

Turnover in the Vehicle trade and repair sector increased by 12.1% in the Basque Country in 2022

The smallest Retail Trade establishments, with fewer than nine employees, lost ground in favour of larger establishments

In 2022, the Vehicle trade and repair sector as a whole had a turnover of 40,927 million euros, 4,407 million more than in 2021, which represents a rise of 12.1%, according to Eustat data.

A total of 34,795 establishments were in operation in this sector, 3.1% fewer than the previous year, 2021. The number of people employed fell slightly, with 128,160 people employed in 2022, 0.5% less than in 2021, thereby continuing the slow, but clearly declining trend that began last decade. Therefore, compared with 2010, there has been an accumulated fall in employment of 6.6%.

Meanwhile, the number of hours worked also fell by 3.4% compared with the previous year, but it was down by as much as 12.6% compared with 2010, with 2022 showing the lowest level since 2010.

However, staff costs saw an increase of 6.3%, standing at 3,993 million euros, in nominal value, for the year 2022, the highest in the known historical series.

The trade margin on sales - the proportion of the gross trade margin on the value of net sales of goods for resale - achieved for the sector as a whole, stood at 22.1%, 0.2 percentage points lower than 2021 and, as a result, the least favourable since 2010, although with differences between the three branches.

Main variables of the trade and repair of vehicles sector in the Basque Country by province (thousands of euros). 2022

| | Basque Country | Increase (%) 2021-2022 | Araba/Álava | Increase (%) 2021-2022 | Bizkaia | Increase (%) 2021-2022 | Gipuzkoa | Increase (%) 2021-2022 |
|------------------------------------|----------------|------------------------|-------------|------------------------|------------|------------------------|------------|------------------------|
| Personnel employed NU | 128.160 | -0.5 | 19.271 | 1.4 | 67.028 | -0.8 | 41.861 | -1.0 |
| Net amount of the turnover | 40.927.280 | 12.1 | 7.228.431 | 16.4 | 21.006.400 | 11.5 | 12.692.449 | 10.6 |
| Supplies | 31.431.740 | 14.5 | 5.610.136 | 19.8 | 16.143.426 | 13.9 | 9.678.178 | 12.5 |
| Expenditures on personnel | 3.993.129 | 6.3 | 611.604 | 8.7 | 2.058.336 | 5.6 | 1.323.189 | 6.3 |
| Profit for the year | 1.677.036 | -9.1 | 443.607 | 9.5 | 749.090 | -14.9 | 484.339 | -13.4 |
| Gross earnings against sales % (*) | 22.1 | -0.9 | 21.5 | -5.4 | 22.0 | -0.6 | 22.7 | 1.3 |

(*)Difference in percentage points

Date April 26, 2024

Source: Eustat. Survey on trade and repairs

Provinces

At provincial level, Álava registered the best performance for the set of indicators. In this province, sales rose by 16.4% and employment also increased slightly (1.4%); in Bizkaia, turnover was up 11.5% with a slightly negative impact on employment (-0.8%), while in Gipuzkoa, turnover grew by 10.6%, although employment was down 1%.

In 2022, Bizkaia turned over a total of 21,006 million euros, 51.3% of the total, Gipuzkoa turned over 12,692 million, 31.0%, and Álava turned over 7,228 million, 17.7% of the total for the Basque Country.

Meanwhile, staff expenditure rose by 8.7% in Álava, 6.3% in Gipuzkoa, and 5.6% in Bizkaia.

The trade margin on sales increased by 1.3 percentage points in Gipuzkoa, although it fell in the other two provinces, dropping 5.4 percentage points in Álava, and seeing a slight decrease, of 0.6 points, in Bizkaia.

Divisions

In 2022, the three divisions comprising the Vehicle trade and repair sector (Sale and repair of vehicles, Wholesale trade and trade intermediaries and Retail trade) registered positive trends in turnover, although to different extents. On the other hand, the trend in employment was less favourable, and only *Retail* was able to maintain the figures of the previous year, while the other two divisions lost employees.

The **Retail Trade** division, the largest in terms of personnel as it accounted for 59.1% of employment in the sector, and 63.2% of establishments in the sector, turned over 34.2% of the total, with turnover rising by 7.4% although employment fell slightly by 0.6%.

Main variables of the trade and repair sector in the Basque Country by activity group (thousands of euros). 2022

| | Personnel employed | | | Turnover | | | Gross earnings |
|--|--------------------|--------------|------------------------|-------------------|--------------|------------------------|----------------|
| | Value | % of total | Increase (%) 2021-2022 | Value | % of total | Increase (%) 2021-2022 | Value |
| COMMERCE AND UPKEEP | 128.160 | 100.0 | -0.5 | 40.927.280 | 100.0 | 12.1 | 22.1 |
| Sale and repairs of vehicles | 11.776 | 9.2 | -2.0 | 3.199.173 | 7.8 | 2.5 | 20.2 |
| Sale of motor vehicles | 3.740 | 31.8 | -5.2 | 1.808.566 | 56.5 | -4.2 | 14.2 |
| Maintenance and repair of motor vehicles | 6.342 | 53.9 | 2.2 | 846.408 | 26.5 | 16.1 | . |
| Sale of motor vehicle parts and accessories | 1.480 | 12.6 | -9.6 | 499.753 | 15.6 | 9.1 | 28.8 |
| Sale, maintenance and repair of motorcycles | 214 | 1.8 | -4.5 | 44.446 | 1.4 | -6.3 | 25.5 |
| Wholesale trade and intermediaries | 40.599 | 31.7 | 0.0 | 23.720.840 | 58.0 | 16.5 | 19.7 |
| Trade intermediaries | 4.581 | 11.3 | 1.0 | 532.971 | 2.2 | 23.4 | . |
| Wholesale trade in agricultural raw materials and livestock | 473 | 1.2 | 2.2 | 402.612 | 1.7 | 3.7 | 12.7 |
| Wholesale trade in food, drink and tobacco products | 9.372 | 23.1 | -1.4 | 4.729.603 | 19.9 | 9.1 | 19.3 |
| Wholesale of household goods | 6.134 | 15.1 | -1.4 | 3.137.965 | 13.2 | 5.7 | 25.8 |
| Wholesale of information and communication equipment | 1.396 | 3.4 | 2.2 | 1.010.639 | 4.3 | 5.4 | 15.6 |
| Wholesale of other machinery, equipment and supplies | 7.758 | 19.1 | 1.6 | 2.837.276 | 12.0 | 16.9 | 27.7 |
| Other specialised wholesale | 9.903 | 24.4 | 0.2 | 10.584.127 | 44.6 | 24.5 | 16.8 |
| Non-specialised wholesale trade | 982 | 2.4 | 1.4 | 485.647 | 2.0 | 39.5 | 24.4 |
| Retail trade | 75.785 | 59.1 | -0.6 | 14.007.267 | 34.2 | 7.4 | 26.6 |
| Retail trade in specialised establishments | 25.281 | 33.4 | -0.3 | 5.187.106 | 37.0 | 7.7 | 23.7 |
| Wholesale trade in food, drink and tobacco products | 12.494 | 16.5 | -1.4 | 1.849.527 | 13.2 | 4.2 | 22.8 |
| Retail sale of automotive fuel | 2.080 | 2.7 | 1.7 | 1.629.793 | 11.6 | 27.5 | 6.5 |
| Retail sale of information and communication equipment in specialised stores | 1.916 | 2.5 | 0.2 | 270.500 | 1.9 | 8.2 | 26.1 |
| Retail sale of other household equipment | 7.773 | 10.3 | -3.4 | 1.301.331 | 9.3 | -1.1 | 34.8 |
| Retail sale of cultural and recreation goods | 3.627 | 4.8 | -2.2 | 497.399 | 3.6 | -1.0 | 28.4 |
| Retail sale of other goods in specialised stores | 20.336 | 26.8 | 0.3 | 2.987.384 | 21.3 | 5.5 | 39.2 |
| Retail sale via stalls and markets | 801 | 1.1 | 6.2 | 58.753 | 0.4 | 32.4 | 33.7 |
| Retail trade not in establishments or in markets | 1.477 | 1.9 | -0.6 | 225.474 | 1.6 | -0.8 | 47.6 |

Date April 26, 2024

Source: Eustat. Survey on trade and repairs

For its part, **Wholesale trade and trade intermediaries**, with 58.0% of the sector's sales and 31.7% of employment, divided among 9,699 establishments, was the division that presented the most positive trend in terms of turnover. Its turnover increased by 16.5%, and the number of staff employed in the sector remained practically the same, at 40,599 people.

Sale and repair of vehicles also saw a positive trend in revenue, with growth of 2.5% in turnover and a 2.0% fall in employment. In 2022, this section accounted for 9.2% of employment, which was concentrated in 3,102 establishments, and 7.8% of total trade turnover.

Analysing the trade margin, it is observed that, on sales for **Retail trade**, the margin was 26.6%, 1.0 percentage point lower than in 2021. For **Wholesale trade** it was 19.7%, 0.5 points higher, and the margin for the Sale and repair of vehicles division stood at 20.2%, 0.6 percentage points above the previous year.

Size of the establishments

Looking at the size of the establishments in the *Trade and Repairs* sector in terms of staff employed, the smallest stratum, of 1 to 9 employees, saw an increase in turnover of 8%, although employment fell by 1.6%, and the number of establishments was down 3.4%. The stratum of ten to forty-nine employees saw an increase in all three indicators, with turnover growing by 18.4%, employees increasing by 2.6%, and the number of establishments rose by 2.5%. For its part, the stratum of fifty employees or more increased its turnover by 6.3%, its number of employees fell by 2.9%, and the number of establishments was also down 3.4%, all compared with 2021.

Main variables of the trade and repair of vehicles sector in the Basque Country by employment stratum (thousands of euros). 2022

| | Number or establishments | | | Personnel employed | | | Turnover | | |
|---------------|--------------------------|--------------|------------------------|--------------------|--------------|------------------------|-------------------|--------------|------------------------|
| | Value | % of total | Increase (%) 2021-2022 | Value | % of total | Increase (%) 2021-2022 | Value | % of total | Increase (%) 2021-2022 |
| TOTAL | 34.795 | 100,0 | -3,1 | 128.160 | 100,0 | -0,5 | 40.927.280 | 100,0 | 12,1 |
| From 1 to 9 | 32.559 | 93,6 | -3,4 | 69.542 | 54,3 | -1,6 | 15.599.658 | 38,1 | 8,0 |
| From 10 to 49 | 2.067 | 5,9 | 2,5 | 39.445 | 30,8 | 2,6 | 18.173.314 | 44,4 | 18,4 |
| 50 or more | 169 | 0,5 | -3,4 | 19.173 | 15,0 | -2,9 | 7.154.308 | 17,5 | 6,3 |

Date April 26, 2024

Source: Eustat. Survey on trade and repairs

Small retail trades, with fewer than nine employees, has lost 19.5% of its establishments and 11.9% of its employees since 2015

Focusing on *Retail Trade*, and from a broader time perspective, the reduction in the number of establishments since 2015 is notable. Effectively, in just 8 years, almost 5,000 establishments have been lost (4,907), going from 26,901 initially, to 21,994 in 2022, which represents a reduction of 18.2%.

Although employment has also been impacted, with 1,957 fewer people employed, it has not happened to the same extent, with its relative decrease being limited to 2.5% compared with 2015. Nonetheless, all of this has not stopped turnover from increasing, in nominal terms, by 8.8% in the last 8 years.

Main variables of the Retail Trade division of the Basque Country by year, according to employment stratum (thousands of euros). 2015-2022

| | Number of establishments | | | | Personnel employed | | | | Turnover | | | |
|------|--------------------------|-------------|---------------|------------|--------------------|-------------|---------------|------------|------------|-------------|---------------|------------|
| | Total | From 1 to 9 | From 10 to 49 | 50 or more | Total | From 1 to 9 | From 10 to 49 | 50 or more | Total | From 1 to 9 | From 10 to 49 | 50 or more |
| 2015 | 26.901 | 26.056 | 765 | 80 | 77.742 | 50.792 | 14.547 | 12.403 | 12.869.366 | 7.591.662 | 2.933.957 | 2.343.747 |
| 2022 | 21.994 | 20.988 | 901 | 105 | 75.785 | 44.760 | 17.257 | 13.768 | 14.007.267 | 6.635.591 | 4.362.910 | 3.008.766 |

Date April 26, 2024

Source: Eustat. Survey on Trade and Repairs

However, this trend is uneven depending on the size of the establishments.

In reality, it is wholly a result of the decline of smaller establishments, those with fewer than nine employees. Thus, the period between 2015 and 2022 saw 19.5% fewer establishments and 11.9% fewer people employed – 6,032 people – for this range of employment. Meanwhile, turnover contracted by 12.6%.

On the other hand, establishments with more than nine employees, as a whole, accounted, to a large extent, for the loss of employment caused by the former group of establishments, by generating 4,075 new jobs during the period, 15.1% more. Similarly, turnover for establishments with more than nine employees stood at 39.7%, reaching 7,372 million euros in 2022, compared with 5,278 million in 2015; thus, establishments with fewer than nine employees lost 956 million euros in the eight years analysed, but those with more than nine gained 2,094 million euros.

For further information:

Eustat - Euskal Estatistika Erakundea / Basque Statistics Institute

C/ Donostia-San Sebastián, 1 01010 Vitoria-Gasteiz

Press Service: servicioprensa@eustat.eus Tel.: 945 01 75 62