

17

Motor trades

Motor trades (NACE Division 50) cover the wholesale, retail sale and repair of motor vehicles and motorcycles, as well as the retailing of automotive fuels and lubricants.

The activities within this chapter are very different in terms of the frequency of purchase of the goods and services offered. In contrast to the retail of automotive fuel, the purchase of motor vehicles is usually the result of a long-term process, the collection of information and comparison between different vehicles and different suppliers. However, retailing and repair of motor vehicles are to some extent substitutes, in that the purchase of a replacement vehicle may often be postponed, particularly in times of economic hardship.

Structural profile

There were 809.0 thousand enterprises active in the EU-27's motor trades (NACE Division 50) sector in 2006, employing 4.2 million persons, which represented 3.3 % of the non-financial business economy (NACE Sections C to I and K) workforce. The proportion of the persons employed that were paid employees (as opposed to working proprietors or unpaid family workers) in the EU-27's motor trades sector was 82.7 %, close to the 82.2 % registered for distributive trades (NACE Section G) as

a whole, but well below the 86.5 % average for the whole of the non-financial business economy. This workforce generated EUR 1.3 trillion of turnover, from which there was EUR 161.8 billion of value added (the equivalent of 2.9 % of the non-financial business economy total).

The retail sale of automotive fuel (NACE Group 50.5, see Subchapter 17.2) accounted for 8.6 % of the value added in this sector and 13.4 % of turnover, while it contributed 11.8 % of the labour force. The high turnover share reflects the purely distributive nature of this activity, whereas motor vehicles and motorcycles distribution (NACE Groups 50.1 to 50.4, see Subchapter 17.2) is a mixture of wholesale and retail trade, as well as repair, maintenance and other services activities.

Among the Member States with available data⁽¹⁾, Germany and the United Kingdom recorded the highest levels of value added and employment in 2006. Together they contributed 31.8 % of EU-27 employment and 45.4 % of EU-27 value added. However, in terms of relative shares in the value added of the non-financial business economy⁽²⁾, Latvia had the largest motor trades' sector (5.0 %), followed by Greece (4.0 %) and Lithuania (3.9 %). In employment terms⁽³⁾, Lithuania and Greece were joined by Cyprus (2005) as the most specialised.

(1) Bulgaria and Poland, 2005; Malta, not available.

(2) Bulgaria, Cyprus, Poland and Romania, 2005; Malta and the Netherlands, not available.

(3) Bulgaria, Cyprus, the Netherlands, Poland and Romania, 2005; Malta, not available.

Table 17.1: Motor trades (NACE Division 50)
Structural profile, EU-27, 2006

	Enterprises		Turnover		Value added		Persons employed	
	(thousand)	(% of total)	(EUR million)	(% of total)	(EUR million)	(% of total)	(thousand)	(% of total)
Motor trades	809.0	100.0	1 326 723	100.0	161 796	100.0	4 242.1	100.0
Motor vehicles and motorcycles distribution	734.4	90.8	1 148 720	86.6	147 819	91.4	3 740.2	88.2
Retail sale of automotive fuel	73.8	9.1	178 004	13.4	13 977	8.6	502.0	11.8

Source: Eurostat (SBS)

Table 17.2: Motor trades (NACE Division 50)
Structural profile: ranking of top five Member States, 2006

	Highest value added (1)			Largest number of persons employed (1)			Most specialised: share in the non-financial business economy (%)	
	Country	(EUR million)	(% of EU-27)	Country	(thousand)	(% of EU-27)	Value added (2)	Persons employed (3)
1	Germany	39 514	24.4	Germany	731.8	17.3	Latvia (5.0)	Lithuania (5.0)
2	United Kingdom	34 029	21.0	United Kingdom	613.1	14.5	Greece (4.0)	Greece (4.2)
3	France	18 596	11.5	Italy	482.2	11.4	Lithuania (3.9)	Cyprus (4.2)
4	Italy	15 122	9.3	France	458.3	10.8	Germany (3.4)	Luxembourg (4.0)
5	Spain	14 987	9.3	Spain	411.5	9.7	Estonia (3.4)	Portugal (4.0)

(1) Malta, not available; Bulgaria and Poland, 2005.

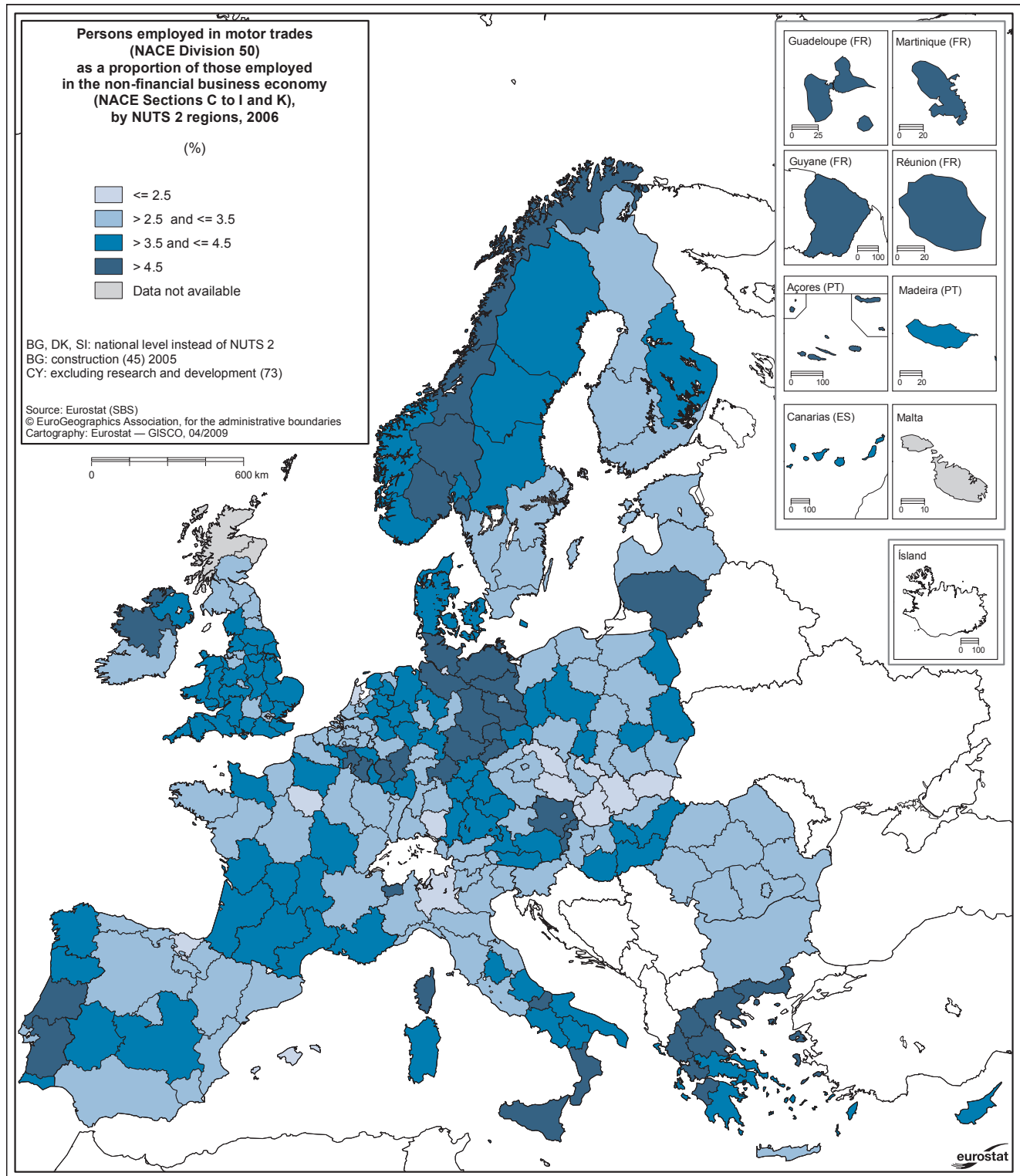
(2) Malta and the Netherlands, not available; Bulgaria, Cyprus, Poland and Romania, 2005.

(3) Malta, not available; Bulgaria, Cyprus, the Netherlands, Poland and Romania, 2005.

Source: Eurostat (SBS)

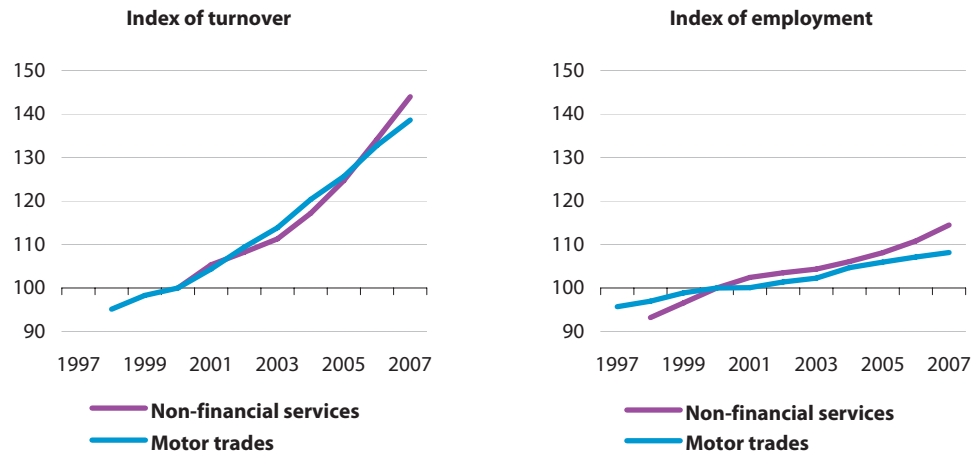
Map 17.1: Motor trades (NACE Division 50)

Persons employed in motor trades (NACE Division 50) as a proportion of those employed in the non-financial business economy (NACE Sections C to I and K) (%)



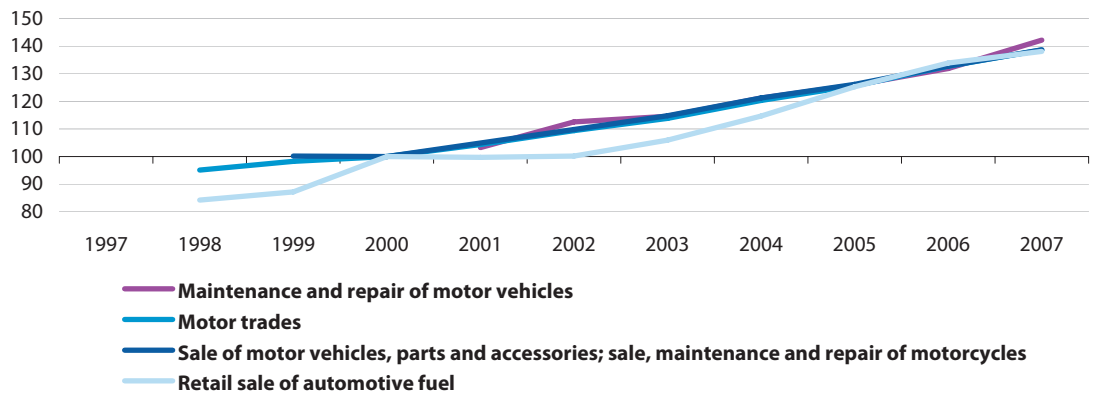
Source: Eurostat (SBS)

Figure 17.1: Motor trades (NACE Division 50)
Evolution of main indicators, EU-27 (2000=100)



Source: Eurostat (STS)

Figure 17.2: Motor trades (NACE Division 50)
Index of turnover, EU-27 (2000=100)



Source: Eurostat (STS)

Table 17.3: Motor trades (NACE Division 50)
Share of value added and persons employed by enterprise size class, EU-27, 2006 (%)

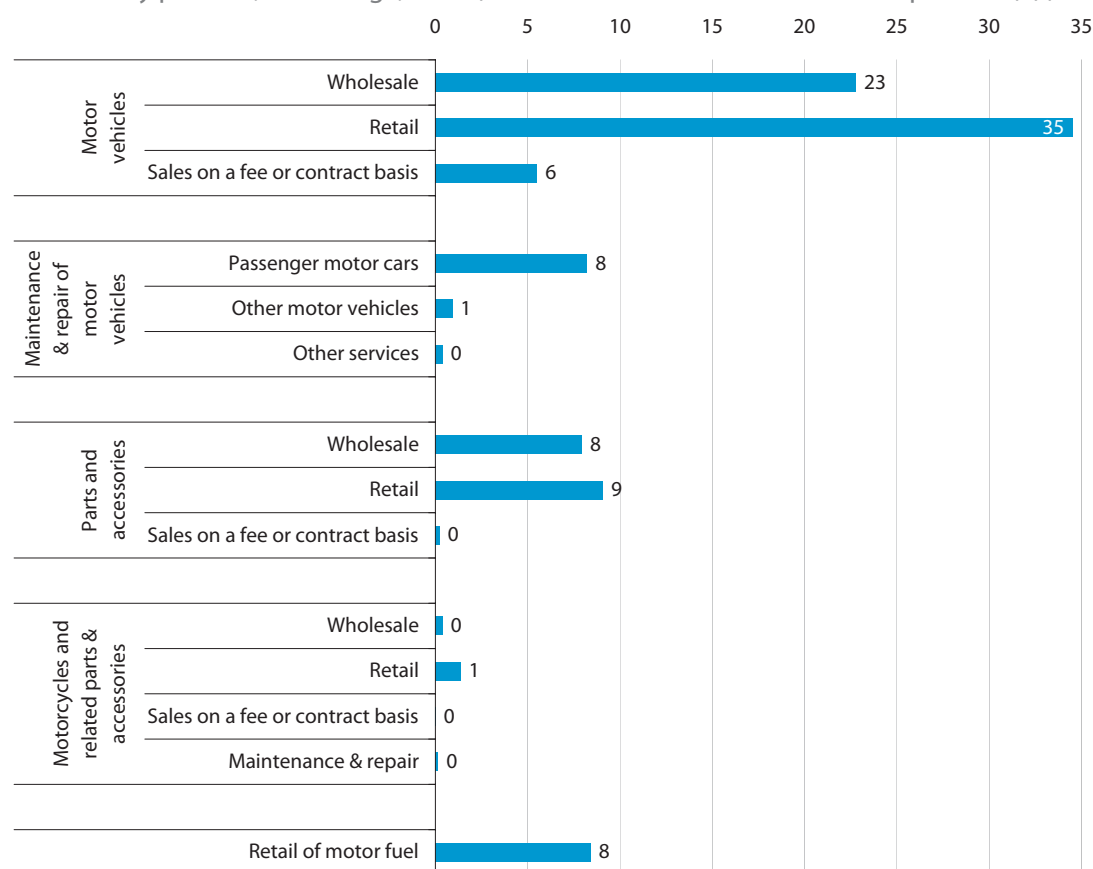
	Value added		Persons employed	
	Non-financial business economy (1)	Motor trades	Non-financial business economy	Motor trades
1 to 9 persons employed	21.0	28.7	29.7	42.6
10 to 49 persons employed	18.9	29.1	20.7	29.1
50 to 249 persons employed	17.8	21.0	17.0	16.5
250 or more persons employed	42.1	21.2	32.6	11.8

(1) 1 to 9 persons employed and 50 to 249 persons employed, 2005.

Source: Eurostat (SBS)

Figure 17.3: Motor trades (NACE Division 50)

Turnover by product, EU average, 2005 (% of total turnover for motor trades products) (1)



(1) Average based on data for Belgium, Germany, Estonia, Ireland, Spain, France, Cyprus, Latvia, Lithuania, Austria, Portugal, Finland and Sweden.

Source: Eurostat (SBS)

Regional specialisation can be seen in the map presented – based on the employment share of this sector in the whole non-financial business economy. Motor trades share of non-financial business economy employment was highest (at the level of detail shown in the map) in Molise (Italy), reaching 9.3 % of the non-financial business economy workforce. The next six most specialised regions, all with 6.0 % or more of their non-financial business economy workforce in motor trades, included the two regions of Brandenburg (Südwest and Nordost) in Germany and the French islands of Réunion, Guadeloupe and Martinique, as well as Guyane. The least specialised region was inner London (United Kingdom), where motor trades contributed just 0.8 % of the non-financial business economy workforce, around half the share of the three next least specialised regions – which were all in Slovakia.

Short-term statistics provide a picture of the development of the motor trades sector in the EU-27 over approximately ten years, in terms of turnover and employment indices. The annual growth rate for the EU-27's motor trades turnover index (in current prices) was never lower than 1.8 % between 1998 and 2007, and reached a high of 5.7 % in 2004 and 2006. From 2000 to 2007 the annual average turnover growth rate in motor trades was 4.8 %, slightly below the non-financial services (NACE Sections G to I and Divisions 72 and 74) average of 5.3 %, due mainly to slower growth in motor trades in the years 2005 to 2007. The index of employment for motor trades was stable or increased each year from 1998 to 2007. Motor trades averaged employment growth of 1.2 % per annum during the nine years from 1998 to 2007, only just over half the 2.3 % average for non-financial services.

An analysis by enterprise size-classes shows that small and medium-sized enterprises (with less than 250 persons employed, namely SMEs) generated close to four fifths (78.8 %) of the EU-27's motor trades value added and employed close to nine tenths (88.2 %) of the workforce in 2006. Micro and small motor trades enterprises (with between 1 and 49 persons employed) were of particular note, as these enterprises contributed close to three fifths (57.8 %) of sectoral value added in the EU-27, a proportion that was only exceeded in construction and real estate activities when considering all of the non-financial business economy NACE divisions.

Focus on motor trade products

A five-yearly analysis of turnover by product permits a more detailed analysis of motor trades, in particular distinguishing wholesale and retail motor trades, as well as other types of services. Average figures are presented on the basis of information for the 13 Member States for which data are available⁽⁴⁾. Retail sales accounted for a larger proportion of turnover than wholesale sales for motor vehicles, for parts and accessories, and for motorcycles. Care should be taken with the data related to sales of motor vehicles on a fee or contract basis: this was just over 5 % of the total turnover of motor trades products, but nearly all of this was recorded in Belgium suggesting a particular retail model for motor vehicles distribution in Belgium – when excluding Belgium from the average, the share of this type of sale fell to less than 1 %.

⁽⁴⁾ Belgium, Germany, Estonia, Ireland, Spain, France, Cyprus, Latvia, Lithuania, Austria, Portugal, Finland and Sweden.

Employment characteristics

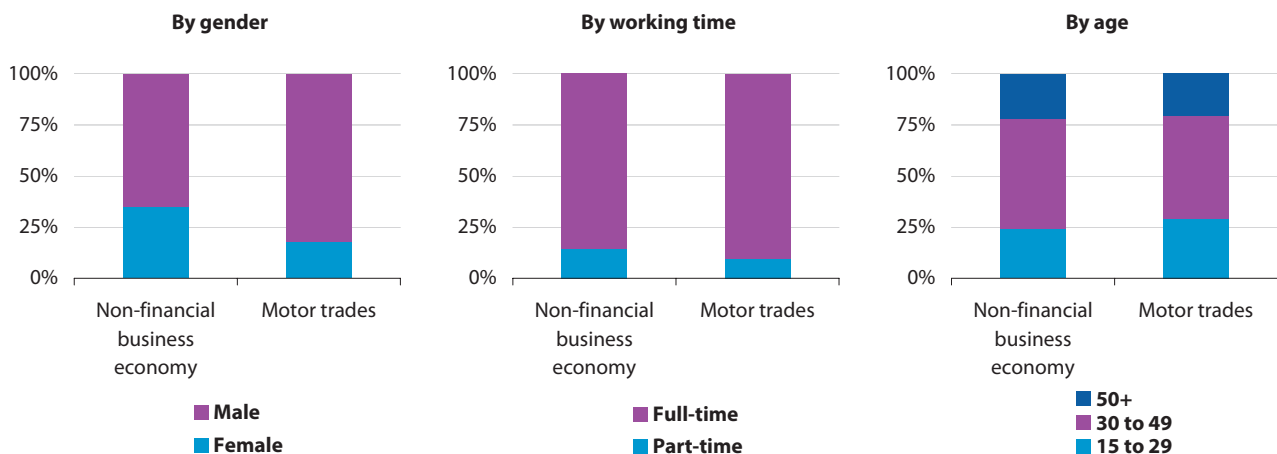
The sector showed atypical employment characteristics compared with both the other distributive trades activities and with the non-financial business economy as a whole, particularly concerning the importance of younger workers, and to a lesser extent the share of male workers.

According to Labour Force Survey data for motor trades in 2007, men represented 81.9 % of the EU-27's workforce, 17.0 points above the corresponding share for the non-financial business economy average. The high proportion of men that were employed in the motor trades sector was apparent across all the Member States; the lowest share of 74.7 % was recorded for Slovenia.

Turning to an analysis by age, those aged between 15 and 29 were relatively over represented in motor trades compared with the non-financial business economy average in 2007: in motor trades 29.0 % of the EU-27's workforce was in this age bracket compared with 24.3 % for the non-financial business economy as a whole. As such, the motor trades sector had the third highest share of younger workers across all of the NACE divisions in the non-financial business economy, and the third lowest (50.4 %) share of workers aged 30 to 49.

Slightly more than nine tenths of all persons employed in the EU-27's motor trade sector in 2007 worked full-time (90.5 %), above the non-financial business economy average (85.7 %). Only in six of the Member States was the incidence of full-time work lower in motor trades than the

Figure 17.4: Motor trades (NACE Division 50)
Employment characteristics, 2007



Source: Eurostat (LFS)

non-financial business economy average, and in all of these cases the difference was less than 1.5 percentage points.

Expenditure, productivity and profitability

The EU-27's motor trades sector recorded tangible investment to the value of EUR 22.7 billion in 2006, equivalent to 2.2 % of the tangible investment made in the whole of the non-financial business economy, less than this sector's share of value added. The investment rate (the percentage ratio of investment to value added) was 14.0 % for the motor trades sector, 4.3 percentage points below the average for the non-financial business economy.

In 2006, the share of purchases of goods and services in total operating expenditure for motor trades in the EU-27 was 92.8 %, and the corresponding share of personnel costs 7.2 %. This high share for goods and services reflects the high purchases and turnover associated with all distributive trades (NACE Section G) activities, which generally buy and resell products without transformation. To put this in perspective, the share of personnel costs in the motor trades sector was less than half the average for the non-financial business economy as a whole (16.1 %), and was the fourth lowest share among all NACE divisions in the non-financial business economy with 2005 or 2006 data available. The retail sale of automotive fuel subsector recorded a particularly

low share of personnel costs, just 4.0 %, while the corresponding share for the motor vehicles and motorcycles distribution subsector was 7.7 %.

Apparent labour productivity in the EU-27's motor trades was EUR 38.1 thousand per person employed and average personnel costs were EUR 25.6 thousand per employee. The level of both of these indicators was more than 10 % below the non-financial business economy average. When combined to produce wage adjusted labour productivity, however, the ratio for motor trades (148.8 %) was only slightly below that for the non-financial business economy as a whole (151.1 %). The two subsectors showed quite different values for these three indicators, with the retail sale of automotive fuel recording lower apparent labour productivity, much lower average personnel costs, and therefore a higher wage adjusted labour productivity.

The gross operating rate (the ratio of gross operating surplus to turnover) in the EU-27's motor trades sector was 5.4 % in 2006, half the average for the non-financial business economy. As such, the motor trades sector recorded the fourth lowest rate among all the non-financial business economy NACE divisions. The relatively high turnover inherent in the retail sale of automotive fuel subsector resulted in a particularly low gross operating rate of just 4.0 % for this subsector, compared with a rate of 5.6 % for the motor vehicles and motorcycles distribution subsector.

Table 17.4: Motor trades (NACE Division 50)
Expenditure, productivity and profitability, EU-27, 2006

	(EUR million)			(EUR thousand per person)		(%)	
	Personnel costs	Purchases of goods & services	Investment in tangible goods	Apparent labour productivity	Average personnel costs	Wage adjusted labour productivity	Gross operating rate
Motor trades	89 922	1 154 734	22 698	38.1	25.6	148.8	5.4
Motor vehicles and motorcycles distribution	83 079	990 544	20 664	39.5	26.9	146.8	5.6
Retail sale of automotive fuel	6 844	164 190	2 035	27.8	16.3	171.1	4.0

Source: Eurostat (SBS)

17.1: Motor vehicles and motorcycles distribution

These activities cover the wholesale, retail and commission sale of new and used motor vehicles (NACE Group 50.1), parts and accessories (NACE Group 50.3), as well as motorcycles (part of NACE Group 50.4). Note that motor vehicles include not just passenger cars, but also other passenger vehicles, lorries, trailers and caravans.

This subchapter also covers the maintenance and repair of motor vehicles (NACE Group 50.2) and motorcycles (the remainder of NACE Group 50.4). This includes all types of repairs (mechanical, bodywork and electrical), spraying and painting, regular servicing, as well as the installation of replacement parts and accessories. Equally, the data presented cover tyre repair and fitting, towing, roadside assistance and car cleaning services. The renting of motor vehicles is not covered (see Subchapter 23.2).

The market for vehicles and motorcycles distribution is divided into different segments: passenger cars, motorcycles and caravans are often purchased by households, while large-scale business customers sometimes buy cars directly from manufacturers. However, business customers dominate the market for commercial vehicles and lorries.

Taxes can influence demand for motor vehicles and motorcycles, including taxes for the registration of a vehicle, as well as annual circulation taxes. The demand for new passenger cars is also closely linked to the general health of the economy, and the sharp decline in overall economic activity witnessed at the time of writing has been reflected in considerable falls in sales of new cars – as shown by the development over time of the number of new car registrations, which indicates a strong downward movement since the end of the third quarter of 2007.

In terms of the environment, the EU strategy for reducing emissions from cars has been based on voluntary commitments by car manufacturers, legislative controls, consumer information (car labelling) and fiscal measures to encourage purchases of more fuel-efficient cars.

Table 17.5: Motor vehicles and motorcycles distribution

New registrations of passenger cars in Western Europe by selected brand, 2007 (1)

Main brands	Units	Mkt. share (%)
Total	18 723 088	100.0
VOLKSWAGEN	1 867 716	10.0
FORD	1 582 731	8.5
RENAULT	1 575 287	8.4
OPEL	1 496 035	8.0
PEUGEOT	1 304 490	7.0
FIAT	1 225 398	6.5
CITROEN	1 165 363	6.2
TOYOTA	1 019 925	5.4
MERCEDES	1 010 712	5.4
BMW	706 986	3.8
AUDI	663 729	3.5
SKODA	491 868	2.6
NISSAN	409 571	2.2
SEAT	393 163	2.1
HYUNDAI	315 760	1.7
HONDA	314 103	1.7
SUZUKI	291 490	1.6
VOLVO	266 740	1.4
KIA	259 326	1.4
MAZDA	248 385	1.3
CHEVROLET	220 647	1.2
MITSUBISHI	188 705	1.0
DACIA	180 615	1.0
IVECO	155 313	0.8
MINI	144 928	0.8
ALFA ROMEO	144 789	0.8
LANCIA	121 735	0.7
Others	957 578	5.1

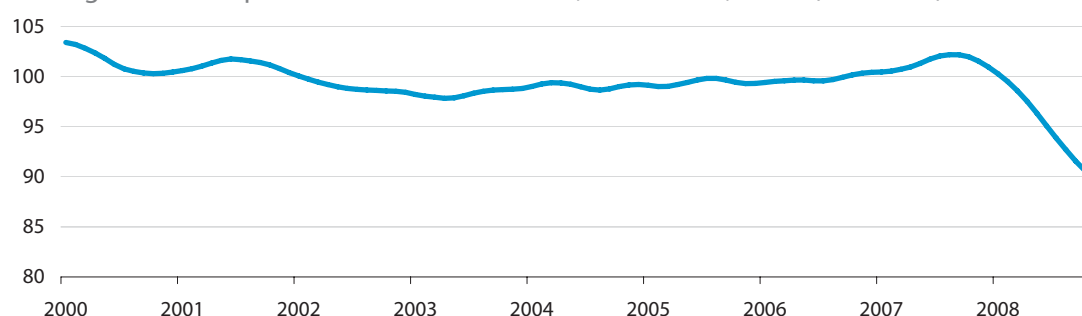
(1) EU-25 and EFTA.

Source: ACEA, <http://www.acea.be>

According to the European Commission's latest report⁽⁵⁾ on car prices, based on figures from the beginning of 2008, pre-tax prices in the EU-27 were lowest in Denmark on average, followed by Estonia. According to the same source, between January 2007 and January 2008, car prices (reflecting actual prices paid by consumers, including VAT and registration taxes) increased by just 0.2 % in the EU-27, well below the overall average for consumer prices. Among the large markets (in terms of volume), car prices increased by 2.5 % in France (in part due to tax changes), 1.1 % in Germany and 0.9 % in Italy. Spain (-0.8 %) and the United Kingdom (-1.1 %) recorded a fall in average car prices.

(5) See http://ec.europa.eu/comm/competition/sectors/motor_vehicles/prices/report.html.

Figure 17.5: Motor vehicles and motorcycles distribution
First registrations of private and commercial cars, trend index, EU-27 (2005=100)



Source: Eurostat (ST5)

Structural profile

The EU-27's motor vehicles and motorcycles distribution sector (NACE Groups 50.1 to 50.4) generated EUR 147.8 billion of value added in 2006 from turnover of over EUR 1.1 trillion. Some 3.7 million persons were employed by the 734.4 thousand enterprises in the motor vehicles and motorcycles distribution sector. In value added terms, this sector accounted for 91.4 % of the value added in motor trades (NACE Division 50), and 88.2 % of the persons employed.

Alone, the sale of motor vehicles (NACE Group 50.1) generated just under three fifths (58.8 %) of the motor vehicles and motorcycles distribution value added, while the maintenance and repair of motor vehicles (NACE Group 50.2) contributed close to one quarter of the total (24.4 %). The same two subsectors were the main contributors to the sector's employment, although the share recorded by the sale of motor vehicles (43.9 %) was considerably less than its value added share,

while that contributed by the maintenance and repair of motor vehicles (36.7 %) was consequently higher. A comparison of these shares indicates the different characteristics of the activities, particularly between the sale of motor vehicles which concerns the sale of expensive capital goods and the maintenance and repair of motor vehicles which provides labour-intensive services.

Germany and the United Kingdom were the two largest Member States in the motor vehicles and motorcycles distribution sector in terms of value added and employment in 2006. While together they accounted for less than one third of the EU-27's employment (32.7 %), their combined value added share was close to half (46.5 %) the EU-27 total. In particular, Germany had a very high level of value added in this sector, resulting in it being the second most specialised Member State⁽⁶⁾ in terms of this sector's contribution to non-financial business economy value added, exceeded only by Latvia.

⁽⁶⁾ Bulgaria, Cyprus, Poland and Romania, 2005; Malta and the Netherlands, not available.

Table 17.6: Motor vehicles and motorcycles distribution (NACE Groups 50.1, 50.2, 50.3 and 50.4)
Structural profile, EU-27, 2006

	Enterprises (thousand)	Turnover (EUR million)	Value added (EUR million)	Persons employed (thousand)	Share in total (%)	
					Value added	Persons employed
Motor vehicles & motorcycles distribution	734.4	1 148 720	147 819	3 740.2	100.0	100.0
Sale of motor vehicles	187.8	879 976	86 867	1 641.8	58.8	43.9
Maintenance & repair of motor vehicles	409.6	115 691	36 066	1 373.7	24.4	36.7
Sale of motor vehicle parts & accessories (1)	100.0	128 223	21 444	619.3	14.5	16.6
Motorcycles sale, maintenance & repair (1)	37.0	24 830	3 442	105	2.3	2.8

(1) Number of enterprises, rounded estimate based on non-confidential data.

Source: Eurostat (SBS)

Figure 17.6: Motor vehicles and motorcycles distribution (NACE Groups 50.1, 50.2, 50.3 and 50.4)
Relative weight within motor vehicles and motorcycles distribution, EU-27, 2006 (%)



Source: Eurostat (SBS)

Table 17.7: Motor vehicles and motorcycles distribution (NACE Groups 50.1, 50.2, 50.3 and 50.4)
Structural profile: ranking of top five Member States in terms of value added and persons employed, 2006

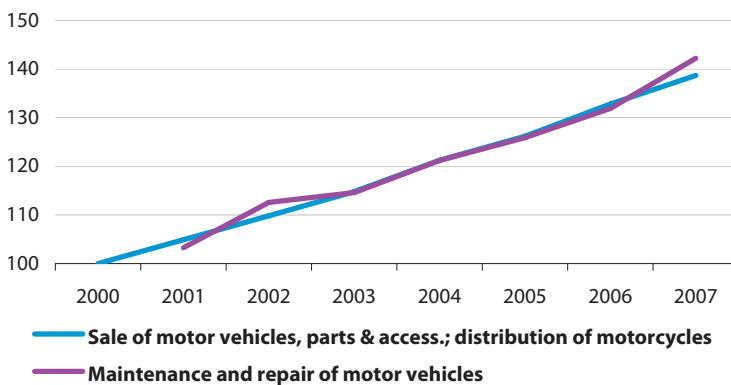
	Highest value added (1)			Largest number of persons employed (1)			Most specialised: share in non-financial business economy (%) (2)	
	Country	(EUR million)	(% of EU-27)	Country	(thousand)	(% of EU-27)	Country	Value added
1	Germany	37 620	25.5	Germany	670.0	17.9	Latvia	3.4
2	United Kingdom	30 985	21.0	United Kingdom	552.8	14.8	Germany	3.3
3	France	17 799	12.0	France	432.9	11.6	Greece	3.3
4	Italy	13 228	8.9	Italy	420.2	11.2	Lithuania	2.9
5	Spain	13 009	8.8	Spain	354.2	9.5	Estonia	2.9

(1) Malta, not available; Bulgaria and Poland, 2005.

(2) Malta and the Netherlands, not available; Bulgaria, Cyprus, Poland and Romania, 2005.

Source: Eurostat (SBS)

Figure 17.7: Motor vehicles and motorcycles distribution (NACE Groups 50.1, 50.2, 50.3 and 50.4)
Index of turnover, EU-27 (2000=100)



Source: Eurostat (STS)

The turnover index (in current prices) is presented for the maintenance and repair of motor vehicles and for other activities. These two subsectors followed a similar development between 2001 and 2007, recording uninterrupted year on year growth within the EU-27. Over this six year period, they both averaged growth of about 5 % per annum.

Expenditure and productivity

Just over two thirds of the EUR 20.7 billion worth of investment made within the EU-27's motor vehicles and motorcycles distribution sector in 2006 was in the sale of motor vehicles subsector, a higher share than this subsector's contribution to value added. The investment rate for motor vehicles and motorcycles distribution as a whole was 14.0 % in 2006, the same rate as for motor trades as a whole. The sale of motor vehicles unsurprisingly had the highest investment rate among the four subsectors, reaching 16.1 %, still below the non-financial business economy average of 18.4 %. The lowest investment rates were recorded for the subsectors of maintenance and repair of motor vehicles and the sale of motor vehicle parts and accessories, both 10.9 %.

Apparent labour productivity per person employed in the EU-27's motor vehicles and motorcycles distribution sector was EUR 39.5 thousand in 2006 and average personnel costs were EUR 26.9 thousand, both slightly above the motor trades average. Apparent labour productivity was particularly high for the sale of motor vehicles subsector, at EUR 52.9 thousand per person employed, which was just over double the level

recorded in the maintenance and repair of motor vehicles subsector. Average personnel costs were also higher in the EU-27's sale of motor vehicles subsector, but less so than for the apparent labour productivity, resulting in a wage adjusted labour productivity ratio (171.2 %) that was higher than that of any of the other subsectors covered in this chapter.

Table 17.8: Motor vehicles and motorcycles distribution (NACE Groups 50.1, 50.2, 50.3 and 50.4) Expenditure and productivity, EU-27, 2006

	(EUR million)			(EUR thousand per person)	
	Personnel costs	Purchases of goods & services	Investment in tangible goods	Apparent labour productivity	Average personnel costs
Motor vehicles & motorcycles distribution	83 079	990 544	20 664	39.5	26.9
Sale of motor vehicles	46 128	783 408	13 990	52.9	30.9
Maintenance & repair of motor vehicles	21 743	79 260	3 929	26.3	22.0
Sale of motor vehicle parts & accessories	13 378	106 579	2 345	34.6	25.0
Motorcycles sale, maintenance & repair	1 829	21 297	400	32.7	25.6

Source: Eurostat (SBS)

17.2: Retail sale of automotive fuel

This subsector covers the retail sale of automotive fuel, lubricating and cooling products for motor vehicles and motorcycles (NACE Group 50.5). It does not include the wholesale trade of automotive fuel.

During 2007 and 2008, the retail price for automotive fuel changed greatly, reflecting the volatility in the price of crude oil. The EU-27 harmonised index of consumer prices for fuels and lubricants for personal transport equipment grew by just over 32 % between January 2007 and its peak in July 2008, but by December 2008 the index had fallen back to a level just below that at the start of 2007.

The retail (pump) price (including VAT and other taxes) was generally lower, in most Member States, for a litre of automotive diesel than for a litre of unleaded petrol, with Belgium and the Netherlands recording diesel prices more than 20 % lower than petrol prices. In contrast, Estonia, Slovakia and the United Kingdom recorded diesel prices 5 % or more higher than petrol prices.

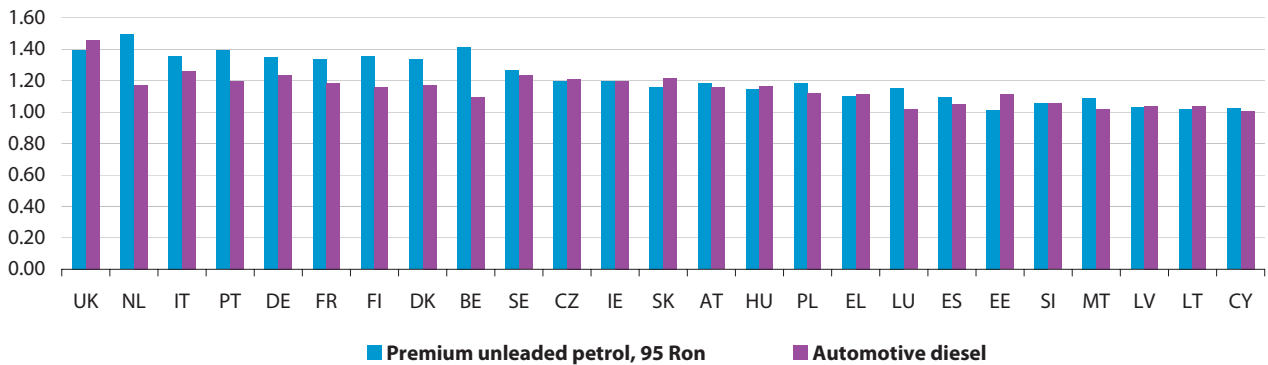
One of the main energy policy targets of the EU is to increase the share of Renewable Energy Sources (RES) in gross inland consumption. In January 2008, the European Commission proposed a Directive on renewable energy sources⁽⁷⁾ that included a target that renewable energy should account for 10 % of transport fuel in each Member State by 2020. Biofuels are among the main renewable energy sources used for transport. The proposed increase in the use of biofuels has led, however, to concerns about its impact on food prices and deforestation, and to proposals to support the development of biofuels that are more sustainable and do not compete with food and animal feed production.

Structural profile

In 2006, there were 73.8 thousand enterprises classified to the retail sale of automotive fuel (NACE Group 50.5) in the EU-27, less than 10 % of all motor trades enterprises. These enterprises generated EUR 178.0 billion of turnover, from which resulted EUR 14.0 billion of value added, 13.4 % and 8.6 % of the motor trades (NACE Division 50) total respectively. This sector employed half a million people, 11.8 % of the motor trades workforce.

(7) COM(2008) 19.

Figure 17.8: Retail sale of automotive fuel
At the pump prices of petroleum products, first half of 2008 (EUR/litre) (1)



(1) Countries ranked on average price.

Source: Eurostat (Energy)

Table 17.9: Retail sale of automotive fuel (NACE Group 50.5)
Structural profile: ranking of top five Member States in terms of value added and persons employed, 2006

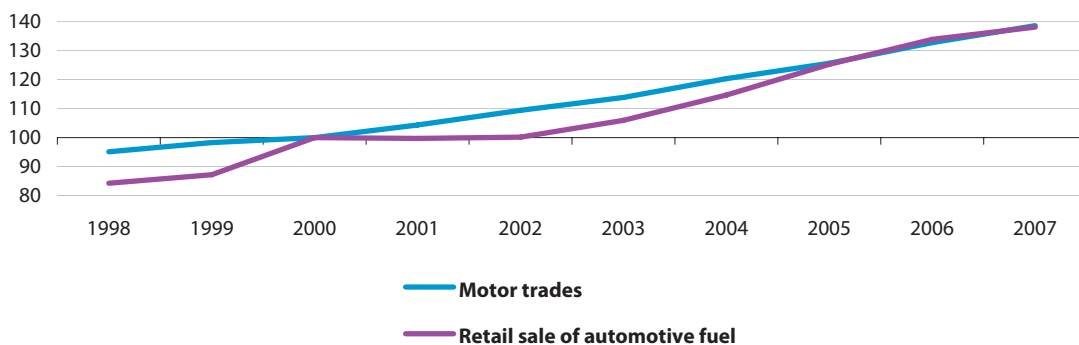
	Highest value added (1)			Largest number of persons employed (1)			Most specialised: share in non-financial business economy (%) (2)	
	Country	(EUR million)	(% of EU-27)	Country	(thousand)	(% of EU-27)	Country	Value added
1	United Kingdom	3 044	21.8	Italy	62.1	12.4	Latvia	1.6
2	Spain	1 978	14.2	Germany	61.8	12.3	Bulgaria	1.4
3	Germany	1 894	13.6	United Kingdom	60.3	12.0	Lithuania	1.0
4	Italy	1 893	13.5	Spain	57.4	11.4	Greece	0.7
5	France	797	5.7	Poland	42.1	8.7	Romania	0.7

(1) Malta, not available; Bulgaria and Poland, 2005.

(2) Malta and the Netherlands, not available; Bulgaria, Cyprus, Poland and Romania, 2005.

Source: Eurostat (SBS)

Figure 17.9: Retail sale of automotive fuel (NACE Group 50.5)
Index of turnover, EU-27 (2000=100)



Source: Eurostat (STS)

The United Kingdom recorded EUR 3.0 billion of value added in the retail sale of automotive fuel in 2006, some 21.8 % of the EU-27 total. Note that the contribution of France to the EU-27 total for this sector was as low as 5.7 % in terms of value added, reflecting the fact that in France (and a number of other Member States) a large proportion of fuel is sold through service stations that belong to retailers classified within retail trade (NACE Division 52) rather than the retailing of automotive fuels.

The development of the EU-27 turnover index for the retail sale of automotive fuels was not as steady as that of motor trades as a whole, particularly in the period between 1998 and 2005. The retail sale of automotive fuels grew strongly in 1999 before flattening out between 2000 and 2002, at a time of continued growth across motor trades as a whole. This was followed by four years of much stronger growth through to 2005. It should be noted that this turnover index is only provided in current prices and therefore reflects price changes. As such, changes in oil prices have to be considered when analysing this data, as the volume of automotive fuel may have fallen while sales in value terms rose (due to significant price increases).

Expenditure and productivity

Purchases of goods and services represented 96.0 % of total operating expenditure for the EU-27's retail sale of automotive fuel, and correspondingly personnel costs accounted for the remaining 4.0 %. This share of personnel costs was the second lowest of all NACE groups within the non-financial business economy for which 2005 or 2006 data are available, higher only than for petroleum refining.

The wage adjusted labour productivity of the EU-27's automotive fuel retailing sector was 171.1 % in 2006, practically the same as recorded for the sale of motor vehicles subsector (see Subchapter 17.1). This relatively high ratio resulted from a relatively low apparent labour productivity of EUR 27.8 thousand per person employed, and a particularly low average personnel cost of EUR 16.3 thousand per employee, which was the eighth lowest of the non-financial business economy NACE groups.

Table 17.10: Motor trades (NACE Division 50)
Main indicators, 2006 (1)

	BE	BG	CZ	DK	DE	EE	IE	EL	ES	FR	IT	CY	LV	LT
Enterprises	18.8	9.2	30.6	8.5	84.6	1.8	5.8	36.7	76.3	83.1	147.7	3.1	2.9	7.4
Persons employed	81.7	52.0	92.7	63.2	731.8	12.7	42.0	108.9	411.5	458.3	482.2	9.2	21.9	46.9
Turnover	72 001	3 381	16 664	36 689	196 877	2 777	18 555	23 382	121 305	168 547	178 107	1 706	2 821	3 883
Production	10 164	672	3 589	20 174	58 528	521	2 560	4 842	29 427	39 432	54 425	403	744	777
Purch. of goods & serv.	67 588	3 213	15 751	19 795	157 063	2 619	16 961	20 964	109 644	149 294	166 102	1 480	2 530	3 614
Value added	4 398	298	1 337	2 940	39 514	251	1 760	2 785	14 987	18 596	15 122	235	435	392
Personnel costs	2 602	100	750	1 975	18 027	127	1 107	1 258	8 947	15 065	7 752	158	112	197
Average personnel costs	42.3	2.2	11.1	34.2	28.1	10.4	29.3	20.6	25.6	34.7	28.6	21.5	5.1	4.7
Gross operating surplus	1 797	198	587	966	21 487	124	652	1 517	6 040	3 531	7 370	76	323	195
Gross investment	1 792	162	382	525	2 860	55	510	548	2 884	1 932	1 692	38	138	156
Apparent labour prod.	53.9	5.7	14.4	46.5	54.0	19.9	41.9	25.6	36.4	40.6	31.4	25.6	19.9	8.4
Wage adj. labour prod.	127.2	256.0	129.6	135.9	192.3	191.3	142.9	124.2	142.4	117.0	109.5	119.0	386.5	177.8
Gross operating rate	2.5	5.9	3.5	2.6	10.9	4.5	3.5	6.5	5.0	2.1	4.1	4.5	11.4	5.0
Investment rate	40.7	54.4	28.6	17.8	7.2	21.8	29.0	19.7	19.2	10.4	11.2	16.3	31.7	39.7
	LU	HU	MT	NL	AT	PL	PT	RO	SI	SK	FI	SE	UK	NO
Enterprises	0.8	19.2	:	21.9	10.5	75.0	36.0	15.5	3.8	1.4	9.7	21.0	71.3	8.9
Persons employed	8.4	82.1	:	153.0	89.1	258.2	131.8	111.0	16.2	16.7	41.2	87.3	613.1	58.0
Turnover	5 183	16 414	:	68 279	27 661	23 911	25 328	11 187	6 429	4 222	20 747	35 729	229 342	22 972
Production	658	2 679	:	18 005	7 087	10 022	4 508	2 636	1 000	727	3 621	7 412	64 777	7 165
Purch. of goods & serv.	4 760	15 430	:	58 318	24 252	21 228	23 746	10 183	5 978	3 931	19 130	31 977	194 285	19 928
Value added	414	1 038	:	6 365	3 389	2 594	2 343	1 161	430	315	2 121	4 023	34 029	3 118
Personnel costs	284	585	:	3 976	2 611	949	1 737	417	268	147	1 368	2 906	16 279	2 237
Average personnel costs	35.7	8.2	:	30.4	32.7	5.7	13.7	3.9	19.5	8.9	37.0	39.3	29.3	40.9
Gross operating surplus	130	453	:	2 410	777	1 644	607	744	162	168	800	1 117	17 750	881
Gross investment	47	306	:	895	374	504	523	885	160	173	292	842	3 837	377
Apparent labour prod.	49.3	12.7	:	41.6	38.0	10.0	17.8	10.5	26.5	18.9	51.4	46.1	55.5	53.8
Wage adj. labour prod.	138.3	154.5	:	136.7	116.2	177.5	129.7	271.4	135.4	212.5	139.1	117.1	189.6	131.3
Gross operating rate	2.5	2.8	:	3.5	2.8	6.9	2.4	6.7	2.5	4.0	3.9	3.1	7.7	3.8
Investment rate	11.3	29.4	:	14.1	11.0	19.4	22.3	76.2	37.2	55.0	13.8	20.9	11.3	12.1

(1) Poland, 2005; Bulgaria, investment rate, 2005; unless otherwise stated, values refer to EUR million; number of enterprises and number of persons employed are given in thousands; average personnel costs and apparent labour productivity are given in EUR thousand per person; wage adjusted labour productivity, gross operating rate and investment are ratios expressed as percentages.

Source: Eurostat (SBS)