

Retail and Wholesale Trade: Practical Experience in the Use of Corporate Data

Katie Frawley

Chief, Section of Services

Producer Price Index

U.S. Bureau of Labor Statistics

40th Voorburg Group Meeting

September 21-25, 2026



Let's start with a little bit of background...



Respondent Burden

Manual reporting can impose a burden on firms participating in the voluntary PPI survey



Periodic Sampling Limitations

Limited understanding of product changes over time makes it difficult to maintain representative samples in dynamic industries

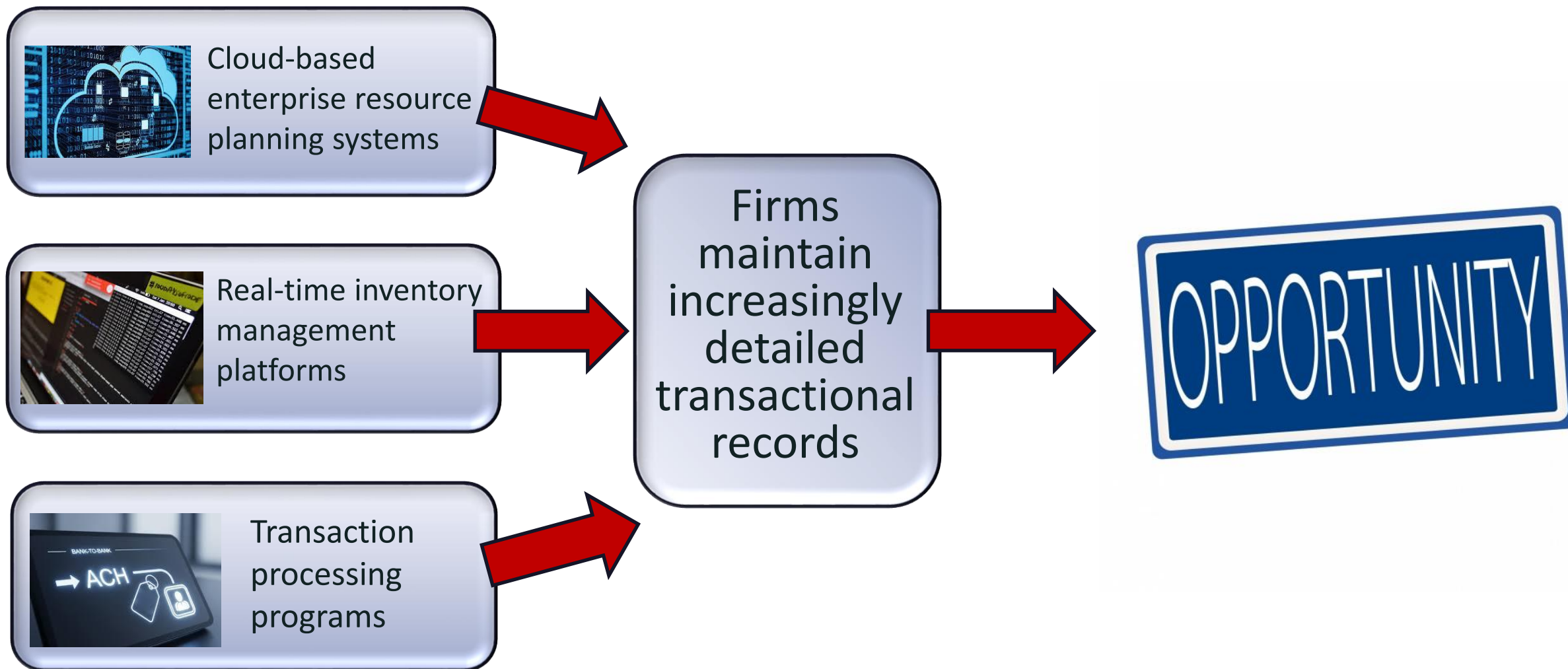


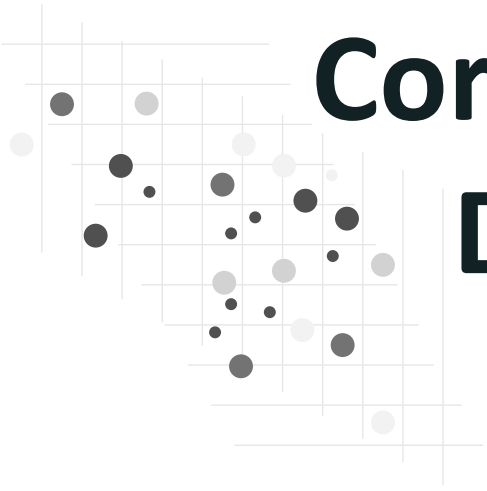
Large Transaction Volumes

Collecting representative prices for industries with large transaction volumes, broad product inventories, and rapidly changing inventories is challenging



Need for Alternative Data Collection





Corporate Data

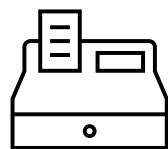
WHAT

- Large set of transaction level data provided by a sampled firm
- A report that the firm already maintains
- Contains prices, costs, quantities, and product identifiers

WHY

- Reduces respondent burden while increasing available data
- Allows development of more representative transaction groupings
- Improves insight into index movements and drivers of price change

Corporate Data in Retail and Wholesale Trade



Retail and wholesale trade
PPIs measure changes in
gross margins



Stable product definitions,
recurring transactions, and
sufficient detail are needed
to evaluate margins over
time



Ideal Candidate

Trade industries are driven by
large transaction volumes
and broad, constantly
changing product inventories

Most firms maintain highly
granular records of
transactions with dates,
quantities, prices, costs,
discounts, etc.

Benefits of Corporate Data in Retail and Wholesale Trade



Access to larger share of firm's activity than traditional collection



Permits development of broad comparable product lines



Calculate margins using broader set of observations



More representative margin measurement without added burden on firm

Pilot Program

Test Industry

Grocery and Related Products
Merchant Wholesalers (NAICS 424400)

Objective

Assess both the feasibility of acquiring corporate datasets and ability to process, evaluate, and use the data

Initiation Process

-  Engage with personnel with direct knowledge of firm pricing, inventory, accounting, or information systems
-  Offer firms option to provide traditional data or corporate data
-  Understand how data is maintained within the firm and what data is available to BLS
-  Cooperating firms asked to provide records covering major product categories
-  Data availability varies across firms – inventory systems, accounting, product categories, reporting structures

Successful Corporate Data Collection



What we asked for...

- Respondents encouraged to provide as much detailed transaction information as possible
- BLS provided mockups to respondents of acceptable formats for corporate data file submission

Basic Example

Product	Cost	Sale Price	Margin
Product A	\$60	\$100	\$40
Product B	\$30	\$80	\$50

What we received...

- Broader set of observations than traditional data collection representing a substantially larger share of the firm's activity
- Datasets containing product identifiers, descriptions, quantities sold, sales prices, and acquisition costs
- Underlying data to develop representative product groups and calculate average margins using consistent procedures
- Transaction-level records that provided greater detail and understanding of product composition within broad product lines and the ability to assess data quality



BLS data collection systems have limitations and do not always align with systems used by firms within their business operations

Challenges resulted from differences in firms' data structures and file formats



Constant review of microdata needed to ensure uniformity of product groupings

Firms' product assignments do not always line up with PPI classifications (ex. Eggs)

Firms can provide corporate datasets that support margin calculations



- Shifted from feasibility to repeatable production procedures integrated into existing PPI production processes
- Established procedures to support respondent initiation, data acquisition, data preparation, quality review, and ongoing monthly updates
- Balanced statistical quality, respondent burden, and operational needs



Standardization
and Flexibility



Integration into
initiation



Transformation into
statistical inputs



The work continues...



Scaling corporate data collection will require continued attention to workloads and resource allocation



Additional experiences with new firms and different industries will help us refine our approaches



Continued investment in technical training, documentation, analytical capabilities, and automation



Success depends not only on data availability but also the operational capabilities to use the data effectively

Contact Information

Katie Frawley

Chief, Section of Services

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<https://www.bls.gov/ppi/>

202-691-7020

frawley.kathleen@bls.gov

