Themenkreis 7 • Theme 7 • Thème 7
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# Handel und Dienstleistungen
# Distributive trade and services
# Commerce et services

Supplement 2 ☐ 1997

## Key Figures for

# COMMERCE IN THE EUROPEAN ECONOMIC AREA

## in the mid-1990s

| 30% of enterprises | 15.6% of jobs | 13% of GDP |
|---|---|---|
| **4.7 million enterprises** shared between | **22.5 million persons employed** shared between | **ECU 700 billion** shared between |
| intermediaries **316 000** | intermediaries **700 000** | intermediaries **20** |
| wholesalers **920 000** | wholesalers **6 449 000** | wholesalers **215** |
| retailers **3 466 000** | retailers **15 346 000** | retailers **465** |
| 1.7% | 0.4% | 0.4% |
| 5.6% | 4.3% | 4.0% |
| 22.7% | 10.3% | 8.6% |

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To find out more about Eurostat's statistics on commerce in Europe, see the following publications:

- Retailing in the European Economic Area: 1996. D.G. XXIII and Eurostat. Office for Official Publications of the European Communities 1997 (Update of the two publications below).
- Retailing in the European single market 1993. DG XXIII and Eurostat. Office for Official Publications of the European Communities, 1994.
- Retailing in the European Economic Area: Supplement to the above publication dealing with the EFTA countries. DG XXIII and Eurostat. Office for Official Publications of the European Communities, 1995.
- Retailing, services, transport. Monthly bulletin. Eurostat.

Publications planned for 1997:

- Wholesaling in the European Economic Area, 1997.
- Retailing in the Central and East European countries, 1997.

For general information on the statistics compiled at European level, see the Eurostat Catalogue CISBN.

*For information on the Commission's activity to assist commerce:*

*consult:* **Green Paper on commerce.**
**Supplement 2/97 to the Bulletin of the European Union.**
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Office for National Statistics
Institute for Retail Studies, University of Stirling
Institute of Grocery Distribution

**Sweden**
Statistics Sweden

# Preface

The "Green Paper on commerce" published by The Commission in November 1996 lays great emphasis on the strategic importance of high-quality statistical and economic information on commerce.

"*Without reliable information, economic operators can only take decisions on the basis of hypotheses or estimates, a process which itself leads to inequalities between operators, as SMEs lack the means to conduct large-scale research. It is therefore important for those involved in commerce, be they economic operators or public authorities, to have at their disposal statistics and economic analyses in order to facilitate taking the necessary decisions and to respond promptly to the need to adapt*"[1].

Eurostat is fully aware of this importance and makes every effort to take it into account in its programme.

It does so in two ways.

First of all, it is continuing to set up, for the whole of Europe, an integrated system of statistical and economic information based on structural and short-term economic statistics and on the appropriate processing of these statistics as part of national accounting.

It is also gradually carrying out an ambitious programme of publications on wholesale and retail trade in the countries of the EEA and in Central and Eastern European countries. Thus an update of the 1993 and 1995 publications on retail trade, a completely new volume on wholesale trade, and a volume on retail trade in the countries of Central Europe are due to appear in 1997.

The present publication, "Key Figures on Commerce in the European Economic Area", which covers - for the first time in a single volume - intermediaries, wholesale trade and retail trade, is a further step towards a genuine integrated statistical system on commerce. Its completion will not take long, since it will be helped by the recent adoption of the Council Regulation on structural business statistics and by the recommendations which have just been made to the Member States for improving the evaluation of the value added of commerce in their national accounts.

Michael Vanden Abeele
Director-General, DG XXIII

Yves Franchet
Director-General, Eurostat

[1] Op. cit. page 17.

# Contents

# Introduction

This publication, "Key Figures on Commerce in Europe", is based on the statistical annex produced by Eurostat for the "Green Paper on commerce" drawn up by the European Commission (Directorate-General XXIII) and published in Supplement 2/97 to the Bulletin of the European Union by the Office for Official Publications of the European Communities, Luxembourg. The following is the introduction to that publication:

> *The purpose of the tables and figures in this annex is to present a general panorama of European commerce at the beginning of the 1990s. They are based on the most recent data available, which explains why the dates are not always uniform within the same table. Originally these data come from the national statistical institutes, Eurostat databases (Mercure for statistics on services and New Cronos for the harmonized national accounts) and sometimes from university or private sources. For the most part they are lifted from recent or forthcoming Eurostat publications (see bibliography on page 2). In general, the statistics reproduced cover macroeconomic values (number of enterprises and local units, number of persons employed, turnover, value added, etc.). However, the last three tables relate to the main retailing groups (turnover, involvement in international trade) and the main buying syndicates operating at European Union level.*

However, certain changes have been made. In particular, the layout has been redesigned to highlight the importance and respective roles of the three main categories of commercial operators, i.e. intermediaries, wholesalers in the strict sense of the term, and retailers. This explains the three-part structure: general view, wholesale trade and intermediaries, and retail trade. Every effort has been made to separate intermediaries from wholesalers in terms of the number of enterprises and the number of persons employed. In addition, the number of tables and figures has been considerably increased. Lastly, certain figures have been amended, mainly the figures for Spain and Portugal on the number of enterprises and employment.

# PART 1: General view

## 1.1. The importance of commerce in the European Economic Area

Commerce accounts for almost 13% of the total Gross Domestic Product of the 17 countries of the EEA, employing more than 15% (15.6) of the active population and encompassing almost 30% of enterprises. In terms of these three yardsticks, countries display substantial differences, which are the result of national characteristics, for example the importance of tourism or the predominance of small enterprises. They may also arise from the statistical sources and methods used. For this reason, any differences should be interpreted with caution as long as the Commission's policy of standardizing commerce statistics has not been implemented.

**Table 1: Share of commerce[1] in the European Economic Area (1991-1994)**

| | % of Gross Domestic Product[2] (1991) | % of total employment (1991) | % of total number of enterprises[3] (1988-1994) |
|---|---|---|---|
| Belgique/België | 15.2 | 16.3 | 20.3 |
| Danmark | 12.3 | 12.1 | 19.4 |
| Deutschland[4] | 10.5 | 14.8 | 28.0 |
| Ellada[5] | 11.2 | 12.3 | 40.0 |
| España | 15.4 | 16.0 | 33.3 |
| France | 12.6 | 14.3 | 27.6 |
| Ireland | 8.7 | 13.5 | 30.0 |
| Italia | 15.5 | 17.3 | 34.0 |
| Luxembourg | 13.9 | 15.7 | 28.1 |
| Nederland | 12.8 | 17.9 | 26.7 |
| Österreich | 13.0 | 14.9 | 30.5 |
| Portugal | 17.1 | 14.4 | 29.8 |
| Suomi/Finland | 8.9 | 13.5 | 24.4 |
| Sverige | 12.0 | 17.7 | 23.7 |
| United Kingdom | 11.5 | 16.5 | 27.3 |
| TOTAL EUR 15 | 12.7 | 15.6 | 29.4 |
| Island | 11.0 | 12.0 | 12.4 |
| Norge | 12.3 | 14.9 | 26.1 |
| EEA | 12.7 | 15.6 | 29.3 |
| United States | 14.5 | 18.3 | 17.9 |
| Japan | 13.4 | 18.1 | : |

[1] Wholesale and retail trade (including motor vehicles, recovery and repair).
[2] Gross Domestic Product at market prices. EEA and Japan 1991; USA: 1992.
[3] Share of wholesale and retail trade, data for 1988-1994.
[4] West Germany.
[5] Excluding recovery and repair.
Source: Eurostat. For GDP and employment: New Cronos, European System of Accounts. Detailed tables by branch. For enterprises: "Commerce" database.

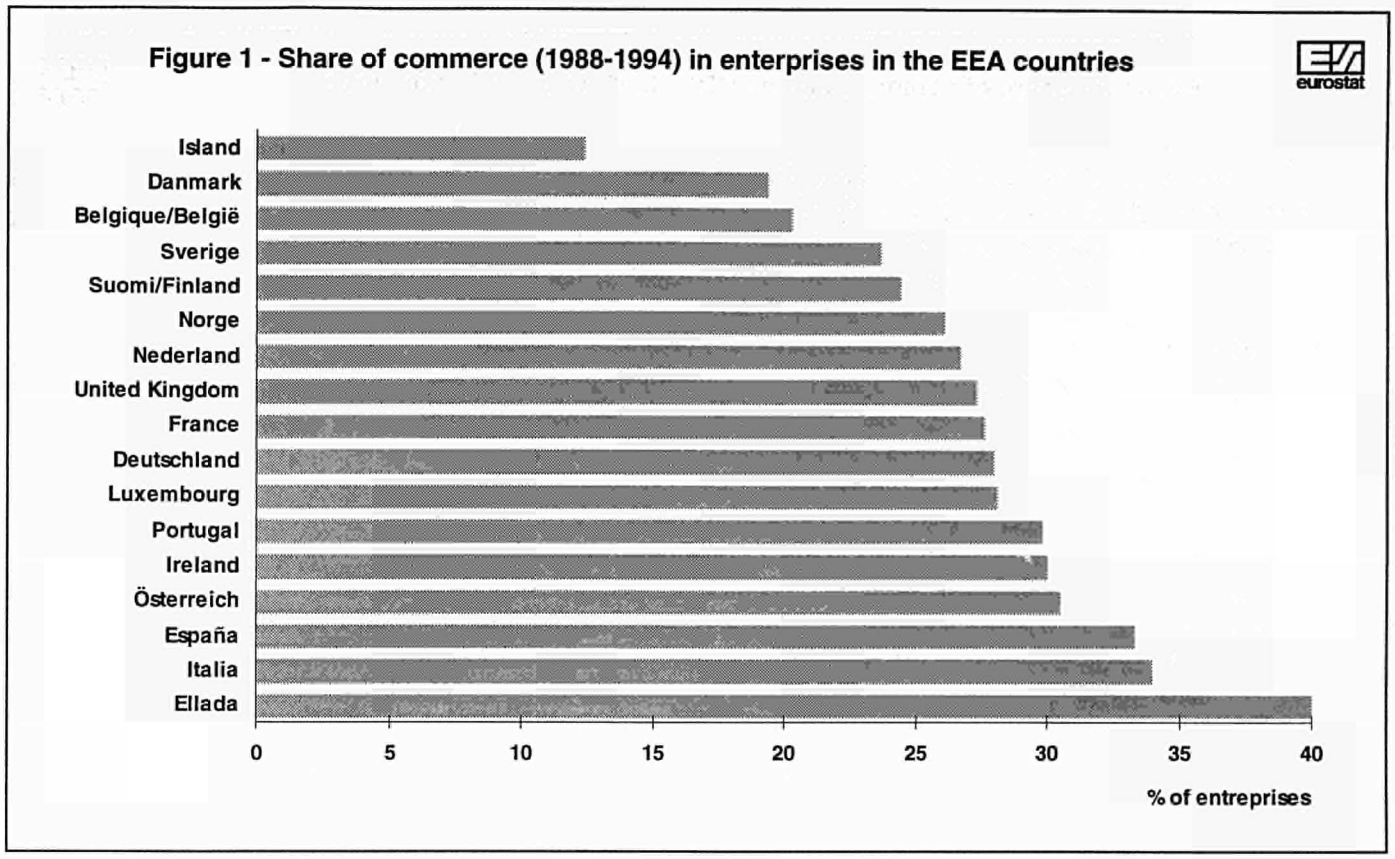


Figure 1 - Share of commerce (1988-1994) in enterprises in the EEA countries
eurostat
Island
Danmark
Belgique/België
Sverige
Suomi/Finland
Norge
Nederland
United Kingdom
France
Deutschland
Luxembourg
Portugal
Ireland
Österreich
España
Italia
Ellada
0
5
10
15
20
25
30
35
40
% of entreprises

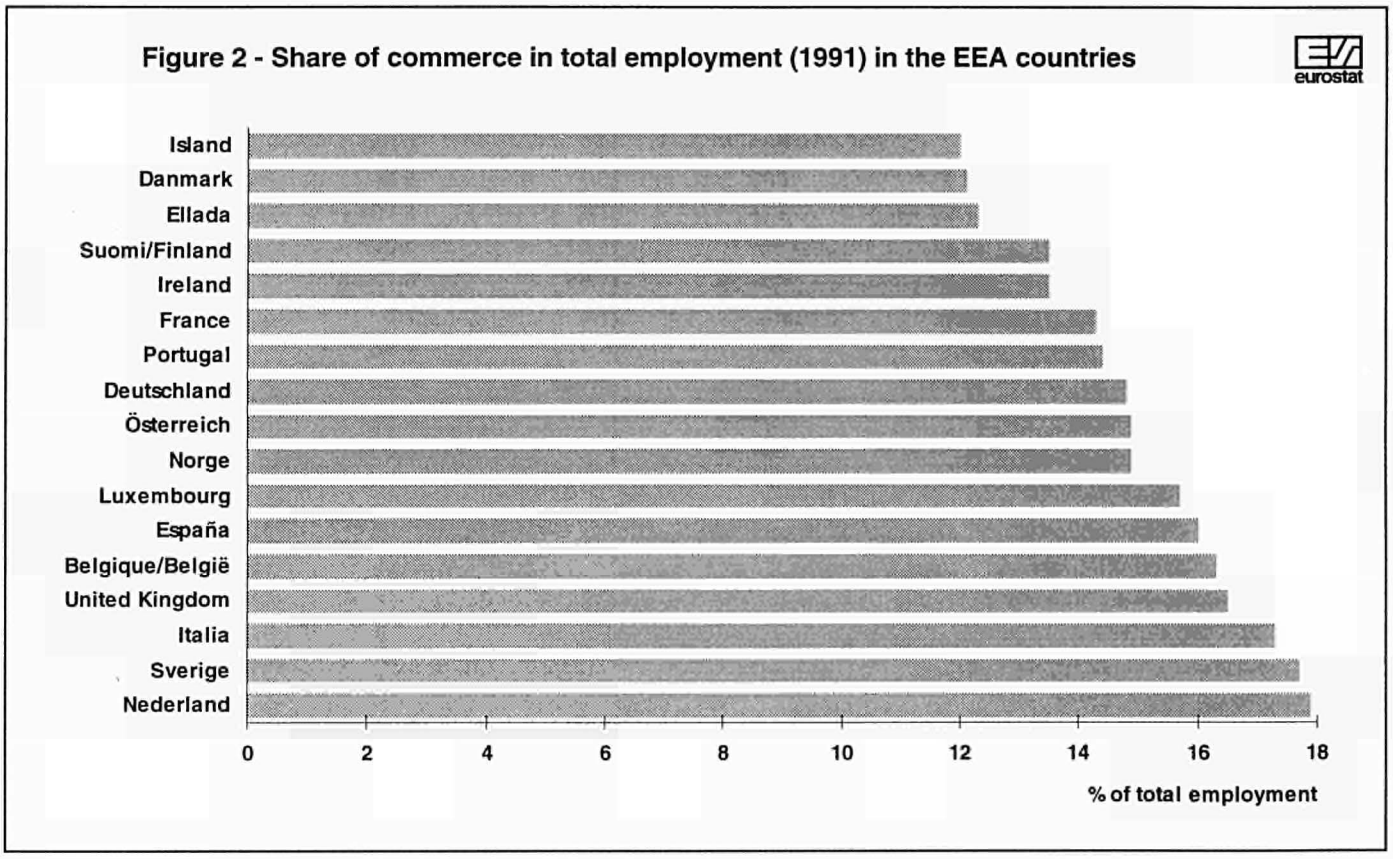


Figure 2 - Share of commerce in total employment (1991) in the EEA countries
eurostat
Island
Danmark
Ellada
Suomi/Finland
Ireland
France
Portugal
Deutschland
Österreich
Norge
Luxembourg
España
Belgique/België
United Kingdom
Italia
Sverige
Nederland
0
2
4
6
8
10
12
14
16
18
% of total employment

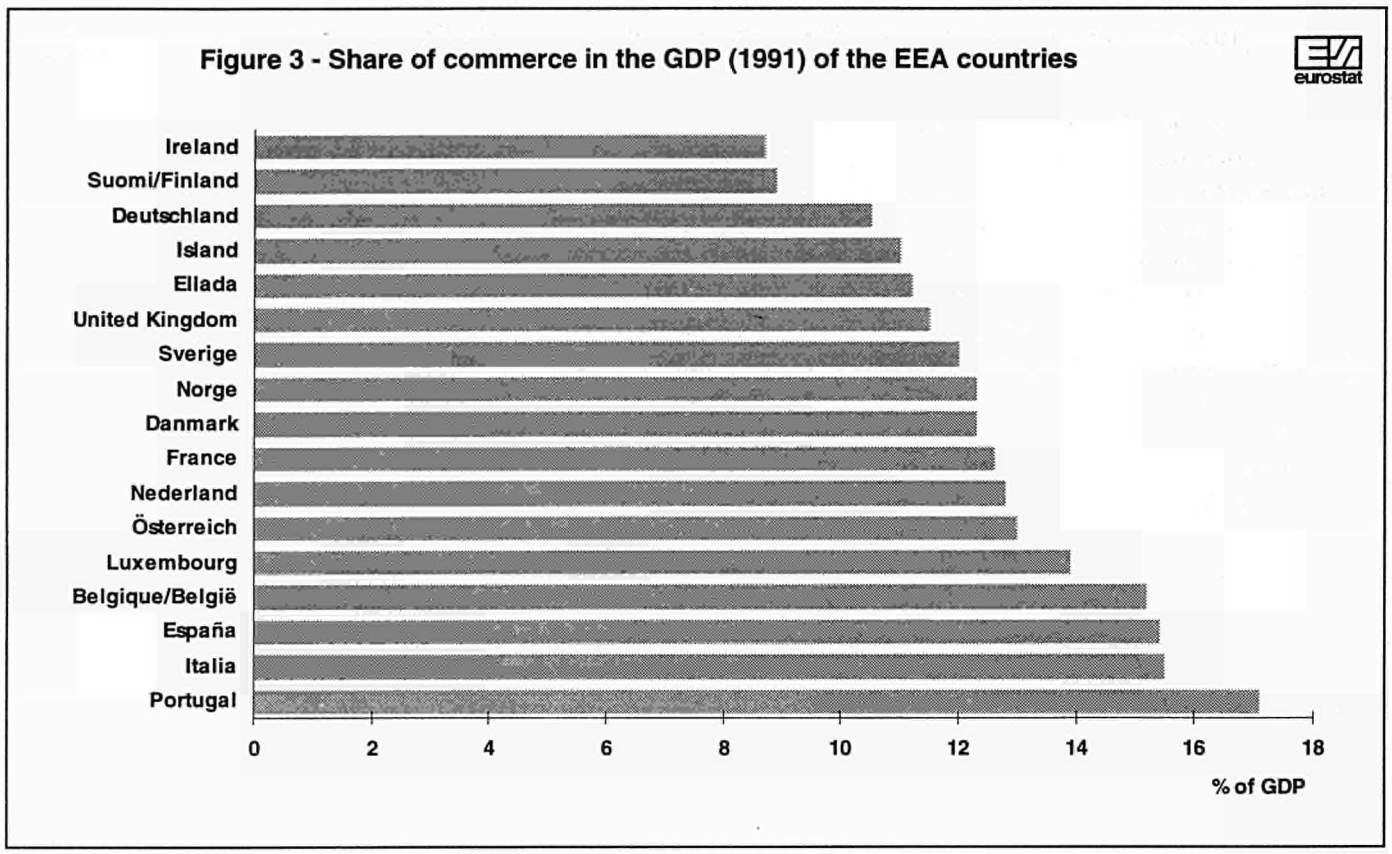


Figure 3 - Share of commerce in the GDP (1991) of the EEA countries
eurostat
Ireland
Suomi/Finland
Deutschland
Island
Ellada
United Kingdom
Sverige
Norge
Danmark
France
Nederland
Österreich
Luxembourg
Belgique/België
España
Italia
Portugal
0
2
4
6
8
10
12
14
16
18
% of GDP

## 1.2. Distribution of total commerce between the countries of the European Economic Area

Five countries - Germany, Italy, France, the United Kingdom and Spain - account for almost 80% of European commerce. In terms of the number of enterprises, Italy leads with 23.9% of the total, a long way ahead of Spain (15.9%) and Germany (13.2%). In terms of the number of persons employed, Germany has the highest percentage (22.1%), followed by the United Kingdom (17.6%) and Italy (15.4%). Lastly, in terms of value added, Italy is in first place(20.6%), followed by Germany (19.4%) and France (17.5%).

Thus almost one commercial enterprise in four is in Italy, while almost one commercial employee in four is in Germany. These two countries together account for 40% of the value added of European commerce.

**Table 2: Enterprises, employment and value added in European commerce (1990-1994)**

| | Number of enterprises ('000) | | Number of persons employed ('000) | | Value added (million ECU) | |
|---|---|---|---|---|---|---|
| | total[1] | % | total[1] | % | total[2] | % |
| Belgique/België | 196.8 | 4.2 | 509 | 2.3 | 24 257.0 | 3.5 |
| Danmark | 85.4 | 1.8 | 365 | 1.6 | 12 949.2 | 1.8 |
| Deutschland | 621.6 | 13.2 | 4 977 | 22.1 | 136 114.9 | 19.4 |
| Ellada | 245.4 | 5.2 | 579 | 2.6 | 6 396.4 | 0.9 |
| España | 747.9 | 15.9 | 2 350 | 10.4 | 59 967.4 | 8.6 |
| France | 523.3 | 11.1 | 3 015 | 13.5 | 122 219.1 | 17.5 |
| Ireland | 32.7 | 0.7 | 196 | 0.9 | 3 217.9 | 0.5 |
| Italia[3] | 1 124.0 | 23.9 | 3 467 | 15.4 | 144 179.9 | 20.6 |
| Luxembourg | 5.5 | 0.1 | 32 | 0.1 | 1 049.2 | 0.1 |
| Nederland | 178.7 | 3.8 | 1 040 | 4.6 | 30 149.2 | 4.3 |
| Österreich | 58.1 | 1.2 | 486 | 2.2 | 17 410.4 | 2.5 |
| Portugal | 183.5 | 3.9 | 599 | 2.7 | 10 559.0 | 1.5 |
| Suomi/Finland[3] | 46.6 | 1.0 | 205 | 0.9 | 8 706.1 | 1.2 |
| Sverige | 101.1 | 2.1 | 479 | 2.1 | 16 448.2 | 2.3 |
| United Kingdom | 490.9 | 10.4 | 3 951 | 17.6 | 94 193.8 | 13.5 |
| TOTAL EUR 15 | 4 641.5 | 98.7 | 22 250 | 98.9 | 687 818.6 | 98.2 |
| Island[3] | 3.1 | 0.1 | 15 | 0.1 | 597.6 | 0.1 |
| Norge[3] | 58.4 | 1.2 | 230 | 1.0 | 11 691.3 | 1.7 |
| EEA | 4 703.0 | 100.0 | 22 495 | 100.0 | 700 107.5 | 100.0 |
| United States | 1 953.0 | | 18 429 | | | |
| Japan | 1 600.0 | | 11 183 | | | |

[1] 1988-1994.
[2] 1991 ESA National Accounts: Detailed tables by branch.
[3] Number of persons employed: full-time equivalent.
Source: Eurostat.

**Figure 4 - Breakdown of commerce in the EEA by value added**

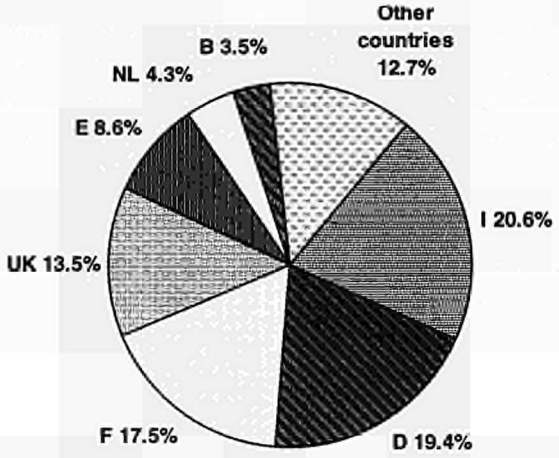



**Figure 5 - Breakdown of commerce in the EEA by number of enterprises**

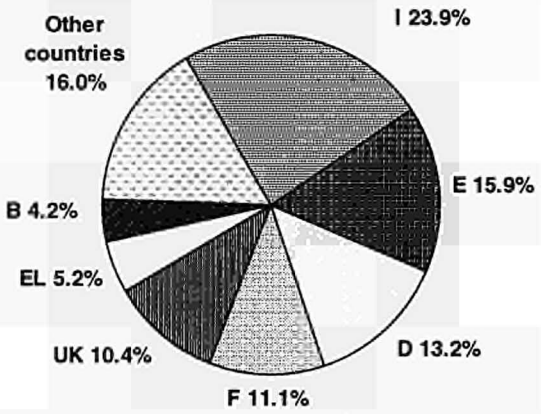
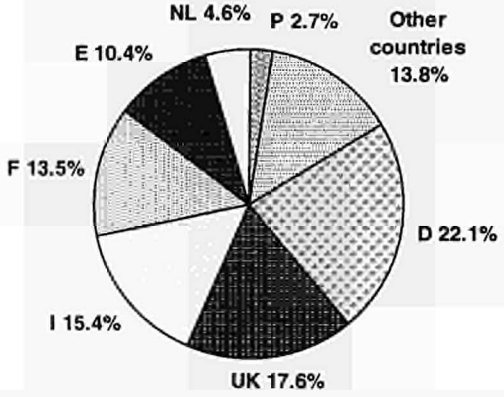



**Figure 6 - Breakdown of commerce in the EEA by number of persons employed**



## 1.3. The three categories of commercial operators: intermediaries, wholesalers and retailers

**Table 3: Breakdown in % of enterprises and persons employed by category**

| | Enterprises | Number of persons employed |
|---|---|---|
| Intermediaries | 6.7 | 3.1 |
| Wholesalers | 19.6 | 28.7 |
| Retailers | 73.7 | 68.2 |
| Total | 100.0 | 100.0 |

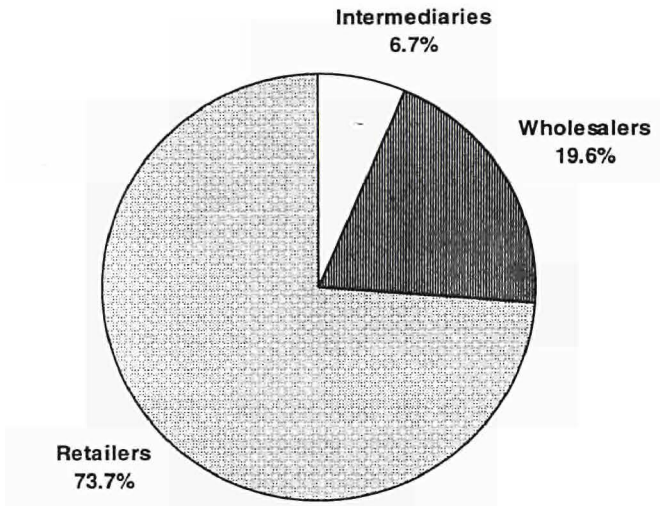
### 1.3.1. Breakdown of enterprises by category

The economic purpose of commerce is to act as an interface between the supply of goods, i.e. production and imports, and demand, i.e. final or intermediate consumption, investment and exports. Three categories of operators are involved, each playing a very different role: intermediaries, who are not traders in the strict sense of the term, since they do not buy the goods and merely bring together sellers and buyers and charge a percentage commission; wholesalers, in the strict sense, who buy and then sell on to users or professional retailers; and lastly retailers, who generally sell to private individuals. For the first time, we can now distinguish between these three categories of operators, in terms of both the number of enterprises and the number of persons employed, for most of the countries in the European Economic Area (see Figures 7, 9 and 10 and Tables 3, 4 and 5).

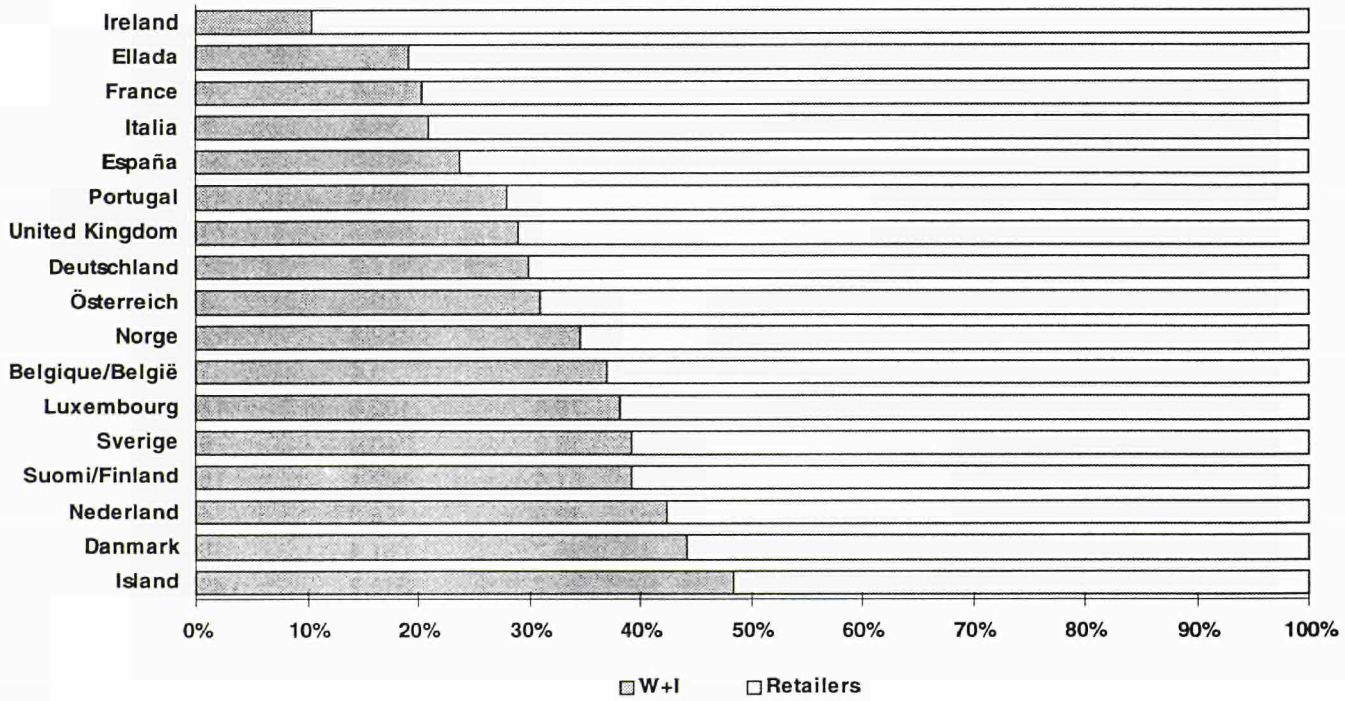
**Table 4: Breakdown of enterprises by category (Unit=1 000)**

| | Intermediaries | Wholesalers | Sub-total W+I | Retailers | Total W+I+R | Year |
|---|---|---|---|---|---|---|
| Belgique/België | 20.9 | 52.1 | 72.9 | 123.8 | 196.8 | 1991 |
| Danmark | 2.2 | 35.7 | 37.8 | 47.6 | 85.4 | 1992 |
| Deutschland | 62.2 | 123.9 | 186.1 | 435.5 | 621.6 | 1993 |
| Ellada | 13.2 | 33.6 | 46.8 | 198.6 | 245.4 | 1993 |
| España | 46.2 | 132.0 | 178.2 | 569.7 | 747.9 | 1992 |
| France | 21.9 | 84.2 | 106.1 | 417.2 | 523.3 | 1994 |
| Ireland | 0.3 | 3.0 | 3.4 | 29.3 | 32.7 | 1993 |
| Italia | 106.1 | 129.5 | 235.6 | 888.3 | 1 124.0 | 1991 |
| Luxembourg | 0.2 | 1.9 | 2.1 | 3.4 | 5.5 | 1993 |
| Nederland | | | 75.8 | 102.9 | 178.7 | 1994 |
| Österreich | 5.0 | 13.0 | 18.0 | 40.0 | 58.1 | 1994 |
| Portugal | 20.4 | 31.0 | 51.4 | 132.1 | 183.5 | 1993 |
| Suomi/Finland | 3.2 | 15.0 | 18.3 | 28.3 | 46.6 | 1993 |
| Sverige | 3.0 | 36.7 | 39.7 | 61.4 | 101.1 | 1993 |
| United Kingdom | : | : | 142.7 | 348.2 | 490.9 | 1991 |
| TOTAL EUR 15 | 314.5 | 900.4 | 1 214.9 | 3 426.5 | 4 641.5 | |
| Island | 0.1 | 1.4 | 1.5 | 1.6 | 3.1 | 1992 |
| Norge | 1.8 | 18.4 | 20.2 | 38.3 | 58.4 | 1993 |
| EEA | 316.4 | 920.2 | 1 236.6 | 3 466.4 | 4 703.0 | |

## Figure 7 - Enterprises by category of operators (1991-1994)




## Figure 8 - Breakdown of commerce enterprises between intermediaries, wholesalers and retailers (1991-1994)



## 1.3.2. Breakdown of persons employed by category of enterprise

**Table 5: Number of persons employed ('000)**

| | Intermediaries | Wholesalers | Sub-total I+W | Retailers | Total I+W+R | Year |
|---|---|---|---|---|---|---|
| Belgique/België | : | : | 234 | 275 | 509 | 1992 |
| Danmark | 6 | 160 | 166 | 199 | 365 | 1992 |
| Deutschland | 148 | 1 545 | 1 692 | 3 285 | 4 977 | 1993 |
| Ellada | 20 | 88 | 108 | 471 | 579 | 1993 |
| España | 86 | 604 | 690 | 1 660 | 2 350 | 1992 |
| France | 70 | 905 | 975 | 2 040 | 3 015 | 1994 |
| Ireland | : | : | 45 | 151 | 196 | 1993 |
| Italia | : | : | 1 078 | 2 389 | 3 467 | 1990 |
| Luxembourg | 1 | 12 | 12 | 20 | 32 | 1993 |
| Nederland | : | : | 403 | 637 | 1 040 | 1994 |
| Österreich | 8 | 189 | 196 | 290 | 486 | 1994 |
| Portugal | 56 | 179 | 235 | 364 | 599 | 1993 |
| Suomi/Finland | 5 | 84 | 89 | 116 | 205 | 1993 |
| Sverige | : | : | 191 | 288 | 479 | 1993 |
| United Kingdom | : | : | 921 | 3 030 | 3 951 | 1991 |
| TOTAL EUR 15 | 696 | 6 428 | 7 035 | 15 215 | 22 250 | |
| Island | : | : | 7 | 8 | 15 | 1992 |
| Norge | 3 | 104 | 107 | 123 | 230 | 1993 |
| EEA | 700 | 6 449 | 7 149 | 15 346 | 22 495 | |

Figures 8 and 10 enable us to rank the countries of the EEA according to the relative importance of their inter-professional commerce (wholesale trade and intermediaries) and their retail trade. It can be seen that the countries in which inter-professional trade predominates, in terms of both the number of enterprises and employment, are Austria and the northern European countries: Luxembourg, Belgium, Sweden, Finland, Norway, the Netherlands and Denmark. All of them are, by virtue of their geographical situation, at the heart of international trade, while their national markets are relatively limited.

**Figure 9 - Number of persons employed by category of operators (1991-1994)**

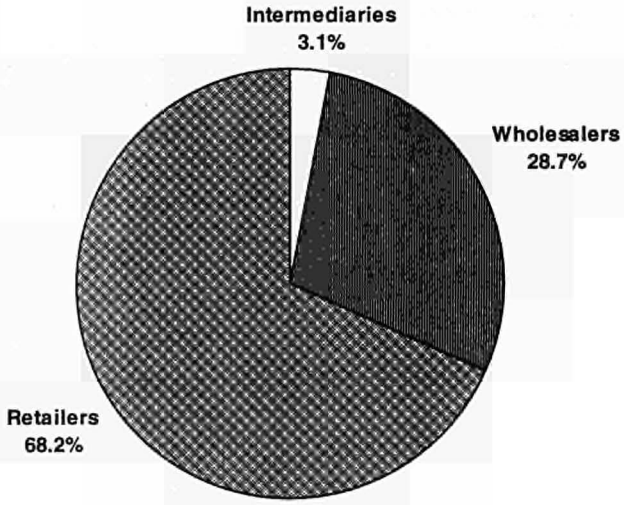
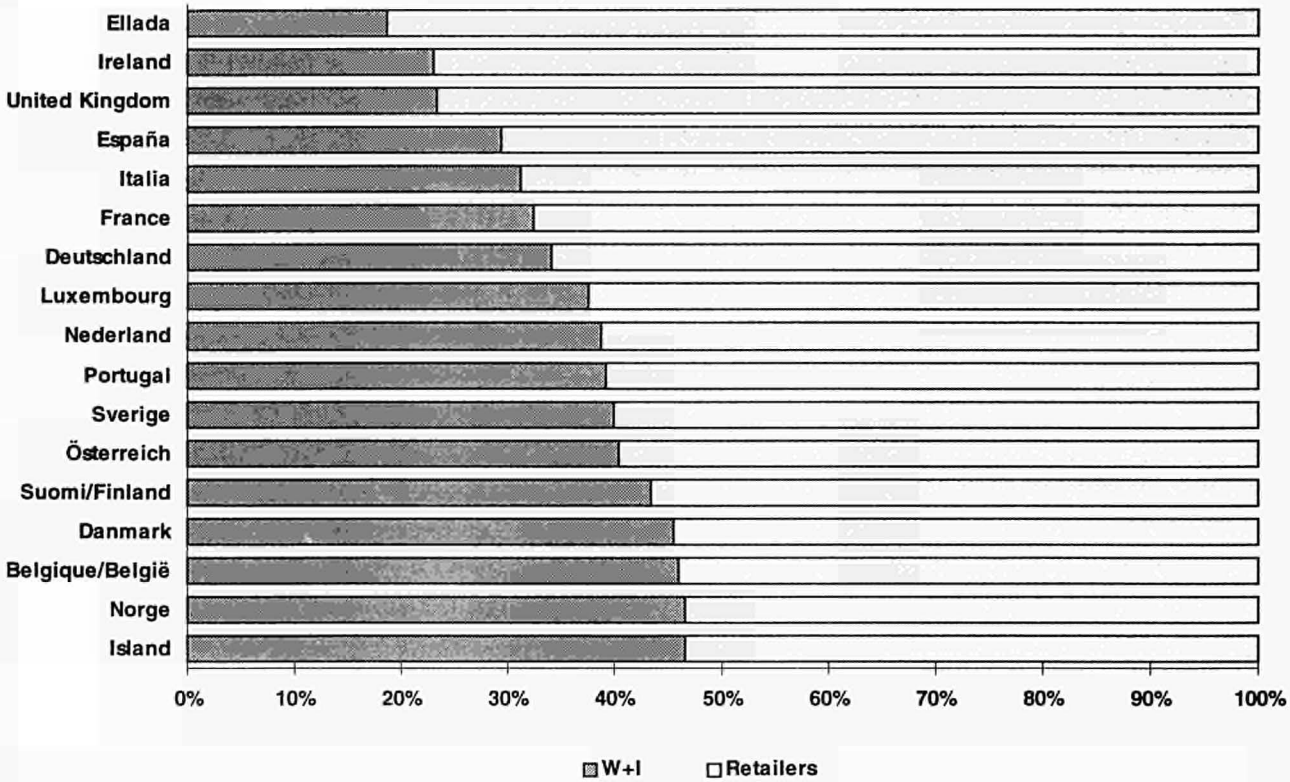



**Figure 10 - Breakdown of employment in commerce between intermediaries, wholesalers and retailers (1991-1994)**



# PART 2: Wholesale distribution and intermediaries

## 2.1. Distribution of wholesale trade between the countries of the European Economic Area

Wholesale distribution in the European Economic Area consists of 1.1 million enterprises employing 7 million people. Table 6 shows the relative importance of wholesale distribution in each EEA country and provides a basis for comparison with the United States and Japan.
Employment is the best indicator of relative importance. Four countries - Germany, Italy, France and the United Kingdom - account for over 67% of employment in this sector. Germany alone accounts for almost 25%. If a fifth country - Spain - is added, the figure rises to 75% of employment in European wholesale distribution. In terms of the number of enterprises, the picture is slightly less concentrated. The first four countries account for 61%. Italy, the country of small and medium-sized enterprises, is in the lead with 21% of enterprises.

**Table 6:**
**Enterprises and employment in wholesale distribution[1] in the European Economic Area (1990-1994)**

| | Enterprises ('000) | | Number of persons employed ('000) | |
|---|---|---|---|---|
| | total | % | total | % |
| Belgique/België | 72.9 | 5.9 | 234 | 3.3 |
| Danmark | 37.8 | 3.1 | 166 | 2.3 |
| Deutschland | 186.1 | 15.0 | 1 692 | 23.7 |
| Ellada | 46.8 | 3.8 | 108 | 1.5 |
| España | 178.2 | 14.4 | 690 | 9.7 |
| France | 106.1 | 8.6 | 975 | 13.6 |
| Ireland | 3.4 | 0.3 | 45 | 0.6 |
| Italia[2] | 235.6 | 19.1 | 1 078 | 15.1 |
| Luxembourg | 2.1 | 0.2 | 12 | 0.2 |
| Nederland | 75.8 | 6.1 | 403 | 5.6 |
| Österreich | 18.0 | 1.5 | 196 | 2.7 |
| Portugal | 51.4 | 4.2 | 235 | 3.3 |
| Suomi/Finland [2] | 18.3 | 1.5 | 89 | 1.2 |
| Sverige | 39.7 | 3.2 | 191 | 2.7 |
| United Kingdom | 142.7 | 11.5 | 921 | 12.9 |
| TOTAL EUR 15 | 1 214.9 | 98.2 | 7 035 | 98.4 |
| Island[2, 3] | 1.5 | 0.1 | 7 | 0.1 |
| Norge[2, 4] | 20.2 | 1.6 | 107 | 1.5 |
| EEA | 1 236.6 | 100.0 | 7 149 | 100.0 |
| United States | 363.9 | | 5 609 | |
| Japan | 300.0 | | 4 332 | |

[1] Including intermediaries.
[2] Number of persons employed: full-time equivalent.
[3] Wholesale distribution: including motor vehicles.
[4] Data on establishments.

**Figure 11 - Wholesale distribution enterprises: breakdown by country**

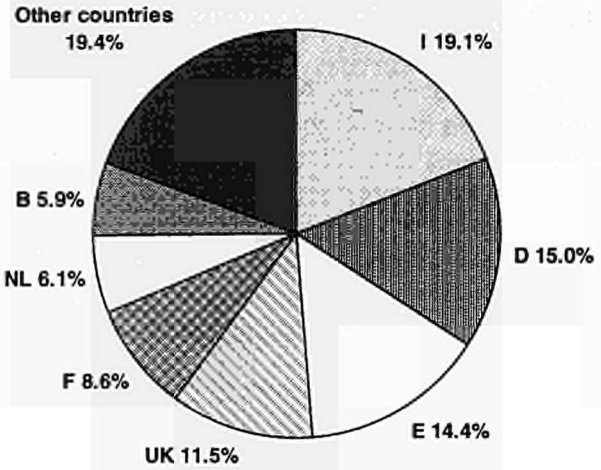
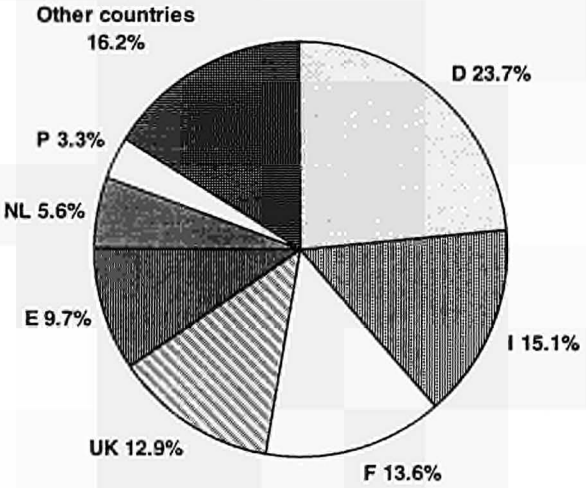


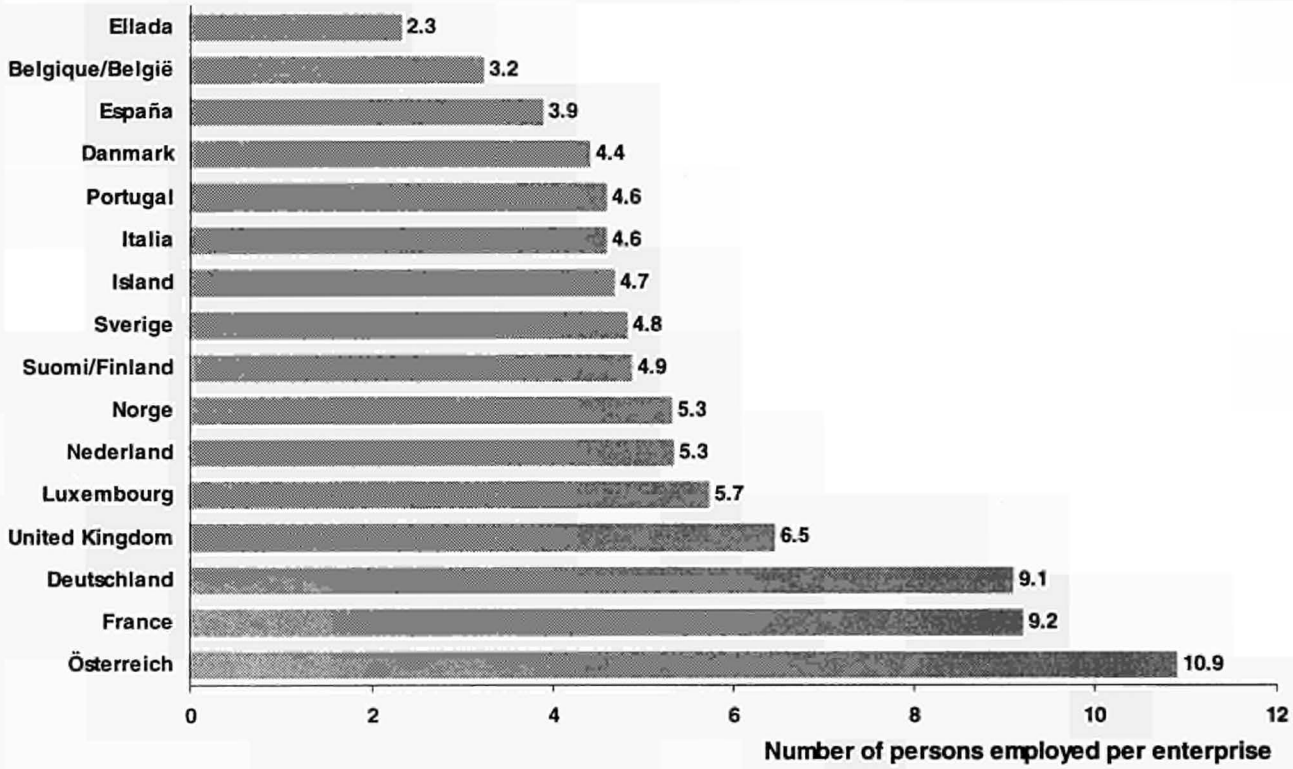

**Figure 12 - Number of persons employed in wholesale distribution: breakdown by country**



## 2.2. Persons employed per enterprise in wholesale distribution

The average size of wholesale enterprises (including intermediaries) varies considerably from one country to another, as shown in Figure 13. Allowance should be made for flaws in the statistics, which may cast doubt on the plausibility of certain extreme ratios. Among the countries with well-developed wholesale distribution, there is a group, comprising Denmark, Portugal, Italy, Sweden, Finland, Norway and the Netherlands, in which the number of persons employed per enterprise is between 4 and 6. In contrast, the figure is approximately 9 in Germany and France and almost 11 in Austria. It is clear that there are a number of different wholesale "cultures" in Europe. They do not seem to depend on land area, geographical situation or population size.

**Figure 13 - Number of persons employed per enterprise in wholesale distribution (1990-1994)**



## 2.3. Breakdown of wholesale enterprises by sector of activity

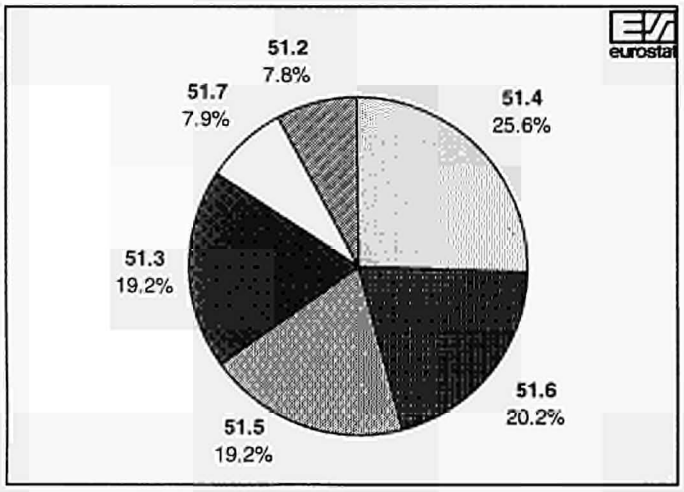
### NACE REV. 1

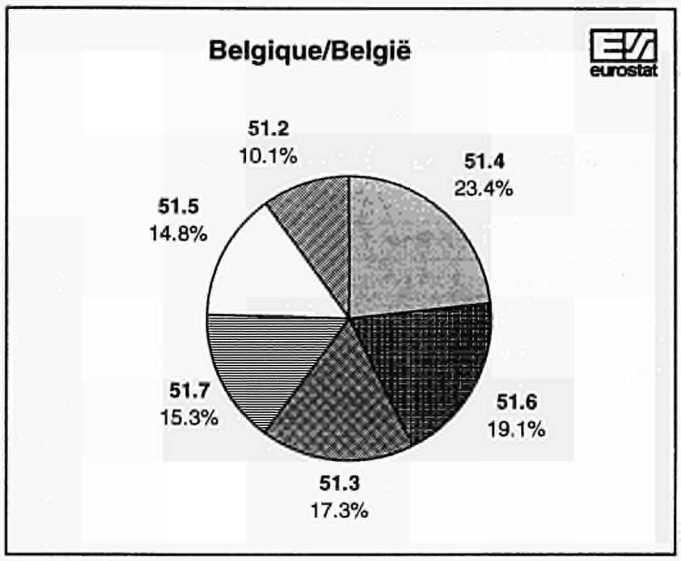
51 - Wholesale trade and commission trade, except of motor vehicles and motorcycles.
51.1 - Wholesale on a fee or contract basis.
51.2 - Wholesale of agricultural raw materials and live animals.
51.3 - Wholesale of food, beverages and tobacco.
51.4 - Wholesale of household goods.
51.5 - Wholesale of non-agricultural intermediate products, waste and scrap.
51.6 - Wholesale of machinery, equipment and supplies.
51.7 - Other wholesale.

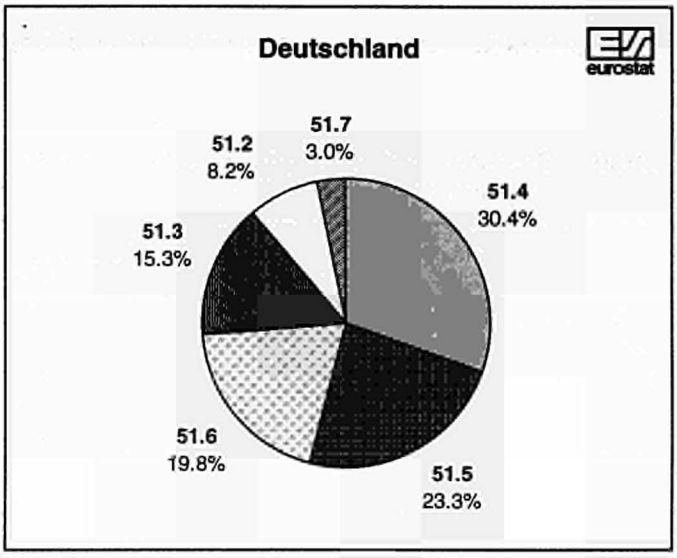
**Table 7: Breakdown in % of wholesale enterprises (excluding intermediaries) by sector of activity**

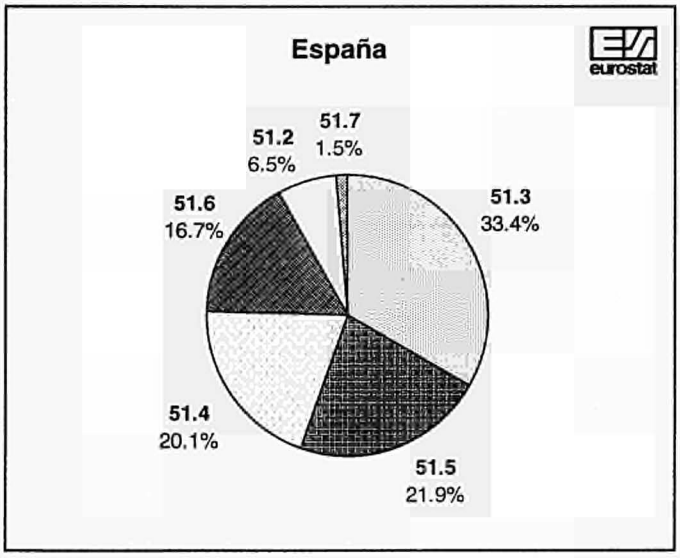
| | NACE Rev. 1 | | | | | | |
|---|---|---|---|---|---|---|---|
| | 51.2 | 51.3 | 51.4 | 51.5 | 51.6 | 51.7 | Year |
| Belgique/België | 10.1 | 17.3 | 23.4 | 14.8 | 19.1 | 15.3 | 1991 |
| Danmark | 6.0 | 13.4 | 31.5 | 15.9 | 25.5 | 7.7 | 1993 |
| Deutschland | 8.2 | 15.3 | 30.4 | 23.3 | 19.8 | 3.0 | 1993 |
| Ellada | 5.0 | 19.7 | 17.4 | 15.9 | 11.4 | 30.6 | 1993 |
| España | 6.5 | 33.4 | 20.1 | 21.9 | 16.7 | 1.5 | 1992 |
| France | 10.0 | 19.2 | 17.6 | 15.8 | 27.1 | 10.3 | 1992 |
| Ireland | 6.0 | 24.7 | 19.3 | 12.8 | 20.8 | 16.4 | 1993 |
| Italia | 8.5 | 26.1 | 31.8 | 21.2 | 11.3 | 1.1 | 1991 |
| Luxembourg | 5.0 | 13.4 | 16.4 | 21.5 | 30.3 | 13.5 | 1993 |
| Nederland | 10.8 | 12.8 | 28.6 | 16.7 | 21.4 | 9.7 | 1993 |
| Österreich | 8.9 | 9.9 | 26.4 | 25.5 | 22.5 | 6.7 | 1994 |
| Portugal | 7.0 | 22.3 | 21.9 | 11.3 | 8.9 | 28.7 | 1993 |
| Suomi/Finland | 0.0 | 8.0 | 15.4 | 22.2 | 32.7 | 21.7 | 1992 |
| Sverige | 1.6 | 7.5 | 28.4 | 21.3 | 41.2 | 0.0 | 1992 |
| United Kingdom | : | : | : | : | : | : | |
| TOTAL EUR 15 | 7.9 | 19.4 | 25.9 | 19.3 | 19.8 | 7.8 | |
| Island | : | : | : | : | : | : | |
| Norge | 3.6 | 9.5 | 16.6 | 15.8 | 41.1 | 13.4 | 1993 |
| EEA | 7.8 | 19.2 | 25.6 | 19.2 | 20.2 | 7.9 | |

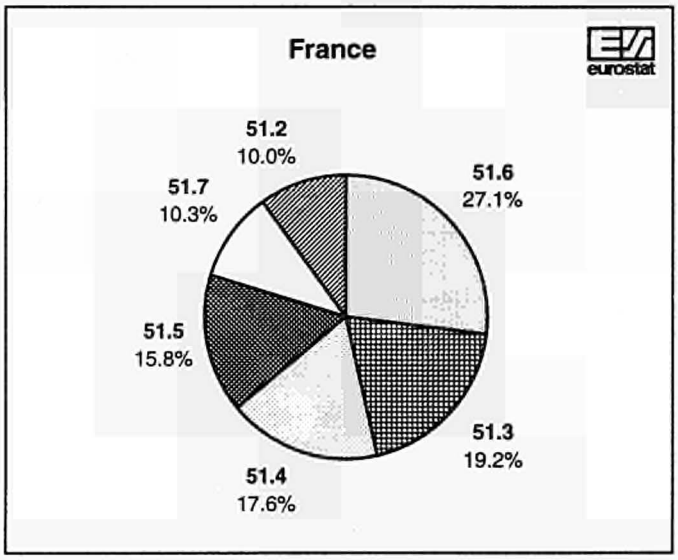
**Figure 14 - Total EEA**

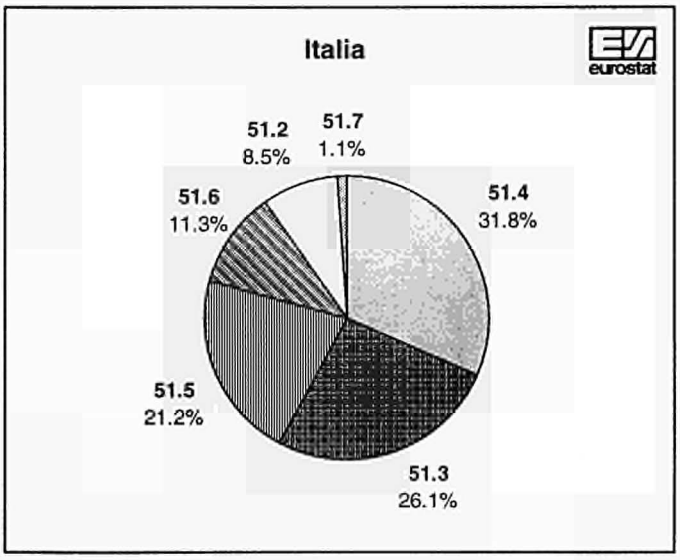


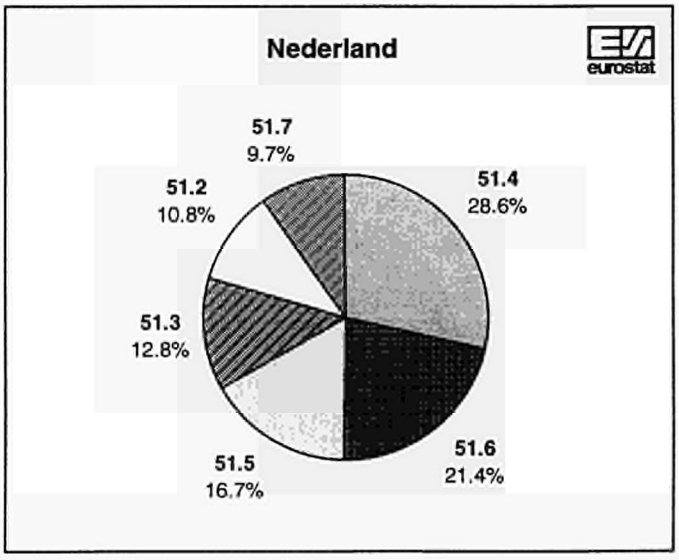

Belgique/België
eurostat
51.2
10.1%
51.4
23.4%
51.5
14.8%
51.7
15.3%
51.6
19.1%
51.3
17.3%


Deutschland
eurostat
51.7
3.0%
51.2
8.2%
51.4
30.4%
51.3
15.3%
51.6
19.8%
51.5
23.3%


España
eurostat
51.7
1.5%
51.2
6.5%
51.6
16.7%
51.3
33.4%
51.4
20.1%
51.5
21.9%


France
eurostat
51.2
10.0%
51.6
27.1%
51.7
10.3%
51.5
15.8%
51.3
19.2%
51.4
17.6%


Italia
eurostat
51.2
8.5%
51.7
1.1%
51.6
11.3%
51.4
31.8%
51.5
21.2%
51.3
26.1%


Nederland
eurostat
51.7
9.7%
51.2
10.8%
51.4
28.6%
51.3
12.8%
51.5
16.7%
51.6
21.4%

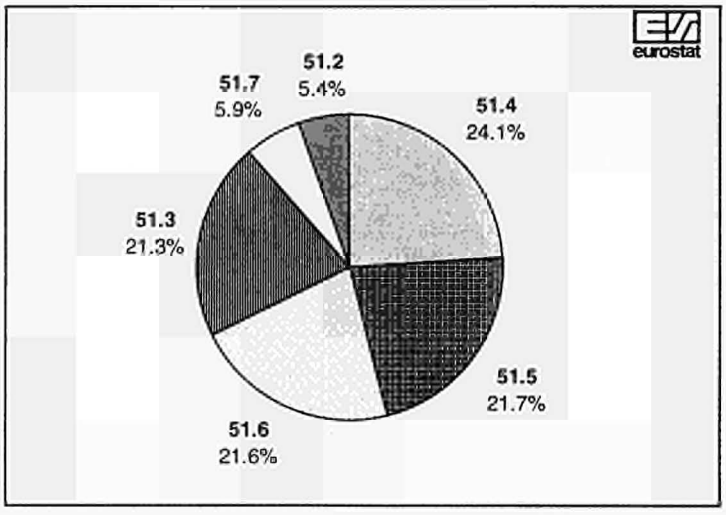
## 2.4. Breakdown of employment in wholesale distribution by sector of activity

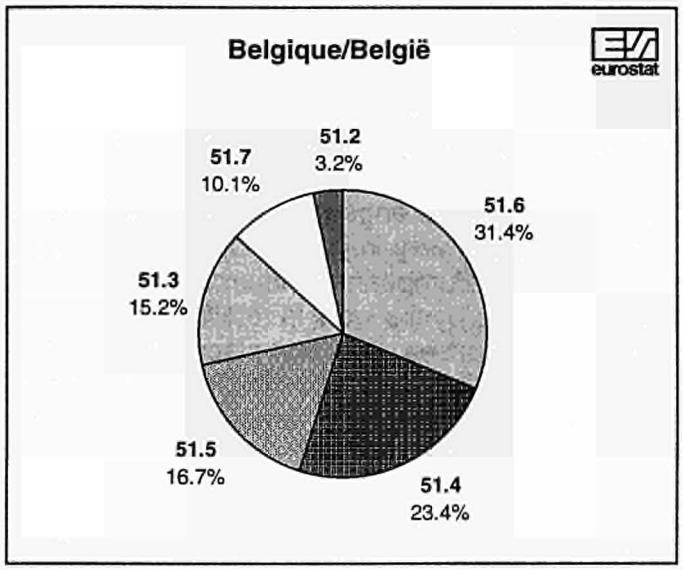
**Table 8: Breakdown in % of employment in wholesale distribution (excluding intermediaries) by sector of main activity**

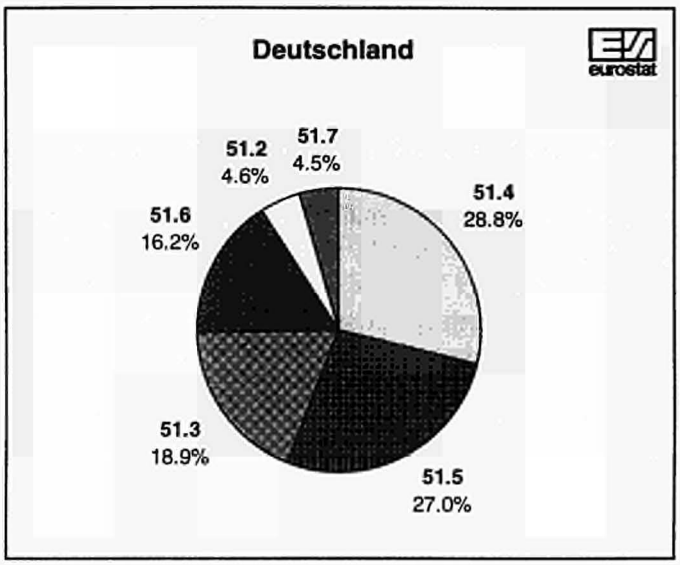
| | NACE Rev. 1 | | | | | | |
|---|---|---|---|---|---|---|---|
| | 51.2 | 51.3 | 51.4 | 51.5 | 51.6 | 51.7 | Year |
| Belgique/België | 3.2 | 15.2 | 23.4 | 16.7 | 31.4 | 10.1 | 1992 |
| Danmark | 7.6 | 15.4 | 20.4 | 22.2 | 31.3 | 3.2 | 1993 |
| Deutschland | 4.6 | 18.9 | 28.8 | 27.0 | 16.2 | 4.5 | 1993 |
| Ellada | 6.3 | 15.9 | 24.0 | 15.4 | 15.3 | 23.2 | 1993 |
| España | 3.8 | 34.4 | 21.8 | 20.2 | 17.8 | 2.0 | 1992 |
| France | 7.4 | 20.1 | 18.7 | 18.9 | 28.0 | 7.0 | 1992 |
| Ireland | 5.0 | 26.5 | 17.2 | 17.3 | 20.4 | 13.7 | 1993 |
| Italia | 4.9 | 27.1 | 31.1 | 21.4 | 13.1 | 2.4 | 1991 |
| Luxembourg | 3.5 | 24.9 | 14.9 | 20.4 | 29.9 | 6.4 | 1993 |
| Nederland | 8.5 | 15.5 | 22.6 | 19.9 | 28.2 | 5.2 | 1993 |
| Österreich | 9.5 | 16.4 | 25.5 | 25.7 | 21.2 | 1.7 | 1994 |
| Portugal | 4.1 | 25.5 | 19.1 | 13.1 | 12.9 | 25.4 | 1993 |
| Suomi/Finland | 0.0 | 8.7 | 12.4 | 19.4 | 37.2 | 22.4 | 1992 |
| Sverige | 3.1 | 15.7 | 18.5 | 23.6 | 39.0 | 0.0 | 1992 |
| United Kingdom | : | : | : | : | : | : | |
| TOTAL EUR 15 | 5.4 | 21.4 | 24.3 | 21.8 | 21.2 | 5.8 | |
| Island | : | : | : | : | : | : | |
| Norge | 3.5 | 15.7 | 14.3 | 16.8 | 40.2 | 9.5 | 1993 |
| EEA | 5.4 | 21.3 | 24.1 | 21.7 | 21.6 | 5.9 | |

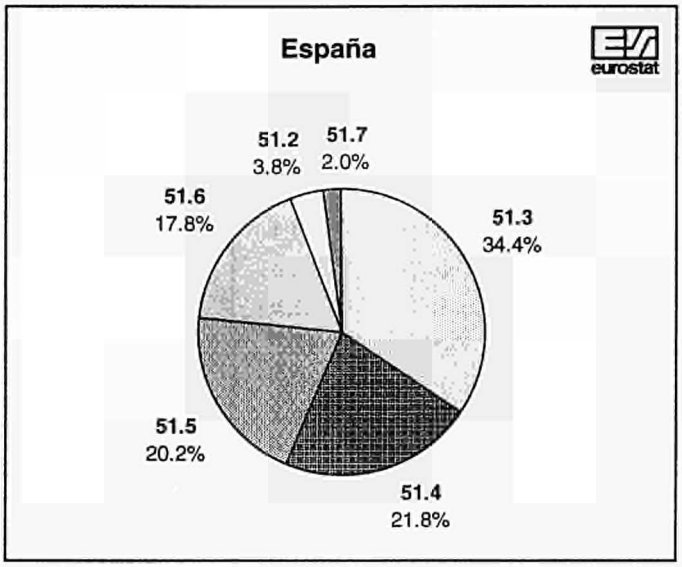
The analysis of wholesale distribution, excluding intermediaries, according to the six divisions of NACE Rev.1 for all the EEA countries shows a predominance of division 51.4 (Wholesale of household goods) in terms of both the number of enterprises and employment. The percentages are, respectively, 25.6% and 24.1%. Once again, however, there are considerable disparities between the countries - for example, the very great predominance of wholesale of machinery, equipment and supplies in Sweden and Norway and, to a lesser extent, in Finland, Luxembourg and even France. In contrast, wholesale distribution of food predominates in Spain and Ireland.

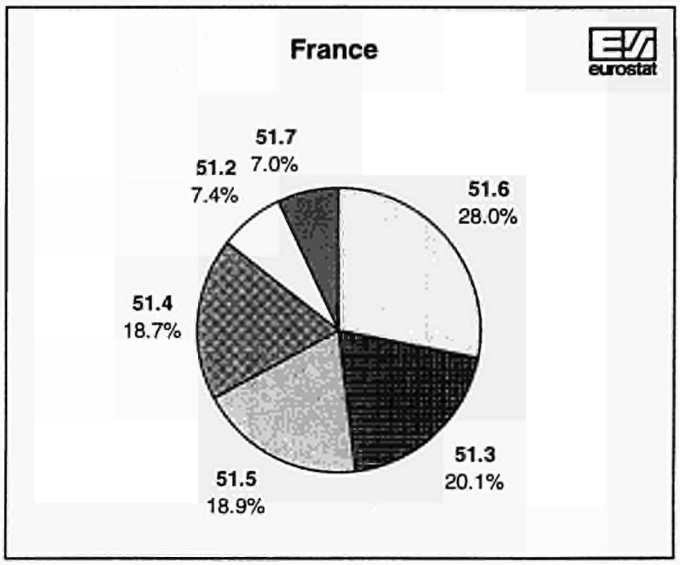
**Figure 15 - Total EEA**

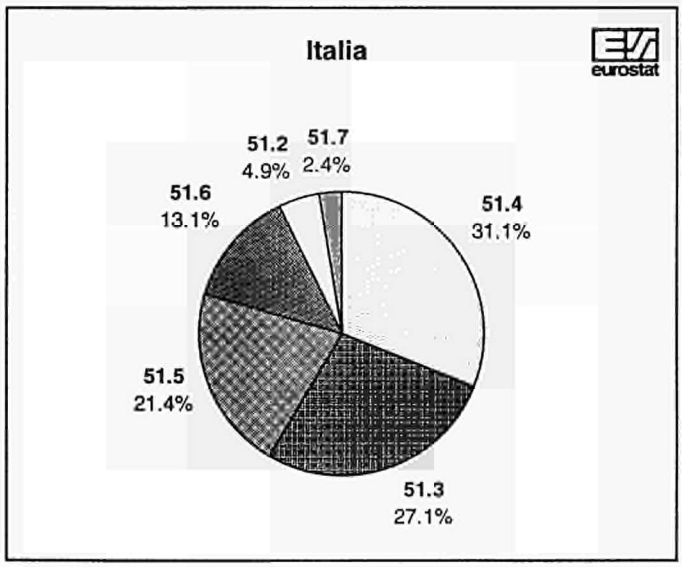


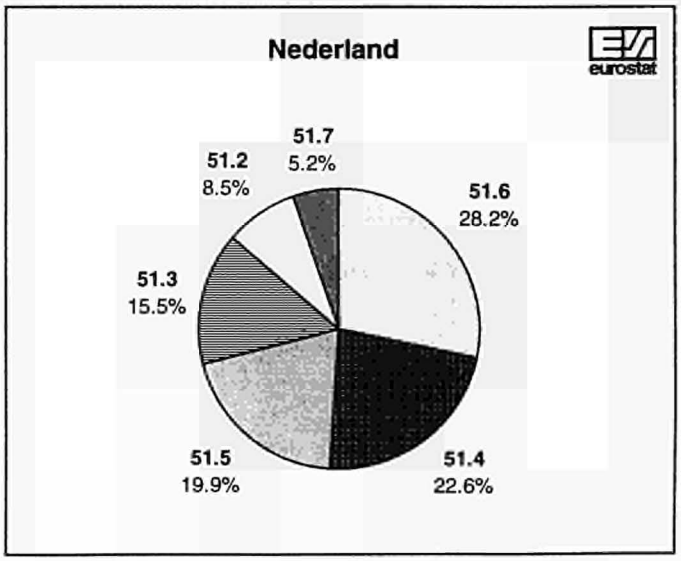

Belgique/België
eurostat
51.2
3.2%
51.7
10.1%
51.6
31.4%
51.3
15.2%
51.5
16.7%
51.4
23.4%


Deutschland
eurostat
51.2
4.6%
51.7
4.5%
51.4
28.8%
51.6
16.2%
51.3
18.9%
51.5
27.0%


España
eurostat
51.2
3.8%
51.7
2.0%
51.6
17.8%
51.3
34.4%
51.5
20.2%
51.4
21.8%


France
eurostat
51.7
7.0%
51.2
7.4%
51.6
28.0%
51.4
18.7%
51.3
20.1%
51.5
18.9%


Italia
eurostat
51.2
4.9%
51.7
2.4%
51.6
13.1%
51.4
31.1%
51.5
21.4%
51.3
27.1%


Nederland
eurostat
51.7
5.2%
51.2
8.5%
51.6
28.2%
51.3
15.5%
51.5
19.9%
51.4
22.6%

# PART 3: Retail distribution

## 3.1 Distribution of retail trade between the countries of the European Economic Area

In Europe almost 3.5 million enterprises employing 15.2 million people are engaged in retail distribution, i.e. the resale of goods mainly to private individuals. This makes it a very important sector of activity from the point of view of enterprise policy and employment policy. In European commerce, three out of four heads of enterprises are retailers and almost two out of three employees work in retailing.
With regard to the distribution of enterprises, Italy, with 26% of enterprises, is in first place, followed by Spain (17%) and Germany (13%). As for employment and turnover, Germany and the United Kingdom share the lead, but while the former, with 22% of jobs, accounts for 27% of the turnover in European retail distribution, the latter, with 20% of jobs, accounts for only 17% of turnover.

**Table 9: Enterprises, employment and turnover of retail distribution in the European Economic Area (1990-1994)**

| | Number of enterprises | | Number of persons employed | | Turnover[4] |
|---|---|---|---|---|---|
| | total | % | total | % | % |
| Belgique/België | 123.8 | 3.6 | 275 | 1.8 | 3.1 |
| Danmark | 47.6 | 1.4 | 199 | 1.3 | 1.5 |
| Deutschland | 435.5 | 12.6 | 3 285 | 21.6 | 26.1 |
| Ellada | 198.6 | 5.7 | 471 | 3.1 | 1.2 |
| España | 569.7 | 16.4 | 1 537 | 10.1 | 7.3 |
| France | 417.2 | 12.0 | 2 040 | 13.4 | 15.7 |
| Ireland | 29.3 | 0.8 | 151 | 1.0 | 0.7 |
| Italia[1] | 888.3 | 25.6 | 2 389 | 15.7 | 13.9 |
| Luxembourg | 3.4 | 0.1 | 20 | 0.1 | 0.2 |
| Nederland | 102.9 | 3.0 | 637 | 4.2 | 4.2 |
| Österreich | 40.0 | 1.2 | 290 | 1.9 | 2.3 |
| Portugal | 132.1 | 3.8 | 364 | 2.4 | 1.6 |
| Suomi/Finland[1] | 28.3 | 0.8 | 116 | 0.8 | 1.1 |
| Sverige | 61.4 | 1.8 | 288 | 1.9 | 2.4 |
| United Kingdom | 348.2 | 10.0 | 3 030 | 19.9 | 17.1 |
| TOTAL EUR 15 | 3 426.3 | 98.8 | | 99.1 | 98.5 |
| Island[1, 2] | 1.6 | 0.1 | 8 | 0.1 | 0.1 |
| Norge[1, 3] | 38.3 | 1.1 | 123 | 0.8 | 1.5 |
| EEA | 3 466.2 | 100.0 | 15 223 | 100.0 | 100.0 |

[1] Number of persons employed: full-time equivalent.
[2] Retail distribution, excluding motor vehicles.
[3] Data on local units.
[4] Absolute values are given in Table 13, page 33.

**Figure 16 - Turnover in retail distribution: breakdown country in %**

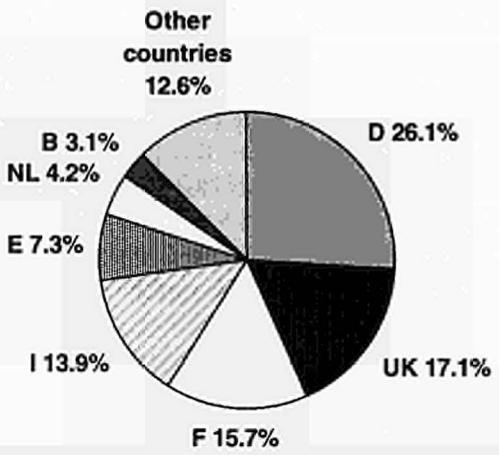



**Figure 17 - Number of enterprises in retail distribution: breakdown by country in %**

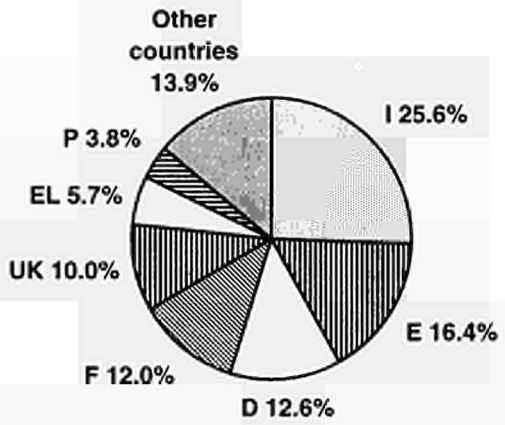
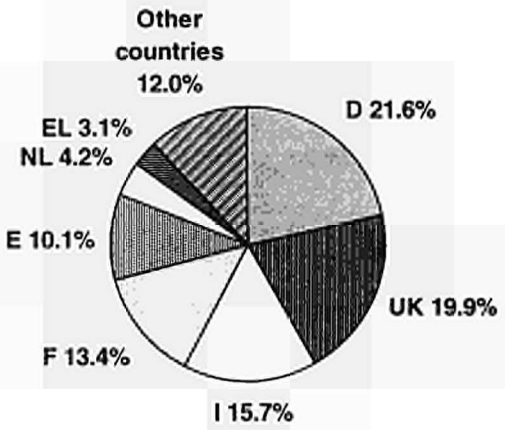



**Figure 18 - Number of persons employed in retail distribution: breakdown by country in %**



## 3.2. Employment characteristics in retail distribution

At the beginning of the 1990s, slightly more than 70% of the active population in commerce were employees and slightly more than 55% were women, and part-time working was particularly prevalent (almost 28% of total employment). The Mediterranean countries of Greece, Italy and Spain had the fewest employees: in these countries there is still a predominance of self-employed traders in this sector. In contrast, in the countries of northern Europe, the percentage of employees is 80% or higher. As regards female employment, the average level (55%) is exceeded in most countries of northern Europe and Austria, while Greece, Spain, France and Italy record female employment levels below the average. The frequency of part-time work appears to be linked to that of female employment and is particularly high in northern European countries. Regulation has curbed its expansion in the Mediterranean countries.

**Table 10: Employment characteristics in retail distribution**

| | Share of total employment (%) | | | |
|---|---|---|---|---|
| | Employees | Women | Part-time workers | Year |
| Belgique/België[1] | 54.1 | 58.1 | 17.4 | 1989 |
| Danmark | 84.9 | 52.5 | 35.0 | 1992 |
| Deutschland | 84.8 | 64.8 | 39.0 | 1993 |
| Ellada[2] | 28.9 | 43.6 | 3.3 | 1988 |
| España | 55.4 | 51.9 | 6.4 | 1992 |
| France[3] | 78.0 | 50.3 | 19.3 | 1993 |
| Ireland[4] | 72.9 | 45.6 | 23.2 | 1991 |
| Italia | 33.6 | 44.4 | : | 1991 |
| Luxembourg[5] | 87.4 | 51.6 | 11.5 | 1993 |
| Nederland[6] | 80.0 | 56.7 | 34.6 | 1990 |
| Österreich[7] | 84.9 | 62.4 | 13.0 | 1991 |
| Portugal | 75.8 | 43.4 | 5.1 | 1993 |
| Suomi/Finland[8] | 81.0 | 68.8 | : | 1993 |
| Sverige | 79.8 | 60.8 | 38.2 | 1993 |
| United Kingdom[8] | 84.4 | 58.4 | 38.4 | 1991 |
| TOTAL EUR 15[9] | 70.5 | 55.2 | 27.9 | |
| Island | 85.8 | : | : | 1992 |
| Norge | 89.0 | 63.0 | 47.0 | 1993 |
| EEA[10, 11] | 70.8 | 55.3 | 28.2 | |

[1] Part-time workers: Eurostat estimate.
[2] Employees and part-time workers: Eurostat estimate.
[3] Women: 1989.
[4] Women: Eurostat estimate 1988.
[5] Women and part-time workers: Eurostat estimate1989.
[6] Women: Eurostat estimate.
[7] Part-time workers: 1988.
[8] Excluding motor vehicle distribution.
[9] Share of part-time workers: excluding Italy and Finland.
[10] Share of women: excluding Iceland.
[11] Share of part-time workers: excluding Italy, Finland and Iceland.
Source: Eurostat.

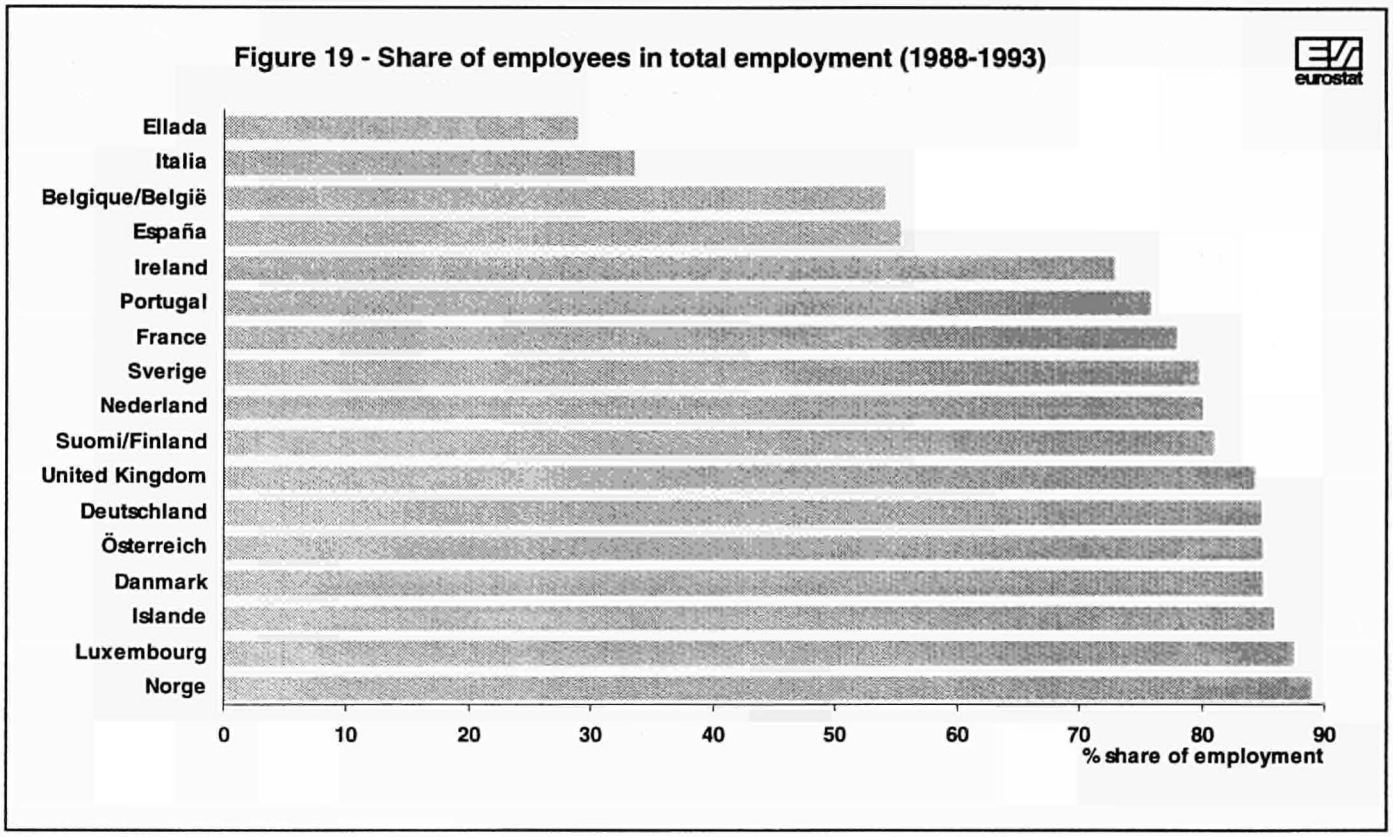


Figure 19 - Share of employees in total employment (1988-1993)
eurostat
Ellada
Italia
Belgique/België
España
Ireland
Portugal
France
Sverige
Nederland
Suomi/Finland
United Kingdom
Deutschland
Österreich
Danmark
Islande
Luxembourg
Norge
0
10
20
30
40
50
60
70
80
90
% share of employment

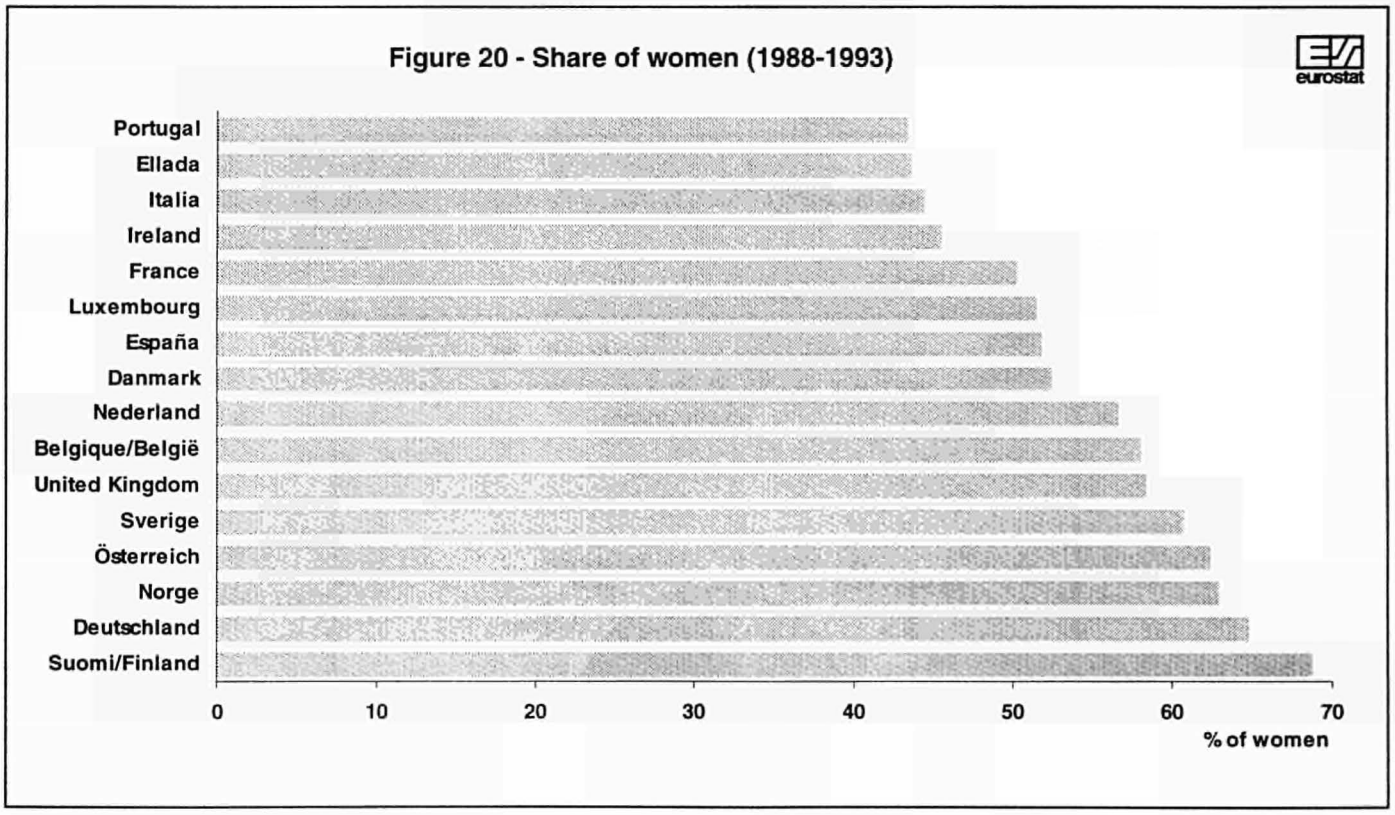


Figure 20 - Share of women (1988-1993)
eurostat
Portugal
Ellada
Italia
Ireland
France
Luxembourg
España
Danmark
Nederland
Belgique/België
United Kingdom
Sverige
Österreich
Norge
Deutschland
Suomi/Finland
0
10
20
30
40
50
60
70
% of women

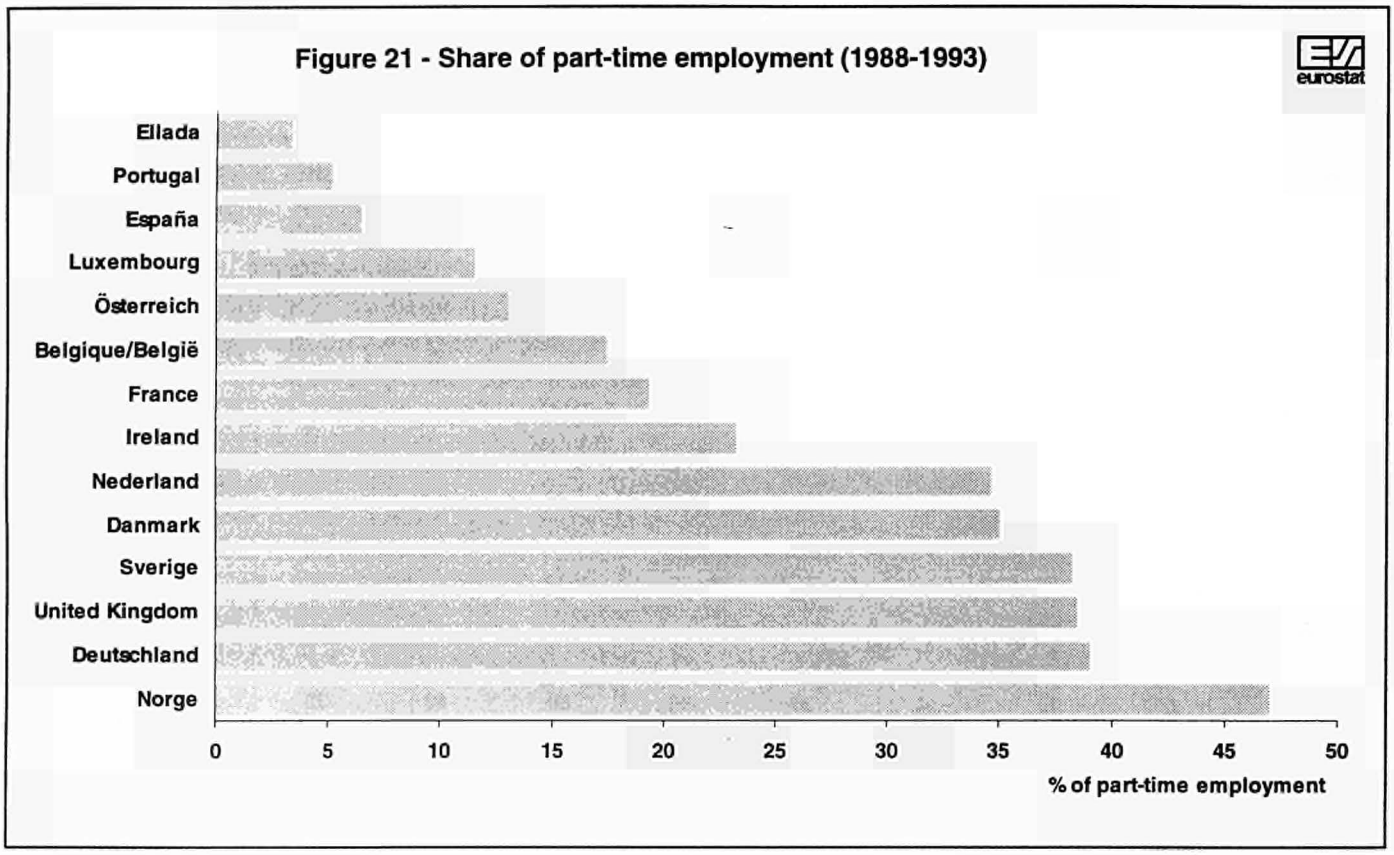


Figure 21 - Share of part-time employment (1988-1993)
eurostat
Ellada
Portugal
España
Luxembourg
Österreich
Belgique/België
France
Ireland
Nederland
Danmark
Sverige
United Kingdom
Deutschland
Norge
0
5
10
15
20
25
30
35
40
45
50
% of part-time employment

## 3.3. The sub-sectors of retail distribution

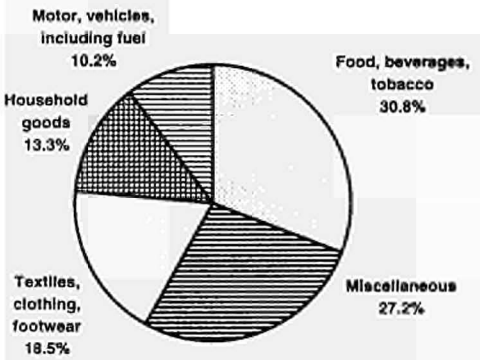
For all the countries of the European Union, almost 31% of enterprises sell mainly food and beverages, 18.5% clothing and footwear and 13.4 % household goods. These percentages vary considerably from one country to another. Thus food distribution is particularly predominant in the Mediterranean countries and in Ireland.

**Table 11: Breakdown of retail enterprises by sector of main activity (%)**

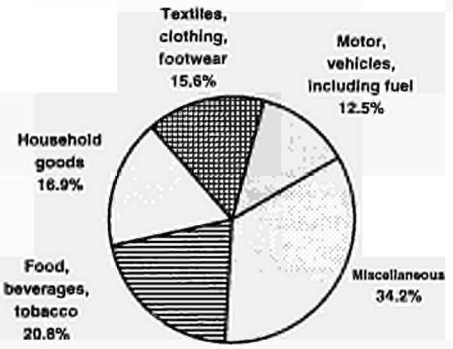
| | Food, beverages, tobacco | Textiles, clothing, footwear | Household equipment | Motor vehicle distribution including fuel | Miscellaneous | Year |
|---|---|---|---|---|---|---|
| Belgique/België | 28.0 | 18.2 | 12.7 | 10.0 | 31.1 | 1988 |
| Danmark | 24.5 | 16.4 | 16.8 | 13.9 | 28.5 | 1992 |
| Deutschland | 20.8 | 15.6 | 16.9 | 12.5 | 34.2 | 1992 |
| Ellada[1] | 29.5 | 19.5 | 14.8 | 7.7 | 28.5 | 1988 |
| España | 39.7 | 20.3 | 13.4 | 3.2 | 23.4 | 1988 |
| France | 26.1 | 19.0 | 11.2 | 15.3 | 28.4 | 1992 |
| Ireland[2] | 54.0 | 9.0 | 4.4 | 11.5 | 21.0 | 1988 |
| Italia | 33.3 | 22.8 | 11.7 | 6.1 | 26.0 | 1991 |
| Luxembourg | 23.8 | 18.8 | 15.6 | 15.5 | 26.4 | 1993 |
| Nederland | 20.0 | 18.3 | 21.1 | 8.3 | 32.4 | 1994 |
| Österreich[1] | 27.2 | 17.3 | 7.4 | 12.6 | 35.5 | 1994 |
| Portugal | 39.7 | 18.8 | 7.4 | 5.5 | 28.6 | 1993 |
| Suomi/Finland | 24.3 | 13.4 | 10.2 | 13.1 | 39.1 | 1993 |
| Sverige | 23.1 | 15.8 | 18.2 | 12.4 | 30.6 | 1993 |
| United Kingdom | 36.7 | 8.6 | 15.7 | 24.6 | 14.4 | 1992 |
| TOTAL EUR 15 | 30.8 | 18.5 | 13.4 | 10.2 | 27.1 | |
| Island[3, 4] | 30.7 | 19.0 | 9.1 | : | 41.2 | 1992 |
| Norge[1] | 29.2 | 16.3 | 8.3 | 12.1 | 34.1 | 1993 |
| EEA | 30.8 | 18.5 | 13.3 | 10.2 | 27.2 | |

[1] Data on local units.
[2] Food, beverages, tobacco: including cafés where more than 50% of alcoholic drinks are consumed on the premises.
[3] Data for retail outlets.
[4] Excluding motor vehicle distribution.
Source: Eurostat.

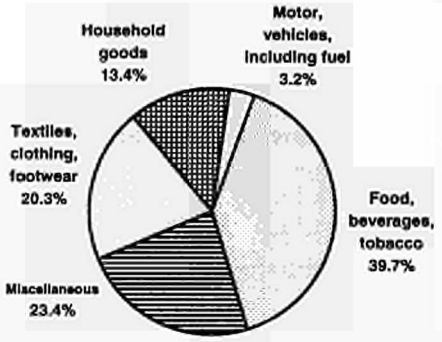
**Figure 22 - Breakdown of retail enterprises by sector of main activity (%) in the EEA (1988-1994)**



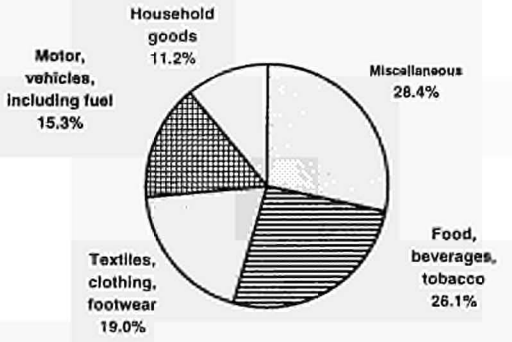
## Deutschland (1992)



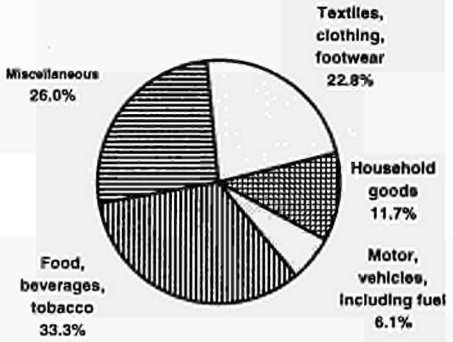

## España (1988)



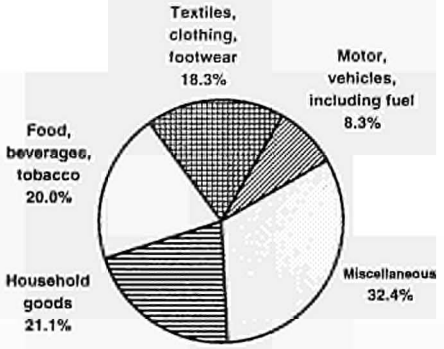

## France (1992)



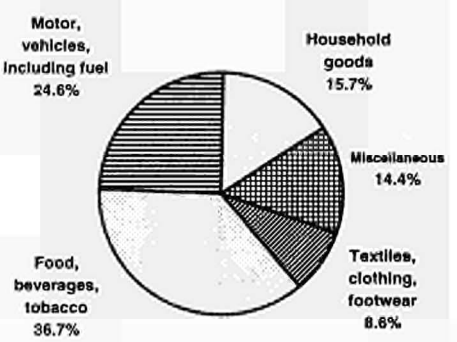

## Italia (1991)




## Nederland (1994)




## United-Kingdom (1992))



## 3.4. Retail outlets in the European Economic Area

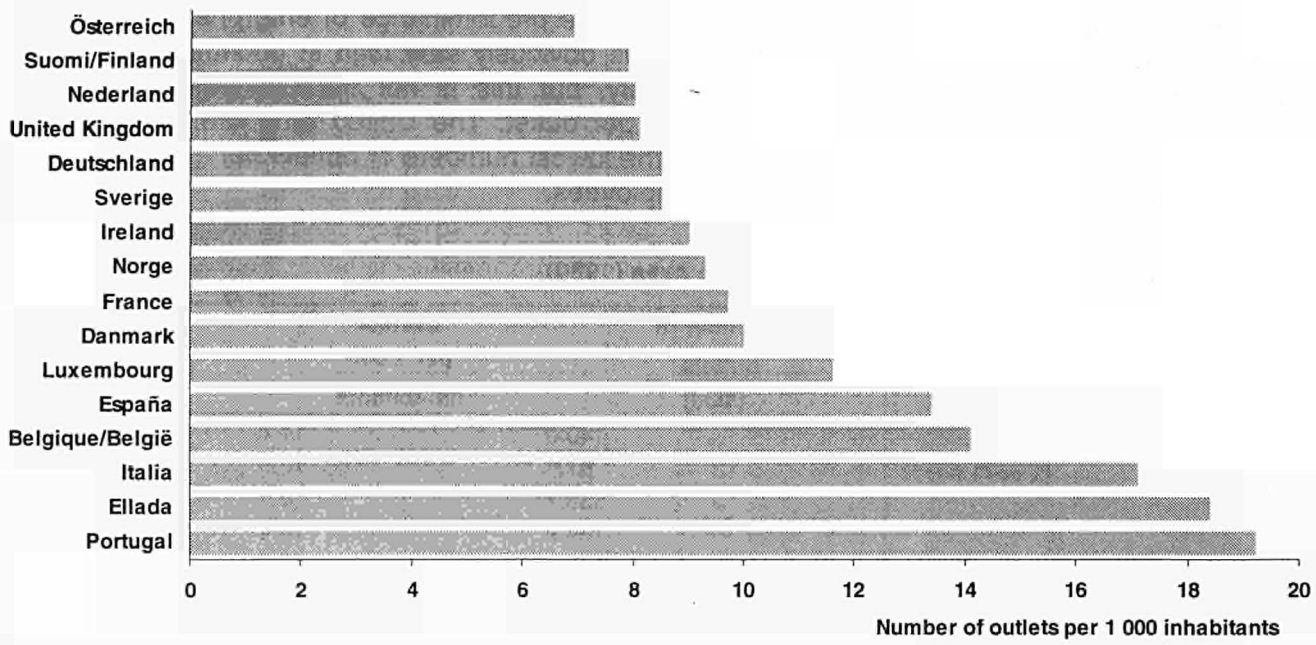
The number of retail outlets in the countries of the European Union is estimated at almost four million. They are situated primarily in Italy, France, Germany, Spain and the United Kingdom. The ratio of the number of outlets to enterprises is 1.15, a measure of the predominance of enterprises with only one outlet. The number of outlets per 1 000 inhabitants is obviously very high in countries with a strong tourism industry such as Portugal, Greece and Italy, but this is not the only relevant factor, as demonstrated by the number of persons employed per outlet. The United Kingdom has the highest number of persons employed per outlet and one of the lowest numbers of outlets per 1 000 inhabitants. Greece and Italy have the outlets with the fewest employees.

**Table 12: Retail outlets in the European Economic Area (1990)**

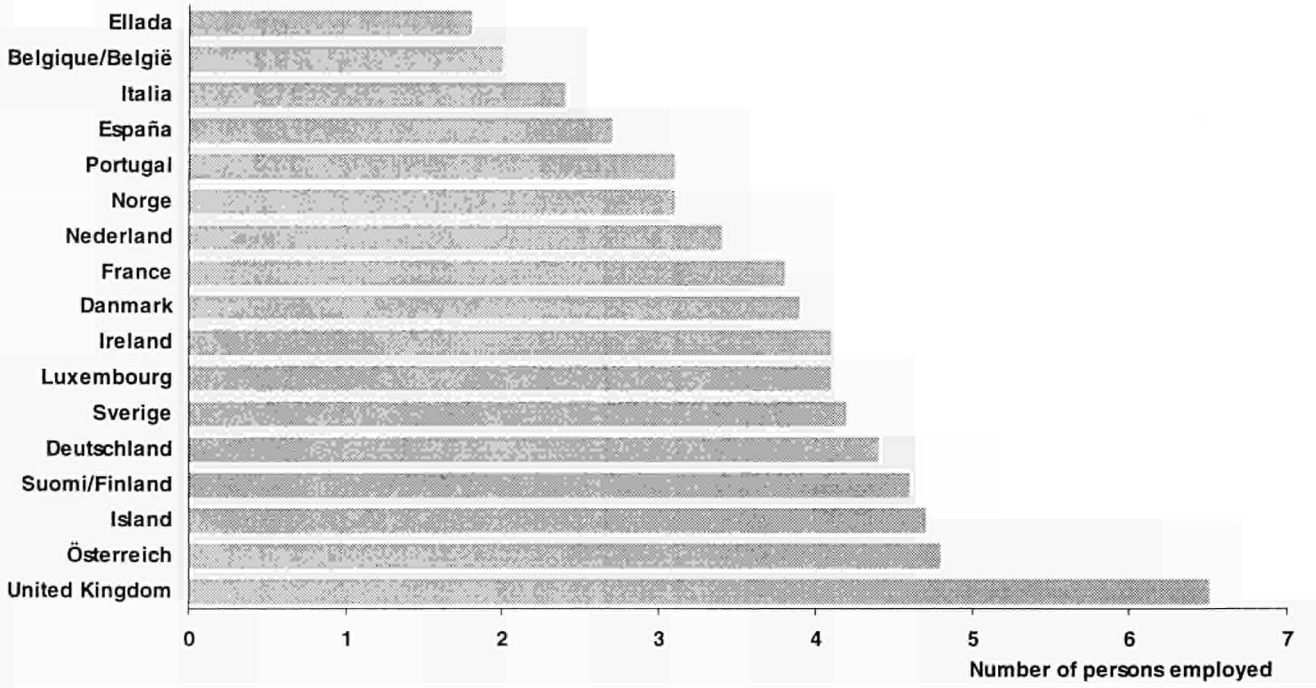
| | Number of outlets[1] ('000) | Outlets per 1 000 inhabitants | Employees per outlet |
|---|---|---|---|
| Belgique/België[2] | 140.0 | 14.1 | 2.0 |
| Danmark | 51.5 | 10.0 | 3.9 |
| Deutschland[3] | 533.7 | 8.5 | 4.4 |
| Ellada[2] | 184.9 | 18.4 | 1.8 |
| España | 523.2 | 13.4 | 2.7 |
| France | 546.1 | 9.7 | 3.8 |
| Ireland | 31.7 | 9.0 | 4.1 |
| Italia | 983.0 | 17.1 | 2.4 |
| Luxembourg | 4.4 | 11.6 | 4.1 |
| Nederland | 119.4 | 8.0 | 3.4 |
| Österreich | 52.5 | 6.9 | 4.8 |
| Portugal[2] | 190.0 | 19.2 | 3.1 |
| Suomi/Finland | 39.7 | 7.9 | 4.6 |
| Sverige | 72.2 | 8.5 | 4.2 |
| United Kingdom[2] | 466.6 | 8.1 | 6.5 |
| TOTAL EUR 15 | 3 939.0 | 11.3 | 3.5 |
| Island | 1.7 | 6.7 | 4.7 |
| Norge | 39.5 | 9.3 | 3.1 |
| EEA | 3 980.2 | 11.2 | 3.6 |
| United States | 1 929.3 | 8.3 | 6.6 |
| Japan | 1 619.8 | 13.3 | 4.2 |

[1] Data for 1986-1990.
[2] Eurostat estimate.
[3] West Germany.
Source: Eurostat.

## Figure 23 - Density of retail outlets (1990)




## Figure 24 - Number of persons employed per retail outlet (1990)



## 3.5. Turnover in retail distribution

At the beginning of the 1990s total turnover in retail distribution in the fifteen countries of the European Union was about ECU 1 600 billion. By comparison, it should be borne in mind that the gross domestic product, which is the sum of the final uses of goods and services, was estimated at 5 400 billion in 1992. Four countries - Germany, the United Kingdom, France and Italy - accounted for 74% of this total. The average turnover per enterprise (ECU 471 000) and per person employed (ECU 110 000) varies greatly between countries. These disparities are a clear reflection of the very great diversity of European countries.

**Table 13: Characteristics of turnover in retail distribution**

| | Turnover | Average turnover (ECU 1 000): | | |
|---|---|---|---|---|
| | Total (ECU billion) | per enterprise | per person employed | Year [1] |
| Belgique/België | 51.4 | 402 | 187 | 1990 |
| Danmark | 24.8 | 522 | 125 | 1992 |
| Deutschland | 430.3 | 859 | 131 | 1992 |
| Ellada[2] | 20.0 | 114 | 59 | 1990 |
| España[3] | 119.8 | 234 | 86 | 1992 |
| France | 260.0 | 563 | 124 | 1990 |
| Ireland | 12.2 | 415 | 92 | 1991 |
| Italia | 230.0 | 259 | 96 | 1990 |
| Luxembourg | 3.8 | 1 106 | 193 | 1993 |
| Nederland | 69.3 | 693 | 113 | 1992 |
| Österreich | 38.1 | 951 | 131 | 1994 |
| Portugal | 26.5 | 200 | 73 | 1993 |
| Suomi/Finland | 17.6 | 622 | 151 | 1993 |
| Sverige | 39.6 | 645 | 138 | 1993 |
| United Kingdom[4] | 283.2 | 813 | 93 | 1992 |
| TOTAL EUR 15 | 1 626.5 | 471 | 110 | |
| Island | 1.1 | 645 | 135 | 1992 |
| Norge | 24.0 | 628 | 195 | 1993 |
| EEA | 1 651.6 | 473 | 111 | |

[1] Reference year for turnover. May differ for enterprises and persons employed.
[2] Eurostat estimate.
[3] Excluding enterprises in motor vehicle distribution.
[4] Turnover including VAT.
Source: Eurostat.

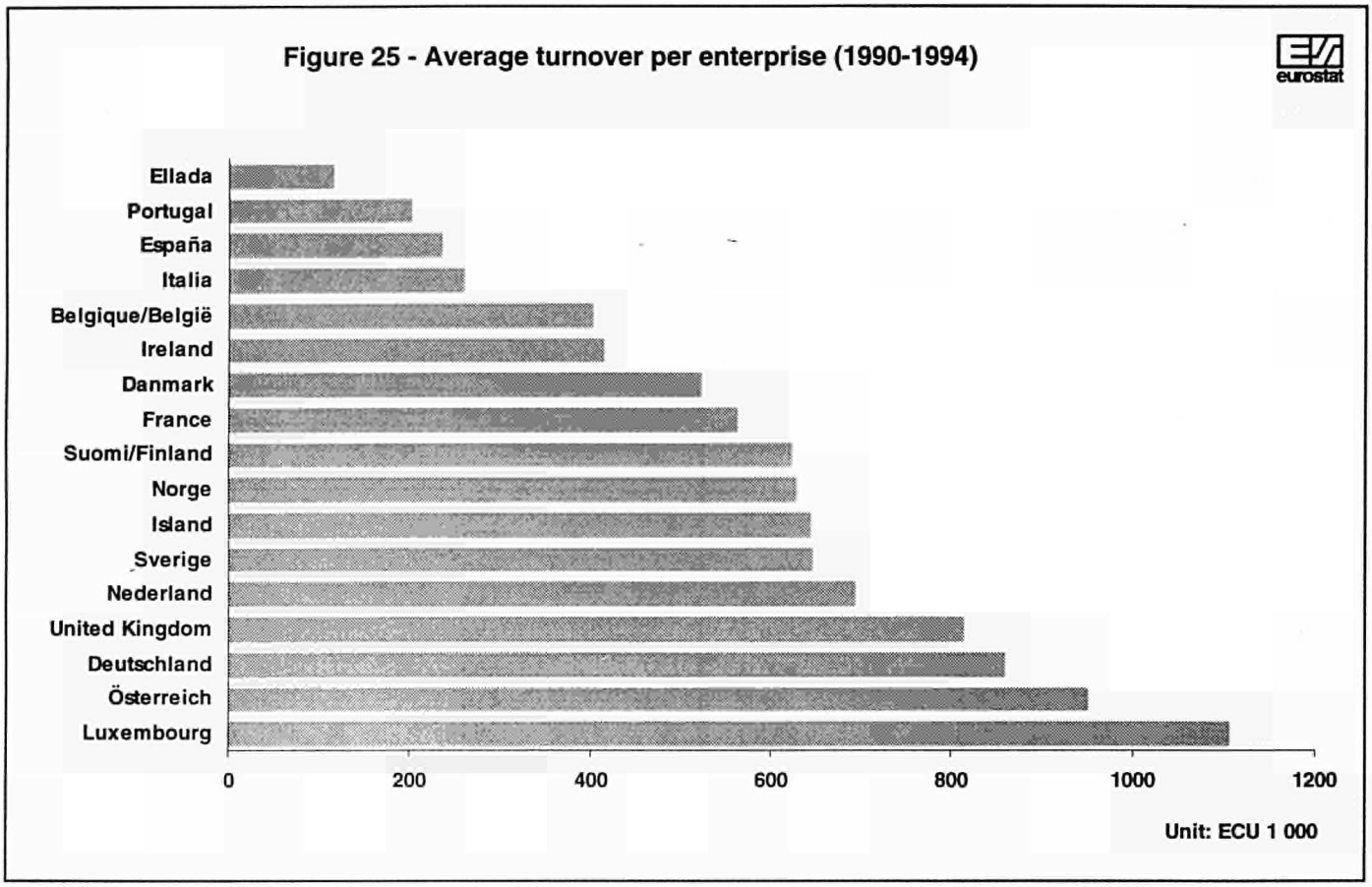


Figure 25 - Average turnover per enterprise (1990-1994)
eurostat
Ellada
Portugal
España
Italia
Belgique/België
Ireland
Danmark
France
Suomi/Finland
Norge
Island
Sverige
Nederland
United Kingdom
Deutschland
Österreich
Luxembourg
0
200
400
600
800
1000
1200
Unit: ECU 1 000

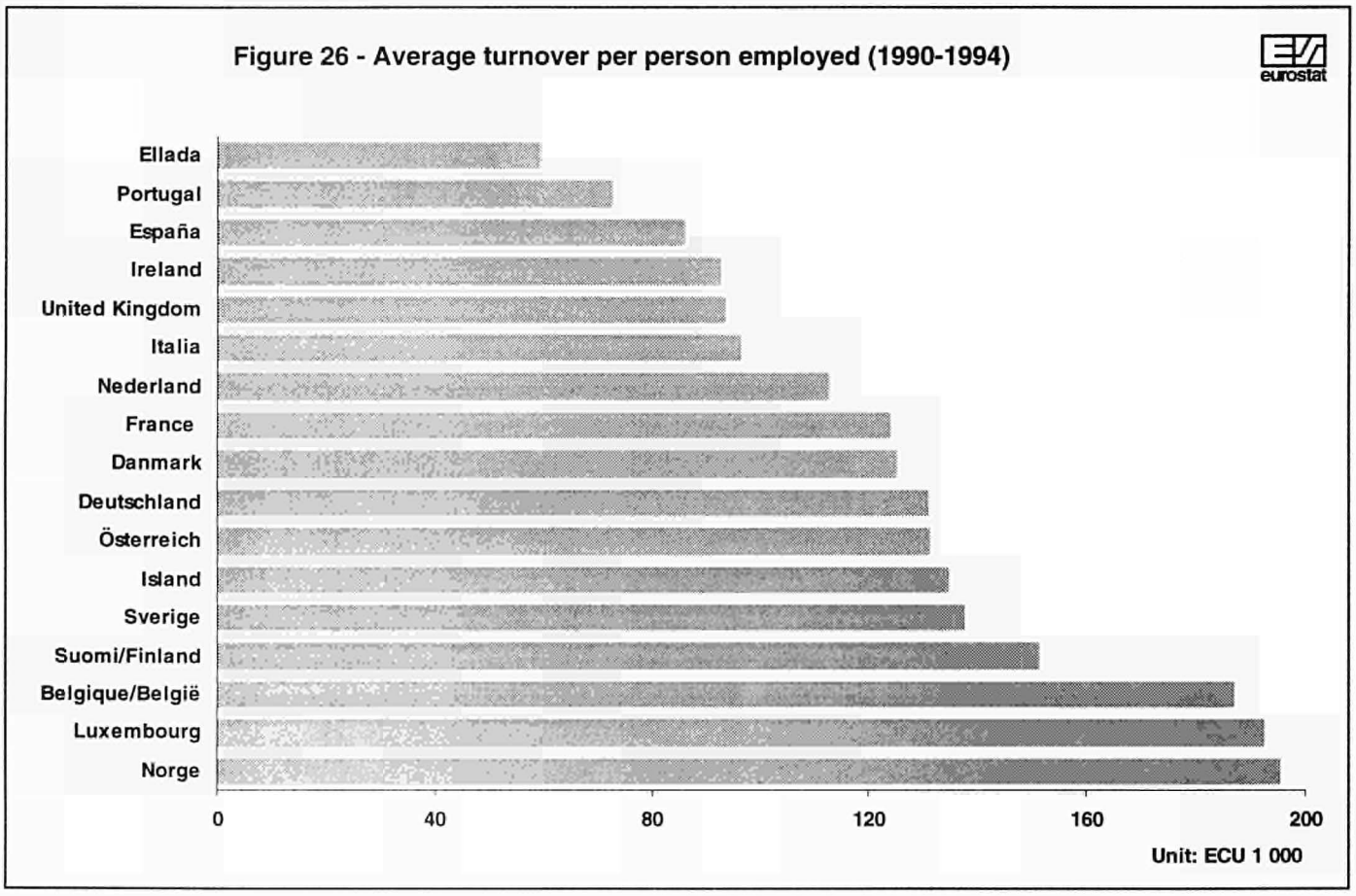


Figure 26 - Average turnover per person employed (1990-1994)
eurostat
Ellada
Portugal
España
Ireland
United Kingdom
Italia
Nederland
France
Danmark
Deutschland
Österreich
Island
Sverige
Suomi/Finland
Belgique/België
Luxembourg
Norge
0
40
80
120
160
200
Unit: ECU 1 000

## 3.6. International turnover of the main European retailing groups

During the past ten years, wholesale and retail distribution enterprises have stepped up initiatives aimed at internationalization. In the case of food distribution, initiatives to expand internationally have been taken mainly by the following countries: France, Germany, the United Kingdom, Belgium and the Netherlands. Among the sales formats most frequently adopted outside national frontiers have been the hypermarket (by French corporations) and the discount store (by German companies).

**Table 14: International turnover of European retailers (1990-1991)**

| Corporation | Country | Main activity | International turnover | |
|---|---|---|---|---|
| | | | Amount (ECU million) | % of total turnover of the group |
| Tengelmann | Deutschland | Food | 12 656.4 | 55.7 |
| Metro | Deutschland | Food, non-food, inter-industry, C&C | 6 036.1 | 35.0 |
| Promodes | France | Food | 5 506.2 | 34.4 |
| Delhaize the Lion | Belgique/België | Food | 5 283.0 | 72.4 |
| Ahold | Nederlands | Food | 4 548.3 | 50.6 |
| Otto Versand | Deutschland | Mail order | 3 602.2 | 45.9 |
| Carrefour | France | Food | 3 414.7 | 31.1 |
| Vendex International | Nederlands | Non-food, inter-industry | 2 808.7 | 35.3 |
| Aldi | Deutschland | Food | 2 520.0 | 20.0 |
| Ikea | Sverige | Furniture | 2 138.2 | 76.2 |
| Auchan | France | Food | 1 413.2 | 15.3 |
| J. Sainsbury | United Kingdom | Food | 1 356.3 | 11.8 |
| Marks & Spencer | United Kingdom | Large chain stores, food, clothing | 1 055.5 | 12.7 |
| GUS | United Kingdom | Mail order | 1 013.6 | 26.9 |
| Au Printemps | France | Large chain stores | 986.0 | 20.2 |
| La Redoute | France | Mail order | 879.3 | 35.0 |
| Quelle | Deutschland | Mail order | 759.9 | 10.6 |
| Dixons | United Kingdom | Electrical goods | 726.2 | 30.6 |
| Docks of France | France | Food | 508.4 | 13.3 |
| Casino | France | Food | 449.3 | 6.1 |
| Ratners | United Kingdom | Jewellery and related articles | 348.2 | 27.6 |

Sources : Eurostat, Institute for Retail Studies (IRS), University of Stirling.

## 3.7. Sales formats in the food sector

During the past thirty years the general food sector has experienced a rapid development of new sales structures (discount stores, supermarkets and hypermarkets). These new formats, which are not always initiated by large enterprises, have substantially reduced the proportion of traditional sales formats. Table 15 shows that in Germany, Spain and the United Kingdom they account for 75% or more of food distribution.

**Table 15: Market share of sales formats in the food sector (%) (1994)**

| | Deutschland[1] | France[1] | Italia[1] | España[2] | United Kingdom[2] |
|---|---|---|---|---|---|
| "Discount" store | 27.6 | 4.0 | 5.7 | 9.0 | 9.0 |
| Supermarket | 29.7 | 24.6 | 27.2 | 36.5 | 66.0 |
| Hypermarket (superstores in the United Kingdom) | 24.3 | 30.5 | 11.4 | 30.5 | |
| Sub-total | 81.6 | 59.1 | 44.3 | 76.0 | 75.0 |
| Others (mini-markets, traditional stores, convenience stores) | 18.4 | 40.9 | 55.7 | 24.0 | 25.0 |
| Total | 100.0 | 100.0 | 100.0 | 100.0 | 100.0 |

[1] of total food distribution.
[2] of grocery distribution.

Source: EHI, INSEE, S&P, NIELSEN, IGD.

## 3.8. Main European retailing groups

The market presence of the major European retailing groups, which operate mainly in the food sector, is also an indication that concentration has advanced more rapidly in northern Europe. Within the leading European retailing groups, the first sixteen, ranked according to turnover, are German, French and British. The other groups come from the Netherlands, Belgium, Sweden and Switzerland. There is just one Spanish group in the top twenty-five. Some of these groups have speeded up growth by acquiring corporations engaged in other forms of retail distribution. One name, originally active in the wholesale and cash-and-carry market, has substantially increased the retailing share of its total sales by purchasing large chain stores and acquiring holdings in food distribution. Large mail order companies have been acquired by large chain store operators for the same reason.

**Table 16: Main retailing groups**

| Group | Country | Main activity | Turnover 1991-1992 (ECU billion) |
|---|---|---|---|
| Tengelmann | Deutschland | Food | 22.8 |
| Metro[1] | Deutschland | Food, non-food, inter-industry cash-and-carry | 22.6 |
| Rewe | Deutschland | Food | 18.5 |
| Carrefour [2] | France | Food | 16.2 |
| Intermarche | France | Food | 15.4 |
| Leclerc | France | Food | 15.3 |
| Albrecht (Aldi) | Deutschland | Food | 13.4 |
| Edeka | Deutschland | Food | 13.2 |
| J. Sainsbury | United Kingdom | Food | 13.1 |
| Promodes | France | Food | 11.0 |
| Tesco | United Kingdom | Food | 10.8 |
| Pinault-Printemps | France | Large chain stores | 10.7 |
| Otto Versand | Deutschland | Mail order | 10.2 |
| Spar | Deutschland | Food | 10.1 |
| Casino-Rallye | France | Food | 10.0 |
| Asko [3] | Deutschland | Food | 9.9 |
| Ahold | Nederlands | Food | 9.8 |
| Karstadt [4] | Deutschland | Large chain stores, mail order | 9.3 |
| Marks & Spencer | United Kingdom | Large chain stores, food, clothing | 8.6 |
| Schickedanz [5] | Deutschland | Mail order, food | 8.4 |
| ICA | Sverige | Food | 7.5 |
| Delhaize le Lion | Belgique/België | Food | 7.3 |
| El Corte Ingles | España | Large chain stores, food | 7.1 |
| Argyll | United Kingdom | Food | 7.0 |
| Vendex International | Nederlands | Non-food, inter-industry | 7.0 |

[1] Owns Kaufhof and holdings in Asko.
[2] Owns Euromarché.
[3] Owns Coop AG.
[4] Owns Neckermann.
[5] Owns Quelle.
Sources : Eurostat; Institute of Retail Studies (IRS), Sterling University.

## 3.9. European buying and distribution groups

These groups are composed of enterprises or national purchasing centres, which are often the outcome of alliances between small and medium-sized enterprises active at regional level. The aim of their members is mainly to acquire competitive advantages on national markets by jointly managing part of their purchasing and marketing. Thus they arrange for products to be bought by one of their members present in the countries where conditions are best in terms of price or quality. They help to standardize purchase prices and product ranges at European level.

**Table 17: Main European buying and distribution groups (1993)**

| Group | Member companies | Creation date | Base | Turnover 1991 (ECU billion) |
|---|---|---|---|---|
| **EMD** (European Marketing Distribution AG) | Markant (D)<br>NISA Today's (UK)<br>Selex (E,I)<br>Zev-Markant (A)<br>Superkob (DK)<br>Musgrave (IRL)<br>Uniarme (P) | 1988 | Switzerland | 63.3 |
| **Deuro/MIAG** (Deuro Buying AG/Metro International AG) | Metro (D,F,I,A,DK)<br>Carrefour (F,E,P)<br>Makro (NL) | 1990 | Switzerland | 52.2 |
| **AMS** (Associated Marketing Services) | ICA (S)<br>Kesko (SF)<br>Allkauf (D)<br>Rinascente (I)<br>Hakon (N)<br>Mercadona (E)<br>JMR (P)<br>Superquinn (IRL) | 1990 | Switzerland | 46.8 |
| **ERA** (European Retail Alliance) | Ahold (NL)<br>Argyll (UK)<br>Casino (F) | 1989 | Luxembourg | 21.9 |
| **Eurogroup** | Rewe (D)<br>Coop (CH)<br>Paridoc (F)<br>GIB Group (B)<br>Vendex Food (NL) | 1988 | Germany | 43.0 |
| **CEM** (Coopération Européenne de Marketing) | Edeka (D, DK)<br>CRAI (I)<br>Conad (I)<br>Booker (UK)<br>UDA (E) | 1989 | Belgium | 41.6 |
| **NAF** (Nordisk Andelsforbund) | KF-group (S)<br>Coop (DK, I)<br>SOK (SF)<br>EKA (SF)<br>NKL (N)<br>CWS (UK) | 1918 | Denmark | 36.9 |
| **BIGS** (BIGS Buying International Group SPAR) | Spar (D,UK,A)<br>Axel Dagab (S)<br>Unil (N)<br>TukoSpar (SF)<br>Despar (I)<br>Unigro (NL)<br>Dagrofa (DK)<br>Unigrobel (B)<br>BWG (IRL)<br>Bernag Ovag (CH)<br>Hellaspar (GR) | 1990 | Netherlands | 31.5 |

Sources : Eurostat; Cescom - Bocconi University, Milan.

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