

Convenience Store News

770 Broadway, New York NY 10003

t: 646-654-7658 ■ f: 646-654-7676

sdouglas@csnews.com ■ www.csnews.com

mission

Our mission is to deliver the insight, analysis, proprietary market research and business intelligence the help c-store retailers stay ahead of what's next – critical information to grow sales and profits.

industry overview

A store census performed by Nielsen TDLinx in 2008 shows the industry has a total of 144,875 stores. And, according to the *Convenience Store News* 2009 Industry Report, overall industry sales in 2008 increased 11.4 percent, or \$65.1 billion, totaling a record \$633.9 billion.

facts and figures

Store Count

89,567 Single Stores	55,308 Chain-Operated Stores
Total number of convenience stores	
144,875	

Source: Nielsen TDLinx, December 2008

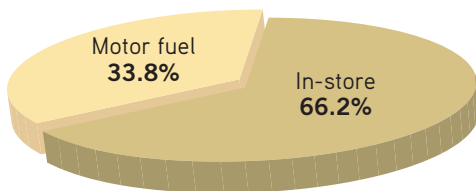
Total C-Store Sales \$633.9 Billion

- Total motor fuel sales \$467.9
- Total merchandise sales \$144.6
- Total foodservice sales \$21.4

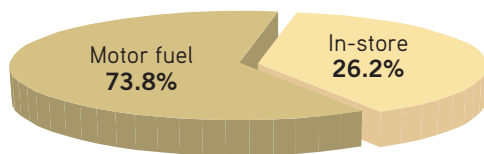
Annual Sales Per Location

- Average motor fuel sales/store \$4.2 million
- Average in-store sales/store \$1.2 million

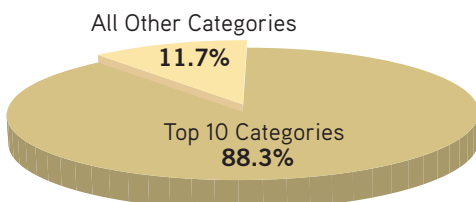
industry profit mix¹



industry sales mix¹



top 10 categories as a percent of sales¹



¹Source: *Convenience Store News* 2009 Industry Report

top 10 in-store categories

Categories	% of In-store Sales	Total Industry Sales (in millions)	Average Sales/Store
1. Cigarettes	30.8%	\$51,099	\$360,344
2. Foodservice	12.9	21,350	150,558
3. Packaged Beverages	12.0	19,891	140,269
4. Beer/Malt Beverages*	10.7	17,778	125,368
5. Edible Grocery	5.7	9,520	67,133
6. Other Tobacco	3.9	6,538	46,105
7. General Merchandise	3.8	6,220	43,862
8. Candy/Gum	3.1	5,199	36,662
9. Fluid Milk Products	2.9	4,847	34,180
10. Non-edible Grocery	2.5	4,089	28,835

top 10 TOTAL **88.3%** **\$146,531** **\$1,033,316**

* Beer represents 13.8% of in-store sales for the 75.1% of stores that sell beer, wine and liquor, or \$166,935 in average store sales.

Source: *Convenience Store News* 2009 Industry Report

industry dynamics¹

- Roughly 91,500 operating companies control the buying power for the 144,875 store locations
- 92 companies have more than 100 stores
- 1,933 companies have more than 2 stores
- 62% of all stores are single-store operations, 89,567 in total
- Single stores account for 57% of industry in-store sales volume
- 7,680 locations closed and 6,160 opened in 2008

These facts, coupled with the knowledge that chain store managers are critical for in-store execution and sell-through of programs, make it clear: TOTAL MARKET COVERAGE to ALL THE DECISION MAKERS is absolutely necessary for suppliers to be successful in the C-store arena.

unduplicated brand reach of 193,886²

In fact, taking the average unique visitors to our website and unique newsletter recipients who do not subscribe to *CSNews* added to our *CSNews* and *CSNews for the Single Store Owner* subscribers, our unduplicated reach is 193,886.

total industry coverage

Only *Convenience Store News* can clearly demonstrate that the combination of its magazines, Web sites and newsletters touches more of the key retailing executives at 100% of convenience chains and ALL single-store operators.² From the corner office to the store floor, those who receive *Convenience Store News* are the ones who drive sell-in and sell-through.

retailer preference

Since 1969, *Convenience Store News* has been keeping retailers ahead of what's next, supporting their business and retailing success by providing a unique blend of business intelligence, news analysis, renowned proprietary industry research and shopper insights. This "must read" editorial for retailers has led to readership among all convenience retailers that is 65% greater than any other industry trade media brand.³

¹Source: Nielsen TDLinx, December 2008 & *Convenience Store News* 2009 Industry Report

²Source: Publisher's own data

³Source: 2009 Convenience Industry Media Usage Study