Food World

WWW.FOODTRADENEWS.COM

Vol. 78 No. 6 MARKET STUDY ISSUE June 2022

TAKING STOCK

by Jeff Metzger

Inflation, In-Stock Conditions Were Key Components For Retailers' Success

Some of the same factors that helped create record sales from mid-2020 to mid-2021 were still in place over the past 12 months. Due to the creation and availability of vaccines, consumers began to return to in-store shopping but overall top line sales remained robust as in-home eating continued to be the norm. And even with more brick-and-mortar revenue business returning, e-commerce sales were still strong (particularly curbside pickup) as retailers remained pleasantly surprised that the tailwinds of the previous year continued.

Even with the continuation of strong sales, many retailers sensed that there were a few differences from several months earlier that concerned retail operators. The supply chain breakdown, which derailed quickly when COVID

See **TAKING STOCK** on page 6

Giant, WM, CVS, Food Lion, Albertsons Top Leaderboard

Fueled By Inflation, Retailers Maintain Strong Sales Results

Retailers in the $57 billion Mid-Atlantic retail food market followed a record sales year in the region with a surprisingly robust 12 months again as inflation helped spike revenue for the second year in a row.

A year ago, when we reported volume totals from the nearly 60 multi-store retailers in the 89 counties that encompass the *Food World* marketing area, the impact from the COVID-19 pandemic created unprecedented sales tailwinds as consumers remained at home and in-home meal consumption soared.

And in the period from April 1, 2021-March 31, 2022, sales remained strong, but for some slightly different reasons. Sure, the continuing effects and impact of COVID remained, which caused a continuation of hoarding product that was first seen in the early months of the pandemic in the spring of 2020. However, the catalyst behind hoarding groceries this time seemed driven more by the breakdown of supply chains over the past nine months, which led to product shortages.

And then there was inflation, which really was the primary reason retailers continued to produce record or near-record sales following a year when all previous sales records were broken. Over the past 12 months, the inflation rate in the U.S. rose to about 8 percent; price hikes in the grocery sector - fueled by labor shortages (leading to increased wages), raw materials and commodity challenges and production shortfalls – drove that number to above 10 percent.

As one senior executive at a Mid-Atlantic based regional chain said: "We're selling more stuff and making more profit with 70 percent in-store service levels than in normal times where our service levels never dipped below 95 percent."

That retailer and many others acknowledged that trend won't last and sets up a potentially onerous scenario if inflation continues to rise and supply chain flow doesn't improve.

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

See **MARKET STUDY** on page 102

THE INTERNATIONAL DAIRY-DELI-BAKERY 2022 SHOW WAS HELD earlier this month at the Atlanta World Congress Center. Among the retailers from the *Food World* marketing area attending were Giant Food's Madeline Mollahan (l), Derek Shackford (c) and Cindy Volk. More photos are on page 73.

Amazon Fresh Slow Opening Pace Quickening With 3 NoVA Debuts

Thirteen-months ago, when the first Amazon Fresh opened in the Washington area (Franconia, VA), there was a lot of anticipation that the market would see an acceleration of ribbon cuttings from parent company Amazon's differentiated brick and mortar model. That clearly hasn't been the case as only three other stores – 14th Street NW/Logan Circle in Washington, DC (July 2021); Chevy Chase, MD (August 2021); and Fairfax, VA (April 2022) – have opened since Amazon Fresh's Franconia debut.

Now it seems Amazon Fresh is finally beginning to open more

See **AMAZON** on page 99

Carl Greeley, owner of Geresbeck's stores in Baltimore, passed away last month at the age of 92.

Greeley was born and raised in Baltimore. He attended school in the city but dropped out at age 16 to help support his family. He learned meatcutting at a local market before joining his future father-in-law at C&G Market in the city. There he trimmed and cut meat and met his future wife, Josephine Capizzi, whom he married in 1951.

Later, Greeley became a manager for Food Fair, the now-defunct Philadelphia-based supermarket operation. When those stores later became Pantry Prides, Greeley ran the company's Joppa Road store.

In 1971, Greeley had the opportunity to become a store owner, buying his first location in Orchard Beach. That store was a former independently-owned Eddie's Market.

Greeley named the store Carl's Bi-Rite; the Bi-Rite banner was used by independently-owned supermarkets.

In 1979, he founded Box N Save and he owned stores under that name in Pasadena, Glen Burnie, Brooklyn Park and on Liberty Road.

In 1985, Greeley bought the Geresbeck's stores in eastern Baltimore County.

Greeley remained active in the business for many years. In 2019 he purchased the Pasadena location of Lauer's and renamed it Geresbeck's, adding it to the two other Geresbeck's and giving the company three locations.

Greeley is survived by his wife of 71 years; daughters Rose Kenzora (John), Carole Bateman (Bill), Gloria Wiessner (Bill) and Joanne Graham (Jerry); brothers C. Joseph Greeley and R. William Greeley; 10 grandchildren, 15 great-grandchildren and one great-great granddaughter.

In lieu of flowers, donations may be made to St. Jude Children's Research Hospital at stjude.org.

utz SUMMER Essentials
Drive Summer Sales with UTZ®
For a limited time, consumers have the chance to WIN fun Summer gear from UTZ®!
Family SIZE
utz Ripples Original
Hungry SIZE
utz Original POTATO CHIPS
NET WT 7.75 OZ (219.7g)
utz Honey Barbeque
You Could WIN Utz Summer Gear
Grow potato chip sales with UTZ®, outpacing the category 2x with +22% growth in the latest 24 weeks*
Utz Brands, Inc.
900 High Street, Hanover, PA 17331
1-800-FOR-SNAX
utzsnacks.com
@UtzSnacks
@UtzSnacks
@UtzSnacks
*SOURCE: IRI TOTAL US MULO+C L24WK ending 5.15.22

AISLE chatter

By Karen Fernandez

In the ever-evolving world of grocery, industry rollups seem to be the way of the world. Whether it is one of the retailers, distributors, brands, or even brokers, it seems like there's always a story about one of the newer, niche companies being acquired by one of the larger, established ones. While rollup strategies have been the way of the business world for quite some time, often times these bolt-on acquisitions can unintentionally cause the ancillary entity to lose a lot of the qualities that gave them their unique (and consumer-appealing) identities in the first place. However, lately, companies have been showing us that we don't always have to subscribe to the "eat or be eaten" ideology.

In fact, more often than not, collaboration is the key to success. And an increasing number of brands are subscribing to that mindset by developing brand partnerships. There's even a typographic symbol often used to denote these collabs (x) which makes them super social media tag-friendly. Designers in the fashion world have been doing it for years but it now seems that the food industry has caught on to the potential benefits it can offer for both participating parties. Often times, it's for limited run items, but every now and again, one of these marriages results in lightning being caught in a bottle, which leads to its temporary stay in the marketplace being extended to a more permanent placement.

Coca-Cola is the latest one in the news to launch, in partnership with spirits and wine manufacturer Brown-Forman, a co-branded canned alcoholic cocktail, simply dubbed Jack Daniel's & Coca-Cola. The sleek looking can will look much like the easily recognizable label of the iconic whiskey brand, but with the Coca-Cola logo emblazoned in red below the white font of the Jack Daniels one.

The ready-to-drink beverage, which will have a global benchmark of 5 percent alcohol beverage volume (ABV), will have its initial launch in Mexico in late 2022 and will then be sold globally. The U.S. release is a little further down the road in 2023. A zero sugar version will also be available.

"This relationship brings together two classic American icons to deliver consumers a taste experience they love in a way that is consistent, convenient, and portable," said Brown-Forman CEO and president **Lawson Whiting**. "Brown-Forman has been a leader in the ready-to-drink category since we launched our first Jack Daniel's RTD more than 30 years ago. Coca Cola perfectly complements Jack Daniel's and our existing RTD offerings, enabling us to accelerate expansion and continue to grow our business around the world."

"We keep consumers at the center of everything we do as we continue to develop our portfolio as a total beverage company, and that includes new products with our iconic Coca Cola brand," said **James Quincey**, chairman and CEO of The Coca Cola Company. "We are excited about our new relationship with Brown-Forman and look forward to the introduction of Jack Daniel's & Coca Cola."

Two other industry giants that also recently joined forces are Campbell Soup and McCormick & Company, which together introduced a limited edition Old Bay Seasoned Goldfish in May. The aquatic pet-shaped snacks sold out online in nine hours (in spring of last year the two manufacturers partnered up to launch Frank's Red Hot Goldfish crackers, which ended up being the fastest selling cracker launch of 2021).

Oreo teamed up with Barefoot Wine last December and launched a special limited edition Barefoot x Oreo Thins red blend wine just in time for the holiday season. The small batch release, which according to the two companies, included "flavors of chocolate and cookies and creme along with notes of oak," was available to order exclusively on Barefoot Wine's website and consisted of two 750ml Barefoot x Oreo Thins Red Blend Wine and one package of Oreo Thins cookies. It sold out immediately.

And it's not only big industry conglomerates that are finding success by working together. Boutique creamery Van Leeuwen, which started out in 2008 as a yellow truck selling artisanal ice cream in the streets of NYC, partnered up with Kraft in the last year to produce a limited run Kraft Macaroni & Cheese ice cream that was so successful that, not only did it sell out of the 6,000 pints produced for the general public within one hour of going on sale online, but the Brooklyn-based creamery (which added more product for sale one month after its initial launch) brought the highly requested flavor back this past March for sale during a 10-week rotation period with six other specialty flavors at 3,500 Walmart store locations and online.

Other interesting food brand collaborations that have gone to market include, Taco Bell Doritos tacos (in both nacho cheese and cool ranch-flavored shells), the Pringles Wendy's Baconator potato crisps, and Mountain Dew x Cheetos Flamin' Hot soda. Also, collaboration for food brands doesn't always have to be about two edible mashups. Sometimes, it's all about taking two otherwise unrelated products and bringing them together simply for the marketing exposure and limited edition appeal they offer.

Look at Mentos x Sally Hansen, Kentucky Fried Chicken x Crocs, and Super Coffee x Poo-Pourri (yes, Poo-Pourri, the bathroom odor elimination spray!). Sometimes the weirder and wackier, the better (for publicity that is). The odd coupling concept has been proven to get shoppers, press and publications, and especially social media buzzing about a product, even if there is no chance for long-term success of the item itself and that is a marketing ploy that can pay returns in not just tenfold, but sometimes even thousandfold if done correctly.

It doesn't even need to be about mixing two products to make one that stands separately on its own. Utz partnered with Ferrara (a subsidiary of the Ferrero Group) this year to create a Sweet & Salty Mix snack variety pack in different sized options which include individually-packed sweet snacks from Ferrara and salty munching treats from Utz, such as cookies, pretzels, and cheeseballs which can be eaten separately or at the consumer's discretion, mixed together to create the perfect balance of the two senses of taste.

"Through the snack variety packs we mutually create, we'll place tens of millions of Utz Brand packages into the hands of consumers across the United States, further accelerating the geographic expansion of Utz Brands. When consumers try our snacks, they repeat purchase at high rates, and we look forward to the exposure and incremental brand trial this

See **AISLE CHATTER** on page 99

Food World

WWW.FOODTRADENEWS.COM

PUBLISHED THE FIRST MONDAY OF EACH MONTH
By Best-Met Publishing Co., Inc.
Publishers of
Food World
and Food Trade News

Jeffrey W. Metzger
President/Publisher

Terri Maloney
VP/Editorial Director

Maria Maggio
VP/GM-Food Trade News

Kevin Gallagher
VP/Food Trade News

Karen Fernandez
Director of Marketing/Digital Strategist

Beth Pripstein
Circulation Manager

Richard J. Bestany
Chairman Emeritus

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

TAKING STOCK

From page 1

impacted many businesses in late Q1 and Q2 in 2020, was actually getting worse. Unlike the beginning of the pandemic when certain products/categories simply disappeared from the shelves or other items were only available in limited varieties, now more products across the spectrum of the entire store were not available. If service levels were in the low 80 percent range during the early period of the pandemic, they had now dipped to the mid-60s to low 70s percent range.

And price increases were coming at an unprecedented rate as all segments of the supply chain dealt with labor shortages which triggered a host of other problems. And COVID would still remain a factor as the Delta and Omicron variants contributed to a spike in positive cases and a return to caution for many Americans.

Still, food retail sales were very good, aided by the fact that some schools hadn't returned fully to in-person learning and restaurants, while performing better than 2020 and early 2021, were still struggling.

Which brings us to today, when retailers live in a world where unit sales are down (from a year ago) but the rampant inflation rate (11.9 percent overall during May and even higher when measuring food products alone) has kept their top line numbers strong. And even though some parts of the supply chain have improved in areas such as commodity and raw materials availability, the system remains highly dysfunctional and unpredictable.

Even many of those who predicted six months ago that inflation would abate and distribution patterns would return to more normal levels by the end of 2022 no longer see that as a reality. And what's worse is that over the past two months retailers are seeing the first signs that inflation might not be their friend for very much longer as consumers have begun trading down and a potentially worse economic environment or even a recession is possible.

We'll be charting that course in the 2023 market study; this year's differential when comparing retailers against each other was largely determined by who maintained better in-stock conditions. That was an overall industry challenge, but one which some retailers executed better than others.

So, as I've done since 1979, here's my take on the market leaders in the core Baltimore-Washington market.

TAKING STOCK continues on page 18

2022 FOOD WORLD MARKET STUDY INDEX

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.

Over the last 12 months, the number one factor influencing all sales data has been inflation, which actually began in late 2020, but has spiraled to unprecedented levels over the past nine months. And higher prices translated to higher sales both at the store level and in the overall county-by-county spending for retail food.

So, while county retail sales were at the highest in the 44 years we've been publishing this Market Study, there were still 11 counties in the region where collective revenue from those retailers operating stores in those locales exceeded the overall per capita retail food sales for those counties.

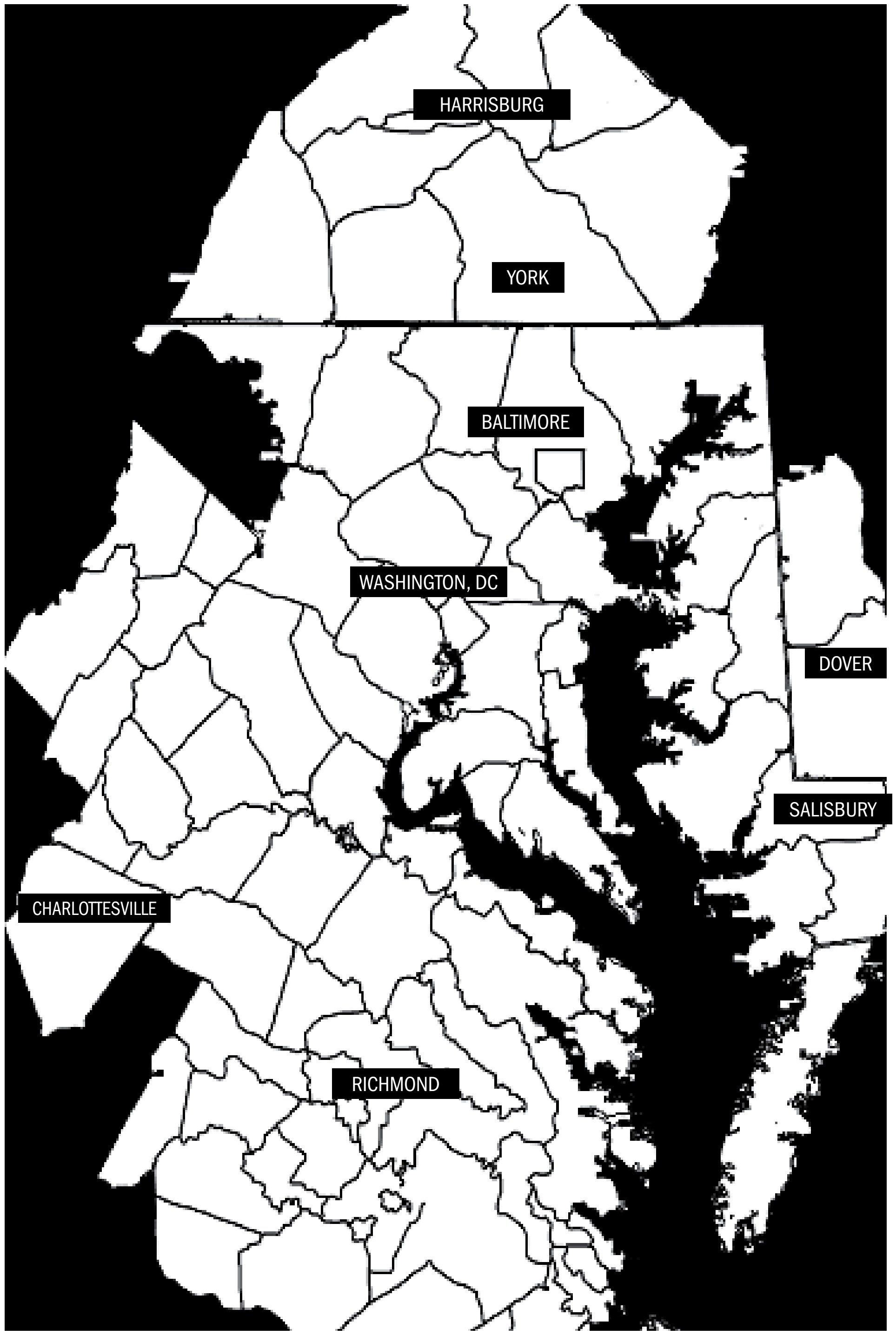
There is an explanation for this: the term is called leakage and simply means that consumers in other counties or cities actually "spill in" and shop in supermarkets, club stores, drug stores, c-stores and units operated by mass merchants in these more densely populated adjacent jurisdictions. Remember,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

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

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

Why are some percentages lower than others?

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




SCHMIDT
Old Tyme
From Grill to Greatness.
Old Tyme
POTATO ROLLS
8 LONG
Old Tyme
GAMEDAY
PREMIUM LONG ROLLS
Old Tyme
POTATO ROLLS
8 SANDWICH
Old Tyme
GAMEDAY
PREMIUM SANDWICH ROLLS

FOOD WORLD'S LEADING CHAIN STORES: 2022

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, Target and Walmart are listed as well. Sales for club stores, Target and Walmart are extrapolated to include comparable supermarket departments - as explained on page 85. Petroleum sales are not included. **Total sales of retail grocery, drugs, HBC, general merchandise and tobacco products in the Mid-Atlantic area are $57.1 billion**.

Rank	Company	Stores	2022 Sales (in millions)	2022 % of Area Market
1	Giant Food	160	$6,040.61	10.58%
2	Walmart (SC/Neighborhood Mkt.)	160	$5,723.50	10.02%
3	CVS	638	$3,629.20	6.36%
4	Food Lion	255	$3,290.40	5.76%
5	Albertsons (Acme/Balducci's/Safeway)	124	$3,205.31	5.61%
6	The Giant Company (Martin's)	63	$2,884.13	5.05%
7	Harris Teeter	78	$2,396.50	4.20%
8	7-Eleven	1,088	$2,202.90	3.86%
9	Target (Super Target)	111	$2,053.70	3.60%
10	International Markets	137	$2,036.30	3.57%
11	Wegmans	23	$2,002.90	3.51%
12	Weis Markets	97	$1,929.93	3.38%
13	Costco	30	$1,898.80	3.33%
14	Walgreens	323	$1,839.20	3.22%
15	Whole Foods (Amazon Fresh)	37	$1,365.80	2.39%
16	Kroger (Marketplace)	38	$1,298.20	2.27%
17	Wawa	177	$1,234.19	2.16%
18	Aldi	137	$1,128.40	1.98%
19	Sam's Club	26	$1,065.50	1.87%
20	BJ's Wholesale Club	29	$1,059.90	1.86%
21	Trader Joe's	30	$748.80	1.31%
22	Rite Aid	182	$646.60	1.13%
23	Royal Farm Stores	233	$619.90	1.09%
24	Sheetz	153	$599.80	1.05%
25	Shoppers	20	$566.50	0.99%
26	Lidl	57	$455.40	0.80%
27	ShopRite (Price Rite)	16	$445.40	0.78%
28	Military Commissaries	20	$421.72	0.74%
29	C&S Independents	98	$401.40	0.70%
30	Publix	19	$290.50	0.51%
31	Redner's Markets	13	$282.60	0.49%
32	MOM's Organic Market	16	$241.60	0.42%
33	Save-A-Lot	35	$215.30	0.38%
34	The Fresh Market	16	$197.00	0.35%
35	Turkey Hill	117	$177.20	0.31%
36	Fas-Marts	98	$169.20	0.30%
37	Rutter's Farm Stores	70	$139.30	0.24%
38	Sprouts	6	$109.70	0.19%
39	High's/Baltimore	54	$95.10	0.17%
40	Dash-In	45	$89.00	0.16%
41	Great Valu	9	$81.50	0.14%
42	Grocery Outlet	10	$63.20	0.11%
43	Circle K	30	$62.50	0.11%
44	IGA	6	$60.32	0.11%
45	Giant Eagle (GetGo)	4	$40.40	0.07%
46	Miller Marts	19	$39.00	0.07%
47	ASG (Compare)	5	$21.17	0.04%
48	America's Food Basket (Ideal)	1	$7.70	0.01%
	GRAND TOTAL	**5,113**	**$55,573.18**	**97.33%**

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

Source*: Food World,* June 2022

FOOD WORLD MARKET STUDY 2022: RULES & ANALYSIS

Inflation. It's a word that food retailers welcomed in the past, that is, when wholesale prices increases were modest and the economy was good. But over the past 12 months, while higher prices have provided merchants with the level of comparable store gains thought to be not achievable after record COVID-related sales last year, retailers are concerned that unabated inflation will soon lead to a very challenging economic environment, perhaps even a recession.

In one sense it was logical to see why the period from April 2020 to March 2021was so robust for food retailers. The pandemic, which has sadly claimed more than one million American lives to date, forced people to eat at home. A byproduct of the lockdown was that consumers bought more food online and in stores than ever before. Even with such key items as sanitizing products and paper virtually non-existent on the shelves and many manufacturers producing a limited variety of their lines, consumers began hoarding products, worried that they might soon be unavailable, but also knowing that virtually all their meals would be eaten at the kitchen table.

Even as in-stock conditions began to improve and some of those long-term out-of-stock items ultimately returned, we began seeing significant and frequent price increases emerge about a year ago.

Of course, most of those price hikes were related to COVID and/or the effects of doing business during the pandemic. The labor shortages (truck drivers, manufacturing workers, warehouse employees, clerks and meatcutters) became severe during COVID and continued when the worst of the pandemic seemed behind us. Those labor shortages ultimately led to the availability of raw materials and commodities to become in short supply and ultimately highly in demand. And the cost of trying to find capable employees to replace those who left became an expensive task. Two years ago, retailers were still pushing back on paying their store level associates $15 an hour; now it's a challenge to find a store clerk who makes less than $18 an hour.

And while the skyrocketing cost of fuel is now the number one economic concern for American consumers, rising grocery prices are their second most worrisome issue. Food prices have risen more than 10 percent year-over-year, with meat and seafood costing about 15 percent more than 12 months ago. And there seems to be no end in sight. However, we are beginning to see some early signs of trading down, a potential indicator that consumers can't or won't be able to afford a prolonged period of continuing price increases.

As noted earlier, while service levels began to improve about a year ago, within a few months, in-stock conditions began to quickly deteriorate. Today, the service levels at most retail stores are slightly above 70 percent. Many stores have huge holes on their shelves, vaster than even when COVID created an early chaotic environment. And unlike those early months of the pandemic, it's not just a handful of categories that are affected, it seems like the out-of-stocks are spread throughout the store.

While most retailers had surprisingly good years, some merchants stood above the others. This year's study shows stellar performances from Costco, Target and Wawa – all non-supermarket entities – as well as Trader Joe's, a somewhat less-than-traditional supermarket operator. However, there were some traditional supermarket retailers whose comp stores sales were very healthy, including Weis Markets, Wegmans and Albertsons (Safeway, Acme, Balducci's). And other non-traditional retailers such as Aldi and Walmart (and Sam's Club) posted better than industry average comps. As it's been for the past few years very few new stores opened as retailers deployed their capital on remodelings and e-commerce initiatives. The exceptions were Aldi and Lidl, both extreme value merchants looking to expand their geographies, and Wawa and Royal Farms, two convenience store merchants that opened locations in new marketing areas.

There was one major new entrant into the market – Amazon Fresh (AF) – which debuted in the Mid-Atlantic in May 2020 and now operates three stores in the Washington, DC market (with about a dozen more locations on the way). Most trade analysts were underwhelmed by AF's presence. And if merchandising acumen, operational discipline and sales volume are deemed to be important, I would also give Amazon's first start-up grocery division a mediocre score. Still, we're dealing with "Godzilla," a company seemingly indifferent to early setbacks and challenges. And as some observers have pointed out – maybe the whole idea behind AF was to create additional hubs for the company's core e-commerce business. Perhaps, but it's clear that "Godzilla" still has a lot to learn about running brick and mortar grocery stores.

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

Baltimore-Washington

Even though its share slipped a bit in the large $33.2 billion marketing area, the 60 year domination of Giant Food continues. By the numbers that means that Giant's current market share (17.3 percent) is nearly double that of its nearest competitor Albertsons (Safeway, Acme, Balducci's), and the Ahold Delhaize USA (ADUSA) brand shows no signs of imminent weakness. Much like other markets in the entire Mid-Atlantic region, the B-W area saw very few store openings (save for a few ribbon cuttings from previously closed Shoppers' stores bought by other retailers or new units replacing older stores). However, here were a few exceptions including the opening of six new "International Markets" (specialty and ethnic stores encompassing at least 20,000 square feet). Also expanding their bases were extreme discounter Aldi (which added five new stores) and Amazon which opened two Whole Food Markets and three underwhelming AF stores (three more AF markets opened in Northern Virginia this month, after our measuring period closed). While e-commerce has become an increasingly important factor for most retailers, it doesn't appear that any major changes are ahead in a market people often call "recession proof."

Eastern Shore

There's Walmart and there's Food Lion. And then there's everyone else. The two market leaders accomplish their objectives in starkly different manners. The "Bentonville Behemoth," with only 14 stores (almost all SuperCenters) scattered throughout the 12-county Delmarva Peninsula, attracts a large amount of traffic and rings up huge sales to account for its 16.4 percent market share. Food Lion, currently the best producer in the ADUSA brand lineup, serves as a traditional supermarket in many small towns that comprise a large part of the $2.9 billion marketing area. Albertsons (Acme, Safeway) maintained its third-place position and Giant Food, with only four stores on the Eastern Shore, is still ranked fourth among all retailers that sell food. Additionally, there was very little new store activity as only Wawa (one store), Royal Farms (two new units), Aldi (one store), and 7-Eleven (two new units) celebrated ribbon cuttings.

Central Pennsylvania

Nobody continued to dominate its backyard like The Giant Company. The high-volume ADUSA brand now controls one-third of all food and drug business in the eight-county market when measured against all trade channels and now leads second-ranked Weis Markets by more than 20 share points in the $7 billion area. And it's not like Weis had a bad year. In fact, the Sunbury, PA regional chain enjoyed very strong comp store revenue at its 38 stores and also increased its market share. For many other retailers in the region, sales were flat to slightly negative and there was very little new store activity. The exceptions were Karns, which added the former Mutzabaugh's Family Market in Duncannon (Perry County) to its roster, and Central PA c-stores staples Turkey Hill and Rutter's also opening new stores. The Central PA market is one that will likely see little change in years ahead, especially since Walmart, which helped reshape the market landscape in the 1990s and early 2000s, is unlikely to build new stores in the near future.

Richmond

For years, Richmond was the center of tumultuous activity with new retailers anxious to enter one of the few growth markets in the Mid-Atlantic, but new store activity has pretty much abated. However, the capital of the Old Dominion remains as competitive and overstored as any in the entire region. Walmart slightly increased its lead over second-ranked Kroger (Marketplace) on the strength of better same store sales, but both retailers as well as Food Lion are locked in a tight race for market leadership. And unlike in past years when a high-volume retailer such as Publix could be counted on to open at least one new Richmond area store, that was not the case over the last 12 months as retailers continued to adjust to the new COVID-influenced "normal." In fact, the only new store activity in the $4.26 billion market came from discounter Aldi and c-store merchants 7-Eleven and Sheetz. Based on comp sales, the two best performers in the Richmond market over the past 12 months were club king

See **RULES & ANALYSIS** on page 85


12 OZ. SLEEK CANS
MONSTER ENERGY
ORIGINAL
ZERO ULTRA
ZERO SUGAR
NOW IN 6 PACKS


TRUE NORTH
PURE ENERGY SELTZER
PLANT-BASED CLEAN ENERGY
ZERO
ARTIFICIAL FLAVORS - COLORS
SUGAR - SWEETENER - CALORIES
BLACK CHERRY
CUCUMBER LIME
WATERMELON MIST
TO LEARN MORE, PLEASE CONTACT:
TIFFANY BROCK AT (520) 482-9103 OR TIFFANY.BROCK@MONSTERENERGY.COM

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.

Ahold Delhaize USA
1385 Hancock St.
Quincy, MA 02169
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

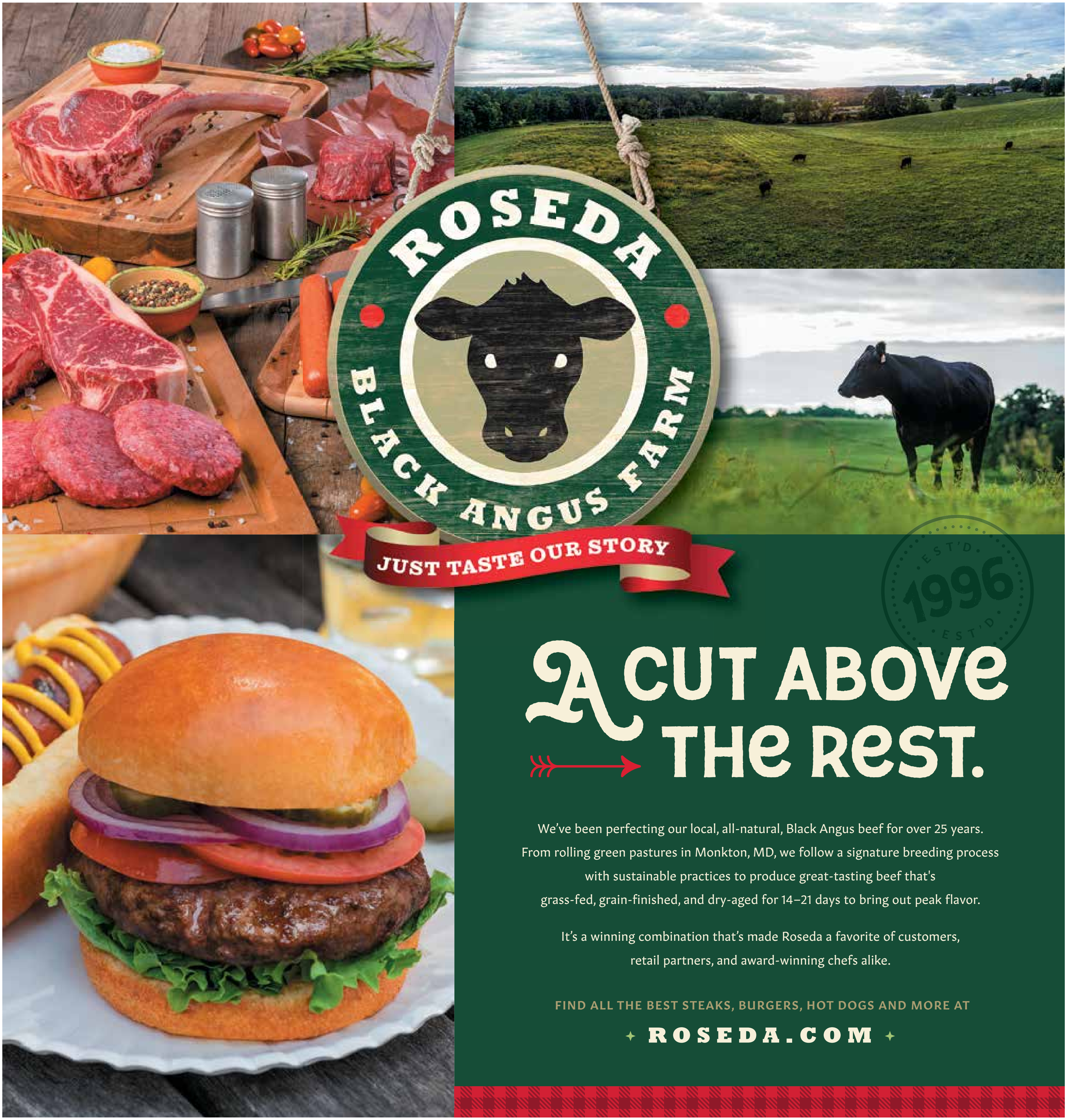
Albertsons Companies
Mid-Atlantic Division
75 Valley Stream Pkwy.
Malvern, PA 19355
Phone: (610) 889-4000
Web: acmemarkets.com, safeway.com, kingsfoodmarkets.com, balduccis.com
Pres.: Jim Perkins
SVP-Merch./Marketing: Tom Lofland
SVP-Ops.: Bill Crosby
VP-Merch./Mktg.: Jim Thatcher
VPs-Ops.: Brad Spooner, Rena Shiles, Tom McNerney
VP-HR: Kimberly Hilser
Dir.-Ops: Mike Styer
DMs: Chrissy Pratt, Chris Sanchez, rendan Murphy, Kevin Reger, Kristan Lewis, Johnathon Simmons, Matt Juhring, John Toomey, Jonathan Cruz, Richard O'Neal, Ed Tippett, Phil White, Lori Valenzuela, Frank Cardosa, Theresa Farello
Dir. Merch and Marketing: Sherry Caldwell
Dirs.-Merch.: Jay Habben, Arthur Goncalves
Sales Mgrs.-Own Brands: Anne Marie Mozzone, Matt Merville
Sales Mgrs.-Grocery: Pat Hildebrand, Jared Labar
Sales Mgr.-GM/HHB: Amber Armstrong
Sales Mgrs.-Liquor: Tim Ley, John Coleman
Sales Mgrs.-Produce: Ricardo Dimarzio, Joe Lerario
Sales Mgrs.-Meat: Mike Salisbury, Richard Michener
Sales Mgr.-Seafood: Charlie Bell
Sales Mgrs.-Bakery: Christine Hixon, Michele Tuscano
Sales Mgrs.-Deli: Angie Marshall, Matthew Nangle
Sales Mgrs.-Floral: Katie Vasquez, Michelle Edwards
Sr. Dir.-Catering: Jennifer Fouts
Sr. Dir.-Finance: Randy Weist
Dir.-Loss Prevention: Joe Conway
Dir.-Construction: Shawn Dekker
Dir.-Customer Service: Marianne Nice-Trionfo
Dirs.-Pharmacy: Amir Masood, Janis Levit
Dir-HR: Sloan Nichols
Dir-Labor Rel.: Joan Williams
Dir.-Food Safety: James Walden
Dirs.-E-Commerce: Alicia Bell, Betsy Gavigan
Corporate offices:
250 Parkcenter Blvd.
Boise, ID 83706
Phone: (208) 395-6200
Pres./CEO: Vivek Sankaran
Web: Albertsons.com
Primary Supplier: Direct
Area Stores: 124 (Includes Acme, Balducci's, Safeway)
Area Vol.: $3.21 billion

Aldi, Inc.
1200 N. Kirk Rd.
Batavia, IL 60510
Phone: (630) 879-8100
Web: aldi.com
CEO: Jason Hart
Co-Pres.: Charles Youngstrom, David Behm, Brent Laubaugh
Primary Supplier: Direct
Area Stores: 137
Area Vol.: $1.13 billion

America's Food Basket
1979 Marcus Ave., Ste. 216
New Hyde Park, NY 11042
Phone: (516) 502-2509
Web: afbasket.com
CEO: David Siegel
COO: Daniel Suriel
Primary Supplier: UNFI
Area Stores: 1 (Includes Ideal)
Area Vol.: $7.7 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
Primary Supplier: C&S Wholesale Grocers
Area Stores: 5
Area Vol.: $21.17 million
**This is the advertising and marketing*

See **DIRECTORY** on page 16


ROSEDA
BLACK ANGUS FARM
JUST TASTE OUR STORY
EST'D 1996 EST'D
A CUT ABOVE THE REST.
We've been perfecting our local, all-natural, Black Angus beef for over 25 years.
From rolling green pastures in Monkton, MD, we follow a signature breeding process
with sustainable practices to produce great-tasting beef that's
grass-fed, grain-finished, and dry-aged for 14–21 days to bring out peak flavor.
It's a winning combination that's made Roseda a favorite of customers,
retail partners, and award-winning chefs alike.
FIND ALL THE BEST STEAKS, BURGERS, HOT DOGS AND MORE AT
ROSEDA.COM

DIRECTORY OF RETAILERS

From page 14

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
Area Stores: 11 (Includes Food Depot/ Green Valley Market/Shoppers Value)
Area Vol.: $213.85 million

Boyer's Markets
301 S. Warren St.
Orwigsburg, PA 17961
Phone: (570) 366-1477
Web: boyersfood.com
Pres.: Dean Walker
CFO: Matthew Kase
EVP-Sales/Mktg.: Anthony Gigliotti
EVP-Ops: Mike Zmitrovich
Dir.-HR: Ann Marie Blashock
Meat Merch.: Joseph Cutrona
Produce Merch.: Michael Bush
Deli/Bakery/Seafood Merch.: Mellisa Erickson
Non-Perishable Merch.: Jeff O'Neill
Primary Supplier: UNFI
Area Stores: 1
Area Vol.: $11.18 million

C&S Independents
336 East Penn Ave.
Robesonia, PA 19551
Phone: (610) 693-3161
Web: cswg.com
Primary Supplier: C&S Wholesale Grocers
Area Stores: 98
Area Vol.: $401.4 million
**C&S Independents are comprised of the independent supermarkets serviced by C&S Wholesale Grocers and supplied from its Robesonia, PA headquarters.*

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

Family Owned Markets
951 Roherstown Rd., Unit 201
Lancaster, PA 17601
Phone: (717) 874-5152
Web: familyownedmarkets.com
Dir.-Marketing: Kevin Hanus
Primary Supplier: MDI
Area Stores: 8
Area Vol.: $141.03 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
Area Stores: 255
Area Vol.: $3.29 billion

The Fresh Market
300 N. Greene St., Ste. 1100
Greensboro, NC 27401
Phone: (336) 272-1338
Web: thefreshmarket.com
Pres./CEO: Jason Potter
Primary Supplier: UNFI
Area Stores: 16
Area Vol.: $197.0 million

Geresbeck's Food Market
2109 Eastern Blvd.
Baltimore, MD 21220
Phone: (410) 686-3487
Web: geresbecks.com
Primary Supplier: C&S
Area Stores: 3
Area Vol.: $34.9 million

The Giant Company
Div. of Ahold Delhaize USA
P.O. Box 249
1149 Harrisburg Pike
Carlisle, PA 17013
Phone: (717) 249-4000
Web: giantfoodstores.com
Pres.: Nicholas Bertram
SVP-Customer Experience: Glennis Harris
CMO/SVP-Omnichannel Merch.: John Ruane
VP-Omnichannel Merch.-Center Store: Parag Shah

See **DIRECTORY** on page 68

TAKING STOCK

from page 6

Giant Food **–** Over the past five years, the perennial market leader has improved in many areas from store operations discipline to corporate culture enhancement. However, COVID took a bit of that mojo away as Giant (and other retailers) struggled with labor challenges and poorer than industry average in-stock conditions. Part of the latter problem (beyond industry-wide supply chain dysfunction) was parent firm Ahold Delhaize USA's (ADUSA) 2019 decision to control its own distribution, a complex process involving hundreds of moving parts. The transition from former supplier C&S as well as ADUSA's internal issues created worse than industry average service levels in its stores (which was also true at sister brands The Giant Company and Stop & Shop) and was the primary reasons Giant's sales were relatively flat this year. In my opinion, these are painful but temporary problems. Former president Gordon Reid (now president of Stop & Shop) and current head honcho Ira Kress have helped Giant reposition itself as a market leader that is no longer passive. From adding new stores to expanding its omnichannel presence, Giant is still firmly in control of its Baltimore-Washington leadership position.

Safeway **–** Unlike Giant, Safeway took advantage of much stronger in-stock conditions. While Giant (and ADUSA) will likely get its distribution act together over the next 18 months, Safeway is already there, having consolidated its distribution from Upper Marlboro, MD to Denver, PA in 2020. Having more product available created more sales and Safeway's comps over the past 12 months were very good. It also opened two new stores (both former Shoppers units) and remodeled several other supermarkets. It clearly needs to upgrade more stores and Albertsons Mid-Atlantic president Jim Perkins acknowledged those improvements are in the works. Safeway continues to be a solid "number two" in the B-W market – a traditional supermarket chain that's not flashy but utilizes its superior locations to its advantage.

Walmart **–** Once again, no new stores for the Behemoth. However, comp store sales were good despite slightly worse than industry average in-stock store conditions (you'd think that with that much supplier clout, Walmart would be able to keep their shelves better stocked). The continuing reason why no new stores opened over the 12 months is that the planet's largest retailer devoted the majority of its cap-ex into its digital and technology platforms. And part of its e-commerce initiative did include some physical improvements at store level such as additional curbside pickup sites and more micro-fulfillment areas inside the physical stores. There's no reason not to be believe that as inflation drives prices even higher that Walmart will become even stronger. Or to paraphrase CEO Doug McMillon: when price becomes even more a factor, we tend to fare better than the competition. Walmart is a tough enough competitor but think - if it could keep its stores cleaner and better stocked, and had a better trained labor force, how scary it could be especially in inflationary times.

Harris Teeter **–** Another solid, if not spectacular year for the upscale division of Kroger. Comp stores sales were good and in-stock conditions, by my evaluation, were at about the industry average (70-75 percent). A rare year when no new stores opened but there are four new units - in Washington, DC (Howard University); Alexandria, VA; Falls Church, VA; Kent Island, MD; and a replacement unit in Arlington, VA – set to be built. One important change did occur over the past year that's worth watching. HT president Rod Antolock retired after a 40-year career in the grocery biz and was replaced by industry veteran Tammy DeBoer, who cut her teeth at Food Lion. Clearly, Rod and Tammy have two different operating styles – it will be interesting to see her have an opportunity to lead a large retail organization.

Wegmans **–** A year ago, Wegmans was not fully able to take advantage of the sales boom that positively affected virtually all retailers in all trade channels. A large part of that reason was the Rochester, NY-based uber-retailer's decision to close most of its service and salad bars and reduce some of its fresh food offerings. Although they may be in slightly reimagined forms, most of those service areas have reopened and Wegmans, already the highest volume per-store supermarket in the B-W market, produced strong comp store sales over the past year. The expansion pipeline has also reopened with a new store

TAKING STOCK continues on page 38

The Giant Company recently announced that **Jennifer Heinzen Krueger** has been named VP-team experience effective May 30. She replaces Matt Lutcavage who is pursuing a new opportunity outside of the company.

In her new position, Krueger will lead the human resources team, focusing on fostering a culture of care and innovation and delivering an enhanced experience for more than 35,000 team members. Her areas of responsibility will include people strategy, talent management, organizational development, diversity and inclusion, communications, corporate social responsibility, change management, training and development, and total rewards. Krueger will report directly to Nicholas Bertram, president.

Krueger began her grocery career as a customer operations manager with The Giant Company in 1998. Over the past 23 years, she has held a variety of positions in increasing responsibility across the Giant and Ahold Delhaize organizations focused on team member development and training. Most recently, Krueger served as chief learning officer and VP-learning and development at Ahold Delhaize.

Jennifer Heinzen Krueger

Brian Benes

Kyla Caponigro

"Jen is an industry expert in learning and organizational development and is a role model for curiosity and continuous learning," said Bertram. "I'm thrilled to welcome her back to The Giant Company and to my leadership team and look forward to her contributions as we continue our strategic growth."

Krueger has a Ph.D. in workforce development and education from Penn State University and an MBA in business management from Monmouth University. She serves as the programming officer for NextUp's (formerly the Network of Executive Women) Pennsylvania chapter.

Added Bertram, "Matt played a significant role in building our purpose-led company and in bringing our team promises to life. He will be missed by many, and we wish him well as he begins his new adventure."

Advantage Group International recently announced the appointment of **Brian Benes** as director of client services, USA. He joins the global organization headquartered in Canada to provide organizational, sales and client service leadership in the USA marketplace.

Benes brings more than 15 years of retail and consumer packaged goods (CPG) experience to his new position, including his most recent position as insights manager at C.A. Fortune in Chicago. In that role, he managed insights, created compelling sales stories and worked closely with over 30 client brands to achieve their objectives. Brian has also held client and account roles at

See **PEOPLE** on page 103

Canada Dry

Canada Dry Potomac:
3600 Pennsy Drive, Landover, MD 20785 • 301-773-5500
5330 Port Royal Road, Springfield, VA 22151 • 703-321-6100
6719 Dover Road, Glen Burnie, MD, 21061 • 410-760-7770
3100 Hopkins Road, Richmond, VA 23224 • 804-231-7777

Canada Dry Norfolk:
1400 Air Rail Ave, Virginia Beach, VA 23455 • 757-464-1771

Canada Dry Delaware Valley:
8275 Route 130, Pennsauken, NJ • 800-533-1911

Washington Supermarket Leaders

- Giant Still King Of $13.3B Market
- Albertsons Posts Solid Comps
- Int'l. Markets Adds 5 New Stores
- Amazon Fresh Makes Local Debut
- New Units Help Aldi Grow Share

Rank	Company	2022 Stores	2022 Sales (in millions)	% of 2022 Market	2021 Stores	2021 Sales (in millions)	% of 2021 Market
1	Giant Food	114	$4,075.81	30.55%	113	$4,143.33	31.99%
2	Albertsons (Balducci's/Safeway)	87	$2,186.11	16.39%	86	$2,048.93	15.82%
3	International Markets	106	$1,644.90	12.33%	101	$1,517.80	11.72%
4	Harris Teeter	43	$1,449.30	10.86%	43	$1,427.60	11.02%
5	Wegmans	12	$1,159.10	8.69%	12	$1,134.90	8.76%
6	Whole Foods (Amazon Fresh)	26	$991.30	7.43%	22	$902.60	6.97%
7	Trader Joe's	19	$529.50	3.97%	18	$489.60	3.78%
8	Aldi	52	$449.90	3.37%	48	$412.60	3.19%
9	Food Lion	32	$430.90	3.23%	32	$424.30	3.28%
10	Weis Markets	24	$359.17	2.69%	24	$353.13	2.73%
		515	**$13,275.99**	**99.52%**	**499**	**$12,854.79**	**99.27%**

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

Total supermarket sales for the area are $13.34 billion Source: *Food World*, June 2022

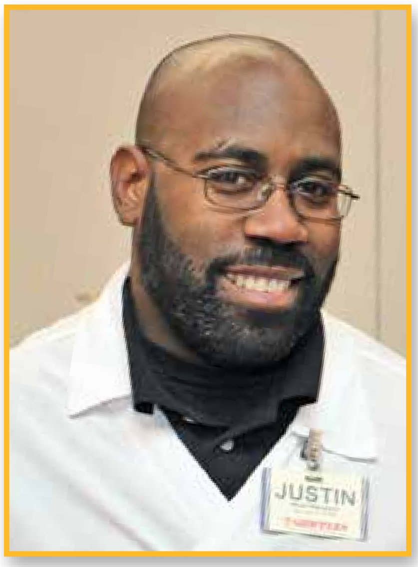
Washington Market Leaders

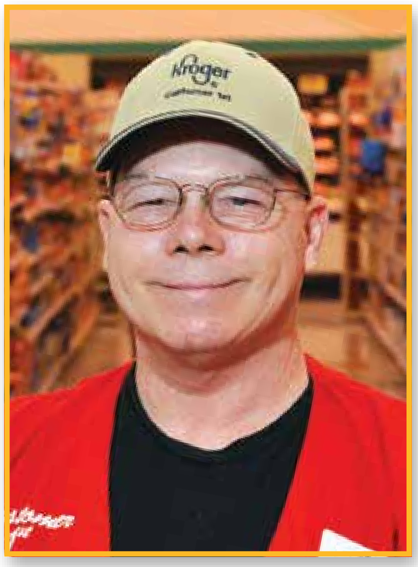
- Alt. Channels Share At 32%
- Giant Reigns Over All Comers
- Drug Chains Close Stores
- Target, Walmart Control 10.2%
- Strong Comps Boost Costco

Rank	Company	2022 Stores	2022 Sales (in millions)	% of 2022 Market	2021 Stores	2021 Sales (in millions)	% of 2021 Market
1	Giant Food	114	$4,075.81	17.86%	113	$4,143.33	18.81%
2	Albertsons (Balducci's/Safeway)	87	$2,186.11	9.58%	86	$2,048.93	9.30%
3	International Markets	106	$1,644.90	7.21%	101	$1,517.80	6.89%
4	CVS	257	$1,555.70	6.82%	259	$1,514.60	6.88%
5	Harris Teeter	43	$1,449.30	6.35%	43	$1,427.60	6.48%
6	Walmart	40	$1,311.10	5.75%	40	$1,232.40	5.59%
7	Costco	17	$1,217.00	5.33%	17	$1,116.20	5.07%
8	Wegmans	12	$1,159.10	5.08%	12	$1,134.90	5.15%
9	Target (Super Target)	49	$1,015.90	4.45%	49	$918.90	4.17%
10	Whole Foods (Amazon Fresh)	26	$991.30	4.34%	22	$902.60	4.10%
11	7-Eleven	496	$964.60	4.23%	499	$946.00	4.29%
12	Walgreens	96	$572.30	2.51%	98	$551.00	2.50%
13	Trader Joe's	19	$529.50	2.32%	18	$489.60	2.22%
14	Aldi	52	$449.90	1.97%	48	$412.60	1.87%
15	Food Lion	32	$430.90	1.89%	32	$424.30	1.93%
16	Weis Markets	24	$359.17	1.57%	24	$353.13	1.60%
17	Shoppers	12	$351.50	1.54%	13	$383.00	1.74%
18	BJ's Wholesale Club	9	$345.10	1.51%	9	$339.40	1.54%
19	Wawa	44	$314.00	1.38%	41	$291.26	1.32%
20	Lidl	27	$238.80	1.05%	21	$185.40	0.84%
		1,562	**$21,161.99**	**92.74%**	**1,545**	**$20,332.95**	**92.30%**

This chart lists top 20 retailers in the Washington market which sell groceries, HBC, drugs, GM, tobacco products. Volumes listed include 100% of store sales for supermarkets, c-stores and drug chains. Sales for club stores, Target and Walmart are extrapolated to include comparable categories, as explained in the formula on page 85. Petroleum sales are not included. Counties/cities included are: Washington, DC; Calvert, Charles, Frederick, Montgomery and Prince George's in MD; Arlington, Clarke, Culpeper, Fairfax, Fauquier, King George, Loudoun, Prince William, Spotsylvania, Stafford and Warren and the independent cities of Alexandria, Fairfax, Falls Church and Fredericksburg in VA. ( ) Indicates another banner used by the company. **Total food sales for the area are: $22.82 billion** Source: *Food World,* June 2022

STILL AMERICA'S FRONT-LINE HEROES





The proud members of UFCW Local 400 working at Giant, Kroger, Safeway, Shoppers and other grocery chains have always been heroes. Long before the COVID pandemic upended our nation, our members showed up every day as front-line first responders. They worked hard, served their customers faithfully, and made our employers profitable.

Today, our members still face undue risk every time they come to work. With the continual emergence of new variants, the threat of COVID persists even as mask-wearing vanishes. And that's not all. The horrific May 14th mass shooting at Tops Friendly Market in Buffalo, NY, coming on the heels of last year's mass shootings at King Soopers in Boulder, CO and at Kroger in Collierville, TN, make clear that every grocery store worker is a potential target who needs better protection.

Our employers need to recognize our members' heroism in deeds as well as words, with pay and benefits that reflect their continued status as front-line first responders, and that keep up with inflation no matter how high it goes and how long it persists. Our members make our employers profitable and they must share in the prosperity their hard work generates.

Mark P. Federici
President

UFCW Local 400
a VOICE for working America

Christopher Hoffmann
Secretary-Treasurer

8400 CORPORATE DRIVE, SUITE 200 ▪ LANDOVER, MD 20785 ▪ 1-800-638-0800 ▪ 301-459-3400
WWW.UFCW400.ORG ▪ WWW.FACEBOOK.COM/UFCW400 ▪ WWW.TWITTER.COM/UFCW400

Baltimore Supermarket Leaders

- Giant Controls 33% Of Sales
- Safeway Aided By In-Stocks
- Wegmans Is Per-Store Avg. Leader
- Weis Enjoys Strong Comp Sales
- Shoppers Continues Closures

Rank	Company	2022 Stores	2022 Sales (in millions)	% of 2022 Market	2021 Stores	2021 Sales (in millions)	% of 2021 Market
1	Giant Food	40	$1,682.95	32.65%	40	$1,671.66	32.63%
2	Albertsons (Acme Safeway)	27	$756.60	14.68%	26	$701.60	14.08%
3	Weis Markets	25	$528.67	10.25%	25	$503.25	9.90%
4	Wegmans	5	$447.10	8.67%	5	$442.10	8.70%
5	ShopRite (Klein's/Village/PR)	12	$385.50	7.48%	12	$383.00	7.54%
6	International Markets	20	$274.90	5.33%	19	$258.90	5.09%
7	Harris Teeter	6	$231.30	4.49%	6	$226.90	4.48%
8	Food Lion	20	$231.00	4.48%	20	$229.10	4.51%
9	Shoppers	8	$215.00	4.17%	10	$270.40	5.32%
10	Aldi	27	$204.40	3.96%	26	$193.00	3.80%
		190	**$4,957.42**	**96.16%**	**189**	**$4,879.91**	**96.02%**

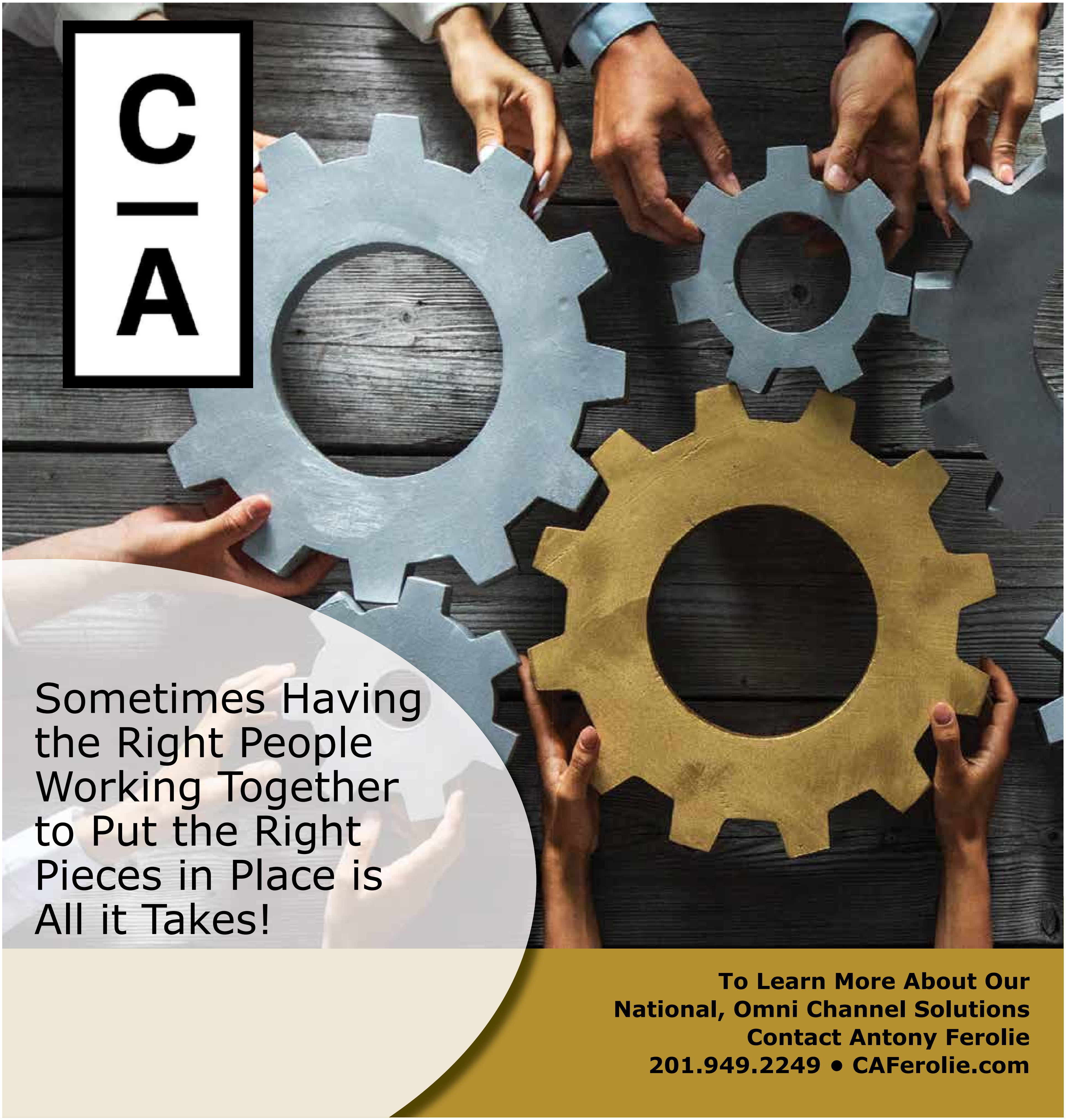
The chart above lists the top 10 supermarket retailers in the Baltimore market. Counties/cities included are: Anne Arundel, Baltimore City, Baltimore, Carroll, Harford, Howard and Queen Anne's. Petroleum sales are not included. ( ) Indicates another banner used by the company.
Total supermarket sales for the area are $5.16 billion. Source: *Food World*, June 2022

Baltimore Market Leaders

- Alts. Share Grows To 34.9%
- Giant Doubles WM Share
- Walgreens, CVS Neck & Neck
- Convenience Store Share Is 6.2%
- Target Posts Excellent Comps

Rank	Company	2022 Stores	2022 Sales (in millions)	% of 2022 Market	2021 Stores	2021 Sales (in millions)	% of 2021 Market
1	Giant Food	40	$1,682.95	16.19%	40	$1,671.66	16.18%
2	Walmart (SuperCenter)	22	$782.30	7.53%	23	$753.30	7.48%
3	Albertsons (Acme/Safeway)	27	$756.60	7.28%	26	$701.60	6.97%
4	Weis Markets	25	$528.67	5.09%	25	$503.25	5.00%
5	Walgreens	84	$480.20	4.62%	83	$449.20	4.46%
6	CVS	88	$478.50	4.60%	89	$469.30	4.66%
7	Wegmans	5	$447.10	4.30%	5	$442.10	4.39%
8	ShopRite (Klein's/Village/PR)	12	$385.50	3.71%	12	$383.00	3.81%
9	Target	19	$367.10	3.53%	18	$316.00	3.14%
10	7-Eleven	163	$325.30	3.13%	165	$323.10	3.21%
11	Royal Farm Stores	124	$316.70	3.05%	116	$271.30	2.70%
12	Costco	5	$304.10	2.93%	5	$275.70	2.74%
13	Sam's Club	6	$303.60	2.92%	6	$289.30	2.87%
14	International Markets	20	$274.90	2.64%	19	$258.90	2.57%
15	BJ's Wholesale Club	7	$270.10	2.60%	7	$266.20	2.64%
16	Harris Teeter	6	$231.30	2.22%	6	$226.90	2.25%
17	Food Lion	20	$231.00	2.22%	20	$229.10	2.28%
18	Shoppers	8	$215.00	2.07%	10	$270.40	2.69%
19	Aldi	27	$204.40	1.97%	26	$193.00	1.92%
20	B. Green (Food Depot/Green Valley)	8	$195.40	1.88%	8	$198.70	1.97%
		716	**$8,780.72**	**84.47%**	**709**	**$8,492.01**	**84.37%**

This chart lists the top 20 retailers in the Baltimore market which sell groceries, HBC, drugs, general merchandise and tobacco products. Volumes listed include 100% of store sales for supermarkets, c-stores and drug chains. Sales for club stores, Target and Walmart are extrapolated to include comparable categories, as explained in the formula on page 85. 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: $10.4 billion.** Source: *Food World,* June 2022


Sometimes Having the Right People Working Together to Put the Right Pieces in Place is All it Takes!
To Learn More About Our
National, Omni Channel Solutions
Contact Antony Ferolie
201.949.2249 • CAFerolie.com

FOOD WORLD'S LEADING INDEPENDENTS: 2022

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

Rank	Company	2022 Supermarkets	20212 (in millions)	2021 Supermarkets	2021 (in millions)	Headquarters	Primary Supplier
1	B. Green (Green Valley/Food Depot/Shoppers Value)	11	$213.85	11	$217.70	Baltimore, MD	UNFI
2	Karns Price & Fancy Foods	10	$184.00	9	$11.00	Mechanicsburg, PA	UNFI
3	Family Owned Markets	8	$141.03	8	$153.58	Millersville, PA	MDI
4	Streets Markets (Snider's)	12	$100.10	11	$90.00	Washington, DC	UNFI
5	Graul's	6	$64.90	6	$62.00	Baltimore, MD	UNFI
6	McKay's Food & Drug	4	$60.30	5	$64.60	Hollywood, MD	UNFI
7	Sharp Shopper	4	$51.20	4	$50.50	Ephrata, PA	Direct
8	Eddie's of Roland Park	2	$40.00	2	$39.30	Baltimore, MD	Bozzuto's
9	Geresbeck's Food Market	3	$34.90	3	$34.40	Baltimore, MD	C&S
10	Roots Markets	2	$22.60	2	$22.30	Clarksville, MD	UNFI
11	Boyer's Markets	1	$11.18	1	$10.66	Orwigsburg, PA	UNFI
	GRAND TOTAL	**63**	**$924.06**	**62**	**$916.04**		

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

Source: *Food World,* June 2022


C&S
Wholesale
Grocers
For over 100 years, C&S Wholesale Grocers has been providing the products, value, knowledge and services to help independent, family-owned businesses grow. Call us today to learn how we can help.
Our family business is helping your family business succeed!
1-800-628-1173 or visit www.cswg.com

State	County	2022 Stores	2022 Sales (in millions)	2022 County Food Sales	% of 2022 County Market	2021 Stores	2021 Sales (in millions)	% of 2021 County Market
DC	Washington (SuperCenter)	3	$105.80	$2,478.30	4.27%	3	$99.70	4.13%
DC Recap: 3 stores with sales of $105.8 million. Total retail food sales for DC in the study: $2.48 billion. Walmart share of DC is 4.27%.								
DE	Kent (SuperCenter)	2	$63.50	$525.60	12.08%	2	$59.20	11.48%
DE	Sussex (SuperCenter)	4	$135.90	$1,002.10	13.56%	4	$128.40	13.29%
DE Recap: 6 stores with sales of $199.4 million. Total retail food sales for DE in the study: $1.53 billion. Walmart share of DE is 13.05%.								
MD	Anne Arundel (SuperCenter)	4	$153.20	$2,327.80	6.58%	4	$144.50	6.35%
MD	Baltimore County (SuperCenter)	9	$346.90	$3,450.20	10.05%	10	$341.60	10.43%
MD	Calvert (SuperCenter)	2	$60.60	$398.40	15.21%	2	$57.50	14.85%
MD	Caroline (SuperCenter)	1	$40.70	$85.80	47.44%	1	$38.10	46.35%
MD	Carroll (SuperCenter)	4	$113.40	$689.10	16.46%	4	$107.20	16.17%
MD	Cecil (SuperCenter)	2	$59.60	$289.50	20.59%	2	$56.80	20.34%
MD	Charles	2	$42.80	$525.20	8.15%	2	$40.30	7.81%
MD	Dorchester (SuperCenter)	1	$26.90	$59.50	45.21%	1	$25.20	44.44%
MD	Frederick (SuperCenter)	2	$111.40	$967.00	11.52%	2	$103.70	11.43%
MD	Harford (SuperCenter)	3	$94.60	$1,036.90	9.12%	3	$89.10	8.73%
MD	Howard (SuperCenter)	2	$74.20	$1,203.10	6.17%	2	$70.90	6.03%
MD	Montgomery	1	$37.90	$3,765.80	1.01%	1	$35.30	0.97%
MD	Prince George's	4	$83.10	$3,223.10	2.58%	4	$78.40	2.54%
MD	St. Mary's (SuperCenter)	1	$56.00	$391.30	14.31%	1	$53.90	13.59%
MD	Talbot	1	$22.20	$227.80	9.75%	1	$20.90	9.63%
MD	Washington (SuperCenter)	2	$111.80	$555.10	20.14%	2	$104.30	20.03%
MD	Wicomico (SuperCenter)	2	$74.50	$299.70	24.86%	2	$70.80	25.34%
MD	Worcester (SuperCenter)	2	$76.70	$248.70	30.84%	2	$72.80	31.56%
MD Recap: 45 stores with sales of $1.59 billion. Total retail food sales for MD in the study: $21.57 billion. Walmart share of MD is 7.35%.								
PA	Adams (SuperCenter)	1	$21.80	$215.10	10.13%	1	$20.40	10.18%
PA	Cumberland (SuperCenter)	4	$119.60	$1,206.50	9.91%	4	$113.70	9.99%
PA	Dauphin (SuperCenter)	2	$80.60	$1,067.10	7.55%	2	$77.40	7.57%
PA	Franklin (SuperCenter)	2	$82.80	$455.60	18.17%	2	$79.20	17.22%
PA	Lancaster (SuperCenter)	3	$136.50	$1,852.90	7.37%	3	$128.80	7.40%
PA	Lebanon (SuperCenter)	2	$86.90	$438.80	19.80%	2	$82.10	20.04%
PA	York (SuperCenter)	6	$217.30	$1,642.70	13.23%	6	$205.50	13.10%
PA Recap: 20 stores with sales of $745.5 million. Total retail food sales for PA in the study: $6.99 billion. Walmart share of PA is 10.7%.								
VA	Accomack (SuperCenter)	1	$33.00	$100.80	32.74%	1	$31.30	32.30%
VA	Albemarle (SuperCenter)	1	$38.90	$677.40	5.74%	1	$36.80	5.73%
VA	Chesapeake City (SuperCenter)	6	$165.10	$886.30	18.63%	6	$158.70	17.97%
VA	Chesterfield (SuperCenter)	6	$233.60	$1,500.20	15.57%	6	$230.70	15.98%
VA	Culpeper (SuperCenter)	1	$32.10	$173.40	18.51%	1	$30.40	18.45%
VA	Dinwiddie (SuperCenter)	1	$43.10	$134.90	31.95%	1	$40.40	30.82%
VA	Essex (SuperCenter)	1	$42.50	$66.70	63.72%	1	$39.00	63.11%
VA	Fairfax (SuperCenter)	8	$243.10	$5,478.40	4.44%	8	$230.60	4.33%
VA	Fauquier (SuperCenter)	1	$37.80	$188.40	20.06%	1	$36.10	20.41%
VA	Frederick (SuperCenter)	3	$150.10	$522.40	28.73%	3	$141.80	28.57%
VA	Gloucester (SuperCenter)	1	$37.10	$128.90	28.78%	1	$33.90	27.70%
VA	Hampton/Newport News (SC/Neighborhood Mkt)	5	$158.40	$1,333.70	11.88%	5	$149.60	13.34%
VA	Hanover (SC/Neighborhood Mkt)	3	$107.80	$484.10	22.27%	3	$102.10	22.15%
VA	Henrico (SC/Neighborhood Mkt)	7	$283.10	$1,970.40	14.37%	7	$268.50	14.09%
VA	James City (SC/Neighborhood Mkt)	2	$74.30	$426.30	17.43%	2	$70.80	17.29%
VA	King George (SuperCenter)	1	$37.20	$96.60	38.51%	1	$33.90	37.33%
VA	Lancaster (SuperCenter)	1	$38.10	$84.30	45.20%	1	$34.20	43.02%

IN REVIEW: WALMART

State	County	2022 Stores	2022 Sales (in millions)	2022 County Food Sales	% of 2022 County Market	2021 Stores	2021 Sales (in millions)	% of 2021 County Market
VA	Loudoun (SuperCenter)	3	$122.90	$1,536.10	8.00%	3	$115.40	7.84%
VA	Norfolk City (SC/Neighborhood Mkt)	4	$160.70	$790.50	20.33%	4	$152.30	20.18%
VA	Nottoway (SuperCenter)	1	$35.20	$39.50	89.11%	1	$33.60	90.08%
VA	Orange (SuperCenter)	2	$66.30	$126.60	52.37%	2	$62.80	52.07%
VA	Page (SuperCenter)	1	$40.20	$73.40	54.77%	1	$37.20	53.68%
VA	Portsmouth City (SuperCenter)	1	$31.60	$276.70	11.42%	1	$30.40	11.12%
VA	Powhatan (SuperCenter)	1	$39.10	$76.90	50.85%	1	$37.00	50.20%
VA	Prince William (SuperCenter)	5	$125.20	$1,937.20	6.46%	5	$113.60	6.12%
VA	Shenandoah (SuperCenter)	1	$37.40	$122.40	30.56%	1	$35.70	29.97%
VA	Southampton (SuperCenter)	1	$43.60	$93.20	46.78%	1	$41.20	45.78%
VA	Spotsylvania (SuperCenter)	4	$162.10	$822.80	19.70%	4	$154.30	20.10%
VA	Stafford (SuperCenter)	2	$67.20	$437.90	15.35%	2	$63.90	14.92%
VA	Suffolk City (SuperCenter)	2	$74.00	$308.90	23.96%	2	$70.60	23.24%
VA	Virginia Beach (SC/Neighborhood Mkt)	7	$242.50	$1,695.20	14.31%	7	$229.50	13.87%
VA	Warren (SuperCenter)	1	$41.90	$161.40	25.96%	1	$39.30	26.77%
VA	York (SuperCenter)	1	$41.10	$182.80	22.48%	1	$38.70	21.52%

VA Recap: 86 stores with sales of $3.09 billion. Total retail food sales for VA in the study: $25.55 billion. Walmart share of VA is 10.02%.

Mid-Atlantic Recap: 160 stores with sales of $5.72 billion annually. Mid-Atlantic retail food sales total: $57.1 billion.

Walmart Per Store Average: $35.77 million ( ) Name in parentheses indicates another banner used by the company. Source: *Food World,* June 2022

Baltimore-Washington Supermarket Leaders

- Giant Retains B-W Dominance
- Safeway Helped By Remodels
- Fast-Growing Intl. Mkts. Up Share
- WFM, AF Add Stores
- Shoppers Continues Decline

Rank	Company	2022 Stores	2022 Sales (in millions)	% of 2022 Market	2021 Stores	2021 Sales (in millions)	% of 2021 Market
1	Giant Food	154	$5,758.76	31.14%	153	$5,814.99	32.48%
2	Albertsons (Acme/Balducci/S'way)	114	$2,942.71	15.91%	112	$2,750.53	15.25%
3	International Markets	126	$1,919.80	10.38%	120	$1,776.70	9.05%
4	Harris Teeter	49	$1,680.60	9.09%	49	$1,654.50	9.14%
5	Wegmans	17	$1,606.20	8.68%	17	$1,577.00	8.71%
6	Whole Foods (Amazon Fresh)	31	$1,180.40	6.38%	26	$1,059.20	5.87%
7	Weis Markets	49	$887.84	4.80%	49	$856.38	4.75%
8	Food Lion	52	$661.90	3.58%	52	$653.40	3.62%
9	Aldi	79	$654.30	3.54%	74	$605.60	3.36%
10	Trader Joe's	23	$615.10	3.33%	22	$574.10	3.18%
		694	**$17,907.61**	**96.82%**	**674**	**$17,322.40**	**96.06%**

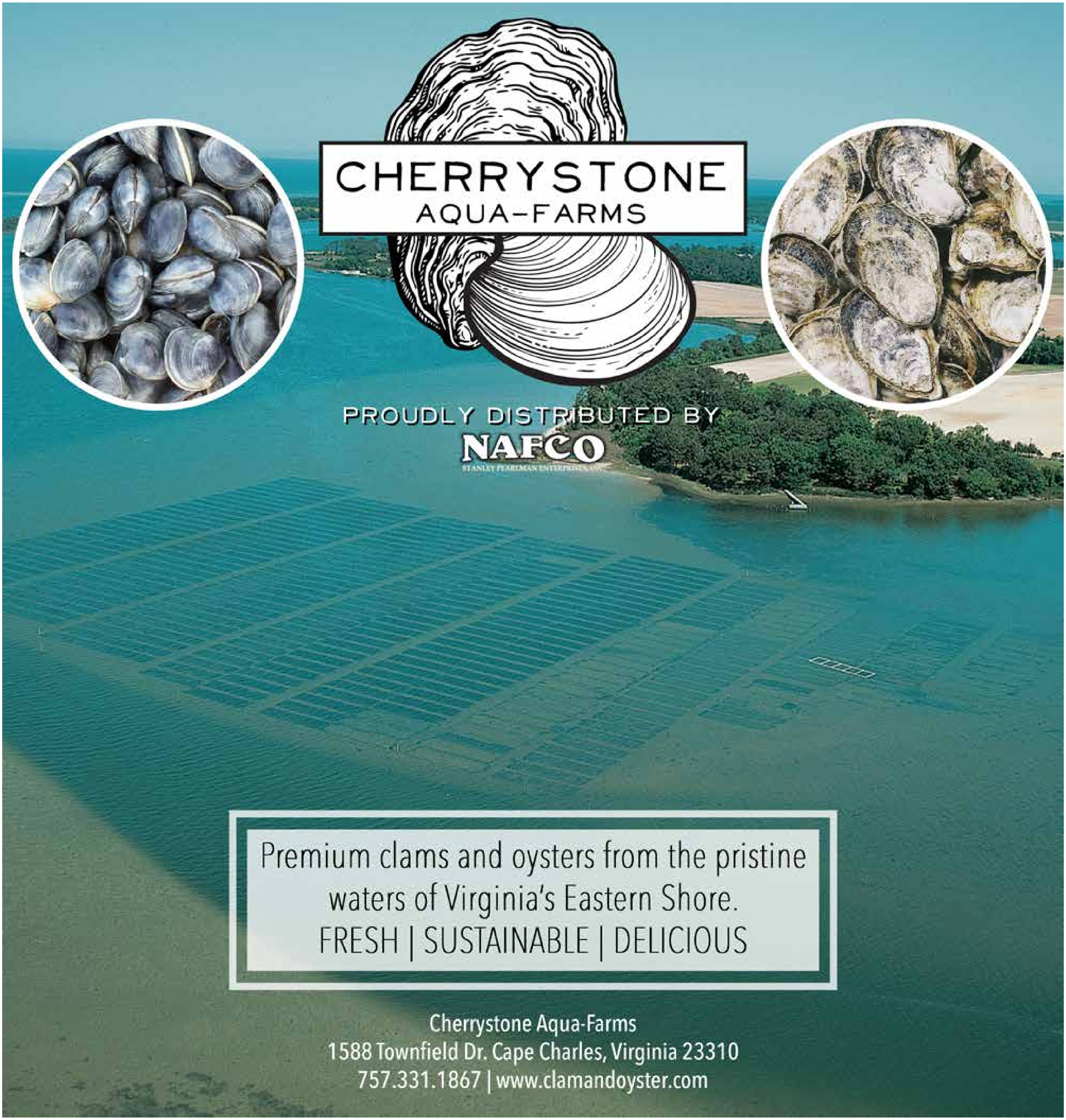
This chart lists the top 10 supermarket retailers in the B-W market. Counties/cities included are: Washington, DC; Anne Arundel, Balt City, Baltimore, Calvert, Carroll, Charles, Frederick, Harford, Howard, Montgomery, Prince George's, Queen Anne's in MD; Arlington, Clarke, Culpeper, Fairfax, Fauquier, King George, Loudoun, Pr. William, Spotsylvania, Stafford and Warren and the independent cities of Alexandria, Fairfax, Falls Church and Fredericksburg in VA. Petroleum sales are not included. ( ) Indicates another banner used by the company. **Total supermarket sales for the area are $18.5 billion.** Source: *Food World,* June 2022

Baltimore-Washington Market Leaders

- Alts. Share Grows To 32.9%
- Giant Tops All, Share At 17.3%
- WM: No New Units, Strong Comps
- Mass Merchants Share At 10.5%
- Costco, BJ's, Sam's Grab 6.3%

Rank	Company	2022 Stores	2022 Sales (in millions)	% of 2022 Market	2021 Stores	2021 Sales (in millions)	% of 2021 Market
1	Giant Food	154	$5,758.76	17.34%	153	$5,814.99	18.77%
2	Albertsons (Acme/Balducci's/S'way)	114	$2,942.71	8.86%	112	$2,750.53	8.57%
3	Walmart (SuperCenter)	62	$2,093.40	6.30%	63	$1,985.70	6.19%
4	CVS	345	$2,034.20	6.12%	348	$1,983.90	6.18%
5	International Markets	126	$1,919.80	5.78%	120	$1,776.70	5.54%
6	Harris Teeter	49	$1,680.60	5.06%	49	$1,654.50	5.16%
7	Wegmans	17	$1,606.20	4.84%	17	$1,577.00	4.91%
8	Costco	22	$1,521.10	4.58%	22	$1,391.90	4.34%
9	Target (Super Target)	68	$1,383.00	4.16%	67	$1,234.90	3.85%
10	7-Eleven	659	$1,289.90	3.88%	664	$1,269.10	3.95%
11	Whole Foods (Amazon Fresh)	31	$1,180.40	3.55%	26	$1,059.20	3.30%
12	Walgreens	180	$1,052.50	3.17%	181	$1,000.20	3.12%
13	Weis Markets	49	$887.84	2.67%	49	$856.38	2.67%
14	Food Lion	52	$661.90	1.99%	52	$653.40	2.04%
15	Aldi	79	$654.30	1.97%	74	$605.60	1.89%
16	BJ's Wholesale Club	16	$615.20	1.85%	16	$605.60	1.89%
17	Trader Joe's	23	$615.10	1.85%	22	$574.10	1.79%
18	Shoppers	20	$566.50	1.71%	23	$653.40	2.04%
19	Sam's Club	11	$483.50	1.46%	11	$463.60	1.44%
20	Wawa	74	$483.20	1.45%	70	$450.49	1.40%
		2,151	**$29,430.11**	**88.60%**	**2,139**	**$28,361.19**	**88.37%**

Chart lists the top 20 retailers in the Balt-Wash market which sell groceries, HBC, drugs, GM and tobacco products. Volumes listed include 100% of store sales for supermarkets, c-stores and drug chains. Sales for club stores, Target and Walmart are extrapolated to include comparable categories,as explained in the formula on page 85. Petroleum sales are not included. Counties/cities included are: Washingon, DC; Anne Arundel, Balt. City, Baltimore, Calvert, Carroll, Charles, Frederick, Harford, Howard, Montgomery, Prince George's and Queen Anne's in MD; Arlington, Clarke, Culpeper, Fairfax, Fauquier, King George, Loudoun, Pr. William, Spotsylvania, Stafford and Warren and independent cities of Alexandria, Fairfax, Falls Church and Fredericksburg in VA. ( ) Alternate banner. **Total food sales for the area are: $33.22 billion.** Source: Food World, June 2022


CHERRYSTONE
AQUA-FARMS
PROUDLY DISTRIBUTED BY
NAFCO
Premium clams and oysters from the pristine waters of Virginia's Eastern Shore.
FRESH | SUSTAINABLE | DELICIOUS
Cherrystone Aqua-Farms
1588 Townfield Dr. Cape Charles, Virginia 23310
757.331.1867 | www.clamandoyster.com

TAKING STOCK

from page 18

in Alexandria opening last month, its first DC store debuting on July 13 and future stores slated for Rockville, MD and Reston, VA in the next few years.

And now for something a bit different – a view of a potentially emerging retailer and one whose days are likely numbered.

Amazon Fresh – At this point, emerging might be too strong a word, but the newest retail food division of Amazon has opened six stores (three after our market study measuring period ended) and has at least nine other stores slated to open in the B-W market. Early impressions are not good, unless you buy into the theory that the stores will primarily serve as retail hubs to supplement the parent company's e-commerce business. Or that its "Just Walk Out" technology is a game changer. From a blocking and tackling perspective at store level, execution has been subpar. Amazon Fresh's merchandising approach is quirky at best; store ops are not crisp, and for a company the size of Amazon you'd think in-store service levels would be better. It's still early in the game and Amazon has deeper pockets than almost everyone else, so there's still time to improve, but what's clear thus far is that the company has a long way to go to become a top-flight merchant.

Shoppers – Last year, we gave the retail unit of UNFI "almost RIP" status. Twelve months later, the situation is slightly worse. Three more stores have been closed or been sold, leaving Shoppers with 20 supermarkets remaining in the B-W market. In the past year, UNFI CEO Steve "Senor Spinmeister" retired, creating an opportunity for former Coca-Cola executive Sandy Douglas to take the helm. While UNFI will now likely keep its bigger and more profitable Cub division in the Midwest, it's time for Douglas to sell or close the remaining Shoppers units. The stores now resemble nearly empty barns. Stores that once did $800,000-$1 million per week are now performing at one-third those levels. And the perception, despite the efforts of what remains of a very proud and loyal work force, is that the company has already given up. Why continue the ineptness any longer?

Sheridan's Upcoming Retirement, Lane's Sudden Resignation Portends Big Changes At Wakefern

Over the next 16 months, Wakefern Food Corp., the largest grocery wholesaler in the Mid-Atlantic and Northeast, will be searching for a new president/COO and a new executive vice president.

That's because Joe Sheridan, the veteran executive of the Keasbey, NJ-based co-op, has announced his retirement from Wakefern, which includes such powerful retail banners as ShopRite, Price Rite and Fresh Grocer. Sheridan recently finalized his retirement plan, about which he had previously notified Wakefern's board of directors. Sheridan will be stepping down in October 2023. At that point, the popular executive will have served the grocery co-op for nearly 48 years, the last 12 as the de facto day-to-day leader of the company.

In an unrelated announcement, Chris Lane, who many trade observers believed would become Sheridan's successor, surprisingly resigned from Wakefern on June 6.

Lane joined Wakefern from Duane Reade in 2003 as VP-pharmacy and added HBC to his responsibilities in 2005. In 2008, he was promoted to VP-grocery, DSD and commercial bakery. Lane then served as senior VP-product divisions and e-commerce and in 2016, he was named executive VP.

"Chris's departure is a tremendous loss to Wakefern," noted Joe Colalillo, chairman and CEO of Wakefern. "Chris has been a trusted advisor and provided the strong, ethical leadership that our cooperative of family-owned businesses depends on. I respect Chris's decision and wish him success in the future."

Sheridan added: "After 19 years at Wakefern, with the last six years in the role of EVP, Chris has decided to leave Wakefern to pursue other opportunities. Chris has been the bold leader we've needed at Wakefern. He initiated and led us through a strategic plan that focused on today's most pressing retail challenges, helped our cooperative succeed in a highly competitive market and allowed us to thrive during the pandemic. Many of the advances we have

TAKING STOCK continues on page 45

Catelli Bros™
Family of Foods

COOK UP SOME LOVE

WE'RE NOT JUST VEAL & LAMB ANYMORE

NOW WE'RE CATELLI BROTHERS FAMILY OF FOODS

Our generations of experience in case ready veal and lamb products—and superior customer service—enable us to deliver customized products and packaging options to meet your needs and improve your bottom line.

Now we have added a second U.S. production facility and broadened our family of value-added products to include **beef, chicken, pork and turkey**—with expanded grinding capabilities, custom processing and private label options.

As the retailer's best source for top quality meat products, we continue to provide you and your customers with safe, traceable, nutritious and delicious veal and lamb. **And now, more!**

Call Lou Licht, Executive Vice President, Sales & Marketing at 856-869-9293, Ext. 229.

from family to table for over 75 years

CatelliBrothers.com

Préval AG

VEAL | AMERICAN LAMB | IMPORTED LAMB | BEEF | CHICKEN | PORK | TURKEY

Collingswood, NJ | Sutton, MA

IN REVIEW: HARRIS TEETER

State	County	2022 Stores	2022 Sales (in millions)	2022 County Food Sales	% of 2022 County Market	2021 Stores	2021 Sales (in millions)	% of 2021 County Market
DC	Washington	3	$160.80	$2,478.30	6.49%	4	$191.60	7.94%
DC Recap: 3 stores with sales of $160.8 million. Total retail food sales for DC in the study: $2.48 billion. Harris Teeter share of DC is 6.49%.								
DE	Sussex	2	$40.20	$1,002.10	4.01%	2	$39.70	4.11%
DE Recap: 2 stores with sales of $40.2 million. Total retail food sales for DE in the study: $1.53 billion. Harris Teeter share of DE is 2.63%.								
MD	Anne Arundel	1	$36.10	$2,327.80	1.55%	1	$35.30	1.55%
MD	Baltimore City	2	$82.00	$1,529.60	5.36%	2	$80.20	5.28%
MD	Calvert	1	$21.40	$398.40	5.37%	1	$21.00	5.42%
MD	Howard	3	$113.20	$1,203.10	9.41%	3	$111.40	9.48%
MD	Montgomery	7	$185.10	$3,765.80	4.92%	7	$182.70	5.02%
MD	Prince George's	2	$40.40	$3,223.10	1.25%	2	$39.80	1.29%
MD	St. Mary's	1	$27.40	$391.30	7.00%	1	$25.80	6.50%
MD	Talbot	1	$26.40	$227.80	11.59%	1	$26.10	12.02%
MD Recap: 18 stores with sales of $532.0 million. Total retail food sales for MD in the study: $21.57 billion. Harris Teeter share of MD is 2.47%.								
VA	Albemarle	3	$74.60	$677.40	11.01%	3	$73.70	11.49%
VA	Arlington	6	$265.70	$963.20	27.59%	6	$260.60	27.44%
VA	Chesapeake City	3	$77.90	$886.30	8.79%	3	$77.30	8.75%
VA	Fairfax	10	$382.50	$5,478.40	6.98%	9	$346.50	6.50%
VA	Fauquier	1	$19.20	$188.40	10.19%	1	$18.90	10.68%
VA	Hampton/Newport News	2	$40.90	$1,333.70	3.07%	2	$40.60	3.62%
VA	James City	3	$104.60	$426.30	24.54%	3	$102.70	25.07%
VA	Loudoun	9	$240.50	$1,536.10	15.66%	9	$235.30	15.98%
VA	Norfolk City	3	$69.90	$790.50	8.84%	3	$68.70	9.10%
VA	Portsmouth City	1	$24.30	$276.70	8.78%	1	$23.80	8.70%
VA	Prince William	4	$133.70	$1,937.20	6.90%	4	$131.20	7.07%
VA	Suffolk City	1	$27.40	$308.90	8.87%	1	$27.00	8.89%
VA	Virginia Beach	9	$202.30	$1,695.20	11.93%	9	$201.10	12.15%
VA Recap: 55 stores with sales of $1.66 billion. Total retail food sales for VA in the study: $25.55 billion. Harris Teeter share of VA is 6.78%.								

Mid-Atlantic Recap: 78 stores with sales of $2.4 billion annually. Mid-Atlantic retail food sales total: $57.1 billion.
Harris Teeter Per Store Average: $30.72 million

Source: *Food World*, June 2022


stcr
Leave the hammer at home...
DIY JUST GOT A WHOLE LOT EASIER
Open
Self Checkout is the way that pays – get a return on your investment in as fast as 15 Months!
At STCR Your Success Is Our Business
REQUEST A DEMO AT STCR.COM | (607) 757-0181

IN REVIEW: GIANT FOOD

State	County	2022 Stores	2022 Sales (in millions)	2022 County Food Sales	% of 2022 County Market	2021 Stores	2021 Sales (in millions)	% of 2021 County Market
DC	Washington	7	$279.80	$2,478.30	11.29%	7	$282.40	11.70%
DC Recap: 7 stores with sales of $279.8 million. Total retail food sales for DC in the study: $2.48 billion. Giant Food share of DC is 11.29%.								
DE	Sussex	3	$174.93	$1,002.10	17.46%	3	$172.66	17.87%
DE Recap: 3 stores with sales of $174.93 million. Total retail food sales for DE in the study: $1.53 billion. Giant Food share of DE is 11.45%.								
MD	Anne Arundel	9	$434.38	$2,327.80	18.66%	9	$441.80	19.42%
MD	Baltimore City	7	$284.71	$1,529.60	18.61%	7	$285.91	18.81%
MD	Baltimore County	14	$570.46	$3,450.20	16.53%	14	$545.20	16.65%
MD	Calvert	3	$147.77	$398.40	37.09%	3	$146.78	37.90%
MD	Carroll	1	$40.45	$689.10	5.87%	1	$39.16	5.91%
MD	Charles	2	$85.59	$525.20	16.30%	2	$86.47	16.75%
MD	Frederick	3	$122.26	$967.00	12.64%	3	$117.78	12.98%
MD	Harford	2	$80.00	$1,036.90	7.72%	2	$78.29	7.67%
MD	Howard	7	$272.95	$1,203.10	22.69%	7	$281.30	23.94%
MD	Montgomery	26	$1,007.22	$3,765.80	26.75%	26	$1,016.72	27.93%
MD	Prince George's	17	$604.67	$3,223.10	18.76%	17	$595.69	19.31%
MD	St. Mary's	1	$35.34	$391.30	9.03%	1	$37.45	9.44%
MD	Talbot	1	$36.36	$227.80	15.96%	1	$36.96	17.02%
MD Recap: 93 stores with sales of $2.7 billion. Total retail food sales for MD in the study: $21.57 billion. Giant Food share of MD is 17.25%.								
VA	Albemarle	1	$35.22	$677.40	5.20%	1	$35.70	5.56%
VA	Arlington	4	$111.98	$963.20	11.63%	4	$114.14	12.02%
VA	Fairfax	29	$1,001.13	$5,478.40	18.27%	29	$1,064.02	19.96%
VA	Fauquier	1	$38.81	$188.40	20.60%	1	$32.69	18.48%
VA	Loudoun	9	$249.03	$1,536.10	16.21%	9	$258.70	17.57%
VA	Prince William	8	$218.27	$1,937.20	11.27%	7	$218.61	11.78%
VA	Spotsylvania	2	$91.58	$822.80	11.13%	2	$89.67	11.68%
VA	Stafford	3	$117.70	$437.90	26.88%	3	$119.66	27.93%
VA Recap: 57 stores with sales of $1.86 billion. Total retail food sales for VA in the study: $25.55 billion. Giant Food share of VA is 7.59%.								

Mid-Atlantic Recap: 160 stores with sales of $6.04 billion annually. Mid-Atlantic retail food sales total: $57.1 billion.
Giant Food Per Store Average: $ 37.75 million

Source: *Food World*, June 2022

IN REVIEW: COSTCO

State	County	2022 Stores	2022 Sales (in millions)	2022 County Food Sales	% of 2022 County Market	2021 Stores	2021 Sales (in millions)	% of 2021 County Market
DC	Washington	1	$66.10	$2,478.30	2.67%	1	$60.80	2.52%
DC Recap: 1 store with sales of $66.1 million. Total retail food sales for DC in the study: $2.48 billion. Costco share of DC is 2.67%.								
MD	Anne Arundel	2	$117.20	$2,327.80	5.03%	2	$106.10	4.66%
MD	Baltimore County	2	$126.80	$3,450.20	3.68%	2	$114.70	3.50%
MD	Frederick	1	$55.40	$967.00	5.73%	1	$51.10	5.63%
MD	Howard	1	$60.10	$1,203.10	5.00%	1	$54.90	4.67%
MD	Montgomery	2	$175.40	$3,765.80	4.66%	2	$160.50	4.41%
MD	Prince George's	3	$180.20	$3,223.10	5.59%	3	$163.80	5.31%
MD Recap: 11 stores with sales of $715.1 million. Total retail food sales for MD in the study: $21.57 billion. Costco share of MD is 3.31%.								
PA	Dauphin	1	$54.80	$1,067.10	5.14%	1	$50.70	4.96%
PA	Lancaster	1	$33.70	$1,852.90	1.82%	1	$31.80	1.83%
PA Recap: 2 stores with sales of $88.5 million. Total retail food sales for PA in the study: $6.99 billion. Costco share of PA is 1.27%.								
VA	Albemarle	1	$40.40	$677.40	5.96%	1	$37.60	5.86%
VA	Arlington	1	$73.40	$963.20	7.62%	1	$66.80	7.03%
VA	Chesterfield	1	$53.20	$1,500.20	3.55%	1	$47.10	3.26%
VA	Fairfax	4	$384.20	$5,478.40	7.01%	4	$357.30	6.70%
VA	Frederick	1	$58.70	$522.40	11.24%	1	$55.20	11.12%
VA	Hampton/Newport News	1	$40.20	$1,333.70	3.01%	1	$37.10	3.31%
VA	Henrico	1	$48.40	$1,970.40	2.46%	1	$43.90	2.30%
VA	Loudoun	2	$163.40	$1,536.10	10.64%	2	$148.20	10.07%
VA	Norfolk City	1	$48.30	$790.50	6.11%	1	$44.10	5.84%
VA	Prince William	2	$84.50	$1,937.20	4.36%	2	$76.50	4.12%
VA	Spotsylvania	1	$34.40	$822.80	4.18%	1	$31.20	4.06%
VA Recap: 16 stores with sales of $1.03 billion. Total retail food sales for VA in the study: $25.55 billion. Costco share of VA is 4.19%.								

Mid-Atlantic Recap: 30 stores with sales of $1.9 billion annually. Mid-Atlantic retail food sales total: $57.1 billion.
Costco Per Store Average: $63.27 million

Source: *Food World*, June 2022

TAKING STOCK

from page 38

made in e-commerce, procurement, technology, and own brands can be credited to Chris's leadership."

A successor has not yet been named and a search for a qualified candidate will begin shortly.

'Round The Trade

I believe there's reason to be concerned with recent Q1 financial reports from the nation's two largest mass merchants – Walmart and Target – which both posted solid comp store sales gains but saw earnings plummet noticeably. Actually, Target's profits sank. The Minneapolis retailer, while posting a solid 3.3 percent comp-store revenue gain, saw net earnings dip from $2.1 billion in last year's first quarter to $1.01 billion for the period ended May 1. Moreover, gross margins dropped more than 400 basis points from 30.9 percent to 26.7 percent. "Throughout the quarter, we faced unexpectedly high costs, driven by a number of factors, resulting in profitability that came in well below our expectations, and well below where we expect to operate over time," Target CEO Brian Cornell stated. Among the "factors" Cornell noted was the stress of dealing with the continued supply chain dysfunction. Within days of that release, came an announcement that the large national retailer would immediately begin canceling orders from suppliers (some grocery, but primarily in clothing and home goods) as it seeks to radically reduce existing inventories. Target cited a shift in spending habits by its customers - an increase in travel and more eating away from home - and rapidly rising costs, particularly in labor and transportation. "Retail inventories are elevated," said Michael Fiddelke, Tar-Jay's CFO. "And they certainly are for us, in some categories that we misforecast. We determined that acting aggressively was the right way to continue to fuel the business." And while rival Walmart has not yet announced any order stoppages, its earnings also dipped even as comp store revenue remained solid at 1.8 percent. Much like Target, earnings decreased from $2.74 billion last year to $2.05 billion for the 13 weeks ended March 31. At a call with financial analysts following the sales and earnings report release, CEO Doug McMillon was none too pleased, explaining, "We're not happy with the profit performance for the quarter." Later on during the call the 55 year old leader said, "The rate of inflation in food pulled away more dollars in GM than expected," while noting that he's witnessed some trading down on grocery from national brands to private label. He added that heightened food inflation has become a persistently thorny issue for the world's largest merchant and biggest food retailer. "I'm concerned that inflation may continue to increase," McMillon proclaimed. Predictably, for the first time since the COVID pandemic began to impact people's lives and businesses nearly 30 months ago, we're seeing a few cracks in the record breaking profit performances of industry leaders. While sales have not yet been severely impacted, that day may not be far off. And while Cornell and McMillon did not address the issue directly, there's a growing feeling among retailers that manufacturers are taking price increase liberties beyond the supply chain difficulties which are real and painful for everybody. "Of course, labor and transportation costs have spiraled and production remains impacted to a degree because of continued labor shortages and some challenges with raw materials and commodities. But at the rate we're seeing these price increases hitting us monthly – and we're not talking about nickels and dimes – my belief is that some suppliers are gilding the lily," said a senior VP-merchandising at one of the Northeast's largest retailers. We talked to 10 other retailers and all agreed with that statement to differing degrees. More Walmart news: the Behemoth announced that it will open four new "first generation" fulfillment centers over the next two years that prioritize the utilization of robotics and machine learning. The new DCs, which are expected to add 4,000 new jobs, will be located in Joliet, IL; McCordsville, IN; Lancaster, TX; and Greencastle, PA (Franklin County). Walmart is taking a page out of Amazon's book by expanding the role of its physical stores to make them mobile fulfillment centers. According to a story on CNBC, Walmart's 4,700 U. S. stores could be used to enhance its e-commerce business by serving as bases for drone deliveries as well as departure locations for its fledgling direct refrigerator drop off business. The story adds that other future services could include packing and shipping goods to households and for Walmart's growing third-party business. According to Tom Ward, the retailer's chief e-commerce

TAKING STOCK continues on page 57

NEW SUPERMARKET, CLUB STORE & MASS MERCHANT OPENINGS

in the Food World Area

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

Aldi	7	Washington, DC (Fort Totten); Milford, DE; Millsboro, DE; Fort Washington, MD; North Bethesda, MD; Severna Park, MD*; Sterling, VA*
Amazon Fresh	13	Washington, DC (3 – H St., First St., Dupont Circle); Chevy Chase, MD (Connecticut Ave.); Gaithersburg, MD; White Oak, MD; Arlington, VA; Bailey's Crossroads, VA; Fairfax, VA*; Falls Church, VA; Lorton, VA*; Manassas, VA*; Springfield, VA
BJ's Wholesale Club	1	Midlothian, VA
Giant Food	5	Baltimore, MD (2 - Fort Ave., Wilkins Ave. (e); Bethesda, MD (r); Crofton, MD (r); Silver Spring, MD (r);
Global Food Market	1	Baltimore, MD (Security Blvd.)
Grocery Outlet	1	Hagerstown, MD*
Harris Teeter	4	Washington, DC (Howard Univ.); Kent Island, MD; Arlington, VA (r); Falls Church, VA
Lidl	10	Washington, DC (3 - Naylor Rd., Upton Place, Columbia Heights); Bear, DE; Baltimore, MD (Northwood Commons); Bethesda, MD; Reisterstown, MD; Stafford, VA; Haymarket ,VA*; McLean, VA*
MOMs Organic Market	2	Washington, DC (Van Ness); Silver Spring, MD
Publix	3	Norfolk, VA; Spotsylvania, VA; Suffolk, VA
Redner's Markets	1	Lewes, DE
Target	1	Arlington, VA (Pentagon City)*
Trader Joe's	1	College Park, MD
Wegmans	5	Washington, DC (Wisconsin Ave.); Greenville, DE; Rockville, MD; Alexandria, VA (Eisenhower Hwy.)*; Reston, VA
Whole Foods	2	Falls Church, VA (1- E. Broad St. & N. Washington); Woodbridge, VA

(r) - replacement store

(e) - store expansion

* Store opened between 4/1/22 - 6/26/22

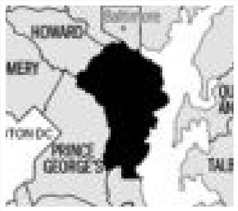
Source: *Food World*, June 2022


PIEROGIES
CELEBRATING
70
YEARS
of the
STUFF YOU LOVE!
Pierogy passion has been around since 1952!
We are grateful to our retail partners and our customers who have made room for us at their dinner table over the past 70 years. We look forward to bringing a whole lot of happiness to your mealtime with delicious pierogies that will make your family smile for years to come!
FAMILY FAVORITE SINCE 1952
Mrs.T's
Pierogies
classic cheddar
AGED SHARP CHEDDAR CHEESE & CREAMY WHIPPED POTATOES WRAPPED IN TENDER PASTA
MADE IN BATCHES
KEEP FROZEN
COOKS IN MINUTES
NET WT. 16 OZ (1 LB) 456g
12 PIEROGIES
FAMILY FAVORITE SINCE 1952
Mrs.T's
mini
Pierogies
4 cheese medley
AGED CHEDDAR, PARMESAN, ROMANO & SWISS CHEESES AND CREAMY WHIPPED POTATOES WRAPPED IN TENDER PASTA
MADE IN BATCHES
KEEP FROZEN
COOKS IN MINUTES
28 PIEROGIES
Mrs.T's
Pierogies
mrstspierogies.com
©2022 ateeco, inc.

MARYLAND COUNTY SHARE OF MARKET: 2022

Total sales for those Maryland counties included in this study are $21.57 billion

ANNE ARUNDEL COUNTY ($2.3 billion)



(Includes Annapolis, Brooklyn Park, Glen Burnie, Linthicum)

- Population 590,330
- # of Households 213,122
- Median Income $103,225
- Under age 18.................... 22.30%
- Over age 65...................... 15.00%
- Female 50.50%
- White 66.70%
- Black............................... 18.30%
- Hispanic 8.40%
- Asian................................. 4.20%

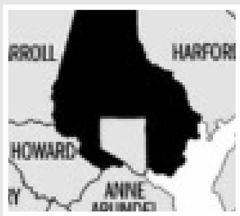
Rank	Company	Stores	Sales (in millions)	% of Market
1	Giant Food	9	$434.38	18.66%
2	Albertsons (Safeway)	8	$231.50	9.95%
3	Walmart (SuperCenter)	4	$153.20	6.58%
4	CVS	22	$119.50	5.13%
5	Costco	2	$117.20	5.03%
6	Sam's Club	3	$107.30	4.61%
7	Target	5	$105.60	4.54%
8	7-Eleven	48	$98.10	4.21%
9	Wegmans	1	$88.80	3.81%
10	Shoppers	2	$70.10	3.01%
11	Food Lion	5	$68.90	2.96%
12	Walgreens	16	$63.10	2.71%
13	Aldi	6	$55.10	2.37%
14	Military Commissaries	2	$53.34	2.29%
15	Whole Foods	1	$52.60	2.26%
16	Wawa	8	$50.20	2.16%
17	Weis Markets	3	$46.80	2.01%
18	BJ's Wholesale Club	1	$42.40	1.82%
19	B. Green (Green Valley)	2	$42.00	1.80%
20	Royal Farm Stores	19	$40.20	1.73%
21	C&S Independents	7	$38.90	1.67%
22	Harris Teeter	1	$36.10	1.55%
23	International Markets	2	$31.70	1.36%
24	Geresbeck's Food Market	2	$21.70	0.93%
25	Graul's	2	$20.60	0.88%
26	Trader Joe's	1	$20.50	0.88%
27	Sprouts	1	$17.20	0.74%
28	The Fresh Market	1	$16.60	0.71%
29	Great Valu	2	$16.00	0.69%
30	Lidl	2	$14.60	0.63%
31	Dash-In	9	$14.30	0.61%
32	High's/Baltimore	7	$11.20	0.48%
33	Rite Aid	3	$9.80	0.42%
34	Save-A-Lot	1	$4.80	0.21%
		208	**$2,314.32**	**99.42%**

BALTIMORE CITY ($1.5 billion)

- Population 576,498
- # of Households 242,499
- Median Income $52,164
- Under age 18.................... 20.20%
- Over age 65...................... 14.50%
- Female 53.10%
- White 27.70%
- Black............................... 62.70%
- Hispanic 5.70%
- Asian................................. 2.70%

Rank	Company	Stores	Sales (in millions)	% of Market
1	Giant Food	7	$284.71	18.61%
2	Walgreens	19	$134.80	8.81%
3	B. Green (Food Depot)	5	$128.50	8.40%
4	CVS	16	$92.80	6.07%
5	Albertsons (Safeway)	3	$89.10	5.83%
6	Save-A-Lot	8	$83.20	5.44%
7	7-Eleven	41	$82.70	5.41%
8	Harris Teeter	2	$82.00	5.36%
9	Whole Foods	2	$67.80	4.43%
10	Royal Farm Stores	24	$56.70	3.71%
11	ShopRite (Price Rite/Klein's)	2	$51.80	3.39%
12	Rite Aid	10	$46.90	3.07%
13	International Markets	6	$46.40	3.03%
14	Shoppers	2	$42.10	2.75%
15	BJ's Wholesale Club	1	$35.90	2.35%
16	Aldi	4	$25.90	1.69%
17	Streets Market	3	$25.20	1.65%
18	Target	1	$22.30	1.46%
19	Sprouts	1	$17.20	1.12%
20	MOM's Organic Market	1	$15.20	0.99%
21	Wawa	2	$11.90	0.78%
22	Eddie's of Roland Park	1	$11.40	0.75%
23	Compare Foods	2	$8.90	0.58%
24	Circle K	2	$4.10	0.27%
25	Dash-In	1	$2.60	0.17%
26	High's/Baltimore	1	$2.30	0.15%
27	C&S Independents	2	$1.10	0.07%
28	Great Valu	0	$0.00	0.00%
		169	**$1,473.51**	**96.33%**

BALTIMORE COUNTY ($3.4 billion)



(Includes Catonsville, Dundalk, Randallstown, Reisterstown)

- Population 849,316
- # of Households 315,347
- Median Income $78,724
- Under age 18.................... 21.60%
- Over age 65...................... 17.60%
- Female 52.70%
- White 55.80%
- Black............................... 30.30%
- Hispanic 5.80%
- Asian................................. 6.30%

Rank	Company	Stores	Sales (in millions)	% of Market
1	Giant Food	14	$570.46	16.58%
2	Walmart (SuperCenter)	9	$346.90	10.08%

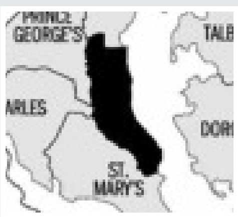
See **MARYLAND COUNTY SHARE** on page 50


Celebrating
36
Years!
Innovations in Fresh Cut & Produce
LANCASTER
Best Quality, Fastest Service
Serving the Eastern Seaboard Region
• Full-line Conventional & Organic Produce
• Full-line Specialty/Ethnic Produce
• Conventional & Organic Fresh Cut
• Forward Distribution
• Private Label
• Full-line Salad Processor
• Locally Grown
• Deliveries 7 Days a Week
410.799.0010 • www.lancasterfoods.com
Lancaster Foods, LLC
7700 Conowingo Avenue P.O. Box 1158, Jessup, MD 20794

MARYLAND COUNTY SHARE OF MARKET: 2022

Continued from page 48

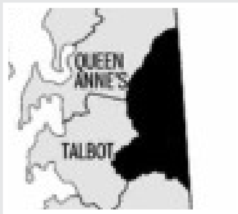
3	Weis Markets	12	$275.81	8.01%
4	Sam's Club	3	$196.30	5.70%
5	Albertsons (Safeway)	7	$167.20	4.86%
6	Walgreens	27	$164.20	4.77%
7	Wegmans	2	$163.20	4.74%
8	CVS	26	$150.70	4.38%
9	International Markets	9	$140.50	4.08%
10	Royal Farm Stores	51	$136.50	3.97%
11	Costco	2	$126.80	3.68%
12	Target	6	$106.80	3.10%
13	ShopRite (PR/Klein's/Village)	4	$105.30	3.06%
14	7-Eleven	41	$88.40	2.57%
15	Shoppers	3	$82.30	2.39%
16	Aldi	11	$73.90	2.15%
17	BJ's Wholesale Club	2	$73.10	2.12%
18	Food Lion	6	$61.10	1.78%
19	Wawa	8	$46.20	1.34%
20	C&S Independents	2	$38.80	1.13%
21	Trader Joe's	2	$36.10	1.05%
22	Graul's	3	$34.10	0.99%
23	Lidl	5	$31.80	0.92%
24	Whole Foods	1	$31.70	0.92%
25	MOM's Organic Market	2	$30.20	0.88%
26	Eddie's of Roland Park	1	$28.60	0.83%
27	Rite Aid	6	$28.50	0.83%
28	The Fresh Market	2	$25.20	0.73%
29	Redner's Markets	1	$24.30	0.71%
30	Sprouts	1	$19.40	0.56%
31	Geresbeck's Food Market	1	$13.20	0.38%
32	High's/Baltimore	6	$9.10	0.26%
33	Dash-In	3	$7.00	0.20%
34	Save-A-Lot	2	$6.00	0.17%
35	Circle K	2	$5.10	0.15%
		284	**$3,447.17**	**100.16%***



CALVERT COUNTY ($398.4 million)
(Includes Dunkirk, Prince Frederick, Solomons)

- Population 93,783
- # of Households 32,558
- Median Income $112,696
- Under age 18 .... 23.00%
- Over age 65 .... 15.50%
- Female 50.40%
- White 77.50%
- Black 13.30%
- Hispanic 4.40%
- Asian 1.90%

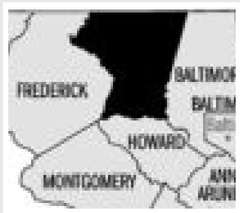
1	Giant Food	3	$147.77	37.09%
2	Albertsons (Safeway)	2	$63.90	16.04%
3	Walmart (SuperCenter)	2	$60.60	15.21%
4	Weis Markets	3	$41.82	10.50%
5	Harris Teeter	1	$21.40	5.37%
6	Wawa	2	$14.90	3.74%
7	CVS	3	$14.60	3.66%
8	7-Eleven	7	$14.20	3.56%
9	Walgreens	2	$11.40	2.86%
10	Dash-In	2	$4.50	1.13%
11	C&S Independents	1	$1.00	0.25%
		28	**$396.09**	**99.42%**



CAROLINE COUNTY ($85.8 million)
(Includes Denton, Federalsburg, Greensboro)

- Population 33,386
- # of Households 12,160
- Median Income $59,042
- Under age 18 .... 23.60%
- Over age 65 .... 16.70%
- Female 51.10%
- White 75.10%
- Black 14.10%
- Hispanic 7.80%
- Asian 1.20%

1	Walmart (SuperCenter)	1	$40.70	47.44%
2	Food Lion	2	$21.10	24.59%
3	Royal Farm Stores	3	$8.30	9.67%
4	Walgreens	1	$5.70	6.64%
5	Save-A-Lot	1	$4.50	5.24%
6	7-Eleven	1	$2.30	2.68%
7	Fas-Marts	1	$2.10	2.45%
		10	**$84.70**	**98.72%**



CARROLL COUNTY ($689.1 million)
(Includes Eldersburg, Manchester, Taneytown, Westminster)

- Population 173,873
- # of Households 61,261
- Median Income $99,569
- Under age 18 .... 21.60%
- Over age 65 .... 17.30%
- Female 50.50%
- White 88.30%
- Black 3.90%
- Hispanic 3.90%
- Asian 2.10%

1	Walmart (SuperCenter)	4	$113.40	16.46%
2	Albertsons (Safeway)	3	$98.20	14.25%
3	Weis Markets	5	$97.01	14.08%
4	The Giant Company (Martin's)	1	$73.78	10.71%
5	Food Lion	3	$43.80	6.36%
6	BJ's Wholesale Club	1	$41.90	6.08%
7	Giant Food	1	$40.45	5.87%
8	CVS	6	$30.60	4.44%
9	Shoppers	1	$20.50	2.97%
10	Walgreens	4	$20.40	2.96%
11	Aldi	2	$17.20	2.50%

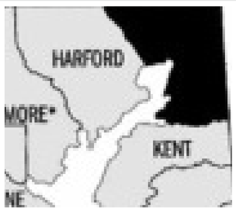
See **MARYLAND COUNTY SHARE** on page 52

Seafood America LLC, 645 Mearns Road Warminster PA 18974— Phone (215) 672-2211 Fax (215) 675-8324
www.docksideclassics.net

MARYLAND COUNTY SHARE OF MARKET: 2022

Continued from page 50

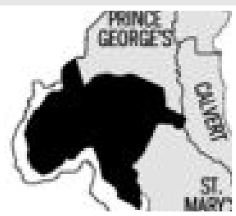
12	Target	1	$14.70	2.13%
13	Royal Farm Stores	4	$13.20	1.92%
14	High's/Baltimore	8	$12.70	1.84%
15	Rite Aid	3	$11.50	1.67%
16	IGA	1	$10.92	1.58%
17	Sheetz	3	$9.60	1.39%
18	Wawa	2	$8.20	1.19%
19	7-Eleven	3	$6.90	1.00%
20	C&S Independents	1	$1.80	0.26%
		57	**$686.76**	**99.66%**



CECIL COUNTY ($289.5 million) (Includes Elkton, Northeast)

- Population 103,905
- # of Households 37,293
- Median Income $79,415
- Under age 18....... 22.50%
- Over age 65....... 16.20%
- Female 50.50%
- White 84.60%
- Black....... 7.30%
- Hispanic 4.70%
- Asian....... 1.40%

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%**

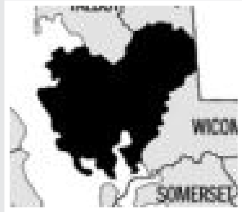


CHARLES COUNTY ($525.2 million) (Includes Bryan's Road, Waldorf)

- Population 93,928
- # of Households 32,558
- Median Income $112,696
- Under age 18....... 23.00%
- Over age 65....... 15.50%
- Female 50.40%
- White 77.50%
- Black....... 13.30%
- Hispanic 4.40%
- Asian....... 1.90%

1	Albertsons (Safeway)	3	$98.01	18.66%
2	Giant Food	2	$85.59	16.30%
3	Walmart	2	$42.80	8.15%
4	CVS	8	$40.10	7.64%
5	Food Lion	3	$38.90	7.41%

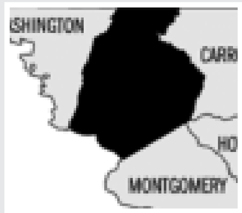
6	BJ's Wholesale Club	1	$37.80	7.20%
7	Sam's Club	1	$34.20	6.51%
8	Target	2	$28.90	5.50%
9	7-Eleven	10	$22.30	4.25%
10	Dash-In	10	$17.90	3.41%
11	Wawa	3	$16.50	3.14%
12	Walgreens	3	$15.60	2.97%
13	MOM's Organic Market	1	$13.10	2.49%
14	Weis Markets	1	$11.68	2.22%
15	Aldi	1	$9.70	1.85%
16	Lidl	1	$7.30	1.39%
		52	**$520.38**	**99.08%**



DORCHESTER COUNTY ($59.5 million) (Includes Cambridge)

- Population 32,489
- # of Households 13,433
- Median Income $52,799
- Under age 18....... 21.00%
- Over age 65....... 22.10%
- Female 52.50%
- White 62.30%
- Black....... 29.00%
- Hispanic 6.10%
- Asian....... 1.20%

1	Walmart (SuperCenter)	1	$26.90	45.21%
2	Food Lion	1	$12.80	21.51%
3	Wawa	1	$6.50	10.92%
4	Walgreens	1	$5.50	9.24%
5	Rite Aid	1	$4.20	7.06%
6	Royal Farm Stores	1	$2.80	4.71%
		6	**$58.70**	**98.66%**

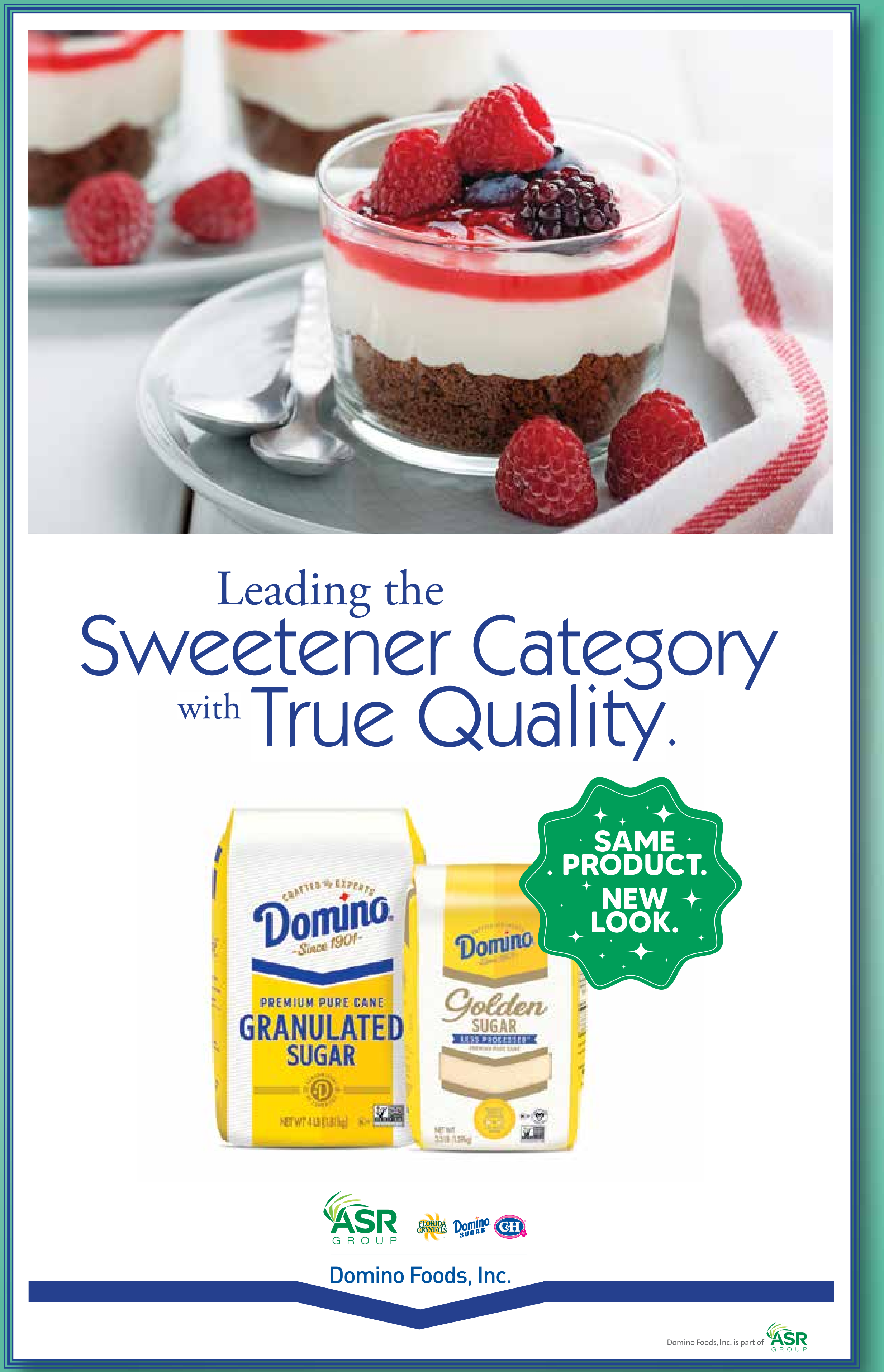


FREDERICK COUNTY ($967 million) (Includes Brunswick, Emmitsburg, Frederick, Thurmont)

- Population 279,835
- # of Households 94,299
- Median Income $100,685
- Under age 18....... 23.10%
- Over age 65....... 14.80%
- Female 50.70%
- White 71.70%
- Black....... 10.70%
- Hispanic 10.50%
- Asian....... 5.00%

1	Weis Markets	6	$140.39	14.52%
2	Giant Food	3	$122.26	12.64%
3	Walmart (SuperCenter)	2	$111.40	11.52%
4	Food Lion	5	$73.10	7.56%
5	Wegmans	1	$72.30	7.48%
6	CVS	12	$65.80	6.80%
7	Costco	1	$55.40	5.73%
8	Giant Eagle (GetGo)	4	$40.40	4.18%
9	Albertsons (Safeway)	2	$35.40	3.66%
10	Sheetz	9	$32.40	3.35%
11	Sam's Club	1	$32.10	3.32%
12	Walgreens	5	$27.20	2.81%

See **MARYLAND COUNTY SHARE** on page 54



Leading the
Sweetener Category
with True Quality.
SAME PRODUCT. NEW LOOK.
Domino
Since 1901
PREMIUM PURE CANE
GRANULATED
SUGAR
Domino
Golden
SUGAR
ASR GROUP
Domino Foods, Inc.
Domino Foods, Inc. is part of ASR GROUP

MARYLAND COUNTY SHARE OF MARKET: 2022

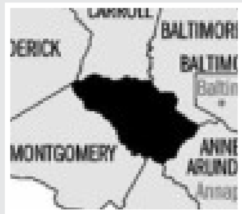
Continued from page 52

13	7-Eleven	14	$24.60	2.54%
14	Royal Farm Stores	6	$22.30	2.31%
15	Aldi	2	$21.10	2.18%
16	Target	1	$16.10	1.66%
17	International Markets	1	$13.20	1.37%
18	MOM's Organic Market	1	$12.90	1.33%
19	Wawa	3	$12.20	1.26%
20	Lidl	1	$7.80	0.81%
21	C&S Independents	2	$7.40	0.77%
22	Military Commissaries	1	$6.68	0.69%
23	High's/Baltimore	4	$6.10	0.63%
24	Rutter's Farm Stores	1	$2.10	0.22%
25	Circle K	1	$2.00	0.21%
26	Dash-In	1	$1.80	0.19%
		90	**$964.43**	**99.73%**

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

- Population 262,977
- # of Households 95,094
- Median Income $94,003
- Over age 65...................... 22.20%
- Female 16.60%
- White 51.00%
- White 75.10%
- Black............................... 14.80%
- Hispanic 4.80%
- Asian................................. 3.10%

1	ShopRite (Klein's)	6	$228.40	22.03%
2	Walmart (SuperCenter)	3	$94.60	9.12%
3	Wegmans	1	$92.40	8.91%
4	Giant Food	2	$80.00	7.72%
5	Walgreens	11	$56.90	5.49%
6	Target	3	$53.80	5.19%
7	Weis Markets	2	$48.78	4.70%
8	Wawa	9	$47.60	4.59%
9	Royal Farm Stores	17	$46.50	4.48%
10	BJ's Wholesale Club	1	$42.80	4.13%
11	CVS	8	$35.20	3.39%
12	Redner's Markets	2	$34.00	3.28%
13	Albertsons (Safeway)	1	$31.40	3.03%
14	7-Eleven	17	$24.70	2.38%
15	Aldi	3	$20.20	1.95%
16	Family Owned Markets	1	$19.23	1.85%
17	Sprouts	1	$16.70	1.61%
18	Rite Aid	4	$12.50	1.21%
19	High's/Baltimore	7	$11.80	1.14%
20	Food Lion	2	$10.60	1.02%
21	Military Commissaries	1	$9.52	0.92%
22	Lidl	1	$8.80	0.85%
23	Save-A-Lot	1	$5.60	0.54%
24	Sheetz	1	$3.10	0.30%
25	C&S Independents	1	$0.60	0.06%
		106	**$1,035.73**	**99.89%**



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

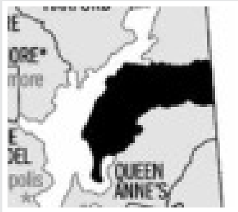
- Population 334,529
- # of Households 116,457
- Median Income $124,042
- Under age 18.................... 24.20%
- Over age 65...................... 14.30%
- Female 51.10%
- White 50.30%
- Black................................ 20.40%
- Hispanic 7.30%
- Asian................................ 19.30%

1	Giant Food	7	$272.95	22.69%
2	Harris Teeter	3	$113.20	9.41%
3	Wegmans	1	$102.70	8.54%
4	Albertsons (Safeway)	3	$75.30	6.26%
5	Walmart (SuperCenter)	2	$74.20	6.17%
6	Weis Markets	3	$60.27	5.01%
7	Costco	1	$60.10	5.00%
8	International Markets	3	$56.30	4.68%
9	Target	2	$44.30	3.68%
10	CVS	9	$43.90	3.65%
11	Whole Foods	1	$37.00	3.08%
12	BJ's Wholesale Club	1	$34.00	2.83%
13	Trader Joe's	1	$29.00	2.41%
14	Walgreens	5	$28.20	2.34%
15	B. Green (Green Valley)	1	$24.90	2.07%
16	Food Lion	2	$22.30	1.85%
17	Sprouts	1	$19.80	1.65%
18	7-Eleven	10	$17.10	1.42%
19	Royal Farm Stores	6	$15.00	1.25%
20	MOM's Organic Market	1	$14.30	1.19%
21	Aldi	1	$12.10	1.01%
22	High's/Baltimore	8	$12.00	1.00%
23	Roots Markets	1	$11.50	0.96%
24	Lidl	1	$8.10	0.67%
25	Rite Aid	1	$4.50	0.37%
26	Circle K	2	$4.00	0.33%
27	Dash-In	1	$2.20	0.18%
		78	**$1,199.22**	**99.68%**

See **MARYLAND COUNTY SHARE** on page 56

MARYLAND COUNTY SHARE OF MARKET: 2022

Continued from page 54



KENT COUNTY ($102.1 million)
(Includes Chestertown, Worton)

- Population 19,270
- # of Households 8,274
- Median Income $60,208
- Under age 18.................... 15.40%
- Over age 65...................... 27.10%
- Female 51.90%
- White 77.80%
- Black............................... 14.90%
- Hispanic 4.50%
- Asian................................. 1.40%

1	Redner's Markets	1	$25.30	24.78%
2	Walgreens	2	$21.60	21.16%
3	Albertsons (Safeway)	1	$20.10	19.69%
4	Food Lion	1	$15.80	15.48%
5	Royal Farm Stores	2	$5.70	5.58%
6	C&S Independents	2	$5.30	5.19%
7	7-Eleven	1	$2.90	2.84%
8	Fas-Marts	1	$2.00	1.96%
9	High's/Baltimore	1	$2.00	1.96%
		12	**$100.70**	**98.63%**

MONTGOMERY COUNTY ($3.8 billion)
(Includes Bethesda, Gaithersburg, Germantown, Rockville)

- Population 1054,827
- # of Households 372,825
- Median Income $111,812
- Under age 18.................... 23.10%
- Over age 65...................... 16.10%
- Female 51.60%
- White 42.90%
- Black............................... 20.10%
- Hispanic 20.10%
- Asian............................... 15.60%

1	Giant Food	26	$1,007.22	26.75%
2	Albertsons (Safeway)	19	$508.30	13.50%
3	CVS	43	$433.70	11.52%
4	International Markets	20	$338.60	8.99%
5	Whole Foods (Amazon Fresh)	6	$242.30	6.43%
6	Harris Teeter	7	$185.10	4.92%
7	Costco	2	$175.40	4.66%
8	7-Eleven	68	$148.30	3.94%
9	Trader Joe's	5	$140.10	3.72%
10	Target	6	$127.60	3.39%
11	Wegmans	1	$99.90	2.65%
12	Walgreens	13	$74.80	1.99%
13	Aldi	8	$70.20	1.86%
14	Sam's Club	1	$43.40	1.15%
15	Walmart	1	$37.90	1.01%
16	MOM's Organic Market	2	$33.20	0.88%
17	Weis Markets	2	$25.59	0.68%
18	Lidl	3	$15.30	0.41%
19	Streets Market (Snider's)	1	$13.10	0.35%
20	Food Lion	1	$11.50	0.31%
21	Roots Markets	1	$11.10	0.29%
22	The Fresh Market	1	$9.10	0.24%
23	Military Commissaries	1	$6.04	0.16%
24	Royal Farm Stores	1	$4.10	0.11%
25	Circle K	1	$2.20	0.06%
26	Dash-In	1	$2.00	0.05%
27	C&S Independents	3	$1.90	0.05%
		244	**$3,767.95**	**100.06%***

PRINCE GEORGE'S COUNTY ($3.2 billion)
(Includes Bowie, Clinton, College Park, Hyattsville, Laurel, Oxon Hill)

- Population 955,306
- # of Households 315,634
- Median Income $86,994
- Under age 18.................... 22.10%
- Over age 65...................... 13.90%
- Female 51.90%
- White 12.30%
- Black............................... 64.40%
- Hispanic 19.50%
- Asian................................. 4.40%

1	Giant Food	17	$604.67	18.76%
2	International Markets	23	$369.40	11.46%
3	CVS	49	$276.50	8.58%
4	Albertsons (Safeway)	9	$268.80	8.34%
5	Shoppers	9	$261.80	8.12%
6	Target	9	$222.00	6.89%
7	Costco	3	$180.20	5.59%
8	7-Eleven	67	$143.40	4.45%
9	Aldi	12	$102.50	3.18%
10	Wegmans	1	$95.60	2.97%
11	Walmart	4	$83.10	2.58%
12	BJ's Wholesale Club	2	$80.00	2.48%
13	Walgreens	12	$69.50	2.16%
14	Food Lion	3	$40.80	1.27%
15	Lidl	5	$40.60	1.26%
16	Harris Teeter	2	$40.40	1.25%
17	Royal Farm Stores	11	$39.40	1.22%
18	Wawa	6	$37.10	1.15%
19	Weis Markets	3	$36.20	1.12%
20	Whole Foods	1	$33.10	1.03%
21	Military Commissaries	1	$32.32	1.00%
22	MOM's Organic Market	2	$29.10	0.90%
23	Save-A-Lot	4	$18.10	0.56%
24	Dash-In	8	$17.10	0.53%
25	ShopRite (Price Rite)	1	$16.20	0.50%
26	ASG (Compare)	3	$13.75	0.43%

See **MARYLAND COUNTY SHARE** on page 58

TAKING STOCK

from page 45

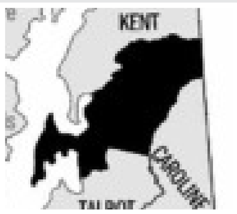
officer, "If a store acts as a fulfillment center, we can send those items the shortest distance in the fastest time." And Walmart also has big plans for its drone capabilities, announcing earlier this month that it is expanding its drone delivery capacity to 4 million households (1 million packages annually) in six states including Virginia. In case you were curious, each drone can carry up to 10 pounds of merchandise…Amazon will finally be launching the long-awaited "Prime Air" drone service, testing the initiative in a small town – Lockeford, CA, near Sacramento - later this year. "Godzilla" first received FAA approval to fly drones in 2020. Yes, there's more Amazon news, too: the Seattle-based juggernaut late last month announced a 20-to-1 stock split, its first share split since 1999. As with most companies that go the "split" route, Amazon is seeking to provide shareholders (and potential holders) with a more affordable share price. To wit, utilizing pre-split numbers, as of June 14, Amazon's stock price was $2,060 per share (approx. $102 per share at the new price). That's a big number but noticeably less than the company's 52-week high of $3,773 per share ($188.65 at the new price). If you're concerned that this financial move emanated from a slight sense of desperation, think again. For its full fiscal 2021, Amazon's total sales were $470 billion, up 22 percent year-over-year. And it earned $33.4 billion in profit, a jump of 56 percent, in FY '20. Don't cry for me Jeff Bezos! According to research firm Edge by Ascential, "Godzilla" will overtake the "Bentonville Behemoth" to become the largest retailer in the U.S. by 2024. One more important piece of Amazon news concerns Dave Clark, who last month announced his resignation as CEO of the company's worldwide consumer business, saying he will join global supply chain software firm Flexport, effective September 1. Clark was highly regarded at Amazon and is generally credited with developing Amazon's warehouse network from only a few locations to a massive network of facilities serving the company internationally and in the U.S.…e-commerce analytics firm Brick Meets Click/Mercatus reported that online grocery sales once again decreased in May (based on year-over-year revenue), following a trend that began earlier in 2022. The drop in online sales shouldn't be that shocking considering how robust digital volume was during the first of the pandemic. But the level of decline – 12.3 percent last month and 6.9 percent in April – surprised some observers. The one bright area in the e-commerce matrix is the sales gains made in pickup which gained 9 percentage points when compared to May 2021. Sylvain Perrier, CEO of Toronto-based Mercatus, offered these insightful comments: " Customers appreciate the convenience of ordering online, but they are also becoming more cost-conscious. So, to defend the base business, grocers can promote pickup to address both issues. Assuming the pickup aligns with customer expectations, showcasing the savings associated with pickup's lower fees, no fuel charges, or zero tips can better protect your online customers and sales by highlighting a more affordable alternative to home delivery."…and customers are certainly becoming more cost-conscious as witnessed by the beginning of "trading down" shopping patterns and also in a recent Washington Post survey that reported that most Americans expect inflation to worsen and have begun adjusting their spending habits to adapt to rising costs. The survey notes that 9 in 10 Americans have begun hunting for cheaper prices and nearly 75 of those polled are reducing their spending on entertainment and out-of-home dining…one of the more noticeable trends of the last three years is the disclosure (and touting) of publicly-traded companies' ESG (Environmental, Social and Governance) performances. This in general has been a very good thing as companies are openly reporting on their improved efforts in protecting the environment and improving their social responsibilities. But the skeptic that I am has also wondered how much "window dressing" some of these firms are adding to their ESG reporting. Now, the Securities and Exchange Commission (SEC) wants publicly-held companies to disclose more detailed information about the "do-gooder" stuff they're claiming. Recently, Walmart was fined for incorrectly claiming some clothing they were selling was environmentally sound, when in fact it wasn't. Soon, we'll hopefully see how much "greenwash" is actually "eyewash."…Mark "Everything I Touch Turns To Gold" Lore is at it again, The serial entrepreneur who founded online diaper service Quidsi (and sold it to Amazon for $500 million in 2010) and jet.com (which he sold to Walmart for $3.3 billion in 2016) has just raised another $350 million for his latest project, the Wonder Group, a food delivery startup that is building a network of food trucks that can in essence create a portable ghost kitchen for

TAKING STOCK continues on page 61

MARYLAND COUNTY SHARE OF MARKET: 2022

Continued from page 56

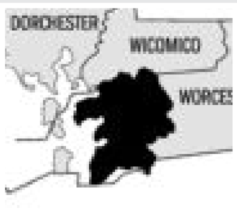
27	C&S Independents	5	$10.10	0.31%
28	Circle K	1	$1.80	0.06%
		273	**$3,163.54**	**98.15%**



QUEEN ANNE'S COUNTY ($158.9 million) (Includes Centreville, Chester, Stevensville)

- Population 50,798
- # of Households 19,000
- Median Income $96,467
- Under age 18 .... 21.40%
- Over age 65 .... 19.20%
- Female 50.40%
- White 86.30%
- Black 6.30%
- Hispanic 4.30%
- Asian 1.20%

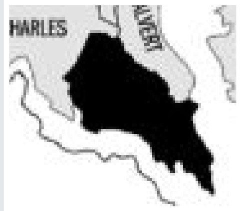
1	Albertsons (Safeway)	2	$63.90	40.21%
2	Food Lion	2	$24.30	15.29%
3	Target	1	$19.60	12.33%
4	Walgreens	2	$12.60	7.93%
5	Royal Farm Stores	3	$8.60	5.41%
6	7-Eleven	3	$7.40	4.66%
7	CVS	1	$5.80	3.65%
8	Wawa	1	$5.10	3.21%
9	Fas-Marts	2	$3.90	2.45%
10	Rite Aid	1	$3.60	2.27%
11	Dash-In	1	$2.30	1.45%
		19	**$157.10**	**98.87%**



SOMERSET COUNTY ($40.2 million) (Includes Crisfield)

- Population 24,584
- # of Households 8,509
- Median Income $44,980
- Under age 18 .... 16.90%
- Over age 65 .... 17.30%
- Female 45.90%
- White 51.40%
- Black 41.50%
- Hispanic 4.00%
- Asian 1.40%

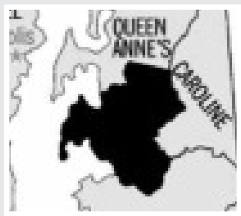
1	Food Lion	2	$26.40	65.67%
2	Rite Aid	1	$3.20	7.96%
3	Royal Farm Stores	1	$2.80	6.97%
4	Dash-In	1	$2.40	5.97%
5	Fas-Marts	1	$2.10	5.22%
		6	**$36.90**	**91.79%**



ST. MARY'S COUNTY ($391.3 million) (Includes Charlotte Hall, Leonardtown, Lexington Park)

- Population 114,468
- # of Households 41,280
- Median Income $95,864
- Under age 18 .... 23.90%
- Over age 65 .... 13.40%
- Female 50.00%
- White 73.50%
- Black 14.90%
- Hispanic 5.60%
- Asian 2.90%

1	McKay's Food & Drug	4	$60.30	15.41%
2	Walmart (SuperCenter)	1	$56.00	14.31%
3	BJ's Wholesale Club	1	$38.40	9.81%
4	Giant Food	1	$35.34	9.03%
5	Food Lion	2	$30.00	7.67%
6	Wawa	4	$27.90	7.13%
7	Harris Teeter	1	$27.40	7.00%
8	CVS	6	$26.50	6.77%
9	Weis Markets	2	$25.23	6.45%
10	Target	1	$15.80	4.04%
11	Military Commissaries	1	$12.39	3.17%
12	Walgreens	3	$11.90	3.04%
13	Aldi	1	$7.90	2.02%
14	Sheetz	2	$6.80	1.74%
15	Dash-In	2	$4.00	1.02%
16	7-Eleven	1	$2.30	0.59%
		33	**$388.16**	**99.20%**



TALBOT COUNTY ($227.8 million) (Includes Easton, St. Michael's)

- Population 37,626
- # of Households 16,810
- Median Income $73,102
- Under age 18 .... 18.20%
- Over age 65 .... 29.70%
- Female 52.70%
- White 77.40%
- Black 12.80%
- Hispanic 7.20%
- Asian 1.40%

1	Giant Food	1	$36.36	15.96%
2	BJ's Wholesale Club	1	$35.50	15.58%
3	Harris Teeter	1	$26.40	11.59%
4	Walmart (SuperCenter)	1	$22.20	9.75%
5	Albertsons (Acme)	1	$20.30	8.91%
6	Target	1	$17.70	7.77%
7	Weis Markets	1	$10.85	4.76%
8	Graul's	1	$10.20	4.48%
9	Aldi	1	$8.40	3.69%
10	CVS	2	$7.70	3.38%
11	Royal Farm Stores	2	$7.20	3.16%
12	Walgreens	1	$5.10	2.24%
13	Wawa	1	$4.80	2.11%
14	7-Eleven	2	$4.60	2.02%

See **MARYLAND COUNTY SHARE** on page 64

IN REVIEW: ALBERTSONS MID-ATLANTIC

State	County	2022 Stores	2022 Sales (in millions)	2022 County Food Sales	% of 2022 County Market	2021 Stores	2021 Sales (in millions)	% of 2021 County Market
DC	Washington (Safeway)	12	$372.50	$2,478.30	15.03%	12	$354.73	14.69%
DC Recap: 12 stores with sales of $372.5 million. Total retail food sales for DC in the study: $2.48 billion. Albertsons Mid-Atlantic share of DC is 15.03%.								
DE	Kent (Acme/Safeway)	2	$56.50	$525.60	10.75%	2	$53.98	10.47%
DE	Sussex (Acme/Safeway)	2	$65.70	$1,002.10	6.56%	2	$62.52	6.47%
DE Recap: 4 stores with sales of $122.2 million. Total retail food sales for DE in the study: $1.53 billion. Albertsons Mid-Atlantic share of DE is 8.0%.								
MD	Anne Arundel (Safeway)	8	$231.50	$2,327.80	9.95%	8	$220.53	9.69%
MD	Baltimore City (Safeway)	3	$89.10	$1,529.60	5.83%	3	$85.41	5.62%
MD	Baltimore County (Safeway)	7	$167.20	$3,450.20	4.85%	6	$138.21	4.22%
MD	Calvert (Safeway)	2	$63.90	$398.40	16.04%	2	$59.82	15.45%
MD	Carroll (Safeway)	3	$98.20	$689.10	14.25%	3	$93.72	14.13%
MD	Cecil (Acme)	1	$23.00	$289.50	7.94%	1	$22.16	7.93%
MD	Charles (Safeway)	3	$98.01	$525.20	18.66%	3	$93.63	18.13%
MD	Frederick (Safeway)	2	$35.40	$967.00	3.66%	2	$33.93	3.74%
MD	Harford (Safeway)	1	$31.40	$1,036.90	3.03%	1	$30.73	3.01%
MD	Howard (Safeway)	3	$75.30	$1,203.10	6.26%	3	$71.80	6.11%
MD	Kent (Acme)	1	$20.10	$102.10	19.69%	1	$19.40	19.46%
MD	Montgomery (Balducci's/S'way)	19	$508.30	$3,765.80	13.50%	19	$482.97	13.27%
MD	Prince George's (Safeway)	9	$268.80	$3,223.10	8.34%	9	$255.32	8.28%
MD	Queen Anne's (Acme/Safeway)	2	$63.90	$158.90	40.21%	2	$61.20	44.74%
MD	Talbot (Acme)	1	$20.30	$227.80	8.91%	1	$19.41	8.94%
MD	Wicomico (Acme)	1	$38.80	$299.70	12.95%	1	$36.30	12.99%
MD	Worcester (Acme)	1	$18.30	$248.70	7.36%	1	$17.45	7.56%
MD Recap: 67 stores with sales of $1.85 billion. Total retail food sales for MD in the study: $21.57 billion. Albertsons Mid-Atlantic share of MD is 8.58%.								
VA	Arlington (Safeway)	4	$74.10	$963.20	7.69%	4	$69.86	7.36%
VA	Culpeper (Safeway)	1	$14.90	$173.40	8.59%	1	$14.21	8.62%
VA	Fairfax (Balducci's/Safeway)	27	$615.70	$5,478.40	11.24%	26	$559.99	10.50%
VA	Fauquier (Safeway)	1	$19.90	$188.40	10.56%	1	$19.06	10.77%
VA	Loudoun (Safeway)	4	$53.90	$1,536.10	3.51%	4	$49.88	3.39%
VA	Prince William (Safeway)	4	$80.60	$1,937.20	4.16%	4	$74.59	4.02%
VA Recap: 41 stores with sales of $859.1 million. Total retail food sales for VA in the study: $25.55 billion. Albertsons Mid-Atlantic share of VA is 3.5%.								

Mid-Atlantic Recap: 124 stores with sales of $3.2 billion annually. Mid-Atlantic retail food sales total: $57.1 billion.
Albertsons Mid-Atlantic Per Store Average: $25.85 million ( ) Indicates another banner used by the company. Source: *Food World,* June 2022

TAKING STOCK

from page 57

onsite eating or through home delivery. Currently, Wonder services about 132,000 households in Northern New Jersey. Lore ultimately wants to expand the concept nationally and, with a market cap now at about $3.5 billion, he's well on his way. Do not bet against this guy...good news for our friend Brian Tuberman, CEO of front end retail solutions firm STCR, which services retailers in the Northeast and Mid-Atlantic markets from its Endwell, NY headquarters. STCR recently received a significant capital infusion from Tampa-based PE firm Mangrove Equity Partners which will allow the company to accelerate its growth plan...interesting New York Times interview with "interim" Starbucks CEO "Humble Howie" Schultz, who returned to the java giant in April. He blamed the recent efforts to unionize Starbucks stores on being a "proxy" of what is happening nationally. "We're right in the middle of it. If a company as progressive as Starbucks, that has done so much and is at the 100th percentile in our entire industry for benefits for our people, can be threatened by a third party that means any company in America can." Ya know, Howie, it's OK to have pride in a company that you pioneered and helped grow globally, but this is 2022. I believe it's time to start listening to your people so you can better understand the seminal changes we're all going through culturally. You might not like it (and neither do I in many aspects), but America in 2022 in no way resembles Brooklyn in 1973. Battling with your associates while also offering us constant reminders of your bombastic ego is no way to be the chief steward of a publicly-held company. Just sayin'...and sadly, its time to put up the RIP flag to a great American institution (no, not Howard Schultz) – Howard Johnson's restaurants. The last remaining orange and blue eatery located in picturesque Lake George, NY actually closed in February, but it wasn't announced until last month. In the 1960s there were about 1,000 HoJos nationally, and for a time it was America's largest restaurant chain. But tastes changed and other fast food and quick serve restaurants emerged to diminish Howard Johnson's presence. The ignominy of the ending was quite sad, too. The 7,500 square foot dining establishment is now for lease. Asking price: $10 (total, not per square foot). Sayonara to the 28 flavors of ice cream; adios to those tough as rubber fried clams!

Local Notes

Giant Food has added two fully electric step vans to its fleet of home delivery trucks which now total nearly 130 vehicles designed to serve its "Giant Delivers" business which is based at its fulfillment center in Hanover, MD. The Landover, MD-based Ahold Delhaize USA retail brand plans to open a second home delivery warehouse later this year in Manassas, VA. "Cleaner transportation is part of Giant's larger sustainability efforts and commitment to supporting the local environment,» Giant's VP-distribution operations Joe Urban said. "We are excited to bring these vehicles into our Giant Delivers fleet and kick off the transition to all-electric delivery...(music plays softly) "The party's over – it's time to turn off (or turn on) the lights." Bad news for Family Dollar (FD) and the thousands of rats that occupied the company's West Memphis, AR distribution center as the discount merchant announced it would close that troubled warehouse by the end of this month. The 850,000 square foot depot, which opened in 1994, has been plagued with rodentia problems for years and was finally temporarily shut down after a Food and Drug Administration (FDA) investigation conducted from September 2021 to late March of this year found more than 2,300 long-tailed critters in the facility. Also temporarily shuttered were more than 400 FD locations in the south that were supplied from the Rathouse. According to a statement from Randy Guiler, VP-investor relations for parent firm Dollar Tree, the decision to close the Rodent Dorm was not related to the FDA inspection (cue the laugh track). Dollar Tree and Family Dollar should be able to adequately supply those 400 stores through one or two of their existing 25 DCs. But what about the rats? Where will they live?...we have a handful of obituaries to report this month including that of long-time Baltimore independent grocer Carl Greeley, owner of three Geresbeck's Markets. Greeley, 92, who began his career working in his father-in-law's corner grocery store in Baltimore, later joined Food Fair and in 1971, bought his first grocery store, a former Eddie's Market in Riviera Beach, MD. By the end of that decade, he opened several limited assortment stores called Box N Save and in 1985 he acquired Geresbeck's Market from Charles and Liz Clark. In 2019, Geresbeck's acquired the former Lauer's store in Pasadena, MD. Carl Greeley personified the successful independent grocer - a

TAKING STOCK continues on page 67


Your retail ex
AFFINITY
GROUP
Check out ou
www.affin


xperts in the Northeast
From Maine to Mid-Atlantic, Affinity Group works with retailers to grow your brand.
r proprietary thought leadership studies on our website:
itysales.com/retail-food-channel/industry-research/
AFFINITY GROUP
SCAN ME

MARYLAND COUNTY SHARE OF MARKET: 2022

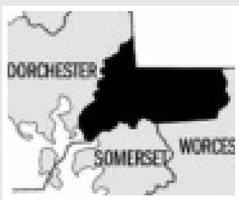
Continued from page 58

15	High's/Baltimore	2	$3.40	1.49%
16	Rite Aid	1	$2.90	1.27%
17	Fas-Marts	1	$1.90	0.83%
		21	**$225.51**	**98.99%**

WASHINGTON COUNTY ($555.1 million)
(Includes Fountainhead, Hagerstown, Hancock)

- Population 154,937
- # of Households 56,367
- Median Income $63,150
- Under age 18.................... 21.70%
- Over age 65...................... 17.50%
- Female 49.10%
- White 77.40%
- Black............................... 12.50%
- Hispanic 5.80%
- Asian................................. 1.90%

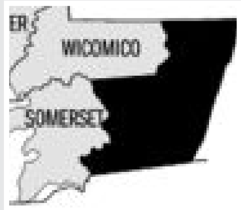
1	The Giant Company (Martin's)	4	$172.48	31.07%
2	Walmart (SuperCenter)	2	$111.80	20.14%
3	Weis Markets	3	$72.89	13.13%
4	Sam's Club	1	$39.50	7.12%
5	Sheetz	8	$28.70	5.17%
6	CVS	7	$21.50	3.87%
7	Walgreens	4	$21.40	3.86%
8	Aldi	2	$15.10	2.72%
9	Target	1	$14.80	2.67%
10	Save-A-Lot	2	$12.90	2.32%
11	Food Lion	1	$11.50	2.07%
12	C&S Independents	5	$8.40	1.51%
13	Lidl	1	$7.70	1.39%
14	7-Eleven	3	$5.60	1.01%
15	High's/Baltimore	2	$4.00	0.72%
16	Royal Farm Stores	1	$4.00	0.72%
		47	**$552.27**	**99.49%**



WICOMICO COUNTY ($299.4 million)
(Includes Fruitland, Salisbury)

- Population 103,980
- # of Households 38,142
- Median Income $60,366
- Under age 18.................... 21.90%
- Over age 65...................... 16.30%
- Female 52.70%
- White 62.00%
- Black............................... 27.30%
- Hispanic 5.50%
- Asian................................. 3.00%

1	Walmart (SuperCenter)	2	$74.50	24.86%
2	Food Lion	4	$38.90	12.98%
3	Albertsons (Acme)	1	$38.80	12.95%
4	Sam's Club	1	$36.80	12.28%
5	Royal Farm Stores	8	$20.40	6.81%
6	Target	1	$15.20	5.07%
7	Rite Aid	4	$15.10	5.04%
8	Walgreens	2	$11.50	3.84%
9	Aldi	1	$11.00	3.67%
10	Wawa	2	$8.90	2.97%
11	CVS	2	$7.70	2.57%
12	7-Eleven	2	$5.80	1.94%
13	Save-A-Lot	1	$4.50	1.50%
14	Fas-Marts	4	$4.10	1.37%
15	Dash-In	1	$2.30	0.77%
		36	**$295.50**	**98.60%**



WORCESTER COUNTY ($248.7 million)
(Includes Ocean City, Pocomoke City, Snow Hill)

- Population 53,132
- # of Households 22,661
- Median Income $65,396
- Under age 18.................... 17.00%
- Over age 65...................... 28.20%
- Female 51.50%
- White 80.00%
- Black............................... 13.00%
- Hispanic 3.70%
- Asian................................. 1.50%

1	Walmart (SuperCenter)	2	$76.70	30.84%
2	Food Lion	4	$61.10	24.57%
3	CVS	3	$18.90	7.60%
4	Albertsons (Acme)	1	$18.30	7.36%
5	7-Eleven	8	$17.10	6.88%
6	Rite Aid	4	$13.20	5.31%
7	Wawa	2	$11.10	4.46%
8	Royal Farm Stores	3	$8.20	3.30%
9	Walgreens	1	$6.60	2.65%
10	C&S Independents	6	$6.00	2.41%
11	**Fas-Marts**	**1**	**$2.20**	**0.88%**

( ) 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 2022

Legislative Line

White House To Host Major Food Conference

The first White House Conference on Food, Nutrition and Health was held in 1969 and influenced the country's food policy agenda for the next 50 years. It was a huge initiative that eventually resulted in policy and regulatory changes at the U.S. Department of Agriculture, the U.S. Department of Health and Human Services, the Food and Drug Administration, and even non-government organizations. Thus, a lot of attention will be forthcoming this fall as the Biden administration recently made a major announcement that they will host a White House Conference on Hunger, Nutrition, and Health this coming September.

The goal of the planned White House conference may sound simple, but for those who plan, particulate, and then regulate the conference outcomes it is far from that. The announced goal of the conference is, and I quote," To end hunger and increase healthy eating and physical activity by 2030, so that fewer Americans experience diet-related diseases like diabetes, obesity, and hypertension." The 2022 White House conference will catalyze the public and private sectors around a coordinated strategy to accelerate progress and drive transformative change in the U.S. to meet these goals. Groups who will work on the project will include anti-hunger and nutrition advocates, food companies, the healthcare community, state and local governments, and others, the White House said.

Members of the food industry and other interested parties are being asked at this time to provide input to the process leading up to the September White House conference. To provide input to the conference agenda, the Biden administration will be hosting listening sessions across the country over the next several months. Preparation for the high-level conference is expected to accelerate progress toward launch of a national plan for achieving the health goals and closing disparity gaps. You can participate and obtain additional information at WhiteHouse.gov/HungerHealthConference.

Legislation Introduced To Improve Food Safety

U.S. Senator Edward Markey (D-MA) has introduced the Ensuring Safe and Toxic-Free Foods Act, which if enacted, will mean stricter regulations of "Generally Recognized as Safe" (GRAS) and create a new FDA office to assess the safety of chemicals in America's food supply. Other co-sponsors of the proposed legislation include Senators Richard Blumenthal (D-CT), and Elizabeth Warren (D-MA). Thus far, the legislation has been endorsed by the Environmental Working Group, the Center for Science in the Public Interest, Environmental Defense Fund, Breast Cancer Prevention Partners, and Earthjustice.

Citing why his proposed legislation is needed, Senator Markey said, "The only mystery families should encounter at mealtime is what is for dinner, not what is in dinner. Americans deserve to know that the food at their kitchen table is safe for themselves and their families to eat."

FTC Versus Fake Marketing Reviews

If you shop online for food or general merchandise, you are bombarded with all types of information to get you to make a purchase. Obviously, some of the messages are true, some false, and some bend the truth a bit. Well, the Federal Trade Commission (FTC) wants to resolve this issue. The FTC is proposing an updated set of rules that would attempt to rein in the burgeoning use of phony reviews to hawk products online and also work to prevent the suppression of negative reviews, according to a report that crossed my desk from Nutra Ingredients USA.

"We're updating the guides to crack down on fake reviews and other forms of misleading marketing, and we're warning marketers on stealth advertising that targets kids," said Samuel Levine, director of the FTC's Bureau of Consumer Protection. The FTC's recent announcement concerns proposed changes to FTC's Endorsement Guides document that incorporates some of the suggestions found in the more than 75 comments it had already received on the proposed new guidelines. The document is now open for another round of public comment before being made final.

"FDA Approved"?

The FDA has issued a document reminding consumers and marketers that in only a few cases is 'FDA approved' a factual statement. 'FDA approved' language and seals appear on hundreds of dietary supplements and functional food products. The logos and statements imply that the products have received an overarching official government imprimatur, when this is never the case, according to a report from Nutra Ingredients USA.

FDA is currently reiterating to marketers that the misuse of FDA's logo in bogus 'FDA approved' statements and or of its seals is a technical violation of the law, and the FDA log should not be used to misrepresent the agency or to suggest that the FDA endorses any private organization, product, or service.

OSHA Previews Upcoming Workplace Safety Rules

Last month the Occupational Safety Health Administration (OSHA) previewed what is on the horizon for workplace safety rules. Speaking to lawmakers, OSHA Administrator Doug Parker noted that OSHA is in the process of developing an infectious disease standard for high-risk workplaces. The rule, which was initially proposed during the Obama administration and will be unveiled later this year, is intended to protect workers from airborne infectious diseases, like COVID-19. Other upcoming standards focus on addressing heat hazards and workplace violence. The agency also reiterated it has no plans to further pursue the broad workplace vaccine mandate that was struck down by the U.S. Supreme Court. Thanks to our public affairs peers at Berman and Company for this bit of information.

Barry F. Scher
Policy Solutions LLC

USDA Promotes Program Access And Combats Discrimination

The U.S. Department of Agriculture's (USDA) Food and Nutrition Service (FNS) has recently announced that it will interpret the prohibition on discrimination based on sex found in Title IX of the Education Amendments of 1972, and in the Food and Nutrition Act of 2008, as amended, Supplemental Nutrition Assistance Program (SNAP), to include discrimination based on sexual orientation and gender identity. Under the Biden administration, USDA and FNS have issued this latest interpretation to help ensure its programs are open, accessible and help promote food and nutrition security, regardless of demographics.

This announcement from USDA further affirms the agency's efforts to dismantle barriers that historically underserved communities have in accessing USDA programs and services including workplace policies in food stores. This latest action protects the civil rights of LGBTQ people while complementing USDA's ongoing efforts to advance equity and access in its nutrition programs. For more information on USDA's equity efforts, visit usda.gov/equity.

Swipe Fees Back In The News

Last month swipe fees were back in the news as a number of high-level food industry executives testified before the U.S. Senate Judiciary Committee on the Hill. The presentations were aptly titled as "Excessive Swipe Fees and Barriers to Competition in the Credit and Debit Card Systems."

FMI said in a statement that its organization and its retail food members want to work with Congress in a bipartisan manner to foster competition in the credit card market so they can better serve their customers and communities, especially in these economically challenging times. Implementing network routing competition would be a good first step in addressing the unchecked card fees and lack of transparency retailers face as the condition of accepting credit cards for customer purchases.

The hidden processing fees negatively impact U.S. consumers – at an average of $700 a year for a family. The $137.8 billion in hidden processing fees artificially drives up the price consumers pay for goods and services. Retailers are forced to incorporate these fees in their pricing decisions and sell items at the "credit card" price to cover costs. The impact disproportionally hurts lower income Americans, those who rely on cash, and those who do not have access to high credit card rewards. Bottom line: FMI and other food trade associations want the federal government to establish parameters that would foster competition and transparency so that card networks would have to compete for their business on fees and terms.

That's all for now. Have a great summer and stay safe and healthy.

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

TAKING STOCK

from page 61

hard working creative merchant who was good to his people and knew many of his customers on a first name basis. May he rest in peace...Robert Vlasic is also dead. Vlasic joined his father's Detroit dairy distribution company after World War II and quickly saw an opportunity to expand the business into pickle processing. He grew the company by signing contracts with cucumber farmers in Michigan and adjoining states. By the late '40s, Vlasic Pickles had become a strong regional brand. In the mid-1950s, the company continued to expand and began servicing supermarkets nationally. In 1978, Vlasic sold his company to Campbell Soup and from 1989 to 1993 served as Campbell's chairman of the board. The company is now owned by ConAgra. Vlasic was 96 when he died... my favorite baseball writer of all time, Roger Angell, passed away last month. Angell, who worked for The New Yorker for 60 years, was more than an ordinary sportswriter. He watched Babe Ruth play in the 1930s and also saw the phenom of the current era, Shohei Ohtani, display his hitting and pitching prowess in 2022. Angell's novel "The Summer Game," (1972) remains the best baseball book I have ever read. His uncanny ability to emotionally penetrate the nuances of the game coupled with his passion and enthusiasm were unlike any other sportswriter. One of his last pieces, "This Old Man: All In Pieces," was written when he was 93 and won the American Society of Magazine Editors' Best Essay award. A man with skill and grace, the talented Mr. Angell was 101 when he passed...Ray Liotta, who in my opinion was a highly underrated actor, also died last month. Liotta's best known roles were as baseball player Shoeless Joe Jackson, the ghostly figure who appears on the baseball field built by Ray Kinsella (Kevin Costner) in the memorable film "Field Of Dreams" (1989), and as Henry Hill in the Martin Scorsese classic "Goodfellas" (1990). His understated portrayal of the young mobster was a perfect offset to his high voltage co-stars Robert DeNiro and Joe Pesce. Liotta, who appeared in 126 film and TV roles in a career that spanned 41 years, was 67 when he suddenly passed away...another underrated talent has also left us. Ronnie Hawkins, the sometimes outlandish rockabilly singer who helped discover the group of musicians that later became The Band, died last month in Canada at the age of 87. A native of Arkansas who started playing music inspired by early Sun Records' artists Elvis Presley, Johnny Cash, Jerry Lee Lewis and Carl Perkins, Hawkins and his revolving group of musicians would play barrooms, carnivals and juke joints in the South before Conway Twitty (yes, that Conway Twitty), another Arkansas native, told him that rock and roll bands could make a lot of money in Canada. Hawkins and his then 18-year old drummer, Levon Helm, drove to Toronto and sought out other local musicians to form a new group. Hawkins' recruiting skills were pretty good – he found Robbie Robertson, Garth Hudson, Richard Manuel and Rick Danko – and Hawkins and the group soon became one of Canada's top nightclub attractions. In the early 1960s those four accompanying Canadian musicians and Helm left to form their own group, and they backed Bob Dylan for several years. Later they broke off on their own as The Band. While in Canada, Hawkins had a few hits of his own including "Forty Days" and "Mary Lou" as well as two covers of Bo Diddley songs – "Who Do You Love ?" and "Hey, Bo Diddley." "The Hawk" could be seen and heard in another classic Martin Scorsese film "The Last Waltz" (1978). He was the first guest musician who performed in the movie playing a version of "Who Do You Love?" that is unforgettable.

From page 16

VP-Omnichannel Fresh Merch.: Dave Lessard
Div. VP-Mid-Atlantic: Rebecca Lupfer
Div. VP-Greater Phil.: Manuel Haro
VP-Team Experience: Jennifer Heinzen Krueger
VP-Brand Experience: Matt Simon
VP-Finance: Julia Morales
Primary Distributor: Direct/C&S Wholesale Grocers
Area Stores: 63 (Includes Martin's)
Area Vol.: $2.88 billion

Giant Eagle
101 Kappa Dr
RIDC Park
Pittsburgh, PA 15238
Phone: (412) 963-6200
Web: gianteagle.com
CEO: Laura Karet
Primary Supplier: Direct
Area Stores: 4 (includes Get Go)
Area Vol.: $40.4 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
VP-Mktg.: Dyani Hanrahan
VP-Finance: Tony Matala
VP-HR: Brian Wanner
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.: Bobbi Majors
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, Robert Withers, Illham Tarbouz, Joe Adams, Scott Belcher, Gil Quarshie Jr., Steve Grassi
Primary Supplier: Direct/C&S Wholesale Grocers
Area Stores: 160
Area Vol.: $6.04 billion

Graul's
12200 Tullamore Rd.
Lutherville, MD 21093
Phone: (410) 308-2100
Web: graulsmarket.com
Officers/Buyers: Harold Graul Jr., Fred Graul, John Evans, Dennis Graul
Primary Supplier: UNFI
Area Stores: 6
Area Vol.: $64.9 million

Great Valu Supermarkets
8258 Richfood Rd.
Mechanicsville, VA 23116
Phone: (804) 746-6000
Web: greatvalu.com
Pimary Supplier: UNFI
Area Stores: 9
Area Vol.: $81.5 million
*This is the advertising and marketing arm that serves a group of independents that operate in the marketing area.

Grocery Outlet
5650 Hollis St.
Emeryville, CA 94608
Phone: (510) 845-1999
Web: groceryoutlet.com
CEO: Eric Lundberg
Pres.: RJ Sheedy
Primary Supplier: Direct
Area Stores: 10
Area Vol.: $63.2 million

Harris Teeter
Div. of Kroger
701 Crestdale Rd.
Matthews, NC 28105
Phone: (704) 845-3100
Web: harristeeter.com
Pres.: Tammy DeBoer
Primary Supplier: Direct
Area Stores: 78
Area Vol.: $2.4 billion

IGA
275 Schoolhouse Rd.
Cheshire, CT 06410
Phone: (203) 272-3511
Primary Supplier: Bozzuto's
Area Stores: 10
Area Vol.: $60.32 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.

See **DIRECTORY** on page 74

IN REVIEW: WEGMANS

State	County	2022 Stores	2022 Sales (in millions)	2022 County Food Sales	% of 2022 County Market	2021 Stores	2021 Sales (in millions)	% of 2021 County Market
MD	Anne Arundel	1	$88.80	$2,327.80	3.81%	1	$88.20	3.88%
MD	Baltimore County	2	$163.20	$3,450.20	4.73%	2	$161.70	4.94%
MD	Frederick	1	$72.30	$967.00	7.48%	1	$70.80	7.80%
MD	Harford	1	$92.40	$1,036.90	8.91%	1	$90.60	8.88%
MD	Howard	1	$102.70	$1,203.10	8.54%	1	$101.60	8.65%
MD	Montgomery	1	$99.90	$3,765.80	2.65%	1	$99.60	2.74%
MD	Prince George's	1	$95.60	$3,223.10	2.97%	1	$94.40	3.06%
MD Recap: 8 stores with sales of $714.9 million. Total retail food sales for MD in the study: $21.57 billion. Wegmans share of MD is 3.31%.								
PA	Cumberland	1	$59.80	$1,206.50	4.96%	1	$59.20	5.20%
PA	Lancaster	1	$65.90	$1,852.90	3.56%	1	$65.20	3.75%
PA Recap: 2 stores with sales of $125.7 million. Total retail food sales for PA in the study: $6.99 billion. Wegmans share of PA is 1.8%.								
VA	Albemarle	1	$71.90	$677.40	10.61%	1	$71.40	11.13%
VA	Chesterfield	1	$63.90	$1,500.20	4.26%	1	$63.20	4.38%
VA	Fairfax	4	$417.20	$5,478.40	7.62%	4	$406.80	7.63%
VA	Henrico	1	$66.10	$1,970.40	3.35%	1	$65.40	3.43%
VA	Loudoun	2	$186.50	$1,536.10	12.14%	2	$182.80	12.42%
VA	Prince William	2	$214.70	$1,937.20	11.08%	2	$209.30	11.27%
VA	Spotsylvania	1	$72.90	$822.80	8.86%	1	$71.20	9.27%
VA	Virginia Beach	1	$69.10	$1,695.20	4.08%	1	$68.40	4.13%
VA Recap: 13 stores with sales of $1.16 billion. Total retail food sales for VA in the study: $25.55 billion. Wegmans share of VA is 4.74%.								

Mid-Atlantic Recap: 23 stores with sales of $2.0 billion annually. Mid-Atlantic retail food sales total: $57.1 billion.
Wegmans Per Store Average: $87 million
Source: *Food World*, June 2022

IN REVIEW: TARGET

State	County	2022 Stores	2022 Sales (in millions)	2022 County Food Sales	% of 2022 County Market	2021 Stores	2021 Sales (in millions)	% of 2021 County Market
DC	Washington	5	$96.50	$2,478.30	3.89%	5	$87.20	3.61%
DC Recap: 5 stores with sales of $96.5 billion. Total retail food sales for DC in the study: $2.48 billion. Target share of DC is 3.89%.								
DE	Kent	1	$18.10	$525.60	3.44%	1	$16.40	3.18%
DE Recap: 1 store with sales of $18.1 million. Total retail food sales for DE in the study: $1.53 billion. Target share of DE is 1.18%.								
MD	Anne Arundel	5	$105.60	$2,327.80	4.54%	5	$95.20	4.18%
MD	Baltimore City	1	$22.30	$1,529.60	1.46%	1	$20.60	1.36%
MD	Baltimore County	6	$106.80	$3,450.20	3.10%	6	$96.50	2.95%
MD	Carroll	1	$14.70	$689.10	2.13%	1	$13.10	1.98%
MD	Charles	2	$28.90	$525.20	5.50%	2	$26.50	5.13%
MD	Frederick	1	$16.10	$967.00	1.66%	1	$14.80	1.63%
MD	Harford	3	$53.80	$1,036.90	5.19%	3	$49.70	4.87%
MD	Howard	2	$44.30	$1,203.10	3.68%	2	$40.90	3.48%
MD	Montgomery	6	$127.60	$3,765.80	3.39%	6	$114.20	3.14%
MD	Prince George's	9	$222.00	$3,223.10	6.89%	9	$199.60	6.47%
MD	Queen Anne's	1	$19.60	$158.90	12.33%	0	$0.00	0.00%
MD	St. Mary's	1	$15.80	$391.30	4.04%	1	$14.40	3.63%
MD	Talbot	1	$17.70	$227.80	7.77%	1	$16.10	7.42%
MD	Washington	1	$14.80	$555.10	2.67%	1	$13.50	2.59%
MD	Wicomico	1	$15.20	$299.70	5.07%	1	$13.90	4.97%
MD Recap: 41 stores with sales of $825.2 million. Total retail food sales for MD in the study: $21.57 billion. Target share of MD is 3.82%.								
PA	Cumberland	2	$35.80	$1,206.50	2.97%	2	$32.30	2.84%
PA	Dauphin	2	$29.40	$1,067.10	2.75%	2	$26.90	2.63%
PA	Franklin	1	$17.80	$455.60	3.91%	1	$16.20	3.52%
PA	Lancaster	3	$59.20	$1,852.90	3.19%	3	$54.10	3.11%
PA	York	3	$59.80	$1,642.70	3.64%	3	$54.80	3.49%
PA Recap: 11 stores with sales of $202 million. Total retail food sales for PA in the study: $6.99 billion. Target share of PA is 2.79%.								
VA	Albemarle	1	$15.60	$677.40	2.30%	1	$14.20	2.21%
VA	Arlington	2	$46.00	$963.20	4.78%	2	$42.30	4.45%
VA	Chesapeake City	3	$31.20	$886.30	3.52%	3	$29.50	3.34%
VA	Chesterfield	5	$66.30	$1,500.20	4.42%	5	$60.70	4.20%
VA	Culpeper	1	$15.30	$173.40	8.82%	1	$14.00	8.50%
VA	Fairfax	11	$250.50	$5,478.40	4.57%	11	$226.30	4.24%
VA	Frederick	2	$27.80	$522.40	5.32%	2	$25.60	5.16%
VA	Hampton/Newport News	2	$28.00	$1,333.70	2.10%	2	$25.90	2.31%
VA	Hanover	1	$17.20	$484.10	3.55%	1	$15.70	3.41%
VA	Henrico	6	$99.70	$1,970.40	5.06%	6	$92.20	4.84%
VA	James City	2	$25.80	$426.30	6.05%	2	$23.10	5.64%
VA	Loudoun	3	$61.70	$1,536.10	4.02%	3	$56.50	3.84%
VA	Norfolk City	1	$14.30	$790.50	1.81%	1	$13.00	1.72%
VA	Prince William (Super Target)	4	$62.80	$1,937.20	3.24%	4	$57.60	3.10%
VA	Spotsylvania (Super Target)	2	$33.60	$822.80	4.08%	2	$30.40	3.96%
VA	Stafford	2	$37.50	$437.90	8.56%	2	$33.90	7.91%
VA	Virginia Beach	4	$61.20	$1,695.20	3.61%	4	$55.70	3.37%
VA	Warren	1	$17.40	$161.40	10.78%	1	$15.60	10.63%
VA Recap: 53 stores with sales of $911.9 million. Total retail food sales for VA in the study: $25.55 billion. Target share of VA is 3.72%.								

Mid-Atlantic Recap: 111 stores with sales of $2.05 billion annually. Mid-Atlantic retail food sales total: $57.1 billion.
Target Per Store Average: $18.5 million ( ) Indicates another banner used by the company.

Source: *Food World,* June 2022

Trade Travels To Atlanta's World Congress Center For First Post-Pandemic IDDBA Dairy-Deli-Bakery Show

The International Dairy-Deli-Bakery 2022 Show was held earlier this month at the Atlanta World Congress Center. Happy to be back to the first post-pandemic IDDBA showcase were (l-r) Ryan Adams, Gary DeLeon and Chris Wilson, all with Albertsons Companies.

Traveling to Atlanta were Rose and Tim Kristie, Redner's Markets.

This trio features Alicia Vaught (l) of Green Valley Marketplace and B. Green's Joanne and Eric Fischer (r).

Handling business at the show for Weis Markets are Rob Dacko (l), Bob Gleeson (c) and Carl Hughes.

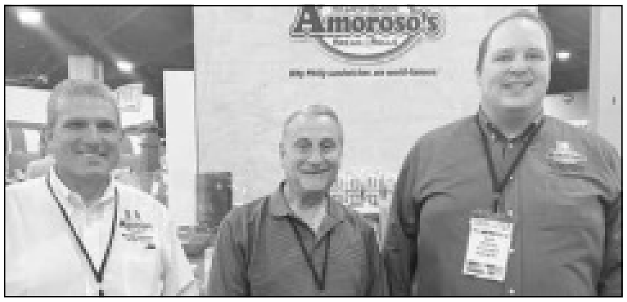
These fine folks are (l-r) Jeff Landsman, Specialty Food Sales Mid-Atlantic; Jonny Yoido and Shantrece Jenkins, Manos Authentic; John Caha, Specialty Food Sales Mid-Atlantic; and Allison Collins, Manos Authentic.

This East Coast Fresh group shot includes (l-r) Erin Still, Keith Barton, Jennifer Ciatola, Kevin Gaither, Laura Ellis and Greg Kraft.

Here we have (l-r) Kirk Deravedisian, Belgioioso; Bill Sando, Hughes Sales; Errico Auricchio, Belgioioso; Heather Keating and Geoff Mason, Hughes Sales; Fred Hoefferle, Belgioioso; and Michael Hughes, Hughes Sales.

On hand from CA Ferolie are (l-r) Ernie Vespole, Travis Hubbard, Kyle Ward and Rusty McDaniel.

Scott Zagers (l) of Superior Foods poses for a photo with Seth Weaver of Ken Weaver Meats.



Carmen Addeo (c) of C&S is flanked in this photo by Dave Deola (l) and Kyle Uniacke of Amoroso's Baking.

These gentlemen from MDI are Chuck Alexander (l) and Allen Reavis.

In the Martin's booth our camera spotted Dennis Wenrick (l), Todd Bixby (c) and Kevin Thibodeau.

This Taylor Farms foursome features (l-r) Maureen Davis, Andrea Hatziyannis, Chris Cunningham and Jennifer Watts.

Jeff Pilarski (c) of Yancey's Fancy is joined here by Ron Benjamin (l) and Dan McShain, both with Affinity Retail Group.

This photo features (l-r) Cheryl Vellante, Lactalis; Joe Navitsky, Stephanie Wrackledge Scott and Scott Holbrook, JOH; Phillipe Surget, Lactalis; Chris Darmody, Allan Perkins, Suzanne Malin and Erica Rancatore, JOH.

From page 68

Karns Quality Food Ltd.
675 Silver Spring Rd.
Mechanicsburg, PA 17050
Phone: (717) 766-6477
Web: karnsfoods.com
CEO/Pres.: D. Scott Karns
Primary Supplier: UNFI
Area Stores: 10
Area Vol.: $184.0 million

Kroger
Mid-Atlantic Div.
140 Eastshore Dr., Ste. 300
Glen Allen, VA 23059
Phone: (513) 762-4000
Web: kroger.com
CEO: Rodney McMullen
Pres.-Mid-Atlantic Div.: Lori Raya
Primary Supplier: Direct
Area Stores: 38 (Includes Marketplace)
Area Vol.: $1.3 billion

Lidl U.S.
3500 S. Clark St.
Arlington, VA 22202
Phone: (571) 398-5435
Web: lidl.com
Pres./CEO Lidl US: Michal Lagunionek
VP-U.S. Operations: Pavel Petkov
Primary Supplier: Direct
Area Stores: 57
Area Vol.: $455.4 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: UNFI
Area Stores: 4
Area Vol.: $60.3 million

MOM's Organic Market
5566 Randolph Rd
Rockville, MD 20852
Phone: (301) 816-4944
Web: momsorganicmarket.com
CEO: Scott Nash
Primary Supplier: UNFI
Area Stores: 16
Area Vol.: $241.6 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
Web: publix.com
Primary Supplier: Direct
Area Stores: 19
Area Vol: $290.5 million

Redner's Markets Inc.
3 Quarry Rd.
Reading, PA 19605
Phone: (610) 926-3700
Web: rednersmarkets.com
Chairman: Richard Redner
Pres: Ryan Redner
COO: Gary M. Redner
VP-Procurement: Dan Eberhart
VP/General Counsel: Jason Hopp
VP-Finance: Richard Rabenold
VP-Groc. Ops.: William Wallace
VP-Perishables: Gary O'Brien
VP-HR: Robert McDonough
VP-IT: Nicholas Hidalgo
Primary Supplier: UNFI
Area Stores: 13
Area Vol.: $282.6 million

Roots Market
5808 Clarksville Square Rd.
Clarksville, MD 21029
Phone: (443) 535-9321
Web: rootsmkt.com
Owner: Jeff Kaufman
Area Stores: 2
Area Vol.: $22.6 million

Save A Lot
400 Northwest Plaza Dr.
St. Ann, MO 63074
Phone: (314) 592-9100
Web: save-a-lot.com
CEO: Leon Bergmann
Supplier: Direct
Area Stores: 35
Area Vol.: $215.3 million

Sharp Shopper
1110 Sharp Ave.
Ephrata, PA 17522
Phone: (717) 733-9555
Web: sharpshopper.net
Owners: Dennis & Bonnie Sharp
Primary Supplier: Direct
Area Stores: 4
Area Vol.: $51.2 million

Shoppers Food & Pharmacy
Div. of UNFI
16901 Melford Blvd., Ste. 300
Bowie, MD 20715
Phone: (301) 306-8600
Web: shoppersfood.com
CEO: Alexander "Sandy" Miller Douglas
Primary Supplier: UNFI
Area Stores: 20
Area Vol.: $566.5 million

See **DIRECTORY** on page 77

Trade Returns To In-Person Summer Fancy Food Show June 12-14 At Javits Center In New York City

The first in-person Summer Fancy Food Show since the onset of COVID-19 was held June 12-14 at the Jacob Javits Center in New York City. Mathew Thalakotur (c) of Mighty Gum is joined here by Adam O'Sullivan (l) and Lauren Erstling of Amazon Fresh.

Handling things at the show for Affinity Retail are Ron Benjamin (l) and Dan McShain.

These fine folks are (l-r) Chris Swinnerton, Nancy Wingfield and Abby Blauch of The Giant Company and Allan Perkins and Scott Holbrook of JOH.

This Giant Food group shot includes (l-r) Diane Couchman, Michael Bravi, Scott McDowell, Brooke Loschiavo and Cipriano Andrade.

Representing Giant Eagle at the show are (l-r) Janelle Cohn, Amy Allison, Paul Abbott, Lanae Cicciarelli, Libby Manning and Charles Potter.

This Grocery Outlet duo comprises Vivian Son (l) and Michele Rosenfeld.

All smiles for our camera are (l-r) Brian Kohlman, Bert Sartori and Cindy Ravanis of Sartori Cheese, Christine Collins of UNFI and Ben Kautz of Giant Food.

Sam's Club is well represented at the show by Sydney Tucker (l) and Katie Newman.

Here we have (l-r) Carla Zidarevich and Jennifer Rose-Rizzo, Target; Nancy Telencio and Danielle McDonald, Agilex; Robin Jeffers, Target; and Ophelia Meldener, Agilex.

Peter Machala (r) of Wakefern is joined here by Aron Levi (l) and Michael D'Amato, both with Natalie's.

This Walmart trio includes Catherine Hall (l), Kelly McKinnon (c) and Katie Miles.

Industry veteran Brian Haley (l) says hello to (2nd from l) Sylvia Mala and Fred Hoefferle of BelGioioso and UNFI's Christine Collins.

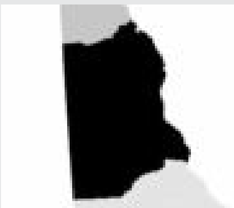
These smiles belong to Daniela Belen (l), John Coles (c) and Olivia Peloquin, all with Euro-American.

This Cento Fine Foods group features (l-r) Justin Giorla, Maurice Christino, Joe Cristella IV, Rick Ciccotelli, Bart Ricci, Silvio Conte and Geoff Dobren.

Representing the Virginia Department of Agriculture at the show are Marshall Payne (l), Heather Wheeler (c) and Rob Davenport.

DELAWARE COUNTY SHARE OF MARKET: 2022

Total sales for those Delaware counties included in the study are $1.53 billion



KENT COUNTY ($525.6 million)
(Includes Dover, Harrington, Smyrna)

- Population 189,149
- # of Households................. 67,299
- Median Income $60,117
- Under age 18.................... 22.80%
- Over age 65...................... 17.50%
- Female 51.80%
- White 60.40%
- Black................................ 27.30%
- Hispanic 7.40%
- Asian.................................. 2.40%

Rank	Company	Stores	Sales (in millions)	% of Market
1	Redner's Markets	3	$72.40	13.77%
2	Walmart (SuperCenter)	2	$63.50	12.08%
3	Albertsons (Acme/Safeway)	2	$56.50	10.75%
4	Wawa	7	$52.60	10.01%
5	Sam's Club	1	$47.20	8.98%
6	Walgreens	8	$36.90	7.02%
7	Food Lion	4	$30.90	5.88%
8	Fas-Marts	15	$25.80	4.91%
9	Rite Aid	6	$25.10	4.78%
10	Aldi	3	$24.40	4.64%
11	Target	1	$18.10	3.44%
12	CVS	3	$16.90	3.22%
13	Royal Farm Stores	8	$15.90	3.03%
14	Military Commissaries	1	$11.62	2.21%
15	International Markets	1	$10.30	1.96%
16	Lidl	1	$7.10	1.35%
17	C&S Independents	2	$2.80	0.53%
18	7-Eleven	1	$2.70	0.51%
		69	**$520.72**	**99.07%**

SUSSEX COUNTY ($1.0 billion)
(Includes Bethany Beach, Millville, Seaford)

- Population 247,527
- # of Households................. 94,223
- Median Income $64,905
- Under age 18.................... 18.30%
- Over age 65...................... 28.70%
- Female 51.60%
- White 75.40%
- Black................................ 12.20%
- Hispanic 9.30%
- Asian.................................. 1.40%

Rank	Company	Stores	Sales (in millions)	% of Market
1	Giant Food	3	$174.93	17.46%
2	Food Lion	9	$140.10	13.98%
3	Walmart (SuperCenter)	4	$135.90	13.56%
4	Wawa	9	$78.30	7.81%
5	Walgreens	14	$77.60	7.74%
6	Albertsons (Acme/Safeway)	2	$65.70	6.56%
7	Weis Markets	4	$60.24	6.01%
8	Redner's Markets	2	$50.80	5.07%
9	Royal Farm Stores	20	$45.10	4.50%
10	BJ's Wholesale Club	1	$40.60	4.05%
11	Harris Teeter	2	$40.20	4.01%
12	C&S Independents	3	$38.70	3.86%
13	CVS	6	$32.80	3.27%
14	Rite Aid	10	$30.70	3.06%
15	Fresh Market	1	$13.10	1.31%
16	Fas-Marts	8	$11.40	1.14%
17	Save-A-Lot	2	$10.10	1.01%
18	International Markets	1	$9.20	0.92%
19	Aldi	1	$9.10	0.91%
		102	**$1,064.57**	**106.23%***

( ) 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 2022

DIRECTORY OF RETAILERS

From page 74

ShopRite
5000 Riverside Dr.
Keasby, NJ 08832
Phone: (908) 527-3300
Web: shoprite.com
Chmn/CEO: Joseph Colalillo
Pres./COO: Joseph Sheridan
Area Stores: 293 (Includes Price Rite)
Area Vol.: $445.4 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
CFO: Lawrence "Chip" Malloy
Pres./COO: Nick Konat
Chief Store Operations Officer:
Dan Sanders
Chief Fresh Merch. Officer: Scott Neal
SVP/CMO: Gil Phillips
SVP-Chief Forager.: Kim Coffin
SVP-Supply Chain: Joe Hurley
SVP-East: Dan Croce
Primary Supplier: Direct/Kehe
Area Stores: 6
Area Vol.: $109.7 million

Streets Market & Café
2400 14th St. NW
Washington, DC 20009
Phone: (202) 265-3300
Web: streetsmarket.com
VP: Campbell Burns
Primary Supplier: UNFI
Area Stores: 12
Area Vol.: $100.1 million

Trader Joe's
East Coast Div.
160 Federal St., 12th Fl.
Boston, MA 02110
Phone: (857) 400-3400
Web: traderjoes.com
CEO: Dan Bane
Supplier: Direct
Area Stores: 30
Area Vol.: $748.8 million

Wegmans Food Markets, Inc.
1500 Brooks Ave.
P.O. Box 30844
Rochester, NY 14603-0844
Phone: (585) 328-2550
Web: wegmans.com
Chmn: Danny Wegman
Pres./CEO.: Colleen Wegman
Primary Supplier: Direct
Area Stores: 23
Area Vol.: $2.0 billion

Weis Markets, Inc. nis
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
Area Stores: 97
Area Vol.: $1.93 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 700I.
Jersey City, NJ 07311
Phone: (201) 567-2090
Div. Pres.: Nicole Wescoe
Area Stores: 37 (includes Amazon Fresh)
Area Vol: $1.37 billion

DRUG STORES

CVS Caremark
One CVS Dr.
Woonsocket, RI 02895
Phone: (401) 765-1500
Web: cvs.com
CEO/Pres.: Karen Lynch
Co-Pres.-CVS Pharmacy: Michelle Peluso, Prem Shah
Area Stores: 638
Area Vol.: $6.63 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
Pres../CEO: Heyward Donigan
SVP-Marketing/Merch.: Erik Keptner
Area Stores: 182

See **DIRECTORY** on page 78

DIRECTORY OF RETAILERS

From page 77

Area Vol.: $646.6 million

Walgreens
200 Wilmot Rd.
Deerfield, IL 60015
Phone: (847) 940-2500
Web: walgreens.com
CEO: Rosalind Brewer
Area Stores: 323
Area Vol.: $1.84 billion

CONVENIENCE STORES

7-Eleven
3200 Hackberry Rd.
Irving, TX 75063
Phone: (972) 828-7011
Web: 7-eleven.com
Pres./CEO: Joseph DePinto
Primary Supplier: McLane
Area Stores: 1,088
Area Vol.: $2.2 billion

Circle K Convenience Stores, Inc.
Div. of Couche-Tard
935 E. Tallamadge Ave.
Akron, OH 44310
Phone: (330) 630-6300
1100 Situs Court, Ste 100
Raleigh, NC 27606
Phone: (919) 774-6700
Web: circlek.com
Pres./CEO Brian P. Hannasch
Area Stores: 30
Area Vol.: $62.5 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
Area Stores: 45
Area Vol.: $89.0 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
Area Stores: 98
Area Vol.: $169.2 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
Area Stores: 54
Area Vol.: $95.1 million

Miller Marts
Div. of Global Partners llc
800 South St., Ste. 500
Waltham, MA 02453
Phone: (781) 894-8800
Web: gotomillers.com
Primary Supplier: Davenport
Area Stores: 19
Area Vol.: $39.0 million

Royal Farms
3611 Roland Ave.
Baltimore, MD 21211
Phone: (410) 889-0200
Web: royalfarms.com
Pres.: John Kemp
Primary Supplier: Cooper Booth
Area Stores: 233
Area Vol.: $619.9 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
Area Stores: 70
Area Vol.: $139.3 million

Sheetz, Inc.
243 Sheetz Way
Claysburg, PA 16625
Phone: (800) 765-4686
Web: sheetz.com
Exec. Vice Chmn.: Joe Sheetz
CEO/Pres.: Travis Sheetz
Primary Supplier: Direct
Area Stores: 153
Area Vol.: $599.8 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
Area Stores: 117
Area Vol.: $177.2 million

Wawa, Inc.
Red Roof, 260 W. Baltimore Pike
Wawa, PA 19063

See **DIRECTORY** on page 119

June 25-26

The 30th annual National Capital BBQ Battle sponsored by Giant Food will be held on Pennsylvania Avenue in the District of Columbia. For more information, go to https://bbqindc.com/.

July 11-12

Weis Markets will hold its annual golf outing at several area courses near the company's Sunbury, PA headquarters. More details to come at a later date.

July 18

Ahold Delhaize USA will hold its annual Our Family golf outing at 12 Central Pennsylvania golf courses. Registration begins at 7:30 a.m. followed by a 9:00 a.m. shotgun start.

July 25-26

The C&S Robesonia holiday selling show will be held at Lancaster Convention Center in Lancaster, PA.

August 2

Bozzuto's will host its Merchandising Marketplace 2022 at Foxwoods Resort Casino. For more information, contact Don Anthony at 203.250.5651 or danthony@bozzutos.com. You can also find more information, or register to attend at foodshowbozzutos.info.

August 4

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

August 8

CIFI's annual charity golf outing will be held at Engineers Country Club in Roslyn Harbor, NY. For more information, contact Jim Gorman at 201.949.2232 or jgorman@caferolie.com.

August 16-18

FMI Fresh Forward will be held at Embassy Suites By Hilton at the Downtown Denver Convention Center. For more information, go to www.fmi.org.

August 30

Family Owned Markets will hold its golf outing at Fox Chase Golf Club in Stevens, PA.

August 31- September 1

Terrappin's Home Delivery World 2022 will be held at the Pennsylvania Convention Center in Philadelphia, PA. For more information go to www.terrapinn.com.

September 28-October 1

Expo East will be held in Philadelphia, PA. For more information, go to www.expoeast.com.

October 15-18

The NFRA annual convention will be held at the Orlando World Center Marriott. Registration opens in March. For more information, call 717.657.8601 or go to www.NFRAConvention.org.

October 25

Kenny's ShopRites will hold its golf outing. More details to follow at a later date.

October 27-29

PMA Fresh Summit 2022 will be held at the Orange County Convention Center in Orlando, FL. For more information, go to www.pma.com/events.

November 4-6

MAFTO will honor the retailers of the Advantage Retail Group - McCaffrey's, Murphy's Markets, Graul's and Henning's - at its annual Gala at the Resorts Hotel Casino in Atlantic City. For more information, or to register, go to www.mafto.org/gala.

November 5

Children's Cancer Foundation's 38th annual gala will be held at Martin's Crosswinds in Greenbelt, MD. For more information, go to www.childrenscancerfoundation.org.

2023

January 15-17

The Winter Fancy Food Show will be held at the Las Vegas Convention Center.

January 20-23

FMI Midwinter 2023 will be held at the Hyatt Regency in Orlando. For more information, go to www.fmi.org/midwinter-conference.

October 7-10

The NFRA convention will be held in San Diego.

2024

October 5-8

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

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.

IN REVIEW: FOOD LION

State	County	2022 Stores	2022 Sales (in millions)	2022 County Food Sales	% of 2022 County Market	2021 Stores	2021 Sales (in millions)	% of 2021 County Market
DE	Kent	4	$30.90	$525.60	5.88%	4	$30.70	5.95%
DE	Sussex	9	$140.10	$1,002.10	13.98%	9	$138.70	14.35%
DE Recap: 13 stores with sales of $171.0 million. Total retail food sales for DE in the study: $1.53 billion. Food Lion share of DE is 11.19%.								
MD	Anne Arundel	5	$68.90	$2,327.80	2.96%	5	$68.30	3.00%
MD	Baltimore County	6	$61.10	$3,450.20	1.77%	6	$60.60	1.85%
MD	Caroline	2	$21.10	$85.80	24.59%	2	$20.80	25.30%
MD	Carroll	3	$43.80	$689.10	6.36%	3	$43.50	6.56%
MD	Cecil	3	$34.30	$289.50	11.85%	3	$33.90	12.14%
MD	Charles	3	$38.90	$525.20	7.41%	3	$38.30	7.42%
MD	Dorchester	1	$12.80	$59.50	21.51%	1	$12.60	22.22%
MD	Frederick	5	$73.10	$967.00	7.56%	5	$72.20	7.96%
MD	Harford	2	$10.60	$1,036.90	1.02%	2	$10.40	1.02%
MD	Howard	2	$22.30	$1,203.10	1.85%	2	$22.30	1.90%
MD	Kent	1	$15.80	$102.10	15.48%	1	$15.60	15.65%
MD	Montgomery	1	$11.50	$3,765.80	0.31%	1	$11.40	0.31%
MD	Prince George’s	3	$40.80	$3,223.10	1.27%	3	$40.40	1.31%
MD	Queen Anne’s	2	$24.30	$158.90	15.29%	2	$24.00	17.54%
MD	Somerset	2	$26.40	$40.20	65.67%	2	$25.90	65.90%
MD	St. Mary’s	2	$30.00	$391.30	7.67%	2	$29.50	7.44%
MD	Washington	1	$11.50	$555.10	2.07%	1	$11.30	2.17%
MD	Wicomico	4	$38.90	$299.70	12.98%	4	$38.10	13.64%
MD	Worcester	4	$61.10	$248.70	24.57%	4	$60.50	26.22%
MD Recap: 52 stores with sales of $647.2 million. Total retail food sales for MD in the study: $21.57 billion. Food Lion share of MD is 3.0%.								
PA	Franklin	1	$11.00	$455.60	2.41%	1	$10.90	2.37%
PA	York	1	$4.90	$1,642.70	0.30%	1	$4.80	0.31%
PA Recap: 2 stores with sales of $15.9 million. Total retail food sales for PA in the study: $6.99 billion. Food Lion share of PA is 0.23%.								
VA	Accomack	2	$33.20	$100.80	32.94%	2	$32.70	33.75%
VA	Albemarle	6	$66.80	$677.40	9.86%	6	$65.60	10.22%
VA	Caroline	2	$16.70	$33.60	49.70%	2	$16.50	50.93%
VA	Chesapeake City	12	$147.50	$886.30	16.64%	12	$146.20	16.56%
VA	Chesterfield	17	$212.80	$1,500.20	14.18%	17	$209.20	14.49%
VA	Dinwiddie	4	$38.80	$134.90	28.76%	4	$38.10	29.06%
VA	Essex	1	$11.70	$66.70	17.54%	1	$11.20	18.12%
VA	Fairfax	2	$31.00	$5,478.40	0.57%	2	$30.70	0.58%
VA	Fauquier	3	$23.60	$188.40	12.53%	3	$23.10	13.06%
VA	Gloucester	2	$23.10	$128.90	17.92%	2	$22.80	18.63%
VA	Goochland	2	$22.10	$34.80	63.51%	2	$21.60	63.39%
VA	Greene	1	$9.70	$17.60	55.11%	1	$9.40	40.87%
VA	Hampton/Newport News	16	$284.80	$1,333.70	21.35%	16	$280.20	24.98%
VA	Hanover	6	$73.90	$484.10	15.27%	6	$72.70	15.77%
VA	Henrico	14	$194.70	$1,970.40	9.88%	14	$190.80	10.01%
VA	Isle of Wight	3	$35.80	$91.50	39.13%	3	$35.30	39.53%
VA	James City	5	$60.20	$426.30	14.12%	5	$59.80	14.60%
VA	King George	2	$26.60	$96.60	27.54%	2	$26.10	28.74%
VA	King William	2	$30.90	$38.80	79.64%	2	$30.30	81.02%
VA	Lancaster	1	$14.80	$84.30	17.56%	1	$14.10	17.74%
VA	Loudoun	3	$39.50	$1,536.10	2.57%	3	$38.40	2.61%
VA	Louisa	2	$22.50	$49.70	45.27%	2	$21.80	45.32%
VA	Madison	1	$14.20	$14.50	97.93%	1	$13.70	98.56%
VA	Mathews	1	$14.30	$14.60	97.95%	1	$14.10	97.92%
VA	Middlesex	1	$14.40	$30.70	46.91%	1	$14.00	43.21%
VA	New Kent	4	$38.90	$51.90	74.95%	3	$34.90	67.37%
VA	Norfolk City	8	$134.90	$790.50	17.07%	8	$132.40	17.54%

IN REVIEW: FOOD LION

State	County	2022 Stores	2022 Sales (in millions)	2022 County Food Sales	% of 2022 County Market	2021 Stores	2021 Sales (in millions)	% of 2021 County Market
VA	Northampton	2	$22.40	$40.60	55.17%	2	$21.80	59.24%
VA	Northumberland	1	$14.20	$21.40	66.36%	1	$13.90	67.80%
VA	Orange	3	$30.40	$126.60	24.01%	3	$29.80	24.71%
VA	Page	2	$11.80	$73.40	16.08%	2	$11.40	16.45%
VA	Portsmouth City	5	$73.90	$276.70	26.71%	5	$72.70	26.58%
VA	Powhatan	2	$24.20	$76.90	31.47%	2	$23.60	32.02%
VA	Prince George	2	$22.30	$80.20	27.81%	2	$21.90	25.80%
VA	Prince William	9	$133.50	$1,937.20	6.89%	9	$131.60	7.09%
VA	Richmond	1	$13.90	$22.30	62.33%	1	$13.60	62.10%
VA	Shenandoah	3	$43.20	$122.40	35.29%	3	$42.50	35.68%
VA	Southampton	2	$30.60	$93.20	32.83%	2	$29.70	33.00%
VA	Spotsylvania	1	$12.40	$822.80	1.51%	1	$12.10	1.58%
VA	Suffolk City	5	$51.20	$308.90	16.57%	5	$50.80	16.72%
VA	Virginia Beach	21	$257.70	$1,695.20	15.20%	21	$252.60	15.27%
VA	Westmoreland	2	$28.40	$51.70	54.93%	2	$27.40	54.91%
VA	York	4	$48.80	$182.80	26.70%	4	$48.80	27.14%

VA Recap: 188 stores with sales of $2.46 billion. Total retail food sales for VA in the study: $25.55 billion. Food Lion share of VA is 10.01%.

Mid-Atlantic Recap: 255 stores with sales of $24.55 billion annually. Mid-Atlantic retail food sales total: $57.1 billion.
Food Lion Per Store Average: $12.9 million

Source: *Food World*, June 2022

Eastern Shore Supermarket Leaders

- Food Lion Still Kickin' Butt
- Albertsons Gains Mkt. Share
- Giant Doing $1M Weekly
- Aldi Adds Another Unit
- Redner's Set To Open In Lewes

Rank	Company	2022 Stores	2022 Sales (in millions)	% of 2022 Market	2021 Stores	2021 Sales (in millions)	% of 2021 Market
1	Food Lion	33	$427.00	30.63%	33	$421.40	30.61%
2	Albertsons (Acme/Safeway)	10	$283.60	20.25%	10	$270.26	19.83%
3	Giant Food	4	$211.29	15.16%	4	$209.62	15.19%
4	Redner's Markets	6	$148.50	10.65%	6	$147.50	10.72%
5	Weis Markets	5	$71.09	5.10%	5	$70.79	5.12%
6	Harris Teeter	3	$66.60	4.78%	3	$65.80	4.79%
7	C&S Independents	14	$55.30	3.97%	14	$54.84	4.02%
8	Aldi	6	$52.90	3.80%	5	$42.30	3.10%
9	International Markets	2	$19.50	1.40%	2	$19.20	1.41%
10	Save-A-Lot	4	$19.10	1.37%	4	$20.70	1.52%
		87	**$1,354.88**	**97.20%**	**86**	**$1,322.41**	**97.04%**

This chart lists the top 10 supermarket retailers in the Eastern Shore market. Counties/cities included are: Kent and Sussex in DE; Caroline, Dorchester, Kent, Queen Anne's, Somerset, Talbot, Wicomico and Worcester in MD; and Accomack and Northampton in VA. Petroleum sales are not included. ( ) Indicates another banner used by the company.
Total supermarket sales for the area are $1.39 billion. Source: *Food World,* June 2022

Eastern Shore Market Leaders

- Alts. Share Grows To 52.3%
- Walmart Still Sales King
- Drug Chains Control 13.3%
- Royal Farms Adds 2 Units
- Target Aided By Strong Comps

Rank	Company	2022 Stores	2022 Sales (in millions)	% of 2022 Market	2021 Stores	2021 Sales (in millions)	% of 2021 Market
1	Walmart (SuperCenter)	14	$473.40	16.37%	14	$446.70	16.20%
2	Food Lion	33	$427.00	14.77%	33	$421.40	14.76%
3	Albertsons (Acme/Safeway)	10	$283.60	9.81%	10	$270.26	9.80%
4	Giant Food	4	$211.29	7.31%	4	$209.62	7.34%
5	Walgreens	34	$193.30	6.68%	34	$183.60	6.66%
6	Wawa	23	$167.30	5.79%	22	$147.41	5.35%
7	Redner's Markets	6	$148.50	5.14%	6	$147.50	5.35%
8	Royal Farm Stores	58	$142.90	4.94%	56	$131.50	4.77%
9	Rite Aid	28	$98.00	3.39%	29	$100.00	3.63%
10	CVS	18	$94.50	3.27%	18	$90.70	3.29%
11	Sam's Club	2	$84.00	2.90%	2	$81.60	2.96%
12	BJ's Wholesale Club	2	$76.10	2.63%	2	$75.40	2.73%
13	Weis Markets	5	$71.09	2.46%	5	$70.79	2.57%
14	Target	4	$70.60	2.44%	3	$46.40	1.68%
15	Fas-Marts	40	$68.70	2.38%	40	$63.20	2.29%
16	Harris Teeter	3	$66.60	2.30%	3	$65.80	2.39%
17	C&S Independents	14	$55.30	1.91%	14	$54.84	1.99%
18	Aldi	6	$52.90	1.83%	5	$42.30	1.53%
19	7-Eleven	18	$42.80	1.48%	16	$33.70	1.22%
20	International Markets	2	$19.50	0.67%	2	$19.20	0.70%
		324	**$2,847.38**	**98.46%**	**318**	**$2,701.92**	**97.98%**

This chart lists the top 20 retailers in the Eastern Shore market which sell groceries, HBC, drugs, general merchandise and tobacco products. Volumes listed include 100% of store sales for supermarkets, c-stores and drug chains. Sales for club stores, Target and Walmart are extrapolated to include comparable categories, as explained in the formula on page 85. 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: $2.89 billion. Source: *Food World*, June 2022

IN REVIEW: THE GIANT COMPANY

State	County	2022 Stores	2022 Sales (in millions)	2022 County Food Sales	% of 2022 County Market	2021 Stores	2021 Sales (in millions)	% of 2021 County Market
MD	Carroll (Martin's)	1	$73.78	$689.10	10.71%	1	$72.79	10.98%
MD	Cecil (Martin's)	1	$58.22	$289.50	20.11%	1	$56.22	20.13%
MD	Washington (Martin's)	4	$172.48	$555.10	31.07%	4	$165.94	31.87%
MD Recap: 6 stores with sales of $304.48 million. Total retail food sales for MD in the study: $21.57 billion. The Giant Company share of MD is 1.41%.								
PA	Adams	1	$62.03	$215.10	28.84%	1	$59.44	29.66%
PA	Cumberland	10	$472.87	$1,206.50	39.19%	10	$448.61	39.41%
PA	Dauphin	9	$454.73	$1,067.10	42.61%	9	$438.40	42.89%
PA	Franklin (Martin's)	4	$156.58	$455.60	34.37%	4	$148.67	32.33%
PA	Lancaster	14	$494.13	$1,852.90	26.67%	14	$469.10	26.96%
PA	Lebanon	3	$93.96	$438.80	21.41%	3	$91.00	22.22%
PA	Perry	1	$30.77	$115.10	26.73%	1	$29.27	26.18%
PA	York	10	$545.24	$1,642.70	33.19%	10	$522.09	33.27%
PA Recap: 52 stores with sales of $2.31 billion. Total retail food sales for PA in the study: $6.99 billion. The Giant Company share of PA is 33.03%.								
VA	Culpeper (Martin's)	1	$45.94	$173.40	26.49%	1	$43.23	26.23%
VA	Frederick (Martin's)	3	$161.83	$522.40	30.98%	3	$154.34	31.10%
VA	Warren (Martin's)	1	$61.57	$161.40	38.15%	1	$55.79	38.00%
VA Recap: 5 stores with sales of $269.34 million. Total retail food sales for VA in the study: $25.55 billion. The Giant Company share of VA is 1.1%.								

Mid-Atlantic Recap: 63 stores with sales of $2.88 billion annually. Mid-Atlantic retail food sales total: $57.1 billion.
The Giant Company Per Store Average: $45.78 million ( ) Indicates another banner used by the company. Source: *Food World,* June 2022

FOOD WORLD MARKET STUDY: RULES & ANALYSIS

from page 12

Costco and mass merchant Target. While the heavy skirmishes of the past decade are seemingly finished, the Richmond area remains a market where there is no room for the meek.

Tidewater

Hampton Roads' two leading retailers – Food Lion and Walmart – continued their dominance in another extremely overstored and competitive market. Food Lion, with 81 stores in the $6.1 billion region, remained atop the leaderboard with a very healthy 18.3 percent share, and Walmart, based on strong comp store revenue, now controls 16.1 percent of the Tidewater market. While there was little new store activity over the past 12 months partly because the overall market is so retail-diverse and overstored, that might change in the next 18 months as Publix has reportedly signed leases to build new stores in Norfolk and Suffolk. Those two store openings would likely have an impact on Food Lion and the two Kroger banners – Kroger and Harris Teeter – which all operate stores in those markets. Once again, the biggest loser over the past year were the five military commissaries in Hampton Roads. Annual sales fell by more than $40 million to $120.8 million and share plummeted from 2.8 percent to 2 percent.

How We Do It?

This is the 44th 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, 2021 through March 31, 2022.

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, Price Rite), military commissaries, Walmart and Target (Kmart no longer operates stores in our region and the "blue light" specialist has only three remaining open nationally).

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).

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

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

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

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

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.

The market study is copyrighted by Best-Met Publishing Co., Inc., and any representation or other use of this study without the expressed permission of the publisher is prohibited.

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

Our team consists of Terri Maloney, VP-editorial director; Maria Maggio, VP-general manager of Food Trade News; Kevin Gallagher, VP-Metro New York and New England; Karen Fernandez, director of marketing/digital strategist; and Beth Pripstein, office and circulation 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 83 in late May. I've known and worked with Dick since 1973.

Special recognition to Terri Maloney. In her 22 years as editor (she has been with Best-Met for 33 years), Terri has piloted every aspect of the grueling Market Study process which includes data collection (involving hundreds of changes each year), IT through-put, pre-press coordination, proofreading and printer communication.

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

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

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

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

This is my 49th year of reporting about the grocery industry. The last two years have been remarkable – challenging, frightening, and in a strange way, redeeming.

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

I'm old, but I'm not done yet! Let's keep it rolling!

Jeff Metzger

Jeff Metzger

IN REVIEW: WHOLE FOODS

State	County	2022 Stores	2022 Sales (in millions)	2022 County Food Sales	% of 2022 County Market	2021 Stores	2021 Sales (in millions)	% of 2021 County Market
DC	Washington (Amazon Fresh)	8	$305.80	$2,478.30	12.34%	6	$256.50	10.62%
DC Recap: 8 stores with sales of $305.8 million. Total retail food sales for DC in the study: $2.45 billion. Whole Foods share of DC is 12.34%.								
MD	Anne Arundel	1	$52.60	$2,327.80	2.26%	1	$52.40	2.30%
MD	Baltimore City	2	$67.80	$1,529.60	4.43%	2	$67.40	4.43%
MD	Baltimore County	1	$31.70	$3,450.20	0.92%	0	$0.00	0.00%
MD	Howard	1	$37.00	$1,203.10	3.08%	1	$36.80	3.13%
MD	Montgomery (Amazon Fresh)	6	$242.30	$3,765.80	6.43%	5	$224.90	6.18%
MD	Prince George's	1	$33.10	$3,223.10	1.03%	1	$32.70	1.06%
MD Recap: 12 stores with sales of $464.5 million. Total retail food sales for MD in the study: $21.57 billion. Whole Foods share of MD is 2.15%.								
PA	Lancaster	1	$37.30	$1,852.90	2.01%	1	$37.00	2.13%
PA Recap: 1 store with sales of $37.3 million. Total retail food sales for PA in the study: $6.99 billion. Whole Foods share of PA is 0.53%.								
VA	Albemarle	1	$35.90	$677.40	5.30%	1	$35.60	5.55%
VA	Arlington	2	$79.80	$963.20	8.28%	2	$79.20	8.34%
VA	Fairfax (Amazon Fresh)	8	$297.20	$5,478.40	5.42%	7	$276.50	5.19%
VA	Hampton/Newport News	1	$32.60	$1,333.70	2.44%	1	$32.30	2.88%
VA	Henrico	2	$44.90	$1,970.40	2.28%	2	$44.60	2.34%
VA	Loudoun	1	$33.10	$1,536.10	2.15%	1	$32.80	2.23%
VA	Virginia Beach	1	$34.70	$1,695.20	2.05%	1	$34.20	2.07%
VA Recap: 16 stores with sales of $558.2 million. Total retail food sales for VA in the study: $25.55 billion. Whole Foods share of VA is 2.27%.								

Mid-Atlantic Recap: 37 stores with sales of $1.37 billion annually. Mid-Atlantic retail food sales total: $57.1 billion.
Whole Foods Per Store Average: $36.9 million ( ) Name in parentheses indicates another banner used by the company. Source: *Food World,* June 2022

IN REVIEW: KROGER

State	County	2022 Stores	2022 Sales (in millions)	2022 County Food Sales	% of 2022 County Market	2021 Stores	2021 Sales (in millions)	% of 2021 County Market
VA	Albemarle	3	$140.80	$677.40	20.79%	3	$138.40	21.57%
VA	Chesapeake City (Marketplace)	4	$123.20	$886.30	13.90%	4	$121.20	13.72%
VA	Chesterfield (Marketplace)	7	$260.20	$1,500.20	17.34%	7	$257.50	17.84%
VA	Gloucester	1	$20.80	$128.90	16.14%	1	$20.60	16.83%
VA	Hampton/Newport News	1	$32.40	$1,333.70	2.43%	1	$31.80	2.83%
VA	Hanover (Marketplace)	2	$98.80	$484.10	20.41%	2	$98.10	21.28%
VA	Henrico (Marketplace)	9	$285.80	$1,970.40	14.50%	9	$283.40	14.87%
VA	Isle Of Wight	1	$27.80	$91.50	30.38%	1	$27.40	30.68%
VA	Portsmouth City (Marketplace)	1	$41.40	$276.70	14.96%	1	$40.90	14.95%
VA	Suffolk City (Marketplace)	2	$72.60	$308.90	23.50%	2	$71.80	23.63%
VA	Virginia Beach (Marketplace)	5	$151.10	$1,695.20	8.91%	5	$149.60	9.04%
VA	York/VA	2	$43.30	$182.80	23.69%	2	$43.00	23.92%

VA Recap: 38 stores with sales of $1.3 billion. Total retail food sales for VA in the study: $25.55 billion. Kroger share of VA is 5.29%.

Mid-Atlantic Recap: 38 stores with sales of $1.3 billion annually. Mid-Atlantic retail food sales total: $57.1 billion.
Kroger Per Store Average: $34.16 million ( ) Name in parentheses indicates another banner used by the company. Source: *Food World,* June 2022

Central Pennsylvania Supermarket Leaders

- Eye Opener: TGC Share At 53.1%
- Excellent Comps Boost Weis
- C&S Indies Hold Serve
- Karns Adds Perry Co. Unit
- Competition Thwarts Big Gains

Rank	Company	2022 Stores	2022 Sales (in millions)	% of 2022 Market	2021 Stores	2021 Sales (in millions)	% of 2021 Market
1	The Giant Company (Martin's)	52	$2,310.31	53.11%	51	$2,206.58	53.01%
2	Weis Markets	38	$872.88	20.07%	38	$802.01	19.34%
3	C&S Independents	51	$233.30	5.36%	51	$232.25	5.60%
4	Karns Prime & Fancy Foods	10	$184.00	4.12%	9	$171.00	4.12%
5	Aldi	15	$129.40	2.97%	15	$125.70	2.99%
6	Wegmans	2	$125.70	2.89%	2	$124.40	3.00%
7	Family Owned Markets	7	$121.80	2.80%	7	$127.48	3.07%
8	Grocery Outlet	10	$63.20	1.45%	10	$64.10	1.55%
9	Redner's Markets	3	$50.30	1.16%	3	$49.80	1.20%
10	IGA	5	$49.40	1.14%	5	$47.32	1.14%
		193	**$4,140.29**	**95.18%**	**191**	**$3,950.64**	**95.28%**

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

Total supermarket sales for the area are $4.35 billion. Source: *Food World*, June 2022

Central Pennsylvania Market Leaders

- Alts. Stymied By Supers; Share 35.3%
- TGC: Unvanquished Against All Comers
- Target, WM Share Is 13.6%
- CVS, Rite Aid Control 7.8%
- Sheetz, TH, Rutters Pace C-Stores

Rank	Company	2022 Stores	2022 Sales (in millions)	% of 2022 Market	2021 Stores	2021 Sales (in millions)	% of 2021 Market
1	The Giant Company (Martin's)	52	$2,310.31	33.14%	51	$2,206.58	33.17%
2	Weis Markets	38	$872.88	12.52%	38	$802.01	12.06%
3	Walmart (SuperCenter)	20	$745.50	10.70%	20	$707.10	10.63%
4	CVS	73	$342.90	4.92%	74	$339.00	5.10%
5	Sheetz	71	$281.30	4.04%	71	$274.70	4.13%
6	C&S Independents	51	$233.30	3.35%	51	$232.25	3.49%
7	Target	11	$202.00	2.90%	11	$184.30	2.77%
8	Rite Aid	60	$201.60	2.89%	60	$196.10	2.95%
9	Karns Prime & Fancy Foods	10	$184.00	2.64%	9	$171.00	2.57%
10	Turkey Hill	117	$177.20	2.54%	113	$163.60	2.46%
11	Sam's Club	4	$168.60	2.42%	4	$162.00	2.44%
12	Rutter's Farm Stores	69	$137.20	1.97%	67	$127.50	1.92%
13	Aldi	15	$129.40	1.86%	15	$125.70	1.89%
14	Wegmans	2	$125.70	1.80%	2	$124.40	1.87%
15	Family Owned Markets	7	$121.80	1.75%	7	$127.48	1.92%
16	BJ's Wholesale Club	4	$114.10	1.64%	4	$113.20	1.70%
17	Costco	2	$88.50	1.27%	2	$82.50	1.24%
18	Grocery Outlet	10	$63.20	0.91%	10	$64.10	0.96%
19	Redner's Markets	3	$50.30	0.72%	3	$49.80	0.75%
20	IGA	5	$49.40	0.71%	5	$47.32	0.71%
		624	**$6,599.19**	**94.67%**	**617**	**$6,300.64**	**94.73%**

This chart lists the top 20 retailers in the Central Pennsylvania market which sell groceries, HBC, drugs, general merchandise and tobacco products. Volumes listed include 100% of store sales for supermarkets, c-stores and drug chains. Sales for club stores, Target and Walmart are extrapolated to include comparable categories, as explained in the formula on page 85. 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: $6.97 billion. Source: *Food World*, June 2022

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

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

Ahold Delhaize, Amsterdam, The Netherlands
Albertsons Companies, Boise, ID
Aldi, Batavia, IL
Amazon, Seattle, WA
Costco, Issaquah, WA
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

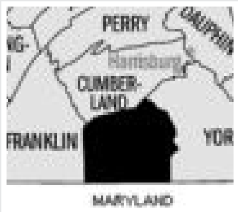
Food World
Food Trade News

FOR MORE INFORMATION, VISIT US AT WWW.FOODTRADENEWS.COM

PENNSYLVANIA COUNTY SHARE OF MARKET: 2022

Total sales for those Pennsylvania counties included in the study are $6.99 billion

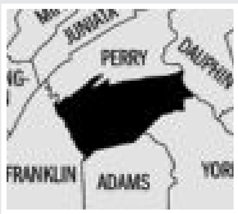
Rank	Company	Stores	Sales (in millions)	% of Market



ADAMS COUNTY ($215.1 million)
(Includes Gettysburg, Littlestown)

- Population 104,127
- # of Households 39,628
- Median Income $68,411
- Under age 18.................... 19.80%
- Over age 65...................... 21.10%
- Female 50.80%
- White 88.70%
- Black................................. 2.00%
- Hispanic 7.30%
- Asian................................. 0.90%

Rank	Company	Stores	Sales (in millions)	% of Market
1	The Giant Company	1	$62.03	28.84%
2	Weis Markets	2	$43.16	20.07%
3	IGA	3	$33.02	15.35%
4	Walmart	1	$21.80	10.13%
5	Sheetz	4	$18.20	8.46%
6	Rutter's Farm Stores	4	$9.50	4.42%
7	Rite Aid	2	$5.90	2.74%
8	7-Eleven	2	$5.60	2.60%
9	CVS	1	$5.20	2.42%
10	Turkey Hill	2	$3.50	1.63%
11	Royal Farm Stores	1	$2.60	1.21%
		23	**$210.51**	**97.87%**

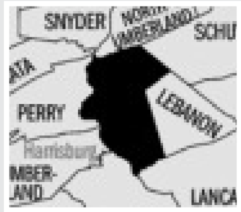


CUMBERLAND COUNTY ($1.2 billion)
(Includes Carlisle, Mechanicsville)

- Population 262,919
- # of Households 101,176
- Median Income $71,979
- Under age 18.................... 20.20%
- Over age 65...................... 18.80%
- Female 50.50%
- White 84.60%
- Black................................. 4.70%
- Hispanic 4.30%
- Asian................................. 4.80%

Rank	Company	Stores	Sales (in millions)	% of Market
1	The Giant Company	10	$472.87	39.19%
2	Walmart (SuperCenter)	4	$119.60	9.91%
3	Weis Markets	5	$109.93	9.11%
4	Karns Prime & Fancy Foods	4	$75.00	6.22%
5	CVS	14	$65.80	5.45%
6	Wegmans	1	$59.80	4.96%
7	Sheetz	14	$52.20	4.33%
8	Rite Aid	12	$44.70	3.70%
9	BJ's Wholesale Club	1	$38.50	3.19%
10	Aldi	4	$36.20	3.00%
11	Target	2	$35.80	2.97%
12	Sam's Club	1	$33.20	2.75%
13	Trader Joe's	1	$19.10	1.58%
14	Turkey Hill	8	$11.80	0.98%
15	Rutter's Farm Stores	5	$10.80	0.90%

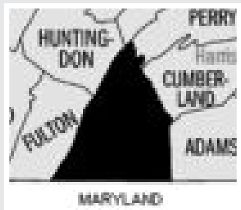
Rank	Company	Stores	Sales (in millions)	% of Market
16	Military Commissaries	1	$8.40	0.70%
17	7-Eleven	3	$7.40	0.61%
18	Grocery Outlet	1	$7.00	0.58%
		91	**$1,208.10**	**100.13%***



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

- Population 287,400
- # of Households 113,759
- Median Income $63,123
- Under age 18.................... 22.50%
- Over age 65...................... 17.40%
- Female 51.50%
- White 64.50%
- Black................................. 19.20%
- Hispanic 9.90%
- Asian................................. 5.30%

Rank	Company	Stores	Sales (in millions)	% of Market
1	The Giant Company	9	$454.73	42.61%
2	Walmart (SuperCenter)	2	$80.60	7.55%
3	Weis Markets	4	$71.75	6.72%
4	CVS	13	$61.20	5.73%
5	Karns Prime & Fancy Foods	3	$60.00	5.62%
6	Costco	1	$54.80	5.14%
7	Sheetz	12	$53.20	4.99%
8	Rite Aid	12	$41.20	3.86%
9	Sam's Club	1	$36.10	3.38%
10	Target	2	$29.40	2.76%
11	7-Eleven	10	$23.40	2.19%
12	Turkey Hill	16	$19.10	1.79%
13	Aldi	2	$18.90	1.77%
14	ShopRite (Price Rite)	1	$15.70	1.47%
15	C&S Independents	8	$12.50	1.17%
16	Sharp Shopper	1	$11.50	1.07%
17	Boyer's Markets	1	$11.18	1.05%
18	Save-A-Lot	1	$6.00	0.36%
19	Rutter's Farm Stores	2	$4.30	0.40%
		101	**$1,065.56**	**99.86%**



FRANKLIN COUNTY ($455.6 million)
(Includes Chambersburg, Greencastle, Waynesboro)

- Population 156,289
- # of Households 61,617
- Median Income $63,420
- Under age 18.................... 22.10%
- Over age 65...................... 20.10%
- Female 50.80%
- White 87.50%
- Black................................. 4.20%
- Hispanic 6.10%
- Asian................................. 1.10%

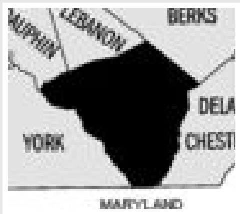
Rank	Company	Stores	Sales (in millions)	% of Market
1	The Giant Company (Martin's)	4	$156.58	34.37%
2	Walmart (SuperCenter)	2	$82.80	18.17%
3	Weis Markets	2	$36.22	7.95%
4	Sheetz	8	$32.20	7.07%
5	BJ's Wholesale Club	1	$29.40	6.45%

See **PENNSYLVANIA COUNTY SHARE** on page 92

PENNSYLVANIA COUNTY SHARE OF MARKET: 2022

Continued from page 90

6	CVS	5	$21.40	4.70%
7	Target	1	$17.80	3.91%
8	Rite Aid	4	$15.90	3.49%
9	Rutter's Farm Stores	7	$15.70	3.45%
10	Food Lion	1	$11.00	2.41%
11	Aldi	1	$7.80	1.71%
12	Save-A-Lot	2	$7.70	1.69%
13	Grocery Outlet	1	$6.60	1.45%
14	Walgreens	1	$5.80	1.27%
15	C&S Independents	2	$4.10	0.90%
16	Turkey Hill	1	$2.40	0.53%
		43	**$453.40**	**99.52%**



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

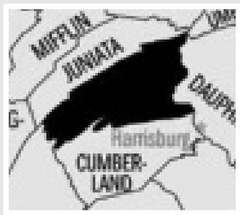
- Population 553,652
- # of Households 204,003
- Median Income $69,588
- Under age 18.................... 23.40%
- Over age 65...................... 18.40%
- Female 51.00%
- White 81.30%
- Black................................. 5.20%
- Hispanic 11.00%
- Asian................................. 2.50%

1	The Giant Company	14	$494.13	26.67%
2	Weis Markets	13	$308.27	16.64%
3	C&S Independents	20	$143.40	7.74%
4	Walmart (SuperCenter)	3	$136.50	7.37%
5	CVS	24	$114.20	6.16%
6	Turkey Hill	62	$98.20	5.30%
7	Family Owned Markets	4	$85.69	4.62%
8	Wegmans	1	$65.90	3.56%
9	Sheetz	16	$60.80	3.28%
10	Target	3	$59.20	3.19%
11	Whole Foods	1	$37.30	2.01%
12	Costco	1	$33.70	1.82%
13	Aldi	4	$33.30	1.80%
14	BJ's Wholesale Club	1	$25.40	1.37%
15	Sharp Shopper	2	$23.30	1.26%
16	Grocery Outlet	4	$23.10	1.25%
17	Wawa	4	$21.20	1.14%
18	Rite Aid	6	$17.70	0.96%
19	Redner's Markets	1	$14.70	0.79%
20	High's/Baltimore	4	$12.40	0.67%
21	Rutter's Farm Stores	5	$11.50	0.62%
22	7-Eleven	4	$8.80	0.47%
23	Lidl	1	$6.40	0.35%
24	Walgreens	1	$5.50	0.30%
25	Save-A-Lot	1	$4.70	0.25%
26	IGA	1	$4.16	0.22%
27	Royal Farm Stores	1	$2.40	0.13%
		202	**$1,851.85**	**99.94%**

LEBANON COUNTY ($438.8 million)
(Includes Lebanon)

- Population 143,493
- # of Households 53,857
- Median Income $61,632
- Under age 18.................... 22.70%
- Over age 65...................... 19.90%
- Female 50.80%
- White 81.00%
- Black................................. 3.70%
- Hispanic 14.10%
- Asian................................. 1.50%

1	The Giant Company	3	$93.96	21.41%
2	Walmart (SuperCenter)	2	$86.90	19.80%
3	Weis Markets	3	$65.55	14.94%
4	C&S Independents	7	$47.80	10.89%
5	Redner's Markets	2	$35.60	8.11%
6	Rite Aid	5	$17.40	3.97%
7	Turkey Hill	11	$17.10	3.90%
8	CVS	4	$17.00	3.87%
9	ShopRite (Price Rite)	1	$13.70	3.12%
10	Sheetz	2	$8.70	1.98%
11	America's Food Basket (Ideal)	1	$7.70	1.75%
12	Aldi	1	$7.10	1.62%
13	Save-A-Lot	1	$6.30	1.44%
14	Grocery Outlet	1	$5.80	1.32%
15	Rutter's Farm Stores	2	$4.60	1.05%
16	7-Eleven	1	$2.40	0.55%
		47	**$437.61**	**99.73%**



PERRY COUNTY ($115.1 million)
(Includes New Bloomfield)

- Population 45,986
- # of Households 18,512
- Median Income $70,660
- Under age 18.................... 21.30%
- Over age 65...................... 19.00%
- Female 49.40%
- White 95.00%
- Black................................. 1.20%
- Hispanic 2.30%
- Asian................................. 0.50%

1	Karns Prime & Fancy Foods	2	$31.00	26.93%
2	The Giant Company	1	$30.77	26.73%
3	Weis Markets	1	$19.46	16.91%
4	Rite Aid	3	$13.70	11.90%
5	Sheetz	2	$10.90	9.47%
6	C&S Independents	5	$4.80	4.17%
7	Rutter's Farm Stores	1	$2.60	2.26%
		15	**$113.23**	**98.38%**

See **PENNSYLVANIA COUNTY SHARE** on page 94

THANK YOU

TO OUR ASSOCIATES AND VENDOR PARTNERS FOR YOUR CONTINUAL HARD WORK AND DEDICATION YEAR-ROUND.

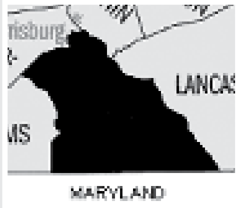
THE LITTLE THINGS ARE™

Giant®

GIANTFOOD.COM

PENNSYLVANIA COUNTY SHARE OF MARKET: 2022

Continued from page 92



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

- Population 458,696
- # of Households 174,425
- Median Income $68,940
- Under age 18.................... 22.00%
- Over age 65...................... 18.00%
- Female 50.60%
- White 82.60%
- Black................................. 7.10%
- Hispanic 8.10%
- Asian................................. 1.50%

1	The Giant Company	10	$545.24	33.19%
2	Weis Markets	8	$218.54	13.30%
3	Walmart (SuperCenter)	6	$217.30	13.23%
4	Sam's Club	2	$99.30	6.04%
5	Rutter's Farm Stores	43	$78.20	4.76%
6	Target	3	$59.80	3.64%
7	CVS	12	$58.10	3.54%
8	Rite Aid	16	$45.10	2.75%
9	Sheetz	13	$45.10	2.75%
10	Family Owned Markets	3	$36.11	2.20%
11	Aldi	3	$26.10	1.59%
12	Turkey Hill	17	$25.10	1.53%
13	Royal Farm Stores	8	$23.10	1.41%
14	BJ's Wholesale Club	1	$20.80	1.27%
15	C&S Independents	9	$20.70	1.26%
16	Grocery Outlet	3	$20.70	1.26%
17	Karns Prime & Fancy Foods	1	$18.00	1.10%
18	Walgreens	3	$17.10	1.04%
19	ShopRite	1	$14.30	0.87%
20	Great Valu	1	$13.60	0.83%
21	IGA	1	$12.22	0.74%
22	Lidl	1	$6.50	0.40%
23	7-Eleven	3	$6.30	0.38%
24	Food Lion	1	$4.90	0.30%
25	Save-A-Lot	1	$4.20	0.26%
26	High's/Baltimore	1	$3.00	0.18%
		171	**$1,639.41**	**99.80%**

( ) 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 2022

We remain grateful to our vendors, brokers and associates for their continued support.

weis
markets

IN REVIEW: WEIS MARKETS

State	County	2022 Stores	2022 Sales (in millions)	2022 County Food Sales	% of 2022 County Market	2021 Stores	2021 Sales (in millions)	% of 2021 County Market
DE	Sussex	4	$60.24	$1,002.10	6.01%	4	$59.90	6.20%

DE Recap: 4 stores with sales of $60.24 million. Total retail food sales for DE in the study: $1.53 billion. Weis Markets share of DE is 3.94%.

State	County	2022 Stores	2022 Sales (in millions)	2022 County Food Sales	% of 2022 County Market	2021 Stores	2021 Sales (in millions)	% of 2021 County Market
MD	Anne Arundel	3	$46.80	$2,327.80	2.01%	3	$47.38	2.08%
MD	Baltimore County	12	$275.81	$3,450.20	7.99%	12	$256.90	7.85%
MD	Calvert	3	$41.82	$398.40	10.50%	3	$41.50	10.72%
MD	Carroll	5	$97.01	$689.10	14.08%	5	$95.16	14.35%
MD	Charles	1	$11.68	$525.20	2.22%	1	$11.82	2.29%
MD	Frederick	6	$140.39	$967.00	14.52%	6	$126.38	13.93%
MD	Harford	2	$48.78	$1,036.90	4.70%	2	$44.71	4.38%
MD	Howard	3	$60.27	$1,203.10	5.01%	3	$59.10	5.03%
MD	Montgomery	2	$25.59	$3,765.80	0.68%	2	$26.97	0.74%
MD	Prince George's	3	$36.20	$3,223.10	1.12%	3	$38.57	1.25%
MD	St. Mary's	2	$25.23	$391.30	6.45%	2	$34.31	8.65%
MD	Talbot	1	$10.85	$227.80	4.76%	1	$10.89	5.02%
MD	Washington	3	$72.89	$555.10	13.13%	3	$65.57	12.60%

MD Recap: 46 stores with sales of $893.2 million. Total retail food sales for MD in the study: $21.57 billion. Weis Markets share of MD is 4.14%.

State	County	2022 Stores	2022 Sales (in millions)	2022 County Food Sales	% of 2022 County Market	2021 Stores	2021 Sales (in millions)	% of 2021 County Market
PA	Adams	2	$43.16	$215.10	20.07%	2	$35.14	17.53%
PA	Cumberland	5	$109.93	$1,206.50	9.11%	5	$100.45	8.82%
PA	Dauphin	4	$71.75	$1,067.10	6.72%	4	$70.09	6.86%
PA	Franklin	2	$36.22	$455.60	7.95%	2	$35.50	7.72%
PA	Lancaster	13	$308.27	$1,852.90	16.64%	13	$275.80	15.85%
PA	Lebanon	3	$65.55	$438.80	14.94%	3	$59.43	14.51%
PA	Perry	1	$19.46	$115.10	16.91%	1	$19.12	17.10%
PA	York	8	$218.54	$1,642.70	13.30%	8	$206.48	13.16%

PA Recap: 38 stores with sales of $872.88 million. Total retail food sales for PA in the study: $6.99 billion. Weis Markets share of PA is 12.48%.

State	County	2022 Stores	2022 Sales (in millions)	2022 County Food Sales	% of 2022 County Market	2021 Stores	2021 Sales (in millions)	% of 2021 County Market
VA	Culpeper	1	$12.26	$173.40	7.07%	1	$11.84	7.18%
VA	Spotsylvania	5	$55.20	$822.80	6.71%	5	$55.39	7.21%
VA	Stafford	3	$36.03	$437.90	8.23%	3	$40.66	9.49%

VA Recap: 9 stores with sales of $103.49 million. Total retail food sales for VA in the study: $25.55 billion. Weis Markets share of VA is 0.42%.

Mid-Atlantic Recap: 97 stores with sales of $1.93 billion annually. Mid-Atlantic retail food sales total: $57.1 billion.
Weis Markets Per Store Average: $19.9 million

Source: *Food World,* June 2022

Richmond Supermarket Leaders

- Kroger Sees Slight Share Gain
- Food Lion Growth Even Better
- Publix Remains Number 3
- Aldi Adds New Location
- Wegmans Tops In Per-Store Avg.

Rank	Company	2022 Stores	2022 Sales (in millions)	% of 2022 Market	2021 Stores	2021 Sales (in millions)	% of 2021 Market
1	Kroger (Marketplace)	18	$644.80	32.58%	18	$639.00	32.64%
2	Food Lion	49	$605.40	30.59%	48	$590.90	30.57%
3	Publix	16	$247.10	12.48%	16	$243.40	12.48%
4	Wegmans	2	$130.00	6.57%	2	$128.60	6.60%
5	Aldi	12	$92.60	4.68%	11	$80.80	4.17%
6	International Markets	6	$56.60	2.86%	6	$56.00	2.89%
7	Whole Foods	2	$44.90	2.27%	2	$44.60	2.30%
8	Lidl	6	$40.10	2.03%	6	$39.10	2.02%
9	The Fresh Market	4	$40.00	2.02%	4	$38.70	2.00%
10	Trader Joe's	2	$39.80	2.01%	2	$39.40	2.03%
		117	**$1,941.30**	**98.08%**	**115**	**$1,900.50**	**98.03%**

This chart lists the top 10 supermarket retailers in the Richmond market. Counties/cities included are: Charles City, Chesterfield, Dinwiddie, Goochland, Hanover, Henrico, New Kent and Powhatan. Petroleum sales are not included. ( ) Name in parentheses indicates another banner used by the company.
Total supermarket sales for the area are $1.98 billion. Source: *Food World*, June 2022

Richmond Market Leaders

- Alts. Share Reaches 51.6%
- WM Extends Lead Over Kroger
- Food Lion Posts Solid Comps
- WM, Target Now Control 20.9%
- Wawa Still Atop C-Stores

Rank	Company	2022 Stores	2022 Sales (in millions)	% of 2022 Market	2021 Stores	2021 Sales (in millions)	% of 2021 Market
1	Walmart (SC/Neighborhood Mkt)	18	$706.70	16.60%	18	$678.70	16.54%
2	Kroger (Marketplace)	18	$644.80	15.14%	18	$639.00	15.38%
3	Food Lion	49	$605.40	14.22%	48	$590.90	14.26%
4	Wawa	32	$289.60	6.80%	32	$289.03	7.05%
5	CVS	58	$278.90	6.55%	58	$263.00	6.41%
6	Publix	16	$247.10	5.80%	16	$243.40	5.93%
7	Walgreens	34	$203.40	4.78%	37	$212.20	5.17%
8	Target	12	$183.20	4.30%	12	$168.60	4.11%
9	7-Eleven	80	$163.00	3.83%	78	$158.30	3.86%
10	Wegmans	2	$130.00	3.05%	2	$128.60	3.13%
11	Sam's Club	3	$107.00	2.51%	3	$100.90	2.46%
12	Costco	2	$101.60	2.39%	2	$91.00	2.22%
13	Aldi	12	$92.60	2.17%	11	$80.80	1.97%
14	BJ's Wholesale Club	2	$77.60	1.82%	2	$76.80	1.87%
15	International Markets	6	$56.60	1.33%	6	$56.00	1.37%
16	Sheetz	13	$46.30	1.09%	11	$39.00	0.95%
17	Whole Foods	2	$44.90	1.05%	2	$44.60	1.09%
18	Fas-Marts	27	$41.50	0.97%	27	$42.70	1.04%
19	Lidl	6	$40.10	0.94%	6	$39.10	0.95%
20	The Fresh Market	4	$40.00	0.94%	4	$38.70	0.94%
		396	**$4,100.30**	**96.29%**	**393**	**$3,981.33**	**97.05%**

Chart lists top 20 retailers in the Richmond market which sell groceries, HBC, drugs, GM and tobacco products. Volumes listed include 100% of store sales for supermarkets, c-stores and drug chains. Sales for club stores, Target and Walmart are extrapolated to include comparable categories, as explained in the formula on page 85. 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: $4.26 billion.** Source: *Food World*, June 2022

GREAT BALLS OF FIRE

By Duke Winston

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

Following the record sales achieved by most retailers in 2021, it was a year of adjustment for the merchants who do business in the Richmond-Norfolk marketplace. And while the incredible gains made last year were not replicated (how could they be?) by most operators, the overall comparable store revenue numbers were good. Not surprisingly there was little new store activity in the Richmond, Hampton Roads or Charlottesville areas during the past 12 months as retailers were challenged by a supply chain system that continues to be dysfunctional.

Among the market leaders, Walmart, Wawa, Aldi and Target produced comp store sales higher than the industry average, but stalwart chains such as Kroger, Food Lion and even Publix achieved healthy comps. Of course, most of those sales gains over the past 12 months resulted from the spiraling inflation that has beset food retailers (and the overall U.S. economy) for almost a year now. When retailers are selling more stuff with 70 percent in-stock levels than they were when fill rates were over 90 percent, how else would you account for the increased volume achieved since the middle of last year after the worst impact of COVID was mostly behind us?

As Big Duke has done for more than 30 years, here's my take on the leading Richmond-Tidewater merchants and how those operators fared over the past 12 months.

***Walmart** – Once again, no new stores opened and there's no indication that the "Bentonville Behemoth" intends to add more physical stores in Richmond or Tidewater anytime soon. Duke has seen an expansion and improvement of the big retailer's e-commerce effort which includes curbside pickup and more micro-fulfillment centers attached to its stores. Despite a worse-than-industry average in-stock "batting average"(surprising only because nobody has more clout with their suppliers), Walmart continues to just sell an amazing amount of merchandise. And that ain't stopping anytime soon.*

***Kroger** – Let me start by saying Big Duke likes Lori Raya. The former Safeway and Albertsons executive who joined Kroger last August as Mid-Atlantic division president has brought energy to the associates and it's clear that morale at store level has improved. And while most of Kroger's Richmond-Norfolk stores produce high volumes, the supermarket retailer still needs to sharpen its store operations; frankly more than a few stores look a bit tired. Same store sales were decent (after coming off a strong 2021) but much like Walmart, the corporate minds running the company in Cincinnati are devoting most of their capital resources to*

See **GREAT BALLS** on page 101

THE GIANT COMPANY (TGC) AND EMPOWER AT THE BRIDGE FOUNDATION RECENTLY ANNOUNCED a new partnership to feed underserved families with nutritious foods grown locally while beginning to convert the city of Harrisburg's food desert into a food oasis. At the announcement of the new partnership in the "Giant Bleacher Garden" located at the old Bishop McDevitt High School, the future headquarters of The Bridge, Eco-Village in Harrisburg, PA, were (l-r) Jessica Groves, community impact manager, TGC; Amahl Pitts, chief executive officer, and Kerry MacDearmid, chief operations officer, Harrisburg City F.A.R.M.; Garry Gilliam, president, Empower at the Bridge Foundation and founder and CEO, The Bridge; Julie Morales, VP-finance, TGC; Pennsylvania Governor Tom Wolf; Glennis Harris, SVP-customer experience, TGC; Pennsylvania First Lady Frances Wolf; and Thelma Shifflett (Garry Gilliam's mother).

Amazon Accelerating Store Openings In DC Area

from page 1

units in the DC area as witnessed by two store openings this month in Manassas, VA and Lorton, VA. Another new Northern Virginia Amazon Fresh will open in late July or August in Arlington (Crystal City), VA. All three new stores feature Amazon's proprietary "Just Walk Out" cashierless technology. The Manassas unit, located on Sudley Road, is Amazon's largest to date, encompassing approximately 45,000 square feet. The Lorton unit is 38,000 square feet in size.

Even as it has been slow to open stores, the Seattle-based retailer continues to sign leases in greater Washington to add more locations. According to our research, new Amazon Fresh stores are slated to open in Bethesda, MD; Chevy Chase, MD (which would be the company's second store in that tony Maryland suburb); Alexandria, VA (Richmond Hwy.); Baileys Crossroads, VA; Falls Church, VA; Springfield VA; and three more DC locations (H Street NE; First Street NW; and Connecticut Avenue NW/Dupont Circle).

After the three openings in the DC area and another in Warrington, PA (through May 2022), four trade observers have pegged Amazon Fresh's average weekly volume to be slightly under $200,000 with higher than industry average out-of-stock levels. However, those same four observers noted that the stores were fulfilling an extraordinary number of online orders.

"Perhaps the primary motivation behind the entire Amazon Fresh idea was to provide more mobile hubs for the company to sell groceries that customers purchased online," one store operations executive told us. "Because if you analyze the stores from a merchandising, pricing and store ops perspective, you can understand why their weekly volumes are on the low side."

AISLE chatter

from page 4

will bring to Utz. Aligning Ferrara, Keebler, Mother's and Utz is a winning combination, and there's more in store for this creative and powerful partnership," said CEO of Utz Brands, **Dylan Lissette**.

"We are constantly looking for new ways to innovate with the consumer in mind, and so we are very excited to partner with Utz and break into the Sweet & Salty category to leverage our expertise in growing storied brands like Keebler and Mother's cookies and pair that with Utz's experience in potato chips, pretzels and more," said **Natalie Hagstrom**, general manager, cookies at Ferrara. "With our respective diverse portfolios of products, both brands are poised to fuel future innovations in the space."

There is no one set way for these brands to collaborate – with enough creativity, the sky is the limit on how and who these companies can create an alliance with. In what can often times be a dog-eat-dog world mindset in business, it is great seeing more and more of them working together to create more brand awareness for their participating lines, even if often times, it is just a marketing ploy to get more press in the public eye.

Just remember, as the inspirational Helen Keller once said, "Alone we can do so little; together we can do so much."

Until next month…

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

Richmond-Norfolk Supermarket Leaders

- Food Lion Grows R-N Share
- Kroger's #2 Slot Remains Firm
- HT Names DeBoer President
- Aldi Adds 2 New Locations
- Lidl With New Unit, Up To 17

Rank	Company	2022 Stores	2022 Sales (in millions)	% of 2022 Market	2021 Stores	2021 Sales (in millions)	% of 2021 Market
1	Food Lion	154	$2,005.60	37.12%	153	$1,968.10	37.06%
2	Kroger (Marketplace)	38	$1,298.20	24.03%	38	$1,283.70	24.13%
3	Harris Teeter	25	$621.90	11.51%	25	$614.90	11.62%
4	Wegmans	4	$271.00	5.02%	4	$268.40	5.05%
5	Publix	17	$260.50	4.82%	17	$256.60	4.83%
6	Aldi	31	$244.40	4.52%	29	$220.50	4.07%
7	Whole Foods	5	$148.10	2.74%	5	$146.70	2.77%
8	Lidl	17	$125.60	2.32%	16	$114.80	2.07%
9	Trader Joe's	6	$114.60	2.12%	6	$113.20	2.14%
10	The Fresh Market	9	$108.30	2.00%	9	$105.50	1.99%
		306	**$5,198.20**	**96.21%**	**302**	**$5,092.40**	**96.27%**

Chart lists the top 10 supermarket retailers in the Richmond-Norfolk market. Counties/cities included are: Albemarle, Caroline, Charles City, Chesapeake City, Chesterfield, Cumberland, Dinwiddie, Essex, Gloucester, Goochland, Greene, Hampton/Newport News City, Hanover, Henrico, Isle of Wight, James City, King & Queen, Lancaster, Louisa, Mathews, Middlesex, New Kent, Norfolk City, Northumberland, Nottoway, Orange, Portsmouth City, Powhatan, Prince George, Richmond, Southampton, Suffolk City, Surry, Sussex, Virginia Beach City and York. Petroleum sales are not included. ( ) Indicates alternate banner used by the company.
Total supermarket sales for the area are $5.4 billion. Source: *Food World*, June 2022

Richmond-Norfolk Market Leaders

- Alts. Share Flat At 49.6%
- FL, WM, Kroger Control 44.7%
- 7-Eleven Remains C-Store Leader
- Mass Merchants Capture 19.7%
- CVS At Top Of Drug Channel

Rank	Company	2022 Stores	2022 Sales (in millions)	% of 2022 Market	2021 Stores	2021 Sales (in millions)	% of 2021 Market
1	Food Lion	154	$2,005.60	17.05%	153	$1,968.10	17.07%
2	Walmart (SC/Neighborhood Mkt)	54	$1,956.10	16.63%	54	$1,860.80	16.47%
3	Kroger (Marketplace)	38	$1,298.20	11.03%	38	$1,283.70	11.03%
4	7-Eleven	375	$795.10	6.76%	376	$777.60	6.92%
5	Harris Teeter	25	$621.90	5.29%	25	$614.90	5.32%
6	CVS	120	$589.10	5.01%	120	$564.70	4.92%
7	Wawa	69	$512.79	4.36%	66	$481.37	4.29%
8	Walgreens	86	$478.40	4.07%	89	$473.60	4.10%
9	Target	25	$359.30	3.05%	25	$330.00	2.84%
10	Sam's Club	8	$289.90	2.46%	8	$274.80	2.45%
11	Wegmans	4	$271.00	2.30%	4	$268.40	2.32%
12	Publix	17	$260.50	2.21%	17	$256.60	2.24%
13	Aldi	31	$244.40	2.08%	29	$220.50	1.86%
14	Costco	5	$230.50	1.96%	5	$209.80	1.87%
15	Rite Aid	66	$229.50	1.95%	68	$227.00	2.02%
16	BJ's Wholesale Club	6	$216.10	1.84%	6	$213.50	1.90%
17	Whole Foods	5	$148.10	1.26%	5	$146.70	1.31%
18	Military Commissaries	6	$141.92	1.21%	6	$191.07	1.70%
19	Lidl	17	$125.60	1.07%	16	$114.80	1.02%
20	Trader Joe's	6	$114.60	0.97%	6	$113.20	1.01%
		1,117	**$10,888.61**	**92.55%**	**1,116**	**$10,591.14**	**94.31%**

Chart lists the top 20 retailers in the R-N market which sell groceries, HBC, drugs, GM and tobacco products. Volumes listed include 100% of store sales for supermarkets, c-stores and drug chains. Sales for club stores, Target and Walmart are extrapolated to include comparable categories, as explained in the formula on page 85. Petroleum sales not included. Counties/cities included are: Albemarle, Caroline, Charles City, Chesapeake City, Chesterfield, Cumberland, Dinwiddie, Essex, Gloucester, Goochland, Greene, Hampton/N News City, Hanover, Henrico, Isle of Wight, James City, King&Queen, Lancaster, Louisa, Mathews, Middlesex, New Kent, Norfolk City, Northumberland, Nottoway, Orange, Portsmouth City, Powhatan, Pr. George, Richmond, Southampton, Suffolk City, Surry, Sussex, Virginia Beach City, York. ( ) Alternate banner. **Total food sales for the area are: $11.65 billion.** Source: *Food World,* June 2022

GREAT BALLS OF FIRE

from page 99

e-commerce including developing large fulfillment centers (sheds) with British partner Ocado.

***Food Lion** – Steady as she blows. The Food Lion fleet is a large one, but the ships are still medium-sized. Ever since the Ahold Delhaize USA brand began investing in its stores and subtly increase its "fresh" presence, Food Lion has improved its customer image and sales. Today it is the best performing ADUSA banner, producing increased comp store revenue for 38 consecutive quarters. It proves you don't need to operate a 100,000 square foot big box to be effective. Additionally, during the past year, among the top 10 supermarket or mass merchants in the Richmond and Norfolk markets, Food Lion was the only retailer to open a new store (in New Kent County).*

***Harris Teeter** – A rather flat year for the upscale division of Kroger. Big Duke's visited about a dozen stores in the region – Charlottesville, Williamsburg, Virginia Beach and several others in Hampton Roads – and service levels seemed slightly below the industry average. However, HT customers are very loyal and, other than Wegmans - which it only competes with in Virginia Beach and Charlottesville – the Teeter still offers the best upscale shopping experience in the region. One thing to watch: how will new president Tammy DeBoer, who replaced HT veteran Rod Antolock earlier this year, fare in her new role? DeBoer, a native North Carolinian, is very smart, works hard and has plenty of industry experience to lean on. The transition will be interesting.*

***Publix** – For the first time in several years, the nation's most profitable grocery chain did not open a new store in the Richmond market. And while comp sales at its 16 area stores did not approach the double digit levels achieved corporately, the revenue gains were still very solid. Even though Big Duke believes that Publix could achieve more if its adapted to the local market more aggressively, slow and steady has always been the mantra for the Lakeland, FL-based chain. And while we show no new Publix stores planned for Richmond, the big chain will be entering the Tidewater market in the next couple of years with new stores slated for Norfolk and Suffolk. Another new Publix is also coming to Spotsylvania, which would be the company's second store in the Fredericksburg area. Slow and steady, slow and steady, slow and steady…*

***Aldi** – The German discounter with U.S. headquarters in Batavia, IL continues to roll along at a nice clip. During the past 12 months, it's opened two new stores (Albemarle and Chesterfield Counties) and continues to execute the fundamentals of discount retailing at a high level: clean stores that are easy to shop, excellent private label products and very low prices. With 31 stores in the Richmond-Tidewater-Charlottesville area, Aldi has attracted and maintained strong customer loyalty and produced excellent comps during this year of transition.*

PER STORE AVERAGES: 2022

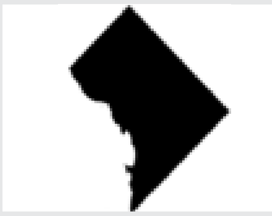
Rank	Company	Stores	2022 Sales (in millions)	Per Store Avg. (in millions)
1	Wegmans	23	$2,002.90	$87.08
2	Costco*	30	$1,898.80	$63.29
3	The Giant Company (Martin's)	63	$2,884.13	$45.78
4	Sam's Club*	26	$1,065.50	$40.98
5	Giant Food	160	$6,040.61	$37.75
6	Whole Foods (Amazon Fresh)	37	$1,365.80	$36.91
7	BJ's Wholesale Club	29	$1,059.90	$36.55
8	Walmart (SC/Neighborhood Mkt)*	160	$5,723.50	$35.77
9	Kroger (Marketplace)	38	$1,298.20	$34.16
10	Harris Teeter	78	$2,396.50	$30.72

( ) 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 85.

Source: *Food World,* June 2022

WASHINGTON, DC SHARE OF MARKET: 2022



DISTRICT OF COLUMBIA ($2.48 billion)

- Population 689,545
- # of Households 288,307
- Median Income $90,842
- Under age 18.................... 18.00%
- Over age 65...................... 12.20%

- Female 52.50%
- White 36.70%
- Black................................ 45.40%
- Hispanic 11.10%
- Asian................................. 4.10%

Rank	Company	Stores	Sales (in millions)	% of Market
1	CVS	59	$482.70	19.48%
2	Albertsons (Safeway)	12	$372.50	15.03%
3	Whole Foods (Amazon Fresh)	8	$305.80	12.34%
4	Giant Food	7	$279.80	11.29%
5	Harris Teeter	3	$160.80	6.49%
6	Trader Joe's	5	$141.40	5.71%
7	International Markets	12	$140.80	5.68%
8	Walmart (SuperCenter)	3	$105.80	4.27%
9	Target	5	$96.50	3.89%
10	7-Eleven	46	$84.20	3.40%
11	Costco	1	$66.10	2.67%
12	Walgreens	8	$61.30	2.47%
13	Streets Market	6	$47.70	1.92%
14	Military Commissaries	1	$21.39	0.86%
15	Wawa	6	$18.70	0.75%
16	MOM's Organic Market	1	$14.90	0.60%
17	Aldi	1	$12.90	0.52%
		184	**$2,413.29**	**97.38%**

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

Source: *Food World*, June 2022

Inflation Fuels Sales Gains; Giant, Walmart, CVS, Food Lion, Albertsons Lead Pack

from page 1

Giant Food, the market leader since *Food World's* first retail market study was published in 1979, remained atop the leaderboard, amassing sales of $6.04 billion at its 160 stores, one more than last year. The Landover, MD brand of Ahold Delhaize USA (ADUSA) continued its dominance in its core Baltimore-Washington market and also invested heavily over the past 12 months in its digital platform as it prioritizes its focus on omnichannel retailing.

Continuing to make gains in both overall and comp store sales was Walmart. The planet's largest retailer (and grocery merchant) remained in second place among all operators in the $57 billion market by once again not opening a new store (in fact, it closed a store in Owings Mills, MD). Extrapolated food and drug sales at its 160 stores increased to an estimated $5.72 billion. Like market leader Giant Food, the Bentonville, AR-based company continued to enhance its digital presence by adding micro-fulfillment centers and expanding curbside service at many of its SuperCenters.

CVS, the largest drug chain in the region, retained its third-place ranking in the market. The Woonsocket, RI-based drug merchant now operates 638 drug stores in the region (eight fewer than last year), which amassed an estimated an estimated $3.63 billion in annual sales.

Remaining in fourth place among all Mid-Atlantic merchants was Food Lion which continued to be the best performing brand in the ADUSA portfolio. The Salisbury, NC grocery chain now operates 255 stores (one more than last year) in the 89-county region and compiled estimated annual revenue of $3.29 billion.

Albertsons Mid-Atlantic division, which includes the Safeway, Acme, Kings and Balducci's banners, maintained its momentum that was created when the division was formed in 2020. Store conditions improved and all banners enjoyed in-store service levels that were higher than the industry average. During the year, the Malvern, PA-based division added two new stores (both former Shoppers' units) and posted sales of $3.21 billion at its 124 units.

The Giant Company, the ADUSA brand based in Carlisle, PA also performed well during the past 12 months. Sales at its 63 Giant and Martin's stores (one more than last year) in Pennsylvania, Maryland and Virginia rose to $2.88 billion.

Harris Teeter maintained its seventh-place position in the Mid-Atlantic region. The Matthews, NC-based Kroger subsidiary rang up estimated sales of $2.40 billion at its 78 stores. Earlier this year, industry veteran Tammy DeBoer replaced the now-retired Rod Antolock as president of the regional chain.

Continuing to upgrade its stores, convenience store leader 7-Eleven continued its improved performance over the past 12 months. Operating both corporately-owned and franchised c-stores, the Dallas, TX-based operator, which is owned by Japanese juggernaut Seven & i Holdings, now operates 1,088 stores in the Mid-Atlantic which produced an estimated $2.20 billion in annual sales.

Moving up two places to ninth among Mid-Atlantic retailers was Target. The Minneapolis-based mass merchant was also one of the best performers among all retailers in the region. During the past 12 months, Target opened one new store and now operates 111 units in the market ranging from SuperTargets (more than 175,000 square feet in size) to its urban model (about 25,000 square feet). Extrapolated annual revenue is estimated at $2.05 billion, a big jump from last year's estimated volume of $1.85 billion.

The growth of the region's 137 "International Markets" (specialty and ethnic supermarkets that are at least 20,000 square feet in size are grouped together in this survey) has been noteworthy. During the past 12 months, six more stores opened. And as the area's Latino and Asian populations continue to grow, we expect that the presence and stature of the "International Market" retail community to expand, too. Collectively, those stores rang up estimated annual sales of $2.04 billion.

Other retailers that topped the $1 billion mark in annual sales in the 89-county region included: Wegmans with 23 stores and an estimated annual volume of $2.0 billion (the highest per store sales average of any supermarket in the region); Weis Markets with 97 stores and annual revenue of $1.93 billion; Costco - 30 stores, estimated extrapolated annual sales of $1.90 billion (one of the best performers in the region); Walgreens - 323 stores and $1.84 billion in estimated annual sales; Whole Foods, with 34 natural and or-

See **MARKET STUDY** on page 103

MARKET STUDY
from page 102

ganic stores and three Amazon Fresh units that together amassed an estimated annual revenue of $1.37 billion; Kroger, which operated 38 stores in the Mid-Atlantic and garnered estimated annual sales of $1.30 billion; regional convenience store power Wawa (another stellar performer this year), whose 177 c-stores (eight more than last year) rang up annual sales of $1.23 billion; Aldi with 137 stores (nine more than last year) and estimated annual revenue of $1.13 billion; Sam's Club, which operates 26 club units in the Mid-Atlantic region, good for an extrapolated annual value estimate of $1.07 billion; and BJ's Wholesale Club - 29 stores with estimated extrapolated annual sales of $1.06 billion.

By class of trade, the leaders are: supermarkets - Giant Food (Landover) with 160 stores, $6.04 billion in sales; clubs - Costco with 30 stores, $1.90 billion in extrapolated sales; mass -Walmart with160 stores, $5.72 billion in extrapolated sales; drug - CVS with 638 stores and $3.63 billion in estimated sales; and convenience stores - 7-Eleven with 1,088 stores and an estimated $2.20 billion in revenue.

Additionally, the 20 military commissaries in the region rang up annual sales of $421.7 million, a huge drop from last year's sales total of $582.9 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 5,113 stores and accrued $55.6 billion in annual sales, good for 97.33 percent of the Mid-Atlantic region's $57 billion food and drug market.

Among all independent retailers (those operating between two and 17 stores), Baltimore-based B. Green once again led the pack with 11 stores that amassed annual sales of $213.9 million.

Karns Prime & Fancy Foods ranked second among all independent retailers in the region. The family-owned independent, based in Mechanicsburg, PA, now operates 10 stores, one more than last year, which rang up $184 million in sales.

Another Central PA-based retail marketing group, Family Owned Markets, which oversees eight independent supermarkets, compiled an aggregate volume of $141 million over the past 12 months. Streets Market, based in Washington, DC, added one more store (in Baltimore) over the past 12 months and amassed estimated annual revenue of $100.1 million.

Other perennial Mid-Atlantic independents on the leaderboard included: Graul's, McKay's, Eddie's of Roland Park, Geresbeck's (whose founder Carl Greeley passed away last month) and discount/closeout specialist Sharp Shopper.

As a combined group, the 11 multi-store independent retail organizations in the Mid-Atlantic operated 63 supermarkets which garnered estimated annual sales of $924.1 million. Collectively, those stores controlled 1.62 percent of the region's food and drug revenue.

PEOPLE

from page 20

Nielsen, the NPD Group and Sears.

"Brian's extensive experience in management, retail and the CPG industry will provide great value to Advantage Group International. I look forward to the high trust relationships that Brian will undoubtedly develop and nurture over the years, bringing our team and organization great value. He has a strong client-focused approach and a breadth of retail and CPG knowledge. This is exactly what we need in our industry and the American market," says Richard Cunningham, managing director USA, Advantage Group International.

Also joining Advantage Group International in the USA are **Kyla Caponigro** as client insights manager and **Abagail Logwood** as field research coordinator.

Caponigro will be responsible for supporting suppliers and retailers with their day-to-day needs and uncovering key actionable insights through data. She will leverage her client-side marketing, market research and analytic experience to tell the most relevant stories that connect clients with their strategies and business needs.

Logwood will manage the support activities necessary for executing Advantage benchmarking and Advantage Custom Research Solutions programs. She brings several years of managerial experience and training in quantitative analysis, research, and high-level problem solving to the team, reinforcing their strengths and broadening their skill set.

‘Bags Of Love’ Packing Day Held Last Month At EMD Sales Headquarters In Baltimore

Last month, members of the trade got together at EMD Sales headquarters in Baltimore for the annual ‘Bags of Love’ Packing Day. Among those volunteers on hand were (l-r) radio personality Pedro Biaggi, Elda Devarie, Roberto Devarie, Osvaldo Guerrero and Elvis Perez, EMD Sales.

This Safeway trio features (l-r) Marvin Belshes, Kiya Williams and Melanie Settles.

Here we have (front row l-r) Elda Devarie, EMD Sales; Felis Andrade and Liz Willey, Giant Food; (back row l-r) Jonathon Arons, Ernesto Otero, Brooke Loschiavo, Brianna Hill and Sabrina Avery, Giant Food.

These folks from Safeway are (l-r) Dana Harding, Dana Coates, Jing Wu, Beth Goldberg, Indranie Jinarain and Shazia Din.

IN REVIEW: ALDI

State	County	2022 Stores	2022 Sales (in millions)	2022 County Food Sales	% of 2022 County Market	2021 Stores	2021 Sales (in millions)	% of 2021 County Market
DC	Washington	1	$12.90	$2,478.30	0.52%	1	$12.60	0.52%
DC Recap: 1 store with sales of $12.9 million. Total retail food sales for DC in the study: $2.48 billion. Aldi share of DC is 0.52%.								
DE	Sussex	1	$9.10	$1,002.10	0.91%	0	$0.00	0.00%
DE	Kent	3	$24.40	$525.60	4.64%	3	$23.80	4.61%
DE Recap: 4 stores with sales of $33.5 million. Total retail food sales for DE in the study: $1.53 billion. Aldi share of DE is 2.19%.								
MD	Anne Arundel	6	$55.10	$2,327.80	2.37%	6	$53.90	2.37%
MD	Baltimore City	4	$25.90	$1,529.60	1.69%	4	$25.20	1.66%
MD	Baltimore County	11	$73.90	$3,450.20	2.14%	11	$73.80	2.25%
MD	Carroll	2	$17.20	$689.10	2.50%	1	$8.60	1.30%
MD	Cecil	1	$8.60	$289.50	2.97%	1	$8.20	2.94%
MD	Charles	1	$9.70	$525.20	1.85%	1	$9.20	1.78%
MD	Frederick	2	$21.10	$967.00	2.18%	2	$22.50	2.48%
MD	Harford	3	$20.20	$1,036.90	1.95%	3	$19.60	1.92%
MD	Howard	1	$12.10	$1,203.10	1.01%	1	$11.90	1.01%
MD	Montgomery	8	$70.20	$3,765.80	1.86%	6	$49.70	1.37%
MD	Prince George's	12	$102.50	$3,223.10	3.18%	11	$88.20	2.86%
MD	St. Mary's	1	$7.90	$391.30	2.02%	1	$7.50	1.89%
MD	Talbot	1	$8.40	$227.80	3.69%	1	$7.90	3.64%
MD	Washington	2	$15.10	$555.10	2.72%	2	$16.30	3.13%
MD	Wicomico	1	$11.00	$299.70	3.67%	1	$10.60	3.79%
MD Recap: 56 stores with sales of $458.9 million. Total retail food sales for MD in the study: $21.57 billion. Aldi share of MD is 2.13%.								
PA	Cumberland	4	$36.20	$1,206.50	3.00%	4	$35.40	3.11%
PA	Dauphin	2	$18.90	$1,067.10	1.72%	2	$18.30	1.79%
PA	Franklin	1	$7.80	$455.60	1.71%	1	$7.40	1.61%
PA	Lancaster	4	$33.30	$1,852.90	1.80%	4	$32.40	1.86%
PA	Lebanon	1	$7.10	$438.80	1.62%	1	$6.90	1.68%
PA	York	3	$26.10	$1,642.70	1.59%	3	$25.30	1.61%
PA Recap: 15 stores with sales of $129.4 million. Total retail food sales for PA in the study: $6.99 billion. Aldi share of PA is 1.85%.								
VA	Albemarle	1	$8.30	$677.40	1.23%	0	$0.00	0.00%
VA	Chesapeake City	3	$18.10	$886.30	2.04%	3	$17.70	2.00%
VA	Chesterfield	5	$40.80	$1,500.20	2.72%	4	$30.20	2.09%
VA	Culpeper	1	$9.30	$173.40	5.36%	1	$8.90	5.40%
VA	Fairfax	13	$122.90	$5,478.40	2.24%	13	$122.40	2.30%
VA	Frederick	1	$8.20	$522.40	1.57%	1	$7.90	1.59%
VA	Gloucester	1	$10.50	$128.90	8.15%	1	$9.90	8.09%
VA	Hampton/Newport News	3	$24.80	$1,333.70	1.86%	3	$24.30	2.17%
VA	Hanover	1	$8.60	$484.10	1.78%	1	$8.10	1.76%
VA	Henrico	6	$43.20	$1,970.40	2.19%	6	$42.50	2.23%
VA	James City	1	$8.20	$426.30	1.92%	1	$7.90	1.93%
VA	Loudoun	4	$40.20	$1,536.10	2.62%	4	$38.30	2.60%
VA	Norfolk City	2	$13.90	$790.50	1.76%	2	$13.40	1.78%
VA	Portsmouth City	1	$8.40	$276.70	3.04%	1	$8.10	2.96%
VA	Prince William	6	$36.10	$1,937.20	1.86%	5	$35.80	1.93%
VA	Spotsylvania	3	$17.00	$822.80	2.07%	3	$17.20	2.24%
VA	Stafford	1	$8.00	$437.90	1.83%	1	$7.80	1.82%
VA	Suffolk City	1	$11.30	$308.90	3.66%	1	$10.90	3.59%
VA	Virginia Beach	6	$48.30	$1,695.20	2.85%	6	$47.50	2.87%
VA	Warren	1	$7.60	$161.40	4.71%	1	$7.40	5.04%
VA Recap: 61 stores with sales of $493.7 million. Total retail food sales for VA in the study: $25.55 billion. Aldi share of VA is 1.98%.								

Mid-Atlantic Recap: 137 stores with sales of $1.13 billion annually. Mid-Atlantic retail food sales total: $57.1 billion.
Aldi Per Store Average: $8.24 million

Source: *Food World*, June 2022

Tidewater Supermarket Leaders

- Comps Help FL Extend Lead
- HT Solid With 20.1% Share
- Marketplace Aids Kroger Biz
- Aldi, Lidl In Discount Battle
- Wegmans' VA Beach Unit Zooming

Rank	Company	2022 Stores	2022 Sales (in millions)	% of 2022 Market	2021 Stores	2021 Sales (in millions)	% of 2021 Market
1	Food Lion	81	$1,117.90	41.16%	81	$1,101.60	41.04%
2	Harris Teeter	22	$547.30	20.15%	22	$541.20	20.13%
3	Kroger (Marketplace)	17	$512.60	18.87%	17	$506.30	18.91%
4	Aldi	18	$143.50	5.28%	18	$139.70	5.26%
5	Lidl	10	$77.70	2.86%	10	$75.70	2.85%
6	Wegmans	1	$69.10	2.54%	1	$68.40	2.56%
7	The Fresh Market	5	$68.30	2.51%	5	$66.80	2.51%
8	Whole Foods	2	$67.30	2.48%	2	$66.50	2.49%
9	Trader Joe's	3	$53.30	1.96%	3	$52.50	1.97%
10	International Markets	3	$40.40	1.49%	3	$40.00	1.52%
		162	**$2,697.40**	**99.31%**	**162**	**$2,658.70**	**99.62%**

The chart above lists the top 10 supermarket retailers in the Tidewater market. Counties/cities included are: Chesapeake City, Gloucester, Hampton/Newport News City, Isle of Wight, James City, Norfolk City, Portsmouth City, Suffolk City, Virginia Beach City and York. Petroleum sales are not included. ( ) Indicates alternate banner used by the company.
Total supermarket sales for the area are $2.72 billion. Source: *Food World*, June 2022

Tidewater Market Leaders

- Alts. Share Dips To 50.7%
- Food Lion Remains Mkt. Leader
- Strong Comps Boost Walmart
- 7-Eleven Dominates C-Stores
- Commissary Volume Drops Again

Rank	Company	2022 Stores	2022 Sales (in millions)	% of 2022 Market	2021 Stores	2021 Sales (in millions)	% of 2021 Market
1	Food Lion	81	$1,117.90	18.26%	81	$1,101.60	18.37%
2	Walmart (SC/Neighborhood Mkt)	29	$984.80	16.09%	29	$934.50	15.85%
3	7-Eleven	271	$578.30	9.45%	275	$569.20	9.43%
4	Harris Teeter	22	$547.30	8.94%	22	$541.20	8.97%
5	Kroger (Marketplace)	17	$512.60	8.37%	17	$506.30	8.39%
6	CVS	47	$244.20	3.99%	47	$238.40	3.99%
7	Walgreens	42	$224.20	3.66%	42	$213.10	3.64%
8	Wawa	35	$214.30	3.50%	34	$192.34	3.21%
9	Rite Aid	56	$194.50	3.18%	58	$193.10	3.33%
10	Target	12	$160.50	2.62%	12	$147.20	2.44%
11	Sam's Club	4	$156.40	2.56%	4	$148.60	2.53%
12	Aldi	18	$143.50	2.34%	18	$139.70	2.33%
13	BJ's Wholesale Club	4	$138.50	2.26%	4	$136.70	2.26%
14	Military Commissaries	5	$120.79	1.97%	5	$161.37	2.79%
15	Costco	2	$88.50	1.45%	2	$81.20	1.30%
16	Lidl	10	$77.70	1.27%	10	$75.70	1.26%
17	Wegmans	1	$69.10	1.13%	1	$68.40	1.11%
18	The Fresh Market	5	$68.30	1.12%	5	$66.80	1.13%
19	Whole Foods	2	$67.30	1.10%	2	$66.50	1.12%
20	Trader Joe's	3	$53.30	0.87%	3	$52.50	0.87%
		666	**$5,761.99**	**94.14%**	**671**	**$5,634.41**	**97.27%**

Chart lists top 20 retailers in the Tidewater market which sell groceries, HBC, drugs, GM and tobacco products. Volumes listed include 100% of store sales for supermarkets, c-stores and drug chains. Sales for club stores, Target and Walmart are extrapolated to include comparable categories, as explained in the formula on page 85. Petroleum sales not included. Counties/cities included: Chesapeake City, Gloucester, Hampton/Newport News City, Isle of Wight, James City, Norfolk, Portsmouth City, Suffolk City, Virginia Beach City and York. ( ) Indicates alternate banner used by the company.
Total food sales for the area are: $6.12 billion

Source: *Food World*, June 2022

State	County	2022 Stores	2022 Sales (in millions)	2022 County Food Sales	% of 2022 County Market	2021 Stores	2021 Sales (in millions)	% of 2021 County Market
DC	Washington	59	$482.70	$2,478.30	19.48%	64	$508.60	21.06%
DC Recap: 59 stores with sales of $482.7 million. Total retail food sales for DC in the study: $2.48 billion. CVS share of DC is19.48 %.								
DE	Kent	3	$16.90	$525.60	3.22%	3	$16.50	3.20%
DE	Sussex	6	$32.80	$1,002.10	3.27%	6	$32.00	3.31%
DE Recap: 9 stores with sales of $49.7 million. Total retail food sales for DE in the study: $1.53 billion. CVS share of DE is 3.25%.								
MD	Anne Arundel	22	$119.50	$2,327.80	5.13%	22	$116.20	5.11%
MD	Baltimore City	16	$92.80	$1,529.60	6.07%	16	$89.80	5.91%
MD	Baltimore County	26	$150.70	$3,450.20	4.37%	27	$149.80	4.58%
MD	Calvert	3	$14.60	$398.40	3.66%	3	$14.30	3.69%
MD	Carroll	6	$30.60	$689.10	4.44%	6	$30.40	4.58%
MD	Cecil	1	$5.00	$289.50	1.73%	1	$4.80	1.72%
MD	Charles	8	$40.10	$525.20	7.64%	8	$39.20	7.59%
MD	Frederick	12	$65.80	$967.00	6.80%	12	$64.40	7.10%
MD	Harford	8	$35.20	$1,036.90	3.39%	8	$34.70	3.40%
MD	Howard	9	$43.90	$1,203.10	3.65%	9	$42.80	3.64%
MD	Montgomery	43	$433.70	$3,765.80	11.52%	47	$451.60	12.41%
MD	Prince George's	49	$276.50	$3,223.10	8.58%	48	$257.50	8.35%
MD	Queen Anne's	1	$5.80	$158.90	3.65%	1	$5.60	4.09%
MD	St. Mary's	6	$26.50	$391.30	6.77%	5	$19.10	4.81%
MD	Talbot	2	$7.70	$227.80	3.38%	2	$7.40	3.41%
MD	Washington	7	$21.50	$555.10	3.87%	7	$21.40	4.11%
MD	Wicomico	2	$7.70	$299.70	2.57%	2	$6.90	2.47%
MD	Worcester	3	$18.90	$248.70	7.60%	3	$18.00	7.80%
MD Recap: 224 stores with sales of $1.4 billion. Total retail food sales for MD in the study: $21.57 billion. CVS share of MD is 6.47%.								
PA	Adams	1	$5.20	$215.10	2.42%	1	$4.90	2.45%
PA	Cumberland	14	$65.80	$1,206.50	5.45%	14	$64.10	5.63%
PA	Dauphin	13	$61.20	$1,067.10	5.74%	14	$62.30	6.10%
PA	Franklin	5	$21.40	$455.60	4.70%	5	$21.10	4.59%
PA	Lancaster	24	$114.20	$1,852.90	6.16%	24	$112.50	6.47%
PA	Lebanon	4	$17.00	$438.80	3.87%	4	$16.90	4.13%
PA	York	12	$58.10	$1,642.70	3.54%	12	$57.20	3.64%
PA Recap: 73 stores with sales of $342.9 million. Total retail food sales for PA in the study: $6.99 billion. CVS share of PA is 4.9%.								
VA	Accomack	1	$4.70	$100.80	4.66%	1	$4.30	4.44%
VA	Albemarle	8	$30.50	$677.40	4.50%	8	$29.80	4.64%
VA	Arlington	19	$111.60	$963.20	11.59%	18	$100.70	10.60%
VA	Caroline	1	$4.40	$33.60	13.10%	1	$4.20	12.96%
VA	Chesapeake City	6	$38.40	$886.30	4.33%	6	$37.50	4.25%
VA	Chesterfield	22	$105.80	$1,500.20	7.05%	22	$99.30	6.88%
VA	Culpeper	2	$7.20	$173.40	4.15%	2	$6.90	4.19%
VA	Dinwiddie	1	$5.80	$134.90	4.30%	1	$5.50	4.20%
VA	Fairfax	67	$340.10	$5,478.40	6.21%	66	$319.60	5.99%
VA	Fauquier	2	$7.80	$188.40	4.14%	2	$7.50	4.24%
VA	Frederick	8	$29.70	$522.40	5.69%	8	$29.10	5.86%
VA	Greene	1	$4.60	$17.60	26.14%	1	$4.40	19.13%
VA	Hampton/Newport News	8	$36.10	$1,333.70	2.71%	8	$35.70	3.18%
VA	Hanover	6	$32.30	$484.10	6.67%	5	$23.80	5.16%
VA	Henrico	28	$130.30	$1,970.40	6.61%	29	$129.90	6.82%
VA	Isle of Wight	2	$10.70	$91.50	11.69%	2	$10.50	11.76%
VA	James City	6	$31.50	$426.30	7.39%	6	$31.20	7.62%
VA	King George	1	$4.90	$96.60	5.07%	1	$4.80	5.29%
VA	Lancaster	1	$3.90	$84.30	4.63%	1	$3.80	4.78%
VA	Loudoun	12	$55.40	$1,536.10	3.61%	12	$53.60	3.64%
VA	Louisa	1	$6.00	$49.70	12.07%	1	$4.90	10.19%
VA	Norfolk City	7	$43.70	$790.50	5.53%	7	$43.00	5.70%
VA	Orange	2	$12.10	$126.60	9.56%	2	$11.80	9.78%
VA	Page	1	$4.90	$73.40	6.68%	1	$4.70	6.78%
VA	Portsmouth City	3	$15.40	$276.70	5.57%	3	$14.90	5.45%
VA	Powhatan	1	$4.70	$76.90	6.11%	1	$4.50	6.11%
VA	Prince George	1	$4.50	$80.20	5.61%	1	$4.40	5.18%
VA	Prince William	18	$88.60	$1,937.20	4.57%	18	$85.10	4.58%
VA	Shenandoah	1	$4.00	$122.40	3.27%	1	$3.90	3.27%
VA	Spotsylvania	14	$77.80	$822.80	9.46%	15	$78.40	10.21%
VA	Stafford	5	$23.80	$437.90	5.44%	5	$23.50	5.49%
VA	Suffolk City	1	$5.10	$308.90	1.65%	1	$4.90	1.61%
VA	Virginia Beach	13	$58.70	$1,695.20	3.46%	13	$56.20	3.40%
VA	Warren	2	$7.80	$161.40	4.83%	2	$7.50	5.11%
VA	York	1	$4.60	$182.80	2.52%	1	$4.50	2.50%
VA Recap: 273 stores with sales of $1.36 billion. Total retail food sales for VA in the study: $25.55 billion. CVS share of VA is 5.53%.								

Mid-Atlantic Recap: 638 stores with sales of $3.63 billion annually. Mid-Atlantic retail food sales total: $57.1 billion.

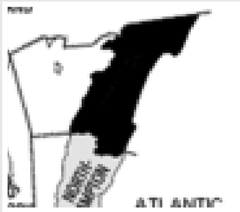
CVS Per Store Average: $5.69 million

Source: *Food World*, June 2022

VIRGINIA COUNTY SHARE OF MARKET: 2022

Total sales for those Virginia counties included in this study are $25.5 billion

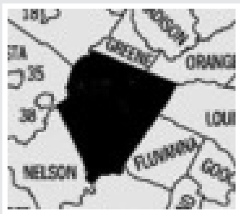
ACCOMACK COUNTY ($100.8 million) (Includes Chincoteague)



- Population 33,246
- # of Households 13,641
- Median Income $46,178
- Under age 18.................... 20.70%
- Over age 65...................... 24.60%
- Female 51.30%
- White 59.90%
- Black............................... 28.80%
- Hispanic 9.10%
- Asian................................. 0.80%

Rank	Company	Stores	Sales (in millions)	% of Market
1	Food Lion	2	$33.20	32.94%
2	Walmart (SuperCenter)	1	$33.00	32.74%
3	Royal Farm Stores	5	$12.10	12.00%
4	Fas-Marts	3	$6.10	6.05%
5	Walgreens	1	$5.50	5.46%
6	Great Valu	1	$5.30	5.26%
7	CVS	1	$4.70	4.66%
8	C&S Independents	1	$2.50	2.48%
		15	**$102.40**	**101.59%***

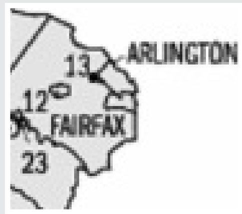
ALBEMARLE COUNTY Including CHARLOTTESVILLE ($677.4 million) (Includes, Keswick, White Hall)



- Population 159,207
- # of Households 61,195
- Median Income $72,121
- Under age 18.................... 17.90%
- Over age 65...................... 15.80%
- Female 51.40%
- White 71.60%
- Black............................... 14.10%
- Hispanic 5.80%
- Asian................................. 6.30%

Rank	Company	Stores	Sales (in millions)	% of Market
1	Kroger	3	$140.80	20.79%
2	Harris Teeter	3	$74.60	11.01%
3	Wegmans	1	$71.90	10.61%
4	Food Lion	6	$66.80	9.86%
5	Costco	1	$40.40	5.96%
6	Walmart	1	$38.90	5.74%
7	Whole Foods	1	$35.90	5.30%
8	Giant Food	1	$35.22	5.20%
9	CVS	8	$30.50	4.50%
10	Sam's Club	1	$26.50	3.91%
11	Trader Joe's	1	$21.50	3.17%
12	7-Eleven	8	$16.80	2.48%
13	Target	1	$15.60	2.30%
14	Fas-Marts	6	$13.90	2.05%
15	Walgreens	2	$10.20	1.51%
16	Great Valu	1	$9.20	1.36%
17	Wawa	2	$8.89	1.31%
18	Aldi	1	$8.30	1.23%
19	Lidl	1	$7.80	1.15%
20	Circle K	1	$2.60	0.38%
		50	**$676.31**	**99.84%**

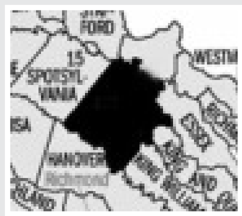
ARLINGTON COUNTY ($963.2 million) (Includes Arlington)



- Population 232,965
- # of Households............... 108,604
- Median Income $122,604
- Under age 18.................... 18.10%
- Over age 65...................... 11.10%
- Female 49.90%
- White 61.40%
- Black................................. 9.70%
- Hispanic 15.60%
- Asian............................... 11.00%

Rank	Company	Stores	Sales (in millions)	% of Market
1	Harris Teeter	6	$265.70	27.59%
2	Giant Food	4	$111.98	11.63%
3	CVS	19	$111.60	11.59%
4	Whole Foods	2	$79.80	8.28%
5	Albertsons (Safeway)	4	$74.10	7.69%
6	Costco	1	$73.40	7.62%
7	7-Eleven	26	$58.40	6.06%
8	Target	2	$46.00	4.78%
9	Trader Joe's	1	$34.60	3.59%
10	Walgreens	5	$34.00	3.53%
11	Military Commissaries	1	$28.57	2.97%
12	MOM's Organic Market	1	$14.70	1.53%
13	International Markets	1	$13.30	1.38%
14	Lidl	1	$8.70	0.90%
15	Streets Market	1	$6.90	0.72%
		75	**$961.75**	**99.85%**

CAROLINE COUNTY ($33.6 million) (Includes Bowling Green)



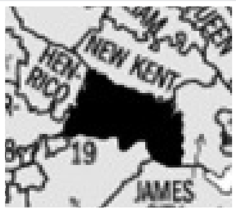
- Population 31,332
- # of Households 10,978
- Median Income $67,901
- Under age 18.................... 22.80%
- Over age 65...................... 16.90%
- Female 50.50%
- White 63.20%
- Black............................... 27.20%
- Hispanic 5.20%
- Asian................................. 1.10%

Rank	Company	Stores	Sales (in millions)	% of Market
1	Food Lion	2	$16.70	49.70%
2	Walgreens	1	$5.00	14.88%
3	Sheetz	1	$4.80	14.29%
4	CVS	1	$4.40	13.10%
5	7-Eleven	1	$2.50	7.44%
		6	**$33.40**	**99.40%**

See VIRGINIA COUNTY SHARE on page 109

VIRGINIA COUNTY SHARE OF MARKET: 2022

Continued from page 108

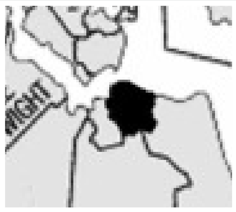


CHARLES CITY COUNTY ($5.1 million)

(Includes Charles City. Multi-store retailers do not operate in this county.)

- Population 6,594
- # of Households 2,998
- Median Income $60,096
- Under age 18................... 14.70%
- Over age 65..................... 25.50%
- Female 51.50%
- White 43.60%
- Black............................... 44.40%
- Hispanic 1.80%
- Asian................................. 0.60%

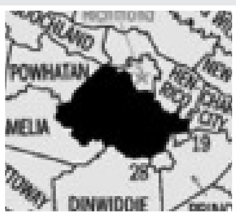
Multi-store retailers do not operate in this county.



CHESAPEAKE CITY ($886.3 million)

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

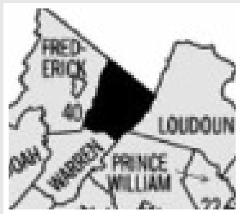
1	Walmart (SC/Neighborhood Mkt)	6	$165.10	18.63%
2	Food Lion	12	$147.50	16.64%
3	Kroger (Marketplace)	4	$123.20	13.90%
4	Harris Teeter	3	$77.90	8.79%
5	Sam's Club	2	$75.20	8.48%
6	7-Eleven	33	$68.70	7.75%
7	CVS	6	$38.40	4.33%
8	Target	3	$31.20	3.52%
9	BJ's Wholesale Club	1	$29.60	3.34%
10	Wawa	5	$29.60	3.34%
11	Rite Aid	9	$29.40	3.32%
12	Walgreens	6	$27.10	3.06%
13	Aldi	3	$18.10	2.04%
14	Miller Marts	4	$9.30	1.05%
15	Lidl	1	$7.90	0.89%
16	Circle K	2	$3.70	0.42%
17	Royal Farm Stores	1	$2.90	0.33%
		101	**$884.80**	**99.83%**



CHESTERFIELD COUNTY Includes COLONIAL HEIGHTS ($1.5 billion) (Inlcuding Chester, Midlothian)

- Population 388,961
- # of Households 134,324
- Median Income $72,584
- Under age 18................... 23.60%
- Over age 65..................... 17.60%
- Female 53.00%
- White 65.70%
- Black............................... 20.60%
- Hispanic 8.10%
- Asian................................. 3.80%

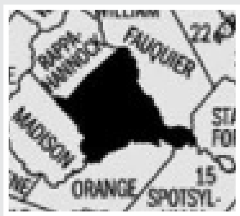
1	Kroger (Marketplace)	7	$260.20	17.34%
2	Walmart (SC/Neighborhood Mkt)	6	$233.60	15.57%
3	Food Lion	17	$212.80	14.18%
4	Wawa	14	$115.40	7.69%
5	CVS	22	$105.80	7.05%
6	Publix	5	$79.20	5.28%
7	Target	5	$66.30	4.42%
8	Sam's Club	2	$65.30	4.35%
9	Wegmans	1	$63.90	4.26%
10	Walgreens	9	$56.90	3.79%
11	Costco	1	$53.20	3.55%
12	7-Eleven	21	$43.40	2.89%
13	Aldi	5	$40.80	2.72%
14	Trader Joe's	1	$20.80	1.39%
15	International Markets	3	$20.60	1.37%
16	Sheetz	5	$15.90	1.06%
17	Fresh Market	2	$15.20	1.01%
18	Lidl	2	$13.70	0.91%
19	Rite Aid	4	$13.30	0.89%
20	Royal Farm Stores	1	$3.90	0.26%
21	Circle K	1	$2.10	0.14%
22	Dash-In	1	$2.00	0.13%
		135	**$1,504.30**	**100.27%***



CLARKE COUNTY ($16.1 million) (Includes Berryville, Boyce)

- Population 14,881
- # of Households 5,690
- Median Income $86,154
- Under age 18................... 19.50%
- Over age 65..................... 21.80%
- Female 50.50%
- White 85.30%
- Black................................. 4.70%
- Hispanic 2.50%
- Asian................................. 1.40%

1	7-Eleven	3	$7.20	44.72%
2	Sheetz	1	$4.00	24.84%
3	Circle K	1	$2.00	12.42%
		5	**$13.20**	**81.99%**



CULPEPER COUNTY ($173.4 million) (Includes Culpeper, Rapidan)

- Population 53,596
- # of Households 17,474
- Median Income $80,663
- Under age 18................... 24.70%
- Over age 65..................... 16.00%
- Female 50.10%
- White 69.80%
- Black............................... 14.60%
- Hispanic 11.60%
- Asian................................. 1.70%

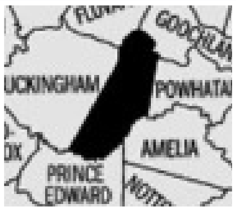
1	The Giant Company (Martin's)	1	$45.94	26.49%
2	Walmart (SuperCenter)	1	$32.10	18.51%
3	Target	1	$15.30	8.82%
4	Albertsons (Safeway)	1	$14.90	8.59%
5	7-Eleven	6	$13.80	7.96%
6	Walgreens	2	$12.60	7.27%
7	Weis Markets	1	$12.26	7.07%

See VIRGINIA COUNTY SHARE on page 110

VIRGINIA COUNTY SHARE OF MARKET: 2022

Continued from page 109

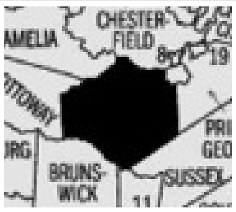
8	Aldi	1	$9.30	5.36%
9	Lidl	1	$7.60	4.38%
10	CVS	2	$7.20	4.15%
		17	**$171.00**	**98.62%**



CUMBERLAND COUNTY ($9.4 million)
(Includes Cumberland)

- Population 9,681
- # of Households 4,112
- Median Income $50,565
- Under age 18.................... 18.90%
- Over age 65...................... 23.10%
- Female 51.60%
- White 63.50%
- Black............................... 30.50%
- Hispanic 3.20%
- Asian................................ 0.50%

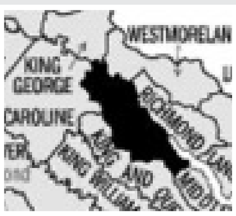
Multi-store retailers do not operate in this county.



DINWIDDIE COUNTY Including PETERSBURG ($134.9 million)
(Includes Dinwiddie, Church Road)

- Population 61,341
- # of Households 23,634
- Median Income $54,257
- Under age 18.................... 21.30%
- Over age 65...................... 17.50%
- Female 52.30%
- White 38.70%
- Black............................... 54.60%
- Hispanic 4.40%
- Asian................................ 1.00%

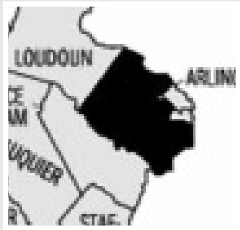
1	Walmart (SuperCenter)	1	$43.10	31.95%
2	Food Lion	4	$38.80	28.76%
3	Walgreens	2	$10.90	8.08%
4	7-Eleven	2	$5.80	4.30%
5	CVS	1	$5.80	4.30%
6	International Markets	1	$5.70	4.23%
7	Wawa	1	$5.60	4.15%
8	Save-A-Lot	1	$5.50	4.08%
9	Rite Aid	1	$4.50	3.34%
10	Sheetz	1	$4.30	3.19%
11	Fas-Marts	1	$2.10	1.56%
		16	**$132.10**	**97.92**



ESSEX COUNTY ($66.7 million)
(Includes Tappahannock)

- Population 10,573
- # of Households 4,551
- Median Income $51,125
- Under age 18.................... 18.40%
- Over age 65...................... 23.70%
- Female 53.10%
- White 54.90%
- Black............................... 37.40%
- Hispanic 3.90%
- Asian................................ 1.20%

1	Walmart	1	$42.50	63.72%
2	Food Lion	1	$11.70	17.54%
3	Walgreens	1	$5.20	7.80%
4	Sheetz	1	$3.80	5.70%
5	Fas-Marts	1	$2.30	3.45%
		5	**$65.50**	**98.20%**



FAIRFAX CO. Including FALLS CHURCH, FAIRFAX, ALEXANDRIA ($5.5 billion)
(Includes McLean, Reston, Springfield)

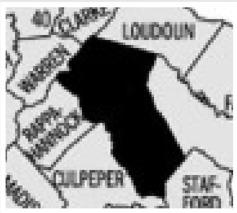
- Population 1,333,195
- # of Households 488,352
- Median Income $133,274
- Under age 18.................... 22.60%
- Over age 65...................... 14.30%
- Female 50.90%
- White 60.20%
- Black................................. 9.80%
- Hispanic 13.60%
- Asian............................... 13.70%

1	Giant Food	29	$1,001.13	18.27%
2	Albertsons (Safeway)	27	$615.70	11.24%
3	International Markets	33	$439.60	8.02%
4	Wegmans	4	$417.20	7.62%
5	Costco	4	$384.20	7.01%
6	Harris Teeter	10	$382.50	6.98%
7	CVS	67	$340.10	6.21%
8	Whole Foods (Amazon Fresh)	8	$297.20	5.42%
9	Target	11	$250.50	4.57%
10	Walmart	8	$243.10	4.44%
11	7-Eleven	134	$226.50	4.13%
12	Trader Joe's	7	$193.80	3.54%
13	BJ's Wholesale Club	3	$131.70	2.40%
14	Walgreens	22	$129.50	2.36%
15	Aldi	13	$122.90	2.24%
16	Military Commissaries	1	$54.85	1.00%
17	MOM's Organic Market	3	$50.80	0.93%
18	Lidl	5	$46.90	0.86%
19	Shoppers	1	$31.80	0.58%
20	Food Lion	2	$31.00	0.57%
21	Fresh Market	2	$24.70	0.45%
22	Sprouts	1	$19.40	0.35%
23	Wawa	2	$7.90	0.14%
24	Streets Market	1	$7.20	0.13%
25	Circle K	2	$5.60	0.10%
26	ASG (Compare)	1	$5.02	0.09%
27	Sheetz	1	$4.20	0.08%
28	C&S Independents	3	$1.70	0.03%
		405	**$5,466.70**	**99.79%**

See **VIRGINIA COUNTY SHARE** on page 111

VIRGINIA COUNTY SHARE OF MARKET: 2022

Continued from page 110



FAUQUIER COUNTY ($188.4 million) (Includes Remington, Warrenton)

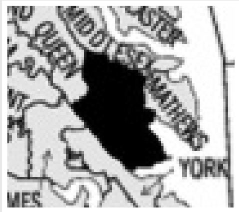
- Population 73,815
- # of Households 24,617
- Median Income $105,665
- Under age 18.................... 23.10%
- Over age 65...................... 16.90%
- Female 50.60%
- White 79.00%
- Black................................. 7.80%
- Hispanic 9.20%
- Asian................................. 1.70%

1	Giant Food	1	$38.81	20.60%
2	Walmart (SuperCenter)	1	$37.80	20.06%
3	Food Lion	3	$23.60	12.53%
4	Albertsons (Safeway)	1	$19.90	10.56%
5	Harris Teeter	1	$19.20	10.19%
6	Sheetz	3	$12.10	6.42%
7	Walgreens	2	$11.10	5.89%
8	7-Eleven	3	$7.80	4.14%
9	CVS	2	$7.80	4.14%
10	Wawa	1	$4.00	2.12%
11	Royal Farm Stores	1	$3.80	2.02%
12	Circle K	1	$2.10	1.11%
		20	**$188.01**	**99.79%**

FREDERICK COUNTY ($522.4 million) (Includes Stephens City)

- Population 121,853
- # of Households 42,763
- Median Income $70,557
- Under age 18.................... 22.60%
- Over age 65...................... 17.10%
- Female 50.50%
- White 74.00%
- Black................................. 8.00%
- Hispanic 13.80%
- Asian................................. 2.80%

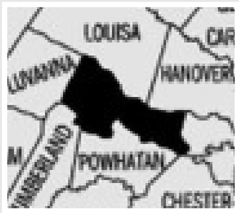
1	The Giant Company (Martin's)	3	$161.83	30.98%
2	Walmart (SuperCenter)	3	$150.10	28.73%
3	Costco	1	$58.70	11.24%
4	CVS	8	$29.70	5.69%
5	Target	2	$27.80	5.32%
6	Sheetz	6	$24.80	4.75%
7	Walgreens	4	$23.20	4.44%
8	Sharp Shopper	1	$16.40	3.14%
9	7-Eleven	9	$14.80	2.83%
10	Aldi	1	$8.20	1.57%
11	Royal Farm Stores	1	$3.80	0.73%
		39	**$519.33**	**99.41%**



GLOUCESTER COUNTY ($128.9 million) (Includes Gloucester)

- Population 39,069
- # of Households 14,792
- Median Income $71,649
- Under age 18.................... 19.90%
- Over age 65...................... 19.60%
- Female 50.80%
- White 84.70%
- Black................................. 8.00%
- Hispanic 3.80%
- Asian................................. 9.00%

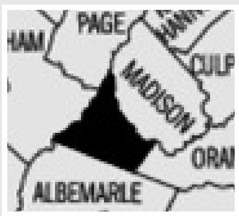
1	Walmart (SuperCenter)	1	$37.10	28.78%
2	Food Lion	2	$23.10	17.92%
3	Kroger	1	$20.80	16.14%
4	7-Eleven	8	$15.20	11.79%
5	Aldi	1	$10.50	8.15%
6	Rite Aid	2	$8.00	6.21%
7	Wawa	1	$7.30	5.66%
8	Walgreens	1	$5.40	4.19%
		17	**$127.40**	**98.84%**



GOOCHLAND COUNTY ($34.8 million) (Includes Goochland, Manakin)

- Population 25,488
- # of Households 8,711
- Median Income $97,146
- Under age 18.................... 17.20%
- Over age 65...................... 22.90%
- Female 50.90%
- White 77.80%
- Black............................... 15.80%
- Hispanic 3.10%
- Asian................................. 1.70%

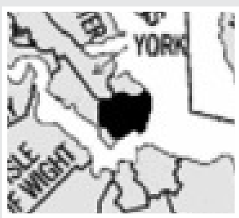
1	Food Lion	2	$22.10	63.51%
2	Wawa	1	$9.00	25.86%
		3	**$31.10**	**89.37%**



GREENE COUNTY ($17.6 million) (Includes Stanardsville)

- Population 20,968
- # of Households 7,491
- Median Income $67,266
- Under age 18.................... 23.80%
- Over age 65...................... 17.80%
- Female 51.30%
- White 82.20%
- Black................................. 7.30%
- Hispanic 6.00%
- Asian................................. 2.00%

1	Food Lion	1	$9.70	55.11%
2	CVS	1	$4.60	26.14%
		2	**$14.30**	**81.25%**



HAMPTON/NEWPORT NEWS CITY ($1.3 billion)

- Population 322,333
- # of Households 125,223
- Median Income $55,776
- Under age 18.................... 22.00%
- Over age 65...................... 14.50%
- Female 51.90%
- White 39.90%
- Black............................... 47.10%
- Hispanic 7.80%
- Asian................................. 2.90%

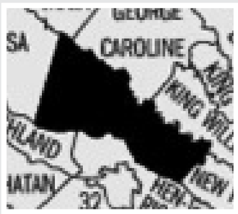
1	Food Lion	16	$284.80	21.35%
2	Walmart (SC/Neighborhood Mkt)	5	$158.40	11.88%
3	7-Eleven	58	$123.70	9.27%

See **VIRGINIA COUNTY SHARE** on page 112

VIRGINIA COUNTY SHARE OF MARKET: 2022

Continued from page 111

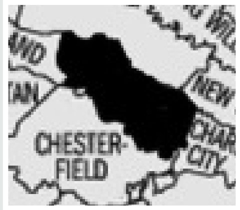
4	Military Commissaries	2	$47.83	3.59%
5	Walgreens	8	$47.40	3.55%
6	Wawa	7	$42.10	3.16%
7	Harris Teeter	2	$40.90	3.07%
8	Costco	1	$40.20	3.01%
9	BJ's Wholesale Club	1	$38.80	2.91%
10	Sam's Club	1	$37.60	2.82%
11	CVS	8	$36.10	2.71%
12	Rite Aid	9	$33.10	2.48%
13	Whole Foods	1	$32.60	2.44%
14	Kroger	1	$32.40	2.43%
15	Target	2	$28.00	2.10%
16	Lidl	3	$26.20	1.96%
17	Aldi	3	$24.80	1.86%
18	Trader Joe's	1	$16.20	1.21%
19	Fresh Market	1	$12.40	0.93%
20	International Markets	1	$11.90	0.89%
21	Miller Marts	4	$8.10	0.61%
22	Save-A-Lot	1	$6.10	0.46%
23	Circle K	1	$2.00	0.15%
		137	**$1,131.63**	**84.85%**



HANOVER COUNTY ($484.1million)
(Includes Ashland, Mechanicsville)

- Population 111,603
- # of Households 39,226
- Median Income $91,444
- Under age 18.................... 21.70%
- Over age 65...................... 18.40%
- Female 51.00%
- White 83.50%
- Black................................ 9.50%
- Hispanic 3.10%
- Asian................................ 1.90%

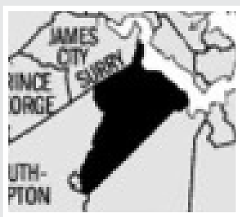
1	Walmart (SC/Neighborhood Mkt)	3	$107.80	22.27%
2	Kroger (Marketplace)	2	$98.80	20.41%
3	Food Lion	6	$73.90	15.27%
4	BJ's Wholesale Club	1	$33.90	7.00%
5	Wawa	4	$33.90	7.00%
6	CVS	6	$32.30	6.67%
7	7-Eleven	8	$18.20	3.76%
8	Target	1	$17.20	3.55%
9	Publix	1	$16.80	3.47%
10	Walgreens	3	$16.10	3.33%
11	Fas-Marts	8	$10.90	2.25%
12	Sheetz	3	$10.10	2.09%
13	Aldi	1	$8.60	1.78%
14	Dash-In	1	$2.00	0.41%
15	Circle K	1	$1.80	0.37%
		49	**$482.30**	**99.63%**



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

- Population 560,158
- # of Households 221,439
- Median Income $61,768
- Under age 18.................... 19.80%
- Over age 65...................... 14.90%
- Female 52.60%
- White 47.20%
- Black................................ 38.90%
- Hispanic 6.70%
- Asian................................ 5.70%

1	Kroger (Marketplace)	9	$285.80	14.50%
2	Walmart (SuperCenter)	7	$283.10	14.37%
3	Food Lion	14	$194.70	9.88%
4	Publix	10	$151.10	7.67%
5	CVS	28	$130.30	6.61%
6	Wawa	12	$125.70	6.38%
7	Walgreens	18	$108.90	5.53%
8	Target	6	$99.70	5.06%
9	7-Eleven	49	$95.60	4.85%
10	Wegmans	1	$66.10	3.35%
11	Costco	1	$48.40	2.46%
12	Whole Foods	2	$44.90	2.28%
13	BJ's Wholesale Club	1	$43.70	2.22%
14	Aldi	6	$43.20	2.19%
15	Sam's Club	1	$41.70	2.12%
16	International Markets	2	$30.30	1.54%
17	Lidl	4	$26.40	1.34%
18	Fresh Market	2	$24.80	1.26%
19	Fas-Marts	16	$23.10	1.17%
20	Trader Joe's	1	$19.00	0.96%
21	Rite Aid	2	$9.50	0.48%
22	Sheetz	2	$8.20	0.42%
23	Save-A-Lot	2	$8.00	0.41%
24	B. Green (Shoppers Value)	1	$7.70	0.39%
25	Great Valu	0	$4.70	0.24%
26	Dash-In	2	$4.60	0.23%
27	Miller Marts	1	$2.20	0.11%
		200	**$1,931.40**	**98.02%**



ISLE OF WIGHT COUNTY ($91.5 million)
(Includes Smithfield)

- Population 39,278
- # of Households 14,611
- Median Income $77,870
- Under age 18.................... 20.80%
- Over age 65...................... 19.80%
- Female 51.00%
- White 70.20%
- Black................................ 23.20%
- Hispanic 3.40%
- Asian................................ 1.00%

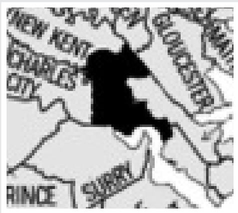
1	Food Lion	3	$35.80	39.13%
2	Kroger	1	$27.80	30.38%

See **VIRGINIA COUNTY SHARE** on page 113

VIRGINIA COUNTY SHARE OF MARKET: 2022

Continued from page 112

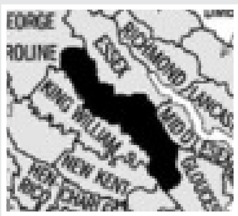
3	CVS	2	$10.70	11.69%
4	Rite Aid	2	$7.90	8.63%
5	Royal Farm Stores	1	$2.80	3.06%
6	7-Eleven	1	$2.40	2.62%
7	Miller Marts	1	$2.00	2.19%
		11	**$89.40**	**97.70%**



JAMES CITY CO. Including WILLIAMSBURG ($426.3 million) (Includes Norge, Toano)

- Population 95,472
- # of Households 34,166
- Median Income $75,482
- Under age 18.................... 15.30%
- Over age 65...................... 21.70%
- Female 52.90%
- White 71.70%
- Black............................... 14.80%
- Hispanic 6.60%
- Asian................................. 4.30%

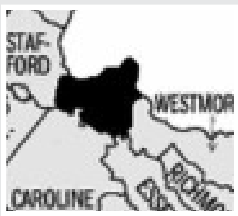
1	Harris Teeter	3	$104.60	24.54%
2	Walmart (SC/Neighborhood Mkt)	2	$74.30	17.43%
3	Food Lion	5	$60.20	14.12%
4	CVS	6	$31.50	7.39%
5	7-Eleven	14	$30.10	7.06%
6	Target	2	$25.80	6.05%
7	Trader Joe's	1	$17.90	4.20%
8	Rite Aid	4	$15.80	3.71%
9	Publix	1	$13.40	3.14%
10	Fresh Market	1	$13.30	3.12%
11	Aldi	1	$8.20	1.92%
12	Walgreens	1	$6.90	1.62%
13	Wawa	1	$6.80	1.60%
14	Fas-Marts	2	$4.60	1.08%
15	Miller Marts	1	$1.90	0.45%
		45	**$415.30**	**97.42%**



KING & QUEEN COUNTY ($5.9 million) (Includes King & Queen Courthouse)

- Population 6,662
- # of Households 2,816
- Median Income $65,385
- Under age 18.................... 17.50%
- Over age 65...................... 23.60%
- Female 49.00%
- White 66.40%
- Black............................... 26.20%
- Hispanic 3.10%
- Asian................................. 0.50%

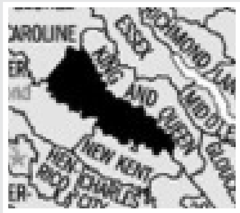
Multi-store retailers do not operate in this county.



KING GEORGE COUNTY ($96.6 million) (Includes King George)

- Population 27,489
- # of Households 9,387
- Median Income $96,711
- Under age 18.................... 24.60%
- Over age 65...................... 13.40%
- Female 49.40%
- White 73.30%
- Black............................... 16.10%
- Hispanic 5.80%
- Asian................................. 1.60%

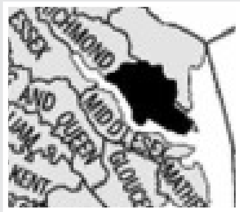
1	Walmart (SuperCenter)	1	$37.20	38.51%
2	Food Lion	2	$26.60	27.54%
3	Sheetz	3	$12.80	13.25%
4	Wawa	1	$5.10	5.28%
5	CVS	1	$4.90	5.07%
6	7-Eleven	2	$3.60	3.73%
7	Fas-Marts	2	$3.40	3.52%
8	Military Commissaries	1	$1.79	1.85%
		13	**$95.39**	**98.75%**



KING WILLIAM COUNTY ($38.8 million) (Includes West Point)

- Population 18,171
- # of Households 6,393
- Median Income $73,284
- Under age 18.................... 22.80%
- Over age 65...................... 16.30%
- Female 51.10%
- White 77.20%
- Black............................... 15.40%
- Hispanic 2.90%
- Asian................................. 1.10%

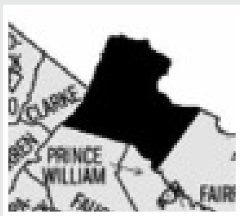
1	Food Lion	2	$30.90	79.64%
2	7-Eleven	2	$4.30	11.08%
3	Fas-Marts	1	$2.20	5.67%
		5	**$37.40**	**96.39%**



LANCASTER COUNTY ($84.3 million) (Includes Kilmarnock)

- Population 10,928
- # of Households 5,287
- Median Income $59,736
- Under age 18.................... 15.50%
- Over age 65...................... 36.70%
- Female 52.70%
- White 67.10%
- Black............................... 28.40%
- Hispanic 2.50%
- Asian................................. 0.80%

1	Walmart (SuperCenter)	1	$38.10	45.20%
2	Great Valu	1	$15.30	18.15%
3	Food Lion	1	$14.80	17.56%
4	Walgreens	1	$5.80	6.88%
5	CVS	1	$3.90	4.63%
6	Fas-Marts	1	$2.20	2.61%
		6	**$80.10**	**95.02%**



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

- Population 427,592
- # of Households 132,565
- Median Income $147,111
- Under age 18.................... 27.90%
- Over age 65........................ 9.70%
- Female 50.40%
- White 54.80%
- Black................................. 8.10%
- Hispanic 13.90%
- Asian............................... 20.30%

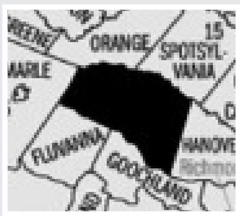
1	Giant Food	9	$249.03	16.21%
2	Harris Teeter	9	$240.50	15.66%
3	Wegmans	2	$186.50	12.14%
4	Costco	2	$163.40	10.64%
5	Walmart (SuperCenter)	3	$122.90	8.00%

See **VIRGINIA COUNTY SHARE** on page 114

VIRGINIA COUNTY SHARE OF MARKET: 2022

Continued from page 113

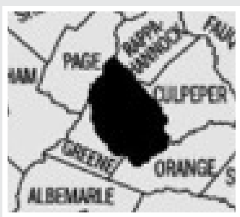
6	International Markets	4	$69.90	4.55%
7	Target	3	$61.70	4.02%
8	CVS	12	$55.40	3.61%
9	Albertsons (Safeway)	4	$53.90	3.51%
10	Walgreens	10	$53.20	3.46%
11	Aldi	4	$40.20	2.62%
12	Food Lion	3	$39.50	2.57%
13	Sam's Club	1	$38.40	2.50%
14	Whole Foods	1	$33.10	2.15%
15	7-Eleven	22	$31.90	2.08%
16	Sheetz	7	$30.10	1.96%
17	Lidl	3	$22.60	1.47%
18	Trader Joe's	1	$19.60	1.28%
19	Wawa	1	$7.00	0.46%
20	Royal Farm Stores	2	$4.60	0.30%
21	Circle K	2	$4.00	0.26%
		105	**$1,527.43**	**99.44%**



LOUISA COUNTY ($49.7 million) (Includes Louisa, Mineral)

- Population 38,848
- # of Households 14,383
- Median Income $67,027
- Under age 18................... 20.10%
- Over age 65..................... 20.30%
- Female 50.50%
- White 78.10%
- Black............................... 15.60%
- Hispanic 3.30%
- Asian................................ 0.60%

1	Food Lion	2	$22.50	45.27%
2	Sheetz	2	$9.30	18.71%
3	CVS	1	$6.00	12.07%
4	Walgreens	1	$5.30	10.66%
5	B. Green (Shoppers Value)	1	$4.95	9.96%
		7	**$48.05**	**96.68%**



MADISON COUNTY ($14.5 million) (Includes Madison)

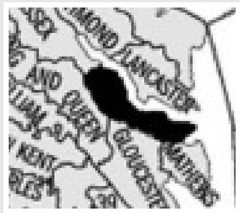
- Population 13,942
- # of Households 5,098
- Median Income $63,482
- Under age 18................... 20.10%
- Over age 65..................... 22.90%
- Female 51.60%
- White 84.30%
- Black................................. 9.30%
- Hispanic 3.20%
- Asian................................ 0.60%

1	Food Lion	1	$14.20	97.93%
		1	**$14.20**	**97.93%**

MATHEWS COUNTY ($14.6 million) (Includes Mathews)

- Population 8,546
- # of Households 3,881
- Median Income $74,489
- Under age 18................... 15.60%
- Over age 65..................... 31.50%
- Female 51.60%
- White 85.70%
- Black................................. 8.50%
- Hispanic 2.70%
- Asian................................ 0.90%

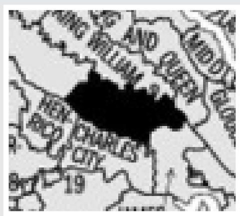
1	Food Lion	1	$14.30	97.95%
		1	**$14.30**	**97.95%**



MIDDLESEX COUNTY ($30.7million) (Includes Urbanna)

- Population 10,781
- # of Households 4,764
- Median Income $57,060
- Under age 18................... 16.00%
- Over age 65..................... 32.00%
- Female 50.90%
- White 77.70%
- Black............................... 16.60%
- Hispanic 2.90%
- Asian................................ 0.50%

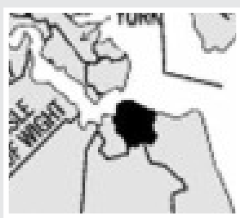
1	Food Lion	1	$14.40	46.91%
2	7-Eleven	3	$7.30	23.78%
3	Great Valu	1	$6.40	20.85%
		5	**$28.10**	**91.53%**



NEW KENT COUNTY ($51.9 million) (Includes New Kent, Providence, Forge)

- Population 23,897
- # of Households 8,117
- Median Income $97,688
- Under age 18................... 19.90%
- Over age 65..................... 17.70%
- Female 49.10%
- White 77.90%
- Black............................... 13.90%
- Hispanic 3.60%
- Asian................................ 1.20%

1	Food Lion	4	$38.90	74.95%
2	Walgreens	2	$10.60	20.42%
3	Fas-Marts	2	$5.40	10.40%
		8	**$54.90**	**105.78%***



NORFOLK CITY ($790.5 million)

- Population 235,089
- # of Households 89,398
- Median Income $53,026
- Under age 18................... 19.40%
- Over age 65..................... 11.60%
- Female 47.90%
- White 43.30%
- Black............................... 42.10%
- Hispanic 8.50%
- Asian................................ 3.80%

1	Walmart (SC/Neighborhood Mkt)	4	$160.70	20.33%
2	Food Lion	8	$134.90	17.07%
3	7-Eleven	53	$120.60	15.26%
4	Harris Teeter	3	$69.90	8.84%
5	Costco	1	$48.30	6.11%
6	CVS	7	$43.70	5.53%

See **VIRGINIA COUNTY SHARE** on page 115

VIRGINIA COUNTY SHARE OF MARKET: 2022

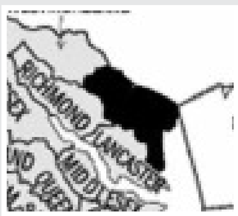
Continued from page 114

7	Wawa	6	$34.60	4.38%
8	Walgreens	5	$31.60	4.00%
9	BJ's Wholesale Club	1	$29.50	3.73%
10	Military Commissaries	1	$24.90	3.15%
11	Rite Aid	6	$19.60	2.48%
12	Fresh Market	1	$16.70	2.11%
13	Target	1	$14.30	1.81%
14	Aldi	2	$13.90	1.76%
15	Lidl	1	$8.50	1.08%
16	Save-A-Lot	1	$5.00	0.63%
17	Miller Marts	2	$4.60	0.58%
18	Royal Farm Stores	1	$3.20	0.40%
		104	**$784.50**	**99.24%**

NORTHAMPTON COUNTY ($40.6 million) (Includes Cape Charles, Exmore)

- Population 12,085
- # of Households 5,151
- Median Income $50,819
- Under age 18.................... 19.70%
- Over age 65...................... 27.00%
- Female 52.10%
- White 54.30%
- Black............................... 33.70%
- Hispanic 9.50%
- Asian................................. 1.00%

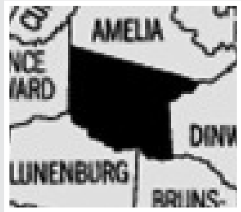
1	Food Lion	2	$22.40	55.17%
2	Fas-Marts	3	$7.10	17.49%
3	Royal Farm Stores	2	$5.80	14.29%
4	Walgreens	1	$4.70	11.58%
		8	**$40.00**	**98.52%**



NORTHUMBERLAND COUNTY ($21.4 million) (Includes Heathsville)

- Population 12,029
- # of Households 5,686
- Median Income $59,437
- Under age 18.................... 14.50%
- Over age 65...................... 37.50%
- Female 51.00%
- White 69.20%
- Black............................... 25.00%
- Hispanic 3.80%
- Asian................................. 0.50%

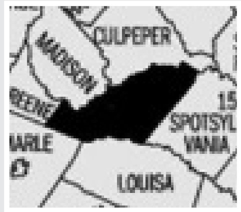
1	Food Lion	1	$14.20	66.36%
2	Walgreens	1	$4.80	22.43%
3	Fas-Marts	1	$2.00	9.35%
		3	**$21.00**	**98.13%**



NOTTOWAY COUNTY $39.5 million) (Includes Crewe, Nottoway)

- Population 15,642
- # of Households 5,568
- Median Income $49,983
- Under age 18.................... 19.40%
- Over age 65...................... 19.30%
- Female 45.90%
- White 54.10%
- Black............................... 39.30%
- Hispanic 4.80%
- Asian................................. 0.60%

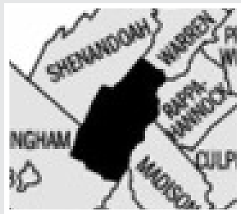
1	Walmart (SuperCenter)	1	$33.60	90.08%
2	Fas-Marts	1	$2.30	6.17%
		2	**$35.90**	**96.25%**



ORANGE COUNTY ($126.6 million) (Includes Gordonsville, Orange)

- Population 37,188
- # of Households 13,926
- Median Income $74,446
- Under age 18.................... 21.00%
- Over age 65...................... 20.60%
- Female 51.10%
- White 77.60%
- Black............................... 13.30%
- Hispanic 5.60%
- Asian................................. 1.10%

1	Walmart (SuperCenter)	2	$66.30	52.37%
2	Food Lion	3	$30.40	24.01%
3	CVS	2	$12.10	9.56%
4	Sheetz	2	$8.60	6.79%
5	7-Eleven	4	$8.50	6.71%
6	Fas-Marts	2	$4.20	3.32%
		15	**$130.10**	**102.76%***



PAGE COUNTY ($73.4 million) (Includes Elgin, Luray)

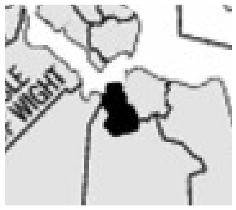
- Population 23,807
- # of Households 9,413
- Median Income $51,878
- Under age 18.................... 19.80%
- Over age 65...................... 21.90%
- Female 50.50%
- White 93.60%
- Black............................... 2.20%
- Hispanic 2.20%
- Asian................................. 0.50%

1	Walmart (SuperCenter)	1	$40.20	54.77%
2	Food Lion	2	$11.80	16.08%
3	7-Eleven	3	$7.40	10.08%
4	B. Green (Shoppers Value)	1	$5.80	7.90%
5	CVS	1	$4.90	6.68%
6	Circle K	1	$2.10	2.86%
		9	**$72.20**	**98.37%**

See VIRGINIA COUNTY SHARE on page 116

VIRGINIA COUNTY SHARE OF MARKET: 2022

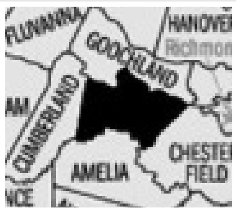
Continued from page 115



PORTSMOUTH CITY ($276.7 million)

- Population 97,840
- # of Households 36,650
- Median Income $53,213
- Under age 18.................... 23.10%
- Over age 65...................... 15.10%
- Female 52.10%
- White 37.20%
- Black............................... 54.50%
- Hispanic 4.70%
- Asian................................. 1.50%

1	Food Lion	5	$73.90	26.71%
2	Kroger (Marketplace)	1	$41.40	14.96%
3	Walmart (SuperCenter)	1	$31.60	11.42%
4	7-Eleven	13	$24.30	8.78%
5	Harris Teeter	1	$24.30	8.78%
6	CVS	3	$15.40	5.57%
7	Wawa	3	$15.00	5.42%
8	Rite Aid	3	$13.10	4.73%
9	Walgreens	2	$12.20	4.41%
10	Military Commissaries	1	$11.43	4.13%
11	Aldi	1	$8.40	3.04%
12	Royal Farm Stores	1	$3.10	1.12%
		35	**$274.13**	**99.07%**



POWHATAN COUNTY ($76.9 million) (Includes Powhatan)

- Population 31,136
- # of Households 10,392
- Median Income $93,833
- Under age 18.................... 18.10%
- Over age 65...................... 19.00%
- Female 48.30%
- White 86.10%
- Black................................ 9.20%
- Hispanic 2.30%
- Asian................................. 0.60%

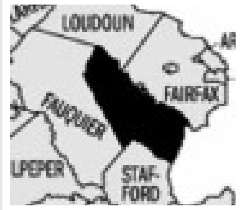
1	Walmart (SuperCenter)	1	$39.10	50.85%
2	Food Lion	2	$24.20	31.47%
3	Sheetz	2	$7.80	10.14%
4	CVS	1	$4.70	6.11%
		6	**$75.80**	**98.57%**

PRINCE GEORGE CO. Including HOPEWELL ($80.2 million) (Includes Prince George)

- Population 66,020
- # of Households 21,125
- Median Income $59,193
- Under age 18.................... 24.00%
- Over age 65...................... 15.10%
- Female 49.80%
- White 49.30%
- Black............................... 38.10%
- Hispanic 8.60%
- Asian................................. 1.90%

1	Food Lion	2	$22.30	27.81%
2	Military Commissaries	1	$21.13	26.35%
3	7-Eleven	2	$5.10	6.36%

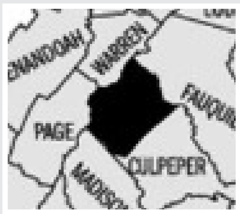
4	Walgreens	1	$4.80	5.99%
5	Rite Aid	2	$4.60	5.74%
6	CVS	1	$4.50	5.61%
7	Save-A-Lot	1	$4.00	4.99%
8	Sheetz	1	$3.50	4.36%
		11	**$69.93**	**87.19%**



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

- Population 544,452
- # of Households 161,821
- Median Income $91,858
- Under age 18.................... 25.40%
- Over age 65........................ 9.90%
- Female 49.50%
- White 37.40%
- Black............................... 17.70%
- Hispanic 34.50%
- Asian................................. 9.10%

1	International Markets	12	$260.10	13.43%
2	Giant Food	8	$218.27	11.27%
3	Wegmans	2	$214.70	11.08%
4	Harris Teeter	4	$133.70	6.90%
5	Food Lion	9	$133.50	6.89%
6	Walmart (SuperCenter)	5	$125.20	6.46%
7	7-Eleven	54	$112.80	5.82%
8	CVS	18	$88.60	4.57%
9	Costco	2	$84.50	4.36%
10	Albertsons (Safeway)	4	$80.60	4.16%
11	BJ's Wholesale Club	2	$64.10	3.31%
12	Target (Super Target)	4	$62.80	3.24%
13	Lidl	5	$60.10	3.10%
14	Walgreens	9	$57.90	2.99%
15	Wawa	6	$57.00	2.94%
16	Sheetz	9	$36.80	1.90%
17	Aldi	6	$36.10	1.86%
18	Military Commissaries	1	$32.89	1.70%
19	Sam's Club	1	$31.80	1.64%
20	Shoppers	1	$30.10	1.55%
21	MOM's Organic Market	1	$13.20	0.68%
22	C&S Independents	1	$1.10	0.06%
		164	**$1,935.86**	**99.93%**



RAPPAHANNOCK COUNTY ($5.2 million) (Includes Washington)

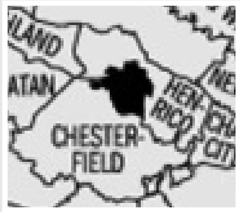
- Population 7,407
- # of Households 2,827
- Median Income $82,077
- Over age 65...................... 16.20%
- Female 27.90%
- White 50.80%
- White 88.30%
- Black................................. 4.20%
- Hispanic 4.40%
- Asian................................. 1.00%

Multi-store retailers do not operate in this county.

See **VIRGINIA COUNTY SHARE** on page 117

VIRGINIA COUNTY SHARE OF MARKET: 2022

Continued from page 116



RICHMOND COUNTY ($22.3 million) (Includes Elevon, Warsaw)

- Population 9,017
- # of Households 2,939
- Median Income $53,298
- Under age 18 .... 16.90%
- Over age 65 .... 21.10%
- Female 43.60%
- White 60.50%
- Black 29.60%
- Hispanic 2.30%
- Asian 0.70%

1	Food Lion	1	$13.90	62.33%
2	Walgreens	1	$4.50	20.18%
3	7-Eleven	1	$2.30	10.31%
		3	**$20.70**	**92.83%**

SHENANDOAH COUNTY ($122.4 million) (Includes Strasburg, Woodstock)

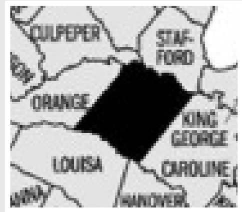
- Population 44,752
- # of Households 17,541
- Median Income $56,114
- Under age 18 .... 21.00%
- Over age 65 .... 22.20%
- Female 50.90%
- White 87.20%
- Black 2.90%
- Hispanic 7.40%
- Asian 1.10%

1	Food Lion	3	$43.20	35.29%
2	Walmart (SuperCenter)	1	$37.40	30.56%
3	Sheetz	2	$9.20	7.52%
4	Walgreens	2	$9.00	7.35%
5	Save-A-Lot	1	$8.10	6.62%
6	7-Eleven	4	$6.60	5.39%
7	CVS	1	$4.00	3.27%
8	Circle K	1	$2.50	2.04%
		15	**$120.00**	**98.04%**

SOUTHAMPTON COUNTY ($93.2 million) (Includes Courtland)

- Population 26,223
- # of Households 36,357
- Median Income $56,423
- Under age 18 .... 22.30%
- Over age 65 .... 20.00%
- Female 51.40%
- White 49.00%
- Black 46.10%
- Hispanic 2.40%
- Asian 1.30%

1	Walmart (SuperCenter)	1	$43.60	46.78%
2	Food Lion	2	$30.60	32.83%
3	7-Eleven	3	$6.40	6.87%
4	Walgreens	1	$5.20	5.58%
5	Rite Aid	1	$3.10	3.33%
6	Circle K	1	$2.40	2.58%
		9	**$91.30**	**97.96%**



SPOTSYLVANIA COUNTY Including FREDERICKSBURG ($822.8 million) (Includes Spotsylvania)

- Population 172,043
- # of Households 56,522
- Median Income $80,221
- Under age 18 .... 22.90%
- Over age 65 .... 13.30%
- Female 52.30%
- White 62.90%
- Black 20.80%
- Hispanic 10.80%
- Asian 3.00%

1	Walmart (SuperCenter)	4	$162.10	19.70%
2	Giant Food	2	$91.58	11.13%
3	CVS	14	$77.80	9.46%
4	Wegmans	1	$72.90	8.86%
5	Wawa	9	$71.80	8.73%
6	Weis Markets	5	$55.20	6.71%
7	Costco	1	$34.40	4.18%
8	Target (Super Target)	2	$33.60	4.08%
9	7-Eleven	17	$31.60	3.84%
10	BJ's Wholesale Club	1	$31.50	3.83%
11	Walgreens	5	$25.30	3.07%
12	Lidl	2	$21.90	2.66%
13	Aldi	3	$17.00	2.07%
14	Sheetz	5	$16.40	1.99%
15	Royal Farm Stores	5	$16.10	1.96%
16	Fas-Marts	11	$15.20	1.85%
17	Publix	1	$14.40	1.75%
18	Food Lion	1	$12.40	1.51%
19	Miller Marts	1	$1.60	0.19%
		90	**$802.78**	**97.57%**

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

- Population 160,877
- # of Households 48,160
- Median Income $112,247
- Under age 18 .... 25.90%
- Over age 65 .... 10.70%
- Female 49.50%
- White 59.30%
- Black 20.00%
- Hispanic 14.20%
- Asian 3.60%

1	Giant Food	3	$117.70	26.88%
2	Walmart (SuperCenter)	2	$67.20	15.35%
3	Wawa	5	$65.80	15.03%
4	Target	2	$37.50	8.56%
5	Weis Markets	3	$36.03	8.23%
6	Shoppers	1	$27.80	6.35%
7	CVS	5	$23.80	5.44%
8	7-Eleven	9	$20.30	4.64%
9	Publix	1	$15.60	3.56%
10	Aldi	1	$8.00	1.83%
11	Sheetz	1	$5.70	1.30%

See VIRGINIA COUNTY SHARE on page 118

VIRGINIA COUNTY SHARE OF MARKET: 2022

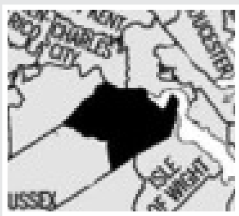
Continued from page 117

12	Fas-Marts	1	$2.30	0.53%
13	Circle K	1	$2.10	0.48%
		35	**$429.83**	**98.16%**

SUFFOLK CITY ($308.9 million)

- Population 96,194
- # of Households 34,603
- Median Income $79,899
- Under age 18.................... 23.80%
- Over age 65...................... 14.90%
- Female 51.40%
- White 48.90%
- Black............................... 42.60%
- Hispanic 4.70%
- Asian................................. 1.90%

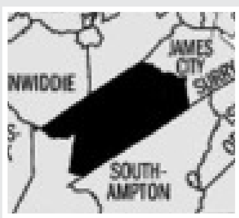
1	Walmart (SuperCenter)	2	$74.00	23.96%
2	Kroger (Marketplace)	2	$72.60	23.50%
3	Food Lion	5	$51.20	16.57%
4	Harris Teeter	1	$27.40	8.87%
5	7-Eleven	9	$18.80	6.09%
6	Walgreens	3	$14.60	4.73%
7	Rite Aid	3	$12.70	4.11%
8	Aldi	1	$11.30	3.66%
9	Lidl	1	$8.30	2.69%
10	CVS	1	$5.10	1.65%
11	Wawa	1	$4.80	1.55%
12	Miller Marts	2	$3.60	1.17%
13	Circle K	2	$2.30	0.74%
		33	**$306.70**	**99.29%**



SURRY COUNTY ($3.9 million)
(Includes Surry)

- Population 6,530
- # of Households.................. 2,794
- Median Income $56,525
- Under age 18.................... 16.60%
- Over age 65...................... 23.90%
- Female 50.40%
- White 53.30%
- Black............................... 41.50%
- Hispanic 2.70%
- Asian................................. 0.50%

1	7-Eleven	1	$2.10	53.85%
		1	**$2.10**	**53.85%**



SUSSEX COUNTY ($8.6 million)
(Includes Sussex, Wakefield)

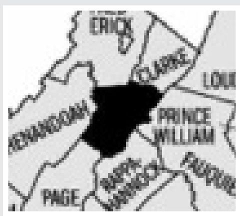
- Population 10,763
- # of Households.................. 3,792
- Median Income $51,701
- Under age 18.................... 15.20%
- Over age 65...................... 18.60%
- Female 40.40%
- White 38.90%
- Black............................... 56.10%
- Hispanic 3.30%
- Asian................................. 0.50%

1	Great Valu	1	$4.90	56.98%
2	7-Eleven	1	$2.80	32.56%
		2	**$7.70**	**89.53%**

VIRGINIA BEACH CITY ($1.7 billion)

- Population 459,470
- # of Households 172,452
- Median Income $78,136
- Under age 18.................... 22.20%
- Over age 65...................... 14.20%
- Female 50.90%
- White 61.10%
- Black............................... 18.80%
- Hispanic 8.40%
- Asian................................. 7.10%

1	Food Lion	21	$257.70	15.20%
2	Walmart (SC/Neighborhood Mkt)	7	$242.50	14.31%
3	Harris Teeter	9	$202.30	11.93%
4	7-Eleven	79	$166.70	9.83%
5	Kroger (Marketplace)	5	$151.10	8.91%
6	Wegmans	1	$69.10	4.08%
7	Walgreens	14	$67.40	3.98%
8	Wawa	9	$62.00	3.66%
9	Target	4	$61.20	3.61%
10	CVS	13	$58.70	3.46%
11	Aldi	6	$48.30	2.85%
12	Rite Aid	16	$46.90	2.77%
13	Sam's Club	1	$43.60	2.57%
14	BJ's Wholesale Club	1	$40.60	2.39%
15	Military Commissaries	1	$36.63	2.16%
16	Whole Foods	1	$34.70	2.05%
17	International Markets	2	$28.50	1.68%
18	Lidl	4	$26.80	1.58%
19	Fresh Market	2	$25.90	1.53%
20	Trader Joe's	1	$19.20	1.13%
21	Miller Marts	3	$5.70	0.34%
22	Royal Farm Stores	1	$3.50	0.21%
23	Circle K	1	$2.10	0.12%
		202	**$1,701.13**	**100.35%***



WARREN COUNTY ($161.4 million)
(Includes Front Royal)

- Population 40,925
- # of Households................. 14,641
- Median Income $70,109
- Under age 18.................... 21.60%
- Over age 65...................... 16.80%
- Female 50.20%
- White 86.00%
- Black................................. 5.00%
- Hispanic 5.30%
- Asian................................. 1.30%

1	The Giant Company (Martin's)	1	$61.57	38.15%
2	Walmart (SuperCenter)	1	$41.90	25.96%
3	Target	1	$17.40	10.78%
4	7-Eleven	8	$13.70	8.49%
5	CVS	2	$7.80	4.83%
6	Aldi	1	$7.60	4.71%
7	Sheetz	1	$5.50	3.41%

See VIRGINIA COUNTY SHARE on page 119

VIRGINIA COUNTY SHARE OF MARKET: 2022

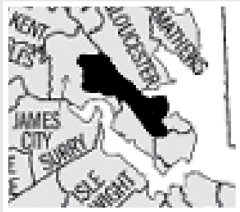
Continued from page 118

8	Royal Farm Stores	1	$2.10	1.30%
9	Circle K	1	$1.70	1.05%
		17	**$159.27**	**98.68%**

WESTMORELAND COUNTY ($51.7 million)
(Includes Colonial Beach)

- Population 18,731
- # of Households 7,910
- Median Income $53,790
- Under age 18.................. 19.10%
- Over age 65..................... 25.60%
- Female 51.20%
- White 63.80%
- Black............................... 26.10%
- Hispanic 6.90%
- Asian................................ 0.90%

1	Food Lion	2	$28.40	54.93%
2	Walgreens	2	$9.10	17.60%
3	Great Valu	1	$6.10	11.80%
4	7-Eleven	2	$4.50	8.70%
5	Fas-Marts	1	$2.20	4.26%
		8	**$50.30**	**97.29%**



YORK COUNTY Including POQUOSON ($182.8 million)
(Includes Yorktown)

- Population 70,915
- # of Households 25,517
- Median Income $93,356
- Under age 18.................. 23.50%
- Over age 65..................... 16.60%
- Female 50.90%
- White 70.10%
- Black............................... 13.80%
- Hispanic 6.90%
- Asian................................ 6.10%

1	Food Lion	4	$48.80	26.70%
2	Kroger	2	$43.30	23.69%
3	Walmart (SuperCenter)	1	$41.10	22.48%
4	Wawa	2	$12.10	6.62%
5	Walgreens	2	$11.60	6.35%
6	Rite Aid	2	$8.00	4.38%
7	7-Eleven	3	$7.80	4.27%
8	CVS	1	$4.60	2.52%
9	Royal Farm Stores	1	$2.90	1.59%
10	Circle K	1	$2.20	1.20%
		19	**$182.40**	**99.78%**

( ) 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 2022

DIRECTORY OF RETAILERS

From page 78

Phone: (610) 358-8000
Web: wawa.com
CEO: Chris Gheysens
Primary Supplier: McLane/Direct
Area Stores: 177
Area Vol.: $1.23 billion

WHOLESALE CLUBS

BJ's Wholesale Club
25 Research Dr.
Westborough, MA 01581
Phone: (774) 512-7400
Web: bjs.com
CEO: Bob Eddy
Area Stores: 29
Area Vol.: $1.06 billion (grocery/HBC only)

Costco
Northeast Div.
45940 Horseshoe Dr., Ste. 150
Sterling, VA 20166
Phone: (703) 406-6800
Web: costco.com
CEO: Craig Jelinek
Pres./COO: Ron Vachris
Northeast Div. SVP/GM: Adam Self
Area Stores: 30
Area Vol.: $1.9 billion (grocery/HBC only)

Sam's Club
2101 SE Simple Savings Dr.
Bentonville, AR 72716
Phone: (501) 273-4000
Web: samsclub.com
CEO/Pres.: Kathryn McLay
Area Stores: 26
Area Vol.: $1.07 billion (grocery/HBC only)

MASS MERCHANDISERS

Target
1000 Nicollet Mall
Minneapolis, MN 55402
Phone: (612) 304-6073
Web: target.com
CEO: Brian Cornell
Area Stores: 111
Area Vol.: $2.05 billion (grocery/HBC only)

Walmart
702 Southwest 8th St.
Bentonville, AR 72716
Phone: (479) 273-4000
Web: walmart.com
CEO: Doug McMillon
Pres/CEO - U.S.: John Furner
Area Stores: 160 (includes SuperCenter/Neighborhood Mkt.)
Area Vol.: $5.72 billion (grocery/HBC only)

IN REVIEW: WALGREENS

State	County	2022 Stores	2022 Sales (in millions)	2022 County Food Sales	% of 2022 County Market	2021 Stores	2021 Sales (in millions)	% of 2021 County Market
DC	Washington	8	$61.30	$2,478.30	2.47%	8	$53.70	2.22%
DC Recap: 8 stores with sales of $61.3 million. Total retail food sales for DC in the study: $2.48 billion. Walgreens share of DC is 2.47%.								
DE	Kent	8	$36.90	$525.60	7.02%	8	$35.30	6.84%
DE	Sussex	14	$77.60	$1,002.10	7.74%	14	$74.10	7.67%
DE Recap: 22 stores with sales of $114.5 million. Total retail food sales for DE in the study: $1.53 billion. Walgreens share of DE is 7.49%.								
MD	Anne Arundel	16	$63.10	$2,327.80	2.71%	16	$60.20	2.65%
MD	Baltimore City	19	$134.80	$1,529.60	8.81%	19	$127.90	8.41%
MD	Baltimore County	27	$164.20	$3,450.20	4.76%	26	$149.50	4.57%
MD	Calvert	2	$11.40	$398.40	2.86%	2	$11.10	2.87%
MD	Caroline	1	$5.70	$85.80	6.64%	1	$5.50	6.69%
MD	Carroll	4	$20.40	$689.10	2.96%	4	$18.90	2.85%
MD	Cecil	3	$13.50	$289.50	4.66%	3	$12.70	4.55%
MD	Charles	3	$15.60	$525.20	2.97%	3	$15.10	2.92%
MD	Dorchester	1	$5.50	$59.50	9.24%	1	$5.20	9.17%
MD	Frederick	5	$27.20	$967.00	2.81%	5	$25.30	2.79%
MD	Harford	11	$56.90	$1,036.90	5.49%	11	$54.00	5.29%
MD	Howard	5	$28.20	$1,203.10	2.34%	5	$26.60	2.26%
MD	Kent	2	$21.60	$102.10	21.16%	2	$20.70	20.76%
MD	Montgomery	13	$74.80	$3,765.80	1.99%	13	$72.30	1.99%
MD	Prince George's	12	$69.50	$3,223.10	2.16%	12	$66.30	2.15%
MD	Queen Anne's	2	$12.60	$158.90	7.93%	2	$12.10	8.85%
MD	St. Mary's	3	$11.90	$391.30	3.04%	3	$14.50	3.66%
MD	Talbot	1	$5.10	$227.80	2.24%	1	$4.80	2.21%
MD	Washington	4	$21.40	$555.10	3.86%	4	$20.20	3.88%
MD	Wicomico	2	$11.50	$299.70	3.84%	2	$10.20	3.65%
MD	Worcester	1	$6.60	$248.70	2.65%	1	$6.10	2.64%
MD Recap: 137 stores with sales of $781.5 million. Total retail food sales for MD in the study: $21.57 billion. Walgreens share of MD is 3.62%.								
PA	Franklin	1	$5.80	$455.60	1.27%	1	$5.40	1.17%
PA	Lancaster	1	$5.50	$1,852.90	0.30%	1	$5.30	0.30%
PA	York	3	$17.10	$1,642.70	1.04%	3	$16.30	1.04%
PA Recap: 5 stores with sales of $28.4 million. Total retail food sales for PA in the study: $6.99 billion. Walgreens share of PA is 0.41%.								
VA	Accomack	1	$5.50	$100.80	5.46%	1	$5.20	5.37%
VA	Albemarle	2	$10.20	$677.40	1.51%	2	$9.70	1.51%
VA	Arlington	5	$34.00	$963.20	3.53%	5	$32.40	3.41%
VA	Caroline	1	$5.00	$33.60	14.88%	1	$4.70	14.51%
VA	Chesapeake City	6	$27.10	$886.30	3.06%	6	$25.60	2.90%
VA	Chesterfield	9	$56.90	$1,500.20	3.79%	10	$60.10	4.16%
VA	Culpeper	2	$12.60	$173.40	7.27%	2	$12.20	7.40%
VA	Dinwiddie	2	$10.90	$134.90	8.08%	2	$10.50	8.01%
VA	Essex	1	$5.20	$66.70	7.80%	1	$5.00	8.09%
VA	Fairfax	22	$129.50	$5,478.40	2.36%	24	$133.20	2.50%
VA	Fauquier	2	$11.10	$188.40	5.89%	2	$10.60	5.99%
VA	Frederick	4	$23.20	$522.40	4.44%	4	$21.80	4.39%
VA	Gloucester	1	$5.40	$128.90	4.19%	1	$5.20	4.25%
VA	Hampton/Newport News	8	$47.40	$1,333.70	3.55%	8	$44.70	3.98%
VA	Hanover	3	$16.10	$484.10	3.33%	3	$15.60	3.38%
VA	Henrico	18	$108.90	$1,970.40	5.53%	20	$115.90	6.08%
VA	James City	1	$6.90	$426.30	1.62%	1	$6.60	1.61%
VA	Lancaster	1	$5.80	$84.30	6.88%	1	$5.50	6.92%

IN REVIEW: WALGREENS

State	County	2022 Stores	2022 Sales (in millions)	2022 County Food Sales	% of 2022 County Market	2021 Stores	2021 Sales (in millions)	% of 2021 County Market
VA	Loudoun	10	$53.20	$1,536.10	3.46%	10	$50.60	3.44%
VA	Louisa	1	$5.30	$49.70	10.66%	1	$5.10	10.60%
VA	New Kent	2	$10.60	$51.90	20.42%	2	$10.10	19.50%
VA	Norfolk City	5	$31.60	$790.50	4.00%	5	$30.70	4.07%
VA	Northampton	1	$4.70	$40.60	11.58%	1	$4.40	11.96%
VA	Northumberland	1	$4.80	$21.40	22.43%	1	$4.50	21.95%
VA	Portsmouth City	2	$12.20	$276.70	4.41%	2	$11.60	4.24%
VA	Prince George	1	$4.80	$80.20	5.99%	1	$4.60	5.42%
VA	Prince William	9	$57.90	$1,937.20	2.99%	9	$55.10	2.97%
VA	Richmond	1	$4.50	$22.30	20.18%	1	$4.30	19.63%
VA	Shenandoah	2	$9.00	$122.40	7.35%	2	$8.70	7.30%
VA	Southampton	1	$5.20	$93.20	5.58%	1	$4.90	5.44%
VA	Spotsylvania	5	$25.30	$822.80	3.07%	5	$23.70	3.09%
VA	Suffolk City	3	$14.60	$308.90	4.73%	3	$13.90	4.58%
VA	Virginia Beach	14	$67.40	$1,695.20	3.98%	14	$64.10	3.87%
VA	Westmoreland	2	$9.10	$51.70	17.60%	2	$8.70	17.43%
VA	York	2	$11.60	$182.80	6.35%	2	$10.70	5.95%

VA Recap: 151 stores with sales of $853.5 million. Total retail food sales for VA in the study: $25.55 billion. Walgreens share of VA is 3.48%.

Mid-Atlantic Recap: 323 stores with sales of $1.84 billion annually. Mid-Atlantic retail food sales total: $57.1 billion.
Walgreens Per Store Average: $5.69 million

Source: *Food World,* June 2022

Classifieds

RATES:
Open Rate: $69.82/inch
3 Consecutive Issues: $67.73/inch
Contract Rates Available.
Call for Details

Devoted to Help Wanted, Positions Wanted, Business Services, etc in the Mid-Atlantic. A service of Best-Met Publishing Company.

Mrs. T's Pierogies
1952 70TH 2022 ANNIVERSARY

Mrs. T's Pierogies is celebrating its 70th year of business in Shenandoah, PA, and is the leading manufacturer of frozen pierogies in the country.

Our mission is simple and fun....to make people SMILE when they hear our name!

We are seeking a NATIONAL ACCOUNT MANAGER to join in that mission. This position will play an important role in developing customer relationships with key national retailers, as well as key accounts in the Pittsburgh area. The National Account Manager will own the relationship with their customers and be responsible for growing sales profitably by executing customer level business plans to achieve sales controllables.

The preferred candidate resides in Pennsylvania and posses broker management, P&L management, and CPG sales experience. They are enthusiastic, share a positive attitude, and SMILE!

Please send letter of intent and resume to Akelley@pierogies.com

Ateeco, Inc. is an equal opportunity employer. All applicants will be considered for employment without attention to race, color, religion, sex, sexual orientation, gender identity, national origin, veteran, or disability status.

F.M. Brown's Sons, Inc.®, a national leader in the pet and wild bird industry, and a 6-generation family owned and operated corporation, is seeking an experienced **National Sales Manager.**

BROWN'S® since 1843

We are looking for someone who has the commitment to become a part of our long-term success story. The preferred candidate resides near our plants in Berks County, PA and is eager to play a key role in developing, building and maintaining profitable customer relationships with key national retailers in multiple market channels. The ideal candidate should possess a passion for selling, be self-driven, and demonstrate experience in budgeting, planning, CPG, P&L. Must be able to maintain relationships with brokers and possess strong teambuilding and management skills. Please visit: www.fmbrown.com.

Please send letter of intent and resume to: cecilcampbell@fmbrown.com

F.M. Browns Sons Inc.® is an equal opportunity employer.