

News

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Department
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PRODUCTIVITY AND COSTS BY INDUSTRY: WHOLESALE TRADE, RETAIL TRADE, AND FOOD SERVICES AND DRINKING PLACES, 2004

The Bureau of Labor Statistics of the U.S. Department of Labor reported today on labor productivity changes for wholesale trade, retail trade, and food services and drinking places. In 2004, labor productivity—defined as output per hour—rose 7.8 percent in wholesale trade, 6.1 percent in retail trade, and 2.4 percent in food services and drinking places. Output increased in each of them, while hours increased in retail trade and food services and drinking places but remained steady in wholesale trade. Productivity increased in 40 of the 50 industries studied, as output rose in 46 industries and hours declined in 26 industries.

From 1987 to 2004, labor productivity rose at an average annual rate of 3.9 percent per year in wholesale trade, 3.4 percent per year in retail trade, and 0.7 percent per year in food services and drinking places. In wholesale trade, output increased 4.4 percent per year, on average, while hours increased 0.4 percent per year. In retail trade, output increased 4.3 percent per year and hours rose 0.8 percent. In food services and drinking places, output increased at an average rate of 2.5 percent while hours increased 1.8 percent. Unit labor costs, which reflect the total cost of labor required to produce a unit of output, increased in wholesale trade and food services and drinking places, and decreased in retail trade during this period.

Industry productivity and cost measures are produced and published as data become available. Measures for industries in other sectors have been published in separate releases and can be accessed online at: http://www.bls.gov/schedule/archives/all_nr.htm

2003-04 change

Labor productivity increased 12.8 percent in durable merchant wholesale trade (NAICS 423) and 4.4 percent in nondurable merchant wholesale trade (NAICS 424), but declined 0.5 percent in electronic markets and agents and brokers (NAICS 425) in 2004. Labor productivity grew in all nine of the detailed durable merchant wholesale industries, as output rose in each and hours fell in five of the nine industries. Of the nine detailed nondurable merchant wholesale industries, labor productivity grew in seven, as output rose in seven industries and hours fell in six industries. Among wholesale trade industries productivity grew most rapidly in electrical goods (NAICS 4236) and lumber and construction supplies (NAICS 4233), where output per hour rose 21.9 percent and 16.5 percent, respectively. Unit labor costs declined in eight of the nine detailed durable merchant wholesale trade industries and in four of the nine detailed nondurable merchant wholesale trade industries, but rose in electronic markets and agents and brokers.

Labor productivity rose in 21 of the 27 detailed retail trade industries in 2004 (all 4-digit NAICS industries and those 3-digit NAICS industries that are the same as 4-digit industries). The largest increases were 18.1 percent in sporting goods and musical instrument stores (NAICS 4511) and 17.2 percent in electronic shopping and mail order houses (NAICS 4541). Output grew in 25 of the 27 retail industries, and all but four of these experienced productivity increases. Hours declined in 15 retail industries, 13 of which experienced productivity increases. Productivity grew in five of the six largest retail trade industries, those with more than 1,000,000 employees. Unit labor costs fell in 19 of 27 retail trade industries, led by a 13.2 percent decline in electronics and appliance stores (NAICS 443).

Three of the four industries in food services and drinking places recorded productivity gains in 2004. The fastest productivity growth, 3.3 percent, occurred in limited-service eating places (NAICS 7222). Productivity grew 2.3 percent in the largest industry in this group, full-service restaurants (NAICS 7221).

Long-term trends

Between 1987 and 2004, average annual productivity growth of 5.8 percent in durable merchant wholesale trade (NAICS 423) exceeded the 1.9 percent growth in nondurable merchant wholesale trade (NAICS 424) and the 3.3 percent growth in electronic markets and agents and brokers (NAICS 425). Labor productivity increased in all nine of the detailed industries in durable merchant wholesale trade, as output rose in each and hours declined in two of them. Labor productivity increased in all but one of the nine industries in nondurable merchant wholesale trade, where output rose in seven of the nine industries and hours declined in four of them. Output per hour rose most rapidly in commercial equipment wholesalers (NAICS 4234) and in electric goods wholesalers (NAICS 4236), advancing at average annual rates of 14.9 percent per year and 9.8 percent per year, respectively. Unit labor costs declined in three of the nine durable merchant wholesale trade industries during the period, but increased in each of the nondurable wholesale industries and in electronic markets and agents and brokers.

Output per hour increased in all but one of the 27 detailed retail trade industries from 1987 to 2004; only specialty food stores (NAICS 4452) recorded a productivity decline, 0.3 percent. Labor productivity rose at a rapid 13.3 percent per year, on average, in electronics and appliance stores (NAICS 443) and 12.7 percent in electronic shopping and mail order houses (NAICS 4541). Output increased in 25 of the 27 retail industries, while hours increased in 21 industries. Among the six largest retail industries productivity growth was greatest in other general merchandise stores (NAICS 4529), where output per hour increased 7.6 percent per year. Unit labor costs declined in 15 of the 27 retail trade industries between 1987 and 2004 and declined by 0.3 percent per year in retail trade overall.

Each of the food services industries recorded average annual growth in labor productivity of 1.2 percent or less from 1987 to 2004. During the same period, labor productivity in drinking places (NAICS 7224) declined 0.6 percent per year as output remained the same and hours increased 0.6 percent. Unit labor costs increased in each industry and rose by 3.1 percent per year in food services and drinking places overall.

The index numbers and rates of change reported by BLS for productivity and costs by industry in its news release and on its Internet site are rounded to one decimal place, based upon unrounded data using many decimal places. This rounding protocol has been practiced in order to facilitate ease of use and interpretation of the published data. This has meant, however, that if data users calculated rates of change using the published rounded index figures, their results could differ from the published rates of change, simply due to differences in rounding.

In order to make the data directly used in the calculation more readily available to the public and to ensure greater transparency of its calculating methods, BLS, beginning with the first publication of the Productivity and Costs by Industry news release in 2006, will modify its industry productivity program practices. It will post on its web site productivity index numbers rounded to three decimal places, and, in addition, will calculate all published rates of change from those indexes. The change in calculation method may cause published productivity growth rates to change slightly—likely by no more than a tenth—from the rates that would have been calculated using the current method. The convention of publishing in the news release index values rounded to one decimal place will continue.

Technical Note

Labor Productivity

The industry labor productivity measures describe the relationship between output and the labor time involved in its production. They show the changes from period to period in the amount of goods and services produced per hour. Industry output per hour indexes are prepared from data published by various public and private agencies, using the greatest level of industry detail available.

Although the labor productivity measures relate output to hours of employees or all persons engaged in an industry, they do not measure the specific contribution of labor, capital, or any other factor of production. Rather, they reflect the joint effects of many influences, including changes in technology; capital investment; level of output; utilization of capacity, energy, and materials; the organization of production; managerial skill; and the characteristics and effort of the workforce

Year-to-year movements in productivity measures for some industries might be erratic, particularly in the smaller industries. The annual changes in an industry's output and use of labor may reflect cyclical changes in the economy rather than long-term trends. Also, annual productivity indexes are based on sample data, which are likely to differ from data generated by a census of establishments in the industry. As a result, long-term trends tend to be more reliable indicators of the performance of an industry than are the year-to-year changes.

Output

Industry output is measured as "sectoral output", the total value of goods and services leaving the industry. Output measures for the trade and food services and drinking places industries are derived from the value of the goods and services sold, adjusted for price change. Data from the economic censuses and annual surveys of the Bureau of the Census, U.S. Department of Commerce, are used in developing industry output measures for these industries, together with information on price changes primarily from BLS.

The indexes of industry output used in measuring labor productivity and unit labor costs are, wherever possible, calculated with a Tornqvist formula. This formula aggregates the growth rates of the various industry outputs between two periods using their relative shares in industry value of production, averaged over the two periods, as weights.

Labor Hours

The industry labor input measures represent the hours paid of all workers in the industry. Data on employment and average weekly hours paid are used to construct measures of total hours for different categories of workers. The primary source of

employment and hours data is the BLS Current Employment Statistics (CES) program, which provides monthly survey data on the number of jobs held by wage and salary workers in nonfarm establishments. The CES also provides average weekly hours of production and nonsupervisory workers in these establishments. The Office of Productivity and Technology estimates average weekly hours for supervisory and nonproduction workers by industry using information from the Current Population Survey (CPS) together with the CES data. For the trade and food services and drinking places industries, estimates of the hours of proprietors and unpaid family workers from the CPS are added to hours of supervisory and nonsupervisory employees. Hours for different types of workers are treated as homogeneous and are directly aggregated. The indexes of hours are developed by dividing the aggregate hours for each year by the base-period aggregate.

Unit Labor Costs

The unit labor cost series in this release describe the cost of labor input required to produce one unit of output. The indexes of unit labor costs for each industry are computed by dividing an index of industry labor compensation by the index of industry output.

Compensation is a measure of the cost to the employer of securing the services of labor. It is defined as payroll plus supplemental payments. Payroll includes salaries, wages, commissions, dismissal pay, bonuses, vacation and sick leave pay, and compensation in kind. Supplemental payments are divided into legally required expenditures and payments for voluntary programs. The legally required expenditures include employers' contributions to Social Security, unemployment insurance taxes, and workers' compensation. Payments for voluntary programs include all programs not specifically required by legislation, such as the employer portion of private health insurance and pension plans.

Adjustments and Revisions

The measures in this news release replace the wholesale trade, retail trade, and food services and drinking places series published in *Productivity and Costs by Industry, 2003* (released August 26, 2005), and include some revisions to those series. The measures in this release incorporate new benchmark sales data from the Bureau of the Census' 2002 Census of Wholesale Trade and 2002 Census of Retail Trade. The Census data include historical revisions that reflect new rules for classifying wholesale and retail establishments by industry. The revisions resulted in some historical changes to the wholesale and retail industry productivity and cost measures. In addition, the measures in this release reflect changes to the output series underlying the wholesale trade industry productivity measures. In particular, the output measures for wholesale trade electronic markets and agents and brokers (NAICS 425) previously included e-commerce revenues of merchant wholesalers; those revenues are now included in the output measures for each merchant wholesale trade industry instead. Because of the lack of reliable historical data at the detailed industry level, separate productivity and related measures are no longer maintained for NAICS 42511, business to business electronic markets, or NAICS 42512,

agents and brokers. Also, in the retail trade sector, the method for constructing output of new car dealers (NAICS 441110) was changed to be consistent with the methods used for the other retail trade industries. Previously, the output measure for that industry mainly reflected changes in base-year weighted physical quantities of output from industry sources. Finally, the labor hours measures reported here reflect the new estimates of supervisory worker hours that were introduced and discussed in the *Productivity and Costs by Industry, 2003* news release (released August 26, 2005). All of the measures for 2004 in this release are preliminary and are subject to revision.

Additional Information

The attached tables include data for all 3- and 4-digit NAICS industries in retail trade, wholesale trade and food services and drinking places. Productivity and unit labor cost data for NAICS industries in this news release can be accessed electronically by visiting the Labor Productivity and Costs web site (<http://www.bls.gov/lpc/>). Measures for additional selected 5- and 6-digit industries are available upon request by calling the Division of Industry Productivity Studies (202-691-5618) or by sending a request by e-mail (dipsweb@bls.gov). Data on industry employment, annual hours, net value of production and the implicit price deflator for output also are available upon request for all industries maintained. Historical productivity and related series for 3- and 4-digit SIC industries through 2000 also are available on the BLS web site or will be provided upon request.

Information in this release will be made available to sensory impaired individuals upon request. Voice phone: 202-691-5618; TDD message referral phone number: 1-800-877-8339.

Table 1. Annual percent change in output per hour and related series, 1987-2004 and 2003-2004

NAICS code	Industry	2004 Employment (thousands)	Annual percent change, 1987-2004			Annual percent change, 2003-2004		
			Output per hour	Output	Hours	Output per hour	Output	Hours
Wholesale Trade								
42	Wholesale trade	5832	3.9	4.4	0.4	7.8	7.8	0.0
423	Durable goods	3042	5.8	6.0	0.2	12.8	12.2	-0.6
4231	Motor vehicles and parts	354	4.4	4.3	0.0	6.7	7.0	0.3
4232	Furniture and furnishings	116	2.5	2.5	0.0	10.1	8.6	-1.3
4233	Lumber and construction supplies	247	1.2	2.7	1.5	16.5	22.5	5.1
4234	Commercial equipment	653	14.9	15.2	0.3	14.0	10.7	-2.9
4235	Metals and minerals	123	1.0	0.8	-0.1	15.6	15.1	-0.4
4236	Electric goods	350	9.8	9.6	-0.2	21.9	17.6	-3.5
4237	Hardware and plumbing	238	1.8	2.5	0.7	4.7	6.2	1.4
4238	Machinery and supplies	672	2.8	2.8	0.0	14.9	16.5	1.3
4239	Miscellaneous durable goods	289	2.1	2.3	0.2	12.9	8.9	-3.5
424	Nondurable goods	2085	1.9	2.1	0.2	4.4	2.9	-1.5
4241	Paper and paper products	156	2.6	2.2	-0.3	7.0	3.6	-3.2
4242	Druggists' goods	224	5.2	7.9	2.5	8.5	8.7	0.2
4243	Apparel and piece goods	157	2.2	2.4	0.1	4.8	4.6	-0.2
4244	Grocery and related products	710	1.0	1.8	0.8	0.5	-1.4	-2.0
4245	Farm product raw materials	75	3.0	-0.1	-3.1	11.3	3.7	-6.9
4246	Chemicals	135	-0.1	0.7	0.8	-4.9	-1.6	3.4
4247	Petroleum	103	3.8	0.6	-3.1	14.2	1.5	-11.1
4248	Alcoholic beverages	143	0.5	1.9	1.5	-3.9	1.8	5.9
4249	Miscellaneous nondurable goods	384	0.3	0.0	-0.3	8.2	6.0	-2.0
425	Electronic markets and agents and brokers	705	3.3	5.5	2.1	-0.5	7.3	7.9
Retail Trade								
44-45	Retail trade	15933	3.4	4.3	0.8	6.1	6.5	0.4
441	Motor vehicle and parts dealers	1989	3.0	4.3	1.3	4.0	6.4	2.3
4411	Automobile dealers	1306	2.8	4.2	1.3	6.5	6.5	0.0
4412	Other motor vehicle dealers	165	3.8	6.5	2.6	5.9	9.7	3.6
4413	Auto parts, accessories, and tire stores	518	3.2	4.0	0.8	-4.7	2.9	8.0
442	Furniture and home furnishings stores	605	4.6	5.4	0.8	8.4	7.4	-0.9
4421	Furniture stores	308	4.3	4.9	0.6	9.9	9.6	-0.2
4422	Home furnishings stores	297	5.0	6.0	1.0	6.6	4.9	-1.6
443	Electronics and appliance stores	549	13.3	14.7	1.2	11.6	16.5	4.4
444	Building material and garden supply stores	1273	3.7	5.7	1.9	9.9	13.3	3.1
4441	Building material and supplies dealers	1113	3.7	5.9	2.2	9.9	14.2	3.9
4442	Lawn and garden equipment and supplies stores	160	4.0	4.2	0.2	9.3	7.0	-2.2
445	Food and beverage stores	2918	0.2	0.3	0.0	5.8	1.4	-4.1
4451	Grocery stores	2493	0.2	0.3	0.1	5.7	1.1	-4.4
4452	Specialty food stores	274	-0.3	-0.1	0.1	9.4	7.6	-1.7
4453	Beer, wine and liquor stores	152	1.8	0.2	-1.6	6.6	2.7	-3.7
446	Health and personal care stores	968	2.9	4.0	1.0	6.2	3.7	-2.4
447	Gasoline stations	901	2.3	1.8	-0.5	1.4	3.2	1.9
448	Clothing and clothing accessories stores	1455	4.5	4.8	0.3	-0.1	6.6	6.7
4481	Clothing stores	1069	4.6	5.2	0.6	0.0	7.7	7.6
4482	Shoe stores	192	3.7	2.6	-1.0	-8.5	1.9	11.4
4483	Jewelry, luggage, and leather goods stores	193	4.7	4.8	0.1	6.3	5.4	-0.9
451	Sporting goods, hobby, book, and music stores	712	4.2	4.9	0.7	15.4	4.1	-9.8
4511	Sporting goods and musical instrument stores	485	4.9	5.4	0.5	18.1	5.3	-10.9
4512	Book, periodical, and music stores	227	2.6	3.9	1.3	9.9	1.9	-7.3
452	General merchandise stores	2864	3.9	5.5	1.6	4.1	6.6	2.4
4521	Department stores	1625	1.3	2.9	1.6	1.5	1.3	-0.3
4529	Other general merchandise stores	1240	7.6	9.4	1.6	5.3	11.1	5.5

Table 1. Annual percent change in output per hour and related series, 1987-2004 and 2003-2004--Continued

NAICS code	Industry	2004 Employment (thousands)	Annual percent change, 1987-2004			Annual percent change, 2003-2004		
			Output per hour	Output	Hours	Output per hour	Output	Hours
453	Miscellaneous store retailers	1092	3.8	4.9	1.1	4.1	3.7	-0.4
4531	Florists	134	1.5	0.2	-1.3	-5.8	-6.6	-0.8
4532	Office supplies, stationery and gift stores	440	6.0	6.3	0.3	6.3	0.4	-5.5
4533	Used merchandise stores	172	2.3	6.4	4.0	0.0	1.3	1.3
4539	Other miscellaneous store retailers	345	2.0	4.3	2.3	2.7	8.4	5.6
454	Nonstore retailers	607	9.9	10.0	0.1	14.6	14.0	-0.5
4541	Electronic shopping and mail-order houses	250	12.7	17.2	3.9	17.2	17.4	0.2
4542	Vending machine operators	62	0.1	-1.8	-1.9	-0.9	-5.4	-4.5
4543	Direct selling establishments	295	5.0	3.3	-1.7	10.0	9.9	-0.1
Food Services and Drinking Places								
722	Food services and drinking places	9081	0.7	2.5	1.8	2.4	5.6	3.1
7221	Full-service restaurants	4329	0.8	2.7	1.9	2.3	4.8	2.5
7222	Limited-service eating places	3830	0.8	2.6	1.8	3.3	7.1	3.7
7223	Special food services	530	1.2	2.5	1.3	-0.2	1.3	1.5
7224	Drinking places, alcoholic beverages	392	-0.6	0.0	0.6	0.6	7.9	7.2

Table 2. Annual percent change in total compensation, output, and unit labor costs, 1987-2004 and 2003-2004

NAICS code	Industry	2004 Employment (thousands)	Annual percent change, 1987-2004			Annual percent change, 2003-2004		
			Total compensation	Output	Unit labor costs	Total compensation	Output	Unit labor costs
Wholesale Trade								
42	Wholesale trade	5832	5.1	4.4	0.7	5.0	7.8	-2.6
423	Durable goods	3042	4.8	6.0	-1.1	4.6	12.2	-6.8
4231	Motor vehicles and parts	354	4.2	4.3	-0.1	2.4	7.0	-4.3
4232	Furniture and furnishings	116	5.3	2.5	2.7	4.9	8.6	-3.5
4233	Lumber and construction supplies	247	4.3	2.7	1.5	12.6	22.5	-8.1
4234	Commercial equipment	653	5.2	15.2	-8.7	1.3	10.7	-8.5
4235	Metals and minerals	123	4.6	0.8	3.7	14.6	15.1	-0.4
4236	Electric goods	350	5.3	9.6	-4.0	4.0	17.6	-11.6
4237	Hardware and plumbing	238	4.8	2.5	2.3	6.9	6.2	0.7
4238	Machinery and supplies	672	4.5	2.8	1.7	5.1	16.5	-9.7
4239	Miscellaneous durable goods	289	5.1	2.3	2.8	5.2	8.9	-3.4
424	Nondurable goods	2085	5.1	2.1	2.9	2.8	2.9	-0.1
4241	Paper and paper products	156	4.2	2.2	1.9	1.4	3.6	-2.1
4242	Druggists' goods	224	11.6	7.9	3.4	1.8	8.7	-6.3
4243	Apparel and piece goods	157	4.5	2.4	2.1	4.6	4.6	0.0
4244	Grocery and related products	710	5.0	1.8	3.2	2.7	-1.4	4.2
4245	Farm product raw materials	75	3.0	-0.1	3.1	-1.7	3.7	-5.2
4246	Chemicals	135	4.8	0.7	4.0	3.6	-1.6	5.3
4247	Petroleum	103	2.6	0.6	2.0	2.8	1.5	1.3
4248	Alcoholic beverages	143	4.8	1.9	2.9	10.3	1.8	8.3
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Table 2. Annual percent change in total compensation, output, and unit labor costs, 1987-2004 and 2003-2004--Continued

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4542	Vending machine operators	62	1.3	-1.8	3.2	1.6	-5.4	7.5
4543	Direct selling establishments	295	0.9	3.3	-2.3	1.1	9.9	-8.0
Food Services and Drinking Places								
722	Food services and drinking places	9081	5.7	2.5	3.1	5.9	5.6	0.3
7221	Full-service restaurants	4329	6.7	2.7	3.9	6.5	4.8	1.6
7222	Limited-service eating places	3830	5.3	2.6	2.6	5.8	7.1	-1.2
7223	Special food services	530	4.0	2.5	1.5	5.0	1.3	3.7
7224	Drinking places, alcoholic beverages	392	2.3	0.0	2.4	1.3	7.9	-6.1