

# 2007 Census of Commerce: Results by Industry

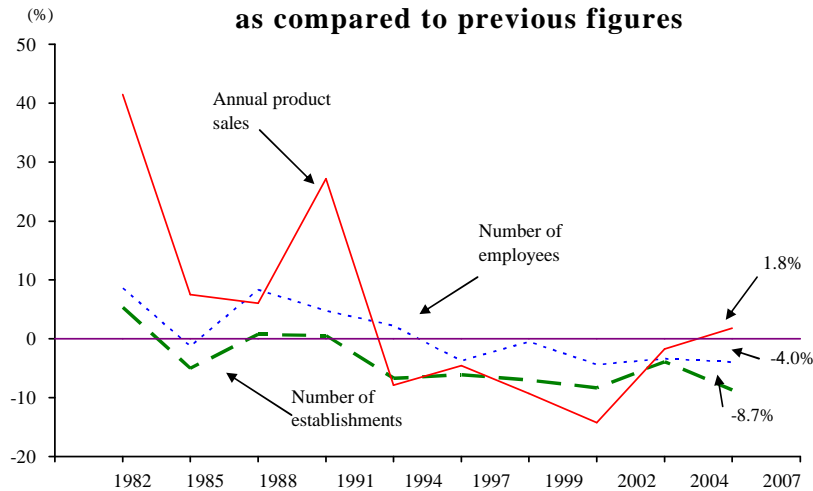
## (Wholesale Trade and Retail Trade)

### Outline of Findings

#### Number of establishments and annual product sales, which had continuously decreased, increased for the first time since the 1991 census

In the Census of Commerce conducted on June 1, 2007, the number of establishments in wholesale trade and retail trade was 1.47 million (down 8.7% compared to the previous census in 2004). Annual product sales were 548 trillion yen (up 1.8% id.), the number of persons engaged (including workers dispatched and accepted from other companies etc.) was 11.69 million (down 5.3% id.) and the number of employees was 11.11 million (down 4.0% id.). Although the number of establishments decreased for the six consecutive censuses since the 1994 census, annual product sales increased for the first time since in six censuses the 1991 census.

#### Trends in the number of establishments, annual product sales and the number of employees as compared to previous figures



(Note 1) The comparison to the previous census calculates to take into consideration a time series due to the addition of captured establishments in the census of 1999.

(Note 2) The number of employees was obtained by adding the number of "sole proprietors", "unpaid family workers", "paid officers" and "regular employees". The number of persons engaged was obtained by adding the number of "employees", "temporary employees" and "workers dispatched from other companies" and subtracting the number of "workers dispatched to other companies"

#### Number of establishments, annual product sales and number of persons engaged in wholesale trade and retail trade

	Number of establishments			Annual product sales			Number of persons engaged			Of which, number of employees (10,000 persons)	Composition ratio (%)	Comparison (%)
	2004	2007	Comparison (%)	(100 million yen)	2004	2007	Comparison (%)	(10,000 persons)	2004			
<b>Total for commerce</b>												
2004	1,613,318	100.0	-3.9	538,775,810	100.0	-1.8	12,333,889	100.0	-2.2	11,565,953	100.0	-3.4
2007	1,472,658	100.0	-8.7	548,237,119	100.0	1.8	11,685,048	100.0	-5.3	11,105,669	100.0	-4.0
<b>Wholesale trade</b>												
2004	375,269	23.3	-1.1	405,497,180	75.3	-1.9	3,957,154	32.1	-5.2	3,803,652	32.9	-5.0
2007	334,799	22.7	-10.8	413,531,671	75.4	2.0	3,622,852	31.0	-8.4	3,526,306	31.8	-7.3
<b>Retail trade</b>												
2004	1,238,049	76.7	-4.8	133,278,631	24.7	-1.4	8,376,735	67.9	-0.8	7,762,301	67.1	-2.6
2007	1,137,859	77.3	-8.1	134,705,448	24.6	1.1	8,062,196	69.0	-3.8	7,579,363	68.2	-2.4

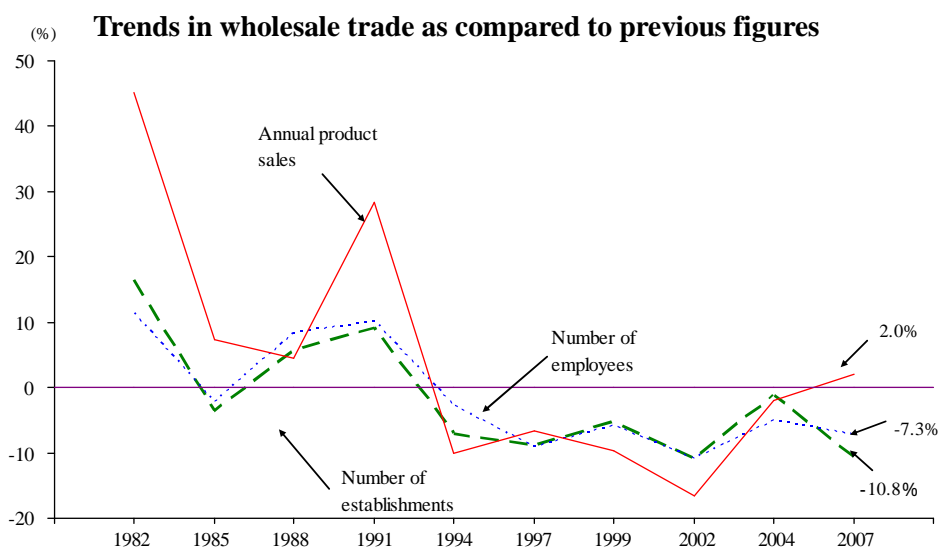
(Note 1) Annual product sales in the 2007 census represent sales performance in the FY2006.

(Note 2) Starting with the 2007 census, establishments in station wickets and in toll roads became applicable to the census.

## Wholesale Trade

**Both number of establishments and number of persons engaged decreased, annual product sales increased**

1. In wholesale trade, the number of establishments was 330,000 (down 10.8% as compared to the previous census) and decreased for the six consecutive censuses since the 1994 census. On the other hand, annual product sales were 414 trillion yen (up 2.0% id.) and increased for the first time in six censuses since the 1991 census. The number of persons engaged, including “ workers dispatched from other companies ” was 3.62 million (down 8.4% id.). The number of employees was 3.53 million (down 7.3% id.).



2. Annual product sales increased in eight categories of industry such as “Mineral and metals” etc., for which increased significantly due to a rise in the price of raw materials.

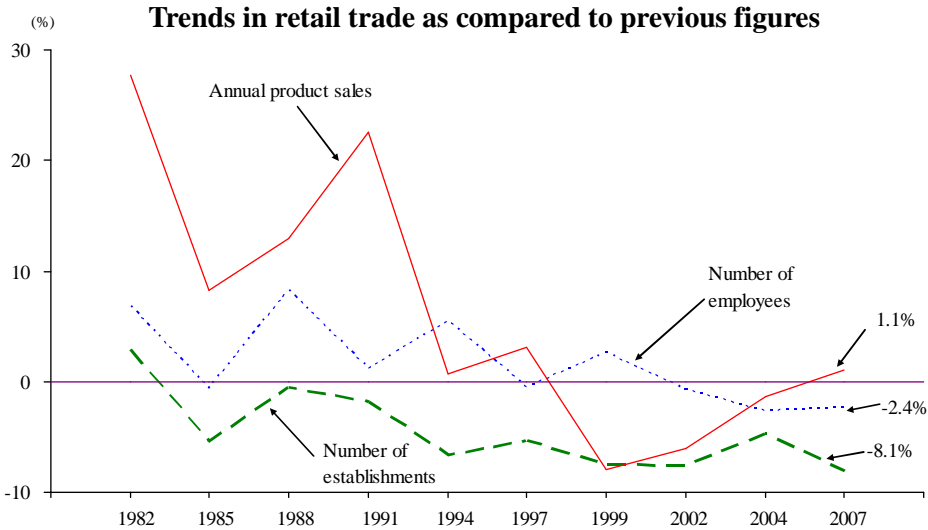
### Annual product sales in wholesale trade by category of industry

Category of industry	Annual product sales (100 million yen)				
	2004	2007	Composition ratio (%)		Comparison (%) 2007/2004
			2004	2007	
Total	4,054,972	4,135,317	100.0	100.0	2.0
Wholesale trade, general merchandise	490,306	490,425	12.1	11.9	0.0
Textile products (except apparel, apparel accessories and notions)	48,229	42,142	1.2	1.0	-12.6
Apparel, apparel accessories and notions	140,525	124,266	3.5	3.0	-11.6
Agricultural, animal and poultry farm and aquatic products	425,776	349,513	10.5	8.5	-17.9
Food and beverages	438,122	406,977	10.8	9.8	-7.1
Building materials	235,415	222,326	5.8	5.4	-5.6
Chemicals and related products	209,392	229,712	5.2	5.6	9.7
Minerals and metals	409,529	589,214	10.1	14.2	43.9
Recycled material	19,182	35,582	0.5	0.9	85.5
General machinery and equipment	240,395	241,479	5.9	5.8	0.5
Motor vehicles	151,119	171,833	3.7	4.2	13.7
Electrical machinery, equipment and supplies	485,250	471,816	12.0	11.4	-2.8
Miscellaneous machinery and equipment	111,074	113,811	2.7	2.8	2.5
Furniture, fixtures and house furnishings	75,998	54,299	1.9	1.3	-28.6
Drugs and toiletries	220,170	227,364	5.4	5.5	3.3
Miscellaneous products, n.e.c.	354,490	364,556	8.7	8.8	2.8

# Retail Trade

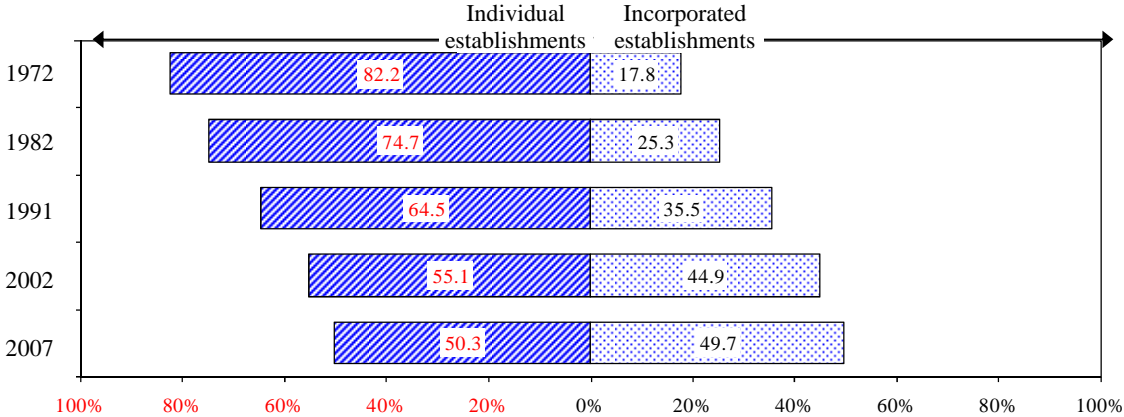
Ratio of individual establishments shrank to 50%, stores in retail trade grew larger

1. In retail trade, the number of establishments was 1.14 million (down 8.1% as compared to the previous census), representing a decline for the ninth consecutive censuses since the 1985 census. Annual product sales were 135 trillion yen (up 1.1% id.) and increased for the first time in four censuses since the 1997 census. The number of persons engaged, including “ workers dispatched and accepted from other companies etc. ”, was 8.06 million (down 3.8% id.). The number of employees was 7.58 million (down 2.4% id.).
2. The number of establishments continued to decrease after peaking in the 1982 census (1.72 million establishments) and reached low level since the census commenced (1952 census: 1.08 million establishments).



3. The ratio of individual establishments continued to shrink to 50.3% after reaching a peak in the 1958 census (composition ratio of 90.1%).
4. Annual product sales increased for “Fuel stores” as a result of an increase in crude oil prices and for “Drugs and toiletry stores” which showed strong sales in drug stores.

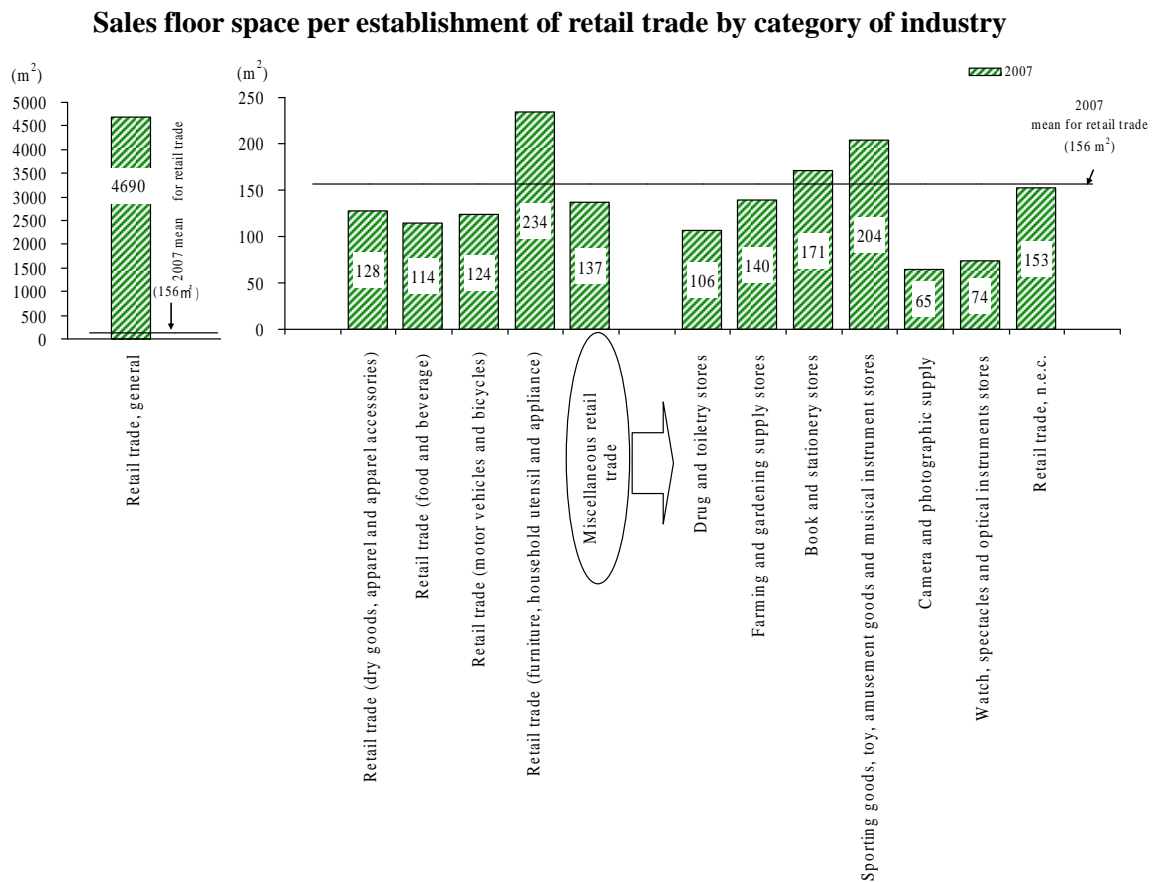
## Trends in the breakdown of the number of retail establishments by legal structure



## Annual product sales in retail trade by category of industry

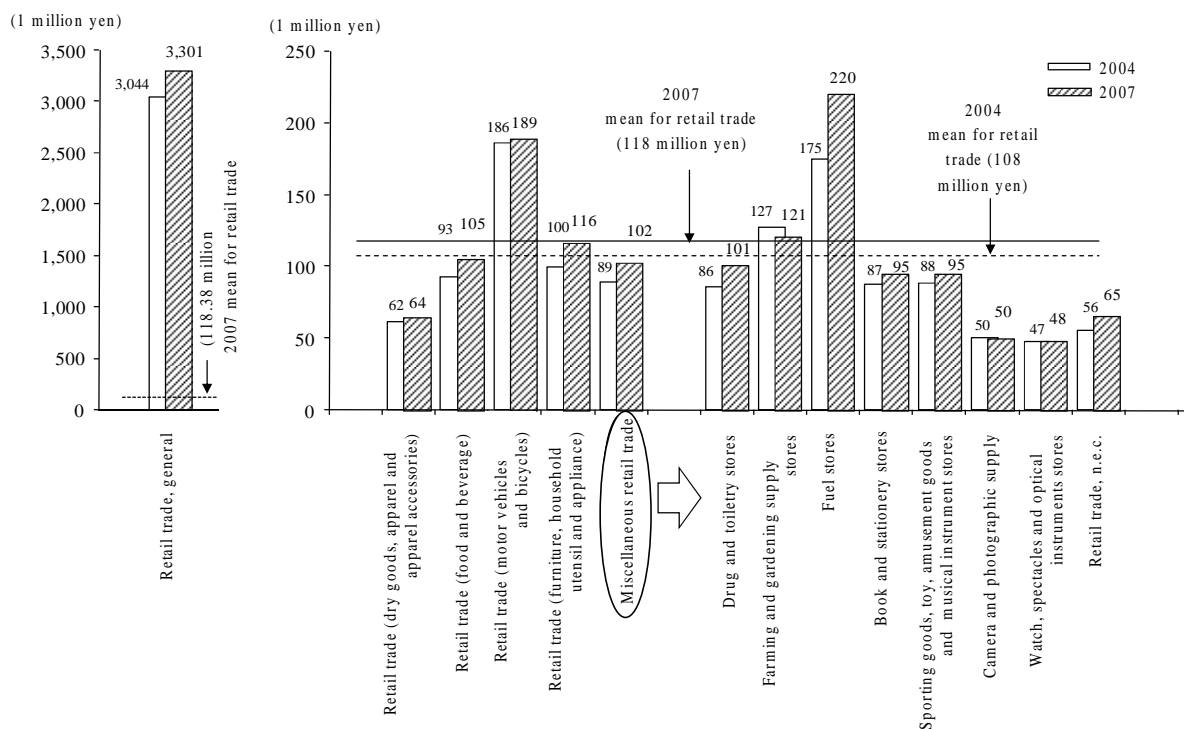
Category of industry		Annual product sales (100 million yen)				
		2004	2007	Composition ratio (%)		Comparison (%)
				2004	2007	2007/2004
Total		1,332,786	1,347,054	100.0	100.0	1.1
Retail trade, general merchandise		169,135	156,527	12.7	11.6	-7.5
Retail trade (dry goods, apparel and apparel accessories)		109,821	106,940	8.2	7.9	-2.6
Retail trade (food and beverages)		413,342	408,133	31.0	30.3	-1.3
Retail trade (motor vehicles and bicycles)		161,767	157,005	12.1	11.7	-2.9
Retail trade (furniture, household utensil and appliance)		114,677	114,847	8.6	8.5	0.1
Miscellaneous retail trade		364,043	403,603	27.3	30.0	10.9
Drug and toiletry stores		74,207	84,724	5.6	6.3	14.2
Farming and gardening supply		19,145	16,774	1.4	1.2	-12.4
Fuel stores		109,352	127,734	8.2	9.5	16.8
Book and stationery stores		47,432	45,654	3.6	3.4	-3.8
Sporting goods, toy, amusement goods and musical instrument		29,099	27,651	2.2	2.1	-5.0
Camera and photographic supply		2,171	1,756	0.2	0.1	-19.1
Watch, spectacles and optical instruments stores		10,120	9,727	0.8	0.7	-3.9
Retail trade, n.e.c.		72,517	89,584	5.4	6.7	23.5

5. The sales floor space per establishment was 156 m<sup>2</sup>. “Retail trade, general” had sales floor space per establishment at 4,690 m<sup>2</sup> and overwhelmingly large, followed by “Retail trade (furniture, household utensil and appliance)”.



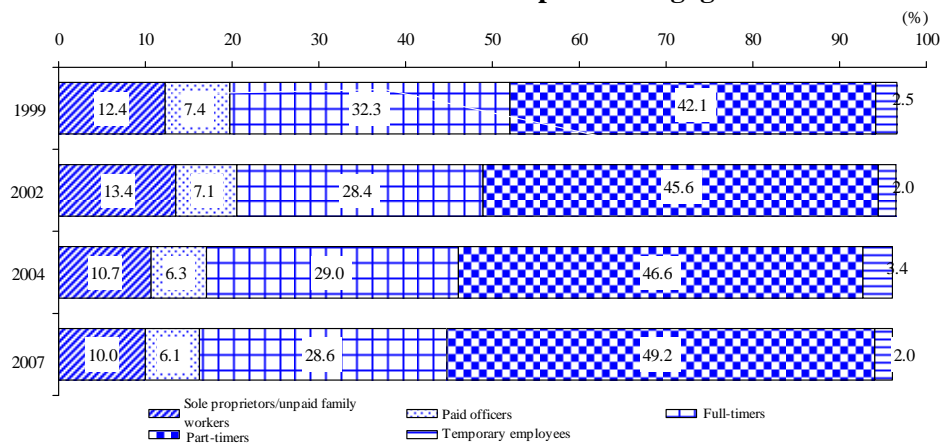
6. Annual product sales per establishment were 120 million yen and up 10.0% as compared to the previous census.

**Annual product sales per retail establishment by category of industry**



7. Looking at the breakdown of the number of persons engaged, the number of part-time employees was 3.97 million and increased by 1.6% as compared to the previous census. The composition ratio also increased by 2.7% as compared to the previous census and accounted for nearly half (composition ratio: 49.2%) of the total number of persons engaged in retail trade. While the total number of persons engaged decreased, the ratio of part-time employees expanded.

**Trends in the breakdown of the number of persons engaged in retail trade**



## Sales Conditions of Establishments inside Fee-based Facilities

For establishments inside stations, nearly eight-fold compared to the retail trade average; for establishments in toll roads, more than three-fold compared to the retail trade average

(Annual product sales per m<sup>2</sup> of sales floor space)

### 1. Sales conditions of establishments in station wickets (inside stations)

(1) In the 2007 census, from among the retail trade establishments inside fee-based facilities, the number of establishments in station wickets<sup>1</sup> (inside stations) was 1,925. Annual product sales were 232.89 billion yen and the number of persons engaged was 12,618.

#### Composition ratios of the number of establishments in station wickets and the total number of retail establishments by category of industry

Category of industry	Establishments in ticket wickets					
	Number of establishments		Annual product sales		Number of persons engaged	
		Composition ratio (%)	(1 million yen)	Composition ratio (%)	(persons)	Composition ratio (%)
Total	1,925	100.0	232,891	100.0	12,618	100.0
Retail trade, general merchandise	14	0.7	7,530	3.2	218	1.7
Retail trade (dry goods, apparel and apparel accessories)	10	0.5	1,942	0.8	113	0.9
Retail trade (food and beverage)	908	47.2	132,881	57.1	8,465	67.1
Of which, convenience stores	164	8.5	47,314	20.3	3,367	26.7
Drug and toiletry stores	5	0.3	464	0.2	39	0.3
Book and stationery stores	710	36.9	62,269	26.7	2,596	20.6
Of which, book stores	428	22.2	41,618	17.9	1,754	13.9
Of which, newspaper stores	282	14.6	20,651	8.9	842	6.7
Miscellaneous retail trade, n.e.c.	278	14.4	27,804	11.9	1,187	9.4

(2) Annual product sales per m<sup>2</sup> of sales floor space were 5.13 million yen. This was nearly eight-fold and high level compared the average annual product sales for retail trade (660,000 yen). Looking by category industry, annual product sales of “Book stores” were 5.66 million yen and those of “Retail trade (food and beverage)” were 5.22 million yen, exceeding the average sales of establishments in station wickets.

#### Annual product sales per unit of establishments in station wickets and of overall retail trade

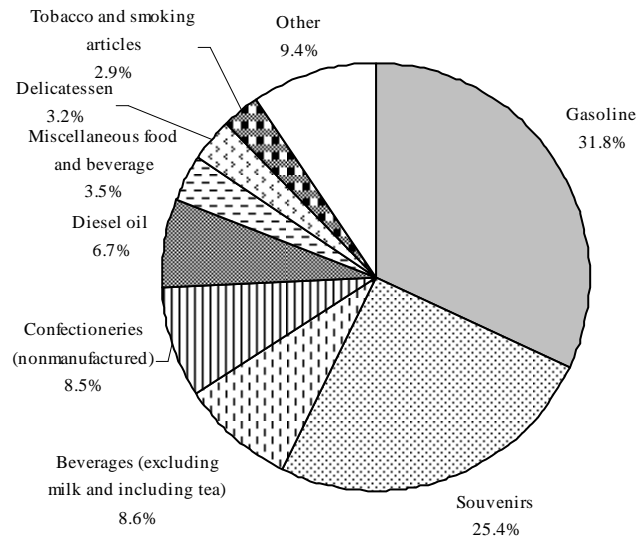
Category of industry	Sales productivity (annual product sales: 10,000 yen)					
	Per establishment		Per person engaged		Per m <sup>2</sup> of sales floor space	
	In station wicket	Overall retail trade	In station wicket	Overall retail trade	In station wicket	Overall retail trade
Total	12,098	11,839	2,282	2,022	513	66
Retail trade, general merchandise	53,786	330,087	3,519	2,505	410	70
Retail trade (dry goods, apparel and apparel accessories)	19,423	6,414	2,182	1,593	296	47
Retail trade (food and beverage)	14,635	10,469	2,042	1,697	522	89
Of which, convenience stores	28,850	16,078	1,930	1,717	424	140
Drug and toiletry stores	9,281	10,080	1,406	1,996	132	96
Book and stationery stores	8,770	9,487	2,661	1,232	-	-
Of which, book stores	9,724	12,375	2,680	1,900	566	50
Of which, newspaper stores	7,323	9,041	2,624	793	-	-
Miscellaneous retail trade, n.e.c.	10,002	6,516	2,726	1,625	486	41

<sup>1</sup> Establishments in station wickets and establishments in toll roads of establishments inside fee-based facilities were surveyed from the census of 2007.

## 2. Sales conditions of establishments in toll roads

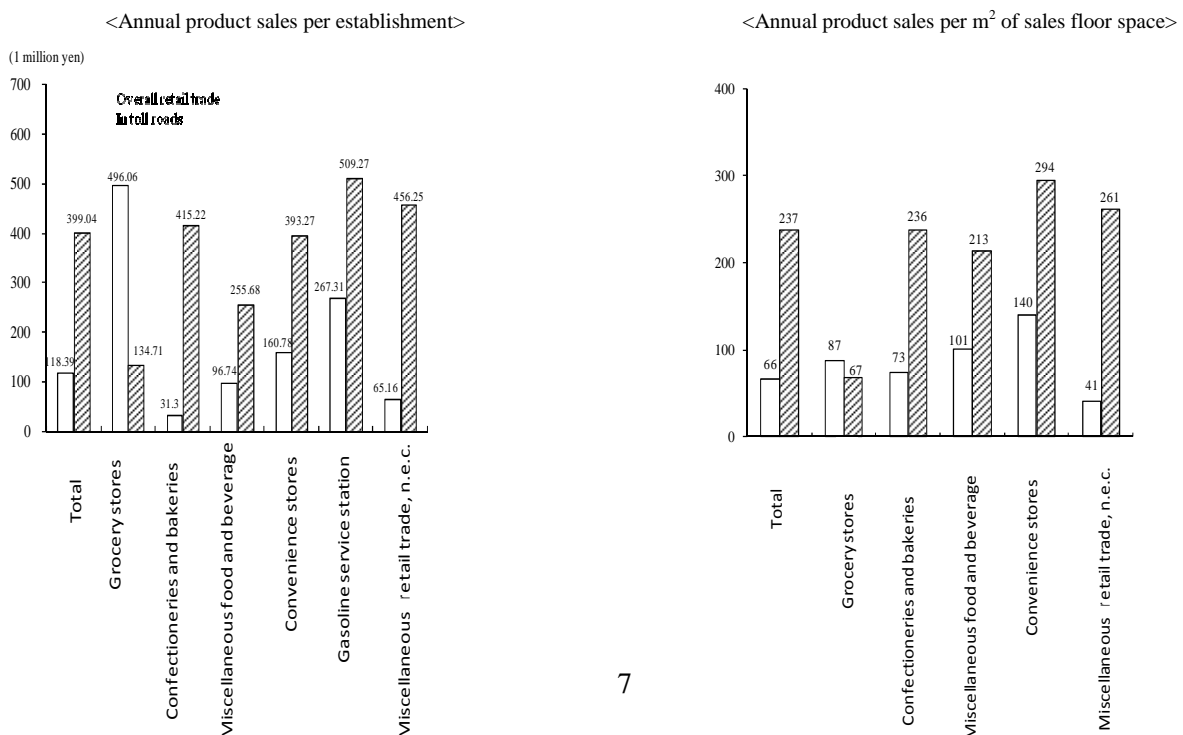
- (1) There were 611 establishments of retail trade in toll roads; annual product sales were 243.8 billion yen and the number of persons engaged was 17,648.
- (2) Looking at the composition ratios of annual product sales by commodity, gasoline was ranked first( 31.8% ), followed by souvenirs( 25.4% ). These two commodities accounted for almost 60% of the total.

### Composition ratios of annual product sales in establishments in toll roads by commodity



- (3) Annual product sales per establishments were 399.04 million yen and annual product sales per m<sup>2</sup> of sales floor space were 2.37 million yen. Both were of high level of more than three-fold compared to the retail trade averages.

### Annual product sales per unit of establishments in toll roads

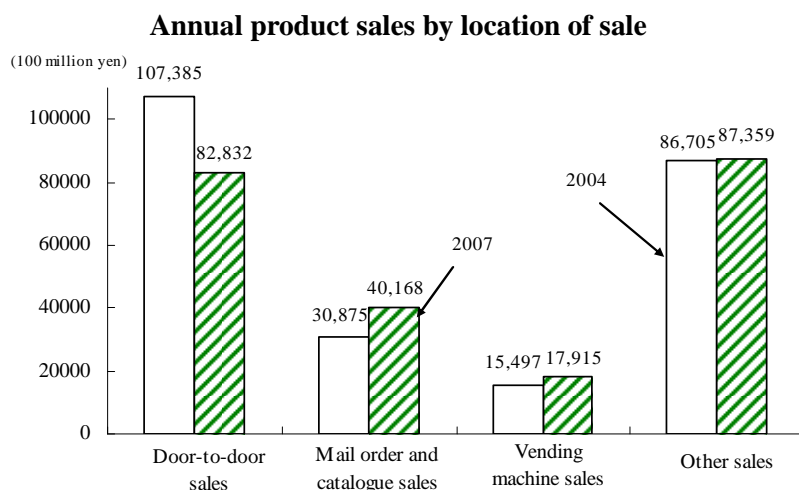


## Locations of Sale in Retail Trade

Annual product sales of mail order and catalogue sales were 4 trillion yen and increased by 30% compared to the 2002 census

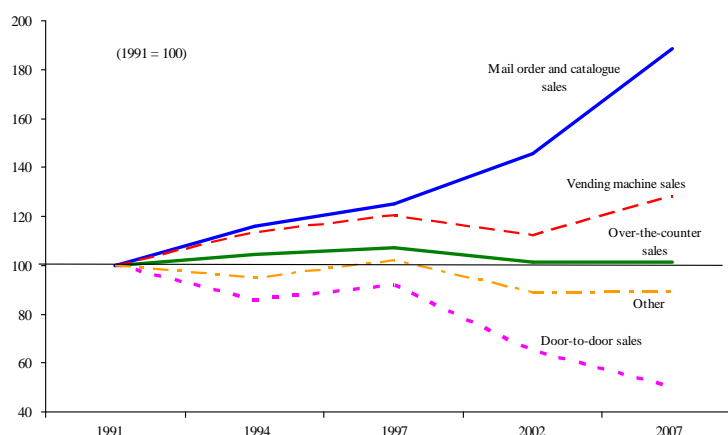
- (1) Looking at annual product sales in establishments of retail trade by location of sale, over-the-counter sales accounted for 110.0167 trillion yen (composition ratio of 82.8%) and non-over-the-counter sales<sup>2</sup> accounted for 22.8287 trillion yen. With regard to the breakdown for non-over-the-counter sales, door-to-door sales accounted for 8.2832 trillion yen (6.2% id.), mail order and catalogue sales accounted for 4.0168 trillion yen (3.0% id.), vending machine sales accounted for 1.7915 trillion yen (1.3% id.) and other sales including joint purchasing accounted for 8.7359 trillion yen (6.6% id.).

Compared to the 2002 census, “Door-to-door sales” decreased by 22.9%, “Mail order and catalogue sales” increased by 30.1%, “Vending machine sales” increased by 15.6% and “Other sales” increased by 0.8%.



- (2) Looking at the growth of indices by setting annual product sales from 1991 as 100, “Mail order and catalogue sales” continued expanding each census since the 1991 census, and “Vending machine sales” decreased in 2002 but increased in 2007. On the other hand, “Door-to-door” sales decreased in both 2002 and 2007.

### Growth in annual product sales by location of sale

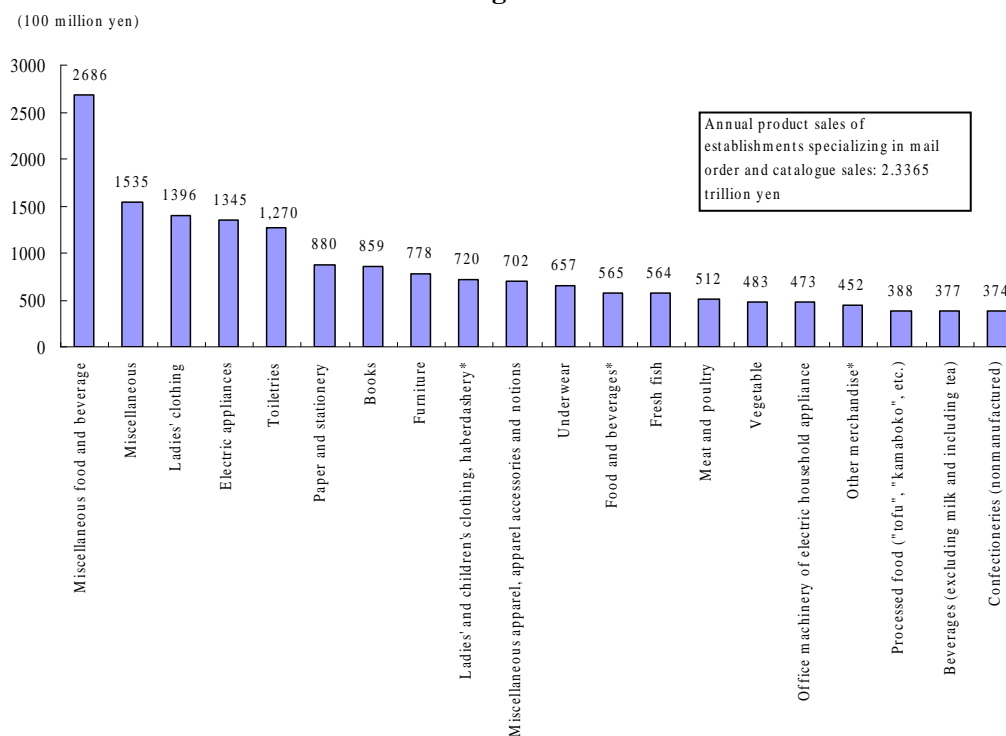


<sup>2</sup> This non-over-the-counter sales refers to “Door-to-door sales” subtracting over-the-counter sales, “Mail order and catalogue sales”, “V ending machine sales” and “Other sales” including joint purchasing other than over-the-counter sales.



- (3) Looking at the establishments which don't have an actual store and engage exclusively in "Mail order and catalogue sales" among non-over-the-counter sales, annual product sales were 2.3365 trillion yen in 2007. The commodity with the largest sales was "Miscellaneous food and beverages" including health foods, supplements, retort foods, chilled foods, frozen foods and noodles, followed by "Miscellaneous" including video recording media such as DVDs, "Ladies' clothing", "Electric appliances", and "Toiletries".

### Top commodities of annual product sales in (specialized) establishments for mail order and catalogue sales



(Note) \* indicates categories based on merchandise classifications of "Department stores and general merchandise supermarkets"