

Bulletin

Canadian Data

April 2004 Retail Sales • Released June 25, 2004

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ATTENTION CANADIAN RETAILERS

The long anticipated - much desired changes to Canadian retail sales data has occurred. Statistics Canada has updated its retail classification system based on standard North American categories. Included in the changes are new categories as stores are re-aligned to reflect today's consumer shopping choices.

The most notable shift is the inclusion of many large big box stores, which were previously identified as wholesalers. The inclusion of stores such as Home Depot, RONA, and warehouse club stores will add billions in annual retail sales. In addition, computer and software stores and office supply stores (e.g., Staples) have been added. Some categories such as service related businesses (e.g., car washes and auto mechanics) have been taken out of the bulletin.

However, while breakouts in the apparel category have been available in the past, these similar breakouts between Men's, Women's, and Other Clothing Stores will not be available for approximately 12 months.

Added to that, within the next twelve months there will be further category break-outs available including Book Stores and News Dealers, Optical Goods Stores, Nursery Stores and Garden Centres, and Jewellery Stores among many others. In addition, quarterly detailed store category information is available for each province as well as Vancouver, Toronto, and Montreal.

WHAT DOES IT MEAN FOR YOU?

The boost to Canadian Retail Sales for April due to the shift of adding new store categories and taking some away has resulted in approximately \$1 billion extra in sales. What is interesting to note is that some stores, which were previously omitted, are in some of the highest growth store categories. Other General Merchandise Stores, which includes Warehouse Clubs and Superstores, grew by 13.3% over last April. Miscellaneous Store Retailers, which includes Office Supply Stores, grew by 19.8% over last April. While this is impressive, it is slower than their year-to-date growth of 22.0%.

On a year-over-year basis, retail sales growth appears notable and the Canadian economy has been relatively strong. However, last April was a particularly weak month primarily due to the SARS outbreak. While a number of store categories are off their year-to-date

average growth rates and last year was a weak comparison, generally, the news is positive for most retailers.

The one big caveat is that Ontario continues to lag all other regions in sales growth. The higher Canadian dollar and slower export market has taken a toll on consumers in that province.

A RETAILER'S GUIDE TO E-CATALOGUES

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RELEASE DATE OF THE NEXT NATIONAL RETAIL BULLETIN

July 26, 2004

Please note:

The J.C. Williams Group National Retail Bulletin compares the latest monthly release of "raw" (i.e., unadjusted for seasonality) retail sales figures to those in the *same calendar month of the previous year*. Statistics Canada also reports seasonally adjusted sales that are compared to the *previous month within the current calendar year* to measure change in Gross Domestic Product (GDP). Although other sources use seasonally adjusted figures, J.C. Williams Group believes that using raw figures and making comparisons to the previous year's performance more accurately reflects the seasonality of the retail industry and, therefore, are more useful in analysis.

J.C. WILLIAMS GROUP

Retail Sales by Store Category

Sales for the Month of: April	2004	2003	2004/2003
All Stores	28,593.4	27,028.4	5.8%
Automotive	10,377.6	10,123.1	2.5%
All Stores Less Automotive	18,215.9	16,905.2	7.8%
Food and Beverage Stores	6,528.3	6,251.4	4.4%
Pharmacies and Personal Care Stores	1,861.7	1,708.6	9.0%
All Stores Less Automotive, Food, Pharmacies	11,687.6	10,653.8	9.7%
General Merchandise Stores	3,346.7	3,015.2	11.0%
Department Stores	1,688.1	1,551.1	8.8%
Other General Merchandise Stores	1,658.6	1,464.1	13.3%
Furniture, Home Furnishings and Electronics Stores	1,779.0	1,629.1	9.2%
Furniture and Home Furnishings Stores	999.7	876.6	14.0%
Computer, Software, Home Electronics, and Appliance Stores	779.3	752.5	7.5%
Clothing and Accessories Stores	1,569.7	1,468.9	6.9%
Clothing Stores	1,197.8	1,114.2	7.5%
Shoes, Clothing Accessories, and Jewellery Stores	371.9	354.7	4.8%
Sporting Goods, Hobby, Music, and Book Stores	666.8	632.7	5.4%
Building and Outdoor Home Supplies Stores	1,707.6	1,567.8	8.9%
Miscellaneous Store Retailers	756.2	631.4	19.8%

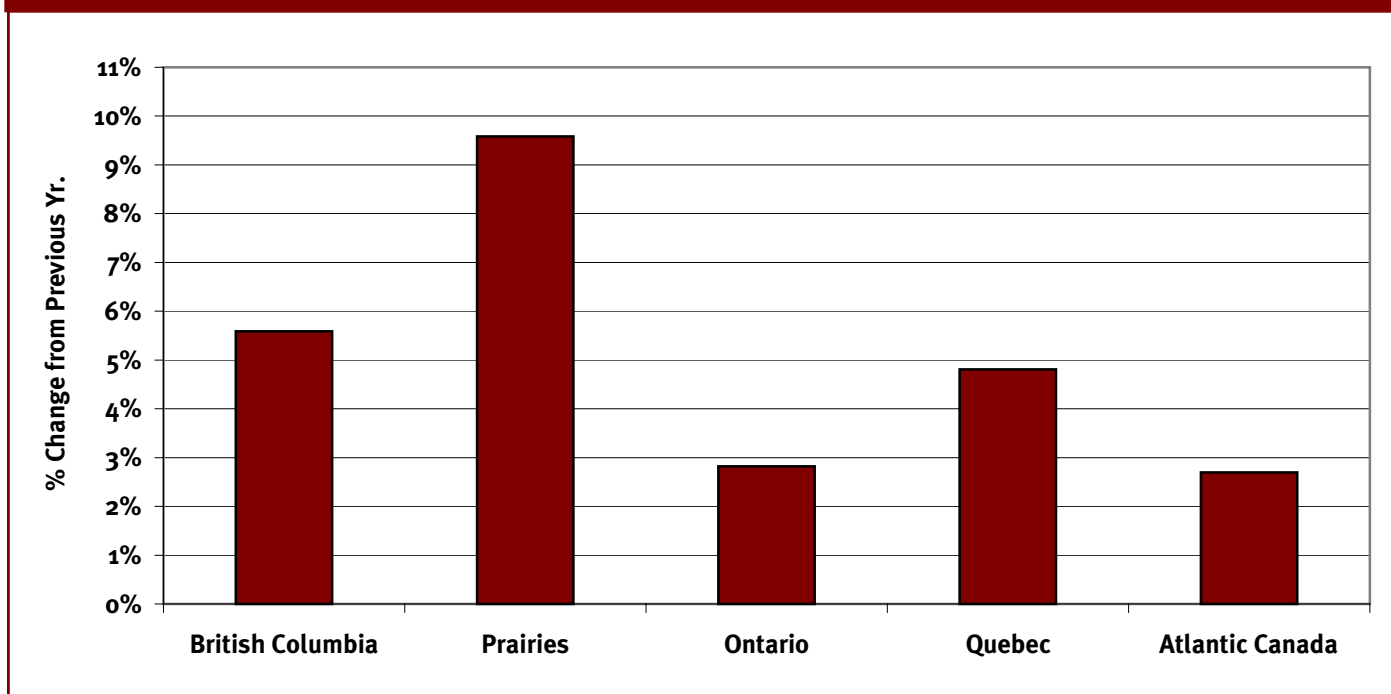
Year-to-date Sales	2004	2003	2004/2003
All Stores	102,385.9	97,643.1	4.9%
Automotive	35,672.9	35,553.6	0.3%
All Stores Less Automotive	66,713.0	62,089.5	7.4%
Food and Beverage Stores	24,968.1	23,906.2	4.4%
Pharmacies and Personal Care Stores	7,321.6	6,693.3	9.4%
All Stores Less Automotive, Food, Pharmacies	41,745.0	38,183.3	9.3%
General Merchandise Stores	11,501.2	10,582.0	8.7%
Department Stores	5,834.1	5,384.1	8.4%
Other General Merchandise Stores	5,667.1	5,197.9	13.2%
Furniture, Home Furnishings and Electronics Stores	6,924.1	6,311.4	9.7%
Furniture and Home Furnishings Stores	3,709.1	3,278.0	13.2%
Computer, Software, Home Electronics, and Appliance Stores	3,215.0	3,033.4	6.0%
Clothing and Accessories Stores	5,369.8	5,084.1	5.6%
Clothing Stores	4,066.0	3,820.1	6.4%
Shoes, Clothing Accessories, and Jewellery Stores	1,303.7	1,264.0	3.1%
Sporting Goods, Hobby, Music, and Book Stores	2,487.1	2,394.0	3.9%
Building and Outdoor Home Supplies Stores	5,231.3	4,733.2	10.5%
Miscellaneous Store Retailers	2,910.0	2,385.2	22.0%

ALL DOLLAR VALUES EXPRESSED IN MILLIONS OF CANADIAN DOLLARS; UNADJUSTED FIGURES; SOURCE: STATISTICS CANADA

Retail Trade, Canada, All Stores, by Region

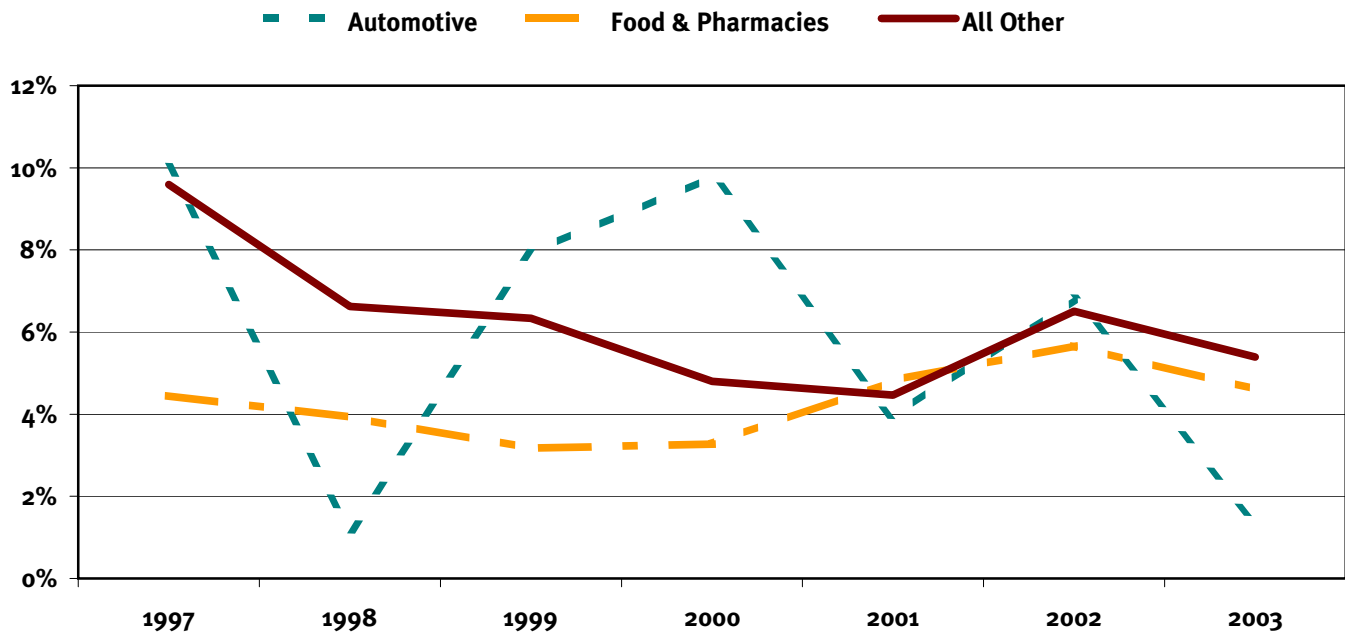
	Year-to-date 2004	Same Period 2003	Change 2004/2003
British Columbia	14,058.5	13,314.1	5.6%
Prairies	19,482.3	17,779.0	9.6%
Ontario	37,820.6	36,782.7	2.8%
Quebec	23,314.2	22,244.5	4.8%
Atlantic Canada	7,353.6	7,160.7	2.7%

Percentage Change in Retail Trade, All Stores, By Region Year-to-date Compared to Same Period Last Year

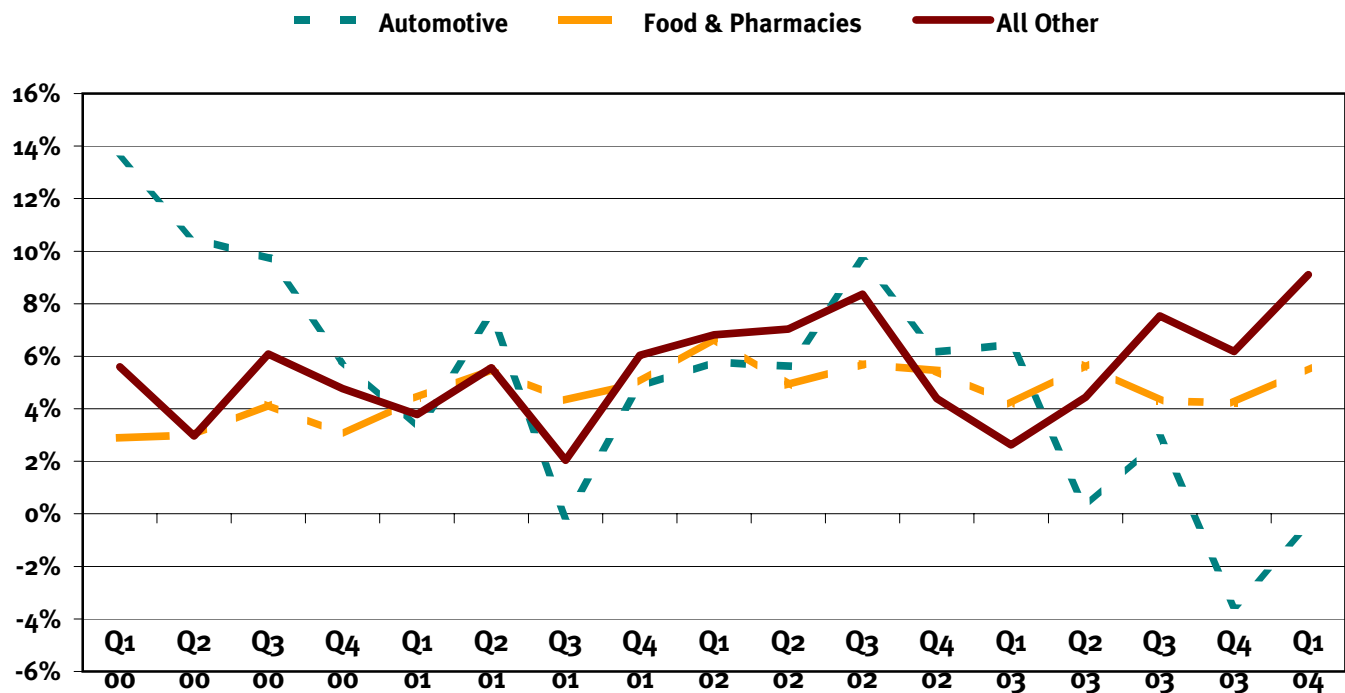


For more detailed information on retail sales, please contact J.C. Williams Group

Canadian Retail Sales by Major Product Category, Year Over Year (1997-2003)



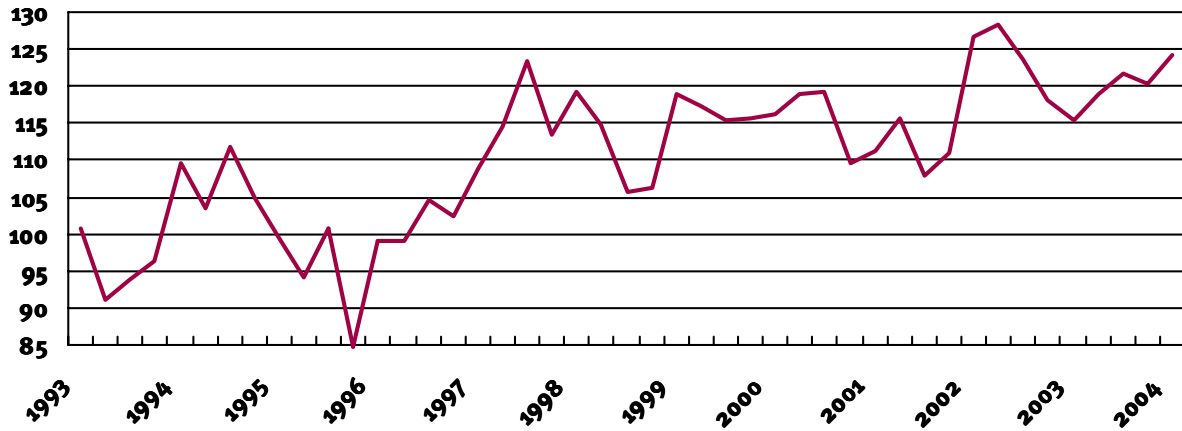
Canadian Retail Sales by Major Product Category, From the Same Quarter a Year Earlier



Consumer Price Index

May 2004 vs. May 2003 2.5%

Canadian Consumer Confidence Index 1993-2004



Source: Conference Board of Canada

Canadian Consumer Expenditures Index 1992 - 2003

