
World Retail Data & Statistics

6th edition

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Table of Contents

Introduction	1
Table 0.1 Exchange rates against US\$ 2004-2009	4
Section one Socio-economic parameters	9
Population	11
Table 1.1 Total Population (National Estimates at January 1st) 2004-2009	11
Table 1.2 Population Aged 0-14: January 1st 2004-2009	12
Table 1.3 Population Aged 15-64: January 1st 2004-2009	13
Table 1.4 Population Aged 65+: January 1st 2004-2009	14
GDP	15
Table 1.5 Retail Sales as a Proportion of GDP 2004-2009	15
Labour Force Indicators	16
Table 1.6 Population in Employment 2004-2009	16
Table 1.7 Trends in Unemployment Rate 2004-2009	17
Table 1.8 Employment in Retailing as a Proportion of National Employment 2004-2009	18
Consumer Expenditure	19
Table 1.9 Per Capita Trends in Total Consumer Expenditure 2004-2009	19
Table 1.10 Real Growth in Total Consumer Expenditure 2004-2009	20
Table 1.11 Retail Sales as a Proportion of Consumer Expenditure 2004-2009	21
Consumer Prices and Costs	22
Table 1.12 Index of Consumer Prices 2004-2009	22
Table 1.13 Index of Food and Non-Alcoholic Beverage Prices 2004-2009	23
Household Characteristics	24
Table 1.14 Number of Households 2004-2009	24
Table 1.15 Average Number of Occupants per Household 2004-2009	25
Internet Characteristics	26
Table 1.16 Internet Users 2004-2009	26
Table 1.17 Internet Subscribers 2009	27
Table 1.18 Per Household Internet Retail Sales 2004-2009	28
Section two World retailing trends	29
Retail Sales	31
Table 2.1 Trends in Total Retail Sales 2004-2009	31
Table 2.2 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2009	32
Number of Retail Outlets	33
Table 2.3 Trends in Total Number of Retail Outlets 2004-2009	33
Table 2.4 Total Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2009	34
Table 2.5 Trends in Number of Grocery Retailer Outlets 2004-2009	35
Table 2.6 Trends in Number of Non-Grocery Retailer Outlets 2004-2009	36
Grocery Retailer Sales	37
Table 2.7 Trends in Retail Sales through Grocery Retailers 2004-2009	37
Table 2.8 Retail Sales through Grocery Retailers by Type 2009	38
Table 2.9 Retail Sales through Grocery Retailers by Type: % Analysis 2009	39
Non-Grocery Retailer Sales	40
Table 2.10 Trends in Retail Sales through Non-Grocery Retailers 2004-2009	40
Table 2.11 Retail Sales through Non-Grocery Retailers by Type 2009	41
Table 2.12 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2009	42
Table 2.13 Retail Sales through Mixed Retailers by Type 2009	43
Table 2.14 Retail Sales through Mixed Retailers by Type: % Analysis 2009	44
Non-Store Retailer Sales	45
Table 2.15 Trends in Retail Sales through Non-Store Retailers 2004-2009	45
Table 2.16 Retail Sales through Non-Store Retailers by Type 2009	46
Table 2.17 Retail Sales through Non-Store Retailers by Type: % Analysis 2009	47
Section three World retail rankings	49
Rankings	51
Table 3.1 Total Retail Sales 2009	51
Table 3.2 Total Retail Sales per Capita 2009	51
Table 3.3 Grocery Retail Sales per Capita 2009	52
Table 3.4 Non-Grocery Retail Sales per Capita 2009	52
Table 3.5 Retail Sales as a Proportion of GDP 2009	53
Table 3.6 Retail Sales as a Proportion of Consumer Expenditure 2009	53
Table 3.7 Total Retail Sales Growth at Constant Prices 2004-2009	54
Table 3.8 Grocery Retail Sales Growth at Constant Prices 2004-2009	54

Table 3.9 Non-Grocery Retail Sales Growth at Constant Prices 2004-2009	55
Table 3.10 Number of Retail Outlets per Million Inhabitants 2009	55
Table 3.11 Concentration of Grocery Retailers 2009	56
Table 3.12 Concentration of Non-Grocery Retailers 2009	56
Table 3.13 Non-Store Retailing Sales per Capita 2009	57
Table 3.14 Non-Store Retailing Sales Growth at Constant Prices 2004-2009	57

Section four Country snapshots 59

Argentina	61
Socio-Economic Parameters	61
Table 4.1 Selected Socio-Economic Parameters 2004-2009	61
Retail Sales	61
Table 4.2 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	61
Table 4.3 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	61
Table 4.4 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	61
Number of Retail Outlets	61
Table 4.5 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	61
Table 4.6 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	61
Table 4.7 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	62
Grocery Retailer Sales	62
Table 4.8 Retail Sales through Grocery Retailers by Type 2004-2009	62
Table 4.9 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	62
Table 4.10 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	62
Non-Grocery Retailer Sales	62
Table 4.11 Retail Sales through Non-Grocery Retailers by Type 2004-2009	62
Table 4.12 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	62
Table 4.13 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	63
Table 4.14 Retail Sales through Mixed Retailers by Type 2004-2009	63
Table 4.15 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	63
Table 4.16 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	63
Table 4.17 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	63
Table 4.18 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	63
Non-Store Retailing Sales	64
Table 4.19 Retail Sales through Non-Store Retailing by Type 2004-2009	64
Table 4.20 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	64
Table 4.21 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	64
Australia	65
Socio-Economic Parameters	65
Table 4.22 Selected Socio-Economic Parameters 2004-2009	65
Retail Sales	65
Table 4.23 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	65
Table 4.24 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	65
Table 4.25 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	65
Number of Retail Outlets	65
Table 4.26 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	65
Table 4.27 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	65
Table 4.28 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	66
Grocery Retailer Sales	66
Table 4.29 Retail Sales through Grocery Retailers by Type 2004-2009	66
Table 4.30 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	66
Table 4.31 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	66
Non-Grocery Retailer Sales	66
Table 4.32 Retail Sales through Non-Grocery Retailers by Type 2004-2009	66
Table 4.33 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	66
Table 4.34 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	67
Table 4.35 Retail Sales through Mixed Retailers by Type 2004-2009	67
Table 4.36 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	67
Table 4.37 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	67
Table 4.38 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	67
Table 4.39 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	67
Non-Store Retailing Sales	68
Table 4.40 Retail Sales through Non-Store Retailing by Type 2004-2009	68
Table 4.41 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	68
Table 4.42 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	68
Austria	69
Socio-Economic Parameters	69
Table 4.43 Selected Socio-Economic Parameters 2004-2009	69
Retail Sales	69
Table 4.44 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	69
Table 4.45 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	69
Table 4.46 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	69
Number of Retail Outlets	69
Table 4.47 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	69
Table 4.48 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	69
Table 4.49 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	70
Grocery Retailer Sales	70
Table 4.50 Retail Sales through Grocery Retailers by Type 2004-2009	70
Table 4.51 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	70
Table 4.52 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	70
Non-Grocery Retailer Sales	70
Table 4.53 Retail Sales through Non-Grocery Retailers by Type 2004-2009	70
Table 4.54 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	70
Table 4.55 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	71
Table 4.56 Retail Sales through Mixed Retailers by Type 2004-2009	71
Table 4.57 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	71
Table 4.58 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	71
Table 4.59 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	71
Table 4.60 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	71
Non-Store Retailing Sales	72
Table 4.61 Retail Sales through Non-Store Retailing by Type 2004-2009	72
Table 4.62 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	72

Table 4.63 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	72
Belgium	73
Socio-Economic Parameters	73
Table 4.64 Selected Socio-Economic Parameters 2004-2009	73
Retail Sales	73
Table 4.65 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	73
Table 4.66 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	73
Table 4.67 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	73
Number of Retail Outlets	73
Table 4.68 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	73
Table 4.69 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	73
Table 4.70 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	74
Grocery Retailer Sales	74
Table 4.71 Retail Sales through Grocery Retailers by Type 2004-2009	74
Table 4.72 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	74
Table 4.73 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	74
Non-Grocery Retailer Sales	74
Table 4.74 Retail Sales through Non-Grocery Retailers by Type 2004-2009	74
Table 4.75 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	74
Table 4.76 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	75
Table 4.77 Retail Sales through Mixed Retailers by Type 2004-2009	75
Table 4.78 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	75
Table 4.79 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	75
Table 4.80 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	75
Table 4.81 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	75
Non-Store Retailing Sales	76
Table 4.82 Retail Sales through Non-Store Retailing by Type 2004-2009	76
Table 4.83 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	76
Table 4.84 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	76
Brazil	77
Socio-Economic Parameters	77
Table 4.85 Selected Socio-Economic Parameters 2004-2009	77
Retail Sales	77
Table 4.86 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	77
Table 4.87 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	77
Table 4.88 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	77
Number of Retail Outlets	77
Table 4.89 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	77
Table 4.90 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	77
Table 4.91 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	78
Grocery Retailer Sales	78
Table 4.92 Retail Sales through Grocery Retailers by Type 2004-2009	78
Table 4.93 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	78
Table 4.94 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	78
Non-Grocery Retailer Sales	78
Table 4.95 Retail Sales through Non-Grocery Retailers by Type 2004-2009	78
Table 4.96 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	78
Table 4.97 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	79
Table 4.98 Retail Sales through Mixed Retailers by Type 2004-2009	79
Table 4.99 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	79
Table 4.100 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	79
Table 4.101 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	79
Table 4.102 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	79
Non-Store Retailing Sales	80
Table 4.103 Retail Sales through Non-Store Retailing by Type 2004-2009	80
Table 4.104 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	80
Table 4.105 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	80
Bulgaria	81
Socio-Economic Parameters	81
Table 4.106 Selected Socio-Economic Parameters 2004-2009	81
Retail Sales	81
Table 4.107 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	81
Table 4.108 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	81
Table 4.109 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	81
Number of Retail Outlets	81
Table 4.110 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	81
Table 4.111 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	81
Table 4.112 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	82
Grocery Retailer Sales	82
Table 4.113 Retail Sales through Grocery Retailers by Type 2004-2009	82
Table 4.114 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	82
Table 4.115 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	82
Non-Grocery Retailer Sales	82
Table 4.116 Retail Sales through Non-Grocery Retailers by Type 2004-2009	82
Table 4.117 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	82
Table 4.118 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	83
Table 4.119 Retail Sales through Mixed Retailers by Type 2004-2009	83
Table 4.120 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	83
Table 4.121 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	83
Table 4.122 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	83
Table 4.123 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	83
Non-Store Retailing Sales	84
Table 4.124 Retail Sales through Non-Store Retailing by Type 2004-2009	84
Table 4.125 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	84
Table 4.126 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	84
Canada	85
Socio-Economic Parameters	85
Table 4.127 Selected Socio-Economic Parameters 2004-2009	85
Retail Sales	85
Table 4.128 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	85
Table 4.129 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	85
Table 4.130 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	85

Number of Retail Outlets	85
Table 4.131 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	85
Table 4.132 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	85
Table 4.133 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	86
Grocery Retailer Sales	86
Table 4.134 Retail Sales through Grocery Retailers by Type 2004-2009	86
Table 4.135 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	86
Table 4.136 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	86
Non-Grocery Retailer Sales	86
Table 4.137 Retail Sales through Non-Grocery Retailers by Type 2004-2009	86
Table 4.138 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	86
Table 4.139 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	87
Table 4.140 Retail Sales through Mixed Retailers by Type 2004-2009	87
Table 4.141 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	87
Table 4.142 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	87
Table 4.143 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	87
Table 4.144 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	87
Non-Store Retailing Sales	88
Table 4.145 Retail Sales through Non-Store Retailing by Type 2004-2009	88
Table 4.146 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	88
Table 4.147 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	88
Chile	89
Socio-Economic Parameters	89
Table 4.148 Selected Socio-Economic Parameters 2004-2009	89
Retail Sales	89
Table 4.149 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	89
Table 4.150 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	89
Table 4.151 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	89
Number of Retail Outlets	89
Table 4.152 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	89
Table 4.153 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	89
Table 4.154 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	90
Grocery Retailer Sales	90
Table 4.155 Retail Sales through Grocery Retailers by Type 2004-2009	90
Table 4.156 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	90
Table 4.157 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	90
Non-Grocery Retailer Sales	90
Table 4.158 Retail Sales through Non-Grocery Retailers by Type 2004-2009	90
Table 4.159 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	90
Table 4.160 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	91
Table 4.161 Retail Sales through Mixed Retailers by Type 2004-2009	91
Table 4.162 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	91
Table 4.163 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	91
Table 4.164 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	91
Table 4.165 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	91
Non-Store Retailing Sales	92
Table 4.166 Retail Sales through Non-Store Retailing by Type 2004-2009	92
Table 4.167 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	92
Table 4.168 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	92
China	93
Socio-Economic Parameters	93
Table 4.169 Selected Socio-Economic Parameters 2004-2009	93
Retail Sales	93
Table 4.170 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	93
Table 4.171 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	93
Table 4.172 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	93
Number of Retail Outlets	93
Table 4.173 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	93
Table 4.174 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	93
Table 4.175 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	94
Grocery Retailer Sales	94
Table 4.176 Retail Sales through Grocery Retailers by Type 2004-2009	94
Table 4.177 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	94
Table 4.178 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	94
Non-Grocery Retailer Sales	94
Table 4.179 Retail Sales through Non-Grocery Retailers by Type 2004-2009	94
Table 4.180 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	94
Table 4.181 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	95
Table 4.182 Retail Sales through Mixed Retailers by Type 2004-2009	95
Table 4.183 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	95
Table 4.184 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	95
Table 4.185 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	95
Table 4.186 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	95
Non-Store Retailing Sales	96
Table 4.187 Retail Sales through Non-Store Retailing by Type 2004-2009	96
Table 4.188 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	96
Table 4.189 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	96
Colombia	97
Socio-Economic Parameters	97
Table 4.190 Selected Socio-Economic Parameters 2004-2009	97
Retail Sales	97
Table 4.191 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	97
Table 4.192 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	97
Table 4.193 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	97
Number of Retail Outlets	97
Table 4.194 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	97
Table 4.195 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	97
Table 4.196 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	98
Grocery Retailer Sales	98
Table 4.197 Retail Sales through Grocery Retailers by Type 2004-2009	98
Table 4.198 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	98
Table 4.199 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	98

Non-Grocery Retailer Sales	98
Table 4.200 Retail Sales through Non-Grocery Retailers by Type 2004-2009.....	98
Table 4.201 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009.....	98
Table 4.202 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009.....	99
Table 4.203 Retail Sales through Mixed Retailers by Type 2004-2009.....	99
Table 4.204 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009.....	99
Table 4.205 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009.....	99
Table 4.206 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009.....	99
Table 4.207 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009.....	99
Non-Store Retailing Sales	100
Table 4.208 Retail Sales through Non-Store Retailing by Type 2004-2009.....	100
Table 4.209 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009.....	100
Table 4.210 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009.....	100
Czech Republic	101
Socio-Economic Parameters	101
Table 4.211 Selected Socio-Economic Parameters 2004-2009.....	101
Retail Sales	101
Table 4.212 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009.....	101
Table 4.213 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009.....	101
Table 4.214 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009.....	101
Number of Retail Outlets	101
Table 4.215 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009.....	101
Table 4.216 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009.....	101
Table 4.217 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009.....	102
Grocery Retailer Sales	102
Table 4.218 Retail Sales through Grocery Retailers by Type 2004-2009.....	102
Table 4.219 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009.....	102
Table 4.220 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009.....	102
Non-Grocery Retailer Sales	102
Table 4.221 Retail Sales through Non-Grocery Retailers by Type 2004-2009.....	102
Table 4.222 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009.....	102
Table 4.223 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009.....	103
Table 4.224 Retail Sales through Mixed Retailers by Type 2004-2009.....	103
Table 4.225 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009.....	103
Table 4.226 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009.....	103
Table 4.227 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009.....	103
Table 4.228 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009.....	103
Non-Store Retailing Sales	104
Table 4.229 Retail Sales through Non-Store Retailing by Type 2004-2009.....	104
Table 4.230 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009.....	104
Table 4.231 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009.....	104
Denmark	105
Socio-Economic Parameters	105
Table 4.232 Selected Socio-Economic Parameters 2004-2009.....	105
Retail Sales	105
Table 4.233 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009.....	105
Table 4.234 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009.....	105
Table 4.235 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009.....	105
Number of Retail Outlets	105
Table 4.236 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009.....	105
Table 4.237 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009.....	105
Table 4.238 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009.....	106
Grocery Retailer Sales	106
Table 4.239 Retail Sales through Grocery Retailers by Type 2004-2009.....	106
Table 4.240 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009.....	106
Table 4.241 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009.....	106
Non-Grocery Retailer Sales	106
Table 4.242 Retail Sales through Non-Grocery Retailers by Type 2004-2009.....	106
Table 4.243 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009.....	106
Table 4.244 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009.....	107
Table 4.245 Retail Sales through Mixed Retailers by Type 2004-2009.....	107
Table 4.246 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009.....	107
Table 4.247 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009.....	107
Table 4.248 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009.....	107
Table 4.249 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009.....	107
Non-Store Retailing Sales	108
Table 4.250 Retail Sales through Non-Store Retailing by Type 2004-2009.....	108
Table 4.251 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009.....	108
Table 4.252 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009.....	108
Egypt	109
Socio-Economic Parameters	109
Table 4.253 Selected Socio-Economic Parameters 2004-2009.....	109
Retail Sales	109
Table 4.254 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009.....	109
Table 4.255 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009.....	109
Table 4.256 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009.....	109
Number of Retail Outlets	109
Table 4.257 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009.....	109
Table 4.258 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009.....	109
Table 4.259 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009.....	110
Grocery Retailer Sales	110
Table 4.260 Retail Sales through Grocery Retailers by Type 2004-2009.....	110
Table 4.261 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009.....	110
Table 4.262 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009.....	110
Non-Grocery Retailer Sales	110
Table 4.263 Retail Sales through Non-Grocery Retailers by Type 2004-2009.....	110
Table 4.264 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009.....	110
Table 4.265 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009.....	111
Table 4.266 Retail Sales through Mixed Retailers by Type 2004-2009.....	111
Table 4.267 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009.....	111
Table 4.268 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009.....	111
Table 4.269 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009.....	111
Table 4.270 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009.....	111

Non-Store Retailing Sales	112
Table 4.271 Retail Sales through Non-Store Retailing by Type 2004-2009	112
Table 4.272 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009.....	112
Table 4.273 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	112
Finland	113
Socio-Economic Parameters	113
Table 4.274 Selected Socio-Economic Parameters 2004-2009	113
Retail Sales	113
Table 4.275 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	113
Table 4.276 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	113
Table 4.277 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	113
Number of Retail Outlets	113
Table 4.278 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	113
Table 4.279 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	113
Table 4.280 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	114
Grocery Retailer Sales	114
Table 4.281 Retail Sales through Grocery Retailers by Type 2004-2009	114
Table 4.282 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	114
Table 4.283 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	114
Non-Grocery Retailer Sales	114
Table 4.284 Retail Sales through Non-Grocery Retailers by Type 2004-2009.....	114
Table 4.285 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	114
Table 4.286 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	115
Table 4.287 Retail Sales through Mixed Retailers by Type 2004-2009	115
Table 4.288 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009.....	115
Table 4.289 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	115
Table 4.290 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	115
Table 4.291 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	115
Non-Store Retailing Sales	116
Table 4.292 Retail Sales through Non-Store Retailing by Type 2004-2009	116
Table 4.293 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009.....	116
Table 4.294 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	116
France	117
Socio-Economic Parameters	117
Table 4.295 Selected Socio-Economic Parameters 2004-2009	117
Retail Sales	117
Table 4.296 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	117
Table 4.297 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	117
Table 4.298 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	117
Number of Retail Outlets	117
Table 4.299 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	117
Table 4.300 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	117
Table 4.301 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	118
Grocery Retailer Sales	118
Table 4.302 Retail Sales through Grocery Retailers by Type 2004-2009	118
Table 4.303 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	118
Table 4.304 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	118
Non-Grocery Retailer Sales	118
Table 4.305 Retail Sales through Non-Grocery Retailers by Type 2004-2009.....	118
Table 4.306 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	118
Table 4.307 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	119
Table 4.308 Retail Sales through Mixed Retailers by Type 2004-2009	119
Table 4.309 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009.....	119
Table 4.310 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	119
Table 4.311 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	119
Table 4.312 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	119
Non-Store Retailing Sales	120
Table 4.313 Retail Sales through Non-Store Retailing by Type 2004-2009	120
Table 4.314 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009.....	120
Table 4.315 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	120
Germany	121
Socio-Economic Parameters	121
Table 4.316 Selected Socio-Economic Parameters 2004-2009	121
Retail Sales	121
Table 4.317 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	121
Table 4.318 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	121
Table 4.319 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	121
Number of Retail Outlets	121
Table 4.320 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	121
Table 4.321 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	121
Table 4.322 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	122
Grocery Retailer Sales	122
Table 4.323 Retail Sales through Grocery Retailers by Type 2004-2009	122
Table 4.324 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	122
Table 4.325 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	122
Non-Grocery Retailer Sales	122
Table 4.326 Retail Sales through Non-Grocery Retailers by Type 2004-2009.....	122
Table 4.327 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	122
Table 4.328 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	123
Table 4.329 Retail Sales through Mixed Retailers by Type 2004-2009	123
Table 4.330 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009.....	123
Table 4.331 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	123
Table 4.332 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	123
Table 4.333 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	123
Non-Store Retailing Sales	124
Table 4.334 Retail Sales through Non-Store Retailing by Type 2004-2009	124
Table 4.335 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009.....	124
Table 4.336 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	124
Greece	125
Socio-Economic Parameters	125
Table 4.337 Selected Socio-Economic Parameters 2004-2009	125

Retail Sales	125
Table 4.338 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	125
Table 4.339 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	125
Table 4.340 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	125
Number of Retail Outlets	125
Table 4.341 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	125
Table 4.342 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	125
Table 4.343 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	126
Grocery Retailer Sales	126
Table 4.344 Retail Sales through Grocery Retailers by Type 2004-2009	126
Table 4.345 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	126
Table 4.346 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	126
Non-Grocery Retailer Sales	126
Table 4.347 Retail Sales through Non-Grocery Retailers by Type 2004-2009	126
Table 4.348 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	126
Table 4.349 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	127
Table 4.350 Retail Sales through Mixed Retailers by Type 2004-2009	127
Table 4.351 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	127
Table 4.352 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	127
Table 4.353 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	127
Table 4.354 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	127
Non-Store Retailing Sales	128
Table 4.355 Retail Sales through Non-Store Retailing by Type 2004-2009	128
Table 4.356 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	128
Table 4.357 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	128
Hong Kong, China	129
Socio-Economic Parameters	129
Table 4.358 Selected Socio-Economic Parameters 2004-2009	129
Retail Sales	129
Table 4.359 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	129
Table 4.360 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	129
Table 4.361 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	129
Number of Retail Outlets	129
Table 4.362 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	129
Table 4.363 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	129
Table 4.364 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	130
Grocery Retailer Sales	130
Table 4.365 Retail Sales through Grocery Retailers by Type 2004-2009	130
Table 4.366 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	130
Table 4.367 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	130
Non-Grocery Retailer Sales	130
Table 4.368 Retail Sales through Non-Grocery Retailers by Type 2004-2009	130
Table 4.369 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	130
Table 4.370 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	131
Table 4.371 Retail Sales through Mixed Retailers by Type 2004-2009	131
Table 4.372 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	131
Table 4.373 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	131
Table 4.374 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	131
Table 4.375 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	131
Non-Store Retailing Sales	132
Table 4.376 Retail Sales through Non-Store Retailing by Type 2004-2009	132
Table 4.377 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	132
Table 4.378 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	132
Hungary	133
Socio-Economic Parameters	133
Table 4.379 Selected Socio-Economic Parameters 2004-2009	133
Retail Sales	133
Table 4.380 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	133
Table 4.381 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	133
Table 4.382 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	133
Number of Retail Outlets	133
Table 4.383 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	133
Table 4.384 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	133
Table 4.385 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	134
Grocery Retailer Sales	134
Table 4.386 Retail Sales through Grocery Retailers by Type 2004-2009	134
Table 4.387 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	134
Table 4.388 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	134
Non-Grocery Retailer Sales	134
Table 4.389 Retail Sales through Non-Grocery Retailers by Type 2004-2009	134
Table 4.390 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	134
Table 4.391 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	135
Table 4.392 Retail Sales through Mixed Retailers by Type 2004-2009	135
Table 4.393 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	135
Table 4.394 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	135
Table 4.395 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	135
Table 4.396 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	135
Non-Store Retailing Sales	136
Table 4.397 Retail Sales through Non-Store Retailing by Type 2004-2009	136
Table 4.398 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	136
Table 4.399 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	136
India	137
Socio-Economic Parameters	137
Table 4.400 Selected Socio-Economic Parameters 2004-2009	137
Retail Sales	137
Table 4.401 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	137
Table 4.402 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	137
Table 4.403 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	137
Number of Retail Outlets	137
Table 4.404 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	137
Table 4.405 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	137
Table 4.406 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	138

Grocery Retailer Sales	138
Table 4.407 Retail Sales through Grocery Retailers by Type 2004-2009	138
Table 4.408 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	138
Table 4.409 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	138
Non-Grocery Retailer Sales	138
Table 4.410 Retail Sales through Non-Grocery Retailers by Type 2004-2009	138
Table 4.411 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	138
Table 4.412 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	139
Table 4.413 Retail Sales through Mixed Retailers by Type 2004-2009	139
Table 4.414 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	139
Table 4.415 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	139
Table 4.416 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	139
Table 4.417 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	139
Non-Store Retailing Sales	140
Table 4.418 Retail Sales through Non-Store Retailing by Type 2004-2009	140
Table 4.419 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	140
Table 4.420 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	140
Indonesia	141
Socio-Economic Parameters	141
Table 4.421 Selected Socio-Economic Parameters 2004-2009	141
Retail Sales	141
Table 4.422 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	141
Table 4.423 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	141
Table 4.424 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	141
Number of Retail Outlets	141
Table 4.425 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	141
Table 4.426 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	141
Table 4.427 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	142
Grocery Retailer Sales	142
Table 4.428 Retail Sales through Grocery Retailers by Type 2004-2009	142
Table 4.429 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	142
Table 4.430 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	142
Non-Grocery Retailer Sales	142
Table 4.431 Retail Sales through Non-Grocery Retailers by Type 2004-2009	142
Table 4.432 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	142
Table 4.433 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	143
Table 4.434 Retail Sales through Mixed Retailers by Type 2004-2009	143
Table 4.435 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	143
Table 4.436 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	143
Table 4.437 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	143
Table 4.438 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	143
Non-Store Retailing Sales	144
Table 4.439 Retail Sales through Non-Store Retailing by Type 2004-2009	144
Table 4.440 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	144
Table 4.441 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	144
Ireland	145
Socio-Economic Parameters	145
Table 4.442 Selected Socio-Economic Parameters 2004-2009	145
Retail Sales	145
Table 4.443 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	145
Table 4.444 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	145
Table 4.445 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	145
Number of Retail Outlets	145
Table 4.446 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	145
Table 4.447 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	145
Table 4.448 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	146
Grocery Retailer Sales	146
Table 4.449 Retail Sales through Grocery Retailers by Type 2004-2009	146
Table 4.450 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	146
Table 4.451 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	146
Non-Grocery Retailer Sales	146
Table 4.452 Retail Sales through Non-Grocery Retailers by Type 2004-2009	146
Table 4.453 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	146
Table 4.454 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	147
Table 4.455 Retail Sales through Mixed Retailers by Type 2004-2009	147
Table 4.456 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	147
Table 4.457 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	147
Table 4.458 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	147
Table 4.459 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	147
Non-Store Retailing Sales	148
Table 4.460 Retail Sales through Non-Store Retailing by Type 2004-2009	148
Table 4.461 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	148
Table 4.462 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	148
Israel	149
Socio-Economic Parameters	149
Table 4.463 Selected Socio-Economic Parameters 2004-2009	149
Retail Sales	149
Table 4.464 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	149
Table 4.465 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	149
Table 4.466 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	149
Number of Retail Outlets	149
Table 4.467 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	149
Table 4.468 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	149
Table 4.469 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	150
Grocery Retailer Sales	150
Table 4.470 Retail Sales through Grocery Retailers by Type 2004-2009	150
Table 4.471 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	150
Table 4.472 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	150
Non-Grocery Retailer Sales	150
Table 4.473 Retail Sales through Non-Grocery Retailers by Type 2004-2009	150
Table 4.474 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	150
Table 4.475 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	151
Table 4.476 Retail Sales through Mixed Retailers by Type 2004-2009	151

Table 4.477 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	151
Table 4.478 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	151
Table 4.479 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	151
Table 4.480 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	151
Non-Store Retailing Sales	152
Table 4.481 Retail Sales through Non-Store Retailing by Type 2004-2009	152
Table 4.482 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	152
Table 4.483 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	152
Italy	153
Socio-Economic Parameters	153
Table 4.484 Selected Socio-Economic Parameters 2004-2009	153
Retail Sales	153
Table 4.485 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	153
Table 4.486 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	153
Table 4.487 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	153
Number of Retail Outlets	153
Table 4.488 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	153
Table 4.489 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	153
Table 4.490 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	154
Grocery Retailer Sales	154
Table 4.491 Retail Sales through Grocery Retailers by Type 2004-2009	154
Table 4.492 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	154
Table 4.493 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	154
Non-Grocery Retailer Sales	154
Table 4.494 Retail Sales through Non-Grocery Retailers by Type 2004-2009	154
Table 4.495 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	154
Table 4.496 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	155
Table 4.497 Retail Sales through Mixed Retailers by Type 2004-2009	155
Table 4.498 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	155
Table 4.499 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	155
Table 4.500 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	155
Table 4.501 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	155
Non-Store Retailing Sales	156
Table 4.502 Retail Sales through Non-Store Retailing by Type 2004-2009	156
Table 4.503 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	156
Table 4.504 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	156
Japan	157
Socio-Economic Parameters	157
Table 4.505 Selected Socio-Economic Parameters 2004-2009	157
Retail Sales	157
Table 4.506 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	157
Table 4.507 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	157
Table 4.508 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	157
Number of Retail Outlets	157
Table 4.509 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	157
Table 4.510 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	157
Table 4.511 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	158
Grocery Retailer Sales	158
Table 4.512 Retail Sales through Grocery Retailers by Type 2004-2009	158
Table 4.513 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	158
Table 4.514 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	158
Non-Grocery Retailer Sales	158
Table 4.515 Retail Sales through Non-Grocery Retailers by Type 2004-2009	158
Table 4.516 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	158
Table 4.517 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	159
Table 4.518 Retail Sales through Mixed Retailers by Type 2004-2009	159
Table 4.519 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	159
Table 4.520 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	159
Table 4.521 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	159
Table 4.522 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	159
Non-Store Retailing Sales	160
Table 4.523 Retail Sales through Non-Store Retailing by Type 2004-2009	160
Table 4.524 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	160
Table 4.525 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	160
Malaysia	161
Socio-Economic Parameters	161
Table 4.526 Selected Socio-Economic Parameters 2004-2009	161
Retail Sales	161
Table 4.527 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	161
Table 4.528 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	161
Table 4.529 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	161
Number of Retail Outlets	161
Table 4.530 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	161
Table 4.531 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	161
Table 4.532 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	162
Grocery Retailer Sales	162
Table 4.533 Retail Sales through Grocery Retailers by Type 2004-2009	162
Table 4.534 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	162
Table 4.535 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	162
Non-Grocery Retailer Sales	162
Table 4.536 Retail Sales through Non-Grocery Retailers by Type 2004-2009	162
Table 4.537 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	162
Table 4.538 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	163
Table 4.539 Retail Sales through Mixed Retailers by Type 2004-2009	163
Table 4.540 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	163
Table 4.541 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	163
Table 4.542 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	163
Table 4.543 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	163
Non-Store Retailing Sales	164
Table 4.544 Retail Sales through Non-Store Retailing by Type 2004-2009	164
Table 4.545 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	164
Table 4.546 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	164

Mexico	165
Socio-Economic Parameters	165
Table 4.547 Selected Socio-Economic Parameters 2004-2009	165
Retail Sales	165
Table 4.548 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	165
Table 4.549 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	165
Table 4.550 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	165
Number of Retail Outlets	165
Table 4.551 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	165
Table 4.552 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	165
Table 4.553 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	166
Grocery Retailer Sales	166
Table 4.554 Retail Sales through Grocery Retailers by Type 2004-2009	166
Table 4.555 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	166
Table 4.556 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	166
Non-Grocery Retailer Sales	166
Table 4.557 Retail Sales through Non-Grocery Retailers by Type 2004-2009	166
Table 4.558 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	166
Table 4.559 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	167
Table 4.560 Retail Sales through Mixed Retailers by Type 2004-2009	167
Table 4.561 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	167
Table 4.562 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	167
Table 4.563 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	167
Table 4.564 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	167
Non-Store Retailing Sales	168
Table 4.565 Retail Sales through Non-Store Retailing by Type 2004-2009	168
Table 4.566 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	168
Table 4.567 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	168
Morocco	169
Socio-Economic Parameters	169
Table 4.568 Selected Socio-Economic Parameters 2004-2009	169
Retail Sales	169
Table 4.569 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	169
Table 4.570 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	169
Table 4.571 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	169
Number of Retail Outlets	169
Table 4.572 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	169
Table 4.573 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	169
Table 4.574 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	170
Grocery Retailer Sales	170
Table 4.575 Retail Sales through Grocery Retailers by Type 2004-2009	170
Table 4.576 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	170
Table 4.577 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	170
Non-Grocery Retailer Sales	170
Table 4.578 Retail Sales through Non-Grocery Retailers by Type 2004-2009	170
Table 4.579 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	170
Table 4.580 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	171
Table 4.581 Retail Sales through Mixed Retailers by Type 2004-2009	171
Table 4.582 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	171
Table 4.583 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	171
Table 4.584 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	171
Table 4.585 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	171
Non-Store Retailing Sales	172
Table 4.586 Retail Sales through Non-Store Retailing by Type 2004-2009	172
Table 4.587 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	172
Table 4.588 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	172
Netherlands	173
Socio-Economic Parameters	173
Table 4.589 Selected Socio-Economic Parameters 2004-2009	173
Retail Sales	173
Table 4.590 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	173
Table 4.591 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	173
Table 4.592 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	173
Number of Retail Outlets	173
Table 4.593 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	173
Table 4.594 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	173
Table 4.595 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	174
Grocery Retailer Sales	174
Table 4.596 Retail Sales through Grocery Retailers by Type 2004-2009	174
Table 4.597 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	174
Table 4.598 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	174
Non-Grocery Retailer Sales	174
Table 4.599 Retail Sales through Non-Grocery Retailers by Type 2004-2009	174
Table 4.600 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	174
Table 4.601 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	175
Table 4.602 Retail Sales through Mixed Retailers by Type 2004-2009	175
Table 4.603 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	175
Table 4.604 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	175
Table 4.605 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	175
Table 4.606 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	175
Non-Store Retailing Sales	176
Table 4.607 Retail Sales through Non-Store Retailing by Type 2004-2009	176
Table 4.608 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	176
Table 4.609 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	176
New Zealand	177
Socio-Economic Parameters	177
Table 4.610 Selected Socio-Economic Parameters 2004-2009	177
Retail Sales	177
Table 4.611 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	177
Table 4.612 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	177
Table 4.613 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	177

Number of Retail Outlets	177
Table 4.614 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009.....	177
Table 4.615 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009.....	177
Table 4.616 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009.....	178
Grocery Retailer Sales	178
Table 4.617 Retail Sales through Grocery Retailers by Type 2004-2009.....	178
Table 4.618 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009.....	178
Table 4.619 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009.....	178
Non-Grocery Retailer Sales	178
Table 4.620 Retail Sales through Non-Grocery Retailers by Type 2004-2009.....	178
Table 4.621 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009.....	178
Table 4.622 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009.....	179
Table 4.623 Retail Sales through Mixed Retailers by Type 2004-2009.....	179
Table 4.624 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009.....	179
Table 4.625 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009.....	179
Table 4.626 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009.....	179
Table 4.627 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009.....	179
Non-Store Retailing Sales	180
Table 4.628 Retail Sales through Non-Store Retailing by Type 2004-2009.....	180
Table 4.629 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009.....	180
Table 4.630 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009.....	180
Norway	181
Socio-Economic Parameters	181
Table 4.631 Selected Socio-Economic Parameters 2004-2009.....	181
Retail Sales	181
Table 4.632 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009.....	181
Table 4.633 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009.....	181
Table 4.634 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009.....	181
Number of Retail Outlets	181
Table 4.635 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009.....	181
Table 4.636 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009.....	181
Table 4.637 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009.....	182
Grocery Retailer Sales	182
Table 4.638 Retail Sales through Grocery Retailers by Type 2004-2009.....	182
Table 4.639 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009.....	182
Table 4.640 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009.....	182
Non-Grocery Retailer Sales	182
Table 4.641 Retail Sales through Non-Grocery Retailers by Type 2004-2009.....	182
Table 4.642 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009.....	182
Table 4.643 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009.....	183
Table 4.644 Retail Sales through Mixed Retailers by Type 2004-2009.....	183
Table 4.645 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009.....	183
Table 4.646 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009.....	183
Table 4.647 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009.....	183
Table 4.648 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009.....	183
Non-Store Retailing Sales	184
Table 4.649 Retail Sales through Non-Store Retailing by Type 2004-2009.....	184
Table 4.650 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009.....	184
Table 4.651 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009.....	184
Philippines	185
Socio-Economic Parameters	185
Table 4.652 Selected Socio-Economic Parameters 2004-2009.....	185
Retail Sales	185
Table 4.653 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009.....	185
Table 4.654 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009.....	185
Table 4.655 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009.....	185
Number of Retail Outlets	185
Table 4.656 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009.....	185
Table 4.657 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009.....	185
Table 4.658 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009.....	186
Grocery Retailer Sales	186
Table 4.659 Retail Sales through Grocery Retailers by Type 2004-2009.....	186
Table 4.660 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009.....	186
Table 4.661 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009.....	186
Non-Grocery Retailer Sales	186
Table 4.662 Retail Sales through Non-Grocery Retailers by Type 2004-2009.....	186
Table 4.663 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009.....	186
Table 4.664 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009.....	187
Table 4.665 Retail Sales through Mixed Retailers by Type 2004-2009.....	187
Table 4.666 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009.....	187
Table 4.667 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009.....	187
Table 4.668 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009.....	187
Table 4.669 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009.....	187
Non-Store Retailing Sales	188
Table 4.670 Retail Sales through Non-Store Retailing by Type 2004-2009.....	188
Table 4.671 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009.....	188
Table 4.672 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009.....	188
Poland	189
Socio-Economic Parameters	189
Table 4.673 Selected Socio-Economic Parameters 2004-2009.....	189
Retail Sales	189
Table 4.674 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009.....	189
Table 4.675 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009.....	189
Table 4.676 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009.....	189
Number of Retail Outlets	189
Table 4.677 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009.....	189
Table 4.678 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009.....	189
Table 4.679 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009.....	190
Grocery Retailer Sales	190
Table 4.680 Retail Sales through Grocery Retailers by Type 2004-2009.....	190
Table 4.681 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009.....	190
Table 4.682 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009.....	190

Non-Grocery Retailer Sales	190
Table 4.683 Retail Sales through Non-Grocery Retailers by Type 2004-2009.....	190
Table 4.684 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009.....	190
Table 4.685 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009.....	191
Table 4.686 Retail Sales through Mixed Retailers by Type 2004-2009.....	191
Table 4.687 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009.....	191
Table 4.688 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009.....	191
Table 4.689 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009.....	191
Table 4.690 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009.....	191
Non-Store Retailing Sales	192
Table 4.691 Retail Sales through Non-Store Retailing by Type 2004-2009.....	192
Table 4.692 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009.....	192
Table 4.693 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009.....	192
Portugal	193
Socio-Economic Parameters	193
Table 4.694 Selected Socio-Economic Parameters 2004-2009.....	193
Retail Sales	193
Table 4.695 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009.....	193
Table 4.696 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009.....	193
Table 4.697 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009.....	193
Number of Retail Outlets	193
Table 4.698 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009.....	193
Table 4.699 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009.....	193
Table 4.700 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009.....	194
Grocery Retailer Sales	194
Table 4.701 Retail Sales through Grocery Retailers by Type 2004-2009.....	194
Table 4.702 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009.....	194
Table 4.703 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009.....	194
Non-Grocery Retailer Sales	194
Table 4.704 Retail Sales through Non-Grocery Retailers by Type 2004-2009.....	194
Table 4.705 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009.....	194
Table 4.706 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009.....	195
Table 4.707 Retail Sales through Mixed Retailers by Type 2004-2009.....	195
Table 4.708 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009.....	195
Table 4.709 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009.....	195
Table 4.710 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009.....	195
Table 4.711 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009.....	195
Non-Store Retailing Sales	196
Table 4.712 Retail Sales through Non-Store Retailing by Type 2004-2009.....	196
Table 4.713 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009.....	196
Table 4.714 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009.....	196
Romania	197
Socio-Economic Parameters	197
Table 4.715 Selected Socio-Economic Parameters 2004-2009.....	197
Retail Sales	197
Table 4.716 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009.....	197
Table 4.717 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009.....	197
Table 4.718 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009.....	197
Number of Retail Outlets	197
Table 4.719 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009.....	197
Table 4.720 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009.....	197
Table 4.721 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009.....	198
Grocery Retailer Sales	198
Table 4.722 Retail Sales through Grocery Retailers by Type 2004-2009.....	198
Table 4.723 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009.....	198
Table 4.724 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009.....	198
Non-Grocery Retailer Sales	198
Table 4.725 Retail Sales through Non-Grocery Retailers by Type 2004-2009.....	198
Table 4.726 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009.....	198
Table 4.727 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009.....	199
Table 4.728 Retail Sales through Mixed Retailers by Type 2004-2009.....	199
Table 4.729 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009.....	199
Table 4.730 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009.....	199
Table 4.731 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009.....	199
Table 4.732 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009.....	199
Non-Store Retailing Sales	200
Table 4.733 Retail Sales through Non-Store Retailing by Type 2004-2009.....	200
Table 4.734 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009.....	200
Table 4.735 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009.....	200
Russia	201
Socio-Economic Parameters	201
Table 4.736 Selected Socio-Economic Parameters 2004-2009.....	201
Retail Sales	201
Table 4.737 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009.....	201
Table 4.738 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009.....	201
Table 4.739 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009.....	201
Number of Retail Outlets	201
Table 4.740 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009.....	201
Table 4.741 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009.....	201
Table 4.742 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009.....	202
Grocery Retailer Sales	202
Table 4.743 Retail Sales through Grocery Retailers by Type 2004-2009.....	202
Table 4.744 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009.....	202
Table 4.745 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009.....	202
Non-Grocery Retailer Sales	202
Table 4.746 Retail Sales through Non-Grocery Retailers by Type 2004-2009.....	202
Table 4.747 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009.....	202
Table 4.748 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009.....	203
Table 4.749 Retail Sales through Mixed Retailers by Type 2004-2009.....	203
Table 4.750 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009.....	203
Table 4.751 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009.....	203
Table 4.752 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009.....	203
Table 4.753 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009.....	203

Non-Store Retailing Sales	204
Table 4.754 Retail Sales through Non-Store Retailing by Type 2004-2009	204
Table 4.755 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	204
Table 4.756 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	204
Saudi Arabia	205
Socio-Economic Parameters	205
Table 4.757 Selected Socio-Economic Parameters 2004-2009	205
Retail Sales	205
Table 4.758 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	205
Table 4.759 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	205
Table 4.760 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	205
Number of Retail Outlets	205
Table 4.761 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	205
Table 4.762 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	205
Table 4.763 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	206
Grocery Retailer Sales	206
Table 4.764 Retail Sales through Grocery Retailers by Type 2004-2009	206
Table 4.765 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	206
Table 4.766 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	206
Non-Grocery Retailer Sales	206
Table 4.767 Retail Sales through Non-Grocery Retailers by Type 2004-2009	206
Table 4.768 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	206
Table 4.769 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	207
Table 4.770 Retail Sales through Mixed Retailers by Type 2004-2009	207
Table 4.771 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	207
Table 4.772 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	207
Table 4.773 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	207
Table 4.774 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	207
Non-Store Retailing Sales	208
Table 4.775 Retail Sales through Non-Store Retailing by Type 2004-2009	208
Table 4.776 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	208
Table 4.777 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	208
Singapore	209
Socio-Economic Parameters	209
Table 4.778 Selected Socio-Economic Parameters 2004-2009	209
Retail Sales	209
Table 4.779 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	209
Table 4.780 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	209
Table 4.781 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	209
Number of Retail Outlets	209
Table 4.782 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	209
Table 4.783 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	209
Table 4.784 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	210
Grocery Retailer Sales	210
Table 4.785 Retail Sales through Grocery Retailers by Type 2004-2009	210
Table 4.786 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	210
Table 4.787 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	210
Non-Grocery Retailer Sales	210
Table 4.788 Retail Sales through Non-Grocery Retailers by Type 2004-2009	210
Table 4.789 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	210
Table 4.790 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	211
Table 4.791 Retail Sales through Mixed Retailers by Type 2004-2009	211
Table 4.792 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	211
Table 4.793 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	211
Table 4.794 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	211
Table 4.795 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	211
Non-Store Retailing Sales	212
Table 4.796 Retail Sales through Non-Store Retailing by Type 2004-2009	212
Table 4.797 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	212
Table 4.798 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	212
Slovakia	213
Socio-Economic Parameters	213
Table 4.799 Selected Socio-Economic Parameters 2004-2009	213
Retail Sales	213
Table 4.800 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	213
Table 4.801 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	213
Table 4.802 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	213
Number of Retail Outlets	213
Table 4.803 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	213
Table 4.804 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	213
Table 4.805 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	214
Grocery Retailer Sales	214
Table 4.806 Retail Sales through Grocery Retailers by Type 2004-2009	214
Table 4.807 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	214
Table 4.808 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	214
Non-Grocery Retailer Sales	214
Table 4.809 Retail Sales through Non-Grocery Retailers by Type 2004-2009	214
Table 4.810 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	214
Table 4.811 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	215
Table 4.812 Retail Sales through Mixed Retailers by Type 2004-2009	215
Table 4.813 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	215
Table 4.814 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	215
Table 4.815 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	215
Table 4.816 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	215
Non-Store Retailing Sales	216
Table 4.817 Retail Sales through Non-Store Retailing by Type 2004-2009	216
Table 4.818 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	216
Table 4.819 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	216
South Africa	217
Socio-Economic Parameters	217
Table 4.820 Selected Socio-Economic Parameters 2004-2009	217

Retail Sales	217
Table 4.821 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	217
Table 4.822 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	217
Table 4.823 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	217
Number of Retail Outlets	217
Table 4.824 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	217
Table 4.825 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	217
Table 4.826 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	218
Grocery Retailer Sales	218
Table 4.827 Retail Sales through Grocery Retailers by Type 2004-2009	218
Table 4.828 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	218
Table 4.829 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	218
Non-Grocery Retailer Sales	218
Table 4.830 Retail Sales through Non-Grocery Retailers by Type 2004-2009	218
Table 4.831 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	218
Table 4.832 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	219
Table 4.833 Retail Sales through Mixed Retailers by Type 2004-2009	219
Table 4.834 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	219
Table 4.835 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	219
Table 4.836 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	219
Table 4.837 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	219
Non-Store Retailing Sales	220
Table 4.838 Retail Sales through Non-Store Retailing by Type 2004-2009	220
Table 4.839 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	220
Table 4.840 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	220
South Korea	221
Socio-Economic Parameters	221
Table 4.841 Selected Socio-Economic Parameters 2004-2009	221
Retail Sales	221
Table 4.842 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	221
Table 4.843 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	221
Table 4.844 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	221
Number of Retail Outlets	221
Table 4.845 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	221
Table 4.846 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	221
Table 4.847 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	222
Grocery Retailer Sales	222
Table 4.848 Retail Sales through Grocery Retailers by Type 2004-2009	222
Table 4.849 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	222
Table 4.850 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	222
Non-Grocery Retailer Sales	222
Table 4.851 Retail Sales through Non-Grocery Retailers by Type 2004-2009	222
Table 4.852 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	222
Table 4.853 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	223
Table 4.854 Retail Sales through Mixed Retailers by Type 2004-2009	223
Table 4.855 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	223
Table 4.856 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	223
Table 4.857 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	223
Table 4.858 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	223
Non-Store Retailing Sales	224
Table 4.859 Retail Sales through Non-Store Retailing by Type 2004-2009	224
Table 4.860 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	224
Table 4.861 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	224
Spain	225
Socio-Economic Parameters	225
Table 4.862 Selected Socio-Economic Parameters 2004-2009	225
Retail Sales	225
Table 4.863 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	225
Table 4.864 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	225
Table 4.865 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	225
Number of Retail Outlets	225
Table 4.866 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	225
Table 4.867 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	225
Table 4.868 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	226
Grocery Retailer Sales	226
Table 4.869 Retail Sales through Grocery Retailers by Type 2004-2009	226
Table 4.870 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	226
Table 4.871 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	226
Non-Grocery Retailer Sales	226
Table 4.872 Retail Sales through Non-Grocery Retailers by Type 2004-2009	226
Table 4.873 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	226
Table 4.874 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	227
Table 4.875 Retail Sales through Mixed Retailers by Type 2004-2009	227
Table 4.876 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	227
Table 4.877 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	227
Table 4.878 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	227
Table 4.879 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	227
Non-Store Retailing Sales	228
Table 4.880 Retail Sales through Non-Store Retailing by Type 2004-2009	228
Table 4.881 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	228
Table 4.882 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	228
Sweden	229
Socio-Economic Parameters	229
Table 4.883 Selected Socio-Economic Parameters 2004-2009	229
Retail Sales	229
Table 4.884 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	229
Table 4.885 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	229
Table 4.886 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	229
Number of Retail Outlets	229
Table 4.887 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	229
Table 4.888 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	229
Table 4.889 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	230

Grocery Retailer Sales	230
Table 4.890 Retail Sales through Grocery Retailers by Type 2004-2009	230
Table 4.891 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	230
Table 4.892 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	230
Non-Grocery Retailer Sales	230
Table 4.893 Retail Sales through Non-Grocery Retailers by Type 2004-2009	230
Table 4.894 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	230
Table 4.895 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	231
Table 4.896 Retail Sales through Mixed Retailers by Type 2004-2009	231
Table 4.897 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	231
Table 4.898 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	231
Table 4.899 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	231
Table 4.900 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	231
Non-Store Retailing Sales	232
Table 4.901 Retail Sales through Non-Store Retailing by Type 2004-2009	232
Table 4.902 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	232
Table 4.903 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	232
Switzerland	233
Socio-Economic Parameters	233
Table 4.904 Selected Socio-Economic Parameters 2004-2009	233
Retail Sales	233
Table 4.905 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	233
Table 4.906 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	233
Table 4.907 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	233
Number of Retail Outlets	233
Table 4.908 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	233
Table 4.909 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	233
Table 4.910 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	234
Grocery Retailer Sales	234
Table 4.911 Retail Sales through Grocery Retailers by Type 2004-2009	234
Table 4.912 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	234
Table 4.913 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	234
Non-Grocery Retailer Sales	234
Table 4.914 Retail Sales through Non-Grocery Retailers by Type 2004-2009	234
Table 4.915 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	234
Table 4.916 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	235
Table 4.917 Retail Sales through Mixed Retailers by Type 2004-2009	235
Table 4.918 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	235
Table 4.919 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	235
Table 4.920 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	235
Table 4.921 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	235
Non-Store Retailing Sales	236
Table 4.922 Retail Sales through Non-Store Retailing by Type 2004-2009	236
Table 4.923 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	236
Table 4.924 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	236
Taiwan	237
Socio-Economic Parameters	237
Table 4.925 Selected Socio-Economic Parameters 2004-2009	237
Retail Sales	237
Table 4.926 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	237
Table 4.927 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	237
Table 4.928 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	237
Number of Retail Outlets	237
Table 4.929 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	237
Table 4.930 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	237
Table 4.931 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	238
Grocery Retailer Sales	238
Table 4.932 Retail Sales through Grocery Retailers by Type 2004-2009	238
Table 4.933 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	238
Table 4.934 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	238
Non-Grocery Retailer Sales	238
Table 4.935 Retail Sales through Non-Grocery Retailers by Type 2004-2009	238
Table 4.936 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	238
Table 4.937 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	239
Table 4.938 Retail Sales through Mixed Retailers by Type 2004-2009	239
Table 4.939 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	239
Table 4.940 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	239
Table 4.941 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	239
Table 4.942 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	239
Non-Store Retailing Sales	240
Table 4.943 Retail Sales through Non-Store Retailing by Type 2004-2009	240
Table 4.944 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	240
Table 4.945 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	240
Thailand	241
Socio-Economic Parameters	241
Table 4.946 Selected Socio-Economic Parameters 2004-2009	241
Retail Sales	241
Table 4.947 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	241
Table 4.948 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	241
Table 4.949 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	241
Number of Retail Outlets	241
Table 4.950 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	241
Table 4.951 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	241
Table 4.952 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	242
Grocery Retailer Sales	242
Table 4.953 Retail Sales through Grocery Retailers by Type 2004-2009	242
Table 4.954 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	242
Table 4.955 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	242
Non-Grocery Retailer Sales	242
Table 4.956 Retail Sales through Non-Grocery Retailers by Type 2004-2009	242
Table 4.957 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	242
Table 4.958 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	243
Table 4.959 Retail Sales through Mixed Retailers by Type 2004-2009	243

Table 4.960 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	243
Table 4.961 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	243
Table 4.962 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	243
Table 4.963 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	243
Non-Store Retailing Sales	244
Table 4.964 Retail Sales through Non-Store Retailing by Type 2004-2009	244
Table 4.965 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	244
Table 4.966 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	244
Turkey	245
Socio-Economic Parameters	245
Table 4.967 Selected Socio-Economic Parameters 2004-2009	245
Retail Sales	245
Table 4.968 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	245
Table 4.969 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	245
Table 4.970 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	245
Number of Retail Outlets	245
Table 4.971 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	245
Table 4.972 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	245
Table 4.973 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	246
Grocery Retailer Sales	246
Table 4.974 Retail Sales through Grocery Retailers by Type 2004-2009	246
Table 4.975 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	246
Table 4.976 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	246
Non-Grocery Retailer Sales	246
Table 4.977 Retail Sales through Non-Grocery Retailers by Type 2004-2009	246
Table 4.978 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	246
Table 4.979 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	247
Table 4.980 Retail Sales through Mixed Retailers by Type 2004-2009	247
Table 4.981 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	247
Table 4.982 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	247
Table 4.983 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	247
Table 4.984 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	247
Non-Store Retailing Sales	248
Table 4.985 Retail Sales through Non-Store Retailing by Type 2004-2009	248
Table 4.986 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	248
Table 4.987 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	248
Ukraine	249
Socio-Economic Parameters	249
Table 4.988 Selected Socio-Economic Parameters 2004-2009	249
Retail Sales	249
Table 4.989 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	249
Table 4.990 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	249
Table 4.991 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	249
Number of Retail Outlets	249
Table 4.992 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	249
Table 4.993 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	249
Table 4.994 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	250
Grocery Retailer Sales	250
Table 4.995 Retail Sales through Grocery Retailers by Type 2004-2009	250
Table 4.996 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	250
Table 4.997 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	250
Non-Grocery Retailer Sales	250
Table 4.998 Retail Sales through Non-Grocery Retailers by Type 2004-2009	250
Table 4.999 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	250
Table 4.1000 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	251
Table 4.1001 Retail Sales through Mixed Retailers by Type 2004-2009	251
Table 4.1002 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	251
Table 4.1003 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	251
Table 4.1004 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	251
Table 4.1005 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	251
Non-Store Retailing Sales	252
Table 4.1006 Retail Sales through Non-Store Retailing by Type 2004-2009	252
Table 4.1007 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	252
Table 4.1008 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	252
United Kingdom	253
Socio-Economic Parameters	253
Table 4.1009 Selected Socio-Economic Parameters 2004-2009	253
Retail Sales	253
Table 4.1010 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	253
Table 4.1011 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	253
Table 4.1012 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	253
Number of Retail Outlets	253
Table 4.1013 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	253
Table 4.1014 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	253
Table 4.1015 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	254
Grocery Retailer Sales	254
Table 4.1016 Retail Sales through Grocery Retailers by Type 2004-2009	254
Table 4.1017 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	254
Table 4.1018 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	254
Non-Grocery Retailer Sales	254
Table 4.1019 Retail Sales through Non-Grocery Retailers by Type 2004-2009	254
Table 4.1020 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	254
Table 4.1021 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	255
Table 4.1022 Retail Sales through Mixed Retailers by Type 2004-2009	255
Table 4.1023 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	255
Table 4.1024 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	255
Table 4.1025 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	255
Table 4.1026 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	255
Non-Store Retailing Sales	256
Table 4.1027 Retail Sales through Non-Store Retailing by Type 2004-2009	256
Table 4.1028 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	256
Table 4.1029 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	256

USA	257
Socio-Economic Parameters	257
Table 4.1030 Selected Socio-Economic Parameters 2004-2009	257
Retail Sales	257
Table 4.1031 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	257
Table 4.1032 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	257
Table 4.1033 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	257
Number of Retail Outlets	257
Table 4.1034 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	257
Table 4.1035 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	257
Table 4.1036 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	258
Grocery Retailer Sales	258
Table 4.1037 Retail Sales through Grocery Retailers by Type 2004-2009	258
Table 4.1038 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	258
Table 4.1039 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	258
Non-Grocery Retailer Sales	258
Table 4.1040 Retail Sales through Non-Grocery Retailers by Type 2004-2009	258
Table 4.1041 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	258
Table 4.1042 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	259
Table 4.1043 Retail Sales through Mixed Retailers by Type 2004-2009	259
Table 4.1044 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	259
Table 4.1045 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	259
Table 4.1046 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	259
Table 4.1047 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	259
Non-Store Retailing Sales	260
Table 4.1048 Retail Sales through Non-Store Retailing by Type 2004-2009	260
Table 4.1049 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	260
Table 4.1050 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	260
Venezuela	261
Socio-Economic Parameters	261
Table 4.1051 Selected Socio-Economic Parameters 2004-2009	261
Retail Sales	261
Table 4.1052 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	261
Table 4.1053 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	261
Table 4.1054 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	261
Number of Retail Outlets	261
Table 4.1055 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	261
Table 4.1056 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	261
Table 4.1057 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	262
Grocery Retailer Sales	262
Table 4.1058 Retail Sales through Grocery Retailers by Type 2004-2009	262
Table 4.1059 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	262
Table 4.1060 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	262
Non-Grocery Retailer Sales	262
Table 4.1061 Retail Sales through Non-Grocery Retailers by Type 2004-2009	262
Table 4.1062 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	262
Table 4.1063 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	263
Table 4.1064 Retail Sales through Mixed Retailers by Type 2004-2009	263
Table 4.1065 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	263
Table 4.1066 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	263
Table 4.1067 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	263
Table 4.1068 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	263
Non-Store Retailing Sales	264
Table 4.1069 Retail Sales through Non-Store Retailing by Type 2004-2009	264
Table 4.1070 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	264
Table 4.1071 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	264
Vietnam	265
Socio-Economic Parameters	265
Table 4.1072 Selected Socio-Economic Parameters 2004-2009	265
Retail Sales	265
Table 4.1073 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split 2004-2009	265
Table 4.1074 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: % Analysis 2004-2009	265
Table 4.1075 Total Retail Sales by Grocery Retailer/Non-Grocery Retailer/Non-Store Retailing Split: Real Growth Index 2004-2009	265
Number of Retail Outlets	265
Table 4.1076 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split 2004-2009	265
Table 4.1077 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: % Analysis 2004-2009	265
Table 4.1078 Number of Retail Outlets by Grocery Retailer/Non-Grocery Retailer Split: Growth Index 2004-2009	266
Grocery Retailer Sales	266
Table 4.1079 Retail Sales through Grocery Retailers by Type 2004-2009	266
Table 4.1080 Retail Sales through Grocery Retailers by Type: % Analysis 2004-2009	266
Table 4.1081 Retail Sales through Grocery Retailers by Type: Real Growth Index 2004-2009	266
Non-Grocery Retailer Sales	266
Table 4.1082 Retail Sales through Non-Grocery Retailers by Type 2004-2009	266
Table 4.1083 Retail Sales through Non-Grocery Retailers by Type: % Analysis 2004-2009	266
Table 4.1084 Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009	267
Table 4.1085 Retail Sales through Mixed Retailers by Type 2004-2009	267
Table 4.1086 Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009	267
Table 4.1087 Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009	267
Table 4.1088 Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009	267
Table 4.1089 Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009	267
Non-Store Retailing Sales	268
Table 4.1090 Retail Sales through Non-Store Retailing by Type 2004-2009	268
Table 4.1091 Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009	268
Table 4.1092 Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009	268

Introduction

Scope of the Handbook

World Retail Data and Statistics is Euromonitor International's compendium of statistical information on retail trade throughout the world. Now in its sixth edition, it provides a wealth of up-to-date statistical retailing data complemented by pertinent socio-economic statistics across 52 countries worldwide.

The data are presented in spreadsheet form, both on an individual country-by-country basis and in comparative international tables which, combined with the benefit of standardised units, allow for easy identification of trends and developments. A unique series of rankings comparing the retail infrastructure across each country in relation to others completes a comprehensive resource on global retailing.

As well as looking at grocery retailers and non-grocery retailers, World Retail Data and Statistics also includes datasets on non-store retailing including vending, home shopping, internet retailing, and direct selling.

The data has been expertly researched by Euromonitor International's global network of retail analysts who have many years' experience producing in-depth market analysis reports on the retail sector.

As part of the comparative process, where data is in value form, units have been converted to an internationally comparable unit (the US dollar) and the exchange rates used for converting national currencies are given in the following table.

Section One: Socio-Economic Parameters

Within all the countries of the world, there are a significant number of socio-economic and demographic influences which affect both the structure of the retail industry and the performance of retailers. This section provides a summary of these basic facts and figures and includes population, GDP, labour force indicators, consumer expenditure, consumer prices and costs, and household characteristics.

Section Two: World Retailing Trends

This section contains extensive world retail statistical data and forms a comprehensive survey of world retail trends and developments. Data are presented in standardised units within 17 statistical tabulations, allowing easy identification of trends and quick comparisons across countries. Each table presents comparative retailing information, either in the form of time series data (2004-2009) or single year (2009) data. All the countries are listed down the left-hand column.

Section Three: World Retail Rankings

The standardisation of units allows the compilation of a series of unique rankings, showing the relative position for each country within the 52 country matrix measured by a selection of key retailing criteria. Per capita figures have been used to further enhance comparability.

Section Four: Country Snapshots

Using the same standardised approach followed in sections One and Two, this section deals with each of the 52 countries in turn, presenting socio-economic and retail data under a series of standard headings, thus allowing a review of the key facts and figures in the changing retail environments within each country.

Quality and availability of data varies considerably country by country, but where possible Euromonitor International has sought to overcome any shortfalls by providing estimates based upon knowledge of the market and the retail sector as well as upon government statistics and the retail press.

Glossary of Terms

In this book, Euromonitor International has sought to standardise the terms applied to different retail formats, organisations and outlets, in order to facilitate cross-country comparisons. Some of the terminology used in national government statistics is vague and imprecise, which may lead to some confusion in the comparison of national variations; care should therefore be taken in applying them.

Grocery retailing includes establishments primarily engaged in the sale of fresh, packaged and prepared foods and mainly non-alcoholic drinks for home preparation and consumption. In addition, many of these formats sell a variety of non-food grocery items, health and beauty products and general merchandise. Some may offer in-store bakeries, delicatessens and extensive selections of prepared take-away food.

Grocery retailing includes independently operated and owned establishments (often associated with voluntary or co-operative wholesaling groups or with umbrella-type organisations such as franchisers) and establishments which are owned and operated by a corporate parent organisation. The industry includes hypermarkets, supermarkets, discounters, independent grocers, c-stores, free-standing food specialists such as butchers, speciality retailers and other miscellaneous retail outlets primarily engaged in selling food.

Non-grocery retailing encompasses all those establishments primarily engaged in selling non-grocery consumer goods. The industry includes mixed retailers, health and beauty retailers, clothing and footwear retailers, furniture and household goods retailers, durable goods retailers, leisure and personal goods retailers, and other non-grocery retailers.

Non-store retailing refers to the sale of consumer goods from locations other than retail outlets or market stalls. The industry includes vending, home shopping, internet retailing, and direct selling.

For the purposes of this book, Euromonitor International has, wherever possible, excluded sales of motor cars and fuel from its definition of retail sales and excludes sales made through hotels, restaurants and catering outlets. Retail sales within each country sector are clearly defined as separate from wholesaling, except where wholesalers may be selling directly to the public, and therefore retail sales do include direct sales and street trade unless otherwise specified. In some countries the distinctions between retailing, wholesaling and catering are not always clear. Every effort has been made to separate all the different sectors and apply clear definitions within each country sector.

The main terms used by Euromonitor International in its retailing publications are listed as follows:

Retail sales

Sales of food and non-food products through retail outlets and non-store channels.

Grocery retailers

Grocery retail outlets selling primarily food and non-food products.

Supermarkets

A store with a selling area of between 400 and 2,500 square metres, selling at least 70% foodstuffs and everyday commodities. However, smaller (under 100 sq m) and larger (2,500 sq m) supermarket stores which are common in some of the countries under review ie: Spain, Latin American and Asian countries are included.

Hypermarkets

A store with a retail sales area of over 2,500 square metres, with at least 35% of selling space devoted to non-foods. Frequently on out-of-town sites or as the anchor store in a shopping centre.

Discounters

Hard discounter: first introduced by Aldi in Germany, and also known as limited-line discounters. Stores are typically 300-900 square metres and stock less than 1,000 product lines, largely in packaged groceries. Goods are mainly own-label or budget brands. Soft discounter: slightly larger than hard discounters, and also known as extended-range discounters. Stores typically stock 1,500-4,000 product lines. As well as own-label and budget brands, stores commonly carry leading brands at discounted prices.

Convenience stores

Shop selling a wide range of goods with extended opening hours and fitting the following characteristics: opening seven days a week; opening 9am or earlier on six or more days a week; closing 8pm or later on six or more days of the week; and closing at lunch-time for no more than one day a week. C-stores handle two or more of the following product categories: pre-recorded videos (for sale or rent), take-away food (ready-made sandwiches, rolls or hot food), newspapers or magazines, cut flowers or pot plants and greetings cards.

Independent grocers

A retailer owning and operating one or more (but fewer than ten) retail outlets, but not affiliated to any other business; mainly family business or partnership, where food accounts for at least 50% of total retail sales.

Food/drink/tobacco specialists

Retail outlets specialising in the sale of mainly one category of food; drinks stores; tobacconists. Includes bakers (bread and flour confectionery), butchers (meat and meat products), fishmongers (fish and seafood), greengrocers (fruit and vegetables), drinks stores (alcoholic and non-alcoholic drinks), tobacconists (tobacco products and smokers' accessories), cheesemongers, chocolatiers and other single food categories.

Forecourt retailers

Grocery retail outlets selling a wide range of groceries from a gas station forecourt and fitting several of the following characteristics: ò Extended opening hours ò Selling area of less than 400 sq metres ò Handling two or more of the following product categories: audio-visual goods (for sale or rent), take-away food (ready made sandwiches, rolls or hot food), newspapers or magazines, cut flowers or pot plants, greetings cards, automotive accessories.

Other grocery retailers

Other retailers selling predominantly food, beverages or a combination these. Includes kiosks; markets selling predominantly groceries; food and drink souvenir stores; regional speciality stores; healthfood stores selling primarily food or beverages (rather than predominantly vitamins and dietary supplements); organic food and drink stores; delicatessens; and direct home delivery, eg of milk; meat from farm/dairy is excluded.

Non-grocery retailers

Non-grocery retail outlets selling non-food products.

Department stores

A store with a sales area of at least 2,500 sq m, selling mainly non-food merchandise and at least five lines in different departments. They are usually arranged over several floors.

Variety stores

Usually located on one floor, offering a wide assortment of extensively discounted fast-moving consumer goods on a self-service basis. Normally at least 1,500 square metres in size, and giving priority to fast-moving non-food and textile goods that have long shelf-lives. Primarily large chained retail operations such as Wal-Mart, Kmart and Target (in the US, Canada, and Mexico).

Clothing and footwear retailers

Retailers specialized in the distribution of all types of clothing and footwear including accessories. This includes those stores that carry a combination of all products for either men or women or children and those that may specialize by either gender, age or product. This excludes sports good outlets

Health and beauty retailers

Pharmacies also known as chemists: outlet selling OTC and prescription-only medicines, in addition to parapharmacy goods, cosmetics and toiletries and some household products. Outlet has to have a qualified pharmacist in attendance. Parapharmacies also known as drugstores: non-dispensing outlet mainly selling toiletries, parapharmacy, and OTC healthcare products. Drugstores in Spain (Droguerías) also sell household cleaning agents, paint, DIY products and sometimes pet products and services such as photo processing. Perfumeries: retail outlets specializing in the sale of fragrances, other cosmetics and toiletries or a combination of these.

Furniture and household goods retailers

Furniture and furnishings stores: retailers whose main activity is the distribution of furniture or home furnishings or a combination of these. DIY and hardware stores: retail outlets specializing in the sale of DIY, hardware, gardening equipment or a combination of these. DIY outlets are those specializing in the sale of products for the purpose of home maintenance, improvement, modernisation and repair construction. Included are: DIY superstores (usually out-of-town warehouse style outlets); DIY sheds; specialist DIY independents and chains, and franchise operations (eg Homebase, OBI, BauMax, Leroy Merlin, Praktiker, Castorama etc). Hardware retailers are often commonly referred to as Ironmongers. They are independent outlets or chains selling hardware (metal tools and household articles) and DIY goods. They tend to be high street-based. Garden centre: out-of-town outlet selling garden products, plants and equipment.

Durable goods retailers

Retail outlets specializing in the sale of large or small domestic electrical appliances, consumer electronic equipment, computers or a combination of these.

Leisure and personal goods retailers

Booksellers: retailers specializing in the distribution of books, journals, magazines and stationery or a combination of these. Audio-visual stores: retailers whose main activity is the distribution of recorded music, videos, video games (including hardware) or a combination of these. Toys and games outlets: retailers specialized in the distribution of toys. Sports goods outlets: retailers specializing in sports apparel and equipment distribution.

Other non-grocery retailers

Other non-grocery specialist outlets, second-hand outlets, non-grocery markets and street hawkers. Includes kiosks and markets selling primarily non-grocery items. Includes specialist repair stores, ie of clothing, footwear, watches, clocks, jewellery, bicycles etc. Includes Confectioners, Tobacconists and Newsagents (CTNs).

Non-store retailing

Retailers that sell consumer goods from locations other than retail outlets or market stalls.

Vending

Vending means automatic retailing. It covers the sale of products and services at an unattended point of sale through a machine operated by introducing coins, bank notes, payment cards, tokens or other means of cashless payment. This book focuses on vended products only, ie food, drink and other consumable goods such as vended tobacco, sanitary products and condoms. Services such as the public telephone, laundrette facilities, stamps, travel tickets, passport photographs, domestic energy supplies and business card creation are excluded. Coverage includes vending systems installed in public and semi-captive environments only. Hotels, transport networks, recreational centres, shopping centres/malls are included. Factories, offices, schools, hospitals, prisons and other captive environments are excluded.

Home shopping

Retailers selling consumer goods via mail order catalogues, TV shopping and direct mail. Consumers purchase goods indirect response to an advertisement or promotion through a mail item, printed catalogue, TV shopping programme, or internet catalogue whereby the order is placed and payment is made by phone, by post or through other media such as digital TV. Excludes sales on returned products/ unpaid invoices. Excludes internet retailing.

Internet retailing

Retailers selling consumer goods via the internet. Consumers purchase goods advertised or promoted through a web-medium whereby the payment is made online through the web platform. Also includes orders placed the web for which payment is then made through a store card or an online credit account subsequent to delivery. This payment may be by any mode of payment including postal cheque, direct debit, standing order, or other banking tools. Excludes sales on returned products/unpaid invoices.

Direct selling

Direct selling is the marketing of consumer goods directly to consumers, generally in their homes or the homes of others, at their workplace and other places away from permanent retail locations. Direct selling occurs in two primary ways: one-to-one basis (usually by prior arrangement, a demonstration is given by a direct seller to a customer) or party-plan basis (selling through explanation and demonstration of products to a group of prospective customers by a direct seller usually in the home of host(ess) who invites other persons for this purpose). Avon is a prime example of a one-to-one method. Tupperware is famous for its party-plan method. There are many ways of organising a direct selling company. The traditional organisation is single level compensation, where agents buy their merchandise direct from the manufacturer at a discounted price and then sell on to the consumer at as near a price to the recommended retail price as they can. Examples include Avon and Tupperware. Some companies use a network or multilevel marketing structure, where goods and services are supplied to consumers for final consumption through sales made by a network of independent direct sellers. These direct sellers may receive remuneration based on their own sales of goods and services to consumers, and from the sales to consumers generated by their network of other independent direct sellers who have been recruited and trained in the business. Examples include Amway (Alticor), Herbalife. Direct selling is commonly used by consumers in rural areas and small towns, making available goods and services not provided through outlets in the area. For the purposes of this book, direct selling of services, such as insurance, telecoms, other utilities, financial services, are excluded.

Sources and Methodology

World Retail Data and Statistics has been compiled following an extensive research programme completed during 2009. The retail distribution industry is well documented in government statistics, by trade associations and numerous other organisations involved in research, development and regulation in the retail distributive trades. Extensive use has been made of these sources in compiling the data for this report with the emphasis on using national sources only. These include:

- National statistical offices
- Trade associations concerned with the retail trade
- Banks and government departments publishing national economic data and information on trends and developments
- Leading retail organisations for financial data and information on sector specific trends and developments
- Major retailers for company specific financial performance data
- Retail trade journals, newspapers and other trade sources

In addition to collecting this data, Euromonitor International has made use of its own extensive retail and market information database as well as a wide range of its own reports published in recent years.

In preparing data for each section, Euromonitor International has made every attempt to use standard terms as defined in the glossary above. Care should be taken when applying these terms however as some definitions may vary from one country to another.

Disclaimer

The compilation of a reference volume of this type involves extracting complex statistical data from numerous sources in different languages. The editors have made every attempt to ensure accuracy but the publishers cannot be held responsible for any errors which may have occurred.

Non-Store Retailer Sales

Trends in Retail Sales through Non-Store Retailers 2004-2009

Table 2.15

US\$ billion

	2004	2005	2006	2007	2008	2009
Argentina	1.75	2.04	2.41	3.06	3.98	4.17
Australia	3.16	3.56	3.81	4.56	4.90	4.08
Austria	2.08	2.13	2.17	2.43	2.68	2.44
Belgium	1.34	1.38	1.65	2.06	2.47	2.33
Brazil	4.22	6.06	8.34	11.19	14.39	13.75
Bulgaria	0.06	0.08	0.08	0.11	0.13	0.11
Canada	4.38	4.83	5.25	5.64	5.69	4.67
Chile	0.54	0.69	0.80	0.96	1.14	1.01
China	5.66	5.94	6.15	7.32	9.03	10.17
Colombia	0.70	0.85	0.95	1.16	1.47	1.23
Czech Republic	0.63	0.80	0.98	1.30	1.78	1.56
Denmark	0.81	0.99	1.23	1.65	2.01	1.99
Egypt	0.11	0.13	0.13	0.14	0.15	0.16
Finland	1.57	1.71	1.74	2.06	2.39	2.22
France	13.51	14.52	15.84	19.70	23.30	22.87
Germany	29.99	32.22	34.49	38.70	43.01	39.34
Greece	0.56	0.65	0.77	0.98	1.19	1.17
Hong Kong, China	0.33	0.34	0.36	0.37	0.38	0.39
Hungary	0.56	0.61	0.62	0.80	0.96	0.82
India	0.60	0.73	0.87	1.21	1.48	1.60
Indonesia	0.49	0.53	0.62	0.69	0.73	0.65
Ireland	0.69	0.72	0.77	0.90	0.99	0.89
Israel	0.39	0.43	0.45	0.52	0.64	0.59
Italy	6.42	6.77	7.42	8.73	10.13	9.75
Japan	89.86	91.60	90.16	91.00	96.95	109.60
Malaysia	1.72	1.96	2.30	2.75	3.08	2.92
Mexico	4.56	5.16	5.74	6.55	7.08	5.71
Morocco	0.06	0.07	0.08	0.10	0.12	0.11
Netherlands	2.92	3.06	3.46	4.29	5.14	5.05
New Zealand	0.60	0.68	0.66	0.78	0.77	0.60
Norway	1.14	1.31	1.41	1.66	1.81	1.53
Philippines	0.54	0.58	0.67	0.79	0.86	0.85
Poland	0.90	1.15	1.47	2.25	3.11	2.29
Portugal	0.91	0.94	1.03	1.24	1.45	1.35
Romania	0.25	0.38	0.48	0.70	0.84	0.61
Russia	3.60	5.01	6.62	9.35	11.85	7.25
Saudi Arabia	0.18	0.20	0.23	0.26	0.30	0.33
Singapore	0.46	0.54	0.65	0.77	0.90	0.87
Slovakia	0.21	0.23	0.26	0.35	0.41	0.37
South Africa	1.57	1.76	1.83	1.97	1.82	1.59
South Korea	17.20	20.88	24.27	26.65	23.93	19.86
Spain	4.41	4.83	5.24	6.35	7.42	6.87
Sweden	1.78	1.93	2.15	2.54	2.74	2.23
Switzerland	3.02	3.03	3.06	3.28	3.79	3.57
Taiwan	4.01	4.42	4.42	4.58	4.92	4.60
Thailand	0.83	0.90	1.10	1.33	1.49	1.50
Turkey	1.37	1.70	2.03	3.04	3.46	3.02
Ukraine	0.26	0.42	0.65	0.92	1.32	0.93
United Kingdom	26.92	30.90	35.05	43.78	44.56	38.38
USA	194.67	212.07	230.33	245.11	247.33	239.14
Venezuela	0.68	0.77	0.89	1.16	1.61	2.26
Vietnam	0.02	0.02	0.02	0.03	0.03	0.04

Source: Euromonitor International from trade sources

Retail Sales through Non-Grocery Retailers by Type: Real Growth Index 2004-2009

Table 4.580

2000 = 100

	2004	2005	2006	2007	2008	2009
Mixed Retailers	83.3	85.1	89.7	95.5	101.3	98.3
Health and Beauty Specialist Retailers	102.5	104.0	103.7	105.4	105.7	104.0
Clothing and Footwear Specialist Retailers	100.3	102.3	103.5	105.2	106.0	100.0
Home and Garden Specialist Retailers	101.0	101.5	101.3	102.7	103.0	97.6
Electronics and Appliance Specialist Retailers	101.1	101.7	101.6	103.4	104.7	96.5
Leisure and Personal Goods Specialist Retailers	106.6	107.9	107.5	108.1	108.6	106.7
Other Non-Grocery Retailers	108.5	111.1	113.0	114.6	114.7	110.4
Total	102.2	103.6	103.8	105.4	106.1	102.3

Source: Euromonitor International from trade sources

Retail Sales through Mixed Retailers by Type 2004-2009

Table 4.581

Dh million

	2004	2005	2006	2007	2008	2009
Department Stores	1,923.6	1,983.8	2,160.0	2,347.8	2,588.2	2,581.9
Variety Stores	73.7	77.9	83.3	89.0	94.9	100.1
Mass Merchandisers						
Warehouse Clubs						
Total	1,997.3	2,061.7	2,243.3	2,436.8	2,683.1	2,681.9

Source: Euromonitor International from trade sources

Retail Sales through Mixed Retailers by Type: % Analysis and Real Growth 2004-2009

Table 4.582

% of total / as stated

	2004	2009	% real growth 2004-2009
Department Stores	96.31	96.27	17.97
Variety Stores	3.69	3.73	19.35
Mass Merchandisers			
Warehouse Clubs			
Total	100.00	100.00	18.02

Source: Euromonitor International from trade sources

Retail Sales through Health and Beauty Retailers by Type: % Analysis and Real Growth 2004-2009

Table 4.583

% of total / as stated

	2004	2009	% real growth 2004-2009
Chemists/Pharmacies	87.12	85.82	-0.08
Parapharmacies/Drugstores	2.89	2.87	0.69
Beauty Specialist Retailers	6.35	7.33	17.16
Other Healthcare Specialist Retailers	3.64	3.97	10.89
Total	100.00	100.00	1.44

Source: Euromonitor International from trade sources

Retail Sales through Home Furniture and Household Goods Retailers by Type: % Analysis and Real Growth 2004-2009

Table 4.584

% of total / as stated

	2004	2009	% real growth 2004-2009
Furniture and Furnishings Stores	32.87	32.79	-3.60
DIY, Home Improvement and Garden Centres	67.13	67.21	-3.24
Total	100.00	100.00	-3.36

Source: Euromonitor International from trade sources

Retail Sales through Leisure and Personal Goods Retailers by Type: % Analysis and Real Growth 2004-2009

Table 4.585

% of total / as stated

	2004	2009	% real growth 2004-2009
Booksellers and Stationers	4.43	4.15	-6.16
Audio-Visual Stores	5.97	6.77	13.43
Toys and Games Stores	1.44	1.64	14.20
Sports Goods Stores	1.52	1.71	12.40
Pet Shops and Superstores	0.07	0.11	58.18
Other Leisure and Personal Goods Specialist Retailers	86.57	85.63	-0.99
Total	100.00	100.00	0.10

Source: Euromonitor International from trade sources

Non-Store Retailing Sales

Retail Sales through Non-Store Retailing by Type 2004-2009

Table 4.586

Dh million

	2004	2005	2006	2007	2008	2009
Vending	23.2	26.5	30.2	34.2	38.7	40.1
Homeshopping						
Internet Retailing	382.5	447.6	525.3	630.8	754.3	707.4
Direct Selling	119.1	125.0	139.0	155.2	170.1	157.3
Total	524.8	599.1	694.5	820.2	963.1	904.9

Source: Euromonitor International from trade sources

Retail Sales through Non-Store Retailing by Type: % Analysis 2004-2009

Table 4.587

% of total

	2004	2005	2006	2007	2008	2009
Vending	4.41	4.43	4.35	4.17	4.01	4.44
Homeshopping						
Internet Retailing	72.89	74.70	75.63	76.91	78.32	78.18
Direct Selling	22.70	20.87	20.02	18.92	17.66	17.39
Total	100.00	100.00	100.00	100.00	100.00	100.00

Source: Euromonitor International from trade sources

Retail Sales through Non-Store Retailing by Type: Growth Index 2004-2009

Table 4.588

2000 = 100

	2004	2005	2006	2007	2008	2009
Vending	161.0	182.6	201.1	223.1	243.3	245.3
Homeshopping						
Internet Retailing	166.7	193.2	219.5	258.4	297.6	271.0
Direct Selling	146.1	151.8	163.5	178.8	188.8	169.6
Total	161.3	182.3	204.7	236.8	268.0	244.4

Source: Euromonitor International from trade sources