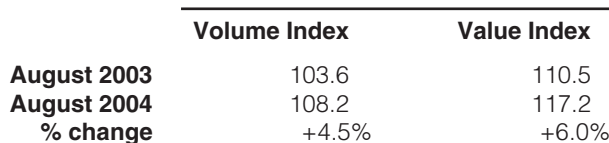




Retail Sales Index

August 2004 (First Estimates)
July 2004 (Final Figures)

Retail Sales Index – All Businesses
(Base year 2000 = 100)



The volume of retail sales (i.e. excluding price effects) increased by 4.5% in August 2004 compared to August 2003. There was a monthly increase of 4.4%. If Motor Trades are excluded the annual increase was 4.6% and the monthly change was +1.9%.

The value of retail sales increased by 6.0% in August 2004 compared to August 2003 and increased by 4.8% in the month. However, if Motor Trades are excluded, the annual increase was 5.1% and the monthly change was +2.2%.

July is the latest month for which final detailed figures are available. The three-month May 2004 – July 2004 volume figures show that, compared with the three months ending April 2004:

- The largest increase in the volume of sales was in the Hardware, Paints & Glass (+4.7%) sector.
- The largest decrease in the volume of sales was in the Bar (-3.2%) sector.

All figures in this release are trading day and seasonally adjusted. The seasonal factors are based on unadjusted indices up to April 2004.

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Table 1 Seasonally Adjusted Indices of Total Retail Sales¹**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	103.3	3.3	3.3	101.5	1.5	1.5
2002 Year	106.0	2.6	2.6	101.7	0.1	0.1
2003 Year	109.3	3.2	3.2	102.6	0.9	0.9
2002 1st quarter	103.5	-2.3	3.5	100.7	-2.5	1.3
2nd quarter	104.4	0.9	1.8	100.3	-0.4	-0.7
3rd quarter	106.6	2.1	3.2	102.0	1.7	0.8
4th quarter	107.9	1.2	1.8	102.5	0.5	-0.8
2003 1st quarter	108.0	0.0	4.3	101.9	-0.6	1.1
2nd quarter	107.8	-0.2	3.2	101.4	-0.5	1.1
3rd quarter	109.7	1.8	2.9	102.8	1.4	0.8
4th quarter	110.5	0.7	2.3	103.1	0.2	0.6
2004 1st quarter	111.9	1.3	3.6	104.6	1.4	2.7
2nd quarter	112.9	0.9	4.7	104.8	0.3	3.4
2003 March	107.3	-0.1	5.0	101.0	-0.3	1.7
April	109.8	2.3	5.9	103.2	2.1	3.2
May	104.0	-5.2	-1.5	97.8	-5.2	-3.4
June	109.2	4.9	4.9	102.8	5.1	3.2
July	108.5	-0.6	1.9	102.1	-0.7	-0.1
August	110.5	1.9	5.3	103.6	1.5	3.2
September	110.1	-0.4	1.9	102.9	-0.7	-0.2
October	110.1	0.0	2.0	103.0	0.1	0.3
November	110.3	0.2	2.3	103.0	0.0	0.4
December	110.9	0.5	2.6	103.2	0.2	0.9
2004 January	110.8	0.0	1.2	103.5	0.3	0.1
February	110.9	0.1	3.3	103.7	0.2	2.3
March	113.5	2.3	5.8	106.1	2.3	5.0
April	113.1	-0.4	3.0	105.5	-0.6	2.3
May	110.8	-2.0	6.5	102.9	-2.5	5.2
June	114.3	3.2	4.7	105.9	2.9	2.9
July	111.8	-2.2	3.1	103.6	-2.1	1.5
August ²	117.2	4.8	6.0	108.2	4.4	4.5

¹ Based on Seasonal Patterns up to April 2004² 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)¹**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	1.6	1.6
2003 Year	119.2	3.8	3.8	110.6	1.6	1.6
2002 1st quarter	112.5	-0.5	7.1	107.6	-1.2	4.0
2nd quarter	112.5	0.0	3.6	106.9	-0.7	0.6
3rd quarter	115.1	2.3	4.4	109.0	2.0	2.2
4th quarter	116.0	0.8	2.7	109.2	0.2	0.3
2003 1st quarter	117.1	1.0	4.1	109.1	-0.1	1.4
2nd quarter	118.0	0.7	4.9	109.8	0.6	2.8
3rd quarter	118.6	0.5	3.0	109.8	0.0	0.8
4th quarter	119.8	1.0	3.3	110.7	0.8	1.4
2004 1st quarter	120.9	0.9	3.2	111.8	0.9	2.4
2nd quarter	122.0	1.0	3.4	112.9	1.0	2.8
2003 March	117.1	-0.5	2.8	108.7	-0.9	-0.1
April	120.4	2.9	8.6	111.8	2.8	5.8
May	114.6	-4.8	1.4	106.7	-4.5	-0.7
June	118.7	3.6	4.7	110.8	3.8	3.2
July	117.7	-0.8	2.5	109.4	-1.2	0.4
August	117.9	0.1	2.5	109.1	-0.3	0.2
September	119.8	1.6	3.8	110.7	1.5	1.5
October	120.0	0.2	4.1	111.0	0.3	2.0
November	119.7	-0.2	3.1	110.6	-0.4	1.1
December	119.7	0.0	2.8	110.6	0.0	1.0
2004 January	120.5	0.7	3.4	111.6	0.9	2.2
February	120.2	-0.3	2.1	111.2	-0.3	1.4
March	121.7	1.2	3.9	112.4	1.0	3.4
April	121.6	-0.1	1.0	112.5	0.1	0.7
May	120.3	-1.1	4.9	111.5	-0.9	4.5
June	123.8	2.9	4.3	114.4	2.6	3.3
July	121.2	-2.1	3.0	112.0	-2.1	2.3
August ²	123.9	2.2	5.1	114.1	1.9	4.6

¹ Based on Seasonal Patterns up to April 2004² Provisional value and volume of sales indices based on early returns from sample retailers

Table 3 Seasonally Adjusted¹ Value and Volume Indices of Retail Sales for 13 Retail Businesses
(Preliminary Estimates) Base Year: 2000 = 100

Retail Business - NACE REV 1	August 2004					
	Value of Sales			Volume of Sales		
	Index	% change on previous month	Annual % change	Index	% change on previous month	Annual % change
Motor Trades - NACE 50	103.8	12.5	8.3	92.8	7.7	5.4
Non-Specialised Stores (excluding Department Stores) - NACE 52.11	127.7	1.7	5.2	113.3	1.3	4.7
Department Stores - NACE 52.12	123.9	6.7	6.8	127.2	6.2	8.8
of which:-						
Clothing and Footwear	140.8	11.9	18.4			
Furniture, Soft Furnishing, etc.	100.5	-1.3	9.2			
Other Goods and Services	108.8	0.0	-8.0			
<u>Specialised Stores - NACE 52 (remainder)</u>						
Food, Beverages and Tobacco	121.4	7.1	8.5	104.0	6.8	7.2
Pharmaceutical, Medical & Cosmetic Articles	146.6	6.7	9.4	127.4	6.3	8.1
Textiles and Clothing	121.1	3.1	8.5	137.7	1.0	12.3
Footwear and Leather	124.4	7.9	9.1	144.2	6.5	14.1
Furniture and Lighting	108.8	-9.8	4.2	100.6	-10.4	4.2
Electrical Goods	131.5	3.5	11.8	123.3	3.4	12.1
Hardware, Paints and Glass	138.4	3.3	11.4	120.3	3.4	9.2
Books, Newspapers and Stationery	116.3	1.5	-1.0	100.5	1.2	-2.7
Other Retail Sales	120.3	0.3	6.5	108.2	-0.2	5.0
Bars - NACE 55.4	107.4	2.4	-3.1	88.1	2.1	-5.2
All Businesses excl. Motor Trades	123.9	2.2	5.1	114.1	1.9	4.6
All Businesses	117.2	4.8	6.0	108.2	4.4	4.5
Of which:-						
<u>Combined Groups</u>						
Clothing & Footwear in specialised stores	121.9	4.1	8.6	138.6	2.2	12.5
Household Equipment	131.1	1.5	10.4	118.1	1.2	9.4
Books, Newspapers, Stationery & Other Goods	119.4	0.0	4.9	105.9	-0.5	3.2
Food Businesses	127.1	2.1	5.5	111.2	1.8	4.8
All Non-Food	126.7	2.7	7.8	117.5	2.3	6.1
All Businesses excl. Motor Trades & Bars	127.4	2.4	6.7	119.0	1.9	6.3

¹ Based on Seasonal Patterns up to April 2004, individual series are independently adjusted

Table 4 Seasonally Adjusted¹ Value and Volume Indices of Retail Sales for 13 Retail Businesses
Base Year: 2000 = 100

Retail Business - NACE REV 1	July 2004					
	Value of Sales			Volume of Sales		
	Index	% change on previous month	Annual % change	Index	% change on previous month	Annual % change
Motor Trades - NACE 50	92.2	-1.9	3.2	86.1	-1.6	1.0
Non-Specialised Stores (excluding Department Stores) - NACE 52.11	125.6	-1.0	4.6	111.9	-0.5	4.3
Department Stores - NACE 52.12	116.2	-6.1	1.3	119.8	-5.1	3.2
of which:-						
Clothing and Footwear	125.8	-8.0	9.7			
Furniture, Soft Furnishing, etc.	101.9	-6.5	0.8			
Other Goods and Services	108.8	-1.9	-8.1			
<u>Specialised Stores - NACE 52 (remainder)</u>						
Food, Beverages and Tobacco	113.4	-8.1	-1.4	97.5	-8.3	-2.5
Pharmaceutical, Medical & Cosmetic Articles	137.5	-4.7	4.9	119.8	-4.4	3.9
Textiles and Clothing	117.4	-4.7	1.0	136.3	-3.3	4.4
Footwear and Leather	115.2	-6.6	-0.9	135.4	-5.8	3.3
Furniture and Lighting	120.7	9.4	13.4	112.4	7.7	13.4
Electrical Goods	127.1	4.7	1.7	119.3	4.6	2.0
Hardware, Paints and Glass	133.9	-3.7	9.7	116.3	-4.0	7.4
Books, Newspapers and Stationery	114.6	-10.6	5.9	99.3	-10.6	3.8
Other Retail Sales	120.0	0.1	4.4	108.4	0.3	2.8
Bars - NACE 55.4	104.8	-3.9	-4.7	86.3	-5.0	-6.8
All Businesses excl. Motor Trades	121.2	-2.1	3.0	112.0	-2.1	2.3
All Businesses	111.8	-2.2	3.1	103.6	-2.1	1.5
Of which:-						
<u>Combined Groups</u>						
Clothing & Footwear in specialised stores	117.2	-5.0	0.8	135.7	-3.9	3.9
Household Equipment	129.1	0.9	7.8	116.7	1.5	6.7
Books, Newspapers, Stationery & Other Goods	119.4	-1.7	4.6	106.4	-0.7	2.9
Food Businesses	124.5	-1.5	4.0	109.3	-1.4	3.4
All Non-Food	123.4	-2.7	4.5	114.8	-2.9	2.9
All Businesses excl. Motor Trades & Bars	124.4	-1.5	4.3	116.7	-1.1	3.9

¹ Based on Seasonal Patterns up to April 2004, individual series are independently adjusted

Table 5 Seasonally Adjusted¹ Value and Volume Indices of Retail Sales for 13 Retail Businesses
Base Year: 2000 = 100

Retail Business - NACE REV 1	May - July 2004					
	Value of Sales			Volume of Sales		
	Index	% change on previous period	Annual % change	Index	% change on previous period	Annual % change
Motor Trades - NACE 50	93.4	-2.1	6.4	87.7	-2.2	4.0
Non-Specialised Stores (excluding Department Stores) - NACE 52.11	126.0	1.1	4.7	111.9	1.1	4.1
Department Stores - NACE 52.12	121.2	2.5	3.9	124.4	3.0	5.6
of which:-						
Clothing and Footwear	129.6	12.9	12.6			
Furniture, Soft Furnishing, etc.	105.3	-2.2	0.3			
Other Goods and Services	114.5	-10.0	-5.7			
<u>Specialised Stores - NACE 52 (remainder)</u>						
Food, Beverages and Tobacco	118.1	2.4	2.1	101.7	2.2	0.8
Pharmaceutical, Medical & Cosmetic Articles	140.9	2.8	6.7	123.0	2.6	5.6
Textiles and Clothing	121.4	0.5	6.3	139.6	1.3	9.5
Footwear and Leather	120.0	3.4	5.9	139.7	4.6	10.1
Furniture and Lighting	115.5	3.5	10.6	108.3	4.3	10.2
Electrical Goods	120.9	2.6	-3.4	113.4	2.7	-3.3
Hardware, Paints and Glass	139.0	5.1	16.1	121.0	4.7	13.6
Books, Newspapers and Stationery	120.9	4.3	3.5	105.3	4.4	1.7
Other Retail Sales	117.8	1.3	3.4	106.6	0.6	1.6
Bars - NACE 55.4	106.3	-2.8	-2.4	88.5	-3.2	-4.0
All Businesses excl. Motor Trades	121.9	0.6	4.1	112.8	0.6	3.4
All Businesses	112.5	-0.1	4.7	104.3	-0.9	3.3
Of which:-						
<u>Combined Groups</u>						
Clothing & Footwear in specialised stores	121.3	0.9	6.3	139.4	1.5	9.4
Household Equipment	128.1	3.6	8.6	115.6	3.6	7.2
Books, Newspapers, Stationery & Other Goods	118.6	2.2	3.5	105.5	1.2	1.7
Food Businesses	125.0	1.0	4.4	109.9	1.2	3.6
All Non-Food	124.4	2.1	5.9	116.1	1.7	4.3
All Businesses excl. Motor Trades & Bars	124.6	1.5	5.1	116.6	1.3	4.6

¹ Based on Seasonal Patterns up to April 2004, individual series are independently adjusted

Table 6

Volume of retail trade in the euro-zone, the EU15, the EU25 and Member States¹
Annual % change compared with the same month of the previous year

	Feb-04	Mar-04	Apr-04	May-04	Jun-04	Jul-04
Belgium	-0.2	-0.4	1.3	-2.0	3.4	2.2
Germany	-2.2	-0.5	-1.5	-5.7	-0.6	0.2
Greece	6.4	5.4	5.9	4.3	5.0	6.6
Spain	4.6	4.5	4.2	1.3	2.2	3.1
France	1.8	1.1	0.7	-0.6	4.5	1.2
Ireland	2.1	4.0	2.0	5.6	4.2	3.5
Italy	-2.5	-2.8	-1.6	-5.3	-0.8	-2.3
Luxembourg	0.6	3.5	2.5	-2.4	:	:
Netherlands	-4.4	-2.1	-1.5	-0.7	-0.7	c
Austria	-0.9	0.4	2.7	-1.3	2.0	3.6
Portugal	-0.9	1.0	10.9	-0.7	3.8	1.1
Finland	3.0	5.1	5.8	5.1	4.2	5.0
Euro-zone	-0.1	0.4	0.5	-2.3	1.6	0.9
Denmark	5.4	8.9	7.5	5.5	7.5	7.3
Sweden	7.7	5.6	3.6	5.2	4.2	3.4
United Kingdom	5.8	6.8	5.5	8.1	6.8	6.1
EU15	1.6	2.1	1.8	0.3	3.0	2.3
Czech Republic	2.2	2.4	3.3	1.2	3.2	2.5
Estonia	14.1	12.1	19.3	12.2	8.5	11.6
Cyprus	0.5	7.1	5.9	-3.5	1.9	:
Latvia	13.2	13.5	17.7	13.1	10.9	8.6
Lithuania	13.3	16.7	16.8	8.8	12.3	6.7
Hungary	7.6	4.4	7.8	6.3	7.5	7.2
Malta	:	:	:	:	:	:
Poland	8.1	10.3	20.7	2.3	5.6	5.4
Slovenia	-3.6	1.8	2.3	1.3	5.3	3.8
Slovakia	4.2	6.3	7.3	7.7	9.9	11.9
EU25	1.8	2.4	2.5	0.5	3.1	2.4

: Data not available

¹ Data refers to Working Day Adjusted NACE 52 : All Business excluding Motor Trades & Bars

Source: Eurostat

Background Notes

Retail Sales Index	<p>Introduction of updated series with base year 2000 = 100.</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>
Reference Period	<p>The July period covers the 4 weeks from 04/07/04 to 31/07/04 and the August period covers the 4 weeks from 01/08/04 to 28/08/04.</p>
New Base Year	<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>
Scope and Coverage	<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>
Methodology	<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) ranges¹.</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>
Seasonal Adjustment	<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 April 2004. The duration is just sufficient for seasonal adjustment; the process will improve as the series is extended. The adjustments are completed by applying the X-11 Variant of the US Bureau of the Census Method 11 Seasonal Adjustment program based on individually selected multiplicative models. The unadjusted series, from which trading day variations have been eliminated, are available on our website (www.cso.ie).</p>
References	<p>A detailed description of the Retail Sales Index is available on the cso website www.cso.ie. 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>

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