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15 Lidl Leadership Team Attends Columbia, MD Grand Opening



96 Wegmans Opens Fourth North Carolina Location In Wake Forest

Food World

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Vol. 77 No. 6

MARKET STUDY ISSUE

June 2021

TAKING STOCK

by Jeff Metzger



Many Retailers Poised To Maintain Momentum Even As Sales Wane

I'll bet if I'd polled 50 retailers a year ago when the huge sales spikes created by pandemic-related fears had already abated a bit, almost all would have said that comp store revenue would decline to significant negative levels when looking 12 months forward.

However, that clearly hasn't been the case with almost all merchants. Certainly, comp store sales have continued to decrease each month since the panic-buying/hoarding peak of March and April 2020, but retailers in the supermarket, mass and club channels have all continued to post same store sales gains for the first five months of this year that were better than 2019 levels (the last year of normalcy).

A clearer view will become more visible over the next six months when
See **TAKING STOCK** on page 8

Giant Food, Walmart, CVS, Food Lion Pace Merchants In \$54.9B Market

Pandemic Mayhem: Retailers Post Record Sales In Challenging Times

A record year for sales in food retailing was sadly overshadowed by the global COVID-19 pandemic which to date has infected 33.5 million Americans resulting in nearly 600,000 deaths.

And while many thought that retail food sales would revert back to 2019 levels by this time, that hasn't happened yet as many retailers have protected themselves from significant sales reductions by making their stores safer and more efficient to shop. They've also ramped up and refined their online platforms, where e-commerce sales typically doubled

during the past 12 months.

During our market study measuring period which ran from April 1, 2020 through March 31, 2021 retailers generally experienced sales gains in the 12-14 percent range. And while this market study doesn't focus on earnings, virtually all retailers - particularly supermarkets, club stores and mass merchandisers - earned record level profits despite significantly higher expenses related to adding safety protections and protocols at their stores and rewarding their clerks and meat-cutters with bonus pay.

What you'll see as you read the data in our annual market study is that retail food sales increased significantly. However, there was little share of market change in our key market-by-market analysis because most retailers were

focused on keeping their in-stock conditions tolerable (during the first three months of the pandemic) and ensuring that the safety of their customers and associates was prioritized. Additionally, more than any other year since we began publishing our market study in 1979, the amount of new store openings (which would affect market share change) was at an all-time low.

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

The perennial market leader, Giant Food, once again performed well during challenging times. Sales surpassed the \$6 billion mark (\$6.10 billion) for the first time in its 85-year history. The Landover, MD-based Ahold

See **MARKET STUDY** on page 101



THE FIRST AMAZON FRESH GROCERY STORE IN THE GREATER Washington, DC area opened May 27 Franconia, VA. At the Franconia grand opening were (l-r) store manager Amy Donner, zone lead for associate experience Heba Zalzala and front end zone manager Christopher Allison. Next up in the region for Amazon Fresh will be a new store in Chevy Chase, MD which is currently hiring store associates.

Ex-Pepsi Exec To Fill Role Of Geoff White, Who Is On Leave

Albertsons Names Jennifer Saenz EVP-Chief Merchandising Officer

Albertsons Companies has announced that Jennifer Saenz will join the company as EVP and chief merchandising officer effective July 12, 2021. In this position, she will be responsible for all areas of merchandising within the company, including own brands.

Saenz will also be responsible for further strengthening the company's relationships with its brand partners. She will join Albertsons senior leadership team and report to Vivek Sankaran, president and

See **ALBERTSONS** on page 85

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OBITUARY



Benjamin (Ben) Louis Sigman of Baltimore passed away earlier this month at the age of 76.

Sigman was a co-owner B. Green & Co., which began as a wholesale grocer in Baltimore in 1915. The company sold its traditional distribution business to Richfood in 1994, which later became Supervalu, now UNFi. The family-owned company also

sold its military business to Nash Finch (now SpartanNash). After selling the wholesale business, B. Green became an independent retailer that currently operates two Food Depots, two cash & carries and also maintains a re-distribution business.

Sigman joined B. Green in the mid-1960s, directly after graduating from the University of Baltimore. He was a candy buyer

for many years and later pivoted towards an HR role, which best matched his passion, skills and personality.

He was VP of administration for most of the last years of big B. Green. He continued his role as VP of HR until he passed away. He was viewed by the trade as a true gentleman of the business.

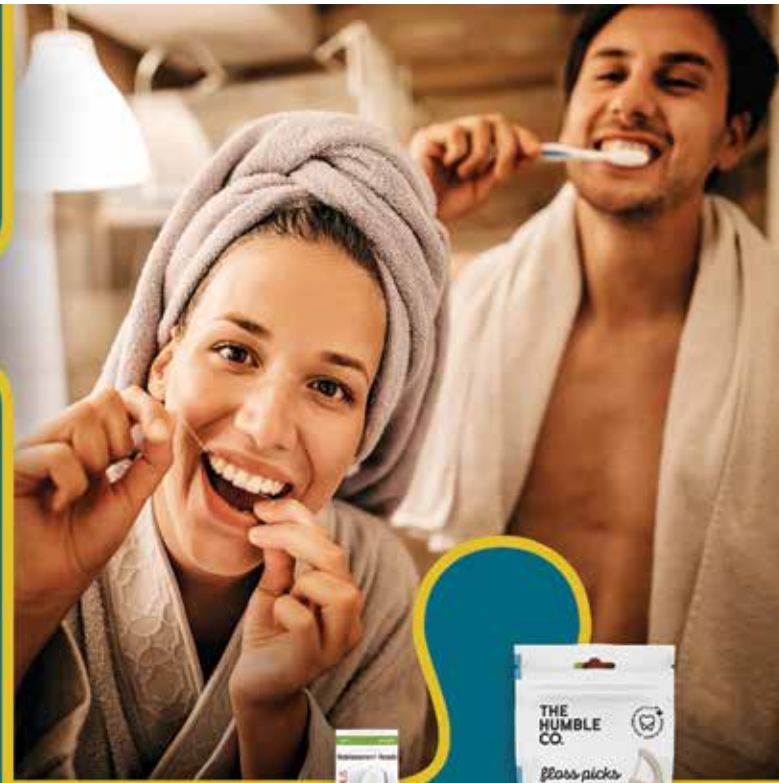
Sigman is survived by his wife Lois (nee Wolff); his children

David (Christine) Sigman and Stacy (Andrew) Bergman; his sister Bernice (Ann Clevinger) Sigman; grandchildren Jessica (Eric) Header, Ethan Sigman, Halle Sigman, Hannah Bergman, Jonah Bergman and Nathaniel Bergman; and great-grandchildren Audrey Header and Madison Header. He was predeceased by his parents Isaac Michael and Anna Sigman.

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¹IRI TOTAL US MULO+C L52WK 3/21/21. ²Consumer Sensory Research, January 2021.



AISLE chatter

By Karen Fernandez

According to a recent economic impact study conducted by John Dunham & Associates for the National Grocers Association (NGA), independent community grocers play a pivotal role in the nation's economy. According to the report, "Grocers Impact America," independent community grocers are responsible for more than 1.1 million jobs (up from 944,200 in the previous study) with earning wages approaching \$39 billion. They also represent 1.2 percent of the 2020 U.S. gross domestic product of \$20.93 trillion, with a total output exceeding \$255 billion. Wholesalers serving independent grocers provide more than 44,000 jobs that earn wages of nearly \$3.3 billion. Additionally, the independent grocery industry is directly or indirectly responsible for nearly 860,000 jobs across other industries including agriculture, manufacturing and transportation. They also generate federal, state and

local tax revenues surpassing \$36 billion and their grocery sales account for 33 percent of total grocery sales, up from 25 percent a decade ago.

"Not only are independent community grocers at the heart of the community, they are also at the heart of the U.S. economy, responsible for more than 1.1 American million jobs across thousands of communities," said NGA president and CEO **Greg Ferrara**. "The continued strength and growth of the independent supermarket industry shows consumers are supporting local, community grocers who continue to innovate and bring value to the communities they serve." Ferrara continued, "Through strategic investment and planning, independent community grocers found themselves well positioned to meet the intense demand placed on them by consumers during the pandemic, and have proved themselves to be indispensable partners in their communities and local economies," Ferrara said. "Despite this growth over the past decade, independents appear to be losing a foothold in rural and inner-city low-income areas. NGA is working to reverse this trend through a comprehensive antitrust advocacy approach that would rein in growing power-buyer influence and encourage grocery investment in disadvantaged communities."

For more information on the data collected in this study or to see its methodology, visit www.grocersimpactamerica.com.

It's officially summer and

with school dismissed until fall, many families like to take vacation time over the course of the summer months. For some, what better way to spend some extended time off than to take a cross-country tour of the United States? While not everyone has the luxury of being able to take the full amount of days off necessary to do so and with COVID still making some hesitant to travel, The Giant Company (TGC) has a fun at-home alternative to this idea. The Carlisle, PA-based division of Ahold Delhaize USA has created a fun and engaging virtual foodie U.S. road trip to last all summer long with online classes highlighting food favorites and foods inspired by spots from across the nation. The live Zoom classes, which were put together by TGC's nutritionists, are open to chefs of all ages throughout June, July, and August and will feature a different state for inspiration during each class. For mini chefs ages 6 and under, every Friday morning at 10:30 a.m. will consist of snack crafting. For the junior chefs ages 7 to 18, every Wednesday at 4pm will be an afternoon of quick cooking. For the more advanced home chefs, Tuesday nights at 5:00. will be a dinner cooking lesson. And on select Saturdays at 10:00 a.m., the classes will be a morning of creating and baking.

"Gather around the table and join us on our culinary adventure this summer as we explore regions across the country through our mini chef, junior chef, family meals and Saturday baking classes," said **Shan-**

na Shultz, RD, LDN, regional nutritionist at TGC. "These fun meal and snack ideas, for both kids and adults, will inspire your family to not only try some new foods, but to also spend more time cooking together in the kitchen."

All classes are free to attend, but advanced registration is required for each class at the-giantcompanynutritionists.eventbrite.com. A complete listing of ingredients needed for each virtual class is also available on the event page. Additionally, customers can earn 50 CHOICE Rewards points for each class they attend when they provide their card number upon registration and attend the entire class. I think this program is a wonderful idea that will not only encourage more at home cooking but it's also a very creative way to engage the current and future generation of shoppers. I look forward to checking out some of the classes myself!

TGC also announced this month that it will be rolling out the food waste reduction app, Flashfood, to all of its Giant and Martin's stores this fall. This move follows a successful pilot that the retailer implemented in May 2020 at four Giant stores in Lancaster, PA., The app is now currently available at 30 of its stores and the chainwide rollout will begin with stores in Bucks, Chester, Delaware, Montgomery, and Philadelphia, PA counties, with additional stores joining each month. The way the app works is Flashfood partners with grocery stores to help reduce food waste while at the same time offering consum-

ers savings. Perishable food items that might otherwise go to waste are listed on the app for significant discounts and shoppers can click on them and then pick them up at participating stores, with the list of discounted items changing every day. It allows consumers to purchase fresh food, including produce, meat, deli, and bakery products, nearing its best before date at significantly reduced prices.

"Our ongoing partnership with Flashfood is two-fold, providing our customers with access to fresh foods, while also helping to divert more than 250,000 pounds of additional food waste away from landfills," said **Glenn Harris**, SVP of customer experience for TGC. "We've received great feedback over the past year from our customers, many of whom have told us they can eat more fresh food because of the program. We can't wait to offer this program at all of our stores and to all of our customers this summer."

The move is just another step in the grocery chain's proactive sustainability efforts, which also include its EPA-recognized food rescue program, Meat the Needs, plastic bag recycling and plastic reduction, a solar field and bee pollinator habitat at its Carlisle corporate headquarters, reducing emissions through tree-planting with GreenPrint, installing energy-efficient fixtures and reducing refrigerant emissions in all stores, and sustainable product offerings such

See **AISLE CHATTER**
on page 126



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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 essentially 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.

Because of unprecedented sales gains made by most retailers in this study, we saw an increase in the numbers of counties/cities where the collective volumes of the retailers operating stores in those locales exceeded the overall per capita retail food sales for those counties or cities.

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.

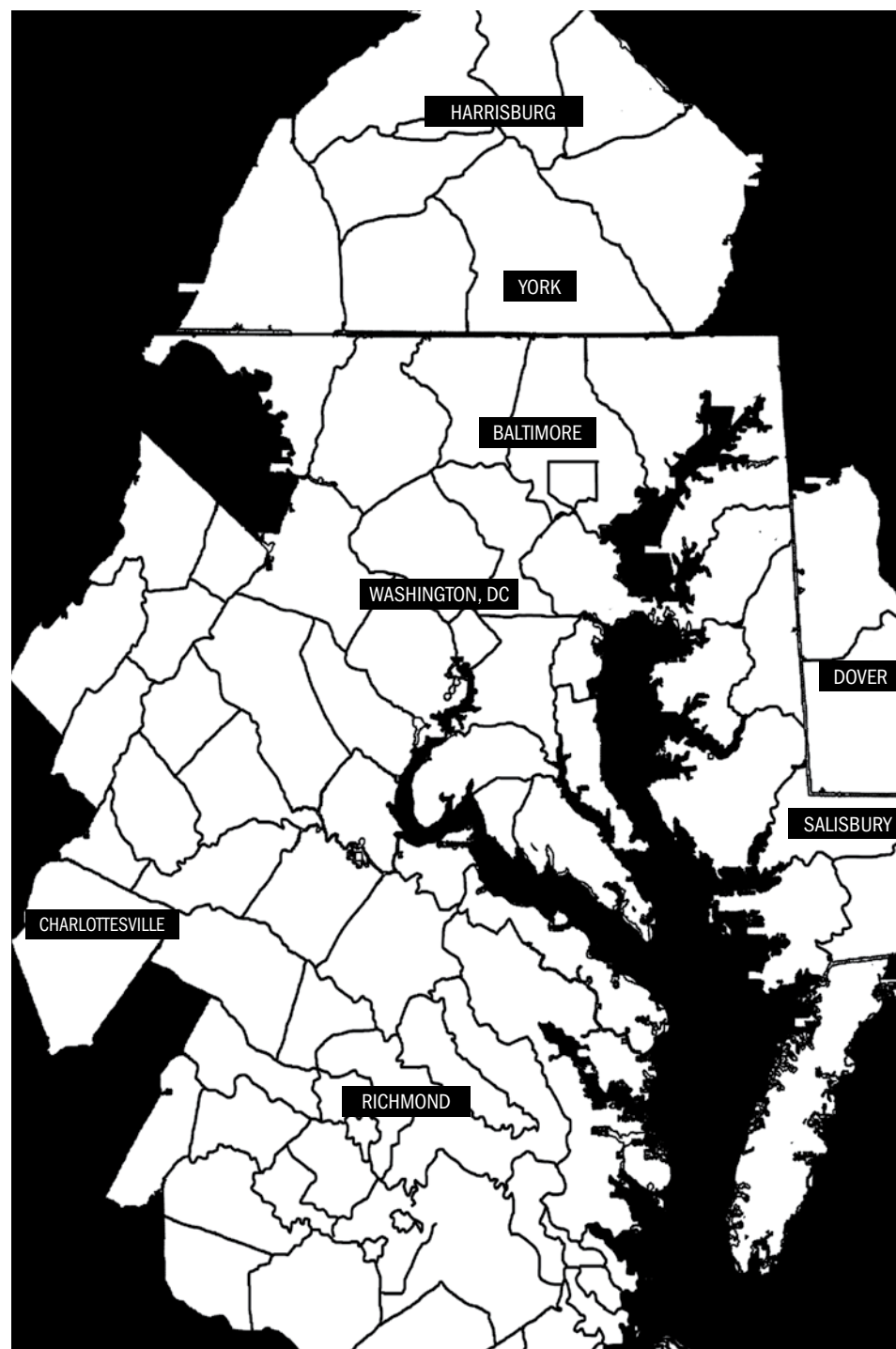
Leakage, or “county-hopping,” can result from a sparsity of stores in one county causing consumers to shop in a bordering county where food retailing opportunities are more available, creating a build-up of food sales in those areas. High volume retailers such as Walmart, Costco and Wegmans, which operate stores in the 120,000-214,000 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 contributes to “leakage” in certain counties.

While sales from stores located in resort areas 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 beach havens still exceeded 100 percent of per capita food sales in those counties, the amount of spill-in business done in those counties in 2020 was significantly less than in previous years due to COVID-19 related lockdowns and restrictions.

Other than Sussex County, Worcester County, Accomack County and Virginia Beach, counties which also surpassed 100 percent of their county per capita sales projections included Montgomery, MD; Cumberland, PA; Lancaster, PA; Chesterfield, VA; Orange, VA; Prince William, VA and Stafford, VA.

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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TAKING STOCK

From page 1

children return to actual classrooms and restaurants continue to build on recent sales and traffic momentum. Those two factors will surely create a dip in retail food revenue both with in-store visits and online ordering from the levels we've seen over the past year.

What's becoming more ambiguous, however, is how much the labor shortage will continue to impact the grocery business as well as the restaurant business. Simply stated, the labor pool is the worst it's been in three decades and even if retailers can find available people to hire, many of them aren't particularly good or loyal, which could lead to significant turnover. Several merchants told me they hope that once the federal unemployment insurance subsidy (American Rescue Plan) expires on September 30, more potential job seekers will re-enter the labor pool. However, what that percentage may be is anybody's guess at this point. Another factor, and one that is more predictable, is the number of people who have permanently left jobs such as store clerk or waitress during the pandemic in order to seek careers that are more stable and lucrative.

And then there's inflation, which is rising monthly to near record levels. One retailer told me that he considered putting no meat items (except hot dogs) in his company's July 4 ad, due to skyrocketing wholesale costs. "Should I feature sirloin steaks at \$8.99 a pound just to lose a little money or will that 'feature' price alone insult our customers?" He ultimately decided to include the steaks in his company's ad.

It's not just meat that's seen soaring prices over the past two months. Commodity costs for corn, wheat and soybeans are also escalating. And its even worse with packaging - corrugated and plastics in particular - and suppliers tell us that by early Q4 consumers will see prices that they haven't experienced before.

One senior VP-sales for a large CPG supplier said, "When all these price increases are woven into the system and ultimately passed along, it's going to have a profound effect on a lot of Americans. You can start at the farm, move to the manufacturing plants and ultimately to the stores' shelves - everything is going to cost more. A lot more. Even basic supply chain issues from finding enough labor to work in plants and warehouses to the shrinking

TAKING STOCK continues on page 16

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FOOD WORLD'S LEADING CHAIN STORES: 2021

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 99. Petroleum sales are not included.

Total sales of retail grocery, drugs, HBC, general merchandise and tobacco products in the Mid-Atlantic area are \$54.89 billion.

Rank	Company	Stores	2021 Sales (in millions)	2021 % of Area Market
1	Giant Food	159	\$6,097.76	11.11%
2	Walmart (SC/Neighborhood Mkt)	161	\$5,430.00	9.89%
3	CVS	646	\$3,564.30	6.49%
4	Food Lion	254	\$3,234.60	5.89%
5	Albertsons (Acme/Balducci's/Safeway)	122	\$3,000.81	5.47%
6	The Giant Company (Martin's)	62	\$2,754.89	5.02%
7	Harris Teeter	78	\$2,361.00	4.30%
8	7-Eleven	1,142	\$2,172.70	3.96%
9	Wegmans	23	\$1,969.80	3.59%
10	International Markets	131	\$1,891.90	3.45%
11	Target (Super Target)	110	\$1,849.10	3.37%
12	Weis Markets	97	\$1,829.06	3.33%
13	Walgreens	327	\$1,769.50	3.22%
14	Costco	30	\$1,739.40	3.17%
15	Kroger (Marketplace)	38	\$1,283.70	2.34%
16	Whole Foods	32	\$1,242.90	2.26%
17	Wawa	169	\$1,149.89	2.09%
18	BJ's Wholesale Club	29	\$1,045.70	1.90%
19	Aldi	128	\$1,033.30	1.88%
20	Sam's Club	26	\$1,020.10	1.86%
21	Trader Joe's	28	\$687.30	1.25%
22	Shoppers	23	\$653.40	1.19%
23	Rite Aid	186	\$640.70	1.17%
24	Military Commissaries	20	\$582.91	1.06%
25	Sheetz	145	\$557.80	1.02%
26	Royal Farm Stores	212	\$513.90	0.94%
27	ShopRite (Price Rite)	16	\$443.10	0.81%
28	C&S Independents	101	\$400.26	0.73%
29	Lidl	46	\$360.30	0.66%
30	Publix	19	\$286.00	0.52%
31	Redner's Markets	13	\$280.10	0.51%
32	MOM's Organic Market	16	\$230.90	0.42%
33	Save-A-Lot	36	\$224.80	0.41%
34	The Fresh Market	16	\$192.20	0.35%
35	Fas-Marts	100	\$168.20	0.31%
36	Turkey Hill	113	\$163.60	0.30%
37	Rutter's Farm Stores	68	\$129.80	0.24%
38	Great Valu	13	\$115.10	0.21%
39	Sprouts	6	\$110.10	0.20%
40	High's/Baltimore	54	\$95.10	0.17%
41	Dash-In	44	\$87.00	0.16%
42	Circle K	34	\$69.50	0.13%
43	Grocery Outlet	10	\$64.10	0.12%
44	IGA	7	\$61.52	0.11%
45	Giant Eagle	4	\$39.50	0.07%
46	Miller Marts	15	\$28.60	0.05%
47	Kmart	3	\$17.30	0.03%
48	America's Food Basket (Ideal)	1	\$7.59	0.01%
48	ASG	1	\$4.99	0.01%
GRAND TOTAL		5,114	\$53,656.08	97.72%

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

Source: *Food World*, June 2021

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DIRECTORY OF RETAILERS

This directory includes retailers that operate stores in the Food World market, which essentially 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. Annual sales and store counts included are only for this 89-county geographic area.

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VP-HR: Monique Lanoux
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DM-Kings: Emilio Romeo
DM-Balducci's: Frank Cardosa
DM-Special Projects: Joe Hultz
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Sales Mgr.-Own Brands: Anne Marie Mozzone-Acme/S-way, Mitchell Cohen, Kings/Balducci's
Sales Mgr.-Grocery: Pat Hildebrand-Acme/S-way, Antonio Acosta, Kings/Balducci's
Sales Mgr.-GM/HHB: Kamal Persad-Acme/S-way
Sales Mgr.-Liquor: Tim Ley-Acme/S-way, John Coleman, Kings/Balducci's
Sales Mgr.-Produce: Ricardo Dimarzio-Acme/S-way, Joe Lerario, King/Balducci's
Sales Mgr.-Meat: Mike Salisbury, Acme/S-way
Sales Mgr.-Seafood: Charlie Bell, Acme/S-way, Richard Michener, Kings/Balducci's
Sales Mgr.-Bakery: Christine Hixon, Acme/S-way, Michele Tuscano, Kings/Balducci's
Sales Mgr.-Deli: Angie Marshall, Acme/S-way, Matthew Nangle, Kings/Balducci's
Sales Mgr.-Floral: Katie Vasquez, Acme/S-way, Michelle Edwards, Kings/Balducci's
Sr. Dir.-Catering: Jennifer Fouts-Kings/Balducci's
Dir.-Marketing: Sherry Caldwell
Sr. Dir.-Finance: Randy Weist

Dir.-Loss Prevention: Randy Conway
Dir.-Construction: Shawn Dekker
Dir.-Customer Service: Marianne Nice-Trionfo
Dir.-Pharmacy: Amir Masood-S-way, Janis Levit-Acme
Dir.-HR: Sloan Nichols
Dir.-Labor Rel.: Joan Williams
Dir.-Food Safety: James Walden
Dir.-E-Commerce: Alicia Bell-Acme, Betsy Gavigan-S-way
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250 Parkcenter Blvd.
Boise, ID 83706
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Pres./CEO: Vivek Sankaran
Web: Albertsons.com
Primary Supplier: Direct
Food World Stores: 122 (Includes Acme, Balducci's, Safeway)
Food World Vol.: \$3.0 billion

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Phone: (800) 767-7772
Web: aholddelhaize.com
Ahold Delhaize CEO: Frans Muller
Ahold Delhaize USA CEO: Kevin Holt
Pres.-RFBS: Roger Wheeler
Pres.-Peapod Digital Labs: JJ Fleeman

Aldi, Inc.

1200 N. Kirk Rd.
Batavia, IL 60510
Phone: (630) 879-8100
Web: aldi.com
CEO: Jason Hart
Co-Pres.: Charles Youngstrom, David Behm, Brent Laubaugh
Primary Supplier: Direct
Food World Stores: 128
Food World Vol.: \$1.03 billion

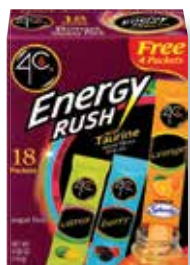
America's Food Basket

1979 Marcus Ave., Ste. 216
New Hyde Park, NY 11042
Phone: (516) 502-2509
Web: afbasket.com
CEO: David Siegel
COO: Daniel Suriel
Primary Supplier: UNFI
Food World Stores: 1
Food World Vol.: \$7.59 million

Associated Stores Group

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

See **DIRECTORY** on page 14





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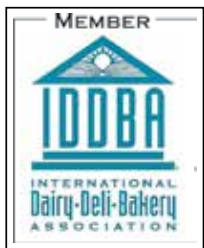


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michaelh@HughesSales.com • www.HughesSales.com**



DIRECTORY OF RETAILERS

From page 12

Primary Supplier: C&S Wholesale Grocers
Food World Stores: 1
Food World Vol.: \$4.99 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
Food World Stores: 11 (Includes Food Depot/Green Valley Market/Shoppers Value)
Food World Vol.: \$217.7 million

Boyer's Markets

301 S. Warren St.
Orwigsburg, PA 17961
Phone: (570) 366-1477
Web: boyersfood.com
Pres.: Dean Walker
CFO: Matthew Kase
EEVP-Sales/Mktg.: Anthony Gigliotti

VP-Ops: Mike Zmitrovich
Dir.-HR: Ann Marie Blashock
Meat/Seafood Merch.: Joseph Cutrona
Produce Merch.: Michael Bush
Deli/Bakery Merch.: Mellisa Erickson
Non-Perishable Merch.: Jeff O'Neill
Primary Supplier: UNFI
Food World Stores: 1
Food World Vol.: \$10.66 million

C&S Independents

336 East Penn Ave.
Robesonia, PA 19551
Phone: (610) 693-3161
Web: cswg.com
Primary Supplier: C&S Wholesale Grocers
Food World Stores: 101
Food World Vol.: \$400.26 million
**C&S Independents are comprised of the independent supermarkets serviced by C&S Wholesale Grocers and supplied from its Robesonia, PA Food World headquarters.*

Compare Foods

Web: comparesupermarkets.com
Food World Stores: 5
Food World Volume: \$20.6 million
**Part of the Compare Foods network that has stores in the Metro New York and North Carolina markets, and as of last*

year, operates five stores in Maryland. Eligio Pena, the founder of Compare Foods, is based in Raleigh, NC. UNFI supplies the Maryland stores.

Eddie's of Roland Park

5125 Roland Ave.
Baltimore, MD 21210
Phone: (410) 323-3656
Web: eddiesofarolandpark.com
CEO/Pres.: Nancy Cohen
VP: Michael Schaeffer
Primary Supplier: Bozzuto's
Food World Stores: 2
Food World Vol.: \$39.3 million

Family Owned Markets

76 W. Frederick St.
Millersville, PA 17551
Phone: (717) 584-3537
Web: familyownedmarkets.com
Dir.-Marketing: Jim Kidwell
Primary Supplier: MDI
Food World Stores: 9
Food World Vol.: \$159.78 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 and Yoder's Country Market.*

Food Lion

Div. of Ahold Delhaize USA
2110 Executive Dr.
P.O. Box 1330
Salisbury, NC 28145
Phone: (704) 633-8250
Web: foodlion.com
Pres: Meg Ham
Primary Supplier: Direct
Food World Stores: 254
Food World Vol.: \$3.23 billion

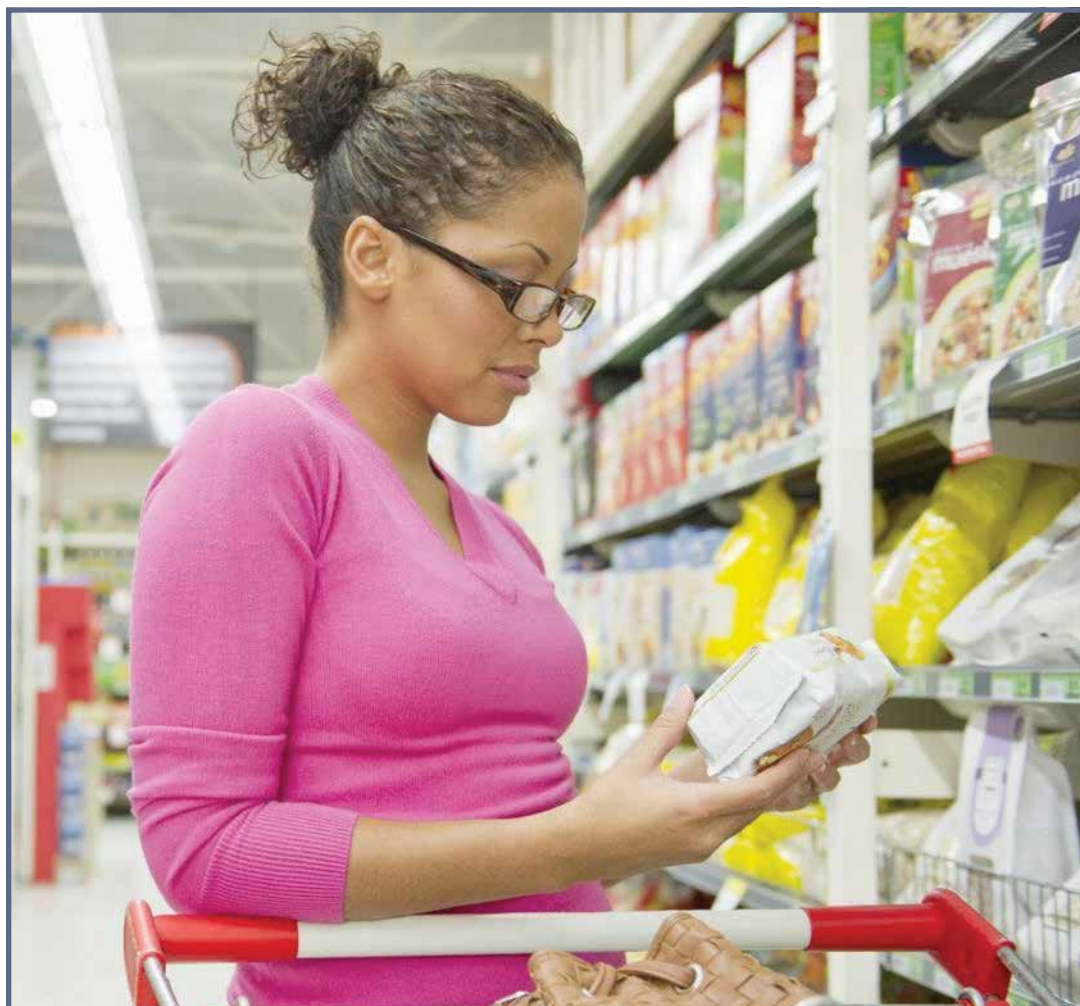
The Fresh Market

300 N. Greene St., Ste. 1100
Greensboro, NC 27401
Phone: (336) 272-1338
Web: thefreshmarket.com
Pres./CEO: Jason Potter
CFO: Oded Shein
Primary Supplier: UNFI
Food World Stores: 16
Food World Vol.: \$192.2 million

Geresbeck's Food Market

2109 Eastern Blvd.
Baltimore, MD 21220
Phone: (410) 686-3487
Web: geresbecks.com
Primary Supplier: C&S

See **DIRECTORY** on page 57



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Lidl Welcomes Customers To Grand Opening Of New Store In Columbia, MD Mall On June 9

Lidl opened its newest area store June 9 at the Mall in Columbia, MD. Welcoming shoppers to the big day from Lidl are director of communications of real estate Andrei Adomnica (l), director of sales operations, U.S., Jean Christophe Chartier, and Lidl U.S. VP Pavel Petkov.



Making sure all runs smoothly on opening day in Columbia are Lidl's Ashley Robinson (l) and Eddy Sweeney.

Barry Tiggemann (l) and Michael Razavian of Lidl are on hand for the big day.



These Lidl folks are (l-r) Jack Linehan, Daniel Goodman and Dustin Schade.



This Lidl trio comprises (l-r) Nicole Patterson, Brooke Freel and John Stuckey.



All smiles for the *Food World* camera are Jason Yang (l) and Edwin Padilla of Lidl.



Steve Harris (r) of Schmidt Baking says hello to Ashley Robinson of Lidl.

No Puppies.

No celebrity gossip. No selfies. No recipes.



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TAKING STOCK

from page 8

number of truck drivers will play a role in driving up prices.”

It's going to be a lot more difficult for companies not to swallow some of these stiff increases than in the past - which means there will be a lot of direct “pass alongs” to the consumer. And coupled with price hikes come product shortages with manufacturers struggling to find raw materials and some items already being placed on allocation.

Still, retailers will adjust as they have in the past. And while there are a lot of unknowns that lie ahead, retailers feel pretty good about their current situation. Business is still good to very good and many have benefited from the lessons of the pandemic and learned to improve their e-commerce games over the past 15 months, making their long-term omnichannel outlook positive.

And while most merchants don't want to dwell in the past, retailers (supplier and wholesalers, too) deserve a huge shout-out for their courageous and selfless efforts during the worst health crisis in a century.

As I've done for the previous 43 years, here's my take on the market leaders in the core Baltimore-Washington market.

Giant Food - A very strong year could have been even stronger if the perennial market leader would have had better in-stock conditions during the early part of the pandemic. Still, Giant has regained its mojo which it lost for 15 years while parent company Ahold (now Ahold Delhaize) ran the regional chain as if it was a subsidiary of Stop & Shop. That changed when Gordon Reid took the helm at Giant. Gordon's now president of Stop & Shop (Giant Food North?) and the big merchant hasn't lost a beat under current leader and veteran Giant executive Ira Kress. Almost every aspect of the Landover, MD-based company has improved, from store operations to merchandising and especially morale. With so much store penetration in the Baltimore and Washington markets, Giant has also done an effective job of acquiring closed chain stores and adding them to their portfolio as net new or replacement units.

Safeway - Not much movement in terms of new store openings (it opened an onsite replacement unit at its Capitol Hill unit), but Safeway remodeled nearly a dozen stores. On a broader scale, the former Eastern division was rolled into the company's Acme unit to become part of the Albertsons Mid-Atlantic division with headquarters shifting from Lanham, MD to Malvern, PA. Also shifting was Safeway's distribution to a more efficient warehouse in Denver, PA. Safeway also performed well during the early stages of the pandemic with much better in-stock conditions than most of its peers. Now that the Eastern division is operating in a unit with great scale, parent firm Albertsons needs to invest some money in the Baltimore-Washington market to more aggressively modernize its stores. The leadership skills are certainly there with president Jim Perkins and SVP Tom Lofland, but Safeway needs to keep pace with its traditional competitors - Giant, Wegmans and Harris Teeter - as well as the growing presence of alternative channel merchants - Walmart, Costco and Target.

Walmart - You'd think a company with the scale and clout of Walmart would have done a better job of avoiding the deep “shelf holes” we witnessed during the first two months of the pandemic, but whether it was a supply chain issue or a labor problem, Walmart clearly missed some opportunities. Overall, it was still a very good year for the Behemoth, especially aided by a ramped-up presence and execution of its digital-driven platform which included curbside pickup and “ship to store.” Last September, the world's biggest retailer added its own order and delivery portal - Walmart+. All told, these huge investments, many made before the pandemic began, have and will continue to pay huge dividends for the company. Once again, for the third consecutive year, the Arkansas merchant did not open a single brick & mortar store, as it continues to spend heavily on e-commerce. Those investments were a game changer over the past 12 months and are designed to put even more distance between Walmart and the remaining retailers in all food channels.

Harris Teeter - A very solid year for the upscale division of Kroger

TAKING STOCK continues on page 43

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FOOD WORLD MARKET STUDY 2021: RULES & ANALYSIS

Unprecedented. That's the only word that comes to mind when describing the last 12 months. Reacting to the worst pandemic in more than a century, food retailers (wholesalers, distributors and manufacturers, too) showed tremendous courage and resilience as they tried to keep their shelves filled and their associates and customers safe.

The expense load to upgrade safety and health protocols was very costly, but the need for chains and independents to act as first responders to provide necessary essentials also paid off in consistent sales increases during our 12-month measuring period that began on April 1, 2020.

In virtually any other scenario, retailers would have been celebrating annual comp store revenue gains of 10-20 percent, but that certainly wasn't the case over the past year. Retail food leaders in all the channels we cover – supermarkets, club stores, mass merchants, drug chains and c-stores – were certainly grateful for the sales lift, but of the more than 40 executives I talked to during the course of the year, none saw the past 15 months as a reason to celebrate. They primarily saw their roles as those of public servants – trying to assure and offer confidence that they were the most important component in providing consumers with their food supply. That trickled down to the millions of store associates who risked their health and welfare by working long hours on the front lines while COVID-19 raged. And also a tip of the hat to the vendors who diligently kept their plants running and, in many cases, shifted their product lines to produce the items that customers most needed and wanted.

This was by far the most difficult market study we've produced since we originated the concept in 1979. The one consistent trend was that on a month-to-month sales comparison for the previous year's 12-month period, sales were up every month except in March 2021. That made data analysis even trickier because there was so much volume during the course of the year, especially in April and May 2020 when retailers were reporting sales jumps

of 60-100 percent (and for most retailers the increases would have been even greater if they could have kept service levels above 85 percent).

The average annual gain for retailers in this survey was in the 12-14 percent range. But even those volume gains oscillated during the year when comparing one retailer against another - even within their own classes of trade.

For example, Wegmans, which had a fine year overall, could have had a better campaign if it were able to keep its multiple service bars, restaurants/taverns and other related prepared food areas open or operating fully. Health concerns certainly forced the uber-chain to opt out, creating lost sales opportunities in some of its most popular and differentiated areas.

Conversely, discount retailer Aldi enjoyed a very strong year capitalizing on strong in-store service levels (helped by operating its own distribution network) and providing the necessary "essentials" that consumers needed. Aldi and other small-box operators also benefited from a short, relatively easy shopping experience which consumers generally desired especially during the early stages of the pandemic.

In terms of which channels made the most sales progress during the past year, mass merchandisers led the pack, followed closely by supermarkets and club stores. Drug chains were noticeably lower (about 5 percent) and convenience stores were a notch lower than that.

As we are exiting the worst health crisis since the "Spanish Flu" Pandemic in 1918-1920, there are permanent emotional impressions that will be branded on us forever. Stores will maintain many of the safety measures that were put in place at the start of COVID-19. Additionally, we've already seen significant merchandising shifts, where retailers (and in many cases, suppliers) will focus on their best-selling products. Not that line extensions and frivolous "new" items won't be offered, they just won't be offered as frequently which is something that should have happened a decade ago when the new product failure

rate was already 90 percent. And from a pure "inside baseball" perspective, the shift in product balance has already begun to impact plan-o-grams and trade funding (the growth of private labels is a factor in this product gerrymandering, too).

Perhaps the biggest change that's now become permanent is the growth of e-commerce. In a bizarre way, retailers who preached their desire to become more omnichannel oriented have seen that flower bloom over the past year.

Almost every retailer in all channels helped grow their overall revenue due to utilization of their e-commerce platforms. Most merchants estimated their digital business doubled during the pandemic with sales still holding steady. Whether you have a deeply developed network like Walmart, Target and (to a lesser degree Kroger and Ahold Delhaize USA) or your e-commerce link is simply ordering from a retailer's website and having Instacart make the last mile home delivery, e-commerce has thrived. And even those retailers that have not built or acquired extensive digital networks have grown their sales by adding a relatively simple bolt-on – curbside pickup.

So, for those of you wondering who is not part of this market study - the biggest non-participant is amazon.com. While we do include sales and store data from Amazon's Whole Foods division and next year, we will include revenue and market share info from Amazon Fresh – which opened its first East Coast store earlier this month (after our measuring period ended) and could have as many as a dozen store open in the next nine months, sales from pure amazon.com grocery - HBC/GM are not included because we don't feel we can get accurate enough data to publish their sales. We have talked to more than a dozen industry experts - syndicators, consultants, retail competitors and even a couple of former amazon.com associates - but getting an accurate handle on how many grocery dollar sales "Godzilla" amassed in Fairfax County, VA is simply not doable at this point, but we'll keep trying. For what it's

worth, many of those industry experts believe that amazon.com now commands approximately a 3 percent market share nationally for grocery and HBC/GM sales.

We have, however, included e-commerce revenue for about 98 percent of the retailers (in all channels) in this edition. That's because virtually all sales are still assembled at the store (or a related fulfillment center connected to the store). Whether it's an Instacart or Shipt delivery or a curbside pickup order, that individual store serves as the "collection" point to pull product and assemble individual orders. The exception would be those fulfillment centers that are not connected to a particular store such as Kroger orders assembled at an Ocado warehouse or Ahold Delhaize USA's Fresh Direct business which it acquired earlier this year (however, The Giant Company's "dark" store in Lancaster, PA is included because customers can pick up their products at the fulfillment center).

We'd like to thank the many retailers who worked with us even more closely this year in attaining precise data – our goal has always been the most accurate sales and market share research available. We owe the retailers a lot.

As we've done since 1979, let's review the key individual markets in our 88-county region and assess and analyze what's occurred over the past year. One last thing to note: while sales have increased significantly over the past year, there hasn't been a paradigm shift in market share. That's partly because the last 12 months have seen the fewest new store openings we've witnessed in our history. And when you add in that for much of the year retailers weren't really playing offense – their priority was "winning" the supply chain battle and protecting their associates and customers – market share gains were minimal.

Baltimore-Washington

Giant Food still holds the dominant position in the \$32 billion marketing area, but more than any other factor that contributed to Giant's small dip in market share was its significant out-of-

stock problem during the first three months of the pandemic. Conversely, number two Safeway (Albertsons), which shifted its distribution from a now closed warehouse in Upper Marlboro, MD to a mechanized depot in Denver, PA (that is shares with sister retailer Acme Markets), performed at a relatively high level when it came to in-store supply conditions. All supermarkets showed modest to significant sales gains during our 12-month measuring period, even Shoppers where parent firm UNFI delayed its pending withdrawal from the B-W market. A few things worth watching include the continued growth of the region's 120 "International Markets" (ethnic supermarkets) and the steady expansion of Aldi's discount stores, now with 74 stores in the B-W area, five more than the prior year. Also, Amazon Fresh opened the first of what appears to be a half-dozen Washington area near-future locations earlier this month. On a broader basis, looking at mass merchandisers, clubs, drug chains and c-stores, number three Walmart, for the third consecutive year, did not open any physical units. However, the "Behemoth" did enhance its presence by bolstering its online business by adding more store-attached fulfillment centers and unveiling its Walmart+ dedicated online delivery service.

Eastern Shore

What impressed me more than any other fact in the 12 counties that comprise the Delmarva Peninsula was Food Lion's ability to "hang with" market leader Walmart. The two merchants couldn't be farther apart in style and market approach. The events of the last 12 months seemed like they would provide momentum for Walmart to expand its market share with its large stores and improved e-commerce offerings - and the Bentonville, AR merchant did indeed enjoy a solid year. However, Food Lion which operates more than two times as many stores as Walmart (33 stores, many in small towns)

See **RULES & ANALYSIS** on page 99

PEOPLE

Advantage Group International recently announced the appointment of Richard Cunningham to the role of managing director, USA. Cunningham joins the global organization, headquartered in Canada, leaders in business-to-business engagement.

Cunningham brings more than 30 years of experience in CPG, having held leadership roles at Coca-Cola, Utz Quality Foods and Wise Foods. Throughout his career, he has been instrumental in revitalizing brands by building relationships and trust with retailers to increase customer retention and brand relevance. Cunningham has spearheaded the development, communication and implementation of effective sales growth strategies and category management for food and beverages to align with retailer goals.

“Richard has a long track record of driving business per-



Richard Cunningham

formance and leading transformational teams because he understands the importance of working collaboratively to build better relationships,” said John McLoughlin, CEO, Advantage Group International. “He will be instrumental in our commitment to strengthen our



Terry Wallace

U.S. business while continuing to engage and deliver unparalleled service to our existing clients.”

Cunningham will be responsible for enacting the vision of establishing the U.S. as a flagship market for Advantage Group, realizing the business’s



Dana Kelly

full potential by generating consequential outcomes for suppliers and retailers. His immediate focus will be leveraging his extensive retail network to drive retailer engagement alongside the existing USA team.

Weis Markets recently an-

nounced the promotion of **Terry Wallace** to VP-supply chain and logistics.

In this position, Wallace oversees all aspects of the company’s supply chain and distribution activities at its 1.3 million-square-foot distribution center in Milton, PA. He reports to Kurt Schertle, chief operating officer.

Prior to his promotion, Wallace was director of procurement. During his 21-year Weis Markets career, he has worked in increasingly senior distribution and procurement positions.

JOH announced that **Dana Kelly** has joined its team as an account executive.

With more than 10 years of experience growing client businesses inside CVS and other top retailers, Kelly has a wealth

See **PEOPLE**
on page 104

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100 Days Update And Moving Forward

Since taking office in January, the Biden-Harris administration has been on a mission to “Build Back Better.” From the American Rescue Plan to the American Jobs Plan and now with the introduction of the American Families Plan last month, action has been taken to rescue and begin to rebuild our economy. Over the last 100 Days, we have seen containment of COVID-19, efforts to curtail hunger and provide better nutrition security, efforts to address climate change, and new initiatives to help struggling farmers and food producers. These efforts, no matter whether one is a Democrat or a Republican, have decreased food insecurity and poverty rates, increased agricultural and export opportunities, and improved critical infrastructure and business investments within the food sector. Now where are we headed?

Moving Forward

The American Rescue Plan is now shifting into higher gear by continuing to help families recover by delivering \$12 billion in nutrition assistance to needy families; providing financial investment across the food supply chain including investments in farming and to producers by putting approximately \$5 billion in assistance to socially disadvantaged producers; and putting nearly \$700 million toward healthcare and housing assistance for rural Americans.

USDA's accomplishments in the first 100 days of the new administration have played a major role in helping to get the economy back on track, reducing hunger, and transforming America's food system with a greater focus on more resilient local and regional food production.

All of this will cost money.... lots of money. The U.S. economy still has a long way to go. Yes, there will be roadblocks as Democrats and Republicans debate how to pay for all these initiatives. But at least the country is moving forward to rebuilding now that the pandemic is just about in our rearview mirror. Following is what the two major departments that oversee the food and farm industry – USDA and FDA – are seeking in the recently

announced President's Fiscal 2022 budget. Specifically, funds requested for the food industry are as follows:

Within the president's \$6 trillion request is a nearly 17 percent increase in discretionary funding for USDA. USDA has requested a total of \$198.1 billion. The budget's impact upon USDA, among other things, will support a stronger nutrition safety net and request \$6.7 billion for the Special Supplemental Nutrition Program for Women, Infants, and Children (WIC) to help vulnerable families.

FDA Budget Needs

Within FDA, the agency's budget for foods and food safety would get almost \$1.2 billion, up from \$1.1 billion in fiscal 2021. Specifically, FDA is requesting, among other critical needs, \$97 million in additional investments to fund core FDA safety programs. This includes food safety investments to support implementation of the New Era of Smarter Food Safety Blueprint that I have written about previously to reduce the number of illnesses attributed to FDA-regulated foods. There is also funding set aside to bolster support programs for maternal and infant health and nutrition.

Well, that is a quick snapshot of the first 100 plus days! Now, let us read about other news from the Hill impacting our food business.

FDA and Delis

The Food and Drug Administration (FDA) has released a new report on a study of foodborne illness risk factors in retail food store deli departments. This study is part of a 10-year initiative that examined when foodborne illness risk factors, such as employees practicing poor personal hygiene, and food safety practices, like improper handwashing, occur. An analysis of the study data showed that deli departments had the best control over ensuring no bare-hand contact with ready-to-eat foods and cooking of raw animal foods to the required temperatures. In contrast, the most common food safety behaviors and practices needing better control included ensuring employees practiced proper handwashing, holding



Barry F. Scher
Policy Solutions LLC

foods requiring refrigeration at the proper temperatures, and cooling foods properly.

Foodborne illness remains a major public health concern in the U.S. causing approximately 48 million illnesses and 3,000 deaths each year and costing roughly \$77.7 billion annually. For more information or to ask questions about the study, contact retailfoodpolicyteam@fdahhs.gov.

Food Help For Seniors

USDA announced last month that the department will increase food assistance for low-income seniors by providing \$37 million in additional support to the Commodity Supplemental Food Program. States will soon receive the additional funds, in addition to up to \$2.6 million in administrative funds from a previous COVID relief bill.

Food aid spending, according to *Politico News*, surpassed \$122 billion in 2020, a 30 percent increase in fiscal year 2020 because of the pandemic, thus setting a record amount.

But wait! Additional help is on the way to help feed Americans. Senator Cory Booker (D- NJ), the new chair of Senate agriculture's nutrition and specialty crops subcommittee, said just last month that he plans to focus on the country's food justice and nutrition problems. He cited worsening rates of obesity, diabetes, and other diet-related diseases in a *Politico* interview. We will be watching for new legislative initiatives to

come from the former Presidential candidate as he also called for a second White House Conference on Food, Nutrition, and Health (the last such conference took place in 1969, under former President Richard Nixon). Booker also wants to create a permanent USDA specialty-crop food box program to help farmers and low-income Americans. You may recall in a prior column when I reported that the Trump administration's Farmers to Families Food Box program was cancelled due to errors and complications. All I can say is let us see how Senator Booker facilitates a proposed new Food Box program. Such a program is a good idea if it is executed properly with no grandstanding.

Beef With Beef

As you should know, the president wants to do more for the environment especially wanting the U.S. farm industry to reach net-zero greenhouse gas emissions before other nations. The problem is that his administration has yet to specifically identify how to cut the flow of methane from livestock and dairy production. Rumors have sprung up already with stories in the media about how the president wants Americans to consume less meat. *Politico* has reported that the meat industry is countering stating that U.S. producers are already ahead of their foreign counterparts when it comes to sustainable farming and ranching, and that more voluntary efforts are needed as opposed to legislative fixes.

One potential benefactor of all this effort to reduce greenhouse gas emissions may be the alternative protein folks who produce plant-based meat! I keep telling you to keep your eye on this plant-based meat ball!

Food Supply Chain

USDA has just closed the official comment period that sought comments on a department-wide effort to improve and reimagine the supply chains for the production, processing and distribution of agricultural commodities and food products. The next step is for USDA to prepare a report and rec-

ommendations for the food industry. Comments received and future actions taken by USDA will help the Department assess the critical factors, risks, and strategies needed to support resilient, diverse, and secure supply chains and ensure U.S. economic prosperity, and nutrition security for all Americans. So, stay tuned for further news and recommendations as the report moves on to the next stage of implementation.

New Food Allergen

Can you name the eight major food allergens? They are peanuts, tree nuts, fish, crustacean shellfish, soy, milk, eggs and wheat. They were officially named major allergens with the passage of the Food Allergen Labeling and Consumer Protection Act in 2004. Well, President Biden has signed into law the Food Allergy Safety, Treatment, Education and Research Act that now designates sesame as the ninth major food allergen. What does this mean for the retail food industry? You have until January 1, 2023, to ensure that food products sold in your stores that sesame are clearly labeled on products sold in your stores.

More Weird Things

Last month I ended my column by citing a report from Wyoming's General Assembly allowing roadkill to be legally used for meat consumption by humans. This month is perhaps even stranger. It appears as if the Customs Border Protection Service (CBPS) at Dulles Airport reported that they found two cow dung cakes in a suitcase left behind after passengers from an Air India flight cleared a CBPS inspection station. The cow dung cakes were later destroyed. Why cow dung? Cow dung is reported to be a vital energy and cooking source in some parts of the world. Yuk!

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

Washington Supermarket Leaders:

Giant Food Continues Washington Leadership Among Supermarkets In \$12.95 Billion Market

- Giant Remains Dominant Chain
- Safeway's Pandemic Effort Strong
- Int'l. Markets Remains Solid Third
- Wegmans Opens In Tysons Corner
- Aldi Continues To Grow Share

Rank	Company	2021 Stores	2021 Sales (in millions)	% of 2021 Market	2020 Stores	2020 Sales (in millions)	% of 2020 Market
1	Giant Food	113	\$4,143.33	32.00%	112	\$3,902.72	33.38%
2	Albertsons (Balducci's/Safeway)	86	\$2,048.93	15.82%	82	\$1,703.90	14.58%
3	International Markets	101	\$1,517.80	11.72%	101	\$1,402.30	12.00%
4	Harris Teeter	43	\$1,427.60	11.02%	44	\$1,278.30	10.93%
5	Wegmans	12	\$1,134.90	8.76%	11	\$978.10	8.37%
6	Whole Foods	22	\$902.60	6.97%	21	\$798.50	6.83%
7	Trader Joe's	18	\$489.60	3.78%	18	\$433.20	3.71%
8	Food Lion	32	\$424.30	3.28%	32	\$376.60	3.22%
9	Aldi	48	\$412.60	3.19%	44	\$344.50	2.95%
10	Shoppers	13	\$383.00	2.96%	14	\$390.90	3.34%
		488	\$12,884.66	99.50%	479	\$11,609.02	99.31%

The chart above 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 as well as the independent cities of Alexandria, Fairfax, Falls Church and Fredericksburg in VA. Petroleum sales are not included. () Name in parentheses indicates another banner used by the company.

Total supermarket sales for the area are \$12.95 billion.

Source: Food World, June 2021

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- Of those who use grocery advertising, **40%** say they rely most on newspaper advertising (24% on newspaper circulars and 16% on printed ads), followed by **13%** who rely most on mail advertising delivered to the home.
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Sources: 2020 Advertising Usage and Consumer Attitudes Study; Nielsen Scarborough Release 2 2020

21-0371-02

Washington Market Leaders:

Giant, Safeway Pace All Retailers; Alternate Channels Led By CVS, Costco Continue To Make Inroads

- Alts. Now Control 32.7%
- Giant Keeps Commanding Lead
- CVS Still Dominant Drug Chain
- Target, Walmart Control 9.8%
- Costco, BJ's Share Grows To 6.6%

Rank	Company	2021 Stores	2021 Sales (in millions)	% of 2021 Market	2020 Stores	2020 Sales (in millions)	% of 2020 Market
1	Giant Food	113	\$4,143.33	18.81%	112	\$3,902.72	19.38%
2	Albertsons (Balducci's/S-way)	86	\$2,048.93	9.30%	82	\$1,703.90	8.46%
3	International Markets	101	\$1,517.80	6.89%	101	\$1,402.30	6.96%
4	CVS	259	\$1,514.60	6.88%	254	\$1,426.40	7.08%
5	Harris Teeter	43	\$1,427.60	6.48%	44	\$1,278.30	6.35%
6	Walmart	40	\$1,232.40	5.59%	40	\$1,134.90	5.64%
7	Wegmans	12	\$1,134.90	5.15%	11	\$978.10	4.86%
8	Costco	17	\$1,116.20	5.07%	17	\$1,023.60	5.08%
9	7-Eleven	527	\$974.90	4.43%	519	\$921.60	4.58%
10	Target (Super Target)	49	\$918.90	4.17%	48	\$780.10	3.87%
11	Whole Foods	22	\$902.60	4.10%	21	\$798.50	3.97%
12	Walgreens	98	\$551.00	2.50%	96	\$515.70	2.56%
13	Trader Joe's	18	\$489.60	2.22%	18	\$433.20	2.15%
14	Food Lion	32	\$424.30	1.93%	32	\$376.60	1.87%
15	Aldi	48	\$412.60	1.87%	44	\$344.50	1.71%
16	Shoppers	13	\$383.00	1.74%	14	\$390.90	1.94%
17	Weis Markets	24	\$353.13	1.60%	25	\$307.20	1.53%
18	BJ's Wholesale Club	9	\$339.40	1.54%	9	\$302.70	1.50%
19	Wawa	41	\$291.26	1.32%	39	\$275.49	1.37%
20	Military Commissaries	8	\$256.51	1.16%	8	\$250.84	1.25%
		1,560	\$20,432.96	92.76%	1,534	\$18,547.55	92.11%

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, Kmart, Target and Walmart are extrapolated to include comparable categories, as explained in the formula on page 99. 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 as well as 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: \$22.03 billion.** Source: Food World, June 2021

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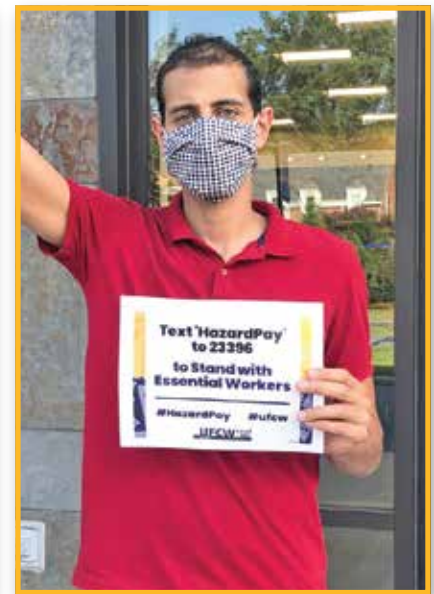
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Baltimore Supermarket Leaders:

Among Supers, Giant Food Continues Dominance Over Safeway, Weis, Wegmans In \$5.1B Market

- Giant Extends Share To 32.9%
- Safeway Remodels Aid Growth
- Wegmans Is Per-Store Avg. Leader
- Weis Enjoys Strong Comp Sales
- Int'l. Markets Impact Region

Rank	Company	2021 Stores	2021 Sales (in millions)	% of 2021 Market	2020 Stores	2020 Sales (in millions)	% of 2020 Market
1	Giant Food	40	\$1,671.66	32.89%	39	\$1,478.74	32.59%
2	Albertsons (Acme/S-way)	26	\$701.60	13.81%	26	\$596.30	13.14%
3	Weis Markets	25	\$503.25	9.90%	26	\$454.50	10.02%
4	Wegmans	5	\$442.10	8.70%	5	\$413.20	9.11%
5	ShopRite (Klein's/Village/PR)	12	\$383.00	7.54%	13	\$336.70	7.42%
6	Shoppers	10	\$270.40	5.32%	10	\$252.80	5.57%
7	International Markets	19	\$258.90	5.09%	19	\$238.00	5.25%
8	Food Lion	20	\$229.10	4.51%	20	\$202.00	4.45%
9	Harris Teeter	6	\$226.90	4.46%	6	\$200.30	4.41%
10	B. Green (Food Depot/Green Valley)	8	\$198.70	3.91%	8	\$173.00	3.81%
		171	\$4,885.61	96.13%	172	\$4,345.54	95.78%

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.

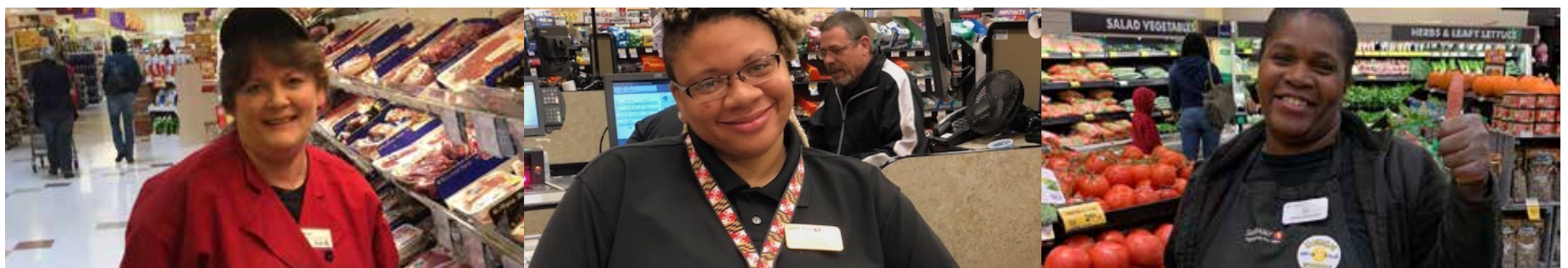
Total supermarket sales for the area are \$5.08 billion.

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

Source: Food World, June 2021



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Baltimore Market Leaders:

Giant Food Extends All-Channel Share Lead Over Walmart; Safeway, Weis Enjoy Strong Sales

- Alts. Share Now At 33.9%
- Giant Extends All-Channel Lead
- Walmart Aided By E-Commerce
- Mass Merchants' Share Is 10.6%
- Costco, BJ's, Sam's Control 8.3%

Rank	Company	2021 Stores	2021 Sales (in millions)	% of 2021 Market	2020 Stores	2020 Sales (in millions)	% of 2020 Market
1	Giant Food	40	\$1,671.66	16.61%	39	\$1,478.74	16.28%
2	Walmart (SuperCenter)	23	\$753.30	7.48%	23	\$695.60	7.66%
3	Albertsons (Acme/S-way)	26	\$701.60	6.97%	26	\$596.30	6.56%
4	Weis Markets	25	\$503.25	5.00%	26	\$454.50	5.00%
5	CVS	89	\$469.30	4.66%	85	\$426.30	4.69%
6	Walgreens	83	\$449.20	4.46%	84	\$433.90	4.78%
7	Wegmans	5	\$442.10	4.39%	5	\$413.20	4.55%
8	ShopRite (Klein's/Village/PR)	12	\$383.00	3.81%	13	\$336.70	3.71%
9	7-Eleven	179	\$321.80	3.20%	183	\$312.90	3.44%
10	Target	18	\$316.00	3.14%	18	\$271.20	2.99%
11	Sam's Club	6	\$289.30	2.87%	6	\$261.30	2.88%
12	Costco	5	\$275.70	2.74%	5	\$253.30	2.79%
13	Royal Farm Stores	116	\$271.30	2.70%	104	\$207.20	2.28%
14	Shoppers	10	\$270.40	2.69%	10	\$252.80	2.78%
15	BJ's Wholesale Club	7	\$266.20	2.64%	7	\$236.90	2.61%
16	International Markets	19	\$258.90	2.57%	19	\$238.00	2.62%
17	Food Lion	20	\$229.10	2.28%	20	\$202.00	2.22%
18	Harris Teeter	6	\$226.90	2.25%	6	\$200.30	2.21%
19	B. Green (Food Depot/Green Valley)	8	\$198.70	1.97%	8	\$173.00	1.90%
20	Aldi	26	\$193.00	1.92%	25	\$168.00	1.85%
		723	\$8,490.71	84.36%	712	\$7,612.14	83.80%

The chart above 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, Kmart, Target and Walmart are extrapolated to include comparable categories, as explained in the formula on page 99. Petroleum sales are not included. Counties/cities included are: Anne Arundel, Baltimore City, Baltimore, Carroll, Harford, Howard and Queen Anne's. () Indicates another banner used by the company. **Total food sales for the area are: \$10.07 billion.** Source: Food World, June 2021

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IN REVIEW: WALMART

State	County	2021 Stores	2021 Sales (in millions)	2021 County Food Sales	% of 2021 County Market	2020 Stores	2020 Sales (in millions)	% of 2020 County Market
DC	Washington (SuperCenter)	3	\$99.70	\$2,414.60	4.13%	3	\$93.70	4.27%
DC Recap: 3 stores with sales of \$99.7 million. Total retail food sales for DC in the study: \$2.41 billion. Walmart share of DC is 4.13%.								
DE	Kent (SuperCenter)	2	\$59.20	\$515.80	11.48%	2	\$55.80	11.96%
DE	Sussex (SuperCenter)	4	\$128.40	\$966.30	13.29%	4	\$119.70	13.84%
DE Recap: 6 stores with sales of \$187.6 million. Total retail food sales for DE in the study: \$1.48 billion. Walmart share of DE is 12.66%.								
MD	Anne Arundel (SuperCenter)	4	\$144.50	\$2,275.40	6.35%	4	\$133.20	6.53%
MD	Baltimore County (SuperCenter)	10	\$341.60	\$3,273.90	10.43%	10	\$314.70	10.74%
MD	Calvert (SuperCenter)	2	\$57.50	\$387.30	14.85%	2	\$53.20	15.21%
MD	Caroline (SuperCenter)	1	\$38.10	\$82.20	46.35%	1	\$35.20	46.19%
MD	Carroll (SuperCenter)	4	\$107.20	\$663.10	16.17%	4	\$99.30	16.68%
MD	Cecil (SuperCenter)	2	\$56.80	\$279.30	20.34%	2	\$53.10	21.10%
MD	Charles	2	\$40.30	\$516.30	7.81%	2	\$37.80	8.40%
MD	Dorchester (SuperCenter)	1	\$25.20	\$56.70	44.44%	1	\$23.40	39.46%
MD	Frederick (SuperCenter)	2	\$103.70	\$907.30	11.43%	2	\$95.90	11.59%
MD	Harford (SuperCenter)	3	\$89.10	\$1,020.80	8.73%	3	\$82.60	8.89%
MD	Howard (SuperCenter)	2	\$70.90	\$1,175.20	6.03%	2	\$65.80	6.04%
MD	Montgomery	1	\$35.30	\$3,640.10	0.97%	1	\$32.90	0.96%
MD	Prince George's	4	\$78.40	\$3,085.20	2.54%	4	\$72.10	2.54%
MD	St. Mary's (SuperCenter)	1	\$53.90	\$396.70	13.59%	1	\$48.30	13.70%
MD	Talbot	1	\$20.90	\$217.10	9.63%	1	\$19.90	10.14%
MD	Washington (SuperCenter)	2	\$104.30	\$520.60	20.03%	2	\$96.20	20.86%
MD	Wicomico (SuperCenter)	2	\$70.80	\$279.40	25.34%	2	\$66.10	25.09%
MD	Worcester (SuperCenter)	2	\$72.80	\$230.70	31.56%	2	\$67.40	32.14%
MD Recap: 46 stores with sales of \$1.51 billion. Total retail food sales for MD in the study: \$20.8 billion. Walmart share of MD is 7.26%.								
PA	Adams	1	\$20.40	\$200.40	10.18%	1	\$18.90	10.21%
PA	Cumberland (SuperCenter)	4	\$113.70	\$1,138.40	9.99%	4	\$104.20	10.34%
PA	Dauphin (SuperCenter)	2	\$77.40	\$1,022.10	7.57%	2	\$71.80	7.75%
PA	Franklin (SuperCenter)	2	\$79.20	\$459.90	17.22%	2	\$73.70	17.82%
PA	Lancaster (SuperCenter)	3	\$128.80	\$1,740.00	7.40%	3	\$118.70	7.63%
PA	Lebanon (SuperCenter)	2	\$82.10	\$409.60	20.04%	2	\$76.90	20.27%
PA	York (SuperCenter)	6	\$205.50	\$1,569.30	13.10%	6	\$188.60	13.27%
PA Recap: 20 stores with sales of \$707.1 million. Total retail food sales for PA in the study: \$6.65 billion. Walmart share of PA is 10.63%.								
VA	Accomack (SuperCenter)	1	\$31.30	\$96.90	32.30%	1	\$29.90	34.81%
VA	Albemarle (SuperCenter)	1	\$36.80	\$641.70	5.73%	1	\$34.10	5.88%
VA	Chesapeake City (SuperCenter)	6	\$158.70	\$883.10	17.97%	6	\$146.20	17.82%
VA	Chesterfield (SuperCenter)	6	\$230.70	\$1,443.60	15.98%	6	\$217.40	16.72%
VA	Culpeper (SuperCenter)	1	\$30.40	\$164.80	18.45%	1	\$28.40	20.21%
VA	Dinwiddie (SuperCenter)	1	\$40.40	\$131.10	30.82%	1	\$37.30	30.28%
VA	Essex (SuperCenter)	1	\$39.00	\$61.80	63.11%	1	\$36.10	62.78%
VA	Fairfax (SuperCenter)	8	\$230.60	\$5,331.40	4.33%	8	\$211.30	4.36%
VA	Fauquier (SuperCenter)	1	\$36.10	\$176.90	20.41%	1	\$33.90	20.38%
VA	Frederick (SuperCenter)	3	\$141.80	\$496.30	28.57%	3	\$130.60	28.56%
VA	Gloucester (SuperCenter)	1	\$33.90	\$122.40	27.70%	1	\$31.60	27.99%
VA	Hampton/Newport News (SC/Neighborhood Mkt)	5	\$149.60	\$1,121.80	13.34%	5	\$137.20	13.07%
VA	Hanover (SC/Neighborhood Mkt)	3	\$102.10	\$460.90	22.15%	3	\$94.80	22.34%
VA	Henrico (SC/Neighborhood Mkt)	7	\$268.50	\$1,905.30	14.09%	7	\$250.20	14.24%
VA	James City (SC/Neighborhood Mkt)	2	\$70.80	\$409.60	17.29%	2	\$66.50	17.44%
VA	King George (SuperCenter)	1	\$33.90	\$90.80	37.33%	1	\$31.50	37.41%
VA	Lancaster (SuperCenter)	1	\$34.20	\$79.50	43.02%	1	\$30.70	38.47%

IN REVIEW: WALMART

State	County	2021 Stores	2021 Sales (in millions)	2021 County Food Sales	% of 2021 County Market	2020 Stores	2020 Sales (in millions)	% of 2020 County Market
VA	Loudoun (SuperCenter)	3	\$115.40	\$1,472.40	7.84%	3	\$107.80	7.82%
VA	Norfolk City (SC/Neighborhood Mkt)	4	\$152.30	\$754.70	20.18%	4	\$140.70	19.59%
VA	Nottoway (SuperCenter)	1	\$33.60	\$37.30	90.08%	1	\$30.90	86.31%
VA	Orange (SuperCenter)	2	\$62.80	\$120.60	52.07%	2	\$58.40	53.48%
VA	Page (SuperCenter)	1	\$37.20	\$69.30	53.68%	1	\$34.90	53.86%
VA	Portsmouth City (SuperCenter)	1	\$30.40	\$273.50	11.12%	1	\$28.30	10.14%
VA	Powhatan (SuperCenter)	1	\$37.00	\$73.70	50.20%	1	\$34.70	51.10%
VA	Prince William (SuperCenter)	5	\$113.60	\$1,856.40	6.12%	5	\$105.30	6.24%
VA	Shenandoah (SuperCenter)	1	\$35.70	\$119.10	29.97%	1	\$33.00	30.33%
VA	Southampton (SuperCenter)	1	\$41.20	\$90.00	45.78%	1	\$38.30	45.81%
VA	Spotsylvania (SuperCenter)	4	\$154.30	\$767.80	20.10%	4	\$142.10	20.48%
VA	Stafford (SuperCenter)	2	\$63.90	\$428.40	14.92%	2	\$52.20	14.25%
VA	Suffolk City (SuperCenter)	2	\$70.60	\$303.80	23.24%	2	\$66.30	23.87%
VA	Virginia Beach (SC/Neighborhood Mkt)	7	\$229.50	\$1,654.60	13.87%	7	\$209.40	13.97%
VA	Warren (SuperCenter)	1	\$39.30	\$146.80	26.77%	1	\$36.80	26.25%
VA	York (SuperCenter)	1	\$38.70	\$179.80	21.52%	1	\$35.90	21.93%

VA Recap: 86 stores with sales of \$2.92 billion. Total retail food sales for VA in the study: \$23.5 billion. Walmart share of VA is 12.44%.

Mid-Atlantic Recap: 161 stores with sales of \$5.43 billion annually. Mid-Atlantic retail food sales total: \$54.9 billion.

Walmart Per Store Average: \$ 33.73 million

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

Source: *Food World*, June 2021

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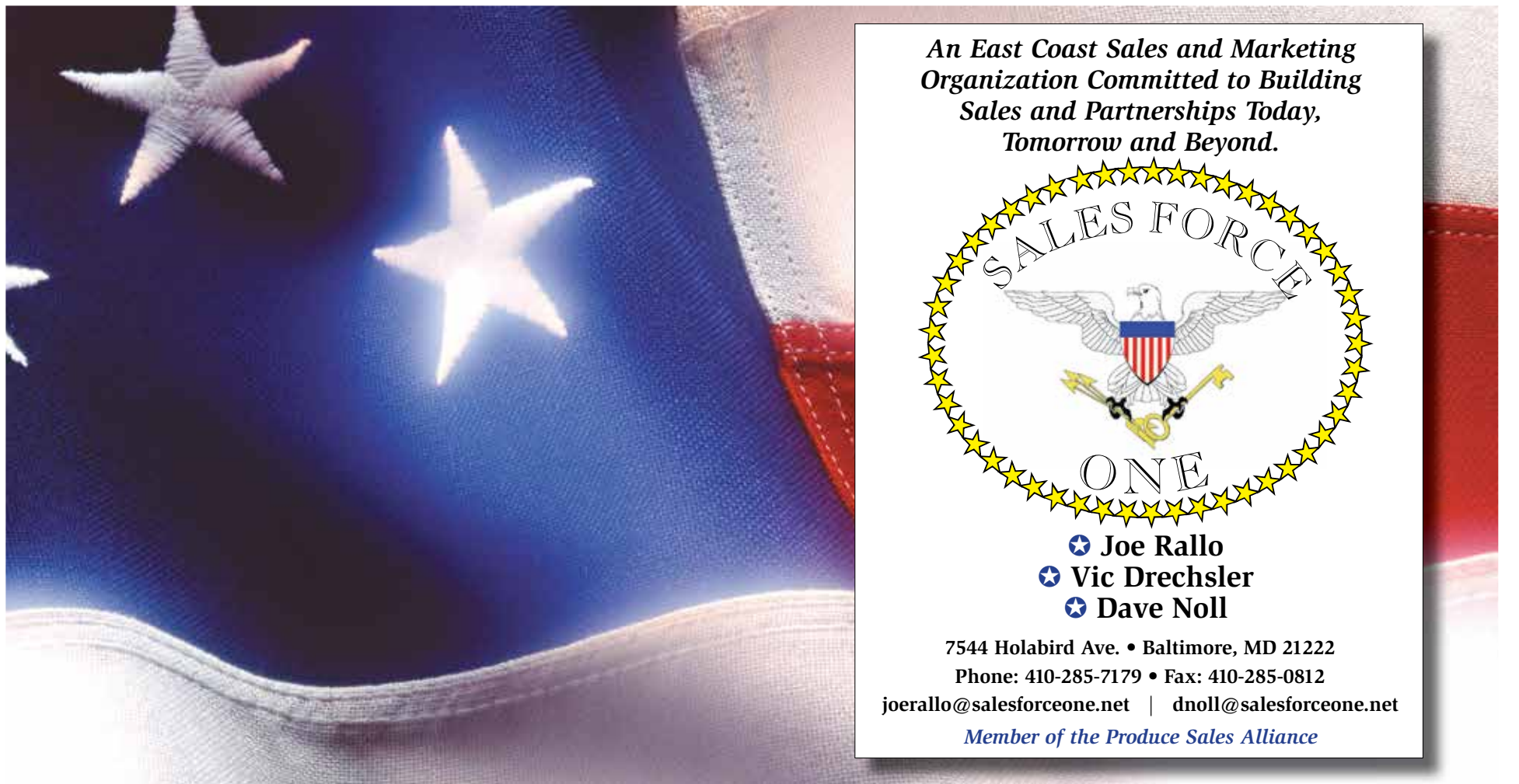
Baltimore-Washington Supermarket Leaders:

Giant, Safeway, International Markets, Harris Teeter, Wegmans Control 75.3% Of \$18.1B Market

- Giant Controls Nearly 33%
- Pandemic Sales Buoy Safeway
- Int'l. Mkts. Now Significant Factor
- Whole Foods Adds DC Unit
- Shoppers Continues To Shrink

Rank	Company	2021 Stores	2021 Sales (in millions)	% of 2021 Market	2020 Stores	2020 Sales (in millions)	% of 2020 Market
1	Giant Food	153	\$5,814.99	32.25%	151	\$5,381.46	33.18%
2	Albertsons (Acme//Balducci/S-way)	112	\$2,750.53	15.25%	108	\$2,300.20	14.18%
3	International Markets	120	\$1,776.70	9.85%	120	\$1,640.30	10.11%
4	Harris Teeter	49	\$1,654.50	9.18%	50	\$1,478.60	9.12%
5	Wegmans	17	\$1,577.00	8.75%	16	\$1,391.30	8.58%
6	Whole Foods	26	\$1,059.20	5.87%	25	\$943.30	5.82%
7	Weis Markets	49	\$856.38	4.75%	51	\$761.70	4.70%
8	Food Lion	52	\$653.40	3.62%	52	\$578.60	3.57%
9	Shoppers	23	\$653.40	3.62%	24	\$643.70	3.97%
10	Aldi	74	\$605.60	3.36%	69	\$512.50	3.16%
		675	\$17,401.70	96.50%	666	\$15,631.66	96.37%

Chartlists the top 10 supermarket retailers in the Baltimore-Washington market. Counties/cities included are: Washington, DC; Anne Arundel, Baltimore 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, Prince William, Spotsylvania, Stafford and Warren as well as the independent cities of Alexandria, Fairfax, Falls Church and Fredericksburg in VA. Petroleum sales are not included. **Total supermarket sales for the area are \$18.03 billion.** Source: *Food World*, June 2021



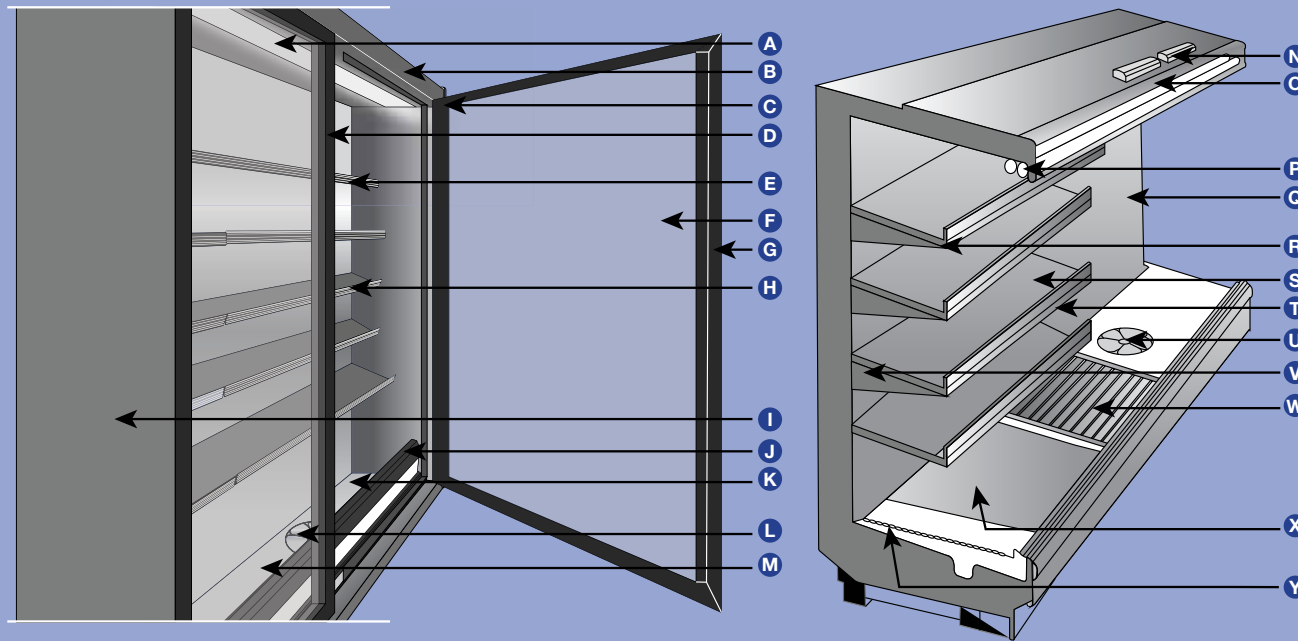
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| G. Gaskets for all types of Doors: Solid and Glass | S. Solid Shelves to fit all major brands of Supermarket Cases |
| H. Price Tag Moldings | T. Price Tag Moldings |
| I. Case Ends | U. Fans/Fan Motors/Fan Blades |
| J. Wire Bottom Racks | V. Brackets (when available) |
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Baltimore-Washington Market Leaders:

Mass Merchants, Clubs Continue To Impact Share Of Market, But Giant, Safeway Still In Control

- Alts. B-W Share Now At 32.5%
- Giant Tops All, Share At 18.1%
- Walmart Jumps To #3
- Mass Merchants' Share At 10%
- Costco, BJ's, Sam's Grab 7.7%

Rank	Company	2021 Stores	2021 Sales (in millions)	% of 2021 Market	2020 Stores	2020 Sales (in millions)	% of 2020 Market
1	Giant Food	153	\$5,814.99	18.12%	151	\$5,381.46	18.42%
2	Albertsons (Acme/Balducci/S-way)	112	\$2,750.53	8.57%	108	\$2,300.20	7.87%
3	Walmart (SuperCenter)	63	\$1,985.70	6.19%	63	\$1,830.50	6.26%
4	CVS	348	\$1,983.90	6.18%	339	\$1,852.70	6.34%
5	International Markets	120	\$1,776.70	5.54%	120	\$1,640.30	5.61%
6	Harris Teeter	49	\$1,654.50	5.16%	50	\$1,478.60	5.06%
7	Wegmans	17	\$1,577.00	4.91%	16	\$1,391.30	4.76%
8	Costco	22	\$1,391.90	4.34%	22	\$1,276.90	4.37%
9	7-Eleven	706	\$1,296.70	4.04%	702	\$1,234.50	4.22%
10	Target (Super Target)	67	\$1,234.90	3.85%	66	\$1,051.30	3.60%
11	Whole Foods	26	\$1,059.20	3.30%	25	\$943.30	3.23%
12	Walgreens	181	\$1,000.20	3.12%	180	\$949.60	3.25%
13	Weis Markets	49	\$856.38	2.67%	51	\$761.70	2.61%
14	Food Lion	52	\$653.40	2.04%	52	\$578.60	1.98%
15	Shoppers	23	\$653.40	2.04%	24	\$643.70	2.20%
16	Aldi	74	\$605.60	1.89%	69	\$512.50	1.75%
17	BJ's Wholesale Club	16	\$605.60	1.89%	16	\$539.60	1.85%
18	Trader Joe's	22	\$574.10	1.79%	22	\$506.90	1.73%
19	Sam's Club	11	\$463.60	1.44%	11	\$419.40	1.44%
20	Wawa	70	\$450.49	1.40%	67	\$434.63	1.49%
		2,181	\$28,388.79	88.46%	2,154	\$25,727.69	88.05%

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, Kmart, Target and Walmart are extrapolated to include comparable categories, as explained in the formula on page 99. Petroleum sales are not included. Counties/cities included are: Washington, DC; Anne Arundel, Baltimore 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, Prince William, Spotsylvania, Stafford and Warren as well as independent cities of Alexandria, Fairfax, Falls Church and Fredericksburg in VA. () Alternate banner. **Total food sales for the area are: \$32.09 billion.** Source: Food World, June 2021

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IN REVIEW: HARRIS TEETER

State	County	2021 Stores	2021 Sales (in millions)	2021 County Food Sales	% of 2021 County Market	2020 Stores	2020 Sales (in millions)	% of 2020 County Market
DC	Washington	4	\$191.60	\$2,414.60	7.94%	4	\$168.70	7.68%
DC Recap: 4 stores with sales of \$191.6 million. Total retail food sales for DC in the study: \$2.41 billion. Harris Teeter share of DC is 7.94%.								
DE	Sussex	2	\$39.70	\$966.30	4.11%	2	\$35.20	4.07%
DE Recap: 2 stores with sales of \$39.7 million. Total retail food sales for DE in the study: \$1.48 billion. Harris Teeter share of DE is 2.68%.								
MD	Anne Arundel	1	\$35.30	\$2,275.40	1.55%	1	\$31.80	1.56%
MD	Baltimore City	2	\$80.20	\$1,520.20	5.28%	2	\$70.40	5.15%
MD	Calvert	1	\$21.00	\$387.30	5.42%	1	\$18.40	5.26%
MD	Howard	3	\$111.40	\$1,175.20	9.48%	3	\$98.10	9.00%
MD	Montgomery	7	\$182.70	\$3,640.10	5.02%	7	\$159.20	4.67%
MD	Prince George's	2	\$39.80	\$3,085.20	1.29%	2	\$34.30	1.21%
MD	St. Mary's	1	\$25.80	\$396.70	6.50%	1	\$23.50	6.66%
MD	Talbot	1	\$26.10	\$217.10	12.02%	1	\$23.10	11.77%
MD Recap: 18 stores with sales of \$522.3 million. Total retail food sales for MD in the study: \$20.8 billion. Harris Teeter share of MD is 2.51%.								
VA	Albemarle	3	\$73.70	\$641.70	11.49%	3	\$65.20	11.25%
VA	Arlington	6	\$260.60	\$949.80	27.44%	6	\$227.30	26.88%
VA	Chesapeake City	3	\$77.30	\$883.10	8.75%	3	\$68.40	8.34%
VA	Fairfax	9	\$346.50	\$5,331.40	6.50%	9	\$302.60	6.24%
VA	Fauquier	1	\$18.90	\$176.90	10.68%	1	\$17.10	10.28%
VA	Hampton/Newport News	2	\$40.60	\$1,121.80	3.62%	2	\$35.80	3.41%
VA	James City	3	\$102.70	\$409.60	25.07%	3	\$89.60	23.50%
VA	Loudoun	9	\$235.30	\$1,472.40	15.98%	10	\$234.90	17.03%
VA	Norfolk City	3	\$68.70	\$754.70	9.10%	3	\$60.20	8.38%
VA	Portsmouth City	1	\$23.80	\$273.50	8.70%	1	\$21.10	7.56%
VA	Prince William	4	\$131.20	\$1,856.40	7.07%	4	\$115.80	6.86%
VA	Suffolk City	1	\$27.00	\$303.80	8.89%	1	\$24.40	8.78%
VA	Virginia Beach	9	\$201.10	\$1,654.60	12.15%	9	\$176.20	11.76%
VA Recap: 54 stores with sales of \$1.61 billion. Total retail food sales for VA in the study: \$23.56 billion. Harris Teeter share of VA is 6.84%.								

Mid-Atlantic Recap: 78 stores with sales of \$2.36 billion annually. Mid-Atlantic retail food sales total: \$54.9 billion.

Harris Teeter Per Store Average: \$30.27 million

Source: Food World, June 2021

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IN REVIEW: GIANT FOOD

State	County	2021 Stores	2021 Sales (in millions)	2021 County Food Sales	% of 2021 County Market	2020 Stores	2020 Sales (in millions)	% of 2020 County Market
DC	Washington	7	\$282.40	\$2,414.60	11.70%	7	\$278.18	12.66%
DC Recap: 7 stores with sales of \$282.4 million. Total retail food sales for DC in the study: \$2.41 billion. Giant Food share of DC is 12.66%.								
DE	Sussex	3	\$172.66	\$966.30	17.87%	4	\$147.04	17.00%
DE Recap: 3 stores with sales of \$172.66 million. Total retail food sales for DE in the study: \$1.48 billion. Giant Food share of DE is 11.65%.								
MD	Anne Arundel	9	\$441.80	\$2,275.40	19.42%	9	\$393.06	19.27%
MD	Baltimore City	7	\$285.91	\$1,520.20	18.81%	6	\$235.99	17.25%
MD	Baltimore County	14	\$545.20	\$3,273.90	16.65%	14	\$484.62	16.54%
MD	Calvert	3	\$146.78	\$387.30	37.90%	3	\$127.17	36.37%
MD	Carroll	1	\$39.16	\$663.10	5.91%	1	\$32.44	5.45%
MD	Charles	2	\$86.47	\$516.30	16.75%	2	\$70.45	15.66%
MD	Frederick	3	\$117.78	\$907.30	12.98%	3	\$101.69	12.29%
MD	Harford	2	\$78.29	\$1,020.80	7.67%	2	\$66.06	7.11%
MD	Howard	7	\$281.30	\$1,175.20	23.94%	7	\$266.57	24.45%
MD	Montgomery	26	\$1,016.72	\$3,640.10	27.93%	26	\$1,046.43	30.67%
MD	Prince George's	17	\$595.69	\$3,085.20	19.31%	17	\$534.03	18.83%
MD	St. Mary's	1	\$37.45	\$396.70	9.44%	1	\$30.43	8.63%
MD	Talbot	1	\$36.96	\$217.10	17.02%	1	\$31.10	15.85%
MD Recap: 93 stores with sales of \$3.71 billion. Total retail food sales for MD in the study: \$20.8 billion. Giant Food share of MD is 17.82%.								
VA	Albemarle	1	\$35.70	\$641.70	5.56%	1	\$33.39	5.76%
VA	Arlington	4	\$114.14	\$949.80	12.02%	4	\$114.52	13.54%
VA	Fairfax	29	\$1,064.02	\$5,331.40	19.96%	28	\$1,002.29	20.66%
VA	Fauquier	1	\$32.69	\$176.90	18.48%	1	\$29.47	17.72%
VA	Loudoun	9	\$258.70	\$1,472.40	17.57%	9	\$243.56	17.66%
VA	Prince William	7	\$218.61	\$1,856.40	11.78%	7	\$186.08	11.02%
VA	Spotsylvania	2	\$89.67	\$767.80	11.68%	2	\$71.11	10.25%
VA	Stafford	3	\$119.66	\$428.40	27.93%	3	\$97.74	26.69%
VA Recap: 56 stores with sales of \$1.93 billion. Total retail food sales for VA in the study: \$23.56 billion. Giant Food share of VA is 8.23%.								

Mid-Atlantic Recap: 159 stores with sales of \$6.1 billion annually. Mid-Atlantic retail food sales total: \$54.9 billion.

Giant Food Per Store Average: \$38.85 million

Source: Food World, June 2021

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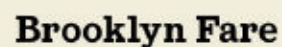
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FOOD WORLD'S LEADING INDEPENDENTS: 2021

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

Rank	Company	2021 Supermarkets	2021 (in millions)	2020 Supermarkets	2020 (in millions)	Headquarters	Primary Supplier
1	B. Green (Food Depot/Green Valley/Shoppers Value)	11	\$217.70	11	\$190.30	Baltimore, MD	UNFI
2	Karns Prime & Fancy Foods	9	\$171.00	9	\$154.00	Mechanicsburg, PA	UNFI
3	Family Owned Markets	9	\$159.78	8	\$131.10	Millersville, PA	MDI
4	Streets Market	11	\$90.00	9	\$61.90	Washington, DC	UNFI
5	McKay's Food & Drug	5	\$64.60	3	\$46.70	Hollywood, MD	UNFI
6	Graul's	6	\$62.00	6	\$60.80	Baltimore, MD	UNFI
7	Sharp Shopper	4	\$50.50	5	\$56.40	Ephrata, PA	Direct
8	Eddie's of Roland Park	2	\$39.30	2	\$34.60	Baltimore, MD	Bozzuto's
9	Geresbeck's Food Market	3	\$34.40	3	\$31.40	Baltimore, MD	C&S
10	Roots Markets	2	\$22.30	2	\$20.90	Clarksville, MD	UNFI
11	Compare Foods	5	\$20.60	0	\$0.00	Raleigh, NC	UNFI
12	Tri-State Co-Op	1	\$14.48	1	\$13.80	Lindenwold, NJ	UNFI
13	Boyer's Markets	1	\$10.66	1	\$9.51	Orwigsburg, PA	UNFI
GRAND TOTAL		69	\$957.32	60			\$811.41

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

Source: *Food World*, June 2021

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IN REVIEW: COSTCO

State	County	2021 Stores	2021 Sales (in millions)	2021 County Food Sales	% of 2021 County Market	2020 Stores	2020 Sales (in millions)	% of 2020 County Market
DC	Washington	1	\$60.80	\$2,414.60	2.52%	1	\$55.10	2.51%
DC Recap: 1 store with sales of \$60.8 million. Total retail food sales for DC in the study: \$2.41 billion. Costco share of DC is 2.52%.								
MD	Anne Arundel	2	\$106.10	\$2,275.40	4.66%	2	\$97.50	4.78%
MD	Baltimore County	2	\$114.70	\$3,273.90	3.50%	2	\$105.70	3.61%
MD	Frederick	1	\$51.10	\$907.30	5.63%	1	\$47.60	5.75%
MD	Howard	1	\$54.90	\$1,175.20	4.67%	1	\$50.10	4.60%
MD	Montgomery	2	\$160.50	\$3,640.10	4.41%	2	\$147.40	4.32%
MD	Prince George's	3	\$163.80	\$3,085.20	5.31%	3	\$150.60	5.31%
MD Recap: 11 stores with sales of \$651.1 million. Total retail food sales for MD in the study: \$20.8 billion. Costco share of MD is 3.13%.								
PA	Dauphin	1	\$50.70	\$1,022.10	4.96%	1	\$45.30	4.89%
PA	Lancaster	1	\$31.80	\$1,740.00	1.83%	1	\$29.90	1.92%
PA Recap: 2 stores with sales of \$82.5 million. Total retail food sales for PA in the study: \$6.65 billion. Costco share of PA is 1.24%.								
VA	Albemarle	1	\$37.60	\$641.70	5.86%	1	\$34.70	5.99%
VA	Arlington	1	\$66.80	\$949.80	7.03%	1	\$61.40	7.26%
VA	Chesterfield	1	\$47.10	\$1,443.60	3.26%	1	\$43.20	3.32%
VA	Fairfax	4	\$357.30	\$5,331.40	6.70%	4	\$326.50	6.73%
VA	Frederick	1	\$55.20	\$496.30	11.12%	1	\$41.80	9.14%
VA	Hampton/Newport News	1	\$37.10	\$1,121.80	3.31%	1	\$33.90	3.23%
VA	Henrico	1	\$43.90	\$1,905.30	2.30%	1	\$39.50	2.25%
VA	Loudoun	2	\$148.20	\$1,472.40	10.07%	2	\$135.40	9.82%
VA	Norfolk City	1	\$44.10	\$754.70	5.84%	1	\$39.60	5.51%
VA	Prince William	2	\$76.50	\$1,856.40	4.12%	2	\$70.20	4.16%
VA	Spotsylvania	1	\$31.20	\$767.80	4.06%	1	\$29.40	4.24%
VA Recap: 16 stores with sales of \$945.0 million. Total retail food sales for VA in the study: \$23.56 billion. Costco share of VA is 4.02%.								
Mid-Atlantic Recap: 30 stores with sales of \$1.74 billion annually. Mid-Atlantic retail food sales total: \$54.9 billion. Costco Per Store Average: \$57.98 million								

Source: Food World, June 2021



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TAKING STOCK

from page 16

which, like a lot of retailers, saw sales balloon during the first few months of the pandemic. Harris Teeter is steadily increasing its penetration in the market with new stores slated to open in Washington, DC (Howard University); Alexandria, VA; Falls Church, VA; Kent Island, MD; and a replacement unit in Arlington, VA. Harris Teeter's strengths are not only its differentiated offerings but also its excellent locations, its store operations consistency and its strong management team led by president Rod Antolock.

Wegmans - The Rochester, NY-based uber retailer had a productive last 12 months, but it could have been a lot better if it weren't forced to close or impose restrictions on several of its service departments including its soup, specialty and salad bars because of COVID-19. This necessity clearly impacted sales and some of those features won't be returning, at least in their former incarnations. Wegmans' signature play was always its stores - large food palaces that drew more customers (and higher sales) than any other food merchant in the market. While the family-owned retailer has offered a decent e-commerce platform for the past several years, its focus had been on attracting customers to its physical stores to take part in the experience. Nobody foresaw a pandemic.

Shoppers - RIP (almost). So, the sales tailwinds of COVID-19 created an opportunity for Shoppers to temporarily take down its "for sale" sign. That boom period is already waning, and it won't be too long before the once dynamic merchant seeks to sell its remaining 23 stores. By that time, Steve "Senor Spinmeister" Spinner, CEO of parent firm UNFI, will likely have retired and the company's other retail division, Cub Foods, will likely be up for sale, too. It's a sad legacy for many of the company's past and present associates who have been led on a slow and twisting journey down the rathole.

Amazon Fresh Opens First E. Coast Store; New Locations Revealed

To put it bluntly, the debut of the Amazon Fresh (AF) store in Franconia (Alexandria), VA late last month was a bit underwhelming. Of course, my view comes as somebody who's written about the industry for almost 50 years and is more analytical than most of the 35 year olds who visited the store on opening day.

And to be fair, the new "scan & go" Dash Cart technology that AF is utilizing is impressive, if somewhat limiting - the "smart" shopping carts are designed to hold only two paper shopping bags.

The store itself reminded me of a "poor man's" Whole Foods but with a more differentiated product mix than its big sister - conventional items like Coke, Frito-Lay, Chips Ahoy are carried that can't be found at a WFM. At 30,000 square feet with limited fresh departments (excluding produce, which was first rate), you would be hard-pressed to do all of your weekly shopping at the former Shoppers unit. The service meat, seafood and deli departments did not offer much variety and center store varied little from a typical supermarket. Prices at the store were good, certainly not deep discount but clearly following a modified EDLP format. There was little promotional signage in the store.

Amazon Fresh utilizes the Whole Foods "365" private label as well as its own "Aplenty" brand (an awful name) for snack foods. The store is being supplied from WFM's perishable facility in Landover, MD and the new SpartanNash distribution center in Severn, MD.

Several sources told me that the store is averaging slightly more than \$300,000 a week for its first three weeks, not bad but certainly not eye-opening. Of course, there are many in the trade who believe that the goal of Amazon Fresh is to serve as another fulfillment hub for big daddy amazon.com, and even on opening day we saw several team members assembling orders that were digitally sourced.

The next AF store that will open in the DC area will be at the former Giant Food unit in Chevy Chase on Wisconsin Avenue, which should debut next month.

And just before presstime, we learned of nearly 30 new AF locations that will reportedly open in the Mid-Atlantic. In addition to the previously report-

TAKING STOCK continues on page 53

NEW SUPERMARKET, CLUB STORE & MASS MERCHANT OPENINGS

in the Food World Market

New or replacement stores scheduled to open in the next 36 months.

Aldi	8	Washington, DC (Fort Totten); Newark, DE; Rehoboth Beach, DE; Berlin, MD; Capitol Heights, MD; North Bethesda, MD; Charlottesville, VA*; Haymarket, VA
Amazon Fresh	16	Washington, DC (4) (14th, H St., First St., Dupont Cir.); Bethesda, MD; Chevy Chase, MD (2) (Wisconsin Ave., Connecticut Ave.); Gaithersburg, MD; Alexandria, VA; Arlington, VA; Baileys Crossroads, VA; Fairfax, VA; Falls Church, VA; Franconia, VA*; Lorton, VA; Manassas, VA; Springfield, VA
Fresh World	1	Woodbridge, VA
Giant Food	5	Baltimore, MD (Fort Ave.); Bethesda, MD (r); Fort Washington, MD (r); Silver Spring, MD (r); Manassas, VA (r)
Global Food	1	Baltimore, MD (Security Blvd.)
Harris Teeter	5	Washington, DC (Howard Univ.); Kent Island, MD; Alexandria, VA (King & Beauregard); Arlington, VA (North Glebe Rd.-r); Falls Church, VA
Lidl	15	Bear, DE; Baltimore, MD (2 -Belair Rd., Northwood Commons); Columbia, MD*; Frederick, MD; Montgomery Village, MD; Reisterstown, MD; Hampden Twp., PA; Burke, VA; Chantilly, VA*; Charlottesville, VA; Falls Church, VA; Fredericksburg, VA; Manassas, VA*; Sterling, VA*; Washington, DC (Naylor Rd. & Alabama Ave.)
MOM's Organic Market	1	Silver Spring, MD
Redner's Markets	1	Lewes, DE (Fresh Market)
Streets Market & Cafe	2	Baltimore, MD (2) (Fleet St.*, St. Paul St.*)
Target	2	Wilmington, DE*; Kent Island, MD
Trader Joe's	3	Newark, DE*; Bethesda, MD; White Oak, MD
Wegmans	5	Washington, DC (Wisconsin Ave. & Rodman St.); Greenville, DE; Rockville, MD; Alexandria, VA (Eisenhower Hwy.); Reston, VA
Whole Foods	3	Washington, DC (Glover Park-r); Towson, MD; Falls Church, VA (E. Broad & N. Washington)

(r) - Replacement Store

* Store opened between 4/1/21 - 6/21/21

Source: *Food World*, June 2021

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Contact Ginny Williams or Wayne Hendrickson to learn more.

MARYLAND COUNTY SHARE OF MARKET: 2021

Total sales for those Maryland counties included in this study are \$20.8 billion

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



BALTIMORE CITY (\$1.5 billion)

- Population 593,490
- # of Households 239,116
- Median Income \$50,379
- Under 18 20.2%
- Over 65 14.5%
- Female 53.1%
- White 27.7%
- Black 62.7%
- Hispanic 5.7%
- Asian 2.7%


1	Giant Food	7	\$285.91	18.81%
2	B. Green (Food Depot)	5	\$132.10	8.69%
3	Walgreens	19	\$127.90	8.41%
4	7-Eleven	51	\$94.10	6.19%
5	CVS	16	\$89.80	5.91%
6	Albertsons (Safeway)	3	\$85.41	5.62%
7	Save A Lot	8	\$85.30	5.61%
8	Harris Teeter	2	\$80.20	5.28%
9	Whole Foods	2	\$67.40	4.43%
10	Royal Farm Stores	23	\$51.60	3.39%
11	ShopRite (Price Rite/Klein's)	2	\$51.60	3.39%
12	Rite Aid	11	\$48.60	3.20%
13	International Markets	6	\$45.80	3.01%
14	Shoppers	2	\$42.60	2.80%
15	BJ's Wholesale Club	1	\$35.60	2.34%
16	Aldi	4	\$25.20	1.66%
17	Target	1	\$20.60	1.36%
18	Sprouts	1	\$17.20	1.13%
19	Streets Market	2	\$15.60	1.03%
20	MOM's Organic Market	1	\$14.90	0.98%
21	Wawa	2	\$11.55	0.76%
22	Eddie's of Roland Park	1	\$11.20	0.74%
23	Compare Foods	2	\$8.80	0.58%
24	Great Valu	1	\$6.80	0.45%
25	Circle K	2	\$3.90	0.26%
26	Dash-In	1	\$2.40	0.16%
27	C&S Independents	2	\$1.01	0.07%
		178	\$1,463.08	96.24%



BALTIMORE COUNTY (\$3.3 billion) (Includes Catonsville, Dundalk, Randallstown, Reisterstown)

- Population 827,370
- # of Households 313,519
- Median Income \$76,866
- Under 18 21.6%
- Over 65 17.6%
- Female 52.7%
- White 55.8%
- Black 30.3%
- Hispanic 5.8%
- Asian 6.3%

1	Giant Food	14	\$545.20	16.65%
2	Walmart (SuperCenter)	10	\$341.60	10.43%



ANNE ARUNDEL COUNTY (\$2.3 billion) (Includes Annapolis, Brooklyn Park, Glen Burnie, Linthicum)

- Population 579,234
- # of Households 209,814
- Median Median Income .. \$100,798
- Under 18 22.3%
- Over 65 15.0%
- Female 50.5%
- White 66.7%
- Black 18.3%
- Hispanic 8.4%
- Asian 4.2%

1	Giant Food	9	\$441.80	19.42%
2	Albertsons (Safeway)	8	\$220.53	9.69%
3	Walmart (SuperCenter)	4	\$144.50	6.35%
4	CVS	22	\$116.20	5.11%
5	Costco	2	\$106.10	4.66%
6	Sam's Club	3	\$102.80	4.52%
7	Shoppers	3	\$97.40	4.28%
8	Target	5	\$95.20	4.18%
9	Wegmans	1	\$88.20	3.88%
10	Military Commissaries	2	\$73.40	3.23%
11	Food Lion	5	\$68.30	3.00%
12	7-Eleven	35	\$60.80	2.67%
13	Walgreens	16	\$60.20	2.65%
14	Aldi	6	\$53.90	2.37%
15	Whole Foods	1	\$52.40	2.30%
16	Weis Markets	3	\$47.38	2.08%
17	Wawa	8	\$43.54	1.91%
18	BJ's Wholesale Club	1	\$41.80	1.84%
19	B. Green (Green Valley)	2	\$41.00	1.80%
20	C&S Independents	7	\$38.58	1.70%
21	Harris Teeter	1	\$35.30	1.55%
22	Royal Farm Stores	18	\$33.50	1.47%
23	International Markets	2	\$31.30	1.38%
24	Geresbeck's Food Market	2	\$21.50	0.94%
25	Trader Joe's	1	\$20.10	0.88%
26	Graul's	2	\$19.30	0.85%
27	Sprouts	1	\$17.40	0.76%
28	Fresh Market	1	\$16.30	0.72%
29	Great Valu	2	\$16.10	0.71%
30	Dash-In	9	\$15.50	0.68%
31	Lidl	2	\$14.20	0.62%
32	High's/Baltimore	7	\$12.80	0.56%
33	Rite Aid	3	\$9.60	0.42%
34	Save A Lot	1	\$4.90	0.22%
		195	\$2,261.83	99.40%


See MARYLAND COUNTY SHARE on page 46

MARYLAND COUNTY SHARE OF MARKET: 2021

Continued from page 45

3	Weis Markets	12	\$256.90	7.85%
4	Sam's Club	3	\$186.50	5.70%
5	Wegmans	2	\$161.70	4.94%
6	CVS	27	\$149.80	4.58%
7	Walgreens	26	\$149.50	4.57%
8	Albertsons (Safeway)	6	\$138.21	4.22%
9	International Markets	8	\$126.20	3.85%
10	Royal Farm Stores	48	\$116.70	3.56%
11	Costco	2	\$114.70	3.50%
12	Shoppers	4	\$109.30	3.34%
13	ShopRite (PR/Klein's/Village)	4	\$104.80	3.20%
14	7-Eleven	54	\$104.20	3.18%
15	Target	6	\$96.50	2.95%
16	Aldi	11	\$73.80	2.25%
17	BJ's Wholesale Club	2	\$71.70	2.19%
18	Food Lion	6	\$60.60	1.85%
19	Wawa	7	\$40.05	1.22%
20	C&S Independents	2	\$38.59	1.18%
21	Trader Joe's	2	\$35.80	1.09%
22	Graul's	3	\$32.80	1.00%
23	MOM's Organic Market	2	\$28.80	0.88%
24	Eddie's of Roland Park	1	\$28.10	0.86%
25	Rite Aid	6	\$27.90	0.85%
26	Fresh Market	2	\$24.70	0.75%
27	Lidl	4	\$24.20	0.74%
28	Redner's Markets	1	\$23.90	0.73%
29	Sprouts	1	\$19.20	0.59%
30	Geresbeck's Food Market	1	\$12.90	0.39%
31	High's/Baltimore	6	\$8.70	0.27%
32	Dash-In	3	\$7.20	0.22%
33	Save A Lot	2	\$6.20	0.19%
34	Circle K	2	\$4.80	0.15%
		290	\$3,271.75	99.93%


3	Walmart (SuperCenter)	2	\$57.50	14.85%
4	Weis Markets	3	\$41.50	10.72%
5	Harris Teeter	1	\$21.00	5.42%
6	Wawa	2	\$14.44	3.73%
7	CVS	3	\$14.30	3.69%
8	7-Eleven	7	\$13.90	3.59%
9	Walgreens	2	\$11.10	2.87%
10	Dash-In	2	\$4.30	1.11%
11	C&S Independents	1	\$1.03	0.27%
		28	\$385.67	99.58%



CAROLINE COUNTY (\$82.2 million)
(Includes Denton, Federalsburg, Greensboro)

- Population 33,406
- # of Households 12,024
- Median Income \$58,638
- Under 18 23.6%
- Over 65 16.7%
- Female 51.1%
- White 75.1%
- Black 14.1%
- Hispanic 7.8%
- Asian 1.2%


1	Walmart (SuperCenter)	1	\$38.10	46.35%
2	Food Lion	2	\$20.80	25.30%
3	Royal Farm Stores	3	\$8.10	9.85%
4	Walgreens	1	\$5.50	6.69%
5	Save A Lot	1	\$4.80	5.84%
6	7-Eleven	1	\$2.20	2.68%
7	Fas-Marts	1	\$2.00	2.43%
		10	\$81.50	99.15%



CARROLL COUNTY (\$663.1 million)
(Includes Eldersburg, Manchester, Taneytown, Westminster)

- Population 168,447
- # of Households 60,758
- Median Income \$96,769
- Under 18 21.6%
- Over 65 17.3%
- Female 50.5%
- White 88.3%
- Black 3.9%
- Hispanic 3.9%
- Asian 2.1%

1	Walmart (SuperCenter)	4	\$107.20	16.17%
2	Weis Markets	5	\$95.16	14.35%
3	Albertsons (Safeway)	3	\$93.72	14.13%
4	The Giant Company (Martin's)	1	\$72.79	10.98%
5	Food Lion	3	\$43.50	6.56%
6	BJ's Wholesale Club	1	\$41.50	6.26%
7	Giant Food	1	\$39.16	5.91%
8	CVS	6	\$30.40	4.58%
9	Shoppers	1	\$21.10	3.18%
10	Walgreens	4	\$18.90	2.85%
11	High's/Baltimore	8	\$13.80	2.08%
12	Target	1	\$13.10	1.98%

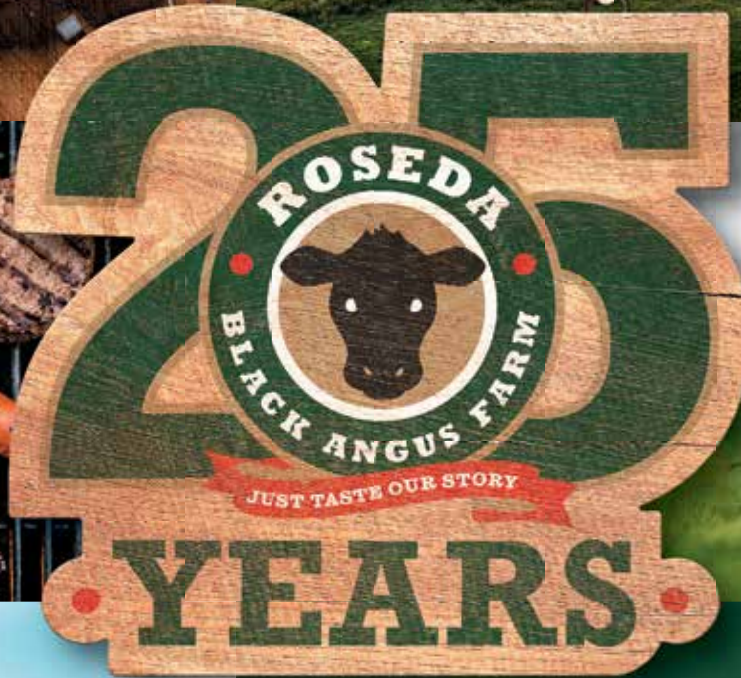


CALVERT COUNTY (\$387.3 million)
(Includes Dunkirk, Prince Frederick, Solomons)

- Population 92,525
- # of Households 31,973
- Median Income \$109,313
- Under 18 23.0%
- Over 65 15.5%
- Female 50.4%
- White 77.5%
- Black 13.3%
- Hispanic 4.4%
- Asian 1.9%

1	Giant Food	3	\$146.78	37.90%
2	Albertsons (Safeway)	2	\$59.82	15.45%

See MARYLAND COUNTY SHARE on page 48



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MARYLAND COUNTY SHARE OF MARKET: 2021

Continued from page 46

13	7-Eleven	7	\$11.30	1.70%
14	Rite Aid	3	\$11.20	1.69%
15	IGA	1	\$10.92	1.65%
16	Sheetz	3	\$9.30	1.40%
17	Royal Farm Stores	3	\$9.10	1.37%
18	Wawa	2	\$8.66	1.31%
19	Aldi	1	\$8.60	1.30%
20	C&S Independents	1	\$1.79	0.27%
		59	\$661.20	99.71%

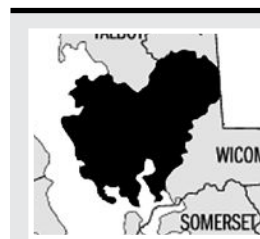
5	Food Lion	3	\$38.30	7.42%
6	BJ's Wholesale Club	1	\$37.40	7.24%
7	Sam's Club	1	\$33.70	6.53%
8	Target	2	\$26.50	5.13%
9	7-Eleven	10	\$21.80	4.22%
10	Dash-In	10	\$17.40	3.37%
11	Wawa	3	\$16.17	3.13%
12	Walgreens	3	\$15.10	2.92%
13	MOM's Organic Market	1	\$12.60	2.44%
14	Weis Markets	1	\$11.82	2.29%
15	Aldi	1	\$9.20	1.78%
16	Lidl	1	\$7.10	1.38%
17	McKay's Food & Drug	1	\$4.50	0.87%
18	C&S Independents	1	\$0.72	0.14%
		54	\$511.91	99.15%



CECIL COUNTY (\$279.3 million) (Includes Elkton, Northeast)

- Population 102,855
- # of Households 37,058
- Median Income \$76,887
- Under 18 22.5%
- Over 65 16.2%
- Female 50.5%
- White 84.6%
- Black 7.3%
- Hispanic 4.7%
- Asian 1.4%

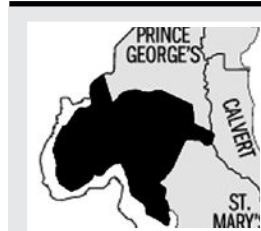
1	Walmart (SuperCenter)	2	\$56.80	20.34%
2	The Giant Company (Martin's)	1	\$56.22	20.13%
3	Food Lion	3	\$33.90	12.14%
4	Redner's Markets	1	\$25.20	9.02%
5	Albertsons (Acme)	1	\$22.16	7.93%
6	Wawa	3	\$22.02	7.88%
7	Royal Farm Stores	8	\$16.70	5.98%
8	Walgreens	3	\$12.70	4.55%
9	Aldi	1	\$8.20	2.94%
10	7-Eleven	4	\$6.90	2.47%
11	High's/Baltimore	4	\$5.40	1.93%
12	CVS	1	\$4.80	1.72%
13	Rite Aid	1	\$3.70	1.32%
14	Fas-Marts	1	\$1.90	0.68%
		34	\$276.60	99.03%



DORCHESTER COUNTY (\$56.7 million) (Includes Cambridge)

- Population 31,929
- # of Households 13,183
- Median Income \$52,917
- Under 18 21.0%
- Over 65 22.1%
- Female 52.5%
- White 62.3%
- Black 29.0%
- Hispanic 6.1%
- Asian 1.2%

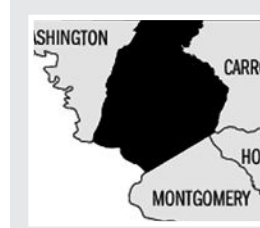
1	Walmart (SuperCenter)	1	\$25.20	44.44%
2	Food Lion	1	\$12.60	22.22%
3	Wawa	1	\$6.34	11.18%
4	Walgreens	1	\$5.20	9.17%
5	Rite Aid	1	\$4.00	7.05%
6	Royal Farm Stores	1	\$2.60	4.59%
		6	\$55.94	98.66%



CHARLES COUNTY (\$516.3 million) (Includes Bryan's Road, Waldorf)

- Population 163,257
- # of Households 56,520
- Median Income \$100,003
- Under 18 23.8%
- Over 65 12.9%
- Female 51.8%
- White 37.2%
- Black 50.1%
- Hispanic 6.3%
- Asian 3.4%

1	Albertsons (Safeway)	3	\$93.63	18.13%
2	Giant Food	2	\$86.47	16.75%
3	Walmart	2	\$40.30	7.81%
4	CVS	8	\$39.20	7.59%

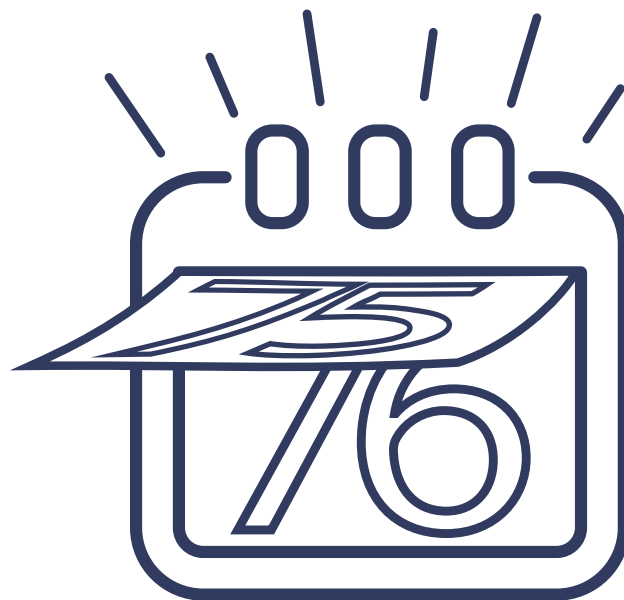


FREDERICK COUNTY (\$907.3 million) (Includes Brunswick, Emmitsburg, Frederick, Thurmont)

- Population 259,547
- # of Households 92,526
- Median Income \$97,730
- Under 18 23.1%
- Over 65 14.8%
- Female 50.7%
- White 71.7%
- Black 10.7%
- Hispanic 10.5%
- Asian 5.0%

1	Weis Markets	6	\$126.38	13.93%
2	Giant Food	3	\$117.78	12.98%
3	Walmart (SuperCenter)	2	\$103.70	11.43%
4	Food Lion	5	\$72.20	7.96%
5	Wegmans	1	\$70.80	7.80%
6	CVS	12	\$64.40	7.10%
7	Costco	1	\$51.10	5.63%
8	Giant Eagle	4	\$39.50	4.35%

See MARYLAND COUNTY SHARE on page 50



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MARYLAND COUNTY SHARE OF MARKET: 2021

Continued from page 48

9	Albertsons	2	\$33.93	3.74%
10	Sam's Club	1	\$31.00	3.42%
11	7-Eleven	14	\$25.70	2.83%
12	Walgreens	5	\$25.30	2.79%
13	Sheetz	7	\$24.10	2.66%
14	Aldi	2	\$22.50	2.48%
15	Target	1	\$14.80	1.63%
16	Wawa	3	\$13.72	1.51%
17	Royal Farm Stores	4	\$13.20	1.45%
18	International Markets	1	\$12.90	1.42%
19	MOM's Organic Market	1	\$12.50	1.38%
20	Military Commissaries	1	\$10.35	1.14%
21	C&S Independents	2	\$7.38	0.81%
22	High's/Baltimore	4	\$6.30	0.69%
23	Rutter's Farm Stores	1	\$2.30	0.25%
24	Circle K	1	\$2.10	0.23%
25	Dash-In	1	\$2.00	0.22%
		85	\$905.94	99.85%


19	Rite Aid	4	\$12.20	1.20%
20	High's/Baltimore	7	\$12.10	1.19%
21	Food Lion	2	\$10.40	1.02%
22	Lidl	1	\$8.60	0.84%
23	Save A Lot	1	\$5.80	0.57%
24	Sheetz	1	\$3.60	0.35%
25	C&S Independents	1	\$0.68	0.07%
		105	\$1,018.22	99.75%



HOWARD COUNTY (\$1.2 billion)
(Includes Columbia, Ellicott City, Laurel)

- Population 325,690
- # of Households 114,170
- Median Income \$121,160
- Under 18 24.2%
- Over 65 14.3%
- Female 51.1%
- White 50.3%
- Black 20.4%
- Hispanic 7.3%
- Asian 19.3%

1	Giant Food	7	\$281.30	23.94%
2	Harris Teeter	3	\$111.40	9.48%
3	Wegmans	1	\$101.60	8.65%
4	Albertsons (Safeway)	3	\$71.80	6.11%
5	Walmart (SuperCenter)	2	\$70.90	6.03%
6	Weis Markets	3	\$59.10	5.03%
7	International Markets	3	\$55.60	4.73%
8	Costco	1	\$54.90	4.67%
9	CVS	9	\$42.80	3.64%
10	Target	2	\$40.90	3.48%
11	Whole Foods	1	\$36.80	3.13%
12	BJ's Wholesale Club	1	\$33.60	2.86%
13	Trader Joe's	1	\$28.60	2.43%
14	Walgreens	5	\$26.60	2.26%
15	B. Green (Green Valley)	1	\$25.60	2.18%
16	Food Lion	2	\$22.30	1.90%
17	Sprouts	1	\$20.10	1.71%
18	7-Eleven	10	\$16.10	1.37%
19	Royal Farm Stores	6	\$14.50	1.23%
20	MOM's Organic Market	1	\$13.80	1.17%
21	Aldi	1	\$11.90	1.01%
22	Roots Markets	1	\$11.40	0.97%
23	High's/Baltimore	8	\$11.20	0.95%
24	Rite Aid	1	\$4.40	0.37%
25	Circle K	2	\$3.80	0.32%
26	Dash-In	1	\$2.10	0.18%
		77	\$1,173.10	99.82%



HARFORD COUNTY (\$1.0 billion)
(Includes Aberdeen, Bel Air, Havre de Grace)

- Population 255,441
- # of Households 93,955
- Median Income \$89,147
- Under 18 22.2%
- Over 65 16.6%
- Female 51.0%
- White 75.1%
- Black 14.8%
- Hispanic 4.8%
- Asian 3.1%

1	ShopRite (Klein's)	6	\$226.60	22.20%
2	Wegmans	1	\$90.60	8.88%
3	Walmart (SuperCenter)	3	\$89.10	8.73%
4	Giant Food	2	\$78.29	7.67%
5	Walgreens	11	\$54.00	5.29%
6	Wawa	9	\$50.55	4.95%
7	Target	3	\$49.70	4.87%
8	Weis Markets	2	\$44.71	4.38%
9	BJ's Wholesale Club	1	\$42.00	4.11%
10	Royal Farm Stores	15	\$37.60	3.68%
11	CVS	8	\$34.70	3.40%
12	Redner's Markets	2	\$33.70	3.30%
13	Albertsons (Safeway)	1	\$30.73	3.01%
14	7-Eleven	18	\$26.50	2.60%
15	Family Owned Markets	1	\$26.10	2.56%
16	Aldi	3	\$19.60	1.92%
17	Sprouts	1	\$16.90	1.66%
18	Military Commissaries	1	\$13.46	1.32%

See MARYLAND COUNTY SHARE on page 52



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MARYLAND COUNTY SHARE OF MARKET: 2021

Continued from page 50



KENT COUNTY (\$99.7 million) (Includes Chestertown, Worton)

• Population	20,195	• Female	51.9%
• # of Households	8,025	• White	77.8%
• Median Income	\$58,598	• Black	14.9%
• Under 18	15.4%	• Hispanic	4.5%
• Over 65	27.1%	• Asian	1.4%

1	Redner's Markets	1	\$25.10	25.18%
2	Walgreens	2	\$20.70	20.76%
3	Albertsons (Acme)	1	\$19.40	19.46%
4	Food Lion	1	\$15.60	15.65%
5	Royal Farm Stores	2	\$5.50	5.52%
6	C&S Independents	2	\$5.30	5.32%
7	7-Eleven	1	\$2.80	2.81%
8	Fas-Marts	1	\$1.90	1.91%
9	High's/Baltimore	1	\$1.90	1.91%
		12	\$98.20	98.50%



MONTGOMERY COUNTY (\$3.6 billion) (Includes Bethesda, Gaithersburg, Germantown, Rockville)

• Population	1,050,688	• Female	51.6%
• # of Households	370,950	• White	42.9%
• Median Income	\$108,820	• Black	20.1%
• Under 18	23.1%	• Hispanic	20.1%
• Over 65	16.1%	• Asian	15.6%

1	Giant Food	26	\$1,016.72	27.93%
2	Albertsons (Safeway/Balducci's)	19	\$482.97	13.27%
3	CVS	47	\$451.60	12.41%
4	International Markets	19	\$310.20	8.52%
5	Whole Foods	5	\$224.90	6.18%
6	Harris Teeter	7	\$182.70	5.02%
7	Costco	2	\$160.50	4.41%
8	7-Eleven	70	\$148.40	4.08%
9	Target	6	\$114.20	3.14%
10	Trader Joe's	4	\$114.20	3.14%
11	Wegmans	1	\$99.60	2.74%
12	Walgreens	13	\$72.30	1.99%
13	Aldi	6	\$49.70	1.37%
14	Sam's Club	1	\$42.30	1.16%
15	Walmart	1	\$35.30	0.97%
16	MOM's Organic Market	2	\$32.10	0.88%
17	Weis Markets	2	\$26.97	0.74%

18	Lidl	2	\$13.70	0.38%
19	Streets Market	1	\$12.90	0.35%
20	Food Lion	1	\$11.40	0.31%
21	Roots Markets	1	\$10.90	0.30%
22	Military Commissaries	1	\$10.14	0.28%
23	Fresh Market	1	\$8.90	0.24%
24	Kmart	1	\$6.30	0.17%
25	Circle K	1	\$2.30	0.06%
26	Dash-In	1	\$2.20	0.06%
27	C&S Independents	3	\$1.90	0.05%
		244	\$3,645.30	100.14%*



PRINCE GEORGE'S COUNTY (\$3.1billion) (Includes Bowie, Clinton, College Park, Hyattsville, Laurel, Oxon Hill)

• Population	909,327	• Female	51.9%
• # of Households	311,343	• White	12.3%
• Median Income	\$84,920	• Black	64.4%
• Under 18	22.1%	• Hispanic	19.5%
• Over 65	13.9%	• Asian	4.4%

1	Giant Food	17	\$595.69	19.31%
2	International Markets	22	\$341.30	11.06%
3	Shoppers	9	\$263.00	8.52%
4	CVS	48	\$257.50	8.35%
5	Albertsons (Safeway)	9	\$255.32	8.28%
6	Target	9	\$199.60	6.47%
7	Costco	3	\$163.80	5.31%
8	7-Eleven	81	\$151.30	4.90%
9	Wegmans	1	\$94.40	3.06%
10	Aldi	11	\$88.20	2.86%
11	BJ's Wholesale Club	2	\$79.10	2.56%
12	Walmart	4	\$78.40	2.54%
13	Walgreens	12	\$66.30	2.15%
14	Military Commissaries	1	\$45.32	1.47%
15	Food Lion	3	\$40.40	1.31%
16	Harris Teeter	2	\$39.80	1.29%
17	Lidl	5	\$39.50	1.28%
18	Weis Markets	3	\$38.57	1.25%
19	Whole Foods	1	\$32.70	1.06%
20	ShopRite (Price Rite)	2	\$30.10	0.98%
21	Royal Farm Stores	9	\$29.00	0.94%
22	MOM's Organic Market	2	\$27.50	0.89%
23	Wawa	4	\$24.77	0.80%
24	Save A Lot	4	\$18.40	0.60%
25	Dash-In	7	\$14.60	0.47%
26	Compare Foods	3	\$11.80	0.38%

See MARYLAND COUNTY SHARE on page 54

TAKING STOCK

from page 43

ed new sites in the market - Gaithersburg, MD, Fairfax, VA and two locations in Washington, DC - we have discovered that new Amazon Fresh stores will likely open in Chevy Chase, MD (Connecticut Avenue); Alexandria, VA; Arlington, VA; Bailey's Crossroads, VA; Falls Church, VA; Lorton, VA; Manassas, VA; Springfield, VA; and a third DC location near Dupont Circle (all DC stores will be considerably smaller than AF's 30,000 square foot prototype).

Moreover, the company reportedly plans to add stores in the Philadelphia and Metro New York markets. In addition to previously reported AF sites Bensalem, PA; Havertown, PA; Philadelphia, PA (5th & Spring Garden Streets); Warrington PA; Paramus, NJ; and Woodland Park, NJ, new stores are likely to open in Ardmore, PA; Broomall, PA; Doylestown, PA; Exton, PA; Lansdale, PA; Philadelphia (Market Street); Willow Grove, PA; Brookfield, CT; Bridgewater, NJ; East Brunswick, NJ; Eatontown, NJ; Hamilton Twp., NJ; Holmdel, NJ; Iselin, NJ; Lodi, NJ; Moorestown, NJ; Nutley, NJ; Old Bridge, NJ; Long Beach, NY; Oceanside, NY; and Plainview, NY.

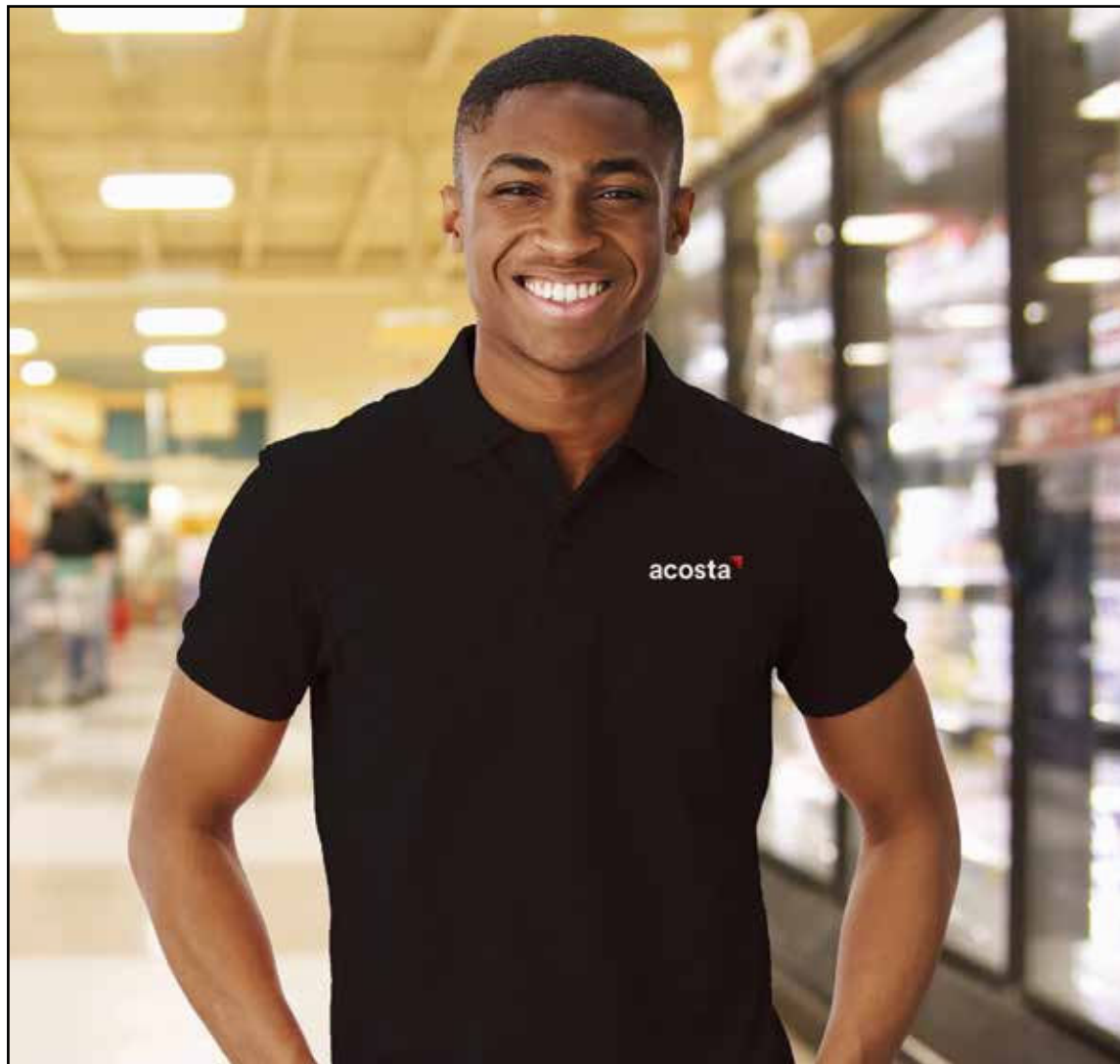
And you can bet there's even a longer list than that.

Will one Amazon Fresh store be a serious threat to other retailers in that market? Doubtful. But stringing together 100 AF stores in the DC-NY corridor would indeed have an impact. And when you add the firepower of other Amazon assets (Whole Foods and amazon.com) with the possibility of "Godzilla" acquiring several regional grocery chains in the next five years, Amazon becomes the number one issue that keeps other food retailers up at night.

'Round The Trade

And there's even more Amazon stuff to note: JP Morgan is reporting that "Godzilla" will surpass Walmart next year as the largest U.S. retailer. The "Behemoth's" 2020 revenue was \$559 billion last year; Amazon's 2020 sales were \$386 billion. JP Morgan's prediction itself isn't startling, but the projected rapidity of Amazon's growth caught me off guard. Previous reports by other analysts and research firms predicted that Amazon would become numero uno by 2024 or 2025. Now that Washington, DC attorney general Karl Racine has filed suit against the Seattle-based juggernaut for antitrust behavior claiming that that Amazon imposes onerous terms with its third-party sellers that ultimately drive up prices for online shoppers everywhere, expect other states to follow. Multiple published reports indicate that Pennsylvania, Massachusetts and Connecticut are considering similar action. Sales from Amazon approved third party sellers were \$80.5 billion last year (about 21 percent of total revenue). While Amazon's sales and earnings continue to skyrocket, there's clearly a darkening cloud that hovers above the company. Those dark clouds include intense scrutiny from Congress, from the Federal Trade Commission and from labor unions. Not surprisingly, Amazon disputes the relevancy and accuracy of Racine's suit, stating that, "The DC Attorney General has it exactly backwards - sellers set their own prices for the products they offer in our store. Amazon takes pride in the fact that we offer low prices across the broadest selection, and like any store we reserve the right not to highlight offers to our customers that are not priced competitively. The relief that the AG seeks would force Amazon to feature higher prices to customers, oddly going against core objectives of the antitrust law." These will be difficult and protracted battles facing Amazon...FMI - the Food Industry Association has released its annual "U.S. Grocery Shopper Trends" and one of the most interesting (but not surprising) trends is that the number of online shoppers has increased to 64 percent of all adults in the U.S. The report added that 29 percent of e-commerce consumers placing an order every week, or even more frequently. And the annual research paper indicates that more shoppers are utilizing mass merchants (Walmart and Target) as their primary online choice. Another emerging trend was that 58 percent of shoppers are now eating at home, certainly a byproduct of the pandemic. "Throughout the past year, American grocery consumers have developed a deeper relationship with their kitchens, increased their healthy eating consciousness, and have learned new ways to shop. We see shoppes engaging in more stock-up trips to support their at-home cooking, exercising new online shopping skills, and letting their personal concept of being well impact their food and shopping behaviors. Looking ahead, we expect many of these trends to continue," said Leslie Sarasin, FMI's CEO. I generally agree

TAKING STOCK continues on page 60



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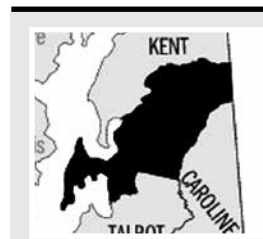
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MARYLAND COUNTY SHARE OF MARKET: 2021

Continued from page 52

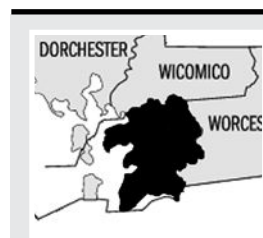
27	C&S Independents	5	\$10.00	0.32%
28	Circle K	1	\$2.00	0.06%
		280	\$3,038.37	98.48%



QUEEN ANNE'S COUNTY (\$136.8 million) (Includes Centreville, Chester, Stevensville)

• Population	50,381	• Female	50.4%
• # of Households	18,577	• White	86.3%
• Median Income	\$97,034	• Black	6.3%
• Under 18	21.4%	• Hispanic	4.3%
• Over 65	19.2%	• Asian	1.2%

1	Albertsons (Acme/Safeway)	2	\$61.20	44.74%
2	Food Lion	2	\$24.00	17.54%
3	Walgreens	2	\$12.10	8.85%
4	7-Eleven	4	\$8.80	6.43%
5	Royal Farm Stores	3	\$8.30	6.07%
6	CVS	1	\$5.60	4.09%
7	Wawa	1	\$4.88	3.57%
8	Fas-Marts	2	\$3.80	2.78%
9	Rite Aid	1	\$3.50	2.56%
10	Dash-In	1	\$2.20	1.61%
		19	\$134.38	98.23%



SOMERSET COUNTY (\$39.3 million) (Includes Crisfield)

• Population	25,616	• Female	45.9%
• # of Households	8,574	• White	51.4%
• Median Income	\$37,803	• Black	41.5%
• Under 18	16.9%	• Hispanic	4.0%
• Over 65	17.3%	• Asian	1.0%

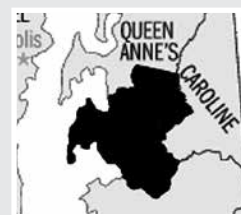
1	Food Lion	2	\$25.90	65.90%
2	Rite Aid	1	\$3.10	7.89%
3	Royal Farm Stores	1	\$2.60	6.62%
4	Dash-In	1	\$2.30	5.85%
5	Fas-Marts	1	\$2.00	5.09%
		6	\$35.90	91.35%



ST. MARY'S COUNTY (\$396.7 million) (Includes Charlotte Hall, Leonardtown, Lexington Park)

• Population	113,510	• Female	50.0%
• # of Households	40,552	• White	73.5%
• Median Income	\$89,845	• Black	14.9%
• Under 18	23.9%	• Hispanic	5.6%
• Over 65	13.4%	• Asian	2.9%

1	McKay's Food & Drug	4	\$60.10	15.15%
2	Walmart (SuperCenter)	1	\$53.90	13.59%
3	BJ's Wholesale Club	1	\$38.00	9.58%
4	Giant Food	1	\$37.45	9.44%
5	Weis Markets	2	\$34.31	8.65%
6	Food Lion	2	\$29.50	7.44%
7	Wawa	4	\$26.80	6.76%
8	Harris Teeter	1	\$25.80	6.50%
9	CVS	5	\$19.10	4.81%
10	Military Commissaries	1	\$18.61	4.69%
11	Walgreens	3	\$14.50	3.66%
12	Target	1	\$14.40	3.63%
13	Aldi	1	\$7.50	1.89%
14	Sheetz	2	\$6.40	1.61%
15	7-Eleven	2	\$4.40	1.11%
16	Dash-In	2	\$3.80	0.96%
17	C&S Independents	1	\$0.12	0.03%
		34	\$394.69	99.49%



TALBOT COUNTY (\$217.1 million) (Includes Easton, St. Michael's)

• Population	37,181	• Female	52.7%
• # of Households	16,826	• White	77.4%
• Median Income	\$73,547	• Black	12.8%
• Under 18	18.2%	• Hispanic	7.2%
• Over 65	29.7%	• Asian	1.4%

1	Giant Food	1	\$36.96	17.02%
2	BJ's Wholesale Club	1	\$35.20	16.21%
3	Harris Teeter	1	\$26.10	12.02%
4	Walmart (SuperCenter)	1	\$20.90	9.63%
5	Albertsons (Acme)	1	\$19.41	8.94%
6	Target	1	\$16.10	7.42%
7	Weis Markets	1	\$10.89	5.02%
8	Graul's	1	\$9.90	4.56%
9	Aldi	1	\$7.90	3.64%
10	CVS	2	\$7.40	3.41%
11	Wawa	1	\$5.56	2.56%
12	Walgreens	1	\$4.80	2.21%
13	High's/Baltimore	2	\$3.80	1.75%

See MARYLAND COUNTY SHARE on page 56



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MARYLAND COUNTY SHARE OF MARKET: 2021

Continued from page 54


14	Royal Farm Stores	1	\$3.00	1.38%
15	Rite Aid	1	\$2.90	1.34%
16	7-Eleven	1	\$2.10	0.97%
17	Fas-Marts	1	\$2.10	0.97%
		19	\$215.02	99.04%

7	Target	1	\$13.90	4.97%
8	Aldi	1	\$10.60	3.79%
9	Walgreens	2	\$10.20	3.65%
10	Wawa	2	\$9.85	3.53%
11	CVS	2	\$6.90	2.47%
12	Save A Lot	1	\$4.70	1.68%
13	Fas-Marts	4	\$4.60	1.65%
14	7-Eleven	1	\$2.30	0.82%
15	Dash-In	1	\$2.20	0.79%
		34	\$276.95	99.12%



WASHINGTON COUNTY (\$520.6 million)
(Includes Fountainhead, Hagerstown, Hancock)

- Population 151,049
- # of Households 56,035
- Median Income \$60,860
- Under 18 21.7%
- Over 65 17.5%
- Female 49.1%
- White 77.4%
- Black 12.5%
- Hispanic 5.8%
- Asian 1.9%




WORCESTER COUNTY (\$230.7 million)
(Includes Ocean City, Pocomoke City, Snow Hill)

- Population 52,276
- # of Households 22,089
- Median Income \$63,499
- Under 18 17.0%
- Over 65 28.2%
- Female 51.5%
- White 80.0%
- Black 13.0%
- Hispanic 3.7%
- Asian 1.5%

1	The Giant Company (Martin's)	4	\$165.94	31.87%
2	Walmart (SuperCenter)	2	\$104.30	20.03%
3	Weis Markets	3	\$65.57	12.60%
4	Sam's Club	1	\$38.10	7.32%
5	Sheetz	8	\$30.20	5.80%
6	CVS	7	\$21.40	4.11%
7	Walgreens	4	\$20.20	3.88%
8	Aldi	2	\$16.30	3.13%
9	Target	1	\$13.50	2.59%
10	Save A Lot	2	\$12.80	2.46%
11	Food Lion	1	\$11.30	2.17%
12	C&S Independents	5	\$8.37	1.61%
13	7-Eleven	3	\$5.90	1.13%
14	High's/Baltimore	2	\$4.20	0.81%
		45	\$518.08	99.52%

1	Walmart (SuperCenter)	2	\$72.80	31.56%
2	Food Lion	4	\$60.50	26.22%
3	CVS	3	\$18.00	7.80%
4	Albertsons (Acme)	1	\$17.45	7.56%
5	Rite Aid	5	\$16.60	7.20%
6	7-Eleven	7	\$12.90	5.59%
7	Wawa	2	\$10.97	4.76%
8	Royal Farm Stores	3	\$8.70	3.77%
9	Walgreens	1	\$6.10	2.64%
10	C&S Independents	6	\$5.96	2.58%
11	Fas-Marts	1	\$2.10	0.91%
		35	\$232.08	100.6%*



WICOMICO COUNTY (\$279.4 million)
(Includes Fruitland, Salisbury)

- Population 103,609
- # of Households 37,793
- Median Income \$56,956
- Under 18 21.9%
- Over 65 16.3%
- Female 52.7%
- White 62.0%
- Black 27.3%
- Hispanic 5.5%
- Asian 3.0%

1	Walmart (SuperCenter)	2	\$70.80	25.34%
2	Food Lion	4	\$38.10	13.64%
3	Albertsons (Acme)	1	\$36.30	12.99%
4	Sam's Club	1	\$35.80	12.81%
5	Royal Farm Stores	7	\$15.80	5.65%
6	Rite Aid	4	\$14.90	5.33%

() 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 2021

DIRECTORY OF RETAILERS

From page 14

Food World Stores: 3
Food World Vol.: \$34.4 million

Giant Eagle

101 Kappa Dr.
RIDC Park
Pittsburgh, PA 15238
Phone: (412) 963-6200
Web: gianteagle.com
CEO: Laura Karet
Primary Supplier: Direct
Food World Stores: 4 (includes Get Go)
Food World Vol.: \$39.5 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-Ops.: Irfan Badabinga
SVP-Merch.: Tonya Herring
VP-Mktg.: Dyani Hanrahan
VP-Finance: Tony Matala
VP-HR: Robin Anderson
VP-Cat. Mgmt.-Fresh Foods: Richard Manzi
VP-Cat. Mgmt.-Non-Perishable: Diane

Couchman
Dir.-Fresh Field Merch.: Cindy Volk
Dir.-Pharmacy: Paul Zvaleny
Dir.-Deli/Bakery: David Grove
Dir.-Produce/Floral: Rob Nickels
Dir.-Meat/Seafood: Bill Campbell
Dir.-Non-Perish. Field Merch.: Gregory Bibbs
Dir.-Center Store Field Merch.: Cipriano Andrade
Dir.-Edible Groc./Dairy/Frozen: Monica Simmons-Dolce
Dir.-Nonfood: Daniel Wigginton
Dir.-Merch. Planning: Frank Gallagher
Dir.-Pricing & Promotion: Erik Weenink
Dir.-Brands & Media: Kate Kowalzik
Dir.-Ext. Comms. & Comm Rels.: Felis Andrade
Dir.-Mktg. Planning & Ops.: Kurt Guinther
Dir.-Digital Loyalty & CSM: Ryan Draude
Dir.-Healthy Living: Lisa Coleman
Sales Mgrs.: Paul Maskavich, Lisa Richardson, Patrick Starliper, Josh Hard-
ester, Illham Tarbouz, Joe Adams, Scott
Belcher, Ilana Fulayter, Steve Grassi
Primary Supplier: Direct
Food World Stores: 159
Food World Vol.: \$6.1 billion

The Giant Company

Div. of Ahold Delhaize USA
P.O. Box 249

1149 Harrisburg Pike
Carlisle, PA17013
Phone: (717) 249-4000
Web: giantfoodstores.com
Pres.: Nicholas Bertram
SVP-Customer Experience: Glennis Harris
CMO/SVP-Omnichannel Merch.: John Ruane
VP-Fresh Merch.: Dave Lessard
VP-Center Store Merch.: Rebecca Lupfer
Div. VP-Mid-Atlantic: Sepi Burkett
Div. VP-Greater Phil.: Manuel Haro
VP-Team Experience: Matt Lutcavage
VP-Brand Experience: Matt Simon
VP-Finance: Julia Morales
Primary Distributor: C&S Wholesale Grocers/Direct
Food World Stores: 62 (includes Martin's)
Food World Vol.: \$2.75 billion

Graul's

12200 Tullamore Rd.
Timonium, MD 21093
Phone: (410) 308-2100
Web: graulsmarket.com
Officers/Buyers: Harold Graul Jr., Fred Graul, John Evans, Dennis Graul
Primary Supplier: UNFI
Food World Stores: 6
Food World Vol.: \$62.0 million

Great Valu Supermarkets

8258 Richfood Rd.
Mechanicsville, VA 23116
Phone: (804) 746-6000
Web: greatvalu.com
Primary Supplier: UNFI
Food World Stores: 13
Food World Vol.: \$115.1 million
**This is the advertising and marketing arm that serves a group of independents that operate in the Food World marketing area.*

Grocery Outlet

5650 Hollis St.
Emeryville, CA 94608
Phone: (510) 845-1999
Web: groceryoutlet.com
Vice Chmn.: MacGregor Read
CEO: Eric Lundberg
Pres.: RJ Sheedy
Primary Supplier: Direct
Food World Stores: 10
Food World Vol.: \$64.1 million

Harris Teeter

Div. of Kroger
701 Crestdale Rd.
Matthews, NC 28105

See **DIRECTORY** on page 62

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450 High Street
Lancaster, PA 17603
Ph: 717-299-2406
Email: dorisgarcia@bellsalesandmarketing.net

Baltimore Office:

927 Whispering Ridge Ln.
Bel Air, MD 21015
Ph: 410-969-8000
Fx: 410-969-8100
Email: paulbell@bellsalesandmarketing.net

IN REVIEW: WEGMANS

State	County	2021 Stores	2021 Sales (in millions)	2021 County Food Sales	% of 2021 County Market	2020 Stores	2020 Sales (in millions)	% of 2020 County Market
MD	Anne Arundel	1	\$88.20	\$2,275.40	3.88%	1	\$81.50	4.00%
MD	Baltimore County	2	\$161.70	\$3,273.90	4.94%	2	\$152.70	5.21%
MD	Frederick	1	\$70.80	\$907.30	7.80%	1	\$66.00	7.97%
MD	Harford	1	\$90.60	\$1,020.80	8.88%	1	\$83.90	9.03%
MD	Howard	1	\$101.60	\$1,175.20	8.65%	1	\$95.10	8.72%
MD	Montgomery	1	\$99.60	\$3,640.10	2.74%	1	\$90.20	2.64%
MD	Prince Georges	1	\$94.40	\$3,085.20	3.06%	1	\$87.30	3.08%

MD Recap: 8 stores with sales of \$706.9 million. Total retail food sales for MD in the study: \$20.8 billion. Wegmans share of MD is 3.4%.

PA	Cumberland	1	\$59.20	\$1,138.40	5.20%	1	\$55.70	5.53%
PA	Lancaster	1	\$65.20	\$1,740.00	3.75%	1	\$59.30	3.81%

PA Recap: 2 stores with sales of \$124.4 million. Total retail food sales for PA in the study: \$6.65 billion. Wegmans share of PA is 1.87%.

VA	Albemarle	1	\$71.40	\$641.70	11.13%	1	\$64.20	11.07%
VA	Chesterfield	1	\$63.20	\$1,443.60	4.38%	1	\$58.30	4.48%
VA	Fairfax	4	\$406.80	\$5,331.40	7.63%	3	\$309.70	6.39%
VA	Henrico	1	\$65.40	\$1,905.30	3.43%	1	\$61.40	3.49%
VA	Loudoun	2	\$182.80	\$1,472.40	12.42%	2	\$168.40	12.21%
VA	Prince William	2	\$209.30	\$1,856.40	11.27%	2	\$190.70	11.30%
VA	Spotsylvania	1	\$71.20	\$767.80	9.27%	1	\$65.80	9.48%
VA	Virginia Beach	1	\$68.40	\$1,654.60	4.13%	1	\$63.50	4.24%

VA Recap: 13 stores with sales of \$1.14 billion. Total retail food sales for VA in the study: \$23.56 billion. Wegmans share of VA is 4.84%.

Mid-Atlantic Recap: 23 stores with sales of \$1.97 billion annually. Mid-Atlantic retail food sales total: \$54.9 billion.

Wegmans Per Store Average: \$85.64 million

Source: *Food World*, June 2021

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TAKING STOCK

from page 53

but look for the “eating at home” number to drop closer to the 50 percent mark...embarrassing leak of the month: according to *The Financial Times*, which got hold of an internal Nestle report/presentation, the world's largest food manufacturer admitted that more than 60 percent of its food and drink offerings do not meet the recognized definition of health and that some of its items will never be healthy no matter how much re-engineering is performed. Personally, that means an abrupt end to my Nerds addiction; I'm switching to Fruity Water...from Ahold Delhaize USA we learned that late last month its distribution center complex in Mauldin, SC (which it acquired from Southeastern Grocers last year) began receiving product at its dairy, meat, and produce and its frozen facilities. Shipping will begin on July 15. ADUSA is hoping to integrate 23 warehouses into a fully functioning self-supply distribution and logistics network by 2023.

Local Notes

A tip of the hat to our friends at Eddie's of Roland Park. The two-store Baltimore-based retailer recently announced that it will undergo a multi-million renovation at its original store on Roland Avenue in the city. The renovation of Eddie's other store on North Charles Street, a former Acme Market, was completed in 2016 and the upgrade has proven remarkably successful. This time, the remodel will take place in a smaller footprint - 8,500 square feet - and the store will remain open during the remodeling process. “This is incredibly exciting for us,” said Eddie's VP Michael Schaffer, the third-generation co-owner who is helping steer the project. “It has literally been years in the planning, and my family is grateful to the longtime shoppers and devoted fans who have been cheering on this process with great anticipation.” Construction is set to begin as early as this month and is expected to last up to 15 months - including a pause during the busy holiday shopping season. Initial phase work will include the store's basement and façade—including an expansive, steel cantilevered canopy erected front and center above the main entrance, which will provide protection from the weather, a shaded place for seating, and a location for outdoor events. “This store was destined to be a place for gathering,” stated Nancy Cohen, Eddie's president/co-owner and daughter of the late Victor Cohen, who founded the store. “My father always felt that the key to a successful business was treating your customers like family, making them feel at home. This store is rich with history, and we hope to share some of that story through the interiors, while introducing many new elements to heighten the Eddie's shopping experience.” The new design will include more windows, inviting natural light into the retail space, as well as LED illumination, improved circulation, and new, energy-efficient refrigeration and freezer cases throughout the store. The shopping experience will also feel more open, thanks to an exposed wood ceiling, wider aisles, improved flow and wayfinding—along with nearly 1,000 additional square feet of retail space including all-new shelving, fixtures and categorization. Full-service departments such as deli, bakery, cheese, coffee and gourmet-to-go will receive a complete upgrade and outfitted with new equipment and modernized signage. In produce, shoppers will enjoy a significantly expanded salad bar, a centralized wine and spirits department, and—similar to its North Charles Street location—Eddie's signature catering service will move to near the checkout, making it more convenient for customers to order. Cohen, one of the best independent retailers in the country, also summarized some of the challenges of operating during the pandemic. “The year was not without its difficulties,” admitted Cohen. “But we have a wonderful staff that really pulled together. Between our employees' dedication, the loyalty of our community and vendors, and now this amazing project finally getting underway—there is a lot to be optimistic about and thankful for.”...Sheetz, a stellar performer in the c-store arena, later this summer will become the first convenience store retailer to accept bitcoins at all locations. The Altoona, PA based family-owned chain, with 622 c-stores in PA, MD, VA, WV, OH and NC, will work with digital payment network Flexa and its point-of-sale tech partner NCR. “Above all else, our mission at Sheetz is to continue providing our customers with the ultimate one-stop-shop where they can refuel their car and refresh their body. As a result, we are constantly innovating and exploring new offerings to truly give

TAKING STOCK continues on page 100

IN REVIEW: TARGET

State	County	2021 Stores	2021 Sales (in millions)	2021 County Food Sales	% of 2021 County Market	2020 Stores	2020 Sales (in millions)	% of 2020 County Market
DC	Washington	5	\$87.20	\$2,414.60	3.61%	5	\$76.20	3.47%
DC Recap: 5 stores with sales of \$87.2 million. Total retail food sales for DC in the study: \$2.41 billion. Target share of DC is 3.61%.								
DE	Kent	1	\$16.40	\$515.80	3.18%	1	\$13.90	2.98%
DE Recap: 1 store with sales of \$16.4 million. Total retail food sales for DE in the study: \$1.48 billion. Target share of DE is 1.11%.								
MD	Anne Arundel	5	\$95.20	\$2,275.40	4.18%	5	\$80.10	3.93%
MD	Baltimore City	1	\$20.60	\$1,520.20	1.36%	1	\$17.70	1.29%
MD	Baltimore County	6	\$96.50	\$3,273.90	2.95%	6	\$83.90	2.86%
MD	Carroll	1	\$13.10	\$663.10	1.98%	1	\$11.70	1.97%
MD	Charles	2	\$26.50	\$516.30	5.13%	2	\$23.40	5.20%
MD	Frederick	1	\$14.80	\$907.30	1.63%	1	\$11.90	1.44%
MD	Harford	3	\$49.70	\$1,020.80	4.87%	3	\$42.60	4.58%
MD	Howard	2	\$40.90	\$1,175.20	3.48%	2	\$35.20	3.23%
MD	Montgomery	6	\$114.20	\$3,640.10	3.14%	6	\$97.60	2.86%
MD	Prince George's	9	\$199.60	\$3,085.20	6.47%	9	\$169.70	5.98%
MD	St. Mary's	1	\$14.40	\$396.70	3.63%	1	\$13.60	3.86%
MD	Talbot	1	\$16.10	\$217.10	7.42%	1	\$15.30	7.80%
MD	Washington	1	\$13.50	\$520.60	2.59%	1	\$12.20	2.65%
MD	Wicomico	1	\$13.90	\$279.40	4.97%	1	\$12.50	4.75%
MD Recap: 40 stores with sales of \$729.0 million. Total retail food sales for MD in the study: \$20.8 billion. Target share of MD is 3.5%.								
PA	Cumberland	2	\$32.30	\$1,138.40	2.84%	2	\$28.20	2.80%
PA	Dauphin	2	\$26.90	\$1,022.10	2.63%	2	\$24.50	2.64%
PA	Franklin	1	\$16.20	\$459.90	3.52%	1	\$14.70	3.56%
PA	Lancaster	3	\$54.10	\$1,740.00	3.11%	3	\$46.10	2.96%
PA	York	3	\$54.80	\$1,569.30	3.49%	3	\$46.80	3.29%
PA Recap: 11 stores with sales of \$184. million. Total retail food sales for PA in the study: \$6.65 billion. Target share of PA is 2.77%.								
VA	Albemarle	1	\$14.20	\$641.70	2.21%	1	\$12.50	2.16%
VA	Arlington	2	\$42.30	\$949.80	4.45%	1	\$19.80	2.34%
VA	Chesapeake City	3	\$29.50	\$883.10	3.34%	3	\$26.70	3.25%
VA	Chesterfield	5	\$60.70	\$1,443.60	4.20%	5	\$56.90	4.38%
VA	Culpeper	1	\$14.00	\$164.80	8.50%	1	\$13.10	9.32%
VA	Fairfax	11	\$226.30	\$5,331.40	4.24%	11	\$193.20	3.98%
VA	Frederick	2	\$25.60	\$496.30	5.16%	2	\$24.00	5.25%
VA	Hampton/Newport News	2	\$25.90	\$1,121.80	2.31%	2	\$24.20	2.31%
VA	Hanover	1	\$15.70	\$460.90	3.41%	1	\$14.50	3.42%
VA	Henrico	6	\$92.20	\$1,905.30	4.84%	6	\$78.90	4.49%
VA	James City	2	\$23.10	\$409.60	5.64%	2	\$21.70	5.69%
VA	Loudoun	3	\$56.50	\$1,472.40	3.84%	3	\$48.80	3.54%
VA	Norfolk City	1	\$13.00	\$754.70	1.72%	1	\$12.10	1.68%
VA	Prince William (Super Target)	4	\$57.60	\$1,856.40	3.10%	4	\$53.70	3.18%
VA	Spotsylvania (Super Target)	2	\$30.40	\$767.80	3.96%	2	\$27.40	3.95%
VA	Stafford	2	\$33.90	\$428.40	7.91%	2	\$30.60	8.36%
VA	Virginia Beach	4	\$55.70	\$1,654.60	3.37%	4	\$48.40	3.23%
VA	Warren	1	\$15.60	\$146.80	10.63%	1	\$14.70	10.49%
VA Recap: 53 stores with sales of \$832.2 million. Total retail food sales for VA in the study: \$23.57 billion. Target share of VA is 3.54%.								

Mid-Atlantic Recap: 110 stores with sales of \$1.85 billion annually. Mid-Atlantic retail food sales total: \$54.9 billion. Target Per Store Average: \$16.81 million

Source: Food World, June 2021

DIRECTORY OF RETAILERS

From page 57

Phone: (704) 845-3100
Web: harristeeter.com
Pres.: Rod Antolock
Primary Supplier: Direct
Food World Stores: 78
Food World Vol.: \$2.36 billion

IGA

275 Schoolhouse Rd.
Cheshire, CT 06410
Phone: (203) 272-3511
Fax: (202) 250-2953
Primary Supplier: Bozzuto's
Food World Stores: 7
Food World Vol.: \$61.52 million
**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.*

Karns Quality Food Ltd.

675 Silver Spring Rd.
Mechanicsburg, PA 17050
Phone: (717) 766-6477
Web: karnsfoods.com
CEO/Pres.: D. Scott Karns
Primary Supplier: UNFI
Food World Stores: 9
Food World Vol.: \$171.0 million

Kroger

Mid-Atlantic Div.
3631 Peters Creek Rd. NW
Roanoke, VA 24019
Phone: (540) 563-3500
Web: kroger.com
CEO: Rodney McMullen
Pres.-Mid-Atlantic Div.: Paula Ginnett
Primary Supplier: Direct
Food World Stores: 38 (Includes Market-place)
Food World Vol.: \$1.28 billion

Lidl U.S.

3500 S. Clark St.
Arlington, VA 22202
Phone: (571) 398-5435
Chmn: Christian Hartnagel
Pres./CEO Lidl US: Michal Lagunioneck
VP-U.S.: Pavel Petkov
Dir.-U.S. Sales: Jean Christophe Chartier
Primary Supplier: Direct
Food World Stores: 46
Food World Vol.: \$360.3 million

McKay's Food & Drug

43251 Rescue Ln.
Hollywood, MD 20636
Phone: (301) 373-5848
Web: shopmckays.com

Pres./CEO: David McKay
Buyer: David McKay
Primary Supplier: MDI
Food World Stores: 5
Food World Vol.: \$64.6 million

MOM's Organic Market

5566 Randolph Rd
Rockville, MD 20852
Phone: (301) 816-4944
Web: momsorganicmarket.com
CEO: Scott Nash
Primary Supplier: UNFI
Food World Stores: 16
Food World Vol.: \$230.9 million

Publix

3300 Publix Corporate Pkwy.
Lakeland, FL 33811
Phone: (863) 688-7407
Pres./CEO: Todd Jones
Charlotte, NC Div.:
4135 S. Stream Blvd., Ste. 500
Charlotte, NC 28217
Phone: (704) 424-5017
Div. VP: Chuck Roskovich
Web: publix.com
Primary Supplier: Direct
Food World Stores: 19
Food World Vol.: \$286.0 million

Redner's Markets Inc.

3 Quarry Rd.
Reading, PA 19605
Phone: (610) 926-3700
Web: rednersmarkets.com
Chairman: Richard Redner
Pres/CEO: Ryan Redner
COO: Gary M. Redner
VP-Procurement: Dan Eberhart
VP/General Counsel: Jason Hopp
VP-Finance: Richard Rabenold
VP-Groc. Ops.: William Wallace
VP-Perishables: Gary O'Brien
VP-HR: Robert McDonough
VP-IT: Nicholas Hidalgo
Primary Supplier: UNFI
Food World Stores: 13
Food World Vol.: \$280.1 million

Roots Market

5808 Clarksville Square Rd.
Clarksville, MD 21029
Phone: (443) 535-9321
Web: rootsmkt.com
Owner: Jeff Kaufman
Food World Stores: 2
Food World Vol.: \$22.3 million

See **DIRECTORY** on page 66

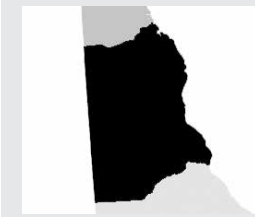


BelGioioso Cheese thanks the dedicated retailers and their teams (in the field and at store level) for their conscientious and dedicated service to all our consumers during this stressful time. Keeping shelves stocked with product to accommodate consumer demands is greatly appreciated.



DELAWARE COUNTY SHARE OF MARKET: 2021

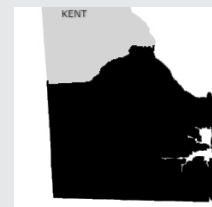
Total sales for those Delaware counties included in the study are \$1.48 billion



KENT COUNTY (\$515.8 million) (Includes Dover, Harrington, Smyrna)

• Population	180,786	• Female	51.8%
• # of Households	65,796	• White	60.4%
• Median Income	\$60,910	• Black	27.3%
• Under 18	22.8%	• Hispanic	7.4%
• Over 65	17.5%	• Asian	2.4%

Rank	Company	Stores	Sales (in millions)	% of Market
1	Redner's Markets	3	\$72.10	13.98%
2	Walmart (SuperCenter)	2	\$59.20	11.48%
3	Wawa	7	\$55.47	10.75%
4	Albertsons (Acme/Safeway)	2	\$53.98	10.47%
5	Sam's Club	1	\$45.80	8.88%
6	Walgreens	8	\$35.30	6.84%
7	Food Lion	4	\$30.70	5.95%
8	Rite Aid	6	\$24.70	4.79%
9	Aldi	3	\$23.80	4.61%
10	Fas-Marts	14	\$20.30	3.94%
11	Military Commissaries	1	\$17.34	3.36%
12	CVS	3	\$16.50	3.20%
13	Target	1	\$16.40	3.18%
14	Royal Farm Stores	8	\$16.30	3.16%
15	International Markets	1	\$10.10	1.96%
16	Lidl	1	\$6.80	1.32%
17	C&S Independents	2	\$2.80	0.54%
18	7-Eleven	1	\$2.60	0.50%
		68	\$510.19	98.91%



SUSSEX COUNTY (\$966.3 million) (Includes Bethany Beach, Millville, Seaford)

• Population	234,225	• Female	51.6%
• # of Households	91,697	• White	75.4%
• Median Income	\$63,162	• Black	12.2%
• Under 18	18.3%	• Hispanic	9.3%
• Over 65	28.7%	• Asian	1.4%

1	Giant Food	3	\$172.66	17.87%
2	Food Lion	9	\$138.70	14.35%
3	Walmart (SuperCenter)	4	\$128.40	13.29%
4	Walgreens	14	\$74.10	7.67%
5	Albertsons (Acme/Safeway)	2	\$62.52	6.47%
6	Weis Markets	4	\$59.90	6.20%
7	Wawa	8	\$54.34	5.62%
8	Redner's Markets	2	\$50.30	5.21%
9	Royal Farm Stores	20	\$43.60	4.51%
10	BJ's Wholesale Club	1	\$40.20	4.16%
11	Harris Teeter	2	\$39.70	4.11%
12	C&S Independents	3	\$38.24	3.96%
13	CVS	6	\$32.00	3.31%
14	Rite Aid	10	\$30.30	3.14%
15	Fas-Marts	10	\$13.90	1.44%
16	Fresh Market	1	\$12.90	1.33%
17	Save A Lot	2	\$11.20	1.16%
18	International Markets	1	\$9.10	0.94%
		102	\$1,012.06	104.74%*

() 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 2021

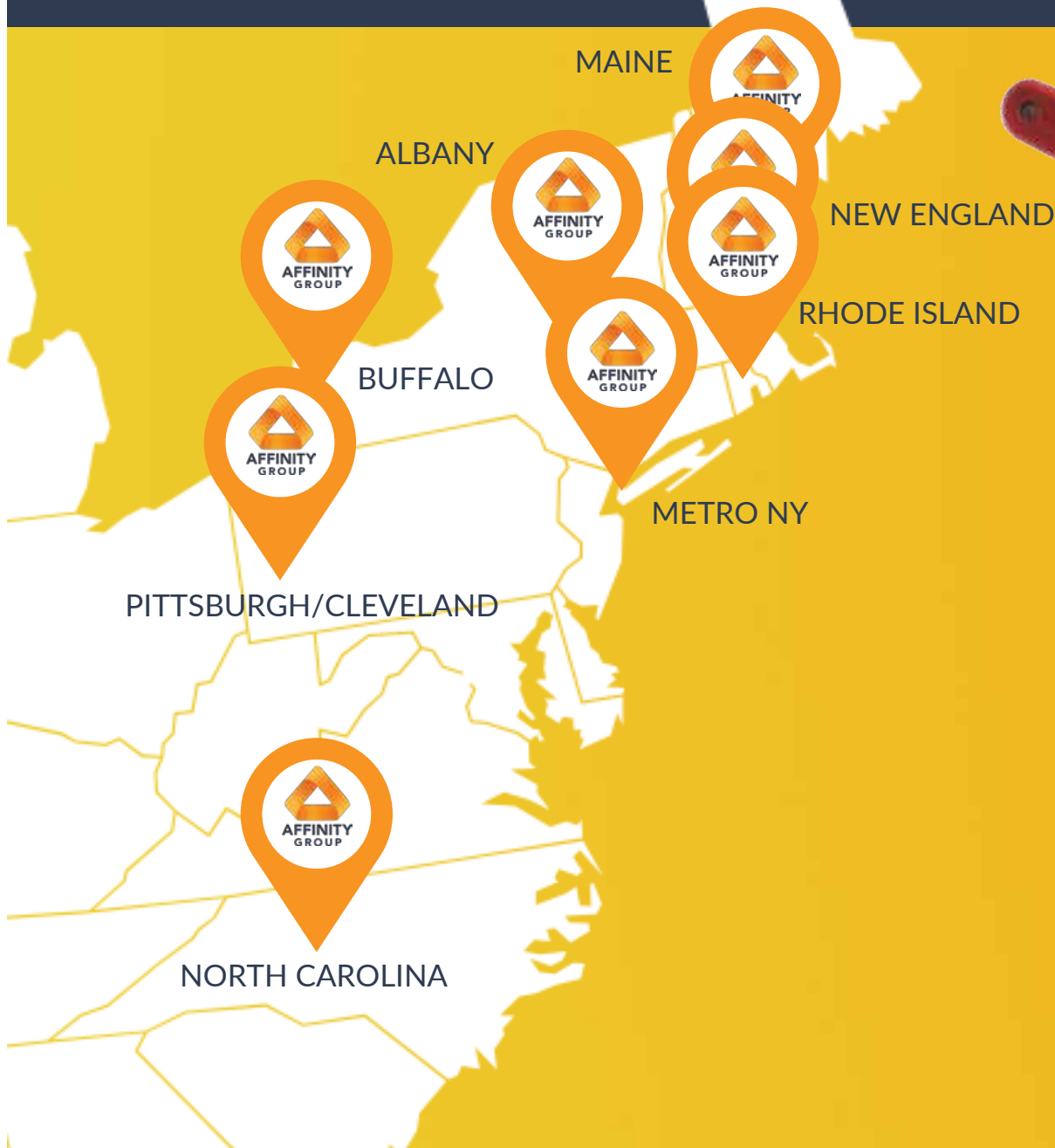


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DIRECTORY OF RETAILERS

From page 62

Save A Lot

400 Northwest Plaza Dr.
St. Ann, MO 63074
Phone: (314) 592-9100
Web: save-a-lot.com
CEO: Kenneth McGrath
Supplier: Direct
Food World Stores: 36
Food World Vol.: \$224.8 million

Sharp Shopper

1110 Sharp Ave.
Ephrata, PA 17522
Phone: (717) 733-9555
Web: sharpshopper.net
Owners: Dennis & Bonnie Sharp
Primary Supplier: Direct
Food World Stores: 4
Food World Vol.: \$50.5 million

Shoppers Food & Pharmacy

Div. of UNFI
16901 Melford Blvd., Ste. 300
Bowie, MD 20715
Phone: (301) 306-8600
Web: shoppersfood.com
CEO: Steve Spinner
Primary Supplier: UNFI
Food World Stores: 23
Food World Vol.: \$653.4 million

ShopRite

5000 Riverside Dr.
Keasby, NJ 08832
Phone: (908) 527-3300
Web: shoprite.com
Chmn./CEO: Joseph Colalillo
Pres./COO: Joseph Sheridan
Food World Stores: 16 (includes Price Rite)
Food World Vol.: \$443.1 million
**This is the retail arm of wholesaler grocery co-op Wakefern Food Corp. All of the ShopRite stores are independently owned. All of the Price Rite stores are corporately owned.*

Sprouts

5455 E. High St., Ste. 111
Phoenix, AZ 85054
Phone: (480) 814-8016
Web: sprouts.com
CEO: Jack Sinclair
Chief Operations Officer: Dan Sanders
SVP/CMO: Gillian Phillips
SVP-East: Dan Croce
Primary Supplier: Direct
Food World Stores: 6
Food World Vol.: \$110.1 million

Streets Market & Café

2400 14th St. NW
Washington, DC 20009
Phone: (202) 265-3300
Web: streetsmarket.com
VP: Campbell Burns

Primary Supplier: UNFI
Food World Stores: 11
Food World Vol.: \$90.0 million

Trader Joe's

East Coast Div.
711 Atlantic Ave.
Boston, MA 02111
Phone: (857) 400-3400
Web: traderjoes.com
CEO: Dan Bane
Supplier: Direct
Food World Stores: 28
Food World Vol.: \$687.3 million

Tri-State Co-Op

506 E. Gibbsboro Rd.
Lindenwold, NJ 08021
Phone: (856) 783-2534
Pres.: Paul Buckley
Food World Stores: 1
Food World Vol.: \$14.48 million
**This is the marketing office for several smaller independent retailers operating in Maryland, Pennsylvania and New Jersey. They are supplied by UNFI.*

Wegmans Food Markets, Inc.

1500 Brooks Ave.
P.O. Box 30844
Rochester, NY 14603-0844
Phone: (585) 328-2550
Web: wegmans.com
Chmn: Danny Wegman
Pres./CEO: Colleen Wegman
Primary Supplier: Direct
Food World Stores: 23
Food World Vol.: \$1.97 billion

Weis Markets, Inc.

1000 S. 2nd St.
Sunbury, PA 17801
Phone: (570) 286-4571
Web: weismarkets.com
Chairman/Pres./CEO: Jonathan Weis
COO: Kurt Schertle
SVP/CFO/Treasurer: Michael Lockhard
SVP-Real Estate/Store Dev.: Rusty Graber
SVP-HR: Jim Marcil
SVP-Operations: David Gose
SVP-Merch./Marketing: Bob Gleeson
SVP/CIO: Greg Zeh
Primary Supplier: Direct
Food World Stores: 97
Food World Vol.: \$1.83 billion

Whole Foods Market

Div. of Amazon
Mid-Atlantic Div.
5515 Security Ln., Ste. 900
Rockville, MD 20852
Phone: (301) 984-4874
Web: wholefoodsmarket.com
Reg. Pres: Scott Allshouse
Northeast Div.
Harborside 3
210 Hudson St., Ste 700L.

Jersey City, NJ 07311
Phone: (201) 567-2090
Div. Pres.: Nicole Wescoe
Food World Stores: 32
Food World \$1.24 billion

DRUG STORES

CVS Caremark

One CVS Dr.
Woonsocket, RI 02895
Phone: (401) 765-1500
Web: cvs.com
CEO/Pres.: Karen Lynch
Pres.-CVS Pharmacy: Neela Montgomery
Food World Stores: 646
Food World Vol.: \$3.56 billion
**Includes both stand-alone stores and pharmacies within Target locations.*

Rite Aid

30 Hunter Ln.
Camp Hill, PA 17011
P.O. Box 3165
Harrisburg, PA 17105
Phone: (717) 761-2633
Web: riteaid.com
Chmn./CEO: Heyward Donigan
COO: Jim Peters
Food World Stores: 186
Food World Vol.: \$640.7 million

Walgreens

200 Wilmot Rd.
Deerfield, IL 60015
Phone: (847) 940-2500
Web: walgreens.com
CEO: Rosalind Brewer
Food World Stores: 327
Food World Vol.: \$1.77 billion

CONVENIENCE STORES

7-Eleven

3200 Hackberry Rd.
Irving, TX 75063
Phone: (972) 828-7011
Web: 7-eleven.com
Pres./CEO: Joseph DePinto
Primary Supplier: McLane
Food World Stores: 1,142
Food World Vol.: \$2.17 billion

Circle K Convenience Stores, Inc.

Div. of Couche-Tard
935 E. Tallamadge Ave.
Akron, OH 44310
Phone: (330) 630-6300
1100 Situs Court, Ste 100
Raleigh, NC 27606
Phone: (919) 774-6700
Web: circlek.com
Pres./CEO Brian P Hannasch
Food World Stores: 34
Food World Vol.: \$69.5 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
Food World Stores: 44
Food World Vol.: \$87.0 million

Fas Mart/Shore Shop Stores

Div. of GPM Investments
8565 Magellan Pkwy., Ste. 400
Richmond, VA 23227
Phone: (804) 730-1568
Web: fasmart.com
CEO: Arie Kotler
Primary Supplier: McLane
Food World Stores: 100
Food World Vol.: \$168.2 million

High's of Baltimore, LLC

Div. of Carroll Independent Fuel Co.
2700 Loch Raven Rd.
Baltimore, MD 21218
Phone: (410) 859-3636
Web: highsstores.com
Pres.: John Phelps
Primary Supplier: Liberty
Food World Stores: 54
Food World Vol.: \$95.1 million

Miller Marts

1000 E. City Hall Ave.
Norfolk, VA 23504
Phone: (757) 623-6600
Web: milleroil.com
Pres.: Jeff Miller
Primary Supplier: Davenport
Food World Stores: 15
Food World Vol.: \$28.6 million

Royal Farms

3611 Roland Ave.
Baltimore, MD 21211
Phone: (410) 889-0200
Web: royalfarms.com
Pres.: John Kemp
Primary Supplier: Cooper Booth
Food World Stores: 212
Food World Vol.: \$513.9 million

Rutter's

Div. of CHR Corp.
2295 Susquehanna Trail, Ste. C
York, PA 17404
Phone: (717) 848-9827
Web: rutters.com
Pres.: Scott Hartman
Primary Supplier: Core-Mark
Food World Stores: 68
Food World Vol.: \$129.8 million

Sheetz, Inc.

243 Sheetz Way
Claysburg, PA 16625
Phone: (800) 765-4686
Web: sheetz.com

See **DIRECTORY** on page 111

**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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IN REVIEW: FOOD LION

State	County	2021 Stores	2021 Sales (in millions)	2021 County Food Sales	% of 2021 County Market	2020 Stores	2020 Sales (in millions)	% of 2020 County Market
DE	Kent	4	\$30.70	\$515.80	5.95%	4	\$27.90	5.98%
DE	Sussex	9	\$138.70	\$966.30	14.35%	9	\$124.70	14.42%
DE Recap: 13 stores with sales of \$169.4 million. Total retail food sales for DE in the study: \$1.48 billion. Food Lion share of DE is 11.43%.								
MD	Anne Arundel	5	\$68.30	\$2,275.40	3.00%	5	\$60.30	2.96%
MD	Baltimore County	6	\$60.60	\$3,273.90	1.85%	6	\$53.80	1.84%
MD	Caroline	2	\$20.80	\$82.20	25.30%	2	\$17.80	23.36%
MD	Carroll	3	\$43.50	\$663.10	6.56%	3	\$37.40	6.28%
MD	Cecil	3	\$33.90	\$279.30	12.14%	3	\$29.10	11.57%
MD	Charles	3	\$38.30	\$516.30	7.42%	3	\$34.90	7.76%
MD	Dorchester	1	\$12.60	\$56.70	22.22%	1	\$10.90	18.38%
MD	Frederick	5	\$72.20	\$907.30	7.96%	5	\$62.40	7.54%
MD	Harford	2	\$10.40	\$1,020.80	1.02%	2	\$9.90	1.06%
MD	Howard	2	\$22.30	\$1,175.20	1.90%	2	\$19.70	1.81%
MD	Kent	1	\$15.60	\$99.70	15.65%	1	\$14.00	14.61%
MD	Montgomery	1	\$11.40	\$3,640.10	0.31%	1	\$10.10	0.30%
MD	Prince George's	3	\$40.40	\$3,085.20	1.31%	3	\$36.80	1.30%
MD	Queen Anne's	2	\$24.00	\$136.80	17.54%	2	\$20.90	16.00%
MD	Somerset	2	\$25.90	\$39.30	65.90%	2	\$23.30	59.90%
MD	St. Mary's	2	\$29.50	\$396.70	7.44%	2	\$25.90	7.35%
MD	Washington	1	\$11.30	\$520.60	2.17%	1	\$10.40	2.25%
MD	Wicomico	4	\$38.10	\$279.40	13.64%	4	\$34.70	13.17%
MD	Worcester	4	\$60.50	\$230.70	26.22%	4	\$56.80	27.09%
MD Recap: 52 stores with sales of \$639.6 million. Total retail food sales for MD in the study: \$20.8 billion. Food Lion share of MD is 3.07%.								
PA	Franklin	1	\$10.90	\$459.90	2.37%	1	\$10.00	2.42%
PA	York	1	\$4.80	\$1,569.30	0.31%	1	\$4.50	0.32%
PA Recap: 2 stores with sales of \$15.7 million. Total retail food sales for PA in the study: \$6.65 billion. Food Lion share of PA is 0.24%.								
VA	Accomack	2	\$32.70	\$96.90	33.75%	2	\$28.30	32.95%
VA	Albemarle	6	\$65.60	\$641.70	10.22%	6	\$57.60	9.94%
VA	Caroline	2	\$16.50	\$32.40	50.93%	2	\$15.60	52.17%
VA	Chesapeake City	12	\$146.20	\$883.10	16.56%	12	\$128.10	15.61%
VA	Chesterfield	17	\$209.20	\$1,443.60	14.49%	17	\$190.70	14.67%
VA	Dinwiddie	4	\$38.10	\$131.10	29.06%	4	\$34.50	28.00%
VA	Essex	1	\$11.20	\$61.80	18.12%	1	\$10.00	17.39%
VA	Fairfax	2	\$30.70	\$5,331.40	0.58%	2	\$28.90	0.60%
VA	Fauquier	3	\$23.10	\$176.90	13.06%	3	\$20.90	12.57%
VA	Gloucester	2	\$22.80	\$122.40	18.63%	2	\$20.10	17.80%
VA	Goochland	2	\$21.60	\$30.90	69.90%	2	\$19.30	72.56%
VA	Greene	1	\$9.40	\$23.00	40.87%	1	\$8.60	42.16%
VA	Hampton/Newport News	16	\$280.20	\$1,121.80	24.98%	16	\$244.70	23.31%
VA	Hanover	6	\$72.70	\$460.90	15.77%	6	\$64.20	15.13%
VA	Henrico	14	\$190.80	\$1,905.30	10.01%	14	\$170.10	9.68%
VA	Isle of Wight	3	\$35.30	\$89.30	39.53%	3	\$31.40	38.15%
VA	James City	5	\$59.80	\$409.60	14.60%	5	\$52.90	13.88%
VA	King George	2	\$26.10	\$90.80	28.74%	2	\$23.70	28.15%
VA	King William	2	\$30.30	\$37.40	81.02%	2	\$26.70	71.58%
VA	Lancaster	1	\$14.10	\$79.50	17.74%	1	\$12.80	16.04%
VA	Loudoun	3	\$38.40	\$1,472.40	2.61%	3	\$33.50	2.43%
VA	Louisa	2	\$21.80	\$48.10	45.32%	2	\$19.90	45.02%
VA	Madison	1	\$13.70	\$13.90	98.56%	1	\$12.10	90.98%
VA	Mathews	1	\$14.10	\$14.40	97.92%	1	\$12.40	87.32%
VA	Middlesex	1	\$14.00	\$32.40	43.21%	1	\$12.80	43.99%
VA	New Kent	3	\$34.90	\$51.80	67.37%	3	\$31.40	66.38%
VA	Norfolk City	8	\$132.40	\$754.70	17.54%	8	\$116.80	16.26%

IN REVIEW: FOOD LION

State	County	2021 Stores	2021 Sales (in millions)	2021 County Food Sales	% of 2021 County Market	2020 Stores	2020 Sales (in millions)	% of 2020 County Market
VA	Northampton	2	\$21.80	\$36.80	59.24%	2	\$19.40	57.40%
VA	Northumberland	1	\$13.90	\$20.50	67.80%	1	\$12.50	66.49%
VA	Orange	3	\$29.80	\$120.60	24.71%	3	\$25.90	23.72%
VA	Page	2	\$11.40	\$69.30	16.45%	2	\$10.20	15.74%
VA	Portsmouth City	5	\$72.70	\$273.50	26.58%	5	\$64.40	23.07%
VA	Powhatan	2	\$23.60	\$73.70	32.02%	2	\$20.80	30.63%
VA	Prince George	2	\$21.90	\$84.90	25.80%	2	\$19.40	25.23%
VA	Prince William	9	\$131.60	\$1,856.40	7.09%	9	\$114.70	6.79%
VA	Richmond	1	\$13.60	\$21.90	62.10%	1	\$12.10	59.61%
VA	Shenandoah	3	\$42.50	\$119.10	35.68%	3	\$37.00	34.01%
VA	Southampton	2	\$29.70	\$90.00	33.00%	2	\$25.90	30.98%
VA	Spotsylvania	1	\$12.10	\$767.80	1.58%	1	\$10.70	1.54%
VA	Suffolk City	5	\$50.80	\$303.80	16.72%	5	\$44.40	15.98%
VA	Virginia Beach	21	\$252.60	\$1,654.60	15.27%	21	\$220.60	14.72%
VA	Westmoreland	2	\$27.40	\$49.90	54.91%	2	\$23.50	52.11%
VA	York	4	\$48.80	\$179.80	27.14%	4	\$42.60	26.02%

VA Recap: 187 stores with sales of \$2.41 billion. Total retail food sales for VA in the study: \$23.57 billion. Food Lion share of VA is 10.25%.

Mid-Atlantic Recap: 254 stores with sales of \$3.23 billion annually. Mid-Atlantic retail food sales total: \$54.9 billion. Food Lion Per Store Average: \$12.73 million

Source: *Food World*, June 2021

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FOUND IN PRODUCE

Eastern Shore Supermarket Leaders:

Strong Comp Sales Help Food Lion Continue Dominance Among Supers In \$1.4B Delmarva Market

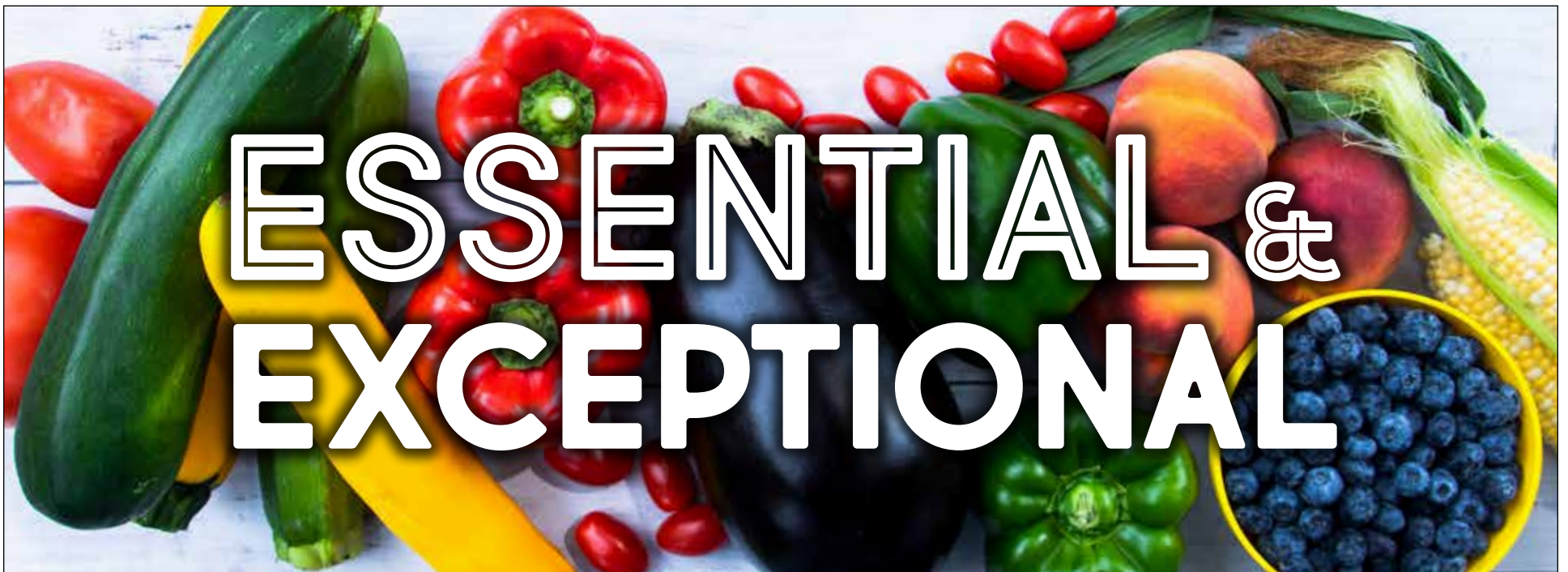
- Food Lion Remains Dominant
- Albertsons Grows Share
- Giant Still Per Store Avg. Leader
- Aldi Adds Another Unit
- HT Solid, To Add Kent Isl. Unit

Rank	Company	2021 Stores	2021 Sales (in millions)	% of 2021 Market	2020 Stores	2020 Sales (in millions)	% of 2020 Market
1	Food Lion	33	\$421.40	30.92%	33	\$378.70	31.76%
2	Albertsons (Acme/Safeway)	10	\$270.26	19.83%	10	\$228.57	19.17%
3	Giant Food	4	\$209.62	15.38%	5	\$178.14	14.94%
4	Redner's Markets	6	\$147.50	10.82%	6	\$130.10	10.91%
5	Weis Markets	5	\$70.79	5.19%	5	\$58.20	4.88%
6	Harris Teeter	3	\$65.80	4.83%	3	\$58.30	4.89%
7	C&S Independents	14	\$54.84	4.02%	18	\$50.10	4.20%
8	Aldi	5	\$42.30	3.10%	4	\$32.10	2.69%
9	Save-A-Lot	4	\$20.70	1.52%	7	\$35.40	2.97%
10	International Markets	2	\$19.20	1.41%	2	\$18.40	1.54%
		86	\$1,322.41	97.04%	93	\$1,168.01	97.95%

The chart above 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.

Total supermarket sales for the area are \$1.36 billion.

Source: Food World, June 2021



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Eastern Shore Market Leaders:

Walmart, Food Lion Outpace All Merchants; Albertsons, Giant Food Also Post Sales Increases

- Alts. Share Grows To 50.8%
- With Only 14 Units, WM Still #1
- Drug Chains Control 13.6%
- Wawa, Royal Farms Battle
- Walmart, Target Control 17.9%

Rank	Company	2021 Stores	2021 Sales (in millions)	% of 2021 Market	2020 Stores	2020 Sales (in millions)	% of 2020 Market
1	Walmart (SuperCenter)	14	\$446.70	16.20%	14	\$417.40	16.21%
2	Food Lion	33	\$421.40	15.28%	33	\$378.70	15.02%
3	Albertsons (Acme/Safeway)	10	\$270.26	9.80%	10	\$228.57	9.07%
4	Giant Food	4	\$209.62	7.60%	5	\$178.14	7.07%
5	Walgreens	34	\$183.60	6.66%	34	\$175.00	6.94%
6	Redner's Markets	6	\$147.50	5.35%	6	\$130.10	5.16%
7	Wawa	22	\$147.41	5.35%	22	\$142.19	5.64%
8	Royal Farm Stores	56	\$131.50	4.77%	55	\$121.40	4.81%
9	Rite Aid	29	\$100.00	3.63%	29	\$94.90	3.76%
10	CVS	18	\$90.70	3.29%	18	\$85.90	3.41%
11	Sam's Club	2	\$81.60	2.96%	2	\$73.50	2.92%
12	BJ's Wholesale Club	2	\$75.40	2.73%	2	\$67.20	2.67%
13	Weis Markets	5	\$70.79	2.57%	5	\$58.20	2.31%
14	Harris Teeter	3	\$65.80	2.39%	3	\$58.30	2.31%
15	Fas-Marts	40	\$63.20	2.29%	39	\$59.70	2.37%
16	C&S Independents	14	\$54.84	1.99%	18	\$50.10	1.99%
17	Target	3	\$46.40	1.68%	3	\$41.70	1.65%
18	Aldi	5	\$42.30	1.53%	4	\$32.10	1.27%
19	7-Eleven	16	\$33.70	1.22%	16	\$30.40	1.21%
20	Save-A-Lot	4	\$20.70	0.75%	7	\$35.40	1.40%
		320	\$2,703.42	98.03%	325	\$2,458.90	97.53%

The chart above 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, Kmart, Target and Walmart are extrapolated to include comparable categories, as explained in the formula on page 99. 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: \$2.58 billion. Source: Food World, June 2021

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IN REVIEW: THE GIANT COMPANY

State	County	2021 Stores	2021 Sales (in millions)	2021 County Food Sales	% of 2021 County Market	2020 Stores	2020 Sales (in millions)	% of 2020 County Market
MD	Carroll (Martin's)	1	\$72.79	\$663.10	10.98%	1	\$63.62	10.69%
MD	Cecil (Martin's)	1	\$56.22	\$279.30	20.13%	1	\$48.92	19.44%
MD	Washington (Martin's)	4	\$165.94	\$520.60	31.87%	4	\$141.61	30.70%

MD Recap: 6 stores with sales of \$294.95 million. Total retail food sales for MD in the study: \$20.8 billion. The Giant Company share of MD is 1.42%.

PA	Adams	1	\$59.44	\$200.40	29.66%	1	\$52.63	28.43%
PA	Cumberland	10	\$448.61	\$1,138.40	39.41%	9	\$396.02	39.31%
PA	Dauphin	9	\$438.40	\$1,022.10	42.89%	8	\$377.06	40.70%
PA	Franklin	4	\$148.67	\$459.90	32.33%	4	\$124.78	30.18%
PA	Lancaster	13	\$469.10	\$1,740.00	26.96%	12	\$422.77	27.17%
PA	Lebanon	3	\$91.00	\$409.60	22.22%	3	\$84.68	22.32%
PA	Perry	1	\$29.27	\$111.80	26.18%	1	\$22.69	22.78%
PA	York	10	\$522.09	\$1,569.30	33.27%	10	\$455.70	32.07%

PA Recap: 51 stores with sales of \$2.21 billion. Total retail food sales for PA in the study: \$6.65 billion. The Giant Company share of PA is 33.17%.

VA	Culpeper (Martin's)	1	\$43.23	\$164.80	26.23%	1	\$32.73	23.30%
VA	Frederick (Martin's)	3	\$154.34	\$496.30	31.10%	3	\$126.36	27.63%
VA	Warren (Martin's)	1	\$55.79	\$146.80	38.00%	1	\$47.84	34.12%

VA Recap: 5 stores with sales of \$253.36 million. Total retail food sales for VA in the study: \$23.5 billion. The Giant Company share of VA is 1.08%.

Mid-Atlantic Recap: 62 stores with sales of \$2.75 billion annually. Mid-Atlantic retail food sales total: \$54.9 billion.

The Giant Company Per Store Average: \$44.43 million

() Indicates another banner used by the company.

Source: *Food World*, June 2021



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IN REVIEW: WHOLE FOODS

State	County	2021 Stores	2021 Sales (in millions)	2021 County Food Sales	% of 2021 County Market	2020 Stores	2020 Sales (in millions)	% of 2020 County Market
DC	Washington	6	\$256.50	\$2,414.60	10.62%	5	\$193.60	8.81%
DC Recap: 6 stores with sales of \$256.5 million. Total retail food sales for DC in the study: \$2.41 billion. Whole Foods share of DC is 10.62%.								
MD	Anne Arundel	1	\$52.40	\$2,275.40	2.30%	1	\$48.90	2.40%
MD	Baltimore City	2	\$67.40	\$1,520.20	4.43%	2	\$61.80	4.52%
MD	Howard	1	\$36.80	\$1,175.20	3.13%	1	\$34.10	3.13%
MD	Montgomery	5	\$224.90	\$3,640.10	6.18%	5	\$207.20	6.07%
MD	Prince George's	1	\$32.70	\$3,085.20	1.06%	1	\$30.30	1.07%
MD Recap: 10 stores with sales of \$414.2 million. Total retail food sales for MD in the study: \$20.8 billion. Whole Foods share of MD is 1.99%.								
PA	Lancaster	1	\$37.00	\$1,740.00	2.13%	1	\$34.40	2.21%
PA Recap: 1 store with sales of \$37.0 million. Total retail food sales for PA in the study: \$6.65 billion. Whole Foods share of PA is 0.56%.								
VA	Albemarle	1	\$35.60	\$641.70	5.55%	1	\$33.20	5.73%
VA	Arlington	2	\$79.20	\$949.80	8.34%	2	\$73.10	8.64%
VA	Fairfax	7	\$276.50	\$5,331.40	5.19%	7	\$263.70	5.44%
VA	Hampton/Newport News	1	\$32.30	\$1,121.80	2.88%	1	\$29.10	2.77%
VA	Henrico	2	\$44.60	\$1,905.30	2.34%	2	\$41.80	2.38%
VA	Loudoun	1	\$32.80	\$1,472.40	2.23%	1	\$30.60	2.22%
VA	Virginia Beach	1	\$34.20	\$1,654.60	2.07%	1	\$31.50	2.10%

VA Recap: 15 stores with sales of \$535.2 million. Total retail food sales for VA in the study: \$23.56 billion. Whole Foods share of VA is 2.28%.

Mid-Atlantic Recap: 32 stores with sales of \$1.24 billion annually. Mid-Atlantic retail food sales total: \$54.9 billion.

Whole Foods Per Store Average: \$38.84 million

Source: Food World, June 2021



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Central Pennsylvania Supermarket Leaders:

The Giant Company Now Controls 53.2% Of CPA Supermarket Biz; Weis Markets Posts Strong Sales

- TGC Adds 3, Dominance Grows
- Strong Comps Boost Weis
- C&S Indies: Fewer Units, More Sales
- Karns Remains Solid #4
- Aldi Gains With New Location

Rank	Company	2021 Stores	2021 Sales (in millions)	% of 2021 Market	2020 Stores	2020 Sales (in millions)	% of 2020 Market
1	The Giant Company (Martin's)	51	\$2,206.58	53.22%	48	\$1,936.33	53.15%
2	Weis Markets	38	\$802.01	19.34%	38	\$680.00	18.66%
3	C&S Independents	52	\$232.49	5.61%	57	\$201.23	5.52%
4	Karns Prime & Fancy Foods	9	\$171.00	4.12%	9	\$154.00	4.23%
5	Family Owned Markets	7	\$127.48	3.07%	7	\$108.70	2.98%
6	Aldi	15	\$125.70	3.03%	14	\$105.00	2.88%
7	Wegmans	2	\$124.40	3.00%	2	\$115.00	3.16%
8	Grocery Outlet	10	\$64.10	1.55%	10	\$62.10	1.70%
9	IGA	6	\$50.60	1.22%	6	\$49.40	1.36%
10	Redner's Markets	3	\$49.80	1.20%	3	\$44.00	1.21%
		193	\$3,954.16	95.36%	194	\$3,455.76	94.85%

The chart above lists 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 \$4.15 billion.

Source: Food World, June 2021

Central Pennsylvania Market Leaders:

TGC Rules The Roost In \$6.7 Billion Market; Weis Overtakes Walmart For Second Place In Region

- Alternates' Share Dips To 35.3%
- TGC Remains All-Channel King
- WM Aided By E-Commerce Gains
- Big 3 Drug Chains: 8.1% Share
- C-Stores Control 8.5% Of Mkt.

Rank	Company	2021 Stores	2021 Sales (in millions)	% of 2021 Market	2020 Stores	2020 Sales (in millions)	% of 2020 Market
1	The Giant Company (Martin's)	51	\$2,206.58	33.17%	48	\$1,936.33	32.33%
2	Weis Markets	38	\$802.01	12.06%	38	\$680.00	11.35%
3	Walmart (SuperCenter)	20	\$707.10	10.63%	20	\$652.80	10.90%
4	CVS	74	\$339.00	5.10%	72	\$314.90	5.26%
5	Sheetz	71	\$274.70	4.13%	68	\$247.40	4.13%
6	C&S Independents	52	\$232.49	3.50%	57	\$201.23	3.36%
7	Rite Aid	60	\$196.10	2.95%	60	\$187.50	3.13%
8	Target	11	\$184.30	2.77%	11	\$160.30	2.68%
9	Karns Prime & Fancy Foods	9	\$171.00	2.57%	9	\$154.00	2.57%
10	Turkey Hill	113	\$163.60	2.46%	116	\$164.30	2.74%
11	Sam's Club	4	\$162.00	2.44%	4	\$145.70	2.43%
12	Rutter's Farm Stores	67	\$127.50	1.92%	67	\$120.60	2.01%
13	Family Owned Markets	7	\$127.48	1.92%	7	\$108.70	1.82%
14	Aldi	15	\$125.70	1.89%	14	\$105.00	1.75%
15	Wegmans	2	\$124.40	1.87%	2	\$115.00	1.92%
16	BJ's Wholesale Club	4	\$113.20	1.70%	4	\$102.50	1.71%
17	Costco	2	\$82.50	1.24%	2	\$75.20	1.26%
18	Grocery Outlet	10	\$64.10	0.96%	10	\$62.10	1.04%
19	IGA	6	\$50.60	0.76%	6	\$49.40	0.82%
20	Redner's Markets	3	\$49.80	0.75%	3	\$44.00	0.73%
		619	\$6,304.16	94.78%	618	\$5,626.96	93.96%


The chart above 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, Kmart, Target and Walmart are extrapolated to include comparable categories, as explained in the formula on page 99. 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 \$6.65 billion.


Source: Food World, June 2021

PENNSYLVANIA COUNTY SHARE OF MARKET: 2021

Total sales for those Pennsylvania counties included in the study are \$6.65 billion

Rank	Company	Stores	Sales (in millions)	% of Market
 ADAMS COUNTY (\$200.4 million) (Includes Gettysburg, Littlestown) <ul style="list-style-type: none"> Population 103,009 # of Households 39,345 Median Income \$67,253 Under 18 19.8% Over 65 21.1% Female 50.8% White 88.7% Black 2.0% Hispanic 7.3% Asian 0.9% 				
1	The Giant Company	1	\$59.44	29.66%
2	Weis Markets	2	\$35.14	17.53%
3	IGA	3	\$31.72	15.83%
4	Walmart	1	\$20.40	10.18%
5	Sheetz	4	\$16.90	8.43%
6	Rutter's Farm Stores	4	\$8.30	4.14%
7	7-Eleven	3	\$6.90	3.44%
8	Rite Aid	2	\$5.80	2.89%
9	CVS	1	\$4.90	2.45%
10	Turkey Hill	2	\$3.10	1.55%

11	Royal Farm Stores	1	\$2.70	1.35%
12	C&S Independents	1	\$0.24	0.12%
		25	\$195.54	97.57%



CUMBERLAND COUNTY (\$1.1 billion)
(Includes Carlisle, Mechanicsville)

- Population 253,370
- # of Households 99,804
- Median Income \$71,269
- Under 18 20.2%
- Over 65 18.8%
- Female 50.5%
- White 84.6%
- Black 4.7%
- Hispanic 4.3%
- Asian 4.8%

1	The Giant Company	10	\$448.61	39.41%
2	Walmart (SuperCenter)	4	\$113.70	9.99%
3	Weis Markets	5	\$100.45	8.82%
4	Karns Prime & Fancy Foods	4	\$79.00	6.94%
5	CVS	14	\$64.10	5.63%
6	Wegmans	1	\$59.20	5.20%
7	Sheetz	14	\$53.10	4.66%
8	Rite Aid	12	\$43.80	3.85%
9	BJ's Wholesale Club	1	\$38.10	3.35%
10	Aldi	4	\$35.40	3.11%
11	Sam's Club	1	\$32.50	2.85%

See PENNSYLVANIA COUNTY SHARE on page 80



STUFFED with THE STUFF YOU LOVE

Engaging consumers with a campaign that appeals to the ever-busy millennial family. They have a love for the classics, but not the time to make it. That's why they choose to feed their families Mrs. T's Pierogies. **Drive consumers down the frozen aisle and order some Mrs. T's today!**

Proud Supporter of the NFRA.

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Mrs. T's Pierogies

INTEGRATED MARKETING CAMPAIGN

Reaching Consumers:
• At Home • In-Store • On-The-Go

360° APPROACH

Shopper Marketing, Social Media, Influencers/Blog/PR, Digital, Streaming, Promotional, Radio.

mrstspierogies.com

TRADE CALENDAR

July 11-13 - CANCELLED

Seafood Expo North America has cancelled its re-scheduled show this year and will not be holding a 2021 show. For more information, go to www.seafoodexpo.com/north-america.

July 13

Weis Markets will hold its annual charity golf outing at several area courses near the company's Sunbury, PA headquarters. For detail and to register online, go to www.weischaritygolf.com.

July 19

The Ahold Delhaize Family Foundation golf outing will be held on 12 area golf courses near the retailer's headquarters. Registration begins at 7:30 a.m., followed by a shotgun start at 9:00 a.m. This year's outing will end after golf and there will be no dinner/auction/raffle.

August 5

Boyer's Food Markets will

host the Harold S. Boyer Memorial Golf Outing at Mountain Valley Golf Course in Barnesville, PA with all proceeds benefiting local food banks. Registrations is at 8:30 a.m. followed by a shotgun start at 10:00 a.m. and dinner and awards at 3:30 p.m. For more information, email Dean Walker or Anthony Gigliotti at deanw@boyersfood.com or antgig@boyersfood.com, or call 570.366.1477.

September 2

Family Owned Markets will hold the 18th annual Heather "Kappesser" DiGuardi Memorial Charity Golf Outing at Foxchase Golf Club in Stevens, PA. registration opens at 11:15 a.m. and the shotgun start is at 12:45 p.m., followed by dinner, prizes and raffles. For more information, contact Jim Kidwell at 717.583.3537 or jim.kidwell@familyownedmarkets.com.

September 19-21 NEW DATES

The NGA Show will be held, in-person, at the recently renovated Paris Hotel and Casino in Las Vegas. Registration for the 2021 NGA Show will open in May. All attendees will be required to adhere to safety protocols and government regulations during the event. More information on educational sessions, exhibits and other networking events can be found at www.thengashow.com.

September 23-25

Expo East is scheduled to be held in Philadelphia. For more information, go to www.expoeast.com/en/events-education.html.

September 27-29 - NEW DATES

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

October 28-30

The PMA show is scheduled to be held in New Orleans. For more information, go to www.pma.com/events/freshsummitexhibitors/service-kit/future-events.

November 6

The 37th annual Children's Cancer Foundation gala is scheduled to be held at Martin's Crosswinds in Greenbelt, MD. For more information, go to www.childrenscancerfoundation.org.

December 1-3

The NGA Show: Southeast Summit, an intimate hosted buyer/vendor gathering to address the evolving needs of grocers, will be held at the Hyatt Regency in Orlando. For more information, go to www.thengashow.com/press-release-new-nga-2021-dates.

December 13-17

The 12th Annual New York Produce Show sponsored by the Eastern Produce Council will be held at the Javits Center and Hilton Midtown in New York City. For more information, go to easternproduceCouncil.com/event-calendar.php.

March 13-15, 2022

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

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

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

PENNSYLVANIA COUNTY SHARE OF MARKET: 2021

Continued from page 78

12	Target	2	\$32.30	2.84%
13	Military Commissaries	1	\$12.52	1.10%
14	Turkey Hill	8	\$12.40	1.09%
15	Rutter's Farm Stores	4	\$8.10	0.71%
16	Grocery Outlet	1	\$7.10	0.62%
17	7-Eleven	1	\$2.40	0.21%
		87	\$1,142.78	100.38%*

6	Sheetz	12	\$52.60	5.15%
7	Costco	1	\$50.70	4.96%
8	Rite Aid	12	\$39.20	3.84%
9	Sam's Club	1	\$35.30	3.45%
10	Target	2	\$26.90	2.63%
11	Turkey Hill	16	\$19.80	1.94%
12	Aldi	2	\$18.50	1.79%
13	ShopRite (Price Rite)	1	\$15.60	1.53%
14	C&S Independents	8	\$12.45	1.22%
15	Sharp Shopper	1	\$11.30	1.11%
16	7-Eleven	5	\$11.00	1.08%
17	Boyer's Markets	1	\$10.66	1.04%
18	Save A Lot	1	\$6.00	0.59%
19	Rutter's Farm Stores	2	\$4.60	0.45%
		97	\$1,021.60	99.95%



DAUPHIN COUNTY (\$1.0 billion) (Includes Harrisburg, Middletown, Millersburg)

• Population	278,299	• Female	51.5%
• # of Households	112,212	• White	64.5%
• Median Income	\$60,715	• Black	19.2%
• Under 18	22.5%	• Hispanic	9.9%
• Over 65	17.4%	• Asian	5.3%

1	The Giant Company	9	\$438.40	42.89%
2	Walmart (SuperCenter)	2	\$77.40	7.57%
3	Weis Markets	4	\$70.09	6.86%
4	CVS	14	\$62.30	6.10%
5	Karns Prime & Fancy Foods	3	\$59.00	5.77%

See PENNSYLVANIA COUNTY SHARE on page 81



Thank you for the trust you continue to place in our family of brands.



PENNSYLVANIA COUNTY SHARE OF MARKET: 2021

Continued from page 80

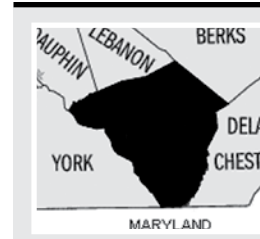


FRANKLIN COUNTY (\$459.9 million) (Includes Chambersburg, Greencastle, Waynesboro)

• Population	155,027	• Female	50.8%
• # of Households	60,438	• White	87.5%
• Median Income	\$63,379	• Black	4.2%
• Under 18	22.1%	• Hispanic	6.1%
• Over 65	20.1%	• Asian	1.1%

1	The Giant Company (Martin's)	4	\$148.67	32.33%
2	Walmart (SuperCenter)	2	\$79.20	17.22%
3	Weis Markets	2	\$35.50	7.72%
4	Sheetz	8	\$29.90	6.50%
5	BJ's Wholesale Club	1	\$29.30	6.37%
6	Great Valu	2	\$22.90	4.98%
7	CVS	5	\$21.10	4.59%
8	Target	1	\$16.20	3.52%
9	Rite Aid	4	\$15.40	3.35%
10	Rutter's Farm Stores	7	\$15.20	3.31%
11	Food Lion	1	\$10.90	2.37%
12	Save A Lot	2	\$7.80	1.70%

13	Aldi	1	\$7.40	1.61%
14	Grocery Outlet	1	\$6.50	1.41%
15	Walgreens	1	\$5.40	1.17%
16	C&S Independents	2	\$4.05	0.88%
17	Turkey Hill	1	\$2.30	0.50%
		45	\$457.72	99.53%



LANCASTER COUNTY (\$1.7 billion) (Includes Lancaster, Ephrata)

• Population	545,724	• Female	51.0%
• # of Households	201,620	• White	81.3%
• Median Income	\$66,056	• Black	5.2%
• Under 18	23.4%	• Hispanic	11.0%
• Over 65	18.4%	• Asian	2.5%

1	The Giant Company	13	\$469.10	26.96%
2	Weis Markets	13	\$275.80	15.85%
3	C&S Independents	20	\$143.02	8.22%
4	Walmart (SuperCenter)	3	\$128.80	7.40%
5	CVS	24	\$112.50	6.47%
6	Turkey Hill	59	\$87.40	5.02%

See PENNSYLVANIA COUNTY SHARE on page 83



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IN REVIEW: ALBERTSONS MID-ATLANTIC

State	County	2021 Stores	2021 Sales (in millions)	2021 County Food Sales	% of 2021 County Market	2020 Stores	2020 Sales (in millions)	% of 2020 County Market
DC	Washington (Safeway)	12	\$354.73	\$2,414.60	14.69%	11	\$294.66	13.41%

DC Recap: 12 stores with sales of \$354.73 million. Total retail food sales for DC in the study: \$2.41 billion. Albertsons Mid-Atlantic share of DC is 14.69%.

DE	Kent (Acme/Safeway)	2	\$53.98	\$515.80	10.47%	2	\$44.96	9.63%
DE	Sussex (Acme/Safeway)	2	\$62.52	\$966.30	6.47%	2	\$46.87	5.42%

DE Recap: 4 stores with sales of \$116.5 million. Total retail food sales for DE in the study: \$1.48 billion. Albertsons Mid-Atlantic share of DE is 7.86%.

MD	Anne Arundel (Safeway)	8	\$220.53	\$2,275.40	9.69%	8	\$189.43	9.29%
MD	Baltimore City (Safeway)	3	\$85.41	\$1,520.20	5.62%	3	\$69.13	5.05%
MD	Baltimore County (Safeway)	6	\$138.21	\$3,273.90	4.22%	6	\$109.35	3.73%
MD	Calvert (Safeway)	2	\$59.82	\$387.30	15.45%	2	\$50.79	14.52%
MD	Carroll (Safeway)	3	\$93.72	\$663.10	14.13%	3	\$83.13	13.96%
MD	Cecil (Acme)	1	\$22.16	\$279.30	7.93%	1	\$16.80	6.68%
MD	Charles (Safeway)	3	\$93.63	\$516.30	18.13%	3	\$79.58	17.69%
MD	Frederick (Safeway)	2	\$33.93	\$907.30	3.74%	2	\$28.99	3.50%
MD	Harford (Safeway)	1	\$30.73	\$1,020.80	3.01%	1	\$26.29	2.83%
MD	Howard (Safeway)	3	\$71.80	\$1,175.20	6.11%	3	\$63.83	5.85%
MD	Kent (Acme)	1	\$19.40	\$99.70	19.46%	1	\$16.70	17.43%
MD	Montgomery (Balducci's/Safeway)	19	\$482.97	\$3,640.10	13.27%	18	\$389.29	11.41%
MD	Prince George's (Safeway)	9	\$255.32	\$3,085.20	8.28%	9	\$208.10	7.34%
MD	Queen Anne's (Acme/Safeway)	2	\$61.20	\$136.80	44.74%	2	\$55.14	42.22%
MD	Talbot (Acme)	1	\$19.41	\$217.10	8.94%	1	\$19.20	9.79%
MD	Wicomico (Acme)	1	\$36.30	\$279.40	12.99%	1	\$32.90	12.49%
MD	Worcester (Acme)	1	\$17.45	\$230.70	7.56%	1	\$12.80	6.10%

MD Recap: 66 stores with sales of \$1.74 billion. Total retail food sales for MD in the study: \$20.8 billion. Albertsons Mid-Atlantic share of MD is 8.37%.

VA	Arlington (Safeway)	4	\$69.86	\$949.80	7.36%	4	\$64.85	7.67%
VA	Culpeper (Safeway)	1	\$14.21	\$164.80	8.62%	1	\$10.57	7.52%
VA	Fairfax (Balducci's/Safeway)	26	\$559.99	\$5,331.40	10.50%	24	\$470.81	9.71%
VA	Fauquier (Safeway)	1	\$19.06	\$176.90	10.77%	1	\$15.16	9.12%
VA	Loudoun (Safeway)	4	\$49.88	\$1,472.40	3.39%	4	\$45.76	3.32%
VA	Prince William (Safeway)	4	\$74.59	\$1,856.40	4.02%	4	\$60.50	3.58%

VA Recap: 40 stores with sales of \$787.59 million. Total retail food sales for VA in the study: \$23.56 billion. Albertsons Mid-Atlantic share of VA is 3.34%.

Mid-Atlantic Recap: 122 stores with sales of \$3.0 billion annually. Mid-Atlantic retail food sales total: \$54.9 billion. Albertsons Mid-Atlantic Per Store Average: \$24.6 million

() - Indicates another banner used by the company

Source: *Food World*, June 2021

PENNSYLVANIA COUNTY SHARE OF MARKET: 2021

Continued from page 81

7	Family Owned Markets	4	\$87.28	5.02%
8	Wegmans	1	\$65.20	3.75%
9	Sheetz	16	\$59.50	3.42%
10	Target	3	\$54.10	3.11%
11	Whole Foods	1	\$37.00	2.13%
12	Aldi	4	\$32.40	1.86%
13	Costco	1	\$31.80	1.83%
14	BJ's Wholesale Club	1	\$25.20	1.45%
15	Grocery Outlet	4	\$23.70	1.36%
16	Sharp Shopper	2	\$22.90	1.32%
17	Wawa	4	\$22.56	1.30%
18	Rite Aid	6	\$17.20	0.99%
19	Redner's Markets	1	\$14.60	0.84%
20	High's/Baltimore	4	\$12.10	0.70%
21	Rutter's Farm Stores	4	\$9.30	0.53%
22	Family Owned Markets	1	\$6.20	0.36%
23	Kmart	1	\$6.10	0.35%
24	Walgreens	1	\$5.30	0.30%
25	Save A Lot	1	\$4.90	0.28%

26	IGA	1	\$3.90	0.22%
27	Royal Farm Stores	1	\$2.40	0.14%
		194	\$1,760.26	100.81%*



LEBANON COUNTY (\$409.6 million) (Includes Lebanon)

- Population 141,793
- # of Households 53,579
- Median Income \$60,281
- Under 18 22.7%
- Over 65 19.9%
- Female 50.8%
- White 81.0%
- Black 3.7%
- Hispanic 14.1%
- Asian 1.5%

1	The Giant Company	3	\$91.00	22.22%
2	Walmart (SuperCenter)	2	\$82.10	20.04%
3	Weis Markets	3	\$59.43	14.51%
4	C&S Independents	7	\$47.55	11.61%
5	Redner's Markets	2	\$35.20	8.59%
6	Rite Aid	5	\$17.00	4.15%
7	CVS	4	\$16.90	4.13%
8	Turkey Hill	10	\$14.70	3.59%
9	Sheetz	2	\$9.00	2.20%
10	America's Food Basket (Ideal)	1	\$7.59	1.85%
11	Aldi	1	\$6.90	1.68%

See PENNSYLVANIA COUNTY SHARE on page 84

The Natural Choice!

Our delicious Calzones are made in small aged batches that are fermented throughout the process. We fill our products with naturally aged cheeses that are freshly shredded the day of production. Our family continuously checks each batch to make sure our customers understand and taste the natural differences. We slice our meats throughout the day so you can taste the fresh difference.

Give us a call so we can show you the natural difference!
704.827.0245 Sales Department



www.DePaloFoods.com



PENNSYLVANIA COUNTY SHARE OF MARKET: 2021

Continued from page 83

12	Save A Lot	1	\$6.80	1.66%
13	Grocery Outlet	1	\$6.20	1.51%
14	Rutter's Farm Stores	2	\$4.80	1.17%
15	IGA	1	\$3.28	0.80%
		45	\$408.45	99.72%

3	Walmart (SuperCenter)	6	\$205.50	13.10%
4	Sam's Club	2	\$94.20	6.00%
5	Rutter's Farm Stores	43	\$74.80	4.77%
6	CVS	12	\$57.20	3.64%
7	Target	3	\$54.80	3.49%
8	Rite Aid	16	\$44.30	2.82%
9	Sheetz	13	\$43.30	2.76%
10	Family Owned Markets	3	\$40.20	2.56%
11	Aldi	3	\$25.30	1.61%
12	Turkey Hill	17	\$23.90	1.52%
13	Royal Farm Stores	8	\$21.50	1.37%
14	BJ's Wholesale Club	1	\$20.60	1.31%
15	Grocery Outlet	3	\$20.60	1.31%
16	C&S Independents	9	\$20.49	1.31%
17	Karns Prime & Fancy Foods	1	\$17.00	1.08%
18	Walgreens	3	\$16.30	1.04%
19	ShopRite	1	\$14.40	0.92%
20	Great Valu	1	\$13.50	0.86%
21	IGA	1	\$11.70	0.75%
22	Lidl	1	\$6.30	0.40%
23	Food Lion	1	\$4.80	0.31%
24	Save A Lot	1	\$4.40	0.28%
25	High's/Baltimore	1	\$2.80	0.18%
		168	\$1,566.46	99.82%

() 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 2021



PERRY COUNTY (\$111.8 million) (Includes New Bloomfield)

• Population	46,272	• Female	49.4%
• # of Households	18,231	• White	95.0%
• Median Median Income	\$63,718	• Black	1.2%
• Under 18	21.3%	• Hispanic	2.3%
• Over 65	19.0%	• Asian	0.5%

1	The Giant Company	1	\$29.27	26.18%
2	Weis Markets	1	\$19.12	17.10%
3	Karns Prime & Fancy Foods	1	\$16.00	14.31%
4	Tri-State Co-Op	1	\$14.48	12.95%
5	Rite Aid	3	\$13.40	11.99%
6	Sheetz	2	\$10.40	9.30%
7	C&S Independents	5	\$4.69	4.19%
8	Rutter's Farm Stores	1	\$2.40	2.15%
		15	\$109.76	98.18%



YORK COUNTY (\$1.6 billion) (Includes Hanover, Shrewsbury, York)

• Population	449,058	• Female	50.6%
• # of Households	172,421	• White	82.6%
• Median Median Income	\$66,457	• Black	7.1%
• Under 18	22.0%	• Hispanic	8.1%
• Over 65	18.0%	• Asian	1.5%

1	The Giant Company	10	\$522.09	33.27%
2	Weis Markets	8	\$206.48	13.16%

No Kittens.

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Is your next event listed in the Mid-Atlantic food market's number one calendar of events?

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We'll publish your special event listing in the Trade Calendar of Events.

Contact

Terri Maloney, Editor

410-730-5013 or

terri@foodtradenews.com

Jennifer Saenz, Former President Of Pepsi's Global Food Unit, Joins Albertsons As EVP-CMO

from page 1

CEO.

Geoff White, currently Albertsons' EVP and chief merchandising officer, remains with the company but is currently on a leave of absence.

"We're excited to welcome Jennifer to the Albertsons team," said Sankaran. "A commitment to serving our customers with a broad and differentiated assortment of products is a key aspect of our transformation strategy. Jennifer's extensive global industry experience and proven track record of driving growth through marketing, analytics and product innovation, grounded in a deep understanding of the consumer, will allow her to make significant contributions to our business and elevate the Albertsons brand for our customers, brand partners and associates." Saenz, 43, has more than 15

years of experience in the consumer packaged goods sector, holding roles of increasing responsibility within PepsiCo since 2005. Since 2019, she has served as global chief marketing officer and president of the company's global foods, with responsibility for the \$30 billion PepsiCo Foods portfolio. From 2015 to 2019 Saenz served as SVP and CMO of PepsiCo Foods North America, where she accelerated growth and drove innovation for the \$16 billion snacking portfolio. From 2009 to 2015 she held a number of brand and customer marketing positions within Frito-Lay.

"I am honored to join Albertsons, and to work with Vivek and the company's talented management team," said Saenz. "Albertsons is undertaking a transformation that is further strengthening its position as an industry leader focused on deepening its relationship with customers. I



Jennifer Saenz

am excited to leverage my experience and partner with our vendors to continue providing great products and great value to our customers."

Saenz graduated from The Goizueta School of Business at Emory University with a bachelor of business administration and received an MBA from The Wharton School at the University of Pennsyl-

vania. Saenz has been recognized for her professional accomplishments through a number of awards, including Fast Company's Most Creative People in 2018, Brand Innovators' Top 100 Women in Marketing in 2017, 2018 and 2019, and AdWeek's Brand Genius Award in 2017.

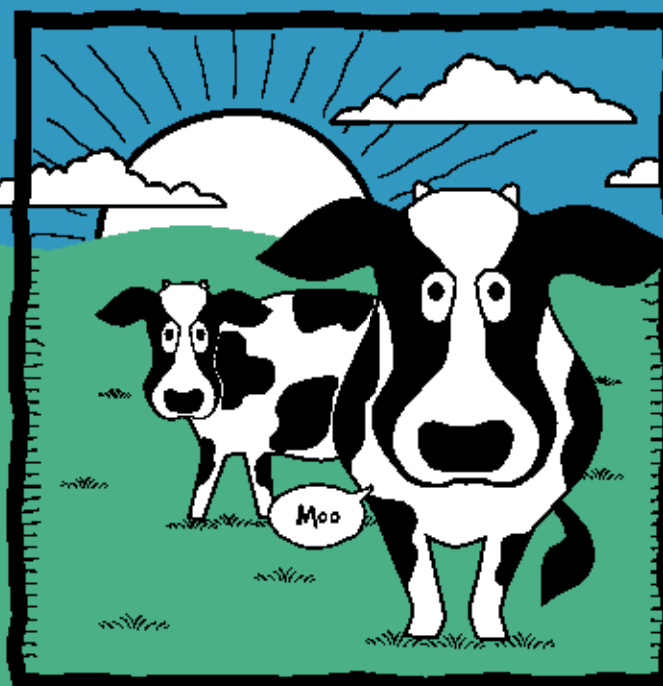
White was promoted to EVP and chief merchant at Albertsons in September 2019. He had previously served as president of the retailer's "own brands" division, beginning in April 2017. Prior to that, White was SVP of marketing and merchandising for the Northern California Division (Safeway stores) from 2015 to April 2017. From 2004 to 2015, White held various leadership roles, including director of Canadian produce operations, at Safeway. He started with Safeway at the store level in Burnaby, British Columbia, in 1981.

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from Cloverland Dairy



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As our economy begins to open up, and we get together to enjoy the warmer weather, Cloverland's ice cream mix can help us all get back to feeling normal!

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IN REVIEW: WEIS MARKETS

State	County	2021 Stores	2021 Sales (in millions)	2021 County Food Sales	% of 2021 County Market	2020 Stores	2020 Sales (in millions)	% of 2020 County Market
DE	Sussex	4	\$59.90	\$966.30	6.20%	4	\$50.30	5.82%
DE Recap: 4 stores with sales of \$59.9 million. Total retail food sales for DE in the study: \$1.48 billion. Weis Markets share of DE is 4.04%.								
MD	Anne Arundel	3	\$47.38	\$2,275.40	2.08%	3	\$39.80	1.95%
MD	Baltimore County	12	\$256.90	\$3,273.90	7.85%	12	\$230.10	7.85%
MD	Calvert	3	\$41.50	\$387.30	10.72%	3	\$34.60	9.89%
MD	Carroll	5	\$95.16	\$663.10	14.35%	5	\$81.00	13.60%
MD	Charles	1	\$11.82	\$516.30	2.29%	1	\$9.40	2.09%
MD	Frederick	6	\$126.38	\$907.30	13.93%	6	\$112.90	13.64%
MD	Harford	2	\$44.71	\$1,020.80	4.38%	2	\$36.90	3.97%
MD	Howard	3	\$59.10	\$1,175.20	5.03%	4	\$66.70	6.12%
MD	Montgomery	2	\$26.97	\$3,640.10	0.74%	3	\$32.00	0.94%
MD	Prince George's	3	\$38.57	\$3,085.20	1.25%	3	\$33.30	1.17%
MD	St. Mary's	2	\$34.31	\$396.70	8.65%	2	\$27.80	7.88%
MD	Talbot	1	\$10.89	\$217.10	5.02%	1	\$7.90	4.03%
MD	Washington	3	\$65.57	\$520.60	12.60%	3	\$56.50	12.25%
MD Recap: 46 stores with sales of \$859.26 million. Total retail food sales for MD in the study: \$20.8 billion. Weis Markets share of MD is 4.13%.								
PA	Adams	2	\$35.14	\$200.40	17.53%	2	\$28.30	15.29%
PA	Cumberland	5	\$100.45	\$1,138.40	8.82%	5	\$81.30	8.07%
PA	Dauphin	4	\$70.09	\$1,022.10	6.86%	4	\$56.90	6.14%
PA	Franklin	2	\$35.50	\$459.90	7.72%	2	\$30.40	7.35%
PA	Lancaster	13	\$275.80	\$1,740.00	15.85%	13	\$245.60	15.78%
PA	Lebanon	3	\$59.43	\$409.60	14.51%	3	\$50.10	13.21%
PA	Perry	1	\$19.12	\$111.80	17.10%	1	\$16.00	16.06%
PA	York	8	\$206.48	\$1,569.30	13.16%	8	\$171.40	12.06%
PA Recap: 38 stores with sales of \$802.01 million. Total retail food sales for PA in the study: \$6.65 billion. Weis Markets share of PA is 12.06%.								
VA	Culpeper	1	\$11.84	\$164.80	7.18%	1	\$9.30	6.62%
VA	Spotsylvania	5	\$55.39	\$767.80	7.21%	5	\$42.70	6.15%
VA	Stafford	3	\$40.66	\$428.40	9.49%	3	\$33.00	9.01%
VA Recap: 9 stores with sales of \$107.89 million. Total retail food sales for VA in the study: \$23.56 billion. Weis Markets share of VA is 0.46%.								

Mid-Atlantic Recap: 97 stores with sales of \$1.83 billion annually. Mid-Atlantic retail food sales total: \$54.9 billion.

Weis Markets Per Store Average: \$18.56 million

Source: Food World, June 2021

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Richmond Supermarket Leaders:

Kroger Still Leader Among Supers; Food Lion, Publix Make Inroads In \$1.9 Billion Market

- Sales Up, Share Dips At Kroger
- Revenue Gains Continue At FL
- Publix Sales Aided By 3 New Units
- Wegmans Hit By Dept. Closures
- Aldi Remains Discount Leader

Rank	Company	2021 Stores	2021 Sales (in millions)	% of 2021 Market	2020 Stores	2020 Sales (in millions)	% of 2020 Market
1	Kroger (Marketplace)	18	\$639.00	32.96%	18	\$602.70	35.30%
2	Food Lion	48	\$590.90	30.48%	48	\$531.00	31.10%
3	Publix	16	\$243.40	12.55%	13	\$176.80	10.35%
4	Wegmans	2	\$128.60	6.63%	2	\$119.70	7.01%
5	Aldi	11	\$80.80	4.17%	11	\$72.40	4.24%
6	International Markets	6	\$56.00	2.89%	6	\$52.70	3.09%
7	Whole Foods	2	\$44.60	2.30%	2	\$41.80	2.45%
8	Trader Joe's	2	\$39.40	2.03%	1	\$17.10	1.00%
9	Lidl	6	\$39.10	2.02%	6	\$37.40	2.19%
10	The Fresh Market	4	\$38.70	2.00%	4	\$35.70	2.09%
		115	\$1,900.50	98.03%	111	\$1,687.30	98.81%

The chart above 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.

Total supermarket sales for the area are \$1.94 billion.

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

Source: Food World, June 2021

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Richmond Market Leaders:

Walmart Extends Lead Over Kroger; Food Lion, Wawa Post Solid Comp Store Revenue Gains

- Alts.' Share Drops To 51.5%
- WM Extends Leader Over Kroger
- Wawa Jumps To #3 In Market
- WM, Target Now Control 20.7%
- CVS Remains Leading Drug Chain

Rank	Company	2021 Stores	2021 Sales (in millions)	% of 2021 Market	2020 Stores	2020 Sales (in millions)	% of 2020 Market
1	Walmart (SC/Neighborhood Mkt)	18	\$678.70	16.54%	18	\$634.40	16.91%
2	Kroger (Marketplace)	18	\$639.00	15.58%	18	\$602.70	16.07%
3	Food Lion	48	\$590.90	14.40%	48	\$531.00	14.16%
4	Wawa	32	\$289.03	7.05%	32	\$239.75	6.39%
5	CVS	58	\$263.00	6.41%	60	\$258.80	6.90%
6	Publix	16	\$243.40	5.93%	13	\$176.80	4.71%
7	Walgreens	37	\$212.20	5.17%	38	\$208.80	5.57%
8	Target	12	\$168.60	4.11%	12	\$150.30	4.01%
9	7-Eleven	76	\$149.60	3.65%	76	\$142.90	3.81%
10	Wegmans	2	\$128.60	3.13%	2	\$119.70	3.19%
11	Sam's Club	3	\$100.90	2.46%	3	\$90.40	2.41%
12	Costco	2	\$91.00	2.22%	2	\$82.70	2.20%
13	Aldi	11	\$80.80	1.97%	11	\$72.40	1.93%
14	BJ's Wholesale Club	2	\$76.80	1.87%	2	\$68.80	1.83%
15	International Markets	6	\$56.00	1.37%	6	\$52.70	1.41%
16	Whole Foods	2	\$44.60	1.09%	2	\$41.80	1.11%
17	Fas-Marts	27	\$42.70	1.04%	26	\$35.70	0.95%
18	Trader Joe's	2	\$39.40	0.96%	1	\$17.10	0.46%
19	Lidl	6	\$39.10	0.95%	6	\$37.40	1.00%
20	Sheetz	11	\$39.00	0.95%	11	\$37.20	0.99%
		389	\$3,973.33	96.86%	387	\$3,601.35	96.02%

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, Kmart, Target and Walmart are extrapolated to include comparable categories, as explained in the formula on page 99. 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: \$4.1 billion.** Source: Food World, June 2021

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GREAT BALLS OF FIRE

By Duke Winston

Walmart Extends Lead In Richmond; Food Lion Remains King Of Tidewater

When 19 of the top 20 top retailers in the Richmond and Tidewater markets all post same store sales increases (the six military commissaries in the region were the exception), the question then becomes: which retailers' volume increased the most? The top three gainers during the unprecedented events that occurred over the past 12 months were Walmart, Food Lion and convenience store chain Wawa.

Walmart's additional revenue was fueled by the ramping up of its e-commerce platform. Food Lion's performance was primarily accelerated the old-fashioned way with customers visiting its stores and increasing their purchases during the height of the pandemic. Additional business was also achieved by Food Lion's very good in-stock conditions. And, Wawa was clearly the c-store of choice (based on sales-per-store) for many consumers who desired convenience during the unparalleled events of the past year. Wawa also opened two new stores in the Tidewater region.

So, once again here's Big Duke's take on the Richmond-Tidewater operators and how those operators fared over the past 12 months.

Walmart – Despite another year of no new physical Walmart stores opening in the market, the Bentonville Behemoth did make progress, primarily through the acceleration and versatility of its e-commerce platforms which this year added another new wrinkle – Walmart+. The world's largest retailer could have done a lot more business at its stores during the early months of the pandemic but labor shortages and particularly below industry average in-store service levels cost them additional sales. A good year overall that could have been even better, Walmart is continually moving the needle forward towards the future with its upgraded omnichannel investments.

Kroger – We saw some signs of a slight downturn in 2019 as store conditions were not as crisp in previous years coupled with the fact that despite Publix's mediocre entry into the Richmond market, the Lakeland, FL-based chain impacted Kroger more than any other merchant in the market. The sales tailwinds created by the pandemic masked some of Kroger's slippage and indeed the country's largest pure-play supermarket chain performed well during COVID-19. Kroger, not unlike Walmart and a few other major retail players, is investing much more heavily in e-commerce than bricks and mortar and it reaped significant benefits from that spending shift. Now, with its first few Ocado fulfillment centers operational, Kroger's Richmond and Tidewater business will

See **GREAT BALLS** on page 94

IN REVIEW: KROGER

State	County	2021 Stores	2021 Sales (in millions)	2021 County Food Sales	% of 2021 County Market	2020 Stores	2020 Sales (in millions)	% of 2020 County Market
VA	Albemarle	3	\$138.40	\$641.70	21.57%	3	\$121.30	20.92%
VA	Chesapeake City	4	\$121.20	\$883.10	13.72%	4	\$106.50	12.98%
VA	Chesterfield	7	\$257.50	\$1,443.60	17.84%	7	\$243.40	18.72%
VA	Gloucester	1	\$20.60	\$122.40	16.83%	1	\$18.70	16.56%
VA	Hampton/Newport News (Marketplace)	1	\$31.80	\$1,121.80	2.83%	1	\$28.10	2.68%
VA	Hanover	2	\$98.10	\$460.90	21.28%	2	\$83.70	19.73%
VA	Henrico	9	\$283.40	\$1,905.30	14.87%	9	\$275.60	15.69%
VA	Isle Of Wight	1	\$27.40	\$89.30	30.68%	1	\$24.00	29.16%
VA	Portsmouth City (Marketplace)	1	\$40.90	\$273.50	14.95%	1	\$35.10	12.58%
VA	Suffolk City (Marketplace)	2	\$71.80	\$303.80	23.63%	2	\$62.30	22.43%
VA	Virginia Beach (Marketplace)	5	\$149.60	\$1,654.60	9.04%	5	\$130.70	8.72%
VA	York	2	\$43.00	\$179.80	23.92%	2	\$37.80	23.09%

VA Recap: 38 stores with sales of \$1.28 billion. Total retail food sales for VA in the study: \$23.57 billion. Kroger share of VA is 5.46%.

Mid-Atlantic Recap: 38 stores with sales of \$1.28 billion annually. Mid-Atlantic retail food sales total: \$54.9 billion.

Kroger Per Store Average: \$33.78 million

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

Source: *Food World*, June 2021

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Richmond-Norfolk Supermarket Leaders:

Food Lion, Kroger Combine To Control 61.5% Of Supermarket Business In Diversified Market

- Food Lion Dominates At 37.2%
- Kroger's #2 Slot Remains Firm
- Pandemic Helps HT Comps
- Per-Store Avg. Leader: Wegmans
- Publix Adds 3 New Supermarkets

Rank	Company	2021 Stores	2021 Sales (in millions)	% of 2021 Market	2020 Stores	2020 Sales (in millions)	% of 2020 Market
1	Food Lion	153	\$1,968.10	37.21%	153	\$1,742.50	36.49%
2	Kroger (Marketplace)	38	\$1,283.70	24.27%	38	\$1,167.20	24.44%
3	Harris Teeter	25	\$614.90	11.62%	25	\$540.90	11.33%
4	Wegmans	4	\$268.40	5.07%	4	\$247.40	5.18%
5	Publix	17	\$256.60	4.85%	14	\$190.10	3.98%
6	Aldi	28	\$212.40	4.02%	28	\$195.10	4.09%
7	Whole Foods	5	\$146.70	2.77%	5	\$135.60	2.84%
8	Lidl	16	\$114.80	2.17%	16	\$108.70	2.28%
9	Trader Joe's	6	\$113.20	2.14%	5	\$83.70	1.75%
10	Fresh Market	9	\$105.50	1.99%	9	\$97.20	2.04%
		301	\$5,084.30	96.12%	297	\$4,508.40	94.41%

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. **Total supermarket sales for the area are \$5.29 billion.** Source: *Food World*, June 2021

Richmond-Norfolk Market Leaders:

Food Lion, Walmart, Kroger Dominate \$11.2 Billion All-Channel Combo Marketing Area

- Alts. Share Grows To 49.9%
- FL, WM, Kroger Control 45.5%
- 7-Eleven Remains C-Store Leader
- Mass Merchants Capture 19.5%
- CVS At Top Of Drug Channel

Rank	Company	2021 Stores	2021 Sales (in millions)	% of 2021 Market	2020 Stores	2020 Sales (in millions)	% of 2020 Market
1	Food Lion	153	\$1,968.10	17.53%	153	\$1,742.50	16.82%
2	Walmart (SC/Neighborhood Mkt)	54	\$1,860.80	16.57%	54	\$1,725.00	16.65%
3	Kroger (Marketplace)	38	\$1,283.70	11.43%	38	\$1,167.20	11.27%
4	7-Eleven	385	\$774.80	6.90%	381	\$722.20	6.97%
5	Harris Teeter	25	\$614.90	5.48%	25	\$540.90	5.22%
6	CVS	120	\$564.70	5.03%	122	\$546.80	5.28%
7	Wawa	66	\$481.37	4.29%	64	\$417.75	4.03%
8	Walgreens	89	\$473.60	4.24%	92	\$465.50	4.49%
9	Target	25	\$330.00	2.94%	25	\$295.90	2.86%
10	Sam's Club	8	\$274.80	2.45%	8	\$246.50	2.38%
11	Wegmans	4	\$268.40	2.39%	4	\$247.40	2.39%
12	Publix	17	\$256.60	2.29%	14	\$190.10	1.83%
13	Rite Aid	68	\$227.00	2.02%	71	\$225.30	2.17%
14	BJ's Wholesale Club	6	\$213.50	1.90%	6	\$191.40	1.85%
15	Aldi	28	\$212.40	1.89%	28	\$195.10	1.88%
16	Costco	5	\$209.80	1.87%	5	\$190.90	1.84%
17	Military Commissaries	6	\$191.07	1.70%	6	\$223.66	2.16%
18	Whole Foods	5	\$146.70	1.30%	5	\$135.60	1.31%
19	Lidl	16	\$114.80	1.02%	16	\$108.70	1.05%
20	Trader Joe's	6	\$113.20	1.01%	5	\$83.70	0.81%
		1,124	\$10,530.24	93.79%	1,122	\$9,662.11	93.25%

Chart lists the top 20 retailers in the Richmond-Norfolk 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, Kmart, Target and Walmart are extrapolated to include comparable categories, as explained in the formula on page 99. Petroleum sales are not included. 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. **Total food sales for the area are \$11.23 billion.** Source: *Food World*, June 2021



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GREAT BALLS OF FIRE

from page 90

also benefit in the near future from having a grocery delivery option available to them not directly connected to any of its physical stores. Like Walmart, extremely well-positioned for the future.

Food Lion – The Ahold Delhaize USA “little engine” continued to perform well during the pandemic, aided by its many convenient locations, and as mentioned above, much better than industry average service levels. The reshaping really began five years ago after the merger between Ahold and Delhaize. Stores in both Richmond and Tidewater were remodeled and totally refreshed. The key to the transformation was that Food Lion understood its customers and knew they were loyal, but wanted improvements. Those upgrades were made, additional adjustments were executed and the results continue to be productive. There is clearly a place for a conventional supermarket chain with 30,000 SF stores which typically do \$200-300K weekly. Creating a more balanced omnichannel presence for all of its “brands” as Ahold Delhaize CEO Frans Muller desires is certainly a bigger challenge for Food Lion than for the global chain’s other units, but for now Food Lion continues to be that “little engine”... that can.

Harris Teeter – Harris Teeter knows its customers very well and they return their appreciation with a strong sense of loyalty. The upscale merchant, which has been owned by Kroger since 2014, performed very well during the most challenging parts of the pandemic and continued to post solid sales gains during the 12-month measuring period of our study. A large part of HT’s success can be attributed to consistently strong store conditions, unique product mix and a veteran and talented management team led by president Rod Antolock.

Publix – One of the very few retailers in the entire Richmond-Tidewater market to open any stores during the past year, Publix, in fact, opened three new supermarkets – two in Chesterfield County and one in the city of Richmond. Sales during the pandemic were good and the most profitable supermarket chain in America did improve its merchandising and product mix to a small degree. However, Big Duke believes that Publix has the potential to offer a lot more than a clean, service-oriented cookie cutter supermarket in an overcrowded market.

Aldi – Aldi will continue to be a factor in Richmond and Tidewater for many years. Clearly a much better run operation than newish Virginia rival Lidl (although the two German chains have been fighting the extreme value battle in Europe for decades), Aldi fared well during the pandemic, especially in keeping its in-store service levels at a higher rate than most of its industry competitors. As Big Duke has previously stated: Aldi has an all-world discount game: strong retails, excellent private label quality and differentiation and a very loyal customer base.



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FOOD WORLD MARKET STUDY: RULES & ANALYSIS

from page 19

produced strong comps, aided by high service levels during the early months of the pandemic. The seven Acme Markets and three Safeway stores (now operating as part of Albertsons' newly formed Mid-Atlantic division) also experienced excellent same store sales, again partially driven by having among the best in-stock conditions of all retailers in the entire study. As it's been for more than a decade, the Eastern Shore's movement on new stores and closed stores was minimal. Third place Giant Food closed a store; and the beleaguered discounter Save A Lot closed three units. Opening new stores were Aldi (one new store) and regional c-store chain Royal Farms (one new store). Although there is some modest population growth on the Eastern Shore, because the \$2.58 billion market remains overstored, don't expect any dramatic changes soon.

Central Pennsylvania

Of all the markets that we cover in the Mid-Atlantic, Northeast and parts of the Southeast, no retailer dominates its "backyard" like The Giant Company (TGC). The Carlisle, PA brand of Ahold Delhaize USA (formerly known as Giant/Martin's), again posted strong numbers in the competitive market where grocery sales reached a record \$6.65 billion. Part of TGC's success in the eight-county region has been its acquisition strategy in recent years, purchasing independent grocers and shuttered chain stores. The retailer was also helped by its investments in e-commerce which has helped the regional chain become more of a balanced omnichannel operator. Remaining in second place and enjoying a very solid year was Weis Markets which took advantage of comparable strong in-stock conditions, especially in the early months of COVID-19. While many retailers over the past five years have greatly reduced or eliminated adding new stores to their portfolios (opting instead to invest in remodels or relocations of existing stores), the pandemic made expanding their

store bases almost non-existent. Obviously, TGC was an exception to the rule as were c-store leader Sheetz, which added three new units, and extreme value pace-maker Aldi which added one new discount store. In Central PA, the story remains the same: with a 21 percent share of market lead, The Giant Company continues to rule the roost.

Richmond

Still the most competitive market in our coverage area, Richmond continues to be a three-horse battle (Walmart, Kroger and Food Lion) with more than a dozen other retailers vying for an increased slice of the pie. Market leader Walmart actually increased its share when compared to Kroger, but Food Lion continued to show some spunk by achieving another year of solid comp store growth and market share gains. The "big three" combined to capture 46.52 percent of the \$4.15 billion market which encompasses eight counties and the city of Richmond. Also making progress this year was Publix which first entered the market in 2017. The nation's most profitable grocery chain added three new stores over the past 12 months and increased its market share from 4.71 percent to 5.93 percent. While all retailers in our "top 20" increased their sales, those merchants that substantially increased their share of market (not counting Food Lion or Publix) included Wawa and Trader Joe's which opened a new store in the Stony Point section of Richmond last August.

Tidewater

The market's two leading retailers – Food Lion and Walmart – extended their dominance in another extremely overstored and competitive market. Food Lion, with 81 stores in the \$5.79 billion region, gained more than a point in market share and while Walmart's share growth was smaller (0.13 percent), the world's largest retailer continued to produce dynamic extrapolated grocery sales of more than \$32 million per store. 7-Eleven, with 284 stores in the Hampton Roads market, ranked third among all

retailers and was bunched closely with two Kroger-owned banners, Harris Teeter and Kroger. Because of the challenges that retailers faced in dealing with pandemic-related issues coupled with the general overstoring of the region, stores openings were few. C-store merchants 7-Eleven added four stores and high volume Wawa opened two new units. Conversely, Walgreens closed two drug stores, and the five military commissaries in the 10 cities and counties that comprise the Tidewater market continued its decline, amassing annual sales of \$161.4 million, a decrease of more than \$32 million over their 2020 volume. As recently as five years ago, those five commissaries garnered revenue of \$225 million.

How We Do It?

This is the 43rd 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, 2020 through March 31, 2021.

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

PriceRite), military commissaries, Kmart, Walmart and Target.

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

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

For the c-stores, clubs, drug chains and mass merchandisers, our success rate is about 80 percent. Sales data for military commissaries is publicly available.

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

Because of record level grocery and HBC/GM sales that virtually all retailers achieved during our 12-month measuring period this year, we have adjusted the extrapolated sales in those areas that mass merchants and club stores amassed.

Based on publicly-available data from Walmart (Sam's Club), Target, Costco and BJ's, whose sales breakouts by department skewed and continues to skew more heavily toward grocery and HBC, we have raised that percentage from 60 to 62 percent at Walmart's 95 SuperCenters in the region. For the 66 conventional Walmart ("Division One") discount stores remaining in the market, we have increased the extrapolated percentage of grocery and HBC from 45 to 47 percent of total store sales. We continue to include 100 percent of Walmart's Neighborhood store sales.

At Target, that food/drug percentage has been increased from 44 to 46 percent and for the three

Super Target stores in Northern Virginia we have elevated the extrapolation from 52 to 54 percent.

The three club operators - Costco, BJ's and Sam's Club - also experienced highly skewed sales towards grocery and HBC/GM. Their percentage of grocery and HBC also increased during the COVID-19 pandemic and we have increased their totals (as a percent of overall sales) from 65 to 67 percent.

And while 100 percent of all conventional Kroger stores sales are included, that ratio is 67 percent (up from 65 percent last year) when measuring volume at the Kroger's seven Marketplace Foods in the region.

One more "rules" reminder: in 2016, Target sold its in-store pharmacies to CVS. For the purposes of this study, we continue to tally both Target and CVS as separate entries in our store count totals although both banners operate from the same physical location.

If a store opened during the course of the year (but was not open for all 52 weeks) we annualize volumes based on a weekly average. For new replacement stores we apply a "blended" formula combining old store sales with new volumes achieved at the replacement. If a store closed during our measuring period, it is eliminated from our survey and no sales from that shuttered unit are included.

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

Our cast includes Terri Maloney, VP-editorial director; Maria Maggio, VP-general manager of *Food Trade News*; Kevin Gallagher, VP-Metro New York and New England; Karen Fernandez, director of marketing/digital strategist; and Beth Pripstein, office and cir-

See **RULES & ANALYSIS**
on page 106



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TAKING STOCK

from page 60

our customers what they want, when they want it, 24/7/365 – that includes accepting many forms of payment. We're very excited to be working with Flexa to roll out support for cryptocurrencies and other types of digital assets at our stores," said Linda Smith, payments manager for Sheetz...I attended the opening of the newest Mid-Atlantic Lidl unit in Columbia, MD earlier this month and was particularly impressed with the staff who were well-trained and extraordinarily courteous. I still don't like the idea of grocery stores inhabiting space in malls (the new store encompasses part of the closed Sears store in the Columbia Mall) and Lidl still has to prove it can maintain its sales momentum beyond the opening few weeks...two former Price Rite stores will soon have new ethnic/specialty operators. Fresh World, which operates four other stores in Northern Virginia, will take over the 52,000 square foot space in Woodbridge, VA that was once occupied by the discount division of Wakefern. That store closed in 2019. And just before press-time we learned that Global Food, which currently operates six other stores in our region - two in Maryland and four in Northern VA - will fill the 36,000 square foot space that once housed a Price Rite in the Woodlawn section of Baltimore County (Security Boulevard). Price Rite closed that location last September. We earlier reported that Price Rite is exploring sales options for its four remaining stores in Maryland - Rosedale, Baltimore City (W. Pratt Street), District Heights and Hyattsville...unfortunately, we have a fresh crop of deaths to report. On a personal note, I was deeply saddened by the passing of Ben Sigman, co-owner of B. Green & Co., who left us too soon at the age of 76. I first met Ben more than 40 years ago and you couldn't help but be immediately impressed by his intellect and his genuine kindness. Ben treated everyone with respect and was especially proud to be a member of the B. Green family which has been involved in the grocery industry since 1915. I know the pandemic has created kind of a time warp, but it seems

TAKING STOCK continues on page 117

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Harris Teeter



Retailers Post Record Sales; Giant, Walmart, CVS, Food Lion, Albertsons Lead Pack

from page 1

Delhaize USA (ADUSA) brand added one net new store to its portfolio bringing its total to 159 units. In other company news, Giant also ratified a new four-year contract with UFCW Locals 27 and 400 (in March 2020) and also (with the help of those two unions) created a new pension plan for its store level associates.

Ranking second again this year was Walmart, where increased revenue was greatly aided by continued investment in e-commerce. The Bentonville Behemoth expanded its curbside service, added dozens of micro-fulfillments center (attached to its stores) and expanded its home delivery options, partially by launching a new e-commerce unit, Walmart+. Extrapolated food and drug sales in the region are estimated at \$5.43 billion, up from \$5.02 billion last year. And for the third consecutive year, Walmart did not open any new brick and mortar stores in the Mid-Atlantic.

CVS, the largest drug chain in the region, retained its third-place ranking in the market. Our research indicated that the sales increases that drug chains (and c-stores) experienced was substantially less than supermarkets, mass merchants and club stores. The Woonsocket, RI-based drug merchant added seven new stores during the past 12 months, giving CVS 646 drug stores in the market. Annual sales for the big drug chain are estimated at \$3.56 billion.

Once again, Food Lion proved that its re-engineered model ("Easy, Fresh & Affordable") continues to pay dividends. In fact, of all the ADUSA brands, Food Lion performed the best. Part of the reason is that all of its 254 stores in the Mid-Atlantic underwent a refurbishment in recent years. Another key reason for Food Lion's success during the pandemic: its ability to keep product in-stock during the worst of the supply chain gridlock was a key component to their volume increases. Estimated sales for the year were \$3.23 billion.

Moving up a notch this year was Albertsons/Safeway, which became part of the parent firm's Mid-Atlantic division when Safeway and Acme Markets joined forces in September 2020. Safeway's headquarter operations were shifted from Lan-

ham, MD to Malvern, PA (Acme's offices) and distribution was also moved from Safeway's warehouse in Upper Marlboro, MD to a mechanized facility in Denver, PA (which had been serving Acme's stores but was still underutilized). In the new alignment, former Safeway-eastern president Tom Lofland became senior VP-merchandising and marketing and Jim Perkins, who was Acme's president, remained in place with newly expanded duties. Earlier this year, Albertsons also acquired 27 Kings and Balducci's stores of which Balducci's operated four stores in this market. Because of excellent in-stock conditions during the height of the pandemic, Albertsons/Safeway enjoyed some of the strongest comp sales of any retailer in the survey. Sales this year increased to \$3.0 billion for its 122 stores, up from last year's volume of \$2.37 billion with 110 stores (please note: the store counts and sales of Safeway, Acme and Balducci's have been rolled into the overall Albertsons Mid-Atlantic division's volume for the region).

It was another strong year for ADUSA's The Giant Company's brand. The Carlisle, PA-based merchant, which over the past 18 months has targeted its growth in Philadelphia, produced annual sales of \$2.75 billion (vs. \$2.40 billion last year) at its 62 stores, three more than last year. The three new stores all opened last year and included two new former Musser's Markets stores in Lancaster County and a former Weis store in Swatara Twp. (Dauphin County). The company currently operates 51 Giant stores in Central PA; six Martin's stores in Maryland; and five Martin's stores in Virginia. The non-union operator also gained momentum over the past 12 months by elevating its e-commerce business.

Harris Teeter maintained its seventh-place position in the Mid-Atlantic region. The Matthews, NC-based Kroger subsidiary benefited from the tailwinds of pandemic-related sales. Sales at its 78 stores are estimated at \$2.36 billion, a gain of \$337 million from last year.

Convenience store juggernaut 7-Eleven, which operated more physical stores than any other retailer in the region (1,142), also paced all c-store operators in sales. We estimated that revenue for the Dallas, TX-based firm, which is

owned by Japanese company Seven & i Holdings, grew to \$2.17 billion over the past 12 months. 7-Eleven operates both corporate-owned and franchised stores in the Mid-Atlantic.

Wegmans remained the highest per-store average supermarket retailer in the region, but its increases were not at the same level as many of its competitors primarily due to the fact that it was forced to close or restrict access to many of its multiple service bars and other prepared foods departments in its stores. Always a key contributor and major differentiator, the need to shutter/restrict those departments in order to obey health and safety protocols certainly put a dent in Wegmans' potential to grab greater sales during the past year. Some of those areas have since been reopened or reimagined. Wegmans also pulled the plug on a store it expected to open next year in Arcola, VA (Loudoun County) due to concerns about that store cannibalizing sales from other existing Wegmans units in the market. Still, it was a solid year for the Rochester, NY uber-retailer with estimated revenue rising to \$1.97 billion for its 23 stores, one more than last year (it opened a new unit in Tysons Corner, VA in November 2020). Other new Mid-Atlantic units are slated for Rockville, MD; Alexandria, VA; Reston, VA; Greenville, DE; and Washington, DC.

Maintaining a hold on the 10th position in the region are the rapidly growing "International Markets" (specialty and ethnic supermarkets that are at least 20,000 square feet in size are grouped together in this survey). As the area's Latino and Asian population continues to grow, we estimate that there are now 131 ethnic markets in region. Collectively, those stores rang up approximately \$1.89 billion in sales, a revenue gain of \$152 million over 2020. Our research also found that even during the pandemic, consumers who shop at ethnic or specialty stores utilized e-commerce to a lesser extent than what we witnessed at more traditional supermarkets.

Other retailers that topped the \$1 billion mark in annual sales in the 89-county region included: Target with 110 stores and an estimated extrapolated annual volume of \$1.85 billion; Weis Markets with 97 stores and annual revenue of \$1.83

billion; Walgreens - 327 stores and \$1.77 billion in estimated annual sales; Costco - 30 stores, estimated extrapolated annual sales of \$1.74 billion; Kroger, which operated 38 stores in the Mid-Atlantic and garnered estimated annual sales of \$1.28 billion; Whole Foods, whose 32 natural and organic stores (two more than last year), amassed an estimated annual revenue of \$1.2 billion; regional convenience store power Wawa, whose 169 c-stores rang up annual sales of \$1.15 billion; BJ's Wholesale Club - 29 stores with estimated extrapolated annual sales of \$1.05 billion; fast-rising Aldi with 128 stores (eight more than in last year) and estimated annual revenue of \$1.03 billion; and Sam's Club, which operates 26 club units in the Mid-Atlantic region, good for an extrapolated annual value estimate of \$1.02 billion.

By class of trade, the leaders are: supermarkets - Giant Food (Lanover) - (159 stores, \$6.1 billion in sales); clubs - Costco (30 stores, \$1.74 billion in extrapolated sales); mass - Walmart (161 stores, \$5.43 billion in extrapolated sales); drug - CVS (646 stores and \$3.56 billion in estimated sales); and convenience stores - 7-Eleven (1,142 stores and an estimated \$2.17 billion in revenue). Additionally, the 20 military commissaries rang up annual sales of \$582.9 million, a significant drop from last year's annual revenue of \$607 million, continuing a declining trend of military commissary sales that has occurred over the past decade.

Viewed as a group, the 48 corporate chains in the market operated 5,114 stores and accrued \$53.7 billion in annual sales, good for 97.73 percent of the Mid-Atlantic region's \$54.9 billion food and drug market.

Among all independent retailers (those operating between two and 18 stores), Baltimore-based B. Green led the pack with 11 stores that amassed annual sales of \$217.7 million.

Karns Prime & Fancy Foods ranked second among all independent retailers in the region. The family-owned independent, based in Mechanicsburg, PA, now operates nine stores, which did \$171 million in sales last year.

Another Central PA-based retail marketing group, Family Owned Markets, which now oversees eight supermarkets, compiled an aggregate volume of \$153.6 million over

the past 12 months. Up-and-comer Streets Market, based in Washington, DC, added two new units this year and produced estimated annual revenue of \$90 million.

Other perennial Mid-Atlantic independents on the leaderboard included: McKay's (which acquired two former Shoppers stores); Graul's; Eddie's of Roland Park; Geresbeck's; and discount/closeout specialist Sharp Shopper.

As a combined group, the 13 multi-store independent retail organizations in the Mid-Atlantic operated 68 supermarkets which garnered estimated annual sales of \$951.1 million. Collectively, those stores controlled 1.73 percent of the region's food and drug revenue.

There were some industry changes to review as well. One new retailer entered the market this year - Compare Foods - which operates neighborhood stores in Metro New York and North Carolina. Compare acquired four former Shoppers stores (two in Baltimore and two in Prince George's County, MD) in 2020.

Personnel changes over the past 12 months include Karen Lynch replacing the retired Larry Merlo as CEO of parent firm CVS Health and Neela Montgomery being named president of its drug store division. At rival Walgreens Boots Alliance, former Sam's Club and Starbucks executive Rosalind Brewer was brought in as CEO replacing veteran Stefano Pessina who became executive chairman of the board. At BJ's, Bob Eddy was named chief executive following the untimely passing of Lee Delaney earlier this year. Chris Baldwin remains executive chairman. Lidl named Michal Lagunionek as its newest CEO-U.S., following the resignation of Johannes Fieber. Lagunionek becomes the fourth U.S. chief executive since the German discounter announced it planned to open stores in this country in 2015.

Additionally, as mentioned earlier, Albertsons rolled up its Safeway-Eastern and Acme Markets divisions into its newly combined Mid-Atlantic unit which now encompasses both chains as well as the Kings and Balducci's banners. The new unit oversees more than 300 stores and nearly \$7 billion in annual sales.

Tidewater Supermarket Leaders:

Food Lion, Harris Teeter And Sister Firm Kroger Lead All Supers In Competitive Hampton Roads

- FL Extends Tidewater Lead
- HT Solid With 20.3% Share
- Kroger Comps Aided By Pandemic
- Aldi, Lidl Now Control 7.8%
- Wegmans' 1 Unit Makes Impact

Rank	Company	2021 Stores	2021 Sales (in millions)	% of 2021 Market	2020 Stores	2020 Sales (in millions)	% of 2020 Market
1	Food Lion	81	\$1,101.60	41.28%	81	\$966.00	39.92%
2	Harris Teeter	22	\$541.20	20.28%	22	\$475.70	19.66%
3	Kroger (Marketplace)	17	\$506.30	18.97%	17	\$443.20	18.32%
4	Aldi	17	\$131.60	4.93%	17	\$122.70	5.07%
5	Lidl	10	\$75.70	2.84%	10	\$71.30	2.95%
6	Wegmans	1	\$68.40	2.56%	1	\$63.50	2.62%
7	The Fresh Market	5	\$66.80	2.50%	5	\$61.50	2.54%
8	Whole Foods	2	\$66.50	2.49%	2	\$60.60	2.50%
9	Trader Joe's	3	\$52.50	1.97%	3	\$47.70	1.97%
10	International Markets	3	\$40.00	1.50%	3	\$38.20	1.58%
		161	\$2,650.60	99.31%	161	\$2,350.40	97.14%

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. **Total supermarket sales for the area are \$2.67 billion.** Source: Food World, June 2021

Tidewater Market Leaders:

Food Lion, Walmart Continue To Set Pace In \$5.8B Overstored Mkt.; Commissary Sales Dip Again

- Alts. Share Grows To 52.1%
- Food Lion Ups Share, Remains #1
- E-Commerce Efforts Aid WM
- 7-Eleven Dominates C-Stores
- Commissary Volume Drops Again

Rank	Company	2021 Stores	2021 Sales (in millions)	% of 2021 Market	2020 Stores	2020 Sales (in millions)	% of 2020 Market
1	Food Lion	81	\$1,101.60	19.03%	81	\$966.00	17.94%
2	Walmart (SC/Neighborhood Mkt)	29	\$934.50	16.14%	29	\$862.10	16.01%
3	7-Eleven	284	\$571.40	9.87%	280	\$529.10	9.83%
4	Harris Teeter	22	\$541.20	9.35%	22	\$475.70	8.83%
5	Kroger (Marketplace)	17	\$506.30	8.74%	17	\$443.20	8.23%
6	CVS	47	\$238.40	4.12%	47	\$228.00	4.23%
7	Walgreens	42	\$213.10	3.68%	44	\$210.50	3.91%
8	Rite Aid	58	\$193.10	3.34%	58	\$184.10	3.42%
9	Wawa	34	\$192.34	3.32%	32	\$178.00	3.31%
10	Military Commissaries	5	\$161.37	2.79%	5	\$194.18	3.61%
11	Sam's Club	4	\$148.60	2.57%	4	\$133.30	2.48%
12	Target	12	\$147.20	2.54%	12	\$133.10	2.47%
13	BJ's Wholesale Club	4	\$136.70	2.36%	4	\$122.60	2.28%
14	Aldi	17	\$131.60	2.23%	17	\$122.70	2.28%
15	Costco	2	\$81.20	1.40%	2	\$73.50	1.37%
16	Lidl	10	\$75.70	1.31%	10	\$71.30	1.32%
17	Wegmans	1	\$68.40	1.18%	1	\$63.50	1.18%
18	The Fresh Market	5	\$66.80	1.15%	5	\$61.50	1.14%
19	Whole Foods	2	\$66.50	1.15%	2	\$60.60	1.13%
20	Trader Joe's	3	\$52.50	0.96%	3	\$47.70	0.89%
		679	\$5,678.51	98.07%	675	\$5,160.68	95.85%

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, Kmart, Target and Walmart are extrapolated to include comparable categories, as explained in the formula on page 99. Petroleum sales are not included. Counties/cities included are: Chesapeake City, Gloucester, Hampton/Newport News City, Isle of Wight, James City, Norfolk, Portsmouth City, Suffolk City, Virginia Beach City and York. **Total food sales for the area are \$5.79 billion.** Source: Food World, June 2021



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PER STORE AVERAGES: 2021

Rank	Company	Stores	2021 Sales (in millions)	Per Store Avg. (in millions)
1	Wegmans	23	\$1,969.80	\$85.64
2	Costco*	30	\$1,739.40	\$57.98
3	The Giant Company (Martin's)	62	\$2,574.89	\$44.43
4	Whole Foods	32	\$1,242.90	\$38.84
5	Giant Food	159	\$6,097.76	\$38.85
6	Sam's Club*	26	\$970.10	\$37.31
7	BJ's Wholesale Club*	29	\$1,045.70	\$36.06
8	Kroger (Marketplace)	38	\$1,283.70	\$33.78
9	Walmart (SC/Neighborhood Mkt)*	161	\$5,430.00	\$33.73
10	Harris Teeter	78	\$2,631.00	\$30.27

() 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 99.

Source: *Food World*, June 2021

PEOPLE

from page 20

of in-depth industry knowledge and strategic expertise. She has a track record of significantly increasing business for her clients and customers year after year.

"We are thrilled to welcome Dana to our team," said Kevin Shea, EVP. "She has had incredible success in the industry and I'm excited to see what we're able to do together with our clients and customers."

Also joining JOH is **Erica Rancatore**, who will serve as an account executive/account manager in its Fresh Division.

Over the past 10 years, Rancatore has leveraged industry and consumer insights, analytics and competitive research to drive long-term profitable growth and brand equity for her clients.



Erica Rancatore

"Erica brings a phenomenal amount of experience with her as she takes on the role of account executive/account manager," said Chris Darmody, EVP, Fresh. "She is already proving to be an incredible asset to JOH's clients and customers. Welcome to the family!"



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WASHINGTON, DC SHARE OF MARKET: 2021



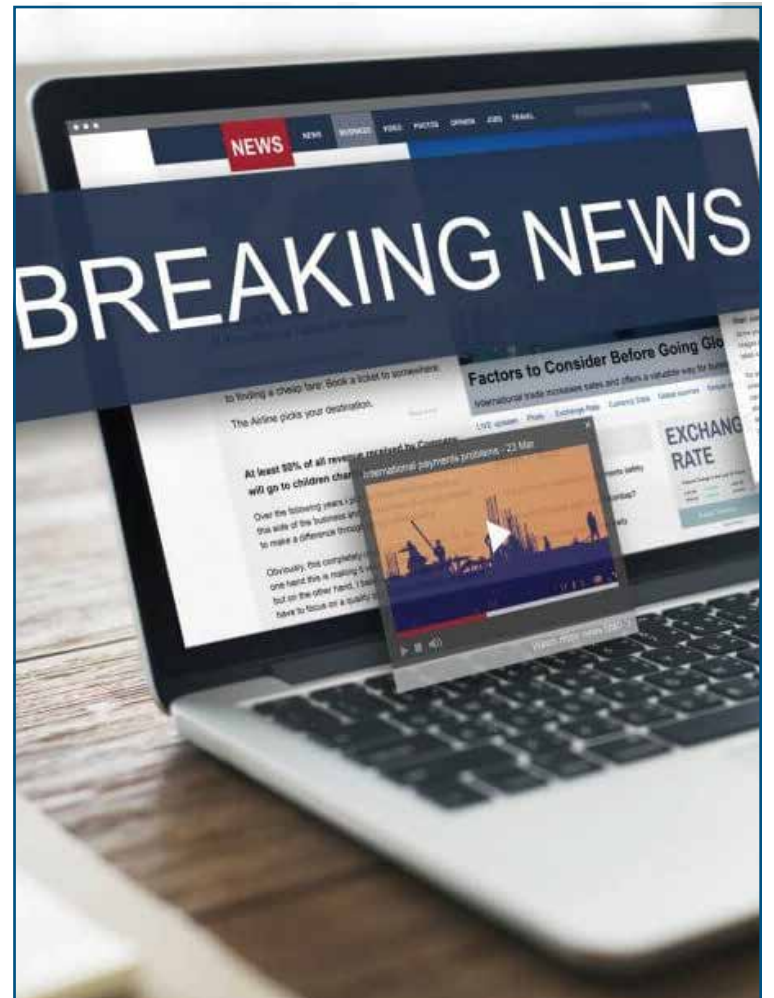
DISTRICT OF COLUMBIA (\$2.4 billion)

- Population 705,749
- # of households 284,386
- Median Median Income \$86,420
- Under age 18..... 17.9%
- Over age 65..... 12.1%
- Female 52.6%
- White 36.6%
- Black..... 46.3%
- Hispanic 11.0%
- Asian..... 4.0%

Rank	Company	Stores	Sales (in millions)	% of Market
1	CVS	64	\$508.60	21.06%
2	Albertsons (Safeway)	12	\$354.73	14.66%
3	Giant Food	7	\$282.40	12.22%
4	Whole Foods	6	\$256.50	11.70%
5	Harris Teeter	4	\$191.60	7.94%
6	Trader Joe's	5	\$136.30	5.66%
7	International Markets	11	\$127.60	5.28%
8	Walmart (SuperCenter)	3	\$99.70	4.13%
9	Target	5	\$87.20	3.61%
10	7-Eleven	47	\$82.10	3.40%
11	Costco	1	\$60.80	2.52%
12	Walgreens	8	\$53.70	2.22%
13	Streets Market	6	\$47.50	1.97%
14	Military Commissaries	1	\$17.74	0.73%
15	MOM's Organic Market	1	\$14.10	0.59%
16	Aldi	1	\$12.60	0.52%
17	Wawa	5	\$11.36	0.47%
		187	\$2,344.53	96.62%

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

Source: Food World, June 2021



RULES & ANALYSIS

from page 99
culation manager.

And of course, as I do each year at this time, I want to say thanks to my retired partner and friend, Dick Bestany. Many moons have passed since we left New England to attempt to create trade industry journals that focused on the “inside baseball” part of the business, particularly between retailers/wholesalers and the suppliers, distributors and brokers who call on them. Dick turned 82 in late May – a reality that I find difficult to grasp.

Once again, a special shout out to Terri Maloney. In her 20 years as editor, she has piloted the grueling Market Study process which includes data collection (which involves hundreds of changes each year), IT through-put, pre-press coordination, proofreading and printer communication.

There are also a number of other people who’ve contributed to this issue and to our overall

success that I want to thank.

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

Kudos, too, to our printer – Evergreen Printing in Bellmawr, NJ – another entrepreneurial business that prioritizes customer service and quality. We salute John Dreisbach, Mike McBain and Tanya Erickson for their continued good work.

This is my 48th year of reporting about the grocery industry. Wow, how times have changed over that span, especially during the past 15 months!

It’s been a remarkable time in our industry – challenging, frightening, and in a strange way, redeeming.

As stated earlier, the grocery business has truly shined and set the bar extremely high during

the most difficult period in its history. We’re not totally out of the woods yet, but the worst effects of the pandemic appear to be behind us.

From a business perspective, food retailers as a whole have held on to a lot of the revenue gains they’ve achieved over the past 15 months. Even recent Q1 sales results continue to show a positive trend.

A clearer report card will be able to be viewed by the end of 2021 when students return to schoolrooms and restaurants approach their 2019 traffic counts and sales.

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

Jeff Metzger

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**to our associates for
doing a great job
and continuing to
serve the community.**




IN REVIEW: ALDI

State	County	2021 Stores	2021 Sales (in millions)	2021 County Food Sales	% of 2021 County Market	2020 Stores	2020 Sales (in millions)	% of 2020 County Market
DC	Washington	1	\$12.60	\$2,414.60	0.52%	1	\$11.40	0.52%
DC Recap: 1 store with sales of \$12.6 million. Total retail food sales for DC in the study: \$2.41 billion. Aldi share of DC is 0.52%.								
DE	Kent	3	\$23.80	\$515.80	4.61%	2	\$15.20	3.26%
DE Recap: 3 stores with sales of \$23.8 million. Total retail food sales for DE in the study: \$1.48 billion. Aldi share of DE is 1.61%.								
MD	Anne Arundel	6	\$53.90	\$2,275.40	2.37%	5	\$40.30	1.98%
MD	Baltimore City	4	\$25.20	\$1,520.20	1.66%	4	\$23.40	1.71%
MD	Baltimore County	11	\$73.80	\$3,273.90	2.25%	11	\$67.40	2.30%
MD	Carroll	1	\$8.60	\$663.10	1.30%	1	\$7.70	1.29%
MD	Cecil	1	\$8.20	\$279.30	2.94%	1	\$7.40	2.94%
MD	Charles	1	\$9.20	\$516.30	1.78%	0	\$0.00	0.00%
MD	Frederick	2	\$22.50	\$907.30	2.48%	2	\$19.80	2.39%
MD	Harford	3	\$19.60	\$1,020.80	1.92%	3	\$18.30	1.97%
MD	Howard	1	\$11.90	\$1,175.20	1.01%	1	\$10.90	1.00%
MD	Montgomery	6	\$49.70	\$3,640.10	1.37%	5	\$38.20	1.12%
MD	Prince George's	11	\$88.20	\$3,085.20	2.86%	11	\$80.40	2.83%
MD	St. Mary's	1	\$7.50	\$396.70	1.89%	1	\$6.80	1.93%
MD	Talbot	1	\$7.90	\$217.10	3.64%	1	\$7.10	3.62%
MD	Washington	2	\$16.30	\$520.60	3.13%	1	\$6.80	1.47%
MD	Wicomico	1	\$10.60	\$279.40	3.79%	1	\$9.80	3.72%
MD Recap: 52 stores with sales of \$413.1 million. Total retail food sales for MD in the study: \$20.8 billion. Aldi share of MD is 1.99%.								
PA	Cumberland	4	\$35.40	\$1,138.40	3.11%	3	\$20.80	2.06%
PA	Dauphin	2	\$18.30	\$1,022.10	1.79%	2	\$17.80	1.92%
PA	Franklin	1	\$7.40	\$459.90	1.61%	1	\$7.00	1.69%
PA	Lancaster	4	\$32.40	\$1,740.00	1.86%	4	\$29.60	1.90%
PA	Lebanon	1	\$6.90	\$409.60	1.68%	1	\$6.20	1.63%
PA	York	3	\$25.30	\$1,569.30	1.61%	3	\$23.60	1.66%
PA Recap: 15 stores with sales of \$125.7 million. Total retail food sales for PA in the study: \$6.65 billion. Aldi share of PA is 1.89%.								
VA	Chesapeake City	3	\$17.70	\$883.51	2.00%	3	\$16.90	2.06%
VA	Chesterfield	4	\$30.20	\$1,443.60	2.09%	4	\$27.60	2.12%
VA	Culpeper	1	\$8.90	\$164.80	5.40%	1	\$8.40	5.98%
VA	Fairfax	13	\$122.40	\$5,331.40	2.30%	12	\$106.20	2.19%
VA	Frederick	1	\$7.90	\$496.30	1.59%	1	\$7.40	1.62%
VA	Gloucester	1	\$9.90	\$122.40	8.09%	1	\$9.10	8.06%
VA	Hampton/Newport News	3	\$24.30	\$1,121.80	2.17%	3	\$21.80	2.08%
VA	Hanover	1	\$8.10	\$460.90	1.76%	1	\$7.30	1.72%
VA	Henrico	6	\$42.50	\$1,905.30	2.23%	6	\$37.50	2.13%
VA	James City	1	\$7.90	\$409.60	1.93%	1	\$7.20	1.89%
VA	Loudoun	4	\$38.30	\$1,472.40	2.60%	3	\$24.60	1.78%
VA	Norfolk City	2	\$13.40	\$754.70	1.78%	2	\$12.50	1.74%
VA	Portsmouth City	1	\$8.10	\$273.50	2.96%	1	\$7.30	2.62%
VA	Prince William	5	\$35.80	\$1,856.40	1.93%	5	\$32.40	1.92%
VA	Spotsylvania	3	\$17.20	\$767.80	2.24%	3	\$15.90	2.29%
VA	Stafford	1	\$7.80	\$428.40	1.82%	1	\$7.20	1.97%
VA	Suffolk City	1	\$10.90	\$303.80	3.59%	1	\$9.80	3.53%
VA	Virginia Beach	5	\$39.40	\$1,654.60	2.38%	5	\$38.10	2.54%
VA	Warren	1	\$7.40	\$146.80	5.04%	1	\$6.90	4.92%

VA Recap: 57 stores with sales of \$458.1 million. Total retail food sales for VA in the study: \$23.56 billion. Aldi share of VA is 1.95%.

**Mid-Atlantic Recap: 128 stores with sales of \$1.03 billion annually. Mid-Atlantic retail food sales total: \$54.9 billion.
Aldi Per Store Average: \$8.07 million**

Source: *Food World*, June 2021



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IN REVIEW: WALGREENS

State	County	2021 Stores	2021 Sales (in millions)	2021 County Food Sales	% of 2021 County Market	2020 Stores	2020 Sales (in millions)	% of 2020 County Market
DC	Washington	8	\$53.70	\$2,414.60	2.22%	9	\$54.20	2.47%
DC Recap: 8 stores with sales of \$53.7 million. Total retail food sales for DC in the study: \$2.41 billion. Walgreens share of DC is 2.22%.								
DE	Kent	8	\$35.30	\$515.80	6.84%	8	\$33.40	7.16%
DE	Sussex	14	\$74.10	\$966.30	7.67%	14	\$71.00	8.21%
DE Recap: 22 stores with sales of \$109.4 million. Total retail food sales for DE in the study: \$1.48 billion. Walgreens share of DE is 7.38%.								
MD	Anne Arundel	16	\$60.20	\$2,275.40	2.65%	16	\$57.40	2.81%
MD	Baltimore City	19	\$127.90	\$1,520.20	8.41%	20	\$127.40	9.31%
MD	Baltimore County	26	\$149.50	\$3,273.90	4.57%	26	\$142.70	4.87%
MD	Calvert	2	\$11.10	\$387.30	2.87%	2	\$10.70	3.06%
MD	Caroline	1	\$5.50	\$82.20	6.69%	1	\$5.30	6.96%
MD	Carroll	4	\$18.90	\$663.10	2.85%	4	\$18.20	3.06%
MD	Cecil	3	\$12.70	\$279.30	4.55%	3	\$12.30	4.89%
MD	Charles	3	\$15.10	\$516.30	2.92%	3	\$14.60	3.25%
MD	Dorchester	1	\$5.20	\$56.70	9.17%	1	\$4.90	8.26%
MD	Frederick	5	\$25.30	\$907.30	2.79%	5	\$23.70	2.86%
MD	Harford	11	\$54.00	\$1,020.80	5.29%	11	\$51.70	5.56%
MD	Howard	5	\$26.60	\$1,175.20	2.26%	5	\$25.10	2.30%
MD	Kent	2	\$20.70	\$99.70	20.76%	2	\$19.90	20.77%
MD	Montgomery	13	\$72.30	\$3,640.10	1.99%	11	\$59.60	1.75%
MD	Prince George's	12	\$66.30	\$3,085.20	2.15%	12	\$63.40	2.24%
MD	Queen Anne's	2	\$12.10	\$136.80	8.85%	2	\$11.40	8.73%
MD	St. Mary's	3	\$14.50	\$396.70	3.66%	3	\$13.80	3.91%
MD	Talbot	1	\$4.80	\$217.10	2.21%	1	\$4.60	2.34%
MD	Washington	4	\$20.20	\$520.60	3.88%	4	\$19.30	4.18%
MD	Wicomico	2	\$10.20	\$279.40	3.65%	2	\$9.50	3.61%
MD	Worcester	1	\$6.10	\$230.70	2.64%	1	\$5.80	2.77%
MD Recap: 136 stores with sales of \$739.2 million. Total retail food sales for MD in the study: \$20.8 billion. Walgreens share of MD is 3.55%.								
PA	Franklin	1	\$5.40	\$459.90	1.17%	1	\$5.20	1.26%
PA	Lancaster	1	\$5.30	\$1,740.00	0.30%	1	\$5.10	0.33%
PA	York	3	\$16.30	\$1,569.30	1.04%	3	\$15.60	1.10%
PA Recap: 5 stores with sales of \$27.0 million. Total retail food sales for PA in the study: \$6.65 billion. Walgreens share of PA is 0.41%.								
VA	Accomack	1	\$5.20	\$96.90	5.37%	1	\$5.00	5.82%
VA	Albemarle	2	\$9.70	\$641.70	1.51%	2	\$9.40	1.62%
VA	Arlington	5	\$32.40	\$949.80	3.41%	5	\$33.70	3.98%
VA	Caroline	1	\$4.70	\$32.40	14.51%	1	\$4.40	14.72%
VA	Chesapeake City	6	\$25.60	\$883.10	2.90%	6	\$24.50	2.99%
VA	Chesterfield	10	\$60.10	\$1,443.60	4.16%	10	\$56.50	4.35%
VA	Culpeper	2	\$12.20	\$164.80	7.40%	1	\$5.70	4.06%
VA	Dinwiddie	2	\$10.50	\$131.10	8.01%	2	\$10.10	8.20%
VA	Essex	1	\$5.00	\$61.80	8.09%	1	\$4.80	8.35%
VA	Fairfax	24	\$133.20	\$5,331.40	2.50%	24	\$127.80	2.63%
VA	Fauquier	2	\$10.60	\$176.90	5.99%	2	\$10.10	6.07%
VA	Frederick	4	\$21.80	\$496.30	4.39%	3	\$15.50	3.39%
VA	Gloucester	1	\$5.20	\$122.40	4.25%	1	\$5.00	4.43%
VA	Hampton/Newport News	8	\$44.70	\$1,121.80	3.98%	9	\$45.20	4.31%
VA	Hanover	3	\$15.60	\$460.90	3.38%	3	\$15.30	3.61%
VA	Henrico	20	\$115.90	\$1,905.30	6.08%	21	\$117.20	6.67%
VA	James City	1	\$6.60	\$409.60	1.61%	1	\$6.20	1.63%
VA	Lancaster	1	\$5.50	\$79.50	6.92%	1	\$5.30	6.64%

IN REVIEW: WALGREENS

State	County	2021 Stores	2021 Sales (in millions)	2021 County Food Sales	% of 2021 County Market	2020 Stores	2020 Sales (in millions)	% of 2020 County Market
VA	Loudoun	10	\$50.60	\$1,472.40	3.44%	10	\$48.30	3.50%
VA	Louisa	1	\$5.10	\$48.10	10.60%	1	\$4.90	11.09%
VA	New Kent	2	\$10.10	\$51.80	19.50%	2	\$9.70	20.51%
VA	Norfolk City	5	\$30.70	\$754.70	4.07%	6	\$33.80	4.70%
VA	Northampton	1	\$4.40	\$36.80	11.96%	1	\$4.20	12.43%
VA	Northumberland	1	\$4.50	\$20.50	21.95%	1	\$4.30	22.87%
VA	Portsmouth City	2	\$11.60	\$273.50	4.24%	2	\$11.00	3.94%
VA	Prince George	1	\$4.60	\$84.90	5.42%	1	\$4.40	5.72%
VA	Prince William	9	\$55.10	\$1,856.40	2.97%	10	\$55.60	3.29%
VA	Richmond	1	\$4.30	\$21.90	19.63%	1	\$4.10	20.20%
VA	Shenandoah	2	\$8.70	\$119.10	7.30%	2	\$8.40	7.72%
VA	Southampton	1	\$4.90	\$90.00	5.44%	1	\$4.60	5.50%
VA	Spotsylvania	5	\$23.70	\$767.80	3.09%	4	\$18.40	2.65%
VA	Suffolk City	3	\$13.90	\$303.80	4.58%	3	\$13.20	4.75%
VA	Virginia Beach	14	\$64.10	\$1,654.60	3.87%	14	\$61.30	4.09%
VA	Westmoreland	2	\$8.70	\$49.90	17.43%	2	\$8.40	18.63%
VA	York	2	\$10.70	\$179.80	5.95%	2	\$10.30	6.29%

VA Recap: 156 stores with sales of \$840.2 million. Total retail food sales for VA in the study: \$23.56 billion. Walgreens share of VA is 3.57%.

Mid-Atlantic Recap: 327 stores with sales of \$1.77 billion annually. Mid-Atlantic retail food sales total: \$54.9 billion.

Walgreens Per Store Average: \$5.41 million

Source: *Food World*, June 2021

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DIRECTORY OF RETAILERS

from page 66

CEO/Pres.: Joe Sheetz
Primary Supplier: Direct
Food World Stores: 145
Food World Vol.: \$557.8 million

Turkey Hill Minit Markets

Div. of EG Group
257 Centreville Rd.
Lancaster, PA 17603
Phone: (888) 200-6211
Web: turkeyhillcstores.com
Pres.: George Fournier
Primary Supplier: Core-Mark
Food World Stores: 113
Food World Vol.: \$163.6 million

Wawa, Inc.

Red Roof, 260 W. Baltimore Pike
Wawa, PA 19063
Phone: (610) 358-8000
Web: wawa.com
CEO: Chris Gheysens
Primary Supplier: McLane/Direct
Food World Stores: 169
Food World Vol.: \$1.15 billion

WHOLESALE CLUBS

BJ's Wholesale Club
25 Research Dr.
Westborough, MA 01581

Phone: (774) 512-7400
Web: bjs.com
CEO: Bob Eddy
Food World Stores: 29
Food World Vol.: \$1.05 billion (grocery/HBC only)

Costco

Northeast Div.
45940 Horseshoe Dr., Ste. 150
Sterling, VA 20166
Phone: (703) 406-6800
Web: costco.com
Pres. Craig Jelinek
Northeast Div. SVP/GM: Jeffrey Long
Food World Stores: 30
Food World Vol.: \$1.74 billion (grocery/HBC only)

Sam's Club

2101 SE Simple Savings Dr.
Bentonville, AR 72716
Phone: (501) 273-4000
Web: samsclub.com
CEO/Pres.: Kathryn McLay
Food World Stores: 26
Food World Vol.: \$1.02 million (grocery/HBC only)

MASS MERCHANDISERS

Kmart
Div. of Transform Holdco.

3333 Beverly Rd.
Hoffman Estates, IL 60179
Phone: (847) 286-2500
Web: kmart.com
CEO: Jeremy Conlin
Food World Stores: 3
Food World Vol.: \$17.3 million (grocery/HBC only)

Target

1000 Nicollet Mall
Minneapolis, MN 55402
Phone: (612) 304-6073
Web: target.com
CEO: Brian Cornell
Food World Stores: 110 (includes Super Target)
Food World Vol.: \$1.85 billion (grocery/HBC only)


Walmart


702 Southwest 8th St.
Bentonville, AR 72716
Phone: (479) 273-4000
Web: walmart.com
CEO: Doug McMillon
Pres/CEO - U.S.: John Furner
Food World Stores: 161 (includes SuperCenter/Neighborhood Mkt.)
Food World Vol.: \$5.43 billion (grocery/HBC only)


VIRGINIA COUNTY SHARE OF MARKET: 2021


Total sales for those Virginia counties included in this study are \$26.6 billion


Rank	Company	Stores	Sales (in millions)	% of Market
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 ACCOMACK COUNTY (\$96.9 million) (Includes Chincoteague)				
<ul style="list-style-type: none"> Population 32,316 # of Households 13,438 Median Income \$46,073 Under 18 20.7% Over 65 24.6% Female 51.3% White 59.9% Black 28.8% Hispanic 9.1% Asian 80.0% 				
1	Food Lion	2	\$32.70	33.75%
2	Walmart (SuperCenter)	1	\$31.30	32.30%
3	Royal Farm Stores	5	\$11.40	11.76%
4	Fas-Marts	3	\$5.80	5.99%
5	Great Valu	1	\$5.30	5.47%
6	Walgreens	1	\$5.20	5.37%
7	CVS	1	\$4.30	4.44%
8	C&S Independents	1	\$2.54	2.62%
		15	\$98.54	101.69%*

 ALBEMARLE COUNTY Including CHARLOTTESVILLE (\$641.7 million) (Includes, Keswick, White Hall)				
<ul style="list-style-type: none"> Population 156,596 # of Households 60,113 Median Income \$69,678 Under 18 17.9% Over 65 15.8% Female 51.9% White 71.6% Black 14.1% Hispanic 5.8% Asian 6.4% 				
1	Kroger	3	\$138.40	21.57%
2	Harris Teeter	3	\$73.70	11.49%
3	Wegmans	1	\$71.40	11.13%
4	Food Lion	6	\$65.60	10.22%
5	Costco	1	\$37.60	5.86%
6	Walmart	1	\$36.80	5.73%
7	Giant Food	1	\$35.70	5.56%
8	Whole Foods	1	\$35.60	5.55%
9	CVS	8	\$29.80	4.64%
10	Sam's Club	1	\$25.30	3.94%
11	Trader Joe's	1	\$21.30	3.32%
12	7-Eleven	8	\$16.30	2.54%
13	Target	1	\$14.20	2.21%
14	Fas-Marts	6	\$13.20	2.06%
15	Walgreens	2	\$9.70	1.51%
16	Great Valu	1	\$9.10	1.42%
17	Sheetz	1	\$4.10	0.64%
18	Circle K	1	\$2.10	0.33%
		47	\$639.90	99.72%

 ARLINGTON COUNTY (\$949.8 million) (Includes Arlington)				
<ul style="list-style-type: none"> Population 236,842 # of Households 107,032 Median Income \$120,071 Under 18 18.1% Over 65 11.1% Female 49.9% White 61.4% Black 9.7% Hispanic 15.6% Asian 11.0% 				
1	Harris Teeter	6	\$260.60	27.44%
2	Giant Food	4	\$114.14	12.02%
3	CVS	18	\$100.70	10.60%
4	Whole Foods	2	\$79.20	8.34%
5	Albertsons (Safeway)	4	\$69.86	7.36%
6	Costco	1	\$66.80	7.03%
7	7-Eleven	28	\$64.10	6.75%
8	Target	2	\$42.30	4.45%
9	Military Commissaries	1	\$41.81	4.40%
10	Trader Joe's	1	\$34.20	3.60%
11	Walgreens	5	\$32.40	3.41%
12	MOM's Organic Market	1	\$13.90	1.46%
13	International Markets	1	\$12.90	1.36%
14	Lidl	1	\$8.40	0.88%
15	Streets Market	1	\$6.80	0.72%
		76	\$948.11	99.82%

 CAROLINE COUNTY (\$32.4 million) (Includes Bowling Green)				
<ul style="list-style-type: none"> Population 30,725 # of Households 10,946 Median Income \$65,103 Under 18 22.8% Over 65 16.9% Female 50.5% White 63.2% Black 27.2% Hispanic 5.2% Asian 1.1% 				
1	Food Lion	2	\$16.50	50.93%
2	Walgreens	1	\$4.70	14.51%
3	Sheetz	1	\$4.50	13.89%
4	CVS	1	\$4.20	12.96%
5	7-Eleven	1	\$2.30	7.10%
		6	\$32.20	99.38%

 CHARLES CITY COUNTY (\$4.9 million) (Includes Charles City. Multi-store retailers do not operate in this county.)				
<ul style="list-style-type: none"> Population 6,963 # of Households 2,896 Median Income \$57,198 Under 18 14.7% Over 65 25.5% Female 51.5% White 43.6% Black 44.4% Hispanic 1.8% Asian 0.6% 				

Multi-store retailers do not operate in this county.

See VIRGINIA COUNTY SHARE on page 114

Are You Reaching Your Food & Drug Customers In This \$200 Billion Marketing Area?



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- Costco**, Issaquah, WA
- Grocery Outlet**, Emeryville, CA
- Kroger**, Cincinnati, OH
- Sam's Club**, Bentonville, AR
- Save-A-Lot**, St. Ann, MO
- Sprouts**, Phoenix, AZ
- Target**, Minneapolis, MN
- Trader Joe's**, Monrovia, CA
- Wal-Mart**, Bentonville, AR
- Walgreens**, Deerfield, IL
- Whole Foods**, Austin, TX
- 7-Eleven**, Dallas, TX



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VIRGINIA COUNTY SHARE OF MARKET: 2021

Continued from page 112



CHESAPEAKE CITY (\$881.3 million)

• Population	222,311	• Female	51.1%
• # of Households	84,849	• White	56.7%
• Median Income	\$78,640	• Black	30.6%
• Under 18	24.1%	• Hispanic	6.6%
• Over 65	13.7%	• Asian	3.5%

1	Walmart (SC/Neighborhood Mkt)	6	\$158.70	18.01%
2	Food Lion	12	\$146.20	16.56%
3	Kroger (Marketplace)	4	\$121.20	13.75%
4	7-Eleven	41	\$88.60	10.05%
5	Harris Teeter	3	\$77.30	8.77%
6	Sam's Club	2	\$71.50	8.11%
7	CVS	6	\$37.50	4.26%
8	Target	3	\$29.50	3.35%
9	BJ's Wholesale Club	1	\$29.30	3.32%
10	Rite Aid	9	\$28.60	3.24%
11	Walgreens	6	\$25.60	2.91%
12	Wawa	4	\$23.59	2.84%
13	Aldi	3	\$17.70	2.01%
14	Lidl	1	\$7.70	0.87%
15	Kmart	1	\$4.90	0.55%
16	Miller Marts	2	\$4.10	0.46%
17	Circle K	2	\$3.90	0.44%
18	Royal Farm Stores	1	\$2.70	0.31%
		107	\$878.59	99.69%

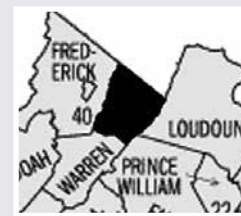


CHESTERFIELD COUNTY Includes COLONIAL HEIGHTS (\$1.4 billion) (Including Chester, Midlothian)

• Population	370,172	• Female	53.0%
• # of Households	132,007	• White	65.7%
• Median Income	\$68,575	• Black	20.6%
• Under 18	23.6%	• Hispanic	8.1%
• Over 65	17.6%	• Asian	3.8%

1	Kroger (Marketplace)	7	\$257.50	17.84%
2	Walmart (SC/Neighborhood Mkt)	6	\$230.70	15.98%
3	Food Lion	17	\$209.20	14.49%
4	Wawa	14	\$117.67	8.15%
5	CVS	22	\$99.30	6.88%
6	Publix	5	\$78.40	5.43%
7	Wegmans	1	\$63.20	4.38%
8	Sam's Club	2	\$61.80	4.28%
9	Target	5	\$60.70	4.20%
10	Walgreens	10	\$60.10	4.16%

11	Costco	1	\$47.10	3.26%
12	Aldi	4	\$30.20	2.09%
13	7-Eleven	18	\$29.80	2.06%
14	Trader Joe's	1	\$20.60	1.43%
15	International Markets	3	\$20.30	1.41%
16	Sheetz	5	\$16.90	1.17%
17	Fresh Market	2	\$14.80	1.03%
18	Lidl	2	\$13.30	0.92%
19	Rite Aid	4	\$13.10	0.91%
20	Circle K	1	\$2.00	0.14%
21	Dash-In	1	\$2.00	0.14%
		131	\$1,448.67	100.35%*



CLARKE COUNTY (\$15.6 million) (Includes Berryville, Boyce)

• Population	14,619	• Female	50.5%
• # of Households	5,612	• White	85.3%
• Median Income	\$80,026	• Black	4.7%
• Under 18	19.5%	• Hispanic	6.4%
• Over 65	21.8%	• Asian	1.4%

1	7-Eleven	3	\$6.90	44.23%
2	Sheetz	1	\$3.80	24.36%
3	Circle K	1	\$1.90	12.18%
		5	\$12.60	80.77%



CULPEPER COUNTY (\$164.8 million) (Includes Culpeper, Rapidan)

• Population	52,605	• Female	50.1%
• # of Households	17,071	• White	69.8%
• Median Income	\$77,935	• Black	14.6%
• Under 18	24.7%	• Hispanic	11.6%
• Over 65	16.0%	• Asian	1.7%

1	The Giant Company (Martin's)	1	\$43.23	26.23%
2	Walmart (SuperCenter)	1	\$30.40	18.45%
3	Albertsons (Safeway)	1	\$14.21	8.62%
4	Target	1	\$14.00	8.50%
5	7-Eleven	6	\$13.40	8.13%
6	Walgreens	2	\$12.20	7.40%
7	Weis Markets	1	\$11.84	7.18%
8	Aldi	1	\$8.90	5.40%
9	Lidl	1	\$7.40	4.49%
10	CVS	2	\$6.90	4.19%
		17	\$162.48	98.59%

See VIRGINIA COUNTY SHARE on page 116

IN REVIEW: CVS

State	County	2021 Stores	2021 Sales (in millions)	2021 County Food Sales	% of 2021 County Market	2020 Stores	2020 Sales (in millions)	% of 2020 County Market
DC	Washington	64	\$508.60	\$2,414.60	21.06%	63	\$477.30	21.73%
DC Recap: 64 stores with sales of \$508.6 million. Total retail food sales for DC in the study: \$2.41 billion. CVS share of DC is 21.06%.								
DE	Kent	3	\$16.50	\$515.80	3.20%	3	\$15.80	3.39%
DE	Sussex	6	\$32.00	\$966.30	3.31%	6	\$29.80	3.45%
DE Recap: 9 stores with sales of \$48.5 million. Total retail food sales for DE in the study: \$1.48 billion. CVS share of DE is 3.27%.								
MD	Anne Arundel	22	\$116.20	\$2,275.40	5.11%	21	\$107.20	5.26%
MD	Baltimore City	16	\$89.80	\$1,520.20	5.91%	17	\$88.20	6.45%
MD	Baltimore County	27	\$149.80	\$3,273.90	4.58%	25	\$132.70	4.53%
MD	Calvert	3	\$14.30	\$387.30	3.69%	3	\$13.10	3.75%
MD	Carroll	6	\$30.40	\$663.10	4.58%	5	\$25.10	4.22%
MD	Cecil	1	\$4.80	\$279.30	1.72%	1	\$4.50	1.79%
MD	Charles	8	\$39.20	\$516.30	7.59%	8	\$37.70	8.38%
MD	Frederick	12	\$64.40	\$907.30	7.10%	12	\$64.20	7.76%
MD	Harford	8	\$34.70	\$1,020.80	3.40%	8	\$32.10	3.45%
MD	Howard	9	\$42.80	\$1,175.20	3.64%	8	\$35.70	3.27%
MD	Montgomery	47	\$451.60	\$3,640.10	12.41%	46	\$426.50	12.50%
MD	Prince George's	48	\$257.50	\$3,085.20	8.35%	49	\$253.60	8.94%
MD	Queen Anne's	1	\$5.60	\$136.80	4.09%	1	\$5.30	4.06%
MD	St. Mary's	5	\$19.10	\$396.70	4.81%	5	\$18.20	5.16%
MD	Talbot	2	\$7.40	\$217.10	3.41%	2	\$7.10	3.62%
MD	Washington	7	\$21.40	\$520.60	4.11%	7	\$20.80	4.51%
MD	Wicomico	2	\$6.90	\$279.40	2.47%	2	\$6.50	2.47%
MD	Worcester	3	\$18.00	\$230.70	7.80%	3	\$17.40	8.30%
MD Recap: 227 stores with sales of \$1.37 billion. Total retail food sales for MD in the study: \$20.8 billion. CVS share of MD is 6.6%.								
PA	Adams	1	\$4.90	\$200.40	2.45%	1	\$4.70	2.54%
PA	Cumberland	14	\$64.10	\$1,138.40	5.63%	14	\$61.30	6.08%
PA	Dauphin	14	\$62.30	\$1,022.10	6.10%	13	\$56.10	6.06%
PA	Franklin	5	\$21.10	\$459.90	4.59%	5	\$20.20	4.89%
PA	Lancaster	24	\$112.50	\$1,740.00	6.47%	22	\$99.10	6.37%
PA	Lebanon	4	\$16.90	\$409.60	4.13%	4	\$15.90	4.19%
PA	York	12	\$57.20	\$1,569.30	3.64%	13	\$57.60	4.05%
PA Recap: 74 stores with sales of \$339.0 million. Total retail food sales for PA in the study: \$6.65 billion. CVS share of PA is 5.1%.								
VA	Accomack	1	\$4.30	\$96.90	4.44%	1	\$4.00	4.66%
VA	Albemarle	8	\$29.80	\$641.70	4.64%	8	\$28.40	4.90%
VA	Arlington	18	\$100.70	\$949.80	10.60%	15	\$80.60	9.53%
VA	Caroline	1	\$4.20	\$32.40	12.96%	1	\$3.90	13.04%
VA	Chesapeake City	6	\$37.50	\$883.10	4.46%	6	\$35.80	4.36%
VA	Chesterfield	22	\$99.30	\$1,443.60	6.88%	22	\$94.70	7.29%
VA	Culpeper	2	\$6.90	\$164.80	4.19%	2	\$6.60	4.70%
VA	Dinwiddie	1	\$5.50	\$131.10	4.20%	1	\$5.20	4.22%
VA	Fairfax	66	\$319.60	\$5,331.40	5.99%	65	\$299.60	6.18%
VA	Fauquier	2	\$7.50	\$176.90	4.24%	2	\$7.20	4.33%
VA	Frederick	8	\$29.10	\$496.30	5.86%	8	\$27.80	6.08%
VA	Greene	1	\$4.40	\$23.00	19.13%	1	\$4.10	20.10%
VA	Hampton/Newport News	8	\$35.70	\$1,121.80	3.18%	8	\$34.20	3.26%
VA	Hanover	5	\$23.80	\$460.90	5.16%	6	\$25.40	5.99%
VA	Henrico	29	\$129.90	\$1,905.30	6.82%	30	\$129.20	7.35%
VA	Isle of Wight	2	\$10.50	\$89.30	11.76%	2	\$10.10	12.27%
VA	James City	6	\$31.20	\$409.60	7.62%	6	\$29.80	7.82%
VA	King George	1	\$4.80	\$90.80	5.29%	1	\$4.50	5.34%
VA	Lancaster	1	\$3.80	\$79.50	4.78%	1	\$3.60	4.51%
VA	Loudoun	12	\$53.60	\$1,472.40	3.64%	12	\$51.30	3.72%
VA	Louisa	1	\$4.90	\$48.10	10.19%	1	\$4.60	10.41%
VA	Norfolk City	7	\$43.00	\$754.70	5.70%	7	\$41.10	5.72%
VA	Orange	2	\$11.80	\$120.60	9.78%	2	\$11.20	10.26%
VA	Page	1	\$4.70	\$69.30	6.78%	1	\$4.50	6.94%
VA	Portsmouth City	3	\$14.90	\$273.50	5.45%	3	\$14.20	5.09%
VA	Powhatan	1	\$4.50	\$73.70	6.11%	1	\$4.30	6.33%
VA	Prince George	1	\$4.40	\$84.90	5.18%	1	\$4.20	5.46%
VA	Prince William	18	\$85.10	\$1,856.40	4.58%	18	\$81.60	4.83%
VA	Shenandoah	1	\$3.90	\$119.10	3.27%	1	\$3.60	3.31%
VA	Spotsylvania	15	\$78.40	\$767.80	10.21%	15	\$74.90	10.80%
VA	Stafford	5	\$23.50	\$428.40	5.49%	4	\$17.90	4.89%
VA	Suffolk City	1	\$4.90	\$303.80	1.61%	1	\$4.60	1.66%
VA	Virginia Beach	13	\$56.20	\$1,654.60	3.40%	13	\$53.90	3.60%
VA	Warren	2	\$7.50	\$146.80	5.11%	2	\$7.10	5.06%
VA	York	1	\$4.50	\$179.80	2.50%	1	\$4.30	2.63%
VA Recap: 272 stores with sales of \$1.29 billion. Total retail food sales for VA in the study: \$23.56 billion. CVS share of VA is 5.51%.								

Mid-Atlantic Recap: 646 stores with sales of \$3.56 billion annually. Mid-Atlantic retail food sales total: \$54.9 billion.

CVS Per Store Average: \$5.52 million

Source: Food World, June 2021

VIRGINIA COUNTY SHARE OF MARKET: 2021

Continued from page 114



CUMBERLAND COUNTY (\$9.3 million) (Includes Cumberland)

• Population	9,932	• Female	51.6%
• # of Households	3,975	• White	63.5%
• Median Income	\$47,469	• Black	30.5%
• Under 18	18.9%	• Hispanic	3.2%
• Over 65	23.1%	• Asian	0.5%

Multi-store retailers do not operate in this county.



DINWIDDIE COUNTY Including PETERSBURG (\$131.1 million) (Includes Dinwiddie, Church Road)

• Population	59,890	• Female	52.6%
• # of Households	23,566	• White	38.7%
• Median Income	\$49,513	• Black	54.6%
• Under 18	21.3%	• Hispanic	4.5%
• Over 65	17.5%	• Asian	1.0%

1	Walmart (SuperCenter)	1	\$40.40	30.82%
2	Food Lion	4	\$38.10	29.06%
3	Walgreens	2	\$10.50	8.01%
4	Save-A-Lot	1	\$5.70	4.35%
5	7-Eleven	2	\$5.60	4.27%
6	International Markets	1	\$5.60	4.27%
7	CVS	1	\$5.50	4.20%
8	Wawa	1	\$5.36	4.09%
9	Rite Aid	1	\$4.40	3.36%
10	Sheetz	1	\$4.10	3.13%
11	Fas-Marts	1	\$2.00	1.53%
		16	\$127.26	97.07%



ESSEX COUNTY (\$61.8 million) (Includes Tappahannock)

• Population	10,953	• Female	53.1%
• # of Households	4,555	• White	54.9%
• Median Income	\$51,954	• Black	37.4%
• Under 18	18.4%	• Hispanic	3.9%
• Over 65	23.7%	• Asian	1.2%

1	Walmart	1	\$39.00	63.11%
2	Food Lion	1	\$11.20	18.12%
3	Walgreens	1	\$5.00	8.09%
4	Sheetz	1	\$3.60	5.83%
5	Fas-Marts	1	\$2.10	3.40%
		5	\$60.90	98.54%



FAIRFAX CO. Including FALLS CHURCH, FAIRFAX, ALEXANDRIA (\$5.3 billion) (Includes McLean, Reston, Springfield)

• Population	1,345,596	• Female	51.1%
• # of Households	481,169	• White	57.3%
• Median Income	\$117,590	• Black	10.5%
• Under 18	22.2%	• Hispanic	15.3%
• Over 65	13.6%	• Asian	13.3%

1	Giant Food	29	\$1,064.02	19.96%
2	Albertsons (Safeway/Balducci's)	26	\$559.99	10.50%
3	International Markets	32	\$407.40	7.64%
4	Wegmans	4	\$406.80	7.63%
5	Costco	4	\$357.30	6.70%
6	Harris Teeter	9	\$346.50	6.50%
7	CVS	66	\$319.60	5.99%
8	Whole Foods	7	\$276.50	5.19%
9	Walmart (SuperCenter)	8	\$230.60	4.33%
10	Target	11	\$226.30	4.24%
11	7-Eleven	135	\$220.60	4.14%
12	Trader Joe's	7	\$185.60	3.48%
13	Walgreens	24	\$133.20	2.50%
14	BJ's Wholesale Club	3	\$128.40	2.41%
15	Aldi	13	\$122.40	2.30%
16	Military Commissaries	1	\$82.82	1.55%
17	Shoppers	2	\$61.70	1.16%
18	MOM's Organic Market	3	\$47.90	0.90%
19	Lidl	4	\$36.20	0.68%
20	Food Lion	2	\$30.70	0.58%
21	Fresh Market	2	\$23.90	0.45%
22	Sprouts	1	\$19.30	0.36%
23	Wawa	2	\$7.57	0.14%
24	Streets Market	1	\$7.20	0.14%
25	Circle K	3	\$6.00	0.11%
26	ASG	1	\$4.99	0.09%
27	Sheetz	1	\$4.00	0.08%
28	C&S Independents	3	\$1.67	0.03%
		404	\$5,319.16	99.77%



FAUQUIER COUNTY (\$176.9 million) (Includes Remington, Warrenton)

• Population	71,222	• Female	50.6%
• # of Households	24,562	• White	79.0%
• Median Income	\$100,783	• Black	7.8%
• Under 18	23.1%	• Hispanic	9.2%
• Over 65	16.9%	• Asian	1.7%

1	Walmart (SuperCenter)	1	\$36.10	20.41%
2	Giant Food	1	\$32.69	18.48%

See VIRGINIA COUNTY SHARE on page 118

TAKING STOCK

from page 100

like it was only a few months ago that I ran into Ben and he greeted me as he always had - "How's your family? How's your business?" These weren't throwaway lines for him - Ben really was interested and concerned. He will be missed...from the world of entertainment we lost a great actor, Ned Beatty, who passed away earlier this month at the age of 83. Rarely gaining the spotlight, Beatty's film career did begin with a bang, with his role as insurance salesman Bobby Trippe in the great film "Deliverance" (1972). In the most memorable scene of the movie, Beatty is ordered to strip down to his undershorts and then is forced to squeal like a pig by his attacker. While "Deliverance" helped make Beatty a sought-after actor, other future roles, including "All The President's Men" (1976) and the stellar film "Network" (1976), cemented his reputation as a first-call performer. His other notable film credits included roles in "Superman" (1978) and "Rudy" (1993). All told, Beatty appeared in more than 160 film and TV shows. He also performed in many plays...Gavin MacLeod is also dead. MacLeod began his career in the late 1950s and most often appeared in small character roles on TV. His first big break came in 1962 when he was cast as Seaman Joseph Haines, one of Quinton McHale's (Ernest Borgnine) itinerant group of misfits on a World War II PT boat in the sitcom "McHale's Navy." From there, he became a regular as head writer Murray Slaughter on the iconic "The Mary Tyler Moore Show" (1970-1976). MacLeod mainly played it straight, offsetting other more animated characters such as anchorman Ted Baxter (Ted Knight) and news director Lou Grant (Ed Asner). He finally received the full spotlight treatment in his next role as Captain Stubing on awful sitcom "The Love Boat" (1977-1986). MacLeod, 90, appeared in 108 roles in a career that spanned nearly 60 years..."Linc" has also left us. Clarence Williams III died earlier this month at the age of 81. Williams, a fine actor whose career began in 1959, appeared in 99 film and TV roles (and several Broadway plays). However, he will always be best-known by Baby Boomers as Linc Hayes, the young, cool undercover police officer in the TV series "The Mod Squad" (1968-1973). The show was the first in its genre to focus on the hippie generation and also featured newcomers Michael Cole and Peggy Lipton. However, it was Williams who really stood out. His well-groomed Afro and imposing deep voice made you pay immediate attention to his character. When "The Mod Squad" ended after a five-year run, Williams found it difficult to find meaningful roles, having been typecast. However, by the early 1980s, his career was resurrected as a character actor in such films as "Purple Rain" (1984); "52 Pick-Up" (1986); and "Tough Guys Don't Dance" (1987). He returned to TV in the 90s and stood out in such shows as "Against The Wall" (1994), and as Muhammad Ali's father in "Ali: An American Hero" (2000)...finally, I want to say thanks to our great team from Best-Met Publishing as well as our many readers and loyal advertisers. It's been a helluva a year, but most of us can now look ahead. However, it's important to also look back and remember those we have lost or who have endured extreme hardship during the pandemic. While we are all blessed to be part of a great industry that prospered during the difficulties of dealing with COVID-19, let's not forget those who were not as fortunate.



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VIRGINIA COUNTY SHARE OF MARKET: 2021

Continued from page 116


3	Food Lion	3	\$23.10	13.06%
4	Albertsons (Safeway)	1	\$19.06	10.77%
5	Harris Teeter	1	\$18.90	10.68%
6	Sheetz	3	\$12.90	7.29%
7	Walgreens	2	\$10.60	5.99%
8	7-Eleven	6	\$9.30	5.26%
9	CVS	2	\$7.50	4.24%
10	Wawa	1	\$4.12	2.33%
11	Circle K	1	\$2.20	1.24%
		22	\$176.47	99.76%



FREDERICK COUNTY (\$496.6 million)
(Includes Stephens City)

- Population 117,391
- # of Households 41,993
- Median Income \$68,410
- Under 18 22.6%
- Over 65 17.1%
- Female 50.5%
- White 74.0%
- Black 8.0%
- Hispanic 13.8%
- Asian 2.3%


1	The Giant Company (Martin's)	3	\$154.34	31.10%
2	Walmart (SuperCenter)	3	\$141.80	28.57%
3	Costco	1	\$55.20	11.12%
4	CVS	8	\$29.10	5.86%
5	Target	2	\$25.60	5.16%
6	Sheetz	6	\$25.40	5.12%
7	Walgreens	4	\$21.80	4.39%
8	Sharp Shopper	1	\$16.30	3.28%
9	7-Eleven	9	\$15.10	3.04%
10	Aldi	1	\$7.90	1.59%
		38	\$492.54	99.24%



GLOUCESTER COUNTY (\$122.4 million)
(Includes Gloucester)

- Population 37,348
- # of Households 14,786
- Median Income \$70,537
- Under 18 19.9%
- Over 65 19.6%
- Female 50.8%
- White 84.7%
- Black 8.0%
- Hispanic 3.8%
- Asian 0.9%


1	Walmart (SuperCenter)	1	\$33.90	27.70%
2	Food Lion	2	\$22.80	18.63%
3	Kroger	1	\$20.60	16.83%
4	7-Eleven	8	\$14.90	12.17%
5	Aldi	1	\$9.90	8.09%
6	Rite Aid	2	\$7.60	6.21%
7	Wawa	1	\$6.99	5.71%
8	Walgreens	1	\$5.20	4.25%
		17	\$121.89	99.58%



GOOCHLAND COUNTY (\$30.9 million)
(Includes Goochland, Manakin)

- Population 23,753
- # of Households 8,506
- Median Income \$93,994
- Under 18 17.2%
- Over 65 22.9%
- Female 50.9%
- White 77.8%
- Black 15.8%
- Hispanic 3.1%
- Asian 1.7%


1	Food Lion	2	\$21.60	69.90%
2	Wawa	1	\$8.61	27.86%
		3	\$30.21	97.77%



GREENE COUNTY (\$23.0 million)
(Includes Stanardsville)

- Population 19,819
- # of Households 7,548
- Median Income \$67,398
- Under 18 23.8%
- Over 65 17.8%
- Female 51.3%
- White 82.2%
- Black 7.3%
- Hispanic 6.0%
- Asian 2.0%

1	Food Lion	1	\$9.40	40.87%
2	Great Valu	1	\$9.10	39.57%
3	CVS	1	\$4.40	19.13%
		3	\$22.90	99.57%



HAMPTON/NEWPORT NEWS CITY (\$1.1 billion)

- Population 313,735
- # of Households 123,885
- Median Income \$54,751
- Under 18 22.0%
- Over 65 14.5%
- Female 51.9%
- White 39.9%
- Black 47.1%
- Hispanic 7.8%
- Asian 2.9%

1	Food Lion	16	\$280.20	24.98%
2	Walmart (SC/Neighborhood Mkt)	5	\$149.60	13.34%
3	7-Eleven	61	\$125.40	11.18%
4	Military Commissaries	2	\$64.51	5.75%
5	Walgreens	8	\$44.70	3.98%
6	Harris Teeter	2	\$40.60	3.62%
7	BJ's Wholesale Club	1	\$38.50	3.43%
8	Wawa	7	\$37.72	3.36%
9	Costco	1	\$37.10	3.31%
10	Sam's Club	1	\$35.90	3.20%
11	CVS	8	\$35.70	3.18%
12	Whole Foods	1	\$32.30	2.88%
13	Kroger	1	\$31.80	2.83%
14	Rite Aid	9	\$31.10	2.77%
15	Target	2	\$25.90	2.31%
16	Lidl	3	\$25.70	2.29%
17	Aldi	3	\$24.30	2.17%

See VIRGINIA COUNTY SHARE on page 119

VIRGINIA COUNTY SHARE OF MARKET: 2021

Continued from page 118

18	Trader Joe's	1	\$15.90	1.42%
19	Fresh Market	1	\$12.20	1.09%
20	International Markets	1	\$11.80	1.05%
21	Save-A-Lot	2	\$9.40	0.84%
22	Miller Marts	4	\$7.70	0.69%
23	Circle K	1	\$1.90	0.17%
		141	\$1,119.93	99.83%

6	Wawa	12	\$122.04	6.41%
7	Walgreens	20	\$115.90	6.08%
8	7-Eleven	49	\$99.30	5.21%
9	Target	6	\$92.20	4.84%
10	Wegmans	1	\$65.40	3.43%
11	Whole Foods	2	\$44.60	2.34%
12	Costco	1	\$43.90	2.30%
13	BJ's Wholesale Club	1	\$43.20	2.27%
14	Aldi	6	\$42.50	2.23%
15	Sam's Club	1	\$39.10	2.05%
16	International Markets	2	\$30.10	1.58%
17	Lidl	4	\$25.80	1.36%
18	Fas-Marts	16	\$24.60	1.29%
19	Fresh Market	2	\$23.90	1.25%
20	Trader Joe's	1	\$18.80	0.99%
21	Rite Aid	2	\$8.90	0.47%
22	Save-A-Lot	2	\$8.20	0.43%
23	B. Green (Shoppers Value)	1	\$7.90	0.41%
24	Dash-In	2	\$4.70	0.25%
25	Sheetz	1	\$3.90	0.20%
		201	\$1,885.84	98.98%



HANOVER COUNTY (\$460.9 million) (Includes Ashland, Mechanicsville)

• Population	107,766	• Female	51.0%
• # of Households	38,987	• White	83.5%
• Median Income	\$89,390	• Black	9.5%
• Under 18	21.7%	• Hispanic	3.1%
• Over 65	18.4%	• Asian	1.9%

1	Walmart (SC/Neighborhood Mkt)	3	\$102.10	22.15%
2	Kroger (Marketplace)	2	\$98.10	21.28%
3	Food Lion	6	\$72.70	15.77%
4	Wawa	4	\$35.35	7.67%
5	BJ's Wholesale Club	1	\$33.60	7.29%
6	CVS	5	\$23.80	5.16%
7	Publix	1	\$16.70	3.62%
8	Target	1	\$15.70	3.41%
9	Walgreens	3	\$15.60	3.38%
10	7-Eleven	7	\$14.90	3.23%
11	Fas-Marts	8	\$11.50	2.50%
12	Aldi	1	\$8.10	1.76%
13	Sheetz	2	\$6.50	1.41%
14	Dash-In	1	\$2.10	0.46%
15	Circle K	1	\$1.70	0.37%
		46	\$458.45	99.47%



ISLE OF WIGHT COUNTY (\$89.3 million) (Includes Smithfield)

• Population	37,109	• Female	51.0%
• # of Households	14,587	• White	70.2%
• Median Income	\$73,991	• Black	23.2%
• Under 18	20.8%	• Hispanic	3.4%
• Over 65	19.8%	• Asian	1.0%

1	Food Lion	3	\$35.30	39.53%
2	Kroger	1	\$27.40	30.68%
3	CVS	2	\$10.50	11.76%
4	Rite Aid	2	\$7.70	8.62%
5	Royal Farm Stores	1	\$2.60	2.91%
6	7-Eleven	1	\$2.30	2.58%
7	Miller Marts	1	\$1.90	2.13%
		11	\$87.70	98.21%



HENRICO COUNTY Including RICHMOND CITY (\$1.9 billion) (Includes Highland Springs, Sandston)

• Population	561,254	• Female	52.6%
• # of Households	240,528	• White	47.2%
• Median Income	\$58,779	• Black	38.9%
• Under 18	19.8%	• Hispanic	6.7%
• Over 65	14.9%	• Asian	5.7%

1	Kroger (Marketplace)	9	\$283.40	14.87%
2	Walmart (SuperCenter)	7	\$268.50	14.09%
3	Food Lion	14	\$190.80	10.01%
4	Publix	10	\$148.30	7.78%
5	CVS	29	\$129.90	6.81%



JAMES CITY CO. Including WILLIAMSBURG (\$409.6 million) (Includes Norge, Toano)

• Population	91,477	• Female	52.9%
• # of Households	33,626	• White	71.7%
• Median Income	\$72,705	• Black	14.8%
• Under 18	15.3%	• Hispanic	6.6%
• Over 65	21.7%	• Asian	4.3%

1	Harris Teeter	3	\$102.70	25.07%
2	Walmart (SC/Neighborhood Mkt)	2	\$70.80	17.29%
3	Food Lion	5	\$59.80	14.60%

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VIRGINIA COUNTY SHARE OF MARKET: 2021

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4	CVS	6	\$31.20	7.62%
5	7-Eleven	17	\$24.80	6.05%
6	Target	2	\$23.10	5.64%
7	Trader Joe's	1	\$17.70	4.32%
8	Rite Aid	4	\$15.40	3.76%
9	Publix	1	\$13.20	3.22%
10	Fresh Market	1	\$12.90	3.15%
11	Wawa	2	\$9.21	2.25%
12	Aldi	1	\$7.90	1.93%
13	Walgreens	1	\$6.60	1.61%
14	Fas-Marts	2	\$4.40	1.07%
15	Miller Marts	1	\$1.80	0.44%
		49	\$401.51	98.02%



KING & QUEEN COUNTY (\$5.8 million) (Includes King & Queen Courthouse)

- Population 7,025
- # of Households 2,707
- Median Income \$63,982
- Under 18 17.5%
- Over 65 23.6%
- Female 49.0%
- White 66.4%
- Black 26.2%
- Hispanic 3.1%
- Asian 0.5%

Multi-store retailers do not operate in this county.



KING GEORGE COUNTY (\$90.8 million) (Includes King George)

- Population 26,836
- # of Households 9,202
- Median Income \$94,274
- Under 18 24.6%
- Over 65 13.4%
- Female 49.4%
- White 73.3%
- Black 16.1%
- Hispanic 5.8%
- Asian 1.6%

1	Walmart (SuperCenter)	1	\$33.90	37.33%
2	Food Lion	2	\$26.10	28.74%
3	Sheetz	2	\$8.40	9.25%
4	Wawa	1	\$5.80	6.39%
5	CVS	1	\$4.80	5.29%
6	Fas-Marts	2	\$3.90	4.30%
7	7-Eleven	2	\$3.80	4.19%
8	Military Commissaries	1	\$2.60	2.86%
		12	\$89.30	98.35%



KING WILLIAM COUNTY (\$37.4 million) (Includes West Point)

- Population 17,148
- # of Households 6,078
- Median Income \$66,987
- Under 18 22.8%
- Over 65 16.3%
- Female 51.1%
- White 77.2%
- Black 15.4%
- Hispanic 2.9%
- Asian 1.1%

1	Food Lion	2	\$30.30	81.02%
2	7-Eleven	2	\$4.20	11.23%
3	Fas-Marts	1	\$2.10	5.61%
		5	\$36.60	97.86%



LANCASTER COUNTY (\$79.5 million) (Includes Kilmarnock)

- Population 10,603
- # of Households 5,062
- Median Income \$53,711
- Under 18 15.5%
- Over 65 36.7%
- Female 52.7%
- White 67.1%
- Black 28.4%
- Hispanic 2.5%
- Asian 0.8%

1	Walmart (SuperCenter)	1	\$34.20	43.02%
2	Great Valu	1	\$15.10	18.99%
3	Food Lion	1	\$14.10	17.74%
4	Walgreens	1	\$5.50	6.92%
5	CVS	1	\$3.80	4.78%
6	Fas-Marts	1	\$2.10	2.64%
		6	\$74.80	94.09%



LOUDOUN COUNTY (\$1.5 billion) (Includes Ashburn, Leesburg, Sterling)

- Population 413,538
- # of Households 128,637
- Median Income \$142,299
- Under 18 27.9%
- Over 65 9.7%
- Female 50.4%
- White 54.8%
- Black 8.1%
- Hispanic 13.9%
- Asian 20.3%

1	Giant Food	9	\$258.70	17.57%
2	Harris Teeter	9	\$235.30	15.98%
3	Wegmans	2	\$182.80	12.42%
4	Costco	2	\$148.20	10.07%
5	Walmart (SuperCenter)	3	\$115.40	7.84%
6	International Markets	4	\$69.30	4.71%
7	Target	3	\$56.50	3.84%
8	CVS	12	\$53.60	3.64%
9	Walgreens	10	\$50.60	3.44%
10	Albertsons (Safeway)	4	\$49.88	3.39%
11	Food Lion	3	\$38.40	2.61%
12	Aldi	4	\$38.30	2.60%
13	Sam's Club	1	\$36.70	2.49%
14	7-Eleven	22	\$35.40	2.40%

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VIRGINIA COUNTY SHARE OF MARKET: 2021

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15	Whole Foods	1	\$32.80	2.23%
16	Trader Joe's	1	\$19.30	1.31%
17	Sheetz	4	\$16.20	1.10%
18	Lidl	2	\$14.20	0.96%
19	Wawa	1	\$5.56	0.38%
20	Royal Farm Stores	2	\$5.10	0.35%
21	Circle K	2	\$4.30	0.29%
		101	\$1,466.54	99.60%



LOUISA COUNTY (\$48.1 million) (Includes Louisa, Mineral)

- Population 37,591
- # of Households 13,871
- Median Income \$60,975
- Under 18 20.1%
- Over 65 20.3%
- Female 50.5%
- White 78.1%
- Black 15.6%
- Hispanic 3.3%
- Asian 0.6%

1	Food Lion	2	\$21.80	45.32%
2	Sheetz	2	\$7.60	15.80%
3	B. Green (Shoppers Value)	1	\$5.10	10.60%
4	Walgreens	1	\$5.10	10.60%
5	CVS	1	\$4.90	10.19%
6	Fas-Marts	1	\$2.10	4.37%
		8	\$46.60	96.88%



MADISON COUNTY (\$13.9 million) (Includes Madison)

- Population 13,261
- # of Households 4,949
- Median Income \$57,895
- Under 18 20.1%
- Over 65 22.9%
- Female 51.6%
- White 84.3%
- Black 9.3%
- Hispanic 3.2%
- Asian 0.6%

1	Food Lion	1	\$13.70	98.56%
		1	\$13.70	98.56%



MATHEWS COUNTY (\$14.4 million) (Includes Mathews)

- Population 8,834
- # of Households 3,920
- Median Income \$64,237
- Under 18 15.6%
- Over 65 31.5%
- Female 51.6%
- White 85.7%
- Black 8.5%
- Hispanic 2.7%
- Asian 0.9%

1	Food Lion	1	\$14.10	97.92%
		1	\$14.10	97.92%



MIDDLESEX COUNTY (\$32.4 million) (Includes Urbanna)

- Population 10,582
- # of Households 4,603
- Median Income \$57,438
- Under 18 16.0%
- Over 65 32.0%
- Female 50.9%
- White 77.7%
- Black 16.6%
- Hispanic 2.9%
- Asian 0.5%

1	Food Lion	1	\$14.00	43.21%
2	7-Eleven	5	\$10.80	33.33%
3	Great Valu	1	\$6.30	19.44%
		7	\$31.10	95.99%



NEW KENT COUNTY (\$51.8 million) (Includes New Kent, Providence, Forge)

- Population 23,091
- # of Households 7,961
- Median Income \$87,904
- Under 18 19.9%
- Over 65 17.7%
- Female 49.1%
- White 77.9%
- Black 13.9%
- Hispanic 3.6%
- Asian 1.2%

1	Food Lion	3	\$34.90	67.37%
2	Walgreens	2	\$10.10	19.50%
3	Fas-Marts	2	\$4.60	8.88%
4	Circle K	1	\$2.10	4.05%
		8	\$51.70	99.81%



NORFOLK CITY (\$754.7 million)

- Population 242,827
- # of Households 88,353
- Median Income \$51,590
- Under 18 19.4%
- Over 65 11.6%
- Female 47.9%
- White 43.3%
- Black 42.1%
- Hispanic 8.5%
- Asian 3.8%


1	Walmart (SC/Neighborhood Mkt)	4	\$152.30	20.18%
2	Food Lion	8	\$132.40	17.54%
3	7-Eleven	48	\$94.60	12.53%
4	Harris Teeter	3	\$68.70	9.10%
5	Costco	1	\$44.10	5.84%
6	CVS	7	\$43.00	5.70%
7	Wawa	6	\$35.14	4.66%
8	Military Commissaries	1	\$32.75	4.34%
9	Walgreens	5	\$30.70	4.07%
10	BJ's Wholesale Club	1	\$29.10	3.86%
11	Rite Aid	6	\$19.10	2.53%
12	Fresh Market	1	\$16.40	2.17%
13	Aldi	2	\$13.40	1.78%
14	Target	1	\$13.00	1.72%
15	Lidl	1	\$8.10	1.07%

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VIRGINIA COUNTY SHARE OF MARKET: 2021

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16	Save-A-Lot	1	\$5.10	0.68%
17	Royal Farm Stores	1	\$3.00	0.40%
18	Miller Marts	1	\$2.10	0.28%
		98	\$742.99	98.45%



NORTHAMPTON COUNTY (\$36.8 million)
(Includes Cape Charles, Exmore)

- Population 11,710
- # of Households 5,148
- Median Income \$47,227
- Under 18 19.7%
- Over 65 27.0%
- Female 52.1%
- White 54.3%
- Black 33.7%
- Hispanic 9.5%
- Asian 1.0%


1	Food Lion	2	\$21.80	59.24%
2	Royal Farm Stores	2	\$5.60	15.22%
3	Fas-Marts	2	\$4.70	12.77%
4	Walgreens	1	\$4.40	11.96%
		7	\$36.50	99.18%



NORTHUMBERLAND COUNTY (\$20.5 million)
(Includes Heathsville)

- Population 12,095
- # of Households 5,584
- Median Income \$62,632
- Under 18 14.5%
- Over 65 37.5%
- Female 51.0%
- White 69.2%
- Black 25.0%
- Hispanic 3.8%
- Asian 0.5%

1	Food Lion	1	\$13.90	67.80%
2	Walgreens	1	\$4.50	21.95%
3	Fas-Marts	1	\$1.90	9.27%
		3	\$20.30	99.02%



NOTTOWAY COUNTY \$37.3 million)
(Includes Crewe, Nottoway)

- Population 15,232
- # of Households 5,446
- Median Income \$45,535
- Under 18 19.4%
- Over 65 19.3%
- Female 45.9%
- White 54.1%
- Black 39.3%
- Hispanic 4.8%
- Asian 0.6%

1	Walmart (SuperCenter)	1	\$33.60	90.08%
2	Fas-Marts	1	\$2.30	6.17%
		2	\$35.90	96.25%



ORANGE COUNTY (\$120.6 million)
(Includes Gordonsville, Orange)

- Population 37,051
- # of Households 13,679
- Median Income \$71,548
- Under 18 21.0%
- Over 65 20.6%
- Female 51.1%
- White 77.6%
- Black 13.3%
- Hispanic 5.6%
- Asian 1.1%

1	Walmart (SuperCenter)	2	\$62.80	52.07%
2	Food Lion	3	\$29.80	24.71%
3	CVS	2	\$11.80	9.78%
4	Sheetz	2	\$8.30	6.88%
5	7-Eleven	3	\$6.20	5.14%
6	Fas-Marts	3	\$6.20	5.14%
		15	\$125.10	103.73%*



PAGE COUNTY (\$69.3 million)
(Includes Elgin, Luray)

- Population 23,902
- # of Households 9,286
- Median Income \$51,792
- Under 18 19.8%
- Over 65 21.9%
- Female 50.5%
- White 93.6%
- Black 2.2%
- Hispanic 2.2%
- Asian 0.5%

1	Walmart (SuperCenter)	1	\$37.20	53.68%
2	Food Lion	2	\$11.40	16.45%
3	7-Eleven	3	\$7.20	10.39%
4	B. Green (Shoppers Value)	1	\$6.00	8.66%
5	CVS	1	\$4.70	6.78%
6	Circle K	1	\$2.00	2.89%
		9	\$68.50	98.85%



PORTSMOUTH CITY (\$273.5 million)

- Population 94,398
- # of Households 36,370
- Median Income \$52,175
- Under 18 23.1%
- Over 65 15.1%
- Female 52.1%
- White 37.2%
- Black 54.5%
- Hispanic 4.7%
- Asian 1.5%

1	Food Lion	5	\$72.70	26.58%
2	Kroger (Marketplace)	1	\$40.90	14.95%
3	Walmart (SuperCenter)	1	\$30.40	11.12%
4	7-Eleven	15	\$26.40	9.65%
5	Harris Teeter	1	\$23.80	8.70%
6	Military Commissaries	1	\$17.38	6.35%
7	CVS	3	\$14.90	5.45%
8	Rite Aid	3	\$12.80	4.68%
9	Walgreens	2	\$11.60	4.24%
10	Wawa	2	\$9.89	3.62%

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VIRGINIA COUNTY SHARE OF MARKET: 2021

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11	Aldi	1	\$8.10	2.96%
12	Royal Farm Stores	1	\$3.10	1.13%
		36	\$271.97	99.44%



POWHATAN COUNTY (\$73.7 million) (Includes Powhatan)

• Population	29,652	• Female	48.3%
• # of Households	10,265	• White	86.1%
• Median Income	\$89,090	• Black	9.2%
• Under 18	18.1%	• Hispanic	2.3%
• Over 65	19.0%	• Asian	0.6%

1	Walmart (SuperCenter)	1	\$37.00	50.20%
2	Food Lion	2	\$23.60	32.02%
3	Sheetz	2	\$7.60	10.31%
4	CVS	1	\$4.50	6.11%
		6	\$72.70	98.64%



PRINCE GEORGE CO. Including HOPEWELL (\$84.9 million) (Includes Prince George)

• Population	60,882	• Female	49.8%
• # of Households	20,731	• White	49.3%
• Median Income	\$55,471	• Black	38.1%
• Under 18	24.0%	• Hispanic	8.6%
• Over 65	15.1%	• Asian	1.9%

1	Military Commissaries	1	\$29.70	34.98%
2	Food Lion	2	\$21.90	25.80%
3	7-Eleven	2	\$5.30	6.24%
4	Walgreens	1	\$4.60	5.42%
5	Rite Aid	2	\$4.50	5.30%
6	CVS	1	\$4.40	5.18%
7	Save-A-Lot	1	\$4.10	4.83%
8	Sheetz	1	\$4.00	4.71%
		11	\$78.50	92.46%



PRINCE WILLIAM CO. Including MANASSAS, MANASSAS PK. (\$1.9 billion) (Includes Dale City, Quantico, Woodbridge)

• Population	528,898	• Female	49.1%
• # of Households	159,539	• White	35.0%
• Median Income	\$92,224	• Black	17.6%
• Under 18	26.4%	• Hispanic	34.1%
• Over 65	9.9%	• Asian	8.9%

1	International Markets	11	\$236.20	12.72%
2	Giant Food	7	\$218.61	11.78%
3	Wegmans	2	\$209.30	11.27%
4	Food Lion	9	\$131.60	7.09%
5	Harris Teeter	4	\$131.20	7.07%

6	7-Eleven	61	\$118.70	6.39%
7	Walmart (SuperCenter)	5	\$113.60	6.12%
8	CVS	18	\$85.10	4.58%
9	Costco	2	\$76.50	4.12%
10	Albertsons (Safeway)	4	\$74.59	4.02%
11	BJ's Wholesale Club	2	\$63.60	3.43%
12	Target (Super Target)	4	\$57.60	3.10%
13	Wawa	6	\$55.59	2.99%
14	Walgreens	9	\$55.10	2.97%
15	Military Commissaries	1	\$45.73	2.46%
16	Lidl	3	\$38.10	2.05%
17	Aldi	5	\$35.80	1.93%
18	Sheetz	9	\$34.70	1.87%
19	Sam's Club	1	\$30.60	1.65%
20	Shoppers	1	\$30.10	1.62%
21	MOM's Organic Market	1	\$12.80	0.69%
22	Circle K	2	\$4.10	0.22%
23	C&S Independents	1	\$1.09	0.06%
		168	\$1,860.31	100.21%*



RAPPAHANNOCK COUNTY (\$5.1 million) (Includes Washington)

• Population	7,370	• Female	50.8%
• # of Households	2,913	• White	88.3%
• Median Income	\$74,284	• Black	4.2%
• Under 18	16.2%	• Hispanic	4.4%
• Over 65	27.9%	• Asian	1.0%

Multi-store retailers do not operate in this county.



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

• Population	9,023	• Female	43.6%
• # of Households	3,069	• White	60.5%
• Median Income	\$49,517	• Black	29.6%
• Under 18	16.9%	• Hispanic	7.3%
• Over 65	21.1%	• Asian	0.7%

1	Food Lion	1	\$13.60	62.10%
2	Walgreens	1	\$4.30	19.63%
3	7-Eleven	1	\$2.20	10.05%
		3	\$20.10	91.78%



SHENANDOAH COUNTY (\$119.1 million) (Includes Strasburg, Woodstock)

• Population	43,616	• Female	50.9%
• # of Households	17,402	• White	87.2%
• Median Income	\$57,252	• Black	2.9%
• Under 18	21.0%	• Hispanic	7.4%
• Over 65	22.2%	• Asian	1.1%

1	Food Lion	3	\$42.50	35.68%
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VIRGINIA COUNTY SHARE OF MARKET: 2021

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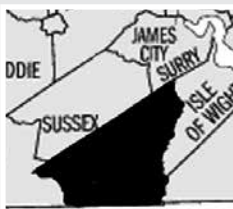
2	Walmart (SuperCenter)	1	\$35.70	29.97%
3	Walgreens	2	\$8.70	7.30%
4	Sheetz	2	\$8.60	7.22%
5	Save-A-Lot	1	\$8.30	6.97%
6	7-Eleven	5	\$7.90	6.63%
7	CVS	1	\$3.90	3.27%
8	Circle K	1	\$2.20	1.85%
		16	\$117.80	98.91%

15	Fas-Marts	11	\$15.80	2.06%
16	Publix	1	\$14.10	1.84%
17	Food Lion	1	\$12.10	1.58%
18	Royal Farm Stores	3	\$8.90	1.16%
19	Miller Marts	1	\$1.80	0.23%
		84	\$766.97	99.89%



STAFFORD COUNTY (\$428.4 million)
(Includes Aquia, Falmouth, Stafford)

- Population 152,882
- # of Households 47,075
- Median Income \$111,108
- Under 18 25.9%
- Over 65 10.7%
- Female 49.5%
- White 59.3%
- Black 20.0%
- Hispanic 14.2%
- Asian 3.6%




SOUTHAMPTON COUNTY (\$90.9 million)
(Includes Courtland)

- Population 25,598
- # of Households 10,084
- Median Income \$50,883
- Under 18 22.3%
- Over 65 20.0%
- Female 51.4%
- White 49.0%
- Black 46.1%
- Hispanic 2.4%
- Asian 0.8%

1	Walmart (SuperCenter)	1	\$41.20	45.78%
2	Food Lion	2	\$29.70	33.00%
3	7-Eleven	3	\$6.10	6.78%
4	Walgreens	1	\$4.90	5.44%
5	Rite Aid	1	\$3.00	3.33%
6	Circle K	1	\$2.30	2.56%
		9	\$87.20	96.89%


1	Giant Food	3	\$119.66	28.00%
2	Walmart (SuperCenter)	2	\$63.90	14.92%
3	Wawa	5	\$63.37	14.79%
4	Weis Markets	3	\$40.66	9.49%
5	Target	2	\$33.90	7.91%
6	Shoppers	1	\$28.20	6.58%
7	7-Eleven	15	\$26.20	6.12%
8	CVS	5	\$23.50	5.49%
9	Publix	1	\$15.30	3.57%
10	Aldi	1	\$7.80	1.82%
11	Sheetz	1	\$5.30	1.24%
12	Fas-Marts	1	\$2.20	0.51%
13	Circle K	1	\$1.90	0.43%
		41	\$420.89	98.25%



SPOTSYLVANIA COUNTY Including FREDERICKSBURG (\$767.8 million)
(Includes Spotsylvania)

- Population 165,251
- # of Households 55,198
- Median Income \$77,135
- Under 18 22.9%
- Over 65 13.3%
- Female 52.3%
- White 62.9%
- Black 20.8%
- Hispanic 10.8%
- Asian 3.0%

1	Walmart (SuperCenter)	4	\$154.30	20.10%
2	Giant Food	2	\$89.67	11.68%
3	CVS	15	\$78.40	10.21%
4	Wawa	9	\$72.91	9.50%
5	Wegmans	1	\$71.20	9.27%
6	Weis Markets	5	\$55.39	7.21%
7	Costco	1	\$31.20	4.06%
8	BJ's Wholesale Club	1	\$30.90	4.02%
9	Target (Super Target)	2	\$30.40	3.96%
10	Walgreens	5	\$23.70	3.09%
11	Lidl	2	\$20.80	2.71%
12	7-Eleven	12	\$19.10	2.49%
13	Sheetz	5	\$19.10	2.49%
14	Aldi	3	\$17.20	2.24%



SUFFOLK COUNTY (\$303.8 million)

- Population 92,108
- # of Households 33,774
- Median Income \$74,884
- Under 18 23.8%
- Over 65 14.9%
- Female 51.4%
- White 48.9%
- Black 42.6%
- Hispanic 4.7%
- Asian 1.9%


1	Kroger (Marketplace)	2	\$71.80	23.63%
2	Walmart (SuperCenter)	2	\$70.60	23.24%
3	Food Lion	5	\$50.80	16.72%
4	Harris Teeter	1	\$27.00	8.89%
5	7-Eleven	9	\$18.40	6.06%
6	Walgreens	3	\$13.90	4.58%
7	Rite Aid	3	\$12.40	4.08%
8	Aldi	1	\$10.90	3.59%
9	Lidl	1	\$8.00	2.63%
10	CVS	1	\$4.90	1.61%
11	Wawa	1	\$4.72	1.55%

See VIRGINIA COUNTY SHARE on page 125

VIRGINIA COUNTY SHARE OF MARKET: 2021

Continued from page 124

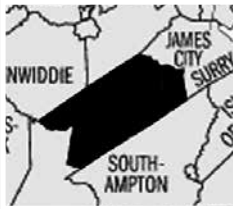
12	Circle K	2	\$3.90	1.28%
13	Miller Marts	2	\$3.80	1.25%
		33	\$301.12	99.12%



SURRY COUNTY (\$4.0 million)
(Includes Surry)

- Population 6,422
- # of Households 2,730
- Median Income \$57,962
- Under 18 16.6%
- Over 65 23.9%
- Female 50.4%
- White 53.3%
- Black 41.5%
- Hispanic 2.7%
- Asian 0.5%


1	7-Eleven	1	\$2.00	50.00%
		1	\$2.00	50.00%



SUSSEX COUNTY (\$8.1 million)
(Includes Sussex, Wakefield)

- Population 11,159
- # of Households 3,794
- Median Income \$49,487
- Under 18 15.2%
- Over 65 18.6%
- Female 40.4%
- White 38.9%
- Black 56.1%
- Hispanic 3.3%
- Asian 0.5%

1	Great Valu	1	\$4.90	60.49%
2	7-Eleven	1	\$2.60	32.10%
		2	\$7.50	92.59%




VIRGINIA BEACH CITY (\$1.7 billion)

- Population 449,974
- # of Households 170,798
- Median Income \$76,610
- Under 18 22.0%
- Over 65 14.8%
- Female 50.9%
- White 61.1%
- Black 20.3%
- Hispanic 8.5%
- Asian 7.4%

1	Food Lion	21	\$252.60	15.27%
2	Walmart (SC/Neighborhood Mkt)	7	\$229.50	13.87%
3	Harris Teeter	9	\$201.10	12.15%
4	7-Eleven	79	\$165.80	10.02%
5	Kroger (Marketplace)	5	\$149.60	9.04%
6	Wegmans	1	\$68.40	4.13%
7	Walgreens	14	\$64.10	3.87%
8	CVS	13	\$56.20	3.40%
9	Target	4	\$55.70	3.37%
10	Wawa	9	\$53.71	3.25%
11	Rite Aid	18	\$50.70	3.06%


12	Military Commissaries	1	\$46.73	2.82%
13	Sam's Club	1	\$41.20	2.49%
14	BJ's Wholesale Club	1	\$39.80	2.41%
15	Aldi	5	\$39.40	2.38%
16	Whole Foods	1	\$34.20	2.07%
17	International Markets	2	\$28.20	1.70%
18	Lidl	4	\$26.20	1.58%
19	Fresh Market	2	\$25.30	1.53%
20	Trader Joe's	1	\$18.90	1.14%
21	Miller Marts	3	\$5.40	0.33%
22	Royal Farm Stores	1	\$3.60	0.22%
23	Circle K	1	\$2.20	0.13%
		203	\$1,658.54	100.24%*



WARREN COUNTY (\$146.8 million)
(Includes Front Royal)

- Population 40,164
- # of Households 14,651
- Median Income \$69,116
- Under 18 21.6%
- Over 65 16.8%
- Female 50.2%
- White 86.0%
- Black 5.0%
- Hispanic 5.3%
- Asian 1.3%

1	The Giant Company (Martin's)	1	\$55.79	38.00%
2	Walmart (SuperCenter)	1	\$39.30	26.77%
3	Target	1	\$15.60	10.63%
4	7-Eleven	8	\$14.20	9.67%
5	CVS	2	\$7.50	5.11%
6	Aldi	1	\$7.40	5.04%
7	Royal Farm Stores	1	\$2.30	1.57%
8	Circle K	1	\$1.90	1.29%
		16	\$143.99	98.09%



WESTMORELAND COUNTY (\$49.9 million)
(Includes Colonial Beach)

- Population 18,015
- # of Households 7,923
- Median Income \$53,853
- Under 18 19.1%
- Over 65 25.6%
- Female 51.2%
- White 63.8%
- Black 26.1%
- Hispanic 6.9%
- Asian 0.9%

1	Food Lion	2	\$27.40	54.91%
2	Walgreens	2	\$8.70	17.43%
3	Great Valu	1	\$6.00	12.02%
4	7-Eleven	2	\$4.40	8.82%
5	Fas-Marts	1	\$2.10	4.21%
		8	\$48.60	97.39%

See VIRGINIA COUNTY SHARE on page 126

AISLE chatter

from page 4

as coffee, tea and seafood in-store for purchase. Great job, TGC!

Also stepping up its game in its company-wide efforts to encourage and practice sustainability is sister banner, Giant Food. In partnership with the Maryland Energy Administration (MEA) and Volta Industries, Inc. (Volta Charging), an industry leader in commerce-centric electric vehicle (EV) charging networks, the Landover, MD based retailer now has complimentary charging stations situated at several of its retail locations across Maryland. By incorporating marketing messaging on the charging station's screens, the public is able to uti-

lize the chargers at no cost. This milestone in Maryland illustrates how state and local governments can successfully work with private entities to support the networked charging infrastructure necessary to enable the growing adoption of EVs.

"We now have 74 Volta kiosks installed at Giant Food locations across our market area," said **Ira Kress**, president of Giant Food. "As part of our continued sustainability commitments, we are furthering our actions to reduce carbon emissions through our business practices and key partnerships. We are happy to partner with Volta to provide on-site charging options for our EV customers, and a quick, convenient, and complimentary service that supports their personal efforts to live more sustainably."

"This public-private partnership with Volta Charging and Giant is yet another testament to Maryland's standing as a na-

tional leader in transportation electrification," stated Maryland Governor Larry Hogan. "Expanding access to electric vehicle charging infrastructure is critical to achieving both our emissions reduction and EV deployment goals, while serving the needs of Marylanders and visitors alike."

And, while as Alice Cooper sang, "School's out for summer," Harris Teeter works year-round to help support its area school systems. The Matthews, NC-based grocer announced a donation of \$596,845 to local schools participating in its Together in Education (TIE) program, the fundraising program for schools within its communities. This is the program's third of three payouts for the current school year, bringing the year's total payout to more than \$1 million. During this payout, 3,811 schools will receive a check from Harris Teeter. Active participation by

both TIE schools and loyal Harris Teeter shoppers is integral to the success of the program, allowing schools to earn funds through shopper purchases. Shoppers are encouraged to link their VIC card to the school or schools of their choice (up to five schools), so schools can earn funds based on purchases of select Harris Teeter brands. There are no limits to how much a school can earn. The program which was founded in 1998, has allowed the company to donate more than \$31 million to participating schools.

The Kroger Co. subsidiary also announced the launch of its "Backpack Boosters Round Up" campaign this month to help provide nutritious meals and school supplies to children-in-need. From June 16 through August 24, shoppers are invited to round up their transaction to the nearest whole dollar to support this effort. The funds collected through the fundraiser will benefit one of two causes: either local food bank backpack programs which provide nutritious meals and snacks to families-in-need across Harris Teeter's operating area or Charlotte, NC's own Classroom Central, which equips students-in-need to effectively learn

by collecting and distributing free school supplies to teachers across six school districts and nearly 200 schools.

"While many families look forward to weekends, there are many children who leave school on Friday afternoon not knowing when they'll receive their next meal," said **Danna Robinson**, communication manager for Harris Teeter. "With generous contributions from our associates and shoppers to support our local food bank partners' backpack programs, we can help those children and their families who are facing food insecurity." Robinson continued, "The inclusion of Classroom Central is essential to round out our Backpack Boosters program. This partnership will provide teachers and students access to free school supplies to ensure they are equipped with the resources needed to be successful throughout the school year."


Kudos to HT for putting the emphasis on schools and their needs not just when they are in session, but throughout the entire year.

Until next month...

Karen can be contacted via email at karen@foodtradenews.com.

VIRGINIA COUNTY SHARE OF MARKET: 2021

Continued from page 125



YORK COUNTY Including POQUOSON (\$179.8 million) (Includes Yorktown)

- Population 68,280
- # of Households 25,103
- Median Income \$92,069
- Under 18 19.1%
- Over 65 16.6%
- Female 50.9%
- White 70.1%
- Black 13.8%
- Hispanic 6.9%
- Asian 6.1%

1	Food Lion	4	\$48.80	27.14%
2	Kroger	2	\$43.00	23.92%
3	Walmart (SuperCenter)	1	\$38.70	21.52%
4	Wawa	2	\$11.37	6.32%
5	Walgreens	2	\$10.70	5.95%
6	7-Eleven	5	\$10.20	5.67%
7	Rite Aid	2	\$7.70	4.28%
8	CVS	1	\$4.50	2.50%
9	Royal Farm Stores	1	\$2.60	1.45%
10	Circle K	1	\$2.00	1.11%
		21	\$179.57	99.87%

() 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 2021

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



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

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FOOD BANK

Thank you. ♥

The COVID-19 pandemic has impacted homes everywhere, changing lives and daily rhythms for families across Maryland. And it's far from over.

Help us continue to respond to the surge in need for food assistance. Consider donating food today so we can ensure that Maryland's seniors, children, and families don't go hungry during this challenging time.

**Call our food sourcing manager today at
410-926-7886 or 410-737-8282 to help.**

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