





The Canadian Convenience Stores Association (CCSA) would like to thank its National Associate Members for their generous support of the 2017 Facts & Figures Report.



















































































































Welcome Message

This year, Canadians are celebrating the 150th anniversary of our nation! Just as Canada has changed by leaps and bounds since 1867, so has the footprint of the convenience and fuel retail channel. But, one thing that has not changed is the tremendous contributions that our channel makes to growing strong, vibrant communities throughout the country.

So much so that we celebrated those contributions in 2017 by holding the first national C-store Day on August 30th. Started in Atlantic Canada, C-Store Day had become such a major event in the East that we could not think of a better time to take it national than Canada's sesquicentennial. C-Store Day was an opportunity to help raise the profile of c-stores among our elected leaders and the general public; reinforcing the critical role that the 27,239 convenience stores in Canada play in growing the communities they serve; and generating positive media coverage for a channel that sells \$56 billion annually in goods and services and employs over 234,000 people. And, we partnered with the Children's Wish Foundation to raise money for a child diagnosed with a life-threatening illness. All in all, it was an opportunity to showcase the heart of our channel!

Like our nation, Canada's convenience and fuel retail channel continues to adapt and evolve as reflected in the following pages of the 2017 Annual Facts & Figures Report. We developed this report to help channel players to make informed decisions about operating their businesses, while giving regulators and the general public a snapshot of the importance of this retail channel - growing number of c-store sites and employment opportunities; fuel and food options as growing drivers for success; and, continuing to meet changing consumer preferences.

It is our hope that this report will help our channel to stay ahead of the curve and to continue to ensure that Canadians can find what they need, when they need it. In the end, that is what convenience is all about!

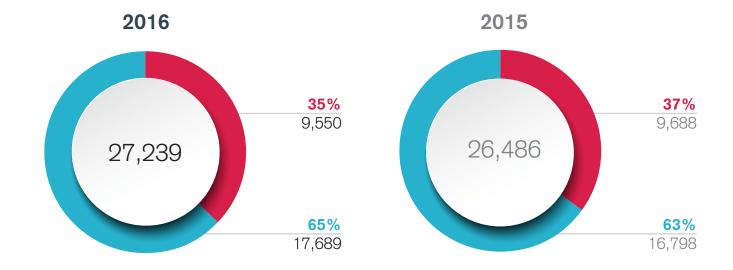


Data in this report comes from leading research organizations, including Abacus Data, Statistics Canada, Nielsen Canada, the Interprovincial Lottery Corporation, The Kent Group and from government finance reports on tax revenue.



INDEPENDENT*

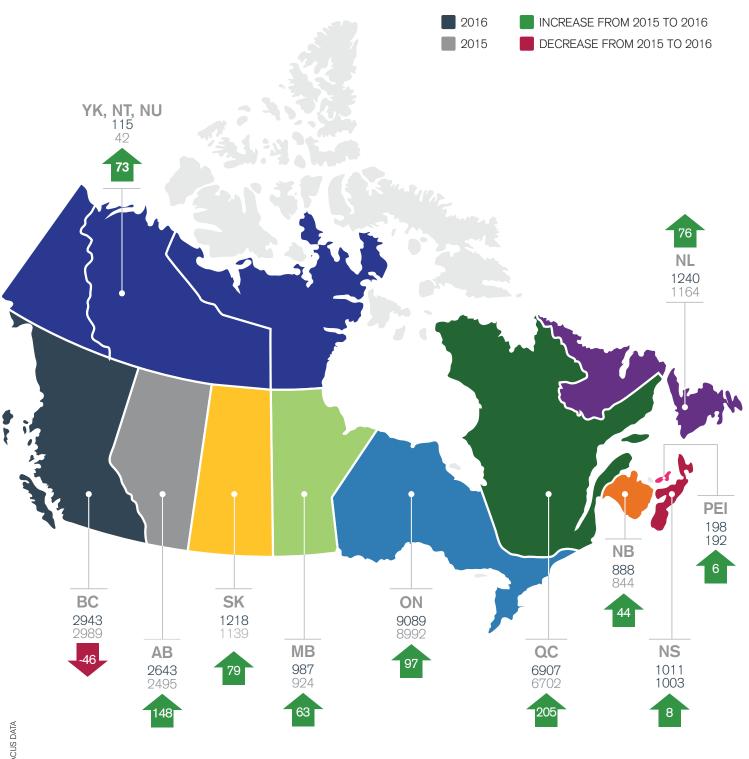
CORPORATE



2016	YK, NT, NU	ВС	АВ	SK	МВ	ON	QC	NL	NB	PEI	NS
INDEPENDENT	102	1651	1416	957	718	5768	4657	971	669	138	642
CORPORATE	13	1292	1227	261	269	3321	2250	269	219	60	369
TOTAL	115	2943	2643	1218	987	9089	6907	1240	888	198	1011
2015	YK, NT, NU	ВС	AB	SK	MB	ON	QC	NL	NB	PEI	NS
INDEPENDENT	31	1737	1241	712	561	5560	4584	936	643	146	647
CORPORATE	11	1252	1254	427	363	3432	2118	228	201	46	356
TOTAL	42	2989	2495	1139	924	8992	6702	1164	844	192	1003

^{*} An independent is defined as a retailer that has control over the site's operations including determining and controlling inventory in the store, even though their gas or retail offerings may be branded.

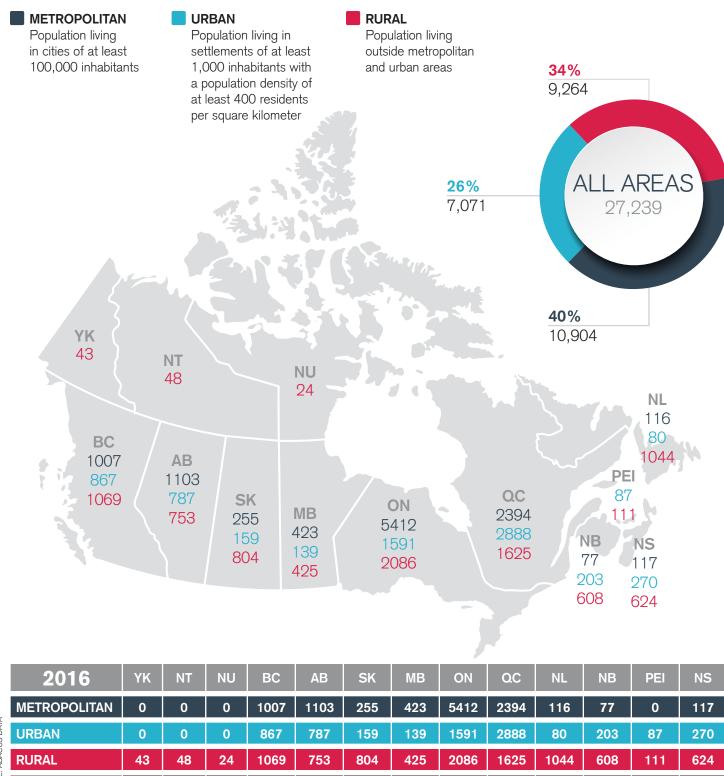




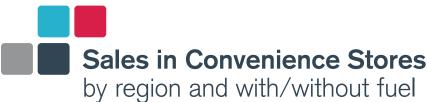


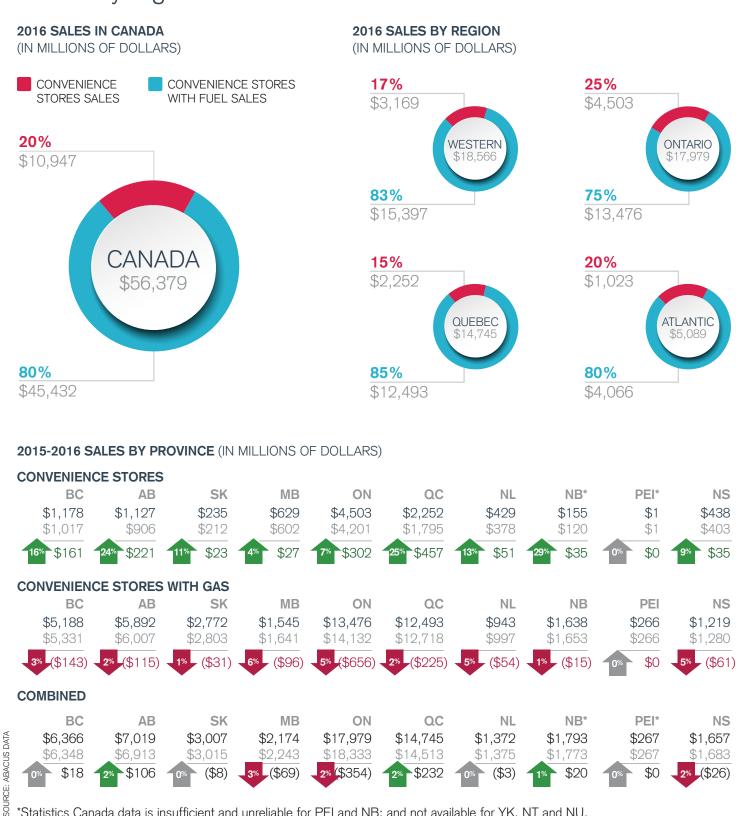
Location of Convenience Stores

by region and size of community



TOTAL





^{*}Statistics Canada data is insufficient and unreliable for PEI and NB; and not available for YK, NT and NU.

\$18,333

(\$354)

\$14,513

\$232

\$2,243

(\$69)

\$6,348

\$6,913

\$106

\$3,015

(\$8)

\$1,375

(\$3)

\$1,773

\$20

\$267

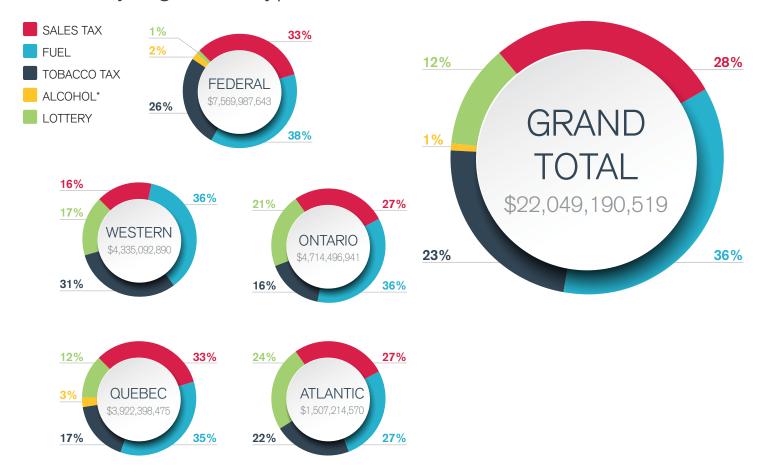
\$0

\$1,683 **2**% (\$26)



Taxes collected by Convenience Stores

by region and type of tax



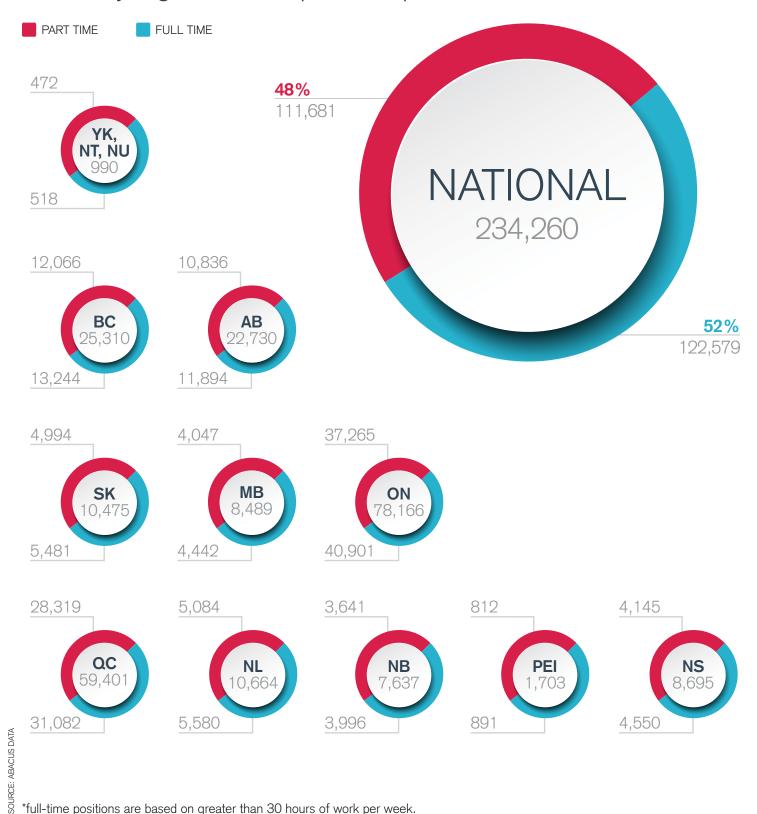
TAX REVENUE COLLECTED BY CANADIAN CONVENIENCE STORES IN 2016

	FEDERAL	WESTERN	ONTARIO	QUEBEC	ATLANTIC	GRAND TOTAL
SALES TAX	\$2,515,456,709	\$687,028,632	\$1,283,474,667	\$1,282,829,640	\$407,046,890	\$6,175,836,538
FUEL	\$2,907,798,910	\$1,584,925,153	\$1,701,300,000	\$1,382,227,489	\$407,046,890	\$7,983,298,442
TOBACCO TAX	\$1,949,220,881	\$1,339,682,864	\$735,600,000	\$649,800,000	\$334,507,800	\$5,008,811,545
ALCOHOL*	\$143,583,505	\$0	\$0	\$136,310,000	\$0	\$279,893,505
LOTTERY	\$53,927,638	\$723,456,241	\$994,122,274	\$471,231,346	\$358,612,990	\$2,601,350,489
TOTAL	\$7,569,987,643	\$4,335,092,890	\$4,714,496,941	\$3,922,398,475	\$1,507,214,570	\$22,049,190,519
STORE AVERAGE	\$277,910	\$556,423	\$518,704	\$567,887	\$451,668	\$809,471

^{*} The data collected for this specific tax category is limited due to the lack of standardized tax revenue reporting by provincial tax authorities. As an example, alcohol revenue from convenience stores in Newfoundland is not recorded nor are agency liquor sales in any provinces.

Employment generated by Convenience Stores

by region and full/part time positions

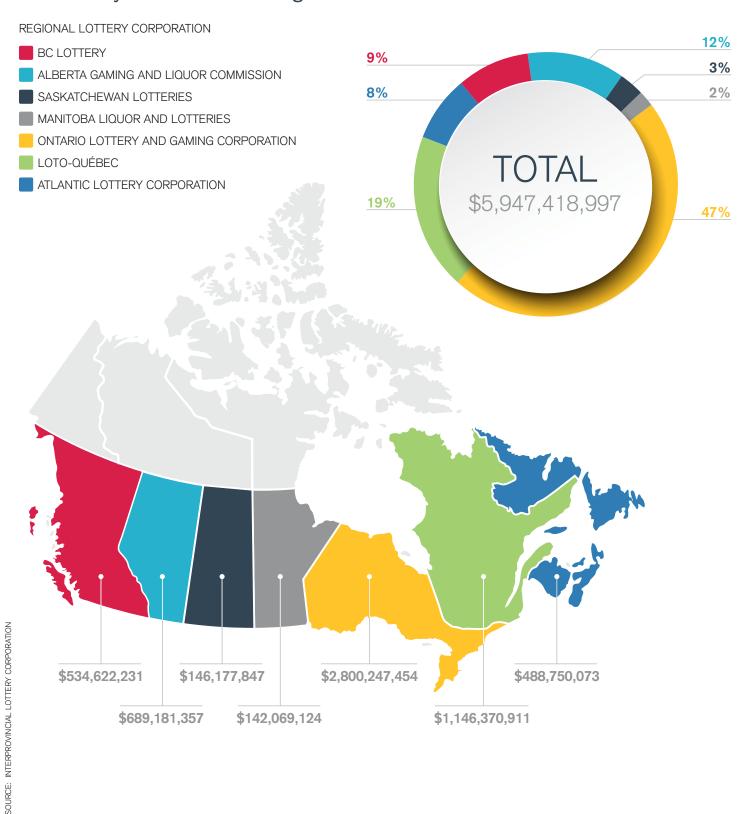


^{*}full-time positions are based on greater than 30 hours of work per week.



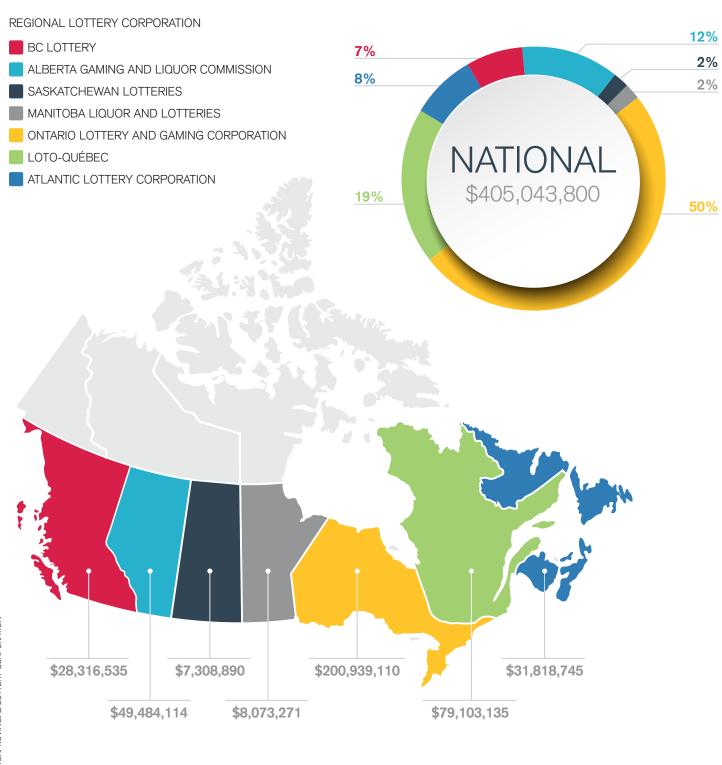
Lottery Sales generated by Convenience Stores

by national and regional sales





Commission Earned by Retailers on Lottery Sales by national and regional sales

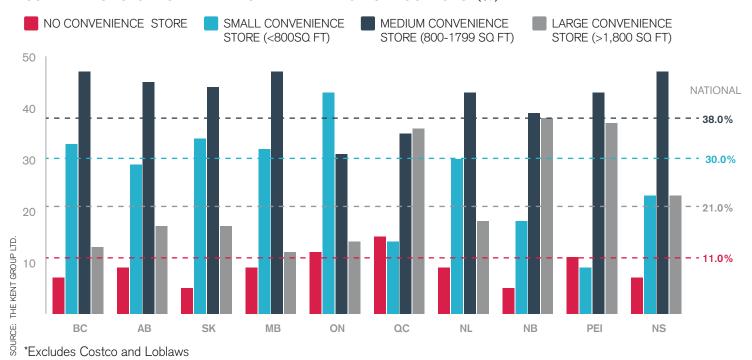


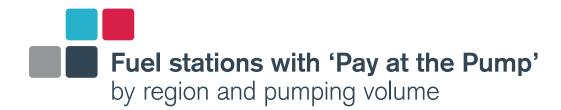


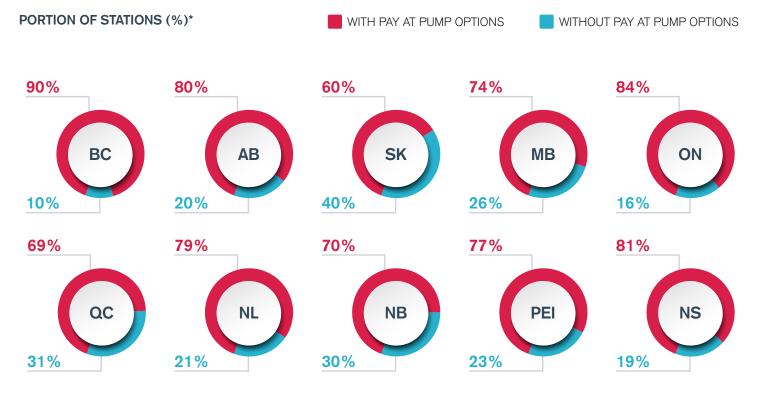
GASOLINE STATIONS ACROSS CANADA



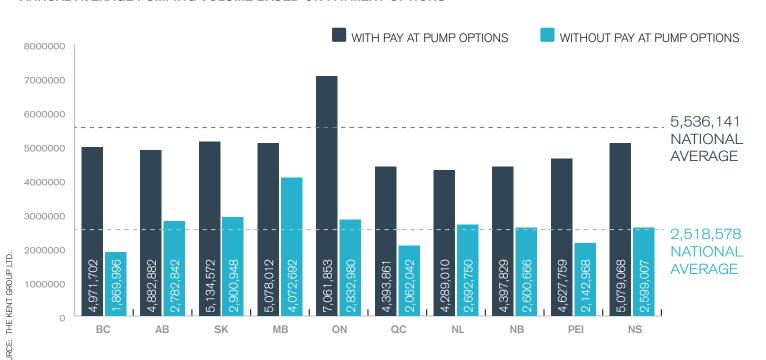
CONVENIENCE STORE SIZE WITHIN CANADIAN PETROLEUM LOCATIONS* (%)

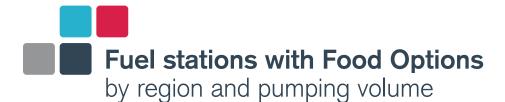


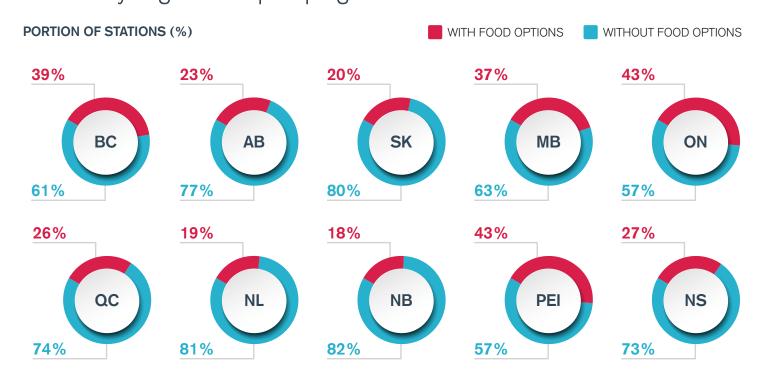




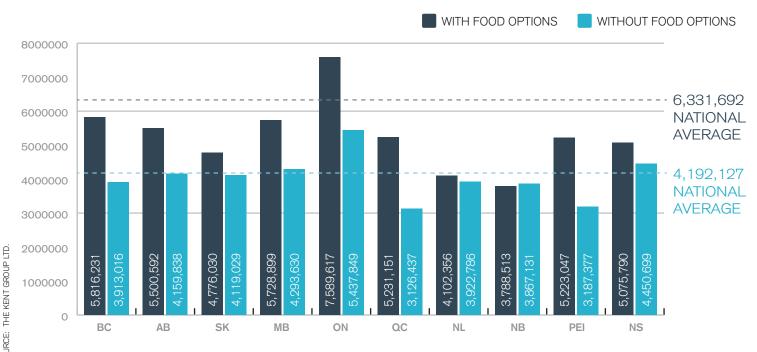
ANNUAL AVERAGE PUMPING VOLUME BASED ON PAYMENT OPTIONS*







ANNUAL AVERAGE PUMPING VOLUME BASED ON FOOD OPTIONS*



*Excludes Costco and Loblaws



Top 10 Categories in Convenience Stores

(exclusive of lottery and gasoline)

SALES INCREASE FROM 2015 TO 2016

SALES DECLINE FROM 2015 TO 2016

2016

2015



\$3,562,585,213 \$3,410,154,743

\$152,430,470



\$228,611,513 \$236,572,924

-\$7,961,411



\$218,843,157 \$214,722,933

\$4,120,224



\$189,498,920

-\$513,321



\$183,270,291 \$188,142,635

-\$4,872,344



\$146,512,886 \$143,240,223

\$3,272,663



\$132,933,441 \$141,238,298

-\$8,304,857



\$124,427,060 \$129,374,018

\$4,946,958



\$106,871,236 \$110,079,030

\$3,207,794



\$80,274,728 \$77,401,259

\$2,873,469



Top 10 Growing Sales Categories in Convenience Stores (exclusive of lottery and gasoline)



2016

2015



\$3,410,154,743

\$152,430,470



\$218,843,157 \$214,722,933 \$4,120,224



\$143,240,223 \$3,272,663



\$26,331,905 \$23,318,263

\$3,013,642



\$80,274,728 \$77,401,259

\$2,873,469



\$18,566,128 \$16,187,289

\$2,378,839



\$27,899,971 \$26,401,263

\$1,498,708



RTD ICED **TEA CANS** \$8,181,835 \$6,939,872 \$1,241,963

CARBONATED WATER \$7,286,397 \$6,599,376

\$687,021

*Dollar increase in the category is due in part to tax increases

\$1,433,877

Top 10 Declining Sales Categories in the Convenience Store Industry (exclusive of lottery and gasoline)

SALES DECREASE FROM 2015 TO 2016

2016

2015



\$132,933,441 \$141,238,298 -\$8,304,857



\$228,611,513 \$236,572,924 -\$7,961,411



\$50,605,160 -\$5,244,041



\$47,325,287 \$52,316,604 -\$4,991,317



\$124,427,060 \$129,374,018 -\$4,946,958



\$183,270,291 \$188,142,635 -\$4,872,344



\$25,026,329 \$29,023,472 -\$3,997,143



\$110,079,030 -\$3,207,794



\$55,378,195 \$58,158,314 -\$2,780,119



\$2,825,595 \$4,857,827 -\$2,032,232

^{*}Includes regular milk, not alternative plant-based milk beverages

^{**}Reading Products – Adult: includes all reading material intended for adults (e.g. sports, home, garden, romance, fashion). This also includes books intended to be read for interest or educational purposes by adults (e.g. novels, do-it-yourself books, dictionaries).



Source: Abacus Data

Pg 6. Convenience Store Locations in Canada

Source: Abacus Data

Pg 7. Convenience Store Sales

Source: Abacus Data

Pg 8. Tax Revenue Collected by Canadian Convenience Stores

Source: Statistics Canada and federal and provincial government finance report

Pg 9. Employment for the Convenience Store industry

Source: Statistics Canada and Abacus Data

Pg 10. Lottery Revenue

Source: Interprovincial Lottery Corporation

Pg 11. Lottery - Commissions Earned by Retailers

Source: Interprovincial Lottery Corporation

Pg 12. **Petroleum**

Source: The Kent Group Ltd.

Pg 13. Canadian Retail Petroleum Prices

Source: The Kent Group Ltd.

Pg 14. Pay at the Pump Analysis

Source: The Kent Group Ltd.

Pg 15. Breakdown of Fuel Stations Offering Food Options

Source: The Kent Group Ltd.

Pg 16. Top 10 Sales Categories in the Convenience Store Industry (exclusive of lottery and gasoline)

Source: Nielsen Canada same store sales data - 5,364 stores across Canada

Pg 17. Top 10 Growing Sales Categories in the Convenience Store Industry (exclusive of lottery and gasoline)

Source: Nielsen Canada same store sales data - 5,364 stores across Canada

Pg 18. Top 10 Declining Sales Categories in the Convenience Store Industry (exclusive of lottery and gasoline)

Source: Nielsen Canada same store sales data - 5,364 stores across Canada



The operations of the CCSA are directed by a national board of senior executives from convenience store retailers and distributors. The 2017-2018 CCSA Board is comprised of the following industry leaders:

Noah Aychental President | Gateway Newstands

Jackie Bellerose Vice President, People Services | Carey Management Inc.

David Button Manager, Retail Division | North Atlantic Petroleum

Marc Goodman Marketing Director, Convenience Retail | Suncor Energy

Manager, Security | Mac's Convenience Stores (Western Canada) **Doug Hartl Peter Kerr** Vice President, Business Development | Sobeys (Distributor Chair) **Mark Kinnin** Vice President, Retail Convenience | MacEwen Petroleum (Treasurer)

Craig Pardy Director, Franchise Operations | Sobeys Convenience and Fuel

Ramona Roberts Owner/Operator | Big Dog Convenience

Bryan Robinson Divisional Vice-President, Petroleum Marketing | Canadian Tire Corporation Ian White Vice President, Strategic Marketing | Parkland Fuel Corporation (Retail Chair)

Victor Vrsnik Government Affairs Manager | 7-Eleven Canada

John Carbone Vice President, Sales and Marketing | Core-Mark International

MISSION OF THE CCSA

The Canadian Convenience Stores Association is a national, not-for-profit association that represents the interests of the convenience retail channel by working with its affiliated Associations to support:

- Independent retailers
- Chain retailers
- Distributors
- Manufacturers and suppliers

Together, we support our member-companies by providing the following services to help them grow their businesses:

- Representing their interests at the federal, provincial and municipal levels of government on issues affecting to their business
- Access to industry data, research and best practices to help them with critical business decisions
- Networking events and business development opportunities with leaders in Canada's convenience retail channel











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