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39 Mid-Atlantic Notables Attend JOH Dinner At IDDBA In Orlando



70 Vendors, Associates Celebrate At Karns Annual Charity Outing

Food World

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Vol. 82 No. 6

MARKET STUDY ISSUE

June 2026

TAKING STOCK

by Jeff Metzger



Discounters Once Again Claim Victory As More Market Uncertainty Continues

The delineation between traditional supermarkets and discount retailers (in all channels) has never been more clear. Except for the COVID years (2020-2023) when eating-at-home and inflation benefited virtually every retailer, the discounters have continued to nibble away share from the conventional supermarkets in every individual market in our 48th annual market study.

And as affordability becomes an even more visceral issue for an increasing number of consumers, traditional supermarkets (which still

TAKING STOCK continues on page 6

Aldi, Costco, Trader Joe's Among Few Gainers in \$64.4B Region

Walmart Still Atop Leaderboard Over Giant; Affordability Is Key

Affordability. As we publish our 48th annual Retail Market Study for the Mid-Atlantic, that word became increasingly important to both consumers and retailers as economic struggles continued to impact most merchants in the 89-county region.

Walmart again paced all retailers selling food and drugs, enjoying one of the best years of all operators in the region, despite not opening any new stores in the \$64.4 billion marketing area. The "Bentonville Behemoth" delivered some of the best comp store sales in the Mid-Atlantic, particularly

powered by its 94 SuperCenters in DE, MD, PA and VA. However, over the next 12 months, Walmart plans on upgrading 61 of its 157 stores in the market.

Giant Food, which until last year led all retailers in the Mid-Atlantic, produced decent comp store sales but like many other traditional supermarket chains, found that overstocking and fierce competition, primarily for discount operators made significant gains hard to find. An additional factor this year for merchants operating around Washington DC was the significant amount of jobs cutting by the federal government. However, the Landover-based Ahold Delhaize USA brand continued to dominate Baltimore-Washington market, the region's largest marketing area.

The market study 12-month

measuring period runs from April 1, 2025, to March 31, 2026,

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

As noted, while Walmart once again didn't open any new units, the company's strong price image fueled significant comp store sales increases and helped the country's largest retailer (and national grocery leader, too) maintain its leadership position among the 58 retailers we surveyed. We estimated that the Bentonville, AR company posted estimated extrapolated sales of \$6.77 billion, a solid gain over last year's extrapolated volume of \$6.56 billion.

For Giant Food, it was another year of defending its turf against discounters like Walmart, Aldi

See **MARKET STUDY** on page 50



IDDBA 2026 WAS HELD JUNE 7-9 AT THE ORLANDO CONVENTION Center. Among the region's retailers in attendance were Jonathan McCrudy, Heather Beck, Kim Cozzolino and Lacy Norton of Publix. Additional photos are on pages 16 and 17.

Former Amazon Leader Will Replace Fleeman

Peters Named Ahold Delhaize USA Chief Exec Effective September 8

Ahold Delhaize has found its new U.S. leader. The Zaandam, Netherlands-based grocery chain named former Amazon executive Claire Peters to become CEO of Ahold Delhaize USA (ADUSA) and nominated her to become a member of the management board of Ahold

Delhaize. Peters will join Ahold Delhaize on September 8 as CEO of Ahold Delhaize USA; the appointment as member of the management board is subject to shareholder approval

See **ADUSA** on page 30

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Lidl Veteran Alan Barry Promoted To Chief Executive Officer For U.S. Stores

The merry-go-round continues at Lidl U.S. Next month, Alan Barry will become the German discounter's latest U.S. chief executive, its seventh CEO to lead the retailer in the U.S. since 2013. The latest leadership move seems to reinforce how difficult Lidl's American expansion continues to be nearly since it opened its first U.S. stores nine years ago.

Barry will be replacing interim CEO Marco Giudici, who

in turn replaced Joel Rampoldt, a former consulting executive, who departed in January of this year. Prior to Rampoldt, four others held the role of Lidl's U.S. top dog over the past 13 years starting in 2013 with Kenneth McGrath, who departed in 2015 (but returned to Lidl corporate in 2021), two years before the merchant opened its first stores in the U.S. (it opened nine stores simultaneously on June 15, 2017

in Virginia, North Carolina and South Carolina). McGrath was followed by Brendan Procter, Johannes Fieber and Michal Lagunioneck, all former Lidl executives who worked for the retailer in Europe where it is very successful.

Barry has served as chief operating officer and executive VP-operations of Lidl U.S. since 2024. Previously, he was chief development officer for the company in Ireland,

Northern Ireland and Great Britain. He first joined Lidl in 2007 after graduating from Dublin City University.

With Barry's promotion, a new leadership team will be joining him. Maciej Tylkowski, currently serving Lidl in Great Britain in supply chain and sales, will relocate to the U.S. to become COO. Additionally, Jassine Ouali, chief customer officer for Lidl France, will assume that same position in the

U.S. next month.

Currently Lidl operates about 200 stores in the U.S. covering nine states and Washington, DC. It maintains its U.S. headquarters in Arlington, VA.

Globally, the company is part of the Schwarz Group, headquartered in Neckarsulm, Germany. It operates more than 12,000 discount stores in 31 countries, employing more than 350,000 associates.

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From the Desk Of The Executive Editor

Why The Store Of The Future Needs Electronic Shelf Labels (ESLs)

Legislatures are restless; they sense the barbarians at the gate for the coming election cycles. What better way to score populist points than by attacking rising food costs? But instead of trying to solve the underpinning economic problems causing these issues, they've decided to focus on the evils of technology and "Big Grocery" as the culprit...

Maryland, Connecticut, and New York have been the first of many rushing laws through their statehouses to prevent dynamic pricing. Electronic shelf labels (ESLs) have been an ancillary target of these attacks on the industry. But they've got it all wrong: predatory surge pricing and ESLs are two separate issues.

The country's largest grocer, Walmart, announced that it would roll out ESLs in all of its U.S. stores by the end of 2026. Grocery heavyweights Kroger, Aldi and Amazon Grocery (Whole Foods) are all rolling the tech out across the country. The ESL market, valued today at just over \$2 billion, is expected to grow to \$7.3 billion by 2033. ESLs are here to stay.

For years, discussions about electronic shelf labels have centered on a familiar set of benefits: labor savings, pricing accuracy, and the elimination of countless hours spent replacing paper tags. Those benefits are real; they're important. But they are also missing the bigger picture.

The Case For ESLs

The grocery industry has spent decades digitizing almost every aspect of their operations: payments, loyalty programs, inventory, ordering, supply chains... Yet the most important point of decision in the store – the shelf itself – remains largely analog.

The truism that the shelf is where "grocery wins or loses the trip" exists for a reason, and electronic shelf labels can help in so many different ways.

ESLs are not simply a technology investment, they are infrastructure. And like most forms of infrastructure, their value compounds over time. When interstate highways were built, the benefit wasn't simply easier travel or decreased transit time. Entire industries emerged because of the network that was created.

The same principle applies here when the shelf becomes truly connected. It fundamentally alters how stores operate.

Traditionally, price changes have been operational events. A decision is made somewhere in headquarters, a file is generated, labor is scheduled, tags are printed, and associates execute the change. The process is expensive, time-consuming, and prone to error.

Operational efficiency-monster Walmart reports that the older paper price tag system can eat up two full days of employee time, per week. A typical supermarket has over 30,000 SKUs with thousands of price changes weekly.

With ESLs, pricing becomes data-driven rather than labor-driven.

Changes can occur instantly and promotions can be deployed with precision as pricing discrepancies decline. Store teams spend less time maintaining the 'ticker-tape' parade of shelf price-tags and more time stocking or serving customers. Compliance improves, too.

Think of this use-case as a basic Level 1; a huge improvement in labor costs and accuracy, though not much more. But the potential benefits only get better.

The Level 2 beneficiary is the customer. Consumers increasingly expect the same speed, accuracy, and responsiveness inside stores that they experience online. That means access to data on things like: country of origin, organic ratings, inventory levels, customer reviews, nutrition, ingredients, and a variety of other data points. Paper tags and product packaging simply can't provide this.

Customers expect fairness, transparency, and consistency – these connected shelf labels offer a solution for customers to learn so much more.

Few industries rely more heavily on trust than grocery retail. Can you imagine the trust built by allowing a customer to pull up a product's price history to see if the discount is a good one? Look at how consumers research and evaluate Black Friday "sales" today versus their mindless buying of 15 years ago. Providing pricing history data to customers might be the solution to dynamic pricing concerns.

But what about dignity? Having



Alexander Wissel

ESLs note a government approved item for SNAP or EBT saves a customer from learning it's not approved at the register in front of an audience. Consider the ability to have prices relayed audibly or enlarged for those with difficulty seeing. There are multiple ways ESLs can offer help to older shoppers or those with disabilities.

We've talked about nutrition and allergens with new product labelling. For customers who have a life-threatening allergy; or a family member that does, knowing if a product contains harmful allergens is exhausting. Imagine an ESL that allows them to easily check.

Colorful ESLs can highlight active sales, allergen friendliness, whether an item is SNAP approved, and they can bring the same color coding messaging that shoppers are used to.

These are just a few of the Level 2 ESL benefits customers could see – all of them improving in-store shopper experience. The larger opportunity lies in the convergence of digital commerce and physical retail.

The Connected Store

We know that retailers are investing heavily in personalization, loyalty ecosystems, retail media networks, and artificial intelligence. Each of these initiatives depends on one critical factor: the ability to connect decisions made in software to actions occurring at the shelf.

Electronic shelf labels provide a platform upon which future capabilities – like dynamic promotions, real-time inventory, omni-channel experiences, and AI-driven merchandising – can be built. These Level 3 benefits for retailers are massive.

For in-store fulfillment imagine in-store GPS highlighting not just where the product is, but the fastest way to get there – and a flashing signal light when the associate is nearby.

Consider a future in which inventory levels, demand forecasts, category pricing, weather conditions, and promotional performance are all analyzed continuously. The ability to translate those insights instantly from the shelf is no longer theoretical.

Efficiency focuses on doing things cheaper; agility focuses on responding faster. The grocery industry has historically focused on operational efficiency. The next decade may require the same level of attention to operational agility.

AI-assisted technology can actually make that happen in ways that weren't practical before. Electronic shelf labels may be one of the most important – and most overlooked – building blocks in making the connected, agile future possible.

See **EXECUTIVE EDITOR** on page 36



PUBLISHED THE FIRST MONDAY OF EACH MONTH

By Best-Met Publishing Co., Inc., Publishers of *Food World* and *Food Trade News*

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Food World (USPS 203-920, ISSN 0191619x) 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

control the landscape in most Mid-Atlantic marketing areas) are less in control of their own destinies than ever before.

Non-discount operators like Trader Joe's and Wegmans continue to outperform their peers, but neither merchant has a commanding presence in any individual market that we cover. A more likely scenario throughout the region stacks discounters such as Walmart, Aldi, Costco and BJ's battling (and mostly winning) against Giant Food, Safeway and Kroger/Harris Teeter.

We're not talking about game changing market share shifts. However, every year the discounters generally continue to post the best comp store sales increases and open the most locations in any given market in our nearly \$65 billion marketplace.

There are also other factors at play besides overstoring and differentiated competition. The significant reduction in SNAP benefits has created a void that many retailers can't replace. And as I noted last year, market expansion for most supermarket retailers has been very challenging. Real estate continues to be both scarce and expensive. And with the average cost to build a 60,000 square foot supermarket today running somewhere north of \$30 million, it's no wonder that most retailers are prioritizing remodeling their stores rather than gambling on building new units. Of the top 10 supermarkets in the Food World marketing area, only Publix and Whole Foods have at least five new stores planned during the next three years. That's a far cry from 15 years ago when Giant, Safeway, Kroger/Harris Teeter, Food Lion and The Giant Co. would average about three new stores a year. Conversely, Aldi, Lidl, Trader Joe's and Sprouts have more than between eight and 15 new stores planned for that time period.

As for this past year, for the 48th time, here's my annual analysis of the market leaders in Food World's largest trading area, the Balti-

TAKING STOCK continues on page 51

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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. Our measuring period ranges from 4/1/25 to 3/31/26.

Beginning in 2024, inflation began to moderate and while still a factor, the rate of grocery price increases was the lowest since 2019 for the majority of our measuring period which runs through March 31, 2026. However, beginning on March 1 and continuing currently, inflation has soared, primarily due to the war in Iran, and returned to levels not seen since COVID.

As occurs every year, there are several counties where collective revenue from the 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.

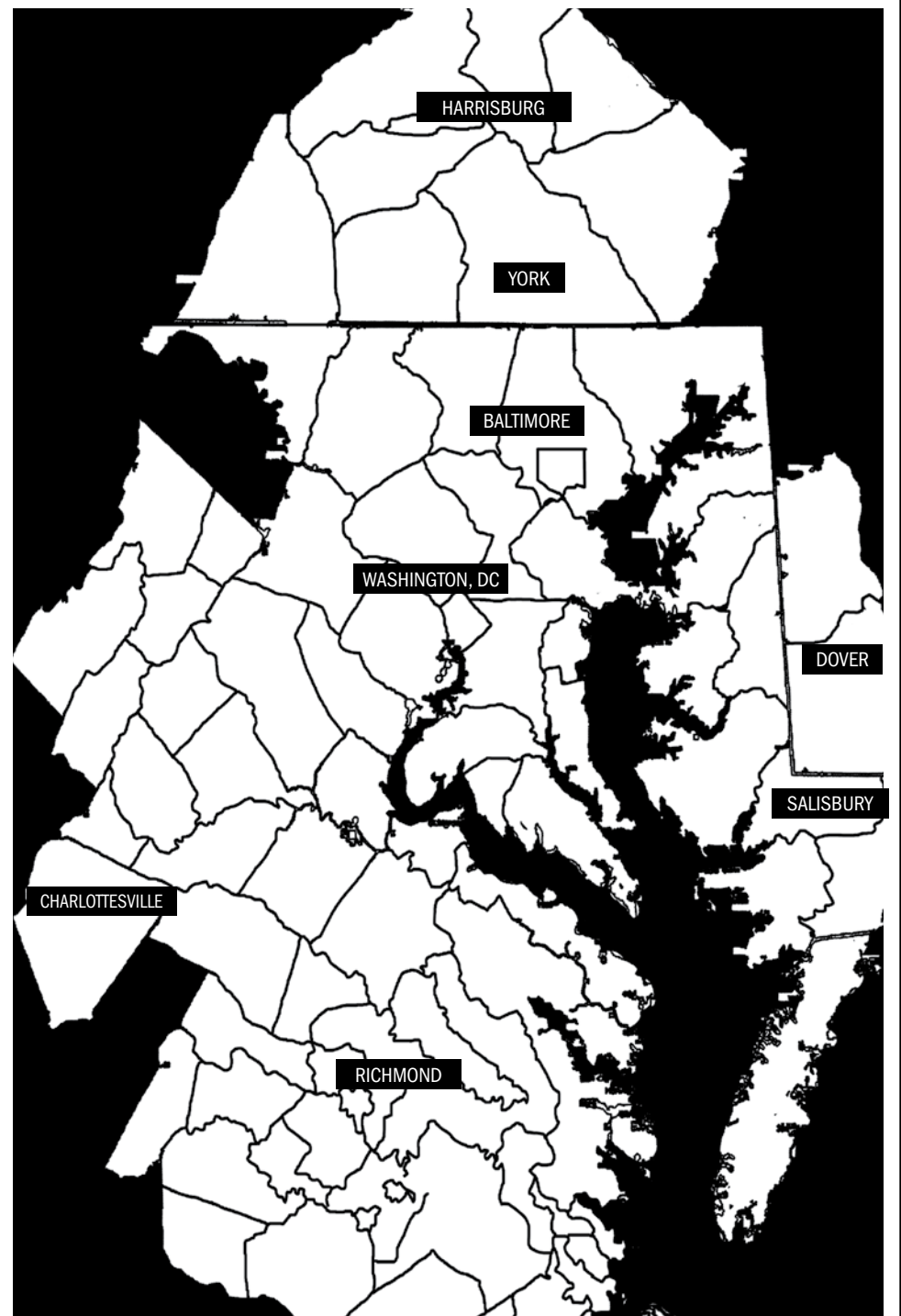
Leakage, or “county-hopping,” can result from a sparsity of stores in one county causing consumers to shop in a bordering county where food retailing opportunities are more available, creating a build-up of food sales in those areas. High volume retailers such as Walmart, Costco and Wegmans, which operate 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 St. Mary’s, MD; Cumberland, PA; Chesterfield, VA; Loudoun, VA; and Orange, VA. This can also happen if new stores are opened in a county that is geographically adjacent to another county such as in Cumberland County, PA where Costco opened a new club store and rival BJ’s also cut the ribbon on a replacement store in that same Central PA jurisdiction. Additionally, in St. Mary’s County, MD where Weis opened three large supermarkets.

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.



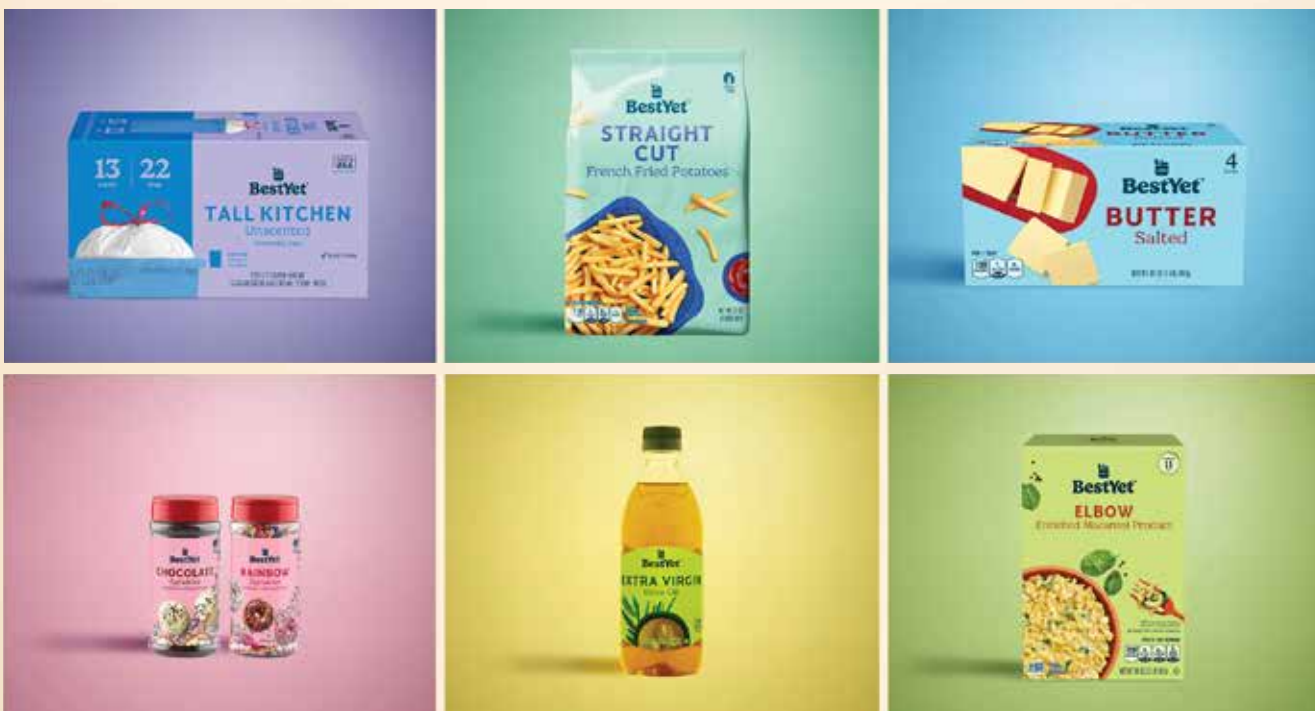


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FOOD WORLD'S LEADING CHAIN STORES: 2026

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 88. Petroleum sales are not included.

Total sales of retail grocery, drugs, HBC, general merchandise and tobacco products in the Mid-Atlantic area are \$64.4 billion.

Rank	Company	2026 Sales Stores	2026 % of (in millions)	Area Market
1	Walmart (SuperCenter/Neighborhood Mkt.)	157	\$6,769.90	10.51%
2	Giant Food	160	\$6,625.10	10.29%
3	CVS	570	\$3,911.70	6.07%
4	Food Lion	256	\$3,568.50	5.54%
5	Albertsons Mid-Atlantic (Acme/Balducci's/Safeway)	122	\$3,520.40	5.47%
6	The Giant Company (Martin's)	63	\$3,159.60	4.91%
7	7-Eleven	1,130	\$3,028.10	4.70%
8	Wegmans	27	\$2,548.40	3.96%
9	Harris Teeter	74	\$2,460.30	3.82%
10	International Markets	146	\$2,344.50	3.64%
11	Costco	31	\$2,311.60	3.59%
12	Target (Super Target)	113	\$2,285.60	3.55%
13	Weis Markets	104	\$2,255.16	3.50%
14	Walgreens	289	\$1,946.10	3.02%
15	Wawa	216	\$1,659.00	2.58%
16	Amazon Grocery (Whole Foods/Daily Shop)	39	\$1,613.60	2.51%
17	Aldi	160	\$1,558.00	2.42%
18	Kroger (Marketplace)	37	\$1,429.80	2.22%
19	BJ's Wholesale Club	30	\$1,260.00	1.96%
20	Sam's Club	26	\$1,194.90	1.86%
21	Trader Joe's	36	\$1,021.50	1.59%
22	Royal Farm Stores	271	\$916.80	1.42%
23	Military Commissaries	20	\$895.10	1.39%
24	Sheetz	167	\$728.60	1.13%
25	Lidl	64	\$582.30	0.90%
26	ShopRite (Klein's/Village/Price Rite)	13	\$429.50	0.67%
27	Shoppers	14	\$409.10	0.64%
28	Publix	23	\$397.60	0.62%
29	MOM's Organic Market	20	\$330.10	0.51%
30	Redner's Markets (Cost Boss)	14	\$325.10	0.50%
31	Sprouts	13	\$239.70	0.37%
32	The Fresh Market	17	\$235.80	0.37%
33	Turkey Hill	112	\$193.60	0.30%
34	Rutter's Farm Stores	73	\$184.30	0.29%
35	Save A Lot	29	\$180.10	0.28%
36	Fas-Marts	88	\$175.80	0.27%
37	Grocery Outlet	22	\$136.90	0.21%
38	Dash-In	49	\$112.70	0.18%
39	C&S Independents	66	\$110.40	0.17%
40	High's	52	\$101.60	0.16%
41	IGA	6	\$60.77	0.09%
42	Giant Eagle	2	\$43.70	0.07%
43	Circle K	15	\$38.10	0.06%
44	Miller Marts	11	\$26.40	0.04%
45	Great Valu	3	\$25.80	0.04%
46	America's Food Basket	1	\$7.90	0.01%
47	Key Food	2	\$7.28	0.01%
48	ASG	1	\$1.30	0.00%
GRAND TOTAL		4,954	\$63,368.11	98.40%

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

Source: *Food World*, June 2026

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Ahold Delhaize USA CEO: Claire Peters*
Chief Comm./Digital Officer: Keith Nicks
Chief Supply Chain Officer: Sanja Krajnovic
*Effective September 8, 2026

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Liquor Sales Mgr.-Acme/Safeway: Tim Ley
Floral Sales Mgr.-Acme/Safeway: Katie Vazquez
Micro-Markets Sales Mgr.-Acme/Safeway: AnneMarie Mozzone
Own Brand Sales Mgr.-Acme/Safeway: Christine Leatherwood
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Produce Sales Mgr.-Kings/Balducci's: Joe Lerario
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Groc. Sales Mgr.-Kings/Balducci's: Ken Thompson
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Dir.-Marketing.: Sherry Caldwell
Marketing Mgr.-Acme/Safeway: Angel Oswald
Marketing Mgr.-Kings/Balducci's: Olivia Mastro Monaco
Sr. Marketing Program Coord.: Richard Miller
Dir.-Comms./PR: Dana Ward
Project Mgr.: Sue Rorke-Lawler
Pricing Mgr.: Melissa Fadelsak
Vendor Funds Mgr.: Brad Cohen
Corporate offices:
250 Parkcenter Blvd.
Boise, ID 83706
Phone: (208) 395-6200
Pres./CEO: Susan Morris
Web: Albertsons.com

Primary Supplier: Direct
FW Stores: 122 (Includes Acme Markets, Balducci's, Safeway)
FW Volume: \$3.52 billion

Aldi, Inc.

1200 N. Kirk Rd.
Batavia, IL 60510
Phone: (630) 879-8100
Web: aldi.com
CEO: Atty McGrath
COO: Karla Waddleton
CFO: David Behm
Marketing Dir.: Katherine Sodeika
Primary Supplier: Direct
FW Stores: 160
FW Volume: \$1.56 billion

Amazon Worldwide Grocery Stores

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VP-Amazon Grocery/CEO-Whole

See **DIRECTORY** on page 62



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FOOD WORLD MARKET STUDY 2026: RULES & ANALYSIS

While the fiercely competitive landscape remains, there was finally some movement among the retailers in the Mid-Atlantic market which did affect market share to some degree.

As you might recall, I've been puzzled for the past few years about why many struggling retailers have chosen to continue to fight a losing battle in a marketplace that is not only grossly overstored but also offers consumers a multitude of diverse shopping options.

However, during the past 12 months we saw the market withdrawal and liquidation of Rite Aid (112 stores in our trading area), the closure of 36 Grocery Outlet stores (eight in our market), the sudden shuttering of all Amazon Fresh and Amazon Go stores (14 in our region) and the continuing decline of Shoppers Food (eight closed stores), which seems destined to soon shutter its remaining 14 Baltimore-Washington stores - which all created a narrow growth lane in the region.

While Rite Aid's exit certainly helped rivals CVS and Walgreens as well as some traditional supermarkets and Walmart, the challenges of fighting the on-field battle given real-time issues such as tariffs (which were declared illegal by the U.S. Supreme Court in February) and declining SNAP benefits, still hampered the majority of retailers in the 89-county region, particularly traditional supermarkets.

And much like it's been over the past decade, those retailers with a discount slant like Walmart, Aldi, Costco and BJ's fared the best among the 70 operators we measured in our annual survey.

There were a few other non-discounters that deserve a "thumbs up" in this difficult environment - Wegmans, Trader Joe's and Wawa - but survival once again took priority over big growth, at least as it's measured in market share.

In my opinion, the inherent difficulty of food retailing and current market conditions have created a current mindset held by many retailers that, by holding their own at most stores and then creating small victories at a smaller group of stores, that counts as progress.

As we've done since 1979, let's review the key individual markets in the \$64.4 billion region and assess and analyze what's occurred over the past year.

Baltimore-Washington

In the largest individual marketing area within the Mid-Atlantic, gridlock again persisted. That's because market leaders Giant Food and Safeway control more than 25 percent of the \$37.9 billion territory, and real estate is scarce and costly. With little new store activity (save for Weis in southern Maryland, Aldi and Trader Joe's), not much changed in measuring market share of individual retailers. However, as noted above, those retailers that seemed to resist closing stores despite underperforming results are starting to yield. Grocery Outlet closed eight units, the same number as Shoppers (which dropped out of the top 20); Amazon Fresh closed all 10 B-W stores; and Harris Teeter, once the fastest growing retailer in the Washington area, closed four units as it continues its path towards mediocrity. If parent company UNFI decides to finally pull the plug on its long suffering

Shoppers operation, look for Giant to be the biggest beneficiary.

Eastern Shore

The only significant change of the past 12 months was the closing of Rite Aid's 22 stores on the Delmarva Peninsula. Most of the now-extinct drug chain's share was gobbled up by Walgreens and CVS. And other than that, not much happened in the \$3.2 billion 12-county market which covers three states. Walmart remained the dominant player, and this year again increased market share on the strength of healthy comp store sales gains at its 14 stores, almost all of them SuperCenters. Food Lion, which operates the most stores in the region (other than c-stores) also benefited slightly from solid same store revenue. Aside from 7-Eleven opening a new c-store, all of the remaining 19 other top merchants on the Eastern Shore operated the same number of stores as the previous year. And even future new store activity seems minimal with a new Giant store in Berlin, MD slated to open later this year. Additionally, Acme will be replacing its Ocean City, MD supermarket and Aldi is planning to open a new discount unit in Seaford, MD. Last month, the Sussex County, DE council unanimously rejected a bid to develop Atlantic Fields, a huge mixed-use project near Rehoboth Beach that was set to include Whole Foods, Costco and Target.

Central Pennsylvania

Another overstored, diverse and gridlocked market, Central Pennsylvania remains the domain of The Giant Co. (TGC), the non-union brand of Dutch retail conglomerate

Ahold Delhaize. Even with a slew of discounters to compete with - Walmart, Aldi, Grocery Outlet and Lidl - TGC continues to sell more stuff than any other merchant in the \$7.53 billion eight county MSA. While the Carlisle, PA-based retailer operated the same number of stores as last year - 52 - it did acquire two former independent stores in Everett, PA and Saxton, PA after our market study measuring period closed. As for other retailers, Weis maintained its narrow lead over Walmart for second place in Central PA and with the closure of 47 Rite Aid units, CVS benefited the most, gaining nearly a full share point since 2025. Also of note was the debut of a new Costco in Silver Spring Township and the opening of a replacement BJ's store in nearby Mechanicsburg, giving consumers even more shopping options, while creating agita for other retailers.

Richmond

There was time not too long ago when Richmond was one of the most watched markets in the country due to the entry and emergence of new retail competition. Within a period of years, Wegmans, Publix and Lidl all entered the market and Kroger, Walmart and Aldi also ramped up their expansion efforts. Today, Richmond is caught in the same inertia that faces many of its neighboring markets - limited new store activity and figurative hand-to-hand combat on the battlefield. That environment certainly suits Walmart, which again gained share of market over rival Kroger primarily due to its discount pricing image which resulted in strong comp store sales. Food Lion was a solid third, but when its smaller format

stores have to compete with its larger competitors, product variety, average ring and traffic work to the disadvantage of the Salisbury, NC-based Ahold Delhaize USA brand. Don't look for much to change soon, the only new project we have listed for the \$4.88 billion market is a Whole Foods stores coming to Midlothian.

Tidewater

In somewhat of a surprise, the \$6.81 billion Hampton Roads area did see some market shifting. Not among the frontrunners where Food Lion continues atop the leaderboard, but each year since 2015, the "Bentonville Behemoth" has continued to gain market share at Food Lion's expense. However, with 81 stores in the widespread market versus Walmart's 29 (mainly SuperCenters), the ADUSA brand will always win the location battle. The shift? That comes from two areas. First from the significant gains made by Tidewater's six military commissaries which had their best year of growth since 2002. That fact alone should speak volumes about the economic concerns of those residents with military affiliations. Secondly, with the closure of 21 Rite Aid stores, CVS and Walgreens became the primary beneficiaries of the drug store hole created. Also of note is the presence of 7-Eleven, which operates a whopping 249 stores in the market which is comprised of 10 cities and counties in southeast Virginia. As for future new stores, Publix is continuing its push into Tidewater with a new supermarket coming in Yorktown. Target will also be opening a new store later this year in the

See **RULES & ANALYSIS**
on page 88

FOOD WORLD'S LEADING INDEPENDENTS: 2026

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

Rank	Company	2026 Supermarkets	2026 (in millions)	2025 Supermarkets	2025 (in millions)	Headquarters	Primary Supplier
1	Karns Prime & Fancy Foods	10	\$183.00	10	\$186.00	Mechanicsburg, PA	UNFI
2	Family Owned Markets	7	\$128.90	7	\$129.30	Millersville, PA	MDI
3	B. Green Corp Stores	5	\$109.00	7	\$146.40	Baltimore, MD	UNFI
4	Streets Market	11	\$94.20	12	\$104.00	Washington, DC	Bozzuto's
5	Graul's	5	\$58.50	5	\$58.10	Baltimore, MD	UNFI
6	Sharp Shopper	4	\$54.10	4	\$55.20	Ephrata, PA	Direct
7	Eddie's of Roland Park	2	\$41.90	2	\$38.70	Baltimore, MD	Bozzuto's
8	Geresbeck's Food Market	3	\$35.80	3	\$35.70	Baltimore, MD	C&S
9	Roots Markets	2	\$24.40	2	\$24.30	Clarksville, MD	UNFI
10	Boyer's Markets	1	\$9.83	1	\$10.40	Orwigsburg, PA	Wakefern
GRAND TOTAL		50	\$739.63	53	\$788.10		

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

Source: Food World, June 2026



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IDDBA 2026 was held June 7-9 at the Orlando Convention Center. Attending from the Food World market were H&S Bakery's Shawn Paterakis, Ryan Paterakis and Emily and JR Paterakis.



Taking care of business at the show for Redner's Markets were Jenn Harper and Katelyn Mertz.



Tony Mammarella (r) of K-VA-T Food Stores stopped to try some samples at the Reser's Fine Foods pavilion manned by Megan Torres and Matt Allen.



Stephen Fay of Walmart Connect is joined in this photo by Dan Setlak of Chairmans Foods.



In attendance from Food Lion were Heather Ward, Jenny Love, Chris Holmes, Ronda Pendergrass, Noelle Berry, Karen Gadwah and Nick Delacruz.



This Ahold Delhaize USA foursome features John Barnette, Aspen Burke, Jessica Saltzman and Shane Brown.



Attending the show from Wegmans were Dan Baeder, Geoff Parker, Jerritt Branagen, John Antinore and Joshua Cooman.



These fine folks are Kimberly Diaz and Heidi Rayher of Grocery Outlet and Damian Burnside, Greg Somerville and Luke Burnside of Maple Donuts.



Traveling to Orlando for IDDBA from the Central PA market are The Giant Company's Jordan Hoffer, Kathy Schmidt and Chris Sheipe.



This Albertsons Companies trio features Megan Budavich, Jeff Stewart and Tony Ozawa.



Marbel Ramirez (c) of Amazon Grocery is joined here by Whole Foods' Dan Krause and Jessico Povo.



Handling business at IDDBA for Affinity Group are Dallas Lynch, Enzo Dentico, Bill Chiodo, Shane Coughlin and Brian Ralston.

Sunny Florida For IDDBA 2026 Show Held June 7-9 At Orlando Convention Center



Richmond, VA-based Ukrop's Homestyle Foods is well represented at the show by Laurie Borden, Joya Carlton and Brandy Seay.



All smiles for our camera are Taylor Farms' Jennifer Watts, JD Morton and Dan Ferraiolo.



This C&S Wholesale Grocers group shot includes Maryann Sawyer, Jeff Harrell, Vince Catanzaro, Brenda Smith and Mark Gaedje.



JR Paterakis (c) of H&S Bakery is flanked in this photo by CA Ferolie's Wil Magistrelli and Ernie Vespole.



The Belgioioso team traveling to IDDBA includes Tim Cronin, Sean Moran, Monica Spaulding and Gaetano Auricchio.



These Wakefern gentlemen are Bill Meyer, Darren Caudill and Travis Riepenhoff.



This Dietz & Watson family portrait features Louis and Nina Eni, Dylan Eni and Chris Eni.



This Catalina Food Group photo includes Kelbi Santana, Rebecca Flores-Pena, Sonia Wells, Jessica Canto, David Martinez and Carol Gutierrez.



From Amoroso Baking, our camera spotted Jesse Amoroso, Kate MacIvain, Kelsey Thompson and Len Amoroso.



Alexa Nemeth and Kelly Abrahamson of Kreider Farms check out the latest at the IDDBA show.



AJ Letizio is well represented at IDDBA by (standing) Wanda Davis, Bill Shields, Bill Sando, Christina Chojnowski, Mike Batta, Geoff Mason, Marc DiPersio, Amy Tessitore, (kneeling) Kevin O'Donnell, Deb Galliher, Mike Ensalaco Jr., David McQuaide, Jim Campbell and Tom Scheidt.



Making their way to Florida from the Philly market are Vincent Giordano Corp.'s Justine Giordano and Shane Hampson.

Washington Supermarket Leaders

- Sales Flat, Giant Still Commands
- On No New Stores, Albertsons Dips
- International Mkts. Add 4 Stores
- Aldi Opens 3, Gains Share Again
- Amazon Pulls Plug On AF

Rank	Company	2026 Stores	2026 Sales (in millions)	% of 2026 Market	2025 Stores	2025 Sales (in millions)	% of 2025 Market
1	Giant Food	113	\$4,419.90	28.37%	112	\$4,341.50	28.62%
2	Albertsons (Acme/Balducci's/Safeway)	85	\$2,425.30	15.57%	86	\$2,415.40	15.92%
3	International Markets	113	\$1,887.50	12.11%	109	\$1,826.10	12.04%
4	Wegmans	16	\$1,631.80	10.47%	15	\$1,522.70	10.04%
5	Harris Teeter	39	\$1,444.80	9.27%	43	\$1,555.70	10.25%
6	Amazon Groc. (WFM/Daily Shop)	28	\$1,213.40	7.79%	33	\$1,204.60	7.94%
7	Trader Joe's	25	\$778.40	5.00%	22	\$666.00	4.39%
8	Aldi	60	\$644.50	4.14%	57	\$590.80	3.89%
9	Weis Markets	28	\$507.88	3.26%	24	\$399.29	2.63%
10	Food Lion	32	\$455.40	2.92%	32	\$466.10	3.07%
		539	\$15,408.88	98.89%	533	\$14,988.19	98.79%

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 \$15.58 billion**

Source: Food World, June 2026

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Washington Market Leaders

- Alt. Channels Share Up To 33.7%
- Giant Food Still Rules DC Area
- CVS, Walgreens Grow Share
- Strong Comps Aid Walmart
- Costco Enjoys Stellar ID Sales

Rank	Company	2026 Stores	2026 Sales (in millions)	% of 2026 Market	2025 Stores	2025 Sales (in millions)	% of 2025 Market
1	Giant Food	113	\$4,419.90	16.68%	112	\$4,341.50	16.83%
2	Albertsons (Acme/Balducci's/Safeway)	85	\$2,425.30	9.15%	86	\$2,415.40	9.37%
3	International Markets	113	\$1,887.50	7.12%	109	\$1,826.10	7.08%
4	CVS	238	\$1,672.80	6.31%	244	\$1,644.20	6.38%
5	Wegmans	16	\$1,631.80	6.16%	15	\$1,522.70	5.90%
6	Walmart (SuperCenter)	39	\$1,525.00	5.75%	39	\$1,490.20	5.78%
7	Costco	17	\$1,472.50	5.56%	17	\$1,401.60	5.43%
8	Harris Teeter	39	\$1,444.80	5.45%	43	\$1,555.70	6.03%
9	7-Eleven	519	\$1,419.90	5.36%	517	\$1,359.70	5.27%
10	Amazon Groc. (WFM/Daily Shop)	28	\$1,213.40	4.58%	33	\$1,204.60	4.67%
11	Target (Super Target)	49	\$1,126.30	4.25%	48	\$1,068.50	4.14%
12	Trader Joe's	25	\$778.40	2.94%	22	\$666.00	2.58%
13	Aldi	60	\$644.50	2.43%	57	\$590.80	2.29%
14	Walgreens	87	\$606.60	2.29%	93	\$619.00	2.40%
15	Weis Markets	28	\$507.88	1.92%	24	\$399.29	1.55%
16	Food Lion	32	\$455.40	1.72%	32	\$466.10	1.81%
17	BJ's Wholesale Club	9	\$392.90	1.48%	9	\$381.10	1.48%
18	Wawa	56	\$372.70	1.41%	56	\$365.55	1.42%
19	Military Commissaries	7	\$351.60	1.33%	8	\$251.83	0.98%
20	Lidl	35	\$337.20	1.27%	32	\$308.80	1.20%
		1,595	\$24,686.38	93.15%	1,596	\$23,878.67	92.59%

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 88. 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 \$26.5 billion.** Source: Food World, June 2026

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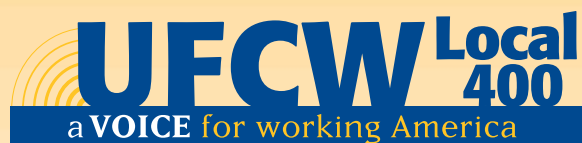
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A handwritten signature in blue ink, appearing to read "Mark P. Federici".

Mark P. Federici
President and International Vice President

A handwritten signature in blue ink, appearing to read "Chris Hoffmann".

Christopher Hoffmann
Secretary-Treasurer

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Baltimore Supermarket Leaders

- Giant Extends Lead
- Safeway Sales Remain Flat
- Wegmans Tops Per-Store Sales
- Aldi Posts Strong Comps
- RIP Amazon Fresh


Rank	Company	2026 Stores	2026 Sales (in millions)	% of 2026 Market	2025 Stores	2025 Sales (in millions)	% of 2025 Market
1	Giant Food	41	\$1,905.10	34.23%	41	\$1,863.60	34.06%
2	Albertsons (Acme/Safeway)	27	\$811.60	14.58%	27	\$809.50	14.80%
3	Weis Markets	25	\$568.07	10.21%	25	\$557.93	10.20%
4	Wegmans	5	\$494.20	8.88%	5	\$485.00	8.86%
5	ShopRite (Klein's/Village/PR)	10	\$383.10	6.88%	10	\$372.50	6.81%
6	International Markets	22	\$330.60	5.94%	21	\$314.70	5.75%
7	Harris Teeter	6	\$255.10	4.58%	6	\$253.90	4.64%
8	Aldi	30	\$251.90	4.53%	30	\$239.40	4.38%
9	Food Lion	20	\$243.10	4.37%	20	\$238.60	4.36%
10	Amazon Groc. (Whole Foods)	5	\$198.30	3.56%	6	\$209.40	3.83%
		191	\$5,441.07	97.77%	191	\$5,344.53	97.68%

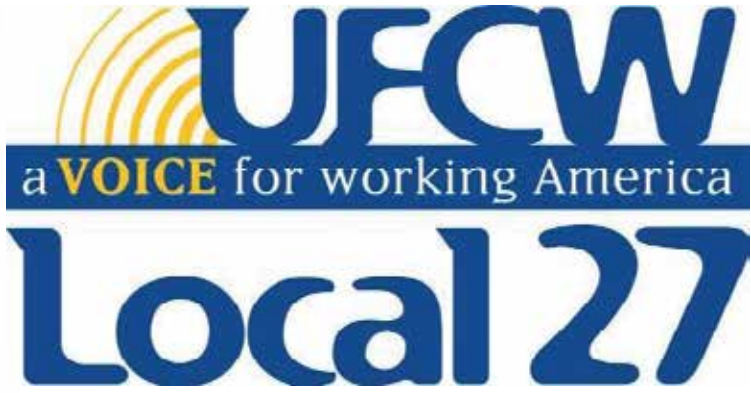
The chart above lists the top 10 supermarket retailers in the Baltimore market. Counties/cities included are: Anne Arundel, Baltimore City, Baltimore, Carroll, Harford, Howard and Queen Anne's. Petroleum sales are not included. () Indicates another banner used by the company.

Total supermarket sales for the area are \$5.57 billion.

Source: Food World, June 2026

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Baltimore Market Leaders

- Alts. Share Grows To 38.5%
- Giant Leads Against All Comers
- Walmart Strong Comps Noted
- C-Stores Grow Share To 9.7%
- Rite Aid Pulls Plug

Rank	Company	2026 Stores	2026 Sales (in millions)	% of 2026 Market	2025 Stores	2025 Sales (in millions)	% of 2025 Market
1	Giant Food	41	\$1,905.10	16.71%	41	\$1,863.60	16.56%
2	Walmart (SuperCenter)	21	\$911.80	8.00%	21	\$878.10	7.80%
3	Albertsons (Acme/Safeway)	27	\$811.60	7.12%	27	\$809.50	7.19%
4	Weis Markets	25	\$568.07	4.98%	25	\$557.93	4.96%
5	Wegmans	5	\$494.20	4.33%	5	\$485.00	4.31%
6	CVS	75	\$490.40	4.30%	81	\$491.70	4.37%
7	Royal Farm Stores	141	\$462.50	4.06%	139	\$432.00	3.84%
8	Walgreens	69	\$462.50	4.06%	73	\$436.50	3.88%
9	Target	19	\$392.90	3.45%	19	\$382.90	3.40%
10	7-Eleven	156	\$388.70	3.41%	163	\$398.70	3.54%
11	ShopRite (Klein's/Village/PR)	10	\$383.10	3.36%	10	\$372.50	3.31%
12	Costco	5	\$366.20	3.21%	5	\$346.20	3.08%
13	Sam's Club	6	\$349.70	3.07%	6	\$337.30	3.00%
14	International Markets	22	\$330.60	2.90%	21	\$314.70	2.80%
15	BJ's Wholesale Club	7	\$313.20	2.75%	7	\$303.80	2.70%
16	Harris Teeter	6	\$255.10	2.24%	6	\$253.90	2.26%
17	Aldi	30	\$251.90	2.21%	30	\$239.40	2.13%
18	Wawa	33	\$249.60	2.19%	32	\$241.49	2.15%
19	Food Lion	20	\$243.10	2.13%	20	\$238.60	2.12%
20	Amazon Groc. (Whole Foods)	5	\$198.30	1.74%	6	\$209.40	1.86%
		723	\$9,828.57	86.20%	737	\$9,593.22	85.26%

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 88. 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 \$11.4 billion.** Source: *Food World*, June 2026



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Baltimore-Washington Supermarket Leaders

- Giant Controls 29.9% Of B-W
- Safeway Still #2, Share Dips
- New Store Aids Wegmans
- Aldi Continues Going Strong
- TJ's Adds 3, Posts Solid IDs

Rank	Company	2026 Stores	2026 Sales (in millions)	% of 2026 Market	2025 Stores	2025 Sales (in millions)	% of 2025 Market
1	Giant Food	154	\$6,325.00	29.91%	153	\$6,205.10	30.06%
2	Albertsons (Acme/Balducci's/Safeway)	112	\$3,236.90	15.31%	113	\$3,224.90	15.62%
3	International Markets	135	\$2,218.10	10.49%	130	\$2,140.80	10.37%
4	Wegmans	21	\$2,126.00	10.05%	20	\$2,007.70	9.73%
5	Harris Teeter	45	\$1,699.90	8.04%	49	\$1,809.60	8.77%
6	Amazon Groc. (WFM/Daily Shop)	33	\$1,411.70	6.68%	39	\$1,414.00	6.85%
7	Weis Markets	53	\$1,075.95	5.09%	49	\$957.22	4.64%
8	Aldi	90	\$896.40	4.24%	87	\$830.20	4.02%
9	Trader Joe's	29	\$872.60	4.13%	26	\$758.70	3.68%
10	Food Lion	52	\$698.50	3.30%	52	\$704.70	3.41%
		724	\$20,561.05	97.23%	718	\$20,052.92	97.14%

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 \$21.15 billion.** Source: Food World, June 2026

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Baltimore-Washington Market Leaders

- Alts. Share Up To 35.1%
- Giant Remains Dominant
- CVS, Wlg. Gain On RA Exit
- No New Stores, But WM Up
- Sayonara To Amazon Fresh

Rank	Company	2026 Stores	2026 Sales (in millions)	% of 2026 Market	2025 Stores	2025 Sales (in millions)	% of 2025 Market
1	Giant Food	154	\$6,325.00	16.69%	153	\$6,205.10	16.75%
2	Albertsons (Acme/Balducci's/Safeway)	112	\$3,236.90	8.54%	113	\$3,224.90	8.71%
3	Walmart (SuperCenter)	60	\$2,436.80	6.43%	60	\$2,368.30	6.39%
4	International Markets	135	\$2,218.10	5.85%	130	\$2,140.80	5.78%
5	CVS	313	\$2,163.20	5.71%	325	\$2,135.90	5.77%
6	Wegmans	21	\$2,126.00	5.61%	20	\$2,007.70	5.42%
7	Costco	22	\$1,838.70	4.85%	22	\$1,747.80	4.72%
8	7-Eleven	675	\$1,808.60	4.77%	680	\$1,758.40	4.75%
9	Harris Teeter	45	\$1,699.90	4.48%	49	\$1,809.60	4.89%
10	Target (Super Target)	68	\$1,519.20	4.01%	67	\$1,451.40	3.92%
11	Amazon Groc. (WFM/Daily Shop)	33	\$1,411.70	3.72%	39	\$1,414.00	3.82%
12	Weis Markets	53	\$1,075.95	2.84%	49	\$957.22	2.58%
13	Walgreens	156	\$1,069.10	2.82%	166	\$1,055.50	2.85%
14	Aldi	90	\$896.40	2.36%	87	\$830.20	2.24%
15	Trader Joe's	29	\$872.60	2.30%	26	\$758.70	2.05%
16	BJ's Wholesale Club	16	\$706.10	1.86%	16	\$684.90	1.85%
17	Food Lion	52	\$698.50	1.84%	52	\$704.70	1.90%
18	Wawa	89	\$622.30	1.64%	88	\$607.04	1.64%
19	Royal Farm Stores	171	\$593.10	1.56%	167	\$546.70	1.48%
20	Sam's Club	11	\$554.30	1.46%	11	\$537.40	1.45%
		2,305	\$33,872.45	89.37%	2,320	\$32,946.26	88.94%

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 88. 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 \$37.9 billion.** Source: Food World, June 2026



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Claire Peters Named To Replace JJ Fleeman As ADUSA Chief Executive Officer

from page 1

at an extraordinary general meeting of shareholders to be held later this year, as well as customary regulatory approval.

She will replace JJ Fleeman, who announced in March that he has accepted an offer to become CEO of Dollar General next January. Fleeman will leave his post at the end of this month. He served ADUSA as CEO since April 2023, replacing Kevin Holt who retired.

A native of Wales, Peters is an experienced retail leader with three decades of expertise in grocery, consumer and retail businesses across international markets. Most recently, from 2023-2025, she served as VP-Worldwide Fresh at Amazon, where she directed a global grocery portfolio across six countries.

Prior to that, she held executive

positions at Woolworths Group in Australia and held several leadership roles at Tesco (where she began her grocery career and remained for 21 years), both in the United Kingdom and as chief operating officer for Tesco in Thailand. Throughout her 30-year career in retail, she led large businesses across food, wholesale and e-commerce.

Frans Muller, president and CEO of Ahold Delhaize, said: "Claire brings strong operational leadership and deep experience in omnichannel grocery and business transformation. She has led businesses of significant scale across several markets, with full accountability for performance, customer proposition and execution. Her combination of strategic insight, customer focus and people-first leadership makes her very well positioned to lead Ahold Delhaize



Claire Peters

USA into its next chapter. I look forward to welcoming Claire to the team and working closely with her as we continue to build on the exceptional leadership strength of our brands in the U.S."

Peters' experience spans four continents and she is well

known for building high-performing teams, driving technology transformation and delivering market share growth by growing customer trust. In addition to her executive experience, she has held a series of non-executive board positions in food retail. She holds a bachelor of science degree in sociology and economics from the University of Loughborough.

Wiebe Draijer, chair of the supervisory board of Ahold Delhaize, said: "We are pleased to nominate Claire as CEO of Ahold Delhaize USA and member of the Management Board. Claire is a highly accomplished retail leader with deep operational and digital expertise, broad experience across grocery and consumer businesses, and a strong record of delivering results in complex environments. She has led large, customer-

focused organizations through transformation while building cultures of clarity, trust and accountability. We are confident that Claire's leadership will further strengthen Ahold Delhaize USA and support the continued execution of our Growing Together strategy."

Peters said: "I am honored by the nomination to serve as CEO of Ahold Delhaize USA. Ahold Delhaize's family of local brands combines strong heritage, deep community roots and a clear commitment to serving customers with excellence every day. I look forward to working with teams across the U.S. businesses to build on that strength, further enhance the customer experience, accelerate omnichannel growth, grow own-brand assortment, and continue delivering sustainable value for customers, associates and shareholders."

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**Contact Ginny Williams,
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IN REVIEW: WALMART

State	County	2026 Stores	2026 Sales (in millions)	2026 County Food Sales	% of 2026 County Market	2025 Stores	2025 Sales (in millions)	% of 2025 County Market
DC	Washington (SuperCenter)	2	\$56.10	\$2,804.20	2.00%	2	\$54.30	1.99%
DC Recap: 2 stores with sales of \$56.1 million. Total retail food sales for DC in the study: \$2.8 billion. Walmart share of DC is 2.0%.								
DE	Kent (SuperCenter)	2	\$71.90	\$585.40	12.28%	2	\$71.20	12.39%
DE	Sussex (SuperCenter)	4	\$156.50	\$1,128.50	13.87%	4	\$151.20	13.57%
DE Recap: 6 stores with sales of \$228.4 million. Total retail food sales for DE in the study: \$1.71 billion. Walmart share of DE is 13.33%.								
MD	Anne Arundel (SuperCenter)	4	\$187.40	\$2,635.90	7.11%	4	\$180.50	7.10%
MD	Baltimore County (SuperCenter)	8	\$399.20	\$3,814.40	10.47%	8	\$383.40	10.16%
MD	Calvert (SuperCenter)	2	\$64.80	\$486.70	13.31%	2	\$70.80	15.74%
MD	Caroline (SuperCenter)	1	\$46.60	\$120.80	38.58%	1	\$45.80	41.04%
MD	Carroll (SuperCenter)	4	\$129.20	\$755.90	17.09%	4	\$124.70	16.42%
MD	Cecil (SuperCenter)	2	\$66.80	\$331.90	20.13%	2	\$66.20	20.29%
MD	Charles (SuperCenter)	2	\$84.60	\$669.20	12.64%	2	\$84.10	13.13%
MD	Dorchester (SuperCenter)	1	\$31.70	\$73.70	43.01%	1	\$31.10	43.19%
MD	Frederick (SuperCenter)	2	\$133.90	\$1,120.20	11.95%	2	\$130.50	12.18%
MD	Harford (SuperCenter)	3	\$112.80	\$1,222.50	9.23%	3	\$108.20	9.39%
MD	Howard (SuperCenter)	2	\$83.20	\$1,353.20	6.15%	2	\$81.30	6.08%
MD	Montgomery (SuperCenter)	1	\$44.10	\$4,304.80	1.02%	1	\$43.50	1.04%
MD	Prince George's (SuperCenter)	4	\$107.60	\$3,719.30	2.89%	4	\$103.20	2.81%
MD	St. Mary's (SuperCenter)	1	\$63.70	\$410.10	15.53%	1	\$66.10	16.51%
MD	Talbot	1	\$26.20	\$237.30	11.04%	1	\$25.80	10.90%
MD	Washington (SuperCenter)	2	\$138.10	\$634.60	21.76%	2	\$132.40	21.79%
MD	Wicomico (SuperCenter)	2	\$86.90	\$325.90	26.66%	2	\$86.20	26.30%
MD	Worcester (SuperCenter)	2	\$92.10	\$259.60	35.48%	2	\$89.40	34.56%
MD Recap: 44 stores with sales of \$1.9 billion. Total retail food sales for MD in the study: \$24.54 billion. Walmart share of MD is 7.83%.								
PA	Adams	1	\$26.90	\$231.20	11.63%	1	\$25.80	11.21%
PA	Cumberland (SuperCenter)	4	\$129.80	\$1,300.10	9.98%	4	\$137.50	10.66%
PA	Dauphin (SuperCenter)	2	\$95.40	\$1,118.70	8.53%	2	\$92.10	8.12%
PA	Franklin (SuperCenter)	2	\$99.20	\$546.80	18.14%	2	\$94.30	17.60%
PA	Lancaster (SuperCenter)	3	\$168.80	\$1,883.20	8.96%	3	\$160.70	8.69%
PA	Lebanon (SuperCenter)	2	\$104.20	\$489.20	21.30%	2	\$100.40	21.13%
PA	York (SuperCenter)	6	\$267.30	\$1,826.80	14.63%	6	\$254.20	14.26%
PA Recap: 20 stores with sales of \$891.6 million. Total retail food sales for PA in the study: \$7.52 billion. Walmart share of PA is 11.86%.								
VA	Accomack	1	\$45.20	\$110.60	40.87%	1	\$43.80	40.82%
VA	Albemarle (SuperCenter)	1	\$44.70	\$755.10	5.92%	1	\$44.00	5.91%
VA	Chesapeake City (SuperCenter)	6	\$202.10	\$1,003.20	20.15%	6	\$195.20	19.56%
VA	Chesterfield (SuperCenter)	6	\$286.50	\$1,814.30	15.79%	6	\$273.60	15.52%
VA	Culpeper (SuperCenter)	1	\$38.90	\$197.40	19.71%	1	\$37.70	19.53%
VA	Dinwiddie (SuperCenter)	1	\$52.50	\$142.60	36.82%	1	\$50.30	34.57%
VA	Essex (SuperCenter)	1	\$48.90	\$76.70	63.75%	1	\$48.10	60.35%
VA	Fairfax (SuperCenter)	8	\$293.40	\$6,579.20	4.46%	8	\$285.20	4.49%
VA	Fauquier (SuperCenter)	1	\$43.20	\$216.80	19.93%	1	\$41.90	19.69%
VA	Frederick (SuperCenter)	3	\$189.40	\$583.90	32.44%	3	\$179.30	31.92%
VA	Gloucester (SuperCenter)	1	\$43.40	\$136.10	31.89%	1	\$42.50	30.77%
VA	Hampton/Nwprt News (SC/Nghbrhd Mkt)	5	\$193.80	\$1,337.30	14.49%	5	\$184.10	13.80%
VA	Hanover (SC/Neighborhood Mkt)	3	\$130.10	\$559.70	23.24%	3	\$124.70	22.90%
VA	Henrico (SuperCenter)	6	\$333.20	\$2,149.30	15.50%	6	\$319.90	15.21%
VA	James City (SuperCenter)	2	\$86.60	\$443.80	19.51%	2	\$83.10	18.92%
VA	King George (SuperCenter)	1	\$42.30	\$113.10	37.40%	1	\$41.70	38.05%
VA	Lancaster (SuperCenter)	1	\$44.20	\$79.10	55.88%	1	\$43.10	54.97%

IN REVIEW: WALMART

State	County	2026 Stores	2026 Sales (in millions)	2026 County Food Sales	% of 2026 County Market	2025 Stores	2025 Sales (in millions)	% of 2025 County Market
VA	Loudoun (SuperCenter)	3	\$144.60	\$1,802.60	8.02%	3	\$143.50	8.20%
VA	Norfolk City (SC/Neighborhood Mkt)	4	\$196.50	\$899.50	21.85%	4	\$188.70	21.53%
VA	Nottoway (SuperCenter)	1	\$40.80	\$44.60	91.48%	1	\$39.80	92.77%
VA	Orange (SuperCenter)	2	\$78.00	\$155.80	50.06%	2	\$77.10	50.13%
VA	Page (SuperCenter)	1	\$48.70	\$81.80	59.54%	1	\$47.80	61.36%
VA	Portsmouth City (SuperCenter)	1	\$37.00	\$323.60	11.43%	1	\$35.90	11.74%
VA	Powhatan (SuperCenter)	1	\$45.10	\$86.00	52.44%	1	\$44.30	52.43%
VA	Prince William (SuperCenter)	5	\$153.20	\$2,278.50	6.72%	5	\$147.60	6.64%
VA	Shenandoah (SuperCenter)	1	\$42.90	\$132.10	32.48%	1	\$42.10	32.43%
VA	Southampton (SuperCenter)	1	\$50.40	\$89.80	56.12%	1	\$49.70	55.10%
VA	Spotsylvania (SuperCenter)	4	\$191.20	\$900.30	21.24%	4	\$181.70	20.66%
VA	Stafford (SuperCenter)	2	\$77.20	\$509.70	15.15%	2	\$75.60	15.45%
VA	Suffolk City (SuperCenter)	2	\$87.10	\$369.70	23.56%	2	\$85.00	24.00%
VA	Virginia Beach (SC/Neighborhood Mkt)	7	\$284.80	\$1,976.80	14.41%	7	\$272.30	14.52%
VA	Warren (SuperCenter)	1	\$49.90	\$185.20	26.94%	1	\$48.90	27.60%
VA	York (SuperCenter)	1	\$49.10	\$202.60	24.23%	1	\$48.10	24.10%

VA Recap: 85 stores with sales of \$3.69 billion. Total retail food sales for VA in the study: \$29.09 billion. Walmart share of VA is 13.15%.

Mid-Atlantic Recap: 157 stores with sales of \$6.77 billion annually. Mid-Atlantic retail food sales total: \$64.4 billion.

Walmart Per Store Average: \$43.12 million () Name in parentheses indicates another banner used by the company.

Source: Food World, June 2026



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IN REVIEW: GIANT FOOD

State	County	2026 Stores	2026 Sales (in millions)	2026 County Food Sales	% of 2026 County Market	2025 Stores	2025 Sales (in millions)	% of 2025 County Market
DC	Washington	7	\$311.40	\$2,804.20	11.10%	7	\$306.20	11.25%
DC Recap: 7 stores with sales of \$311.4 million. Total retail food sales for DC in the study: \$2.8 billion. Giant Food share of DC is 11.1%.								
DE	Sussex	3	\$185.20	\$1,128.50	16.41%	3	\$181.70	16.30%
DE Recap: 3 stores with sales of \$185.2 million. Total retail food sales for DE in the study: \$1.71 billion. Giant Food share of DE is 10.81%.								
MD	Anne Arundel	9	\$471.90	\$2,635.90	17.90%	9	\$460.30	18.11%
MD	Baltimore City	7	\$351.70	\$1,450.60	24.25%	7	\$345.00	22.69%
MD	Baltimore County	15	\$644.80	\$3,814.40	16.90%	15	\$633.40	16.79%
MD	Calvert	3	\$148.30	\$486.70	30.47%	3	\$160.80	35.75%
MD	Carroll	1	\$44.10	\$755.90	5.83%	1	\$43.70	5.76%
MD	Charles	2	\$88.70	\$669.20	13.25%	2	\$91.50	14.29%
MD	Frederick	3	\$137.20	\$1,120.20	12.25%	3	\$133.80	12.48%
MD	Harford	2	\$88.20	\$1,222.50	7.21%	2	\$84.70	7.35%
MD	Howard	7	\$304.40	\$1,353.20	22.49%	7	\$296.50	22.18%
MD	Montgomery	26	\$1,073.20	\$4,304.80	24.93%	26	\$1,079.20	25.76%
MD	Prince George's	18	\$696.30	\$3,719.30	18.72%	17	\$644.30	17.57%
MD	St. Mary's	1	\$36.50	\$410.10	8.90%	1	\$39.60	9.89%
MD	Talbot	1	\$40.80	\$237.30	17.19%	1	\$40.20	16.99%
MD Recap: 95 stores with sales of \$4.13 billion. Total retail food sales for MD in the study: \$24.54 billion. Giant Food share of MD is 17.01%.								
VA	Albemarle	1	\$37.60	\$755.10	4.98%	1	\$37.50	5.03%
VA	Arlington	3	\$105.10	\$1,004.20	10.47%	3	\$103.20	9.96%
VA	Fairfax	29	\$1,096.30	\$6,579.20	16.66%	29	\$1,076.50	16.94%
VA	Fauquier	1	\$34.30	\$216.80	15.82%	1	\$33.90	15.93%
VA	Loudoun	8	\$266.70	\$1,802.60	14.80%	8	\$259.10	14.80%
VA	Prince William	8	\$233.50	\$2,278.50	10.25%	8	\$228.70	10.29%
VA	Spotsylvania	2	\$95.80	\$900.30	10.64%	2	\$94.60	10.75%
VA	Stafford	3	\$133.10	\$509.70	26.11%	3	\$129.70	26.51%

VA Recap: 55 stores with sales of \$2.0 billion. Total retail food sales for VA in the study: \$29.09 billion. Giant Food share of VA is 7.13%.

Mid-Atlantic Recap: 160 stores with sales of \$6.63 billion annually. Mid-Atlantic retail food sales total: \$64.4 billion.

Giant Food Per Store Average: \$41.4 million

Source: Food World, June 2026

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IN REVIEW: HARRIS TEETER

State	County	2026 Stores	2026 Sales (in millions)	2026 County Food Sales	% of 2026 County Market	2025 Stores	2025 Sales (in millions)	% of 2025 County Market
DC	Washington	3	\$176.20	\$2,804.20	6.28%	3	\$173.40	6.37%
DC Recap: 3 stores with sales of \$176.2 million. Total retail food sales for DC in the study: \$2.8 billion. Harris Teeter share of DC is 6.28%.								
DE	Sussex	2	\$39.50	\$1,128.50	3.50%	2	\$39.20	3.52%
DE Recap: 2 stores with sales of \$39.5 million. Total retail food sales for DE in the study: \$1.71 billion. Harris Teeter share of DE is 2.3%.								
MD	Anne Arundel	1	\$38.60	\$2,635.90	1.46%	1	\$38.40	1.51%
MD	Baltimore City	2	\$88.30	\$1,450.60	6.09%	2	\$88.10	5.79%
MD	Calvert	1	\$18.70	\$486.70	3.84%	1	\$23.80	5.29%
MD	Howard	3	\$128.20	\$1,353.20	9.47%	3	\$127.40	9.53%
MD	Montgomery	6	\$179.30	\$4,304.80	4.17%	7	\$202.60	4.84%
MD	Prince George's	2	\$42.90	\$3,719.30	1.15%	2	\$42.70	1.16%
MD	St. Mary's	1	\$26.50	\$410.10	6.46%	1	\$31.70	7.92%
MD	Talbot	1	\$29.20	\$237.30	12.31%	1	\$28.60	12.09%
MD Recap: 17 stores with sales of \$551.7 million. Total retail food sales for MD in the study: \$24.54 billion. Harris Teeter share of MD is 2.27%.								
VA	Albemarle	3	\$79.80	\$755.10	10.57%	3	\$78.10	10.48%
VA	Arlington	4	\$232.50	\$1,004.20	23.15%	6	\$291.40	28.11%
VA	Chesapeake City	3	\$81.50	\$1,003.20	8.12%	3	\$80.60	8.08%
VA	Fairfax	9	\$378.20	\$6,579.20	5.75%	10	\$407.40	6.41%
VA	Fauquier	1	\$20.80	\$216.80	9.59%	1	\$20.50	9.63%
VA	Hampton/Newport News	2	\$44.10	\$1,337.30	3.30%	2	\$43.70	3.28%
VA	James City	3	\$115.20	\$443.80	25.96%	3	\$112.00	25.50%
VA	Loudoun	9	\$255.70	\$1,802.60	14.19%	9	\$252.30	14.41%
VA	Norfolk City	3	\$74.80	\$899.50	8.32%	3	\$73.90	8.43%
VA	Portsmouth City	1	\$26.20	\$323.60	8.10%	1	\$26.20	8.57%
VA	Prince William	4	\$140.50	\$2,278.50	6.17%	4	\$141.60	6.37%
VA	Suffolk City	1	\$29.40	\$369.70	7.95%	1	\$29.10	8.22%
VA	Virginia Beach	9	\$214.20	\$1,976.80	10.84%	9	\$206.20	11.00%
VA Recap: 52 stores with sales of \$1.69 billion. Total retail food sales for VA in the study: \$29.09 billion. Harris Teeter share of VA is 6.03%.								

Mid-Atlantic Recap: 74 stores with sales of \$2.46 billion annually. Mid-Atlantic retail food sales total: \$64.4 billion.

Harris Teeter Per Store Average: \$33.25 million

Source: Food World, June 2026

From the Desk Of The Executive Editor

from page 4

What Are The Costs Of ESLs?

None of this is to suggest that electronic shelf labels are without challenges. Major infrastructure investments rarely are.

Implementation costs remain significant for retailers. Return-on-investment calculations vary by chain size, labor costs, store format, and even existing technology infrastructure. Not every retailer will arrive at the same answer.

The grocery industry operates on some of the thinnest margins in the economy. For many retailers, deploying ESLs across hundreds of stores represents a significant capital commitment that must compete with other priorities, including supply chain investments, store remodels, cybersecurity initiatives, labor retention programs, and digital commerce capabilities.

And let's face it: The current cost per ESL tag is currently higher than it should be. Additionally, there are software licenses, base stations, installation, and setups costs; plus on-

going expenses like battery replacement to consider. There is also the real issue of vendor dependency.

As stores become increasingly connected, retailers must carefully evaluate technology partners, interoperability standards, and long-term support requirements. The grocery industry has experienced enough technology cycles to know that flexibility counts for a lot. Systems that appear innovative today can become constraints tomorrow if they limit integration, scalability, or future innovation.

The ROI calculation must make sense.

Retailers should resist the temptation to view ESL adoption as a technology project and instead evaluate it as a long-term operating model and infrastructure decision. The most successful implementations will likely occur where shelf-edge technology is integrated into broader merchandising, pricing, inventory, and customer engagement strategies.

The question is not whether electronic shelf labels can save on labor; most will. The more important – and exciting – question is what

becomes possible once every shelf in the store becomes digitally connected. That answer may ultimately prove far more valuable than the labor savings that justified the investment in the first place.

When Uber was first introduced to investors, they ran the numbers and found that the existing taxi market wasn't big enough to justify the investment. Mark Cuban and Gary Vaynerchuk famously passed on it. What they failed to realize was that Uber, LYFT and others like it didn't just replace the existing taxis, they expanded the global market for individuals to use the product.

The data streams coming out of a fully connected store – including and especially inventory tracking – will absolutely have the same level of transformative power for the industry.

In Defense Of Tech Upgrades Like ESLs

There is a growing sense of unease surrounding the long-term implications of artificial intelligence. Not the AI tools most people interact with today, which are largely sophisticated assistants and productivity enhancers, but the pros-

pect of increasingly autonomous systems that could fundamentally reshape labor markets, economic structures, and society itself.

Whether those fears ultimately prove justified is almost beside the point. The perception of disruption is real, and as AI capabilities continue to advance, more people are beginning to question what their role will be in the economy of the future.

Layer onto that concerns about surveillance technologies and the expanding use of consumer data to influence pricing, promotions, and shopping experiences and it's no wonder people are scared.

Arizona, Rhode Island and Maine are just a handful of states with bills looking to restrict or ban ESLs entirely. Federal legislation against ESLs has been proposed but has not seen the advancement that state laws have.

If consumers begin to believe that technology is creating different economic outcomes for different groups of people – or that access to affordable food is increasingly determined by algorithms rather than transparent market forces – the issue quickly moves beyond retail innovation and into the realm of

public policy.

At that point, the conversation is no longer about technology adoption.

It becomes a question of trust. And when trust erodes, regulatory scrutiny and political intervention are rarely far behind. Retailers, technology providers, and policymakers would be wise to recognize that the public's acceptance of these innovations will depend not only on what the technology can do, but on whether consumers believe it is being deployed fairly, transparently, and in their best interests.

Electronic shelf labels are the newest tool that grocery retailers can use to increase agility and profitability. But they are so much more, and we need to defend their use. While the technology may enable more dynamic pricing capabilities, retailers should be thoughtful about how those capabilities are deployed.

As an industry, we need to get better at how we roll out new technology features – and have open discussions with our customers about their use and purpose. Because if we don't control the narrative, someone else is going to do it for us.



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IN REVIEW: COSTCO

State	County	2026 Stores	2026 Sales (in millions)	2026 County Food Sales	% of 2026 County Market	2025 Stores	2025 Sales (in millions)	% of 2025 County Market
DC	Washington	1	\$80.30	\$2,804.20	2.86%	1	\$76.70	2.82%
DC Recap: 1 store with sales of \$80.3 million. Total retail food sales for DC in the study: \$2.8 billion. Costco share of DC is 2.86%.								
MD	Anne Arundel	2	\$142.10	\$2,635.90	5.39%	2	\$135.70	5.34%
MD	Baltimore County	2	\$151.60	\$3,814.40	3.97%	2	\$142.30	3.77%
MD	Frederick	1	\$65.00	\$1,120.20	5.80%	1	\$61.70	5.76%
MD	Howard	1	\$72.50	\$1,353.20	5.36%	1	\$68.20	5.10%
MD	Montgomery	2	\$212.80	\$4,304.80	4.94%	2	\$203.40	4.86%
MD	Prince George's	3	\$215.20	\$3,719.30	5.79%	3	\$206.80	5.64%
MD Recap: 11 stores with sales of \$859.2 million. Total retail food sales for MD in the study: \$24.54 billion. Costco share of MD is 3.54%.								
PA	Cumberland	1	\$48.20	\$1,300.10	3.71%	0	\$0.00	0.00%
PA	Dauphin	1	\$63.00	\$1,118.70	5.63%	1	\$60.10	5.30%
PA	Lancaster	1	\$39.20	\$1,883.20	2.08%	1	\$36.70	1.98%
PA Recap: 3 stores with sales of \$150.4 million. Total retail food sales for PA in the study: \$7.52 billion. Costco share of PA is 2.0%.								
VA	Albemarle	1	\$47.10	\$755.10	6.24%	1	\$45.10	6.05%
VA	Arlington	1	\$86.20	\$1,004.20	8.58%	1	\$82.00	7.91%
VA	Chesterfield	1	\$53.60	\$1,814.30	2.95%	1	\$51.20	2.91%
VA	Fairfax	4	\$467.30	\$6,579.20	7.10%	4	\$441.60	6.95%
VA	Frederick	1	\$66.20	\$583.90	11.34%	1	\$62.90	11.20%
VA	Hampton/Newport News	1	\$44.90	\$1,337.30	3.36%	1	\$43.80	3.28%
VA	Henrico	1	\$54.90	\$2,149.30	2.55%	1	\$53.20	2.53%
VA	Loudoun	2	\$200.30	\$1,802.60	11.11%	2	\$191.70	10.95%
VA	Norfolk City	1	\$55.80	\$899.50	6.20%	1	\$53.50	6.11%
VA	Prince William	2	\$104.20	\$2,278.50	4.57%	2	\$99.10	4.46%
VA	Spotsylvania	1	\$41.20	\$900.30	4.58%	1	\$38.60	4.39%
VA Recap: 16 stores with sales of \$1.22 billion. Total retail food sales for VA in the study: \$29.09 billion. Costco share of VA is 4.35%.								

Mid-Atlantic Recap: 21 stores with sales of \$2.31 billion annually. Mid-Atlantic retail food sales total: \$64.4 billion.

Costco Per Store Average: \$74.57 million

Source: Food World, June 2026



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JOH Hosts Dinner Party At Epcot Center During 2026 IDDBA Dairy-Deli-Bake Show



As industry members gathered in Orlando for this year's IDDBA show, JOH hosted a dinner party at Epcot Center for its partners. This photo from the evening includes Allan Perkins of JOH, Jen Harper and Katelyn Mertz of Redner's Markets, and Chris Darmody of JOH.



These folks are Anne Rakosky, Brian LaMarche and Joe Navitsky of JOH, Amanda Kembel and Nina Euele of BJ's Wholesale Markets, and Chris Darmody of JOH.



Joe Navitsky (l) and Allan Perkins (r) of JOH smile for a photo with The Giant Company's Taneya Clark and Nancy Wingfield.



Peter Poutre (c) of JOH is flanked in this photo by Tom La-Rochelle and Randy Sweeney of Lactalis American Group.



Allan Perkins (l) and Chris Darmody (r) of JOH pose for a photo with Seth Brody of Pretzelized.



Michelle Halloran (2nd from l) of Stop & Shop is joined here by Chris Darmody, Stephanie Wrocklage and Allan Perkins of JOH.

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NEW SUPERMARKET, CLUB STORE & MASS MERCHANT OPENINGS

in the Food World Area

New or replacement stores likely to open in the next 36 months

Retailer	Number	Location
Albertsons	1	Ocean City, MD (r)
Aldi	6	Seaford, DE; Baltimore, MD (Edmonson Ave.); Lancaster, PA; Mt. Joy, PA; Tysons Corner, VA; Winchester, VA
BJ's Wholesale Club	1	Towson, MD
Costco	3	Bel Air, MD; Silver Spring, MD (r); Newport News, VA (r)
The Fresh Market	2	Falls Church, VA; Reston, VA
Giant Food	1	Berlin, MD
Harris Teeter	1	N. Stafford, VA
Kroger	1	Mechanicsville, VA (r)*
Lidl	7	Wilmington, DE; Baltimore, MD (3 - Orleans St., Belair Rd., Eastern Ave.); District Heights, MD*; Rockville, MD; Falls Church, VA
MOM's Organic Market	1	Springfield, VA
Publix	4	Manassas, VA; Stephens City, VA; Winchester, VA; Yorktown, VA
Redner's Markets	1	Wilmington, DE
Sprouts	10	Washington, DC (2 - N. Capitol St., E. St.); Bear, DE; Gaithersburg, MD; Odenton, MD; Middle River, MD; Upper Marlboro, MD; Rockville, MD; Arlington, VA; Dumfries, MD
Target	1	Norfolk, VA
Wegmans	2	Charlotte, NC; Cranberry Twp., PA
Weis Markets	2	Millsboro, DE; Clarksburg, MD
Whole Foods	3	Bel Air, MD; Silver Spring, MD (White Oak); Midlothian, VA

(r) replacement store

*store opened between 4/1/2026 - 6/30/2026

Source: *Food World*, June 2026



Leading the Baking Aisle with Trusted Brands

MARYLAND COUNTY SHARE OF MARKET: 2026

Total sales for those Maryland counties included in the study are \$24.25 billion

Rank	Company	Stores	Sales (in millions)	% of Market
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ANNE ARUNDEL COUNTY (\$2.6 billion) (Includes Annapolis, Brooklyn Park, Glen Burnie, Linthicum)

- Population 603,380
- # of Households 224,748
- Median Income \$124,911
- Under 18 22.1%
- Over 65 16.8%
- Female 50.4%
- White 61.65%
- Black 19.4%
- Hispanic 11.3%
- Asian 4.7%

1	Giant Food	9	\$471.90	17.9%
2	Albertsons (Safeway)	8	\$249.60	9.47%
3	Walmart (SuperCenter)	4	\$187.40	7.11%
4	Costco	2	\$142.10	5.39%
5	CVS	22	\$134.10	5.09%
6	Sam's Club	3	\$122.30	4.64%
7	Military Commissaries	2	\$116.47	4.42%
8	Target	5	\$113.80	4.32%
9	Wegmans	1	\$95.80	3.63%
10	7-Eleven	40	\$92.70	3.52%
11	Food Lion	5	\$73.30	2.78%
12	Aldi	7	\$72.20	2.74%
13	Shoppers	2	\$70.10	2.66%
14	Walgreens	15	\$66.70	2.53%
15	Wawa	8	\$61.20	2.32%
16	Royal Farm Stores	21	\$57.60	2.19%
17	B. Green (Green Valley)	3	\$53.00	2.01%
18	Weis Markets	3	\$52.58	1.99%
19	Amazon Groc. (Whole Foods)	1	\$51.60	1.96%
20	BJ's Wholesale Club	1	\$49.90	1.89%
21	Harris Teeter	1	\$38.60	1.46%
22	The Fresh Market	2	\$37.10	1.41%
23	International Markets	2	\$34.80	1.32%
24	Trader Joe's	1	\$23.10	0.88%
25	Geresbeck's Food Market	2	\$22.40	0.85%
26	Graul's	2	\$22.30	0.85%
27	Sprouts	1	\$19.20	0.73%
28	C&S Independents	8	\$19.10	0.72%
29	Dash-In	10	\$17.90	0.68%
30	Lidl	2	\$15.90	0.6%
31	MOM's Organic Market	1	\$14.80	0.56%
32	High's	7	\$13.60	0.52%
33	Grocery Outlet	1	\$6.10	0.23%
34	Save A Lot	1	\$4.20	0.16%
		203	\$2,623.45	99.53%



BALTIMORE CITY (\$1.5 billion)

- Population 569,997
- # of Households 255,668
- Median Income \$62,177
- Under 18 20.8%
- Over 65 16.1%
- Female 53.7%
- White 26.89%
- Black 59.25%
- Hispanic 8.0%
- Asian 2.6%

1	Giant Food	7	\$351.70	24.25%
2	Walgreens	12	\$101.70	7.01%
3	Albertsons (Safeway)	3	\$91.20	6.29%
4	Harris Teeter	2	\$88.30	6.09%
5	7-Eleven	34	\$81.70	5.63%
6	Save A Lot	8	\$81.60	5.63%
7	International Markets	8	\$75.60	5.21%
8	Royal Farm Stores	24	\$73.40	5.06%
9	CVS	8	\$69.70	4.8%
10	Amazon Groc. (Whole Foods)	2	\$66.70	4.6%
11	BJ's Wholesale Club	1	\$39.50	2.72%
12	Shoppers	2	\$38.50	2.65%
13	B. Green (Food Depot)	1	\$34.00	2.34%
14	Aldi	4	\$30.60	2.11%
15	ShopRite (Klein's)	1	\$28.10	1.94%
16	Target	1	\$23.20	1.6%
17	Sprouts	1	\$19.50	1.34%
18	Wawa	2	\$17.30	1.19%
19	Streets Market	2	\$17.20	1.19%
20	MOM's Organic Market	1	\$16.70	1.15%
21	Eddie's of Roland Park	1	\$12.10	0.83%
22	Lidl	1	\$11.70	0.81%
23	Circle K	2	\$4.60	0.32%
24	Dash-In	1	\$3.50	0.24%
		129	\$1,378.10	95%



BALTIMORE COUNTY (\$3.8 billion) (Includes Catonsville, Dundalk, Randallstown, Reisterstown)

- Population 852,425
- # of Households 330,151
- Median Income \$90,904
- Under 18 21.7%
- Over 65 18.7%
- Female 52.5%
- White 51.6%
- Black 32.2%
- Hispanic 8%
- Asian 6.5%

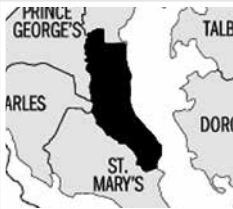
1	Giant Food	15	\$644.80	16.9%
2	Walmart (SuperCenter)	8	\$399.20	10.47%
3	Weis Markets	11	\$273.95	7.18%
4	Sam's Club	3	\$227.40	5.96%
5	Royal Farm Stores	64	\$224.30	5.88%
6	Wegmans	2	\$183.40	4.81%
7	Albertsons (Safeway)	7	\$180.30	4.73%

See MARYLAND COUNTY SHARE on page 43

MARYLAND COUNTY SHARE OF MARKET: 2026

Continued from page

8	Walgreens	23	\$175.40	4.6%
9	CVS	23	\$161.70	4.24%
10	International Markets	9	\$158.20	4.15%
11	Costco	2	\$151.60	3.97%
12	7-Eleven	45	\$123.80	3.25%
13	Target	6	\$116.10	3.04%
14	ShopRite (Klein's/Village)	3	\$96.80	2.54%
15	Aldi	12	\$94.10	2.47%
16	BJ's Wholesale Club	2	\$85.30	2.24%
17	Wawa	10	\$74.10	1.94%
18	Food Lion	6	\$64.60	1.69%
19	Lidl	5	\$40.90	1.07%
20	Trader Joe's	2	\$39.30	1.03%
21	Graul's	3	\$36.20	0.95%
22	MOM's Organic Market	2	\$35.10	0.92%
23	Amazon Groc. (Whole Foods)	1	\$34.90	0.91%
24	Shoppers	1	\$30.20	0.79%
25	Eddie's of Roland Park	1	\$29.80	0.78%
26	The Fresh Market	2	\$27.20	0.71%
27	Sprouts	1	\$22.20	0.58%
28	Redner's Markets (Cost Boss)	1	\$21.10	0.55%
29	High's	8	\$16.10	0.42%
30	Geresbeck's Food Market	1	\$13.40	0.35%
31	Save A Lot	2	\$5.90	0.15%
32	Circle K	2	\$5.70	0.15%
33	Key Food	1	\$5.35	0.14%
34	Sheetz	1	\$4.40	0.12%
35	C&S Independents	3	\$4.10	0.11%
36	Dash-In	1	\$3.40	0.09%
		289	\$3,810.30	99.89%




CALVERT COUNTY (\$486.7 million)
(Includes Dunkirk, Prince Frederick, Solomons)

- Population 94,484
- # of Households 33,676
- Median Income \$133,922
- Under 18 22.7%
- Over 65 17.5%
- Female 50.2%
- White 74.3%
- Black 14.7%
- Hispanic 5.6%
- Asian 2.2%

1	Giant Food	3	\$148.30	30.47%
2	Weis Markets	5	\$99.48	20.44%
3	Albertsons (Safeway)	2	\$72.70	14.94%
4	Walmart (SuperCenter)	2	\$64.80	13.31%
5	Wawa	2	\$18.80	3.86%


6	Harris Teeter	1	\$18.70	3.84%
7	7-Eleven	7	\$16.20	3.33%
8	CVS	3	\$15.30	3.14%
9	Walgreens	2	\$14.80	3.04%
10	Aldi	1	\$10.30	2.12%
11	Dash-In	2	\$5.10	1.05%
		30	\$484.48	99.54%



CAROLINE COUNTY (\$120.8 million)
(Includes Denton, Federalsburg, Greensboro)

- Population 34,116
- # of Households 12,495
- Median Income \$68,457
- Under 18 24.2%
- Over 65 18.3%
- Female 51.0%
- White 73.0%
- Black 13.8%
- Hispanic 10.3%
- Asian 1.4%

1	Walmart (SuperCenter)	1	\$46.60	38.58%
2	Food Lion	2	\$22.90	18.96%
3	Royal Farm Stores	4	\$13.30	11.01%
4	Aldi	1	\$11.10	9.19%
5	Walgreens	1	\$5.90	4.88%
6	7-Eleven	2	\$5.80	4.8%
7	Save A Lot	1	\$4.70	3.89%
8	Wawa	1	\$4.20	3.48%
9	Miller's	1	\$2.50	2.07%
10	Fas-Marts	1	\$2.20	1.82%
		15	\$119.20	98.68%



CARROLL COUNTY (\$755.9 million)
(Includes Eldersburg, Manchester, Taneytown, Westminster)

- Population 176,677
- # of Households 65,133
- Median Income \$130,300
- Under 18 22.0%
- Over 65 18.8%
- Female 50.4%
- White 85.85%
- Black 4.07%
- Hispanic 4.48%
- Asian 2.18%

1	Walmart (SuperCenter)	4	\$129.20	17.09%
2	Weis Markets	5	\$106.19	14.05%
3	Albertsons (Safeway)	3	\$104.80	13.86%
4	The Giant Co. (Martin's)	1	\$79.60	10.53%
5	BJ's Wholesale Club	1	\$49.10	6.5%
6	Giant Food	1	\$44.10	5.83%
7	Food Lion	3	\$43.60	5.77%
8	CVS	5	\$32.40	4.29%
9	7-Eleven	8	\$23.60	3.12%
10	Walgreens	3	\$20.70	2.74%
11	Aldi	2	\$17.70	2.34%
12	Sprouts	1	\$17.10	2.26%
13	Target	1	\$15.90	2.1%

See **MARYLAND COUNTY SHARE** on page 44

MARYLAND COUNTY SHARE OF MARKET: 2026

Continued from page 43

14	Royal Farm Stores	4	\$15.20	2.01%
15	High's	8	\$13.90	1.84%
16	Wawa	2	\$12.20	1.61%
17	IGA	1	\$10.95	1.45%
18	Sheetz	3	\$10.70	1.42%
19	Grocery Outlet	1	\$5.30	0.7%
		57	\$752.24	99.52%

7	CVS	7	\$37.90	5.66%
8	Sam's Club	1	\$37.40	5.59%
9	Food Lion	3	\$37.10	5.54%
10	Target	2	\$30.90	4.62%
11	Dash-In	12	\$23.40	3.5%
12	Walgreens	4	\$21.50	3.21%
13	Wawa	3	\$20.80	3.11%
14	Sprouts	1	\$15.20	2.27%
15	MOM's Organic Market	1	\$14.30	2.14%
16	Aldi	2	\$10.50	1.57%
17	Lidl	1	\$8.30	1.24%
		59	\$668.30	99.87%



CECIL COUNTY (\$331.9 million) (Includes Elkton, Northeast)

• Population	107,131	• Female	50.4%
• # of Households	40,600	• White	81.0%
• Median Income	\$92,007	• Black	9.3%
• Under 18	21.9%	• Hispanic	6.0%
• Over 65	18.2%	• Asian	1.6%

1	Walmart (SuperCenter)	2	\$66.80	20.13%
2	The Giant Co. (Martin's)	1	\$64.80	19.52%
3	Food Lion	3	\$36.40	10.97%
4	Wawa	4	\$28.50	8.59%
5	Redner's Markets	1	\$27.90	8.41%
6	Albertsons (Safeway)	1	\$23.90	7.2%
7	Royal Farm Stores	8	\$20.90	6.3%
8	Walgreens	3	\$13.90	4.19%
9	Aldi	1	\$10.60	3.19%
10	High's	4	\$9.30	2.8%
11	Grocery Outlet	1	\$7.30	2.2%
12	7-Eleven	2	\$6.40	1.93%
13	CVS	1	\$5.30	1.6%
14	Sheetz	1	\$5.00	1.51%
15	Fas-Marts	1	\$2.40	0.72%
		34	\$329.40	99.25%



DORCHESTER COUNTY (\$73.7 million) (Includes Cambridge)

• Population	33,628	• Female	52.4%
• # of Households	13,546	• White	65.8%
• Median Income	\$61,839	• Black	28.2%
• Under 18	20.5%	• Hispanic	6.6%
• Over 65	24.4%	• Asian	1.1%

1	Walmart (SuperCenter)	1	\$31.70	43.01%
2	Food Lion	1	\$13.10	17.77%
3	Aldi	1	\$10.30	13.98%
4	Wawa	1	\$8.40	11.4%
5	Walgreens	1	\$6.10	8.28%
6	Royal Farm Stores	1	\$3.60	4.88%
		6	\$73.20	99.32%



FREDERICK COUNTY (\$1.1 billion) (Includes Brunswick, Emmitsburg, Frederick, Thurmont)

• Population	302,883	• Female	50.6%
• # of Households	104,635	• White	65.0%
• Median Income	\$122,002	• Black	11.0%
• Under 18	23.1%	• Hispanic	14.0%
• Over 65	16.0%	• Asian	7.0%

1	Weis Markets	7	\$175.98	15.71%
2	Giant Food	3	\$137.20	12.25%
3	Walmart (SuperCenter)	2	\$133.90	11.95%
4	Wegmans	1	\$78.60	7.02%
5	CVS	13	\$74.60	6.66%
6	Food Lion	5	\$71.60	6.39%
7	Costco	1	\$65.00	5.8%
8	Giant Eagle	2	\$43.70	3.9%
9	Albertsons (Safeway)	2	\$40.80	3.64%
10	Sam's Club	1	\$37.20	3.32%
11	Sheetz	8	\$33.70	3.01%
12	Royal Farm Stores	7	\$29.60	2.64%



CHARLES COUNTY (\$669.2 million) (Includes Bryan's Road, Waldorf)

• Population	176,593	• Female	51.9%
• # of Households	61,685	• White	31.5%
• Median Income	\$122,816	• Black	54.9%
• Under 18	23.4%	• Hispanic	7.9%
• Over 65	14.6%	• Asian	3.3%


1	Albertsons (Safeway)	3	\$103.90	15.53%
2	Giant Food	2	\$88.70	13.25%
3	Walmart (SuperCenter)	2	\$84.60	12.64%
4	Weis Markets	2	\$51.30	7.67%
5	BJ's Wholesale Club	1	\$41.80	6.25%
6	7-Eleven	12	\$40.70	6.08%

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MARYLAND COUNTY SHARE OF MARKET: 2026

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13	Walgreens	5	\$29.30	2.62%
14	7-Eleven	14	\$26.10	2.33%
15	Aldi	2	\$24.70	2.2%
16	Target	1	\$17.80	1.59%
17	Wawa	3	\$17.40	1.55%
18	Rutter's Farm Stores	4	\$17.20	1.54%
19	Military Commissaries	1	\$15.02	1.34%
20	International Markets	1	\$14.60	1.3%
21	MOM's Organic Market	1	\$13.50	1.21%
22	Lidl	1	\$9.40	0.84%
23	High's	4	\$6.90	0.62%
24	Dash-In	1	\$2.30	0.21%
25	C&S Independents	2	\$1.20	0.11%
		92	\$1,117.30	99.74%




HARFORD COUNTY (\$1.12 billion)
(Includes Aberdeen, Bel Air, Havre de Grace)

- Population 266,446
- # of Households 101,021
- Median Income \$112,265
- Under 18 21.9%
- Over 65 18.5%
- Female 50.8%
- White 71.5%
- Black 15.8%
- Hispanic 6.2%
- Asian 3.30%

1	ShopRite (Klein's)	6	\$258.20	21.12%
2	Walmart (SuperCenter)	3	\$112.80	9.23%
3	Wegmans	1	\$102.10	8.35%
4	Giant Food	2	\$88.20	7.21%
5	Wawa	10	\$76.10	6.22%
6	Walgreens	10	\$63.10	5.16%
7	Weis Markets	2	\$57.69	4.72%
8	Target	3	\$56.20	4.6%
9	Royal Farm Stores	17	\$55.10	4.51%
10	BJ's Wholesale Club	1	\$49.30	4.03%
11	CVS	8	\$45.20	3.7%
12	Albertsons (Safeway)	1	\$40.10	3.28%
13	Redner's Markets	2	\$36.90	3.02%
14	Aldi	4	\$24.40	2.0%
15	Military Commissaries	1	\$21.97	1.8%
16	7-Eleven	13	\$21.60	1.77%
17	Family Owned Markets	1	\$21.20	1.73%
18	Sprouts	1	\$18.40	1.51%
19	Food Lion	2	\$11.70	0.96%
20	High's	6	\$11.20	0.92%
21	Lidl	1	\$10.60	0.87%
22	Save A Lot	1	\$5.60	0.46%

23	Grocery Outlet	1	\$5.10	0.42%
24	Sheetz	1	\$3.90	0.32%
		98	\$1,196.66	97.89%



HOWARD COUNTY (\$1.4 billion)
(Includes Columbia, Ellicott City, Laurel)

- Population 345,700
- # of Households 121,065
- Median Income \$149,763
- Under 18 23.1%
- Over 65 16.3%
- Female 50.7%
- White 46.45%
- Black 21.18%
- Hispanic 9.0%
- Asian 20.36%

1	Giant Food	7	\$304.40	22.49%
2	Harris Teeter	3	\$128.20	9.47%
3	Wegmans	1	\$112.90	8.34%
4	Walmart (SuperCenter)	2	\$83.20	6.15%
5	Albertsons (Safeway)	3	\$79.10	5.85%
6	Weis Markets	4	\$77.66	5.74%
7	Costco	1	\$72.50	5.36%
8	International Markets	3	\$62.00	4.58%
9	Target	2	\$46.70	3.45%
10	Amazon Groc. (Whole Foods)	1	\$45.10	3.33%
11	CVS	8	\$43.20	3.19%
12	BJ's Wholesale Club	1	\$40.10	2.96%
13	7-Eleven	12	\$34.10	2.52%
14	Trader Joe's	1	\$31.80	2.35%
15	Royal Farm Stores	8	\$27.10	2.0%
16	Food Lion	2	\$24.10	1.78%
17	B. Green (Green Valley)	1	\$22.00	1.63%
18	Sprouts	1	\$22.00	1.63%
19	Walgreens	4	\$21.60	1.6%
20	MOM's Organic Market	1	\$15.90	1.17%
21	Aldi	1	\$12.90	0.95%
22	Roots Markets	1	\$12.50	0.92%
23	High's	7	\$11.00	0.81%
24	Lidl	1	\$9.40	0.69%
25	Dash-In	2	\$5.90	0.44%
26	Circle K	2	\$5.30	0.39%
		80	\$1,350.66	99.81%

See **MARYLAND COUNTY SHARE** on page 46

MARYLAND COUNTY SHARE OF MARKET: 2026

Continued from page 45



KENT COUNTY (\$112.8 million) (Includes Chestertown, Worton)

• Population	19,565	• Female	52.1%
• # of Households	8,493	• White	77.8%
• Median Income	\$80,147	• Black	14.2%
• Under 18	15.6%	• Hispanic	5.8%
• Over 65	29.4%	• Asian	1.30%

1	Redner's Markets	1	\$27.10	24.02%
2	Walgreens	2	\$22.50	19.95%
3	Albertsons (Safeway)	1	\$20.90	18.53%
4	Food Lion	1	\$16.90	14.98%
5	Royal Farm Stores	2	\$7.20	6.38%
6	7-Eleven	1	\$3.40	3.01%
7	Fas-Marts	1	\$2.40	2.13%
8	High's	1	\$2.40	2.13%
9	C&S Independents	2	\$1.30	1.15%
		12	\$104.10	92.29%



MONTGOMERY COUNTY (\$4.3 billion) (Includes Bethesda, Gaithersburg, Germantown, Rockville)

• Population	1,074,582	• Female	51.3%
• # of Households	389,210	• White	38.0%
• Median Income	\$132,450	• Black	18.6%
• Under 18	22.5%	• Hispanic	21.7%
• Over 65	18.0%	• Asian	15.6%

1	Giant Food	26	\$1,073.20	24.93%
2	Albertsons (Safeway)	17	\$542.80	12.61%
3	CVS	42	\$480.60	11.16%
4	International Markets	22	\$394.60	9.17%
5	Amazon Groc. (Whole Foods)	6	\$265.70	6.17%
6	Trader Joe's	6	\$217.20	5.05%
7	Costco	2	\$212.80	4.94%
8	Wegmans	2	\$181.70	4.22%
9	Harris Teeter	6	\$179.30	4.17%
10	7-Eleven	67	\$165.20	3.84%
11	Target	6	\$140.40	3.26%
12	Aldi	9	\$93.70	2.18%
13	Walgreens	11	\$72.50	1.68%
14	MOM's Organic Market	3	\$53.20	1.24%
15	Sam's Club	1	\$50.00	1.16%
16	Walmart (SuperCenter)	1	\$44.10	1.02%
17	Weis Markets	2	\$31.37	0.73%
18	Lidl	4	\$22.60	0.52%
19	Sprouts	1	\$20.60	0.48%

20	Streets Market	1	\$13.50	0.31%
21	Food Lion	1	\$12.10	0.28%
22	Roots Markets	1	\$11.90	0.28%
23	The Fresh Market	1	\$11.40	0.26%
24	Wawa	1	\$5.80	0.13%
25	Royal Farm Stores	1	\$4.80	0.11%
26	Dash-In	1	\$2.50	0.06%
		241	\$4,303.57	99.97%



PRINCE GEORGE'S COUNTY (\$3.7 billion) (Includes Bowie, Clinton, College Park, Hyattsville, Laurel, Oxon Hill)

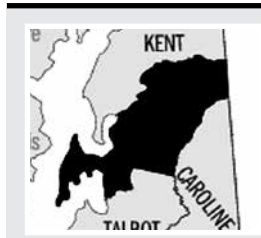
• Population	970,374	• Female	51.8%
• # of Households	347,744	• White	12.6%
• Median Income	\$101,798	• Black	60.4%
• Under 18	23.7%	• Hispanic	24.0%
• Over 65	14.7%	• Asian	4.0%

1	Giant Food	18	\$696.30	18.72%
2	International Markets	25	\$425.70	11.45%
3	7-Eleven	81	\$338.40	9.1%
4	Albertsons (Safeway)	9	\$294.20	7.91%
5	CVS	42	\$288.40	7.75%
6	Target	8	\$229.60	6.17%
7	Costco	3	\$215.20	5.79%
8	Shoppers	7	\$214.40	5.76%
9	Aldi	13	\$134.70	3.62%
10	Walmart (SuperCenter)	4	\$107.60	2.89%
11	Wegmans	1	\$101.40	2.73%
12	BJ's Wholesale Club	2	\$92.20	2.48%
13	Royal Farm Stores	15	\$69.20	1.86%
14	Wawa	11	\$68.10	1.83%
15	Military Commissaries	1	\$67.81	1.82%
16	Walgreens	9	\$63.60	1.71%
17	Lidl	5	\$46.80	1.26%
18	Food Lion	3	\$46.30	1.24%
19	Harris Teeter	2	\$42.90	1.15%
20	Weis Markets	3	\$40.45	1.09%
21	Amazon Groc. (Whole Foods)	1	\$37.10	1.0%
22	MOM's Organic Market	2	\$31.70	0.85%
23	Trader Joe's	1	\$19.80	0.53%
24	Dash-In	8	\$19.20	0.52%
25	Save A Lot	4	\$18.90	0.51%
26	Grocery Outlet	1	\$6.20	0.17%
27	Circle K	1	\$2.20	0.06%
		280	\$3,718.36	99.97%

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MARYLAND COUNTY SHARE OF MARKET: 2026

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QUEEN ANNE'S COUNTY (\$169.2 million) (Includes Centreville, Chester, Stevensville)

• Population	54,448	• Female	50.4%
• # of Households	19,907	• White	83.8%
• Median Income	\$115,639	• Black	5.9%
• Under 18	20.6%	• Hispanic	6.6%
• Over 65	22.0%	• Asian	1.2%

1	Albertsons (Safeway)	2	\$66.50	39.3%
2	Food Lion	2	\$25.80	15.25%
3	Target	1	\$21.00	12.41%
4	Walgreens	2	\$13.30	7.86%
5	7-Eleven	4	\$11.20	6.62%
6	Royal Farm Stores	3	\$9.80	5.79%
7	Wawa	1	\$8.70	5.14%
8	CVS	1	\$4.10	2.42%
9	Fas-Marts	2	\$3.10	1.83%
10	Dash-In	1	\$2.90	1.71%
		19	\$166.40	98.35%



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

• Population	24,973	• Female	45%
• # of Households	8,680	• White	52%
• Median Income	\$64,943	• Black	38.8%
• Under 18	17.9%	• Hispanic	5.3%
• Over 65	18.3%	• Asian	1.0%

1	Food Lion	2	\$29.80	64.5%
2	Royal Farm Stores	2	\$8.70	18.83%
3	Dash-In	1	\$2.90	6.28%
4	Fas-Marts	1	\$2.60	5.63%
		6	\$44.00	95.24%



ST. MARY'S COUNTY (\$410.1 million) (Includes Charlotte Hall, Leonardtown, Lexington Park)

• Population	116,692	• Female	49.57%
• # of Households	44,392	• White	71.3%
• Median Income	\$123,406	• Black	14.6%
• Under 18	24.04%	• Hispanic	6.6%
• Over 65	13.74%	• Asian	2.6%

1	Walmart (SuperCenter)	1	\$63.70	15.53%
2	Weis Markets	3	\$53.81	13.12%
3	BJ's Wholesale Club	1	\$41.80	10.19%
4	Giant Food	1	\$36.50	8.9%
5	Wawa	4	\$36.10	8.8%

6	Food Lion	2	\$28.70	7.0%
7	CVS	5	\$28.30	6.9%
8	Harris Teeter	1	\$26.50	6.46%
9	Aldi	3	\$23.60	5.75%
10	Military Commissaries	1	\$23.02	5.61%
11	Target	1	\$16.30	3.97%
12	Royal Farm Stores	3	\$11.10	2.71%
13	7-Eleven	3	\$7.90	1.93%
14	Sheetz	2	\$5.10	1.24%
15	Walgreens	1	\$4.60	1.12%
16	Dash-In	2	\$4.50	1.1%
		34	\$411.53	100.35%*



TALBOT COUNTY (\$237.3 million) (Includes Easton, St. Michael's)

• Population	38,238	• Female	52.2%
• # of Households	16,810	• White	74.0%
• Median Income	\$84,811	• Black	12.0%
• Under 18	18.3%	• Hispanic	10.6%
• Over 65	30.6%	• Asian	1.6%

1	Giant Food	1	\$40.80	17.19%
2	BJ's Wholesale Club	1	\$39.80	16.77%
3	Harris Teeter	1	\$29.20	12.31%
4	Walmart	1	\$26.20	11.04%
5	Albertsons (Acme)	1	\$21.40	9.02%
6	Target	1	\$19.50	8.22%
7	Weis Markets	1	\$9.73	4.1%
8	Aldi	1	\$9.70	4.09%
9	CVS	2	\$8.50	3.58%
10	Royal Farm Stores	2	\$7.90	3.33%
11	Wawa	1	\$7.50	3.16%
12	Walgreens	1	\$5.60	2.36%
13	High's	2	\$4.10	1.73%
14	7-Eleven	1	\$2.90	1.22%
15	Fas-Marts	1	\$2.40	1.01%
		18	\$235.23	99.13%



WASHINGTON COUNTY (\$634.6 million) (Includes Fountainhead, Hagerstown, Hancock)

• Population	157,228	• Female	49.1%
• # of Households	59,411	• White	72.9%
• Median Income	\$74,157	• Black	14.1%
• Under 18	21.6%	• Hispanic	8.4%
• Over 65	18.5%	• Asian	2.2%

1	The Giant Co. (Martin's)	4	\$195.20	30.76%
2	Walmart (SuperCenter)	2	\$138.10	21.76%
3	Weis Markets	3	\$76.00	11.98%

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MARYLAND COUNTY SHARE OF MARKET: 2026

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4	Sam's Club	1	\$45.10	7.11%
5	Walgreens	7	\$31.90	5.03%
6	Sheetz	8	\$30.10	4.74%
7	CVS	5	\$18.40	2.9%
8	Aldi	2	\$16.10	2.54%
9	Target	1	\$15.90	2.51%
10	Save A Lot	2	\$13.70	2.16%
11	Food Lion	1	\$11.80	1.86%
12	Wawa	2	\$10.20	1.61%
13	Lidl	1	\$8.80	1.39%
14	Grocery Outlet	1	\$6.40	1.01%
15	7-Eleven	2	\$5.80	0.91%
16	High's	2	\$4.90	0.77%
17	Royal Farm Stores	1	\$4.10	0.65%
		45	\$632.50	99.67%

9	Wawa	2	\$12.00	3.68%
10	7-Eleven	3	\$9.80	3.01%
11	Walgreens	1	\$7.30	2.24%
12	Fas-Marts	4	\$5.30	1.63%
13	Save A Lot	1	\$4.50	1.38%
14	Grocery Outlet	1	\$4.30	1.32%
15	Dash-In	1	\$2.90	0.89%
		33	\$323.60	99.29%



WORCESTER COUNTY (\$259.6 million) (Includes Ocean City, Pocomoke City, Snow Hill)

• Population	54,459	• Female	51.1%
• # of Households	24,136	• White	83.2%
• Median Income	\$81,745	• Black	12.4%
• Under 18	16.8%	• Hispanic	4.2%
• Over 65	29.9%	• Asian	1.60%

1	Walmart (SuperCenter)	2	\$92.10	35.48%
2	Food Lion	4	\$63.80	24.58%
3	CVS	3	\$23.60	9.09%
4	Albertsons (Acme)	1	\$19.80	7.63%
5	7-Eleven	7	\$17.80	6.86%
6	Wawa	2	\$13.10	5.05%
7	Aldi	1	\$11.40	4.39%
8	Royal Farm Stores	3	\$9.60	3.7%
9	Walgreens	1	\$9.20	3.54%
10	Fas-Marts	1	\$2.90	1.12%
		25	\$263.30	101.43%*

() 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 2026



WICOMICO COUNTY (\$325.9 million) (Includes Fruitland, Salisbury)

• Population	106,899	• Female	52.3%
• # of Households	40,470	• White	60.8%
• Median Income	\$76,210	• Black	28.5%
• Under 18	22.5%	• Hispanic	6.1%
• Over 65	17.5%	• Asian	2.9%

1	Walmart (SuperCenter)	2	\$86.90	26.66%
2	Albertsons (Acme)	1	\$42.50	13.04%
3	Food Lion	4	\$41.10	12.61%
4	Sam's Club	1	\$41.10	12.61%
5	Royal Farm Stores	8	\$24.10	7.39%
6	Target	1	\$16.70	5.12%
7	CVS	2	\$12.60	3.87%
8	Aldi	1	\$12.50	3.84%



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Discounters Make Headway Against Traditional Supers In Overstuffed \$64.4B Market

from page 1

and Costco, while gaining some market share versus Safeway, Harris Teeter and Shoppers Food. During the past 12 months, Giant opened a new store in Parkville, MD, and for its 160 stores, sales are estimated to be \$6.63 billion, an approximate 2 percent increase over last year's total.

CVS remained the leader among all drug retailers and increased its estimated annual sales by \$143 million despite the fact that it operated 23 fewer stores than a year ago. The primary reason for that gain was the liquidation of competitor Rite Aid, which closed all of its stores. Much of Rite Aid's volume went to CVS and Walgreens but supermarket retailers such as Giant, Safeway, Walmart, The Giant Company and Wegmans also gained business that Rite Aid once controlled. For the year, CVS operated 570 stores in the Mid-Atlantic and accrued estimated sales of \$3.91 billion.

Remaining in fourth place among all Mid-Atlantic merchants was Food Lion, which continued to be the best performing brand in the ADUSA portfolio (although not as robustly as in the Southeast). The Salisbury, NC-based grocery chain now operates 256 stores (same as last year) and saw estimated sales increases from \$3.49 billion to \$3.57 billion.

Albertsons Mid-Atlantic, which includes the Safeway, Acme and Balducci's banners in this study, had a generally flat year in the Baltimore-Washington area where most of its stores are based. For the seventh year in a row, Albertsons opened no new stores in the region (it closed one store in Rockville, MD). Sales increased slightly to \$3.52 billion from \$3.50 billion at its 122 supermarkets.

The Giant Company had a solid year and the ADUSA brand that's 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 estimated \$3.16 billion from \$3.11 billion during the last 12 months.

The convenience store leader in the \$64.4 billion market remained 7-Eleven. Operating both cor-

porately-owned and franchised c-stores, the Dallas, TX-based operator, which is owned by Japanese juggernaut Seven & i Holdings, now operates 1,130 stores in the Mid-Atlantic which produced an estimated \$3.03 billion in annual sales.

Moving up to eighth place among Mid-Atlantic retailers was Wegmans, which operated 27 large supermarkets in the region. The Rochester, NY uber-retailer benefited from above-the-normal comp store sales as well as the opening of a new store in Rockville, MD last June. Estimated annual revenue of \$2.55 billion made it the highest per store average supermarket operator in the entire region.

After more than two decades of sales and store growth in the region, Harris Teeter followed last year's pattern of disappointing sales while also closing four stores in the B-W market that were underperforming. The Matthews, NC-based Kroger subsidiary rang up estimated sales of \$2.46 billion at its 74 area stores (same store count as last year).

Rounding out the area's top 10 were the 146 International Markets (specialty and ethnic supermarkets that are at least 20,000 square feet in size are grouped together in this survey) that operate in the Mid-Atlantic. That's five more stores than last year giving the amalgamation of 146 specialty and ethnic supermarkets (mostly Hispanic and Asian) an estimated \$2.34 billion in annual sales.

Other retailers that topped the \$1 billion mark in annual sales in the 89-county region included: Costco (one of the best performers), whose 31 stores rang up estimated extrapolated revenue of \$2.31 billion; Target, which continued to find the competitive battle difficult, found the sales battle difficult and amassed flat estimated extrapolated sales of \$2.29 billion at its 113 stores, one more than last year; Weis Markets, which opened five new supermarkets over the past 12 months, had an excellent year at its 104 stores that produced \$2.26 billion in annual revenue; Walgreens, which like rival CVS ran fewer stores but benefited from Rite Aid's market withdrawal, now operates 289 stores and garnered \$1.95 billion

in estimated annual sales; regional convenience store power Wawa (another healthy operator this year), whose 216 c-stores (six more than last year) rang up estimated annual sales of \$1.66 billion; Amazon Grocery (which includes Whole Foods and its sole Daily Shop in Arlington, VA), was bolstered by strong WFM volume, but hurt by the closure of its Amazon Fresh grocery unit nationally. Regionally, that meant 10 AF units were shuttered. Now with 39 stores in the region, Amazon Grocery rang up estimated annual sales of \$1.61 billion; Aldi, one of the best performing retailers in the study with 160 stores (seven more than last year), increased its estimated annual revenue from \$1.44 billion to \$1.56 billion; Kroger, which continued to operate 37 conventional supermarkets and Marketplace stores in the Richmond and Tidewater markets, garnered estimated annual sales of \$1.43 billion, a slight increase over last year's volume; BJ's Wholesale Club opened a replacement club unit in Mechanicsburg, PA, and enjoyed a very productive year, operating 30 stores (the same as 2025) that garnered estimated extrapolated annual sales of \$1.26 billion; Sam's Club (a unit of Walmart), operated 26 club units in the Mid-Atlantic region (no change from last year) which amassed an estimated extrapolated annual volume of \$1.19 billion, a solid increase over last year's revenue; and rounding out the "billion dollar club" was Trader Joe's, which continued to produce comp store sales at an impressive rate. For its 36 stores in the region, three more than last year, the "treasure hunt" merchant collected estimated sales of \$1.02 billion in the 89-county Mid-Atlantic region.

By class of trade, the leaders were: supermarkets - Giant Food (Landover) with 160 stores, \$6.63 billion in sales; clubs - Costco with 31 stores, \$2.31 billion in estimated extrapolated sales; mass - Walmart with 157 stores and \$6.77 billion in estimated extrapolated sales; drug - CVS with 570 stores and \$3.91 billion in estimated sales; and convenience stores - 7-Eleven with 1,130 stores and an estimated \$3.03 billion in revenue.

Additionally, the 20 military commissaries in the region rang up annual sales of \$895.1 million, a huge increase from last year's figure of \$592.2 million

Viewed as a group, the 48 corporate chains in the market operated 4,954 stores and accrued an estimated \$63.37 billion in annual sales, good for 98.4 percent of the Mid-Atlantic region's \$64.4 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 \$183 million at its 10 Central PA stores. Ranking second among all indies in the region was Family Owned Markets, the Millersville, PA retail marketing group that supervises seven independent stores in Central PA and northern MD whose collective sales totaled \$128.9 million. Baltimore-based B. Green, which operates five supermarkets under the Green Valley banner, was the only other independent in the region to break the \$100 million annual sales mark - it rang up annual revenue of \$109 million. During the past year, the family-owned merchant closed both of its Food Depot stores in Baltimore City.

As a combined group, the 10 multi-store independent retail organizations in the Mid-Atlantic operated 50 supermarkets which garnered estimated annual sales of \$742.6 million. Collectively, those stores controlled 1.15 percent of the region's food and drug revenue.

As for major store changes among the 58 retailers surveyed in this market study, they were significant. The two major stories over the past year were the liquidation of Rite Aid stores nationally (affecting 112 stores in the Mid-Atlantic) and the shuttering of all Amazon Fresh stores (impacting 10 units in the region). Other significant store closings included 23 by CVS; 11 by Walgreens, eight by Grocery Outlet; and eight by Shoppers Food. Those that opened at least five stores in the market were Aldi (six); Wawa (six); and Weis Markets (five).

Competitive times (and softer sales and earnings) often mean

more change at the leadership level, too. During the past 12 months here's what happened: John Furner replaced long-time Walmart CEO Doug McMillan when he retired. Relatedly, Latriece Watkins took the helm at the company's Sam's Club division, replacing Chris Nicolas, who moved to head Walmart's international business unit. At Albertsons, veteran executive Susan Morris was promoted to chief executive, replacing Vivek Sankaran who retired. Shortly after being named to the top spot, Morris made several executive changes including moving Tom Lofland, who previously oversaw the chain's Mid-Atlantic division, to the retailer's Jewel division in Chicago and naming newcomer Sean Thompson (ex-Party City) to run the Malvern, PA-based division. Brian Cornell, Target's CEO since 2014, stepped down earlier this year (he remains its executive chairman) and was replaced by former Target CFO Michael Fiddelke. After Kroger CEO Rodney McMullen was pushed out of the job in early 2025, board member Ron Sargent was named interim chief executive. After a lengthy search, Kroger named former Walmart senior leader Greg Foran as its new CEO. Jason Hart, the man who helped lead Aldi to great success over the past decade, was promoted to run the company's global operations from Salzburg, Austria and was replaced by 20-year Aldi U.S. veteran Atty McGrath. Additionally, the merry-go-round that is the job of U.S. president of Lidl, continued to spin as former private equity executive Joel Rampoldt left the German discounter and was recently replaced by Lidl veteran Alan Barry. Another troubled retailer, Save A Lot, also switched chief executives. Fred Boehler, who was also a former board member, retired and ex-Wakefern stalwart Bill Mayo was elevated to CEO. And when PE firm Sycamore Partners acquired Walgreens for \$27.3 billion last year, it dispatched chief executive Tim Wentworth and replaced him with Mike Motz, who formerly ran Staples.

TAKING STOCK

from page 6

more-Washington market:

Giant Food – With concerns about the economy and the rifting of tens of thousands of federal jobs in the last year, the B-W market ain't what it once was: recession-proof. Once again, Giant's modus operandi was to play defense against the discounters (primarily Walmart and Aldi) while trying to make inroads against traditional supermarket competitors Safeway and Harris Teeter. After decades of significant growth in America's fifth largest market, Giant's progress is now measured in tenths of a percentage point. The B-W area has become so overcrowded and diversified with no open lane to in which to accelerate that the market's perennial leader since the 1970s now must now settle for small victories. Giant will open a new store later this year in Berlin, MD (outside the B-W market) and hopes it can acquire some Shoppers Food units if and when that company's remaining 14 stores become available.

Safeway – Safeway's strength remains its great locations, particularly in the Washington area. But that's no longer enough for them to hold serve. Ever since Albertsons acquired the company in 2015, it seems like Safeway's supermarkets are stuck in some sort of time vacuum. The stores are aging (with limited cap-ex devoted to major remodelings), its everyday pricing remains the highest of any chain in the market, and it has not opened a new store in years. However, there is something new happening at the executive level: Susan Morris was promoted to CEO (replacing the retired Vivek Sankaran). One of her first moves was to shift former Mid-Atlantic president Tom Lofland to a similar post at Jewel-Osco in Chicago and name newcomer Sean Thompson to pilot the Mid-Atlantic region. Thompson inherited a full-plate - virtually every retailer has cut into Safeway's market share in recent years and if the company believes that its heavy reliance on digital marketing and advertising is a game changer, I'd have someone review those notes. Morris knows the fundamentals of retail success very well; however, the hurdles she faces in trying to change the perception of a stale enterprise might be too difficult to overcome. Of course, if Albertsons wins its multi-million dollar lawsuit against Kroger, things could change rapidly

Walmart – It's been quite a productive 12 months for the world's largest retailer. The progress that the "Bentonville Behemoth" made was achieved without opening a single new store in the Mid-Atlantic. At the corporate level, veteran company executive John Furner was named CEO replacing the legendary Doug McMillon who retired. Furthermore, for the first time in its history, a large nearly 10-year investment finally paid off and its e-commerce business became profitable. From a sales growth perspective, Walmart made significant gains nationally on strong comp store revenue, which was also reflected at its 157 Mid-Atlantic stores. McMillon's prescient words still hold true: "Price leadership drives our business." That quality rings especially true in challenging economic times, which also helps to explain the big chain's continuing success. With 61 stores in the region slated for remodeling in the next 12 months, Walmart won't need to open any new stores to remain dominant and grow its market share.

Harris Teeter – This once-great regional chain seems to be suffering from "Krogeritis." As I noted last year, when Harris Teeter entered Washington in 1999, the upscale merchant seemed on a mission: replicate the service and consumer image that Giant had under the halcyon

TAKING STOCK continues on page 53



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IN REVIEW: AMAZON GROCERY

State	County	2026 Stores	2026 Sales (in millions)	2026 County Food Sales	% of 2026 County Market	2025 Stores	2025 Sales (in millions)	% of 2025 County Market
DC	Washington (Whole Foods)	9	\$387.50	\$2,804.20	13.82%	9	\$378.40	13.90%
DC Recap: 9 stores with sales of \$387.5 million. Total retail food sales for DC in the study: \$2.8 billion. Amazon Grocery share of DC is 13.82%.								
MD	Anne Arundel (Whole Foods)	1	\$51.60	\$2,635.90	1.96%	2	\$66.20	2.60%
MD	Baltimore City (Whole Foods)	2	\$66.70	\$1,450.60	4.60%	2	\$65.10	4.28%
MD	Baltimore County (Whole Foods)	1	\$34.90	\$3,814.40	0.91%	1	\$34.20	0.91%
MD	Howard (Whole Foods)	1	\$45.10	\$1,353.20	3.33%	1	\$43.90	3.28%
MD	Montgomery (Whole Foods)	6	\$265.70	\$4,304.80	6.17%	9	\$301.40	7.19%
MD	Prince George's (Whole Foods)	1	\$37.10	\$3,719.30	1.00%	1	\$35.80	0.98%
MD Recap: 12 stores with sales of \$501.1 million. Total retail food sales for MD in the study: \$24.54 billion. Amazon Grocery share of MD is 2.07%.								
PA	Lancaster (Whole Foods)	1	\$41.00	\$1,883.20	2.18%	1	\$39.90	2.16%
PA Recap: 1 store with sales of \$41.0 million. Total retail food sales for PA in the study: \$7.52 billion. Amazon Grocery share of PA is 0.55%.								
VA	Albemarle (Whole Foods)	1	\$39.10	\$755.10	5.18%	1	\$38.20	5.13%
VA	Arlington (WFM/Daily Shop)	3	\$61.80	\$1,004.20	6.15%	2	\$68.70	6.63%
VA	Fairfax (Whole Foods)	8	\$425.20	\$6,579.20	6.46%	11	\$385.50	6.06%
VA	Hampton/Newport News (Whole Foods)	1	\$33.60	\$1,337.30	2.51%	1	\$33.30	2.50%
VA	Henrico (Whole Foods)	2	\$49.10	\$2,149.30	2.28%	2	\$48.30	2.30%
VA	Loudoun (Whole Foods)	1	\$36.10	\$1,802.60	2.00%	1	\$34.80	1.99%
VA	Virginia Beach (Whole Foods)	1	\$39.10	\$1,976.80	1.98%	1	\$38.80	2.07%
VA Recap: 17 stores with sales of \$684.0 million. Total retail food sales for VA in the study: \$29.09 billion. Amazon Grocery share of VA is 2.43%.								

Mid-Atlantic Recap: 39 stores with sales of \$1.61 billion annually. Mid-Atlantic retail food sales total: \$64.4 billion.

Amazon Grocery Per Store Average: \$41.37 million () Name in parentheses indicates another banner used by the company.

Source: Food World, June 2026



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TAKING STOCK

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years of former CEO Izzy Cohen. And for many years it succeeded, the stores were beautiful, the staff was well trained, and HT spent plenty of money developing expensive new stores in urban and suburban locations. But something happened during and after COVID. The expansion effort slowed, the stores are getting older and its everyday retails could be a lot more competitive. Where are the new stores? What became of the high-powered corporate energy and why is the in-store culture so blah?

Wegmans – One of the better comp store performers against all channels and particularly strong when measured against other supermarkets. But then again, Wegmans is hardly an ordinary supermarket. During the past year, the Rochester-based retailer opened a new store in Rockville, MD and continued to differentiate itself from all others by its sheer skill and size. As I have previously noted, a hidden part of Wegmans' success is its site planning and demographics research. While all economic strata have been impacted by the uncertain economic conditions, the company's great (and very, very expensive) store locations - in addition to size, selection, overall product mix and execution - have protected it against major slumps. When you're averaging more than \$90 million per store in sales annually, you are doing a lot of things right.

Amazon Grocery – “Godzilla’s” brick-and-mortar “Grocery” division now only consists of one brand - Whole Foods - which had a very solid year, opening four new “natural and organic” stores and posting healthy comp store sales. Extinct as the dodo is Amazon’s former physical store grocery operation Amazon Fresh, which no longer exists after the parent firm acknowledged it was a loser. One of Whole Foods’ new store formats is its miniature model - Daily Shop - which debuted in Arlington, VA earlier this year. Although Amazon Fresh (and Amazon Go and Amazon Books and Amazon Style and Amazon 4-Star and Amazon Pop Up Shops) failed, the world’s largest online merchant is not giving up. Next up on the project docket is Project Kobe, the company’s brick-and-mortar answer to Walmart’s SuperCenter. Set to debut as early as next year in suburban Chicago and with other locations tabbed for Cherry Hill and Edison, NJ why not go big (or not go at all)? I mean, if the company couldn’t grasp operating 25,000 square foot grocery stores, what would make anybody think that opening stores 10 times that size featuring food and general merchandise would be much easier? Then again, the sheer earnings return from Amazon Web Services and its burgeoning advertising division alone could support multiple more failures. That’s why they’re Godzilla.

Aldi – My words of last year ring true again as the German-owned discounter put together another stellar year, combining new units with strong comp store sales. Those words were: if we could award a “best in class - small store division” trophy, Aldi would win. Its model is not for all shoppers and it’s still tough to buy one’s total weekly purchases in a footprint that’s typically smaller than 25,000 square feet, but for what it is, Aldi scores very highly. There’s enough product diversity to fill most of one’s shopping cart and its relationship with its private label vendors is strong, yielding high-quality products. Strong management, excellent store design solid in-store execution and deep corporate pockets make Aldi a top-tier food retailing powerhouse for today and in the future.

Weis Markets – Enjoyed an excellent year as it continued to

TAKING STOCK continues on page 65

WASHINGTON, DC SHARE OF MARKET: 2026



DISTRICT OF COLUMBIA (\$2.8 billion)

- Population 702,250
- # of Households 324,491
- Median Income \$109,707
- Under 18 18.7%
- Over 65 12.8%
- Female 52.5%
- White 36.5%
- Black 42.1%
- Hispanic 11.9%
- Asian 4.40%

Rank	Company	Stores	Sales (in millions)	% of Market
1	CVS	39	\$420.70	15.00%
2	Albertsons (Safeway)	12	\$416.60	14.86%
3	Amazon Groc. (Whole Foods)	9	\$387.50	13.82%
4	Giant Food	7	\$311.40	11.10%
5	Trader Joe's	7	\$201.30	7.18%
6	Harris Teeter	3	\$176.20	6.28%
7	International Markets	12	\$157.40	5.61%
8	Target	5	\$108.50	3.87%
9	Wegmans	1	\$95.20	3.39%
10	Costco	1	\$80.30	2.86%
11	Walgreens	9	\$76.30	2.72%
12	Streets Market	8	\$63.50	2.26%
13	Walmart (SuperCenter)	2	\$56.10	2.00%
14	7-Eleven	25	\$54.40	1.94%
15	Aldi	3	\$42.60	1.52%
16	MOM's Organic Market	2	\$34.20	1.22%
17	Military Commissaries	1	\$26.56	0.95%
18	Wawa	4	\$16.50	0.59%
19	Lidl	2	\$16.10	0.57%
		152	\$2,741.36	97.74%

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

Source: Food World, June 2026

PER STORE AVERAGES: 2026

Rank	Company	Stores	2026 Sales (in millions)	Per Store Avg. (in millions)
1	Wegmans	27	\$2,548.40	\$94.39
2	Costco*	31	\$2,311.60	\$74.57
3	The Giant Company	63	\$3,159.60	\$50.15
4	Sam's Club*	26	\$1,194.90	\$45.96
5	Military Commissaries*	20	\$895.10	\$44.76
6	Walmart (SC/Neighborhood Mkt)*	157	\$6,769.90	\$43.12
7	BJ's Wholesale Club*	30	\$1,260.00	\$42.00
8	Giant Food	160	\$6,625.10	\$41.41
9	Amazon Grocery (Whole Foods)	39	\$1,613.60	\$41.37
10	Kroger (Marketplace)	37	\$1,429.80	\$38.64

() 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 88.

Source: Food World, June 2026

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IN REVIEW: ALDI

State	County	2026 Stores	2026 Sales (in millions)	2026 County Food Sales	% of 2026 County Market	2025 Stores	2025 Sales (in millions)	% of 2025 County Market
DC	Washington	3	\$42.60	\$2,804.20	1.52%	2	\$26.10	0.96%
DC Recap: 3 stores with sales of \$42.6 million. Total retail food sales for DC in the study: \$2.8 billion. Aldi share of DC is 1.52%.								
DE	Kent	3	\$26.90	\$585.40	4.60%	3	\$26.40	4.59%
DE	Sussex	3	\$33.20	\$1,128.50	2.94%	3	\$32.50	2.92%
DE Recap: 6 stores with sales of \$60.1 million. Total retail food sales for DE in the study: \$1.71 billion. Aldi share of DE is 3.51%.								
MD	Anne Arundel	7	\$72.20	\$2,635.90	2.74%	7	\$68.80	2.71%
MD	Baltimore City	4	\$30.60	\$1,450.60	2.11%	4	\$28.90	1.90%
MD	Baltimore County	12	\$94.10	\$3,814.40	2.47%	12	\$88.40	2.34%
MD	Calvert	1	\$10.30	\$486.70	2.12%	0	\$0.00	0.00%
MD	Caroline	1	\$11.10	\$120.80	9.19%	1	\$10.90	9.77%
MD	Carroll	2	\$17.70	\$755.90	2.34%	2	\$17.30	2.28%
MD	Cecil	1	\$10.60	\$331.90	3.19%	1	\$10.10	3.10%
MD	Charles	2	\$10.50	\$669.20	1.57%	2	\$10.90	1.70%
MD	Dorchester	1	\$10.30	\$73.70	13.98%	1	\$10.20	14.17%
MD	Frederick	2	\$24.70	\$1,120.20	2.20%	2	\$22.80	2.13%
MD	Harford	4	\$24.40	\$1,222.50	2.00%	4	\$23.50	2.04%
MD	Howard	1	\$12.90	\$1,353.20	0.95%	1	\$12.50	0.94%
MD	Montgomery	9	\$93.70	\$4,304.80	2.18%	9	\$91.40	2.18%
MD	Prince George's	13	\$134.70	\$3,719.30	3.62%	13	\$129.70	3.54%
MD	St. Mary's	3	\$23.60	\$410.10	5.75%	1	\$9.10	2.27%
MD	Talbot	1	\$9.70	\$237.30	4.09%	1	\$9.50	4.02%
MD	Washington	2	\$16.10	\$634.60	2.54%	2	\$15.60	2.57%
MD	Wicomico	1	\$12.50	\$325.90	3.84%	1	\$12.30	3.75%
MD	Worcester	1	\$11.40	\$259.60	4.39%	1	\$11.10	4.29%
MD Recap: 68 stores with sales of \$631.1 million. Total retail food sales for MD in the study: \$24.54 billion. Aldi share of MD is 2.6%.								
PA	Cumberland	4	\$38.10	\$1,300.10	2.93%	4	\$39.80	3.09%
PA	Dauphin	3	\$29.20	\$1,118.70	2.61%	2	\$17.50	1.54%
PA	Franklin	2	\$19.70	\$546.80	3.60%	2	\$19.20	3.58%
PA	Lancaster	4	\$38.80	\$1,883.20	2.06%	4	\$37.20	2.01%
PA	Lebanon	1	\$9.80	\$489.20	2.00%	1	\$9.40	1.98%
PA	York	3	\$30.20	\$1,826.80	1.65%	3	\$29.10	1.63%
PA Recap: 17 stores with sales of \$165.8 million. Total retail food sales for PA in study: \$7.53 billion. Aldi share of PA is 2.2%.								
VA	Albemarle	2	\$20.90	\$755.10	2.77%	1	\$9.60	1.29%
VA	Chesapeake City	3	\$21.20	\$1,003.20	2.11%	3	\$20.30	2.03%
VA	Chesterfield	6	\$48.20	\$1,814.30	2.66%	6	\$45.10	2.56%
VA	Culpeper	1	\$11.00	\$197.40	5.57%	1	\$10.70	5.54%
VA	Fairfax	15	\$172.30	\$6,579.20	2.62%	14	\$154.30	2.43%
VA	Frederick	1	\$9.90	\$583.90	1.70%	1	\$9.60	1.71%
VA	Gloucester	1	\$12.30	\$136.10	9.04%	1	\$11.90	8.62%
VA	Hampton/Newport News	3	\$28.30	\$1,337.30	2.12%	3	\$27.10	2.03%

IN REVIEW: ALDI

State	County	2026 Stores	2026 Sales (in millions)	2026 County Food Sales	% of 2026 County Market	2025 Stores	2025 Sales (in millions)	% of 2025 County Market
VA	Hanover	1	\$10.10	\$559.70	1.80%	1	\$9.80	1.80%
VA	Henrico	6	\$51.50	\$2,149.30	2.40%	6	\$50.30	2.39%
VA	James City	1	\$9.90	\$443.80	2.23%	1	\$9.70	2.21%
VA	Loudoun	4	\$46.20	\$1,802.60	2.56%	4	\$44.40	2.54%
VA	Norfolk City	3	\$27.40	\$899.50	3.05%	3	\$26.50	3.02%
VA	Portsmouth City	1	\$10.20	\$323.60	3.15%	1	\$9.90	3.24%
VA	Prince William	6	\$68.90	\$2,278.50	3.02%	6	\$71.70	3.23%
VA	Spotsylvania	3	\$19.70	\$900.30	2.19%	3	\$19.20	2.18%
VA	Stafford	1	\$9.90	\$509.70	1.94%	1	\$9.60	1.96%
VA	Suffolk City	1	\$13.80	\$369.70	3.73%	1	\$13.10	3.70%
VA	Virginia Beach	6	\$57.50	\$1,976.80	2.91%	6	\$54.30	2.90%
VA	Warren	1	\$9.20	\$185.20	4.97%	1	\$8.90	5.02%

VA Recap: 66 stores with sales of \$658.4 million. Total retail food sales for VA in the study: \$29.09 billion. Aldi share of VA is 2.34%.

Mid-Atlantic Recap: 160 stores with sales of \$1.56 billion annually. Mid-Atlantic retail food sales total: \$64.4 billion. Aldi Per Store Average: \$9.74 million

Source: *Food World*, June 2026

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IN REVIEW: ALBERTSONS MID-ATLANTIC

State	County	2026 Stores	2026 Sales (in millions)	2026 County Food Sales	% of 2026 County Market	2025 Stores	2025 Sales (in millions)	% of 2025 County Market
DC	Washington (Safeway)	12	\$416.60	\$2,804.20	14.86%	12	\$408.20	14.99%

DC Recap: 12 stores with sales of \$416.6 million. Total retail food sales for DC in the study: \$2.8 billion. Albertsons Mid-Atlantic share of DC is 14.86%.

DE	Kent (Acme/Safeway)	2	\$62.40	\$585.40	10.66%	2	\$59.20	10.30%
DE	Sussex (Acme/Safeway)	2	\$70.20	\$1,128.50	6.22%	2	\$69.60	6.24%

DE Recap: 4 stores with sales of \$132.6 million. Total retail food sales for DE in the study: \$1.71 billion. Albertsons Mid-Atlantic share of DE is 7.74%.

MD	Anne Arundel (Safeway)	8	\$249.60	\$2,635.90	9.47%	8	\$248.70	9.78%
MD	Baltimore City (Safeway)	3	\$91.20	\$1,450.60	6.29%	3	\$95.10	6.25%
MD	Baltimore County (Safeway)	7	\$180.30	\$3,814.40	4.73%	7	\$182.10	4.83%
MD	Calvert (Safeway)	2	\$72.70	\$486.70	14.94%	2	\$72.00	16.01%
MD	Carroll (Safeway)	3	\$104.80	\$755.90	13.86%	3	\$105.70	13.92%
MD	Cecil (Acme)	1	\$23.90	\$331.90	7.20%	1	\$23.90	7.33%
MD	Charles (Safeway)	3	\$103.90	\$669.20	15.53%	3	\$103.50	16.16%
MD	Frederick (Safeway)	2	\$40.80	\$1,120.20	3.64%	2	\$40.30	3.76%
MD	Harford (Safeway)	1	\$40.10	\$1,222.50	3.28%	1	\$32.90	2.85%
MD	Howard (Safeway)	3	\$79.10	\$1,353.20	5.85%	3	\$78.80	5.90%
MD	Kent (Acme)	1	\$20.90	\$112.80	18.53%	1	\$20.90	20.12%
MD	Montgomery (Safeway)	17	\$542.80	\$4,304.80	12.61%	18	\$544.50	13.00%
MD	Prince George's (Safeway)	9	\$294.20	\$3,719.30	7.91%	9	\$293.60	8.01%
MD	Queen Anne's (Acme/Safeway)	2	\$66.50	\$169.20	39.30%	2	\$66.20	39.57%
MD	Talbot (Acme)	1	\$21.40	\$237.30	9.02%	1	\$21.10	8.92%
MD	Wicomico (Acme)	1	\$42.50	\$325.90	13.04%	1	\$42.30	12.90%
MD	Worcester (Acme)	1	\$19.80	\$259.60	7.63%	1	\$19.40	7.50%

MD Recap: 65 stores with sales of \$1.99 billion. Total retail food sales for MD in the study: \$24.54 billion. Albertsons Mid-Atlantic share of MD is 8.22%.

VA	Arlington (Balducci's/Safeway)	4	\$82.90	\$1,004.20	8.26%	4	\$81.40	7.85%
VA	Culpeper (Safeway)	1	\$17.00	\$197.40	8.61%	1	\$16.90	8.76%
VA	Fairfax (Safeway)	27	\$700.40	\$6,579.20	10.65%	27	\$702.30	11.05%
VA	Fauquier (Safeway)	1	\$22.40	\$216.80	10.33%	1	\$22.10	10.39%
VA	Loudoun (Safeway)	4	\$61.20	\$1,802.60	3.40%	4	\$60.60	3.46%
VA	Prince William (Safeway)	4	\$92.80	\$2,278.50	4.07%	4	\$92.10	4.14%

VA Recap: 41 stores with sales of \$976.6 million. Total retail food sales for VA in the study: \$29.09 billion. Albertsons Mid-Atlantic share of VA is 3.48%.

**Mid-Atlantic Recap: 122 stores with sales of \$3.52 billion annually. Mid-Atlantic retail food sales total: \$64.4 billion.
Albertsons Mid-Atlantic Per Store Average: \$28.86 million**

Source: Food World, June 2026

DELAWARE COUNTY SHARE OF MARKET: 2026

Total sales for those Delaware counties included in the study are \$1.71 billion

Rank	Company	Stores	Sales (in millions)	% of Market
1	Redner's Markets	3	\$80.40	13.73%
2	Wawa	7	\$73.80	12.61%
3	Walmart (SuperCenter)	2	\$71.90	12.28%
4	Albertsons (Acme/Safeway)	2	\$62.40	10.66%
5	Sam's Club	1	\$52.10	8.9%
6	Walgreens	8	\$49.50	8.46%
7	Food Lion	4	\$33.40	5.71%
8	Aldi	3	\$26.90	4.6%
9	Military Commissaries	1	\$25.75	4.4%
10	CVS	3	\$20.60	3.52%
11	Target	1	\$19.70	3.37%
12	Royal Farm Stores	8	\$18.50	3.16%
13	Fas-Marts	11	\$18.20	3.11%
14	International Markets	1	\$11.20	1.91%
15	Lidl	1	\$8.30	1.42%
16	7-Eleven	2	\$7.40	1.26%
17	High's	1	\$3.10	0.53%
		59	\$583.15	99.62%



KENT COUNTY (\$585.4 million) (Includes Dover, Harrington, Smyrna)

• Population	194,786	• Female	52.1%
• # of Households	71,424	• White	61.4%
• Median Income	\$74,477	• Black	30.8%
• Under 18	22.5%	• Hispanic	8.5%
• Over 65	19.2%	• Asian	2.60%

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

• Population	277,257	• Female	51.6%
• # of Households	106,441	• White	73.2%
• Median Income	\$81,497	• Black	11.5%
• Under 18	17.6%	• Hispanic	12.1%
• Over 65	31.8%	• Asian	1.50%

1	Giant Food	3	\$185.20	16.41%
2	Walmart (SuperCenter)	4	\$156.50	13.87%
3	Food Lion	9	\$156.20	13.84%
4	Wawa	10	\$96.70	8.57%
5	Walgreens	12	\$85.20	7.55%
6	Redner's Markets	3	\$77.20	6.84%
7	Albertsons (Acme/Safeway)	2	\$70.20	6.22%
8	Weis Markets	3	\$63.78	5.65%
9	Royal Farm Stores	21	\$59.20	5.25%
10	BJ's Wholesale Club	1	\$46.10	4.09%
11	Harris Teeter	2	\$39.50	3.5%
12	CVS	6	\$38.20	3.39%
13	Aldi	3	\$33.20	2.94%
14	C&S Independents	5	\$14.50	1.28%
15	Fresh Market	1	\$14.40	1.28%
16	Fas-Marts	7	\$11.80	1.05%
17	International Markets	1	\$9.80	0.87%
18	7-Eleven	2	\$7.50	0.66%
19	High's	2	\$5.10	0.45%
20	Save A Lot	1	\$5.00	0.44%
		98	\$1,175.28	104.15%*

() 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 2026

IN REVIEW: FOOD LION

State	County	2026 Stores	2026 Sales (in millions)	2026 County Food Sales	% of 2026 County Market	2025 Stores	2025 Sales (in millions)	% of 2025 County Market
DE	Kent	4	\$33.40	\$585.40	5.71%	4	\$32.80	5.71%
DE	Sussex	9	\$156.20	\$1,128.50	13.84%	9	\$149.80	13.44%
DE Recap: 13 stores with sales of \$189.6 million. Total retail food sales for DE in the study: \$1.71 billion. Food Lion share of DE is 11.06%.								
MD	Anne Arundel	5	\$73.30	\$2,635.90	2.78%	5	\$71.20	2.80%
MD	Baltimore County	6	\$64.60	\$3,814.40	1.69%	6	\$63.90	1.69%
MD	Caroline	2	\$22.90	\$120.80	18.96%	2	\$22.50	20.16%
MD	Carroll	3	\$43.60	\$755.90	5.77%	3	\$42.80	5.64%
MD	Cecil	3	\$36.40	\$331.90	10.97%	3	\$35.90	11.01%
MD	Charles	3	\$37.10	\$669.20	5.54%	3	\$44.50	6.95%
MD	Dorchester	1	\$13.10	\$73.70	17.77%	1	\$12.70	17.64%
MD	Frederick	5	\$71.60	\$1,120.20	6.39%	5	\$76.20	7.11%
MD	Harford	2	\$11.70	\$1,222.50	0.96%	2	\$11.40	0.99%
MD	Howard	2	\$24.10	\$1,353.20	1.78%	2	\$23.80	1.78%
MD	Kent	1	\$16.90	\$112.80	14.98%	1	\$16.60	15.98%
MD	Montgomery	1	\$12.10	\$4,304.80	0.28%	1	\$12.40	0.30%
MD	Prince George's	3	\$46.30	\$3,719.30	1.24%	3	\$43.00	1.17%
MD	Queen Anne's	2	\$25.80	\$169.20	15.25%	2	\$25.50	15.24%
MD	Somerset	2	\$29.80	\$46.20	64.50%	2	\$29.30	60.54%
MD	St. Mary's	2	\$28.70	\$410.10	7.00%	2	\$34.10	8.52%
MD	Washington	1	\$11.80	\$634.60	1.86%	1	\$11.70	1.93%
MD	Wicomico	4	\$41.10	\$325.90	12.61%	4	\$40.40	12.32%
MD	Worcester	4	\$63.80	\$259.60	24.58%	4	\$63.10	24.39%
MD Recap: 52 stores with sales of \$674.7 million. Total retail food sales for MD in the study: \$24.54 billion. Food Lion share of MD is 2.78%.								
PA	Franklin	1	\$11.50	\$546.80	2.10%	1	\$11.50	2.15%
PA	York	1	\$5.60	\$1,826.80	0.31%	1	\$5.30	0.30%
PA Recap: 2 stores with sales of \$17.1 million. Total retail food sales for PA in the study: \$7.52 billion. Food Lion share of PA is 0.23%.								
VA	Accomack	2	\$35.70	\$110.60	32.28%	2	\$35.20	32.81%
VA	Albemarle	6	\$68.50	\$755.10	9.07%	6	\$70.70	9.49%
VA	Caroline	2	\$18.60	\$35.10	52.99%	2	\$18.40	61.54%
VA	Chesapeake City	12	\$155.70	\$1,003.20	15.52%	12	\$158.40	15.88%
VA	Chesterfield	17	\$227.30	\$1,814.30	12.53%	17	\$233.60	13.25%
VA	Dinwiddie	4	\$40.90	\$142.60	28.68%	4	\$40.60	27.90%
VA	Essex	1	\$13.10	\$76.70	17.08%	1	\$12.90	16.19%
VA	Fairfax	2	\$32.40	\$6,579.20	0.49%	2	\$32.40	0.51%
VA	Fauquier	3	\$25.80	\$216.80	11.90%	3	\$25.60	12.03%
VA	Gloucester	2	\$24.50	\$136.10	18.00%	2	\$24.30	17.60%
VA	Goochland	3	\$37.90	\$50.60	74.90%	3	\$37.70	74.80%
VA	Greene	1	\$11.20	\$13.40	83.58%	1	\$11.10	62.01%
VA	Hampton/Newport News	16	\$320.10	\$1,337.30	23.94%	16	\$314.20	23.55%
VA	Hanover	6	\$78.80	\$559.70	14.08%	6	\$78.40	14.40%
VA	Henrico	14	\$219.20	\$2,149.30	10.20%	14	\$216.50	10.29%
VA	Isle of Wight	3	\$36.20	\$112.40	32.21%	3	\$35.80	32.43%
VA	James City	5	\$64.30	\$443.80	14.49%	5	\$63.90	14.55%
VA	King George	2	\$28.80	\$113.10	25.46%	2	\$28.60	26.09%
VA	King William	2	\$32.30	\$40.40	79.95%	2	\$32.50	78.69%
VA	Lancaster	1	\$16.20	\$79.10	20.48%	1	\$16.10	20.54%
VA	Loudoun	3	\$41.90	\$1,802.60	2.32%	3	\$41.80	2.39%
VA	Louisa	2	\$23.80	\$54.50	43.67%	2	\$23.60	43.62%
VA	Madison	1	\$15.20	\$18.60	81.72%	1	\$15.10	82.07%
VA	Mathews	1	\$15.50	\$18.30	84.70%	1	\$15.30	98.71%
VA	Middlesex	1	\$15.60	\$29.50	52.88%	1	\$15.50	52.72%
VA	New Kent	4	\$55.70	\$76.40	72.91%	4	\$53.70	74.79%
VA	Norfolk City	8	\$153.60	\$899.50	17.08%	8	\$149.60	17.07%

IN REVIEW: FOOD LION

State	County	2026 Stores	2026 Sales (in millions)	2026 County Food Sales	% of 2026 County Market	2025 Stores	2025 Sales (in millions)	% of 2025 County Market
VA	Northampton	2	\$23.40	\$44.90	52.12%	2	\$23.20	52.13%
VA	Northumberland	1	\$15.00	\$22.80	65.79%	1	\$14.90	65.07%
VA	Orange	3	\$31.80	\$155.80	20.41%	3	\$31.60	20.55%
VA	Page	2	\$12.50	\$81.80	15.28%	2	\$12.40	15.92%
VA	Portsmouth City	5	\$81.10	\$323.60	25.06%	5	\$80.20	26.23%
VA	Powhatan	2	\$25.50	\$86.00	29.65%	2	\$25.30	29.94%
VA	Prince George	2	\$23.30	\$106.30	21.92%	2	\$23.20	23.89%
VA	Prince William	9	\$146.20	\$2,278.50	6.42%	9	\$148.50	6.68%
VA	Richmond	1	\$15.20	\$21.90	69.41%	1	\$15.00	61.48%
VA	Shenandoah	3	\$46.10	\$132.10	34.90%	3	\$45.70	35.21%
VA	Southampton	2	\$31.20	\$89.80	34.74%	2	\$31.90	35.37%
VA	Spotsylvania	1	\$13.20	\$900.30	1.47%	1	\$13.10	1.49%
VA	Suffolk City	5	\$53.40	\$369.70	14.44%	5	\$52.80	14.91%
VA	Virginia Beach	21	\$279.40	\$1,976.80	14.13%	21	\$272.60	14.54%
VA	Westmoreland	2	\$29.10	\$55.80	52.15%	2	\$28.40	52.11%
VA	York	4	\$51.90	\$202.60	25.62%	4	\$51.40	25.75%

VA Recap: 189 stores with sales of \$2.69 billion. Total retail food sales for VA in the study: \$29.09 billion. Food Lion share of VA is 9.57%.

Mid-Atlantic Recap: 256 stores with sales of \$3.57 billion annually. Mid-Atlantic retail food sales total: \$64.4 billion.

Food Lion Per Store Average: \$13.94 million

Source: Food World, June 2026



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

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DIRECTORY OF RETAILERS

from page 12

Foods: Jason Buechel
SVP-Northeast Ops.-WFM: Nicole Davia
FW Stores: 39 (includes Whole Foods/Daily Shop)
Regional Vol: \$1.61 billion

America's Food Basket

401 Franklin Ave., Ste. 201
Garden City, NY 11530
Phone: (516) 502-2509
Web: afbasket.com
CEO: David Siegel
COO: Daniel Suriel
Primary Supplier: UNFI
FW Stores: 1
FW Volume: \$7.9 million

Associated Supermarket Group

99 Seaview Blvd., Ste. 360
Port Washington, NY 11050
Phone: (516) 256-3100
Web: asghq.com
Co-CEO/Co-Pres.: Joe Garcia
Co-CEO/Co-Pres: Zulema Wiscovitch

Primary Supplier: C&S Wholesale Grocers
FW Stores: 1
FW Volume: \$1.3 million
*This is the advertising and marketing arm that serves a group of independent retailers including such banners as Associated, Met and Pioneer.

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
FW Stores: 5 (Includes Green Valley Market)
FW Volume: \$109 million

Boyer's Markets

301 S. Warren St.
Orwigsburg, PA 17961
Phone: (570) 366-1477
Web: boyersfood.com

Pres.: Dean Walker
VP Finance: Shawn Moliatu
Director Fresh: Mellisa Erickson
Director Center Store: Kevin Kerschner
Human Resources: Frankie Nemeth
Primary Suppliers: Wakefern
FW Stores: 1
FW Volume: \$9.83 million

C&S Independents

336 East Penn Ave.
Robesonia, PA 19551
Phone: (610) 693-3161
Web: cswg.com
FW Stores: 66
FW Volume: \$110.4 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
FW Stores: 2
FW Volume: \$41.9 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
FW Stores: 7
FW Volume: \$128.9 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.

See **DIRECTORY** on page 64

Thank You

Our customers know they're going to find their favorite products on our shelves—and trusted suppliers like you make that happen!
We'd like to say a big "Thank You!" to our hard-working vendor partners for all they do to help us keep our customers happy and loyal.

Wegmans Food Markets

Eastern Shore Supermarket Leaders

- FL Remains Delmarva King
- Albertsons Flat, Share Dips
- Giant Per-Store Sales Solid
- Aldi's Comps Aid Revenue
- Gridlock Impacts E. Shore

Rank	Company	2026 Stores	2026 Sales (in millions)	% of 2026 Market	2025 Stores	2025 Sales (in millions)	% of 2025 Market
1	Food Lion	33	\$462.10	30.25%	33	\$451.10	30.13%
2	Albertsons (Acme/Safeway)	10	\$303.70	19.88%	10	\$298.70	19.95%
3	Giant Food	4	\$226.00	14.79%	4	\$221.90	14.82%
4	Redner's Markets	7	\$184.70	12.09%	7	\$179.40	11.98%
5	Aldi	11	\$115.10	7.53%	11	\$112.90	7.54%
6	Weis Markets	4	\$73.51	4.81%	4	\$71.83	4.80%
7	Harris Teeter	3	\$68.70	4.50%	3	\$67.80	4.53%
8	International Markets	2	\$21.00	1.37%	2	\$20.90	1.40%
9	C&S Independents	7	\$15.80	1.03%	7	\$15.30	1.02%
10	The Fresh Market	1	\$14.40	0.94%	1	\$14.20	0.95%
		82	\$1,485.01	97.21%	82	\$1,454.03	97.11%

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 \$1.53 billion.

Source: Food World, June 2026

Eastern Shore Market Leaders

- Alts. Share Now At 52.9%
- Leader WM Posts Healthy IDs
- Rite Aid's Exit Helps CVS, Wlg.
- C-Stores Now Control 16.8%
- Another Good Year For Food Lion

Rank	Company	2026 Stores	2026 Sales (in millions)	% of 2026 Market	2025 Stores	2025 Sales (in millions)	% of 2025 Market
1	Walmart (SuperCenter)	14	\$557.10	17.33%	14	\$544.50	17.19%
2	Food Lion	33	\$462.10	14.37%	33	\$451.10	14.24%
3	Albertsons (Acme/Safeway)	10	\$303.70	9.45%	10	\$298.70	9.43%
4	Giant Food	4	\$226.00	7.03%	4	\$221.90	7.01%
5	Wawa	25	\$224.40	6.98%	25	\$223.66	7.06%
6	Walgreens	30	\$210.00	6.53%	32	\$194.40	6.14%
7	Redner's Markets	7	\$184.70	5.75%	7	\$179.40	5.66%
8	Royal Farm Stores	61	\$182.00	5.66%	61	\$176.80	5.58%
9	Aldi	11	\$115.10	3.58%	11	\$112.90	3.56%
10	CVS	18	\$112.80	3.51%	18	\$96.60	3.05%
11	Sam's Club	2	\$93.20	2.90%	2	\$90.60	2.86%
12	BJ's Wholesale Club	2	\$85.90	2.67%	2	\$84.00	2.65%
13	Target	4	\$76.90	2.39%	4	\$74.60	2.36%
14	Weis Markets	4	\$73.51	2.29%	4	\$71.83	2.27%
15	Harris Teeter	3	\$68.70	2.14%	3	\$67.80	2.14%
16	Fas-Marts	35	\$66.90	2.08%	35	\$65.20	2.06%
17	7-Eleven	22	\$65.80	2.05%	21	\$60.20	1.90%
18	Military Commissaries	1	\$25.75	0.80%	1	\$17.85	0.56%
19	International Markets	2	\$21.00	0.65%	2	\$20.90	0.66%
20	C&S Independents	7	\$15.80	0.49%	7	\$15.30	0.48%
		295	\$3,171.36	98.65%	296	\$3,068.24	96.87%

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 88 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 \$3.21 billion.

Source: Food World, June 2026

DIRECTORY OF RETAILERS

from page 62

P.O. Box 1330
Salisbury, NC 28145
Phone: (704) 633-8250
Web: foodlion.com
Pres: Greg Finchum
SVP-Marketing: Deborah Sabo
VP-Sales: Tom Robinson
EVP-Operations: Troy Leshko
Primary Supplier: Direct
FW Stores: 256
FW Volume: \$3.57 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: Brian Johnson
GVP/Chief Marketing Officer: Emily Turner
GVP-HR: Revae Embs
GVP/CIO: Marcio Ribeiro
Primary Supplier: UNFI
FW Stores: 17
FW Volume: \$235.8 million

Geresbeck's Food Market

2109 Eastern Blvd.
Baltimore, MD 21220
Co-Owner: Joanne Greeley Graham
Co-Owner Justin Graham
Phone: (410) 686-3487
Web: geresbecks.com
Primary Supplier: C&S
FW Stores: 3
FW Volume: \$35.8 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
Pres.: John Ruane
Chief Merchant: Rebecca Lupfer
Chief Operator.: Dave Lessard
Chief Marketing Officer: John MacDonald
CFO: William Regan
Primary Distributor: Direct
FW Stores: 63 (Includes Martin's)
FW Volume: \$3.16 billion

Giant Eagle

700 Cranberry Woods Dr
Cranberry Township, PA 16066
Phone: (412) 963-6200
Web: giganteagle.com
CEO/President: Bill Artman
EVP/General Counsel: Greg Baker
EVP/CFO: Dave Burnworth
EVP/CPO: Janis Leigh
EVP/CTO: Graham Watkins
EVP/CMO: Justin Weinstein
Primary Supplier: Direct
FW Stores: 2
FW Volume: \$43.7 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
SVP-Merchandising/Chief Merchant: Tonya Douglas
VP-Mktg.: Dyani Hanrahan
VP-Finance: Tony Matala

VP-HR: Brian Wanner
VP-Dist.: Joe Urban
VP-Cat. Mgmt.-Fresh Foods: Richard Manzi
Primary Supplier: Direct
FW Stores: 160
FW Volume: \$6.63 billion

Graul's

12200 Tullamore Rd.
Lutherville, MD 21093
Phone: (410) 308-2100
Web: graulsmarket.com
Officers/Buyers: Harold Graul Jr., Fred Graul, Dennis Graul
Primary Supplier: UNFI
FW Stores: 5
FW Volume: \$58.5 million

Great Valu Supermarkets

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

See **DIRECTORY** on page 66



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410-783-7777 ext #1471
rjrogers@bgreenco.com

Retail Contact

Matt Battaglia
410-783-7777 ext #1306
matt.battaglia@bgreenco.com

Wholesale/Cash & Carry

Sean Thompson
443-225-0800
sean.thompson@bgreenco.com

TAKING STOCK

from page 53

increase market share in and around the fringes of the \$37.9 billion market. Most of those gains were achieved on the strength of opening five new stores - one in Frederick County and four in southern Maryland. In fact, the Sunbury, PA regional chain fared better around the DC area than it did in its own backyard of Northeast and Central PA. Weis also has a new store planned for Clarksburg, MD (northern Montgomery County). Over the past decade, Weis has become a more disciplined retailer with better merchandising and improved store operations. Its new supermarket model is handsome and efficient and Weis understands that if it wants to continue to succeed in B-W, it needs to stay on the edges of the battle zone, where costs are more reasonable and overstocking is generally a bit less of a factor.

Shoppers Food – RIP (almost). This once-great company has been in hospice for so long, it's time for parent firm UNFI to call Jack Kevorkian's wife.

'Round The Trade

Walmart continued its strong run by posting excellent Q1 results highlighted by a 4.1 percent gain in same-store sales at its U.S. stores. All of the "Behemoth's" numbers were strong: overall sales grew 7.3 percent; e-commerce jumped 26 percent; and its U.S. advertising business (including retail media), an important growth spur, increased 36 percent. Operating income for the period ended April 30 was up 5 percent to a healthy \$7.5 billion. "Our results reflect our continued focus on delivering across the enterprise - better shopping experiences, a broader assortment, and faster delivery. Our teams are adopting innovative technologies, driving productivity through automation, and growing higher margin commerce solutions. It's a disciplined approach that's helping us grow the business and strengthen returns," said John Furner, president and CEO. Internally, in the race to cut jobs as a result of the efficiencies of AI, Walmart confirmed it has eliminated about 1,000 jobs as it places greater focus on AI development. According to an internal memo written by Suresh Kumar, chief technology and development officer, and Daniel Denker, executive VP-AI acceleration product and design (who might be the most unpopular guy in Bentonville), the changes are being made "to simplify how the work is organized, make ownership clearer, and better align roles to the work and skills we need going forward. In some cases, we've had different teams working on similar problems." The memo also noted that Walmart had moved from organizing separately for Walmart U.S., Sam's Club, and its international markets to building in a unified way on a single, shared platform over the past year, according to the memo. As for AI, you can love, hate or fear it, but know it's never going to go away. More Walmart news: three key veteran Walmart executives will be leaving the company by the end of this month. At its Sam's Club unit, Tom Ward, COO, will be retiring and Diana Marshall, executive VP and chief experience officer, is resigning. Also exiting mothership Walmart will be Cedric Clark, executive VP-U.S. store operations. No replacements for the three executives, whose combined experience with the mega-merchant totals more than 45 years, have yet been named...we've got more recent financials to discuss including Walmart's chief rival Target's first quarter. The Minneapolis-based mass merchant posted some of its best revenue numbers in more than two years. Comp store sales increased 5.6 percent and e-commerce volume grew 8.9 percent. Part of the surprising recent success of the company (when compared to recent sales and earnings reports) is the growth in

TAKING STOCK continues on page 75

THE AUTHENTIC TASTE OF ITALY NOW ORGANIC



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DIRECTORY OF RETAILERS

from page 64

FW Stores: 3
FW Volume: \$25.8 million
*This is the advertising and marketing arm that serves a group of independents supplied by UNFI that operate in the FW/FTN marketing area.

Grocery Outlet

5650 Hollis St.
Emeryville, CA 94608
Phone: (510) 845-1999
Web: groceryoutlet.com
Chmn.: Eric Lundberg
Pres./CEO: Jason Potter
Chief HR Officer: Andrea Bortner
CFO: Chris Miller
Chief Merchandising/Purchasing Officer: Matt Delly
EVP/Chief Store Ops. Officer: Frank Kerr
EVP/General Counsel/Corp. Sec.: Luke Thompson
SVP-Strategy/Finance: Dorian Bertsch
SVP-Stores/Sales and Merch/: Jon Decker
Primary Supplier: Direct
FW Stores: 22
FW Volume: \$136.9 million

IGA

275 Schoolhouse Rd.
Cheshire, CT 04611
Phone: (203) 272-3511
FW Stores: 6
FW Volume: \$60.77
*This is the group of independent retailers that operate under the IGA banner and are supplied by Bozzuto's and supervised from its Cheshire, CT headquarters.

Harris Teeter

Div. of Kroger
701 Crestdale Rd.
Matthews, NC 28105
Phone: 704-844-3100
Web: harristeeter.com
Pres.: Tammy DeBoer
Central Region VP: Chris Pyne
VP-Legal Compliance: Taryn Mecia
VP-Real Estate: Keith Rudemiller
Primary Supplier: Direct
FW Stores: 74
FW Volume: \$2.46 billion

Karns Quality Food Ltd.

675 Silver Spring Rd.
Mechanicsburg, PA 17050
Phone: (717) 766-6477
Web: karnsfoods.com
CEO/Pres.: Andrea Karns
Chairman: D. Scott Karns
Primary Supplier: UNFI
FW Stores: 10
FW Volume: \$183.0 million

Key Food Stores Co-op, Inc.

100 Matawan Rd., Ste. 100
Matawan, NJ 07747
Phone: (848) 202-3100
Web: keyfoods.com
Pres.: Dean Janeway
COO: George Knobloch
Primary Supplier: C&S
FW Stores: 2
FW Volume: \$7.28 million
*This retailer-owned co-op serves as the advertising and marketing arm for a group of independent retailers in the Metro New York market, including Key Fresh, Food Dynasty, Food Emporium, Food Universe and SuperFresh.

Kroger

Mid-Atlantic Div.
140 Eastshore Dr., Ste. 300
Glen Allen, VA 23059
Phone: (804) 688-3600
Web: kroger.com
CEO: Greg Foran
EVP/CFO: David Kennerley
EVP/CMO: Mary Ellen Adcock
SVP-Retail: Valerie Jabbar
Pres.-Mid-Atlantic Div.: Kate Mora
Primary Supplier: Direct
FW Stores: 37 (Includes Marketplace)
FW Volume: \$1.43 billion

Lidl U.S.

3500 S. Clark St.
Arlington, VA 22202
Phone: (703) 832-4644
Web: lidl.com
CEO Lidl US: Alan Barry
COO Lidl US: Maciej Tylkowski
Chief Customer Officer US: Jassine Quali
EVP-Purchasing/Chief Commercial Officer: Miguel Paradelo Held
VP-Fresh: Tod Seiling
Chief Buying Officer: Peter Poutre
Primary Supplier: Direct
FW Stores: 64
FW Volume: \$582.3 million

MOM's Organic Market

5566 Randolph Rd
Rockville, MD 20852
Phone: (202) 791-3826
Web: momsorganicmarket.com
CEO: Scott Nash
Primary Supplier: UNFI
FW Stores: 20
FW Volume: \$330.1 million

Publix

3300 Publix Corporate Pkwy.
Lakeland, FL 33811
Phone: (863) 688-7407
CEO: Kevin Murphy
Pres.: John Goff
Exec. Chmn.: Todd Jones
CFO: David P. Phillips
VP-Charlotte Div.: Joey Riddle
4135 S. Stream Blvd., Ste. 500
Charlotte, NC 28217
Phone: (704) 424-5017
VP: Joey Riddle
Web: publix.com
Primary Supplier: Direct
FW Stores: 23
Regional Vol: \$397.6 million

Redner's Markets Inc.

3 Quarry Rd.
Reading, PA 19605
Phone: (610) 926-3700
Web: rednersmarkets.com
Chmn.: Elaine Redner
Pres./CEO: Ryan Redner
COO: Gary M. Redner
VP-Procurement: Dan Eberhart
VP/General Counsel: Jason Hopp
VP-Groc. Ops.: William Wallace
VP-Meat Ops.: Chris Morgan
VP-Perishables: Charles Link
VP-HR: Robert McDonough
VP-IT: Nicholas Hidalgo
Primary Supplier: UNFI
FW Stores: 14
FW Volume: \$325.1 million

Roots Market

5808 Clarksville Square Rd.
Clarksville, MD 21029
Phone: (443) 535-9321
Web: rootsmkt.com
Owner: Jeff Kaufman
CFO: Kevin Hoffmann
Primary Supplier: UNFI
FW Stores: 2
FW Volume: \$24.4 million

Save A Lot

400 Northwest Plaza Dr.
St. Ann, MO 63074
Phone: (314) 592-9100
Web: savealot.com
Chmn.: Mike Motz
CEO: Bill Mayo
Primary Supplier: Direct
FW Stores: 29
FW Volume: \$180.1 million

Sharp Shopper

1100 Sharp Ave.
Ephrata, PA 17522
Phone: (717) 733-9555
Web: sharpshopper.net
Owners: Mike & Darren Sharp
Primary Supplier: Direct
Regional Stores: 4
Regional Vol.: \$54.1 million

Shoppers Food

Div. of UNFI
16901 Melford Blvd., Ste. 300
Bowie, MD 20715
Phone: (301) 306-8600
Web: shoppersfood.com
CEO/Pres. (UNFI Retail): David Best
Primary Supplier: UNFI
FW Stores: 14
FW Volume: \$409.1 million

ShopRite

5000 Riverside Dr.
Keasby, NJ 08832
Phone: (908) 527-3300
Web: shoprite.com
Chmn.: Sean McMenamin
Pres.: Mike Stigers
CFO: Neil Falcone
EVP-Chief Sales Officer: Darren Caudill
Pres.-Price Rite: Kevin McDonnell
Pres.-ShopRite Supermarkets: Steve Savas
FW Stores: 14 (Includes Price Rite)
FW Volume: \$429.5 million
*This is the retail arm of wholesaler grocery co-op Wakefern Food Corp. Most of the ShopRite stores are independently owned. Most of the Price Rite stores are corporately owned.

See **DIRECTORY** on page 103



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brokers, and associates for their
continued support.



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Central Pennsylvania Supermarket Leaders

- The Giant Company Share: 54.4%
- Weis Holds Serve At #2
- Aldi Adds New Store
- Karns Remains Top Indie
- Supers Losing Ground To Alts.

Rank	Company	2026 Stores	2026 Sales (in millions)	% of 2026 Market	2025 Stores	2025 Sales (in millions)	% of 2025 Market
1	The Giant Company (Martin's)	52	\$2,523.10	54.41%	52	\$2,491.60	54.48%
2	Weis Markets	41	\$975.89	21.04%	41	\$959.55	20.98%
3	Karns Prime & Fancy Foods	10	\$183.00	4.01%	10	\$186.00	4.07%
4	Aldi	17	\$165.80	3.58%	16	\$152.20	3.33%
5	Wegmans	2	\$131.90	2.84%	2	\$132.30	2.89%
6	Family Owned Markets	6	\$107.70	2.32%	6	\$107.50	2.35%
7	Grocery Outlet	12	\$80.60	1.74%	12	\$80.20	1.75%
8	C&S Independents	46	\$70.20	1.51%	47	\$70.50	1.54%
9	Redner's Markets	3	\$54.50	1.18%	3	\$53.50	1.17%
10	IGA	5	\$49.82	1.07%	5	\$47.84	1.05%
		194	\$4,345.51	93.71%	194	\$4,281.19	93.61%

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 \$4.64 billion.

Source: Food World, June 2026

Fill your Frozen Aisle with Summer Snacking Faves from Mrs. T's!

Turn your frozen aisle into a snack lover's hot spot with Mrs. T's SNACK Pierogies. These bite-sized pockets of crispy, golden pasta are bursting with **bold, savory flavors** and are ready in minutes. If you're in the business of **driving profits** and **boosting basket value**, then you need Mrs. T's SNACK Pierogies on your shelves **today!**

Air Fry in 8 Mins

50 pieces per bag. Flavors include: cheddar, sour cream & onion; cheddar, ranch & bacon; five cheese.

Mrs. T's Pierogies
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Central Pennsylvania Market Leaders

- Alts. Now Garner 37.9%
- TGC Controls 33.6%
- Walmart Comps Among The Best
- New Club Units Impact Region
- RA Exit Creates Drug Shift

Rank	Company	2026 Stores	2026 Sales (in millions)	% of 2026 Market	2025 Stores	2025 Sales (in millions)	% of 2025 Market
1	The Giant Co. (Martin's)	52	\$2,523.10	33.55%	52	\$2,491.60	33.56%
2	Weis Markets	41	\$975.89	12.98%	41	\$959.55	12.92%
3	Walmart (SuperCenter)	20	\$891.60	11.86%	20	\$865.00	11.65%
4	CVS	69	\$432.10	5.75%	70	\$363.30	4.89%
5	Sheetz	71	\$296.50	3.94%	71	\$300.90	4.05%
6	Target	12	\$235.10	3.13%	12	\$233.10	3.14%
7	Turkey Hill	112	\$193.60	2.57%	114	\$192.10	2.59%
8	Sam's Club	4	\$186.70	2.48%	4	\$188.60	2.54%
9	Karns Prime & Fancy Foods	10	\$183.00	2.47%	10	\$186.00	2.50%
10	Rutter's Farm Stores	69	\$167.10	2.22%	69	\$153.80	2.07%
11	Aldi	17	\$165.80	2.20%	16	\$152.20	2.05%
12	Costco	3	\$150.40	2.00%	2	\$96.80	1.30%
13	BJ's Wholesale Club	4	\$132.60	1.76%	4	\$126.00	1.70%
14	Wegmans	2	\$131.90	1.75%	2	\$132.30	1.78%
15	Family Owned Markets	6	\$107.70	1.43%	6	\$107.50	1.45%
16	7-Eleven	36	\$105.90	1.41%	31	\$86.60	1.17%
17	Grocery Outlet	12	\$80.60	1.07%	12	\$80.20	1.08%
18	C&S Independents	46	\$70.20	0.93%	47	\$70.50	0.95%
19	Wawa	10	\$60.20	0.80%	10	\$60.30	0.81%
20	Redner's Markets	3	\$54.50	0.72%	3	\$53.50	0.72%
		599	\$7,147.49	95.05%	596	\$6,899.85	92.92%

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 88. 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 \$7.53 billion.

Source: Food World, June 2026

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BUSCAMOS DISTRIBUIDORES

VENTAS: SCOTT CAMERON | TEL. (908) 313-4861 | SALES@JJMGLLC.COM

DISTRIBUIDO POR JJ MARTIN GROUP, LLC | 90 SOUTH STREET, NEWARK, NJ | 862-240-1813

Karns Hosts Annual Charity Golf Outing June 10 At Range End Golf Club In Dillsburg, PA

Karns held its annual charity golf outing June 10 at Range End Golf Club in Dillsburg, PA. Welcoming golfers were these members of the Karns family: Andrea Karns, fourth generation family member May Karns Hoover, and Scott Karns.



This Four Seasons Produce foursome features Jon Steffy, Wes Jones, Dave Hahn and Wayne Hendrickson.



Affinity Group is well represented at the Karns golf outing by Mark Sisler, Ron Benjamin, Matt McShain and Dan McShain.



Smiling for our photographer are CA Ferolie's Tom Morrison, Jim Morrison, Pat O'Connell and Colin McHale.



On hand at the Karns outing from Utz are Tom Worley, Matt Schessler, Gary Little and Ed Burda (retired).



This duo from Clemens Food Group features Dan Feathers and Darrell Ledford.



These smiles belong to Adam Lanzendorfer of Imler's Poultry, Bruce Rudderow of Karns, Bryan Imler of Imler's Poultry, Mat Rudderow of Karns, and Bryce Imler of Imler's Poultry.



Mat Rudderow (2nd from l) of Karns is joined here by Seth Weaver, Craig Weaver and Cole Weaver of Weaver's of Wellsville.



This JOH photo features Adam Baldoni, Jeff Meyers, Paul McGee and Rick Daniels.



Industry consultant Kurt Schertle (r) is joined here by Bob Hager of Miele and Tim Parks of FMS.



Smiling for our photographer are Dan McCullough and Scott Karns of Karns and Geoff Mason of AJ Letizio.



THANK YOU!

Over 100 Years & Still Going Strong!

As we proceed through our second century, we want to thank all our Associates and Suppliers for being with us on this journey — you make it possible!

Klein's ShopRite: 9 Locations Serving the Baltimore Metro Area — in Harford County, Baltimore County and Baltimore City.

Michael J. Klein, Chairman; Marshall J. Klein, President & CEO; Sarah B. Klein, Vice President; Jacob I. Klein, Vice President; Stephen H. Klein, Vice President; David C. Klein, Vice President

Aberdeen

949 Beards Hill Road
(410) 272-3100
Pharmacy: (410) 272-3101

Cardiff

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

Forest Hill

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

Jacksonville

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

North Main St. Bel Air

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

Festival at Bel Air

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

Riverside

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

Parkville

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

Howard Park


4601 Liberty Heights Avenue • (410) 664-0240 • Pharmacy: (410) 367-1850

www.ShopRite.com

PENNSYLVANIA COUNTY SHARE OF MARKET: 2026

Total sales for those Pennsylvania counties included in the study are \$7.53 billion


Rank	Company	Stores	Sales (in millions)	% of Market
------	---------	--------	------------------------	----------------



ADAMS COUNTY (\$231.2 million)
(Includes Gettysburg, Littlestown)

- Population 107,594
- # of Households 42,119
- Median Income \$84,092
- Under 18 18.9%
- Over 65 23.0%
- Female 50.4%
- White 88.94%
- Black 1.84%
- Hispanic 7.74%
- Asian 0.86%

1	The Giant Co.	1	\$68.20	29.5%
2	Weis Markets	2	\$43.76	18.93%
3	IGA	3	\$34.00	14.71%
4	Walmart	1	\$26.90	11.63%
5	Sheetz	4	\$19.90	8.61%
6	Rutter's Farm Stores	4	\$10.60	4.58%
7	7-Eleven	3	\$8.40	3.63%
8	CVS	1	\$6.70	2.9%
9	Royal Farm Stores	2	\$6.50	2.81%
10	Turkey Hill	2	\$4.10	1.77%
		23	\$229.06	99.07%




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

- Population 277,270
- # of Households 114,465
- Median Income \$91,164
- Under 18 20.3%
- Over 65 19.6%
- Female 50.2%
- White 79.2%
- Black 4.1%
- Hispanic 5.2%
- Asian 5.8%

1	The Giant Co.	10	\$508.70	39.13%
2	Walmart (SuperCenter)	4	\$129.80	9.98%
3	Weis Markets	5	\$119.12	9.16%
4	Karns Prime & Fancy Foods	4	\$71.00	5.61%
5	CVS	12	\$69.50	5.35%
6	Wegmans	1	\$59.80	4.6%
7	Costco	1	\$48.20	3.71%
8	Sheetz	13	\$47.60	3.66%
9	BJ's Wholesale Club	1	\$45.80	3.52%
10	Aldi	4	\$38.10	2.93%
11	7-Eleven	12	\$35.70	2.75%
12	Target	2	\$34.80	2.68%
13	Sam's Club	1	\$30.80	2.37%
14	Trader Joe's	1	\$21.50	1.65%
15	Military Commissaries	1	\$15.19	1.17%
16	Grocery Outlet	2	\$15.10	1.16%
17	Turkey Hill	7	\$11.70	0.9%


18	Rutter's Farm Stores	5	\$11.00	0.85%
19	Wawa	1	\$4.20	0.32%
		87	\$1,319.61	101.5%*



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

- Population 293,351
- # of Households 121,358
- Median Income \$76,242
- Under 18 22.0%
- Over 65 18.8%
- Female 51.2%
- White 63.04%
- Black 17.22%
- Hispanic 12.7%
- Asian 6.54%

1	Giant/Carlisle	9	\$490.60	43.27%
2	Walmart	2	\$95.40	8.41%
3	CVS	13	\$82.40	7.27%
4	Weis Markets	4	\$73.31	6.47%
5	Costco	1	\$63.00	5.56%
6	Karns Prime & Fancy Foods	3	\$61.00	5.38%
7	Sheetz	12	\$52.30	4.61%
8	Sam's Club	1	\$40.30	3.55%
9	Target	2	\$31.50	2.78%
10	Aldi	3	\$29.20	2.58%
11	7-Eleven	9	\$24.60	2.17%
12	Turkey Hill	16	\$21.20	1.87%
13	ShopRite	1	\$15.80	1.39%
14	Sharp Shopper	1	\$10.80	0.95%
15	Boyer's Markets	1	\$9.83	0.87%
16	Lidl	1	\$6.80	0.60%
17	Rutter's Farm Stores	2	\$4.90	0.43%
18	Save A Lot	1	\$4.80	0.42%
19	Wawa	1	\$4.50	0.40%
20	C&S Independents	4	\$1.80	0.16%
		87	\$1,124.04	99.15%



FRANKLIN COUNTY (\$546.8 million)
(Includes Chambersburg, Greencastle, Waynesboro)

- Population 160,652
- # of Households 63,510
- Median Income \$77,003
- Under 18 21.6%
- Over 65 20.9%
- Female 50.7%
- White 87.82%
- Black 3.23%
- Hispanic 8.2%
- Asian 0.95%

1	The Giant Co. (Martin's)	4	\$173.50	31.73%
2	Walmart (SuperCenter)	2	\$99.20	18.14%
3	Weis Markets	5	\$79.54	14.55%
4	Sheetz	8	\$33.90	6.2%
5	BJ's Wholesale Club	1	\$33.80	6.18%
6	CVS	5	\$30.30	5.54%
7	Aldi	2	\$19.70	3.6%

See **PENNSYLVANIA COUNTY SHARE** on page 74

IN REVIEW: THE GIANT COMPANY

State	County	2026 Stores	2026 Sales (in millions)	2026 County Food Sales	% of 2026 County Market	2025 Stores	2025 Sales (in millions)	% of 2025 County Market
MD	Carroll (Martin's)	1	\$79.60	\$755.90	10.53%	1	\$77.10	10.15%
MD	Cecil (Martin's)	1	\$64.80	\$331.90	19.52%	1	\$62.70	19.22%
MD	Washington (Martin's)	4	\$195.20	\$634.60	30.76%	4	\$188.20	30.98%

MD Recap: 6 stores with sales of \$339.6 million. Total retail food sales for MD in the study: \$24.54 billion. The Giant Company share of MD is 1.4%.

PA	Adams	1	\$68.20	\$231.20	29.50%	1	\$67.40	29.28%
PA	Cumberland	10	\$508.70	\$1,300.10	39.13%	10	\$511.70	39.69%
PA	Dauphin	9	\$490.60	\$1,118.70	43.85%	9	\$485.30	42.77%
PA	Franklin (Martin's)	4	\$173.50	\$546.80	31.73%	4	\$168.20	31.40%
PA	Lancaster	14	\$545.70	\$1,883.20	28.98%	14	\$536.20	28.99%
PA	Lebanon	3	\$103.50	\$489.20	21.16%	3	\$101.60	21.38%
PA	Perry	1	\$33.20	\$123.40	26.90%	1	\$32.70	25.49%
PA	York	10	\$599.70	\$1,826.80	32.83%	10	\$588.50	33.01%

PA Recap: 52 stores with sales of \$2.52 billion. Total retail food sales for PA in the study: \$7.52 billion. The Giant Company share of PA is 33.55%.

VA	Culpeper (Martin's)	1	\$50.70	\$197.40	25.68%	1	\$50.00	25.91%
VA	Frederick (Martin's)	3	\$178.10	\$583.90	30.50%	3	\$174.90	31.14%
VA	Warren (Martin's)	1	\$68.10	\$185.20	36.77%	1	\$67.10	37.87%

VA Recap: 5 stores with sales of \$296.9 million. Total retail food sales for VA in the study: \$29.09 billion. The Giant Company share of VA is 1.06%.

Mid-Atlantic Recap: 63 stores with sales of \$3.16 billion annually. Mid-Atlantic retail food sales total: \$64.4 billion.

The Giant Company Per Store Average: \$50.15 million () Name in parentheses indicates another banner used by the company.

Source: Food World, June 2026

As one of the largest dairy operators in the U.S., HP Hood LLC offers a diverse portfolio of leading brands



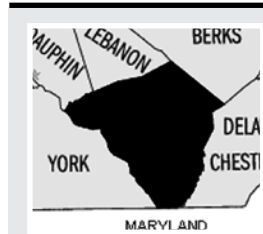
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21617

PENNSYLVANIA COUNTY SHARE OF MARKET: 2026

Continued from page 72

8	Target	1	\$18.90	3.46%
9	Rutter's Farm Stores	7	\$16.80	3.07%
10	Food Lion	1	\$11.50	2.1%
11	Save A Lot	2	\$8.10	1.48%
12	Grocery Outlet	1	\$7.10	1.3%
13	Wawa	1	\$4.50	0.82%
14	Turkey Hill	1	\$2.90	0.53%
15	7-Eleven	1	\$2.60	0.48%
16	C&S Independents	5	\$2.10	0.38%
		47	\$544.44	99.57%



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

• Population	563,293	• Female	50.9%
• # of Households	210,536	• White	80.0%
• Median Income	\$83,703	• Black	5.7%
• Under 18	22.9%	• Hispanic	11.7%
• Over 65	20.2%	• Asian	2.8%

1	The Giant Co.	14	\$545.70	28.98%
2	Weis Markets	13	\$331.76	17.62%
3	Walmart (SuperCenter)	3	\$168.80	8.96%
4	CVS	22	\$128.70	6.83%
5	Turkey Hill	58	\$105.70	5.61%
6	Sheetz	17	\$72.40	3.84%
7	Wegmans	1	\$72.10	3.83%
8	Family Owned Markets	3	\$68.30	3.63%
9	Target	3	\$65.10	3.46%
10	Whole Foods	1	\$41.00	2.18%
11	Costco	1	\$39.20	2.08%
12	Aldi	4	\$38.80	2.06%
13	Wawa	4	\$31.80	1.69%
14	BJ's Wholesale Club	1	\$29.10	1.55%
15	C&S Independents	21	\$27.80	1.48%
16	Sharp Shopper	2	\$25.80	1.37%
17	Grocery Outlet	4	\$23.90	1.27%
18	Redner's Markets	1	\$15.70	0.83%
19	Rutter's Farm Stores	5	\$15.50	0.82%
20	Walgreens	1	\$8.10	0.43%
21	Lidl	1	\$7.40	0.39%
22	7-Eleven	3	\$6.90	0.37%
23	Save A Lot	1	\$4.90	0.26%
24	IGA	1	\$4.42	0.23%
25	Royal Farm Stores	1	\$3.40	0.18%
		186	\$1,882.28	99.95%



LEBANON COUNTY (\$489.2 million) (Includes Lebanon)

• Population	161,410	• Female	50.7%
• # of Households	56,712	• White	77.0%
• Median Income	\$78,425	• Black	2.1%
• Under 18	22.2%	• Hispanic	14.2%
• Over 65	20.1%	• Asian	1.6%

1	Walmart (SuperCenter)	2	\$104.20	21.3%
2	The Giant Co.	3	\$103.50	21.16%
3	Weis Markets	3	\$75.05	15.34%
4	Redner's Markets	2	\$38.80	7.93%
5	CVS	5	\$36.20	7.4%
6	Target	1	\$20.10	4.11%
7	Turkey Hill	11	\$20.10	4.11%
8	C&S Independents	6	\$19.10	3.9%
9	ShopRite	1	\$15.30	3.13%
10	Grocery Outlet	2	\$12.70	2.6%
11	Sheetz	2	\$10.00	2.04%
12	Aldi	1	\$9.80	2.0%
13	America's Food Basket	1	\$7.90	1.61%
14	7-Eleven	2	\$5.90	1.21%
15	Rutter's Farm Stores	2	\$5.30	1.08%
16	Key Food	1	\$1.93	0.39%
17	ASG	1	\$1.30	0.27%
		46	\$487.18	99.59%



PERRY COUNTY (\$123.4 million) (Includes New Bloomfield)

• Population	46,806	• Female	49.2%
• # of Households	18,300	• White	94.0%
• Median Income	\$79,444	• Black	0.8%
• Under 18	20.70%	• Hispanic	2.5%
• Over 65	21.8%	• Asian	0.3%

1	The Giant Co.	1	\$33.20	26.9%
2	Karns Prime & Fancy Foods	2	\$33.00	27.55%
3	Weis Markets	1	\$26.82	21.73%
4	Sheetz	2	\$12.30	9.97%
5	C&S Independents	6	\$8.10	6.56%
6	Rutter's Farm Stores	1	\$3.30	2.67%
7	7-Eleven	1	\$3.20	2.59%
		14	\$119.92	97.99%

See PENNSYLVANIA COUNTY SHARE on page 76

TAKING STOCK

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its food and beverage business, which added 3,000 new grocery items during the 13-week period. On the profit side, there's more work to do as adjusted operating income was \$1.1 billion, a 22.9 percent decrease from prior-year GAAP (Generally Accepted Accounting Principles) operating income and a 29.1 percent increase from prior-year adjusted operating income. The sales trend is encouraging and is the first full period under the leadership of Michael Fiddelke, who replaced Brian Cornell as CEO on February 1...at Costco, the strongest financial performer since 2019, happy days continue. Net sales skyrocketed 11.6 percent for its third quarter and same-store revenue vaulted 6.6 percent (ex-gas). Every metric at the Issaquah, WA-based club dynamo increased including e-commerce sales up 21.5 percent; net income rose 15 percent to \$2.19 billion; and membership fees were \$1.37 billion, a 10.7 percent growth rate. Costco's discounted fuel prices sparked a large part of the big jump. Costco officials acknowledged that the final five weeks of Q3 (ended May 28) were the best in the company's 43-year history. And there's UNFI. After posting its first profit in more than five years (a mere \$33 million on sales of \$7.7 billion) during its third quarter, the Providence-based wholesaler/retailer announced a 4.2 percent decline in sales, which it blamed primarily on transition costs associated with the closure of its Allentown, PA distribution center in 2025. That DC, which was built exclusively to supply Key Food, had no use after the Matawan, NJ-based co-op and UNFI parted ways last year. But to UNFI chief executive "Sandy" Douglas, the situation continued to be sunshine and lollipops. "Through disciplined execution of our value creation strategy, we delivered underlying sales growth, higher profitability and strong free cash flow, which strengthened our balance sheet and increased our financial flexibility," he noted after the release of its financials. As I've been saying for more than two years: Sandy, talk to your independent retail customers and see if they're feeling that same "kumbaya" vibe...Amazon's "Prime Days" will now be a four-day event commencing on June 23. According to consumer insights firm Numerator, the online shopping bonanza could yield more than \$11 billion in sales and attract 59 million households. Not to be left in the dark, Walmart's "Deals" summer sale will run from June 22-28 and Target's "Circle Deal Days" will begin on June 22 (for Circle 360 members) and end on June 26... more supporting evidence on how challenging the economy is currently, both from a statistical perspective and a "mood" view. Last month the CPI reached an inflationary level of 4.2 percent, up from 3.8 percent in April. Soaring fuel costs are the primary culprit but higher gas prices

TAKING STOCK continues on page 78

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PENNSYLVANIA COUNTY SHARE OF MARKET: 2026

Continued from page 74



YORK COUNTY (\$1.8 billion) (Includes Hanover, Shrewsbury, York)

• Population	473,197	• Female	50.1%
• # of Households	181,583	• White	78.7%
• Median Income	\$84,829	• Black	6.3%
• Under 18	21.6%	• Hispanic	9.6%
• Over 65	18.4%	• Asian	1.30%

1	The Giant Co.	10	\$599.70	32.83%
2	Walmart (SuperCenter)	6	\$267.30	14.63%
3	Weis Markets	8	\$226.53	12.4%
4	Sam's Club	2	\$115.60	6.33%
5	Rutter's Farm Stores	43	\$99.70	5.46%
6	CVS	11	\$78.30	4.29%
7	Target	3	\$64.70	3.54%
8	Sheetz	13	\$48.10	2.63%
9	Family Owned Markets	3	\$39.40	2.16%
10	Aldi	3	\$30.20	1.65%

11	Royal Farm Stores	9	\$28.80	1.58%
12	Turkey Hill	17	\$27.90	1.53%
13	BJ's Wholesale Club	1	\$23.90	1.31%
14	Walgreens	3	\$22.40	1.23%
15	Grocery Outlet	3	\$21.80	1.19%
16	7-Eleven	5	\$18.60	1.02%
17	Karns Prime & Fancy Foods	1	\$18.00	0.99%
18	Sprouts	1	\$16.30	0.89%
19	ShopRite	1	\$15.30	0.84%
20	Wawa	3	\$15.20	0.83%
21	Great Valu	1	\$13.80	0.76%
22	IGA	1	\$11.40	0.62%
23	C&S Independents	4	\$11.30	0.62%
24	Food Lion	1	\$5.60	0.31%
25	Save A Lot	1	\$4.30	0.24%
		154	\$1,824.13	99.85%

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

Source: Food World, June 2026



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IN REVIEW: WEIS MARKETS

State	County	2026 Stores	2026 Sales (in millions)	2026 County Food Sales	% of 2026 County Market	2025 Stores	2025 Sales (in millions)	% of 2025 County Market
DE	Sussex	3	\$63.78	\$1,128.50	5.65%	3	\$61.73	5.54%

DE Recap: 3 stores with sales of \$63.78 million. Total retail food sales for DE in the study: \$1.71 billion. Weis Markets share of DE is 3.72%.

MD	Anne Arundel	3	\$52.58	\$2,635.90	1.99%	3	\$52.76	2.08%
MD	Baltimore County	11	\$273.95	\$3,814.40	7.18%	11	\$270.14	7.16%
MD	Calvert	5	\$99.48	\$486.70	20.44%	3	\$49.96	11.11%
MD	Carroll	5	\$106.19	\$755.90	14.05%	5	\$103.84	13.68%
MD	Charles	2	\$51.30	\$669.20	7.67%	1	\$11.59	1.81%
MD	Frederick	7	\$175.98	\$1,120.20	15.71%	6	\$154.31	14.40%
MD	Harford	2	\$57.69	\$1,222.50	4.72%	2	\$53.83	4.67%
MD	Howard	4	\$77.66	\$1,353.20	5.74%	4	\$77.36	5.79%
MD	Montgomery	2	\$31.37	\$4,304.80	0.73%	2	\$31.34	0.75%
MD	Prince George's	3	\$40.45	\$3,719.30	1.09%	3	\$41.32	1.13%
MD	St. Mary's	3	\$53.81	\$410.10	13.12%	2	\$41.02	10.25%
MD	Talbot	1	\$9.73	\$237.30	4.10%	1	\$10.10	4.27%
MD	Washington	3	\$76.00	\$634.60	11.98%	3	\$74.44	12.25%

MD Recap: 51 stores with sales of \$1.11 billion. Total retail food sales for MD in the study: \$24.54 billion. Weis Markets share of MD is 4.56%.

PA	Adams	2	\$43.76	\$231.20	18.93%	2	\$43.11	18.73%
PA	Cumberland	5	\$119.12	\$1,300.10	9.16%	5	\$114.81	8.90%
PA	Dauphin	4	\$73.31	\$1,118.70	6.55%	4	\$78.58	6.93%
PA	Franklin	5	\$79.54	\$546.80	14.55%	5	\$83.78	15.64%
PA	Lancaster	13	\$331.76	\$1,883.20	17.62%	13	\$325.77	17.62%
PA	Lebanon	3	\$75.05	\$489.20	15.34%	3	\$69.80	14.69%
PA	Perry	1	\$26.82	\$123.40	21.73%	1	\$20.77	16.19%
PA	York	8	\$226.53	\$1,826.80	12.40%	8	\$222.93	12.51%

PA Recap: 41 stores with sales of \$975.89 million. Total retail food sales for PA in study: \$7.53 billion. Weis Markets share of PA is 12.98%.

VA	Culpeper	1	\$14.32	\$197.40	7.25%	1	\$14.29	7.40%
VA	Spotsylvania	5	\$58.89	\$900.30	6.54%	5	\$60.10	6.83%
VA	Stafford	3	\$36.09	\$509.70	7.08%	3	\$36.38	7.44%

VA Recap: 9 stores with sales of \$109.3 million. Total retail food sales for VA in the study: \$29.09 billion. Weis Markets share of VA is 0.39%.

Mid-Atlantic Recap: 104 stores with sales of \$2.56 billion annually.

Mid-Atlantic retail food sales total: \$64.4 billion.

Weis Markets Per Store Average: \$21.68 million

Source: Food World, June 2026



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TAKING STOCK

from page 75

impact every level of transportation - individual and business. Climate conditions and foreign influences are also a factor. And just in the food segment, lettuce rose 16 percent from April, and tomatoes prices are up about 40 percent from a year ago, and beef prices have increased 13 percent from a year ago, continuing a trendline that began in 2023. From the "mood view, comes data from a new Gallup poll, in which U.S. consumers rate the economy as 'poor,' a level not seen since COVID. Of those polled, 75 percent believe the economy is getting worse. Moreover, the Gallup "economic confidence index" now sits at negative 45; the highest possible rate is +100. Ouch! OK, kiddies, I want to reveal my new word of the month: screwworm. Think about it!

Local Notes

Kudos to our friends at Giant Food for their continued commitment to providing food and services to communities and cities that are needful. The Landover, MD-based regional chain recently released its sixth annual "Better Neighbor Report," highlighting the company's efforts throughout 2025 to help its communities, customers, and associates thrive. "As a community grocery store, it is our responsibility to show up for our associates, customers, and community and to provide them with the resources and services that help them live their best life," said Ira Kress, president of Giant Food. "The Better Neighbor Report demonstrates exactly that. Community connection is a foundation that has shaped Giant Food for 90 years and continues to guide everything we do." Among the charities and contributions made were: 6,364,106 meals totaling more than 7 million pounds of food to Giant's Feeding America food bank partners; \$960,000 to support programs that fight against hunger through the Giant Family Foundation; \$1.84 million to help fund research at John Hopkins Medicine and The Children's Cancer Foundation Inc. Additionally, the large Ahold Delhaize USA brand: provided more than 338,000 vaccinations services for COVID-19, boosters, flu and non-flu, and hosted 1,336 community clinics; and raised \$224,991 for 904 nonprofits through its Bags4MyCause charity fundraising program. Positive initiatives inside Giant featured the addition of 22 new or promoted store managers; 78 new or promoted assistant managers; and 218 new or promoted department managers. The chain also completed more than 328,243 hours of in-person or online training, encompassing the areas of leadership development and functional skills development, while also providing \$182,000 in scholarships and grants to 53 Giant associates or their children. This in addition to more than \$220,700 provided for tuition reimbursement or to earn a GED. At other ADUSA brands, Geoff Waldau, executive VP-merchandising at Food Lion, retired on June 6 after nearly 39 years the parent organization (he came from the Delhaize America branch), including a stint at the now defunct Kash n' Karry/Sweetbay banners. He'll be replaced by Gene Faller, currently senior VP-center store management for the Salisbury, NC-based brand. Faller first joined Food Lion in 1988 and also did a hitch with sister merchant, the late and not so great Bottom Dollar Food. At AD Retail Media, Bernadette "Bernie" Van Osdal, VP-sales, will be retiring on July 31 after three years with the company's newest unit. Before joining AD Retail Media, Van Osdal enjoyed a long career in advertising and retail media...The Fresh Market (TFM), another one of those retailers that can't seem to connect with consumers on a consistent basis, closed in Vienna, VA earlier this month. In April, TFM also closed a small-box fresh-driven store in another upscale berg, Montvale, NJ. If you're gonna sign leases in expensive locales, the margin for error is considerably

TAKING STOCK continues on page 106

THANK YOU

to our vendors for another year of hard work, dedication and continued partnership.



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Richmond-Norfolk Supermarket Leaders

- Food Lion Still Dominates
- Kroger Share Up Slightly
- Aldi Gains On New Store
- Wegmans Tops Per-Store Sales
- Harris Teeter Share At 11.3%

Rank	Company	2026 Stores	2026 Sales (in millions)	% of 2026 Market	2025 Stores	2025 Sales (in millions)	% of 2025 Market
1	Food Lion	155	\$2,204.50	37.56%	155	\$2,189.20	37.91%
2	Kroger (Marketplace)	37	\$1,429.80	24.36%	37	\$1,404.30	24.32%
3	Harris Teeter	25	\$665.20	11.33%	25	\$649.80	11.25%
4	Publix	20	\$345.60	5.89%	20	\$339.40	5.88%
5	Aldi	34	\$311.30	5.30%	33	\$287.60	4.98%
6	Wegmans	4	\$290.50	4.95%	4	\$286.20	4.96%
7	Amazon Groc. (Whole Foods)	5	\$160.90	2.74%	5	\$158.60	2.75%
8	Trader Joe's	6	\$127.40	2.17%	6	\$125.10	2.17%
9	Lidl	15	\$125.30	2.13%	15	\$124.70	2.16%
10	The Fresh Market	9	\$119.40	2.03%	9	\$118.50	2.05%
		310	\$5,779.90	98.48%	309	\$5,683.40	98.42%

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 \$5.87 billion.

Source: Food World, June 2026



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Richmond-Norfolk Market Leaders

- Alternates Share Now 52%
- WM Leads, IDs Very Strong
- C-Stores Share Is 12.5%
- CVS Gains Despite Closures
- 7-Eleven Operates 373 C-Stores

Rank	Company	2026 Stores	2026 Sales (in millions)	% of 2026 Market	2025 Stores	2025 Sales (in millions)	% of 2025 Market
1	Walmart (SC/Neighborhood Mkt)	53	\$2,334.80	17.66%	53	\$2,249.50	17.43%
2	Food Lion	155	\$2,204.50	16.68%	155	\$2,189.20	16.96%
3	Kroger (Marketplace)	37	\$1,429.80	10.82%	37	\$1,404.30	10.88%
4	7-Eleven	373	\$987.80	7.47%	388	\$1,003.10	7.77%
5	CVS	115	\$704.50	5.33%	117	\$646.30	5.01%
6	Wawa	80	\$670.60	5.07%	80	\$647.80	5.02%
7	Harris Teeter	25	\$665.20	5.03%	25	\$649.80	5.03%
8	Walgreens	82	\$556.70	4.21%	84	\$524.50	4.06%
9	Target	26	\$412.90	3.12%	26	\$402.60	3.12%
10	Publix	20	\$345.60	2.61%	20	\$339.40	2.63%
11	Military Commissaries	7	\$341.10	2.58%	7	\$297.50	2.49%
12	Sam's Club	8	\$315.60	2.39%	8	\$305.30	2.37%
13	Aldi	34	\$311.30	2.36%	33	\$287.60	2.23%
14	BJ's Wholesale Club	7	\$293.60	2.22%	7	\$287.40	2.23%
15	Wegmans	4	\$290.50	2.20%	4	\$286.20	2.22%
16	Costco	5	\$256.30	1.94%	5	\$246.80	1.91%
17	Amazon Groc. (Whole Foods)	5	\$160.90	1.22%	5	\$158.60	1.23%
18	Trader Joe's	6	\$127.40	0.96%	6	\$125.10	0.97%
19	Lidl	15	\$125.30	0.95%	15	\$124.70	0.97%
20	The Fresh Market	9	\$119.40	0.90%	9	\$118.50	0.92%
		1,066	\$12,653.80	95.73%	1,084	\$12,252.02	95.41%

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 88. 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 \$13.22 billion.** Source: Food World, June 2026

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Richmond Supermarket Leaders

- Kroger Extends Lead Over FL
- Food Lion Share Dips Slightly
- Publix Up Slightly
- Wegmans Is Per-Store Avg. King
- No Store Growth Among Supers

Rank	Company	2026 Stores	2026 Sales (in millions)	% of 2026 Market	2025 Stores	2025 Sales (in millions)	% of 2025 Market
1	Kroger (Marketplace)	18	\$732.30	32.91%	18	\$709.70	32.45%
2	Food Lion	50	\$685.30	30.80%	50	\$685.80	31.35%
3	Publix	16	\$276.60	12.43%	16	\$271.10	12.39%
4	Wegmans	2	\$139.30	6.26%	2	\$137.50	6.29%
5	Aldi	13	\$109.80	4.93%	13	\$105.20	4.81%
6	International Markets	6	\$60.80	2.73%	6	\$60.10	2.75%
7	Amazon Groc. (Whole Foods)	2	\$49.10	2.21%	2	\$48.30	2.21%
8	Trader Joe's	2	\$44.50	2.00%	2	\$43.60	1.99%
9	The Fresh Market	4	\$44.40	2.00%	4	\$44.10	2.02%
10	Lidl	5	\$41.30	1.86%	5	\$40.50	1.85%
		118	\$2,183.40	98.13%	118	\$2,145.90	98.11%

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 \$2.23 billion.

Source: Food World, June 2026

TRADE CALENDAR

June 28-30

The Summer Fancy Food Show will be held at the Jacob Javits Convention Center in New York City. To register, go to specialty-food.com/fancy-food-shows/summer/register.

July 6-7

Weis Markets will host its annual charity golf outing on courses in the Sunbury, PA area.

July 14

Weaver's of Wellsville will hold a show at the Hershey Auto Museum in Hershey, PA. For more information, call 717.432.4146.

July 19-20

The Ahold Delhaize USA Our Family golf outing will be held July 19 on 11 golf courses throughout Central PA. The pre-golf recognition dinner will be held Sunday at Hershey Lodge and Convention Center - VIP reception begins at 5:00 p.m., followed by networking and dinner at 6:00 p.m., the program at 7:30, and dessert and networking at 8:00 p.m. Dress is business casual. On Monday, breakfast and

registration are from 7:30-9:00 a.m. followed by a shotgun start, scramble format.

August 4-5

Bozzuto's will hold its Big B Expo celebrating America's 250th birthday at Mohegan Sun Resort & Casino in Uncasville, CT. Attendee registration closes July 13, 2026. For for information, or to register, go to bozzutosexpo.com.

August 17-18

C&S Wholesale Grocers will hold its fall selling show at Mohegan Sun Resort & Casino in Uncasville, CT.

October 13-14

The Pennsylvania Food Merchants Association will hold its fall legislative conference at Hershey Country Club. For more information go to pfma.org.

October 14-16

IFPA's Global Produce & Floral show will be held in Orlando.

October 16

MAFTO will hold its fall retail-

er dinner honoring Giant Food's 90th anniversary at the College Park Marriott Hotel & Convention Center in Hyattsville. For more information, or to buy tickets, go to mafto.org.

October 17-20

The NFRA convention will be held at the Gaylord National Resort & Convention Center in National Harbor, MD.

November 4

Saint Joseph's University Academy of Food Marketing will host its Future Food Industry Leaders networking and recruitment reception on campus at Campion Center.

December 2-4

The 17th annual New York Produce Show will be held at the Jacob Javits Convention Center in New York City. To register, go to easternfoodcouncil.com/events.

January 17-20, 2027

Specialty Food Association will host the Winter Fancy Faire at the Moscone Center in San Francisco.

Additional information will be available at specialtyfood.com.

January 20-23, 2027

FMI Midwinter will be held at the Gaylord Pacific in San Diego. More information will be available at fmi.org.

February 1-3, 2027

The NGA Show will be held at the MGM Conference Center in Las Vegas. More information will be available at thengashow.com.

June 6-8, 2027

The IDDBA show will be held in Atlanta. More information will be available at iddba.org.

July 25-27

The Summer Fancy Food Show will be held at the Jacob Javits Convention Center in New York City. More information will be available at specialtyfood.com.

October 17-20, 2027

The NFRA convention will be held at the Marriott Marquis in San Diego. More information will be available at nfrweb.org.

October 14-16, 2027

IFPA's Global Produce & Floral show will be held in Atlanta. More information will be available at freshproduce.com.

If you would like to publish an event in our trade calendar, please send information to pr@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 foodtradenews.com/calendar/ or by scanning the code below.



GREAT BALLS OF FIRE

By Duke Winston

Another Year Of Gridlock In Overstored, Competitive Richmond-Norfolk Market

With so little new store activity, significant concerns about the economy and continued overstoreing, market change in the Richmond and Tidewater markets was almost non-existent.

As with other markets in the Mid-Atlantic, progress was generally measured in comparable store sales gains and most of those gains were made by alternate channel retailers, particularly discounters.

Affordability worries not only impacted consumers in the lower and lower-middle economic strata, but middle and even upper-middle class Americans were even more budget and trade-down conscious, cross-shopping at a higher rate and buying more private label products than ever before.

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

Walmart - Another year of no new store activity, but strong comp store sales helped the "Behemoth" extend its lead in the Richmond market (against Kroger) and tighten the gap on the Tidewater area (vs. Food Lion). Over the next 12 months, Walmart has seven of its 53 R-N units (most of them SuperCenters) scheduled for major remodels. As now-retired CEO Doug McMillon has often said: "Price leadership drives our business." That image and the improvement of operational execution in its stores (still not great, but much better than a decade ago) should keep Walmart atop the leaderboard for a long time.

Kroger - While Kroger held serve in both Richmond and Tidewater, there's a lot going on behind the scenes at the country's largest pure-play food retailer. Starting at the top, the Cincinnati-based chain finally found a new CEO in former Walmart executive Greg Foran, who already said he wants to see Kroger's store fundamentals improve. That's the right answer as operational execution and morale have waned in recent years. Kroger's got great locations in Richmond, decent locations in Tidewater and a solid foundation to compete with combined market leader Walmart, it just has got to execute better. The company's newest store, the \$40 million long-awaited 118,000 square foot replacement store in Mechanicsville finally opened in April and wins Big Duke's "store of the year" honors.

Food Lion - Another steady but unspectacular year (number one in Tidewater, number three in Richmond), but consistency doesn't necessarily mean you can move

See **GREAT BALLS** on page 84

Are You Reaching Your Food & Drug Customers In This \$350 Billion Marketing Area?

Out of Region Companies Receiving FOOD WORLD & FOOD TRADE NEWS:

- Ahold Delhaize, Amsterdam, The Netherlands
- Albertsons Companies, Boise, ID
- Aldi, Batavia, IL
- Amazon, Seattle, WA
- Costco, Issaquah, WA
- Dollar General, Goodlettsville, TN
- 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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GREAT BALLS OF FIRE

from page 83

the market share needle in areas as competitive as those in Central and Eastern Virginia. Certainly, over the past five years the biggest Ahold Delhaize USA brand has improved its perishables offerings, particularly produce, and the Salisbury, NC-based chain has a loyal following. Big Duke wouldn't call Food Lion a discounter (as it was in its early halcyon days), but its pricing strategy is more aggressive than Publix and Kroger but no match for Walmart and Aldi. Once again, another solid performance for Food Lion which enjoys the advantage of covering many small towns and big cities with its 155 supermarkets in the sprawling Richmond-Norfolk combined market.

Harris Teeter - Clearly, Harris Teeter has lost some of its mojo in recent years. Its higher retails could be justified by excellent operational execution and creative merchandising, particularly in its "fresh" departments. However, after COVID many of those assets have waned; being a conventional supermarket chain with a declining point of difference is not a comfortable place to be today. Each year, HT seems to become more "Krogerized," which for a chain that for decades maintained its own identity, isn't a good thing. Big Duke misses the team of Fred Morganthall and Rod Antolock who ran Harris Teeter with passion and pride. Improving Harris Teeter should be on Kroger CEO Foran's priority list.

Publix - Another supermarket chain stuck in the mushy middle. What Publix represents to consumers in its home state, Florida, is not how it's perceived in Virginia. Comps were generally flat, but don't expect Publix to change - they're privately-held (actually, employee-owned) and they make so much money that altering their modus operandi, even when they expand to new markets, is not in their playbook. While the Lakeland, FL-based regional chain didn't open any new stores this year, it will continue to add to its recent Tidewater entry with a new unit planned for Yorktown. Additionally, new Virginia stores are planned to the north and west in Winchester, Stephens City and Manassas.

Aldi - I echo the words of publisher emeritus Jeff Metzger about Aldi: "If we could award a "best in class, small store division" trophy, Aldi would win. Its model is not for all shoppers and it's still tough to buy one's total weekly purchases in a footprint that's typically smaller than 25,000 square feet, but for what it is, Aldi scores very highly. There's enough product diversity to fill most of one's shopping cart and its relationship with its private label vendors is strong, yielding high-quality products. Strong management, excellent store design solid in-store execution and deep corporate pockets make Aldi a top-tier food retailing powerhouse for today and in the future."

Richmond Market Leaders

- Alts. Share Grows To 54.2%
- Strong Comps Extend WM Lead
- C-Stores Control 14.3%
- Club Stores Combined Share: 7.3%
- CVS Closes Store, Still Drug Leader

Rank	Company	2026 Stores	2026 Sales (in millions)	% of 2026 Market	2025 Stores	2025 Sales (in millions)	% of 2025 Market
1	Walmart (SC/Neighborhood Mkt)	17	\$847.40	17.35%	17	\$812.80	17.05%
2	Kroger (Marketplace)	18	\$732.30	14.99%	18	\$709.70	14.88%
3	Food Lion	50	\$685.30	14.03%	50	\$685.80	14.38%
4	CVS	56	\$329.10	6.74%	57	\$304.00	6.38%
5	Wawa	35	\$313.90	6.43%	35	\$308.67	6.47%
6	Publix	16	\$276.60	5.66%	16	\$271.10	5.69%
7	7-Eleven	97	\$270.50	5.54%	96	\$260.00	5.45%
8	Walgreens	30	\$214.50	4.39%	34	\$216.40	4.54%
9	Target	12	\$203.90	4.17%	12	\$198.30	4.16%
10	Wegmans	2	\$139.30	2.85%	2	\$137.50	2.88%
11	BJ's Wholesale Club	3	\$138.80	2.84%	3	\$136.10	2.85%
12	Aldi	13	\$109.80	2.25%	13	\$105.20	2.21%
13	Costco	2	\$108.50	2.22%	2	\$104.40	2.19%
14	Sam's Club	3	\$107.50	2.20%	3	\$104.60	2.19%
15	Sheetz	18	\$69.20	1.42%	18	\$68.70	1.44%
16	International Markets	6	\$60.80	1.24%	6	\$60.10	1.26%
17	Amazon Groc. (Whole Foods)	2	\$49.10	1.01%	2	\$48.30	1.01%
18	Fas-Marts	26	\$44.50	0.91%	26	\$44.50	0.93%
19	Trader Joe's	2	\$44.50	0.91%	2	\$43.60	0.91%
20	Fresh Market	4	\$44.40	0.91%	4	\$44.10	0.92%
		412	\$4,789.90	98.07%	416	\$4,663.87	97.81%

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 88. 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 \$4.88 billion.** Source: Food World, June 2026

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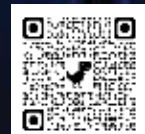
Share your product's story at *Taste of Excellence*, the highly-anticipated opening reception, bringing together the frozen and refrigerated categories. Showcase your brand - limited spots remain - and join us for an evening of connections, food and fun.



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IN REVIEW: CVS

State	County	2026 Stores	2026 Sales (in millions)	2026 County Food Sales	% of 2026 County Market	2025 Stores	2025 Sales (in millions)	% of 2025 County Market
DC	Washington	39	\$420.70	\$2,804.20	15.00%	45	\$441.70	16.23%
DC Recap: 39 stores with sales of \$420.7 million. Total retail food sales for DC in the study: \$2.8 billion. CVS share of DC is 15.0%.								
DE	Kent	3	\$20.60	\$585.40	3.52%	3	\$17.80	3.10%
DE	Sussex	6	\$38.20	\$1,128.50	3.39%	6	\$33.30	2.99%
DE Recap: 9 stores with sales of \$58.8 mmillion. Total retail food sales for DE in the study: \$1.71 billion. CVS share of DE is 3.43%.								
MD	Anne Arundel	22	\$134.10	\$2,635.90	5.09%	22	\$127.20	5.00%
MD	Baltimore City	8	\$69.70	\$1,450.60	4.80%	13	\$99.20	6.52%
MD	Baltimore County	23	\$161.70	\$3,814.40	4.24%	24	\$153.90	4.08%
MD	Calvert	3	\$15.30	\$486.70	3.14%	3	\$15.20	3.38%
MD	Carroll	5	\$32.40	\$755.90	4.29%	5	\$28.40	3.74%
MD	Cecil	1	\$5.30	\$331.90	1.60%	1	\$5.30	1.62%
MD	Charles	7	\$37.90	\$669.20	5.66%	7	\$38.90	6.07%
MD	Frederick	13	\$74.60	\$1,120.20	6.66%	13	\$74.90	6.99%
MD	Harford	8	\$45.20	\$1,222.50	3.70%	8	\$37.40	3.24%
MD	Howard	8	\$43.20	\$1,353.20	3.19%	8	\$41.70	3.12%
MD	Montgomery	42	\$480.60	\$4,304.80	11.16%	43	\$471.60	11.26%
MD	Prince George's	42	\$288.40	\$3,719.30	7.75%	43	\$276.80	7.55%
MD	Queen Anne's	1	\$4.10	\$169.20	2.42%	1	\$3.90	2.33%
MD	St. Mary's	5	\$28.30	\$410.10	6.90%	6	\$31.70	7.92%
MD	Talbot	2	\$8.50	\$237.30	3.58%	2	\$8.40	3.55%
MD	Washington	5	\$18.40	\$634.60	2.90%	6	\$21.70	3.57%
MD	Wicomico	2	\$12.60	\$325.90	3.87%	2	\$8.40	2.56%
MD	Worcester	3	\$23.60	\$259.60	9.09%	3	\$19.70	7.61%
MD Recap: 200 stores with sales of \$1.48 billion. Total retail food sales for MD in the study: \$24.54 billion. CVS share of MD is 6.12%.								
PA	Adams	1	\$6.70	\$231.20	2.90%	1	\$5.80	2.52%
PA	Cumberland	12	\$69.50	\$1,300.10	5.35%	12	\$58.20	4.51%
PA	Dauphin	13	\$82.40	\$1,118.70	7.37%	13	\$69.20	6.10%
PA	Franklin	5	\$30.30	\$546.80	5.54%	5	\$23.50	4.39%
PA	Lancaster	22	\$128.70	\$1,883.20	6.83%	22	\$114.80	6.21%
PA	Lebanon	5	\$36.20	\$489.20	7.40%	5	\$27.60	5.81%
PA	York	11	\$78.30	\$1,826.80	4.29%	12	\$64.20	3.60%
PA Recap: 69 stores with sales of \$432.1 million. Total retail food sales for PA in the study: \$7.52 billion. CVS share of PA is 5.75%.								
VA	Accomack	1	\$5.20	\$110.60	4.70%	1	\$5.10	4.75%
VA	Albemarle	7	\$33.80	\$755.10	4.48%	7	\$30.50	4.09%
VA	Arlington	17	\$121.20	\$1,004.20	12.07%	17	\$118.20	11.40%
VA	Chesapeake City	6	\$46.70	\$1,003.20	4.66%	6	\$44.30	4.44%
VA	Chesterfield	21	\$131.30	\$1,814.30	7.24%	22	\$117.20	6.65%
VA	Culpeper	2	\$7.90	\$197.40	4.00%	2	\$7.80	4.04%
VA	Dinwiddie	1	\$7.10	\$142.60	4.98%	1	\$5.90	4.05%
VA	Fairfax	61	\$369.20	\$6,579.20	5.61%	64	\$365.70	5.75%
VA	Fauquier	1	\$4.70	\$216.80	2.17%	1	\$4.60	2.16%
VA	Frederick	4	\$20.50	\$583.90	3.51%	4	\$20.20	3.60%
VA	Greene	0	\$0.00	\$13.40	0.00%	1	\$4.80	26.82%
VA	Hampton/Newport News	8	\$49.20	\$1,337.30	3.68%	8	\$42.60	3.19%
VA	Hanover	6	\$34.90	\$559.70	6.24%	6	\$34.60	6.35%
VA	Henrico	27	\$150.60	\$2,149.30	7.01%	27	\$141.20	6.71%
VA	Isle of Wight	2	\$14.10	\$112.40	12.54%	2	\$11.60	10.51%
VA	James City	6	\$33.60	\$443.80	7.57%	6	\$32.90	7.49%
VA	King George	1	\$5.30	\$113.10	4.69%	1	\$5.20	4.74%
VA	Lancaster	1	\$4.20	\$79.10	5.31%	1	\$4.00	5.10%

IN REVIEW: CVS

State	County	2026 Stores	2026 Sales (in millions)	2026 County Food Sales	% of 2026 County Market	2025 Stores	2025 Sales (in millions)	% of 2025 County Market
VA	Loudoun	12	\$60.30	\$1,802.60	3.35%	12	\$59.10	3.38%
VA	Louisa	1	\$6.50	\$54.50	11.93%	1	\$6.40	11.83%
VA	Norfolk City	7	\$54.20	\$899.50	6.03%	7	\$48.20	5.50%
VA	Orange	2	\$13.10	\$155.80	8.41%	2	\$12.90	8.39%
VA	Page	1	\$5.40	\$81.80	6.60%	1	\$5.30	6.80%
VA	Portsmouth City	3	\$19.30	\$323.60	5.96%	3	\$17.00	5.56%
VA	Powhatan	1	\$5.20	\$86.00	6.05%	1	\$5.10	6.04%
VA	Prince George	1	\$6.10	\$106.30	5.74%	1	\$4.90	5.05%
VA	Prince William	17	\$91.60	\$2,278.50	4.02%	17	\$89.30	4.02%
VA	Shenandoah	1	\$4.60	\$132.10	3.48%	1	\$4.40	3.39%
VA	Spotsylvania	11	\$71.50	\$900.30	7.94%	12	\$73.40	8.34%
VA	Stafford	7	\$35.80	\$509.70	7.02%	7	\$35.20	7.19%
VA	Suffolk City	1	\$6.70	\$369.70	1.81%	1	\$5.60	1.58%
VA	Virginia Beach	13	\$81.60	\$1,976.80	4.13%	13	\$71.70	3.82%
VA	Warren	2	\$8.50	\$185.20	4.59%	2	\$8.30	4.68%
VA	York	1	\$6.30	\$202.60	3.11%	1	\$4.90	2.45%

VA Recap: 253 stores with sales of \$1.52 billion. Total retail food sales for VA in the study: \$29.09 billion. CVS share of VA is 5.4%.

Mid-Atlantic Recap: 570 stores with sales of \$3.91 billion annually. Mid-Atlantic retail food sales total: \$64.4 billion.

CVS Per Store Average: \$6.86 million

Source: Food World, June 2026

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FOOD WORLD MARKET STUDY 2026: RULES & ANALYSIS

from page 13

Wards Corner neighborhood of Norfolk.

How We Do It

This is the 48th 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, 2025, through March 31, 2026.

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 or alcohol, 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, Grocery Outlet, Save A Lot, Price Rite), military commissaries, Walmart and Target.

In early April, after the 12-month measuring peri-

od 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 commissaries and convenience stores (again, excluding fuel and alcohol).

Based on publicly-available data from Walmart (Sam's Club), Target, Costco and BJ's, whose sales breakouts by department continue 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 94 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 Neigh-

borhood Market store sales. Once again over the past 12 months, Walmart opened no new stores, but plans for the next year call for the "Bentonville Behemoth" to remodel and upgrade 61 stores in *Food World's* marketing area.

At Target, which had another disappointing year (although its most recent Q1 report, which occurred after our measuring period ended, showed improvement), its food/general merchandise extrapolated 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.

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 (an eighth Marketplace in Mechanicsville, VA - a replacement unit for a conventional Kroger - opened after our measuring period had concluded).

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 veteran dream team - dedicated, intelligent, passionate and fun to work with.

Those stalwarts are our three co-publishers - Terri Maloney, VP-editorial director; Maria Maggio, VP-general manager of Food Trade News; and Kevin Gallagher, VP-Metro New York and New England.

As it's been for many years, there's one person who drives this entire process. That's Terri, who organizes and collects much of the data while also overseeing IT, writing, paste-up, proofreading, and pre-press and printer supervision.

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

Our pre-press and graphics team of Jenny Jones and her boss Matt Danielson at E-Ink, who we have partnered with us for 30 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 Mike McBain, Chris Geimer, Tanya Erickson and the entire Evergreen team for their continued good work.

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

This is my 53rd year of reporting about the grocery industry. I'm thankful and humbled that an idea that my late, great partner Dick Bestany and I had in 1978 has blossomed for so long.

But all good things must come to an end, and as many of you know, I sold Best-Met Publishing last August to Alex Wissel. As part of my deal with Alex, I agreed to continue to continue writing my column "Taking Stock" and to pilot the Market Study one final time. That commitment has now been fulfilled and, at age 75, I will be mostly retired, save for a few consulting projects.

Obviously, to achieve such longevity, the contributions of our readers have been invaluable. I also want to acknowledge the important role of our advertisers - without you, we simply wouldn't exist.

As for Best-Met Publishing, I know Alex, the old Best-Met team, and a couple of newcomers - Greg Madison and Janani Ravi - are excited to continue to publish information-based products, both in print and digitally, that remain relevant and interesting to an evolving audience.

Thanks for the good times and wonderful memories - it's been a long and great ride



Jeff Metzger

Publisher Emeritus

Tidewater Supermarket Leaders

- Food Lion Share Is 41%
- No New HT Stores Again
- Kroger Comp Sales Flat
- Publix Coming To Yorktown
- Gridlock In Overstored Region

Rank	Company	2026 Stores	2026 Sales (in millions)	% of 2026 Market	2025 Stores	2025 Sales (in millions)	% of 2025 Market
1	Food Lion	81	\$1,220.20	41.03%	81	\$1,203.20	41.07%
2	Harris Teeter	22	\$585.40	19.69%	22	\$571.70	19.51%
3	Kroger (Marketplace)	16	\$542.30	18.24%	16	\$541.40	18.48%
4	Aldi	19	\$180.60	6.07%	19	\$172.80	5.90%
5	Lidl	9	\$76.80	2.58%	9	\$75.30	2.57%
6	The Fresh Market	5	\$75.00	2.52%	5	\$74.40	2.54%
7	Amazon Groc. (Whole Foods)	2	\$72.70	2.44%	2	\$72.10	2.46%
8	Wegmans	1	\$72.40	2.43%	1	\$71.60	2.44%
9	Publix	4	\$69.00	2.32%	4	\$68.30	2.33%
10	Trader Joe's	3	\$58.90	1.98%	3	\$57.70	1.97%
		162	\$2,953.30	99.31%	162	\$2,908.50	99.28%

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 \$2.97 billion.

Source: Food World, June 2026

Tidewater Market Leaders

- Alts. Share Now At Record 53.8%
- Food Lion Lead Shrinking
- Strong Comps Aid Walmart
- Rite Aid Exit Creates Opportunities
- Commissaries Post Big Gains

Rank	Company	2026 Stores	2026 Sales (in millions)	% of 2026 Market	2025 Stores	2025 Sales (in millions)	% of 2025 Market
1	Food Lion	81	\$1,220.20	17.93%	81	\$1,203.20	18.15%
2	Walmart (SC/Neighborhood Mkt)	29	\$1,180.40	17.35%	29	\$1,134.90	17.12%
3	7-Eleven	249	\$638.50	9.38%	264	\$663.10	10.00%
4	Harris Teeter	22	\$585.40	8.60%	22	\$571.70	8.62%
5	Kroger (Marketplace)	16	\$542.30	7.97%	16	\$541.40	8.17%
6	Wawa	40	\$323.00	4.75%	40	\$305.72	4.61%
7	CVS	47	\$311.70	4.58%	47	\$278.80	4.20%
8	Walgreens	45	\$300.20	4.41%	48	\$264.30	3.99%
9	Military Commissaries	6	\$295.42	4.34%	6	\$265.44	4.01%
10	Aldi	19	\$180.60	2.65%	19	\$172.80	2.61%
11	Sam's Club	4	\$178.20	2.62%	4	\$171.20	2.58%
12	Target	12	\$175.00	2.57%	12	\$171.10	2.58%
13	BJ's Wholesale Club	4	\$154.80	2.27%	4	\$151.30	2.28%
14	Costco	2	\$100.70	1.48%	2	\$97.30	1.47%
15	Lidl	9	\$76.80	1.13%	9	\$75.30	1.14%
16	The Fresh Market	5	\$75.00	1.10%	5	\$74.40	1.12%
17	Amazon Groc. (Whole Foods)	2	\$72.70	1.07%	2	\$72.10	1.09%
18	Wegmans	1	\$72.40	1.06%	1	\$71.60	1.08%
19	Publix	4	\$69.00	1.01%	4	\$68.30	1.03%
20	Trader Joe's	3	\$58.90	0.87%	3	\$57.70	0.87%
		600	\$6,611.22	97.15%	612	\$6,411.66	96.71%

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 88. 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 \$6.81 billion. Source: Food World, June 2026

IN REVIEW: KROGER

State	County	2026 Stores	2026 Sales (in millions)	2026 County Food Sales	% of 2026 County Market	2025 Stores	2025 Sales (in millions)	% of 2025 County Market
VA	Albemarle	3	\$155.20	\$755.10	20.55%	3	\$153.20	20.57%
VA	Chesapeake City (Marketplace)	3	\$125.20	\$1,003.20	12.48%	3	\$131.60	13.19%
VA	Chesterfield (Marketplace)	7	\$300.60	\$1,814.30	16.57%	7	\$286.40	16.25%
VA	Gloucester	1	\$23.10	\$136.10	16.97%	1	\$22.90	16.58%
VA	Hampton/Newport News	1	\$34.70	\$1,337.30	2.59%	1	\$33.90	2.54%
VA	Hanover (Marketplace)	2	\$112.80	\$559.70	20.15%	2	\$109.50	20.11%
VA	Henrico	9	\$318.90	\$2,149.30	14.84%	9	\$313.80	14.92%
VA	Isle Of Wight	1	\$25.30	\$112.40	22.51%	1	\$24.80	22.46%
VA	Portsmouth City (Marketplace)	1	\$45.00	\$323.60	13.91%	1	\$44.60	14.58%
VA	Suffolk City (Marketplace)	2	\$80.80	\$369.70	21.86%	2	\$79.20	22.37%
VA	Virginia Beach (Marketplace)	5	\$162.10	\$1,976.80	8.20%	5	\$158.70	8.46%
VA	York	2	\$46.10	\$202.60	22.75%	2	\$45.70	22.90%

VA Recap: 37 stores with sales of \$1.43 billion. Total retail food sales for VA in the study: \$29.09 billion. Kroger share of VA is 5.09%.

Mid-Atlantic Recap: 37 stores with sales of \$1.43 billion annually. Mid-Atlantic retail food sales total: \$64.4 billion.

Kroger Per Store Average: \$38.64 million () Name in parentheses indicates another banner used by the company.

Source: Food World, June 2026

IN REVIEW: WEGMANS

State	County	2026 Stores	2026 Sales (in millions)	2026 County Food Sales	% of 2026 County Market	2025 Stores	2025 Sales (in millions)	% of 2025 County Market
DC	Washington	1	\$95.20	\$2,804.20	3.39%	1	\$93.70	3.44%
MD	Anne Arundel	1	\$95.80	\$2,635.90	3.63%	1	\$94.10	3.70%
MD	Baltimore County	2	\$183.40	\$3,814.40	4.81%	2	\$179.30	4.75%
MD	Frederick	1	\$78.60	\$1,120.20	7.02%	1	\$77.40	7.22%
MD	Harford	1	\$102.10	\$1,222.50	8.35%	1	\$99.10	8.60%
MD	Howard	1	\$112.90	\$1,353.20	8.34%	1	\$112.50	8.42%
MD	Montgomery	2	\$181.70	\$4,304.80	4.22%	1	\$101.20	2.42%
MD	Prince George's	1	\$101.40	\$3,719.30	2.73%	1	\$99.70	2.72%

MD Recap: 9 stores with sales of \$855.9 million. Total retail food sales for MD in the study: \$24.54 billion. Wegmans share of MD is 3.53%.

PA	Cumberland	1	\$59.80	\$1,300.10	4.60%	1	\$62.00	4.81%
PA	Lancaster	1	\$72.10	\$1,883.20	3.83%	1	\$70.30	3.80%

PA Recap: 3 stores with sales of \$131.9 million. Total retail food sales for PA in study: \$7.53 billion. Wegmans share of PA is 1.75%.

VA	Albemarle	1	\$78.80	\$755.10	10.44%	1	\$77.10	10.35%
VA	Chesterfield	1	\$68.40	\$1,814.30	3.77%	1	\$67.80	3.85%
VA	Fairfax	6	\$656.80	\$6,579.20	9.98%	6	\$642.50	10.11%
VA	Henrico	1	\$70.90	\$2,149.30	3.30%	1	\$69.70	3.31%
VA	Loudoun	2	\$206.90	\$1,802.60	11.48%	2	\$201.30	11.50%
VA	Prince William	2	\$233.30	\$2,278.50	10.24%	2	\$229.60	10.33%
VA	Spotsylvania	1	\$77.90	\$900.30	8.65%	1	\$77.30	8.79%
VA	Virginia Beach	1	\$72.40	\$1,976.80	3.66%	1	\$71.60	3.82%

VA Recap: 15 stores with sales of \$1.47 billion. Total retail food sales for VA in the study: \$29.09 billion. Wegmans share of VA is 3.96%.

Mid-Atlantic Recap: 27 stores with sales of \$2.55 billion annually. Mid-Atlantic retail food sales total: \$64.4 billion.

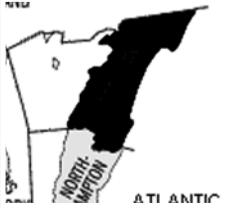
Wegmans Per Store Average: \$94.4 million

Source: Food World, June 2026

VIRGINIA COUNTY SHARE OF MARKET: 2026

Total sales for those Virginia counties included in the study are \$29.09 billion


Rank	Company	Stores	Sales (in millions)	% of Market
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ACCOMACK COUNTY (\$110.6 million)
(Includes Chincoteague)

- Population 33,859
- # of Households 14,446
- Median Income \$58,993
- Under 18 19.8%
- Over 65 27.2%
- Female 50.6%
- White 58.1%
- Black 27.1%
- Hispanic 10.9%
- Asian 0.70%

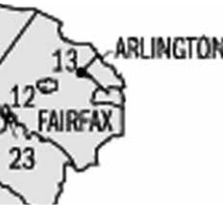
1	Walmart (SuperCenter)	1	\$45.20	40.87%
2	Food Lion	2	\$35.70	32.28%
3	Royal Farm Stores	5	\$13.40	12.12%
4	Fas-Marts	3	\$6.90	6.24%
5	Great Valu	1	\$5.60	5.06%
6	CVS	1	\$5.20	4.7%
		13	\$112.00	101.27%*



ALBEMARLE COUNTY Incl. Charlottesville(\$755.1 million)
(Includes, Keswick, White Hall)

- Population 118,356
- # of Households 45,912
- Median Income \$104,392
- Under 18 19.1%
- Over 65 21.4%
- Female 51.9%
- White 80.6%
- Black 9.5%
- Hispanic 6.4%
- Asian 5.60%


1	Kroger	3	\$155.20	20.55%
2	Harris Teeter	3	\$79.80	10.57%
3	Wegmans	1	\$78.80	10.44%
4	Food Lion	6	\$68.50	9.07%
5	Costco	1	\$47.10	6.24%
6	Walmart (SuperCenter)	1	\$44.70	5.92%
7	Amazon Groc. (Whole Foods)	1	\$39.10	5.18%
8	Giant Food	1	\$37.60	4.98%
9	CVS	7	\$33.80	4.48%
10	Sam's Club	1	\$29.90	3.96%
11	7-Eleven	9	\$25.80	3.42%
12	Trader Joe's	1	\$24.00	3.18%
13	Aldi	2	\$20.90	2.77%
14	Target	1	\$16.90	2.24%
15	Wawa	3	\$16.90	2.24%
16	Fas-Marts	7	\$14.50	1.92%
17	Walgreens	1	\$7.40	0.98%
18	Lidl	1	\$7.20	0.95%
19	Sheetz	1	\$5.60	0.74%
20	Great Valu	0	\$0.00	0.0%
		51	\$753.70	99.81%



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

- Population 243,931
- # of Households 112,027
- Median Income \$142,114
- Under 18 17.7%
- Over 65 12.5%
- Female 49.7%
- White 58.9%
- Black 9.2%
- Hispanic 15.1%
- Asian 10.90%


1	Harris Teeter	4	\$232.50	23.15%
2	CVS	17	\$121.20	12.07%
3	Giant Food	3	\$105.10	10.47%
4	Costco	1	\$86.20	8.58%
5	Albertsons (Balducci's/Safeway)	4	\$82.90	8.26%
6	7-Eleven	28	\$79.10	7.88%
7	Target	3	\$64.10	6.38%
8	Amazon Groc. (WFM/Daily Shop)	3	\$61.80	6.15%
9	Military Commissaries	1	\$57.46	5.72%
10	Trader Joe's	1	\$37.70	3.75%
11	Walgreens	4	\$32.60	3.25%
12	MOM's Organic Market	1	\$16.80	1.67%
13	International Markets	1	\$14.30	1.42%
14	Lidl	1	\$9.90	0.99%
		72	\$1,001.66	99.75%



CAROLINE COUNTY (\$35.1 million)
(Includes Bowling Green)

- Population 34,509
- # of Households 11,988
- Median Income \$87,407
- Under 18 22.6%
- Over 65 17.6%
- Female 50.1%
- White 61.2%
- Black 23.7%
- Hispanic 7.7%
- Asian 1.00%

1	Food Lion	2	\$18.60	52.99%
2	Sheetz	2	\$10.60	30.2%
3	Walgreens	1	\$5.60	15.95%
		5	\$34.80	99.15%



CHARLES CITY COUNTY (\$5.4 million)
(Includes Charles City)

- Population 6,623
- # of Households 2,911
- Median Income \$75,417
- Under 18 13.3%
- Over 65 28.4%
- Female 50.1%
- White 44.9%
- Black 40.5%
- Hispanic 2.1%
- Asian 1.20%

Multi-store retailers do not operate in this county.

See **VIRGINIA COUNTY SHARE** on page 92

VIRGINIA COUNTY SHARE OF MARKET: 2026

Continued from page 91



CHESAPEAKE CITY (\$1.0 billion)

• Population	255,332	• Female	51.0%
• # of Households	94,143	• White	53.8%
• Median Income	\$95,373	• Black	28.5%
• Under 18	23.7%	• Hispanic	7.7%
• Over 65	15.7%	• Asian	3.80%

1	Walmart (SC/Neighborhood Mkt)	6	\$202.10	20.15%
2	Food Lion	12	\$155.70	15.52%
3	Kroger (Marketplace)	3	\$125.20	12.48%
4	7-Eleven	36	\$96.30	9.6%
5	Sam's Club	2	\$86.20	8.59%
6	Harris Teeter	3	\$81.50	8.12%
7	Wawa	6	\$52.10	5.19%
8	CVS	6	\$46.70	4.66%
9	Target	3	\$33.80	3.37%
10	BJ's Wholesale Club	1	\$33.10	3.3%
11	Walgreens	9	\$32.10	3.2%
12	Aldi	3	\$21.20	2.11%
13	MOM's Organic Market	1	\$18.90	1.88%
14	Lidl	1	\$9.30	0.93%
15	Miller Marts	2	\$4.10	0.41%
16	Royal Farm Stores	1	\$4.10	0.41%
		95	\$1,002.40	99.92%



CHESTERFIELD CO. Including Colonial Heights (\$1.8 billion) (Including Chester, Midlothian)

• Population	401,301	• Female	51.7%
• # of Households	140,155	• White	55.0%
• Median Income	\$101,900	• Black	23.0%
• Under 18	23.3%	• Hispanic	11.9%
• Over 65	16.9%	• Asian	3.60%

1	Kroger (Marketplace)	7	\$300.60	16.57%
2	Walmart (SC/Neighborhood Mkt)	6	\$286.50	15.79%
3	Food Lion	17	\$227.30	12.53%
4	Wawa	15	\$143.20	7.89%
5	CVS	21	\$131.30	7.24%
6	7-Eleven	28	\$96.90	5.34%
7	Publix	5	\$86.90	4.79%
8	Walgreens	9	\$71.80	3.96%
9	Target	5	\$71.70	3.95%
10	Wegmans	1	\$68.40	3.77%
11	Sam's Club	2	\$60.30	3.32%
12	Costco	1	\$53.60	2.95%
13	BJ's Wholesale Club	1	\$51.20	2.82%

14	Aldi	6	\$48.20	2.66%
15	Sheetz	9	\$32.80	1.81%
16	Trader Joe's	1	\$23.10	1.27%
17	International Markets	3	\$22.60	1.25%
18	The Fresh Market	2	\$16.90	0.93%
19	Lidl	2	\$15.90	0.88%
20	Royal Farm Stores	1	\$4.70	0.26%
21	Dash-In	1	\$2.80	0.15%
22	Circle K	1	\$2.60	0.14%
		144	\$1,819.30	100.28%*



CLARKE COUNTY (\$12.2 million) (Includes Berryville, Boyce)

• Population	15,609	• Female	50.0%
• # of Households	5,890	• White	82.0%
• Median Income	\$117,111	• Black	4.4%
• Under 18	19.3%	• Hispanic	7.8%
• Over 65	23.7%	• Asian	1.00%

1	Sheetz	1	\$4.70	38.52%
		1	\$4.70	38.52%



CULPEPER COUNTY (\$197.4 million) (Includes Culpeper, Rapidan)

• Population	57,666	• Female	49.9%
• # of Households	18,924	• White	64.35%
• Median Income	\$100,049	• Black	13.7%
• Under 18	24.8%	• Hispanic	17.1%
• Over 65	17.5%	• Asian	1.80%

1	The Giant Co. (Martin's)	1	\$50.70	25.68%
2	Walmart (SuperCenter)	1	\$38.90	19.71%
3	Albertsons (Safeway)	1	\$17.00	8.61%
4	Target	1	\$16.60	8.41%
5	7-Eleven	7	\$15.90	8.05%
6	Weis Markets	1	\$14.32	7.25%
7	Walgreens	2	\$13.50	6.84%
8	Aldi	1	\$11.00	5.57%
9	Lidl	1	\$8.60	4.36%
10	CVS	2	\$7.90	4.0%
		18	\$194.42	98.49%



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

• Population	10,080	• Female	51.9%
• # of Households	4,010	• White	64.0%
• Median Income	\$55,325	• Black	29.0%
• Under 18	19.9%	• Hispanic	2.0%
• Over 65	23.7%	• Asian	1.00%

Multi-store retailers do not operate in this county.

See VIRGINIA COUNTY SHARE on page 94

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VIRGINIA COUNTY SHARE OF MARKET: 2026

Continued from page 92



DINWIDDIE CO. Including PETERSBURG (\$142.6 million) (Includes Dinwiddie, Church Road)

• Population	28,896	• Female	50.6%
• # of Households	10,661	• White	64.4%
• Median Income	\$83,704	• Black	30.6%
• Under 18	19.3%	• Hispanic	4.9%
• Over 65	20.0%	• Asian	0.90%

1	Walmart (SuperCenter)	1	\$52.50	36.82%
2	Food Lion	4	\$40.90	28.68%
3	Walgreens	2	\$12.10	8.49%
4	Wawa	1	\$7.20	5.05%
5	CVS	1	\$7.10	4.98%
6	7-Eleven	2	\$6.60	4.63%
7	International Markets	1	\$6.30	4.42%
8	Sheetz	1	\$5.00	3.51%
9	Fas-Marts	1	\$2.60	1.82%
		14	\$140.30	98.39%



ESSEX COUNTY (\$76.7 million) (Includes Tappahannock)

• Population	10,564	• Female	51.9%
• # of Households	4,447	• White	53.2%
• Median Income	\$56,520	• Black	36.8%
• Under 18	18.0%	• Hispanic	4.6%
• Over 65	25.5%	• Asian	1.00%

1	Walmart (SuperCenter)	1	\$48.90	63.75%
2	Food Lion	1	\$13.10	17.08%
3	Wawa	1	\$5.90	7.69%
4	Sheetz	1	\$4.10	5.35%
5	Fas-Marts	1	\$2.30	3.0%
		5	\$74.30	96.87%



FAIRFAX CO. Including FALLS CHURCH, FAIRFAX, ALEXANDRIA (\$6.6 billion) (Includes McLean, Reston, Springfield)

• Population	1,167,873	• Female	50.1%
• # of Households	414,946	• White	46.0%
• Median Income	\$153,637	• Black	9.0%
• Under 18	22.2%	• Hispanic	17.6%
• Over 65	15.9%	• Asian	20.30%

1	Giant Food	29	\$1,096.30	16.66%
2	Albertsons (Balducci's/Safeway)	27	\$700.40	10.65%
3	Wegmans	6	\$656.80	9.98%

4	International Markets	36	\$517.60	7.87%
5	Costco	4	\$467.30	7.1%
6	Amazon Groc. (Whole Foods)	8	\$425.20	6.46%
7	Harris Teeter	9	\$378.20	5.75%
8	CVS	61	\$369.20	5.61%
9	Walmart (SuperCenter)	8	\$293.40	4.46%
10	7-Eleven	132	\$278.90	4.24%
11	Target	10	\$264.20	4.02%
12	Trader Joe's	8	\$260.30	3.96%
13	Aldi	15	\$172.30	2.62%
14	BJ's Wholesale Club	3	\$152.80	2.32%
15	Walgreens	18	\$133.40	2.03%
16	Military Commissaries	1	\$108.80	1.65%
17	Lidl	10	\$105.30	1.6%
18	MOM's Organic Market	3	\$50.90	0.77%
19	Food Lion	2	\$32.40	0.49%
20	Shoppers	1	\$30.60	0.47%
21	The Fresh Market	2	\$26.30	0.4%
22	Sprouts	1	\$20.80	0.32%
23	Wawa	3	\$17.80	0.27%
24	Sheetz	2	\$9.40	0.14%
25	Grocery Outlet	1	\$5.30	0.08%
26	Dash-In	1	\$2.70	0.04%
		401	\$6,576.60	99.96%



FAUQUIER COUNTY (\$216.8 million) (Includes Remington, Warrenton)

• Population	76,503	• Female	50.2%
• # of Households	26,720	• White	75.0%
• Median Income	\$130,189	• Black	6.0%
• Under 18	23.0%	• Hispanic	12.0%
• Over 65	18.2%	• Asian	2.00%

1	Walmart (SuperCenter)	1	\$43.20	19.93%
2	Giant Food	1	\$34.30	15.82%
3	Food Lion	3	\$25.80	11.9%
4	7-Eleven	7	\$23.70	10.93%
5	Albertsons (Safeway)	1	\$22.40	10.33%
6	Harris Teeter	1	\$20.80	9.59%
7	Sheetz	3	\$13.80	6.37%
8	Walgreens	2	\$11.60	5.35%
9	Wawa	2	\$10.60	4.89%
10	CVS	1	\$4.70	2.17%
11	Royal Farm Stores	1	\$4.60	2.12%
		23	\$215.50	99.4%

See VIRGINIA COUNTY SHARE on page 95

VIRGINIA COUNTY SHARE OF MARKET: 2026

Continued from page 94



FREDERICK COUNTY (\$583.9 million) (Includes Winchester, Stephens City)

- Population 99,955
- # of Households 35,385
- Median Income \$97,606
- Under 18 22.1%
- Over 65 19.7%
- Female 50.0%
- White 79.6%
- Black 4.2%
- Hispanic 12.5%
- Asian 2.00%

1	Walmart (SuperCenter)	3	\$189.40	32.44%
2	The Giant Co. (Martin's)	3	\$178.10	30.5%
3	Costco	1	\$66.20	11.34%
4	Sheetz	7	\$32.50	5.57%
5	Target	2	\$30.30	5.19%
6	CVS	4	\$20.50	3.51%
7	Sharp Shopper	1	\$17.50	3.0%
8	7-Eleven	8	\$14.70	2.52%
9	Walgreens	2	\$11.70	2.0%
10	Aldi	1	\$9.90	1.7%
11	Wawa	1	\$4.80	0.82%
12	Royal Farm Stores	1	\$3.70	0.63%
13	Circle K	1	\$2.30	0.39%
		35	\$581.60	99.61%



GLOUCESTER COUNTY (\$136.1 million) (Includes Gloucester)

- Population 40,097
- # of Households 15,274
- Median Income \$84,306
- Under 18 19.9%
- Over 65 22.5%
- Female 50.3%
- White 87.4%
- Black 8.1%
- Hispanic 4.7%
- Asian 1.10%

1	Walmart (SuperCenter)	1	\$43.40	31.89%
2	Food Lion	2	\$24.50	18.0%
3	Kroger	1	\$23.10	16.97%
4	7-Eleven	7	\$15.90	11.68%
5	Aldi	1	\$12.30	9.04%
6	Wawa	1	\$9.20	6.76%
7	Walgreens	1	\$6.30	4.63%
		14	\$134.70	98.97%



GOOCHLAND COUNTY (\$50.4 million) (Includes Goochland, Manakin)

- Population 29,187
- # of Households 10,342
- Median Income \$118,931
- Under 18 15.8%
- Over 65 28.0%
- Female 51.1%
- White 78.0%
- Black 13.1%
- Hispanic 3.8%
- Asian 1.90%

1	Food Lion	3	\$37.90	74.9%
2	Wawa	1	\$11.80	23.32%
		4	\$49.70	98.22%



GREENE COUNTY (\$50.6 million) (Includes Stanardsville)

- Population 22,103
- # of Households 8,032
- Median Income \$89,808
- Under 18 22.3%
- Over 65 20.3%
- Female 51.1%
- White 79.0%
- Black 7.3%
- Hispanic 8.4%
- Asian 2.2%

1	Food Lion	1	\$11.20	83.58%
		1	\$11.20	83.58%



HAMPTON/NEWPORT NEWS CITY (\$1.3 billion)

- Population 320,545
- # of Households 133,216
- Median Income \$69,628
- Under 18 22.5%
- Over 65 16.2%
- Female 51.6%
- White 40.6%
- Black 45.7%
- Hispanic 8.9%
- Asian 2.8%

1	Food Lion	16	\$320.10	23.94%
2	Walmart (SC/Neighborhood Mkt)	5	\$193.80	14.49%
3	7-Eleven	56	\$153.10	11.45%
4	Military Commissaries	2	\$102.83	7.69%
5	Wawa	7	\$60.80	4.55%
6	Walgreens	7	\$59.20	4.43%
7	CVS	8	\$49.20	3.68%
8	Costco	1	\$44.90	3.36%
9	Harris Teeter	2	\$44.10	3.3%
10	Sam's Club	1	\$42.90	3.21%
11	BJ's Wholesale Club	1	\$42.50	3.18%
12	Kroger	1	\$34.70	2.59%
13	Amazon Groc. (Whole Foods)	1	\$33.60	2.51%
14	Target	2	\$30.40	2.27%
15	Aldi	3	\$28.30	2.12%
16	Lidl	2	\$19.10	1.43%
17	Trader Joe's	1	\$17.90	1.34%
18	The Fresh Market	1	\$13.60	1.02%
19	International Markets	1	\$12.90	0.96%
20	Miller Marts	1	\$4.20	0.31%
21	Royal Farm Stores	1	\$4.20	0.31%
		120	\$1,312.33	98.13%

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HANOVER COUNTY (\$559.7 million) (Includes Ashland, Mechanicsville)

• Population	116,423	• Female	50.5%
• # of Households	42,700	• White	80.0%
• Median Income	\$113,349	• Black	8.3%
• Under 18	21.2%	• Hispanic	4.0%
• Over 65	20.2%	• Asian	2.1%

1	Walmart (SC/Neighborhood Mkt)	3	\$130.10	23.24%
2	Kroger (Marketplace)	2	\$112.80	20.15%
3	Food Lion	6	\$78.80	14.08%
4	Wawa	5	\$38.90	6.95%
5	BJ's Wholesale Club	1	\$38.60	6.9%
6	CVS	6	\$34.90	6.24%
7	7-Eleven	9	\$28.90	5.16%
8	Target	1	\$18.50	3.31%
9	Publix	1	\$18.10	3.23%
10	Walgreens	3	\$17.10	3.06%
11	Fas-Mart's	7	\$12.30	2.2%
12	Sheetz	3	\$11.00	1.97%
13	Aldi	1	\$10.10	1.8%
14	Dash-In	2	\$5.60	1.0%
15	Circle K	1	\$2.20	0.39%
		51	\$557.90	99.68%



HENRICO COUNTY Including RICHMOND CITY (\$2.1 billion) (Includes Highland Springs, Sandston)

• Population	577,539	• Female	52.4%
• # of Households	239,111	• White	50.5%
• Median Income	\$75,662	• Black	29.1%
• Under 18	21.3%	• Hispanic	6.9%
• Over 65	17.8%	• Asian	9.4%

1	Walmart (SC/Neighborhood Mkt)	6	\$333.20	15.5%
2	Kroger (Marketplace)	9	\$318.90	14.84%
3	Food Lion	14	\$219.20	10.2%
4	Publix	10	\$171.60	7.98%
5	CVS	27	\$150.60	7.01%
6	7-Eleven	57	\$134.30	6.25%
7	Target	6	\$113.70	5.29%
8	Wawa	13	\$112.80	5.25%
9	Walgreens	14	\$102.80	4.78%
10	Wegmans	1	\$70.90	3.3%
11	Costco	1	\$54.90	2.55%
12	Aldi	6	\$51.50	2.4%
13	Amazon Groc. (Whole Foods)	2	\$49.10	2.28%

14	BJ's Wholesale Club	1	\$49.00	2.28%
15	Sam's Club	1	\$47.20	2.2%
16	International Markets	2	\$31.90	1.48%
17	The Fresh Market	2	\$27.50	1.28%
18	Lidl	3	\$25.40	1.18%
19	Fas-Mart's	16	\$23.50	1.09%
20	Trader Joe's	1	\$21.40	1.0%
21	Sheetz	3	\$11.70	0.54%
22	Save A Lot	2	\$8.70	0.4%
23	Royal Farm Stores	2	\$8.50	0.4%
24	Dash-In	2	\$5.20	0.24%
25	Miller Marts	1	\$2.60	0.12%
		202	\$2,146.10	99.85%



ISLE OF WIGHT COUNTY (\$112.4 million) (Includes Smithfield)

• Population	41,321	• Female	50.3%
• # of Households	15,756	• White	68.4%
• Median Income	\$95,241	• Black	21.3%
• Under 18	21.1%	• Hispanic	4.1%
• Over 65	21.2%	• Asian	1.2%

1	Food Lion	3	\$36.20	32.21%
2	Kroger	1	\$25.30	22.51%
3	Publix	1	\$18.40	16.37%
4	CVS	2	\$14.10	12.54%
5	7-Eleven	3	\$9.80	8.72%
6	Royal Farm Stores	2	\$7.80	6.94%
		12	\$111.60	99.29%



JAMES CITY CO. Including WILLIAMSBURG (\$443.8 million) (Includes Norge, Toano)

• Population	83,326	• Female	51.6%
• # of Households	33,857	• White	78.2%
• Median Income	\$109,985	• Black	14.6%
• Under 18	19.4%	• Hispanic	7.6%
• Over 65	27.9%	• Asian	3.1%

1	Harris Teeter	3	\$115.20	25.96%
2	Walmart (SC/Neighborhood Mkt)	2	\$86.60	19.51%
3	Food Lion	5	\$64.30	14.49%
4	CVS	6	\$33.60	7.57%
5	Target	2	\$28.10	6.33%
6	7-Eleven	12	\$27.90	6.29%
7	Trader Joe's	1	\$20.20	4.55%
8	Publix	1	\$14.70	3.31%
9	The Fresh Market	1	\$14.50	3.27%
10	Wawa	3	\$13.50	3.04%
11	Aldi	1	\$9.90	2.23%

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12	Walgreens	1	\$7.70	1.74%
13	Fas-Marts	2	\$5.40	1.22%
		40	\$441.60	99.5%



KING & QUEEN COUNTY (\$6.2 million) (Includes King & Queen Courthouse)

• Population	6,743	• Female	49.5%
• # of Households	3,003	• White	69.2%
• Median Income	\$70,469	• Black	24.3%
• Under 18	17.3%	• Hispanic	3.6%
• Over 65	25.2%	• Asian	0.62%

Multi-store retailers do not operate in this county.



KING GEORGE COUNTY (\$113.1 million) (Includes King George)

• Population	29,646	• Female	49.1%
• # of Households	10,133	• White	68.8%
• Median Income	\$116,884	• Black	14.9%
• Under 18	23.9%	• Hispanic	6.69%
• Over 65	15.1%	• Asian	1.0%

1	Walmart (SuperCenter)	1	\$42.30	37.4%
2	Food Lion	2	\$28.80	25.46%
3	Sheetz	3	\$14.10	12.47%
4	Wawa	1	\$7.60	6.72%
5	Fas-Marts	1	\$5.40	4.77%
6	CVS	1	\$5.30	4.69%
7	7-Eleven	2	\$4.20	3.71%
8	Military Commissaries	1	\$3.91	3.46%
		12	\$111.61	98.68%



KING WILLIAM COUNTY (\$40.4 million) (Includes West Point)

• Population	19,617	• Female	50.4%
• # of Households	7,352	• White	79.1%
• Median Income	\$86,056	• Black	15.0%
• Under 18	22.2%	• Hispanic	3.0%
• Over 65	17.6%	• Asian	1.0%

1	Food Lion	2	\$32.30	79.95%
2	7-Eleven	2	\$5.00	12.37%
3	Fas-Marts	1	\$2.50	6.19%
		5	\$39.80	98.51%



LANCASTER COUNTY (\$79.1 million) (Includes Kilmarnock)

• Population	10,995	• Female	52.7%
• # of Households	5,701	• White	70.3%
• Median Income	\$69,713	• Black	26.3%
• Under 18	14.9%	• Hispanic	2.3%
• Over 65	39.1%	• Asian	0.98%

1	Walmart (SuperCenter)	1	\$44.20	55.88%
2	Food Lion	1	\$16.20	20.48%
3	Walgreens	1	\$6.30	7.96%
4	CVS	1	\$4.20	5.31%
5	7-Eleven	1	\$3.20	4.05%
6	Fas-Marts	1	\$2.70	3.41%
		6	\$76.80	97.09%



LOUDOUN COUNTY (\$1.8 billion) (Includes Ashburn, Leesburg, Sterling)

• Population	455,193	• Female	50.0%
• # of Households	148,127	• White	52.73%
• Median Income	\$172,042	• Black	7.72%
• Under 18	27.11%	• Hispanic	14.26%
• Over 65	10.37%	• Asian	21.83%

1	Giant Food	8	\$266.70	14.8%
2	Harris Teeter	9	\$255.70	14.19%
3	Wegmans	2	\$206.90	11.48%
4	Costco	2	\$200.30	11.11%
5	Walmart (SuperCenter)	3	\$144.60	8.02%
6	Target (Super Target)	4	\$90.30	5.01%
7	7-Eleven	36	\$80.30	4.45%
8	International Markets	4	\$75.10	4.17%
9	Walgreens	11	\$63.10	3.5%
10	Albertsons (Safeway)	4	\$61.20	3.4%
11	CVS	12	\$60.30	3.35%
12	Aldi	4	\$46.20	2.56%
13	Sam's Club	1	\$44.10	2.45%
14	Trader Joe's	2	\$42.10	2.34%
15	Food Lion	3	\$41.90	2.32%
16	Amazon Groc. (Whole Foods)	1	\$36.10	2.0%
17	Sheetz	7	\$34.00	1.89%
18	Lidl	3	\$25.40	1.41%
19	Sprouts	1	\$16.70	0.93%
20	Wawa	2	\$14.60	0.81%
21	Royal Farm Stores	2	\$5.70	0.32%
22	Circle K	1	\$2.30	0.13%
		122	\$1,813.60	100.61%*

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LOUISA COUNTY (\$54.5 million) (Includes Louisa, Mineral)

- Population 42,418
- # of Households 15,561
- Median Income \$86,689
- Under 18 19.8%
- Over 65 21.9%
- Female 50.2%
- White 77.6%
- Black 13.9%
- Hispanic 4.6%
- Asian 0.8%

1	Food Lion	2	\$23.80	43.67%
2	Sheetz	2	\$10.50	19.27%
3	CVS	1	\$6.50	11.93%
4	7-Eleven	2	\$6.20	11.38%
5	Walgreens	1	\$5.90	10.83%
		8	\$52.90	97.06%



MADISON COUNTY (\$18.6 million) (Includes Madison)

- Population 14,012
- # of Households 5,482
- Median Income \$84,323
- Under 18 19.7%
- Over 65 24.6%
- Female 51.3%
- White 84.0%
- Black 9.0%
- Hispanic 4.0%
- Asian 0.32%

1	Food Lion	1	\$15.20	81.72%
2	7-Eleven	1	\$3.30	17.74%
		2	\$18.50	99.46%



MATHEWS COUNTY (\$18.3 million) (Includes Mathews)

- Population 8,322
- # of Households 3,987
- Median Income \$75,880
- Under 18 15.7%
- Over 65 33.3%
- Female 50.4%
- White 84.6%
- Black 9.7%
- Hispanic 2.7%
- Asian 0.9%

1	Food Lion	1	\$15.50	84.7%
2	7-Eleven	1	\$2.70	14.75%
		2	\$18.20	99.45%



MIDDLESEX COUNTY (\$29.5 million) (Includes Urbanna)

- Population 10,841
- # of Households 4,772
- Median Income \$75,060
- Under 18 16.8%
- Over 65 34.1%
- Female 50.7%
- White 79.3%
- Black 15.1%
- Hispanic 2.1%
- Asian 1.2%

1	Food Lion	1	\$15.60	52.88%
2	7-Eleven	4	\$12.30	41.69%
		5	\$27.90	94.58%



NEW KENT COUNTY (\$76.4 million) (Includes New Kent, Providence, Forge)

- Population 28,022
- # of Households 9,263
- Median Income \$123,314
- Under 18 19.4%
- Over 65 19.3%
- Female 48.2%
- White 75.2%
- Black 13.2%
- Hispanic 3.8%
- Asian 1.3%

1	Food Lion	4	\$55.70	72.91%
2	Walgreens	2	\$10.70	14.01%
3	Fas-Marts	2	\$6.10	7.98%
4	7-Eleven	1	\$3.80	4.97%
		9	\$76.30	99.87%



NORFOLK CITY (\$899.5 million)

- Population 231,013
- # of Households 94,965
- Median Income \$65,797
- Under 18 20.1%
- Over 65 14.0%
- Female 49.5%
- White 44.0%
- Black 39.8%
- Hispanic 10.1%
- Asian 3.7%


1	Walmart (SC/Neighborhood Mkt)	4	\$196.50	21.85%
2	Food Lion	8	\$153.60	17.08%
3	7-Eleven	35	\$90.20	10.03%
4	Harris Teeter	3	\$74.80	8.32%
5	Costco	1	\$55.80	6.2%
6	CVS	7	\$54.20	6.03%
7	Walgreens	6	\$51.00	5.67%
8	Wawa	6	\$50.30	5.59%
9	Military Commissaries	1	\$48.72	5.42%
10	BJ's Wholesale Club	1	\$33.10	3.68%
11	Aldi	3	\$27.40	3.05%
12	The Fresh Market	1	\$18.70	2.08%
13	Target	1	\$15.50	1.72%
14	Lidl	1	\$9.70	1.08%
15	Royal Farm Stores	2	\$7.90	0.88%
16	Save A Lot	1	\$5.20	0.58%
17	Miller Marts	2	\$4.30	0.48%
		83	\$896.92	99.71%

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4	CVS	2	\$13.10	8.41%
5	Sheetz	2	\$9.70	6.23%
6	7-Eleven	2	\$5.10	3.27%
7	Fas-Marts	1	\$2.90	1.86%
		13	\$157.70	101.22%*



PAGE COUNTY (\$81.8 million)
(Includes Elgin, Luray)

- Population 23,762
- # of Households 9,911
- Median Income \$57,037
- Under 18 19.2%
- Over 65 23.0%
- Female 50.4%
- White 94.4%
- Black 2.4%
- Hispanic 3.0%
- Asian 0.6%


1	Walmart (SuperCenter)	1	\$48.70	59.54%
2	Food Lion	2	\$12.50	15.28%
3	7-Eleven	3	\$10.30	12.59%
4	CVS	1	\$5.40	6.6%
5	Circle K	1	\$3.10	3.79%
		8	\$80.00	97.8%



PORTSMOUTH CITY (\$323.6 million)

- Population 96,777
- # of Households 40,288
- Median Income \$60,491
- Under 18 22.7%
- Over 65 16.0%
- Female 52.1%
- White 36.2%
- Black 50%
- Hispanic 6.8%
- Asian 1.7%


1	Food Lion	5	\$81.10	25.06%
2	Kroger (Marketplace)	1	\$45.00	13.91%
3	Walmart (SuperCenter)	1	\$37.00	11.43%
4	Military Commissaries	1	\$26.65	8.24%
5	Harris Teeter	1	\$26.20	8.1%
6	7-Eleven	9	\$22.60	6.98%
7	Wawa	3	\$22.40	6.92%
8	CVS	3	\$19.30	5.96%
9	Walgreens	2	\$15.20	4.7%
10	Aldi	1	\$10.20	3.15%
11	Royal Farm Stores	2	\$10.10	3.12%
12	Grocery Outlet	1	\$4.90	1.51%
		30	\$320.65	99.09%



NORTHAMPTON COUNTY (\$44.9 million)
(Includes Cape Charles, Exmore)

- Population 11,879
- # of Households 5,437
- Median Income \$61,632
- Under 18 17.4%
- Over 65 32.1%
- Female 52.7%
- White 65.6%
- Black 30.0%
- Hispanic 9.3%
- Asian 1.1%


1	Food Lion	2	\$23.40	52.12%
2	Fas-Marts	3	\$9.10	20.27%
3	Royal Farm Stores	2	\$6.70	14.92%
4	Walgreens	1	\$5.40	12.03%
		8	\$44.60	99.33%



NORTHUMBERLAND COUNTY (\$22.8 million)
(Includes Heathsville)

- Population 11,887
- # of Households 5,640
- Median Income \$66,480
- Under 18 13.6%
- Over 65 38.9%
- Female 50.2%
- White 73.4%
- Black 19.1%
- Hispanic 3.5%
- Asian 0.2%


1	Food Lion	1	\$15.00	65.79%
2	Walgreens	1	\$5.20	22.81%
3	Fas-Marts	1	\$2.50	10.96%
		3	\$22.70	99.56%



NOTTOWAY COUNTY (\$44.6 million)
(Includes Crewe, Nottoway)

- Population 15,796
- # of Households 5,611
- Median Income \$63,261
- Under 18 19.2%
- Over 65 19.2%
- Female 45.6%
- White 54.0%
- Black 36.0%
- Hispanic 5.0%
- Asian 1.0%

1	Walmart	1	\$40.80	91.48%
2	Fas-Marts	1	\$3.20	7.17%
		2	\$44.00	98.65%



ORANGE COUNTY (\$155.8 million)
(Includes Gordonsville, Orange)

- Population 40,083
- # of Households 14,856
- Median Income \$94,008
- Under 18 22.0%
- Over 65 21.1%
- Female 51.1%
- White 81.1%
- Black 13.1%
- Hispanic 7.9%
- Asian 1.3%

1	Walmart (SuperCenter)	2	\$78.00	50.06%
2	Food Lion	3	\$31.80	20.41%
3	Target	1	\$17.10	10.98%

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POWHATAN COUNTY (\$86.0 million) (Includes Powhatan)

• Population	32,591	• Female	48.5%
• # of Households	11,325	• White	84.7%
• Median Income	\$110,537	• Black	7.0%
• Under 18	18.5%	• Hispanic	3.0%
• Over 65	21.2%	• Asian	1.0%

1	Walmart (SuperCenter)	1	\$45.10	52.44%
2	Food Lion	2	\$25.50	29.65%
3	Sheetz	2	\$8.70	10.12%
4	CVS	1	\$5.20	6.05%
		6	\$84.50	98.26%



PRINCE GEORGE CO. Including HOPEWELL (\$106.3 million) (Includes Prince George)

• Population	43,936	• Female	43.8%
• # of Households	12,919	• White	51.4%
• Median Income	\$84,897	• Black	30.9%
• Under 18	19.3%	• Hispanic	10.4%
• Over 65	13.9%	• Asian	1.8%

1	Military Commissaries	1	\$45.68	42.97%
2	Food Lion	2	\$23.30	21.92%
3	Wawa	1	\$10.90	10.25%
4	7-Eleven	3	\$8.90	8.37%
5	Walgreens	1	\$6.70	6.3%
6	CVS	1	\$6.10	5.74%
7	Sheetz	1	\$3.80	3.57%
		10	\$105.38	99.13%



PRINCE WILLIAM CO. Including MANASSAS, MANASSAS PK. (\$2.3 billion) (Includes Dale City, Quantico, Woodbridge)

• Population	502,966	• Female	49.8%
• # of Households	158,395	• White	38.9%
• Median Income	\$129,527	• Black	20.0%
• Under 18	26.6%	• Hispanic	25.7%
• Over 65	10.9%	• Asian	9.7%

1	International Markets	12	\$288.20	12.65%
2	Giant Food	8	\$233.50	10.25%
3	Wegmans	2	\$233.30	10.24%
4	7-Eleven	66	\$199.40	8.75%
5	Walmart (SuperCenter)	5	\$153.20	6.72%
6	Food Lion	9	\$146.20	6.42%
7	Harris Teeter	4	\$140.50	6.17%
8	Costco	2	\$104.20	4.57%
9	Albertsons (Safeway)	4	\$92.80	4.07%

10	CVS	17	\$91.60	4.02%
11	Military Commissaries	1	\$72.04	3.16%
12	BJ's Wholesale Club	2	\$70.40	3.09%
13	Aldi	6	\$68.90	3.02%
14	Target	4	\$68.20	2.99%
15	Walgreens	9	\$62.50	2.74%
16	Lidl	5	\$61.70	2.71%
17	Wawa	8	\$54.50	2.39%
18	Sheetz	11	\$53.20	2.33%
19	Sam's Club	1	\$35.90	1.58%
20	Sprouts	2	\$31.70	1.39%
21	MOM's Organic Market	1	\$14.10	0.62%
		179	\$2,276.04	99.89%



RAPPAHANNOCK COUNTY (\$5.5 million) (Includes Washington)

• Population	7,439	• Female	50.2%
• # of Households	2,985	• White	82.0%
• Median Income	\$83,380	• Black	3.6%
• Under 18	16.5%	• Hispanic	4.8%
• Over 65	30.1%	• Asian	1.0%

Multi-store retailers do not operate in this county.



RICHMOND COUNTY (\$21.9 million) (Includes Elevation, Warsaw)

• Population	9,294	• Female	43.7%
• # of Households	3,177	• White	60.1%
• Median Income	\$66,304	• Black	26.8%
• Under 18	18.2%	• Hispanic	8.4%
• Over 65	21.8%	• Asian	0.7%

1	Food Lion	1	\$15.20	69.41%
2	Walgreens	1	\$4.90	22.37%
		2	\$20.10	91.78%



SHENANDOAH COUNTY (\$129.8 million) (Includes Strasburg, Woodstock)

• Population	45,839	• Female	50.5%
• # of Households	17,962	• White	85.4%
• Median Income	\$72,392	• Black	3.0%
• Under 18	20.6%	• Hispanic	9.1%
• Over 65	22.8%	• Asian	1.2%

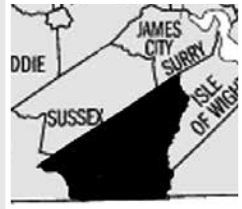
1	Food Lion	3	\$46.10	34.9%
2	Walmart (SuperCenter)	1	\$42.90	32.48%
3	7-Eleven	5	\$11.20	8.48%
4	Sheetz	2	\$10.20	7.72%
5	Walgreens	2	\$9.50	7.19%
6	Circle K	2	\$5.50	4.16%

See **VIRGINIA COUNTY SHARE** on page 101

VIRGINIA COUNTY SHARE OF MARKET: 2026

Continued from page 100

7	CVS	1	\$4.60	3.48%
		16	\$130.00	98.41%



SOUTHAMPTON COUNTY (\$89.8 million) (Includes Franklbn City, Courtland)

• Population	17,669	• Female	48.0%
• # of Households	6,868	• White	60.4%
• Median Income	\$70,795	• Black	29.2%
• Under 18	17.8%	• Hispanic	2.5%
• Over 65	23.3%	• Asian	0.8%

1	Walmart (SuperCenter)	1	\$50.40	56.12%
2	Food Lion	2	\$31.20	34.74%
3	7-Eleven	2	\$5.20	5.79%
		5	\$86.80	96.66%



SPOTSYLVANIA CO. Including FREDERICKSBURG (\$900.3 million) (Includes Spotsylvania)

• Population	155,388	• Female	50.4%
• # of Households	52,481	• White	58.0%
• Median Income	\$112,738	• Black	17.0%
• Under 18	24.0%	• Hispanic	14.8%
• Over 65	15.2%	• Asian	3.0%

1	Walmart (SuperCenter)	4	\$191.20	21.24%
2	Giant Food	2	\$95.80	10.64%
3	Wegmans	1	\$77.90	8.65%
4	Wawa	10	\$73.60	8.18%
5	CVS	11	\$71.50	7.94%
6	Weis Markets	5	\$58.89	6.54%
7	Costco	1	\$41.20	4.58%
8	7-Eleven	13	\$36.90	4.1%
9	Target	2	\$36.90	4.1%
10	BJ's Wholesale Club	1	\$35.70	3.97%
11	Publix	2	\$34.10	3.79%
12	Sheetz	6	\$24.30	2.7%
13	Lidl	2	\$23.10	2.57%
14	Royal Farm Stores	5	\$21.30	2.37%
15	Aldi	3	\$19.70	2.19%
16	Walgreens	2	\$18.60	2.07%
17	Fas-Marts	8	\$14.90	1.66%
18	Food Lion	1	\$13.20	1.47%
		79	\$888.79	98.72%



STAFFORD COUNTY (\$509.7 million) (Includes Aquia, Falmouth, Stafford)

• Population	170,803	• Female	49.5%
• # of Households	52,326	• White	51.4%
• Median Income	\$137,807	• Black	19.3%
• Under 18	26.2%	• Hispanic	16.6%
• Over 65	11.1%	• Asian	4.0%

1	Giant Food	3	\$133.10	26.11%
2	Walmart (SuperCenter)	2	\$77.20	15.15%
3	Wawa	8	\$57.20	11.22%
4	7-Eleven	14	\$42.10	8.26%
5	Target	2	\$39.90	7.83%
6	Weis Markets	3	\$36.09	7.08%
7	CVS	7	\$35.80	7.02%
8	Shoppers	1	\$25.30	4.96%
9	Sheetz	2	\$24.20	4.75%
10	Publix	1	\$17.90	3.51%
11	Aldi	1	\$9.90	1.94%
12	Walgreens	1	\$4.90	0.96%
13	Fas-Marts	1	\$3.10	0.61%
		46	\$506.69	99.41%



SUFFOLK CITY \$369.7 million)

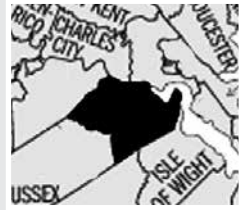
• Population	104,699	• Female	51.4%
• # of Households	40,458	• White	47.5%
• Median Income	\$93,557	• Black	42.0%
• Under 18	23.4%	• Hispanic	5.2%
• Over 65	15.9%	• Asian	1.9%

1	Walmart (SuperCenter)	2	\$87.10	23.56%
2	Kroger (Marketplace)	2	\$80.80	21.86%
3	Food Lion	5	\$53.40	14.44%
4	7-Eleven	11	\$31.20	8.44%
5	Harris Teeter	1	\$29.40	7.95%
6	Walgreens	3	\$18.90	5.11%
7	Publix	1	\$16.60	4.49%
8	Aldi	1	\$13.80	3.73%
9	Lidl	1	\$9.40	2.54%
10	Wawa	2	\$8.80	2.38%
11	CVS	1	\$6.70	1.81%
12	Royal Farm Stores	1	\$4.50	1.22%
13	Miller Marts	2	\$4.30	1.16%
		33	\$364.90	98.7%

See VIRGINIA COUNTY SHARE on page 102

VIRGINIA COUNTY SHARE OF MARKET: 2026

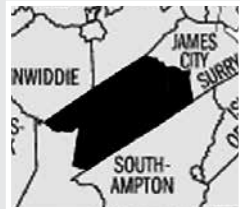
Continued from page 101



SURRY COUNTY (\$3.2 million) (Includes Surry)

• Population	6,603	• Female	49.8%
• # of Households	2,830	• White	53.9%
• Median Income	\$78,041	• Black	39.0%
• Under 18	17.2%	• Hispanic	2.3%
• Over 65	26.9%	• Asian	0.14%

1	7-Eleven	1	\$2.60	81.25%
		1	\$2.60	81.25%



SUSSEX COUNTY (\$6.9 million) (Includes Sussex, Wakefield)

• Population	10,755	• Female	42.1%
• # of Households	3,785	• White	40.7%
• Median Income	\$63,530	• Black	52.8%
• Under 18	16.1%	• Hispanic	1.0%
• Over 65	19.9%	• Asian	0.1%

1	7-Eleven	2	\$6.80	98.55%
		2	\$6.80	98.55%



VIRGINIA BEACH CITY (\$2.0 billion)

• Population	453,737	• Female	51.1%
• # of Households	179,851	• White	61.62%
• Median Income	\$92,968	• Black	18.9%
• Under 18	21.4%	• Hispanic	9.75%
• Over 65	17.1%	• Asian	7.25%

1	Walmart (SC/Neighborhood Mkt)	7	\$284.80	14.41%
2	Food Lion	21	\$279.40	14.13%
3	Harris Teeter	9	\$214.20	10.84%
4	7-Eleven	77	\$182.40	9.23%
5	Kroger (Marketplace)	5	\$162.10	8.2%
6	Military Commissaries	2	\$117.22	5.93%
7	Walgreens	14	\$94.60	4.79%
8	Wawa	10	\$87.30	4.42%
9	CVS	13	\$81.60	4.13%
10	Wegmans	1	\$72.40	3.66%
11	Target	4	\$67.20	3.4%
12	Aldi	6	\$57.50	2.91%
13	Sam's Club	1	\$49.10	2.48%
14	BJ's Wholesale Club	1	\$46.10	2.33%
15	Amazon Groc. (Whole Foods)	1	\$39.10	1.98%
16	International Markets	2	\$31.70	1.6%
17	Lidl	4	\$29.30	1.48%

18	The Fresh Market	2	\$28.20	1.43%
19	Trader Joe's	1	\$20.80	1.05%
20	Publix	1	\$19.30	0.98%
21	Royal Farm Stores	2	\$10.20	0.52%
22	Grocery Outlet	1	\$5.40	0.27%
23	Miller Marts	2	\$4.40	0.22%
		187	\$1,984.32	100.38%*



WARREN COUNTY (\$185.2 million) (Includes Front Royal)

• Population	42,740	• Female	49.4%
• # of Households	15,339	• White	88.6%
• Median Income	\$84,682	• Black	5.5%
• Under 18	21.6%	• Hispanic	8.7%
• Over 65	17.9%	• Asian	1.6%

1	The Giant Co. (Martin's)	1	\$68.10	36.77%
2	Walmart (SuperCenter)	1	\$49.90	26.94%
3	Target	1	\$18.90	10.21%
4	7-Eleven	8	\$18.40	9.94%
5	Aldi	1	\$9.20	4.97%
6	CVS	2	\$8.50	4.59%
7	Sheetz	1	\$5.30	2.86%
8	Royal Farm Stores	1	\$2.70	1.46%
9	Circle K	1	\$2.30	1.24%
		17	\$183.30	98.97%



WESTMORELAND COUNTY (\$55.8 million) (Includes Colonial Beach)

• Population	19,715	• Female	50.4%
• # of Households	8,149	• White	62.3%
• Median Income	\$63,398	• Black	23.2%
• Under 18	17.7%	• Hispanic	6.4%
• Over 65	28.2%	• Asian	1.0%

1	Food Lion	2	\$29.10	52.15%
2	Walgreens	2	\$9.90	17.74%
3	7-Eleven	2	\$6.60	11.83%
4	Great Valu	1	\$6.40	11.47%
5	Fas-Marts	1	\$2.60	4.66%
		8	\$54.60	97.85%

See VIRGINIA COUNTY SHARE on page 103

VIRGINIA COUNTY SHARE OF MARKET: 2026

Continued from page 102

5	Walgreens	2	\$15.20	7.5%
6	7-Eleven	3	\$9.10	4.49%
7	CVS	1	\$6.30	3.11%
8	Royal Farm Stores	1	\$3.70	1.83%
		16	\$200.00	98.72%

() 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 2026



YORK COUNTY Including POQUOSON (\$202.6 million) (Includes Yorktown)

• Population	71,374	• Female	50.3%
• # of Households	27,000	• White	73.2%
• Median Income	\$109,956	• Black	14.6%
• Under 18	22.4%	• Hispanic	8.1%
• Over 65	18.4%	• Asian	6.6%

1	Food Lion	4	\$51.90	25.62%
2	Walmart (SuperCenter)	1	\$49.10	24.23%
3	Kroger	2	\$46.10	22.75%
4	Wawa	2	\$18.60	9.18%

DIRECTORY OF RETAILERS

from page 66

Sprouts

5455 E. High St., Ste. 111
Phoenix, AZ 85054
Phone: (480) 814-8016
Web: sprouts.com
CEO: Jack Sinclair
CFO: Curtis Valentine
Pres./COO: Nick Konat
Chief Cust. Officer: Amanda Rassi
Chief Merch. Officer: Don Clark
Chief Stores Officer: Dustin Hamilton
Chief Dev. Officer: Dave McGlinchey
SVP-Chief Forager.: Kim Coffin
SVP-Supply Chain: Joe Hurley
Primary Supplier: Direct/Kehe
FW Stores: 13
FW Volume: \$239.7 million

Streets Market & Café

2400 14th St. NW
Washington, DC 20009
Phone: (202) 265-3300
Web: streetsmarket.com
Owner: Shin Myong Na
VP: Campbell Burns
Primary Supplier: Bozzuto's
FW Stores: 11
FW Volume: \$94.2 million

Trader Joe's

East Coast Div.
160 Federal St., 12th Fl.
Boston, MA 02108
Phone: (857) 400-3400
Web: traderjoes.com
Chmn./CEO: Bryan Palbaum
Pres./Vice-CEO: Jon Basalone
CFO: Mitch Nadler
DC Reg. VP: Perry Zettersten

NC Reg. VP: Kent Smathers
Supplier: Direct
FW Stores: 36
FW Volume: \$1.02 billion

Wegmans Food Markets, Inc.

1500 Brooks Ave.
PO. Box 30844
Rochester, NY 14603-0844
Phone: (585) 328-2550
Web: wegmans.com
Chmn.: Danny Wegman
Pres./CEO.: Colleen Wegman
Brand Pres.: Nicole Wegman
SVP-Store Ops.: Blaine Forkell
SVP/Div. Mgr.-VA/DE/MD/DC): Bob DiTullio
Primary Supplier: Direct
FW Stores: 27
FW Volume: \$2.55 billion

Weis Markets, Inc.

1000 S. 2nd St.
Sunbury, PA 17801
Phone: (570) 286-4571
Web: weismarkets.com
Chmn./Pres./CEO: Jonathan Weis
COO: Bob Gleeson
SVP/CFO/Treasurer: Michael Lockhard
SVP-HR: Jim Marcil
SVP-Operations: David Gose
SVP/CIO: Greg Zeh
VP-Fresh: Doug Becker
VP-Center Store: Mike Gross
Primary Supplier: Direct
FW Stores: 107
FW Volume: \$2.26 billion

DRUG STORES

CVS Caremark

One CVS Dr.
Woonsocket, RI 02895
Phone: (401) 765-1500
Web: cvs.com
Pres./CEO: David Joyner
EVP/Chief People Officer: Heidi Capozzi
EVP/CFO: Brian Newman
EVP/Group Pres.: Prem Shah
Reg. Stores: 570
Reg. Volume: \$3.91 billion
**Includes both stand-alone stores and pharmacies within Target locations.*

Walgreens

200 Wilmot Rd.
Deerfield, IL 60015
Phone: (847) 914-2500
Web: walgreens.com
CEO: Mike Motz
Exec. Chmn.: John Lederer
FW Stores: 289
FW Volume: \$1.95 billion

CONVENIENCE STORES

7-Eleven

3200 Hackberry Rd.
Irving, TX 75063
Phone: (800) 255-0711
Web: 7-eleven.com
President/Interim CEO: Stan Reynolds
EVP/COO: Doug Rosencrans
EVP/Chief People, Sustainability Officer: Treasa Bowers
EVP/Chief Digital, Information Officer: Raghu Mahadevan

Primary Supplier: McLane
FW Stores: 1,130
FW Volume: \$3.03 billion

Circle K Convenience Stores, Inc.

Div. of Couche-Tard
1130 West Warner Road
Tempe, AZ 85284
Phone: 1-855-276-1947
Southeast Regional Office
1100 Situs Court, Ste 100
Raleigh, NC 27606
Phone: (919) 774-6700
Web: circlek.com
Pres./CEO Alex Miller
SVP-Eastern US: Brian Bednarz
FW Stores: 15
FW Volume: \$38.1 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
FW Stores: 49
FW Volume: \$112.7 million

Fas Mart/Shore Shop Stores

Div. of GPM Investments
8565 Magellan Pkwy., Ste. 400
Richmond, VA 23227
Phone: (804) 730-1568
Web: gpminvestments.com
CEO: Arie Kotler
Primary Supplier: McLane

See **DIRECTORY** on page 106

IN REVIEW: WALGREENS

State	County	2026 Stores	2026 Sales (in millions)	2026 County Food Sales	% of 2026 County Market	2025 Stores	2025 Sales (in millions)	% of 2025 County Market
DC	Washington	9	\$76.30	\$2,804.20	2.72%	11	\$88.70	3.26%
DC Recap: 9 stores with sales of \$76.3 million. Total retail food sales for DC in the study: \$2.8 billion. Walgreens share of DC is 2.72%.								
DE	Kent	8	\$49.50	\$585.40	8.46%	8	\$41.60	7.24%
DE	Sussex	12	\$85.20	\$1,128.50	7.55%	13	\$76.10	6.83%
DE Recap: 20 stores with sales of \$134.7 million. Total retail food sales for DE in the study: \$1.71 billion. Walgreens share of DE is 7.86%.								
MD	Anne Arundel	15	\$66.70	\$2,635.90	2.53%	16	\$63.60	2.50%
MD	Baltimore City	12	\$101.70	\$1,450.60	7.01%	12	\$90.60	5.96%
MD	Baltimore County	23	\$175.40	\$3,814.40	4.60%	25	\$166.30	4.41%
MD	Calvert	2	\$14.80	\$486.70	3.04%	2	\$15.70	3.49%
MD	Caroline	1	\$5.90	\$120.80	4.88%	1	\$5.80	5.20%
MD	Carroll	3	\$20.70	\$755.90	2.74%	3	\$18.50	2.44%
MD	Cecil	3	\$13.90	\$331.90	4.19%	3	\$13.80	4.23%
MD	Charles	4	\$21.50	\$669.20	3.21%	4	\$21.80	3.40%
MD	Dorchester	1	\$6.10	\$73.70	8.28%	1	\$5.90	8.19%
MD	Frederick	5	\$29.30	\$1,120.20	2.62%	5	\$28.80	2.69%
MD	Harford	10	\$63.10	\$1,222.50	5.16%	11	\$60.30	5.23%
MD	Howard	4	\$21.60	\$1,353.20	1.60%	4	\$24.10	1.80%
MD	Kent	2	\$22.50	\$112.80	19.95%	2	\$22.30	21.46%
MD	Montgomery	11	\$72.50	\$4,304.80	1.68%	12	\$78.20	1.87%
MD	Prince George's	9	\$63.60	\$3,719.30	1.71%	11	\$69.20	1.89%
MD	Queen Anne's	2	\$13.30	\$169.20	7.86%	2	\$13.10	7.83%
MD	St. Mary's	1	\$4.60	\$410.10	1.12%	1	\$4.80	1.20%
MD	Talbot	1	\$5.60	\$237.30	2.36%	1	\$5.50	2.32%
MD	Washington	7	\$31.90	\$634.60	5.03%	5	\$27.90	4.59%
MD	Wicomico	1	\$7.30	\$325.90	2.24%	2	\$11.40	3.48%
MD	Worcester	1	\$9.20	\$259.60	3.54%	1	\$7.40	2.86%
MD Recap: 118 stores with sales of \$771.2 million. Total retail food sales for MD in the study: \$24.54 billion. Walgreens share of MD is 3.18%.								
PA	Lancaster	1	\$8.10	\$1,883.20	0.43%	1	\$5.80	0.31%
PA	York	3	\$22.40	\$1,826.80	1.23%	3	\$17.80	1.00%
PA Recap: 4 stores with sales of \$30.5 million. Total retail food sales for PA in the study: \$7.52 billion. Walgreens share of PA is 0.41%.								
VA	Albemarle	1	\$7.40	\$755.10	0.98%	1	\$5.60	0.75%
VA	Arlington	4	\$32.60	\$1,004.20	3.25%	4	\$32.10	3.10%
VA	Caroline	1	\$5.60	\$35.10	15.95%	1	\$5.50	18.39%
VA	Chesapeake City	9	\$32.10	\$1,003.20	3.20%	6	\$28.90	2.90%
VA	Chesterfield	9	\$71.80	\$1,814.30	3.96%	10	\$65.80	3.73%
VA	Culpeper	2	\$13.50	\$197.40	6.84%	2	\$13.30	6.89%
VA	Dinwiddie	2	\$12.10	\$142.60	8.49%	4	\$19.90	13.68%
VA	Essex	0	\$0.00	\$76.70	0.00%	1	\$5.60	7.03%
VA	Fairfax	18	\$133.40	\$6,579.20	2.03%	18	\$120.30	1.89%
VA	Fauquier	2	\$11.60	\$216.80	5.35%	2	\$11.40	5.36%
VA	Frederick	2	\$11.70	\$583.90	2.00%	2	\$11.50	2.05%
VA	Gloucester	1	\$6.30	\$136.10	4.63%	1	\$6.20	4.49%
VA	Hampton/Newport News	7	\$59.20	\$1,337.30	4.43%	7	\$50.80	3.81%
VA	Hanover	3	\$17.10	\$559.70	3.06%	3	\$16.80	3.09%
VA	Henrico	14	\$102.80	\$2,149.30	4.78%	15	\$103.40	4.92%
VA	James City	1	\$7.70	\$443.80	1.74%	1	\$7.60	1.73%

IN REVIEW: WALGREENS

State	County	2026 Stores	2026 Sales (in millions)	2026 County Food Sales	% of 2026 County Market	2025 Stores	2025 Sales (in millions)	% of 2025 County Market
VA	Lancaster	1	\$6.30	\$79.10	7.96%	1	\$6.20	7.91%
VA	Loudoun	11	\$63.10	\$1,802.60	3.50%	11	\$61.90	3.54%
VA	Louisa	1	\$5.90	\$54.50	10.83%	1	\$5.80	10.72%
VA	New Kent	2	\$10.70	\$76.40	14.01%	2	\$10.50	14.62%
VA	Norfolk City	6	\$51.00	\$899.50	5.67%	6	\$44.30	5.06%
VA	Northampton	1	\$5.40	\$44.90	12.03%	1	\$5.30	11.91%
VA	Northumberland	1	\$5.20	\$22.80	22.81%	1	\$5.20	22.71%
VA	Portsmouth City	2	\$15.20	\$323.60	4.70%	2	\$13.20	4.32%
VA	Prince George	1	\$6.70	\$106.30	6.30%	1	\$5.10	5.25%
VA	Prince William	9	\$62.50	\$2,278.50	2.74%	9	\$61.80	2.78%
VA	Richmond	1	\$4.90	\$21.90	22.37%	1	\$4.80	19.67%
VA	Shenandoah	2	\$9.50	\$132.10	7.19%	2	\$9.30	7.16%
VA	Spotsylvania	2	\$18.60	\$900.30	2.07%	3	\$22.50	2.56%
VA	Stafford	1	\$4.90	\$509.70	0.96%	1	\$4.70	0.96%
VA	Suffolk City	3	\$18.90	\$369.70	5.11%	3	\$16.10	4.55%
VA	Virginia Beach	14	\$94.60	\$1,976.80	4.79%	14	\$84.20	4.49%
VA	Westmoreland	2	\$9.90	\$55.80	17.74%	2	\$9.70	17.80%
VA	York	2	\$15.20	\$202.60	7.50%	2	\$13.00	6.51%

VA Recap: 138 stores with sales of \$933.4 million. Total retail food sales for VA in the study: \$29.09 billion. Walgreens share of VA is 3.32%.

Mid-Atlantic Recap: 289 stores with sales of \$1.95 billion annually. Mid-Atlantic retail food sales total: \$64.4 billion.

Walgreens Per Store Average: \$6.73 million

Source: Food World, June 2026

We don't tell you which retailers are out of milk,



but we will tell you which ones are out of step.



**Food World.
The news you care about.
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DIRECTORY OF RETAILERS

from page 103

FW Stores: 88
FW Volume: \$175.8 million

High's

Div. of Carroll Independent Fuel Co.
2700 Loch Raven Rd.
Baltimore, MD 21218
18 Loveton Cir.
Sparks Glencoe, MD 21152
Phone: (410) 261-5350
Web: highs.com
Pres.: John Phelps
Primary Supplier: Liberty
FW Stores: 52
FW Volume: \$101.6 million

Miller Marts

Div. of Global Partners IIc
800 South St., Ste. 500
Waltham, MA 02453
Phone: (781) 894-8800
Web: gotomillers.com
Pres./CEO (Global Partners): Eric Slikfa
Primary Supplier: Davenport
FW Stores: 11
FW Volume: \$26.4 million

Royal Farms

3611 Roland Ave.
Baltimore, MD 21211
Phone: (410) 889-0200
Web: royalfarms.com
Pres./CEO: John Kemp
CFO: Joshua Wolfe
CPO: Brian Roche
Primary Supplier: Cooper Booth
FW Stores: 271
FW Volume: \$916.8 million

Rutter's

Div. of CHR Corp.
2100 North George St.
York, PA 17404
Phone: (717) 848-9827
Web: rutters.com
Pres.: Scott Hartman
Pres.-Real Estate: Chris Hartman
VP-Operations: Jere Matthews
VP-Marketing: Robert Perkins
Primary Supplier: Core-Mark
FW Stores: 73
FW Volume: \$184.3 million

Sheetz, Inc.

5700 Sixth Ave.
Altoona, PA 16602
Phone: (800) 487-5444
Web: sheetz.com
Exec. Vice Chmn.: Joe Sheetz
CEO/Pres.: Travis Sheetz
Chief Innovation Officer: Mary Beth Green
Primary Supplier: Direct
FW Stores: 167
FW Volume: \$728.6 million

Turkey Hill Minit Markets

Div. of EG Group
165 Flanders Rd.
Westborough, MA 01581
Phone: (800) 225-9702
Web: turkeyhillcstores.com
Group CEO/Pres.: Russell Colaco
CFO: Mark Segal
Chief Legal Officer: Erik Chalut
Primary Supplier: Core-Mark
FW Stores: 112
FW Volume: \$193.6 million

Wawa, Inc.

Red Roof, 260 W. Baltimore Pike
Wawa, PA 19063
Phone: (610) 358-8000
Web: wawa.com
CEO/Chmn.: Chris Gheysens
Pres.: Brian Shaller
COO: Justin Tichy
CFO: David Hammer
CPO: Maria Kalogredis
Primary Supplier: McLane/Direct
FW Stores: 216
FW Volume: \$1.66 billion

WHOLESALE CLUBS

BJ's Wholesale Club

350 Campus Dr.
Westborough, MA 01752
Phone: (774) 512-7400
Web: bjs.com
CEO/Chmn.: Robert W. Eddy
EVP/CFO: Laura Felice
EVP/Chief Commercial Officer: Paul Cichocki
EVP/Chief Merch. Officer: Stephanie Reibling
EVP/Chief Information. Digital Officer: Monica Schwartz
FW Stores: 30
FW Volume: \$1.26 billion

Costco

Northeast Div.
45940 Horseshoe Dr., Ste. 150
Sterling, VA 20166
Phone: (703) 406-6800
Pres./CEO: Ron Vachris
EVP/CFO: Gary Millerchip
Northeast Div. SVP/GM: Adam Self
COO/EVP-Eastern Div.: Yoram Rubanenko
FW Stores: 31
Annual Wholesale Vol: \$2.31 billion

Sam's Club

2010 SE Simple Savings Dr.
Bentonville, AR 72712
Phone: (479) 273-2841
Web: samsclub.com
CEO/Pres.: Latriece Watkins
SVP/CFO: Rhianon DeLeeuw
EVP/CMO: Myron Frazier
COO: Steve Shrobligen
SVP/Chief People Officer: Claire MacIntyre
FW Stores: 26
Regional Vol: \$1.19 billion

MASS MERCHANDISERS

Target

1000 Nicollet Mall
Minneapolis, MN 55402
Phone: (612) 304-6073
Web: target.com
CEO: Michael Fiddelke
EVP/COO: Lisa Roath
EVP/Chief Merch. Officer: Cara Sylvester
EVP/CFO: Jim Lee
FW Stores: 113 (Includes Super Target)
FW Volume: \$2.29 billion (grocery/HBC only)

Walmart

1 Customer Dr.
Bentonville, AR 72716
Phone: (479) 273-4000
Web: walmart.com
CEO: Doug McMillon
Pres./CEO - U.S.: John Furner
EVP/CFO: John Rainey
EVP/CTO/CDO: Suresh Kumar
EVP/CPO: Donna Morris
FW Stores: 157 (includes SuperCenter/Neighborhood Mkt.)
FW Volume: \$6.77 billion (grocery/HBC only)

TAKING STOCK

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smaller because costs are higher and consumers are typically more demanding, which begs the question, what are the points of difference that The Fresh Market offers shoppers? As one of my industry buddies noted: nothing makes for a future Trader Joe's than a closed Fresh Market...David Haaf has been named VP-fresh foods for FMI, replacing the talented Rick Stein (ex-Safeway) who retired in April after 87, er, 54 years in the grocery biz, the last 11 with the industry's pre-eminent retail food trade association which is based in Arlington, VA. Haaf, who spent most of his career at Food City (K-VA-T), the successful family-owned regional chain based in Abingdon, VA (about as far away from Arlington as you can get and still be in the Old Dominion), is joining FMI after a three-year stint as president and CEO of Madison, WI-based International Dairy Deli Bakery Association (IDDBA) which completed its huge national show in Orlando, FL earlier this month...from the obit desk comes news of the death of Sonny Rollins, 95, one of the greatest saxophone players in music history and an iconic figure in the jazz world for 70 years. Over the course of his long career, which began commercially in 1949, Rollins' ability to improvise helped him reinvent himself several times. He was a be-bopper, an avant-garde player and a jazz-fusion artist. He played with Miles Davis, John Coltrane, Thelonius Monk and even the Rolling Stones (three tracks from the 1981 album "Tattoo You"). I'm certainly no jazz aficionado, but when Sonny Rollins played the sax, the sound and vibe were clearly different. If you've never listened to Rollins, one album that I'd recommend is "Saxophone Colossus" (1956). The first track, "St. Thomas," is simply great...and in my continuing quest to highlight other musicians who recently passed away and were great at their craft but sadly were underrated or unsung during their careers, I note the death of the great R&B singer Clarence Carter, who left us last month at the age of 90. Carter, who was the son of sharecroppers and was born blind in Montgomery, AL, learned how play guitar as a child and later attended the Alabama School for the Blind in Talladega, where he learned to transcribe musical arrangements in Braille. Carter's deep baritone voice and soulful delivery made you take notice of his talent and with hits like "Slip Away" (1968) and "Patches" (1970), he became a star. And then there was his ribald side, penning such underground hits as "Back Door Santa" (1968) and "Strokin'" (1986). A truly gifted musician, Clarence Carter's raw talent made you pay attention to his voice and lyrics...also passing away last month was one of the greatest wide receivers in the history of the NFL, Raymond Berry. At 6' 2" and 185 pounds with below average speed, Berry likely wouldn't even be considered as an NFL player today. But with tremendous hands and great footwork, Berry was the best route runner in his day and partnered with the greatest quarterback of his era, Johnny Unitas (imagine if Johnny U played today with rules now heavily favoring offenses). In his 13-year career, all with the Baltimore Colts, Berry led the NFL in receptions and receiving yards three times and twice led the league in receiving touchdowns and receiving yards per game. He played in six Pro Bowls and, when he retired in 1967, he held the all-time record for passes caught (631) and receiving yards gained (9,275). Both of those marks have long been surpassed. After he packed up his shoulder pads, Berry served as an assistant coach for five NFL teams including the Patriots where he was also head coach for nearly six years (he led the Patriots to a Super Bowl in his first year, 1986, where they were trounced by a great Chicago Bears team, 40-16). Raymond Berry was elected into the NFL Hall of Fame in 1973.

IN REVIEW: TARGET

State	County	2026 Stores	2026 Sales (in millions)	2026 County Food Sales	% of 2026 County Market	2025 Stores	2025 Sales (in millions)	% of 2025 County Market
DC	Washington	5	\$108.50	\$2,804.20	3.87%	5	\$106.30	3.90%
DC Recap: 5 stores with sales of \$108.5 million. Total retail food sales for DC in the study: \$2.8 billion. Target share of DC is 3.87%.								
DE	Kent	1	\$19.70	\$585.40	3.37%	1	\$19.30	3.36%
DE Recap: 1 store with sales of \$19.7 million. Total retail food sales for DE in the study: \$1.71 billion. Target share of DE is 1.15%.								
MD	Anne Arundel	5	\$113.80	\$2,635.90	4.32%	5	\$110.50	4.35%
MD	Baltimore City	1	\$23.20	\$1,450.60	1.60%	1	\$22.90	1.51%
MD	Baltimore County	6	\$116.10	\$3,814.40	3.04%	6	\$113.20	3.00%
MD	Carroll	1	\$15.90	\$755.90	2.10%	1	\$15.40	2.03%
MD	Charles	2	\$30.90	\$669.20	4.62%	2	\$31.20	4.87%
MD	Frederick	1	\$17.80	\$1,120.20	1.59%	1	\$17.40	1.62%
MD	Harford	3	\$56.20	\$1,222.50	4.60%	3	\$54.90	4.76%
MD	Howard	2	\$46.70	\$1,353.20	3.45%	2	\$45.50	3.40%
MD	Montgomery	6	\$140.40	\$4,304.80	3.26%	6	\$135.60	3.24%
MD	Prince George's	8	\$229.60	\$3,719.30	6.17%	8	\$221.20	6.03%
MD	Queen Anne's	1	\$21.00	\$169.20	12.41%	1	\$20.50	12.25%
MD	St. Mary's	1	\$16.30	\$410.10	3.97%	1	\$16.70	4.17%
MD	Talbot	1	\$19.50	\$237.30	8.22%	1	\$18.90	7.99%
MD	Washington	1	\$15.90	\$634.60	2.51%	1	\$15.40	2.53%
MD	Wicomico	1	\$16.70	\$325.90	5.12%	1	\$15.90	4.85%
MD Recap: 40 stores with sales of 880.0 million. Total retail food sales for MD in the study: \$24.54 billion. Target share of MD is 3.96%.								
PA	Cumberland	2	\$34.80	\$1,300.10	2.68%	2	\$37.50	2.91%
PA	Dauphin	2	\$31.50	\$1,118.70	2.82%	2	\$31.40	2.77%
PA	Franklin	1	\$18.90	\$546.80	3.46%	1	\$18.40	3.43%
PA	Lancaster	3	\$65.10	\$1,883.20	3.46%	3	\$63.00	3.41%
PA	Lebanon	1	\$20.10	\$489.20	4.11%	1	\$19.70	4.15%
PA	York	3	\$64.70	\$1,826.80	3.54%	3	\$63.10	3.54%
PA Recap: 12 stores with sales of \$235.1 million. Total retail food sales for PA in the study: \$7.52 billion. Target share of PA is 3.13%.								
VA	Albemarle	1	\$16.90	\$755.10	2.24%	1	\$16.40	2.20%
VA	Arlington	3	\$64.10	\$1,004.20	6.38%	3	\$62.80	6.06%
VA	Chesapeake City	3	\$33.80	\$1,003.20	3.37%	3	\$33.10	3.32%
VA	Chesterfield	5	\$71.70	\$1,814.30	3.95%	5	\$70.80	4.02%
VA	Culpeper	1	\$16.60	\$197.40	8.41%	1	\$16.10	8.34%
VA	Fairfax	10	\$264.20	\$6,579.20	4.02%	10	\$253.10	3.98%
VA	Frederick	2	\$30.30	\$583.90	5.19%	2	\$29.40	5.23%
VA	Hampton/Newport News	2	\$30.40	\$1,337.30	2.27%	2	\$29.60	2.22%
VA	Hanover	1	\$18.50	\$559.70	3.31%	1	\$18.30	3.36%
VA	Henrico	6	\$113.70	\$2,149.30	5.29%	6	\$109.20	5.19%
VA	James City	2	\$28.10	\$443.80	6.33%	2	\$27.30	6.22%
VA	Loudoun	4	\$90.30	\$1,802.60	5.01%	3	\$65.20	3.72%
VA	Norfolk City	1	\$15.50	\$899.50	1.72%	1	\$15.20	1.73%
VA	Orange	1	\$17.10	\$155.80	10.98%	1	\$16.80	10.92%
VA	Prince William (Super Target)	4	\$68.20	\$2,278.50	2.99%	4	\$66.90	3.01%
VA	Spotsylvania	2	\$36.90	\$900.30	4.10%	2	\$35.90	4.08%
VA	Stafford	2	\$39.90	\$509.70	7.83%	2	\$38.60	7.89%
VA	Virginia Beach	4	\$67.20	\$1,976.80	3.40%	4	\$65.90	3.51%
VA	Warren	1	\$18.90	\$185.20	10.21%	1	\$18.20	10.27%
VA Recap: 55 stores with sales of \$1.04 billion. Total retail food sales for VA in the study: \$29.09 billion. Target share of VA is 3.79%.								

Mid-Atlantic Recap: 113 stores with sales of \$2.86 billion annually. Mid-Atlantic retail food sales total: \$64.4 billion.

Target Per Store Average: \$20.22 million

Source: Food World, June 2026



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From the freshest perishables to grocery must-haves, Bozzuto's provides independent retailers across the Northeast and Mid-Atlantic with the goods to be their very best. And we can also assist with finding new store locations, space management programs and store remodels. You can have it all, in just one call!

For more information, contact Steve Capanna at 203-250-5378.



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