Statistics in focus

INDUSTRY, TRADE AND SERVICES



Author Gabriel Pi Soler

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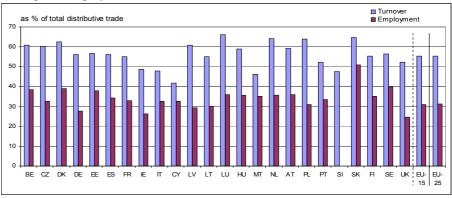


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Wholesale trade in the EU

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 (NACE group 51.1), who charge only for their service as intermediaries; and own-account wholesalers (NACE groups 51.2 to 51.7), also known as merchant wholesalers, who buy and resell products. These activities cover all wholesale trade except that concerning motor trade. 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.

According to the Structural Business Statistics (SBS), wholesale trade accounted in 2001 for nearly one third of total employment and more than half of the turnover in EU total distributive trades (Graph 1).



Graph 1: Employment and turnover in wholesale trade in Member States, 2001

EL: not available; SI: not available (only employment); PL: 1998 (only employment). Source: Eurostat, unless otherwise mentioned.

United Kingdom was in 2001 the main contributor to the value-added produced by wholesale trade in the EU, especially in the trade of household goods (NACE group 51.4) and of machinery and equipment (NACE group 51.6), two of the most important activities in wholesaling. Germany, though the least specialised Member State in wholesale trade, was the main contributor to the value-added produced in the trade of food, beverages and tobacco (NACE group 51.3) and of intermediate products (NACE group 51.5), two other important activities in wholesaling. Despite the relatively low importance of wholesaling on a fee (NACE group 51.1) in terms of value-added produced, it is to be noted that Italy was by far the biggest contributor in value-added in this group (Table 1).

Table 1: Importance of wholesale trade in the EU and Member States, 2001

		Total EU		Most	Least
	Total EU	value-		specialised	specialised
	employment	added (in	Main contributor	Member	Member
Sector	(in 1000)	bn EUR)	to value-added	State	State
Wholesale on a fee (51.1)	827.9	31.4	Italy	Slovakia	Latvia
Agricultural raw materials (51.2)	314.8	12.6	France	Netherlands	Estonia
Food, beverages and tobacco (51.3)	1 523.0	64.5	Germany	Malta	Slovenia
Household goods (51.4)	1 846.4	95.4	United Kingdom	Portugal	Slovenia
Intermediate products (51.5)	1 704.2	90.6	Germany	Latvia	Malta
Machinery and equipment (51.6)	1 536.0	90.2	United Kingdom	Denmark	Slovenia
Other w holesale (51.7)	669.3	28.4	Poland	Poland	Sw eden
Wholesale trade (51)	8 421.7	413.2	United Kingdom	Poland	Germany
Wholesale and retail trade (G)	26 980.8	879.3			
Total enterprise sector (C to K excl. J)	105 192.5	4 584.0			

Notes: EL: not available; SI: not available (only employment); PL: 1998 (only employment).

Most/least specialised Member State: see methodological notes for details.

Wholesale trade activities in the EU

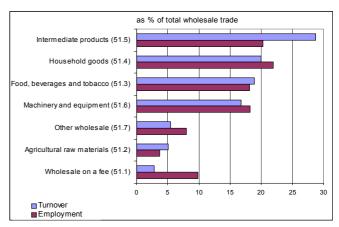
Regarding the relative importance of each wholesale activity in total wholesaling, four activities were dominant in 2001, accounting together for 84% of turnover and 78% of employment in the sector. The wholesaling of intermediate products (NACE group 51.5) had the largest level of turnover, accounting for 29% of wholesaling turnover. 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 employment shares of these four wholesaling groups presented a different picture, notably less importance for wholesaling of intermediate products and a higher share for household products (Graph 2).

Wholesaling on a fee or contract basis (group 51.1), by its very nature, accounted 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. Thus they accounted only for 3% of total wholesale turnover in spite of their relatively high

According to available data on wholesale value-added, there was faster growth in own account wholesaling than in wholesaling on a fee or contract basis (Table 2). For the 14 countries with reported data, there was a decline in wholesaling on a fee or contract basis in share in employment (10%).

The other two groups each accounted for approximately 5% of the total turnover and for 4-8 % of the total employment.

Graph 2: Distribution of turnover and employment in wholesale trade in the EU, 2001





agricultural raw materials and intermediate products. On the other hand, wholesaling machinery and equipment grew more for intermediaries than for own account wholesalers.

	Wholesale on a fee or o	contract basis	Own account wh	olesaling
Sector	NACE	Rate of change (%)	NACE	Rate of change(%)
Agricultural raw materials	51.11	-23.0	51.2	11.2
Food, beverages and tobacco	51.17	11.9	51.3	19.4
Household goods	51.15 + 51.16	1.6	51.4	16.5
Intermediate products	51.12 + 51.13	-2.2	51.5	17.2
Machinery and equipment	51.14	31.3	51.6	11.0
Other	51.18 + 51.19	19.9	61.7	52.6
Total	51.1	14.2	51.2 to 51.7	18.0

Table 2: Rates of change of value-added of wholesale trade in the EU(1), 1999 to 2001

Notes: (1) Based on data from BE, DK, ES, IT, HU, NL, AT, PL, PT, SI, SK, FI, SE, UK.

BE: Nace 51.18 & 51.19 not available (2001).

In 2001, own-account wholesaling (NACE groups 51.2 to 51.7) accounted for 92% of the EU's wholesale valueadded and 90% of its employment. In fact, these proportions were higher in nearly all Member States. Wholesaling on a fee or contract basis accounted for more than 25% of wholesale value-added only in Italy, Slovenia and Slovakia. Moreover, Italy and Slovakia were the only Member States to count at least 30% of intermediaries in their total employment in wholesale trade. Nevertheless, Italy influenced the EU figures since it was by far the main contributor to value-added and employment in wholesaling on a fee or contract basis (Table 3).





				DE	EE	ES	FR	IE	IT	CY	LV	LT	LU	HU	МТ	NL	AT	PL	PT	SI	SK	FI	SE	UK	EU-15	EU-25	NO	BG	RC
/holesale on a fee or contra	act basis	(NACE	51.1)																										
umber of enterprises alue added at factor cost	10084	23172	1340	36663	1295	48811	40894	629	255917	367	170	879	591	734	949	4475	4927	18104	12702	13157	3625	4097	3778	16373	441281	503733	2154	1761	1 117
nio EUR)	548	226	407	3501	34	2208	4598	80	10877	54	3	10	53	131	27	1122	446	834	357	276	243	283	466	4646	29594	31433	230	26	22
ersonnel costs (million EUR)	241	147	240	1024	17	647	3068	43	973	38	1	3	17	71	9	577	219	180	178	190	126	160	300	2193	9879	10660	144	8	40
umber of persons employed housands)	14,9	33,8	6,6	79,0	4,4	71,1	74,8	2,7	333,2	1,7	0,3	3,2	0,7	10,2	1,6	14,2	9,6	34,7	23,3	:	25,2	5,5	9,7	67,4	712,8	827.9 ²	4,2	5,8	31
pp. labour productivity hous.EUR/pers.emp.)	36.7	6.7	61.3	44.3	7,8	31.0	61.4	29.4	32.6	32.4	11,9	3.2	80.7	12.8	17.4	79.1	46.3	24.0	15.4		9.6	51.9	48.0	68,9	41.5	37.6 ²	54.4	4,5	7.
abour costs	/		- /-										/		,		- / -		- /		- 7 -						54,4		
hous.EUR/employee)	53,0	12,2	40,9	25,6		24,9	42,6	22,3	26,5	23,7	2,2	1,3	40,6	7,0		50,4	44,5	10,2	14,7	13,3	5,2	37,0	39,7	42,5	35,2	29,1	:	2,7	1,
urnover (mio EUR)	6708	1537	2426	5114	251	3587	94957	283	22932	104	10	43	293	1810	117	3862	1028	4108	2106	1908	2946	952	2799	15091	162138	174970	502	100	140
wn-account wholesaling (N	IACE Gro	oups 51.	2 to 51.7	7)																									
umber of enterprises	34115	29937	14885	58179	4334	140071	124177	4048	163595	1874	4658	5992	2713	5146	1987	50495	14742	99837	35417	8337	5922	11772	37915	99775	791899	959923	15775	18857	7 379
alue added at factor cost	13619	3234	9579	65120	359	30959	50476	3601	32639	500	913	465	979	1620	213	28296	11438	24971	6610	582	651	5097	10835	79024	348271	381778	5947	505	146
ersonnel costs	8263	1580	6555	40185	167	17869	36152	2112	14861	278	161	196	456	834	77	16527	7024	3895	3539	394	327	3101	7952	40777	205372	213282	4715	165	49
umber of persons employed	215,9	205,4	166,6	1130,8	28,9	897,7	949,3	58,9	721,5	16,2	40,9	53,2	13,2	96,2	7,9	476,9	191,3	580,6	228,4	:	56,6	79,6	208,0	1169,9	6507,9	7593.8 ²	104,6	108,2	2 239
pp. labour productivity	63,1	15,7	57,5	57,6	12,4	34,5	53,2	61,1	45,2	30,9	22,3	8,7	74,4	16,8	27,1	59,3	59,8	43,0	28,9	:	11,5	64,0	52,1	67,5	53,5	50.2 ²	56,8	4,7	6,
abour costs	45,5	9,1	40,9	37,7	6,1	22,2	38,6	38,0	30,1	17,6	4,0	3,8	37,9	8,7	11,5	37,9	38,8	8,6	16,6	14,8	5,9	39,9	42,0	37,2	34,5	31,1	:	1,8	2,
urnover (mio EUR) 1	152133	39014	77373	592134	4044	293275	457249	30197	302978	3199	5379	5385	12770	20880	1194	257382	87684	104094	57376	5627	7825	46237	90861	622209	3079857	3276497	58833	10457	7 174
holesale trade (NACE 51)																													
urnover (mio EUR) 1	158841	40551	79799	597248	4295	296862	552206	30480	325910	3303	5389	5428	13063	22690	1310	261244	88713	108202	59482	7535	10771	47189	93660	637300	3241995	3451468	59335	10557	7 189
holesale and retail trade (N	IACEG)	6												<u>.</u>															
urnover (mio EUR) 2	260937	67189	127800	1065620	7577	527637	1002408	62523	680994	7925	8843	9867	19750	38553	2840	406381	150113	160642	113561	15858	16627	85148	165543	1218683	5887108	6232026	106653	14412	2 302

Turnover (mio EUR)
617899
184953
314785
3635995
17626
1397174
2729611
203859
2105762
15818
17985
21923
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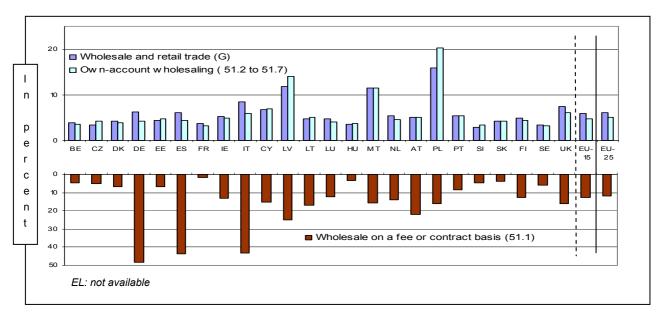
Notes: EL not available; SI not available (employment); PL: 1998 (employment); NO not available (labour costs)
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1: CY nace K, MT nace E, IE naces E & F not available

2: SI not included in the aggregate

In 2001, gross operating rate (value added minus personnel costs in turnover) for wholesaling in Europe was highest in Poland (20%), Latvia (14%), Malta (12%) and Italy (8%). With regard to the importance of each wholesale activity, wholesaling on a fee or contract basis had a far higher operating rate than the other wholesaling activities, for which the rate was very close to that registered for total distributive trades (Graph 3). however, unsurprising considering that This is, wholesale intermediaries generate low turnover,

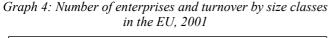
including only their services and not the value of the goods involved. The operating rate for wholesaling on a fee or contract basis was, at over 40%, particularly high in Germany, Spain and Italy, where the number of wholesale intermediaries is very large compared to the other Member States. France however registered the lowest operating rate in wholesaling on a fee or contract basis (only 1.6%), despite the large number of wholesale intermediaries, partly reflecting the weight in this sector of the central purchasing offices.

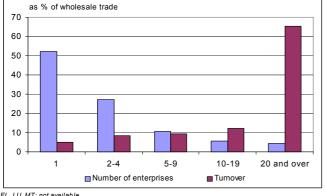


Graph 3: Gross operating rate by activities in Member States, 2001

An activity shared by small and large enterprises

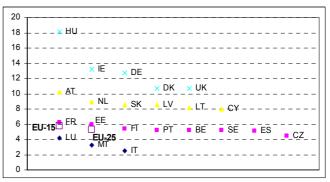
Wholesale trade is both composed of very large enterprises and of a population of small and very small enterprises: 4% of the wholesale trade companies (i.e. those employing 20 persons and over) accounted for half of the persons employed in the sector and totaled 65% of turnover in 2001 (Graph 4). On average, EU wholesale enterprises had 5 persons employed. The only countries with a number of persons employed per company higher than 10 were Denmark, Germany, Ireland, Hungary and the United Kingdom. On the other hand, Italy, Luxembourg and Malta had the lowest number of persons employed per company with an average lower than 4 (Graph 5).





EL, LU, MT: not available

Graph 5: Average number of persons employed by enterprise in Member States, 2001

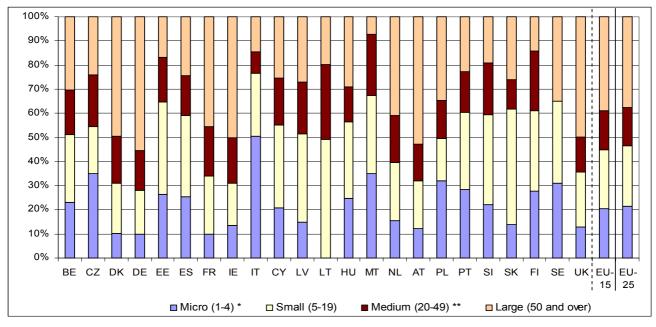






Large enterprises (with at least 50 persons employed), accounted for 37.7% of employment in EU wholesale trade in 2001, the largest share among the four size classes considered. Small enterprises (with between 5 and 19 persons employed) accounted for the second largest share of employment with 25.0%. The share of very small enterprises (with less than 5 persons employed) in wholesale trade employment, with 21.6% in the EU, varied greatly between Member States.

Indeed in Germany, France and Lithuania very small enterprises accounted for less than 10% of employment in wholesale trade while they accounted for at least 30% in the Czech Republic, Italy, Malta, Poland and Sweden (Graph 6). In fact, in Italy, over one quarter (26.2%) of the wholesale trade workforce worked alone, in enterprises with only one person employed. Italy has a large number of wholesale intermediaries in the sector, who work mostly as self-employed, with no employees.



Graph 6: Distribution of employment by size classes in Member States, 2001

EL, LU: not available; PL: 1998

* LT: nil values ** SE: not available due to confidentiality

According to preliminary data on turnover and employment, the average turnover per person employed in wholesale trade in the EU amounted to EUR 411 400 per person employed in 2002, while it only reached EUR 238 700 per person employed in total distributive trades. This rate was EUR 415 000 per person employed in EU wholesale trade in 2001. Furthermore, by distinguishing wholesale intermediaries and ownaccount wholesalers, it can be seen that in 2001 enterprises employing over 20 persons generated by far the highest rates of turnover per person employed in wholesaling on a fee, while in own-account wholesaling the difference was less significant. Furthermore, France generated by far the highest turnover per person employed in wholesaling on a fee, while in own-account wholesaling, this rate was highest in Belgium (Table 4).

In 1000 EUR

Table 4: Turnover per person employed in Member States, 2001

	BE	сz	DK	DE	EE	ES	FR	IE	IT	CY	LV	LT	HU	NL	AT	ΡT	SI	SK	FI	SE	UK	EU-15	EU-25
Wholesale of	on a fee	e or col	ntract k	basis (5	1.1)																		
Total	449,1	45,4	365,4	64,7	56,8	50,4	1268,7	103,6	68,8	62,3	37,0	13,7	177,2	281,5	106,8	90,4	128,4	117,0	174,5	288,0	223,8	226,6	216,8
1 - 4	153,8	29,1	359,4	58,0	61,9	44,3	764,2	86,3	56,7	61,5	48,1	5,0	113,8	313,6	73,8	57,4	101,0	72,0	109,7	181,1	178,6	94,1	85,9
5 - 19	969,3	57,3	459,3	70,0	53,9	84,8	1501,9	135,1	141,7	63,4	:	16,6	123,3	328,8	136,4	132,0	179,0	84,6	379,6	414,9	231,6	399,8	329,7
20 - 49	343,8	120,3	253,1	40,6	:	73,3	2039,7	:	324,4	61,5	:	18,6	93,8	211,7	177,4	162,9	160,2	284,9	337,3	373,0	245,1	852,0	711,3
50 and over	171,7	190,6	600,0	215,0	:	53,3	816,4	:	686,3	:	:	20,2	809,6	497,7	245,5	336,2	125,5	151,9	115,6	334,3	414,4	663,7	686,3
Own-accou	nt whol	esaling	g (51.2 i	to 51.7)																			
Total	704,6	190,0	464,5	523,7	140,1	326,7	481,7	512,7	419,9	197,8	131,4	101,2	217,0	546,1	458,4	251,2	206,8	138,2	580,9	436,9	531,9	472,9	465,2
1 - 4	689,9	113,7	662,6	443,1	107,2	238,5	496,4	324,7	297,9	140,4	105,9	108,4	227,5	521,1	589,9	157,6	156,6	86,3	438,3	237,9	455,1	378,9	373,2
5 - 19	692,6	152,3	432,4	438,2	112,8	249,1	397,9	476,1	329,6	181,9	131,7	79,3	206,9	377,7	472,0	210,0	165,1	118,2	465,0	367,3	427,8	371,6	360,4
20 - 49	619,9	252,0	438,4	423,9	158,8	334,8	497,8	505,6	494,1	200,7	129,8	109,9	187,3	495,0	492,3	233,7	176,9	176,5	430,8	438,4	512,2	454,9	447,
50 and over	913,0	244,3	433,4	576,8	177.0	422,4	505,3	614,8	573,8	319,6	164,9	130,0	246,7	706,7	471,5	371,2	291,9	174,3	739,5	503,8	598,8	597,1	557,9

Notes: EL, LU, MT, PL: not available

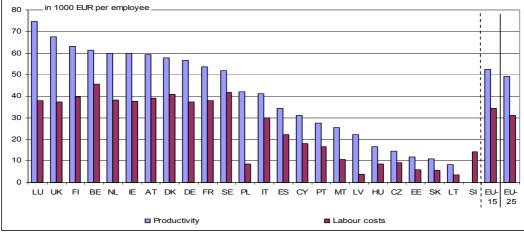


A relatively high productivity and qualification of wholesalers

The labour productivity (value-added per person employed) varies considerably across Member States. In 2001, Southern and Eastern European Member States recorded low values of productivity, while Belgium, Luxembourg, Finland and United-Kingdom came out top. The figures ranged from EUR 8 400 per person employed in Lithuania to EUR 74 700 in Luxembourg. On average, the labour productivity was higher in wholesale trade than in total distributive trades. Unit labour costs ranged from EUR 3 700 per

employee in Lithuania to EUR 45 700 in Belgium (Graph 7). The largest difference between value-added and labour cost per employee was recorded for Luxembourg and Poland.

Furthermore, the labour cost figures show that wholesalers operated with higher labour costs (EUR 31 000 per employee) than businesses in the motor trade (EUR 24 200 per employee) or retail trade (EUR 17 400 per employee).

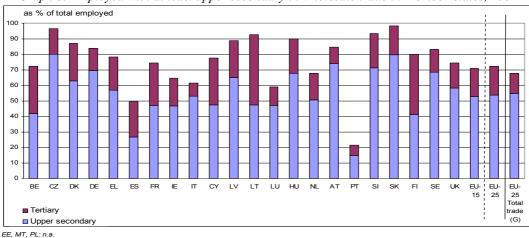


Graph 7: Productivity and labour costs in wholesale trade in Member States, 2001

EL: not available; FR: 2000 (Labour costs); SI: not available (Productivity); PL: 1998 (Productivity)

An explanation of the higher salaries on average of wholesalers may be found in the fact that persons employed in wholesaling need higher educational skills to be able to carry out the administrative tasks involved in wholesaling. Indeed, according to the EU Labour Force Survey (LFS), 54% of the total employed in wholesale trade in 2002 in the EU had upper secondary level educational qualifications and 19% had tertiary (or university degree) level qualifications. In total distributive trades, there was a similar proportion of

those employed with upper secondary education but the share employed with tertiary level qualifications was only 13%. Nevertheless, the distribution of the wholesale sector's workforce varies greatly across the Union. Thus Spain and Portugal recorded more than half of the total employed in wholesale trade with only basic schooling, while in the Czech Republic, Lithuania, Hungary, Slovenia and Slovakia, no less than 90% of the total employed in this sector had at least upper secondary education (Graph 8).



Graph 8: Employed with at least upper secondary in wholesale trade in Member States, 2002



LV, LU, PT, SI: uncertain data due to small sample size (tertiary level)

> ESSENTIAL INFORMATION - METHODOLOGICAL NOTES

ABBREVIATIONS

EU European Union, including the 25 Member States (BE, CZ, DK, DE, EE, EL, ES, FR, IE, IT, CY, LV, LT, LU, HU, MT, NL, AT, PL, PT, SI, SK, FI, SE, UK).

SYMBOLS

":" not available or confidential.

DEFINITIONS

Enterprise sector covers NACE sections C to K excluding J in this publication - which is the basic scope of the Structural Business Statistics.

Division of employment and value-added by sector of activity

Employment and value-added in the Structural Business Statistics (SBS) are divided into sectors of activity according to the NACE Rev. 1 system of classification. This categories activity by section (1-letter codes), subsection (2-letter codes), division (2-digit codes), groups (3-digit codes) and classes (4-digit codes). All wholesale and retail trade activities are included under Section G. Wholesale trade analysed in this publication includes the following divisions and groups:

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.

Number of persons employed: defined as the total number of persons who work in the observation unit (inclusive of working proprietors and 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 part-time workers, seasonal workers, apprentices and home workers who are on the pay roll. The observation unit for aggregating data is the enterprise, which is defined as *'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*'.

Turnover: Turnover comprises the totals invoiced by the observation unit during the reference period, and this corresponds to market sales of goods or services supplied to third parties.

Value-added: Value-added measured at factor cost, which is the gross income from operating activities after adjusting for operating subsidies and indirect taxes (including value-added tax).

Degree of specialisation: The most specialised Member State is the country for which the share of total wholesale and retail trade (Section G) value-added accounted for by wholesaling is highest in relation to the average share in the EU. The least specialised Member State is the country where this ratio is the lowest. It can be noticed that this indicator is very sensitive to the denominator, which corresponds to the value-added in Section G.

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 from work done by the latter during the reference period.

Apparent labour productivity: Value-added at factor cost/number of persons employed (expressed in thousand EUR per person employed).

Labour costs: Personnel costs/number of employees (expressed in thousand EUR per employee).

Gross operating rate: Gross operating surplus (surplus generated by operating activities after the labour factor input has been recompensed: it can be calculated from the value-added at factor cost less the personnel costs)/turnover (expressed in percent).

Educational attainment levels: Educational attainment levels are based on the International Standard Classification of Education (ISCED), as revised in 1997. This divides education into 7 main levels, grouped into three levels in the analysis:

lower secondary, defined as ISCED levels 0 to 2, pre-primary, primary and lower secondary education;

upper secondary, defined as ISCED levels 3 and 4, upper secondary and post-secondary, non-tertiary education;

tertiary, defined as ISCED levels 5 and 6, first stage of tertiary education and second stage of tertiary education.

The level upper secondary includes GSCE levels for UK.

The data are taken from the EU LFS, which classifies those employed to NACE 2-digit industries.

DATA SOURCES

Structural Business Statistics (SBS): collected within the framework of Council regulation on structural business statistics (EC, EURATOM) No. 58/97 of December 1996. The SBS Regulation governs the transmission of data to Eurostat from the reference year 1995 onwards and, in principle, covers all market activities in sections C to K and M to O of NACE Rev. 1, but, in practice, the data available are confined to NACE Rev. 1 sections C to K, excluding section J, financial services. For further information, visit:

http://forum.europa.eu.int/Public/irc/dsis/bmethods/info/data/n ew/main_en.html

The SBS data used in the analysis are taken from the SBS\ENTERPR\ENTER_TR and SBS\ENTERPR\PRELI series which cover all enterprises from 1995 onwards (though the data are less complete and less accurate for the years before 1999). The data available for Greece cover only enterprises with 20 persons or more employed and are, therefore, not included in these series. Survey from CZ designed only to be reliable at 2-digit level. The data used for the value-added by size of enterprise are taken from the SBS\SIZCLASS\TRADE series.

EU Labour Force Survey (LFS): a survey of private households which provides data on the population living in these by nationality and by work status as well as by sex and age. The main focus is on employment, unemployment and inactivity and the various aspects of these, including the sector of activity in which people are employed and the highest level of educational attainment reached.



Further information:

> Databases

NewCronos, Theme 4

To obtain information or to order publications, databases and special sets of data, please contact the Data Shop network:

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For information on methodology:

Gabriel Pi Soler, Eurostat / D3, L-2920 Luxembourg, Tel. (352) 4301 35422, Fax (352) 4301 32600,

E-mail: Gabriel.Pi@cec.eu.int

In collaboration with Nassima Hamzaoui and Maria Gonzalez.

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