

BY THE NUMBERS

Fastest-growing retailers (1999–2004)

	Format	5-year sales growth
1	Roundy's (U.S.)	Supermarket 56.7%
2	Jean Coutu Group (Canada)	Pharmacy 55.0
3	Katz Group (Canada)	Pharmacy 49.0
4	Kintetsu (Japan)	Department store 48.9
5	Alimentation Couche-Tard (Canada)	Convenience store 45.4
6	Amazon.com (U.S.)	Internet miscellaneous 33.4
7	William Morrison (U.K.)	Supermarket 32.9
8	A.S. Watson Group (Hong Kong)	Multiformat 32.5
9	The Sports Authority (U.S.)	Sporting goods 18.1
10	Falabella (Chile)	Multiformat 17.9

Source: Deloitte

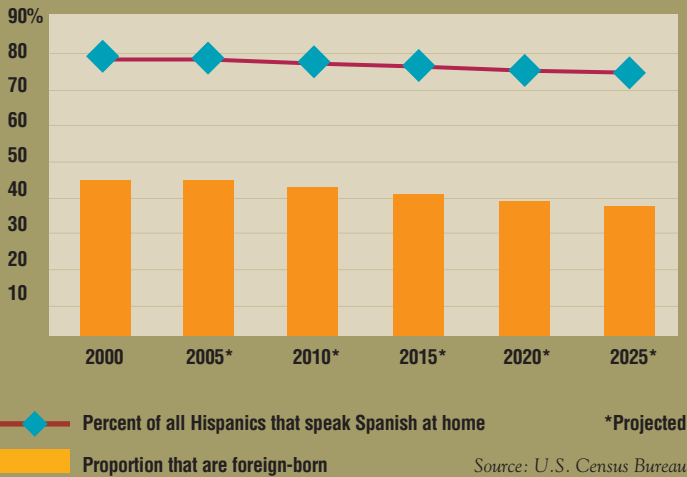
Retail sales per capita (2004)



The Gulf Cooperation Council comprises Bahrain, Kuwait, Oman, Qatar, Saudi Arabia and United Arab Emirates.

Sources: ICSC, Retail International

U.S. Hispanic population

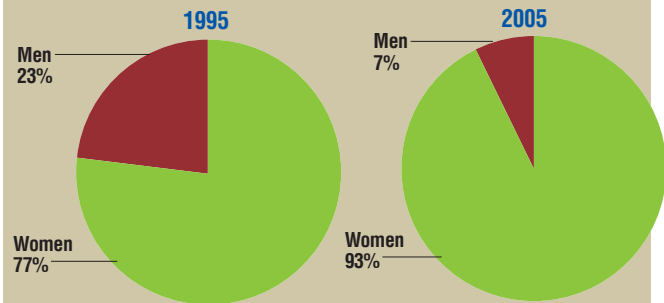


Source: U.S. Census Bureau

Fewer good men

The number has been dropping gradually but consistently each year since 1995, according to surveys of about 72,000 consumers.

Department store shoppers



Sources: America's Research Group, ICSC

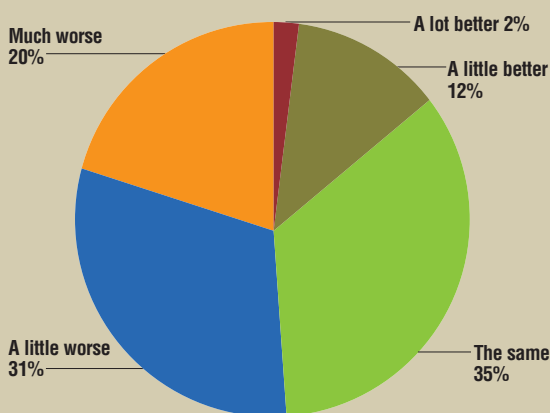
Destined for development? U.S. markets most promising to retail developers

	GLA per capita (2005)	Proj yearly population growth (2005–2010)	Proj yearly income growth (2005–2010)	Household income growth above U.S. avg (2005–2010)	
1	Portland, Ore.	15.61 sf	1.56%	4.30%	2.44%
2	Minneapolis–St. Paul	16.10	1.09	4.01	1.01
3	Sacramento, Calif.	17.45	2.34	5.54	8.66
4	Salt Lake City	19.19	1.11	4.19	1.89
5	Nashville, Tenn.	19.62	1.32	4.13	1.61
6	Houston	19.75	2.10	5.08	6.38
7	San Antonio	19.79	1.72	4.72	4.54
8	San Diego	20.18	1.28	4.53	3.60
9	Riverside, San Bernardino, Ontario (Calif.)	20.65	2.78	5.34	7.64
10	Oklahoma City	21.02	1.05	4.03	1.12
U.S. average	18.19 sf	1.10%	3.81%		

Research shows Minneapolis, Portland, Ore., and Sacramento, Calif., could be the last major U.S. markets with significant growth potential. Of the three markets with lower than the national average of GLA per capita, Sacramento has the highest projected future income growth.

Sources: Claritas, National Research Bureau/CoStar Group

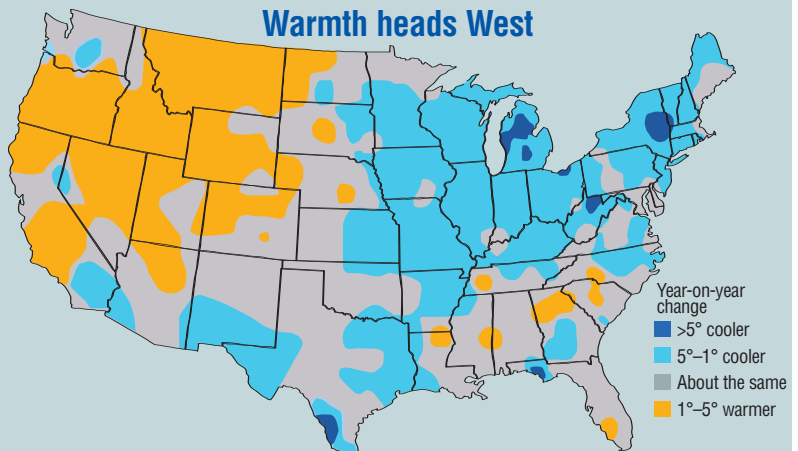
So how's the service?



Most U.S. shoppers say customer service has declined, according to a survey of more than 7,000 consumers.

Source: BIGResearch

Warmth heads West



This June warm weather will affect the Pacific Northwest and the Southeast. A much cooler and wetter pattern in the Great Lakes and Northeast will dampen demand in those regions, where excess inventory and markdowns are almost certain. Lawn and garden product sales are likely to benefit, as they were hurt last year by the severe drought in the central states.

Source: SDI/Weather Trends