

Distributive trades in the Central European Countries

A major sector in rapid transformation - Jan Stensrud

Statistics in focus

INDUSTRY, TRADE AND SERVICES

THEME 4 –23/1999

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Main Results

- Around 2 million enterprises in trade in CECs
- Poland accounts for almost half of the total number of enterprises in CECs
- More than 70% of trade enterprises in Albania, Bulgaria, Lithuania and Romania are found in the retail sector
- Higher enterprise density in the Czech Republic and Poland than in the EU
- Retail trade generally developing at a more rapid pace than the two other distribution activities in CECs

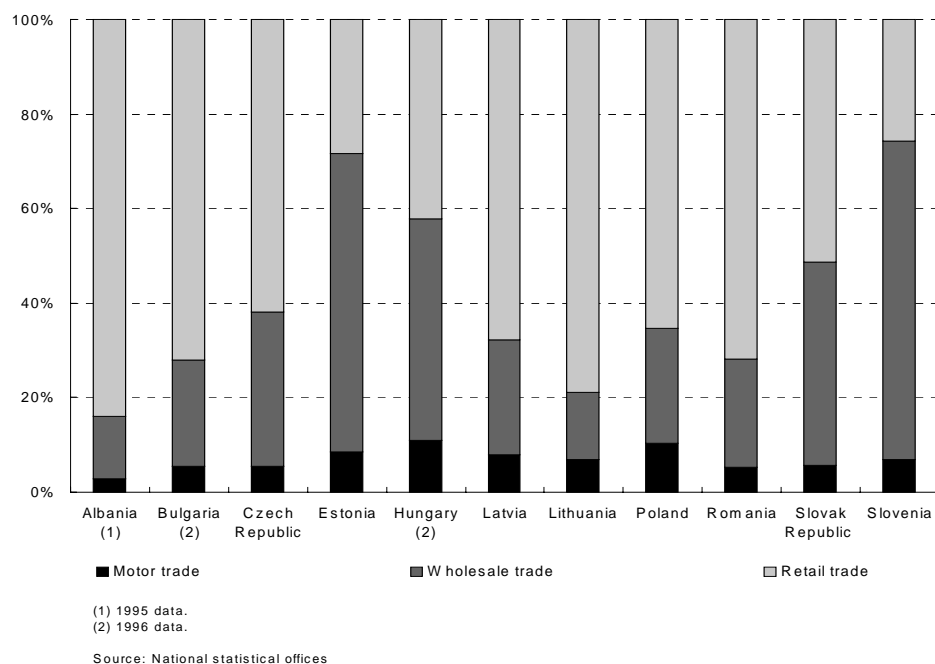


Figure 1: number of enterprises, 1997

NB: Please note all Hungarian data is under revision.



Introduction

The development of commerce within the Central European Countries is one of the most striking changes that has taken place in the business structure following the transition to market based economies that took place during the early nineties. There are however differences in the speed of development and type of trade that has developed in each of the

countries. Whilst the number of enterprises in commerce has generally grown rapidly since 1990 in the Czech Republic, and Poland, the speed of transition has been somewhat less rapid elsewhere.

This short report details the most recent data collected by Central European Countries (CECs),

following the Council Regulation concerning structural business statistics (EC, EURATOM) No. 58/97 of 20 December 1996 as closely as possible. The data published cover all enterprises within the distribution business population and were extracted from Eurostat's harmonised database during April 1999.

	Number of enterprises (thousands)	Number of persons employed (thousands)	Turnover (million ECU)	Value added at factor cost (million ECU)	Personnel costs (million ECU)	Gross investment (million ECU)
Albania (1)	17.0	33.1	375	:	:	24
Bulgaria (3) (6)	87.4	316.5	6,818	747	:	91
Czech Republic (6)	520.2	751.4	53,778	4,971	:	1,946
Estonia (2)	17.8	:	4,791	386	238	:
Hungary (3) (6)	72.2	:	26,001	2,161	1,257	:
Latvia	15.4	105.4	4,302	:	193	100
Lithuania (6)	17.5	246.5	5,894	1,247	:	:
Poland	1,006.7	2,061.0	136,248	16,032	5,464	2,131
Romania	226.1	:	21,027	:	:	:
Slovak Republic (4)	81.4	:	25,019	:	:	:
Slovenia (5) (6)	23.0	108.0	13,564	1,478	966	:

(1) 1995 data.

(2) Provisional for turnover.

(3) 1996 data.

(4) 1996 data for turnover, NACE Rev. 1 51.

(5) 1996 data for personnel costs and value added.

(6) Value added at basic prices.

Source: National statistical offices

Table 1: main indicators, 1997

Number of enterprises

The number of enterprises in the distributive sector of the CEC economies has grown at a rapid pace since the transition to market based economies. Estimates for the eleven CECs covered by this report suggest that there were around 2 million enterprises in this activity in 1997. This figure may be compared to just over 5 million distribution enterprises within the European Union. Poland accounted for about half of the total number of enterprises in CECs, some one million in 1997. The rapid expansion of the distribution sector of the economy has led to figures on the average number of enterprises per 10,000 population in CECs being generally far higher than in the European Union. For purposes of comparison, Portugal was the Member State with the highest enterprise density in retail

trade, with some 127 enterprises per 10,000 inhabitants in 1996. Within the CECs, the highest density was recorded in the Czech Republic, where 312 retail trade enterprises existed for each 10,000 inhabitants. Poland also reported enterprise density above the Portuguese figure for retail trade, with 170 enterprises per 10,000 inhabitants.

The development of retail trade has generally been at a more rapid pace than the other two trade activities of motor trade and wholesale trade. Indeed, some concern has been voiced as to the ability of the distribution networks to cope with the rapid expansion of retail activity. Many of the distribution systems within CECs are still largely organised on a centralised basis.

We can note that motor trade never accounted for more than 11% of the total population of distributive trades (similar levels to those seen in the EU). Retail trade accounted for an absolute majority of enterprises in thirteen of the EU Member States and similar trends were observed for the majority of CECs. However, Estonia, Hungary and Slovenia reported a large share for wholesale trade enterprises in the distributive trades' total. Indeed, in Slovenia and Estonia wholesale trade accounted for an absolute majority of enterprises within distribution. The other CECs reported a trend that followed that seen in the EU more closely, with greater importance for the share of retail trade enterprises, which rose to more than 70% of the total in Albania, Bulgaria, Lithuania and Romania.

	Albania (2)	Bulgaria (3)	Czech Republic	Estonia	Hungary (3)	Latvia	Lithuania	Poland (4)	Romania	Slovak Republic	Slovenia
Motor trade: NACE Rev. 1 50											
50	2.8	5.5	5.5	8.4	10.9	8.0	6.9	10.3	5.3	5.7	6.9
50.1	0.0	0.3	0.3	3.0	:	:	:	:	1.7	1.7	3.0
50.2	0.8	2.4	4.9	4.1	:	:	:	:	1.9	3.2	2.7
50.3	1.0	2.3	0.1	:	:	:	:	:	1.4	0.5	0.9
50.4	0.0	0.1	0.0	:	:	:	:	:	0.0	0.1	0.0
50.5	0.9	0.5	0.2	1.3	:	1.3	:	:	0.3	0.2	0.2
Wholesale trade: NACE Rev. 1 51											
51	13.3	22.5	32.7	63.2	46.9	24.2	14.1	23.5	22.8	43.0	67.4
51.1	0.4	2.3	20.7	6.0	:	2.9	:	:	6.6	27.0	40.3
51.2	0.5	1.4	0.1	0.5	:	0.3	:	:	0.9	0.6	0.3
51.3	5.2	5.8	0.5	3.3	:	6.3	:	:	5.2	1.2	1.9
51.4	1.6	4.4	0.6	4.0	:	5.6	:	:	2.7	2.3	3.4
51.5	3.1	4.4	0.3	3.8	:	5.2	:	:	1.3	1.3	3.8
51.6	0.4	1.6	0.2	1.8	:	1.5	:	:	0.3	1.0	0.8
51.7	2.2	2.6	10.4	43.9	:	2.3	:	:	5.9	9.6	17.0
Retail trade: NACE Rev. 1 52											
52	83.9	72.0	61.8	28.3	42.2	67.8	78.9	65.4	71.9	51.4	25.7
52.1	:	27.5	44.8	12.8	:	19.7	:	:	35.1	29.3	11.9
52.2	:	8.4	1.0	1.3	:	1.1	:	:	7.5	4.9	1.2
52.3	:	3.2	0.5	2.0	:	3.5	:	:	1.6	1.2	0.4
52.4	:	16.8	8.7	9.1	:	11.2	:	:	20.8	7.3	10.2
52.5	:	0.5	0.3	3.1	:	3.6	:	:	1.7	0.3	0.1
52.6	:	12.6	5.1	:	:	26.9	:	:	4.2	7.0	0.6
52.7	:	2.9	1.4	:	:	1.8	:	:	1.1	1.4	1.3

(1) NACE Rev. 1 classification: 50.1: sale of motor vehicles; 50.2: maintenance and repair of motor vehicles; 50.3: sale of motor vehicles parts and accessories; 50.4: sale, maintenance and repair of motorcycles and related parts and accessories; 50.5: retail sale of automotive fuel; 51.1: wholesale on a fee or contract basis; 51.2: wholesale of agricultural raw materials and live animals; 51.3: wholesale of food, beverages and tobacco; 51.4: wholesale of household goods; 51.5: wholesale of non-agricultural intermediate products, waste and scrap; 51.6: wholesale of machinery, equipment and supplies; 51.7: other wholesale; 52.1: 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.

(2) 1995 data.

(3) 1996 data.

(4) 1996 data for NACE Rev. 1 51.

Source: National statistical offices

Table 2: share of number of enterprises by activity, 1997 (%) (1)

	Number of enterprises (units)	Average number of enterprises per 10,000 population (units)	Number of persons employed (thousands)	Average number of persons employed per enterprise (units)	Share of employees in the total number of persons employed (%)	Number of persons employed, share in total distributive trade (%)
Motor trade: NACE Rev. 1 50						
Albania (1)	474	1.5	1.2	2.5	52.8	3.5
Bulgaria (2)	4,827	5.8	23.3	4.8	76.6	7.4
Czech Republic	28,519	27.7	74.4	2.6	75.1	9.9
Estonia	1,502	8.2	:	:	:	:
Hungary (2)	7,870	7.7	:	:	:	:
Latvia	1,236	5.0	10.8	8.7	97.1	10.2
Lithuania	1,211	3.3	18.4	15.2	65.8	7.5
Poland	104,172	26.9	204.0	2.0	65.2	9.9
Romania	12,017	5.3	:	:	:	:
Slovak Republic	4,602	8.5	:	:	:	:
Slovenia	1,582	8.0	19.0	12.0	72.6	17.6
Wholesale trade: NACE Rev. 1 51						
Albania (1)	2,253	6.9	6.4	2.8	36.6	19.3
Bulgaria (2)	19,646	23.6	99.8	5.1	75.5	31.5
Czech Republic	170,318	165.4	240.5	1.4	75.8	32.0
Estonia	11,248	64.2	33.4	3.6	:	:
Hungary (2)	33,855	33.3	:	:	:	:
Latvia	3,730	15.2	28.2	7.6	97.0	26.7
Lithuania	2,475	6.7	38.2	15.4	65.7	15.5
Poland	244,181	63.2	719.0	2.9	81.2	34.9
Romania	51,572	22.9	:	:	:	:
Slovak Republic	34,987	64.9	:	:	:	:
Slovenia	15,531	78.2	23.0	1.5	:	21.3
Retail trade: NACE Rev. 1 52						
Albania (1)	14,255	43.9	25.6	1.8	23.9	77.2
Bulgaria (2)	62,949	75.5	193.5	3.1	58.4	61.1
Czech Republic	321,366	312.0	436.5	1.4	64.9	58.1
Estonia	5,041	27.3	:	:	:	:
Hungary (2)	30,442	29.9	:	:	:	:
Latvia	10,468	42.6	66.5	6.4	93.2	63.1
Lithuania	13,813	37.3	189.9	13.7	65.6	77.0
Poland	658,343	170.3	1,138.0	1.7	56.8	55.2
Romania	162,524	72.1	:	:	:	:
Slovak Republic	41,835	77.6	:	:	:	:
Slovenia	5,930	29.9	66.0	11.1	74.0	61.1

(1) 1995 data.

(2) 1996 data.

Source: National statistical offices

Table 3: enterprise and employment indicators, 1997

Number of persons employed

By far the largest activity in terms of the number of persons employed in distributive trades' in the CECs was retail trade. Indeed, retail trade accounted for the absolute majority of persons employed in every country for which data was available. The share of the retail sector in the total number of persons employed in distributive trades ranged between 55% in Poland and 77% in Albania.

Whilst wholesale trade accounted for a majority of enterprises in Slovenia, only 21% of the persons employed were found in this activity. The highest share of persons in wholesale trade was found in Poland (almost 35%).

In motor trade there were less than 10% of the total number employed in Albania, Bulgaria, the Czech Republic, Lithuania and Poland. For comparison, the Netherlands had the lowest share of persons employed in motor trade in the EU, with some 11% of the distributive trades' total.

More than two million persons were employed in distributive trades in Poland in 1997 (just below the number employed within the United Kingdom). If we compare the 1997 Polish data with that from 1995, we see that there has been sizeable growth. The increase during the three-year period was equal to a net gain of 29 thousand persons in wholesale trade, 94 thousand persons in retail trade and 35 thousand persons in motor trade. Three-quarters of a million persons were employed in the Czech Republic.

Employment was generally concentrated in small-sized enterprises. The average number of persons employed per enterprise was often found to be below 2 persons. One country which clearly did not fit into this pattern was Lithuania, where the average

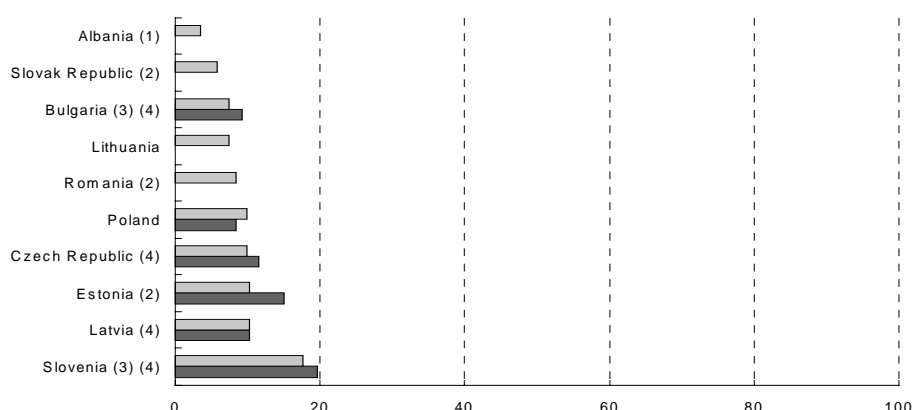


Figure 2: value added and number of persons employed, share in distributive trades' total, motor trade, 1997 (%)

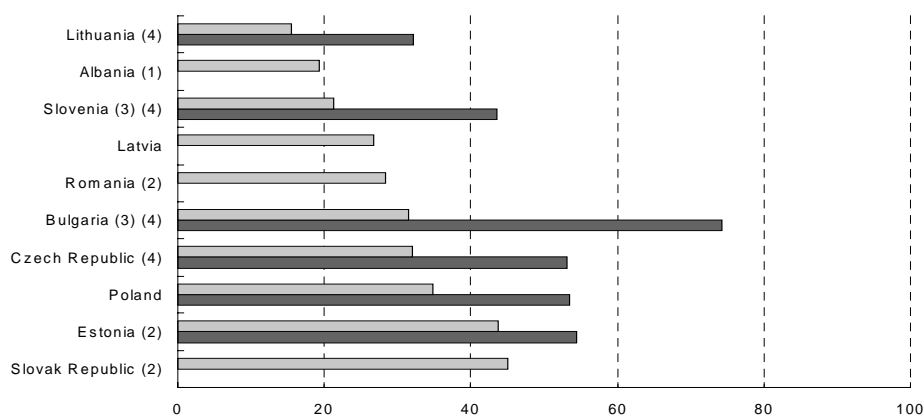


Figure 3: value added and number of persons employed, share in distributive trades' total, wholesale trade, 1997 (%)

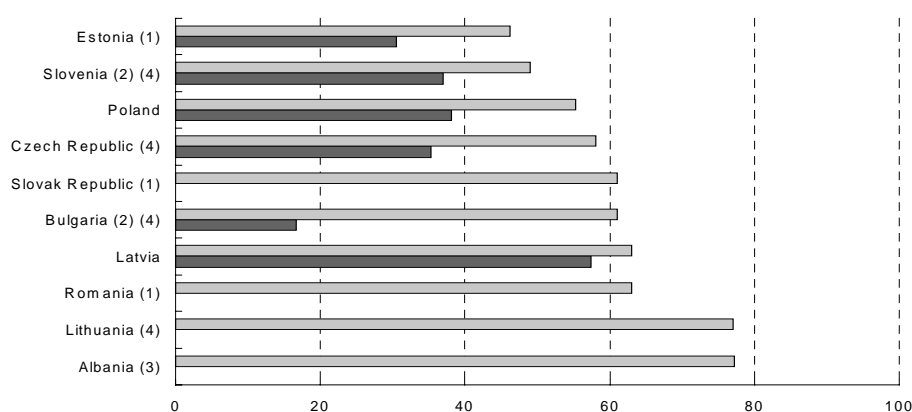


Figure 4: value added and number of persons employed, share in distributive trades' total, retail trade, 1997 (%)

□ Employment ■ Value added

(1) 1995 data.
 (2) Employees.
 (3) 1996 data.
 (4) Value added at basic prices.

Source: National statistical offices

number of persons employed per enterprise was equal to 15.2 in motor trade, 15.4 in wholesale trade and 13.7 in retail trade.

The ratio of the number of employees to the number of persons employed ranged between 65% and 77% for the majority of countries for each of the three types of trade. There were four

exceptions to this rule, Latvia, Poland, Bulgaria and Albania. In Latvia there was a high propensity for the workforce to be composed of employees (i.e. there were very few self-employed or family workers); the shares of employees for each of the three trade activities were above 93%. In Poland and Bulgaria, the share of employees in the total number of persons

employed was lower than the CEC average in retail trade at 57% and 58% respectively, whilst in Poland it was higher in wholesale trade at 81%. In Albania there were a large number of self-employed and family workers in all three trade activities, between 76% (retail trade) and 47% (motor trade) of the total.

Turnover

Total turnover within the CECs ranged between 375 million ECU in Albania and 136 billion ECU in Poland. A study of the ratio of average turnover per enterprise gives an idea of the size of distribution enterprises. The ratio

ranged between 22 thousand ECU per enterprise in Albania and 589 thousand ECU per enterprise in Slovenia. For means of comparison it is interesting to note that the comparable figure for Portugal was 380 thousand ECU per enterprise

(this was the lowest value in the EU in 1996 and the only one below Slovenia).

Average turnover per enterprise within the different trade activities was found to be highest in motor

	Turnover (million ECU)	Average turnover		Main indicators as a share of turnover (%)			
		Per enterprise (thousand ECU)	Per person (thousand ECU)	Production value	Value added at factor cost	Personnel costs	Gross investment
Motor trade: NACE Rev. 1 5 0							
Albania (1)	33	70.4	28.4	:	:	:	4.4
Bulgaria (2) (7)	672	139.2	28.9	19.8	10.2	:	2.0
Czech Republic (5)	6,755	236.9	90.8	:	8.5	:	5.0
Estonia (3)	725	482.7	:	19.5	8.0	4.6	:
Hungary (2) (5)	4,205	534.3	:	18.4	8.0	3.0	:
Latvia	463	374.8	43.1	23.7	:	5.0	8.0
Lithuania (5)	318	262.4	17.3	68.1	40.3	:	:
Poland	10,872	104.4	53.3	25.4	12.4	4.0	2.8
Romania	2,034	169.3	:	:	:	:	:
Slovak Republic	1,541	334.9	:	:	:	:	:
Slovenia (4) (5)	2,651	1,675.8	139.5	21.0	10.9	5.8	:
Wholesale trade: NACE Rev. 1 5 1							
Albania (1)	160	70.8	25.0	:	:	:	4.6
Bulgaria (2) (7)	5,110	260.1	51.2	20.6	10.9	:	1.2
Czech Republic (5)	30,625	179.8	127.3	:	8.6	:	:
Estonia (3) (6)	2,949	262.2	88.3	21.6	5.9	4.0	:
Hungary (2) (5)	15,416	455.4	:	22.2	7.9	4.4	:
Latvia	2,594	695.4	92.1	19.7	:	2.7	1.7
Lithuania (5)	2,819	1,139.0	73.8	27.3	14.3	:	:
Poland	84,644	346.6	117.7	21.3	10.1	3.5	1.4
Romania	10,618	205.9	:	:	:	:	:
Slovak Republic	11,586	331.2	:	:	:	:	:
Slovenia (4) (5)	5,867	377.7	255.1	26.8	11.0	7.1	:
Retail trade: NACE Rev. 1 5 2							
Albania (1)	182	12.8	7.1	:	:	:	8.2
Bulgaria (2) (7)	1,036	16.5	5.4	27.1	12.0	:	1.7
Czech Republic (5)	16,399	51.0	37.6	:	10.7	:	5.1
Estonia (3)	1,118	221.8	:	22.6	10.5	7.8	:
Hungary (2) (5)	6,380	209.6	:	22.0	9.5	7.2	:
Latvia	1,245	118.9	18.7	23.1	:	8.0	1.6
Lithuania (5)	2,757	199.6	14.5	35.2	26.0	:	:
Poland	40,733	61.9	35.8	28.6	15.0	5.0	1.6
Romania	8,375	51.5	:	:	:	:	:
Slovak Republic	5,124	122.5	:	:	:	:	:
Slovenia (4) (5)	5,047	851.0	76.5	19.6	10.8	7.8	:

- (1) 1995 data.
(2) 1996 data.
(3) Provisional for turnover.
(4) 1996 data for production and personnel costs.
(5) Value added at market prices.
(6) 1996 data for value added.
(7) Value added at basic prices.

Source: National statistical offices

Table 4: turnover and main indicators, 1997

trade within Slovenia (at 1.7 million ECU per enterprise). The highest ratio recorded in retail trade was also in Slovenia, some 851 thousand ECU per enterprise. However, in wholesale trade Hungary, Latvia and Lithuania all reported higher average turnover per enterprise (Lithuania, 1.1 million ECU per enterprise was the highest).

An alternative means of comparing turnover is to look at the ratio of

average turnover per person employed. For the CECs we find that there was a large range, from just 11.3 thousand ECU in Albania to over 125 thousand ECU per person employed in Slovenia (for the whole of distributive trade)

Turnover per head by activity reported similar trends to those within the EU, with the activity of wholesale trade reporting the highest ratios, followed by motor trade and retail trade. Average

turnover per head in wholesale trade ranged between 25 thousand ECU in Albania and 255 thousand ECU in Slovenia. This figure was above that found in Portugal (189 thousand ECU per head in 1996), the only country in the EU with a ratio below that of Slovenia. Within retail trade turnover per head ranged between only 5.4 thousand ECU per head in Bulgaria and 76.5 thousand ECU per head in Slovenia.

	Value added at factor cost (million ECU)	Value added per person employed (thousand ECU)	Personnel costs (million ECU)	Gross investment in tangible goods per person employed (thousand ECU)
Motor trade: NACE Rev. 1 50				
Albania (1)	:	:	:	1.2
Bulgaria (2)	68.5	2.9	:	0.6
Czech Republic (3)	576.6	7.7	:	4.6
Estonia	58.2	:	33.5	:
Hungary (2) (3)	338.0	:	127.2	:
Latvia	:	:	23.3	3.5
Lithuania (3)	128.1	7.0	:	:
Poland	1,344.4	6.6	435.8	1.5
Romania	:	:	:	:
Slovak Republic	:	:	:	:
Slovenia (2) (3)	289.1	15.2	154.5	:
Wholesale trade: NACE Rev. 1 51				
Albania (1)	:	:	:	1.1
Bulgaria (2)	554.7	5.6	:	0.8
Czech Republic (3)	2,642.5	11.0	:	3.2
Estonia (4)	210.3	5.2	117.7	:
Hungary (2) (3)	1,217.9	:	671.9	:
Latvia	:	:	71.0	1.5
Lithuania (3)	401.9	10.5	:	:
Poland	8,573.0	11.9	2,996.3	1.6
Romania	:	:	:	:
Slovak Republic	:	:	:	:
Slovenia (2) (3)	642.9	28.0	417.0	:
Retail trade: NACE Rev. 1 52				
Albania (1)	:	:	:	0.6
Bulgaria (2)	124.0	0.6	:	0.1
Czech Republic (3)	1,751.8	4.0	:	1.9
Estonia	117.6	:	86.9	:
Hungary (2) (3)	605.2	:	458.3	:
Latvia	:	:	99.1	0.3
Lithuania (3)	717.1	3.8	:	:
Poland	6,115.0	5.4	2,031.5	0.6
Romania	:	:	:	:
Slovak Republic	:	:	:	:
Slovenia (2) (3)	545.4	8.3	394.4	:

(1) 1995 data.

(2) 1996 data.

(3) Value added at basic prices.

(4) 1996 data for value added per person employed.

Source: National statistical offices

Table 5: personnel costs, productivity and investment indicators, 1997

Personnel costs, productivity and investment

Total personnel costs rose to almost 5.5 billion ECU in Poland in 1997 for the whole of distributive trade. The activity of wholesale trade accounted for the largest share, just under 3 billion ECU. Where data was available, one point that was evident in the figures was that average personnel costs in wholesale trade were considerably higher than in retail trade. Indeed, wholesale trade had higher total personnel costs than retail trade.

Personnel costs as a share of turnover generally ranged between 3% and 8%. The highest shares were recorded in the activity of retail trade (Estonia, Latvia and Slovenia all above 7.5%). The lowest shares were generally seen in wholesale trade, the lowest being in Latvia, 2.7%.

Labour productivity (value added divided by persons employed) was highest for all three NACE Rev. 1

Divisions in Slovenia (subject to data availability). The most productive activity in Slovenia was wholesale trade (28 thousand ECU of value added per person employed), followed by motor trade (15.2 thousand ECU per head) and retail trade (8.3 thousand ECU per head). This ranking of activities followed the pattern seen in almost all EU Member States. The level of labour productivity in the wholesale trade activity in Slovenia was however well below comparable figures for the EU. For example, the lowest labour productivity in the EU for wholesale trade (subject to data availability in 1996) was recorded in Ireland, some 42.3 thousand ECU.

Value added expressed as a share of turnover was generally high in three countries, independent of the activity studied; they were Lithuania, Poland and Slovenia. Looking at the different activities

we find that retail trade usually had the highest share of value added in turnover (only Hungary reported a figure below the 10% level). Whilst this was generally following the same trend as seen in the EU, the figures were at a lower level. Indeed, many EU countries reported value added accounting for almost 20% of turnover within the activity of retail trade, whilst most of the CECs reported shares of between 10% and 15%.

Turning to investment, we can note that investment levels were higher in the Czech Republic than they were in Poland. This was not only true for the ratio investment per head but also for total investment for the two activities which reported data in 1997 (motor and retail trade). Total investment in retail trade in the Czech Republic was 844 million ECU in 1997, equivalent to almost 2 thousand ECU per head.

Further information

This report is released at the same time as a complementary report covering the latest data set on distributive trades within the European Economic Area. For additional information on the activity of distribution in the EU, please refer to the Commission White Paper on Commerce, COM (1999) 6 final from 27/1/1999.

Eurostat and DG XXIII will release a yearbook on commerce, called "Distributive Trades in Europe", the publication is foreseen for late 1999. It will be released in the form of a CD-ROM (a tri-lingual product that includes analysis, a database with EU and CEC data, as well as background information on sources

and methodology). There will also be a single language paper publication (German, English and French, approximately 200 pages) with economic analysis, tables and graphics. For users interested in the main facts and figures, a tri-lingual pocket-book will be released at the same time.

Further information:

➤ Reference publications

Title Distributive Trades in Europe, 1999 (late 1999)

➤ Databases

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