

Statistics in focus

INDUSTRY, TRADE AND SERVICES

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Non-food retailing in Europe

Specialised retailers lead the sector
- Jan Stensrud

Main results

- Specialised businesses represent about 80% of enterprises, turnover and employment. Most of them are clothing retailers.
- Non-specialised stores and mail-order houses are generally larger, both in terms of turnover and employment.
- Dispensing chemists recorded the highest average turnover and the highest labour productivity amongst specialised retail trade enterprises.
- Low density and large enterprises in the United Kingdom and Germany, numerous small enterprises in Portugal and Italy.

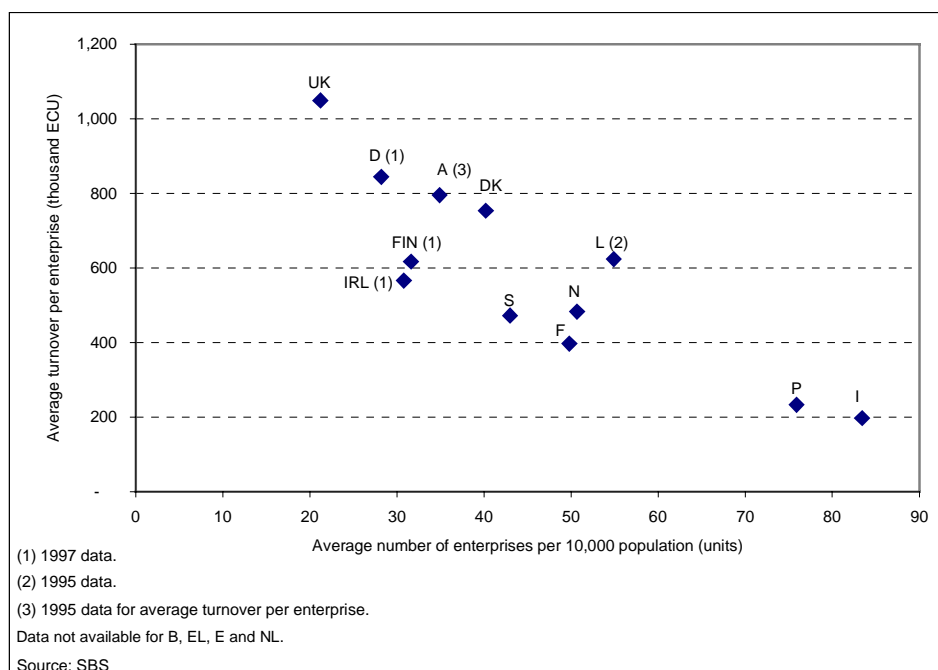


Figure 1: size and density of non-food retail enterprises, 1996

Activities covered in this publication:

- NACE Rev. 1 52.12: retail sale in non-specialised stores (food, beverages or tobacco not predominating);
- NACE Rev. 1 52.31: dispensing chemists;
- NACE Rev. 1 52.32: retail sale of medical and orthopaedic goods;
- NACE Rev. 1 52.33: retail sale of cosmetic and toilet articles;
- NACE Rev. 1 52.41: retail sale of textiles;
- NACE Rev. 1 52.42: retail sale of clothing;
- NACE Rev. 1 52.43: retail sale of footwear and leather goods;
- NACE Rev. 1 52.44: retail sale of furniture, lighting equipment and household articles n.e.c.;
- NACE Rev. 1 52.45: retail sale of electrical household appliances and radio and television goods;
- NACE Rev. 1 52.46: retail sale of hardware, paints and glass;
- NACE Rev. 1 52.47: retail sale of books, newspapers and stationery;
- NACE Rev. 1 52.48: other retail sale in specialised stores;
- NACE Rev. 1 52.5: retail sale of second-hand goods in stores;
- NACE Rev. 1 52.61: retail sale via mail order houses;
- NACE Rev. 1 52.62: retail sale via stalls and markets;
- NACE Rev. 1 52.63: other non-store retail sale.

Introduction

Sale of non-food items constitutes the prominent activity in EU retailing, accounting for more than two-thirds of the total number of businesses, 60% of employment and more than half of aggregated turnover. This publication provides for the first time a very detailed and extensive statistical coverage of this important activity in the EU and Norway.

The activities analysed include the retail sale of non-food items in a variety of specialised stores, as classified by NACE Rev. 1 Group 52.3 (pharmaceutical and medical goods, cosmetic and toilet

articles) and 52.4 (textiles, clothing, footwear and leather goods, furniture, lighting equipment and household articles, domestic appliances, hardware, paint and glass, books, newspapers and stationery). In addition, data is also provided for non-specialised retailing activities where food, beverages or tobacco are not predominating (e.g. department stores) classified within Class 52.12, for the retail sale of second-hand goods (Group 52.5) and for retail sale not in stores, such as through mail order houses and markets.

The statistics presented in this report rely on the latest data collected under the Council Regulation concerning structural business statistics (EC, EURATOM) No. 58/97 of 20 December 1996, whose Annex 3 addresses specifically distributive trade activities.

Data was extracted from the database in the second half of August 1999, and no figures were available for Greece and Spain at the time of writing

	B	DK	D (1)	EL	E	F	IRL (1)	I	L (2)	NL (3)	A (4)	P	FIN (1)	S	UK	N
Number of enterprises (thousands)																
Total	:	21.1	231.3	:	:	290.6	11.3	478.7	2.3	66.2	28.1	75.3	16.3	38.0	124.5	22.2
52.12	:	0.0	2.9	:	:	1.4	0.1	1.7	0.0	0.2	0.7	1.0	0.1	0.1	15.4	0.9
52.3	:	0.8	25.0	:	:	29.5	1.1	32.7	0.1	3.2	2.2	4.6	1.2	0.9	7.3	1.2
52.4	:	18.1	156.7	:	:	180.4	9.5	338.3	2.1	42.6	22.3	60.7	13.4	33.5	90.3	18.0
52.6	:	1.2	43.2	:	:	66.5	0.1	103.5	0.2	17.3	1.8	8.4	0.9	2.1	6.3	1.5
Number of persons employed (thousands)																
Total	162.2	120.9	1,811.8	:	:	836.5	65.5	949.0	10.9	:	179.7	244.6	62.7	:	:	95.5
52.12	5.4	27.1	182.8	:	:	28.5	8.2	41.5	0.4	39.8	9.1	4.6	17.1	:	:	4.1
52.3	18.0	8.9	253.5	:	:	141.1	7.1	88.1	0.9	:	19.7	20.7	7.4	:	:	7.6
52.4	125.3	81.7	1,170.2	:	:	569.2	48.4	680.8	9.2	279.4	141.8	207.7	36.0	:	:	79.7
52.6	10.7	1.9	198.5	:	:	85.9	0.9	134.5	0.5	32.7	7.2	10.5	1.5	:	:	3.3
Turnover (million ECU)																
Total	24,324	15,919	195,143	:	:	115,235	6,390	94,125	1,404	:	21,250	17,526	10,030	17,907	130,578	10,738
52.12	995	5,433	19,340	:	:	4,254	811	7,170	69	:	1,020	278	3,166	583	21,734	513
52.3	3,053	1,201	29,200	:	:	23,208	755	13,318	167	:	2,623	2,281	1,211	2,891	9,061	980
52.4	18,857	8,988	113,194	:	:	75,186	4,644	64,994	1,208	27,659	16,403	14,426	5,269	13,320	86,616	8,835
52.6	1,259	225	32,994	:	:	11,379	133	8,435	54	3,032	1,094	477	342	966	11,310	372
Value added at factor cost (million ECU)																
Total	3,935	:	:	:	:	25,328	1,290	17,541	309	:	4,892	2,492	2,016	3,600	:	2,173
52.12	181	:	:	:	:	842	181	1,032	10	:	189	39	571	125	:	96
52.3	671	:	:	:	:	5,885	173	2,695	37	:	626	419	309	490	:	203
52.4	2,867	:	:	:	:	16,304	894	12,324	256	6,156	3,855	1,970	1,071	2,780	:	1,805
52.6	187	:	:	:	:	2,057	29	1,431	10	649	189	57	56	177	:	59
Gross operating surplus (million ECU)																
Total	1,862	807	:	:	:	7,614	:	10,435	120	:	1,420	888	791	991	:	523
52.12	63	58	:	:	:	91	:	-19	3	:	7	11	189	21	:	26
52.3	373	59	:	:	:	2,637	:	1,826	19	:	229	212	142	101	:	32
52.4	1,296	664	:	:	:	4,302	:	7,365	104	2,675	1,121	630	429	815	:	435
52.6	107	13	:	:	:	503	:	1,226	5	456	48	34	26	39	:	25
Gross investment in tangible goods (million ECU)																
Total	:	491	4,022	:	:	3,598	209	2,818	:	:	635	:	190	417	4,072	:
52.12	:	77	520	:	:	547	74	195	:	:	31	:	69	5	659	:
52.3	:	11	379	:	:	431	14	206	:	:	61	:	12	36	144	:
52.4	:	393	2,515	:	:	2,369	116	2,050	:	937	515	:	105	358	3,067	:
52.6	:	6	580	:	:	216	2	354	:	85	24	:	3	15	182	:

(1) 1997 data.

(2) 1995 data for NACE Rev. 1 52.12 and for totals.

(3) 1997 data, except number of enterprises (1996) and number of persons employed (1995).

(4) 1995 data, except number of enterprises (1996).

Source: SBS

Table 1: main indicators of non-food retailing, 1996

- **Number of enterprises:** a count of the enterprises registered to the population concerned in the business register. Dormant units are excluded.
- **Number of persons employed:** includes employees and unpaid persons employed. Unpaid persons covers the self-employed and unpaid family workers who live with the proprietor of a unit and work regularly for the unit, but do not have a contract of service nor receive a fixed wage or salary.
- **Number of employees:** persons who work for an employer and have an employment contract and receive compensation (wages, salaries, fees, gratuities, remuneration in kind). Includes part-time and seasonal workers.
- **Turnover:** totals invoiced including all duties, taxes and all other charges passed to the customer. Price reductions, rebates and discounts are deducted.
- **Production value:** the amount produced based on sales after deduction of the purchases of merchandise and of changes in stocks.
- **Value added at factor cost:** gross income from operating activities including operating subsidies and excluding indirect taxes = turnover + capitalised production + other operating income +/- changes in stocks - purchases of goods and services - taxes on products and production.
- **Personnel costs:** total remuneration, in cash or in kind, payable by an employer to an employee in return for work done by the latter including employer's social security contributions. Wages and salaries include only employees' social security contributions retained by the unit.
- **Gross operating surplus:** surplus generated by operating activities after compensation of the labour factor = value added minus personnel costs.
- **Gross investment in tangible goods:** investment in all tangible goods (new and existing) bought or produced for own use, having a useful life of more than one year. Excludes capital goods used under rental/lease contracts.
- **Wage adjusted labour productivity:** (value added / personnel costs) * (employees / persons employed).

Enterprise demography and employment

Italy recorded the largest number of non-food retailers, with almost 480 thousand of them in business in 1996. France and Germany followed with 291 thousand and 231 thousand enterprises respectively, whilst the United Kingdom had the smallest number of enterprises amongst the large Member States, fewer than 125 thousand.

Relating this indicator to the population allows us to measure enterprise density across Europe. It ranged between 21 enterprises per 10,000 inhabitants in the United Kingdom in 1996 up to 83 enterprises in Italy, with an average for the countries covered of about 45 enterprises.

In a majority of countries, clothing retailers accounted for the largest share of enterprises in this sector, accounting for more than 15% of the total number of non-food retailing enterprises. It should be noted however that according to the NACE Rev. 1 classification, a very large number of enterprises are classified within the residual Class 52.48 (other retail sale in

specialised stores), which covers a composite group of specialised retailers selling goods such as office equipment, photographic equipment, jewellery, games, plants, sports goods, etc.

A very large number of enterprises sell via stalls and markets in France, Italy and the Netherlands, representing a substantial share of non-food retailing enterprises. It should be noted that food products are also sold in this activity.

Looking at the average size of enterprises, German retailers were the largest amongst the countries covered, employing on average 8

persons. In contrast, their Italian counterparts employed only 2 persons, whilst the average for the countries for which data is available was under 4 persons.

Non-specialised enterprises found within NACE Rev. 1 Class 52.12 (e.g. department stores), as well as mail order houses were generally larger in all countries, with average employment of 40 persons and 14 persons respectively. The smallest average employment was recorded for second-hand goods retail enterprises and retailing via stalls and markets, with barely more than one person per enterprise.

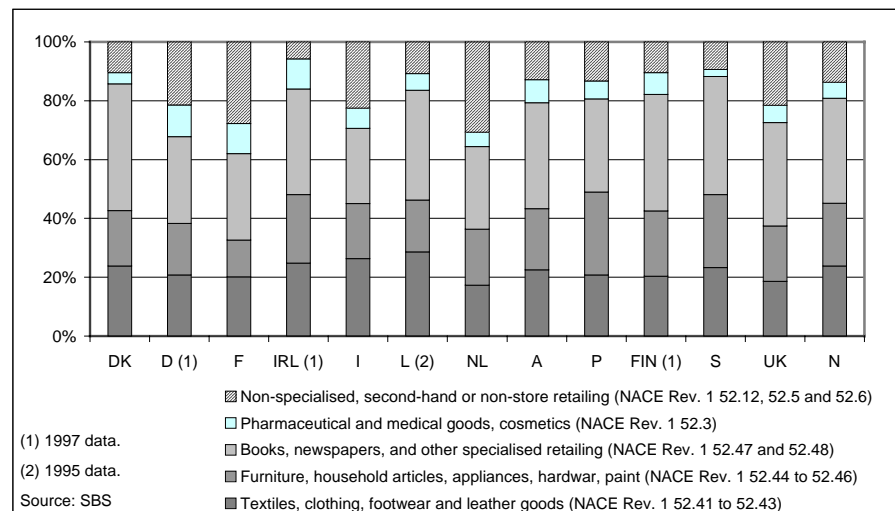


Figure 2: breakdown of enterprises in non-food retailing, 1996

Characteristics of turnover

Although Italy had the largest number of non-food retailers, it is in Germany that the global turnover of the sector was the highest, reaching 195 billion ECU in 1997. Germany preceded the United Kingdom (131 billion ECU in 1996) and France (115 billion ECU in 1996). Average turnover per enterprise was equal to approximately 475 thousand ECU. Retailers based in the United Kingdom achieved twice this amount, at more than 1 million

ECU in 1996, whilst Italy closed the ranking with an average turnover under 200 thousand ECU per enterprise.

A cross-sectoral analysis reveals that mail order houses generally realised the highest average turnover in 1996, which could be estimated at over 3 million ECU in the countries covered. Non-specialised retailers classified within NACE Rev. 1 Class 52.12 (e.g.

department stores) followed with an average turnover exceeding 2.6 million ECU. In contrast, enterprises doing business via stalls and markets recorded the lowest mean turnover, with less than 80 thousand ECU each. Amongst specialised businesses, turnover was highest within dispensing chemists (approximately 1 million ECU) and hardware, paint and glass retailers (around 700 thousand ECU).

Turnover per person employed ranged from 72 thousand ECU per head in Portugal in 1996 to 160 thousand ECU in Finland in 1997, with an average that could be estimated at approximately 110 thousand ECU for the countries for which data is available. Dispensing chemists (150 thousand ECU) and mail order houses (over 220 thousand ECU) performed far above this average, whilst textile retailers and retailers via markets and stalls were clearly below the average (around 60 thousand ECU).

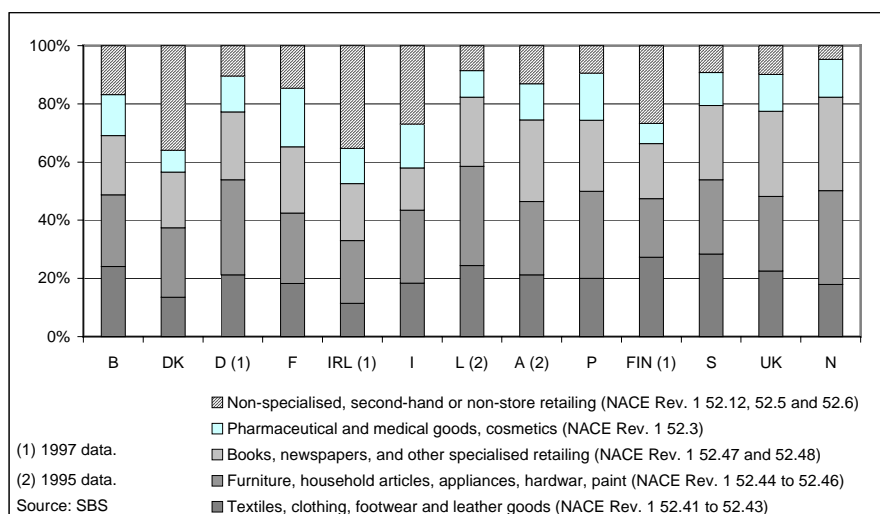


Figure 3: breakdown of turnover in non-food retailing, 1996

Productivity and investment

The amount of value added generated by each person employed can be used as a first indicator of labour productivity. Available figures reveal that Finnish non-food retailers enjoyed the highest labour productivity level, at more than 32 thousand ECU in 1997, just above the level recorded in France the year before (30 thousand ECU), and more than three times the productivity of the average person employed in Portugal (10 thousand ECU).

It should however be borne in mind that the labour force structure, such as the importance of part-time work or different levels of personnel costs, may somewhat distort the comparison.

Gross investment in tangible goods by non-food retailers reached 4,300 ECU per person employed in France in 1996, the highest level

recorded amongst the countries covered. Germany closed the ranking with only 2,200 ECU per head. The investment rate was usually higher in non-specialised stores (NACE Rev. 1 52.12) than in specialised ones. Similarly, it was as a general rule lower for retailing via stalls and markets activities.

Persons employed by dispensing chemists (NACE Rev. 1 52.31) had the highest productivity of all non-food retailing enterprises in a majority of countries, reaching a level as high as 49 thousand ECU in Luxembourg. Retail sale via stalls and markets was, in contrast, the activity with the lowest labour productivity, generating less than 10 thousand ECU of value added per person employed in Ireland, Italy and Portugal.

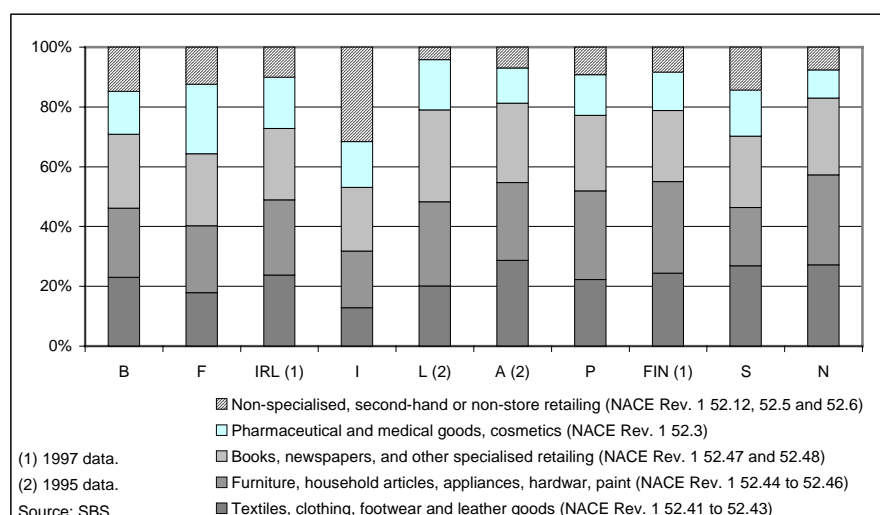


Figure 4: breakdown of value added at factor cost in non-food retailing, 1996

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