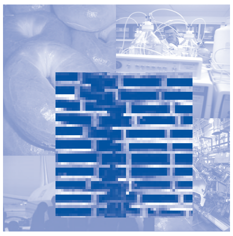
Wholesale trade



The wholesaling activity consists of selling to retailers or to industrial, commercial, institutional and professional users. Wholesalers can act on a fee or contract basis as agents (which are covered in Subchapter 17.1) or for their own-account, buying and selling goods (as covered by Subchapters 17.2 to 17.6). The own-account wholesale subchapters distinguish the types of product in which the wholesaler is specialised: agricultural products, consumer goods, intermediate goods, machinery and equipment (as covered by Subchapters 17.2 to 17.5), while specialised wholesalers of other products are included in the final subchapter (Subchapter 17.6) along with non-specialised wholesalers.

In the supply chain, wholesalers are located between producers and users, providing know-how and knowledge in markets for which they have expertise. Competition within the wholesale trade activity is often centred on providing more efficient or more sophisticated value added services. Wholesalers can provide a range of services from basic storage and break of bulk, sorting, grading and logistics to pre- and post-production operations.

STRUCTURAL PROFILE

Value added in the EU-25's wholesale trade sector (NACE Division 51) was EUR 423.8 billion in 2003, 45.5 % of the value added generated within the whole of distributive trades (NACE Section G), and 16.0 % of the total for non-financial services (NACE Sections G to I and K). There were 8.8 million persons employed in the EU-25's wholesale trade sector in 2003, which equated to 30.7 % of the EU-25's total distributive trades workforce and 12.7 % of the non-financial services workforce. As such, this sector's contribution to distributive trades and non-financial services was much higher in value added terms than in employment terms.

Among the activities that compose the wholesale trade sector, own-account wholesale trade (NACE Groups 51.2 to 51.9) accounted for 91.6 % of the EU-25's wholesale trade value added in 2003, and wholesale on a fee or contract basis (NACE Group 51.1) for the remainder. The largest wholesale trade subsector in value added and employment terms was the wholesale trade of consumer goods (NACE Groups 51.3 and 51.4) - see Figure 17.1 - followed by the wholesale of non-agricultural intermediate products, waste and scrap (NACE Group 51.5) and machinery, equipment and supplies (NACE Group 51.8), both of which made a larger contribution to sectoral value added than employment.

The activities in NACE Division 51 cover all wholesale trade except that concerning motor trade (see the previous chapter). This chapter covers resale (sale without transformation) of new and used products, as well as wholesale activities carried out on a fee or contract basis.

NACE

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

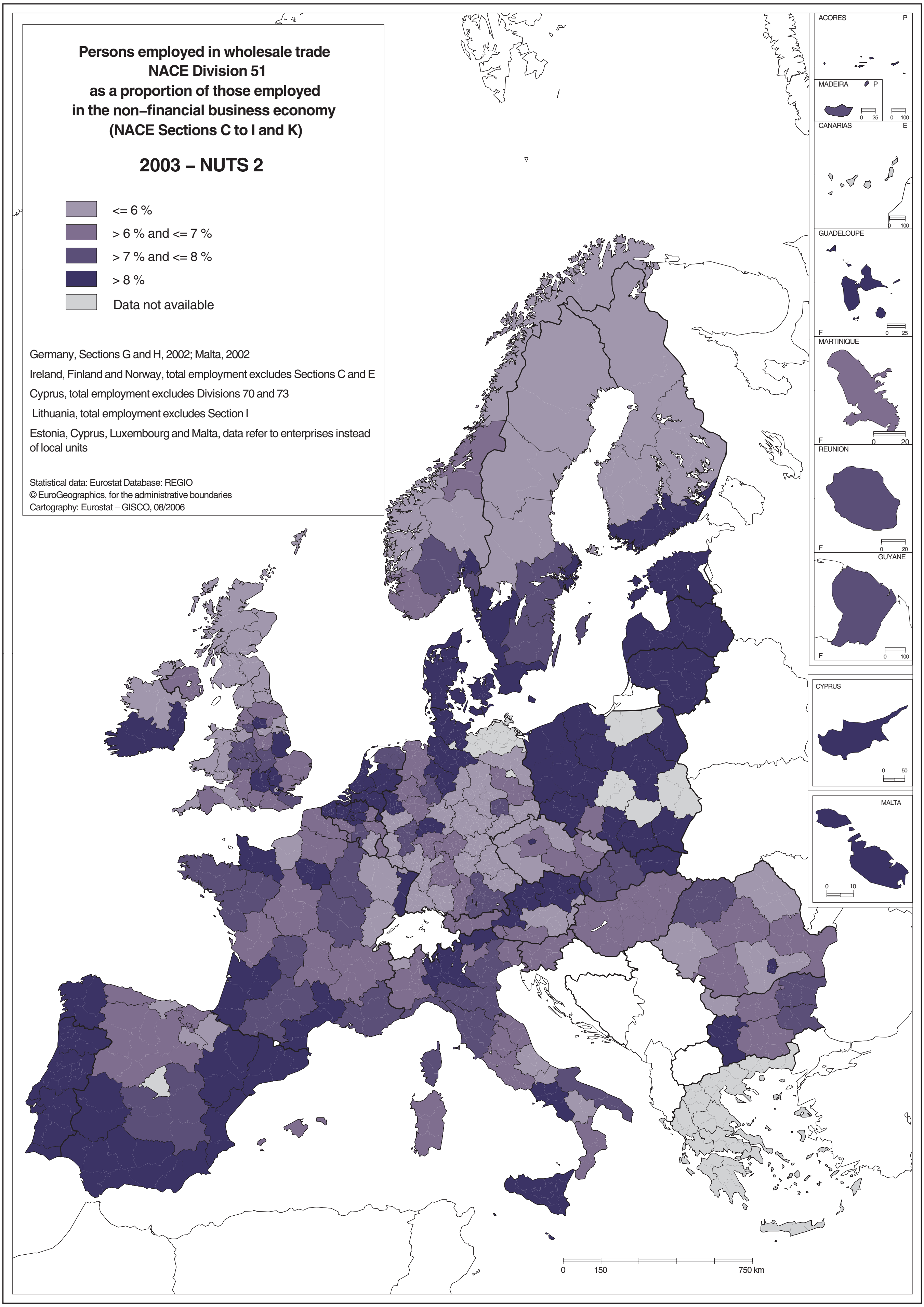

Persons employed in wholesale trade
NACE Division 51
as a proportion of those employed
in the non–financial business economy
(NACE Sections C to I and K)
2003 – NUTS 2
<= 6 %
> 6 % and <= 7 %
> 7 % and <= 8 %
> 8 %
Data not available
Germany, Sections G and H, 2002; Malta, 2002
Ireland, Finland and Norway, total employment excludes Sections C and E
Cyprus, total employment excludes Divisions 70 and 73
Lithuania, total employment excludes Section I
Estonia, Cyprus, Luxembourg and Malta, data refer to enterprises instead of local units
Statistical data: Eurostat Database: REGIO
© EuroGeographics, for the administrative boundaries
Cartography: Eurostat – GISCO, 08/2006
ACORES
MADEIRA
CANARIAS
GUADELOUPE
MARTINIQUE
REUNION
GUYANE
CYPRUS
MALTA
0 150 750 km

Table 17.1

Wholesale trade and commission trade (NACE Division 51)
Structural profile, EU-25, 2003

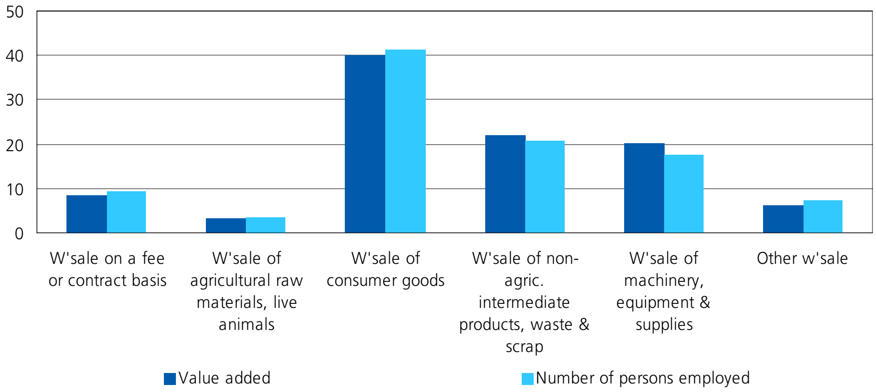
	Turnover (EUR million)	Value added (EUR million)	Share of non-financial services value added (%)	Number of persons employed (thousands)	Share of non-financial services employment (%)
Wholesale trade and commission trade	3 585 010	423 792	16.0	8 788	12.7
Wholesale on a fee or contract basis	185 971	35 568	1.3	832	1.2
Wholesale of agricultural raw materials, live animals	174 961	13 645	0.5	320	0.5
Wholesale of consumer goods	1 446 718	170 195	6.4	3 626	5.3
Wholesale of food, beverages and tobacco	693 709	62 792	2.4	1 627	2.4
Wholesale of household goods	753 009	107 403	4.1	1 999	2.9
Wholesale of non-agricultural intermediate products, waste and scrap	1 044 642	93 206	3.5	1 820	2.6
Wholesale of machinery, equipment and supplies	553 235	85 474	3.2	1 537	2.2
Other wholesale	179 482	25 705	1.0	654	1.0

Source: Eurostat (SBS)

Own-account wholesale trade generated EUR 3 399 billion of turnover in the EU-25 in 2003 - Figure 17.2 shows an activity breakdown. The wholesaling of consumer goods was the largest activity and accounted for 64.8 % of own-account wholesale turnover in Malta (2002), and also exceeded 50 % in Portugal, Cyprus and Spain, while the average share of consumer goods wholesaling for the EU-25 was 42.6 %. The wholesale of non-agricultural intermediate products, waste and scrap was the second largest of the own-account wholesale trade subsectors in three quarters of the Member States with data available, averaging 30.7 % of own-account wholesale trade turnover in the EU-25. The importance of the wholesale trade of machinery, equipment and supplies varied greatly between Member States, from just 3.7 % in Poland to 28.8 % in the Netherlands. The wholesale trade of agricultural raw materials and live animals (NACE Group 51.2) accounted for one tenth of own-account wholesale trade turnover in France (10.1 %), nearly double the EU-25 average (5.1 %). Other wholesale trade (NACE Group 51.9) accounted for 5.3 % of own-account wholesale trade turnover in the EU-25, although this share rose to more than one quarter of the total in Slovenia and Slovakia and exceeded one third in Poland.

Figure 17.1

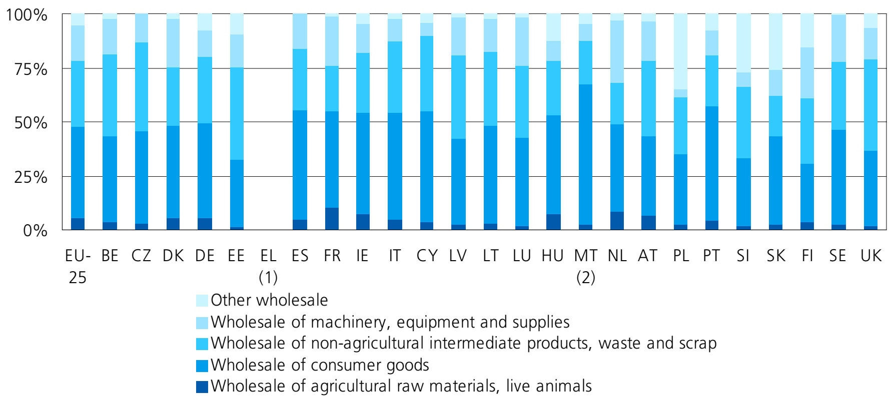
Wholesale trade and commission trade (NACE Division 51)
Breakdown of sectoral value added and employment, EU-25, 2003 (%)



Source: Eurostat (SBS)

Figure 17.2

Wholesale trade (NACE Groups 51.2 to 51.9)
Breakdown of own account wholesale turnover, 2003 (%)



(1) Not available.
(2) 2002.
Source: Eurostat (SBS)

Table 17.2

Wholesale trade and commission trade (NACE Division 51)
Turnover, value added and employment: ranking of the top 5 Member States, 2003

Rank	Highest turnover (EUR million) (1)	Share in EU-25 turnover (%) (1)	Highest value added (EUR million) (1)	Share in EU-25 value added (%) (1)	Highest number of persons employed (thousands) (1)	Share in EU-25 employment (%) (1)	Highest share of national non-financial services value added (%) (2)	Highest share of national non-financial services employment (%) (2)
1	Germany (633 122.5)	17.7	Germany (81 046.3)	19.1	Germany (1 228.2)	14.0	Slovakia (24.7)	Slovakia (21.0)
2	United Kingdom (605 487.6)	16.9	United Kingdom (72 403.3)	17.1	United Kingdom (1 196.4)	13.6	Poland (24.3)	Estonia (18.6)
3	France (554 852.2)	15.5	France (58 741.8)	13.9	Spain (1 073.3)	12.2	Latvia (23.8)	Portugal (17.9)
4	Italy (366 276.2)	10.2	Italy (47 152.4)	11.1	Italy (1 067.5)	12.1	Portugal (23.3)	Slovenia (17.1)
5	Spain (323 513.4)	9.0	Spain (40 192.0)	9.5	France (1 039.9)	11.8	Lithuania (22.3)	Poland (16.8)

(1) Malta, 2002; Greece, not available.
(2) Lithuania and Malta, 2002; Greece and Cyprus, not available.
Source: Eurostat (SBS)

Among the Member States, Germany and the United Kingdom had the largest wholesale trade sectors in turnover, value added and employment terms - see Table 17.2. Relative to all non-financial services, Slovakia and Poland were the most specialised [1] in wholesale trade in value added terms, generating close to one quarter of their non-financial services value added in this sector in 2003.

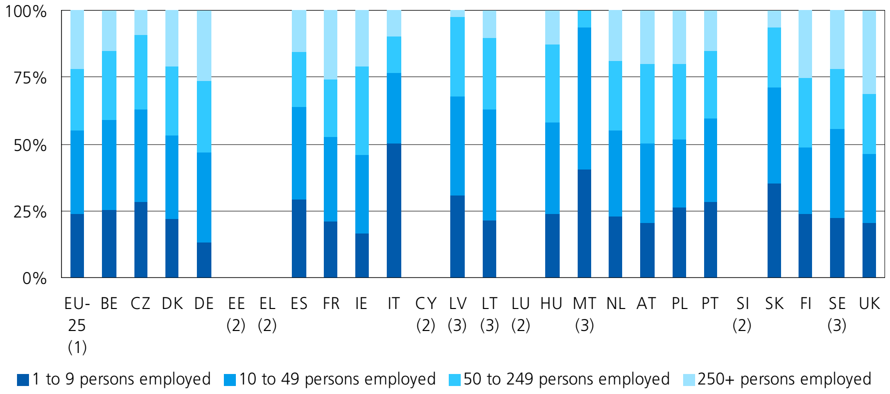
Regional employment specialisation (in some cases the whole country is treated as one region) can be seen from the map on page 284 which is based on the non-financial business economy employment share of the wholesale trade sector. Given the essential nature of many parts of wholesale trade, providing services directly to retailers and to industrial consumers, it is unsurprising that most regions tended towards the average. In the regions where the wholesale trade workforce accounted for its highest share of the non-financial business economy workforce (just over 14 % in one Dutch and one Belgian region), the relative specialisation was around five times higher than in the least specialised regions (just under 3 % in one Italian and one Finnish region); this was the second lowest ratio between highest and lowest specialisation across all of the activities shown in the maps in Chapters 1 to 23 (higher only than for retail trade and repair – see the next chapter).

The size class structure of the wholesale trade sector was quite similar to that of motor trades (NACE Division 50 - see Chapter 16), in that all four of the size classes shown in Figure 17.3 contributed between one fifth and one third of the EU-25's wholesale trade sector's value added in 2003. Small enterprises (with between 10 and 49 persons employed) accounted for more of the sector's value added than any other enterprise size class. This size class structure was in contrast to that of the retail trade and repair sector (NACE Division 52), where the vast majority of sectoral value added was generated by large enterprises (with more than 250 persons employed) or micro enterprises (with less than 10 persons employed).

Annualised short-term statistics for the EU-25's wholesale trade sector showed that the index of turnover grew by 7.3 % in 2005, and as such marked the third consecutive year that the rate of growth had increased. In 2005 the EU-25's employment index for wholesale trade also increased, up 0.9 % compared with growth of 0.2 % in 2004. Nevertheless, the level of the EU-25's employment index in 2005 was still more than 1 % below its peak of 2000, in contrast to the uninterrupted growth of the employment index for the whole of distributive trades - see Figure 17.4.

Figure 17.3

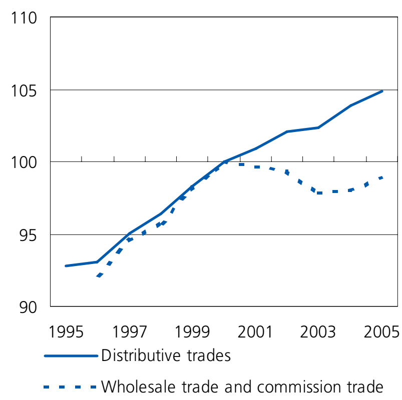
Wholesale trade and commission trade (NACE Division 51)
Share of value added by enterprise size class, 2003 (%) (1)



(1) Rounded estimates based on non-confidential data for 1 to 9 and for 10 to 49 persons employed.
(2) Not available.
(3) 2002.
Source: Eurostat (SBS)

Figure 17.4

Wholesale trade and commission trade (NACE Division 51)
Evolution of employment index, EU-25 (2000=100)



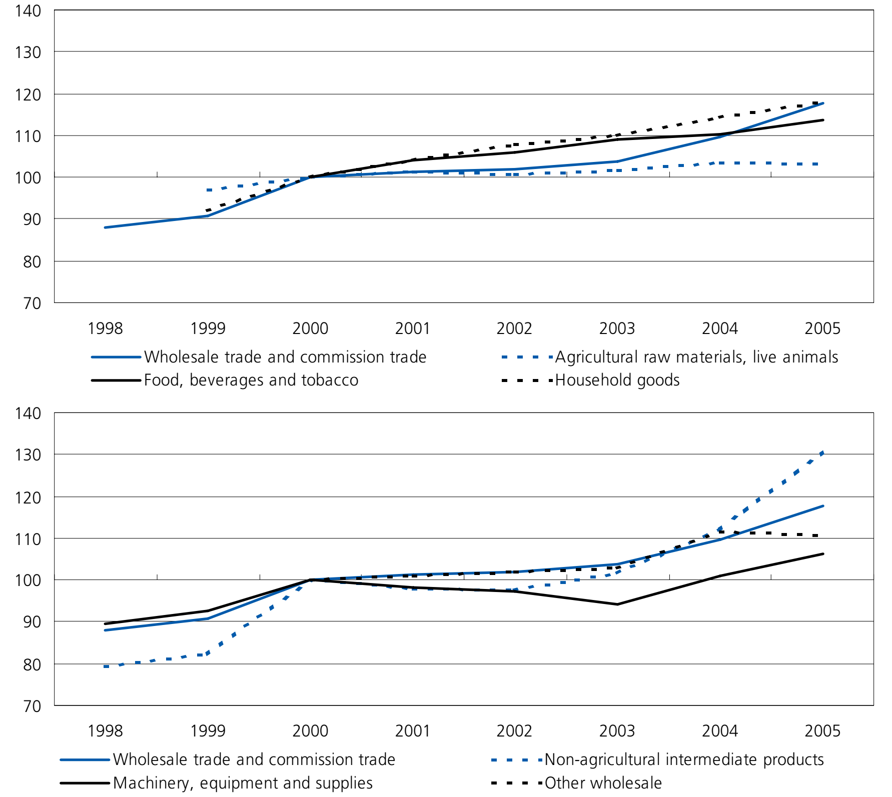
Source: Eurostat (STS)

[1] Lithuania and Malta, 2002; Greece and Cyprus, not available.

Looking at the turnover indices for the subsectors within own-account wholesale trade [2] a wide range of developments can be seen since 2000 - see Figure 17.5. After growth of 3.1 % in 2000, the EU-25's agricultural wholesaling sector maintained a relatively stable level of turnover through to 2005, with the 2004 growth rate of 1.5 % the highest rate of change (either positive or negative) during this period. The two consumer oriented activities, namely the wholesale of food, beverages and tobacco (NACE Group 51.3) and household goods (NACE Group 51.4), recorded growth in each of the years for which data are available, averaging growth of 2.6 % and 3.4 % per annum respectively between 2000 and 2005. Meanwhile, the development of the turnover index for the wholesaling of machinery, equipment and supplies, as well as the wholesaling of intermediate goods, reflected more closely the development of many industrial activities which are often the clients of these subsectors, with a fall in turnover after 2000 through to 2002 or 2003, followed by strong growth in 2004 and 2005. The fall in activity after 2000 was strongest and longest in the wholesaling of machinery, equipment and supplies. The remaining subsector, namely other wholesale trade, recorded a period of relative stagnation between 2000 and 2003 with its highest growth rate being a 1.1 % increase in 2002. Turnover then jumped 8.5 % in 2004 before declining by 0.8 % in 2005.

Figure 17.5

Wholesale trade and commission trade (NACE Division 51)
Turnover index, EU-25 (2000=100)



Source: Eurostat (STS)

LABOUR FORCE CHARACTERISTICS

According to structural business statistics the share of paid employees in total employment in the EU-25's wholesale trade sector in 2002 was 84.7 %, which was higher than the equivalent share observed for the two other distributive trade sectors. In 2003 this pattern was repeated in around three quarters of the Member States [3], the most notable exception being Estonia where the share of paid employees in wholesale trade was lower than in either of the other two distributive trades sectors.

According to Labour Force Survey data, there were some prominent differences in the employment characteristics of the wholesale trade sector when compared with the characteristics observed for the whole of distributive trades sectors or non-financial services. Men accounted for two thirds (66.5 %) of the persons employed in the EU-25's wholesale trade sector in 2005, and in none of the Member States was there a majority of women working in this sector; the nearest being Slovenia where the levels of female and male employment were almost equal. The proportion of men working in the EU-25's wholesale trade workforce was considerably higher than for retail trade and repair, but lower than in motor trades, and was 10.5 percentage points (equivalent to 18.7 %) above the non-financial services average - see Table 17.3.

In 2005 the full-time employment rate in the EU-25's wholesale trade sector (88.7 %) was also lower than in motor trades (90.5 %), higher than in retail trade and repair (69.8 %) and above the non-financial services average (79.2 %). Full-time employment rates were higher for wholesale trade than the non-financial services average in all of the Member States in 2005, although there was little difference in these rates in all the Member States that joined the EU in 2004, nor in Greece, Luxembourg or Belgium.

Of the three distributive trades sectors, wholesale trade had the smallest proportion of younger workers (aged less than 30) in its workforce, just 21.5 %, while it had the highest proportion of workers aged 30 to 49 and aged 50 or more. The proportions of the two older age groups in the wholesale trade workforce were high not just in comparison with the other distributive trades sectors, but also in comparison with the non-financial services average.

[2] Wholesale on a fee or contract basis (NACE Group 51.1), not available.
[3] Malta, 2002; Greece, not available.

Table 17.3

Wholesale trade and commission trade (NACE Division 51)
Labour force characteristics, 2005

	Male		Full-time		Breakdown by age (% share of total)		
	Proportion of those employed (%)	Index (non-financial services=100)	Proportion of those employed (%)	Index (non-financial services=100)	< 30 years	30-49 years	50+ years
EU-25	66.5	118.7	88.7	111.9	21.5	56.9	21.6
BE	64.3	109.1	82.7	105.9	20.2	59.0	20.8
CZ	58.7	107.5	96.1	102.2	25.5	53.6	20.9
DK	68.7	115.5	89.7	121.2	14.8	57.4	27.8
DE	64.3	121.6	82.6	115.6	17.8	56.0	26.2
EE	55.7	109.5	92.3	100.7	26.5	54.8	18.8
EL	67.8	111.0	98.0	102.4	25.1	59.2	15.8
ES	69.8	126.8	93.0	109.2	23.4	58.4	18.3
FR	65.0	114.2	91.5	109.1	21.0	59.7	19.3
IE	70.6	130.1	92.3	114.2	25.9	52.4	21.7
IT	70.1	116.8	90.9	108.7	17.1	62.9	20.0
CY	67.3	124.1	94.7	104.3	20.6	55.9	23.5
LV	56.3	117.8	97.1	103.1	34.8	47.7	17.5
LT	63.8	122.1	95.6	101.5	28.8	58.1	13.1
LU	68.0	117.5	89.3	105.1	15.9	60.1	24.0
HU	54.1	100.4	97.3	102.2	26.5	54.8	18.8
MT	74.7	106.6	90.8	104.9	31.1	53.3	:
NL	68.9	118.6	73.0	135.9	23.5	56.8	19.7
AT	62.9	126.1	82.2	111.4	21.6	61.4	17.0
PL	67.6	122.0	92.2	102.8	35.2	50.4	14.5
PT	67.1	121.4	97.2	104.8	23.9	54.6	21.5
SI	51.2	94.9	93.2	102.1	27.2	58.1	14.7
SK	61.7	116.8	98.1	101.1	26.8	57.4	15.8
FI	67.0	122.2	90.9	111.7	18.3	55.8	25.9
SE	71.0	116.8	87.5	113.9	17.0	54.4	28.6
UK	66.5	117.9	84.6	120.3	21.1	50.1	28.8

Source: Eurostat (LFS)

COSTS, PRODUCTIVITY AND PROFITABILITY

The level of gross tangible investment relative to operating expenditure was low in the wholesale trade sector, just 1.3 % in the EU [4]. Not only was this much lower than the non-financial services average, it was also low compared with the other two distributive trades sectors (which were both also low), less than half the level registered for retail trade and repair (2.7 %). This particularly low ratio in wholesale trade reflects the high level of operating expenditure associated with wholesale trade (and the other distributive trades as well), boosted by high expenditure on goods purchased for resale in the same condition. An analysis of operating expenditure confirms that purchases of goods and services accounted for 92.9 % of total operating expenditure in the wholesale trade sector, the same as for motor trades but higher than for retail trade and repair (87.7 %); indeed, this was the highest proportion among all non-financial services NACE divisions.

[4] EU average, 2003; Malta, 2002; excluding Greece.

Apparent labour productivity was EUR 48 200 per person employed in the EU-25's wholesale trade sector in 2003, higher than in the other distributive trades sectors and more than double the level for retail trade and repair, reflecting at least in part the higher full-time employment rate in wholesale trade. All of the wholesale trade NACE groups recorded apparent labour productivity ratios that were above the non-financial services average (EUR 38 200 per person employed), ranging from EUR 38 600 for the wholesale of food, beverages and tobacco and EUR 39 300 for other wholesale trade, up to more than EUR 50 000 per person employed for the wholesale of machinery, equipment and supplies (EUR 55 600), of household products (EUR 53 700), and of intermediate goods (EUR 51 200).

Average personnel costs in the wholesale trade sector were EUR 30 200 per employee in the EU-25 in 2002 which, as with apparent labour productivity, was higher than in the other two distributive trades sectors and also above the non-financial services average. The wage adjusted labour productivity ratio was 156.4 % in 2002, comparable with that for motor trades (156.0 %) and notably higher than for retail trade and repair (132.5 %). In 2003 the wage adjusted labour productivity of the Member States [5] ranged from 119.8 % in Sweden to 375.6 % in Latvia.

The gross operating surplus (value added minus personnel costs) in the EU-25's wholesale trade sector was equivalent to 5.4 % of turnover in 2002, lower than in the two other distributive trades sectors, reflecting the high turnover and purchases (mainly for resale in the same condition as purchased) and relatively low margins typically associated with wholesale trade. Wholesale trade gross operating rates among the Member States [6] did not vary greatly as all were situated within the range of 3.0 % (France) to 9.1 % (Malta, 2002), narrower than for both of the other distributive trades sectors.

[5] Malta, 2002; Greece, not available.
[6] Malta, 2002; Greece, not available.

Table 17.4

Wholesale trade and commission trade (NACE Division 51)

Cost, productivity and profitability indicators, ranking of the top 5 Member States compared to EU-25 averages, 2003 (1)

Rank	Investment in tangible goods relative to total operating costs (%) (2)	Purchases of goods and services as a share of total operating costs (%) (2)	Personnel costs as a share of total operating costs (%) (2)	Apparent labour productivity (EUR thousand)	Average personnel costs (EUR thousand) (3)	Wage adjusted labour productivity (%) (3)	Gross operating rate (%) (3)
EU-25	1.3	92.9	7.1	48.2	30.2	156.4	5.4
1	Latvia (2.8)	Latvia (96.7)	Sweden (10.3)	Finland (67.8)	Belgium (48.7)	Latvia (375.6)	Malta (9.1)
2	Estonia (2.6)	Poland (96.2)	Cyprus (9.9)	Belgium (67.6)	Sweden (47.7)	Lithuania (205.5)	Latvia (8.4)
3	Lithuania (2.5)	Czech Republic (95.5)	Denmark (9.3)	Netherlands (67.4)	Denmark (45.8)	Estonia (204.3)	Italy (7.8)
4	Portugal (2.2)	Hungary (95.5)	Austria (8.7)	Ireland (66.9)	Finland (42.1)	Slovakia (200.5)	Ireland (6.6)
5	Cyprus (2.2)	Estonia (95.4)	Slovenia (8.1)	Germany (66.0)	Austria (42.1)	Hungary (198.1)	Cyprus (6.3)

(1) Malta, 2002; Greece, not available.
(2) EU-25 is an EU average based on available data for 2002 and 2003.
(3) EU-25, 2002.
Source: Eurostat (SBS)

17.1: WHOLESALE ON A FEE OR CONTRACT BASIS

This wholesale sector covers agents trading on behalf and on account of others, those involved in bringing sellers and buyers together and those undertaking commercial transactions on behalf of a principal (NACE Group 51.1). It does not include financial intermediaries such as insurance or real estate agents, nor retail sale by agents.

Wholesalers acting as agents provide a service, acting to bring together the two parties to a transaction, namely the buyer and the seller. In doing so, their turnover is mainly composed of the fees and commissions they charge for their services; unlike own-account wholesalers their turnover does not reflect the value of the goods that they trade.

STRUCTURAL PROFILE

In 2003 value added for wholesale on a fee or contract basis (NACE Group 51.1) was EUR 35.6 billion in the EU-25 and represented 8.4 % of total value added in the wholesale trade sector (NACE Division 51). Using this measure, wholesale on a fee or contract basis was the third smallest wholesale trade activity (NACE group), ahead of the agricultural wholesaling sector and the residual sector of other wholesale. There were 831 900 persons employed in the wholesale on a fee or contract basis sector in the EU-25 in 2003, equivalent to 9.5 % of the total wholesale trade workforce.

Among the Member States, Italy had by far the largest wholesale on a fee or contract basis sector, with EUR 12.3 billion of value added in 2003, slightly more than one third of the EU-25's value added - see Table 17.5. Unsurprisingly, with such a large contribution to the EU-25 total, Italian wholesaling was very concentrated in this form of wholesaling, as this sector generated 26.0 % of Italian wholesale value added in 2003. The only Member State (7) more concentrated in this form of wholesaling was Slovenia, where wholesale on a fee or contract basis accounted for 28.6 % of wholesale trade value added, while this share was also very high in Slovakia (22.2 %). By the same measure, Lithuania's wholesale trade was least concentrated in this particular form, as wholesale on a fee or contract basis accounted for just 1.8 % of total value added.

(7) Malta, 2002; Greece, not available.

COSTS, PRODUCTIVITY AND PROFITABILITY

Apparent labour productivity was EUR 42 800 per person employed in the EU-25's wholesale trade on a fee or contract basis sector in 2003, somewhat below the wholesale trade average (EUR 48 200). It is likely that a high proportion of persons working part-time in this activity could account, in part, for the relatively low levels of apparent labour productivity.

Average personnel costs in 2003 were EUR 31 500 per employee in the EU (8), only slightly below the wholesale trade average, leading to a wage adjusted labour productivity ratio of 136.6 %, well below the wholesale trade average. In contrast, in 2003 the highest gross operating rate among the EU's (9) wholesale trade activities (NACE groups) was recorded in this sector, with a gross operating surplus equivalent to 12.9 % of turnover.

(8) EU average, 2003; Malta, 2002; excluding Greece.
(9) EU average, 2003; Malta, 2002; excluding Greece.

Table 17.5

Wholesale on a fee or contract basis (NACE Group 51.1)
Value added and employment: ranking of the top 5 Member States, 2003

Rank	Highest value added (EUR million) (1)	Share in EU-25 value added (%) (1)	Highest number of persons employed (thousands) (1)	Share in EU-25 employment (%) (1)	Highest share of national non-financial services value added (%) (2)	Highest share of national non-financial services employment (%) (2)
1	Italy (12 258.1)	34.5	Italy (312.0)	37.5	Slovenia (6.0)	Slovenia (6.4)
2	United Kingdom (5 329.3)	15.0	France (76.2)	9.2	Slovakia (5.5)	Slovakia (4.7)
3	France (5 288.7)	14.9	Spain (72.4)	8.7	Italy (4.6)	Italy (4.0)
4	Germany (3 872.2)	10.9	United Kingdom (72.2)	8.7	Czech Republic (1.8)	Czech Republic (2.1)
5	Spain (2 532.7)	7.1	Germany (57.5)	6.9	Hungary (1.8)	Portugal (1.5)

(1) Malta, 2002; Greece, not available.
(2) Lithuania and Malta, 2002; Greece and Cyprus, not available.
Source: Eurostat (SBS)

17.2: AGRICULTURAL WHOLESALING

This subchapter covers the wholesaling of raw materials for agricultural activities (such as seeds and animal feed), as well as live animals. It does not cover the wholesaling of outputs from farming other than hides, skins and leather, and unmanufactured tobacco (NACE Group 51.2).

STRUCTURAL PROFILE

Agricultural wholesaling (NACE Group 51.2) was the smallest own-account wholesale trade subsector at the NACE group level, whether measured in terms of turnover, value added or employment. Indeed, the turnover generated by agricultural wholesaling was EUR 175.0 billion and value added EUR 13.6 billion in the EU-25 in 2003, which represented around 5.1 % of own-account wholesale (NACE Groups 51.2 to 51.9) turnover and 3.2 % of wholesale trade (NACE Division 51) value added. There were 319 800 persons employed in this sector in the EU-25 in 2003, some 3.6 % of the total number of persons employed in the wholesale trade sector.

Among the Member States, France recorded the highest turnover and number of persons employed in the agricultural wholesale sector, while Germany generated the highest level of value added - see Table 17.6. France's high shares made it one of the most specialised Member States [10] in this sector in terms of the sector's contribution to non-financial services (NACE Sections G to I and K) value added and employment, however the Netherlands and Austria were the most specialised.

[10] Lithuania and Malta, 2002; Greece and Cyprus, not available.

The average size of agricultural wholesalers in the EU-25, as measured by turnover, was EUR 2.8 million per enterprise - see Figure 17.6 - some EUR 0.4 million below the own-account wholesale trade average in 2003. An analysis of this sector's turnover by activity for the EU [11] - see Figure 17.7, shows that the wholesale trade of grain, seeds and animal feeds (NACE Class 51.21) dominated with more than three fifths (63.0 %) of sectoral turnover. The wholesale of live animals (NACE Class 51.23) contributed one fifth (20.6 %) of sectoral turnover, and the wholesale of flowers and plants (NACE Class 51.22) just over one tenth (11.9 %). The wholesale of hides, skins and leather (NACE Class 51.24) and the wholesale of unmanufactured tobacco (NACE Class 51.25) combined to contribute 4.5 % of sectoral turnover.

According to annualised short-term statistics, after a 3.1 % increase in the turnover index in 2000, the evolution of sales for the agricultural wholesaling sector recorded a series of small increases and decreases in turnover, ranging from -0.6 % in 2002 to 1.5 % in 2004. Between 2000 and 2005 the agricultural wholesaling sector generally recorded a slower rate of expansion for turnover than the wholesale trade average - see Figure 17.8.

[11] EU average, 2003; Hungary, 2002; excluding the Czech Republic, Greece, Ireland, Luxembourg, Malta and Slovakia.

COSTS, PRODUCTIVITY AND PROFITABILITY

In 2003 the apparent labour productivity of the agricultural wholesaling sector was EUR 42 700 per person employed in the EU-25, some EUR 5 500 below the wholesale trade average. At EUR 26 600 per employee in 2002, average personnel costs in this sector were also below the wholesale trade average (by EUR 3 600). The wage adjusted labour productivity ratio was 148.7 %, some 7.7 percentage points below the average for wholesale trade. The gross operating rate of the agricultural wholesaling sector was relatively low, as the gross operating surplus was equivalent to just 3.2 % of turnover in the EU-25 in 2002, the lowest rate among all of the wholesale trade activities (NACE groups). The gross operating rate was below the wholesale trade average in all Member States [12] in 2003 except for Estonia, Slovakia and the United Kingdom.

[12] Malta, 2002; Greece, not available.

Table 17.6

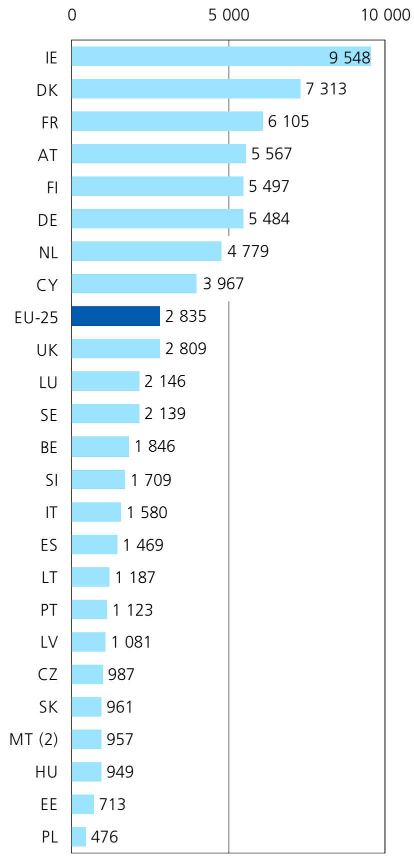
Wholesale of agricultural raw materials, live animals (NACE Group 51.2)
Turnover, value added and employment: ranking of the top 5 Member States, 2003

Rank	Highest turnover (EUR million) (1)	Share in EU-25 turnover (%) (1)	Highest value added (EUR million) (1)	Share in EU-25 value added (%) (1)	Highest number of persons employed (thousands) (1)	Share in EU-25 employment (%) (1)	Highest share of national non-financial services value added (%) (2)	Highest share of national non-financial services employment (%) (2)
1	France (46 043.4)	26.3	Germany (3 064.0)	22.5	France (55.0)	17.2	Netherlands (1.4)	Austria (1.2)
2	Germany (33 458.8)	19.1	France (2 882.0)	21.1	Germany (52.4)	16.4	Austria (1.0)	Netherlands (1.0)
3	Netherlands (23 323.1)	13.3	Netherlands (1 952.2)	14.3	Spain (35.7)	11.2	Hungary (0.8)	Ireland (0.8)
4	Spain (15 641.0)	8.9	Italy (1 133.7)	8.3	Netherlands (31.8)	9.9	France (0.7)	Slovakia (0.7)
5	Italy (15 489.7)	8.9	United Kingdom (1 056.0)	7.7	Italy (27.6)	8.6	Slovakia (0.6)	France (0.7)

(1) Malta, 2002; Greece, not available.
(2) Lithuania and Malta, 2002; Greece and Cyprus, not available.
Source: Eurostat (SBS)

Figure 17.6

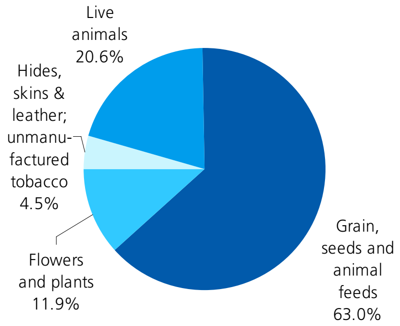
Wholesale of agricultural raw materials, live animals (NACE Group 51.2)
Turnover per enterprise, 2003
(EUR thousand) (1)



(1) Greece, not available.
(2) 2002.
Source: Eurostat (SBS)

Figure 17.7

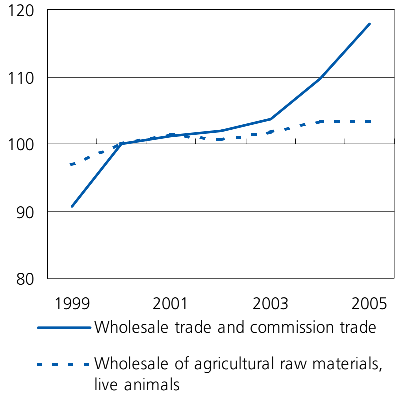
Wholesale of agricultural raw materials, live animals (NACE Group 51.2)
Breakdown of sectoral turnover, EU, 2003 (%) (1)



(1) EU average, 2003; Hungary, 2002; excluding the Czech Republic, Greece, Ireland, Luxembourg, Malta and Slovakia.
Source: Eurostat (SBS)

Figure 17.8

Wholesale of agricultural raw materials, live animals (NACE Group 51.2)
Evolution of turnover index, EU-25 (2000=100)



Source: Eurostat (STS)

17.3: WHOLESALING OF CONSUMER GOODS

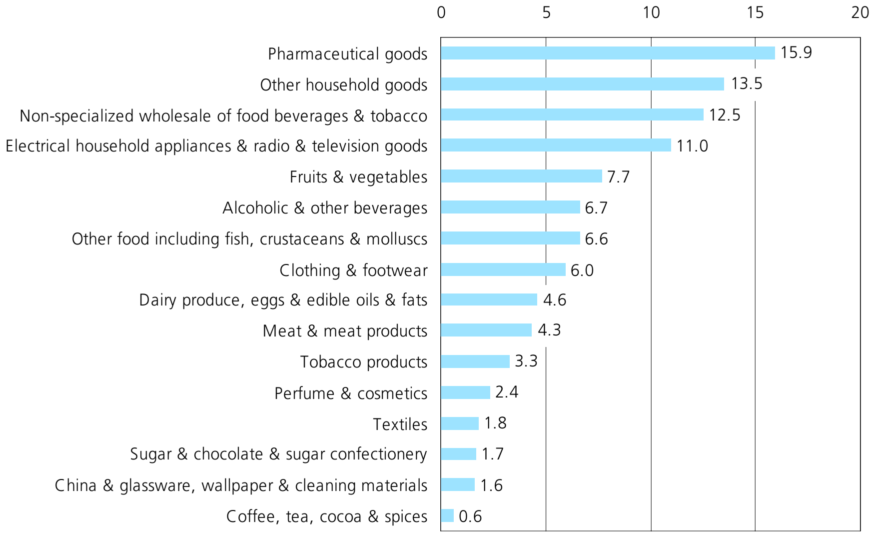
The wholesaling of consumer goods covers NACE Groups 51.3 and 51.4. The first of these groups includes the wholesaling of food, beverages and tobacco, while the latter includes household products, such as textiles, clothing, electrical appliances, games, toys, tableware, furniture and furnishings, as well as cleaning products and personal products. It should be noted that although these two categories are grouped together here as consumer goods, these activities also include the wholesaling of food and beverage products as inputs for further processing.

STRUCTURAL PROFILE

The wholesaling of consumer goods (defined as the aggregate of NACE Groups 51.3 and 51.4) generated EUR 170.2 billion of value added in 2003 in the EU-25 from a turnover of EUR 1 447 billion. These figures were equivalent to 40.2 % of EU-25 wholesale trade (NACE Division 51) value added and 42.6 % of own-account wholesale trade (NACE Groups 51.2 to 51.9) turnover. In terms of the number of persons employed, this sector provided employment to 3.6 million persons in the EU-25, equivalent to 41.3 % of the wholesale trade workforce.

Figure 17.9

Wholesale of consumer goods (NACE Groups 51.3 and 51.4)
Breakdown of sectoral turnover, EU, 2003 (%) (1)



(1) EU average, 2003; Malta, 2002; excluding the Czech Republic, Greece and Ireland.
Source: Eurostat (SBS)

Germany was to some extent the dominant Member State in the wholesale of consumer goods, with close to one fifth of EU-25 value added and turnover, although Spain had a slightly larger workforce. Portugal, the Baltic Member States, Belgium, the Netherlands and Hungary were the most specialised Member States [13] in terms of this sector's contribution to non-financial services (NACE Sections G to I and K) value added, while Malta (2002) and Spain were also relatively specialised in employment terms.

In the EU-25, turnover was quite evenly split between the wholesale of household goods (NACE Group 51.4) which had a 52.0 % share and the wholesale of food, beverages and tobacco (NACE Group 51.3) with the remaining 48.0 %. Figure 17.9 provides a more detailed breakdown of the turnover of consumer goods wholesaling.

(13) Lithuania and Malta, 2002; Greece and Cyprus, not available.

Table 17.7

Wholesale of consumer goods (NACE Groups 51.3 and 51.4)
Turnover, value added and employment: ranking of the top 5 Member States, 2003

Rank	Highest turnover (EUR million) (1)	Share in EU-25 turnover (%) (1)	Highest value added (EUR million) (1)	Share in EU-25 value added (%) (1)	Highest number of persons employed (thousands) (1)	Share in EU-25 employment (%) (1)	Highest share of national non-financial services value added (%) (2)	Highest share of national non-financial services employment (%) (2)
1	Germany (275 216.7)	19.0	Germany (32 839.5)	19.3	Spain (573.3)	15.8	Portugal (11.4)	Portugal (8.7)
2	United Kingdom (205 893.8)	14.2	United Kingdom (28 984.9)	17.0	Germany (545.7)	15.0	Lithuania (9.9)	Malta (7.9)
3	France (203 424.5)	14.1	France (22 315.8)	13.1	United Kingdom (498.6)	13.8	Latvia (9.1)	Spain (7.9)
4	Italy (170 700.1)	11.8	Spain (18 926.6)	11.1	Italy (417.0)	11.5	Belgium (8.9)	Lithuania (7.7)
5	Spain (161 765.9)	11.2	Italy (18 167.2)	10.7	France (388.7)	10.7	Netherlands (8.8)	Latvia (6.8)

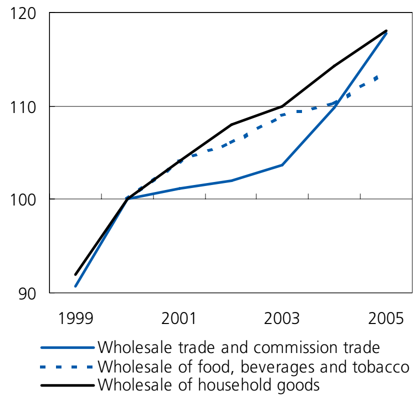
(1) Malta, 2002; Greece, not available.
(2) Lithuania and Malta, 2002; Greece and Cyprus, not available.
Source: Eurostat (SBS)

Figure 17.10 shows the average turnover per enterprise of the consumer goods wholesaling sector. In 2003 this was EUR 2.9 million in the EU-25, ranging from EUR 2.6 million per enterprise for the household goods wholesaling subsector, to EUR 3.6 million per enterprise for the food, beverages and tobacco wholesaling subsector.

An analysis of the evolution of turnover indices for consumer goods wholesaling can be made for each of the two NACE groups that compose this sector - see Figure 17.11. The turnover index registered gains for both of these activities in all of the last five years (2001 to 2005 inclusive), a feat matched by none of the other own-account wholesale activities (NACE groups). Between 2000 and 2004 both of these activities recorded more pronounced growth than wholesale trade as a whole. However in 2005 the wholesale of food, beverages and tobacco and the wholesale of household goods both recorded growth of just over 3 %, less than half the 7.3 % growth recorded for wholesale trade as a whole.

Figure 17.11

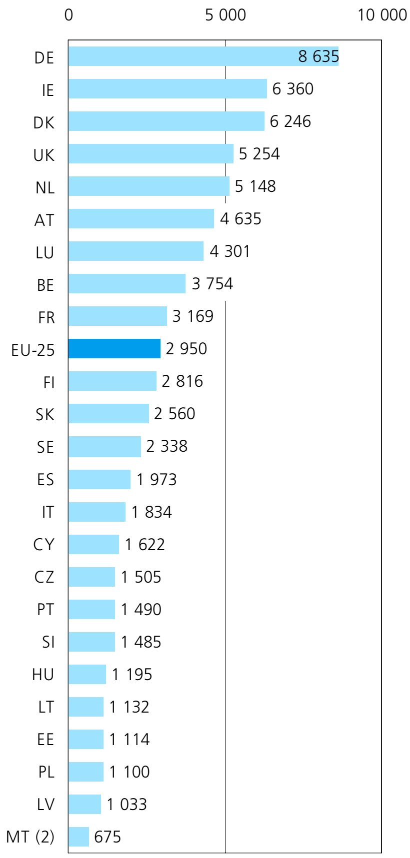
Wholesale of consumer goods (NACE Groups 51.3 and 51.4) Evolution of turnover index, EU-25 (2000=100)



Source: Eurostat (STS)

Figure 17.10

Wholesale of consumer goods (NACE Groups 51.3 and 51.4) Turnover per enterprise, 2003 (EUR thousand) (1)



(1) Greece, not available.
(2) 2002.
Source: Eurostat (SBS)

COSTS, PRODUCTIVITY AND PROFITABILITY

Apparent labour productivity for consumer goods wholesaling was EUR 46 900 per person employed in the EU-25 in 2003, slightly below the wholesale trade average (EUR 48 200). By this measure of productivity there was a large difference between the two NACE groups that compose this sector, as apparent labour productivity for the wholesale trade of food, beverages and tobacco was EUR 38 600 per person employed, while for the wholesale trade of household products the level was EUR 53 700; this latter figure was the second highest apparent labour productivity ratio among all wholesale trade activities in 2003, lower only than for the wholesale trade of machinery, equipment and supplies (NACE Group 51.8).

Average personnel costs were EUR 28 300 per employee in 2002 in the EU-25's consumer goods wholesaling sector, once again slightly less than the wholesale trade average. As with apparent labour productivity, this ratio was higher for the wholesale trade of household products (EUR 31 300) than for the wholesale trade of food, beverages and tobacco (EUR 24 700).

The result of these slightly lower than average productivity and personnel costs for consumer goods wholesaling was a wage adjusted labour productivity ratio of 161.8 % in the EU-25 in 2002, some 5.4 percentage points above the wholesale trade average.

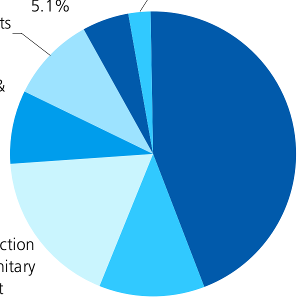
The gross operating rate was 5.2 % in the EU-25's consumer goods wholesaling sector in 2002, marginally below the wholesale trade average of 5.4 %. According to this measure of profitability the two subsectors performed differently, as the wholesale of food, beverages and tobacco subsector recorded a rate of 4.1 %, while that for the wholesale of household products was 1.5 times as high at 6.2 %.

17.4: WHOLESALING OF INTERMEDIATE GOODS

The wholesaling of non-agricultural intermediate products (NACE Group 51.5) (hereafter referred to as wholesaling of intermediate goods) covers the wholesale of all products used as production materials, fuel or other consumables, except for agricultural products (which are treated in Subchapter 17.2). It includes, for example, the wholesaling of fuels, construction materials, hardware and chemical products, as well as the wholesaling of scrap.

Figure 17.12

Wholesale of non-agricultural intermediate products, waste and scrap (NACE Group 51.5)
Breakdown of sectoral turnover, EU, 2003 (%) (1)



(1) EU average, 2003; Malta, 2002; excluding the Czech Republic, Greece and Ireland.
Source: Eurostat (SBS)

Table 17.8

Wholesale of non-agricultural intermediate products, waste and scrap (NACE Group 51.5)
Turnover, value added and employment: ranking of the top 5 Member States, 2003

Rank	Highest turnover (EUR million) (1)	Share in EU-25 turnover (%) (1)	Highest value added (EUR million) (1)	Share in EU-25 value added (%) (1)	Highest number of persons employed (thousands) (1)	Share in EU-25 employment (%) (1)	Highest share of national non-financial services value added (%) (2)	Highest share of national non-financial services employment (%) (2)
1	United Kingdom (250 041.4)	23.9	Germany (19 342.4)	20.8	Germany (300.1)	16.5	Latvia (9.2)	Lithuania (4.7)
2	Germany (195 409.3)	18.7	United Kingdom (16 040.0)	17.2	United Kingdom (258.5)	14.2	Estonia (7.3)	Estonia (4.7)
3	Italy (112 358.6)	10.8	France (11 654.2)	12.5	France (216.9)	11.9	Lithuania (7.1)	Latvia (4.5)
4	France (98 890.7)	9.5	Spain (9 365.0)	10.0	Spain (208.5)	11.5	Poland (5.8)	Denmark (3.7)
5	Spain (89 671.9)	8.6	Italy (9 305.6)	10.0	Italy (180.9)	9.9	Czech Republic (4.9)	Sweden (3.6)

(1) Malta, 2002; Greece, not available.
(2) Lithuania and Malta, 2002; Greece and Cyprus, not available.
Source: Eurostat (SBS)

STRUCTURAL PROFILE

Turnover in the EU-25's wholesaling of intermediate goods sector (NACE Group 51.5) was EUR 1 045 billion in 2003, and from these sales EUR 93.2 billion of value added was generated. This level of activity corresponded to 30.7 % of own-account wholesale trade (NACE Groups 51.2 to 51.9) turnover and 22.0 % of wholesale trade (NACE Division 51) value added. The intermediate goods wholesaling sector employed 1.8 million persons in the EU-25 in 2003, one fifth (20.7 %) of the wholesale trade workforce. As such, this sector was the second largest of the wholesale trade activities (NACE groups) in value added and employment terms and the largest in turnover terms.

Germany accounted for around one fifth of the EU-25's value added in intermediate goods wholesaling, ahead of the United Kingdom (see Table 17.8), and these two Member States also recorded the largest workforces and the highest levels of turnover. The Baltic States were the most specialised Member States [14] in this activity in terms its contribution to non-financial services (NACE Sections G to I and K) employment and value added. In value added terms, the United Kingdom and France were the least specialised in this activity, each generating less than 3 % of their non-financial services value added in this sector.

(14) Lithuania and Malta, 2002; Greece and Cyprus, not available.

The wholesale of intermediate goods is made up of seven NACE classes, for which a turnover analysis is available for the EU [15]. The wholesale of solid, liquid and gaseous fuels and related products (NACE Class 51.51) was by far the largest subsector with 44.3 % of intermediate goods wholesale trade turnover in 2003 - see Figure 17.12. The wholesale of wood, construction materials and sanitary equipment (NACE Class 51.53) represented the second largest share of turnover with 17.8 % of the total.

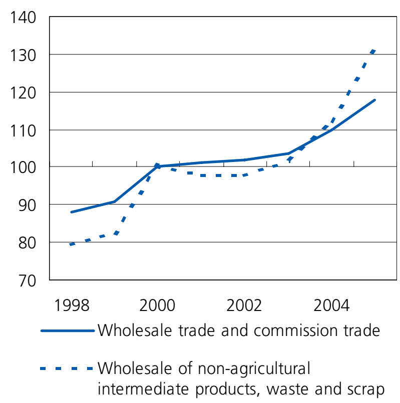
(15) EU average, 2003; Malta, 2002; excluding the Czech Republic, Greece and Ireland.

Figure 17.13 shows the average enterprise size in terms of turnover. Enterprises in the intermediate goods wholesale trade sector were relatively large, with an average turnover of EUR 4.9 million in the EU-25 in 2003, the highest among the own-account wholesale trade activities. The two Member States with the largest intermediate goods wholesaling sectors, the United Kingdom and Germany, also had the largest enterprises by this measure.

Annualised short-term statistics provide information on the evolution of the turnover index for the wholesale trade of intermediate goods - see Figure 17.14. This sector experienced very strong turnover growth in 2000, with an increase of 21.3 % registered for the EU-25. There was a sharp change in fortunes as turnover contracted by 2.2 % in 2001 followed by stagnation in 2002 (-0.1 %). In 2003 the EU-25's index of turnover increased by 4.1 %, and this upward development was reinforced in 2004 and 2005 as growth of 10.2 % and 16.7 % respectively was recorded (the highest growth rates among own-account wholesale trade NACE groups in both years). The contraction and relative stagnation experienced in 2001 and 2002 reflected in part the development of output among clients of this sector, namely industrial activities, while the strong growth in the latter years may well reflect in part price increases, notably those concerning the wholesaling of fuel which makes up a large part of this sector.

Figure 17.14

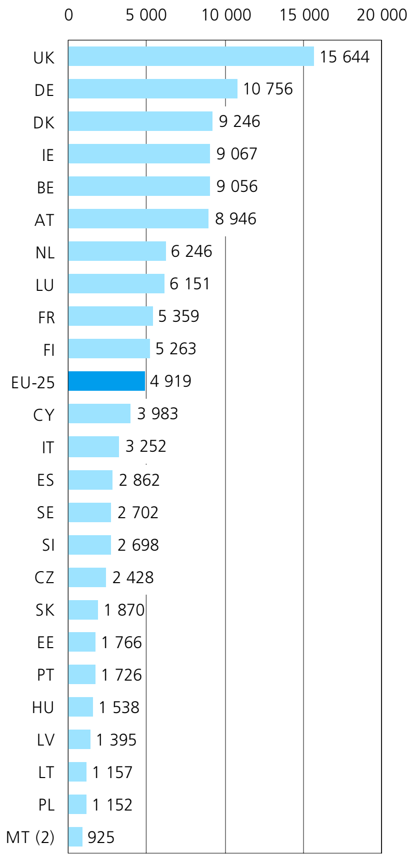
Wholesale of non-agricultural intermediate products, waste and scrap (NACE Group 51.5)
Evolution of turnover index, EU-25 (2000=100)



Source: Eurostat (STS)

Figure 17.13

Wholesale of non-agricultural intermediate products, waste and scrap (NACE Group 51.5)
Turnover per enterprise, 2003 (EUR thousand) (1)



(1) Greece, not available.
(2) 2002.
Source: Eurostat (SBS)

COSTS, PRODUCTIVITY AND PROFITABILITY

Apparent labour productivity in the EU-25 was EUR 51 200 per person employed in the wholesaling of intermediate goods sector in 2003, the third highest level among the NACE groups that make-up the wholesale trade sector, and EUR 3 000 above the wholesale trade average. Average personnel costs were EUR 30 200 per employee in the EU-25 in 2002, the same as the wholesale trade average. The slightly higher apparent labour productivity combined with a standard level of average personnel costs resulted in this sector having a relatively high wage adjusted labour productivity ratio of 177.3 % in 2002. In 2003 only in Germany was the wage adjusted labour productivity ratio in this sector below the national average for wholesale trade [16]. The gross operating rate for the wholesale trade of intermediate goods in the EU-25 was 4.5 % in 2002, nearly one percentage point below the wholesale trade average.

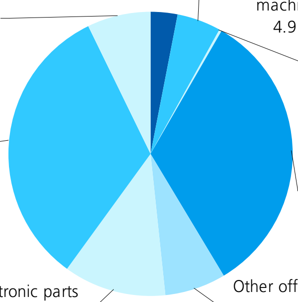
(16) Malta, 2002; Greece, not available.

17.5: WHOLESALING OF MACHINERY AND EQUIPMENT

The wholesaling of machinery, equipment and supplies concerns the wholesaling of capital goods and other final durable goods for industrial use, except those covered by motor trade. Wholesaling of installation equipment, as well as electrical and electronic products for industrial use and the wholesaling of office furniture are all included. In NACE these activities are covered by Group 51.8.

Figure 17.15

Wholesale of machinery, equipment and supplies (NACE Group 51.8)
Breakdown of sectoral turnover, EU, 2003 (%) (1)



(1) EU average, 2003; excluding the Czech Republic, Greece, Ireland, Luxembourg, Malta and Slovenia.
Source: Eurostat (SBS)

Table 17.9

Wholesale of machinery, equipment and supplies (NACE Group 51.8)
Turnover, value added and employment: ranking of the top 5 Member States, 2003

Rank	Highest turnover (EUR million) (1)	Share in EU-25 turnover (%) (1)	Highest value added (EUR million) (1)	Share in EU-25 value added (%) (1)	Highest number of persons employed (thousands) (1)	Share in EU-25 employment (%) (1)	Highest share of national non-financial services value added (%) (2)	Highest share of national non-financial services employment (%) (2)
1	France (104 647.2)	18.9	France (16 129.9)	18.9	France (293.2)	19.1	Netherlands (6.0)	Denmark (5.1)
2	United Kingdom (85 387.4)	15.4	United Kingdom (15 654.3)	18.3	United Kingdom (234.8)	15.3	Denmark (5.9)	Finland (4.1)
3	Netherlands (79 711.4)	14.4	Germany (12 013.8)	14.1	Germany (198.0)	12.9	Finland (5.7)	Belgium (4.1)
4	Germany (76 133.5)	13.8	Netherlands (8 649.5)	10.1	Spain (180.1)	11.7	Belgium (5.6)	Netherlands (4.0)
5	Spain (51 139.0)	9.2	Spain (8 234.4)	9.6	Netherlands (127.3)	8.3	Austria (4.4)	Sweden (3.8)

(1) Malta, 2002; Greece, not available.
(2) Lithuania and Malta, 2002; Greece and Cyprus, not available.
Source: Eurostat (SBS)

STRUCTURAL PROFILE

Turnover in the EU-25's wholesaling of machinery and equipment sector (NACE Group 51.8) was EUR 553.2 billion in 2003, and value added EUR 85.5 billion. As such, the wholesaling of machinery and equipment represented 16.3 % of own-account wholesale trade (NACE Groups 51.2 to 51.9) turnover and 20.2 % of wholesale trade (NACE Division 51) value added. The number of persons employed by the wholesaling of machinery and equipment sector reached 1.5 million persons in the EU-25 in 2003, corresponding to 17.5 % of the wholesale trade workforce.

France had the largest wholesale trade of machinery and equipment sector among the Member States (see Table 17.9) in turnover, value added and employment terms, followed by the United Kingdom. In value added terms, the Nordic Member States, as well as Belgium, the Netherlands and Austria were all relatively specialised in the wholesaling of machinery and equipment [17], while in Slovenia and Poland these activities contributed less than 1.5 % to non-financial services (NACE Sections G to I and K) value added.

[17] Lithuania and Malta, 2002; Greece and Cyprus, not available.

An analysis of sectoral turnover for the EU [18] is shown in Figure 17.15. Two activities dominated with around one third of sectoral turnover each, namely the wholesale trade of computers, their peripherals and software (NACE Class 51.84) with a 32.9 % share, and the miscellaneous category of wholesale trade of other machinery for use in industry, trade and navigation (NACE Class 51.87) with a 33.5 % share. The wholesale of other electronic parts and equipment was the only other activity at the NACE class level to contribute more than 10 % to sectoral turnover.

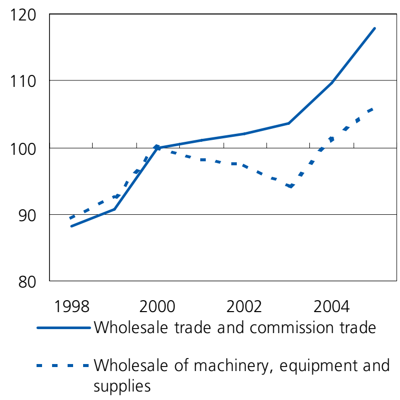
[18] EU average, 2003; excluding the Czech Republic, Greece, Ireland, Luxembourg, Malta and Slovenia.

Figure 17.16 provides information on the average size of enterprises in the machinery and equipment wholesaling sector in terms of their turnover. In 2003 the average turnover per enterprise in the EU-25 was EUR 3.1 million, marginally lower than the own-account wholesale trade average of EUR 3.2 million.

In the EU-25 the turnover index for the machinery and equipment wholesaling sector rose by 3.6 % and 7.9 % in 1999 and 2000, after which the sector experienced three years of contraction with sales falling on average by 2.0 % per annum - see Figure 17.17. In 2004 and 2005 there was renewed turnover growth, as the index increased by 7.3 % and 5.0 % respectively.

Figure 17.17

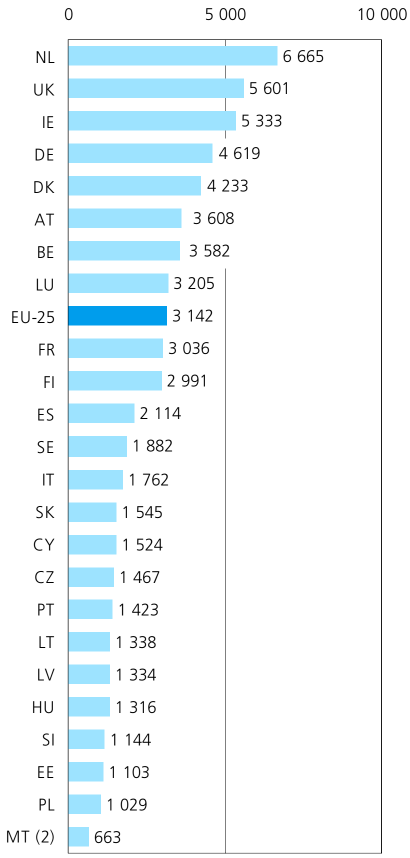
Wholesale of machinery, equipment and supplies (NACE Group 51.8)
Evolution of turnover index, EU-25 (2000=100)



Source: Eurostat (STS)

Figure 17.16

Wholesale of machinery, equipment and supplies (NACE Group 51.8)
Turnover per enterprise, 2003 (EUR thousand) (1)



(1) Greece, not available.
(2) 2002.
Source: Eurostat (SBS)

COSTS, PRODUCTIVITY AND PROFITABILITY

Machinery and equipment wholesaling had the highest apparent labour productivity (EUR 55 600 per person employed in 2003) among the NACE groups that make-up the EU-25's wholesale trade sector, some EUR 7 400 more than the wholesale trade average. At EUR 41 400 per employee, average personnel costs in the EU's [19] machinery and equipment wholesaling sector were also well above the wholesale trade average resulting in a wage adjusted labour productivity of 135.1 %, the lowest among wholesale trade NACE groups. Several Member States did however record a wage adjusted labour productivity ratio above the wholesale trade average, most notably Slovenia, Slovakia and Poland.

[19] EU average, 2003; Malta, 2002; excluding Greece.

17.6: OTHER WHOLESALE TRADE

The other wholesale trade sector covers specialised own-account wholesaling of products not covered in Subchapters 17.2 to 17.5, as well as non-specialised wholesaling, where enterprises resell a variety of products. These activities are covered by NACE Group 51.9.

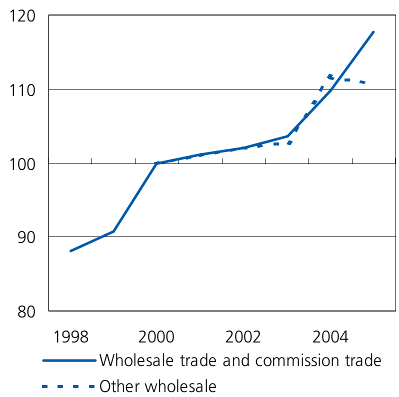
STRUCTURAL PROFILE

Turnover in the EU-25's other wholesale trade (NACE Group 51.9) sector in 2003 was EUR 179.5 billion from which EUR 25.7 billion of value added was generated. By both of these output measures this was the second smallest wholesale trade (NACE Division 51) activity at the NACE group level, larger only than agricultural wholesaling (NACE Group 51.2). There were 653 500 persons employed in other wholesale trade activities in the EU-25 in 2003, equivalent to 7.4 % of the wholesale trade workforce. Germany, Poland and the United Kingdom had the largest other wholesale trade sectors in turnover, value added and employment terms. Given its position in these rankings, Poland was unsurprisingly the most specialised Member State in terms of the contribution of these activities to non-financial services (NACE Sections G to I and K) value added and employment - see Table 17.10. Polish own-account wholesaling (NACE Groups 51.2 to 51.9) was highly concentrated in the other wholesale trade sector, which accounted for one third (34.8 %) of all Polish own-account wholesale turnover, compared with an EU-25 average of 5.3 %; in Slovakia and Slovenia more than one quarter of own-account wholesale trade turnover was generated in this sector.

Figure 17.18 shows average turnover per enterprise within the other wholesale trade sector. The EU-25 average for this ratio was particularly influenced by the high values reported in Germany and to a lesser extent Finland. Nevertheless, despite the very high averages in these two Member States, the average size of enterprises in the EU-25 within this sector (EUR 1.5 million in 2003) was less than half the own-account wholesale trade average, and the smallest across own-account wholesale trade NACE groups.

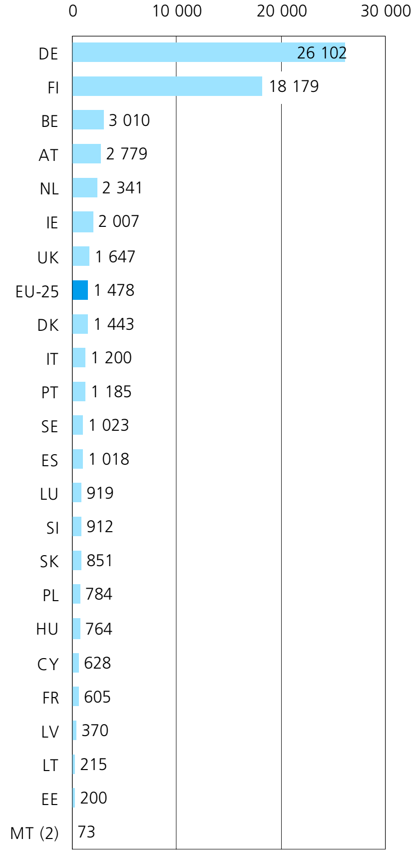
The other wholesale trade sector recorded a period of relative stagnation between 2000 and 2003 in turnover terms according to annualised short-term statistics - see Figure 17.19. Turnover then jumped 8.5 % in 2004 before declining by 0.8 % in 2005, the latter the result mainly of a slight fall in turnover in Germany (-1.2 %) and Poland (-0.1 %) combined with a much larger fall in the United Kingdom (-13.2 %).

Figure 17.19
Other wholesale (NACE Group 51.9)
Evolution of main indicators, EU-25 (2000=100)



Source: Eurostat (STS)

Figure 17.18
Other wholesale (NACE Group 51.9)
Turnover per enterprise, 2003 (EUR thousand) (1)



(1) The Czech Republic and Greece, not available.
(2) 2002.
Source: Eurostat (SBS)

Table 17.10
Other wholesale (NACE Group 51.9)
Turnover, value added and employment: ranking of the top 5 Member States, 2003

Rank	Highest turnover (EUR million) (1)	Share in EU-25 turnover (%) (1)	Highest value added (EUR million) (1)	Share in EU-25 value added (%) (1)	Highest number of persons employed (thousands) (1)	Share in EU-25 employment (%) (1)	Highest share of national non-financial services value added (%) (2)	Highest share of national non-financial services employment (%) (2)
1	Germany (47 506.4)	26.5	Germany (9 914.3)	38.6	Poland (245.8)	37.6	Poland (8.9)	Poland (6.3)
2	United Kingdom (37 341.8)	20.8	United Kingdom (5 338.8)	20.8	United Kingdom (108.6)	16.6	Slovakia (5.1)	Slovakia (4.8)
3	Poland (33 802.4)	18.8	Poland (3 352.9)	13.0	Germany (74.5)	11.4	Slovenia (4.1)	Estonia (3.7)
4	Netherlands (8 742.9)	4.9	Netherlands (1 346.0)	5.2	Netherlands (26.3)	4.0	Hungary (3.1)	Slovenia (3.3)
5	Italy (7 658.8)	4.3	Italy (908.3)	3.5	Hungary (23.2)	3.6	Estonia (2.4)	Hungary (1.7)

(1) Malta, 2002; the Czech Republic and Greece, not available.
(2) Malta and Lithuania, 2002; the Czech Republic, Greece and Cyprus, not available.
Source: Eurostat (SBS)

COSTS, PRODUCTIVITY AND PROFITABILITY

Apparent labour productivity was EUR 39 300 per person employed in the EU-25's other wholesale trade sector in 2003, the second lowest among the wholesale trade NACE groups. Average personnel costs in the other wholesale trade sector were EUR 22 500 per employee in the EU-25 in 2002, equivalent to around three quarters of the wholesale trade average. The wage adjusted labour productivity ratio was 131.5 % in 2002 in the EU-25's other wholesale trade sector, while the gross operating rate was 4.6 %; both of these ratios were below wholesale trade averages.

Table 17.11

Wholesale trade and commission trade, except of motor vehicles and motorcycles (NACE Division 51)
Main indicators, 2003 (1)

	EU-25	BE	CZ	DK	DE	EE	EL	ES	FR	IE	IT	CY	LV	LT	LU	HU	MT
Turnover (EUR million)	3 585 010	159 381	43 231	92 231	633 123	5 532	:	323 513	554 852	36 851	366 276	3 573	6 106	6 566	10 827	33 190	1 445
Production (EUR million)	:	44 570	9 735	50 321	136 661	1 174	:	74 615	149 930	8 241	222 363	798	1 222	1 387	1 699	6 766	344
Value added at factor cost (EUR million)	423 792	15 388	4 226	10 598	81 046	537	:	40 192	58 742	4 931	47 152	566	699	629	915	3 010	223
Gross operating surplus (EUR million) (2)	188 282	6 253	2 368	3 330	37 305	293	:	17 092	16 695	2 424	28 718	225	514	333	395	1 580	132
Purch. of goods and serv. (EUR million)	:	141 773	39 570	71 191	552 571	5 065	:	286 863	493 229	31 997	315 087	3 113	5 504	6 014	9 931	30 453	1 224
Gross inv. in tang. goods (EUR million)	:	1 841	694	1 170	4 146	137	:	5 985	5 215	495	6 638	77	162	159	85	692	24
Number of pers. employed (thousands)	8 788	228	237	163	1 228	36	:	1 073	1 040	74	1 067	18	45	66	14	164	10
Personnel costs (EUR million) (2)	222 383	9 135	1 858	7 268	43 741	245	:	23 100	42 047	2 476	18 434	341	186	296	520	1 430	91
App. lab. prod. (EUR thous./pers. emp.)	48.2	67.6	17.8	65.0	66.0	14.9	:	37.4	56.5	66.9	44.2	31.3	15.5	9.5	65.9	18.3	22.6
Av. pers. costs (EUR thous./empl.) (2)	30.2	48.7	10.1	45.8	38.4	7.3	:	24.8	41.0	35.7	32.2	19.2	4.1	4.6	40.8	9.2	11.7
Wage adj. labour productivity (%) (2)	156.4	138.7	176.7	142.0	171.7	204.3	:	151.2	137.9	187.3	137.0	162.9	375.6	205.5	161.5	198.1	192.7
Gross operating rate (%) (2)	5.4	3.9	5.5	3.6	5.9	5.3	:	5.3	3.0	6.6	7.8	6.3	8.4	5.1	3.7	4.8	9.1
Inv. per pers. empl. (EUR thousand)	:	8.1	2.9	7.2	3.4	3.8	:	5.6	5.0	6.7	6.2	4.2	3.6	2.4	6.1	4.2	2.4
	NL	**AT**	**PL**	**PT**	**SI**	**SK**	**FI**	**SE**	**UK**	**BG**	**HR**	**RO**	**TR**	**IS**	**LI**	**NO**	**CH**
Turnover (EUR million)	281 019	90 810	100 051	64 683	8 128	11 088	48 434	91 966	605 488	14 311	:	22 177	:	:	:	61 083	:
Production (EUR million)	61 332	26 314	44 083	15 354	2 294	2 692	11 908	23 811	152 719	2 065	:	5 039	:	:	:	19 031	:
Value added at factor cost (EUR million)	31 032	11 639	9 095	7 379	1 122	1 018	5 606	12 396	72 403	598	:	1 795	:	:	:	7 493	:
Gross operating surplus (EUR million)	13 200	4 350	5 472	3 047	503	517	2 238	3 679	33 102	363	:	1 110	:	:	:	2 443	:
Purch. of goods and serv. (EUR million)	250 232	76 159	90 701	57 829	7 049	10 116	44 031	80 500	512 702	14 084	:	21 125	:	:	:	51 309	:
Gross inv. in tang. goods (EUR million)	2 581	1 075	1 354	1 383	155	193	558	1 078	6 175	430	:	1 100	:	:	:	745	:
Number of pers. employed (thousands)	460	192	660	270	42	76	83	217	1 196	135	:	291	:	:	:	104	:
Personnel costs (EUR million)	17 832	7 289	3 623	4 332	619	501	3 367	9 231	39 302	236	:	686	:	:	:	5 050	:
App. lab. prod. (EUR thous./pers. emp.)	67.4	60.6	13.8	27.3	26.6	13.4	67.8	57.1	60.5	4.4	:	6.2	:	:	:	72.2	:
Av. pers. costs (EUR thous./empl.)	41.7	42.1	7.7	17.5	16.5	6.7	42.1	47.7	35.4	2.1	:	2.5	:	:	:	51.0	:
Wage adj. labour productivity (%)	161.5	144.0	179.8	156.0	161.6	200.5	161.2	119.8	170.9	214.7	:	247.1	:	:	:	141.5	:
Gross operating rate (%)	4.7	4.8	5.5	4.7	6.2	4.7	4.6	4.0	5.5	2.5	:	5.0	:	:	:	4.0	:
Inv. per pers. empl. (EUR thousand)	5.6	5.6	2.1	5.1	3.7	2.5	6.7	5.0	5.2	3.2	:	3.8	:	:	:	7.2	:

(1) Malta, 2002.
(2) EU-25, 2002.
Source: Eurostat (SBS)