WHOLESALE TRADE IN THE EUROPEAN ECONOMIC AREA 1997

EUROPEAN COMMISSION
STATISTICAL OFFICE OF
THE EUROPEAN COMMUNITIES
DG XXIII

eurostat

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Spain
Instituto Nacional de Estadística (INE)

France
Institut National de la Statistique et des Etudes Economiques (INSEE)

Ireland
Central Statistics Office

Italy
Istituto Nazionale di Statistica (ISTAT)

Luxembourg
Service Central de la Statistique et des Etudes Economiques (Statec)

Netherlands
Centraal Bureau voor de Statistiek

Austria
Austrian Central Statistical Office

Finland
Statistic Finland

Sweden
Statistics Sweden

United Kingdom
Office for National Statistics

Iceland
National Economic Institute

Norway
Statistics Norway

Switzerland
Bundesamt für Statistik

A great deal of additional information on the European Union is available on the Internet.
It can be accessed through the Europa server (http://europa.eu.int).

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Foreword

This publication presents the first statistical study of wholesale trade over the European Economic Area. It completes the panorama of the structure and evolution of the distributive trades which was started with a series of publications on retailing. The publication is the result of work carried out jointly by Eurostat and Directorate General XXIII.

The wholesale sector, including intermediaries, is composed of 1.1 million enterprises which account for over 4% of gross domestic product in Europe with 6.6 million people employed in the trade. Wholesale trade has a crucial role at both national and international levels. It provides an essential channel for the flow of products between agriculture and other basic industries and manufacturing; and also for the movement of manufactured goods to retailers, other manufacturers and service enterprises. A successful wholesale sector contributes to the efficiency of the economy and plays a major part in bringing a wide choice of goods to the consumer. In addition, the wholesale trade is heavily involved in both import and export activity.

This publication has been made possible by the full and helpful cooperation of the National Statistical Institutes of the European Economic Area for which the compilers of the report are grateful. It draws on all the data that were available to them on wholesaling in the period before the implementation of the Council Regulation on structural business statistics (EC-Euratom n° 58/97 of 20 December 1996). While this means that there is inevitably some lack of harmonisation in the data presented, the publication provides the best source available at the moment for comparing the wholesale trade sectors of individual countries and measuring it for the EEA as a whole. The new Regulation is of course leading to an improved set of data on wholesale trade as for other major sectors of the economy.

The publication represents a further step by Eurostat and DG XXIII in their continuing aim to assemble the best information available on the European market and to disseminate it to economic operators and to all other users of statistics. We hope that this publication meets these purposes and will satisfy the requirements of users.

Yves FRANCHET
Director-General
Eurostat

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Director-General
DG XXIII

GENERAL REMARKS

This first publication on wholesaling is intended to complement the series of publications on retailing. That series started with 'Retailing in the European Single Market 1993' and its supplement 'Retailing in the European Economic Area' published in 1994. These were followed by 1996 and now 1997 versions on 'Retailing in the European Economic Area'.

The use of information from multi-annual surveys or censures means that detailed data in the various country chapters are provided for a fairly wide range of years. This range also reflects the time-span of the project which, for various reasons, was somewhat greater than usual.

Data in some of the country chapters have been originally compiled on the basis of national classifications which are not entirely consistent with NACE Rev. 1. In some cases, the presentation of this information has been amended to approximate to the categories of this classification. There is inevitably, therefore, some lach of comparability between the data for different countries.

The terms 'distributive trade' and 'commerce' are used synonymously in the texts to cover wholesaling, commission agents and retailing. Similiraly, the terms 'commission traders', 'intermediaries' and 'commercial agents' generally have the same broad meaning - and equate to enterprises classified to group 51.1 of NACE Rev. 1. The treatment of the motor trades varies from country to country in the aggregates.

Tables in the introductory over-view chapter are not drawn from the material in the country chapters. This is to permit greater comparability in the years used and to ensure the presentation of a more complete range of data.

The term 'billion' signifies 1 000 million throughout the publication.

Components in a table may not add precisely to the totals given because of rounding of the last digit shown. The policy adopted in the publication has been to accept such differences.

ECU exchange rates (1988-96)

Country	Currency Code	1988	1989	1990	1991	1992	1993	1994	1995	1996
Belgique/België	BEF	43.43	43.38	42.43	42.22	41.59	40.47	39.66	38.55	39.30
Danmark	DKK	7.95	8.05	7.86	7.91	7.81	7.59	7.54	7.33	7.36
Deutschland	DEM	2.07	2.07	2.05	2.05	2.02	1.94	1.92	1.87	1.91
Elláda	GRD	167.58	178.84	201.41	225.22	247.03	268.57	288.03	302.99	305.55
España	ESP	137.60	130.41	129.41	128.47	132.53	149.12	158.92	163.00	160.75
France	FRF	7.04	7.02	6.91	6.97	6.85	6.63	6.58	6.53	6.49
Ireland	IEP	0.78	0.78	0.77	0.77	0.76	0.80	0.79	0.82	0.79
Italia	ITL	1 537.33	1 510.47	1 521.98	1 533.24	1 595.52	1 841.23	1 915.06	2 130.14	1 958.96
Luxembourg	LUF	43.43	43.38	42.43	42.22	41.59	40.47	39.66	38.55	39.30
Nederland	NLG	2.33	2.34	2.31	2.31	2.27	2.18	2.16	2.10	2.14
Österreich	ATS	14.59	14.57	14.44	14.43	14.22	13.62	13.54	13.18	13.43
Portugal	PTE	170.06	173.41	181.11	178.61	174.71	188.37	196.90	196.11	195.76
Suomi/Finland	FIM	4.94	4.72	4.85	5.00	5.81	6.70	6.19	5.71	5.83
Sverige	SEK	7.24	7.10	7.52	7.48	7.53	9.12	9.16	9.33	8.51
United Kingdom	GBP	0.66	0.67	0.71	0.70	0.74	0.78	0.78	0.83	0.81
Iceland	ISK	:	:	74.39	73.26	74.66	79.25	83.11	84.69	84.66
Norway	NOK	7.70	7.60	7.95	8.02	8.04	8.31	8.37	8.29	8.20
Switzerland	CH	1.73	1.80	1.76	1.77	1.82	1.73	1.62	1.55	1.57

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The European wholesaling trade: structure, strategies and perspectives

1. Definitions and types of wholesalers

The wholesale trade is an essential sector in economic life. It plays an important intermediary role in the movement of goods from production to demand. It thus facilitates the adjustment of the supply and demand for products in quantitative and qualitative terms, as well as in terms of time, space and finance.

By stocking large quantities of merchandise and by the timely execution of orders, the wholesaler contributes to the smoothing of production. By paying for orders, wholesaler constantly feeds the financial flow of producers.

At the same time, the wholesaler allows all the buyers to obtain products independently of the place and time of production. Retailing also fulfils this function, but to a more limited extent as its stock rotation is more rapid.

The function of purchase and selection of assortments (that is, the range of goods) is an equally important function of wholesaling because it encourages specialisation of production and thus the reduction of manufacturing costs. Through using wholesalers, and thus focusing on purchases and sales, producers and distributors can speed up and simplify administrative management.

Wholesalers are a link between retailers and producers and allow the latter, above all small and medium-sized enterprises, to have specialised brand knowledge for their products. They also play a particularly important role as regards retailers because they supply information to them about the products and brands available on the market, and they assist retailers in building up their assortment.

The structure of wholesaling enterprises is varied, and the sector includes at least three categories: domestic or foreign subsidiaries of industrial enterprises, independent wholesalers and intermediaries, agents, brokers, and others working on commission.

1.1. Wholesaling subsidiaries of manufacturing

The activity of wholesaling distribution can be carried out through sales branches 'outlets' or through genuine subsidiaries, the difference between the two being the presence of stocks in the latter. It does not involve independent operators, because the wholesalers being discussed are answerable to manufacturers.

The 'manufacturers' / wholesalers are remunerated from the difference between the sale and purchase price, this being a conventional (transfer) price for the goods and services sold through a distribution channel belonging to an enterprise.

Sales branches and subsidiaries are frequently used in the following cases:

- when manufacturers have a high level of capital available;
- when manufacturers want to exercise tight control over the level of services provided and over prices
- when the product is technologically complex;
- when the clients are large and very concentrated;
- when the manufacturer's assortment is very wide or deep;
- when an enterprise does not want to be represented by an independent wholesaler that also sells competitors' products;
- when a manufacturer is seeking to establish electronic data interchange with a wholesaler that has not yet achieved this.

However, independent wholesalers can also present advantages in the relationship with subsidiaries because it is in their interest to develop sales in certain areas. They can also serve small clients in a more profitable way, and are more available to give their clients a range of services.

1.2. Independent wholesalers

Independent wholesalers buy and resell products; they form the most important category.

They are remunerated from the gross margin, which they add to the purchase price. They obtain reductions on the official manufacturer's price as a function of forecast reductions for all the operators in the distribution channel, functional reductions in exchange for certain services and others as a consequence of the quantities bought, or for promotional activities or speedy payment.

Independent wholesalers are particularly favoured when producers have limited capital, when control over service or price is not especially important, when they are familiar with the technical specifications of products, when clients are small and dispersed geographically, and when producers have a limited and less wide assortment.

A distinction is made between those independent wholesalers that offer an extended range of services and those with a limited range.

1.2.1. Wholesalers offering a large range of services

These services generally include the following: credit, product warehousing, delivery, assistance with merchandising and promotion, and marketing research.

There are at least five categories of this type of wholesaler: generalists, specialists, 'rack-jobbers', wholesaling associations or franchisees, and co-operative wholesalers.

The first of these usually take as much of a client's assortment as needed, and they can also later divide according to product categories (food and non-food) or according to client type ('business-to-business').

The second category are usually specialists in a limited range of products and they offer an extensive assortment within this range. They often have greater specialised know-how than the generalists, particularly in the handling of industrial products.

'Rack-jobbers' deliver products to large-area, self-service sales outlets. They retain ownership of goods until sale by retailers, and they undertake the management of stocks, establish product prices, and supply and re-supply lines according to client needs.

In the voluntary chains wholesalers are linked to independent retailers that have a common commercial strategy. They handle one or more 'fascias' or trade names with common methods of communication, and have common distribution brands and often use the same type of shops.

Wholesalers belonging to retail co-operatives meet the particular needs of the latter and they share the profits (or losses) of each outlet. These wholesalers often help retailers to achieve their location, marketing, merchandising, cost control and computer strategies.

1.2.2. Wholesalers offering only a limited range of services

'Cash and carry' wholesalers belong to this category, as do the wholesalers involved in distance selling.

The former do not offer credit and do not deliver to the final customer because they provide open access. Their clients are principally made up of small and medium-sized retail or catering enterprises or car repairers or components sellers that need accessories quickly. The clients have to go to the stores, transporting the merchandise themselves and paying cash. The wholesaler only provides promotional assistance or marketing research.

The wholesalers that sell through correspondence use a catalogue for communication with customers, and for convassing business and launching promotions. They can have a clientele made up of small enterprises, particularly in rural or geographically dispersed areas.

1.3. Intermediaries

Unlike the above categories, intermediaries do not acquire ownership of goods, and are remunerated through sales commissions which are usually paid by the manufacturers. They concern themselves with customer contacts and with negotiations.

A distinction is made between agents and representatives, the former being employed for unspecified periods, while the latter work to specific instructions (on given contracts or negotiations).

Agents work for a number of non-competing manufacturers. They generally have an exclusive territory for each manufacturer and a limited range of products. A manufacturer can thus use many agents, providing each one of them has an exclusive territory and a specific range of products.

The enterprises which most frequently use this category of intermediary are the following:

- enterprises that are too small to have a sufficient sales network;
- small enterprises that are only superficially represented in certain regions;
- large enterprises that have very fragmented markets;
- large enterprises whose sales force cannot cover certain large regions.

Representatives are an important channel of distribution in sectors such as fuels, agricultural products and industrial equipment. There are also representatives who specialise in international trade.

2. General aspects of wholesaling in the European Economic Area

2.1. Importance of the sector

Its economic weight is high in terms of the number of enterprises, value added, persons employed and turnover.

The distributive trade includes a very considerable number of enterprises in all the European countries. More than 4.5 million enterprises, about 30% of all European enterprises belong to this sector (see Table 1). Three-quarters of these enterprises are specialised in retail trade and the remaining quarter are wholesalers or intermediaries.

The relation between the two sectors varies from one country to another: the percentage of retail enterprises is higher in countries where distribution is more fragmented and where there are a higher number of enterprises and sales points (Greece, Spain and Portugal). For every wholesaler, there are five or six retailers. Conversely, in countries where trade is more modern or plays a role in the international distribution of products (Switzerland, Austria, the Netherlands), the ratio is one wholesaler per two retailers. In terms of enterprise density (the number of enterprises per 10 000 inhabitants), Denmark, Belgium, Iceland, Luxembourg, Norway and Sweden have a higher density than other countries, while Ireland, France, Germany, Spain and Austria have a below average density (see Table 2).

The countries with the highst enterprise density are not those with a less modern retail distribution system. On the contrary, density is higher in countries with a wholesale enterprise structure more geared to industrial goods than consumer goods. Countries with a low population have the highest number of enterprises per 10 000 inhabitants. These enterprises are often transhipment and storage places for products which are the objects of international trade.

2.2. The distribution of enterprises by activity

The distribution of enterprises by activity, according to NACE Rev. 1 (see Table 3), allows the following considerations to be seen.

The wholesaling of agricultural products and live-stock (cereals, flowers and plants, animals, un-manufactured tobacco) includes a limited percentage, nearly always the lowest, of the total number of enterprises - this is the result, among other things, of integration among food wholesalers and large-scale distribution.

In Austria, Belgium, France, Italy and the Netherlands, the percentage of enterprises in this category is higher than the European average, while in the United Kingdom and Sweden it is lower - the difference reflects the different role of agriculture in these countries.

Food, drink, and tobacco wholesaling has a greater percentage of enterprises, but lower than for non-food wholesaling - in large part this is the result of the more powerful integration of the wholesaling function by the large food distributors. In Spain, Italy, Ireland and Portugal the percentage of the enterprises in the sector is higher than the European average, while it is much lower in Austria, Finland and Sweden. These differences are explained by the different levels of modernisation of food distribution in these countries.

The phenomenon of integration has not yet shown itself to the same degree in wholesaling of non-food consumer goods, where enterprises have been better able to defend themselves - their proportions are consequently much higher. This is particularly so in Belgium, the Netherlands and Germany, as well as Italy and Sweden.

In Sweden, but also in Germany, Finland and Norway the proportion of enterprises is higher than the European average in the wholesaling of non-agricultural intermediate products. The sector of machinery, equipment and supplies includes a very high proportion of enterprises in Norway, Finland, Luxembourg and France.

On the basis of these data, it is possible to define the main structural differences of wholesaling in Europe.

- Spain, Ireland and Portugal have a particularly important wholesaling trade for food products. The distribution of food goods is considerable but fragmented, and the wholesaler role is still fundamental.
- Belgium and Italy also have an important food wholesaling sector, but the non-food sector is equally important in these countries, while as the agricultural part is also well developed. This structure reflects a system of consumer goods distribution that is still largely traditional, and in which central purchasing remains very important.
- France and Austria have an important agri-foods sector, with a considerable agriculture production,

but with a relatively high number of enterprises in the machinery, equipment and supplies sectors. A strong presence in agricultural raw materials and machinery, equipment and supplies is equally the case in the United Kingdom and the Netherlands. In the latter countries, the system of distribution of consumer goods is more modern, and inter-industrial wholesaling plays a relatively more important role (see Table 15).

- Germany and the Netherlands have very developed non-food sectors, for both household products and intermediate products. This sector structure reflects the strength of industry in these countries, but also the role of wholesalers in the modernisation of non-food distribution, where voluntary groups and purchasing groups are very developed.

  For examples of enterprises in this sector see Tables 16, 17, 18 and 19, where the dominant role of German enterprises can be clearly seen.

- Finland, Luxembourg and Sweden have wholesaling systems characterised by the concentration of turnover in non-agricultural intermediate products, and machinery, equipment and supplies.

This structure reflects modern distribution systems and economies largely based on an industrial structure dispersed over the whole territory (for reasons of geography in Finland and Sweden), which makes it necessary for wholesalers to supply certain essential services.

For examples of enterprises in the intermediate non-agricultural product and machinery, equipment and supplies sectors see Table 20.

2.3. Employment

Within the EEA, over 20 million persons employed belong to trade. About two thirds of these are employed in retailing, and the remaining third in wholesaling. This relation differs from that of enterprises because the average size of enterprises is smaller in retail than in wholesaling. In the whole of the EEA just over 6.6 million persons work in the sector (see Table 4).

Employment varies a little from country to country and, in general, the numbers in retail are relatively lower in countries with a more modern trade structure.

The United Kingdom is the exception. This is partly explained by the very high concentration of the retail trade, even in the non-food sector, with the wholesaling function progressively integrated within large retail groups. Another part of the explanation is due to the inclusion of part-time workers iin the statistics. (Part-time employment is very important in this country).

The distribution of employees by activity (see Table 5) reflects the distribution of enterprises by activity, any differences being due to variations of size of the enterprises in terms of the persons employed.

The wholesalers dealing in agriculture and live-stock are smaller than the average, as are wholesalers dealing in non-food consumer goods, while food, beverages, and tobacco wholesalers, those dealing in intermediate non-agricultural products, and those dealing in machinery, equipment and supplies, are larger than the average (see Chart 1 and Table 6).

As a consequence, employment in wholesaling is concentrated in the latter sectors and the countries with a greater number of enterprises of this type, have a greater number of persons employed.

2.4. Turnover by sectors

The turnover of wholesaling in different countries depends on the number and size of enterprises. Germany, the United Kingdom and France thus occupy the first three positions while the enterprises of the Netherlands and Belgium have a turnover equal to half that of France. The Netherlands have two-thirds the number of enterprises of France. This is the result of the smaller size of enterprises in the Netherlands (see Table 7).

As far as distribution of turnover by sector is concerned, at the European level this depends on the distribution of the number and average size of enterprises in different sub-sectors.

The distribution of the number of enterprises by activity has shown the existence of different models of wholesaling. The relevance of these models is confirmed by the distribution of turnover by activity, with the following details:

- the Netherlands have a strong agri-food wholesaling sector, thanks to the size and productivity of enterprises in this sector. (Here, however the turnover of enterprises in sectors is biased slightly by the lack of information about the 'other wholesale trades sector', and is therefore is not completely comparable with that of other countries).

- Spain has an especially important non-food wholesaling sector, because of the fragmentation of distribution and retail in this sector.

- France seems to have better performance in food wholesaling than in machinery, equipment and supplies. It is therefore noticeable because of the strength of its agri-food sector.

- Sweden's non-food wholesaling, despite a high proportion of enterprises, does not have a particularly high relative turnover. Conversely, food wholesaling is strong.

On the basis of the distribution of enterprises and the turnover by sector, it is possible to define four models of national specialisation within European wholesaling.

- The 'agri-food' model in France and the Netherlands, where the grouping of the two sectors, of raw material and food products is most important. The two countries also have an important machinery, equipment and supplies sector: many enterprises are involved in this sector in France, but it is less efficient than in the Netherlands.

- The 'consumer products' model which characterises Italy, Spain, Ireland and Portugal, where wholesaling serving the distribution of consumer goods (food and non-food) is the most important sector.

- The 'non-food' model distinctive of Germany and Belgium, which excel in the wholesaling of non-food consumer products and non-agricultural intermediate products.

- The inter-industry model of countries like Denmark, Luxembourg, Austria, Finland, Sweden, Norway and Switzerland, where the enterprises in the wholesaling sectors linked to industry (intermediate products, machinery, equipment and supplies) are predominant.

2.5. Enterprise size and productivity

The countries with the highest average productivity in terms of turnover per person employed are Switzerland, Luxembourg, the United Kingdom and Austria, while Finland, Spain and Ireland occupy the lowest positions (see Table 8).

The difference between countries essentially depends on the average size of enterprises - and this in turn is linked to the modernisation of the sector - like the structure of the sub-sector.

At the European level, the most productive enterprises in terms of turnover per person employed most often belong to the sectors of agricultural raw materials and non-agricultural intermediate products.

France and Luxembourg have the best results in the first sector, Luxembourg, Switzerland and Austria in the second. Conversely, within Europe generally, the best results are to be found in the non-agricultural intermediate products sector and in the food and beverages sector (see Table 9).

Switzerland and Austria have a strong presence in these sectors with large enterprises, as do Germany, France and Luxembourg (see Table 15). The countries with an inter-industry model have a small presence in the food sector and the average size of enterprises in the intermediate products, machinery, equipment and supplies sectors is very reduced.

As a consequence, the most important large enterprises (in terms of turnover) are to be found in Switzerland, Austria, Ireland, Germany, France and Luxembourg, while those of smallest size are to be found in Sweden, Spain, Denmark, Norway and Finland.

The enterprises with the highest value added per person employed are almost the same countries as those with the highest turnover value per person employed. Denmark and France are exceptions - they have a ranking of average value added per person employed (compared to other countries) greater than that of turnover per person employed (see Table 10).

As far as value added per enterprise is concerned, countries have the same average results as for turnover per enterprise, again with the exception of France and Denmark, which would confirm the efficiency of their enterprises' use of the factors of production.

3. The evolution of the environment and the strategic trends of wholesalers

The economic and competitive environment of the wholesaling sector has witnessed important changes in recent years:

- enterprises making use of large-area stores have taken on an important place in retailing. As these often combine the traditional functions of retailing with wholesaling functions, they reduce the demand for enterprises in the sector.

- Producers themselves have shown a tendency to integrate the activities of wholesaling in some sectors, reducing the market share of wholesalers.

- New demand tendencies (proliferation and shortening of the product life-cycle, demand mobility), pose new management difficulties for wholesaling enterprises.

- The introduction of new information technologies has permitted a different approach to the management of supplier / client relationships, and this facilitates direct relations between manufacturers and retailers at the risk of excluding wholesalers.

- Structures and organisations have been changed because of the spread of new information technologies and market evolution.

- The internationalisation of the economy has progressed a great deal at all the levels of the different economic sectors: independent wholesalers risk being replaced by the international subsidiaries of large producers.

Wholesalers have reacted to these trends by increasing their productivity, by introducing innovations into their supply of services (logistics and consultancy), and by internationalising their activity. They have also reacted by involving themselves in retail sales through contractual agreements or by opening their own sales points.

New wholesaling formulae have also been developed, such as 'cash and carry' in the food area and 'rack-jobbing' in specialist sectors.

3.1. Vertical integration with wholesaling by large retailers

The specialisation and division of functions between manufacturers, wholesaling enterprises and retail, has a precise economic explanation: the specialist can produce the service at low cost thanks to its size and know-how.

The manufacturer's integration of the wholesaling function is thus rarely brought about for economic reasons, but is a response to competitive needs (control of the distribution channel). The costs borne by enterprises can be considered in the same way as marketing costs.

The origin of the crisis in the consumer goods wholesaling sector does not come from industry since the integration down stream by manufacturers is limited by the costs, which are much higher than in the case of recourse to specialists.

It is retailers above a certain size that are able to integrate wholesaling functions because their costs are often lower than those of specialists.

This is possible to the extent that large retail distribution does not concern itself with some of the traditional service elements of wholesaling (such as credit) and thus derives economies from integration.

Integration of the wholesaling function by large retailers is therefore a parallel phenomenon to the structural development of trade and it does not clash with any economic barrier. If the large chain stores integrate the function directly, small enterprises integrate through the establishment of purchasing groups where each member is obliged to make purchases from the central organisation.

The development of modern distribution and the concentration of the sector within Europe are undergoing profound changes with regard to logistics within industry and trade.

The end of the 1970s onwards witnessed, more in the United Kingdom than elsewhere in Europe, a phenomenon of concentration of logistic structures and a gradual movement whereby the control of the physical distribution of merchandise passed from producers to distributors.

Previously, there were many small distribution centres, but they have increased in size and their number has reduced.

The rationalisation and regrouping of deliveries took place with an increase in the control by retail groups which were able to achieve independent logistic strategies thanks to their own methods and infrastructures.

The centralisation of stocks in the 1970s and 1980s in the United Kingdom led to the establishment of large regional depots and, consequently, the closure of the smallest centres managed by producers or logistics specialists. It was above all in the second half of the 1980s that 'têtes de file', notably in food dominated distribution, invested in the renovation of their logistics and structures and the 'platforms' (distribution centres without storage space) came progressively under the control of retail distribution enterprises.

In France the organisation of the physical distribution of merchandise remained in the hands of manufacturers until the 1980s and it was delivered directly from their central depots, regional depots or through wholesalers. The situation then changed a little, and large retail distribution began to set up warehousing, platforms and - less frequently - vehicle transport centres. The centralisation of logistics suddenly accelerated in 1994, when France caught up with the United Kingdom (see Table 12).

Retailers decided to integrate logistics, and to establish the necessary infrastructures, above all for economic reasons (cost reductions) and to give a better service to clients.

According to recent research (G.E.A., 1994), the provisioning of shops through centralised depots, and not directly by suppliers, allows for considerable economies of upto 2% of turnover.

This result is possible thanks to the following factors:

1. The regrouping of purchases in some sites allows manufacturers to plan deliveries better and to much reduce the costs of logistics.
2. The gathering of stocks in distribution centres, and thus the abolition or reduction of buffer stocks in shops allows for an increase in the sales area and a growth in the productivity of the structure without any increase in investment.
3. Stock reduction through the use of platform for splitting bulk shipments. In this case, stocks are, in a sense, 'returned' to be with producers.

All this has the effect of reducing average stocks at the different stages of provisioning the distribution channel.

Thanks to the restructuring of logistics, the British food distribution leader (Tesco) reduced the average movement time of stocks from 3 to 1.9 weeks between 1986 and 1991. British distributors have been the fastest to integrate logistics, and have obtained the best results (see Table 13). The costs of logistics in the United Kingdom are the lowest (see Table 14).

The centralisation of the whole logistic function can equally improve service quality:

1. Deliveries are more flexible.
2. The risk of stock shortages at points of sale is reduced.

Some distribution groups have delegated the management of centralised depots and merchandise transport to logistic services providers in order to reserve their human and financial resources for purely commercial activities. British distributors are undoubtedly the champions in this kind of procedure. They prefer it for the following reasons:

- They want very specialised logistic support. The British leaders need more sophisticated logistics than their continental counterparts because their assortments are deeper and include fresh and frozen products. The English market has efficient service providers of this kind which use the new technologies and share the costs and activities over numerous clients. In a situation of this kind, a distributor wanting to do everything itself risks not achieving the necessary critical mass for the function, not having the necessary technologies and, thus, lagging behind the competition.

- The British market includes very competent logistics services companies. They are the result of liberalisation of the sector which encourages the development of competition and the new technologies. This has not happened in other European markets where different legislation has protected national enterprises without encouraging innovation.

- The leaders of the British retail trade have obtained very high levels of profitability in purely commercial activity. This partly explains their lack of interest in logistics where the rate of profit is lower than average. Profit variation in Europe between the two sectors is less important.

Sub-contracting the physical distribution of merchandise allows commercial enterprises to have logistics structures without using capital, which can be diverted to network and marketing development.

The process of integration does not involve products all of the same kind. The role of wholesaling enterprises in provisioning retailers is inescapable in fresh products (fruit, vegetables, fish and meat) but it equally has an important place for pharmaceutical products, perfumes, paper, wood, and so on.

3.2. The structural and organisational development of producers

The reduction of barriers and formalities in international trade and the liberalisation of the transport sector have led to growth in the globalisation of the economy as well as to competition on the national market.

For manufacturers, one of the best ways to be competitive is to reduce production costs. Strategies to achieve this have most often concerned the specialisation of production units at the international level, the concentration on production in a small number of plants, and the reduction of all purchase costs as a result of rationalising supplier relationships. The restructuring of production is associated with that of logistics by the closure of some depots (made useless by the concentration of distribution), the establishment of minimal order systems and a policy of discounts to distributors encouraging direct deliveries and the use of full lorries. Once carried out, this restructuring produced economies of scale and long-term financial gains, thanks to the cost management.

Concentration is thus behind a reorganisation of wholesaling and distribution depots; wholesalers and distributors must adapt to the change of structure in production.

Many manufacturers have pursued size reduction and specialisation strategies in recent years - this has presented opportunities for wholesalers. Manufacturers have in effect often concentrated their activities on the most important clients and have eliminated the smallest ones, who can be served by wholesalers. The latter can pursue a 'low price' strategy of direct sales through catalogues or telemarketing, or a strategy based on a higher level of service.

Another tendency of manufacturers has been to externalise and sub-contract some activities, but in the context of a stable and long-term relationship. This can concern all the factors of production, include intermediate products, services such as transport and maintenance, as well as some 'professional' services like marketing, sales and merchandising.

3.3. The concentration of the sector through mergers and acquisitions

The concentration of the sector has increased in recent years, accompanying a series of mergers and acquisitions, seven of the 20 leading enterprises in the food sector are Swiss and four are German. The two largest enterprises account for 49% of the total turnover of the 20, and the top four account for 66% (see Table 15).

In clothing, eight of the 15 leading European enterprises are German. The first has 35%, and the leading four account for 70% of the total turnover of the 15 (see Table 16).

In furniture, twelve of the 15 leading European wholesalers are German. The four leaders account for 63% of the total turnover (see Table 17).

Eight of the top 15 household appliance enterprises are German. The leading four enteprises account for 45% of the total turnover (see Table 18).

In the toys sector, the four leading enterprises account for 46% of the total turnover (see Table 19). The subsidiaries of large manufacturers dominate the market, but the second position is taken by a large specialist chain.

Enterprises in the metals, fuels and drugs sectors are the most prevalent in the category of wholesaling of industrial goods (see Table 20).

In the last ten years the majority of mergers and acquisitions involved wholesalers in consumer goods which were bought up by manufacturers and retail distributors (see Table 21). Generally, the buyers were large groups active in at least the European area. In nearly all the sub-sectors - except food and beverages products where large distributors still predominate - manufacturers most often bought wholesalers. Wholesalers also bought up other wholesalers, particularly in the household goods sector.

Mergers and acquisitions also occurred within the same sector, and small and medium-sized enterprises continued their conquest of more important parts of the market, seeking economies of scale and reduced costs.

These kinds of mergers and acquisitions were also encouraged, in some cases, by large manufacturers that wanted to limit their commercial relations to a reduced number of large partners rather than a large number of small enterprises.

The small wholesalers will fight competition from the large wholesalers by specialising their offer of smaller lines and products, targeting a clientele of small enterprises that are ignored by large wholesalers, and by increasing the services offered to their suppliers and clients.

3.4. The diffusion of new information technologies

Innovations in information technology can also contribute to putting wholesalers in difficulty, as they facilitate direct relations between manufacturers and distributors.

EDI is one example of an innovation of this type which now allows the automatic processing of orders, invoices, and other types of document. Thanks to EDI - and to sales details recorded in sales point terminals - the distributor can replenish his goods more easily and simply, and this reduces stock shortages.

These tools allow 'lead time' - the period between the preparation and execution of an order - to be reduced. This benefits distributors and producers, who can reduce the level of stocks in depots and thus costs.

The advantages obtained are considerable, particularly at the level of logistics. As has been seen, this has been the object of a structural development which has led European distributors to undergo vertical integration. To encourage these developments interface activities have been set up between trade and industry which necessarily have an effect on costs or service methods or both; they result in an integrated, more rationalised approach which tends to exclude wholesalers.

Moreover, wholesalers have also introduced computers into their enterprises in order to reduce their costs and improve their service. The technologies most frequently used in management are the following:

- stock bar codes, which are an indispensable condition for automated depot management;
- computer receipt of client orders and management of depots and the automatic mangement of orders in depots;
- electronic data exchange among wholesalers, suppliers and retailers, which permits non-paper transfer of orders, invoices, and all other information.

The new computer technologies have been developed essentially by large wholesalers, but their advantages can also be extended to small ones.

3.5. Wholesaler orientation to the retail trade and new formulae: 'cash and carry' and 'rack-jobbing'

Threatened by the development of large-scale distribution and by the restructuring of manufacturers, consumer goods wholesalers often respond by forward integration down stream with the retail sector. This integration is most often effected by the absorption of small independent traders through forward integration, franchising systems or co-operation. The large voluntary unions provide an example of this in the food sector; Spar and Markant in Germany, VEGE and A&O Selex in Italy - but it also occurs in non-food trade (domestic electrical appliances, games, and so on).

Forward integration allows wholesalers to have a direct view of the end market and thus to control results better.

Large purchasing centres have appeared. They are the result of co-operation between wholesalers that want to acquire a national, and then international, dimension. Access to the final market allows wholesalers to take better account of the importance of distribution marketing, and it thus encourages the acquisition of skills in the areas of the definition of assortments, the creation of distribution brands, advertising and promotional communication, the quality of logistics services, and so on.

This process often leads to a transformation of wholesalers. They become more like large branches, where the functions of wholesaling and retailing are more and more integrated. Within the trade sector, some wholesalers are subsidiaries of industrial groups.

'Cash and carry' and 'rack-jobbing' are two of the new wholesale formulae: the former allows the needs of small retailers to be met - these ask for low-priced products without much service. The latter allows distributors to introduce categories into their assortments that are difficult to manage by non-specialists. 'Rack-jobbers' offer assortment services and stock management, and generally take back unsold stock: they also share in the risks of retailing. 'Cash and carry' shops, originally reserved for professional clients, are now opening to the general public for the sale of more articles (clothing, shoes, household goods, and so on).

Another wholly new formula of recent years is that of the 'wholesale membership club', which opened in several sales points in the United Kingdom. These shops are American in origin, and had a great success in America in the 1980s. They are different from 'cash and carry' outlets in that they are open to anyone who pays an obligatory annual charge. Legislation in other European countries does not allow shops of this type to be opened, and for this reason the formula is limited to the British market for the present.

3.6. The supply of logistics and consultancy services by wholesalers

Wholesalers have progressively enlarged their assortments in order to benefit from the growth opportunities by offering more choice to their clients. They were forced to adapt to the proliferation of products and also to the reduction of the product life-cycle. With the development in demand, the management of distribution logistics becomes more complex and requires from the latter a need for a better service.

The logistics functions of wholesalers have widened and include stock management, supply to third parties, maintenance and after-sales service. At the same time, the providers of logistics services offer an alternative to manifacturers for distribution and, consequently, the choice of distributing implies that wholesalers will be in direct competition with these logistics specialists.

An alternative strategy consists of diversifying in retail sales, as has been seen, and retaining the essential wholesaling function but giving responsibility for the distribution process to a logistics company.

Wholesalers have a role to play with regard to producers in certain marketing functions: sales assistance, encouragement to develop new products, promotion and sales themselves. Manufacturers also seek, in certain cases, to increase their influence, both to improve, but above all to protect, their control. Wholesalers are often less appreciated in this function. Consumer goods wholesalers can, however, be of advantage to manufacturers by managing all of the product chain and merchandising certain products, via in certain distribution channels and for certain clients (books and records, for example).

In some areas, notably clothing, the wholesaler is the guarantor of the service offered to the end user: faced with a reduced product life-cycle, the wholesaler can reduce client uncertainty by bearing the risk of unsold items and, faced with the variability of demand, offer his understanding of market trends to improve the supply. The wholesaler thus re-orients an activity by giving retailers assistance about the range of products and advice about logistics.

3.7. The internationalisation of the economy and the reactions of wholesalers

The establishment of the European market and the opening of non-European markets has brought new needs for wholesaling services and specialist logistics for producers and distributors. Traditional wholesalers do not have the competencies needed for confronting the complexity of international operations of producers and distributors.

The growth in imports has encouraged the development of national subsidiaries of large foreign enterprises which often replace wholesale importers. The extension of supply-zones, the specialisation of sites of production and ever-more frequent relocations have opened the way to a redistribution of wholesaler capacities as part of the supply process.

In recent years wholesalers have thus actively developed internationalisation strategies, in response to those of their clients, manufacturers and distributors.

Wholesaler internationalisation can take different forms: direct development, acquisitions and mergers abroad, the establishment of joint ventures, international buying alliances, and so on.

Direct development is more rare, because the investment needed is high and the risks are great. It is most often found in the more modern formulae, such as 'cash and carry'. The sector leader, the German Metro, is present in all European countries. Metro has a better know-how than its competitors and is an enterprise of major size. Already positioned in Denmark, Austria, France, Italy, Holland, Hungary and Turkey, Metro recently acquired (October 1997) the 86 Makro shops, of which it holds about 40% of the capital. By this acquisition Metro enters the United Kingdom, the Netherlands, Belgium, Spain, Portugal, Greece, Poland, the Czech Republic and Morocco.

Mergers and acquisitions have been frequent in recent years, and they are connected to internationalisation since a good part of them were decided upon within a plan of international expansion. The percentage of international mergers and acquisitions out of the total of all mergers and acquisitions has been high (see Table 22). Wholesalers have carried out relatively more international mergers and acquisitions than retailers, and they are just behind manufacturers with 36% against 37%, while retailers only have 26%. For providers of logistics services 41% of their mergers and acquisitions are international. There is a difference between the different sectors since that of household products and food and beverages products, have benefited more from mergers and acquisitions than that of furniture and clothing.

This is not surprising if the very important role played by wholesalers in the last two categories is taken into account, while in the first two manufacturers have come to control the value chain better, integrating the activity of wholesaling and logistics more frequently. As is noted in the detail earlier, it is the enterprises of the smallest countries that are the most internationalised.

4. Conclusion

The wholesale trade is a very important sector in the European economy both because of its number of enterprises and the number of persons employed. Its presence is notably more important in some Member States than others. The distribution of enterprises, persons employed and turnover between the different wholesaling sectors also varies from country to country.

The functions and the role of wholesaling in the household goods sub-sector has been changed somewhat by the evolution of economic and technological trends which favour large-scale retailing and the provision of logistics services. Conversely, in sub-sectors serving production enterprises the trend to vertical integration of distribution is less evident (apart from certain exceptions, such as office supplies and 'do-it-yourself'), while many manufacturers are establishing subsidiary wholesalers, above all at the international level.

Enterprises react to new environmental trends and to competitive threats by following new strategies: national and international development to achieve and extend market share, the integration of retail trade, the adoption of new information technologies, the extension of the provision of services including diversification of the offer in the direction of logistics and consultancy.

Table 1: Number of distributive trade enterprises in the EEA and Switzerland

	Year	Wholesale trade (W)	Commission trade (C)	Sub total W+C	Retail trade (R)	Total W + C + R	W+C Share (%)	R Share (%)
EUR 15 [1]		**:**	**:**	**1 079 600**	**3 322 313**	**4 401 913**	**24.5**	**75.5**
Belgium [2]	1996	54 557	24 759	79 316	111 831	191 147	41.5	58.5
Danmark	1994	:	:	29 241	38 366	67 607	43.3	56.7
Deutschland	1993	118 150	60 154	178 304	408 414	586 718	30.4	69.6
Ellada [3]	1993	33 600	13 200	46 800	198 600	245 400	19.1	80.9
España	1992	69 582	3 483	73 065	569 700	642 765	11.4	88.6
France [3]	1994	84 228	21 900	106 128	417 200	523 328	20.3	79.7
Ireland [3]	1994	3 029	300	3 329	29 300	32 629	10.2	89.8
Italia [3]	1991	129 525	106 100	235 625	888 300	1124 025	20.0	80.0
Luxembourg	1994	1 738	247	1 985	2 929	4 914	40.4	59.6
Nederland	1994	55 500	20 300	75 800	102 900	178 700	42.4	57.6
Österreich [3]	1988	13 544	5 000	18 544	39 853	58 397	31.8	78.2
Portugal [3]	1993	31 000	20 400	51 400	132 094	183 494	28.0	72.0
Suomi/Finland	1992	10 247	1 725	11 972	28 300	40 272	29.7	70.3
Sverige	1995	36 005	2 987	38 992	54 777	93 769	41.6	58.4
United Kingdom	1994	:	:	129 099	299 749	428 848	30.1	69.9
Iceland [3]	1994	1 431	100	1 500	1 635	3 135	47.8	52.2
Norway [3]	1993	18 400	1 800	20 200	38 300	58 500	34.5	65.5
EEA	**:**	**:**	**:**	**1 101 300**	**3 362 248**	**4 463 548**	**24.7**	**75.3**
Switzerland	1991	18 460	1 269	19 729	41 935	61 664	32.0	68.0

[1] The EUR 15 figures are estimates based on the various reference years indicated in the table.
[2] Data for retail trade refer to 1995.
[3] *Source*: Eurostat 'Key figures for Commerce in the European Economic Area in the mid-1990s'.
Source: Eurostat.

Table 2: Main geographical and socio-economic indicators of the EEA and Switzerland (1.1.1996)

Country	Population (1 000)	Area per Km²	Density per Km²	Wholesale enterprises per 10 000 inhabitants	GDP per head PPS 1994
EUR 15	**372 662**	**3 236**	**115**	**21.6**	**16 641**
Belgique/België	10 143	31	332	53.8	18 800
Danmark [1]	5 251	43	122	56.3	19 143
Deutschland	81 845	357	229	14.6	18 326
Ellada	10 475	132	79	32.5	10 561
España	39 242	506	78	17.9	12 654
France	58 265	544	107	14.6	17 886
Ireland	3 591	70	51	8.5	14 171
Italia	57 331	301	190	22.8	17 086
Luxembourg	413	3	160	43.3	26 979
Nederland	15 493	42	373	36.2	17 317
Österreich	8 055	84	96	17.8	18 829
Portugal	9 921	92	108	31.4	11 432
Suomi/Finland	5 117	338	15	20.4	15 099
Sverige	8 838	450	20	40.8	16 230
United Kingdom [1]	58 684	244	240	22.2	16 442
Iceland	268	103	3	54.0	18 019
Norway	4 370	324	14	41.8	20 446
EEA	**377 331**	**3 663**	**103**	**21.9**	**16 681**
Switzerland	7 060	40	177	27.3	17 054 [2]

[1] Number of wholesale and commission trade enterprises per 10 000 inhabitants.
[2] 1993 data.
Source: Eurostat.

Table 3: Number of wholesale enterprises by activity in the EEA and Switzerland

	Year	Total	Agricultural raw materials	Food, beverages and tobacco	Non-food household goods	Non-agricultural intermediate products	Machinery, equipment and supplies	Other wholesale	
		Number	Share (%)						
EUR 15 [1]		**799 045**	**7.7**	**21.0**	**28.2**	**20.0**	**17.8**	**5.2**	**100.0**
Belgium	1996	54 557	9.7	19.2	36.3	18.2	12.6	4.0	100.0
Danmark [2]	1994	29 241	5.7	13.0	28.1	15.2	23.7	14.3	100.0
Deutschland	1993	118 150	8.0	15.5	31.6	22.6	19.8	2.5	100.0
Ellada [3]	1993	33 600	5.0	19.7	17.4	15.9	11.4	30.6	100.0
España	1992	69 582	6.5	33.4	20.1	21.9	16.7	1.4	100.0
France	1994	84 228	8.9	19.4	26.8	14.8	29.2	0.9	100.0
Ireland [3]	1994	3 029	6.0	24.7	19.3	12.8	20.8	16.4	100.0
Italia [3]	1991	129 525	8.5	26.1	31.8	21.2	11.3	1.1	100.0
Luxembourg	1994	1 738	5.4	13.6	15.9	20.5	31.8	12.8	100.0
Nederland	1994	55 500	10.4	12.1	34.4	21.1	22.0	:	100.0
Österreich	1988	13 544	11.6	9.1	23.5	20.6	24.6	10.6	100.0
Portugal [3]	1993	31 000	7.0	22.3	21.9	11.3	8.9	28.6	100.0
Suomi/Finland	1992	10 247	:	8.0	15.4	22.2	32.7	21.7	100.0
Sverige	1995	36 005	2.4	9.1	30.0	29.9	27.5	1.1	100.0
United Kingdom [4]	1994	129 099	2.3	12.7	23.9	15.6	10.4	35.0	100.0
Iceland	1994	1 431	:	:	:	:	:	:	100.0
Norway	1991	17 767	:	9.4	25.5	25.9	39.2	:	100.0
Switzerland	1991	18 460	4.8	11.8	36.8	22.0	20.7	3.9	100.0

[1] The EUR 15 figures are estimates based on the various reference years indicated in the table. Breakdown calculated excluding Denmark, Nederland, Finland and United Kingdom.
[2] The activity 'Other wholesale' includes commission trade.
[3] *Source:* Eurostat 'Key figures for Commerce in the European Economic Area in the mid-1990s'.
[4] Including commission trade.
Source: Eurostat.

Table 4: Number of persons employed in distributive trade enterprises in the EEA and Switzerland

	Year	Wholesale trade	Commission trade	Sub total W+C	Retail trade	Total W + C + R	W+C Share (%)	R Share (%)
EUR 15 [1]		**:**	**:**	**6 507 976**	**13 668 381**	**20 176 357**	**32.3**	**67.7**
Belgium	1995	165 531 [4]	4 213 [4]	168 744 [4]	182 000	350 744	48.1	51.9
Danmark	1994	:	:	156 334	184 000	340 334	45.9	54.1
Deutschland	1993	1 457 235	135 276	1 592 511	2 866 000	4 458 511	35.7	64.3
Ellada [2]	1993	88 000	20 000	108 000	471 000	579 000	18.7	81.3
España	1992	579 940	10 794	590 734	1 392 117	1 982 851	29.8	70.2
France [2]	1994	905 000	70 000	975 000	2 040	3 015 000	32.3	67.7
Ireland	1994	44 440	:	45 000 [2]	151 000	196 000	23.0	77.0
Italia	1991	:	:	902 672	2 389 000	3 291 672	27.4	72.6
Luxembourg	1994	10 737	474	11 211	19 564 [6]	30 775	36.4	63.6
Nederland	1994	399 700	:	402 900 [5]	636 700	1 039 600	38.8	61.2
Österreich	1988	174 270	8 442	182 712	254 000	436 712	41.8	58.2
Portugal [2]	1993	179 000	56 000	235 000	364 000	599 000	39.2	60.8
Suomi/Finland	1992	76 733	4 617	81 350	119 000	200 350	40.6	59.4
Sverige	1995	158 504 [4]	7 304 [4]	165 808 [4]	221 000	386 808	42.9	57.1
United Kingdom	1993	:	:	890 000 [4]	2 379 000 [7]	326 900	27.2	72.8
Iceland [3]	1994	6 865	:	7 000 [2]	8 000	15 000	46.7	53.3
Norway [3]	1991	107 000	3 400	110 400	123 000	233 400	47.3	52.7
EEA		**:**	**:**	**6 625 376**	**13 799 381**	**20 424 757**	**32.4**	**67.6**
Switzerland	1991	210 634	4 900	215 534	321 000	536 534	40.2	59.8

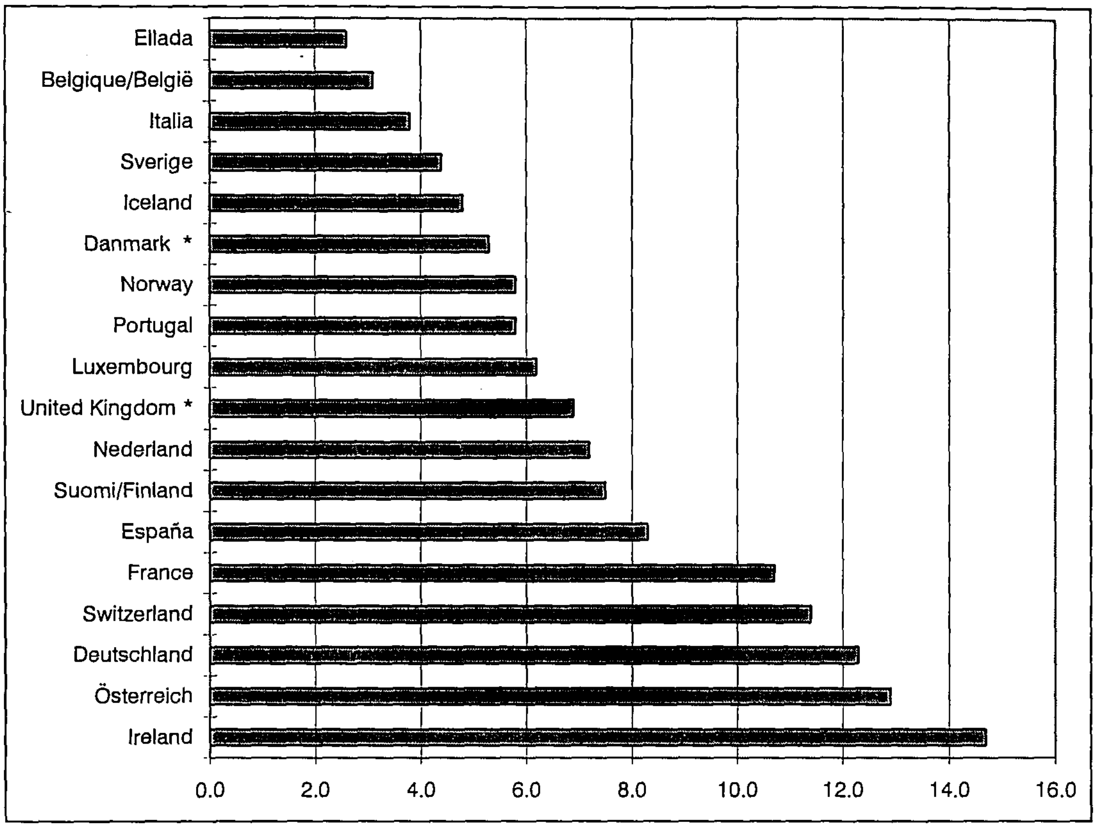
[1] The EUR 15 figures are estimates based on the various reference years indicated in the table.
[2] *Source*: Eurostat 'Key figures for Commerce in the European Economic Area in the mid-1990s'.
[3] In man years.
[4] Employees in employment.
[5] *Source*: Eurostat 'Retailing in the European Economic Area 1996'.
[6] Data for 1993, *Source*: Eurostat 'Retailing in the European Economic Area 1996'.
[7] Data for 1995, *Source*: Eurostat 'Retailing in the European Economic Area 1997'.
Source: Eurostat.

Table 5: Persons employed in wholesale trade by activity in the EEA and Switzerland

	Year	Total	Agricultural raw materials	Food, beverages and tobacco	Non-food household goods	Non-agricultural intermediate products	Machinery, equipment and supplies	Other wholesale	
		Number	Share (%)						
EUR 15 [1]		**6 187 096**	**5.3**	**21.8**	**24.5**	**22.9**	**20.7**	**4.8**	**100.0**
Belgium	1995	165 531	2.8	18.2	31.7	20.8	26.5	:	100.0
Danmark [2]	1994	156 334	6.8	13.6	20.5	20.4	30.8	7.7	100.0
Deutschland	1993	1 457 235	4.5	18.9	28.8	26.6	16.1	5.2	100.0
Ellada [3]	1993	88 000	6.3	15.8	24.0	15.4	15.3	23.2	100.0
España	1992	579 940	3.8	34.4	21.8	20.2	17.8	2.0	100.0
France [4]	1994	905 000	6.8	21.0	21.0	21.5	29.4	0.3	100.0
Ireland [3]	1994	44 440	5.0	26.4	17.2	17.3	20.4	13.7	100.0
Italia [2,3]	1991	902 672	4.9	27.1	31.1	21.4	13.1	2.4	100.0
Luxembourg	1994	10 737	3.7	23.2	13.6	22.5	30.2	6.8	100.0
Nederland	1994	399 700	8.4	16.3	24.8	22.7	27.8	:	100.0
Österreich	1988	174 270	11.0	13.1	24.8	19.5	25.7	6.0	100.0
Portugal [3]	1993	179 000	4.1	25.4	19.1	13.1	12.9	25.4	100.0
Suomi/Finland	1992	76 733	:	8.7	12.4	19.4	37.2	22.4	100.0
Sverige [5]	1995	158 504	3.6	14.9	23.6	27.5	29.8	0.6	100.0
United Kingdom [5,6]	1993	890 000	:	:	:	:	:	:	100.0
Iceland	1994	6 865	:	:	:	:	:	:	100.0
Norway	1991	107 000	:	15.7	17.3	27.6	39.4	:	100.0
Switzerland	1991	210 634	3.7	13.6	33.1	18.8	25.8	5.0	100.0

[1] The EUR 15 figures are estimates based on the various reference years indicated in the table. Breakdown calculated excluding Belgium, Danmark, Italy, Nederland, Finland and United Kingdom.
[2] The activity 'Other wholesale' includes commission trade.
[3] *Source*: Eurostat 'Key figures for Commerce in the European Economic Area in the mid-1990s'.
[4] Number of persons employed from Eurostat 'Key figures for Commerce in the European Economic Area in the mid-1990s', breakdown percentage from the national chapter.
[5] Employees in employment.
[6] Including commission trade.
Source: Eurostat.

Chart 1 - Persons employed per enterprise in wholesale trade in the EEA and Switzerland [1]



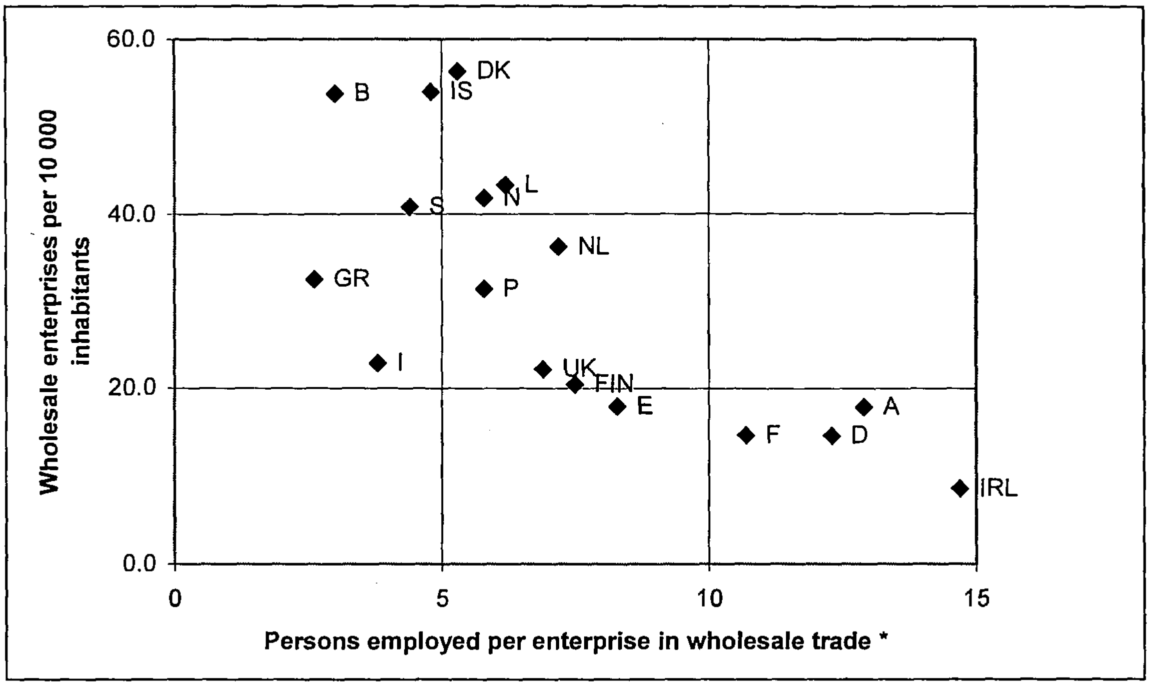
[1] Reference years for data on which the chart is based differ from country to country and are shown in table 6.
* Including commission trade.
Source: Eurostat.

Table 6: Persons employed per enterprise in wholesale trade by activity in the EEA and Switzerland

	Year	Total			Agricultural raw materials	Food, beverages and tobacco	Non-food household goods	Non-agricultural intermediate products	Machinery, equipment and supplies	Other wholesale
		Number of persons employed	Number of enterprises	Persons employed per enterprise	Persons employed per enterprise					
EUR 15 [1]		6 188 096	904 689	6.8	6.6	9.8	8.2	10.3	8.8	5.9
Belgium [2]	1995	165 531	54 105	3.1	0.9	2.9	2.6	3.4	6.4	:
Danmark [3]	1994	156 334	29 241	5.3	6.4	5.6	3.9	7.2	7.0	2.9
Deutschland	1993	1 457 235	118 150	12.3	6.9	15.0	11.2	14.5	10.0	25.5
Ellada [4]	1993	88 000	33 600	2.6	3.3	2.1	3.6	2.5	3.5	2.0
España	1992	579 940	69 582	8.3	4.8	8.6	9.1	7.7	8.9	11.5
France	1994	905 000	84 228	10.7	8.2	11.6	8.4	15.6	10.8	3.6
Ireland [4]	1994	44 440	3 029	14.7	12.2	15.7	13.1	19.8	14.4	12.3
Italia	1991	902 672	235 621	3.8	:	:	:	:	:	:
Luxembourg	1994	10 737	1 738	6.2	4.3	10.6	5.3	6.8	5.9	3.3
Nederland	1994	399 700	55 500	7.2	5.8	9.7	5.2	7.8	9.1	:
Österreich	1988	174 270	13 544	12.9	12.2	18.5	13.5	12.2	13.5	4.7
Portugal [4]	1993	179 000	31 000	5.8	3.4	6.6	5.0	6.7	8.4	5.1
Suomi/Finland	1992	76 733	10 247	7.5	:	8.2	6.0	6.5	8.5	7.7
Sverige [2]	1995	158 504	36 005	4.4	6.8	7.2	3.5	4.0	4.8	2.2
United Kingdom [2,5]	1993	890 000	143 820	6.2	:	:	:	:	:	:
Iceland	1994	6 865	1 431	4.8	:	:	:	:	:	:
Norway	1991	107 000	17 767	6.0	:	10.1	4.1	6.4	6.1	:
Switzerland	1991	210 634	18 460	11.4	8.8	13.2	10.3	9.7	14.2	14.6

[1] The EUR 15 figures are estimates based on the various reference years indicated in the table. Breakdown calculated excluding Belgium, Italy, Nederland, Finland, United Kingdom.
[2] Number of persons employed refers to employees in employment.
[3] The activity 'Other wholesale' includes commission trade.
[4] *Source*: Eurostat 'Key figures for Commerce in the European Economic Area in the mid-1990s'.
[5] Commission trade included.
Source: Eurostat.

Chart 2 - Wholesale trade systems in the EEA and Switzerland



* Reference years for data on which the chart is based differ from country to country and are shown in table 6.
Source: Eurostat.

Table 7: Turnover of wholesale trade enterprises by activity in some EEA countries and Switzerland

	Year	Total turnover	Agricultural raw materials	Food, beverages and tobacco	Non-food household goods	Non-agricultural intermediate products	Machinery, equipment and supplies	Other wholesale
		(Mio ECU)	Share (%)					
EU countries [1]		**1 902 503**	**8.7**	**23.2**	**22.4**	**27.1**	**15.1**	**3.5**
Belgium	1995	146 833	6.3	19.9	32.4	22.2	18.3	0.9
Danmark [2]	1994	57 052	9.9	19.4	18.5	27.5	19.5	5.3
Deutschland	1992	544 443	6.6	21.5	22.5	32.4	11.0	6.0
Ellada	:	:	:	:	:	:	:	:
España	1992	124 060	6.3	34.5	23.7	19.6	13.7	2.2
France	1994	356 091	14.1	26.1	18.6	22.6	18.2	0.3
Ireland	1994	14 679	:	:	:	:	:	:
Italia	1991	:	:	:	:	:	:	:
Luxembourg	1994	6 170	4.9	25.2	7.0	40.0	17.6	5.3
Nederland	1994	151 806	12.6	22.9	19.3	23.9	21.3	:
Österreich	1995	73 553	9.4	14.3	19.3	27.3	24.45	5.3
Portugal	:	:	:	:	:	:	:	:
Suomi/Finland	1992	27 088	:	14.1	7.5	22.4	25.9	30.1
Sverige	1994	62 340	4.4	23.6	18.9	33.3	19.8	:
United Kingdom	1993	380 635	2.8	17.6	:	:	:	:
Iceland	:	:	:	:	:	:	:	:
Norway	1991	43 404	:	24.6	14.2	35.1	26.1	:
Switzerland	1991	122 602	2.4	13.4	25.2	28.8	30.2	:

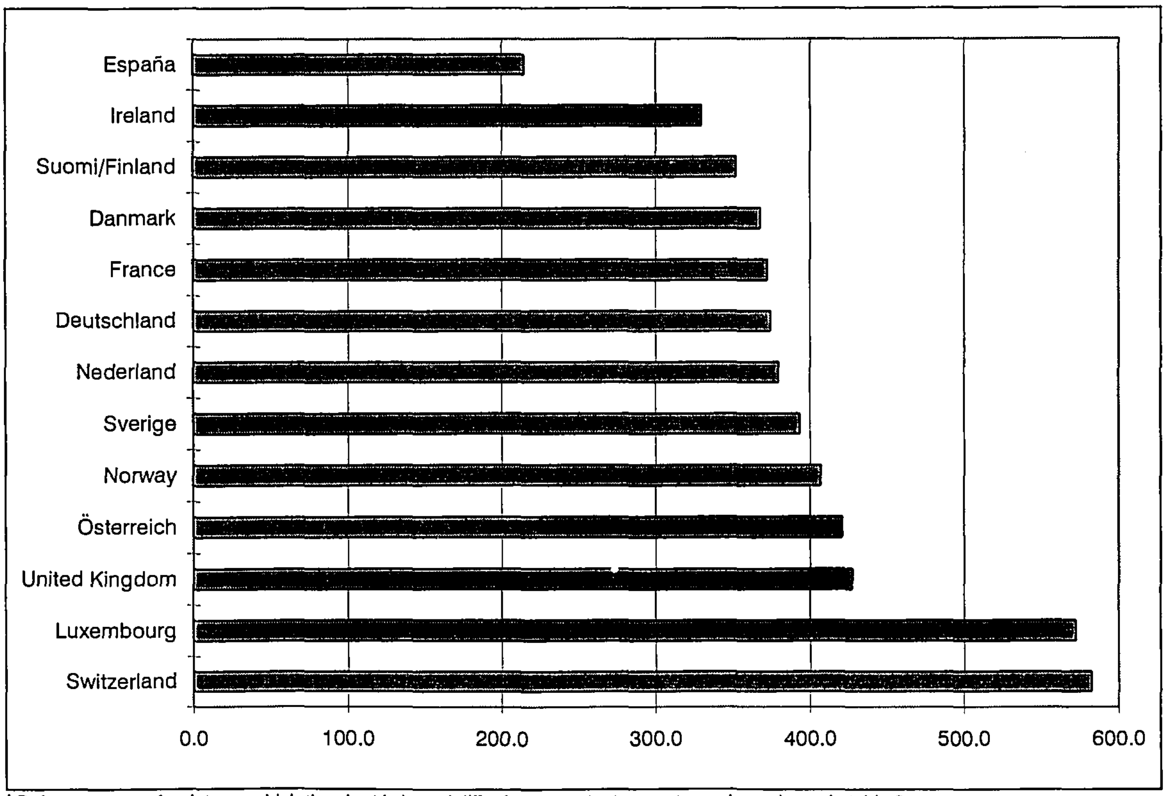
[1] The EU total and shares are estimates based on data for various reference years as indicated in the table. Total turnover excludes Ellada, Italy, Portugal; breakdown by activity calculated excluding Ellada, Ireland, Italy, Nederland, Portugal, Finland, Sverige, United Kingdom.
[2] The activity 'Other wholesale' includes commission trade.
Source: Eurostat.

Table 8: Turnover per person employed in wholesale trade enterprises in some EEA countries and Switzerland (1 000 ECU)

	Year	Total turnover per person employed	Agricultural raw materials	Food, beverages and tobacco	Non-food household goods	Non-agricultural intermediate products	Machinery, equipment and supplies	Other wholesale
Average EU countries [1]		**353.84**	**596.68**	**388.05**	**300.12**	**416.70**	**245.48**	**386.22**
Belgium	1995	897.12	:	:	:	:	:	:
Danmark [2]	1994	368.13	525.33	522.27	327.94	490.13	229.66	250.36
Deutschland	1992	374.64	549.76	425.11	293.57	455.82	256.01	432.68
España	1992	214.81	361.93	214.39	230.77	207.49	164.44	231.10
France	:	:	:	:	:	:	:	:
Ireland	1994	329.67	:	:	:	:	:	:
Italia		:	:	:	:	:	:	:
Luxembourg	1994	572.61	755.67	622.29	294.31	1 020.08	332.50	441.58
Nederland	1994	379.89	568.59	534.90	294.99	397.56	291.25	:
Österreich	1995	420.98	361.01	461.10	329.92	589.71	399.81	375.48
Suomi/Finland	1992	352.47	:	570.77	215.14	409.37	246.53	476.18
Sverige	1994	393.50	474.49	686.36	350.75	472.14	277.21	:
United Kingdom	1993	427.30	:	:	:	:	:	:
Iceland	:	:	:	:	:	:	:	:
Norway	1991	407.16	:	636.20	331.86	518.15	265.66	:
Switzerland	1991	582.59	380.83	572.65	441.04	893.99	684.11	:

[1] The EU averages are estimates based on data for various reference years as indicated in the table. The EU averages are calculated considering Danmark, Deutschland, España, France, Luxembourg, Österreich.
[2] The activity 'Other wholesale' includes commission trade.
Source: Eurostat.

Chart 3 - Turnover per person employed in wholesale trade enterprises in the EEA and Switzerland (1 000 ECU) [1]



[1] Reference years for data on which the chart is based differ from country to country and are shown in table 8.
Source: Eurostat.

Table 9: Turnover (Mio ECU) per enterprise in wholesale trade in some EEA countries and Switzerland

	Year	Total turnover per enterprise	Agricultural raw materials	Food, beverages and tobacco	Non-food household goods	Non-agricultural intermediate products	Machinery, equipment and supplies	Other wholesale
Average EU countries [1]		**3.53**	**3.84**	**4.15**	**2.76**	**4.90**	**2.58**	**3.37**
Belgium	1995	2.71	1.72	2.81	2.41	3.28	4.04	0.70
Danmark [2]	1994	1.95	3.36	2.92	1.28	3.53	1.61	0.73
Deutschland	1992	4.61	3.79	6.38	3.29	6.61	2.56	11.03
Ellada	:	:	:	:	:	:	:	:
España	1992	1.78	1.74	1.84	2.10	1.60	1.46	2.66
France	:	:	:	:	:	:	:	:
Ireland	1994	4.85	:	:	:	:	:	:
Italia	:	:	:	:	:	:	:	:
Luxembourg	1994	3.55	3.25	6.60	1.56	6.94	1.96	1.46
Nederland	1994	2.74	3.30	5.19	1.53	3.10	2.65	:
Österreich	1995	5.43	4.40	8.53	4.45	7.19	5.40	1.76
Portugal	:	:	:	:	:	:	:	
Suomi/Finland	1992	2.64	:	4.68	1.29	2.66	2.10	3.67
Sverige	1994	1.73	3.42	4.94	1.16	1.94	1.28	
United Kingdom	1993	2.95	:	:	:	:	:	:
Iceland	:	:	:	:	:	:	:	:
Norway	1991	2.44	:	6.43	1.36	3.32	1.62	:
Switzerland	1991	6.64	3.35	7.56	4.54	8.67	9.71	:

[1] The EU averages are estimates based on data for various reference years as indicated in the table. The EU averages are calculated considering Belgium, Danmark, Deutschland, España, France, Luxembourg, Österreich.
[2] The activity 'Other wholesale' includes commission trade.
Source: Eurostat.

Table 10: Value added in wholesale trade enterprises in some EEA and Switzerland

	Year	Value added (Mio ECU)	Value added per person employed (Mio ECU)	Value added per enterprise (Mio ECU)
Average EU countries [1]		232 178	45.32	361.30
Belgium	:	:	:	:
Danmark [2]	1994	13 005	83.18	444.74
Deutschland [2]	1993	68 918	40.78	370.52
Ellada	:	:	:	
España [2]	1992	18 259	30.91	249.91
France	1994	54 387	60.10	645.71
Ireland	1994	1 913	43.04	631.43
Italia	:	:	:	:
Luxembourg	1994	639	59.47	367.42
Nederland	1994	19 593	49.02	353.02
Österreich	1994	11 191	57.10	621.14
Portugal	:	:	:	:
Suomi/Finland [2]	1992	3 448	42.39	288.02
Sverige [3]	1994	8 065	50.88	224.01
United Kingdom [3]	1993	32 762	36.81	227.80
Iceland [4]	1994	261	38.03	182.45
Norway [4]	1991	2 214	20.70	124.64
Switzerland	1991	14 099	66.94	763.75

[1] The EU averages are estimates based on data for various reference years as indicated in the table. The Eu averages are calculated excluding Belgium, Ellada, Italy and Portugal.
[2] Includes commission trade.
[3] Value added per person employed considers only employees in employment.
[4] Value added per person employed considers employment in man-years.
Source: Eurostat.

Table 11: Intermediate consumption and personnel costs in wholesale enterprises in some EEA and Switzerland

	Year	Intermediate consumption		Personnel costs	
		Value (Mio ECU)	As % of production value	Value (Mio ECU)	As % of production value
Belgium	:	:	:	:	:
Danmark	:	:	:	:	:
Deutschland [1]	1993	27 577	28.6	46 515.5	67.5
Ellada	:	:	:	:	:
España [1]	1992	11 522	38.7	10 975.5	60.1
France	:	:	:	:	:
Ireland [2]	1994	:	:	923.1	48.3
Italia	:	:	:	:	:
Luxembourg	1994	392	38.1	291.0	45.6
Nederland	1994	12 032	40.9	11 527.8	58.8
Österreich	1988	:	:	3 939.6	57.9
Portugal	:	:	:	:	:
Suomi/Finland	:	:	:	:	:
Sverige	1994	:	:	5 114.6	63.4
United Kingdom	:	:	:	:	:
Iceland [3]	1994	211	:	181.6	69.5
Norway	:	:	:	:	:
Switzerland	1991	8 301	37.1	:	58.0

[1] Including commission trade.
[2] Wages and salaries.
[3] Value added at factor costs.
Source: Eurostat.

Table 12: Percentage of products distributed by a regional depot (% by sector)

	France	Deutschland	Italia	España	United Kingdom
Ultra-fresh products	75	60	20	70	65
Fresh	90	50	80	60	90
Preserves	90	75	95	95	97
Beverages	90	30	70	25	95
Frozen	90	20	20	10	80
Average	87	60	70	74	89

Source: G.E.A. 1994, Supplier-retailer collaboration in supply chain management, Europe, London: Coca-Cola retailing research group.

Table 13: Stock distribution throughout the logistic chain (stock-days)

	France	Deutschland	Italia	España	United Kingdom
Sales point	10.6	13.8	11.6	12.0	7.2
Regional platform	20.0	22.3	19.0	14.5	9.7
Supplier	12.8	14.2	11.7	16.0	11.7
Total	43.4	50.3	42.3	42.5	28.6

Source: G.E.A. 1994, Supplier-retailer collaboration in supply chain management, Europe, London: Coca-Cola retailing research group.

Table 14: Cost distribution throughout the logistic chain

	France / United Kingdom	Deutschland / España / Italia
Distributors	4.8	6.5
Producers	4.2	3.5
Total	9.0	10.0

Source: G.E.A. 1994, Supplier-retailer collaboration in supply chain management, Europe, London: Coca-Cola retailing research group.

Table 15: European top 20 grocery wholesalers (1993 - 1994)

No	Name	Country	Sales (Mio ECU)	Accounting year
1	Nestlé World Trade Corporation	CH	38 183	1994
2	Food Ingredients Specialties SA	CH	38 120	1994
3	Rewe & Co. Ohg.	D	14 609	1993
4	Sandoz Nutrition Trading Ltd	CH	10 651	1994
5	Casino Guichard Perrachon SA	F	9 502	1994
6	Coop Valais	CH	7 342	1994
7	Spar Handels-AG	D	6 886	1994
8	Edeka Zentralhandelsgesellschaft mbH	D	6 294	1993
9	Faellesforenigen for Danmarks Brugsforenigner Fdb	DK	2 952	1994
10	Booker Belmont Wholesale Ltd	DK	2 933	1994
11	SEITA - Société Nationale des Tabacs SA	F	2 369	1994
12	Nurdin & Peacock plc	UK	1 988	1994
13	Merkur AG	CH	1 958	1994
14	Ramsvita AG	CH	1 953	1994
15	Emil Tangelmann Ohg.	D	1 829	1994
16	Hofer & Curti AG	CH	1 724	1994
17	Système U Centre Regional Ouest	F	1 572	1994
18	Schuitema	NL	1 427	1994
19	Skandinavisk Holding A/S	DK	1 256	1994
20	Fyffes plc	IRL	1 101	1994

Source: European Commission (1997): *The Single Market Review*, vol. II.4: Distribution.

Table 16: European top 15 clothing wholesalers (1993 - 1994)

No	Name	Country	Sales (1 000 ECU)	Accounting year
1	Silkona Tekstil GmbH	D	2 216 000	1993
2	Pentland Group plc (footwear)	UK	816 000	1994
3	Wuensche AG (including about 20% groceries)	D	695 000	1994
4	Kaufring AG (apparel, piece goods and notions)	D	669 000	1994
5	Levi Strauss Germany GmbH	D	311 509	1994
6	Triumph International Vertriebs GmbH	D	270 176	1993
7	Jean Pascale AG	D	163 854	1993
8	Levi Strauss Continental SA	B	163 641	1994
9	Matalan Discount Club (Cash & Carry) Ltd	UK	163 613	1994
10	Levi Strauss Continental	F	159 256	1994
11	S. Oliver Bernd Freier GmbH & Co KG	D	134 899	1993
12	G. Güldenpfenning GmbH	D	131 122	1993
13	Diramode	F	127 001	1994
14	Simint Italia SpA	I	118 487	1993
15	Vergotex International NV	B	118 053	1994

Source: European Commission (1997): *The Single Market Review*, vol. II.4: Distribution.

Table 17: European top 15 furniture wholesalers (1992 - 1994)

No	Name	Country	Sales (1 000 ECU)	Accounting year
1	Musterhaus-Küchen Deutschland & Co GmbH	D	1 106 174	1993
2	Möbel Großvertriebs-Gesellschaft mbH	D	907 500	1993
3	IKEA Lager u. Service GmbH	D	703 038	1994
4	GFM Möbeleinkaufsverbund	D	647 516	1994
5	Kaiser & Kraft GmbH	D	302 714	1993
6	SSI Schäffer-Shop GmbH	D	248 214	1994
7	MMZ Marken Möbel Zentrale	D	234 724	1993
8	IKEA Wholesale Belgium SA	B	203 667	1994
9	Möbel-Franz GmbH	D	188 859	1994
10	IKEA Trading u. Design AG	CH	157 046	1992
11	Trend Möbelhandels-GmbH & Co	D	144 072	1994
12	Friedrich A. Flamme GmbH & Co KG	D	134 899	1994
13	SB Möbel GmbH	D	134 899	1994
14	Metro-Libre service de Gros	F	118 064	1994
15	Whonwelt Pallen GmbH & Co KG	D	105 221	1994

Source: European Commission (1997): *The Single Market Review*, vol. II.4: Distribution.

Table 18: European top 15 household appliance wholesalers (1992 - 1995)

No	Name	Country	Sales (1 000 ECU)	Accounting year
1	Rexel (conduct both retail and wholesale and should not be considered as a typical wholesaler)	F	3 216 000	1994
2	Kriskou SA	EL	2 170 000	1994
3	Promarkt Electronic GmbH & Co	D	2 158 000	1994
4	Sony Europe BV	NL	1 869 000	1995
5	Komet Electronic GmbH	D	1 510 000	1994
6	Sony Deutschland GmbH	D	1 203 000	1994
7	Metro Einkaufsgesellschaft mbH	A	1 172 000	1993
8	Panasonic Deutschland GmbH	D	1 144 000	1995
9	Weltfunk Elektronische Handels-GmbH	D	1 079 000	1992
10	Rapho Service AG	CH	1 077 000	1992
11	Hitachi Europe Ltd	UK	1 074 000	1995
12	Rüfach GmbH & Co	D	933 503	1994
13	Panasonic UK Ltd	UK	844 210	1995
14	Grundig Vertriebs-GmbH	D	725 467	1994
15	Sharp Electronic Europe GmbH	D	704 354	1994

Source: European Commission (1997): *The Single Market Review*, vol. II.4: Distribution.

Table 19: European top 15 toys wholesalers (1991 - 1994)

No	Name	Country	Sales (1 000 ECU)	Accounting year
1	Sega Europe Ltd	UK	598 870	1994
2	Vedes AG	D	239 798	1993
3	Mattel France SA	F	193 492	1994
4	Lego GmbH	D	176 448	1994
5	Mattel UK Ltd	UK	161 738	1994
6	Sega France SA	F	157 750	1994
7	Nor-Cargo Bergenske AS	NO	157 568	1991
8	Lego Spielwaren AG	CH	140 939	1992
9	Hasbro UK Ltd	UK	138 110	1994
10	Warner Music GmbH	D	134 899	1994
11	Linea GIG SpA	I	115 002	1993
12	Nintendo UK Ltd	UK	113 553	1994
13	Toys 'R' US Iberica SA	E	92 831	1994
14	Bandai SA	F	95 290	1994
15	Tyco Distribution	B	92 383	1994

Source: European Commission (1997): *The Single Market Review*, vol. II.4: Distribution.

Table 20: Wholesale distribution in industrial goods and drugs: largest European companies by turnover (1994)

No	Company	Country	Turnover (Mio ECU)	Group net income (Mio ECU)	Number of employees	Sector
1	Preussag AG	D	12 067	147	69 712	Metals and minerals
2	Metallgesellschaft AG	D	10 654	-1 403	26 324	Metals and minerals
3	Italiana Petroli SPA	I	8 326	38	1 648	Petroleum and related products
4	Lagardère Groupe SCA	F	8 060	94	40 326	Publishing
5	Gehe AG	D	7 905	72	11 313	Drugs
6	NV Koninklijke KNP BT	NL	6 097	151	27 811	Paper products
7	Office Commercial Pharmaceutique	F	5 091	34	5 612	Drugs
8	Wolseley plc	UK	4 252	177	19 073	Hardware
9	Cockerill Sambre SA	B	4 206	20	26 409	Metals and minerals
10	Baywa AG	D	3 426	8	11 952	Lumber and construction materials
11	Poliet SA	F	3 171	125	17 762	Lumber and construction materials
12	Hagemeyer NV	NL	2 191	68	9 279	Electrical goods
13	Apoteksbolaget AB	S	2 051	36	11 196	Drugs
14	CEBECO-Handelsraad BA	NL	2 012	10	4 698	Farm supplies
15	Computer 2000 AG	D	2 000	3	2 136	Computer and related products
16	Ferrostaal AG	D	1 874	31	1 912	Metals and minerals
17	Andreae-Noris Zahn AG	D	1 786	14	3 361	Drugs
18	Unichem plc	UK	1 709	38	5 535	Drugs
19	John Menzies plc	UK	1 646	35	12 261	Publishing
20	Otra NV	NL	1 607	36	5 885	Electrical goods
21	Hunting plc	UK	1 453	19	13 588	Petroleum and related products
22	Gestetner Holdings plc	UK	1 289	8	10 614	Office equipment
23	Monberg & Thorsen Holding A/S	DK	1 032	8	4 463	Drugs
24	Arus SA	F	940	-16	3 929	Metals and minerals
25	Det Danske Traelastkompagni A/S	DK	918	21	3 439	Lumber and construction materials
26	J. Bibby & Sons plc	UK	817	-24	7 298	Industrial machinery and equipmen
27	Danka Business Systems plc	UK	673	41	5 945	Office equipment
28	Farnell Electronics plc	UK	663	50	4 165	Electrical goods

Source: European Commission (1997): *The Single Market Review*, vol. II.4: Distribution.

Table 21: Who bought the wholesalers?

	Food and drink (%)	Clothing (%)	Furniture (%)	Household appliances (%)
Wholesalers	11	8	11	17
Manufacturers	38	62	60	57
Retailers	33	17	15	19
Suppliers of logistics services	3	:	:	:
Other [1]	15	13	14	7

[1] The group 'Other' includes acquirers such as: banks, investors, holding companies and management buy-outs.
Source: The Single Market review: Distribution, Office for Official Publications of the European Communities, 1997.

Table 22: Share of international mergers and acquisitions (M&A) as a percentage of total M&A

	Manufacturers	Wholesalers	Retailers	Suppliers of logistics services	Average
Food and drink	43	36	26	:	39
Clothing	28	29	22	:	27
Furniture	29	32	14	:	27
Household appliances	59	58	36	:	54
General	:	:	:	42	42
Average	37	36	27	41	36

Source: The Single Market review: Distribution, Office for Official Publications of the European Communities, 1997.

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Table B1: Number of wholesale and commission trade enterprises by activity, Belgium (1994 - 1996) [1]

Activity	Enterprises						Growth (%)	Average annual growth rate (%)
	Number			Share (%)				
	1994	1995	1996	1994	1995	1996	1996/94	1996/94
Agricultural raw materials and food	**15 703**	**15 748**	**15 766**	**20.1**	**19.9**	**19.9**	**0.4**	**0.2**
Agricultural raw materials	5 461	5 368	5 269	7.0	6.8	6.6	-3.5	-1.8
Food, beverages and tobacco	10 242	10 380	10 497	13.1	13.1	13.2	2.5	1.2
Non-food household products	**19 773**	**19 776**	**19 784**	**25.3**	**25.0**	**24.9**	**0.1**	**0.0**
Textiles, clothing and footwear	6 071	6 120	6 063	7.8	7.7	7.6	-0.1	-0.1
Equipment for professional or domestic use	1 886	1 938	1 954	2.4	2.5	2.5	3.6	1.8
Pharmaceutical and medical goods, cosmetics and cleaning materials	3 419	3 405	3 401	4.4	4.3	4.3	-0.5	-0.3
Other household goods	8 397	8 313	8 366	10.7	10.5	10.5	-0.4	-0.2
Intermediate products and machinery	**16 278**	**16 578**	**16 795**	**20.8**	**21.0**	**21.2**	**3.2**	**1.6**
Non-agricultural intermediate products	9 950	9 937	9 915	12.7	12.6	12.5	-0.4	-0.2
Industrial machinery and equipment	6 328	6 641	6 880	8.1	8.4	8.7	8.7	4.3
Other wholesale	**1 622**	**2 003**	**2 212**	**2.1**	**2.5**	**2.8**	**36.4**	**16.8**
Commission trade	**24 754**	**24 890**	**24 759**	**31.7**	**31.5**	**31.2**	**0.0**	**0.0**
Total	**78 130**	**78 995**	**79 316**	**100.0**	**100.0**	**100.0**	**1.5**	**0.8**

[1] At 31 December.
Source: Social Security Register.

Table B2: Number of local units with personnel in wholesale and commission trade, Belgium (1992 - 1995)

	1992		1994		1995		Growth (%)	Average annual growth rate (%)
	Number	Share %	Number	Share %	Number	Share %	1995/92	1995/92
Agricultural raw materials and food	**4 376**	**21.4**	**4 261**	**20.9**	**4 407**	**20.5**	**0.7**	**0.2**
Agricultural raw materials	1 063	5.2	1 018	5.0	1 055	4.9	-0.8	-0.3
Food, beverages and tobacco	3 313	16.2	3 243	15.9	3 352	15.6	1.2	0.4
Non-food household products	**6 613**	**32.3**	**6 308**	**30.9**	**6 510**	**30.3**	**-1.6**	**-0.5**
Textiles, clothing and footwear	1 371	6.7	1 330	6.5	1 379	6.4	0.6	0.2
Equipment for professional or domestic use	1 121	5.5	1 046	5.1	1 052	4.9	-6.2	-2.1
Pharmaceutical and medical goods, cosmetics and cleaning materials	1 357	6.6	1 313	6.4	1 449	6.7	6.8	2.2
Other household goods	2 764	13.5	2 619	12.8	2 630	12.2	-4.8	-1.6
Intermediate products and machinery	**7 299**	**35.6**	**7 491**	**36.7**	**8 412**	**39.2**	**15.2**	**4.8**
Non-agricultural intermediate products	3 400	16.6	3 462	17.0	3 928	18.3	15.5	4.9
Industrial machinery and equipment	3 899	19.0	4 029	19.8	4 484	20.9	15.0	4.8
Other wholesale	**596**	**2.9**	**623**	**3.1**	**561**	**2.6**	**-5.9**	**-2.0**
Commission trade	**1 593**	**7.8**	**1 702**	**8.3**	**1 593**	**7.4**	**0.0**	**0.0**
Total	**20 477**	**100.0**	**20 385**	**100.0**	**21 483**	**100.0**	**4.9**	**1.6**

Source: Social Security Register.

Table B3: Number of employees in wholesale and commission trade local units, Belgium (1992 - 1995)

	1992		1994		1995		Growth (%)	Average annual growth rate (%)
	Number	Share %	Number	Share %	Number	Share %	1995/92	1995/92
Agricultural raw materials and food	**35 701**	**20.0**	**34 899**	**20.3**	**34 446**	**20.1**	**-3.5**	**-1.2**
Agricultural raw materials	4 809	2.7	4 760	2.8	4 531	2.6	-5.8	-2.0
Food, beverages and tobacco	30 892	17.3	30 139	17.5	29 915	17.5	-3.2	-1.1
Non-food household products	**56 206**	**31.5**	**53 904**	**31.4**	**52 187**	**30.5**	**-7.2**	**-2.4**
Textiles, clothing and footwear	7 070	4.0	6 595	3.8	6 519	3.8	-7.8	-2.7
Equipment for professional or domestic use	12 609	7.1	11 982	7.0	10 833	6.3	-14.1	-4.9
Pharmaceutical and medical goods, cosmetics and cleaning materials	18 142	10.2	18 666	10.9	18 893	11.0	4.1	1.4
Other household goods	18 385	10.3	16 661	9.7	15 942	9.3	-13.3	-4.6
Intermediate products and machinery	**79 671**	**44.7**	**76 204**	**44.3**	**77 898**	**45.5**	**-2.2**	**-0.7**
Non-agricultural intermediate products	33 887	19.0	33 534	19.5	34 144	20.0	0.8	0.3
Industrial machinery and equipment	45 784	25.7	42 670	24.8	43 754	25.6	-4.4	-1.5
Other wholesale	**2 916**	**1.6**	**2 669**	**1.6**	**2 305**	**1.3**	**-21.0**	**-7.5**
Commission trade	**3 807**	**2.1**	**4 219**	**2.5**	**4 213**	**2.5**	**10.7**	**3.4**
Total	**178 301**	**100.0**	**171 895**	**100.0**	**171 049**	**100.0**	**-4.1**	**-1.4**

Source: Social Security Register.

Table B4: Number of wholesale and commission trade enterprises, registered for VAT, Belgium (1992 - 1995) [1]

Activity	Enterprises [1]						Growth (%)	Average annual growth rate (%)
	Number			Share (%)				
	1992	1994	1995	1992	1994	1995	1995/92	1995/92
Agricultural raw materials and food	**15 222**	**15 120**	**15 083**	**21.1**	**20.2**	**19.9**	**-0.9**	**-0.3**
Agricultural raw materials	5 631	5 488	5 389	7.8	7.3	7.1	-4.3	-1.5
Food, beverages and tobacco	9 591	9 632	9 694	13.3	12.9	12.8	1.1	0.4
Non-food household products	**21 259**	**21 890**	**22 251**	**29.5**	**29.2**	**29.3**	**4.7**	**1.5**
Textiles, clothing and footwear	5 685	5 742	5 808	7.9	7.7	7.7	2.2	0.7
Equipment for professional or domestic use	4 798	5 052	5 151	6.7	6.7	6.8	7.4	2.4
Pharmaceutical and medical goods, cosmetics and cleaning materials	2 471	2 491	2 450	3.4	3.3	3.2	-0.8	-0.3
Other household goods	8 305	8 605	8 842	11.5	11.5	11.7	6.5	2.1
Intermediate products and machinery	**14 503**	**15 015**	**15 441**	**20.1**	**20.1**	**20.4**	**6.5**	**2.1**
Non-agricultural intermediate products	5 904	6 111	6 160	8.2	8.2	8.1	4.3	1.4
Energy products and miscellaneous ores and minerals	2 190	2 271	2 292	3.0	3.0	3.0	4.7	1.5
Raw materials and intermediate products	3 714	3 840	3 868	5.2	5.1	5.1	4.1	1.4
Industrial machinery and equipment	8 599	8 904	9 281	11.9	11.9	12.2	7.9	2.6
Other wholesale	**1 340**	**1 274**	**1 278**	**1.9**	**1.7**	**1.7**	**-4.6**	**-1.6**
Commission trade	**19 783**	**21 557**	**21 789**	**27.4**	**28.8**	**28.7**	**10.1**	**3.3**
Total	**72 107**	**74 856**	**75 842**	**100.0**	**100.0**	**100.0**	**5.2**	**1.7**

[1] Enterprises with a turnover of less than about 6 000 ECU may not be included in the counts in the table.
Source: Administration for VAT.

Table B5: Turnover of wholesale and commission trade enterprises, Belgium (1992 - 1995)

Activity	Turnover						Growth (%)	Average annual growth rate (%)
	Value (Mio BEF)			Share (%)				
	1992	1994	1995	1992	1994	1995	1995/92	1995/92
Agricultural raw materials and food	**1 317 079**	**1 436 552**	**1 480 362**	**37.0**	**25.4**	**24.9**	**12.4**	**4.0**
Agricultural raw materials	333 122	348 429	356 644	9.4	6.2	6.0	7.1	2.3
Food, beverages and tobacco	983 957	1 088 123	1 123 718	27.7	19.2	18.9	14.2	4.5
Non-food household products	**1 096 282**	**1 733 628**	**1 834 342**	**30.8**	**30.7**	**30.9**	**67.3**	**18.7**
Textiles, clothing and footwear	166 704	184 056	190 192	4.7	3.3	3.2	14.1	4.5
Equipment for professional or domestic use	292 498	304 029	320 794	8.2	5.4	5.4	9.7	3.1
Pharmaceutical and medical goods, cosmetics and cleaning materials	58 518	303 905	333 157	1.6	5.4	5.6	469.3	78.6
Other household goods	578 562	941 638	990 199	16.3	16.6	16.7	71.1	19.6
Intermediate products and machinery	**891 327**	**2 186 796**	**2 291 309**	**25.1**	**38.7**	**38.6**	**157.1**	**37.0**
Non-agricultural intermediate products	566 542	1 198 592	1 256 103	15.9	21.2	21.1	121.7	30.4
Energy products and miscellaneous ores and minerals	533 173	943 935	997 533	15.0	16.7	16.8	87.1	23.2
Raw materials and intermediate products	33 369	254 657	258 570	0.9	4.5	4.4	674.9	97.9
Industrial machinery and equipment	324 785	988 204	1 035 206	9.1	17.5	17.4	218.7	47.2
Other wholesale	**23 408**	**46 640**	**54 388**	**0.7**	**0.8**	**0.9**	**132.3**	**32.4**
Commission trade	**228 757**	**251 933**	**282 867**	**6.4**	**4.5**	**4.8**	**23.7**	**7.3**
Total	**3 556 853**	**5 655 549**	**5 943 268**	**100.0**	**100.0**	**100.0**	**67.1**	**18.7**

Source: Administration for VAT.

Table B6: Exports of wholesale and commission trade enterprises, Belgium (1992 - 1995)

Activity	Exports						Growth (%)	Average annual growth rate (%)
	Value (Mio BEF)			Share (%)				
	1992	1994	1995	1992	1994	1995	1995/92	1995/92
Agricultural raw materials and food	**377 893**	**365 130**	**383 637**	**17.1**	**14.6**	**13.9**	**1.5**	**0.5**
Agricultural raw materials	109 874	116 214	129 705	5.0	4.7	4.7	18.0	5.7
Food, beverages and tobacco	268 019	248 916	253 932	12.1	10.0	9.2	-5.3	-1.8
Non-food household products	**782 754**	**937 124**	**1 073 535**	**35.4**	**37.6**	**38.9**	**37.1**	**11.1**
Textiles, clothing and footwear	53 396	66 277	72 676	2.4	2.7	2.6	36.1	10.8
Equipment for professional or domestic use	92 278	99 023	114 428	4.2	4.0	4.1	24.0	7.4
Pharmaceutical and medical goods, cosmetics and cleaning materials	58 518	111 603	133 859	2.6	4.5	4.8	128.7	31.8
Other household goods	578 562	660 221	752 572	26.1	26.5	27.3	30.1	9.2
Intermediate products and machinery	**891 327**	**1 043 029**	**1 120 086**	**40.3**	**41.8**	**40.6**	**25.7**	**7.9**
Non-agricultural intermediate products	566 542	524 394	576 166	25.6	21.0	20.9	1.7	0.6
Energy products and miscellaneous ores and minerals	533 173	493 279	543 692	24.1	19.8	19.7	2.0	0.7
Raw materials and intermediate products	33 369	31 115	32 474	1.5	1.2	1.2	-2.7	-0.9
Industrial machinery and equipment	324 785	518 635	543 920	14.7	20.8	19.7	67.5	18.8
Other wholesale	**23 408**	**19 509**	**23 638**	**1.1**	**0.8**	**0.9**	**1.0**	**0.3**
Commission trade	**138 791**	**129 271**	**159 694**	**6.3**	**5.2**	**5.8**	**15.1**	**4.8**
Total	**2 214 173**	**2 494 063**	**2 760 590**	**100.0**	**100.0**	**100.0**	**24.7**	**7.6**

Source: Administration for VAT.

Table B7: Purchases of wholesale and commission trade enterprises, Belgium (1992 - 1995)

Activity	Purchases						Growth (%)	Average annual growth rate (%)
	Value (Mio BEF)			Share (%)				
	1992	1994	1995	1992	1994	1995	1995/92	1995/92
Agricultural raw materials and food	**1 247 390**	**1 301 111**	**1 349 467**	**27.6**	**25.7**	**25.3**	**8.2**	**2.7**
Agricultural raw materials	319 220	328 460	336 334	7.1	6.5	6.3	5.4	1.8
Food, beverages and tobacco	928 170	972 651	1 013 133	20.5	19.2	19.0	9.2	3.0
Non-food household products	**1 342 487**	**1 554 206**	**1 650 452**	**29.7**	**30.8**	**30.9**	**22.9**	**7.1**
Textiles, clothing and footwear	143 099	154 810	164 867	3.2	3.1	3.1	15.2	4.8
Equipment for professional or domestic use	257 900	269 867	285 561	5.7	5.3	5.3	10.7	3.5
Pharmaceutical and medical goods, cosmetics and cleaning materials	192 090	255 282	279 152	4.2	5.1	5.2	45.3	13.3
Other household goods	749 398	874 247	920 872	16.6	17.3	17.2	22.9	7.1
Intermediate products and machinery	**1 700 031**	**1 934 159**	**2 046 534**	**37.6**	**38.3**	**38.3**	**20.4**	**6.4**
Non-agricultural intermediate products	1 005 139	1 061 066	1 142 016	22.2	21.0	21.4	13.6	4.3
Energy products and miscellaneous ores and minerals	806 800	846 064	921 299	17.8	16.7	17.3	14.2	4.5
Raw materials and intermediate products	198 339	215 002	220 717	4.4	4.3	4.1	11.3	3.6
Industrial machinery and equipment	694 892	873 093	904 518	15.4	17.3	16.9	30.2	9.2
Other wholesale	**30 133**	**40 270**	**46 788**	**0.7**	**0.8**	**0.9**	**55.3**	**15.8**
Commission trade	**202 548**	**223 630**	**247 399**	**4.5**	**4.4**	**4.6**	**22.1**	**6.9**
Total	**4 522 589**	**5 053 376**	**5 340 640**	**100.0**	**100.0**	**100.0**	**18.1**	**5.7**

Source: Administration for VAT.

Table B8: Investment by wholesale and commission trade enterprises, Belgium (1992 - 1995)

Activity	Investment						Growth (%)	Average annual growth rate (%)
	Value (Mio BEF)			Share (%)				
	1992	1994	1995	1992	1994	1995	1995/92	1995/92
Agricultural raw materials and food	**25 974**	**25 110**	**24 798**	**25.0**	**25.5**	**25.2**	**-4.5**	**-1.5**
Agricultural raw materials	4 559	5 465	4 827	4.4	5.5	4.9	5.9	1.9
Food, beverages and tobacco	21 415	19 645	19 971	20.6	19.9	20.3	-6.7	-2.3
Non-food household products	**24 469**	**23 794**	**26 954**	**23.6**	**24.1**	**27.4**	**10.2**	**3.3**
Textiles, clothing and footwear	5 500	6 786	8 173	5.3	6.9	8.3	48.6	14.1
Equipment for professional or domestic use	5 615	5 040	5 808	5.4	5.1	5.9	3.4	1.1
Pharmaceutical and medical goods, cosmetics and cleaning materials	4 046	3 312	3 402	3.9	3.4	3.5	-15.9	-5.6
Other household goods	9 308	8 656	9 571	9.0	8.8	9.7	2.8	0.9
Intermediate products and machinery	**45 178**	**40 269**	**36 495**	**43.5**	**40.8**	**37.2**	**-19.2**	**-6.9**
Non-agricultural intermediate products	23 008	19 294	17 297	22.2	19.6	17.6	-24.8	-9.1
Energy products and miscellaneous ores and minerals	14 827	9 966	8 839	14.3	10.1	9.0	-40.4	-15.8
Raw materials and intermediate products	8 181	9 328	8 458	7.9	9.5	8.6	3.4	1.1
Industrial machinery and equipment	22 170	20 975	19 198	21.3	21.3	19.5	-13.4	-4.7
Other wholesale	**1 783**	**1 965**	**3 103**	**1.7**	**2.0**	**3.2**	**74.0**	**20.3**
Commission trade	**6 453**	**7 487**	**6 876**	**6.2**	**7.6**	**7.0**	**6.6**	**2.1**
Total	**103 857**	**98 625**	**98 226**	**100.0**	**100.0**	**100.0**	**-5.4**	**-1.8**

Source: Administration for VAT.

DANMARK

1. Introduction and key statistics

The data in this chapter on wholesale trade and commission trade in Denmark are derived from two register-based sources: statistics on enterprises and employment statistics. The statistical unit in enterprise statistics is the legal unit; in register-based employment statistics it is the local unit. The economic data in this report are based on statistics of enterprises and the information on employment largely comes from register-based employment statistics.

The statistics on enterprises combine economic information from VAT statistics, register-based employment statistics and register-based accounts statistics. The statistical unit in VAT statistics is the unit registered for VAT, but the statistical unit in employment statistics is the local unit, as stated above. The statistical unit in register-based accounts statistics is the legal unit.

Because it is not always possible to find a perfect match between statistical units, the number of enterprises is overestimated. The number of local units is underestimated, however, since only local units with employment at the end of November are included.

2. The role of wholesale trade in the Danish economy

In 1994, 8.6% of all Danish enterprises and 6.6% of all local units in the Danish economy were in the wholesale trade. In the same year, 5.6% (156 334) of all persons employed in Denmark worked in the wholesale trade, but the wages and salaries of employees in the sector accounted for 7.1% of the total for the economy.

The total turnover in wholesaling in 1994 amounted to DKK 430 170 million, or 27% of the total turnover generated by all enterprises in Denmark. Gross value added from wholesale businesses accounted for 19% of the total gross value added in the economy. Gross value added as a percentage of turnover was 32% for the economy as a whole, but only 23% for wholesale trade.

The enterprises engaged in wholesale trade exported DKK 85 417 million in 1994 - equivalent to 23% of the exports generated by all Danish enterprises.

3. Wholesale trade structure in Denmark: local units

In 1994, 19 998 local units were engaged in wholesale trade in Denmark. The largest proportion of these (42%), were engaged in selling intermediate products. The second largest sector was non-food products, followed closely by agricultural equipment and food. These two areas accounted for 25% and 20% respectively of all local units in the wholesale trade.

The distribution by employment size class of local wholesale units was very similar to that of the total economy. As in the economy as a whole, most local units engaged in wholesale trade in 1994 were small businesses. At the end of November 1994, 82% of local wholesale units employed 1 to 9 persons, compared with 84% in the total economy.

4. Employment in the Danish wholesale trade

At the end of November 1994, 156 334 persons were working in the Danish wholesale sector, 93% as employees and only 7% self-employed. The proportions for the total economy were almost the same, with 92% employees and 8% self-employed. Only 30% of those working in the wholesale sector were women, compared with 45% in the total economy.

Most persons employed in the sector in 1994 were in the intermediate products branch. This branch accounted for a larger share of persons employed (51%) than of local units (42%). The non-food product and other wholesale trade branches employed only 20% and 8% respectively of all persons working in the wholesale trade, but accounted for 25% and 13% of all local units in the wholesale sector.

Also at the end of November 1994, a higher percentage of persons were employed in small firms in the wholesale trade than in the economy as a whole. 69% of those employed in the wholesale trade worked for businesses with fewer than 50 persons employed, compared with only 51% in the total economy. Enterprises with more than 100 persons employed accounted for only 16% of employment in the wholesale trade, but for 32% in the total economy.

The age distribution of wholesale-trade workers in Denmark in 1994 was similar to that of the total economy, except that 39% of wholesale workers were aged 25 to 39, compared with 34% of workers in the total economy.

5. Turnover, gross value added and exports in the Danish wholesale trade

In 1994 the turnover of wholesale-trade enterprises amounted to DKK 430 170 million. The enterprises generated a gross value added of DKK 98 054 million and exported the equivalent of DKK 85 417 million.

Once again, intermediate products generated the largest shares of turnover (47%), gross value added (56%) and exports (38%).

Wholesaling of agricultural materials and food accounted for relatively high shares of turnover (29%) and particularly exports (32%) compared with the sector's share of local units and employment, a result of the high shares of turnover (19%) and exports (25%) due to food, beverage and tobacco wholesaling. This sector's share of gross value added was considerably lower, however, at 11%. The intermediate products sector generated a relatively large share of total gross value added, at 56%. In particular, the non-agricultural intermediate products sub-sector accounted for a larger share (33%) than its numbers of local units and persons employed might suggest.

The distribution of turnover by size class showed that enterprises with 100 or more full-time employees generated only 34% of wholesaling turnover, but 44% of total turnover.

The distribution of gross value added in the wholesale trade by employment size class was close to the distribution in the economy as a whole.

The distribution of exports, on the other hand, differed significantly from that found in the total economy. Some 60% of wholesale exports, but only 32% of total exports, were generated by enterprises with fewer than 50 full-time employees. Enterprises with 100 or more full-time employees generated only 25% of wholesale exports compared with 59% of total exports.

Table DK1: Key statistics for wholesale and commission trade, Denmark (1993 - 1994)

	1993	1994
Number of enterprises	30 001	29 241
Number of local units [1]	20 381	19 998
Total persons employed [1]	153 597	156 334
Women	47 889	47 654
Employees	142 134	145 440
Self-employed	11 463	10 894
Turnover excluding VAT (Mio DKK)	399 219	430 170
Gross value added (Mio DKK)	90 532	98 054
Gross value added as % of turnover	23.0	23.0
Wages and salaries (Mio DKK)	31 333	32 963

[1] End of November.
Source: Danmark Statistik.

Table DK2: The role of wholesale and commission trade in the Danish economy (1994)

	Total economy	Wholesale trade	Wholesale trade (%)
Number of enterprises	341 330	29 241	8.6
Number of local units [1]	303 915	19 998	6.6
Total persons employed [1]	2 812 123	156 334	5.6
Women	1 260 301	47 654	3.8
Employees	2 583 099	145 440	5.6
Self-employed	229 024	10 894	4.8
Turnover excluding VAT (Mio DKK)	1 593 609	430 170	27.0
Gross value added (Mio DKK)	506 733	98 054	19.4
Gross value added as % of turnover	32.0	23.0	
Wages and salaries (Mio DKK)	465 995	32 963	7.1
Exports (Mio DKK)	363 762	85 417	23.5

[1] End of November.
Source: Danmark Statistik.

Table DK3: Number of wholesale and commission trade enterprises by activity, Denmark (1993 - 1994)

Activity	Enterprises			
	1993		1994	
	Number	Share (%)	Number	Share (%)
Agricultural raw materials and food	**5 567**	**18.6**	**5 460**	**18.7**
Agricultural raw materials	1 751	5.8	1 671	5.7
Food, beverages and tobacco	3 816	12.7	3 789	13.0
Non-food household products	**8 496**	**28.3**	**8 225**	**28.1**
Textiles, clothing and footwear	2 724	9.1	2 610	8.9
Other household goods	5 772	19.2	5 615	19.2
Intermediate products and machinery	**11 777**	**39.3**	**11 367**	**38.9**
Non-agricultural intermediate products	4 611	15.4	4 433	15.2
Industrial machinery and equipment	7 166	23.9	6 934	23.7
Other wholesale (including commission trade)	**4 161**	**13.9**	**4 189**	**14.3**
Total	**30 001**	**100.0**	**29 241**	**100.0**

Source: Danmark Statistik.

Table DK4: Number of wholesale trade local units [1] by activity, Denmark (1993 -1994)

Activity	Local units			
	1993		1994	
	Number	Share (%)	Number	Share (%)
Agricultural raw materials and food	**4 266**	**20.9**	**4 078**	**20.4**
Agricultural raw materials	1 636	8.0	1 532	7.7
Food, beverages and tobacco	2 630	12.9	2 546	12.7
Non-food household products	**5 078**	**24.9**	**5 009**	**25.0**
Textiles, clothing and footwear	:	:	:	:
Other household goods	:	:	:	:
Intermediate products and machinery	**8 586**	**42.1**	**8 409**	**42.0**
Non-agricultural intermediate products	3 586	17.6	3 468	17.3
Industrial machinery and equipment	5 000	24.5	4 941	24.7
Other wholesale (including commission trade)	**2 451**	**12.0**	**2 502**	**12.5**
Total	**20 381**	**100.0**	**19 998**	**100.0**

[1] End of November.
Source: Danmark Statistik.

Table DK5: Employment [1] in wholesale trade by activity, Denmark (1993 - 1994)

Activity	Persons employed			
	1993		1994	
	Number	Share (%)	Number	Share (%)
Agricultural raw materials and food	**32 008**	**20.8**	**31 994**	**20.5**
Agricultural raw materials	10 885	7.1	10 664	6.8
Food, beverages and tobacco	21 123	13.8	21 330	13.6
Non-food household products	**31 388**	**20.4**	**32 100**	**20.5**
Textiles, clothing and footwear	:	:	:	:
Other household goods	:	:	:	:
Intermediate products and machinery	**78 655**	**51.2**	**80 129**	**51.3**
Non-agricultural intermediate products	31 826	20.7	31 903	20.4
Industrial machinery and equipment	46 829	30.5	48 226	30.8
Other wholesale (including commission trade)	**11 546**	**7.5**	**12 111**	**7.7**
Total	**153 597**	**100.0**	**156 334**	**100.0**

[1] End of November.
Source: Danmark Statistik.

Table DK6: Local units and persons employed in wholesale trade by employment size-class (number of persons employed), Denmark (1994)

Size-class	Total economy		Wholesale trade			
	Local units	Persons employed	Local units		Persons employed	
	Share (%)	Share (%)	Number	Share (%)	Number	Share (%)
1-9	83.6	22.4	16 322	81.6	42 809	27.4
10-19	8.7	12.7	1 967	9.8	26 598	17.0
20-49	5.0	16.0	1 273	6.4	37 932	24.3
50-99	1.6	12.2	307	1.5	20 440	13.1
≥ 100	1.1	32.0	129	0.6	24 620	15.7
Fictitious units [1]	0	4.7	0	0	3 935	2.5
Total	**100.0**	**100.0**	**19 998**	**100.0**	**156 334**	**100.0**

[1] Employees work at locations other than that of the local unit itself.
Source: Danmark Statistik.

Table DK7: Number of persons employed [1] by age class, Denmark (1994)

Age class	Persons employed in total economy	Persons employed in wholesale trade	
	Share (%)	Number	Share (%)
<25	18.3	25 050	16.0
25-39	34.4	60 656	38.8
40-59	40.9	60 852	38.9
≥60	6.4	9 776	6.3
Total	**100.0**	**156 334**	**100.0**

[1] End of November.
Source: Danmark Statistik.

Table DK8: Turnover in wholesale trade by activity, Denmark (1993 - 1994)

Activity	Turnover			
	1993		1994	
	Value (Mio DKK)	Share (%)	Value (Mio DKK)	Share (%)
Agricultural raw materials and food	**127 282**	**31.9**	**125 917**	**29.3**
Agricultural raw materials	43 367	10.9	42 360	9.8
Food, beverages and tobacco	83 915	21.0	83 557	19.4
Non-food household products	**69 066**	**17.3**	**79 318**	**18.4**
Textiles, clothing and footwear	13 473	3.4	14 933	3.5
Other household goods	55 593	13.9	64 385	15.0
Intermediate products and machinery	**181 272**	**45.4**	**202 003**	**47.0**
Non-agricultural intermediate products	107 374	26.9	117 954	27.4
Industrial machinery and equipment	73 898	18.5	84 049	19.5
Other wholesale (including commission trade)	**21 599**	**5.4**	**22 932**	**5.3**
Total	**399 219**	**100.0**	**430 170**	**100.0**

Source: Danmark Statistik.

Table DK9: Gross value added in wholesale trade by activity, Denmark (1993 - 1994)

Activity	Gross value added			
	1993		1994	
	Value (Mio DKK)	Share (%)	Value (Mio DKK)	Share (%)
Agricultural raw materials and food	**17 258**	**19.1**	**17 920**	**18.3**
Agricultural raw materials	6 728	7.4	6 951	7.1
Food, beverages and tobacco	10 530	11.6	10 969	11.2
Non-food household products	**16 986**	**18.8**	**19 623**	**20.0**
Textiles, clothing and footwear	3 289	3.6	3 720	3.8
Other household goods	13 697	15.1	15 903	16.2
Intermediate products and machinery	**51 422**	**56.8**	**55 078**	**56.2**
Non-agricultural intermediate products	29 655	32.8	32 294	32.9
Industrial machinery and equipment	21 767	24.0	22 784	23.2
Other wholesale (including commission trade)	**4 866**	**5.4**	**5 433**	**5.5**
Total	**90 532**	**100.0**	**98 054**	**100.0**

Source: Danmark Statistik.

Table DK10: Exports in wholesale trade by activity, Denmark (1993 - 1994)

Activity	Exports 1993 Value (Mio DKK)	Exports 1993 Share (%)	Exports 1994 Value (Mio DKK)	Exports 1994 Share (%)
Agricultural raw materials and food	**29 666**	**36.3**	**27 416**	**32.1**
Agricultural raw materials	7 263	8.9	6 149	7.2
Food, beverages and tobacco	22 403	27.4	21 267	24.9
Non-food household products	**13 827**	**16.9**	**16 655**	**19.5**
Textiles, clothing and footwear	4 067	5.0	4 606	5.4
Other household goods	9 760	11.9	12 049	14.1
Intermediate products and machinery	**29 571**	**36.1**	**32 294**	**37.8**
Non-agricultural intermediate products	16 938	20.7	18 576	21.7
Industrial machinery and equipment	12 633	15.4	13 718	16.1
Other wholesale (including commission trade)	**8 763**	**10.7**	**9 052**	**10.6**
Total	**81 827**	**100.0**	**85 417**	**100.0**

Source: Danmark Statistik.

Table DK11: Turnover and gross value added in wholesale trade, by employment size-class (full-time employees), Denmark (1994)

Size-class	Total economy: Turnover Share (%)	Total economy: Gross value added Share (%)	Total economy: Exports Share (%)	Wholesale trade: Turnover Value (Mio DKK)	Wholesale trade: Turnover Share (%)	Wholesale trade: Gross value added Value (Mio DKK)	Wholesale trade: Gross value added Share (%)	Wholesale trade: Exports Value (Mio DKK)	Wholesale trade: Exports Share (%)
0-9	25.1	24.4	13.7	101 978	23.7	20 912	21.3	27 292	32.0
10-49	22.1	22.8	18.5	127 238	29.6	27 862	28.4	24 373	28.5
50-99	9.0	8.8	9.4	52 611	12.2	10 323	10.5	12 121	14.2
≥100	43.3	44.0	58.5	148 341	34.5	38 958	39.7	21 630	25.3
Total	**100.0**	**100.0**	**100.0**	**430 170**	**100.0**	**98 054**	**100.0**	**85 417**	**100.0**

Source: Danmark Statistik.

DEUTSCHLAND

1. Comments on methodology

Most of the figures given below come from the 1993 census of the distributive trades, hotels and catering. In addition, results from ongoing sample surveys of wholesale trade, cost structure statistics, turnover tax statistics, the microcensus (a small annual population inquiry) and national accounts have been analysed. The breakdown of activity is based on NACE Rev.1, but the national-accounts results are based on the previous version of the national classification of branches of the economy, and thus they also include wholesale or commission trade in motor vehicles and motorcycles. Since the national-accounts system generally incorporates adjustments to the raw data derived from the basic statistics, the tables based on this source (Tables D1 and D2) do not always agree with the other tables.

2. The role of wholesale trade in the German economy

In Germany, wholesale trade plays an important role as an intermediary dealing with the distribution of goods in both domestic and foreign trade. In 1993, there were 186 000 wholesale and commission trade enterprises, with 203 000 local units, employing a total of 1.7 million people (including part-time workers) and generating turnover (in 1992) of DEM 1 100 billion (net of turnover taxes). Thus 8.4% of all enterprises and 4.7% of all persons in employment in Germany belonged to the wholesale trade.

Wholesale trade contributed 4.5% of the gross value added for the total economy. Over the past few decades, wholesale trade has more or less maintained its position in the economy as a whole. This is remarkable since basic conditions in the branch have deteriorated. In particular, increasing concentration in industry and retailing have led enterprises to build up their own marketing and purchasing organisations and, as a result, direct marketing between manufacturers and the retail trade has increased at the expense of wholesalers.

It is noticeable that the percentage of part-time workers (just under 15%) and the share of female workers (39%) are smaller than the average for the economy as a whole.

3. Wholesale trade structure: branches

The structure of wholesale trade in Germany is very varied. The different forms of organisation range from traditional wholesale trade with storage facilities (wholesale suppliers) to the international forms of transit trade in which goods are both bought and sold in other countries. Wholesaling activities cover a wide spectrum of branches. In 1993, 28% of wholesale trade or commission trade enterprises were involved in raw materials, semi-finished products or machinery and equipment, also known as 'production-related trade', 21% involved non-food products, and 16% agricultural products or foodstuffs. A further third of enterprises were involved in commission trade.

In 1992, wholesale trade in intermediate products was the branch with the largest turnover: 43% of total turnover in the wholesale trade. It was followed by wholesale trade in agricultural materials and food and by wholesale in non-food products, with shares of 28% and 22% respectively.

4. Structure of turnover

In 1992, the turnover of wholesale-trade enterprises averaged DEM 9.3 million and commission trade just under DEM 0.3 million per enterprise. However, by definition, commission trade turnover covers only commissions received, and not the goods traded (the value of which averaged DEM 5.4 million per enterprise).

A distribution of enterprises by turnover size class shows that half of all wholesale trade enterprises had a turnover of under DEM 1 million in 1992. These small enterprises accounted for under 3% of total wholesale trade turnover, however. Only 1% of enterprises achieved a turnover of DEM 100 million or more, but their share of total turnover was 52%. The 100 enterprises with the largest turnover together accounted for 23% of total wholesale trade turnover, although wholesale trade is less highly concentrated than, for example, retail trade.

5. Structure of employment

Measured in terms of numbers of employees, wholesale trade and commission trade, like other areas of trade, are primarily the preserve of small and medium-sized businesses. In 1993, wholesale trade businesses employed twelve people on average and commission trade businesses two. Over three-quarters (78%) of wholesale trade enterprises and as many as 98% in commission trade had fewer than ten employees.

6. Types of business and legal forms

The vast majority of German wholesale-trade enterprises are involved in domestic trade. In 1992, foreign trade was the main activity of only 16% of enterprises, but with the introduction of the EU internal market there has been a substantial increase in this figure. Just under one-quarter of wholesale traders were concerned largely with 'direct-to-customer trading', that is with goods transported directly from the supplier to the purchaser without any intermediate storage.

It is rare for enterprises in the wholesale trade to have more than one outlet. In 1993, only 9% of firms had two or more local units, and 1% had five or more local units.

The vast majority of enterprises in the wholesale trade were sole proprietorships (42%) or operated in the form of a 'GmbH' (private limited company) (39%). Sole proprietorships dominated commission trade, with a share of 87%.

7. Regional distribution

In 1993, over 90% of enterprises in wholesale and commission trade were based in the 'old' Länder of the Federal Republic, earning as much as 95% of turnover. The 'new' Länder have a comparatively low share because wholesale operations are still being set up or restructured following the introduction of the market economy. At the same time, well-established West German wholesale enterprises have taken advantage of the gap in the market and immediately after unification extended their business activities to the new Länder. In 1992, around 40% of wholesale-trade turnover in the eastern part of Germany was earned by branch operations of West German enterprises. In fact, the market share of West German firms is probably even larger, since in some cases business can be conducted from the old Länder with the help of modern logistics and marketing systems.

The fact that wholesale trade is not confined to a particular locality in the same way as retail trade is another reason why wholesale trade has become concentrated in specific regions or cities such as Frankfurt am Main and Düsseldorf. The city states of Hamburg and Bremen are a special case, since wholesale trade, in particular import and export, has traditionally been of prime importance there owing to their geographical position. In relation to population, these two cities have had many more than the national average of 240 local units per 100 000 inhabitants.

8. Capital formation

Investment in fixed assets in wholesale trade amounted to just under DEM 13 billion in 1994. Over half of this sum (53%) came from businesses working in the intermediate consumption sector (raw materials, semi-finished products, machinery and equipment), 24% from wholesale trade in agricultural materials and foodstuffs and 18% from wholesale trade in non-food products. 70% of investment in fixed assets went on vehicles, machinery and equipment and 30% on land and buildings.

9. Cost structure and gross margin

It is typical of wholesale trade that the greatest share of costs arises from the purchase of goods. Other operating costs in the branches represented here accounted for between 11% and 21% in 1992, with about half attributable to labour costs.

In relation to turnover in 1994, gross margin varied considerably, from 15% in wholesale trade in agricultural materials and foodstuffs to 25% in wholesale trade in non-food products.

10. Changes in turnover since 1994

The variety of branches in wholesale trade and their special position as a link between the various stages of production and sales mean that wholesaling depends very much on short-term trends in the economy as a whole. In the long term, therefore, wholesale trade turnover can be seen as a reflection of the general economic situation, despite the wide variations which may arise and the differences in the economic situation in the different branches. Over the past few years, turnover in the wholesale trade has in general been stagnant. Between 1994 and 1996 there was very little change in nominal turnover, whilst the values at constant prices showed a decline of 1%.

Table D1: Key statistics for wholesale and commission trade, Germany [1] (1993)

	Value	Share (%)
Number of enterprises (1 000)	186	
Number of local units (1 000)	203	
Number of persons employed (1 000)	1 690	100.0
Employees (1 000)	1 504	89.0
Women	:	38.7
Full-time employees	:	85.5
Women	:	30.1
Part-time employees [2]	:	14.5
Women	:	89.1
Self-employed and family workers (1 000)	186	11.0
Turnover (Mio DEM)	1 090 800	
Turnover per person employed (DEM)	645 400	
Production value (Mio DEM)	187 200	
Production value as % of turnover		17.2
Intermediate consumption (Mio DEM)	53 500	
as % of production value		28.6
Gross value added at market prices (Mio DEM)	133 700	
as % of production value		71.4
Gross value added per person employed (DEM)	79 100	
Personel costs (Mio DEM)	90 240	
% of gross value added		67.5
Personnel costs per employee (DEM)	60 000	
Total fixed capital investments (Mio DEM)	21 300	100.0
Land and buildings (Mio DEM)	7 800	36.6
Equipment (Mio DEM)	13 500	63.4
Fixed capital investment per person employed (DEM)	12 600	

[1] Data in wholesale and commission trade include motorvehicles and motorcycles.
[2] Normal weekly working time less than 36 hours.
Source: Statistisches Bundesamt.

Table D2: The role of wholesale and commission trade in the economy, Germany[1] (1993)

	Total economy	Wholesale trade	Wholesale trade (%)
Number of enterprises (1 000)	2 214 [2]	186	8.4
Number of local units (1 000)	2 636 [2]	203	7.7
Number of persons employed (1 000)	35 842	1 690	4.7
Employees (1 000)	32 357	1 504	4.6
Women (%)	42.3	38.7	
Full-time employees (%)	83.7	85.5	
Women (%)	33.4	30.1	
Part-time employees (%) [3]	16.3	14.5	
Women (%)	88.1	89.1	
Self-employed and family workers (1 000)	3 485	186	5.3
Production value (Mio DEM)	6 074 400	187 200	3.1
Intermediate consumption (Mio DEM)	3 099 600	53 500	1.7
as % of production value	51.0	28.6	
Gross value added at market prices (Mio DEM)	2 974 800	133 700	4.5
Personnel costs (%)	58.5	67.5	
Gross value added per person employed (DEM)	83 000	79 100	
Total fixed capital investments (Mio DEM)	721 100	21 300	3.0
Buildings "	407 600	7 800	1.9
Equipment "	313 500	13 500	4.3
Fixed capital investments per person employed (DEM)	20 100	12 600	

[1] Data in wholesale and commission trade include motorvehicles and motorcycles.
[2] Estimate, including agricultural businesses.
[3] Normal weekly time less than 36 hours.
Source: Statistisches Bundesamt.

Table D3: Number of enterprises and local units in wholesale and commission trade by activity, Germany (1993)

Activity	Enterprises [1]		Local units	
	Number	Share (%)	Number	Share (%)
Agricultural raw materials and food	**27 723**	**15.5**	**31 351**	**16.1**
Agricultural raw materials	9 401	5.3	10 983	5.7
Food, beverages and tobacco	18 322	10.3	20 368	10.5
Non-food household products	**37 396**	**21.0**	**40 606**	**20.9**
Textiles, clothing and footwear	7 346	4.1	7 884	4.1
Electrical household appliances, radio and television goods	7 356	4.1	8 343	4.3
Pharmaceutical goods	3 851	2.2	4 285	2.2
Other	18 843	10.6	20 094	10.3
Intermediate products and machinery	**50 079**	**28.1**	**57 492**	**29.6**
Non-agricultural intermediate products	26 724	15.0	31 132	16.0
Industrial machinery and equipment	23 355	13.1	26 360	13.6
Other wholesale	**2 952**	**1.7**	**3 974**	**2.0**
Total wholesale trade	**118 150**	**66.3**	**133 423**	**68.6**
Commission trade	**60 154**	**33.7**	**60 958**	**31.4**
Total	**178 304**	**100.0**	**194 381**	**100.0**

1 As at april 1993.
Source: HGZ 1993.

Table D4: Turnover of wholesale and commission trade enterprises by activity, Germany (1992)

Activity	Enterprises [1]	Turnover		
	Number	Value (Mio DEM)	Share (%)	Average turnover per enterprise (Mio DEM)
Agricultural raw materials and food	**27 723**	**308 036**	**27.6**	**11.1**
Agricultural raw materials	9 401	72 036	6.5	7.7
Food, beverages and tobacco	18 322	236 000	21.1	12.9
Non-food household products	**37 396**	**248 378**	**22.3**	**6.6**
Textiles, clothing and footwear	7 346	38 067	3.4	5.2
Electrical household appliances, radio and television goods	7 356	65 219	5.8	8.9
Pharmaceutical goods	3 851	53 091	4.8	13.8
Other	18 843	92 001	8.2	4.9
Intermediate products and machinery	**50 079**	**477 568**	**42.8**	**9.5**
Non-agricultural intermediate products	26 724	356 788	32.0	13.4
Industrial machinery and equipment	23 355	120 780	10.8	5.2
Other wholesale	**2 952**	**65 792**	**5.9**	**22.3**
Total wholesale trade	**118 150**	**1 099 774**	**98.5**	**9.3**
Commission trade	**60 154**	**16 270**	**1.5**	**0.3**
Total	**178 304**	**1 116 044**	**100.0**	**6.3**

[1] As at April 1993.
Source: HGZ 1993.

Table D5: Turnover of wholesale and commission trade enterprises according to main and secondary activities, Germany (1992)

Activity	Turnover Value (Mio DEM)	Kind of activity: Wholesaling	Retailing	Commission trade	Production	Other
		Share (%)				
Agricultural raw materials and food	**308 036**	**96.1**	**3.1**	**0.1**	**0.3**	**0.3**
Agricultural raw materials	72 036	96.8	2.6	0.1	0.4	0.1
Food, beverages and tobacco	236 000	95.9	3.3	0.1	0.3	0.4
Non-food household products	**248 378**	**96.8**	**1.6**	**0.3**	**1.0**	**0.2**
Textiles, clothing and footwear	38 067	97.1	1.8	0.6	0.2	0.3
Electrical household appliances, radio and television goods	65 219	96.7	1.4	0.2	1.5	0.1
Pharmaceutical goods	53 091	97.5	0.8	0.1	1.5	0.2
Other	92 001	96.5	2.0	0.4	0.7	0.3
Intermediate products and machinery	**477 568**	**93.3**	**4.4**	**0.4**	**1.5**	**0.4**
Non-agricultural intermediate products	356 788	93.6	5.3	0.4	0.5	0.2
Industrial machinery and equipment	120 780	92.6	1.7	0.5	4.3	0.9
Other wholesale	**65 792**	**92.7**	**5.8**	**0.5**	**0.9**	**0.2**
Total wholesale trade	**1 099 774**	**94.9**	**3.5**	**0.3**	**1.0**	**0.3**
Commission trade	**16 270**	**18.1**	**1.6**	**78.8**	**0.7**	**0.8**
Total	**1 116 044**	**93.7**	**3.5**	**1.4**	**1.0**	**0.3**

Source: HGZ 1993.

Table D6: Distribution of wholesale and commission trade enterprises by turnover size-class, Germany (1992)

Activity	Enterprises	Number of enterprises by turnover size-class in Mio DEM: < 0.5	0.5 - 0.99	1 - 4.99	5 - 9.99	10 - 99.99	≥ 100
	Number	Share (%)					
Agricultural raw materials and food	**27 723**	**29.8**	**13.5**	**32.5**	**10.0**	**12.6**	**1.6**
Agricultural raw materials	9 401	32.0	14.0	32.7	9.8	10.8	0.7
Food, beverages and tobacco	18 322	28.7	13.2	32.5	10.1	13.5	2.0
Non-food household products	**37 396**	**42.8**	**13.3**	**27.3**	**7.1**	**8.6**	**0.9**
Textiles, clothing and footwear	7 346	40.0	13.4	28.1	8.5	9.4	0.6
Electrical household appliances, radio and television goods	7 356	39.2	12.3	28.6	8.1	10.2	1.6
Pharmaceutical goods	3 851	38.9	12.2	28.4	7.8	11.1	1.6
Other	18 843	46.1	13.9	26.3	6.0	7.1	0.6
Intermediate products and machinery	**50 079**	**36.4**	**12.6**	**29.5**	**8.9**	**11.4**	**1.3**
Non-agricultural intermediate products	26 724	34.4	11.3	27.8	10.1	14.5	1.8
Industrial machinery and equipment	23 355	38.6	14.2	31.4	7.4	7.8	0.6
Other wholesale	**2 952**	**43.2**	**12.9**	**24.8**	**6.3**	**10.1**	**2.7**
Total wholesale trade	**118 150**	**36.9**	**13.1**	**29.4**	**8.5**	**10.8**	**1.3**
Commission trade	**60 154**	**91.9**	**4.9**	**2.8**	**0.2**	**0.1**	**0.0**
Total	**178 304**	**55.5**	**10.3**	**20.4**	**5.7**	**7.2**	**0.8**

Source: HGZ 1993.

Table D7: Concentration by turnover in wholesale and commission trade, Germany (1992)

Turnover category (Mio DEM)	Wholesale trade		Commission trade	
	Turnover (%)	Cumulative turnover (%)	Turnover (%)	Cumulative turnover (%)
<0.5	1.8	1.8	38.9	38.9
0.5-0.99	1.0	2.8	12.3	51.2
1-1.99	2.1	4.9	9.5	60.7
2-4.99	5.3	10.2	10.0	70.7
5-9.99	6.4	16.6	5.7	76.4
10-24.99	11.2	27.8	6.4	82.8
25-49.99	10.0	37.8	3.2	86.0
50-99.99	10.1	47.9	1.4	87.4
100-249.99	14.1	62.0	6.1	93.5
250-999.99	15.7	77.7	6.5	100.0
≥ 1 000	22.3	100.0	0.0	100.0

Source: HGZ 1993.

Table D8: Concentration rates by turnover in wholesale and commission trade, Germany (1992)

Number of largest enterprises [1]	Wholesale		Commission trade	
	Turnover	Persons employed	Turnover	Persons employed
	Share (%)		Share (%)	
3	2.9	0.1	6.5	0.4
6	5.0	2.2	10.2	1.4
10	6.9	3.7	13.2	2.8
25	11.1	5.5	16.7	3.8
50	16.4	6.9	19.8	5.0
100	22.5	9.6	23.7	6.0

[1] Measured by turnover.
Source: HGZ 1993.

Table D9: Employment in wholesale and commission trade enterprises, Germany (1993)

Activity	Enterprises	Persons employed		Average number of persons employed per enterprise
	Number	Total	Share (%)	
Agricultural raw materials and food	**27 723**	**339 903**	**21.3**	**12.3**
Agricultural raw materials	9 401	64 928	4.1	6.9
Food, beverages and tobacco	18 322	274 975	17.3	15.0
Non-food household products	**37 396**	**419 426**	**26.3**	**11.2**
Textiles, clothing and footwear	7 346	66 796	4.2	9.1
Electrical household appliances, radio and television goods	7 356	94 508	5.9	12.8
Pharmaceutical goods	3 851	73 430	4.6	19.1
Other	18 843	184 692	11.6	9.8
Intermediate products and machinery	**50 079**	**622 667**	**39.1**	**12.4**
Non-agricultural intermediate products	26 724	388 184	24.4	14.5
Industrial machinery and equipment	23 355	234 483	14.7	10.0
Other wholesale	**2 952**	**75 239**	**4.7**	**25.5**
Total wholesale trade	**118 150**	**1 457 235**	**91.5**	**12.3**
Commission trade	**60 154**	**135 276**	**8.5**	**2.2**
Total	**178 304**	**1 592 511**	**100.0**	**8.9**

Source: HGZ 1993.

Table D10: Distribution of wholesale and commission trade enterprises by employment size-class, Germany (1993)

Activity	Enterprises	Number of persons employed [1]			
		1 - 2	3 - 5	6 - 9	≥10
	Number	Share (%)			
Agricultural raw materials and food	**27 723**	**38.8**	**26.5**	**13.8**	**20.8**
Agricultural raw materials	9 401	49.3	26.6	10.8	13.3
Food, beverages and tobacco	18 322	33.5	26.5	15.4	24.7
Non-food household products	**37 396**	**42.2**	**26.3**	**12.2**	**19.3**
Textiles, clothing and footwear	7 346	43.5	26.8	12.4	17.3
Electrical household appliances, radio and television goods	7 356	38.4	26.0	13.4	22.2
Pharmaceutical goods	3 851	36.6	26.0	13.5	23.9
Other	18 843	44.3	26.2	11.4	18.1
Intermediate products and machinery	**50 079**	**35.3**	**26.0**	**14.2**	**24.4**
Non-agricultural intermediate products	26 724	33.7	24.8	14.1	27.4
Industrial machinery and equipment	23 355	37.1	27.4	14.5	21.1
Other wholesale	**2 952**	**46.2**	**22.1**	**10.9**	**20.8**
Total wholesale trade	**118 150**	**38.5**	**26.1**	**13.4**	**22.0**
Commission trade	**60 154**	**80.0**	**15.6**	**2.8**	**1.6**
Total	**178 304**	**52.6**	**22.6**	**9.8**	**15.0**

[1] As 30 april 1993.
Source: HGZ 1993.

Table D11: Classification of wholesale enterprises by type of operation, Germany (1993)

Type of operation predominating	Total enterprises		Turnover		
	Number	Share (%)	Value (Mio DEM)	Share (%)	Average turnover per enterprise
Domestic trade	98 808	83.6	817 221	74.3	8.3
Interindustrial wholesale trade	63 052	53.4	453 885	41.3	7.2
Other wholesale trade	35 756	30.3	363 336	33.0	10.2
Foreign trade	19 342	16.4	282 553	25.7	14.6
Import trade	12 464	10.5	169 146	15.4	13.6
Interindustrial wholesale trade	5 814	4.9	88 198	8.0	15.2
Other wholesale trade	6 650	5.6	80 949	7.4	12.2
Export trade	5 105	4.3	75 960	6.9	14.9
Transit trade	1 773	1.5	37 447	3.4	21.1
Full service wholesale trade	89 914	76.1	730 190	66.4	8.1
"Direct - to - customer trading"	28 236	23.9	369 584	33.6	13.1
Total	**118 150**	**100.0**	**1 099 774**	**100.0**	**9.3**

Source: HGZ 1993.

Table D12: Distribution of wholesale and commission trade enterprises by number of local units, Germany (1993)

Activity	Enterprises	Number of local units		
		1	2 - 4	≥ 5
	Number	Share (%)		
Agricultural raw materials and food	**27 723**	**90.4**	**8.3**	**1.2**
Agricultural raw materials	9 401	91.8	6.9	1.3
Food, beverages and tobacco	18 322	89.7	9.1	1.2
Non-food household products	**37 396**	**91.6**	**7.6**	**0.8**
Textiles, clothing and footwear	7 346	90.4	8.8	0.8
Electrical household appliances, radio and television goods	7 356	89.9	8.7	1.4
Pharmaceutical goods	3 851	91.6	7.4	1.0
Other	18 843	92.8	6.7	0.5
Intermediate products and machinery	**50 079**	**90.1**	**8.8**	**1.1**
Non-agricultural intermediate products	26 724	89.5	9.3	1.2
Industrial machinery and equipment	23 355	90.7	8.3	1.0
Other wholesale	**2 952**	**91.8**	**6.6**	**1.5**
Total wholesale trade	**118 150**	**90.7**	**8.3**	**1.0**
Commission trade	**60 154**	**98.1**	**1.9**	**0.0**
Total	**178 304**	**93.2**	**6.1**	**0.7**

Source: HGZ 1993.

Table D13: Number of wholesale and commission trade enterprises by legal status, Germany (1993)

Activity	Enterprises	Legal status											
		Sole proprietorship		Partnership		Limited partnership		Private limited company		Joint stock company		Other	
	Number	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Wholesale trade	118 150	49 741	42.1	6 262	5.3	11 579	9.8	45 724	38.7	236	0.2	4 608	3.9
Commission trade	60 154	52 575	87.4	1 504	2.5	842	1.4	5 113	8.5	:	:	:	:
Total	**178 304**	**102 316**	**57.4**	**7 766**	**4.4**	**12 421**	**7.0**	**50 837**	**28.5**	:	:	:	:

Source: HGZ 1993, UST 1992.

Table D14: Geographical distribution of wholesale and commission trade, Germany (1993)

Regions	Enterprises		Local units [1]					
					Persons employed		Turnover (Mio DEM)	
	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Baden-Württemberg	21 979	12.3	24 076	12.4	201 603	13.1	126 002	11.3
Bavaria	33 169	18.6	35 689	18.4	261 122	16.9	163 222	14.6
Berlin	6 896	3.9	7 466	3.8	46 602	3.0	31 331	2.8
Brandenburg	2 472	1.4	3 045	1.6	20 987	1.4	10 258	0.9
Bremen	2 032	1.1	2 160	1.1	23 625	1.5	18 410	1.7
Hamburg	7 501	4.2	7 947	4.1	69 302	4.5	114 784	10.3
Hesse	13 935	7.8	15 035	7.7	144 689	9.4	113 491	10.2
Mecklenburg-Western Pomerania	2 214	1.2	2 822	1.5	18 628	1.2	8 696	0.8
Lower Saxony	16 600	9.3	18 146	9.3	145 731	9.4	98 112	8.8
North-Rhine-Westphalia	42 277	23.7	45 068	23.2	379 165	24.6	309 732	27.8
Rhineland-Palatinate	9 303	5.2	9 831	5.1	66 228	4.3	35 249	3.2
Saarland	2 200	1.2	2 347	1.2	19 143	1.2	11 383	1.0
Saxony	4 733	2.7	5 945	3.1	41 617	2.7	18 641	1.7
Saxony-Anhalt	2 622	1.5	3 275	1.7	22 546	1.5	10 334	0.9
Schleswig-Holstein	6 555	3.7	7 043	3.6	59 556	3.9	36 118	3.2
Thuringia	3 816	2.1	4 486	2.3	23 541	1.5	8 972	0.8
Former territory [2]	162 447	91.1	174 808	89.9	1 416 766	91.8	1 057 834	94.9
New Länder [3]	15 857	8.9	19 573	10.1	127 319	8.2	56 901	5.1
Total	**178 304**	**100.0**	**194 381**	**100.0**	**1 544 085**	**100.0**	**1 114 735**	**100.0**

[1] Covers only wholesale local units rather than all local units of wholesaling enterprises.
[2] Including Berlin.
[3] Without Berlin (East).
Source: HGZ 1993.

Table D15: Geographical distribution of wholesale and commission trade enterprises by activity, Germany (1993)

Regions	Wholesale trade							Commission trade
	Agricultural raw materials	Food, beverages and tobacco	Non-food products	Non-agricultural intermediate products	Industrial machinery and equipment	Other	Total	
Baden-Württemberg	923	1 742	4 850	3 196	3 055	331	14 097	7 882
Bavaria	2 343	2 956	7 557	4 148	4 272	486	21 762	11 407
Berlin	116	581	1 518	754	727	226	3 922	2 974
Brandenburg	82	312	393	578	275	31	1 671	801
Bremen	45	265	350	310	283	97	1 350	682
Hamburg	182	1 002	1 899	1 025	1 119	369	5 596	1 905
Hesse	604	1 440	3 610	1 944	2 121	176	9 895	4 040
Mecklenburg-Western Pomerania	75	233	255	342	395	20	1 320	894
Lower Saxony	1 867	1 858	2 940	2 360	1 772	348	11 145	5 455
North-Rhine-Westphalia	1 923	4 029	8 788	7 312	5 663	534	28 249	14 028
Rhineland-Palatinate	504	1 563	1 768	1 388	907	109	6 239	3 064
Saarland	57	324	388	415	278	21	1 483	717
Saxony	99	671	921	887	739	46	3 363	1 370
Saxony-Anhalt	81	303	357	546	445	21	1 753	869
Schleswig-Holstein	425	695	1 323	978	869	134	4 424	2 131
Thuringia	75	348	479	541	435	3	1 881	1 935
Former territory [1]	8 989	16 455	34 991	23 830	21 066	2 831	108 162	54 285
New Länder [2]	412	1 867	2 405	2 894	2 289	121	9 988	5 869
Total	**9 401**	**18 322**	**37 396**	**26 724**	**23 355**	**2 952**	**118 150**	**60 154**

[1] Including Berlin.
[2] Without Berlin (East).
Source: HGZ 1993.

Table D16: Geographical distribution of local units in wholesale and commission trade, Germany (1993)

Regions	Population		Area (Km²)		Local units		Local units per 10 000 inhabitants	Local units per 100 Km²
	Number	Share (%)	Number	Share (%)	Number	Share (%)		
Baden-Württemberg	10 148 708	12.5	35 751	10.0	24 076	12.4	23.7	67
Bavaria	11 770 257	14.5	70 547	19.8	35 689	18.4	30.3	51
Berlin	3 465 748	4.3	889	0.2	7 466	3.8	21.5	840
Brandenburg	2 542 651	3.1	29 481	8.3	3 045	1.6	12.0	10
Bremen	685 845	0.8	404	0.1	2 160	1.1	31.5	535
Hamburg	1 688 785	2.1	755	0.2	7 947	4.1	47.1	1 053
Hesse	5 922 639	7.3	21 114	5.9	15 035	7.7	25.4	71
Mecklenburg-Western Pomerania	1 864 980	2.3	23 169	6.5	2 822	1.5	15.1	12
Lower Saxony	7 577 520	9.4	47 606	13.3	18 146	9.3	23.9	38
North-Rhine-Westphalia	17 679 166	21.8	34 072	9.5	45 068	23.2	25.5	132
Rhineland-Palatinate	3 880 965	4.8	19 845	5.6	9 831	5.1	25.3	50
Saarland	1 084 007	1.3	2 570	0.7	2 347	1.2	21.7	91
Saxony	4 640 997	5.7	18 409	5.2	5 945	3.1	12.8	32
Saxony-Anhalt	2 796 981	3.5	20 446	5.7	3 275	1.7	11.7	16
Schleswig-Holstein	2 679 575	3.3	15 739	4.4	7 043	3.6	26.3	45
Thuringia	2 545 808	3.1	16 175	4.5	4 486	2.3	17.6	28
Former territory [1]	65 289 234	80.6	248 890	69.7	174 808	89.9	26.8	70
New Länder [2]	15 685 398	19.4	108 084	30.3	19 573	10.1	12.5	18
Total	**80 974 632**	**100.0**	**356 974**	**100.0**	**194 381**	**100.0**	**24.0**	**54**

[1] Including Berlin.
[2] Without Berlin (East).
Source: HG1Z 1993.

Table D17: Wholesale trade - investment in fixed assets, Germany (1994)

Activity	Investment in fixed assets					
	Total		Land and buildings		Vehicles, machinery and other equipment	
	Value (Mio DEM)	Share (%)	Value (Mio DEM)	Share (%)	Value (Mio DEM)	Share (%)
Agricultural raw materials and food	**3 037**	**23.7**	**785**	**20.2**	**2 251**	**25.2**
Agricultural raw materials	722	5.6	255	6.5	467	5.2
Food, beverages and tobacco	2 315	18.0	530	13.6	1 784	20.0
Non-food household products	**2 313**	**18.0**	**719**	**18.5**	**1 594**	**17.8**
Textiles, clothing and footwear	357	2.8	136	3.5	219	2.5
Electrical household appliances, radio and television goods	647	5.0	204	5.2	443	5.0
Pharmaceutical goods	359	2.8	87	2.2	271	3.0
Other	951	7.4	290	7.5	661	7.4
Intermediate products and machinery	**6 738**	**52.5**	**2 123**	**54.5**	**4 615**	**51.7**
Non-agricultural intermediate products	4 791	37.4	1 700	43.6	3 091	34.6
Industrial machinery and equipment	1 947	15.2	423	10.9	1 524	17.1
Other wholesale	**739**	**5.8**	**266**	**6.8**	**472**	**5.3**
Total	**12 826**	**100.0**	**3 895**	**100.0**	**8 931**	**100.0**

Source: Yearly sample survey in wholesale trade 1994.

Table D18: Structure of costs in selected branches of wholesale trade, Germany (1992)

Activity	Costs in % of net turnover									
	Total	Material	Labour	Rents	Advertising and travelling	Cars	Depreciation	Interest	Result [1]	Gross margin
Grain, seeds, plants, animal feeds, and live animals	99.2	88.9	4.7	0.3	0.3	0.8	1.0	0.8	0.8	11.1
Wood, building material and plumbing	97.6	78.9	9.3	0.9	0.6	1.2	1.4	1.3	2.4	21.1
Food, beverages and tobacco	99.3	88.6	5.2	0.6	0.6	0.6	0.8	0.5	0.7	11.4
Textiles, clothing, footwear and leather goods	97.2	76.7	8.1	1.4	1.7	0.5	0.9	1.8	2.8	23.3
Electrical products	97.3	76.8	11.2	1.7	1.0	0.5	0.8	0.9	2.7	23.2

[1] Gross ordinary surplus minus financial income.
Source: KST 1992.

Table D19: Turnover, gross margin, wages and salaries in wholesale trade by activity, Germany (1994)

Activity	Turnover	Gross margin		Wages and salaries	
		Value	Share of turnover	Value	Share of gross margin
	(Mio DEM)	(Mio DEM)	(%)	(Mio DEM)	(%)
Agricultural raw materials and food	**293 581**	**43 665**	**14.9**	**13 474**	**30.9**
Agricultural raw materials	62 123	8 708	14.0	2 550	29.3
Food, beverages and tobacco	231 458	34 957	15.1	10 924	31.2
Non-food household products	**223 768**	**55 014**	**24.6**	**17 696**	**32.2**
Textiles, clothing and footwear	34 235	9 251	27.0	2 548	27.5
Electrical household appliances, radio and television goods	61 488	13 074	21.3	4 707	36.0
Pharmaceutical goods	40 808	9 585	23.5	3 157	32.9
Other	87 236	23 104	26.5	7 284	31.5
Intermediate products and machinery	**474 435**	**88 878**	**18.7**	**30 741**	**34.6**
Non-agricultural intermediate products	355 731	59 310	16.7	19 160	32.3
Industrial machinery and equipment	118 704	29 568	24.9	11 581	39.2
Other wholesale	**67 993**	**8 092**	**11.9**	**3 278**	**40.5**
Total	**1 059 777**	**195 648**	**18.5**	**65 190**	**33.3**

Source: Yearly sample survey in wholesale trade 1994.

Table D20: Index numbers of turnover in wholesale trade by activity, Germany (1995 - 1996)

Activity	Turnover (1994 = 100)			
	In current prices		In prices of 1991	
	1995	1996	1995	1996
Agricultural raw materials and food	**101.0**	**103.3**	**:**	**:**
Agricultural raw materials	99.9	104.0	101.7	101.1
Food, beverages and tobacco	101.3	101.0	100.3	100.1
Non-food household products	**101.7**	**98.4**	**100.8**	**97.6**
Textiles, clothing and footwear	93.9	91.7	:	:
Electrical household appliances, radio and television goods	105.3	99.6	108.9	104.8
Pharmaceutical goods	104.7	108.0	103.1	104.5
Other	100.6	95.5	:	:
Intermediate products and machinery	**102.3**	**99.4**	**:**	**:**
Non-agricultural intermediate products	102.3	99.3	98.5	96.7
Industrial machinery and equipment	102.3	99.7	104.4	106.2
Other wholesale	**98.3**	**100.8**	**98.3**	**95.6**
Total	**101.6**	**99.9**	**100.0**	**99.1**

Source: Monthly sample survey in wholesale trade.

ESPAÑA

1. Introduction

The wholesale trade is a subject on which very few studies have been published. Any analysis of the trade is hampered by two basic factors: there is much of this type of trade that is not normally seen in operation and it is a sector which has aroused very little interest among researchers.

Most of the information available on wholesaling is on those enterprises which have a retailing outlet. That is, only the large chains which originated as wholesalers and which have also become associated with retailing, with well-known and popular brands, have aroused any attention.

Table E1 gives the principal data for the wholesale and commission trades in Spain for 1992. This chapter, which will concentrate on this group, will be the first study ever of commission trade in Spain.

2. The role of wholesale and commission trade in the Spanish economy

Compared with retailing, there are relatively few enterprises concerned with wholesaling in Spain. In 1992, there were 73 065 enterprises in wholesaling, 5.2% of the total number of enterprises in the country. A slightly larger proportion, 6.0%, of the total number of local units in the country were given over to wholesaling.

4.8% of the working population were employed in the wholesaling sector, which contributed 3.9% to gross production value and 4.1% to value added at market prices. Wholesaling enterprises invested a total of ESP 451 billion.

3. Analysis of wholesale trade in Spain

The data for this study refer to 1992. Data for 1988 are available, but they are aggregated into different groupings of activity and it is therefore not possible to make valid comparisons with the earlier year.

An analysis of the wholesale trade may be tackled in the following ways.

3.1. Functional distribution

The product mix supplied by a wholesaler is the main criterion for classifying this type of trade. Foodstuffs are the core of trading activity. In 1992 there were 23 224 enterprises dealing in food, beverage and tobacco, that is 31.8% of all wholesaling enterprises: an increase in the number of such enterprises by 17% compared with the 1990 figure. The second major category were enterprises trading in non-agricultural intermediate products, with 20.8% of the total.

A further aspect illustrating changes in wholesaling is the number of local units. The data on these confirm the relative stability of this type of trade, with a moderate increase of only 6% between 1990 and 1992. The majority of premises, like enterprises, concentrate on food, beverages and tobacco (30.9%): in any given part of the trade, percentage changes in both enterprises and outlets are very similar.

3.2. Geographical distribution

The geographical distribution of the trade may be studied using the results of the 1992 Internal Trade Survey. This table shows the distribution by main activity of wholesale-trade enterprises in the Autonomous Communities compared with the distribution in the country as a whole. Cataluña has the largest number of wholesaling enterprises, with 14 811, 20.3% of the total, followed by Andalucía (10 325 enterprises or 14.1%). In Andalucía there is an above-average level of wholesaling in foodstuffs.

In general, Cataluña, Communidad Valenciana and Madrid have an above-average percentage of wholesaling enterprises in all types of non-food consumer goods. That is, the regions with the most highly developed economies are those which offer the most favourable conditions for non-food wholesaling.

3.3. The wholesaling enterprise in Spain

The latest developments and tendencies suggest that wholesaling enterprises are threatened by movements, in both directions of the distribution chain, of both manufacturers and retailers, who are trying to bypass the wholesaling link to some extent or indeed even altogether. One approach is by manufacturers who try to make sure they keep as firm a foothold as possible in the chain by absorbing the wholesaling link and turning their own network of warehouses into 'relay stations' (that is, distribution centres). They may buy wholesaling enterprises, contract out distributive services to specialists in logistics or set up direct links with retailers.

On the other hand, the major retailers are creating their own distribution networks to control and organise all aspects of getting supplies to their outlets and are also reducing purchasing costs by dealing directly with manufacturers. Moreover, small retailers are tending to form associations - cooperatives, purchasing groups - to cut out the wholesaling link.

Faced with this situation, wholesaling enterprises have taken up new activities and services, thus extending their field of operation. For a long time, the view has been held that one of the reasons why wholesalers seem gradually to have been pushed into the background was that their functions could easily be taken over by manufacturers or retailers at very similar costs to those of the strictly wholesaling enterprises, or possibly more cheaply.

In addition, they have been adding new activities to their main one: in 1992, 20% of wholesaling enterprises classified as such by their main branch of activity had a secondary activity, 84% of them in the commercial field.

4. Wholesaling enterprises and legal status

The most common type of legal status for wholesaling enterprises is the sole proprietorship (37.1%), followed by public limited companies (28.1%) and private limited companies (26.6%), with partnerships, limited partnerships and joint ownership together accounting for 3.9%.

5. Wholesaling links

There do not appear to be very many associations within the wholesale trade, but the growing number of links between wholesaling and other enterprises both within and outside the sector is one of the most important changes within the trade.

There are two types of link in wholesaling: vertical and horizontal. 'Vertical' links refer to relationships established by wholesaling enterprises in the form of contracts with, or ownership of, other elements in the distribution chain - manufacturers, wholesalers working at other stages in the process and retailers - rather than simple relationships with suppliers or customers. The result of this kind of link-up - indeed, its raison d'être - is normally competition between wholesalers themselves.

'Horizontal' links connect wholesaling enterprises one with another with a view to various types of cooperation between enterprises with two different spheres of influence: associations enabling enterprises to get together to deal with suppliers (purchasing groups) or formed to sell their own products on the retail market or to the consumer (formation of groups and chains).

Tables E7, E8 and E9 give data on wholesaling enterprises alone, excluding commission trade, since the latter does not include any purchasing/selling function.

Table E7 shows that the great majority of enterprises - 92% - buy their products independently. Only 8% are part of any association.

Table E8 gives the distribution of wholesaling enterprises broken down by type of sales organisation and by main activity. The great majority (94%) are independent, with an insignificant percentage in any given type of association.

In order to analyse wholesaling enterprises' supply policies, we also studied the type of supplier used. National suppliers, or suppliers based in Spain, form the majority - about four-fifths - but approaching a fifth of wholesalers maintain direct trading links with foreign suppliers, the majority of them concentrating on the wholesale of interindustrial goods and on the miscellaneous "other goods" category (group 51.7 of NACE Rev. 1).

6. Size of wholesaling enterprises

6.1. Turnover

Turnover may be used as a primary indicator of the size of wholesaling enterprises. In 1992, their total turnover in Spain was ESP 16 500 billion. Of this total 34% was accounted for by sales of wholesaling enterprises marketing food products. The average turnover of all enterprises was ESP 226 million, with a maximum in activity in the other goods wholesale category (ESP 352 million).

These data on turnover show how small the average wholesaling enterprise is. A similar view of turnover is presented in Table E16, which shows that of course most enterprises do not achieve even these low average values.

The largest share of turnover (94%) derives from activities which are wholesaling in the strict sense (as opposed to commission trade).

49.2% of the total turnover of wholesaling enterprises is accounted for by those who either import or export. Table E19 shows all exports and imports by origin and destination in a breakdown by main activity in 1992. For both imports and exports, there are separate figures for the European Union and the rest of the world, those for the European Union being higher.

6.2. Plant and equipment

A second indication of the size of wholesaling enterprises is the plant and equipment used in the course of their business. Most of them (75.0%) operate at only one location and only 4.6% were operating at more than four sites. This figure is further evidence of the typically small size of enterprises.

The number of sites is another aspect of geographical distribution. The fact that less than 5% of enterprises were operating at more than four different locations in 1992 shows that the great majority have what might be termed a local market.

Table E10 shows the different uses of the premises of wholesaling enterprises by main activity. Most are for commercial use - selling and contract work - (81%), but doubling as warehouses (62%) and administrative offices (31%). All possible uses of premises have been studied, since some may be used for more than one purpose.

The role of machinery and equipment may be studied on the basis of the enterprises' investment. Investment activity is one of the basic factors contributing to the reform of commercial structures. In 1992, only 35% of wholesaling enterprises contributed to the total investment of ESP 451 billion.

Investments may be used for many different purposes: alterations to premises, extensions, equipment, vehicles, etc. The main investments were for capital goods (63%).

Table E18 shows the importance of self-financing or use of the businesses' own funds, at 63%, in the financing of investment, followed by external financing from private banks, savings banks, etc.

6.3. Employment

The number of persons employed in a given enterprise is another aspect covered by our study of the characteristics of wholesaling enterprises. In 1992, 590 734 persons were employed in the sector, a 0.9% drop since 1990. The largest percentage (33.8%) was employed in enterprises marketing foodstuffs. On average, enterprises employed eight people, and thus the average enterprise in this sector is relatively small, with noticeably higher figures only for 'other wholesale' (11.5 persons employed) and lower ones for wholesale of agricultural raw materials (4.8 persons employed). Of the total of 590 734 persons employed, 90.7% were paid employees and only 9.3% self-employed: 42 794 persons worked on commission in this type of trade.

The percentage of paid employees varies from one sector to another. There are fewest in enterprises marketing agricultural raw materials (79.8% of the total number of persons employed in the sector) whereas, at the other end of the scale, 94.2% of those in the wholesale trade of industrial machinery and equipment are paid employees.

An analysis of paid employees by hours worked and sex shows that 95.1% of paid employees work full-time and 4.9% part-time. 141 186 employees or 26.4% of the total (part-time and full-time) are women.

Table E14 gives a further slant on employment in wholesaling. This shows the distribution of wholesaling enterprises by number of persons employed in 1992. Only 19% of enterprises employed more than ten persons, the highest percentage being 29% for the category from five to nine employees. Only 1.5% of total wholesaling enterprises had more than 50 employees.

Table E1: Key statistics for wholesale and commission trade, Spain (1992)

	Value	Share (%)
Number of enterprises	73 065	
Number of local units	105 185	
Number of persons employed	590 734	100.0
Employees	535 525	90.7
Full-time employees	509 213	95.1
Women	125 368	24.6
Part-time employees	26 312	4.9
Women	15 818	60.1
Self-employed	55 209	9.3
Turnover (Mio ESP)	**16 532 075**	
Turnover per person employed (Mio ESP)	27.98	
Gross production (GP) (Mio ESP)	**3 946 888**	
GP as % of turnover		23.9
Intermediate consumption (Mio ESP)	**1 526 974**	
as % of GP		38.7
Gross value added at market prices (Mio ESP)	**2 419 914**	
as % of GP		61.3
Gross value added per person employed (Mio ESP)	4.09	
Personnel costs (Mio ESP)	**1 454 579**	
% of gross value added		60.1
Personnel costs per person employed (Mio ESP)	2.46	
Total fixed capital investment (Mio ESP)	**450 655**	
Buildings (Mio ESP)	129 603	28.8
Equipment (Mio ESP)	282 086	62.6
Fixed capital investment per person employed (Mio ESP)	0.76	

Source: ECI: Survey of Internal Trade, 1992.

Table E2: The role of wholesale and commission trade in the Spanish economy (1992)

	Total economy	Wholesale trade [5]	Wholesale trade (%)
Number of enterprises	1 398 057 [1]	73 065	5.2
Number of local units	1 760 254 [1]	105 185	6.0
Number of persons employed [2]	**12 366 000**	**590 734**	**4.8**
Employees	9 076 000	535 525	5.9
Women	3 014 000	141 186	4.7
Self-employed	3 290 000	55 209	1.7
Gross production (GP) [3] (Mio ESP)	**100 362 000**	**3 946 888**	**3.9**
Intermediate consumption (Mio ESP)	**41 084 419**	**1 526 974**	**3.7**
as % of GP	40.9	38.7	
Gross value added at market prices (Mio ESP)	**59 002 108**	**2 419 914**	**4.1**
Personnel costs (%) [4]	46.6	60.1	
Gross value added per person employed (Mio ESP)	4.77	4.09	
Total fixed capital investment (Mio ESP)	**:**	**450 655**	**:**
Buildings (Mio ESP)	:	129 603	:
Equipment (Mio ESP)	:	282 086	:
Fixed capital investment per person employed (Mio ESP)	:	0.76	:

Source: [1] 1990 Census of premises.
[2] 1992 Survey of the Working.
[3] National accounts.
[4] Includes only compensation of employees.
[5] (ECI 92) 1992 Survey of Internal Trade.

Table E3: Number of enterprises and local units in wholesale and commission trade by activity, Spain (1992)

Activity	Enterprises		Local units	
	Number	Share (%)	Number	Share (%)
Agricultural raw materials and food	**27 734**	**38.0**	**38 973**	**37.1**
Agricultural raw materials	4 510	6.2	6 422	6.1
Food, beverages and tobacco	23 224	31.8	32 551	30.9
Non-food household products	**13 997**	**19.2**	**21 868**	**20.8**
Intermediate products and machinery	**26 837**	**36.7**	**38 992**	**37.1**
Non-agricultural intermediate products	15 214	20.8	21 889	20.8
Industrial machinery and equipment	11 623	15.9	17 103	16.3
Other wholesale	**1 014**	**1.4**	**1 586**	**1.5**
Total wholesale trade	**69 582**	**95.2**	**101 419**	**96.4**
Commission trade	**3 483**	**4.8**	**3 766**	**3.6**
Total	**73 065**	**100.0**	**105 185**	**100.0**

Source: ECI 1992 (INE).

Table E4: Distribution of wholesale and commission trade enterprises by number of local units, Spain (1992)

Activity	Enterprises	Local units			
		1	2	3	≥4
	Number	Share (%)			
Agricultural raw materials and food	**27 734**	**74.6**	**16.7**	**5.5**	**3.3**
Agricultural raw materials	4 510	73.7	15.4	7.6	3.3
Food, beverages and tobacco	23 224	74.8	16.9	5.0	3.3
Non-food household products	**13 997**	**72.2**	**16.7**	**3.7**	**7.4**
Intermediate products and machinery	**26 837**	**74.5**	**17.2**	**3.3**	**5.0**
Non-agricultural intermediate products	15 214	74.1	17.1	3.3	5.5
Industrial machinery and equipment	11 623	75.1	17.3	3.4	4.2
Other wholesale	**1 014**	**70.1**	**20.2**	**4.7**	**4.9**
Commission trade	**3 483**	**92.8**	**6.3**	**0.7**	**0.1**
Total	**73 065**	**74.9**	**16.4**	**4.1**	**4.6**

Source: ECI 1992 (INE).

Table E5: Number of wholesale and commission trade enterprises by secondary activity, Spain (1992)

Activity	Enterprises	Without secondary activity	With secondary activity [1]		
				With commercial activity	With non-commercial activity
	Number	Number	Number		
Agricultural raw materials and food	**27 734**	**20 350**	**7 384**	**6 319**	**1 450**
Agricultural raw materials	4 510	2 839	1 671	1 430	329
Food, beverages and tobacco	23 224	17 511	5 713	4 889	1 121
Non-food household products	**13 997**	**11 153**	**2 844**	**2 569**	**325**
Intermediate products and machinery	**26 837**	**22 590**	**4 247**	**3 292**	**1 050**
Non-agricultural intermediate products	15 214	12 302	2 912	2 418	570
Industrial machinery and equipment	11 623	10 288	1 335	874	480
Other wholesale	**1 014**	**738**	**276**	**215**	**63**
Commission trade	**3 483**	**3 303**	**180**	**134**	**54**
Total	**73 065**	**58 134**	**14 931**	**12 529**	**2 942**

[1] Enterprises may be classified as both with commercial activity and with non-commercial activity.
Source: ECI 1992 (INE).

Table E6: Number of wholesale and commission trade enterprises by legal status, Spain (1992)

Activity	Enterprises	Legal status									
		Sole proprietorship		Public limited company		Private limited company		Partnership, limited partnership and joint ownership		Cooperatives, foundations and others	
	Number	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Agricultural raw materials and food	**27 734**	**12 919**	**46.6**	**5 068**	**18.3**	**6 666**	**24.0**	**1 213**	**4.4**	**1 868**	**6.7**
Agricultural raw materials	4 510	2 218	49.2	444	9.8	1 069	23.7	199	4.4	580	12.9
Food, beverages and tobacco	23 224	10 701	46.1	4 624	19.9	5 597	24.1	1 014	4.4	1 288	5.5
Non-food household products	**13 997**	**4 215**	**30.1**	**5 435**	**38.8**	**3 710**	**26.5**	**387**	**2.8**	**250**	**1.8**
Intermediate products and machinery	**26 837**	**7 636**	**28.5**	**9 275**	**34.6**	**8 015**	**29.9**	**1 063**	**4.0**	**848**	**3.2**
Non-agricultural intermediate products	15 214	5 236	34.4	4 220	27.7	4 505	29.6	614	4.0	639	4.2
Industrial machinery and equipment	11 623	2 400	20.6	5 055	43.5	3 510	30.2	449	3.9	209	1.8
Other wholesale	**1 014**	**291**	**28.7**	**310**	**30.6**	**302**	**29.8**	**70**	**6.9**	**41**	**4.0**
Commission trade	**3 483**	**2 066**	**59.3**	**462**	**13.3**	**722**	**20.7**	**112**	**3.2**	**121**	**3.5**
Total	73 065	27 127	37.1	20 550	28.1	19 415	26.6	2 845	3.9	3 128	4.3

Source: ECI 1992 (INE).

Table E7: Enterprises by type of purchasing organization and by activity, Spain (1992)

Activity	Enterprises [1]	Type of purchasing organisation			
		Independent enterprises		Chain enterprises	
	Number	Number	Share (%)	Number	Share (%)
Agricultural raw materials and food	**27 734**	**25 046**	**90.3**	**2 688**	**9.7**
Agricultural raw materials	4 510	3 848	85.3	662	14.7
Food, beverages and tobacco	23 224	21 198	91.3	2 026	8.7
Non-food household products	**13 997**	**13 151**	**94.0**	**846**	**6.0**
Intermediate products and machinery	**26 837**	**25 227**	**94.0**	**1 610**	**6.0**
Non-agricultural intermediate products	15 214	14 533	95.5	681	4.5
Industrial machinery and equipment	11 623	10 694	92.0	929	8.0
Other wholesale	**1 014**	**884**	**87.2**	**130**	**12.8**
Total	**69 582**	**64 308**	**92.4**	**5 274**	**7.6**

[1] Excluding commission trade.
Source: ECI 1992 (INE).

Table E8: Distribution of wholesaling enterprises by type of sales organization and by activity, Spain (1992)

Activity	Enterprises [1]	Type of sales organization (%) [2]					
	Number	Independent enterprises	Chain - subsidiaries	Voluntary chain	Wholesalers' central purchasing organisation	Wholesalers' purchasing group	Cooperative of wholesalers and others
Agricultural raw materials and food	**27 734**	**93.1**	**0.7**	**1.1**	**1.9**	**0.9**	**3.1**
Agricultural raw materials	4 510	91.0	0.7	0.9	2.2	0.1	5.2
Food, beverages and tobacco	23 224	93.5	0.7	1.1	1.8	1.0	2.6
Non-food household products	**13 997**	**96.4**	**0.2**	**0.9**	**1.4**	**0.6**	**0.7**
Intermediate products and machinery	**26 837**	**94.7**	**0.5**	**1.0**	**2.4**	**2.8**	**3.4**
Non-agricultural intermediate products	15 214	93.5	0.1	1.1	4.1	4.3	4.5
Industrial machinery and equipment	11 623	96.3	0.9	0.8	0.2	1.0	1.9
Other wholesale	**1 014**	**97.7**	**1.3**	**0.4**			**0.6**
Total	**69 582**	**94.3**	**0.5**	**1.0**	**2.0**	**1.6**	**2.7**

[1] Excluding commission trade.
[2] Enterprises may be classified to more than one type of sales organization.
Source: ECI 1992 (INE).

Table E9: Distribution of wholesaling enterprises by main suppliers and by activity, Spain (1992)

Activity	Enterprises [1]	Type of supplier [2]			
		Enterprises established abroad		National manufacturers or producers	
	Number	Number	Share (%)	Number	Share (%)
Agricultural raw materials and food	**27 734**	**1 929**	**7.0**	**21 792**	**78.6**
Agricultural raw materials	4 510	398	8.8	3 608	80.0
Food, beverages and tobacco	23 224	1 531	6.6	18 184	78.3
Non-food household products	**13 997**	**3 498**	**25.0**	**11 400**	**81.5**
Intermediate products and machinery	**26 837**	**5 889**	**21.9**	**22 731**	**84.7**
Non-agricultural intermediate products	15 214	2 534	16.7	13 607	89.4
Industrial machinery and equipment	11 623	3 355	28.9	9 124	78.5
Other wholesale	**1 014**	**344**	**33.9**	**786**	**77.5**
Total	**69 582**	**11 660**	**16.8**	**56 709**	**81.5**

[1] Excluding commission trade.
[2] A small number of enterprises are not classified to a type of supplier.
Source: ECI 1992 (INE).

Table E10: Distribution of local units of wholesale and commission trade enterprises by purpose, Spain (1992)

Activity	Local units	Purpose of premises [1]						
		Retailing establishment	Contract work and sales office	Workshop	Manufacturing	Administration	Warehouse	Other
	Number	Share (%)						
Agricultural raw materials and food	**38 973**	**16.9**	**80.6**	**0.4**	**3.3**	**23.6**	**70.3**	**6.1**
Agricultural raw materials	6 422	11.3	78.2	0.4	3.7	24.0	77.0	6.4
Food, beverages and tobacco	32 551	18.0	81.1	0.4	3.2	23.5	69.0	6.0
Non-food household products	**21 868**	**18.4**	**75.6**	**2.5**	**1.5**	**31.8**	**50.8**	**7.0**
Intermediate products and machinery	**38 992**	**6.5**	**84.2**	**8.9**	**1.4**	**36.0**	**64.3**	**6.9**
Non-agricultural intermediate products	21 889	7.4	83.2	2.8	1.4	33.5	72.3	6.6
Industrial machinery and equipment	17 103	5.5	85.6	16.7	1.5	39.3	54.0	7.1
Other wholesale	**1 586**	**1.2**	**83.9**	**6.5**	**2.4**	**35.0**	**58.3**	**6.9**
Commission trade	**3 766**	**1.6**	**93.5**	**0.5**	**0.0**	**41.4**	**21.1**	**17.7**
Total	105 185	12.6	81.4	4.1	2.1	30.7	62.1	7.0

[1] Local units may be classified to more than one purpose.
Source: ECI 1992 (INE).

Table E11: Employment in wholesale and commission trade enterprises, Spain (1992)

Activity	Enterprises	Persons employed		Average number of persons employed per enterprise
	Number	Number	Share (%)	(%)
Agricultural materials and food	**27 734**	**221 239**	**37.5**	**7.9**
Agricultural raw materials	4 510	21 799	3.7	4.8
Food, beverages and tobacco	23 224	199 440	33.8	8.5
Non-food household products	**13 997**	**126 679**	**21.4**	**9.0**
Intermediate products and machinery	**26 837**	**220 352**	**37.3**	**8.2**
Non-agricultural intermediate products	15 214	117 004	19.8	7.6
Industrial machinery and equipment	11 623	103 348	17.5	8.8
Other wholesale	**1 014**	**11 670**	**2.0**	**11.5**
Commission trade	**3 483**	**10 794**	**1.8**	**3.1**
Total	**73 065**	**590 734**	**100.0**	**8.0**

Source: ECI 1992 (INE).

Table E12: Characteristics of employment in wholesale and commission trade, Spain (1992)

Activity	Persons employed		Paid			Unpaid		
			Total	Permanent staff	Casual staff	Total	Owners	Family helpers
	Number	Share (%)	Number	Number	Number	Number	Number	Number
Agricultural raw materials and food	**221 239**	**37.5**	**195 961**	**115 738**	**80 223**	**25 278**	**19 877**	**5 401**
Agricultural raw materials	21 799	3.7	17 401	12 779	4 622	4 398	3 450	948
Food, beverages and tobacco	199 440	33.8	178 560	102 959	75 601	20 880	16 427	4 453
Non-food household products	**126 679**	**21.4**	**118 237**	**90 500**	**27 737**	**8 442**	**7 418**	**1 024**
Intermediate products and machinery	**220 352**	**37.3**	**202 542**	**159 633**	**42 909**	**17 810**	**14 416**	**3 394**
Non-agricultural intermediate products	117 004	19.8	105 232	80 547	24 685	11 772	9 202	2 570
Industrial machinery and equipment	103 348	17.5	97 310	79 086	18 224	6 038	5 214	824
Other wholesale	**11 670**	**2.0**	**10 858**	**7 768**	**3 090**	**812**	**709**	**103**
Commission trade	**10 794**	**1.8**	**7 927**	**6 579**	**1 348**	**2 867**	**2 650**	**217**
Total	**590 734**	**100.0**	**535 525**	**380 218**	**155 307**	**55 209**	**45 070**	**10 139**

Source: ECI 1992 (INE).

Table E13: Employees by full-time/part-time and sex in wholesale and commission trade, Spain (1992)

Activity	Total employees		Permanent paid staff				Casual paid staff			
			Full-time		Part-time		Full-time		Part-time	
	Number	Share (%)	Women	Men	Women	Men	Women	Men	Women	Men
Agricultural raw materials and food	195 961	36.6	22 275	89 922	1 859	1 682	27 570	42 390	6 426	3 837
Agricultural raw materials	17 401	3.2	2 118	10 378	160	123	1 446	2 897	133	146
Food, beverages and tobacco	178 560	33.3	20 157	79 544	1 699	1 559	26 124	39 493	6 293	3 691
Non-food household products	118 237	22.1	24 461	62 881	1 993	1 165	9 747	16 844	794	352
Intermediate products and machinery	202 542	37.8	29 062	126 326	2 277	1 970	7 399	33 071	1 661	776
Non-agricultural intermediate products	105 232	19.7	13 418	64 766	1 257	1 107	3 391	19 729	1 187	377
Industrial machinery and equipment	97 310	18.2	15 644	61 560	1 020	863	4 008	13 342	474	399
Other wholesale	10 858	2.0	1 897	5 526	125	220	728	1 786	337	239
Commission trade	7 927	1.5	1 818	4 328	277	155	411	771	69	98
Total	535 525	100.0	79 513	288 983	6 531	5 192	45 855	94 862	9 287	5 302

Source: ECI 1992 (INE).

Table E14: Distribution of wholesale and commission trade enterprises by employment bands, Spain (1992)

Activity	Enterprises	Number of persons employed [1]						
		0-1	2	3-4	5-9	10-19	20-49	≥50
	Number	Share (%)						
Agricultural raw materials and food	27 734	16.0	16.5	20.2	29.2	12.0	4.3	1.8
Agricultural raw materials	4 510	23.2	22.0	21.1	25.9	5.5	1.7	0.7
Food, beverages and tobacco	23 224	14.6	15.4	20.0	29.8	13.3	4.8	2.0
Non-food household products	13 997	8.2	14.8	27.9	23.6	18.4	5.4	1.7
Intermediate products and machinery	26 837	8.5	15.5	23.5	33.7	12.6	5.2	1.1
Non-agricultural intermediate products	15 214	9.5	17.2	22.2	35.0	10.4	4.8	0.9
Industrial machinery and equipment	11 623	7.1	13.3	25.1	31.9	15.5	5.6	1.4
Other wholesale	1 014	9.9	15.9	19.1	26.5	19.2	6.2	3.2
Commission trade	3 483	38.7	23.6	18.5	15.3	2.7	1.1	0.0
Total	73 065	12.8	16.1	22.8	29.1	13.1	4.7	1.5

[1] On 30 september 1992.
Source: ECI 1992 (INE).

Table E15: Turnover of wholesale and commission trade enterprises by sector of activity, Spain (1992)

Activity	Enterprises	Turnover		
	Number	Value (Mio ESP)	Share (%)	Average turnover per enterprises (Mio ESP)
Agricultural raw materials and food	**27 734**	**6 713 309**	**40.6**	**242**
Agricultural raw materials	4 510	1 038 369	6.3	230
Food, beverages and tobacco	23 224	5 674 940	34.3	244
Non-food household products	**13 997**	**3 895 510**	**23.6**	**278**
Intermediate products and machinery	**26 837**	**5 475 712**	**33.1**	**204**
Non-agricultural intermediate products	15 214	3 221 355	19.5	212
Industrial machinery and equipment	11 623	2 254 357	13.6	194
Other wholesale	**1 014**	**357 145**	**2.2**	**352**
Commission trade	**3 483**	**90 399**	**0.5**	**26**
Total	**73 065**	**16 532 075**	**100.0**	**226**

Source: ECI 1992 (INE).

Table E16: Concentration by turnover bands, wholesale and commission trade, Spain (1992)

Activity	Enterprises	Turnover bands (Mio ESP)						
		<10	10-19	20-49	50-99	100-299	300-499	≥500
	Number	Share (%)						
Agricultural raw materials and food	**27 734**	**8.3**	**8.8**	**20.1**	**20.8**	**25.6**	**7.8**	**8.7**
Agricultural raw materials	4 510	13.0	13.2	17.0	24.1	18.9	5.1	8.8
Food, beverages and tobacco	23 224	7.4	7.9	20.6	20.1	27.0	8.3	8.7
Non-food household products	**13 997**	**7.2**	**9.0**	**18.2**	**25.2**	**24.0**	**6.4**	**9.9**
Intermediate products and machinery	**26 837**	**6.6**	**8.9**	**22.5**	**20.8**	**29.6**	**5.7**	**6.0**
Non-agricultural intermediate products	15 214	7.8	8.3	21.0	20.9	31.1	5.4	5.6
Industrial machinery and equipment	11 623	5.1	9.8	24.5	20.6	27.6	6.1	6.4
Other wholesale	**1 014**	**8.1**	**8.4**	**14.5**	**24.9**	**28.8**	**6.7**	**8.6**
Commission trade	**3 483**	**48.5**	**20.2**	**21.4**	**6.1**	**2.9**	**0.6**	**0.3**
Total	**73 065**	**9.4**	**9.4**	**20.6**	**21.0**	**25.7**	**6.4**	**7.5**

Source: ECI 1992 (INE).

Table E17: Turnover of wholesale and commission trade enterprises by type of activity, Spain (1992)

Activity	Turnover	Type of activity						
		Wholesaling	Retailing	Wholesale on a fee or contract basis	Sales of manufactured merchandise	Repairs	Other services	Other
	Value (Mio ESP)	Share (%)						
Agricultural raw materials and food	**6 713 309**	**95.1**	**2.9**	**0.4**	**0.6**	**0.0**	**0.4**	**0.6**
Agricultural raw materials	1 038 369	95.2	2.3	0.3	1.2	0.0	0.6	0.5
Food, beverages and tobacco	5 674 940	95.1	3.0	0.4	0.5	0.0	0.4	0.6
Non-food household products	**3 895 510**	**94.4**	**3.2**	**0.1**	**0.7**	**0.2**	**0.5**	**1.0**
Intermediate products and machinery	**5 475 712**	**94.1**	**1.2**	**0.4**	**1.4**	**1.2**	**1.1**	**0.7**
Non-agricultural intermediate products	3 221 355	95.2	1.8	0.3	1.4	0.1	0.6	0.7
Industrial machinery and equipment	2 254 357	92.5	0.4	0.4	1.4	2.8	1.7	0.8
Other wholesale	**357 145**	**95.8**	**0.4**	**1.1**	**1.1**	**0.6**	**0.4**	**0.7**
Commission trade	**90 399**	**4.7**	**0.4**	**91.8**	**0.5**	**0.3**	**1.0**	**1.4**
Total	**16 532 075**	**94.2**	**2.3**	**0.8**	**0.9**	**0.5**	**0.6**	**0.7**

Source: ECI 1992 (INE).

Table E18: Wholesale and commission trade enterprises which have invested during the year, by source of financing, Spain (1992)

Activity	Enterprises which have invested	Sources of financing [1]		
		Self-financing	Banks	Other
	Number	Share (%)	Share (%)	Share (%)
Agricultural raw materials and food	**8 762**	**61.0**	**61.2**	**2.7**
Agricultural raw materials	1 678	51.5	69.8	1.1
Food, beverages and tobacco	7 084	63.3	59.2	3.0
Non-food household products	**5 307**	**65.9**	**57.6**	**3.1**
Intermediate products and machinery	**9 995**	**61.6**	**62.7**	**2.6**
Non-agricultural intermediate products	5 486	67.0	58.9	3.3
Industrial machinery and equipment	4 509	55.0	67.4	1.9
Other wholesale	**451**	**77.3**	**59.8**	**9.4**
Commission trade	**836**	**82.7**	**30.9**	**1.6**
Total	**25 351**	**63.2**	**60.0**	**2.8**

[1] Enterprises may be classified to more than one source of financing.
Source: ECI 1992 (INE).

Table E19: Exports and imports by destination and origin and by activity, Spain (1992)

Activity	Exports (Mio ESP)			Imports (Mio ESP)			Total turnover of enterprises that either export or import
	Total	To European Community [1]	To rest of world	Total	From European Community	From rest of world	Value (Mio ESP)
Agricultural raw materials and food	**436 920**	**350 780**	**86 140**	**791 661**	**562 419**	**229 243**	**2 793 535**
Agricultural raw materials	38 267	22 209	16 058	161 143	65 443	95 700	454 310
Food, beverages and tobacco	398 653	328 571	70 082	630 518	496 976	133 543	2 339 225
Non-food household products	**130 610**	**43 438**	**87 172**	**614 474**	**284 819**	**329 655**	**2 088 498**
Intermediate products and machinery	**177 599**	**99 916**	**77 684**	**915 136**	**627 335**	**287 801**	**3 030 162**
Non-agricultural intermediate products	80 740	57 553	23 188	451 196	292 233	158 963	1 651 845
Industrial machinery and equipment	96 859	42 363	54 496	463 940	335 102	128 838	1 378 317
Other wholesale	**27 630**	**4 943**	**22 687**	**51 690**	**32 589**	**19 102**	**208 286**
Commission trade	**2 340**	**912**	**1 428**	**1 169**	**965**	**203**	**11 777**
Total	**775 099**	**499 989**	**275 111**	**2 374 130**	**1 508 127**	**866 004**	**8 132 258**

[1] As defined by membership in 1992.
Source: ECI 1992 (INE).

Table E20: Investment of wholesale and commission trade enterprises by activity, Spain (1992)

Activity	Enterprises which have invested	Acquisitions and major repairs	Disposals	Net - investment
	Number	(Mio ESP)	(Mio ESP)	(Mio ESP)
Agricultural raw materials and food	**8 762**	**228 436**	**9 523**	**218 913**
Agricultural raw materials	1 678	24 691	1 441	23 250
Food, beverages and tobacco	7 084	203 745	8 082	195 663
Non-food household products	**5 307**	**101 384**	**9 563**	**91 821**
Intermediate products and machinery	**9 995**	**148 706**	**21 006**	**127 700**
Non-agricultural intermediate products	5 486	65 094	7 027	58 067
Industrial machinery and equipment	4 509	83 612	13 979	69 633
Other wholesale	**451**	**10 103**	**743**	**9 360**
Commission trade	**836**	**3 169**	**308**	**2 861**
Total	**25 351**	**491 798**	**41 143**	**450 655**

Source: ECI 1992 (INE).

Table E21: Net fixed capital investment of wholesale and commission trade enterprises, Spain (1992)

Activity	Total investment	Land		Buildings		Equipment	
	Value (Mio ESP)	Value (Mio ESP)	Share (%)	Value (Mio ESP)	Share (%)	Value (Mio ESP)	Share (%)
Agricultural raw materials and food	**218 913**	**23 281**	**10.6**	**50 413**	**23.0**	**145 219**	**66.3**
Agricultural raw materials	23 250	1 296	5.6	7 694	33.1	14 260	61.3
Food, beverages and tobacco	195 663	21 985	11.2	42 719	21.8	130 959	66.9
Non-food household products	**91 821**	**3 537**	**3.9**	**16 600**	**18.1**	**71 684**	**78.1**
Intermediate products and machinery	**127 700**	**9 595**	**7.5**	**58 717**	**46.0**	**59 388**	**46.5**
Non-agricultural intermediate products	58 067	6 023	10.4	20 225	34.8	31 819	54.8
Industrial machinery and equipment	69 633	3 572	5.1	38 492	55.3	27 569	39.6
Other wholesale	**9 360**	**1 895**	**20.3**	**3 283**	**35.1**	**4 182**	**44.7**
Commission trade	**2 861**	**658**	**23.0**	**590**	**20.6**	**1 613**	**56.4**
Total	**450 655**	**38 966**	**8.7**	**129 603**	**28.8**	**282 086**	**62.6**

Source: ECI 1992 (INE).

Table E22: Geographical distribution of wholesale trade enterprises by activity, Spain (1992)

Autonomous Community	Total	Share (%)	Agricultural raw materials	Food, beverages and tobacco	Non-food products	Non-agricultural intermediate products	Industrial machinery and equipment	Other	Commission trade
Andalucia	10 325	14.1	600	4 179	1 473	2 492	1 028	141	412
Aragon	2 471	3.4	276	592	441	595	459	5	103
Asturias	1 867	2.6	102	488	519	409	264	24	61
Baleares	1 397	1.9	39	488	194	263	333	6	74
Canarias	2 455	3.4	50	1 195	603	159	302	65	81
Cantabria	710	1.0	89	272	56	119	137	5	32
Castilla-La Mancha	2 752	3.8	379	869	277	891	277	18	41
Castilla-Leon	4 803	6.6	774	1 864	656	768	622	9	110
Cataluna	14 811	20.3	556	3 189	4 114	3 313	2 619	245	775
Comunidad Valenciana	9 092	12.4	434	2 966	1 681	1 901	1 389	22	699
Extremadura	1 603	2.2	178	605	122	469	183	1	45
Galicia	5 276	7.2	536	2 128	758	716	882	61	195
Madrid	7 406	10.1	129	1 902	1 869	1 069	1 783	269	385
Murcia	2 203	3.0	129	921	232	450	312	11	148
Navarra	931	1.3	102	273	163	246	123	4	20
Pais Vasco	3 832	5.2	121	923	472	1 185	752	112	267
La Rioja	723	1.0	16	249	121	145	157	7	28
Ceuta y Melilla	408	0.6		121	246	24	1	9	7
Total	**73 065**	**100.0**	**4 510**	**23 224**	**13 997**	**15 214**	**11 623**	**1 014**	**3 483**

Source: ECI 1992 (INE).

Table E23: Geographical distribution of main wholesale trade data, Spain (1992)

Autonomous Community	Number of enterprises	Number of local units	Number of persons employed	Turnover (Mio ESP)
Andalucia	10 325	15 385	74 973	1 747 456
Aragon	2 471	3 410	16 874	446 533
Asturias	1 867	2 464	11 863	285 681
Baleares	1 397	1 851	9 614	232 118
Canarias	2 455	3 916	23 215	762 307
Cantabria	710	897	4 380	89 809
Castilla-La Mancha	2 752	4 019	17 486	431 760
Castilla-Leon	4 803	6 588	26 279	671 798
Cataluna	14 811	21 339	129 320	3 988 158
Comunidad Valenciana	9 092	12 654	76 353	1 641 181
Extremadura	1 603	2 202	10 330	243 114
Galicia	5 276	7 628	34 795	806 099
Madrid	7 406	11 304	94 044	3 561 871
Murcia	2 203	3 001	23 269	395 481
Navarra	931	1 271	5 423	165 090
Pais Vasco	3 832	5 399	26 362	801 621
La Rioja	723	1 061	3 995	109 893
Ceuta y Melilla	408	796	2 159	152 105
Total	**73 065**	**105 185**	**590 734**	**16 532 075**

Source: ECI 1992 (INE).

FRANCE

1. Introduction and key statistics

Assessing the trends in the wholesale trade in France since 1980 is not an easy task. Our relatively limited knowledge of this sector is a consequence of its heterogeneity and its role as middleman between the producers upstream and the retailers or professional users downstream. It comprises two separate groups which have developed along radically different paths, namely wholesalers of agricultural raw materials and food (the agri-food sector) and the rest.

Wholesaling, as a small-enterprise trade, is better at weathering periods of crisis and is able to adapt more rapidly and more flexibly than industry to economic change. Through stock management it plays a leading part in the business cycles of the goods markets.

As it moves, like the rest of the economy, towards greater reliance on technology and internationalisation, the sector is maintaining its economic and demographic vitality. This is especially true of the wholesale trade in capital goods, which is proving more innovative in terms of both markets and skills. In the agri-food sector, cost-cutting is leading to integration and concentration.

In 1994, intermediaries or commission agents included, wholesale trade accounted for a little over 4% of domestic employment and almost 37% of the total trade workforce, that is nearly one million people.

Strictly speaking (that is, excluding commission agents), the wholesale trade consists of about 85 000 enterprises of widely varying status: marketing subsidiaries of foreign groups or French industrial enterprises, international trading companies, cash & carry services for professional users, independent wholesalers, including those in Marchés d'interêt national[1] (MIN). Their diverse origins and position in the economic network (family business, converted former industrial enterprise, subsidiary of a group) add to the variety of a trade steeped in the ways of the markets in which it is carried on.

The economic contribution of the wholesale trade (see Table F1) is stable and between 1980 and 1994 held steady at around 6% of market Gross Domestic Product. Since 1980, however, there have been changes in the relative contributions of the various sub-sectors in favour of inter-industry wholesale trade, which in 1994 accounted for 54% of the sector's value added (as compared with 48% in 1980). There was a sharp contraction in the agri-food contribution around 1986 to 1988.

There are two main sources for the description of the wholesale trade in this chapter. These are the annual survey of commercial enterprises (EAE commerce) and the commercial sector accounts. The latter are based on tax data, exhaustive when finally processed but estimated over the most recent two years using other sources.

The detailed sectoral descriptions in this chapter relies on the new (NAF) nomenclature in use since 1993. Annual surveys in terms of the earlier nomenclature (NAP) have been used for the long-term time series in the chapter.

2. The structure of the wholesale trade

The wholesale trade includes a high proportion of small and very small enterprises. In 1994, 21% of enterprises had no employees (that is, wage and salary earners) and 81% had fewer than ten. Moreover, between 1980 and 1994 the share of these small enterprises increased, leading to a significant decline in average size for the sector as a whole (ten employees per enterprise compared with twelve at the beginning of the period). Only 1% of enterprises have more than 100 employees (see Table F2).

Most enterprises (61%, see Table F3) are private limited-liability companies (SARLs) and this group has developed at the expense of sole proprietorships because of the possibility of limiting financial risks and the creation, in 1985, of one-person SARLs. This status is frequently adopted by new enterprises and is favoured in all sectors of the wholesale trade with the exception of the more traditional agricultural raw materials sector. This still has 41% sole proprietorships as well as many co-operatives. In this latter sector half the enterprises have fewer than six employees: most of these small units are in the live animal and hides and leather trades.

During the period 1980-1994, the intensive

[1] An area specially managed by the public authorities to assist wholesaling transactions. The access conditions are regulated both for products and for operators, who enjoy security and special facilities. These markets have been set up, in general, in the suburbs of large cities or near major agricultural production areas.

restructuring in certain sectors of the non-food consumer goods and inter-industry wholesale trades reflected their efforts to adapt to intensified competition and changes in the economic environment. In the non-agri-food sector the total number of enterprises increased. As the more recently-established enterprises are also amongst the smallest, it is not surprising that the average size of enterprises should have significantly decreased.

This effect is most apparent in the non-food consumer goods sector. Here, where there is a very low proportion of enterprises with more than ten employees (13%), a swarm of small and very small enterprises is contending for shares in ever more competitive markets.

In certain non-food consumer goods markets, a small number of large enterprises account for most of the sales. This is the case with the wholesalers of pharmaceutical products and medical equipment who operate in markets protected by regulation and, to a lesser extent, with the household equipment wholesalers who deal in products for which there is a keen demand, such as domestic electrical appliances, radios and televisions. These two branches represent only 16% of the number of non-food goods wholesalers but 42% of their turnover. In the particular case of pharmaceutical products and medical equipment, 1% of enterprises, those with more than 200 employees, account for 70% of turnover. Between these extremes, the market shares of the enterprises with 10 to 99 employees were being gradually eroded during the period from 1980 to 1994 throughout the non-food consumer goods wholesale trade.

In contrast, the increasingly technical nature of the services provided is strengthening the presence of enterprises of this intermediate size (19%) in the capital goods wholesale trade. Moreover, they can lay claim to nearly half (45%) of the sector's total activity. At the same time, a small number of large enterprises dominates the wholesale trade in data-processing and office equipment, accounting for almost half the turnover.

27% of wholesale enterprises involved with non-agricultural intermediate products are companies with share capital and generally larger in size. In particular, in 1994, the wholesalers in ores and metals and in hardware and plumbing and heating supplies employed, on average, about 20 people and those in fuels more than 25 (see Table F4). Because of the decline of some types of user, most of these enterprises have been actively shedding labour to preserve the profitability of activities which are increasingly being exposed to international competition. One exception is the industrial chemicals sector, in which the number of wholesalers increased between 1980 and 1994 and employment levels were maintained. The concentration of distribution downstream is carrying the fuels wholesalers in its wake. The wholesalers in construction materials, sanitary equipment and plumbing and heating supplies, much home supplies oriented, have generally maintained their staffing levels, since their activities are centred on domestic markets which are less exposed.

There are considerable differences in the orientation of activity within the agri-food wholesale trade. The agricultural raw materials wholesalers upstream have agriculture and the agri-food processing industries as their principal outlets. They are very open to the outside world and their activity reflects the ups and downs of the European and global agricultural markets.

The food product wholesalers mainly supply the channels which serve to meet the domestic end-user (essentially household) demand. The global trend of their turnover is less subject to sudden swings.

In both cases, the constraints have grown tighter as a result of the concentration of the agri-food industries and food distribution (such as central buying offices, supermarkets and hypermarkets). Overall, in this activity the number of wholesale trade enterprises fell by 22% between 1980 and 1993 and their average size increased by about 8% which, together with the decline in the share of one-man businesses, led to a perceptible increase in the employment ratio.

There was a sharp fall in the number of raw agricultural and fresh product wholesalers during the period. Many disappeared from the meat sector (live animals, milk products, meat products, poultry and game) where competition is fierce and the wholesale function continues to be integrated into large-scale distribution. In the non-specialised food sector (groceries), concentration was more intense during the seventies. The average size of enterprises (44 employees in 1994) is now much larger than in the other food sectors, which also show considerable disparities in this respect.

3. Turnover of the wholesale trade

The total turnover of the wholesale trade, dynamic from 1968 to 1978, appears to have marked time in the following years (with a growth of 6% per annum in current francs from 1980 to 1994 - see Table F5) compared with the economy as a whole (7% growth of total GDP). As, in addition, the proportion of imports in wholesalers' purchases has increased (see Table F6), the fraction of the national wealth channelled through the wholesale trade has diminished. The extent of the erosion varies according to the sector.

The agri-food wholesale trade has a high turnover (FRF 964 billion in 1994, or 41% of total wholesale trade). But the trend growth per year of 6% in value and 3% in volume terms between 1980 and 1994, which is intermediate between the trends for the non-food consumer goods and inter-industry wholesalers, masks the fact that numerous sub-sectors are actually becoming increasingly fragile.

The wholesale trade in raw agricultural products (chiefly cereals, foodstuffs and live animals) performed fairly well during the period 1980-1994. Most of its activity consists in reselling goods in bulk without further processing. The turnover is therefore considerable and represents 35% of that of the entire agricultural and food wholesale trade but the mark-up (defined as the ratio of gross margin to turnover) is low. This activity chiefly depends on intermediate consumption in agriculture and the agri-food processing industries and on foreign demand.

In fact, 60% of customers are farms or agri-food industries and a significant proportion of sales (20%) is for export. Over the period, the trend in the turnover, in value terms, of the agricultural raw materials wholesalers (chiefly cereals and foodstuffs) seems to have held up well at an annual average growth of 7% as compared with agri-food intermediate consumption (4%) and export (7%). For a time, in 1993 and 1994, the set-aside programme linked with the reform of the Common Agricultural Policy caused a sharp contraction in the export activity of the cereals and oilseed wholesalers until it began to pick up again in 1995. At the same time, the live animal and hides and leather wholesalers became structurally more vulnerable.

The food wholesale trade is more directly linked to retailers and to household consumption. Overall, however, the latter is growing more rapidly than turnover. To the penalising effects of the shortening of distribution chains must be added the shift in the pattern of household consumption (including canteens), which is most seriously affecting the butcher's meat and meat products wholesale trade. Some sectors (groceries and those specialising in various food products), benefiting from the spread of new products such as quick-frozen foods and ethnic imports, are recording healthier increases in turnover (8% and 4% between 1980 and 1994 in value and volume terms respectively for these sectors as a whole).

Based mainly on goods intended for individual consumers, the activity of the non-food consumer goods wholesale trade depends heavily on household buying trends. Though regular and sustained between 1980 and 1994, the rate of growth of turnover in real terms at an annual average of 4% conceals considerable differences between sectors.

On some markets, the customer base, consisting mainly of wholesalers, central purchasing units and retailers, includes a not insignificant professional component with its own dynamics.

One example is the wholesale trade in pharmaceutical products and medical equipment, which serves a diversified clientele of health-sector professionals and dealers. The wallpaper and cleaning materials trade also sells to industry and public bodies. One fifth of textiles wholesalers' sales are made directly to industry. The customer base of the stationery wholesalers, which is very broad, includes the service trades.

Furthermore, the distribution of sales by customer type on the domestic market gives an idea of the length of the distribution chains. Resellers (such as wholesalers and central purchasing units) make up the majority of customers in the domestic electrical appliance, radio and television, wallpaper and cleaning materials, perfumery and beauty products, and toys wholesale sectors. Elsewhere the chains are shorter.

An analysis of the activity observed during the period 1980-1994 reveals two categories of wholesalers. Those in the first category have benefited from positive growth. They include wholesalers in pharmaceutical products and medical equipment and those in perfumery and beauty products, whose downstream markets have prospered over the medium term, together with wholesalers of household equipment (domestic electrical appliances, radios, televisions), who are nevertheless more exposed to the vagaries of the household durables market, and personal outfitting wholesalers (clothing, footwear, leather goods), whose markets have recovered thanks to more competitive prices, the result of more production being shifted abroad.

On the other hand, the household tableware, kitchenware and glassware wholesalers, who are suffering from sluggish demand, the wallpaper and cleaning materials wholesalers, threatened by vertical integration, and the textile products wholesalers, who face foreign competition, all appear to be stagnating.

The activity of inter-industry wholesalers (1994 turnover FRF 812 billion) depends less on their export outlets, responsible for 7% of turnover (see Table F6), than on the business cycle-related fluctuations in corporate investment. The latter account for the irregular trends in turnover and output volumes which reflect the upturns and downturns in investment, up between 1985 and 1990 and down between 1991 and 1993.

A clear distinction can be made between the capital goods (machinery, equipment and supplies) and non-agricultural intermediate products wholesalers: the former are sustained by a positive domestic demand, whereas the latter are suffering from the decline of the national industrial markets and are being forced to open up to the outside world, thereby exposing themselves to fiercer competition.

The wholesalers of data-processing and office equipment (FRF 110 billion) and the wholesalers of industrial equipment (machine tools, textile and clothing machinery, miscellaneous industrial supplies and equipment: FRF 110 billion) had the highest turnover growth rates (around 11% and 3% respectively, annual average in volume terms) between 1980 and 1994. On the other hand, the fuels, metals and timber wholesale trades all stagnated.

The electrical and electronic equipment wholesale trade, an important sector (FRF 77 billion), mainly relies on professional user demand. Between 1980 and 1994, its turnover in value terms rose at an average rate of 6%, which corresponds to the growth of corporate investment.

4. Secondary activities

In the non-agricultural intermediate product trade, some wholesalers engage in secondary retailing activities which can account for as much as 7% of turnover in fuels, construction materials and sanitary equipment and 4% in wood and wood products. Over the period in question, these sales proved to be a boon for the last two sectors as purchases by private individuals soared.

The activities of capital goods wholesalers are more diversified than those of the rest of the wholesale trade and, in particular, include services (6% of turnover). For the data processing and office equipment wholesalers these supplementary activities account for a substantial proportion of turnover. In the construction machinery wholesale trade these service activities are advisory (6% of turnover).

5. Trading margin

Thanks to improved gross margins, output in value terms in the wholesale trade increased more rapidly (8% per annum on average) than turnover during the period 1980-1994. The mark-up reflects the importance of the commercial service provided and the competitive advantage (the intensity of competition and the degree of differentiation of the product); the former being expressed in the commercial service volume, the latter in the price. The mark-up for the wholesale trade as a whole (26% in 1994) is less than that for the retail trade (31%, see Table F7). However, during the last ten years the gap has narrowed. The wholesale trade therefore seems to be making a better job of exploiting its commercial services, which may reflect less keen competition and hence the possible incorporation into the margins of decreases or smaller increases in prices upstream (producer and import prices). Thus the turnover price index increased by 3.5% per annum on average and the commercial service price index by 5% in the wholesale trade between 1980 and 1994.

The non-food wholesalers have performed better in terms of output volume, while the inter-industry wholesalers have done better in terms of commercial service prices.

The good performance of the mark-up in the wholesale trade derives from that for inter-industry goods, which rose substantially from 24% in 1980 to 36% in 1994. The wholesalers benefited upstream from the fall in the relative prices of intermediate goods and capital goods, which make up a considerable proportion of their purchases, and downstream from the vitality of the demand in the principal sub-sectors. Thus, between 1980 and 1994, most of the improvement in their margins came from the commercial service price (6%) rather than from volume, which increased only at the rate of 2% as compared with 4% in the agri-food and non-food wholesale trades.

Business practices differ sharply from one sector to another. The mark-up may vary by a factor of four between the agricultural wholesale trade, which has the lowest, and the capital goods trade, which has the highest mark-up.

In the agri-food and non-food consumer goods wholesale trades the mark-ups, while very stable, follow a slightly rising path. Since 1988, the commercial service output volume in these two sectors has reached comparable levels, one quarter lower in 1994 than that reached in the inter-industry wholesale trade.

In the agri-food wholesale trade the mark-up is generally poor (16%), in particular because of the performance of the raw agricultural products and fresh food products sectors. It is higher (29%) in the non-food consumer goods wholesale trade.

In fact, the mark-up depends to a large extent on the dynamism of the sector and the degree of processing of the products. The return on sales for the non-food consumer goods wholesale trade (excluding pharmaceutical products and medical equipment) is 6 percentage points higher than that for the wholesale trade as a whole. The same applies to the beverages sector, where the commercial service is paralleled by a bottling and packaging service, while in perfumery and wallpaper and cleaning materials the difference is more than 16 points. On the other hand, it is about 14 points lower in the cereals and foodstuff, live animals, milk products, and poultry and game sectors, which have been obliged to pare their margins under pressure from industry and the distributors.

In the capital goods sector the return is uniform and distinctly higher (by about 16 points) than the wholesale trade average, except in the agricultural equipment and electrical and electronic equipment branches, where the mark-ups are slightly lower.

6. Value added and costs

The fall in the value-added ratio, that is the ratio of value added to output, from 65% to 59% between 1980 and 1994 is a reflection of heavier operating costs (excluding personnel costs) (see Table F8).

The agri-food sector is characterised by a low value added ratio (51% in 1994, as compared with 54% and 67% for the non-food consumer goods and inter-industry sectors respectively) which fell by seven points during the period 1980 to 1994.

In the non-food consumer goods wholesale trade, the value-added ratio declined sharply, from 67% to 54%, under the influence of an adverse trend in the relative price of inputs, which are now making as big a contribution to costs as in the agri-food sector, absorbing almost half the gross margin.

On the other hand, where value added is concerned, the inter-industry wholesalers are reaping the benefits of their trading advantages; the increase in the price of their business service has enabled them to limit the decline in their value added ratio (69% in 1980, 67% in 1994) and record a respectable increase in value added, despite a sensitivity to the business cycle more acute than in the other two sectors.

The disparity in sectoral value-added ratios reflects differences in cost structures. Raw agricultural products, especially cereals and foodstuffs, have the lowest value-added ratios, more than ten points below that for the wholesale trade. At the other end of the scale, the value-added ratios for the capital goods wholesale trades are very uniform and about seven points above average except in the data-processing and office equipment sector, which is close to the average.

In the food product (other than fresh) and non-food consumer goods (other than pharmaceuticals and medical equipment) wholesale trades, the value-added ratios are close to the average. However, although their trading activity may be at high levels, some expanding sectors (specialised foods, perfumery and beauty products) are incurring operating costs which are weighing heavily on their value-added ratios. The more traditional sectors (pharmaceuticals and medical equipment, tableware, kitchenware and glassware, wallpaper and cleaning materials, stationery) have the advantage of appreciably higher value-added ratios.

In accountancy terms, the operating mark-up (that is, the ratio of gross operating surplus to value added at market prices) depends on the size, relatively to value added, of the remuneration of employees and the taxes net of subsidies. At this stage, the taxes are those on products and production. Downstream the gross operating surplus is used to remunerate the individual entrepreneur and capital and to finance investment and stocks.

Much of the value added in the wholesale trade goes towards personnel costs. Between 1980 and 1993, wages rose at the same rate as for distributive trade in general (7%) but the level is still appreciably higher. This explains the difference between the operating mark-up in wholesaling (25%) and that for trade in general (34%), the wholesale trade making proportionately less use of self-employment.

Under the pressure of competition, the wholesalers, particularly in the inter-industry sector, are concentrating on improving the qualifications of their personnel with a view to providing a better service. In that sector, which reports the best results, improved mark-ups have been accompanied by a sharp increase in personnel costs which, however, have been less than the increase in value added. Thus, it is the impact of higher product taxes (TIPP[2]) on sales value that chiefly accounts for the sharp squeeze on

[2] An internal tax on petroleum products.

the operating mark-up observed in the sector. This mark-up is now more than ten points lower than in 1980, when it was comparable with that for the non-food consumer goods wholesale trade. Nevertheless, this tax has not affected the gross operating surplus of the petroleum products wholesalers.

In the inter-industry wholesale trade, other important sectors (agricultural machinery, industrial equipment, construction machinery, data processing and office equipment) are also characterised by a high trading mark-up and a low operating mark-up, the result in this case of high costs which are difficult to contain.

Between 1980 and 1994, production taxes remained at moderate levels in the non-food consumer goods wholesale trade but the growth of personnel costs, slightly more rapid than the increase in value added, tended to drag down the operating margin.

Public transfers had a favourable effect on the gross operating surplus in the agri-food wholesale trade. Operating subsidies, mainly in the form of export refunds, more than offset taxes and charges. This applies in particular to the cereals and foodstuffs wholesale trade, which recorded the highest operating mark-up despite a low trading mark-up.

7. Employment

The employment characteristics of the wholesale trade (see Table F9) resemble those of industry more closely than those of the retail trade or the market services sector. In fact, the functions performed constitute an extension of industrial activity. At the same time as packaging the goods, wholesalers are increasingly undertaking finishing operations. In certain partnership situations they are even becoming involved in manufacturing. Logistical services - storage, handling and transport - play an important part and the products distributed, a high proportion of which are intended for industry, sometimes have very advanced technical characteristics.

As in industry, paid employment is the norm (92% of the number of persons employed) and over two-thirds of the workforce are male. This contrasts with the service sector and the retail trade, where half of the employees are women. Consequently, there is not much part-time working in the wholesale trade and no sign of it increasing (6% of total employment as against 18% in the retail trade; see Table F10).

In general, between 1980 and 1994 employment in the wholesale trade tended to vary in phase with total domestic employment: the main periods of decline (1982-1985 and 1992-1994) and recovery corresponded (see Chart F1). Between 1982 and 1990, production industry lost 510 000 jobs while the market services sector created 1 430 000. In the wholesale trade, on the other hand, employment stood up well, although without actually expanding. However, during the recession of 1992-1994, there was a decline in the numbers employed in the wholesale trade (62 000), whereas retail employment resisted the trend.

As the food wholesale trade became more concentrated it steadily lost jobs, at the rate of 1.2% per year (or 47 000 people in total) between 1980 and 1994 (see Chart F2). Poorly-qualified manual workers make up a large proportion of the workforce and there is more recourse to part-time working than in the rest of the wholesale trade, since the agricultural raw materials and cattle wholesalers rely upon part-time workers for some of their seasonal activities. Accordingly, the proportion of value added applied to meet wage costs has remained under control.

The decline of the traditional wholesale function, chiefly in the live animal and hides and leather sectors, has led to the halving of the number of dependent workers.

In fact, food wholesalers who are not shedding staff (various specialists, particularly in quick-frozen foods) are few and far between. Most are cutting back severely, particularly in fresh food products and the meat chain: meat and meat products, milk products, poultry and game.

Within the wholesale trade, employment in the non-agri-food sectors is the most dynamic component, with a pronounced cyclical profile. By the time the downturn arrived in 1990-1991, it had increased by over 100 000 since 1980.

The substantial proportion of managerial and intermediate-level staff (42% for non agri-food wholesale in 1990) is increasing, so that the qualifications of the workforce are at a level and on a trend better than for the economy as a whole. This higher level of skill is associated with a lower proportion of young people than in the retail trade (11% as against 16% of under-25s in 1990).

Enterprises are trying to enhance and improve the quality of their business services, this being one of their principal means of adaptation. From this standpoint, human resources take precedence. Wholesaling activity is being increasingly supplemented by the provision of training, maintenance and advisory services, particularly in the capital goods sector, which means hiring suitably qualified personnel.

8. Productivity

Between 1982 and 1990, the productivity of the wholesale trade, calculated as the ratio of real gross margin to total persons employed, grew at an average annual rate (see Table F11) similar to that observed in production industry (3%) and higher than that recorded for trade and market services in general (2%). It is known that returns to scale create a positive link between productivity and the size of the enterprise. This only makes the wholesale trade's productivity gains the more remarkable since it actually consists of small enterprises whose average size is, moreover, tending to decrease in the non-food and inter-industry sectors.

The agri-food wholesale trade is characterised by low productivity (in 1990, FRF 276 000 per person as against FRF 278 000 per person and FRF 319 000 per person for the non-food and inter-industry components respectively). However, its productivity has grown more rapidly (3% on average between 1982 and 1990) than in the non-food and inter-industry wholesale trades (about 2%) thanks to the good performance of the agriculturals raw material and cattle wholesalers, who combine stable employment with a sustained improvement in margins (5% between 1982 and 1990). However, in the rest of the food sector, progress is being limited by the generally adverse trend in margins. Even in the groceries, miscellaneous specialised food and quick-frozen food sectors, which are otherwise more dynamic, the productivity gains are mediocre since, although staff levels in groceries are being cut, the other two sectors are hiring staff in order to establish a foothold in developing markets (quick-frozen and exotic foods), where marginal returns are still increasing.

Another category of wholesalers stands out, namely those who specialise in capital goods in the inter-industry wholesale trade. Over the period 1982-1990, in expanding markets, they have succeeded both in creating jobs (+3%) and making important gains in productivity (+4.5% per year on average). In particular, there has been a sharp increase in the numbers employed in the data-processing and office-equipment wholesale trade and in the industrial equipment trade.

In the non-food consumer goods wholesale trade, the situation is varied. The best productivity gains have been achieved in the sectors with the best trends in activity (pharmaceuticals, perfumery and cosmetics). There has been little improvement in the textiles, clothing and footwear sectors, however.

9. Investment

Investment in the wholesale trade measured as the ratio of gross fixed asset formation to value added (8% in 1992) has been lower than in non-financial enterprises as a whole (16%; see Chart F3). It is now also about 1.5 points lower than for distributive trade as a whole (9.5%), within which the general food trade has made the biggest effort (17%) because of the increase in the number of supermarkets and hypermarkets.

During the period 1980-1992, there was no upsurge in investment by enterprises in the wholesale trade. The investment flow increased slightly less than that of the non-financial enterprises of the economy in general (5% per year on average in value terms). The sector seems to be being transformed less by tangible than by intangible investments, which are not always clearly identified or calculated in the accounts and whose importance in a modern economy is tending to increase. These investments are exemplified by expenditure on software and advertising. Much more broadly, it would be necessary to be able to assess the long-term thinking and action in which enterprises engage in order to determine what strategic position to adopt and make themselves known, review their internal organisation and develop their human resources.

There is another factor with a decisive influence on corporate investment: the size of the enterprise. Enterprises with 3-19 employees make up the bulk of the wholesale trade (45% of the number of enterprises) and it is precisely these enterprises which are investing the least (between 5% and 6%).

As distinct from the retail trade, where purchases of land, buildings and structures predominate, most of wholesale trade investment, nearly 66% of the FRF 21.4 billion invested in 1993-1994, relates to purchases of equipment and transport vehicles.

The total investment/value added ratio (10%) is higher than average (8%) in both the fresh food products and data-processing and office equipment wholesale trades, which are modernising their equipment (see Table F12). On the other hand, it is modest (5 to 6%) in the other capital goods and non-food consumer goods trades (excluding pharmaceuticals and medical equipment).

The wholesalers in the food products (other than fresh food) sectors, anxious to increase the size of their enterprises, show more interest in investing in buildings and structures (42% of their total investment in 1993-1994). The same applies to the wholesalers in raw agricultural products and non-agricultural intermediate goods (particularly those in cereals and foodstuff and in construction materials) although their aim is different, namely to increase storage capacity.

In the non-food consumer goods and capital goods wholesale trades, the fact that services are becoming more technically sophisticated is steering investment towards the purchase of equipment; the latter sector is devoting 67% of its investments to equipment purchases and restricting the share earmarked for transport vehicles to 13%.

10. International trade

In 1994, distributive-trade enterprises in general, including intermediaries and retailers, contributed 12% to total exports and 26% to total imports. In these circumstances, the wholesale trade, which was responsible for 81% of the volume of international transactions for distributive-trade enterprises as a whole, would appear to be an outward-facing activity, albeit less open to the outside world than the economy in general.

Structurally, it is an importer in the non-food and inter-industry sectors, where numerous marketing subsidiaries of large foreign enterprises established in France serve to distribute foreign products on the domestic market. On the other hand, the domestic producers do not resort very much to wholesalers for their export business, preferring either to export through their own marketing network or to use the services of a foreign wholesaler positioned in the market of destination. Overall, then, the wholesale trade is in deficit in terms of the balance of trade in goods (FRF 128.7 billion in 1994) and in terms of the balance of payments (FRF 127.2 billion in 1994).

In 1994, the balance of payments of wholesale trade had a surplus of FRF 11 billion on the food sector, which accounted for 42% of the total income of the wholesale trade and only 22% of its expenditure; at the same time, it was in deficit by FRF 58 billion and FRF 80 billion in the non-food and inter-industry sectors respectively, the latter accounting for more than 47% of wholesalers' expenditure as compared with 36% of income.

The agri-food wholesale trade, traditionally an exporter on its principal markets (cereals and foodstuff, hides and leather), depends on world demand and the Common Agricultural Policy, the effects of which combined in 1993 and 1994 to produce a chance contraction in the contribution of exports to turnover (14% in 1994 as compared with 17% in 1980).

Between 1980 and 1993, there were profound changes in the geographic orientation of activity in important sectors of the non-food and inter-industry wholesale trades.

Both supplies and sales of non-food consumer goods were affected. Structurally an importer (28% of purchases involved imports), the wholesale trade in non-food consumer goods has consolidated its role as a national staging post in the marketing of foreign products. Foreign demand is playing an ever-increasing part in the sector's growth since, over a period of thirteen years, there has been a sharp increase in the contribution of exports to turnover; in 1994 this contribution amounted to 10%, which explains why over the period 1980-1994 turnover increased more rapidly (+8%) than household consumption.

The most spectacular change was that involving the wholesale trade in clothing, footwear and leather goods, where the contribution of imports to purchases rose from 34% to 42% between 1980 and 1993 and the contribution of exports to turnover from 7% to 17%. The textiles trade sold much more abroad (19% of turnover in 1993 as compared with 7% in 1980); in the toys, stationery and smokers' accessories wholesale trade, nearly half of purchases (45%) now come from abroad (35% in 1980). The redeployment of much industrial production beyond the national boundaries partly explains the stepped-up trade with third countries.

For the same reasons, the inter-industry wholesale trade is also obtaining more of its supplies from abroad. Between 1980 and 1994 the contribution of imports to purchases rose from 22% to 26%, and the trade has also opened up to exports (during the same period the contribution of exports to turnover rose from 5% to 7%). The main sectors are expanding their purchases abroad (data-processing and office equipment, electrical and electronic equipment, industrial equipment).

Despite its importance, in wholesaling international trade is highly concentrated and this tendency becomes more apparent whenever business is slow; in 1992, about one enterprise in ten was involved in foreign transactions; the first ten enterprises earned 34% of the income while the first ten importers accounted for 23% of the expenditure. At the same time, the wholesale trade's current-account deficit is increasing as a result of the loss of market share in trade-related services (particularly transport services).

Table F1: Share of wholesale trade in market GDP [1] in current prices, France (1980 - 1994)

	1980	1985	1990	1991	1992	1993	1994
Market GDP (Mio FRF) [1]	2 360 084	3 904 582	5 493 954	5 699 430	5 864 298	5 868 311	6 105 731
Wholesale total							
Value added (Mio FRF)	138 196	237 669	338 103	344 927	340 317	344 345	357 865
Share (%) of GDP	5.9	6.1	6.2	6.1	5.8	5.9	5.9
Wholesale food							
Value added (Mio FRF)	35 768	61 625	74 930	76 114	78 757	77 229	76 634
Share (%) of GDP	1.5	1.6	1.4	1.3	1.3	1.3	1.3
Wholesale non-food							
Value added (Mio FRF)	36 409	58 439	83 435	84 766	85 129	85 715	87 537
Share (%) of GDP	1.5	1.5	1.5	1.5	1.5	1.5	1.4
Wholesale inter-industry							
Value added (Mio FRF)	66 019	117 605	179 738	184 047	176 431	181 401	193 694
Share (%) of GDP	2.8	3.0	3.3	3.2	3.0	3.1	3.2

[1] Related to market output only.
Source: Commercial sector accounts, 1994.

Table F2: Distribution of enterprises and turnover in wholesale trade by employment size class, France (1994)

Activity	Employees									
	0 and not categorised		1-9		10 - 99		≥100		Total	
	Number of enterprises (%)	Turnover (%)	Number of enterprises (%)	Turnover (%)	Number of enterprises (%)	Turnover (%)	Number of enterprises (%)	Turnover (%)	Number of enterprises (%)	Turnover (%)
Agricultural raw materials	37.1	23.9	51.9	18.0	10.0	28.4	1.0	29.6	100.0	100.0
Food products	25.8	13.6	51.6	14.4	21.3	41.9	1.2	30.1	100.0	100.0
Non-food consumer goods	27.7	3.0	59.2	22.3	12.4	34.2	0.7	40.5	100.0	100.0
Non-agricultural intermediate products	13.8	13.6	58.8	14.9	25.4	37.6	1.9	33.8	100.0	100.0
Capital goods	18.0	2.4	62.0	19.9	19.0	45.0	0.9	32.7	100.0	100.0
Other wholesale	31.5	3.2	63.7	20.0	4.8	76.8	0.0	0.0	100.0	100.0
Total	**23.3**	**11.0**	**57.9**	**17.5**	**17.7**	**38.3**	**1.1**	**33.2**	**100.0**	**100.0**

Source: Annual business trade survey, 1994.

Table F3: Distribution of wholesale trade enterprises according to legal status, France (1994)

Activity	Legal status					
	Sole proprietorships	Partnerships	Limited liability companies (SARL)	Companies with share capital	Others companies	Total
	Share (%)					
Agricultural raw materials	41.2	1.2	35.5	12.2	9.9	100.0
Food products	19.9	1.7	52.0	20.8	5.6	100.0
Non-food consumer goods	12.7	1.0	71.2	14.6	0.4	100.0
Non-agricultural intermediate products	13.6	1.2	56.0	27.4	1.8	100.0
Capital goods	11.9	0.9	64.3	22.3	0.6	100.0
Other wholesale	14.8	1.6	77.0	6.6	0.0	100.0
Total	**16.0**	**1.2**	**61.1**	**19.4**	**2.3**	**100.0**

Source: Repertoire Sirene France métropolitaine, INSEE.

Table F4: Employment and turnover in wholesale trade enterprises, France (1994)

Activity	Number of enterprises	Persons employed	Turnover (excluding VAT) (Mio FRF)
	Share (%)		
Agricultural raw materials	8.9	6.8	14.1
Fresh food products	10.0	10.2	12.5
Other food products	9.4	10.8	13.6
Pharmaceuticals and medical equipment	2.7	4.2	5.5
Non-food consumer goods [1]	24.1	16.8	13.1
Fuels	0.7	2.0	6.6
Construction materials and home supplies	9.3	12.9	7.7
Industrial intermediate products	4.7	6.5	8.3
Data-processing and office equipment	7.9	8.2	5.3
Capital goods [2]	21.3	21.2	12.9
Other wholesale	0.9	0.3	0.3
Total	**100.0**	**100.0**	**100.0**

[1] Excluding pharmaceutical and medical equipment.
[2] Excluding data-processing and office equipment.
Source: Annual business trade survey, 1994.

Table F5: Trends in wholesale trade turnover, France (1980 - 1994)

Sector	Turnover in value terms			Turnover in volume terms [1]	Turnover price index
	Value (Mio FRF)	Value (Mio FRF)	Average annual growth rate (%)	Average annual growth rate (%)	Average annual growth rate (%)
	1980	1994	1994/80	1994/80	1994/80
Agri-food wholesale	439 741	964 529	5.8	3.0	2.7
Non-food wholesale	196 522	566 477	7.9	4.1	3.7
Inter-industry wholesale	403 918	812 073	5.1	1.1	4.0
Total	**1 040 181**	**2 343 079**	**6.0**	**2.5**	**3.4**

[1] Base year 1980.
Source: Commercial sector accounts (1994).

Table F6: Contribution of imports and exports to wholesale trade, France (1980 - 1994)

Sector	Proportion of sales that are exported (%)		Proportion of purchases imported (%)	
	1980	1994	1980	1994
Agri-food wholesale	17.1	13.6	7.7	7.2
Non-food wholesale	5.7	10.0	28.2	28.4
Inter-industry wholesale	5.5	7.3	22.4	25.9
Total	**10.5**	**10.3**	**16.9**	**18.8**

Source: Annual business trade survey (EAE commerce).

Table F7: Mark-up ratios in the wholesale and retail trades, France (1980 - 1994)

Years	Wholesale				Retail
	Total	Agri-food	Non-food	Inter-industry	
	(%)				(%)
1980	20.3	14.0	27.7	23.7	31.9
1985	21.7	13.8	28.0	28.4	30.8
1990	24.4	14.9	28.3	32.6	30.9
1991	24.9	15.2	28.4	33.9	30.7
1992	24.7	14.9	28.6	34.7	30.9
1993	25.4	15.5	28.7	35.9	31.1
1994	25.7	15.6	28.6	35.7	30.9

Source: Commercial sector accounts.

Table F8: Value-added ratio [1] in the wholesale trade, France (1980 - 1994)

Years	Total	Agri-food	Non-food	Inter-industry
		(%)		
1980	65.3	58.2	67.0	69.0
1985	64.2	57.8	62.6	69.1
1990	62.7	55.7	59.2	68.1
1991	61.3	53.5	57.4	67.5
1992	59.6	52.9	55.0	66.1
1993	59.2	51.0	54.5	66.4
1994	59.4	50.8	54.1	66.8

[1] The value added ratio is the ratio value added/output.
Source: Commercial sector accounts.

Table F9: Structure of employment in wholesale trade and comparison with the main sectors of the economy, France (1982 - 1990)

Sector	Number of persons employed (1 000)		Growth of number of persons employed between 1982 and 1990		Proportion of employees (%)		Proportion of women (%)	
	1982	1990	Change (1 000)	Average annual growth (%)	1982	1990	1982	1990
Industry	**5 574**	**5 064**	**-510**	**-1.2**	**94.9**	**94.7**	**29.5**	**29.9**
Wholesale trade	**901**	**970**	**69**	**0.9**	**91.2**	**91.8**	**30.9**	**32.3**
Agri-food wholesale	297	282	-15	-0.6	87.9	89.9	29.5	30.2
Non-food wholesale	249	292	43	2.0	92.5	92.5	38.8	39.6
Inter-industry wholesale	355	396	41	1.4	93.1	92.6	26.6	28.3
Retail trade	**1 591**	**1 649**	**58**	**0.4**	**67.9**	**73.2**	**56.7**	**58.9**
Market services	**8 595**	**10 026**	**1 431**	**1.9**	**82.4**	**84.1**	**47.0**	**48.9**

Source: 1982 and 1990 censuses.

Table F10: Characteristics of employment, France (1982 - 1990)

Sector	Proportion of part-time workers	Proportion of managerial and intermediate-level staff		Proportion of under-25 year olds		Proportion of those 50 years old and over	
	1990	1982	1990	1982	1990	1982	1990
Industry	**4.4**	**23.0**	**28.5**	**14.0**	**10.8**	**20.8**	**17.1**
Wholesale trade	**5.8**	**30.0**	**37.6**	**14.3**	**10.6**	**21.4**	**17.0**
Agri-food wholesale	7.4	20.0	25.6	15.5	10.8	23.5	19.2
Non-food wholesale	6.2	34.6	42.4	14.9	10.9	20.3	15.7
Inter-industry wholesale	4.3	35.1	42.6	13.0	10.2	20.3	16.4
Retail trade	**18.3**	**15.6**	**19.1**	**18.1**	**16.1**	**24.1**	**18.7**
Market services	**13.5**	**28.1**	**33.7**	**15.2**	**11.7**	**20.4**	**16.6**

Source: 1982 and 1990 censuses.

Table F11: Productivity trends in wholesale trade, France (1982 - 1990)

Activity	Annual average growth rate (%)		
	Output volume	Total employment	Productivity output
Agricultural and food overall	**2.5**	**-0.6**	**3.1**
Agricultural raw materials and cattle	5.2	0.6	4.6
Meat without slaughtering	-1.3	-3.2	1.9
Fresh agricultural products	0.8	-1.2	2.0
Beverages	0.4	-2.1	2.5
Groceries and miscellaneous food products	4.0	1.3	2.7
Non-food overall	**4.1**	**2.0**	**2.1**
Equipment goods, professional and domestic	3.9	2.3	1.6
Textiles, clothing, footwear	2.0	1.3	0.7
Pharmaceuticals, perfumery, home devices and cleaning materials	4.9	1.2	3.7
Miscellaneous non-food products	5.5	2.5	3.0
Inter-industry overall	**3.8**	**1.4**	**2.4**
Fuels, ores and miscellaneous materials	-1.5	-3.0	1.5
Raw materials and inter-industry goods	2.5	0.1	2.4
Capital goods and various supplies	7.7	3.2	4.5
Total	**3.6**	**0.9**	**2.7**

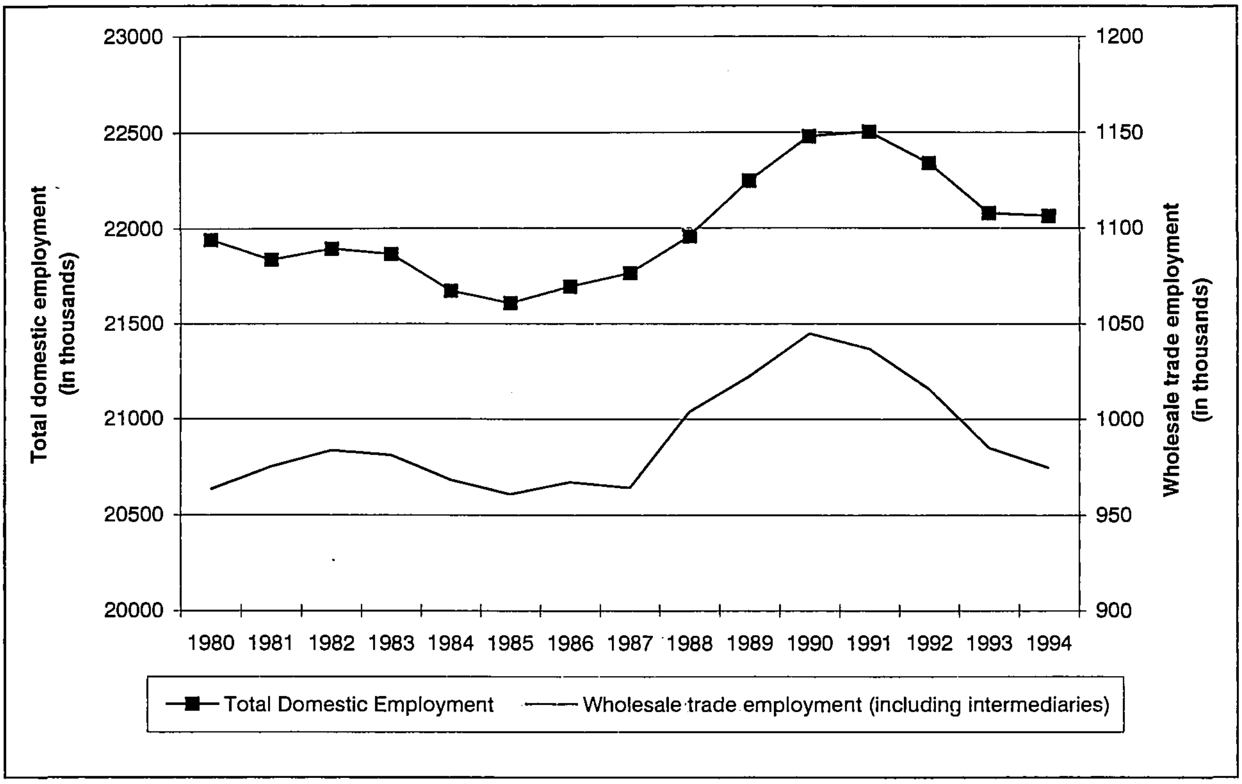
Source: Commercial sector accounts (1994).

Table F12: Average investment in wholesale trade, France (1993 - 1994)

Activity	Total gross investment	Land, buildings and structures	Vehicles	Equipment	Investment ratio [1]
	Mio FRF				(%)
Agricultural raw materials	**3 210.0**	**1 567.5**	**477.5**	**1 165.0**	**19.8** [2]
Food products	**4 748.0**	**1 758.0**	**851.0**	**2 139.0**	**9.6**
Fresh food products	2 018.5	599.5	482.0	937.0	10.0
Other food products	2 729.5	1 158.5	369.0	1 202.0	9.3
Non-food consumer goods	**3 299.5**	**1 106.0**	**528.0**	**1 665.5**	**6.0**
Pharmaceuticals and medical equipment	965.5	161.5	95.0	709.0	8.3
Other non-food consumer goods	2 334.0	944.5	433.0	956.5	5.3
Non-agricultural intermediate goods	**4 675.5**	**1 727.5**	**821.0**	**2 127.0**	**7.6**
Fuels	1 133.5	307.0	136.5	690.0	8.3
Construction materials and home supplies	2 136.0	930.5	445.5	760.0	7.5
Industrial intermediate goods	1 406.0	490.0	239.0	677.0	7.3
Capital goods	**5 433.5**	**1 113.5**	**688.5**	**3 631.5**	**7.2**
Data-processing and office equipment	2 271.5	334.5	117.0	1 820.0	10.4
Other capital goods	3 162.0	779.0	571.5	1 811.5	5.9
Other wholesale	**67.0**	**44.0**	**7.5**	**15.5**	**11.6**
Total	**21 432.5**	**7 316.5**	**3 372.5**	**10 743.5**	**8.3**

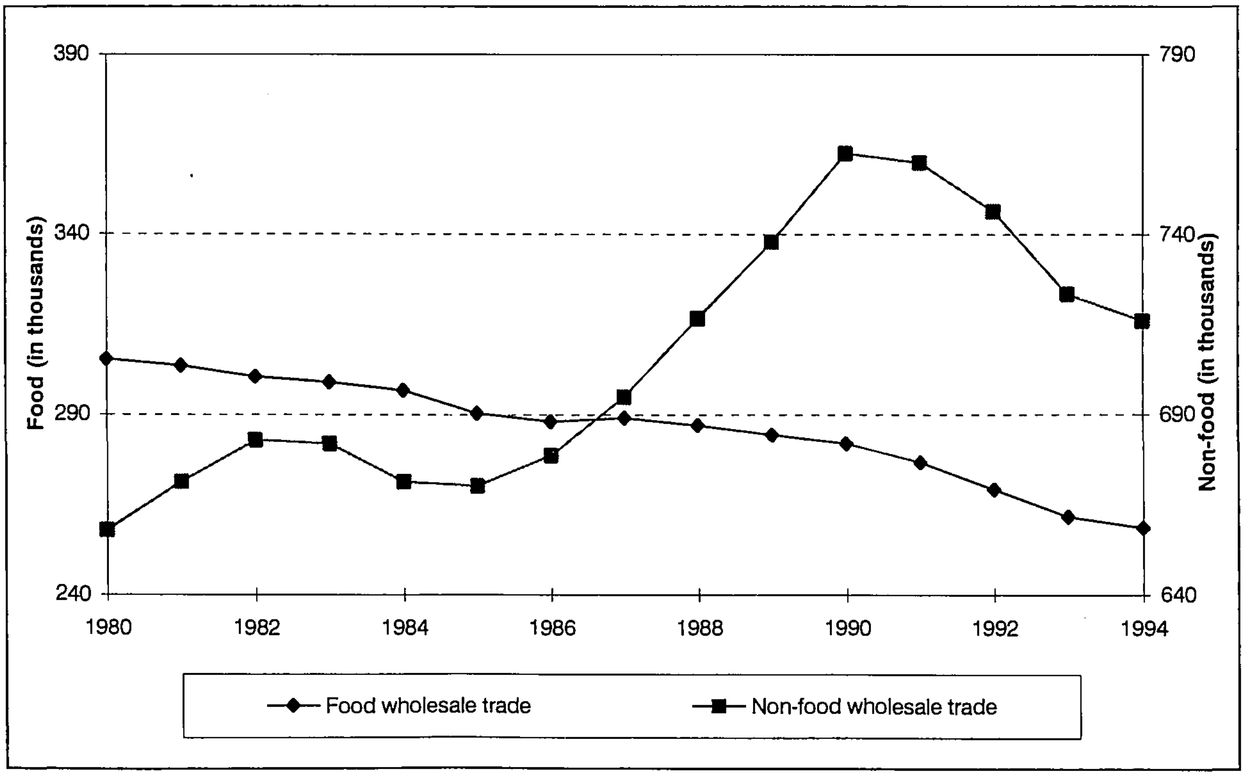
[1] Investment/value added.
[2] In the agricultural raw materials sector, the accounting structure is distorted by the high level of operating subsidies which inflate the results of the enterprises downstream of the value added; the consequence of these atypical circumstances is an artificially high investment ratio.
Source: Annual business trade survey, 1993 and 1994.

Chart F1 - Comparison of trends in wholesale trade employment and total domestic employment [1], France (1980 - 1994)



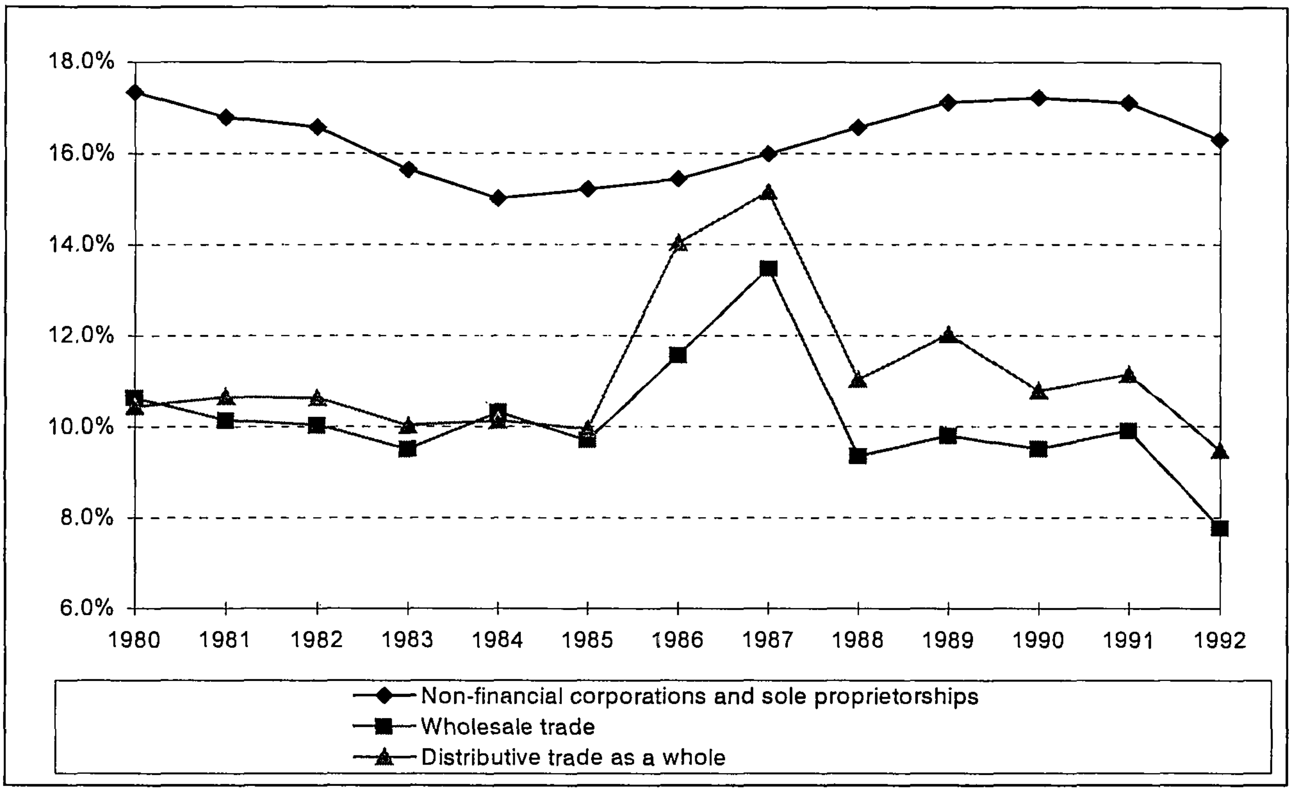
[1] Annual average dependent and non-dependent employment.
Source: INSEE, Employment Division.

Chart F2 - Employment [1] trends in the wholesale trade, including intermediaries, France (1980 - 1994)



[1] Annual average dependent and non-dependent employment.
Source: INSEE, Employment Division.

Chart F3 - Investment ratio trends between 1980 and 1992 [1], France



[1] The investment ratio is the ratio of gross fixed asset formation to value added.
Source: National Accounts and commercial sector accounts.

IRELAND

1. Introduction and key statistics

Although Ireland is larger in area than Luxembourg, Belgium, the Netherlands or Denmark, it is the smallest Member State of the European Union after Luxembourg in terms of population (3.5 million). Wholesale services therefore need to reach a small but widely-dispersed population.

In Irish statistics, wholesaling of motor vehicles (part of group 50.1 of NACE Rev. 1) is included in wholesale trade. Commission agents and intermediaries (group 51.1) are excluded from distribution in the Irish National Classification, and are treated as business services. Table IRL1 sets out a number of key statistics related to the Irish wholesale sector.

2. The role of trade in the Irish economy

In 1988, there were around 32 400 retail and wholesale enterprises and 350 intermediaries.

The trade sector is an important employer in Ireland. In 1995, its share in total employment was 15% (11.3% for retailing and 3.6% for wholesaling). Wholesale employment tended towards a net decline during the 1980s; in the 1990s, employment in the sector has kept pace with the general upward trend in total national employment. The distributive trade sector accounted for 9.3% of total gross value added, which was IEP 31 billion in 1994.

Tradable consumption represents about 67% of final household consumption. This leaves a low proportion for services and categories not channelled through the distribution sectors. The share of food, beverages and tobacco in household consumption is 35%.

3. Wholesale trade structure in Ireland: enterprises and local units

The distribution censuses carried out by the Irish Central Statistics Office (CSO) covered local units rather than enterprises. Enterprise estimates were then compiled from local unit data; however, in 1991 the CSO commenced a series of sample Annual Services Inquiries, which use the enterprise as the survey unit. All enterprise data given in this chapter are based on the 1994 Annual Services Inquiry, while local unit data are from the Censuses of Distribution.

Overall wholesale turnover amounted to IEP 11.6 billion in 1994, with an average turnover of around IEP 3.8 million per enterprise. Average sales were highest in the grocery sector (IEP 13.5 million), while the residual category 'all other non-food' was most significant in terms of numbers of enterprises, persons engaged and turnover. Most wholesale local units belonged to private limited companies (69%), while sole proprietorships (17%) and co-operatives (10%) were also significant.

From 1978 to 1988, the number of local units in wholesaling increased strongly, with an increase for total wholesaling of 29%. All categories experienced growth over the ten-year period, with hardware and electrical goods (+56%) and motor vehicles, non-agricultural machinery and accessories (+52%) registering the highest growth rates. This can be attributed to an increasing diversity of products and the growth of the computer hardware wholesaling sector. The total number of wholesale enterprises in 1988 was 3 014; the number of local units owned by these enterprises was 3 627 (leaving 345 units associated with non-wholesale enterprises). This gives an average of 1.2 units per enterprise.

In 1988, there were 11 wholesale units per 10 000 inhabitants in Ireland, with the Dublin Metropolitan region having the highest density of units (16 per 10 000). Table IRL10 gives some summary data for the Irish wholesale sector from the 1994 Annual Services Inquiry.

4. Employment in Irish wholesaling

Irish wholesaling has a high share of wage and salary earners, who account for 96% of the workforce. Employment in the sector tends to be full-time; 93% of employees were described as working 30 or more hours per week in 1994. Average earnings in wholesaling were IEP 17 064 in 1994, with the categories motor vehicles, non-agricultural machinery and accessories (IEP 19 388) and all other non-food (IEP 19 289) paying the highest average wages and salaries. This reflects the technical nature and scale of these types of wholesaling (computer hardware, oil and motor vehicle wholesaling, etc.).

5. Wholesale activity and turnover in Irish wholesaling

Table IRL7 gives information on changes in turnover (including VAT) for Irish wholesaling. The category motor vehicles, non-agricultural machinery and accessories recorded the highest growth in turnover in the period 1977 to 1994; this was caused by increasing car sales and the growth of computer hardware wholesaling. Grocery wholesaling registered the second highest growth in turnover over this period, owing to the increasing penetration of buyer and symbol groups in the sector. Wholesaling of agricultural machinery showed by far the smallest growth of all sectors, as agriculture has been steadily declining in importance in the Irish economy since the early 1960s.

The value of a commercial service, and ultimately the profitability of a wholesale activity can be determined from the gross margin. Gross margins have steadily increased in Irish wholesaling in the period 1977 to 1994, from 16.7% in 1977 to 19.5% in 1987 to 22.3% in 1994. Margins were quite comparable for most sectors over this period, with the exception of the 'other food, drink and tobacco' and 'all other non-food' categories. Both of these sectors showed growth of about 10 percentage points, reflecting the influence of large wholesale conglomerates with some manufacturing activities in both categories.

6. Concentration in Irish wholesaling

Concentration levels in the Irish wholesale sector are shown in Table IRL8. This table shows that turnover is far more concentrated than employment in Irish wholesaling, as the 224 enterprises with IEP 10 million or more in turnover account for 67% of turnover but only 40% of employment.

Table IRL1: Key statistics for wholesale trade, Ireland (1994)

	Value
Number of enterprises	3 029
Number of local units [1]	3 972
Total employment	44 440
Employees	42 734
Self-employed	1 706
Turnover (Mio IEP)	11 596
Gross margin (Mio IEP)	2 583
Gross margin per person employed (IEP)	58 116

[1] Data 1988.
Source: Central Statistics Office.

Table IRL2: The role of trade in the Irish economy (1994)

	Value	Share (%)
a) Number of distributive trade enterprises		
Total distributive trade enterprises	32 363	100.0
Wholesale trade	3 029	9.4
Food wholesaling	754	2.4
Other wholesaling	2 275	7.0
Retail trade	29 334	90.6
Food retailing	17 451	53.9
Other retailing	11 883	36.7
Commission trade	344	
b) Employment (1 000) [1]		
Total resident population	3 570.7	
Total employment	1 181.6	100.0
Persons employed in distributive trade	179.3	15.2
Wholesaling and intermediaries	42.1	3.6
Retail trade	137.2	11.6
c) Value added (Mio IEP)		
Gross domestic product	34 741	
Gross value added of all sectors	30 831	100.0
Gross value added of the distributive trade	2 853	9.3
d) Final household consumption (Mio IEP)		
Final household consumption	19 769	100.0
Food, drink	6 034	30.5
Tobacco	803	4.1
Clothing, footwear	1 308	6.6
Gross rent, fuel, power	2 363	12.0
Furniture, furnishings	1 285	6.5
Medical care and health expenses	806	4.1
Transport and telecommunications	2 697	13.6
Recreation, education	2 305	11.7
Miscellaneous goods and services	2 168	11.0
Tradable consumption	13 245	67.0
Non-tradable consumption	6 524	33.0

[1] Labour force survey.
Source: Central Statistics Office.

Table IRL3: Local units by legal status, Ireland (1988)

Legal status	Share (%)
Sole proprietorship	16.7
Partnership	2.3
Private limited company	69.4
Public limited company	1.6
Cooperative society and others	10.0
Total	**100.0**

Source: Central Statistics Office, 1988.

Table IRL4: Number of wholesale local units by activity, Ireland (1978 - 1988)

Activity	1978	1988
Grocery	191	200
Other food, beverages and tobacco	496	689
Clothing, footwear, photographic and optical goods	243	365
Builders materials	244	311
Hardware and electrical goods	169	263
Motor vehicles, non-agricultural machinery and accessories	371	563
Agricultural machinery	179	246
All other non-food	1 180	1 335
Total	**3 073**	**3 972**

Source: Central Statistics Office, 1978,1988.

Table IRL5: Geographical distribution of wholesale local units, Ireland (1988)

Regions	Population	Number of local units	Local units per 10 000 inhabitants
Leinster	1 860 037	2 214	11.9
of which-Dublin metropolitan	920 956	1 465	15.9
Munster	1 008 443	1 204	11.9
Connacht and Ulster (part of)	654 121	554	8.5
Total	**3 522 601**	**3 972**	**11.3**

Source: Central Statistics Office, 1988.

Table IRL6: Employment characteristics by activity in Irish wholesaling (1994)

Activity	Number of persons employed	Employees		Wages and salaries (IEP 1 000)
		Full-time	Part-time	
Grocery	4 645	4 136	437	70 781
Other food, beverages and tobacco	7 525	6 281	832	104 669
Clothing, footwear, photographic and optical goods	4 687	4 297	245	77 673
Building materials	4 900	4 488	225	70 138
Hardware and electrical goods	2 809	2 638	126	45 187
Motor vehicles, non-agricultural machinery and accessories	7 847	7 424	255	148 878
Agricultural machinery	1 180	1 022	24	13 118
All other non-food	10 847	9 666	639	198 776
Total	**44 440**	**39 952**	**2 783**	**729 220**

Source: Central Statistics Office.

Table IRL7: Wholesale turnover in Ireland by activity, Ireland (1977 - 1994)

Activity	Turnover (including VAT) - (IEP 1 000)		
	1977	1987	1994
Grocery	236 878	950 915	2 022 112
Other food, beverages and tobacco	473 372	1 255 044	2 230 068
Clothing, footwear, photographic and optical goods	172 147	582 871	1 097 758
Buildings materials	200 489	546 046	870 493
Hardware and electrical goods	134 651	394 747	629 914
Motor vehicles, non-agricultural machinery and accessories	232 822	1 341 962	2 159 786
Agricultural machinery	110 831	136 191	205 312
All other non-food	1 251 266	2 944 612	4 059 569
Total	**2 812 456**	**8 152 388**	**13 275 012**

Source: Central Statistics Office.

Table IRL8: Concentration by turnover category in Irish wholesaling (1994)

Turnover categories (1 000 IEP)	Cumulative number of enterprises (%)	Cumulative turnover (excluding VAT) (%)	Cumulative number of persons employed (%)
< 50	3.6	0.0	0.3
< 100	9.1	0.1	0.9
< 250	19.2	0.6	2.9
< 500	35.7	1.9	7.6
< 1 000	56.0	5.5	16.8
< 5 000	85.9	22.1	46.4
< 10 000	92.6	32.8	60.4
< 50 000	98.7	61.9	84.6
All categories	100.0	100.0	100.0

Source: Central Statistics Office.

Table IRL9: Gross margin as % of turnover by wholesale trade activity, Ireland (1977 - 1994)

Activity	Gross margin as % of turnover	
	1977	1994
Grocery	8.4	10.3
Other food, beverages and tobacco	15.3	25.6
Clothing, footwear, photographic and optical goods	23.7	29.1
Buildings materials	26.3	27.4
Hardware and electrical goods	21.6	23.4
Motor vehicles, non-agricultural machinery and accessories	23.5	23.3
Agricultural machinery	19.3	19.6
All other non-food	14.6	24.2
Total	**16.7**	**22.3**

Source: Central Statistics Office, 1977, 1994.

Table IRL10: Principal aggregates for wholesale enterprises, Ireland (1994)

Activity	Number of enterprises	Turnover (excluding VAT) (1 000 IEP)	Gross value added (1 000 IEP)	Capital acquisitions (1 000 IEP)	Wages and salaries (1 000 IEP)	Number of persons engaged
Grocery	134	1 804 213	133 373	11 521	70 781	4 645
Other food, beverages and tobacco	620	2 046 250	282 993	32 980	104 669	7 525
Clothing, footwear, photographic and optical goods	330	973 485	156 617	10 391	77 673	4 687
Building materials	250	728 680	143 840	10 637	70 138	4 900
Hardware and electrical goods	240	527 849	71 305	4 680	45 187	2 809
Motor vehicles, non-agricultural machinery and accessories	455	1 812 558	268 648	19 747	148 878	7 847
Agricultural machinery (including tractors)	174	172 926	22 640	2 207	13 118	1 180
All other non-food	826	3 530 538	431 528	66 355	198 776	10 847
Total	**3 029**	**11 596 499**	**1 510 944**	**158 518**	**729 220**	**44 440**

Source: Central Statistics Office.

ITALIA

1. Introduction

Between 1981 and 1995 wholesale trade in Italy expanded in some sectors and areas of the country and declined in others.

As a result of the reorganisation of Italian industry during the 1980s, which involved a move towards more specialised economic activity and a consequent contracting out of work that was not directly connected with actual production, there was a rise in the demand for business services between firms in manufacturing. This in turn promoted inter-industry wholesaling, especially in the areas of the country that in economic terms were more advanced and more dynamic.

While inter-industry wholesaling was expanding, however, there was a reduction of wholesaling in the distributive sector, that is the area of wholesaling that traditionally links producers and retailers, because some of its typical services were produced at the lower end of the chain by retail firms and even by consumers purchasing in bulk. The wholesale trade therefore had to cope with dwindling demand and the whole system began to contract. These trends were not uniform, because they affected wholesaling in the foodstuffs sector to a greater extent than that for non-food goods since the former is more typical of the organised retailing and distribution that drive such changes. In addition, not every area in the country was affected to the same extent by these events.

This situation can be observed only with difficulty, however, since wholesale distribution also includes a variety of enterprises which are not in fact involved in such activity.

Division 51 of NACE Rev. 1 defines wholesale and commission trade as including inter-industry and distributive wholesaling, and the rather different category of wholesale on a fee or contract basis (commission or intermediary trade)[1]. In Italy, commission trade seems to be expanding rapidly and in 1991 it accounted for about a third of all firms. The aggregate covering wholesale and commission trade is also affected by 'irregular' trading, that is firms classified to the sector that are included although they are involved wholly or in part in retail trading because it is easier legally to get a licence for wholesale trade than for retail trade. Moreover, some of the intermediaries may actually be small firms involved in retail trade. These aspects need to be borne in mind when considering the comments that follow.

2. Available official data on wholesale trade

Three data sources have been used to arrive at a picture of the organisation of wholesale trade in Italy. The first is represented by the ISTAT surveys 1981-1991 and contains a variety of information on the number of enterprises, local units and persons employed. The second comes from the Ministry of Industry and Trade[2] and updates the number of local units to 1995. The third source is ISTAT data on the profit-and-loss accounts of the firms in question and covers the years 1992, 1993 and 1994. However, the three sources do not provide the same breakdown by activity or geographic area and refer to different periods of time. They are not therefore fully compatible.

3. Wholesale trade: general features in the 1991 survey

In 1991 the wholesale sector accounted for 5-7% of the economy in terms of the number of enterprises, local units and persons employed. When wholesale and retail trade are taken together, their proportion of the whole economy is about a third for the number of enterprises and local units but only 16% by persons employed. Oh these totals for the distributive trade, a little over a fifth are wholesale enterprises and about a third are persons employed in wholesaling. The characteristic ratios, that is the number of local units per enterprise and the number of persons employed per local unit, confirm that the Italian economy is based on small enterprises and that their size in wholesale trade (and, even more so, retail trade) is smaller than for the economy as a whole (see Table I1).

In terms of legal status, sole proprietorships form the majority of wholesale enterprises (almost 60%) but companies are involved in wholesale trade to a

[1] From this sector it is also necessary to exclude trading enterprises which perform as a sales network for a single manufacturing enterprise, enterprises where distribution activities are closely interconnected with transport activities, and other cases analogous to the status of intermediary.

[2] For an explanation of this choice see 'Structural characteristics of the distributive system in Italy', Ministry of Industry and Trade, 1995.

substantially greater extent than in retail trade or in the economy in general. The predominance of sole proprietorships reflects the generally small size of enterprises (see Table I2).

Wholesale enterprises tend not to operate at multiple locations. Firms operating at regional or national level account for less than 2% of the total number of enterprises. There is no great difference between wholesale and retail trade in this respect. This, too, reflects a structure based on small enterprises (see Table I3).

There were a little more than 900 000 persons employed in the wholesale sector in 1991. Analysis by size of firm again shows that small enterprises are a feature of the sector. Enterprises with 1 or 2 persons employed account for 66% of all wholesaling enterprises. The wholesale sector does not differ fundamentally from retail trade or the economy as a whole in this respect, although the percentage is somewhat lower than for retailing and slightly less than for the economy as a whole (see Table I4).

Only a little over a quarter of the persons employed in the wholesale trade are female (28%). This is somewhat below the figure of 35% for the economy as a whole and well below the relatively high proportion of females employed in the retail trade (46%).

3.1. General characteristics of wholesale trade in the 1991 survey, analysed by activity and area

Wholesale trade in Italy in 1991 can be analysed for each type of product handled, by the size of enterprises, by the number of local units and by the number of persons employed.

In terms of the number of enterprises, intermediaries (or commission agents) are ahead of the inter-industry and pure distribution sectors. However, they have a ratio of local units to enterprises which is very close to unity, indicating a structure based on small firms. Intermediaries account for more than 40% of local units but have a low percentage of persons employed. The distribution sub-sector within wholesaling, with a third of sales outlets, accounts for nearly half of all employees (see Table I5 and I7).

The bulk (a little over 60%) of enterprises, local units and persons employed are in the north with the remainder divided fairly equally between central and southern Italy. The process of modernisation of trade is more advanced in the north-west than elsewhere: the share of outlets is lower than that of persons employed, indicating larger local units (see Table I6).

4. Structural change in the sector, 1981-1991 and analysis by sector of trade

The snapshot of the sector described above requires comment in the light of the process which has brought the wholesale trade to its present situation. According to the censuses of 1981 and 1991, the wholesale trade has developed overall at a mean annual rate ranging from 1.7% to 1.9% for the number of enterprises, local units and persons employed.
The mean annual rates of growth of the three branches have, however, differed somewhat with those for intermediaries significantly higher (in the range 2.4% to 2.7%) than for inter-industry trade and distribution. The characteristic ratios (local units per enterprise and employees per local unit) have not changed greatly over the period 1981 to 1991. The ratio of local units to enterprises has remained virtually stable and close to unity over the decade, moving from 1.08 to 1.09 (see Table I7).

In inter-industry trade the number of local units per enterprise is higher than in wholesaling in general, and the ratio of persons employed to local units is higher in this and in the distributive branch (see Table I7).

To sum up, wholesale trade has expanded, and intermediary or commission trade has grown more than the other two branches; however there has been no fundamental change in the shape of wholesaling in terms of the three main variables considered here (see Table I8).

However, this analysis has been repeated excluding enterprises with only 1 or 2 persons employed, that is very small enterprises where there is a higher probability that they are on the margin of wholesaling or otherwise doubtful cases. This approach reflects the warnings on data quality given in the introduction.

This alternative analysis shows a total mean annual growth for local units (and employees) smaller than that for wholesale by all sizes of enterprises. This indicates that the wholesale system has expanded most in the form of smaller units. In the restricted analysis, also, the commission trade has grown slightly faster than the other two branches. But a clear difference is also apparent: the mean annual growth of local units in inter-industry trade in the more limited population exceeds both the total for all wholesaling (2.0% against 1.8%) and the corresponding figure (1.9%) for all enterprises. This means that the wholesale trade other than small enterprises is also expanding faster than average in the inter-industry branch (see Table I9).

The distribution branch of wholesale trade, however, has a rate of growth below the total for all wholesaling for the restricted class of enterprises (1.4% against 1.8%) and below that for all wholesaling of all enterprises (1.9%).

It is interesting to compare the percentage shares of each branch of wholesaling excluding the smallest enterprises with the corresponding total for the sector, and see how those shares have varied over the decade. Only in the inter-industry branch did the figures change significantly between 1981 and 1991 with increases in the proportions of enterprises and local units covered by the restricted range of enterprises (see Table I10).

4.1. Trends in the sector 1981-1991, by branch and geographical area

An analysis of trends in wholesaling by branch and geographical area shows that the growth in the number of local units and persons employed has been faster in the centre and south of Italy, that the ratio of employees to local units is rising slightly in the north-east, is stable in the north-west, and is falling in the centre and the south (see Table I11).

Analysis of the mean annual growth rate of local units by trade branch shows increases above the national average for the intermediary category in the centre and south, for inter-industry in the north-east and centre, and for the distribution category in the centre and still more in the south. On the other hand, in the north-west growth has been below the national average.

The steep rise in the commission trade in the centre and the south can be put down to the fragmented state of the corresponding retail system, which obliged many producers of mass market goods (such as groceries) to resort to intermediaries to reach the dispersed sales outlets. Industrial enterprises thus chose to rely on intermediaries, forcing them into a role of an indirect sales network since they had shown greater flexibility in the face of the local situation of retailers buying in small quantities for distribution over large geographical areas, with lower overheads than a direct sales network.

The growth of the inter-industry branch in the north-east and the centre can be attributed to the growing specialisation in the branch - which has made it more attractive to draw on its services - and also in industrial enterprises (see introduction). Together these factors have resulted in increased demand for wholesale trade services between enterprises. The slower growth in the north-west reflects the fact that in this area the process was already more advanced; for the opposite reason it could take off soon in the south.

Finally, the sharp increase in distributive wholesaling in the centre and south may be driven by the smaller presence of major distribution chains as this is one of the factors known to slow down or reduce wholesaling. The contrary argument naturally applies in the north.

This branch and area analysis was repeated on enterprises with three or more persons employed. This shows that, as far as the number of local units is concerned, the mean annual growths in the north-west and north-east of the restricted population of enterprises are greater than the corresponding rates for all enterprises but the converse is true of the centre and the south. This therefore reverses the position shown for all enterprises. In the unrestricted analysis it is the south and centre which are showing growth; in the analysis excluding the smallest units it is the two northern areas (see Table I12).

Intermediaries in the north also record mean annual growth rates in the second analysis greater than their unrestricted counterparts. This suggests that intermediaries are more widespread than is generally believed, not easily run as marginal activities, and in the economically strong regions require a certain size if they are to be run adequately. The inter-industry branch is growing most in the north, including the north-west, which did not show particularly strong growth on the unrestricted analysis. It appears that the process of change towards a services-based economy is not yet fully mature in this area inasmuch as it requires the logistics of larger-than-micro enterprises. The distributive branch shows low values in all four areas. This may be because demand is low: in the northern areas because of the ongoing process of substitution between wholesale and retail, and in the centre and south because these areas do not yet meet the requirements of a services supply side driven by larger enterprises.

The two analyses can be summarised by the construction of two matrices showing the (simple) correlations or relationships between the growths of the three branches on the restricted and unrestricted bases (see Table I13).

These tables point to very clear conclusions: taking all enterprises, the growth of inter-industry enterprises is negatively correlated with that of intermediaries. This link becomes even clearer when we consider only enterprises with three or more persons employed. There is also slight negative correlation between growth of the inter-industry and distributive branches (on the restricted analysis), a positive correlation between inter-industry and total growth rates and a weaker one between the other two branches and the total.

One possible explanation of the inverse correlation between growth rates of intermediaries and inter-industry wholesalers is drawn from the previous arguments of the study: the development of inter-industry trade is the result of a strengthening of the economic fabric in general. Proof of this can be seen in the fact that the inter-industry branch, once the small enterprises have been filtered out is developing in the economically strong areas of the country, whilst the reverse process can be seen for intermediaries: when all sizes of enterprises are considered there is growth in the south - which is economically weak vis-à-vis the north. Hence the negative correlation.

By analogy, if this hypothesis holds good (and it should) it comes as no surprise that the growth of inter-industry wholesaling should be strongest in the most developed regions. Thus, if we consider only the enterprises with three employees or more, the correlation between the growths of inter-industry and of distributive wholesaling changes its sign. Moreover, the total for the sector is closer to the inter-industry figure, and less like that of the other two branches. As is already known, economic growth (development of the inter-industry element) generally leads to a reduction in distributive wholesaling.

To sum up, over the decade the wholesale trade has grown generally with, in specific areas, developments of particular interest, whilst in others there seem to remain elements of backwardness and marginalisation. In the North and centre of Italy, and for enterprises above a minimum size, there has emerged a trend towards growth of inter-industry wholesaling, positive trend in intermediary wholesaling and stability in distributive wholesaling. The reverse has been happening in the south, alongside the sound reasons for growth in intermediary trade, we can note their very vigorous growth, far-from-outstanding performances by the inter-industry branch and trends in the distributive branch which leave room for doubt as to the quality of the current development process.

5. 1995 update on sales outlets

The Ministry of Industry and Trade updates its data each year, and this provides a more recent view of the evolution of wholesale trade. The Ministry publishes data on the number of wholesale local units excluding intermediaries: in other words, an aggregate of the inter-industry and distributive branches, which is also divided between wholesaling in food and non-food goods (see Table I14).

These results show that the wholesale trade changed direction between the two periods under review. In the second period, growth is consistently negative, and the slump is fairly well balanced between food and non-food activity. In the north, and in the food trade, the mean annual growths for 1981-91 are smaller, and the slump of 1991-95 more pronounced; the south showed the smallest fall in 1991-95 in absolute value. Even given the difficulties in interpreting the aggregate, which covers two somewhat different branches, it seems that certain parts of the sector are going through a difficult period, particularly those in the north and those in the food branch, and that this fits with the interpretation set out here: in the economically stronger areas, where the structure of trade is mainly based on modern distribution methods (major retailers and organised distribution) the traditional functions of wholesaling (for example, marketing, storage, transport and trade credit) are less in demand, and the sector is reducing in size. Further, since trade is strongly influenced by demand, it may be argued that the rise in consumption of the 1980s increased the demand for retail commercial services and consequently the demand for wholesale, whilst in the 1990s the reversal of the economic cycle has changed the direction of the trend.

6. The modern distributive typology of wholesale trade

The Italian wholesale distribution system includes a number of recent and less recent types of distribution. Alongside purchasing consortia and voluntary associations which, though not particularly recent, do not have yet a strong presence in the country, there are the new formats spreading across the country - wholesale trade centres and cash and carry outlets.
A 1995 survey by the Ministry of Industry and Trade identified 22 wholesale trade centres. Of the total, 14 are in the non-food sector, and the remainder deal in foods. Most of the centres are in the north, particularly in the food sector (7 out of 8). The centres

average 208 000 m^2 in area but vary widely in size and the number of enterprises contained (see Table I15 and I16).

Cash and carry outlets are more numerous in the north. The dynamics of this type of operation remain fairly stable: in 1987 there were 294 units, virtually the same as in 1995. In recent years their number have fallen in the north and grown in the south. All this confirms the hypothesis on the processes currently under way: in the north of the country the trend is towards a reduction in the demand for wholesale services, meaning that the enterprises remaining in the market must increase their competitiveness by increasing their sales area; in the south, on the other hand, a process of modernisation is beginning which takes account of the local situation to which enterprises of this type are clearly suited (enterprises less prone to association, and thus benefiting from this type of distribution) (see Table I17).

7. Revenue and expenditure accounts of wholesale enterprises

The economic accounts of wholesale enterprises form another source of data although not directly comparable with the earlier material. The analyses are disaggregated into five rather than four geographical areas, with southern Italy subdivided into southern mainland Italy and the islands (Sicily and Sardinia). Enterprises are divided into three classes: 1-9 persons employed, 10-19 persons employed and 20 or more persons employed; the wholesale trade is not disaggregated into branches; finally, data are available for 1992, 1993 and 1994 (the last two years' being provisional data).

The results of the analyses of the accounts for enterprises with 1 to 9 persons employed show that the northern areas perform better than the others: value added and investment per capita are higher, as are gross margin and the proportion of value added on turnover (see Table I18).

Repeating this analysis for enterprises with 10-19 persons employed tends to confirm the position and shows that in the economically stronger areas wholesale enterprises also produce results consistent with the economic environment in which they trade.

Finally, the analysis was carried out for enterprises with 20 or more persons employed. (As these are often multi-location firms, it was not possible to create valid geographical analyses from their centralised balance sheets).

As can be seen from table 19 the ratios are higher than those for the smaller enterprises. This confirms that the sector is developing since there are different levels of efficiency associated with different sizes of enterprise and with the degree of economic development of the geographical areas involved.

7.1. Concentration of wholesale trade

The basic accounts data were processed once again to measure the degree of concentration in the sector. using the data for 1992, 1993 and 1994 in aggregate. The wholesale trade seems somewhat concentrated, with around 94% of enterprises (1-9 persons employed) responsible for 33% of turnover, and the next 4% (10-19 employees) generating 16% of turnover and the remaining 2% (20 and more employees) taking around 50% of turnover. Concentration ratio (Lorenz curve) is equal, during the three years, to 0.62 (see Table I20).

Table I1: Structural characteristics of distributive trade, Italy (1991)

	Total economy	Wholesale and commission trade	Retail trade
Number (1 000)			
enterprises	3 298	236	871
local units	3 864	257	938
persons employed	17 830	903	1 913
women	6 272	257	886
Total economy (share %)			
enterprises	100	7	26
local units	100	7	24
persons employed	100	5	11
Distributive trade (share %)			
enterprises	-	21	79
local units	-	22	78
persons employed	-	32	68
Characteristic ratios			
local units/enterprise	1.2	1.1	1.1
persons employed/ local unit	4.6	3.5	2.0

Source: ISTAT, compiled from 1991 survey data.

Table I2: Legal status of distributive trade enterprises, Italy (1991)

	Total	Sole proprietorships	Companies	Other
	Share (%)			
Wholesale and commission trade	100.0	59.4	40.4	0.2
Retail trade	100.0	80.9	18.9	0.2
Total economy	100.0	71.7	27.5	0.8

Source: ISTAT, compiled from 1991 survey data.

Table I3: Geographical distribution of operations of distributive trade enterprises, Italy (1991)

	Extent of operation of enterprises			
	Share (%)			
	Total	Sub-regional	Regional	National
Wholesale and commission trade	100.0	98.2	0.7	1.1
Retail trade	100.0	99.5	0.3	0.2
Total economy	100.0	99.0	0.5	0.5

Source: ISTAT, compiled from 1991 survey data.

Table I4: Distributive trade enterprises by number of persons employed, Italy (1991)

	Enterprises by number of persons employed						
	Share (%)						
	Total	1	2	3-5	6-9	10-19	20 or more
Wholesale and commission trade	100.0	48.6	17.5	20.0	7.4	4.5	2.1
Retail trade	100.0	52.0	28.4	15.8	2.5	0.9	0.3
Total economy	100.0	48.0	21.8	18.7	5.6	3.7	2.2

Source: ISTAT, compiled from 1991 survey data.

Table I5: Number of enterprises, local units and persons employed in wholesale and commission trade by activity, Italy (1991)

Activity	Enterprises		Local units		Persons employed	
	Number (1 000)	Share (%)	Number (1 000)	Share (%)	Number (1 000)	Share (%)
Intermediaries [1]	106	45.0	109	42.4	170	18.8
Inter-industry [2]	53	22.6	61	23.9	296	32.8
Distribution [3]	76	32.4	86	33.7	437	48.4
Total	236	100.0	256	100.0	903	100.0

[1] Corrisponds to NACE Rev. 1 group 51.1.
[2] Corrisponds to NACE Rev. 1 groups 51.2+51.5+51.6.
[3] Corrisponds to NACE Rev. 1 groups 51.3+51.4+51.7.
Source: ISTAT, compiled from 1991 survey data.

Table I6: Numbers of enterprises, local units and persons employed in wholesale and commission trade by geographical area, Italy (1991)

	Enterprises		Local units		Persons employed	
	Number (1 000)	Share (%)	Number (1 000)	Share (%)	Number (1 000)	Share (%)
North-West Italy [1]	78	33.3	85	33.1	334	37.0
North-East Italy [2]	66	28.2	72	27.9	232	25.7
Central Italy [3]	45	19.2	49	19.3	165	18.3
Southern Italy [4]	45	19.4	50	19.6	172	19.0
Italy	236	100.0	256	100.0	903	100.0

[1] Comprises Val d'Aosta, Piemonte, Liguria and Lombardy.
[2] Comprises Veneto, Trentino Alto Adige, Friuli and Emilia-Romagna.
[3] Comprises Tuscany, Marche, Umbria and Lazio.
[4] Comprises Abruzzo, Molise, Campania, Puglia, Basilicata, Calabria, Sicily and Sardinia.
Source: ISTAT, compiled from 1991 survey data.

Table I7: Average annual growth rate and characteristic ratios of the number of wholesale and commission trade enterprises by sector of activity, Italy (1981 - 1991)

Activity	Enterprises	Local units	Persons employed	Local units per enterprise		Persons employed per local unit	
	Average annual growth rate (%)						
	1991/81			1981	1991	1981	1991
Intermediaries	2.4	2.6	2.7	1.01	1.03	1.5	1.6
Inter-industry	1.5	1.5	1.4	1.16	1.15	4.8	4.8
Distribution	1.3	1.5	1.6	1.11	1.13	5.0	5.1
Total	**1.8**	**1.9**	**1.7**	**1.08**	**1.09**	**3.6**	**3.5**

Note: Types of activity are defined in the note to Table 5.
Source: compiled from ISTAT survey data.

Table I8: Enterprises, local units and persons employed in wholesale and commission trade, Italy (1981 - 1991)

Activity	Census 1981			Census 1991		
	Enterprises	Local units	Persons employed	Enterprises	Local units	Persons employed
	Share (%)			Share (%)		
Intermediaries	42.5	39.8	17.1	45.0	42.4	18.8
Inter-industry	23.3	24.9	33.7	22.6	23.9	32.8
Distribution	34.2	35.3	49.2	32.4	33.7	48.4
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Note: Types of activity are defined in the note to Table 5.
Source: compiled from ISTAT survey data.

Table I9: Average annual growth rate and characteristic ratios of wholesale and commission trade enterprises, with 3 or more persons employed, by activity, Italy (1981 - 1991)

Activity	Enterprises	Local units	Persons employed	Local units per enterprise		Persons employed per local unit	
	Average annual growth rate (%)						
	1991/81			1981	1991	1981	1991
Intermediaries	2.6	2.9	3.0	1.03	1.06	4.9	4.9
Inter-industry	2.4	2.0	1.5	1.20	1.15	8.6	8.2
Distribution	1.5	1.4	1.7	1.14	1.13	8.5	8.6
Total	**2.0**	**1.8**	**1.7**	**1.14**	**1.13**	**8.1**	**8.0**

Note: Types of activity are defined in the note to Table 5.
Source: compiled from ISTAT survey data.

Table I10: Wholesale and commission trade: enterprises, with 3 or more persons employed, by activity, Italy (1981 - 1991)

Activity	Enterprises	Local units	Persons employed	Enterprises	Local units	Persons employed
	Share (%)			Share (%)		
	1981			1991		
Intermediaries	10.1	10.3	32.5	10.3	10.6	33.6
Inter-industry	46.1	47.8	84.9	50.4	50.4	85.4
Distribution	49.5	50.5	85.8	50.3	50.3	86.0
Total	**31.9**	**33.8**	**76.4**	**32.3**	**33.5**	**76.0**

Note: Types of activity are defined in the note to Table 5.
Source: compiled from ISTAT survey data.

Table I11: Average annual growth rate and characteristic ratios of wholesale and commission trade enterprises by activity and by geographical area, Italy (1981 - 1991)

		Enterprises	Local units	Persons employed	Local units per enterprise		Persons employed per local unit	
		Average annual growth rate (%)						
		1991/81			1981	1991	1981	1991
North-West Italy	Intermediaries	2.0	2.2	2.4	1.01	1.02	1.6	1.6
	Inter-industry	1.1	1.1	1.3	1.14	1.14	5.5	5.6
	Distribution	0.9	1.1	1.4	1.11	1.13	5.4	5.6
	Total	1.4	1.5	1.5	1.08	1.09	3.9	3.9
North-East Italy	Intermediaries	1.1	1.2	1.6	1.01	1.02	1.3	1.4
	Inter-industry	1.8	1.9	2.0	1.16	1.16	4.5	4.6
	Distribution	1.0	1.2	1.6	1.11	1.13	5.2	5.4
	Total	1.2	1.3	1.7	1.07	1.08	3.1	3.2
Central Italy	Intermediaries	3.8	3.9	3.3	1.01	1.03	1.7	1.6
	Inter-industry	2.0	1.9	1.7	1.19	1.18	4.9	4.8
	Distribution	1.7	1.8	1.5	1.14	1.15	4.9	4.8
	Total	2.7	2.7	1.9	1.10	1.10	3.6	3.3
Southern Italy	Intermediaries	5.3	5.5	4.9	1.02	1.04	2.0	1.9
	Inter-industry	1.4	1.4	0.6	1.15	1.14	4.0	3.7
	Distribution	1.8	2.0	1.8	1.10	1.12	4.4	4.3
	Total	2.7	2.8	1.9	1.09	1.10	3.7	3.4

Note: Types of activity are defined in the note to Table 5.
Geographical aggregations are defined in the note to Table 6.
Source: ISTAT, compiled from 1981 and 1991 survey data.

Table I12: Average annual growth rate and characteristic ratios of wholesale and commission trade enterprises with 3 or more persons employed by activity and by geographical area, Italy (1981 - 1991)

		Enterprises	Local units	Persons employed	Local units per enterprise		Persons employed per local unit	
		Average annual growth rate (%)						
		1991/81			1981	1991	1981	1991
North-West Italy	Intermediaries	2.1	2.4	3.0	1.03	1.06	5.1	5.4
	Inter-industry	2.3	1.9	1.5	1.17	1.13	9.6	9.2
	Distribution	1.1	1.1	1.5	1.13	1.13	9.1	9.4
	Total	1.7	1.6	1.6	1.13	1.12	8.8	8.8
North-East Italy	Intermediaries	2.8	3.1	3.2	1.03	1.07	4.5	4.6
	Inter-industry	2.9	2.5	2.2	1.21	1.16	7.9	7.7
	Distribution	1.5	1.4	1.7	1.14	1.13	9.0	9.2
	Total	2.2	2.0	2.0	1.15	1.13	8.1	8.1
Central Italy	Intermediaries	1.6	2.0	1.9	1.03	1.07	4.8	4.7
	Inter-industry	2.8	2.2	1.7	1.25	1.18	8.6	8.2
	Distribution	1.8	1.7	1.4	1.16	1.15	8.0	7.8
	Total	2.1	1.9	1.6	1.17	1.15	7.7	7.5
Southern Italy	Intermediaries	4.2	4.5	4.1	1.02	1.05	4.9	4.8
	Inter-industry	1.7	1.2	0.3	1.20	1.15	7.4	6.7
	Distribution	1.6	1.6	1.7	1.13	1.12	7.7	7.7
	Total	2.0	1.9	1.5	1.13	1.12	7.3	7.0

Note: Types of activity are defined in the note to Table 5.
Geographical aggregations are defined in the note to Table 6.
Source: ISTAT, compiled from 1981 and 1991 survey data.

Table I13: Correlation of growth in number of wholesale and commission trade local units, Italy (1991)

Activity	Total enterprises				Enterprises with 3 or more persons employed			
	Intermediaries	Inter-industry	Distribution	Total	Intermediaries	Inter-industry	Distribution	Total
Intermediaries	1.00	-0.15	0.94	0.94	1.00	-0.71	0.24	0.24
Inter-industry		1.00	0.20	0.12		1.00	-0.14	0.35
Distribution			1.00	0.98			1.00	0.69
Total				**1.00**				**1.00**

Note: Geographical aggregations are defined in the note to Table 6.
Source: Tables 11-12 above, data on mean annual growth of sales local units.

Table I14: Average annual growth rate of wholesale and commission trade local units, Italy (1981 - 1995)

		Average annual growth rate (%)	
		1991/81	1995/91
North Italy	food	0.0	-6.1
	non-food	2.2	-7.6
	total	1.5	-7.1
Central Italy	food	1.6	-3.9
	non-food	2.5	-3.7
	total	2.2	-3.8
Southern Italy	food	1.9	-4.0
	non-food	2.5	-1.9
	total	2.2	-2.8
Total Italy	food	0.8	-4.9
	non-food	1.9	-4.7
	total	1.5	-4.8

Note: Geographical aggregations are defined in the note to Table 6.
Source: compiled from the Ministry of Industry and Trade.

Table I15: Wholesale trade centres: distribution, Italy (1995)

	Total			Food and mixed centres			Non-food centres		
	Number of centres	Area (1 000 m²)	Number of enterprises	Number of centres	Area (1 000 m²)	Number of enterprises	Number of centres	Area (1 000 m²)	Number of enterprises
North-West Italy	4	455	268	1	40	10	3	415	258
North-East Italy	11	1 949	647	6	1 510	525	5	439	122
Central Italy	4	377	121	1	38	16	3	339	105
Southern Italy	3	1 791	609	0	0	0	3	1 791	609
Total Italy	22	4 571	1 645	8	1 588	551	14	2 984	1 094

Note: Geographical aggregations are defined in the note to Table 6.
Source: compiled from the Ministry of Industry and Trade.

Table I16: Wholesale trade centres: characteristic ratios, Italy (1995)

	Total		Food and mixed centres		Non-food centres	
	Average area (1 000 m²)	Enterprise per centre	Average area (1 000 m²)	Enterprise per centre	Average area (1 000 m²)	Enterprise per centre
North-West Italy	114	67	40	10	138	86
North-East Italy	177	59	252	88	88	24
Central Italy	94	30	38	16	113	35
Southern Italy	597	203	0	0	597	203
Total Italy	208	75	198	69	213	78

Note: Geographical aggregations are defined in the note to Table 6.
Source: compiled from the Ministry of Industry and Trade.

Table I17: Cash and carry: distribution and ratios, Italy (1995)

	Number	Area			Average area per cash & carry (1 000 m²)
		Total (1 000 m²)	Food (1 000 m²)	Non-food (1 000 m²)	
North-West Italy	79	361	241	120	4.6
North-East Italy	83	287	183	104	3.4
Central Italy	62	225	148	77	3.6
Southern Italy	69	216	137	79	3.1
Total Italy	293	1 089	709	379	3.7

Note: Geographical aggregations are defined in the note to Table 6.
Source: compiled from data of the Ministry of Industry and Trade.

Table I18: Value added, investment and gross margin in wholesale and commission trade enterprises with 1-9 persons employed - annual average, Italy (1992 - 1994)

	Enterprises with 1-9 persons employed			
	Value added per person employed	Fixed investment per person employed	Gross margin	Value added on turnover
	(Mio ITL)		(%)	
North-West Italy	55.0	5.3	28.9	18.7
North-East Italy	54.8	7.2	25.0	19.7
Central Italy	46.8	6.9	21.4	14.5
Southern Italy [1]	46.2	7.7	8.2	12.3
Sicily and Sardinia	40.8	4.8	17.6	13.9
Total Italy	51.0	6.4	21.6	16.6

[1] Excluding Sicily and Sardinia.
Note: Geographical aggregations are defined in the note to Table 6.
Source: ISTAT, compiled from 1991 survey data.

Table I19: Value added, investment and gross margin in wholesale and commission trade enterprises with more than 10 persons employed - annual average, Italy (1992 - 1994)

	Enterprises with 10-19 persons employed				Enterprises with 20 or more persons employed			
	Value added per person employed	Fixed investment per person employed	Gross margin	Value added on turnover	Value added per person employed	Fixed investments per person employed	Gross margin	Value added on turnover
	(Mio ITL)		(%)		(Mio ITL)		(%)	
North-West Italy	79.8	7.5	27.6	14.6	:	:	:	:
North-East Italy	78.4	8.6	20.9	12.8	:	:	:	:
Central Italy	72.6	6.4	21.6	13.3	:	:	:	:
Southern Italy [1]	78.3	5.3	20.1	13.8	:	:	:	:
Sicily and Sardinia	53.0	3.8	20.4	13.0	:	:	:	:
Total Italy	76.2	7.1	23.2	13.6	103.2	10.0	28.0	10.1

[1] Excluding Sicily and Sardinia.
Note: Geographical aggregations are defined in the note to Table 6.
Source: ISTAT, compiled from 1991 survey data.

Table I20: Wholesale and commission trade enterprises - average values of the means, Italy (1992 - 1994)

Persons employed size-class	Enterprises			Turnover		
	Number of enterprises	Share (%)	Cumulative share (%)	Value (Mio ITL)	Share (%)	Cumulative share (%)
1-9	220 012	93.6	93.6	155 895	33.4	33.4
10-19	10 451	4.4	98.0	77 448	16.6	50.0
≥ 20	4 585	2.0	100.0	232 871	50.0	100.0
Total	235 047	100.0	-	466 214	100.0	-

Source: compiled from ISTAT data.

LUXEMBOURG

Table L1: Key statistics for wholesale and commission trade, Luxembourg (1994) [1]

	Value	Share (%)
Number of enterprises	1 984	
Number of persons employed	11 211	100.0
Employees	10 493	93.6
Self-employed	718	6.4
Turnover (Mio LUF)	259 827	
Turnover per person employed (Mio LUF)	23.18	
Gross production (Mio LUF)	44 917	
GP as % of turnover (gross margin)		16.9
Intermediate consumption (Mio LUF)	18 200	
as % of GP		41.4
Gross value added at market prices (Mio LUF)	26 719	
as % of GP		60.8
Gross value added per person employed (Mio LUF)	2.38	
Personnel costs (Mio LUF)	12 328	
% of gross value added		46.1
Personnel costs per person employed (Mio LUF)	1.10	

[1] Provisional figures.
Source: Service Central de la Statistique et des Etudes Economiques (STATEC).

Table L2: Number of enterprises in wholesale and commission trade by activity, Luxembourg (1990 - 1994[1])

Activity	Enterprises						Growth (%)	Average annual growth rate (%)
	Number			Share (%)				
	1990	1993	1994 [1]	1990	1993	1994 [1]	1994/90	1994/90
Agricultural raw materials and food	**313**	**332**	**329**	**18.0**	**16.3**	**16.6**	**5.1**	**1.3**
Agricultural raw materials	92	86	93	5.3	4.2	4.7	1.1	0.3
Food, beverages and tobacco	221	246	236	12.7	12.1	11.9	6.8	1.7
Non-food household products	**233**	**284**	**277**	**13.4**	**13.9**	**14.0**	**18.9**	**4.4**
Textiles, clothing and footwear	52	69	66	3.0	3.4	3.3	26.9	6.1
Equipment for professional or domestic use	100	111	105	5.8	5.4	5.3	5.0	1.2
Pharmaceutical and medical goods, cosmetics and cleaning materials	81	104	106	4.7	5.1	5.3	30.9	7.0
Intermediate products and machinery	**810**	**951**	**909**	**46.7**	**46.6**	**45.8**	**12.2**	**2.9**
Non-agricultural intermediate products	342	378	356	19.7	18.5	17.9	4.1	1.0
Energy products and miscellaneous ores and minerals	96	117	115	5.5	5.7	5.8	19.8	4.6
Raw materials and intermediate products	210	224	203	12.1	11.0	10.2	-3.3	-0.8
Other products	36	37	38	2.1	1.8	1.9	5.6	1.4
Industrial machinery and equipment	468	573	553	27.0	28.1	27.9	18.2	4.3
Other wholesale	**181**	**232**	**223**	**10.4**	**11.4**	**11.2**	**23.2**	**5.4**
Commission trade	**199**	**241**	**247**	**11.5**	**11.8**	**12.4**	**24.1**	**5.6**
Total	**1 736**	**2 040**	**1 985**	**100.0**	**100.0**	**100.0**	**14.3**	**3.4**

[1] Provisional figures.

Source: Service Central de la Statistique et des Etudes Economiques (STATEC).

Table L3: Total persons employed in wholesale and commission trade enterprises, Luxembourg (1990 - 1994[1])

Activity	Persons employed						Growth (%)	Average annual growth rate(%)
	Number			Share (%)				
	1990	1993	1994 [1]	1990	1993	1994 [1]	1994/90	1994/90
Agricultural raw materials and food	**2 712**	**2 884**	**2 896**	**25.2**	**25.7**	**25.8**	**6.8**	**1.7**
Agricultural raw materials	417	381	400	3.9	3.4	3.6	-4.1	-1.0
Food, beverages and tobacco	2 295	2 503	2 496	21.3	22.3	22.3	8.8	2.1
Non-food household products	**1 456**	**1 436**	**1 456**	**13.5**	**12.8**	**13.0**	**0.0**	**0.0**
Textiles, clothing and footwear	120	116	137	1.1	1.0	1.2	14.2	3.4
Equipment for professional or domestic use	762	755	757	7.1	6.7	6.8	-0.7	-0.2
Pharmaceutical and medical goods, cosmetics and cleaning materials	574	565	562	5.3	5.0	5.0	-2.1	-0.5
Intermediate products and machinery	**5 453**	**5 781**	**5 658**	**50.7**	**51.4**	**50.5**	**3.8**	**0.9**
Non-agricultural intermediate products	2 297	2 503	2 420	21.4	22.3	21.6	5.4	1.3
Energy products and miscellaneous ores and minerals	631	634	583	5.9	5.6	5.2	-7.6	-2.0
Raw materials and intermediate products	1 394	1 615	1 556	13.0	14.4	13.9	11.6	2.8
Other products	272	254	281	2.5	2.3	2.5	3.3	0.8
Industrial machinery and equipment	3 156	3 278	3 238	29.4	29.2	28.9	2.6	0.6
Other wholesale	**655**	**695**	**727**	**6.1**	**6.2**	**6.5**	**11.0**	**2.6**
Commission trade	**474**	**447**	**474**	**4.4**	**4.0**	**4.2**	**0.0**	**0.0**
Total	**10 750**	**11 243**	**11 211**	**100.0**	**100.0**	**100.0**	**4.3**	**1.1**

[1] Provisional figures.
Source: Service Central de la Statistique et des Etudes Economiques (STATEC).

Table L4: Number of employees in wholesale and commission trade enterprises, Luxembourg (1990 - 1994[1])

Activity	Employees						Growth (%)	Average annual growth rate (%)
	Number			Share (%)				
	1990	1993	1994 [1]	1990	1993	1994 [1]	1994/90	1994/90
Agricultural raw materials and food	**2 550**	**2 761**	**2 761**	**25.9**	**26.2**	**26.3**	**8.3**	**2.0**
Agricultural raw materials	350	332	332	3.6	3.1	3.2	-5.1	-1.3
Food, beverages and tobacco	2 200	2 429	2 429	22.4	23.0	23.1	10.4	2.5
Non-food household products	**1 354**	**1 365**	**1 380**	**13.8**	**12.9**	**13.2**	**1.9**	**0.5**
Textiles, clothing and footwear	90	87	102	0.9	0.8	1.0	13.3	3.2
Equipment for professional or domestic use	732	737	738	7.4	7.0	7.0	0.8	0.2
Pharmaceutical and medical goods, cosmetics and cleaning materials	532	541	540	5.4	5.1	5.1	1.5	0.4
Intermediate products and machinery	**5 049**	**5 444**	**5 330**	**51.3**	**51.6**	**50.8**	**5.6**	**1.4**
Non-agricultural intermediate products	2 148	2 395	2 315	21.8	22.7	22.1	7.8	1.9
Energy products and miscellaneous ores and minerals	609	614	564	6.2	5.8	5.4	-7.4	-1.9
Raw materials and intermediate products	1 294	1 551	1 493	13.2	14.7	14.2	15.4	3.6
Other products	245	230	258	2.5	2.2	2.5	5.3	1.3
Industrial machinery and equipment	2 901	3 049	3 015	29.5	28.9	28.7	3.9	1.0
Other wholesale	**560**	**630**	**670**	**5.7**	**6.0**	**6.4**	**19.6**	**4.6**
Commission trade	**327**	**344**	**352**	**3.3**	**3.3**	**3.4**	**7.6**	**1.9**
Total	**9 840**	**10 544**	**10 493**	**100.0**	**100.0**	**100.0**	**6.6**	**1.6**

[1] Provisional figures.
Source: Service Central de la Statistique et des Etudes Economiques (STATEC).

Table L5: Employment in wholesale and commission trade enterprises, Luxembourg (1994) [1]

Activity	Enterprises	Persons employed						Persons employed per enterprise
		Total		Employees		Self employed		
	Number	Number	Share (%)	Number	Share (%)	Number	Share (%)	
Agricultural raw materials and food	**328**	**2 896**	**25.8**	**2 761**	**26.3**	**135**	**18.8**	**8.8**
Agricultural raw materials	92	400	3.6	332	3.2	68	9.5	4.3
Food, beverages and tobacco	236	2 496	22.3	2 429	23.1	67	9.3	10.6
Non-food household products	**277**	**1 456**	**13.0**	**1 380**	**13.2**	**76**	**10.6**	**5.3**
Textiles, clothing and footwear	66	137	1.2	102	1.0	35	4.9	2.1
Equipment for professional or domestic use	105	757	6.8	738	7.0	19	2.6	7.2
Pharmaceutical and medical goods, cosmetics and cleaning materials	106	562	5.0	540	5.1	22	3.1	5.3
Intermediate products and machinery	**909**	**5 658**	**50.5**	**5 330**	**50.8**	**328**	**45.7**	**6.2**
Non-agricultural intermediate products	356	2 420	21.6	2 315	22.1	105	14.6	6.8
Energy products and miscellaneous ores and minerals	115	583	5.2	564	5.4	19	2.6	5.1
Raw materials and intermediate products	203	1 556	13.9	1 493	14.2	63	8.8	7.7
Other products	38	281	2.5	258	2.5	23	3.2	7.4
Industrial machinery and equipment	553	3 238	28.9	3 015	28.7	223	31.1	5.9
Other wholesale	**223**	**727**	**6.5**	**670**	**6.4**	**57**	**7.9**	**3.3**
Commission trade	**247**	**474**	**4.2**	**352**	**3.4**	**122**	**17.0**	**1.9**
Total	**1 984**	**11 211**	**100.0**	**10 493**	**100.0**	**718**	**100.0**	**5.6**

[1] Provisional figures.

Source: Service Central de la Statistique et des Etudes Economiques (STATEC).

Table L6: Turnover in wholesale and commission trade enterprises, Luxembourg (1990 - 1994[1])

Activity	Turnover						Growth (%)	Average annual growth rate (%)
	Value (Mio LUF)			Share (%)				
	1990	1993	1994 [1]	1990	1993	1994 [1]	1994/90	1994/90
Agricultural raw materials and food	**49 513**	**62 519**	**73 725**	**24.3**	**26.3**	**28.4**	**48.9**	**10.5**
Agricultural raw materials	5 237	5 943	11 985	2.6	2.5	4.6	128.9	23.0
Food, beverages and tobacco	44 276	56 576	61 740	21.7	23.8	23.8	39.4	8.7
Non-food household products	**12 848**	**15 714**	**17 136**	**6.3**	**6.6**	**6.6**	**33.4**	**7.5**
Textiles, clothing and footwear	1 281	1 315	1 967	0.6	0.6	0.8	53.6	11.3
Equipment for professional or domestic use	6 166	6 932	7 408	3.0	2.9	2.9	20.1	4.7
Pharmaceutical and medical goods, cosmetics and cleaning materials	5 401	7 467	7 761	2.6	3.1	3.0	43.7	9.5
Intermediate products and machinery	**111 866**	**133 190**	**140 962**	**54.8**	**55.9**	**54.3**	**26.0**	**6.0**
Non-agricultural intermediate products	74 903	92 757	97 937	36.7	39.0	37.7	30.8	6.9
Energy products and miscellaneous ores and minerals	55 846	72 794	77 710	27.4	30.6	29.9	39.2	8.6
Raw materials and intermediate products	17 368	18 147	17 835	8.5	7.6	6.9	2.7	0.7
Other products	1 689	1 816	2 392	0.8	0.8	0.9	41.6	9.1
Industrial machinery and equipment	36 963	40 433	43 025	18.1	17.0	16.6	16.4	3.9
Other wholesale	**12 502**	**12 314**	**12 888**	**6.1**	**5.2**	**5.0**	**3.1**	**0.8**
Commission trade	**17 289**	**14 394**	**15 116**	**8.5**	**6.0**	**5.8**	**-12.6**	**-3.3**
Total	**204 018**	**238 131**	**259 827**	**100.0**	**100.0**	**100.0**	**27.4**	**6.2**

[1] Provisional figures.
Source: Service Central de la Statistique et des Etudes Economiques (STATEC).

Table L7: Gross value added at market prices in wholesale and commission trade enterprises, Luxembourg (1990 - 1994[1])

Activity	Gross value added						Growth (%)	Average annual growth rate (%)
	Value (Mio LUF)			Share (%)				
	1990	1993	1994 [1]	1990	1993	1994 [1]	1994/90	1994/90
Agricultural raw materials and food	**3 949**	**4 766**	**5 464**	**17.1**	**19.2**	**20.4**	**38.4**	**8.5**
Agricultural raw materials	382	392	767	1.7	1.6	2.9	100.8	19.0
Food, beverages and tobacco	3 567	4 374	4 697	15.5	17.6	17.6	31.7	7.1
Non-food household products	**2 062**	**2 460**	**2 631**	**8.9**	**9.9**	**9.8**	**27.6**	**6.3**
Textiles, clothing and footwear	104	103	161	0.5	0.4	0.6	54.8	11.5
Equipment for professional or domestic use	1 101	1 196	1 284	4.8	4.8	4.8	16.6	3.9
Pharmaceutical and medical goods, cosmetics and cleaning materials	857	1 161	1 186	3.7	4.7	4.4	38.4	8.5
Intermediate products and machinery	**13 688**	**15 036**	**15 810**	**59.4**	**60.6**	**59.2**	**15.5**	**3.7**
Non-agricultural intermediate products	5 943	6 732	7 093	25.8	27.1	26.5	19.4	4.5
Energy products and miscellaneous ores and minerals	2 909	3 457	3 611	12.6	13.9	13.5	24.1	5.6
Raw materials and intermediate products	2 305	2 451	2 388	10.0	9.9	8.9	3.6	0.9
Other products	729	824	1 094	3.2	3.3	4.1	50.1	10.7
Industrial machinery and equipment	7 745	8 304	8 717	33.6	33.5	32.6	12.6	3.0
Other wholesale	**1 278**	**1 324**	**1 421**	**5.5**	**5.3**	**5.3**	**11.2**	**2.7**
Commission trade	**2 064**	**1 220**	**1 393**	**9.0**	**4.9**	**5.2**	**-32.5**	**-9.4**
Total	**23 041**	**24 806**	**26 719**	**100.0**	**100.0**	**100.0**	**16.0**	**3.8**

[1] Provisional figures.
Source: Service Central de la Statistique et des Etudes Economiques (STATEC).

Table L8: Average turnover and gross value added of wholesale and commission trade enterprises by activity, Luxembourg (1994) [1]

Activity	Total number of enterprises	Total number of persons employed	Turnover (Mio LUF)			Gross value added (Mio LUF)		
			Total	Average turnover per enterprise	Average turnover per person employed	Total	Average gross value added per enterprise	Average gross value added per person employed
Agricultural raw materials and food	**328**	**2 896**	**73 725**	**224**	**25.5**	**5 464**	**17**	**1.9**
Agricultural raw materials	92	400	11 985	129	30.0	767	8	1.9
Food, beverages and tobacco	236	2 496	61 740	262	24.7	4 697	20	1.9
Non-food household products	**277**	**1 456**	**17 136**	**62**	**11.8**	**2 631**	**9**	**1.8**
Textiles, clothing and footwear	66	137	1 967	30	14.4	161	2	1.2
Equipment for professional or domestic use	105	757	7 408	71	9.8	1 284	12	1.7
Pharmaceutical and medical goods, cosmetics and cleaning materials	106	562	7 761	73	13.8	1 186	11	2.1
Intermediate products and machinery	**909**	**5 658**	**140 962**	**155**	**24.9**	**15 810**	**17**	**2.8**
Non-agricultural intermediate products	356	2 420	97 937	275	40.5	7 093	20	2.9
Energy products and miscellaneous ores and minerals	115	583	77 710	676	133.3	3 611	31	6.2
Raw materials and intermediate products	203	1 556	17 835	88	11.5	2 388	12	1.5
Other products	38	281	2 392	63	8.5	1 094	29	3.9
Industrial machinery and equipment	553	3 238	43 025	78	13.3	8 717	16	2.7
Other wholesale	**223**	**727**	**12 888**	**58**	**17.7**	**1 421**	**6**	**2.0**
Commission trade	**247**	**474**	**15 116**	**61**	**31.9**	**1 393**	**6**	**2.9**
Total	**1 984**	**11 211**	**259 827**	**131**	**23.2**	**26 719**	**13**	**2.4**

[1] Provisional figures.
Source: Service Central de la Statistique et des Etudes Economiques (STATEC).

Table L9: Production value in wholesale and commission trade enterprises, Luxembourg (1990 - 1994[1])

Activity	Production value						Growth (%)	Average annual growth rate (%)
	Value (Mio LUF)			Share (%)				
	1990	1993	1994 [1]	1990	1993	1994 [1]	1994/90	1994/90
Agricultural raw materials and food	**5 955**	**7 172**	**8 664**	**16.0**	**17.6**	**19.3**	**45.5**	**9.8**
Agricultural raw materials	775	849	1 796	2.1	2.1	4.0	131.7	23.4
Food, beverages and tobacco	5 180	6 323	6 868	13.9	15.5	15.3	32.6	7.3
Non-food household products	**2 896**	**3 542**	**3 853**	**7.8**	**8.7**	**8.6**	**33.0**	**7.4**
Textiles, clothing and footwear	199	194	310	0.5	0.5	0.7	55.8	11.7
Equipment for professional or domestic use	1 517	1 713	1 853	4.1	4.2	4.1	22.1	5.1
Pharmaceutical and medical goods, cosmetics and cleaning materials	1 180	1 635	1 690	3.2	4.0	3.8	43.2	9.4
Intermediate products and machinery	**21 305**	**24 216**	**25 921**	**57.3**	**59.3**	**57.7**	**21.7**	**5.0**
Non-agricultural intermediate products	10 722	12 682	13 643	28.8	31.0	30.4	27.2	6.2
Energy products and miscellaneous ores and minerals	6 095	7 781	8 348	16.4	19.0	18.6	37.0	8.2
Raw materials and intermediate products	3 240	3 429	3 354	8.7	8.4	7.5	3.5	0.9
Other products	1 387	1 472	1 941	3.7	3.6	4.3	39.9	8.8
Industrial machinery and equipment	10 583	11 534	12 278	28.5	28.2	27.3	16.0	3.8
Other wholesale	**2 363**	**2 343**	**2 445**	**6.4**	**5.7**	**5.4**	**3.5**	**0.9**
Commission trade	**4 667**	**3 583**	**4 034**	**12.6**	**8.8**	**9.0**	**-13.6**	**-3.6**
Total	**37 186**	**40 856**	**44 917**	**100.0**	**100.0**	**100.0**	**20.8**	**4.8**

[1] Provisional figures.

Source: Service Central de la Statistique et des Etudes Economiques (STATEC).

Table L10: Intermediate consumption in wholesale and commission trade enterprises, Luxembourg (1990 - 1994[1])

Activity	Intermediate consumption						Growth (%)	Average annual growth rate (%)
	Value (Mio LUF)			Share (%)				
	1990	1993	1994 [1]	1990	1993	1994 [1]	1994/90	1994/90
Agricultural raw materials and food	**2 006**	**2 406**	**3 200**	**14.2**	**15.0**	**17.6**	**59.5**	**12.4**
Agricultural raw materials	393	457	1 029	2.8	2.8	5.7	161.8	27.2
Food, beverages and tobacco	1 613	1 949	2 171	11.4	12.1	11.9	34.6	7.7
Non-food household products	**836**	**1 083**	**1 222**	**5.9**	**6.7**	**6.7**	**46.2**	**10.0**
Textiles, clothing and footwear	96	91	148	0.7	0.6	0.8	54.2	11.4
Equipment for professional or domestic use	416	517	570	2.9	3.2	3.1	37.0	8.2
Pharmaceutical and medical goods, cosmetics and cleaning materials	324	475	504	2.3	3.0	2.8	55.6	11.7
Intermediate products and machinery	**7 618**	**9 180**	**10 112**	**53.8**	**57.2**	**55.6**	**32.7**	**7.3**
Non-agricultural intermediate products	4 779	5 949	6 550	33.8	37.1	36.0	37.1	8.2
Energy products and miscellaneous ores and minerals	3 186	4 324	4 737	22.5	26.9	26.0	48.7	10.4
Raw materials and intermediate products	935	978	966	6.6	6.1	5.3	3.3	0.8
Other products	658	647	847	4.7	4.0	4.7	28.7	6.5
Industrial machinery and equipment	2 839	3 231	3 562	20.1	20.1	19.6	25.5	5.8
Other wholesale	**1 085**	**1 019**	**1 025**	**7.7**	**6.3**	**5.6**	**-5.5**	**-1.4**
Commission trade	**2 603**	**2 363**	**2 641**	**18.4**	**14.7**	**14.5**	**1.5**	**0.4**
Total	**14 148**	**16 051**	**18 200**	**100.0**	**100.0**	**100.0**	**28.6**	**6.5**

[1] Provisional figures.
Source: Service Central de la Statistique et des Etudes Economiques (STATEC).

Table L11: Personnel costs in wholesale and commission trade enterprises, Luxembourg (1990 - 1994[1])

Activity	Personnel costs						Growth (%)	Average annual growth rate (%)
	Value (Mio LUF)			Share (%)				
	1990	1993	1994 [1]	1990	1993	1994 [1]	1994/90	1994/90
Agricultural raw materials and food	**2 189**	**2 799**	**2 854**	**22.8**	**23.3**	**23.2**	**30.4**	**6.9**
Agricultural raw materials	316	349	365	3.3	2.9	3.0	15.5	3.7
Food, beverages and tobacco	1 873	2 450	2 489	19.5	20.4	20.2	32.9	7.4
Non-food household products	**1 150**	**1 375**	**1 453**	**12.0**	**11.4**	**11.8**	**26.3**	**6.0**
Textiles, clothing and footwear	54	64	84	0.6	0.5	0.7	55.6	11.7
Equipment for professional or domestic use	654	778	809	6.8	6.5	6.6	23.7	5.5
Pharmaceutical and medical goods, cosmetics and cleaning materials	442	533	560	4.6	4.4	4.5	26.7	6.1
Intermediate products and machinery	**5 329**	**6 603**	**6 652**	**55.4**	**54.9**	**54.0**	**24.8**	**5.7**
Non-agricultural intermediate products	2 163	2 795	2 755	22.5	23.2	22.3	27.4	6.2
Energy products and miscellaneous ores and minerals	821	974	943	8.5	8.1	7.6	14.9	3.5
Raw materials and intermediate products	1 133	1 577	1 533	11.8	13.1	12.4	35.3	7.9
Other products	209	244	279	2.2	2.0	2.3	33.5	7.5
Industrial machinery and equipment	3 166	3 808	3 897	32.9	31.7	31.6	23.1	5.3
Other wholesale	**521**	**714**	**782**	**5.4**	**5.9**	**6.3**	**50.1**	**10.7**
Commission trade	**431**	**534**	**587**	**4.5**	**4.4**	**4.8**	**36.2**	**8.0**
Total	**9 620**	**12 025**	**12 328**	**100.0**	**100.0**	**100.0**	**28.1**	**6.4**

[1] Provisional figures.
Source: Service Central de la Statistique et des Etudes Economiques (STATEC).

NEDERLAND

1. Introduction and key statistics

The Netherlands, with about 450 inhabitants per square kilometre, is one of the most densely-populated countries of the European Union. By tradition and in view of its geographical location, the country specialised in becoming one of the main ports of entry for Europe. For a long time the economy has been extremely outward-looking and trade-oriented. In such an environment, the distributive trades (wholesaling and retailing) thrived and have always played a major role in assuring essential supplies and the welfare of the people.

2. The role of the wholesale trade in the Dutch economy

In 1994, almost a third (31.9%) of all Dutch enterprises were in the distributive trade sector. Wholesale firms alone accounted for 11.2% of this total.

There were 399 700 persons employed in wholesaling in 1994, representing 6.1% of the total for the whole economy. Total value added for the economy was NLG 559.8 billion in 1994, of which 7.6% was generated by wholesaling. Total intermediate consumption came to NLG 509.6 billion. Wholesaling alone was responsible for 5.1% of this.

In 1994, Dutch enterprises imported NLG 256.4 billion and exported NLG 287.5 billion. Wholesale trade firms dealt with 35.7% and 33.3% respectively of these totals.

3. Wholesale trade structure in the Netherlands: enterprises and local outlets

In the 1988-1994 period, the number of wholesale firms increased by about a third. By broad categories of main activity, the largest is the wholesale of consumer goods (including food, beverages and tobacco), which accounted for almost half of all active wholesale enterprises in 1994. Just under a third of wholesalers dealt in raw materials and intermediate products and almost a quarter in machinery and equipment.

The great majority of the 55 500 active Dutch wholesale firms are either sole proprietorships (44%) or limited companies (41%).
From 1988 to 1994, the number of local units or outlets increased by about a quarter to 60 700. The pattern by kind of activity is of course broadly similar to that of enterprises, with virtually half of the outlets wholesaling consumer goods.

In 1994, 70% of wholesale sales came from domestic sales. The principal domestic customers were manufacturing and construction firms (14%), other wholesalers (15%) and retailers (21%).

The Netherlands consists of twelve provinces. The 'Randstad' zone formed by the conurbations of Amsterdam (to the north), Rotterdam (south) and Utrecht (east) is the most densely-populated area. It covers most of the Noord-Holland, Zuid-Holland and Utrecht provinces. In these provinces the number of outlets is around five per 10 000 inhabitants.

4. Employment in Dutch wholesaling

In 1994, 399 700 persons worked in the Dutch wholesale sector, 94% as paid employees.

5. Wholesale activity and turnover in the Netherlands

Total wholesale turnover amounted to NLG 327.9 billion in 1994 - a growth of around a fifth since 1988. In 1994, the major kinds of activity (in terms of share in turnover) were machinery, equipment and supplies (21%) and food, beverages and tobacco (23%). Small and medium-sized enterprises with a turnover below NLG 1 million accounted for 52% of total sales in 1992.

6. Structure of costs in wholesale trade enterprises

In 1994, the total operating costs of wholesale enterprises (not including purchases and depreciation) amounted to 14.8% of net turnover. Personnel costs account for a major part of total operating costs.

7. Investment in fixed assets

Total wholesale investment amounted to NLG 3.8 billion in 1994. The largest investments were made by wholesalers of raw materials and intermediate products (NLG 1.5 billion) and wholesalers of consumers goods (NLG 1.4 billion). Investment by wholesalers of machinery, equipment and supplies was NLG 0.9 billion.

Table NL1: Key statistics for wholesale trade, the Netherlands (1993 - 1994)

	1993		1994		Growth (%)
	Value	Share (%)	Value	Share (%)	1994/93
Number of enterprises (1 000)	53.8		55.5		3.2
Number of local units (1 000)	58.7		60.7		3.4
Total persons employed (1 000)	**392.3**	**100.0**	**399.7**	**100.0**	**1.9**
Employees (1 000)	361.0	92.0	374.4	93.7	3.7
Self-employed (1 000)	31.3	8.0	25.3	6.3	-19.2
Part-time employes (1 000)	31.2	8.0	32.7	8.2	4.8
Turnover excluding VAT (bn NLG)	314.5		327.9		4.3
Turnover per full-time person employed (1 000 NLG)	831.6		866.4		4.2
Gross profits (GP) (bn NLG)	**61.3**		**63.6**		**3.8**
GP as % of turnover		19.5		19.4	
Personnel costs (bn NLG)	**24.2**		**24.9**		**2.9**
% of gross profits		41.1		39.2	
Gross investment in fixed assets (bn NLG)	**4.8**		**3.8**		**-20.8**
Investment in fixed assets per person employed (1 000 NLG)	12.2		9.5		-22.1

Source: Centraal Bureau voor de Statistiek (CBS), Annual Survey on Wholesale (ASW).

Table NL2: The role of wholesale trade in the Dutch economy (1994)

	Total economy	Wholesale trade	Wholesale trade (%)
Total number of enterprises (1 000)	637.7	71.7	11.2
Total distributive trade enterprises (1 000)	203.4	71.7	35.3
Economically active (1 000)	:	55.5	:
Number of persons employed (1 000)	**6 595**	**399.7**	**6.1**
Employees	5 778	374.4	6.5
Self-employed	:	25.3	:
Gross value added (GVA) in current prices (Mio NLG)	**559 800**	**42 320**	**7.6**
GVA per person employed (1 000 NLG)	84.9	105.9	
Intermediate consumption [1] (Mio NLG)	**509 552**	**25 990**	**5.1**
Imports (bn NLG)	256.4	91.5	35.7
Exports (bn NLG)	287.5	95.7	33.3

[1] 1993.

Source: CBS, National accounts, Population and employment statistics, Annual Survey on Wholesale trade (ASW), Foreign trade statistics, General Company Records (GCR).

Table NL3: Number of active enterprises of wholesale trade by activity, the Netherlands (1993 - 1994)

Activity	1993		1994		Growth (%)
	Number	Share (%)	Number	Share (%)	1994/93
Raw materials and intermediate products	**17 100**	**31.8**	**17 500**	**31.5**	**2.3**
Agricultural raw materials and livestock	5 700	10.6	5 800	10.4	1.8
Non-agricultural intermediate products	6 600	12.3	6 700	12.1	1.5
Building materials	4 800	8.9	5 000	9.0	4.2
Consumer goods	**24 900**	**46.3**	**25 800**	**46.5**	**3.6**
Food, beverages and tobacco	6 800	12.6	6 700	12.1	-1.5
Textiles, clothing and footwear	3 300	6.1	3 700	6.7	12.1
Other consumer goods	14 800	27.6	15 400	27.7	4.1
Machinery, equipment and supplies	**11 800**	**21.9**	**12 200**	**22.0**	**3.4**
Total	**53 800**	**100.0**	**55 500**	**100.0**	**3.2**

Source: Centraal Bureau voor de Statistiek, Annual Survey on Wholesale (ASW).

Table NL4: Wholesale trade enterprises by legal status, the Netherlands (1994)

Legal status	Number	Share (%)
Sole proprietorship	24 600	44.3
Partnership	6 600	11.9
Private limited company	22 600	40.7
Other legal forms	1 700	3.1
Total	**55 500**	**100.0**

Source: CBS, ASW, GCR.

Table NL5: Number of local units of wholesale trade by activity, the Netherlands (1993 - 1994)

Activity	Local units				
	1993		1994		Growth (%)
	Number	Share (%)	Number	Share (%)	1994/93
Raw materials and intermediate products	**17 500**	**29.8**	**17 900**	**29.5**	**2.3**
Agricultural raw materials and livestock	5 900	10.1	6 000	9.9	1.7
Non-agricultural intermediate products	6 700	11.4	6 800	11.2	1.5
Building materials	4 900	8.3	5 100	8.4	4.1
Consumer goods	**28 900**	**49.2**	**30 100**	**49.6**	**4.2**
Food, beverages and tobacco	7 200	12.3	7 200	11.9	0.0
Textiles, clothing and footwear	4 700	8.0	5 100	8.4	8.5
Other consumer goods	17 000	29.0	17 800	29.3	4.7
Machinery, equipment and supplies	**12 300**	**21.0**	**12 700**	**20.9**	**3.3**
Total	**58 700**	**100.0**	**60 700**	**100.0**	**3.4**

Source: CBS, ASW, GCR.

Table NL6: Wholesale trade sales by customer categories, the Netherlands (1994)

Customer category	Total		Raw materials, intermediate products		Machinery, equipment and supplies		Consumer goods	
	Value (bn NLG)	Share (%)	Value (bn NLG)	Share (%)	Value (bn NLG)	Share (%)	Value (bn NLG)	Share (%)
Manufacturing and construction	44.7	14.1	26.6	22.8	13.1	20.5	5.1	3.7
Wholesalers	46.0	14.5	15.7	13.5	7.5	11.7	22.8	16.7
Retailers	65.3	20.6	11.7	10.0	4.4	6.9	49.3	36.1
Hotels, restaurants, cafes	8.5	2.7	0.3	0.3	0.6	0.9	7.6	5.6
Other domestic customers	56.8	17.9	22.9	19.6	17.5	27.4	16.3	11.9
Non-residential customers (exports)	95.7	30.2	39.4	33.8	20.8	32.6	35.5	26.0
Total	**317.0**	**100.0**	**116.6**	**100.0**	**63.9**	**100.0**	**136.6**	**100.0**

Source: CBS, ASW.

Table NL7: Geographical distribution of local units of wholesale trade by province, the Netherlands (1994)

	Population		Area		Local units			
	Number (1 000)	Share (%)	Km^2	Share (%)	Number	Share (%)	per 10 000 inhabitants	per Km^2
Groningen	557	3.6	2 347	6.9	1 300	2.1	23.3	0.6
Friseland	607	4.0	3 359	9.9	1 800	3.0	29.6	0.5
Drente	452	2.9	2 656	7.8	1 300	2.1	28.8	0.5
Overijssel	1 045	6.8	3 339	9.8	3 500	5.8	33.5	1.0
Gelderland	1 852	12.1	5 015	14.8	6 700	11.0	36.2	1.3
Utrecht	1 056	6.9	1 331	3.9	4 800	7.9	45.4	3.6
Noord-Holland	2 457	16.0	2 667	7.9	12 000	19.8	48.8	4.5
Zuid-Holland	3 313	21.6	2 906	8.6	14 300	23.6	43.2	4.9
Zeeland	364	2.4	1 791	5.3	1 100	1.8	30.2	0.6
Noord-brabant	2 260	14.7	4 944	14.6	9 800	16.1	43.4	2.0
Limburg	1 125	7.3	2 170	6.4	3 100	5.1	27.6	1.4
Flevoland	254	1.7	1 412	4.2	1 000	1.6	39.4	0.7
Total	**15 342**	**100.0**	**33 937**	**100.0**	**60 700**	**100.0**	**39.6**	**1.8**

Source: CBS, GCR, ASW, population statistics.

Table NL8: Employment in wholesale trade by activity, the Netherlands (1993 - 1994)

Activity	Total persons employed				
	1993		1994		Growth (%)
	Number	Share (%)	Number	Share (%)	1994/93
Raw materials and intermediate products	**121 700**	**31.0**	**124 200**	**31.1**	**2.1**
Agricultural raw materials and livestock	32 600	8.3	33 500	8.4	2.8
Non-agricultural intermediate products	44 600	11.4	45 700	11.4	2.5
Building materials	44 500	11.3	45 000	11.3	1.1
Consumer goods	**161 200**	**41.1**	**164 200**	**41.1**	**1.9**
Food, beverages and tobacco	63 800	16.3	65 200	16.3	2.2
Textiles, clothing and footwear	14 600	3.7	15 400	3.9	5.5
Other consumer goods	82 800	21.1	83 600	20.9	1.0
Machinery, equipment and supplies	**109 400**	**27.9**	**111 300**	**27.8**	**1.7**
Total	**392 300**	**100.0**	**399 700**	**100.0**	**1.9**

Source: CBS, ASW.

Table NL9: Turnover in wholesale trade by activity, the Nederlands (1993 - 1994)

Activity	Turnover				
	1993		1994		Growth (%)
	Value (Mio NLG)	Share (%)	Value (Mio NLG)	Share (%)	1994/93
Raw materials and intermediate products	**115 200**	**36.6**	**119 800**	**36.5**	**4.0**
Agricultural raw materials and livestock	41 200	13.1	41 500	12.6	0.7
Non-agricultural intermediate products	47 300	15.0	49 800	15.2	5.3
Building materials	26 700	8.5	28 500	8.7	6.7
Consumer goods	**134 200**	**42.7**	**138 400**	**42.2**	**3.1**
Food, beverages and tobacco	72 500	23.1	75 100	22.9	3.6
Textiles, clothing and footwear	9 800	3.1	9 900	3.0	1.0
Other consumer goods	51 900	16.5	53 400	16.3	2.9
Machinery, equipment and supplies	**65 100**	**20.7**	**69 700**	**21.3**	**7.1**
Total	**314 500**	**100.0**	**327 900**	**100.0**	**4.3**

Source: CBS, ASW.

Table NL10: Concentration by turnover in wholesale trade, the Netherlands (1992)

Turnover category (1 000 NLG)	Cumulative turnover Share (%)
< 100	12.5
< 200	19.4
< 500	38.4
< 1 000	51.6
< 2 000	64.9
< 5 000	81.5
< 10 000	89.7
All categories	100.0

Source: CBS, ASW.

Table NL11: Structure of costs in % of the net turnover in wholesale trade enterprises, the Netherlands (1994)

Costs	All enterprises	Enterprises with less than 10 employees			Enterprises with 10 or more employees
		Total	Not legally constituted	Legally constituted	
Purchases	80.6	80.4	79.2	81.1	80.7
Gross margin	19.4	19.6	20.8	18.9	19.3
Other proceeds	0.5	0.4	0.4	0.3	0.5
Total proceeds	19.9	20.0	21.2	19.2	19.8
Labour costs	7.6	6.2	3.8	6.9	8.2
Housing costs	1.0	1.2	1.4	1.1	0.9
Inventory and machinery costs	0.3	0.2	0.4	0.2	0.3
Sales costs	2.9	2.3	2.0	2.3	3.1
Vehicle costs	0.9	1.3	2.0	1.1	0.8
General costs	2.1	2.8	2.4	2.9	1.8
Total operating costs	14.8	14.0	12.0	14.5	15.1
Operating results	5.1	6.0	9.2	4.7	4.7
Depreciation	1.2	1.4	1.8	1.2	1.1
Other liabilities minus assets	0.9	0.9	0.9	0.9	0.9
Results before taxes	3.0	3.7	6.5	2.6	2.7

Source: CBS, ASW.

Table NL12: Wholesale trade investment in fixed assets, the Netherlands (1994)

	Total		Land and building		Means of transport		Computers		Others	
	Value (bn NLG)	Share (%)	Value (bn NLG)	Share (%)	Value (bn NLG)	Share (%)	Value (bn NLG)	Share (%)	Value (bn NLG)	Share (%)
Raw materials, intermediate products	1.5	100.0	0.4	26.7	0.4	26.7	0.1	6.7	0.6	40.0
Machinery, equipment and supplies	0.9	100.0	0.2	22.2	0.1	11.1	0.2	22.2	0.4	44.4
Consumer goods	1.4	100.0	0.4	28.6	0.3	21.4	0.2	14.3	0.5	35.7
Total	**3.8**	**100.0**	**1.0**	**26.3**	**0.8**	**21.1**	**0.5**	**13.2**	**1.5**	**39.5**

Source: CBS, ASW.

ÖSTERREICH

1. Introduction and key statistics

Almost three-quarters of Austria's foreign-exchange earnings are derived from transactions (exports of goods and services, remittances, current transfers) with Member States of the European Union and the European Free Trade Association (EFTA). The share of foreign trade in GDP has been over 40% in recent years. Political and economic change in central and eastern Europe in the early 1990s has reinforced the traditionally good trade relations with these regions. Exports of goods to these countries have outstripped those to EFTA countries.

In 1988, around 181 200 persons were employed in wholesale trade in Austria, representing 5.6% of the economically active population. 18 000 wholesale-trade enterprises generated a total turnover of ATS 777 billion and a total gross value added (as estimated from the census) of ATS 99.2 billion. In the same year, wholesale trade accounted for 41% of all persons employed in the distributive trade sector and for 61% of its total value added.

2. The role of distributive trade in the Austrian economy

In 1988, 30.5% of all enterprises in the Austrian economy (57 860 of 189 940) were in the distributive trades. This share has increased since 1976 owing to the growth in the number of wholesale-trade enterprises, which rose by a half.

At the same time, distributive trade accounted for 13.5% (435 000) of the total working population of 3.2 million. Between 1976 and 1988 this share increased by one percentage point. A major part of this increase was due to the rapidly growing number of persons employed in wholesale trade, up from 163 000 to 181 000 over the period.

In 1988, the total gross value added of distributive trade represented around ATS 194 billion and had increased on average by 5.7% a year since 1976, compared with 6.7% for the total economy. The share of the distributive trades in gross value-added (at market prices) generated by the Austrian economy as a whole fell from 14.6% to 12.9% over the period 1976 to 1988.

3. Wholesale trade structure in Austria

Between 1976 and 1988 the total number of wholesale enterprises increased by 51%, from 11 900 to 18 000. The opening-up of eastern Europe was a major factor in this growth.

Over the same period, the number of wholesale establishments increased from 12 600 to 18 500, or by 47%. Within this total, commission trade establishments increased particularly sharply by 127% to almost 5 000.

Table A4 shows the development of numbers of establishments by main activity. At this level of detail there was strong growth in the numbers of wholesalers of machinery, precision instruments and technical products (101%) and wholesalers of pharmaceutical and cosmetic products (61%). The number of establishments wholesaling beverages and tobacco fell over the period.

Most (58.4%) wholesale-trade enterprises in 1988 were sole proprietorships. Private limited companies (28.0%), limited partnerships (8.9%) and ordinary partnerships (3.1%) followed far behind. There were only 61 joint stock companies.

Large companies are typical of wholesale trade in Austria. In 1988 7.5% of the total number of establishments were responsible for 75.6% of the total turnover and represented 54% of the total employment.

4. Employment in Austrian wholesaling

In 1988, approximately 182 700[1] persons were working in wholesale trade in Austria, of which 168 500 were paid employees and 14 200 self-employed (including family workers). Female and part-time workers accounted for 35.7% and 4.9% respectively of total employment.

There was no significant shift in the employment structure over the 1976-1988 period: the share of self-employed (excluding family workers) in the total number of persons employed in the sector remained

[1] Data at 31.12.1988.

stable at 6.7% (12 295 persons) and that of employees stayed at 92%.

The biggest employers were private limited companies (with 47.9% of all persons employed), followed by sole proprietors (19.7%) and limited partnerships (17.7%).

Intermediate products (defined as non-agricultural intermediate products combined with industrial machinery and equipment) accounted for 50.5% of total employment in wholesale trade (92 300 persons). Agricultural materials and food ranked next with 23.2% of total employment (42 500 persons), followed by non-food products with a share of 15.9% (29 000). Commission trade accounted for only 4.6% of the total (8 400 persons).

Women were relatively well represented in the machinery, precision instruments and technical products category (15.8%), in food, beverages and tobacco (14.0%) and in metallic products and wood, construction materials and flat glass (7.1%).

5. Wholesale trade activity in Austria

In 1995, total wholesale trade turnover (excluding VAT) amounted to ATS 975.7 billion. Its average annual growth after 1976 was 5.4% at current prices and 3.5% at 1983 prices.

In 1988, private limited companies generated 50.3% of total turnover in the wholesale trade.

Differences depend primarily on the nature of the product sold, however. In 1995 the highest turnover was found in machinery, precision instruments and technical products (ATS 133.5 billion), followed by food (ATS 117.5 billion) and fuel oils and gasoline (ATS 104.5 billion). These accounted for 36.4% of total turnover. Commission trade recorded a turnover of only ATS 6.3 billion (0.6% of the total).

In 1988, gross margins amounted to ATS 141 billion, representing 18.7% of sales of products purchased for resale. 60% of this total came from the wholesaling of intermediate products (as defined above), while non-food products accounted for 18% and agricultural materials for 16% of the total. The remainder came almost entirely from the miscellaneous other goods category.

Machinery, precision instruments and technical products is the leading sector in terms of gross margins, accounting for 17% of the total in 1988. Fuel oils and gasoline ranked next at 14%, followed by food at 8%.

It is interesting to note that, in general, the higher the turnover of an enterprise the lower the share of gross margin as a percentage of sales of products purchased for resale.

In 1988, capital investment by wholesale trade enterprises was valued at ATS 15 billion. This figure increased by 127% from 1976 to 1988. Most of the investments were in machinery and equipment (ATS 6.2 billion in 1988). Building and maintenance were also significant, at ATS 4.1 billion. ATS 3.0 billion were invested in vehicles during the same year, compared with ATS 1.5 billion in 1976.

6. Methodology

The statistical unit in Austria for economic statistics is the establishment, defined as a local self-contained unit capable of reporting production costs. In years when sectoral censuses are carried out, however, establishments belonging to an enterprise can be aggregated.

Wholesale-trade enterprise statistics are derived from the non-agricultural sectoral census; the most recent census for which results are available was conducted for 1988 (a census has now also been conducted for 1995).

Gross trade margin was calculated by sector and by turnover category on the basis of the 1988 sectoral census.

Table A1: Key statistics for wholesale trade, Austria (1976 - 1988)

	1976	1983	1988
Number of enterprises	11 907	14 814	18 012
Number of establishments	12 554	15 330	18 509
Number of local outlets	15 427	18 514	21 898
Total employment (annual average)	162 810	168 572	181 203
Women (% at 31 December)	36.1	36.4	35.7
Part-time workers (% at 31 December)	3.7	5.5	4.9
Self-employed (annual average)	13 053	12 271	14 171
Employees (annual average)	149 757	156 301	167 032
Turnover (Mio ATS)	351 223	659 256	777 063
Turnover per person employed (1 000 ATS)	2 157	3 911	4 288
Census value added (Mio ATS) [1]	45 756	78 253	99 224
Census value added per person employed (1 000 ATS) [1]	281	464	548
Personnel costs (Mio ATS)	24 616	42 903	57 479
Personnel costs per employee (1 000 ATS)	164	274	344
Gross operating surplus (Mio ATS)	21 140	35 350	41 745
Depreciation (Mio ATS)	5 321	6 962	8 581
Net operating surplus (Mio ATS)	15 819	28 388	33 164
Net operating surplus per self-employed person (1 000 ATS)	1 212	2 313	2 340
Total investment (Mio ATS)	6 621	9 465	15 034
Total investment per person employed (1 000 ATS)	41	61	83
Total inventories at 31 December (Mio ATS)	33 559	54 984	72 020

[1] Excluding any allowance for under-reporting.
Source: Austrian Central Statistical Office (ACSO), Census surveys.

Table A2: The role of trade in the Austrian economy (1988)

	Value	Share (%)
a) Number of enterprises		
Total enterprises (including agricultural business)	499 571	
Total enterprises (excluding agricultural business)	189 940	100.0
Total distributive trade enterprises	57 865	30.5
Wholesale trade	18 012	9.5
Retail trade	39 853	21.0
b) Employment (1 000)		
Total resident population	7 596	
Total employment	3 224	100.0
Persons employed in distributive trade	435	13.5
Wholesale trade (annual average)	181	5.6
Retail trade	254	7.9
c) Value added (bn ATS)		
Gross domestic product	1 566.6	
Gross value added of all branches	1 505.8	100.0
Gross value added of the distributive trade	193.6	12.9
Wholesale trade	117.8	7.9
Retail trade	75.8	5.0
d) Final household consumption expenditure (bn ATS)		
Food, beverages and tobacco	195.1	21.0
Clothing, footwear	89.7	9.7
Gross rents, fuel and power	164.1	17.7
Furniture, household equipment	71.7	7.7
Health	46.6	5.0
Transport and communication	141.4	15.3
Education, recreation	67.3	7.3
Miscellaneous	151.1	16.3
Total	**927.0**	**100.0**
Tradable consumption	557.7	60.2

Source: Austrian Central Statistical Office (ACSO), Census surveys, National Accounts.

Table A3: Wholesale trade by legal status, Austria (1976 - 1988)

	1976	1983	1988
	Share (%)	Share (%)	Share (%)
a) Number of enterprises			
Sole proprietorship	64.3	57.1	58.4
Ordinary partnership	7.2	4.6	3.1
Limited partnership	9.0	10.1	8.9
Private limited company	16.6	26.2	28.0
Joint-stock company	0.6	0.4	0.3
Cooperatives and other	2.3	1.6	1.3
Total	**100.0**	**100.0**	**100.0**
b) Number of persons employed			
Sole proprietorship	26.2	19.9	19.7
Ordinary partnership	9.4	5.4	C
Limited partnership	17.0	18.1	17.7
Private limited company	27.5	39.0	47.9
Joint-stock company	9.4	9.7	C
Cooperatives and other	10.5	7.9	C
Total	**100.0**	**100.0**	**100.0**
c) Turnover (bn ATS)			
Sole proprietorship	17.5	11.2	9.5
Ordinary partnership	7.0	4.1	C
Limited partnership	16.1	15.2	14.6
Private limited company	30.4	45.2	50.3
Joint-stock company	15.1	14.3	C
Cooperatives and other	13.9	10.0	C
Total	**100.0**	**100.0**	**100.0**
d) Census value added (bn ATS)			
Sole proprietorship	20.6	14.5	11.9
Ordinary partnership	8.1	4.5	C
Limited partnership	16.6	16.6	15.8
Private limited company	33.2	46.4	53.2
Joint-stock company	11.9	12.4	C
Cooperatives and other	9.6	5.6	C
Total	**100.0**	**100.0**	**100.0**

C: Confidential data.
Source: Austrian Central Statistical Office (ACSO), Census surveys.

Table A4: Number of wholesale trade establishments by activity, Austria (1976 - 1988)

Activity	Number of establishments			Share (%)			Growth (%)
	1976	1983	1988	1976	1983	1988	1988/76
Agricultural products, livestock	1 642	1 628	1 573	13.1	10.6	8.5	- 4.2
Textiles	275	317	272	2.2	2.1	1.5	- 1.1
Furs, pelts and leather	132	100	87	1.1	0.6	0.5	-34.1
Wood, construction materials and flat glass	1 106	1 279	1 443	8.8	8.3	7.8	30.5
Iron and non-ferrous metals	161	215	227	1.3	1.4	1.2	41.0
Fuel oils and gasoline	262	242	200	2.1	1.6	1.1	-23.7
Other raw materials and semi-finished products	389	479	539	3.1	3.1	2.9	38.6
Food	812	831	855	6.5	5.4	4.6	5.3
Wines and spirits	369	368	324	2.9	2.4	1.7	-12.2
Tobacco	174	78	54	1.4	0.5	0.3	-69.0
Knitwear, wearing apparel and bedding	226	327	444	1.8	2.1	2.4	96.5
Shoes and leather products	66	117	111	0.5	0.8	0.6	68.2
Pharmaceutical and cosmetic products, cleaning products	260	381	418	2.1	2.5	2.3	60.8
Agricultural machines and equipment	363	399	423	2.9	2.6	2.3	16.5
Electrical articles	533	711	811	4.2	4.6	4.4	52.2
Vehicles	330	348	348	2.6	2.3	1.9	5.5
Machines, precision instruments and technical products	1 270	1 887	2 555	10.1	12.3	13.8	101.2
Furniture and household utensils	233	256	268	1.9	1.7	1.4	15.0
Metallic products and household machines	581	654	778	4.6	4.3	4.2	33.9
Paper and paper products, office articles	329	353	382	2.6	2.3	2.1	16.1
Other goods	856	1 175	1 432	6.8	7.7	7.7	67.3
Commission trade	**2 185**	**3 185**	**4 965**	**17.4**	**20.8**	**26.8**	**127.2**
Total	**12 554**	**15 330**	**18 509**	**100.0**	**100.0**	**100.0**	**47.4**

Source: Austrian Central Statistical Office (ACSO), Census surveys.

Table A5: Employment in Austrian wholesale and commission trade, Austria (1976 - 1988) [1]

	1976		1983		1988	
	Value	Share (%)	Value	Share (%)	Value	Share (%)
Total employment	163 683	100.0	168 983	100.0	182 712	100.0
Women	59 025	36.1	61 431	36.4	65 219	35.7
Employees	150 630	92.0	156 712	92.7	168 541	92.2
Self-employed owners	10 978	6.7	10 527	6.2	12 295	6.7
Family workers	2 075	1.3	1 744	1.0	1 876	1.0
Total employees	150 630	100.0	156 712	100.0	168 541	100.0
Women	55 222	36.7	57 960	34.3	61 228	36.3
Part-time workers	5 551	3.7	8 625	5.5	8 294	4.9
Foreign workers	5 321	3.5	5 028	3.2	5 621	3.3

[1] At 31 December.
Source: Austrian Central Statistical Office (ACSO).

Table A6: Employment in Austrian wholesale and commission trade by activity, Austria (1988)

Activity	Total employment [1]	Employees	Self employed [1]		Women	Part-time workers
			Owners	Family workers		
Agricultural products, livestock	19 151	17 754	1 145	252	4 967	822
Textiles	2 105	1 906	167	32	1 343	149
Furs, pelts and leather	572	488	71	13	244	31
Wood, construction materials and flat glass	15 506	14 330	980	196	4 652	550
Iron and non-ferrous metals	5 029	4 912	100	17	1 542	119
Fuel oils and gasoline	4 663	4 572	80	11	1 274	131
Other raw materials and semi-finished products	4 440	4 045	342	53	1 457	150
Food	20 326	19 679	516	131	8 258	943
Wines and spirits	2 202	1 842	281	79	691	121
Tobacco	222	163	47	12	161	19
Knitwear, wearing apparel and bedding	3 264	3 002	235	27	2 110	240
Shoes and leather products	808	747	54	7	482	56
Pharmaceutical and cosmetic products, cleaning products	7 858	7 641	182	35	4 168	586
Agricultural machines and equipment	3 252	2 844	346	62	664	88
Electrical articles	11 204	10 826	333	45	3 736	466
Vehicles	9 724	9 538	153	33	2 462	219
Machines, precision instruments and technical products	31 861	30 473	1 217	171	10 293	1 259
Furniture and household utensils	3 842	3 666	144	32	1 569	215
Metallic products and household machines	13 530	13 088	385	57	4 270	567
Paper and paper products, office articles	4 337	4 072	233	32	2 122	204
Other goods	10 374	9 373	856	145	5 281	816
Commission trade	**8 442**	**3 580**	**4 428**	**434**	**3 473**	**543**
Total	**182 712**	**168 541**	**12 295**	**1 876**	**65 219**	**8 294**

[1] At 31 December.
Source: Austrian Central Statistical Office (ACSO).

Table A7: Turnover in Austrian wholesale trade (1995)

Activity	Turnover		Turnover at current prices	Turnover at 1983 prices	Prices
	Value (Mio ATS)	Share (%)	Average annual growth rate (%) 1995/76		
Agricultural products, livestock	91 312	9.4	2.5	1.9	0.6
Textiles	4 568	0.5	0.9	- 2.2	3.2
Furs, pelts and leather	1 323	0.1	- 0.3	- 1.4	1.1
Wood, construction materials and flat glass	65 642	6.7	6.3	3.5	2.7
Iron and non-ferrous metals	41 255	4.2	6.2	4.6	1.6
Fuel oils and gasoline	104 461	10.7	2.6	0.4	2.2
Other raw materials and semi finished products	27 889	2.9	6.0	4.9	1.1
Food	117 481	12.0	4.9	3.2	1.6
Wines and spirits	5 172	0.5	2.3	0.0	2.3
Tobacco	15 878	1.6	13.5	9.3	3.9
Knitwear, wearing apparel and bedding	12 943	1.3	7.3	5.4	1.8
Shoes and leather products	4 824	0.5	5.6	3.4	2.1
Pharmaceutical and cosmetic products, cleaning products	45 907	4.7	8.9	8.4	0.4
Agricultural machines and equipment	7 450	0.8	2.5	- 0.5	3.1
Electrical articles	51 424	5.3	5.9	4.8	1.1
Vehicles	95 674	9.8	7.1	3.5	3.4
Machines, precision instruments and technical products	133 482	13.7	8.5	8.5	- 0.1
Furniture and household utensils	11 571	1.2	5.0	2.3	2.6
Metallic products and household machines	54 642	5.6	6.1	2.2	3.8
Paper and paper products, office articles	24 796	2.5	7.3	4.3	2.8
Other goods	51 729	5.3	7.9	5.7	2.1
Commission trade	**6 287**	**0.6**	**3.6**	**1.7**	**1.9**
Total	**975 710**	**100.0**	**5.4**	**3.5**	**1.9**

Source: Austrian Central Statistical Office (ACSO), National Accounts, revised figures.

Table A8: Concentration in Austrian wholesale trade by turnover and employees category, Austria (1976 - 1988)

	Cumulative share (%)					
	1976			1988		
	Establishments	Turnover	Employment	Establishments	Turnover	Employment
a) Turnover category (1 000 ATS)						
≤250	9.5	0.0	0.9	15.1	0.0	1.7
< 500	16.1	0.1	1.7	21.6	0.1	2.6
< 1 000	25.1	0.4	3.1	29.5	0.2	3.8
< 5 000	53.0	3.0	10.7	53.8	1.7	9.3
< 10 000	67.1	6.7	18.4	66.1	3.8	14.3
< 50 000	90.3	25.2	46.2	87.3	15.6	34.2
< 100 000	95.1	37.4	60.3	92.5	24.4	46.0
All categories	100.0	100.0	100.0	100.0	100.0	100.0
b) Employees category						
0	22.9	2.3	0.9	32.2	0.9	3.8
< 2	37.4	4.6	2.4	50.1	3.2	6.9
< 5	59.4	11.2	7.6	69.6	8.8	13.6
< 10	74.6	20.2	16.4	81.9	18.0	22.6
< 20	86.4	33.5	29.2	90.0	28.9	34.3
< 50	95.0	54.1	48.7	96.3	48.6	54.0
< 100	98.1	70.7	66.4	98.5	63.1	69.5
< 500	99.9	94.6	92.7	100.0	95.1	96.5
< 1 000	100.0	C	C	100.0	C	C
All categories	100.0	C	C	100.0	C	C

C: Confidential data.
Source: Austrian Central Statistical Office (ACSO), Census surveys.

Table A9: Gross margins in Austrian wholesale trade (1988)

	Gross margins		Gross margins as % of sales of products purchased for resale
	Value (Mio ATS)	Share (%)	
a) Activity [1]			
Agricultural products, livestock	9 177	6.5	8.8
Textiles	1 874	1.3	22.9
Furs, pelts and leather	353	0.3	18.6
Wood, construction materials and flat glass	9 379	6.6	19.4
Iron and non-ferrous metals	3 658	2.6	14.2
Fuel oils and gasoline	20 031	14.2	24.2
Other raw materials and semi finished products	4 203	3.0	16.4
Food	11 793	8.3	11.8
Wines and spirits	1 292	0.9	34.0
Tobacco	48	0.0	14.2
Knitwear, wearing apparel and bedding	3 254	2.3	29.7
Shoes and leather products	784	0.6	21.4
Pharmaceutical and cosmetic products, cleaning products	5 743	4.1	22.6
Agricultural machines and equipment	1 536	1.1	21.1
Electrical articles	10 545	7.5	28.0
Vehicles	9 955	7.1	14.4
Machines, precision instruments and technical products	24 089	17.1	30.2
Furniture and household utensils	2 611	1.8	28.3
Metallic products and household machines	8 816	6.2	24.4
Paper and paper products, office articles	3 112	2.2	19.4
Other goods	8 758	6.2	14.6
Commission trade	**143**	**0.1**	**27.6**
Total	**141 154**	**100.0**	**18.7**
b) Turnover [2] category (1 000 ATS)			
≤ 250			41.7
251 - 500			38.0
501 - 1 000			35.9
1 001 - 5 000			32.6
5 001 -10 000			29.7
10 001 - 50 000			27.7
50 001 - 100 000			25.2
≥ 100 000			16.9
Total			**18.7**

[1] National accounts.
[2] Census survey.
Source: Austrian Central Statistical Office (ACSO).

Table A10: Gross output and value added of the Austrian wholesale trade (1976 - 1995)

	Sales of goods purchased for resale (Mio ATS)	Inputs of goods purchased for resale (Mio ATS)	Gross margin (Mio ATS)	Gross margin as % of sales	Other output (Mio ATS)	Total output (Mio ATS)	Growth on previous year (%)	Value added (Mio ATS)	Growth on previous year (%)
a) At current prices									
1976	344 671	279 848	64 823	18.8	11 954	76 777	:	53 915	:
1980	494 764	401 696	93 068	18.8	18 246	111 314	4.8	77 515	4.8
1985	869 773	745 682	124 091	14.3	25 342	149 433	7.1	101 245	6.9
1988	762 132	615 073	147 059	19.3	29 041	176 100	7.7	116 721	6.5
1990	881 491	708 071	173 420	19.7	32 662	206 082	7.6	137 325	8.1
1991	929 948	742 314	187 634	20.2	33 417	221 051	7.3	146 551	6.7
1992	928 232	740 248	187 984	20.3	34 207	222 191	0.5	147 841	0.9
1993	892 945	706 125	186 820	20.9	32 897	219 717	- 1.1	145 505	- 1.6
1994	933 529	738 733	194 796	20.9	33 496	228 292	3.9	151 527	4.1
1995	941 368	725 467	215 901	22.9	34 349	250 250	9.6	169 987	12.2
b) At 1983 prices									
1976	458 145	373 976	84 169	18.4	16 460	100 629	:	69 165	:
1980	556 871	453 694	103 177	18.5	20 834	124 011	- 2.9	85 105	- 0.2
1988	764 692	618 843	145 849	19.1	27 397	173 246	7.2	117 328	6.7
1989	824 095	667 199	156 896	19.0	28 579	185 475	7.1	125 144	6.7
1990	849 451	682 068	167 383	19.7	28 918	196 301	5.8	132 479	5.9
1991	886 792	708 477	178 315	20.1	29 211	207 526	5.7	140 126	5.8
1992	882 101	706 032	176 069	20.0	29 299	205 368	- 1.0	138 982	- 0.8
1993	855 766	678 855	176 911	20.7	27 933	204 844	- 0.3	139 161	0.1
1994	883 582	701 661	181 921	20.6	27 846	209 767	2.4	142 377	2.3
1995	885 020	688 378	196 642	22.2	27 851	224 493	7.0	154 844	8.8

Source: Austrian Central Statistical Office (ACSO), National Accounts, revised figures.

Table A11: Wholesale price index (base: 1986=100, excluding VAT), Austria (1985 - 1996)

Groups	Weight (%)	Growth (%)	Growth on previous year (%)	
	1985	1994/86	1995	1996
Agricultural products	10.8	5.6	-7.9	-12.6
Fertilizers and plant protection	2.7	-19.6	0.2	-2.2
Live animals	2.9	11.3	-8.4	-1.4
Textiles	1.9	19.0	0.6	0.3
Hides skins and leather	0.5	-13.2	-1.3	-3.9
Wood and semi-finished wood products	2.3	-0.9	4.5	-1.2
Construction materials	3.0	16.6	2.0	0.9
Flat glass	0.2	20.1	1.2	-0.2
Iron, steel and semi-finished products	3.2	-6.3	15.5	0.1
Non-ferrous metal and semi-finished products	0.4	-6.8	12.1	-10.0
Solid fuels	1.9	-17.0	2.4	4.6
Products of petroleum refineries	14.9	-5.5	6.3	9.1
Minerals, industrial chemicals	2.7	7.9	6.9	-4.7
Used goods	0.7	-9.7	8.3	-19.9
Food and food products	13.5	4.5	-6.3	1.4
Wine and spirits	0.5	21.7	-2.5	1.3
Wearing apparel, bed-clothes	1.3	-4.5	-1.7	-1.0
Footwear and leather goods	0.7	8.8	0.0	0.7
Pharmaceutical goods	2.6	-7.8	-0.3	0.3
Cosmetic articles and cleaning preparations	0.8	6.1	-0.1	-2.3
Agricultural machinery and equipment (including trailers)	1.0	19.6	1.6	-0.1
Electrical articles	4.0	4.9	1.7	-2.6
Vehicles	8.1	27.8	-0.2	0.0
Precision instruments	1.6	-3.1	1.1	1.4
Building machinery	0.7	27.6	0.6	3.3
Machinery, other technical equipment	6.8	-20.0	-0.8	-0.1
Furniture	0.7	31.5	1.2	2.9
Household furnishing articles of textile materials	0.6	9.6	1.0	0.9
Hardware	3.4	24.0	2.7	1.5
Glass products, china and earthenware	0.8	26.6	3.1	1.3
Paper and paper products, office articles	2.7	18.4	10.9	2.7
Books, periodicals, newspapers	0.8	20.6	0.4	1.6
Toys, sporting and related articles, musical instruments	0.8	9.3	-0.8	-1.1
Watches and jewellery	0.4	-16.7	-0.8	0.2
Total	**100.0**	**3.9**	**0.4**	**0.0**
Special classifications				
Category of goods				
Durable consumer goods	27.7	7.9	0.4	0.3
Non-durable consumer goods	27.7	10.2	2.5	-2.5
Final use				
Consumer goods	44.6	12.2	1.7	-1.5
Investment goods	10.7	-3.8	0.3	0.5
Intermediate goods (semi-manufactures)	44.7	-2.4	-1.2	1.6
Season				
Seasonal goods (fruit and vegetables)	2.4	10.9	4.2	3.9
Non-seasonal goods	97.6	3.8	0.2	-0.1

Source: Austrian Central Statistical Office (ACSO) .

Table A12: Investment in Austrian wholesale trade (1976 - 1988)

Kind of investment	Value (Mio ATS)			Growth (%)		
	1976	1983	1988	1983/76	1988/83	1988/76
Land, existing buildings	395	485	901	22.8	85.8	128.1
Buildings and maintenance	1 939	2 763	4 092	42.5	48.1	111.0
Machinery and equipment	2 431	3 784	6 155	55.7	62.7	153.2
Vehicles	1 544	1 907	2 965	23.5	55.5	92.0
Goods of low value	214	366	528	71.0	44.3	146.7
Used assets	98	160	393	63.3	145.6	301.0
Total	**6 621**	**9 465**	**15 034**	**43.0**	**58.8**	**127.1**

Source: Austrian Central Statistical Office (ACSO), Census surveys.

SUOMI/FINLAND

Table FIN1: Key statistics for wholesale and commission trade, Finland (1986 - 1992)

	Value		
	1986	1989	1992
Number of enterprises	8 284	10 504	11 972
Number of local units	10 681	12 674	13 955
Persons employed	100 083	94 306	81 350
Employees	96 858	91 434	77 169
Self-employed	3 225	2 872	4 180
Wages and salaries (1 000 FIM)	9 242 549	11 480 041	10 818 516
Turnover (excluding VAT) 1 000 FIM	141 144 480	181 374 657	160 522 320
Turnover per person employed (1 000 FIM)	1 410	1 923	1 973
Gross margin (1 000 FIM)	25 550 858	35 225 178	30 400 236
Value added (current prices) (Mio FIM)	17 314	23 364	20 034
Value added per person employed (FIM)	172 996	247 747	246 269
Value added per enterprise (1 000 FIM)	2 090	2 224	1 673
Total net investments (Mio FIM) [1]	2 829	5 287	3 323
Net investment per person employed (FIM) [1]	28 267	56 066	40 851
Net investment per enterprise (1 000 FIM) [1]	342	503	278
Gross fixed capital formation (Mio FIM) [1]	3 526	5 628	3 335

[1] Including shares and holdings.
Source: Statistics Finland.

Table FIN2: The role of trade in the Finnish economy (1992)

	Value	Share (%)
a) Number of enterprises		
Total enterprises (including agricultural businesses)	125 700	100.0
Total distributive trade enterprises	39 506	31.4
Wholesale trade	10 247	8.1
Commission trade	1 725	1.4
Retail trade	27 534	21.9
b) Employment (1 000)		
Total resident population	5 055	
Total employment	2 174	100.0
Women	1 061	48.8
Distributive trade	215	9.9
Wholesale and commission trade	81	3.7
Women	:	36.5
Wholesale trade	77	3.5
Commission trade	4	0.2
Retail trade	133	6.2
Women	:	57.2
c) Value added (Mio FIM)		
Gross domestic product in purchasers' prices	476 559	
Value added of all sectors	415 493	100.0
Value added of the distributive trade sector	40 616	11.3
Value added of wholesale trade and commission trade	20 034	5.5
Gross fixed capital formation	87 953	100.0
Gross fixed capital formation in distributive trade	6 604	8.0
Gross fixed capital formation in wholesale trade	3 335	4.1
d) Consumer expenditure (Mio FIM)		
Final consumption expenditure	390 567	
Final consumption expenditure of households	261 136	100.0
Food	43 243	16.6
Alcoholic drinks	11 885	4.5
Tobacco	6 177	2.4
Clothing and footwear	12 515	4.8
Housing	46 818	17.9
Fuel and power	11 235	4.3
Household goods and services	15 583	6.0
Health care	13 118	5.0
Transport and communication	37 226	14.2
Recreation, entertainment and education	24 229	9.3
Other goods, services	39 107	15.0

Source: Statistics Finland.

Table FIN3: Number of wholesale and commission trade enterprises by activity, Finland (1986 - 1992)

Activity	Enterprises				Growth (%)	Average annual growth rate (%)
	Number		Share (%)			
	1986	1992	1986	1992	1992/86	1992/86
Non-specialized wholesale trade	25	29	0.3	0.2	16.0	2.5
Food, beverages and tobacco	664	815	8.0	6.8	22.7	3.5
Textiles, clothing and leather goods	604	878	7.3	7.4	45.4	6.4
Hardware and construction materials	928	1 435	11.2	12.0	54.6	7.5
Electrical supplies and household appliances	420	705	5.1	5.9	67.9	9.0
Fuels	70	88	0.8	0.7	25.7	3.9
Raw materials	718	756	8.7	6.3	5.3	0.9
Machinery and other capital goods	1 863	2 941	22.5	24.6	57.9	7.9
Other products	1 326	2 195	16.0	18.3	65.5	8.8
Motor vehicles and motor vehicle parts	310	405	3.7	3.4	30.6	4.6
Wholesale trade	**6 928**	**10 247**	**83.6**	**85.6**	**47.9**	**6.7**
Commission trade	**1 356**	**1 725**	**16.4**	**14.4**	**27.2**	**4.1**
Total	**8 284**	**11 972**	**100.0**	**100.0**	**44.5**	**6.3**

Source: Statistics Finland.

Table FIN4: Number of enterprises, persons employed, turnover in wholesale and commission trade by legal status, Finland (1992)

Activity	Total	Legal status											
		Sole proprietorship		General partnership		Limited partnership		Limited company		Cooperative society		Other	
		Value	Share (%)	Value	Share (%)	Value	Share (%)	Value	Share (%)	Value	Share (%)	Value	Share (%)
Wholesale trade													
Number of enterprises	10 247	1 206	11.8	298	2.9	1 963	19.2	6 685	65.2	46	0.4	49	0.5
Persons employed	76 733	1 503	1.9	758	1.0	4 585	6.0	68 272	89.0	855	1.1	760	1.0
Turnover (Mio FIM)	157 384	1 225	0.8	621	0.4	4 763	3.0	141 877	90.2	3 984	2.5	4 913	3.1
Commission trade													
Number of enterprises	1 725	258	15.0	41	2.4	350	20.3	1 053	61.0	10	0.6	13	0.7
Persons employed	4 617	286	6.2	73	1.6	592	12.8	3 023	65.5	150	3.2	493	10.7
Turnover (Mio FIM)	3 138	101	3.2	30	0.9	298	9.5	1 964	62.6	121	3.9	624	19.9
Total													
Number of enterprises	11 972	1 464	12.2	339	2.8	2 313	19.3	7 738	64.7	56	0.5	62	0.5
Persons employed	81 350	1 789	2.2	831	1.0	5 177	6.4	71 295	87.6	1 005	1.2	1 253	1.6
Turnover (Mio FIM)	160 522	1 326	0.8	650	0.4	5 062	3.2	143 840	89.6	4 105	2.6	5 537	3.4

Source: Statistics Finland.

Table FIN5: Number of wholesale and commission trade local units by activity, Finland (1986 - 1992)

Activity	Local units				Growth (%)	Average annual growth rate (%)
	Number		Share (%)			
	1986	1992	1986	1992	1992/86	1992/86
Non-specialized wholesale trade	226	44	2.1	0.3	-80.5	-23.9
Food, beverages and tobacco	1 047	1 054	9.8	7.5	0.7	0.1
Textiles, clothing and leather goods	654	911	6.1	6.5	39.3	5.7
Hardware and construction materials	1 282	1 727	12.0	12.4	34.7	5.1
Electrical supplies and household appliances	536	831	5.0	6.0	55.0	7.6
Fuels	166	171	1.6	1.2	3.0	0.5
Raw materials	775	822	7.3	5.9	6.1	1.0
Machinery and other capital goods	2 616	3 699	24.5	26.5	41.4	5.9
Other products	1 531	2 359	14.3	16.9	54.1	7.5
Motor vehicles and motor vehicle parts	454	554	4.2	4.0	22.0	3.4
Wholesale trade	**9 287**	**12 172**	**86.9**	**87.2**	**31.1**	**4.6**
Commission trade	**1 394**	**1 783**	**13.1**	**12.8**	**27.9**	**4.2**
Total	**10 681**	**13 955**	**100.0**	**100.0**	**30.7**	**4.6**

Source: Statistics Finland.

Table FIN6: Geographical distribution of wholesale and commission trade local units, Finland (1992)

Regions	Population		Land area	Local units				Turnover (Mio FIM)	
	Number	Share (%)	Km²	Number	Share (%)	Per 10 000 inhabitants	Per square Km²	Total	Share (%)
Uudenmaan	1 277 932	25.3	9 898	6 131	43.9	48.0	0.62	118 396	73.8
Turun ja Porin	731 786	14.5	22 833	1 797	12.9	24.6	0.08	14 941	9.3
Hämeen	688 200	13.6	16 341	1 877	13.5	27.3	0.12	10 648	6.6
Kymen	335 037	6.6	10 783	546	3.9	16.3	0.05	2 239	1.4
Mikkelin	207 967	4.1	16 342	277	2.0	13.3	0.02	629	0.4
Pohjois-Karjalan	177 893	3.5	17 782	269	1.9	15.1	0.02	572	0.4
Kuopion	258 662	5.1	16 509	476	3.4	18.4	0.03	3 269	2.0
Keski-Suomen	255 989	5.1	16 230	400	2.9	15.6	0.03	1 323	0.8
Vaasan	448 384	8.9	26 416	1 182	8.5	26.4	0.05	4 554	2.8
Oulun	445 706	8.8	56 868	661	4.7	14.8	0.01	2 993	1.9
Lapin	202 433	4.0	93 057	241	1.7	11.9	0.00	455	0.3
Åland	24 993	0.5	1 527	98	0.7	39.2	0.06	503	0.3
Total	**5 054 982**	**100.0**	**304 586**	**13 955**	**100.0**	**27.6**	**0.05**	**160 522**	**100.0**

Source: Statistics Finland.

Table FIN7: Employment in wholesale and commission trade by activity, Finland (1986 -1992)

Activity	Persons employed								Growth (%)	Average annual growth rate (%)
	Total				Employees		Self-employed			
	Number		Share (%)		Number	Number	Number	Number		
	1986	1992	1986	1992	1986	1992	1986	1992	1992/86	1992/86
Non-specialized wholesale trade	21 573	6 402	21.6	7.9	21 571	6 394	2	8	-70.3	-18.3
Food, beverages and tobacco	6 004	6 699	6.0	8.2	5 694	6 335	310	364	11.6	1.8
Textiles, clothing and leather goods	2 013	2 885	2.0	3.5	1 735	2 559	278	326	43.3	6.2
Hardware and construction materials	9 778	8 787	9.8	10.8	9 369	8 286	409	501	-10.1	-1.8
Electrical supplies and household appliances	6 154	6 614	6.1	8.1	6 033	6 424	121	190	7.5	1.2
Fuels	2 664	2 325	2.7	2.9	2 627	2 285	37	40	-12.7	-2.2
Raw materials	2 916	3 743	2.9	4.6	2 580	3 384	336	359	28.4	4.2
Machinery and other capital goods	21 932	25 205	21.9	31.0	21 237	24 330	695	875	14.9	2.3
Other products	13 313	10 750	13.3	13.2	12 827	9 967	486	783	-19.3	-3.5
Motor vehicles and motor vehicle parts	8 399	3 323	8.4	4.1	8 321	3 188	78	135	-60.4	-14.3
Wholesale trade	**94 746**	**76 733**	**94.7**	**94.3**	**91 994**	**73 152**	**2 752**	**3 581**	**-19.0**	**-3.5**
Commission trade	**5 337**	**4 617**	**5.3**	**5.7**	**4 864**	**4 017**	**473**	**599**	**-13.5**	**-2.4**
Total	**100 083**	**81 350**	**100.0**	**100.0**	**96 858**	**77 169**	**3 225**	**4 180**	**-18.7**	**-3.4**

Source: Statistics Finland.

Table FIN8: Wholesale and commission trade enterprises by employment size-class, Finland (1986 - 1992)

Employment size-class	Enterprises				Growth (%)	Annual average growth rate (%)
	Number		Share (%)			
	1986	1992	1986	1992	1992/86	1992/86
0 - 4	5 955	9 710	71.9	81.1	63.1	8.5
5 - 9	1 126	1 054	13.6	8.8	-6.4	-1.1
10 - 19	598	617	7.2	5.2	3.2	0.5
20 - 49	359	390	4.3	3.3	8.6	1.4
50 - 99	127	99	1.5	0.8	-22.0	-4.1
100 - 199	55	51	0.7	0.4	-7.3	-1.3
≥200	64	51	0.8	0.4	-20.3	-3.7
Total	**8 284**	**11 972**	**100.0**	**100.0**	**44.5**	**6.3**

Source: Statistics Finland.

Table FIN9: Concentration in Finnish wholesale and commission trade by enterprise size-class (1992)

Enterprise size by number of persons employed	Enterprises			Persons employed			Turnover		
	Number	Share (%)	Cumulative share (%)	Number	Share (%)	Cumulative share (%)	Value (Mio FIM)	Share (%)	Cumulative share (%)
0 - 4	9 710	81.1	81.1	14 231	17.5	17.5	14 777	9.2	9.2
5 - 9	1 054	8.8	89.9	6 780	8.3	25.8	10 104	6.3	15.5
10 - 19	617	5.2	95.1	8 216	10.1	35.9	13 742	8.6	24.1
20 - 49	390	3.3	98.4	11 349	14.0	49.9	17 781	11.1	35.2
50 - 99	99	0.8	99.2	6 767	8.3	58.2	9 886	6.2	41.4
100 - 199	51	0.4	99.6	7 014	8.6	66.8	12 258	7.6	49.0
200 - 499	35	0.3	99.9	10 822	13.3	80.1	33 903	21.1	70.1
≥500	19	0.1	100.0	16 171	19.9	100.0	48 071	29.9	100.0
Total	**11 972**	**100.0**	**100.0**	**81 350**	**100.0**	**100.0**	**160 522**	**100.0**	**100.0**

Source: Statistics Finland.

Table FIN10: Turnover (excluding VAT) in wholesale and commission trade by activity, Finland (1986 - 1992)

Activity	Turnover				Growth (%)	Average annual growth rate (%)	Turnover per enterprise	
	Value (Mio FIM)		Share (%)				Value (1 000 FIM)	
	1986	1992	1986	1992	1992/86	1992/86	1986	1992
Non-specialized wholesale trade	44 569	33 422	31.6	20.8	-25.0	-4.7	1 782 764	1 152 498
Food, beverages, tobacco	11 413	22 162	8.1	13.8	94.2	11.7	17 188	27 193
Textiles, clothing and leather goods	2 670	3 390	1.9	2.1	27.0	4.1	4 421	3 861
Hardware and construction materials	10 978	12 414	7.8	7.7	13.1	2.1	11 830	8 651
Electrical supplies and household appliances	6 053	8 482	4.3	5.3	40.1	5.8	14 411	12 031
Fuels	11 076	15 230	7.8	9.5	37.5	5.5	158 232	173 072
Raw materials	3 592	7 589	2.5	4.7	111.3	13.3	5 002	10 038
Machinery and other capital goods	22 369	33 816	15.9	21.1	51.2	7.1	12 007	11 498
Other products	10 846	13 956	7.7	8.7	28.7	4.3	8 180	6 358
Motor vehicles and motor vehicle parts	14 850	6 921	10.5	4.3	-53.4	-11.9	47 902	17 090
Wholesale trade	**138 416**	**157 384**	**98.1**	**98.0**	**13.7**	**2.2**	**19 979**	**15 359**
Commission trade	**2 728**	**3 138**	**1.9**	**2.0**	**15.0**	**2.4**	**2 012**	**1 819**
Total	**141 144**	**160 522**	**100.0**	**100.0**	**13.7**	**2.2**	**17 038**	**13 408**

Source: Statistics Finland.

Table FIN11: Concentration in Finnish wholesale and commission trade by turnover size-class (1992)

Turnover category (Mio FIM)	Enterprises			Employment			Turnover		
	Number	Share (%)	Cumulative share (%)	Number	Share (%)	Cumulative share (%)	Value (Mio FIM)	Share (%)	Cumulative share (%)
< 0.2	2 350	19.6	19.6	1 772	2.2	2.2	209	0.1	0.1
0.2 < 0.49	2 037	17.0	36.6	2 017	2.5	4.7	680	0.4	0.5
0.5 < 1.99	3 392	28.4	65.0	5 671	7.0	11.7	3 710	2.3	2.8
2 < 9.99	2 769	23.1	88.1	12 078	14.8	26.5	12 471	7.8	10.6
10 < 49.99	1 102	9.2	97.3	17 010	20.9	47.4	23 117	14.4	25.0
50 < 199.99	237	2.0	99.3	12 942	15.9	63.3	22 284	13.9	38.9
200 < 999.99	59	0.5	99.8	13 204	16.2	79.5	26 269	16.4	55.3
≥ 1 000	26	0.2	100.0	16 656	20.5	100.0	71 782	44.7	100.0
Total	**11 972**	**100.0**	**100.0**	**81 350**	**100.0**	**100.0**	**160 522**	**100.0**	**100.0**

Source: Statistics Finland.

Table FIN12: Enterprises engaged in foreign trade, Finland (1992) [1]

Activity	Number of enterprises		
	Total	Engaged in	
		Export	Import
Non-specialized wholesale trade	29	10	16
Food, beverages, tobacco	815	70	192
Textiles, clothing and leather goods	878	95	420
Hardware and construction materials	1 435	153	537
Electrical supplies and household appliances	705	95	381
Fuels	88	7	24
Raw materials	756	82	159
Machinery and other capital goods	2 941	438	1 223
Other products	2 195	206	976
Motor vehicles and motor vehicle parts	405	64	172
Wholesale trade	**10 247**	**1 220**	**4 100**
Commission trade	**1 725**	**84**	**302**
Total	**11 972**	**1 304**	**4 402**

[1] Includes enterprises with imports or exports of FIM 100 000 or more.
Source: Statistics Finland.

Table FIN13: Net investment in wholesale and commission trade enterprises, Finland (1992)

	Total	Land and water areas	Buildings	Machinery and transport equipment	Shares and holdings	Other fixed assets
Wholesale trade	3 315.7	67	470.5	1 237.8	1 080.7	459.7
Commission trade	7.5	0	-0.2	24.8	-17.1	0
Total	**3 323.2**	**67**	**470.3**	**1 262.6**	**1 063.6**	**459.7**

Source: Statistics Finland.

Table FIN14: Enterprises controlled by EU or foreign non EU-residents, Finland [1] (1986 - 1992)

	1986		1989		1992		Growth %
	Number	Share (%)	Number	Share (%)	Number	Share (%)	1992/86
EU-residents	137	1.7	174	1.6	183	1.5	33.6
Non EU-residents	393	4.7	365	3.5	372	3.1	-5.3
Total foreign	530	6.4	539	5.1	555	4.6	4.7
Total	**8 284**	**100.0**	**10 504**	**100.0**	**11 972**	**100.0**	**44.5**

[1] Enterprises are defined as under foreign control if 20% or more of their capital is owned by foreign residents.
Source: Statistics Finland.

Table FIN15: Stucture of expenses as % of turnover, net profit and gross margin in wholesale and commission trade, Finland (1992)

Activity	Materials, supplies	Personnel costs	Rents	Marketing expenses	Depreciation	Interest	Tax	Other	Net profit	Gross margin
Non-specialized wholesale trade	91.9	3.3	2.6	0.7	0.9	2.5	0.1	-1.5	-0.5	9.6
Food, beverages and tobacco	86.9	5.4	1.4	2.1	1.0	1.3	0.2	1.6	0.1	12.1
Textiles, clothing and leather goods	73.4	10.1	2.0	1.7	1.0	3.3	0.7	7.1	0.7	22.7
Hardware and construction materials, electrical supplies and household appliances	77.5	11.5	2.3	1.0	1.4	2.7	0.6	4.1	-1.1	19.5
Fuels and raw materials	83.4	5.5	1.5	0.7	3.0	1.6	0.6	2.6	1.1	16.7
Machinery and other capital goods	70.7	14.5	2.6	1.1	1.9	2.7	0.6	7.1	-1.2	24.3
Other products	68.4	13.9	2.5	2.7	2.7	2.7	1.0	5.1	1.0	29.6
Motor vehicles and motor vehicle parts	75.6	8.4	1.4	3.1	2.5	4.3	0.6	7.8	-3.7	19.1
Wholesale trade	**80.3**	**8.9**	**2.2**	**1.3**	**1.7**	**2.3**	**0.5**	**3.1**	**-0.3**	**18.0**
Commission trade	**33.5**	**27.1**	**4.6**	**2.2**	**3.2**	**22.5**	**0.9**	**5.5**	**0.5**	**66.0**

Source: Statistics Finland.

SVERIGE

1. Introduction

This publication presents data based on the current Swedish classification, which is consistent with NACE Rev. 1, except in Table S16. This table uses the previous Swedish classification, based on ISIC Rev.2.

2. Wholesale trade structure

During the period 1993-1995 the number of wholesale-trade enterprises increased by 7.8%. The largest increases were in food, beverages and tobacco, at 21.9%, and household goods, at 11.1%. During the same period the number of local units increased by 6.5%.

The largest wholesale trade categories in 1995 were household goods, non-agricultural intermediate products and waste and scrap, at about 28% of the total number of enterprises. Next came machinery, equipment and supplies at 25%.
In 1995, 68% of wholesale enterprises were companies, 16% were sole proprietorships and 15% were partnerships.

3. Employment in the wholesale trade

In 1995 wholesale-trade enterprises had a total of 165 808 employees, or 4.8% of all employees in Sweden. There had been little change from the 1993 figure.

There were, however, major changes in employment for the individual wholesaling groups. Wholesale of agricultural raw materials and live animals, wholesale of food, beverages and tobacco and wholesale of household goods increased their employee figures by 5.1%, 11.6% and 9.7% respectively.

All the other groups showed a decline in their number of employees. The most significant drop - of 79% or 3 470 persons - was in the "other wholesale" category. This group already had the smallest share of employees in 1993; by 1995 their share was just 0.5% of the total number of employees. The biggest share of employees in 1995, 28.5%, was in machinery, equipment and supplies.

Companies have the largest number of employees in wholesale trade. In 1995 they had 157 279 employees, or almost 95% of all employees in the wholesale trade. Sole proprietorships accounted for 0.4% and partnerships for 0.8%.

4. Turnover in the wholesale trade

During the period 1990 to 1994, turnover in the wholesale trade increased by 2.6%, but the trend was very different from one group to the next. Turnover in household goods and machinery, equipment and supplies increased by 29% and 23% respectively. The turnover of all the other groups fell.

5. Value added in the wholesale trade

In 1994 the value added in wholesale trade was 23% higher than in 1990. All groups except commission trade increased their value added during the period. The fall for commission trade was 4%.
Value added in wholesale trade in 1994 was SEK 77 000 million, or 5.1% of GDP.

6. Personnel costs in the wholesale trade

Personnel costs in the wholesale trade showed an increase of 6.2% between 1990 and 1994. Costs rose in this period in the food, beverages and tobacco, household goods and machinery and equipment and supplies categories, while the personnel costs for the other groups decreased.

7. Pilot survey of wholesale trade 1991

A pilot survey was carried out for wholesale trade for 1991. At that time the classification used in Sweden was not consistent with NACE Rev. 1, but some figures are nevertheless of interest.

Retailing and wholesaling businesses are the most important category of wholesale-trade customer. According to the pilot survey, 52% of all sales made by the wholesale trade were to this category. The second most important category of customer was manufacturing firms, which accounted for 20% of the total sales of the wholesale trade.

Table S1: Number of wholesale and commission trade enterprises by activity, Sweden (1993 - 1995)

Activity	Enterprises						Growth (%)	Average annual growth rate (%)
	Number			Share (%)				
	1993	1994	1995	1993	1994	1995	1995/93	1995/93
Agricultural raw materials and live animals	768	808	846	2.1	2.1	2.2	10.2	5.0
Food, beverages and tobacco	2 673	2 975	3 258	7.4	7.9	8.4	21.9	10.4
Non-food household goods	9 737	10 202	10 817	26.9	27.1	27.7	11.1	5.4
Non-agricultural intermediate products, waste and scrap	10 285	10 716	10 774	28.4	28.5	27.6	4.8	2.3
Machinery, equipment and supplies	9 434	9 666	9 906	26.1	25.7	25.4	5.0	2.5
Other wholesale	375	393	404	1.0	1.0	1.0	7.7	3.8
Commission trade	**2 907**	**2 888**	**2 987**	**8.0**	**7.7**	**7.7**	**2.8**	**1.4**
Total	**36 179**	**37 648**	**38 992**	**100.0**	**100.0**	**100.0**	**7.8**	**3.8**

Source: Business Register.

Table S2: Number of wholesale and commission trade local units by activity, Sweden (1993 - 1995)

Activity	Local units						Growth (%)	Average annual growth rate (%)
	Number			Share (%)				
	1993	1994	1995	1993	1994	1995	1995/93	1995/93
Agricultural raw materials and live animals	1 062	1 084	1 116	2.7	2.6	2.6	5.1	2.5
Food, beverages and tobacco	2 981	3 263	3 520	7.5	8.0	8.3	18.1	8.7
Non-food household goods	10 355	10 805	11 452	26.2	26.4	27.2	10.6	5.2
Non-agricultural intermediate products, waste and scrap	11 503	11 879	11 874	29.1	29.0	28.2	3.2	1.6
Machinery, equipment and supplies	10 299	10 468	10 705	26.0	25.6	25.4	3.9	2.0
Other wholesale	389	411	410	1.0	1.0	1.0	5.4	2.7
Commission trade	**3 003**	**3 001**	**3 100**	**7.6**	**7.3**	**7.3**	**3.2**	**1.6**
Total	**39 592**	**40 911**	**42 177**	**100.0**	**100.0**	**100.0**	**6.5**	**3.2**

Source: Business Register.

Table S3: Number of wholesale and commission trade employees by activity, Sweden (1993 - 1995)

Activity	Employees						Growth (%)	Average annual growth rate (%)
	Number			Share (%)				
	1993	1994	1995	1993	1994	1995	1995/93	1995/93
Agricultural raw materials and live animals	5 488	5 788	5 769	3.3	3.6	3.5	5.1	2.5
Food, beverages and tobacco	21 128	21 578	23 587	12.8	13.5	14.2	11.6	5.7
Non-food household goods	34 100	33 688	37 410	20.6	21.1	22.6	9.7	4.7
Non-agricultural intermediate products, waste and scrap	45 446	43 458	43 549	27.5	27.2	26.3	-4.2	-2.1
Machinery, equipment and supplies	47 339	44 306	47 288	28.6	27.7	28.5	-0.1	-0.1
Other wholesale	4 371	4 079	901	2.6	2.5	0.5	-79.4	-54.6
Commission trade	**7 578**	**7 076**	**7 304**	**4.6**	**4.4**	**4.4**	**-3.6**	**-1.8**
Total	**165 450**	**159 973**	**165 808**	**100.0**	**100.0**	**100.0**	**0.2**	**0.1**

Source: Business Register.

Table S4: Number of wholesale and commission trade enterprises by employment size-class, Sweden (1995)

Activity	Number of enterprises					
	Total	Employment size-class				
		0	1-9	10-99	100-499	≥ 500
Agricultural raw materials and live animals	846	443	327	64	11	1
Food, beverages and tobacco	3 258	1 868	1 050	300	34	6
Non-food household goods	10 817	6 271	3 804	704	34	4
Non-agricultural intermediate products, waste and scrap	10 774	5 393	4 539	796	41	5
Machinery, equipment and supplies	9 906	4 576	4 348	934	44	4
Other wholesale	404	233	141	30	0	0
Commission trade	**2 987**	**1 662**	**1 182**	**138**	**4**	**1**
Total	**38 992**	**20 446**	**15 391**	**2 966**	**168**	**21**

Source: Business Register.

Table S5: Number of wholesale and commission trade local units by employment size-class, Sweden (1995)

Activity	Local units					
	Total	Employment size-class				
		0	1-9	10-99	100-499	≥ 500
Agricultural raw materials and live animals	1 116	463	512	137	4	0
Food, beverages and tobacco	3 520	1 869	1 153	445	52	1
Non-food household goods	11 452	6 284	4 274	868	26	0
Non-agricultural intermediate products, waste and scrap	11 874	5 407	5 380	1 056	31	0
Machinery, equipment and supplies	10 705	4 592	4 987	1 090	34	2
Other wholesale	410	233	148	28	1	0
Commission trade	**3 100**	**1 665**	**1 286**	**146**	**2**	**1**
Total	**42 177**	**20 513**	**17 740**	**3 770**	**150**	**4**

Source: Business Register.

Table S6: Number of wholesale and commission trade enterprises by number of local units, Sweden (1995)

Activity	Number of enterprises						
	Total	Local units size-class					
		1	2	3-4	5-9	10-49	≥ 50
Agricultural raw materials and live animals	846	814	12	8	3	9	0
Food, beverages and tobacco	3 258	3 193	33	18	8	6	0
Non-food household goods	10 817	10 602	116	67	16	15	1
Non-agricultural intermediate products, waste and scrap	10 774	10 500	124	87	39	21	3
Machinery, equipment and supplies	9 906	9 572	156	131	33	14	0
Other wholesale	404	398	3	3	0	0	0
Commission trade	**2 987**	**2 919**	**41**	**24**	**3**	**0**	**0**
Total	**38 992**	**37 998**	**485**	**338**	**102**	**65**	**4**

Source: Business Register.

Table S7: Number of employees of wholesale and commission trade by employment size-class, Sweden (1995)

Activity	Number of employees				
	Total	Employment size-class			
		1-9	10-99	100-499	≥ 500
Agricultural raw materials and live animals	5 769	1 019	1 407	2 753	590
Food, beverages and tobacco	23 587	3 261	7 029	7 384	5 913
Non-food household goods	37 410	10 648	17 156	6 550	3 056
Non-agricultural intermediate products, waste and scrap	43 549	13 537	17 448	8 060	4 504
Machinery, equipment and supplies	47 288	13 283	21 172	8 494	4 339
Other wholesale	901	421	480	0	0
Commission trade	**7 304**	**3 010**	**2 930**	**773**	**591**
Total	**165 808**	**45 179**	**67 622**	**34 014**	**18 993**

Source: Business Register.

Table S8: Number of employees of wholesale and commission trade local units by employment size-class, Sweden (1995)

Activity	Number of employees				
	Total	Employment size-class			
		1-9	10-99	100-499	≥ 500
Agricultural raw materials and live animals	5 656	1 716	3 329	611	0
Food, beverages and tobacco	24 482	3 751	10 853	9 268	610
Non-food household goods	36 664	12 132	20 124	4 408	0
Non-agricultural intermediate products, waste and scrap	43 277	16 536	21 760	4 981	0
Machinery, equipment and supplies	47 130	15 328	23 992	5 964	1 846
Other wholesale	1 063	450	463	150	0
Commission trade	**7 460**	**3 302**	**3 183**	**384**	**591**
Total	**165 732**	**53 215**	**83 704**	**25 766**	**3 047**

Source: Business Register.

Table S9: Number of employees of wholesale and commission trade enterprises by number of local units, Sweden (1995)

Activity	Number of employees						
	Total	Local units size class					
		1	2	3-4	5-9	10-49	≥ 50
Agricultural raw materials and live animals	5 769	1 844	263	376	310	2 976	0
Food, beverages and tobacco	23 587	10 727	3 494	2 879	1 372	5 115	0
Non-food household goods	37 410	23 631	3 568	3 716	1 268	4 350	877
Non-agricultural intermediate products, waste and scrap	43 549	25 572	3 073	3 261	3 290	5 708	2 645
Machinery, equipment and supplies	47 288	27 591	3 546	7 092	3 752	5 307	0
Other wholesale	901	826	27	48	0	0	0
Commission trade	**7 304**	**5 273**	**731**	**993**	**307**	**0**	**0**
Total	**165 808**	**95 464**	**14 702**	**18 365**	**10 299**	**23 456**	**3 522**

Source: Business Register.

Table S10: Number of wholesale and commission trade enterprises by type of legal status, Sweden (1995)

Activity	Number of enterprises					
	Total	Type of legal status				
		Sole proprietorship	Partnership	Company	Non-profit organization	Other
Agricultural raw materials and live animals	846	183	135	454	60	14
Food, beverages and tobacco	3 258	695	510	1 997	37	19
Non-food household goods	10 817	1 854	2 106	6 707	30	120
Non-agricultural intermediate products, waste and scrap	10 774	1 661	1 321	7 598	27	167
Machinery, equipment and supplies	9 906	1 038	1 205	7 532	8	123
Other wholesale	404	44	85	269	2	4
Commission trade	**2 987**	**581**	**485**	**1 873**	**18**	**30**
Total	**38 992**	**6 056**	**5 847**	**26 430**	**182**	**477**

Source: Business Register.

Table S11: Number of employees of wholesale and commission trade enterprises by type of legal status, Sweden (1995)

Activity	Number of employees					
	Total	Type of legal status				
		Sole proprietorship	Partnership	Company	Non-profit organization	Other
Agricultural raw materials and live animals	5 769	61	57	2 106	3 542	3
Food, beverages and tobacco	23 587	98	142	22 323	599	425
Non-food household goods	37 410	112	417	36 204	233	444
Non-agricultural intermediate products, waste and scrap	43 549	257	419	42 399	87	387
Machinery, equipment and supplies	47 288	63	185	46 331	361	348
Other wholesale	901	4	48	843	0	6
Commission trade	**7 304**	**24**	**69**	**7 073**	**51**	**87**
Total	**165 808**	**619**	**1 337**	**157 279**	**4 873**	**1 700**

Source: Business Register.

Table S12: Wholesale and commission trade turnover, excluding VAT, by activity, Sweden (1990 - 1994) [1]

Activity	Turnover						Growth (%)	Average annual growth rate (%)
	Value (Mio SEK)			Share (%)				
	1990	1993	1994	1990	1993	1994	1994/90	1994/90
Agricultural raw materials and live animals and other	32 202	23 661	25 285	5.5	4.3	4.2	-21.5	-5.9
Food, beverages and tobacco	135 689	132 659	134 668	23.2	24.3	22.4	-0.8	-0.2
Non-food household goods	83 950	89 327	108 165	14.3	16.4	18.0	28.8	6.5
Non-agricultural intermediate products, waste and scrap	205 262	162 775	190 011	35.1	29.9	31.6	-7.4	-1.9
Machinery, equipment and supplies	91 771	109 956	112 904	15.7	20.2	18.8	23.0	5.3
Commission trade	**36 484**	**26 914**	**29 515**	**6.2**	**4.9**	**4.9**	**-19.1**	**-5.2**
Total	**585 358**	**545 292**	**600 548**	**100.0**	**100.0**	**100.0**	**2.6**	**0.6**

[1] Data for 1990 contain only companies with employees or with a turnover exceeding 50 000 SEK.
Source: Financial Accounts and Tax Returns.

Table S13: Wholesale and commission trade value added by activity, Sweden (1990 - 1994) [1]

Activity	Value added						Growth (%)	Average annual growth rate (%)
	Value (Mio SEK)			Share (%)				
	1990	1993	1994	1990	1993	1994	1994/90	1994/90
Agricultural raw materials and live animals and other wholesale	2 158	2 148	2 353	3.4	3.3	3.1	9.0	2.2
Food, beverages and tobacco	7 647	8 664	8 487	12.2	13.3	11.0	11.0	2.6
Non-food household goods	11 365	12 265	15 726	18.2	18.8	20.4	38.4	8.5
Non-agricultural intermediate products, waste and scrap	21 518	18 984	24 503	34.4	29.2	31.8	13.9	3.3
Machinery, equipment and supplies	16 458	20 576	22 648	26.3	31.6	29.4	37.6	8.3
Commission trade	**3 423**	**2 483**	**3 283**	**5.5**	**3.8**	**4.3**	**-4.1**	**-1.0**
Total	**62 569**	**65 120**	**77 000**	**100.0**	**100.0**	**100.0**	**23.1**	**5.3**

[1] Data for 1990 contain only companies with employees or with a turnover exceeding 50 000 SEK.
Source: Financial Accounts and Tax Returns.

Table S14: Wholesale and commission trade personnel costs by activity, Sweden (1990 - 1994)

Activity	Personnel costs						Growth (%)	Average annual growth rate (%)
	Value (Mio SEK)			Share (%)				
	1990	1993	1994	1990	1993	1994	1994/90	1994/90
Agricultural raw materials and live animals and other wholesale	2 088	1 656	1 722	4.5	3.6	3.5	-17.5	-4.7
Food, beverages and tobacco	5 942	6 330	6 507	12.9	13.8	13.3	9.5	2.3
Non-food household goods	8 587	8 910	9 787	18.6	19.4	20.0	14.0	3.3
Non-agricultural intermediate products, waste and scrap	13 522	12 337	12 858	29.3	26.9	26.3	-4.9	-1.3
Machinery, equipment and supplies	13 243	14 821	15 873	28.7	32.3	32.4	19.9	4.6
Commission trade	**2 708**	**1 824**	**2 192**	**5.9**	**4.0**	**4.5**	**-19.1**	**-5.1**
Total	**46 090**	**45 878**	**48 939**	**100.0**	**100.0**	**100.0**	**6.2**	**1.5**

[1] Data for 1990 contain only companies with employees or with a turnover exceeding 50 000 SEK.
Source: Financial Accounts and Tax Returns.

Table S15: Wholesale and commission trade enterprise characteristics by employment size-class, Sweden (1994)

Activity	Personnel costs (Mio SEK)		Turnover excluding VAT (Mio SEK)			Value added at market prices (Mio SEK)			Net investment (Mio SEK)		
	Number of employees										
	≥1	Total	0	≥1	Total	0	≥1	Total	0	≥1	Total
Agricultural raw materials and live animals and other wholesale	1 722	1 722	328	24 957	25 285	36	2 317	2 353	0	300	300
Food, beverages and tobacco	6 507	6 507	654	134 014	134 668	61	8 426	8 487	10	375	385
Non-food household goods	9 787	9 787	781	107 384	108 165	161	15 565	15 726	15	921	936
Non-agricultural intermediate products, waste and scrap	12 858	12 858	899	189 112	190 011	204	24 299	24 503	23	2 166	2 189
Machinery, equipment and supplies	15 873	15 873	559	112 345	112 904	125	22 523	22 648	9	591	600
Commission trade	**2 192**	**2 192**	**241**	**29 274**	**29 515**	**64**	**3 219**	**3 283**	**3**	**275**	**278**
Total	**48 939**	**48 939**	**3 462**	**597 086**	**600 548**	**651**	**76 349**	**77 000**	**60**	**4 628**	**4 688**

Source: Financial Accounts and Tax Returns.

Table S16: Sales by category of customer for the wholesale trade, Sweden (1991)

Customer	Share (%)
Manufacturing companies	20
Retailing and wholesaling businesses	52
Banks, financial and insurance companies	1
Other service companies	7
State and local governments	6
Households and private persons	4
Foreign sales	10

Source: Pilot survey on wholesale trade 1991.

Table S17: Geographical distribution of wholesale trade local units, Sweden (1994)

County/province	Local units	Population	Number of local unit per 10 000 inhabitants	Number of employees	Number of employees per local unit	Land area (Km²)	Number of local units per km²
Stockholms län	11 789	1 708 502	69.0	54 745	4.64	6 490	1.82
Uppsala län	913	286 642	31.9	2 725	2.98	6 989	0.13
Södermanlands län	724	259 793	27.9	2 344	3.24	6 060	0.12
Östergötlands län	1 517	415 603	36.5	5 746	3.79	10 562	0.14
Jönköpings län	1 516	312 494	48.5	5 128	3.38	9 944	0.15
Kronobergs län	713	180 747	39.4	4 292	6.02	8 458	0.08
Kalmar län	771	244 057	31.6	1 880	2.44	11 171	0.07
Gotlands län	142	58 237	24.4	492	3.46	3 140	0.05
Blekinge län	392	153 016	25.6	1 013	2.58	2 941	0.13
Kristianstads län	1 291	294 571	43.8	3 852	2.98	6 089	0.21
Malmöhus län	4 759	811 415	58.7	19 004	3.99	4 938	0.96
Hallands län	1 272	268 067	47.5	4 436	3.49	5 454	0.23
Göteborg och Bohus län	4 797	764 594	62.7	20 646	4.30	5 141	0.93
Älvsborgs län	2 057	449 767	45.7	5 469	2.66	11 395	0.18
Skaraborgs län	924	279 921	33.0	3 038	3.29	7 937	0.12
Värmlands län	985	285 498	34.5	3 245	3.29	17 586	0.06
Örebro län	1 006	276 828	36.3	4 007	3.98	8 519	0.12
Västmanlands län	750	261 753	28.7	3 958	5.28	6 302	0.12
Kopparbergs län	931	291 203	32.0	2 913	3.13	28 193	0.03
Gävleborgs län	955	289 654	33.0	2 731	2.86	18 192	0.05
Västernorrlands län	994	260 295	38.2	3 237	3.26	21 678	0.05
Jämtlands län	337	136 301	24.7	959	2.85	49 443	0.01
Västerbottens län	723	259 775	27.8	2 743	3.79	55 401	0.01
Norrbottens län	653	267 648	24.4	2 054	3.15	98 911	0.01
Total	**40 911**	**8 816 381**	**46.4**	**160 657**	**3.93**	**410 934**	**0.10**

Source: Business Register and Statistical yearbook of Sweden.

UNITED KINGDOM

1. Introduction

There is little tradition of analysing wholesaling in its entirety in the United Kingdom. The wholesale industry has no single employer's association to monitor the changes and influences to the wholesale trade, nor is there evidence that much academic research on the trade as a whole has been carried out in recent years. As a result, the data that have been collected across the trade are mainly for national accounts or employment statistics purposes. Until 1995, much of the economic data were collected on a trade classification used in the administration of VAT and constructed over twenty-five years ago. Employment data have been converted to a basis consistent with NACE Rev. 1, but this conversion has not yet been carried out for detailed historic economic data.

One area to receive more attention has been the wholesale grocery trade. Some additional information is therefore provided on this at the end of the chapter. Conversely, much of the data about "wholesaling is grouped under the miscellaneous category 'wholesaling of other goods' ". Whilst this includes wholesale of distinct products such as electrical goods, paper and board products and chemists' sundries, further subdivision of the figures is not available.

Specialist wholesalers include customer-specific wholesalers such as catering wholesale suppliers. They also include product-specific wholesalers, such as confectionery, drinks, ethnic foods and frozen foods wholesale suppliers.

2. The role of wholesale trade in the British economy

Statistics produced by the Office for National Statistics (ONS) show that there were 1 672 000 VAT-registered businesses in 1993. Of these 8.6% or 144 000 had wholesaling and dealing as their main activity.

In the UK in 1993, 37% of the population worked as paid employees, that is 22 million persons. The wholesale trade accounted for 4.1% of the total of employees in employment. This compare with 10.1% in the retail trades and 2.4% in the motor trades.

Gross domestic product in the United Kingdom in 1993 was GBP 548 billion. The wholesale sector accounted for 4.7% of GDP or GBP 26 billion.

3. Wholesale activity in Great Britain

The annual wholesaling inquiries conducted by the ONS broadly covered all businesses registered for VAT within Division 51 of NACE Rev. 1, but also included some activity on the renting and leasing of equipment. The geographical coverage in the past was confined to Great Britain, that is England, Scotland and Wales: the United Kingdom also includes Northern Ireland. This distinction is made where necessary in the text and tables.

3.1. Wholesale trade by activity

The turnover of the wholesale trade within Great Britain grew overall by 32% between 1990 and 1994, from GBP 225 billion to GBP 297 billion. The highest growth rate over the four years was 75% and is ascribed to the wholesale of petroleum products. The relevant annual publication, however, attributes this to the fact that '....a number of businesses in England, Scotland and Wales are also engaged in activities outside Great Britain which they cannot separately identify and may lead to year on year fluctuations in the figures. In such cases, these elements of their activities are also included'. This increase was closely followed by dealing in industrial and agricultural machinery which grew by 70% and so may have been the largest genuine increase. Turnover of the wholesale of food and drink; clothing, furs and textiles; coal and oil merchants; and builders' merchants also increased over the four years.

The turnover of corn, seed and agricultural merchants, dealers in livestock; dealers in industrial materials; dealers in scrap and other waste materials and operational leasing all contracted in size over the four years. The turnover of dealers in scrap metal fell most sharply, by 29%. However, this was partly due to the reclassification of some enterprises: the turnover of dealers in industrial materials fell by less than 1%.

Wholesale revenue comes from the sale of goods to other wholesalers, retailers, the general public, for export, to agricultural organisations, the construction industry and others. It is difficult to produce an analysis of sales by type of customer, but a broad breakdown for 1990 is presented in Table UK3.

3.2. Wholesale activity by size of business

The turnover size ranges which contained the greatest number of enterprises in the United Kingdom in 1995 were the smallest turnover band, that is GBP 1 000 to GBP 49 000 with 20% of enterprises, and the turnover band GBP 100 000 to GBP 249 000 also with 20%. In the same year 79% of wholesaling enterprises had a turnover of less than GBP 1 million. Only 2% of the enterprises had a turnover greater than GBP 10 million.

The tables show that 81% of the total UK turnover is produced by about 5% of the enterprises. On the other hand, the largest proportion of the enterprises, that is the 20% in the GBP 1 000 to 49 000 turnover category, account for only 0.2% of the total wholesale turnover.

4. Number of enterprises

Table UK5 provides a largely consistent series of counts of enterprises in the UK from a register source over the period 1990 to 1994. It shows growth in the number until 1993 and, even with a fall in 1994, the growth over the period was about 7%.

The strongest growth between 1990 and 1994 was in the miscellaneous category of wholesale of other goods, which increased by about a quarter and formed much the most numerous of the categories identified.

The number of wholesalers of food and drink had grown in the earlier years of the period but in 1994 was a little below its 1990 level. There were steeper falls in the categories of coal and oil merchants and builders' merchants and in dealers in industrial materials.

5. Employment

An analysis of employment (covering paid employees) for the years 1986 to 1995 is given for Great Britain in Table UK6 on a consistent Division 51 of NACE Rev. 1 basis. The number of employees grew from 1986 to 1989/1990 but then fell sharply in 1991. Employment in the wholesale trades subsequently recovered in part but at about 940 000 in 1995 remains below its 1989/1990 peak.

The proportion of female employees in the total was very stable over the period, largely within the range 32-34%. The proportions of full-time and part-time employees differed markedly, however. In 1995, for example, over 70% of part-time employees were female: the corresponding proportion for full-time employees was little over a quarter.

Part-time employment has been a quite significant feature of the wholesale trade over the period and in 1995 about 13% of the total employees worked part-time.

An alternative source of information for 1990 on employment is presented in Table UK6 which provides more detail and covers the self-employed working within wholesaling.

The largest employer by category is wholesale of other goods with a total of 523 000 persons employed or 42% of the total for all wholesaling. The second largest employer, with 20% of the total, is wholesaling of food and drink.

The number of self-employed within the wholesaling industry accounts for 12% of all wholesaling employment. The highest proportion of self-employed is in the coal and oil merchants sector, with 29% being working owners.

6. Wholesaling activity by geographical distribution

No information is available on the geographic distribution of wholesale local units, but Table UK7 gives an analysis by region of enterprises by their head office location.

The majority of wholesalers are based in the South East Region, which accounts for 40% of all enterprises. The smallest proportion is in Northern Ireland with under 3%. The proportions naturally reflect the broad distribution of population and economic activity within the United Kingdom.

Geographical expansion by the major operators is continuing at a cautious pace, with more chains seeking national presence. However, evidence of the saturation of depot operations is being witnessed through the recent closure of cash and carries outlets in particular conurbations.

7. Grocery trade in the wholesale sector

Grocery wholesalers form an important part of wholesaling in the United Kingdom. This sector can be split into two components - with and without cash and carry facilities, although there are some wholesalers who operate both a cash and carry and delivery service from the same location.

Unofficial sources estimate that the wholesale grocery trade (a much narrower concept than the wholesale of food and drink used, for example, in Table UK2) was worth approximately GBP 12.3 billion in 1994, an increase of GBP 0.3 billion on 1993. The cash and carry side accounts for 75% of the market. However, this did not expand as quickly as the delivered side of the market in 1994.

Over the past few years factors such as the entry into the market of food-discounters, out-of-town supermarkets and Sunday opening have all had a detrimental effect on the takings of the grocery wholesaler. These factors are affecting the independent grocer within the retail sector and thus having a knock-on effect on the grocery wholesaler. The decline of the independent grocer has been a long-term phenomenon: in 1960 independent grocers accounted for 50% of UK retail food sales but by 1994 they only accounted for 10%. To counteract these changes, many wholesalers have increased the range of their customers to include the catering trade, off-licences (that is, specialist drinks retailers) and clubs as well as the independent grocery retailer. Other wholesalers have challenged these problems by changing their product areas. Another way wholesalers have tried to increase their profit margins is by introducing their own brand products. Wholesalers are now investing more heavily in information technology, especially in their stock control departments.

Table UK1: The role of trade in the United Kingdom economy (1993)

	Value	Share (%)
a) Number of enterprises		
Total number of enterprises [1]	1 671 611	100.0
Wholesale and commission trade [2]	143 820	8.6
b) Employment (1 000)		
Total resident population	58 191	
Total employment	21 656	100.0
Persons employed in distributive trades		
Wholesale and commission trade (employees in employment) [3]	890	4.1
Retail trade [3]	2 187	10.1
Motor trades [3]	525	2.4
c) Gross domestic product (Mio GBP)		
Gross domestic product	547 870	100.0
Value added of the wholesale and commission trade sector	25 554	4.7

[1] Enterprise counts from register analyses include enterprises with zero turnover.
[2] Based on 1968 UK classification.
[3] Based on NACE Rev. 1.
Source: Office for National Statistics.

Table UK2: Wholesale and commission trade turnover by activity, Great Britain (1990 - 1994)

Activity	Value (Mio GBP)			Share (%)			Growth (%)
	1990	1993	1994	1990	1993	1994	1994/90
Food and drink [1]	47 286	49 494	52 539	21.0	18.4	17.6	11.1
Petroleum products	21 660	34 667	37 871	9.6	13.0	12.8	74.8
Clothing, furs, textiles and footwear	9 587	12 039	11 142	4.3	4.5	3.8	16.2
Other goods	79 495	103 957	117 520	35.3	38.9	39.6	47.8
Coal and oil	2 340	2 017	2 948	1.0	0.8	1.0	26.0
Building materials	8 540	8 284	9 415	3.8	3.1	3.1	10.3
Corn, seed and agricultural materials, livestock	8 351	8 029	8 183	3.6	3.0	2.8	-2.0
Industrial materials	26 967	23 903	26 827	12.0	8.8	9.0	-0.5
Scrap and other waste materials	2 922	2 532	2 062	1.3	1.0	0.7	-29.4
Industrial and agricultural machinery	15 218	20 769	25 806	6.7	7.8	8.7	69.6
Operational leasing	3 095	1 913	2 582	1.4	0.7	0.9	-16.6
Total	**225 461**	**267 604**	**296 895**	**100.0**	**100.0**	**100.0**	**31.7**

[1] Excluding slaughterhouses.
Source: Office for National Statistics, Annual wholesaling inquiries.

Table UK3: Receipts for sales and services, Great Britain (1990)

Activity	Value (Mio GBP)	Other wholesale	Retailers	General public	Export	Agricultural organizations	Construction industry	Other
		(%)						
Food and drink	45 705	19.9	56.5	1.7	4.0	0.2	0.0	17.7
Petroleum products	21 459	20.2	18.3	2.8	13.1	1.2	0.6	43.8
Clothing, furs, textiles and footwear	9 349	17.8	44.5	2.5	13.4	0.2	0.3	21.3
Other goods	77 026	29.2	23.2	1.8	11.5	1.3	4.1	29.0
Coal and oil	1 896	47.4	25.2	3.1	8.4	1.8	1.5	12.6
Building materials	8 391	5.3	8.1	6.5	0.7	0.2	65.0	14.2
Corn, seed and agricultural materials, livestock	8 119	20.2	4.3	2.5	10.4	52.0	0.4	10.1
Industrial materials	26 475	23.7	1.3	0.3	18.6	1.0	6.3	48.7
Scrap and other waste materials	2 749	19.9	2.9	4.1	11.8	0.0	2.1	59.3
Industrial and agricultural machinery	14 827	5.3	8.6	2.6	11.5	7.6	11.0	53.4
Operational leasing	2 941	19.4	14.7	1.2	5.9	0.4	2.7	55.7
Total	**218 938**	**22.3**	**25.3**	**2.0**	**10.5**	**3.2**	**5.6**	**31.1**

Source: Office for National Statistics.

Table UK4: Concentration by turnover category in wholesale and commission trade, United Kingdom (1995)

Turnover category (1 000 GBP)	Enterprises		Turnover
	Number	Share (%)	Share (%)
1-49	25 800	20.3	0.2
50-99	19 510	15.4	0.4
100-249	25 215	19.9	1.0
250-499	16 385	12.9	1.8
500-999	14 405	11.4	2.9
1 000-4 999	19 255	15.2	12.9
≥5 000	6 230	4.9	80.8
Total	**126 800**	**100.0**	**100.0**

Source: Office for National Statistics, Register analyses.

Table UK5: Number of wholesale and commission trade enterprises [1] by activity, United Kingdom (1990 - 1994)

Activity	1990	1991	1992	1993	1994
Food and drink	16 593	16 532	17 596	17 256	16 385
Petroleum products	1 068	1 098	1 124	1 102	1 013
Clothing, furs, textiles and footwear	10 474	10 558	11 392	11 300	10 622
Chemists' sundries	1 290	1 322	1 423	1 387	1 281
Clocks and watches	261	273	268	255	219
Electrical goods	5 971	6 430	6 883	6 725	6 120
Radios, TV sets, tape recorders	1 525	1 500	1 548	1 447	1 335
Jewellery	1 667	1 695	1 784	1 718	1 636
Imitation jewellery, toys and other goods	1 827	1 868	1 934	1 907	1 751
Travel and fancy goods	1 079	1 085	1 166	1 118	1 009
Furniture and floor coverings	3 410	3 471	3 577	3 391	3 137
China, glassware, hardware and ironmongery	2 721	2 810	2 939	2 810	2 544
Paper and board products including reading material	3 826	3 976	4 308	4 368	4 000
Other goods	35 778	38 504	47 352	48 882	45 245
Coal and oil	3 430	3 531	3 603	3 394	3 075
Building material	4 772	4 624	4 570	4 522	4 222
Corn, seed and agricultural materials, livestock	3 154	3 104	3 336	3 246	3 013
Industrial materials	6 050	6 257	6 694	6 518	5 777
Scrap and other waste materials	3 928	3 851	3 783	3 566	3 234
Industrial and agricultural machinery	8 786	9 123	9 904	10 158	9 386
Operational leasing	3 579	4 581	4 526	4 300	4 095
Total	**121 189**	**126 193**	**139 710**	**139 370**	**129 099**

[1] Counts for 1993 and earlier years are strictly of legal units rather than enterprises but the discontinuity with data for 1994 is small.
Source: Office for National Statistics - Register analyses (excluding enterprises with zero turnover).

Table UK6: Employment characteristics of wholesale and commission trade, Great Britain [1] (1986 - 1995)

	1986	1987	1988	1989	1990	1991	1992	1993	1994	1995
Wholesale and commission trade employees (1 000)	**914.6**	**919.9**	**944.8**	**977.5**	**974.2**	**908.5**	**884.3**	**864.8**	**897.9**	**936.2**
Female employees	303.8	309.2	316.4	332.1	326.1	298.3	292.0	288.5	296.9	302.6
Part-time	98.7	98.7	96.8	100.8	100.3	87.3	84.4	85.1	91.2	89.9
Full-time	205.1	210.5	219.6	231.3	225.8	211.0	207.6	203.4	205.7	212.7
Male employees	610.8	610.7	628.4	645.3	648.1	610.1	592.3	576.3	601.0	633.7
Part-time	:	:	:	:	29.6	26.0	26.2	26.3	28.8	33.3
Full-time	:	:	:	:	618.5	584.1	566.1	550.0	572.2	600.4
Female share (%)	33.2	33.6	33.5	34.0	33.5	32.8	33.0	33.3	33.0	32.3

[1] Division 51 of NACE Rev. 1.
Source: Office for National Statistics - Annual employment inquiries.

Table UK7: Form of employment in wholesale and commission trade by activity, Great Britain (1990)

Activity	Employment (1 000)			
	Number	Share (%)	Employees	Self-employed
Food and drink [1]	254	20.3	233	22
Petroleum products	35	2.8	34	1
Clothing, furs, textiles and footwear	72	5.8	59	13
Other goods	523	41.9	451	73
Coal and oil	14	1.1	11	4
Building materials	75	6.0	69	6
Corn, seed and agricultural materials, livestock	27	2.2	23	4
Industrial materials	79	6.3	73	7
Scrap and other waste materials	30	2.4	25	5
Industrial and agricultural machinery	112	9.0	102	10
Operational leasing	28	2.2	25	3
Total	**1 249**	**100.0**	**1 104**	**146**

[1] Excluding slaughterhouses.
Source: Office for National Statistics - Annual wholesaling inquiry.

Table UK8: Geographical distribution of wholesale enterprises, United Kingdom (1995)

	Enterprises [2]	
Regions [1]	**Number**	**Share (%)**
South-East	50 740	40.0
North-West	13 040	10.3
West Midlands	11 880	9.4
Yorkshire and Humberside	9 770	7.7
South-West	9 625	7.6
East Midlands	9 090	7.2
Scotland	6 850	5.4
North	3 235	2.5
Wales	4 285	3.4
East Anglia	4 575	3.6
Northern Ireland	3 705	2.9
Total	**126 800**	**100.0**

[1] Regional allocation relates to head office of enterprises.
[2] The figures have been rounded. Component items do not add precisely to the total shown.
Source: Office for National Statistics - Register analyses (excluding enterprises with zero turnover).

ICELAND

1. Introduction and key statistics

After Liechtenstein, Iceland has the smallest population within the European Economic Area (EEA). Nevertheless its area is almost two and a half times that of Denmark, whose population exceeds five million. Iceland's population of 268 000 inhabitants is unevenly distributed over a total area of 103 000 square kilometres. As the interior of the country is virtually uninhabitable, the population is concentrated along the coast, mainly on the Reykjanes peninsula in the south-west where Reykjavik is located. Over 60% of the population live within 60 kilometres of the centre of Reykjavik.

The Icelandic economy relies heavily on the use of its natural resources, especially fish and, in the past few decades, energy.

The development of its various industries and retailing is influenced by the small size of the economy and its fluctuations. For example, of the roughly 3 000 enterprises in wholesale and retail trade, only 68 employ more than 30 persons.

Compilation methods for statistics in Iceland often differ from those in other countries. They are not generally based on questionnaires collecting information directly from businesses, but to a great extent on administrative registers such as those for tax records and tax-assessment data. The advantage of these methods is that they are cheap. However, statistics become a by-product of sources which are organised for other purposes and changes in tax legislation damage the continuity of statistics. Another drawback is a lack of data on the detail of production or sales.

This chapter is based on statistics almost entirely derived from administrative registers. In the statistics presented here, the following categories of industry are classified as wholesale trade:

a) Export trade.
b) Wholesale distribution of alcohol and tobacco, retailing of alcohol.
c) Wholesale and retail distribution of gasoline and other petroleum products.
d) Wholesale and retail distribution of building materials (not for resale).
e) Wholesale and retail distribution of motor vehicles and parts and accessories for them.
f) Wholesale trade not elsewhere classified.

In 1994 the category of wholesale trade not elsewhere classified had 1 116 outlets out of the 1 444 outlets in wholesale trade. Iceland is still following the 1958 version of ISIC but a classification based on NACE Rev. 1 will soon be introduced to ensure better comparability with the countries of the European Union.

2. The role of trade in the Icelandic economy

The number of enterprises in Iceland was around 26 563 in 1994. Out of this total there were 3 115 enterprises in wholesale and retail trade with 1 431, a little less than a half of them, in wholesale trade. A better measure of the importance of trade is the contribution to GDP and, by that measure, in 1990 wholesale and retail trade together accounted for around 11% of gross value added and provided employment to 12% of the labour force. The share of trade in GDP was high in 1992 compared to previous years. Over the last twenty years the highest percentage share was in 1990, and during the period 1981-1990 the share fluctuated between 9 and 11%, exceeding 11% only twice - in 1983 and 1990. In the period 1990-1993 the share of trade in GDP has, however, been over 11%.

Within trade in total, retailing accounted for approximately 40% of value added during the last few years and the relative importance of retail trade has increased compared to wholesale trade.

During the 1980s the distributive trades reflected fluctuations in GDP and household consumption. The fluctuations in wholesale trade were greater than in retailing because, by the Icelandic definition, wholesale trade includes consumer durables such as cars, the demand for which is highly sensitive to economic fluctuations. The volume index for wholesale trade increased by 43% from 1980 to 1990. The corresponding increase in retail trade was 29% and the overall growth of the economy was 31% and that of private consumption 30%. Annual growth rates, however, fluctuated considerably. The year 1987 was a peak year when private consumption grew by 16%, wholesale trade by 19% and retail trade by 12%, all at constant prices. After 1987 economic growth faltered and stagnation set in.

3. Wholesale trade structure in Iceland

In the 1980-1990 period the number of wholesale outlets increased by 41%, but since 1990 the number has decreased by 6%. This growth was mostly in wholesale trade not elsewhere classified. The volume index for wholesale trade over the same period increased most in export trade and in the trade of motor vehicles.

The legal status of outlets in wholesale trade is presented in Table IS4. Of 1 444 outlets in 1994, just over half were partnerships, over 30% were sole proprietorships and 17% were operated as limited-liability companies. A quite different picture appears for wages and salaries, including estimated owner's income, as a measurement of the relative share of activity. This shows partnerships carrying out over 80% of activity. Sole proprietorships and partnerships together were responsible for 84%. The pattern is similar for the last decade or so.

A geographical breakdown of wholesale outlets shows a clear dominance of Reykjavik, the capital area, where almost 60% of the outlets are in operation. The average density is highest there, showing 81 outlets per 10 000 inhabitants while the average for the rest of the country is 37 outlets.

4. Employment in Icelandic wholesaling

Tax records are used as the data source for employment figures: the number of weeks worked by individuals are converted to full-time equivalent figures. They show that the number of man-years employed in wholesale trade was 6 865 in 1994, a marginal decrease since 1990. The overall increase from 1980 to 1990 was 35% which corresponds to an annual average increase of 3%, although the year-to-year growth rate fluctuated considerably. The growth rate was positive until 1987 and in that year the wholesale trade was employing 7 755 persons, or 51% more than at the beginning of the decade. Individual sectors of the wholesale trade show the same pattern, and the economy as a whole is also characterised by this development, although the fluctuations are smoother. Thus the overall reduction of employment in the economy was 7.5% from 1987 to 1994, compared to 9.5% in wholesale trade.

5. Wholesaling activity and turnover in Iceland

In 1994 the turnover in wholesale trade was 128.8 billion. This figure excludes VAT, which was introduced in 1990. The nominal increase in turnover since 1990 was 18%, which corresponds to 4% average annual growth.

According to VAT tax records, there were 1 957 enterprises operating in the wholesale trade in 1994. Because of different sources this figure is not consistent with the previously-mentioned number of 1 431 enterprises in 1994, which is based on the pay-roll register and different classification procedures. With this reservation in mind, the concentration by turnover category based on VAT records shows that of these 1 957 enterprises there were six enterprises capturing 33% of the total turnover in wholesale, and 24 enterprises having 57% of total turnover.

Another measurement of the concentration in Icelandic industry is obtained by ranking the outlets by declining amount of wages and salaries paid, including the estimated owner's income. Here the source is the pay-roll register and, according to that source, 5% of the outlets in wholesale are paying over 55% of total wages and salaries and 25% of the establishments account for 88% of the wage bill. These figures refer to 1994, but figures for 1990 show a very similar pattern.

6. The structure of cost and profitability in wholesale trade

A part of wholesale statistics is derived from processing of the annual accounts of the enterprises. The National Economic Institute collects a sample of these accounts each year (often covering enterprises responsible for 50% of the total turnover of the trade) to get a picture of the profitability and the general economic situation in individual industries and as a source for national-accounts information. The nominal increase in total revenue in wholesale trade from 1990 to 1994 was 18%. The increase in intermediate consumption, on the other hand, was 75%. The increase in personnel costs, at 32%, is also considerably more than that of total revenues. Consumption of fixed capital in wholesale trade shows a 2% decrease since 1990, which corresponds to the decline in gross fixed capital formation since 1990.

Finally, a short description is given of the profitability of the wholesale trade as derived from annual accounts. Since 1979 tax legislation and accounting practice have introduced complex methods in order to eliminate the distortions caused by inflation to the operating account and the balance sheet. After the correction, both accounts are meant to give a more appropriate picture of profits as well as assets and liabilities. On the other hand, comparisons with other countries can be misleading. For example, balance sheets of enterprises in Iceland present the fixed assets at current prices, not at historic cost like other countries.

With these reservations in mind, results show that in 1994 the net profit from regular operation was 2.5% of the turnover - one of the highest observations since 1984. Only 1990 showed a similar profit. Another measurement of profit is the return on capital. In 1990 the return on capital in wholesale and retail trade was 12-13%, which is also high compared with previous years. In 1995 estimates show a slightly lower return of around 11%. Return on equity was estimated at around 9.5% in 1994.

Two interesting ratios are regularly published from the aggregated balance sheets. One is the current ratio, which shows the ratio between current assets and current liabilities. The other is the equity ratio, showing the equity as a ratio of total liabilities including equity. In 1994 the current ratio for wholesale trade was 1.34 - a little higher than in previous years. The equity ratio shows that equity was 37% in 1994 and had increased from previous years.

Table IS1: Key statistics for wholesale trade, Iceland (1990 - 1994)

	1990	1991	1992	1993	1994
Number of enterprises	1 391	1 461	1 443	1 426	1 431
Number of outlets	1 529	1 493	1 464	1 440	1 444
Total employment (man-years)	6 896	7 224	7 092	6 973	6 865
Employees	6 413	6 775	6 680	6 605	6 517
Self-employed	483	449	412	368	348
Turnover excluding VAT (Mio ISK)	108 717	117 466	112 575	117 128	128 751
Turnover per person employed (1 000 ISK)	15 765	16 261	15 873	16 797	18 755
Personnel costs (Mio ISK)	11 389	14 199	15 223	14 647	15 089
Value added, at factor cost (Mio ISK)	18 063	20 412	21 413	21 661	21 699
Value added per person employed (1 000 ISK)	2 619	2 826	3 019	3 106	3 161
Gross fixed capital formation [1] (Mio ISK)	1 890	1 730	1 760	1 555	1 420
Investment per person employed (1 000 ISK)	274	239	248	223	207

[1] In wholesale and retail trade.
Source: National Economic Institute.

Table IS2: The role of trade in the Icelandic economy (1990 - 1994)

	1990		1993		1994	
	Value	Share (%)	Value	Share (%)	Value	Share (%)
a) Number of enterprises						
Total enterprises [1]	21 349	100.0	25 049	100.0	26 487	100.0
Total distributive trade enterprises	2 910	13.6	3 079	12.3	3 115	11.8
Wholesale trade	1 391	6.5	1 426	5.7	1 431	5.4
Retail trade	1 519	7.1	1 653	6.6	1 684	6.4
b) Employment						
Total resident population	255 708		264 919		266 783	
Total employment (man years)	124 914	100.0	122 055	100.0	122 660	100.0
Persons employed in distributive trades (man years)	14 792	11.8	14 496	11.9	14 300	11.7
Wholesale trade and intermediaries	6 896	5.5	6 973	5.7	6 865	5.6
Retail trade	7 896	6.3	7 523	6.2	7 435	6.1
c) Value added (Mio ISK)						
Gross domestic product, at market prices	363 915		410 860		434 524	
Gross value added of all sectors at factor cost	276 637	100.0	320 460	100.0	:	:
Gross value added of the distributive trade, at factor cost	31 059	11.2	35 566	11.1	37 084	:
d) Household expenditure (Mio ISK)						
Food, drink and tobacco	56 808	25.4	61 667	24.8	60 979	23.7
Clothing, footwear	17 426	7.8	18 098	7.3	19 500	7.6
Rents	33 804	15.1	38 397	15.4	39 893	15.5
Energy (without lubricants)	5 500	2.5	6 879	2.8	7 195	2.8
Furniture, household equipment	17 694	7.9	18 257	7.3	19 926	7.7
Pharmaceuticals, cosmetic goods	4 515	2.0	5 225	2.1	5 495	2.1
Transport and telecommunications	30 876	13.8	34 666	13.9	35 150	13.7
Education, entertainment, leisure	22 931	10.2	26 162	10.5	28 392	11.0
Other goods	34 175	15.3	39 601	15.9	40 931	15.9
Total	**223 729**	**100.0**	**248 952**	**100.0**	**257 461**	**100.0**
e) Tradable consumption (Mio ISK)						
Food, drink and tobacco	56 808	44.9	61 667	45.4	60 979	44.1
Clothing, footwear	17 322	13.7	17 962	13.2	19 377	14.0
Rents	0	0.0	0	0.0	0	0.0
Energy (without lubricants)	209	0.2	271	0.2	281	0.2
Furniture, household equipment	15 296	12.1	15 606	11.5	17 089	12.4
Pharmaceuticals, cosmetic goods	4 515	3.6	5 225	3.8	5 495	4.0
Transport and telecommunications	19 022	15.0	20 604	15.2	20 496	14.8
Education, entertainment, leisure	10 646	8.4	11 697	8.6	12 473	9.0
Other goods	2 828	2.2	2 687	2.0	2 159	1.6
Total	**126 646**	**100.0**	**135 719**	**100.0**	**138 349**	**100.0**

[1] Excluding agricultural businesses, producers of government services and related activities.
Source: National Economic Institute.

Table IS3: Number of wholesale outlets by activity, Iceland (1990 - 1994)

Activity	Number of outlets			Share (%)			Growth (%)	Average annual growth rate (%)
	1990	1993	1994	1990	1993	1994	1994/90	1994/90
Export trade	61	59	66	4.0	4.1	4.6	8.2	2.0
Wholesale distribution of alcohol and tobacco, retailing of alcohol	4	2	2	0.3	0.1	0.1	-50.0	-15.9
Wholesale and retail distribution of gasoline and other petroleum products	51	37	40	3.3	2.6	2.8	-21.6	-5.9
Wholesale and retail distribution of building materials (not for resale)	112	95	99	7.3	6.6	6.9	-11.6	-3.0
Wholesale and retail distribution of motor vehicles and parts and accessories	131	126	121	8.6	8.8	8.4	-7.6	-2.0
Wholesale trade not elsewhere classified	1 170	1 121	1 116	76.5	77.8	77.3	-4.6	-1.2
Total	**1 529**	**1 440**	**1 444**	**100.0**	**100.0**	**100.0**	**-5.6**	**-1.4**

Source: National Economic Institute, Industrial Statistics, 1990-1994.

Table IS4: Number of wholesale outlets by legal status, Iceland (1994)

Activity	Outlets					
	Number	Legal status				
		Sole proprietorship	Partnership	Limited liability company	Cooperative society	Other
Export trade	66	12	44	6	0	4
Wholesale distribution of alcohol and tobacco, retailing of alcohol	2	0	0	0	0	2
Wholesale and retail distribution of gasoline and other petroleum products	40	4	8	23	3	2
Wholesale and retail distribution of building materials (not for resale)	99	9	61	27	1	1
Wholesale and retail distribution of motor vehicles and parts and accessories	121	52	51	17	1	0
Wholesale trade not elsewhere classified	1 116	373	563	170	5	5
Total	**1 444**	**450**	**727**	**243**	**10**	**14**
Share in number of outlets (%)	**100.0**	**31.2**	**50.3**	**16.8**	**0.7**	**1.0**
Share in wages and salaries (including calculated owner's income) %	**100.0**	**2.2**	**81.6**	**7.6**	**2.6**	**6.0**

Source: National Economic Institute, Industrial Statistics 1994.

Table IS5: Geographical distribution of wholesale outlets, Iceland (1990 - 1994)

Tax district	1990			1994		
	Population	Total number of outlets	Number of outlets per 10 000 inhabitants	Population	Total number of outlets	Number of outlets per 10 000 inhabitants
Reykjavík	97 569	953	98	103 020	833	81
Reykjanes	63 613	363	57	69 149	400	58
Western Iceland	14 537	28	19	14 292	27	19
West Fjords	9 798	24	24	9 453	22	23
North-western	10 446	14	13	10 293	14	14
North-east	26 127	71	27	26 785	67	25
East	13 216	33	25	12 911	31	24
South	20 402	43	21	20 880	50	24
Total	**255 708**	**1 529**	**60**	**266 783**	**1 444**	**54**

Source: National Economic Institute and the Statistical Bureau of Iceland, Statistical Abstract of Iceland 1990, 1994.

Table IS6: Employment by activity, Iceland (1990 - 1994)

Activity	Persons employed (man years)			Share (%)			Growth (%)	Average annual growth rate (%)
	1990	1993	1994	1990	1993	1994	1994/90	1994/90
Export trade	400	423	415	5.8	6.1	6.0	3.8	0.9
Wholesale distribution of alcohol and tobacco, retailing of alcohol	168	174	176	2.4	2.5	2.6	4.8	1.2
Wholesale and retail distribution of gasoline and other petroleum products	955	1 076	1 091	13.8	15.4	15.9	14.3	3.4
Wholesale and retail distribution of building materials (not for resale)	770	788	759	11.2	11.3	11.1	-1.4	-0.4
Wholesale and retail distribution of motor vehicles and parts and accessories	688	660	586	10.0	9.5	8.5	-14.8	-3.9
Wholesale trade not elsewhere classified	3 915	3 851	3 837	56.8	55.2	55.9	-2.0	-0.5
Total	**6 896**	**6 973**	**6 865**	**100.0**	**100.0**	**100.0**	**-0.5**	**-0.1**

Source: National Economic Institute, Industrial Statistics 1990-1994.

Table IS7: Wholesale turnover by activity, Iceland (1990 - 1994)

Activity	Turnover (Mio ISK)			Share (%)			Growth (%)	Average annual growth rate(%)
	1990	1993	1994	1990	1993	1994	1994/90	1994/90
Export trade	1 659	3 784	9 196	1.5	3.2	7.1	454.2	53.4
Wholesale distribution of alcohol and tobacco, retailing of alcohol	9 058	9 660	9 934	8.3	8.2	7.7	9.7	2.3
Wholesale and retail distribution of gasoline and other petroleum products	18 875	21 953	21 583	17.4	18.7	16.8	14.3	3.4
Wholesale and retail distribution of building materials (not for resale)	10 636	10 899	11 618	9.8	9.3	9.0	9.2	2.2
Wholesale and retail distribution of motor vehicles and parts and accessories	12 649	14 607	14 497	11.6	12.5	11.3	14.6	3.5
Wholesale trade not elsewhere classified	55 840	56 225	61 923	51.4	48.0	48.1	10.9	2.6
Total	**108 717**	**117 128**	**128 751**	**100.0**	**100.0**	**100.0**	**18.4**	**4.3**
Index of turnover at constant prices	**100.0**	**91.8**	**91.8**				**-8.2**	**-2.1**

Source: National Economic Institute, Industrial Statistics, 1990-94.

Table IS8: Concentration by turnover category in Icelandic wholesale trade (1994)

Activity	Total turnover	Turnover category (Mio ISK)						
		0-9	10-49	50-99	100-499	500-999	1 000-4 999	≥ 5 000
Export trade	26 805	150	575	373	2 292	0	1 577	21 837
Wholesale distribution of alcohol and tobacco, retailing of alcohol	10 005	8	0	60	0	0	0	9 937
Wholesale and retail distribution of gasoline and other petroleum products	22 293	34	334	481	992	0	0	20 452
Wholesale and retail distribution of building materials (not for resale)	9 806	204	1 086	781	2 449	0	5 286	0
Wholesale and retail distribution of motor vehicles and parts and accessories	14 540	247	618	0	2 181	2 248	9 246	0
Wholesale trade not elsewhere classified	72 455	2 194	8 348	7 775	23 361	9 790	20 986	0
Total	**155 904**	**2 837**	**10 961**	**9 469**	**31 276**	**12 038**	**37 096**	**52 226**
Cumulative turnover in %		**1.8**	**8.9**	**14.9**	**35.0**	**42.7**	**66.5**	**100.0**
Number of enterprises	**1 957**	**1 172**	**461**	**134**	**148**	**18**	**18**	**6**
Cumulative % of number of enterprises		**59.9**	**83.4**	**90.3**	**97.9**	**98.8**	**99.7**	**100.0**

Source: National Economic Institute, VAT tax records.

Table IS9: Concentration in Icelandic wholesale trade (1990 - 1994)

Year	Number of outlets	Wages and salaries [1] (Mio ISK)	Wages and salaries of the largest 5%, 10% and 25% of enterprises					
			5%	10%	25%	5%	10%	25%
			Value (Mio ISK)			Share (%)		
1990	1 529	9 799	5 585	6 869	8 446	57.0	70.1	86.2
1991	1 493	11 837	6 475	8 452	10 322	54.7	71.4	87.2
1992	1 464	12 253	6 849	8 773	10 709	55.9	71.6	87.4
1993	1 440	12 197	6 672	8 636	10 624	54.7	70.8	87.1
1994	1 444	12 313	6 834	8 828	10 811	55.5	71.7	87.8

[1] Including calculated owner's income.
Source: National Economic Institute, Industrial Statistics, 1990-94.

Table IS10: Revenue and structure of costs in wholesale trade enterprises, Iceland (1990 - 1994)

	Value (Mio ISK)			Share (%)			Growth (%)	Average annual growth rate (%)
	1990	1993	1994	1990	1993	1994	1994/90	1994/90
Total revenue	108 717	117 128	128 751	100.0	100.0	100.0	18.4	4.3
Intermediate consumption	9 985	12 319	17 501	9.2	10.5	13.6	75.3	15.1
Value added, at market prices	19 841	22 063	22 930	18.2	18.8	17.8	15.6	3.7
Personnel costs	11 389	14 647	15 089	10.5	12.5	11.7	32.5	7.3
Consumption of fixed capital	2 031	2 452	1 999	1.9	2.1	1.6	-1.6	-0.4
Operating surplus	4 668	4 762	5 228	4.3	4.1	4.1	12.0	2.9

Source: National Economic Institute, Industrial Statistics 1990-1994.

NORWAY

1. Introduction and key statistics

Norway, with a population of 4.3 million, is classed as a small country. It continues to remain outside the European Union (EU) but since 1960 has been a member of the European Free Trade Association (EFTA). The free trade agreement of October 1991 between EU and EFTA countries brought new opportunities for wholesale enterprises in both regions. In 1992 Norway and the EU signed the "EEA Agreement", which considerably strengthened the ties between the two.

Until 1994 Norway used an industrial classification consistent with ISIC Rev. 2, but during 1994 and 1995 it implemented a classification based on NACE Rev.1. The data in this chapter are based on the earlier classification and recognise three major groupings of activity within wholesaling:

- Wholesaling of consumer goods - food, beverages and tobacco; textiles, clothing and footwear; furniture and furnishings; other consumer goods.
- Wholesaling of producer goods - raw materials; hardware and construction materials; machinery and equipment.
- Wholesaling of motor vehicles, fuel and gasoline.

It is preferable to exclude ancillary units, which do not perform any direct trading activity, from the numbers of wholesale establishments. Ancillary units should, however, be included in the employment figures, since the man-years worked in them represent work performed within the wholesaling sector. In general, therefore, the figures for establishments in this chapter exclude ancillary units and the employment figures include them.

Employment is measured by the number of man-years completed. Since there are many part-time workers in wholesaling, the total number of man-years is less than the total number of persons employed in the sector. For example, in 1990 an average of 120 000 people were employed in wholesaling and commission trade, but these accounted for only around 107 000 man-years.

From 1985 to 1991 the number of enterprises with a main emphasis on wholesaling increased by 34%. In the same period, the number of wholesaling establishments increased by 33%. Overall, therefore, the ratio between the number of establishments and the number of enterprises has remained stable. The employment figures for establishments (measured in man-years) increased by 4% in the period, whilst turnover increased by 33% (in current prices). The turnover per man-year increased by 28%. At the same time, however, wholesale prices increased by 45% and wholesale turnover in constant prices fell by 8%, which may indicate a decline in the productivity of the industry over the six-year period.

2. The role of the distributive trades in the Norwegian economy

In March 1991 the Central Register of Establishments and Enterprises at Statistics Norway held a total of 187 600 establishments. The figures for 1989 and 1985 were 207 700 and 181 100 respectively. There were 18 800 wholesale establishments registered in 1991, and 19 400 and 16 500 in 1989 and 1985.

In 1991, wholesaling accounted for 10% of all establishments - a growth of one percentage point from 1985. For wholesaling of consumer goods, the share of the total number of establishments (3.4% in 1991) has remained stable since 1985. The share for wholesaling of producer goods was 6.2% in 1991, representing a growth of around one percentage point from 1985. The total share of vehicle, fuel and gasoline wholesaling has remained stable at 0.4% since 1985.

The distributive trades were responsible for 14.0% of the total number of man-years worked in 1991. This represented an increase of 0.4 percentage points from 1985, despite stability in the percentage shares for both retailing and commission trading, and was due to an increase of more than 4 000 man-years within wholesaling coupled with a drop of 92 000 man-years in total employment. 6.4% of employed persons were in wholesaling in 1991, as against 5.9% in 1985, and a further 0.2% were employed in commission trade.

Gross national product in Norway in 1991 was NOK 686.7 billion. GNP for the distributive trades was estimated at NOK 66.7 billion, or 9.7% of total GNP. This represents a minor increase in share of about 0.1 percentage points from 1985.

3. The structure of the wholesale trade in Norway 1985-91

3.1. Wholesale enterprises

For wholesaling overall, the average annual growth in the number of enterprises for the period 1985 to 1991 was 5%. Wholesale of machinery and equipment showed the highest growth in the sub-categories in the period, at 8% a year. The lowest growth, a little over 1%, was in motor vehicles. At the major sector-of-activity level the highest average annual growth, 6%, was for wholesale of producer goods.

The largest major sector of wholesaling activity is the producer goods category, which represented 62% of all wholesaling enterprises in 1991 against 58% in 1985. Enterprises whose main activity is the wholesale of consumer goods represented 35% of the total in 1991, three percentage points less than in 1985. The share of the major group motor vehicles, fuel and gasoline was 3.6% in 1991, 0.6 percentage points less than in 1985.

The number of consumer goods enterprises increased by 22% from 1985 to 1991. The wholesale of food, beverages and tobacco is the largest specialised form of activity, accounting for 9% of all wholesaling enterprises in 1991 although it had grown at a slower rate than other sub-categories of consumer goods.

The number of enterprises in the producer goods sector of activity grew by 43% over the period. The sector includes the two largest categories of activity in terms of numbers of enterprises: machinery and equipment, and hardware and construction materials, which represented 37% and 17% respectively of all wholesaling enterprises in 1991. These categories also registered the highest percentage growths and increased their number of enterprises by 59% and 29% between 1985 and 1991.

The other major sector of activity - motor vehicles, fuel and gasoline - was fairly stable overall during the same six-year period. However, while the number of motor vehicle enterprises increased by 9%, fuel and gasoline wholesaling enterprises increased by 30%.

3.2. Wholesale establishments

In 1991 there were around 19 000 wholesale establishments in Norway (excluding ancillary units). The total number of wholesale establishments increased by 33% from 1985 to 1991, equivalent to a 4.9% annual average growth for this period. The number of producer-goods establishments increased by 42%, while consumer-goods establishments recorded 21% growth in the same period.

62% of all wholesale establishments were dealing in producer goods in 1991 (nearly four percentage points more than in 1985). 34% were consumer-goods establishments and nearly 4% were in the major sector of motor vehicles, fuel and gasoline.

Most Norwegian wholesale enterprises have only one establishment. In 1991 there were on average only 1.07 establishments per enterprise, and nearly 85% were single-unit enterprises. This position had changed little since 1985, although rationalisation had led to a slight increase in the number of establishments per enterprise in the motor trades sector.

Moreover, wholesale establishments in Norway are usually quite small. In 1991, 60% had fewer than three persons employed and 87% had fewer than ten. 36% of wholesale establishments in the producer-goods category had fewer than three employees.

However, large establishments dominate in Norway in terms of the number of man-years worked and turnover. Establishments with ten or more employees account for 66% of all man-years worked in the wholesale trade and for 70% of wholesale turnover. In 1991, large establishments with 30 or more persons employed accounted for almost 39% of all man-years worked and for 43% of turnover.

Also in 1991, nearly two-thirds of wholesale establishments had a turnover of under NOK 5 million, three-quarters under NOK 10 million and almost a quarter under NOK 0.5 million. Nevertheless, establishments with a turnover of NOK 50 million or more accounted for 43% of employment and for 68% of turnover. The corresponding shares for establishments with NOK 20 million or more of turnover were 63% and 82% respectively.

4. Employment in Norwegian wholesaling

Norwegian wholesaling was responsible for almost 107 000 man-years in full-time equivalents in 1991 (including 2 800 man-years in ancillary units).

Wholesaling employment measured in man-years has been variable since 1985, growing to a peak in 1988 before falling back somewhat until 1990. The net change from 1985 to 1991 was an increase of almost 4%.

Employment shares for individual major sectors of activity have been fairly stable, with producer goods taking a share of around 60%, consumer goods 33% and the motor trades almost 7% in 1991. The machinery and equipment sub-category of activity has been the most dynamic in terms of employment, with an increase of over 12% from 1985 to 1991. Employment in the wholesale of motor vehicles sub-category fell by almost 11%, however.

The breakdown between full-time and part-time employment comes from a labour market survey which counts persons employed rather than man-years, and does not distinguish between wholesale and commission trade (although the inclusion of commission trade has little effect on the picture).

In 1991, part-time employment accounted for 13% of total employment in the wholesale and commission trade division. The most commonly-agreed working hours were 37-39 hours per week throughout 1988, 1990 and 1991. (This is reasonable, as the normal working week in Norway is 37.5 hours). 60% of persons employed worked within this band in 1990 and 1991.

Males accounted for 70% of wholesale employment. In more detail, men aged 30-49 were the largest group (by combination of sex and age), accounting for 40% of all persons employed in the division for the three years. If women are included in this age group, the proportion increases to 50%.

Retirement age in Norway is currently 66 years. Employed persons above pensionable age account for an insignificant share of total employment at around 1%.

5. Wholesaling activity in Norway

Total wholesaling turnover grew by 33% in current prices to a total of NOK 348 billion from 1985 to 1991.

Wholesale trade in consumer goods saw the highest growth (55%) of all major sectors of activity during the period, and turnover of producer goods grew by 33%. The turnover of trade in motor vehicles, fuel and gasoline dropped by over 3% as a result of a considerable decline in the number of vehicles sold.

At the activity sub-category level, trade in food, beverages and tobacco had the highest growth (58%) after trade in miscellaneous other consumer goods. The food sub-category also had the highest percentage share of total turnover in 1991 (25%, or four percentage points more than in 1985). Trade in motor vehicles declined by 23%, which was the largest fall over the period.

In constant prices there was a drop of 8% in wholesale turnover from 1985 to 1991, with only the consumer-goods category showing growth.

6. Ownership structure of Norwegian wholesaling

Most Norwegian wholesaling enterprises are limited companies. In 1991, 69% of all Norwegian wholesale establishments belonged to this category of ownership - an increase from 57% in 1975 and 61% in 1985. Limited companies accounted for 87% of all man-years in Norwegian wholesaling in 1991 (78% and 83% in 1975 and 1985 respectively).

Also in 1991, limited companies had a share of 81% of the total turnover within wholesaling - an increase from 71% and 79% in 1975 and 1985 respectively. Limited-liability ownership has thus come to dominate the ownership structure within Norwegian wholesaling.

In 1991, 23% of all wholesale establishments were sole proprietorships. Their share of the employment market was inevitably much smaller, at less than 4%, and their share of total wholesale turnover was more modest still, at 1.7%.

Cooperatives accounted for 3.1% of all wholesale establishments in 1991 and took an employment share of 5.8%. The share of cooperatives in total wholesaling turnover was considerably greater, at 13%, because cooperatives have large units and register the highest turnover per person employed. The role of cooperatives has been dwindling since the second world war: in 1956 and 1975 their share of turnover was 18% and 14% respectively.

7. The regional distribution of wholesale establishments in Norway

Norway has a total of 19 counties. Oslo is the largest in demographic terms, with 462 000 inhabitants at the beginning of 1991. Next come Akershus and Hordaland, with 418 000 and 411 000 respectively. This picture is reflected in the figures for wholesale establishments: at the start of 1991 Oslo had the largest number of wholesaling establishments of all Norwegian counties at 4 160, or 22%; Akershus and

Hordaland had 2 671 (14%) and 1 464 (8%) respectively.

The same county ranking applies to employment in wholesaling, with Oslo accounting for 32% of man-years worked. In turnover terms Oslo is even more dominant: in 1991 the county had a wholesale turnover of almost NOK 125 billion - 36% of the total for Norway. Akershus came second with NOK 45 billion (15.5%) and Rogaland third with NOK 28 billion (8%). Overall, the counties in Eastern Norway, Oslo and Akershus accounted for just over half the total turnover in the sector.

The Oslo and Akershus share of wholesale establishments has been relatively stable over the last 25 years, but Oslo has declined in importance at the expense of Akershus and other neighbouring counties, particularly Buskerud. Oslo dominates wholesaling per head of population: in 1991 the county had per-capita sales of NOK 268 000, followed by Akershus at just over NOK 128 000 and Rogaland at NOK 82 000. Nord-Trøndelag had the lowest per-capita sales of any county, at NOK 18 800. The wholesale trade in Norway can therefore be said to be highly concentrated geographically.

8. Financial statement analysis, cost structure and productivity

The accounts statistics for wholesale enterprises produced by Statistics Norway cover only those with 30 or more man-years worked. Enterprises that have been operating for only part of the accounting year are as a rule excluded from the statistics. Enterprises having failed to submit adequate accounts are also excluded. Enterprises included in the accounts statistics for 1991 thus account for less than half of total employment in the wholesale trade for that year.

8.1. Cost structure

The operating profit in 1991 of all wholesale trade enterprises covered was 1.2% of the operating income. Goods consumption accounted for 76.5% of operating income, while salary costs accounted for 9.4%. Other operating costs totalled 11.5% and ordinary depreciation 1.4% of operating income. These percentages have remained fairly stable during the last few years. Consumer-goods enterprises have a relatively high consumption of goods (83% of operating income in 1991) and relatively low salary costs (6% of operating income in 1991). The opposite applies to producer-goods firms: here goods consumption and salary costs were 69% and 14% respectively of operating income in 1991.

8.2. Value added and productivity

Employment within wholesaling (measured in man-years) increased by 4% from 1985 to 1991, while turnover at current prices increased by 33%. Turnover per man-year thus increased by 28%. At the same time, however, wholesale prices rose by 45% and so there was a decline in turnover per man-year measured in constant prices. The possible explanations for this fall-off include lower trade productivity due, for example, to reduced productivity of labour or assets, and changes in external conditions (such as changes in demand and increases in interest rates).

For the wholesale enterprises in the accounts statistics sample, value added dropped by 1.3% from 1988 to 1991. Value added divided by personnel costs gives a measure of labour productivity. For the enterprises in the sample this dropped by 5% from 1988, to 1.31 in 1991.

The same source indicates, however, that the turnover rate for total operating assets (that is, the ratio of turnover to assets employed) increased from 1989 to 1991. This means that the productivity of capital has improved for the larger enterprises covered during the period. If these are representative of wholesaling as a whole, the decline in constant price turnover per man-year is probably due not to lower asset productivity, but to reduced labour productivity or other internal or external causes.

8.3. Investment by wholesale enterprises

The accounts statistics show that the investment in fixed assets for wholesale enterprises with more than 30 man-years was NOK 1 962 million in 1985, NOK 2 818 million in 1988, NOK 1 069 million in 1990 and 3 238 million in 1991.

9. Grocery trade: present and future changes

The grocery trade is responsible for the sale of food, beverages and tobacco. This is the area of activity with the highest turnover in wholesaling in the past few years. In 1991 it was responsible for around a quarter of total wholesaling turnover.

According to 'Andøy report', the wholesalers' grocery supply share increased from 31% to 41% between 1988 and 1993, with the strongest growth occurring after 1991. The reason for this upturn for wholesalers within the grocery trade is that a number of direct distributors have transferred to wholesale distribution. This applies, for example, to trend-setting food producers such as Forma, Frionor and Norske Meierier for staple products, the chocolate manufacturer Nidar-Bergene and several private meat producers. The transfer to wholesale distribution can be explained in part by a desire on the part of retailing customers to have joint distribution via the wholesale trade's distribution depots, and by cost-cutting and competition amongst grocery wholesalers.

Much of the reason for the effectiveness of grocery wholesalers is the formation of retail chains. These chains ensure that there is pressure on both manufacturers and wholesalers to make their production and delivery more effective. Today there are four large retail chains in the market, plus a number of smaller actors on the sales side. There is currently a higher market concentration than was the case a few years ago. The chain system has made it easier to establish grocery shops and the competition has moved from retail level to chain level. This has left fewer participants in the market and increased competition, something that has meant an increased requirement for efficiency at retail level.

At the same time the retail level has gradually become more integrated with the wholesalers. This in turn has boosted the requirement for efficiency at wholesale level, resulting in improved cost-effectiveness for grocery wholesalers over the last few years.

A further concentration at retail chain level might have a negative effect from a macro-economic point of view. It could reduce the number of participants in the market, which would encourage the use of market forces and ineffective micro-economic solutions and diminish the incentive to be efficient in the remaining chains, because there would be less danger of losing shares in the market.

Table NO1: Long term trends of main indicators in wholesale trade, Norway (1982 - 1991)

	1982	1985	1989	1990	1991	Growth (%) 1991/82	Average annual growth rate (%) 1991/82
Number of establishments (1 000) [1]	11.9	14.3	16.9	17.9	19.1	61	5.4
Persons employed (1 000) [2]	97	103	107	106	107	10	1.1
Turnover excluding VAT (bn NOK)	183.0	261.1	328.0	343.6	348.2	90	7.4

[1] Ancillary units are excluded.
[2] Man-years worked (including ancillary units).
Source: Statistics Norway.

Table NO2: Evolution of main indicators in wholesale trade, Norway (1985 - 1991)

	1985	1988	1990	1991	Growth (%) 1991/85	Average annual growth rate (%) 1991/85
Number of enterprises	13 262	15 484	16 627	17 767	34	5.0
Number of establishments [1]	14 345	16 725	17 931	19 072	33	4.9
Persons employed (1 000) [2]	103	112	106	107	3	0.6
Turnover excluding VAT (bn NOK)	261.1	318.0	343.6	348.1	33	4.9
Turnover per man-years worked (Mio NOK)	2.54	2.85	3.25	3.25	28	4.2

[1] Ancillary units are excluded.
[2] Man-years worked (including ancillary units).
Source: Statistics Norway.

Table NO3: The role of distributive trade in the Norwegian economy (1991)

	Value	Share (%)
a) Number of establishments [1]		
Total establishments	187 588	100.0
Wholesale establishments	18 789	10.0
Consumer goods	6 368	3.4
Producer goods	11 624	6.2
Motor vehicles gasoline & fuel	797	0.4
b) Employment [2] (1 000)		
Mean population aged 16-74 years	3 105	
Total employment		
individuals	2 010	
in man-years worked [3]	1 666	100.0
Distributive trade (in man-years)	233.8	14.0
Wholesaling	107	6.4
Retailing	123.4	7.4
Commission trade	3.4	0.2
c) GNP (Mio NOK) [4]		
GNP total	686 686	100.0
GNP for distributive trade	66 663	9.7

[1] Number of active establishments in the CRE of Statistics Norway.
[2] Annual average.
[3] *Source*: NOS B 965: Labour Market Statistics 1990.
[4] *Source*: NOS: National Accounts Statistics.
Source: Statistics Norway.

Table NO4: Number of wholesale enterprises by activity, Norway (1985 - 1991)

Activity	Enterprises						Growth (%)	Average annual growth rate (%)
	Number			Share (%)				
	1985	1990	1991	1985	1990	1991	1991/85	1991/85
Consumer goods total	5 057	5 756	6 190	38.2	34.6	34.9	22.4	3.4
Food, beverages and tobacco	1 444	1 597	1 663	10.9	9.6	9.4	15.2	2.4
Textiles, clothings and footwear	913	1 105	1 169	6.9	6.6	6.6	28.0	4.2
Furnitures and furnishings	661	742	793	5.0	4.5	4.5	20.0	3.1
Other consumer goods	2 039	2 312	2 565	15.4	13.9	14.4	25.8	3.9
Producer goods	7 642	10 253	10 937	57.6	61.7	61.5	43.1	6.2
Raw materials	1 233	1 401	1 445	9.3	8.4	8.1	17.2	2.7
Hardware and construction materials	2 308	2 836	2 986	17.4	17.1	16.8	29.4	4.4
Machinery and equipment	4 101	6 016	6 506	30.9	36.2	36.6	58.6	8.0
Motor vehicles, gasoline and fuel	563	618	640	4.2	3.7	3.6	13.7	2.2
Motor vehicles	428	441	465	3.2	2.6	2.6	8.6	1.4
Gasoline and fuel	135	177	175	1.0	1.1	1.0	29.6	4.4
Total	**13 262**	**16 627**	**17 767**	**100.0**	**100.0**	**100.0**	**34.0**	**5.0**

Source: Statistics Norway.

Table NO5: Number of wholesale establishments by activity, Norway (1985 - 1991)

Activity	Establishments						Growth (%)	Average annual growth rate (%)
	Number			Share (%)				
	1985	1990	1991	1985	1990	1991	1991/85	1991/85
Consumer goods total	5 338	6 046	6 472	37.2	33.7	33.9	21.2	3.3
Food, beverages and tobacco	1 648	1 808	1 875	11.5	10.1	9.8	13.8	2.2
Textiles, clothings and footwear	919	1 109	1 169	6.4	6.2	6.1	27.2	4.1
Furnitures and furnishings	690	772	820	4.8	4.3	4.3	18.8	2.9
Other consumer goods	2 081	2 357	2 608	14.5	13.1	13.7	25.3	3.8
Producer goods	8 415	11 213	11 913	58.7	62.6	62.5	41.6	6.0
Raw materials	1 398	1 608	1 640	9.8	9.0	8.6	17.3	2.7
Hardware and construction materials	2 513	3 083	3 226	17.5	17.2	16.9	28.4	4.3
Machinery and equipment	4 504	6 522	7 047	31.4	36.4	37.0	56.5	7.8
Motor vehicles, gasoline and fuel	592	672	687	4.1	3.7	3.6	16.1	2.5
Motor vehicles	445	472	492	3.1	2.6	2.6	10.6	1.7
Gasoline and fuel	147	200	195	1.0	1.1	1.0	32.7	4.8
Total	**14 345**	**17 931**	**19 072**	**100.0**	**100.0**	**100.0**	**33.0**	**4.9**

Source: Statistics Norway.

Table NO6: Number of establishments, employment and turnover by employment size-class, Norway (1991)

Employment size-class	Wholesale establishments [1]	Persons employed [1]	Turnover excluding VAT
	Number	Number (in man-years)	Value (Mio NOK)
≤ 2	11 369	9 799	29 316
3 - 4	2 756	9 221	24 319
5 - 9	2 518	16 382	51 834
10 - 19	1 380	18 175	55 308
20 - 29	462	10 893	36 027
≥ 30	587	39 787	151 344
Total	**19 072**	**104 257**	**348 147**

[1] Excluding ancillary units.
Source: Statistics Norway.

Table NO7: Number of establishments by employment size-class, Norway (1991)

Activity	Establishments							
	Number	Share (%)	Employment size-class					
			≤ 2	3-4	5-9	10-19	20-29	≥ 30
Consumer goods total	6 472	34.0	4 174	799	719	404	172	204
Food, beverages and tobacco	1 875	10.0	964	252	276	180	87	116
Textiles, clothings and footwear	1 169	6.0	826	150	118	47	15	13
Furniture and furnishings	820	4.0	513	102	99	49	28	29
Other consumer goods	2 608	14.0	1 871	295	226	128	42	46
Producer goods	11 913	62.0	6 821	1 857	1 707	923	269	336
Raw materials	1 640	9.0	973	202	221	137	38	69
Hardware and construction materials	3 226	17.0	1 769	570	484	251	73	79
Machinery and equipment	7 047	37.0	4 079	1 085	1 002	535	158	188
Motor vehicles, gasoline and fuel	687	4.0	374	100	92	53	21	47
Motor vehicles	492	3.0	245	69	75	46	19	38
Gasoline and fuel	195	1.0	129	31	17	7	2	9
Total	**19 072**	**100.0**	**11 369**	**2 756**	**2 518**	**1 380**	**462**	**587**

Source: Statistics Norway.

Table NO8: Employment by activity in Norwegian wholesaling (1985 - 1991)

Activity	Employment (man-years worked)						Growth (%)	Annual average growth rate (%)
	Number (1 000)			Share (%)				
	1985	1990	1991	1985	1990	1991	1991/85	1991/85
Consumer goods	33.0	33.9	35.3	32.0	32.0	33.0	7.0	1.1
Food, beverages and tobacco	16.1	15.9	16.8	15.6	15.0	15.7	4.4	0.7
Textiles, clothings and footwear	3.8	3.5	3.6	3.6	3.3	3.4	-5.3	-0.9
Furniture and furnishings	4.9	4.4	4.6	4.8	4.1	4.3	-6.1	-1.0
Other consumer goods	8.2	10.1	10.3	8.0	9.6	9.6	25.6	3.9
Producer goods	62.1	64.9	64.5	60.3	61.4	60.3	3.9	0.6
Raw materials	10.3	10.6	10.2	10.0	10.0	9.5	-1.0	-0.2
Hardware and construction materials	17.9	16.7	16.2	17.4	15.8	15.2	-9.5	-1.6
Machinery and equipment	33.9	37.6	38.1	32.9	35.6	35.6	12.4	2.0
Motor vehicles, gasoline and fuel	7.9	7.0	7.2	7.7	6.6	6.7	-8.9	-1.5
Motor vehicles	4.6	3.8	4.1	4.5	3.6	3.8	-10.9	-1.9
Gasoline and fuel	3.3	3.2	3.1	3.2	3.0	2.9	-6.1	-1.0
Total	**103.0**	**105.8**	**107.0**	**100.0**	**100.0**	**100.0**	**3.9**	**0.6**

Source: Statistics Norway.

Table NO9: Persons employed in wholesale and commission trade by agreed/normal working hours per week (1988 - 1991)

Agreed/normal working hours per week [1]	Persons employed (1 000)		
	1988	1990	1991
Total	126	120	124
Part-time	20	15	16
1-9 hours	4	2	2
10-19 hours	3	4	3
20-29 hours	5	5	7
30-36 hours	7	3	4
Full-time	94	105	107
30-36 hours	0	2	2
37-39 hours	39	72	74
40-44 hours	23	14	14
45 timer and more hours	32	17	16
Undeclared	13	0	0

[1] The data for 1988 are based on actual work hours; data for 1990 and 1991 are based on agreed hours.
Source: Statistics Norway.

Table NO10: Persons employed in wholesale and commission trade by sex and age, Norway (1988 - 1991)

Sex and age groups:	Persons employed (1 000)		
	1988	1990	1991
Men:			
Total	90	87	86
16-19 years	3	2	2
20-24 years	8	6	6
25-29 years	12	13	11
30-39 years	26	25	25
40-49 years	24	23	24
50-59 years	12	11	11
60-66 years	4	5	5
67-69 years	1	1	1
Women:			
Total	36	34	37
16-19 years	2	1	1
20-24 years	5	4	4
25-29 years	5	5	6
30-39 years	9	9	10
40-49 years	9	9	10
50-59 years	5	4	4
60-66 years	1	1	2
67-69 years	0	0	0

Source: Statistics Norway.

Table NO11: Wholesale trade turnover in current prices by activity, Norway (1985 - 1991)

Activity	Turnover (excluding VAT)						Growth (%)	Average annual growth rate (%)
	Value (bn NOK)			Share (%)				
	1985	1990	1991	1985	1990	1991	1991/85	1991/85
Consumer goods	87.0	131.9	135.1	33.3	38.4	38.8	55.2	7.6
Food, beverages and tobacco	53.9	85.9	85.7	20.6	25.0	24.6	58.9	8.0
Textiles, clothings and footwear	8.9	10.5	11.3	3.4	3.1	3.2	27.1	4.1
Furniture and furnishings	11.2	13.4	13.8	4.3	3.9	4.0	22.9	3.5
Other consumer goods	13.0	22.1	24.3	5.0	6.4	7.0	87.0	11.0
Producer goods	123.4	164.5	164.1	47.3	47.9	47.1	33.0	4.9
Raw materials	42.2	56.0	55.2	16.2	16.3	15.8	30.6	4.6
Hardware and construction materials	30.6	38.0	36.3	11.7	11.1	10.4	18.6	2.9
Machinery and equipment	50.6	70.5	72.6	19.4	20.5	20.9	43.6	6.2
Motor vehicles, gasoline and fuel	50.7	47.2	49.0	19.4	13.7	14.1	-3.4	-0.6
Motor vehicles	23.5	18.0	18.0	9.0	5.2	5.2	-23.5	-4.3
Gasoline and fuel	27.2	29.2	31.0	10.4	8.5	8.9	14.0	2.2
Total	**261.1**	**343.6**	**348.1**	**100.0**	**100.0**	**100.0**	**33.3**	**4.9**

Source: Statistics Norway.

Table NO12: Wholesale trade turnover in constant 1985 prices by activity, Norway (1985 - 1991)

Activity	Turnover excluding VAT (bn NOK)			Growth (%)	Average annual growth rate (%)
	1985	1990	1991	1991/85	1991/85
Consumer goods total	87.0	95.7	94.0	8.0	1.3
Food, beverages and tobacco	53.9	62.3	59.6	10.6	1.7
Textiles, clothings and footwear	8.9	7.6	7.9	-11.4	-2.0
Furniture and furnishings	11.2	9.7	9.6	-14.3	-2.5
Other consumer goods	13.0	16.0	16.9	30.0	4.5
Producer goods	123.4	118.4	114.4	-7.3	-1.3
Raw materials	42.2	40.3	38.5	-8.8	-1.5
Hardware and construction materials	30.6	27.4	25.3	-17.3	-3.1
Machinery and equipment	50.6	50.8	50.6	0.0	0.0
Motor vehicles, gasoline and fuel	50.7	36.7	33.9	-33.1	-6.5
Motor vehicles	23.5	14.0	12.5	-46.8	-10.0
Gasoline and fuel	27.2	22.7	21.5	-21.0	-3.8
Total	**261.1**	**252.7**	**240.6**	**7.9**	**-1.4**

Source: Statistics Norway.

Table NO13: Establishments, employment and turnover by ownership category, Norway (1991)

	Total	Legal status							
		Sole proprietorship		Limited companies		Cooperatives		Other	
	Value	Number	Share (%)	Number	Share (%)	Number	Share (%)	Number	Share (%)
Number of establishments	19 072	4 404	23.1	13 099	68.7	597	3.1	972	5.1
Persons employed [1]	104 257	4 017	3.9	91 171	87.4	6 018	5.8	3 051	2.9
Turnover excluding VAT (Mio NOK)	348 147	5 846	1.7	281 469	80.8	45 528	13.1	15 304	4.4

[1] In man-years worked, excluding ancillary units.
Source: Statistics Norway.

Table NO14: Wholesale establishments, employment and turnover by county, Norway (1991)

County	Establishments		Persons employed (in man-years)		Turnover excluding VAT (Mio NOK)	
	Number	Share (%)	Number	Share (%)	Value	Share (%)
Østfold	1 154	6.1	4 390	4.1	12 637	3.6
Akershus	2 671	14.0	17 146	16.0	54 002	15.5
Oslo	4 160	21.8	34 022	31.8	124 519	35.8
Hedmark	608	3.2	2 590	2.4	7 113	2.0
Oppland	460	2.4	1 884	1.8	4 482	1.3
Buskerud	1 105	5.8	5 222	4.9	14 970	4.3
Vestfold	1 068	5.6	4 509	4.2	11 231	3.2
Telemark	544	2.9	2 343	2.2	5 596	1.6
Aust-Agder	240	1.3	861	0.8	2 307	0.7
Vest-Agder	582	3.0	2 323	2.2	5 487	1.6
Rogaland	1 322	6.9	7 128	6.7	27 933	8.0
Hordaland	1 464	7.7	7 842	7.3	22 122	6.4
Sogn og Fjordane	320	1.7	1 169	1.1	3 643	1.0
Møre og Romsdal	893	4.7	3 577	3.3	13 779	4.0
Sør- Trøndelag	898	4.7	5 322	5.0	19 285	5.5
Nord-Trøndelag	276	1.4	1 000	0.9	2 392	0.7
Nordland	669	3.5	2 587	2.4	6 966	2.0
Troms	458	2.4	2 364	2.2	7 640	2.2
Finnmark	180	0.9	734	0.7	2 043	0.6
Total	**19 072**	**100.0**	**107 013**	**100.0**	**348 147**	**100.0**

Source: Statistics Norway.

Table NO15: Wholesale turnover per capita by county, Norway (1991)

County	Turnover excluding VAT (Mio NOK)	Population [1] (1 000)	Turnover per capita (1 000 NOK)
Oslo	124.5	464.4	268.2
Akershus	54.0	419.8	128.6
Rogaland	27.9	339.9	82.2
Sør-Trøndelag	19.3	252.0	76.5
Buskerud	15.0	226.0	66.4
Møre og Romsdal	13.8	238.5	57.8
Vestfold	11.2	199.0	56.5
Hordaland	22.1	412.5	53.6
Østfold	12.6	238.4	53.0
Troms	7.6	147.4	51.8
Hedmark	7.1	187.4	38.0
Vest-Agder	5.5	145.5	37.7
Telemark	5.6	163.0	34.3
Sogn og Fjordane	3.6	106.7	34.1
Nordland	7.0	239.6	29.1
Finnmark	2.0	74.9	27.3
Oppland	4.5	182.5	24.6
Aust-Agder	2.3	97.6	23.6
Nord-Trøndelag	2.4	127.4	18.8
Total	**348.1**	**4 261.9**	**81.7**

[1] Average for population per 1.1 and 31.12.
Source: Statistics Norway.

Table NO16: Wholesale price indexes, Norway (1985 - 1991)

Year	All goods	Consumer goods	Producer goods	Motor vehicles, gasoline and fuel
1985	100.0	100.0	100.0	100.0
1986	105.2	110.4	107.8	94.6
1987	114.4	119.4	118.2	102.5
1988	121.8	125.2	127.4	11.0
1989	128.6	131.5	134.3	117.2
1990	136.0	137.8	138.9	128.8
1991	144.7	143.7	143.5	144.5

Source: Weekly bulletin of statistics.

Table NO17: Value added and value added per man-year worked by activity [1], Norway (1988 - 1991)

Activity	Value added (Mio NOK)			Value added per man-year worked (Mio NOK)		
	1988	1990	1991	1988	1990	1991
Wholesale trade	17 999	17 915	17 760	0.335	0.376	0.380
Consumer goods	4 290	4 467	4 958	0.274	0.322	0.368
Producer goods	10 672	9 946	9 863	0.328	0.346	0.350
Motor vehicles, gasoline and fuel	3 037	3 503	2 939	0.543	0.685	0.572

[1] Includes only enterprises with 30 or more man-years worked.
Source: Statistics Norway.

Table NO18: Wholesale trade operating income by activity [1], Norway (1991)

Activity	Operating income					
		Share (%)				
	Value (Mio NOK)	Operating profit	Cost of goods	Compensation of employees	Other operating expenses	Ordinary depreciation
Wholesale trade	144 297	1.2	76.5	9.4	11.5	1.4
Consumer goods	57 999	1.3	83.4	6.2	8.2	0.8
Producer goods	56 827	1.0	69.0	14.2	14.1	1.7
Motor vehicles, gasoline and fuel	29 471	1.2	77.5	6.5	12.8	2.1

[1] Includes only enterprises with 30 or more man-years worked.
Source: NOS: Statistics of accounts: Manufacturing, wholesale and reatail sale, 1991.

SWITZERLAND

1. Introduction and overview

For a landlocked country like Switzerland, with practically no raw material resources of its own, wholesale trade is an extremely important activity whose fortunes are closely bound up with the competitiveness of Swiss industry, which depends on its ability to meet the demand for its products (in terms of volume and the deadlines which have to be met) and the high quality and low prices of its raw materials and semi-finished products. Switzerland is also notable for the absence of certain branches of activity: the motor vehicle industry is a case in point. Hence the importance of the role played by wholesale trade, especially as far as imports of articles of everyday consumption and durable goods for use by households are concerned.

Swiss wholesalers have been outstandingly active players in the field of international trade for more than a hundred years now. The leading Swiss firms include, for example, André, Desco von Schulthess, Siber Hegner and UHAG Übersee Handel AG. They enjoy a relatively large share of certain segments of the market and the performance of these operators in the domains of world trade and transit has made a handsome contribution, over the years, to the very positive international image of the Swiss wholesale trade sector, even if the scale of their operations within the country is relatively modest in terms of turnover and employment because their activities are mainly located outside Switzerland.

Imports of goods and services are a particularly large component of the country's GDP (34% in 1991), so it is hardly surprising that the wholesale trade accounts for a very substantial percentage of Switzerland's imports. Wholesaling does not loom so large on the export front, however, because the country's manufacturing enterprises frequently sell their products directly abroad via their own sales networks or have their own production units in foreign countries.

The country's wholesale and commission trade employs a total of approximately 215 000 persons (including about 177 000 full-timers) and is Switzerland's fourth-ranking sector of activity in this respect, after retailing (which employs a total of 392 000 persons), construction and the hotel and catering industry. In 1991, a total of nearly 20 000 businesses in the wholesale and commission trade sectors generated a total value added of CHF 26 billion, or 7.7% of the country's GDP.

The choice of 1991 as the reference year for this study was determined by the availability of data. It needs to be emphasised, in this context, that the wholesale trade sector is particularly difficult to define, partly because the boundaries of wholesale and retail trade frequently overlap and partly because many industrial enterprises are engaged, to a certain extent, in wholesale trading activities. The data and analyses in the present report will focus on the local units whose main activity, according to their own census returns, is in the wholesale sector[1].

2. Role of the wholesale trade in the Swiss economy

2.1. Position of the wholesale sector in the national economy

In 1991, there were 18 500 wholesale operators (excluding commission agents) in Switzerland, representing 6.5% of all enterprises recorded by the census. The sector employed some 211 000 persons, 173 000 on a full-time basis, representing 5.6% of the total number of persons employed in Switzerland. There are relatively fewer large companies in the wholesale sector than in the Swiss economy as a whole.

Most of the men in this sector (over 90%) are employed on a full-time basis, while the great majority (75%) of part-timers are women. The 38 000 part-timers employed represent 18% of the total number employed, which is slightly below the national average. The fact that this proportion increased at an above-average rate up to 1990 was due to the favourable economic situation and a marked rise in imports.

In 1991, turnover in the wholesale sector totalled CHF 217 billion, or approximately CHF 1.1 million per person employed (on a full-time equivalent basis). A total of CHF 2 billion was invested in this sector, with the main emphasis on machinery and equipment, although investment in fixed capital per person employed was well below the national average for the actively occupied population, largely because of the

[1] In the 1991 business census, the questionnaire was restricted to a small number of characteristics (in comparison with 1985). Hence the possibility of distortions in the breakdown by sector, particularly at the finer levels. That is why many businesses have been classified under the heading of 'other specialised wholesale enterprises'.

low level of investment in construction.

The substantial contribution of wholesale trade to the country's gross domestic product (7.5% of gross value added) reflects the high level of value added per person employed in the wholesale sector (CHF 130 000 per actively occupied person) and is 40% higher than the average for the whole economy (CHF 93 000).

The hallmarks of the period between 1985 and 1991 were steady economic growth and a shortage of manpower. The fact that this was a particularly favourable period for wholesale trade is further evidence of the dynamism of this sector in which the rate of increase in the number of enterprises and local units and the number of persons employed was three times the national average. But the economic situation was much less rosy after 1991, resulting in cutbacks and rising unemployment in the wholesale trade.

2.2. Anatomy of the wholesale sector

The areas in which the main strengths of the wholesale trade in Switzerland are to be found are those of food products (including wines and spirits and fruit and vegetables in particular), capital goods (largely in the form of machinery for use in industry) and private cars and commercial vehicles (a very large percentage of which are imported). The period 1985-1991 was marked by a rise of 39% in the number of wholesale trade enterprises, which was well above the average of 14% for the economy as a whole. This rapid rate of growth was part of a general movement; but it was also a response to the steadily increasing specialisation of an increasingly global economy (which is closely bound up with the pace of technological progress) which has obliged Swiss businesses to obtain an ever-increasing volume of specialised finished and semi-finished products on the world market with the aim of keeping ahead of their competitors. The branches of the wholesale market which have recorded a particularly high rate of growth include textiles, paper and paper products, building materials, machinery in general and office machinery in particular. The last-mentioned branch has expanded rapidly in response to the massively increasing use of computers throughout the economy and new businesses have been set up to capitalise on this.

The typical wholesale business in Switzerland consists of a single establishment. The number of local units in the wholesale sector is only 13% higher than the total number of enterprises in that sector, compared with 27%, on average, for Switzerland as a whole.

The petroleum industry is one of Switzerland's leading importers. In 1993 the country imported 11.5 million tonnes of crude oil worth CHF 3 billion. The country is still highly dependent on these imports, which currently account for 63% of its total energy consumption, followed by electricity and natural gas with 21% and 11% respectively. 48% of these imports are brought into the country by pipeline and 34% by inland waterway (up the Rhine) while imports by rail (which are still falling) account for little more than 11% of the total. Switzerland's two refineries produce 34% of the petroleum products sold on the internal market.

The majority of Switzerland's wholesale operators are joint stock companies, particularly in the case of minerals and metals (88%), energy products (82%) and office machinery (83%). Almost a quarter of the country's wholesalers are sole proprietorships. These are most frequently to be found in the sectors of agricultural products (53%) foodstuffs (28%) and clothing (27%). Cooperatives are few in number but are the third most important legal form from the standpoint of employment: they are most numerous in the food sector (5.2%) and the agricultural products sector (5.1%). The role of the operators with other kinds of legal status is relatively insignificant and their numbers declined considerably between 1985 and 1991.

The breakdown of wholesale enterprises by size is practically the same as the breakdown for the economy as a whole. The great majority (83%) are small enterprises with fewer than 10 employees. Their numbers increased at a faster-than-average rate between 1985 and 1991, reflecting the fact that a period of economic expansion is a relatively favourable time for setting up in business with limited financial resources. Compared with the economy as a whole, however, the wholesale sector has two special features. On the one hand, approximately 32% of those employed full-time in this sector are to be found in businesses with 20-100 employees (compared with 22% for the economy as a whole); on the other hand, the percentage to be found in large enterprises is strikingly small. The latter include subsidiaries of several large foreign wholesale enterprises with their own distribution companies in Switzerland.

Zurich is the most attractive area for companies in the wholesale trading sector, by virtue of its economic weight and its favourable situation as far as communications are concerned. 14% of persons employed in the wholesale sector are to be found in the Canton of Zug, to which wholesalers are lured both by its closeness to Zurich and by tax incentives.

The other areas which play a particular important role in the wholesale sector are the frontier zones (Basel, Geneva, Ticino), the cantons on the east-west transit axis (Luzern, Fribourg, Aargau) and the cantons offering fiscal advantages (Schwyz, Nidwalden).

The activities of Switzerland's wholesalers are very largely concentrated in imports of consumer goods and internal trade. Because Switzerland is short of raw materials, few of the country's wholesalers are active on the export front. It is therefore hardly surprising that only one of the 68 member associations of the national association of importers and wholesalers (the "Union du commerce d'importation et de gros suisse") is export-oriented, and that is the association of cheese exporters.

Switzerland has a small number of wholesale enterprises whose expertise in world-wide trade and transit has enabled them to play a very important role at that level for more than half a century. Most of the goods in which they deal never see Switzerland. Their exports of merchandise from Switzerland are very modest, and so is the corresponding internal turnover. They also have few employees in Switzerland. Some of these international trading companies specialise in specific groups of products. André, for example, specialises in cereals. There are also cases of geographical specialisation, with the emphasis on certain specific continents, as in the case of Zuellig International Ltd, whose activities are concentrated in the Far East.

It is possible to distinguish between two types of Swiss wholesalers, namely those which specialise in the distribution throughout the country of certain specific articles (and which are frequently subsidiaries of foreign producers) and those which provide certain regions of the country with a larger range of merchandise. Swiss importers frequently procure their merchandise via a European importer acting as an intermediary and conclude concession contracts with territorial exclusion clauses. The very few wholesalers who combine the activities of specialised importers and general wholesale traders are coming under steadily increasing pressure because their costs are too high.

The Swiss market is a good testing ground for foreign manufacturers in search of markets for new products, and the Swiss wholesale market makes particularly good use of these opportunities. Ever-increasing quantities of articles of everyday consumption are directly imported by the major Swiss distributors, whereas the more risky types of goods are still handled by the country's wholesale traders. In recent years, Switzerland has seen a multiplication of the number of subsidiaries of foreign manufacturers operating as distribution companies, in particular in the motor vehicle and consumer electronics sectors, in which they have replaced the Swiss wholesale operators.

For some time now, cash-and-carry food stores have been gaining ground in Switzerland. Several big companies have large self-service stores selling low-priced merchandise to exploit this niche in the market (they include Prodega Angehrn, and Leuthold). There are also large vegetable markets (Engros) in which various wholesale merchants work together (for example in Zurich and Basel).

According to VSIG (the national association of importers and wholesalers), the clientele of the country's wholesale operators can be broken down into three more or less equally important categories, namely an industrial clientele (industrial goods and consumer goods), an export clientele and a retail clientele. It should be noted, in particular, that small retail outlets (excluding the big retailers) purchase between 60% and 70% of their food products from wholesale traders.

2.3. Employment in Swiss wholesaling

Between 1985 and 1991, employment in this sector (full-time and part-time) increased more rapidly than the all-sectors average (nearly 29% compared with 15%). This is further confirmation (in addition to the growth in the number of wholesale enterprises) of the dynamism of wholesale trade in relation to the economy as a whole. Three quarters of those employed full-time in this sector are men and three quarters of those employed part-time are women.

A third (33%) of those employed in the wholesale trade in Switzerland are in the wholesale of non-food consumer goods, including, in particular, business and household equipment (16%), including white goods and TV. The second sector, in terms of employment, is that of inter-industrial equipment (nearly 26%), including office machinery and computers (11%), followed by non-agricultural semi-finished products (19%) and food products (14%). The sectors in which employment increased most rapidly over the period were those of office equipment, chemical products, machinery and motor vehicles.

In the wholesale sector, most persons employed are between 25 and 35 years of age. Compared with the other sectors of the economy, the youngest age group (15-19 years) is poorly represented: there are relatively few apprentices in this sector.

Nearly 30% of the persons employed in the wholesale trade in Switzerland are in the unskilled manual category, in which the percentage of women is strikingly above average (58%, compared with 35% for the sector as a whole). The majority of unskilled jobs are held by women. The percentage of foreign employees, at 20%, is well above the national average.

The self-employed, who play a major role in the Swiss economy as a whole, are under-represented in the wholesale sector (5.3%): directors and senior management are particularly well represented at almost 15%.

2.4. Wholesale turnover, value added and investment in Switzerland

The inter-industrial equipment sector, with a turnover of CHF 66 billion, makes the highest contribution (30%) to total turnover in the wholesale sector, closely followed by non-agricultural intermediate products (CHF 62 billion, or 29% of the total). A quarter of turnover in the wholesale sector is generated in the domain of non-food consumer goods (more than CHF 54 billion), with food products and agricultural products somewhat behind (16% of the total).

A third of total gross value added in the wholesale sector is generated by the wholesale of non-food consumer goods including, in particular, business and household equipment (16%) and pharmaceutical and medical products. Two sectors take 27% and 26%: inter-industrial equipment, mainly in the form of office machinery and computers (14%) and other machinery (13%), and non-agricultural intermediate products, mainly in the form of raw materials and intermediate products (timber and construction materials, chemical products, hardware, and plumbing and heating equipment and materials). A significant contribution to value added in the wholesale sector is also made by food products (10%).

The gross margin (that is, the ratio of gross production value to turnover) for the wholesale sector is 18.3%. The margin is particularly impressive in the areas of office machinery, furniture and hardware. This is partly due to the high cost of advisory services, sales services and, to some extent, the high cost of depreciation compared with the value of the merchandise sold by wholesalers. The gross margin is relatively low, on the other hand, for machinery and motor vehicles, which are two groups of products with a relatively high market value. The average ratio of intermediate consumption to gross value added is 37%; it is highest for machinery, pharmaceutical products and fuel.

The wholesale sector in Switzerland is notable for a level of gross value added per person employed very much higher than the national average (CHF 130 000, compared with CHF 93 000 for the economy as a whole and CHF 102 000 in the services sector). This ratio is highest, by far, in the wholesale of fuel and petroleum products. The same applies to chemical products, medical products and office machinery. In the textile and agricultural products sectors, on the other hand, the gross value added per person employed is relatively low. In the wholesale sector, on average, remuneration and social contributions account for 58% of gross value added.

Investment in the wholesale trade sector is rather out of line with investment in the economy as a whole. Over 70% of capital investment in this sector is spent on equipment. Investment in logistics (in the form of buildings and equipment) makes a very important contribution to competitiveness in the wholesale trade. The impact of the recession on investment was particularly sharp, as it was indeed throughout the national economy. The relatively modest cut-back of investment in 1992 was followed by a more drastic reduction in 1993 in both construction and equipment.

2.5. Financial structures of the operators in the wholesale sector

The data on which the annual balance and the cost structure of the wholesale sector are based are provided by an annual survey of the results of around 560 wholesale enterprises with a total of approximately 60 000 persons employed.

Fixed assets account, on average, for approximately 40% of the expenditure recorded in the balance sheets of Swiss wholesale enterprises, with the rest (60%) remaining in circulation; the national average percentage is significantly lower. Credits account for about one third of the total balance, while the value of stocks is low in comparison (16%).

Certain parts of the wholesale sector need little in the way of fixed assets: for the wholesale of precision instruments, radios and TV, the rate is 20%. The picture is similar in the food products, paper and printing sectors. But other sectors, including hardware, metal articles and household goods, in which industrial installations account for half the balance sheet total, are heavily dependent on fixed assets. The operators in these branches of the wholesale sector need to invest in materials and installations on a scale which is significantly above the average. The same applies to pharmaceutical products.

The high levels of credits for chemical products and rubber (over 50%) and the high levels of stocks for fuel are partly a reflection of the statutory obligation to maintain reserves of these products at a certain minimum level.

The liabilities side is dominated by short-term borrowings (43%) followed by long-term borrowings (22%), while 34% of the overall balance is covered by equity.

The rates of financing from equity are higher than average for pharmaceutical products, machinery, motor vehicles and accessories, precision instruments and the wholesale side of the audiovisual market. On the other hand, the wholesale groups specialising in agricultural products and food products are relatively short of capital. Mortgage debt varies greatly from group to group, between 1% in the case of fuel and 25% for hardware.

The structure of expenditure tends to be strongly influenced by the main activity of the sector. Purchases of merchandise and equipment naturally account for a very large proportion (80%) of expenditure in nearly every sector of the economy. Employment costs are low in many branches of activity, and particularly low in the fuel sector in which large quantities of products are processed by relatively few personnel. The various other headings account for only a very small proportion of expenditure (between 0.4% and 1.3%).

Net profit amounts to no more than 2.2% of revenue and is rather modest in relation to certain other sectors, although it is not out of line with the average figure.

Turnover per full-time person employed varies considerably: the average figure for 1991 was CHF 883 000 per person employed, with fuel at the top of the table (CHF 2.7 million per employee), reflecting not only the quantities processed but also the heavy tax on this group of products. The other sectors marking up high levels of turnover per person employed include pharmaceutical products, chemical products and rubber, and machinery and motor vehicles. For these groups, the quantities they handle and the high market value of the various products (for example, machinery and motor vehicles) are factors of crucial importance. The levels of turnover per person employed are more modest in the areas of office machinery on the one hand and hardware, metal goods, household articles and building materials on the other. These two groups need a higher-than-average gross margin to be sure of maintaining a sufficiently high level of performance in terms of value added.

2.6. Patterns of international trading activity

In 1991, the value of exports of goods was equivalent to 26.9% of GDP, compared with 29.4% for imports. The European Union is Switzerland's most important trading partner. Data for 1993 show that approximately 73% of the country's imports are from the EU, and almost a third of those are from Germany. On the other hand, the EU takes only about 57% of Switzerland's exports, and consequently has a positive net balance of trade with Switzerland. 17% of Switzerland's imports come from other OECD countries (6.2% from the USA and 3.9% from Japan), while goods from the developing countries account for only 7.3% of the overall total.

Switzerland's leading imports by type of product are machinery and electronic products (20.0%), chemical products (13.2%) and precision instruments, clocks and jewellery (12.6% and increasing steadily since 1985). Motor vehicles account for some 9% of imports. In terms of value, energy sources account for only 3.8% of the country's imports. The period since 1985 has seen a cut-back in the value of these imports as a result of the movements in oil prices, the rise in the value of the national currency and the recession. On the other hand, the steady upward trend of imports of chemical products continued. In 1993, after six bountiful years, the motor vehicle sector was the most seriously affected by the recession.

In terms of the purpose of imported products, consumer goods are in the lead with (37.9%) followed by the raw materials and semi-finished products on which Switzerland is heavily dependent (34.7%). The third position is occupied by investment goods (23.6%). A closer look at the trend between 1985 and 1993 reveals that imports of investment goods were growing far more rapidly than those of any other of type of goods, although they fell back sharply in 1992 and 1993, as had indeed been forecast, particularly in so far as aircraft and commercial vehicles were concerned. Relatively speaking, imports of consumer goods would appear to have had a stabilising influence in the import field; the cut-backs which began in the domain of durable goods (in the form of a substantial reduction of imports of motor vehicles and furniture) started only in 1993 and then only on a limited scale.

The present analysis shows a considerable measure of variation in the scale of Swiss wholesalers' response to the recession, depending on their sector of activity. It must not be forgotten either that very substantial variations in prices were seen in the areas of energy sources, raw materials and semi-finished products. Imports are also exposed to fluctuations in exchange rates which make it necessary, now more than ever, to cover the attendant risks with the help of experts in the domains of finance and capital market operations. In recent years, however, the country's wholesale importers have benefited on several occasions from the revaluation of the CHF.

Raw materials and semi-finished products loom almost as large on the export side of the Swiss wholesale sector as on the import side. But semi-finished products make a larger contribution to exports, while raw materials represent a larger proportion of imports. Capital goods, machinery and equipment account for much larger shares of exports than of imports. Energy sources make a very small contribution to exports, whereas the percentage of consumer goods on the export side is more or less the same as for imports.

2.7. Evolution of prices in the wholesale sector in Switzerland

Wholesale prices remained practically the same from 1985 to 1993. The marginal rise in the prices of goods produced in Switzerland was offset by the negative trend in the prices of imported goods, which accounted for some 30% of the goods handled by the Swiss wholesale trade. The downward trend in the prices of imported goods was largely a reflection of the upward trend in the real external value of the CHF (the weighted value of the CHF for export trade) over the same period. The fact that the upward trend of wholesale prices was much less steep than the upward trend of consumer prices (which rose on average by 3 - 4% over the period 1985 to 1993) has, for many years now, had a clearly observable moderating effect on inflation in Switzerland.

Analysis of the figures for external trade as a whole reveals that export prices followed a steady upward trend until 1993, which was probably attributable to the strength of the CHF and improving competitiveness. In 1993, for the first time for several years, export prices failed to rise above their level of the preceding year. The level of import prices was more irregular. A rise in 1989 was followed by a fall in 1990. There was practically no change in 1991, but prices revived in 1992, only to fall back again in 1993.

2.8. Commission trade in Switzerland

The country's commission traders can be distinguished from its wholesale traders in two respects in particular. Firstly, they do not assume any responsibility for the goods they handle and secondly they constitute only a small economic sector with approximately 1 270 enterprises, 1 300 local units and 4 900 persons employed.

Commission traders account for only 7% of the total number of Switzerland's wholesale operators, and only 0.5% of the total number of Swiss businesses. Small enterprises with 1-9 employees are even more dominant in the commission trade sector (95%) than in the total population of wholesale businesses (83%). The activities of the majority of these enterprises (53%) are spread over several different areas; the second largest percentage consists of specialists in the wholesale of machinery, motor vehicles and accessories.

Three-quarters of the 4 900 persons employed in the commission trade in Switzerland work full-time, compared with 82% in the country's wholesale enterprises. The percentages of female employees (33% full-time and 76% part-time) are higher than the average for the wholesale sector (25% and 74% respectively).

The percentage of persons involved in commission trade as sole proprietors or in a managerial capacity is higher than the average for the wholesale sector. This may simply reflect the numbers of small enterprises in the commission trade sector.

3. Statistical sources

The above analysis is largely based on the official sources of the Federal Statistical Office and other Federal sources including, in particular, the results of the National Accounts (Production Accounts), the Business Census of 1991, the Population Census of 1990 and the country's Foreign Trade Statistics. Every effort was made to maximise the degree of comparability at European level. Use was also made of supplementary sources including quasi-official services and associations in order to take the qualitative aspects and most recent trends into account.

Table CH1: Key statistics for wholesale trade in the Swiss economy (1991) [1]

Variable	Value
Number of enterprises	18 460
Number of local units	20 785
Total persons employed	210 634
Women	72 253
Women in %	34.3
Full-time employment	172 744
% of total persons employed	82.0
% of women in total full time employment	25.4
Part-time employment	37 890
% of total persons employed	18.0
% of women in part time employment	74.9
Turnover (Mio CHF)	217 005
Turnover per person employed (CHF)	1 132 000
Gross production value (GPV) (Mio CHF)	39 648
GPV as proportion of turnover (%)	18.3
Intermediate consumption (Mio CHF)	14 693
as % of GPV	37.1
Gross value added (Mio CHF)	24 955
as % of GPV	62.9
Gross value added per person employed (CHF)	130 185
Personnel costs (Mio CHF)	14 469
% of gross value added	58.0
Personnel costs per person employed (CHF)	75 483
Fixed capital formation (Mio CHF)	2 270
Capital expenditure on new construction [2] (Mio CHF)	659
Capital expenditure on machinery and equipment (Mio CHF)	1 611
Fixed capital formation per person employed (CHF)	10 777

[1] Excluding commission trade.
[2] Extrapolation, without investments in residential construction.
Source: Census of enterprises 1991, Bundesamt für Statistik.
Production accounts 1991, Bundesamt für Statistik.
Bureau of Economic Studies, ETH (Zürich).

Table CH2: Key statistics for commission trade in the Swiss economy (1991)

Variable	Value	Share %
Number of enterprises	1 269	
Number of local units	1 309	
Number of enterprises by activity		100.0
raw materials, construction materials, fuels		6.2
textiles, clothing, footwear		13.6
food and luxury products		6.6
machinery, vehicles, technical equipment		20.1
other goods		53.5
Number of enterprises by employment size-class		100.0
1-9		95.3
10 -19		3.4
20- 49		1.1
50 - 99		0.1
100 -199		0.1
Total persons employed	4 900	
Women		43.9
Full-time		75.4
Women		33.3
Part-time		24.6
Women		76.4
Persons employed by status [1]		100.0
self-employed		19.4
family helpers		4.1
managers, executive staff		15.7
middle ranking and junior executives		15.8
manual/non-manual workers		41.4
apprentices		2.0
not specified		1.6

[1] Source: population census 1990.
Source: Census of enterprises 1991, Bundesamt für Statistik.

Table CH3: The role of wholesale trade in the Swiss economy (1991) [1]

	Switzerland total	Wholesale trade	Wholesale trade (%)
Number of enterprises [2]	281 957 [3]	18 460	6.5
Number of local units	347 519 [3]	20 785	6.0
Number of persons employed [4]	3 762 005 [3]	210 634	5.6
Full-time	2 911 354	172 744	5.9
Women	842 859	43 861	5.2
Part-time	850 651	37 890	4.5
Women	641 122	28 392	4.4
Gross production value (GPV) (Mio CHF)	656 712	39 648	6.0
Intermediate consumption (Mio CHF)	325 637	14 693	4.5
Gross Production Value (%)	50.0	37.1	
Gross value added (GVA) (Mio CHF)	331 075	24 955	7.5
Personnel costs (%)	62.1 [6]	58.0	
GVA per person employed (CHF)	92 886	130 185	
Fixed capital formation, total (Mio CHF)	84 810	2 270	2.7
Capital expenditure on new construction (Mio CHF) [5]	55 880	659	1.2
Capital expenditure on machinery and equipment (Mio CHF)	28 930	1 611	5.6
Per person employed (CHF)	23 794	10 777	

[1] Excluding commission trade.
[2] Only one enterprise in the public sector.
[3] Agriculture excluded.
[4] Census of enterprises.
[5] Estimate, without investment in residential property.
[6] 1985.
Source: Census of enterprises 1991, Bundesamt für Statistik.
Production accounts 1991, Bundesamt für Statistik.

Table CH4: Number of enterprises and local units of wholesale trade by activity, Switzerland (1985 - 1991)

Activity	Enterprises					Local units				
	1985		1991		Growth (%)	1985		1991		Growth (%)
	Number	Share (%)	Number	Share (%)	1991/85	Number	Share (%)	Number	Share (%)	1991/85
Agricultural materials and food	**2 810**	**21.2**	**3 066**	**16.6**	**9.1**	**3 297**	**21.1**	**3 464**	**16.7**	**5.1**
Agricultural raw materials	816	6.2	894	4.8	9.6	907	5.8	973	4.7	7.3
Food, beverages and tobacco	1 994	15.1	2 172	11.8	8.9	2 390	15.3	2 491	12.0	4.2
Non-food products	**5 199**	**39.3**	**6 785**	**36.8**	**30.5**	**5 835**	**37.4**	**7 463**	**35.9**	**27.9**
Textiles, clothing and footwear	1 008	7.6	1 310	7.1	30.0	1 086	7.0	1 405	6.8	29.4
Equipment for professional or domestic use	2 180	16.5	2 747	14.9	26.0	2 510	16.1	3 115	15.0	24.0
Pharmaceutical goods, perfume and cosmetics	791	6.0	971	5.3	22.8	876	5.6	1 067	5.1	21.8
Other miscellaneous consumer goods	1 220	9.2	1 757	9.5	44.0	1 363	8.7	1 876	9.0	37.6
Intermediate products and industrial machinery	**4 674**	**35.3**	**7 886**	**42.7**	**68.7**	**5 852**	**37.5**	**9 079**	**43.7**	**55.1**
Non agricultural intermediate products	2 531	19.1	4 069	22.0	60.8	3 072	19.7	4 595	22.1	49.6
Energy products and miscellaneous ores and minerals	227	1.7	241	1.3	6.2	298	1.9	315	1.5	5.7
Raw materials and intermediate products	1 440	10.9	2 003	10.9	39.1	1 862	11.9	2 414	11.6	29.6
Other products	864	6.5	1 825	9.9	111.2	912	5.8	1 866	9.0	104.6
Industrial machinery and equipment	2 143	16.2	3 817	20.7	78.1	2 780	17.8	4 484	21.6	61.3
Machinery, equipment and supplies	1 796	13.6	2 772	15.0	54.3	2 160	13.8	3 138	15.1	45.3
Other machinery and equipment	347	2.6	1 045	5.7	201.2	620	4.0	1 346	6.5	117.1
Other wholesale	**562**	**4.2**	**723**	**3.9**	**28.6**	**627**	**4.0**	**779**	**3.7**	**24.2**
Total	**13 245**	**100.0**	**18 460**	**100.0**	**39.4**	**15 611**	**100.0**	**20 785**	**100.0**	**33.1**

Source: Production accounts, 1985 and 1991, Bundesamt für Statistik.

Table CH5: Wholesale trade enterprises by legal status, Switzerland (1985 - 1991)

	Enterprises					Persons employed (full-time)				
	1985		1991		Growth (%)	1985		1991		Growth (%)
	Number	Share (%)	Number	Share (%)	1991/85	Number	Share (%)	Number	Share (%)	1991/85
Sole proprietorship	3 538	26.7	4 209	22.8	19.0	9 940	7.1	9 378	5.4	-5.7
Simple partnership	75	0.6	103	0.6	37.3	326	0.2	356	0.2	9.2
Partnership	423	3.2	520	2.6	22.9	2 865	2.1	2 442	1.4	-14.8
Limited partnership	259	2.0	219	1.2	-15.4	1 601	1.1	1 252	0.7	-21.8
Joint-stock company	8 396	63.3	12 956	70.2	54.3	114 723	82.2	150 366	87.0	31.1
Private limited company	256	1.9	240	1.3	-6.3	1 882	1.3	1 208	0.7	-35.8
Cooperatives	203	1.5	204	1.1	0.5	7 501	5.4	7 641	4.4	1.9
Other legal forms [1]	122	0.9	9	0.1	-92.6	673	0.5	101	0.1	-85.0
Total	**13 272**	**100.0**	**18 460**	**100.1**	**39.0**	**139 511**	**100.0**	**172 744**	**100.0**	**23.8**

[1] Numbers for 1985 and 1991 are not comparable.
Source: Census of enterprises 1991, Bundesamt für Statistik.

Table CH6: Number of enterprises and persons employed in wholesale trade, by enterprise size-class, Switzerland (1985 -1991)

Size-class	Total economy		Wholesale trade					
			Enterprises			Persons employed (full time)		
	Structure of enterprises (%)	Structure of employment (%)	Number	Share (%)	Growth (%) 1991/85	Number	Share (%)	Growth (%) 1991/85
1-9	85.6	21.7	15 380	83.3	43.5	39 883	23.1	35.2
10-19	7.3	9.4	1 491	8.1	25.8	20 007	11.6	25.9
20-49	4.4	12.7	1 011	5.5	14.5	30 692	17.8	15.7
50-99	1.4	9.7	355	1.9	17.2	24 094	13.9	13.8
100-199	0.7	9.6	136	0.7	21.4	18 299	10.6	19.2
200-499	0.4	10.9	66	0.4	32.0	19 670	11.4	34.7
≥500	0.2	26.0	21	0.1	10.5	20 099	11.6	22.1
Total	**100.0**	**100.0**	**18 460**	**100.0**	**39.1**	**172 744**	**100.0**	**23.8**

Source: Census of enterprises 1991, Bundesamt für Statistik.

Table CH7: Employment in wholesale trade by full/part-time and main activity, Switzerland (1991)

Activity	Total employment		Full-time employed		Part-time employed	
	Number	Share (%)	Number	Female (%)	Number	Female (%)
Agricultural materials and food	**36 553**	**17.4**	**28 889**	**24.5**	**7 664**	**69.5**
Agricultural raw materials	7 861	3.7	5 885	26.3	1 976	68.4
Food, beverage and tobacco	28 692	13.6	23 004	24.0	5 688	69.9
Non-food products	**69 736**	**33.1**	**54 724**	**33.2**	**15 012**	**81.0**
Textiles, clothing and footwear	8 471	4.0	6 070	50.4	2 401	84.6
Textiles	4 685	2.2	3 447	46.6	1 238	84.2
Clothing and footwear	3 786	1.8	2 623	55.3	1 163	85.0
Electrical household appliances and radio and television goods	33 512	15.9	27 636	25.9	5 876	76.9
Pharmaceutical goods, perfume and cosmetics	13 806	6.6	10 416	41.9	3 390	85.3
Other household goods	13 947	6.6	10 602	34.1	3 345	81.1
Intermediate products and industrial machinery	**93 823**	**44.5**	**80 757**	**20.7**	**13 066**	**71.8**
Non-agricultural intermediary product	39 494	18.8	33 482	22.6	6 012	71.2
Energy products and miscellaneous ores and minerals	3 846	1.8	3 377	21.4	469	73.1
Raw materials and intermediate products	26 394	12.5	22 834	18.7	3 560	74.4
Wood, construction materials	14 532	6.9	12 631	15.0	1 901	70.1
Hardware, plumbing and heating equipment and supplies	6 217	3.0	5 468	17.7	749	79.8
Chemical products	5 645	2.7	4 735	29.5	910	79.0
Other products	9 254	4.4	7 271	26.5	1 983	65.0
Other intermediate products	6 981	3.3	5 261	32.5	1 720	67.3
Waste and scrap	2 273	1.1	2 010	10.8	263	49.8
Interindustrial equipment	54 329	25.8	47 275	19.3	7 054	72.3
Other machinery for use in industry, trade and navigation	32 083	15.2	27 398	18.0	4 685	73.3
Office machinery and equipment	22 246	10.6	19 877	21.0	2 369	70.2
Other wholesale	**10 522**	**5.0**	**8 374**	**31.0**	**2 148**	**74.9**
Total	**210 634**	**100.0**	**172 744**	**25.4**	**37 890**	**74.9**
Total Switzerland [1]	**3 762 005**	**100.0**	**2 911 354**	**29.0**	**850 651**	**75.4**

[1] Agriculture excluded.
Source: Census of enterprises 1991, Bundesamt für Statistik.

Table CH8: Employment in wholesale trade by age group, Switzerland (1990)

Age class	Age distribution of all persons employed	Employment in wholesale trade [1]		
	Share (%)	Number	Share (%)	Women (%)
15-19	6.3	6 502	3.6	53.2
20-24	11.8	20 069	11.3	49.2
25-29	13.5	26 186	14.7	38.9
30-34	12.3	23 013	12.9	30.3
35-39	11.5	20 541	11.5	31.9
40-44	11.9	22 311	12.5	34.0
45-49	10.9	21 249	11.9	33.7
50-54	8.6	15 784	8.9	32.5
55-59	7.2	12 389	7.0	28.9
60-64	4.5	7 721	4.3	20.8
65-69	1.0	1 639	0.9	24.4
70-74	0.3	485	0.3	23.1
≥75	0.2	306	0.2	21.6
Total	**100.0**	**178 195**	**100.0**	**35.2**

[1] Population census: 1990. These figures are not comparable with those of the survey on enterprises in 1991.
Source: Population census 1990, Bundesamt für Statistik.

Table CH9: Employment in wholesale trade by socio-professional category, Switzerland (1990)

Socio-professional category	Employment in wholesale [1]			
	Number	Share (%)	Women (%)	Foreigners (%)
Top management	4 501	2.5	6.9	24.3
Liberal professions	499	0.3	8.6	35.3
Other self-employed	9 503	5.3	15.1	12.3
Academic professions and senior executives	21 292	12.0	11.8	20.0
Intermediate professions	36 679	20.6	25.3	14.8
Non skilled manual occupations	52 569	29.5	58.1	11.9
Skilled manual occupations	18 716	10.5	9.9	24.2
Unskilled manual and non-manual workers	30 461	17.1	49.0	42.3
Unspecified	3 975	2.2	44.9	27.0
Total	**178 195**	**100.0**	**35.2**	**20.7**

[1] Population census 1990. These figures are not comparable with those of the survey on enterprises in 1991.
Source: Population census 1990, Bundesamt für Statistik.

Table CH10: Employment in wholesale trade by status, Switzerland (1990)

Status	Employment			
	Total economy	Services sector	Wholesale trade [1]	
	Share (%)	Share (%)	Number	Share (%)
Self-employed	10.6	9.6	10 991	6.2
Family helpers	3.4	2.3	3 917	2.2
Managers, executive staff	5.6	6.5	19 220	10.8
Middle-ranking and junior executives	17.4	18.7	34 872	19.6
Manual/non-manual workers	54.8	54.3	101 037	56.7
Apprentices	5.5	5.5	4 904	2.7
Not specified	2.7	3.1	3 254	1.8
Total	**100.0**	**100.0**	**178 195**	**100.0**

[1] Population census 1990. These figures are not comparable with those of the survey on enterprises in 1991.
Source: Population census 1990, Bundesamt für Statistik.

Table CH11: Turnover, gross value added and personnel costs in wholesale trade, by activity, Switzerland (1991)

Activity	Turnover		Gross production value (GPV)			Gross value added (GVA)			
	Value (Mio CHF)	Share (%)	Value (Mio CHF)	GPV as % of turnover	Intermediate consumption as % of GPV	Value (Mio CHF)	Share (%)	GVA per person employed [1] (1 000 CHF)	Personnel costs as % of GVA
Agricultural materials and food	34 363	15.8	5 051	14.7	34.2	3 317	13.3	101	60.0
Agricultural raw materials	5 303	2.4	968	18.3	29.6	680	2.7	99	58.3
Food, beverages and tobacco	29 060	13.4	4 083	14.1	35.3	2 637	10.6	102	60.4
Non-food products	54 556	25.1	13 119	24.0	35.4	8 458	33.9	142	55.2
Textiles, clothing and footwear	7 063	3.3	1 156	16.4	32.2	744	3.0	105	64.4
Equipment for professional or domestic use	18 693	8.6	5 949	31.8	32.8	4 016	16.2	131	54.1
Pharmaceutical goods, perfume and cosmetics	21 767	10.0	3 954	18.2	41.3	2 325	9.3	192	51.2
Other household goods	7 033	3.2	2 060	29.3	33.5	1 373	5.5	113	60.3
Intermediate products and machinery	128 086	59.0	21 481	16.8	35.8	13 180	52.8	155	59.2
Non-agricultural intermediate products	62 455	28.8	10 063	16.1	30.2	6 429	25.8	171	51.5
Energy products and miscellaneous ores and minerals	12 222	5.6	2 081	17.0	43.1	1 187	4.8	329	28.7
Raw materials and intermediate products	20 663	9.5	4 796	23.2	30.6	3 329	13.3	150	55.1
Other products	29 570	13.6	3 186	10.8	40.1	1 913	7.7	108	59.4
Industrial machinery, equipment	65 631	30.2	11 418	17.4	40.7	6 751	27.1	139	66.6
Machinery and equipment other than office machinery	55 968	25.8	6 386	11.4	49.0	3 217	12.9	108	73.1
Office machinery and equipment	9 683	4.5	5 032	52.0	30.1	3 534	14.2	168	60.7
Other wholesale	:	:	:	:	:	:	:	:	:
Total	**217 005**	**100.0**	**39 648**	**18.3**	**37.1**	**24 955**	**100.0**	**130**	**58.0**

[1] Person in full-time employed.
Source: Production accounts, 1991, Bundesamt für Statistik.

Table CH12: Wholesale trade capital expenditure, Switzerland (1991 - 1993)

Capital expenditure	1991	1992	1993	Growth (%)	
	Value (Mio CHF)	Value (Mio CHF)	Value (Mio CHF)	1992/91	1993/92
Fixed capital formation	2 270	2 135	1 610	-5.9	-24.6
Capital expenditure on construction [1]	659	724	541	9.9	-25.3
Capital expenditure on machinery and equipment	1 611	1 411	1 069	-12.4	-24.2

[1] Estimate, without investment in residential property.
Source: Survey on investments, ETH (Zürich) 1991-1993.

Table CH13a: Balance-sheet indicators and cost structure of main wholesale trade branches, Switzerland (1991)

	Wholesale total	Agriculture and forestry products	Food and luxury products	Paper and paper products, printing	Chemical products, rubber	Fuels, petroleum products
Assets as % of balance-sheet total						
Current assets	60.6	59.1	67.5	69.2	65.3	59.2
of which debtors	31.5	34.3	30.1	32.6	51.1	19.2
of which stocks	16.0	17.9	29.8	16.9	9.4	34.6
Fixed assets	39.4	40.9	32.5	30.9	34.7	40.8
of which physical investments	17.3	29.1	23.9	23.0	8.6	27.5
Liabilities as % of balance-sheet total						
Short-term liabilities	43.2	50.2	53.1	36.1	41.8	49.9
Long-term debts	22.6	36.5	24.7	25.0	23.0	13.6
of which mortgages	7.4	14.8	12.9	16.2	4.1	1.1
Rate of equity financing [1]	34.2	13.3	22.1	39.0	35.2	36.5
Cost structure in % of expenditure						
of which, in %						
Goods and materials	81.8	80.0	85.8	75.7	79.0	84.2
Wage and salaries	6.7	7.6	5.8	10.0	6.5	2.9
Social contributions	1.1	1.2	0.9	1.5	1.1	0.6
Rental of premises	0.4	1.1	0.3	0.8	0.1	0.3
Interest	1.2	3.2	1.0	1.1	1.3	1.2
Depreciation of fixed assets	1.3	1.9	1.1	1.7	0.7	2.1
Other depreciation	0.1	0.1	0.1	0.1	0.2	0.2
Maintenance and repairs	0.5	0.7	0.7	0.6	0.4	0.8
Other operating expenditure	6.9	3.7	4.2	7.5	9.9	7.2
Non-operating and extraordinary expenditure	0.7	0.5	0.3	1.0	0.8	0.6
Net profit as a % of revenue	2.2	0.5	0.7	1.6	4.1	2.4

[1] Rate of equity financing = (equity/invested capital) * 100.
Source: Value added statistics,1991-1992, Bundesamt für Statistik.

Table CH13b: Balance-sheet indicators and cost structure of main wholesale trade branches, Switzerland (1991)

	Construction materials, timber, accessories	Iron, steel, non-ferrous metals, semi-finished products	Fancy goods, metal items, housewares	Machinery, vehicles, technical equipment	Precision machinery and optics; radios, televisions, audio equipment	Office machinery, office organization, computers	Pharmaceuticals, cosmetics, medical and cleaning products
Assets as % of balance-sheet total							
Current assets	58.2	59.9	52.0	60.2	80.4	56.6	53.2
of which debtors	36.6	30.6	27.1	31.0	42.9	39.5	28.6
of which stocks	13.4	21.6	11.1	21.8	22.0	5.1	9.3
Fixed assets	41.9	40.1	48.0	39.9	19.6	43.4	46.8
of which physical investments	33.0	27.0	29.0	11.0	15.1	18.6	11.0
Liabilities as % of balance-sheet total							
Short-term liabilities	36.5	39.2	36.9	40.4	41.1	45.2	39.3
Long-term debts	37.7	34.2	37.5	11.8	10.7	11.2	8.4
of which mortgages	23.7	23.4	25.4	2.4	2.9	1.3	2.5
Rate of equity financing [1]	25.8	26.6	25.6	47.8	48.1	43.6	52.4
Cost structure in %							
of which, in %							
Goods and materials	77.5	76.8	70.6	86.6	72.4	46.2	80.5
Wage and salaries	10.5	10.0	13.1	4.8	9.6	21.7	5.1
Social contributions	1.7	1.6	1.9	0.9	1.9	3.0	1.2
Rental of premises	0.9	0.6	0.5	0.2	0.4	1.7	0.1
Interest	1.1	1.9	2.5	0.6	0.6	0.5	0.6
Depreciation of fixed assets	2.0	2.3	1.7	0.5	1.3	4.0	0.6
Other depreciation	0.1	0.1	0.2	0.0	1.0	0.4	0.1
Maintenance and repairs	1.3	0.9	0.9	0.3	0.8	1.0	0.3
Other operating expenditure	3.7	5.1	7.7	5.5	11.2	17.9	10.9
Non-operating and extraordinary expenditure	1.4	0.5	0.9	0.6	1.0	3.6	0.6
Net profit as a % of revenue	0.9	0.9	2.7	-0.5	2.3	5.3	7.7

[1] Rate of equity financing = (equity/invested capital) * 100.
Source: Value added statistics 1991-1992, Bundesamt für Statistik.

Table CH14: Key indicators of major wholesale trade branches, Switzerland (1991)

	Rate of self-financing (%) [1]	Rate of equity financing (%) [2]	Return on equity (%) [3]	Return on sale (%) [4]	Cash flow [5] as a % of equity	Turnover per person full-time employed
Agriculture and forestry products	129.8	13.3	5.5	0.5	2.7	629
Food and luxury products	178.1	22.1	9.2	0.8	2.0	867
Paper and paper products, printing	248.6	39.0	8.5	1.6	3.4	531
Chemical products, rubber	1 238.3	35.2	22.7	4.8	5.8	1 201
Fuels, petroleum products	114.0	36.5	17.4	2.5	4.7	2 703
Construction materials, lumber, accessories	469.2	25.8	7.3	0.9	3.0	477
Iron, steel, non-ferrous metals, intermediates	160.2	26.6	0.5	0.9	3.4	533
Fancy goods, metal items, housewares	389.8	25.6	14.4	2.9	4.9	355
Machinery, vehicles, technical equipment	518.2	47.8	-2.4	-0.5	0.1	1 039
Precision machinery and optics; radios, televisions, audio equipment	498.5	48.1	11.3	2.4	4.7	618
Office machinery, office organization, computers	449.7	43.6	16.4	7.0	12.5	301
Pharmaceuticals, cosmetics, medical and cleaning products	1 578.2	52.4	27.1	27.1	8.9	1 477
Total wholesale trade [6]	**451.6**	**34.2**	**12.8**	**12.8**	**3.8**	**883**

[1] Rate of self-financing = (reserves * retained earnings) * 100/equity.
[2] Rate of equity financing = equity * 100/ invested capital.
[3] Return on equity = (net profit - net loss)/equity.
[4] Return on sales = (net profit - net loss)/sales.
[5] Cash flow = net profit - net loss +depreciation and other amortization.
[6] Includes all sectors (including sectors not mentioned).
Source: Value added statistics 1991-1992, Special survey evaluation, Bundesamt für Statistik.

Table CH15: Imports and exports by type of goods and purpose, Switzerland (1985 - 1993)

Commodity group	Exports		Imports				
	Value (Mio CHF)	Share (%)	Value (Mio CHF)	Share (%)	Growth (%)		Average annual growth rate (%)
	1993		1993		1992/91	1993/92	1991/85
Type of goods							
Agriculture and forestry products	3 426	3.7	7 869	8.8	-1.6	-1.4	1.4
Energy sources	116	0.1	3 440	3.8	-10.6	-11.7	-6.6
Textiles, clothing, footwear	4 329	4.6	8 525	9.5	-1.2	-2.9	3.4
Paper and printed products	2 157	2.3	3 667	4.1	0.2	-4.0	7.4
Leather, rubber, plastics	2 679	2.9	3 401	3.8	3.6	-3.2	5.4
Chemicals	22 348	24.0	11 854	13.2	7.3	3.5	3.3
Non-metallic mineral products	670	0.7	1 876	2.1	-5.7	-2.4	6.0
Metals and metal products	7 415	7.9	7 299	8.1	-4.1	-5.6	2.8
Machinery and electronics	24 809	26.6	17 980	20.0	-3.5	-1.3	7.5
Vehicles	1 805	1.9	8 392	9.3	-9.7	-15.3	12.4
Precision instruments; clocks and watches, jewellery	20 496	22.0	11 322	12.6	-5.7	9.2	7.3
Other miscellaneous goods	3 039	3.3	4 204	4.7	-2.4	-11.1	8.2
Total	**93 289**	**100.0**	**89 830**	**100.0**	**-2.8**	**-2.7**	**4.5**
Purpose							
Raw materials, semi-manufactures	30 270	32.4	31 140	34.7	-2.5	-0.9	1.8
Energy sources	116	0.1	3 440	3.8	-10.6	-11.7	-6.6
Capital goods	30 080	32.2	21 211	23.6	-6.4	-5.5	12.2
Machinery and equipment	27 441	29.4	17 266	19.2	-2.4	-3.1	9.9
Commercial vehicles	1 370	1.5	2 198	2.4	-25.4	-20.7	9.2
Consumer goods	32 824	35.2	34 039	37.9	0.3	-1.5	6.7
Food, beverages and tobacco	2 346	2.5	4 333	4.8	-1.3	-1.1	1.8
Other, non durable goods	15 889	17.0	13 570	15.1	4.9	4.2	7.2
Durables	14 476	15.5	15 923	17.1	-2.7	-6.1	7.7
Total	**93 289**	**100.0**	**89 830**	**100.0**	**-2.8**	**-2.7**	**4.5**

Source: Die Volkswirtschaft 1989-1994; Federal Economic Department.

Table CH16: Wholesale trade price indexes, Switzerland (1985 - 1993)

Principal groups	Wholesale trade prices indexes			
	Weight (%)	Growth (%)		Average annual growth rate (%)
		1992/91	1993/92	1991/85
Agricultural products	16.0	-3.4	-2.3	0.1
Energy sources raw materials and consumables	9.0	-0.2	5.2	-2.0
Food products, beverages and tobacco	15.6	0.9	1.6	1.3
Textiles	11.7	-1.4	-3.1	-0.5
Wood and cork	5.8	1.6	0.4	2.0
Paper and paper products	4.4	-2.1	-6.5	0.2
Hides, skins, rubber, synthetics	5.1	2.2	-2.1	1.0
Chemicals and related products	14.1	0.1	0.9	-0.3
Construction materials, ceramics and glass	4.2	4.3	1.9	4.0
Metals and metallic products	14.3	1.3	-2.0	0.8
Total	**100.0**	**0.1**	**-0.1**	**0.4**
Raw materials and intermediates	61.4	-0.4	-1.4	0.2
for agriculture	1.9	0.6	0.0	0.4
for foods and luxury products	9.1	-5.1	0.4	-1.1
for other industries and building	50.4	0.3	-1.8	0.5
Energy sources and raw materials and consumables	9.0	-0.2	5.2	-2.0
Consumer goods	29.6	1.2	0.2	1.7
Total	**100.0**	**0.1**	**-0.1**	**0.4**
Domestic products	70.6	0.7	0.3	1.2
Imported products	29.4	-1.7	-1.3	-1.5
Total	**100.0**	**0.1**	**-0.1**	**0.4**
Consumer price trend		**4.0**	**3.3**	**3.1**
Real evolution of the swiss franc weighted by exports [1]		**-1.1**	**3.4**	**1.4**

[1] Using the exchange rate of the first 15 major export destination countries.
Source: Wholesale trade price index; National Index, Bundesamt für Statistik.
Schweizerische Nationalbank SNB.

ANNEXES

DISTRIBUTIVE TRADES

Three main categories of commercial enterprise can be distinguished: wholesale trade, retail trade and commission trade.

1. Wholesale trade

Form of trade in which goods are purchased and stored in large quantities and sold, in batches of a designated quantity, to resellers, professional users or groups, but not to final consumers. D.C.

2. Retail trade

Form of trade in which goods are mainly purchased and resold to the consumer or end-user, generally in small quantities and in the state in which they were purchased (or following minor transformations). D.C.

3. Commission trade

Individuals or companies who bring together a seller and a buyer without themselves acquiring ownership of the goods and who are remunerated other than through a wage or salary. Commission trade (e.g. brokers, commercial representatives, negotiators) are also known as trade 'intermediaries'. Commercial representatives are individuals who regularly and independently, without being bound by a service contract, negotiate and in some cases conclude agreements in respect of purchases, sales, rentals or the provision of services in the name and on behalf of the producers and traders for whom they act. The profession of commercial representative is often regulated by specific laws and conventions. D.C.

STATISTICAL UNITS

The choice of statistical unit is determined by the type of data being collected. It has a direct influence on the significance of the results and hence on the ways in which they can be used. C.R.

1. Enterprise

The enterprise is the smallest combination of legal units that is an organisational unit producing goods or services, which benefits from a certain degree of autonomy in decision-making, especially for the allocation of its current resources. An enterprise carries out one or more activities at one or more locations. An enterprise may be a sole legal unit. C.R.

2. Local unit

The local unit is an enterprise or part thereof (e.g. a workshop, factory, warehouse, office, mine or depot) situated in a geographically identified place. At or from this place economic activity is carried out for which — save for certain exceptions — one or more persons work (even if only part-time) for one and the same enterprise. C.R.

3. Establishment

An establishment is defined by the System of National Accounts (SNA) as an enterprise, or part of an enterprise, that is situated in a single location and in which only a single (non-ancillary) productive activity is carried out or in which the principal productive activity accounts for most of the value added.

According to the Regulation on statistical units and the European System of Accounts (ESA) the local kind-of-activity unit (local KAU) corresponds to the operational definition of the establishment. G.B.S.

WHOLESALE SALES FORMATS

1. Cash and carry (C&C)

Form of trade in which goods are sold from a wholesale warehouse operated either on a self-service basis, or on the basis of samples (with the customer selecting from specimen articles using a manual or computerised ordering system but not serving himself) or a combination of the two. Customers (retailers, professional users, caterers, tradesmen, institutional buyers, etc.) settle the invoice on the spot and in cash, and carry the goods away themselves. D.C.

AFFILIATIONS AND CO-OPERATION

1. Affiliation to a voluntary chain

Grouping of one or more wholesalers and retailers, generally under a common sign or logo, in which each of the partners remains independent and which aims to organise certain services in such a way as to increase the commercial potential of its members and facilitate the management of their activities. W.P.

EMPLOYMENT

1. Persons employed

Persons employed are defined as persons who work in the observation unit (inclusive of working proprietors, partners working regularly in the unit and unpaid family workers), as well as persons who work outside the unit who belong to it and are paid by it (e.g. sales representatives, delivery personnel, repair and maintenance teams). G.B.S.

2. Employees

The term 'employees' is applied to workers employed in the enterprise who have a contract of employment and whose pay depends on the amount of time worked or work performed. The number of employees equals the total number of persons engaged minus the number of proprietors and family workers. It therefore includes manual workers, salaried staff, and persons who work outside the unit but who belong to it and are paid by it (e.g. commercial representatives, delivery drivers, repair and maintenance teams). Included are persons absent for short periods (e.g. sick leave, paid leave, special leave) and also those on strike, but not those absent for an indefinite period. Also included are part-time workers (half-time or reduced-time) who are regarded as such under the laws of the country concerned and who are on the payroll, as well as seasonal workers and apprentices. Home workers (unless included on the enterprise's payroll), labour made available to the unit by other enterprises and charged for, persons carrying out repair and maintenance work in the unit in question on behalf of other enterprises, and persons doing their military service are not included. E.S.

3. Self employed

This category comprises all proprietors of enterprises — whether sole proprietors or partners — who play an active part in the activity of the unit in question, but excludes partners or proprietors whose principal activity is not carried on regularly in the unit. Shareholders, even if they are majority shareholders, or members of a company with limited liability who work in the unit and are paid for their work are not classified under this heading but are included under employees. E.S.

4. Family workers

This category includes all persons who live with the proprietor of an enterprise and who work regularly in the enterprise, but do not have a contract of service and do not receive a fixed sum for the work they perform. The term 'family worker' is applied only to those persons who work regularly in a family business. E.S.

5. Part-time employees

Part-time employees are generally taken to be persons whose usual hours of work are less than the normal working hours. This definition encompasses all forms of part-time work (half-day work, work for one, two or three days a week, etc.). It should be noted that whereas the 'full-time employee' category is relatively homogeneous, the same cannot be said of

the 'part-time employee' category since this can cover anything between 20% or even less and 80% or more of the normal working hours of the employing unit. It is impossible to establish an exact distinction between part-time and full-time work due to variations in working practices between Member States and industries. Part-time employees (duration of work less than the norm) and intermittent/seasonal employees (who may work full-time but for a short period, e.g. temporary workers, film crew etc.) should not be confused.
G.B.S.

6. Man-years employment

Man-years employment corresponds to the total hours worked in a year divided by the average number of hours normally worked in full-time full-year jobs. The length of a full-time full-year job may vary over time and between industries and countries. E.S.

PERSONNEL COSTS

Personnel costs are defined as the total remuneration, in cash or in kind, payable by an employer to an employee (regular and temporary employees as well as home workers) in return for work done by the latter during the reference period. Personnel costs also include taxes and employees' social security contributions retained by the unit as well as the employer's compulsory and voluntary social contributions.

Personnel costs are made up of:

- Wages and salaries
- Employers' social security costs.

G.B.S.

WAGES AND SALARIES

Wages and salaries are defined as the total remuneration, in cash or in kind, payable to all persons counted on the payroll (including homeworkers), in return for work done during the accounting period, regardless of whether it is paid on the basis of working time, output or piecework and whether it is paid regularly or not.

Wages and salaries include the values of any social contributions, income taxes, etc. payable by the employee even if they are actually withheld by the employer and paid directly to social insurance schemes, tax authorities, etc. on behalf of the employee. Wages and salaries do not include social contributions payable by the employer.

Wages and salaries include: all gratuities, bonuses, ex-gratia payments, 'thirteenth month payments', severance payments, lodging, transport, cost-of-living, and family allowances, tips, commission, attendance fees, etc. received by employees, as well as taxes, social security contributions and other amounts payable by employees and withheld at source by the employer. Wages and salaries which the employer continues to pay in the event of illness, occupational accident, maternity leave or short-time working may be recorded here or under social security costs, dependent upon the unit's accounting practices. G.B.S.

TURNOVER

Turnover comprises the totals invoiced by the observation unit during the reference period, and this corresponds to market sales of goods or services supplied to third parties. These sales may be included in accounts under the headings 'Net turnover' or 'Other operating income'.

The elements accounted for as 'Other operating income' which should be considered here as turnover include income from concessions, patents, trademarks and similar values.

Turnover includes all duties and taxes on goods and services invoiced by the unit with the exception of VAT invoiced by the unit vis-à-vis its customer and other taxes directly linked to turnover. It also includes all other charges (transport, packaging, etc.) passed on to the customer, even if these charges are listed separately in the invoice. Reduction in prices, rebates and discounts as well as the value of returned packing must be deducted, but not cash discounts.

Turnover includes only ordinary activities and hence excludes the sales of fixed assets. Operating subsidies received from public authorities or the institutions of the European Union are also excluded.

For the financial sectors, turnover needs to be defined in a different manner. G.B.S.

PURCHASES OF GOODS FOR RESALE IN THE SAME CONDITION AS RECEIVED

Purchases for resale are purchases of goods for resale to third parties without further processing. The value of goods which are sold to third parties on a commission basis is excluded, since these goods are neither bought nor sold by the agent receiving the commission.

By determining purchases and changes in stocks of goods for resale in the same condition as received, it is possible to establish the production value. This is a more useful variable than turnover for making comparisons between industrial sectors and production units. G.B.S.

PRODUCTION

Production is an activity carried out under the control and responsibility of an institutional unit that uses inputs of labour, capital and goods and services to produce goods and services.

1. Production value

The production value measures the amount actually produced by the unit, based on sales, changes in stocks and the resale of goods and services.
The production value is defined as turnover, plus or minus the changes in stocks of finished products, work in progress and goods and services purchased for resale, minus the purchases of goods and services for resale, plus capitalised production.

In order to establish the production value, it is necessary to subtract in each case 'purchases for resale' specific to each activity, In this way the production value, which includes the provision of services, the profit margin and the production of goods in the classical sense of the term, is obtained. The production value cannot be aggregated since it includes intermediate consumption (unlike value added), but it enables significant comparisons to be made between each activity and each enterprise. From this stage onwards standard techniques can be used to determine value added, gross operating surplus, etc.

Production value is defined as follows:

	Turnover
-	Purchases of goods purchased for resale in the same condition as received
+/-	Change in stocks of finished products and work in progress manufactured by the unit
+/-	Change in stocks of goods purchased for resale in the same condition as received
+	Capitalised production
=	Production value.

Production value is used in the calculation of value added at basic prices and other aggregates and balances. G.B.S.

MARGIN

Difference between the selling or transfer price of a good or service and its cost price. The trading margin (sometimes wrongly referred to as 'profit margin') is defined in relation to the cost of acquisition only. In all cases a distinction is made between 'gross' and 'net' margins. As far as the gross margin is concerned, the cost price comprises no element other than the direct cost of production or acquisition (inclusive of taxes). As regards the net margin, the cost price incorporates all or part of the enterprise's operating costs and overheads, which are applied to the product in question via rules of apportionment.

By definition, margins are expressed as absolute values; the proportional values, as percentages of the selling price or, more rarely, of the purchase price, are called 'mark-ups'. In distribution, a distinction is drawn between mark-ups as a percentage of the purchase price and mark-ups as a percentage of the selling price.

In a distribution channel which consists of several independent or self-sufficient levels, 'cumulative margins' reflect the difference between the cost price upstream of this channel and the final selling price to the consumer.

The margin is generally understood to apply to a specific product or unit of account and to a specific enterprise.

Economic and business statistics seek to determine 'average' values for the margin of a branch of activity encompassing all the enterprises marketing a particular set of products (e.g. hardware, footwear, groceries, etc.). D.C.

CONSUMPTION

That portion of disposable income (i.e. after tax) which is spent on goods and services, durable or otherwise, and which thus constitutes the difference between disposable income and savings. D.C.

1. Intermediate consumption

Intermediate consumption as consisting of the value of the goods and services consumed as inputs by a process of production, excluding fixed assets whose consumption is recorded as consumption of fixed capital. The goods and services may be either transformed or used up by the production process. E.S.A.

2. Household consumption

A term used in national accounts to refer to the value of goods and services used by households to satisfy their needs. It includes goods (food and non-food) and services, as well as goods produced for own consumption. D.C.

3. Tradable consumption

The tradable consumption of households comprises only those goods which, by their nature, are normally distributed via the retail trade. It therefore does not include services or the consumption of water, gas or electricity. E.S.

VALUE ADDED AT BASIC PRICES

Value added at basic prices is calculated as follows:

Turnover
- Purchases of goods and services
+/- Change in stocks of goods and services
+ Capitalised production
+ Operating subsidies linked to products

= Value added at basic prices. G.B.S.

VALUE ADDED AT FACTOR COST

Value added at factor cost is calculated as follows:

Value added at basic prices
+ Operating subsidies linked to production
- Duties and taxes linked to production (other than VAT and other taxes directly linked to turnover) linked to production

= Value added at factor cost.

Value added at factor cost is used in the calculation of 'Gross operating surplus' and other aggregates and balances. G.B.S.

VALUE ADDED AT MARKET PRICES

Value added at market prices is calculated as follows:

Value added at basic prices
- Subsidies on products
+ Taxes on products
+ VAT (only invoiced)
- VAT (on purchases)

= Value added at market prices. G.B.S.

GROSS OPERATING SURPLUS

Gross operating surplus is the surplus generated by operating activities after the labour factor input has been recompensed. It can be calculated from the value added at factor cost less the personnel costs. G.B.S.

GROSS FIXED CAPITAL FORMATION

Gross fixed capital formation as defined by the European System of Accounts (ESA) consists of resident producers' acquisitions, less disposals of fixed assets during a given period plus certain additions to the value of non-produced assets realised by the productive activity of producer or institutional units. Additions to the value of non-produced assets include major improvements to land, such as land reclamation by construction of dikes. Fixed assets are tangible or intangible assets produced as outputs from processes of production that are themselves used repeatedly, or continuously, in processes of production for more than one year. G.B.S.

GROSS INVESTMENT IN TANGIBLE GOODS

Gross investment in tangible goods includes investment during the reference period in all tangible goods. Included are new and existing tangible capital goods, whether bought from third parties or produced for own use (i.e. Capitalised production of tangible capital goods), having a useful life of more than one year including non-produced tangible goods such as land.
All investments are valued prior to (i.e. gross of) value adjustments, and before the deduction of income from disposals. Purchased goods are valued at purchase price, i.e. transport and installation charges, fees, taxes and other costs of ownership transfer are included. Own produced tangible goods are valued at production costs. Where large investments are made with expenditure taking place over more than one reference period, the expenditure should be recorded as investment in the reference period in which the expenditure is incurred. Goods acquired through mergers are excluded. Purchases of small tools which are not capitalised are included under current expenditure.

Also included are all additions, alterations, improvements and renovations which prolong the service life or increase the productive capacity of the capital goods.

Current maintenance costs are excluded as is the value and current expenditure on capital goods used under rental and lease contracts. Investment in intangible and financial assets are excluded.

Gross investment in tangible goods may be broken down as follows:
- land,
- existing buildings and structures,
- construction or alteration of buildings and other real estate: this covers expenditure relating to the reference year on the construction or conversion of buildings, as well as all maintenance costs for buildings and other real property which the enterprise owns or rents, excluding current maintenance costs,
- transport equipment for use off the premises (vehicle pool): this includes all vehicles and boats used off the premises, i.e. motor cars, commercial vehicles and lorries as well as special vehicles of all types, boats, railway wagons, etc.,
- plant and equipment: this covers machinery (office machines, etc.), special vehicles used on the premises, other machinery and equipment. G.B.S.

EXTRA-EU EXPORTS OF GOODS AND SERVICES

The European System of Accounts (ESA) 1995 defines exports of goods and services as consisting of all transactions (sales, barter, gifts or grants) from residents situated within the economic territory of the EU to non-residents situated outside the economic territory of the EU. G.B.S.

EXTRA-COMMUNITY IMPORTS OF GOODS AND SERVICES

Imports of extra-community goods covers the purchases of goods produced outside the territory of the European Union by a resident situated within the national territory of a Member State of the EU. Goods which are produced outside the territory of the EU and are resold to other EU residents are not included under this heading. In the latter case, such purchases would be classified as being intra-EU deliveries. Goods which are produced within the territory of the EU and exported to non-EU countries to be then re-imported into the EU are included under this heading. For services it covers the provisions of services within the national territory by a provider operating outside the territory of the European Union. G.B.S.

INTRA-COMMUNITY ACQUISITIONS OF GOODS AND SERVICES

Intra-community acquisitions of goods covers the purchases of goods produced within the territory of the European Union by a resident of another Member State of the EU. Intra-community acquisitions of goods and services refers to the modified 6th VAT Directive. For services it covers the provisions of services within the national territory by a provider operating in another Member State.

It is useful to know the overall amount of imports of an enterprise (or of an industry or sub-industry) even if it is not broken down by product, since it allows one to gauge the degree of internationalisation which enterprises bring to the purchasing of products for resale or the purchasing of goods and services for ongoing operational purposes. It should be noted that the definition of imports includes imports of capital goods, although in general these can be expected to be small in relation to total current purchases. G.B.S.

LEGAL STATUS

1. Sole proprietorship

Enterprise owned exclusively by one natural person. A.D.D.T.

2. Partnership

Association of persons who conduct a business under a collective name. It usually takes the form of a limited partnership. A.D.D.T.

3. Limited liability companies

Enterprises comprising the joint-stock company, the limited partnership with share capital and the private limited company (plc). Harmonised rules at European level governing this group of companies are laid down by the fourth Directive of 25 July 1978. A.D.D.T.

4. Co-operative societies

Bodies corresponding to the set of laws which in each country define the legal status of co-operation. They may be constituted in any one of the legal forms named above. They observe a number of general principles, for example they are only entitled to provide their services to members, profits are distributed in proportion to members' dealings with the society, etc. A.D.D.T.

5. Enterprises with other forms of legal constitution

Nationalised industries, publicly-owned enterprises, State or local-authority monopolies. A.D.D.T.

SOURCES OF DEFINITIONS

The above definitions have been drawn from a number of sources, which are identified by the following initials:

ADDT: Annex to the draft Council Directive on Community surveys in the field of distributive trade, Eurostat, Luxembourg (1992).

DC: *Dictionnaire Commercial* compiled by the *Académie des Sciences Commerciales de Paris* and published by the *Conseil International de la Langue Française* and *l'Entreprise Moderne d'Edition* (1987).

CR: Council Regulation (EEC) No 696/93 of 15 March 1993 on statistical units for the observation and analysis of the production system (OJ No L7671, 30.3.1993).

ES: Eurostat, Unit D2, 'Distributive trades, Services'.

GBS: Glossary of Business Statistics, Eurostat, Unit D2, 'Distributive trades, Services', January 1997.

WP: Working Party set up on the initiative of the EC Commission's Directorate-General XXIII, Brussels, Belgium (1991).

NACE Rev. 1

Council Regulation (EEC) No 3037/90 of 9 October 1990 on the statistical classification of economic activities in the European Community (NACE Rev. 1)

Section G: Wholesale and retail trade; repair of motor vehicles, motor cycles and personal and household goods

50 Sale, maintenance and repair of motor vehicles and motor cycles; retail sale of automotive fuel

50.1 Sale of motor vehicles
50.10 Sale of motor vehicles

50.2 Maintenance and repair of motor vehicles
50.20 Maintenance and repair of motor vehicles

50.3 Sale of motor vehicle parts and accessories
50.30 Sale of motor vehicle parts and accessories

50.4 Sale, maintenance and repair of motorcycles and related parts and accessories
50.40 Sale, maintenance and repair of motorcycles and related parts and accessories

50.5 Retail sale of automotive fuel
50.50 Retail sale of automotive fuel

51 Wholesale trade and commission trade except of motor vehicles and motor cycles

51.1 Wholesale on a fee and contract basis
51.11 Agents involved in the sale of agricultural raw materials, live animals, textile raw materials and semi-finished goods
51.12 Agents involved in the sale of fuels, ores, metals and industrial chemicals
51.13 Agents involved in the sale of timber and building materials
51.14 Agents involved in the sale of machinery, industrial equipment, ships and aircraft
51.15 Agents involved in the sale of furniture, household goods, hardware and ironmongery
51.16 Agents involved in the sale of textiles, clothing, footwear and leather goods
51.17 Agents involved in the sale of food, beverages and tobacco
51.18 Agents specializing in the sale of particular products or ranges of products nes
51.19 Agents involved in the sale of a variety of goods nes

51.2 Wholesale of agricultural raw materials and live animals
51.21 Wholesale of grain seeds and animal feeds
51.22 Wholesale of flowers and plants
51.23 Wholesale of live animals
51.24 Wholesale of hides, skins and leather
51.25 Wholesale of unmanufactured tobacco

51.3 Wholesale of food, beverages and tobacco
51.31 Wholesale of fruit and vegetables
51.32 Wholesale of meat and meat products
51.33 Wholesale of dairy produce, eggs and edible oils and fats
51.34 Wholesale of alcoholic and other beverages
51.35 Wholesale of tobacco products
51.36 Wholesale of sugar and chocolate and sugar confectionery
51.37 Wholesale of coffee, tea, cocoa and spices
51.38 Non-specialized wholesale of food, beverages and tobacco
51.39 Wholesale distribution of other food including fish, crustaceans and molluscs

51.4 Wholesale of household goods
51.41 Wholesale of textiles
51.42 Wholesale of clothing and footwear
51.43 Wholesale of household appliances and radio and television goods
51.44 Wholesale of china and glassware, varnish, paint, wallpaper and cleaning materials
51.45 Wholesale of perfume and cosmetics
51.46 Wholesale of pharmaceutical goods
51.47 Wholesale of other household goods

51.5 Wholesale of non-agricultural intermediate products, waste and scrap
51.51 Wholesale of solid, liquid and gaseous fuels and related products
51.52 Wholesale of metals and metal ores
51.53 Wholesale of wood and of construction materials
51.54 Wholesale of hardware, plumbing and heating equipment and supplies
51.55 Wholesale of chemical products
51.56 Wholesale of other intermediate products
51.57 Wholesale of waste and scrap

51.6 Wholesale of machinery, equipment and supplies
51.61 Wholesale of machine tools for working metal and wood
51.62 Wholesale of construction machinery
51.63 Wholesale of machinery for the textile industry and of sewing and knitting machines
51.64 Wholesale of office machinery and equipment
51.65 Wholesale of other machinery for use in industry, trade and navigation
51.66 Wholesale of agricultural machinery and accessories and implements, including tractors

51.7 Other wholesale
51.70 Other wholesale

52 Retail trade, except of motor vehicles and motorcycles; repair of personal and household goods

52.1 Retail sale in non-specialized stores
52.11 Retail sale in non-specialized stores with food, beverages and tobacco predominating
52.12 Other retail sale in non-specialized stores

52.2 Retail sale of food, beverages and tobacco in specialized stores

52.21 Retail sale of fruit and vegetables
52.22 Retail sale of meat and meat products
52.23 Retail sale of fish, crustaceans and molluscs
52.24 Retail sale of bread, cakes, flour confectionery and sugar confectionery
52.25 Retail sale of alcoholic and other beverages
52.27 Other retail sale of food, beverages and tobacco in specialized stores

52.3 Retail sale of pharmaceutical and medical goods, cosmetic and toilet articles

52.31 Dispensing chemists
52.32 Retail sale of medical and orthopaedic goods
52.33 Retail sale of cosmetic and toilet articles

52.4 Other retail sale of new goods in specialized stores

52.41 Retail sale of textiles
52.42 Retail sale of clothing
52.43 Retail sale of footwear and leather goods
52.44 Retail sale of furniture and lighting equipment
52.45 Retail sale of household appliances and radio and television goods
52.46 Retail sale of hardware, paints and glass
52.47 Retail sale of books, newspapers and stationery
52.48 Other retail sale in specialized stores

52.5 Retail sale of second-hand goods in stores

52.50 Retail sale of second-hand goods in stores

52.6 Retail sale not in stores

52.61 Retail sale via mail-order houses
52.62 Retail sale via stalls and markets
52.63 Other non-store retail sale

52.7 Repair of personal and household goods

52.71 Repair of boots, shoes and other articles of leather
52.72 Repair of electrical household goods
52.73 Repair of watches, clocks and jewellery
52.74 Repair nes

SYMBOLS AND ABBREVIATIONS

1. Countries and regions

EC	European Communities
EEC	European Economic Community
EU	European Union
EUR 15	All Member States EU
B	Belgique/België
DK	Danmark
D	Deutschland
EL	Elláda
E	España
F	France
IRL	Ireland
I	Italia
L	Luxembourg
NL	Nederland
A	Österreich
P	Portugal
FIN	Suomi/Finland
S	Sverige
UK	United Kingdom
EFTA	European Free Trade Association
IS	Iceland
NO	Norway
EEA	European Economic Area (EUR 15 + Iceland, Norway)
CH	Switzerland

2. Currencies

ECU	European currency unit
BEF	Belgian franc
DKK	Danish crown
DEM	German mark
GRD	Greek drachma
ESP	Spanish peseta
FRF	French franc
IEP	Irish pound (punt)
ITL	Italian lira
LUF	Luxembourg franc
NLG	Dutch guilder
ATS	Austrian schilling
PTE	Portuguese escudo
FIM	Finnish markka
SEK	Swedish crown
GBP	Pound sterling
ISK	Iceland crown
NOK	Norwegian crown
CHF	Swiss franc

3. Statistical Offices

Eurostat	Statistical Office of the EC
ACSO	Austrian Central Statistical Office (A)
CBS	Central Bureau of Statistics (NL)
CSO	Central Statistical Office (IRL)
CSO	Central Statistical Office (UK)
DS	Danmarks Statistik (DK)
INE	Instituto Nacional de Estatística (E)
INSEE	Institut National de la Statistique et des Etudes Economiques (F)
ISTAT	Istituto Nazionale di Statistica (I)
SF	Statistics Finland (SF)
STABU	Statistisches Bundesamt (D)
Statec	Service Central de la Statistique et des Etudes Economiques (L)

4. Other abbreviations

bn	billion (= thousand million)
C	confidential data
C&C	cash-and-carry
ESA	european system of integrated economic accounts (Eurostat)
GDP	gross domestic product
GNP	gross national product
GP	gross production
Mio	million
NACE	general industrial classification of economic activities within the European Communities
NSO	national statistical offices
PPP	purchasing power parities
PPS	purchasing power standards
VAT	value-added tax
:	data not available
0.0	very low value

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The objectiveof this publication is to describe the wholesale trade sector in the European Economic Area. It contains a synthesis chapter with a combination of comprehensive data with an up-to-date analysis of the statistics and developments, and 16 national chapters in which two main themes, the enterprise and employment, are given detailed attention. The study completes a series on commerce with publications on retail trade which were published in 1994, 1995 and now together with this publication.

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