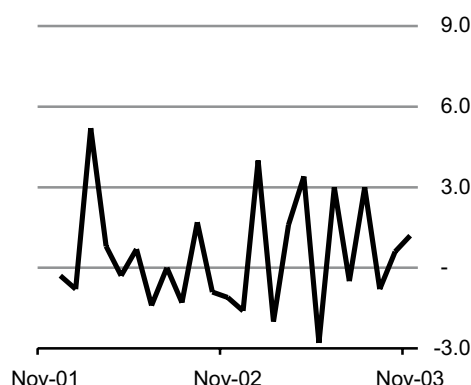




**Retail Sales Index -  
Seasonally Adjusted Volume  
Annual % Change**



## Retail Sales Index

November 2003 (First Estimates)

October 2003 (Final Figures)

### Retail Sales Index – All Businesses

(Base year 2000 = 100)

	Volume Index	Value Index
<b>November 2002</b>	102.2	107.2
<b>November 2003</b>	103.4	110.3
<b>% change</b>	+1.2%	+2.9%

### Index Updating and Rebasing

Commencing with November 2003 an updated Retail Sales Index (RSI) is being introduced using;

- New base year 2000 as 100
- Updated turnover weights from the 2000 Annual Services Inquiry
- Updated deflator weights
- Updated trading day weights

In addition the layout of the release has changed, expanding to 8 pages from the previous 4. The new tables introduced are, All Businesses Excl. Motor Trades (Table 2), a breakdown by Business Group for the provisional month (Table 3). The Combined Groups have been added to tables 3, 4 and 5. A European Retail Sales table showing annual percentage change in volume is also included. An updated back series of data from January 2001 to October 2003 is available on the CSO website.

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### Retail Sales volume up 1.2%

The volume of retail sales (i.e. excluding price effects) increased by 1.2% in November 2003 compared to November 2002. There was a monthly increase of 0.2%. If Motor Trades are excluded the annual increase was 0.7% and there was a monthly decrease was 0.4%.

The value of retail sales increased by 2.9% in November 2003 compared to November 2002 and increased by 0.1% in the month. However, if Motor Trades are excluded, the annual increase was 3.0% and the monthly change was -0.9%.

October is the latest month for which final detailed figures are available. The three-month August 2003 – October 2003 volume figures show that, compared with the three months ending July 2003:

- The largest increase in the volume of sales was in the Motor Trades (+8.8%) sector.
- The largest decrease in the volume of sales was in the Other Retail Sales sector (-7.2%) sector.

All figures in this release are trading day and seasonally adjusted. The seasonal factors are based on unadjusted indices up to November 2003.

*For more information contact Steve MacFeely (021) 453 5303 or Olive Loughnane on (021) 453 5209.*

**Table 1 Seasonally Adjusted Indices of Total Retail Sales<sup>1</sup>**
**Base Year: 2000 = 100**

Total Retail Sales for all Businesses Combined							
Period	Value of Sales			Volume of Sales			
	Index	% change on previous period	Annual % change	Index	% change on previous period	Annual % change	
2001 Year	103.5	3.5	3.5	101.8	1.8	1.8	
2002 Year	106.2	2.6	2.6	101.9	0.1	0.1	
2002 1st quarter	103.3	-3.1	3.6	99.9	-4.2	1.7	
2nd quarter	103.7	0.4	2.1	100.0	0.1	-0.4	
3rd quarter	106.2	2.4	2.9	101.5	1.5	0.2	
4th quarter	108.4	2.1	1.7	103.0	1.5	-1.2	
2003 1st quarter	107.4	-0.9	4.0	101.1	-1.8	1.2	
2nd quarter	107.2	-0.2	3.4	101.3	0.2	1.3	
3rd quarter	109.1	1.8	2.7	102.0	0.7	0.5	
2002 June	103.8	-0.6	0.9	99.4	-1.9	-1.4	
July	105.9	2.0	2.6	100.9	1.4	0.0	
August	104.7	-1.1	1.0	99.8	-1.0	-1.3	
September	107.6	2.7	4.9	103.4	3.6	1.7	
October	107.5	-0.1	1.9	102.6	-0.8	-0.9	
November	107.2	-0.3	1.5	102.2	-0.4	-1.1	
December	110.1	2.7	1.6	104.0	1.8	-1.6	
2003 January	108.8	-1.2	7.1	102.5	-1.5	4.0	
February	105.6	-3.0	0.6	99.6	-2.8	-2.0	
March	107.7	2.1	4.4	101.2	1.6	1.6	
April	109.2	1.4	6.2	102.6	1.4	3.4	
May	103.3	-5.4	-1.2	98.6	-4.0	-2.8	
June	108.6	5.2	4.6	102.4	3.9	3.0	
July	107.7	-0.8	1.7	100.3	-2.0	-0.5	
August	110.1	2.2	5.1	102.8	2.5	3.0	
September	109.5	-0.5	1.7	102.6	-0.2	-0.8	
October	110.2	0.6	2.5	103.2	0.5	0.6	
November <sup>2</sup>	110.3	0.1	2.9	103.4	0.2	1.2	

<sup>1</sup> Based on Seasonal Patterns up to Nov 2003

<sup>2</sup> Provisional value and volume of sales indices based on early returns from sample retailers

**Table 2 Seasonally Adjusted Indices of Total Retail Sales (Excluding Motor Trades)<sup>1</sup>****Base Year: 2000 = 100**

Total Retail Sales for all Businesses Combined (Excl Motor Trades)							
Period	Value of Sales			Volume of Sales			
	Index	% change on previous period	Annual % change	Index	% change on previous period	Annual % change	
2001 Year	110.1	10.1	10.1	107.1	7.1	7.1	
2002 Year	114.8	4.3	4.3	108.9	1.7	1.7	
2002 1st quarter	111.9	-0.6	7.0	105.3	-5.1	3.7	
2nd quarter	111.5	-0.4	3.7	107.0	1.6	1.3	
3rd quarter	114.2	2.4	4.5	106.8	-0.2	2.2	
4th quarter	115.2	1.1	2.6	111.0	3.9	0.0	
2003 1st quarter	116.4	0.8	4.0	106.7	-3.9	1.3	
2nd quarter	116.8	0.3	4.8	110.2	3.3	3.0	
3rd quarter	117.5	0.6	2.9	107.3	-2.6	0.5	
2002 June	112.6	0.7	3.9	107.8	0.0	1.2	
July	114.1	1.4	4.2	102.3	-5.0	1.2	
August	114.1	0.0	4.1	107.6	5.2	1.5	
September	114.3	0.2	5.1	109.7	1.9	3.3	
October	114.4	0.0	2.7	110.2	0.5	0.2	
November	114.8	0.4	3.2	111.3	1.0	0.4	
December	116.9	1.8	1.9	111.4	0.1	-0.6	
2003 January	116.0	-0.8	5.7	102.4	-8.1	2.4	
February	116.7	0.6	4.3	108.2	5.6	2.0	
March	116.5	-0.1	2.6	109.0	0.7	-0.1	
April	119.0	2.2	8.4	111.6	2.4	6.1	
May	113.4	-4.7	1.4	107.7	-3.4	0.0	
June	117.7	3.8	4.6	111.2	3.2	3.2	
July	116.7	-0.9	2.3	101.9	-8.4	-0.4	
August	117.0	0.2	2.5	107.6	5.6	0.0	
September	118.5	1.4	3.7	111.3	3.5	1.5	
October	119.4	0.7	4.3	112.5	1.0	2.0	
November <sup>2</sup>	118.3	-0.9	3.0	112.0	-0.4	0.7	

<sup>1</sup> Based on Seasonal Patterns up to Nov 2003<sup>2</sup> Provisional value and volume of sales indices based on early returns from sample retailers

**Table 3 Seasonally Adjusted<sup>1</sup> Value and Volume Indices of Retail Sales for 13 Retail Businesses**  
**Base Year: 2000 = 100**

Retail Business - NACE REV 1	November 2003 <sup>2</sup>					
	Value of Sales			Volume of Sales		
	Index	% change on previous month	Annual % change	Index	% change on previous month	Annual % change
Motor Trades - NACE 50	92.7	2.5	3.7	86.6	2.3	1.4
Non-Specialised Stores (excluding Department Stores) - NACE 52.11	123.9	0.0	2.7	110.7	-0.2	1.2
Department Stores - NACE 52.12	116.3	-0.5	3.2	115.6	-0.6	4.0
of which:-						
Clothing and Footwear	113.8	-1.2	5.8			
Furniture, Soft Furnishing, etc.	108.6	2.1	3.5			
Other Goods and Services	120.6	-0.7	0.2			
<u>Specialised Stores - NACE 52 (remainder)</u>						
Food, Beverages and Tobacco	114.1	-0.2	2.7	99.0	-0.4	-0.2
Pharmaceutical, Medical & Cosmetic Articles	136.6	-4.5	14.0	122.9	-4.5	10.4
Textiles and Clothing	116.9	1.1	5.5	128.7	0.3	8.2
Footwear and Leather	112.9	-1.8	-1.1	125.4	-1.8	2.4
Furniture and Lighting	101.8	-4.1	-9.4	94.2	-4.4	-11.0
Electrical Goods	119.0	0.1	-1.1	110.9	-0.9	-1.9
Hardware, Paints and Glass	124.7	1.5	3.5	108.6	0.8	0.4
Books, Newspapers and Stationery	119.2	0.5	8.3	105.0	2.8	4.4
Other Retail Sales	115.6	-0.6	3.3	95.0	-1.9	0.2
Bars - NACE 55.4	104.0	-2.6	-1.0	89.5	-1.1	-7.1
All Businesses excl. Motor Trades	118.3	-0.9	3.0	112.0	-0.4	0.7
<b>All Businesses</b>	110.3	0.1	2.9	103.4	0.2	1.2
Of which:-						
<u>Combined Groups</u>						
Clothing & Footwear in specialised stores	116.4	0.8	4.7	125.7	-0.3	7.0
Household Equipment	116.9	-1.1	0.0	104.8	-2.8	-2.3
Books, Newspapers, Stationery & Other Goods	116.6	0.4	4.2	104.8	0.6	1.7
Food Businesses	123.0	-0.2	2.7	108.2	-0.9	0.7
All Non-Food	118.6	-1.4	4.3	111.4	-1.7	2.4
All Businesses excl. Motor Trades & Bars	120.4	-1.0	3.5	113.9	-0.8	1.7

<sup>1</sup> Based on Seasonal Patterns up to Nov 2003, individual series are independently adjusted

<sup>2</sup> Provisional value and volume of sales indices based on early returns from sample retailers

**Table 4 Seasonally Adjusted<sup>1</sup> Value and Volume Indices of Retail Sales for 13 Retail Businesses**  
**Base Year: 2000 = 100**

Retail Business - NACE REV 1	October 2003					
	Value of Sales			Volume of Sales		
	Index	% change on previous month	Annual % change	Index	% change on previous month	Annual % change
Motor Trades - NACE 50	90.4	0.7	-2.1	84.7	-4.6	-4.0
Non-Specialised Stores (excluding Department Stores) - NACE 52.11	124.0	2.9	7.4	111.0	2.7	5.3
Department Stores - NACE 52.12	116.9	-2.0	-1.1	116.3	-1.5	0.0
of which:-						
Clothing and Footwear	115.1	-2.1	0.7			
Furniture, Soft Furnishing, etc.	106.4	1.0	-2.0			
Other Goods and Services	121.4	-2.4	-2.9			
<u>Specialised Stores - NACE 52 (remainder)</u>						
Food, Beverages and Tobacco	114.4	-1.7	0.3	99.4	-2.5	-2.6
Pharmaceutical, Medical & Cosmetic Articles	143.0	4.8	15.5	128.7	4.6	11.8
Textiles and Clothing	115.6	0.0	2.4	128.3	0.7	5.6
Footwear and Leather	114.9	-2.8	2.0	127.7	-2.0	5.8
Furniture and Lighting	106.1	-0.7	-1.1	98.5	-0.2	-3.0
Electrical Goods	118.9	-4.0	-1.6	111.8	-3.2	-2.8
Hardware, Paints and Glass	122.9	-2.7	0.7	107.8	-2.8	-2.8
Books, Newspapers and Stationery	118.6	-1.9	5.8	102.1	-4.2	3.7
Other Retail Sales	116.3	2.7	4.3	96.8	-1.6	1.3
Bars - NACE 55.4	106.8	-1.8	-1.5	90.5	-1.6	-7.3
All Businesses excl. Motor Trades	119.4	0.7	4.3	112.5	1.0	2.0
<b>All Businesses</b>	110.2	0.6	2.5	103.2	0.5	0.6
Of which:-						
<u>Combined Groups</u>						
Clothing & Footwear in specialised stores	115.5	-0.6	2.4	126.1	0.3	5.9
Household Equipment	118.2	-2.5	-0.4	107.7	-2.3	-3.3
Books, Newspapers, Stationery & Other Goods	116.1	1.4	4.6	104.2	1.3	2.3
Food Businesses	123.2	2.4	6.8	109.2	2.0	4.3
All Non-Food	120.2	0.3	3.8	113.3	0.1	2.3
All Businesses excl. Motor Trades & Bars	121.5	0.9	5.3	114.8	1.2	3.4

<sup>1</sup> Based on Seasonal Patterns up to Nov 2003, individual series are independently adjusted

**Table 5 Seasonally Adjusted<sup>1</sup> Value and Volume Indices of Retail Sales for 13 Retail Businesses**  
**Base Year: 2000 = 100**

Retail Business - NACE REV 1	August - October 2003					
	Value of Sales			Volume of Sales		
	Index	% change on previous period	Annual % change	Index	% change on previous period	Annual % change
Motor Trades - NACE 50	92.3	5.1	1.7	88.1	8.8	-0.1
Non-Specialised Stores (excluding Department Stores) - NACE 52.11	121.4	2.5	5.2	108.8	2.8	2.9
Department Stores - NACE 52.12	117.3	1.6	0.5	116.6	-0.5	1.1
of which:-						
Clothing and Footwear	116.9	1.7	4.7			
Furniture, Soft Furnishing, etc.	102.1	-0.9	-5.5			
Other Goods and Services	121.5	1.3	-2.5			
<u>Specialised Stores - NACE 52 (remainder)</u>						
Food, Beverages and Tobacco	114.2	-1.1	2.0	99.3	-1.1	-1.4
Pharmaceutical, Medical & Cosmetic Articles	137.8	5.2	11.0	123.4	6.8	7.5
Textiles and Clothing	114.6	0.4	2.2	126.5	-1.4	4.5
Footwear and Leather	116.0	3.5	4.4	128.8	1.6	8.1
Furniture and Lighting	105.9	2.5	-1.7	98.1	1.9	-3.4
Electrical Goods	120.3	-2.8	-1.2	112.5	-2.3	-2.1
Hardware, Paints and Glass	124.9	4.1	2.4	109.9	3.7	-1.2
Books, Newspapers and Stationery	119.1	1.7	5.6	104.3	0.6	2.4
Other Retail Sales	114.0	0.0	2.6	100.4	-7.2	-0.5
Bars - NACE 55.4	108.1	0.4	0.4	91.4	1.0	-5.6
All Businesses excl. Motor Trades	118.3	1.9	3.5	110.5	3.0	1.2
<b>All Businesses</b>	109.9	3.0	3.0	102.8	2.2	0.8
Of which:-						
<u>Combined Groups</u>						
Clothing & Footwear in specialised stores	114.8	0.7	2.6	125.0	-2.3	5.0
Household Equipment	119.5	0.8	0.4	108.7	0.4	-2.2
Books, Newspapers, Stationery & Other Goods	114.7	0.2	3.1	103.2	-1.0	0.2
Food Businesses	120.8	2.3	4.9	107.1	2.3	2.4
All Non-Food	119.2	1.6	3.1	112.6	1.6	1.2
All Businesses excl. Motor Trades & Bars	120.2	2.1	4.1	113.0	2.2	2.2

<sup>1</sup> Based on Seasonal Patterns up to Nov 2003, individual series are independently adjusted

**Table 6****Volume of retail trade in the euro-zone, the EU15 and the Member States<sup>1</sup>  
Annual % change compared with the same month of the previous year**

	May-03	Jun-03	Jul-03	Aug-03	Sep-03	Oct-03
Belgium	1.3	-1.5	-0.3	-2.4	-2.7	2.6
Germany	-1.2	1.0	-1.7	-3.6	-1.9	-1.9
Greece	1.8	1.7	2.1	11.2	:	:
Spain	3.8	4.5	3.2	1.2	2.7	4.1
France	-0.3	1.1	0.4	1.8	1.3	0.8
Ireland	0.0	2.8	0.0	-1.5	1.3	3.0
Italy	1.0	-2.0	-0.3	-3.1	-0.4	-1.5
Luxembourg	3.0	1.0	7.2	2.2	:	:
Netherlands	-3.8	-4.0	-5.0	-4.6	-6.2	-4.7
Austria	-1.1	2.8	-0.2	-2.3	-0.9	1.0
Portugal	-3.0	-3.8	0.9	-2.7	-1.1	-0.3
Finland	3.4	2.6	5.7	5.1	3.6	5.8
Euro-zone	0.0	0.6	-0.1	-1.1	-0.3	0.0
Denmark	0.0	1.9	4.0	2.9	-1.2	4.8
Sweden	2.6	7.1	5.0	6.5	3.6	4.9
United Kingdom	2.0	5.4	3.6	2.9	4.0	3.9
EU15	0.5	1.8	1.0	0.1	0.7	1.1

: Data not available

<sup>1</sup> Data refers to Unadjusted NACE 52 : All Business excluding Motor Trades & Bars

Source: Eurostat

**Table 7****Volume of retail trade in the Acceding Countries  
Annual % change compared with the same month of the previous year**

	May-03	Jun-03	Jul-03	Aug-03	Sep-03	Oct-03
Czech Republic	2.0	3.7	5.5	5.6	4.4	4.0
Estonia	-1.1	2.6	4.0	1.5	-4.0	3.8
Cyprus	-4.0	-6.7	0.2	0.0	4.0	:
Latvia	10.4	14.4	16.2	12.7	12.6	18.1
Lithuania	9.2	9.1	14.2	13.7	11.2	13.4
Hungary	5.2	6.3	9.8	7.1	8.6	8.6
Malta	:	:	:	:	:	:
Poland	:	:	:	:	:	:
Slovenia	2.9	0.6	3.1	2.8	5.3	5.1
Slovakia	-6.4	-9.5	-7.7	-5.3	-6.1	-5.0

: Data not available

<sup>1</sup> Data refers to Unadjusted NACE 52 : All Business excluding Motor Trades & Bars

Source: Eurostat

## Background Notes

<b>Retail Sales Index</b>	<p><b>Introduction of updated series with base year 2000 = 100.</b></p> <p>An updated Retail Sales Index (RSI) was introduced in the November 2003 release. The underlying methodology remains unchanged. The index is primarily intended to measure short-term trends. For long term analysis allowance must be made for the fact that the series does not reflect changes in retail structures between updatings.</p>
<b>Reference Period</b>	<p>The October period covers the 4 weeks from 28/09/03 to 25/10/03 and the November period covers the 4 weeks from 26/10/03 to 22/11/03.</p>
<b>New Base Year</b>	<p>The set of new monthly retail sales indices has been compiled with reference to base year 2000 = 100. The underlying structural weighting system is mainly based on the 2000 Annual Services Inquiry. Weights are updated from year to year using ratios of average weekly turnover by size class within business type.</p>
<b>Scope and Coverage</b>	<p>The Retail Sales Index covers, on a sample basis, the retail sales of retail businesses, wholesale businesses with sizeable retailing activity and the separate sales establishments of non-distribution enterprises. Excluded from the index coverage are the direct retail sales from non-distribution establishments together with the incidental retail sales of wholesale businesses. Also excluded are sales by hawkers, street stalls and other retailing activities not conducted from permanent business premises. The statistical unit used for reporting sales figures in this inquiry is the enterprise (i.e. complete business covering all branches).</p>
<b>Methodology</b>	<p>The business categories are based mainly on the Statistical Classification of Economic Activities in the European Community (NACE Rev. 1). The index system is structured on the retailing enterprises covered in the 2000 Annual Services Inquiry classified by 13 retail business categories and four turnover (excluding VAT) ranges<sup>1</sup>.</p> <p>The value indices are calculated by updating the aggregate 2000 retail turnover (including VAT) of these enterprises in these fifty one cells using the monthly retail sales data provided by the enterprise respondent panel from 2000 onwards.</p> <p>The compilation of the index for a current month is based on the percentage change in average weekly sales in these cells over the corresponding monthly period of the previous year. The monthly volume indices are calculated by deflating the seasonally unadjusted value indices by specially constructed retail price indices derived from the Consumer Price Index (CPI).</p>
<b>Seasonal Adjustment</b>	<p>The seasonally adjusted series are updated twice yearly using patterns up to and including the preceding month. The present seasonally adjusted monthly value and volume series are based on seasonal patterns from January 1999 to November 2003. The duration is sufficient for seasonal adjustment ; the process will improve as the series is extended. The adjustment is completed by applying the X-11 Variant of the US Bureau of the Census Method 11 Seasonal Adjustment program based on a multiplicative model. The unadjusted series, from which trading day variations have been eliminated, are available on our website (<a href="http://www.cso.ie">www.cso.ie</a>).</p>
<b>References</b>	<p>A detailed description of the Retail Sales Index is available on the cso website <a href="http://www.cso.ie">www.cso.ie</a>. Retrospective details covering three years are provided for all series on both a seasonally adjusted and an unadjusted basis in each issue of the Statistical Bulletin.</p>

<sup>1</sup> The Department Stores business category is not classified by annual turnover but is sub-divided into three retail activity categories.