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Store In Manassas**

Food World

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Vol. 79 No. 6

MARKET STUDY ISSUE

June 2023

TAKING STOCK

by Jeff Metzger



Inflation Helps Retailers Post Strong Comps; Many Fear That Darker Days Are Looming

As one retail executive said when I told him what his company's share of the Baltimore-Washington was, "It's a good thing that your 12-month measuring period ended in March, because the next 12 months are going to look much different."

He's right, in the three months since our annual measuring period concluded (March 31), sales have consistently weakened, and most retailers fear the worst is yet to come.

"As difficult as the last three years have been on humanity, a period of great sacrifice for our associates and the struggles we've all endured with supply chain disruption, we have been very fortunate that sales have re-

See **TAKING STOCK** on page 6

Giant, WM, CVS, Food Lion, Albertsons Remain Leaders; Wawa, Costco, BJ's Make Strides

Near Record Inflation Boosts Revenues To All-Time Highs

Mid-Atlantic retailers generally continued to produce record sales as inflation created strong economic tailwinds which have only slightly abated in the past three months. In fact, beginning in 2020 with the impact of the pandemic and then continuing in 2021 with a combination of the remaining sales effects of COVID-19 and the beginning of rampant food inflation, many retailers had predicted the period from April 1, 2022 to March 2023 would see a slowing of economic growth. And while there were many other non-grocery industries that experienced

flat or slightly negative sales, retail food was not one of them.

For the entire year, we estimated that overall retail prices increased about 11 percent, and although the challenging supply chain disruption of 2020 and 2021 improved, manufacturers continued to increase their wholesale pricing in a move that several retailers termed exorbitant. In fact, total retail sales in the 89-county Mid-Atlantic market increased from \$57.1 billion to \$60.6 billion over the 12-month measuring period, the second highest growth rate since *Food World* has published its annual sales and share of market breakouts (only 2020's inflation rate was higher).

Here's a breakdown of the top 10 retailers in the Mid-Atlantic market.

Giant Food, the market leader

since *Food World's* first retail market study was published in 1979, remained atop the leaderboard, amassing sales of \$6.38 billion at its 161 stores, one more than last year. The Landover, MD brand of Ahold Delhaize USA (ADUSA) continued to dominate in its core Baltimore-Washington market and also invested heavily over the past 12 months in its digital platform as it prioritizes its focus on omnichannel retailing. Earlier this year, Giant Food opened a second large digital fulfillment center in Manassas, VA.

Continuing to make gains in comp store sales was Walmart. The planet's largest retailer (and grocery merchant) remained in second place among all operators in the \$60.6 billion market by once

See **MARKET STUDY** on page 104



THE INTERNATIONAL DAIRY DELI BAKERY ASSOCIATION (IDDBA) held its flagship event, IDDBA 2023, in Anaheim June 4-6. Among those attending were (l-r) Patrick Considine, LaClare Creamery; Amy Loss, Bill Bruachle and Katie Niles, Wegmans; and Alex Coenen, LaClare Creamery. Additional photos are on page 74.

Perkins Shifts From Malvern to Boise To Head SpinCo

Lofland As Pres., Habben As SVP Head New Albertsons Mgmt. Team

After Albertsons moved Mid-Atlantic division president Jim Perkins to corporate headquarters in Boise, ID last month to oversee SpinCo, Tom Lofland was elevated to division president and Albertsons executive Jay Habben has been named senior VP-merchandising and marketing for the Malvern, PA-based division.

Lofland first joined Albertsons in 1990 and has worked in multiple roles in several locations for the large retailer. After completing Albertsons' training program, he began as a grocery manager in Seminole, FL. Over the years, he

See **ALBERTSONS** on page 38

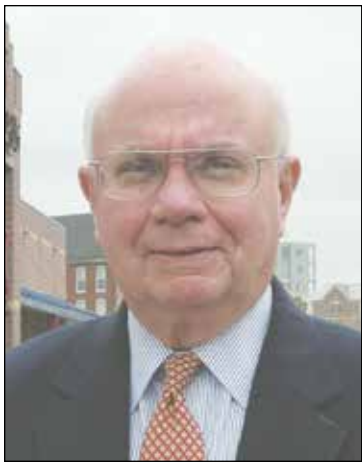
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Dick Bestany, Co-Founder of Food World, Food Trade News Passes Away At Age 83

Dick Bestany, co-founder of Best-Met Publishing and former president of Food World and Food Trade News passed away at the age of 83 at his home in Ellicott City, MD on May 22.

Born in Fitchburg, MA, Bestany spent much of his childhood in nearby Westminister, MA before attending high school in the Boston suburb of Winchester. He graduated from Winchester High School

in 1957 and attended Boston University's School of Public Relations and Communication (now College of Communication), graduating in 1961.

During his college years, Bestany served as an intern for Boston-based The Gillette Co. and after graduating he joined the company on a full-time basis, ultimately serving as the editor of Gillette's in-house newsletter, The Blade.

He left Gillette in 1969 to join Boston television station WSBK (Channel 38) to gain more experience in sales. A year later, he moved to become advertising manager of the The Griffin Report, the regional trade paper that covered the food industry in New England. Within a year, he was promoted to VP-advertising for the company, delivering record ad revenue for the Boston-based trade newspaper.

In May 1978, Bestany and Jeff Metzger, who was serving as editor of The Griffin Report, had an opportunity to acquire a struggling food trade newspaper, Food World, in the Baltimore-Washington area. Using some of the knowledge they gained from their years in Boston, they radically changed the style (and perception) of Food World, which became profitable in its first year of business.

Later in 1978, they received a phone call from the owner of another regional food industry trade paper, Food Trade News, which was based in Philadelphia. Irv Borowsky said that he'd like to sell his only newspaper (the rest of his properties were glossy magazines) and that after studying what we'd accomplished with Food World, he'd like to sell Food Trade News to Bestany and Metzger.

"Irv, we're flattered," Bestany said, "but we just paid off our first loan and we need to take a breather for a while." Borowsky wouldn't take no for an answer and personally arranged financing for the deal through his bank.

For the next 29 years, Bestany and Metzger remained partners and friends and helped grow the business by adding a foodservice publication (Mid-Atlantic Foodservice News), an advertising and price verification service (Food World Information Services) and an annual industry reference book (Grocery Industry Directory) which began publishing in 1995.

Bestany retired in 2007 and became Chairman Emeritus of the company.

"There was nobody I've ever met after 50 years covering the food industry who enjoyed the business more than Dick," said Metzger. "Business and entertainment were seamlessly woven together. But when it came time to ask for the order, Dick was a master. People genuinely enjoyed him as a person and his role as a key information cog in the business also gave him tremendous credibility."

Dick Bestany leaves his wife of 59 years Kathy; daughter Cyndi and son Rick as well as three grandchildren.



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*Source: IRI MULO+C L12WK ending 4.23.23, **Source: IRI Panel Total US All Outlets L12WK ending 4.23.23



Terri's Take

By Terri Maloney

Welcome to “Terri’s Take” and thank you to all the readers who wrote in with ideas for naming this column. As I wrote last month, I welcome input from readers about interesting bits of news that might not make it to the front page or into “Taking Stock,” but would interest our readers anyway. So, please write or call me at terri@foodtradenews.com or 410.428.1891.

I also wrote last month about wanting to create something similar to **Dick Bestany’s** “In & Around *Food World*” column, which he wrote from 1978 until 2016. Sadly, as you’ve no doubt read already, Dick passed away last month, just a few days before what would have been his 84th birthday.

For those of you who knew Dick personally, you’ll understand what a loss this is. For those of you who joined the industry after Dick retired and didn’t have the pleasure of getting to know him, let me tell you a little bit about him and how much he meant to me personally.

To say Dick was gregarious

would be an understatement. He brightened any room he entered (barroom, restaurant, broker office or buying office – it didn’t matter). He was generous to a fault. He was a kind and loving family man – husband, dad and grandfather. And he was a master salesman – just ask those Eskimos who bought ice from him – more than once!

I came to work with Dick and Jeff during a time when I was “between jobs” – which really meant, trying to figure out what I was going to do with my life, having just moved back to Maryland. Who knew where that would lead me. Long story short, I got a part-time job at Best-Met doing some data entry, and slowly got to know the business and found myself doing more and more. Eventually, I ended up managing a division called Food World Information Services, which has since ceased to exist. That position technically involved selling the service, which was not anything I felt cut out to do. So, with Dick as the salesman and me handling the rest, we grew a pretty nice business. Dick would get the sales appointment, I would explain how the (usually) broker could benefit from using our products, and Dick would ask for the order. Along the way, I learned a lot from Dick about everything, especially how to talk to people and to socialize. Before working with him, I wasn’t too good at small talk, or engaging with lots of people I didn’t know well. But, with Dick as my teacher during sales calls, conventions, cocktail parties and the like, I learned to be pretty good at both. (I also ate out at some great restaurants – Boccaccio, The Prime Rib, 1789 and more – the man knew how to entertain customers, and I was happy to go along for the ride!)

Dick was also very kind and

generous to my family, especially my brother **Eddie**, who did lots of parttime work for Best-Met while working his way through college, and my mom **Donna** and sister **Kathleen**. (O’s tickets were enjoyed by many people through Dick and Jeff’s largesse, and Eddie was often a beneficiary.)

Dick was a wonderful influence on my life in many ways, and I will never forget him.

Speaking of generosity, Giant Food recently donated \$100,700 to the American Farmland Trust’s (AFT) Brighter Future Fund which supports local farmers located throughout the greater Washington, DC, Maryland and Virginia region through a round-up-at-the-checkout campaign in April. The donation will be allocated to help local farmers improve farm viability, access, transfer or permanently protect farmland, or adopt regenerative agricultural practices.

Giant’s donation will support local farmers throughout the region with grants up to \$10,000 per project to help farmers. Last year, the same program supported some interesting farms and practices. Sisters of the Soil Community Farm, part of a 10-acre Urban Farm Incubator at Watkins Regional Park in Upper Marlboro, MD where a group of three farmers manage half of an acre and produce vegetables, fruits, nuts and other herbs received a donation, as did Dodo Farms is, which is owned by husband-and-wife farmers from Nigeria. That Montgomery County, MD-based farm is used to grow a variety of vegetables.

So did La Botanica which, while operating on less than an acre in Fairfax, VA, produces naturally grown no-till flowers, Indigo and fresh Puerto Rican produce.

“As a business dedicated to

supporting its local region, we’re proud to know this money will be used toward increasing the resiliency of farms within our communities,” **Diane Couchman**, VP of category management, non-perishables at Giant Food. “Partnering with our vendors like Tillamook and non-profit organizations such as AFT, allows us to help the hard-working farmers that supply our area with fresh, locally grown produce and flowers.”

AFT’s Brighter Future Fund launched in 2020 through a partnership with Tillamook County Creamery Association (TCCA), a farmer-owned co-op with one of the fastest growing dairy brands (Tillamook) in the country. The Fund was created to help farmers across the country start, grow and sustain farms in the face of challenges, including COVID-19, severe weather and shifting markets. This year, Giant Food was among the list of proud partners across the country dedicated to supporting the future of farming.

Farming is a vital link in our food chain, and local farmers are an important part of the Mid-Atlantic’s economy, so it’s great to see Giant supporting their great work with this donation.

Another thing I want to focus on in the column is the great work many retailers are doing to help our communities and businesses go green. So, I was thrilled to see the ad that MOM’s Organic Markets is running in this issue (see page 57) because, boy are they serious about doing everything they can to protect the environment! In fact, their stated purpose as a company is “To protect and restore the environment.” And they’ve been doing so for a long time. In fact, MOM’s eliminated plastic bags in 2005 and use only compostable bags in their

produce section and paper bags at checkout – **2005!!!** Three years after that, they introduced a 10 cents per bag credit for customers who used reusable bags. In 2010, they introduced what they called “Plastic Surgery” which was a comprehensive storewide effort to eliminate unnecessary plastic waste. The first step in that process was to ban bottled still water, replacing it with water machines and reusable water containers. In 2020, MOM’s said its customers prevented more than 2.6 million bags from being used by bringing in their own, which averaged to more than 7,000 bags per day.

Cutting way down on plastics isn’t the only thing MOM’s does to stay green. In 2013, rooftop solar panels were installed at the Rockville, MD-based retailer’s Waldorf, MD store and in 2016, they installed a 1.5-megawatt off-site solar project in Kingsville, MD. That solar farm generates about 25 percent of MOM’s total power needs at its 21 store locations.

Solar rooftop panels were added to the White Marsh MOM’s in 2017 and the College Park store in 2020. In 2021, the company began sponsoring a local community solar project in Yorkers, NY. In 2021 a rooftop solar array was added to the Abington, MD store and MOM’s sponsored a local community solar project in Cherry Hill, NJ.

For shoppers in the Frederick, MD, Woodbridge, VA and Abington, PA stores, MOM’s hosts free and fast car charging stations as well as free Level II charging stations at all of their other locations, except Bowie.

I could go on, but we’ve got a paper to put out, so I encourage you to check out the other terrific green things MOM’s is doing at <https://momsorganicmarket.com/ourpurpose/>.



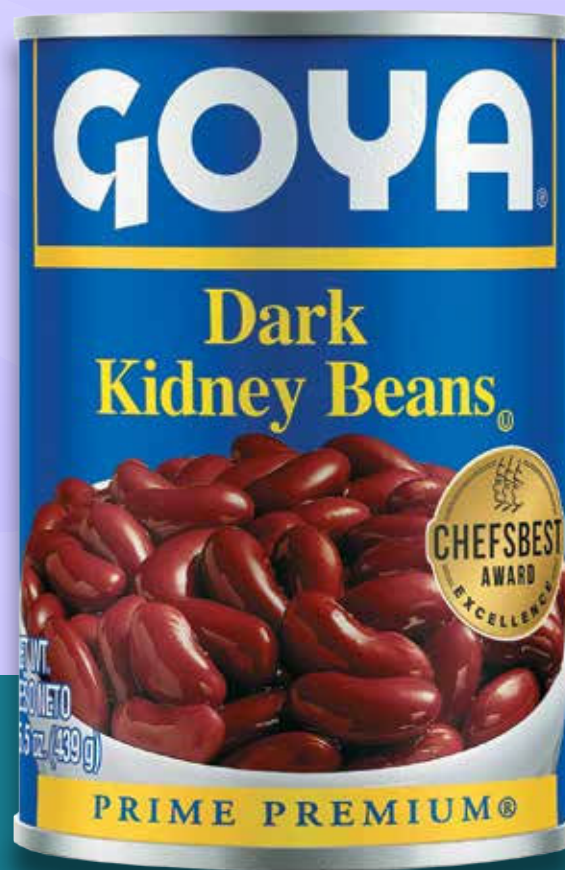
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Publishers of
Food World
and Food Trade News

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Terri Maloney *VP/Editorial Director*
Maria Maggio *VP/GM-Food Trade News*
Kevin Gallagher *VP/Food Trade News*
Beth Pripstein *Circulation Manager*

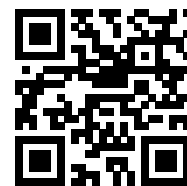
Food World (USPS 203920) is published monthly for \$69 a year by Best-Met Publishing Co. Inc., 9030 Red Branch Rd., Suite 110, Columbia, MD 21045. Periodicals Postage paid at Columbia, Maryland and additional mailing offices. POSTMASTER: Send address changes to Best-Met Publishing Co. Inc., 9030 Red Branch Rd., Suite 110, Columbia, MD 21045.

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TAKING STOCK

From page 1

mained strong not only during the first two years of COVID, but in the ensuing nearly 18 months where inflation has provided a cushion and cover up to the challenges that retailers were facing. As a group, we've kind of accepted that supply chain issues, labor challenges and trading down were part of the new reality, but as long as sales were good, we could offset those problems. Overall sales now have dipped and will continue to decline because many Americans have hit the inflection point of affordability and the threat of a recession is closer to reality than it was six months ago. And the reduction of SNAP benefits has also impacted sales" said an owner of a strong regional group based in the Mid-Atlantic.

In early June, I attended Saint Joseph's University's annual Food Industry Summit in Philadelphia, where a variety of speakers talked primarily about the growing presence of digital marketing and the state of the current economy and how it may affect consumer behavior.

One speaker, Jason Potter, senior VP and head of category leadership for service agency/broker Advantage Solutions, spoke articulately about the state of the industry. During his 45-minute presentation, one slide stood out – **CEO Confidence Measure: 87 Percent Anticipate Recession In The Next 12-18 Months.**

After talking to more than 40 retailers, suppliers and food brokers over the past six weeks, I agree with Potter – except I think he's betting on the "over." If the current trendline continues (not only from direct feedback to me but from studying recent sales and earnings results), the worse stuff could touch ground by the end of the summer with Q4 shaping up as a potential disaster zone.

And strangely enough, the one protectant that both suppliers and retailers might still be able to rely upon is continued inflation. Over the past three months the food inflation rate finally dipped to under 10 percent, a number that is still too high. Even with supply chains almost normalized from 28 months ago, many manufacturers have stubbornly refused to significantly lower wholesale prices and some of the larger CPG firms have continued to raise prices and brazenly defended their actions. To be balanced, any industry that is highly labor intensive has faced significant internal cost increases

TAKING STOCK continues on page 18

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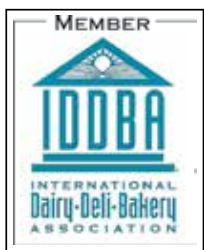
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The Mid-Atlantic Market

Food World describes the 89 counties/cities it covers monthly as the Mid-Atlantic market. This market covers the region from Harrisburg, PA to Norfolk, VA on a north-south plane and from Kent County, DE (Dover) to the Charlottesville area of Virginia on an east-west plane. This map shows the area included in the study.

Several retailers included in this study also operate stores outside of this area. Data on those stores outside of our 89-county geography are not part of this study.

Over the last 12 months, the number one factor influencing all sales data has been continued inflation (the 12-month average was 11 percent). During the first three months of 2023 there was a mild mitigation of price increases, but not enough to keep inflation from remaining the biggest challenge for retailers and consumers. And higher prices translated to higher sales both at the store level and in the overall county-by-county spending for retail food.

So, while county retail sales were at the highest in the 45 years we've been publishing this Market Study, there were still 11 counties in the region where collective revenue from those retailers operating stores in those locales exceeded the overall per capita retail food sales for those counties.

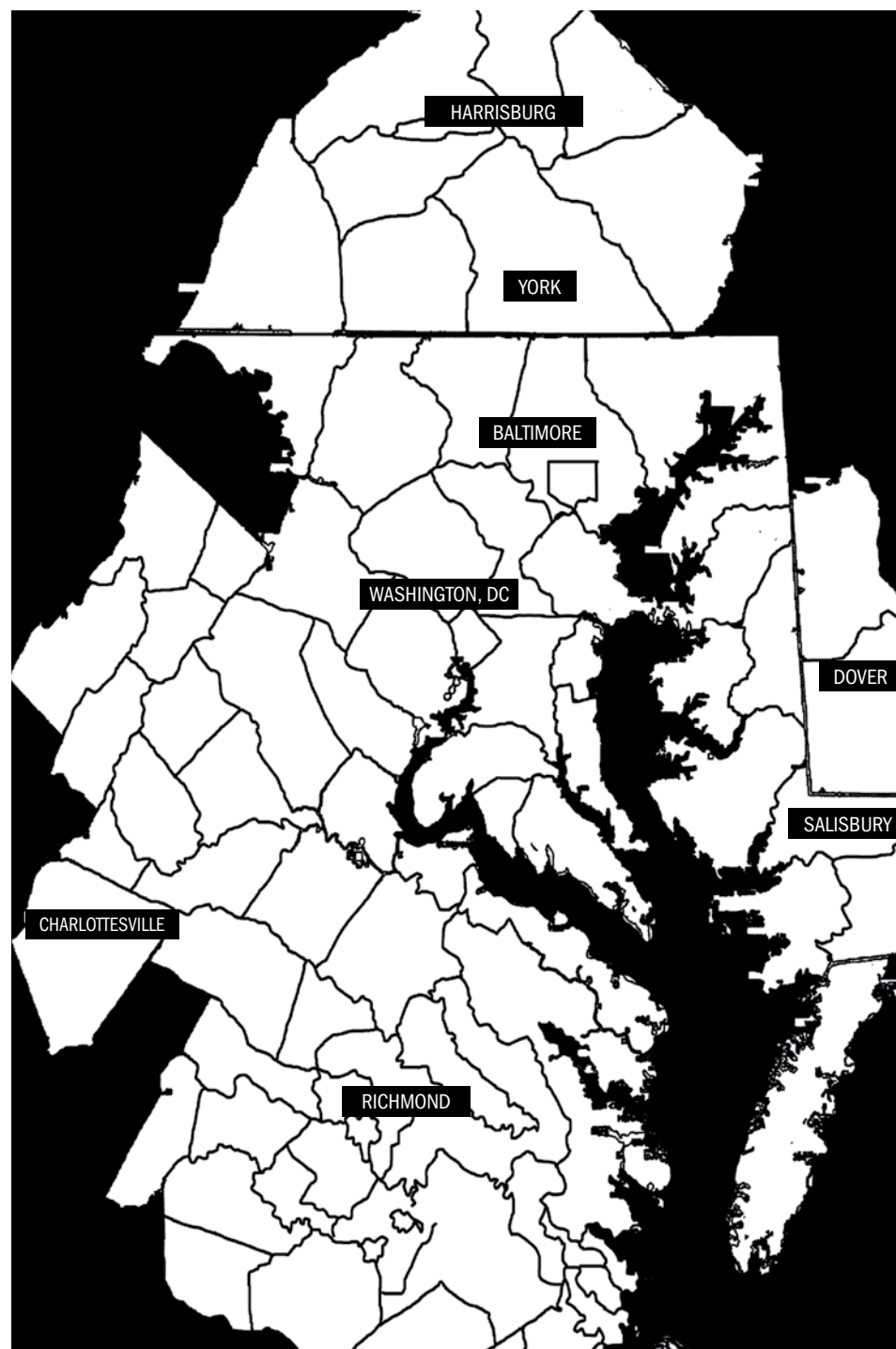
There is an explanation for this: the term is called leakage and simply means that consumers in other counties or cities actually "spill in" and shop in supermarkets, club stores, drug stores, c-stores and units operated by mass merchants in these more densely populated adjacent jurisdictions. Remember, county food sales are based on population and per capita weekly food expenditures of residents from only that particular county.

Leakage, or "county-hopping," can result from a sparsity of stores in one county causing consumers to shop in a bordering county where food retailing opportunities are more available, creating a build-up of food sales in those areas. High volume retailers such as Walmart, Costco and Wegmans, which operate stores in the 75,000-214,000 square foot range, can draw people from a much wider geographic area than virtually all other retailers in a given marketing area. Sales in summer or winter resort areas also contribute to "leakage" in certain counties.

Beach havens such as Sussex County, DE (Rehoboth Beach), Worcester County, MD (Ocean City), Accomack County, VA (Chincoteague) and Virginia Beach, VA draw much of their summer volume from visitors who don't reside in those resort areas causing leakage. Other counties where retail sales surpassed 100 percent of the per capita county sales totals included Chesterfield, VA; Cumberland, PA; Fairfax, VA; Lebanon, PA; Montgomery, MD; New Kent, VA; Sussex, DE; and Virginia Beach, VA. In these counties, non-residents shopped at stores in that "spill-in" county because of more desirable shopping opportunities and/or fewer shopping choices in the county where they live.

Why are some percentages lower than others?

There are several reasons. Many of the more rural counties have only single-store operators, which are not part of the study. And, in more rural counties, small convenience store operators and other outlets (dollar stores, independent fuel stations, etc.) that sell food and HBC products comprise the bulk of the counties' business but are not included in the survey.



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FOOD WORLD'S LEADING CHAIN STORES: 2023

A corporate chain is defined as any retailer operating more than 17 stores. All companies listed below operate 18 or more supermarkets, convenience stores, drug units or club stores (although not necessarily in this region, as some of the businesses listed below operate other stores outside of the area *Food World* defines as the Mid-Atlantic market). Military commissaries, Kmart, Target and Walmart are listed as well. Sales for club stores, Kmart, Target and Walmart are extrapolated to include comparable supermarket departments - as explained on page 87. Petroleum sales are not included. **Total sales of retail grocery, drugs, HBC, general merchandise and tobacco products in the Mid-Atlantic area are \$60.58 billion.**

Rank	Company	Stores	2023 Sales (in millions)	2023 % of Area Market
1	Giant Food	161	\$6,377.00	10.53%
2	Walmart (SuperCenter/Neighborhood Mkt)	159	\$6,064.50	10.01%
3	CVS	631	\$3,766.70	6.22%
4	Food Lion	256	\$3,457.30	5.71%
5	Albertsons (Acme/Balducci's/Safeway)	124	\$3,364.90	5.56%
6	The Giant Co. (Martin's)	63	\$3,012.50	4.97%
7	7-Eleven	1,122	\$2,620.40	4.33%
8	Harris Teeter	78	\$2,529.00	4.18%
9	Wegmans	26	\$2,370.00	3.91%
10	Target (Super Target)	114	\$2,219.50	3.66%
11	International Markets	137	\$2,123.40	3.51%
12	Costco	30	\$2,031.60	3.35%
13	Weis Markets	96	\$1,982.27	3.27%
14	Walgreens	317	\$1,897.00	3.13%
15	Whole Foods (Amazon Fresh)	42	\$1,472.40	2.43%
16	Wawa	185	\$1,391.13	2.30%
17	Kroger (Marketplace)	37	\$1,369.70	2.26%
18	Aldi	144	\$1,256.80	2.08%
19	BJ's Wholesale Club	30	\$1,175.60	1.94%
20	Sam's Club	26	\$1,116.60	1.84%
21	Trader Joe's	30	\$790.40	1.31%
22	Royal Farm Stores	238	\$681.40	1.13%
23	Sheetz	159	\$659.00	1.09%
24	Rite Aid	176	\$653.20	1.08%
25	Shoppers	22	\$620.30	1.02%
26	Military Commissaries	20	\$535.89	0.88%
27	Lidl	60	\$512.90	0.85%
28	ShopRite (Price Rite)	14	\$422.92	0.70%
29	C&S Independents	86	\$350.57	0.58%
30	Redner's Markets	14	\$318.50	0.53%
31	Publix	19	\$307.00	0.51%
32	MOM's Organic Market	16	\$254.80	0.42%
33	Save A Lot	33	\$212.90	0.35%
34	The Fresh Market	16	\$205.80	0.34%
35	Turkey Hill	118	\$187.50	0.31%
36	Fas-Marts	97	\$171.10	0.28%
37	Rutter's Farm Stores	72	\$156.20	0.26%
38	Sprouts	6	\$116.20	0.19%
39	High's/Baltimore	57	\$108.90	0.18%
40	Grocery Outlet	15	\$100.30	0.17%
41	Dash-In	45	\$94.90	0.16%
42	Great Valu	8	\$79.60	0.13%
43	Miller Marts	34	\$64.40	0.11%
44	Circle K	26	\$59.00	0.10%
45	IGA	6	\$58.77	0.10%
46	Giant Eagle (Get Go)	4	\$42.30	0.07%
47	ASG (Compare)	7	\$24.10	0.04%
48	America's Food Basket	1	\$7.80	0.01%
GRAND TOTAL		5,177	\$59,391.40	98.04%

() Name in parentheses indicates another banner used by the company.

Source: *Food World*, June 2023



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FOOD WORLD MARKET STUDY 2023: RULES & ANALYSIS

For the third consecutive year, grocery retailers in the Mid-Atlantic enjoyed record or near record-breaking sales, primed almost exclusively by the continued high rate of inflation. A year ago, many predicted that over the ensuing 12 months price increases would mitigate as supply chains became more normalized as consumers had shown some early signs of “trading down” caution.

Fast forward to today. The economic indicators remain worrisome, trading down is continuing and the financial burden on American families, particularly ones in the most challenged economic strata, has become more difficult. Still, same store sales remain generally solid (even if the challenge to meet earnings expectations have become more difficult) and many retailers we’ve talked to in the past year believe the third and fourth quarters of 2023 might not be as burdensome as they had thought earlier this year.

Clearly, there are several factors at play. The national economy, which seems to teeter weekly between comeback and recession, may have stabilized to the point where there’s now some optimism that the bottom won’t be dropping out any time soon. Additionally, while food prices remain high (11 percent increase over the last 12 months), the multiple price increases that many manufacturers took in 2022 have diminished to some degree. Certainly not to the point where consumers are happy, but many of the top CPGs in the country have been almost gleeful in the fact that they will continue to increase prices where they feel it’s warranted (even if they’re not supply chain related). It might be counterintuitive, but those high prices are continuing to keep revenues high. And not to throw all the blame on sup-

pliers, it’s now a forever reality that the cost (and retention) of labor remains both a significant economic and employment hurdle.

As we do every year, we try to highlight those retailers that did an exceptional job over the past year. Simply based on same store sales gains, it’s no surprise that club store merchants Costco and BJ’s had exceptional years. Among discounters, big format retailer Walmart used its EDLP message to drive increased comp revenue, as did smaller box Aldi which continued to open stores (7), grow same store sales, and increase basket size. Wawa continued to be the c-store per store average leader with an exceptional year, and among traditional supermarkets the best performer was Wegmans, which opened two new stores in the Food World market area region (and another in Wilmington, DE) and continued to produce stellar comp store increases with its high level of customer service.

With a cushion of inflation, it was difficult to find many retailers that struggled, but there certainly was one that stood out - Amazon Fresh.

The three-year-old unit of Amazon announced in March that it was “pausing” store openings for its troubled smaller format conventional grocery store, Amazon Fresh (AF). The 43 stores currently operating nationally (including eight in the greater Washington area) would remain open. But, approximately 30 units under lease or construction have been shelved. The failure of AF is almost jaw-dropping. For nearly four decades, the Seattle-based firm could do little wrong with its risk-taking ventures and bold acquisitions (including paying \$13.7 billion in cash for Whole Foods Market in 2017). Observers knew that to fully compete in its diverse retail universe, Am-

azon needed to further bolster its brick and mortar presence and with food a big driver of revenue, the development of Amazon Fresh seemed like a logical pathway. But, after years of internal development, Amazon delivered the equivalent of the Edsel. Creative merchandising? Nada. Disciplined store operations? Nope. Ample selection of product? Sorry. Even the intangibles of store flow and continuity are awful. It’s like Amazon’s senior leaders went into the think tank and unveiled another version of “Ishtar.”

As we’ve done since 1979, let’s review the key individual markets in our 89-county region and assess and analyze what’s occurred over the past year.

Baltimore-Washington

With very few new store openings in the market to report, the top of the leaderboard remained intact. Giant Food remained dominant, increasing its share to 17.2 percent while adding a net new store, a former Shoppers unit in the Federal Hill area of Baltimore. Second place Albertsons, which agreed to merge with Kroger in October, continued to operate 114 Safeway and Balducci’s stores in the \$35.1 billion marketing area, and Walmart, whose bold experiment of DC expansion a decade ago, proved overblown, closed one if its three District stores earlier this year. However, the planet’s largest retailer saw strong comps from its other 61 B-W stores and maintained a solid hold on third place, grabbing 6.3 percent of the market’s business. Those retailers that did cause a ripple included Wegmans with two high volume openings (Alexandria and its first Washington, DC store) and Aldi, which opened four new discount units in the last 12 months.

With many retailers now focusing on e-commerce, don’t expect a lot of market share change in the near future.

Eastern Shore

When the top two retailers - Walmart and Food Lion - control nearly one-third of all grocery sales, you shouldn’t expect much market movement. That’s the case in the smallish but growing \$3.1 billion Eastern Shore Market which encompasses 12 counties in Delaware, Maryland and Virginia. Both chains enjoyed solid years based totally on strong same store sales. Albertsons (Acme), Giant Food and Wawa grabbed third, fourth and fifth place (although the c-store operator closed two stores) and Walgreens was the dominant drug chain on the Delmarva Peninsula. Those that opened E. Shore stores during the past year included Royal Farms, Aldi, 7-Eleven and Redner’s Market, which debuted its long-awaited Lewes, DE supermarket late last year.

Central Pennsylvania

TGC - The Giant Company - the perennial Central Pennsylvania market leader held serve and continued to dominate the landscape of the eight-county marketing area. Now controlling an impressive 33 percent of the total ACV in CPA, TGC more than doubled the share of next closest rival Weis which garnered 12.1 percent of the \$7.3 billion market. Walmart, on the strength of strong comp sales, maintained its third place position and captured 10.8 percent of the market. Like many other markets during the pandemic era, there was very little new store movement in CPA. In fact, the top three merchants - TGC (52), Weis (38) and Walmart (20) - operated the same number of stores as last year. Retail-

ers that did open stores over the past 12 months included Sheetz, Target, Turkey Hill and 7-Eleven.

Richmond

The competitive boxing match continues among three retailers with completely different operating styles. Walmart maintained its narrow margin over Kroger, which maintained its even narrower margin against Food Lion. Unlike a few years ago when new stores were opening at a maddening pace and new competitors were entering the \$4.8 billion growing marketing area, the past 12 months marked a period of near inertia as operators focused on labor and inflation-related issues. With the big three controlling more than 45 percent of Richmond’s business, the next three spots were held by non-supermarket entities - Wawa, CVS and 7-Eleven. Fourth place went to Publix which, although buoyed by its entry into the market in 2017 with the acquisition of 10 Martin’s (Ahold Delhaize USA) stores, has never made the impact expected since its debut. However, the Lakeland, FL-based retailer did enjoy a strong year of comp store sales increases and continues to be the most profitable supermarket chain in the U.S. The highest volume new store to open in the eight-county market (including the city of Richmond) was the new BJ’s club store that opened in Midlothian last December. In Richmond, the new store growth may have abated, but the fierce competition never lets up.

Tidewater

Mano a mano - Food Lion vs. Walmart. It’s a battle that

See **RULES & ANALYSIS** on page 87



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Quincy, MA 02169
Phone: (800) 767-7772
Web: aholddelhaize.com
Ahold Delhaize CEO: Frans Muller
Ahold Delhaize USA CEO: JJ Fleeman
Pres.-RBS: Roger Wheeler

Albertsons Companies

Mid-Atlantic Division
75 Valley Stream Pkwy.
Malvern, PA 19355
Phone: (610) 889-4000
Web: acmemarkets.com, safeway.com, kingsfoodmarkets.com, balduccis.com
Pres.: Tom Lofland
SVP-Ops.: Bill Crosby
SVP-Merch./Marketing: Jay Habben
VP-Merch./Mktg.: Jim Thatcher
VPs-Ops.: Brad Spooner, Mike Styer, Tom McNerney
VP-HR: Kimberly Hilser
Dir.-Ops: Jonathan Cruz
DMs: Johnathan Simmons, Chris Sanchez, Brendan Murphy, Kevin Reger, Kristan Lewis, Amy Remillard, Matt Juhring, Tiffany Knottingham,

John Toomey, Chrissy Pratt, Richard O'Neal, Ed Tippett, Bob Rosato, Lori Valenzuela, Theresa Farello
Dir. Merch and Marketing: Sherry Caldwell
Dir.-Merch.: Arthur Goncalves
Sales Mgrs.-Own Brands: Anne Marie Mozzone, Matt Merville
Sales Mgrs.-Grocery: Pat Hildebrand, Jared Labar
Sales Mgr.-GM/HHB: Amber Armstrong
Sales Mgrs.-Liquor: Tim Ley, John Coleman
Sales Mgrs.-Produce: Ricardo Dimarzio, Joe Lerario
Sales Mgrs.-Meat: Mike Salisbury, Richard Michener
Sales Mgr.-Seafood: Charlie Bell
Sales Mgrs.-Bakery: Christine Hixon, Michele Tuscano
Sales Mgrs.-Deli: Angie Marshall, Matthew Nangle
Sales Mgrs.-Floral: Katie Vasquez, Michelle Edwards
Sr. Dir.-Catering: Jennifer Fouts
Sr. Dir.-Finance: Randy Weist
Dir.-Loss Prevention: Joe Conway
Dir.-Customer Service: Marianne

Nice-Trionfo
Dir.-Pharmacy: Amir Masood, Janis Levit
Dir-HR: Sloan Nichols
Dir-Labor Rel.: Joan Williams
Dir-Food Safety: James Walden
Dir.-E-Commerce: Alicia Bell, Betsy Gavigan
Corporate offices:
250 Parkcenter Blvd.
Boise, ID 83706
Phone: (208) 395-6200
Pres./CEO: Vivek Sankaran
Web: Albertsons.com
Primary Supplier: Direct
Area Stores: 124 (Includes Acme, Balducci's, Safeway)
Area Vol.: \$3.36 billion

Aldi, Inc.

1200 N. Kirk Rd.
Batavia, IL 60510
Phone: (630) 879-8100
Web: aldi.com
CEO: Jason Hart
Co-Pres.: Charles Youngstrom, David Behm, Brent Laubaugh
Primary Supplier: Direct
Area Stores: 144

Area Vol.: \$1.26 billion

America's Food Basket

1979 Marcus Ave., Ste. 216
New Hyde Park, NY 11042
Phone: (516) 502-2509
Web: afbasket.com
CEO: David Siegel
COO: Daniel Suriel
Primary Supplier: UNFI
Area Stores: 1
Area Vol.: \$7.8 million

B. Green & Co., Inc.

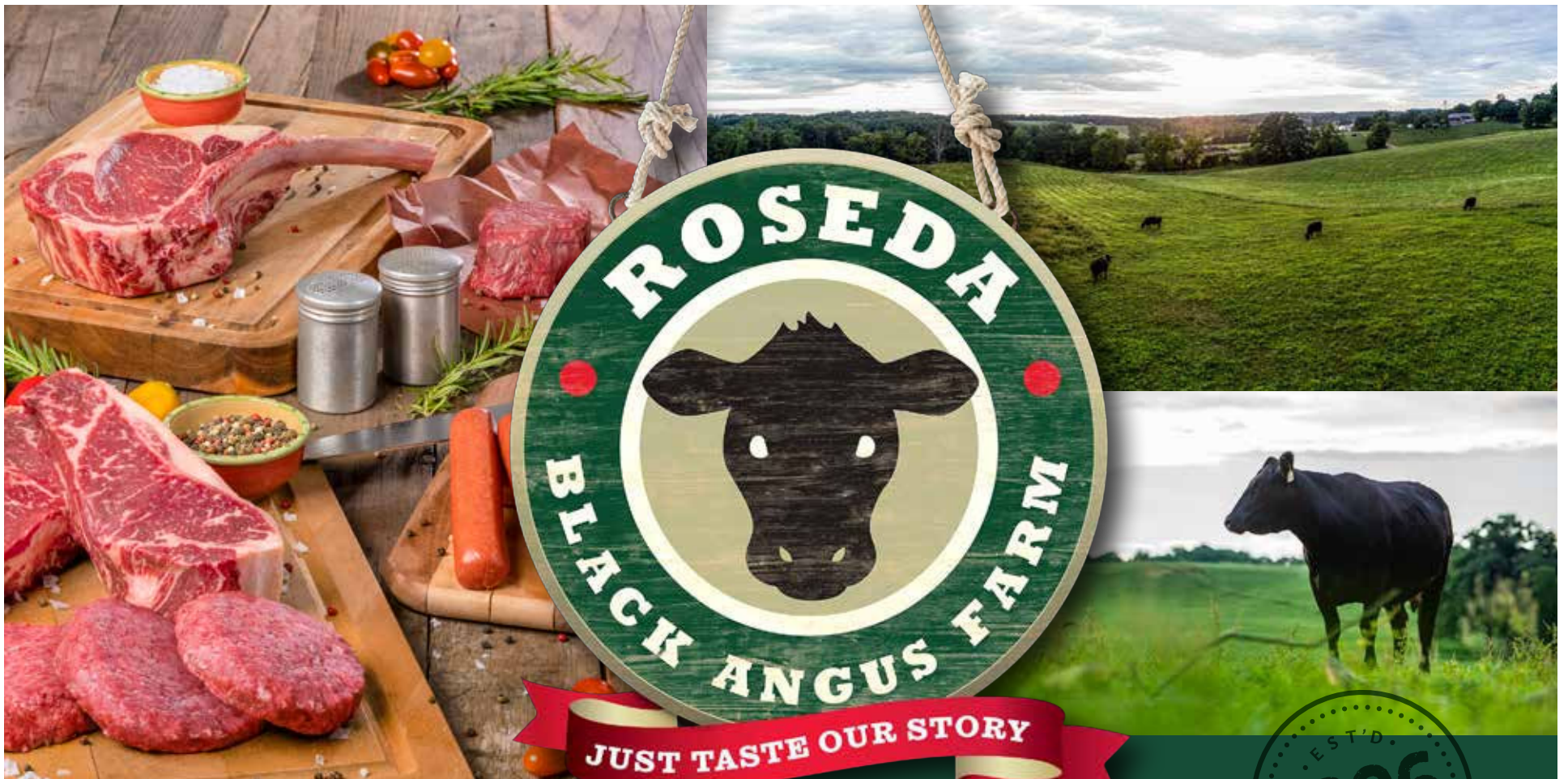
1300 S. Monroe St.
Baltimore, MD 21230
Phone: (410) 539-6134
Web: bgreenco.com
Chmn: Benjamin Green
CEO: Rick Rodgers
Primary Supplier: UNFI
Area Stores: 7 (Includes Food Depot/Green Valley Market)
Area Vol.: \$167.75 million

Boyer's Markets

301 S. Warren St.

See **DIRECTORY** on page 16





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DIRECTORY OF RETAILERS

From page 14

Orwigsburg, PA 17961
 Phone: (570) 366-1477
 Web: boyersfood.com
 Pres.: Dean Walker
 CFO: Matthew Kase
 EVP-Sales/Mktg.: Anthony Gigliotti
 EVP-Ops: Mike Zmitrovich
 Dir.-HR: Ann Marie Blashock
 Meat Merch.: Joseph Cutrona
 Produce Merch.: Michael Bush
 Deli/Bakery/Seafood Merch.: Melissa Erickson
 Non-Perishable Merch.: Jeff O'Neill
 Primary Supplier: UNFI
 Area Stores: 1
 Area Vol.: \$11.34 million

C&S Independents

336 East Penn Ave.
 Robesonia, PA 19551
 Phone: (610) 693-3161
 Web: cswg.com
 Primary Supplier: C&S Wholesale Grocers
 Area Stores: 86
 Area Vol.: \$350.57 million
 *C&S Independents are comprised

of the independent supermarkets serviced by C&S from its Robesonia, PA headquarters.

Eddie's of Roland Park

5125 Roland Ave.
 Baltimore, MD 21210
 Phone: (410) 323-3656
 Web: eddiesofrolandpark.com
 Co-owners: Nancy Cohen, Michael Schaffer, Andrew Schaffer
 Primary Supplier: Bozzuto's
 Area Stores: 2
 Area Vol.: \$40.0 million

Family Owned Markets

951 Roherstown Rd., Unit 201
 Lancaster, PA 17601
 Phone: (717) 874-5152
 Web: familyownedmarkets.com
 Dir.-Marketing: Kevin Hanus
 Primary Supplier: MDI
 Area Stores: 8
 Area Vol.: \$146.61 million
 *This is the advertising and marketing arm that serves a group of independent retailers, including Martin's Country Market, Oregon Dairy, John Herr's Village Market, Saubel's and

Yoder's Country Market.

Food Lion

Div. of Ahold Delhaize USA
 2110 Executive Dr.
 P.O. Box 1330
 Salisbury, NC 28145
 Phone: (704) 633-8250
 Web: foodlion.com
 Pres: Meg Ham
 Primary Supplier: Direct
 Area Stores: 256
 Area Vol.: \$3.46 billion

The Fresh Market

Div. of Cencosud
 300 N. Greene St., Ste. 1100
 Greensboro, NC 27401
 Phone: (336) 272-1338
 Web: thefreshmarket.com
 Pres./CEO: Jason Potter
 Primary Supplier: UNFI
 Area Stores: 16
 Area Vol.: \$205.8 million

Geresbeck's Food Market

2109 Eastern Blvd.
 Baltimore, MD 21220

Phone: (410) 686-3487
 Web: geresbecks.com
 Primary Supplier: C&S
 Area Stores: 3
 Area Vol.: \$35.6 million

The Giant Company

Div. of Ahold Delhaize USA
 P.O. Box 249
 1149 Harrisburg Pike
 Carlisle, PA 17013
 Phone: (717) 249-4000
 Web: giantfoodstores.com
 Interim Pres.: John Ruane
 VP-Omnichannel Ops.: Daren Russ
 VP-Omnichannel Merch.-Center Store: Parag Shah
 VP-Omnichannel Fresh Merch.: Dave Lessard
 Div. VP-Mid-Atlantic: Rebecca Lupfer
 Div. VP-Greater Phil.: Tim Santoro
 VP-Team Experience: Jennifer Heinzen Krueger
 VP-Finance/Strategy: Manuel Haro
 VP-Marketing/Commercial: Joanna Crishock
 Chief of Staff/Communications: April Mock

See **DIRECTORY** on page 68



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TAKING STOCK

from page 6

that aren't going to diminish. The happy medium seems to be somewhere between the current (May 2023) food inflation rate of 5.8 percent and the government's (ridiculous) projection of under 2 percent.

And while it seems counterintuitive to believe that continued high prices (and other economic factors) will actually prevent significant inflation, it's been proven over the last 18 months that there seems to be enough financial security with the middle, upper middle and upper class, that the bottom won't ever fall out.

I think there's some truth to the logic although it's not the kind of secure mindset that I'd feel comfortable with especially for publicly traded companies that have to tell their shareholders that their comp sales, earnings and market value have slipped, while also preaching patience and hope. Even if it's true, Wall Street ain't buyin' that.

But, as we publish our 45th annual Market Study, we can still talk about good news. Here's my annual take on the market leaders in *Food World's* largest trading area, the Baltimore-Washington market.

Giant Food – Another solid year for the perennial market leader as it managed to slightly improve its already dominant market share in the \$35.4 billion market. Like virtually every other retailer in the region, Giant's primary revenue growth catalyst was inflation. And although it has not built a "from the ground up" store in several years, the Landover, MD-based "brand" of Ahold Delhaize USA has benefitted from acquiring closed stores from other retailers in the market - a former ShopRite in Silver Spring, MD unit that replaced an older, smaller unit in Calverton, MD and two former Shoppers stores in Crofton, MD and on Fort Avenue in Baltimore. Giant will open another former Shoppers unit later this year on Perring Parkway in Baltimore. Giant's short-term challenges are similar to other food retailers - labor and shrink - its sales and share of market leadership position are very secure.

Safeway – The division of Albertsons enjoyed very good comp sales in the second largest market in its Mid-Atlantic division. However, there is some concern that the big chain's focus on completing its merger with Kroger has proven to be a distraction. At the least, cap-ex once again has been limited with no new stores opened during the past 12 months. With its excellent locations, Safeway's number two spot in B-W is secure, but if the Kroger merger is approved (a big "if"), how many stores would have to be divested - 20-30? Last month, Albertsons announced a change in leadership at the Mid-Atlantic division - popular and talented president Jim Perkins was moved to corporate headquarters in Boise, ID to lead a potential new company (SpinCo) that would encompass stores not sold after divestiture and veteran executive Tom Lofland, who headed Safeway-Eastern for more than two years, was named to replace Perkins. Depending on the approval of the Kroger-Albertsons deal, there could be some major changes affecting Safeway's status in the B-W market.

Walmart – Not surprisingly, those retailers that benefit most during difficult economic times are discount operators. More than a year ago, Walmart CEO Doug McMillan predicted that as inflation continued to spiral, his company would stand to gain the most business. And that's exactly what happened. Comp store revenue was very good as the "Bentonville Behemoth" once again did not open any new stores (in fact, it closed one of its three DC units) as it continues to prioritize its digital platforms. And that effort is paying off as Walmart has arguably become the leading omnichannel merchant in the market. Of course, Walmart's brick-and-mortar business could be even stronger if it provided better customer service/training and maintained better in-stock conditions. But that's never been the case at the world's largest merchant. It's very content to chip away at competitors' business while maintaining solid customer loyalty of its own.

Harris Teeter – While HT's same-store sales were decent (thank you, inflation) the division of Kroger has slipped a bit in terms of customer service. Obviously, hiring people (and retaining them) is an issue that's impact-

TAKING STOCK continues on page 38



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PEOPLE

The Pennsylvania Food Merchants Association recently announced the addition of three new members to its board of directors: **Jess Reese**, VP of sales, small format and value for Utz Snacks; **Tim Murray**, manager, industry engagement for Altria Group Distribution Company; and **Keith Martin**, director of business development, executive director of business development for Associated Wholesale Grocers.

“In welcoming these respected and active members of the food retail industry to the board, they bring years of experience and knowledge that complement our current outstanding PFMA Board of Directors,” said Alex Baloga, president and CEO of PFMA. “We look forward to benefitting from their perspectives and expertise.”

Reese has a diverse background in revenue management and sales, with experience across multiple channels, ERP implementation, price and promotion

strategy, change management, and team development. She currently serves as chair of the Utz Women’s Mentoring Group, guiding the first diversity and inclusion group within the Hanover, PA based snack manufacturer. She has also served on the board of the American Wholesale Marketers Association, San Antonio Food Bank, and as the executive finance chair of Network of Executive Women Northwest Arkansas.

Reese graduated with a bachelor of science degree in agricultural economics from Texas A&M University and started her more than 20-year career in food with ConAgra Foods and Daymon Worldwide before joining Utz in 2017.

Murray began his career with Philip Morris USA in 1998 as a territory sales manager in Deerfield Beach, FL. Over the past 25 years, he has served in a variety of roles within the Altria family of companies, including sales, operations, and analytics. In his



Jess Reese



Tim Murray



Keith Martin

current role, Murray is part of a team responsible for developing advocacy solutions in support of Altria Client Services’ Government Affairs department throughout the Eastern United States region. This work further supports the development and execution of engagement sys-

tems that enhance alignment with the states, the industry, and Altria Group Distribution Company.

Murray is a graduate of Florida Atlantic University.

Martin has a long history in wholesale operations, private label, loss prevention, and business

development. Martin also serves on the Virginia Retail Merchants Association board for the past 10 years and is a Board Member of Northwest NC Food Bank.

Martin is a graduate of Surry Community College with an associate of arts and associate of science.

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1400 Air Rail Ave, Virginia Beach, VA 23455 • 757-464-1771

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Washington Supermarket Leaders

- Giant Ups DC Share To 29.5%
- Albertsons Sustains Comps Trend
- Wegmans Adds 2 New Locations
- Discounter Aldi Grows With 2 Units
- Amazon Fresh Skids To Mediocrity

		2023	2023 Sales	% of 2023	2022	2022 Sales	% of 2022
Rank	Company	Stores	(in millions)	Market	Stores	(in millions)	Market
1	Giant Food	114	\$4,264.80	29.46%	114	\$4,067.81	29.43%
2	Albertsons (Balducci's/Safeway)	87	\$2,309.50	15.95%	87	\$2,186.20	15.93%
3	International Markets	106	\$1,712.00	11.82%	106	\$1,634.90	12.26%
4	Harris Teeter	43	\$1,525.30	10.54%	43	\$1,449.30	10.86%
5	Wegmans	15	\$1,484.80	10.26%	12	\$1,154.10	8.65%
6	Whole Foods (Amazon Fresh)	31	\$1,084.10	7.49%	26	\$991.30	7.43%
7	Trader Joe's	19	\$560.40	3.87%	19	\$529.50	3.97%
8	Aldi	54	\$511.90	3.54%	52	\$476.90	3.57%
9	Food Lion	32	\$452.80	3.13%	32	\$430.90	3.23%
10	Shoppers	14	\$401.60	2.77%	12	\$351.50	2.63%
		515	\$14,307.20	98.82%	503	\$13,272.41	98.80%

This chart lists the top 10 supermarket retailers in the Washington market. Counties/cities included are: Washington, DC; Calvert, Charles, Frederick, Montgomery and Prince George's in MD; Arlington, Clarke, Culpeper, Fairfax, Fauquier, King George, Loudoun, Prince William, Spotsylvania, Stafford and Warren and the independent cities of Alexandria, Fairfax, Falls Church and Fredericksburg in VA. Petroleum sales are not included. () Indicates another banner used by the company. **Total supermarket sales for the area are \$14.48 billion.**

Source: Food World, June 2023

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Source: Nielsen Scarborough 2022, Release 1

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Washington Market Leaders

- Alt. Channels Share Still At 32%
- Giant ACV Share Increases
- Drug Chains Keep Closing Units
- Target, Walmart Control 10.13%
- Costco, BJ's Buoyed By Inflation


Rank	Company	2023 Stores	2023 Sales (in millions)	% of 2023 Market	2022 Stores	2022 Sales (in millions)	% of 2022 Market
1	Giant Food	114	\$4,264.80	17.45%	114	\$4,067.81	17.41%
2	Albertsons (Balducci's/Safeway)	87	\$2,309.50	9.45%	87	\$2,186.20	9.40%
3	International Markets	106	\$1,712.00	7.00%	106	\$1,634.90	7.16%
4	CVS	256	\$1,621.30	6.63%	257	\$1,555.70	6.82%
5	Harris Teeter	43	\$1,525.30	6.24%	43	\$1,449.30	6.35%
6	Wegmans	15	\$1,484.80	6.07%	12	\$1,154.10	5.06%
7	Walmart (SuperCenter)	39	\$1,387.00	5.67%	40	\$1,344.00	5.59%
8	Costco	17	\$1,312.50	5.37%	17	\$1,217.00	5.33%
9	7-Eleven	490	\$1,127.80	4.61%	474	\$1,017.00	4.46%
10	Target (Super Target)	50	\$1,090.90	4.46%	49	\$1,015.90	4.45%
11	Whole Foods (Amazon Fresh)	31	\$1,084.10	4.43%	26	\$991.30	4.34%
12	Walgreens	94	\$594.90	2.43%	96	\$572.30	2.51%
13	Trader Joe's	19	\$560.40	2.29%	19	\$529.50	2.32%
14	Aldi	54	\$511.90	2.09%	52	\$476.90	2.09%
15	Food Lion	32	\$452.80	1.85%	32	\$430.90	1.89%
16	Shoppers	14	\$401.60	1.64%	12	\$351.50	1.54%
17	Weis Markets	24	\$379.46	1.55%	24	\$359.16	1.57%
18	BJ's Wholesale Club	9	\$363.80	1.49%	9	\$342.40	1.50%
19	Wawa	50	\$308.64	1.26%	48	\$341.40	1.50%
20	Lidl	29	\$271.20	1.11%	27	\$238.20	1.04%
		1,573	\$22,764.70	93.13%	1,544	\$21,275.00	93.09%

This chart lists top 20 retailers in the Washington market which sell groceries, HBC, drugs, GM, tobacco products. Volumes listed include 100% of store sales for supermarkets, c-stores and drug chains. Sales for club stores, Target and Walmart are extrapolated to include comparable categories, as explained in the formula on page 87. Petroleum sales are not included. Counties/cities included are: Washington, DC; Calvert, Charles, Frederick, Montgomery and Prince George's in MD; Arlington, Clarke, Culpeper, Fairfax, Fauquier, King George, Loudoun, Prince William, Spotsylvania, Stafford and Warren and the independent cities of Alexandria, Fairfax, Falls Church and Fredericksburg in VA. () Indicates another banner used by the company. **Total food sales for the area are: \$24.44 billion.** Source: Food World, June 2023


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We, the more than 18,000 hard-working employees of Giant and Safeway represented by UFCW Local 400, have more than earned a new collective bargaining agreement with raises that overcome inflation, better schedules with hours we can live on, and secure health care we can count on.

Throughout the pandemic, we risked our lives as first responders to keep our customers fed and help Giant and Safeway earn record profits. Today, we still risk our lives due to a different epidemic — gun violence in grocery stores.

Thanks to our hard, heroic work, Giant and Safeway still rank #1 and #2 in the Washington-Baltimore market. And they remain highly profitable.

In this fall's upcoming contract negotiations, we will insist on our fair share of the prosperity our hard work generates and on fair compensation for the sacrifices we make each and every day for our employers. And we will stand strong in solidarity — through thick and thin, if need be — on behalf of these reasonable goals.

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President



Christopher Hoffmann
Secretary-Treasurer

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Baltimore Supermarket Leaders

- Giant's Share Grows To 34.2%
- Safeway Comps Remain Strong
- Wegmans Is Per-Store Avg. Leader
- Weis Now Solidly In Third Place
- With 2 New Stores, Aldi At 29 Units

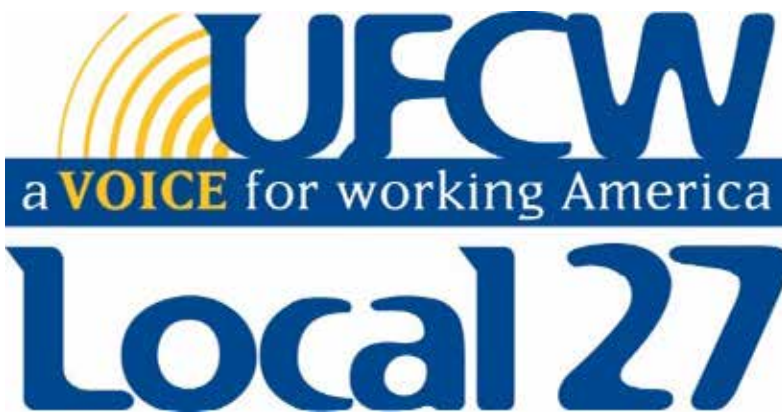
Rank	Company	2023 Stores	2023 Sales (in millions)	% of 2023 Market	2022 Stores	2022 Sales (in millions)	% of 2022 Market
1	Giant Food	41	\$1,814.00	34.20%	40	\$1,682.95	34.16%
2	Albertsons (Acme/Safeway)	27	\$784.20	14.78%	27	\$756.60	14.68%
3	Weis Markets	25	\$534.63	10.08%	25	\$528.67	10.25%
4	Wegmans	5	\$471.20	8.88%	5	\$447.10	8.67%
5	ShopRite (Klein's/Village/PR)	11	\$377.22	7.11%	12	\$385.50	7.48%
6	International Markets	20	\$289.10	5.45%	20	\$274.90	5.33%
7	Harris Teeter	6	\$246.50	4.65%	6	\$231.30	4.49%
8	Food Lion	20	\$239.60	4.52%	20	\$231.20	4.48%
9	Aldi	29	\$223.00	4.20%	27	\$204.40	3.96%
10	Shoppers	8	\$218.70	4.12%	8	\$215.00	4.17%
		192	\$5,198.15	98.00%	190	\$4,957.62	97.98%

The chart above lists the top 10 supermarket retailers in the Baltimore market. Counties/cities included are: Anne Arundel, Baltimore City, Baltimore, Carroll, Harford, Howard and Queen Anne's. Petroleum sales are not included. () Indicates another banner used by the company.
Total supermarket sales for the area are \$5.3 billion.

Source: Food World, June 2023



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*According to a recent Department of Labor study. See "Union Members – Union Members – 2015," news release USDL-15-0072 (U.S. Dept. of Labor Statistics, January 23, 2015)



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Base: 2,356,637 Baltimore DMA adults who shopped any grocery store in the past week; 1,526,960 Baltimore DMA adults who use coupons for groceries; 659,190 Baltimore DMA millennials. Source: Nielsen Scarborough 2023 R1.

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Baltimore Market Leaders

- Alts. Share Grows To 37.2%
- Giant Extends Lead Over WM
- Mass. Share Is Now 11.1%
- 7-Eleven, Royal Farms, Wawa: 8.5%
- Club Share Also At 8.5%

Rank	Company	2023 Stores	2023 Sales (in millions)	% of 2023 Market	2022 Stores	2022 Sales (in millions)	% of 2022 Market
1	Giant Food	41	\$1,814.00	16.54%	40	\$1,682.95	16.19%
2	Walmart (SuperCenter)	22	\$829.50	7.56%	22	\$782.30	7.53%
3	Albertsons (Acme/Safeway)	27	\$784.20	7.15%	27	\$756.60	7.28%
4	Weis Markets	25	\$534.63	4.87%	25	\$528.67	5.09%
5	Walgreens	84	\$501.90	4.58%	84	\$480.20	4.62%
6	CVS	88	\$496.00	4.52%	88	\$478.50	4.60%
7	Wegmans	5	\$471.20	4.30%	5	\$447.10	4.30%
8	Target	19	\$383.70	3.50%	19	\$367.10	3.53%
9	ShopRite (Klein's/Village/PR)	11	\$377.22	3.44%	12	\$385.50	3.71%
10	7-Eleven	167	\$373.70	3.41%	163	\$325.30	3.13%
11	Royal Farm Stores	125	\$341.80	3.12%	124	\$316.70	3.05%
12	Costco	5	\$326.30	2.97%	5	\$304.10	2.93%
13	Sam's Club	6	\$321.80	2.93%	6	\$303.60	2.92%
14	BJ's Wholesale Club	7	\$290.60	2.65%	7	\$270.10	2.60%
15	International Markets	20	\$289.10	2.64%	20	\$274.90	2.64%
16	Harris Teeter	6	\$246.50	2.25%	6	\$231.30	2.22%
17	Food Lion	20	\$239.60	2.18%	20	\$231.20	2.22%
18	Aldi	29	\$223.00	2.03%	27	\$204.40	1.97%
19	Shoppers	8	\$218.70	1.99%	8	\$215.00	2.07%
20	Wawa	31	\$218.14	1.99%	29	\$161.60	1.55%
		746	\$9,281.59	84.61%	737	\$8,747.12	84.14%

This chart lists the top 20 retailers in the Baltimore market which sell groceries, HBC, drugs, general merchandise and tobacco products. Volumes listed include 100% of store sales for supermarkets, c-stores and drug chains. Sales for club stores, Target and Walmart are extrapolated to include comparable categories, as explained in the formula on page 87. Petroleum sales are not included. Counties/cities included are: Anne Arundel, Baltimore City, Baltimore, Carroll, Harford, Howard and Queen Anne's. () Indicates another banner used by the company. **Total food sales for the area are: \$10.97 billion.** Source: *Food World*, June 2023



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FOOD WORLD'S LEADING INDEPENDENTS: 2023

An independent is defined as any retailer that operates fewer than 18 stores.

Rank	Company	2023 Supermarkets	2023 (in millions)	2022 Supermarkets	2022 (in millions)	Headquarters	Primary Supplier
1	Karns Prime & Fancy Foods	10	\$188.00	10	\$184.00	Mechanicsburg, PA	UNFI
2	B. Green (Food Depot/Green Valley)	7	\$167.75	8	\$195.40	Baltimore, MD	UNFI
3	Family Owned Markets	8	\$146.61	8	\$141.03	Millersville, PA	MDI
4	Streets Market (Snider's)	11	\$96.70	12	\$100.10	Washington, DC	Bozzuto's
5	Graul's	6	\$68.00	6	\$64.90	Baltimore, MD	UNFI
6	Sharp Shopper	4	\$53.70	4	\$51.20	Ephrata, PA	Direct
7	Eddie's of Roland Park	2	\$40.00	2	\$40.00	Baltimore, MD	Bozzuto's
8	Geresbeck's Food Market	3	\$35.60	3	\$34.90	Baltimore, MD	C&S
9	Roots Markets	2	\$24.00	2	\$22.60	Clarksville, MD	UNFI
10	Boyer's Markets	1	\$11.34	1	\$11.18	Orwigsburg, PA	UNFI
GRAND TOTAL		54	\$831.70	56	\$845.31		

() Name in parentheses indicates another banner used by the company.

Source: *Food World*, June 2023

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IN REVIEW: WALMART

State	County	2023 Stores	2023 Sales (in millions)	2023 County Food Sales	% of 2023 County Market	2022 Stores	2022 Sales (in millions)	% of 2022 County Market
DC	Washington (SuperCenter)	2	\$70.90	\$2,617.30	2.71%	3	\$105.80	4.27%
DC Recap: 2 stores with sales of \$70.9 million. Total retail food sales for DC in the study: \$2.62 billion. Walmart share of DC is 2.71%.								
DE	Kent (SuperCenter)	2	\$66.20	\$560.60	11.81%	2	\$63.50	12.08%
DE	Sussex (SuperCenter)	4	\$143.40	\$1,078.40	13.30%	4	\$135.90	13.56%
DE Recap: 6 stores with sales of \$209.6 million. Total retail food sales for DE in the study: \$1.64 billion. Walmart share of DE is 12.79%.								
MD	Anne Arundel (SuperCenter)	4	\$164.30	\$2,491.60	6.59%	4	\$153.20	6.58%
MD	Baltimore County (SuperCenter)	9	\$367.50	\$3,629.50	10.13%	9	\$346.90	10.05%
MD	Calvert (SuperCenter)	2	\$64.90	\$423.20	15.34%	2	\$60.60	15.21%
MD	Caroline (SuperCenter)	1	\$43.20	\$100.70	42.90%	1	\$40.70	47.44%
MD	Carroll (SuperCenter)	4	\$121.50	\$720.30	16.87%	4	\$113.40	16.46%
MD	Cecil (SuperCenter)	2	\$61.40	\$317.20	19.36%	2	\$59.60	20.59%
MD	Charles (SuperCenter)	2	\$78.70	\$564.80	13.93%	2	\$76.20	14.51%
MD	Dorchester (SuperCenter)	1	\$28.20	\$64.60	43.65%	1	\$26.90	45.21%
MD	Frederick (SuperCenter)	2	\$118.60	\$1,015.20	11.68%	2	\$111.40	11.52%
MD	Harford (SuperCenter)	3	\$98.70	\$1,113.40	8.86%	3	\$94.60	9.12%
MD	Howard (SuperCenter)	2	\$77.50	\$1,270.20	6.10%	2	\$74.20	6.17%
MD	Montgomery (SuperCenter)	1	\$40.00	\$3,963.80	1.01%	1	\$37.90	1.01%
MD	Prince George's (SuperCenter)	4	\$88.60	\$3,422.70	2.59%	4	\$83.10	2.58%
MD	St. Mary's (SuperCenter)	1	\$60.20	\$375.20	16.04%	1	\$56.00	14.31%
MD	Talbot	1	\$24.10	\$243.80	9.89%	1	\$22.20	9.75%
MD	Washington (SuperCenter)	2	\$119.50	\$575.10	20.78%	2	\$111.80	20.14%
MD	Wicomico (SuperCenter)	2	\$79.20	\$318.60	24.86%	2	\$74.50	24.86%
MD	Worcester (SuperCenter)	2	\$81.10	\$241.60	33.57%	2	\$76.70	30.84%
MD Recap: 45 stores with sales of \$1.72 billion. Total retail food sales for MD in the study: \$22.75 billion. Walmart share of MD is 7.55%.								
PA	Adams (SuperCenter)	1	\$23.40	\$219.60	10.66%	1	\$21.80	10.13%
PA	Cumberland (SuperCenter)	4	\$125.70	\$1,252.70	10.03%	4	\$119.60	9.91%
PA	Dauphin (SuperCenter)	2	\$84.80	\$1,104.00	7.68%	2	\$80.60	7.55%
PA	Franklin (SuperCenter)	2	\$86.10	\$480.20	17.93%	2	\$82.80	18.17%
PA	Lancaster (SuperCenter)	3	\$145.40	\$1,889.90	7.69%	3	\$136.50	7.37%
PA	Lebanon (SuperCenter)	2	\$91.30	\$487.60	18.72%	2	\$86.90	19.80%
PA	York (SuperCenter)	6	\$229.70	\$1,731.80	13.26%	6	\$217.30	13.23%
PA Recap: 20 stores with sales of \$786.4 million. Total retail food sales for PA in the study: \$7.31 billion. Walmart share of PA is 10.76%.								
VA	Accomack (SuperCenter)	1	\$39.80	\$101.80	39.10%	1	\$33.00	32.74%
VA	Albemarle (SuperCenter)	1	\$40.50	\$699.10	5.79%	1	\$38.90	5.74%
VA	Chesapeake City (SuperCenter)	6	\$175.40	\$947.50	18.51%	6	\$165.10	18.63%
VA	Chesterfield (SuperCenter)	6	\$247.80	\$1,688.50	14.68%	6	\$233.60	15.57%
VA	Culpeper (SuperCenter)	1	\$34.70	\$183.60	18.90%	1	\$32.10	18.51%
VA	Dinwiddie (SuperCenter)	1	\$46.20	\$143.40	32.22%	1	\$43.10	31.95%
VA	Essex (SuperCenter)	1	\$44.90	\$70.40	63.78%	1	\$42.50	63.72%
VA	Fairfax (SuperCenter)	8	\$259.30	\$6,001.60	4.32%	8	\$243.10	4.44%
VA	Fauquier (SuperCenter)	1	\$39.60	\$190.00	20.84%	1	\$37.80	20.06%
VA	Frederick (SuperCenter)	3	\$161.20	\$544.60	29.60%	3	\$150.10	28.73%
VA	Gloucester (SuperCenter)	1	\$39.10	\$136.30	28.69%	1	\$37.10	28.78%
VA	Hampton/Newport News (SC/Neighborhood Mkt)	5	\$167.50	\$1,331.60	12.58%	5	\$158.40	11.88%
VA	Hanover (SC/Neighborhood Mkt)	3	\$113.60	\$515.60	22.03%	3	\$107.80	22.27%
VA	Henrico (SuperCenter)	7	\$301.40	\$2,024.70	14.89%	7	\$283.10	14.37%
VA	James City (SuperCenter)	2	\$79.60	\$452.50	17.59%	2	\$74.30	17.43%
VA	King George (SuperCenter)	1	\$38.90	\$103.80	37.48%	1	\$37.20	38.51%
VA	Lancaster (SuperCenter)	1	\$40.10	\$88.60	45.26%	1	\$38.10	45.20%

IN REVIEW: WALMART

State	County	2023 Stores	2023 Sales (in millions)	2023 County Food Sales	% of 2023 County Market	2022 Stores	2022 Sales (in millions)	% of 2022 County Market
VA	Loudoun (SuperCenter)	3	\$130.30	\$1,629.40	8.00%	3	\$122.90	8.00%
VA	Norfolk City (SC/Neighborhood Mkt)	4	\$171.40	\$841.80	20.36%	4	\$160.70	20.33%
VA	Nottoway (SuperCenter)	1	\$36.50	\$41.10	88.81%	1	\$35.20	89.11%
VA	Orange (SuperCenter)	2	\$70.50	\$148.20	47.57%	2	\$66.30	52.37%
VA	Page (SuperCenter)	1	\$42.90	\$71.70	59.83%	1	\$40.20	54.77%
VA	Portsmouth City (SuperCenter)	1	\$33.10	\$298.30	11.10%	1	\$31.60	11.42%
VA	Powhatan (SuperCenter)	1	\$40.90	\$80.20	51.00%	1	\$39.10	50.85%
VA	Prince William (SuperCenter)	5	\$133.10	\$2,149.40	6.19%	5	\$125.20	6.46%
VA	Shenandoah (SuperCenter)	1	\$39.10	\$122.80	31.84%	1	\$37.40	30.56%
VA	Southampton (SuperCenter)	1	\$45.80	\$97.50	46.97%	1	\$43.60	46.78%
VA	Spotsylvania (SuperCenter)	4	\$173.40	\$856.60	20.24%	4	\$162.10	19.70%
VA	Stafford (SuperCenter)	2	\$71.30	\$441.60	16.15%	2	\$67.20	15.35%
VA	Suffolk City (SuperCenter)	2	\$79.20	\$332.20	23.84%	2	\$74.00	23.96%
VA	Virginia Beach (SC/Neighborhood Mkt)	7	\$251.30	\$1,801.80	13.95%	7	\$242.50	14.31%
VA	Warren (SuperCenter)	1	\$44.70	\$170.40	26.23%	1	\$41.90	25.96%
VA	York (SuperCenter)	1	\$44.30	\$202.80	21.84%	1	\$41.10	22.48%

VA Recap: 86 stores with sales of \$3.28 billion. Total retail food sales for VA in the study: \$26.27 billion. Walmart share of VA is 12.48%.

Mid-Atlantic Recap: 159 stores with sales of \$6.06 billion annually. Mid-Atlantic retail food sales total: \$60.6 billion.

Walmart Per Store Average: \$38.12 million

() Name in parentheses indicates another banner used by the company.

Source: *Food World*, June 2023

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Baltimore-Washington Supermarket Leaders

- Giant Retains B-W Dominance
- Safeway Solid, Comps Healthy
- International Markets Share: 5.7%
- Despite New Stores, AF Sinks
- New Life: Shoppers Adds 2

Rank	Company	2023 Stores	2023 Sales (in millions)	% of 2023 Market	2022 Stores	2022 Sales (in millions)	% of 2022 Market
1	Giant Food	155	\$6,078.80	30.73%	154	\$5,750.76	30.68%
2	Albertsons (Acme/Balducci's/Safeway)	114	\$3,093.70	15.64%	114	\$2,942.80	15.63%
3	International Markets	126	\$2,001.10	10.12%	126	\$1,909.80	10.33%
4	Wegmans	20	\$1,956.00	9.89%	17	\$1,601.20	8.66%
5	Harris Teeter	49	\$1,771.80	8.96%	49	\$1,680.60	9.09%
6	Whole Foods (Amazon Fresh)	36	\$1,279.50	6.47%	31	\$1,180.40	6.38%
7	Weis Markets	49	\$914.09	4.62%	49	\$887.83	4.80%
8	Aldi	83	\$734.90	3.71%	79	\$681.30	3.68%
9	Food Lion	52	\$692.40	3.50%	52	\$662.10	3.58%
10	Trader Joe's	23	\$649.70	3.28%	23	\$615.10	3.33%
		707	\$19,171.99	96.91%	694	\$17,911.89	96.84%

This chart lists the top 10 supermarket retailers in the B-W market. Counties/cities included are: Washington, DC; Anne Arundel, Balt City, Baltimore, Calvert, Carroll, Charles, Frederick, Harford, Howard, Montgomery, Prince George's, Queen Anne's in MD; Arlington, Clarke, Culpeper, Fairfax, Fauquier, King George, Loudoun, Pr. William, Spotsylvania, Stafford and Warren and the independent cities of Alexandria, Fairfax, Falls Church and Fredericksburg in VA. Petroleum sales are not included. () Indicates another banner used by the company. **Total supermarket sales for the area are \$19.78 billion** Source: *Food World*, June 2023



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Baltimore-Washington Market Leaders

- Alts. Share Grows To 33.2%
- Giant Tops Among All Comers
- WM: Closes DC Unit, Comps Healthy
- Mass Merchants Share At 10.4%
- Costco, BJ's, Sam's Grab 7.9%

Rank	Company	2023 Stores	2023 Sales (in millions)	% of 2023 Market	2022 Stores	2022 Sales (in millions)	% of 2022 Market
1	Giant Food	155	\$6,078.80	17.17%	154	\$5,750.76	17.31%
2	Albertsons (Acme/Balducci's/Sway)	114	\$3,093.70	8.74%	114	\$2,942.80	8.86%
3	Walmart (SuperCenter)	61	\$2,216.50	6.26%	62	\$2,126.80	6.40%
4	CVS	344	\$2,117.30	5.98%	345	\$2,034.20	6.12%
5	International Markets	126	\$2,001.10	5.65%	126	\$1,909.80	5.75%
6	Wegmans	20	\$1,956.00	5.52%	17	\$1,601.20	4.82%
7	Harris Teeter	49	\$1,771.80	5.00%	49	\$1,680.60	5.06%
8	Costco	22	\$1,638.80	4.63%	22	\$1,521.10	4.58%
9	7-Eleven	657	\$1,501.50	4.24%	637	\$1,342.30	4.04%
10	Target (Super Target)	69	\$1,474.60	4.16%	68	\$1,383.00	4.16%
11	Whole Foods (Amazon Fresh)	36	\$1,279.50	3.61%	31	\$1,180.40	3.55%
12	Walgreens	178	\$1,096.80	3.10%	180	\$1,052.50	3.17%
13	Weis Markets	49	\$914.09	2.58%	49	\$887.83	2.67%
14	Aldi	83	\$734.90	2.08%	79	\$681.30	2.05%
15	Food Lion	52	\$692.40	1.96%	52	\$662.10	1.99%
16	BJ's Wholesale Club	16	\$654.40	1.85%	16	\$612.50	1.84%
17	Trader Joe's	23	\$649.70	1.83%	23	\$615.10	1.85%
18	Shoppers	22	\$620.30	1.75%	20	\$566.50	1.71%
19	Wawa	81	\$526.78	1.49%	77	\$503.00	1.51%
20	Sam's Club	11	\$513.40	1.45%	11	\$483.50	1.46%
		2,168	\$31,532.37	89.04%	2,132	\$29,537.29	88.93%

Chart lists the top 20 retailers in the Balt-Wash market which sell groceries, HBC, drugs, GM and tobacco products. Volumes listed include 100% of store sales for supermarkets, c-stores and drug chains. Sales for club stores, Target and Walmart are extrapolated to include comparable categories, as explained in the formula on page 87. Petroleum sales are not included. Counties/cities included are: Washington, DC; Anne Arundel, Balt. City, Baltimore, Calvert, Carroll, Charles, Frederick, Harford, Howard, Montgomery, Prince George's and Queen Anne's in MD; Arlington, Clarke, Culpeper, Fairfax, Fauquier, King George, Loudoun, Pr. William, Spotsylvania, Stafford and Warren and independent cities of Alexandria, Fairfax, Falls Church and Fredericksburg in VA. () Alternate banner. **Total food sales for the area are: \$35.41 billion.** Source: Food World, June 2023

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Lofland Is New Albertsons M-A President



Tom Lofland



Jim Perkins



Jay Habben

from page 1

has been a store manager, grocery sales manager and division VP in Florida, Texas, Idaho, Minnesota, Virginia and Illinois.

In 2015, shortly after Albertsons acquired Safeway, Lofland was named VP-merchandising and marketing for Safeway's Eastern division based in Lanham, MD. Three years later he was promoted to Eastern division president. In 2020, when Albertsons created its expanded Mid-Atlantic division (which now includes the Safeway, Acme, Kings and Balducci's banners), Lofland relocated to Malvern to become senior VP-merchandising and marketing for the division. As the de facto chief merchant of a division which encompasses more than 300 stores and amassed more than \$7 billion in sales last year, Lofland oversaw all merchandising, procurement, marketing and advertising decisions for Albertsons' second largest

business unit.

Those responsibilities now will be supervised by Habben, who first joined Albertsons in 1994 in its Seattle division. Habben had primarily worked for the company on the West Coast and Midwest before he relocated to the East Coast in 2015 when he became Safeway's assistant sales and merchandising manager for produce and then moved to Malvern as sales and merchandising manager for special projects when the new Mid-Atlantic division was created in 2020. Over the past two years, Habben served as merchandising and marketing lead for Kings and Balducci's (which Albertsons acquired in early 2021) and has been director of merchandising for the division since October 2021.

"Jay played an instrumental role in facilitating the seamless merger between Acme and Safeway Eastern. His leadership, agility and commitment were fundamental to this integration process," said Lofland. "Addi-

tionally, Jay has been instrumental in leading Kings and Balducci's through a system conversion and source of supply change. His attention to detail and planning made this one of the smoothest transitions in our company."

As for Perkins, he will now pilot the potential standalone public firm that could be established to run stores not sold or divested if the Kroger-Albertsons merger is completed. At this point, the SpinCo job involves more planning than action since SpinCo would only be officially created if needed. However, as part of its proposed merger, Kroger and Albertsons agreed to establish SpinCo in order to help obtain FTC approval of the merger. The initial announcement said that SpinCo would consist of 100-375 stores. Moreover, in an internal memo, Albertsons said that it was "required by our merger agreement to be preparing SpinCo to make sure it can be set up smoothly and quickly if needed."

TAKING STOCK

from page 18

ed all retailers, but maybe because more is expected from this high-gloss merchant, the small cracks are more evident. Much like Safeway, Harris Teeter could have a different look in the near future if the Kroger-Albertsons deal is approved by the Federal Trade Commission (although I would expect more Safeway locations to be divested than HT stores). After opening multiple units per year for a 20-year period starting in the late 1990s, the company's B-W expansion effort has slowed and of the three stores listed on its new store agenda - Florida Avenue in DC; Kent Island, MD; and a replacement store in the Ballston area of Falls Church, VA - only the latter seems likely. HT is still a very well-run company, but perhaps not as well-run as it once was.

Wegmans - After struggling through the early part of COVID when many service departments had to be closed or modified, the Rochester, NY uber-retailer has hit its stride once again. Comp store sales were very strong and the high-volume regional chain's share was bolstered by the opening of three new stores - Wisconsin Avenue NW (which is humming); in the Carlisle section of Alexandria, VA (struggling a bit by Wegmans' standards); and in Reston, VA (which is doing OK). After a five-year run which saw much of the company's store opening pipeline focused on the B-W market, there's only one store left on the local checklist (in Rockville, MD which will probably open next year). One of Wegmans' hidden strengths is that despite the labor issues that impact all food retailers, the family-owned retailer has done an excellent job of executing and maintaining a high level of customer service at store level.

Shoppers - From near-death status, Shoppers has reawakened to some degree this year, opening four stores and remodeling several others. Granted, some of those stores once traded under the Shoppers banner (before they were sold and reacquired), but you've got to give the retail unit of UNFI credit. General manager Jeff Bleichner has done an excellent job without a lot of corporate cap-ex support and the once powerful discounter has another new store slated to open in Waldorf, MD next month (another former Shoppers store that was sold to McKay's). I'm still not totally certain that UNFI will continue to support their smallest retail division in the long-term but give the company props for reversing the negative momentum of the past decade.

Amazon Fresh - I don't care how many people tell me to never count out Amazon, this turkey will never fly. A trainwreck from the beginning, CEO Andy Jassy's "pause" announcement seems like a precursor for a death sentence.

Jim Perkins Shift Could Be One Of Several Moves Albertsons Makes To Prepare For Potential Merger

While the ultimate decision if the FTC approves the Kroger-Albertsons merger is likely 10-16 months away, both retailers have taken a more aggressive posture in recent weeks when it comes to promoting the benefits of the \$24.6 billion transaction.

Perhaps this was a preordained strategy, but I believe that at least part of the uptick in action comes from the loud backlash both retailers have felt from several interested and important parties. At some point, the harsh criticism merits a level of counter-response.

After staying silent for nearly six months (except to fight legal action by several states to nullify the deal and stop Albertsons' \$4 billion special dividend), both chains are fighting back.

Recently, Rodney McMullen and Vivek Sankaran, CEOs of Kroger and Albertsons respectively, wrote an op-ed piece in *The Cincinnati Enquirer* defending the deal, noting that no frontline workers would be laid off and that all stores, even ones that are divested (and presumably unsold), would remain open. They also touted that their business strategy is to lower prices and expand product selection.

About two weeks later in an interview with Bloomberg, McMullen went

TAKING STOCK continues on page 45

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IN REVIEW: HARRIS TEETER

State	County	2023 Stores	2023 Sales (in millions)	2023 County Food Sales	% of 2023 County Market	2022 Stores	2022 Sales (in millions)	% of 2022 County Market
DC	Washington	3	\$166.50	\$2,617.30	6.36%	3	\$160.80	6.49%
DC Recap: 3 stores with sales of \$166.5 million. Total retail food sales for DC in the study: \$2.62 billion. Harris Teeter share of DC is 6.36%.								
DE	Sussex	2	\$42.80	\$1,078.40	3.97%	2	\$40.20	4.01%
DE Recap: 2 stores with sales of \$42.8 million. Total retail food sales for DE in the study: \$1.64 billion. Harris Teeter share of DE is 2.61%.								
MD	Anne Arundel	1	\$38.20	\$2,491.60	1.53%	1	\$36.10	1.55%
MD	Baltimore City	2	\$86.70	\$1,581.30	5.48%	2	\$82.00	5.36%
MD	Calvert	1	\$23.50	\$423.20	5.55%	1	\$21.40	5.37%
MD	Howard	3	\$121.60	\$1,270.20	9.57%	3	\$113.20	9.41%
MD	Montgomery	7	\$196.20	\$3,963.80	4.95%	7	\$185.10	4.92%
MD	Prince George's	2	\$42.60	\$3,422.70	1.24%	2	\$40.40	1.25%
MD	St. Mary's	1	\$31.10	\$375.20	8.29%	1	\$27.40	7.00%
MD	Talbot	1	\$28.20	\$243.80	11.57%	1	\$26.40	11.59%
MD Recap: 18 stores with sales of \$568.1 million. Total retail food sales for MD in the study: \$22.75 billion. Harris Teeter share of MD is 2.5%.								
VA	Albemarle	3	\$78.30	\$699.10	11.20%	3	\$74.60	11.01%
VA	Arlington	6	\$280.70	\$1,054.20	26.63%	6	\$265.70	27.59%
VA	Chesapeake City	3	\$82.30	\$947.50	8.69%	3	\$77.90	8.79%
VA	Fairfax	10	\$402.40	\$6,001.60	6.70%	10	\$382.50	6.98%
VA	Fauquier	1	\$20.10	\$190.00	10.58%	1	\$19.20	10.19%
VA	Hampton/Newport News	2	\$43.20	\$1,331.60	3.24%	2	\$40.90	3.07%
VA	James City	3	\$109.70	\$452.50	24.24%	3	\$104.60	24.54%
VA	Loudoun	9	\$253.50	\$1,629.40	15.56%	9	\$240.50	15.66%
VA	Norfolk City	3	\$73.20	\$841.80	8.70%	3	\$69.90	8.84%
VA	Portsmouth City	1	\$25.80	\$298.30	8.65%	1	\$24.30	8.78%
VA	Prince William	4	\$139.80	\$2,149.40	6.50%	4	\$133.70	6.90%
VA	Suffolk City	1	\$28.90	\$332.20	8.70%	1	\$27.40	8.87%
VA	Virginia Beach	9	\$213.70	\$1,801.80	11.86%	9	\$202.30	11.93%
VA Recap: 55 stores with sales of \$1.75 billion. Total retail food sales for VA in the study: \$26.27 billion. Harris Teeter share of VA is 6.67%.								

Mid-Atlantic Recap: 78 stores with sales of \$2.53 billion annually. Mid-Atlantic retail food sales total: \$60.6 billion.

Harris Teeter Per Store Average: \$32.42 million

Source: Food World, June 2023

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IN REVIEW: GIANT FOOD

State	County	2023 Stores	2023 Sales (in millions)	2023 County Food Sales	% of 2023 County Market	2022 Stores	2022 Sales (in millions)	% of 2022 County Market
DC	Washington	7	\$292.40	\$2,617.30	11.17%	7	\$279.80	11.29%
DC Recap: 7 stores with sales of \$292.4 million. Total retail food sales for DC in the study: \$2.62 billion. Giant Food share of DC is 11.17%.								
DE	Sussex	3	\$183.70	\$1,078.40	17.03%	3	\$174.93	17.46%
DE Recap: 3 stores with sales of \$183.7 million. Total retail food sales for DE in the study: \$1.64 billion. Giant Food share of DE is 11.21%.								
MD	Anne Arundel	9	\$457.50	\$2,491.60	18.36%	9	\$434.38	18.66%
MD	Baltimore City	8	\$341.60	\$1,581.30	21.60%	7	\$284.71	18.61%
MD	Baltimore County	14	\$600.90	\$3,629.50	16.56%	14	\$570.46	16.53%
MD	Calvert	3	\$153.60	\$423.20	36.29%	3	\$147.77	37.09%
MD	Carroll	1	\$43.20	\$720.30	6.00%	1	\$40.45	5.87%
MD	Charles	2	\$89.20	\$564.80	15.79%	2	\$85.59	16.30%
MD	Frederick	3	\$128.50	\$1,015.20	12.66%	3	\$122.26	12.64%
MD	Harford	2	\$84.10	\$1,113.40	7.55%	2	\$80.00	7.72%
MD	Howard	7	\$286.70	\$1,270.20	22.57%	7	\$272.95	22.69%
MD	Montgomery	26	\$1,054.20	\$3,963.80	26.60%	26	\$1,007.22	26.75%
MD	Prince George's	17	\$632.10	\$3,422.70	18.47%	17	\$604.67	18.76%
MD	St. Mary's	1	\$38.90	\$375.20	10.37%	1	\$35.34	9.03%
MD	Talbot	1	\$38.50	\$243.80	15.79%	1	\$36.36	15.96%
MD Recap: 94 stores with sales of \$3.95 billion. Total retail food sales for MD in the study: \$22.75 billion. Giant Food share of MD is 17.36%.								
VA	Albemarle	1	\$37.10	\$699.10	5.31%	1	\$35.22	5.20%
VA	Arlington	4	\$117.40	\$1,054.20	11.14%	4	\$111.98	11.63%
VA	Fairfax	29	\$1,051.60	\$6,001.60	17.52%	29	\$1,001.13	18.27%
VA	Fauquier	1	\$32.90	\$190.00	17.32%	1	\$30.81	16.35%
VA	Loudoun	9	\$262.50	\$1,629.40	16.11%	9	\$249.03	16.21%
VA	Prince William	8	\$229.60	\$2,149.40	10.68%	8	\$218.27	11.27%
VA	Spotsylvania	2	\$96.70	\$856.60	11.29%	2	\$91.58	11.13%
VA	Stafford	3	\$124.10	\$441.60	28.10%	3	\$117.70	26.88%
VA Recap: 57 stores with sales of \$1.95 billion. Total retail food sales for VA in the study: \$26.27 billion. Giant Food share of VA is 7.43%.								
Mid-Atlantic Recap: 161 stores with sales of \$6.38 billion annually. Mid-Atlantic retail food sales total: \$60.6 billion.								
Giant Food Per Store Average: \$39.61 million								

Source: Food World, June 2023



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IN REVIEW: COSTCO

State	County	2023 Stores	2023 Sales (in millions)	2023 County Food Sales	% of 2023 County Market	2022 Stores	2022 Sales (in millions)	% of 2022 County Market
DC	Washington	1	\$70.80	\$2,617.30	2.71%	1	\$66.10	2.67%
DC Recap: 1 store with sales of \$70.8 million. Total retail food sales for DC in the study: \$2.62 billion. Costco share of DC is 2.71%.								
MD	Anne Arundel	2	\$126.50	\$2,491.60	5.08%	2	\$117.20	5.03%
MD	Baltimore County	2	\$134.90	\$3,629.50	3.72%	2	\$126.80	3.68%
MD	Frederick	1	\$59.20	\$1,015.20	5.83%	1	\$55.40	5.73%
MD	Howard	1	\$64.90	\$1,270.20	5.11%	1	\$60.10	5.00%
MD	Montgomery	2	\$190.60	\$3,963.80	4.81%	2	\$175.40	4.66%
MD	Prince George's	3	\$196.50	\$3,422.70	5.74%	3	\$180.20	5.59%
MD Recap: 11 stores with sales of \$772.6 million. Total retail food sales for MD in the study: \$22.75 billion. Costco share of MD is 3.4%.								
PA	Dauphin	1	\$58.30	\$1,104.00	5.28%	1	\$54.80	5.14%
PA	Lancaster	1	\$35.40	\$1,889.90	1.87%	1	\$33.70	1.82%
PA Recap: 2 stores with sales of \$93.7 million. Total retail food sales for PA in the study: \$7.31 billion. Costco share of PA is 1.28%.								
VA	Albemarle	1	\$43.30	\$699.10	6.19%	1	\$40.40	5.96%
VA	Arlington	1	\$78.30	\$1,054.20	7.43%	1	\$73.40	7.62%
VA	Chesterfield	1	\$49.30	\$1,688.50	2.92%	1	\$52.30	3.49%
VA	Fairfax	4	\$414.50	\$6,001.60	6.91%	4	\$384.20	7.01%
VA	Frederick	1	\$61.30	\$544.60	11.26%	1	\$58.70	11.24%
VA	Hampton/Newport News	1	\$42.60	\$1,331.60	3.20%	1	\$40.20	3.01%
VA	Henrico	1	\$51.30	\$2,024.70	2.53%	1	\$48.40	2.46%
VA	Loudoun	2	\$175.80	\$1,629.40	10.79%	2	\$163.40	10.64%
VA	Norfolk City	1	\$51.30	\$841.80	6.09%	1	\$48.30	6.11%
VA	Prince William	2	\$90.60	\$2,149.40	4.22%	2	\$84.50	4.36%
VA	Spotsylvania	1	\$36.20	\$856.60	4.23%	1	\$34.40	4.18%

VA Recap: 16 stores with sales of \$1.09 billion. Total retail food sales for VA in the study: \$26.27 billion. Costco share of VA is 4.17%.

Mid-Atlantic Recap: 30 stores with sales of \$2.03 billion annually. Mid-Atlantic retail food sales total: \$60.6 billion.

Costco Per Store Average: \$67.72 million

Source: Food World, June 2023



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TAKING STOCK

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on the offensive again noting, “Usually you wouldn’t commit in advance to litigate. In this case we both committed to litigate in advance,” emphasizing that regulators haven’t indicated opposition to the proposed transaction at this time. He added that discussions with the FTC were continuing and the deal’s progress is “where we thought we would be at this time.”

“We believe very strongly that we had the best professional advisers, and Albertsons had the best professional advisers, on being able to find a viable solution,” McMullen stated. A successful outcome would mean that “the combined company will create the right environment and lower prices, and we’ll be able to divest stores to somebody that’s good.”

In my opinion, the “play offense” strategy is a good one that’s been long overdue to defend critics of the deal.

The pushback against the deal has been present from the day the two chains announced their intent to join forces in mid-October 2022. Several states’ attorneys general (mainly in the West) tabbed the deal as anti-competitive (and therefore anti-consumer). A month later, several U.S. senators voiced their opposition to the deal, and the food industry’s largest labor union – the UFCW International – decried that such a marriage would cost jobs and lower wages.

In recent weeks, the UFCW has doubled down on that narrative by officially rejecting the merger at their conference earlier this month.

“For months, the UFCW has called for transparency, engaged independent experts and assessed the publicly available information on this proposed merger to determine the widespread impact it will have on our members and the communities they serve. At our 9th Regular Convention, hundreds of UFCW delegates representing our entire union from around the country came together to unanimously declare mergers pose a serious threat to the livelihoods of our members, and we must act to confront them,” UFCW International president Marc Perrone said in a statement. “Given the lack of transparency, and the impact a merger between two of the largest supermarket companies could have on essential workers and the communities and customers they serve, the UFCW stands united in its opposition to the proposed Kroger and Albertsons merger.”

A few days earlier, a report by Washington, DC-based think tank the Economic Policy Institute (EPI) said that if the merger were approved it would reduce the number of outside employment options available to workers, lowering grocery store workers’ annual wages by a total of \$334 million – about a \$450 loss in annual wages per worker.

“Workers’ ability to negotiate better pay and working conditions rests on their capacity to switch jobs. By decreasing the number of outside options available to workers, the merger will limit competition for hiring and retaining employees, and grocery store worker earnings will fall as a result. Crucially, the wage effects we identify are solely driven by this increase in labor market concentration. If the merger also leads to layoffs or hours cuts, this would add another dimension of damage to affected workers.

“Our analysis uses grocery store employment and earnings data and the specific locations of Kroger and Albertsons stores. We find that: the merger will lower wages for 746,000 grocery store workers in over 50 metropolitan areas of the U.S. Increased concentration will suppress wages for all grocery store workers in affected cities – not only those workers currently employed by Kroger or Albertsons,” the report noted.

I’m certain that Messrs. McMullen and Sankaran find the EPI report to be misleading, if not inaccurate. And as several of our readers have pointed out, a significant portion of the EPI’s annual funding comes from labor unions.

And on June 12, the International Brotherhood of Teamsters, where 22,000 of its members work for Kroger or Albertsons, said it would also oppose the merger citing potential job security issues.

And how does this all potentially affect Jim Perkins’ shift to Albertsons headquarters in Boise?

For me, that answer is fairly fundamental. As stated above, the external media defense of the big merger by both chains is relatively new, but the internal planning of the deal was likely done at least a month before the announcement of the potential deal in October.

TAKING STOCK continues on page 55



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Aldi	4	Charlotte Hall, MD; Cockeysville, MD; Fort Washington, MD*; Gaithersburg, MD
Amazon Fresh	10	Washington, DC (3 – H St., First St., Dupont Circle); Chevy Chase, MD (Connecticut Ave.); Gaithersburg, MD; White Oak, MD; Arlington, VA; Bailey's Crossroads, VA; Falls Church, VA; Springfield, VA (see footnote)
The Fresh Market	1	Crofton, MD
Giant Food	1	Baltimore, MD (Perring Parkway)
Global Food Market	1	Baltimore, MD (Security Blvd.)*
Grocery Outlet	3	Baltimore, MD (Milford Mill); Edgewood, MD*; Sykesville, MD
Harris Teeter	3	Washington, DC (Howard Univ.); Kent Island, MD; Falls Church, VA (r)
Kroger	1	Mechanicsville, VA (r)
Lidl	6	Washington, DC (2 - Upton Place, Columbia Heights*); Bear, DE; Bethesda, MD; Hyattsville, MD; Chantilly, VA*
MOM's Organic Market	2	Washington, DC (Van Ness); Silver Spring, MD
Publix	4	Norfolk, VA; Spotsylvania, VA; Suffolk, VA; Virginia Beach, VA
Shoppers Food	3	California, MD*; Leonardtown, MD*; Waldorf, MD
Sprouts	3	Burtonsville, MD; Westminster, MD; Manassas, VA*
Streets Market	1	Washington, DC (P St. & 27th NW)
Target	1	Chantilly, VA
Trader Joe's	2	Arlington, VA (Crystal City); Springfield, VA (r)
Wegmans	1	Rockville, MD
Weis Markets	3	Clarksburg, MD; New Market, MD; Waldorf, MD
Whole Foods	6	Washington, DC (12th St. NW)*; Frederick, MD; Falls Church, VA (E. Broad St. & N. Washington); Reston, VA (r); Springfield, VA (r); Woodbridge, VA

Footnote: These stores remain under active lease, although it is our belief they will not open anytime in the next 2 years, if ever.

(r) - replacement store

(e) - store expansion

* Store opened between 4/1/23 - 6/30/23

Source: *Food World*, June 2023

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MARYLAND COUNTY SHARE OF MARKET: 2023

Total sales for those Maryland counties included in this study are \$22.75 billion

Rank	Company	Stores	Sales (in millions)	% of Market
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ANNE ARUNDEL COUNTY (\$2.5 billion)
(Includes Annapolis, Brooklyn Park, Glen Burnie, Linthicum)

- Population 593,286
- # of Households 218,682
- Median Income \$108,048
- Under age 18 22.3%
- Over age 65 15.4%
- Female 50.3%
- White 65.1%
- Black 19.1%
- Hispanic 9.0%
- Asian 4.5%

1	Giant Food	9	\$457.50	18.36%
2	Albertsons (Safeway)	8	\$240.40	9.65%
3	Walmart (SuperCenter)	4	\$164.30	6.59%
4	Costco	2	\$126.50	5.08%
5	CVS	22	\$123.80	4.97%
6	Sam's Club	3	\$113.40	4.55%
7	Target	5	\$111.60	4.48%
8	7-Eleven	44	\$96.20	3.86%
9	Wegmans	1	\$92.60	3.72%
10	Shoppers	2	\$72.90	2.93%
11	Food Lion	5	\$71.20	2.86%
12	Military Commissaries	2	\$70.44	2.83%
13	Aldi	7	\$68.00	2.73%
14	Walgreens	16	\$65.60	2.63%
15	C&S Independents	8	\$60.78	2.44%
16	Wawa	8	\$56.06	2.25%
17	Whole Foods	1	\$55.80	2.24%
18	Weis Markets	3	\$48.96	1.97%
19	Royal Farm Stores	20	\$47.70	1.91%
20	BJ's Wholesale Club	1	\$45.80	1.84%
21	B. Green (Green Valley)	2	\$43.00	1.73%
22	Harris Teeter	1	\$38.20	1.53%
23	International Markets	2	\$33.50	1.34%
24	Geresbeck's Food Market	2	\$22.10	0.89%
25	Graul's	2	\$21.90	0.88%
26	Trader Joe's	1	\$21.80	0.87%
27	Sprouts	1	\$18.50	0.74%
28	The Fresh Market	1	\$17.20	0.69%
29	Great Valu	1	\$16.30	0.65%
30	Lidl	2	\$15.10	0.61%
31	Dash-In	9	\$14.60	0.59%
32	High's/Baltimore	7	\$11.60	0.47%
33	Rite Aid	3	\$10.10	0.41%
34	Save A Lot	1	\$5.00	0.20%
		206	\$2,478.44	99.47%



BALTIMORE CITY (\$1.6 billion)

- Population 569,931
- # of Households 244,893
- Median Income \$54,124
- Under age 18 20.3%
- Over age 65 15.0%
- Female 53.1%
- White 27.6%
- Black 62.4%
- Hispanic 6.0%
- Asian 2.8%

1	Giant Food	8	\$341.60	21.60%
2	Walgreens	19	\$140.90	8.91%
3	B. Green (Food Depot)	4	\$99.80	6.31%
4	7-Eleven	44	\$99.60	6.30%
5	CVS	16	\$95.70	6.05%
6	Albertsons (Safeway)	3	\$92.70	5.86%
7	Harris Teeter	2	\$86.70	5.48%
8	Save A Lot	8	\$86.50	5.47%
9	Whole Foods	2	\$63.50	4.02%
10	Royal Farm Stores	24	\$60.80	3.84%
11	International Markets	6	\$48.70	3.08%
12	Rite Aid	10	\$48.50	3.07%
13	Shoppers	2	\$40.80	2.58%
14	BJ's Wholesale Club	1	\$37.50	2.37%
15	ShopRite (Klein's)	1	\$27.10	1.71%
16	Aldi	4	\$26.90	1.70%
17	Streets Market	3	\$26.10	1.65%
18	Target	1	\$23.20	1.47%
19	Sprouts	1	\$18.30	1.16%
20	MOM's Organic Market	1	\$16.10	1.02%
21	Wawa	2	\$16.05	1.01%
22	Eddie's of Roland Park	1	\$11.40	0.72%
23	Lidl	1	\$10.90	0.69%
24	Circle K	2	\$4.30	0.27%
25	Dash-In	1	\$2.80	0.18%
26	High's/Baltimore	1	\$2.50	0.16%
		168	\$1,528.95	96.69%



BALTIMORE COUNTY (\$3.6 billion)

(Includes Catonsville, Dundalk, Randallstown, Reisterstown)

- Population 846,161
- # of Households 326,932
- Median Income \$81,846
- Under age 18 21.8%
- Over age 65 17.9%
- Female 52.5%
- White 54.2%
- Black 31.3%
- Hispanic 6.2%
- Asian 6.5%

1	Giant Food	14	\$600.90	16.56%
2	Walmart (SuperCenter)	9	\$367.50	10.13%
3	Weis Markets	12	\$276.91	7.63%
4	Sam's Club	3	\$208.40	5.74%
5	Albertsons (Safeway)	7	\$175.10	4.82%

See MARYLAND COUNTY SHARE on page 50

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MARYLAND COUNTY SHARE OF MARKET: 2023

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6	Walgreens	27	\$172.40	4.75%
7	Wegmans	2	\$171.50	4.73%
8	CVS	26	\$156.50	4.31%
9	International Markets	9	\$148.60	4.09%
10	Royal Farm Stores	51	\$144.30	3.98%
11	Costco	2	\$134.90	3.72%
12	Target	6	\$112.30	3.09%
13	7-Eleven	44	\$111.70	3.08%
14	ShopRite (PR/Klein's/Village)	4	\$110.02	3.03%
15	Shoppers	3	\$84.20	2.32%
16	BJ's Wholesale Club	2	\$78.50	2.16%
17	Aldi	11	\$76.20	2.10%
18	Food Lion	6	\$64.20	1.77%
19	Wawa	8	\$58.01	1.60%
20	Lidl	6	\$43.20	1.19%
21	Trader Joe's	2	\$37.40	1.03%
22	Graul's	3	\$35.30	0.97%
23	Whole Foods	1	\$33.10	0.91%
24	MOM's Organic Market	2	\$32.50	0.90%
25	Rite Aid	6	\$29.60	0.82%
26	Eddie's of Roland Park	1	\$28.60	0.79%
27	The Fresh Market	2	\$26.30	0.72%
28	Redner's Markets	1	\$25.70	0.71%
29	Sprouts	1	\$20.80	0.57%
30	High's/Baltimore	8	\$15.40	0.42%
31	Geresbeck's Food Market	1	\$13.50	0.37%
32	C&S Independents	3	\$12.22	0.34%
33	Dash-In	2	\$6.30	0.17%
34	Save A Lot	2	\$6.30	0.17%
35	Circle K	2	\$5.40	0.15%
36	ASG	1	\$2.00	0.06%
		290	\$3,625.76	99.90%




CALVERT COUNTY (\$423.3 million)
(Includes Dunkirk, Prince Frederick, Solomons)

- Population 94,573
- # of Households 32,751
- Median Income \$120,295
- Under age 18 23.2%
- Over age 65 15.8%
- Female 50.2%
- White 76.4%
- Black 13.7%
- Hispanic 4.8%
- Asian 2.0%

1	Giant Food	3	\$153.60	36.29%
2	Albertsons (Safeway)	2	\$70.60	16.68%
3	Walmart (SuperCenter)	2	\$64.90	15.34%


4	Weis Markets	3	\$46.19	10.91%
5	Harris Teeter	1	\$23.50	5.55%
6	Wawa	2	\$16.16	3.82%
7	7-Eleven	7	\$15.10	3.57%
8	CVS	3	\$14.80	3.50%
9	Walgreens	2	\$11.90	2.81%
10	Dash-In	2	\$4.70	1.11%
		27	\$421.45	99.59%



CAROLINE COUNTY (\$100.7 million)
(Includes Denton, Federalsburg, Greensboro)

- Population 33,433
- # of Households 11,963
- Median Income \$63,027
- Under age 18 23.7%
- Over age 65 17.0%
- Female 50.9%
- White 74.8%
- Black 13.9%
- Hispanic 8.1%
- Asian 1.2%

1	Walmart (SuperCenter)	1	\$43.20	42.90%
2	Food Lion	2	\$21.90	21.75%
3	Aldi	1	\$10.30	10.23%
4	Royal Farm Stores	3	\$9.10	9.04%
5	Walgreens	1	\$5.90	5.86%
6	Save A Lot	1	\$4.70	4.67%
7	7-Eleven	1	\$2.50	2.48%
8	Fas-Marts	1	\$2.30	2.28%
		11	\$99.90	99.21%



CARROLL COUNTY (\$720.3 million)
(Includes Eldersburg, Manchester, Taneytown, Westminster)

- Population 175,305
- # of Households 62,907
- Median Income \$104,708
- Under age 18 21.9%
- Over age 65 17.5%
- Female 50.1%
- White 87.3%
- Black 4.1%
- Hispanic 4.3%
- Asian 2.3%

1	Walmart (SuperCenter)	4	\$121.50	16.87%
2	Albertsons (Safeway)	3	\$101.60	14.11%
3	Weis Markets	5	\$97.32	13.51%
4	The Giant Co. (Martin's)	1	\$76.20	10.58%
5	BJ's Wholesale Club	1	\$45.80	6.36%
6	Food Lion	3	\$45.20	6.28%
7	Giant Food	1	\$43.20	6.00%
8	CVS	6	\$31.60	4.39%
9	Walgreens	4	\$21.30	2.96%
10	Shoppers	1	\$20.80	2.89%
11	Aldi	2	\$17.90	2.49%
12	Target	1	\$15.80	2.19%
13	Royal Farm Stores	4	\$14.10	1.96%

See MARYLAND COUNTY SHARE on page 52




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MARYLAND COUNTY SHARE OF MARKET: 2023

Continued from page 50

14	High's/Baltimore	8	\$13.10	1.82%
15	Rite Aid	3	\$11.90	1.65%
16	Wawa	2	\$11.57	1.61%
17	IGA	1	\$10.92	1.52%
18	Sheetz	3	\$10.10	1.40%
19	7-Eleven	3	\$7.20	1.00%
		56	\$717.11	99.56%

7	Sam's Club	1	\$36.10	6.37%
8	7-Eleven	12	\$35.20	6.22%
9	Target	2	\$30.20	5.33%
10	Wawa	3	\$19.56	3.45%
11	Dash-In	10	\$18.40	3.25%
12	Walgreens	3	\$16.20	2.86%
13	MOM's Organic Market	1	\$13.90	2.45%
14	Weis Markets	1	\$12.56	2.22%
15	Aldi	2	\$10.30	1.82%
16	Lidl	1	\$7.90	1.40%
		55	\$561.12	99.09%



CECIL COUNTY (\$317.2 million) (Includes Elkton, Northeast)

• Population	104,942	• Female	50.1%
• # of Households	38,672	• White	83.7%
• Median Income	\$81,817	• Black	7.8%
• Under age 18	22.3%	• Hispanic	4.9%
• Over age 65	16.7%	• Asian	1.5%

1	The Giant Co. (Martin's)	1	\$61.40	19.36%
2	Walmart (SuperCenter)	2	\$61.40	19.36%
3	Food Lion	3	\$35.20	11.10%
4	Redner's Markets	1	\$26.90	8.48%
5	Wawa	3	\$26.77	8.44%
6	Albertsons (Acme)	1	\$23.40	7.38%
7	Royal Farm Stores	8	\$19.20	6.05%
8	Walgreens	3	\$14.10	4.45%
9	Aldi	1	\$9.10	2.87%
10	High's/Baltimore	4	\$8.80	2.77%
11	7-Eleven	3	\$8.70	2.74%
12	Grocery Outlet	1	\$7.30	2.30%
13	CVS	1	\$5.20	1.64%
14	Rite Aid	1	\$4.00	1.26%
15	Fas-Marts	1	\$2.20	0.69%
		34	\$313.67	98.89%



DORCHESTER COUNTY (\$64.6 million) (Includes Cambridge)

• Population	32,726	• Female	52.5%
• # of Households	13,123	• White	62.1%
• Median Income	\$55,652	• Black	29.2%
• Under age 18	21.0%	• Hispanic	6.2%
• Over age 65	22.5%	• Asian	1.1%

1	Walmart (SuperCenter)	1	\$28.20	43.65%
2	Food Lion	1	\$13.50	20.90%
3	Wawa	1	\$8.01	12.40%
4	Walgreens	1	\$5.80	8.98%
5	Rite Aid	1	\$4.50	6.97%
6	Royal Farm Stores	1	\$3.10	4.80%
		6	\$63.11	97.69%



FREDERICK COUNTY (\$1.0 billion) (Includes Brunswick, Emmitsburg, Frederick, Thurmont)

• Population	287,079	• Female	50.5%
• # of Households	97,615	• White	69.3%
• Median Income	\$106,129	• Black	11.6%
• Under age 18	23.3%	• Hispanic	11.3%
• Over age 65	15.1%	• Asian	5.7%

1	Weis Markets	6	\$144.90	14.27%
2	Giant Food	3	\$128.50	12.66%
3	Walmart (SuperCenter)	2	\$118.60	11.68%
4	Wegmans	1	\$76.40	7.53%
5	Food Lion	5	\$75.00	7.39%
6	CVS	12	\$68.70	6.77%
7	Costco	1	\$59.20	5.83%
8	Giant Eagle (GetGo)	4	\$42.30	4.17%
9	Albertsons (Safeway)	2	\$36.80	3.62%
10	Sam's Club	1	\$34.80	3.43%
11	Sheetz	9	\$34.10	3.36%
12	Walgreens	5	\$28.80	2.84%
13	7-Eleven	14	\$23.70	2.33%



CHARLES COUNTY (\$566.3 million) (Includes Bryan's Road, Waldorf)

• Population	170,102	• Female	51.6%
• # of Households	58,138	• White	34.7%
• Median Income	\$107,808	• Black	52.0%
• Under age 18	24.0%	• Hispanic	7.0%
• Over age 65	13.3%	• Asian	3.5%

1	Albertsons (Safeway)	3	\$101.00	17.84%
2	Giant Food	2	\$89.20	15.75%
3	Walmart (SuperCenter)	2	\$45.20	7.98%
4	Food Lion	3	\$43.50	7.68%
5	CVS	8	\$41.80	7.38%
6	BJ's Wholesale Club	1	\$40.10	7.08%

See MARYLAND COUNTY SHARE on page 54

THANK YOU

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MARYLAND COUNTY SHARE OF MARKET: 2023

Continued from page 52

14	Aldi	2	\$21.80	2.15%
15	Royal Farm Stores	6	\$21.60	2.13%
16	Target	1	\$17.10	1.68%
17	International Markets	1	\$13.90	1.37%
18	MOM's Organic Market	1	\$12.70	1.25%
19	Wawa	3	\$12.30	1.21%
20	Rutter's Farm Stores	3	\$11.70	1.15%
21	Military Commissaries	1	\$8.75	0.86%
22	Lidl	1	\$8.50	0.84%
23	High's/Baltimore	4	\$6.40	0.63%
24	C&S Independents	2	\$2.72	0.27%
25	Circle K	1	\$2.10	0.21%
26	Dash-In	1	\$1.90	0.19%
		92	\$1,013.27	99.81%


23	Save A Lot	1	\$5.80	0.52%
24	Sheetz	1	\$3.40	0.31%
25	C&S Independents	1	\$0.18	0.02%
		109	\$1,111.21	99.80%



HOWARD COUNTY (\$1.3 billion)
(Includes Columbia, Ellicott City, Laurel)

- Population 335,411
- # of Households 118,037
- Median Income \$129,549
- Under age 18 24.1%
- Over age 65 14.7%
- Female 50.8%
- White 48.6%
- Black 20.8%
- Hispanic 7.6%
- Asian 20.2%

1	Giant Food	7	\$286.70	22.57%
2	Harris Teeter	3	\$121.60	9.57%
3	Wegmans	1	\$109.50	8.62%
4	Walmart (SuperCenter)	2	\$77.50	6.10%
5	Albertsons (Safeway)	3	\$77.20	6.08%
6	Costco	1	\$64.90	5.11%
7	Weis Markets	3	\$61.75	4.86%
8	International Markets	3	\$58.30	4.59%
9	CVS	9	\$45.60	3.59%
10	Target	2	\$45.50	3.58%
11	Whole Foods	1	\$43.00	3.39%
12	BJ's Wholesale Club	1	\$37.10	2.92%
13	Trader Joe's	1	\$30.10	2.37%
14	Walgreens	5	\$29.10	2.29%
15	B. Green (Green Valley)	1	\$24.95	1.96%
16	Food Lion	2	\$23.20	1.83%
17	7-Eleven	11	\$22.30	1.76%
18	Sprouts	1	\$20.70	1.63%
19	Royal Farm Stores	6	\$15.60	1.23%
20	MOM's Organic Market	1	\$15.10	1.19%
21	Aldi	1	\$12.80	1.01%
22	High's/Baltimore	8	\$12.50	0.98%
23	Roots Markets	1	\$12.20	0.96%
24	Lidl	1	\$8.80	0.69%
25	Rite Aid	1	\$4.80	0.38%
26	Circle K	2	\$4.20	0.33%
27	Dash-In	1	\$2.40	0.19%
		79	\$1,267.40	99.78%



HARFORD COUNTY (\$1.1 billion)
(Includes Aberdeen, Bel Air, Havre de Grace)

- Population 263,867
- # of Households 97,468
- Median Income \$98,495
- Under age 18 22.3%
- Over age 65 16.9%
- Female 50.8%
- White 74.0%
- Black 15.4%
- Hispanic 5.1%
- Asian 3.1%

1	ShopRite (Klein's)	6	\$240.10	21.56%
2	Walmart (SuperCenter)	3	\$98.70	8.86%
3	Wegmans	1	\$97.60	8.77%
4	Giant Food	2	\$84.10	7.55%
5	Wawa	10	\$68.94	6.19%
6	Walgreens	11	\$59.70	5.36%
7	Target	3	\$54.90	4.93%
8	Royal Farm Stores	17	\$50.20	4.51%
9	Weis Markets	2	\$49.69	4.46%
10	BJ's Wholesale Club	1	\$45.90	4.12%
11	CVS	8	\$36.80	3.31%
12	Redner's Markets	2	\$36.00	3.23%
13	Albertsons (Safeway)	1	\$32.10	2.88%
14	7-Eleven	18	\$28.80	2.59%
15	Aldi	4	\$21.20	1.90%
16	Family Owned Markets	1	\$20.80	1.87%
17	Sprouts	1	\$17.60	1.58%
18	Rite Aid	4	\$13.00	1.17%
19	Military Commissaries	1	\$12.80	1.15%
20	High's/Baltimore	7	\$12.30	1.10%
21	Food Lion	2	\$10.90	0.98%
22	Lidl	1	\$9.70	0.87%

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TAKING STOCK

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As you may recall, both parties laid out their game plan on how they would improve each organization if it were combined. Included on that checklist was a promise to invest more than \$1 billion in store improvements at Albertsons' nearly 2,300 supermarkets; expansion of private label items; improvement in customer experience; continued significant investment in associate benefits; and more streamlined synergies. Also included on the initial itinerary was a plan to establish an Albertsons subsidiary - SpinCo - to Albertsons Cos. shareholders immediately prior to the merger closing which would operate as a standalone public company. The original plan estimated that SpinCo would comprise between 100-375 stores that could not be sold after the divestiture amount is established by the FTC.

As for SpinCo, I'm skeptical that it will ever become a reality, but Kroger and Albertsons need to prepare to protect all of the nearly 5,000 supermarkets in the combined mix. And I expect other internal moves to be made by both merchants prior to the FTC ruling in 2024.

By moving Perkins out of his role of running Albertsons Mid-Atlantic division (a territory he has overseen successfully for most of the past decade), the company is sacrificing one of its top executives. However, in replacing Perkins with Tom Lofland, there won't be much of a learning curve. Lofland is extremely capable, knows the Albertsons system (he's been with the retailer for about 30 years) and was the president of Safeway's Eastern division in 2018-2020 (Albertsons acquired Safeway in 2015).

Objectively, Perkins is the right man for the SpinCo job, even if that newly conceived standalone business never comes to fruition. I dare say that nobody knows more about store operations than Jim Perkins. That one skill alone is a difference-maker when it comes to identifying a given store's strengths and weaknesses. Coupled with his strong people skills and his proven ability to serve as an Albertsons ambassador (he's moved more than 30 times in his career), Perkins will handle this new role with the professionalism and aplomb that have become his trademarks.

'Round The Trade

Just when you might be thinking that the FTC may be backing off its tenacious anti-business stance, comes word earlier this month that the agency is seeking both a temporary restraining order and injunction after suing to block Microsoft's proposed \$69 billion takeover effort of game developer Activision. The FTC voted to block the proposed acquisition several months ago, but now has taken the formal step of litigation because it believes that the two companies may consummate the deal at any time. Last month, the heavy hand of chairwoman Lina Khan arose again as the liberal-leaning agency voted to block a proposed \$27.8 billion acquisition by pharma giant Amgen to purchase another pharmaceutical firm Horizon Therapeutics. This, too, is likely to end up being challenged in court by both firms. Of course, those rulings only heighten the negative perception that a Kroger-Albertsons merger will get approved. If Khan and her acolytes reject the deal, I'm not certain that both retailers can afford another 18-24 months of litigation to seek the result they want. And even if Khan and her sycophants approve the deal, how many stores might have to be shed to make it palatable for both parties?...North Bethesda, MD-based Federal Realty Investment Trust (FRT) is suing Amazon, blaming "Godzilla" for defaulting on a lease for a long-delayed Amazon Fresh (AF) store opening in Willow Grove, PA in a shopping center owned by FRT. Amazon quickly countersued, charging that the landlord has not completed the necessary work to make the store ready to open. With more than 30 planned but unopened AF units the in the Mid-Atlantic alone, you can expect to see more litigation of this type. I also found it amusing that high-powered research firm Alliance Bernstein suggested that Amazon could accelerate its brick-and-mortar expansion by acquiring many of the divested stores in the Albertsons Kroger deal. First, Willie Wonka could conclude that. Second, before Amazon even thinks about expanding its physical store presence, maybe they should learn how to improve their current brick-and-mortar base...in a rarity, Wegmans will be closing a store due to underperformance. The Rochester, NY-based family-owned regional chain said it would close its Natick, MA location later this summer. The store opened in 2018 inside the

TAKING STOCK continues on page 67

AUTHENTIC ITALIAN *Sandwich Toppers*



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MARYLAND COUNTY SHARE OF MARKET: 2023

Continued from page 54



KENT COUNTY (\$103.5 million) (Includes Chestertown, Worton)

• Population	19,320	• Female	51.9%
• # of Households	8,291	• White	77.8%
• Median Income	\$64,541	• Black	14.3%
• Under age 18	15.5%	• Hispanic	4.9%
• Over age 65	27.0%	• Asian	1.4%

1	Redner's Markets	1	\$25.90	25.02%
2	Walgreens	2	\$22.40	21.64%
3	Albertsons (Safeway)	1	\$20.40	19.71%
4	Food Lion	1	\$16.10	15.56%
5	Royal Farm Stores	2	\$6.20	5.99%
6	C&S Independents	2	\$3.25	3.14%
7	7-Eleven	1	\$3.10	3.00%
8	High's/Baltimore	1	\$2.20	2.13%
9	Fas-Marts	1	\$2.10	2.03%
		12	\$101.65	98.21%



MONTGOMERY COUNTY (\$4.0 billion) (Includes Bethesda, Gaithersburg, Germantown, Rockville)

• Population	1,052,521	• Female	51.3%
• # of Households	383,308	• White	42.2%
• Median Income	\$117,345	• Black	20.4%
• Under age 18	22.9%	• Hispanic	20.1%
• Over age 65	16.6%	• Asian	16.0%

1	Giant Food	26	\$1,054.20	26.60%
2	Albertsons (Balducci's/Safeway)	19	\$529.70	13.36%
3	CVS	43	\$452.50	11.42%
4	International Markets	20	\$354.20	8.94%
5	Whole Foods (Amazon Fresh)	7	\$264.50	6.67%
6	Harris Teeter	7	\$196.20	4.95%
7	Costco	2	\$190.60	4.81%
8	7-Eleven	69	\$159.60	4.03%
9	Trader Joe's	5	\$148.70	3.75%
10	Target	6	\$134.20	3.39%
11	Wegmans	1	\$99.40	2.51%
12	Walgreens	13	\$78.30	1.98%
13	Aldi	8	\$74.30	1.87%
14	Sam's Club	1	\$46.30	1.17%
15	Walmart (SuperCenter)	1	\$40.00	1.01%
16	MOM's Organic Market	2	\$34.80	0.88%
17	Weis Markets	2	\$27.07	0.68%
18	Lidl	3	\$16.20	0.41%
19	Streets Market	1	\$13.80	0.35%
20	Food Lion	1	\$11.80	0.30%

21	Roots Markets	1	\$11.80	0.30%
22	The Fresh Market	1	\$9.80	0.25%
23	Military Commissaries	1	\$7.76	0.20%
24	Royal Farm Stores	1	\$4.30	0.11%
25	Circle K	1	\$2.40	0.06%
26	Dash-In	1	\$2.10	0.05%
27	C&S Independents	3	\$1.32	0.03%
		246	\$3,965.85	100.05%*



PRINCE GEORGE'S COUNTY (\$3.4 billion) (Includes Bowie, Clinton, College Park, Hyattsville, Laurel, Oxon Hill)

• Population	946,971	• Female	51.7%
• # of Households	337,366	• White	11.9%
• Median Income	\$91,124	• Black	64.1%
• Under age 18	22.1%	• Hispanic	20.4%
• Over age 65	14.5%	• Asian	4.4%

1	Giant Food	17	\$632.10	18.47%
2	International Markets	23	\$376.50	11.00%
3	Shoppers	11	\$309.40	9.04%
4	CVS	49	\$288.40	8.43%
5	Albertsons (Safeway)	9	\$280.30	8.19%
6	Target	9	\$236.50	6.91%
7	Costco	3	\$196.50	5.74%
8	7-Eleven	40	\$160.30	4.68%
9	Aldi	13	\$116.20	3.39%
10	Wegmans	1	\$98.30	2.87%
11	Walmart (SuperCenter)	4	\$88.60	2.59%
12	BJ's Wholesale Club	2	\$85.20	2.49%
13	Walgreens	12	\$72.80	2.13%
14	Royal Farm Stores	13	\$51.60	1.51%
15	Wawa	8	\$46.39	1.36%
16	Military Commissaries	1	\$43.03	1.26%
17	Lidl	5	\$42.80	1.25%
18	Harris Teeter	2	\$42.60	1.24%
19	Food Lion	3	\$42.30	1.24%
20	Weis Markets	3	\$38.27	1.12%
21	Whole Foods	1	\$34.90	1.02%
22	MOM's Organic Market	2	\$30.20	0.88%
23	Save A Lot	4	\$18.80	0.55%
24	Dash-In	8	\$18.20	0.53%
25	ASG	3	\$14.92	0.44%
26	Circle K	1	\$1.90	0.06%
27	C&S Independents	1	\$0.19	0.01%
		248	\$3,367.20	98.38%

See MARYLAND COUNTY SHARE on page 58



OUR PURPOSE IS TO
Protect & Restore
THE ENVIRONMENT



Weed Warrior Volunteering to Remove Invasive Plants



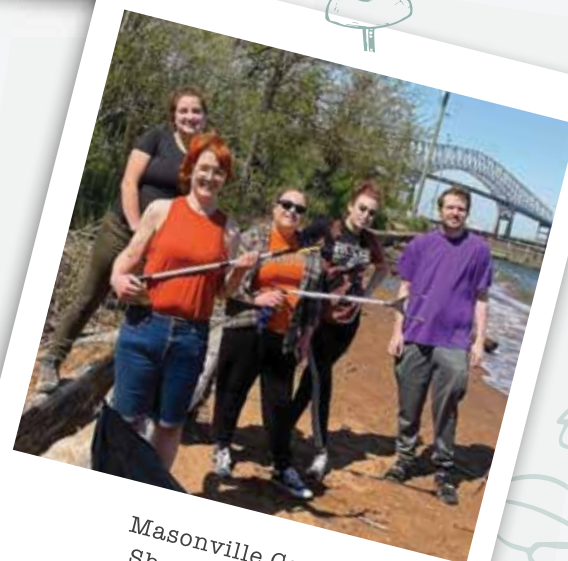
Field Trip with Alice Ferguson Foundation



Four Mile Run Conservatory Foundation Kayak Clean-up



Philly Orchard Project Work Day at Penn Park



Masonville Cove Shore Clean-up

MARYLAND COUNTY SHARE OF MARKET: 2023

Continued from page 56



QUEEN ANNE'S COUNTY (\$163.9 million) (Includes Centreville, Chester, Stevensville)

• Population	51,711	• Female	50.1%
• # of Households	18,914	• White	85.8%
• Median Income	\$99,597	• Black	6.3%
• Under age 18	21.2%	• Hispanic	4.6%
• Over age 65	19.8%	• Asian	1.3%

1	Albertsons (Safeway)	2	\$65.10	39.72%
2	Food Lion	2	\$24.90	15.19%
3	Target	1	\$20.40	12.45%
4	Walgreens	2	\$12.90	7.87%
5	Royal Farm Stores	3	\$9.10	5.55%
6	7-Eleven	3	\$7.90	4.82%
7	Wawa	1	\$7.51	4.58%
8	CVS	1	\$6.00	3.66%
9	Rite Aid	1	\$3.90	2.38%
10	Fas-Marts	2	\$2.60	1.59%
11	Dash-In	1	\$2.50	1.53%
		19	\$162.81	99.33%



SOMERSET COUNTY (\$46.2 million) (Includes Crisfield)

• Population	24,546	• Female	45.7%
• # of Households	8,113	• White	51.6%
• Median Income	\$48,661	• Black	40.9%
• Under age 18	17.1%	• Hispanic	4.1%
• Over age 65	17.4%	• Asian	1.0%

1	Food Lion	2	\$28.10	60.82%
2	Royal Farm Stores	2	\$8.10	17.53%
3	Rite Aid	1	\$3.50	7.58%
4	Dash-In	1	\$2.50	5.41%
5	Fas-Marts	1	\$2.30	4.98%
		7	\$44.50	96.32%

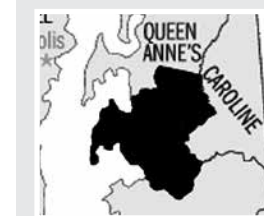


ST. MARY'S COUNTY (\$375.2 million) (Includes Charlotte Hall, Leonardtown, Lexington Park)

• Population	114,877	• Female	49.8%
• # of Households	40,236	• White	73.0%
• Median Income	\$102,859	• Black	15.2%
• Under age 18	23.9%	• Hispanic	5.7%
• Over age 65	13.7%	• Asian	3.0%

1	Walmart (SuperCenter)	1	\$60.20	16.04%
2	BJ's Wholesale Club	1	\$40.70	10.85%

3	Weis Markets	2	\$39.03	10.40%
4	Giant Food	1	\$38.90	10.37%
5	Wawa	4	\$34.50	9.20%
6	Food Lion	2	\$31.80	8.48%
7	Harris Teeter	1	\$31.10	8.29%
8	CVS	6	\$27.20	7.25%
9	Target	1	\$16.90	4.50%
10	Military Commissaries	1	\$16.65	4.44%
11	Walgreens	3	\$12.30	3.28%
12	Aldi	1	\$8.50	2.27%
13	Sheetz	2	\$7.10	1.89%
14	Dash-In	2	\$4.30	1.15%
15	7-Eleven	1	\$2.50	0.67%
		29	\$371.68	99.06%



TALBOT COUNTY (\$243.8 million) (Includes Easton, St. Michael's)

• Population	37,932	• Female	52.2%
• # of Households	16,251	• White	77.2%
• Median Income	\$79,349	• Black	12.6%
• Under age 18	18.1%	• Hispanic	7.4%
• Over age 65	29.9%	• Asian	1.5%

1	Giant Food	1	\$38.50	15.79%
2	BJ's Wholesale Club	1	\$38.10	15.63%
3	Harris Teeter	1	\$28.20	11.57%
4	Walmart	1	\$24.10	9.89%
5	Albertsons (Acme)	1	\$20.90	8.57%
6	Target	1	\$18.80	7.71%
7	Weis Markets	1	\$11.49	4.71%
8	Graul's	1	\$10.80	4.43%
9	Aldi	1	\$8.90	3.65%
10	CVS	2	\$8.10	3.32%
11	Royal Farm Stores	2	\$7.50	3.08%
12	Wawa	1	\$7.37	3.02%
13	Walgreens	1	\$5.30	2.17%
14	7-Eleven	2	\$4.90	2.01%
15	High's/Baltimore	2	\$3.70	1.52%
16	Rite Aid	1	\$3.20	1.31%
17	Fas-Marts	1	\$2.10	0.86%
		21	\$241.96	99.25%

See MARYLAND COUNTY SHARE on page 60



IRi



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MARYLAND COUNTY SHARE OF MARKET: 2023

Continued from page 58

13	7-Eleven	2	\$6.10	1.91%
14	Save A Lot	1	\$4.60	1.44%
15	Fas-Marts	4	\$4.40	1.38%
16	Dash-In	1	\$2.50	0.78%
		37	\$319.22	100.19%*




WORCESTER COUNTY (\$241.6 million)
(Includes Ocean City, Pocomoke City, Snow Hill)

- Population 53,866
- # of Households 22,573
- Median Income \$71,262
- Under age 18 17.1%
- Over age 65 28.2%
- Female 51.0%
- White 80.2%
- Black 12.5%
- Hispanic 3.9%
- Asian 1.6%

1	Walmart (SuperCenter)	2	\$81.10	33.57%
2	Food Lion	4	\$63.10	26.12%
3	CVS	3	\$19.40	8.03%
4	Albertsons (Acme)	1	\$18.90	7.82%
5	7-Eleven	8	\$18.60	7.70%
6	Rite Aid	4	\$13.60	5.63%
7	Wawa	2	\$12.40	5.13%
8	Royal Farm Stores	3	\$8.50	3.52%
9	Walgreens	1	\$7.00	2.90%
10	Fas-Marts	1	\$2.40	0.99%
11	C&S Independents	3	\$0.84	0.35%
		32	\$245.84	101.75%*

() Name in parentheses indicates another banner used by the company.
 *Combined retailer sales exceed 100% due to spill-in from other areas. Because of consumers purchasing items in one county, but residing in an adjacent one, or due to summer tourist traffic, leakage can occur. County food sales are formulated from population and annual expenditures of county residents.


Source: Food World, June 2023



WASHINGTON COUNTY (\$575.1 million)
(Includes Fountainhead, Hagerstown, Hancock)

- Population 155,590
- # of Households 58,630
- Median Income \$67,349
- Under age 18 21.7%
- Over age 65 17.6%
- Female 48.8%
- White 75.8%
- Black 13.2%
- Hispanic 6.5%
- Asian 2.0%

1	The Giant Co. (Martin's)	4	\$180.30	31.35%
2	Walmart (SuperCenter)	2	\$119.50	20.78%
3	Weis Markets	3	\$70.42	12.24%
4	Sam's Club	1	\$41.70	7.25%
5	Sheetz	9	\$34.60	6.02%
6	Walgreens	4	\$22.00	3.83%
7	CVS	6	\$20.30	3.53%
8	Target	1	\$15.40	2.68%
9	Aldi	2	\$14.80	2.57%
10	Save A Lot	2	\$13.60	2.36%
11	Food Lion	1	\$11.50	2.00%
12	Lidl	1	\$8.20	1.43%
13	Grocery Outlet	1	\$6.90	1.20%
14	High's/Baltimore	2	\$4.30	0.75%
15	Royal Farm Stores	1	\$4.00	0.70%
16	C&S Independents	3	\$2.93	0.51%
17	7-Eleven	1	\$2.90	0.50%
		44	\$573.35	99.70%



WICOMICO COUNTY (\$318.6million)
(Includes Fruitland, Salisbury)

- Population 104,664
- # of Households 39,452
- Median Income \$63,610
- Under age 18 22.1%
- Over age 65 16.5%
- Female 52.5%
- White 61.2%
- Black 27.6%
- Hispanic 5.8%
- Asian 3.2%

1	Walmart (SuperCenter)	2	\$79.20	24.86%
2	Food Lion	4	\$40.30	12.65%
3	Albertsons (Acme)	1	\$40.20	12.62%
4	Sam's Club	1	\$38.20	11.99%
5	Royal Farm Stores	8	\$22.10	6.94%
6	Rite Aid	4	\$16.10	5.05%
7	Target	1	\$15.90	4.99%
8	Wawa	2	\$12.32	3.87%
9	Aldi	1	\$11.70	3.67%
10	Walgreens	2	\$11.00	3.45%
11	CVS	2	\$8.10	2.54%
12	Grocery Outlet	1	\$6.50	2.04%

THANK YOU!

from

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Pharmacy: (410) 272-3101

Bel Air North Main St.

223 N. Main Street
(410) 838-4130
Pharmacy: (410) 638-0600

Cardiff

1606 Dooley Road
(410) 452-5980
Pharmacy: (410) 452-9799

Festival at Bel Air

5 Bel Air South Parkway
(410) 569-0939
Pharmacy: (410) 512-8373

Forest Hill

2101 Rock Spring Road
(410) 420-8220
Pharmacy: (410) 838-8880

Riverside

1321 Riverside Parkway
(410) 272-3900
Pharmacy: (410) 272-1810

Jacksonville

14330 Jarrettsville Pike
(410) 666-3500
Pharmacy: (410) 666-1700

Parkville

Parkway Crossing Shop. Ctr.
(410) 668-1170
Pharmacy: (410) 668-0980

Howard Park

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IN REVIEW: ALBERTSONS MID-ATLANTIC

State	County	2023 Stores	2023 Sales (in millions)	2023 County Food Sales	% of 2023 County Market	2022 Stores	2022 Sales (in millions)	% of 2022 County Market
DC	Washington (Safeway)	12	\$389.60	\$2,617.30	14.89%	12	\$372.50	15.03%

DC Recap: 12 stores with sales of \$389.6 million. Total retail food sales for DC in the study: \$2.62 billion. Albertsons Mid-Atlantic share of DC is 14.89%.

DE	Kent (Acme/Safeway)	2	\$57.10	\$560.60	10.19%	2	\$56.50	10.75%
DE	Sussex (Acme/Safeway)	2	\$68.80	\$1,078.40	6.38%	2	\$65.70	6.56%

DE Recap: 4 stores with sales of \$125.9 million. Total retail food sales for DE in the study: \$1.64 billion. Albertsons Mid-Atlantic share of DE is 7.68%.

MD	Anne Arundel (Safeway)	8	\$240.40	\$2,491.60	9.65%	8	\$231.50	9.95%
MD	Baltimore City (Safeway)	3	\$92.70	\$1,581.30	5.86%	3	\$89.10	5.83%
MD	Baltimore County (Safeway)	7	\$175.10	\$3,629.50	4.82%	7	\$167.20	4.85%
MD	Calvert (Safeway)	2	\$70.60	\$423.20	16.68%	2	\$63.90	16.04%
MD	Carroll (Safeway)	3	\$101.60	\$720.30	14.11%	3	\$98.20	14.25%
MD	Cecil (Acme)	1	\$23.40	\$317.20	7.38%	1	\$23.00	7.94%
MD	Charles (Safeway)	3	\$101.00	\$564.80	17.88%	3	\$98.10	18.68%
MD	Frederick (Safeway)	2	\$36.80	\$1,015.20	3.62%	2	\$35.40	3.66%
MD	Harford (Safeway)	1	\$32.10	\$1,113.40	2.88%	1	\$31.40	3.03%
MD	Howard (Safeway)	3	\$77.20	\$1,270.20	6.08%	3	\$75.30	6.26%
MD	Kent (Acme)	1	\$20.40	\$103.50	19.71%	1	\$20.10	19.69%
MD	Montgomery (Balducci/Safeway)	19	\$529.70	\$3,963.80	13.36%	19	\$508.30	13.50%
MD	Prince George's (Safeway)	9	\$280.30	\$3,422.70	8.19%	9	\$268.80	8.34%
MD	Queen Anne's (Acme/Safeway)	2	\$65.10	\$163.90	39.72%	2	\$63.90	40.21%
MD	Talbot (Acme)	1	\$20.90	\$243.80	8.57%	1	\$20.30	8.91%
MD	Wicomico (Acme)	1	\$40.20	\$318.60	12.62%	1	\$38.80	12.95%
MD	Worcester (Acme)	1	\$18.90	\$241.60	7.82%	1	\$18.30	7.36%

MD Recap: 67 stores with sales of \$1.93 billion. Total retail food sales for MD in the study: \$22.75 billion. Albertsons Mid-Atlantic share of MD is 8.47%.

VA	Arlington (Balducci/Safeway)	4	\$77.60	\$1,054.20	7.36%	4	\$74.10	7.69%
VA	Culpeper (Safeway)	1	\$16.10	\$183.60	8.77%	1	\$14.90	8.59%
VA	Fairfax (Balducci/Safeway)	27	\$663.90	\$6,001.60	11.06%	27	\$615.70	11.24%
VA	Fauquier (Safeway)	1	\$21.50	\$190.00	11.32%	1	\$19.90	10.56%
VA	Loudoun (Safeway)	4	\$57.70	\$1,629.40	3.54%	4	\$53.90	3.51%
VA	Prince William (Safeway)	4	\$86.20	\$2,149.40	4.01%	4	\$80.60	4.16%

VA Recap: 41 stores with sales of \$923.0 million. Total retail food sales for VA in the study: \$26.27 billion. Albertsons Mid-Atlantic share of VA is 3.51%.

Mid-Atlantic Recap: 124 stores with sales of \$3.36 billion annually. Mid-Atlantic retail food sales total: \$60.6 billion.

Albertsons Mid-Atlantic Per Store Average: \$27.14 million () Indicates another banner used by the company.

Source: *Food World*, June 2023

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Legislative Line

Standardizing Food Date Labels

A new bipartisan, bicameral bill has been introduced in the House and Senate that aims to standardize and clarify food date labels to reduce food waste. You will recall that food labeling information has for some time often confused consumers and there has been a major push by consumers, manufacturers, retailers, and legislative bodies alike to reduce food waste and channel more unsalable but safe food to the needy. This new bill aims to tackle these two problems.

The Food Date Labeling Act, according to *Food Safety News*, is being brought forth by the Bipartisan Food Recovery Caucus co-chair Representatives Chellie Pingree (D-ME) and Dan Newhouse (R-WA), and Senator Richard Blumenthal (D-CT). Through new legislation, they seek to limit the number of different phrases on product labels and provide consumers with information that differentiates safety versus quality issues.

The objectives of the legislation would standardize the language used on food date labels, reducing confusion and improving understanding among consumers, said *Food Safety News*. Apart from baby formula, date labels on food are not federally regulated or standardized. The proposed Food Date Labeling Act would change this and save consumers money while preventing over half a million tons of food waste from entering landfills each year, according to the bill's legislative sponsors.

In response to the reintroduction of the bill, Danielle Melgar, an advocate for the United States Public Interest Research Group emphasized the importance of accurate and useful information and explained, "Consumers want and deserve accurate and useful information about the food that they purchase" and further highlighted the absurdity of throwing away perfectly good food because of an arbitrary, hard-to-understand label and praised the Food Date Labeling Act as a solution to this problem.

USDA Funds Projects For WIC

The U.S. Department of Agriculture has awarded \$16 million in subgrant funding from the American Rescue Plan Act of 2021 to

over 35 projects aimed at testing outreach strategies to increase participation and equity in the Special Supplemental Nutrition Program (SNAP) for Women, Infants, and Children, commonly known as WIC. The new funds are made possible through a cooperative agreement with USDA's Food and Nutrition Service, and the Food Research & Action Center (FRAC), a nonprofit whose mission is to improve the well-being of people struggling with poverty-related hunger.

Did you know that only 50 percent of eligible individuals participate in WIC? FRAC said, "WIC has played an essential role in helping children grow up healthy and ensuring mothers get the support they need before, during and after pregnancy. But for the program to truly maximize its potential we need to get 100 percent of eligible individuals enrolled and actively participating." These new USDA grants are aimed to do just that – get more needy folks enrolled in the WIC program. Hopefully food retailers will notice an uptick in WIC voucher redemptions.

Farm Bill Update

When drafting the new farm bill, many pieces of a huge legislative puzzle must fall into place to appease both Democrats and Republicans as well as the "farm-to-fork" food industry participants and players. However, above all, figuring out exactly what the new farm bill will cost is high on legislators' minds as they currently contemplate the all-important farm bill. Well, last month the Congressional Budget Office (CBO) updated its cost estimates for crafting the upcoming farm bill that is scheduled for a final vote in the fall.

CBO's input is crucial to the farm bill process as it basically informs and educates House and Senate members as to how much money they must allocate within programs and if federal funds must be moved from one pot to another. According to *Politico News*, CBO has just adjusted its projected SNAP funding allocation for fiscal 2024 to 2033 upward by about \$17.7 billion from its February estimate of \$1.205 trillion, bringing total outlays over the



Barry F. Scher
Policy Solutions LLC

next decade to \$1.223 trillion. In 2023 alone, CBO has just adjusted SNAP costs for fiscal 2023 upward significantly and predicts the program will cost about \$145 billion, up from its previous estimate of about \$127 billion. What all this means in our opinion at Policy Solutions is that the next farm bill is expected to be the most expensive farm bill ever with a potential price tag of around \$1.5 trillion! If you thought correctly that funding social welfare programs like SNAP and WIC were major points of contention with the recent debt ceiling issue, it will be even more so within the upcoming farm bill discussions.

A Warning

The U.S. Equal Employment Opportunity Commission (EEOC) has intensified its efforts to investigate harassment cases against young employees specifically in the food industry. If you want to stay out of the way of the EEOC enforcement arm, it is advisable to have within your operating procedures solid anti-harassment policies. This includes regular workplace training policies and having a formal process in place to address reported incidents. This is what you pay your HR and legal counsel folks to do so dust off your rules, regulations, and policies to make sure they are up to date and in compliance.

Enhancing Organic Markets

Agriculture Secretary Tom Vilsack has announced that the USDA is taking additional steps, as part of

its commitment to strengthen the market for domestically grown organic goods, to support producers seeking organic certification. These new organic opportunities are part of the USDA's "Organic Transition Initiative," launched in 2022, which is a suite of offerings to help existing organic farmers and those transitioning to organic production and processing.

Through the new Organic Market Development Grant Program, USDA's Agricultural Marketing Service (AMS) will issue up to \$75 million in new competitive grants. The goal is to increase the consumption of domestic agricultural commodities by aiding in the expansion of markets or development of new markets, marketing facilities, and uses for such commodities. More information can be found at: farmers.gov/organic-transition-initiative.

Food Traceability Rule

Last month I highlighted a new video that is available for compliance with the new Food Traceability Rule. Now we have a printed document that can help guide food retailers. The Food and Drug Administration (FDA) has published a new "Small Entity Compliance Guide" for the Food Safety Modernization Act (FSMA) Food Traceability Rule. The compliance guide describes the requirements of the Food Traceability regulation to assist small businesses in complying with the applicable record-keeping requirements. The FSMA Food Traceability Rule was issued in November 2022 and the compliance date for recordkeeping requirements is January 20, 2026. For more information, go to usfda@public.govdelivery.com.

Debt Ceiling Deal With SNAP

The debt limit deal that made it over the finish line with only a few days to spare last month offers a win for both sides of the aisle, SNAP. House Republicans who have struggled unsuccessfully for many years to tighten work rules for SNAP beneficiaries walked away from the new debt ceiling discussions with a win that will expand the work requirements to

people in their early 50s. However, on the president's side coupled with House Democrats, they also won key new exemptions for SNAP beneficiaries for veterans and the homeless. The final deal sunsets the SNAP work requirements in 2030 and also includes new policies dealing with emergency cash assistance known as Temporary Assistance for Needy Families. Of course, not everyone is pleased. As one House Democrat said, "It isn't good. But it's better than defaulting."

As I previously mentioned, all the discussions dealing with the debt ceiling will have a major impact on the upcoming farm bill discussions. As the adage goes: "it ain't over till the fat lady sings," as some legislators from both sides of the aisle are saying. A hard-core group of legislators are still not pleased with the outcome on SNAP and other food insecurity measures in the recent debt ceiling discussions. I will report more on this matter next month.

Active Shooters

What is our world coming to? Training programs for safe food handling techniques, how to rotate stock for freshness, how to run an efficient store and a slew of other training programs are taking a backseat to a new training program that is now available for food retailers entitled "Training Grocery Store Employees on How to Respond to Active Shooters." The Retail Learning Institute in collaboration with the Coca-Cola Institute and Rouses Markets and others, have launched an essential online course aimed at equipping grocery store employees with the necessary knowledge to respond effectively to active shooter incidents. Who ever thought? Available in both English and Spanish, this concise five minute course provides a comprehensive how-to video that emphasizes the "run, hide, defend" approach. Go to www.retaillearning.net for more information. Sad that we must resort to this, isn't it?

Barry Scher is associated with the public policy firm of Policy Solutions LLC and can be reached at Bscher@policy-solutions.net.

TAKING STOCK

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Natick Mall. At 134,000 square feet, the former JC Penney location was one of the high-volume merchant's largest stores. The announcement shouldn't be that surprising since the success rate of supermarkets succeeding in traditional shopping malls has typically been so low that very few food retailers even attempt such an effort. But this is Wegmans, with its ability to crank out sales of \$1.5+ million a week in a large footprint almost a given. The demographics in the Natick-Framingham area are great and Wegmans' five other stores in Massachusetts are all performing at high levels. But some age-old truths do not evolve with the times...a tip of the hat to arguably the most unsung and successful leader in the grocery business. That would be Dan Bane, who will retire July 2 as chief executive of Trader Joe's after 22 years at the helm. Current COO Bryan Palbaum will become chairman and CEO upon Bane's retirement. Additionally, current president of stores John Basalone will be promoted to vice chief executive officer and company president. "I take great pride that together we have made Trader Joe's the best grocery store in America. Thanks to all," said Bane in typical low-key fashion...BJ's, which has been on a great run over the past three years, has added the chairman duties to current president and chief executive Bob Eddy's list of responsibilities. The very capable and well-respected Chris Baldwin, who served as the Marlborough, MA-based club operator's CEO from 2016 to 2021 and chairman since 2021, will remain on BJ's board. Eddy first joined the discounter in 2007...almost under the radar was the announcement that Latriece Watkins has been named chief merchandising officer for Walmart's U.S. stores, one of the most powerful jobs in the full spectrum of retail. Most recently, Watkins served as executive VP-consumables for the "Behemoth's" 4,600 U.S. stores. She has been with the Bentonville, AR-based merchant since 1999. "We have a rich history of strong leaders who embrace change, set bold visions for our teams and best represent the humanity that is Walmart," said John Furner, CEO of Walmart's U.S. stores in an internal email. "For two decades I've admired those qualities in Latriece Watkins, who I'm pleased to announce as our new chief merchandising officer-Walmart U.S. Anyone who has worked with Latriece knows she's a merchant at heart and has a passion for developing future leaders. Her enthusiasm, talent and deep experience helped establish the omni-merchandising strategy we have today, and her focus on customers and members will only strengthen our position. I'm excited to see our merchandising team excel in its mission to be the customer's first choice under her leadership." Watkins succeeds Charles Redfield, who stepped down as chief merchant last month after more than 30 years with Walmart... remember Ron Bonacci and Brian Bosworth from their days at Weis Markets not so long ago (as well as other industry stops)? Well, both industry veteran executives have emerged at Rouse's Markets as VP-advertising and marketing and VP-center store respectively. They will report directly to Donny Rouse, fourth-generation CEO of the family-held firm based in beautiful Thibodaux, LA, the heart of Cajun country, about 15 miles from Bayou Blue (not be confused with the great Roy Orbison song "Blue Bayou")...former Ahold Delhaize USA CEO Kevin Holt has been named a director of Canada's largest retailer, Loblaw. Also joining the Toronto-based chain's board is Shelley Broader whose career also has a Delhaize America connection - she was CEO of Sweetbay Supermarkets (later sold to Bi-Lo whose Carolina stores are now owned by ADUSA) and began her career at Hannaford (now also part of ADUSA). One more Ahold Delhaize-related note - according to CEO Frans Mueller in an interview with *Reuters*, the large Dutch merchant is about 50 percent of the way to meeting its target to grow sales from outside its grocery stores to 1 billion euros (\$1.08 billion) by 2025. Muller said the new revenue stream to keep food prices lower as inflation continues to impact consumers in the U.S. and Europe. "What we generate on retail media revenue, we will reinvest in our business to make sure that consumers can afford themselves healthy and sustainable products," Muller noted. "We have to work very hard together, with retail and manufacturing, to keep costs down." Ahold Delhaize entered the retail media game a bit late, giving already dominant revenue leaders Amazon and Walmart a big head start, Ahold Delhaize's target of reaching 1 billion euros in the next 18 months is a modest one when you consider Amazon garnered a whopping \$11.6 billion from its retail ad busi-

TAKING STOCK continues on page 69



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DIRECTORY OF RETAILERS

From page 16

Chief of Staff/Dir. of Merch. Acceleration: Jennifer Scott
Primary Distributor: Direct/C&S Wholesale Grocers
Area Stores: 63 (Includes Martin's)
Area Vol.: \$3.01 billion

Giant Eagle

101 Kappa Dr
RIDC Park
Pittsburgh, PA 15238
Phone: (412) 963-6200
Web: giganteagle.com
Interim CEO: Bill Artman
Primary Supplier: Direct
Area Stores: 4 (includes Get Go)
Area Vol.: \$42.3 million

Giant Food LLC

Div. of Ahold Delhaize USA
8301 Professional Pl.
Landover, MD 20785
Phone: (301) 341-4100
Web: giantfood.com
Pres.: Ira Kress
SVP: Diane Hicks
VP-Mktg.: Dyani Hanrahan

VP-Finance: Tony Matala
VP-HR: Brian Wanner
VP-Dist.: Joe Urban
VP-Cat. Mgmt.-Fresh Foods: Richard Manzi
VP-Cat. Mgmt.-Non-Perishable: Diane Couchman
Dir.-E-Comm.: Gregg Dorazio
Dir.-Fresh Field Merch.: Dave Grove
Dir.-Pharmacy: Paul Zvaleny
Dir.-Deli-Bakery: Cindy Volk
Dir.-Produce/Floral: Rob Nickels
Dir.-Meat/Seafood: Bill Campbell
Dir.-Non-Perish. Field Merch.: Bobbi Majors
Dir.-Center Store Field Merch.: Daniel Wigginton
Dir.-Edible Groc./Dairy/Frozen: Monica Simmons-Dolce
Dir.-Nonfood: Ashley Gray
Dir.-Merch. Planning: Frank Gallagher
Dir.-Pricing/Promotion: Erik Weenink
Dir.-Brands & Media: Kate Kowalzik
Dir.-Ext. Comms. & Comm Rels.: Felis Andrade
Dir.-Mktg. Planning & Ops.: Kurt Guinther
Dir.-Digital Loyalty & CSM: Ryan Draude

Dir.-Healthy Living: Lisa Coleman
Sales Mgrs.: Paul Maskavich, Lisa Richardson, Patrick Starliper, Robert Withers, Joe Adams, Steve Grassi, Sonya Brown, Norman Dichard, Jamit Singh
Primary Supplier: Direct/C&S Wholesale Grocers
Area Stores: 161
Area Vol.: \$6.38 billion

Graul's

12200 Tullamore Rd.
Lutherville, MD 21093
Phone: (410) 308-2100
Web: graulsmarket.com
Officers/Buyers: Harold Graul Jr., Fred Graul, John Evans, Dennis Graul
Primary Supplier: UNFI
Area Stores: 6
Area Vol.: \$68.0 million

Great Valu Supermarkets

8258 Richfood Rd.
Mechanicsville, VA 23116
Phone: (804) 746-6000
Web: greatvalu.com
Primary Supplier: UNFI
Area Stores: 8

Area Vol.: \$79.6 million
*This is the advertising and marketing arm that serves a group of independents that operate in the marketing area.

Grocery Outlet

5650 Hollis St.
Emeryville, CA 94608
Phone: (510) 845-1999
Web: groceryoutlet.com
CEO: Eric Lundberg
Pres.: RJ Sheedy
Primary Supplier: Direct
Area Stores: 15
Area Vol.: \$100.3 million

Harris Teeter

Div. of Kroger
701 Crestdale Rd.
Matthews, NC 28105
Phone: (704) 845-3100
Web: harristeeter.com
Pres.: Tammy DeBoer
Primary Supplier: Direct
Area Stores: 78
Area Vol.: \$2.53 billion

See **DIRECTORY** on page 73

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TAKING STOCK

from page 67

ness (Amazon Advertising) in its recently completed fourth quarter alone... eye-opener of the month: New York City's app-based food delivery workers are slated to make a minimum of \$17.96 per hour plus tips effective July 12. That number will increase to \$19.96 an hour by 2025. So, if you want your groceries or restaurant food delivered by Instacart, DoorDash, Grubhub or Uber Eats, expect to pay more. Perhaps considerably more. Ah, the hidden costs of online marketing!...the "too politically correct" police might be visiting Kraft Heinz soon. One of the greatest names in the history of branding - the Wienermobile - has been replaced by a fleet of "Frankmobiles" after more than 80 years. Kraft Heinz said the name change was made to celebrate the company's new recipe for its 100% Beef Frank line.

Local Notes

The Virginia Supreme Court has rejected a request made by Wegmans to reconsider an earlier decision that found that local residents had the right to challenge local authorizations of the regional chain's plans to construct a 1 million square foot distribution center in Hanover County, VA which was approved by the county's board of supervisors in 2020. Last month's ruling offered no explanation of its decision, and what impact it will have on the new warehouse is unclear since the DC is almost finished and could begin operations later this summer. However, the Supreme Court's decision means the case will be sent back to a lower court for further review. So there could be further delays...Klein's ShopRite has added its Howard Park (Liberty Heights Avenue in Baltimore City) and Riverside, MD locations to its list of stores that will now utilize Wakefern's "Fresh to Table" offerings. The "store within a store" concept allows Klein's produce and fresh food departments to offer customers a one-stop-shop experience with chef-curated items including crab cakes, crab dip, Old Bay chicken salad and other Klein's signature items. The move follows recent "Fresh to Table" rollouts at other Klein's stores in Forest Hill, Aberdeen, Bel Air and Jacksonville... things keep getting worse for Chesapeake, VA-based Dollar General stores, which over the past six months has replaced most of its senior management team and overhauled its board of directors. In its recently completed Q1, the discounter's net earnings dropped to \$299 million compared to \$536 million in the corresponding period last year. That sent the company's stock spinning down to its current level of \$138 per share (it was \$172 per share 11 months ago). And while Dollar Tree's OSHA violations aren't as rampant as competitor Dollar General, OSHA continues to find stores that violate its health and safety codes (more than 300 violations in the past six years). It was recently fined \$98,219 for a repeat violation at its Pewaukee, WI store... Giant Food's Sean Conlon has been named a winner (one of four) in FMI's 2023 Store Manager Awards. Conlon was named by the trade association as the industry's best manager for retailers who operate between 500 and 199 stores. Each winner receives \$1,000 and a crystal award. Sean currently manages the Giant on Jeff Davis Highway in Fredericksburg, VA...I just learned that the Starbucks location closest to my home in Ellicott City, MD is possibly headed for unionization. Employees at the Route 40 store have filed a petition with the National Labor Relations Board to organize. One word of advice to Starbucks: I wouldn't bring former CEO "Humble Howie" Schultz in from the bullpen to put out this fire...now that the Ocado-driven Kroger fulfillment center in Frederick, MD is open, sister retailer Harris Teeter has expanded home delivery into the Baltimore metro area and plans to add other Maryland zip codes in the coming months. Currently, about 30,000 items from the 350,000 square foot Frederick facility are available through HT's website or app...from the obituary desk this month we have several deaths to report. Tom Smith, former Food Lion CEO, has passed away at the age of 81. Smith started working for the Salisbury, NC retailer as a bagger (when it was known as Food Town) in the early 1960s while attending Catawba College. After graduating, he joined Del Monte for six years as a sales rep before returning to the retailer in 1970 as a buyer. Smith worked closely with founder Ralph Ketner and when Ketner retired as CEO in 1981, Smith became president and COO. In 1986, he was promoted to CEO of the fast-growing retailer, which by that time had grown to nearly 500 stores with

TAKING STOCK continues on page 93

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- Ahold Delhaize, Amsterdam, The Netherlands
- Albertsons Companies, Boise, ID
- Aldi, Batavia, IL
- Amazon, Seattle, WA
- Costco, Issaquah, WA
- Grocery Outlet, Emeryville, CA
- Kroger, Cincinnati, OH
- Sam's Club, Bentonville, AR
- Save-A-Lot, St. Ann, MO
- Sprouts, Phoenix, AZ
- Target, Minneapolis, MN
- Trader Joe's, Monrovia, CA
- Wal-Mart, Bentonville, AR
- Walgreens, Deerfield, IL
- Whole Foods, Austin, TX
- 7-Eleven, Dallas, TX



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IN REVIEW: WEGMANS

State	County	2023 Stores	2023 Sales (in millions)	2023 County Food Sales	% of 2023 County Market	2022 Stores	2022 Sales (in millions)	% of 2022 County Market
DC	Washington	1	\$90.70	\$2,617.30	3.47%	0	\$0.00	0.00%
DC Recap: 1 store with sales of \$90.7 million. Total retail food sales for DC in the study: \$2.62 billion. Wegmans share of DC is 3.47%.								
MD	Anne Arundel	1	\$92.60	\$2,491.60	3.72%	1	\$88.80	3.81%
MD	Baltimore County	2	\$171.50	\$3,629.50	4.73%	2	\$163.20	4.73%
MD	Frederick	1	\$76.40	\$1,015.20	7.53%	1	\$72.30	7.48%
MD	Harford	1	\$97.60	\$1,113.40	8.77%	1	\$92.40	8.91%
MD	Howard	1	\$109.50	\$1,270.20	8.62%	1	\$102.70	8.54%
MD	Montgomery	1	\$99.40	\$3,963.80	2.51%	1	\$94.90	2.52%
MD	Prince George's	1	\$98.30	\$3,422.70	2.87%	1	\$95.60	2.97%
MD Recap: 8 stores with sales of \$745.3 million. Total retail food sales for MD in the study: \$22.75 billion. Wegmans share of MD is 3.28%.								
PA	Cumberland	1	\$61.40	\$1,252.70	4.90%	1	\$59.80	4.96%
PA	Lancaster	1	\$69.00	\$1,889.90	3.65%	1	\$65.90	3.56%
PA Recap: 2 stores with sales of \$130.4 million. Total retail food sales for PA in the study: \$7.31 billion. Wegmans share of PA is 1.78%.								
VA	Albemarle	1	\$75.40	\$699.10	10.79%	1	\$71.90	10.61%
VA	Chesterfield	1	\$66.80	\$1,688.50	3.96%	1	\$63.90	4.26%
VA	Fairfax	6	\$621.50	\$6,001.60	10.36%	4	\$417.20	7.62%
VA	Henrico	1	\$68.70	\$2,024.70	3.39%	1	\$66.10	3.35%
VA	Loudoun	2	\$195.70	\$1,629.40	12.01%	2	\$186.50	12.14%
VA	Prince William	2	\$226.30	\$2,149.40	10.53%	2	\$214.70	11.08%
VA	Spotsylvania	1	\$76.50	\$856.60	8.93%	1	\$72.90	8.86%
VA	Virginia Beach	1	\$72.70	\$1,801.80	4.03%	1	\$69.10	4.08%
VA Recap: 15 stores with sales of \$1.4 billion. Total retail food sales for VA in the study: \$26.27 billion. Wegmans share of VA is 5.34%.								

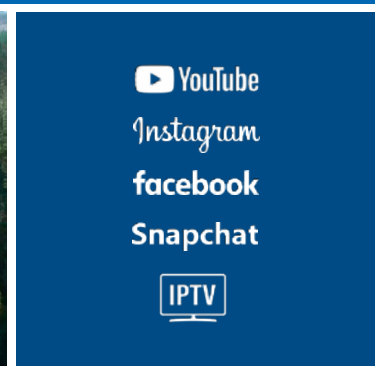
Mid-Atlantic Recap: 26 stores with sales of \$2.37 billion annually. Mid-Atlantic retail food sales total: \$60.6 billion.

Wegmans Per Store Average: \$91.15 million

Source: Food World, June 2023

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*Data is from IRI Total U.S. Period ending April 23, 2023

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Sprouts Farmers Market Opens Second Virginia Location, A 25,720 SF Unit In Manassas



Sprouts Farmers Market opened its second Virginia location May 12 in Manassas, VA. Welcoming shoppers to the 25,720 square foot location are Sprouts' (l-r) Gomer Antiquiera, Russell Ferrebee, April Young, Ryan Kelly, Jesse Bates and Ben Funk.



Making sure the new store is ready for customers are Sprouts' Mito Moron (l) and Moira Brooks.



Andrew Cortes (l) of Perfectemp takes a look around the new store with Paul Freehart of Sprouts.



This Sprouts trio includes Parker Young (l), Ravi Gandhi (c) and Lindsay Wood.



In the produce department, our camera spotted Dale Roberts (l) of Melissa's and Alex Blanco of Sprouts.



Smiling for our photographer are Reggie Bordon (l) and Gomer Antiquiera, both with Sprouts.

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IN REVIEW: TARGET

State	County	2023 Stores	2023 Sales (in millions)	2023 County Food Sales	% of 2023 County Market	2022 Stores	2022 Sales (in millions)	% of 2022 County Market
DC	Washington	5	\$105.60	\$2,617.30	4.03%	5	\$96.50	3.89%
DC Recap: 5 stores with sales of \$105.6 million. Total retail food sales for DC in the study: \$2.62 billion. Target share of DC is 4.03%.								
DE	Kent	1	\$19.20	\$560.60	3.42%	1	\$18.10	3.44%
DE Recap: 1 store with sales of \$19.2 million. Total retail food sales for DE in the study: \$1.64 billion. Target share of DE is 1.17%.								
MD	Anne Arundel	5	\$111.60	\$2,491.60	4.48%	5	\$105.60	4.54%
MD	Baltimore City	1	\$23.20	\$1,581.30	1.47%	1	\$22.30	1.46%
MD	Baltimore County	6	\$112.30	\$3,629.50	3.09%	6	\$106.80	3.10%
MD	Carroll	1	\$15.80	\$720.30	2.19%	1	\$14.70	2.13%
MD	Charles	2	\$30.20	\$564.80	5.35%	2	\$28.90	5.50%
MD	Frederick	1	\$17.10	\$1,015.20	1.68%	1	\$16.10	1.66%
MD	Harford	3	\$54.90	\$1,113.40	4.93%	3	\$53.80	5.19%
MD	Howard	2	\$45.50	\$1,270.20	3.58%	2	\$44.30	3.68%
MD	Montgomery	6	\$134.20	\$3,963.80	3.39%	6	\$127.60	3.39%
MD	Prince George's	9	\$236.50	\$3,422.70	6.91%	9	\$222.00	6.89%
MD	Queen Anne's	1	\$20.40	\$163.90	12.45%	1	\$19.60	12.33%
MD	St. Mary's	1	\$16.90	\$375.20	4.50%	1	\$15.80	4.04%
MD	Talbot	1	\$18.80	\$243.80	7.71%	1	\$17.70	7.77%
MD	Washington	1	\$15.40	\$575.10	2.68%	1	\$14.80	2.67%
MD	Wicomico	1	\$15.90	\$318.60	4.99%	1	\$15.20	5.07%
MD Recap: 41 stores with sales of \$868.7 million. Total retail food sales for MD in the study: \$22.75 billion. Target share of MD is 3.82%.								
PA	Cumberland	2	\$37.20	\$1,252.70	2.97%	2	\$35.80	2.97%
PA	Dauphin	2	\$31.30	\$1,104.00	2.84%	2	\$29.40	2.76%
PA	Franklin	1	\$18.60	\$480.20	3.87%	1	\$17.80	3.91%
PA	Lancaster	3	\$62.40	\$1,889.90	3.30%	3	\$59.20	3.19%
PA	Lebanon	1	\$18.90	\$487.60	3.88%	0	\$0.00	0.00%
PA	York	3	\$62.70	\$1,731.80	3.62%	3	\$59.80	3.64%
PA Recap: 12 stores with sales of \$231.1 million. Total retail food sales for PA in the study: \$7.31 billion. Target share of PA is 3.16%.								
VA	Albemarle	1	\$16.30	\$699.10	2.33%	1	\$15.60	2.30%
VA	Arlington	3	\$62.40	\$1,054.20	5.92%	2	\$46.00	4.78%
VA	Chesapeake City	3	\$32.90	\$947.50	3.47%	3	\$31.20	3.52%
VA	Chesterfield	5	\$70.70	\$1,688.50	4.19%	5	\$66.30	4.42%
VA	Culpeper	1	\$15.90	\$183.60	8.66%	1	\$15.30	8.82%
VA	Fairfax	11	\$264.80	\$6,001.60	4.41%	11	\$250.50	4.57%
VA	Frederick	2	\$29.10	\$544.60	5.34%	2	\$27.80	5.32%
VA	Hampton/Newport News	2	\$29.60	\$1,331.60	2.22%	2	\$28.00	2.10%
VA	Hanover	1	\$18.10	\$515.60	3.51%	1	\$17.20	3.55%
VA	Henrico	6	\$106.50	\$2,024.70	5.26%	6	\$99.70	5.06%
VA	James City	2	\$27.10	\$452.50	5.99%	2	\$25.80	6.05%
VA	Loudoun (Super Target)	3	\$65.20	\$1,629.40	4.00%	3	\$61.70	4.02%
VA	Norfolk City	1	\$15.10	\$841.80	1.79%	1	\$14.30	1.81%
VA	Orange	1	\$16.80	\$148.20	11.34%	0	\$0.00	0.00%
VA	Prince William (Super Target)	4	\$66.90	\$2,149.40	3.11%	4	\$62.80	3.24%
VA	Spotsylvania (Super Target)	2	\$35.80	\$856.60	4.18%	2	\$33.60	4.08%
VA	Stafford	2	\$38.10	\$441.60	8.63%	2	\$37.50	8.56%
VA	Virginia Beach	4	\$65.40	\$1,801.80	3.63%	4	\$61.20	3.61%
VA	Warren	1	\$18.20	\$170.40	10.68%	1	\$17.40	10.78%
VA Recap: 55 stores with sales of \$994.9 million. Total retail food sales for VA in the study: \$26.27 billion. Target share of VA is 3.79%.								

Mid-Atlantic Recap: 114 stores with sales of \$2.22 billion annually. Mid-Atlantic retail food sales total: \$60.6 billion.

Target Per Store Average: \$19.47 million

Source: *Food World*, June 2023

DIRECTORY OF RETAILERS

From page 68

Karns Quality Food Ltd.

675 Silver Spring Rd.
Mechanicsburg, PA 17050
Phone: (717) 766-6477
Web: karnsfoods.com
CEO/Pres.: D. Scott Karns
Primary Supplier: UNFI
Area Stores: 10
Area Vol.: \$188.0 million

Kroger

Mid-Atlantic Div.
140 Eastshore Dr., Ste. 300
Glen Allen, VA 23059
Phone: (513) 762-4000
Web: kroger.com
CEO: Rodney McMullen
Pres.-Mid-Atlantic Div.: Lori Raya
Primary Supplier: Direct
Area Stores: 37 (Includes Marketplace)
Area Vol.: \$1.37 billion

Lidl U.S.

3500 S. Clark St.
Arlington, VA 22202
Phone: (571) 398-5435

Web: lidl.com
Pres./CEO Lidl US: Michal Lagunionek
VP-U.S. Operations: Pavel Petkov
Primary Supplier: Direct
Area Stores: 60
Area Vol.: \$512.9 million

MOM's Organic Market

5566 Randolph Rd
Rockville, MD 20852
Phone: (301) 816-4944
Web: momsorganicmarket.com
CEO: Scott Nash
Primary Supplier: UNFI
Area Stores: 16
Area Vol.: \$254.8 million

Publix

3300 Publix Corporate Pkwy.
Lakeland, FL 33811
Phone: (863) 688-7407
Pres./CEO: Todd Jones
Charlotte, NC Div.:
4135 S. Stream Blvd., Ste. 500
Charlotte, NC 28217
Phone: (704) 424-5017
Pres.: Joey Riddle
Web: publix.com

Primary Supplier: Direct
Area Stores: 19
Area Vol.: \$307.0 million

Redner's Markets Inc.

3 Quarry Rd.
Reading, PA 19605
Phone: (610) 926-3700
Web: rednersmarkets.com
Chairman: Richard Redner
Pres./CEO: Ryan Redner
COO: Gary M. Redner
VP-Procurement: Dan Eberhart
VP/General Counsel: Jason Hopp
VP-Finance: Richard Rabenold
VP-Groc. Ops.: William Wallace
VP-Perishables: Gary O'Brien
VP-HR: Robert McDonough
VP-IT: Nicholas Hidalgo
Primary Supplier: UNFI
Area Stores: 14
Area Vol.: \$318.5 million

Roots Market

5808 Clarksville Square Rd.
Clarksville, MD 21029
Phone: (443) 535-9321
Web: rootsmkt.com
Owner: Jeff Kaufman

Area Stores: 2
Area Vol.: \$24.0 million

Save A Lot

400 Northwest Plaza Dr.
St. Ann, MO 63074
Phone: (314) 592-9100
Web: save-a-lot.com
CEO: Leon Bergmann
Supplier: Direct
Area Stores: 33
Area Vol.: \$212.9 million

Sharp Shopper

1110 Sharp Ave.
Ephrata, PA 17522
Phone: (717) 733-9555
Web: sharpshopper.net
Owners: Dennis & Bonnie Sharp
Primary Supplier: Direct
Area Stores: 4
Area Vol.: \$53.7 million

Shoppers Food

Div. of UNFI
16901 Melford Blvd., Ste. 300
Bowie, MD 20715

See **DIRECTORY** on page 77



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FOR MORE INFO,
CONTACT:



BILL CARTER - VP, SALES & MARKETING - 215-536-4220 x 115, BCARTER@KNAUSSFOODS.COM



487 Devon Park Dr., Ste. 210 Wayne, PA 19087 - Phone: 610-964-9566

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Retailers, Suppliers Travel West To Anaheim Convention Center For IDDBA 2023, Held June 4-6



The International Dairy Deli Bakery's flagship show – IDDBA 2023 - was held earlier this month at the Anaheim Convention Center. Traveling west from the Baltimore market were B. Green's Jim Marciniak (l) and Joanne Fischer.



These fine folks are (l-r) Cynthia Volk and Erin Koller, Giant Food; Carrie Todd, Hormel; Lisa Podesta-Coombs, Allan Perkins, Scott Holbrook and Jeff Hodge, JOH.



This Grocery Outlet trio features Tonya Rice (l), Lori Kunkle (c) and Michele Rosenthal.



Handling business at the show for Wawa are Scott Drozdowski (l), Jerome Hunsinger (c) and Becky Pfister.



In the Martin's Famous Potato Rolls booth, our camera spotted Todd Bixby (l), Katie Henry (c) and Dennis Wenrick.



This Taylor Farms group shot includes (l-r) Jennifer Watts, Ryan Stearle, Ed St. Clair, Kent Ford, Dan Ferraiolo and Michelle Story.



Dan McShain (c) of Affinity Group is flanked in this photo by Chris Kirby (l) and Jason Smith of Ithaca Hummus.



Checking out IDDBA 2023 from JOH were Joe Navitsky (l), Kelly D'Amico (c) and Chris Darmody.



This Amoroso Baking foursome features (l-r) Colin Ringwalt, Dave Deola, Jesse Amoroso and Len Amoroso.



These gentlemen are Dietz & Watson's Michael Eni (l), Louis Eni (c) and CJ Eni.



Michael Romines (2nd from r) of Fratelli Beretta catches up with (l-r) Geoff Mason, Michael Hughes and Bill Sando of Hughes Sales.



Utz is well represented at the show by Callie Neiderer (l) and Gary Friedman.



This CA Team photo features (l-r) Steve Demirjian, Eric Jordan, Elizabeth Hinsien, John Lewis, Travis Hubbard, Charles Woods, Rusty McDaniel, Lauri McKenna, Ernie Vespolo and Janell Stone.



Lidl's Katie Rock (r) is joined here by Lane Gordon (l) and Adam Michael of Mama Mancini's.



Mike Eardley (l), retiring IDDBA president, says hello to Justine Giordano (c) and Gary Leesman of Vincent Giordano Corp.



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School cancellations.
Health risks.**

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DELAWARE COUNTY SHARE OF MARKET: 2023

Total sales for those Delaware counties included in the study are \$1.64 billion



KENT COUNTY (\$560.6 million) (Includes Dover, Harrington, Smyrna)

- Population 189,149
- # of Households 67,299
- Median Income \$63,715
- Under age 18 22.80%
- Over age 65 17.50%
- Female 51.7%
- White 58.8%
- Black 28.4%
- Hispanic 7.8%
- Asian 2.6%

Rank	Company	Stores	Sales (in millions)	% of Market
1	Redner's Markets	3	\$76.50	13.65%
2	Wawa	7	\$73.43	13.10%
3	Walmart (SuperCenter)	2	\$66.20	11.81%
4	Albertsons (Acme/Safeway)	2	\$57.10	10.19%
5	Sam's Club	1	\$49.60	8.85%
6	Walgreens	8	\$38.80	6.92%
7	Food Lion	4	\$32.30	5.76%
8	Rite Aid	6	\$25.30	4.51%
9	Aldi	3	\$25.10	4.48%
10	Fas-Marts	14	\$22.10	3.94%
11	Target	1	\$19.20	3.42%
12	CVS	3	\$17.60	3.14%
13	Royal Farm Stores	8	\$17.30	3.09%
14	Military Commissaries	1	\$15.24	2.72%
15	International Markets	1	\$10.90	1.94%
16	Lidl	1	\$7.70	1.37%
17	7-Eleven	1	\$2.90	0.52%
18	C&S Independents	2	\$1.21	0.22%
		68	\$558.48	99.62%



SUSSEX COUNTY (\$1.1 billion) (Includes Bethany Beach, Millville, Seaford)

- Population 255,956
- # of Households 94,223
- Median Income \$64,905
- Under age 18 18.30%
- Over age 65 28.70%
- Female 51.60%
- White 75.40%
- Black 12.20%
- Hispanic 9.30%
- Asian 1.40%

1	Giant Food	3	\$183.70	17.03%
2	Food Lion	9	\$146.80	13.61%
3	Walmart (SuperCenter)	4	\$143.40	13.30%
4	Wawa	9	\$79.67	7.39%
5	Walgreens	14	\$79.10	7.33%
6	Redner's Markets	3	\$75.10	6.96%
7	Albertsons (Acme/Safeway)	2	\$68.80	6.38%
8	Weis Markets	3	\$60.36	5.60%
9	Royal Farm Stores	20	\$48.40	4.49%
10	BJ's Wholesale Club	1	\$43.70	4.05%
11	Harris Teeter	2	\$42.80	3.97%
12	C&S Independents	5	\$42.59	3.95%
13	CVS	6	\$34.10	3.16%
14	Rite Aid	10	\$32.10	2.98%
15	The Fresh Market	1	\$13.70	1.27%
16	Fas-Marts	8	\$12.10	1.12%
17	Aldi	1	\$11.30	1.05%
18	International Markets	1	\$9.70	0.90%
19	Save-A-Lot	1	\$7.50	0.70%
20	7-Eleven	1	\$3.10	0.29%
		104	\$1,138.02	105.53%*

() Name in parentheses indicates another banner used by the company.

*Combined retailer sales exceed 100% due to spill-in from other areas. Because of consumers purchasing items in one county, but residing in an adjacent one, or due to summer tourist traffic, leakage can occur. County food sales are formulated from population and annual expenditures of county residents.

Source: Food World, June 2023



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DIRECTORY OF RETAILERS

From page 73

Phone: (301) 306-8600
 Web: shoppersfood.com
 CEO: Alexander "Sandy" Miller
 Douglas
 Div. VP/GM: Jeff Bleichner
 Primary Supplier: UNFI
 Area Stores: 22
 Area Vol.: \$620.3 million

ShopRite

5000 Riverside Dr.
 Keasby, NJ 08832
 Phone: (908) 527-3300
 Web: shoprite.com
 Chmn.: Joseph Colalillo
 Pres.: Mike Stigers
 Area Stores: 14 (Includes Price Rite)
 Area Vol.: \$422.92 million
 *This is the retail arm of wholesaler
 grocery co-op Wakefern Food Corp.
 All of the ShopRite stores are inde-
 pendently owned. Most of the Price
 Rite stores are corporately owned.

Sprouts

5455 E. High St., Ste. 111
 Phoenix, AZ 85054

Phone: (480) 814-8016
 Web: sprouts.com
 CEO: Jack Sinclair
 CFO: Lawrence "Chip" Malloy
 Pres./COO: Nick Konat
 Chief Store Operations Officer:
 Dan Sanders
 Chief Fresh Merch. Officer: Scott
 Neal
 SVP/CMO: Gil Phillips
 SVP-Chief Forager.: Kim Coffin
 SVP-Supply Chain: Joe Hurley
 SVP-East: Dan Croce
 Primary Supplier: Direct/Kehe
 Area Stores: 6
 Area Vol.: \$116.2 million

Streets Market & Café

2400 14th St. NW
 Washington, DC 20009
 Phone: (202) 265-3300
 Web: streetsmarket.com
 VP: Campbell Burns
 Primary Supplier: UNFI
 Area Stores: 11
 Area Vol.: \$96.7 million

Trader Joe's

East Coast Div.

160 Federal St., 12th Fl.
 Phone: (857) 400-3400
 Web: traderjoes.com
 Chmn./CEO: Bryan Palbaum
 Pres.: John Basalone
 Supplier: Direct
 Area Stores: 30
 Area Vol.: \$790.4 million

Wegmans Food Markets, Inc.

1500 Brooks Ave.
 P.O. Box 30844
 Rochester, NY 14603-0844
 Phone: (585) 328-2550
 Web: wegmans.com
 Chmn: Danny Wegman
 Pres./CEO.: Colleen Wegman
 Primary Supplier: Direct
 Area Stores: 26
 Area Vol.: \$2.37 billion

Weis Markets, Inc.

1000 S. 2nd St.
 Sunbury, PA 17801
 Phone: (570) 286-4571
 Web: weismarkets.com
 Chairman/Pres./CEO: Jonathan
 Weis
 COO: Kurt Schertle

SVP/CFO/Treasurer: Michael Lock-
 hard
 SVP-Real Estate/Store Dev.: Rusty
 Graber
 SVP-HR: Jim Marcil
 SVP-Operations: David Gose
 SVP-Merch./Marketing: Bob Gleeson
 SVP/CIO: Greg Zeh
 Primary Supplier: Direct
 Area Stores: 96
 Area Vol.: \$1.98 billion

Whole Foods Market

Div. of Amazon
 Northeast Div.
 Harborside 3
 210 Hudson St., Ste 700L
 Jersey City, NJ 07311
 Phone: (201) 567-2090
 Div. Pres.: Nicole Davia
 Area Stores: 43 (includes Amazon
 Fresh)
 Area Vol: \$1.47 billion

See **DIRECTORY** on page 80



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IN REVIEW: WALGREENS

State	County	2023 Stores	2023 Sales (in millions)	2023 County Food Sales	% of 2023 County Market	2022 Stores	2022 Sales (in millions)	% of 2022 County Market
DC	Washington	8	\$65.30	\$2,617.30	2.49%	8	\$61.30	2.47%
DC Recap: 8 stores with sales of \$65.3 million. Total retail food sales for DC in the study: \$2.62 billion. Walgreens share of DC is 2.49%.								
DE	Kent	8	\$38.80	\$560.60	6.92%	8	\$36.90	7.02%
DE	Sussex	14	\$79.10	\$1,078.40	7.33%	14	\$77.60	7.74%
DE Recap: 22 stores with sales of \$117.9 million. Total retail food sales for DE in the study: \$1.64 billion. Walgreens share of DE is 7.19%.								
MD	Anne Arundel	16	\$65.60	\$2,491.60	2.63%	16	\$63.10	2.71%
MD	Baltimore City	19	\$140.90	\$1,581.30	8.91%	19	\$134.80	8.81%
MD	Baltimore County	27	\$172.40	\$3,629.50	4.75%	27	\$164.20	4.76%
MD	Calvert	2	\$11.90	\$423.20	2.81%	2	\$11.40	2.86%
MD	Caroline	1	\$5.90	\$100.70	5.86%	1	\$5.70	6.64%
MD	Carroll	4	\$21.30	\$720.30	2.96%	4	\$20.40	2.96%
MD	Cecil	3	\$14.10	\$317.20	4.45%	3	\$13.50	4.66%
MD	Charles	3	\$16.20	\$564.80	2.87%	3	\$15.60	2.97%
MD	Dorchester	1	\$5.80	\$64.60	8.98%	1	\$5.50	9.24%
MD	Frederick	5	\$28.80	\$1,015.20	2.84%	5	\$27.20	2.81%
MD	Harford	11	\$59.70	\$1,113.40	5.36%	11	\$56.90	5.49%
MD	Howard	5	\$29.10	\$1,270.20	2.29%	5	\$28.20	2.34%
MD	Kent	2	\$22.40	\$103.50	21.64%	2	\$21.60	21.16%
MD	Montgomery	13	\$78.30	\$3,963.80	1.98%	13	\$74.80	1.99%
MD	Prince George's	12	\$72.80	\$3,422.70	2.13%	12	\$69.50	2.16%
MD	Queen Anne's	2	\$12.90	\$163.90	7.87%	2	\$12.60	7.93%
MD	St. Mary's	3	\$12.30	\$375.20	3.28%	3	\$11.90	3.04%
MD	Talbot	1	\$5.30	\$243.80	2.17%	1	\$5.10	2.24%
MD	Washington	4	\$22.00	\$575.10	3.83%	4	\$21.40	3.86%
MD	Wicomico	2	\$11.00	\$318.60	3.45%	2	\$11.50	3.84%
MD	Worcester	1	\$7.00	\$241.60	2.90%	1	\$6.60	2.65%
MD Recap: 137 stores with sales of \$815.7 million. Total retail food sales for MD in the study: \$22.75 billion. Walgreens share of MD is 3.59%.								
PA	Franklin	1	\$6.30	\$480.20	1.31%	1	\$5.80	1.27%
PA	Lancaster	1	\$5.80	\$1,889.90	0.31%	1	\$5.50	0.30%
PA	York	3	\$17.90	\$1,731.80	1.03%	3	\$17.10	1.04%
PA Recap: 5 stores with sales of \$30.3 million. Total retail food sales for PA in the study: \$7.31 billion. Walgreens share of PA is 0.41%.								
VA	Accomack	0	\$0.00	\$101.80	0.00%	1	\$5.50	5.46%
VA	Albemarle	2	\$10.70	\$699.10	1.53%	2	\$10.20	1.51%
VA	Arlington	5	\$35.40	\$1,054.20	3.36%	5	\$34.00	3.53%
VA	Caroline	1	\$5.20	\$43.80	11.87%	1	\$5.00	14.88%
VA	Chesapeake City	6	\$28.60	\$947.50	3.02%	6	\$27.10	3.06%
VA	Chesterfield	9	\$59.90	\$1,688.50	3.55%	9	\$56.90	3.79%
VA	Culpeper	2	\$13.20	\$183.60	7.19%	2	\$12.60	7.27%
VA	Dinwiddie	2	\$11.80	\$143.40	8.23%	2	\$10.90	8.08%
VA	Essex	1	\$5.60	\$70.40	7.95%	1	\$5.20	7.80%
VA	Fairfax	21	\$129.40	\$6,001.60	2.16%	22	\$129.50	2.36%
VA	Fauquier	2	\$11.40	\$190.00	6.00%	2	\$11.10	5.89%
VA	Frederick	3	\$17.40	\$544.60	3.20%	4	\$23.20	4.44%
VA	Gloucester	1	\$5.80	\$136.30	4.26%	1	\$5.40	4.19%
VA	Hampton/Newport News	8	\$50.20	\$1,331.60	3.77%	8	\$47.40	3.55%
VA	Hanover	3	\$16.80	\$515.60	3.26%	3	\$16.10	3.33%
VA	Henrico	17	\$108.70	\$2,024.70	5.37%	18	\$108.90	5.53%
VA	James City	1	\$7.20	\$452.50	1.59%	1	\$6.90	1.62%
VA	Lancaster	1	\$6.10	\$88.60	6.88%	1	\$5.80	6.88%

IN REVIEW: WALGREENS

State	County	2023 Stores	2023 Sales (in millions)	2023 County Food Sales	% of 2023 County Market	2022 Stores	2022 Sales (in millions)	% of 2022 County Market
VA	Loudoun	10	\$56.30	\$1,629.40	3.46%	10	\$53.20	3.46%
VA	Louisa	1	\$5.70	\$47.60	11.97%	1	\$5.30	10.66%
VA	New Kent	1	\$5.90	\$62.80	9.39%	2	\$10.60	20.42%
VA	Norfolk City	5	\$33.70	\$841.80	4.00%	5	\$31.60	4.00%
VA	Northampton	1	\$5.10	\$41.90	12.17%	1	\$4.70	11.58%
VA	Northumberland	1	\$5.20	\$22.40	23.21%	1	\$4.80	22.43%
VA	Portsmouth City	2	\$12.80	\$298.30	4.29%	2	\$12.20	4.41%
VA	Prince George	1	\$5.10	\$81.90	6.23%	1	\$4.80	5.99%
VA	Prince William	9	\$60.50	\$2,149.40	2.81%	9	\$57.90	2.99%
VA	Richmond	1	\$4.80	\$24.10	19.92%	1	\$4.50	20.18%
VA	Shenandoah	2	\$9.40	\$122.80	7.65%	2	\$9.00	7.35%
VA	Southampton	1	\$5.50	\$97.50	5.64%	1	\$5.20	5.58%
VA	Spotsylvania	4	\$26.80	\$856.60	3.13%	5	\$25.30	3.07%
VA	Suffolk City	3	\$15.10	\$332.20	4.55%	3	\$14.60	4.73%
VA	Virginia Beach	14	\$71.10	\$1,801.80	3.95%	14	\$67.40	3.98%
VA	Westmoreland	2	\$9.60	\$50.20	19.12%	2	\$9.10	17.60%
VA	York	2	\$12.10	\$202.80	5.97%	2	\$11.60	6.35%

VA Recap: 145 stores with sales of \$868.1 million. Total retail food sales for VA in the study: \$26.27 billion. Walgreens share of VA is 3.3%.

Mid-Atlantic Recap: 317 stores with sales of \$1.9 billion annually. Mid-Atlantic retail food sales total: \$60.6 billion.

Walgreens Per Store Average: \$5.98 million

Source: *Food World*, June 2023

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DIRECTORY OF RETAILERS

From page 77

DRUG STORES

CVS Caremark

One CVS Dr.
Woonsocket, RI 02895
Phone: (401) 765-1500
Web: cvs.com
CEO/Pres.: Karen Lynch
Co-Pres.-CVS Pharmacy: Michelle Peluso, Prem Shah
Area Stores: 631
Area Vol.: \$3.77 billion
*Includes both stand-alone stores and pharmacies within Target locations.

Rite Aid

30 Hunter Ln.
Camp Hill, PA 17011
P.O. Box 3165
Harrisburg, PA 17105
Phone: (717) 761-2633
Web: riteaid.com
Interim CEO: Elizabeth "Busy" Burr
Area Stores: 176
Area Vol.: \$653.2 million

Walgreens

200 Wilmot Rd.
Deerfield, IL 60015
Phone: (847) 940-2500
Web: walgreens.com
CEO: Rosalind Brewer
Area Stores: 317
Area Vol.: \$1.9 billion

CONVENIENCE STORES

7-Eleven

3200 Hackberry Rd.
Irving, TX 75063
Phone: (972) 828-7011
Web: 7-eleven.com
Pres./CEO: Joseph DePinto
Primary Supplier: McLane
Area Stores: 1,122
Area Vol.: \$2.62 billion

Circle K Convenience Stores, Inc.

Div. of Couche-Tard
935 E. Tallamadge Ave.
Akron, OH 44310
Phone: (330) 630-6300
1100 Situs Court, Ste 100
Raleigh, NC 27606

Phone: (919) 774-6700
Web: circlek.com
Pres./CEO Brian P. Hannasch
Area Stores: 26
Area Vol.: \$59.0 million

Dash In

Div. of The Wills Group
102 Centennial St.
La Plata, MD 20646
Phone: (301) 932-3600
Chmn/CEO: Julian B. Wills III
Web: dashin.com
Primary Supplier: McLane
Area Stores: 45
Area Vol.: \$94.9 million

Fas Mart/Shore Shop Stores

Div. of GPM Investments
8565 Magellan Pkwy., Ste. 400
Richmond, VA 23227
Phone: (804) 730-1568
Web: fasmart.com
CEO: Arie Kotler
Primary Supplier: McLane
Area Stores: 97
Area Vol.: \$181/1 million

High's of Baltimore, LLC

Div. of Carroll Independent Fuel Co.
2700 Loch Raven Rd.
Baltimore, MD 21218
Phone: (410) 859-3636
Web: highsstores.com
Pres.: John Phelps
Primary Supplier: Liberty
Area Stores: 57
Area Vol.: \$108.9 million

Miller Marts

Div. of Global Partners IIc
800 South St., Ste. 500
Waltham, MA 02453
Phone: (781) 894-8800
Web: gotomillers.com
Primary Supplier: Davenport
Area Stores: 34
Area Vol.: \$64.4 million

Royal Farms

3611 Roland Ave.
Baltimore, MD 21211
Phone: (410) 889-0200
Web: royalfarms.com
Pres.: John Kemp

See **DIRECTORY** on page 81



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DIRECTORY OF RETAILERS

From page 80

Primary Supplier: Cooper Booth
Area Stores: 238
Area Vol.: \$681.4 million

Rutter's

Div. of CHR Corp.
2295 Susquehanna Trail, Ste. C
York, PA 17404
Phone: (717) 848-9827
Web: rutters.com
Pres.: Scott Hartman
Primary Supplier: Core-Mark
Area Stores: 72
Area Vol.: \$156.2 million

Sheetz, Inc.

243 Sheetz Way
Claysburg, PA 16625
Phone: (800) 765-4686
Web: sheetz.com
Exec. Vice Chmn.: Joe Sheetz
CEO/Pres.: Travis Sheetz
Primary Supplier: Direct
Area Stores: 159
Area Vol.: \$659.0 million

Turkey Hill Minit Markets

Div. of EG Group
257 Centreville Rd.
Lancaster, PA 17603
Phone: (888) 200-6211
Web: turkeyhillcstores.com
Pres.: George Fournier
Primary Supplier: Core-Mark
Area Stores: 118
Area Vol.: \$187.5 million

Wawa, Inc.

Red Roof, 260 W. Baltimore Pike
Wawa, PA 19063
Phone: (610) 358-8000
Web: wawa.com
CEO: Chris Gheysens
Primary Supplier: McLane/Direct
Area Stores: 185
Area Vol.: \$1.39 billion

WHOLESALE CLUBS

BJ's Wholesale Club

25 Research Dr.
Westborough, MA 01581
Phone: (774) 512-7400
Web: bjs.com

CEO: Bob Eddy
Area Stores: 30
Area Vol.: \$1.18 billion (grocery/
HBC only)

Costco

Northeast Div.
45940 Horseshoe Dr., Ste. 150
Sterling, VA 20166
Phone: (703) 406-6800
Web: costco.com
CEO: Craig Jelinek
Pres./COO: Ron Vachris
Northeast Div. SVP/GM: Adam
Self
Area Stores: 30
Area Vol.: \$2.03 billion (grocery/
HBC only)

Sam's Club

2101 SE Simple Savings Dr.
Bentonville, AR 72716
Phone: (501) 273-4000
Web: samsclub.com
CEO/Pres.: Kathryn McLay
Area Stores: 26
Area Vol.: \$1.12 billion (grocery/
HBC only)

MASS MERCHANDISERS

Target

1000 Nicollet Mall
Minneapolis, MN 55402
Phone: (612) 304-6073
Web: target.com
CEO: Brian Cornell
Area Stores: 114 (Includes Super
Target)
Area Vol.: \$2.22 billion (grocery/
HBC only)

Walmart

702 Southwest 8th St.
Bentonville, AR 72716
Phone: (479) 273-4000
Web: walmart.com
CEO: Doug McMillon
Pres/CEO - U.S.: John Furner
Area Stores: 159 (includes
SuperCenter/Neighborhood Mkt.)
Area Vol.: \$6.06 billion (grocery/
HBC only)



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IN REVIEW: FOOD LION

State	County	2023 Stores	2023 Sales (in millions)	2023 County Food Sales	% of 2023 County Market	2022 Stores	2022 Sales (in millions)	% of 2022 County Market
DE	Kent	4	\$32.30	\$560.60	5.76%	4	\$30.90	5.88%
DE	Sussex	9	\$146.80	\$1,078.40	13.61%	9	\$140.10	13.98%
DE Recap: 13 stores with sales of \$173.1 million. Total retail food sales for DE in the study: \$1.64 billion. Food Lion share of DE is 10.93%.								
MD	Anne Arundel	5	\$71.20	\$2,491.60	2.86%	5	\$68.90	2.96%
MD	Baltimore County	6	\$64.20	\$3,629.50	1.77%	6	\$61.10	1.77%
MD	Caroline	2	\$21.90	\$100.70	21.75%	2	\$21.10	24.59%
MD	Carroll	3	\$45.20	\$720.30	6.28%	3	\$43.80	6.36%
MD	Cecil	3	\$35.20	\$317.20	11.10%	3	\$34.30	11.85%
MD	Charles	3	\$43.50	\$564.80	7.70%	3	\$38.90	7.41%
MD	Dorchester	1	\$13.50	\$64.60	20.90%	1	\$12.80	21.51%
MD	Frederick	5	\$75.00	\$1,015.20	7.39%	5	\$73.10	7.56%
MD	Harford	2	\$10.90	\$1,113.40	0.98%	2	\$10.60	1.02%
MD	Howard	2	\$23.20	\$1,270.20	1.83%	2	\$22.50	1.87%
MD	Kent/MD	1	\$16.10	\$103.50	15.56%	1	\$15.80	15.48%
MD	Montgomery	1	\$11.80	\$3,963.80	0.30%	1	\$11.50	0.31%
MD	Prince George's	3	\$42.30	\$3,422.70	1.24%	3	\$40.80	1.27%
MD	Queen Anne's	2	\$24.90	\$163.90	15.19%	2	\$24.30	15.29%
MD	Somerset	2	\$28.10	\$46.20	60.82%	2	\$26.40	65.67%
MD	St. Mary's	2	\$31.80	\$375.20	8.48%	2	\$30.00	7.67%
MD	Washington	1	\$11.50	\$575.10	2.00%	1	\$11.50	2.07%
MD	Wicomico	4	\$40.30	\$318.60	12.65%	4	\$38.90	12.98%
MD	Worcester	4	\$63.10	\$241.60	26.12%	4	\$61.10	24.57%
MD Recap: 52 stores with sales of \$673.7 million. Total retail food sales for MD in the study: \$22.75 billion. Food Lion share of MD is 2.96%.								
PA	Franklin	1	\$11.40	\$480.20	2.37%	1	\$11.00	2.41%
PA	York	1	\$5.20	\$1,731.80	0.30%	1	\$4.90	0.30%
PA Recap: 2 stores with sales of \$16.6 million. Total retail food sales for PA in the study: \$7.31 billion. Food Lion share of PA is 0.23%.								
VA	Accomack	2	\$34.10	\$101.80	33.50%	2	\$33.20	32.94%
VA	Albemarle	6	\$68.40	\$699.10	9.78%	6	\$66.80	9.86%
VA	Caroline	2	\$17.80	\$43.80	40.64%	2	\$16.70	49.70%
VA	Chesapeake City	12	\$154.70	\$947.50	16.33%	12	\$147.50	16.64%
VA	Chesterfield	17	\$222.70	\$1,688.50	13.19%	17	\$212.80	14.18%
VA	Dinwiddie	4	\$40.80	\$143.40	28.45%	4	\$38.80	28.76%
VA	Essex	1	\$12.60	\$70.40	17.90%	1	\$11.70	17.54%
VA	Fairfax	2	\$31.80	\$6,001.60	0.53%	2	\$31.00	0.57%
VA	Fauquier	3	\$25.10	\$190.00	13.21%	3	\$23.60	12.53%
VA	Gloucester	2	\$24.20	\$136.30	17.75%	2	\$23.10	17.92%
VA	Goochland	3	\$36.90	\$47.30	78.01%	3	\$35.30	101.44%
VA	Greene	1	\$10.60	\$17.70	59.89%	1	\$9.70	55.11%
VA	Hampton/Newport News	16	\$298.70	\$1,331.60	22.43%	16	\$284.80	21.35%
VA	Hanover	6	\$75.20	\$515.60	14.58%	6	\$73.90	15.27%
VA	Henrico	14	\$205.10	\$2,024.70	10.13%	14	\$194.70	9.88%
VA	Isle of Wight	3	\$36.70	\$104.60	35.09%	3	\$35.80	39.13%
VA	James City	5	\$63.10	\$452.50	13.94%	5	\$60.20	14.12%
VA	King George	2	\$27.90	\$103.80	26.88%	2	\$26.60	27.54%
VA	King William	2	\$31.60	\$39.70	79.60%	2	\$30.90	79.64%
VA	Lancaster	1	\$15.60	\$88.60	17.61%	1	\$14.80	17.56%
VA	Loudoun	3	\$41.70	\$1,629.40	2.56%	3	\$39.50	2.57%
VA	Louisa	2	\$22.90	\$47.60	48.11%	2	\$22.50	45.27%
VA	Madison	1	\$14.80	\$15.00	98.67%	1	\$14.20	97.93%
VA	Mathews	1	\$14.90	\$15.30	97.39%	1	\$14.30	97.95%
VA	Middlesex	1	\$15.10	\$34.80	43.39%	1	\$14.40	46.91%
VA	New Kent	4	\$52.60	\$62.80	83.76%	3	\$35.70	68.79%
VA	Norfolk City	8	\$140.70	\$841.80	16.71%	8	\$134.90	17.07%

IN REVIEW: FOOD LION

State	County	2023 Stores	2023 Sales (in millions)	2023 County Food Sales	% of 2023 County Market	2022 Stores	2022 Sales (in millions)	% of 2022 County Market
VA	Northampton	2	\$22.80	\$41.90	54.42%	2	\$22.40	55.17%
VA	Northumberland	1	\$14.60	\$22.40	65.18%	1	\$14.20	66.36%
VA	Orange	3	\$30.90	\$148.20	20.85%	3	\$30.40	24.01%
VA	Page	2	\$12.10	\$71.70	16.88%	2	\$11.80	16.08%
VA	Portsmouth City	5	\$77.60	\$298.30	26.01%	5	\$73.90	26.71%
VA	Powhatan	2	\$24.80	\$80.20	30.92%	2	\$24.20	31.47%
VA	Prince George	2	\$22.70	\$81.90	27.72%	2	\$22.30	27.81%
VA	Prince William	9	\$140.90	\$2,149.40	6.56%	9	\$133.50	6.89%
VA	Richmond	1	\$14.70	\$24.10	61.00%	1	\$13.90	62.33%
VA	Shenandoah	3	\$44.90	\$122.80	36.56%	3	\$43.20	35.29%
VA	Southampton	2	\$31.50	\$97.50	32.31%	2	\$30.60	32.83%
VA	Spotsylvania	1	\$12.80	\$856.60	1.49%	1	\$12.40	1.51%
VA	Suffolk City	5	\$51.80	\$332.20	15.59%	5	\$51.20	16.57%
VA	Virginia Beach	21	\$270.50	\$1,801.80	15.01%	21	\$257.70	15.20%
VA	Westmoreland	2	\$28.10	\$50.20	55.98%	2	\$28.40	54.93%
VA	York	4	\$50.90	\$202.80	25.10%	4	\$48.80	26.70%

VA Recap: 189 stores with sales of \$2.59 billion. Total retail food sales for VA in the study: \$26.27 billion. Food Lion share of VA is 9.85%.

Mid-Atlantic Recap: 256 stores with sales of \$3.46 billion annually. Mid-Atlantic retail food sales total: \$60.6 billion.

Food Lion Per Store Average: \$13.5 million

Source: *Food World*, June 2023

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Eastern Shore Supermarket Leaders

- Food Lion Still Growing
- Albertsons Aided By Strong Comps
- Giant Is Per-Store Avg. Leader
- Aldi Adds Another Unit
- Redner's Finally Debuts In Lewes

Rank	Company	2023 Stores	2023 Sales (in millions)	% of 2023 Market	2022 Stores	2022 Sales (in millions)	% of 2022 Market
1	Food Lion	33	\$443.90	30.13%	33	\$427.00	30.09%
2	Albertsons (Acme/Safeway)	10	\$291.40	19.78%	10	\$283.60	20.35%
3	Giant Food	4	\$222.20	15.08%	4	\$211.29	15.16%
4	Redner's Markets	7	\$177.50	12.05%	6	\$148.50	10.65%
5	Weis Markets	4	\$71.85	4.88%	5	\$71.09	5.10%
6	Harris Teeter	3	\$71.00	4.82%	3	\$66.60	4.78%
7	Aldi	7	\$67.30	4.57%	6	\$52.90	3.80%
8	C&S Independents	12	\$47.89	3.25%	14	\$55.30	3.97%
9	International Markets	2	\$20.60	1.40%	2	\$19.50	1.40%
10	Save A Lot	3	\$16.80	1.14%	4	\$19.10	1.37%
		85	\$1,430.44	97.10%	87	\$1,354.88	97.06%

This chart lists the top 10 supermarket retailers in the Eastern Shore market. Counties/cities included are: Kent and Sussex in DE; Caroline, Dorchester, Kent, Queen Anne's, Somerset, Talbot, Wicomico and Worcester in MD; and Accomack and Northampton in VA. Petroleum sales are not included. () Indicates another banner used by the company.

Total supermarket sales for the area are \$1.47 billion.

Source: Food World, June 2023

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Food Markets

Eastern Shore Market Leaders

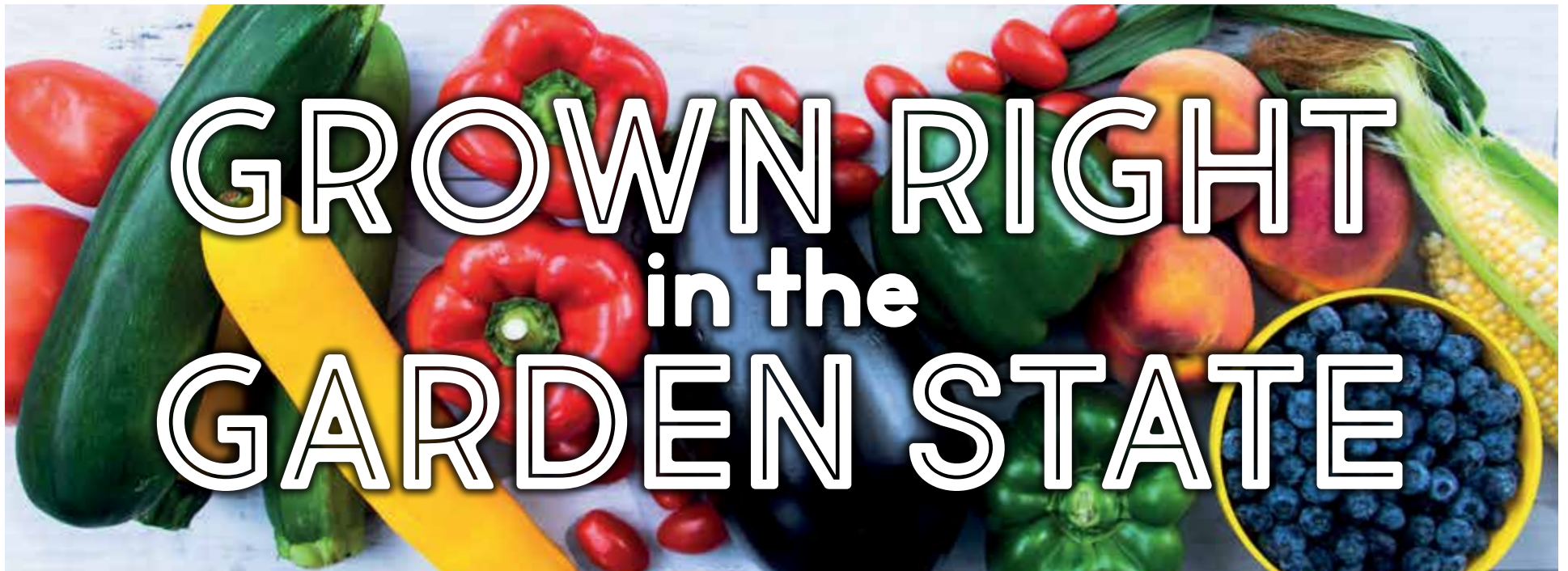
- Alts. Share Grows To 52.9%
- Walmart, Food Lion Dominate
- Drug Chain Share Shrinks To 12.9%
- C-Store Share Now At 15.5%
- C&S Indies Store Count Down 2

Rank	Company	2023 Stores	2023 Sales (in millions)	% of 2023 Market	2022 Stores	2022 Sales (in millions)	% of 2022 Market
1	Walmart (SuperCenter)	14	\$505.20	16.48%	14	\$473.40	16.37%
2	Food Lion	33	\$443.90	14.55%	33	\$427.00	14.46%
3	Albertsons (Acme/Safeway)	10	\$291.40	9.55%	10	\$283.60	9.81%
4	Giant Food	4	\$222.20	7.28%	4	\$211.29	7.31%
5	Wawa	23	\$200.71	6.58%	25	\$179.40	6.20%
6	Walgreens	33	\$193.30	6.34%	34	\$193.30	6.68%
7	Redner's Markets	7	\$177.50	5.82%	6	\$148.50	5.14%
8	Royal Farm Stores	59	\$158.00	5.18%	58	\$142.90	4.94%
9	Rite Aid	28	\$102.20	3.35%	28	\$98.00	3.39%
10	CVS	18	\$98.20	3.22%	18	\$94.50	3.27%
11	Sam's Club	2	\$87.80	2.88%	2	\$84.00	2.90%
12	BJ's Wholesale Club	2	\$81.80	2.68%	2	\$76.10	2.63%
13	Target	4	\$74.30	2.44%	4	\$70.60	2.44%
14	Weis Markets	4	\$71.85	2.35%	5	\$71.09	2.46%
15	Harris Teeter	3	\$71.00	2.33%	3	\$66.60	2.30%
16	Aldi	7	\$67.30	2.21%	6	\$52.90	1.83%
17	Fas-Marts	39	\$66.10	2.17%	40	\$68.70	2.38%
18	7-Eleven	19	\$49.10	1.61%	18	\$42.80	1.48%
19	C&S Independents	12	\$47.89	1.57%	14	\$55.30	1.91%
20	International Markets	2	\$20.60	0.68%	2	\$19.50	0.67%
		323	\$3,030.35	99.32%	326	\$2,859.48	99.30%

This chart lists the top 20 retailers in the Eastern Shore market which sell groceries, HBC, drugs, general merchandise and tobacco products. Volumes listed include 100% of store sales for supermarkets, c-stores and drug chains. Sales for club stores, Target and Walmart are extrapolated to include comparable categories, as explained in the formula on page 87. Petroleum sales are not included. Counties/cities included are: Kent and Sussex in DE; Caroline, Dorchester, Kent, Queen Anne's, Somerset, Talbot, Wicomico and Worcester in MD; and Accomack and Northampton in VA. () Indicates another banner used by the company.

Total food sales for the area are: \$3.07 billion.

Source: Food World, June 2023



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IN REVIEW: THE GIANT COMPANY

State	County	2023 Stores	2023 Sales (in millions)	2023 County Food Sales	% of 2023 County Market	2022 Stores	2022 Sales (in millions)	% of 2022 County Market
MD	Carroll (Martin's)	1	\$76.20	\$720.30	10.58%	1	\$73.78	10.71%
MD	Cecil (Martin's)	1	\$61.40	\$317.20	19.36%	1	\$58.22	20.11%
MD	Washington (Martin's)	4	\$180.30	\$575.10	31.35%	4	\$172.48	31.07%

MD Recap: 6 stores with sales of \$317.9 million. Total retail food sales for MD in the study: \$22.75 billion. The Giant Co. share of MD is 1.4%.

PA	Adams	1	\$65.70	\$219.60	29.92%	1	\$62.03	28.84%
PA	Cumberland	10	\$493.60	\$1,252.70	39.40%	10	\$472.87	39.19%
PA	Dauphin	9	\$471.50	\$1,104.00	42.71%	9	\$454.73	42.61%
PA	Franklin (Martin's)	4	\$163.80	\$480.20	34.11%	4	\$156.58	34.37%
PA	Lancaster	14	\$518.90	\$1,889.90	27.46%	14	\$494.13	26.67%
PA	Lebanon	3	\$97.10	\$487.60	19.91%	3	\$93.96	21.41%
PA	Perry	1	\$32.20	\$143.80	22.39%	1	\$30.77	26.73%
PA	York	10	\$570.60	\$1,731.80	32.95%	10	\$545.24	33.19%

PA Recap: 52 stores with sales of \$2.41 billion. Total retail food sales for PA in the study: \$7.31 billion. The Giant Co. share of PA is 33.02%.

VA	Culpeper (Martin's)	1	\$48.20	\$183.60	26.25%	1	\$45.94	26.49%
VA	Frederick (Martin's)	3	\$167.90	\$544.60	30.83%	3	\$161.83	30.98%
VA	Warren (Martin's)	1	\$65.10	\$170.40	38.20%	1	\$61.57	38.15%

VA Recap: 5 stores with sales of \$281.2 million. Total retail food sales for VA in the study: \$26.27 billion. The Giant Co. share of VA is 1.07%.

Mid-Atlantic Recap: 63 stores with sales of \$3.01 billion annually. Mid-Atlantic retail food sales total: \$60.6 billion.

The Giant Co. Per Store Average: \$47.82 million

() Indicates another banner used by the company.

Source: *Food World*, June 2023



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FOOD WORLD MARKET STUDY: RULES & ANALYSIS

from page 12
has existed for two decades, and both retailers performed well in the inflationary environment over the past year. Neither merchant opened any new stores in the 10 county/city Hampton Roads marketing area. Both chains marginally increased their market shares -18.12 percent vs. 18.08 percent for leader Food Lion; 16.14 percent vs. 16.09 percent for Walmart. Expect that battle to continue for many more years. Those that did make gains in the \$6.5 billion region included third-ranked 7-Eleven (six new c-stores), Wawa (three new c-stores stores), Aldi (one additional discount store) and convenience store/fuel station operator Miller Marts, which added 15 new stores to its portfolio. Also, a nice rebound for the five military commissaries in Tidewater - sales rose for the first time in nearly a decade from \$140.8 million to \$150 million this year. Expect some market change in the next 18-24 months when Publix enters the region with three new stores.

How We Do It?

This is the 45th year that we have published a food and drug sales market study for one of the largest regions in the U.S. All of us at Best-Met Publishing are very proud of producing the only market study of its kind that comprehensively breaks out sales and share for all classes of trade that sell food and drug, on a county-by-county basis. The methodology of constructing Food World's annual market reference resource involves more elbow grease than creativity.

In February, we begin to collect and update our store lists from all of the retailers involved in the study. We compare these lists to those

from previous years on a county-by-county basis. The 12-month measuring period we analyzed runs from April 1, 2022 through March 31, 2023.

To qualify for inclusion in the study, supermarkets must operate at least two stores, and convenience stores must have at least 19 corporate units (although not necessarily all in this region). We do not include the sales of petroleum products for c-stores, club units or mass merchants, nor do we measure fuel sales from supermarkets that sell gas. Additionally, drug retailers must have at least five stores to qualify for the study. All club stores are included, as are limited assortment stores (Aldi, Lidl, Save A Lot, Price Rite), military commissaries, Walmart and Target

In early April, after the 12-month measuring period has ended, we check back with all retailers in the study for late-breaking openings, closings, sales or acquisitions.

We then contact the retailers again, directly asking them to provide us with specific information on a county-by-county basis. Our batting average with supermarkets remains greater than 90 percent in collecting this data.

For the c-stores, clubs, drug chains and mass merchandisers, our success rate is about 80 percent.

Sales data for military commissaries is publicly available.

For retailers that will not give us their volumes directly, we employ a number of sources: former and present employees, vendors familiar with specific accounts, and outside consultants. We use consultants primarily in collecting data about the mass and club channels. Our volume factoring system includes total sales produced by supermarkets, as well as 100 percent of sales recorded by drug chains, military commis-

saries and convenience stores (again, excluding fuel).

Based on publicly-available data from Walmart (Sam's Club), Target, Costco and BJ's, whose sales breakouts by department continues to skew more heavily toward grocery, drug, health and beauty care and general merchandise (HBC and GM), we now factor in that 62 percent of sales at Walmart's 95 SuperCenters in the region are derived from grocery, drug, HBC and GM. For the 65 conventional Walmart ("Division One") discount stores remaining in the market, we utilize an extrapolated percentage of 47 percent of total store sales. We continue to include 100 percent of Walmart's Neighborhood store sales.

At Target, that food/general merchandise percentage is 46 percent and for the three Super Target stores in Northern Virginia we estimate that 54 percent of sales come from grocery/GM. CVS controls the drug sales at most Targets.

The three club operators - Costco, BJ's and Sam's Club - also have highly skewed sales towards grocery, drug, HBC and GM, which we now estimate at 67 percent of store volume.

And while 100 percent of all conventional Kroger stores sales are included, that ratio is 70 percent when measuring volume at the Kroger's seven Marketplace Foods in the region.

If a store opened during the course of the year (but was not open for all 52 weeks) we annualize volumes based on a weekly average. For new replacement stores we apply a "blended" formula combining old store sales with new volumes achieved at the replacement. If a store closed during our measuring period, it is eliminated from our survey

and no sales from that shuttered unit are included.

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Obviously, publishing a market study that requires such detail and focus can only be accomplished with a great team effort. And we've got a dream team - dedicated, intelligent, passionate and fun to work with.

Our team consists of Terri Maloney, VP-editorial director; Maria Maggio, VP-general manager of Food Trade News; Kevin Gallagher, VP-Metro New York and New England; and Beth Pripstein, office and circulation manager.

And once again, a special shout-out to Terri Maloney. In her 23 years as editor (she has been with Best-Met for 34 years), Terri has piloted every aspect of the grueling Market Study process which includes data collection (involving hundreds of changes each year), IT through-put, pre-press coordination, proofreading and printer communication.

There are also a number of other people who've contributed to this issue and to our overall success that I want to thank.

Our pre-press and graphics team of Jenny Jones and her boss Matt Danielson at E-Ink, who we have partnered with us for more than 25 years, continue to do a stellar job of helping get the final product ready for all three of our publications - *Food World*, *Food Trade News* and our annual *Grocery Industry Directory*.

Kudos, too, to our printer - Evergreen Printing in Bellmawr, NJ - another entrepreneurial enterprise that

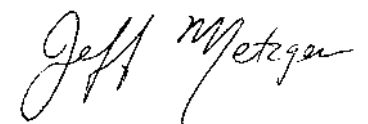
prioritizes customer service and quality. We salute Thom Scirrotto, Mike McBain, Chris Geimer, Tanya Erickson and the entire Evergreen team for their continued good work.

Also, Matt Casey and Bob Gorland from Matthew P. Casey & Associates, both personal friends whose retail estate guidance and overall market acumen are invaluable.

This past month has been particularly difficult for me. When I began my career in Boston in 1973 in Boston, there was one man who taught me the ropes of the business. He also provided me with guidance and mentorship about how life really works - so many lessons that remain imprinted today. Last month, Dick Bestany passed away, a week shy of his 84th birthday. As partners for nearly 30 years and friends for a half a century, Dick's impact on my life and many others, was deep and enduring. More of my thoughts about my brother-in-arms can be found in my column "Taking Stock." May he rest in heavenly peace.

This is my 50th year of reporting about the grocery industry (yikes, that's scary). There's been lots of change, some of it for the better. As long as I can tolerate the inevitable evolution of our great business, I'll soldier on, hoping that we can provide the information that our readers still find interesting and at times valuable.

Before I close, I again want to thank our readers for supporting our publications and website. I also want to acknowledge the important role of our advertisers. Without you, we simply wouldn't exist.



Jeff Metzger

IN REVIEW: WHOLE FOODS

State	County	2023 Stores	2023 Sales (in millions)	2023 County Food Sales	% of 2023 County Market	2022 Stores	2022 Sales (in millions)	% of 2022 County Market
DC	Washington (Amazon Fresh)	8	\$319.60	\$2,617.30	12.21%	8	\$305.80	12.34%
DC Recap: 8 stores with sales of \$319.6 million. Total retail food sales for DC in the study: \$2.62 billion. Whole Foods share of DC is 12.21%.								
MD	Anne Arundel	1	\$55.80	\$2,491.60	2.24%	1	\$52.60	2.26%
MD	Baltimore City	2	\$63.50	\$1,581.30	4.02%	2	\$67.80	4.43%
MD	Baltimore County	1	\$33.10	\$3,629.50	0.91%	1	\$31.70	0.92%
MD	Howard	1	\$43.00	\$1,270.20	3.39%	1	\$37.00	3.08%
MD	Montgomery (Amazon Fresh)	7	\$264.50	\$3,963.80	6.67%	6	\$242.30	6.43%
MD	Prince George's	1	\$34.90	\$3,422.70	1.02%	1	\$33.10	1.03%
MD Recap: 13 stores with sales of \$494.8 million. Total retail food sales for MD in the study: \$22.75 billion. Whole Foods share of MD is 2.18%.								
PA	Lancaster	1	\$39.10	\$1,889.90	2.07%	1	\$37.30	2.01%
PA Recap: 1 store with sales of \$39.1 million. Total retail food sales for PA in the study: \$7.31 billion. Whole Foods share of PA is 0.53%.								
VA	Albemarle	1	\$37.40	\$699.10	5.35%	1	\$35.90	5.30%
VA	Arlington (Amazon Fresh)	3	\$91.60	\$1,054.20	8.69%	2	\$79.80	8.28%
VA	Fairfax (Amazon Fresh)	10	\$331.10	\$6,001.60	5.52%	8	\$297.20	5.42%
VA	Hampton/Newport News	1	\$32.80	\$1,331.60	2.46%	1	\$32.60	2.44%
VA	Henrico	2	\$47.10	\$2,024.70	2.33%	2	\$44.90	2.28%
VA	Loudoun	1	\$34.20	\$1,629.40	2.10%	1	\$33.10	2.15%
VA	Prince William (Amazon Fresh)	1	\$8.20	\$2,149.40	0.38%	0	\$0.00	0.00%
VA	Virginia Beach	1	\$36.50	\$1,801.80	2.03%	1	\$34.70	2.05%
VA Recap: 20 stores with sales of \$618.9 million. Total retail food sales for VA in the study: \$26.27 billion. Whole Foods share of VA is 2.36%.								

Mid-Atlantic Recap: 42 stores with sales of \$1.47 billion annually. Mid-Atlantic retail food sales total: \$60.6 billion.

Whole Foods Per Store Average: \$35.06 million

() Name in parentheses indicates another banner used by the company.

Source: *Food World*, June 2023

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Guy Giordano, President and CEO
Vincent Giordano Corporation

IN REVIEW: KROGER

State	County	2023 Stores	2023 Sales (in millions)	2023 County Food Sales	% of 2023 County Market	2022 Stores	2022 Sales (in millions)	% of 2022 County Market
VA	Albemarle	3	\$148.20	\$699.10	21.20%	3	\$140.80	20.79%
VA	Chesapeake City (Marketplace)	3	\$131.70	\$947.50	13.90%	3	\$123.20	13.90%
VA	Chesterfield (Marketplace)	7	\$274.50	\$1,688.50	16.26%	7	\$260.20	17.34%
VA	Gloucester	1	\$22.50	\$136.30	16.51%	1	\$20.80	16.14%
VA	Hampton/Newport News	1	\$33.20	\$1,331.60	2.49%	1	\$32.40	2.43%
VA	Hanover (Marketplace)	2	\$104.20	\$515.60	20.21%	2	\$98.80	20.41%
VA	Henrico (Marketplace)	9	\$301.20	\$2,024.70	14.88%	9	\$285.80	14.50%
VA	Isle Of Wight	1	\$29.10	\$104.60	27.82%	1	\$27.80	30.38%
VA	Portsmouth City (Marketplace)	1	\$43.50	\$298.30	14.58%	1	\$41.40	14.96%
VA	Suffolk City (Marketplace)	2	\$77.10	\$332.20	23.21%	2	\$72.60	23.50%
VA	Virginia Beach (Marketplace)	5	\$159.80	\$1,801.80	8.87%	5	\$151.10	8.91%
VA	York	2	\$44.70	\$202.80	22.04%	2	\$43.30	23.69%

VA Recap: 37 stores with sales of \$1.37 billion. Total retail food sales for VA in the study: \$26.27 billion. Kroger share of VA is 5.21%.

Mid-Atlantic Recap: 37 stores with sales of \$1.37 billion annually. Mid-Atlantic retail food sales total: \$60.6 billion.

Kroger Per Store Average: \$37.02 million

() Name in parentheses indicates another banner used by the company.

Source: *Food World*, June 2023



Nourishing families and communities

From our roots as a grocery store started in 1937, to beloved national food manufacturer and a local Market Hall of today, Ukrop's strives to nourish the lives of our customers and their communities. From our family to yours, it's always a pleasure to serve you. Contact us to learn more.

BRANDY SEAY | SALES ACCOUNT DIRECTOR

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Central Pennsylvania Supermarket Leaders

- The Giant Company Share: 54%
- Weis Share Approaching 20%
- Grocery Outlet Adds 2 Stores
- Little Overall Growth In CPA
- C&S Now Supplies 49 Indies

Rank	Company	2023 Stores	2023 Sales (in millions)	% of 2023 Market	2022 Stores	2022 Sales (in millions)	% of 2022 Market
1	The Giant Co. (Martin's)	52	\$2,413.40	53.93%	52	\$2,310.31	53.11%
2	Weis Markets	38	\$886.88	19.82%	38	\$872.88	19.80%
3	C&S Independents	49	\$218.71	4.89%	51	\$233.30	5.36%
4	Karns Prime & Fancy Foods	10	\$188.00	4.20%	10	\$184.00	4.23%
5	Aldi	15	\$136.10	3.04%	15	\$129.40	2.97%
6	Wegmans	2	\$130.40	2.91%	2	\$125.70	2.89%
7	Family Owned Markets	7	\$125.81	2.81%	7	\$121.80	2.80%
8	Grocery Outlet	12	\$79.60	1.78%	10	\$63.20	1.45%
9	Redner's Markets	3	\$52.40	1.17%	3	\$50.30	1.16%
10	IGA	5	\$47.85	1.07%	5	\$49.40	1.14%
		193	\$4,279.15	95.40%	193	\$4,140.29	95.18%

This chart above the top 10 supermarket retailers in the Central Pennsylvania market. Counties/cities included are: Adams, Cumberland, Dauphin, Franklin, Lancaster, Lebanon, Perry and York. Petroleum sales are not included. () Name in parentheses indicates another banner used by the company.

Total supermarket sales for the area are \$4.47 billion.

Source: Food World, June 2023

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Central Pennsylvania Market Leaders

- Alts. Still Stymied By Supers, At 37%
- TGC's ACV Share Breaks 33% Mark
- WM, Target Control 13.9%
- Led By Sheetz, C-Stores Take 9.6%
- CVS Remains Top Drug Merchant

Rank	Company	2023 Stores	2023 Sales (in millions)	% of 2023 Market	2022 Stores	2022 Sales (in millions)	% of 2022 Market
1	The Giant Co. (Martin's)	52	\$2,413.40	33.02%	52	\$2,310.31	32.94%
2	Weis Markets	38	\$886.88	12.13%	38	\$872.88	12.15%
3	Walmart (SuperCenter)	20	\$786.40	10.76%	20	\$745.50	10.66%
4	CVS	72	\$357.30	4.89%	73	\$342.90	4.90%
5	Sheetz	72	\$300.70	4.11%	71	\$281.30	4.02%
6	Target	12	\$231.10	3.16%	11	\$202.00	2.89%
7	C&S Independents	49	\$218.71	2.99%	51	\$233.30	3.34%
8	Rite Aid	60	\$210.10	2.87%	60	\$201.60	2.88%
9	Karns Prime & Fancy Foods	10	\$188.00	2.57%	10	\$184.00	2.63%
10	Turkey Hill	118	\$187.50	2.57%	117	\$177.20	2.53%
11	Sam's Club	4	\$179.10	2.45%	4	\$168.60	2.41%
12	Rutter's Farm Stores	69	\$144.50	1.98%	69	\$137.20	1.96%
13	Aldi	15	\$136.10	1.86%	15	\$129.40	1.85%
14	Wegmans	2	\$130.40	1.78%	2	\$125.70	1.80%
15	BJ's Wholesale Club	4	\$120.70	1.65%	4	\$114.10	1.63%
16	Family Owned Markets	7	\$115.81	1.58%	7	\$121.80	1.74%
17	Costco	2	\$93.70	1.28%	2	\$88.50	1.27%
18	Grocery Outlet	12	\$79.60	1.09%	10	\$63.20	0.90%
19	7-Eleven	26	\$67.40	0.92%	24	\$60.50	0.87%
20	Redner's Markets	3	\$52.40	0.72%	3	\$50.30	0.72%
		647	\$6,899.80	94.39%	643	\$6,610.29	94.27%

This chart lists the top 20 retailers in the Central Pennsylvania market which sell groceries, HBC, drugs, general merchandise and tobacco products. Volumes listed include 100% of store sales for supermarkets, c-stores and drug chains. Sales for club stores, Target and Walmart are extrapolated to include comparable categories, as explained in the formula on page 87. Petroleum sales are not included. Counties/cities included are: Adams, Cumberland, Dauphin, Franklin, Lancaster, Lebanon, Perry and York. () Indicates another banner used by the company.

Total food sales for the area are: **\$7.31 billion.**

Source: Food World, June 2023

Mrs. T's Pierogies

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DRIVE FROZEN FOOD SALES WITH THIS ULTIMATE FAMILY FAVORITE!

Mrs. T's Pierogies is helping drive consumers down the frozen food aisle! Get ready for sales and profits with this ultimate family favorite. **Stuffed with the stuff they love, plus the profitability you love.**

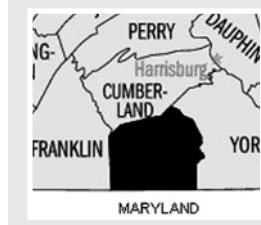
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PENNSYLVANIA COUNTY SHARE OF MARKET: 2023

Total sales for those Pennsylvania counties included in the study are **\$7.31 billion**

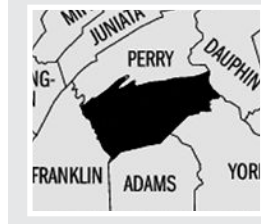
Rank	Company	Stores	Sales (in millions)	% of Market
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ADAMS COUNTY (\$219.6 million) (Includes Gettysburg, Littlestown)

• Population	106,027	• Female	50.5%
• # of Households	39,908	• White	88.4%
• Median Income	\$72,492	• Black	2.1%
• Under age 18	19.7%	• Hispanic	7.4%
• Over age 65	21.5%	• Asian	0.9%

1	The Giant Co.	1	\$65.70	29.92%
2	Weis Markets	2	\$40.83	18.59%
3	IGA	3	\$31.72	14.44%
4	Walmart	1	\$23.40	10.66%
5	Sheetz	4	\$18.90	8.61%
6	Rutter's Farm Stores	4	\$9.90	4.51%
7	Rite Aid	2	\$6.20	2.82%
8	7-Eleven	2	\$5.90	2.69%
9	CVS	1	\$5.70	2.60%
10	Turkey Hill	2	\$3.70	1.68%
11	Royal Farm Stores	1	\$2.90	1.32%
		23	\$214.85	97.84%



CUMBERLAND COUNTY (\$1.3 billion) (Includes Carlisle, Mechanicsville)

• Population	268,579	• Female	50.0%
• # of Households	102,532	• White	82.8%
• Median Income	\$77,001	• Black	5.3%
• Under age 18	20.6%	• Hispanic	4.8%
• Over age 65	18.8%	• Asian	5.4%

1	The Giant Co.	10	\$493.60	39.40%
2	Walmart (SuperCenter)	4	\$125.70	10.03%
3	Weis Markets	5	\$106.46	8.50%
4	Karns Prime & Fancy Foods	4	\$76.00	6.07%
5	Wegmans	1	\$61.40	4.90%
6	CVS	12	\$56.80	4.53%
7	Sheetz	14	\$55.80	4.45%
8	Rite Aid	12	\$46.50	3.71%
9	BJ's Wholesale Club	1	\$40.40	3.23%
10	Aldi	4	\$38.10	3.04%
11	Target	2	\$37.20	2.97%
12	Sam's Club	1	\$34.90	2.79%
13	Trader Joe's	1	\$19.90	1.59%
14	Grocery Outlet	2	\$14.90	1.19%
15	7-Eleven	5	\$13.10	1.05%
16	Turkey Hill	8	\$12.30	0.98%

17	Rutter's Farm Stores	5	\$11.30	0.90%
18	Military Commissaries	1	\$10.81	0.86%
		92	\$1,255.17	100.2%*



DAUPHIN COUNTY (\$1.1 billion) (Includes Harrisburg, Middletown, Millersburg)

• Population	288,800	• Female	51.1%
• # of Households	115,703	• White	62.8%
• Median Income	\$66,480	• Black	19.2%
• Under age 18	22.6%	• Hispanic	10.7%
• Over age 65	17.7%	• Asian	6.4%

1	The Giant Co.	9	\$471.50	42.71%
2	Walmart (SuperCenter)	2	\$84.80	7.68%
3	Weis Markets	4	\$71.33	6.46%
4	CVS	13	\$65.20	5.91%
5	Karns Prime & Fancy Foods	3	\$60.00	5.43%
6	Costco	1	\$58.30	5.28%
7	Sheetz	12	\$56.40	5.11%
8	Rite Aid	12	\$43.00	3.89%
9	Sam's Club	1	\$38.80	3.51%
10	Target	2	\$31.30	2.84%
11	7-Eleven	10	\$23.90	2.16%
12	Aldi	2	\$19.80	1.79%
13	Turkey Hill	16	\$19.60	1.78%
14	ShopRite (Price Rite)	1	\$16.60	1.50%
15	Sharp Shopper	1	\$11.90	1.08%
16	Boyer's Markets	1	\$11.34	1.03%
17	Save A Lot	1	\$6.30	0.57%
18	C&S Independents	4	\$5.59	0.51%
19	Rutter's Farm Stores	2	\$4.50	0.41%
20	ASG	1	\$0.96	0.09%
		98	\$1,101.12	99.74%



FRANKLIN COUNTY (\$480.2 million) (Includes Chambersburg, Greencastle, Waynesboro)

• Population	156,902	• Female	50.7%
• # of Households	61,854	• White	86.5%
• Median Income	\$66,329	• Black	4.4%
• Under age 18	22.0%	• Hispanic	6.7%
• Over age 65	20.1%	• Asian	1.1%

1	The Giant Co. (Martin's)	4	\$163.80	34.11%
2	Walmart (SuperCenter)	2	\$86.10	17.93%
3	Weis Markets	2	\$38.24	7.96%
4	Sheetz	8	\$33.10	6.89%
5	BJ's Wholesale Club	1	\$31.20	6.50%
6	CVS	5	\$23.10	4.81%
7	Target	1	\$18.60	3.87%

See PENNSYLVANIA COUNTY SHARE on page 94

TAKING STOCK

from page 69

sales approaching \$5 billion annually. Smith remained chief executive until 1999 until he stepped down, noting, "After nearly 30 years of hard work, it is time to retire and give the company a management team to lead it into the next millennium. I can think of no better time to make these changes than the present, as Food Lion is in excellent shape, financially and operationally." When he retired at the age of 57, Food Lion operated nearly 1,000 stores and employed more than 100,000 associates. I met Tom Smith many times in the 1980s and 1990s - he was truly a country gentleman who acted with humility and grace and possessed a strong work ethic with a lot of street smarts...Pasquale Caputo, better known as comedian Pat Cooper, passed away earlier this month at the age of 93. Cooper's career began in the early 1960s with multiple appearances on the "Jackie Gleason Show" and the "Ed Sullivan Show" as a PG-rated comedian. Cooper was pretty funny, but when he worked at private clubs (especially the Friars Club in New York) his bluer material was hilarious. In fact, he appeared in one episode of "Seinfeld" playing himself at the Friars Club. Cooper, who was born in Brooklyn, unfurled his New York "attitude" during his many appearances on the Howard Stern Show, where his cranky persona resonated with Stern's off-the-wall listeners. His 2010 autobiography "How Dare You Say How Dare Me!" is certainly worth reading...also departing the planet was Jim Brown, 87, who in my book remains the greatest running back in the history of the NFL. Brown was not only a great football player, he was also one of the best college lacrosse players of all time. Playing for the Cleveland Browns from 1957 to 1965, Brown's punishing straight-ahead running style made him the most difficult player in the league to tackle. And once he broke free, his sprinter's speed made him nearly impossible to catch in the open field. "All you can do is grab, hold, hang on and wait for help," said Sam Huff, who faced Brown in more than 30 games as a Hall of Fame linebacker for the New York Giants and Washington Redskins. All told, in his nine-year career Brown rushed for 12,312 yards (an NFL record that stood until it was broken by Walter Payton in 1984). In 1963, Brown rushed for 1,863 yards (a single-season record until it was broken by O.J. Simpson a decade later) and was elected to the Pro Football Hall of Fame in 1971, his first year of eligibility (he was also elected to the College Football Hall of Fame in 1995 and the National Lacrosse Hall of Fame in 1984). Brown retired from the NFL after the 1965 season in order to concentrate on a film career. He appeared in nearly 60 movies and TV shows, the best of which, in my opinion, was "The Dirty Dozen" (1967), in which he played Robert T. Jefferson, one of 12 convicts assembled by the Army to conduct a dangerous mission to kill ranking German officers prior to D-Day. Brown's life was not without controversy, but as a football player, he was unparalleled...it is with sadness that we also report the death of Tina Turner, one of the greatest R&B singers and live performers of all time. Turner died last month in her home in Switzerland at the age of 83. Born in rural Tennessee, Turner was discovered as a teenager by bandleader and future husband Ike Turner. The band, known as the Ike Turner Revue (later the Ike and Tina Turner Revue), electrified audiences with their tight arrangements, great dancing and Tina's powerful vocals. The "Revue" enjoyed several Top Ten hits ("River Deep, Mountain High" and "Proud Mary") but it wasn't until Tina left her abusive husband and launched her solo career with hits like "Private Dancer" and "What's Love Got To Do With It?" that she became a true superstar. Turner and her ex-husband were elected to the Rock & Roll Hall of Fame in 1991, and in 2021 she was inducted again as a solo artist. During her sensational 50-year career, Turner won eight Grammy Awards, a Kennedy Center honor in 2005 and a Grammy Lifetime Achievement award in 2018. What a voice, what a performer.

Hail, Hail To One Of The Greatest! The Industry Will Miss Dick Bestany

Last month, after a lengthy illness, we lost Richard J. Bestany. His formal obituary will read that he was a former company president who spent nearly 40 years in and around the food industry and was a loving family man. All true.

TAKING STOCK continues on page 107

Keeping it Close to Home

At Redner's, family values and traditions drive everything we do. An employee- and locally-owned food company, we believe in supporting local business and agriculture to strengthen our communities. Serving Berks County and beyond since 1970, we provide:

- Locally-sourced, fresh products
- Convenient and affordable options
- Outstanding service

Our employee-owners work to provide the best shopping experience for our customers every day.



REDNER'S | REDNER'S

— fresh market —

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rednersmarkets.com

PENNSYLVANIA COUNTY SHARE OF MARKET: 2023

Continued from page 92

8	Rite Aid	4	\$16.50	3.44%
9	Rutter's Farm Stores	7	\$16.10	3.35%
10	Food Lion	1	\$11.40	2.37%
11	Aldi	1	\$8.10	1.69%
12	Save A Lot	2	\$8.00	1.67%
13	Grocery Outlet	1	\$7.10	1.48%
14	C&S Independents	5	\$6.92	1.44%
15	Walgreens	1	\$6.30	1.31%
16	Turkey Hill	1	\$2.60	0.54%
		46	\$477.16	99.37%




LANCASTER COUNTY (\$1.9 billion)
(Includes Lancaster, Ephrata)

- Population 556,629
- # of Households 207,291
- Median Income \$73,688
- Under age 18 23.3%
- Over age 65 18.8%
- Female 50.7%
- White 80.5%
- Black 5.5%
- Hispanic 11.5%
- Asian 2.7%

1	The Giant Co.	14	\$518.90	27.46%
2	Weis Markets	13	\$315.94	16.72%
3	Walmart (SuperCenter)	3	\$145.40	7.69%
4	CVS	24	\$121.20	6.41%
5	Turkey Hill	63	\$103.80	5.49%
6	C&S Independents	23	\$88.61	4.69%
7	Family Owned Markets	4	\$88.26	4.67%
8	Wegmans	1	\$69.00	3.65%
9	Sheetz	17	\$68.70	3.64%
10	Target	3	\$62.40	3.30%
11	Whole Foods	1	\$39.10	2.07%
12	Costco	1	\$35.40	1.87%
13	Aldi	4	\$35.20	1.86%
14	Wawa	4	\$29.28	1.55%
15	BJ's Wholesale Club	1	\$26.80	1.42%
16	Sharp Shopper	2	\$24.90	1.32%
17	Grocery Outlet	4	\$24.30	1.29%
18	Rite Aid	6	\$18.10	0.96%
19	Redner's Markets	1	\$15.30	0.81%
20	High's/Baltimore	4	\$12.80	0.68%
21	Rutter's Farm Stores	5	\$11.80	0.62%
22	7-Eleven	4	\$8.30	0.44%
23	Lidl	1	\$6.90	0.37%
24	Walgreens	1	\$5.80	0.31%
25	Save A Lot	1	\$4.90	0.26%


26	IGA	1	\$4.43	0.23%
27	Royal Farm Stores	1	\$2.50	0.13%
		207	\$1,888.02	99.90%



LEBANON COUNTY (\$487.6 million)
(Includes Lebanon)

- Population 26,581
- # of Households 10,389
- Median Income \$35,609
- Under age 18 25.0%
- Over age 65 14.4%
- Female 50.4%
- White 49.2%
- Black 4.0%
- Hispanic 44.1%
- Asian 1.1%

1	The Giant Co.	3	\$97.10	19.91%
2	Walmart (SuperCenter)	2	\$91.30	18.72%
3	Weis Markets	3	\$68.34	14.02%
4	C&S Independents	6	\$54.21	11.12%
5	Redner's Markets	2	\$37.10	7.61%
6	CVS	5	\$23.80	4.88%
7	Turkey Hill	11	\$19.20	3.94%
8	Target	1	\$18.90	3.88%
9	Rite Aid	5	\$17.90	3.67%
10	ShopRite (Price Rite)	1	\$14.30	2.93%
11	Grocery Outlet	2	\$11.10	2.28%
12	Sheetz	2	\$9.10	1.87%
13	America's Food Basket	1	\$7.80	1.60%
14	Aldi	1	\$7.70	1.58%
15	Save A Lot	1	\$6.60	1.35%
16	Rutter's Farm Stores	2	\$4.80	0.98%
17	7-Eleven	1	\$2.60	0.53%
		49	\$491.25	100.87%*



PERRY COUNTY (\$143.6 million)
(Includes New Bloomfield)

- Population 46,114
- # of Households 17,823
- Median Income \$72,922
- Under age 18 21.2%
- Over age 65 19.8%
- Female 49.0%
- White 94.6%
- Black 1.4%
- Hispanic 2.4%
- Asian 0.5%

1	The Giant Co.	1	\$32.20	22.39%
2	Karns Prime & Fancy Foods	2	\$32.00	22.25%
3	C&S Independents	6	\$29.21	20.31%
4	Weis Markets	1	\$20.75	14.43%
5	Rite Aid	3	\$14.20	9.87%
6	Sheetz	2	\$11.60	8.07%
7	Rutter's Farm Stores	1	\$2.90	2.02%
		16	\$142.86	99.35%

See PENNSYLVANIA COUNTY SHARE on page 96

Thank you

to our vendor partners
and Mid-Atlantic
community for your
business and support.

We appreciate your
partnership and look
forward to continued
growth together.

Sincerely,
Mid-Atlantic

a division of  Albertsons
Companies

The Mid-Atlantic Team



ACME

KINGS

BALDUCCI'S

SAFEWAY

PENNSYLVANIA COUNTY SHARE OF MARKET: 2023

Continued from page 94



YORK COUNTY (\$1.7 billion) (Includes Hanover, Shrewsbury, York)

- Population 461,058
- # of Households 176,428
- Median Income \$72,543
- Under age 18 21.9%
- Over age 65 18.3%
- Female 50.2%
- White 81.4%
- Black 7.5%
- Hispanic 8.9%
- Asian 1.6%

1	The Giant Co.	10	\$570.60	32.91%
2	Walmart (SuperCenter)	6	\$229.70	13.25%
3	Weis Markets	8	\$224.99	12.99%
4	Sam's Club	2	\$105.40	6.07%
5	Rutter's Farm Stores	43	\$83.20	4.60%
6	Target	3	\$62.70	3.59%
7	CVS	12	\$61.50	3.53%
8	Rite Aid	16	\$47.70	2.72%
9	Sheetz	13	\$47.10	2.72%
10	Family Owned Markets	3	\$37.55	2.17%
11	C&S Independents	5	\$34.17	1.97%
12	Aldi	3	\$27.20	1.57%

13	Turkey Hill	17	\$26.30	1.51%
14	Royal Farm Stores	8	\$22.80	1.29%
15	BJ's Wholesale Club	1	\$22.30	1.29%
16	Grocery Outlet	3	\$22.20	1.28%
17	Karns Prime & Fancy Foods	1	\$20.00	1.15%
18	Walgreens	3	\$17.90	1.01%
19	ShopRite (PriceRite)	1	\$14.80	0.85%
20	Great Valu	1	\$13.80	0.79%
21	7-Eleven	4	\$13.60	0.77%
22	IGA	1	\$11.70	0.66%
23	Lidl	1	\$7.10	0.41%
24	Food Lion	1	\$5.20	0.30%
25	Save A Lot	1	\$4.40	0.25%
26	High's/Baltimore	1	\$3.30	0.19%
27	ASG	1	\$1.63	0.09%
		169	\$1,738.84	99.94%

() Name in parentheses indicates another banner used by the company.

*Combined retailer sales exceed 100% due to spill-in from other areas. Because of consumers purchasing items in one county, but residing in an adjacent one, or due to summer tourist traffic, leakage can occur. County food sales are formulated from population and annual expenditures of county residents.

Source: Food World, June 2023



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weis
markets

”

IN REVIEW: WEIS MARKETS

State	County	2023 Stores	2023 Sales (in millions)	2023 County Food Sales	% of 2023 County Market	2022 Stores	2022 Sales (in millions)	% of 2022 County Market
DE	Sussex	3	\$60.36	\$1,078.40	5.60%	4	\$60.24	6.01%
DE Recap: 3 stores with sales of \$60.36 million. Total retail food sales for DE in the study: \$1.64 billion. Weis Markets share of DE is 3.68%.								
MD	Anne Arundel	3	\$48.96	\$2,491.60	1.97%	3	\$46.80	2.01%
MD	Baltimore County	12	\$276.91	\$3,629.50	7.63%	12	\$275.81	7.99%
MD	Calvert	3	\$46.19	\$423.20	10.91%	3	\$41.82	10.50%
MD	Carroll	5	\$97.32	\$720.30	13.51%	5	\$97.01	14.08%
MD	Charles	1	\$12.56	\$564.80	2.22%	1	\$11.68	2.22%
MD	Frederick	6	\$144.90	\$1,015.20	14.27%	6	\$140.39	14.52%
MD	Harford	2	\$49.69	\$1,113.40	4.46%	2	\$48.78	4.70%
MD	Howard	3	\$61.75	\$1,270.20	4.86%	3	\$60.27	5.01%
MD	Montgomery	2	\$27.07	\$3,963.80	0.68%	2	\$25.59	0.68%
MD	Prince George's	3	\$38.27	\$3,422.70	1.12%	3	\$36.20	1.12%
MD	St. Mary's	2	\$39.03	\$375.20	10.40%	2	\$35.23	9.00%
MD	Talbot	1	\$11.49	\$243.80	4.71%	1	\$10.85	4.76%
MD	Washington	3	\$70.42	\$575.10	12.24%	3	\$72.89	13.13%
MD Recap: 46 stores with sales of \$924.56 million. Total retail food sales for MD in the study: \$22.75 billion. Weis Markets share of MD is 4.06%.								
PA	Adams	2	\$40.83	\$219.60	18.59%	2	\$43.16	20.07%
PA	Cumberland	5	\$106.46	\$1,252.70	8.50%	5	\$109.93	9.11%
PA	Dauphin	4	\$71.33	\$1,104.00	6.46%	4	\$71.75	6.72%
PA	Franklin	2	\$38.24	\$480.20	7.96%	2	\$36.22	7.95%
PA	Lancaster	13	\$315.94	\$1,889.90	16.72%	13	\$308.27	16.64%
PA	Lebanon	3	\$68.34	\$487.60	14.02%	3	\$65.55	14.94%
PA	Perry	1	\$20.75	\$143.80	14.43%	1	\$19.46	16.91%
PA	York	8	\$224.99	\$1,731.80	12.99%	8	\$218.54	13.30%
PA Recap: 38 stores with sales of \$886.88 million. Total retail food sales for PA in the study: \$7.31 billion. Weis Markets share of PA is 12.13%.								
VA	Culpeper	1	\$13.93	\$183.60	7.59%	1	\$12.26	7.07%
VA	Spotsylvania	5	\$59.78	\$856.60	6.98%	5	\$55.20	6.71%
VA	Stafford	3	\$36.76	\$441.60	8.32%	3	\$36.02	8.23%
VA Recap: 9 stores with sales of \$110.47 million. Total retail food sales for VA in the study: \$26.27 billion. Weis Markets share of VA is 0.42%.								

**Mid-Atlantic Recap: 96 stores with sales of \$1.98 billion annually. Mid-Atlantic retail food sales total: \$60.6 billion.
Weis Markets Per Store Average: \$20.65 million**

Source: Food World, June 2023

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Richmond Supermarket Leaders

- Kroger Holds Serve At 32.3%
- Food Lion Getting Closer At 31.2%
- Publix Remains Number 3
- Aldi Adds New Location
- Wegmans Tops In Per-Store Avg.

Rank	Company	2023 Stores	2023 Sales (in millions)	% of 2023 Market	2022 Stores	2022 Sales (in millions)	% of 2022 Market
1	Kroger (Marketplace)	18	\$679.90	32.28%	18	\$644.80	32.19%
2	Food Lion	50	\$658.10	31.24%	49	\$615.40	31.09%
3	Publix	16	\$261.00	12.39%	16	\$247.10	12.48%
4	Wegmans	2	\$135.50	6.43%	2	\$130.00	6.42%
5	Aldi	13	\$97.40	4.62%	12	\$92.60	4.68%
6	International Markets	6	\$58.90	2.80%	6	\$56.60	2.86%
7	Whole Foods	2	\$47.10	2.24%	2	\$44.90	2.27%
8	Lidl	6	\$42.70	2.03%	6	\$40.10	2.03%
9	Trader Joe's	2	\$42.10	2.00%	2	\$39.80	1.99%
10	The Fresh Market	4	\$41.50	1.97%	4	\$40.00	2.02%
		119	\$2,064.20	98.00%	117	\$1,951.30	97.87%

This chart lists the top 10 supermarket retailers in the Richmond market. Counties/cities included are: Charles City, Chesterfield, Dinwiddie, Goochland, Hanover, Henrico, New Kent and Powhatan. Petroleum sales are not included.

() Name in parentheses indicates another banner used by the company.

Total supermarket sales for the area are \$2.11 billion.

Source: Food World, June 2023

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Richmond Market Leaders

- Alts. Share Grows To 53.2%
- WM Extends Lead Over Kroger
- Food Lion Aided By Strong Comps
- WM, Target Now Control 20.7%
- BJ's Bolstered By New Club Unit

Rank	Company	2023 Stores	2023 Sales (in millions)	% of 2023 Market	2022 Stores	2022 Sales (in millions)	% of 2022 Market
1	Walmart (SC/Neighborhood Mkt)	18	\$749.90	16.42%	18	\$706.70	16.31%
2	Kroger (Marketplace)	18	\$679.90	14.88%	18	\$644.80	14.85%
3	Food Lion	50	\$658.10	14.41%	49	\$615.40	14.35%
4	Wawa	31	\$295.60	6.47%	33	\$309.50	7.27%
5	CVS	58	\$293.00	6.41%	58	\$278.90	6.55%
6	7-Eleven	100	\$268.30	5.87%	96	\$240.90	5.66%
7	Publix	16	\$261.00	5.71%	16	\$247.10	5.80%
8	Walgreens	32	\$203.10	4.45%	34	\$203.40	4.78%
9	Target	12	\$195.30	4.28%	12	\$183.20	4.30%
10	Wegmans	2	\$135.50	2.97%	2	\$130.00	3.05%
11	BJ's Wholesale Club	3	\$131.60	2.88%	2	\$77.60	1.82%
12	Sam's Club	3	\$100.80	2.21%	3	\$107.00	2.51%
13	Costco	2	\$100.60	2.20%	2	\$100.70	2.36%
14	Aldi	13	\$97.40	2.13%	12	\$92.60	2.17%
15	International Markets	6	\$58.90	1.29%	6	\$56.60	1.33%
16	Sheetz	14	\$51.10	1.12%	13	\$46.30	1.09%
17	Whole Foods	2	\$47.10	1.03%	2	\$44.90	1.05%
18	Lidl	6	\$42.70	0.93%	6	\$40.10	0.94%
19	Fas-Marts	27	\$42.60	0.93%	27	\$41.50	0.97%
20	Trader Joe's	2	\$42.10	0.92%	2	\$39.80	0.93%
		415	\$4,454.60	97.52%	411	\$4,207.00	97.46%

Chart lists top 20 retailers in the Richmond market which sell groceries, HBC, drugs, GM and tobacco products. Volumes listed include 100% of store sales for supermarkets, c-stores and drug chains. Sales for club stores, Target and Walmart are extrapolated to include comparable categories, as explained in the formula on page 87. Petroleum sales are not included. Counties/cities included are: Charles City, Chesterfield, Dinwiddie, Goochland, Hanover, Henrico, New Kent and Powhatan. () Indicates another banner used by the company. **Total food sales for the area are: \$4.57 billion.** Source: Food World, June 2023

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Richmond-Norfolk Supermarket Leaders

- Food Lion Grows R-N Share
- Kroger's Share Flat, Still #2
- Wegmans Still Per-Avg. Leader
- Aldi Adds 2 New Locations
- TJ's Benefits From Excellent IDs

		2023	2023 Sales	% of 2023	2022	2022 Sales	% of 2022
Rank	Company	Stores	(in millions)	Market	Stores	(in millions)	Market
1	Food Lion	155	\$2,119.30	37.21%	154	\$2,015.60	37.16%
2	Kroger (Marketplace)	37	\$1,369.70	24.05%	37	\$1,298.20	24.03%
3	Harris Teeter	25	\$655.10	11.50%	25	\$621.90	11.51%
4	Wegmans	4	\$283.60	4.98%	4	\$271.00	5.02%
5	Publix	17	\$274.90	4.83%	17	\$260.50	4.82%
6	Aldi	33	\$268.90	4.72%	31	\$244.40	4.52%
7	Whole Foods	5	\$153.80	2.70%	5	\$148.10	2.74%
8	Lidl	16	\$124.10	2.18%	17	\$125.60	2.32%
9	Trader Joe's	6	\$120.80	2.12%	6	\$114.60	2.12%
10	The Fresh Market	9	\$113.20	1.99%	9	\$108.30	2.00%
		307	\$5,483.40	96.27%	305	\$5,208.20	96.22%

Chart lists the top 10 supermarket retailers in the Richmond-Norfolk market. Counties/cities included are: Albemarle, Caroline, Charles City, Chesapeake City, Chesterfield, Cumberland, Dinwiddie, Essex, Gloucester, Goochland, Greene, Hampton/Newport News City, Hanover, Henrico, Isle of Wight, James City, King & Queen, Lancaster, Louisa, Mathews, Middlesex, New Kent, Norfolk City, Northumberland, Nottoway, Orange, Portsmouth City, Powhatan, Prince George, Richmond, Southampton, Suffolk City, Surry, Sussex, Virginia Beach City and York. Petroleum sales are not included. () Indicates alternate banner used by the company.

Total supermarket sales for the area are \$5.7 billion.

Source: Food World, June 2023

Richmond-Norfolk Market Leaders

- Alts. Share Flat Again: 49.2%
- FL, WM, Kroger Control 43.6%
- 7-Eleven Still Dominant C-Store
- Mass Merchants Capture 19.8%
- Drug Chains Combine For 10.7%

		2023	2023 Sales	% of 2023	2022	2022 Sales	% of 2022
Rank	Company	Stores	(in millions)	Market	Stores	(in millions)	Market
1	Food Lion	155	\$2,119.30	16.99%	154	\$2,015.60	16.96%
2	Walmart (SC/Neighborhood Mkt)	54	\$2,069.10	16.58%	54	\$1,956.10	16.50%
3	Kroger (Marketplace)	37	\$1,369.70	10.98%	37	\$1,298.20	10.95%
4	7-Eleven	399	\$957.00	7.67%	387	\$870.20	7.40%
5	Harris Teeter	25	\$655.10	5.25%	25	\$621.90	5.29%
6	CVS	120	\$620.80	4.98%	120	\$589.10	5.01%
7	Wawa	69	\$573.85	4.60%	68	\$519.73	4.42%
8	Walgreens	84	\$493.60	3.96%	86	\$478.40	4.07%
9	Target	26	\$398.50	3.19%	25	\$359.30	3.05%
10	Sam's Club	8	\$294.60	2.36%	8	\$289.90	2.46%
11	Wegmans	4	\$283.60	2.27%	4	\$271.00	2.30%
12	BJ's Wholesale Club	7	\$278.00	2.23%	6	\$216.10	1.84%
13	Publix	17	\$274.90	2.20%	17	\$260.50	2.21%
14	Aldi	33	\$268.90	2.16%	31	\$244.40	2.08%
15	Costco	5	\$237.80	1.91%	5	\$229.60	1.95%
16	Rite Aid	60	\$219.00	1.76%	66	\$229.50	1.95%
17	Military Commissaries	6	\$179.19	1.44%	6	\$161.92	1.38%
18	Whole Foods	5	\$153.80	1.23%	5	\$148.10	1.26%
19	Lidl	16	\$124.10	0.99%	17	\$125.60	1.07%
20	Trader Joe's	6	\$120.80	0.97%	6	\$114.60	0.97%
		1,136	\$11,691.64	93.71%	1,127	\$10,999.75	93.50%

Chart lists the top 20 retailers in the R-N market which sell groceries, HBC, drugs, GM and tobacco products. Volumes listed include 100% of store sales for supermarkets, c-stores and drug chains. Sales for club stores, Target and Walmart are extrapolated to include comparable categories, as explained in the formula on page 87. Petroleum sales not included. Counties/cities included are: Albemarle, Caroline, Charles City, Chesapeake City, Chesterfield, Cumberland, Dinwiddie, Essex, Gloucester, Goochland, Greene, Hampton/N News City, Hanover, Henrico, Isle of Wight, James City, King & Queen, Lancaster, Louisa, Mathews, Middlesex, New Kent, Norfolk City, Northumberland, Nottoway, Orange, Portsmouth City, Powhatan, Pr. George, Richmond, Southampton, Suffolk City, Surry, Sussex, Virginia Beach City, York. () Alternate banner. Total food sales for the area are: \$12.48 billion.

Source: Food World, June 2023

GREAT BALLS OF FIRE

By Duke Winston

Walmart Extends Lead In Richmond Food Lion Remains King of Tidewater

The good news is that all the leading retailers in the Richmond and Tidewater markets experienced record or near-record annual sales gains for the period of 4/1/22-3/31/23. The not so good news is that those increases were primarily driven by inflation. That does not bode well for food retailers here and in other markets as signs of a sales slowdown have become more pronounced in the past two months.

Until a few years ago, the \$12.5 billion combined marketing area witnessed not only new competitors (Wegmans, Publix, Lidl) but more than two dozen new stores. That new store growth has virtually dried up, making the market even more competitive. And because of that fierce competition and an economic shift by many of the larger players from brick and mortar to digital, it's been difficult even for Walmart, Kroger and Food Lion (Ahold Delhaize USA) to significantly move the share of market needle.

As Big Duke has done every year since 1979, here's my analysis of the leading retailers in the Richmond and Tidewater market over the past 12 months.

Walmart – Remained the market leader in Richmond and ranked second again in Tidewater (to Food Lion) with the same number of stores (54) as last year. The Bentonville Behemoth was able to turn its low price image into better comp sales and a small share of market gain versus the competition. It's clear that Walmart is doing more curbside pickup business with its digitally connected online platform, and in recent months its in-store service levels have improved. And yet, the world's largest retailer still ranks behind its other retail competitors in terms of store conditions and overall customer service. Imagine if it ever focuses more on making its stores easier and more comfortable places to shop?

Kroger – Kroger's comp store sales were solid – and like its competitors, stoked by inflation. As Big Duke noted last year, the stores seem a bit tired, but like a workhouse, the company's 18 Richmond area stores and 16 Tidewater units (not including Harris Teeter) continue to produce high volumes. One of its best stores in Mechanicsville VA will be replaced in the next 18 month with a new, larger Marketplace combo unit. Don't expect much other new store activity as the big chain is corporately focused on completing its merger agreement with Albertsons. That process should stretch into mid-2024.

See **GREAT BALLS** on page 109

PER STORE AVERAGES: 2023

Rank	Company	Stores	2023 Sales (in millions)	Per Store Avg. (in millions)
1	Wegmans	26	\$2,370.00	\$91.15
2	Costco*	30	\$2,031.60	\$67.72
3	The Giant Co. (Martin's)	63	\$3,012.50	\$47.82
4	Sam's Club*	26	\$1,116.60	\$42.95
5	Giant Food	161	\$6,377.00	\$39.61
6	BJ's Wholesale Club*	30	\$1,175.60	\$39.19
7	Walmart (SC/Neighborhood Mkt)*	159	\$6,061.50	\$38.12
8	Kroger (Marketplace)	37	\$1,369.70	\$37.02
9	Whole Foods (Amazon Fresh)	42	\$1,472.40	\$35.06
10	Harris Teeter	78	\$2,529.00	\$32.42

() Name in parentheses indicates another banner used by the company.

* Sales are extrapolated to include food, GM, HBC, floral, tobacco and pharmacy as explained on page 87.

Source: Food World, June 2023

WASHINGTON, DC SHARE OF MARKET: 2023

DISTRICT OF COLUMBIA (\$2.6 billion)	
• Population	670,050
• # of Households	310,104
• Median Income	\$93,547
• Under age 18	18.3%
• Over age 65	12.2%
• Female	52.4%
• White	36.7%
• Black	44.7%
• Hispanic	11.3%
• Asian	4.2%

Rank	Company	Stores	Sales (in millions)	% of Market
1	CVS	55	\$484.80	18.52%
2	Albertsons (Safeway)	12	\$389.60	14.89%
3	Whole Foods (Amazon Fresh)	8	\$319.60	12.21%
4	Giant Food	7	\$292.40	11.17%
5	Harris Teeter	3	\$166.50	6.36%
6	Trader Joe's	5	\$150.20	5.74%
7	International Markets	12	\$145.80	5.57%
8	Target	5	\$105.60	4.03%
9	Wegmans	1	\$90.70	3.47%
10	7-Eleven	41	\$76.50	2.92%
11	Walmart (SuperCenter)	2	\$70.90	2.71%
12	Costco	1	\$70.80	2.71%
13	Walgreens	8	\$65.30	2.49%
14	Streets Market	6	\$49.20	1.88%
15	Wawa	6	\$19.83	0.76%
16	Military Commissaries	1	\$16.20	0.62%
17	MOM's Organic Market	1	\$15.90	0.61%
18	Aldi	1	\$13.60	0.52%
19	Lidl	1	\$9.80	0.37%
		176	\$2,553.23	97.55%

() Name in parentheses indicates another banner used by the company.

Source: Food World, June 2023

Inflation Continues To Bolster Revenue; Giant, Walmart, CVS Remain Market Leaders

from page 1

again not opening any new stores (in fact, it closed a store in Washington, DC) as it continued to focus on its growing digital business. Extrapolated food and drug sales at its 160 stores increased to an estimated \$6.06 billion and the Bentonville, AR merchant significantly benefited from gains in customer counts, transaction size and overall inflation.

CVS, the largest drug chain in the region, retained its third-place ranking in the market. The Woonsocket, RI-based drug merchant was also the only drug chain (of the “big three”) to not close a significant number of the stores during the past year. CVS now operates 631 drug stores in the region (seven fewer than last year), which amassed an estimated \$3.77 billion in annual sales.

Remaining in fourth place among all Mid-Atlantic merchants was Food Lion which continued to be the best performing

brand in the ADUSA portfolio. The Salisbury, NC-based grocery chain now operates 256 stores (one more than last year) in the 89-county region and compiled estimated annual revenue of \$3.46 billion.

Albertsons Mid-Atlantic, which includes the Safeway, Acme, Kings and Balducci's banners, maintained the momentum that was created when the division was formed in 2020. The regional arm of the large Boise, ID-based chain continued to operate 124 stores and rang up estimated annual sales of \$3.36 billion. In October 2022, Albertsons and Kroger announced they have agreed to merge, although approval or rejection of the nearly \$25 billion deal is still about a year away.

The Giant Company (TGC), the ADUSA brand based in Carlisle, PA, remained sixth-ranked among all grocery retailers in the Mid-Atlantic region. Sales at its 63 Giant and Martin's stores (same as last year) in Pennsylvania, Maryland and Virginia rose to an esti-

mated \$3.01 billion.

Continuing to upgrade its stores and moving up one spot this year was convenience store leader 7-Eleven, which maintained its improved performance level over the past 12 months. Operating both corporately-owned and franchised c-stores, the Dallas, TX-based operator, which is owned by Japanese juggernaut Seven & I Holdings, now operates 1,122 stores in the Mid-Atlantic which produced an estimated \$2.62 billion in annual sales.

Harris Teeter is now in eighth place in the Mid-Atlantic region. The Matthews, NC-based Kroger subsidiary rang up estimated sales of \$2.53 billion at its 78 area stores. Industry veteran Tammy DeBoer now has a full year under her belt (she replaced the now-retired Rod Antolock as president of the regional chain in 2022).

Moving from 11th to ninth among Mid-Atlantic retailers was Wegmans which opened three high volume stores during the market study measuring period –

Alexandria, VA; Washington, DC; and Reston, VA. Sales spiraled from an estimated \$2.00 billion last year to an estimated \$2.37 billion for its current 26 stores in the region.

Rounding out the area's top 10 was Target. The Minneapolis-based mass merchant now operates 114 area units (three more than last year). The company also runs nearly a dozen smaller urban models as well as three SuperTarget locations. Target also benefited handsomely from food price inflation. During the past 12 months, estimated extrapolated sales grew from \$2.05 billion last year to \$2.22 billion this year.

Other retailers that topped the \$1 billion mark in annual sales in the 89-county region included: the 137 “International Markets” (specialty and ethnic supermarkets that are at least 20,000 square feet in size are grouped together in this survey). Collectively, those stores rang up estimated annual sales of \$2.04 billion; Costco - 30 stores, estimated extrapolated an-

nual sales of \$2.03 billion (one of the best performers in the region); Weis Markets with 96 stores and annual revenue of \$1.98 billion; Walgreens - 317 stores and \$1.90 billion in estimated annual sales; Whole Foods, with 34 natural and organic stores and now eight Amazon Fresh units that together amassed an estimated annual revenue of \$1.47 billion (in February 2023, parent company Amazon said it would “pause” all future store openings of its Amazon Fresh banner); regional convenience store power Wawa (another stellar performer this year), whose 185 c-stores (eight more than last year) rang up annual sales of \$1.39 billion; Kroger, which operated 37 conventional stores and Marketplace stores in the Mid-Atlantic and garnered estimated annual sales of \$1.37 billion; Aldi with 144 stores (seven more than last year) and estimated annual revenue of \$1.26 billion; fast-growing

See **MARKET STUDY**
on page 105



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MARKET STUDY

from page 104

BJ's Wholesale Club - 30 stores (one more than last year) with estimated extrapolated annual sales of \$1.18 billion; and Sam's Club (a unit of Walmart), which operates 26 club units in the Mid-Atlantic region, which amassed an extrapolated annual volume estimate of \$1.17 billion.

By class of trade, the leaders are: supermarkets - Giant Food (Landover) with 161 stores, \$6.38 billion in sales; clubs - Costco with 30 stores, \$2.03 billion in extrapolated sales; mass - Walmart with 160 stores, \$6.06 billion in extrapolated sales; drug - CVS with 631 stores and \$3.77 billion in estimated sales; and convenience stores - 7-Eleven with 1,122 stores and an estimated \$2.62 billion in revenue.

Additionally, the 20 military commissaries in the region rang up annual sales of \$535.9 million, the first gain at the government-subsidized stores in five years.

Viewed as a group, the 48 corporate chains in the market operated 5,176 stores and accrued an

estimated \$59.4 billion in annual sales, good for 98.04 percent of the Mid-Atlantic region's \$60.6 billion food and drug market.

Among all independent retailers (those operating between two and 17 stores), Mechanicsburg, PA-based Karns Prime & Fancy Foods led all merchants with annual sales of \$188 million at its 10 Central PA stores. Baltimore-based B. Green, which operates stores under the Green Valley and Food Depot banners, ranked second among all indies with seven stores and \$167.8 million in annual volume. Also surpassing the \$100 million sales mark was Family Owned Markets, the Millersville, PA retail marketing group that handles eight independent stores in Central PA and northern MD that had annual sales of \$146.1 million.

As a combined group, the 10 multi-store independent retail organizations in the Mid-Atlantic operated 54 supermarkets which garnered estimated annual sales of \$831.7 million. Collectively, those stores controlled 1.37 percent of the region's food and drug revenue. Dropping out of the survey this year was McKay's Food &

Drug, which closed its last four southern MD stores in 2022.

Major news stories over the past year included the proposed Kroger-Albertsons merger; the first unionization at an Amazon fulfillment center (in Staten Island); the resignation of Nicholas Bertram as president of The Giant Company (to be replaced on an interim basis by veteran TGC executive John Ruane); the appointment of Leon Bergmann as CEO of troubled discounter Save A Lot; the halting of future Amazon Fresh stores (more than 30 locations are still under lease); the housecleaning of senior management at Chesapeake, VA-based Dollar Tree Stores; the transfer of Albertsons Mid-Atlantic president (and company EVP) Jim Perkins to corporate headquarters in Boise, ID to run potential merger spinoff, SpinCo (Tom Lofland was named president); and the naming of Cub Foods/UNFI executive Mike Stigers as Wakefern's president who this month replaced Joe Sheridan, who was with the largest wholesale food-coop in the country for 48-years, the last 12 as the Keasbey, NJ firm's day-to-day leader.



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Tidewater Supermarket Leaders

- Food Lion Again Extends Lead
- HT Holds 20% Market Share
- Inflation Aids Kroger Comps
- Discounters: Aldi Paces Lidl
- Wegmans Still Poppin' In VA Bch.

		2023	2023 Sales	% of 2023	2022	2022 Sales	% of 2022
Rank	Company	Stores	(in millions)	Market	Stores	(in millions)	Market
1	Food Lion	81	\$1,168.90	40.90%	81	\$1,117.90	40.84%
2	Harris Teeter	22	\$576.80	20.18%	22	\$547.30	20.15%
3	Kroger (Marketplace)	16	\$541.60	18.95%	16	\$512.60	18.87%
4	Aldi	19	\$162.60	5.69%	18	\$143.50	5.28%
5	Lidl	9	\$72.80	2.55%	10	\$77.70	2.86%
6	Wegmans	1	\$72.70	2.54%	1	\$69.10	2.54%
7	The Fresh Market	5	\$71.70	2.51%	5	\$68.30	2.51%
8	Whole Foods	2	\$69.30	2.42%	2	\$67.30	2.48%
9	Trader Joe's	3	\$55.90	1.96%	3	\$53.30	1.96%
10	International Markets	3	\$42.80	1.50%	3	\$40.40	1.49%
		161	\$2,835.10	99.21%	161	\$2,697.40	99.20%

The chart above lists the top 10 supermarket retailers in the Tidewater market. Counties/cities included are: Chesapeake City, Gloucester, Hampton/Newport News City, Isle of Wight, James City, Norfolk City, Portsmouth City, Suffolk City, Virginia Beach City and York. Petroleum sales are not included. () Indicates alternate banner used by the company.

Total supermarket sales for the area are **\$2.86 billion**.

Source: Food World, June 2023

Tidewater Market Leaders

- Alts. Still Control More Than 50%
- Food Lion Remains Mkt. Leader
- Food Lion Helped By Inflation
- Strong IDs Boost Walmart
- Commissaries Make Slight Comeback

		2023	2023 Sales	% of 2023	2022	2022 Sales	% of 2022
Rank	Company	Stores	(in millions)	Market	Stores	(in millions)	Market
1	Food Lion	81	\$1,168.90	18.12%	81	\$1,117.90	18.08%
2	Walmart (SC/Neighborhood Mkt)	29	\$1,040.90	16.14%	29	\$984.80	16.09%
3	7-Eleven	273	\$624.80	9.69%	267	\$575.50	9.40%
4	Harris Teeter	22	\$576.80	8.94%	22	\$547.30	8.94%
5	Kroger (Marketplace)	16	\$541.60	8.40%	16	\$512.60	8.37%
6	Wawa	38	\$278.25	4.31%	35	\$210.23	3.43%
7	CVS	47	\$258.30	4.01%	47	\$244.20	3.99%
8	Walgreens	42	\$236.60	3.67%	42	\$224.20	3.66%
9	Rite Aid	50	\$182.30	2.83%	56	\$194.50	3.18%
10	Target	12	\$170.10	2.64%	12	\$160.50	2.62%
11	Sam's Club	4	\$165.60	2.57%	4	\$156.40	2.56%
12	Aldi	19	\$162.60	2.52%	18	\$143.50	2.34%
13	Military Commissaries	5	\$151.02	2.34%	5	\$140.79	2.30%
14	BJ's Wholesale Club	4	\$146.40	2.27%	4	\$138.50	2.26%
15	Costco	2	\$93.90	1.46%	2	\$88.50	1.45%
16	Lidl	9	\$72.80	1.13%	10	\$77.70	1.27%
17	Wegmans	1	\$72.70	1.13%	1	\$69.10	1.13%
18	The Fresh Market	5	\$71.70	1.11%	5	\$68.30	1.12%
19	Whole Foods	2	\$69.30	1.07%	2	\$67.30	1.10%
20	Miller Marts	32	\$60.10	0.93%	17	\$30.20	0.49%
		693	\$6,144.67	95.28%	675	\$5,752.02	95.19%

Chart lists top 20 retailers in the Tidewater market which sell groceries, HBC, drugs, GM and tobacco products. Volumes listed include 100% of store sales for supermarkets, c-stores and drug chains. Sales for club stores, Target and Walmart are extrapolated to include comparable categories, as explained in the formula on page 87. Petroleum sales not included. Counties/cities included: Chesapeake City, Gloucester, Hampton/Newport News City, Isle of Wight, James City, Norfolk, Portsmouth City, Suffolk City, Virginia Beach City and York. () Alt. banner. Total food sales for the area are: **\$6.45 billion**. Source: Food World, June 2023

TAKING STOCK

from page 93

But Dick Bestany was far more than that. He was my friend for 50 years and my business partner for 30. But he was even more than that. Dick was a born leader, a truly independent thinker and one of the nicest people I've ever met in my 72 years on the planet. He was a mentor to many and seemingly a friend to all. He possessed that rare skill that, after spending time with Dick, people always felt better about themselves.

And beyond his skills as a successful businessman, Dick was the life of the party - every party! He literally lived the old adage of "I never went out to have a bad time." He was a master at seamlessly blending business and entertainment. He really enjoyed people and they really liked him as a person and respected him as a businessman who had a unique perspective on the entire grocery business in the Mid-Atlantic. And as much fun as Dick and his cadre of industry buddies had, he never forgot that advertising revenue drove our business. So, when it came time to "ask for the order," Dick always had his priorities in place.

In the 30 years we spent as business partners (not including the five years we spent together at *The Griffin Report* in Boston), the disagreements we had were few and far between. That's because Dick always gave me the freedom and respect that enabled us to stay in our lanes and I ultimately learned so much from how he dealt with people and the significant pressures of the business. I never minded playing the "bad cop" (I figured it came with the territory), but Dick really enjoyed being the "good cop."

From our early days of holding court at Clyde's in Columbia, MD where we met so many executives and "characters" in the business, to the later years where we spent untold numbers of nights at Boccaccio in Baltimore's Little Italy, Dick was the president of the social club; if the food industry ever formed a formal fraternity he would have been John Belushi.

Dick's unique set of skills and the credibility of *Food World* and *Food Trade News* allowed us to meet and befriend many industry leaders including Jerry Chadwick (both senior and junior), Izzy Cohen, Jim Donald, Bernie Ellis, David Finkelstein, Bill Grize, Dave Herriman, Pete Manos, Bernie Mazer, Pat McCarthy, Mike Wilson, Dick McCready, John Paterakis, Frank Rich, Larry Roney, Don Smith, Joanne Stathes, Pete Riley, Mark Tarzwell, Bob Tobin and Bill White, to name some notables. But we just didn't rub elbows with these industry heavyweights - we became their peers where mutual trust was almost a given.

Or as Dick used to say, "Sometimes I feel like a priest hearing confession." He was right, but the key to those relationships was the faith that those secrets would never be revealed. And they never were.

Where did the time go? I can vividly remember my first day at *The Griffin Report* in 1973. When I was a green 22-year-old in my first real job, Dick (who was VP-advertising at the time) made my entry comfortable. "Work hard, have fun and follow me," were his inspiring and calming words.

Fifty years later, those words still ring true. It's been a great ride - I'm only sorry Dick won't be with me to finish the journey.

May you rest in peace, my brother!

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IN REVIEW: ALDI

State	County	2023 Stores	2023 Sales (in millions)	2023 County Food Sales	% of 2023 County Market	2022 Stores	2022 Sales (in millions)	% of 2022 County Market
DC	Washington	1	\$13.60	\$2,617.30	0.52%	1	\$12.90	0.52%
DC Recap: 1 store with sales of \$13.6 million. Total retail food sales for DC in the study: \$2.62 billion. Aldi share of DC is 0.52%.								
DE	Kent	3	\$25.10	\$560.60	4.48%	3	\$24.40	4.64%
DE	Sussex	1	\$11.30	\$1,078.40	1.05%	1	\$9.10	0.91%
DE Recap: 4 stores with sales of \$36.4 million. Total retail food sales for DE in the study: \$1.64 billion. Aldi share of DE is 2.22%.								
MD	Anne Arundel	7	\$68.00	\$2,491.60	2.73%	6	\$55.10	2.37%
MD	Baltimore City	4	\$26.90	\$1,581.30	1.70%	4	\$25.90	1.69%
MD	Baltimore County	11	\$76.20	\$3,629.50	2.10%	11	\$73.90	2.14%
MD	Caroline	1	\$10.30	\$100.70	10.23%	0	\$0.00	0.00%
MD	Carroll	2	\$17.90	\$720.30	2.49%	2	\$17.20	2.50%
MD	Cecil	1	\$9.10	\$317.20	2.87%	1	\$8.60	2.97%
MD	Charles	2	\$10.30	\$564.80	1.82%	1	\$9.70	1.85%
MD	Frederick	2	\$21.80	\$1,015.20	2.15%	2	\$21.10	2.18%
MD	Harford	4	\$21.20	\$1,113.40	1.90%	3	\$20.20	1.95%
MD	Howard	1	\$12.80	\$1,270.20	1.01%	1	\$12.10	1.01%
MD	Montgomery	8	\$74.30	\$3,963.80	1.87%	8	\$70.20	1.86%
MD	Prince George's	13	\$116.20	\$3,422.70	3.39%	12	\$102.50	3.18%
MD	St. Mary's	1	\$8.50	\$375.20	2.27%	1	\$7.90	2.02%
MD	Talbot	1	\$8.90	\$243.80	3.65%	1	\$8.40	3.69%
MD	Washington	2	\$14.80	\$575.10	2.57%	2	\$15.10	2.72%
MD	Wicomico	1	\$11.70	\$318.60	3.67%	1	\$11.00	3.67%
MD Recap: 61 stores with sales of \$508.9 million. Total retail food sales for MD in the study: \$22.75 billion. Aldi share of MD is 2.24%.								
PA	Cumberland	4	\$38.10	\$1,252.70	3.04%	4	\$36.20	3.00%
PA	Dauphin	2	\$19.80	\$1,104.00	1.79%	2	\$18.90	1.77%
PA	Franklin	1	\$8.10	\$480.20	1.69%	1	\$7.80	1.71%
PA	Lancaster	4	\$35.20	\$1,889.90	1.86%	4	\$33.30	1.80%
PA	Lebanon	1	\$7.70	\$487.60	1.58%	1	\$7.10	1.62%
PA	York	3	\$27.20	\$1,731.80	1.57%	3	\$26.10	1.59%
PA Recap: 15 stores with sales of \$136.1 million. Total retail food sales for PA in the study: \$7.31 billion. Aldi share of PA is 1.86%.								
VA	Albemarle	1	\$8.90	\$699.10	1.27%	1	\$8.30	1.23%
VA	Chesapeake City	3	\$19.10	\$947.50	2.02%	3	\$18.10	2.04%
VA	Chesterfield	6	\$43.10	\$1,688.50	2.55%	5	\$40.80	2.72%
VA	Culpeper	1	\$9.90	\$183.60	5.39%	1	\$9.30	5.36%
VA	Fairfax	13	\$129.40	\$6,001.60	2.16%	13	\$122.90	2.24%
VA	Frederick	1	\$9.10	\$544.60	1.67%	1	\$8.20	1.57%
VA	Gloucester	1	\$11.40	\$136.30	8.36%	1	\$10.50	8.15%
VA	Hampton/Newport News	3	\$26.10	\$1,331.60	1.96%	3	\$24.80	1.86%
VA	Hanover	1	\$9.20	\$515.60	1.78%	1	\$8.60	1.78%
VA	Henrico	6	\$45.10	\$2,024.70	2.23%	6	\$43.20	2.19%
VA	James City	1	\$8.80	\$452.50	1.94%	1	\$8.20	1.92%
VA	Loudoun	4	\$42.70	\$1,629.40	2.62%	4	\$40.20	2.62%
VA	Norfolk City	3	\$25.20	\$841.80	2.99%	2	\$13.90	1.76%
VA	Portsmouth City	1	\$9.20	\$298.30	3.08%	1	\$8.40	3.04%
VA	Prince William	6	\$66.80	\$2,149.40	3.11%	6	\$63.10	3.26%
VA	Spotsylvania	3	\$18.10	\$856.60	2.11%	3	\$17.00	2.07%
VA	Stafford	1	\$8.80	\$441.60	1.99%	1	\$8.00	1.83%
VA	Suffolk City	1	\$12.10	\$332.20	3.64%	1	\$11.30	3.66%
VA	Virginia Beach	6	\$50.70	\$1,801.80	2.81%	6	\$48.30	2.85%
VA	Warren	1	\$8.10	\$170.40	4.75%	1	\$7.60	4.71%
VA Recap: 63 stores with sales of \$561.8 million. Total retail food sales for VA in the study: \$26.27 billion. Aldi share of VA is 2.14%.								

**Mid-Atlantic Recap: 144 stores with sales of \$1.26 billion annually. Mid-Atlantic retail food sales total: \$60.6 billion.
Aldi Per Store Average: \$8.73 million**

Source: Food World, June 2023

GREAT BALLS OF FIRE

from page 103

Food Lion – The division of Ahold Delhaize USA continues to prove that it is the “little engine that could.” Strong comp sales (the best in the entire Ahold Delhaize universe), strong in-stock levels and improving customer service have been the hallmarks of Food Lion over the past five years. President Meg Ham has done an excellent job of creating a marked differential from her bigger box competitors. A snapshot of the Tidewater market kind of tells the story - as hard as Walmart, with its multitude of SuperCenters, tries to overtake Food Lion, “the little engine that could” continues to lead the pack in the fierce \$6.45 billion market.

Harris Teeter – After a tour of most of HT’s stores in both Tidewater and the Charlottesville area over the past few months, I believe that store conditions at the division of Kroger have slipped a bit. Obviously, attracting and retaining labor are major industry issues and perhaps HT’s high customer service image makes any type of drop off more noticeable. Still, for a traditional supermarket, the regional chain continues to offer a better selection of fresh and prepared foods than anybody in the market except Wegmans.

Publix – The nation’s most profitable supermarket chain should be doing more business than it currently is at its 16 Richmond area stores. While inflation helped boost sales, Publix could benefit from a less sterile look (when compared to its local competitors) and a more creative merchandising approach featuring more local products. After six years in the Richmond market, that clearly isn’t going to happen. The company has a pragmatic approach to its stores and who can argue with its success. Over the next 24 months, the Lakeland, FL-based chain plans to open its first three stores in the Tidewater market - in Norfolk, Suffolk and Virginia Beach – which should squeeze that overstored area even more. With a new distribution center near Greensboro, NC now open, Publix has a lot more flexibility to expand, perhaps even into the Northern Virginia suburbs.

Aldi – The German discounter with U.S. headquarters in Batavia, IL continues to open new stores and gain market share. Now with 33 stores in the Richmond-Norfolk area (two more than last year), Aldi has proven to be the best small-box discount retailer in the U.S. with a consistent formula of operating clean stores that are easy to shop and offering excellent private label products at very low prices. It’s a formula that will make Aldi the third largest food retailer in the U.S. by the end of this year.

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IN REVIEW: CVS

State	County	2023 Stores	2023 Sales (in millions)	2023 County Food Sales	% of 2023 County Market	2022 Stores	2022 Sales (in millions)	% of 2022 County Market
DC	Washington	55	\$484.80	\$2,617.30	18.52%	59	\$482.70	19.48%
DC Recap: 55 stores with sales of \$484.8 million. Total retail food sales for DC in the study: \$2.62 billion. CVS share of DC is 18.52%.								
DE	Kent	3	\$17.60	\$560.60	3.14%	3	\$16.90	3.22%
DE	Sussex	6	\$34.10	\$1,078.40	3.16%	6	\$32.80	3.27%
DE Recap: 9 stores with sales of \$51.7 million. Total retail food sales for DE in the study: \$1.64 billion. Retailer share of DE is 3.15%.								
MD	Anne Arundel	22	\$123.80	\$2,491.60	4.97%	22	\$119.50	5.13%
MD	Baltimore City	16	\$95.70	\$1,581.30	6.05%	16	\$92.80	6.07%
MD	Baltimore County	26	\$156.50	\$3,629.50	4.31%	26	\$150.70	4.37%
MD	Calvert	3	\$14.80	\$423.20	3.50%	3	\$14.60	3.66%
MD	Carroll	6	\$31.60	\$720.30	4.39%	6	\$30.60	4.44%
MD	Cecil	1	\$5.20	\$317.20	1.64%	1	\$5.00	1.73%
MD	Charles	8	\$41.80	\$564.80	7.40%	8	\$40.10	7.64%
MD	Frederick	12	\$68.70	\$1,015.20	6.77%	12	\$65.80	6.80%
MD	Harford	8	\$36.80	\$1,113.40	3.31%	8	\$35.20	3.39%
MD	Howard	9	\$45.60	\$1,270.20	3.59%	9	\$43.90	3.65%
MD	Montgomery	43	\$452.50	\$3,963.80	11.42%	43	\$433.70	11.52%
MD	Prince George's	49	\$288.40	\$3,422.70	8.43%	49	\$276.50	8.58%
MD	Queen Anne's	1	\$6.00	\$163.90	3.66%	1	\$5.80	3.65%
MD	St. Mary's	6	\$27.20	\$375.20	7.25%	6	\$26.50	6.77%
MD	Talbot	2	\$8.10	\$243.80	3.32%	2	\$7.70	3.38%
MD	Washington	6	\$20.30	\$575.10	3.53%	7	\$21.50	3.87%
MD	Wicomico	2	\$8.10	\$318.60	2.54%	2	\$7.70	2.57%
MD	Worcester	3	\$19.40	\$241.60	8.03%	3	\$18.90	7.60%
MD Recap: 223 stores with sales of \$1.45 billion. Total retail food sales for MD in the study: \$22.75 billion. CVS share of MD is 6.38%.								
PA	Adams	1	\$5.70	\$219.60	2.60%	1	\$5.20	2.42%
PA	Cumberland	12	\$56.80	\$1,252.70	4.53%	14	\$65.80	5.45%
PA	Dauphin	13	\$65.20	\$1,104.00	5.91%	13	\$61.20	5.74%
PA	Franklin	5	\$23.10	\$480.20	4.81%	5	\$21.40	4.70%
PA	Lancaster	24	\$121.20	\$1,889.90	6.41%	24	\$114.20	6.16%
PA	Lebanon	5	\$23.80	\$487.60	4.88%	4	\$17.00	3.87%
PA	York	12	\$61.50	\$1,731.80	3.55%	12	\$58.10	3.54%
PA Recap: 72 stores with sales of \$357.3 million. Total retail food sales for PA in the study: \$7.31 billion. CVS share of PA is 4.89%.								
VA	Accomack	1	\$4.90	\$101.80	4.81%	1	\$4.70	4.66%
VA	Albemarle	8	\$31.90	\$699.10	4.56%	8	\$30.50	4.50%
VA	Arlington	19	\$117.40	\$1,054.20	11.14%	19	\$111.60	11.59%
VA	Caroline	1	\$4.80	\$43.80	10.96%	1	\$4.40	13.10%
VA	Chesapeake City	6	\$43.80	\$947.50	4.62%	6	\$38.40	4.33%
VA	Chesterfield	22	\$112.80	\$1,688.50	6.68%	22	\$105.80	7.05%
VA	Culpeper	2	\$7.70	\$183.60	4.19%	2	\$7.20	4.15%
VA	Dinwiddie	1	\$6.00	\$143.40	4.18%	1	\$5.80	4.30%
VA	Fairfax	67	\$356.10	\$6,001.60	5.93%	67	\$340.10	6.21%
VA	Fauquier	1	\$4.40	\$190.00	2.32%	2	\$7.80	4.14%
VA	Frederick	8	\$32.20	\$544.60	5.91%	8	\$29.70	5.69%
VA	Greene	1	\$4.90	\$17.70	27.68%	1	\$4.60	26.14%
VA	Hampton/Newport News	8	\$37.90	\$1,331.60	2.85%	8	\$36.10	2.71%
VA	Hanover	6	\$34.10	\$515.60	6.61%	6	\$32.30	6.67%

IN REVIEW: CVS

State	County	2023 Stores	2023 Sales (in millions)	2023 County Food Sales	% of 2023 County Market	2022 Stores	2022 Sales (in millions)	% of 2022 County Market
VA	Henrico	28	\$135.20	\$2,024.70	6.68%	28	\$130.30	6.61%
VA	Isle of Wight	2	\$11.10	\$104.60	10.61%	2	\$10.70	11.69%
VA	James City	6	\$32.40	\$452.50	7.16%	6	\$31.50	7.39%
VA	King George	1	\$5.00	\$103.80	4.82%	1	\$4.90	5.07%
VA	Lancaster/VA	1	\$4.00	\$88.60	4.51%	1	\$3.90	4.63%
VA	Loudoun	12	\$57.50	\$1,629.40	3.53%	12	\$55.40	3.61%
VA	Louisa	1	\$6.30	\$47.60	13.24%	1	\$6.00	12.07%
VA	Norfolk City	7	\$44.50	\$841.80	5.29%	7	\$43.70	5.53%
VA	Orange	2	\$12.80	\$148.20	8.64%	2	\$12.10	9.56%
VA	Page	1	\$5.10	\$71.70	7.11%	1	\$4.90	6.68%
VA	Portsmouth City	3	\$16.60	\$298.30	5.56%	3	\$15.40	5.57%
VA	Powhatan	1	\$4.90	\$80.20	6.11%	1	\$4.70	6.11%
VA	Prince George	1	\$4.80	\$81.90	5.86%	1	\$4.50	5.61%
VA	Prince William	18	\$92.60	\$2,149.40	4.31%	18	\$88.60	4.57%
VA	Shenandoah	1	\$4.30	\$122.80	3.50%	1	\$4.00	3.27%
VA	Spotsylvania	14	\$81.80	\$856.60	9.55%	14	\$77.80	9.46%
VA	Stafford	5	\$24.50	\$441.60	5.55%	5	\$23.80	5.44%
VA	Suffolk City	1	\$5.50	\$332.20	1.66%	1	\$5.10	1.65%
VA	Virginia Beach	13	\$61.70	\$1,801.80	3.42%	13	\$58.70	3.46%
VA	Warren	2	\$8.10	\$170.40	4.75%	2	\$7.80	4.83%
VA	York	1	\$4.80	\$202.80	2.37%	1	\$4.60	2.52%

VA Recap: 272 stores with sales of \$1.42 billion. Total retail food sales for VA in the study: \$26.27 billion. CVS share of VA is 5.42%.

Mid-Atlantic Recap: 631 stores with sales of \$3.77 billion annually. Mid-Atlantic retail food sales total: \$60.6 billion.

CVS Per Store Average: \$5.97 million

Source: *Food World*, June 2023

No Kittens.

No celebrity gossip. No selfies. No recipes.



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VIRGINIA COUNTY SHARE OF MARKET: 2023

Total sales for those Virginia counties included in this study are \$26.3 billion


Rank	Company	Stores	Sales (in millions)	% of Market
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ACCOMACK COUNTY (\$101.8 million)
(Includes Chincoteague)

- Population 33,191
- # of Households 14,152
- Median Income \$50,601
- Under age 18 20.5%
- Over age 65 25.2%
- Female 50.9%
- White 59.7%
- Black 25.6%
- Hispanic 9.5%
- Asian 0.9%


1	Walmart (SuperCenter)	1	\$39.80	39.10%
2	Food Lion	2	\$34.10	33.50%
3	Royal Farm Stores	5	\$12.50	12.28%
4	Fas-Marts	3	\$6.30	6.19%
5	Great Valu	1	\$5.60	5.50%
6	CVS	1	\$4.90	4.81%
		13	\$103.20	101.38%*



ALBEMARLE COUNTY Including CHARLOTTESVILLE (\$699.1 million)
(Includes, Keswick, White Hall)

- Population 159,907
- # of Households 62,378
- Median Income \$77,019
- Under age 18 17.8%
- Over age 65 16.5%
- Female 51.7%
- White 71.4%
- Black 17.8%
- Hispanic 6.0%
- Asian 6.5%


1	Kroger	3	\$148.20	21.20%
2	Harris Teeter	3	\$78.30	11.20%
3	Wegmans	1	\$75.40	10.79%
4	Food Lion	6	\$68.40	9.78%
5	Costco	1	\$43.30	6.19%
6	Walmart (SuperCenter)	1	\$40.50	5.79%
7	Whole Foods	1	\$37.40	5.35%
8	Giant Food	1	\$37.10	5.31%
9	CVS	8	\$31.90	4.56%
10	Sam's Club	1	\$28.20	4.03%
11	Trader Joe's	1	\$22.80	3.26%
12	7-Eleven	8	\$17.50	2.50%
13	Target	1	\$16.30	2.33%
14	Fas-Marts	6	\$14.30	2.05%
15	Walgreens	2	\$10.70	1.53%
16	Great Valu	1	\$9.80	1.40%
17	Aldi	1	\$8.90	1.27%
18	Lidl	1	\$8.60	1.23%
		47	\$697.60	99.79%



ARLINGTON COUNTY (\$1.0 billion)
(Includes Arlington)

- Population 234,000
- # of Households 109,528
- Median Income \$128,145
- Under age 18 18.2%
- Over age 65 11.6%
- Female 49.6%
- White 60.4%
- Black 10.3%
- Hispanic 16.6%
- Asian 11.1%


1	Harris Teeter	6	\$280.70	26.63%
2	CVS	19	\$117.40	11.14%
3	Giant Food	4	\$117.40	11.14%
4	Whole Foods	3	\$91.60	8.69%
5	Costco	1	\$78.30	7.43%
6	Albertsons (Balducci's/Safeway)	4	\$77.60	7.36%
7	7-Eleven	28	\$71.40	6.77%
8	Target	3	\$62.40	5.92%
9	Military Commissaries	1	\$37.02	3.51%
10	Trader Joe's	1	\$36.20	3.43%
11	Walgreens	5	\$35.40	3.36%
12	MOM's Organic Market	1	\$16.10	1.53%
13	International Markets	1	\$13.90	1.32%
14	Lidl	1	\$9.50	0.90%
15	Streets Market	1	\$7.60	0.72%
		79	\$1,052.52	99.84%



CAROLINE COUNTY (\$43.8 million)
(Includes Bowling Green)

- Population 31,957
- # of Households 11,000
- Median Income \$76,528
- Under age 18 22.5%
- Over age 65 17.0%
- Female 50.2%
- White 63.1%
- Black 26.6%
- Hispanic 6.2%
- Asian 1.0%

1	Food Lion	2	\$17.80	40.64%
2	Sheetz	2	\$10.10	23.06%
3	7-Eleven	2	\$5.80	13.24%
4	Walgreens	1	\$5.20	11.87%
5	CVS	1	\$4.80	10.96%
		8	\$43.70	99.77%



CHARLES CITY COUNTY (\$5.2 million)
(Includes Charles City. Multi-store retailers do not operate in this county.)

- Population 6,605
- # of Households 2,932
- Median Income \$59,543
- Under age 18 14.3%
- Over age 65 26.4%
- Female 51.0%
- White 43.8%
- Black 43.5%
- Hispanic 2.4%
- Asian 0.7%

Multi-store retailers do not operate in this county.

See VIRGINIA COUNTY SHARE on page 113

VIRGINIA COUNTY SHARE OF MARKET: 2023

Continued from page 112



CHESAPEAKE CITY (\$947.5 million)

- Population 252,488
- # of Households 89,413
- Median Income \$85,563
- Under age 18 24.3%
- Over age 65 14.0%
- Female 50.8%
- White 55.7%
- Black 30.6%
- Hispanic 7.3%
- Asian 3.8%

1	Walmart (SC/Neighborhood Mkt)	6	\$175.40	18.51%
2	Food Lion	12	\$154.70	16.33%
3	Kroger (Marketplace)	3	\$131.70	13.90%
4	Harris Teeter	3	\$82.30	8.69%
5	Sam's Club	2	\$79.50	8.39%
6	7-Eleven	34	\$75.60	7.98%
7	CVS	6	\$43.80	4.62%
8	Wawa	6	\$41.25	4.35%
9	Target	3	\$32.90	3.47%
10	BJ's Wholesale Club	1	\$31.40	3.31%
11	Walgreens	6	\$28.60	3.02%
12	Rite Aid	8	\$27.30	2.88%
13	Aldi	3	\$19.10	2.02%
14	Miller Marts	8	\$11.40	1.20%
15	Lidl	1	\$8.70	0.92%
16	Royal Farm Stores	1	\$3.10	0.33%
		103	\$946.75	99.92%



CHESTERFIELD COUNTY Includes COLONIAL HEIGHTS (\$1.7 billion) (Including Chester, Midlothian)

- Population 396,702
- # of Households 138,815
- Median Income \$76,943
- Under age 18 23.8%
- Over age 65 17.3%
- Female 52.5%
- White 63.6%
- Black 22.0%
- Hispanic 9.0%
- Asian 3.7%

1	Kroger (Marketplace)	7	\$274.50	16.26%
2	Walmart (SC/Neighborhood Mkt)	6	\$247.80	14.68%
3	Food Lion	17	\$222.70	13.19%
4	Wawa	13	\$130.81	7.75%
5	7-Eleven	33	\$115.70	6.85%
6	CVS	22	\$112.80	6.68%
7	Publix	5	\$84.30	4.99%
8	Target	5	\$70.70	4.19%
9	Wegmans	1	\$66.80	3.96%
10	Walgreens	9	\$59.90	3.55%
11	Sam's Club	2	\$56.50	3.35%
12	Costco	1	\$49.30	2.92%

13	BJ's Wholesale Club	1	\$48.20	2.85%
14	Aldi	6	\$43.10	2.55%
15	Trader Joe's	1	\$22.10	1.31%
16	International Markets	3	\$21.70	1.29%
17	Sheetz	5	\$16.80	0.99%
18	Fresh Market	2	\$15.90	0.94%
19	Lidl	2	\$14.90	0.88%
20	Rite Aid	4	\$13.80	0.82%
21	Royal Farm Stores	1	\$4.10	0.24%
22	Circle K	1	\$2.30	0.14%
23	Dash-In	1	\$2.10	0.12%
		148	\$1,696.81	100.49%*



CLARKE COUNTY (\$16.0 million) (Includes Berryville, Boyce)

- Population 15,266
- # of Households 5,692
- Median Income \$86,633
- Under age 18 19.6%
- Over age 65 22.1%
- Female 50.2%
- White 84.7%
- Black 4.4%
- Hispanic 7.0%
- Asian 1.5%

1	7-Eleven	3	\$7.50	46.88%
2	Sheetz	1	\$4.30	26.88%
3	Circle K	1	\$2.10	13.13%
		5	\$13.90	86.88%



CULPEPER COUNTY (\$183.6 million) (Includes Culpeper, Rapidan)

- Population 54,381
- # of Households 17,692
- Median Income \$85,274
- Under age 18 25.0%
- Over age 65 16.3%
- Female 49.9%
- White 68.6%
- Black 14.1%
- Hispanic 13.0%
- Asian 1.9%

1	The Giant Co. (Martin's)	1	\$48.20	26.25%
2	Walmart (SuperCenter)	1	\$34.70	18.90%
3	Albertsons (Safeway)	1	\$16.10	8.77%
4	Target	1	\$15.90	8.66%
5	7-Eleven	6	\$14.10	7.68%
6	Weis Markets	1	\$13.93	7.59%
7	Walgreens	2	\$13.20	7.19%
8	Aldi	1	\$9.90	5.39%
9	Lidl	1	\$8.00	4.36%
10	CVS	2	\$7.70	4.19%
		17	\$181.73	98.98%

See VIRGINIA COUNTY SHARE on page 114

VIRGINIA COUNTY SHARE OF MARKET: 2023

Continued from page 113



CUMBERLAND COUNTY (\$9.5 million) (Includes Cumberland)

- Population 9,746
- # of Households 3,990
- Median Income \$57,568
- Under age 18 19.4%
- Over age 65 23.1%
- Female 51.7%
- White 63.5%
- Black 30.2%
- Hispanic 3.4%
- Asian 0.5%

Multi-store retailers do not operate in this county.



DINWIDDIE COUNTY Including PETERSBURG (\$143.4 million) (Includes Dinwiddie, Church Road)

- Population 61,555
- # of Households 24,732
- Median Income \$56,904
- Under age 18 21.5%
- Over age 65 17.6%
- Female 52.4%
- White 38.6%
- Black 54.3%
- Hispanic 4.7%
- Asian 1.0%

1	Walmart (SuperCenter)	1	\$46.20	32.22%
2	Food Lion	4	\$40.80	28.45%
3	Walgreens	2	\$11.80	8.23%
4	Wawa	1	\$7.18	5.01%
5	7-Eleven	2	\$6.00	4.18%
6	CVS	1	\$6.00	4.18%
7	International Markets	1	\$6.00	4.18%
8	Save A Lot	1	\$5.80	4.04%
9	Rite Aid	1	\$4.80	3.35%
10	Sheetz	1	\$4.60	3.21%
11	Fas-Marts	1	\$2.30	1.60%
		16	\$141.48	98.66%



ESSEX COUNTY (\$70.4 million) (Includes Tappahannock)

- Population 10,630
- # of Households 4,299
- Median Income \$54,375
- Under age 18 18.0%
- Over age 65 24.1%
- Female 52.7%
- White 54.3%
- Black 37.0%
- Hispanic 4.4%
- Asian 1.2%

1	Walmart (SuperCenter)	1	\$44.90	63.78%
2	Food Lion	1	\$12.60	17.90%
3	Walgreens	1	\$5.60	7.95%
4	Sheetz	1	\$4.00	5.68%
5	Fas-Marts	1	\$2.50	3.55%
		5	\$69.60	98.86%



FAIRFAX CO. Including FALLS CHURCH, FAIRFAX, ALEXANDRIA (\$6.0 billion) (Includes McLean, Reston, Springfield)

- Population 1,333,277
- # of Households 497,617
- Median Income \$128,247
- Under age 18 22.4%
- Over age 65 14.1%
- Female 50.6%
- White 56.2%
- Black 11.2%
- Hispanic 15.6%
- Asian 14.1%

1	Giant Food	29	\$1,051.60	17.52%
2	Albertsons (Balducci's/Safeway)	27	\$663.90	11.06%
3	Wegmans	6	\$621.50	10.36%
4	International Markets	33	\$461.80	7.69%
5	Costco	4	\$414.50	6.91%
6	Harris Teeter	10	\$402.40	6.70%
7	CVS	67	\$356.10	5.93%
8	Whole Foods (Amazon Fresh)	10	\$331.10	5.52%
9	Target	11	\$264.80	4.41%
10	Walmart (SuperCenter)	8	\$259.30	4.32%
11	7-Eleven	138	\$247.60	4.13%
12	Trader Joe's	7	\$204.50	3.41%
13	BJ's Wholesale Club	3	\$138.80	2.31%
14	Aldi	13	\$129.40	2.16%
15	Walgreens	21	\$129.40	2.16%
16	Military Commissaries	1	\$72.06	1.20%
17	Lidl	6	\$58.30	0.97%
18	MOM's Organic Market	3	\$53.60	0.89%
19	Shoppers	1	\$32.60	0.54%
20	Food Lion	2	\$31.80	0.53%
21	The Fresh Market	2	\$25.60	0.43%
22	Sprouts	1	\$20.30	0.34%
23	Wawa	3	\$13.29	0.22%
24	Circle K	2	\$5.80	0.10%
25	ASG	1	\$4.59	0.08%
26	Sheetz	1	\$4.50	0.07%
27	C&S Independents	3	\$2.61	0.04%
28	Dash-In	1	\$2.50	0.04%
		414	\$6,004.25	100.04%*



FAUQUIER COUNTY (\$190.0 million) (Includes Remington, Warrenton)

- Population 74,664
- # of Households 25,472
- Median Income \$111,368
- Under age 18 23.1%
- Over age 65 17.1%
- Female 50.1%
- White 77.7%
- Black 7.8%
- Hispanic 10.4%
- Asian 1.8%

1	Walmart (SuperCenter)	1	\$39.60	20.84%
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See VIRGINIA COUNTY SHARE on page 115

VIRGINIA COUNTY SHARE OF MARKET: 2023

Continued from page 114

2	Giant Food	1	\$32.90	17.32%
3	Food Lion	3	\$25.10	13.21%
4	Albertsons (Safeway)	1	\$21.50	11.32%
5	Harris Teeter	1	\$20.10	10.58%
6	Sheetz	3	\$12.90	6.79%
7	Walgreens	2	\$11.40	6.00%
8	7-Eleven	3	\$8.00	4.21%
9	Wawa	2	\$6.75	3.55%
10	CVS	1	\$4.40	2.32%
11	Royal Farm Stores	1	\$4.10	2.16%
12	Circle K	1	\$2.30	1.21%
		20	\$189.05	99.50%

5	Aldi	1	\$11.40	8.36%
6	Rite Aid	2	\$8.40	6.16%
7	Wawa	1	\$8.35	6.13%
8	Walgreens	1	\$5.80	4.26%
		17	\$135.25	99.23%



GOOCHLAND COUNTY (\$47.3 million) (Includes Goochland, Manakin)

- Population 26,109
- # of Households 9,454
- Median Income \$100,517
- Under age 18 16.8%
- Over age 65 23.4%
- Female 50.6%
- White 78.0%
- Black 14.9%
- Hispanic 3.5%
- Asian 1.9%

1	Food Lion	3	\$36.90	78.01%
2	Wawa	1	\$9.16	19.37%
		4	\$46.06	97.38%



GREENE COUNTY (\$17.6 million) (Includes Stanardsville)

- Population 21,107
- # of Households 7,533
- Median Income \$73,844
- Under age 18 23.7%
- Over age 65 18.3%
- Female 50.5%
- White 80.3%
- Black 7.9%
- Hispanic 7.0%
- Asian 2.4%

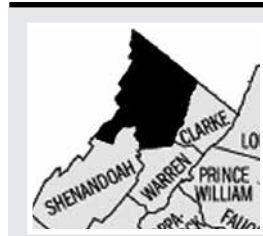
1	Food Lion	1	\$10.60	59.89%
2	CVS	1	\$4.90	27.68%
		2	\$15.50	87.57%



HAMPTON/NEWPORT NEWS CITY (\$1.3 billion)

- Population 322,343
- # of Households 132,038
- Median Income \$58,421
- Under age 18 22.3%
- Over age 65 14.9%
- Female 51.7%
- White 38.6%
- Black 47.6%
- Hispanic 8.3%
- Asian 3.0%

1	Food Lion	16	\$298.70	22.43%
2	Walmart (SC/Neighborhood Mkt)	5	\$167.50	12.58%
3	7-Eleven	60	\$138.50	10.40%
4	Military Commissaries	2	\$63.78	4.79%
5	Wawa	7	\$53.60	4.03%
6	Walgreens	8	\$50.20	3.77%
7	Harris Teeter	2	\$43.20	3.24%
8	Costco	1	\$42.60	3.20%
9	BJ's Wholesale Club	1	\$40.60	3.05%
10	Sam's Club	1	\$39.70	2.98%
11	CVS	8	\$37.90	2.85%
12	Kroger	1	\$33.20	2.49%
13	Whole Foods	1	\$32.80	2.46%



FREDERICK COUNTY (\$544.6 million) (Includes Stephens City)

- Population 122,987
- # of Households 43,471
- Median Income \$34,876
- Under age 18 22.5%
- Over age 65 17.4%
- Female 50.3%
- White 72.7%
- Black 8.2%
- Hispanic 14.7%
- Asian 2.4%

1	The Giant Co. (Martin's)	3	\$167.90	30.83%
2	Walmart (SuperCenter)	3	\$161.20	29.60%
3	Costco	1	\$61.30	11.26%
4	CVS	8	\$32.20	5.91%
5	Target	2	\$29.10	5.34%
6	Sheetz	6	\$26.30	4.83%
7	Walgreens	3	\$17.40	3.20%
8	Sharp Shopper	1	\$16.90	3.10%
9	7-Eleven	9	\$15.10	2.77%
10	Aldi	1	\$9.10	1.67%
11	Royal Farm Stores	1	\$4.00	0.73%
12	Circle K	1	\$1.90	0.35%
		39	\$542.40	99.60%



GLOUCESTER COUNTY (\$136.3 million) (Includes Gloucester)

- Population 39,493
- # of Households 14,882
- Median Income \$77,733
- Under age 18 20.0%
- Over age 65 20.4%
- Female 50.6%
- White 84.5%
- Black 7.9%
- Hispanic 4.1%
- Asian 0.9%

1	Walmart (SuperCenter)	1	\$39.10	28.69%
2	Food Lion	2	\$24.20	17.75%
3	Kroger	1	\$22.50	16.51%
4	7-Eleven	8	\$15.50	11.37%

See VIRGINIA COUNTY SHARE on page 116

VIRGINIA COUNTY SHARE OF MARKET: 2023

Continued from page 115

14	Rite Aid	8	\$31.80	2.39%
15	Target	2	\$29.60	2.22%
16	Aldi	3	\$26.10	1.96%
17	Lidl	2	\$18.10	1.36%
18	Trader Joe's	1	\$16.90	1.27%
19	The Fresh Market	1	\$12.90	0.97%
20	International Markets	1	\$12.70	0.95%
21	Miller Marts	4	\$8.80	0.66%
22	Save A Lot	1	\$6.40	0.48%
23	Circle K	1	\$2.10	0.16%
		137	\$1,207.68	90.69%

2	Kroger (Marketplace)	9	\$301.20	14.88%
3	Food Lion	14	\$205.10	10.13%
4	Publix	10	\$159.20	7.86%
5	CVS	28	\$135.20	6.68%
6	7-Eleven	56	\$120.40	5.95%
7	Wawa	12	\$112.13	5.54%
8	Walgreens	17	\$108.70	5.37%
9	Target	6	\$106.50	5.26%
10	Wegmans	1	\$68.70	3.39%
11	Costco	1	\$51.30	2.53%
12	Whole Foods	2	\$47.10	2.33%
13	BJ's Wholesale Club	1	\$46.60	2.30%
14	Aldi	6	\$45.10	2.23%
15	Sam's Club	1	\$44.30	2.19%
16	International Markets	2	\$31.20	1.54%
17	Lidl	4	\$27.80	1.37%
18	Fresh Market	2	\$25.60	1.26%
19	Fas-Marts	16	\$23.50	1.16%
20	Trader Joe's	1	\$20.00	0.99%
21	Sheetz	3	\$10.90	0.54%
22	Rite Aid	2	\$9.90	0.49%
23	Save A Lot	2	\$8.30	0.41%
24	Great Valu	1	\$5.00	0.25%
25	Dash-In	2	\$4.90	0.24%
26	Miller Marts	1	\$2.50	0.12%
		207	\$2,022.53	99.89%



HANOVER COUNTY (\$515.6 million) (Includes Ashland, Mechanicsville)

• Population	112,938	• Female	50.6%
• # of Households	40,310	• White	82.8%
• Median Income	\$96,911	• Black	9.6%
• Under age 18	21.6%	• Hispanic	3.5%
• Over age 65	18.7%	• Asian	2.1%

1	Walmart (SC/Neighborhood Mkt)	3	\$113.60	22.03%
2	Kroger (Marketplace)	2	\$104.20	20.21%
3	Food Lion	6	\$75.20	14.58%
4	BJ's Wholesale Club	1	\$36.80	7.14%
5	Wawa	4	\$36.32	7.04%
6	CVS	6	\$34.10	6.61%
7	7-Eleven	9	\$26.20	5.08%
8	Target	1	\$18.10	3.51%
9	Publix	1	\$17.50	3.39%
10	Walgreens	3	\$16.80	3.26%
11	Fas-Marts	8	\$11.20	2.17%
12	Sheetz	3	\$10.60	2.06%
13	Aldi	1	\$9.20	1.78%
14	Dash-In	1	\$2.20	0.43%
15	Circle K	1	\$1.90	0.37%
		50	\$513.92	99.67%



ISLE OF WIGHT COUNTY (\$104.6 million) (Includes Smithfield)

• Population	40,151	• Female	50.8%
• # of Households	15,063	• White	69.5%
• Median Income	\$84,673	• Black	23.0%
• Under age 18	21.3%	• Hispanic	4.2%
• Over age 65	19.8%	• Asian	1.1%

1	Food Lion	3	\$36.70	35.09%
2	Kroger	1	\$29.10	27.82%
3	7-Eleven	4	\$12.10	11.57%
4	CVS	2	\$11.10	10.61%
5	Rite Aid	2	\$8.30	7.93%
6	Royal Farm Stores	1	\$3.00	2.87%
7	Miller Marts	1	\$2.30	2.20%
		14	\$102.60	98.09%



HENRICO COUNTY Including RICHMOND CITY (\$2.0 billion) (Includes Highland Springs, Sandston)

• Population	563,357	• Female	52.4%
• # of Households	231,286	• White	47.0%
• Median Income	\$65,570	• Black	38.2%
• Under age 18	19.7%	• Hispanic	7.0%
• Over age 65	15.3%	• Asian	6.1%

1	Walmart (SuperCenter)	7	\$301.40	14.89%
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See VIRGINIA COUNTY SHARE on page 117

VIRGINIA COUNTY SHARE OF MARKET: 2023

Continued from page 116



JAMES CITY CO. Including WILLIAMSBURG (\$452.5 million) (Includes Norge, Toano)

- Population 97,108
- # of Households 34,526
- Median Income \$80,102
- Under age 18 15.5%
- Over age 65 22.0%
- Female 52.6%
- White 71.1%
- Black 15.0%
- Hispanic 7.1%
- Asian 4.3%

1	Harris Teeter	3	\$109.70	24.24%
2	Walmart (SC/Neighborhood Mkt)	2	\$79.60	17.59%
3	Food Lion	5	\$63.10	13.94%
4	CVS	6	\$32.40	7.16%
5	7-Eleven	13	\$28.40	6.28%
6	Target	2	\$27.10	5.99%
7	Wawa	3	\$20.61	4.55%
8	Trader Joe's	1	\$19.10	4.22%
9	Fresh Market	1	\$13.90	3.07%
10	Publix	1	\$13.90	3.07%
11	Rite Aid	2	\$10.20	2.25%
12	Aldi	1	\$8.80	1.94%
13	Walgreens	1	\$7.20	1.59%
14	Fas-Marts	2	\$4.90	1.08%
15	Miller Marts	2	\$2.10	0.46%
		45	\$441.01	97.46%



KING & QUEEN COUNTY (\$6.0 million) (Includes King & Queen Courthouse)

- Population 6,718
- # of Households 2,803
- Median Income \$61,672
- Under age 18 17.7%
- Over age 65 23.4%
- Female 48.8%
- White 66.5%
- Black 24.5%
- Hispanic 3.8%
- Asian 0.6%

Multi-store retailers do not operate in this county.



KING GEORGE COUNTY (\$103.8 million) (Includes King George)

- Population 27,856
- # of Households 9,445
- Median Income \$101,599
- Under age 18 24.6%
- Over age 65 14.0%
- Female 49.3%
- White 72.3%
- Black 16.1%
- Hispanic 6.6%
- Asian 1.7%

1	Walmart (SuperCenter)	1	\$38.90	37.48%
2	Food Lion	2	\$27.90	26.88%
3	Sheetz	3	\$13.20	12.72%
4	Wawa	1	\$7.58	7.30%
5	CVS	1	\$5.00	4.82%
6	7-Eleven	2	\$3.80	3.66%

7	Fas-Marts	2	\$3.70	3.56%
8	Military Commissaries	1	\$2.38	2.29%
		13	\$102.46	98.71%



KING WILLIAM COUNTY (\$39.7 million) (Includes West Point)

- Population 18,492
- # of Households 6,667
- Median Income \$74,592
- Under age 18 22.8%
- Over age 65 16.7%
- Female 50.8%
- White 77.1%
- Black 15.1%
- Hispanic 3.1%
- Asian 1.4%

1	Food Lion	2	\$31.60	79.60%
2	7-Eleven	2	\$4.60	11.59%
3	Fas-Marts	1	\$2.50	6.30%
		5	\$38.70	97.48%



LANCASTER COUNTY (\$88.6 million) (Includes Kilmarnock)

- Population 10,750
- # of Households 5,197
- Median Income \$64,460
- Under age 18 15.7%
- Over age 65 36.7%
- Female 52.0%
- White 67.3%
- Black 28.2%
- Hispanic 2.6%
- Asian 0.9%

1	Walmart (SuperCenter)	1	\$40.10	45.26%
2	Great Valu	1	\$15.90	17.95%
3	Food Lion	1	\$15.60	17.61%
4	Walgreens	1	\$6.10	6.88%
5	CVS	1	\$4.00	4.51%
6	Fas-Marts	1	\$2.40	2.71%
		6	\$84.10	94.92%



LOUDOUN COUNTY (\$1.6 billion) (Includes Ashburn, Leesburg, Sterling)

- Population 432,085
- # of Households 135,960
- Median Income \$156,821
- Under age 18 27.1%
- Over age 65 10.2%
- Female 49.9%
- White 53.1%
- Black 8.2%
- Hispanic 13.9%
- Asian 21.8%

1	Giant Food	9	\$262.50	16.11%
2	Harris Teeter	9	\$253.50	15.56%
3	Wegmans	2	\$195.70	12.01%
4	Costco	2	\$175.80	10.79%
5	Walmart (SuperCenter)	3	\$130.30	8.00%
6	International Markets	4	\$73.40	4.50%
7	Target (Super Target)	3	\$65.20	4.00%
8	Albertsons (Safeway)	4	\$57.70	3.54%
9	CVS	12	\$57.50	3.53%
10	Walgreens	10	\$56.30	3.46%

See VIRGINIA COUNTY SHARE on page 118

VIRGINIA COUNTY SHARE OF MARKET: 2023

Continued from page 117

11	Aldi	4	\$42.70	2.62%
12	7-Eleven	24	\$42.50	2.61%
13	Food Lion	3	\$41.70	2.56%
14	Sam's Club	1	\$40.90	2.51%
15	Whole Foods	1	\$34.20	2.10%
16	Sheetz	7	\$32.50	1.99%
17	Lidl	3	\$23.60	1.45%
18	Trader Joe's	1	\$20.80	1.28%
19	Wawa	2	\$12.00	0.74%
20	Royal Farm Stores	2	\$4.90	0.30%
21	Circle K	2	\$4.20	0.26%
		108	\$1,627.90	99.91%



LOUISA COUNTY (\$47.6 million) (Includes Louisa, Mineral)

- Population 40,116
- # of Households 14,192
- Median Income \$70,974
- Under age 18 19.8%
- Over age 65 20.6%
- Female 50.2%
- White 78.0%
- Black 14.9%
- Hispanic 3.6%
- Asian 0.7%

1	Food Lion	2	\$22.90	48.11%
2	Sheetz	2	\$9.70	20.38%
3	CVS	1	\$6.30	13.24%
4	Walgreens	1	\$5.70	11.97%
		6	\$44.60	93.70%



MADISON COUNTY (\$15.0 million) (Includes Madison)

- Population 14,000
- # of Households 5,175
- Median Income \$72,349
- Under age 18 20.0%
- Over age 65 23.1%
- Female 51.5%
- White 84.6%
- Black 8.7%
- Hispanic 3.5%
- Asian 0.8%

1	Food Lion	1	\$14.80	98.67%
		1	\$14.80	98.67%



MATHEWS COUNTY (\$15.3 million) (Includes Mathews)

- Population 8,490
- # of Households 3,558
- Median Income \$73,229
- Under age 18 15.6%
- Over age 65 31.6%
- Female 50.9%
- White 84.8%
- Black 8.4%
- Hispanic 3.3%
- Asian 0.9%

1	Food Lion	1	\$14.90	97.39%
		1	\$14.90	97.39%



MIDDLESEX COUNTY (\$34.8 million) (Includes Urbanna)

- Population 10,943
- # of Households 4,579
- Median Income \$63,782
- Under age 18 15.7%
- Over age 65 32.6%
- Female 50.2%
- White 78.1%
- Black 15.7%
- Hispanic 3.2%
- Asian 0.6%

1	Food Lion	1	\$15.10	43.39%
2	7-Eleven	4	\$11.50	33.05%
3	Great Valu	1	\$6.80	19.54%
		6	\$33.40	95.98%



NEW KENT COUNTY (\$62.8 million) (Includes New Kent, Providence, Forge)

- Population 24,986
- # of Households 8,306
- Median Income \$101,628
- Under age 18 19.5%
- Over age 65 18.0%
- Female 48.5%
- White 77.4%
- Black 13.9%
- Hispanic 4.0%
- Asian 1.2%

1	Food Lion	4	\$52.60	83.76%
2	Walgreens	1	\$5.90	9.39%
3	Fas-Marts	2	\$5.60	8.92%
		7	\$64.10	102.07%*



NORFOLK CITY (\$841.8 million)

- Population 232,995
- # of Households 92,877
- Median Income \$56,244
- Under age 18 19.4%
- Over age 65 12.0%
- Female 47.7%
- White 43.2%
- Black 41.5%
- Hispanic 9.1%
- Asian 3.9%

1	Walmart (SC/Neighborhood Mkt)	4	\$171.40	20.36%
2	Food Lion	8	\$140.70	16.71%
3	7-Eleven	44	\$107.10	12.72%
4	Harris Teeter	3	\$73.20	8.70%
5	Costco	1	\$51.30	6.09%
6	CVS	7	\$44.50	5.29%
7	Wawa	6	\$43.19	5.13%
8	Walgreens	5	\$33.70	4.00%
9	BJ's Wholesale Club	1	\$31.20	3.71%
10	Military Commissaries	1	\$29.74	3.53%
11	Aldi	3	\$25.20	2.99%
12	The Fresh Market	1	\$17.60	2.09%
13	Miller Marts	8	\$17.50	2.08%
14	Rite Aid	5	\$17.10	2.03%
15	Target	1	\$15.10	1.79%
16	Lidl	1	\$8.90	1.06%

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VIRGINIA COUNTY SHARE OF MARKET: 2023

Continued from page 118

17	Save A Lot	1	\$5.20	0.62%
18	Royal Farm Stores	1	\$3.50	0.42%
		101	\$836.13	99.33%



NORTHAMPTON COUNTY (\$41.9 million) (Includes Cape Charles, Exmore)

• Population	11,900	• Female	52.4%
• # of Households	5,292	• White	56.1%
• Median Income	\$50,347	• Black	32.3%
• Under age 18	18.9%	• Hispanic	9.2%
• Over age 65	28.8%	• Asian	1.0%

1	Food Lion	2	\$22.80	54.42%
2	Fas-Marts	3	\$7.40	17.66%
3	Royal Farm Stores	2	\$6.10	14.56%
4	Walgreens	1	\$5.10	12.17%
		8	\$41.40	98.81%



NORTHUMBERLAND COUNTY (\$22.4 million) (Includes Heathsville)

• Population	12,302	• Female	50.7%
• # of Households	5,127	• White	68.8%
• Median Income	\$61,291	• Black	24.8%
• Under age 18	14.6%	• Hispanic	4.3%
• Over age 65	36.5%	• Asian	0.6%

1	Food Lion	1	\$14.60	65.18%
2	Walgreens	1	\$5.20	23.21%
3	Fas-Marts	1	\$2.20	9.82%
		3	\$22.00	98.21%



NOTTOWAY COUNTY \$41.1 million (Includes Crewe, Nottoway)

• Population	15,559	• Female	44.9%
• # of Households	5,309	• White	54.5%
• Median Income	\$54,614	• Black	38.8%
• Under age 18	19.0%	• Hispanic	4.8%
• Over age 65	19.0%	• Asian	0.6%

1	Walmart (SuperCenter)	1	\$36.50	88.81%
2	Fas-Marts	1	\$2.70	6.57%
		2	\$39.20	95.38%



ORANGE COUNTY (\$148.2 million) (Includes Gordonsville, Orange)

• Population	37,991	• Female	51.0%
• # of Households	13,970	• White	76.5%
• Median Income	\$79,211	• Black	13.2%
• Under age 18	20.9%	• Hispanic	6.3%
• Over age 65	20.3%	• Asian	1.2%

1	Walmart (SuperCenter)	2	\$70.50	47.57%
2	Food Lion	3	\$30.90	20.85%
3	Target	1	\$16.80	11.34%
4	CVS	2	\$12.80	8.64%
5	Sheetz	2	\$9.10	6.14%
6	7-Eleven	4	\$8.90	6.01%
7	Fas-Marts	2	\$4.50	3.04%
		16	\$153.50	103.58%*



PAGE COUNTY (\$71.7 million) (Includes Elgin, Luray)

• Population	23,750	• Female	50.3%
• # of Households	9,355	• White	93.3%
• Median Income	\$53,168	• Black	2.3%
• Under age 18	20.1%	• Hispanic	2.5%
• Over age 65	21.8%	• Asian	0.5%

1	Walmart (SuperCenter)	1	\$42.90	59.83%
2	Food Lion	2	\$12.10	16.88%
3	7-Eleven	2	\$6.30	8.79%
4	CVS	1	\$5.10	7.11%
5	Circle K	1	\$2.30	3.21%
		7	\$68.70	95.82%



PORTSMOUTH CITY (\$298.3 million)

• Population	97,029	• Female	51.9%
• # of Households	38,553	• White	36.2%
• Median Income	\$54,020	• Black	55.0%
• Under age 18	23.3%	• Hispanic	5.2%
• Over age 65	15.2%	• Asian	1.5%

1	Food Lion	5	\$77.60	26.01%
2	Kroger (Marketplace)	1	\$43.50	14.58%
3	Walmart (SuperCenter)	1	\$33.10	11.10%
4	Harris Teeter	1	\$25.80	8.65%
5	7-Eleven	13	\$24.90	8.35%
6	Wawa	3	\$18.42	6.17%
7	CVS	3	\$16.60	5.56%
8	Military Commissaries	1	\$15.47	5.19%
9	Walgreens	2	\$12.80	4.29%
10	Rite Aid	2	\$9.70	3.25%

See VIRGINIA COUNTY SHARE on page 120

VIRGINIA COUNTY SHARE OF MARKET: 2023

Continued from page 119

11	Aldi	1	\$9.20	3.08%
12	Royal Farm Stores	2	\$8.20	2.75%
		35	\$295.29	98.99%



POWHATAN COUNTY (\$80.2 million) (Includes Powhatan)

• Population	31,489	• Female	47.9%
• # of Households	10,722	• White	86.0%
• Median Income	\$101,395	• Black	8.9%
• Under age 18	18.3%	• Hispanic	2.6%
• Over age 65	19.3%	• Asian	0.7%

1	Walmart (SuperCenter)	1	\$40.90	51.00%
2	Food Lion	2	\$24.80	30.92%
3	Sheetz	2	\$8.20	10.22%
4	CVS	1	\$4.90	6.11%
		6	\$78.80	98.25%



PRINCE GEORGE CO. Including HOPEWELL (\$81.9 million) (Includes Prince George)

• Population	66,096	• Female	49.6%
• # of Households	21,761	• White	48.3%
• Median Income	\$61,552	• Black	39.0%
• Under age 18	24.2%	• Hispanic	9.1%
• Over age 65	15.2%	• Asian	1.8%

1	Military Commissaries	1	\$28.17	34.40%
2	Food Lion	2	\$22.70	27.72%
3	7-Eleven	2	\$5.40	6.59%
4	Walgreens	1	\$5.10	6.23%
5	CVS	1	\$4.80	5.86%
6	Rite Aid	2	\$4.80	5.86%
7	Save A Lot	1	\$4.20	5.13%
8	Sheetz	1	\$3.70	4.52%
		11	\$78.87	96.30%



PRINCE WILLIAM CO. Including MANASSAS, MANASSAS PK. (\$2.1 billion) (Includes Dale City, Quantico, Woodbridge)

• Population	546,288	• Female	49.1%
• # of Households	169,205	• White	35.4%
• Median Income	\$102,103	• Black	17.8%
• Under age 18	25.4%	• Hispanic	35.9%
• Over age 65	10.2%	• Asian	9.7%

1	International Markets	12	\$272.50	12.68%
2	Giant Food	8	\$229.60	10.68%
3	Wegmans	2	\$226.30	10.53%
4	7-Eleven	66	\$181.50	8.44%

5	Food Lion	9	\$140.90	6.56%
6	Harris Teeter	4	\$139.80	6.50%
7	Walmart (SuperCenter)	5	\$133.10	6.19%
8	CVS	18	\$92.60	4.31%
9	Costco	2	\$90.60	4.22%
10	Albertsons (Safeway)	4	\$86.20	4.01%
11	Target (Super Target)	4	\$66.90	3.11%
12	Aldi	6	\$66.80	3.11%
13	BJ's Wholesale Club	2	\$66.30	3.08%
14	Lidl	5	\$63.50	2.95%
15	Walgreens	9	\$60.50	2.81%
16	Wawa	7	\$52.31	2.43%
17	Sheetz	10	\$43.60	2.03%
18	Military Commissaries	1	\$43.56	2.03%
19	Sam's Club	1	\$33.50	1.56%
20	Shoppers	1	\$30.90	1.44%
21	MOM's Organic Market	1	\$13.90	0.65%
22	Whole Foods	1	\$8.20	0.38%
23	Circle K	1	\$2.40	0.11%
24	C&S Independents	1	\$1.02	0.05%
		180	\$2,146.49	99.86%



RAPPAHANNOCK COUNTY (\$5.3 million) (Includes Washington)

• Population	7,502	• Female	50.0%
• # of Households	2,773	• White	88.3%
• Median Income	\$90,307	• Black	4.0%
• Under age 18	16.5%	• Hispanic	4.1%
• Over age 65	28.1%	• Asian	1.2%

Multi-store retailers do not operate in this county.



RICHMOND COUNTY (\$24.1 million) (Includes Elevation, Warsaw)

• Population	9,080	• Female	42.9%
• # of Households	2,811	• White	59.8%
• Median Income	\$57,697	• Black	30.0%
• Under age 18	16.9%	• Hispanic	7.5%
• Over age 65	21.0%	• Asian	0.7%

1	Food Lion	1	\$14.70	61.00%
2	Walgreens	1	\$4.80	19.92%
3	7-Eleven	1	\$2.50	10.37%
		3	\$22.00	91.29%

See VIRGINIA COUNTY SHARE on page 121

VIRGINIA COUNTY SHARE OF MARKET: 2023

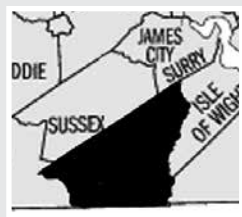
Continued from page 120



SHENANDOAH COUNTY (\$122.8 million) (Includes Strasburg, Woodstock)

• Population	44,968	• Female	50.5%
• # of Households	17,487	• White	86.2%
• Median Income	\$58,609	• Black	3.0%
• Under age 18	21.1%	• Hispanic	8.1%
• Over age 65	22.0%	• Asian	1.2%

1	Food Lion	3	\$44.90	36.56%
2	Walmart (SuperCenter)	1	\$39.10	31.84%
3	7-Eleven	5	\$10.20	8.31%
4	Sheetz	2	\$9.60	7.82%
5	Walgreens	2	\$9.40	7.65%
6	CVS	1	\$4.30	3.50%
7	Circle K	1	\$2.70	2.20%
		15	\$120.20	97.88%



SOUTHAMPTON COUNTY (\$97.5 million) (Includes Courtland)

• Population	26,149	• Female	50.3%
• # of Households	10,135	• White	49.3%
• Median Income	\$57,251	• Black	43.7%
• Under age 18	22.1%	• Hispanic	2.7%
• Over age 65	20.6%	• Asian	1.7%

1	Walmart (SuperCenter)	1	\$45.80	46.97%
2	Food Lion	2	\$31.50	32.31%
3	7-Eleven	3	\$6.90	7.08%
4	Walgreens	1	\$5.50	5.64%
5	Rite Aid	1	\$3.40	3.49%
6	Circle K	1	\$2.50	2.56%
		9	\$95.60	98.05%



SPOTSYLVANIA COUNTY Including FREDERICKSBURG (\$856.6 million) (Includes Spotsylvania)

• Population	175,445	• Female	51.9%
• # of Households	59,142	• White	60.7%
• Median Income	\$85,633	• Black	21.5%
• Under age 18	22.6%	• Hispanic	11.7%
• Over age 65	13.3%	• Asian	3.2%

1	Walmart (SuperCenter)	4	\$173.40	20.24%
2	Giant Food	2	\$96.70	11.29%
3	CVS	14	\$81.80	9.55%
4	Wegmans	1	\$76.50	8.93%
5	Wawa	9	\$66.10	7.72%
6	Weis Markets	5	\$59.78	6.98%
7	7-Eleven	19	\$41.80	4.88%

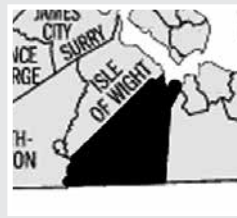
8	Costco	1	\$36.20	4.23%
9	Target (Super Target)	2	\$35.80	4.18%
10	BJ's Wholesale Club	1	\$33.40	3.90%
11	Walgreens	4	\$26.80	3.13%
12	Lidl	2	\$23.10	2.70%
13	Aldi	3	\$18.10	2.11%
14	Sheetz	5	\$17.30	2.02%
15	Royal Farm Stores	5	\$17.20	2.01%
16	Fas-Marts	11	\$15.60	1.82%
17	Publix	1	\$15.20	1.77%
18	Food Lion	1	\$12.80	1.49%
19	Miller Marts	1	\$1.80	0.21%
		91	\$849.38	99.16%



STAFFORD COUNTY (\$437.9 million) (Includes Aquia, Falmouth, Stafford)

• Population	163,380	• Female	49.1%
• # of Households	49,469	• White	56.5%
• Median Income	\$119,818	• Black	21.1%
• Under age 18	26.0%	• Hispanic	15.5%
• Over age 65	10.9%	• Asian	4.0%

1	Giant Food	3	\$124.10	28.10%
2	Walmart (SuperCenter)	2	\$71.30	16.15%
3	Wawa	6	\$43.12	9.76%
4	Target	2	\$38.10	8.63%
5	Weis Markets	3	\$36.76	8.32%
6	Shoppers	1	\$28.70	6.50%
7	7-Eleven	10	\$25.10	5.68%
8	CVS	5	\$24.50	5.55%
9	Publix	1	\$16.90	3.83%
10	Sheetz	2	\$11.30	2.56%
11	Aldi	1	\$8.80	1.99%
12	Fas-Marts	1	\$2.50	0.57%
13	Circle K	1	\$2.20	0.50%
		38	\$433.38	98.14%



SUFFOLK CITY (\$332.2 million)

• Population	98,537	• Female	51.3%
• # of Households	35,249	• White	48.0%
• Median Income	\$81,883	• Black	42.8%
• Under age 18	23.7%	• Hispanic	4.9%
• Over age 65	15.1%	• Asian	2.2%

1	Walmart (SuperCenter)	2	\$79.20	23.84%
2	Kroger (Marketplace)	2	\$77.10	23.21%
3	Food Lion	5	\$51.80	15.59%

See VIRGINIA COUNTY SHARE on page 122

VIRGINIA COUNTY SHARE OF MARKET: 2023

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4	Harris Teeter	1	\$28.90	8.70%
5	7-Eleven	11	\$27.10	8.16%
6	Walgreens	3	\$15.10	4.55%
7	Rite Aid	3	\$13.00	3.91%
8	Aldi	1	\$12.10	3.64%
9	Lidl	1	\$8.90	2.68%
10	Wawa	1	\$7.21	2.17%
11	CVS	1	\$5.50	1.66%
12	Miller Marts	2	\$3.90	1.17%
		33	\$329.81	99.28%

7	Walgreens	14	\$71.10	3.95%
8	Wawa	9	\$69.45	3.85%
9	Target	4	\$65.40	3.63%
10	CVS	13	\$61.70	3.42%
11	Aldi	6	\$50.70	2.81%
12	Rite Aid	16	\$48.20	2.68%
13	Sam's Club	1	\$46.40	2.58%
14	BJ's Wholesale Club	1	\$43.20	2.40%
15	Military Commissaries	1	\$42.03	2.33%
16	Whole Foods	1	\$36.50	2.03%
17	International Markets	2	\$30.10	1.67%
18	Lidl	4	\$28.20	1.57%
19	Fresh Market	2	\$27.30	1.52%
20	Trader Joe's	1	\$19.90	1.10%
21	Miller Marts	7	\$14.10	0.78%
22	Royal Farm Stores	1	\$4.10	0.23%
23	Circle K	1	\$2.20	0.12%
		207	\$1,807.08	100.29%*



SURRY COUNTY (\$3.7 million) (Includes Surry)

- Population 6,527
- # of Households 2,720
- Median Income \$61,105
- Under age 18 16.7%
- Over age 65 24.9%
- Female 49.9%
- White 53.9%
- Black 40.6%
- Hispanic 3.0%
- Asian 0.5%

1	7-Eleven	1	\$2.30	62.16%
		1	\$2.30	62.16%



WARREN COUNTY (\$170.4 million) (Includes Front Royal)

- Population 41,440
- # of Households 15,082
- Median Income \$72,840
- Under age 18 22.0%
- Over age 65 17.0%
- Female 49.7%
- White 84.5%
- Black 5.0%
- Hispanic 6.4%
- Asian 1.4%

1	The Giant Co. (Martin's)	1	\$65.10	38.20%
2	Walmart (SuperCenter)	1	\$44.70	26.23%
3	Target	1	\$18.20	10.68%
4	7-Eleven	8	\$14.10	8.27%
5	Aldi	1	\$8.10	4.75%
6	CVS	2	\$8.10	4.75%
7	Sheetz	1	\$5.80	3.40%
8	Royal Farm Stores	1	\$2.40	1.41%
9	Circle K	1	\$1.80	1.06%
		17	\$168.30	98.77%



SUSSEX COUNTY (\$8.2 million) (Includes Sussex, Wakefield)

- Population 10,680
- # of Households 3,656
- Median Income \$56,968
- Under age 18 15.1%
- Over age 65 18.1%
- Female 39.5%
- White 39.2%
- Black 55.6%
- Hispanic 3.7%
- Asian 0.5%

1	7-Eleven	1	\$3.10	37.80%
		1	\$3.10	37.80%



VIRGINIA BEACH CITY (\$1.8 billion)

- Population 455,618
- # of Households 177,046
- Median Income \$81,810
- Under age 18 22.0%
- Over age 65 15.2%
- Female 50.8%
- White 60.2%
- Black 20.5%
- Hispanic 8.9%
- Asian 7.6%

1	Food Lion	21	\$270.50	15.01%
2	Walmart (SC/Neighborhood Mkt)	7	\$251.30	13.95%
3	Harris Teeter	9	\$213.70	11.86%
4	7-Eleven	80	\$178.50	9.91%
5	Kroger (Marketplace)	5	\$159.80	8.87%
6	Wegmans	1	\$72.70	4.03%



WESTMORELAND COUNTY (\$50.2 million) (Includes Colonial Beach)

- Population 18,712
- # of Households 7,873
- Median Income \$53,113
- Under age 18 18.7%
- Over age 65 26.4%
- Female 50.6%
- White 64.3%
- Black 25.0%
- Hispanic 6.8%
- Asian 0.9%

1	Food Lion	2	\$28.10	55.98%
2	Walgreens	2	\$9.60	19.12%

See VIRGINIA COUNTY SHARE on page 123

VIRGINIA COUNTY SHARE OF MARKET: 2023

Continued from page 122

3	Great Valu	1	\$6.40	12.75%
4	7-Eleven	1	\$3.00	5.98%
5	Fas-Marts	1	\$2.40	4.78%
		7	\$49.50	98.61%

3	Walmart (SuperCenter)	1	\$44.30	21.84%
4	7-Eleven	6	\$17.10	8.43%
5	Wawa	2	\$16.17	7.97%
6	Walgreens	2	\$12.10	5.97%
7	Rite Aid	2	\$8.30	4.09%
8	CVS	1	\$4.80	2.37%
9	Royal Farm Stores	1	\$3.20	1.58%
		21	\$201.57	99.39%

() Name in parentheses indicates another banner used by the company.

*Combined retailer sales exceed 100% due to spill-in from other areas. Because of consumers purchasing items in one county, but residing in an adjacent one, or due to summer tourist traffic, leakage can occur. County food sales are formulated from population and annual expenditures of county residents.

Source: Food World, June 2023



YORK COUNTY Including POQUOSON (\$202.8 million) (Includes Yorktown)

• Population	71,341	• Female	50.5%
• # of Households	25,389	• White	68.6%
• Median Income	\$96,144	• Black	14.3%
• Under age 18	23.4%	• Hispanic	7.5%
• Over age 65	17.1%	• Asian	6.4%

1	Food Lion	4	\$50.90	25.10%
2	Kroger	2	\$44.70	22.04%

TRADE CALENDAR

June 24-25

The 31st annual BBQ Battle sponsored by Giant Food will be held in downtown Washington, DC. For more information, or to buy tickets, go to <https://bbqindc.com/>.

June 25-27

The Summer Fancy Food Show will be held at the Jacob Javits Center in New York City. For more information, go to www.specialtyfood.com/shows-events/summer-fancy-food-show/.

July 10-11

Weis Markets will hold its annual golf outing at several area courses near the company's Sunbury, PA headquarters.

July 16-17

Ahold Delhaize USA's annual charity golf outing will be held in Hershey, PA.

July 25

Weaver's of Wellsville will hold its summer food show at the Red Lion Hotel in Harrisburg, PA from 9:00 a.m. to 2:00 p.m.

August 3 - NEW DATE

Boyer's Markets will hold its golf outing at Mountain Valley Golf Club in Barnesville, PA.

August 8-9

Bozzuto's will host its two-day 2023 Merchandising Marketplace at Foxwoods Resort in Mashantucket, CT. To register, go to foodshow.bozzutos.info. For additional information, contact Don Anthony at 203.250.5651 or danthony@bozzutos.com.

in Reading, PA.

August 8-9

C&S will hold its Robesonia division selling show at the Lancaster Marriott at Penn Square.

August 8-9

UNFI will hold its 2023 conventional winter show at the Minneapolis Convention Center. For more information, go to www.unfi.com/shows-events.

August 8-10

FMI Fresh Forward – Envisioning Tomorrow's Fresh Foods at Retail – will be held at the Hilton Denver City Center. For more information at www.fmi.org.

August 15-16

C&S will hold its East Coast/Davidson division selling show at Mohegan Sun.

August 23

UNFI will hold its 2023 fresh specialty show at Fort Mason Festival Pavilion in San Francisco. For more information, go to www.unfi.com/shows-events.

September 13

Redner's Markets will host its annual GWR Memorial golf outing on several courses near its home office

September 20-23

Expo East will be held at the Pennsylvania Convention Center in Philadelphia. For more information, go to www.expoeast.com/en/exhibitor-resources/exhibit-2023.

September 27-28

UNFI will hold its 2023 natural winter show at Mandalay Bay in Las Vegas. For more information, go to www.unfi.com/shows-events.

October 7-10

The NFRA convention will be held in San Diego.

October 19-21

International Fresh Produce Association's 2023 Global Produce & Floral Show will be held in Anaheim, CA. For more information, go to www.freshproduce.com/events.

November 4

The 39th annual Children's Cancer Foundation Gala will be held at Martin's Crosswinds in Greenbelt, MD. Honorees will include EMD Sales, M&T Bank and Steve Coomes and the Coomes Family. For more information, or to download a sponsorship form, go to <https://childrenscancerfoundation.org/events-page/ccf-gala/>.

November 12-14

PLMA will hold its annual private label trade show at the Donald E. Stevens Convention Center in Chicago. For more information, go to www.plma.com/events.

go. For more information, go to www.plma.com/events/plmas-2023-annual-private-label-trade-show.

December 5-7

The New York Produce Show will be held at Jacob Javits Center in New York City. For more information, call 212.426.2218 or go to www.nyproduceshow.com/.

2024

January 18-21

The FMI Midwinter Conference will be held in Marco Island, FL. For more information, go to www.fmi.org/events-education/calendar.

February 20-21

UNFI will hold its 2024 natural and conventional spring and summer show at Loews Royal Pacific Resort in Orlando. For more information, go to www.unfi.com/shows-events.

March 10-12

The NGA show will be held at Caesar's Forum Convention Center in Las Vegas. For more information, go to www.ngashow.com.

March 10-12

Seafood Expo North America will be held at the Boston Convention and Exhibition Center. For more information, go to www.seafoodexpo.com/north-america/.

June 4-5

UNFI will hold its 2024 holiday

show at Mohegan Sun Resort and Casino in Uncasville, CT. For more information, go to www.unfi.com/shows-events.

June 9-11

IDDBA's Dairy Deli Bakery 2024 will be held in Houston.

August 6-7

UNFI will hold its 2024 conventional winter show at Minneapolis Convention Center. For more information, go to www.unfi.com/shows-events.

October 5-8

The NFRA convention will be held in National Harbor, MD.

October 17-19

The International Fresh Produce Association's annual show will be held in Atlanta.

2025

February 18-19

UNFI will hold its 2025 natural and conventional spring and summer show at Loews Royal Pacific Resort in Orlando. For more information, go to www.unfi.com/shows-events.

If you would like to publish an event in our trade calendar, please send information to Terri Maloney at terri@foodtradenews.com. Include a contact name and phone number, email address or web address for reservations or additional information. Trade Calendar can also be accessed online at www.foodtradenews.com/calendar.

A photograph of a woman with blonde hair and red nail polish eating a large burger. On the table in front of her are a tray of fries, a yellow mustard bottle, and a glass of Pepsi with the logo on it. The background is a light blue wall.

**BURGER
NIGHT
DONE
RIGHT**

#BETTERWITHPEPSI
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