

# Retail trade: companies and products

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## Statistics in focus

### INDUSTRY, TRADE AND SERVICES

THEME 4 – 19/2001

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### Main results:

- Three-quarters of foodstuffs are sold in non-specialised stores (supermarkets, hypermarkets etc.).
- Three-quarters of non-food products are sold in specialised stores.
- The market share of non-specialised stores is lower in Spain and Portugal than in other European countries. This is particularly true of food.
- The non-specialised sector is more highly concentrated than the other retail sectors.

**Table 1: Non-specialised stores in retail sale especially  
in Northern Europe**

NACE Rev.1		52.1	52.11	52.12	52.2	52.3	52.4	52	
		<i>in whose sales food predominates</i>			Specialised food stores	Pharmaceuticals and perfumes	Other retail sales in specialised stores		
		Non-specialised stores	other	Other			Total		
Total	Total retail sales	43,5	37,9	5,6	6,7	7,2	35,9	6,7	100
	Retail sales of food	77,1	74,8	2,3	17,4	0,4	1,7	3,4	100
pt	Total retail sales	25,6	24,5	1,1	10,4	8,3	53,1	2,6	100
	Retail sales of food	67,5	66,7	0,9	30,1	0,0	2,1	0,3	100
es	Total retail sales	34,8	29,5	5,3	16,4	8,7	36,5	3,7	100
	Retail sales of food	56,1	54,3	1,8	40,7	0,1	0,2	3,0	100
dk	Total retail sales	50,9	28,8	22,1	5,8	5,0	36,0	2,4	100
	Retail sales of food	87,4	56,2	31,2	12,1	0,0	0,0	0,4	100
nl	Total retail sales	32,5	32,5	0,0	8,8	3,6	49,7	5,4	100
	Retail sales of food	72,6	72,6	0,0	21,1	0,5	0,2	5,6	100
de	Total retail sales	40,1	34,0	6,1	4,5	9,2	35,7	10,5	100
	Retail sales of food	82,4	80,1	2,2	11,6	0,9	0,5	4,6	100
fr	Total retail sales	51,4	49,6	1,8	4,2	9,0	29,9	5,6	100
	Retail sales of food	83,1	82,8	0,3	12,2	0,0	0,6	4,1	100
no	Total retail sales	46,2	43,9	2,3	5,1	4,4	41,7	2,5	100
	Retail sales of food	85,9	85,8	0,1	13,4	0,0	0,1	0,6	100
uk	Total retail sales	46,6	37,7	9,0	7,1	3,8	36,5	6,0	100
	Retail sales of food	76,1	73,7	2,4	16,7	0,3	4,9	2,0	100

Source : SBS year. 1997

nl : NACE Rev.1, 52.12 and 52.3 not included in the total  
de : NACE Rev. 1, 52.7 not included in the total

*The population covered is Portugal, Spain, Denmark, Netherlands, Germany, France, Norway and United Kingdom. The reference year is 1997.*



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## Three-quarters of food sold in non-specialised stores

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Table 1 shows that non-specialised stores (NACE Rev.1, 52.1), which account for less than half (44%) of all sales in Europe, account for more than three-quarters (77%) of turnover in food. Although these stores are, by definition, not specialised, food "predominates" in their sales. The share of the food market held by "non-specialised stores with food, beverages or tobacco predominating" (NACE Rev.1, 52.11) is 75%, against only 2% for other retail sales in non-specialised stores (NACE Rev.1, 52.12). Stores specialising in food, beverages and tobacco (NACE Rev.1, 52.2) have a market share of 17%.

However, *Table 2* shows that the overall predominance of non-specialised stores varies according to the type of food. For example, the market share of non-specialised stores is 86% for fresh fruit and vegetables, but only 70% for meat and meat products, and for fish, crustaceans and molluscs. Tobacconists have a market share of more than one-third (36%), with 63% accounted for by non-specialists.

### *Food stores specialised ... to varying degrees*

The degree to which stores specialise in the various types of food differs. For any given NACE code (which identifies companies' activities), a specialisation rate can be calculated by expressing the sales of a product as a percentage of total sales by companies with that NACE code (the last line of *Table 2*). For example, companies in NACE Rev.1, 52.21 (retail sale of fruit and vegetables) derive 83% of their turnover from fresh fruit and vegetables. They derive most of the remainder from foods, most notably meat (1%), bread, cakes and confectionery (2%) and drinks (2%).

Similarly, *table 2* shows that both butchers and fishmongers derive more than 90% of their turnover from their principal products. On the other hand, bakers derive only 76% of their turnover from their main products, and 11% from other foods (CPA 52.27).

However, the specialisation rate for specialised stores depends to a large extent on the chosen activity classification. Moreover, sales of products other than the products of specialisation are, as we have seen, primarily sales of other foods. Generally, traders specialising in food are more highly specialised than those specialising in non-food products. For example, traders specialised in perfumes and hardware derive only 72% of their turnover from those products. Selling food may require more specialised skills than retailing other products in specialised stores, which behave more like "generalists".

Tobacconists derive 71% of their turnover from tobacco products, 10% from confectionery and beverages (in equal amounts), and 13% from newspapers and magazines. In addition, only 45% of tobacco is sold in non-specialised stores.

Table 2: Market share of specialised food stores

NACE Rev.1	52,21	52,22	52,23	52,24	52,25	52,26	52,27	52,31	52,32	52,33	52,41	52,42	52,43	52,44	52,45	52,46	52,47	other	total
	Fruit and vegetables	Meat and meat products	Fish, crustaceans and molluscs	Bread, cakes and confectionery	Beverages	Tobacco products	Other food, including dairy products	Pharmaceuticals	Medical and orthopedic products	Perfumes and beauty products	Textiles	Clothing	Shoes and leather goods	Furniture, household equipment	Household electrical appliances, radios and televisions	Hardware, paint and glass	Books, magazines, stationery		100
Share of products in total retail sales	3,7	5,7	1,1	3,4	5,8	2,9	12,7	5,4	0,6	3,3	1,9	9,9	2,5	7,4	5,2	4,5	3,0	21,0	100
Share of sales accounted for by stores specialised in the product	13,6	26,2	26,6	7,0	7,0	72,3	2,9	99,9	83,0	31,9	37,3	58,1	66,0	62,3	58,5	44,4	66,2		
Share of sales accounted for by stores not specialised in the product*	86,4	73,8	73,4	93,0	93,0	27,7	97,1	0,1	17,0	68,1	62,7	41,9	34,0	37,7	41,5	55,6	33,8		
Total	100,0	100,0	100,0	100,0	100,0	100,0	100,0	100,0	100,0	100,0	100,0	100,0	100,0	100,0	100,0	100,0	100,0		100,0
Share of sector sales accounted for by sector products	93,8	96,6	85,6	97,2	94,7	155,4	86,6	99,2	82,2	96,4	95,3	92,8	85,1	88,5	77,0	79,2	85,9		

Source: SBS; year: 1997  
 \* mainly non-specialised stores, but also stores specialising in other products  
 Note: Retail sales of fruit and vegetables represent 3.7% of overall retail sales  
 13.6% of fruit and vegetables are sold in specialised stores and 86.4% are sold in non-specialised stores  
 Stores specialising in fruit and vegetables derive 94% of their turnover from these products  
 population : pt, es, dk, nl, de, fr, no, uk  
 Retail companies: NACE Rev.1, div. 52  
 nl : NACE Rev .1, 52.12 and 52.3 not included in the total  
 de : NACE Rev.1, 52.7 not included in the total

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## Three-quarters of non-food products sold in specialised stores

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The distribution networks of non-food products are dominated by specialised traders. The organisation is therefore completely different from that of foodstuffs, where non-specialised forms of distribution dominate.

*Non-food current consumer goods, household equipment: large market share held by specialised stores*

Table 2 shows that more than 65% of clothing and leather goods are sold in specialised stores, but also that non-specialists have a market share of more than 15% in both cases (the remainder being held by stores specialised in other products). Although non-food, these stores concentrate on their area of specialisation, with more than 80% of their turnover being accounted for by their specialisation or related products. In particular, clothing companies derive 80% of their turnover from clothing and 6% from other textile products.

Only 23% of textile products are sold in stores which specialise in textiles, although the share increases to 51% if clothing stores are included, i.e. 51% of textile products are sold in stores specialised in textiles or clothing. Clothing stores therefore have a bigger share of the market for textiles than textile stores themselves, a fact which illustrates the complexity of the approach by

sector and by branch. Companies marketing textile products derive three-quarters of their sales from those products, 17% from curtains and net curtains and 4% from clothing.

56% of electrical household appliances are sold in specialised stores, 20% in non-specialised stores and 10% in other stores specialising in household equipment. 64% of all television and radio appliances are sold in specialised stores. Traders specialising in domestic electrical appliances and televisions and radios make more than three-quarters (77%) of their sales in this field (with brown goods, i.e. radios and televisions, accounting for slightly more than white goods, i.e. electric household appliances).

The market share of stores specialised in hardware, paints and glass products, is 68%. A feature of this sector is that 4% of hardware merchants' sales are accounted for trade customers, primarily craftsmen. The percentage is highest in Germany, where 7% of hardware, paints and glass are sold to trade customers. It should be borne in mind that only 1.5% of all retail sales are to trade customers.

Just 53% of the market for books, newspapers and stationery is held by booksellers. Tobacconists, non-

specialised stores and mail-order firms control the rest of the market. Booksellers sell 79% of all books, newspapers and stationery and 4% of tobacco.

*Pharmaceuticals: a specialised and regulated sector*

The situation regarding pharmaceutical products is different. The major stores have not been big players in these products, mainly for legal reasons. Thus, dispensing chemists account for 94% of retail sales of pharmaceutical products in Europe. They are not very diversified and derive 92% of their turnover from pharmaceutical products, 3% from orthopaedic articles and 3% from beauty products.

Compared with the pharmaceutical sector, the medical and orthopaedic retail sector is subject to far fewer regulatory constraints. Consequently, the market share of specialised companies is just 40%, mainly because 30% of orthopaedic products are sold by dispensing chemists. In this small sector (which accounts for 0.5% of retail turnover, compared with the 5% accounted for by pharmaceuticals), the specialisation rate is 55%: companies in the sector have diversified into beauty products (18% of their turnover) and pharmaceutical products (6%).

## Non-specialised stores more influential in Northern Europe

The overall market share of non-specialised stores, and their market share for foodstuffs, varies widely from one country to the next. The limited data which are available suggest that non-specialised stores are generally less dominant in the Iberian Peninsula than elsewhere in Europe (this is true of all products, including foodstuffs).

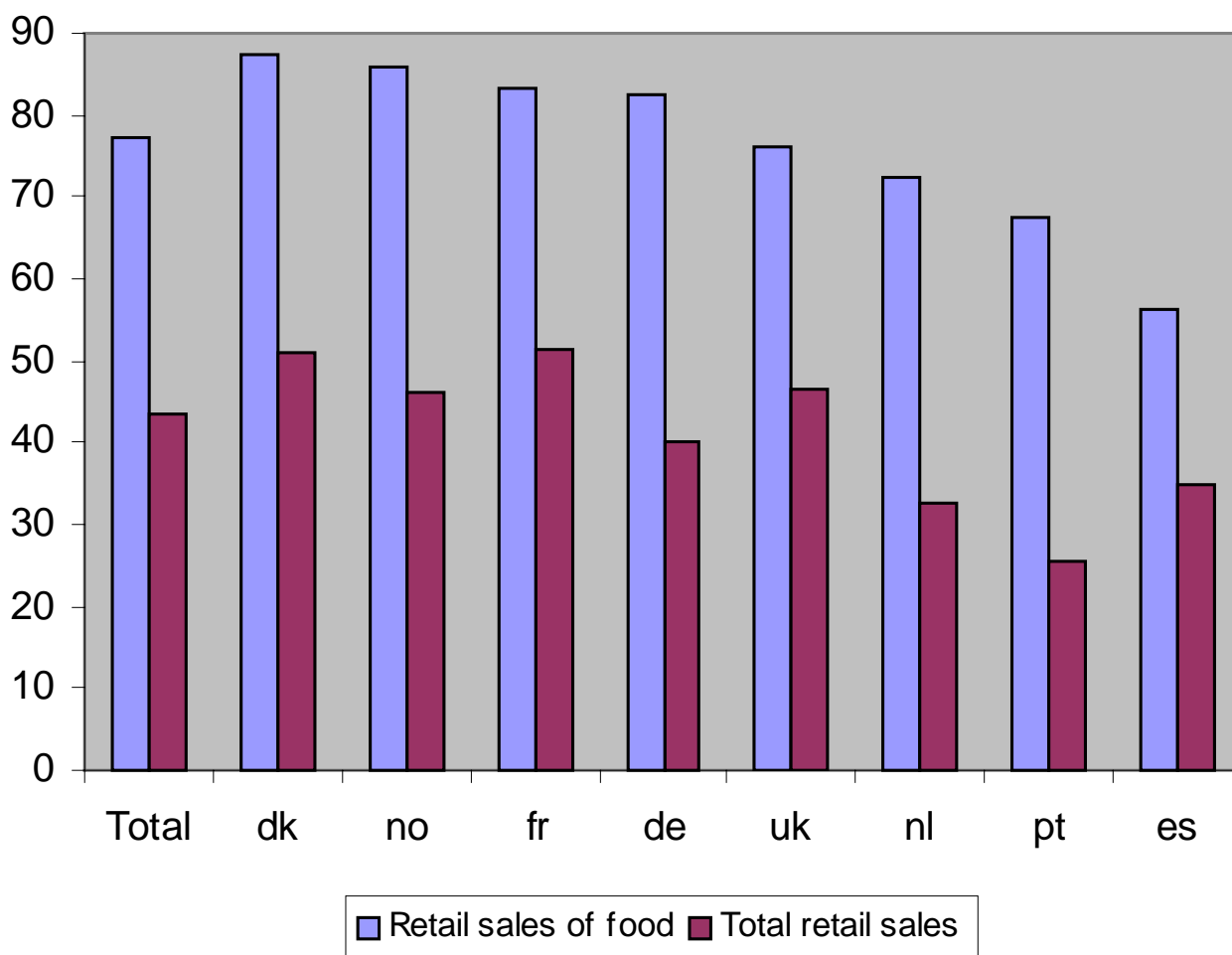
Thus, *Table 1* shows that the share of non-specialised stores in total retail turnover is 51% in France and Denmark as against 35% in Spain and barely

26% in Portugal. The difference is more pronounced in the case of foodstuffs, for which the market share of non-specialised stores is more than 80% in France, Germany, Norway and Denmark, but just 68% in Portugal and 56% in Spain.

In Spain, more than 80% of meat and 74% of fish, crustaceans and molluscs is sold in specialised stores. In the eight countries covered by the study, the market share held by specialised stores for each of these two products is just 30%.

There are some major differences in European distribution networks, although they are much less marked if one compares European countries by the share of food in their retail sales. Food accounts for almost 36% of retail sales in Europe, a figure which does not vary much from one European country to another. The share of foods in retail sales varies within a fairly narrow range: from 31% in Portugal to 39% in Denmark.

Figure 1: Share of sales accounted for by non-specialised stores



Source: SBS, year: 1997

*Non-specialised stores: a more highly concentrated sector*

Most of the very large retailers are found among the non-specialised stores. Thus, Finland and Denmark had ten non-specialised stores generating turnover of more than € 200 million in 1998 (there are about 40 such stores in France).

If we look at a broader range of stores (i.e. not just the very large ones), we find that medium-sized enterprises in Finland and Denmark with a turnover of

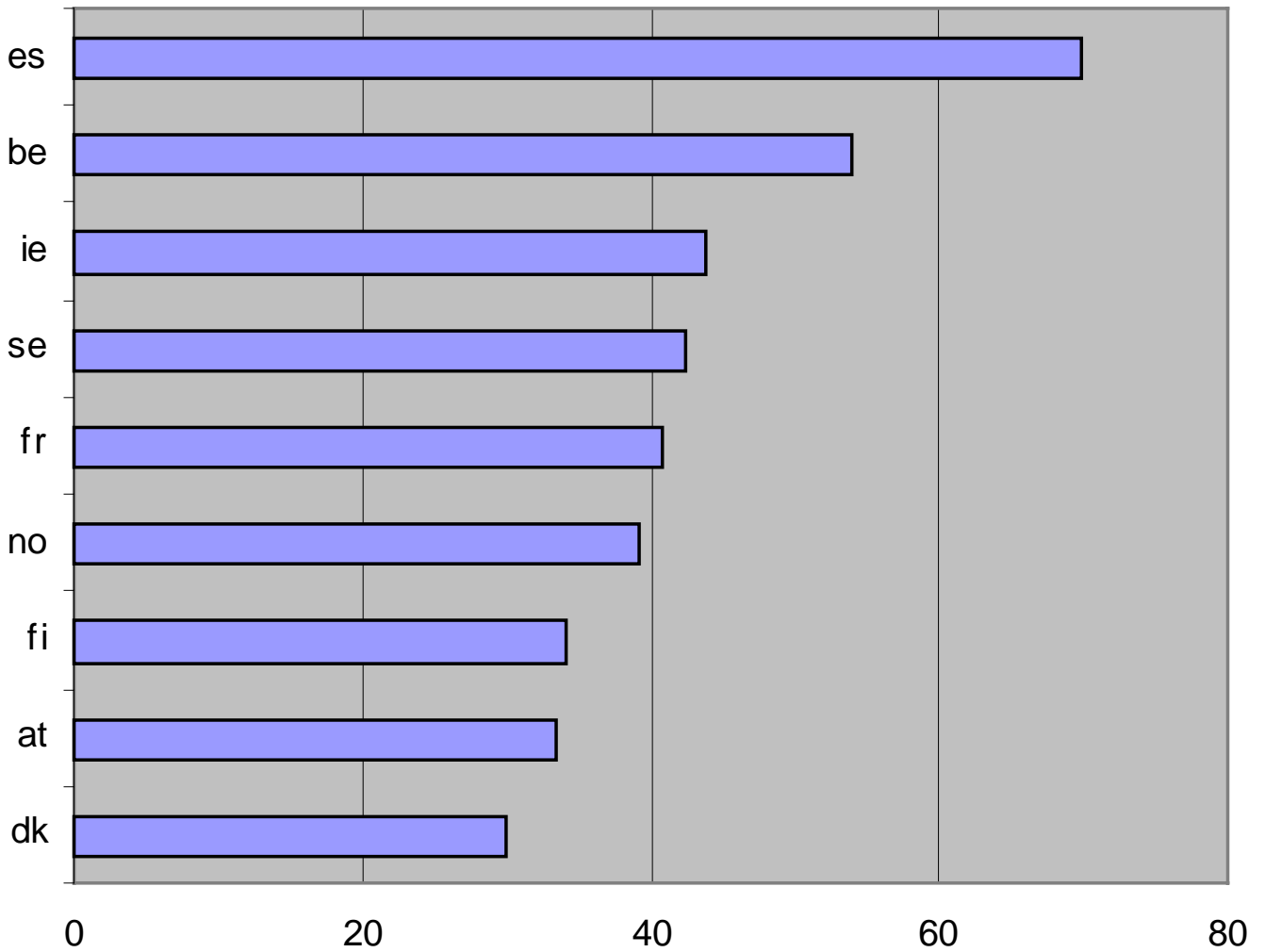
more than € 5 million generate almost 80% of the turnover of non-specialised stores. Among non-specialised stores in France, companies with a turnover of more than € 5 million account for more than 90% of sales. Specialised stores, however, have a much lower concentration rate, with stores exceeding € 5 million in turnover accounting for only 20% of total turnover in non-specialised stores in Denmark, and 13% in France.

The relative dominance of specialised retailing on the Iberian

Peninsula has a structural effect which explains the low concentration of the retail sector there. A sector is concentrated if a small number of traders hold a large market share.

In Spain, for example, 70% of retail personnel work for companies with fewer than 10 employees. On the other hand, the share of employment accounted for by these very small enterprises in Denmark, Austria or Finland is no more than 35%.

**Figure 2: Share in employment (number of persons employed) in the retail sector accounted for by retailers with fewer than 10 employees**



Source: SBS, year: 1998 (except no, se, ie, be, es: 1997)

### Data source: the Structural Business Statistics (SBS) Regulation

The Regulation on structural business statistics provides for the transmission to Eurostat of data on the turnover of trading companies. For the 1997 reference year, the survey covers the retail trade (NACE Rev.1, division 52). This includes companies whose principal activity consists in retailing and repairing household articles. The NACE has two other relevant divisions: companies whose principal activity is the sale, maintenance and repair of motor vehicles (NACE Rev.1, 50), and those whose principal activity is wholesale trade and commission trade (NACE Rev.1, 51).

These data are taken from table sbs \_ ret in field 4 of NewCronos: industry, commerce, services. They make it possible to construct a satellite account at national and European level, i.e. to provide detailed answers to the two following questions:

- What products do retailers sell?
- In what type of store are the products sold (specialised/non-specialised stores, etc.) Strictly speaking, this involves calculating market shares. It should be noted that markets can be affected by regulatory constraints: pharmaceutical products, in particular, are sold almost exclusively by dispensing chemists, with only very few available from larger stores.

A twin-track approach (combining the sector- and product-based approaches) sheds the best light on the distribution networks associated with each product. Non-specialised stores differ from specialised stores as they sell a large variety of goods. This data collection makes it possible to ascertain whether or not products are sold in specialised stores and to measure the degree of specialisation: for example, the share of greengrocers' turnover accounted for by fruit and vegetables. A third advantage is that it shows the range of products marketed in non-specialised stores: in particular, it can be shown that food accounts for a major share of their sales (more than 60% in the countries covered by the study). As regards distribution networks, each country has its peculiarities: in the United Kingdom, for example, almost 6% of fruit and vegetables are sold in stores which specialise in clothing.

This twin-track approach (companies/products) is made easier by the fact that the CPA product classification is based on the NACE activity classification.

Generally speaking, therefore, the field of this study is companies whose principal activity consists in reselling new or used goods, without modification, to private individuals. That is not to say that their clientele does not include trade customers, who in fact account for an average of nearly 1.5% of European retail companies' sales.

### Foodstuffs

The following products are regarded as foods:

CPA 52.21.1: fruit and vegetables

CPA 52.22.1: meat and meat products

CPA 52.23.1: fish, crustaceans and molluscs

CPA 52.24.1: bread, cakes, flour confectionery and sugar confectionery

CPA 52.25.1: beverages

CPA 52.26.1: tobacco products

CPA 52.27.1: other

# Further information:

## ➤ Reference publications:

- Distributive trade statistics, Retail sale not in stores, Joachim Hubertus, Statistics in Focus (SIF) No. 21/2000
- Food retailing in Europe, an activity dominated by non-specialised enterprises, Jan Stensrud SIF No. 29/1999
- Non-food retailing in Europe, specialised retailers lead the sector, Jan Stensrud, SIF No. 30/1999
- Commerce 99, Proceedings of the seminar on distributive trades in Europe, Brussels, 22-23 November 1999, Studies and research

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