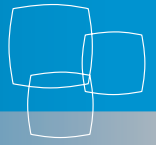




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# CANADA'S CHANGING RETAIL MARKET

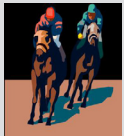


## Key facts from Industry Canada's Consumer Trends Update



### IMPORTANT ROLE IN THE ECONOMY

\$457.4 billion in sales and 12% of Canada's workforce in 2011.



### CANADA-U.S. SALES NECK-AND-NECK

In 2011, per capita retail sales in Canada were about \$13,000, matching U.S. levels for the first time.



### LESS SPACE, MORE SALES

Canadian malls average about \$600 in sales per square foot annually compared to about \$400 in the U.S.



### MORE FOREIGN-OWNED RETAILERS

Half of the top retail companies in Canada were foreign owned and totalled about 40% of retail sales\* in 2011.



### CONCENTRATION AT THE TOP

The top 30 retail companies ring up about two-thirds of all retail sales\* in Canada, about \$196 billion.



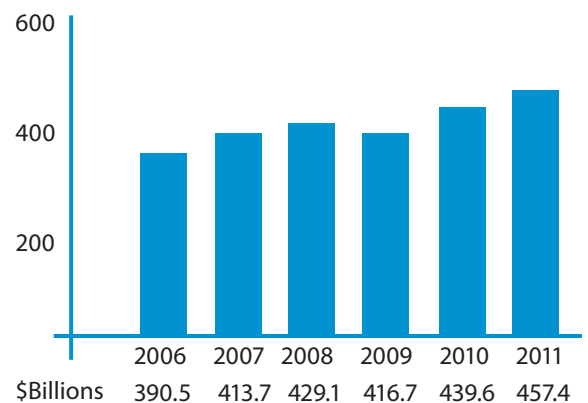
### THE BIG THREE

Weston Group (Loblaw), Wal-Mart, and Empire Co. (Sobey's) rung up 23.9% of retail sales\* in 2011.

### ONTARIO TOPS IN BIG BOX CENTRES



### ANNUAL RETAIL SALES IN CANADA



\*Non-automotive

Read the Consumer Trends Update on *Canada's Changing Retail Market* at: [www.ic.gc.ca/consumertrends](http://www.ic.gc.ca/consumertrends)

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