

# Statistics in focus

## INDUSTRY, TRADE AND SERVICES

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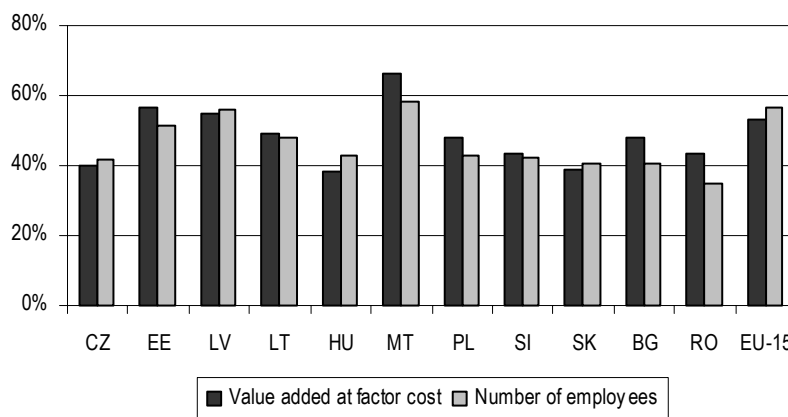
# Distributive trades and services in the new Member States and Candidate countries

This publication provides an overview on distributive trades and services activities in the ten New Member States and two Candidate countries (Bulgaria and Romania). Distributive trades correspond to Section G of the NACE Rev. 1 classification, while services refer to: Hotels and restaurants (Section H), Transport, storage and communication (Section I), Real estate, renting and business activities (Section K). Financial intermediation (Section J) is not included in services for this publication.

It should be noted that data for Hungary cover only enterprises with five or more persons employed, and that they are therefore not fully comparable with those of the other countries.

Graph 1 below shows the proportions of the above-mentioned activities in the total private non-agricultural sector, which comprises in addition to trade and services, industry and construction (NACE Rev. 1 Sections C to F).

**Graph 1: Value added and employment in trade and services  
as % of total private sector, 2001**



CY: data not available;  
CZ: provisional data;  
MT, EU-15: value added and number of employees for Electricity, gas and water supply (NACE Rev. 1 section E) used for the calculation of the total private sector refer to 2000.

Taking into account the sectors considered, a comparison with the EU-15 average shows that, in 2001, the economies of most of the New Member States and Candidate countries were relatively more industry-based, with trade and services accounting for less than half of the total private sector.

Only Estonia, Latvia and Malta saw a pattern similar to that of the EU-15 with trade and services being more important than industrial activities. Malta stood out from the other countries, with trade and services accounting for more than 66% of the total value added and for about 58% of total employment, which can be explained by the importance, in this country, of tourism-related activities.

## Trade largely dominates employment, females still a minority

Values in Table 1 show that in 2001 employment - measured in terms of number of employees - was significantly higher in distributive trades than in other services. In Lithuania, Latvia and Romania distributive trades were responsible for more than half of the overall

employment in the sectors observed, and in all the other countries - except Malta - such activity reached shares higher than 40%. In Malta distributive trade accounted "only" for 29% of the sectors' employment because of the greater importance of hotels and

restaurants, which provided jobs for over 14 600 employees.

Hotels and restaurants were also relatively important for employment in Slovenia (12%), while in all the other countries their share did not exceed 10%.

**Table 1: Number of employees in trade and services, 2001**

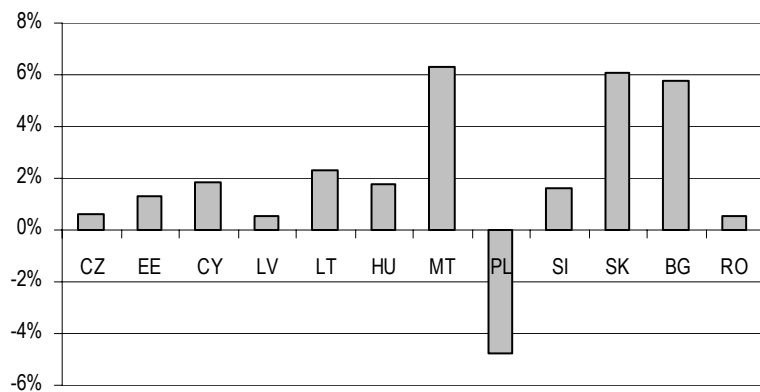
	CZ	EE	CY	LV	LT	HU	MT	PL	SI	SK	BG	RO
Distributive trades	498 110	83 464	45 030	138 966	169 357	292 229	16 578	1 099 795	101 615	157 341	222 722	684 952
Hotels and restaurants	113 522	12 844	27 779	16 821	22 169	57 433	14 689	109 992	27 842	20 201	53 608	73 371
Transport, storage and communication	299 110	42 249	19 389	70 332	83 735	214 598	12 324	581 638	51 134	116 204	163 774	360 856
Real estate, renting and business activities	268 086	39 167	10 508	51 253	43 734	144 749	7 150	533 672	51 579	86 944	84 452	188 750
<b>Total distributive trades and services</b>	<b>1 178 828</b>	<b>177 724</b>	<b>102 706</b>	<b>277 372</b>	<b>318 995</b>	<b>709 009</b>	<b>50 741</b>	<b>2 325 097</b>	<b>232 170</b>	<b>380 690</b>	<b>524 556</b>	<b>1 307 929</b>

CZ: provisional data; CY: data do not comprise Real estate activities (NACE Rev. 1 Division 70).

The level of employment in trade and services increased between 2000 and 2001 in all the New Member States and Candidate countries except Poland (see Graph 2).

Despite the general growth, however, women working in trade and services were still a minority and in 2003 there were no remarkable disparities across most of the countries, with female employment generally accounting for 44% - 47% (see Table 2).

**Graph 2: Growth of the number of employees in trade and services, 2000-2001**



CZ: provisional data.

**Table 2: Proportion of female and self-employment in total employment in trade and services, 2003 (4<sup>th</sup> quarter)**

	CZ	EE	CY	LV	LT	HU	MT	PL	SI	SK	BG	RO
Female employment (as % of total employment)												
Distributive trades	51.5	60.5	45.0	64.3	52.2	50.8	28.6	51.4	54.3	57.5	49.5	54.3
Hotels and restaurants	54.6	83.3	55.2	78.6	80.0	59.6	30.8	68.3	58.3	60.7	60.9	62.4
Transport, storage and communication	31.1	30.4	35.3	30.1	26.0	28.0	23.1	25.0	20.3	26.9	28.4	25.7
Real estate, renting and business activities	44.9	46.2	50.0	37.5	48.9	46.0	37.5	39.7	45.3	40.2	46.7	38.4
<b>Total distributive trades and services</b>	<b>45.5</b>	<b>51.0</b>	<b>46.9</b>	<b>51.4</b>	<b>47.4</b>	<b>45.4</b>	<b>29.1</b>	<b>44.4</b>	<b>45.5</b>	<b>47.4</b>	<b>45.8</b>	<b>45.4</b>
Self-employment (as % of total employment)												
Distributive trades	26.8	12.3	30.0	9.1	21.1	20.6	38.1	25.0	7.8	18.8	22.6	14.1
Hotels and restaurants	20.7	:	17.2	:	:	15.1	7.7	15.2	11.1	13.1	13.3	11.1
Transport, storage and communication	12.1	:	11.8	5.8	:	10.7	8.3	15.3	10.3	8.3	8.7	8.9
Real estate, renting and business activities	36.9	15.4	27.3	12.5	14.9	26.6	25.0	19.1	21.2	22.3	17.2	6.8
<b>Total distributive trades and services</b>	<b>24.4</b>	<b>:</b>	<b>24.2</b>	<b>:</b>	<b>:</b>	<b>18.9</b>	<b>22.2</b>	<b>21.1</b>	<b>11.5</b>	<b>16.1</b>	<b>17.2</b>	<b>11.8</b>

CY: data refer to the 2nd quarter; MT, SI: data refer to the 3<sup>rd</sup> quarter.

Only in Estonia and Latvia were more than half of the workers women, while Malta was at the other end of the scale with a proportion of females well below the average of the other countries, at 29%. Most women were employed in distributive trades and especially in hotels and restaurants. In particular, in the Baltic area more than 78% of

the persons working in hotels and restaurants were women. The lowest proportions of female employment were recorded in transport, storage and communication: only in Cyprus, the Czech Republic, Estonia and Latvia was the proportion higher than 30%.

Values in Table 2 also show that less than a quarter of the workers in

distributive trade and services were self-employed, and that particularly low shares of self-employment in total employment were recorded in Romania and Slovenia (below 12%). Across the activities, the highest number of self-employed people worked in distributive trades or in real estate, renting and business activities.

## Trade is not the most important sector in all countries for production value

In 2001 distributive trades was not only the most important activity for employment in trade and services, but also took the largest share in turnover (Table 3), which ranged from 60% in Malta to 76% in Lithuania.

The large proportion for distributive trades is expected, given that the turnover includes the value of the goods sold, which is the core of this activity. The distributive trades are where the largest differences between turnover and production can be found. This is due to the fact that production is measured by subtracting (among other figures) the purchases of goods and services for resale, whose

importance in distributive trades is much larger than in the other activities considered.

Values in Table 4 show that, when the production value is considered, the proportions of the distributive trades generally dropped to 32% - 46%, and that this activity was not always the most significant.

Only in Malta, the distributive trades' contribution to production was lower, at 24%. As in the case of employment, this is partly explained by the importance, in this country, of hotel and restaurants, which took a share of 20% (in all the other countries the proportion did not exceed 7%). In Malta, as well as in

Estonia and Bulgaria, transport, storage and communication services were the activities that accounted for the largest part of the production value of trade and services, with shares ranging between 40% and 49%. In all the other countries these activities were second in terms of contribution to the production value (with 24% - 37% shares).

As for real estate, renting and business activities, their contribution to the production value varied from less than 16% (Bulgaria, Lithuania, Malta) to over 27% (the Czech Republic and Poland).

**Table 3: Turnover in trade and services, 2001 (million euro)**

	CZ	EE	CY	LV	LT	HU	MT	PL	SI	SK	BG	RO
Distributive trades	67 189	7 577	7 925	8 843	9 867	38 553	2 840	169 642	15 858	16 627	14 412	30 245
Hotels and restaurants	2 684	215	1 592	212	199	1 071	444	3 085	814	254	543	742
Transport, storage and communication	14 636	2 666	1 503	2 191	2 042	8 743	995	26 691	3 236	3 131	3 985	6 332
Real estate, renting and business activities	12 271	1 167	698	1 080	886	6 674	421	27 531	3 124	2 595	999	2 717
Total distributive trades and services	96 780	11 624	11 718	12 326	12 994	55 041	4 699	226 948	23 031	22 607	19 939	40 037

CZ: provisional data; CY: data do not comprise Real estate activities (NACE Rev. 1 Division 70).

**Table 4: Production value in trade and services, 2001 (million euro)**

	CZ	EE	CY	LV	LT	HU	MT	PL	SI	SK	BG	RO
Distributive trades	14 334	1 697	1 919	2 349	2 522	7 434	604	40 096	4 676	4 058	2 704	7 346
Hotels and restaurants	2 396	199	1 568	206	179	824	501	2 211	792	227	405	530
Transport, storage and communication	12 087	2 431	:	2 139	2 034	6 343	1 014	20 846	3 166	2 962	3 860	6 192
Real estate, renting and business activities	11 099	1 008	676	1 070	832	4 125	386	23 705	2 690	2 339	958	2 522
Total distributive trades and services	39 916	5 336	:	5 764	5 567	18 726	2 505	86 857	11 323	9 586	7 926	16 590

CZ: provisional data; CY: data do not comprise Real estate activities (NACE Rev. 1 Division 70) PL: data refer to the year 2000.

## Cyprus, Malta and Slovenia generally ahead for production value and unit labour costs

A look at the data on the production value per employee (in 2001) highlights that transport, storage and communication and real estate, renting and business activities generally recorded the highest values, but there were some disparities from country to country.

As the statistics on production value used in this publication are not corrected for differences in price levels between the countries, a comparison of this indicator across these countries needs to be done with the necessary caution. On the basis of the figures presented no definitive conclusions as to the productivity in these countries should be drawn.

Malta ranked on top of the scale for transport, storage and communication, at 82 300 euro per employee, Estonia and Slovenia followed at some distance (around 60 000 euro per employee).

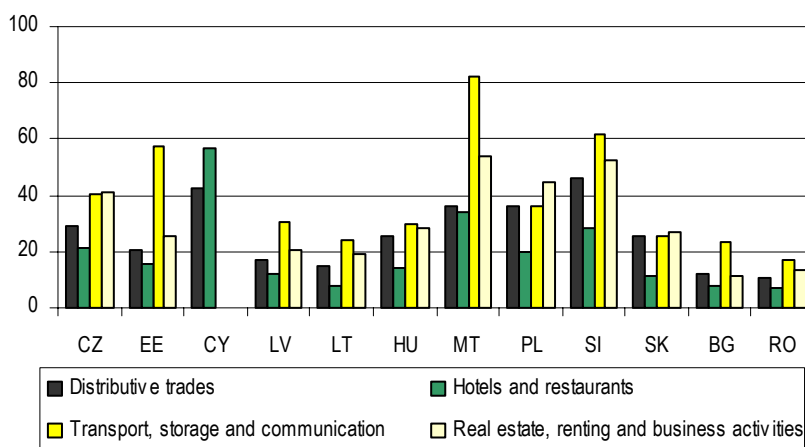
Malta and Slovenia also held the top positions for real estate, renting and business activities, at 54 000 and 52 100 euro per employee respectively.

Employees in hotels and restaurants were those that generated - in all the countries observed except Cyprus - the lowest production value per head.

Cyprus also stood out from the other countries for the high production value of distributive trades.

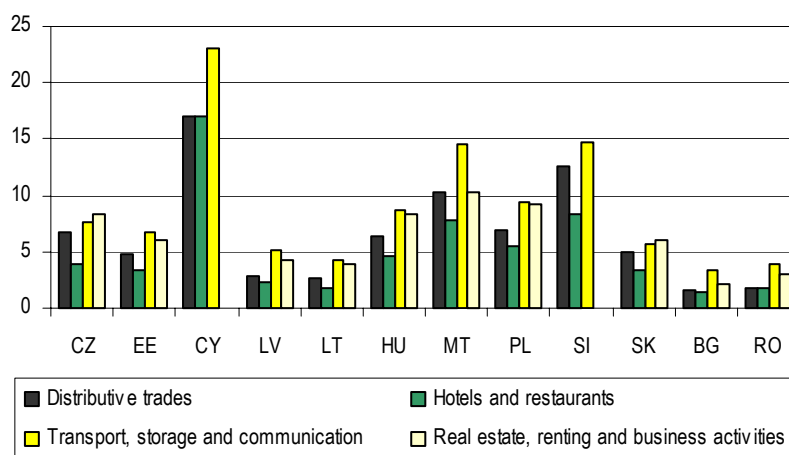
Considering the unit labour costs of trade and services (Graph 4), the pattern was not remarkably different than for the production value per employee. Transport, storage and communication recorded the highest values in most of the countries for which the complete set of data is available, reaching nearly 23 000 euro per employee in Cyprus and nearly

**Graph 3: Production value per employee in distributive trade and services, 2001 (1 000 euro)**



CZ: provisional data.

**Graph 4: Unit labour cost in distributive trade and services, 2001 (1 000 euro)**



CZ: provisional data;

CY, SI: data not available for services NACE Rev. 2 Section K.

15 000 euro in Malta and Slovenia. Real estate, renting and business activities ranked top for unit labour costs in the Czech Republic and in Slovakia (and ranked second in all the other countries).

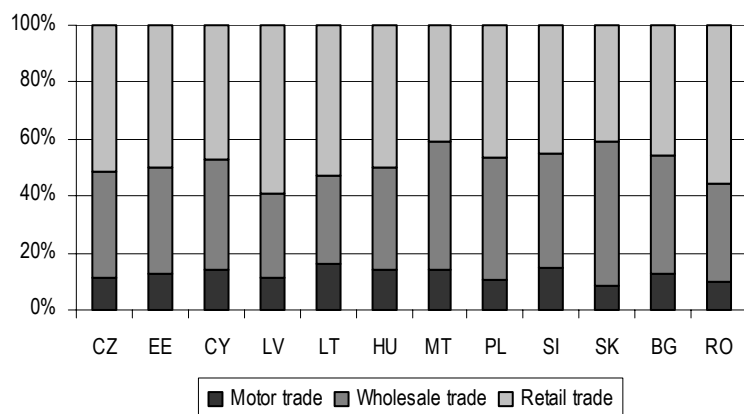
Across all the countries (except Romania) the unit labour costs of distributive trades were third in the ranking of the activities, while hotels and restaurants had the lowest values (this activity also had the lowest values for production value per employee). The disparities across the labour costs of the various activities obviously reflect the

specific characteristics of each type of service, and therefore the level of specialisation of the labour force employed.

Workers in distributive trades, hotels and restaurants are often less trained than those engaged in activities such as communication or business services, which often require more highly trained and specialised staff (and are therefore more expensive). Distributive trades, hotels and restaurants also employ, in general, more part-time workers than the other service sectors.

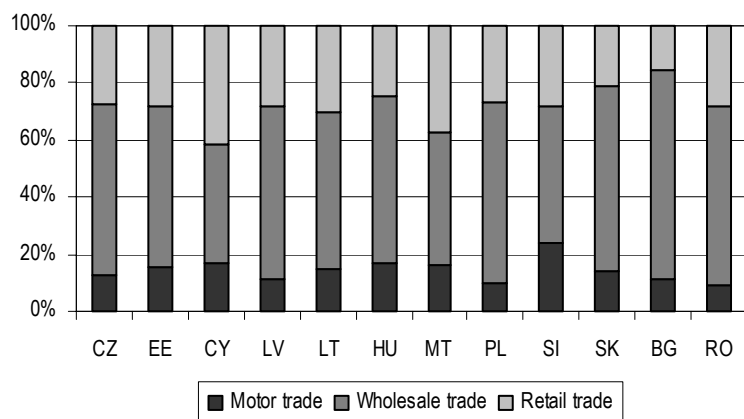
## Distributive trades: wholesale first for turnover, retail leads employment

**Graph 5: Number of employees in distributive trades by activity, 2001**



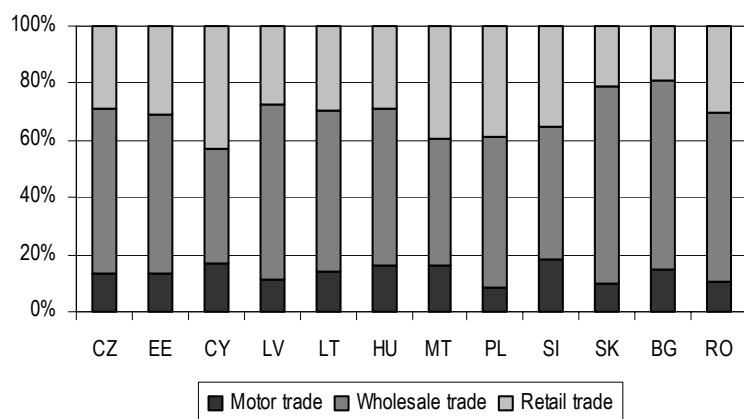
CZ: provisional data.

**Graph 6: Turnover in distributive trades by activity, 2001**



CZ: provisional data.

**Graph 7: Production value in distributive trades by activity, 2001**



CZ: provisional data.

Considering the importance of distributive trades for employment and turnover, it is worthwhile to highlight its three activities, with reference to the year 2001.

The breakdown of the number of employees (Graph 5) shows that the lion's share of employment was held by retail trade: in several countries it accounted for more than half of total distributive trade employment, and reached the highest proportion in Latvia, at 59%.

In all countries except Malta and Slovakia, wholesale trade's proportion of total employment was always lower than for retail trade, and generally stood between 35% and 45%.

Motor trade accounted for the smallest proportion of employment, at between 8% and 16%. This activity also accounted for the smallest part of distributive trades turnover and production value (Graphs 6 and 7), but for these variables the percentages were generally higher than those for employment. This discrepancy derives from the high unit value of the goods dealt with in the motor trade.

Values in Graphs 6 and 7 also show that there are no significant differences between the breakdown of turnover and that of production value. The highest shares of production value were clearly those for wholesale trade, which generally exceeded 50% (and in some countries reached 60% or more).

The opposite patterns for wholesale trade (first for turnover and production value) and retail trade (first for employment) derive directly from the characteristics of the trades themselves: wholesalers operate with large quantities of goods (even if with a low unit value), while retailing is much more labour-intensive and the turnover and production values generated by each worker is therefore lower.

## Real estate activities more important in the Baltic area and Poland than in the other countries

Real estate, renting and business activities, break down into five groups of activity.

Values in Table 5 show that Real estate activities accounted for about one third of this Section's total production value in the Baltic countries and Poland, and were more important in this area than in the other countries.

In all the countries, the largest contribution to the total production

value was provided by the services classified under "Other business activities".

The highest shares were recorded in Bulgaria and Slovenia (over 74%), while the lowest was in Latvia (nearly 46%).

Computer and related activities accounted for around 12-13% of the production value in most countries; but were relatively more important in Hungary (18.1%) and Slovakia

(15.9%).

The lowest contributions were those of Renting activities, which recorded the highest share in Malta (9.4%), and those of Research and development.

The latter accounted for less than 3% in all countries except Poland, Slovakia (4.3% and 4.8%), and Romania (outstanding at 8.4%).

**Table 5: Production value in real estate, renting and business activities by activity (%), 2001**

	CZ	EE	CY	LV	LT	HU	MT	PL	SI	SK	BG	RO
Real estate activities	15.3	32.2	:	37.5	34.0	18.6	22.0	31.4	6.4	20.7	10.3	11.3
Renting	2.6	3.3	:	3.1	2.7	4.4	9.4	5.0	0.6	4.3	1.6	3.8
Computer and related activities	12.8	8.4	:	11.2	11.6	18.1	13.5	9.4	12.5	15.9	12.3	11.7
Research and development	1.3	0.2	:	2.6	0.9	2.8	0.1	4.3	2.2	4.8	1.0	8.4
Other business activities	68.0	55.9	:	45.6	50.8	56.1	55.0	50.0	78.4	54.3	74.9	64.9
<b>Total</b>	<b>100.0</b>	<b>100.0</b>	<b>:</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>	<b>100.0</b>

CZ, PL: provisional data.

## Other variables on distributive trades and services

**Table 6: Other variables by activity, 2001**

	CZ	EE	CY	LV	LT	HU	MT	PL	SI	SK	BG	RO
Number of enterprises (units)												
Distributive trades	205 514	12 346	17 785	18 275	27 222	17 793	12 096	589 115	40 536	15 465	120 947	192 579
Hotels and restaurants	42 580	1 337	7 103	1 876	2 906	4 016	875	51 645	11 292	1 161	23 248	10 464
Transport, storage and communication	40 828	2 330	4 933	2 717	6 398	3 095	2 029	147 533	12 821	1 531	35 233	15 564
Real estate, renting and business activities	200 543	6 677	:	5 561	8 102	7 892	6 280	250 801	24 133	8 494	20 641	23 950
Personnel costs (million euro)												
Distributive trades	3 353	394	770	383	465	1 863	170	7 559	1 284	779	345	1 205
Hotels and restaurants	442	43	472	39	40	263	116	595	234	69	72	136
Transport, storage and communication	2 295	284	445	362	362	1 860	180	5 516	753	669	566	1 389
Real estate, renting and business activities	2 245	235	:	220	172	1 211	73	4 903	672	531	179	583
Gross investment in tangible goods (million euro)												
Distributive trades	1 380	255	235	356	274	953	47	3 060	509	603	551	1 480
Hotels and restaurants	130	24	132	63	22	108	45	237	81	22	171	141
Transport, storage and communication	2 660	260	141	499	353	1 352	58	3 811	425	599	647	2 483
Real estate, renting and business activities	1 555	221	:	248	252	696	2 516	3 903	152	342	192	451

CZ: provisional data

CY: 2000 data for number of enterprises for Transport, storage and communication

PL: provisional data for Real estate, renting and business activities

SI: 2000 data on gross operating surplus and personnel costs for Real estate, renting and business activities

## ➤ ESSENTIAL INFORMATION – METHODOLOGICAL NOTES

### Databases

This Statistics in Focus (SiF) is based on structural business statistics collected under the terms of Council Regulation (EC, EURATOM) No 58/97 of 20 December 1996. The reference data are stored in Eurostat's reference database New Cronos.

Data on employment are also taken from the LFS (Labour Force Survey). These data are collected in accordance with Council Regulation N° 577/98 adopted in 1998, which replaced the previous Regulation to take account of new statistical requirements. The methodological basis and the contents of this new series of surveys are described in the publication entitled "Labour Force Survey - Methods and Definitions - 1998 edition".

The figures shown reflect the situation of the database as of April 2004.

### Data coverage and methodological remarks

The currency data are expressed in current euro and therefore do not fully reflect currency volatility, inflation rates and purchasing power.

There are still a number of discrepancies between the various new Member States and Candidate countries regarding the statistical population covered as well as the methodologies. In particular, data for Hungary cover only enterprises with five or more persons employed.

No data are available for those countries that are not shown in the graphs and tables.

### Symbols

Throughout the publication the sign “.” stands for “Not available”

### Statistical classification

The data are collected mainly on the basis of the Statistical Classification of Economic Activities in the European Community (NACE Rev. 1). This SiF deals with the following **Sections of the classification**: G (Distributive trades), H (Hotel and restaurant services), I (Transport, storage and communication services), and K (Real estate, renting and business services). For the purposes of this publication, the enterprise sector as whole covers, in

addition to the above-mentioned activities, the NACE Rev. 1 Sections C (Mining and quarrying), D (Manufacturing), E (Electricity, gas and water supply), and F (Construction).

The external trade of goods are collected on the basis of the Standard International Trade Classification (SITC Rev.3).

### SBS variables

#### Number of enterprises

A count of the number of enterprises registered to the population concerned in the business register corrected for errors, in particular frame errors. Dormant units are excluded.

#### Number of employees

The number of employees is 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.

#### Number of persons employed

The total number of persons who work in the observation unit (employees receiving remuneration, working proprietors and unpaid family workers) as well as outside working persons who belong to the unit and are paid by it. It includes all persons who are on the payroll of the enterprise, whether they are temporarily absent (excluding long-term absences), part-time, seasonal or home workers, apprentices etc.

#### Production value

The production value measures the amount actually produced by the unit, based on sales, including 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). Income and expenditure classified as financial or extraordinary in company accounts is excluded from production value. Included in purchases of goods and services for resale are the purchases of services

purchased in order to be rendered to third parties in the same condition.

#### Turnover

Turnover comprises the totals invoiced by the observation unit during the reference period, which corresponds to market sales of goods or services supplied to third parties. It includes all duties and taxes on the goods and services invoiced by the unit, with the exception of the VAT invoiced by the unit vis-à-vis its customers and other similar deductible taxes directly linked to turnover.

#### Value added at factor cost

Value added at factor cost is the gross income from operating activities after adjusting for operating subsidies and indirect taxes. It 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.

#### Personnel costs

Personnel costs are defined as the total remuneration, in cash or in kind, payable by an employer to an employee 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.

#### Unit labour cost

Unit labour cost is defined as personnel costs per employee.

*The above SBS variables are laid down in Commission Regulation (EC) No 2700/98 of 17 December 1998.*

More information on business statistics methodology can be found at:

<http://europa.eu.int/comm/eurostat/ramon/>

or

[http://forum.europa.eu.int/Public/irc/dsis/bm/ethods/info/data/new/main\\_en.html](http://forum.europa.eu.int/Public/irc/dsis/bm/ethods/info/data/new/main_en.html)

The above-mentioned Regulations and statistical classification can be downloaded under 'legal texts

# Further information:

## ➤ Databases

NewCronos, Theme 4

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