

INSIDE THIS ISSUE



63 Retailers, Vendors Flock To IDDBA In Houston



73 G&S Foods Cuts Ribbon On Hanover, PA Plant

Food World

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Vol. 80 No. 6

MARKET STUDY ISSUE

June 2024

TAKING STOCK

by Jeff Metzger



Uncertain Economy Impacts Most B-W Retailers; Little Optimism For Near-Term Improvement

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

That statement was made in June 2023, and that executive from one of the leading retailers in the B-W market, could not have been more prescient.

Inflation was already slowing, and consumer spending was also tightening even before the federal government cut supplemental SNAP benefits, returning them to pre-COVID levels, in March 2023.

TAKING STOCK continues on page 6

Little Market Share Movement As Giant, Walmart, CVS Remain Leaders

Economic Environment Impacts Most Retailers; Comp Sales Flat

What a difference a year makes! Twelve months ago, retailers, aided by continuing inflation, reached record or near record sales, only to see those gains seemingly reverse themselves in a few short months.

Last year at this time, we reported that food price inflation had jumped 11 percent for the 12-month period from April 1, 2022 to March 31, 2023 and, coming on the heels of booming retail sales as a result of the effects of COVID, most of the 48 merchants reviewed in this study continued to produce strong results.

As inflation began to moderate early last year, retailers felt the sting of lowered consumer spending. Additionally, beginning last March, the federal government ended the supplementary income benefit given to all SNAP (food assistance) qualifiers (a cut of between \$95 and \$250 per month per household) that was implemented during the pandemic. And all retailers remain frustrated by the increasing level of shrink created by shoplifters and organized crime which also adversely affected sales.

The impact of those "hits" generally resulted in identical store store sales being reduced significantly (50-75 percent) with comparable decreases in earnings. Moreover, the fierce competition among retailers in the 89-county

\$61.3 billion Mid-Atlantic market remains diverse and fierce.

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

Giant Food, the market leader since *Food World's* first retail market study was published in 1979, remained atop the leaderboard, amassing estimated sales of \$6.37 billion at its 160 stores. While the Landover, MD brand of Ahold Delhaize USA (ADUSA) continued its dominance of its core Baltimore-Washington market, it was not a great year for the company which was founded in 1936 and acquired by Ahold in 1999. Overall sales were flat and the only new store to open during our

See **MARKET STUDY** on page 98



EARLIER THIS MONTH, UNFI OPENED ITS NEWEST DISTRIBUTION center in Manchester, PA. On hand for the ribbon cutting at the 1.3 million square foot depot were these UNFI executives (l-r) Lauren Hays, Mark Bushway, Jeff Sault and Tim Grenvik.

Rick Manzi To Resume Role As VP-Fresh

Tonya Herring Rejoins Giant Food As SVP/Chief Merchant

Tonya Herring is returning to Giant Food as senior VP-merchandising and chief merchant. She held a similar post for the Landover, MD-based Ahold Delhaize USA brand from 2018 until 2022 when she moved over to sister brand Peapod Digital Labs as senior VP-omnichannel devel-

opment.

Recently, the international retailer combined most of its USA administrative divisions (not its retail store brands) into one structure under the ADUSA um-

See **HERRING** on page 68

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TRADE CALENDAR

June 22-23

The 32nd Annual Giant BBQ Battle will be held in Washington, DC. For more information, or to purchase tickets, go to www.bbqindc.com.

June 23-25

The Summer Fancy Food Show will be held at the Jacob Javits Convention Center in Manhattan. For more information, go to www.sffs.com.

cualityfood.com.

July 23

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

August 1

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

August 6-7

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

August 27-28

C&S will hold its Robesonia winter selling show at the Lancaster, PA convention center.

September 11

Redner's Markets will host its annual golf outing on five golf courses in the Sinking Springs, PA area.

October 5-8

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

October 17-19

The International Fresh Pro-

duce Association's annual show will be held in Atlanta.

November 2

The 40th Annual Children's Cancer Gala is scheduled. More details to come later in the year.

December 10-12

The NY Produce Show & Conference will be held in New York at the Jacob Javits Convention Center.

2025

January 30-February 2

FMI Midwinter will be held at the JW Marriott in Marco Island, FL.

February 18-19

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

February 23-25

The National Grocers Association's annual show will be held at Caesar's Forum Convention Center in Las Vegas.

June 1-3

IDDBA's annual show will be held at the Ernest N. Morial Convention Center in New Orleans.

October 16-18

The IFPA Global Produce & Floral Show will be held at the Anaheim Convention Center in Anaheim, CA.

October 18-21


NFRA will hold its annual conference at World Center Marriott in Orlando.

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 or by scanning the code below.



Imperial's Account Management Team create year-over-year sales growth

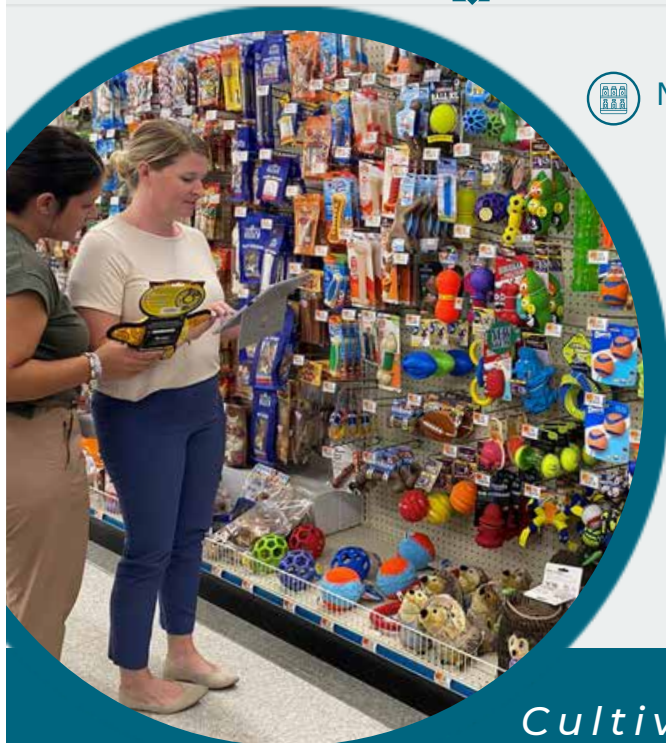
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*Source: Circana Total Mulo+CL52W ending 1.28.24



Terri's Take

By Terri Maloney

Welcome to our 2024 Market Study issue! Phew! Another year passes by and another market study hits the newsstands, so to speak. Happy reading.

We here at Food World haven't done much else over the past month outside of gathering data and creating charts, so I don't have much to report.

Still, we always get news from around the trade about the good work that supermarkets do in the communities they serve, and we have news from both Publix and ShopRite this month. Publix just kicked off its 22nd bi-annual Publix Produce For Kids campaign in partnership with the Healthy Family Project. During the campaign, which wraps up later this month, 12 produce companies are donating 600,000 meals to 35 Feeding America network food banks within Publix's market area. Over the past 22 years, this campaign has raised more than \$4 million to support causes that benefit families and children in Publix communities and helped to provide more than 14 million meals to

local Feeding America area food banks.

Additionally, colorful recipe-centric signs are currently positioned in 1,300 Publix stores (including 20 in the Richmond-Norfolk-Tidewater market) near participating produce vendors with QR codes leading shoppers to a free digital cookbook with recipe inspiration and nutrition tips. In addition, products featured in the campaign are highlighted in weekly ads throughout the campaign.

Produce companies supporting the campaign include Ayco Farms, Bay Foods, CMI Orchards, Coast Tropical, Crunch Pak, Driscoll's, Fresh Express, GT's Living Foods, Sunset, Tomato Thyme, Mucci Farms, Shuman Farms, RealSweet Onions and Wonderful Pistachios. "At Publix, our goal is to make a positive difference in the communities we serve," said **Dwayne Stevens**, director of community relations. "The Healthy Family Project's Produce for Kids campaign fits perfectly with this mission, and we are excited to partner again this year."

"We are incredibly proud of the Publix Produce for Kids campaign and its continued success in promoting healthier eating habits and supporting our communities," said **John Shuman**, founder of Healthy Family Project and president of Shuman Farms. "This initiative not only encourages families to choose fresh, nutritious produce, but also raises essential funds to combat food insecurity. The positive impact we are making together with Publix, our produce partners and our dedicated customers is truly inspiring."

Feeding America estimates that one in five children in the U.S. experience hunger, which means

that this campaign will help a lot of families. Kudos to Publix and the produce companies that partner with them in this endeavor.

ShopRite this year continued its decades-long tradition of supporting women's golf and giving back to community based organizations at the ShopRite LPGA Classic presented by Acer by donating nearly \$1.5 million to food banks, hospitals, education and youth programs and other community champions at its annual charity luncheon held June 7.

The ShopRite LPGA Classic Presented by Acer brought the world's best professional women golfers to Seaview's Bay Course in Galloway, NJ to compete. It has been a tournament tradition to bring together and recognize community champions who fight hunger, help families, and invest in research for the treatment of life altering diseases.

"Our annual luncheon is a cherished tradition within the LPGA, and each year we look forward to honoring the organizations and advocates who contribute so much," said **Karen Meleta**, chief communications officer for Wakefern Food Corp., the logistics and marketing arm of ShopRite stores. "Our ShopRite and Wakefern teams take great pride in our long-standing partnership with the LPGA tour. Over the last three decades, the ShopRite tournament has raised more than \$40 million for charitable causes in the communities where our stores operate."

"ShopRite and Wakefern's support and generosity are vital to the success and impact of the LPGA, especially when it comes to giving back to the community," said **Jeremy Friedman**,

media director for ShopRite LPGA Classic. "We are incredibly proud to have them as our partners and longest standing title sponsor on the LPGA Tour."

We heard from the folks at Goya about a new partnership with Vima Foods. The nation's largest Hispanic-owned company utilize its distribution network to bring Vima Foods' extensive line of premium frozen seafood to grocery stores throughout the Eastern U.S.

"We're proud to help Vima get their products to more shoppers," said **Joseph Perez**, senior VP at Goya. "We know they'll be as impressed with the quality of Vima's products as we are."

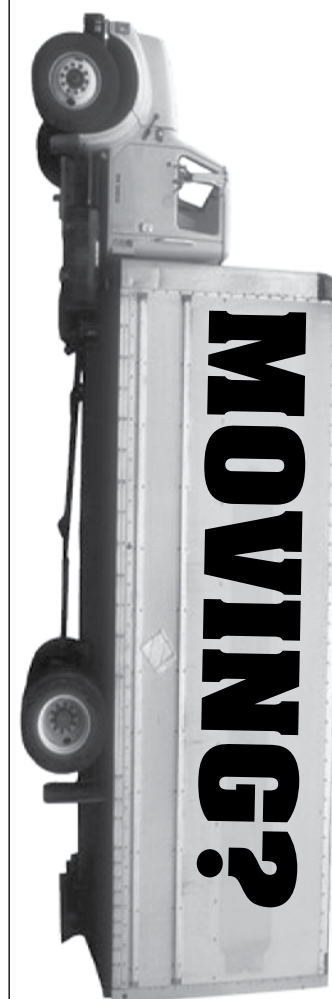
Now, shoppers will have access to Vima Foods' wide variety of products. Packed with Omega-3s for heart health and rich in essential nutrients, Vima's products offer great taste as well as the benefits of a nutritious choice.

Among the products that Vima distributes are tilapia and swai filets, wild pink salmon, tuna steaks, raw and cooked shrimp, Mahi Mahi, squid rings and a seafood mix.

"We're so excited to be able to offer our premium seafood selection to grocers in the U.S.," said **Victor Moro**, Vima's executive vice chairman. "As the leading Latin food brand, Goya shares our passion for high quality products, so they're the perfect partner to help us distribute our products."

Sounds interesting - I'll keep my eyes open for the products when I shop. I'm already thinking about looking for a good cioppino recipe I can make with Vima's fish varieties and the seafood mix....

That's it for me - have a great July 4th weekend!



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TAKING STOCK

from page 1

Over the next 15 months, confidence in the economy, especially when it comes to spending on groceries, hasn't noticeably improved. A trend that began during COVID - the decline of unit sales - has continued, but not even increased private label sales have been able to offset the belt-tightening that's occurred.

A shift in economics often means there's a shift in the retail landscape. In many of the Mid-Atlantic markets we cover, seismic changes occur infrequently because of the dominant market shares the leading retailers have in their respective markets and the cost and availability of real estate in urban areas makes it difficult for upstart and aggressive retailers to add stores and grow their shares of market.

However, when viewed over a five-year span, markets are shifting with drug chains and some conventional retailers being most vulnerable. The gains in that period by relative newcomers such as Aldi, Lidl and Trader Joe's (who are growing their store bases), won't destabilize any market, but their impact is painful for many traditional retailers whose market shares are declining. Old guard retailers like Walmart and Costco, who can more readily affect trading areas, have seemed unphased by the current economic conditions, even if they don't open new stores.

All of these disrupters have one thing in common: a point of difference that resonates with consumers. It might be price (Walmart, Aldi, Lidl) or the continued fascination of a treasure hunt experience (Costco, Trader Joe's, Wegmans), but behind the consumer allure lies a steadfast operating philosophy backed by strong execution.

If I were guessing what this analysis might look like next year, I'd predict the malaise will still be present, the gridlock will remain at paralyzing levels and there may be a few retailers surrendering after they assess their cumulative battlefield casualties.

In the meantime, for the 45th year, here's my annual take on the market leaders in *Food World's* largest trading area, the Baltimore-Washington market.

Giant Food - Not a great year for the perennial market leader. One of

TAKING STOCK continues on page 16



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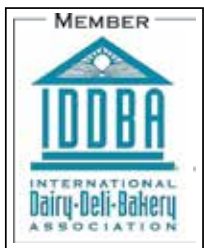
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The Mid-Atlantic Market

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

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

Although food price inflation has mitigated to approximately 3 percent annually, the four-year compounded inflation total has seen food prices increase between 25-30 percent, creating significant headwinds for virtually every retailer measured in the study. Another key sales disrupter was the reduction of SNAP benefits (to pre-COVID levels) from April 1, 2023 through March 31, 2024, the exact measuring period of our annual survey.

The cumulative effect has created the lowest overall county-by-county comparative (vs. 2023) sales increases since 2010.

As occurs every year, there are several counties where collective revenue from those retailers operating stores in those locales exceeded the overall per capita retail food sales for those counties.

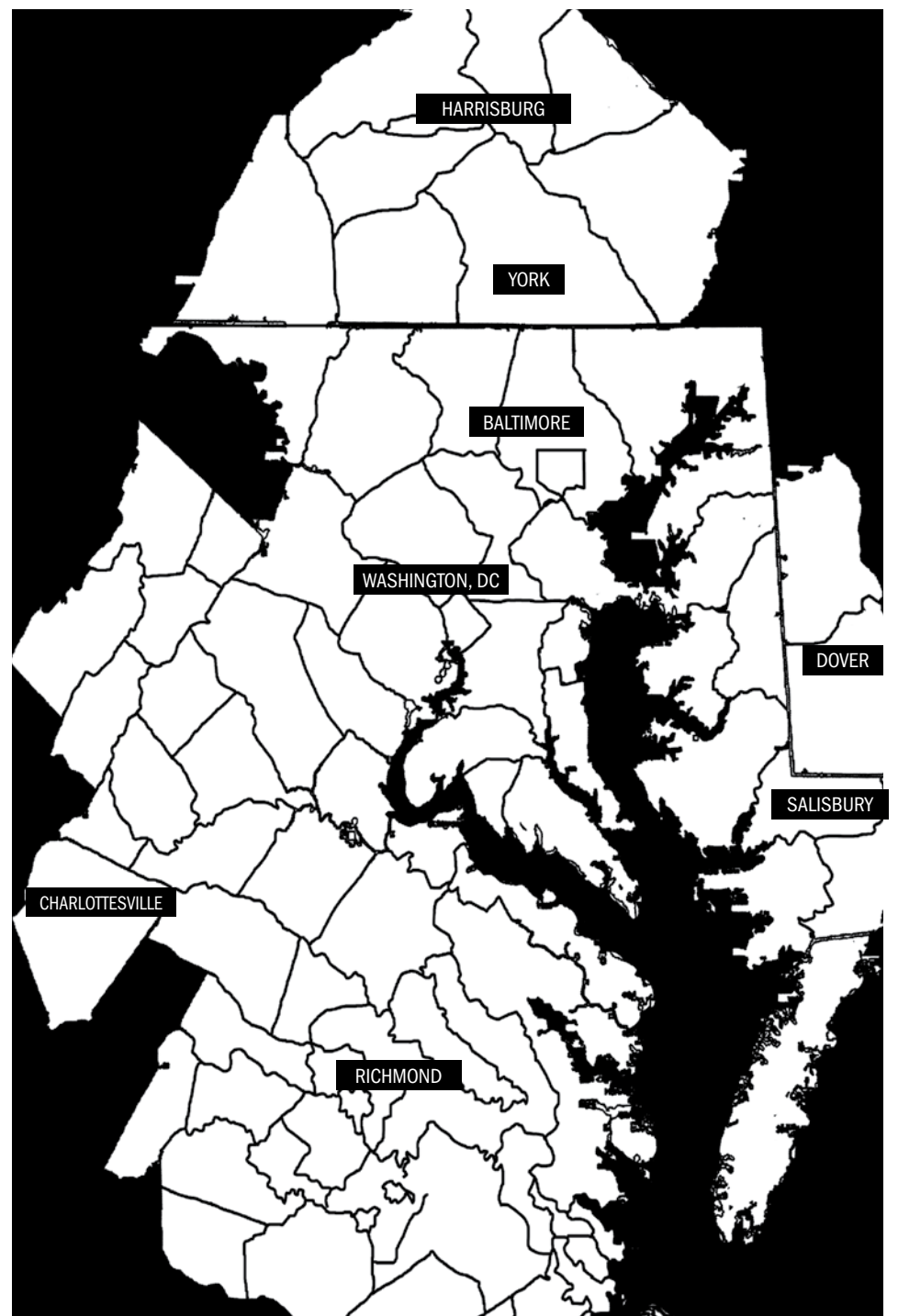
There is an explanation for this: the term is called leakage and simply means that consumers in other counties or cities actually “spill in” and shop in supermarkets, club stores, drug stores, c-stores and units operated by mass merchants in these more densely populated adjacent jurisdictions. Remember,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

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

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

Why are some percentages lower than others?

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



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FOOD WORLD'S LEADING CHAIN STORES: 2024

A corporate chain is defined as any retailer operating more than 17 stores. All companies listed below operate 18 or more supermarkets, convenience stores, drug units or club stores (although not necessarily in this region, as some of the businesses listed below operate other stores outside of the area *Food World* defines as the Mid-Atlantic market). Military commissaries, Kmart, Target and Walmart are listed as well. Sales for club stores, Kmart, Target and Walmart are extrapolated to include comparable supermarket departments - as explained on page 81. Petroleum sales are not included.

Total sales of retail grocery, drugs, HBC, general merchandise and tobacco products in the Mid-Atlantic area are \$61.29 billion.

Rank	Company	Stores	2024 Sales (in millions)	2024 % of Area Market
1	Giant Food	160	\$6,365.90	10.39%
2	Walmart (SuperCenter/Neighborhood Mkt)	158	\$6,332.60	10.33%
3	CVS	612	\$3,697.60	6.03%
4	Food Lion	256	\$3,487.40	5.69%
5	Albertsons (Acme/Balducci's/Safeway)	124	\$3,435.30	5.61%
6	The Giant Co. (Martin's)	63	\$3,024.60	4.94%
7	7-Eleven	1,198	\$2,961.10	4.83%
8	Harris Teeter	78	\$2,521.40	4.11%
9	Wegmans	26	\$2,374.10	3.87%
10	Target (Super Target)	112	\$2,168.40	3.54%
11	International Markets	138	\$2,157.80	3.52%
12	Costco	30	\$2,074.60	3.39%
13	Weis Markets	96	\$2,027.47	3.31%
14	Walgreens	311	\$1,890.20	3.08%
15	Whole Foods (Amazon Fresh)	43	\$1,521.10	2.48%
16	Wawa	191	\$1,502.38	2.45%
17	Kroger (Marketplace)	37	\$1,388.00	2.26%
18	Aldi	149	\$1,337.20	2.18%
19	BJ's Wholesale Club	30	\$1,187.80	1.94%
20	Sam's Club	26	\$1,132.80	1.85%
21	Trader Joe's	33	\$864.40	1.41%
22	Royal Farm Stores	256	\$778.80	1.27%
23	Sheetz	166	\$705.80	1.15%
24	Shoppers	25	\$623.00	1.02%
25	Lidl	61	\$541.00	0.88%
26	Military Commissaries	20	\$540.50	0.88%
27	Rite Aid	123	\$452.10	0.74%
28	ShopRite (Klein's/Village/Price Rite)	13	\$408.20	0.67%
29	Publix	20	\$316.20	0.52%
30	Redner's Markets	14	\$316.00	0.52%
31	MOM's Organic Market	16	\$259.40	0.42%
32	The Fresh Market	16	\$207.90	0.34%
33	Save A Lot	31	\$190.30	0.31%
34	Turkey Hill	112	\$179.10	0.29%
35	Fas-Marts	86	\$161.40	0.26%
36	Rutter's Farm Stores	72	\$160.60	0.26%
37	Sprouts	8	\$150.70	0.25%
38	Grocery Outlet	19	\$117.90	0.19%
39	C&S Independents	84	\$110.88	0.18%
40	Dash-In	44	\$94.00	0.15%
41	High's/Baltimore	52	\$93.90	0.15%
42	Great Valu	7	\$72.00	0.12%
43	IGA	6	\$59.26	0.10%
44	Miller Marts	30	\$58.10	0.09%
45	Giant Eagle (Get Go)	4	\$42.20	0.07%
46	Circle K	18	\$40.80	0.07%
47	ASG	7	\$23.50	0.04%
48	America's Food Basket	1	\$7.70	0.01%
GRAND TOTAL		5,182	\$60,173.30	98.16%

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

Source: *Food World*, June 2024

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Sales Mgrs.-Produce: Ricardo Dimarzio, Joe Lerario
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Pres./CEO: Vivek Sankaran
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Primary Supplier: Direct
FW Stores: 124 (Includes Acme Markets, Balducci's, Safeway)

FW Vol.: \$3.44 billion

Aldi, Inc.

1200 N. Kirk Rd.
Batavia, IL 60510
Phone: (630) 879-8100
Web: aldi.com
CEO: Jason Hart
Primary Supplier: Direct
FW Stores: 149
FW Vol.: \$1.34 billion

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Web: afbasket.com
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COO: Daniel Suriel
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FW Vol.: \$7.7 million

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See **DIRECTORY** on page 14



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FOOD WORLD MARKET STUDY 2024: RULES & ANALYSIS

For those who track the cyclical nature of food retailers, they know the unprecedented sales growth of the past three years would end at some point. If polled, many might have predicted that the slowdown would have begun when the number of COVID cases diminished significantly (beginning about mid-2021) and people resumed their old buying habits to a larger degree. Just when it appeared that the sales momentum would wane, food price inflation continued at a rapid pace.

So, after three years of prices increasing as much as 30 percent, something had to give as many consumers felt that cumulative pinch. Not only was there a significant trading down, but customers were also forced to spend less. Even those in higher economic strata switched to shopping at more value-oriented retailers – Walmart, Aldi, Costco – or began spending more at those discounters.

When you add the fact that in March 2023 the federal government eliminated the supplemental financial benefit of its SNAP food assistance program, which had been increased in 2020, retailers faced another large financial hurdle to clear.

The worst might not be over yet, although retailers have now cycled through the decreased SNAP dollars. Food price inflation, while less of a factor than it was 18 months ago, still remains higher than in any other category that the Bureau of Labor Statistics measures. And while most manufacturers have mitigated the amount and level of price increases, there are still a handful of large CPGs that believe pushing across quarterly (or more frequent) price increases are justified. And why not, profits for some of those companies are at record levels, even if unit sales have been tracking down for a few years.

As we do each year, we try

to highlight those retailers that did an exceptional job over the past 12 months. Simply based on the level of same store sales gains and/or the addition of new stores, it's no surprise that the aforementioned discounters – Aldi, Costco and Walmart as well as c-store chain Wawa – had strong years, especially when compared to their competitors. And each of those retailers has a powerful story to tell that should bode them well in the next few years.

Aldi, which earlier this year completed its acquisition of Jacksonville, FL-based Southeastern Grocers, plans to add 800 stores in the next four years, including significant new store growth in the Northeast. In January, Walmart announced plans to remodel 650 stores in 2024 and add or convert another 150 units over the next few years. At Costco, store expansion in the Mid-Atlantic and Northeast will be limited, but no other retailer performed better during the past four years. Those comp store increases continued during the past year even as all retailers faced fierce headwinds. For Wawa, after a successful entry into Florida that began in 2012 (and now includes nearly 300 stores), the c-store retailer has future stores set to open in new states and it will significantly expand in Alabama, Georgia, Indiana, Kentucky, North Carolina, Ohio and Tennessee.

Of course, there were some losers, too, highlighted by the three national drug chains – Rite Aid (in bankruptcy), Walgreens (continued poor sales and earnings) and CVS. The latter retailer fared better than the other two, mainly because the Woonsocket, RI-based drug merchant/health care company closed fewer stores. With competition as tough as ever, it's time to admit that other than convenience, all three retailers aren't very good merchants.

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

In a market that has seen few traditional store openings over the past five years partly because of the high cost of real estate and scarcity of quality sites, growth in the B-W area essentially stopped as most conventional supermarkets felt the gusts of a challenged economy, retail shrink through theft and more overstocking than ever before. Those that did open stores – Aldi (one unit), Trader Joe's (three), Whole Foods (one) and Wawa (six) also continued to produce some of the best comp store sales in the \$36 billion marketing area. Giant and Safeway continued to dominate, combining for 19.3 percent of the B-W market, but comp store sales were flat. The three large drug chains – all with major presences in the market – closed stores and saw their share of market dip. On the same store sales front, Walmart and Costco were the best producers. Expect more general gridlock in the near future along with a bevy of new stores from niche operators – Aldi, Lidl and Sprouts – in the next couple of years.

Eastern Shore

Not much change in the 12 counties that comprise the Delmarva Peninsula. As in the rest of the Mid-Atlantic, the uncertain economy created difficulties for most retailers in any channel of trade. Faring best among the pack was market leader Walmart, which produced the best comp store sales in the \$3.1 billion region. The Bentonville, AR-based mega-merchant also expanded its lead over second-ranked Food Lion and now controls 17.1 percent of the Eastern's Shore's food and drug business. Most

aggressive among all operators was Aldi, which opened four new discount units and increased its share of market from 3.3 percent to 3.51 percent. At the other end of the spectrum were the three leading drug chains – CVS, Walgreen and Rite Aid. All closed stores and experienced market share decreases.

Central Pennsylvania

A notable trend in this year's survey was overall reduced spending by consumers which also led to minimal growth in overall sales gains when measured on a county or metro market. Central Pennsylvania's eight counties reflected the overall limited spending by producing the lowest sales gains on a regional basis for any market that the Food World annual study analyzes. That said, the market leader remains The Giant Company (TGC) which held serve against all comers and now controls more than 33 percent of the \$7.2 billion region. Weis remained a solid second, but Walmart, with the best comp store sales gains in Central PA, increased its share from 10.76 percent to 11.55 percent. The three market leaders now control 57.9 percent of the market's total food and drug spending. The other story to watch is the fate of Rite Aid, the now-bankrupt drug chain which used to be based in Camp Hill, PA (before a move to Philly a few years ago – great move by some c-suite know-it-alls who are long gone). During the past 12 months, Rite Aid closed 10 stores and saw its market share plummet. Don't expect much change atop the CPA leaderboard for many years and don't expect much market growth, either.

Richmond

Walmart, despite closing a Neighborhood Market on Brook Road last year, widened

its lead against Kroger, in the highly competitive \$4.6 billion market. The world's largest retailer's special sauce was again its low-price image and strong locations in the Richmond market which also saw Food Lion maintain its third-place position in the eight-county region. In fact, the top three retailers combined to command more than 45 percent of all food and drug dollars spent in the market. As far as new store activity, only one retailer in any trade channel added to its store count over the past year – c-store regional chain Sheetz, which opened four new units in the region. For many years, Richmond was one of the prime battlegrounds in the country for store growth and the entry of new players (Publix, Wegmans, Aldi, Trader Joe's, Lidl). However, recently, there's been little new store growth because the market is now overstocked and diverse with many styles of retailing. That said, Walmart remains the leader and is primed to build on its number one position in the years ahead.

Tidewater

Another highly competitive market where military commissaries also play a role in the region's makeup. While Walmart keeps adding share, market leader Food Lion more than held its own. The two large chains combined to capture 35 percent of the \$6.5 billion marketing area. With 283 locations in a territory that stretches from Williamsburg to Virginia Beach, c-store giant 7-Eleven saw its share increase slightly to 10.5 percent. For most of the other merchants doing business in Hampton Roads, it was survival time in an overall challenging environment where consumers tightened their belts and focused on price. The biggest decliner in the 11-county/city area was

See **RULES & ANALYSIS** on page 81

DIRECTORY OF RETAILERS

From page 12

Port Washington, NY 11050
 Phone: (516) 256-3100
 Web: asghq.com
 Co-CEO/Co-Pres.: Joe Garcia
 Co-CEO/Co-Pres: Zulema Wiscovitch
 CFO: Pema Tshering
 General Counsel: Erin Tregarthen
 SVP-Bus. Dev.: Ken Scher
 EVP-Operations: Jonathan D'Onofrio
 VP-Sales: Francisco Nieves
 VP-Marketing & CX: Michelle Mendoza
 VP-IT: Ladwina Isaac
 VP-Retail Tech.: Magdalena Desimone
 Primary Supplier: C&S Wholesale Grocers
 FW Stores: 7
 FW Vol.: \$23.5 million
 *This is the advertising and marketing arm that serves a group of independent retailers including such banners as Associated, Met and Pioneer.

B. Green & Co., Inc.
 1300 S. Monroe St.
 Baltimore, MD 21230
 Phone: (410) 539-6134
 Web: bgreenco.com
 Chmn.: Benjamin Green
 CEO: Rick Rodgers
 Primary Supplier: UNFI
 FW Stores: 6 (Includes Food Depot/
 Green Valley Market)
 FW Vol.: \$143.9 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
 Dir.-HR: Ann Marie Blashock
 Ops. Mgr.: Kevin Kerschner
 Meat Merch.: Joseph Cutrona
 Produce Merch.: Michael Bush
 Deli/Bakery/Seafood Merch.: Mellisa Erickson
 Non-Perishable Merch.: Jeff O'Neill
 Primary Supplier: UNFI

FW Stores: 1
 FW Vol.: \$10.56 million

C&S Independents
 336 East Penn Ave.
 Robeson, PA 19551
 Phone: (610) 693-3161
 Web: cswg.com
 FW Stores: 84
 FW Vol.: \$110.88 million
 *C&S Independents are comprised of the independent supermarkets serviced by C&S from its Robeson, PA headquarters.

Eddie's of Roland Park
 5125 Roland Ave.
 Baltimore, MD 21210
 Phone: (410) 323-3656
 Web: eddieofrolandpark.com
 Co-owners: Nancy Cohen,
 Michael Schaffer
 Primary Supplier: Bozzuto's
 FW Stores: 2
 FW Vol.: \$39.3 million

Family Owned Markets
 951 Rotherstown Rd., Unit 201
 Lancaster, PA 17601
 Phone: (717) 874-5152
 Web: familyownedmarkets.com
 Dir.-Marketing: Kevin Hanus
 Primary Supplier: MDI
 FW Stores: 7
 FW Vol.: \$127.67 million
 *This is the advertising and marketing arm that serves a group of independent retailers, including Martin's Country Market, Oregon Dairy, John Herr's Village Market, Saubel's and Yoder's Country Market.

Food Lion
 Div. of Ahold Delhaize USA
 2110 Executive Dr.
 P.O. Box 1330
 Salisbury, NC 28145
 Phone: (704) 633-8250
 Web: foodlion.com
 Pres: Meg Ham
 Primary Supplier: Direct
 FW Stores: 256
 FW Vol.: \$3.49 billion

See **DIRECTORY** on page 66



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TAKING STOCK

from page 6

several conventional supermarket leaders in the region to be affected by competition from discounters and the overall economic slowdown. Other challenges included labor staffing/turnover and the continued impact of retail shrink from shoplifting and organized crime. More recently, Giant also felt the effects of declining service levels in its frozen department due to technical problems at the company's new temperature-controlled depot in Mountville, PA (which is being operated by Americold). It all added up to a generally flat performance. However, the company's leadership, under the steady and popular Ira Kress, and its stellar store locations, reinforce the reality that its leadership position in the \$36 billion trading area is not threatened.

Safeway - Much like Giant (but with higher retails), Safeway was impacted by tightened consumer spending and the related market shift towards discount merchants. Additionally, other than a major remodel of its great Georgetown store in DC, the company once again opened no net new stores and faces significant cap-ex challenges as it attempts to modernize its store based which is aging, but with many excellent locations. Some of its 114 stores in the market might have to be sold if the company's (Albertsons) merger attempt with Kroger is approved (a saga that has now dragged out for 21 months). Even if it's not, the outcome of that proposed deal will be the most influential factor in the company's history. It's already a distraction that is clearly affecting some of Safeway's (Albertsons) corporate strategic decisions (or lack of them). If the Kroger deal ultimately fails, Albertsons would be hard-pressed to recreate the energy that it once had.

Walmart - Fearless and undaunted. Walmart's continuing gains in the market (and nationally) have more to do than just offering lower prices. Its ability to constructively apply technology, both in distribution and in its growing digital business, has only added to Walmart's efficiency and potential for growth. Walmart was one of many retailers in the B-W market which did not open a new store over the past 12 months (in fact, it closed a store on H St. NW in the District). During the past year, no major remodels were completed, either. However, it didn't seem to matter as the "Behemoth" rang up some of the best comp stores in the entire Mid-Atlantic and nationally. Moreover, with 650 remodels slated for this year and 150 new stores planned for the next four years (some of which will undoubtedly be in B-W), Walmart could leap over Safeway as the region's second largest player.

Harris Teeter - Another less than stellar year for the upscale Kroger brand. After seemingly opening new stores every year since its B-W market debut in 1999 (it now has 49 stores in the market), the last two years have seen a marked slowdown (the only new supermarket to open over the past 12 months is a replacement store for its first DC-area unit in the Ballston section of Arlington, VA). Never an aggressive price merchant, HT's calling card was always its fresh and specialty departments, its strong operational execution and excellent customer service. Those assets still grade out well, just not as well as in previous years. Like Safeway, the Teeter's store base may be trimmed if Kroger's merger with Albertsons is approved by the FTC.

Wegmans - A very solid year for the Rochester, NY-based uber-merchant despite an economy that might make one think that the family-owned retailer might be vulnerable. It, too, did not open any new stores over the past 12 months (although a new unit will debut next year in Rockville, MD). However, comps were solid, and Wegmans seemed to overcome some of the labor staffing, retention and morale issues that other retailers are facing. A hidden part of Wegmans success is its site planning and demographics research. While all economic strata have been impacted by uncertain economic conditions, the company's great store locations (in addition to size, selection overall product mix and execution) have protected it against major slumps. When you're averaging more than \$90 million per store in sales annually, you are doing a lot of things right.

TAKING STOCK continues on page 43

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Let's Talk



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Giant Food Celebrates Grand Reopening Of Expanded, Remodeled Wilkens Avenue Store In Baltimore



After months of work to upgrade and expand (by 10,000 square foot) its Wilkens Avenue store, Giant Food cut the ribbon on the remodeled unit June 7. On hand for the festivities were (l-r) Tonya Herring, president Ira Kress, Diane Hicks and store manager Thuan Trinh, all with Giant Food.



At the seafood department we found (l-r) Bill Campbell and Ryan Coyle of Giant Food and Joe Rallo of Sales Force One.



All smiles at the remodeled and expanded store are Tyrena Brown (l) and James Lash, both with Giant Food.



In the produce section were Giant veterans Rick Manzi (l) and Josh Hardester.



Tony Minadakis (l) of Jimmy's Famous Seafood and Ira Kress (r) of Giant Food flank Brenda Jackson from the *Baltimore Sun*.



Giant's "Mr. Everything" Gary Budd (l) welcomes Jeff Sabotta (c) and Don Craft, both with Schmidt Baking.

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Washington Supermarket Leaders

- Giant Sales Flat, Share Is 28.9%
- Albertsons Market Share Steady
- Wegmans' Per-Store Avg. Strong
- Trader Joe's Opens 3 Stores
- Whole Foods Opens New DC Unit

Rank	Company	2024 Stores	2024 Sales (in millions)	% of 2024 Market	2023 Stores	2023 Sales (in millions)	% of 2023 Market
1	Giant Food	113	\$4,252.20	28.92%	114	\$4,264.80	29.46%
2	Albertsons (Balducci's/Safeway)	87	\$2,361.70	16.06%	87	\$2,309.50	15.95%
3	International Markets	107	\$1,743.70	11.86%	106	\$1,712.00	11.82%
4	Harris Teeter	43	\$1,519.10	10.33%	43	\$1,525.30	10.54%
5	Wegmans	15	\$1,484.20	10.10%	15	\$1,484.80	10.26%
6	Whole Foods (Amazon Fresh)	32	\$1,130.70	7.69%	31	\$1,084.10	7.49%
7	Trader Joe's	22	\$631.40	4.29%	19	\$560.40	3.87%
8	Aldi	55	\$540.40	3.68%	54	\$511.90	3.54%
9	Food Lion	32	\$456.70	3.11%	32	\$452.80	3.13%
10	Shoppers	15	\$409.40	2.78%	14	\$401.60	2.77%
		521	\$14,529.50	98.83%	515	\$14,307.20	98.82%

This chart lists the top 10 supermarket retailers in the Washington market. Counties/cities included are: Washington, DC; Calvert, Charles, Frederick, Montgomery and Prince George's in MD; Arlington, Clarke, Culpeper, Fairfax, Fauquier, King George, Loudoun, Prince William, Spotsylvania, Stafford and Warren and the independent cities of Alexandria, Fairfax, Falls Church and Fredericksburg in VA. Petroleum sales are not included. () Indicates another banner used by the company. **Total supermarket sales for the area are \$14.7 billion.**

Source: Food World, June 2024

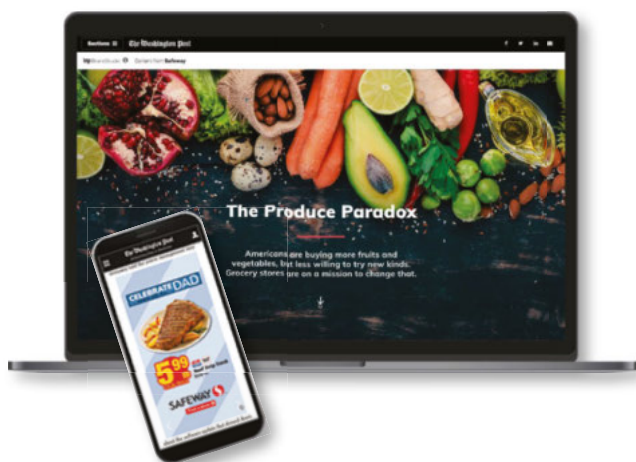
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Source: Nielsen Scarborough 2022, Release 1

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Washington Market Leaders

- Alt. Channels Share Up To 32.5%
- Giant Still Dominant In \$25B Area
- Drug Chains Close Units, Share Dips
- Target, Walmart Control 9.9%
- Wawa Opens 5 C -Stores

Rank	Company	2024 Stores	2024 Sales (in millions)	% of 2024 Market	2023 Stores	2023 Sales (in millions)	% of 2023 Market
1	Giant Food	113	\$4,252.20	17.01%	114	\$4,264.80	17.45%
2	Albertsons (Balducci's/Safeway)	87	\$2,361.70	9.45%	87	\$2,309.50	9.45%
3	International Markets	107	\$1,743.70	6.97%	106	\$1,712.00	7.00%
4	CVS	247	\$1,588.20	6.35%	256	\$1,621.30	6.63%
5	Harris Teeter	43	\$1,519.10	6.08%	43	\$1,525.30	6.24%
6	Wegmans	15	\$1,484.20	5.94%	15	\$1,484.80	6.07%
7	Walmart (SuperCenter)	39	\$1,435.80	5.74%	40	\$1,387.00	5.67%
8	7-Eleven	542	\$1,359.20	5.44%	536	\$1,294.30	5.30%
9	Costco	17	\$1,345.80	5.38%	17	\$1,312.50	5.37%
10	Whole Foods (Amazon Fresh)	32	\$1,130.70	4.52%	31	\$1,084.10	4.44%
11	Target (Super Target)	48	\$1,049.90	4.20%	50	\$1,090.90	4.46%
12	Trader Joe's	22	\$631.40	2.53%	19	\$560.40	2.29%
13	Walgreens	94	\$601.80	2.41%	96	\$608.90	2.49%
14	Aldi	55	\$540.40	2.16%	54	\$511.90	2.09%
15	Food Lion	32	\$456.70	1.83%	32	\$452.80	1.85%
16	Shoppers	15	\$409.40	1.64%	14	\$401.60	1.64%
17	Weis Markets	24	\$390.71	1.56%	24	\$379.46	1.55%
18	BJ's Wholesale Club	9	\$367.80	1.47%	9	\$363.80	1.49%
19	Wawa	55	\$364.66	1.46%	50	\$308.64	1.26%
20	Lidl	33	\$310.60	1.24%	29	\$271.20	1.11%
		1,629	\$23,343.97	93.36%	1,622	\$22,945.20	93.21%

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 81. 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 \$25.0 billion.** Source: Food World, June 2024

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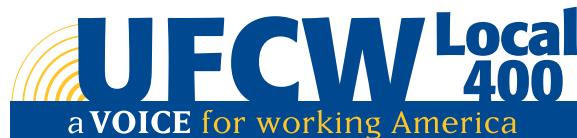


The hardworking members of UFCW Local 400 working at Kroger in the Richmond-Tidewater area and at Shoppers in the DMV have more than earned strong new collective bargaining agreements providing real raises that overcome inflation, better schedules with hours we can live on, secure health care we can count on, and safe workplaces.

Over the past seven months, Local 400 members working at Giant Food, Safeway and Kroger West Virginia won new contracts that are lifting up their standard of living, strengthening their security, and improving their workplace conditions. Their sisters and brothers at Shoppers and Kroger Richmond-Tidewater deserve the same.

It is our members' hard work and dedication that build customer loyalty, expand market share, and earn our employers their profits. Our members are their employers' most valuable assets. It is time for them to be treated as such.

Mark P. Federici
President



Christopher Hoffmann
Secretary-Treasurer

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Baltimore Supermarket Leaders

- Giant Remains King Of Supers
- Safeway Up Marginally
- Weis Sales, Share Increase
- Wegmans Per-Store Vol. At \$95M
- Supers Lose Traction To Alts.

Rank	Company	2024 Stores	2024 Sales (in millions)	% of 2024 Market	2023 Stores	2023 Sales (in millions)	% of 2023 Market
1	Giant Food	41	\$1,820.30	34.11%	41	\$1,814.00	34.20%
2	Albertsons (Acme/Safeway)	27	\$800.90	15.01%	27	\$784.20	14.78%
3	Weis Markets	25	\$550.51	10.31%	25	\$534.63	10.08%
4	Wegmans	5	\$473.90	8.88%	5	\$471.20	8.88%
5	ShopRite (Klein's/Village/PR)	10	\$362.40	6.79%	11	\$377.22	7.11%
6	International Markets	20	\$290.70	5.45%	20	\$289.10	5.45%
7	Harris Teeter	6	\$247.30	4.63%	6	\$246.50	4.65%
8	Food Lion	20	\$239.90	4.49%	20	\$239.60	4.52%
9	Aldi	29	\$227.50	4.13%	29	\$220.00	4.13%
10	Whole Foods	5	\$196.20	3.68%	5	\$195.40	3.68%
		188	\$5,209.61	97.48%	189	\$5,174.85	97.56%

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 \$5.34 billion.**

Source: Food World, June 2024

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*According to a recent Department of Labor study. See "Union Members – "Union Members – 2023," news release USDL-24-0096 (U.S. Dept. of Labor Statistics, January 23, 2024)

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Each week, *Baltimore Sun Media* delivers 837,600 grocery shoppers, including 217,460 millennials.

Weekly *Baltimore Sun Media* also delivers 599,520 adults who use coupons for groceries, including 150,660 millennials. In fact, weekly BSM readers use coupons for groceries 11% more (index 111) than the average Baltimore DMA adults.

Base: 2,348,372 Baltimore DMA adults who shopped at any grocery store in the past week;
1,494,487 Baltimore DMA adults who use coupons for groceries; 639,180 DMA millennials.
Source: Nielsen Scarborough 2024 R1.

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Baltimore Market Leaders

- Alternates Share Is 36.2%
- Giant Leads Among All Comers
- WM Grows, Target Slumps
- R. Farms, 7-Eleven, Wawa Grow
- Drug Chains Keep Closing

Rank	Company	2024 Stores	2024 Sales (in millions)	% of 2024 Market	2023 Stores	2023 Sales (in millions)	% of 2023 Market
1	Giant Food	41	\$1,820.30	16.50%	41	\$1,814.00	16.54%
2	Walmart (SuperCenter)	22	\$862.00	7.82%	22	\$829.50	7.56%
3	Albertsons (Acme/Safeway)	27	\$800.90	7.26%	27	\$784.20	7.15%
4	Weis Markets	25	\$550.51	4.99%	25	\$534.63	4.87%
5	Walgreens	82	\$492.70	4.47%	84	\$501.90	4.58%
6	CVS	84	\$479.90	4.35%	88	\$496.00	4.52%
7	Wegmans	5	\$473.90	4.30%	5	\$471.20	4.30%
8	7-Eleven	179	\$417.20	3.78%	177	\$400.60	3.65%
9	Royal Farm Stores	137	\$402.40	3.65%	133	\$377.90	3.44%
10	Target	19	\$379.20	3.44%	19	\$383.70	3.50%
11	ShopRite (Klein's/Village/PR)	10	\$362.40	3.29%	11	\$377.22	3.44%
12	Costco	5	\$331.70	3.01%	5	\$326.30	2.97%
13	Sam's Club	6	\$328.00	2.97%	6	\$321.80	2.93%
14	BJ's Wholesale Club	7	\$294.60	2.67%	7	\$290.60	2.65%
15	International Markets	20	\$290.70	2.64%	20	\$289.10	2.64%
16	Harris Teeter	6	\$247.30	2.24%	6	\$246.50	2.25%
17	Food Lion	20	\$239.90	2.18%	20	\$239.60	2.18%
18	Wawa	32	\$237.82	2.16%	31	\$218.14	1.99%
19	Aldi	29	\$227.50	2.06%	29	\$220.00	2.03%
20	Whole Foods	5	\$196.20	1.78%	5	\$195.40	1.78%
		761	\$9,435.13	83.54%	761	\$9,321.29	84.97%

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 81. Petroleum sales are not included. Counties/cities included are: Anne Arundel, Baltimore City, Baltimore, Carroll, Harford, Howard and Queen Anne's. () Indicates another banner used by the company. **Total food sales for the area are \$11.03 billion.** Source: Food World, June 2024

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FOOD WORLD'S LEADING INDEPENDENTS: 2024

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

Rank	Company	2024 Supermarkets	2024 (in millions)	2023 Supermarkets	2023 (in millions)	Headquarters	Primary Supplier
1	Karns Prime & Fancy Foods	10	\$186.00	10	\$188.00	Mechanicsburg, PA	UNFI
2	B. Green (Food Depot/Green Valley)	6	\$143.90	7	\$167.75	Baltimore, MD	UNFI
3	Family Owned Markets	7	\$127.67	8	\$146.61	Millersville, PA	MDI
4	Streets Market (Snider's)	11	\$94.50	11	\$96.70	Washington, DC	Bozzuto's
5	Graul's	6	\$68.20	6	\$68.00	Baltimore, MD	UNFI
6	Sharp Shopper	4	\$54.40	4	\$53.70	Ephrata, PA	Direct
7	Eddie's of Roland Park	2	\$39.30	2	\$38.70	Baltimore, MD	Bozzuto's
8	Geresbeck's Food Market	3	\$35.40	3	\$35.60	Baltimore, MD	C&S
9	Roots Markets	2	\$24.10	2	\$24.00	Clarksville, MD	UNFI
10	Boyer's Markets	1	\$10.56	1	\$11.34	Orwigsburg, PA	UNFI
GRAND TOTAL		52	\$786.53	54	\$831.70		

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

Source: *Food World*, June 2024



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IN REVIEW: WALMART

State	County	2024 Stores	2024 Sales (in millions)	2024 County Food Sales	% of 2024 County Market	2023 Stores	2023 Sales (in millions)	% of 2023 County Market
DC	Washington (SuperCenter)	2	\$52.30	\$2,662.40	1.96%	3	\$70.90	2.71%
DC Recap: 2 stores with sales of \$52.3 million. Total retail food sales for DC in the study: \$2.66 billion. Walmart share of DC is 1.96%.								
DE	Kent (SuperCenter)	2	\$69.50	\$561.70	12.37%	2	\$66.20	11.81%
DE	Sussex (SuperCenter)	4	\$144.20	\$1,078.20	13.37%	4	\$143.40	13.30%
DE Recap: 6 stores with sales of \$213.7 million. Total retail food sales for DE in the study: \$1.64 billion. Walmart share of DE is 13.03%.								
MD	Anne Arundel (SuperCenter)	4	\$171.50	\$2,471.20	6.94%	4	\$164.30	6.59%
MD	Baltimore County (SuperCenter)	9	\$379.60	\$3,673.10	10.33%	9	\$367.50	10.13%
MD	Calvert (SuperCenter)	2	\$67.80	\$434.50	15.60%	2	\$64.90	15.34%
MD	Caroline (SuperCenter)	1	\$45.10	\$104.40	43.20%	1	\$43.20	42.90%
MD	Carroll (SuperCenter)	4	\$128.20	\$747.90	17.14%	4	\$121.50	16.87%
MD	Cecil (SuperCenter)	2	\$64.70	\$322.80	20.04%	2	\$61.40	19.36%
MD	Charles (SuperCenter)	2	\$82.30	\$624.80	13.17%	2	\$78.70	13.93%
MD	Dorchester (SuperCenter)	1	\$30.30	\$71.60	42.32%	1	\$28.20	43.65%
MD	Frederick (SuperCenter)	2	\$124.70	\$1,040.10	11.99%	2	\$118.60	11.68%
MD	Harford (SuperCenter)	3	\$102.40	\$1,127.10	9.09%	3	\$98.70	8.86%
MD	Howard (SuperCenter)	2	\$80.30	\$1,285.80	6.25%	2	\$77.50	6.10%
MD	Montgomery (SuperCenter)	1	\$42.80	\$4,010.20	1.07%	1	\$40.00	1.01%
MD	Prince George's (SuperCenter)	4	\$95.10	\$3,586.60	2.65%	4	\$88.60	2.59%
MD	St. Mary's (SuperCenter)	1	\$64.20	\$406.20	15.81%	1	\$60.20	16.04%
MD	Talbot	1	\$25.30	\$245.70	10.30%	1	\$24.10	9.89%
MD	Washington (SuperCenter)	2	\$126.80	\$579.60	21.88%	2	\$119.50	20.78%
MD	Wicomico (SuperCenter)	2	\$84.50	\$317.40	26.62%	2	\$79.20	24.86%
MD	Worcester (SuperCenter)	2	\$86.70	\$254.70	34.04%	2	\$81.10	33.57%
MD Recap: 45 stores with sales of \$1.8 billion. Total retail food sales for MD in the study: \$23.18 billion. Walmart share of MD is 7.78%.								
PA	Adams (SuperCenter)	1	\$25.10	\$233.20	10.76%	1	\$23.40	10.66%
PA	Cumberland (SuperCenter)	4	\$131.80	\$1,249.60	10.55%	4	\$125.70	10.03%
PA	Dauphin (SuperCenter)	2	\$89.20	\$1,103.00	8.09%	2	\$84.80	7.68%
PA	Franklin (SuperCenter)	2	\$91.70	\$468.80	19.56%	2	\$86.10	17.93%
PA	Lancaster (SuperCenter)	3	\$152.60	\$1,809.20	8.43%	3	\$145.40	7.69%
PA	Lebanon (SuperCenter)	2	\$96.40	\$461.30	20.90%	2	\$91.30	18.72%
PA	York (SuperCenter)	6	\$241.70	\$1,725.40	14.01%	6	\$229.70	13.26%
PA Recap: 20 stores with sales of \$828.5 million. Total retail food sales for PA in the study: \$7.17 billion. Walmart share of PA is 11.55%.								
VA	Accomack (SuperCenter)	1	\$42.20	\$104.50	40.38%	1	\$39.80	39.10%
VA	Albemarle (SuperCenter)	1	\$42.80	\$716.10	5.98%	1	\$40.50	5.79%
VA	Chesapeake City (SuperCenter)	6	\$186.20	\$983.60	18.93%	6	\$175.40	18.51%
VA	Chesterfield (SuperCenter)	6	\$261.30	\$1,710.90	15.27%	6	\$247.80	14.68%
VA	Culpeper (SuperCenter)	1	\$36.80	\$187.40	19.64%	1	\$34.70	18.90%
VA	Dinwiddie (SuperCenter)	1	\$49.40	\$141.70	34.86%	1	\$46.20	32.22%
VA	Essex (SuperCenter)	1	\$47.30	\$73.80	64.09%	1	\$44.90	63.78%
VA	Fairfax (SuperCenter)	8	\$271.50	\$6,114.10	4.44%	8	\$259.30	4.32%
VA	Fauquier (SuperCenter)	1	\$41.40	\$196.80	21.04%	1	\$39.60	20.84%
VA	Frederick (SuperCenter)	3	\$170.60	\$561.90	30.36%	3	\$161.20	29.60%
VA	Gloucester (SuperCenter)	1	\$41.70	\$139.70	29.85%	1	\$39.10	28.69%
VA	Hampton/Newport News (SC/Neighborhood Mkt)	5	\$175.30	\$1,314.50	13.34%	5	\$167.50	12.58%
VA	Hanover (SC/Neighborhood Mkt)	3	\$119.70	\$531.40	22.53%	3	\$113.60	22.03%
VA	Henrico (SuperCenter)	6	\$304.20	\$2,028.10	15.00%	7	\$301.40	14.89%
VA	James City (SuperCenter)	2	\$81.80	\$448.80	18.23%	2	\$79.60	17.59%
VA	King George (SuperCenter)	1	\$40.00	\$102.50	39.02%	1	\$38.90	37.48%
VA	Lancaster (SuperCenter)	1	\$42.30	\$89.90	47.05%	1	\$40.10	45.26%

IN REVIEW: WALMART

State	County	2024 Stores	2024 Sales (in millions)	2024 County Food Sales	% of 2024 County Market	2023 Stores	2023 Sales (in millions)	% of 2023 County Market
VA	Loudoun (SuperCenter)	3	\$137.10	\$1,677.10	8.17%	3	\$130.30	8.00%
VA	Norfolk City (SC/Neighborhood Mkt)	4	\$180.30	\$846.80	21.29%	4	\$171.40	20.36%
VA	Nottoway (SuperCenter)	1	\$38.90	\$41.90	92.84%	1	\$36.50	88.81%
VA	Orange (SuperCenter)	2	\$74.20	\$153.10	48.47%	2	\$70.50	47.57%
VA	Page (SuperCenter)	1	\$45.30	\$74.20	61.05%	1	\$42.90	59.83%
VA	Portsmouth City (SuperCenter)	1	\$34.60	\$298.60	11.59%	1	\$33.10	11.10%
VA	Powhatan (SuperCenter)	1	\$43.50	\$82.90	52.47%	1	\$40.90	51.00%
VA	Prince William (SuperCenter)	5	\$140.10	\$2,169.60	6.46%	5	\$133.10	6.19%
VA	Shenandoah (SuperCenter)	1	\$40.80	\$124.70	32.72%	1	\$39.10	31.84%
VA	Southampton (SuperCenter)	1	\$48.30	\$95.20	50.74%	1	\$45.80	46.97%
VA	Spotsylvania (SuperCenter)	4	\$182.30	\$887.30	20.55%	4	\$173.40	20.24%
VA	Stafford (SuperCenter)	2	\$74.60	\$456.30	16.35%	2	\$71.30	16.15%
VA	Suffolk City (SuperCenter)	2	\$83.50	\$345.00	24.20%	2	\$79.20	23.84%
VA	Virginia Beach (SC/Neighborhood Mkt)	7	\$264.30	\$1,831.90	14.43%	7	\$251.30	13.95%
VA	Warren (SuperCenter)	1	\$47.00	\$173.50	27.09%	1	\$44.70	26.23%
VA	York (SuperCenter)	1	\$46.50	\$203.90	22.81%	1	\$44.30	21.84%

VA Recap: 85 stores with sales of \$3.44 billion. Total retail food sales for VA in the study: \$26.65 billion. Walmart share of VA is 12.89%.

Mid-Atlantic Recap: 158 stores with sales of \$6.33 billion annually. Mid-Atlantic retail food sales total: \$61.3 billion.

Walmart Per Store Average: \$40.08 million

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

Source: Food World, June 2024

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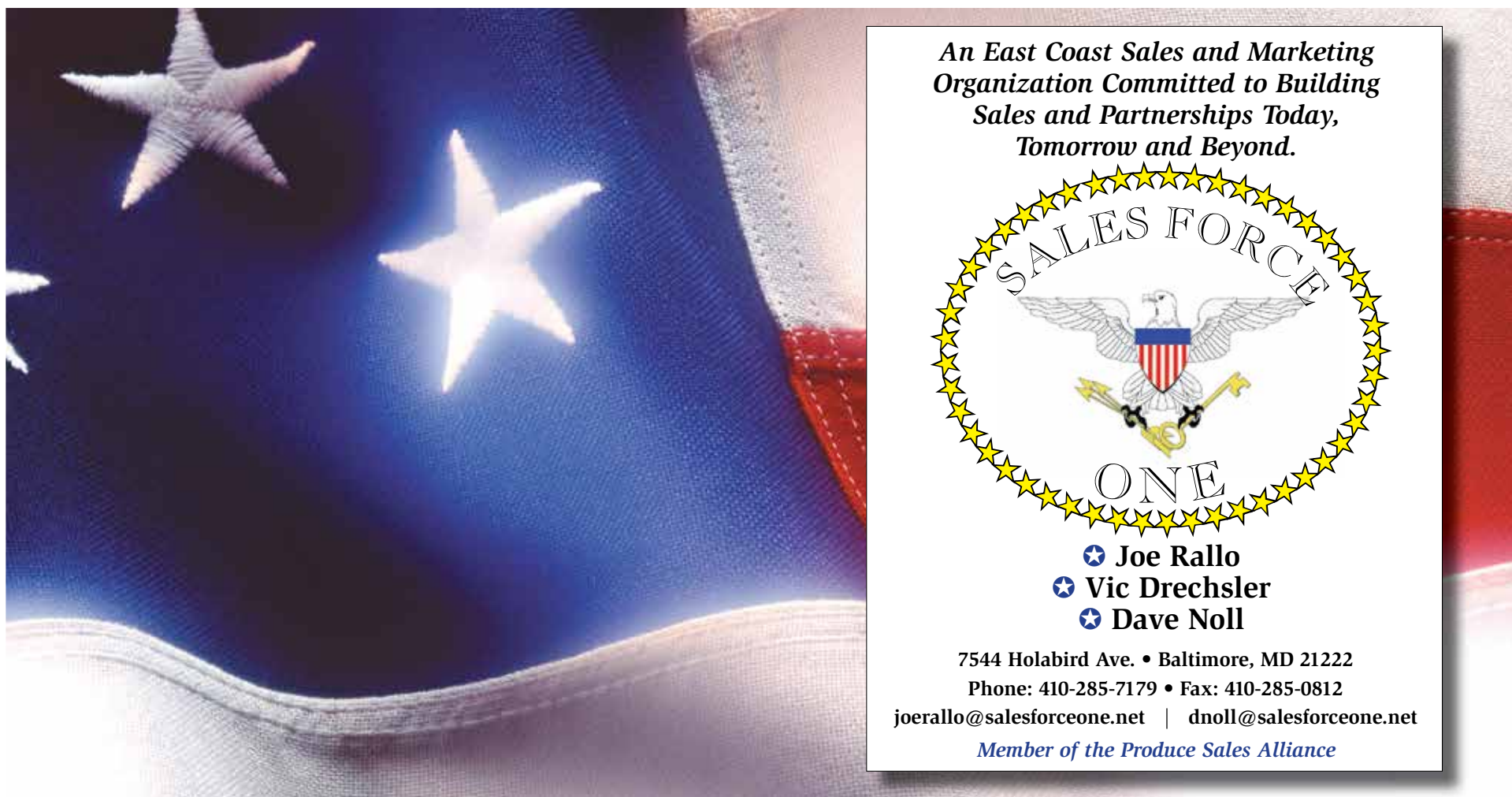
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Baltimore-Washington Supermarket Leaders

- Giant Retains B-W Dominance
- Safeway Holds Serve
- International Markets Growing
- Trader Joe's Comps Among Best
- 2 Tales: WFM Up, AF Fading

		2024	2024 Sales	% of 2024	2023	2023 Sales	% of 2023
Rank	Company	Stores	(in millions)	Market	Stores	(in millions)	Market
1	Giant Food	154	\$6,072.50	30.28%	155	\$6,078.80	30.73%
2	Albertsons (Acme/Balducci's/Safeway)	114	\$3,162.60	15.77%	114	\$3,093.70	15.64%
3	International Markets	127	\$2,034.40	10.14%	126	\$2,001.10	10.12%
4	Wegmans	20	\$1,958.10	9.76%	20	\$1,956.00	9.89%
5	Harris Teeter	49	\$1,766.40	8.81%	49	\$1,771.80	8.96%
6	Whole Foods (AmazonFresh)	37	\$1,326.90	6.62%	36	\$1,279.50	6.47%
7	Weis Markets	49	\$941.22	4.69%	49	\$914.09	4.62%
8	Aldi	84	\$767.90	3.79%	83	\$734.90	3.71%
9	Trader Joe's	26	\$721.70	3.60%	23	\$649.70	3.28%
10	Food Lion	52	\$696.60	3.48%	52	\$692.40	3.50%
		712	\$19,448.32	96.96%	707	\$19,171.99	96.91%

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 \$20.06 billion.** Source: Food World, June 2024



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Baltimore-Washington Market Leaders

- Alts. Share Grows To 33.7%
- Giant Doubles Up On Rivals
- WM Posts Strong Comp Sales
- Target Struggles, Closes Units
- Costco, BJ's, Sam's Grab 8%

Rank	Company	2024 Stores	2024 Sales (in millions)	% of 2024 Market	2023 Stores	2023 Sales (in millions)	% of 2023 Market
1	Giant Food	154	\$6,072.50	16.85%	155	\$6,078.80	17.17%
2	Albertsons (Acme/Balducci/S-way)	114	\$3,162.60	8.78%	114	\$3,093.70	8.74%
3	Walmart (SuperCenter)	61	\$2,297.80	6.38%	62	\$2,216.50	6.26%
4	CVS	331	\$2,068.10	5.74%	344	\$2,117.30	5.98%
5	International Markets	127	\$2,034.40	5.65%	126	\$2,001.10	5.65%
6	Wegmans	20	\$1,958.10	5.43%	20	\$1,956.00	5.52%
7	7-Eleven	721	\$1,776.40	4.93%	713	\$1,694.90	4.79%
8	Harris Teeter	49	\$1,766.40	4.90%	49	\$1,771.80	5.00%
9	Costco	22	\$1,677.50	4.66%	22	\$1,638.80	4.63%
10	Target (Super Target)	67	\$1,429.10	3.97%	69	\$1,474.60	4.16%
11	Whole Foods (Amazon Fresh)	37	\$1,326.90	3.68%	36	\$1,279.50	3.61%
12	Walgreens	176	\$1,094.50	3.04%	180	\$1,110.80	3.14%
13	Weis Markets	49	\$941.22	2.61%	49	\$914.09	2.58%
14	Aldi	84	\$767.90	2.13%	83	\$734.90	2.08%
15	Trader Joe's	26	\$721.70	2.00%	23	\$649.70	1.83%
16	Food Lion	52	\$696.60	1.93%	52	\$692.40	1.96%
17	BJ's Wholesale Club	16	\$662.40	1.84%	16	\$654.40	1.85%
18	Wawa	87	\$602.48	1.67%	81	\$526.78	1.49%
19	Shoppers	22	\$592.60	1.64%	22	\$620.30	1.75%
20	Sam's Club	11	\$522.50	1.45%	11	\$513.40	1.45%
		2,226	\$32,171.70	89.28%	2,227	\$31,739.77	89.14%

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 81. Petroleum sales are not included. Counties/cities included are: Washington, DC; Anne Arundel, Balt. City, Baltimore, Calvert, Carroll, Charles, Frederick, Harford, Howard, Montgomery, Prince George's and Queen Anne's in MD; Arlington, Clarke, Culpeper, Fairfax, Fauquier, King George, Loudoun, Pr. William, Spotsylvania, Stafford and Warren and independent cities of Alexandria, Fairfax, Falls Church and Fredericksburg in VA. () Alternate banner. **Total food sales for the area are \$36.03 billion.** Source: Food World, June 2024

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Pennsylvania Food Merchants Association Holds Annual Conference at Lancaster Convention Center May 7-8

The Pennsylvania Food Merchants Association (PFMA) held its annual conference last month at the Lancaster, PA convention center. Among those on hand were (l-r) incoming PFMA chair Andrea Karns of Karns Foods; keynote speaker Patrick Andrews, Pennsylvania Department of Agriculture; and Alex Baloga, PFMA president.



This duo from The Giant Company includes Jeff Hess (l) and Todd O'Hara.



Monica Tice (l) and Theresa Taylor of Weaver's of Wellsville smile for the *Food World* photographer.



This foursome features (l-r) Steven Kyaw and Michiko Thwe of Sushi Awarsei and Scott Karns and Andrea Karns of Karn's Foods.



Albertsons Mid-Atlantic is well represented at the PFMA conference by Dana Ward (l) and James Walden.



Tom Cormier (r) of Ahold Delhaize USA is joined here by Paul Krachuk (l) and Jonathan Gilman of Imperial Dade.



Norm Braun (l) and Manjit Sidhu of Leever's Supermarket attend the PFMA conference earlier this month.



These smiles belong to (l-r) George Preciado, Milo's Tea; Andrea Karns, Karns Foods; Chris Rowley, Milo's Tea; and Maria Maggio, *Food Trade News*.



Chris Irons (l) of McLane Company chats at the conference with Keith Martin of AWG.



Dawn Roller (l) of Brown's Family Markets chats with Lori Price Abrams (c) and Kyle Sepe of Wakefern.



Here we have (l-r) Charles Calabrese, Shelfmark; John Driscoll and Heather Klacik, Weis Markets; and William Needham, Imperial Dade.



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IN REVIEW: HARRIS TEETER

State	County	2024 Stores	2024 Sales (in millions)	2024 County Food Sales	% of 2024 County Market	2023 Stores	2023 Sales (in millions)	% of 2023 County Market
DC	Washington	3	\$169.30	\$2,662.40	6.36%	3	\$166.50	6.36%
DC Recap: 3 stores with sales of \$169.3 million. Total retail food sales for DC in the study: \$2.66 billion. Harris Teeter share of DC is 6.36%.								
DE	Sussex	2	\$38.40	\$1,078.20	3.56%	2	\$42.80	3.97%
DE Recap: 2 stores with sales of \$38.4 million. Total retail food sales for DE in the study: \$1.64 billion. Harris Teeter share of DE is 2.34%.								
MD	Anne Arundel	1	\$38.20	\$2,471.20	1.55%	1	\$38.20	1.53%
MD	Baltimore City	2	\$86.30	\$1,566.00	5.51%	2	\$86.70	5.48%
MD	Calvert	1	\$23.60	\$434.50	5.43%	1	\$23.50	5.55%
MD	Howard	3	\$122.80	\$1,285.80	9.55%	3	\$121.60	9.57%
MD	Montgomery	7	\$195.40	\$4,010.20	4.87%	7	\$196.20	4.95%
MD	Prince George's	2	\$42.30	\$3,586.60	1.18%	2	\$42.60	1.24%
MD	St. Mary's	1	\$31.40	\$406.20	7.73%	1	\$31.10	8.29%
MD	Talbot	1	\$28.30	\$245.70	11.52%	1	\$28.20	11.57%
MD Recap: 18 stores with sales of \$568.3 million. Total retail food sales for MD in the study: \$23.18 billion. Harris Teeter share of MD is 2.45%.								
VA	Albemarle	3	\$77.60	\$716.10	10.84%	3	\$78.30	11.20%
VA	Arlington	6	\$282.40	\$1,038.80	27.19%	6	\$280.70	26.63%
VA	Chesapeake City	3	\$82.50	\$983.60	8.39%	3	\$82.30	8.69%
VA	Fairfax	10	\$399.50	\$6,114.10	6.53%	10	\$402.40	6.70%
VA	Fauquier	1	\$20.30	\$196.80	10.32%	1	\$20.10	10.58%
VA	Hampton/Newport News	2	\$43.50	\$1,314.50	3.31%	2	\$43.20	3.24%
VA	James City	3	\$110.40	\$448.80	24.60%	3	\$109.70	24.24%
VA	Loudoun	9	\$247.40	\$1,677.10	14.75%	9	\$253.50	15.56%
VA	Norfolk City	3	\$73.70	\$846.80	8.70%	3	\$73.20	8.70%
VA	Portsmouth City	1	\$25.90	\$298.60	8.67%	1	\$25.80	8.65%
VA	Prince William	4	\$138.90	\$2,169.60	6.40%	4	\$139.80	6.50%
VA	Suffolk City	1	\$28.90	\$345.00	8.38%	1	\$28.90	8.70%
VA	Virginia Beach	9	\$214.40	\$1,831.90	11.70%	9	\$213.70	11.86%
VA Recap: 55 stores with sales of \$1.75 billion. Total retail food sales for VA in the study: \$26.65 billion. Harris Teeter share of VA is 6.55%.								

Mid-Atlantic Recap: 78 stores with sales of \$2.52 billion annually. Mid-Atlantic retail food sales total: \$61.3 billion.

Harris Teeter Per Store Average: \$32.33 million

Source: *Food World*, June 2024

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IN REVIEW: GIANT FOOD

State	County	2024 Stores	2024 Sales (in millions)	2024 County Food Sales	% of 2024 County Market	2023 Stores	2023 Sales (in millions)	% of 2023 County Market
DC	Washington	7	\$295.50	\$2,662.40	11.10%	7	\$292.40	11.17%
DC Recap: 7 stores with sales of \$295.5 million. Total retail food sales for DC in the study: \$2.66 billion. Giant Food share of DC is 11.1%.								
DE	Sussex	3	\$178.20	\$1,078.20	16.53%	3	\$183.70	17.03%
DE Recap: 3 stores with sales of \$178.2 million. Total retail food sales for DE in the study: \$1.64 billion. Giant Food share of DE is 10.87%.								
MD	Anne Arundel	9	\$458.20	\$2,471.20	18.54%	9	\$457.50	18.36%
MD	Baltimore City	8	\$344.50	\$1,566.00	22.00%	8	\$341.60	21.60%
MD	Baltimore County	14	\$602.30	\$3,673.10	16.40%	14	\$600.90	16.56%
MD	Calvert	3	\$157.30	\$434.50	36.20%	3	\$153.60	36.29%
MD	Carroll	1	\$43.10	\$747.90	5.76%	1	\$43.20	6.00%
MD	Charles	2	\$89.40	\$624.80	14.31%	2	\$89.20	15.79%
MD	Frederick	3	\$130.30	\$1,040.10	12.53%	3	\$128.50	12.66%
MD	Harford	2	\$83.90	\$1,127.10	7.44%	2	\$84.10	7.55%
MD	Howard	7	\$288.30	\$1,285.80	22.42%	7	\$286.70	22.57%
MD	Montgomery	26	\$1,053.70	\$4,010.20	26.28%	26	\$1,054.20	26.60%
MD	Prince George's	17	\$634.40	\$3,586.60	17.69%	17	\$632.10	18.47%
MD	St. Mary's	1	\$39.20	\$406.20	9.65%	1	\$38.90	10.37%
MD	Talbot	1	\$38.70	\$245.70	15.75%	1	\$38.50	15.79%
MD Recap: 94 stores with sales of \$3.96 billion. Total retail food sales for MD in the study: \$23.18 billion. Giant Food share of MD is 17.1%.								
VA	Albemarle	1	\$37.30	\$716.10	5.21%	1	\$37.10	5.31%
VA	Arlington	3	\$102.30	\$1,038.80	9.85%	4	\$117.40	11.14%
VA	Fairfax	29	\$1,049.60	\$6,114.10	17.17%	29	\$1,051.60	17.52%
VA	Fauquier	1	\$33.20	\$196.80	16.87%	1	\$32.90	17.32%
VA	Loudoun	9	\$257.40	\$1,677.10	15.35%	9	\$262.50	16.11%
VA	Prince William	8	\$225.40	\$2,169.60	10.39%	8	\$229.60	10.68%
VA	Spotsylvania	2	\$98.10	\$887.30	11.06%	2	\$96.70	11.29%
VA	Stafford	3	\$125.60	\$456.30	27.53%	3	\$124.10	28.10%

VA Recap: 56 stores with sales of \$1.93 billion. Total retail food sales for VA in the study: \$26.65 billion. Giant Food share of VA is 7.24%

Mid-Atlantic Recap: 160 stores with sales of \$6.37 billion annually. Mid-Atlantic retail food sales total: \$61.3 billion.

Giant Food Per Store Average: \$39.79 million

Source: *Food World*, June 2024



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Giant Food Raises Curtain On New Supermarket In Perring Parkway Shopping Center In Parkville, MD

Last month, Giant Food opened a new 53,000 square foot store in the Perring Plaza Shopping Center in Parkville, MD at the site of a former Shoppers store. At the opening ceremonies were Giant Food executives (l-r) Mike Brenton, president Ira Kress, Diane Hicks, Deanna Venison, store manager Kimberly Carr, Gary Budd and Brian Wanner.



This Giant Food group includes (l-r) Evander Brown, Bruce Balius, Josh Epper-son, Timothy Hubler, Anthony Chanka and Josh Hard-ester.

Melanie Pierce (r) of Rise Baking says hello to (l-r) Kimberly Ali, Casey Clark and Maegan Krystkiewicz, all with Giant Food.



These fine folks are (l-r) Pete Bumbulsky, Fairborn Equipment; Mike Storti, John Pepe, Matt Wullins and Ed Brabazon, all with Lynmar Builders.



Making sure all runs smoothly on opening day at the Perring Parkway store are Giant Food's Bill Campbell (l) and Jeff Walpole.



These Giant Food gentlemen are Joe Downard (l), Jared Robinson (c) and Bill Campbell.



Dawn Hurd (l) and James Lash, both with Giant Food, smile for the Food World camera.



On hand for the big day at the Perring Parkway store are Giant Food's (l-r) Josh Hardester, Anthony Chanka, Felis Andrade and Matt Novosel.



Giant Food's Tanashia Reed (l) and Elmer Dalton chat at the new store opening in Parkville.



Helping ensure a big day one in Parkville are Giant Food's Timothy Hubler (l) and David Grove.



This fearsome foursome features (l-r) Bobbi Majors, Sonya Brown, Patrick Starliper and Paul Maskavich, all with Giant Food.



Cip Andrade (c) of Giant Food is flanked here by Boar's Head's Daniel de la Haba (l) and Adam Pariente.



Glenn Beidler (l) and James Sparks (r) of Advantage Solutions smile for a photo with Giant Food's Timothy Hubler.

IN REVIEW: COSTCO

State	County	2024 Stores	2024 Sales (in millions)	2024 County Food Sales	% of 2024 County Market	2023 Stores	2023 Sales (in millions)	% of 2023 County Market
DC	Washington	1	\$72.20	\$2,662.40	2.71%	1	\$70.80	2.71%
DC Recap: 1 store with sales of \$72.2 million. Total retail food sales for DC in the study: \$2.66 billion. Costco share of DC is 2.71%.								
MD	Anne Arundel	2	\$129.70	\$2,471.20	5.25%	2	\$126.50	5.08%
MD	Baltimore County	2	\$136.20	\$3,673.10	3.71%	2	\$134.90	3.72%
MD	Frederick	1	\$59.80	\$1,040.10	5.75%	1	\$59.20	5.83%
MD	Howard	1	\$65.80	\$1,285.80	5.12%	1	\$64.90	5.11%
MD	Montgomery	2	\$194.30	\$4,010.20	4.85%	2	\$190.60	4.81%
MD	Prince George's	3	\$201.70	\$3,586.60	5.62%	3	\$196.50	5.74%
MD Recap: 11 stores with sales of \$787.5 million. Total retail food sales for MD in the study: \$23.18 billion. Costco share of MD is 3.4%.								
PA	Dauphin	1	\$58.80	\$1,103.00	5.33%	1	\$58.30	5.28%
PA	Lancaster	1	\$35.90	\$1,809.20	1.98%	1	\$35.40	1.87%
PA Recap: 2 stores with sales of \$94.7 million. Total retail food sales for PA in the study: \$7.17 billion. Costco share of PA is 1.32%.								
VA	Albemarle	1	\$43.70	\$716.10	6.10%	1	\$43.30	6.19%
VA	Arlington	1	\$79.20	\$1,038.80	7.62%	1	\$78.30	7.43%
VA	Chesterfield	1	\$49.90	\$1,710.90	2.92%	1	\$49.30	2.92%
VA	Fairfax	4	\$425.60	\$6,114.10	6.96%	4	\$414.50	6.91%
VA	Frederick	1	\$62.00	\$561.90	11.03%	1	\$61.30	11.26%
VA	Hampton/Newport News	1	\$43.10	\$1,314.50	3.28%	1	\$42.60	3.20%
VA	Henrico	1	\$51.90	\$2,028.10	2.56%	1	\$51.30	2.53%
VA	Loudoun	2	\$182.30	\$1,677.10	10.87%	2	\$175.80	10.79%
VA	Norfolk City	1	\$51.80	\$846.80	6.12%	1	\$51.30	6.09%
VA	Prince William	2	\$93.60	\$2,169.60	4.31%	2	\$90.60	4.22%
VA	Spotsylvania	1	\$37.10	\$887.30	4.18%	1	\$36.20	4.23%
VA Recap: 16 stores with sales of \$1.12 billion. Total retail food sales for VA in the study: \$26.65 billion. Costco share of VA is 4.2%.								

Mid-Atlantic Recap: 30 stores with sales of \$2.07 billion annually. Mid-Atlantic retail food sales total: \$61.3 billion. Costco Per Store Average: \$69.15 million

Source: Food World, June 2024



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TAKING STOCK

from page 16

Shoppers - A year ago, we expressed our optimism about the survival and potential revival back to the halcyon days of the Bowie, MD-based retailer, which began in Washington, DC under the leadership of the Herman family in 1939. After all, four new stores were about to open, and it appeared that parent company UNFI might greenlight other new projects. False alarm. Three of those stores (all in St. Mary's county) have already closed and several sources are telling us that UNFI is actively shopping Shoppers again. That's really a shame and very upsetting to the many Shoppers associates who have loyally supported the company while UNFI (and previous owner Supervalu) have treated the brand like an orphan from a foreign country. VP and GM Jeff Bleichner has done an excellent job of threading the needle for the past five years, but with extremely limited capital spending and indifference from ownership, Shoppers' lame duck status makes it extremely vulnerable.

Amazon Fresh - I know they are not one of the market leaders (although with sister company Whole Foods, they rank 11th in the B-W area), but I can't resist putting my two cents in. After failing spectacularly with its initial foray with "from the ground up" food retailing, AF is returning with a new version of its small grocery store model (one is coming soon to the former Shoppers store in the Potomac Yards in Arlington, VA). And based on a few of the revamped stores in Southern California and in the Chicago market, the largest digitally-driven company in the U.S. still doesn't get it. Yes, there are more SKUs, the product assortment is slightly improved and Krispy Kreme donuts are now available, but it's still the same less than mediocre retailing experience that existed when the first AF store opened in in Franconia (Alexandria), VA two years ago. We expect a few of the original leases that the retailer signed (White Oak, MD; Glen Burnie, MD; Annapolis, MD) to open under the new design, but many of those agreements have been canceled and others are the subject of landlord litigation. While Amazon CEO Andy Jassy continues to express optimism about the future of Amazon Fresh, I think he's delusional about the retailer's long-term prospects, at least with a loser format like this.

'Round The Trade

It's been quite a recent run for Walmart. Last month, the Bentonville, AR merchant posted strong Q1 sales and earnings, especially in this difficult operating environment. Overall revenue increased 6 percent, reaching a staggering \$161.5 billion for the 13-week period ended April 28. Comp store revenue (excluding fuel) jumped 3.8 percent and total profit grew 9.6 percent to \$600 million. Additionally, e-commerce sales were up 21 percent and membership in Walmart's "Plus" program rose 18 percent. During the post-release call with financial analysts, CFO John David Rainey said that Walmart's e-commerce business could be profitable within the next two years and noted that sister firm Sam's Club is already making money from its digital platform. Walmart is also trimming parts of its business that it deems no longer profitable including the recent announcement that it would close all 51 Walmart Health clinics as well as its telehealth operations. Earlier, the "Behemoth" said it is cutting several hundred jobs and asking some associates to move from smaller office locations to more centralized hubs. That's according to *The Wall Street Journal* which noted that while the world's largest retailer will still allow its associates to work remotely some of the time, it is now demanding that employees work primarily from their offices. On the growth side, the planet's largest retailer has expanded its InHome delivery service to four additional cities including Philadelphia and Boston and will now cover 50 markets nationally. InHome began five years ago as a premium service where groceries and other essentials are delivered to a customer's doorstep or unpacked directly into their refrigerators in kitchens and garages. And just before presstime, we learned that Walmart will be taking the major plunge and will place digital shelf labels in all of its 2,300 U. S stores, a huge investment that will take about two years to fully implement. The decision to convert its shelves to all DSLs came after a successful test at a single Texas store. In a post, Daniela Boscan, the chain's food and consumable team lead

TAKING STOCK continues on page 55



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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	14	Wilmington, DE; Charlotte Hall, MD; Cockeysville, MD; Gaithersburg, MD; Prince Frederick, MD; Dillsburg, PA; Gettysburg, PA; Harrisburg, PA; Lancaster, PA; Mount Joy, PA; Waynesboro, PA; Winchester, VA; Washington, DC-2 (S. Dakota Ave., Fort Totten)
Amazon Fresh+	4	Annapolis, MD; Glen Burnie, MD; White Oak, MD; Arlington, VA (Crystal City)
BJ's Wholesale Club	1	Mechanicsburg, PA (r)
Costco	1	Silver Spring Twp., PA
The Fresh Market	1	Crofton, MD
Giant Food	4	Berlin, MD; Bowie, MD; Baltimore, MD* (e) (Wilkins Ave.); Parkville, MD*
Grocery Outlet	3	Rehoboth Beach, DE*; Kent Island, MD; Overlea, MD
Kroger	1	Mechanicsville, VA (r)
Lidl	10	Washington, DC (Upton Place); Bear, DE; Baltimore, MD-2 (Orleans St., Belair Rd.); Bethesda, MD; Germantown, MD; Hyattsville, MD; Pasadena, MD; Rockville, MD; Harrisburg, PA
MOM's Organic Market	3	Washington, DC (Van Ness); Severna Park, MD; Silver Spring, MD
Publix	4	Carrollton, VA; Norfolk, VA; Spotsylvania, VA; Virginia Beach, VA
Sprouts	5	Middletown, DE; Waldorf, MD; Westminster, MD; York, PA; Haymarket, VA
Target	2	Middletown, DE; Arcola, VA
Trader Joe's	4	Washington, DC (Monroe St.); Arlington, VA (Crystal City); Leesburg, VA; Springfield, VA (r)
Wegmans	1	Rockville, MD
Weis Markets	4	Middletown, DE; Clarksburg, MD; New Market, MD; Waldorf, MD
Whole Foods	5	Frederick, MD; Arlington, VA (Ballston); Falls Church, VA (E. Broad St. & N. Washington); Reston, VA (r); Woodbridge, VA

(r) replacement store

(e) expansion

*store opened between 4/1/24 and 6/30/24

+Amazon Fresh has only recently confirmed the future opening of Arlington, VA. However, real estate sources have told us the company is working on opening the other 3 stores in our listing

Source: *Food World*, June 2024

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MARYLAND COUNTY SHARE OF MARKET: 2024

Total sales for those Maryland counties included in this study are \$23.18 billion

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

• Population	594,582	• Female	50.4%
• # of Households	221,704	• White	63.8%
• Median Income	\$116,009	• Black	19.8%
• Under age 18	22.2%	• Hispanic	9.4%
• Over age 65	16.2%	• Asian	4.6%

1	Giant Food	9	\$458.20	18.54%
2	Albertsons (Safeway)	8	\$246.30	9.97%
3	Walmart (Supercenter)	4	\$171.50	6.94%
4	Costco	2	\$129.70	5.25%
5	CVS	22	\$121.70	4.92%
6	Sam's Club	3	\$113.80	4.61%
7	Target	5	\$109.30	4.42%
8	7-Eleven	44	\$98.20	3.97%
9	Wegmans	1	\$92.90	3.76%
10	Shoppers	2	\$72.40	2.93%
11	Food Lion	5	\$71.70	2.90%
12	Military Commissaries	2	\$71.60	2.90%
13	Aldi	7	\$67.30	2.72%
14	Walgreens	16	\$64.90	2.63%
15	Wawa	8	\$58.83	2.38%
16	Whole Foods	1	\$55.90	2.26%
17	Weis Markets	3	\$51.78	2.10%
18	Royal Farm Stores	20	\$48.50	1.96%
19	BJ's Wholesale Club	1	\$46.30	1.87%
20	B. Green (Green Valley)	2	\$42.70	1.73%
21	Harris Teeter	1	\$38.20	1.55%
22	International Markets	2	\$33.70	1.36%
23	Geresbeck's Food Market	2	\$22.10	0.89%
24	Trader Joe's	1	\$22.10	0.89%
25	Graul's	2	\$21.90	0.89%
26	C&S Independents	8	\$19.00	0.77%
27	Sprouts	1	\$18.80	0.76%
28	The Fresh Market	1	\$17.40	0.70%
29	Great Valu	1	\$16.10	0.65%
30	Lidl	2	\$15.30	0.62%
31	Dash-In	9	\$14.80	0.60%
32	High's/Baltimore	7	\$11.70	0.47%
33	Grocery Outlet	1	\$6.10	0.25%
34	Save A Lot	1	\$4.20	0.17%

35	Rite Aid	1	\$3.90	0.16%
		205	\$2,458.81	99.50%



BALTIMORE CITY (\$1.6 billion)

• Population	565,239	• Female	53.5%
• # of Households	247,232	• White	27.2%
• Median Income	\$58,349	• Black	62.3%
• Under age 18	20.3%	• Hispanic	6.3%
• Over age 65	15.7%	• Asian	2.8%

1	Giant Food	8	\$344.50	22.00%
2	Walgreens	19	\$141.70	9.05%
3	7-Eleven	44	\$101.40	6.48%
4	Albertsons (Safeway)	3	\$94.80	6.05%
5	CVS	14	\$90.10	5.75%
6	Harris Teeter	2	\$86.30	5.51%
7	Save A Lot	8	\$82.10	5.24%
8	B. Green (Food Depot)	3	\$77.00	4.92%
9	Whole Foods	2	\$63.60	4.06%
10	Royal Farm Stores	24	\$62.10	3.97%
11	International Markets	6	\$49.00	3.13%
12	Shoppers	2	\$40.30	2.57%
13	BJ's Wholesale Club	1	\$37.80	2.41%
14	Rite Aid	7	\$32.50	2.08%
15	Aldi	4	\$28.20	1.80%
16	ShopRite (Klein's)	1	\$27.40	1.75%
17	Streets Market	3	\$25.80	1.65%
18	Target	1	\$22.70	1.45%
19	Sprouts	1	\$18.60	1.19%
20	Wawa	2	\$17.38	1.11%
21	MOM's Organic Market	1	\$16.30	1.04%
22	Eddie's of Roland Park	1	\$12.50	0.84%
23	Lidl	1	\$11.20	0.72%
24	Circle K	2	\$4.40	0.28%
25	Dash-In	1	\$2.80	0.18%
26	High's/Baltimore	1	\$2.50	0.16%
		162	\$1,493.58	95.38%



BALTIMORE COUNTY (\$3.7 billion) (Includes Catonsville, Dundalk, Randallstown, Reisterstown)

• Population	844,703	• Female	52.4%
• # of Households	328,611	• White	53.1%
• Median Income	\$88,157	• Black	31.9%
• Under age 18	21.5%	• Hispanic	6.6%
• Over age 65	18.5%	• Asian	6.6%

1	Giant Food	14	\$602.30	16.40%
2	Walmart (Supercenter)	9	\$379.60	10.33%

See MARYLAND COUNTY SHARE on page 48



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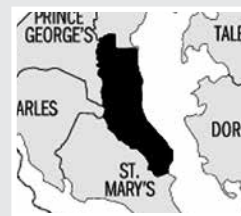
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MARYLAND COUNTY SHARE OF MARKET: 2024

Continued from page 46

3	Weis Markets	12	\$282.26	7.68%
4	Sam's Club	3	\$214.20	5.83%
5	Royal Farm Stores	62	\$195.40	5.32%
6	Albertsons (Safeway)	7	\$179.60	4.89%
7	Wegmans	2	\$173.20	4.72%
8	Walgreens	27	\$170.80	4.65%
9	CVS	25	\$152.70	4.16%
10	International Markets	9	\$149.20	4.06%
11	Costco	2	\$136.20	3.71%
12	7-Eleven	52	\$135.40	3.69%
13	Target	6	\$111.50	3.04%
14	ShopRite (PR/Klein's/Village)	3	\$92.60	2.52%
15	BJ's Wholesale Club	2	\$80.20	2.18%
16	Aldi	11	\$73.10	1.99%
17	Wawa	9	\$66.64	1.81%
18	Food Lion	6	\$63.20	1.72%
19	Shoppers	2	\$50.40	1.37%
20	Lidl	5	\$39.40	1.07%
21	Trader Joe's	2	\$37.70	1.03%
22	Graul's	3	\$35.40	0.96%
23	Whole Foods	1	\$33.50	0.91%
24	MOM's Organic Market	2	\$32.90	0.90%
25	Eddie's of Roland Park	1	\$26.80	0.78%
26	The Fresh Market	2	\$26.60	0.72%
27	Redner's Warehouse Markets	1	\$25.80	0.70%
28	Sprouts	1	\$21.10	0.57%
29	Rite Aid	4	\$20.30	0.55%
30	High's/Baltimore	8	\$15.60	0.42%
31	Geresbeck's Food Market	1	\$13.30	0.36%
32	Grocery Outlet	2	\$10.20	0.28%
33	Save A Lot	2	\$5.90	0.16%
34	Circle K	2	\$5.50	0.15%
35	C&S Independents	3	\$4.00	0.11%
36	Dash-In	1	\$3.20	0.09%
37	ASG	1	\$2.00	0.05%
		305	\$3,669.60	99.90%



CALVERT COUNTY (\$434.5 million) (Includes Dunkirk, Prince Frederick, Solomons)

• Population	94,728	• Female	50.2%
• # of Households	32,284	• White	75.4%
• Median Income	\$128,078	• Black	14.2%
• Under age 18	22.8%	• Hispanic	5.2%
• Over age 65	16.5%	• Asian	2.0%

1	Giant Food	3	\$157.30	36.20%
2	Albertsons (Safeway)	2	\$70.90	16.32%
3	Walmart (Supercenter)	2	\$67.80	15.60%
4	Weis Markets	3	\$47.99	11.04%
5	Harris Teeter	1	\$23.60	5.43%
6	Wawa	2	\$18.25	4.20%
7	7-Eleven	7	\$15.50	3.57%
8	CVS	3	\$14.80	3.41%
9	Walgreens	2	\$11.60	2.67%
10	Dash-In	2	\$4.80	1.10%
		27	\$432.54	99.55%



CAROLINE COUNTY (\$104.4 million) (Includes Denton, Federalsburg, Greensboro)

• Population	33,593	• Female	51.1%
• # of Households	12,013	• White	74.0%
• Median Income	\$65,326	• Black	13.8%
• Under age 18	23.3%	• Hispanic	8.9%
• Over age 65	17.7%	• Asian	1.2%

1	Walmart (Supercenter)	1	\$45.10	43.20%
2	Food Lion	2	\$22.30	21.36%
3	Aldi	1	\$10.60	10.15%
4	Royal Farm Stores	3	\$9.50	9.10%
5	Walgreens	1	\$6.00	5.75%
6	Save A Lot	1	\$4.50	4.31%
7	7-Eleven	1	\$2.60	2.49%
8	Fas-Marts	1	\$2.30	2.20%
		11	\$102.90	98.56%



CARROLL COUNTY (\$747.9 million) (Includes Eldersburg, Manchester, Taneytown, Westminster)

• Population	176,639	• Female	50.1%
• # of Households	63,318	• White	86.5%
• Median Income	\$111,672	• Black	4.4%
• Under age 18	21.7%	• Hispanic	4.6%
• Over age 65	18.1%	• Asian	2.5%

1	Walmart (Supercenter)	4	\$128.20	17.14%
2	Albertsons (Safeway)	3	\$104.80	14.01%
3	Weis Markets	5	\$100.79	13.48%

See MARYLAND COUNTY SHARE on page 50



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MARYLAND COUNTY SHARE OF MARKET: 2024

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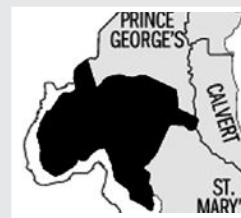
4	The Giant Co. (Martin's)	1	\$76.30	10.20%
5	BJ's Wholesale Club	1	\$46.30	6.19%
6	Food Lion	3	\$45.30	6.06%
7	Giant Food	1	\$43.10	5.76%
8	CVS	6	\$32.40	4.33%
9	7-Eleven	8	\$21.70	2.90%
10	Shoppers	1	\$20.10	2.69%
11	Walgreens	3	\$18.70	2.50%
12	Aldi	2	\$16.90	2.26%
13	Target	1	\$15.60	2.09%
14	Royal Farm Stores	4	\$14.30	1.91%
15	High's/Baltimore	8	\$13.30	1.78%
16	Wawa	2	\$11.73	1.57%
17	IGA	1	\$10.92	1.46%
18	Sheetz	3	\$10.30	1.38%
19	Rite Aid	2	\$9.10	1.22%
20	Grocery Outlet	1	\$5.10	0.68%
		60	\$744.94	99.60%



CECIL COUNTY (\$322.8 million) (Includes Elkton, Northeast)

• Population	105,672	• Female	50.1%
• # of Households	39,338	• White	82.8%
• Median Income	\$86,869	• Black	8.4%
• Under age 18	22.0%	• Hispanic	5.2%
• Over age 65	17.3%	• Asian	1.5%

1	Walmart (Supercenter)	2	\$64.70	20.04%
2	The Giant Co. (Martin's)	1	\$61.80	19.14%
3	Food Lion	3	\$35.60	11.03%
4	Redner's Markets	1	\$26.90	8.33%
5	Wawa	3	\$26.06	8.07%
6	Albertsons (Safeway)	1	\$23.70	7.34%
7	Royal Farm Stores	8	\$19.60	6.07%
8	Walgreens	3	\$14.00	4.34%
9	Aldi	1	\$9.70	3.00%
10	7-Eleven	3	\$8.90	2.76%
11	High's/Baltimore	4	\$8.80	2.73%
12	Grocery Outlet	1	\$7.10	2.20%
13	CVS	1	\$5.20	1.61%
14	Sheetz	1	\$4.80	1.49%
15	Fas-Marts	1	\$2.20	0.68%
		34	\$319.06	98.84%



CHARLES COUNTY (\$624.8 million) (Includes Bryan's Road, Waldorf)

• Population	171,973	• Female	51.6%
• # of Households	59,205	• White	32.9%
• Median Income	\$116,882	• Black	53.3%
• Under age 18	23.6%	• Hispanic	7.5%
• Over age 65	13.9%	• Asian	3.5%

1	Albertsons (Safeway)	3	\$101.80	16.29%
2	Giant Food	2	\$89.40	14.31%
3	Walmart (Supercenter)	2	\$82.30	13.17%
4	Food Lion	3	\$43.90	7.03%
5	7-Eleven	13	\$42.50	6.80%
6	BJ's Wholesale Club	1	\$40.40	6.47%
7	CVS	7	\$38.10	6.10%
8	Sam's Club	1	\$36.50	5.84%
9	Target	2	\$30.00	4.80%
10	Wawa	3	\$21.03	3.37%
11	Dash-In	10	\$18.60	2.98%
12	Walgreens	3	\$16.40	2.62%
13	Shoppers	1	\$15.20	2.43%
14	MOM's Organic Market	1	\$14.00	2.24%
15	Weis Markets	1	\$11.42	1.83%
16	Aldi	2	\$10.50	1.68%
17	Lidl	1	\$8.10	1.30%
		56	\$620.15	99.26%



DORCHESTER COUNTY (\$71.6 million) (Includes Cambridge)

• Population	32,879	• Female	52.7%
• # of Households	13,216	• White	61.8%
• Median Income	\$57,490	• Black	29.2%
• Under age 18	20.9%	• Hispanic	6.4%
• Over age 65	23.1%	• Asian	1.1%

1	Walmart (Supercenter)	1	\$30.30	42.32%
2	Food Lion	1	\$12.50	17.46%
3	Aldi	1	\$9.60	13.41%
4	Wawa	1	\$8.55	11.94%
5	Walgreens	1	\$6.00	8.38%
6	Royal Farm Stores	1	\$3.20	4.47%
		6	\$70.15	97.97%

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MARYLAND COUNTY SHARE OF MARKET: 2024

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

• Population	293,391	• Female	50.4%
• # of Households	99,891	• White	67.6%
• Median Income	\$115,724	• Black	12.1%
• Under age 18	23.0%	• Hispanic	11.9%
• Over age 65	15.5%	• Asian	6.3%

1	Weis Markets	6	\$151.20	14.54%
2	Giant Food	3	\$130.30	12.53%
3	Walmart (Supercenter)	2	\$124.70	11.99%
4	Wegmans	1	\$76.60	7.36%
5	Food Lion	5	\$75.70	7.28%
6	CVS	12	\$68.50	6.59%
7	Costco	1	\$59.80	5.75%
8	Giant Eagle (Get Go)	4	\$42.20	4.06%
9	Albertsons (Safeway)	2	\$38.90	3.74%
10	Sam's Club	1	\$35.20	3.38%
11	Sheetz	8	\$31.80	3.06%
12	Walgreens	5	\$28.50	2.74%
13	7-Eleven	15	\$27.50	2.64%
14	Royal Farm Stores	6	\$23.70	2.28%
15	Aldi	2	\$22.40	2.15%
16	Wawa	3	\$17.74	1.71%
17	Target	1	\$17.10	1.64%
18	International Markets	1	\$14.10	1.36%
19	MOM's Organic Market	1	\$12.90	1.24%
20	Rutter's Farm Stores	3	\$12.10	1.16%
21	Military Commissaries	1	\$8.90	0.86%
22	Lidl	1	\$8.80	0.85%
23	High's/Baltimore	4	\$6.50	0.62%
24	Dash-In	1	\$2.00	0.19%
25	C&S Independents	2	\$0.91	0.09%
		91	\$1,038.05	99.80%



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

• Population	264,644	• Female	50.7%
• # of Households	98,822	• White	73.2%
• Median Income	\$106,417	• Black	16.0%
• Under age 18	22.0%	• Hispanic	5.3%
• Over age 65	17.5%	• Asian	3.2%

1	ShopRite (Klein's)	6	\$242.40	21.51%
2	Walmart (Supercenter)	3	\$102.40	9.09%
3	Wegmans	1	\$97.60	8.66%
4	Giant Food	2	\$83.90	7.44%

5	Wawa	10	\$75.09	6.66%
6	Walgreens	11	\$59.90	5.31%
7	Target	3	\$54.60	4.84%
8	Royal Farm Stores	17	\$52.50	4.66%
9	Weis Markets	2	\$51.54	4.57%
10	BJ's Wholesale Club	1	\$46.40	4.12%
11	CVS	8	\$36.70	3.26%
12	Redner's Markets	2	\$35.80	3.18%
13	Albertsons (Safeway)	1	\$32.60	2.89%
14	7-Eleven	17	\$25.90	2.30%
15	Aldi	4	\$21.90	1.94%
16	Family Owned Markets	1	\$21.54	1.91%
17	Sprouts	1	\$17.70	1.57%
18	Military Commissaries	1	\$12.90	1.14%
19	High's/Baltimore	7	\$12.50	1.11%
20	Rite Aid	3	\$11.80	1.05%
21	Food Lion	2	\$11.10	0.98%
22	Lidl	1	\$9.90	0.88%
23	Save A Lot	1	\$5.60	0.50%
24	Sheetz	1	\$3.50	0.31%
25	C&S Independents	1	\$0.04	0.00%
		107	\$1,125.81	99.89%



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

• Population	336,001	• Female	50.6%
• # of Households	119,230	• White	47.5%
• Median Income	\$140,971	• Black	21.3%
• Under age 18	23.5%	• Hispanic	7.9%
• Over age 65	15.4%	• Asian	20.5%

1	Giant Food	7	\$288.30	22.42%
2	Harris Teeter	3	\$122.80	9.55%
3	Wegmans	1	\$110.20	8.57%
4	Walmart (Supercenter)	2	\$80.30	6.25%
5	Albertsons (Safeway)	3	\$77.50	6.03%
6	Costco	1	\$65.80	5.12%
7	Weis Markets	3	\$64.14	4.99%
8	International Markets	3	\$58.80	4.57%
9	CVS	9	\$46.30	3.60%
10	Target	2	\$45.30	3.52%
11	Whole Foods	1	\$43.20	3.36%
12	BJ's Wholesale Club	1	\$37.60	2.92%
13	Trader Joe's	1	\$30.50	2.37%
14	7-Eleven	11	\$26.50	2.06%
15	B. Green (Green Valley)	1	\$24.20	1.88%
16	Walgreens	4	\$23.80	1.85%

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17	Food Lion	2	\$23.50	1.83%
18	Sprouts	1	\$20.90	1.63%
19	Royal Farm Stores	7	\$20.40	1.59%
20	MOM's Organic Market	1	\$15.20	1.18%
21	Aldi	1	\$13.10	1.02%
22	High's/Baltimore	8	\$12.70	0.99%
23	Roots Markets	1	\$12.30	0.96%
24	Lidl	1	\$8.80	0.68%
25	Rite Aid	1	\$4.50	0.35%
26	Circle K	2	\$4.40	0.34%
27	Dash-In	1	\$2.40	0.19%
		79	\$1,283.44	99.82%

8	7-Eleven	68	\$159.20	3.97%
9	Trader Joe's	5	\$150.30	3.75%
10	Target	6	\$133.50	3.33%
11	Wegmans	1	\$99.70	2.49%
12	Aldi	8	\$75.50	1.88%
13	Walgreens	12	\$75.40	1.88%
14	Sam's Club	1	\$47.40	1.18%
15	Walmart (Supercenter)	1	\$42.80	1.07%
16	MOM's Organic Market	2	\$35.60	0.89%
17	Weis Markets	2	\$29.22	0.73%
18	Sprouts	1	\$18.20	0.45%
19	Lidl	3	\$16.40	0.41%
20	Streets Market	1	\$13.40	0.33%
21	Food Lion	1	\$12.20	0.30%
22	Roots Markets	1	\$11.80	0.29%
23	The Fresh Market	1	\$9.60	0.24%
24	Military Commissaries	1	\$7.90	0.20%
25	Wawa	1	\$5.78	0.14%
26	Royal Farm Stores	1	\$4.40	0.11%
27	Dash-In	1	\$2.20	0.05%
28	C&S Independents	3	\$0.31	0.01%
		245	\$4,010.71	100.01%*



KENT COUNTY (\$102.2 million) (Includes Chestertown, Worton)

- Population 19,303
- # of Households 8,375
- Median Income \$71,635
- Under age 18 15.1%
- Over age 65 28.2%
- Female 51.6%
- White 77.9%
- Black 14.2%
- Hispanic 5.0%
- Asian 1.5%

1	Redner's Markets	1	\$26.30	25.73%
2	Walgreens	2	\$22.10	21.62%
3	Albertsons (Safeway)	1	\$20.60	20.16%
4	Food Lion	1	\$16.40	16.05%
5	Royal Farm Stores	2	\$6.50	6.36%
6	7-Eleven	1	\$3.20	3.13%
7	Fas-Marts	1	\$2.20	2.15%
8	High's/Baltimore	1	\$2.20	2.15%
9	C&S Independents	2	\$1.13	1.11%
		12	\$100.63	98.46%



PRINCE GEORGE'S COUNTY (\$3.6 billion) (Includes Bowie, Clinton, College Park, Hyattsville, Laurel, Oxon Hill)

- Population 947,430
- # of Households 341,057
- Median Income \$97,935
- Under age 18 21.7%
- Over age 65 15.3%
- Female 51.7%
- White 11.4%
- Black 64.1%
- Hispanic 20.9%
- Asian 4.4%

1	Giant Food	17	\$634.40	17.69%
2	International Markets	24	\$389.20	10.85%
3	7-Eleven	82	\$325.40	9.07%
4	Shoppers	11	\$305.20	8.51%
5	Albertsons (Safeway)	9	\$283.70	7.91%
6	CVS	46	\$277.30	7.73%
7	Target	8	\$218.40	6.09%
8	Costco	3	\$201.70	5.62%
9	Aldi	13	\$122.40	3.41%
10	Wegmans	1	\$98.30	2.74%
11	Walmart (Supercenter)	4	\$95.10	2.65%
12	BJ's Wholesale Club	2	\$86.50	2.41%
13	Walgreens	11	\$68.60	1.91%
14	Wawa	11	\$66.27	1.85%
15	Royal Farm Stores	13	\$54.10	1.51%
16	Lidl	6	\$52.90	1.47%



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

- Population 1,058,474
- # of Households 385,284
- Median Income \$125,583
- Under age 18 22.5%
- Over age 65 17.2%
- Female 51.2%
- White 41.4%
- Black 20.7%
- Hispanic 20.3%
- Asian 16.2%


1	Giant Food	26	\$1,053.70	26.28%
2	Albertsons (Balducci's/Safeway)	19	\$540.40	13.48%
3	CVS	43	\$450.60	11.24%
4	International Markets	20	\$359.40	8.96%
5	Whole Foods (Amazon Fresh)	7	\$266.10	6.64%
6	Harris Teeter	7	\$195.40	4.87%
7	Costco	2	\$194.30	4.85%

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MARYLAND COUNTY SHARE OF MARKET: 2024

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17	Military Commissaries	1	\$43.40	1.21%
18	Food Lion	3	\$42.60	1.19%
19	Harris Teeter	2	\$42.30	1.18%
20	Weis Markets	3	\$40.13	1.12%
21	Whole Foods	1	\$34.90	0.97%
22	MOM's Organic Market	2	\$31.10	0.87%
23	Trader Joe's	1	\$18.80	0.52%
24	Save A Lot	4	\$18.50	0.52%
25	Dash-In	7	\$15.80	0.44%
26	ASG	3	\$14.70	0.41%
27	Circle K	1	\$2.00	0.06%
		289	\$3,583.70	99.92%




ST. MARY'S COUNTY (\$406.2 million)
(Includes Charlotte Hall, Leonardtown, Lexington Park)

- Population 115,281
- # of Households 41,211
- Median Income \$113,668
- Under age 18 23.7%
- Over age 65 14.2%
- Female 49.6%
- White 72.2%
- Black 15.6%
- Hispanic 6.0%
- Asian 3.0%

1	Walmart (Supercenter)	1	\$64.20	15.81%
2	BJ's Wholesale Club	1	\$40.90	10.07%
3	Giant Food	1	\$39.20	9.65%
4	Weis Markets	2	\$37.72	9.29%
5	Wawa	4	\$36.13	8.89%
6	Food Lion	2	\$32.20	7.93%
7	Harris Teeter	1	\$31.40	7.73%
8	Shoppers#	3	\$30.40	7.48%
9	CVS	6	\$27.00	6.65%
10	Military Commissaries	1	\$16.80	4.14%
11	Target	1	\$16.60	4.09%
12	Walgreens	2	\$9.40	2.31%
13	Aldi	1	\$8.80	2.17%
14	Sheetz	2	\$7.30	1.80%
15	Dash-In	2	\$4.50	1.11%
16	7-Eleven	1	\$2.60	0.64%
17	C&S Independents	1	\$0.14	0.03%
		32	\$405.29	99.78%


#These 3 stores, which opened last year, closed in May 2024 after our measuring period ended.



QUEEN ANNE'S COUNTY (\$157.8 million)
(Includes Centreville, Chester, Stevensville)

- Population 52,508
- # of Households 19,351
- Median Income \$108,332
- Under age 18 20.6%
- Over age 65 20.7%
- Female 50.1%
- White 85.6%
- Black 6.2%
- Hispanic 4.9%
- Asian 1.3%


1	Albertsons (Safeway)	2	\$65.30	41.38%
2	Food Lion	2	\$25.10	15.91%
3	Target	1	\$20.20	12.80%
4	Walgreens	2	\$12.90	8.17%
5	Royal Farm Stores	3	\$9.20	5.83%
6	Wawa	1	\$8.15	5.16%
7	7-Eleven	3	\$8.10	5.13%
8	Fas-Marts	2	\$2.70	1.71%
9	Dash-In	1	\$2.60	1.65%
		17	\$154.25	97.75%



TALBOT COUNTY (\$245.7 million)
(Includes Easton, St. Michael's)

- Population 37,823
- # of Households 16,260
- Median Income \$81,667
- Under age 18 18.0%
- Over age 65 30.5%
- Female 52.3%
- White 76.5%
- Black 12.8%
- Hispanic 7.9%
- Asian 1.5%

1	Giant Food	1	\$38.70	15.75%
2	BJ's Wholesale Club	1	\$38.30	15.59%
3	Harris Teeter	1	\$28.30	11.52%
4	Walmart	1	\$25.30	10.30%
5	Albertsons (Acme)	1	\$20.90	8.51%
6	Target	1	\$18.60	7.57%
7	Graul's	1	\$10.90	4.44%
8	Weis Markets	1	\$10.51	4.28%
9	Aldi	1	\$9.20	3.74%
10	CVS	2	\$8.10	3.30%
11	Royal Farm Stores	2	\$7.60	3.09%
12	Wawa	1	\$7.15	2.91%
13	Walgreens	1	\$5.30	2.16%



SOMERSET COUNTY (\$48.3 million)
(Includes Crisfield)

- Population 24,910
- # of Households 8,355
- Median Income \$52,149
- Under age 18 17.1%
- Over age 65 18.1%
- Female 45.4%
- White 52.0%
- Black 40.5%
- Hispanic 4.3%
- Asian 0.9%

1	Food Lion	2	\$28.40	58.80%
2	Royal Farm Stores	2	\$8.20	16.98%
3	Rite Aid	1	\$3.40	7.04%
4	Dash-In	1	\$2.60	5.38%
5	Fas-Marts	1	\$2.40	4.97%
		7	\$45.00	93.17%

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TAKING STOCK

from page 43

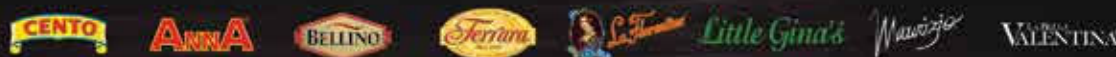
stated: "This represents a significant shift in how I, and other store associates, manage pricing, inventory, order fulfillment and customer interactions, ensuring our customers enjoy an even better shopping experience. Walmart stores have over 120,000 products on the shelves, each with an individual price tag. Every week our stores support thousands of pricing updates on new items, Rollbacks and markdowns. Digital shelf labels, developed by the Vusion Group, allow us to update prices at the shelf using a mobile app, reducing the need to walk around the store to change paper tags by hand and giving us more time to support customers in the stores." Obviously, this is a major undertaking that other retailers will be adding to their operational functions, especially if the costs continue to come down...and who's got numbers comparable to (if not slightly better than) Walmart? Well, that would be Costco, of course. In his first full quarter as CEO, Ron Vachris is off to a fast start. In Q3, the Issaquah, WA-based club king saw its net sales increase 9.1 percent over a year ago to \$57.4 billion and at its nearly 600 U.S. stores, comp store revenue grew by 6.2 percent. On the earnings front, Costco's net profit for the 13-week period was \$1.68 billion, a gain of more than \$300 million from last year. Costco's "hidden gold mine," membership fees, raked in \$1.12 billion in its third quarter, a 7.6 percent increase versus the corresponding period last year. Shortly after Costco posted its most recent earnings, new CFO Gary Millerchip (who had held that same title at Kroger since 2017) until he joined Costco this past January, told *The Wall Street Journal* that he's got high hopes to significantly increase Costco's e-commerce sales. "We believe there's a lot more opportunity to grow digital. I have experience in those areas and would hope that I can bring some of that help us continue to evolve, but very much in the Costco way." This looks like a no brainer for Millerchip and his new company. Digital growth has been increasing since the pandemic and in Costco's recently completed third quarter, e-commerce revenue grew 20.8 percent...the bottom line continues to look a lot different at wholesaler UNFI. First some good news: the Providence, RI-based distributor, which also owns the Cub and Shoppers retail banners, has extended its supply contract with its largest customer, Whole Foods Market, for an additional eight years (through May 2032). While the WFM deal comes at a comparatively low margin, it was an important renewal both as an infrastructure foundation for Wall Street and industry perception. UNFI also cut the ribbon on a beautiful new 1.3 million square foot distribution center in Manchester, PA (York County) this month. The modern depot will supply most of UNFI's independent customers in the Mid-Atlantic market. Now, for the not-so-good news. Approximately 75 truck drivers at the company's nearby Harrisburg depot (the old SuperRite warehouse) have agreed to unionize (Local 776), continuing an 18-month cycle in which drivers at other UNFI facilities in Connecticut, Arizona, California, Georgia, Iowa and Washington have agreed to organize. And then there's the current state of UNFI earnings and sales. The encouraging news is that the losses are getting smaller - negative \$21 million in its recently completed Q3. Its sales decline is also shrinking - down only 0.1 percent. But the balance sheet isn't the only issue that UNFI needs to improve. As I've stated in previous columns, UNFI must upgrade its overall efficiency and execution - once the early kinks from the new DC are worked out, that's likely to happen in terms of warehousing and logistics. But other issues that are vital to its many independent customers in the Mid-Atlantic - a more competitive private label program and better one-on-one interaction - would go a long way to improving its image among its customers. Again, that's not just an observation, those are criticisms and frustrations I'm hearing directly from the independent owners...and it's not only UNFI that's got union issues, but the labor group (the Amazon Labor Union) that unionized an Amazon fulfillment center on Staten Island two years ago, is likely to become affiliated with the International Brotherhood of Teamsters, which should give organized labor a lot more clout in its efforts to unionize other Amazon depots nationally. By the way, "Godzilla" still has not recognized the ALU and continues to fight the decision in court...and speaking of Amazon, John "Whacky" Mackey, founder and former CEO of Whole Foods who sold his business to Amazon for \$13.7 billion in cash in 2017, told *Fortune* magazine that he really likes former Amazon chief executive Jeff Bezos and the company "because they didn't try to change Whole

TAKING STOCK continues on page 68

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MARYLAND COUNTY SHARE OF MARKET: 2024

Continued from page 54


14	7-Eleven	2	\$5.20	2.12%
15	High's/Baltimore	2	\$3.70	1.51%
16	Rite Aid	1	\$3.10	1.26%
17	Fas-Marts	1	\$2.20	0.90%
		21	\$243.06	98.93%

7	Wawa	2	\$12.13	3.82%
8	Aldi	1	\$11.90	3.75%
9	Walgreens	2	\$11.30	3.56%
10	Rite Aid	2	\$8.20	2.58%
11	CVS	2	\$8.10	2.55%
12	7-Eleven	2	\$6.20	1.95%
13	Fas-Marts	4	\$4.60	1.45%
14	Save A Lot	1	\$4.40	1.39%
15	Grocery Outlet	1	\$4.10	1.29%
16	Dash-In	1	\$2.60	0.82%
		35	\$315.23	99.32%



WASHINGTON COUNTY (\$579.6 million)
(Includes Fountainhead, Hagerstown, Hancock)

- Population 155,813
- # of Households 59,051
- Median Income \$73,017
- Under age 18 21.5%
- Over age 65 18.2%
- Female 49.0%
- White 74.7%
- Black 13.5%
- Hispanic 7.2%
- Asian 2.1%




WORCESTER COUNTY (\$254.7million)
(Includes Ocean City, Pocomoke City, Snow Hill)

- Population 54,171
- # of Households 23,457
- Median Income \$76,689
- Under age 18 16.9%
- Over age 65 29.0%
- Female 50.9%
- White 80.1%
- Black 12.5%
- Hispanic 3.9%
- Asian 1.7%

1	The Giant Co. (Martins')	4	\$182.60	31.50%
2	Walmart (Supercenter)	2	\$126.80	21.88%
3	Weis Markets	3	\$72.17	12.45%
4	Sam's Club	1	\$42.30	7.30%
5	Sheetz	8	\$32.00	5.52%
6	CVS	6	\$20.10	3.47%
7	Walgreens	3	\$16.60	2.86%
8	Target	1	\$15.20	2.62%
9	Aldi	2	\$15.10	2.61%
10	Save A Lot	2	\$13.30	2.29%
11	Food Lion	1	\$11.60	2.00%
12	Lidl	1	\$8.40	1.45%
13	Grocery Outlet	1	\$6.40	1.10%
14	7-Eleven	2	\$5.30	0.91%
15	High's/Baltimore	2	\$4.40	0.76%
16	Royal Farm Stores	1	\$4.20	0.72%
17	C&S Independents	2	\$0.91	0.16%
		42	\$577.38	99.62%

1	Walmart (Supercenter)	2	\$86.70	34.04%
2	Food Lion	4	\$61.80	24.26%
3	CVS	3	\$19.30	7.58%
4	7-Eleven	8	\$19.10	7.50%
5	Albertsons (Acme)	1	\$19.00	7.46%
6	Wawa	2	\$12.91	5.07%
7	Aldi	1	\$10.70	4.20%
8	Rite Aid	3	\$10.50	4.12%
9	Royal Farm Stores	3	\$8.70	3.42%
10	Walgreens	1	\$7.30	2.87%
11	Fas-Marts	1	\$2.40	0.94%
12	C&S Independents	3	\$0.34	0.13%
		32	\$258.75	101.59%*



WICOMICO COUNTY (\$317.4 million)
(Includes Fruitland, Salisbury)

- Population 104,800
- # of Households 39,939
- Median Income \$69,421
- Under age 18 21.9%
- Over age 65 17.0%
- Female 52.4%
- White 60.4%
- Black 28.0%
- Hispanic 6.0%
- Asian 3.3%

1	Walmart (Supercenter)	2	\$84.50	26.62%
2	Albertsons (Acme)	1	\$40.40	12.73%
3	Food Lion	4	\$40.10	12.63%
4	Sam's Club	1	\$38.60	12.16%
5	Royal Farm Stores	8	\$22.40	7.06%
6	Target	1	\$15.70	4.95%

() 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 2024

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Legislative Line

Finally – A Farm Bill

Finally, late last month the official text and miscellaneous other information regarding the first draft of a 942-page House farm bill entitled the “Farm, Food, and National Security Act of 2024” was released. At press time, the Senate had not released their version of the farm bill but only disseminated some summary details. Nevertheless, let the debate begin!

For those tracking the farm bill, the House and in due course a Senate version will go before various committees and eventually a compromise version will hopefully make it to the President’s desk for his signature. The House version maintains the \$1.5 trillion ten-year farm bill baseline, while the Senate draft version appears to go over it by at least \$5 billion or more. So,

the House approach is budget neutral, and the Senate version is not.

The current farm bill, which was extended once already, expires on September 30, 2024. This latest move to get farm bill versions out of the House and Senate are major first steps though and many are delighted that the process has finally begun. However, the devil will be in the details which are now being ironed out. It is going to be a very difficult process as with the release of the first drafts, the House and Senate Republicans and Democrats are far, far apart in their thinking. But these days that is the standard operating procedure for most legislative proposals on the Hill. The farm bill is reauthorized every five years by Congress and impacts

everyone from “farm to fork” including farmers, food processors, manufacturers, retailers, and consumers.

House Majority Plans

By the start of the August Congressional recess, House Republicans say they hope to pass all the fiscal 2025 appropriations bills which they publicly disclosed late last month. House Majority Leader Steve Scalise (R.- La.) said he will move, at press time, the Military Construction-VA bill and then focus on the defense authorization bill, the Homeland Security, State-Foreign Operations and Defense measures afterward. The game plan is to move some of the more important legislation before Republicans head to Milwaukee for the Republican



Barry F. Scher
Policy Solutions LLC

National Convention in July.

Price Gouging by Grocers

You may recall in a prior commentary of mine that I

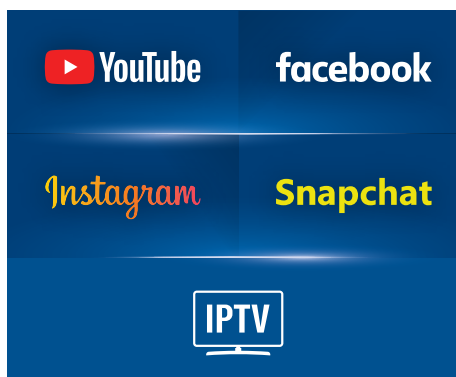
mentioned that Democrats are calling on President Biden to investigate price gouging by food retailers. Senator Elizabeth Warren (D-Mass.) and House member Jim McGovern (D-Mass.) authored a joint letter to the President which was signed by dozens of other Democratic lawmakers stating that American’s grocers are making record profits as families struggle with high food prices. The lawmakers are urging the President to create a joint task force from the Federal Trade Commission and the Commodity Futures Trading Commission to investigate price manipulation throughout the food supply chain.

But wait. I discovered there is

See **LEGISLATIVE LINE**
on page 72

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*Scotties® tissue is manufactured by Irving Consumer Products, Inc., an affiliate of J.D. Irving, Limited. J.D. Irving Limited and its affiliates have planted more than 1 billion trees since 1957. Scotties® is a registered trademark of Kimberly-Clark Worldwide, Inc. Used under license. **Data is from Circana Total U.S. MULO period ending April 21, 2024.

†Each year, forests managed by J.D. Irving, Limited and affiliated corporations remove more carbon than is emitted in the lifecycle of Scotties® Facial Tissue products.





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Second Generation: Ralph* and Shirley Klein*

Third Generation: Andrew P. Klein* and Howard S. Klein*; Michael J. Klein, *Chairman*

Fourth Generation: Marshall J. Klein, *President & CEO*; Sarah B. Klein, *Vice President*;
Jacob I. Klein, *Vice President*; Stephen H. Klein, *Vice President*; David C. Klein, *Vice President*

**Deceased*

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(410) 420-8220
Pharmacy: (410) 838-8880

Jacksonville

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

North Main St. Bel Air

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

Festival at Bel Air

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

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1321 Riverside Parkway
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IN REVIEW: WHOLE FOODS

State	County	2024 Stores	2024 Sales (in millions)	2024 County Food Sales	% of 2024 County Market	2023 Stores	2023 Sales (in millions)	% of 2023 County Market
DC	Washington (Amazon Fresh)	9	\$363.40	\$2,662.40	13.65%	8	\$319.60	12.21%
DC Recap: 9 stores with sales of \$363.4 million. Total retail food sales for DC in the study: \$2.66 billion. Whole Foods share of DC is 13.65%.								
MD	Anne Arundel	1	\$55.90	\$2,471.20	2.26%	1	\$55.80	2.24%
MD	Baltimore City	2	\$63.60	\$1,566.00	4.06%	2	\$63.50	4.02%
MD	Baltimore County	1	\$33.50	\$3,673.10	0.91%	1	\$33.10	0.91%
MD	Howard	1	\$43.20	\$1,285.80	3.36%	1	\$43.00	3.39%
MD	Montgomery (Amazon Fresh)	7	\$266.10	\$4,010.20	6.64%	7	\$264.50	6.67%
MD	Prince George's	1	\$34.90	\$3,586.60	0.97%	1	\$34.90	1.02%
MD Recap: 13 stores with sales of \$497.2 million. Total retail food sales for MD in the study: \$23.18 billion. Whole Foods share of MD is 2.15%.								
PA	Lancaster	1	\$39.30	\$1,809.20	2.17%	1	\$39.10	2.07%
PA Recap: 1 store with sales of \$39.3 million. Total retail food sales for PA in the study: \$7.17 billion. Whole Foods share of PA is 0.55%.								
VA	Albemarle	1	\$37.70	\$716.10	5.26%	1	\$37.40	5.35%
VA	Arlington (Amazon Fresh)	3	\$91.80	\$1,038.80	8.84%	3	\$91.60	8.69%
VA	Fairfax (Amazon Fresh)	10	\$333.00	\$6,114.10	5.45%	10	\$331.10	5.52%
VA	Hampton/Newport News	1	\$32.90	\$1,314.50	2.50%	1	\$32.80	2.46%
VA	Henrico	2	\$47.60	\$2,028.10	2.35%	2	\$47.10	2.33%
VA	Loudoun	1	\$34.30	\$1,677.10	2.05%	1	\$34.20	2.10%
VA	Prince William (Amazon Fresh)	1	\$7.20	\$2,169.60	0.33%	1	\$8.20	0.38%
VA	Virginia Beach	1	\$36.70	\$1,831.90	2.00%	1	\$36.50	2.03%

VA Recap: 20 stores with sales of \$621.2 million. Total retail food sales for VA in the study: \$26.65 billion. Whole Foods share of VA is 2.33%.

Mid-Atlantic Recap: 43 stores with sales of \$1.52 billion annually. Mid-Atlantic retail food sales total: \$61.3 billion.

Whole Foods Per Store Average: \$35.37 million () Name in parentheses indicates another banner used by the company.

Source: *Food World*, June 2024

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Retailers, Suppliers Travel To Houston's George R. Brown Convention Center For IDDBA 2024



The International Dairy Deli Bakery's flagship show – IDDBA 2024 - was held earlier this month at the George R. Brown Convention Center in Houston. Checking out IDDBA 2024 from Sprouts Farmers Market were (l-r) Jacob Philpott, Tanya Carlson and Jeff Nachreiner.



This Harris Teeter duo includes Doug Rupertus (l) and Judy Lacjak.



These fine folks are (l-r) Amanda Ratliff and Brett White, Kroger; Elizabeth Shepherd, Empire Marketing Strategies; Garret Fairchild, Danielle Midili and Ryan Terrasas, Kroger.



Here we have (l-r) Kathi Schmidt and Joe Peters, The Giant Company; Dave Deola, Amoroso; Toneya Clark and Rob Palmieri, The Giant Company; and Stepan Belov, Giant Food.



This photo features (back, l-r) Shane Coughlin and Colum Moraham, Affinity Group; Sebastian Margaglio, Rich Foods; Brian Ralston, Mark Mallen and Dave Halushack, Affinity Group; (front, l-r) David Ritacco, Lily Tarolli and Kim Jarzinski, BJ's Wholesale Club.



Handling business at the show for Albertsons are Corey Rodriguez (l) and Summer Firsich.



From Whole Foods, our camera spotted Aye Nyein San (l), Trey McLean (c) and Tom Hermes.



These smiles belong to (l-r) Akhmal Teal, Capitol City Produce; Anthony Armisted, HEB; Debra Moser, Meatcrafters; Eric Schriever, Capitol City Produce; and Mitch Berliner, Meatcrafters.



Among those attending from our market were (l-r) Emily and Jr Paterakis, H&S Bakery; Alison More, Ahold Delhaize USA; Ryan Paterakis, H&S Bakery; Jordan Hoffer and Jatana Barger, Ahold Delhaize USA.



Weis Markets is well represented in Houston by Bill Petrie and Jillian Petrie.



Jen Harper (l) of Redner's Markets is joined here by John Rea (c) of Rise Baking and Nancy Rodgers-Fluharty of Pace Target Brokerage.



JOH was out at full force at this year's IDDBA, represented by (l-r) Peter Vail, Allan Perkins, Lisa Podesta Coombs, Jeff Hodge, Joe Navitsky and Alex Sykes.



This CA Ferolie team photo features (l-r) Wil Magistrelli, Charles Woods, Lauri McKenna, Rusty McDaniel, Liz Hinson, Eric Jordan, Steve Dermijian, Janelle Stone and Ernie Vespole.



This Taylor Farms group shot includes (l-r) Chris Cunningham, Michelle Story, Garth Borman, Maureen Davis and Jennifer Watts.



These industry vets are (l-r) Dan Fitzpatrick, Irresistible Foods Group (IFG); Michael Hughes, Hughes Sales; Kevin Hinker, IFG; Geoff Mason and Bill Sando, Hughes Sales; Ron Carney, IRG; and Jon Ardary, Hughes Sales.

IN REVIEW: ALBERTSONS MID-ATLANTIC

State	County	2024 Stores	2024 Sales (in millions)	2024 County Food Sales	% of 2024 County Market	2023 Stores	2023 Sales (in millions)	% of 2023 County Market
DC	Washington (Safeway)	12	\$399.70	\$2,662.40	15.01%	12	\$389.60	14.89%

DC Recap: 12 stores with sales of \$399.7 million. Total retail food sales for DC in the study: \$2.66 billion. Albertsons Mid-Atlantic share of DC is 15.01%.

DE	Kent (Acme/Safeway)	2	\$57.40	\$561.70	10.22%	2	\$57.10	10.19%
DE	Sussex (Acme/Safeway)	2	\$68.90	\$1,078.20	6.39%	2	\$68.80	6.38%

DE Recap: 4 stores with sales of \$126.3 million. Total retail food sales for DE in the study: \$1.64 billion. Albertsons Mid-Atlantic share of DE is 7.7%.

MD	Anne Arundel (Safeway)	8	\$246.30	\$2,471.20	9.97%	8	\$240.40	9.65%
MD	Baltimore City (Safeway)	3	\$94.80	\$1,566.00	6.05%	3	\$92.70	5.86%
MD	Baltimore County (Safeway)	7	\$179.60	\$3,673.10	4.89%	7	\$175.10	4.82%
MD	Calvert (Safeway)	2	\$70.90	\$434.50	16.32%	2	\$70.60	16.68%
MD	Carroll (Safeway)	3	\$104.80	\$747.90	14.01%	3	\$101.60	14.11%
MD	Cecil (Acme)	1	\$23.70	\$322.80	7.34%	1	\$23.40	7.38%
MD	Charles (Safeway)	3	\$101.80	\$624.80	16.29%	3	\$101.00	17.88%
MD	Frederick (Safeway)	2	\$38.90	\$1,040.10	3.74%	2	\$36.80	3.62%
MD	Harford (Safeway)	1	\$32.60	\$1,127.10	2.89%	1	\$32.10	2.88%
MD	Howard (Safeway)	3	\$77.50	\$1,285.80	6.03%	3	\$77.20	6.08%
MD	Kent (Acme)	1	\$20.60	\$102.20	20.16%	1	\$20.40	19.71%
MD	Montgomery (Balducci's/Safeway)	19	\$540.40	\$4,010.20	13.48%	19	\$529.70	13.36%
MD	Prince George's (Safeway)	9	\$283.70	\$3,586.60	7.91%	9	\$280.30	8.19%
MD	Queen Anne's (Acme/Safeway)	2	\$65.30	\$157.80	41.38%	2	\$65.10	39.72%
MD	Talbot (Acme)	1	\$20.90	\$245.70	8.51%	1	\$20.90	8.57%
MD	Wicomico (Acme)	1	\$40.40	\$317.40	12.73%	1	\$40.20	12.62%
MD	Worcester (Acme)	1	\$19.00	\$254.70	7.46%	1	\$18.90	7.82%

MD Recap: 67 stores with sales of \$1.96 billion. Total retail food sales for MD in the study: \$23.18 billion. Albertsons Mid-Atlantic share of MD is 8.46%.

VA	Arlington (Balducci's/Safeway)	4	\$79.20	\$1,038.80	7.62%	4	\$77.60	7.36%
VA	Culpeper (Safeway)	1	\$16.40	\$187.40	8.75%	1	\$16.10	8.77%
VA	Fairfax (Balducci's/Safeway)	27	\$681.50	\$6,114.10	11.15%	27	\$663.90	11.06%
VA	Fauquier (Safeway)	1	\$21.80	\$196.80	11.08%	1	\$21.50	11.32%
VA	Loudoun (Safeway)	4	\$58.90	\$1,677.10	3.51%	4	\$57.70	3.54%
VA	Prince William (Safeway)	4	\$90.30	\$2,169.60	4.16%	4	\$86.20	4.01%

VA Recap: 41 stores with sales of \$948.1 million. Total retail food sales for VA in the study: \$26.65 billion. Albertsons Mid-Atlantic share of VA is 3.56%.

Mid-Atlantic Recap: 124 stores with sales of \$3.44 billion annually. Mid-Atlantic retail food sales total: \$61.3 billion.

Albertsons Mid-Atlantic Per Store Average: \$27.7 million () Indicates another banner used by the company.

Source: *Food World*, June 2024



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from page 14

The Fresh Market

Div. of Cencosud
300 N. Greene St., Ste. 1100
Greensboro, NC 27401
Phone: (336) 272-1338
Web: thefreshmarket.com
Pres./CEO: Jason Potter
Primary Supplier: UNFI
FW Stores: 16
FW Vol.: \$207.9 million

Geresbeck's Food Market

2109 Eastern Blvd.
Baltimore, MD 21220
Phone: (410) 686-3487
Web: geresbecks.com
Primary Supplier: C&S
FW Stores: 3
FW Vol.: \$35.4 million

The Giant Company

Div. of Ahold Delhaize USA
P.O. Box 249
1149 Harrisburg Pike
Carlisle, PA 17013
Phone: (717) 249-4000

Web: giantfoodstores.com
Pres.: John Ruane
SVP-Ops./Cust. Exp./Perish. Dist.:
Dave Lessard
VP-Omnichannel Merch.-Fresh: Brian
Lorenz
VP-Omnichannel Merch.-Center
Store: Joanna Crishock
VP-Team Experience: Jennifer
Heinzen-Krueger
VP-Mid-Atlantic Div.: Kathy Sweigert
VP-Greater Phil. Div.: Tim Santoro
VP-Marketing: John MacDonald
CFO: Rebecca Lupfer
Chief of Staff/Dir. of Merch. Acceler-
ation: Jennifer Scott
Primary Distributor: Direct/C&S
Wholesale Grocers
FW Stores: 63 (Includes Martin's)
FW Vol.: \$8.04 billion

Giant Eagle

700 Cranberry Woods Dr
Cranberry Township, PA 16066
Phone: (412) 963-6200
Web: giganteagle.com
CEO: Bill Artman
Primary Supplier: Direct

FW Stores: 4 (includes Get Go)
FW Vol.: \$42.2 million

Giant Food LLC

Div. of Ahold Delhaize USA
8301 Professional Pl.
Landover, MD 20785
Phone: (301) 341-4100
Web: giantfood.com
Pres.: Ira Kress
SVP: Diane Hicks
SVP-Merchandising/Chief Merchant:
Tonya Herring
VP-Mktg.: Dyani Hanrahan
VP-Finance: Tony Matala
VP-HR: Brian Wanner
VP-Dist.: Joe Urban
VP-Cat. Mgmt.-Fresh Foods: Richard
Manzi
Dir.-E-Comm.: Gregg Dorazio
Dir.-Fresh Field Merch.: Dave Grove
Dir.-Pharmacy: Paul Zvaleny
Dir.-Deli-Bakery: Cindy Volk
Dir.-Produce/Floral: Rob Nickels
Dir.-Meat/Seafood: Bill Campbell
Dir.-Non-Perish. Field Merch.: Bobbi
Majors
Dir.-Edible Groc./Dairy/Frozen: Moni-

ca Simmons-Dolce
Dir.-Nonfood: Ashley Gray
Dir.-Merch. Planning: Frank Gallagher
Dir.-Pricing/Promotion: Erik Weenink
Dir.-Brands & Media: Kate Kowalzik
Dir.-Ext. Comms. & Comm Rels.:
Felis Andrade
Dir.-Mktg. Planning & Ops.: Kurt
Guinther
Dir.-Digital Loyalty & CSM: Ryan
Draude
Sales Mgrs.: Paul Maskavich, Lisa
Richardson, Patrick Starliper, Robert
Withers, Joe Adams, Sonya Brown,
Norman Dichard, Jamit Singh
Primary Supplier: Direct/C&S
Wholesale Grocers
FW Stores: 160
FW Vol.: \$6.37 billion

Graul's

12200 Tullamore Rd.
Lutherville, MD 21093
Phone: (410) 308-2100
Web: graulsmarket.com
Officers/Buyers: Harold Graul Jr.,
Fred Graul, Dennis Graul

See **DIRECTORY** on page 71

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Herring Rejoins Giant Food As SVP-Chief Merchant

brella.

In a related move, Giant veteran Rick Manzi, who was heading the overall company's merchandising team on an interim basis, has returned to his previous post as VP-fresh merchandising.

In her return to Giant, Herring will oversee merchandising strategy and execution for the 161-store regional chain, which is the dominant retailer in the Baltimore-Washington market.

Herring began her grocery industry career with Safeway in 1991, staying for 24 years. In 2015, she joined Ahold as senior VP-non-perishables for Giant/Carlisle (now The Giant Com-

pany) and shifted to Landover in 2018 where she helped build a new organization from the ground up (when the Landover, MD-based regional chain switched to a decentralized platform in 2018 after the Ahold-Delhaize merger).

"We are very excited to have Tonya rejoin the Giant Food team as chief merchant," said Giant Food president Ira Kress. "She is an accomplished, well-respected leader with deep merchandising expertise. I would also like to thank Rick for his interim leadership of the merchandising organization. Rick and Tonya will serve as great partners in leading us to future success."



Tonya Herring



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TAKING STOCK

from page 55

Foods." Maybe Mackey was referring to the period right after the deal was consummated and Mackey had just gotten his big check. To be fair, Bezos left his post as head honcho nearly three years ago, but even before then, the folksy culture that permeated WFM was disappearing and today Whole Foods has become almost fully "Amazonized." It's still a very good merchant, just not as nearly at the top of its game as when Mackey was running it. It also should be noted that the enlightened one is currently peddling his new book - "The Whole Story"...Kraft Heinz is looking to sell its Oscar Mayer meat division and has enlisted Bank of America and investment banking firm Centerview Partners to assist with the transaction. A potential buyer (likely from the PE sector) could pay as much as an estimated \$5 billion for the company's iconic processed meat brand. But more importantly, from my perspective, I believe it's imperative that whoever acquires Oscar Mayer needs to ensure that the company's Wienermobile never goes away...recently I've written about how many start-up companies in the in all realms of the food universe are folding. Recently, we've seen the likes of Foxtrot, Gorillas, Boxed, Chef'd and Buyk go bankrupt or fail in the U.S. You can add Takeoff Technologies to that list. The tech firm, which builds automated micro-fulfillment centers and includes Wakefern, Albertsons and Hy-Vee as clients, filed for Chapter 11 bankruptcy protection earlier this month and plans to sell its assets (estimated at \$50 million). The Waltham, MA-based firm said it has been underperforming since the pandemic ended. It is seeking to gain court approval to keep operating until a buyer can be found. This is not only a continuing story of "too many cooks and not enough kitchens" but also the belt-tightening of private equity enterprises which currently are much less inclined to throw money at a concept rather than a business that demonstrates it can produce black ink.

Local Notes

Ahold Delhaize held its annual investor strategy meeting last month in Zaandam, The Netherlands and, after highlighting its "Growing Together" strategy, the buzz from the four-hour meeting was the future closing of some Stop & Shop store in New England and Metro New York. During his speech, ADUSA CEO JJ Fleeman would not specify how many Stoppie units would close in the upcoming months (we're hearing about 30), but noted that the Quincy, MA-based brand would focus on investing its capital in more densely populated areas where Stop & Shop has a leading market position. He also said that the big brand (second largest in the ADUSA portfolio with 397 stores) did not have a value proposition and a pricing structure that was strong enough. Fleeman went on to particularly praise the efforts of Food Lion and The Giant Company, which have both continued to show growth and the potential for greater future success. Ahold Delhaize chief executive Frans Muller said the retailer will continue to focus on technology as it looks to strengthen all aspects of its omnichannel abilities. The international merchant also noted that it plans to grow its private label presence in an attempt to reach 45 percent of total sales by 2028...more locally, I want to give a shout out to Tonya Herring who has returned to her old job of SVP-chief merchant for Giant Food. Tonya's spent the past couple of years working at sister ADUSA brand Peapod Digital Labs, which was recently folded into the larger ADUSA umbrella. Tonya's well respected by the vendors and much admired by the Giant associates. Also, to Rick Manzi, the company's VP-fresh who had ably expanded his duties to oversee all merchandising on an interim basis. Rick will continue to oversee fresh now that Tonya has returned. During the past month, the Landover, MD-based brand celebrated two store openings - a net new supermarket on Perring Parkway in Parkville, MD (a former Shoppers) and the grand re-opening of its bulwark Wilkens Avenue unit in Baltimore (which was also expanded by 10,000 square feet). As rampant retail shrink through theft continues to increase, Giant has banned all large bags (over 14"x14"x6" but not reusable shopping bags) in order to deter shoplifting. Harris Teeter, one of Giant's main competitors in the DC area has also altered its shrink deterrent policy and is now also banning large bags as well as checking receipts at its eight stores in the District. As I've noted previously, the solution to this grow-

TAKING STOCK continues on page 87

IN REVIEW: WEGMANS

State	County	2024 Stores	2024 Sales (in millions)	2024 County Food Sales	% of 2024 County Market	2023 Stores	2023 Sales (in millions)	% of 2023 County Market
DC	Washington	1	\$91.50	\$2,662.40	3.44%	1	\$90.70	3.47%
DC Recap: 1 store with sales of \$91.5 million. Total retail food sales for DC in the study: \$2.66 billion. Wegmans share of DC is 3.44%.								
MD	Anne Arundel	1	\$92.90	\$2,471.20	3.76%	1	\$92.60	3.72%
MD	Baltimore County	2	\$173.20	\$3,673.10	4.72%	2	\$171.50	4.73%
MD	Frederick	1	\$76.60	\$1,040.10	7.36%	1	\$76.40	7.53%
MD	Harford	1	\$97.60	\$1,127.10	8.66%	1	\$97.60	8.77%
MD	Howard	1	\$110.20	\$1,285.80	8.57%	1	\$109.50	8.62%
MD	Montgomery	1	\$99.70	\$4,010.20	2.49%	1	\$99.40	2.51%
MD	Prince George's	1	\$98.30	\$3,586.60	2.74%	1	\$98.30	2.87%
MD Recap: 8 stores with sales of \$748.5 million. Total retail food sales for MD in the study: \$23.18 billion. Wegmans share of MD is 3.23%.								
PA	Cumberland	1	\$61.70	\$1,249.60	4.94%	1	\$61.40	4.90%
PA	Lancaster	1	\$69.40	\$1,809.20	3.84%	1	\$69.00	3.65%
PA Recap: 2 stores with sales of \$131.1 million. Total retail food sales for PA in the study: \$7.17 billion. Wegmans share of PA is 1.83%.								
VA	Albemarle	1	\$75.80	\$716.10	10.59%	1	\$75.40	10.79%
VA	Chesterfield	1	\$67.10	\$1,710.90	3.92%	1	\$66.80	3.96%
VA	Fairfax	6	\$618.40	\$6,114.10	10.11%	6	\$621.50	10.36%
VA	Henrico	1	\$68.90	\$2,028.10	3.40%	1	\$68.70	3.39%
VA	Loudoun	2	\$196.40	\$1,677.10	11.71%	2	\$195.70	12.01%
VA	Prince William	2	\$226.50	\$2,169.60	10.44%	2	\$226.30	10.53%
VA	Spotsylvania	1	\$76.80	\$887.30	8.66%	1	\$76.50	8.93%
VA	Virginia Beach	1	\$73.10	\$1,831.90	3.99%	1	\$72.70	4.03%
VA Recap: 15 stores with sales of \$1.4 billion. Total retail food sales for VA in the study: \$26.65 billion. Wegmans share of VA is 5.27%.								

Mid-Atlantic Recap: 26 stores with sales of \$2.37 billion annually. Mid-Atlantic retail food sales total: \$61.3 billion. Wegmans Per Store Average: \$91.32 million

Source: Food World, June 2024



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IN REVIEW: TARGET

State	County	2024 Stores	2024 Sales (in millions)	2024 County Food Sales	% of 2024 County Market	2023 Stores	2023 Sales (in millions)	% of 2023 County Market
DC	Washington	5	\$104.80	\$2,662.40	3.94%	5	\$105.60	4.03%
DC Recap: 5 stores with sales of \$104.8 million. Total retail food sales for DC in the study: \$2.66 billion. Target share of DC is 3.94%.								
DE	Kent	1	\$19.10	\$561.70	3.40%	1	\$19.20	3.42%
DE Recap: 1 store with sales of \$19.1 million. Total retail food sales for DE in the study: \$1.64 billion. Target share of DE is 1.16%.								
MD	Anne Arundel	5	\$109.30	\$2,471.20	4.42%	5	\$111.60	4.48%
MD	Baltimore City	1	\$22.70	\$1,566.00	1.45%	1	\$23.20	1.47%
MD	Baltimore County	6	\$111.50	\$3,673.10	3.04%	6	\$112.30	3.09%
MD	Carroll	1	\$15.60	\$747.90	2.09%	1	\$15.80	2.19%
MD	Charles	2	\$30.00	\$624.80	4.80%	2	\$30.20	5.35%
MD	Frederick	1	\$17.10	\$1,040.10	1.64%	1	\$17.10	1.68%
MD	Harford	3	\$54.60	\$1,127.10	4.84%	3	\$54.90	4.93%
MD	Howard	2	\$45.30	\$1,285.80	3.52%	2	\$45.50	3.58%
MD	Montgomery	6	\$133.50	\$4,010.20	3.33%	6	\$134.20	3.39%
MD	Prince George's	8	\$218.40	\$3,586.60	6.09%	9	\$236.50	6.91%
MD	Queen Anne's	1	\$20.20	\$157.80	12.80%	1	\$20.40	12.45%
MD	St. Mary's	1	\$16.60	\$406.20	4.09%	1	\$16.90	4.50%
MD	Talbot	1	\$18.60	\$245.70	7.57%	1	\$18.80	7.71%
MD	Washington	1	\$15.20	\$579.60	2.62%	1	\$15.40	2.68%
MD	Wicomico	1	\$15.70	\$317.40	4.95%	1	\$15.90	4.99%
MD Recap: 40 stores with sales of \$844.3 million. Total retail food sales for MD in the study: \$23.18 billion. Target share of MD is 3.64%.								
PA	Cumberland	2	\$37.10	\$1,249.60	2.97%	2	\$37.20	2.97%
PA	Dauphin	2	\$31.10	\$1,103.00	2.82%	2	\$31.30	2.84%
PA	Franklin	1	\$18.30	\$468.80	3.90%	1	\$18.60	3.87%
PA	Lancaster	3	\$62.10	\$1,809.20	3.43%	3	\$62.40	3.30%
PA	Lebanon	1	\$18.80	\$461.30	4.08%	1	\$18.90	3.88%
PA	York	3	\$62.40	\$1,725.40	3.62%	3	\$62.70	3.62%
PA Recap: 12 stores with sales of \$229.8 million. Total retail food sales for PA in the study: \$7.17 billion. Target share of PA is 3.2%.								
VA	Albemarle	1	\$16.20	\$716.10	2.26%	1	\$16.30	2.33%
VA	Arlington	3	\$62.20	\$1,038.80	5.99%	3	\$62.40	5.92%
VA	Chesapeake City	3	\$32.70	\$983.60	3.32%	3	\$32.90	3.47%
VA	Chesterfield	5	\$70.50	\$1,710.90	4.12%	5	\$70.70	4.19%
VA	Culpeper	1	\$15.80	\$187.40	8.43%	1	\$15.90	8.66%
VA	Fairfax	10	\$245.50	\$6,114.10	4.02%	11	\$264.80	4.41%
VA	Frederick	2	\$28.90	\$561.90	5.14%	2	\$29.10	5.34%
VA	Hampton/Newport News	2	\$29.30	\$1,314.50	2.23%	2	\$29.60	2.22%
VA	Hanover	1	\$18.00	\$531.40	3.39%	1	\$18.10	3.51%
VA	Henrico	6	\$105.20	\$2,028.10	5.19%	6	\$106.50	5.26%
VA	James City	2	\$26.90	\$448.80	5.99%	2	\$27.10	5.99%
VA	Loudoun	3	\$64.80	\$1,677.10	3.86%	3	\$65.20	4.00%
VA	Norfolk City	1	\$15.00	\$846.80	1.77%	1	\$15.10	1.79%
VA	Orange	1	\$16.50	\$153.10	10.78%	1	\$16.80	11.34%
VA	Prince William (Super Target)	4	\$66.30	\$2,169.60	3.06%	4	\$66.90	3.11%
VA	Spotsylvania (Super Target)	2	\$35.60	\$887.30	4.01%	2	\$35.80	4.18%
VA	Stafford	2	\$37.90	\$456.30	8.31%	2	\$38.10	8.63%
VA	Virginia Beach	4	\$65.10	\$1,831.90	3.55%	4	\$65.40	3.63%
VA	Warren	1	\$18.00	\$173.50	10.37%	1	\$18.20	10.68%
VA Recap: 54 stores with sales of \$970.4 million. Total retail food sales for VA in the study: \$26.65 billion. Target share of VA is 3.64%.								

Mid-Atlantic Recap: 112 stores with sales of \$2.17 billion annually. Mid-Atlantic retail food sales total: \$61.3 billion.

Target Per Store Average: \$13.36 million () Indicates another banner used by the company.

Source: Food World, June 2024

DIRECTORY OF RETAILERS

From page 66

Primary Supplier: UNFI
FW Stores: 6
FW Vol.: \$68.2 million

Great Valu Supermarkets

8258 Richfood Rd.
Mechanicsville, VA 23116
Phone: (804) 746-6000
Web: greatvalu.com
Primary Supplier: UNFI
FW Stores: 7
FW Vol.: \$72.0 million
*This is the advertising and marketing arm that serves a group of independents that operate in the FW marketing area.

Grocery Outlet

5650 Hollis St.
Emeryville, CA 94608
Phone: (510) 845-1999
Web: groceryoutlet.com
Pres./CEO: RJ Sheedy
EVP-Chief Ops. Officer: Ramesh Chikkala
Primary Supplier: Direct
FW Stores: 19

FW Vol.: \$117.9 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
FW Stores: 78
FW Vol.: \$2.52 billion

Karns Quality Food Ltd.

675 Silver Spring Rd.
Mechanicsburg, PA 17050
Phone: (717) 766-6477
Web: karnsfoods.com
CEO/Pres.: Andrea Karns
Chairman: D. Scott Karns
Primary Supplier: UNFI
FW Stores: 10
FW Vol.: \$186.0 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
FW Stores: 37 (Includes Market-place)
FW Vol.: \$1.39 billion

Lidl U.S.

3500 S. Clark St.
Arlington, VA 22202
Phone: (571) 398-5435
Web: lidl.com
Pres./CEO Lidl US: Joel Rampoldt
COO-Lidl U.S.- Lee Galbraith
Primary Supplier: Direct
FW Stores: 61
FW Vol.: \$541.0 million

MOM's Organic Market

5566 Randolph Rd
Rockville, MD 20852
Phone: (301) 816-4944
Web: momsorganicmarket.com
CEO: Scott Nash
Primary Supplier: UNFI
FW Stores: 16

FW Vol.: \$259.4 million

Publix

3300 Publix Corporate Pkwy.
Lakeland, FL 33811
Phone: (863) 688-7407
Pres./CEO: Kevin Murphy
Charlotte, NC Div.:
4135 S. Stream Blvd., Ste. 500
Charlotte, NC 28217
Phone: (704) 424-5017
VP: Joey Riddle
Web: publix.com
Primary Supplier: Direct
FW Stores: 20
Area Vol: \$316.2 million

Redner's Markets Inc.

3 Quarry Rd.
Reading, PA 19605
Phone: (610) 926-3700
Web: rednersmarkets.com
Pres./CEO: Ryan Redner
COO: Gary M. Redner
VP-Procurement: Dan Eberhart
VP/General Counsel: Jason Hopp
VP-Finance: Richard Rabenold

See **DIRECTORY** on page 75



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Legislative Line

from page 60

more to the story but from the other side. Grocery prices, for the first time in a year, dropped in April (the latest reporting period by the Department of Labor). The index for food at home decreased by 0.2 percent for the month, while the food index overall was unchanged. In food categories, three of the commodities reporting groups recorded price decreases, and three went up. The index for meats, poultry, fish, and eggs declined 0.7 percent. The other two groups dropped in price for April were fruits and vegetables and nonalcoholic beverage. After some relief in March's reporting period which showed a 0.9 percent decrease in prices, cereal and bakery products were up 0.6 percent in April, while other food at home, dairy, and related products were up only 0.1 percent.

Also, retailers know that con-

sumers have been pulling back on food expenditures. National and local retailers are addressing this dilemma by rolling back prices and getting lots of positive publicity for their price reduction efforts....just ask Target, Walmart, Aldi, Giant Food, Amazon Fresh, etc.

All this makes me wonder "where is the beef"?

Lab-Grown Meat Products Banned

Talking about beef, two U.S. states and one European country are banning the manufacturing, selling, and distribution of cultivated cell-grown meat and poultry products. You may recall that I have previously mentioned that Italy enacted a ban last year and now Florida and Alabama are joining the ban on cell-grown meat. Concern has been growing as some naysayers say the experimental product lacks in-depth study to further explore its long-term health

consequences as well as threats to traditional animal agriculture. Debate continues around restricting production and regulating the labelling of lab-grown meat in three other states too—Arizona, Iowa, and Tennessee. Several other states previously introduced similar legislation to ban the sale of cultivated meat, but the legislation failed.

The Good Food Institute, a non-government organization, said in a statement about the Florida ban, that "this bill sends a terrible message to the investors, scientists, and entrepreneurs that have built America's global leadership in alternative proteins." They added that the Florida legislation has always been about helping one industry, "Big Ag," avoid accountability and competition. Ya think the cattle folks are a bit nervous about cell cultured meat even though the fed regulators approved the product for sale. You betcha! It is sad that there is a possibility that this new technology may not be available to everyone in the U.S. as well as throughout the world. As went the semiconductor in-

dustry in the U.S., so may cultivated cell-grown meat. Highly unlikely but I'm just sayin'.

New School Meal Standards

The Department of Agriculture has announced major steps to promote the health of America's children through school meals. Nutrition standards for school meals will be gradually updated to include less sugar and greater flexibility with menu planning between Fall 2025 and Fall 2027. The Department arrived at these changes after listening closely to public feedback and considering the latest science-based recommendations from the Dietary Guidelines for Americans Committee.

Use of Advisory Committees

The FDA and USDA often make recommendations to Congress via the utilization of advisory committees comprised of volunteers from the food industry and the public. Because of the importance of advisory committees to the legislative and rule-making process, FDA has just announced that the agency is taking the lead to review the current advisory committee process and is seeking input on whether there are ways they can better incorporate a variety of diverse perspectives and experiences, as well as consumer and industry viewpoints into advisory committee meetings.

The FDA is holding virtual listening sessions this month to consider how advisory committee policies and practices can be optimized. The agency plans to make new recommendations on the use of advisory committees this fall. Stay tuned.

Retail Food Protection Code

If you care about food safety and safeguarding the health and welfare of your customers, you need to be familiar with the Food and Drug Administration Food Code. The Food Code represents the FDA's best advice for a uniform system of provisions that address the safety and protection of food offered at retail. The Food Code is adopted by local, state, territorial, and federal

governmental jurisdictions for administration by the various departments that are charged with compliance responsibilities for food service, retail food stores, or food vending operations.

The 2022 Food Code is the most recent full edition published by FDA and was officially released on December 28, 2022. For more information, go to <https://www.fda.gov/retailfood-protection>.

Grocery Shopping IS A Labor Of Love

The folks at FMI recently released their 50th edition of U.S. Grocery Shopper Trends, which finds shoppers enjoy food shopping as much as ever. The analysis kicking off their 2024 series, U.S. Grocery Shopper Trends series; Finding Value, Online Shopping; and Eating & Cooking, provides a crucial snapshot of consumer behavior and sentiment in the most frequently purchased consumer category amid ongoing concerns about the impact of inflation on the cost of groceries.

You can explore FMI's three editions at www.FMI.org/GroceryTrends. The interesting information should be useful to your consumer affairs and marketing staff.

Finally - Did Ya Know?

Every 24 hours, 27,000 trees are cut down to make toilet paper. Want to find a way to save the planet? Well, the Honeycomb Company did just that by creating a luxury 3-ply toilet tissue made from bamboo. The firm said the new product feels just like regular quality toilet paper but does not harm trees.

Bamboo is the fastest-growing plant in the world – growing 100 times faster than the average tree, which means thousands of rolls can be produced in the time it takes for a single tree to grow back. Of course, it is biodegradable too. Good going Honeycomb! For more information, go to: concierge@honeycombluxury.com.

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

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G&S Foods Cuts Ribbon On New 350,000 Square Foot Hanover, PA Manufacturing Facility



Earlier this month, G&S Foods cut the ribbon on its new 350,000 square foot manufacturing facility in Hanover, PA. On hand for the festivities were members of the board, the executive team and other key contributors, including (l-r) Chuck Simon, retired; Christina Garcia, Tom Dempsey, Thomas Koppelman, president and CEO Dan Morgan, Patricia Warehime, Wade Fitzkee, chairman Charles "Ed" Good, Jeff Bailor, Peter Michaud, Travis Grim, Dena Sottile and Tony Hartlaub.



That's G&S' chief executive Dan Morgan (l) with executive assistant to the board and leadership team Dena Sottile.



This smiling trio consists of (l-r) Patricia Warehime (the inspiration behind building the new plant) and Tom Dempsey of G&S and Alec Sivel of Perspective, who ably handled all the public relations and communications for G&S.



Tony Hartlaub (l), G&S, and JoAnn Watz (r) flank Estelle King, wife of the late Rick King, who served as president of Utz Quality Foods for 20 years.



Representing the board of directors and Warehime family members are (l-r) Tom Dempsey, the former Utz president who served as G&S' CEO; Charles "Ed" Good; Kate Mininger, family member; Patricia Warehime; Elizabeth and Stavros Rizakos, family members; Peter Michaud and CEO Dan Morgan.

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DELAWARE COUNTY SHARE OF MARKET: 2024

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



KENT COUNTY (\$561.7 million) (Includes Dover, Harrington, Smyrna)

- Population 189,789
- # of Households 68,705
- Median Income \$69,278
- Under age 18 22.7%
- Over age 65 18.4%
- Female 51.7%
- White 58.0%
- Black 28.9%
- Hispanic 8.1%
- Asian 2.4%



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

- Population 263,509
- # of Households 99,858
- Median Income \$75,406
- Under age 18 17.4%
- Over age 65 30.8%
- Female 51.4%
- White 75.4%
- Black 11.6%
- Hispanic 9.7%
- Asian 1.4%

Rank	Company	Stores	Sales (in millions)	% of Market
1	Giant Food	3	\$178.20	16.53%
2	Food Lion	9	\$144.90	13.44%
3	Walmart (SuperCenter)	4	\$144.20	13.37%
4	Wawa	10	\$91.48	8.48%
5	Walgreens	13	\$74.30	6.89%
6	Redner's Markets	3	\$71.80	6.66%
7	Albertsons (Acme/Safeway)	2	\$68.90	6.39%
8	Weis Markets	3	\$60.31	5.59%
9	Royal Farm Stores	21	\$55.20	5.12%
10	BJ's Wholesale Club	1	\$44.20	4.10%
11	Harris Teeter	2	\$38.40	3.56%
12	CVS	6	\$32.90	3.05%
13	Rite Aid	10	\$31.20	2.89%
14	Aldi	3	\$30.80	2.86%
15	C&S Independents	5	\$13.90	1.29%
16	The Fresh Market	1	\$13.80	1.28%
17	Fas-Marts	7	\$11.40	1.06%
18	International Markets	1	\$9.80	0.91%
19	7-Eleven	2	\$7.10	0.66%
20	Save-A-Lot	1	\$5.20	0.48%
		107	\$1,127.99	104.62%*

() 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 2024



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DIRECTORY OF RETAILERS

From page 71

VP-Groc. Ops.: William Wallace
 VP-HR: Robert McDonough
 VP-IT: Nicholas Hidalgo
 Primary Supplier: UNFI
 FW Stores: 14
 FW Vol.: \$316.0 million

Roots Market

5808 Clarksville Square Rd.
 Clarksville, MD 21029
 Phone: (443) 535-9321
 Web: rootsmkt.com
 Owner: Jeff Kaufman
 FW Stores: 2
 FW Vol.: \$24.1 million

Save A Lot

400 Northwest Plaza Dr.
 St. Ann, MO 63074
 Phone: (314) 592-9100
 Web: savealot.com
 CEO: Fred Boehler
 Primary Supplier: Direct
 FW Stores: 31
 FW Vol.: \$190.3 million

Shoppers Food

Div. of UNFI
 16901 Melford Blvd., Ste. 300
 Bowie, MD 20715
 Phone: (301) 306-8600
 Web: shoppersfood.com
 CEO: Alexander "Sandy" Miller Douglas
 Div. VP/GM: Jeff Bleichner
 Primary Supplier: UNFI
 FW Stores: 25*
 FW Vol.: \$623.0 million
 *Shoppers closed three St. Mary's County stores after the market study measuring period ended on March 31, 2024.

ShopRite

5000 Riverside Dr.
 Keasby, NJ 08832
 Phone: (908) 527-3300
 Web: shoprite.com
 Chmn.: Sean McMenamin
 Pres.: Mike Stigers
 CFO: Neil Falcone
 EVP-Chief Sales Officer: Darren Caudill
 Pres.-Price Rite: Kevin McDonnell
 Pres.-ShopRite Supermarkets: Steve

Savas

FW Stores: 13 (Includes Price Rite)
 FW Vol.: \$408.2 million
 *This is the retail arm of wholesaler grocery co-op Wakefern Food Corp. All of the ShopRite stores are independently owned. Most of the Price Rite stores are corporately owned.

Sprouts

5455 E. High St., Ste. 111
 Phoenix, AZ 85054
 Phone: (480) 814-8016
 Web: sprouts.com
 CEO: Jack Sinclair
 CFO: Curtis Valentine
 Pres./COO: Nick Konat
 Chief Merch. Officer: Scott Neal
 Chief Stores Officer: Dustin Hamilton
 Chief Strategy Officer: Dave McGlinchey
 SVP/CMO: Alisa Gmelich
 SVP-Chief Forager.: Kim Coffin
 SVP-Supply Chain: Joe Hurley
 SVP-Real Estate: Dan Croce
 Primary Supplier: Direct/Kehe
 FW Stores: 8
 FW Vol.: \$150.7 million

Streets Market & Café

2400 14th St. NW
 Washington, DC 20009
 Phone: (202) 265-3300
 Web: streetsmarket.com
 VP: Campbell Burns
 Primary Supplier: UNFI
 FW Stores: 11
 FW Vol.: \$94.5 million

Trader Joe's

East Coast Div.
 160 Federal St., 12th Fl.
 Boston, MA 02108
 Phone: (857) 400-3400
 Web: traderjoes.com
 Chmn./CEO: Bryan Palbaum
 Pres.: John Basalone
 Supplier: Direct
 FW Stores: 33
 FW Vol.: \$864.4 million

Wegmans Food Markets, Inc.

1500 Brooks Ave.
 P.O. Box 30844
 Rochester, NY 14603-0844

See **DIRECTORY** on page 80

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IN REVIEW: WALGREENS

State	County	2024 Stores	2024 Sales (in millions)	2024 County Food Sales	% of 2024 County Market	2023 Stores	2023 Sales (in millions)	% of 2023 County Market
DC	Washington	10	\$77.40	\$2,662.40	2.91%	10	\$79.30	3.03%
DC Recap: 10 stores with sales of \$77.4 million. Total retail food sales for DC in the study: \$2.66 billion. Walgreens share of DC is 2.91%.								
DE	Kent	8	\$38.20	\$561.70	6.80%	8	\$38.80	6.92%
DE	Sussex	13	\$74.30	\$1,078.20	6.89%	14	\$79.10	7.33%
DE Recap: 21 stores with sales of \$112.5 million. Total retail food sales for DE in the study: \$1.64 billion. Walgreens share of DE is 6.86%.								
MD	Anne Arundel	16	\$64.90	\$2,471.20	2.63%	16	\$65.60	2.63%
MD	Baltimore City	19	\$141.70	\$1,566.00	9.05%	19	\$140.90	8.91%
MD	Baltimore County	27	\$170.80	\$3,673.10	4.65%	27	\$172.40	4.75%
MD	Calvert	2	\$11.60	\$434.50	2.67%	2	\$11.90	2.81%
MD	Caroline	1	\$6.00	\$104.40	5.75%	1	\$5.90	5.86%
MD	Carroll	3	\$18.70	\$747.90	2.50%	4	\$21.30	2.96%
MD	Cecil	3	\$14.00	\$322.80	4.34%	3	\$14.10	4.45%
MD	Charles	3	\$16.40	\$624.80	2.62%	3	\$16.20	2.87%
MD	Dorchester	1	\$6.00	\$71.60	8.38%	1	\$5.80	8.98%
MD	Frederick	5	\$28.50	\$1,040.10	2.74%	5	\$28.80	2.84%
MD	Harford	11	\$59.90	\$1,127.10	5.31%	11	\$59.70	5.36%
MD	Howard	4	\$23.80	\$1,285.80	1.85%	5	\$29.10	2.29%
MD	Kent/MD	2	\$22.10	\$102.20	21.62%	2	\$22.40	21.64%
MD	Montgomery	12	\$75.40	\$4,010.20	1.88%	13	\$78.30	1.98%
MD	Prince George's	11	\$68.60	\$3,586.60	1.91%	12	\$72.80	2.13%
MD	Queen Anne's	2	\$12.90	\$157.80	8.17%	2	\$12.90	7.87%
MD	St. Mary's	2	\$9.40	\$406.20	2.31%	3	\$12.30	3.28%
MD	Talbot	1	\$5.30	\$245.70	2.16%	1	\$5.30	2.17%
MD	Washington	3	\$16.60	\$579.60	2.86%	4	\$22.00	3.83%
MD	Wicomico	2	\$11.30	\$317.40	3.56%	2	\$11.00	3.45%
MD	Worcester	1	\$7.30	\$254.70	2.87%	1	\$7.00	2.90%
MD Recap: 131 stores with sales of \$791.2 million. Total retail food sales for MD in the study: \$23.18 billion. Walgreens share of MD is 3.41%.								
PA	Franklin	0	\$0.00	\$468.80	0.00%	1	\$6.30	1.31%
PA	Lancaster	1	\$5.70	\$1,809.20	0.32%	1	\$5.80	0.31%
PA	York	3	\$17.60	\$1,725.40	1.02%	3	\$17.90	1.03%
PA Recap: 4 stores with sales of \$23.3 million. Total retail food sales for PA in the study: \$7.17 billion. Walgreens share of PA is 0.32%.								
VA	Albemarle	2	\$10.80	\$716.10	1.51%	2	\$10.70	1.53%
VA	Arlington	5	\$36.30	\$1,038.80	3.49%	5	\$35.40	3.36%
VA	Caroline	1	\$5.00	\$44.20	11.31%	1	\$5.20	11.87%
VA	Chesapeake City	6	\$28.80	\$983.60	2.93%	6	\$28.60	3.02%
VA	Chesterfield	9	\$60.20	\$1,710.90	3.52%	9	\$59.90	3.55%
VA	Culpeper	2	\$13.10	\$187.40	6.99%	2	\$13.20	7.19%
VA	Dinwiddie	2	\$11.60	\$141.70	8.19%	2	\$11.80	8.23%
VA	Essex	1	\$5.50	\$73.80	7.45%	1	\$5.60	7.95%
VA	Fairfax	21	\$130.40	\$6,114.10	2.13%	21	\$129.40	2.16%
VA	Fauquier	2	\$11.20	\$196.80	5.69%	2	\$11.40	6.00%
VA	Frederick	3	\$17.20	\$561.90	3.06%	3	\$17.40	3.20%
VA	Gloucester	1	\$6.10	\$139.70	4.37%	1	\$5.80	4.26%
VA	Hampton/Newport News	8	\$53.40	\$1,314.50	4.06%	8	\$50.20	3.77%
VA	Hanover	3	\$16.70	\$531.40	3.14%	3	\$16.80	3.26%
VA	Henrico	16	\$105.20	\$2,028.10	5.19%	17	\$108.70	5.37%
VA	James City	1	\$7.40	\$448.80	1.65%	1	\$7.20	1.59%
VA	Lancaster	1	\$6.10	\$89.90	6.79%	1	\$6.10	6.88%
VA	Loudoun	10	\$55.90	\$1,677.10	3.33%	10	\$56.30	3.46%

IN REVIEW: WALGREENS

State	County	2024 Stores	2024 Sales (in millions)	2024 County Food Sales	% of 2024 County Market	2023 Stores	2023 Sales (in millions)	% of 2023 County Market
VA	Louisa	1	\$5.70	\$47.70	11.95%	1	\$5.70	11.97%
VA	New Kent	2	\$10.30	\$69.90	14.74%	2	\$10.40	16.56%
VA	Norfolk City	5	\$35.10	\$846.80	4.15%	5	\$33.70	4.00%
VA	Northampton	1	\$5.10	\$40.80	12.50%	1	\$5.10	12.17%
VA	Northumberland	1	\$5.10	\$22.60	22.57%	1	\$5.20	23.21%
VA	Portsmouth City	2	\$12.90	\$298.60	4.32%	2	\$12.80	4.29%
VA	Prince George	1	\$5.00	\$82.30	6.08%	1	\$5.10	6.23%
VA	Prince William	9	\$61.60	\$2,169.60	2.84%	9	\$60.50	2.81%
VA	Richmond	1	\$4.80	\$24.00	20.00%	1	\$4.80	19.92%
VA	Shenandoah	2	\$9.20	\$124.70	7.38%	2	\$9.40	7.65%
VA	Southampton	1	\$5.90	\$95.20	6.20%	1	\$5.50	5.64%
VA	Spotsylvania	4	\$26.60	\$887.30	3.00%	4	\$26.80	3.13%
VA	Suffolk City	3	\$15.70	\$345.00	4.55%	3	\$15.10	4.55%
VA	Virginia Beach	14	\$79.60	\$1,831.90	4.35%	14	\$71.10	3.95%
VA	Westmoreland	2	\$9.50	\$50.30	18.89%	2	\$9.60	19.12%
VA	York	2	\$12.80	\$203.90	6.28%	2	\$12.10	5.97%

VA Recap: 145 stores with sales of \$885.5 million. Total retail food sales for VA in the study: \$26.65 billion. Walgreens share of VA is 3.32%.

Mid-Atlantic Recap: 311 stores with sales of \$1.89 billion annually. Mid-Atlantic retail food sales total: \$61.3 billion.

Walgreens Per Store Average: \$6.78 million

Source: *Food World*, June 2024

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e: julio.c.botello@savealot.com
p: 314-592-9162

Wholesale Inquiries:
Greg Riggs
e: gregory.riggs@moranfoods.com
p: 314-592-9154



IN REVIEW: FOOD LION

State	County	2024 Stores	2024 Sales (in millions)	2024 County Food Sales	% of 2024 County Market	2023 Stores	2023 Sales (in millions)	% of 2023 County Market
DE	Kent	4	\$32.60	\$561.70	5.80%	4	\$32.30	5.76%
DE	Sussex	9	\$144.90	\$1,078.20	13.44%	9	\$146.80	13.61%
DE Recap: 13 stores with sales of \$177.5 million. Total retail food sales for DE in the study: \$1.64 billion. Food Lion share of DE is 10.82%.								
MD	Anne Arundel	5	\$71.70	\$2,471.20	2.90%	5	\$71.20	2.86%
MD	Baltimore County	6	\$63.20	\$3,673.10	1.72%	6	\$64.20	1.77%
MD	Caroline	2	\$22.30	\$104.40	21.36%	2	\$21.90	21.75%
MD	Carroll	3	\$45.30	\$747.90	6.06%	3	\$45.20	6.28%
MD	Cecil	3	\$35.60	\$322.80	11.03%	3	\$35.20	11.10%
MD	Charles	3	\$43.90	\$624.80	7.03%	3	\$43.50	7.70%
MD	Dorchester	1	\$12.50	\$71.60	17.46%	1	\$13.50	20.90%
MD	Frederick	5	\$75.70	\$1,040.10	7.28%	5	\$75.00	7.39%
MD	Harford	2	\$11.10	\$1,127.10	0.98%	2	\$10.90	0.98%
MD	Howard	2	\$23.50	\$1,285.80	1.83%	2	\$23.20	1.83%
MD	Kent	1	\$16.40	\$102.20	16.05%	1	\$16.10	15.56%
MD	Montgomery	1	\$12.20	\$4,010.20	0.30%	1	\$11.80	0.30%
MD	Prince George's	3	\$42.60	\$3,586.60	1.19%	3	\$42.30	1.24%
MD	Queen Anne's	2	\$25.10	\$157.80	15.91%	2	\$24.90	15.19%
MD	Somerset	2	\$28.40	\$48.30	58.80%	2	\$28.10	60.82%
MD	St. Mary's	2	\$32.20	\$406.20	7.93%	2	\$31.80	8.48%
MD	Washington	1	\$11.60	\$579.60	2.00%	1	\$11.50	2.00%
MD	Wicomico	4	\$40.10	\$317.40	12.63%	4	\$40.30	12.65%
MD	Worcester	4	\$61.80	\$254.70	24.26%	4	\$63.10	26.12%
MD Recap: 52 stores with sales of \$675.2 million. Total retail food sales for MD in the study: \$23.18 billion. Food Lion share of MD is 2.91%.								
PA	Franklin	1	\$11.50	\$468.80	2.45%	1	\$11.40	2.37%
PA	York	1	\$5.20	\$1,725.40	0.30%	1	\$5.20	0.30%
PA Recap: 2 stores with sales of \$16.7 million. Total retail food sales for PA in the study: \$7.17 billion. Food Lion share of PA is 0.23%.								
VA	Accomack	2	\$34.70	\$104.50	33.21%	2	\$34.10	33.50%
VA	Albemarle	6	\$68.90	\$716.10	9.62%	6	\$68.40	9.78%
VA	Caroline	2	\$18.00	\$44.20	40.72%	2	\$17.80	40.64%
VA	Chesapeake City	12	\$157.20	\$983.60	15.98%	12	\$154.70	16.33%
VA	Chesterfield	17	\$224.10	\$1,710.90	13.10%	17	\$222.70	13.19%
VA	Dinwiddie	4	\$40.90	\$141.70	28.86%	4	\$40.80	28.45%
VA	Essex	1	\$12.70	\$73.80	17.21%	1	\$12.60	17.90%
VA	Fairfax	2	\$32.10	\$6,114.10	0.53%	2	\$31.80	0.53%
VA	Fauquier	3	\$25.30	\$196.80	12.86%	3	\$25.10	13.21%
VA	Gloucester	2	\$24.30	\$139.70	17.39%	2	\$24.20	17.75%
VA	Goochland	3	\$37.40	\$47.70	78.41%	3	\$36.90	78.01%
VA	Greene	1	\$10.80	\$17.60	61.36%	1	\$10.60	59.89%
VA	Hampton/Newport News	16	\$306.80	\$1,314.50	23.34%	16	\$298.70	22.43%
VA	Hanover	6	\$76.10	\$531.40	14.32%	6	\$75.20	14.58%
VA	Henrico	14	\$207.30	\$2,028.10	10.22%	14	\$205.10	10.13%
VA	Isle of Wight	3	\$36.90	\$101.80	36.25%	3	\$36.70	35.09%
VA	James City	5	\$63.50	\$448.80	14.15%	5	\$63.10	13.94%
VA	King George	2	\$28.20	\$102.50	27.51%	2	\$27.90	26.88%
VA	King William	2	\$31.90	\$40.60	78.57%	2	\$31.60	79.60%
VA	Lancaster	1	\$15.80	\$89.90	17.58%	1	\$15.60	17.61%
VA	Loudoun	3	\$41.50	\$1,677.10	2.47%	3	\$41.70	2.56%
VA	Louisa	2	\$23.40	\$47.70	49.06%	2	\$22.90	48.11%
VA	Madison	1	\$14.90	\$15.10	98.68%	1	\$14.80	98.67%
VA	Mathews	1	\$15.10	\$15.30	98.69%	1	\$14.90	97.39%
VA	Middlesex	1	\$15.30	\$28.50	53.68%	1	\$15.10	43.39%
VA	New Kent	4	\$52.90	\$69.90	75.68%	4	\$52.60	83.76%
VA	Norfolk City	8	\$144.30	\$846.80	17.04%	8	\$140.70	16.71%

IN REVIEW: FOOD LION

State	County	2024 Stores	2024 Sales (in millions)	2024 County Food Sales	% of 2024 County Market	2023 Stores	2023 Sales (in millions)	% of 2023 County Market
VA	Northampton	2	\$22.90	\$40.80	56.13%	2	\$22.80	54.42%
VA	Northumberland	1	\$14.80	\$22.60	65.49%	1	\$14.60	65.18%
VA	Orange	3	\$31.20	\$153.10	20.38%	3	\$30.90	20.85%
VA	Page	2	\$12.20	\$74.20	16.44%	2	\$12.10	16.88%
VA	Portsmouth City	5	\$78.00	\$298.60	26.12%	5	\$77.60	26.01%
VA	Powhatan	2	\$24.90	\$82.90	30.04%	2	\$24.80	30.92%
VA	Prince George	2	\$22.90	\$82.30	27.83%	2	\$22.70	27.72%
VA	Prince William	9	\$142.30	\$2,169.60	6.56%	9	\$140.90	6.56%
VA	Richmond	1	\$14.80	\$24.00	61.67%	1	\$14.70	61.00%
VA	Shenandoah	3	\$45.30	\$124.70	36.33%	3	\$44.90	36.56%
VA	Southampton	2	\$31.70	\$95.20	33.30%	2	\$31.50	32.31%
VA	Spotsylvania	1	\$12.90	\$887.30	1.45%	1	\$12.80	1.49%
VA	Suffolk City	5	\$52.40	\$345.00	15.19%	5	\$51.80	15.59%
VA	Virginia Beach	21	\$272.10	\$1,831.90	14.85%	21	\$270.50	15.01%
VA	Westmoreland	2	\$28.20	\$50.30	56.06%	2	\$28.10	55.98%
VA	York	4	\$51.10	\$203.90	25.06%	4	\$50.90	25.10%

VA Recap: 189 stores with sales of \$2.62 billion. Total retail food sales for VA in the study: \$26.65 billion. Food Lion share of VA is 9.98%.

Mid-Atlantic Recap: 256 stores with sales of \$3.49 billion annually. Mid-Atlantic retail food sales total: \$61.3 billion.

Food Lion Per Store Average: \$13.62 million

Source: *Food World*, June 2024

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¹⁾ Circana/IRI Standard-Food: NE Region P/E 3/24/24
²⁾ 8451 Stratum Research: L52 2/17/24

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DIRECTORY OF RETAILERS

From page 75

Phone: (585) 328-2550
Web: wegmans.com
Chmn.: Danny Wegman
Pres./CEO: Colleen Wegman
Primary Supplier: Direct
FW Stores: 26
FW Vol.: \$23.7 billion

Weis Markets, Inc.

1000 S. 2nd St.
Sunbury, PA 17801
Phone: (570) 286-4571
Web: weismarkets.com
Chmn./Pres./CEO: Jonathan Weis
COO: Kurt Schertle
SVP/CFO/Treasurer:
Michael Lockhard
SVP-HR: Jim Marcil
SVP-Operations: David Gose
SVP-Merch./Marketing: Bob Gleeson
SVP/CIO: Greg Zeh
Primary Supplier: Direct
FW Stores: 96
FW Vol.: \$2.03 billion

Whole Foods Market

Div. of Amazon
Northeast Div.
Harborside 3
210 Hudson St., Ste 700L
Jersey City, NJ 07311
Phone: (201) 567-2090
CEO: Jason Buechel
SVP-Northeast Ops: Nicole Davia
FW Stores: 43 (includes Amazon
Fresh)
Area Vol: \$1.52 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
FW Stores: 612
FW Vol.: \$3.7 billion
*Includes both stand-alone stores and pharmacies within Target locations.

Rite Aid

1200 Intrepid Ave., 2nd Fl.
Philadelphia, PA 19112
Phone: (717) 761-2633
Web: riteaid.com
CEO: Jeffrey Stein
FW Stores: 123
FW Vol.: \$452.1 million

Walgreens

200 Wilmot Rd.
Deerfield, IL 60015
Phone: (847) 940-2500
Web: walgreens.com
CEO: Tim Wentworth
FW Stores: 311
FW Vol.: \$1.89 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
FW Stores: 1,198
FW Vol.: \$2.96 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
FW Stores: 18
FW Vol.: \$40.8 million

Dash In

Div. of The Wills Group
102 Centennial St.
La Plata, MD 20646
Phone: (301) 932-3600
Chmn./CEO: Julian B. Wills III
Web: dashin.com
Primary Supplier: McLane
FW Stores: 44
FW Vol.: \$94.0 million

Fas Mart/Shore Shop Stores

Div. of GPM Investments
8565 Magellan Pkwy., Ste. 400
Richmond, VA 23227
Phone: (804) 730-1568
Web: gpminvestments.com
CEO: Arie Kotler
Primary Supplier: McLane
FW Stores: 86
FW Vol.: \$161.4 million

High's of Baltimore, LLC

Div. of Carroll Independent Fuel Co.
2700 Loch Raven Rd.
Baltimore, MD 21218
Phone: (410) 859-3636
Web: highs.com
Pres.: John Phelps

Primary Supplier: Liberty
FW Stores: 52
FW Vol.: \$93.9 million

Miller Marts

Div. of Global Partners IIc
800 South St., Ste. 500
Waltham, MA 02453
Phone: (781) 894-8800
Web: gotomillers.com
Primary Supplier: Davenport
FW Stores: 30
FW Vol.: \$58.1 million

Royal Farms

3611 Roland Ave.
Baltimore, MD 21211
Phone: (410) 889-0200
Web: royalfarms.com
Pres.: John Kemp
Primary Supplier: Cooper Booth
FW Stores: 256
FW Vol.: \$778.8 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
FW Stores: 72
FW Vol.: \$160.6 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
FW Stores: 166
FW Vol.: \$705.8 million

Turkey Hill Minit Markets

Div. of EG Group
165 Flanders Rd.
Westborough, MA 01581
Phone: (800) 225-9702
Web: turkeyhillcstores.com
Pres.: John Carey
Primary Supplier: Core-Mark
FW Stores: 112
FW Vol.: \$179.1 million

Wawa, Inc.

Red Roof, 260 W. Baltimore Pike
Wawa, PA 19063
Phone: (610) 358-8000
Web: wawa.com

CEO: Chris Gheysens
Primary Supplier: McLane/Direct
FW Stores: 191
FW Vol.: \$1.5 billion

WHOLESALE CLUBS

BJ's Wholesale Club

350 Campus Dr.
Westborough, MA 01752
Phone: (774) 512-7400
Web: bjs.com
CEO: Bob Eddy
FW Stores: 30
FW Vol.: \$1.19 billion (grocery/ HBC only)

Costco

Northeast Div.
45940 Horseshoe Dr., Ste. 150
Sterling, VA 20166
Phone: (703) 406-6800
Web: costco.com
Pres./CEO: Ron Vachris
Northeast Div. SVP/GM: Adam Self
FW Stores: 30
FW Vol.: \$2.07 billion (grocery/HBC only)

Sam's Club

2101 SE Simple Savings Dr.
Bentonville, AR 72716
Phone: (479) 273-4000
Web: samsclub.com
CEO/Pres.: Chris Nicholas
FW Stores: 26
FW Vol.: \$1.13 billion (grocery/HBC only)

MASS MERCHANDISERS

Target

1000 Nicollet Mall
Minneapolis, MN 55402
Phone: (612) 304-6073
Web: target.com
CEO: Brian Cornell
FW Stores: 112 (Includes Super Target)
FW Vol.: \$2.17 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
FW Stores: 158 (includes SuperCenter/Neighborhood Mkt.)
FW Vol.: \$6.33 billion (grocery/HBC only)

FOOD WORLD MARKET STUDY: RULES & ANALYSIS

from page 13

Rite Aid. The now-bankrupt drug chain closed nearly half of its 50 stores from a year ago. And while competitors CVS and Walgreens didn't open any new stores over the past 12 months, both gained share at Rite Aid's expense. Additionally, while it did not yet qualify to be among the market leaders in the Tidewater area, it's worth noting that Publix opened its second supermarket in the region late last year (its first was the former Ukrop's and Martin's store in Williamsburg in 2018). With the debut of its Suffolk store, and future stores planned for Virginia Beach, Chesapeake and Carrollton to debut in the next three years, look for the most profitable grocery chain in the country to become a factor in an already-overstuffed market.

How We Do It

This is the 46th 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, 2023 through March 31, 2024.

To qualify for inclusion in the study, supermarkets must operate at least two stores, and convenience stores must have at least 19 corporate units (al-

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

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

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

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

Sales data for military commissaries is publicly available.

For retailers that will not give us their volumes directly, we employ a number of sources: former and present employees, vendors familiar with specific accounts, and outside consultants. We use consultants primarily in collecting data about the mass and club channels. Our volume factoring system includes total sales produced by supermarkets, as well as 100 percent of sales recorded by drug chains, military 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 continue to skew more heavily toward grocery, drug, health and beauty care and general merchandise (HBC and GM), we now factor in that

62 percent of sales at Walmart's 94 SuperCenters in the region are derived from grocery, drug, HBC and GM. For the 65 conventional Walmart ("Division One") discount stores remaining in the market, we utilize an extrapolated percentage of 47 percent of total store sales. We continue to include 100 percent of Walmart's Neighborhood store sales. This year, Walmart opened no new stores and closed a store in Washington, DC, essentially putting an end to the "Behemoth's" aggressive expansion effort in DC that began in 2013. Another Walmart closed in in Towson, MD after our market study measuring period ended.

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

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

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

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

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Co., Inc., and any representation of 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 full-time team consists of Terri Maloney, VP-editorial director; Maria Maggio, VP-general manager of Food Trade News; and Kevin Gallagher, VP-Metro New York and New England.

As it's been for many years, there's one person who remains the glue for these large and data-driven issues. That's Terri Maloney - without her diligence and an unbelievable work ethic, the process would be much more difficult and frustrating. In her 24 years as editor (she has been with Best-Met for 35 years), Terri has piloted every aspect of the grueling Market Study which includes data collection (involving hundreds of changes each year), IT throughput, pre-press coordination, proofreading and printer communication.

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

Our pre-press and graphics team of Jenny Jones and her boss Matt Danielson at E-Ink, who we have partnered with us for nearly 30 years, continue to do a stellar job of helping get the final product ready for all three of our publications - Food World, Food Trade News and our annual Grocery Industry Directory.

Kudos, too, to our printer - Evergreen Printing in Bellmawr, NJ - another entrepreneurial enterprise that prioritizes customer service and quality. We salute Thom Scirrotto, Mike

McBain, Chris Geimer, Tanya Erickson and the entire Evergreen team for their continued good work.

Also, gratitude goes out to Beth Pripstein, our retired office and circulation manager, remains a valued associate, even on a part-time basis. To Barry Scher, the former Giant Food public affairs VP, who has written his "Legislative Line" column for many years and continues to make important contributions not only to Best-Met Publishing but also to many other philanthropic and fund-raising efforts. 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 51st year of reporting about the grocery industry. It's been a long run and for that I am grateful. Change now seems to occur at a faster level each year and it seems that we're all challenged just to keep pace.

As for Best-Met Publishing, can we continue to publish products that remain relevant and interesting to a changing audience? The template of the food business remains fundamentally unchanged. It's still about selling more stuff and treating your associates and others that you deal with fairly (a smile helps, too). It's the journey to the end zone that's evolved. Figuring out the path will be our hardest test.

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



Jeff Metzger
Publisher

Eastern Shore Supermarket Leaders

- Food Lion Ups Share Slightly
- Albertsons Sales Flat In Delmarva
- Giant Is Per-Store Avg. Leader
- Aldi Opens 4 New Stores
- Uncertain Economy Impacts All

Rank	Company	2024 Stores	2024 Sales (in millions)	% of 2024 Market	2023 Stores	2023 Sales (in millions)	% of 2023 Market
1	Food Lion	33	\$441.70	30.14%	33	\$443.90	30.13%
2	Albertsons (Acme/Safeway)	10	\$292.50	19.96%	10	\$291.40	19.78%
3	Giant Food	4	\$216.90	14.80%	4	\$222.20	15.08%
4	Redner's Markets	7	\$174.80	11.93%	7	\$177.50	12.05%
5	Aldi	11	\$108.30	7.39%	7	\$67.30	4.57%
6	Weis Markets	4	\$70.82	4.83%	4	\$71.85	4.88%
7	Harris Teeter	3	\$66.70	4.55%	3	\$71.00	4.82%
8	International Markets	2	\$20.70	1.41%	2	\$20.60	1.40%
9	C&S Independents	12	\$15.75	1.07%	11	\$15.88	1.08%
10	Save A Lot	3	\$14.10	0.96%	3	\$16.80	1.14%
		89	\$1,422.27	97.06%	84	\$1,398.43	94.92%

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

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

Source: Food World, June 2024

Thank You

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

Wegmans
Food Markets

Eastern Shore Market Leaders

- Alts. Share Now At 52.8%
- Walmart Produces Best Comps
- Drug Chains Slip More: Share At 11.5%
- Royal Farms, 7-Eleven Open Units
- Club Stores Control 5.5%

Rank	Company	2024 Stores	2024 Sales (in millions)	% of 2024 Market	2023 Stores	2023 Sales (in millions)	% of 2023 Market
1	Walmart (SuperCenter)	14	\$527.80	17.10%	14	\$505.20	16.48%
2	Food Lion	33	\$441.70	14.31%	33	\$438.70	14.28%
3	Albertsons (Acme/Safeway)	10	\$292.50	9.47%	10	\$291.40	9.51%
4	Giant Food	4	\$216.90	7.03%	4	\$222.20	7.25%
5	Wawa	24	\$216.04	7.00%	23	\$200.71	6.55%
6	Walgreens	32	\$188.50	6.11%	33	\$193.30	6.31%
7	Redner's Markets	7	\$174.80	5.66%	7	\$177.50	5.79%
8	Royal Farm Stores	60	\$167.30	5.42%	59	\$158.00	5.15%
9	Aldi	11	\$108.30	3.51%	7	\$67.30	2.20%
10	CVS	17	\$90.70	2.94%	18	\$98.20	3.20%
11	Sam's Club	2	\$88.50	2.87%	2	\$87.80	2.86%
12	BJ's Wholesale Club	2	\$82.50	2.67%	2	\$81.80	2.67%
13	Rite Aid	22	\$76.70	2.48%	28	\$102.20	3.33%
14	Target	4	\$73.60	2.38%	4	\$74.30	2.42%
15	Weis Markets	4	\$70.82	2.29%	4	\$71.85	2.34%
16	Harris Teeter	3	\$66.70	2.16%	3	\$71.00	2.32%
17	Fas-Marts	36	\$64.00	2.07%	39	\$66.10	2.16%
18	7-Eleven	20	\$54.40	1.76%	19	\$49.10	1.60%
19	International Markets	2	\$20.70	0.67%	2	\$20.60	0.67%
20	C&S Independents	12	\$15.75	0.51%	11	\$15.88	0.52%
		319	\$3,038.21	98.41%	322	\$2,998.34	97.81%

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 81. Petroleum sales are not included. Counties/cities included are: Kent and Sussex in DE; Caroline, Dorchester, Kent, Queen Anne's, Somerset, Talbot, Wicomico and Worcester in MD; and Accomack and Northampton in VA. () Indicates another banner used by the company.

Total food sales for the area are \$3.09 billion.

Source: Food World, June 2024



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Jersey Fresh is a program of the New Jersey Department of Agriculture | Philip D. Murphy, Governor | Edward D. Wengryn, Secretary of Agriculture



Central Pennsylvania Supermarket Leaders

- The Giant Company Share: 54.7%
- Weis Share Grows To 20.4%
- Karns Names New CEO
- Little Overall Growth In CPA
- Wegmans Avg. Volume: \$65.6M

Rank	Company	2024 Stores	2024 Sales (in millions)	% of 2024 Market	2023 Stores	2023 Sales (in millions)	% of 2023 Market
1	The Giant Co. (Martin's)	52	\$2,421.50	54.66%	52	\$2,413.40	53.93%
2	Weis Markets	38	\$905.54	20.44%	38	\$886.88	19.82%
3	Karns Prime & Fancy Foods	10	\$186.00	4.20%	10	\$188.00	4.20%
4	Aldi	15	\$138.90	3.14%	15	\$136.10	3.04%
5	Wegmans	2	\$131.10	2.96%	2	\$130.40	2.91%
6	Family Owned Markets	6	\$106.13	2.40%	7	\$125.81	2.81%
7	Grocery Outlet	12	\$78.90	1.78%	12	\$79.60	1.78%
8	C&S Independents	48	\$68.77	1.55%	50	\$73.34	1.64%
9	Redner's Markets	3	\$52.70	1.19%	3	\$52.40	1.17%
10	IGA	5	\$48.34	1.09%	5	\$47.85	1.07%
		191	\$4,137.88	93.40%	194	\$4,133.78	93.29%

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 \$4.43 billion.

Source: Food World, June 2024



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Central Pennsylvania Market Leaders

- Alts. Stymied By Supers, Share Is 35%
- TGC Now Owns 33.8% Of Market
- WM, Target Control 14.75%
- Led By Sheetz, C-Stores Take 7.25%
- By Attrition, CVS Is Top Drug Chain

Rank	Company	2024 Stores	2024 Sales (in millions)	% of 2024 Market	2023 Stores	2023 Sales (in millions)	% of 2023 Market
1	The Giant Co. (Martin's)	52	\$2,421.50	33.76%	52	\$2,413.40	33.02%
2	Weis Markets	38	\$905.54	12.62%	38	\$886.88	12.13%
3	Walmart (SuperCenter)	20	\$828.50	11.55%	20	\$786.40	10.76%
4	CVS	72	\$355.20	4.95%	72	\$357.30	4.89%
5	Sheetz	71	\$301.00	4.20%	72	\$300.70	4.11%
6	Target	12	\$229.80	3.20%	12	\$231.10	3.16%
7	Karns Prime & Fancy Foods	10	\$186.00	2.59%	10	\$188.00	2.57%
8	Sam's Club	4	\$181.60	2.53%	4	\$179.10	2.45%
9	Turkey Hill	112	\$179.10	2.50%	118	\$187.50	2.57%
10	Rite Aid	50	\$172.50	2.40%	60	\$210.10	2.87%
11	Rutter's Farm Stores	69	\$148.50	2.07%	69	\$144.50	1.98%
12	Aldi	15	\$138.90	1.94%	15	\$136.10	1.86%
13	Wegmans	2	\$131.10	1.83%	2	\$130.40	1.78%
14	BJ's Wholesale Club	4	\$121.90	1.70%	4	\$120.70	1.65%
15	Family Owned Markets	6	\$106.13	1.48%	7	\$125.81	1.72%
16	Costco	2	\$94.70	1.32%	2	\$93.70	1.28%
17	Grocery Outlet	12	\$78.90	1.10%	12	\$79.60	1.09%
18	7-Eleven	27	\$70.50	0.98%	26	\$67.40	0.92%
19	C&S Independents	48	\$68.77	0.96%	50	\$73.34	1.00%
20	Redner's Markets	3	\$52.70	0.73%	3	\$52.40	0.72%
		629	\$6,772.84	94.42%	648	\$6,764.43	93.54%

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 81. Petroleum sales are not included. Counties/cities included are: Adams, Cumberland, Dauphin, Franklin, Lancaster, Lebanon, Perry and York. () Indicates another banner used by the company.

Total food sales for the area are \$7.17 billion.

Source: Food World, June 2024

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TAKING STOCK

from page 68

ing issue is complicated. Clearly, physically confronting shoplifters is a bad idea, and the use of in-store security and the addition of facial recognition AI technology used by some retailers has been helpful, but the best long-term solution can only come from improved legislation, especially in lowering the dollar threshold to trigger a felony...Chesapeake, VA-based Dollar Tree announced that it is conducting a strategic review of its stumbling Family Dollar business which it acquired in 2015 for \$9 billion. Earlier this year, Family Dollar closed 970 stores and it continues to underperform as a whole. These strategic reviews usually lead to a sale; however, with more than 16,000 Family Dollar stores, good luck finding a buyer in this environment...a tip of the hat to Andrea and Scott Karns of Karns Foods. For Andrea, her elevation to CEO of the family-owned 10-store independent based in Mechanicsburg, PA, is much deserved after serving in all aspects of the business since she was a teenager. Also, to her father Scott, who moves up to chairman, and deserves much credit for growing the business to such a successful level after he took over from his dad and founder, David. Scott also gets high marks for having the wisdom to appoint his daughter to succeed him. The Karns are truly a great family who have built one of the best independent retail food businesses in the Mid-Atlantic...we have several obituaries to pass along this month including Dabney Coleman, the great comedic character actor who has left us at the age of 92. Coleman had many great supporting roles in such movies as "9 to 5" (1980) and "Tootsie" (1982). However, he cut his teeth on TV beginning in the early 1960s. I first noticed him playing unrepentant con man Merle Jeeter in the satirical TV series "Mary Hartman, Mary Hartman" (1976) and later as the star of his own series, the short-lived but very funny "Buffalo Bill" (1983). *Rolling Stone* once described his character, Bill Bittinger, as a "rapscallion for our times, a playfully wicked combination of G. Gordon Liddy and Groucho Marx." That description could fit many of the snarly roles that Coleman played during a career that spanned 58 years and included 180 film and TV roles. What better compliment can you offer than "he made me laugh"?... we've just lost two of the best basketball players of all-time. Just before presstime, we learned of the passing of Jerry West, 86, the 14-time NBA All-Star who was also a two-time All American at West Virginia University in the late 1950's. His professional accolades include being a 10-time All-NBA selection with the Los Angeles Lakers, scoring leader in 1970, MVP of the NBA Finals in 1969 (in which the Lakers lost) and Hall of Fame member. His number "44" has been retired by the Lakers. West finished his career with 25,192 points and 6,238 assists and averaged 27.8 points per game in his great career. After he retired as a player, West became a very successful general manager of the Lakers and later the San Diego (now Los Angeles) Clippers. Among his executive moves was drafting Kobe Bryant and trading for Shaquille O'Neal. All you really need to know about Jerry West's image is that his nickname was "Mr. Clutch," and it is his silhouette that served as the model for the NBA logo. Also passing on was Bill Walton. Although he wasn't the pro player that West was, Walton's college career was arguably more dominant than Mr. Clutch's. Walton's UCLA teams of the early 1970s won two national championships (under the tutelage of the great John Wooden) and at one point won an amazing 88 consecutive games. He was a three-time college "player of the year." As a pro, he was the first overall draft pick by the Portland Trailblazers in 1974 and three years later won his first NBA championship. But injuries, particularly foot ailments, hampered his career. A great rebounder and highly skilled passer, in the twilight of his career, Walton again found glory as a key reserve on the 1986 Boston Celtics team that would win the league championship. For his efforts, he received the NBA's "Sixth Man of the Year" award. After retiring, Walton turned to broadcasting where he primarily worked college games. His over-the-top description of players and playing styles was not everybody's cup of tea, but I personally admired his bluntness and stream of consciousness style. Additionally, he knew more about the Grateful Dead than any other sports personality ever - and that's a good thing. Bill Walton was 71 when he passed.

Keeping it Close to Home

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

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- Outstanding service

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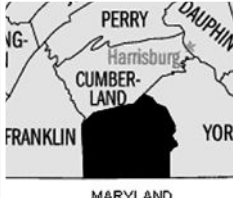


rednersmarkets.com

PENNSYLVANIA COUNTY SHARE OF MARKET: 2024

Total sales for those Pennsylvania counties included in the study are \$7.17 billion


Rank	Company	Stores	Sales (in millions)	% of Market
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ADAMS COUNTY (\$233.2million)
(Includes Gettysburg, Littlestown)

- Population 106,748
- # of Households 40,006
- Median Income \$78,975
- Under age 18 19.1%
- Over age 65 21.8%
- Female 50.3%
- White 88.3%
- Black 2.2%
- Hispanic 7.4%
- Asian 0.9%

1	The Giant Co.	1	\$66.00	28.30%
2	Weis Markets	2	\$42.93	18.41%
3	IGA	3	\$31.72	13.60%
4	Walmart	1	\$25.10	10.76%
5	Sheetz	4	\$19.10	8.19%
6	Rutter's Farm Stores	4	\$9.80	4.20%
7	7-Eleven	3	\$7.90	3.39%
8	Rite Aid	2	\$6.10	2.62%
9	Royal Farm Stores	2	\$6.10	2.62%
10	CVS	1	\$5.70	2.44%
11	Turkey Hill	2	\$3.80	1.63%
12	C&S Independents	1	\$0.44	0.19%
		26	\$224.69	96.35%




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

- Population 270,738
- # of Households 104,053
- Median Income \$82,849
- Under age 18 20.2%
- Over age 65 19.1%
- Female 50.0%
- White 81.9%
- Black 5.5%
- Hispanic 5.1%
- Asian 5.9%

1	The Giant Co.	10	\$494.90	39.60%
2	Walmart (SuperCenter)	4	\$131.80	10.55%
3	Weis Markets	5	\$111.25	8.90%
4	Karns Prime & Fancy Foods	4	\$75.00	6.00%
5	Wegmans	1	\$61.70	4.94%
6	CVS	12	\$56.50	4.52%
7	Sheetz	13	\$52.30	4.19%
8	BJ's Wholesale Club	1	\$40.80	3.27%
9	Aldi	4	\$38.70	3.10%
10	Target	2	\$37.10	2.97%
11	Sam's Club	1	\$35.30	2.82%
12	Rite Aid	7	\$29.60	2.37%
13	Trader Joe's	1	\$20.10	1.61%
14	Grocery Outlet	2	\$14.60	1.17%
15	7-Eleven	5	\$13.00	1.04%

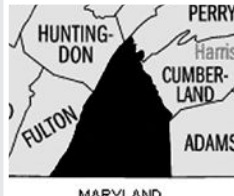
16	Turkey Hill	7	\$11.60	0.93%
17	Rutter's Farm Stores	5	\$11.50	0.92%
18	Military Commissaries	1	\$10.70	0.86%
		85	\$1,246.45	99.75%



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

- Population 289,234
- # of Households 117,907
- Median Income \$71,046
- Under age 18 22.1%
- Over age 65 18.2%
- Female 51.0%
- White 62.1%
- Black 19.1%
- Hispanic 11.1%
- Asian 6.9%

1	The Giant Co.	9	\$472.30	42.82%
2	Walmart (SuperCenter)	2	\$89.20	8.09%
3	Weis Markets	4	\$72.65	6.59%
4	CVS	13	\$64.90	5.88%
5	Karns Prime & Fancy Foods	3	\$60.00	5.44%
6	Costco	1	\$58.80	5.33%
7	Sheetz	12	\$56.80	5.15%
8	Sam's Club	1	\$39.20	3.55%
9	Rite Aid	11	\$38.30	3.47%
10	Target	2	\$31.10	2.82%
11	7-Eleven	10	\$24.60	2.23%
12	Aldi	2	\$20.50	1.86%
13	Turkey Hill	16	\$19.80	1.80%
14	ShopRite (Price Rite)	1	\$16.70	1.51%
15	Sharp Shopper	1	\$12.10	1.10%
16	Boyer's Markets	1	\$10.56	0.96%
17	Save A Lot	1	\$6.20	0.56%
18	Rutter's Farm Stores	2	\$4.60	0.42%
19	C&S Independents	4	\$1.65	0.15%
20	ASG	1	\$0.90	0.08%
		97	\$1,100.86	99.81%



FRANKLIN COUNTY (\$468.8 million)
(Includes Chambersburg, Greencastle, Waynesboro)

- Population 157,854
- # of Households 62,576
- Median Income \$71,808
- Under age 18 21.5%
- Over age 65 20.5%
- Female 50.6%
- White 86.3%
- Black 4.4%
- Hispanic 7.0%
- Asian 1.1%

1	The Giant Co. (Martin's)	4	\$164.30	35.05%
2	Walmart (SuperCenter)	2	\$91.70	19.56%
3	Weis Markets	2	\$39.49	8.42%
4	Sheetz	8	\$33.50	7.15%
5	BJ's Wholesale Club	1	\$31.50	6.72%
6	CVS	5	\$23.00	4.91%

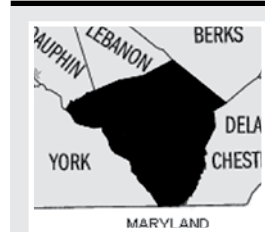
See PENNSYLVANIA COUNTY SHARE on page 89

PENNSYLVANIA COUNTY SHARE OF MARKET: 2024

Continued from page 88

7	Target	1	\$18.30	3.90%
8	Rutter's Farm Stores	7	\$16.40	3.50%
9	Food Lion	1	\$11.50	2.45%
10	Aldi	1	\$8.30	1.77%
11	Rite Aid	2	\$8.20	1.75%
12	Save A Lot	2	\$7.70	1.64%
13	Grocery Outlet	1	\$7.00	1.49%
14	Turkey Hill	1	\$2.60	0.55%
15	C&S Independents	5	\$2.23	0.48%
		43	\$465.72	99.34%

3	Walmart (SuperCenter)	3	\$152.60	8.43%
4	CVS	24	\$120.60	6.67%
5	Turkey Hill	58	\$95.40	5.27%
6	Sheetz	17	\$69.80	3.86%
7	Wegmans	1	\$69.40	3.84%
8	Family Owned Markets	3	\$67.80	3.75%
9	Target	3	\$62.10	3.43%
10	Whole Foods	1	\$39.30	2.17%
11	Costco	1	\$35.90	1.98%
12	Aldi	4	\$35.70	1.97%
13	Wawa	4	\$30.84	1.70%
14	C&S Independents	22	\$28.06	1.55%
15	BJ's Wholesale Club	1	\$27.10	1.50%
16	Sharp Shopper	2	\$25.20	1.39%
17	Grocery Outlet	4	\$24.10	1.33%
18	Rite Aid	6	\$17.90	0.99%
19	Redner's Markets	1	\$15.30	0.85%
20	Rutter's Farm Stores	5	\$12.10	0.67%
21	7-Eleven	4	\$8.50	0.47%
22	Lidl	1	\$7.20	0.40%



LANCASTER COUNTY (\$1.8 billion)
(Includes Lancaster, Ephrata)

- Population 558,589
- # of Households 208,988
- Median Income \$81,458
- Under age 18 22.9%
- Over age 65 19.7%
- Female 50.7%
- White 80.2%
- Black 5.6%
- Hispanic 11.6%
- Asian 2.8%

1	The Giant Co.	14	\$520.70	28.78%
2	Weis Markets	13	\$323.48	17.88%

See PENNSYLVANIA COUNTY SHARE on page 90

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



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




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PENNSYLVANIA COUNTY SHARE OF MARKET: 2024

Continued from page 89


23	Walgreens	1	\$5.70	0.32%
24	IGA	1	\$4.92	0.27%
25	Save A Lot	1	\$4.70	0.26%
26	Royal Farm Stores	1	\$2.60	0.14%
		196	\$1,807.00	99.88%



LEBANON COUNTY (\$461.3 million)
(Includes Lebanon)

- Population 144,252
- # of Households 55,236
- Median Income \$72,532
- Under age 18 22.4%
- Over age 65 20.5%
- Female 50.7%
- White 79.3%
- Black 4.1%
- Hispanic 15.3%
- Asian 2.0%

1	The Giant Co.	3	\$97.60	21.16%
2	Walmart (SuperCenter)	2	\$96.40	20.90%
3	Weis Markets	3	\$69.16	14.99%
4	Redner's Markets	2	\$37.40	8.11%
5	CVS	5	\$23.60	5.12%
6	Turkey Hill	11	\$19.40	4.21%
7	Target	1	\$18.80	4.08%
8	C&S Independents	6	\$17.61	3.82%
9	ShopRite (Price Rite)	1	\$14.40	3.12%
10	Rite Aid	4	\$13.60	2.95%
11	Grocery Outlet	2	\$11.00	2.38%
12	Sheetz	2	\$9.40	2.04%
13	Aldi	1	\$7.90	1.71%
14	America's Food Basket	1	\$7.70	1.67%
15	Save A Lot	1	\$6.30	1.37%
16	Rutter's Farm Stores	2	\$5.00	1.08%
17	7-Eleven	1	\$2.70	0.59%
		48	\$457.97	99.28%




PERRY COUNTY (\$122.9 million)
(Includes New Bloomfield)

- Population 46,083
- # of Households 18,066
- Median Income \$76,103
- Under age 18 20.7%
- Over age 65 20.7%
- Female 49.2%
- White 94.4%
- Black 1.3%
- Hispanic 2.5%
- Asian 0.5%

1	The Giant Co.	1	\$32.30	26.28%
2	Karns Prime & Fancy Foods	2	\$32.00	26.04%
3	Weis Markets	1	\$20.36	16.57%
4	Rite Aid	3	\$14.00	11.39%
5	Sheetz	2	\$11.90	9.68%
6	C&S Independents	6	\$7.84	6.38%

7	Rutter's Farm Stores	1	\$3.00	2.44%
		16	\$121.40	98.78%



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

- Population 464,640
- # of Households 178,543
- Median Income \$79,183
- Under age 18 21.6%
- Over age 65 19.0%
- Female 50.2%
- White 80.7%
- Black 7.8%
- Hispanic 9.2%
- Asian 1.7%

1	The Giant Co.	10	\$573.40	33.23%
2	Walmart (SuperCenter)	6	\$241.70	14.01%
3	Weis Markets	8	\$226.22	13.11%
4	Sam's Club	2	\$107.10	6.21%
5	Rutter's Farm Stores	43	\$86.10	4.99%
6	Target	3	\$62.40	3.62%
7	CVS	12	\$60.90	3.53%
8	Sheetz	13	\$48.20	2.79%
9	Rite Aid	15	\$44.80	2.60%
10	Family Owned Markets	3	\$38.33	2.22%
11	Aldi	3	\$27.80	1.61%
12	Turkey Hill	17	\$26.50	1.54%
13	Royal Farm Stores	8	\$23.50	1.36%
14	BJ's Wholesale Club	1	\$22.50	1.30%
15	Grocery Outlet	3	\$22.20	1.29%
16	Karns Prime & Fancy Foods	1	\$19.00	1.10%
17	Walgreens	3	\$17.60	1.02%
18	ShopRite (Price Rite)	1	\$14.70	0.85%
19	7-Eleven	4	\$13.80	0.80%
20	Great Valu	1	\$13.60	0.79%
21	IGA	1	\$11.70	0.68%
22	C&S Independents	4	\$10.94	0.63%
23	Food Lion	1	\$5.20	0.30%
24	Save A Lot	1	\$4.10	0.24%
25	ASG	1	\$1.30	0.08%
		165	\$1,723.59	99.90%

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

Source: Food World, June 2024

IN REVIEW: THE GIANT COMPANY

State	County	2024 Stores	2024 Sales (in millions)	2024 County Food Sales	% of 2024 County Market	2023 Stores	2023 Sales (in millions)	% of 2023 County Market
MD	Carroll (Martin's)	1	\$76.30	\$747.90	10.20%	1	\$76.20	10.58%
MD	Cecil (Martin's)	1	\$61.80	\$322.80	19.14%	1	\$61.40	19.36%
MD	Washington (Martin's)	4	\$182.60	\$579.60	31.50%	4	\$180.30	31.35%

MD Recap: 6 stores with sales of \$320.7 million. Total retail food sales for MD in the study: \$23.18 billion. The Giant Company share of MD is 1.38%.

PA	Adams	1	\$66.00	\$233.20	28.30%	1	\$65.70	29.92%
PA	Cumberland	10	\$494.90	\$1,249.60	39.60%	10	\$493.60	39.40%
PA	Dauphin	9	\$472.30	\$1,103.00	42.82%	9	\$471.50	42.71%
PA	Franklin (Martin's)	4	\$164.30	\$468.80	35.05%	4	\$163.80	34.11%
PA	Lancaster	14	\$520.70	\$1,809.20	28.78%	14	\$518.90	27.46%
PA	Lebanon	3	\$97.60	\$461.30	21.16%	3	\$97.10	19.91%
PA	Perry	1	\$32.30	\$122.90	26.28%	1	\$32.20	22.39%
PA	York	10	\$573.40	\$1,725.40	33.23%	10	\$570.60	32.95%

PA Recap: 52 stores with sales of \$2.42 billion. Total retail food sales for PA in the study: \$7.17 billion. The Giant Company share of PA is 33.76%.

VA	Culpeper (Martin's)	1	\$48.40	\$187.40	25.83%	1	\$48.20	26.25%
VA	Frederick (Martin's)	3	\$168.60	\$561.90	30.01%	3	\$167.90	30.83%
VA	Warren (Martin's)	1	\$65.40	\$173.50	37.69%	1	\$65.10	38.20%

VA Recap: 5 stores with sales of \$282.4 million. Total retail food sales for VA in the study: \$26.65 billion. The Giant Company share of VA is 1.06%.

Mid-Atlantic Recap: 63 stores with sales of \$3.04 billion annually. Mid-Atlantic retail food sales total: \$61.3 billion.

The Giant Company Per Store Average: \$48.01 million

() Indicates another banner used by the company.

Source: *Food World*, June 2024

Andrea Karns Named Karns' CEO; Scott Karns To Become Chairman

Karns Foods, the Mechanicsburg, PA-based independent retailer, has named Andrea Karns as its new chief executive officer, one of three moves that the perishables-oriented retailer said, "signifies a commitment to continuity, tradition and innovation, ensuring that Karns family ownership continues."

Andrea Karns will replace her father, Scott, who becomes chairman of the board of directors for the 10-store merchant which was founded in 1959 by Scott's father David.

Andrea Karns has been involved with the family supermarket business virtually all of her life. Most recently, she

served as VP-sales and marketing for the company.

Also named to the executive team is Mathew Rudderow, who becomes president of the Central PA merchant which operates stores in Cumberland, Dauphin, Perry and York Counties. Rudderow, who is Andrea Karns' cousin, has been with the family business for nearly 26 years. His duties will focus on innovation, technology and sustaining growth.

Megan Karns, the younger sister of Andrea Karns, is the company's new chief human resources officer. She will leverage her expertise to foster a culture of inclusion, development and



Andrea Karns

excellence.

"We are thrilled to welcome Andrea, Mat, and Megan to their new roles within the Karns



Mathew Rudderow

Foods' leadership team," said Scott Karns. "Their unwavering dedication to Karns' legacy, combined with their diverse



Scott Karns

skills and fresh perspectives, will undoubtedly push our company to new heights of success."


IN REVIEW: WEIS MARKETS

State	County	2024 Stores	2024 Sales (in millions)	2024 County Food Sales	% of 2024 County Market	2023 Stores	2023 Sales (in millions)	% of 2023 County Market
DE	Sussex	3	\$60.31	\$1,078.20	5.59%	3	\$60.36	5.60%
DE Recap: 3 stores with sales of \$60.31 million. Total retail food sales for DE in the study: \$1.64 billion. Weis Markets share of DE is 3.68%.								
MD	Anne Arundel	3	\$51.78	\$2,471.20	2.10%	3	\$48.96	1.97%
MD	Baltimore County	12	\$282.26	\$3,673.10	7.68%	12	\$276.91	7.63%
MD	Calvert	3	\$47.99	\$434.50	11.04%	3	\$46.19	10.91%
MD	Carroll	5	\$100.79	\$747.90	13.48%	5	\$97.32	13.51%
MD	Charles	1	\$11.42	\$624.80	1.83%	1	\$12.56	2.22%
MD	Frederick	6	\$151.20	\$1,040.10	14.54%	6	\$144.90	14.27%
MD	Harford	2	\$51.54	\$1,127.10	4.57%	2	\$49.69	4.46%
MD	Howard	3	\$64.14	\$1,285.80	4.99%	3	\$61.75	4.86%
MD	Montgomery	2	\$29.22	\$4,010.20	0.73%	2	\$27.07	0.68%
MD	Prince George's	3	\$40.13	\$3,586.60	1.12%	3	\$38.27	1.12%
MD	St. Mary's	2	\$37.72	\$406.20	9.29%	2	\$39.03	10.40%
MD	Talbot	1	\$10.51	\$245.70	4.28%	1	\$11.49	4.71%
MD	Washington	3	\$72.17	\$579.60	12.45%	3	\$70.42	12.24%
MD Recap: 46 stores with sales of \$950.87 million. Total retail food sales for MD in the study: \$23.18 billion. Weis Markets share of MD is 4.1%.								
PA	Adams	2	\$42.93	\$233.20	18.41%	2	\$40.83	18.59%
PA	Cumberland	5	\$111.25	\$1,249.60	8.90%	5	\$106.46	8.50%
PA	Dauphin	4	\$72.65	\$1,103.00	6.59%	4	\$71.33	6.46%
PA	Franklin	2	\$39.49	\$468.80	8.42%	2	\$38.24	7.96%
PA	Lancaster	13	\$323.48	\$1,809.20	17.88%	13	\$315.94	16.72%
PA	Lebanon	3	\$69.16	\$461.30	14.99%	3	\$68.34	14.02%
PA	Perry	1	\$20.36	\$122.90	16.57%	1	\$20.75	14.43%
PA	York	8	\$226.22	\$1,725.40	13.11%	8	\$224.99	12.99%
PA	PA	38	\$905.54	\$7,173.40	12.62%	38	\$886.88	12.13%
PA Recap: 38 stores with sales of \$905.54 million. Total retail food sales for PA in the study: \$7.17 billion. Weis Markets share of PA is 12.62%.								
VA	Culpeper	1	\$14.23	\$187.40	7.59%	1	\$13.93	7.59%
VA	Spotsylvania	5	\$59.99	\$887.30	6.76%	5	\$59.78	6.98%
VA	Stafford	3	\$36.53	\$456.30	8.01%	3	\$36.76	8.32%
VA Recap: 9 stores with sales of \$110.75 million. Total retail food sales for VA in the study: \$26.65 billion. Weis Markets share of VA is 0.42%.								

Mid-Atlantic Recap: 96 stores with sales of \$2.03 billion annually. Mid-Atlantic retail food sales total: \$61.3 billion.

Weis Markets Per Store Average: \$21.12 million

Source: Food World, June 2024



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Richmond Supermarket Leaders

- Kroger Still Dominant At 32.5%
- Food Lion A Close Second
- Publix Share Steady At 12.4%
- Lidl Shuttters 1 Unit
- Competition, Economy Slow Growth

		2024	2024 Sales	% of 2024	2023	2023 Sales	% of 2023
Rank	Company	Stores	(in millions)	Market	Stores	(in millions)	Market
1	Kroger (Marketplace)	18	\$691.50	32.49%	18	\$679.90	32.28%
2	Food Lion	50	\$663.60	31.18%	50	\$658.10	31.24%
3	Publix	16	\$263.30	12.37%	16	\$261.00	12.39%
4	Wegmans	2	\$136.00	6.39%	2	\$135.50	6.43%
5	Aldi	13	\$101.40	4.76%	13	\$97.40	4.62%
6	International Markets	6	\$59.40	2.79%	6	\$58.90	2.80%
7	Whole Foods	2	\$47.60	2.24%	2	\$47.10	2.24%
8	Trader Joe's	2	\$42.70	2.01%	2	\$42.10	2.00%
9	The Fresh Market	4	\$41.90	1.97%	4	\$41.50	1.97%
10	Lidl	5	\$39.50	1.86%	6	\$42.70	2.03%
		118	\$2,086.90	98.04%	119	\$2,064.20	98.00%

This chart lists the top 10 supermarket retailers in the Richmond market. Counties/cities included are: Charles City, Chesterfield, Dinwiddie, Goochland, Hanover, Henrico, New Kent and Powhatan. Petroleum sales are not included. () Name in parentheses indicates another banner used by the company.

Total supermarket sales for the area are \$2.13 billion.

Source: Food World, June 2024

Richmond Market Leaders

- Alts. Share Dips To 52.5%
- Strong Comps Help WM Gain
- Drug Closings Cut Share To 10.8%
- Sheetz Opens 4 C-Stores
- Combined Club Share Is 7.3%

		2024	2024 Sales	% of 2024	2023	2023 Sales	% of 2023
Rank	Company	Stores	(in millions)	Market	Stores	(in millions)	Market
1	Walmart (SC/Neighborhood Mkt)	17	\$778.10	16.85%	18	\$749.90	16.42%
2	Kroger (Marketplace)	18	\$691.50	14.97%	18	\$679.90	14.88%
3	Food Lion	50	\$663.60	14.37%	50	\$658.10	14.36%
4	Wawa	31	\$294.48	6.38%	31	\$295.60	6.47%
5	CVS	57	\$292.50	6.33%	58	\$293.00	6.41%
6	Publix	16	\$263.30	5.70%	16	\$261.00	5.71%
7	7-Eleven	98	\$258.50	5.60%	100	\$268.30	5.87%
8	Walgreens	32	\$204.00	4.42%	33	\$207.60	4.54%
9	Target	12	\$193.70	4.19%	12	\$195.30	4.28%
10	Wegmans	2	\$136.00	2.95%	2	\$135.50	2.97%
11	BJ's Wholesale Club	3	\$132.60	2.87%	3	\$131.60	2.88%
12	Sam's Club	3	\$101.90	2.21%	3	\$100.80	2.21%
13	Costco	2	\$101.80	2.20%	2	\$100.60	2.20%
14	Aldi	13	\$101.40	2.20%	13	\$97.40	2.13%
15	Sheetz	18	\$66.90	1.45%	14	\$51.10	1.12%
16	International Markets	6	\$59.40	1.29%	6	\$58.90	1.29%
17	Whole Foods	2	\$47.60	1.03%	2	\$47.10	1.03%
18	Trader Joe's	2	\$42.70	0.92%	2	\$42.10	0.92%
19	Fresh Market	4	\$41.90	0.91%	4	\$41.50	0.91%
20	Lidl	5	\$39.50	0.86%	6	\$42.70	0.93%
		391	\$4,511.38	97.69%	393	\$4,458.00	97.60%

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 81. 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 \$4.62 billion. Source: Food World, June 2024

IN REVIEW: KROGER

State	County	2024 Stores	2024 Sales (in millions)	2024 County Food Sales	% of 2024 County Market	2023 Stores	2023 Sales (in millions)	% of 2023 County Market
VA	Albemarle	3	\$148.90	\$716.10	20.79%	3	\$148.20	21.20%
VA	Chesapeake City (Marketplace)	3	\$132.10	\$983.60	13.43%	3	\$131.70	13.90%
VA	Chesterfield	7	\$277.40	\$1,710.90	16.21%	7	\$274.50	16.26%
VA	Gloucester	1	\$22.60	\$139.70	16.18%	1	\$22.50	16.51%
VA	Hampton/Newport News	1	\$33.40	\$1,314.50	2.54%	1	\$33.20	2.49%
VA	Hanover (Marketplace)	2	\$106.90	\$531.40	20.12%	2	\$104.20	20.21%
VA	Henrico (Marketplace)	9	\$307.20	\$2,028.10	15.15%	9	\$301.20	14.88%
VA	Isle Of Wight	1	\$29.60	\$101.80	29.08%	1	\$29.10	27.82%
VA	Portsmouth City (Marketplace)	1	\$43.90	\$298.60	14.70%	1	\$43.50	14.58%
VA	Suffolk City (Marketplace)	2	\$77.90	\$345.00	22.58%	2	\$77.10	23.21%
VA	Virginia Beach (Marketplace)	5	\$163.20	\$1,831.90	8.91%	5	\$159.80	8.87%
VA	York	2	\$44.90	\$203.90	22.02%	2	\$44.70	22.04%

VA Recap: 37 stores with sales of \$1.39 billion. Total retail food sales for VA in the study: \$26.65 billion. Kroger share of VA is 5.21%.

Mid-Atlantic Recap: 37 stores with sales of \$1.39 billion annually. Mid-Atlantic retail food sales total: \$61.3 billion. Kroger Per Store Average: \$37.51 million

() Indicates another banner used by the company.

Source: Food World, June 2024



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Richmond-Norfolk Supermarket Leaders

- Food Lion Commands R-N Area
- Kroger: 37 Stores, 24.1% Share
- Wegmans Still Per-Avg. Leader
- Aldi Gains Share On Solid Comps
- TJ's Unaffected By Tight Economy

		2024	2024 Sales	% of 2024	2023	2023 Sales	% of 2023
Rank	Company	Stores	(in millions)	Market	Stores	(in millions)	Market
1	Food Lion	155	\$2,145.60	37.29%	155	\$2,119.30	37.21%
2	Kroger (Marketplace)	37	\$1,388.00	24.12%	37	\$1,369.70	24.05%
3	Harris Teeter	25	\$656.90	11.42%	25	\$655.10	11.50%
4	Publix	18	\$293.30	5.09%	17	\$274.90	4.83%
5	Wegmans	4	\$284.90	4.95%	4	\$283.60	4.98%
6	Aldi	33	\$277.60	4.82%	33	\$268.90	4.72%
7	Whole Foods	5	\$154.90	2.69%	5	\$153.80	2.70%
8	Trader Joe's	6	\$122.60	2.13%	6	\$120.80	2.12%
9	Lidl	15	\$122.30	2.13%	16	\$124.10	2.18%
10	The Fresh Market	9	\$114.60	1.99%	9	\$113.20	1.99%
		307	\$5,662.20	98.41%	307	\$5,483.40	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 \$5.75 billion.

Source: Food World, June 2024

Richmond-Norfolk Market Leaders

- Alternates Share Now 49.5%
- FL, WM, Kroger Control 45.2%
- 7-Eleven Still Dominant C-Store
- Mass Merchants Capture 20.3%
- On Closures, Drug Chains Slide

		2024	2024 Sales	% of 2024	2023	2023 Sales	% of 2023
Rank	Company	Stores	(in millions)	Market	Stores	(in millions)	Market
1	Walmart (SC/Neighborhood Mkt)	53	\$2,166.10	17.19%	54	\$2,069.10	16.58%
2	Food Lion	155	\$2,145.60	17.03%	155	\$2,119.30	16.99%
3	Kroger (Marketplace)	37	\$1,388.00	11.02%	37	\$1,369.70	10.98%
4	7-Eleven	408	\$1,010.70	8.02%	403	\$973.00	7.80%
5	Harris Teeter	25	\$656.90	5.21%	25	\$655.10	5.25%
6	CVS	119	\$627.60	4.98%	120	\$620.80	4.98%
7	Wawa	68	\$588.40	4.67%	69	\$573.85	4.60%
8	Walgreens	84	\$509.70	4.05%	85	\$498.10	3.99%
9	Target	26	\$395.40	3.14%	26	\$398.50	3.19%
10	Sam's Club	8	\$297.90	2.36%	8	\$294.60	2.36%
11	Wegmans	4	\$284.90	2.26%	4	\$283.60	2.27%
12	Publix	18	\$293.30	2.33%	17	\$274.90	2.20%
13	BJ's Wholesale Club	7	\$280.10	2.22%	7	\$278.00	2.23%
14	Aldi	33	\$277.60	2.20%	33	\$268.90	2.16%
15	Costco	5	\$240.40	1.91%	5	\$237.80	1.91%
16	Military Commissaries	6	\$180.80	1.44%	6	\$179.19	1.44%
17	Whole Foods	5	\$154.90	1.23%	5	\$153.80	1.23%
18	Trader Joe's	6	\$122.60	0.97%	6	\$120.80	0.97%
19	Lidl	15	\$122.30	0.97%	16	\$124.10	0.99%
20	Rite Aid	33	\$120.80	0.96%	60	\$219.00	1.76%
		1,115	\$11,864.50	94.07%	1,141	\$11,712.14	93.87%

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 81. Petroleum sales not included. Counties/cities included are: Albemarle, Caroline, Charles City, Chesapeake City, Chesterfield, Cumberland, Dinwiddie, Essex, Gloucester, Goochland, Greene, Hampton/N News City, Hanover, Henrico, Isle of Wight, James City, King&Queen, Lancaster, Louisa, Mathews, Middlesex, New Kent, Norfolk City, Northumberland, Nottoway, Orange, Portsmouth City, Powhatan, Pr. George, Richmond, Southampton, Suffolk City, Surry, Sussex, Virginia Beach City, York. () Alternate banner. Total food sales for the area are \$12.6 billion.

Source: Food World, June 2024

GREAT BALLS OF FIRE

By Duke Winston

Retailers Feel Strong Headwinds; Walmart, Food Lion Remain Atop Richmond, Tidewater Markets

The record or near-record sales that most food and drug retailers experienced since early 2020 had to come to an end at some time. And that inflection point began in early 2023 and still continues today. Retailers that routinely posted comp store increases of 6-8 percent in the COVID and inflation years of 2020, 2021 and 2022, saw their identical store revenue dip anywhere from plus 2 percent to minus 3 percent in most cases.

In the fiercely competitive and overstored Richmond and Tidewater markets, exceptions were few as most merchants attempted to just survive in the toughest economic period since 2008, one made even more challenging after experiencing some of the best numbers in their history.

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

Walmart – It's through tough times that Walmart shines even more brightly. In 2020, CEO Doug McMillon predicted that the Behemoth's price image would sustain them well during times of economic challenges. Walmart's gains in the 2020-2023 period were strong, but so were most other competitors'. The belt-tightening of the last 18 months has shown the company's mettle. And locally, nobody produced better same store sales gains in both Richmond and Tidewater. Certainly, its growing digital presence has helped the overall company and with an aggressive remodeling and new store program now in place, the world's largest retailer is poised to extend its lead further in Richmond and press Food Lion for the dominant position in Tidewater, too.

Kroger – Kind of blah year for the nation's largest pure-play supermarket operator. For the second consecutive year, Kroger had no new store activity in either market, although its new 113,500 square foot replacement store in Mechanicsville (which will carry the Marketplace banner) is expected to open later this year. With much of the company's focus on the continuing Albertsons merger saga, Kroger's operational execution at its Richmond and Tidewater stores doesn't seem to be as crisp as in previous years. However, as long as it continues to exist, the Cincinnati-based merchant will always be a formidable factor.

Food Lion – The southernmost brand of the Ahold Delhaize USA (ADUSA) network continues to produce the best sales results in the entire company (46 consecutive quarters of positive comps). Because of challenging market

See **GREAT BALLS** on page 99

PER STORE AVERAGES: 2024

Rank	Company	Stores	2024 Sales (in millions)	Per Store Avg. (in millions)
1	Wegmans	26	\$2,374.10	\$91.31
2	Costco*	30	\$2,074.60	\$69.15
3	The Giant Co. (Martin's)	63	\$3,024.60	\$48.01
4	Sam's Club*	26	\$1,132.80	\$43.57
5	Walmart (SC/Neighborhood Mkt)*	158	\$6,332.60	\$40.08
6	Giant Food	160	\$6,365.90	\$39.79
7	BJ's Wholesale Club*	30	\$1,187.80	\$39.59
8	Kroger (Marketplace)	37	\$1,388.00	\$37.51
9	Whole Foods (Amazon Fresh)	43	\$1,521.10	\$35.37
10	Harris Teeter	78	\$2,521.40	\$32.33

() 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 81.

Source: Food World, June 2024

WASHINGTON, DC SHARE OF MARKET: 2024



DISTRICT OF COLUMBIA (\$2.66 billion)

• Population	671,803	• Female	52.2%
• # of Households	315,785	• White	36.3%
• Median Income	\$101,722	• Black	44.3%
• Under age 18	18.5%	• Hispanic	11.5%
• Over age 65	12.6%	• Asian	4.0%

Rank	Company	Stores	Sales (in millions)	% of Market
1	CVS	50	\$462.30	17.36%
2	Albertsons (Safeway)	12	\$399.70	15.01%
3	Whole Foods (Amazon Fresh)	9	\$363.40	13.65%
4	Giant Food	7	\$295.50	11.10%
5	Harris Teeter	3	\$169.30	6.36%
6	Trader Joe's	5	\$154.20	5.79%
7	International Markets	12	\$146.20	5.49%
8	Target	5	\$104.80	3.94%
9	Wegmans	1	\$91.50	3.44%
10	Walgreens	10	\$77.40	2.91%
11	Costco	1	\$72.20	2.71%
12	7-Eleven	37	\$70.70	2.66%
13	Streets Market	7	\$55.30	2.08%
14	Walmart (SuperCenter)	2	\$52.30	1.96%
15	Wawa	5	\$19.53	0.73%
16	Lidl	2	\$17.50	0.66%
17	Military Commissaries	1	\$16.30	0.61%
18	MOM's Organic Market	1	\$16.20	0.61%
19	Aldi	1	\$13.90	0.52%
		171	\$2,598.23	97.59%

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

Source: Food World, June 2024

Consumer Spending Cutbacks Create Flat Market: Giant Food, Walmart CVS Remain Atop

from page 1

measuring period was a replacement unit of its Westbard Avenue unit in Bethesda, MD. Giant also closed a large digital fulfillment center in Hanover, MD.

While Walmart once again didn't open any new stores (in fact it closed a unit in Washington, DC), the company's strong price image (in a challenged economic environment for food spending) helped the country's largest retailer gain share at a faster rate than any other merchant except Costco and Aldi. Now operating 158 stores in the region, the "Behemoth" posted estimated extrapolated food and drug sales of \$6.33 billion. Walmart also announced that it plans to shortly begin a multi-billion-dollar effort to remodel 650 existing stores and resume building new units (about 150) over the next five years. After spending billions since 2017 to build and upgrade its digital platforms, the Bentonville, AR merchant is poised to become an even greater threat in the brick-

and-mortar space.

The channel that suffered most during the past year was drug. Leader CVS remained the dominant player in the region but closed 19 stores over the past 12 months. The Woonsocket, RI-based multi-faceted health company now operates 612 drug stores in the region with estimated sales of \$3.70 billion, a decline of nearly \$70 million from last year's revenue.

Remaining in fourth place among all Mid-Atlantic merchants was Food Lion which continued to be the best performing brand in the ADUSA portfolio. The Salisbury, NC-based grocery chain now operates 256 stores (same as last year) and saw estimated sales increases from \$3.46 billion to \$3.49 billion in a tough economic climate.

Albertsons Mid-Atlantic, which includes the Safeway, Acme and Balducci's banners in this study, had a steady year with sales of \$3.44 billion. Its primary Safeway banner showed modest comp store sales gains and continued to

operate the same 124 supermarkets (including a major remodeling of one of its best stores in the Georgetown section of DC). Of course, a larger story remains incomplete as the outcome of the \$25 billion Albertsons-Kroger potential merger lingers in litigation until at least this summer.

The Giant Company (TGC), the ADUSA brand based in Carlisle, PA, remained sixth-ranked among all grocery retailers in the Mid-Atlantic region. Sales at its 63 Giant and Martin's stores (same as last year) in Pennsylvania, Maryland and Virginia rose slightly to an estimated \$3.02 billion.

Continuing to open new stores in the region was national convenience store leader 7-Eleven. Operating both corporately-owned and franchised c-stores, the Dallas, TX-based operator, which is owned by Japanese juggernaut Seven & i Holdings, now operates 1,198 stores in the Mid-Atlantic which produced an estimated \$2.96 billion in annual sales.

Eighth-ranked was another conventional supermarket retail-

er that experienced flat sales was Harris Teeter. The Matthews, NC-based Kroger subsidiary rang up estimated sales of \$2.52 billion at its 78 area stores. During the past year, HT replaced its first DC area store (in the Ballston section of Arlington, VA) with a beautiful new store on Glebe Road. Much like Safeway, Harris Teeter awaits a court decision on the legality of the proposed Kroger-Albertsons merger. If successful, one can expect significant store divestitures from both entities because of store overlap.

Holding down ninth place among Mid-Atlantic retailers was Wegmans, which for the first time in five years did not open any new stores in the region (it did debut stores in Yardley, PA and in Manhattan). Sales were slightly better than the market norm with an estimated volume of \$2.37 for its current 26 stores in the region.

Rounding out the area's top 10 was Target. Frankly, the Minneapolis-based mass merchant had a down year. Extrapolated sales declined from an estimated \$2.22

billion last year to \$2.17 over the current 12-month measuring period. The company closed two stores and now operates 112 units in the market.

Other retailers that topped the \$1 billion mark in annual sales in the 89-county region included: the 138 "International Markets" (specialty and ethnic supermarkets that are at least 20,000 square feet in size are grouped together in this survey). Collectively, those stores rang up estimated annual sales of \$2.16 billion; Costco - 30 stores, estimated extrapolated annual sales of \$2.07 billion (one of the best performers in the region); Weis Markets with 96 stores and annual revenue of \$2.03 billion; Walgreens (one of the worst performers in the survey) - 311 stores and \$1.89 billion in estimated annual sales; Whole Foods, with 37 natural and organic stores and now six Amazon Fresh units (two fewer than last year and performing poorly) that together amassed an estimated

See **MARKET STUDY** on page 99



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GREAT BALLS OF FIRE

from page 97

realities, Food Lion's gains were not as robust as in recent years, but the ADUSA brand still managed slight market share gains in both Tidewater (where it is the leading retailer) and Richmond (where it remains in third place). We should no longer be surprised that a company that was struggling to find its identity (after the Ahold Delhaize merger of 2016) has emerged as a solid performer in the ultra-competitive Richmond and Tidewater markets, and is also a star among the many retail brands operating in the Ahold Delhaize global network. President Meg Ham and her team deserve a lot of credit.

Harris Teeter – Much like its sister company, Kroger, the Teeter had a flat year as customers prioritized price over service and selection. With no presence in the Richmond market, the upscale merchant has carved a nice niche at its 22 units in Tidewater over the past 40 years, but with no new stores on the horizon, continued consumer spending shifts and the presence of one new Publix store now open and three more coming, Harris Teeter is somewhat vulnerable to both the intensifying competitive landscape and a customer more focused on price.

Publix – Since Publix opened its first Richmond store in 2017, Big Duke has preached that the Lakeland-FL based powerhouse could offer more to customers that would translate into increased sales. Clearly, it doesn't really matter what I or anyone else thinks about the nation's most profitable grocery chain. They have a formula and it's working even though I contend that Publix could improve volumes at its 16 Richmond area stores if it would improve its mix, especially in fresh. Although its presence in that market is solid with a share of 5.7 percent, expansion opportunities are limited. That's not the case in Tidewater where Publix opened a store in Suffolk late last year and has three more on the docket – Virginia Beach, Chesapeake and Carrollton – in the next few years which will bolster its share in a market where it previously operated one store in Williamsburg. It's easy to underestimate Publix after visiting their stores, but clearly the company has a plan that they're not changing.

Aldi – By comparison, it was a rather quiet year for the German discounter. For the first time in a decade Aldi opened no new stores in the region, but that will change in the next few years when it opens 800 stores nationwide. Despite the lack of new store progress over the past 12 months, Aldi is worth discussing, not only for posting some of the best same store sales increases in a tight year, but also for its excellence of execution. Other than Walmart, Big Duke predicts that Aldi will be the most disruptive retailer in the combined Richmond and Norfolk markets over the next few years.

MARKET STUDY

from page 98

annual revenue of \$1.52 billion; regional convenience store power Wawa (another stellar performer this year), whose 191 c-stores (six more than last year) rang up annual sales of \$1.50 billion; Kroger, which continued to operate 37 conventional stores and Marketplace stores in the Mid-Atlantic and garnered estimated annual sales of \$1.39 billion; Aldi, (one of the biggest gainers) with 149 stores (five more than last year) and estimated annual revenue of \$1.38 billion; BJ's Wholesale Club - 30 stores (one more than last year) with estimated extrapolated annual sales of \$1.19 billion; and Sam's Club (a unit of Walmart), which operated 26 club units in the Mid-Atlantic region, which amassed an extrapolated annual volume estimate of \$1.13 billion.

By class of trade, the leaders are: supermarkets - Giant Food (Landover) with 160 stores, \$6.37 billion in sales; clubs - Costco with 30 stores, \$2.07 billion in extrapolated sales; mass - Walmart with 159 stores, \$6.33 billion in extrapolated sales; drug - CVS with 612 stores and \$3.70 billion in estimated sales; and convenience stores - 7-Eleven with 1,198 stores and an estimated \$2.96 billion in revenue.

Additionally, the 20 military commissaries in the region rang up annual sales of \$540.5 million, a slight increase over last year.

Viewed as a group, the 48 corporate chains in the market operated 5,181 stores and accrued an estimated \$60.2 billion in annual sales, good for 98.2 percent of the Mid-Atlantic region's \$60.6 billion food and drug market.

Among all independent retailers (those operating between two and 17 stores), Mechanicsburg, PA-based Karns Prime & Fancy Foods led all merchants with annual sales of \$186 million at its 10 Central PA stores. Baltimore-based B. Green, which operates stores under the Green Valley and Food Depot banners, ranked second among all indies with six stores and \$143.9 million in annual volume. Also surpassing the \$100 million sales mark was Family Owned Markets, the Millersville, PA retail marketing group that supervises seven independent stores in Central PA and northern MD that had annual sales of \$127.7 million.

As a combined group, the 10 multi-store independent retail organizations in the Mid-Atlantic operated 52 supermarkets which garnered estimated annual sales of \$786.5 million. Collectively, those stores controlled 1.28 percent of the region's food and drug

revenue.

Major news stories over the past year included the rejection of the Kroger-Albertsons merger by the FTC (which included 579 stores that would be acquired by wholesaler C&S).

Not surprisingly, when economic conditions get more challenging and sales and earnings are impacted, changes at the CEO level are inevitable. Here are a few c-suite changes we've seen over the past year that were caused by bottom line pressures or planned retirements. At Costco, Ron Vachris replaced Craig Jelinek as CEO who retired. Tim Wentworth became Walgreens' newest chief executive after Rosalind Brewer resigned under pressure. Joel Rampoldt, a management consultant, become the first American born president of Lidl's U.S. operations, replacing Michal Lagunioneck. Rampoldt is the fifth person to lead the German discounter's U.S. business in slightly more than a decade. Kevin Murphy took the helm at Publix on January 1, replacing Todd Jones, who became executive chairman of the highly profitable Lakeland, FL based grocery chain. Finally, Fred Boehler became chief executive officer of beleaguered discount merchant Save A Lot after Leon Bergmann was forced out.

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Tidewater Supermarket Leaders

- Food Lion Extends Supers Lead
- Harris Teeter Share Flat At 20%
- Kroger Solid With 18.9% Share
- Publix Opens New Suffolk Unit
- Tight Economy Aids Discounters

		2024	2024 Sales	% of 2024	2023	2023 Sales	% of 2023
Rank	Company	Stores	(in millions)	Market	Stores	(in millions)	Market
1	Food Lion	81	\$1,186.60	41.04%	81	\$1,168.90	40.90%
2	Harris Teeter	22	\$579.30	20.04%	22	\$576.80	20.18%
3	Kroger (Marketplace)	16	\$547.60	18.94%	16	\$541.60	18.95%
4	Aldi	19	\$167.10	5.78%	19	\$162.60	5.69%
5	Lidl	9	\$74.00	2.56%	9	\$72.80	2.55%
6	Wegmans	1	\$73.10	2.53%	1	\$72.70	2.54%
7	The Fresh Market	5	\$72.70	2.51%	5	\$71.70	2.51%
8	Whole Foods	2	\$69.60	2.41%	2	\$69.30	2.42%
9	Trader Joe's	3	\$56.70	1.96%	3	\$55.90	1.96%
10	International Markets	3	\$43.30	1.50%	3	\$42.80	1.50%
		161	\$2,870.00	99.27%	161	\$2,835.10	99.21%

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 \$2.89 billion.

Source: Food World, June 2024

Tidewater Market Leaders

- Alts. Still Control More Than 50%
- Food Lion Remains Dominant
- Solid IDs Boost Walmart
- Drug Chains Decline Continues
- 7-Eleven Growing, Share Is 10.5%

		2024	2024 Sales	% of 2024	2023	2023 Sales	% of 2023
Rank	Company	Stores	(in millions)	Market	Stores	(in millions)	Market
1	Food Lion	81	\$1,186.60	18.21%	81	\$1,168.90	18.12%
2	Walmart (SC/Neighborhood Mkt)	29	\$1,094.20	16.80%	29	\$1,040.90	16.14%
3	7-Eleven	283	\$682.30	10.47%	277	\$640.80	9.94%
4	Harris Teeter	22	\$579.30	8.89%	22	\$576.80	8.94%
5	Kroger (Marketplace)	16	\$547.60	8.41%	16	\$541.60	8.40%
6	Wawa	37	\$293.92	4.51%	38	\$278.25	4.31%
7	CVS	47	\$266.50	4.09%	47	\$258.30	4.01%
8	Walgreens	42	\$251.80	3.87%	42	\$236.60	3.67%
9	Target	12	\$169.00	2.59%	12	\$170.10	2.64%
10	Sam's Club	4	\$167.40	2.57%	4	\$165.60	2.57%
11	Aldi	19	\$167.10	2.57%	19	\$162.60	2.52%
12	Military Commissaries	5	\$152.50	2.34%	5	\$151.02	2.34%
13	BJ's Wholesale Club	4	\$147.50	2.26%	4	\$146.40	2.27%
14	Costco	2	\$94.90	1.46%	2	\$93.90	1.46%
15	Rite Aid	26	\$94.50	1.45%	50	\$182.30	2.83%
16	Lidl	9	\$74.00	1.14%	9	\$72.80	1.13%
17	Wegmans	1	\$73.10	1.12%	1	\$72.70	1.13%
18	Fresh Market	5	\$72.70	1.12%	5	\$71.70	1.11%
19	Whole Foods	2	\$69.60	1.07%	2	\$69.30	1.07%
20	Trader Joe's	3	\$56.70	0.87%	3	\$55.90	0.87%
		649	\$6,241.22	95.80%	668	\$6,156.47	95.46%

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 81. Petroleum sales not included. Counties/cities included: Chesapeake City, Gloucester, Hampton/Newport News City, Isle of Wight, James City, Norfolk, Portsmouth City, Suffolk City, Virginia Beach City and York. () Alt. banner. Total food sales for the area are \$6.51 billion. Source: Food World, June 2024

IN REVIEW: ALDI

State	County	2024 Stores	2024 Sales (in millions)	2024 County Food Sales	% of 2024 County Market	2023 Stores	2023 Sales (in millions)	% of 2023 County Market
DC	Washington	1	\$13.90	\$2,662.40	0.52%	1	\$13.60	0.52%
DC Recap: 1 store with sales of \$13.9 million. Total retail food sales for DC in the study: \$2.66 billion. Aldi share of DC is 0.52%.								
DE	Kent	3	\$25.50	\$561.70	4.54%	3	\$25.10	4.48%
DE	Sussex	3	\$30.80	\$1,078.20	2.86%	1	\$11.30	1.05%
DE Recap: 6 stores with sales of \$56.3 million. Total retail food sales for DE in the study: \$1.64 billion. Aldi share of DE is 3.43%.								
MD	Anne Arundel	7	\$67.30	\$2,471.20	2.72%	7	\$68.00	2.73%
MD	Baltimore City	4	\$28.20	\$1,566.00	1.80%	4	\$26.90	1.70%
MD	Baltimore County	11	\$73.10	\$3,673.10	1.99%	11	\$76.20	2.10%
MD	Caroline	1	\$10.60	\$104.40	10.15%	1	\$10.30	10.23%
MD	Carroll	2	\$16.90	\$747.90	2.26%	2	\$17.90	2.49%
MD	Cecil	1	\$9.70	\$322.80	3.00%	1	\$9.10	2.87%
MD	Charles	2	\$10.50	\$624.80	1.68%	2	\$10.30	1.82%
MD	Dorchester	1	\$9.60	\$71.60	13.41%	0	\$0.00	0.00%
MD	Frederick	2	\$22.40	\$1,040.10	2.15%	2	\$21.80	2.15%
MD	Harford	4	\$21.90	\$1,127.10	1.94%	4	\$21.20	1.90%
MD	Howard	1	\$13.10	\$1,285.80	1.02%	1	\$12.80	1.01%
MD	Montgomery	8	\$75.50	\$4,010.20	1.88%	8	\$74.30	1.87%
MD	Prince George's	13	\$122.40	\$3,586.60	3.41%	13	\$116.20	3.39%
MD	St. Mary's	1	\$8.80	\$406.20	2.17%	1	\$8.50	2.27%
MD	Talbot	1	\$9.20	\$245.70	3.74%	1	\$8.90	3.65%
MD	Washington	2	\$15.10	\$579.60	2.61%	2	\$14.80	2.57%
MD	Wicomico	1	\$11.90	\$317.40	3.75%	1	\$11.70	3.67%
MD	Worcester	1	\$10.70	\$254.70	4.20%	0	\$0.00	0.00%
MD Recap: 63 stores with sales of \$536.9 million. Total retail food sales for MD in the study: \$23.18 billion. Aldi share of MD is 2.32%.								
PA	Cumberland	4	\$38.70	\$1,249.60	3.10%	4	\$38.10	3.04%
PA	Dauphin	2	\$20.50	\$1,103.00	1.86%	2	\$19.80	1.79%
PA	Franklin	1	\$8.30	\$468.80	1.77%	1	\$8.10	1.69%
PA	Lancaster	4	\$35.70	\$1,809.20	1.97%	4	\$35.20	1.86%
PA	Lebanon	1	\$7.90	\$461.30	1.71%	1	\$7.70	1.58%
PA	York	3	\$27.80	\$1,725.40	1.61%	3	\$27.20	1.57%
PA Recap: 15 stores with sales of \$138.9 million. Total retail food sales for PA in the study: \$7.17 billion. Aldi share of PA is 1.94%.								
VA	Albemarle	1	\$9.10	\$716.10	1.27%	1	\$8.90	1.27%
VA	Chesapeake City	3	\$19.60	\$983.60	1.99%	3	\$19.10	2.02%
VA	Chesterfield	6	\$44.00	\$1,710.90	2.57%	6	\$43.10	2.55%
VA	Culpeper	1	\$10.20	\$187.40	5.44%	1	\$9.90	5.39%
VA	Fairfax	14	\$146.10	\$6,114.10	2.39%	13	\$129.40	2.16%
VA	Frederick	1	\$9.30	\$561.90	1.66%	1	\$9.10	1.67%
VA	Gloucester	1	\$11.60	\$139.70	8.30%	1	\$11.40	8.36%
VA	Hampton/Newport News	3	\$26.30	\$1,314.50	2.00%	3	\$26.10	1.96%
VA	Hanover	1	\$9.40	\$531.40	1.77%	1	\$9.20	1.78%
VA	Henrico	6	\$48.00	\$2,028.10	2.37%	6	\$45.10	2.23%
VA	James City	1	\$9.10	\$448.80	2.03%	1	\$8.80	1.94%
VA	Loudoun	4	\$43.50	\$1,677.10	2.59%	4	\$42.70	2.62%
VA	Norfolk City	3	\$25.70	\$846.80	3.03%	3	\$25.20	2.99%
VA	Portsmouth City	1	\$9.50	\$298.60	3.18%	1	\$9.20	3.08%
VA	Prince William	6	\$68.20	\$2,169.60	3.14%	6	\$66.80	3.11%
VA	Spotsylvania	3	\$18.60	\$887.30	2.10%	3	\$18.10	2.11%
VA	Stafford	1	\$9.10	\$456.30	1.99%	1	\$8.80	1.99%
VA	Suffolk City	1	\$12.50	\$345.00	3.62%	1	\$12.10	3.64%
VA	Virginia Beach	6	\$52.80	\$1,831.90	2.88%	6	\$50.70	2.81%
VA	Warren	1	\$8.60	\$173.50	4.96%	1	\$8.10	4.75%

VA Recap: 64 stores with sales of \$591.3 million. Total retail food sales for VA in the study: \$26.65 billion. Aldi share of VA is 2.22%.

Mid-Atlantic Recap: 149 stores with sales of \$1.34 billion annually. Mid-Atlantic retail food sales total: \$61.3 billion.

Aldi Per Store Average: \$8.97 million

Source: Food World, June 2024

IN REVIEW: CVS

State	County	2024 Stores	2024 Sales (in millions)	2024 County Food Sales	% of 2024 County Market	2023 Stores	2023 Sales (in millions)	% of 2023 County Market
DC	Washington	50	\$462.30	\$2,662.40	17.36%	55	\$484.80	18.52%
DC Recap: 50 stores with sales of \$ 462.3 million. Total retail food sales for DC in the study: \$2.66 billion. CVS share of DC is 17.36%.								
DE	Kent	3	\$17.40	\$561.70	3.10%	3	\$17.60	3.14%
DE	Sussex	6	\$32.90	\$1,078.20	3.05%	6	\$34.10	3.16%
DE Recap: 9 stores with sales of \$50.3 million. Total retail food sales for DE in the study: \$1.64 billion. CVS share of DE is 3.07%.								
MD	Anne Arundel	22	\$121.70	\$2,471.20	4.92%	22	\$123.80	4.97%
MD	Baltimore City	14	\$90.10	\$1,566.00	5.75%	16	\$95.70	6.05%
MD	Baltimore County	25	\$152.70	\$3,673.10	4.16%	26	\$156.50	4.31%
MD	Calvert	3	\$14.80	\$434.50	3.41%	3	\$14.80	3.50%
MD	Carroll	6	\$32.40	\$747.90	4.33%	6	\$31.60	4.39%
MD	Cecil	1	\$5.20	\$322.80	1.61%	1	\$5.20	1.64%
MD	Charles	7	\$38.10	\$624.80	6.10%	8	\$41.80	7.40%
MD	Frederick	12	\$68.50	\$1,040.10	6.59%	12	\$68.70	6.77%
MD	Harford	8	\$36.70	\$1,127.10	3.26%	8	\$36.80	3.31%
MD	Howard	9	\$46.30	\$1,285.80	3.60%	9	\$45.60	3.59%
MD	Montgomery	43	\$450.60	\$4,010.20	11.24%	43	\$452.50	11.42%
MD	Prince George's	46	\$277.30	\$3,586.60	7.73%	49	\$288.40	8.43%
MD	Queen Anne's	0	\$0.00	\$157.80	0.00%	1	\$6.00	3.66%
MD	St. Mary's	6	\$27.00	\$406.20	6.65%	6	\$27.20	7.25%
MD	Talbot	2	\$8.10	\$245.70	3.30%	2	\$8.10	3.32%
MD	Washington	6	\$20.10	\$579.60	3.47%	6	\$20.30	3.53%
MD	Wicomico	2	\$8.10	\$317.40	2.55%	2	\$8.10	2.54%
MD	Worcester	3	\$19.30	\$254.70	7.58%	3	\$19.40	8.03%
MD Recap: 215 stores with sales of \$1.42 billion. Total retail food sales for MD in the study: \$23.18 billion. CVS share of MD is 6.11%.								
PA	Adams	1	\$5.70	\$233.20	2.44%	1	\$5.70	2.60%
PA	Cumberland	12	\$56.50	\$1,249.60	4.52%	12	\$56.80	4.53%
PA	Dauphin	13	\$64.90	\$1,103.00	5.88%	13	\$65.20	5.91%
PA	Franklin	5	\$23.00	\$468.80	4.91%	5	\$23.10	4.81%
PA	Lancaster	24	\$120.60	\$1,809.20	6.67%	24	\$121.20	6.41%
PA	Lebanon	5	\$23.60	\$461.30	5.12%	5	\$23.80	4.88%
PA	York	12	\$60.90	\$1,725.40	3.53%	12	\$61.50	3.55%
PA Recap: 72 stores with sales of \$355.2 million. Total retail food sales for PA in the study: \$7.17 billion. CVS share of PA is 4.95%.								
VA	Accomack	1	\$4.90	\$104.50	4.69%	1	\$4.90	4.81%
VA	Albemarle	8	\$31.60	\$716.10	4.41%	8	\$31.90	4.56%
VA	Arlington	18	\$115.30	\$1,038.80	11.10%	19	\$117.40	11.14%
VA	Caroline	1	\$4.80	\$44.20	10.86%	1	\$4.80	10.96%
VA	Chesapeake City	6	\$43.90	\$983.60	4.46%	6	\$43.80	4.62%
VA	Chesterfield	22	\$113.50	\$1,710.90	6.63%	22	\$112.80	6.68%
VA	Culpeper	2	\$7.60	\$187.40	4.06%	2	\$7.70	4.19%
VA	Dinwiddie	1	\$5.80	\$141.70	4.09%	1	\$6.00	4.18%
VA	Fairfax	64	\$348.50	\$6,114.10	5.70%	67	\$356.10	5.93%
VA	Fauquier	1	\$4.40	\$196.80	2.24%	1	\$4.40	2.32%
VA	Frederick	8	\$32.00	\$561.90	5.69%	8	\$32.20	5.91%
VA	Greene	1	\$4.70	\$17.60	26.70%	1	\$4.90	27.68%
VA	Hampton/Newport News	8	\$39.30	\$1,314.50	2.99%	8	\$37.90	2.85%
VA	Hanover	6	\$33.80	\$531.40	6.36%	6	\$34.10	6.61%
VA	Henrico	27	\$134.50	\$2,028.10	6.63%	28	\$135.20	6.68%
VA	Isle of Wight	2	\$11.30	\$101.80	11.10%	2	\$11.10	10.61%

IN REVIEW: CVS

State	County	2024 Stores	2024 Sales (in millions)	2024 County Food Sales	% of 2024 County Market	2023 Stores	2023 Sales (in millions)	% of 2023 County Market
VA	James City	6	\$32.60	\$448.80	7.26%	6	\$32.40	7.16%
VA	King George	1	\$5.00	\$102.50	4.88%	1	\$5.00	4.82%
VA	Lancaster	1	\$3.90	\$89.90	4.34%	1	\$4.00	4.51%
VA	Loudoun	12	\$57.20	\$1,677.10	3.41%	12	\$57.50	3.53%
VA	Louisa	1	\$6.20	\$47.70	13.00%	1	\$6.30	13.24%
VA	Norfolk City	7	\$46.70	\$846.80	5.51%	7	\$44.50	5.29%
VA	Orange	2	\$12.60	\$153.10	8.23%	2	\$12.80	8.64%
VA	Page	1	\$5.10	\$74.20	6.87%	1	\$5.10	7.11%
VA	Portsmouth City	3	\$16.80	\$298.60	5.63%	3	\$16.60	5.56%
VA	Powhatan	1	\$4.90	\$82.90	5.91%	1	\$4.90	6.11%
VA	Prince George	1	\$4.80	\$82.30	5.83%	1	\$4.80	5.86%
VA	Prince William	17	\$87.60	\$2,169.60	4.04%	18	\$92.60	4.31%
VA	Shenandoah	1	\$4.30	\$124.70	3.45%	1	\$4.30	3.50%
VA	Spotsylvania	14	\$80.90	\$887.30	9.12%	14	\$81.80	9.55%
VA	Stafford	5	\$24.30	\$456.30	5.33%	5	\$24.50	5.55%
VA	Suffolk City	1	\$5.50	\$345.00	1.59%	1	\$5.50	1.66%
VA	Virginia Beach	13	\$65.70	\$1,831.90	3.59%	13	\$61.70	3.42%
VA	Warren	2	\$8.10	\$173.50	4.67%	2	\$8.10	4.75%
VA	York	1	\$4.70	\$203.90	2.31%	1	\$4.80	2.37%

VA Recap: 266 stores with sales of \$1.41 billion. Total retail food sales for VA in the study: \$26.65 billion. CVS share of VA is 5.3%.

**Mid-Atlantic Recap: 612 stores with sales of \$3.7 billion annually. Mid-Atlantic retail food sales total: \$61.3 billion.
CVS Per Store Average: \$6.04 million**

Source: *Food World*, June 2024

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VIRGINIA COUNTY SHARE OF MARKET: 2024

Total sales for those Virginia counties included in this study are \$26.65 billion

Rank	Company	Stores	Sales (in millions)	% of Market
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ACCOMACK COUNTY (\$104.5 million) (Includes Chincoteague)

- Population 33,239
- # of Households 14,252
- Median Income \$52,694
- Under age 18 20.0%
- Over age 65 26.3%
- Female 50.8%
- White 60.1%
- Black 28.0%
- Hispanic 9.7%
- Asian 0.9%

1	Walmart (SuperCenter)	1	\$42.20	40.38%
2	Food Lion	2	\$34.70	33.21%
3	Royal Farm Stores	5	\$12.70	12.15%
4	Fas-Marts	3	\$6.40	6.12%
5	Great Valu	1	\$5.50	5.26%
6	CVS	1	\$4.90	4.69%
		13	\$106.40	101.82%*



ALBEMARLE COUNTY Including CHARLOTTESVILLE (\$716.6 million) (Includes, Keswick, White Hall)

- Population 160,659
- # of Households 63,542
- Median Income \$82,442
- Under age 18 17.6%
- Over age 65 19.4%
- Female 51.7%
- White 71.3%
- Black 13.4%
- Hispanic 6.1%
- Asian 6.7%

1	Kroger	3	\$148.90	20.79%
2	Harris Teeter	3	\$77.60	10.84%
3	Wegmans	1	\$75.80	10.59%
4	Food Lion	6	\$68.90	9.62%
5	Costco	1	\$43.70	6.10%
6	Walmart (SuperCenter)	1	\$42.80	5.98%
7	Whole Foods	1	\$37.70	5.26%
8	Giant Food	1	\$37.30	5.21%
9	CVS	8	\$31.60	4.41%
10	Sam's Club	1	\$28.60	3.99%
11	Trader Joe's	1	\$23.20	3.24%
12	7-Eleven	9	\$22.60	3.16%
13	Fas-Marts	7	\$17.10	2.39%
14	Target	1	\$16.20	2.26%
15	Walgreens	2	\$10.80	1.51%
16	Great Valu	1	\$9.70	1.35%
17	Aldi	1	\$9.10	1.27%
18	Lidl	1	\$8.80	1.23%
19	Sheetz	1	\$5.30	0.74%
		50	\$715.70	99.94%



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

- Population 234,162
- # of Households 110,887
- Median Income \$137,837
- Under age 18 18.1%
- Over age 65 12.0%
- Female 49.6%
- White 59.9%
- Black 10.6%
- Hispanic 15.6%
- Asian 11.3%

1	Harris Teeter	6	\$282.40	27.19%
2	CVS	18	\$115.30	11.10%
3	Giant Food	3	\$102.30	9.85%
4	Whole Foods	3	\$91.80	8.84%
5	Albertsons (Balducci's/Safeway)	4	\$79.20	7.62%
6	Costco	1	\$79.20	7.62%
7	7-Eleven	28	\$74.70	7.19%
8	Target	3	\$62.20	5.99%
9	Military Commissaries	1	\$37.30	3.59%
10	Trader Joe's	1	\$36.50	3.51%
11	Walgreens	5	\$36.30	3.49%
12	MOM's Organic Market	1	\$16.30	1.57%
13	International Markets	1	\$13.90	1.34%
14	Lidl	1	\$9.50	0.91%
		76	\$1,036.90	99.82%



CAROLINE COUNTY (\$44.2 million) (Includes Bowling Green)

- Population 32,640
- # of Households 11,387
- Median Income \$83,562
- Under age 18 22.4%
- Over age 65 17.3%
- Female 50.0%
- White 62.4%
- Black 26.4%
- Hispanic 7.0%
- Asian 1.1%

1	Food Lion	2	\$18.00	40.72%
2	Sheetz	2	\$10.30	23.30%
3	7-Eleven	2	\$5.90	13.35%
4	Walgreens	1	\$5.00	11.31%
5	CVS	1	\$4.80	10.86%
		8	\$44.00	99.55%



CHARLES CITY COUNTY (\$5.3 million)

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

- Population 6,610
- # of Households 2,905
- Median Income \$65,573
- Under age 18 14.3%
- Over age 65 27.1%
- Female 50.3%
- White 44.7%
- Black 42.7%
- Hispanic 2.5%
- Asian 0.6%

Multi-store retailers do not operate in this county.

See VIRGINIA COUNTY SHARE on page 105

VIRGINIA COUNTY SHARE OF MARKET: 2024

Continued from page 104



CHESAPEAKE CITY (\$983.6 million)

- Population 253,886
- # of Households 91,368
- Median Income \$92,703
- Under age 18 23.8%
- Over age 65 14.6%
- Female 50.9%
- White 55.2%
- Black 30.7%
- Hispanic 7.5%
- Asian 3.9%

1	Walmart (SC/Neighborhood Mkt)	6	\$186.20	18.93%
2	Food Lion	12	\$157.20	15.98%
3	Kroger (Marketplace)	3	\$132.10	13.43%
4	7-Eleven	39	\$100.70	10.24%
5	Harris Teeter	3	\$82.50	8.39%
6	Sam's Club	2	\$80.20	8.15%
7	Wawa	6	\$49.20	5.00%
8	CVS	6	\$43.90	4.46%
9	Target	3	\$32.70	3.32%
10	BJ's Wholesale Club	1	\$31.60	3.21%
11	Walgreens	6	\$28.80	2.93%
12	Aldi	3	\$19.60	1.99%
13	Rite Aid	4	\$14.40	1.46%
14	Miller Marts	7	\$10.80	1.10%
15	Lidl	1	\$8.90	0.90%
16	Royal Farm Stores	1	\$3.20	0.33%
		103	\$982.00	99.84%



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

- Population 402,269
- # of Households 141,756
- Median Income \$83,986
- Under age 18 23.5%
- Over age 65 17.5%
- Female 53.7%
- White 62.1%
- Black 22.8%
- Hispanic 9.5%
- Asian 3.7%

1	Kroger (Marketplace)	7	\$277.40	16.21%
2	Walmart (SC/Neighborhood Mkt)	6	\$261.30	15.27%
3	Food Lion	17	\$224.10	13.10%
4	Wawa	14	\$136.34	7.97%
5	CVS	22	\$113.50	6.63%
6	7-Eleven	30	\$99.80	5.83%
7	Publix	5	\$84.60	4.94%
8	Target	5	\$70.50	4.12%
9	Wegmans	1	\$67.10	3.92%
10	Walgreens	9	\$60.20	3.52%
11	Sam's Club	2	\$57.10	3.34%
12	Costco	1	\$49.90	2.92%
13	BJ's Wholesale Club	1	\$48.80	2.85%

14	Aldi	6	\$44.00	2.57%
15	Sheetz	9	\$31.70	1.85%
16	Trader Joe's	1	\$22.40	1.31%
17	International Markets	3	\$21.90	1.28%
18	Fresh Market	2	\$16.00	0.94%
19	Lidl	2	\$15.10	0.88%
20	Rite Aid	2	\$7.20	0.42%
21	Royal Farm Stores	1	\$4.30	0.25%
22	Circle K	1	\$2.40	0.14%
23	Dash-In	1	\$2.20	0.13%
		148	\$1,717.84	100.41%*



CLARKE COUNTY (\$12.9 million) (Includes Berryville, Boyce)

- Population 15,466
- # of Households 5,617
- Median Income \$107,475
- Under age 18 19.2%
- Over age 65 23.2%
- Female 50.5%
- White 84.0%
- Black 4.3%
- Hispanic 7.8%
- Asian 1.5%

1	7-Eleven	3	\$7.60	58.91%
2	Sheetz	1	\$4.40	34.11%
		4	\$12.00	93.02%



CULPEPER COUNTY (\$187.4 million) (Includes Culpeper, Rapidan)

- Population 54,973
- # of Households 18,188
- Median Income \$92,359
- Under age 18 24.5%
- Over age 65 17.3%
- Female 49.9%
- White 68.2%
- Black 13.9%
- Hispanic 13.6%
- Asian 1.9%

1	The Giant Co. (Martin's)	1	\$48.40	25.83%
2	Walmart (SuperCenter)	1	\$36.80	19.64%
3	Albertsons (Safeway)	1	\$16.40	8.75%
4	Target	1	\$15.80	8.43%
5	7-Eleven	6	\$14.50	7.74%
6	Weis Markets	1	\$14.23	7.59%
7	Walgreens	2	\$13.10	6.99%
8	Aldi	1	\$10.20	5.44%
9	Lidl	1	\$8.20	4.38%
10	CVS	2	\$7.60	4.06%
		17	\$185.23	98.84%

See VIRGINIA COUNTY SHARE on page 106

VIRGINIA COUNTY SHARE OF MARKET: 2024

Continued from page 105



CUMBERLAND COUNTY (\$9.6 million) (Includes Cumberland)

- # of Households 4,055
- Median Income \$56,497
- Under age 18 19.4%
- Over age 65 23.6%
- Female 51.0%
- White 64.4%
- Black 29.2%
- Hispanic 3.4%
- Asian 0.6%

Multi-store retailers do not operate in this county.



DINWIDDIE COUNTY Including PETERSBURG (\$141.7 million) (Includes Dinwiddie, Church Road)

- Population 61,652
- # of Households 25,135
- Median Income \$62,077
- Under age 18 21.8%
- Over age 65 17.5%
- Female 52.6%
- White 38.9%
- Black 53.8%
- Hispanic 4.9%
- Asian 1.0%

1	Walmart (SuperCenter)	1	\$49.40	34.86%
2	Food Lion	4	\$40.90	28.86%
3	Walgreens	2	\$11.60	8.19%
4	Wawa	1	\$7.46	5.26%
5	7-Eleven	2	\$6.20	4.38%
6	International Markets	1	\$6.10	4.30%
7	CVS	1	\$5.80	4.09%
8	Rite Aid	1	\$4.70	3.32%
9	Sheetz	1	\$4.70	3.32%
10	Fas-Marts	1	\$2.30	1.62%
		15	\$139.16	98.21%



ESSEX COUNTY (\$73.8 million) (Includes Tappahannock)

- Population 10,598
- # of Households 4,258
- Median Income \$52,335
- Under age 18 17.3%
- Over age 65 24.3%
- Female 52.4%
- White 54.3%
- Black 36.6%
- Hispanic 5.0%
- Asian 1.0%

1	Walmart (SuperCenter)	1	\$47.30	64.09%
2	Food Lion	1	\$12.70	17.21%
3	Walgreens	1	\$5.50	7.45%
4	Sheetz	1	\$4.10	5.56%
5	Fas-Marts	1	\$2.50	3.39%
		5	\$72.10	97.70%



FAIRFAX CO. Including FALLS CHURCH, FAIRFAX, ALEXANDRIA (\$6.1 billion) (Includes McLean, Reston, Springfield)

- Population 1,366,531
- # of Households 500,531
- Median Income \$135,474
- Under age 18 22.4%
- Over age 65 14.2%
- Female 57.6%
- White 11.7%
- Black 11.6%
- Hispanic 15.7%
- Asian 12.1%

1	Giant Food	29	\$1,049.60	17.17%
2	Albertsons (Balducci's/Safeway)	27	\$681.50	11.15%
3	Wegmans	6	\$618.40	10.11%
4	International Markets	33	\$469.40	7.68%
5	Costco	4	\$425.60	6.96%
6	Harris Teeter	10	\$399.50	6.53%
7	CVS	64	\$348.50	5.70%
8	Whole Foods (Amazon Fresh)	10	\$333.00	5.45%
9	Walmart (SuperCenter)	8	\$271.50	4.44%
10	7-Eleven	139	\$261.30	4.27%
11	Target	10	\$245.50	4.02%
12	Trader Joe's	8	\$233.40	3.82%
13	Aldi	14	\$146.10	2.39%
14	BJ's Wholesale Club	3	\$140.40	2.30%
15	Walgreens	21	\$130.40	2.13%
16	Lidl	9	\$90.40	1.48%
17	Military Commissaries	1	\$72.30	1.18%
18	MOM's Organic Market	3	\$55.20	0.90%
19	Food Lion	2	\$32.10	0.53%
20	Shoppers	1	\$32.10	0.53%
21	Fresh Market	2	\$25.90	0.42%
22	Sprouts	1	\$20.10	0.33%
23	Wawa	3	\$16.76	0.27%
24	Sheetz	2	\$8.90	0.15%
25	ASG	1	\$4.60	0.08%
26	Dash-In	1	\$2.60	0.04%
27	Circle K	1	\$2.10	0.03%
28	C&S Independents	3	\$0.73	0.01%
		416	\$6,117.89	100.06%*



FAUQUIER COUNTY (\$196.8 million) (Includes Remington, Warrenton)

- Population 75,165
- # of Households 26,011
- Median Income \$122,785
- Under age 18 22.9%
- Over age 65 17.7%
- Female 49.8%
- White 76.5%
- Black 7.8%
- Hispanic 11.4%
- Asian 1.9%

1	Walmart (SuperCenter)	1	\$41.40	21.04%
2	Giant Food	1	\$33.20	16.87%

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VIRGINIA COUNTY SHARE OF MARKET: 2024

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3	Food Lion	3	\$25.30	12.86%
4	Albertsons (Safeway)	1	\$21.80	11.08%
5	Harris Teeter	1	\$20.30	10.32%
6	Sheetz	3	\$13.10	6.66%
7	Walgreens	2	\$11.20	5.69%
8	Wawa	2	\$10.58	5.38%
9	7-Eleven	3	\$8.20	4.17%
10	CVS	1	\$4.40	2.24%
11	Royal Farm Stores	1	\$4.20	2.13%
12	Circle K	1	\$2.30	1.17%
		20	\$195.98	99.58%

6	Wawa	1	\$8.10	5.80%
7	Walgreens	1	\$6.10	4.37%
8	Rite Aid	1	\$4.60	3.29%
		17	\$138.10	98.85%



GOOCHLAND COUNTY (\$47.7 million) (Includes Goochland, Manakin)

• Population	27,197	• Female	50.5%
• # of Households	9,788	• White	78.9%
• Median Income	\$105,600	• Black	14.0%
• Under age 18	16.3%	• Hispanic	3.5%
• Over age 65	24.9%	• Asian	1.9%

1	Food Lion	3	\$37.40	78.41%
2	Wawa	1	\$9.51	19.94%
		4	\$46.91	98.34%



FREDERICK COUNTY (\$561.9 million) (Includes Stephens City)

• Population	123,611	• Female	50.2%
• # of Households	44,751	• White	71.7%
• Median Income	\$77,469	• Black	8.3%
• Under age 18	22.3%	• Hispanic	15.6%
• Over age 65	18.2%	• Asian	2.5%

1	Walmart (SuperCenter)	3	\$170.60	30.36%
2	The Giant Co. (Martin's)	3	\$168.60	30.01%
3	Costco	1	\$62.00	11.03%
4	Sheetz	7	\$32.40	5.77%
5	CVS	8	\$32.00	5.69%
6	Target	2	\$28.90	5.14%
7	Walgreens	3	\$17.20	3.06%
8	Sharp Shopper	1	\$17.10	3.04%
9	7-Eleven	9	\$15.60	2.78%
10	Aldi	1	\$9.30	1.66%
11	Royal Farm Stores	1	\$4.10	0.73%
12	Circle K	1	\$2.00	0.36%
		40	\$559.80	99.63%



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

• Population	21,301	• Female	50.4%
• # of Households	7,662	• White	79.9%
• Median Income	\$81,338	• Black	7.6%
• Under age 18	23.2%	• Hispanic	7.4%
• Over age 65	19.2%	• Asian	2.4%

1	Food Lion	1	\$10.80	61.36%
2	CVS	1	\$4.70	26.70%
		2	\$15.50	88.07%



HAMPTON/NEWPORT NEWS CITY (\$1.3 billion)

• Population	320,216	• Female	51.6%
• # of Households	132,935	• White	38.0%
• Median Income	\$63,892	• Black	47.8%
• Under age 18	22.2%	• Hispanic	8.6%
• Over age 65	15.4%	• Asian	3.0%

1	Food Lion	16	\$306.80	23.34%
2	Walmart (SC/Neighborhood Mkt)	5	\$175.30	13.34%
3	7-Eleven	61	\$149.60	11.38%
4	Military Commissaries	2	\$64.00	4.87%
5	Wawa	7	\$56.75	4.32%
6	Walgreens	8	\$53.40	4.06%
7	Harris Teeter	2	\$43.50	3.31%
8	Costco	1	\$43.10	3.28%
9	BJ's Wholesale Club	1	\$40.80	3.10%
10	Sam's Club	1	\$40.30	3.07%
11	CVS	8	\$39.30	2.99%
12	Kroger	1	\$33.40	2.54%
13	Whole Foods	1	\$32.90	2.50%
14	Target	2	\$29.30	2.23%

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GLOUCESTER COUNTY (\$139.7 million) (Includes Gloucester)

• Population	40,057	• Female	50.5%
• # of Households	14,857	• White	84.1%
• Median Income	\$83,750	• Black	8.0%
• Under age 18	19.8%	• Hispanic	4.5%
• Over age 65	21.0%	• Asian	0.9%

1	Walmart (SuperCenter)	1	\$41.70	29.85%
2	Food Lion	2	\$24.30	17.39%
3	Kroger	1	\$22.60	16.18%
4	7-Eleven	9	\$19.10	13.67%
5	Aldi	1	\$11.60	8.30%

VIRGINIA COUNTY SHARE OF MARKET: 2024

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15	Aldi	3	\$26.30	2.00%
16	Lidl	2	\$18.30	1.39%
17	Trader Joe's	1	\$17.10	1.30%
18	Rite Aid	4	\$15.90	1.21%
19	Fresh Market	1	\$13.10	1.00%
20	International Markets	1	\$12.80	0.97%
21	Miller Marts	4	\$8.80	0.67%
22	Circle K	1	\$2.20	0.17%
		133	\$1,222.95	93.04%

5	CVS	27	\$134.50	6.63%
6	7-Eleven	56	\$122.30	6.03%
7	Target	6	\$105.20	5.19%
8	Walgreens	16	\$105.20	5.19%
9	Wawa	11	\$102.18	5.04%
10	Wegmans	1	\$68.90	3.40%
11	Costco	1	\$51.90	2.56%
12	Aldi	6	\$48.00	2.37%
13	Whole Foods	2	\$47.60	2.35%
14	BJ's Wholesale Club	1	\$46.90	2.31%
15	Sam's Club	1	\$44.80	2.21%
16	International Markets	2	\$31.40	1.55%
17	Fresh Market	2	\$25.90	1.28%
18	Lidl	3	\$24.40	1.20%
19	Fas-Marts	14	\$20.30	1.00%
20	Trader Joe's	1	\$20.30	1.00%
21	Sheetz	3	\$11.30	0.56%
22	Rite Aid	2	\$9.70	0.48%
23	Save A Lot	2	\$8.40	0.41%
24	Dash-In	2	\$5.00	0.25%
25	Great Valu	1	\$5.00	0.25%
26	Royal Farm Stores	1	\$4.40	0.22%
27	Miller Marts	1	\$2.50	0.12%
		201	\$2,025.88	99.89%



HANOVER COUNTY (\$531.4 million) (Includes Ashland, Mechanicsville)

• Population	114,148	• Female	50.4%
• # of Households	41,383	• White	82.3%
• Median Income	\$104,678	• Black	9.6%
• Under age 18	21.3%	• Hispanic	3.6%
• Over age 65	19.4%	• Asian	2.3%

1	Walmart (SC/Neighborhood Mkt)	3	\$119.70	22.53%
2	Kroger (Marketplace)	2	\$106.90	20.12%
3	Food Lion	6	\$76.10	14.32%
4	Wawa	4	\$38.99	7.34%
5	BJ's Wholesale Club	1	\$36.90	6.94%
6	CVS	6	\$33.80	6.36%
7	7-Eleven	9	\$26.80	5.04%
8	Target	1	\$18.00	3.39%
9	Publix	1	\$17.60	3.31%
10	Walgreens	3	\$16.70	3.14%
11	Sheetz	3	\$10.80	2.03%
12	Fas-Marts	6	\$10.10	1.90%
13	Aldi	1	\$9.40	1.77%
14	Dash-In	2	\$5.30	1.00%
15	Circle K	1	\$2.00	0.38%
		49	\$529.09	99.57%



ISLE OF WIGHT COUNTY (\$101.8 million) (Includes Smithfield)

• Population	40,711	• Female	50.5%
• # of Households	15,196	• White	69.2%
• Median Income	\$91,680	• Black	22.7%
• Under age 18	21.3%	• Hispanic	4.6%
• Over age 65	20.1%	• Asian	1.1%

1	Food Lion	3	\$36.90	36.25%
2	Kroger	1	\$29.60	29.08%
3	7-Eleven	4	\$12.30	12.08%
4	CVS	2	\$11.30	11.10%
5	Rite Aid	1	\$4.50	4.42%
6	Royal Farm Stores	1	\$3.10	3.05%
7	Miller Marts	1	\$2.30	2.26%
		13	\$100.00	98.23%



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

• Population	564,007	• Female	52.5%
• # of Households	235,295	• White	47.0%
• Median Income	\$71,015	• Black	37.6%
• Under age 18	19.4%	• Hispanic	7.4%
• Over age 65	15.8%	• Asian	6.3%

1	Kroger (Marketplace)	9	\$307.20	15.15%
2	Walmart (SC/Neighborhood Mkt)	6	\$304.20	15.00%
3	Food Lion	14	\$207.30	10.22%
4	Publix	10	\$161.10	7.94%

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VIRGINIA COUNTY SHARE OF MARKET: 2024

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JAMES CITY CO. Including WILLIAMSBURG (\$448.8 million) (Includes Norge, Toano)

• Population	98,501	• Female	52.6%
• # of Household.....	35,572	• White	70.6%
• Median Income	\$83,763	• Black.....	14.7%
• Under age 18.....	15.1%	• Hispanic	7.6%
• Over age 65.....	22.2%	• Asian.....	4.4%

1	Harris Teeter	3	\$110.40	24.60%
2	Walmart (SC/Neighborhood Mkt)	2	\$81.80	18.23%
3	Food Lion	5	\$63.50	14.15%
4	CVS	6	\$32.60	7.26%
5	7-Eleven	13	\$29.10	6.48%
6	Target	2	\$26.90	5.99%
7	Wawa	3	\$21.43	4.77%
8	Trader Joe's	1	\$19.30	4.30%
9	Publix	1	\$14.40	3.21%
10	Fresh Market	1	\$14.10	3.14%
11	Aldi	1	\$9.10	2.03%
12	Walgreens	1	\$7.40	1.65%
13	Fas-Marts	2	\$5.00	1.11%
14	Miller Marts	2	\$2.40	0.53%
		43	\$437.43	97.47%



KING & QUEEN COUNTY (\$6.1 million) (Includes King & Queen Courthouse)

• Population	6,720	• Female	48.9%
• # of Households.....	2,826	• White	66.7%
• Median Income	\$70,147	• Black.....	24.0%
• Under age 18.....	17.8%	• Hispanic	3.9%
• Over age 65.....	23.9%	• Asian.....	0.5%

Multi-store retailers do not operate in this county.



KING GEORGE COUNTY (\$102.5 million) (Includes King George)

• Population	28,568	• Female	49.1%
• # of Households.....	9,737	• White	71.5%
• Median Income	\$103,264	• Black.....	16.3%
• Under age 18.....	24.4%	• Hispanic	7.1%
• Over age 65.....	14.4%	• Asian.....	1.9%

1	Walmart (SuperCenter)	1	\$40.00	39.02%
2	Food Lion	2	\$28.20	27.51%
3	Sheetz	3	\$13.50	13.17%
4	Wawa	1	\$7.54	7.36%
5	CVS	1	\$5.00	4.88%
6	7-Eleven	2	\$3.90	3.80%

7	Military Commissaries	1	\$2.40	2.34%
		11	\$100.54	98.09%



KING WILLIAM COUNTY (\$40.6 million) (Includes West Point)

• Population	19,030	• Female	50.5%
• # of Households.....	6,893	• White	77.1%
• Median Income	\$79,398	• Black.....	14.8%
• Under age 18.....	22.3%	• Hispanic	3.1%
• Over age 65.....	17.1%	• Asian.....	1.4%

1	Food Lion	2	\$31.90	78.57%
2	7-Eleven	2	\$4.80	11.82%
3	Fas-Marts	1	\$2.50	6.16%
		5	\$39.20	96.55%



LANCASTER COUNTY (\$89.9 million) (Includes Kilmarnock)

• Population	10,859	• Female	52.3%
• # of Households.....	5,238	• White	68.6%
• Median Income	\$62,674	• Black.....	26.7%
• Under age 18.....	14.7%	• Hispanic	2.7%
• Over age 65.....	38.6%	• Asian.....	1.0%

1	Walmart (SuperCenter)	1	\$42.30	47.05%
2	Food Lion	1	\$15.80	17.58%
3	Great Valu	1	\$15.70	17.46%
4	Walgreens	1	\$6.10	6.79%
5	CVS	1	\$3.90	4.34%
6	Fas-Marts	1	\$2.50	2.78%
		6	\$86.30	96.00%



LOUDOUN COUNTY (\$1.7 billion) (Includes Ashburn, Leesburg, Sterling)

• Population	436,347	• Female	49.8%
• # of Households.....	138,549	• White	52.1%
• Median Income	\$170,463	• Black.....	8.2%
• Under age 18.....	26.4%	• Hispanic	14.0%
• Over age 65.....	10.8%	• Asian.....	22.6%

1	Giant Food	9	\$257.40	15.35%
2	Harris Teeter	9	\$247.40	14.75%
3	Wegmans	2	\$196.40	11.71%
4	Costco	2	\$182.30	10.87%
5	Walmart (SuperCenter)	3	\$137.10	8.17%
6	International Markets	4	\$73.80	4.40%
7	7-Eleven	33	\$68.20	4.07%
8	Target (Super Target)	3	\$64.80	3.86%
9	Albertsons (Safeway)	4	\$58.90	3.51%
10	CVS	12	\$57.20	3.41%
11	Walgreens	10	\$55.90	3.33%
12	Aldi	4	\$43.50	2.59%

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VIRGINIA COUNTY SHARE OF MARKET: 2024

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13	Food Lion	3	\$41.50	2.47%
14	Sam's Club	1	\$41.50	2.47%
15	Trader Joe's	2	\$38.20	2.28%
16	Whole Foods	1	\$34.30	2.05%
17	Sheetz	7	\$32.90	1.96%
18	Lidl	3	\$23.90	1.43%
19	Wawa	2	\$13.65	0.81%
20	Royal Farm Stores	2	\$5.10	0.30%
21	Circle K	1	\$2.10	0.13%
		117	\$1,676.05	99.94%



LOUISA COUNTY (\$47.7 million) (Includes Louisa, Mineral)

- Population 41,037
- # of Households 14,642
- Median Income \$76,594
- Under age 18 19.8%
- Over age 65 21.2%
- Female 49.8%
- White 77.8%
- Black 14.7%
- Hispanic 4.2%
- Asian 0.7%

1	Food Lion	2	\$23.40	49.06%
2	Sheetz	2	\$10.20	21.38%
3	CVS	1	\$6.20	13.00%
4	Walgreens	1	\$5.70	11.95%
		6	\$45.50	95.39%



MADISON COUNTY (\$15.1 million) (Includes Madison)

- Population 14,128
- # of Households 5,324
- Median Income \$74,586
- Under age 18 19.7%
- Over age 65 23.6%
- Female 51.2%
- White 84.0%
- Black 8.6%
- Hispanic 3.8%
- Asian 0.9%

1	Food Lion	1	\$14.90	98.68%
		1	\$14.90	98.68%



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

- Population 8,514
- # of Households 3,742
- Median Income \$5,324
- Under age 18 15.2%
- Over age 65 32.7%
- Female 50.8%
- White 85.2%
- Black 8.0%
- Hispanic 3.2%
- Asian 0.9%

1	Food Lion	1	\$15.10	98.69%
		1	\$15.10	98.69%



MIDDLESEX COUNTY (\$28.5 million) (Includes Urbanna)

- Population 10,924
- # of Households 4,714
- Median Income \$69,389
- Under age 18 16.0%
- Over age 65 33.1%
- Female 50.3%
- White 77.7%
- Black 15.7%
- Hispanic 3.3%
- Asian 0.6%

1	Food Lion	1	\$15.30	53.68%
2	7-Eleven	4	\$11.60	40.70%
		5	\$26.90	94.39%



NEW KENT COUNTY (\$69.9 million) (Includes New Kent, Providence, Forge)

- Population 26,134
- # of Households 8,675
- Median Income \$113,120
- Under age 18 19.2%
- Over age 65 18.6%
- Female 48.2%
- White 76.7%
- Black 14.6%
- Hispanic 4.3%
- Asian 1.3%

1	Food Lion	4	\$52.90	75.68%
2	Walgreens	2	\$10.30	14.74%
3	Fas-Marts	2	\$5.70	8.15%
4	7-Eleven	1	\$3.40	4.86%
		9	\$72.30	103.43%*



NORFOLK CITY (\$846.8 million)

- Population 230,930
- # of Households 93,797
- Median Income \$60,998
- Under age 18 20.1%
- Over age 65 13.1%
- Female 49.3%
- White 42.5%
- Black 41.9%
- Hispanic 9.3%
- Asian 4.1%


1	Walmart (SC/Neighborhood Mkt)	4	\$180.30	21.29%
2	Food Lion	8	\$144.30	17.04%
3	7-Eleven	45	\$111.80	13.20%
4	Harris Teeter	3	\$73.70	8.70%
5	Costco	1	\$51.80	6.12%
6	CVS	7	\$46.70	5.51%
7	Walgreens	5	\$35.10	4.15%
8	Wawa	4	\$32.49	3.84%
9	BJ's Wholesale Club	1	\$31.50	3.72%
10	Military Commissaries	1	\$30.50	3.60%
11	Aldi	3	\$25.70	3.03%
12	Fresh Market	1	\$17.90	2.11%
13	Target	1	\$15.00	1.77%
14	Miller Marts	6	\$12.80	1.51%
15	Rite Aid	3	\$10.70	1.26%
16	Lidl	1	\$9.20	1.09%
17	Royal Farm Stores	2	\$7.30	0.86%

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VIRGINIA COUNTY SHARE OF MARKET: 2024

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18	Save-A-Lot	1	\$5.10	0.60%
		97	\$841.89	99.42%



NORTHAMPTON COUNTY (\$40.8 million)
(Includes Cape Charles, Exmore)

- Population 12,021
- # of Households 5,344
- Median Income \$54,693
- Under age 18 18.2%
- Over age 65 29.5%
- Female 52.3%
- White 56.8%
- Black 30.9%
- Hispanic 9.7%
- Asian 1.1%


1	Food Lion	2	\$22.90	56.13%
2	Royal Farm Stores	2	\$6.40	15.69%
3	Fas-Marts	2	\$5.80	14.22%
4	Walgreens	1	\$5.10	12.50%
		7	\$40.20	98.53%



NORTHUMBERLAND COUNTY (\$22.6 million)
(Includes Heathsville)

- Population 12,391
- # of Households 5,174
- Median Income \$64,655
- Under age 18 13.7%
- Over age 65 37.2%
- Female 50.4%
- White 69.8%
- Black 23.4%
- Hispanic 4.3%
- Asian 0.7%


1	Food Lion	1	\$14.80	65.49%
2	Walgreens	1	\$5.10	22.57%
3	Fas-Marts	1	\$2.20	9.73%
		3	\$22.10	97.79%



NOTTOWAY COUNTY (\$41.9 million)
(Includes Crewe, Nottoway)

- Population 15,566
- # of Households 5,415
- Median Income \$62,366
- Under age 18 19.6%
- Over age 65 18.4%
- Female 46.9%
- White 54.5%
- Black 38.6%
- Hispanic 5.1%
- Asian 0.6%

1	Walmart (SuperCenter)	1	\$38.90	92.84%
2	Fas-Marts	1	\$2.80	6.68%
		2	\$41.70	99.52%




ORANGE COUNTY (\$153.1million)
(Includes Gordonsville, Orange)

- Population 38,574
- # of Households 14,309
- Median Income \$87,309
- Under age 18 21.3%
- Over age 65 20.6%
- Female 51.1%
- White 76.0%
- Black 13.0%
- Hispanic 6.8%
- Asian 1.3%

1	Walmart (SuperCenter)	2	\$74.20	48.47%
2	Food Lion	3	\$31.20	20.38%


3	Target	1	\$16.50	10.78%
4	CVS	2	\$12.60	8.23%
5	Sheetz	2	\$9.30	6.07%
6	7-Eleven	4	\$9.20	6.01%
7	Fas-Marts	2	\$4.60	3.00%
		16	\$157.60	102.94%*



PAGE COUNTY (\$74.2 million)
(Includes Elgin, Luray)

- Population 23,741
- # of Households 9,351
- Median Income \$56,760
- Under age 18 19.7%
- Over age 65 22.3%
- Female 50.2%
- White 92.9%
- Black 2.4%
- Hispanic 2.6%
- Asian 0.5%

1	Walmart (SuperCenter)	1	\$45.30	61.05%
2	Food Lion	2	\$12.20	16.44%
3	7-Eleven	2	\$6.50	8.76%
4	CVS	1	\$5.10	6.87%
5	Circle K	1	\$2.40	3.23%
		7	\$71.50	96.36%



PORTSMOUTH CITY (\$298.6 million)

- Population 96,793
- # of Households 38,962
- Median Income \$57,154
- Under age 18 22.9%
- Over age 65 15.4%
- Female 51.8%
- White 36.1%
- Black 54.8%
- Hispanic 5.6%
- Asian 1.5%

1	Food Lion	5	\$78.00	26.12%
2	Kroger (Marketplace)	1	\$43.90	14.70%
3	Walmart (SuperCenter)	1	\$34.60	11.59%
4	Harris Teeter	1	\$25.90	8.67%
5	7-Eleven	13	\$25.70	8.61%
6	Wawa	3	\$19.23	6.44%
7	CVS	3	\$16.80	5.63%
8	Military Commissaries	1	\$15.70	5.26%
9	Walgreens	2	\$12.90	4.32%
10	Aldi	1	\$9.50	3.18%
11	Royal Farm Stores	2	\$8.60	2.88%
12	Rite Aid	1	\$4.60	1.54%
		34	\$295.43	98.94%

See VIRGINIA COUNTY SHARE on page 112

VIRGINIA COUNTY SHARE OF MARKET: 2024

Continued from page 111



POWHATAN COUNTY (\$82.9 million) (Includes Powhatan)

- Population 32,105
- # of Households 11,077
- Median Income \$108,089
- Under age 18 18.0%
- Over age 65 20.1%
- Female 47.9%
- White 86.3%
- Black 8.6%
- Hispanic 2.7%
- Asian 0.7%

1	Walmart (SuperCenter)	1	\$43.50	52.47%
2	Food Lion	2	\$24.90	30.04%
3	Sheetz	2	\$8.40	10.13%
4	CVS	1	\$4.90	5.91%
		6	\$81.70	98.55%



PRINCE GEORGE CO. Including HOPEWELL (\$82.3 million) (Includes Prince George)

- Population 65,623
- # of Households 22,156
- Median Income \$65,489
- Under age 18 22.3%
- Over age 65 14.9%
- Female 48.3%
- White 47.3%
- Black 39.0%
- Hispanic 9.5%
- Asian 1.8%

1	Military Commissaries	1	\$28.30	34.39%
2	Food Lion	2	\$22.90	27.83%
3	7-Eleven	2	\$5.50	6.68%
4	Walgreens	1	\$5.00	6.08%
5	CVS	1	\$4.80	5.83%
6	Rite Aid	2	\$4.70	5.71%
7	Save A Lot	1	\$4.10	4.98%
8	Sheetz	1	\$3.80	4.62%
		11	\$79.10	96.11%



PRINCE WILLIAM CO. Including MANASSAS, MANASSAS PK. (\$2.2 billion) (Includes Dale City, Quantico, Woodbridge)

- Population 548,697
- # of Households 171,677
- Median Income \$108,475
- Under age 18 25.0%
- Over age 65 10.9%
- Female 49.1%
- White 34.6%
- Black 17.6%
- Hispanic 36.7%
- Asian 9.8%

1	International Markets	12	\$277.70	12.80%
2	Wegmans	2	\$226.50	10.44%
3	Giant Food	8	\$225.40	10.39%
4	7-Eleven	66	\$183.40	8.45%
5	Food Lion	9	\$142.30	6.56%
6	Walmart (SuperCenter)	5	\$140.10	6.46%
7	Harris Teeter	4	\$138.90	6.40%
8	Costco	2	\$93.60	4.31%

9	Albertsons (Safeway)	4	\$90.30	4.16%
10	CVS	17	\$87.60	4.04%
11	Aldi	6	\$68.20	3.14%
12	BJ's Wholesale Club	2	\$66.80	3.08%
13	Target (Super Target)	4	\$66.30	3.06%
14	Walgreens	9	\$61.60	2.84%
15	Wawa	7	\$54.18	2.50%
16	Lidl	4	\$51.50	2.37%
17	Sheetz	11	\$50.30	2.32%
18	Military Commissaries	1	\$43.80	2.02%
19	Sam's Club	1	\$33.90	1.56%
20	Shoppers	1	\$28.40	1.31%
21	Sprouts	1	\$15.30	0.71%
22	MOM's Organic Market	1	\$13.70	0.63%
23	Whole Foods	1	\$7.20	0.33%
24	C&S Independents	1	\$0.32	0.01%
		179	\$2,167.30	99.89%



RAPPAHANNOCK COUNTY (\$5.4 million) (Includes Washington)

- Population 7,414
- # of Households 2,823
- Median Income \$98,663
- Under age 18 16.5%
- Over age 65 29.0%
- Female 50.0%
- White 87.4%
- Black 4.0%
- Hispanic 5.0%
- Asian 1.2%

Multi-store retailers do not operate in this county.



RICHMOND COUNTY (\$24.0 million) (Includes Elevation, Warsaw)

- Population 9,184
- # of Households 2,834
- Median Income \$62,708
- Under age 18 17.7%
- Over age 65 21.5%
- Female 43.4%
- White 59.9%
- Black 29.4%
- Hispanic 7.9%
- Asian 0.6%

1	Food Lion	1	\$14.80	61.67%
2	Walgreens	1	\$4.80	20.00%
3	7-Eleven	1	\$2.50	10.42%
		3	\$22.10	92.08%



SHENANDOAH COUNTY (\$124.7 million) (Includes Strasburg, Woodstock)

- Population 45,228
- # of Households 17,542
- Median Income \$62,149
- Under age 18 21.0%
- Over age 65 22.4%
- Female 50.5%
- White 85.2%
- Black 3.2%
- Hispanic 8.7%
- Asian 1.2%


1	Food Lion	3	\$45.30	36.33%
2	Walmart (SuperCenter)	1	\$40.80	32.72%

See VIRGINIA COUNTY SHARE on page 113

VIRGINIA COUNTY SHARE OF MARKET: 2024

Continued from page 112


3	7-Eleven	5	\$10.40	8.34%
4	Sheetz	2	\$9.80	7.86%
5	Walgreens	2	\$9.20	7.38%
6	CVS	1	\$4.30	3.45%
7	Circle K	1	\$2.80	2.25%
		15	\$122.60	98.32%



SOUTHAMPTON COUNTY (\$95.2 million)
(Includes Courtland)

- Population 73,524
- # of Households 28,863
- Median Income \$67,044
- Under age 18 18.3%
- Over age 65 23.7%
- Female 49.0%
- White 74.1%
- Black 20.7%
- Hispanic 3.0%
- Asian 0.5%

1	Walmart (SuperCenter)	1	\$48.30	50.74%
2	Food Lion	2	\$31.70	33.30%
3	7-Eleven	3	\$7.10	7.46%
4	Walgreens	1	\$5.90	6.20%
		7	\$93.00	97.69%




SPOTSYLVANIA COUNTY Including FREDERICKSBURG (\$887.3 million)
(Includes Spotsylvania)

- Population 178,516
- # of Households 60,725
- Median Income \$94,256
- Under age 18 22.5%
- Over age 65 13.6%
- Female 51.6%
- White 59.7%
- Black 21.6%
- Hispanic 12.4%
- Asian 3.3%

1	Walmart (SuperCenter)	4	\$182.30	20.55%
2	Giant Food	2	\$98.10	11.06%
3	CVS	14	\$80.90	9.12%
4	Wegmans	1	\$76.80	8.66%
5	Wawa	10	\$72.23	8.14%
6	Weis Markets	5	\$59.99	6.76%
7	7-Eleven	21	\$51.70	5.83%
8	Costco	1	\$37.10	4.18%
9	Target	2	\$35.60	4.01%
10	BJ's Wholesale Club	1	\$33.70	3.80%
11	Walgreens	4	\$26.60	3.00%
12	Lidl	2	\$23.40	2.64%
13	Sheetz	6	\$22.50	2.54%
14	Aldi	3	\$18.60	2.10%
15	Royal Farm Stores	5	\$17.70	1.99%
16	Publix	1	\$15.30	1.72%
17	Food Lion	1	\$12.90	1.45%
18	Fas-Marts	8	\$12.70	1.43%


19	Miller Marts	1	\$1.90	0.21%
		92	\$880.02	99.18%



STAFFORD COUNTY (\$456.3 million)
(Includes Aquia, Falmouth, Stafford)

- Population 165,428
- # of Households 50,313
- Median Income \$128,036
- Under age 18 25.9%
- Over age 65 11.6%
- Female 49.2%
- White 54.4%
- Black 21.9%
- Hispanic 16.3%
- Asian 4.2%

1	Giant Food	3	\$125.60	27.53%
2	Walmart (superCenter)	2	\$74.60	16.35%
3	Wawa	7	\$51.70	11.33%
4	Target	2	\$37.90	8.31%
5	Weis Markets	3	\$36.53	8.01%
6	7-Eleven	11	\$30.50	6.68%
7	Shoppers	1	\$28.50	6.25%
8	CVS	5	\$24.30	5.33%
9	Publix	1	\$17.10	3.75%
10	Sheetz	2	\$11.50	2.52%
11	Aldi	1	\$9.10	1.99%
12	Fas-Marts	1	\$2.50	0.55%
13	Circle K	1	\$2.30	0.50%
		40	\$452.13	99.09%



SUFFOLK CITY (\$345.0 million)

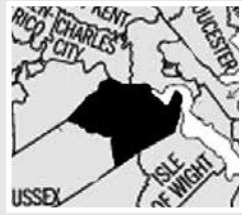
- Population 100,659
- # of Households 36,318
- Median Income \$87,758
- Under age 18 23.4%
- Over age 65 15.3%
- Female 51.1%
- White 47.4%
- Black 43.2%
- Hispanic 5.2%
- Asian 2.3%

1	Walmart (SuperCenter)	2	\$83.50	24.20%
2	Kroger (Marketplace)	2	\$77.90	22.58%
3	Food Lion	5	\$52.40	15.19%
4	7-Eleven	12	\$31.40	9.10%
5	Harris Teeter	1	\$28.90	8.38%
6	Publix	1	16.1	4.66%
7	Walgreens	3	\$15.70	4.55%
8	Aldi	1	\$12.50	3.62%
9	Rite Aid	2	\$9.10	2.64%
10	Lidl	1	\$9.00	2.61%
11	Wawa	1	\$7.96	2.31%
12	CVS	1	\$5.50	1.59%
13	Miller Marts	2	\$4.10	1.19%
14	Royal Farm Stores	1	\$4.10	1.19%
		35	\$358.16	103.81%*

See VIRGINIA COUNTY SHARE on page 114

VIRGINIA COUNTY SHARE OF MARKET: 2024

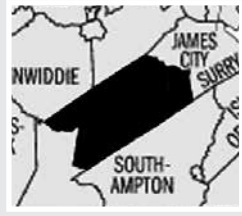
Continued from page 113



SURRY COUNTY (\$3.6 million) (Includes Surry)

- Population 6,593
- # of Households 2,745
- Median Income \$68,655
- Under age 18 16.8%
- Over age 65 25.5%
- Female 49.8%
- White 55.3%
- Black 38.9%
- Hispanic 3.0%
- Asian 0.6%

1	7-Eleven	1	\$2.30	63.89%
		1	\$2.30	63.89%



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

- Population 10,757
- # of Households 3,698
- Median Income \$59,195
- Under age 18 15.8%
- Over age 65 19.0%
- Female 41.1%
- White 40.9%
- Black 53.7%
- Hispanic 4.0%
- Asian 0.5%

1	7-Eleven	1	\$3.20	39.51%
		1	\$3.20	39.51%



VIRGINIA BEACH CITY (\$1.8 billion)

- Population 453,649
- # of Households 178,915
- Median Income \$87,544
- Under age 18 21.7%
- Over age 65 16.0%
- Female 50.8%
- White 59.9%
- Black 20.4%
- Hispanic 9.0%
- Asian 7.8%

1	Food Lion	21	\$272.10	14.85%
2	Walmart (SC/Neighborhood Mkt)	7	\$264.30	14.43%
3	Harris Teeter	9	\$214.40	11.70%
4	7-Eleven	81	\$185.20	10.11%
5	Kroger (Marketplace)	5	\$163.20	8.91%
6	Wawa	10	\$81.28	4.44%
7	Walgreens	14	\$79.60	4.35%
8	Wegmans	1	\$73.10	3.99%
9	CVS	13	\$65.70	3.59%
10	Target	4	\$65.10	3.55%
11	Aldi	6	\$52.80	2.88%
12	Sam's Club	1	\$46.90	2.56%
13	BJ's Wholesale Club	1	\$43.60	2.38%
14	Military Commissaries	1	\$42.30	2.31%
15	Whole Foods	1	\$36.70	2.00%
16	International Markets	2	\$30.50	1.66%
17	Lidl	4	\$28.60	1.56%

18	Fresh Market	2	\$27.60	1.51%
19	Rite Aid	9	\$26.20	1.43%
20	Trader Joe's	1	\$20.30	1.11%
21	Miller Marts	6	\$12.50	0.68%
22	Royal Farm Stores	2	\$8.10	0.44%
		201	\$1,840.08	100.45%*



WARREN COUNTY (\$173.5 million) (Includes Front Royal)

- Population 41,843
- # of Households 15,235
- Median Income \$79,313
- Under age 18 21.5%
- Over age 65 17.7%
- Female 49.5%
- White 83.0%
- Black 5.1%
- Hispanic 7.5%
- Asian 1.4%

1	The Giant Co.(Martin's)	1	\$65.40	37.69%
2	Walmart (SuperCenter)	1	\$47.00	27.09%
3	Target	1	\$18.00	10.37%
4	7-Eleven	8	\$14.40	8.30%
5	Aldi	1	\$8.60	4.96%
6	CVS	2	\$8.10	4.67%
7	Sheetz	1	\$5.90	3.40%
8	Royal Farm Stores	1	\$2.60	1.50%
9	Circle K	1	\$1.90	1.10%
		17	\$171.90	99.08%



WESTMORELAND COUNTY (\$50.3 million) (Includes Colonial Beach)

- Population 19,013
- # of Households 7,832
- Median Income \$56,647
- Under age 18 18.1%
- Over age 65 27.2%
- Female 50.3%
- White 64.0%
- Black 25.0%
- Hispanic 7.1%
- Asian 0.9%

1	Food Lion	2	\$28.20	56.06%
2	Walgreens	2	\$9.50	18.89%
3	Great Valu	1	\$6.40	12.72%
4	7-Eleven	1	\$3.10	6.16%
5	Fas-Marts	1	\$2.40	4.77%
		7	\$49.60	98.61%

See VIRGINIA COUNTY SHARE on page 115

PEOPLE

The Giant Company announced last month that **John MacDonald** has been named vice president of marketing. MacDonald will report directly to John Ruane, president.

“John is a passionate and talented marketer, with a knack for building dynamic teams that deliver creative and strategic marketing initiatives to drive results,” said Ruane. “With his extensive knowledge of both our business and customers, I’m excited to see how John will elevate The Giant Company brand and deepen the relationships we have with our loyal customers.”

A veteran of the retail and healthcare industries with more than 30 years of experience, MacDonald first joined Carlisle, PA-based division of Ahold Delhaize USA in 2012

as director of marketing. Before his tenure with the company, MacDonald held a variety of roles at Ahold Financial Services and served as the vice president of marketing at its Landover, MD-based Giant Food division. Before returning to The Giant Company, MacDonald served as chief marketing officer for FreshDirect.

MacDonald earned his bachelor’s degree in marketing from Bloomsburg University and his MBA from Lebanon Valley College. He has completed executive education coursework at Harvard and holds a Six Sigma Black Belt certification.

He currently serves as a marketing adjunct professor at Penn State Harrisburg and has taught undergrad and gradu-



John MacDonald

ate level courses at both Elizabethtown College and Lebanon Valley College.

DMS Food Imports last month announced that **Mark Bradford** has been appointed as its senior sales manager.



Mark Bradford

Bradford joins the Edgewater, MD-based importer of frozen, refrigerated and shelf stable food items from around the world, from Cherry Central where he held the position of sales manager. He brings his experience in food sales to

DMS to assist in the company’s continuing sales growth and is the first addition to its sales team.

“I am really energized to join such an entrepreneurial company like DMS” said Bradford, “I will be able to be more self-directed and creative than ever before in my previous sales efforts!”

“We needed to add a true sales pro to our management team and we believe that Mark answers that need,” said Jeff Landsman, VP-sales and co-owner of DMS Food Imports. “As a growing company our goal is to add valuable team members as well as people who represent our core values of quality, value and integrity! Mark fulfills those attributes and we hope he is the first of many in our sales team!”

VIRGINIA COUNTY SHARE OF MARKET: 2024

Continued from page 114



YORK COUNTY Including POQUOSON (\$203.9 million) (Includes Yorktown)

• Population	70,952	• Female	50.2%
• # of Households	25,878	• White	67.9%
• Median Income	\$105,154	• Black	14.7%
• Under age 18	22.8%	• Hispanic	7.7%
• Over age 65	18.0%	• Asian	6.5%

1	Food Lion	4	\$51.10	25.06%
2	Walmart (superCenter)	1	\$46.50	22.81%
3	Kroger	2	\$44.90	22.02%
4	Wawa	2	\$17.48	8.57%
5	7-Eleven	6	\$17.40	8.53%
6	Walgreens	2	\$12.80	6.28%
7	CVS	1	\$4.70	2.31%
8	Rite Aid	1	\$4.50	2.21%
9	Royal Farm Stores	1	\$3.30	1.62%
		20	\$202.68	99.40%

() 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 2024

GRANDMA'STM

*“It’s so good,
it’s registered!”*



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