOUR AND PRODUCTIVITY

According to the LFS, wholesale trade had a higher proportion of full-time employees than retail trade in every Member States in 2001, but a slightly lower share than in the EU's motor trade. In the EU 88.9 % of the wholesale trade workforce worked full time in 2001, approximately 1 percentage point less than five years earlier. The proportion of men in the wholesale trade workforce (68.2 %) was also significantly higher than in retail trade (40.4 %), but much lower than in motor trade (81.5 %). The proportion of men in the workforce also fell by just over 1 percentage point between 1996 and 2001.

In all Member States [5] the wholesale trade sector recorded higher average labour productivity than either motor or retail trade. Average personnel costs were also higher in all Member States, but despite this most Member States reported that wage adjusted labour productivity was higher in this sector than the two other distribution sectors. The exceptions were Germany and the United Kingdom, where the motor trade sector recorded higher wage adjusted labour productivity.

Average labour productivity was generally higher in the wholesaling of intermediate products (NACE Group 51.5) and machinery and equipment (NACE Group 51.6). In the first case this can be attributed to the high volumes in which intermediate products are often traded and in the second case to the relatively high unit values of machinery and equipment. The lowest apparent labour productivity was often recorded in the wholesaling of agricultural raw materials and live animals.

(5) D, IRL and L, 1999; EL, not available.

Table 17.2

Wholesale trade and commission trade, except of motor and motorcycles (NACE Division 51)
Labour force characteristics (% of total employment)

	Female		Part-time		Self-employed	
	1996	2001	1996	2001 (1)	1996	2001 (1)
EU-15	30.6	31.7	10.0	11.1	15.6	15.3
B	32.5	33.7	8.7	11.4	20.8	15.5
DK	29.2	27.2	11.3	8.1	11.1	12.0
D	37.1	37.2	14.0	16.2	11.0	12.7
EL	26.3	29.9	2.5	2.6	29.4	27.3
E	25.8	27.7	5.7	3.8	20.6	18.3
F	31.3	31.3	6.7	7.2	8.7	7.2
IRL	27.4	28.5	6.1	9.2	14.8	15.9
I	27.7	31.1	5.5	8.0	41.6	36.3
L	27.0	30.4	:	9.0	12.6	10.0
NL	24.0	27.7	16.2	20.8	9.7	8.7
A	37.9	36.1	13.3	16.0	7.0	10.3
P	26.8	28.8	:	:	23.9	24.2
FIN	37.8	31.5	10.3	7.0	14.6	11.7
S	26.9	27.4	8.6	9.3	12.9	12.5
UK	29.0	31.6	13.5	15.0	9.3	10.1

(1) L, 2000.
Source: Eurostat, Labour Force Survey.

17.1: WHOLESALE ON A FEE OR CONTRACT BASIS

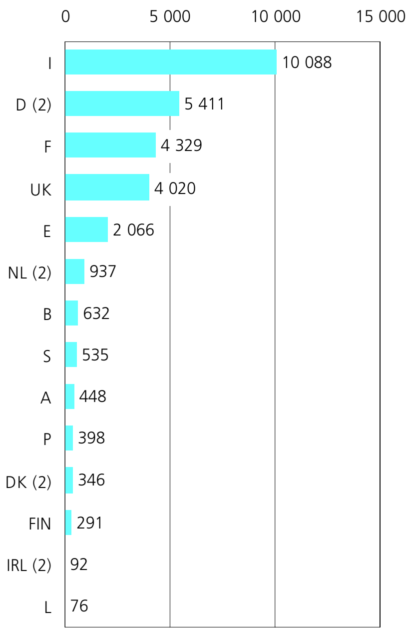
This wholesale subsector covers agents trading on behalf and on account of others, those involved in bringing sellers and buyers together and those undertaking commercial transactions on behalf of a principal (NACE Group 51.1). It does not include financial intermediaries such as insurance or real estate agents, nor retail sale by agents.

These enterprises generally make up a disproportionately small share of wholesaling in turnover terms, as the turnover measured only includes their commissions, whereas the turnover of own-account wholesalers relates to the value of the products resold and not just the margin on these products. As a result in the EU's [6] turnover was 5.0 times higher than value added in this group in 2000, whereas for own-account wholesalers turnover was 8.6 times higher on average.

[6] D, IRL, L and NL, 1999; EL, not available.

Figure 17.4

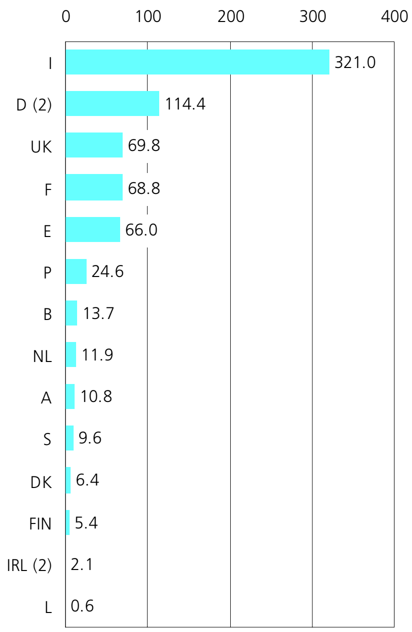
Wholesale on a fee or contract basis (NACE Group 51.1)
Value added, 2000 (million EUR) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 17.5

Wholesale on a fee or contract basis (NACE Group 51.1)
Number of persons employed, 2000 (thousands) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Table 17.3

Wholesale on a fee or contract basis (NACE Group 51.1)
Main indicators, growth rates (%)

	Turnover					Value added					Number of persons employed				
	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000
EU-15	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
B	-27.1	-4.2	7.7	0.6	-3.2	-21.5	-13.0	25.9	-5.0	7.0	-22.9	-14.1	-6.6	5.5	0.4
DK	:	:	:	-1.9	:	:	:	:	6.6	:	:	:	:	3.2	:
D	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
EL	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
E	:	:	:	1.4	13.6	:	:	:	2.8	9.7	:	:	:	2.4	-0.1
F	:	6.9	19.1	18.2	23.8	:	9.7	5.1	11.1	11.0	:	-1.0	3.5	5.3	6.2
IRL	:	-12.0	23.3	72.9	:	:	-20.3	20.8	24.3	:	:	4.9	-3.5	11.6	:
I	:	5.5	26.1	-8.9	10.1	:	10.2	19.2	4.8	3.2	:	3.8	8.9	2.1	-0.7
L	-37.9	6.1	22.2	-32.4	41.5	-23.0	124.9	-52.5	42.1	42.5	18.6	-8.6	11.4	-5.7	9.8
NL	:	:	:	:	18.1	:	:	:	:	:	-1.8	-14.3	2.5	-0.5	18.7
A	:	:	5.0	4.4	28.9	:	:	-0.8	1.6	31.7	:	:	8.2	-0.9	22.5
P	:	-13.9	51.9	-62.8	20.8	:	5.3	9.2	-41.9	23.8	:	-6.0	-8.9	-27.3	5.8
FIN	8.8	1.7	-7.3	-3.6	9.5	-3.2	6.4	-2.4	-9.0	21.3	-6.1	12.3	6.2	3.0	-3.1
S	-9.3	9.0	-4.2	-19.1	8.8	1.3	13.9	-0.6	-1.2	8.4	:	:	-1.3	-7.1	3.6
UK	-10.8	20.2	21.7	14.7	11.1	:	:	17.8	24.3	4.7	:	:	:	21.4	2.0

Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

STRUCTURAL PROFILE

EU employment in this subsector was 725 000 persons employed [7] in 2000 and value added reached EUR 29.6 billion [8]. Italy alone accounted for 44.3 % of the employment total, far ahead of the next largest country, Germany with 16.0 % (1999 [9]). In value added terms Italy's dominance was less pronounced, but it still generated 34.0 % of the total.

Agents specialising in the sale of machinery and equipment (NACE Class 51.14, 13.3 % of the subsector's total) and food, beverages and tobacco (NACE Class 51.17, 13.2 %) were the second and third largest activities in this subsector in the EU [10] in 2000, after the residual category of other specialised agents not elsewhere classified (NACE Class 51.18, 29.3 %). This residual category was particularly important in Italy where it accounted for 41.6 % of the subsector's value added. The smallest parts of the wholesale on a fee or contract basis subsector were agents involved in the sale of agricultural raw materials and live animals (NACE Class 51.11), fuels, ores, metals and industrial chemicals (NACE Class 51.12), timber and building materials (NACE Class 51.13), and furniture and household products (NACE Class 51.15). Each of these activities accounted for 6 % or less of the subsector's value added. Overall, non-specialised agents (NACE Class 51.19, 15.5 %) were more important than the specialist activities, except for the residual category of other specialised agents, although in some Member States non-specialised agents were the largest activity, notably in Portugal where they generated 49.9 % of the subsector's value added. The difference in the importance of other specialised agents and non-specialised agents may be the result of difficulties to classify these units accurately in practice.

(7) D and IRL, 1999; EL, not available.
(8) D, IRL and NL, 1999; EL, not available.
(9) Share of EU total for 1999 excluding EL.
(10) NL, 1999; D, EL, IRL and L, not available.

LABOUR AND PRODUCTIVITY

France, Luxembourg and the Netherlands [11] were the only countries reporting a higher apparent labour productivity in this subsector than in wholesaling in general in 2000. With a few notable exceptions average personnel costs [12] were quite close to the wholesaling average in each country, generally within EUR 5 000. However, in Germany (1999) they were EUR 15 400 lower per employee and in Belgium and the Netherlands (1999) they were EUR 12 300 and EUR 13 000 higher per employee. Wage adjusted labour productivity [13] (which is adjusted for the share of employees in persons employed) was below the wholesaling average in 2000 in every Member State except Germany, Luxembourg, the Netherlands (all 1999), Denmark and France. This measure of productivity was far below the wholesaling average in Portugal and Belgium and in the latter it was below 100 %, indicating that value added did not cover personnel costs (after adjustment for the share of employees in persons employed).

(11) D, IRL, L and NL, 1999; EL, not available.
(12) D, L and NL, 1999; EL and IRL, not available.
(13) D, L and NL, 1999; EL and IRL, not available.

17.2: AGRICULTURAL WHOLESALING

NACE Group 51.2 covers the wholesaling of raw materials for agricultural activities (such as seeds and animal feed) as well as live animals. It does not cover the wholesaling of outputs from farming other than hides, skins and leather and unmanufactured tobacco.

STRUCTURAL PROFILE

Turnover in agricultural wholesaling was EUR 168.7 billion in 2000 (14), more than one quarter of which was reported in France (28.5 %). The number of persons employed was 285 200 (15), of which France accounted for 20.5 %, Germany 17.6 %, Spain 13.4 % and the Netherlands 12.5 %. The share of every other Member States was under 10 %.

(14) IRL and L, 1999; EL not available.
(15) IRL and L, 1999; EL not available.

This subsector was one of the smallest wholesaling activities in the EU. Nevertheless, in France (10.9 %) and the Netherlands (9.3 %) this subsector accounted for a relatively large proportion of turnover in own-account wholesaling (NACE Groups 51.2 to 51.7) in 2000. At the other extreme this subsector accounted for 3.0 % or less of own-account wholesale turnover in the United Kingdom (1.7 %), Luxembourg (2.5 %, 1999), Sweden and Finland (both 3.0 %).

Figure 17.8 shows that the average turnover per enterprise for agricultural wholesaling was low in Portugal, Spain and Italy (typical of wholesale activities in these countries). Among the own-account wholesale activities this was the only NACE group where the average size of French enterprises was particularly large compared to that of other Member States.

LABOUR AND PRODUCTIVITY

Apparent labour productivity in agricultural wholesaling was below the average for own-account wholesaling in all Member States in 2000 (16). Relatively, it was lowest in Sweden and Portugal where it was less than 60 % of the own-account wholesale average, while in France it reached 90.6 %. It should be noted that apparent labour productivity in the United Kingdom fell from EUR 51 900 in 1999 to EUR 38 800 in 2000.

Average personnel costs (17) were also systematically lower in this subsector, ranging from 69.1 % of the own-account wholesale average in Belgium to 91.4 % in Luxembourg (1999). Despite low average personnel costs, the wage adjusted labour productivity for this subsector was still below the own-account wholesale average in every Member States in 2000 (18), except in Belgium. Value added exceeded personnel costs (adjusted for the share of employees in persons employed) by at least 25 % in every Member State, except Sweden.

(16) D, IRL and L, 1999; EL and NL, not available.
(17) D and L, 1999; EL, IRL and NL, not available.
(18) D and L, 1999; EL, IRL and NL, not available.

Table 17.4

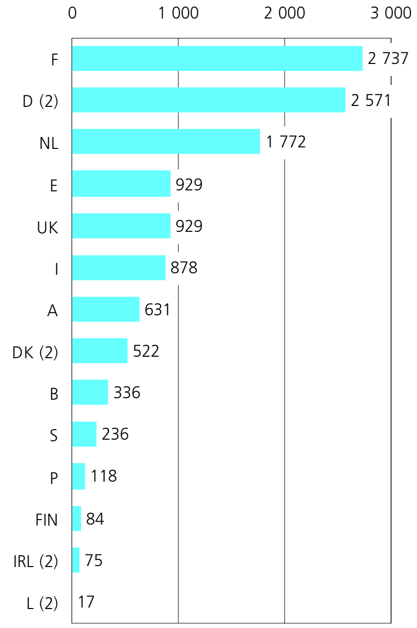
Wholesale of agricultural raw materials, live animals (NACE Group 51.2)
Main indicators, growth rates (%)

	Turnover					Value added					Number of persons employed				
	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000
EU-15	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
B	-20.2	14.2	-9.7	-5.0	10.7	-30.6	5.5	3.2	-9.9	28.3	-22.1	7.3	2.3	-4.6	5.4
DK	:	:	:	-6.9	:	:	:	:	4.8	:	:	:	:	-0.6	:
D	2.2	1.4	-6.4	-8.3	11.7	:	:	:	:	:	-2.5	-1.6	1.3	-2.0	-3.0
EL	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
E	:	:	:	11.5	11.1	:	:	:	-18.3	-0.7	:	:	:	11.5	3.0
F	:	5.9	0.3	-2.1	3.3	:	1.0	1.7	7.4	1.8	:	-0.1	0.8	2.2	4.2
IRL	:	3.7	-31.7	21.6	:	:	73.6	-49.4	40.2	:	:	23.2	-15.9	13.7	:
I	:	-12.0	-8.7	7.6	30.2	:	-10.9	20.6	-20.3	5.6	:	3.8	1.1	0.3	0.7
L	-0.1	-0.9	4.4	1.9	:	-18.7	-5.7	32.4	-14.8	:	1.0	1.3	0.5	0.5	:
NL	-7.1	7.4	3.1	1.4	-0.2	-14.5	9.5	5.0	12.7	8.5	-1.9	-1.1	0.8	-3.1	13.5
A	:	:	-4.4	-4.9	16.1	:	:	-1.7	-4.8	19.2	:	:	1.8	-0.9	5.3
P	:	13.7	-12.5	-29.5	-4.8	:	10.7	0.8	-20.7	-1.7	:	3.4	-1.5	-22.6	-1.1
FIN	3.7	12.0	76.7	-8.9	2.7	23.4	-11.3	34.3	-16.4	2.3	-1.1	-1.1	42.9	-10.5	4.8
S	:	1.4	-6.8	4.7	-0.4	:	2.4	5.5	-6.3	-5.5	:	:	0.3	1.3	1.9
UK	9.4	32.0	-13.7	-4.1	5.4	:	:	-14.1	39.4	-23.5	:	:	:	-2.5	2.3

Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 17.6

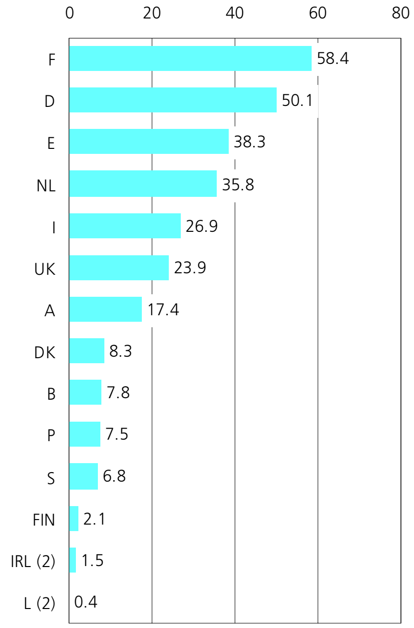
Wholesale of agricultural raw materials, live animals (NACE Group 51.2)
Value added, 2000 (million EUR) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 17.7

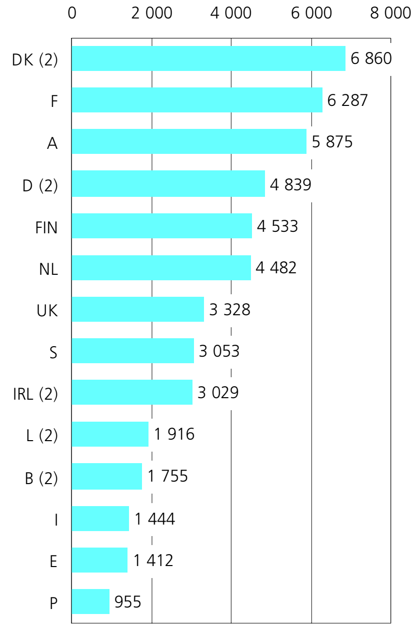
Wholesale of agricultural raw materials, live animals (NACE Group 51.2)
Number of persons employed, 2000 (thousands) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 17.8

Wholesale of agricultural raw materials, live animals (NACE Group 51.2)
Turnover per enterprise, 2000 (thousand EUR) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

17.3: WHOLESALING OF CONSUMER GOODS

The wholesaling of consumer products covers NACE Groups 51.3 and 51.4. The first of these groups includes food, beverages and tobacco and the latter household products, such as textiles, clothing, electrical appliances, games, toys, tableware, furniture and furnishings, as well as cleaning products and personal products. It should be noted that although these two categories are grouped together here as consumer products, these activities include the wholesaling of food and beverage products as inputs for further processing, as well as wholesaling of food and beverage products for distribution towards final consumers.

STRUCTURAL PROFILE

The wholesaling of consumer products (NACE Groups 51.3 and 51.4) generated EUR 1.25 trillion of turnover (19) in the EU in 2000 and EUR 138.3 million of value added (20), while providing employment for 2.97 million persons (21). As a share of own-account wholesale turnover, these two NACE groups accounted for as little as one quarter of the total in Finland (24.9 %), up to around 50 % of turnover in the southern Member States of Italy (49.1 %), Spain (50.8 %) and Portugal (54.3 %), as well as Ireland (51.3 %). In the remaining Member States these activities accounted for a turnover share between 34 and 42 %.

Like most specialised own-account wholesale activities, the wholesaling of consumer products achieved strong turnover growth in current price terms in the second half of the 1990s. Between 1995 and 2000 (22) annual average growth in the United Kingdom was 10.6 %, while exceeding 5 % in the majority of the other Member States. The lowest average growth was recorded in Germany (0.1 % per annum). With the exception of Portugal, the wholesaling of household products grew faster than the wholesaling of food, beverages and tobacco. The only negative rate of change for these two groups was recorded for the wholesale of food, beverages and tobacco in Germany. The highest growth rate was recorded in the United Kingdom where the turnover of household products' wholesaling nearly doubled during the five years studied.

Figure 17.11 shows the average turnover per enterprise of wholesalers of consumer products in 2000, with German enterprises (in 1999) standing out as being considerably larger than those in other countries.

LABOUR AND PRODUCTIVITY

Apparent labour productivity for the wholesaling of consumer products in 2000 (23) was generally less than or equal to the average for own-account wholesaling, and never exceeded the average by more than EUR 100 per person. In all Member States (24), apparent labour productivity for the wholesaling of household products was higher than for the wholesaling of food, beverages and tobacco and the difference exceeded EUR 20 000 per person in the United Kingdom. Average personnel costs were also systematically higher for household products (as their products are generally more complicated and require more technical knowledge) and as a result wage adjusted labour productivity was slightly higher for the wholesale of food, beverages and tobacco products in Finland, the Netherlands and Sweden.

(19) IRL, 1999; EL, not available.
(20) D and IRL, 1999; EL, not available.
(21) IRL, 1999; EL, not available.
(22) F, P and FIN, 1996 to 2000; EL, E and IRL, not available.
(23) D, IRL and L, 1999; EL and NL, not available.
(24) D and IRL, 1999; EL, not available.

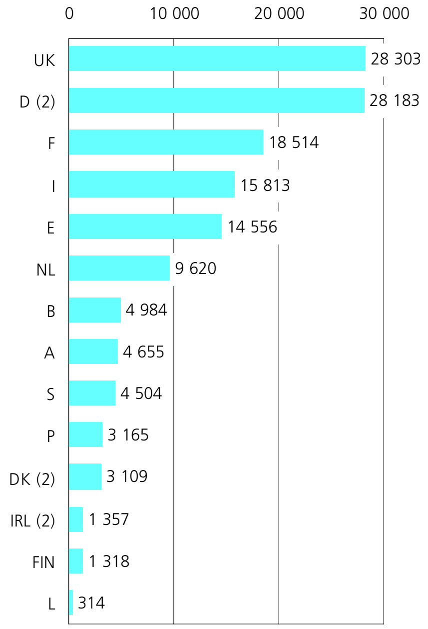
Table 17.5
Wholesale of food, beverages, tobacco and household goods (NACE Groups 51.3 and 51.4)
Main indicators, growth rates (%)

	Turnover					Value added					Number of persons employed				
	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000
EU-15	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
B	3.5	0.1	16.8	1.6	8.8	-4.5	-4.5	3.1	8.8	3.3	-5.2	-3.5	-1.4	2.4	1.1
DK	:	:	:	-3.5	:	:	:	:	3.2	:	:	:	:	-1.7	:
D	-5.0	-2.1	0.4	-3.1	11.2	:	:	:	:	:	-3.1	-1.7	-1.3	-4.2	0.6
EL	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
E	:	:	:	7.8	12.2	:	:	:	-9.7	13.8	:	:	:	-0.3	6.3
F	:	-0.8	4.3	5.1	6.2	:	1.4	3.9	8.5	4.5	:	0.1	-2.3	2.5	2.4
IRL	:	14.8	10.6	12.9	:	:	31.0	14.6	19.3	:	:	12.0	17.4	-0.1	:
I	11.3	-3.4	5.0	8.2	6.9	24.1	-9.5	0.5	9.0	-1.5	12.2	-8.3	1.1	1.7	1.2
L	12.8	11.1	-9.3	25.2	4.6	17.8	6.0	-4.8	18.3	-0.6	6.0	-0.2	-10.6	4.8	9.0
NL	3.1	9.2	9.8	6.9	8.1	-4.9	15.0	12.5	9.9	3.7	-3.4	1.9	4.2	1.7	8.5
A	:	:	2.1	2.8	10.4	:	:	2.5	7.3	12.7	:	:	-0.9	-0.1	4.2
P	:	5.6	19.2	-9.3	11.9	:	20.0	20.1	-9.1	16.4	:	-1.8	3.7	-11.6	7.3
FIN	:	4.3	-6.9	2.1	15.5	:	6.6	-0.4	1.3	12.2	:	3.3	1.5	1.5	8.5
S	7.2	3.1	3.1	10.5	3.4	10.9	6.0	5.9	11.6	11.6	:	:	3.3	1.1	2.4
UK	6.2	30.1	1.9	9.8	6.9	:	:	-9.5	19.5	-0.9	:	:	:	1.4	-0.3

Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 17.9

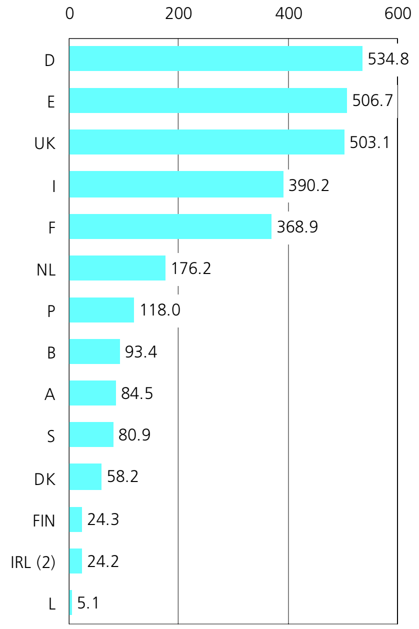
Wholesale of food, beverages, tobacco and household goods (NACE Groups 51.3 and 51.4) Value added, 2000 (million EUR) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 17.10

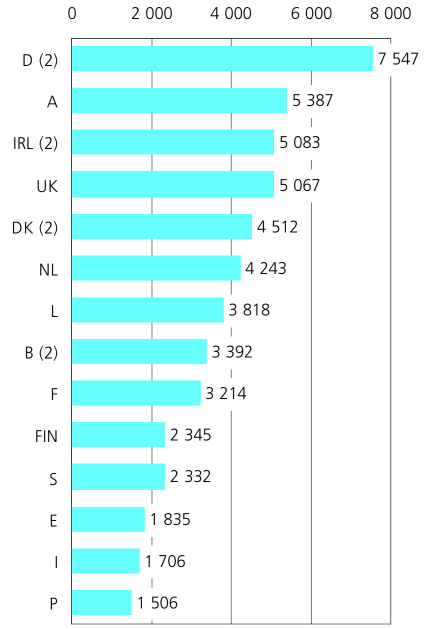
Wholesale of food, beverages, tobacco and household goods (NACE Groups 51.3 and 51.4) Number of persons employed, 2000 (thousands) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 17.11

Wholesale of food, beverages, tobacco and household goods (NACE Groups 51.3 and 51.4) Turnover per enterprise, 2000 (thousand EUR) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

17.4: WHOLESALING OF INTERMEDIATE GOODS

The wholesaling of intermediate products (NACE Group 51.5) covers all products used as raw materials, except for agricultural products (treated in Subchapter 17.2). It includes for example the wholesaling of fuels, construction materials, hardware, chemical products, as well as the wholesaling of scrap.

STRUCTURAL PROFILE

Turnover [25] of the intermediate products' wholesale subsector was EUR 951 billion in 2000, while this subsector generated EUR 84.7 billion of value added [26]. The United Kingdom (21.1 %) and Germany (18.9 %) generated the largest turnover shares, with no other Member State exceeding 10 %.

As such the wholesaling of intermediate products was the largest wholesaling NACE group in turnover terms in the EU. The proportion of own-account wholesaling turnover accounted for by this subsector was fairly constant across Member States [27], ranging from 21.3 % in the Netherlands to 39.0 % in the United Kingdom.

[25] IRL, 1999; EL not available.
[26] D and IRL, 1999; EL not available.
[27] IRL and L, 1999; EL not available.

This subsector's importance in own-account wholesaling was, however, notably lower in employment terms, despite an EU-wide workforce of 1.48 million persons, the second highest of any wholesaling NACE group. The largest national workforce was Germany (330 400 persons), followed by the United Kingdom (264 300 persons).

Figure 17.14 shows the average size of enterprises in this subsector in terms of average turnover per enterprise. In general, enterprises operating in this activity were fairly large, even by wholesale trade standards. Indeed, the two countries with the largest activity in the wholesale trade of intermediate products, Germany and the United Kingdom, also had the largest average size of enterprises, both in excess of EUR 10 million per enterprise.

LABOUR AND PRODUCTIVITY

Apparent labour productivity in the wholesaling of intermediate products was higher in 2000 [28] than the own-account wholesale average in every Member State, except Germany (1999). In Spain it exceeded the average by more than 25 %, but in absolute terms the highest level of apparent labour productivity was in Luxembourg (EUR 79 300 per person employed). In just over half of the Member States this subsector reported the highest level of apparent labour productivity among own-account wholesale activities. Average personnel costs [29] in 2000 were generally within 10 % of the average for own-account wholesalers and exceeded the average only in Germany (by 6.4 %, 1999), Spain (3.4 %), Austria (2.9 %) and Belgium (0.5 %). As a consequence wage adjusted labour productivity levels [30] were higher than the own-account wholesale average in every country, except Germany. Nevertheless, value added exceeded personnel costs (adjusted for the share of employees in persons employed) by nearly 70 % in Germany. The highest wage adjusted labour productivity ratios were recorded in Luxembourg and Finland, where value added was more than double adjusted personnel costs.

[28] D, IRL and L, 1999; EL and NL, not available.

[29] D and L, 1999; EL, IRL and NL, not available.
[30] D and L, 1999; EL, IRL and NL, not available.

Table 17.6

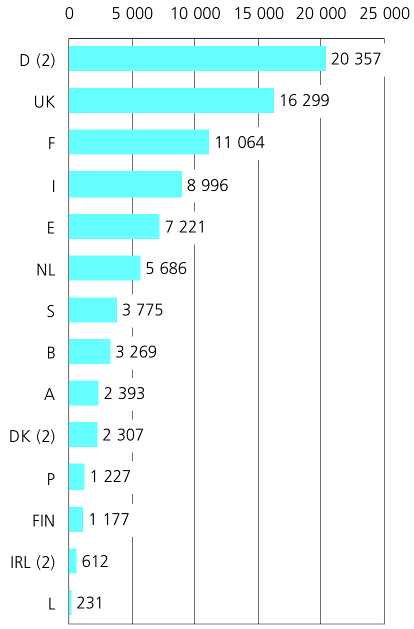
Wholesale of non-agricultural intermediate products, waste and scrap (NACE Group 51.5)
Main indicators, growth rates (%)

	Turnover					Value added					Number of persons employed				
	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000
EU-15	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
B	9.1	4.7	-7.3	8.1	18.9	-7.6	11.9	-13.4	18.7	7.0	-5.6	7.1	-2.8	-1.3	1.8
DK	:	:	:	3.8	:	:	:	:	5.9	:	:	:	:	-0.8	:
D	-5.5	0.3	2.5	-7.2	19.8	:	:	:	:	:	-1.8	-1.0	0.0	-5.8	-0.9
EL	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
E	:	:	:	8.6	12.7	:	:	:	-31.7	37.4	:	:	:	0.0	7.2
F	:	1.1	-1.8	6.8	14.4	:	0.5	6.1	7.8	9.7	:	-1.4	1.1	3.0	4.2
IRL	:	19.2	3.1	-2.5	:	:	35.9	-3.4	6.9	:	:	14.4	5.3	-12.0	:
I	9.3	5.0	-9.8	7.1	17.4	21.0	-16.9	19.7	-6.6	12.4	1.4	1.4	2.4	2.8	2.7
L	-1.2	8.7	-11.9	11.1	7.8	-6.6	4.1	-2.8	-4.4	11.0	3.0	4.3	10.3	-4.4	1.0
NL	-2.5	5.1	4.5	13.3	15.3	-4.6	8.0	5.6	11.1	14.1	6.4	2.4	-2.5	8.8	0.9
A	:	:	-2.2	2.5	20.7	:	:	-2.7	-4.8	4.5	:	:	1.2	-5.3	1.9
P	:	5.4	2.3	-4.4	21.3	:	14.1	10.6	-8.3	9.8	:	5.7	0.6	-6.4	9.6
FIN	5.5	8.3	-1.1	6.2	14.4	-7.6	3.4	1.7	7.6	3.2	1.5	4.7	3.1	-3.3	-5.6
S	9.6	-1.6	-5.8	7.1	29.7	10.3	-2.6	1.9	11.3	18.5	:	:	2.8	-3.0	0.5
UK	25.2	2.3	-13.0	9.9	45.5	:	:	-2.7	29.0	2.1	:	:	:	1.3	2.1

Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 17.12

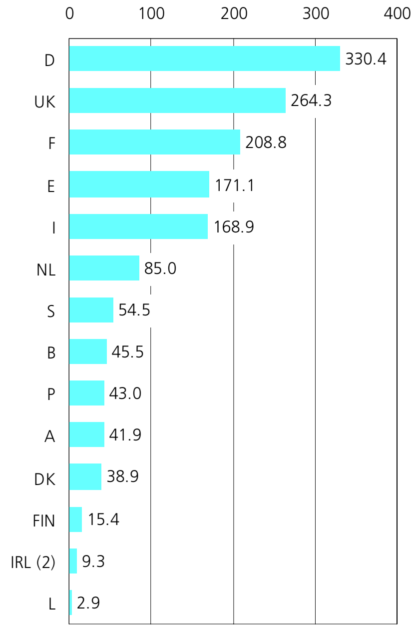
Wholesale of non-agricultural intermediate products, waste and scrap (NACE Group 51.5)
Value added, 2000 (million EUR) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 17.13

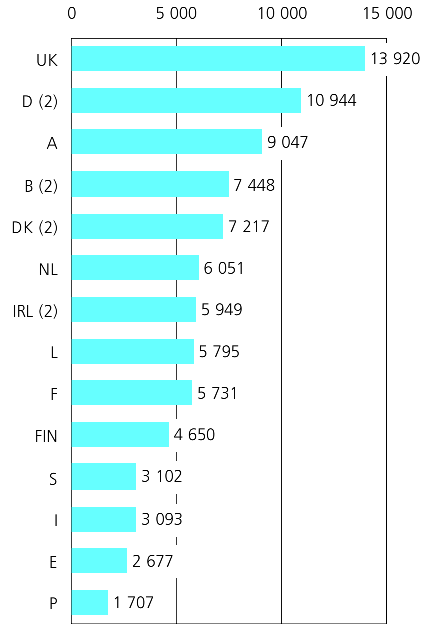
Wholesale of non-agricultural intermediate products, waste and scrap (NACE Group 51.5)
Number of persons employed, 2000 (thousands) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 17.14

Wholesale of non-agricultural intermediate products, waste and scrap (NACE Group 51.5)
Turnover per enterprise, 2000 (thousand EUR) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

17.5: WHOLESALING OF MACHINERY AND EQUIPMENT

The wholesaling of machinery and equipment (NACE Group 51.6) concerns the wholesaling of all capital goods except for those covered by motor trade. Wholesaling of installation equipment, as well as electrical and electronic products for industrial use and the wholesaling of office furniture are all included.

STRUCTURAL PROFILE

Employment in the EU's wholesale of machinery and equipment subsector was 1.47 million in 2000 (31), very close to the total for the wholesale of intermediate products. At its highest, in Finland, this subsector provided 38.0 % of employment in own-account wholesaling and exceeded 30 % in France and all Nordic Member States. However, in several Member States, including most of the southern ones and Germany, it was below 20 %.

(31) IRL, 1999; EL not available.

In turnover terms, this subsector generated EUR 537.0 million in the EU in 2000 (32). Only in the Nordic countries and the Netherlands did this subsector get close to or exceed one quarter of own account wholesale turnover, and in Italy it only just exceeded 10 % of the total. The United Kingdom (20.0 %) and France (19.8 %) each generated one fifth of the EU's turnover in this subsector with Germany (13.9 %) and the Netherlands (12.1 %) reporting the next highest levels.

Every Member State reported growth in turnover for this subsector in current price terms between 1995 and 2000 (33), six of them in excess of 50 % over the period. The highest growth was recorded in the United Kingdom, where turnover more than doubled from EUR 47.4 billion in 1995 to EUR 106.5 billion in 2000. Machinery and equipment wholesalers in the United Kingdom and Germany, like their counterparts in the wholesale of intermediate products, were larger than in other Member States in terms of average turnover per enterprise – see Figure 17.17.

(32) IRL, 1999; EL not available.
(33) F and P, 1996 to 2000; EL, E and IRL, not available.

LABOUR AND PRODUCTIVITY

Apparent labour productivity in the wholesale of machinery and equipment was higher than the own-account wholesale average in 2000 (34) in every Member State, and in several of them this subsector recorded the highest national levels among own-account wholesale activities. Compared to the own-account wholesale average, apparent labour productivity was very high in Germany, 49.4 % higher than the own-account wholesale average at EUR 61 200 (1999). Spain and the United Kingdom also recorded levels more than 25 % higher than their respective own-account wholesale averages (35).

In every Member State in 2000 (36) the highest average personnel costs in the own-account wholesale sector were registered by the wholesale of machinery and equipment. Despite such high costs, nearly every Member State (37) recorded a level of wage adjusted labour productivity that was within 12 % of the average for own-account wholesale. In Germany (1999), Spain and Luxembourg (1999) this ratio was higher than the own-account wholesale average. In Germany and Spain wage adjusted labour productivity was higher than in any other NACE group within the own-account wholesale sector.

(34) D, IRL and L, 1999; EL not available.
(35) D, IRL and L, 1999; EL and NL, not available.
(36) D, 1999; EL and IRL, not available.
(37) D and L, 1999; EL, IRL and NL, not available.

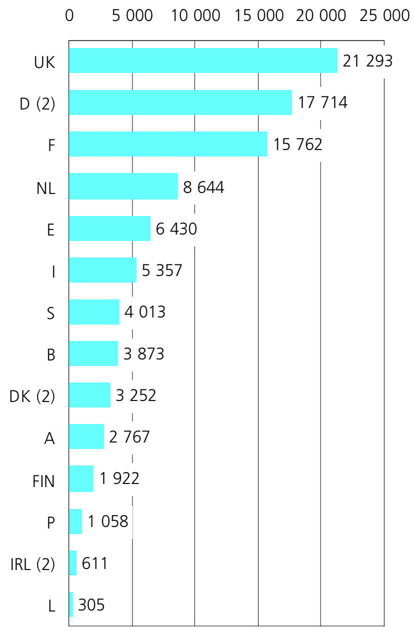
Table 17.7

Wholesale of machinery, equipment and supplies (NACE Group 51.6)
Main indicators, growth rates (%)

	Turnover					Value added					Number of persons employed				
	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000
EU-15	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
B	10.7	9.9	13.0	9.5	10.9	-1.3	-1.2	14.9	8.5	6.4	6.6	5.3	4.5	6.6	6.4
DK	:	:	:	5.2	:	:	:	:	2.4	:	:	:	:	0.5	:
D	-6.0	-1.1	10.4	12.9	-1.6	:	:	:	:	:	-5.1	-1.1	2.5	-4.9	3.6
EL	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
E	:	:	:	9.2	18.7	:	:	:	-1.9	16.7	:	:	:	-4.2	14.8
F	:	5.8	13.7	9.0	9.3	:	1.4	7.9	6.5	6.6	:	0.6	2.9	1.6	3.3
IRL	:	34.4	15.8	-19.2	:	:	43.1	40.9	-23.2	:	:	16.3	17.6	-18.5	:
I	16.5	9.3	22.3	-4.1	26.0	45.2	-6.3	11.0	-5.6	20.6	3.4	2.0	5.3	1.1	12.7
L	-2.5	34.7	-17.5	39.6	9.4	8.6	24.6	-25.8	61.4	0.9	6.3	4.5	6.9	2.5	9.9
NL	21.3	8.9	7.0	26.1	0.9	10.0	-0.2	9.4	33.3	-9.8	17.3	1.4	8.7	:	7.9
A	:	:	6.5	-3.3	24.4	:	:	10.5	-4.0	6.8	:	:	13.4	-9.2	8.7
P	:	12.3	23.4	-12.0	14.2	:	4.9	18.1	-5.7	8.5	:	3.1	7.4	-4.0	3.7
FIN	6.8	10.7	-3.6	5.4	12.3	4.6	5.7	4.3	3.7	10.8	7.3	3.4	2.5	1.7	4.9
S	8.0	7.9	13.3	-1.9	16.2	8.5	6.4	12.3	1.7	9.2	:	:	5.6	-1.3	1.0
UK	29.1	36.8	10.0	3.5	11.7	:	:	14.4	-1.5	6.4	:	:	:	1.4	-5.2

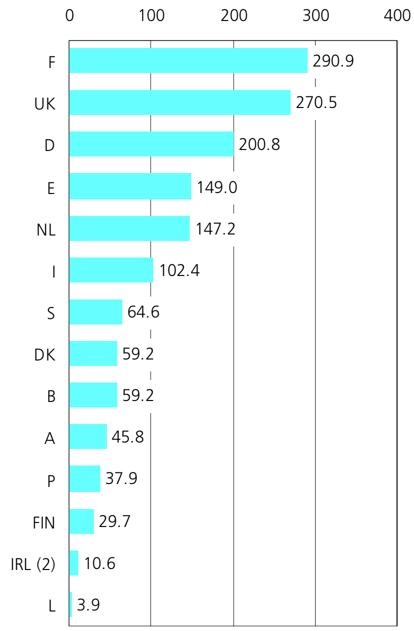
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 17.15
Wholesale of machinery, equipment and supplies (NACE Group 51.6)
Value added, 2000 (million EUR) (1)



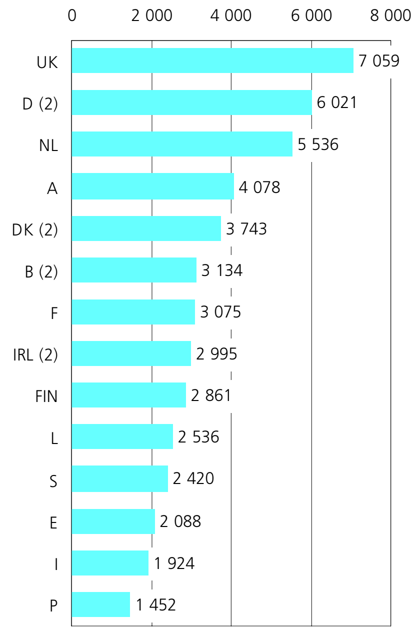
(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 17.16
Wholesale of machinery, equipment and supplies (NACE Group 51.6)
Number of persons employed, 2000 (thousands) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 17.17
Wholesale of machinery, equipment and supplies (NACE Group 51.6)
Turnover per enterprise, 2000 (thousand EUR) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

17.6: OTHER WHOLESALE

The other wholesale subsector (NACE Group 51.7) covers specialised own-account wholesaling of products not covered in other parts of NACE Division 51, as well as non-specialised wholesaling, where enterprises resell a variety of products.

STRUCTURAL PROFILE

This was the smallest own-account wholesale subsector in the EU with turnover in 2000 [(38)] of EUR 133.6 billion, smaller than the wholesale of agricultural raw materials and live animals. From this turnover total, some EUR 15.2 billion of value added [(39)] was generated. This subsector was dominated by the United Kingdom and Germany both of whom generated close to one third of the EU's turnover. In relative terms, this subsector was particularly important in Finland where it generated 18.7 % of own-account wholesale turnover in 2000 [(40)]; the next largest shares were 7.2 % in the United Kingdom and 7.1 % in Germany. In Sweden (0.4 %) and France (0.8 %) this subsector accounted for less than 1 % of own-account wholesale turnover.

(38) IRL, 1999; EL, not available.
(39) D, IRL and NL, 1999; EL, not available.
(40) IRL and L, 1999; EL, not available.

The number of persons employed in this subsector in 2000 [(41)] was 325 900 persons. As for turnover, the United Kingdom and Germany were the largest countries in this subsector, although the workforce in the United Kingdom (117 900 persons) was considerably larger than in Germany (85 600 persons).

Most Member States were able to report turnover growth between 1995 and 2000 [(42)] (in current price terms), with the notable exception of the United Kingdom where a 41.4 % reduction was recorded and Belgium, where a 2.0 % fall was registered. The highest rate of growth was in Luxembourg where turnover nearly doubled (98.4 % increase) over the period considered.

The average size of enterprises in this subsector in 2000 was generally very small (less than EUR 4 million of turnover per enterprise) with two major exceptions, Germany (EUR 27.2 million, 1999) and Finland (EUR 19.9 million) – see Figure 17.20.

(41) IRL, 1999; EL, not available.
(42) F and P, 1996 to 2000; EL, E and IRL, not available.

LABOUR AND PRODUCTIVITY

Other wholesale trade activities recorded apparent labour productivity figures that were below the own-account wholesale average in every Member State [(43)] in 2000. This pattern was particularly evident in Sweden, where labour productivity was 66.0 % of the average. The level of value added per person employed in Luxembourg rose from EUR 30 000 per person in 1999 to EUR 74 000 in 2000, which brought it back into line with the own-account wholesale average in this country.

(43) D, IRL and L, 1999; EL and NL, not available.

Table 17.8

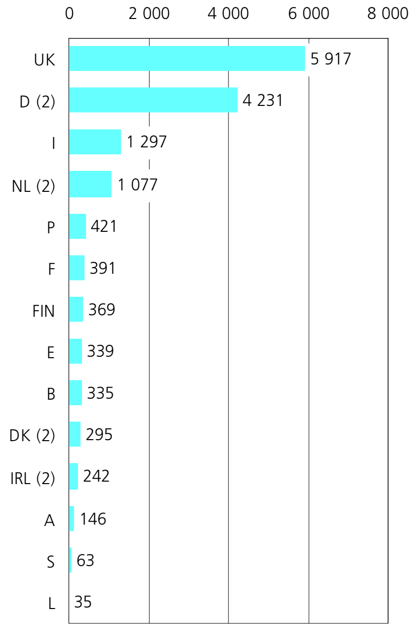
Other wholesale (NACE Group 51.7)
Main indicators, growth rates (%)

	Turnover					Value added					Number of persons employed				
	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000
EU-15	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
B	-22.0	11.6	-5.4	2.2	16.6	-27.8	14.0	-11.9	4.9	12.3	-20.5	-5.9	-3.8	-2.4	-1.8
DK	:	:	:	-2.9	:	:	:	:	-1.0	:	:	:	:	-4.2	:
D	22.4	3.6	-0.7	0.6	6.1	:	:	:	:	:	-0.1	10.0	1.6	-0.7	2.0
EL	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
E	:	:	:	1.8	32.9	:	:	:	2.5	0.8	:	:	:	10.0	1.6
F	:	24.0	7.3	3.8	16.0	:	15.0	19.5	9.5	29.9	:	8.0	14.3	7.1	23.0
IRL	6.7	23.2	13.0	17.1	:	-3.0	24.5	10.4	9.9	:	16.6	3.2	8.9	-2.3	:
I	41.2	4.0	7.7	-27.1	-1.1	48.3	-6.9	-0.5	-10.9	-26.6	12.0	16.5	-9.3	-11.6	-13.6
L	-8.1	8.8	-25.5	160.8	2.1	-11.3	17.8	-20.0	0.7	134.2	0.0	2.2	9.7	-6.8	-4.8
NL	-17.3	10.6	7.5	0.1	5.4	-27.8	15.0	6.2	1.7	:	-14.1	11.7	2.5	:	:
A	:	:	-22.1	-4.2	20.8	:	:	-18.6	14.8	23.5	:	:	-0.9	7.7	-0.1
P	:	14.2	25.8	-19.0	-8.3	:	2.7	29.8	-4.8	-2.4	:	-4.6	27.4	-13.6	-4.7
FIN	-2.9	31.7	17.2	2.8	-4.5	0.2	12.0	21.7	-16.9	-10.3	0.0	43.1	11.2	-2.3	-19.0
S	7.5	75.1	-2.1	-29.1	4.5	10.8	36.1	6.0	-12.9	-2.2	:	:	4.3	-0.9	-6.3
UK	-46.9	21.5	-6.2	-10.2	7.8	:	:	-10.4	-15.0	17.6	:	:	:	-5.7	-3.3

Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 17.18

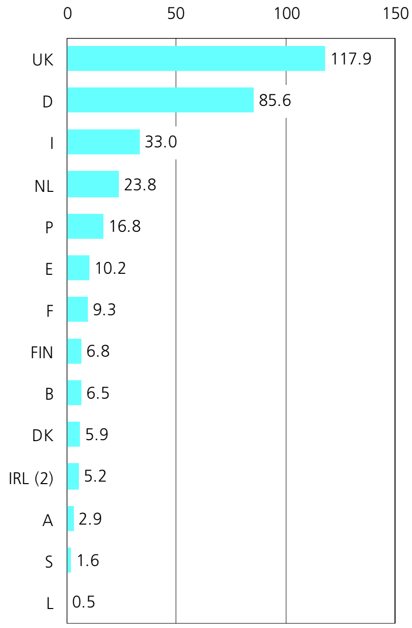
Other wholesale (NACE Group 51.7)
Value added, 2000 (million EUR) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 17.19

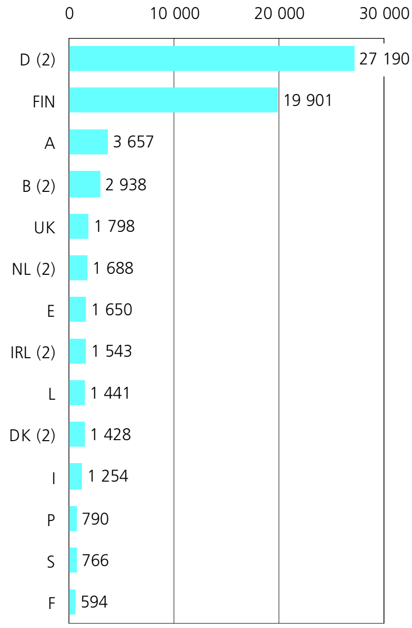
Other wholesale (NACE Group 51.7)
Number of persons employed, 2000 (thousands) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 17.20

Other wholesale (NACE Group 51.7)
Turnover per enterprise, 2000 (thousand EUR) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Table 17.9

Wholesale trade and commission trade, except of motor and motorcycles (NACE Division 51)
Main indicators, 2000

	B	DK (1)	D (2)	EL	E	F	IRL (2)	I	L (2)	NL	A	P	FIN	S	UK
Number of enterprises (units) (3)	42 178	16 592	125 110	:	184 292	162 849	5 666	420 957	2 948	55 190	19 408	50 348	16 264	41 680	118 084
Turnover (million EUR)	152 586	73 498	558 814	:	274 290	527 966	20 993	344 107	8 551	239 017	84 475	56 236	44 984	100 430	628 022
Number of persons employed (thousands)	226	177	1 309	:	941	1 005	53	1 042	13	483	203	248	84	218	1 249
Value added (million EUR)	13 429	9 831	78 467	:	31 541	52 796	2 989	42 428	911	27 986	11 040	6 386	5 161	13 126	76 762
Purchases of goods and services (million EUR)	137 664	61 908	477 664	:	244 920	474 953	18 224	295 548	7 500	210 756	69 794	50 406	40 821	88 944	527 764
Personnel costs (million EUR)	7 778	6 652	40 593	:	17 142	37 512	:	15 505	385	15 966	7 159	3 483	3 016	8 873	41 779
Gross investment in tangible goods (million EUR)	2 248	1 657	6 152	:	5 097	5 645	360	5 820	:	3 072	1 365	1 358	687	1 600	7 581
App. labour productivity (thous. EUR/pers. emp.)	59.4	56.0	60.0	:	33.5	52.5	56.5	40.7	72.3	57.9	54.3	25.8	61.7	60.2	61.4
Wage adjusted labour productivity (%)	138.1	144.4	183.0	:	158.0	138.6	:	138.7	211.3	159.6	142.7	161.9	164.6	134.1	170.4
Gross operating rate (%)	3.7	4.5	6.8	:	5.2	2.9	:	7.8	6.2	5.0	4.6	5.2	4.8	4.2	5.6

(1) All except number of enterprises, persons employed, personnel costs and investment, 1999.
(2) 1999.
(3) B, 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Table 17.10

Wholesale trade and commission trade, except of motor and motorcycles (NACE Division 51)
Main indicators, 2000

	BG	CY (1)	CZ	EE	HU (1)	LV	LT	MT	PL	RO	SK	SI (2)	TR
Number of enterprises (units)	20 481	:	66 536	5 371	4 762	5 191	6 573	:	129 683	:	7 876	19 192	:
Turnover (million EUR)	10 080	2 682	34 475	4 127	13 886	5 159	4 591	:	106 287	:	10 046	6 383	:
Number of persons employed (thousands) (3)	110	18	225	34	90	42	53	:	615	:	76	:	:
Value added (million EUR)	475	458	2 967	367	1 198	606	443	:	10 914	:	939	685	:
Purchases of goods and services (million EUR)	9 941	2 037	32 014	3 765	12 899	4 688	4 176	:	96 218	:	9 034	5 603	:
Personnel costs (million EUR)	162	259	1 425	174	574	156	214	:	3 904	:	408	480	:
Gross investment in tangible goods (million EUR)	348	54	528	125	:	214	115	:	2 005	:	180	153	:
App. labour productivity (thous. EUR/pers. emp.) (3)	4.3	25.7	13.2	10.9	13.3	14.3	8.4	:	12.8	:	12.4	:	:
Wage adjusted labour productivity (%) (3)	234.0	170.9	157.9	199.1	205.9	385.0	196.6	:	214.3	:	226.2	:	:
Gross operating rate (%)	3.0	7.4	4.5	4.7	:	8.7	5.0	:	6.6	:	5.3	3.2	:

(1) 1998.
(2) 1999.
(3) PL, 1998.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_cc).

Table 17.11

Wholesale on a fee or contract basis (NACE Group 51.1)
Main indicators, 2000

	B	DK (1)	D (2)	EL	E	F	IRL (2)	I	L	NL (3)	A	P	FIN	S	UK
Number of enterprises (units) (4)	8 851	1 374	58 636	:	48 890	39 900	648	257 404	514	4 385	4 880	12 807	4 232	3 666	16 478
Turnover (million EUR)	3 407	1 782	7 760	:	3 218	85 300	217	21 072	306	2 943	994	2 351	605	2 973	17 218
Number of persons employed (thousands)	14	6	114	:	66	69	2	321	1	12	11	25	5	10	70
Value added (million EUR)	632	346	5 411	:	2 066	4 329	92	10 088	76	937	448	398	291	535	4 020
Purchases of goods and services (million EUR)	2 939	1 499	2 060	:	1 180	79 102	126	11 339	232	1 314	542	1 977	340	2 509	13 104
Personnel costs (million EUR)	255	223	1 388	:	541	2 824	:	815	16	451	243	193	149	326	1 997
Gross investment in tangible goods (million EUR)	95	23	178	:	197	397	5	1 107	:	105	37	89	29	60	345
App. labour productivity (thous. EUR/pers. emp.)	46.0	53.9	47.3	:	31.3	62.9	44.0	31.4	118.0	93.1	41.6	16.2	53.8	55.8	57.6
Wage adjusted labour productivity (%)	83.2	145.3	272.3	:	119.3	147.3	:	122.0	312.0	193.3	103.9	114.0	152.7	129.0	162.5
Gross operating rate (%)	11.1	7.9	51.8	:	47.4	1.8	:	44.0	19.5	19.5	20.6	8.7	23.5	7.0	11.8

(1) All except number of enterprises, persons employed, personnel costs and investment, 1999.
(2) 1999.
(3) All except turnover and persons employed, 1999.
(4) B, 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Table 17.12

Wholesale of agricultural raw materials, live animals, food, beverages, tobacco, household goods, non-agricultural intermediate products, waste, scrap, machinery, equipment, supplies and other wholesale (NACE Groups 51.2 to 51.7)
Main indicators, 2000

	B	DK (1)	D (2)	EL	E	F	IRL (3)	I	L (3)	NL (4)	A	P	FIN	S	UK
Number of enterprises (units) (5)	33 327	15 218	66 474	:	135 402	122 949	5 018	163 553	2 466	49 525	14 527	37 541	12 032	38 014	101 606
Turnover (million EUR)	149 179	71 716	616 461	:	271 073	442 666	20 777	323 036	8 335	236 271	83 481	53 885	44 379	97 456	610 804
Number of persons employed (thousands)	212	171	1 202	:	875	936	51	721	12	468	193	223	78	208	1 180
Value added (million EUR)	12 797	9 485	73 056	:	29 475	48 467	2 897	32 341	858	26 554	10 592	5 988	4 870	12 592	72 742
Purchases of goods and services (million EUR)	134 725	60 409	475 603	:	243 740	395 852	18 098	284 210	7 339	195 578	69 252	48 429	40 481	86 435	514 660
Personnel costs (million EUR)	7 523	6 430	39 205	:	16 601	34 688	:	14 689	373	14 215	6 916	3 290	2 868	8 548	39 782
Gross investment in tangible goods (million EUR)	2 154	1 634	5 974	:	4 900	5 248	354	4 713	:	3 341	1 328	1 269	659	1 540	7 236
App. labour productivity (thous. EUR/pers. emp.)	60.3	56.0	61.2	:	33.7	51.8	57.0	44.8	71.4	53.7	55.0	26.8	62.2	60.4	61.7
Wage adjusted labour productivity (%)	141.2	144.4	180.9	:	159.8	137.9	:	151.6	209.0	168.8	144.8	167.4	165.5	134.4	170.9
Gross operating rate (%)	3.5	4.5	6.1	:	4.7	3.1	:	5.5	5.8	5.6	4.4	5.0	4.5	4.1	5.4

(1) All except number of enterprises, persons employed, personnel costs and investment, 1999.
(2) All except turnover and persons employed, 1999.
(3) 1999.
(4) 1999, except turnover and persons employed, 2000, labour productivity, 1998.
(5) B, 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Retail trade

Within NACE Division 52, a distinction can be made between retailing on the one hand (hereafter referred to as retail trade) and the activity of repair – the latter is treated in Subchapter 18.8. Within the sector of retail trade, in-store retailing dominates: the particular area of non-store retailing is covered in Subchapter 18.7.

The first six subchapters (18.1 to 18.6) cover the activities traditionally associated with retail trade, namely the resale of goods in stores. Two distinctions can be made within these activities, namely the type of product sold and the degree of specialisation of the retailer. Subchapter 18.1 covers retailers of food, beverages and tobacco products, regardless of whether they are specialised or non-specialised. Among non-food retailers, non-specialised retailers are treated in Subchapter 18.2, and then specialist non-food retailers are covered by Subchapters 18.3 to 18.6.

The household budget survey (HBS) provides information on the proportion of household expenditure accounted for by goods typically sold by the retail trade sector. In all Member States food beverages and tobacco alone accounted for between 12.6 and 24.0 % of the total in 1999 (1) and footwear and clothing accounted for between 4.6 and 8.4 %.

(1) F and P, not available.

STRUCTURAL PROFILE

It is estimated that the retail trade sector (including repair) employed 13.0 million persons in 2000 and generated EUR 321.9 billion of value added. This was approximately 55.1 % of distribution employment total and 38.5 % of distribution value added. In employment terms this was the largest NACE division in the business sector (Sections C to K). In all Member States (2) retail trade (including repair) accounted for more than 45 % of distribution employment in 2000, and this share peaked at just over 62 % in both Ireland (1999) and the United Kingdom.

In absolute terms the largest retail sectors (including repair) were unsurprisingly found in the Member States with the largest populations. Nevertheless, Germany (20.6 %, 1999) accounted for a smaller proportion of EU turnover (3) than the United Kingdom (22.1 %), with France and Italy the only other countries to record a share greater than 10 %. In employment terms the importance of the United Kingdom in this sector was higher still with a 24.0 % share, while Spain also figured among the Member States with 10 % or more of the EU's total.

In value added and employment terms repair accounted for less than 2 % of retail trade (including repair) within the EU (4), and the highest proportion of this sector's value added accounted for by the repair subsector was 2.7 % of employment and 2.1 % of value added in Sweden.

(2) D, IRL and L, 1999; EL, not available.
(3) D and IRL, 1999; EL, not available.
(4) D and IRL, 1999; EL, not available.

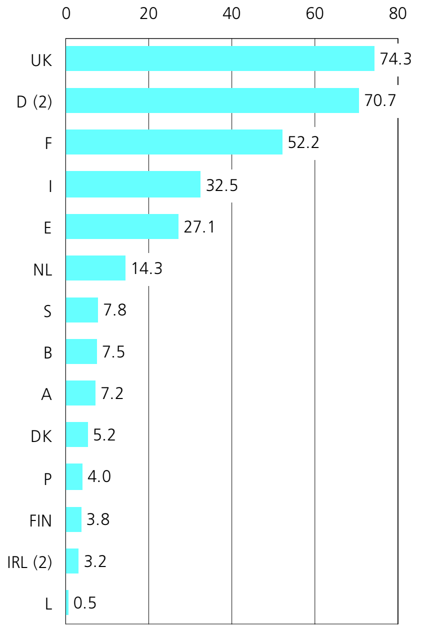
Division 52 of NACE covers retail trade, as well as the repair of personal and household goods. The retail trade of motor vehicles and motorcycles is excluded (see Chapter 16). Retailing covers the resale without transformation of new and used goods to the general public for personal or household use and consumption. Note that the renting and hiring of personal and household goods to the public is excluded. In this chapter repair is not included in the coverage of the retail trade sector unless expressly mentioned.

NACE

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.

Figure 18.1

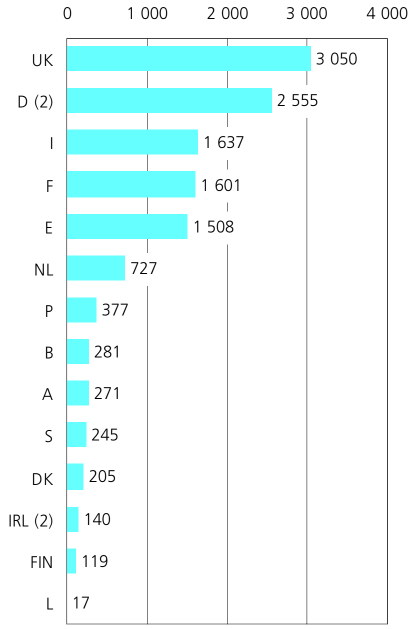
Retail trade, except of motor vehicles, motorcycles; repair of personal and household goods (NACE Division 52) Value added, 2000 (billion EUR) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 18.2

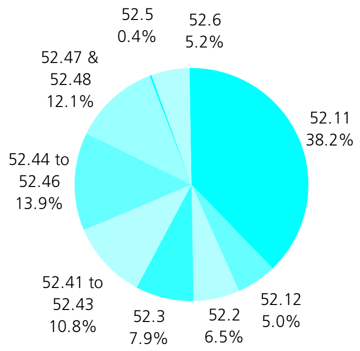
Retail trade, except of motor vehicles, motorcycles; repair of personal and household goods (NACE Division 52) Number of persons employed, 2000 (thousands) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 18.3

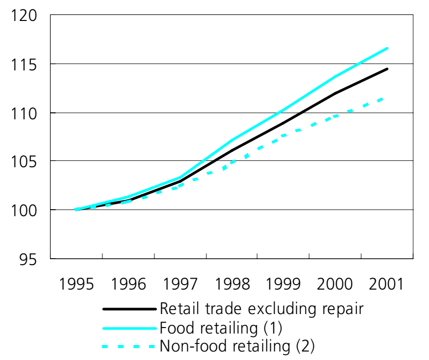
Turnover share in retail trade excluding repair, EU, 2000 (1)



(1) D and IRL, 1999, EL and NL, not available.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 18.4

Index of the volume of sales, working day adjusted, EU (1995 =100)



(1) NACE Class 52.11 and Group 52.2.
(2) NACE Class 52.12 and Groups 52.3 to 52.6.
Source: Eurostat, European Business Trends (theme4/ebt/ebt_ts/retail).

Within the retail trade sector two NACE groups dominated employment and turnover. In 2000 retailing in non-specialised stores (NACE Group 52.1) accounted for 43.2 % of turnover in the EU's retail trade sector [5], of which nearly 90 % was generated by non-specialised retailers with food, beverages or tobacco predominating (NACE Class 52.11). Other retail of new goods in specialised stores (NACE Group 52.4) accounted for a further 36.8 %, such that these two NACE groups together accounted for 80 % of the retail total. Figure 18.3 shows the turnover breakdown by NACE group with a more detailed breakdown of the two largest groups.

(5) D and IRL, 1999; EL and NL, not available or incomplete.

Figure 18.4 shows the evolution of the EU's volume of sales in the retail trade sector, with a distinction between food and non-food retailing. Each year from 1996 to 2001 growth in the retailing of food items was stronger than in the retailing of non-food items.

Retail activities are also seasonal, especially non-food retailing. A large proportion of non-food sales are made in the period leading up to the end of the year, whilst a relatively low proportion of sales are made in January, February and August – see Figure 18.5.

A comparison of the average size of enterprises in terms of the number of persons employed per enterprise showed growth in most countries. Between 1996 and 2000 six of the eight [6] Member States studied recorded growth, which was highest in Denmark where the average grew from 6.1 persons employed to 8.1 persons employed. In Luxembourg the average in 2000 was similar to that in 1996, while in Portugal the average size fell from 3.1 to 2.5 persons per enterprise.

(6) DK, F, I, L, NL, A, P and FIN.

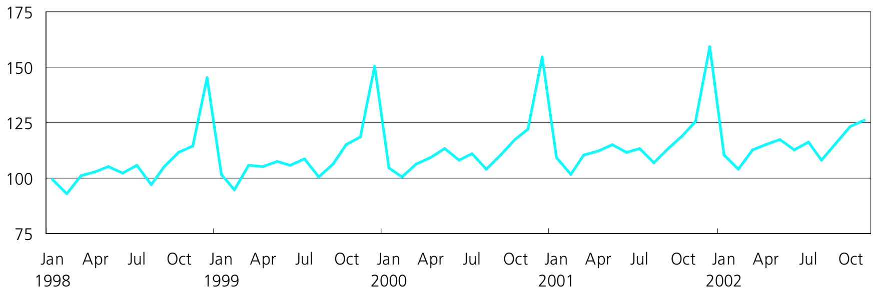
LABOUR AND PRODUCTIVITY

One of the characteristics of the retail trade (including repair) labour force that sets it apart from the other distributive trades and most other sectors is the very high proportion of women. According to the LFS, 6 in every 10 workers in this sector in 2001 were women, a higher proportion than in any other NACE division in the business sector (NACE Sections C to K) except for the manufacture of wearing apparel (NACE Division 18). This sector is also distinguished by the high incidence of part-time work which in 2001 represented 30.6 % of the workforce, the highest proportion of any NACE Division in the business sector. Similarly, the 74.0 % share of employees in the workforce was the lowest of any NACE Division in the business sector in 2001: some 22.4 % of the retail trade (including repair) workforce were self-employed and 3.5 % were family workers.

The retail trade sector (including repair) in the EU recorded the lowest level of apparent labour productivity of any of the distributive trades. It is estimated that in 2000 apparent labour productivity was EUR 24 700 per person employed, compared to EUR 39 600 in motor trades and EUR 52 200 in wholesale trade. It should be noted that this simple measure is influenced by the high rate of part-time workers.

Figure 18.5

Index of the volume of sales for non-food retailing, working day adjusted, EU (1995 =100) (1)



(1) NACE Class 52.12 and Groups 52.3 to 52.6.
Source: Eurostat, European Business Trends (theme4/ebt/ebt_ts/retail).

Table 18.1

Retail trade, except of motor vehicles, motorcycles; repair of personal and household goods (NACE Division 52)
Labour force characteristics (% of total employment)

	Female		Part-time		Self-employed	
	1996	2001	1996	2001	1996	2001
EU-15	57.5	59.6	27.0	30.6	26.6	22.4
B	56.8	57.7	22.4	27.5	35.2	29.8
DK	54.2	57.3	36.7	37.7	13.0	11.4
D	66.7	68.0	31.0	38.1	14.5	13.5
EL	45.3	47.5	4.3	3.6	52.8	47.2
E	54.4	58.5	9.2	10.4	41.1	34.5
F	58.9	60.0	22.9	25.3	20.7	16.9
IRL	55.1	60.5	22.7	35.8	21.9	14.1
I	41.7	46.9	7.5	11.7	53.5	44.7
L	59.9	64.3	11.8	14.4	19.2	12.9
NL	59.9	60.1	55.3	62.3	15.4	12.1
A	68.0	69.7	25.6	31.1	10.3	11.4
P	52.9	57.7	8.5	10.8	50.1	40.7
FIN	65.5	68.2	29.2	33.3	19.2	14.7
S	65.8	62.3	41.5	38.8	24.8	17.9
UK	61.0	60.3	49.8	49.7	11.3	10.4

Source: Eurostat, Labour Force Survey.

18.1: RETAIL TRADE OF FOOD ITEMS

These activities cover the retail sale of food, beverages and tobacco, either in specialised stores (NACE Group 52.2) or in non-specialised stores which have a predominance of these products (NACE Class 52.11). In this subchapter these activities are referred to as food retailing.

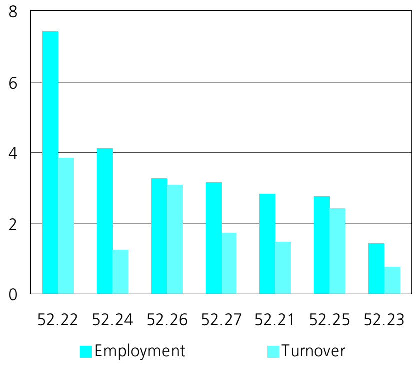
STRUCTURAL PROFILE

There were 707 000 food retailing enterprises in the EU [7], with an average turnover of EUR 968 200 per enterprise and average employment of 6.7 persons employed. The average turnover of the EU's [8] non-specialised food retailers (EUR 2.4 million per enterprise) who dominated this subsector was more than 10 times that of specialised food retailers. Collectively the 4.7 million persons employed in food retail enterprises added value of EUR 111.5 billion in 2000 [9], from turnover of EUR 708.4 billion.

The retail trade of food items is principally done through non-specialised food stores. Non-specialised food stores generated 85.4 % of turnover of food retailing in the EU [10] in 2000 and specialised food stores the remaining 14.6 %. Among the specialised food stores the largest activities in turnover terms were the retail sale of meat and meat products (NACE Class 52.22) and the retail sale of tobacco products (NACE 52.26). In employment terms the dominance of non-specialised food stores was less, accounting for 75.1 % of the EU total [11], and the importance of each of the different classes of specialised food retailers was higher, most notably the retail sale of bread, cakes and confectionery (NACE Class 52.24) which accounted for 4.1 % of the total, more than three times its turnover share. Figure 18.6 shows the share of food retailing by each of the activities of specialised food retailers.

[7] B, D and IRL, 1999; EL, not available.
[8] B, D and IRL, 1999; EL, not available.
[9] D and IRL, 1999; NL, 1998; EL, not available.
[10] D, 1999; EL, IRL, NL and FIN, not available.
[11] D, 1999; EL, IRL and FIN, not available.

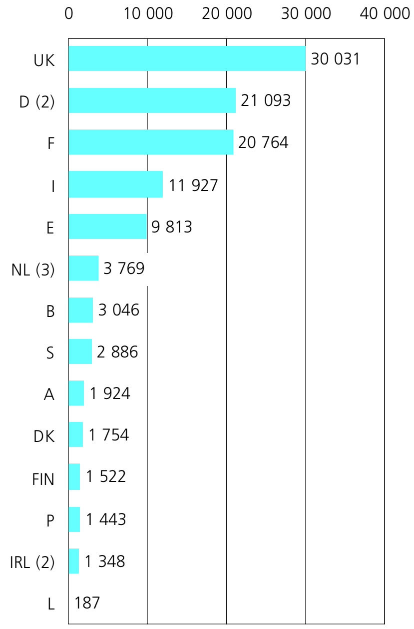
Figure 18.6
Shares of specialised stores in food retailing: ranked by employment share, EU, 2000 (%) (1)



(1) Turnover: D, 1999; EL, IRL, NL and FIN, not available. Employment: D, 1999; EL, IRL and FIN, not available; unspecialised food retailers (NACE Class 52.11) are not shown in the figure: they account for 85.4% of retail food turnover and 75.1% of employment.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

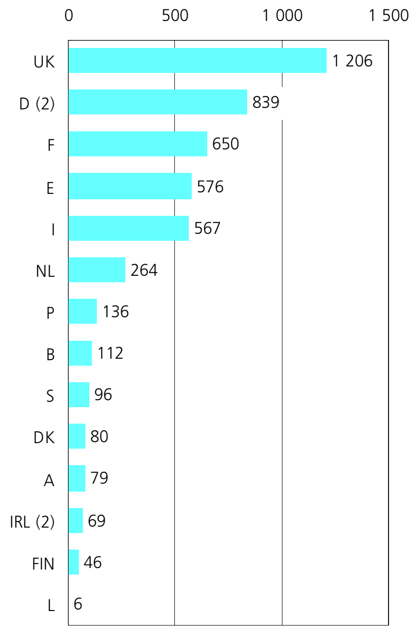
During the second half of the 1990s through to 2001 the EU's volume of food sales grew consistently year on year and by 2001 it was 16.6 % higher than in 1995 (see Figure 18.4 in the overview), an annual average growth rate of 2.6 %.

Figure 18.7
Retail sale of food beverages or tobacco (NACE Class 52.11 and Group 52.2) Value added, 2000 (million EUR) (1)



(1) EL, not available.
(2) 1999.
(3) 1998.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 18.8
Retail sale of food beverages or tobacco (NACE Class 52.11 and Group 52.2) Number of persons employed, 2000 (thousands) (1)



(1) EL, not available. (2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Table 18.2

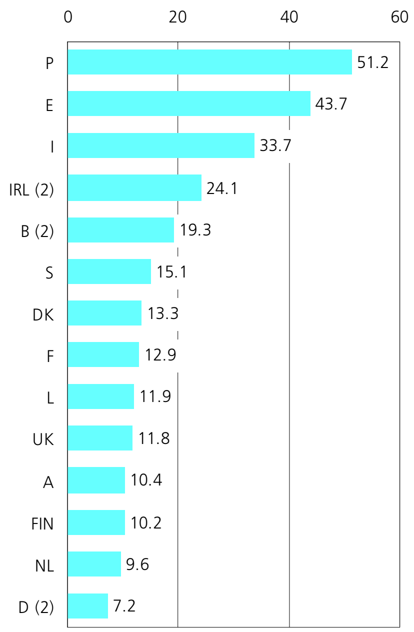
Retail sale of food beverages or tobacco (NACE Class 52.11 and Group 52.2)
Main indicators, growth rates (%)

	Turnover					Value added					Number of persons employed				
	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000
EU-15	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
B	12.2	-2.6	6.1	4.5	3.0	8.1	-4.6	6.5	2.2	1.1	9.3	-1.1	2.3	-0.1	0.7
DK	-3.6	2.1	39.4	1.7	3.6	0.0	7.6	35.5	2.2	-0.1	2.6	-18.5	44.1	-1.8	0.6
D	0.5	-0.7	-6.9	4.3	:	:	:	:	:	:	0.9	3.4	-7.9	3.4	:
EL	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
E	:	:	:	:	-3.1	:	:	:	:	-7.0	:	:	:	:	-2.1
F	:	2.5	3.4	4.3	6.8	:	3.0	5.4	4.8	6.6	:	2.9	0.8	3.3	4.9
IRL	6.1	11.1	:	:	:	8.3	25.7	:	:	:	-2.0	6.1	:	:	:
I	:	-1.0	15.2	3.2	4.7	:	-5.0	12.8	15.1	-5.0	:	-0.6	5.0	4.3	0.0
L	-0.1	3.5	6.3	7.6	3.8	-2.5	2.2	4.8	4.2	4.1	-0.6	-1.8	-3.4	15.4	-1.5
NL	-0.3	-0.2	2.8	:	:	-0.1	-2.9	4.1	:	:	1.8	2.2	2.8	:	:
A	:	:	2.6	2.9	5.3	:	:	12.7	1.6	1.4	:	:	5.1	1.7	-1.3
P	:	3.6	15.9	-9.1	8.9	:	9.7	13.0	0.0	8.4	:	6.7	14.2	-2.6	0.2
FIN	:	5.0	11.8	4.6	11.5	:	4.7	10.0	1.2	9.8	:	9.7	16.3	2.8	8.6
S	:	-1.5	-0.9	4.3	6.3	:	2.4	-0.8	4.0	8.9	:	:	-0.3	-2.4	2.1
UK	7.2	15.3	11.2	5.9	10.9	:	:	12.1	4.5	18.0	:	:	:	-1.2	0.4

Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 18.9

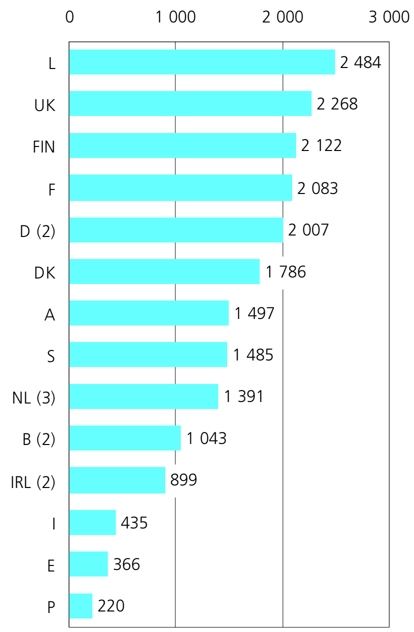
Retail sale of food beverages or tobacco (NACE Class 52.11 and Group 52.2) Enterprises per 10 000 inhabitants, 2000 (units) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms) and Demography (theme3/demo/dpop/ppavg).

Figure 18.10

Retail sale of food beverages or tobacco (NACE Class 52.11 and Group 52.2) Turnover per enterprise, 2000 (thousand EUR) (1)



(1) EL, not available.
(2) 1999.
(3) 1998.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

The largest food retailing subsectors in terms of the number of enterprises within the EU in 2000 were in Italy and Spain with 194 800 and 174 600 respectively, more than double the number of food retailers in each of the three other large Member States. Relative to the population in each country, Figure 18.9 shows that the density of food retail enterprises was even higher in Portugal. Consequently the average size of food retail enterprises in Italy, Spain and Portugal was low (see Figure 18.10). It should be noted that non-specialised food retailers generated a lower proportion of turnover in food retailing in Italy, Spain and Portugal, as well as Austria (all below 80 %) in 2000. As already noted non-specialised food retailers were generally significantly larger than specialised ones and this structural difference explains in part the lower average turnover of food retailers in the three southern Member States. Nevertheless, these three Member States had the smallest average sized enterprises in 2000 [12] in both the specialised and non-specialised parts of the food retail subsector.

(12) B, D and IRL, 1999; NL turnover and value added, 1998; EL, not available.

LABOUR AND PRODUCTIVITY

Apparent labour productivity in the retail food subsector was EUR 23 700 per person employed in 2000 [13]. Among the non-specialised food retailers, apparent labour productivity was slightly higher, EUR 25 600for the EU [14] and among specialised food retailers the EU [15] average was EUR 18 000. This difference can be explained to some extent by the different incidence of part-time employment between the two types of retail food activities. In 2000, 52.7 % of the EU's [16] workforce in non-specialised food retailers worked on a part-time basis, while the corresponding share for specialised food retailers was 45.9 %.

(13) D and IRL, 1999; NL, 1998; EL, not available.
(14) D and IRL, 1999; EL, not available.
(15) D and IRL, 1999; NL, 1998; EL, not available.
(16) D, 1999; EL, IRL, L and S, not available.

Comparing value added with personnel costs reduces the distortion due to the incidence of part-time employment. The wage adjusted labour productivity indicator (which is also adjusted to take account of the proportion of the self-employed and unpaid family workers) shows that value added exceeded personnel costs by 43.3 % in non-specialised food retailers [17] compared to a 23.5 % surplus in specialised food retailers [18].

(17) D, 1999; EL and IRL, not available.
(18) D, 1999; NL, 1998; EL and IRL, not available.

18.2: RETAIL TRADE OF NON-FOOD ITEMS IN NON-SPECIALISED STORES

This activity covers the retail sale in non-specialised stores which do not have a predominance of food, beverages or tobacco (NACE Class 52.12). In particular this activity includes department stores with a general line of merchandise. In this subchapter these activities are referred to as non-specialised non-food retail.

STRUCTURAL PROFILE

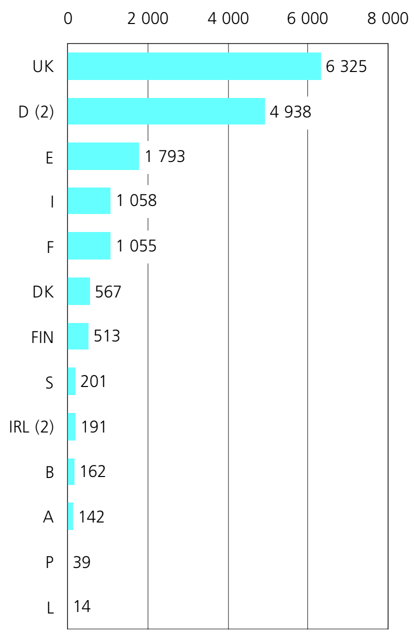
The EU's non-specialised non-food retail sector in 2000 was made up of 26 200 enterprises [19], employing 718 700 persons [20]. They recorded turnover of EUR 77.3 billion generating EUR 17.0 billion of value added [21]. In turnover terms the United Kingdom recorded the greatest activity in this subsector with close to 40 % of the EU total. As a percentage of non-food in-store retail turnover (NACE Class 52.12 and Groups 52.3, 52.4 and 52.5), non-specialised non-food retail was relatively important in Finland, Denmark and the United Kingdom, where it accounted for 26.2 %, 21.5 % and 16.7 % of the total. In no other country [22] did this subsector's share of non-food in-store retail turnover pass 15 % and in several Member States it was below 5 %, notably in Portugal where it was 1.7 %.

(19) B, D and IRL, 1999; EL not available.
(20) D and IRL, 1999; EL not available.
(21) Turnover and value added: D and IRL, 1999; EL and NL, not available.
(22) D and IRL, 1999; EL and NL, not available.

Figure 18.13 shows the average turnover of enterprises in this subsector. In Denmark the activity was concentrated in 24 enterprises with an average turnover considerably greater than in other countries. Nevertheless, in nearly all Member States the average size of enterprises in this subsector was high, and in Denmark, Germany (1999), Spain, Italy, Luxembourg and Finland these were the largest retail trade enterprises at the NACE class level in 2000.

Figure 18.11

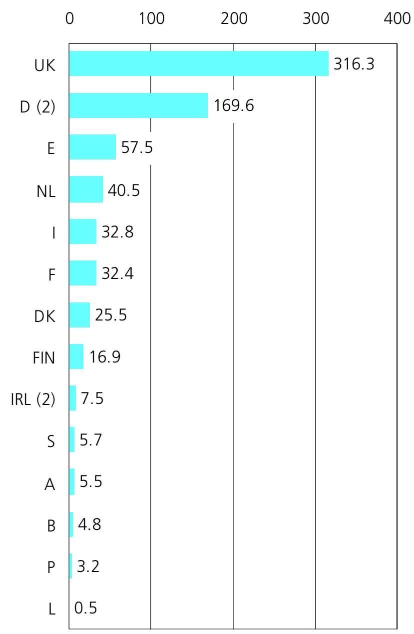
Other retail sale in non-specialized stores (NACE Class 52.12)
Value added, 2000 (million EUR) (1)



(1) EL and NL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 18.12

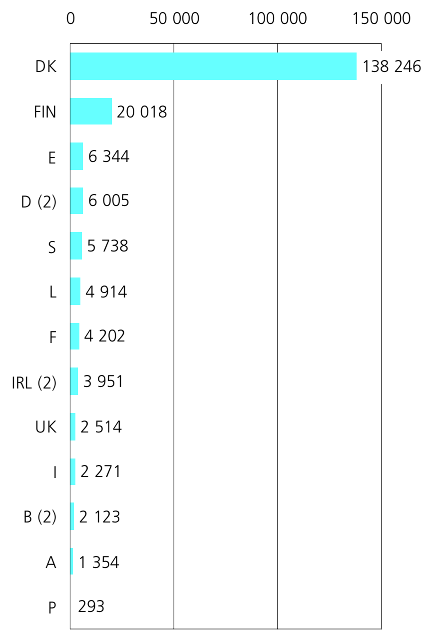
Other retail sale in non-specialized stores (NACE Class 52.12)
Number of persons employed, 2000 (thousands) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 18.13

Other retail sale in non-specialized stores (NACE Class 52.12)
Turnover per enterprise, 2000 (thousand EUR) (1)



(1) EL and NL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Table 18.3

Other retail sale in non-specialized stores (NACE Class 52.12)
Main indicators, growth rates (%)

	Turnover					Value added					Number of persons employed				
	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000
EU-15	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
B	-77.3	-10.0	4.4	0.8	-5.2	-75.9	-12.4	4.4	-3.3	1.1	-76.2	2.5	1.9	1.8	-17.3
DK	2.7	1.3	-47.9	4.2	11.1	1.7	6.4	-40.3	11.3	5.9	-2.7	21.4	-32.9	3.2	11.9
D	-3.1	-11.7	6.3	-7.0	:	:	:	:	:	:	-6.4	-8.3	-0.2	-7.1	:
EL	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
E	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
F	:	6.8	1.5	1.5	14.5	:	9.8	4.0	1.1	8.6	:	-1.7	-0.5	-2.7	19.7
IRL	13.4	44.3	:	:	:	24.3	41.7	:	:	:	28.5	19.6	:	:	:
I	5.9	9.8	-4.9	-27.1	8.7	-5.4	6.1	71.9	-45.7	3.6	-5.9	11.1	-12.2	-21.6	3.4
L	65.0	13.7	-15.1	52.7	-2.6	0.0	5.3	26.1	-3.3	-2.8	68.5	4.9	123.5	-48.8	-13.9
NL	:	:	:	:	:	:	:	:	:	:	0.0	-1.4	3.2	:	1.7
A	:	:	0.7	-10.3	-7.5	:	:	10.6	-14.2	-3.1	:	:	-3.6	-9.3	-8.1
P	:	13.3	-29.4	1.7	16.0	:	-9.0	-18.5	20.0	11.2	:	-15.3	-22.7	6.7	-0.7
FIN	6.3	-17.1	0.9	4.8	-8.6	-2.5	9.2	-4.1	4.8	-10.6	1.4	8.8	0.7	3.7	-5.6
S	10.1	8.2	21.5	13.1	23.1	13.2	0.4	16.5	18.8	16.0	:	:	-2.3	-0.3	10.4
UK	14.0	9.1	6.2	6.8	10.2	:	:	23.2	9.0	-3.4	:	:	:	2.6	-2.3

Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

18.3: RETAIL SALE OF PHARMACEUTICALS AND MEDICAL GOODS

This activity covers dispensing chemists, as well as specialised retailers of medical, orthopaedic, cosmetic and toilet articles (NACE Group 52.3).

STRUCTURAL PROFILE

This activity employed 850 600 persons in the EU [(23)] in 2000 and generated turnover [(24)] of EUR 125.7 billion. Nearly one third (32.4 %) of the employment in this subsector was in Germany. Dispensing chemists (NACE Class 52.31) accounted for two thirds (66.0 %) of the subsector's employment in 2000 [(25)], and the retail sale of cosmetic and toilet articles (NACE Class 52.33) just over one quarter (26.3 %). The retail of medical and orthopaedic goods (NACE Class 53.32) generally contributed between 1.2 and 6.3 % of employment, with Spain (11.7 %) and particularly the Netherlands (50.7 %) above this range.

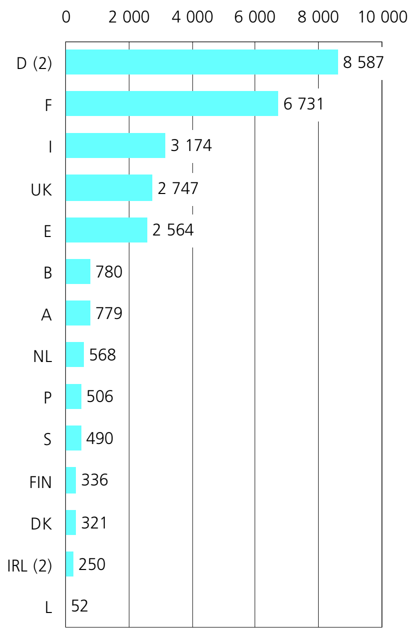
(23) IRL, 1999; EL, not available.
(24) IRL, 1999; EL, not available.
(25) D, 1999; EL and IRL, not available.

The average turnover of enterprises in this sector was relatively high in 2000 (see Figure 18.16), either the largest or second largest average size across the retail trade NACE groups in every Member State in 2000 [(26)], except for Ireland (1999). The high Swedish figure is boosted by the fact that in 2000 there were only two enterprises classified as dispensing chemists (NACE Class 52.31) that controlled all outlets in this activity, and hence the average turnover was very high. The average size of enterprises in the other two classes in Sweden was more in line with the other Member States.

(26) D and IRL, 1999; EL and NL, not available.

Figure 18.14

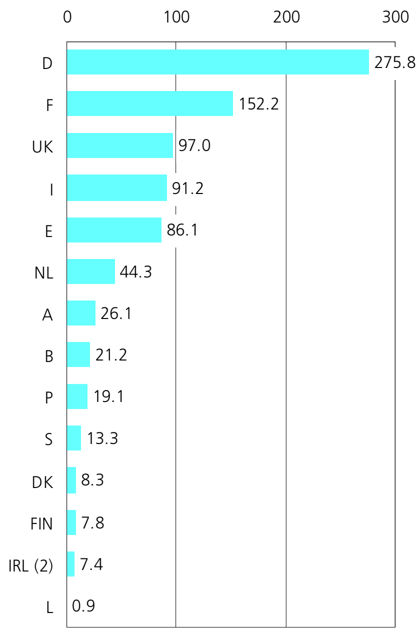
Retail sale of pharmaceuticals and medical goods, cosmetic and toilet articles (NACE Group 52.3)
Value added, 2000 (million EUR) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 18.15

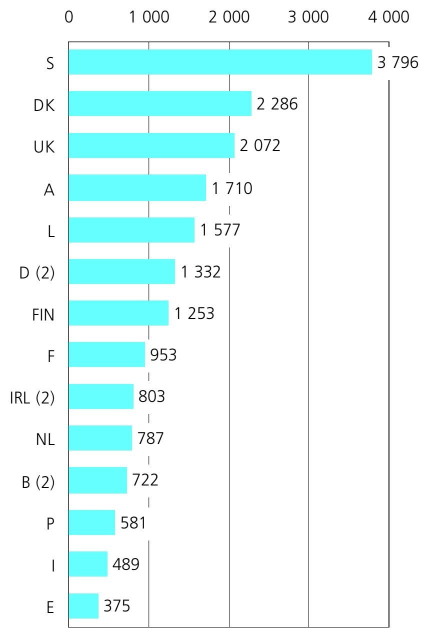
Retail sale of pharmaceuticals and medical goods, cosmetic and toilet articles (NACE Group 52.3)
Number of persons employed, 2000 (thousands) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 18.16

Retail sale of pharmaceutical and medical goods, cosmetic and toilet articles (NACE Group 52.3)
Turnover per enterprise, 2000 (thousand EUR) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Table 18.4

Retail sale of pharmaceuticals and medical goods, cosmetic and toilet articles (NACE Group 52.3)
Main indicators, growth rates (%)

	Turnover					Value added					Number of persons employed				
	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000
EU-15	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
B	-12.9	5.3	12.9	9.2	2.2	-23.2	-3.4	11.3	5.7	2.3	-9.7	5.7	0.8	10.3	0.3
DK	-6.2	3.0	7.4	6.0	6.1	-2.3	-1.8	9.8	3.4	6.5	0.4	3.9	-15.9	3.6	3.2
D	2.9	-0.5	4.6	7.6	6.0	:	:	:	:	:	3.0	1.2	4.8	-0.7	4.6
EL	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
E	:	:	:	:	4.1	:	:	:	:	5.2	:	:	:	:	-0.8
F	:	-0.9	5.9	6.1	7.1	:	-1.7	3.6	5.0	7.0	:	-0.1	6.5	-3.0	4.5
IRL	18.4	18.6	31.7	-1.9	:	21.8	13.5	31.3	10.1	:	14.0	5.3	23.4	-15.8	:
I	15.4	16.6	3.7	21.9	-12.9	28.9	16.5	0.1	1.6	-0.6	-3.6	6.6	0.3	-3.2	0.0
L	3.5	3.9	1.3	9.4	6.0	24.4	2.7	-15.1	27.2	6.0	4.1	3.5	2.8	2.7	1.9
NL	:	1.6	10.3	-51.4	8.0	:	-31.1	8.4	-51.7	5.6	3.4	7.2	4.2	:	9.5
A	:	:	6.9	2.2	10.4	:	:	1.1	8.9	-0.4	:	:	10.8	-5.0	14.0
P	:	4.0	-0.2	-1.2	13.9	:	6.4	-1.5	2.2	12.7	:	-5.8	-3.3	-8.7	11.1
FIN	3.3	7.3	2.9	8.4	7.2	-2.0	5.5	0.0	-1.7	10.5	2.4	4.9	4.3	-3.6	5.0
S	:	-8.4	5.7	13.4	11.5	:	15.7	-19.6	10.8	-3.0	:	:	0.0	1.2	1.2
UK	14.3	15.8	5.4	9.2	20.8	:	:	1.4	15.7	22.3	:	:	:	1.9	-9.0

Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

18.4: RETAIL SALE OF CLOTHING AND FOOTWEAR

These activities cover specialised retailers of textiles (NACE Class 52.41), clothing (NACE Class 52.42), footwear and leather goods (NACE Class 52.43). Retailers of second-hand articles are not included.

STRUCTURAL PROFILE

The retail sale of clothing and footwear through specialised stores generated turnover of EUR 165.2 billion in 2000 (27) in the EU. This was more than one fifth (21.5 %) of non-food in-store retail turnover (NACE Class 52.12 and Groups 52.3, 52.4 and 52.5) but was smaller than the turnover from retailing of household goods. Retailing of clothing and footwear employed 1.86 million persons, more than in the retailing of household goods.

This subsector is dominated by the retailing of clothes (NACE Class 52.42) which contributed 77.6 % of the subsector's EU (28) turnover in 2000. In every Member State the retailing of clothing contributed two thirds or more of the subsector's turnover.

(27) D and IRL, 1999; EL and NL, not available.
(28) D and IRL, 1999; EL and NL, not available.

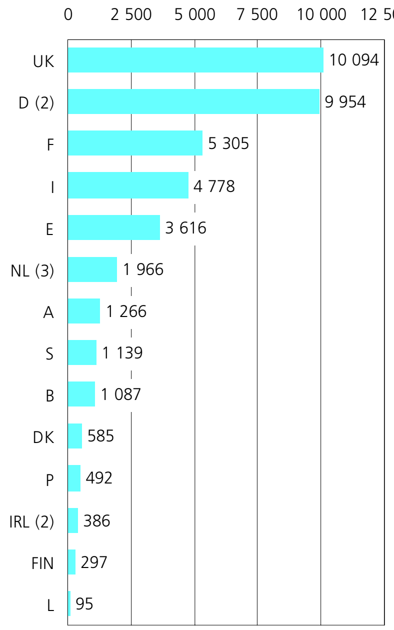
The United Kingdom had the largest clothing and footwear retail sector in 2000, contributing one quarter of the EU total. Relative to the total for non-food in-store retailing, Luxembourg, Italy and the United Kingdom reported a greater share of turnover from this subsector than the EU average.

Figure 18.19 shows the average turnover of enterprises in this subsector. The high value for the United Kingdom (EUR 2.1 million per enterprise) reflects the particularly high importance of large chains in retailing in this country. With this exception, however, the average size of enterprises in this subsector was quite low.

The EU's volume of clothing and footwear sales grew consistently year on year between 1995 and 2001, averaging 2.1 % per annum (see Figure 18.20). This was higher than the average for non-food retailing but lower than for the sector of retail trade as a whole.

Figure 18.17

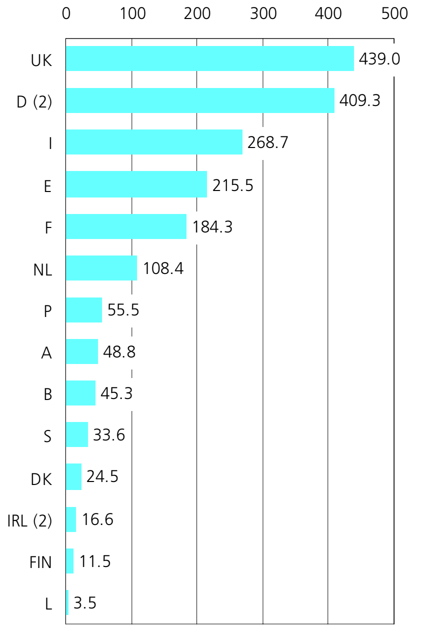
Retail sale of textiles, clothing, footwear and leather goods (NACE Classes 52.41, 52.42 and 52.43) Value added, 2000 (million EUR) (1)



(1) EL, not available.
(2) 1999.
(3) 1998.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 18.18

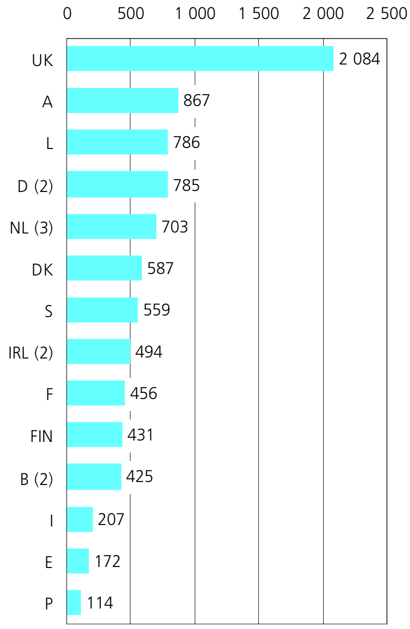
Retail sale of textiles, clothing, footwear and leather goods (NACE Classes 52.41, 52.42 and 52.43) Number of persons employed, 2000 (thousands) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 18.19

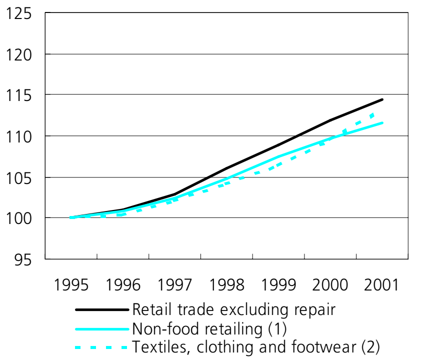
Retail sale of textiles, clothing, footwear and leather goods (NACE Classes 52.41, 52.42 and 52.43) Turnover per enterprise, 2000 (thousand EUR) (1)



(1) EL, not available.
(2) 1999.
(3) 1998.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 18.20

Index of the volume of sales, working day adjusted, EU (1995 =100)



(1) NACE Class 52.12 and Groups 52.3 to 52.6.
(2) NACE Classes 52.41, 52.42 and 52.43.
Source: Eurostat, European Business Trends (theme4/ebt/ebt_ts/retail).

Table 18.5

Retail sale of textiles, clothing, footwear and leather goods (NACE Classes 52.41, 52.42 and 52.43) Main indicators, growth rates (%)

	Turnover					Value added					Number of persons employed				
	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000
EU-15	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
B	4.1	-6.5	2.0	9.8	-3.3	-8.2	-4.2	8.7	9.3	2.0	1.3	-1.7	-0.8	4.8	-1.6
DK	0.2	1.2	7.7	4.9	0.4	-1.9	1.9	8.1	4.8	-5.5	0.2	5.1	-11.7	4.9	5.3
D	-3.1	-5.4	-2.9	0.0	:	:	:	:	:	:	-2.5	-4.1	-4.3	-3.9	:
EL	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
E	:	:	:	:	19.7	:	:	:	:	10.2	:	:	:	:	7.1
F	:	-0.5	3.7	2.4	4.4	:	0.9	4.2	5.1	5.8	:	-1.6	-2.1	-0.7	7.5
IRL	21.6	11.0	21.8	5.9	:	34.7	5.4	31.1	14.0	:	8.1	11.2	10.4	-5.8	:
I	-3.0	4.0	12.1	-8.3	10.7	18.1	-8.6	0.8	-1.1	11.2	-2.7	-0.5	3.8	1.7	-1.0
L	-2.0	4.8	3.5	1.5	2.1	9.7	-2.6	-1.1	0.8	2.1	0.4	-1.4	-5.0	6.0	-1.1
NL	1.7	1.4	4.8	:	:	0.8	1.3	7.5	:	:	3.2	-0.6	2.1	:	:
A	:	:	13.3	-5.7	3.0	:	:	10.3	-7.1	5.2	:	:	8.7	-5.9	-0.8
P	:	-5.9	38.4	-35.4	-1.5	:	5.5	27.6	-29.2	3.0	:	-2.3	18.5	-16.4	0.3
FIN	-1.5	3.2	5.0	4.8	4.8	-0.1	-3.8	9.1	0.0	4.8	-1.7	3.1	7.4	4.1	4.3
S	5.0	0.0	5.0	9.5	10.6	10.4	1.6	7.1	15.5	12.9	:	:	3.0	-1.0	1.9
UK	15.1	-0.1	1.3	6.0	11.4	:	:	-6.8	14.0	24.2	:	:	:	-4.4	2.6

Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

18.5: RETAIL SALE OF HOUSEHOLD GOODS

This subchapter includes retailers of furniture and lighting (NACE Class 52.44), electrical household equipment (NACE Class 52.45) and hardware (NACE Class 52.46).

STRUCTURAL PROFILE

Unsurprisingly, given the high unit value of many of the products retailed by this subsector, the retailing of household goods accounted for a larger proportion (27.7 %) of non-food in-store retail turnover than its share of employment (23.4 %) in the EU in 2000 [29]. The retail sale of household goods generated turnover [30] of EUR 228.3 billion from a workforce of 1.67 million persons.

(29) D and IRL, 1999; EL, not available; NL, not available for turnover.
(30) D and IRL, 1999; EL, not available.

The EU's volume of sales of household goods grew consistently year on year between 1995 and 2001, averaging 3.3 % per annum (see Figure 18.23). This was not only higher than the average for non-food retailing, but also higher than for food retailing.

In absolute terms, Germany had the largest subsector for the retailing of household goods, contributing 21.6 % of the EU's turnover [31]. This subsector accounted for at least 24 % of non-food in-store retail turnover in all Member States in 2000 [32], and was particularly important in Portugal where its share was 36.2 %.

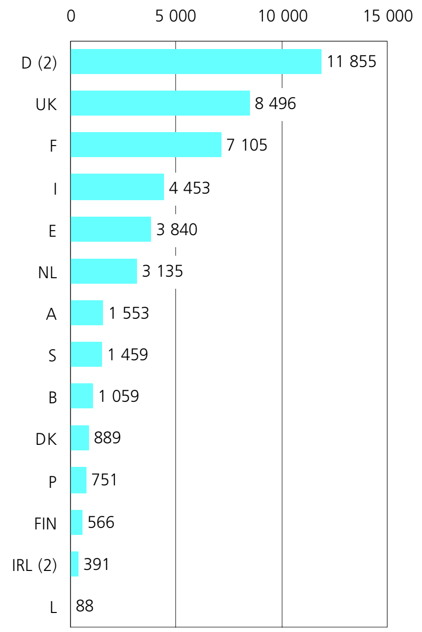
(31) D and IRL, 1999; EL, not available.
(32) D and IRL, 1999; EL and NL, not available.

The three NACE classes that make up this subsector all contributed significantly to total turnover. The largest in 2000 [33] was the retailing of furniture and lighting (NACE Class 52.44) with 37.3 % and the smallest was the retailing of electrical household equipment (NACE Class 52.45) with 29.7 %. Only in Luxembourg and the United Kingdom was the retailing of electrical household equipment the largest NACE class in this subsector.

(33) D and IRL, 1999; EL, not available.

Figure 18.21

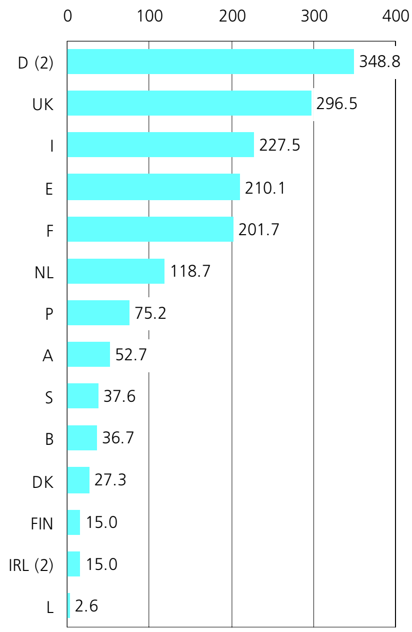
Retail sale of household equipment (NACE Classes 52.44, 52.45 and 52.46) Value added, 2000 (million EUR) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 18.22

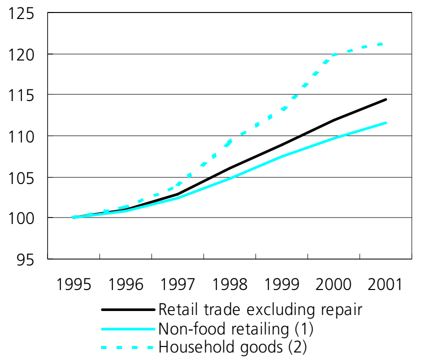
Retail sale of household equipment (NACE Classes 52.44, 52.45 and 52.46) Number of persons employed, 2000 (thousands) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 18.23

Index of the volume of sales, working day adjusted, EU (1995 =100)



(1) NACE Class 52.12 and Groups 52.3 to 52.6.
(2) NACE Classes 52.44, 52.45 and 52.46.
Source: Eurostat, European Business Trends (theme4/ebt/ebt_ts/retail).

Table 18.6

Retail sale of household equipment (NACE Classes 52.44, 52.45 and 52.46)
Main indicators, growth rates (%)

	Turnover					Value added					Number of persons employed				
	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000
EU-15	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
B	6.6	-7.4	9.8	3.9	1.7	3.0	-7.6	8.8	2.7	3.6	8.8	0.8	5.7	-0.4	-3.2
DK	5.9	-3.4	6.0	5.5	2.4	2.3	-3.6	9.2	2.3	-2.6	2.7	8.8	-12.4	2.0	5.4
D	-2.7	-4.1	0.2	0.4	:	:	:	:	:	:	-1.4	0.0	-3.8	-4.8	:
EL	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
E	:	:	:	:	11.3	:	:	:	:	14.8	:	:	:	:	2.0
F	:	0.5	5.2	0.9	12.7	:	1.3	7.1	0.6	14.8	:	1.5	1.7	-2.6	10.2
IRL	14.0	24.8	21.3	3.2	:	31.9	18.2	16.2	15.6	:	3.1	13.3	13.8	-4.2	:
I	-4.3	20.2	7.9	12.6	-8.6	5.7	24.6	-5.6	9.8	0.6	-6.1	5.6	5.6	2.9	1.0
L	-5.1	9.6	3.1	10.9	3.3	-1.3	2.7	4.5	3.1	3.2	-2.7	1.4	-2.7	6.3	-2.4
NL	2.8	3.4	10.4	7.0	8.5	2.5	1.4	10.3	7.6	11.2	4.0	7.0	2.6	:	:
A	:	:	7.4	4.3	1.8	:	:	8.7	-0.1	4.0	:	:	3.7	1.7	0.7
P	:	21.3	0.6	-22.8	6.0	:	28.9	4.9	-19.6	-1.8	:	15.5	0.5	-19.7	4.6
FIN	7.4	9.2	12.1	7.7	26.0	8.5	7.1	19.3	-1.2	26.3	7.4	4.0	11.9	0.3	19.3
S	11.5	-2.0	9.5	12.9	16.4	26.2	-7.7	11.0	9.9	21.3	:	:	9.8	0.7	5.1
UK	6.3	17.6	8.0	9.7	16.3	:	:	15.4	14.9	11.6	:	:	:	2.6	4.9

Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

18.6: OTHER RETAIL SALE IN SPECIALISED STORES, INCLUDING SECOND-HAND GOODS

This residual category of other in-store specialised retailers covers three areas: retailers of books, newspapers and stationery (NACE Class 52.47); other specialised retailers (NACE Class 52.48); and retailers of second-hand goods (NACE Group 52.5).

Within the EU the retail sale of books, newspapers and stationery accounted for approximately 4.2 % of the turnover of non-food in-store retailing in 2000 (34), other specialised retailing accounted for 20.0 % and the retailing of second-hand goods accounted for 0.9 %.

STRUCTURAL PROFILE

The retail sale of books, newspapers and stationery generated EUR 33.7 billion of turnover in 2000 (35) and employed 353 600 persons. The United Kingdom generated the highest turnover in this activity in the EU in 2000 (EUR 8.0 billion), with France, Germany (1999) and Italy recording turnover between EUR 5.0 billion and EUR 5.3 billion each.

(34) D and IRL, 1999; EL and NL, not available.
(35) D and IRL, 1999; EL, not available.

The category of other specialised retailers covers a wide range of specialists including retailers of sports goods, toys, photographic equipment, computers, watches and other personal effects, as well as fuel (other than automotive fuel). Turnover in the EU (36) in 2000 was EUR 162.3 billion, comparable in size with the turnover of retailing of clothes and footwear. Employment reached 1.6 million persons, only 66 000 less than in the retailing of household goods. Germany's share of this turnover total for the EU was 13.8 %, relatively low compared to other retail trade activities; both the United Kingdom (22.3 %) and France (17.4 %) generated a larger proportion of the EU's turnover and Italy (13.2 %) recorded a level of activity that was only slightly below that of Germany. A short time-series (1997 to 2000) of turnover data (in current prices) is available for 12 of the Member States (37) and this shows annual average growth of 8.1 %. Only Luxembourg and Portugal recorded a fall in turnover over this period.

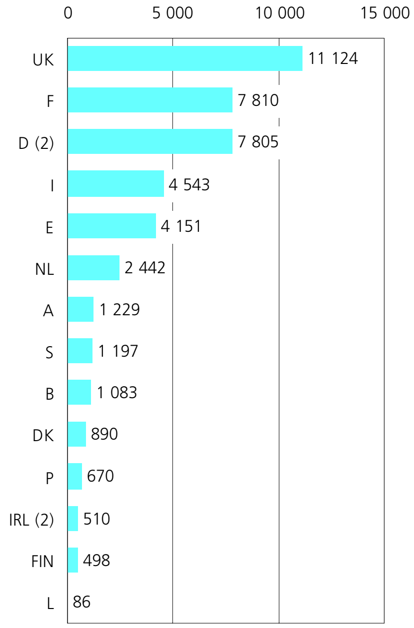
(36) D and IRL, 1999; EL, not available.
(37) D, EL and IRL, not available.

Second-hand retailers include retailers of antiques, second-hand books, clothes and other personal or household items. EU turnover in 2000 was EUR 7.0 billion (38) and 76 100 persons (39) were employed in this activity. Two countries, the United Kingdom and France, dominated this activity within the EU. The United Kingdom accounted for 47.4 % of the EU's turnover total and France 28.8 %; Germany (8.5 %) was the only other country to contribute more than 3.5 % of the total. Enterprises in this activity were generally very small and in the majority of Member States they had the lowest average turnover of any in-store retail NACE class, the main exception being the United Kingdom.

(38) IRL, 1999; EL and NL, not available.
(39) IRL, 1999; EL, not available.

Figure 18.24

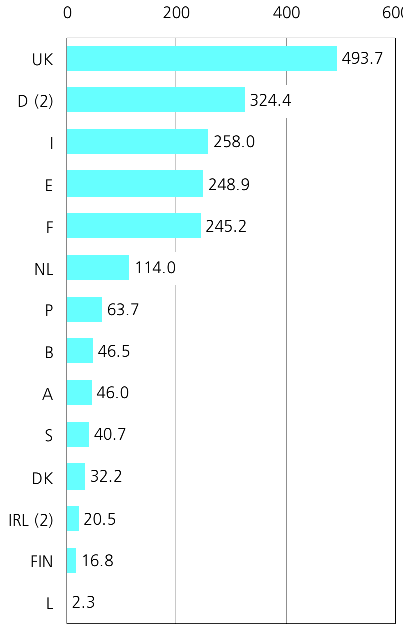
Retail of books, newspapers and other (NACE Classes 52.47 and 52.48) Value added, 2000 (million EUR) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 18.25

Retail of books, newspapers and other (NACE Classes 52.47 and 52.48) Number of persons employed, 2000 (thousands) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Table 18.7

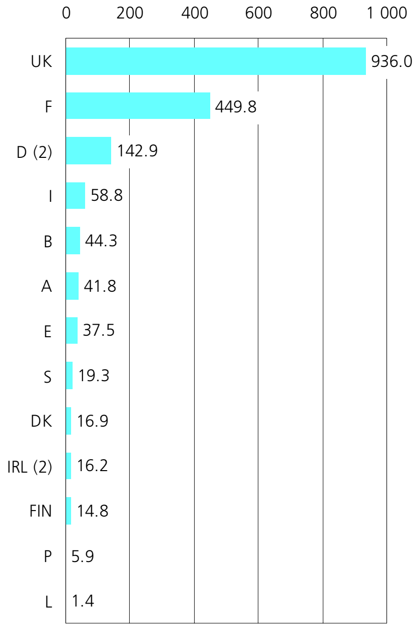
Retail of books, newspapers and other (NACE Classes 52.47 and 52.48) Main indicators, growth rates (%)

	Turnover					Value added					Number of persons employed				
	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000
EU-15	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
B	-1.0	-4.2	7.3	6.5	6.1	-22.2	-1.9	5.1	11.1	0.6	-11.2	0.1	8.1	-0.4	-3.3
DK	5.7	2.6	8.9	3.6	9.5	3.7	1.1	10.6	-4.2	9.9	6.6	6.9	-12.0	4.2	6.0
D	-1.3	-5.3	-1.8	-1.0	:	:	:	:	:	:	-2.3	-3.3	-2.1	-3.7	:
EL	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
E	:	:	:	:	16.3	:	:	:	:	8.4	:	:	:	:	0.1
F	:	4.7	3.5	11.5	5.7	:	2.6	5.0	15.2	3.1	:	2.3	1.5	7.5	5.6
IRL	13.7	25.2	12.5	20.5	:	22.9	30.5	8.3	36.6	:	4.5	13.3	13.7	-3.3	:
I	-5.1	35.5	-5.9	8.8	-0.6	0.2	8.4	19.6	-5.1	-11.7	1.1	2.9	7.2	2.4	1.0
L	8.6	4.1	5.9	2.0	-20.7	23.3	-1.8	-0.7	2.4	-15.3	6.7	2.9	-1.2	0.2	-27.6
NL	3.5	5.1	5.2	7.0	7.6	3.7	3.4	5.5	6.1	11.7	13.1	-1.7	5.3	1.8	18.9
A	:	:	5.2	7.2	5.6	:	:	6.3	5.8	0.3	:	:	1.8	0.0	1.4
P	:	-3.7	27.5	-43.0	11.1	:	8.5	49.6	-46.0	-0.1	:	1.2	10.9	-23.8	1.5
FIN	6.4	8.4	9.6	6.6	-2.1	5.9	4.3	14.5	-0.6	1.8	4.0	8.3	9.7	5.4	-2.3
S	7.1	-0.4	6.2	6.2	15.6	9.5	1.6	6.4	6.6	14.2	:	:	4.9	-1.7	2.8
UK	-0.6	26.2	12.1	8.4	16.9	:	:	13.0	15.1	16.9	:	:	:	2.1	7.6

Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 18.26

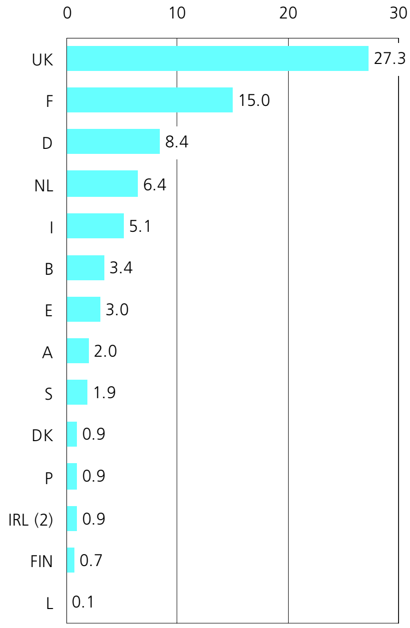
Retail sale of second-hand goods in stores (NACE Group 52.5)
Value added, 2000 (million EUR) (1)



(1) EL and NL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 18.27

Retail sale of second-hand goods in stores (NACE Group 52.5)
Number of persons employed, 2000 (thousands) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Table 18.8

Retail sale of second-hand goods in stores (NACE Group 52.5)
Main indicators, growth rates (%)

	Turnover					Value added					Number of persons employed				
	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000
EU-15	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
B	-31.5	18.7	19.3	2.8	4.8	-20.5	85.0	-71.9	135.3	23.1	-16.4	-0.3	-1.5	9.7	13.2
DK	12.4	-4.0	8.8	-13.2	4.7	15.8	-7.8	7.4	-18.2	1.8	5.6	9.4	-8.2	-29.9	2.1
D	-5.6	-2.1	7.4	-4.8	40.4	:	:	:	:	:	-8.3	-11.7	5.6	-9.2	28.9
EL	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
E	:	:	:	:	0.9	:	:	:	:	9.6	:	:	:	:	-10.7
F	:	11.9	10.8	14.2	18.4	:	16.8	7.8	21.8	21.6	:	6.9	2.1	4.6	10.2
IRL	-65.9	265.6	:	:	:	-59.6	235.0	:	:	:	-32.9	61.3	:	:	:
I	-0.1	10.8	43.5	-3.0	-23.7	5.5	31.3	-5.0	9.7	-25.8	-4.8	12.4	3.8	9.9	-0.8
L	6.5	2.0	-10.0	-11.1	10.0	50.0	-5.6	-35.3	18.2	7.7	10.3	-1.6	0.0	1.7	-10.2
NL	:	:	:	:	:	:	:	:	:	:	57.9	-19.0	37.3	-29.5	37.7
A	:	:	4.9	8.5	2.6	:	:	8.1	3.5	8.6	:	:	-3.4	8.1	3.0
P	:	-1.6	-15.3	-23.2	-2.9	:	29.9	-15.0	-8.2	-24.4	:	15.9	-17.2	-14.4	-3.2
FIN	3.1	14.6	2.0	11.6	10.4	-1.1	11.5	17.5	2.6	26.5	5.3	16.3	14.6	-1.1	-3.1
S	33.1	22.8	-50.5	1.1	19.4	24.7	15.5	-52.3	10.5	14.2	:	:	-9.1	1.2	4.7
UK	15.8	23.9	24.4	2.4	13.6	:	:	17.0	4.0	29.5	:	:	:	6.3	4.8

Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

18.7: RETAIL SALE NOT IN STORES

These activities cover retail sales via stalls, markets and door-to-door, remote retail sales via mail order, mobile sales as well as sales from vending machines. These are classified in NACE Group 52.6.

Remote-selling, covers a diverse range of direct selling trading forms such as mail-order catalogues and television, radio and Internet sales, which may be the main trading form for an enterprise or a complement to in-store retailing. Note that in SBS enterprises are classified according to their largest activity and hence enterprises that principally trade through stores but also use remote-selling are not covered in this subchapter.

STRUCTURAL PROFILE

Retail sale not in stores generated 5.1 % of retail trade turnover in 2000 [40] and provided employment for 6.8 % of the retail trade workforce. The level of employment in 2000 [41] was 695 400 persons and turnover was EUR 86.2 billion. Turnover in the EU [42] increased by an average of 4.1% per annum between 1996 and 2000 in current price terms.

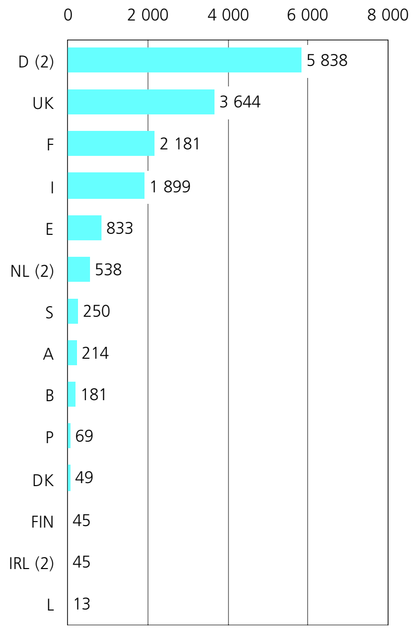
Retail sale via mail order houses (NACE Class 52.61) generated more than half (54.7 %) of the subsector's turnover in 2000 [43], retail sale via stalls and markets (NACE Class 52.62) was the smallest part of the subsector with 17.4 % of the total and other non-store retail sale (NACE Class 52.63) accounted for the remaining 27.9 %. However, these averages across EU Member States hide very different structures of this subsector between countries. In the southern Member States retail sale via stalls and markets was the most important activity, reaching close to half of the turnover in the subsector. In Austria, the Nordic Member States and the United Kingdom retail sale via mail order houses generated more than two thirds of the subsectors' turnover; in Italy by comparison it was less than 10 %. Other non-store retail sale accounted for one third or more of total non-store retail turnover only in Germany (33.3 %), Italy (41.1 %) and Luxembourg (86.1 %).

Figure 18.30 shows the average turnover per enterprise in this subsector. This is strongly related to the importance of retail sale via stalls and markets in each country: those countries where this type of retailing had a low importance had higher average turnover per enterprise, and those where this type of retailing was widespread had a low average turnover.

(40) D and IRL, 1999; EL, not available.
(41) IRL, 1999; EL, not available.
(42) A, 1995 to 2000; EL and E, not available.
(43) D and NL, 1999; EL, IRL and L, not available.

Figure 18.28

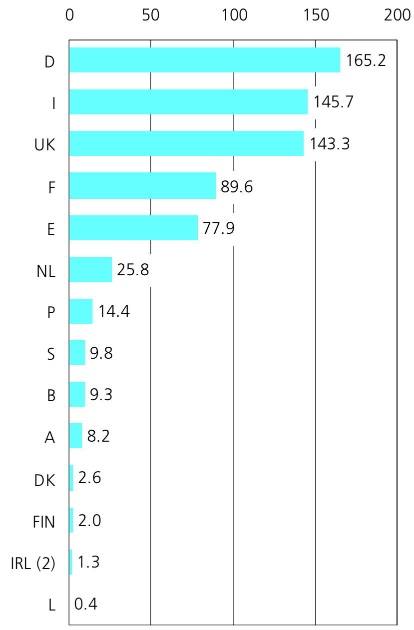
Retail sale not in stores
(NACE Group 52.6)
Value added, 2000 (million EUR) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 18.29

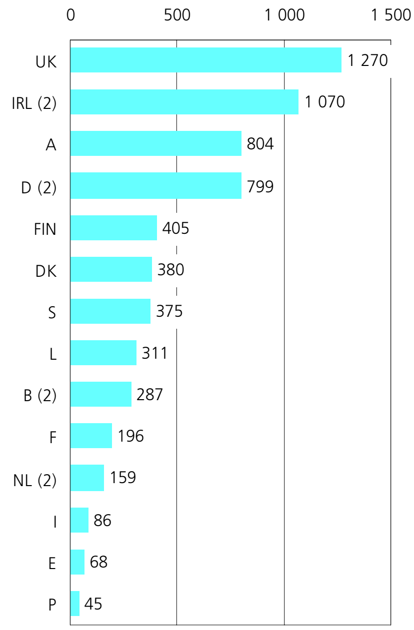
Retail sale not in stores
(NACE Group 52.6)
Number of persons employed, 2000 (thousands) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 18.30

Retail sale not in stores
(NACE Group 52.6)
Turnover per enterprise, 2000 (thousand EUR) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Table 18.9

Retail sale not in stores (NACE Group 52.6)
Main indicators, growth rates (%)

	Turnover					Value added					Number of persons employed				
	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000
EU-15	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
B	10.2	-14.5	24.9	5.4	-7.9	-4.2	-18.5	22.2	9.2	-10.7	18.6	-15.0	8.9	-2.7	-3.8
DK	17.6	26.2	22.9	-10.9	7.9	11.3	32.0	17.2	-33.8	33.7	23.6	48.7	5.9	-13.8	-1.4
D	-0.1	-4.9	-7.2	-3.0	10.7	:	:	:	:	:	-6.6	-5.5	-9.4	-5.7	-2.6
EL	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
E	:	:	:	:	-16.3	:	:	:	:	-10.5	:	:	:	:	3.7
F	:	-0.1	3.4	8.0	7.2	:	-1.3	1.9	1.3	4.0	:	-0.6	-2.2	2.0	5.2
IRL	55.2	30.4	:	:	:	49.4	12.3	:	:	:	264.8	8.1	:	:	:
I	:	-1.9	27.6	-15.3	6.5	:	11.8	15.5	-5.7	8.9	:	0.6	4.6	3.4	-0.4
L	3.6	-0.9	-2.1	0.5	-2.0	31.3	0.0	-23.1	31.0	-3.1	9.8	1.5	-0.7	0.2	-5.0
NL	-3.5	5.5	-2.0	-9.8	-1.0	-4.7	11.3	-4.6	-13.2	:	42.2	-9.2	-7.1	0.8	2.5
A	:	:	-2.6	19.5	5.9	:	:	-13.3	1.6	-5.4	:	:	-5.9	0.5	17.1
P	:	-8.6	2.8	6.5	9.8	:	12.7	-12.2	23.7	-1.2	:	-12.1	0.0	52.6	2.1
FIN	15.2	4.1	-3.3	2.2	7.7	13.0	1.4	-7.3	1.3	-14.3	4.7	20.7	15.0	3.5	10.4
S	13.3	15.8	7.9	9.8	18.8	11.4	-0.6	17.1	-1.3	22.3	:	:	6.5	5.5	10.3
UK	10.6	11.7	8.3	12.2	19.1	:	:	33.3	-3.1	0.8	:	:	:	13.9	17.3

Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

18.8: REPAIR OF PERSONAL AND HOUSEHOLD GOODS

The repair of personal and household goods is quite different from the other activities covered in this subchapter as it does not involve buying and reselling of goods, but in fact covers the provision of repair services. This activity (Group 52.7) covers specialist repairers only, and excludes enterprises that carry out repair in combination with another distribution or manufacturing activity.

STRUCTURAL PROFILE

This subsector was the smallest in the EU's retail trade (including repair) sector. It employed 197 200 persons and generated EUR 3.9 billion of value added in 2000 [44]. This represented 1.3 % of the value added by the retail trade (including repair) sector in 2000 and 1.5 % of the employment total.

[44] D and IRL, 1999; EL, not available.

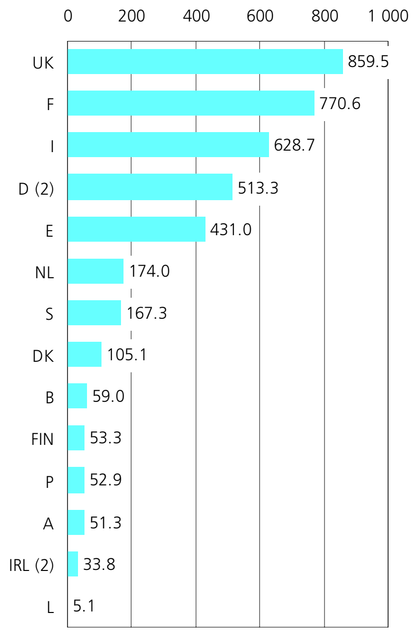
The repair of electrical household goods (NACE Class 52.72) was the largest repair activity in 2000 [45], generating nearly half (49.0 %) of value added in this subsector. The repair of watches, clocks and jewellery (NACE Class 52.73) and the repair of boots, shoes and other articles of leather (NACE Class 52.71) were the smallest activities accounting for 4.5 % and 13.3 % of the subsector's total. In nearly all countries these two classes were the smallest parts of this subsector and the only exception was in the Netherlands where the repair of boots, shoes and other articles of leather accounted for more than one third of value added.

The average size of enterprises in this subsector was 2.1 persons employed in 2000 [46] and in every Member State the average enterprise size in this subsector was smaller than the average for retail trade (including repair).

[45] D, 1999; B, EL, IRL, L, not available.
[46] B, D and IRL, 1999; EL, not available.

Figure 18.31

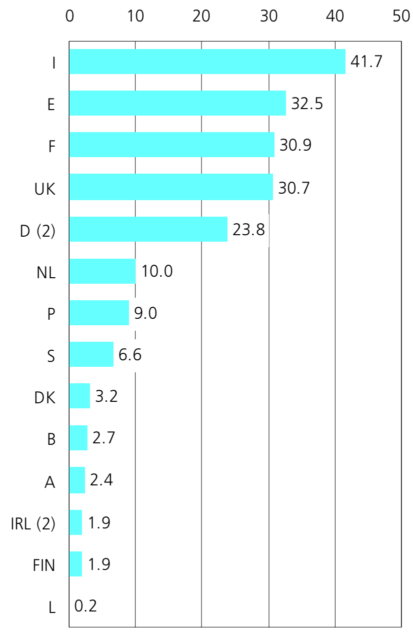
Repair of personal and household goods (NACE Group 52.7)
Value added, 2000 (million EUR) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 18.3

Repair of personal and household goods (NACE Group 52.7)
Number of persons employed, 2000 (thousands) (1)



(1) EL, not available.
(2) 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Table 18.10

Repair of personal and household goods (NACE Group 52.7)
Main indicators, growth rates (%)

	Turnover					Value added					Number of persons employed				
	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000
EU-15	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
B	:	-18.4	-0.7	-7.8	14.3	:	-7.3	-3.3	-8.5	9.9	:	-22.3	-1.7	9.6	-16.6
DK	6.7	-2.9	2.6	-4.4	13.0	6.3	-4.7	-0.3	6.3	2.6	3.7	14.6	-20.8	-5.6	-1.2
D	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
EL	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
E	:	:	:	:	17.7	:	:	:	:	16.8	:	:	:	:	10.2
F	:	-1.8	4.3	2.5	8.2	:	-2.1	4.8	1.9	5.9	:	-1.4	-1.8	-1.2	5.0
IRL	-11.7	28.3	27.2	19.5	:	-1.6	32.3	17.5	17.0	:	6.7	1.1	17.4	8.1	:
I	:	19.4	5.2	-9.3	6.8	:	5.3	4.0	7.7	14.3	:	-2.9	2.2	2.9	0.1
L	-3.4	-5.8	8.6	3.4	6.6	-14.9	7.5	48.8	-25.0	6.3	4.9	-0.5	6.6	9.1	0.0
NL	:	:	:	:	21.3	:	:	:	:	23.3	47.7	-13.4	-19.0	-0.9	71.1
A	:	:	-11.6	9.9	1.7	:	:	-19.0	16.1	-8.9	:	:	-5.2	-1.1	-9.6
P	:	-8.4	-16.4	-17.0	4.0	:	-19.4	-1.6	-26.6	18.9	:	-6.5	-7.4	-14.5	0.4
FIN	-2.8	11.6	0.1	1.0	-2.0	-2.5	4.1	8.4	-4.7	6.2	3.7	14.9	-0.5	-2.8	-4.6
S	15.8	18.9	-13.2	-3.4	14.9	16.5	-1.2	4.9	-5.8	11.2	:	:	3.7	-5.5	4.2
UK	-9.5	49.2	32.0	23.8	22.8	:	:	-7.9	54.6	30.6	:	:	:	4.2	25.2

Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Table 18.11

Retail trade, except of motor vehicles, motorcycles; repair of personal and household goods (NACE Division 52)
Main indicators, 2000

	B	DK	D (1)	EL	E	F	IRL (1)	I	L	NL	A	P	FIN	S	UK
Number of enterprises (units) (2)	81 505	25 259	284 520	:	530 844	378 896	23 275	741 360	2 832	85 730	35 041	150 539	23 615	57 427	215 372
Turnover (million EUR)	48 449	28 657	313 626	:	141 367	299 370	16 371	203 410	2 990	68 840	36 562	27 825	23 420	44 471	356 969
Number of persons employed (thousands)	281	205	2 555	:	1 508	1 601	140	1 637	17	727	271	377	119	245	3 050
Value added (million EUR)	7 501	5 177	70 726	:	27 078	52 171	3 171	32 519	542	14 301	7 199	4 028	3 846	7 807	74 257
Purchases of goods and services (million EUR)	41 074	23 908	231 217	:	116 353	247 479	13 388	175 715	2 436	54 546	29 393	24 803	19 939	37 382	277 524
Personnel costs (million EUR)	4 264	3 688	44 321	:	14 511	35 088	:	14 746	331	8 344	5 081	2 569	2 510	5 988	43 807
Gross investment in tangible goods (million EUR)	1 582	981	5 148	:	4 753	7 480	447	4 805	:	1 928	867	1 069	547	1 073	13 570
App. labour productivity (thous. EUR/pers. emp.)	26.7	25.3	27.7	:	18.0	32.6	22.7	19.9	32.2	19.7	26.6	10.7	32.3	31.9	24.3
Wage adjusted labour productivity (%)	119.8	125.2	146.5	:	122.9	131.7	:	90.9	142.3	147.6	123.8	103.1	138.8	111.9	156.1
Gross operating rate (%)	6.7	5.2	8.3	:	8.9	5.7	:	8.7	7.0	8.7	5.8	5.2	5.7	4.1	8.5

(1) 1999.
(2) B, 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Table 18.12

Retail trade, except of motor vehicles, motorcycles; repair of personal and household goods (NACE Division 52)
Main indicators, 2000

	BG	CY (1)	CZ	EE	HU (1)	LV	LT	MT	PL	RO (1)	SK	SI (2)	TR
Number of enterprises (units)	93 196	:	145 233	5 038	6 400	12 569	14 906	:	450 829	157 444	3 945	12 322	:
Turnover (million EUR)	1 968	2 645	17 341	1 705	5 810	2 180	2 527	:	42 406	8 031	2 929	4 174	:
Number of persons employed (thousands) (3)	204	27	417	42	127	84	98	:	1 154	661	59	:	:
Value added (million EUR)	196	439	1 763	206	622	251	285	:	6 174	877	295	539	:
Purchases of goods and services (million EUR)	1 870	2 042	15 737	1 547	5 287	2 021	2 297	:	36 607	7 609	2 617	3 554	:
Personnel costs (million EUR)	108	255	1 141	131	428	158	209	:	2 740	457	226	450	:
Gross investment in tangible goods (million EUR)	60	79	581	70	:	93	78	:	1 204	395	232	153	:
App. labour productivity (thous. EUR/pers. emp.) (3)	1.0	16.6	4.2	4.9	4.9	3.0	2.9	:	3.7	1.3	5.0	:	:
Wage adjusted labour productivity (%) (3)	86.0	128.1	101.3	150.8	142.3	157.1	121.6	:	134.6	132.0	128.7	:	:
Gross operating rate (%)	4.4	7.0	3.6	4.4	3.3	4.3	3.0	:	8.1	4.5	2.4	2.1	:

(1) 1998.
(2) 1999.
(3) PL, 1998.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_cc).

Table 18.13

Retail sale of food beverages or tobacco (NACE Class 52.11 and Group 52.2)
Main indicators, 2000

	B	DK	D (1)	EL	E	F	IRL (1)	I	L	NL (2)	A	P	FIN	S	UK
Number of enterprises (units) (3)	19 766	7 085	59 105	:	174 609	76 174	9 044	194 866	522	15 305	8 449	52 397	5 305	13 407	70 583
Turnover (million EUR)	21 243	12 655	118 603	:	63 877	158 689	8 127	84 859	1 297	23 619	12 650	11 522	11 256	19 906	160 095
Number of persons employed (thousands)	112	80	839	:	576	650	69	567	6	264	79	136	46	96	1 206
Value added (million EUR)	3 046	1 754	21 093	:	9 813	20 764	1 348	11 927	187	3 769	1 924	1 443	1 522	2 886	30 031
Purchases of goods and services (million EUR)	18 216	10 977	94 444	:	55 344	137 494	6 843	74 779	1 102	19 854	10 701	10 785	9 852	17 333	127 896
Personnel costs (million EUR)	2 010	1 278	13 573	:	5 369	13 850	:	6 609	119	2 312	1 389	858	978	2 325	16 585
Gross investment in tangible goods (million EUR)	472	606	1 614	:	1 816	3 220	236	2 186	:	575	266	526	254	466	6 031
App. labour productivity (thous. EUR/pers. emp.)	27.3	21.8	25.1	:	17.0	32.0	19.6	21.0	30.0	15.0	24.3	10.6	32.8	30.2	24.9
Wage adjusted labour productivity (%)	119.2	126.0	146.4	:	125.8	139.1	:	94.0	144.9	150.4	124.4	105.9	146.0	114.3	168.3
Gross operating rate (%)	4.9	3.8	6.2	:	7.0	4.4	:	6.3	5.3	6.2	4.2	5.1	4.8	2.8	8.4

(1) 1999.
(2) All except number of enterprises, persons employed and investment, 1998.
(3) B, 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Table 18.14

Other retail sale in non-specialized stores (NACE Class 52.12)
Main indicators, 2000

	B	DK	D (1)	EL	E	F	IRL (1)	I	L	NL	A	P	FIN	S	UK
Number of enterprises (units) (2)	444	24	3 184	:	1 104	1 275	215	2 612	29	215	502	894	153	186	11 787
Turnover (million EUR)	894	3 318	19 121	:	7 003	5 358	850	5 932	143	:	680	262	3 063	1 067	29 634
Number of persons employed (thousands)	5	26	170	:	57	32	8	33	0	41	6	3	17	6	316
Value added (million EUR)	162	567	4 938	:	1 793	1 055	191	1 058	14	:	142	39	513	201	6 325
Purchases of goods and services (million EUR)	727	2 834	13 787	:	5 424	4 264	663	5 299	128	:	531	245	2 598	868	23 071
Personnel costs (million EUR)	117	468	4 088	:	1 250	792	:	741	10	:	112	24	381	152	4 382
Gross investment in tangible goods (million EUR)	19	68	550	:	470	134	30	258	:	112	11	11	93	22	1 379
App. labour productivity (thous. EUR/pers. emp.)	34.0	22.2	29.1	:	31.2	32.5	25.5	32.2	30.3	:	25.6	12.2	30.4	35.6	20.0
Wage adjusted labour productivity (%)	132.0	121.1	118.3	:	141.3	130.7	:	128.8	140.7	:	113.5	122.5	134.3	129.9	137.4
Gross operating rate (%)	5.0	3.0	4.4	:	7.8	4.9	:	5.3	3.2	:	4.3	5.8	4.3	4.6	6.6

(1) 1999.
(2) B, 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Table 18.15

Retail sale of pharmaceuticals and medical goods, cosmetic and toilet articles (NACE Group 52.3)
Main indicators, 2000

	B	DK	D (1)	EL	E	F	IRL (2)	I	L	NL	A	P	FIN	S	UK
Number of enterprises (units) (3)	5 489	654	24 695	:	29 467	29 032	1 216	34 926	129	3 420	1 989	4 583	1 179	933	7 039
Turnover (million EUR)	4 050	1 495	34 859	:	11 056	27 670	976	17 086	203	2 690	3 400	2 661	1 477	3 542	14 584
Number of persons employed (thousands)	21	8	276	:	86	152	7	91	1	44	26	19	8	13	97
Value added (million EUR)	780	321	8 587	:	2 564	6 731	250	3 174	52	568	779	506	336	490	2 747
Purchases of goods and services (million EUR)	3 275	1 218	23 274	:	8 595	20 933	740	14 127	152	2 122	2 632	2 164	1 160	3 055	11 752
Personnel costs (million EUR)	370	245	4 554	:	917	3 725	:	1 022	23	322	523	264	186	454	1 665
Gross investment in tangible goods (million EUR)	157	20	399	:	174	478	35	308	:	99	50	52	14	42	339
App. labour productivity (thous. EUR/pers. emp.)	36.8	38.7	32.6	:	29.8	44.2	33.9	34.8	55.6	12.8	29.9	26.5	42.8	36.9	28.3
Wage adjusted labour productivity (%)	152.1	122.3	173.5	:	186.3	159.5	:	147.0	193.3	166.2	137.3	165.6	161.0	102.7	153.1
Gross operating rate (%)	10.1	5.1	12.2	:	14.9	10.9	:	12.6	13.9	9.2	7.5	9.1	10.1	1.0	7.4

(1) All except turnover and persons employed, 1999. (2) 1999. (3) B, 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Table 18.16

Other retail sale of new goods in specialized stores (NACE Group 52.4)
Main indicators, 2000

	B	DK	D (1)	EL	E	F	IRL (2)	I	L	NL (3)	A	P	FIN	S	UK
Number of enterprises (units) (4)	46 679	14 759	147 313	:	257 720	171 507	11 270	367 773	1 858	44 280	20 379	74 379	13 858	33 399	99 514
Turnover (million EUR)	20 544	10 518	113 350	:	54 963	90 279	6 046	84 157	1 279	29 673	18 138	12 635	7 082	17 794	129 443
Number of persons employed (thousands)	128	84	1 090	:	675	631	52	754	8	341	147	194	43	112	1 229
Value added (million EUR)	3 229	2 365	29 614	:	11 607	20 220	1 287	13 774	269	6 645	4 047	1 913	1 361	3 794	29 714
Purchases of goods and services (million EUR)	17 418	8 358	76 359	:	43 801	70 561	4 858	72 397	1 005	23 060	14 139	10 978	5 886	14 344	97 017
Personnel costs (million EUR)	1 639	1 607	18 537	:	6 386	14 161	:	5 833	169	3 733	2 830	1 354	893	2 710	17 934
Gross investment in tangible goods (million EUR)	872	270	2 044	:	2 074	3 235	138	1 536	:	1 041	512	454	175	490	5 116
App. labour productivity (thous. EUR/pers. emp.)	25.1	28.1	27.4	:	17.2	32.0	24.7	18.3	31.9	22.5	27.4	9.8	31.4	33.9	24.2
Wage adjusted labour productivity (%)	120.1	126.1	144.6	:	116.7	125.5	:	88.3	134.9	145.3	123.9	99.9	131.9	117.1	151.3
Gross operating rate (%)	7.7	7.2	9.9	:	9.5	6.7	:	9.4	7.8	9.8	6.7	4.4	6.6	6.1	9.1

(1) All except turnover and persons employed, 1999. (2) 1999. (3) All except number of enterprises, persons employed and investment, 1998. (4) B, 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Table 18.17

Retail sale of second-hand goods in stores (NACE Group 52.5)
Main indicators, 2000

	B	DK	D (1)	EL	E	F	IRL (2)	I	L	NL	A	P	FIN	S	UK
Number of enterprises (units) (3)	2 138	424	3 233	:	1 703	14 551	403	3 620	46	3 125	1 007	543	768	1 701	6 175
Turnover (million EUR)	243	69	596	:	128	2 026	59	244	4	:	128	40	57	108	3 330
Number of persons employed (thousands)	3	1	8	:	3	15	1	5	0	6	2	1	1	2	27
Value added (million EUR)	44	17	143	:	38	450	16	59	1	:	42	6	15	19	936
Purchases of goods and services (million EUR)	204	54	249	:	97	1 660	48	204	3	:	87	35	44	91	2 366
Personnel costs (million EUR)	14	6	45	:	23	239	:	21	0	:	18	6	7	8	286
Gross investment in tangible goods (million EUR)	15	2	8	:	6	53	2	9	:	:	6	2	2	3	85
App. labour productivity (thous. EUR/pers. emp.)	13.0	18.2	21.9	:	12.5	29.9	17.9	11.5	27.4	:	20.9	6.5	21.4	10.2	34.2
Wage adjusted labour productivity (%)	77.2	101.3	219.9	:	88.6	109.4	:	57.3	120.0	:	111.9	62.3	96.0	48.8	245.3
Gross operating rate (%)	12.4	15.5	23.0	:	11.6	10.4	:	15.6	23.3	:	18.6	1.0	14.2	10.5	19.5

(1) All except turnover and persons employed, 1999. (2) 1999. (3) B and NL, 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Table 18.18

Retail sale not in stores (NACE Group 52.6)
Main indicators, 2000

	B	DK	D (1)	EL	E	F	IRL (2)	I	L	NL (1)	A	P	FIN	S	UK
Number of enterprises (units) (3)	4 940	881	37 168	:	49 941	69 408	216	110 291	176	16 800	1 803	11 601	887	4 200	14 384
Turnover (million EUR)	1 306	335	32 899	:	3 419	13 593	231	9 518	55	2 651	1 450	525	360	1 574	18 272
Number of persons employed (thousands)	9	3	165	:	78	90	1	146	0	26	8	14	2	10	143
Value added (million EUR)	181	49	5 838	:	833	2 181	45	1 899	13	538	214	69	45	250	3 644
Purchases of goods and services (million EUR)	1 123	297	22 424	:	2 598	11 584	187	7 863	42	2 143	1 240	466	326	1 371	14 723
Personnel costs (million EUR)	82	31	3 281	:	305	1 773	:	343	6	181	175	34	36	224	2 496
Gross investment in tangible goods (million EUR)	38	5	504	:	182	300	3	404	:	57	18	15	5	37	523
App. labour productivity (thous. EUR/pers. emp.)	19.5	18.7	34.4	:	10.7	24.4	35.8	13.0	29.3	21.4	26.2	4.8	22.8	25.4	25.4
Wage adjusted labour productivity (%)	87.8	89.1	150.4	:	107.8	89.5	:	55.0	133.1	147.2	95.2	33.1	100.6	70.1	131.0
Gross operating rate (%)	7.6	5.4	8.6	:	15.5	3.0	:	16.3	12.4	13.3	2.7	6.6	2.6	1.6	6.3

(1) All except turnover and persons employed, 1999. (2) 1999. (3) B, 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Table 18.19

Repair of personal and household goods (NACE Group 52.7)
Main indicators, 2000

	B	DK	D (1)	EL	E	F	IRL (1)	I	L	NL	A	P	FIN	S	UK
Number of enterprises (units) (2)	2 049	1 432	9 822	:	16 300	16 949	911	27 272	72	3 385	912	6 142	1 465	3 601	5 890
Turnover (million EUR)	171	267	1 249	:	922	1 756	83	1 614	10	374	115	180	125	480	1 612
Number of persons employed (thousands)	3	3	24	:	33	31	2	42	0	10	2	9	2	7	31
Value added (million EUR)	59	105	513	:	431	771	34	629	5	174	51	53	53	167	860
Purchases of goods and services (million EUR)	111	171	681	:	494	983	49	1 046	5	199	64	132	73	320	699
Personnel costs (million EUR)	32	53	244	:	261	548	:	177	4	73	33	30	29	116	460
Gross investment in tangible goods (million EUR)	9	9	30	:	31	60	3	105	:	7	4	9	5	13	97
App. labour productivity (thous. EUR/pers. emp.)	22.1	33.3	21.6	:	13.2	25.0	17.5	15.1	22.5	17.4	21.8	5.9	28.7	25.5	28.0
Wage adjusted labour productivity (%)	77.8	117.1	159.4	:	86.6	91.5	:	80.9	102.1	74.1	92.9	59.9	102.0	82.1	149.1
Gross operating rate (%)	15.7	19.5	21.5	:	18.4	12.7	:	28.0	16.9	26.9	15.8	12.6	19.7	10.8	24.8

(1) 1999. (2) B, 1999.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Tourism

According to the World Tourism Organisation (WTO), France was the country in the world welcoming the largest number of international tourists in 2001 (see Table 19.1). It recorded 76.5 million international tourist arrivals, 1.1 % more than in 2000 and equivalent to 11.0 % of the world's total. Spain followed with 49.5 million arrivals (up 3.4 %), overtaking the United States, which lost second place after suffering a significant decline in its number of arrivals (- 10.7 %) in 2001, a probable consequence of the terrorist attacks it suffered on 11 September that year. Italy ranked fourth with 39.1 million arrivals, down 5.2 %.

Within the EU, international tourism receipts were highest in Spain (EUR 33.6 billion), closely followed by France (EUR 32.4 billion) and Italy (EUR 29.7 billion), representing together almost one fifth of the world's total (see Table 19.2). These three countries followed the United States, which topped the world ranking of tourism earners with EUR 80.7 billion of receipts. It is interesting to note that smaller countries such as Austria and Greece were also among the top 10 tourism earners worldwide, with EUR 11.3 billion and EUR 10.3 billion of receipts respectively.

Table 19.1

Top 10 tourism destinations, 2001

	International tourist arrivals (millions)	Change 2001/2000 (%)	World market share (%)
F	76.5	1.2	11.0
E	49.5	3.4	7.1
US	45.5	-10.7	6.6
I	39.1	-5.2	5.6
CN	33.2	6.2	4.8
UK	22.8	-9.4	3.3
RU (1)	21.2	:	3.0
MX	19.8	-4.0	2.9
CA	19.7	0.2	2.8
A	18.2	1.1	2.6

(1) 2000.
Source: World Tourism Organisation.

Table 19.2

Top 10 tourism earners, 2001

	International tourism receipts (billion EUR)	Change 2001/2000 (%)	World market share (%)
US	80.7	-9.1	1.6
E	36.7	7.6	7.1
F	33.5	0.5	6.5
I	28.8	-3.3	5.6
CN	19.9	13.5	3.8
D	19.2	-4.1	3.7
UK	18.2	-13.8	3.5
CA	12.1	4.4	2.3
A	11.3	5.4	2.2
EL (1)	10.3	:	1.9

(1) 2000.
Source: World Tourism Organisation.

Tourism can be defined as the activities serving persons travelling to and staying in places outside their usual environment for not more than one consecutive year, for leisure or business purposes. On the supply side, tourism relies on enterprises from a variety of sectors, which can be summarised as the provision of accommodation, food and drink, transport facilities and services and entertainment. This chapter covers activities which make up a significant part of the tourism market: hotels and restaurants (NACE Division 55), recreation, zoological and amusement parks (NACE Classes 92.33 and 92.53) and travel agencies (NACE Group 63.3). It should be noted, however, that these activities may also provide services for purposes other than tourism, while there are other activities, notably transport services (see Chapter 20), that also contribute to tourism that are covered elsewhere in this publication.

NACE

55: hotels and restaurants;
55.1: hotels;
55.2: camping sites and other provision of short-stay accommodation;
55.3: restaurants;
55.4: bars;
55.5: canteens and catering;
63.3: activities of travel agencies and tour operators; tourist assistance activities n.e.c.;
92.33: fair and amusement park activities;
92.53: botanical and zoological gardens and nature reserves activities.

The four largest EU economies represented approximately one quarter of the world's expenditure on international tourism (see Table 19.3). Germany was the world's second largest tourism spender in 2001 (after the United States) with international expenditure of EUR 51.6 billion. British tourists followed with expenditure equal to EUR 40.8 billion. It is important to note the expenditure of Dutch tourists reaching EUR 13.4 billion.

The vast majority of international tourists checking-in at EU hotels in 2001 were coming from other Member States (58.9 %). Americans (predominantly from North America) represented 13.5 % of hotel arrivals, more than east European countries (13.2 %) – see Table 19.4.

Table 19.3

Top 10 tourism spenders, 2001

	International tourism expenditure (EUR billion)	Change 2001/2000 (%)	World market share (%)
US	65.8	-11.4	12.7
D	51.6	-5.9	10.0
UK	40.8	-2.5	7.9
JP	29.6	-19.4	16.8
F	19.8	-3.6	3.8
I	15.9	-12.3	3.1
CN (1)	14.2	:	:
HK	14.0	-3.0	2.7
NL	13.4	-4.6	2.6
CA	13.0	-7.0	2.5

(1) 2000.
Source: World Tourism Organisation.

Table 19.4

International tourist arrivals in the EU by region of departure, 2001 (% of arrivals in hotels) (1)

EU	58.9
Americas	13.5
Other Europe (2)	13.2
Asia	6.3
EFTA	4.3
Oceania (3)	1.6
Africa (4)	1.0

(1) IRL, 2000; EL and UK, 1999.
(2) IRL, 2000; DK, EL and UK, 1999.
(3) IRL, 2000; EL and UK, 1999; DK, not available.
(4) IRL, 2000; EL and UK, 1999; DK and S, not available.
Source: Eurostat, Tourism (theme4/tour/sect_b/b_3).

STRUCTURAL PROFILE

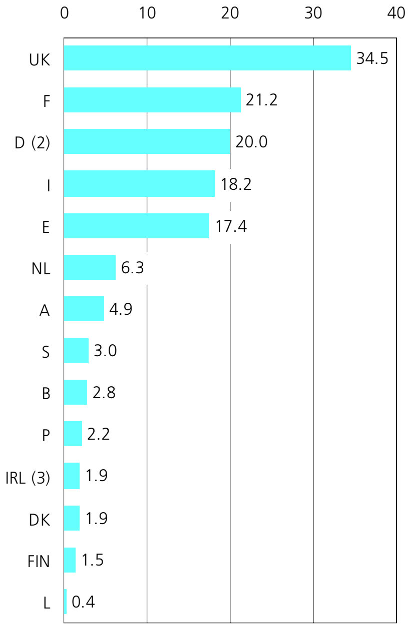
The sector of hotels and restaurants (NACE Division 55) ranks among the largest in the EU economy (at NACE division level). On the basis of SBS data, it generated value added estimated at EUR 146 billion in 2000, approximately 3.1 % of the business economy total (NACE Sections C to K) and 5.4 % of the service sector total. As a comparison, this was more than land transport services (EUR 144 billion) and not far from the size of the chemical sector (EUR 155 billion). It must be noted that these figures exclude travel agencies (where value added was equal to EUR 17.3 billion in 2000, see Subchapter 19.1) and recreation and amusement parks (no official data available). Employment in hotels and restaurants reached 7.1 million persons in 2000, which constituted the fifth largest sectoral labour market in the EU economy (at the NACE division level).

The United Kingdom contributed the most to the sector's value added, with EUR 34.5 billion in 2000, ahead of France with EUR 21.2 billion, Germany (1999) with EUR 20.0 billion and Italy with EUR 18.2 billion. In relative terms, however, the hotels and restaurants' sector was most important in the economies of Spain (EUR 17.4 billion, or 2.9 % of GDP), Ireland (2.4 % of GDP) and Austria (2.3 % of GDP). Despite Italy and France being very popular tourist destinations, the value added generated by the hotels and restaurants' sector in these two countries represented only 1.6 % and 1.5 % of GDP respectively, shares on a par with the EU average, which was 1.6 % [1]. In contrast, hotels and restaurants represented 1.1 % or less of the GDP in Germany, Belgium and the Nordic countries.

[1] D, 1999; IRL; 1998; EL, not available.

Figure 19.1

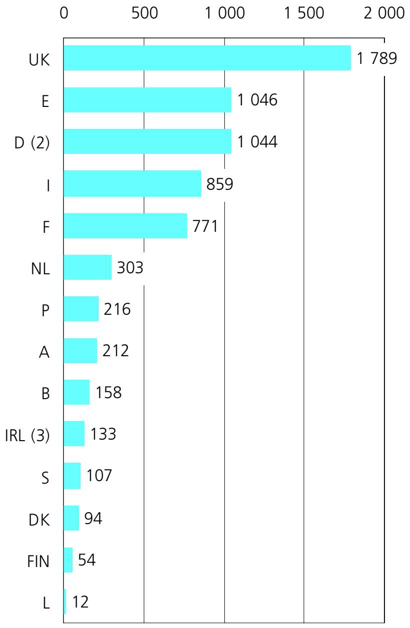
Hotels and restaurants (NACE Division 55) Value added, 2000 (billion EUR) (1)



(1) EL, not available.
(2) 1999.
(3) 1998.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 19.2

Hotels and restaurants (NACE Division 55) Number of persons employed, 2000 (thousands) (1)



(1) EL, not available.
(2) 1999.
(3) 1998.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

The breakdown of the hotels and restaurants' sector between accommodation and the provision of food and beverages is weighted in favour of the latter. The provision of food and beverages (see Subchapter 19.3) covered by NACE Groups 55.3 to 55.5 accounted for 63.7 % of the value added of NACE Division 55 in 2000 [2]. Accommodation services (see Subchapter 19.2) therefore represented 36.3 % of the total, although they accounted for a higher share in countries which are popular as holiday destinations, such as Spain (39.8 %), Italy (39.9 %) and Austria (55.3 %).

One important characteristic of the hotels and restaurants' sector is the prevalence of small businesses. According to SBS data in 2000 [3], EU enterprises with less than 10 persons employed accounted for as much as 38.5 % of sectoral value added and 45.2 % of employment and enterprises with between 10 and 49 persons employed accounted for 24.9 % of value added and 24.7 % of employment. Only one fifth (20.4 %) of the workforce was employed in large enterprises (with 250 or more persons employed), although they generated almost one quarter (24.8 %) of total value added.

LABOUR AND PRODUCTIVITY

Work patterns within the tourism sector are generally different from those found in other activities. For example, work may have a high seasonal component or working hours may be atypical, requiring grater flexibility from the workforce. As many as 27.5 % of the total number of persons in employment in the hotels and restaurants' sector in the EU in 2001 worked on a part-time basis. This share was among the highest in the business economy and almost eight percentage points above the average for services (19.8 %, NACE Sections G to K). Part-time work was of particular importance in Denmark, Finland and the United Kingdom, where the difference was widest between the recourse to part-time work in this sector and the business economy. In contrast, in Germany, Portugal and Austria the frequency of part-time work in the hotels and restaurants' sector was closest to respective averages in the national economies.

(2) D, 1999; IRL, 1998; EL, not available.
(3) D and S, 1999; EL, IRL and L, not available

One fifth of the hotels and restaurants' workforce in the EU was self-employed in 2001 (20.6 %), with a peak of 38.4 % in Belgium. In comparison, the EU average for the business economy was 14.7 %. It must be noted that only one tenth of this sector's workforce in the United Kingdom was self-employed, a proportion below the national average (12.5 %).

Family workers were also of notable importance in this sector, accounting for as much as 5.0 % of the workforce in the EU in 2001 (compared to an average of 1.6 % in the business economy). The share of family workers reached 11.8 % in Greece and 13.8 % in Italy in 2001.

The majority of the workforce in the hotels and restaurants' sector in the EU in 2001 were women, 53.4 % of the persons employed, which was 19 percentage points above the average for the whole business economy (34.4 %).

Average personnel costs in the hotels and restaurants' sector were generally lower than in other service sectors. SBS data shows that they were typically below the EUR 20 000 mark, with an average in 2000 of EUR 14 600 per employee in those countries for which data are available [4]. Average personnel costs ranged between EUR 9 000 in Portugal and EUR 22 900 in Sweden. The importance of part-time and seasonal work may explain, to some degree, these relatively low levels. The ratio may also be influenced by the fairly high presence of low or unskilled manpower in the sector.

Low average personnel costs were matched by equally low apparent labour productivity levels. In 2000, each person employed in the hotels and restaurants' sector generated an average of EUR 20 500 of value added, less than half the services' average (EUR 42 900). Wage adjusted labour productivity averaged 137.2 % in those countries for which data are available [5] and was below 140 % in the majority of Member States.

(4) D, 1999; IRL, 1998; EL, not available.
(5) D, 1999; IRL, 1998; EL, not available.

Table 19.5

Hotels and restaurants (NACE Division 55)
Labour force characteristics (% of total employment)

	Female		Part-time		Self-employed	
	1996	2001	1996	2001	1996	2001
EU-15	52.5	53.4	25.3	27.5	23.7	20.6
B	50.6	50.8	23.0	26.1	37.3	38.4
DK	63.1	56.2	47.0	39.9	12.6	8.8
D	57.6	57.9	22.7	29.0	22.9	20.3
EL	40.2	46.4	5.4	5.5	34.9	28.9
E	42.1	47.1	10.9	12.9	29.1	24.6
F	48.8	48.7	21.4	22.9	22.7	19.5
IRL	56.0	58.8	22.9	33.9	20.5	13.9
I	46.4	48.3	11.3	15.0	32.7	29.8
L	47.2	50.7	9.5	13.7	25.6	23.7
NL	51.1	52.1	55.4	63.4	15.4	15.7
A	63.4	63.8	17.0	21.4	19.6	14.7
P	49.0	60.7	4.7	7.5	34.5	28.4
FIN	73.0	71.9	32.1	27.4	13.0	13.9
S	54.9	55.1	30.1	34.2	20.1	16.7
UK	60.2	57.5	51.2	50.0	13.3	10.3

Source: Eurostat, Labour Force Survey.

19.1: TRAVEL AGENCIES

Travel services are carried out by enterprises that are engaged in arranging transport, accommodation and catering on behalf of travellers. The activity is covered by NACE Group 63.3 that encompasses furnishing travel information, advice and planning, arranging made-to-measure tours, accommodation and transportation for travellers and tourists, furnishing tickets, the sale of packaged tours and the activities of tour operators and tourist guides.

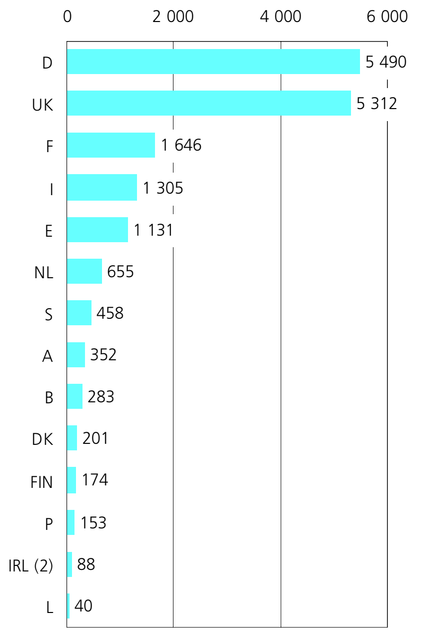
Travel agencies are generally specialised in bookings to medium and long-haul destinations, whereas domestic holidays and the bulk of rail and road transport bookings tend to bypass them. As a consequence, one of the key variables affecting demand for travel services is the evolution of air transport. In this area, travel agencies face increasing competition from direct sales of airlines and tour operators, attracted by the opportunity to eliminate agents' commissions. Virtually all airlines now offer the opportunity to book a flight from their Internet site, and for low-cost carriers direct sales generally represent the bulk of their turnover. Tour operators are following a similar path, by complementing their traditional paper catalogues with websites that offer tourists the opportunity to gather information, visit and eventually book their stay on-line. In Europe, the travel industry is expected to be one of the fastest growing sectors for on-line sales during the next few years [6]. The most popular travel site in Europe in January 2002 [7] was Bahn.de, with 2.1 million visitors, followed by Lastminute.com with 1.7 million visitors, and Easyjet.com with almost 1 million visitors. The rest of the top 10 travel sites included Trenitalia.com, Ryanair.com, Expedia.co.uk, Voyages-sncf.com, Go-fly.com, Britishairways.com and Expedia.com.

According to Eurostat's TOUR database, Swedish tourists were the most likely to let a travel agent organise their holidays, while Austrians and Greeks favoured direct booking of their own accommodation and transport – see Table 19.6.

[6] *Source:* Centre for Regional and Tourism Research: http://www.crt.dk/uk/staff/chm/trends.htm.
[7] *Source:* Jupiter MMXI.

Figure 19.3

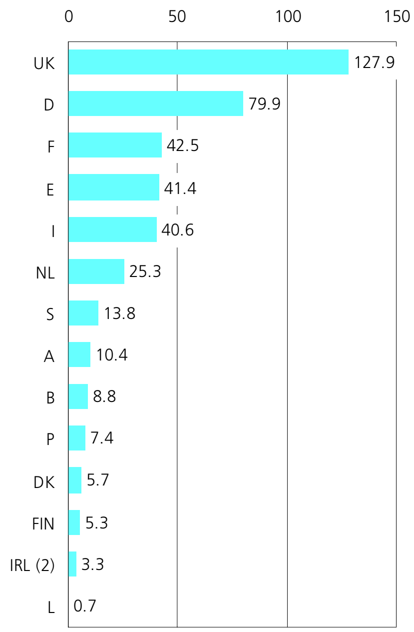
Activities of travel agencies and tour operators; tourist assistance activities n.e.c. (NACE Group 63.3)
Value added, 2000 (million EUR) (1)



(1) EL, not available.
(2) 1998.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 19.4

Activities of travel agencies and tour operators; tourist assistance activities n.e.c. (NACE Group 63.3)
Number of persons employed, 2000 (thousands) (1)



(1) EL, not available.
(2) 1998.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Table 19.6

Breakdown of tourist trips by organisational mode, 2001 (%)

	Direct reservation	Travel agent / tour operator	Other
B (1)	62.8	31.9	5.3
DK (1)	54.2	45.8	:
D	54.6	45.4	:
EL (2)	81.9	2.2	15.9
E	13.5	21.3	65.2
F (1)	59.7	40.3	:
IRL	:	:	:
I	34.4	22.8	42.8
L	32.1	44.0	23.9
NL	36.9	39.0	24.1
A	67.3	32.7	0.0
P	44.3	11.1	44.6
FIN	15.9	23.5	60.5
S (3)	33.5	66.5	:
UK	:	:	:

(1) 2000.
(2) 1998.
(3) 1997.
Source: Eurostat, Tourism (theme4/tour/sect_c/c_2).

Table 19.7

Activities of travel agencies and tour operators; tourist assistance activities n.e.c. (NACE Group 63.3)
Main indicators, growth rates (%)

	Turnover					Value added					Number of persons employed				
	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000
EU-15	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
B	5.7	3.7	10.6	13.6	21.2	-7.2	-3.3	-4.1	25.5	15.6	9.7	-5.5	12.1	4.1	19.4
DK	:	:	:	:	-0.9	:	:	:	:	-11.3	:	:	:	:	-6.8
D	:	:	134.2	7.2	50.0	:	:	:	:	22.0	:	:	:	:	:
EL	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
E	:	:	17.7	14.1	11.2	:	:	-1.9	11.4	10.3	:	:	40.7	10.5	9.5
F	17.5	7.1	10.2	5.1	12.9	14.5	6.0	17.0	6.5	10.9	12.8	2.0	0.8	7.3	11.2
IRL	:	38.7	10.6	:	:	:	-6.9	31.3	:	:	:	0.8	12.9	:	:
I	2.6	17.0	28.2	-2.3	9.6	5.4	-4.5	22.3	-2.0	23.2	-0.2	-0.3	13.6	1.8	13.8
L	-34.4	4.5	6.4	-4.5	7.2	31.9	43.1	-3.6	8.9	-0.7	-6.6	6.7	-4.6	6.7	6.6
NL	-6.3	7.7	8.6	:	:	-24.5	14.9	9.6	:	:	8.6	-8.8	-0.1	12.6	9.0
A	:	:	5.9	7.7	-2.0	:	:	8.6	-7.9	12.2	:	:	5.1	4.5	1.0
P	:	14.0	11.5	-2.6	9.8	:	14.8	-17.4	28.9	11.2	:	2.0	-0.3	12.3	-5.3
FIN	418.7	13.4	-4.7	6.4	-10.9	9.0	3.5	21.7	7.8	5.8	11.0	16.0	6.6	9.9	1.0
S	12.7	-4.7	-25.9	27.7	10.6	23.5	1.3	4.7	17.2	-1.2	:	:	8.1	1.2	11.1
UK	3.6	23.7	18.8	133.4	1.7	:	:	4.2	151.2	20.6	:	:	:	15.7	0.0

Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

STRUCTURAL PROFILE

According to SBS data, the value added generated by EU travel agencies reached EUR 17.3 billion in 2000 [(8)]. Germany (EUR 5.5 billion) and the United Kingdom (EUR 5.3 billion) contributed most to this total, reflecting their positions at the top of the ranking of tourist spenders in the EU. Among the smaller Member States, travel agencies were relatively important in the Netherlands (EUR 655 million), Sweden (EUR 458 million) and Austria (EUR 351 million).

This sector has benefited from strong growth in recent years, as witnessed by the development of value added during the second half of the 1990s. In those countries for which data are available [(9)], value added increased on average by between 5 and 10 % per annum in current price terms between 1995 and 2000 in the majority of Member States. Luxembourg saw a doubling of value added over the period considered, while value added trebled in the United Kingdom between 1997 and 2000.

(8) IRL, 1998; EL, not available.
(9) A lengthy time-series is not available for DK, D, EL and IRL.

EU travel agencies employed 412 900 persons in 2000 [(10)]; almost one third of the total were working in the United Kingdom (127 900 persons) and one fifth in Germany (79 900 persons). Again, the Netherlands stood out with a large workforce (25 300 persons) in relation to the size of its economy. Mirroring the positive development of value added noted above, travel agencies significantly increased the number of persons employed in recent years. Of the 11 countries reporting time-series for the second half of the 1990s [(11)], eight saw their number of persons employed increase, on average, by more than 5 % per annum.

The importance of small enterprises is highlighted by the fact that in 2000 almost one quarter (24.8 %) of the value added in the travel agencies' sector was generated by enterprises that employed between one and nine persons [(12)] and 22.4 % of the total by enterprises with between 10 and 49 persons employed [(13)].

(10) IRL, 1998; EL, not available.
(11) P, 1996-2000; E and S, 1997-2000;
UK, 1998-2000; DK, D, EL and IRL, not available.
(12) I, FIN and S, 1999; IRL, 1997; D, EL and L, not available.
(13) S, 1999; IRL, 1997; NL, 1995; D, EL and L, not available.

LABOUR AND PRODUCTIVITY

Most of the persons employed in the travel agencies' sector in 2000 were employees (91.8 %) [14], although the Netherlands (89.1 %), Belgium (83.5 %) and particularly Italy (73.1 %) reported a greater presence of non-salaried workers (for example, the self-employed). In France, employees (99.7 %) constituted virtually all of the workforce.

(14) IRL, 1998; EL, not available.

Average personnel costs tend to be somewhat lower in travel agencies when compared to other service activities, but higher than in the other tourism related activities. In those countries for which data are available [15], personnel costs averaged EUR 27 700 per employee in 2000, not far from being twice as high as in the hotels and restaurants' sector (EUR 14 600) [16]. Among the Member States, average personnel costs ranged between EUR 15 700 in Portugal and EUR 33 100 per employee in France.

(15) IRL, 1998; EL, not available.
(16) D, 1999; IRL, 1998; EL, not available.

In a similar fashion, apparent labour productivity in travel agencies was slightly below the services' average, at EUR 41 900 per person employed in 2000 [17], but significantly higher than for hotels and restaurants (EUR 20 000) [18].

Wage adjusted labour productivity was highest in Germany (239.0 %) and Luxembourg (213.2 %), where average personnel costs reached respectively EUR 28 700 and EUR 28 500 per employee in 2000. In most other countries [19], wage adjusted labour productivity was above 115 %, with Denmark (109.7 %), Belgium (102.6 %) and Sweden (100.8 %) the exceptions.

(17) IRL, 1998; EL, not available.
(18) D, 1999; IRL, 1998; EL, not available.
(19) IRL, 1998; EL, not available.

19.2: ACCOMMODATION SERVICES

Accommodation services are covered by two NACE groups: 55.1 includes the provision of short-stay lodging in hotels, motels and inns, excluding the rental of long-stay accommodation and timeshare operations; while Group 55.2 covers camping sites and other short-stay accommodation, including self-catering holiday chalets or cottages.

Accommodation services range from small, family-run businesses to well-known multinational franchises, and from youth hostels with basic amenities to luxurious five-star hotels. In common, they all provide accommodation to persons travelling for a short period of time outside of their normal environment.

Technology has had a great impact on the tourism business, and the accommodation sector is no exception. On the supply side, hotels are increasingly adopting '*real-time pricing*' tools aimed at improving occupancy rates and average revenue, in a similar fashion to airlines. On the demand side, bookings through the Internet are expected to play an ever-increasing role as hotels increase their presence through Internet sites and on-line reservation systems become more appealing to travellers.

STRUCTURAL PROFILE

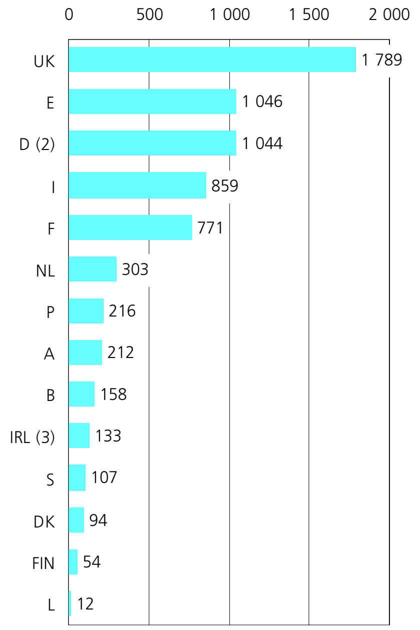
EU accommodation services' enterprises (NACE Groups 55.1 and 55.2) generated value added worth EUR 49.4 billion in 2000 [20]. Almost one quarter was accounted for by the United Kingdom (EUR 10.9 billion), while Germany (EUR 7.6 billion, 1999), France (EUR 7.5 billion), Italy (EUR 7.3 billion) and Spain (EUR 6.9 billion) followed within a relatively restricted range. Among the smaller economies, Austria (EUR 2.7 billion) and the Netherlands (EUR 1.9 billion) reported that this sector provided a relatively high contribution to total value added (note that no data are available for Greece).

The development of value added in recent years sheds light on a relatively dynamic sector. Growth was very strong in all countries [21], as several Member States posted double-digit average annual growth rates, in current price terms, during the second half of the 1990s, such as Portugal (11.1 % per annum between 1996 and 2000), the United Kingdom (13.2 % per annum between 1997 and 2000) and Spain (13.8 % per annum between 1998 and 2000).

(20) D, 1999; IRL, 1998; EL, not available.
(21) A lengthy time-series is not available for DK, D, EL and IRL.

Figure 19.5

Hotels; camping sites, other provision of short-stay accommodation (NACE Groups 55.1 and 55.2) Value added, 2000 (million EUR) (1)



(1) EL, not available.
(2) 1999.
(3) 1998.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Table 19.8

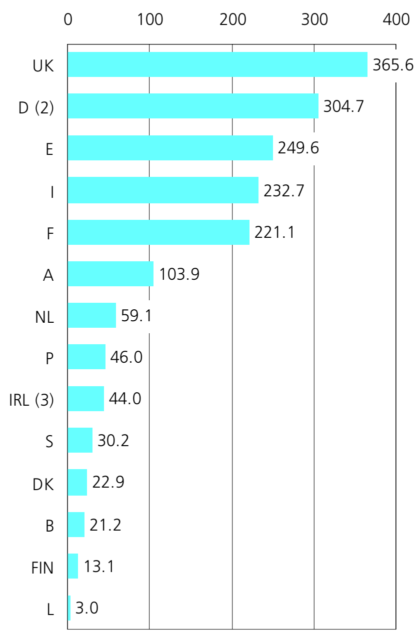
Hotels; camping sites, other provision of short-stay accommodation (NACE Groups 55.1 and 55.2)
Main indicators, growth rates (%)

	Turnover					Value added					Number of persons employed				
	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000
EU-15	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
B	-0.8	-6.4	-0.6	10.8	3.3	-7.6	-5.1	-1.8	8.3	9.6	2.4	0.0	-1.0	0.0	5.7
DK	:	:	:	:	5.8	:	:	:	:	7.8	:	:	:	:	2.8
D	-3.6	-0.1	-4.9	6.4	:	:	:	:	:	:	2.0	-1.6	-8.7	1.5	:
EL	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
E	:	:	:	13.3	9.8	:	:	:	15.1	12.4	:	:	:	1.0	5.9
F	:	3.3	8.9	7.9	9.4	:	4.5	7.9	12.6	9.6	:	0.0	1.0	3.9	8.5
IRL	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
I	4.7	9.9	7.4	-2.8	16.9	8.6	2.5	15.4	-7.8	20.2	-1.6	-4.8	2.3	-3.8	12.9
L	-4.1	2.6	1.9	4.9	1.5	-5.5	3.0	4.4	-5.0	9.7	-1.4	-1.8	3.4	-4.8	-0.3
NL	:	:	7.6	7.8	14.2	:	:	7.3	8.2	13.1	0.8	6.2	3.1	6.0	15.1
A	:	:	2.8	1.3	5.6	:	:	3.7	3.1	6.6	:	:	1.5	0.6	-0.7
P	:	19.6	9.1	8.8	2.0	:	16.1	18.0	5.0	5.7	:	16.2	-1.6	-0.2	3.5
FIN	1.5	2.9	6.8	3.6	4.3	-2.0	3.7	20.9	-8.2	4.5	3.4	4.8	13.5	-0.8	-1.0
S	8.6	-1.9	6.6	9.2	15.4	14.7	5.3	9.2	11.1	13.9	:	:	0.7	4.1	5.8
UK	11.2	24.0	10.2	-10.2	18.0	:	:	9.9	4.3	26.6	:	:	:	-2.5	3.9

Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 19.6

Hotels; camping sites, other provision of short-stay accommodation (NACE Groups 55.1 and 55.2) Number of persons employed, 2000 (thousands) (1)



(1) EL, not available.
(2) 1999.
(3) 1998.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Enterprises in this sector were predominantly of (very) small size. Those with nine or less persons employed accounted for almost one quarter of the sector's value added and employment (23.4 % and 27.7 %, respectively) in 2000, and those with between 10 and 49 persons employed not far from one third (31.4 % and 33.5 %, respectively) [22].

Accommodation services have recourse to a relatively large labour base, with some 1.7 million persons employed in the EU in 2000 [23]. The United Kingdom (365 000 persons) and Germany (305 000 persons) were the largest labour markets, while popular tourist destinations such as France, Spain and Italy all had more than 200 000 persons employed in this sector. It is also interesting to note the relatively high importance of this sector in terms of providing work in Austria, where some 104 000 persons were employed.

(22) In both cases, D, P and S, 1999; EL, IRL and L, not available.
(23) D, 1999; IRL, 1998; EL, not available.

There were 197 500 hotels and similar establishments in the EU in 2001 (see Table 19.9), with a capacity of some 9.5 million bed places within 4.8 million rooms. More than one quarter of all the establishments were in the United Kingdom alone (50 500) and almost one fifth of the total in Germany (38 600). On average, a typical establishment in the EU could lodge 48 persons in 24 rooms, although the average size of establishments was considerably lower in the United Kingdom (24 bed places and 11 rooms) and in Ireland (27 bed places and 11 rooms). In contrast, the average number of bed places per establishment approached or exceeded 100 in the Nordic countries (Sweden, 98; Finland, 120; and Denmark, 135) as well as the Iberian peninsula (Spain, 81; and Portugal, 128).

Table 19.9

Main indicators for hotels and similar establishments, 2001 (thousands)

	B	DK (1)	D	EL (2)	E	F	IRL (3)	I	L	NL	A (4)	P	FIN	S	UK (5)
Number of establishments	2.0	0.5	38.5	8.3	16.4	19.3	5.2	33.4	0.3	2.9	15.3	1.8	1.0	2.0	50.5
Number of bedrooms	65.0	32.5	884.5	320.2	685.7	678.9	59.5	975.6	7.6	:	288.3	99.1	55.3	99.3	553.0
Number of bed places	121.5	64.0	1 603.0	607.6	1 333.4	1 201.0	139.6	1 891.3	14.3	174.3	587.3	228.7	118.5	194.8	1 190.6
of which, net rate of utilisation (%)	34.6	40.0	34.5	56.4	58.5	59.9	48.5	41.6	26.5	45.9	38.1	79.7	37.1	34.3	41.8
Arrivals of residents	2 093	1 639	70 892	5 619	32 892	66 112	2 773	38 648	20	7 601	5 956	4 459	5 442	10 612	54 960
Arrivals of non-residents	5 117	1 310	15 754	7 229	27 012	35 226	3 577	29 138	560	7 445	13 240	4 934	1 774	2 586	17 019
Nights spent, residents	4 057	4 589	164 197	14 667	85 261	115 575	7 792	138 559	74	13 608	18 468	9 985	9 882	16 737	134 420
Nights spent, non-residents	10 011	4 551	32 876	46 636	143 421	75 653	17 680	100 322	1 148	14 955	54 086	23 578	3 675	4 927	49 781

(1) Number of establishments, bedrooms and bed places refer to hotels with at least 40 bedplaces only.
(2) Number of bedrooms and nights spent, 2000; arrivals, 1999.
(3) Arrivals of residents, 2000.
(4) Arrivals, 2000.
(5) Number of establishments and bed places, 2000; number of bedrooms, 1998.
Source: Eurostat, Tourism (theme4/tour).

Table 19.10

Main EU hotel chains, ranked by number of rooms, 2001 (units)

		Number of rooms	Number of sites	World ranking	Brands
Six Continents Hotels	UK	511 072	3 274	2	Holiday Inn, Crowne Plaza, Inter-Continental
Accor	F	415 774	3 654	4	Sofitel, Novotel, Mercure, Ibis, Etap Hôtel, Formule 1, Motel 6
Hilton Group plc (1)	UK	92 778	384	10	Hilton, Conrad
Sol Meliá	E	85 987	350	12	Meliá Hotels, Sol Hotels
TUI Group	D	70 293	278	13	Grecotel, Iberotel, Alpitour, RIU, Swiss Inn
Société du Louvre	F	69 049	933	14	Concorde, Campanile, Première Classe, Bleu Marine, Clarine
Club Méditerranée	F	39 114	129	21	Club Med, Jet tours
Golden Tulip	NL	37 906	277	22	Golden Tulip, Tulip Inn
Le Méridien	UK	37 667	145	23	Le Méridien
NH Hoteles	E	31 798	221	25	NH Hotel

(1) Owns the rights to the Hilton name outside the US.
Source: Hotels Magazine, July 2002.

The hotel sector has experienced in recent years a general trend towards a gradual increase in accommodation capacity, both in absolute terms and in terms of the average size of each establishment. This process has in part been fuelled by merger activity, especially in the second half of the 1990s when a number of hotel chains joined together forming consortiums (see Table 19.10 for more details of the most important hotel chains in the EU in 2001). Between 1995 and 2001, the average number of bed places per establishment rose from 45.3 to 48.0. In the majority of Member States this could be explained by a growth in tourism supply tending towards larger hotels, with growth in the number of bed places being faster than growth in the number of establishments. In other countries, these trends could, in part, be attributed to a reorganisation of supply, whereby smaller establishments ceased to exist. This was notably the case in France, Italy, Luxembourg and Austria, where there was a reduction in the number of establishments, while the number of bed places decreased at a slower rate or even continued to rise.

The hotel industry is characterised by a high degree of seasonal fluctuations in demand. The summer months are the busiest in every Member State, with the maximum number of nights spent generally reached in August (see Figure 19.7). Winter months record the lowest attendance in hotels, particularly in the months of December and January. In some countries, a first surge in demand can be observed around Easter (March or April), particularly in the Benelux countries and the United Kingdom. Austria, Finland and Sweden also record peaks in activity in February or March, which are probably linked to the winter ski season.

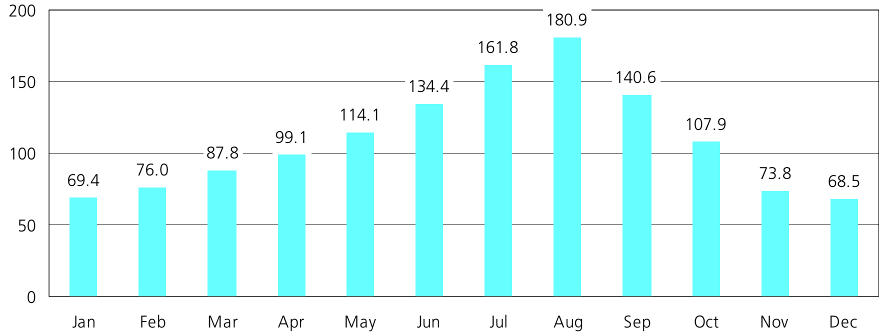
Most hotel clients are domestic guests, although the proportion of residents staying in hotels in their own country is, in part, linked to the size of each country. Non-residents represented, on average, 35.7 % of guests checking in to hotels and similar establishments in the EU in 2001 [(24)] (see Table 19.11). Less than one–fifth of the persons arriving in hotels in Germany (18.2 %) and Sweden (19.6 %) were people visiting from a foreign country. In contrast, the proportion of foreign visitors reached its maximum in Austria (69.0 %), Belgium (71.0 %) and Luxembourg (96.5 %). Together with Ireland, Greece (both 56.3 %) and Portugal (52.5 %), these were the only Member States where arrivals of non-residents outnumbered those of residents.

The average length of stays in hotels also varied considerably according to the residence criteria of visitors. Foreign guests tended to stay somewhat longer (3.4 nights on average) than residents (2.4 nights). The difference was particularly noticeable in Mediterranean countries that are popular international destinations for summer holidays, such as Greece, Spain and Portugal. The average length of stay of non-residents in those countries was more than twice as long as the average for residents, and was highest in Greece (6.3 nights, 1999), Spain (5.3 nights) and Portugal (4.8 nights).

Besides hotels and similar establishments, the EU's tourist infrastructure also relies on other types of accommodation establishments (NACE Group 55.2). This category of accommodation includes camp sites, holiday dwellings, youth hostels and collective dormitories for tourists. There were 155 000 such establishments in the EU in 2001 [(25)] (see Table 19.12). Their total capacity outnumbered that of hotels, with 12.3 million bed places [(26)]. Among these, two thirds of the total, or 105 000 bed places were in holiday dwellings, most of which were located in Italy (75 800) and Germany (10 700). The EU numbered some 22 500 tourist camp sites [(27)], more than one third of which were in France (8 000).

Figure 19.7

Number of nights spent in hotels and similar establishments in the EU, 2001 (millions) (1)



(1) EL and IRL, 2000; IRL, excluding nights spent by residents.
Source: Eurostat, Tourism (theme4/tour/sect_b/b_4).

Table 19.11

Arrivals and nights spent according to residence status, 2001

	Share of non-residents in total arrivals (%)	Average number of nights spent per arrival (units) Residents	Non-residents
EU-15	35.7	2.4	3.4
B	71.0	1.9	2.0
DK	44.4	2.8	3.5
D	18.2	2.3	2.1
EL (1)	56.3	2.6	6.3
E	45.1	2.6	5.3
F	34.8	1.7	2.1
IRL (2)	58.3	2.4	4.3
I	43.0	3.6	3.4
L	96.5	3.6	2.1
NL	49.5	1.8	2.0
A (2)	69.0	3.0	4.0
P	52.5	2.2	4.8
FIN	24.6	1.8	2.1
S	19.6	1.6	1.9
UK	23.6	2.4	2.9

(1) 1999.
(2) 2000.
Source: Eurostat, Tourism (theme4/tour/sect_b).

(24) IRL and A, 2000; EL, 1999.
(25) EL, 1999; UK, 1998.
(26) EL and P, 1999; UK, 1998.
(27) EL, 1999; UK, 1998.

Table 19.12

Main indicators for collective accommodation establishments other than hotels, 2001 (thousands)

	Number of establishments (1)	of which, tourist camp sites (2)	of which, holiday dwellings (3)	Total number of bed places (4)
B	1.7	0.5	0.1	507.7
DK	0.6	0.4	0.1	319.6
D	17.4	2.4	10.7	1 476.9
EL	:	0.3	:	93.9
E	5.5	1.2	4.3	1 310.3
F	9.1	8.0	0.9	2 570.3
IRL	2.8	0.1	2.4	64.0
I	94.9	2.4	75.8	2 133.0
L	0.3	0.1	0.1	48.9
NL	3.7	2.2	0.7	968.5
A	5.4	0.5	2.4	352.5
P	0.3	0.2	:	262.6
FIN	0.5	0.3	0.1	103.6
S	1.7	1.1	0.3	354.4
UK	10.9	2.7	7.1	1 759.7

(1) UK, 2000.
(2) EL and UK, 1999.
(3) UK, 1999.
(4) EL, 1999; UK, 1998.
Source: Eurostat, Tourism (theme4/tour).

LABOUR AND PRODUCTIVITY

Among the 1.7 million persons employed in the EU's accommodation services' sector, more than 1 in 10 (12.0 %) were self-employed or family workers in 2000 [28]. Note that these figures are based on simple head counts and do not take into account seasonal factors or the duration of work. In Italy, this proportion rose to more than one in four (26.4 %), while it was also relatively high in Germany (17.6 %, 1999), Ireland and Austria (both 18.1 %).

Apparent labour productivity in the accommodation services' sector was EUR 28 800 of value added per person employed in 2000 [29]. This was higher than for restaurants and bars (EUR 17 000), but still a long way from the average for service activities (EUR 42 900, NACE Sections G to K). Part of this difference may be explained by the high seasonal component to work in this activity and the relatively high incidence of part-time work.

However, when adjusted to take into account the level of average personnel costs and the weight of unpaid persons in persons employed, wage adjusted labour productivity in the accommodation services' sector was 158 % [30], with values for the Member States between 135 % in Austria, Sweden and France (both 136 %) and 173 % in the Netherlands and 197 % in the United Kingdom. This may be explained by the relatively low level of personnel costs in 2000, which averaged EUR 18 200 per employee in the EU in 2000 [31], with particularly low values recorded in the United Kingdom (EUR 15 100), Portugal (EUR 11 500) and Ireland (EUR 10 400).

(28) D, 1999; IRL, 1998; EL, not available.
(29) D, 1999; IRL, 1998; EL, not available.
(30) D, 1999; IRL, 1998; EL, not available.
(31) D, 1999; IRL, 1998; EL, not available.

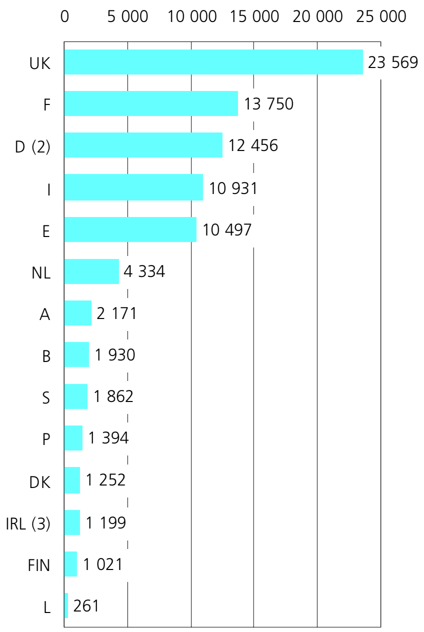
19.3: RESTAURANTS, BARS AND CATERING

The activities of the sale of meals and beverages for consumption are classified under NACE Groups 55.3 (restaurants), 55.4 (bars) and 55.5 (canteens and catering). It is important to bear in mind that only enterprises for which the provision of drinks and meals is the principal activity are covered by the statistics presented in this subchapter. Enterprises offering food and drink as a complement to their core business are not included (for example, the sale of food and beverages in cinemas, recreation parks, or transport services enterprises where, in some cases, meals and beverages may represent a significant activity.

Restaurants and bars are present in virtually every local community, but under very different forms, from small, family-run outlets to multinational franchises, or from local bars, snack outlets and fast-food chains to high-class establishments specialising in haute cuisine. Catering activities are to some extent different in the sense that they generally operate on a business-to-business level, up to a point that they could be better viewed as business services' enterprises, alongside cleaning service and security service enterprises. In this sense they have greatly benefited from the trend towards outsourcing, as enterprises, schools and public administrations that used to run their own restaurant facilities for their personnel or students have increasingly subcontracted this type of activity to specialised, independent enterprises.

Figure 19.8

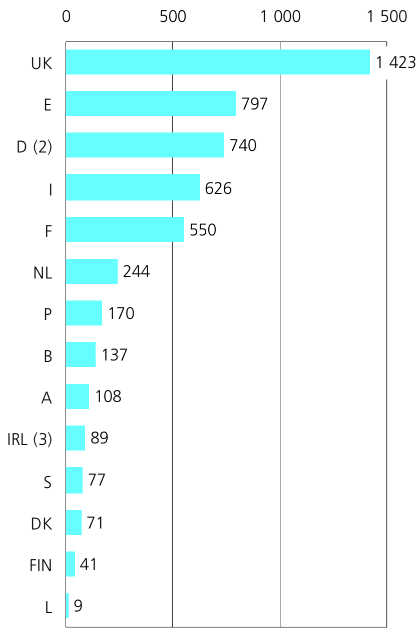
Restaurants; bars; canteens and catering (NACE Groups 55.3, 55.4 and 55.5) Value added, 2000 (million EUR) (1)



(1) EL, not available.
(2) 1999.
(3) 1998.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Figure 19.9

Restaurants; bars; canteens and catering (NACE Groups 55.3, 55.4 and 55.5) Number of persons employed, 2000 (thousands) (1)



(1) EL, not available.
(2) 1999.
(3) 1998.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

STRUCTURAL PROFILE

Restaurants, bars and catering (NACE Groups 55.3 to 55.5) together form the largest tourism-related activity, with value added in 2000 reaching EUR 86.6 billion [32], or 63.7 % of NACE Division 55. It must be noted, however, that unlike, for example, hotels, enterprises in this sector are not exclusively geared towards the tourism market but that they also serve local customers.

[32] D, 1999; IRL, 1998; EL, not available.

The United Kingdom was by far the largest contributor to sectoral value added, with EUR 23.6 billion in 2000. France had the second highest level of value added (EUR 13.8 billion), followed by Germany (EUR 12.5 billion), Italy (EUR 10.9 billion) and Spain (EUR 10.5 billion), which were the only other countries above the EUR 10.0 billion threshold, although a relatively high level of value added was reported in the Netherlands (EUR 4.3 billion).

The restaurants, bars and catering sector has enjoyed fairly strong growth in recent years, with double-digit annual increases (in current price terms) reported in several Member States, notably the United Kingdom (10.9 % per annum between 1997 and 2000), Italy (10.6 % per annum between 1995 and 2000) and Spain (16.0 % per annum between 1998 and 2000) [33]. Belgium (1.1 % between 1995 and 2000) reported the lowest average growth rate for value added among the Member States that provided data.

[33] A lengthy time-series is not available for DK, D, EL and IRL.

Table 19.13

Restaurants; bars; canteens and catering (NACE Groups 55.3, 55.4 and 55.5)
Main indicators, growth rates (%)

	Turnover					Value added					Number of persons employed				
	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000	1996	1997	1998	1999	2000
EU-15	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
B	0.9	-1.6	8.5	12.5	21.3	-8.2	3.5	-0.9	16.7	-3.9	-0.7	-1.8	10.5	4.6	1.6
DK	:	:	:	:	-3.0	:	:	:	:	-8.6	:	:	:	:	-1.0
D	-4.4	-0.4	-4.6	0.5	:	:	:	:	:	:	-0.9	-1.8	-6.7	-4.7	:
EL	:	:	:	:	:	:	:	:	:	:	:	:	:	:	:
E	:	:	:	6.5	22.4	:	:	:	4.5	28.7	:	:	:	3.7	8.2
F	3.6	0.4	6.8	8.5	6.8	-4.0	0.8	6.2	10.2	6.5	-13.2	1.4	1.6	3.7	9.7
IRL	:	20.7	11.2	:	:	:	24.8	12.3	:	:	:	13.3	10.1	:	:
I	11.3	15.6	7.6	2.5	15.7	15.0	14.8	10.5	2.2	10.9	2.5	-1.5	10.2	5.2	6.1
L	3.3	-0.5	4.8	-1.4	4.2	28.1	-0.7	-14.7	17.5	3.9	31.3	2.3	20.1	-3.1	5.5
NL	:	:	5.1	8.3	13.7	:	:	5.8	9.5	13.4	11.3	0.3	4.6	1.8	21.7
A	:	:	9.4	8.8	10.1	:	:	5.3	14.6	12.7	:	:	5.3	3.4	11.5
P	:	-4.3	-2.6	43.6	-23.6	:	-0.4	7.1	46.3	-21.1	:	-5.6	-6.8	22.9	-21.7
FIN	4.3	0.2	1.5	4.2	8.9	3.4	4.4	5.9	0.7	12.6	2.9	5.8	6.7	4.2	10.5
S	15.3	1.0	4.4	7.8	9.6	18.6	6.6	5.6	9.7	9.9	:	:	6.8	3.0	4.8
UK	7.8	25.1	6.0	-3.9	16.9	:	:	5.4	11.3	16.4	:	:	:	3.9	2.5

Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

The restaurants, bars and catering sector is very labour-intensive. It employed no less than 5.1 million persons in the EU in 2000 (34). As such, it accounted for 8.1 % of employment in the service sector, while generating 3.1 % of total value added. Employment levels were particularly high in the United Kingdom where 1.4 million persons were employed. Spain (796 600 persons employed) reported a higher number of persons working in this sector than Germany (739 500 persons) or Italy (625 800 persons), while France had the smallest workforce among the EU's five largest economies (549 700 persons). It is important to note that these figures are based on simple head counts and do not take into account seasonal factors or the duration of work.

More than any other service activity, small enterprises played a central role in the restaurants, bars and catering sector. According to SBS data, almost half (47.6 %) of the value added in the EU originated from enterprises with less than 10 persons employed in 2000 (35), while they employed 51.5 % of the workforce. Enterprises with 10 to 49 persons employed represented more than one fifth of value added (21.2 %) and employment (21.8 %), while 20.5 % of the workforce worked in large enterprises with 250 or more persons employed, contributing 24.5 % of total value added.

(34) D, 1999; IRL, 1998; EL, not available.
(35) For this paragraph based on size class data: D, P and S, 1999; IRL, 1997; EL and L, not available.

LABOUR AND PRODUCTIVITY

On average, 22.1 % of those persons employed in the EU's restaurants, bars and catering sector in 2000 (36) were not employees. While Belgium (31.9 %) and Spain (32.5 %) reported even higher proportions, Italy was the only Member State where unpaid persons outnumbered employees (51.6 %). In the United Kingdom, in contrast, more than 9 out of 10 persons were employees (92.1 %). It should be noted that, according to the British Beer and Pub Association (37), approximately one in four pubs in the United Kingdom are managed houses, meaning that they are owned by a brewery and managed by an employee.

(36) D, 1999; IRL, 1998; EL, not available.
(37) See http://www.beerandpub.com.

Restaurants, bars and catering enterprises face relatively low levels of apparent labour productivity. Each person employed in this sector generated an average of EUR 17 000 of value added in 2000 (38), less than half the services' average (EUR 42 900). Low qualification levels and the importance of part-time work may explain why average personnel costs were equally at the bottom end of the range for service sectors, equal to EUR 13 200 per person in those countries for which data are available in 2000 (39). Average personnel costs ranged from less than EUR 10 000 in Portugal (EUR 8 100) and Ireland (EUR 8 900) to a high of EUR 22 000 in France.

Combining productivity and personnel cost indicators, the resultant wage adjusted labour productivity ratio was also relatively low compared to other service activities, equal to 129.1 % in 2000 (40). This ratio was below 130 % in most Member States, with its highest values being recorded in Ireland (151 %, 1998) and the United Kingdom (156 %).

(38) D, 1999; IRL, 1998; EL, not available.
(39) D, 1999; IRL, 1998; EL, not available.
(40) D, 1999; IRL, 1998; EL, not available.

19.4: RECREATION PARKS

The recreation parks' sector includes theme parks, amusement parks, water parks, holiday camps, zoological gardens and safari parks. NACE Class 92.33 covers fairs and amusement parks, while NACE Class 92.53 covers botanical and zoological gardens and nature reserve activities. Although an important part of the tourism sector, this subsector lacks comprehensive, statistical coverage, and very few official statistics exist at the present time. As a result the majority of the information presented is based on estimates made by professional trade associations.

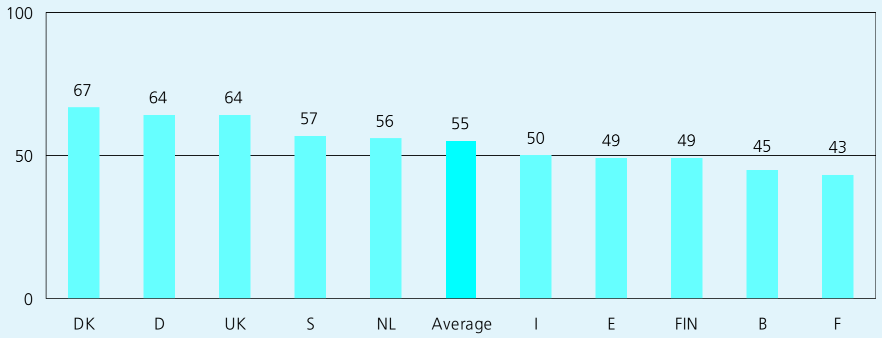
The importance of the recreation parks' sector was highlighted in a survey carried out in 2000 by the International Association of Amusement Parks and Attractions (IAAPA) that concerned 10 Member States [41]. It revealed that more than half of the population (55 %) visited at least one amusement facility in 2000. The Danes were the most likely visitors of amusement facilities, with two thirds (67 %) of the population visiting a park in 2000, just ahead of the Germans and the British (both 64 %). Sweden (57 %) and the Netherlands (56 %) were the only other countries where more than half of the population visited an amusement facility during the reference period. Belgium (45 %) and France (43 %) reported the lowest rates (see Figure 19.10).

Looking at the breakdown of the different types of facilities, recreation parks were the most popular attraction, chosen by 58 % of those persons who visited amusement facilities at least once in 2000, ahead of zoos (51 %) and water parks (38 %). The figures also reveal interesting differences among countries. In Finland, the share of persons who visited amusement parks, zoos, water parks and other attractions were all within a narrow range, as practically all visitors to amusement facilities went at least once to recreation parks (98 %), four fifths went to zoos (80 %) and almost two thirds went to water parks. Zoos were also particularly popular in the Netherlands (77 % of amusement facility visitors made at least one trip) and water parks were relatively popular in Spain (55 %) – see Table 19.14.

[41] B, DK, D, E, F, I, NL, FIN, S and UK.

Figure 19.10

Proportion of the population visiting amusement facilities, 2000 (%) (1)



(1) Persons aged 15 or over; EL, IRL, L, A and P, not available.
Source: European Amusement Industry Consumer Survey, IAAPA, 2001.

Table 19.14

Breakdown of visits to amusement facilities, 2000
(% share of persons visiting amusement facilities) (1)

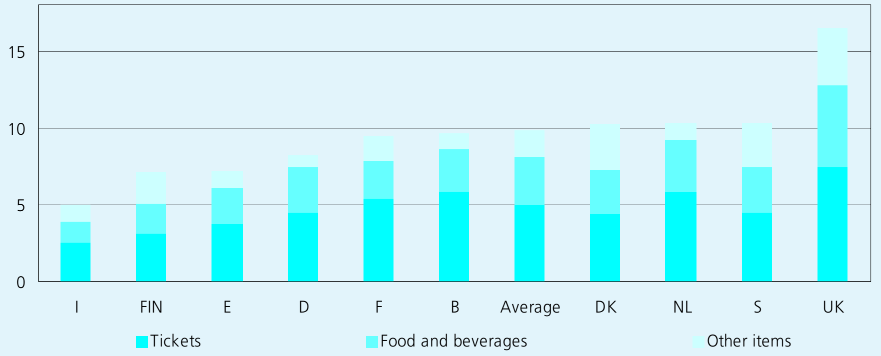
	Recreation parks	Zoos	Water parks	Other attractions
Average	58.2	50.9	38.2	47.3
B	71.1	40.0	35.6	35.6
DK	79.1	49.3	37.3	32.8
D	43.8	62.5	48.4	53.1
E	79.6	55.1	55.1	42.9
F	65.1	44.2	25.6	41.9
I	54.0	22.0	36.0	54.0
NL	82.1	76.8	44.6	55.4
FIN	98.0	79.6	63.3	77.6
S	77.2	45.6	12.3	33.3
UK	54.7	35.9	21.9	42.2

(1) Persons aged 15 or over; EL, IRL, L, A and P, not available.
Source: European Amusement Industry Consumer Survey, IAAPA, 2001.

Europeans spent an average of EUR 9.80 for their visits to amusement parks in 2000, broken down between entrance tickets (EUR 5.00), food and drinks (EUR 3.10) and other items (EUR 1.70) – see Figure 19.11. According to IAAPA, entrance fees accounted for a higher share of revenue in the EU than they did in the United States, while there was a lower level of expenditure on ancillary products in the EU. The largest recreation park in the EU is Disneyland Paris, with more than 13.1 million visitors during 2002 and turnover estimated at EUR 1.1 billion, with each visitor spending an average of EUR 44.40.

Figure 19.11

Average expenditure per visitor at amusement facilities, 2000 (1)



(1) Persons aged 15 or over; EL, IRL, L, A and P, not available.
Source: European Amusement Industry Consumer Survey, IAAPA, 2001.

Table 19.15

Hotels and restaurants (NACE Division 55)
Main indicators, 2000

	B	DK	D (1)	EL	E	F	IRL (2)	I	L	NL	A	P	FIN	S	UK
Number of enterprises (units)	41 273	13 481	185 616	:	260 528	204 151	18 476	250 209	2 486	39 745	38 133	60 221	10 562	20 784	116 140
Turnover (million EUR)	8 715	4 359	40 481	:	39 563	49 123	5 240	47 535	749	14 281	9 890	6 498	3 970	7 432	78 459
Number of persons employed (thousands)	158	94	1 044	:	1 046	771	133	859	12	303	212	216	54	107	1 789
Value added (million EUR)	2 758	1 851	20 034	:	17 436	21 212	1 866	18 200	369	6 274	4 862	2 236	1 477	2 961	34 484
Purchases of goods and services (million EUR)	5 860	2 672	20 933	:	22 349	27 574	3 382	30 494	372	7 958	4 847	4 348	2 571	4 634	41 982
Personnel costs (million EUR)	1 611	1 250	10 947	:	10 148	15 351	1 010	8 889	223	3 461	2 994	1 514	1 058	2 187	19 152
Gross investment in tangible goods (million EUR)	840	334	1 835	:	3 402	4 816	432	3 696	:	758	902	695	149	566	8 094
App. labour productivity (thous. EUR/pers. emp.)	17.4	19.7	19.2	:	16.7	27.5	14.0	21.2	29.6	20.7	22.9	10.4	27.3	27.7	19.3
Wage adjusted labour productivity (%)	120.4	132.3	147.5	:	128.1	120.5	149.2	113.1	135.4	151.5	128.9	115.8	126.4	121.1	166.7
Gross operating rate (%)	13.2	13.8	22.4	:	18.4	11.9	16.3	19.6	19.5	19.7	18.9	11.1	10.6	10.4	19.5

(1) 1999.
(2) 1998.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Table 19.16

Hotels and restaurants (NACE Division 55)
Main indicators, 2000

	BG	CY (1)	CZ	EE	HU	LV	LT	MT	PL	RO	SK	SI (2)	TR
Number of enterprises (units)	22 094	:	41 721	1 252	3 762	1 897	2 688	:	57 664	9 929	740	9 291	:
Turnover (million EUR)	496	1 132	2 360	182	980	196	175	:	2 747	677	211	687	:
Number of persons employed (thousands) (3)	77	30	169	12	59	17	22	:	175	84	16	:	:
Value added (million EUR)	152	681	599	62	307	57	49	:	1 133	203	67	221	:
Purchases of goods and services (million EUR)	379	:	1 755	126	482	145	126	:	1 747	507	131	427	:
Personnel costs (million EUR)	70	379	394	37	202	36	43	:	594	114	54	191	:
Gross investment in tangible goods (million EUR)	122	67	129	23	103	64	23	:	250	130	26	84	:
App. labour productivity (thous. EUR/pers. emp.) (3)	2.0	22.6	3.5	5.1	5.2	3.3	2.2	:	4.2	2.4	4.2	:	:
Wage adjusted labour productivity (%) (3)	134.4	:	113.2	160.4	149.7	158.3	105.3	:	114.0	153.6	121.6	:	:
Gross operating rate (%)	16.5	26.7	8.7	13.5	10.7	10.8	3.4	:	19.6	13.2	5.8	4.4	:

(1) 1998.
(2) 1999.
(3) PL, 1998.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_cc).

Table 19.17

Hotels; camping sites, other provision of short-stay accommodation (NACE Groups 55.1 and 55.2)
Main indicators, 2000

	B	DK	D (1)	EL	E	F	IRL (2)	I	L	NL	A	P	FIN	S	UK
Number of enterprises (units)	2 166	1 595	40 200	:	16 229	45 770	5 953	40 071	386	5 190	15 507	3 864	1 441	3 142	14 766
Turnover (million EUR)	1 646	1 256	14 037	:	12 334	17 237	1 447	13 842	206	3 911	5 159	1 574	1 134	2 469	19 473
Number of persons employed (thousands)	21	23	305	:	250	221	44	233	3	59	104	46	13	30	366
Value added (million EUR)	828	600	7 578	:	6 939	7 462	667	7 269	109	1 940	2 691	843	456	1 099	10 915
Purchases of goods and services (million EUR)	774	694	6 517	:	5 540	9 578	778	6 974	96	1 938	2 360	767	707	1 419	7 985
Personnel costs (million EUR)	495	383	4 140	:	3 905	5 058	374	3 620	65	1 019	1 633	500	300	776	5 209
Gross investment in tangible goods (million EUR)	285	77	914	:	2 046	2 288	224	1 747	:	398	636	381	53	278	2 677
App. labour productivity (thous. EUR/pers. emp.)	39.0	26.1	24.9	:	27.8	33.8	15.2	31.2	36.1	32.8	25.9	18.3	34.7	36.4	29.9
Wage adjusted labour productivity (%)	147.7	149.5	150.9	:	169.2	135.6	146.0	147.8	149.7	172.6	134.9	159.0	145.9	135.6	197.4
Gross operating rate (%)	20.3	17.3	24.5	:	24.6	13.9	20.2	26.4	21.4	23.5	20.5	21.8	13.8	13.1	29.3

(1) 1999. (2) 1998.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Table 19.18

Restaurants; bars; canteens and catering (NACE Groups 55.3, 55.4 and 55.5)
Main indicators, 2000

	B	DK	D (1)	EL	E	F	IRL (2)	I	L	NL	A	P	FIN	S	UK
Number of enterprises (units)	39 107	11 886	145 416	:	244 299	158 381	12 523	210 138	2 100	34 555	22 626	56 357	9 121	17 642	101 374
Turnover (million EUR)	7 069	3 103	26 444	:	27 229	31 887	3 793	33 693	543	10 370	4 730	4 925	2 836	4 963	58 986
Number of persons employed (thousands)	137	71	740	:	797	550	89	626	9	244	108	170	41	77	1 423
Value added (million EUR)	1 930	1 252	12 456	:	10 497	13 750	1 199	10 931	261	4 334	2 171	1 394	1 021	1 862	23 569
Purchases of goods and services (million EUR)	5 087	1 979	14 416	:	16 809	17 997	2 604	23 520	275	6 021	2 487	3 582	1 864	3 214	33 996
Personnel costs (million EUR)	1 116	867	6 807	:	6 243	10 293	636	5 269	158	2 442	1 361	1 014	758	1 411	13 943
Gross investment in tangible goods (million EUR)	555	257	921	:	1 356	2 528	208	1 949	:	361	266	314	96	288	5 417
App. labour productivity (thous. EUR/pers. emp.)	14.1	17.6	16.8	:	13.2	25.0	13.4	17.5	27.6	17.7	20.1	8.2	24.9	24.3	16.6
Wage adjusted labour productivity (%)	116.8	126.0	146.0	:	114.4	113.9	151.3	100.4	130.7	145.3	122.8	101.8	119.6	114.7	155.7
Gross operating rate (%)	11.5	12.4	21.4	:	15.6	10.8	14.8	16.8	18.8	18.2	17.1	7.7	9.3	9.1	16.3

(1) 1999. (2) 1998.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).

Table 19.19

Activities of travel agencies and tour operators; tourist assistance activities n.e.c. (NACE Group 63.3)
Main indicators, 2000

	B	DK	D	EL	E	F	IRL (1)	I	L	NL	A	P	FIN	S	UK
Number of enterprises (units)	1 332	564	7 400	:	5 897	4 303	303	8 902	111	2 245	1 253	978	745	2 227	6 555
Turnover (million EUR)	4 546	2 186	19 442	:	10 858	11 296	1 124	10 683	227	4 240	3 215	1 915	1 061	4 380	50 988
Number of persons employed (thousands)	9	6	80	:	41	42	3	41	1	25	10	7	5	14	128
Value added (million EUR)	283	201	5 490	:	1 131	1 646	88	1 305	40	655	352	153	174	458	5 312
Purchases of goods and services (million EUR)	4 265	2 004	14 344	:	9 772	9 819	1 036	9 403	186	3 614	2 862	1 769	908	3 977	45 649
Personnel costs (million EUR)	230	180	2 101	:	769	1 400	55	828	17	502	280	109	142	415	3 457
Gross investment in tangible goods (million EUR)	68	12	207	:	102	159	8	77	:	68	63	42	13	44	701
App. labour productivity (thous. EUR/pers. emp.)	32.1	35.0	68.7	:	27.3	38.8	26.5	32.2	60.8	25.9	33.9	20.5	33.1	33.2	41.5
Wage adjusted labour productivity (%)	102.6	109.7	239.0	:	135.5	117.2	148.6	115.1	213.2	116.3	115.1	130.7	119.0	100.8	147.3
Gross operating rate (%)	1.2	0.9	17.4	:	3.3	2.2	2.9	4.5	10.0	3.6	2.2	2.3	3.0	1.0	3.6

(1) 1998.
Source: Eurostat, Structural Business Statistics (theme4/sbs/enterpr/enter_ms).