

# CTHEATALOG AGE 1000

## THE ELEVENTH ANNUAL RANKING OF THE TOP 100 U.S. CATALOGERS

(Continued from cover) comparison, 13 of the 49 consumer marketers, or 27%, saw direct sales fall last year.

### The business of b-to-b

No single market segment performed uniformly poorly, or uniformly well, for that matter. Take the computer and IT sector. Six of the 10 computer marketers on this year's list managed to grow sales, including the number-one marketer, Dell Computer Corp.

Acquisitions aided some of the computer resellers. Most, if not all, of PC Connection's (#20) 4% sales growth last year can be credited to the company's April 2002 purchase of MoreDirect, an e-procurement provider that targets large corporations. For instance, PC Connection's total fourth-quarter sales rose 18% in 2002. But if you exclude MoreDirect, year-over-year sales for the quarter actually fell 8%.

Other computer marketers thrived by going after the public sector. Spending by the federal government in particular has not been hurt by the drab economy. Sales to the federal government accounted for \$555.7 million of Dell's \$35.40 billion in revenue; \$86.6 million of

MPC Computers' (#22) estimated \$1.13 billion in sales; and \$62.2 million of CDW Corp.'s (#5) more than \$4.26 billion in revenue.

The industrial supplies market fared somewhat worse. As David Sandler, executive vice president/chief operating officer of MSC Industrial Direct Co. (#29) said in an April earnings call, "It's clear to us that the economic recovery has not yet reached the industrial sector.... Feedback from our customers is that their customers are reducing orders to the bare minimum or putting them on hold." Annual sales for MSC fell 9% last year.

In fact, year-over-year direct sales fell for eight of the 14 catalogers selling electronics components; maintenance, repair, and operating (MRO) supplies; and other industrial products. A 12% drop in sales at its Lab Safety Supply title contributed to the 2% dip in direct sales at W.W. Grainger (#3).

Reduced capital spending in the telecommunications field led to a 5% sales decline at Andrew Corp. (#23); it also led the telecom equipment supplier to lay off 800 workers. Newport Corp. (#88) laid off 187 workers last year and expected to lay off more than 100 this year, as the weak fiber optics and semiconductor markets resulted

in a 43% plummet in sales for the components supplier.

As was the case among the computer catalogers, however, it wasn't all doom and gloom for industrial suppliers. Multititle MRO mailer Interline Brands (#31) grew sales 4%, in part because of a customer relationship management strategy it introduced last year. When implemented among the customer database of its Barnett catalog, response rates rose up to 5%, while average order sizes increased more than 1%.

And despite a flood in October that destroyed its headquarters and central network, Tesco Technologies (#63) managed to increase sales 8%. The marketer of wireless communications supplies credits much of its growth to its affinity-marketing programs, in which it sells cell phones, pagers, and related services directly and "invisibly" to consumers on behalf of manufacturers and local dealers.

Some b-to-b categories seem to be impervious to the economy. Take medical and dental supplies: Revenue at Henry Schein (#9) grew 10%; at Patterson Dental Supply (#15), 22%; at Darby Group Cos. (#30), an estimated 7%.

Laboratory supplies is another sturdy niche. Fisher

Scientific International (#8) increased direct sales 12% last year. VWR International (#14) and Sigma-Aldrich Corp. (#21) had more-modest increases of 1% and 3%.

### Consuming concerns

The consumer marketers on the CATALOG AGE 100 had their own ups and downs. But some of the companies that posted lower sales in 2002 than in 2001 actually performed better last year than the year before.

For instance, sales at multititle apparel and home goods mailer Blair Corp. (#33) dipped 2% last year. But its net income more than doubled, from \$9.3 million in 2001 to \$19.1 million last year.

Similarly, direct sales at apparel cataloger/retailer The Talbots (#67) declined 7%. But the company had cut circulation nearly 13%. In fact, sales per catalog distributed increased 6%. And while jewelry and tabletop items marketer Ross-Simons (#80) saw sales dip nearly 2%, the company had chopped circulation 10%.

Conversely, women's apparel cataloger/retailer The J. Jill Group (#72) grew direct sales 4% last year. That growth can be considered disappointing, however, in

light of the company's 26% circulation hike in 2002, to 78 million catalogs mailed.

For Bear Creek Corp. (#35), a greater emphasis on marketing to corporate customers contributed to its roughly 25% direct sales growth. The parent company of the Harry and David food gifts catalog and Jackson & Perkins horticultural title increased its b-to-b spending approximately 15%. The investment apparently paid off, as the company has said that its b-to-b customers have an appreciably higher lifetime value than their consumer counterparts.

A subtle expansion in its merchandising mix appears to have helped two cataloger/retailers of outdoor sporting goods, Cabela's (#25) and Bass Pro Shops (#74). For sporting goods marketers, the first three quarters, rather than the holiday season, are generally the busiest times of the year. To bolster their fourth-quarter business, both marketers added hunting- and fishing-themed gift items to their lines. Both companies are also opening additional destination superstores, which help create even greater awareness of their brands among outdoors enthusiasts. Last year Cabela's increased its direct sales

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| Rank | Company  | 2002 sales<br>(\$ millions) | 2001 sales<br>(\$ millions) | Market segment                           | Notes  |
|------|--|-----------------------------|-----------------------------|--|--|
| 1    | Dell Computer Corp.<br>Round Rock, TX 512-338-4400                     | \$35,404.0                  | \$31,168.0                  | computers                                | dropping "Computer Corp." to reflect broader offerings |
| 2    | International Business Machines Corp.<br>White Plains, NY 914-642-6209 | \$6,820.8*                  | \$7,342.9*                  | computers                                | catalog and Internet sales only                        |
| 3    | W.W. Grainger<br>Lake Forest, IL 847-793-9030                          | \$4,643.9                   | \$4,754.3                   | industrial supplies                      | 12% sales decline for Lab Safety Supply catalog        |
| 4    | Corporate Express North America<br>Broomfield, CO 303-664-3989         | \$4,630.2                   | \$4,907.7                   | office products                          | sells more than 13,000 products in catalog             |
| 5    | CDW Corp.<br>Vernon Hills, IL 847-465-6000                             | \$4,264.6                   | \$3,961.5                   | computers                                | increased emphasis on sales to public sector           |
| 6    | Office Depot<br>Delray Beach, FL 561-438-4800                          | \$3,913.9                   | \$3,763.0                   | office supplies                          | catalog sales down; growth fueled by e-commerce        |
| 7    | Staples<br>Westborough, MA 508-370-8500                                | \$3,389.6                   | \$3,008.6                   | office supplies                          | Staples, Quill, Medical Arts Press titles              |
| 8    | Fisher Scientific International<br>Burr Ridge, IL 630-655-4373         | \$3,238.0                   | \$2,880.0                   | laboratory supplies                      | 47 straight years of increased sales                   |
| 9    | Henry Schein<br>Melville, NY 516-843-5500                              | \$2,825.0                   | \$2,558.2                   | dental, medical, and veterinary supplies | initiated stock repurchase plan, March 2003            |
| 10   | Boise Office Solutions<br>Itasca, IL 630-773-5000                      | \$2,760.0                   | \$2,700.0                   | office furniture and supplies            | e-commerce accounts for 37% of sales                   |

## M E T H O D O L O G Y

The CATALOG AGE 100 was compiled by Paul Miller and the rest of the magazine staff through public records, data card analysis, and input from financial analysts and sources within the catalog industry.

To put all 100 companies on the same playing field, sales figures are for the calendar years 2002 and 2001. Several companies report their results on a fiscal year different from the calendar year. When the fiscal year varied from the calendar year by more than one month, CATALOG AGE backed out the financial data to obtain calendar-year sales.

To ensure the accuracy of all statistics, CATALOG AGE tried to contact senior executives at each company. Many catalogers couldn't or declined to confirm sales totals; others didn't return phone calls or couldn't be reached. In those cases, or when companies would provide only approximate sales, an asterisk indicates that the figure is an estimate. Based on data card analysis and historical information, CATALOG AGE estimated the mail order and Internet sales from those multichannel firms that don't report them separately. In some cases, the CATALOG AGE figures for 2001 differ from those reported last year, due to updated information.

Wherever possible, sales are net of sales taxes and other

extraordinary fees such as personalization. Because of accounting differences, some figures may include that extra revenue. Many companies that make money on shipping and handling record the fees as sales rather than as a reduction in expenses.

Several computer and industrial supplies mailers, including Dell Computer Corp., Fisher Scientific International, and Corporate Express North America, use direct response or telemarketing to augment or complement their catalogs. The CATALOG AGE 100 sales figures include all direct channels for those marketers because the catalog remains their main sales vehicle. Similarly, sales generated through electronic media are included for both consumer and business-to-business marketers.

For parent companies such as Staples and Mattel, the sales figures listed are for their catalog/Internet divisions only. Likewise, for cataloger/retailers such as The Sharper Image and The J. Jill Group, sales figures are only for the company's direct divisions, unless otherwise indicated.

In two cases—Crosstown Traders and Sears—year-over-year comparisons include the sales of their core catalogs' former owners, Arizona Mail Order and Lands' End.

| Rank | Company  | 2002 sales<br>(\$ millions) | 2001 sales<br>(\$ millions) | Market segment                                       | Notes  |
|------|--|-----------------------------|-----------------------------|--|--|
| 11   | J.C. Penney Co.<br>Plano, TX 972-431-1000                | \$2,613.0                   | \$3,349.0                   | general merchandise                                  | companywide restructuring in full swing            |
| 12   | Sears, Roebuck & Co.<br>Hoffman Estates, IL 847-286-6927 | \$2,112.2                   | \$1,793.0                   | general merchandise                                  | includes Sears, Lands' End catalogs for both years |
| 13   | Micro Warehouse<br>Norwalk, CT 203-899-4000              | \$1,810.0                   | \$1,987.3                   | computers  | 10% decline reflects computer industry downturn    |
| 14   | VWR International<br>West Chester, PA 610-431-1700       | \$1,720.0                   | \$1,700.0                   | laboratory supplies                                  | expanded into Mexico, January 2003                 |
| 15   | Patterson Dental Supply<br>St. Paul, MN 651-686-1600     | \$1,609.0                   | \$1,321.0                   | dental and veterinary supplies                       | investing in automating dental offices             |
| 16   | Systemax<br>Port Washington, NY 516-625-1555             | \$1,552.0                   | \$1,550.0                   | computers, office supplies, and industrial equipment | \$58.9 million net loss in 2002                    |
| 17   | Brylane<br>New York 212-613-9500                         | \$1,540.0*                  | \$1,540.0*                  | apparel and home goods                               | Internet accounts for 20% of sales                 |
| 18   | L.L. Bean<br>Freeport, ME 207-865-4761                   | \$1,400.0                   | \$1,140.0                   | outdoor gear, apparel, and home goods                | better-than-expected holiday sales                 |
| 19   | Spiegel<br>Downers Grove, IL 630-986-8800                | \$1,203.8                   | \$1,546.3                   | general merchandise                                  | filed for Chapter 11, March 2003                   |
| 20   | PC Connection<br>Merrimack, NH 603-423-2000              | \$1,191.0                   | \$1,186.2                   | computers  | bought IT provider MoreDirect, April 2002          |

# CATALOG AGE 100

| Rank | Company  | 2002 sales<br>(\$ millions) | 2001 sales<br>(\$ millions) | Market segment                               | Notes  |
|------|--|-----------------------------|-----------------------------|--|--|
| 21   | Sigma-Aldrich Corp.<br>St. Louis 314-771-5765                  | \$1,150.0                   | \$1,120.0                   | chemicals for research labs                  | produces more than 30 catalogs                     |
| 22   | MPC Computers<br>Nampa, ID 208-893-3434                        | \$1,133.0                   | \$1,100.0                   | computers                                    | changed name from MicronPC, June 2003              |
| 23   | Andrew Corp.<br>Orland Park, IL 708-349-3300                   | \$940.9                     | \$988.9                     | communications equipment                     | opened Mexico manufacturing facility               |
| 24   | Limited Brands<br>Columbus, OH 614-415-8000                    | \$938.7                     | \$869.0                     | women's apparel                              | Victoria's Secret Direct sales only                |
| 25   | Cabela's<br>Sidney, NE 308-254-5505                            | \$900.0                     | \$775.0                     | outdoor sporting goods                       | pursuing full-fledged multichannel strategy        |
| 26   | PC Mall<br>Torrance, CA 310-354-5600                           | \$862.8                     | \$718.1                     | computers                                    | sales to government increased 18%                  |
| 27   | School Specialty<br>Appleton, WI 920-734-2756                  | \$830.0                     | \$764.3                     | b-to-b school supplies                       | entered Canadian market, early 2003                |
| 28   | Williams-Sonoma<br>San Francisco 415-421-7900                  | \$798.2                     | \$735.8                     | home decor and kitchenware                   | launched PBteen (Pottery Barn for teens) catalog   |
| 29   | MSC Industrial Direct Co.<br>Melville, NY 516-812-2000         | \$794.0                     | \$869.2                     | industrial, maintenance, and repair supplies | 53-week year in 2001; 52-week year in 2002         |
| 30   | Darby Group Cos.<br>Westbury, NY 516-683-1800                  | \$695.0                     | \$650.0                     | dental, medical, and veterinary supplies     | distributes more than 40,000 products              |
| 31   | Interline Brands<br>Moorestown, NJ 609-439-1222                | \$635.0                     | \$610.0                     | maintenance, repair, and operating supplies  | includes Wilmar, Barnett, Sexauer, Trayco catalogs |
| 32   | Cintas Corp.<br>Cincinnati 513-573-421                         | \$574.7                     | \$533.6                     | uniforms                                     | rising unemployment slows sales growth             |
| 33   | Blair Corp.<br>Warren, PA 814-723-3600                         | \$568.5                     | \$580.7                     | apparel and home goods                       | online gross demand up 64% to \$57.6 million       |
| 34   | New England Business Service (NEBS)<br>Groton, MA 978-448-6111 | \$547.9                     | \$569.5                     | office and warehouse supplies                | bought Safeguard Business Systems, June 2003       |
| 35   | Bear Creek Corp.<br>Medford, OR 541-864-2121                   | \$500.0-plus                | \$400.0                     | food, gifts, and horticultural products      | Harry and David, Jackson & Perkins titles          |
| 36   | Aramark Corp.<br>Philadelphia 215-238-3000                     | \$490.0                     | \$510.0                     | uniforms and public safety equipment         | WearGuard, Galls titles                            |
| 37   | Broder Bros.<br>Plymouth, MI 734-454-4800                      | \$480.0                     | \$440.0                     | wholesale apparel                            | operates 14 distribution centers                   |
| 37   | OfficeMax<br>Cleveland 216-471-3441                            | \$480.0                     | \$463.0                     | office products                              | catalog/Web sales only                             |
| 39   | Premier Farnell<br>Chicago 773-784-5100                        | \$476.7                     | \$534.4                     | industrial electronics                       | Newark InOne, MCM titles                           |
| 40   | Getty Images<br>Seattle 206-268-2000                           | \$463.0                     | \$451.0                     | digital and stock images                     | includes EyeWire, Artville, PhotoDisc catalogs     |

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roughly 16%; Bass Pro Shops, an estimated 5%. Another marketer of outdoor sporting gear, The Sportsman's Guide (#81), also increased its sales, by 6%. The cataloger's Buyer's Club is responsible for at least some of that growth. Introduced in fall 2000, the club now has approximately 300,000 members, who pay \$29.99 a year to receive discounts and special offers. Sportsman's Guide executives have said that members spend two to three times as much with the company as nonmembers. Sportsman's Guide has also returned to its value-pricing roots, which has no doubt helped the company during this recession.

Athletic shoes marketer Foot Locker (#55) attributes much of its 7% increase in catalog and Web sales to its marketing alliances. Like Tesco Technologies, Foot Locker manages the catalog and e-commerce businesses of companies such as the National Football League, although the majority of its direct business comes from its Eastbay catalog.

Some catalogers increased their sales the old-fashioned way: via acquisitions. Alloy (#86) boasted an impressive 35% gain in catalog and online product sales largely because of its September 2001 acquisition of BMX supplies title Dan's Comp and its March 2002 purchase of teen girl's apparel book Girlfriends L.A. Alloy's December 2002 acquisition of Old Glory Boutique Distributing will give the catalog a similar bump this year. Meanwhile, new entrant to the list 1-800-Flowers.com (#82) increased its sales significantly by acquiring The Popcorn Factory in May 2002.

#### Hello and goodbye

1-800-Flowers.com isn't the only newbie to the CATALOG AGE 100. Athletic gear cataloger Road Runner Sports (#98) made the cut, having increased sales nearly 18%. Last year's successful spin-off of a book targeting women, Activa, contributed to the company's impressive performance.

Cataloger/retailer Crate & Barrel (#100) returned to the ranking this year thanks to a roughly 5% growth in catalog and Web sales. The marketer of home furnishings and accessories benefited from the continuing "nesting" trend as well as by offering affordable decor alternatives to cost-conscious but still style-conscious consumers.

So who's gone? MRO distributor Wesco International, #94 on last year's list, just missed the cut. Its catalog sales slid about 11%, to approximately \$125 million. Don't cry too many tears for the company, though: Its total sales are \$3.33 billion.

With sales of \$120 million in 2002, gifts and home decor cataloger Miles Kimball fell off the list as well. Last year's #95 saw sales fall 13%; the company, which was acquired by Blyth earlier this year, shut its Exposures Home title in late 2001.

Likewise, its decision to divest itself of its flagship Mark, Fore & Strike catalog title last year led to a decline in year-over-year sales for apparel, gifts and home goods mailer The Mark Group. The company was ranked #98 in last year's CATALOG AGE 100, with sales of \$125 million.—*Sherry Chiger*

## Who Sells What

The CATALOG AGE 100 is dominated by several product categories: apparel, gifts, home goods, computer-related products, general merchandise, sporting goods, and industrial/maintenance, repair, and operating supplies. Below is a breakdown by product category of companies ranked in this year's chart. Because some of the catalogers listed sell products in multiple categories, the total adds up to more than 100:

|                               |    |
|-------------------------------|----|
| Apparel/footwear:             | 24 |
| Home-related:                 | 11 |
| Computer-related:             | 10 |
| Gifts/jewelry:                | 9  |
| Industrial supplies/MRO:      | 8  |
| Office products:              | 6  |
| Electrical components:        | 5  |
| Food:                         | 5  |
| Medical/dental supplies:      | 5  |
| Sporting goods:               | 5  |
| General merchandise:          | 4  |
| Safety/security products:     | 4  |
| Consumer electronics:         | 3  |
| Hardware:                     | 3  |
| Laboratory supplies:          | 3  |
| Personal healthcare/vitamins: | 3  |
| Auto/motorcycle supplies:     | 2  |
| Business apparel:             | 2  |
| Children's products:          | 2  |
| Educational supplies:         | 2  |
| Communications equipment:     | 1  |
| Digital and stock images:     | 1  |
| Farming supplies:             | 1  |
| Horticultural products:       | 1  |
| Hotel/restaurant supplies:    | 1  |
| Luggage:                      | 1  |
| Musical equipment:            | 1  |
| Pet supplies:                 | 1  |
| Stationery:                   | 1  |

## Tallying It Up

Total 2002 direct sales of the CATALOG AGE 100: **\$118.39 billion (\$118,385.0 million)**

Total 2001 direct sales of the CATALOG AGE 100: **\$113.21 billion (\$113,206.4 million)**

Percentage increase from 2002 to 2001: **4.6%**

(Chart continues on page 52)

| Rank | Company  | 2002 sales<br>(\$ millions) | 2001 sales<br>(\$ millions) | Market segment                        | Notes   |
|------|--|-----------------------------|-----------------------------|---------------------------------------|---|
| 41   | Neiman Marcus Group<br>Dallas 214-743-7600                   | \$460.0                     | \$421.2                     | apparel, home decor, and cookware     | testing catalog showroom departments in some stores   |
| 42   | Hanover Direct<br>Edgewater, NJ 201-863-7300                 | \$457.6                     | \$532.2                     | apparel and home goods                | 14% revenue decrease on a 9% circulation cut          |
| 43   | Cornerstone Brands<br>Westchester, OH 573-603-1400           | \$450.0-plus                | \$500.0                     | home decor and apparel                | Frontgate, TravelSmith, Ballard Designs, other titles |
| 43   | Oriental Trading Co.<br>Omaha, NE 402-596-1200               | \$450.0-plus                | \$400.0-plus                | gifts and novelties                   | double-digit sales growth on comparable circ growth   |
| 45   | Home Depot<br>Fullerton, CA 714-449-5699                     | \$434.4                     | \$398.5                     | building and maintenance supplies     | total company sales \$58.2 billion                    |
| 46   | McMaster-Carr Supply Co.<br>Elmhurst, IL 630-833-0300        | \$415.0                     | \$415.0-plus                | maintenance supplies                  | offers more than 400,000 products                     |
| 47   | Zones<br>Renton, WA 425-430-3000                             | \$414.6                     | \$541.0                     | computers                             | bought Corporate PC Source, April 2003                |
| 48   | ABC Distributing<br>North Miami, FL 305-944-6900             | \$410.0                     | \$410.0-plus                | gifts, premiums, and sales promotions | sells wholesale to businesses and consumers           |
| 49   | Crosstown Traders<br>Tucson, AZ 520-745-4500                 | \$400.0                     | \$352.0                     | apparel, food                         | the Arizona Mail Order, Fig's titles                  |
| 49   | The Swiss Colony<br>Monroe, WI 608-328-8400                  | \$400.0                     | \$380.0                     | food, gifts, and apparel              | includes Midnight Velvet, Seventh Avenue titles       |
| 51   | Coldwater Creek<br>Sandpoint, ID 208-263-2266                | \$388.8                     | \$434.5                     | women's apparel                       | changed fiscal-year dates to end 2/1/03               |
| 52   | Mattel<br>El Segundo, CA 310-252-2000                        | \$380.0                     | \$370.0                     | toys and collectibles                 | American Girl, Barbie, Fisher-Price catalogs          |
| 53   | American Hotel Register Co.<br>Vernon Hills, IL 800-323-5686 | \$375.0                     | \$350.0                     | hotel operating supplies              | does business in more than 50 countries               |
| 54   | Digi-Key Corp.<br>Thief River Falls, MN 218-681-6674         | \$370.0-plus                | \$356.3                     | electronics components                | all orders shipped same day                           |
| 55   | Foot Locker<br>New York 212-720-3700                         | \$350.0                     | \$326.0                     | athletic footwear                     | Eastbay, Final Score titles                           |
| 56   | J. Crew Group<br>New York 212-209-2529                       | \$344.9                     | \$350.0                     | apparel                               | hired former Gap whiz Mickey Drexler to revamp        |
| 57   | Omaha Steaks<br>Omaha, NE 402-331-1010                       | \$325.0                     | \$302.0                     | food                                  | double-digit growth in holiday 2002                   |
| 58   | K+K America<br>Milwaukee 414-443-1700                        | \$320.0                     | \$320.0                     | industrial supplies                   | sales flat despite cost cuts                          |
| 59   | Starcrest of California<br>Perris, CA 909-943-2011           | \$312.0                     | \$281.9                     | apparel and home goods                | catalogs include Traditions, Signatures, Gavilans     |
| 60   | Airgas<br>Radnor, PA 610-687-5253                            | \$301.0                     | \$303.0                     | safety tools and equipment            | Airgas Safety, Rutland Tool catalogs                  |

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| Rank | Company  | 2002 sales<br>(\$ millions) | 2001 sales<br>(\$ millions) | Market segment                     | Notes  |
|------|--|-----------------------------|-----------------------------|------------------------------------|--|
| 61   | Northern Tool & Equipment Co.<br>Burnsville, MN 612-894-9510 | \$300.0*                    | \$300.0*                    | industrial and consumer tools      | hybrid serves retail, do-it-yourself markets     |
| 62   | Nordstrom<br>Seattle 206-628-2111                            | \$270.0                     | \$277.3                     | apparel                            | catalog sales decline offset by Web sales gains  |
| 63   | Tessco Technologies<br>Hunt Valley, MD 410-229-1000          | \$266.5                     | \$246.9                     | wireless communications supplies   | soon to embark on stock option repurchasing plan |
| 64   | Black Box Corp.<br>Lawrence, PA 724-746-5500                 | \$260.5                     | \$350.3                     | computer networking equipment      | continuous focus on profitability                |
| 65   | Global Motorsport Group<br>Morgan Hill, CA 408-778-0500      | \$250.0                     | \$200.0*                    | motorcycle parts                   | Harley-Davidson aftermarket products             |
| 65   | Taylor Corp.<br>North Mankato, MN 507-625-2828               | \$250.0*                    | \$250.0*                    | stationery and specialty papers    | includes PaperDirect, Current catalogs           |
| 67   | Lillian Vernon Corp.<br>Rye, NY 914-925-1300                 | \$247.4                     | \$258.7                     | gifts and home goods               | sold to investment/media consortium in July      |
| 67   | The Talbots<br>Hingham, MA 781-749-7600                      | \$247.4                     | \$266.5                     | apparel                            | launched men's catalog in fourth quarter 2002    |
| 69   | Norm Thompson Outfitters<br>Portland, OR 503-614-4446        | \$232.0                     | \$227.0                     | apparel, gifts and home decor      | includes Solutions, Early Winters titles         |
| 70   | Dr. Leonard's Healthcare Corp.<br>Edison, NJ 732-572-0900    | \$225.0                     | \$240.0                     | healthcare products and gifts      | Dr. Leonard's, Carol Wright Gifts catalogs       |
| 71   | Kennametal<br>Latrobe, PA 724-539-5000                       | \$221.0                     | \$265.0                     | metalcutting supplies              | JLK Industrial Supplies only                     |
| 72   | The J. Jill Group<br>Quincy, MA 781-740-2718                 | \$220.6                     | \$212.2                     | women's apparel                    | retail sales jumped 68% in 2002                  |
| 73   | Sharper Image Corp.<br>San Francisco 415-445-6000            | \$210.9                     | \$151.1                     | gadgets and gifts                  | includes catalog, online, and Web auction sales  |
| 74   | Bass Pro Shops<br>Springfield, MO 417-873-5000               | \$210.0*                    | \$200.0*                    | outdoor sporting goods             | still owned by founder John Morris               |
| 75   | Guitar Center<br>Austin, TX 512-837-8810                     | \$208.7                     | \$168.5                     | musical equipment                  | Musician's Friend sales only                     |
| 76   | AcuSport<br>Bellefontaine, OH 937-593-7010                   | \$200.0*                    | \$200.0*                    | hunting supplies                   | AcuSport direct sales only                       |
| 76   | Sara Lee Corp.<br>Winston-Salem, NC 336-519-8360             | \$200.0*                    | \$200.0*                    | hosiery, luggage, and food         | Just My Size catalog sales strong                |
| 78   | NBTY<br>Bohemia, NY 516-244-2010                             | \$198.0                     | \$176.5                     | vitamins                           | Puritan's Pride direct sales only                |
| 79   | Crutchfield Corp.<br>Charlottesville, VA 804-817-1000        | \$192.2                     | \$191.6                     | consumer electronics               | rapid growth in online auto accessories          |
| 80   | Ross-Simons<br>Cranston, RI 401-463-3100                     | \$188.0                     | \$191.0                     | jewelry, gifts, and tabletop items | reduced catalog circulation by 10% in 2002       |

## Getting and Spending

Major acquisitions involving CATALOG AGE 100 companies in 2002...

| Buyer                                 | Acquisition                         | Month   |
|---------------------------------------|-------------------------------------|---------|
| Newport Corp.                         | Micro Robotics Systems              | Feb.    |
| Alloy                                 | Girffriends L.A.                    | March   |
| PC Mall                               | Pacific Business Systems            | March   |
| Brady Corp.                           | Temtec                              | April   |
| Cintas Corp.                          | selected Angelica Corp. assets      | April   |
| PC Connection                         | MoreDirect                          | April   |
| 1-800-Flowers.com                     | The Popcorn Factory                 | May     |
| Cintas Corp.                          | Omni Services                       | May     |
| Cortec Group                          | Dr. Leonard's Healthcare Corp.      | May     |
| Sears, Roebuck & Co.                  | Lands' End                          | May     |
| FAC Acquisitions                      | Fingerhut                           | June    |
| Riverside Co.                         | J.C. Whitney & Co.                  | June    |
| Black Box Corp.                       | EDC Communications Ireland          | July    |
| Black Box Corp.                       | Société d'Installation Reseaux      | July    |
| Patterson Dental Co.                  | Distribution Quebec DentairDentaire | July    |
| PC Mall                               | Wareforce                           | July    |
| School Specialty                      | ABC School Specialty                | July    |
| Staples                               | Medical Arts Press                  | July    |
| Doctors Foster & Smith                | Hornbeck's                          | Aug.    |
| Staples                               | Guilbert                            | July    |
| Doctors Foster & Smith                | eTropicals.com                      | Sept.   |
| Crosstown Traders (JPMorgan Partners) | Arizona Mail Order, Figi's          | Nov.    |
| Fisher Scientific International       | Mimotopes                           | Nov.    |
| Fisher Scientific International       | Maybridge Chemical Holdings         | Nov.    |
| Airgas                                | Welding Metals                      | Dec.    |
| Alloy                                 | Old Glory Boutique Distributing     | Dec.    |
| ...and this year so far               |                                     |         |
| Brady Corp.                           | Tiscor                              | Jan.    |
| Black Box Corp.                       | Rowe Structured Cabling             | Feb.    |
| School Specialty                      | Sunburst Video                      | Feb.    |
| W.W. Grainger                         | Gempler's                           | April   |
| Zones                                 | Corporate PC Source                 | April   |
| Blyth                                 | Miles Kimball                       | May     |
| Brady Corp.                           | Etimark GmbH                        | May     |
| Henry Schein                          | Hager Dental GmbH                   | May     |
| Aristotle Corp.                       | Haan Crafts Corp.                   | June    |
| Henry Schein                          | Colonial Surgical                   | June    |
| NEBS                                  | Safeguard Business Systems          | June    |
| School Specialty                      | Select Agendas                      | June    |
| Andrew Corp.                          | Allen Telecom                       | pending |
| NBTY                                  | Rexall Sundown                      | pending |
| Ripplewood Holdings/                  | Lillian Vernon Corp.                | pending |
| ZelnickMedia                          |                                     |         |
| Taylor Corp.                          | G. Neil Cos.                        | pending |

| Rank | Company   | 2002 sales<br>(\$ millions) | 2001 sales<br>(\$ millions) | Market segment                              | Notes  |
|------|---|-----------------------------|-----------------------------|---|--|
| 81   | The Sportsman's Guide<br>South St. Paul, MN 651-451-3030      | \$180.3                     | \$169.7                     | outdoor sporting goods                      | mailed 46 million catalogs in 2002                     |
| 82   | 1-800-Flowers.com<br>Westbury, NY 516-237-6000                | \$180.0-plus*               | \$120.0-plus*               | gifts, home decor, and toys                 | includes Plow & Hearth, HearthSong catalogs            |
| 83   | Tiffany & Co.<br>New York 212-755-8000                        | \$179.2                     | \$160.7                     | jewelry, gifts, and tabletop items          | mailed 24 million catalogs in 2002                     |
| 84   | J&R Music World<br>New York 212-238-9000                      | \$175.0*                    | \$165.0*                    | consumer electronics                        | total sales, including store, of \$292 million         |
| 85   | J.C. Whitney & Co.<br>Chicago 312-431-6000                    | \$173.4*                    | \$170.0*                    | auto supplies                               | 2%-3% annual sales growth                              |
| 86   | Alloy<br>New York 212-244-4307                                | \$167.5                     | \$124.0                     | teen apparel and accessories                | excludes promotions, marketing revenue                 |
| 87   | Aristotle Corp.<br>Stamford, CT 203-358-8000                  | \$165.0                     | \$162.0                     | farm and educational supplies               | includes Nasco, Summit Learning                        |
| 88   | Newport Corp.<br>Irvine, CA 949-863-3144                      | \$164.0                     | \$290.0                     | manufacturing and engineering components    | significant cost cuts, layoffs in 2002                 |
| 89   | Brady Corp.<br>Milwaukee 414-358-6600                         | \$160.4                     | \$156.2                     | safety and facility identification products | laying off 10% of workforce this year                  |
| 90   | Allied Electronics<br>Fort Worth, TX 817-595-3500             | \$158.0                     | \$158.0                     | electronics components                      | used photography, color in in catalog for first time   |
| 91   | Doctors Foster & Smith<br>Rhinelander, WI 715-369-3305        | \$157.0                     | \$150.0                     | pet supplies                                | bought Hornbeck's nuts and seeds catalog assets        |
| 92   | Knight's Direct<br>St. Louis 314-993-1516                     | \$155.0                     | \$166.8                     | apparel, home decor                         | Home Decorators Collection, Soft Surroundings catalogs |
| 93   | DMSI (Direct Marketing Services Inc.)<br>Chicago 312-328-7412 | \$150.0                     | \$125.0                     | home furnishings                            | includes HomeVisions, Sears-licensed catalogs          |
| 93   | Harriet Carter Gifts<br>Montgomeryville, PA 215-361-5100      | \$150.0*                    | \$150.0*                    | gifts and housewares                        | family-run business since 1958                         |
| 93   | The Orvis Co.<br>Manchester, VT 802-362-3622                  | \$150.0*                    | \$150.0*                    | outdoor sporting goods, apparel, and gifts  | Web sales up   |
| 96   | Bosch Security Systems Corp.<br>Orlando, FL 716-223-4060      | \$140.0-plus*               | \$140.0-plus*               | security equipment                          | Detection Systems direct sales only                    |
| 97   | Moore Medical Corp.<br>New Britain, CT 860-826-3600           | \$137.8                     | \$132.8                     | medical supplies                            | returned to profitability in 2002                      |
| 98   | Federated Department Stores<br>New York 212-494-1602          | \$130.0                     | \$130.0                     | women's apparel and home decor              | Bloomingdale's catalog/ Web sales only                 |
| 98   | Road Runner Sports<br>San Diego 858-974-4201                  | \$130.0                     | \$110.5                     | running shoes and fitness products          | rolled out women's fitness spin-off, 2002              |
| 100  | Crate & Barrel<br>Northbrook, IL 847-272-2888                 | \$126.5*                    | \$120.0*                    | home decor                                  | total company sales estimated at \$744 million         |

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| Catalog                               | Rank |
|---------------------------------------|------|
| 1-800-Flowers.com                     | 82   |
| ABC Distributing                      | 48   |
| AcuSport                              | 76   |
| Airgas                                | 60   |
| Allied Electronics                    | 90   |
| Alloy                                 | 86   |
| American Hotel Register Co.           | 53   |
| Andrew Corp.                          | 23   |
| Aramark Corp.                         | 36   |
| Aristotle Corp.                       | 87   |
| Bass Pro Shops                        | 74   |
| Bear Creek Corp.                      | 35   |
| Black Box Corp.                       | 64   |
| Blair Corp.                           | 33   |
| Boise Office Solutions                | 10   |
| Bosch Security Systems Corp.          | 96   |
| Brady Corp.                           | 89   |
| Broder Bros.                          | 37   |
| Brylcre                               | 17   |
| Cabela's                              | 25   |
| CDW Corp.                             | 5    |
| Cintas Corp.                          | 32   |
| Coldwater Creek                       | 51   |
| Cornerstone Brands                    | 43   |
| Corporate Express North America       | 4    |
| Crate & Barrel                        | 100  |
| Crosstown Traders                     | 49   |
| Crutchfield Corp.                     | 79   |
| Darby Group Cos.                      | 30   |
| Dell Computer Corp.                   | 1    |
| Digi-Key Corp.                        | 54   |
| DMSI                                  | 93   |
| Doctors Foster & Smith                | 91   |
| Dr. Leonard's Healthcare Corp.        | 70   |
| Federated Department Stores           | 98   |
| Fisher Scientific International       | 8    |
| Foot Locker                           | 55   |
| Getty Images                          | 40   |
| Global Motorsport Group               | 65   |
| Guitar Center                         | 75   |
| Harriet Carter Gifts                  | 93   |
| Hanover Direct                        | 42   |
| Henry Schein                          | 9    |
| Home Depot                            | 45   |
| Interline Brands                      | 31   |
| International Business Machines Corp. | 2    |
| J&R Music World                       | 84   |
| J.C. Penney Co.                       | 11   |
| J. Crew Group                         | 56   |
| J.C. Whitney & Co.                    | 85   |
| The J. Jill Group                     | 72   |
| K+K America                           | 58   |
| Kennametal                            | 71   |
| Knight's Direct                       | 92   |
| Lillian Vernon Corp.                  | 67   |
| Limited Brands                        | 24   |
| L.L. Bean                             | 18   |
| Mattel                                | 52   |
| McMaster-Carr Supply Co.              | 46   |
| Micro Warehouse                       | 13   |
| Moore Medical Corp.                   | 97   |
| MPC Computers                         | 22   |
| MSC Industrial Direct Co.             | 29   |
| NBTY                                  | 78   |
| Neiman Marcus Group                   | 41   |
| New England Business Service          | 34   |
| Newport Corp.                         | 88   |
| Nordstrom                             | 62   |
| Norm Thompson Outfitters              | 69   |
| Northern Tool & Equipment Co.         | 61   |
| Office Depot                          | 6    |
| OfficeMax                             | 37   |
| Omaha Steaks                          | 57   |
| Oriental Trading Co.                  | 43   |
| Orvis                                 | 93   |
| Patterson Dental Supply               | 15   |
| PC Connection                         | 20   |
| PC Mall                               | 26   |
| Premier Farnell                       | 39   |
| Road Runner Sports                    | 98   |
| Ross-Simons                           | 80   |
| Sara Lee Corp.                        | 76   |
| School Specialty                      | 27   |
| Sears, Roebuck & Co.                  | 12   |
| Sharper Image Corp.                   | 73   |
| Sigma-Aldrich Corp.                   | 21   |
| Spiegel                               | 19   |
| The Sportsman's Guide                 | 81   |
| Staples                               | 7    |
| Starcrest of California               | 59   |
| The Swiss Colony                      | 49   |
| Systemax                              | 16   |
| The Talbots                           | 67   |
| Taylor Corp.                          | 65   |
| Tessco Technologies                   | 63   |
| Tiffany & Co.                         | 83   |
| VWR International                     | 14   |
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| W.W. Grainger                         | 3    |
| Zones                                 | 47   |