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INSIDE THIS ISSUE

TAKING STOCK

by Jeff Metzger

Gridlock Persists, Discounters Nibble At Supermarkets Stuck In The Mushy Middle

A year ago, I predicted "more of the same." More overstoring, more consumer economic worries and more progress for those retailers who were perceived to be price/value disrupters.

Actually, it wasn't a very difficult prediction. Except for the COVID era, these market realities have existed for the past decade, But the longer that Mid-Atlantic gridlock persists, the more challenging it's going to be for the retailers that can't separate themselves from the rest of the pack. And at some point in the near term, some merchants will look to

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Aldi, Costco, Wawa Among Few Gainers in $63B Mid-Atlantic Region

Walmart Passes Giant For Lead In Competitive, Overstored Mkt.

There is a new leader in town for the first time in 47 years. Walmart has overtaken Giant Food as the largest retailer in the $63 billion 89-county Mid-Atlantic market covered by *Food World*. While Walmart's gains came solely from its strong comparable store sales increases throughout the region which runs from Central PA to the Tidewater region of Virginia, Giant still maintained share of market dominance in the Baltimore-Washington area, the region's largest market.

The market study 12-month measuring period runs from April 1, 2024, to March 31, 2025.

As for the overall "year in food retailing," merchants again reported that consumer spending was tight and that overstoring and differentiated competition made significant gains difficult. Inflation was up slightly from last year, but nowhere near the levels that retailers experience during COVID and the post-pandemic inflationary cycle.

Of the more than 30 retailers we interviewed to discuss market conditions, a large majority expressed great concern about the future, citing tariffs, reductions in SNAP benefits, and a potential economic recession.

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

While Walmart once again didn't open any new stores (in fact it closed a conventional discount unit in Towson, MD), the company's strong price image fueled significant comp store sales increases and helped the country's largest retailer ($276 billion in annual grocery sales in the U.S.) jump into the leadership position for the first time since *Food World* first published its Mid-Atlantic market study in 1979. Now operating 157 stores, including 94 SuperCenters, the "Bentonville Behemoth" posted estimated extrapolated sales of $6.56 billion for the 12-month period ended March 31, 2025.

Sales-wise it was a flat year for Giant Food. The perennial Balt-Wash market leader opened two new stores (Parkville, MD and a replacement store in Bowie, MD)

See **MARKET STUDY** on page 65

WEIS MARKETS PREVIEWED ITS NEWEST STORE JUNE 18 IN LAKE Linganore, MD, the company's seventh unit in Frederick County. Welcoming community and team members to celebrate the ribbon cutting were Weis Markets' Bob Gleeson, Michael Lockhard, David Gose, CEO Jonathan Weis and store manager Derek Valencia.

CVS, Walgreens, Albertsons Acquire Prescription Lists

The Party's Over For Rite Aid As PA Drug Chain Starts Liquidation

What started with a single Thrift D drug store in Scranton, PA in 1962 owned by a young lawyer and businessman, Alex Grass, is facing extinction in the next few months.

Last month, the Pennsylvania-based retailer, which has headquarters in Philadelphia and Camp Hill, filed for bankruptcy, the second time in 19 months.

This time there'll be no restructuring, or an attempt to survive another round of deep cuts. In fact, the once mighty drug chain

See **RITE AID** on page 115

Food World, Food Trade News To Expand Coverage Into Florida

Effective July 1, Best-Met Publishing Co., publishers of *Food World, Food Trade News* and *foodtradenews.com*, will expand its market coverage area to include the state of Florida, the first major geographic expansion the company has undertaken since 2003.

"We will always be regional in nature – our strength for the past 47 years has been in providing insightful local coverage to the markets we reach," said Jeff Metzger, president and executive publisher, who along with his late partner Dick Bestany started Best-Met in 1978. "However, the industry remains very dynamic and many of the companies we already cover have a presence in the state of Florida."

Metzger pointed to existing headquarters circulation at Publix and Walmart, the two largest food retailers in the Sunshine State. Other retailers that already receive Food World or Food Trade News and operate in Florida include Whole Foods, Aldi and Target.

"Additionally, due to our strong relationship with the leadership team at Southeastern Grocers, we have increased our circulation at the company's Jacksonville headquarters," Metzger noted. "Another expansion incentive was the link to the market of many Metro New York Hispanic retailers who have family members operating stores in Florida. We have added several hundred independent Florida stores including those that are affiliated with Krasdale and Key Food."

Editorially, co-publisher Kevin Gallagher, who resides in Florida, will be spearheading the coverage along with Terri Maloney, also co-publisher.

Terri's Take

By Terri Maloney

Welcome to *Food World's* 2025 Market Study issue! Phew! Another year passes by and another market study hits the newsstands, so to speak. Happy reading.

Congratulations to the entire team at Weis Markets on their beautiful new Lake Linganore, MD store, which officially opened on June 19. Jeff and I drove out the day before to attend the preview and ribbon cutting ceremony and had a chance to walk through the 56,000 square foot supermarket, and it is a beauty! The company's seventh store in Frederick County is the first of five new units it will open in the next year and is the retailer's first new build store since 2020. It features a fresh, modern design, a full-service pharmacy, expanded grocery and produce sections, and a Weis Gas N' Go fuel center. Also located inside the store is a Starbucks unit, the second one in the Weis fleet. Chairman, president and CEO **Jonathan Weis** spoke to the many Weis associates in attendance and thanked them for their hard work and dedication. COO **Bob Gleeson** thanked Mother Nature for the glorious weather that day, which was the first sunny day in about a week, and touted the many features of the new store. Several other company execs also spoke and then the manager of the new store, **Derek Valencia**, made remarks before handing out several donations to local organizations in the community, which is near New Market and Ijamsville.

On a personal note, I grew up not too far from the area and it was a real eye opener to see the growth there. As a kid, I spent many summer days at my dad's cousin's farm in Ijamsville picking corn. Then, we'd take a truckload of the newly picked crop down to our old neighborhood in Bethesda and sell it to the folks there - a baker's dozen for 25 cents - and the truck would be empty within a couple of hours whenever we made the trip down county.

Anyway, congratulations to Weis Markets. I encourage you to check out the new location if you're in the area. Next up in a few days will be the new Rockville, MD Wegmans debut. More on that next month. It's good to see some new store activity.

Congrats are also in order for Harris Teeter's **Joey Bates**, who was recently inducted into the National Frozen and Refrigerated Foods Association's Hall of Fame. The Refrigerated Food Hall of Fame was established in 2010 to recognize individuals whose passion and leadership have advanced the industry. Inductees are honored for their lasting contributions to the category and to supporting NFRA's mission.

Bates is the retailer's senior director of store development and strategy - construction, maintenance, and market refresh. He has more than 30 years of experience in the grocery industry, holding leadership roles in store operations, merchandising and brand development. Since joining Harris Teeter in 2001, he has overseen categories throughout the store and served as dairy category manager and director of private brands.

In making the announcement, NFRA said: "A longtime advocate for the refrigerated category, Bates played a key role in introducing innovative products and bringing emerging brands to Harris Teeter's shelves." He served on the NFRA board for 2013 to 2023, chaired the Refrigerated Food Council from 2021 to 2023, served on the new member committee, presented to the Small Business Council, and helped launch the NFRA Convention's Speed Meeting. He is also a member of the Honorable Order of Golden Penguins. Nice work, Joey!

The induction ceremony will take place during the 2025 NFRA convention in October at the World Center Marriott in Orlando. For more information about the show, go to nfraconvention.org.

Also being recognized for excellence is Pompeian's Sunrise Olive Ranch olive oil, which has earned top honors at three of the world's most prestigious olive oil competitions.

At the heart of the accolades for the Baltimore-based brand is Sunrise Olive Ranch, located in California's Cuyama Valley. The ranch was the first olive farm in North America to earn the Sustainably Grown Certification from SCS Global Services, a global leader in third-party sustainability certification, validation and verification. Pompeian has committed to certify 100 percent of its farms by 2030. So far, 30 percent of its farms have achieved that goal.

Pompeian was awarded the Zurich International Olive Oil Award for sustainability and innovation, the only American olive oil brand to receive the honor. In addition, Pompeian received three Gold Medals at the 2025 NYIOOC World Olive Oil competition and multiple honors at the 2025 Los Angeles International Extra Virgin Olive Oil competition.

"Our dream is to transform the olive oil industry through sustainability and high quality olive oil," said **Paula Lopes**, Pompeian's VP of quality, R&D and Sustainability. "These awards honor the growers and innovators to make better olive oil for people and the planet."

It's good to see a local company get international attention for a good reason.

Alright, readers, enjoy this market study. I'm off to put the finishing touches on the *Food Trade News* version. Have a great July 4th weekend!

Food World

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TAKING STOCK

from page 1

close more stores, reduce jobs, or withdraw from the market altogether.

Based on the factors listed in the first paragraph of this story, it wasn't a great year for any retailer. But it was a good one for several, including Walmart, Costco, Trader Joe's, and Aldi. Of that group, only Aldi opened new stores in the Mid-Atlantic region over the past 12 months (see gridlock). The gains made by those merchants were primarily achieved by cementing the price/value connection with their customers.

Of course, diversification, fierce competition, and overstoring aren't the only reasons that retailers have slowed expansion in recent years. Real estate continues to be both scarce and expensive. And the average cost to build a 60,000 square foot supermarket today runs somewhere north of $30 million – it's no wonder that most retailers are prioritizing remodeling their stores rather than gambling on building new units.

Looking forward to next year, I believe conditions will be even tighter. Fear of recession is greater than 12 months ago. And with the direction of tariffs unclear, retailers don't view higher prices (whatever they may be) as a good thing. SNAP benefits could take a hit in the next year, too, and then there's this remaining gridlock/overstoring situation to contend with.

As for this past year, for the 47th time, here's my annual analysis of the market leaders in *Food World's* largest trading area, the Baltimore-Washington market. And here's one emerging factor to consider: with the recent federal layoffs (and threat of more government job cuts), the once thought-to-be "recession proof" economy of the region is now being tested for the first time since World War II.

Giant Food – Another flat year for the perennial market leader.

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2025 FOOD WORLD MARKET STUDY INDEX

The Mid-Atlantic Market

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

Several retailers included in this study also operate stores outside of this area. Data on those stores outside of our 89-county geography are not part of this study. Our measuring period covers from 4/1/24 to 3/31/25.

Although food price inflation creeped up a bit in the last six months of our measuring period, it was nowhere near as robust as it was during the peak of COVID (2020-2022) and continued high inflation in 2023. And with diminishing confidence about the economy, partly fueled by the uncertainty of tariffs, inflation could very well be a significant factor for the remainder of 2025.

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

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

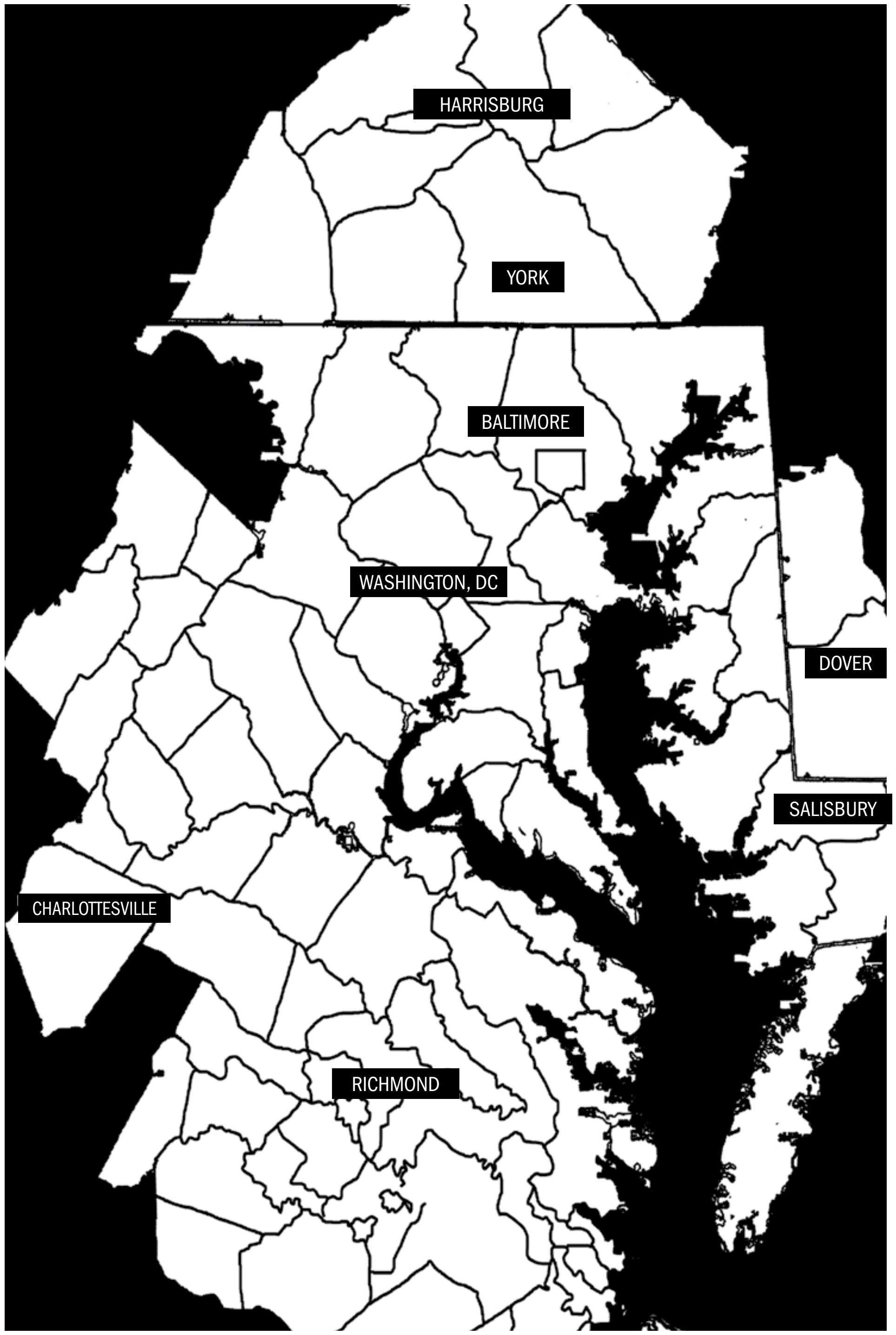
Leakage, or "county-hopping," can result from a sparsity of stores in one county causing consumers to shop in a bordering county where food retailing opportunities are more available, creating a build-up of food sales in those areas. High volume retailers such as Walmart, Costco and Wegmans, which operate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

Beach havens such as Sussex County, DE (Rehoboth Beach), Worcester County, MD (Ocean City), Accomack County, VA (Chincoteague) and Virginia Beach, VA draw much of their summer volume from visitors who don't reside in those resort areas, causing leakage.

Other more rural counties where retail sales surpassed 100 percent of the per capita county sales totals included Isle of Wight, 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: 2025

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 $62.99 billion**.

Rank	Company	Stores	2025 Sales (in millions)	2025 % of Area Market
1	Walmart (SuperCenter/Neighborhood Mkt)	157	$6,561.20	10.42%
2	Giant Food	159	$6,504.10	10.33%
3	CVS	593	$3,768.50	5.98%
4	Food Lion	256	$3,552.10	5.64%
5	Albertsons (Acme/Balducci's/Safeway)	123	$3,503.40	5.56%
6	The Giant Co. (Martin's)	63	$3,111.60	4.94%
7	7-Eleven	1,141	$2,959.70	4.70%
8	Harris Teeter	78	$2,558.90	4.06%
9	Wegmans	26	$2,426.20	3.85%
10	International Markets	141	$2,265.60	3.60%
11	Target (Super Target)	112	$2,202.70	3.50%
12	Costco	30	$2,154.30	3.42%
13	Weis Markets	99	$2,104.06	3.34%
14	Walgreens	300	$1,867.80	2.97%
15	Amazon Grocery (Amazon Fresh/Whole Foods)	45	$1,612.50	2.56%
16	Wawa	210	$1,583.09	2.51%
17	Aldi	153	$1,436.20	2.28%
18	Kroger (Marketplace)	37	$1,404.30	2.23%
19	BJ's Wholesale Club	30	$1,224.60	1.94%
20	Sam's Club	26	$1,165.80	1.85%
21	Trader Joe's	33	$904.70	1.44%
22	Royal Farm Stores	266	$852.70	1.35%
23	Sheetz	167	$720.20	1.14%
24	Shoppers	22	$592.30	0.94%
25	Military Commissaries	20	$592.22	0.94%
26	Lidl	61	$552.40	0.88%
27	ShopRite (Klein's/Village/Price Rite)	13	$419.70	0.67%
28	Rite Aid	112	$406.00	0.64%
29	Publix	23	$390.40	0.62%
30	Redner's Markets	14	$322.30	0.51%
31	MOM's Organic Market	17	$280.10	0.44%
32	The Fresh Market	17	$234.60	0.37%
33	Sprouts	11	$205.30	0.33%
34	Turkey Hill	114	$192.10	0.30%
35	Save A Lot	30	$183.00	0.29%
36	Fas-Marts	88	$170.60	0.27%
37	Rutter's Farm Stores	72	$166.30	0.26%
38	Grocery Outlet	21	$133.80	0.21%
39	C&S Independents	67	$109.40	0.17%
40	Dash-In	48	$108.00	0.17%
41	High's	52	$97.90	0.16%
42	IGA	6	$58.76	0.09%
43	Miller Marts	26	$53.80	0.09%
44	Giant Eagle (Get Go)	4	$42.80	0.07%
45	Great Valu	5	$40.60	0.06%
46	Circle K	13	$31.00	0.05%
47	ASG	7	$23.50	0.04%
48	America's Food Basket	1	$7.80	0.01%
48	Key Food	1	$6.02	0.01%
	GRAND TOTAL	**5,110**	**$61,864.95**	**98.22%**

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

Source*: Food World,* June 2025

SUPERMARKETS

Ahold Delhaize USA

1385 Hancock St.
Quincy, MA 02169
Phone: (800) 767-7772
Web: aholddelhaize.com
Ahold Delhaize CEO: Frans Muller
Ahold Delhaize USA CEO: JJ Fleeman
Chief Comm./Digital Officer: Keith Nicks
Chief Supply Chain Officer: Sanja Krajnovic

Albertsons Companies

Mid-Atlantic Division
75 Valley Stream Pkwy.
Malvern, PA 19355
Phone: (610) 889-4000
Web: acmemarkets.com, safeway.com, kingsfoodmarkets.com, balduccis. com
Pres.: Tom Lofland
SVP-Ops.: Brad Spooner
SVP-Merch./Marketing: Jay Habben
VPs-Ops.: Mike Styer, Jonathan Cruz
VP-Sales Support: Jonathon Simmons
VP-HR: Kimberly Hilser
DMs: Amy Remillard, Chris Sanchez, Brendan Murphy, Kevin Reger, Kristan Lewis, Matt Juhring, Tiffany Knottingham, Theresa Farello, Phil White, James Stone, Ed Tippett, John Brooks, Lori Valenzuela, Frank Cardoso
Dir. Merch./Marketing: Sherry Caldwell
Dirs.-Merch.: Patrick Hildebrand, Arthur Goncalves
Dir.-Center Sstore: Jenifer Krause
Sales Mgr.-Own Brands: Anne Marie Mozzone
Sales Mgr.-Groc.: Kenneth Thompson
Sales Mgrs.-Liquor: Tim Ley, John Coleman
Sales Mgrs.-Produce: Ricardo Dimarzio, Joe Lerario
Sales Mgrs.-Meat: John Toomey, Richard Michener
Sales Mgrs.-Bakery: Christine Hixon, Michele Tuscano
Sales Mgrs.-Deli: Angie Marshall, Matthew Nangle
Sales Mgrs.-Floral: Katie Vasquez, Michelle Edwards
Dir.-Catering: Jennifer Rupert
Sr. Dir.-Finance: Randy Weist
Dir.-Public Affairs: Dana Ward
Dirs.-Loss Prevention: Joe Conway, Bob Rosato
Dir.-Customer Service: Marianne Nice-Trionfo
Dirs.-Pharmacy: Amir Masood, Janis Levit
Dir-HR: Sloan Nichols
Dir-Labor Rel.: Joan Williams
Dir.-Food Safety: James Walden
Dirs.-Ecommerce: Alicia Bell, Betsy Gavigan
Corporate offices:
250 Parkcenter Blvd.
Boise, ID 83706
Phone: (208) 395-6200
Pres./CEO: Susan Morris
Web: Albertsons.com
Primary Supplier: Direct
FW Stores: 123 (Includes Acme Markets, Balducci's, Safeway)
FW Vol.: $3.50 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: 153
FW Vol.: $1.44 billion

Amazon Grocery

Northeast Div.
Harborside 3
210 Hudson St., Ste 700I.
Jersey City, NJ 07311
Phone: (201) 567-2090
VP-Amazon Worldwide Grocery Stores: Jason Buechel
SVP-Northeast Ops.-WFM: Nicole Davia

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FOOD WORLD MARKET STUDY 2025: RULES & ANALYSIS

The story is becoming predictable – too many stores that are differentiated (in size and style), fighting for the same dollar which in recent years has seemed like a competitive death match.

This year, inflation edged up a bit (compared to last year), but offered little relief to food retailers, particularly supermarkets. That's because the overall economy remains listless, and in recent months, the threat of a recession has consumers concerned and sometimes frightened.

Yes, there were a handful of retailers which did very well in this year's market study – Walmart, Costco, Aldi Trader Joe's and Wawa. All shared today's formula for success: price/value, convenience, and clear operating and/or merchandising separation from their competitors.

The truth of the matter is that most of the Mid-Atlantic has been overstored for two decades. And competition has always been formidable. But what's different now is that underperforming stores aren't closing as quickly as in the past, and virtually all of the existing players have deep enough pockets to stay in the game despite continued lack of success. To wit, 15 years ago, the following chain store banners operated in the Mid-Atlantic - A&P/Super Fresh, Bloom and Bottom Dollar (owned by Food Lion), Farm Fresh, and Kmart. Independent retailers such as Mars, Magruder's, Farmers Foods, Stop Shop & Save, Food King, and McKay's also operated stores in the region. They're all toast now – some sold, but most closed because of performance or family succession issues.

Today there are disappointments, too, but hardly any resulting white flags. In fact, Rite Aid (and maybe Shoppers) will be the only large retailers in the next year to perish (and Rite Aid has been on life support since former CEO Martin Grass donned prison stripes 21 years ago).

And while most of these retailers likely won't be packing it in anytime soon, you've got to wonder about the future direction of merchants such as Amazon Fresh (slightly improved, but still subpar); Grocery Outlet (a questionable operating model for the Mid-Atlantic with even more questionable franchise owners); Save A Lot (a C-suite that resembles an F-suite); Shoppers (who's running the ship and will there ever be significant cap-ex money to even bring the stores up to sea level?); and Target (a once great merchant that now seems directionless and has lost its mojo). And then there are the three (soon-to-be two) drug chains. Even after Rite Aid is in the process of exiting, both Walgreens and CVS continue to close stores because they both know one inherent, unspoken truth – they're lousy retailers. Both will survive, largely because they will feed on Rite Aid's rotting carcass and because they sell a lot of GLP-1 prescriptions.

Looking ahead, retailers see little room for optimism. That might be because the threat of increased tariffs (and continued political flip-flopping about them) and cuts to food assistance programs will mean higher prices and fewer potential dollars to be spent on groceries.

When the dust settles, will the average tariff rate be 10 percent or 25 percent? Will those Washington politicos who want to slash SNAP funding by $230 billion (that a "B') over the next decade get their way?

Whatever the outcomes, neither will help retailers sell more stuff.

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

The dominance of the perennial market leaders – Giant Food and Safeway – remains unthreatened, but upon closer analysis, recent share gains in the $37 billion market have been primarily made by non-supermarket retailers where there's more focus on price. In the past year, Walmart gained market share even though it didn't open any new stores, and other alternate channel merchants such as Aldi, Trader Joe's and Costco continued to take small bites from the supermarket channel which also includes Harris Teeter (flat sales) and Shoppers Food (continued declining volume). The one exception remains Wegmans which enjoyed a solid year of same-store sales growth. The past 12 months also marked the return of Amazon Fresh openings with three new stores. The revised format is an improvement, but the overall shopping experience is still lacking. Expect more chipping away at the current leaderboard by non-traditional merchants like Aldi, Lidl, Sprouts and Trader Joe's, which all have multiple new stores planned in the next two years, while neither Giant nor Safeway is scheduled to open any new B-W stores.

Eastern Shore

Another market where strong same-store sales by leader Walmart helped extend the "Behemoth's" share, despite no new store openings on the $3.2 billion Delmarva Peninsula. Along with Food Lion, which operates more than twice as many stores as Walmart (33 vs. 14), the two market leaders combined to grab nearly one-third of all food and drug business in the 12-county, three state area. Other than c-stores - Wawa and Royal Farms both added new stores - the Eastern Shore remained an area with little shift in overall market share and where convenience stores (also including 7-Eleven and Fas-Marts) and drug chains grabbed a larger share than in other Mid-Atlantic areas. Of the larger-sized boxes (supermarkets, clubs, mass merchants), only Giant Food has plans to add new stores. The Landover, MD-based regional chain is building a new 66,000 square foot supermarket in Berlin, MD which should open later this year.

Central Pennsylvania

There is no market in the entire Mid-Atlantic region where one retailer dominates to the level of The Giant Company (TGC) in CPA. The Carlisle, PA-based brand of Ahold Delhaize USA continued to garner more than one-third of the $7.4 billion food and drug business in Central PA's eight counties with its 52 supermarkets, the same total as last year. From a growth perspective, second-place Weis Market had a better year. Same-store sales were solid and the Sunbury, PA-based operator opened three new stores via acquisition – two Sunnyway Foods units in Chambersburg, PA and Greencastle, PA, and Saylor's Market in Newville, PA. Other retailers that grew revenue above the industry norm during the past 12 months were Aldi (one new store and strong same-store sales) and Walmart (excellent same-store volume at its 20 units, most of them SuperCenters). On a more negative note, the biggest decliner in the market was Rite Aid, which closed three stores and saw sales fall by nearly 10 percent. Next year, there won't be any Rite Aid units as the Camp Hill, PA-based drug chain is liquidating operations and attempting to sell all of its drug stores.

Richmond

Continued gridlock best describes the $4.8 billion Richmond market, where three retailers – leader Walmart, Kroger, and Food Lion – control 46.3 percent of the area's business. That leaves little room for significant growth for other merchants that compete with the "big three." Of the trio, Walmart had the best year, strictly on its excellent same-store sales performance at its 17 stores, most of them SuperCenters. However, there was a bit of positive movement at the next level where Wawa added four convenience stores and increased its share to 6.5 percent of the market. Less than a decade ago, Richmond was one of the most changeable markets in the country with the entries of Publix and Wegmans and the departure of Martin's. However, much like other adjacent markets, overstoring and fierce competition have created almost no change in the past three years. And other than a new Kroger Marketplace, which will replace an existing store in Mechanicsville next year, no new large projects in the $4.8 billion market are scheduled.

Tidewater

Did I mention gridlock? The Hampton Roads area is another market where new store

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from page 12

FW Stores: 45 (includes Whole Foods/Amazon Fresh)
FW Vol: $1.61 billion

America's Food Basket

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

Associated Supermarket Group

99 Seaview Blvd., Ste. 360
Port Washington, NY 11050
Phone: (516) 256-3100
Web: asghq.com
Co-CEO/Co-Pres.: Joe Garcia
Co-CEO/Co-Pres:
Zulema Wiscovitch
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
Regional Stores: 7
Regional 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: 7 (Includes Food Depot/Green Valley Market)
FW Vol.: $146.4 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.: $10.4 million

C&S Independents

336 East Penn Ave.
Robesonia, PA 19551
Phone: (610) 693-3161
Web: cswg.com
FW Stores: 67
FW Vol.: $109.4 million
**C&S Independents are comprised of the independent supermarkets serviced by C&S from its Robesonia, PA headquarters.*

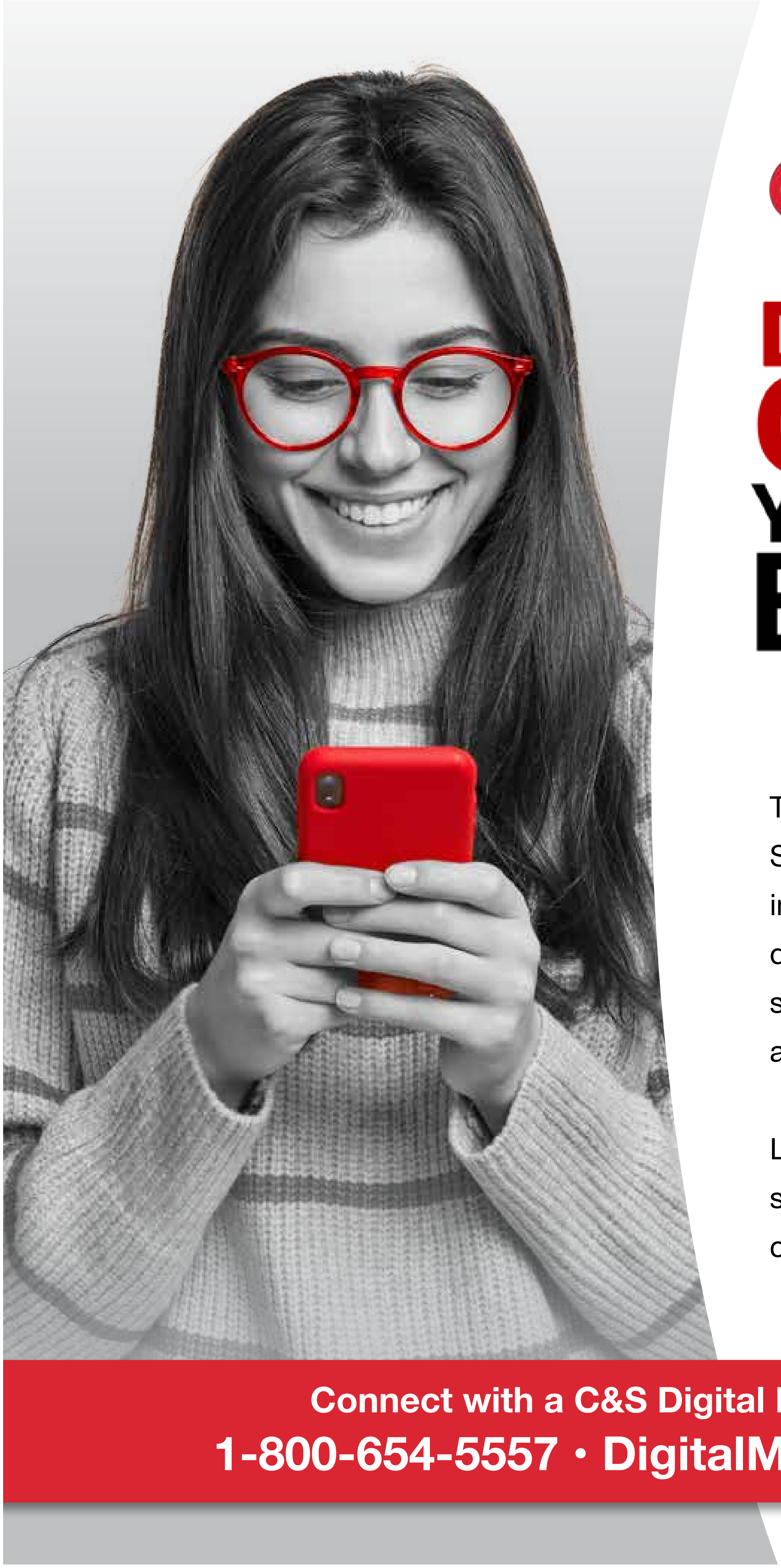
Eddie's of Roland Park

5125 Roland Ave.
Baltimore, MD 21210
Phone: (410) 323-3656
Web: eddiesofrolandpark.com
Co-owners: Nancy Cohen, Michael Schaffer, Andrew Schaffer
Primary Supplier: Bozzuto's
FW Stores: 2
FW Vol.: $38.7 million

Family Owned Markets

951 Roherstown Rd., Unit 201
Lancaster, PA 17601
Phone: (717) 874-5152

See **DIRECTORY** on page 63



TAKING STOCK

from page 6

As stated in my recap above, Giant falls in the category of attempting to find enough of a differentiated niche to draw new shoppers and reduce the cross-shopping of those consumers who used to spend more with the Landover, MD-based merchant. While others nibble away at Giant's dominant share, nobody can ever match the company's great B-W locations. From a strategic perspective, the retailer is making a lot of the right decisions. To wit, Giant's new replacement supermarket in Bowie, MD. The old store was a productive old workhouse; the new store is dynamic and already has added significant comp store sales in a market that Giant has had success for decades. The challenge is to find more opportunities like Bowie before a lot more "nibbling" occurs.

Safeway – Perhaps now that the Kroger-Albertsons merger soap opera has ended (except for the ensuing FU litigation), perhaps Albertsons can re-focus (and re-spend) on its stores. New CEO Susan Morris is certainly better connected to the culture and much more store knowledgeable than c-suite "all-star" Vivek Sankaran was. But will Albertsons/Safeway actually spend the money needed to improve store conditions and lower everyday pricing? Much like Giant, Safeway, despite its strong market share and excellent locations, is stuck in that mushy middle, which makes them vulnerable to the likes of Walmart, Aldi and Lidl. I consider Mid-Atlantic president Tom Lofland extremely savvy and very aware of the realities of the markets in which he oversees. Much like his predecessor Jim Perkins, the question remains as to whether the Albertsons corporate leadership team, its board of directors, and its greedy institutional shareholders will give him the resources to compete more effectively.

Walmart – Two months ago, Walmart CEO Doug McMillan simplified his belief that, during difficult economic times, consumer will look to Walmart for lower prices. At the company's annual community meeting in Dallas, he said: "Price leadership drives our business." And so it goes. Another year of no new store openings, but in "gridlock city" that hardly mattered. Strong comp sales anchored by low prices and a continued focus on improving store conditions (cleaner units with fewer out-of-stocks) helped Walmart sell more stuff than it did a year ago. At some point in the next few years, its stores in the B-W market will receive the cap-ex needed to remodel older units as well to build new locations, most likely SuperCenters (if it can find the real estate), now that the company has re-committed to improving its brick-and-mortar foundation. There could be a few bumps along the road (tariffs, SNAP cuts), but nobody on the entire planet is better positioned than the "Behemoth."

Harris Teeter – Meh. Add another resident to the mushy middle. When it entered Washington in 1999, the upscale division of Kroger came with a mission: replicate the service and consumer image that Giant had under the halcyon years of former CEO Izzy Cohen. And for many years it succeeded – the stores were beautiful, the staff was well trained, and HT spent plenty of money developing expensive new stores in urban and suburban locations. But something happened during and after COVID. The expansion effort slowed, the stores are getting older, and the market-wide labor shortage/retention bugaboo has impacted HT's store mojo. Perhaps the Kroger-Albertson failed romance will allow the company to re-focus and increase its spending. If not, expect more mushiness.

TAKING STOCK continues on page 39

A.J. Letizio Acquires Hughes Sales, JP Food Sales, Madden Global Solutions

A.J. Letizio Sales & Marketing Inc., the Windham, NH-based food brokerage/sales agency, announced the coordinated merger of three regional sales agencies - Hughes Sales, Inc, Columbia MD; Madden Global Solutions, Inc., Quincy, MA; and JP Food Sales, Dresher PA - with A.J. Letizio. The deal becomes effective on June 1.

The merger will result in the creation of a 165-person, Eastern U.S. retail sales agency with strength in the meat, deli, seafood, in-store bakery, produce and center store grocery categories.

In the arrangement, A.J. Letizio has acquired the businesses of Hughes Sales, Madden Global Solutions, and JP Food Sales, all effective on June 1, 2025, employing all their staff members as part of the newly combined team, providing service to the retail food industry across 20 states.

As part of the move, A.J. Letizio has appointed Geoff Mason of Hughes Sales, to the position of category director of produce, leading the major new A.J. Letizio sector. Additionally, Bill Sando of Hughes has been named category director of meat; JP Food Sales' Kevin O'Donnell will serve as category director of deli; and Madden's Brian Riccio was named VP and category director of seafood. Those newly appointed category directors join A.J. Letizio's VP-category director of bakery Mike Myers, and grocery-center store VP/director Mark Langelier in rounding out the retail division category leadership team.

Additionally, A.J. Letizio has taken over the Hughes Sales' headquarters in Columbia. In the Delaware Valley, J.P Food Sales' team will relocate operations to A.J. Letizio's Philadelphia regional headquarters. A.J. Letizio has additionally announced plans to begin construction of two new, state-of the art A.J. Letizio Enterprise Centers - one in Columbia, MD and the other in King of Prussia, PA - to be the company's newest regional support and training centers, serving its retail and foodservice businesses in each region.

The Hughes organization has grown substantially over the past 28 years, driven by founders Michael and Linda Hughes, who have assembled a team of industry professionals who serve their clients and customers in meat, deli, produce, and seafood.

Jack and Phyllis O'Donnell founded JP Food Sales in 1981. Under Jack O'Donnell's leadership, the JP Sales team grew exponentially by offering expert personal service to their customers and clients. With a focus on produce, deli and cheese, JP Sales has developed strong industry relationships that have helped the company expand since its inception.

"Bringing A.J. Letizio together with these three top notch organizations adds significant benefits to our clients and customers in the eastern United States. The mergers are a key step in the A.J. Letizio 20-year strategic plan." said Al Letizio Jr., chief executive officer.

The Letizio family traces its five-generation origins in the food business to the family's Italian market in Lawrence, MA in 1912. A.J. Letizio Sales & Marketing is a privately owned independent sales agency that is celebrating its 37th year in operation in 2025.

The company provides service to all channels of the food industry throughout the eastern United States. In addition to its headquarters in Windham, it operates regional support facilities in New York City and Rochester, NY; Philadelphia, PA; Glastonbury, CT; as well as its new Columbia, MD facility.

Washington Supermarket Leaders

- Giant Still Commands, Sales Flat
- Albertsons Share Dips To 15.9%
- International Mkts. Add 2 Stores
- Amazon Opens AF Units
- Aldi Posts Strong Comp Sales

Rank	Company	2025 Stores	2025 Sales (in millions)	% of 2025 Market	2024 Stores	2024 Sales (in millions)	% of 2024 Market
1	Giant Food	112	$4,341.50	28.62%	113	$4,252.20	28.92%
2	Albertsons (Balducci's/Safeway)	83	$2,415.40	15.92%	87	$2,361.70	16.06%
3	International Markets	109	$1,826.10	12.04%	107	$1,743.70	11.86%
4	Harris Teeter	43	$1,555.70	10.25%	43	$1,519.10	10.33%
5	Wegmans	15	$1,522.70	10.04%	15	$1,484.20	10.10%
6	Amazon Groc. (AF/Whole Foods)	33	$1,204.60	7.94%	32	$1,130.70	7.69%
7	Trader Joe's	22	$666.00	4.39%	21	$613.80	4.18%
8	Aldi	57	$590.80	3.89%	55	$540.40	3.68%
9	Food Lion	32	$466.10	3.07%	32	$456.70	3.11%
10	Shoppers	15	$411.00	2.71%	15	$409.40	2.78%
		521	**$14,999.90**	**98.87%**	**520**	**$14,511.90**	**98.71%**

This chart lists the top 10 supermarket retailers in the Washington market. Counties/cities included are: Washington, DC; Calvert, Charles, Frederick, Montgomery and Prince George's in MD; Arlington, Clarke, Culpeper, Fairfax, Fauquier, King George, Loudoun, Prince William, Spotsylvania, Stafford and Warren and the independent cities of Alexandria, Fairfax, Falls Church and Fredericksburg in VA. Petroleum sales are not included. ( ) Indicates another banner used by the company. **Total supermarket sales for the area are $15.17 billion.**

Source: Food World, June 2025

Washington Market Leaders

- Alt. Channels Share Up To 33.5%
- Giant Food Still The King
- Drug Chains Share Dips To 8.8%
- Strong Comps Aid Walmart
- TJ's Has Another Stellar Year

Rank	Company	2025 Stores	2025 Sales (in millions)	% of 2025 Market	2024 Stores	2024 Sales (in millions)	% of 2024 Market
1	Giant Food	112	$4,341.50	16.83%	113	$4,252.20	17.01%
2	Albertsons (Balducci's/Safeway)	86	$2,415.40	9.37%	87	$2,361.70	9.45%
3	International Markets	109	$1,826.10	7.08%	107	$1,743.70	6.97%
4	CVS	244	$1,644.20	6.38%	246	$1,579.30	6.32%
5	Harris Teeter	43	$1,555.70	6.03%	43	$1,519.10	6.08%
6	Wegmans	15	$1,522.70	5.90%	15	$1,484.20	5.94%
7	Walmart (SuperCenter)	39	$1,490.20	5.78%	39	$1,435.80	5.74%
8	Costco	17	$1,401.60	5.43%	17	$1,345.80	5.38%
9	7-Eleven	517	$1,359.70	5.27%	520	$1,313.10	5.25%
10	Amazon Groc. (AF/Whole Foods)	33	$1,204.60	4.67%	32	$1,130.70	4.52%
11	Target (Super Target)	48	$1,068.50	4.14%	48	$1,049.90	4.20%
12	Trader Joe's	22	$666.00	2.58%	21	$613.80	2.45%
13	Walgreens	93	$619.00	2.40%	97	$630.60	2.52%
14	Aldi	57	$590.80	2.29%	55	$540.40	2.16%
15	Food Lion	32	$466.10	1.81%	32	$456.70	1.83%
16	Shoppers	15	$411.00	1.59%	15	$409.40	1.64%
17	Weis Markets	24	$399.29	1.55%	24	$390.71	1.56%
18	BJ's Wholesale Club	9	$381.10	1.48%	9	$367.80	1.47%
19	Wawa	56	$365.55	1.42%	55	$364.66	1.46%
20	Lidl	32	$308.80	1.20%	32	$302.40	1.21%
		1,603	**$24,037.84**	**93.20%**	**1,607**	**$23,291.97**	**93.15%**

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 $25.70 billion.** Source: *Food World,* June 2025

Baltimore Supermarket Leaders

- Giant Widens Lead
- Safeway Sales Flat
- Wegmans Tops Per-Store Sales
- Aldi Again Grows Share
- AF Opens In Glen Burnie

Rank	Company	2025 Stores	2025 Sales (in millions)	% of 2025 Market	2024 Stores	2024 Sales (in millions)	% of 2024 Market
1	Giant Food	41	$1,863.60	34.06%	41	$1,820.30	34.11%
2	Albertsons (Acme/Safeway)	27	$809.50	14.80%	27	$800.90	15.01%
3	Weis Markets	25	$557.93	10.20%	25	$550.51	10.31%
4	Wegmans	5	$485.00	8.86%	5	$473.90	8.88%
5	ShopRite (Klein's/Village/PR)	10	$372.50	6.81%	10	$362.40	6.79%
6	International Markets	21	$314.70	5.75%	20	$290.70	5.45%
7	Harris Teeter	6	$253.90	4.64%	6	$247.30	4.63%
8	Aldi	30	$239.40	4.38%	29	$220.50	4.13%
9	Food Lion	20	$238.60	4.36%	20	$239.90	4.49%
10	Amazon Groc. (AF/WFM)	6	$209.40	3.83%	5	$196.20	3.68%
		191	**$5,344.53**	**97.68%**	**188**	**$5,202.61**	**97.48%**

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 $5.47 billion.

Source: *Food World*, June 2025

Baltimore Market Leaders

- Alts. Share Grows To 37.8%
- Giant Leads Against All Comers
- C-Stores Grow Share To 9.5%
- Store Closures Impact Drug Chains
- Costco Has Strong Year

Rank	Company	2025 Stores	2025 Sales (in millions)	% of 2025 Market	2024 Stores	2024 Sales (in millions)	% of 2024 Market
1	Giant Food	41	$1,863.60	16.56%	41	$1,820.30	16.50%
2	Walmart (SuperCenter)	21	$878.10	7.80%	22	$862.00	7.82%
3	Albertsons (Acme/Safeway)	27	$809.50	7.19%	27	$800.90	7.26%
4	Weis Markets	25	$557.93	4.96%	25	$550.51	4.99%
5	CVS	81	$491.70	4.37%	83	$474.30	4.30%
6	Wegmans	5	$485.00	4.31%	5	$473.90	4.30%
7	Walgreens	73	$436.50	3.88%	82	$492.70	4.47%
8	Royal Farm Stores	139	$432.00	3.84%	137	$402.40	3.65%
9	7-Eleven	163	$398.70	3.54%	163	$381.60	3.46%
10	Target	19	$382.90	3.40%	19	$379.20	3.44%
11	ShopRite (Klein's/Village/PR)	10	$372.50	3.31%	10	$362.40	3.29%
12	Costco	5	$346.20	3.08%	5	$331.70	3.01%
13	Sam's Club	6	$337.30	3.00%	6	$328.00	2.97%
14	International Markets	21	$314.70	2.80%	20	$290.70	2.64%
15	BJ's Wholesale Club	7	$303.80	2.70%	7	$294.60	2.67%
16	Harris Teeter	6	$253.90	2.26%	6	$247.30	2.24%
17	Wawa	32	$241.49	2.15%	32	$237.82	2.16%
18	Aldi	30	$239.40	2.13%	29	$220.50	2.00%
19	Food Lion	20	$238.60	2.12%	20	$239.90	2.18%
20	Amazon Groc. (AF/Whole Foods)	6	$209.40	1.86%	5	$196.20	1.78%
		737	**$9,593.22**	**85.26%**	**744**	**$9,386.93**	**85.11%**

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 $11.25 billion.** Source: *Food World,* June 2025

FOOD WORLD'S LEADING INDEPENDENTS: 2025

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

Rank	Company	2025 Supermarkets	2025 (in millions)	2024 Supermarkets	2024 (in millions)	Headquarters	Primary Supplier
1	Karns Prime & Fancy Foods	10	$186.00	10	$186.00	Mechanicsburg, PA	UNFI
2	B. Green (Food Depot/Green Valley)	7	$146.40	6	$143.90	Baltimore, MD	UNFI
3	Family Owned Markets	6	$103.47	7	$127.67	Millersville, PA	MDI
4	Streets Market	12	$104.00	11	$94.50	Washington, DC	Bozzuto's
5	Graul's	5	$58.10	6	$68.20	Baltimore, MD	UNFI
6	Sharp Shopper	4	$55.20	4	$54.40	Ephrata, PA	Direct
7	Eddie's of Roland Park	2	$38.70	2	$38.10	Baltimore, MD	Bozzuto's
8	Geresbeck's Food Market	3	$35.70	3	$35.40	Baltimore, MD	C&S
9	Roots Markets	2	$24.30	2	$24.10	Clarksville, MD	UNFI
10	Boyer's Markets	1	$10.40	1	$10.56	Orwigsburg, PA	UNFI
	GRAND TOTAL	**52**	**$766.77**	**52**	**$786.53**		

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

Source: *Food World,* June 2025

Kreider FARMS ®
90 YEARS
- EST. 1935 -
learn more about the Kreider family and our history here:
90 Years. One Family. One Farm.
It's National Dairy Month an we're celebrating 90 years of local, farm-fresh dairy —and the family values that make it possible. Thanks for being part of our story.

IN REVIEW: WALMART

State	County	2025 Stores	2025 Sales (in millions)	2025 County Food Sales	% of 2025 County Market	2024 Stores	2024 Sales (in millions)	% of 2024 County Market
DC	Washington (SuperCenter)	2	$54.30	$2,722.30	1.99%	2	$52.30	1.96%
DC Recap: 2 stores with sales of $54.3 million. Total retail food sales for DC in the study: $2.74 billion. Walmart share of DC is 1.99%.								
DE	Kent (SuperCenter)	2	$71.20	$574.80	12.39%	2	$69.50	12.37%
DE	Sussex (SuperCenter)	4	$151.20	$1,114.60	13.57%	4	$144.20	13.37%
DE Recap: 6 stores with sales of $222.4 million. Total retail food sales for DE in the study: $1.7 billion. Walmart share of DE is 13.16%.								
MD	Anne Arundel (SuperCenter)	4	$180.50	$2,542.10	7.10%	4	$171.50	6.94%
MD	Baltimore County (SuperCenter)	8	$383.40	$3,773.20	10.16%	9	$379.60	10.33%
MD	Calvert (SuperCenter)	2	$70.80	$449.80	15.74%	2	$67.80	15.60%
MD	Caroline (SuperCenter)	1	$45.80	$111.60	41.04%	1	$45.10	43.20%
MD	Carroll (SuperCenter)	4	$124.70	$759.30	16.42%	4	$128.20	17.14%
MD	Cecil (SuperCenter)	2	$66.20	$326.20	20.29%	2	$64.70	20.04%
MD	Charles (SuperCenter)	2	$84.10	$640.50	13.13%	2	$82.30	13.17%
MD	Dorchester (SuperCenter)	1	$31.10	$72.00	43.19%	1	$30.30	42.32%
MD	Frederick (SuperCenter)	2	$130.50	$1,071.80	12.18%	2	$124.70	11.99%
MD	Harford (SuperCenter)	3	$108.20	$1,152.60	9.39%	3	$102.40	9.09%
MD	Howard (SuperCenter)	2	$81.30	$1,336.50	6.08%	2	$80.30	6.25%
MD	Montgomery (SuperCenter)	1	$43.50	$4,189.10	1.04%	1	$42.80	1.07%
MD	Prince George's (SuperCenter)	4	$103.20	$3,666.90	2.81%	4	$95.10	2.65%
MD	St. Mary's (SuperCenter)	1	$66.10	$400.30	16.51%	1	$64.20	15.81%
MD	Talbot	1	$25.80	$236.60	10.90%	1	$25.30	10.30%
MD	Washington (SuperCenter)	2	$132.40	$607.50	21.79%	2	$126.80	21.88%
MD	Wicomico (SuperCenter)	2	$86.20	$327.80	26.30%	2	$84.50	26.62%
MD	Worcester (SuperCenter)	2	$89.40	$258.70	34.56%	2	$86.70	34.04%
MD Recap: 44 stores with sales of $1.85 billion. Total retail food sales for MD in the study: $23.76 billion. Walmart share of MD is 7.8%.								
PA	Adams (SuperCenter)	1	$25.80	$230.20	11.21%	1	$25.10	10.76%
PA	Cumberland (SuperCenter)	4	$137.50	$1,289.40	10.66%	4	$131.80	10.55%
PA	Dauphin (SuperCenter)	2	$92.10	$1,134.70	8.12%	2	$89.20	8.09%
PA	Franklin (SuperCenter)	2	$94.30	$535.70	17.60%	2	$91.70	19.56%
PA	Lancaster (SuperCenter)	3	$160.70	$1,849.30	8.69%	3	$152.60	8.43%
PA	Lebanon (SuperCenter)	2	$100.40	$475.10	21.13%	2	$96.40	20.90%
PA	York (SuperCenter)	6	$254.20	$1,782.60	14.26%	6	$241.70	14.01%
PA Recap: 20 stores with sales of $865.0 million. Total retail food sales for PA in the study: $7.43 billion. Walmart share of PA is 11.65%.								
VA	Accomack (SuperCenter)	1	$43.80	$107.30	40.82%	1	$42.20	40.38%
VA	Albemarle (SuperCenter)	1	$44.00	$744.90	5.91%	1	$42.80	5.98%
VA	Chesapeake City (SuperCenter)	6	$195.20	$997.70	19.56%	6	$186.20	18.93%
VA	Chesterfield (SuperCenter)	6	$273.60	$1,762.40	15.52%	6	$261.30	15.27%
VA	Culpeper (SuperCenter)	1	$37.70	$193.00	19.53%	1	$36.80	19.64%
VA	Dinwiddie (SuperCenter)	1	$50.30	$145.50	34.57%	1	$49.40	34.86%
VA	Essex (SuperCenter)	1	$48.10	$79.70	60.35%	1	$47.30	64.09%
VA	Fairfax (SuperCenter)	8	$285.20	$6,356.60	4.49%	8	$271.50	4.44%
VA	Fauquier (SuperCenter)	1	$41.90	$212.80	19.69%	1	$41.40	21.04%
VA	Frederick (SuperCenter)	3	$179.30	$561.70	31.92%	3	$170.60	30.36%
VA	Gloucester (SuperCenter)	1	$42.50	$138.10	30.77%	1	$41.70	29.85%
VA	Hampton/Newport News (SC/Neighborhood Mkt)	5	$184.10	$1,334.10	13.80%	5	$175.30	13.34%
VA	Hanover (SC/Neighborhood Mkt)	3	$124.70	$544.50	22.90%	3	$119.70	22.53%
VA	Henrico (SuperCenter)	6	$319.90	$2,103.60	15.21%	6	$304.20	15.00%
VA	James City (SuperCenter)	2	$83.10	$439.20	18.92%	2	$81.80	18.23%
VA	King George (SuperCenter)	1	$41.70	$109.60	38.05%	1	$40.00	39.02%
VA	Lancaster (SuperCenter)	1	$43.10	$78.40	54.97%	1	$42.30	47.05%

IN REVIEW: WALMART

State	County	2025 Stores	2025 Sales (in millions)	2025 County Food Sales	% of 2025 County Market	2024 Stores	2024 Sales (in millions)	% of 2024 County Market
VA	Loudoun (SuperCenter)	3	$143.50	$1,750.60	8.20%	3	$137.10	8.17%
VA	Norfolk City (SC/Neighborhood Mkt)	4	$188.70	$876.30	21.53%	4	$180.30	21.29%
VA	Nottoway (SuperCenter)	1	$39.80	$42.90	92.77%	1	$38.90	92.84%
VA	Orange (SuperCenter)	2	$77.10	$153.80	50.13%	2	$74.20	48.47%
VA	Page (SuperCenter)	1	$47.80	$77.90	61.36%	1	$45.30	61.05%
VA	Portsmouth City (SuperCenter)	1	$35.90	$305.80	11.74%	1	$34.60	11.59%
VA	Powhatan (SuperCenter)	1	$44.30	$84.50	52.43%	1	$43.50	52.47%
VA	Prince William (SuperCenter)	5	$147.60	$2,222.30	6.64%	5	$140.10	6.46%
VA	Shenandoah (SuperCenter)	1	$42.10	$129.80	32.43%	1	$40.80	32.72%
VA	Southampton (SuperCenter)	1	$49.70	$90.20	55.10%	1	$48.30	50.74%
VA	Spotsylvania (SuperCenter)	4	$181.70	$879.60	20.66%	4	$182.30	20.55%
VA	Stafford (SuperCenter)	2	$75.60	$489.30	15.45%	2	$74.60	16.35%
VA	Suffolk City (SuperCenter)	2	$85.00	$354.10	24.00%	2	$83.50	24.20%
VA	Virginia Beach (SC/Neighborhood Mkt)	7	$272.30	$1,875.20	14.52%	7	$264.30	14.43%
VA	Warren (SuperCenter)	1	$48.90	$177.20	27.60%	1	$47.00	27.09%
VA	York (SuperCenter)	1	$48.10	$199.60	24.10%	1	$46.50	22.81%

VA Recap: 85 stores with sales of $3.57 billion. Total retail food sales for VA in the study: $27.39 billion. Walmart share of VA is 13.02%.

Mid-Atlantic Recap: 157 stores with sales of $6.56 billion annually. Mid-Atlantic retail food sales total: $63.0 billion.

Walmart Per Store Average: $41.79 million

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

Source: *Food World*, June 2025

Baltimore-Washington Supermarket Leaders

- Giant Controls 30.3% Of B-W
- Safeway Steady At #2
- Amazon Grocery Adds Units
- Another Big Year At TJ's
- Int'l. Mkts. Gain Share

Rank	Company	2025 Stores	2025 Sales (in millions)	% of 2025 Market	2024 Stores	2024 Sales (in millions)	% of 2024 Market
1	Giant Food	153	$6,205.10	30.06%	154	$6,072.50	30.28%
2	Albertsons (Acme/Balducci's/Safeway)	110	$3,224.90	15.62%	114	$3,162.60	15.77%
3	International Markets	130	$2,140.80	10.37%	127	$2,034.40	10.14%
4	Wegmans	20	$2,007.70	9.73%	20	$1,958.10	9.76%
5	Harris Teeter	49	$1,809.60	8.77%	49	$1,766.40	8.81%
6	Amazon Groc. (AF/WFM)	39	$1,414.00	6.85%	37	$1,326.90	6.62%
7	Weis Markets	49	$957.22	4.64%	49	$941.22	4.69%
8	Aldi	87	$830.20	4.02%	84	$760.90	3.79%
9	Trader Joe's	26	$758.70	3.68%	25	$704.10	3.51%
10	Food Lion	52	$704.70	3.41%	52	$696.60	3.47%
		715	**$20,052.92**	**97.14%**	**711**	**$19,423.72**	**96.84%**

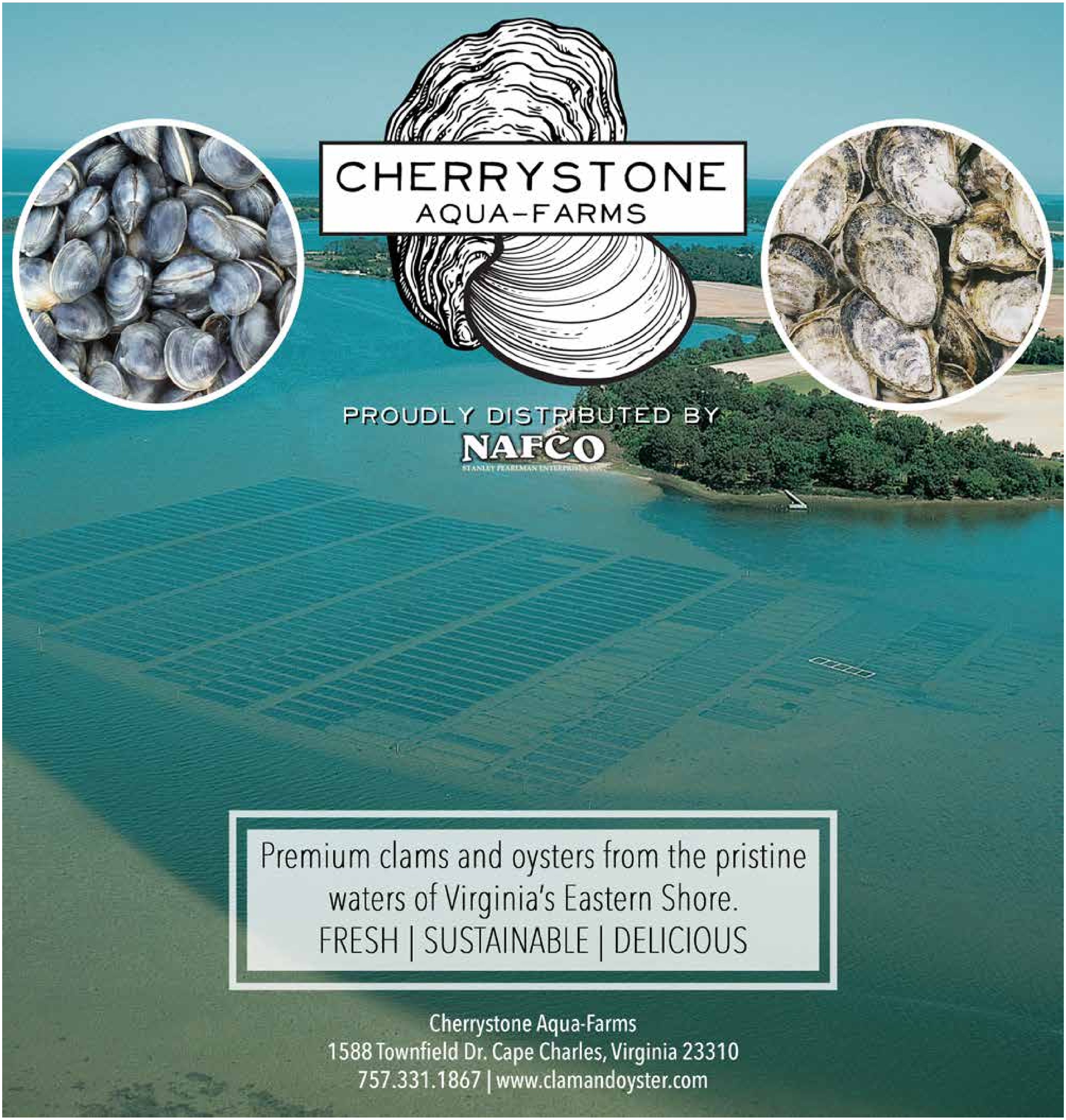
This chart lists the top 10 supermarket retailers in the B-W market. Counties/cities included are: Washington, DC; Anne Arundel, Balt City, Baltimore, Calvert, Carroll, Charles, Frederick, Harford, Howard, Montgomery, Prince George's, Queen Anne's in MD; Arlington, Clarke, Culpeper, Fairfax, Fauquier, King George, Loudoun, Pr. William, Spotsylvania, Stafford and Warren and the independent cities of Alexandria, Fairfax, Falls Church and Fredericksburg in VA. Petroleum sales are not included. ( ) Indicates another banner used by the company. **Total supermarket sales for the area are $20.64 billion.** Source: *Food World,* June 2025

Baltimore-Washington Market Leaders

- Alts. Share Up To 33.8%
- Giant Remains Dominant
- Drug Chains Slide
- No New Stores, But WM Up
- Aldi Is Big Gainer

Rank	Company	2025 Stores	2025 Sales (in millions)	% of 2025 Market	2024 Stores	2024 Sales (in millions)	% of 2024 Market
1	Giant Food	153	$6,205.10	16.75%	154	$6,072.50	16.85%
2	Albertsons (Acme/Balducci's/Safeway)	113	$3,224.90	8.71%	114	$3,162.60	8.78%
3	Walmart (SuperCenter)	60	$2,368.30	6.39%	61	$2,297.80	6.38%
4	International Markets	130	$2,140.80	5.78%	127	$2,034.40	5.65%
5	CVS	325	$2,135.90	5.77%	329	$2,053.60	5.70%
6	Wegmans	20	$2,007.70	5.42%	20	$1,958.10	5.43%
7	Harris Teeter	49	$1,809.60	4.89%	49	$1,766.40	4.90%
8	7-Eleven	680	$1,758.40	4.75%	683	$1,694.70	4.70%
9	Costco	22	$1,747.80	4.72%	22	$1,677.50	4.66%
10	Target (Super Target)	67	$1,451.40	3.92%	67	$1,429.10	3.97%
11	Amazon Groc. (AF/Whole Foods)	39	$1,414.00	3.82%	37	$1,326.90	3.68%
12	Walgreens	166	$1,055.50	2.85%	179	$1,123.30	3.12%
13	Weis Markets	49	$957.22	2.58%	49	$941.22	2.61%
14	Aldi	87	$830.20	2.24%	84	$760.90	2.11%
15	Trader Joe's	26	$758.70	2.05%	25	$704.10	1.95%
16	Food Lion	52	$704.70	1.90%	52	$696.60	1.93%
17	BJ's Wholesale Club	16	$684.90	1.85%	16	$662.40	1.84%
18	Wawa	88	$607.04	1.64%	87	$602.48	1.67%
19	Shoppers	22	$592.30	1.60%	22	$592.60	1.64%
20	Royal Farm Stores	167	$546.70	1.48%	164	$507.40	1.41%
		2,331	**$33,001.16**	**89.09%**	**2,341**	**$32,064.60**	**88.99%**

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: Washingon, DC; Anne Arundel, Balt. City, Baltimore, Calvert, Carroll, Charles, Frederick, Harford, Howard, Montgomery, Prince George's and Queen Anne's in MD; Arlington, Clarke, Culpeper, Fairfax, Fauquier, King George, Loudoun, Pr. William, Spotsylvania, Stafford and Warren and independent cities of Alexandria, Fairfax, Falls Church and Fredericksburg in VA. ( ) Alternate banner. **Total food sales for the area are $37.04 billion.** Source: Food World, June 2025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Karns Hosts Annual Charity Golf Outing June 4 At Range End Golf Club In Dillsburg, PA

Karns held its annual charity golf outing June 4 at Range End Golf Club in Dillsburg, PA. Welcoming golfers were these members of the Karns family Andrea, Megan, Scott and Marleen Karns and Mat, Ruth and Bruce Rudderow.

These fine folks are Joann Gohn of Affinity, Matt Witner and Taylor Williard of Shipley Energy, guest Nicole Richards, and Ellen Abbott of LHM Foundation.

This Affinity Group foursome getting ready to tee off includes Ron Benjamin, Larry Balins, John Gramm and John Hamm.

Enjoying a fine day on the links for a great cause are Dan McCullough, Justin Kapp and Kevin Fox of Karns.

Smiling for our photographer are Denny Keckler of Higher Information Group, Doug DeBolt of Bureau of Account Management, and Mike Hearn of ABC27 in Harrisburg, PA.

Scott Karns of Karns is joined here by Allan Conte and Joe Irwin Jr. of CA Ferolie.

These smiles belong to Dee Shaffer, Megan Karns and Amy Burd of Karns.

Seth Weaver of Weaver's of Wellsville chats at the outing with Karns' Scott Karns.

Retired brokerage executive Tom Morrison (c) plays a round at the outing with two gentlemen from CA Ferolie, his son James Morrison () and Paul McGurkin.

Scott Karns (c) of Karns is joined here by Harrisburg Dairies' Shane Nixon, Alec Dewey, Tom Allwein and Justin Melcher.

These guys are Todd Keys and Gavin Thompson of Karns and John Morrison of Advantage Fresh.

This Karns duo includes Dave Diffenderfer and Dan McCullough.

Keith Meeks of Karns smiles for a photo with Jordan Wagner of Cento and retired industry executive Grant Rumble.

Attending the outing from Martin's Snacks are Butch Potter, Mike Stringent, Nate Leal and Rodney Roy.

IN REVIEW: HARRIS TEETER

State	County	2025 Stores	2025 Sales (in millions)	2025 County Food Sales	% of 2025 County Market	2024 Stores	2024 Sales (in millions)	% of 2024 County Market
DC	Washington	3	$173.40	$2,722.30	6.37%	3	$169.30	6.36%
DC Recap: 3 stores with sales of $173.4 million. Total retail food sales for DC in the study: $2.74 billion. Harris Teeter share of DC is 6.37%.								
DE	Sussex	2	$39.20	$1,114.60	3.52%	2	$38.40	3.56%
DE Recap: 2 stores with sales of $39.2 million. Total retail food sales for DE in the study: $1.7 billion. Harris Teeter share of DE is 2.32%.								
MD	Anne Arundel	1	$38.40	$2,542.10	1.51%	1	$38.20	1.55%
MD	Baltimore City	2	$88.10	$1,520.40	5.79%	2	$86.30	5.51%
MD	Calvert	1	$23.80	$449.80	5.29%	1	$23.60	5.43%
MD	Howard	3	$127.40	$1,336.50	9.53%	3	$122.80	9.55%
MD	Montgomery	7	$202.60	$4,189.10	4.84%	7	$195.40	4.87%
MD	Prince George's	2	$42.70	$3,666.90	1.16%	2	$42.30	1.18%
MD	St. Mary's	1	$31.70	$400.30	7.92%	1	$31.40	7.73%
MD	Talbot	1	$28.60	$236.60	12.09%	1	$28.30	11.52%
MD Recap: 18 stores with sales of $583.3 million. Total retail food sales for MD in the study: $23.76 billion. Harris Teeter share of MD is 2.45%.								
VA	Albemarle	3	$78.10	$744.90	10.48%	3	$77.60	10.84%
VA	Arlington	6	$291.40	$1,036.60	28.11%	6	$282.40	27.19%
VA	Chesapeake City	3	$80.60	$997.70	8.08%	3	$82.50	8.39%
VA	Fairfax	10	$407.40	$6,356.60	6.41%	10	$399.50	6.53%
VA	Fauquier	1	$20.50	$212.80	9.63%	1	$20.30	10.32%
VA	Hampton/Newport News	2	$43.70	$1,334.10	3.28%	2	$43.50	3.31%
VA	James City	3	$112.00	$439.20	25.50%	3	$110.40	24.60%
VA	Loudoun	9	$252.30	$1,750.60	14.41%	9	$247.40	14.75%
VA	Norfolk City	3	$73.90	$876.30	8.43%	3	$73.70	8.70%
VA	Portsmouth City	1	$26.20	$305.80	8.57%	1	$25.90	8.67%
VA	Prince William	4	$141.60	$2,222.30	6.37%	4	$138.90	6.40%
VA	Suffolk City	1	$29.10	$354.10	8.22%	1	$28.90	8.38%
VA	Virginia Beach	9	$206.20	$1,875.20	11.00%	9	$214.40	11.70%
VA Recap: 55 stores with sales of $1.76 billion. Total retail food sales for VA in the study: $27.39 billion. Harris Teeter share of VA is 6.44%.								

Mid-Atlantic Recap: 78 stores with sales of $2.56 billion annually. Mid-Atlantic retail food sales total: $63.0 billion.

Harris Teeter Per Store Average: $32.8 million

Source: *Food World,* June 2025

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Wegmans – I'm repeating part of my analysis from last year because I think it still holds true: 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. While it did not open any new stores during April 1, 2024-March 3, 2025 time period, a new store debuted in Rockville, MD on June 25, just after we went to press on this issue. For this year, comps were solid, and Wegmans continued to overcome some (but not all) of the labor staffing, retention, and morale issues that other retailers are facing at store level A hidden part of Wegmans' success is its site planning and demographics research. While all economic strata have been impacted by the uncertain economic conditions, the company's great (and very, very expensive) store locations - in addition to size, selection, overall product mix and execution - have protected it against major slumps. When you're averaging more than $90 million per store in sales annually, you are doing a lot of things right.

Amazon Grocery - A tale of two banners – Whole Foods (WFM) continues to chug along at a high level (although not quite as high as before COVID) and Amazon Fresh (AF) still needs to go back to school to educate itself on the improvements that are necessary for it to become a "go to" retailer. It's strange that the parent company now has internally connected all of its grocery entities yet can't seem to implement most of the good stuff that WFM features into its AF model. The intangible advantage that WFM (and others like Trader Joe's and Sprouts have) is that its vibe of retailing aligns well with millennials and Gen X, Y and Zers. As for Amazon Fresh, to be fair, it has improved. The newer generation stores that opened in the past year in Alexandria, Silver Spring, and Glen Burnie are significantly better than their first-generation counterparts. But even those stores aren't close to offering customers the full experience they desire. The new stores have some price, selection and merchandising mojo, just not enough. At the end of the day, the most successful retailers stand for something. AF stores aren't there yet.

Aldi – If we could award a "best in class – small store division" trophy, Aldi would win. Its model is not for all shoppers and it's still tough to buy one's total weekly purchases in a footprint that's typically smaller than 25,000 square feet, but for what it is, Aldi scores very highly. There's enough product diversity to fill most of one's shopping cart and its relationship with its private label vendors is strong, yielding high-quality products. If you're Giant, Safeway or Harris Teeter, you already know that Aldi is an excellent "nibbler." Unlike German discount competitor Lidl, Aldi stores are easy to shop and radiate that "connective vibe" that other discounters like Lidl, Amazon Fresh and Grocery Outlet lack. Their decade-long record of success rivals Walmart (only in the small store division), so it's no wonder that Aldi is poised to open 800 new stores nationally (about 15 in the Mid-Atlantic) in the next 18 months. Strong management, excellent store design and in-store execution, and deep corporate pockets make Aldi a top-tier food retailing powerhouse for today and in the future.

Can It Get Much Worse At UNFI?

There's a new gang in town, but don't worry – whatever harm they

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Trade Treks To New Orleans' Ernest N. Morial Convention Center June 1-3 for International Dairy

The International Dairy Deli Bakery Association's annual show took place June 1-3 at the Ernest N. Morial Convention Center in New Orleans. Among the retailers from the *Food World* marketing area on hand were Chuck Link and Gary Redner of Redner's Markets.

This foursome features Mike Merritt of Lowes Food, Jim Wright of W. Lee Flowers & Co., Rich Wright of Dietz & Watson, and Sam A-Fattah of Lowes Food.

Handling business at the show for MDI are Brad Milford and Gary Baker.

All smiles from H&S Bakery are Shawn Paterakis, Emily and JR Paterakis, and Travis Wright.

This Taylor Farms group includes James Hardy, Kent Ford, Jaren Bernardi and Jennifer Watts.

David Flannery of Trader Joe's is joined here by Dave Izzo of Palermo's.

Checking out this year's IDDBA from Affinity Group are Bill Chiodo, Ally Bellanca and Shane Coughlin.

Julie Lester and Christine Leatherwood of Albertsons Mid-Atlantic smile for a photo with Joe Pace III of Pace Target Brokerage.

These gentlemen of A.J. Letizio are Michael Hughes, Jon Ardary, Bill Sando and Geoff Mason.

Grocery Outlet is well represented at IDDBA by Michele Rosenfeld and Lori Kunkle.

Making the trip to New Orleans earlier this month were Xavier Hare of Harris Teeter, Lesly Norton of The Retail Odyssey Company, and Chris Caldwell of Daymon.

This photo features Nancy Rodgers-Fluharty of Pace Target Brokerage, Barry Haas of Weis Markets, Denise Pastore and Ron Campolungo of Give & Go Prepared Foods.

Deli Bakery Show As Retailers, Vendors, Suppliers Learn About What's New In Fresh In 2025

Shane Sampson and Justine Giordano of Vincent Giordano Corp. chat at the show with Jon Herrema and Abby Klein of Meijer, Inc.

Here we have Dave Deola and Jesse Amoroso of Amoroso Baking Co., Rob Palmieri of The Giant Company, Len Amoroso of Amoroso Baking Co., and Noah Michaliszyn of The Giant Company.

These fine folks from CA Ferolie are Joe Irwin, Rusty McDaniel, Sandra Horn and Stephen Demirjian.

These BelGioioso folks are Jack Lincer, Monica Spaulding, Gaetano Auricchio and Federrico Auricchio.

These members of A.J. Letizio are Al Letizio, Michael Hughes and Kevin O'Connor.

On hand in New Orleans from Wawa are Scott Drozdowski and Leslie Johnson.

From Save A Lot, our camera spotted Brett Herr, Brian Dicken and Rodney Nedved.

This Affinity Group photo includes Gary Duncan, Jack Burns, Shane Coughlin, Michael Denk, Melissa Schifano, Ken Hennessy, Ally Bellanca, Brian Ralston, Dan McShain, Dallas Lynch, Cindy Mills and Brent Higgins.

Save A Lot's Paul Casserly, Maureen Pearce and Sally Fatzinger take a quick break for a photo.

This photo features two generations of the Dietz & Watson family - CJ Eni, Chris Eni, Michael Eni, Louis Eni and Nina Eni.

Comprising this Acosta trio are Matthew Evenek, Todd Haley and Dan Gale.

This trio attending the show from Bozzuto's features Paul Criscuolo, Jordan Calixto and Maureen McDonnell.

IN REVIEW: GIANT FOOD

State	County	2025 Stores	2025 Sales (in millions)	2025 County Food Sales	% of 2025 County Market	2024 Stores	2024 Sales (in millions)	% of 2024 County Market
DC	Washington	7	$306.20	$2,722.30	11.25%	7	$295.50	11.10%
DC Recap: 7 stores with sales of $306.2 million. Total retail food sales for DC in the study: $2.74 billion. Giant Food share of DC is 11.25%.								
DE	Sussex	3	$181.70	$1,114.60	16.30%	3	$178.20	16.53%
DE Recap: 3 stores with sales of $181.7 million. Total retail food sales for DE in the study: $1.7 billion. Giant Food share of DE is 10.76%.								
MD	Anne Arundel	9	$460.30	$2,542.10	18.11%	9	$458.20	18.54%
MD	Baltimore City	7	$345.00	$1,520.40	22.69%	8	$344.50	22.00%
MD	Baltimore County	15	$633.40	$3,773.20	16.79%	14	$602.30	16.40%
MD	Calvert	3	$160.80	$449.80	35.75%	3	$157.30	36.20%
MD	Carroll	1	$43.70	$759.30	5.76%	1	$43.10	5.76%
MD	Charles	2	$91.50	$640.50	14.29%	2	$89.40	14.31%
MD	Frederick	3	$133.80	$1,071.80	12.48%	3	$130.30	12.53%
MD	Harford	2	$84.70	$1,152.60	7.35%	2	$83.90	7.44%
MD	Howard	7	$296.50	$1,336.50	22.18%	7	$288.30	22.42%
MD	Montgomery	26	$1,079.20	$4,189.10	25.76%	26	$1,053.70	26.28%
MD	Prince George's	17	$644.30	$3,666.90	17.57%	17	$634.40	17.69%
MD	St. Mary's	1	$39.60	$400.30	9.89%	1	$39.20	9.65%
MD	Talbot	1	$40.20	$236.60	16.99%	1	$38.70	15.75%
MD Recap: 94 stores with sales of $4.05 billion. Total retail food sales for MD in the study: $23.76 billion. Giant Food share of MD is 17.06%.								
VA	Albemarle	1	$37.50	$744.90	5.03%	1	$37.30	5.21%
VA	Arlington	3	$103.20	$1,036.60	9.96%	3	$102.30	9.85%
VA	Fairfax	29	$1,076.50	$6,356.60	16.94%	29	$1,049.60	17.17%
VA	Fauquier	1	$33.90	$212.80	15.93%	1	$33.20	16.87%
VA	Loudoun	8	$259.10	$1,750.60	14.80%	9	$257.40	15.35%
VA	Prince William	8	$228.70	$2,222.30	10.29%	8	$225.40	10.39%
VA	Spotsylvania	2	$94.60	$879.60	10.75%	2	$98.10	11.06%
VA	Stafford	3	$129.70	$489.30	26.51%	3	$125.60	27.53%
VA Recap: 55 stores with sales of $1.96 billion. Total retail food sales for VA in the study: $27.39 billion. Giant Food share of VA is 7.17%.								

Mid-Atlantic Recap: 159 stores with sales of $6.5 billion annually. Mid-Atlantic retail food sales total: $63.0 billion.
Giant Food Per Store Average: $40.9 million

Source: *Food World*, June 2025

TAKING STOCK

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may cause others won't be worse than the damage they inflict upon themselves. I'm talking about UNFI, which in the series of a few days in June was hit with a massive cyberattack which semi-paralyzed their business (and that of thousands of retail food stores nationally). It also announced the loss of one of its biggest customers – Key Food Stores – which represents the largest independent group of independent food retailers in New York City.

In about three months, C&S Wholesale Grocers will once again service approximately 375 independent retailers who are a part of the Key Food co-op, most of whom operate stores in the five boroughs of New York City. C&S was Key Food's primary distributor for many years prior to the change to UNFI.

It seems incredible that over the past 15 years, UNFI (and Supervalu which it acquired in 2018) could hire three of the poorest performing chief executives in the recent history of the grocery business. From 2009-2012, Craig Herkert was at the Supervalu helm when it posted consecutive annual losses of $1.5 billion, $1.04 billion and $1.47 billion from 2010-2012. The next two CEOs – Sam Duncan (2013-2016) and Mark Gross (2016-2018) – both helped restore the company's credibility with its associates and retail customers.

Then, the company regressed again after Steve "Spinmeister" Spinner (UNFI CEO since 2008) expanded the company's presence when it acquired Supervalu for $2.9 billion, including the assumption of $1.6 billion in debt. However, except when he was "bailed out" by the huge sales lift that virtually every wholesaler and retailer experienced during COVID, Spinner's tenure at the large distributor was marked by subpar earnings, sliding stock value, poor communications and an acute ignorance about his new and dominant customer base – conventional independent operators who weren't all that interested in selling "Aunt Tilly's Organic Rolled Oats."

Enter "Sandy" Douglas as chief executive in 2021. Douglas had a stellar 30-year career at Coca-Cola, the last 12 as president of its North American unit. His three-year pit stop as CEO of Staples was a mixed bag (but ended on an incongruous note) and when he was named to replace Spinner in July 2021, there was hope that a professional manager and skilled leader could harness the potential of UNFI.

Wrong.

In his nearly four years as the company's top executive, Douglas has further alienated the wholesaler's associate culture while also frustrating many of UNFI's independent customers, especially in the Northeast and Mid-Atlantic. He's shifted many of the company's administrative services overseas and has reduced and changed some of the old guard retail counselors who served as communications lifelines to UNFI's independent merchants. Furthermore, the company has lost money for 10 consecutive quarters, a fact that Douglas wants to minimize (or ignore) by constantly touting the company's improvements and path towards profitability.

And then on June 5, the company's foundation was shaken by two events: a random and unfortunate cyberattack; and the announcement that it was mutually parting ways with one of its largest non-chain retail customers – Key Food Stores.

According to multiple UNFI customers, full-service deliveries were not fully restored at presstime, nearly two weeks after the IT attack was announced. And those independents believed that delay was unsatisfactory.

"Absolutely awful," said one regional Pennsylvania-based retail

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IN REVIEW: COSTCO

State	County	2025 Stores	2025 Sales (in millions)	2025 County Food Sales	% of 2025 County Market	2024 Stores	2024 Sales (in millions)	% of 2024 County Market
DC	Washington	1	$76.70	$2,722.30	2.82%	1	$72.20	2.71%
DC Recap: 1 store with sales of $76.7 million. Total retail food sales for DC in the study: $2.72 billion. Costco share of DC is 2.82%.								
MD	Anne Arundel	2	$135.70	$2,542.10	5.34%	2	$129.70	5.25%
MD	Baltimore County	2	$142.30	$3,773.20	3.77%	2	$136.20	3.71%
MD	Frederick	1	$61.70	$1,071.80	5.76%	1	$59.80	5.75%
MD	Howard	1	$68.20	$1,336.50	5.10%	1	$65.80	5.12%
MD	Montgomery	2	$203.40	$4,189.10	4.86%	2	$194.30	4.85%
MD	Prince George's	3	$206.80	$3,666.90	5.64%	3	$201.70	5.62%
MD Recap: 11 stores with sales of $818.1 million. Total retail food sales for MD in the study: $23.76 billion. Costco share of MD is 3.44%.								
PA	Dauphin	1	$60.10	$1,134.70	5.30%	1	$58.80	5.33%
PA	Lancaster	1	$36.70	$1,849.30	1.98%	1	$35.90	1.98%
PA Recap: 2 stores with sales of $96.8 million. Total retail food sales for PA in the study: $7.43 billion. Costco share of PA is 1.3%.								
VA	Albemarle	1	$45.10	$744.90	6.05%	1	$43.70	6.10%
VA	Arlington	1	$82.00	$1,036.60	7.91%	1	$79.20	7.62%
VA	Chesterfield	1	$51.20	$1,762.40	2.91%	1	$49.90	2.92%
VA	Fairfax	4	$441.60	$6,356.60	6.95%	4	$425.60	6.96%
VA	Frederick	1	$62.90	$561.70	11.20%	1	$62.00	11.03%
VA	Hampton/Newport News	1	$43.80	$1,334.10	3.28%	1	$43.10	3.28%
VA	Henrico	1	$53.20	$2,103.60	2.53%	1	$51.90	2.56%
VA	Loudoun	2	$191.70	$1,750.60	10.95%	2	$182.30	10.87%
VA	Norfolk City	1	$53.50	$876.30	6.11%	1	$51.80	6.12%
VA	Prince William	2	$99.10	$2,222.30	4.46%	2	$93.60	4.31%
VA	Spotsylvania	1	$38.60	$879.60	4.39%	1	$37.10	4.18%
VA Recap: 16 stores with sales of $1.16 billion. Total retail food sales for VA in the study: $27.39 billion. Costco share of VA is 4.25%.								

Mid-Atlantic Recap: 30 stores with sales of $2.07 billion annually. Mid-Atlantic retail food sales total: $63.0 billion.
Costco Per Store Average: $69.15 million

Source: *Food World,* June 2025


HATFIELD
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CARNITAS
Hatfield
DRY RUBBED BONELESS
PORK ROAST
ALL NATURAL
AMERICAN OWNED AND OPERATED SINCE 1895
18g PROTEIN
COMMITTED TO ANIMAL CARE
BETTER CARE
Hatfield
BETTER PORK

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	12	Annapolis, MD; Baltimore, MD (Edmondson Ave.); Charlotte Hall, MD; Prince Frederick, MD; Dillsburg, PA; Gettysburg, PA*; Harrisburg, PA; Lancaster, PA; Mount Joy, PA; West Springfield, VA; Winchester, VA; Washington, DC (S. Dakota Ave.*)
Amazon Fresh	2	Annapolis, MD; Alexandria, VA
BJ's Wholesale Club	1	Mechanicsburg, PA (r)
Costco	1	Silver Spring Twp., PA
The Fresh Market	2	Falls Church, VA; Reston, VA
Giant Food	1	Berlin, MD
Grocery Outlet	5	Rehoboth Beach, DE*; Rosedale, MD*; Chesterfield, VA; Falls Church, VA; Williamsburg, VA
Harris Teeter	1	Arlington, VA (Ballston) (r)*
Kroger	1	Mechanicsville, VA (r)
LA Mart	1	Baltimore, MD (Edmondson Ave.)
Lidl	9	Bear, DE; Seaford, DE; Baltimore, MD-2 (Orleans St., Belair Rd.); Bethesda, MD; Germantown, MD; Pasadena, MD; Rockville, MD; Falls Church, VA
MOM's Organic Market	2	Washington, DC (Van Ness)*; Severna Park, MD
Publix	2	Chesapeake, VA*; Norfolk, VA
Sprouts	2	Waldorf, MD; Arlington, VA
Target	1	Arcola, VA
Trader Joe's	3	Washington, DC -2 (Monroe St.*, Friendship Hts.); Rockville, MD
Wegmans	2	Rockville, MD*; Charlotte, NC
Weis Markets	5	Middletown, DE; Charlotte Hall, MD; Clarksburg, MD; New Market, MD; Waldorf, MD
Whole Foods	4	Frederick, MD; Arlington, VA (Crystal City); Reston, VA (r); Woodbridge, VA

(r) replacement store

*store opened between 4/1/25 and 6/30/25

Source: *Food World*, June 2025


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Light Brown Sugar
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Powdered Sugar
FLORIDA CRYSTALS
Cane Sugar
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SUGAR
LESS PROCESSED
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MARYLAND COUNTY SHARE OF MARKET: 2025

Total sales for those Maryland counties included in this study are $23.76 billion

ANNE ARUNDEL COUNTY ($2.54 billion)
(Includes Annapolis, Brooklyn Park, Glen Burnie, Linthicum)

- Population 602,350
- # of Households 223,602
- Median Income $120,324
- Under 18 .... 22.5%
- Over 65 .... 16.5%
- Female 50.5%
- White 62.1%
- Black................................... 20.2%
- Hispanic 10.7%
- Asian.................................... 4.7%

Rank	Company	Stores	Sales (in millions)	% of Market
1	Giant Food	9	$460.30	18.11%
2	Albertsons (Safeway)	8	$248.70	9.78%
3	Walmart (SuperCenter)	4	$180.50	7.10%
4	Costco	2	$135.70	5.34%
5	CVS	22	$127.20	5.00%
6	Sam's Club	3	$116.70	4.59%
7	Target	5	$110.50	4.35%
8	7-Eleven	42	$96.70	3.80%
9	Wegmans	1	$94.10	3.70%
10	Military Commissaries	2	$80.05	3.15%
11	Shoppers	2	$72.60	2.86%
12	Food Lion	5	$71.20	2.80%
13	Aldi	7	$68.80	2.71%
14	Amazon Groc. (AF/Whole Foods)	2	$66.20	2.60%
15	Walgreens	16	$63.60	2.50%
16	Wawa	8	$59.44	2.34%
17	Royal Farm Stores	21	$55.20	2.17%
18	Weis Markets	3	$52.76	2.08%
19	B. Green (Green Valley)	3	$48.50	1.91%
20	BJ's Wholesale Club	1	$47.80	1.88%
21	Harris Teeter	1	$38.40	1.51%
22	The Fresh Market	2	$36.90	1.45%
23	International Markets	2	$33.90	1.33%
24	Trader Joe's	1	$22.80	0.90%
25	Geresbeck's Food Market	2	$22.30	0.88%
26	Graul's	2	$22.10	0.87%
27	Sprouts	1	$19.10	0.75%
28	C&S Independents	8	$18.60	0.73%
29	Dash-In	10	$17.10	0.67%
30	Lidl	2	$15.60	0.61%
31	High's	7	$11.80	0.46%
32	Grocery Outlet	1	$6.00	0.24%
33	Save A Lot	1	$4.20	0.17%
34	Rite Aid	1	$3.70	0.15%
	207		**$2,529.05**	**99.49%**

BALTIMORE CITY ($1.52 billion)

- Population 568,271
- # of Households 250,608
- Median Income $59,623
- Under 18 .... 20.9%
- Over 65 .... 14.9%
- Female 53.4%
- White 26.2%
- Black................................... 60.0%
- Hispanic 7.9%
- Asian.................................... 2.5%

Rank	Company	Stores	Sales (in millions)	% of Market
1	Giant Food	7	$345.00	22.69%
2	CVS	13	$99.20	6.52%
3	Albertsons (Safeway)	3	$95.10	6.25%
4	7-Eleven	39	$93.10	6.12%
5	Walgreens	12	$90.60	5.96%
6	Harris Teeter	2	$88.10	5.79%
7	Save A Lot	8	$80.80	5.31%
8	B. Green (Food Depot)	3	$73.50	4.83%
9	Royal Farm Stores	24	$65.30	4.29%
10	Amazon Groc. (Whole Foods)	2	$65.10	4.28%
11	International Markets	7	$64.30	4.23%
12	Shoppers	2	$39.70	2.61%
13	BJ's Wholesale Club	1	$38.70	2.55%
14	Aldi	4	$28.90	1.90%
15	ShopRite (Klein's)	1	$27.70	1.82%
16	Streets Market	3	$25.60	1.68%
17	Target	1	$22.90	1.51%
18	Rite Aid	4	$19.60	1.29%
19	Sprouts	1	$19.30	1.27%
20	Wawa	2	$17.86	1.17%
21	MOM's Organic Market	1	$16.50	1.09%
22	Eddie's of Roland Park	1	$12.00	0.79%
23	Lidl	1	$11.40	0.75%
24	Circle K	2	$4.50	0.30%
25	Dash-In	1	$3.00	0.20%
		145	**$1,447.76**	**95.22%**

BALTIMORE COUNTY ($3.77 billion)
(Includes Catonsville, Dundalk, Randallstown, Reisterstown)

- Population 852,425
- # of Households 330,151
- Median Income $90,904
- Under 18 .... 21.7%
- Over 65 .... 18.7%
- Female 52.5%
- White 51.6%
- Black................................... 32.2%
- Hispanic 8.0%
- Asian.................................... 6.5%

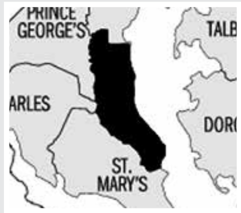
Rank	Company	Stores	Sales (in millions)	% of Market
1	Giant Food	15	$633.40	16.79%
2	Walmart (SuperCenter)	8	$383.40	10.16%
3	Weis Markets	11	$270.14	7.16%
4	Sam's Club	3	$220.60	5.85%
5	Royal Farm Stores	62	$206.20	5.46%
6	Albertsons (Safeway)	7	$182.10	4.83%

See MARYLAND COUNTY SHARE on page 49

MARYLAND COUNTY SHARE OF MARKET: 2025

Continued from page 48

7	Wegmans	2	$179.30	4.75%
8	Walgreens	25	$166.30	4.41%
9	International Markets	9	$154.80	4.10%
10	CVS	24	$153.90	4.08%
11	Costco	2	$142.30	3.77%
12	7-Eleven	47	$126.80	3.36%
13	Target	6	$113.20	3.00%
14	ShopRite (Klein's/Village)	3	$93.10	2.47%
15	Aldi	12	$88.40	2.34%
16	BJ's Wholesale Club	2	$82.50	2.19%
17	Wawa	9	$67.64	1.79%
18	Food Lion	6	$63.90	1.69%
19	Shoppers	2	$49.80	1.32%
20	Lidl	5	$40.20	1.07%
21	Trader Joe's	2	$38.50	1.02%
22	Graul's	3	$36.00	0.95%
23	Amazon Groc. (Whole Foods)	1	$34.20	0.91%
24	MOM's Organic Market	2	$33.80	0.90%
25	Rite Aid	6	$30.70	0.81%
26	The Fresh Market	2	$27.20	0.72%
27	Eddie's of Roland Park	1	$26.70	0.71%
28	Redner's Markets	1	$25.90	0.69%
29	Sprouts	1	$21.80	0.58%
30	Grocery Outlet	3	$16.20	0.43%
31	High's	8	$15.90	0.42%
32	Geresbeck's Food Market	1	$13.40	0.36%
33	Key Food	1	$6.02	0.16%
34	Save A Lot	2	$5.90	0.16%
35	Circle K	2	$5.60	0.15%
36	Sheetz	1	$4.30	0.11%
37	C&S Independents	3	$4.00	0.11%
38	Dash-In	1	$3.40	0.09%
39	ASG	1	$2.10	0.06%
		302	**$3,769.60**	**99.90%**



CALVERT COUNTY ($449.8 million)
(Includes Dunkirk, Prince Frederick, Solomons)

- Population 94,913
- # of Households 33,485
- Median Income $132,059
- Under 18 .... 23.0%
- Over 65 .... 16.9%
- Female 30.5%
- White 74.6%
- Black 14.5%
- Hispanic 5.5%
- Asian 2.1%

1	Giant Food	3	$160.80	35.75%
2	Albertsons (Safeway)	2	$72.00	16.01%
3	Walmart (SuperCenter)	2	$70.80	15.74%
4	Weis Markets	3	$49.96	11.11%
5	Harris Teeter	1	$23.80	5.29%
6	Wawa	2	$18.53	4.12%
7	7-Eleven	7	$15.90	3.53%
8	Walgreens	2	$15.70	3.49%
9	CVS	3	$15.20	3.38%
10	Dash-In	2	$5.10	1.13%
		27	**$447.79**	**99.55%**

CAROLINE COUNTY ($111.6 million)
(Includes Denton, Federalsburg, Greensboro)

- Population 34,248
- # of Households 12,181
- Median Income $66,368
- Under 18 .... 23.7%
- Over 65 .... 17.8%
- Female 51.1%
- White 73.4%
- Black 13.9%
- Hispanic 9.4%
- Asian 1.3%

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 ($759.3 million)
(Includes Eldersburg, Manchester, Taneytown, Westminster)

- Population 177,108
- # of Households 63,487
- Median Income $115,876
- Under 18 .... 22.2%
- Over 65 .... 18.3%
- Female 50.2%
- White 85.3%
- Black 4.6%
- Hispanic 5.3%
- Asian 2.4%

1	Walmart (SuperCenter)	4	$124.70	16.42%
2	Albertsons (Safeway)	3	$105.70	13.92%
3	Weis Markets	5	$103.84	13.68%

See MARYLAND COUNTY SHARE on page 50

MARYLAND COUNTY SHARE OF MARKET: 2025

Continued from page 49

4	The Giant Co. (Martin's)	1	$77.10	10.15%
5	BJ's Wholesale Club	1	$47.90	6.31%
6	Giant Food	1	$43.70	5.76%
7	Food Lion	3	$42.80	5.64%
8	CVS	5	$28.40	3.74%
9	7-Eleven	8	$23.20	3.06%
10	Shoppers	1	$19.20	2.53%
11	Walgreens	3	$18.50	2.44%
12	Aldi	2	$17.30	2.28%
13	Sprouts	1	$16.90	2.23%
14	Target	1	$15.40	2.03%
15	Royal Farm Stores	4	$14.80	1.95%
16	High's	8	$13.60	1.79%
17	Wawa	2	$12.06	1.59%
18	IGA	1	$10.92	1.44%
19	Sheetz	3	$10.50	1.38%
20	Grocery Outlet	1	$5.00	0.66%
21	Rite Aid	1	$4.80	0.63%
		59	**$756.32**	**99.61%**

CECIL COUNTY ($326.2 million)
(Includes Elkton, Northeast)

- Population 106,305
- # of Households 40,172
- Median Income $91,146
- Under 18 .... 22.1%
- Over 65 .... 17.6%
- Female 50.2%
- White 81.7%
- Black.................................... 8.9%
- Hispanic 5.7%
- Asian.................................... 1.6%

1	Walmart (SuperCenter)	2	$66.20	20.29%
2	The Giant Co. (Martin's)	1	$62.70	19.22%
3	Food Lion	3	$35.90	11.01%
4	Wawa	4	$28.23	8.65%
5	Redner's Markets	1	$27.30	8.37%
6	Albertsons (Safeway)	1	$23.90	7.33%
7	Royal Farm Stores	8	$20.50	6.28%
8	Walgreens	3	$13.80	4.23%
9	Aldi	1	$10.10	3.10%
10	High's	4	$9.10	2.79%
11	Grocery Outlet	1	$7.30	2.24%
12	7-Eleven	2	$6.20	1.90%
13	CVS	1	$5.30	1.62%
14	Sheetz	1	$4.90	1.50%
15	Fas-Marts	1	$2.30	0.71%
		34	**$323.73**	**99.24%**

CHARLES COUNTY ($640.5 million)
(Includes Bryan's Road, Waldorf)

- Population 174,478
- # of Households 60,199
- Median Income $120,592
- Under 18 .... 23.7%
- Over 65 .... 14.2%
- Female 51.9%
- White 31.5%
- Black.................................. 54.2%
- Hispanic 8.2%
- Asian.................................... 3.5%

1	Albertsons (Safeway)	3	$103.50	16.16%
2	Giant Food	2	$91.50	14.29%
3	Walmart (SuperCenter)	2	$84.10	13.13%
4	Food Lion	3	$44.50	6.95%
5	BJ's Wholesale Club	1	$41.20	6.43%
6	CVS	7	$38.90	6.07%
7	Sam's Club	1	$37.30	5.82%
8	7-Eleven	11	$36.80	5.75%
9	Target	2	$31.20	4.87%
10	Dash-In	12	$23.60	3.68%
11	Walgreens	4	$21.80	3.40%
12	Wawa	3	$21.21	3.31%
13	Shoppers	1	$15.20	2.37%
14	MOM's Organic Market	1	$14.20	2.22%
15	Weis Markets	1	$11.59	1.81%
16	Aldi	2	$10.90	1.70%
17	Lidl	1	$8.50	1.33%
		57	**$636.00**	**99.30%**

DORCHESTER COUNTY ($72.0 million)
(Includes Cambridge)

- Population 33,138
- # of Households 13,324
- Median Income $60,495
- Under 18 .... 20.6%
- Over 65 .... 23.6%
- Female 52.8%
- White 61.3%
- Black.................................. 29.5%
- Hispanic 6.4%
- Asian.................................... 1.2%

1	Walmart (SuperCenter)	1	$31.10	43.19%
2	Food Lion	1	$12.70	17.64%
3	Aldi	1	$10.20	14.17%
4	Wawa	1	$8.37	11.63%
5	Walgreens	1	$5.90	8.19%
6	Royal Farm Stores	1	$3.40	4.72%
		6	**$71.67**	**99.54%**

See MARYLAND COUNTY SHARE on page 51

MARYLAND COUNTY SHARE OF MARKET: 2025

Continued from page 50

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

- Population 299,317
- # of Households 101,807
- Median Income $120,458
- Under 18 .... 23.4%
- Over 65 .... 15.6%
- Female 50.6%
- White 65.4%
- Black 12.5%
- Hispanic 13.2%
- Asian 6.7%

1	Weis Markets	6	$154.31	14.40%
2	Giant Food	3	$133.80	12.48%
3	Walmart (SuperCenter)	2	$130.50	12.18%
4	Wegmans	1	$77.40	7.22%
5	Food Lion	5	$76.20	7.11%
6	CVS	13	$74.90	6.99%
7	Costco	1	$61.70	5.76%
8	Giant Eagle (Get Go)	4	$42.80	3.99%
9	Albertsons (Safeway)	2	$40.30	3.76%
10	Sam's Club	1	$35.90	3.35%
11	Sheetz	8	$34.10	3.18%
12	Walgreens	5	$28.80	2.69%
13	7-Eleven	14	$26.30	2.45%
14	Royal Farm Stores	6	$24.20	2.26%
15	Aldi	2	$22.80	2.13%
16	Wawa	3	$17.81	1.66%
17	Target	1	$17.40	1.62%
18	International Markets	1	$14.40	1.34%
19	MOM's Organic Market	1	$13.40	1.25%
20	Rutter's Farm Stores	3	$12.50	1.17%
21	Military Commissaries	1	$10.15	0.95%
22	Lidl	1	$9.20	0.86%
23	High's	4	$6.80	0.63%
24	Dash-In	1	$2.30	0.21%
25	C&S Independents	2	$1.00	0.09%
		91	**$1,068.97**	**99.74%**

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

- Population 265,317
- # of Households 100,271
- Median Income $111,317
- Under 18 .... 22.1%
- Over 65 .... 18.0%
- Female 50.8%
- White 72.2%
- Black 16.3%
- Hispanic 5.9%
- Asian 3.3%

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 ($1.34 billion)
(Includes Columbia, Ellicott City, Laurel)

- Population 339,668
- # of Households 120,666
- Median Income $146,982
- Under 18 .... 23.5%
- Over 65 .... 15.9%
- Female 50.7%
- White 46.4%
- Black 21.7%
- Hispanic 8.9%
- Asian 20.5%

1	Giant Food	7	$296.50	22.18%
2	Harris Teeter	3	$127.40	9.53%
3	Wegmans	1	$112.50	8.42%
4	Walmart (SuperCenter)	2	$81.30	6.08%
5	Albertsons (Safeway)	3	$78.80	5.90%
6	Weis Markets	4	$77.36	5.79%
7	Costco	1	$68.20	5.10%
8	International Markets	3	$61.70	4.62%
9	Target	2	$45.50	3.40%
10	Amazon Groc. (Whole Foods)	1	$43.90	3.28%
11	CVS	8	$41.70	3.12%
12	BJ's Wholesale Club	1	$39.10	2.93%
13	Trader Joe's	1	$31.40	2.35%
14	7-Eleven	10	$26.70	2.00%
15	Royal Farm Stores	8	$26.60	1.99%
16	B. Green (Green Valley)	1	$24.40	1.83%

See MARYLAND COUNTY SHARE on page 52

MARYLAND COUNTY SHARE OF MARKET: 2025

Continued from page 51

17	Walgreens	4	$24.10	1.80%
18	Food Lion	2	$23.80	1.78%
19	Sprouts	1	$21.80	1.63%
20	MOM's Organic Market	1	$15.60	1.17%
21	Aldi	1	$12.50	0.94%
22	Roots Markets	1	$12.40	0.93%
23	High's	7	$11.10	0.83%
24	Lidl	1	$9.20	0.69%
25	Grocery Outlet	1	$8.30	0.62%
26	Dash-In	2	$5.70	0.43%
27	Rite Aid	1	$4.60	0.34%
28	Circle K	1	$2.50	0.19%
		79	**$1,334.66**	**99.86%**

KENT COUNTY ($103.9 million)
(Includes Chestertown, Worton)

- Population 19,557
- # of Households 8,530
- Median Income $74,402
- Under 18 .... 15.1%
- Over 65 .... 28.6%
- Female 52.1%
- White 77.0%
- Black................................. 14.0%
- Hispanic 5.9%
- Asian................................... 1.5%

1	Redner's Markets	1	$26.60	25.60%
2	Walgreens	2	$22.30	21.46%
3	Albertsons (Safeway)	1	$20.90	20.12%
4	Food Lion	1	$16.60	15.98%
5	Royal Farm Stores	2	$6.90	6.64%
6	7-Eleven	1	$3.30	3.18%
7	Fas-Marts	1	$2.30	2.21%
8	High's	1	$2.30	2.21%
9	C&S Independents	2	$1.20	1.15%
		12	**$102.40**	**98.56%**

MONTGOMERY COUNTY ($4.19 billion)
(Includes Bethesda, Gaithersburg, Germantown, Rockville)

- Population 1,082,273
- # of Households 387,881
- Median Income $128,733
- Under 18 .... 22.6%
- Over 65 .... 17.7%
- Female 51.3%
- White 40.6%
- Black................................. 20.9%
- Hispanic 21.1%
- Asian................................. 16.1%

1	Giant Food	26	$1,079.20	25.76%
2	Albertsons (Safeway)	18	$544.50	13.00%
3	CVS	43	$471.60	11.26%
4	International Markets	21	$380.60	9.09%
5	Amazon Groc. (AF/Whole Foods)	9	$301.40	7.19%
6	Costco	2	$203.40	4.86%
7	Harris Teeter	7	$202.60	4.84%
8	7-Eleven	67	$162.30	3.87%
9	Trader Joe's	5	$157.00	3.75%
10	Target	6	$135.60	3.24%
11	Wegmans	1	$101.20	2.42%
12	Aldi	9	$91.40	2.18%
13	Walgreens	12	$78.20	1.87%
14	MOM's Organic Market	3	$52.10	1.24%
15	Sam's Club	1	$49.10	1.17%
16	Walmart (SuperCenter)	1	$43.50	1.04%
17	Weis Markets	2	$31.34	0.75%
18	Sprouts	1	$19.10	0.46%
19	Lidl	3	$17.10	0.41%
20	Streets Market	1	$13.50	0.32%
21	Food Lion	1	$12.40	0.30%
22	Roots Markets	1	$11.90	0.28%
23	The Fresh Market	1	$11.10	0.26%
24	Wawa	1	$5.69	0.14%
25	Military Commissaries	1	$5.41	0.13%
26	Royal Farm Stores	1	$4.60	0.11%
27	Dash-In	1	$2.40	0.06%
		245	**$4,188.24**	**99.98%**

PRINCE GEORGE'S COUNTY ($3.67 billion)
(Includes Bowie, Clinton, College Park, Hyattsville, Laurel, Oxon Hill)

- Population 966,627
- # of Households 344,586
- Median Income $100,708
- Under 18 .... 21.8%
- Over 65 .... 15.6%
- Female 51.6%
- White 11.0%
- Black................................. 62.9%
- Hispanic 22.8%
- Asian................................... 4.3%

1	Giant Food	17	$644.30	17.57%
2	International Markets	24	$404.70	11.04%
3	7-Eleven	80	$329.50	8.99%
4	Shoppers	11	$308.60	8.42%
5	Albertsons (Safeway)	9	$293.60	8.01%
6	CVS	43	$276.80	7.55%
7	Target	8	$221.20	6.03%
8	Costco	3	$206.80	5.64%
9	Aldi	13	$129.70	3.54%
10	Walmart (SuperCenter)	4	$103.20	2.81%
11	Wegmans	1	$99.70	2.72%
12	BJ's Wholesale Club	2	$89.70	2.45%
13	Walgreens	11	$69.20	1.89%
14	Wawa	11	$66.95	1.83%
15	Royal Farm Stores	14	$62.00	1.69%

See MARYLAND COUNTY SHARE on page 53

MARYLAND COUNTY SHARE OF MARKET: 2025

Continued from page 52

16	Military Commissaries	1	$47.97	1.31%
17	Lidl	5	$45.10	1.23%
18	Food Lion	3	$43.00	1.17%
19	Harris Teeter	2	$42.70	1.16%
20	Weis Markets	3	$41.32	1.13%
21	Amazon Groc. (Whole Foods)	1	$35.80	0.98%
22	MOM's Organic Market	2	$31.40	0.86%
23	Trader Joe's	1	$19.50	0.53%
24	Save A Lot	4	$18.70	0.51%
25	Dash-In	7	$16.10	0.44%
26	ASG	3	$14.50	0.40%
27	Circle K	1	$2.10	0.06%
		284	**$3,664.14**	**99.92%**

QUEEN ANNE'S COUNTY ($167.3 million)
(Includes Centreville, Chester, Stevensville)

- Population 53,688
- # of Households 19,637
- Median Income $113,347
- Under 18 .... 20.8%
- Over 65 .... 21.3%
- Female 50.2%
- White 84.7%
- Black.................................. 6.3%
- Hispanic 5.7%
- Asian................................... 1.4%

1	Albertsons (Safeway)	2	$66.20	39.57%
2	Food Lion	2	$25.50	15.24%
3	Target	1	$20.50	12.25%
4	Walgreens	2	$13.10	7.83%
5	7-Eleven	4	$11.10	6.63%
6	Royal Farm Stores	3	$9.60	5.74%
7	Wawa	1	$8.57	5.12%
8	CVS	1	$3.90	2.33%
9	Fas-Marts	2	$2.90	1.73%
10	Dash-In	1	$2.80	1.67%
		19	**$164.17**	**98.13%**

SOMERSET COUNTY ($48.4 million)
(Includes Crisfield)

- Population 25,241
- # of Households 8,296
- Median Income $52,462
- Under 18 .... 17.5%
- Over 65 .... 18.3%
- Female 45.3%
- White 51.3%
- Black................................. 40.8%
- Hispanic 4.7%
- Asian................................... 1.0%

1	Food Lion	2	$29.30	60.54%
2	Royal Farm Stores	2	$8.50	17.56%
3	Rite Aid	1	$3.50	7.23%
4	Dash-In	1	$2.80	5.79%
5	Fas-Marts	1	$2.60	5.37%
		7	**$46.70**	**96.49%**

ST. MARY'S COUNTY ($400.3 million)
(Includes Charlotte Hall, Leonardtown, Lexington Park)

- Population 116,469
- # of Households 41,743
- Median Income $114,580
- Under 18 .... 23.9%
- Over 65 .... 14.7%
- Female 49.7%
- White 71.4%
- Black................................. 16.1%
- Hispanic 6.3%
- Asian................................... 3.0%

1	Walmart (SuperCenter)	1	$66.10	16.51%
2	BJ's Wholesale Club	1	$42.30	10.57%
3	Weis Markets	2	$41.02	10.25%
4	Giant Food	1	$39.60	9.89%
5	Wawa	4	$36.47	9.11%
6	Food Lion	2	$34.10	8.52%
7	CVS	6	$31.70	7.92%
8	Harris Teeter	1	$31.70	7.92%
9	Military Commissaries	1	$18.35	4.58%
10	Target	1	$16.70	4.17%
11	Aldi	1	$9.10	2.27%
12	7-Eleven	3	$8.50	2.12%
13	Royal Farm Stores	2	$6.20	1.55%
14	Sheetz	2	$5.70	1.42%
15	Dash-In	2	$4.80	1.20%
16	Walgreens	1	$4.80	1.20%
		31	**$397.14**	**99.21%**

TALBOT COUNTY ($236.6 million)
(Includes Easton, St. Michael's)

- Population 32,344
- # of Households 16,211
- Median Income $84,378
- Under 18 .... 18.3%
- Over 65 .... 30.5%
- Female 52.2%
- White 74.5%
- Black................................. 12.9%
- Hispanic 9.6%
- Asian................................... 1.6%

1	Giant Food	1	$40.20	16.99%
2	BJ's Wholesale Club	1	$39.10	16.53%
3	Harris Teeter	1	$28.60	12.09%
4	Walmart	1	$25.80	10.90%
5	Albertsons (Acme)	1	$21.10	8.92%
6	Target	1	$18.90	7.99%
7	Weis Markets	1	$10.10	4.27%
8	Aldi	1	$9.50	4.02%
9	CVS	2	$8.40	3.55%
10	Royal Farm Stores	2	$7.80	3.30%
11	Wawa	1	$7.33	3.10%

See MARYLAND COUNTY SHARE on page 114

Legislative Line

Major Reorganization Announced At USDA

Barry F. Scher
Policy Solutions LLC

The United States Department of Agriculture (USDA) has released details of its latest reorganization plans and, while expected, let there be no doubt that USDA is going to drastically change under the Trump administration. What's in store? The downsizing program includes massive job cuts, the closure of some USDA offices to reduce "layers of bureaucracy" as Secretary Brooke Rollins stated, and a slew of new rules and regulations resulting from President Trump's "big, beautiful" tax bill, including changes to the USDA's Supplemental Nutrition Assistance Program (SNAP), that will impact food retailers' bottom line.

At press time, the tax bill was still in flux between the Senate and House versions which left a lot of the proposed departmental changes somewhat in limbo within the USDA mega bureaucracy. Republicans are pushing to finalize a bill and Democrats are opposing it but that's par for the game these days. However, Democrats voiced their immediate reaction to changes within USDA by questioning the thousands of job cuts and how the huge agency will be able to continue to deliver services without deterioration. The opposition party cited a report that 16,000 USDA staffers, which is about 16 percent of the agency's workforce, have already accepted offers to leave and more job cuts are planned.

Job Cuts Impact On Fed Workers

I understand the need to seek as many operational efficiencies as possible within USDA. Those in the retail food and general merchandise business do that every day, every week, and month of the year. But we do it methodically, unlike what has occurred in the current administration. The *Washington Post* reported that when Trump took office in January, 2025, 2.4 million people worked for the federal government. At press time, the president and Elon Musk have so far hacked off roughly 6 percent of the federal workforce. All of this simply has to be devastating and a morale buster for federal employees. I sympathize with them. As for me, I'm happy Musk is gone.

Former President Bill Clinton had it right in the 1990s when he was in office and launched his "Reinventing Government" initiative. Over the span of seven years, Clinton's initiative saw the elimination of roughly 400,000 federal jobs – a 17 percent cut – mostly through voluntary buyouts and attrition, according to a recent *Washington Post* article. Trump could learn a thing or two by following Clinton's playbook for a do over of the federal bureaucracy.

Front-of-Package Nutritional Labeling Update

The Food and Drug Administration (FDA) is delaying implementation of a rule and comment period that would require food companies to print a new nutritional label panel on packages. The label panel is often referred to as the "Nutrition Info Box." The extension of the comment period expires on July 15, 2025. I wrote about the proposed new product labels three months ago. You may recall that the proposed new labels would provide information on saturated fat, sodium, and added sugar content in a new

See **LEGISLATIVE LINE** on page 95

THANK YOU!

KLEIN'S 100 YEARS

KLEIN'S FAMILY MARKETS EST. 1925

KLEINS ShopRite

A 4th Generation Family Business!

As we celebrate our 100th Anniversary, we want to thank all our Associates and Suppliers for being with us on this journey — you made it possible!

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

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

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

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

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

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

North Main St. Bel Air
223 N. Main Street
(410) 838-4130
Pharmacy: (410) 638-0600

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

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

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

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

www.ShopRite.com

Four Seasons Hosts Third Annual Fresh Fest Show May 13 At The Junction Center In Manheim, PA

Four Seasons Produce held its third annual independent retailer trade show and conference, Fresh Fest, May 13 at the Junction Center in Manheim, PA. Welcoming guests were Jason Hollinger, Jon Steffy, Ginny Williams and Wayne Hendrickson of the Four Seasons executive team.

Smiling for our photographer are Jessie Myszka of Equal Exchange, Xander Bradfield and Tony Pacella of Buffalo, NY retailer Dash In, and Sheilaih Rojas of Equal Exchange.

Doug Diffenderfer of Karns Markets is joined here by Sandy Mueller and John Davis of JOH.

This foursome features Bryant Escbach of Westfield Egg, Jason Smyth and Christopher Valenti of Healthy Choice Markets, and Ephraim Byler of Westfield Egg.

Here we have Philip Lapp and Nick Kienzle of LaBelle Patrimoine, Shawn Campbell of IGA Foodliner, and Bryan Clary, Scott Jacoby and Jim Kochman of Crop's Fresh Marketplace.

Making their way to Manheim for Fresh Fest are Jose Garcia of Queens retailer Astoria Marketplace, Ralph Krulder of Fresh Express, David Dietz of Lancaster retailer Lemon Street Market, and Rob Haarburger of Fresh Express.

Checking out the show's deals for Landis Markets are Jeremy Moyer, Sara Barndt, Joe Roos, Rich Robbins and Pat Kendig.

George Christ and Kourtnay Sweeny of JP Sales say hello to Jon Day of Dole Fresh.

This trio includes Tom Leo and Mark Kreiner of Mother Earth and Doug Hunt of Good News Natural Foods.

Ed Rogers of L&L Brokerage smiles for a photo with Sebastian Rodriguez of Four Seasons Produce.

Handling business at the show for Hess Brothers are Karly Shaubach and Andy Figart.

These fine folks are Mike Leveille of Common Market, Kevin Stennes of Chelan Fresh, Gianni Tanis and Anna Hand of Frey's Better Foods, Jay Dyer of Chelan Fresh, Madison Miranda of East Aurora (NY) Cooperative Market.

Alexa Nemeth (r) of Kreider Farms is joined is joined here by Four Seasons' Kristopher O'Rourke, Karl Schwebel and David Nurenberger.

Bruce Letchworth of Continental Fresh says hello to Ginny Williams of Four Seasons.

IN REVIEW: AMAZON GROCERY

State	County	2025 Stores	2025 Sales (in millions)	2025 County Food Sales	% of 2025 County Market	2024 Stores	2024 Sales (in millions)	% of 2024 County Market
DC	Washington (Whole Foods)	9	$378.40	$2,722.30	13.90%	9	$363.40	13.65%

DC Recap: 9 stores with sales of $378.4 million. Total retail food sales for DC in the study: $2.72 billion. Amazon Grocery share of DC is 13.9%.

State	County	2025 Stores	2025 Sales (in millions)	2025 County Food Sales	% of 2025 County Market	2024 Stores	2024 Sales (in millions)	% of 2024 County Market
MD	Anne Arundel (AF/WHole Foods)	2	$66.20	$2,542.10	2.60%	1	$55.90	2.26%
MD	Baltimore City (Whole Foods)	2	$65.10	$1,520.40	4.28%	2	$63.60	4.06%
MD	Baltimore County (Whole Foods)	1	$34.20	$3,773.20	0.91%	1	$33.50	0.91%
MD	Howard (Whole Foods)	1	$43.90	$1,336.50	3.28%	1	$43.20	3.36%
MD	Montgomery (AF/Whole Foods)	9	$301.40	$4,189.10	7.19%	7	$266.10	6.64%
MD	Prince George's (Whole Foods)	1	$35.80	$3,666.90	0.98%	1	$34.90	0.97%

MD Recap: 16 stores with sales of $546.6 million. Total retail food sales for MD in the study: $23.76 billion. Amazon Grocery share of MD is 2.3%.

State	County	2025 Stores	2025 Sales (in millions)	2025 County Food Sales	% of 2025 County Market	2024 Stores	2024 Sales (in millions)	% of 2024 County Market
PA	Lancaster (Whole Foods)	1	$39.90	$1,849.30	2.16%	1	$39.30	2.17%

PA Recap: 1 store with sales of $39.9 million. Total retail food sales for PA in the study: $7.43 billion. Amazon Grocery share of PA is 0.54%.

State	County	2025 Stores	2025 Sales (in millions)	2025 County Food Sales	% of 2025 County Market	2024 Stores	2024 Sales (in millions)	% of 2024 County Market
VA	Albemarle (Whole Foods)	1	$38.20	$744.90	5.13%	1	$37.70	5.26%
VA	Arlington (Whole Foods)	2	$68.70	$1,036.60	6.63%	3	$91.80	8.84%
VA	Fairfax (AF/Whole Foods)	11	$385.50	$6,356.60	6.06%	10	$333.00	5.45%
VA	Hampton/Newport News (Whole Foods)	1	$33.30	$1,334.10	2.50%	1	$32.90	2.50%
VA	Henrico (Whole Foods)	2	$48.30	$2,103.60	2.30%	2	$47.60	2.35%
VA	Loudoun (Whole Foods)	1	$34.80	$1,750.60	1.99%	1	$34.30	2.05%
VA	Virginia Beach (Whole Foods)	1	$38.80	$1,875.20	2.07%	1	$36.70	2.00%

VA Recap: 19 stores with sales of $647.6 million. Total retail food sales for VA in the study: $27.39 billion. Amazon Grocery share of VA is 2.36%.

Mid-Atlantic Recap: 45 stores with sales of $1.6 billion annually. Mid-Atlantic retail food sales total: $63.0 billion.

Amazon Grocery Per Store Average: $35.83 million ( ) Name in parentheses indicates another banner used by the company. Source: *Food World,* June 2025

IN REVIEW: ALBERTSONS MID-ATLANTIC

State	County	2025 Stores	2025 Sales (in millions)	2025 County Food Sales	% of 2025 County Market	2024 Stores	2024 Sales (in millions)	% of 2024 County Market
DC	Washington (Safeway)	12	$408.20	$2,722.30	14.99%	12	$399.70	15.01%

DC Recap: 12 stores with sales of $408.2 million. Total retail food sales for DC in the study: $2.72 billion. Albertsons Mid-Atlantic share of DC is 14.99%.

State	County	2025 Stores	2025 Sales (in millions)	2025 County Food Sales	% of 2025 County Market	2024 Stores	2024 Sales (in millions)	% of 2024 County Market
DE	Kent (Acme/Safeway)	2	$59.20	$574.80	10.30%	2	$57.40	10.22%
DE	Sussex (Acme/Safeway)	2	$69.60	$1,114.60	6.24%	2	$68.90	6.39%

DE Recap: 4 stores with sales of $128.8 million. Total retail food sales for DE in the study: $1.7 billion. Albertsons Mid-Atlantic share of DE is 7.62%.

State	County	2025 Stores	2025 Sales (in millions)	2025 County Food Sales	% of 2025 County Market	2024 Stores	2024 Sales (in millions)	% of 2024 County Market
MD	Anne Arundel (Safeway)	8	$248.70	$2,542.10	9.78%	8	$246.30	9.97%
MD	Baltimore City (Safeway)	3	$95.10	$1,520.40	6.25%	3	$94.80	6.05%
MD	Baltimore County (Safeway)	7	$182.10	$3,773.20	4.83%	7	$179.60	4.89%
MD	Calvert (Safeway)	2	$72.00	$449.80	16.01%	2	$70.90	16.32%
MD	Carroll (Safeway)	3	$105.70	$759.30	13.92%	3	$104.80	14.01%
MD	Cecil (Acme)	1	$23.90	$326.20	7.33%	1	$23.70	7.34%
MD	Charles (Safeway)	3	$103.50	$640.50	16.16%	3	$101.80	16.29%
MD	Frederick (Safeway)	2	$40.30	$1,071.80	3.76%	2	$38.90	3.74%
MD	Harford (Safeway)	1	$32.90	$1,152.60	2.85%	1	$32.60	2.89%
MD	Howard (Safeway)	3	$78.80	$1,336.50	5.90%	3	$77.50	6.03%
MD	Kent (Acme)	1	$20.90	$103.90	20.12%	1	$20.60	20.16%
MD	Montgomery (Balducci's/Safeway)	18	$544.50	$4,189.10	13.00%	19	$540.40	13.48%
MD	Prince George's (Safeway)	9	$293.60	$3,666.90	8.01%	9	$283.70	7.91%
MD	Queen Anne's (Acme/Safeway)	2	$66.20	$167.30	39.57%	2	$65.30	41.38%
MD	Talbot (Acme)	1	$21.10	$236.60	8.92%	1	$20.90	8.51%
MD	Wicomico (Acme)	1	$42.30	$327.80	12.90%	1	$40.40	12.73%
MD	Worcester (Acme)	1	$19.40	$258.70	7.50%	1	$19.00	7.46%

MD Recap: 66 stores with sales of $1.99 billion. Total retail food sales for MD in the study: $23.76 billion. Albertsons Mid-Atlantic share of MD is 8.38%.

State	County	2025 Stores	2025 Sales (in millions)	2025 County Food Sales	% of 2025 County Market	2024 Stores	2024 Sales (in millions)	% of 2024 County Market
VA	Arlington (Balducci's/Safeway)	4	$81.40	$1,036.60	7.85%	4	$79.20	7.62%
VA	Culpeper (Safeway)	1	$16.90	$193.00	8.76%	1	$16.40	8.75%
VA	Fairfax (Safeway)	27	$702.30	$6,356.60	11.05%	27	$681.50	11.15%
VA	Fauquier (Safeway)	1	$22.10	$212.80	10.39%	1	$21.80	11.08%
VA	Loudoun (Safeway)	4	$60.60	$1,750.60	3.46%	4	$58.90	3.51%
VA	Prince William (Safeway)	4	$92.10	$2,222.30	4.14%	4	$90.30	4.16%

VA Recap: 41 stores with sales of $975.4 million. Total retail food sales for VA in the study: $27.39 billion. Albertsons Mid-Atlantic share of VA is 5.56%.

Mid-Atlantic Recap: 123 stores with sales of $3.5 billion annually. Mid-Atlantic retail food sales total: $63.0 billion.
Albertsons Mid-Atlantic Per Store Average: $28.48 million ( ) Indicates another banner used by the company.

Source: *Food World*, June 2025

DIRECTORY OF RETAILERS

from page 14

Web: familyownedmarkets.com
Dir.-Marketing: Kevin Hanus
Primary Supplier: MDI
FW Stores: 6
FW Vol.: $103.47 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: Greg Finchum
Primary Supplier: Direct
FW Stores: 256
FW Vol.: $3.55 billion

The Fresh Market

Div. of Cencosud
300 N. Greene St., Ste. 1100
Greensboro, NC 27401
Phone: (336) 272-1338
Web: thefreshmarket.com
Pres./CEO: Brian Johnson
Primary Supplier: UNFI
FW Stores: 17
FW Vol.: $234.6 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.: $35.7 million

The Giant Company

Div. of Ahold Delhaize USA
P.O. Box 249
1149 Harrisburg Pike
Carlisle, PA 17013
Phone: (717) 249-4000
Web: giantfoodstores.com
Pres.: John Ruane
Chief Merchant: Rebecca Lupfer
SVP-Ops./Cust. Exp./Perish. Dist.: Dave Lessard
VP-Omnichannel Merch.-Fresh: Brian Lorenz
VP-Omnichannel Merch.-Center Store: Steve Allison
VP-Mid-Atlantic Div.: Kathy Sweigert
VP-Greater Phil. Div.: Tim Santoro
VP-Marketing: John MacDonald
CFO: William Regan
Chief HR Officer: Jennifer Scott
Primary Distributor: Direct/C&S Wholesale Grocers
FW Stores: 63 (Includes Martin's)
FW Vol.: $3.11 billion

Giant Eagle

700 Cranberry Woods Dr
Cranberry Township, PA 16066
Phone: (412) 963-6200
Web: gianteagle.com
CEO: Bill Artman
Primary Supplier: Direct
FW Stores: 4 (includes Get Go)
FW Vol.: $42.8 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

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SVP-Merch./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: Monica Simmons-Dolce
Dir.-Nonfood: Ashley Gray
Dir.-Merch. Planning: Frank Gallagher
Dir.-Pricing/Promotion: Erik Weenink
Dir.-Brands & Media: Kate Kowalzik
Dir.-Ext. Comms. & Comm Rels.: Felis Andrade
Dir.-Mktg. Planning & Ops.: Kurt Guinther
Dir.-Digital Loyalty & CSM: Ryan Draude
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: 159
FW Vol.: $6.50 billion

Graul's

12200 Tullamore Rd.
Lutherville, MD 21093
Phone: (410) 308-2100
Web: graulsmarket.com
Officers/Buyers: Harold Graul Jr., Fred Graul, Dennis Graul
Primary Supplier: UNFI
FW Stores: 5
FW Vol.: $58.1 million

Great Valu Supermarkets

8258 Richfood Rd.
Mechanicsville, VA 23116
Phone: (804) 746-6000
Web: greatvalu.com
Primary Supplier: UNFI
FW Stores: 5
FW Vol.: $40.6 million
**This is the advertising and marketing arm that serves a group of independents that operate in the FW/FTN marketing area.*

Grocery Outlet

5650 Hollis St.
Emeryville, CA 94608
Phone: (510) 845-1999
Web: groceryoutlet.com
Chmn.: Eric Lundberg
Pres./CEO: Jason Potter
EVP/Chief Ops. Officer: Ramesh Chikkala
EVP/Chief Stores Officer: Pamda Burke
EVP/Chief Purch. Officer: Steve Wilson
Primary Supplier: Direct
FW Stores: 21
FW Vol.: $133.8 million

IGA

275 Schoolhouse Rd.
Cheshire, CT 04611
Phone: (203) 272-3511
FW Stores: 6
FW Vol.: $58.8
**This is the group of independent retailers that operate under the IGA banner and are supplied by Bozzuto's and supervised from its Cheshire, CT headquarters.*

Harris Teeter

Div. of Kroger
701 Crestdale Rd.
Matthews, NC 28105
Phone: (704) 845-3100
Web: harristeeter.com
Pres.: Tammy DeBoer
Primary Supplier: Direct
FW Stores: 78
FW Vol.: $2.56 billion

See **DIRECTORY** on page 72

Discounters Press Traditional Supers In Overcrowded, Diversified $63B Mid-Atlantic Market

from page 1

and closed stores in Baltimore City and Reston, VA. Estimated annual sales for the Ahold Delhaize USA (ADUSA) brand were $6.50 billion.

While CVS remained the leader among all drug retailers, it was a poor year for the entire channel, which saw hundreds of drug stores close during the past 12 months. CVS reduced its Mid-Atlantic store count from 612 to 593, but the Woonsocket, RI-based operator managed to eke out a small sales increase to an estimated $3.77 billion, primarily by picking up revenue from the many shuttered Rite Aid and Walgreens stores near their locations.

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 $3.49 billion to $3.55 billion. During the past year, long time Food Lion president Meg Ham retired to replaced by veteran operations chief Greg Finchum.

Albertsons Mid-Atlantic, which includes the Safeway, Acme and Balducci's banners in this study, had another steady year locally. Nationally, the situation was much different as the Boise, ID-based chain saw its merger effort with Kroger collapse in December 2024, to be followed by finger-pointing and lawsuits from each merchant. For the sixth year in a row, Albertsons opened no new stores in the region (it closed one store in Rockville, MD). Sales increased slightly to $3.5 billion at its 123 stores, most of which are located in the Balt-Wash market. Last month, the big chain promoted veteran Susan Morris to chief executive, replacing Vivek Sankaran, who retired.

The Giant Company (TGC), the ADUSA brand based in Carlisle, PA, remained sixth-ranked among all grocery retailers in the Mid-Atlantic region. Sales at its 63 Giant and Martin's stores (same as last year) in Pennsylvania, Maryland and Virginia rose to an estimated $3.11 billion, up from $3.02 billion in 2024.

The convenience store leader in the $63 billion market remained 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 1,141 stores in the Mid-Atlantic which produced an estimated $2.96 billion in annual sales.

Eighth-ranked Harris Teeter was another conventional supermarket retailer that again experienced flat sales. The Matthews, NC-based Kroger subsidiary rang up estimated sales of $2.56 billion at its 78 area stores (same store count as last year).

Holding down ninth place among Mid-Atlantic retailers was Wegmans, which operated 26 large supermarkets in the region. The Rochester, NY uber-retailer did not open any new stores during our measuring period, however, it is slated to open a new 80,000 square foot store in Rockville, MD, its second in Montgomery County. Wegmans same store sales were better than the industry norm and its estimated annual revenue of $2.43 billion made it the highest per store average supermarket operator in the entire region.

Rounding out the area's top 10 were the 141 International Markets (specialty and ethnic supermarkets that are at least 20,000 square feet in size are grouped together in this survey) that operate in the Mid-Atlantic. On the strength of two additional stores, those ethnic and specialty supermarkets (mostly Hispanic and Asian) amassed an estimated $2.27 billion in annual sales.

Other retailers that topped the $1 billion mark in annual sales in the 89-county region included: Target, which found the sales battle difficult and produced flat estimated extrapolated sales of $2.20 billion at its 112 stores; Costco - 30 stores, estimated extrapolated annual sales of $2.15 billion (one of the best performers in the region); Weis Markets with 99 stores and annual revenue of $2.10 billion; Walgreens (one of the worst performers in the survey) – 311 stores (11 fewer than last year) and $1.87 billion in estimated annual sales; Amazon Grocery (which includes Whole Foods and Amazon Fresh), with 45 total stores (including three new Amazon Fresh units) doing an estimated annual revenue of $1.61 billion; regional convenience store power Wawa (another strong performer this year), whose 210 c-stores (19 more than last year) rang up annual sales of $1.58 billion; Aldi, (another excellent performer) with 153 stores (four more than last year) and estimated annual revenue of $1.44 billion; Kroger, which continued to operate 37 conventional supermarkets and Marketplace stores in the Richmond and Tidewater markets, garnering estimated annual sales of $1.40 billion (during the past year, Kate Mora replaced the now retired Lori Raya as president of the chain's Mid-Atlantic division based in Richmond); BJ's Wholesale Club - 30 stores (the same as 2024) year) enjoyed a very productive year with estimated extrapolated annual sales of $1.22 billion; and Sam's Club (a unit of Walmart), which operated 26 club units in the Mid-Atlantic region (no change from last year), which amassed an estimated extrapolated annual volume of $1.17 billion.

By class of trade, the leaders are: supermarkets - Giant Food (Landover) with 159 stores, $6.50 billion in sales; clubs - Costco with 30 stores, $2.15 billion in estimated extrapolated sales; mass - Walmart with 157 stores and $6.56 billion in estimated extrapolated sales; drug - CVS with 593 stores and $3.77 billion in estimated sales; and convenience stores - 7-Eleven with 1,141 stores and an estimated $2.96 billion in revenue.

Additionally, the 20 military commissaries in the region rang up annual sales of $592.2 million, a $51.7 million increase over last year.

Viewed as a group, the 48 corporate chains in the market operated 5,110 stores and accrued an estimated $61.9 billion in annual sales, good for 98.2 percent of the Mid-Atlantic region's $63 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 seven stores (it acquired Angels Market earlier this year) and $146.4 million in annual volume. Also surpassing the $100 million sales mark was Family Owned Markets, the Millersville, PA retail marketing group that supervises six independent stores in Central PA and northern MD that had annual sales of $103.9 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 $762.8 million, a decline of nearly $24 billion from last year. Collectively, those stores controlled 1.21 percent of the region's food and drug revenue.

IN REVIEW: TARGET

State	County	2025 Stores	2025 Sales (in millions)	2025 County Food Sales	% of 2025 County Market	2024 Stores	2024 Sales (in millions)	% of 2024 County Market
DC	Washington	5	$106.30	$2,722.30	3.90%	5	$104.80	3.94%
DC Recap: 5 stores with sales of $106.3 million. Total retail food sales for DC in the study: $2.74 billion. Target share of DC is 3.9%.								
DE	Kent	1	$19.30	$574.80	3.36%	1	$19.10	3.40%
DE Recap: 1 store with sales of $19.3 million. Total retail food sales for DE in the study: $1.7 billion. Target share of DE is 1.14%.								
MD	Anne Arundel	5	$110.50	$2,542.10	4.35%	5	$109.30	4.42%
MD	Baltimore City	1	$22.90	$1,520.40	1.51%	1	$22.70	1.45%
MD	Baltimore County	6	$113.20	$3,773.20	3.00%	6	$111.50	3.04%
MD	Carroll	1	$15.40	$759.30	2.03%	1	$15.60	2.09%
MD	Charles	2	$31.20	$640.50	4.87%	2	$30.00	4.80%
MD	Frederick	1	$17.40	$1,071.80	1.62%	1	$17.10	1.64%
MD	Harford	3	$54.90	$1,152.60	4.76%	3	$54.60	4.84%
MD	Howard	2	$45.50	$1,336.50	3.40%	2	$45.30	3.52%
MD	Montgomery	6	$135.60	$4,189.10	3.24%	6	$133.50	3.33%
MD	Prince George's	8	$221.20	$3,666.90	6.03%	8	$218.40	6.09%
MD	Queen Anne's	1	$20.50	$167.30	12.25%	1	$20.20	12.80%
MD	St. Mary's	1	$16.70	$400.30	4.17%	1	$16.60	4.09%
MD	Talbot	1	$18.90	$236.60	7.99%	1	$18.60	7.57%
MD	Washington	1	$15.40	$607.50	2.53%	1	$15.20	2.62%
MD	Wicomico	1	$15.90	$327.80	4.85%	1	$15.70	4.95%
MD Recap: 40 stores with sales of $855.2 million. Total retail food sales for MD in the study: $23.76 billion. Target share of MD is 3.6%.								
PA	Cumberland	2	$37.50	$1,289.40	2.91%	2	$37.10	2.97%
PA	Dauphin	2	$31.40	$1,134.70	2.77%	2	$31.10	2.82%
PA	Franklin	1	$18.40	$535.70	3.43%	1	$18.30	3.90%
PA	Lancaster	3	$63.00	$1,849.30	3.41%	3	$62.10	3.43%
PA	Lebanon	1	$19.70	$475.10	4.15%	1	$18.80	4.08%
PA	York	3	$63.10	$1,782.60	3.54%	3	$62.40	3.62%
PA Recap: 12 stores with sales of $233.1 million. Total retail food sales for PA in the study: $7.43 billion. Target share of PA is 3.14%.								
VA	Albemarle	1	$16.40	$744.90	2.20%	1	$16.20	2.26%
VA	Arlington	3	$62.80	$1,036.60	6.06%	3	$62.20	5.99%
VA	Chesapeake City	3	$33.10	$997.70	3.32%	3	$32.70	3.32%
VA	Chesterfield	5	$70.80	$1,762.40	4.02%	5	$70.50	4.12%
VA	Culpeper	1	$16.10	$193.00	8.34%	1	$15.80	8.43%
VA	Fairfax	10	$253.10	$6,356.60	3.98%	10	$245.50	4.02%
VA	Frederick	2	$29.40	$561.70	5.23%	2	$28.90	5.14%
VA	Hampton/Newport News	2	$29.60	$1,334.10	2.22%	2	$29.30	2.23%
VA	Hanover	1	$18.30	$544.50	3.36%	1	$18.00	3.39%
VA	Henrico	6	$109.20	$2,103.60	5.19%	6	$105.20	5.19%
VA	James City	2	$27.30	$439.20	6.22%	2	$26.90	5.99%
VA	Loudoun	3	$65.20	$1,750.60	3.72%	3	$64.80	3.86%
VA	Norfolk City	1	$15.20	$876.30	1.73%	1	$15.00	1.77%
VA	Orange	1	$16.80	$153.80	10.92%	1	$16.50	10.78%
VA	Prince William	4	$66.90	$2,222.30	3.01%	4	$66.30	3.06%
VA	Spotsylvania	2	$35.90	$879.60	4.08%	2	$35.60	4.01%
VA	Stafford	2	$38.60	$489.30	7.89%	2	$37.90	8.31%
VA	Virginia Beach	4	$65.90	$1,875.20	3.51%	4	$65.10	3.55%
VA	Warren	1	$18.20	$177.20	10.27%	1	$18.00	10.37%
VA Recap: 54 stores with sales of $988.8 million. Total retail food sales for VA in the study: $27.39 billion. Target share of VA is 3.61%.								

Mid-Atlantic Recap: 112 stores with sales of $2.2 billion annually. Mid-Atlantic retail food sales total: $63.0 billion.
Target Per Store Average: $19.67 million

Source: *Food World,* June 2025

DELAWARE COUNTY SHARE OF MARKET: 2025

Total sales for those Delaware counties included in the study are $1.69 billion

KENT COUNTY ($574.8 million)
(Includes Dover, Harrington, Smyrna)

- Population 192,690
- # of Households 70,053
- Median Income $72,872
- Under 18 .... 22.7%
- Over 65 .... 18.6%
- Female 52.0%
- White 56.6%
- Black.................................. 30.1%
- Hispanic 8.3%
- Asian.................................... 2.4%

Rank	Company	Stores	Sales (in millions)	% of Market
1	Redner's Markets	3	$79.20	13.78%
2	Wawa	7	$75.91	13.21%
3	Walmart (SuperCenter)	2	$71.20	12.39%
4	Albertsons (Acme/Safeway)	2	$59.20	10.30%
5	Sam's Club	1	$50.60	8.80%
6	Walgreens	8	$41.60	7.24%
7	Food Lion	4	$32.80	5.71%
8	Aldi	3	$26.40	4.59%
9	Target	1	$19.30	3.36%
10	Rite Aid	5	$19.20	3.34%
11	Fas-Marts	11	$18.40	3.20%
12	Royal Farm Stores	8	$18.10	3.15%
13	Military Commissaries	1	$17.85	3.11%
14	CVS	3	$17.80	3.10%
15	International Markets	1	$11.10	1.93%
16	Lidl	1	$8.10	1.41%
17	7-Eleven	1	$3.10	0.54%
18	High's	1	$3.10	0.54%
		63	**$572.96**	**99.68%**

SUSSEX COUNTY ($1.14 billion)
(Includes Bethany Beach, Millville, Seaford)

- Population 271,134
- # of Households 103,213
- Median Income $78,162
- Under 18 .... 17.7%
- Over 65 .... 31.2%
- Female 51.6%
- White 73.9%
- Black.................................. 11.5%
- Hispanic 11.4%
- Asian.................................... 1.5%

Rank	Company	Stores	Sales (in millions)	% of Market
1	Giant Food	3	$181.70	16.30%
2	Walmart (SuperCenter)	4	$151.20	13.57%
3	Food Lion	9	$149.80	13.44%
4	Wawa	10	$94.55	8.48%
5	Walgreens	13	$76.10	6.83%
6	Redner's Markets	3	$73.60	6.60%
7	Albertsons (Acme/Safeway)	2	$69.60	6.24%
8	Weis Markets	3	$61.73	5.54%
9	Royal Farm Stores	21	$57.80	5.19%
10	BJ's Wholesale Club	1	$44.90	4.03%
11	Harris Teeter	2	$39.20	3.52%
12	CVS	6	$33.30	2.99%
13	Aldi	3	$32.50	2.92%
14	Rite Aid	10	$29.50	2.65%
15	The Fresh Market	1	$14.20	1.27%
16	C&S Independents	5	$14.10	1.27%
17	Fas-Marts	7	$11.60	1.04%
18	International Markets	1	$9.80	0.88%
19	7-Eleven	2	$7.30	0.65%
20	Save A Lot	1	$5.10	0.46%
21	High's	2	$4.90	0.44%
		109	**$1,162.48**	**104.30%***

( ) 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 2025

IN REVIEW: WALGREENS

State	County	2025 Stores	2025 Sales (in millions)	2025 County Food Sales	% of 2025 County Market	2024 Stores	2024 Sales (in millions)	% of 2024 County Market
DC	Washington	11	$88.70	$2,722.30	3.26%	12	$92.90	3.49%
DC Recap: 11 stores with sales of $88.7 million. Total retail food sales for DC in the study: $2.74 billion. Walgreens share of DC is 3.26%.								
DE	Kent	8	$41.60	$574.80	7.24%	8	$38.20	6.80%
DE	Sussex	13	$76.10	$1,114.60	6.83%	13	$74.30	6.89%
DE Recap: 21 stores with sales of $117.7 million. Total retail food sales for DE in the study: $1.7 billion. Walgreens share of DE is 6.97%.								
MD	Anne Arundel	16	$63.60	$2,542.10	2.50%	16	$64.90	2.63%
MD	Baltimore City	12	$90.60	$1,520.40	5.96%	19	$141.70	9.05%
MD	Baltimore County	25	$166.30	$3,773.20	4.41%	27	$170.80	4.65%
MD	Calvert	2	$15.70	$449.80	3.49%	2	$15.50	3.57%
MD	Caroline	1	$5.80	$111.60	5.20%	1	$6.00	5.75%
MD	Carroll	3	$18.50	$759.30	2.44%	3	$18.70	2.50%
MD	Cecil	3	$13.80	$326.20	4.23%	3	$14.00	4.34%
MD	Charles	4	$21.80	$640.50	3.40%	4	$21.90	3.51%
MD	Dorchester	1	$5.90	$72.00	8.19%	1	$6.00	8.38%
MD	Frederick	5	$28.80	$1,071.80	2.69%	5	$28.50	2.74%
MD	Harford	11	$60.30	$1,152.60	5.23%	11	$59.90	5.31%
MD	Howard	4	$24.10	$1,336.50	1.80%	4	$23.80	1.85%
MD	Kent	2	$22.30	$103.90	21.46%	2	$22.10	21.62%
MD	Montgomery	12	$78.20	$4,189.10	1.87%	12	$81.70	2.04%
MD	Prince George's	11	$69.20	$3,666.90	1.89%	11	$68.60	1.91%
MD	Queen Anne's	2	$13.10	$167.30	7.83%	2	$12.90	8.17%
MD	St. Mary's	1	$4.80	$400.30	1.20%	1	$4.70	1.16%
MD	Talbot	1	$5.50	$236.60	2.32%	1	$5.30	2.16%
MD	Washington	5	$27.90	$607.50	4.59%	5	$27.70	4.78%
MD	Wicomico	2	$11.40	$327.80	3.48%	2	$11.30	3.56%
MD	Worcester	1	$7.40	$258.70	2.86%	1	$7.30	2.87%
MD Recap: 124 stores with sales of $755.0 million. Total retail food sales for MD in the study: $23.76 billion. Walgreens share of MD is 3.18%.								
PA	Lancaster	1	$5.80	$1,849.30	0.31%	1	$5.70	0.32%
PA	York	3	$17.80	$1,782.60	1.00%	3	$17.60	1.02%
PA Recap: 4 stores with sales of $23.6 million. Total retail food sales for PA in the study: $7.43 billion. Walgreens share of PA is 0.32%.								
VA	Albemarle	1	$5.60	$744.90	0.75%	2	$10.80	1.51%
VA	Arlington	4	$32.10	$1,036.60	3.10%	5	$36.30	3.49%
VA	Chesapeake City	6	$28.90	$997.70	2.90%	6	$28.80	2.93%
VA	Chesterfield	10	$65.80	$1,762.40	3.73%	10	$66.90	3.91%
VA	Culpeper	2	$13.30	$193.00	6.89%	2	$13.10	6.99%
VA	Dinwiddie	4	$19.90	$145.50	13.68%	4	$19.60	13.83%
VA	Essex	1	$5.60	$79.70	7.03%	1	$5.50	7.45%
VA	Fairfax	18	$120.30	$6,356.60	1.89%	20	$124.20	2.03%
VA	Fauquier	2	$11.40	$212.80	5.36%	2	$11.20	5.69%
VA	Frederick	2	$11.50	$561.70	2.05%	2	$11.30	2.01%
VA	Gloucester	1	$6.20	$138.10	4.49%	1	$6.10	4.37%
VA	Hampton/Newport News	7	$50.80	$1,334.10	3.81%	8	$53.40	4.06%
VA	Hanover	3	$16.80	$544.50	3.09%	3	$16.70	3.14%
VA	Henrico	15	$103.40	$2,103.60	4.92%	16	$105.20	5.19%
VA	James City	1	$7.60	$439.20	1.73%	1	$7.40	1.65%
VA	Lancaster	1	$6.20	$78.40	7.91%	1	$6.10	6.79%

IN REVIEW: WALGREENS

State	County	2025 Stores	2025 Sales (in millions)	2025 County Food Sales	% of 2025 County Market	2024 Stores	2024 Sales (in millions)	% of 2024 County Market
VA	Loudoun	11	$61.90	$1,750.60	3.54%	11	$61.50	3.67%
VA	Louisa	1	$5.80	$54.10	10.72%	1	$5.70	11.95%
VA	New Kent	2	$10.50	$71.80	14.62%	2	$10.30	14.74%
VA	Norfolk City	6	$44.30	$876.30	5.06%	6	$42.10	4.97%
VA	Northampton	1	$5.30	$44.50	11.91%	1	$5.10	12.50%
VA	Northumberland	1	$5.20	$22.90	22.71%	1	$5.10	22.57%
VA	Portsmouth City	2	$13.20	$305.80	4.32%	2	$12.90	4.32%
VA	Prince George	1	$5.10	$97.10	5.25%	1	$5.00	6.08%
VA	Prince William	9	$61.80	$2,222.30	2.78%	9	$61.60	2.84%
VA	Richmond	1	$4.80	$24.40	19.67%	1	$4.80	20.00%
VA	Shenandoah	2	$9.30	$129.80	7.16%	2	$9.20	7.38%
VA	Spotsylvania	3	$22.50	$879.60	2.56%	3	$20.00	2.25%
VA	Stafford	1	$4.70	$489.30	0.96%	1	$4.80	1.05%
VA	Suffolk City	3	$16.10	$354.10	4.55%	3	$15.70	4.55%
VA	Virginia Beach	14	$84.20	$1,875.20	4.49%	14	$79.60	4.35%
VA	Westmoreland	2	$9.70	$54.50	17.80%	2	$9.50	18.89%
VA	York	2	$13.00	$199.60	6.51%	2	$12.80	6.28%

VA Recap: 140 stores with sales of $882.8 million. Total retail food sales for VA in the study: $27.39 billion. Walgreens share of VA is 3.22%.

Mid-Atlantic Recap: 300 stores with sales of $1.87 billion annually. Mid-Atlantic retail food sales total: $63.0 billion.
Walgreens Per Store Average: $6.22 million

Source: *Food World,* June 2025

State	County	2025 Stores	2025 Sales (in millions)	2025 County Food Sales	% of 2025 County Market	2024 Stores	2024 Sales (in millions)	% of 2024 County Market
DC	Washington	1	$93.70	$2,722.30	3.44%	1	$91.50	3.44%
DC Recap: 1 store with sales of $93.7 million. Total retail food sales for DC in the study: $2.74 billion. Wegmans share of DC is 3.44%.								
MD	Anne Arundel	1	$94.10	$2,542.10	3.70%	1	$92.90	3.76%
MD	Baltimore County	2	$179.30	$3,773.20	4.75%	2	$173.20	4.72%
MD	Frederick	1	$77.40	$1,071.80	7.22%	1	$76.60	7.36%
MD	Harford	1	$99.10	$1,152.60	8.60%	1	$97.60	8.66%
MD	Howard	1	$112.50	$1,336.50	8.42%	1	$110.20	8.57%
MD	Montgomery	1	$101.20	$4,189.10	2.42%	1	$99.70	2.49%
MD	Prince George's	1	$99.70	$3,666.90	2.72%	1	$98.30	2.74%
MD Recap: 8 stores with sales of $763.3 million. Total retail food sales for MD in the study: $23.76 billion. Wegmans share of MD is 3.21%.								
PA	Cumberland	1	$62.00	$1,289.40	4.81%	1	$61.70	4.94%
PA	Lancaster	1	$70.30	$1,849.30	3.80%	1	$69.40	3.84%
PA Recap: 2 stores with sales of $132.3 million. Total retail food sales for PA in the study: $7.43 billion. Wegmans share of PA is 1.78%.								
VA	Albemarle	1	$77.10	$744.90	10.35%	1	$75.80	10.59%
VA	Chesterfield	1	$67.80	$1,762.40	3.85%	1	$67.10	3.92%
VA	Fairfax	6	$642.50	$6,356.60	10.11%	6	$618.40	10.11%
VA	Henrico	1	$69.70	$2,103.60	3.31%	1	$68.90	3.40%
VA	Loudoun	2	$201.30	$1,750.60	11.50%	2	$196.40	11.71%
VA	Prince William	2	$229.60	$2,222.30	10.33%	2	$226.50	10.44%
VA	Spotsylvania	1	$77.30	$879.60	8.79%	1	$76.80	8.66%
VA	Virginia Beach	1	$71.60	$1,875.20	3.82%	1	$73.10	3.99%
VA Recap: 15 stores with sales of $1.44 billion. Total retail food sales for VA in the study: $27.39 billion. Wegmans share of VA is 5.25%.								

Mid-Atlantic Recap: 26 stores with sales of $2.43 billion annually. Mid-Atlantic retail food sales total: $63.0 billion.
Wegmans Per Store Average: $91.32 million

Source: *Food World,* June 2025

JOH Welcomes Guests To June 1 Cocktail Reception In The French Quarter During IDDBA Show

JOH held a cocktail reception June 1 at Basin Street Station in the French Quarter of New Orleans. Among those attending were Alex Sykes of JOH, Stepa Belov and Mel Pierce of Giant Food, Allan Perkins of JOH, and Cindy Volk of Giant Food.

Here we have K.S. Cho, Pulmuone; Peter Vail, JOH; Ed Swartz, Pulmuone; Kelci Anderson, Hannaford; S.U. Nom, Pulmuone; Gina Peck, Tyson; Ada Lau, ADUSA; Nate Jewell, Hannaford; and Joe Semancik, Pulmuone.

Getting ready for a busy weekend at IDDBA are Joe Navitsky of JOH, Nancy Wingfield and Taneya Clark of The Giant Company and Mike Sonberg of Ithaca Hummus.

Mike Sonberg (c) of Ithaca Hummus smiles for a photo with Chris Darmody and Anne Rakosky of JOH.

This foursome includes Linda Johnstone and Maddy Trofa of Hormel Foods, Allan Perkins of JOH, and Maddie Rice of Giant Food.

from page 64

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

Key Food Stores Co-op, Inc.
100 Matawan Rd., Ste. 100
Matawan, NJ 07747
Phone: (848) 202-3100
Web: keyfoods.com
Pres.: Dean Janeway
COO: George Knobloch
Primary Supplier: UNFI
FW Stores: 1
FW Vol.: $6.02 million
**This retailer-owned co-op serves as the advertising and marketing arm for a group of independent retailers primarily located in the Metro New York market, including Key Fresh, Food Dynasty, Food Emporium, Food Universe and SuperFresh.*

Kroger
Mid-Atlantic Div.
140 Eastshore Dr., Ste. 300
Glen Allen, VA 23059
Phone: (513) 762-4000
Web: kroger.com
Interim CEO: Ronald Sargent
Pres.-Mid-Atlantic Div.: Kate Mora
Primary Supplier: Direct
FW Stores: 37 (Includes Marketplace)
FW Vol.: $1.4 billion

Lidl U.S.
3500 S. Clark St.
Arlington, VA 22202
Phone: (571) 398-5435
Web: lidl.com
Pres./CEO Lidl US: Joel Rampoldt
Chief Buying Officer: Peter Poutre
Primary Supplier: Direct
FW Stores: 61
FW Vol.: $552.4 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: 17
FW Vol.: $280.1 million

Publix
3300 Publix Corporate Pkwy.
Lakeland, FL 33811
Phone: (863) 688-7407
Pres./CEO: Kevin Murphy
Charlotte, NC Div.: Joey Riddle
4135 S. Stream Blvd., Ste. 500
Charlotte, NC 28217
Phone: (704) 424-5017
VP: Joey Riddle
Web: publix.com
Primary Supplier: Direct
FW Stores: 23
FW Vol: $390.4 million

Redner's Markets Inc.
3 Quarry Rd.
Reading, PA 19605
Phone: (610) 926-3700
Web: rednersmarkets.com
Chmn.: Elaine Redner
Pres./CEO: Ryan Redner
COO: Gary M. Redner
VP-Procurement: Dan Eberhart
VP/General Counsel: Jason Hopp
VP-Finance: Richard Rabenold
VP-Groc. Ops.: William Wallace
VP-Perishables: Charles Link
VP-HR: Robert McDonough
VP-IT: Nicholas Hidalgo
Primary Supplier: UNFI
FW Stores: 14
FW Vol.: $322.3 million

Roots Market
5808 Clarksville Square Rd.
Clarksville, MD 21029
Phone: (443) 535-9321
Web: rootsmkt.com

See **DIRECTORY** on page 76

TRADE CALENDAR

August 5-6

Bozzuto's will hold its Big B Expo at Mohegan Sun in Uncasville, CT.

August 26-27

C&S Robesonia will hold its summer selling show at the Lancaster Convention Center.

September 11

Associated Supermarket Group will hold its fall buying show at Citi Field in Flushing, NY. For more information, contact Michelle Mendoza at 516.256.3100 or michelle.mendoza@asghq.com.

September 16

Eastern Produce Council and Idaho Potato Commission, Zespri and Oppenheimer will host an event at Met Life Stadium in East Rutherford, NJ. easternproducecouncil.com/event-9-16-25.php.

October 4

Eastern Produce Council will host the 11th annual Joe DeLorenzo Family Apple Picking at Melick's Town Farm in Oldwick, NJ from 10:00 am to noon. To register, go to easternproducecouncil.com/event-10-4-25.php

October 7-8

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

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.

November 1

The Children's Cancer Foundation's annual gala will be held at Martin's Crosswinds in Greenbelt, MD. For more information, or to see sponsorship opportunities, go to childrenscancerfoundation.org.

December 2-4

The New York Produce Show will be held at Jacob Javits Center and Hilton Midtown in New York City. To register, go to easternproducecouncil.com/event-new-york-produce-show-2025.php.

January 21-24, 2026

FMI Midwinter will be held at the Gaylord Pacific in San Diego. For more information, go to fmi.org/midwinter-conference.

February 1-3, 2026

The NGA Show will be held at the MGM Conference Center in Las Vegas. For more information, go to thengashow.com/event-info.

June 7-9, 2026

The IDDBA show will be held in Orlando.

October 15-17, 2026

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

October 17-20. 2026

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

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

State	County	2025 Stores	2025 Sales (in millions)	2025 County Food Sales	% of 2025 County Market	2024 Stores	2024 Sales (in millions)	% of 2024 County Market
DE	Kent	4	$32.80	$574.80	5.71%	4	$32.60	5.80%
DE	Sussex	9	$149.80	$1,114.60	13.44%	9	$144.90	13.44%
DE Recap: 13 stores with sales of $182.6 million. Total retail food sales for DE in the study: $1.7 billion. Food Lion share of DE is10.81 %.								
MD	Anne Arundel	5	$71.20	$2,542.10	2.80%	5	$71.70	2.90%
MD	Baltimore County	6	$63.90	$3,773.20	1.69%	6	$63.20	1.72%
MD	Caroline	2	$22.50	$111.60	20.16%	2	$22.30	21.36%
MD	Carroll	3	$42.80	$759.30	5.64%	3	$45.30	6.06%
MD	Cecil	3	$35.90	$326.20	11.01%	3	$35.60	11.03%
MD	Charles	3	$44.50	$640.50	6.95%	3	$43.90	7.03%
MD	Dorchester	1	$12.70	$72.00	17.64%	1	$12.50	17.46%
MD	Frederick	5	$76.20	$1,071.80	7.11%	5	$75.70	7.28%
MD	Harford	2	$11.40	$1,152.60	0.99%	2	$11.10	0.98%
MD	Howard	2	$23.80	$1,336.50	1.78%	2	$23.50	1.83%
MD	Kent	1	$16.60	$103.90	15.98%	1	$16.40	16.05%
MD	Montgomery	1	$12.40	$4,189.10	0.30%	1	$12.20	0.30%
MD	Prince George’s	3	$43.00	$3,666.90	1.17%	3	$42.60	1.19%
MD	Queen Anne’s	2	$25.50	$167.30	15.24%	2	$25.10	15.91%
MD	Somerset	2	$29.30	$48.40	60.54%	2	$28.40	58.80%
MD	St. Mary’s	2	$34.10	$400.30	8.52%	2	$32.20	7.93%
MD	Washington	1	$11.70	$607.50	1.93%	1	$11.60	2.00%
MD	Wicomico	4	$40.40	$327.80	12.32%	4	$40.10	12.63%
MD	Worcester	4	$63.10	$258.70	24.39%	4	$61.80	24.26%
MD Recap: 52 stores with sales of $681.0 million. Total retail food sales for MD in the study: $23.76 billion. Food Lion share of MD is 2.87%.								
PA	Franklin	1	$11.50	$535.70	2.15%	1	$11.50	2.45%
PA	York	1	$5.30	$1,782.60	0.30%	1	$5.20	0.30%
PA Recap: 2 stores with sales of $16.8 million. Total retail food sales for PA in the study: $7.43 billion. Food Lion share of PA is 0.23%.								
VA	Accomack	2	$35.20	$107.30	32.81%	2	$34.70	33.21%
VA	Albemarle	6	$70.70	$744.90	9.49%	6	$68.90	9.62%
VA	Caroline	2	$18.40	$29.90	61.54%	2	$18.00	40.72%
VA	Chesapeake City	12	$158.40	$997.70	15.88%	12	$157.20	15.98%
VA	Chesterfield	17	$233.60	$1,762.40	13.25%	17	$224.10	13.10%
VA	Dinwiddie	4	$40.60	$145.50	27.90%	4	$40.90	28.86%
VA	Essex	1	$12.90	$79.70	16.19%	1	$12.70	17.21%
VA	Fairfax	2	$32.40	$6,356.60	0.51%	2	$32.10	0.53%
VA	Fauquier	3	$25.60	$212.80	12.03%	3	$25.30	12.86%
VA	Gloucester	2	$24.30	$138.10	17.60%	2	$24.30	17.39%
VA	Goochland	3	$37.70	$50.40	74.80%	3	$37.40	78.41%
VA	Greene	1	$11.10	$17.90	62.01%	1	$10.80	61.36%
VA	Hampton/Newport News	16	$314.20	$1,334.10	23.55%	16	$306.80	23.34%
VA	Hanover	6	$78.40	$544.50	14.40%	6	$76.10	14.32%
VA	Henrico	14	$216.50	$2,103.60	10.29%	14	$207.30	10.22%
VA	Isle of Wight	3	$35.80	$110.40	32.43%	3	$36.90	36.25%
VA	James City	5	$63.90	$439.20	14.55%	5	$63.50	14.15%
VA	King George	2	$28.60	$109.60	26.09%	2	$28.20	27.51%
VA	King William	2	$32.50	$41.30	78.69%	2	$31.90	78.57%
VA	Lancaster	1	$16.10	$78.40	20.54%	1	$15.80	17.58%
VA	Loudoun	3	$41.80	$1,750.60	2.39%	3	$41.50	2.47%
VA	Louisa	2	$23.60	$54.10	43.62%	2	$23.40	49.06%
VA	Madison	1	$15.10	$18.40	82.07%	1	$14.90	98.68%
VA	Mathews	1	$15.30	$15.50	98.71%	1	$15.10	98.69%
VA	Middlesex	1	$15.50	$29.40	52.72%	1	$15.30	53.68%
VA	New Kent	4	$53.70	$71.80	74.79%	4	$52.90	75.68%
VA	Norfolk City	8	$149.60	$876.30	17.07%	8	$144.30	17.04%

State	County	2025 Stores	2025 Sales (in millions)	2025 County Food Sales	% of 2025 County Market	2024 Stores	2024 Sales (in millions)	% of 2024 County Market
VA	Northampton	2	$23.20	$44.50	52.13%	2	$22.90	56.13%
VA	Northumberland	1	$14.90	$22.90	65.07%	1	$14.80	65.49%
VA	Orange	3	$31.60	$153.80	20.55%	3	$31.20	20.38%
VA	Page	2	$12.40	$77.90	15.92%	2	$12.20	16.44%
VA	Portsmouth City	5	$80.20	$305.80	26.23%	5	$78.00	26.12%
VA	Powhatan	2	$25.30	$84.50	29.94%	2	$24.90	30.04%
VA	Prince George	2	$23.20	$97.10	23.89%	2	$22.90	27.83%
VA	Prince William	9	$148.50	$2,222.30	6.68%	9	$142.30	6.56%
VA	Richmond	1	$15.00	$24.40	61.48%	1	$14.80	61.67%
VA	Shenandoah	3	$45.70	$129.80	35.21%	3	$45.30	36.33%
VA	Southampton	2	$31.90	$90.20	35.37%	2	$31.70	33.30%
VA	Spotsylvania	1	$13.10	$879.60	1.49%	1	$12.90	1.45%
VA	Suffolk City	5	$52.80	$354.10	14.91%	5	$52.40	15.19%
VA	Virginia Beach	21	$272.60	$1,875.20	14.54%	21	$272.10	14.85%
VA	Westmoreland	2	$28.40	$54.50	52.11%	2	$28.20	56.06%
VA	York	4	$51.40	$199.60	25.75%	4	$51.10	25.06%

VA Recap: 189 stores with sales of $2.67 billion. Total retail food sales for VA in the study: $27.39 billion. Food Lion share of VA is 9.76%.

Mid-Atlantic Recap: 256 stores with sales of $3.55 billion annually. Mid-Atlantic retail food sales total: $63.0 billion.
Food Lion Per Store Average: $13.87 million

Source: *Food World*, June 2025

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Owner: Jeff Kaufman
FW Stores: 2
FW Vol.: $24.3 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: 30
FW Vol.: $183.0 million

Sharp Shopper
1100 Sharp Ave.
Ephrata, PA 17522
Phone: (717) 733-9555
Web: sharpshopper.net
Owners: Mike & Darren Sharp
Primary Supplier: Direct
FW Stores: 4
FW Vol.: $55.2 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
Primary Supplier: UNFI
FW Stores: 22
FW Vol.: $592.3 million

ShopRite
5000 Riverside Dr.
Keasby, NJ 08832
Phone: (908) 527-3300
Web: shoprite.com
Chmn.: Sean McMenamin
Pres.: Mike Stigers
CFO: Neil Falcone
EVP-Chief Sales Officer: Darren Caudill
Pres.-Price Rite: Kevin McDonnell
Pres.-ShopRite Supermarkets: Steve Savas
FW Stores: 13 (Includes Klein's/Village/Price Rite)
FW Vol.: $419.7 million
**This is the retail arm of wholesaler grocery co-op Wakefern Food Corp. Most of the ShopRite stores are independently owned. Most of the Price Rite stores are corporately owned.*

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: 11
FW Vol.: $205.3 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: 12
FW Vol.: $104.0 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.: $904.7 million

Wegmans Food Markets, Inc.
1500 Brooks Ave.
P.O. Box 30844
Rochester, NY 14603-0844
Phone: (585) 328-2550
Web: wegmans.com
Chmn.: Danny Wegman
Pres./CEO.: Colleen Wegman
Primary Supplier: Direct
FW Stores: 26
FW Vol.: $2.43 billion

Weis Markets, Inc.
1000 S. 2nd St.
Sunbury, PA 17801
Phone: (570) 286-4571
Web: weismarkets.com
Chmn./Pres./CEO: Jonathan Weis
COO: Bob Gleeson
SVP/CFO/Treasurer: Michael Lockhard
SVP-HR: Jim Marcil
SVP-Operations: David Gose
SVP/CIO: Greg Zeh
VP-Fresh: Doug Becker
VP-Center Store: Mike Gross
Primary Supplier: Direct
FW Stores: 99
FW Vol.: $2.1 billion

DRUG STORES

CVS Caremark
One CVS Dr.
Woonsocket, RI 02895
Phone: (401) 765-1500
Web: cvs.com
Pres./CEO: David Joyner
FW Stores: 593
FW Volume: $3.77 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: Matt Schroeder
FW Stores: 112
FW Vol.: $406.0 million

Walgreens
200 Wilmot Rd.
Deerfield, IL 60015
Phone: (847) 940-2500
Web: walgreens.com
CEO: Tim Wentworth
FW Stores: 300
FW Volume: $1.87 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: 1,141
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 Alex Miller
FW Stores: 13
FW Vol.: $31.0 million

Dash In
Div. of The Wills Group
102 Centennial St.
La Plata, MD 20646
Phone: (301) 932-3600
Chmn./CEO: Julian B. Wills III
Web: dashin.com
Primary Supplier: McLane
FW Stores: 48
FW Vol.: $108.0 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: 88
FW Vol.: $170.6 million

High's
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.: $97.9 million

Miller Marts
Div. of Global Partners llc
800 South St., Ste. 500
Waltham, MA 02453
Phone: (781) 894-8800
Web: gotomillers.com

See **DIRECTORY** on page 113


weis markets
A BIG thanks
to our vendors, suppliers and associates

Eastern Shore Supermarket Leaders

- Food Lion Still Rules
- Albertsons Flat In Delmarva
- Giant Per-Store Sales Solid
- Aldi's Comps Help Grow Share
- Gridlock Impacts E. Shore

Rank	Company	2025 Stores	2025 Sales (in millions)	% of 2025 Market	2024 Stores	2024 Sales (in millions)	% of 2024 Market
1	Food Lion	33	$451.10	30.13%	33	$441.70	30.14%
2	Albertsons (Acme/Safeway)	10	$298.70	19.95%	10	$292.50	19.96%
3	Giant Food	4	$221.90	14.82%	4	$216.90	14.80%
4	Redner's Markets	7	$179.40	11.98%	7	$174.80	11.93%
5	Aldi	11	$112.90	7.54%	11	$108.30	7.39%
6	Weis Markets	4	$71.83	4.80%	4	$70.82	4.83%
7	Harris Teeter	3	$67.80	4.53%	3	$66.70	4.55%
8	International Markets	2	$20.90	1.40%	2	$20.70	1.41%
9	C&S Independents	7	$15.30	1.02%	7	$15.03	1.03%
10	The Fresh Market	1	$14.20	0.95%	1	$13.80	0.94%
		82	**$1,454.03**	**97.11%**	**82**	**$1,421.25**	**96.99%**

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 $1.5 billion.

Source: *Food World,* June 2025

Eastern Shore Market Leaders

- Alts. Share Grows To 53.6%
- WM Comps Remain Strong
- Drug Chains Share Slips to 11.5%
- C-Stores Now Control 16.5%
- Another Good Year For Food Lion

Rank	Company	2025 Stores	2025 Sales (in millions)	% of 2025 Market	2024 Stores	2024 Sales (in millions)	% of 2024 Market
1	Walmart (SuperCenter)	14	$544.50	17.19%	14	$527.80	17.10%
2	Food Lion	33	$451.10	14.24%	33	$441.70	14.31%
3	Albertsons (Acme/Safeway)	10	$298.70	9.43%	10	$292.50	9.47%
4	Wawa	25	$221.93	7.01%	24	$216.04	7.00%
5	Giant Food	4	$221.90	7.01%	4	$216.90	7.03%
6	Walgreens	32	$194.40	6.14%	32	$188.50	6.11%
7	Redner's Markets	7	$179.40	5.66%	7	$174.80	5.66%
8	Royal Farm Stores	61	$176.80	5.58%	60	$167.30	5.42%
9	Aldi	11	$112.90	3.56%	11	$108.30	3.51%
10	CVS	18	$96.60	3.05%	18	$94.50	3.06%
11	Sam's Club	2	$90.60	2.86%	2	$88.50	2.87%
12	BJ's Wholesale Club	2	$84.00	2.65%	2	$82.50	2.67%
13	Target	4	$74.60	2.36%	4	$73.60	2.38%
14	Rite Aid	22	$73.80	2.33%	22	$76.70	2.48%
15	Weis Markets	4	$71.83	2.27%	4	$70.82	2.29%
16	Harris Teeter	3	$67.80	2.14%	3	$66.70	2.16%
17	Fas-Marts	35	$65.20	2.06%	37	$66.90	2.17%
18	7-Eleven	20	$57.50	1.82%	21	$57.60	1.87%
19	International Markets	2	$20.90	0.66%	2	$20.70	0.67%
20	Military Commissaries	1	$17.85	0.56%	1	$15.40	0.50%
		310	**$3,122.31**	**98.57%**	**311**	**$3,047.76**	**98.51%**

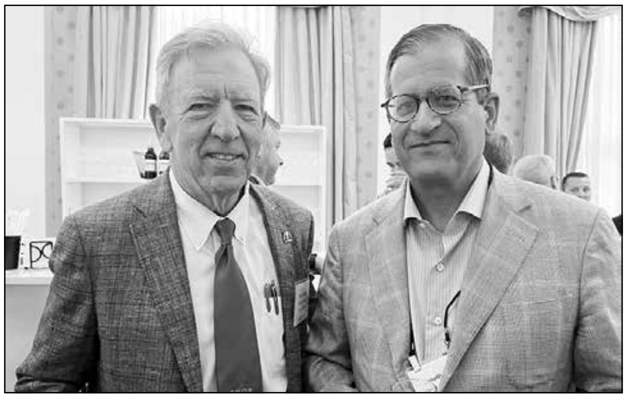
This chart lists the top 20 retailers in the Eastern Shore market which sell groceries, HBC, drugs, general merchandise and tobacco products. Volumes listed include 100% of store sales for supermarkets, c-stores and drug chains. Sales for club stores, Target and Walmart are extrapolated to include comparable 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 $3.17 billion.

Source: *Food World*, June 2025

Pennsylvania Food Merchants Association Holds Annual Meeting May 13-14 At Omni Bedford Springs

The Pennsylvania Food Merchants Association (PFMA) held its annual meeting May 13-14 at Omni Bedford Springs. Walmart's Jason Klipen is welcomed to the meeting by PFMA's Alex Baloga.



These friendly competitors are Ray Charley of Charley Shop N Save and Jonathan Weis of Weis Markets.

Jason Bassett of Sheetz says hello to Victor Vercammen and Steven Berk of Giant Eagle.

Weaver's of Wellsville is well represented at the meeting by Theresa Taylor and Lowell Newcomer.

Tom Cormier of ADUSA chats at the meeting with Michael Gould of Core-Mark.

This foursome from The Giant Company features Eric Dugan, Jason Steimer, Todd O'Hara and Brenda Johnsonbaugh.

Tom Charley of Charley Family Shop N Save and the winner of the inaugural Lisa Dell'Alba Trailblazer Award is congratulated by Rick Maier of Bunzl and PFMA chair Andrea Karns of Karns Foods.

Smiling for our photographer are Egidijius Stankus of VG Trading US and Mike Howells of PFMA.

Jesse Amoroso of Amoroso's Baking says hello to Dawn Roller and Paul Brauer of Brown's Super Stores.

PFMA's Alex Baloga spends some time with Paul Shields and Dennis Cirucci of Dietz & Watson.

Panel #1 featured moderator Mike Howell of PFMA, Dana Barone, Pennsylvania Department of Labor and Industry, Dianne Malley of AJ Drexel Autism Institute, Leslie Long of Popcorn for the People, David Simonetti of Wawa and PFMA's Alex Baloga.

Panel #2 featured moderator Maria Maggio of *Food Trade News/Food World,* Katie Murphy of C&S, Molly Dougherty of Pennsylvania Emergency Management Agency, Christine Heyser, Pennsylvania Department of Human Services, and Jeff Maybray of Northeast Shared Services.

FOOD WORLD MARKET STUDY 2025: RULES & ANALYSIS

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growth is underwhelming. In a static market like Tidewater, Walmart usually succeeds. And with the same 81 stores as last year, "The Behemoth" produced the best same-store sales of any merchant in the $6.6 billion area. As good as Walmart was over the past 12 months, it still trails perennial market leader Food Lion. The Salisbury, NC-based Ahold Delhaize USA brand protected its decades-long number one position with solid sales at its 81 locations. There were only two retailers that increased their store counts this year – c-store chain Wawa (which added three new stores) and Publix (which opened two new units as it continues its market expansion into Tidewater. As has occurred in other markets, Rite Aid and Walgreens both closed stores and saw their market shares decrease. And on a positive note, the five military commissaries in the 11 county/city market continued to rebound with sales increasing from $152.5 million to $166.1 million this year.

How We Do It?

This is the 47th 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, 2024, through March 31, 2025.

To qualify for inclusion in the study, supermarkets must operate at least two stores, and convenience stores must have at least 19 corporate units (although not necessarily all in this region). We do not include the sales of petroleum products or alcohol 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, Grocery Outlet, 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 and alcohol).

Based on publicly-available data from Walmart (Sam's Club), Target, Costco and BJ's, whose sales breakouts by department continue to skew more heavily toward grocery, drug, health and beauty care and general merchandise (HBC and GM), we now factor in that 62 percent of sales at Walmart's 94 SuperCenters in the region are derived from grocery, drug, HBC and GM. For the 65 conventional Walmart ("Division One") discount stores remaining in the market, we utilize an extrapolated percentage of 47 percent of total store sales. We continue to include 100 percent of Walmart's Neighborhood store sales. This year, Walmart opened no new stores and closed a discount (non-SuperCenter) store in Towson, MD.

At Target, which had another 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 and during the past year closed pharmacies inside Targets as well as free-standing locations.

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.

The market study is copyrighted by Best-Met Publishing 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 our three co-publishers -Terri Maloney, VP-editorial director; Maria Maggio, VP-general manager of *Food Trade News*; and Kevin Gallagher, VP-Metro New York and New England.

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

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

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

Kudos, too, to our printer – Evergreen Printing in Bellmawr, NJ – another entrepreneurial enterprise that prioritizes customer service and quality. We salute Thom Scirrotto, Mike McBain, Chris Geimer, Tanya Erickson and the entire Evergreen team for their continued good work.

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

This is my 52nd year of reporting about the grocery industry. I'm thankful and humbled that an idea that my late, great partner Dick Bestany and I had in 1978, has blossomed for so long.

For that longevity and success, 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.

As for Best-Met Publishing, we hope we can continue to publish information-based products that remain relevant and interesting to an evolving audience. The template for success in the food business remains fundamentally unchanged: it's still about selling more stuff and treating your associates and others that you deal with fairly and with respect (a smile helps, too). It's the journey to the end zone that's evolved. Figuring out that path will everyone's hardest test.

Jeff Metzger

Jeff Metzger
Publisher

Niagara Univ. Honors Affinity's Chiodo, Northeast Grocery's Persons At Annual Business Awards Dinner

Niagara University's Holzschuh College of Business Administration honored several individuals for their professional success and their commitment to preparing the next generation of business leaders at its annual Business Awards Dinner April 29 at the Niagara Falls Convention Center.

Bill Chiodo, president of Affinity Group Retail, was honored with the Dean's Award. His leadership and dedication to the consumer-packaged goods industry over his more than 30-year career has inspired countless individuals and strengthened his community. He has represented brands from the hundreds of manufacturers whose products fill the shelves in every department of his store. Chiodo has served on several industry advisory and service boards, such as NFRA, the Saint Joseph's University food marketing program, Food Industry Alliance, City Mission, and is currently the chair of the food marketing program advisory board at Niagara University.

John Persons, CEO of Northeast Grocery Inc., received the Corporate Leadership Award. Person's career with the organization, the parent company of Tops Friendly Markets and Price Chopper/Market 32, began as a Tops cart clerk in 1984. He held positions as store manager, president of Tops, and COO of NGI before being named to his current role in 2024. He is particularly passionate about fulfilling NGI's philanthropic mission and committed to working shoulder-to-shoulder with the communities the company serves. He is currently on the board of directors for Topco Associates and has made a tremendous impact on numerous not-for-profit organizations, including The Children's Hospital of Buffalo Foundation, The Summit Center, Junior Achievement of WNY, The Buffalo Niagara Partnership, Food Industry Alliance of NY, and Kaleida Health.

Niagara University alumna Joanne Israel, general manager of Seneca Niagara Resort & Casino, received the Distinguished

The Rev. James Maher, C.M., Niagara University president, presents the Dean's Award to Bill Chiodo, president of Affinity Group Retail, with Dr. Mark Frascatore, dean of the Holzschuh College of Business Administration.

Accounting Alumnus Award. Israel joined Seneca Gaming Corporation in 2011 after five years in public accounting and held roles of increasing responsibility within the finance division of that organization. In 2016, she was named general manager of the Seneca Buffalo Creek Casino, and in 2018, assistant general manager of the corporation's flagship property, Seneca Niagara Resort & Casino. She was named to her current position in 2022 and leads the property's day-to-day operations, overseeing a team of more than 1,300. She earned both her bachelor of administration degree in accounting and her MBA from Niagara University.

Niagara University alumnus Isaac De Los Santos, vice president at M&T Bank, received the Rising Star Alumnus Award. De Los Santos graduated from Niagara University in 2015 with his bachelor's degree in marketing and received his MBA from NU in 2016. As a senior business banker, he manages a $90 million deposit portfolio and specializes in helping business owners with starting and growing their respective businesses. Much of his community development work includes finding ways to provide financial education to marginalized communities. In 2024, De Los Santos worked on a partnership between NU and M&T to host the Multicultural Small Business Accelerator program, which focused on providing resources and tools to minority-owned businesses in Niagara County.

"Our annual Business Awards Dinner celebrates more than professional success—it celebrates the tremendous impact these exemplary leaders are making on the next generation of business professionals," said Dr. Mark Frascatore, dean of the college. "Their achievements and dedication show our students what's possible when passion meets purpose, and motivate them as they prepare for their future careers."

The AACSB-accredited college also recognized NU alumni Jeffrey and Maryhelen Holzschuh for their visionary leadership, generosity, and unwavering commitment to student success; Mitchell Alegre, an adjunct professor of management, for his lifetime of selfless service to Niagara University, which has left a lasting impact on students, faculty, and the university's mission; and Robert Morreale, NU's former chief financial officer, for guiding the university through both opportunities and challenges with integrity and care.

The Rev. James Maher, C.M., Niagara University president, presents the Corporate Leadership Award to John Persons, CEO of Northeast Grocery Inc., with Dr. Mark Frascatore, dean of the Holzschuh College of Business Administration.

TAKING STOCK

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owner. “Cyberattacks are very random and very unfortunate, but a publicly-traded company that relies on service should have been better prepared. We were told it could be more than a week before full deliveries are restored. That’s totally unacceptable, but what’s almost as bad is the lack of communication from leadership. Their silence is deafening.”

Subsequent to the retailer’s comment, on June 11, “Sandy” Douglas did send a video to UNFI’s customers explaining the situation. I viewed the two minute and 14 second message in which he said the wholesaler was “optimistically aiming to return to a state that resembles our previous operational capacity by June 15.” Of course, that didn’t happen. In fact, the entire video struck me as somewhat disingenuous.

Then temblor number two was revealed: UNFI’s 10-year contract with Key Food, which began in 2021, would be mutually terminated in a few months. The deal was valued at $10 billion and as a sweetener to convince the big retail co-op to join UNFI, the Providence-based distributor would build Key Food a dedicated warehouse near Allentown, PA.

Clearly, UNFI believed that attaining Key Food’s business would also serve as a steppingstone to gain more customers in the large but complex New York City independent market which features small supermarkets, bodegas and greengrocers.

As it turned out, UNFI didn’t have a clue on how to navigate New York City’s busy streets or properly execute the needs of those independents. Several sources told me that UNFI’s annual loss during the first three years of the deal was in the eight-figure range. Those same sources said there were problems from nearly the outset and that both parties had been looking for a way to end the relationship for more than a year.

As a topper, UNFI will also pay Key Food a $53 million termination fee.

Moreover, due to the expected loss of revenue from the Key Food account and the closure of its Allentown DC, UNFI has lowered its full-year earnings outlook (extending into 2026) to between negative $55 million to negative $80 million.

Without even considering the potential litigation that might occur once UNFI’s customers (and perhaps suppliers) assess the damages they incurred due to the cyberattack, don’t you think a change of leadership (along with a board realignment) is needed?

You can’t run a wholesale grocery business from your c-suite, where technology and reducing SG&A costs override the need for personalized service and overall better execution. Despite what Douglas believes are continuing improvements, the bigger picture indicates continued earnings loss and an inefficiently run organization. Successful businesses, in large part, are built on relationships – a decidedly declining component at the UNFI.

If you’re still not sure, revert to the Bill Parcells idiom: “You are what your record says you are.”

‘Round The Trade

Jason Hart, CEO of Aldi U.S., and the man who has led one of the hottest retailers in America, has been promoted to group COO of parent company Aldi Sud (South) and will join the privately-held retailer’s executive board, effective September 1. He will be based in Salzburg,

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Central Pennsylvania Supermarket Leaders

- The Giant Company Share: 54.5%
- Weis Adds 3 Via Acquisitions
- Aldi Gaining Momentum
- Karns Holds Serve
- Supers Losing Ground To Alts.

Rank	Company	2025 Stores	2025 Sales (in millions)	% of 2025 Market	2024 Stores	2024 Sales (in millions)	% of 2024 Market
1	The Giant Co. (Martin's)	52	$2,491.60	54.48%	52	$2,421.50	54.66%
2	Weis Markets	41	$959.55	20.98%	38	$905.54	20.44%
3	Karns Prime & Fancy Foods	10	$186.00	4.07%	10	$186.00	4.20%
4	Aldi	16	$152.20	3.33%	15	$138.90	3.14%
5	Wegmans	2	$132.30	2.89%	2	$131.10	2.96%
6	Family Owned Markets	6	$107.50	2.35%	6	$106.13	2.40%
7	Grocery Outlet	12	$80.20	1.75%	12	$78.90	1.78%
8	C&S Independents	47	$70.50	1.54%	47	$68.33	1.54%
9	Redner's Markets	3	$53.50	1.17%	3	$52.70	1.19%
10	IGA	5	$47.84	1.05%	5	$48.34	1.09%
		194	**$4,281.19**	**93.61%**	**190**	**$4,137.44**	**93.39%**

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 $4.57 billion.

Source: *Food World*, June 2025

Central Pennsylvania Market Leaders

- Alts. Now Control 37.2%
- TGC Again Controls $7.4B Market
- Walmart Comps Among The Best
- C-Stores Share Is 9.9%
- By Attrition, CVS Is Top Drug Chain

Rank	Company	2025 Stores	2025 Sales (in millions)	% of 2025 Market	2024 Stores	2024 Sales (in millions)	% of 2024 Market
1	The Giant Co. (Martin's)	52	$2,491.60	33.56%	52	$2,421.50	33.76%
2	Weis Markets	41	$959.55	12.92%	38	$905.54	12.62%
3	Walmart (SuperCenter)	20	$865.00	11.65%	20	$828.50	11.55%
4	CVS	70	$363.30	4.89%	70	$345.20	4.81%
5	Sheetz	71	$300.90	4.05%	71	$301.00	4.20%
6	Target	12	$233.10	3.14%	12	$229.80	3.20%
7	Turkey Hill	114	$192.10	2.59%	113	$180.74	2.52%
8	Sam's Club	4	$188.60	2.54%	4	$181.60	2.53%
9	Karns Prime & Fancy Foods	10	$186.00	2.50%	10	$186.00	2.59%
10	Rite Aid	47	$158.50	2.13%	50	$172.50	2.40%
11	Rutter's Farm Stores	69	$153.80	2.07%	69	$148.50	2.07%
12	Aldi	16	$152.20	2.05%	15	$138.90	1.94%
13	Wegmans	2	$132.30	1.78%	2	$131.10	1.83%
14	BJ's Wholesale Club	4	$126.00	1.70%	4	$121.90	1.70%
15	Family Owned Markets	6	$107.50	1.45%	6	$106.13	1.48%
16	Costco	2	$96.80	1.30%	2	$94.70	1.32%
17	7-Eleven	31	$86.60	1.17%	31	$81.40	1.13%
18	Grocery Outlet	12	$80.20	1.08%	12	$78.90	1.10%
19	C&S Independents	47	$70.50	0.95%	47	$68.33	0.95%
20	Redner's Markets	3	$53.50	0.72%	3	$52.70	0.73%
		633	**$6,998.05**	**94.25%**	**631**	**$6,774.94**	**94.21%**

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 $7.43 billion.

Source: *Food World*, June 2025

TAKING STOCK

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Austria. Replacing Hart will be current COO Atty McGrath who has spent her entire career with the Batavia, IL-based merchant. She'll have big shoes to replace in Hart, who has been with Aldi since 1993 and was named chief executive in 2015. This year alone, the German discounter is expected to open 225 new stores...as part of its ongoing restructuring effort under new Amazon VP-Worldwide Grocery Jason Buechel the retailer will integrate Whole Foods (where Buechel also serves as CEO) more fully into Amazon's corporate programs including pay structure. Buechel also appointed a new leadership team under his watch which includes a combination of Whole Foods veterans and some core Amazon executives. The new lineup includes Karen Christensen, Bill Jordan, Sonya Gafsi Oblisk, Christina Minardi, Ganesh Rao, Vishy Subramanian and Anana Varadarajan. Despite some obvious roadblocks in its efforts to grow its grocery business (with Amazon Fresh being the most obvious hurdle), CEO Andy Jassy remains optimistic about "Godzilla's" future in grocery. "I'm very bullish about grocery. I think some folks don't realize how large a grocery business Amazon has today. If you look at our center of aisle things – so these are things like consumables, canned good, pharmaceutical items, beauty products, everyday essentials – if I just exclude Whole Foods Market and Amazon Fresh, we did over $100 billion in gross sales last year in our grocery business on these items alone. So, it's a very significant business, and I think we have a bunch of other areas that will allow us to grow in this area." Jassy made his comments during a recent Q&A with some of Amazon's shareholders. During the session, he also singled out the success of Whole Foods and expressed his "excitement" over WFM's new smaller format, Daily Shop, which just opened its third store in Manhattan..."Despite a challenging macroeconomic backdrop, we continue to increase the overall value of our membership." Those are the words of Ron Vachris, Costco's chief executive, after another stellar quarter for the Issaquah, WA-based club king. In Q3, Costco's net revenues increased 8 percent, its comp store sales in the U.S. (ex-gas) rose 7.9 percent, and its net profit jumped from $1.68 billion to $1.90 billion. The 42-year Costco veteran, who was named CEO in January 2024, said that recently imposed foreign tariffs made operations more complicated, but that his company was able to work around some of those increased costs by re-routing many products sourced from nations with higher tariffs to non-U.S. markets. And in the case of some items like bananas and pineapples where a workaround was not possible, the club store retailer chose to absorb those costs internally. In addition to strong sales at the cash register, membership fees generated more than $1.2 billion for the 13-week period, with 4.6 percent of that amount coming from its membership fee increase implemented in September 2024. The company also announced that effective June 30, it will open earlier - one hour for all days but Saturday when its doors open 30 minutes earlier - for its executive club members...the news continues to be not so good for Target, which continued its sluggish performance in the recently completed Q1. To wit: comps dipped 3.8 percent although profit was up 13.6 percent compared to last year's poor Q1 results. Veteran CEO Brian Cornell's outlook for the remainder of 2025 was disappointing, too; he predicted a "low single-digit decline in sales. I said it earlier, but it bears repeating - Target has lost its mojo and like some supermarket operators, it has descended into the "mushy middle" of not differentiating itself from the competition. In his remarks to financial analysts following the earnings release last month, Cornell expressed his concerns about the current economic

TAKING STOCK continues on page 88

PENNSYLVANIA COUNTY SHARE OF MARKET: 2025

Total sales for those Pennsylvania counties included in the study are $7.43 billion

ADAMS COUNTY ($230.2 million)
(Includes Gettysburg, Littlestown)

- Population 107,914
- # of Households 40,411
- Median Income $81,071
- Under 18 .... 19.2%
- Over 65 .... 22.4%
- Female 50.3%
- White 87.9%
- Black 2.3%
- Hispanic 7.7%
- Asian 1.0%

Rank	Company	Stores	Sales (in millions)	% of Market
1	The Giant Co.	1	$67.40	29.28%
2	Weis Markets	2	$43.11	18.73%
3	IGA	3	$31.72	13.78%
4	Walmart	1	$25.80	11.21%
5	Sheetz	4	$19.60	8.51%
6	Rutter's Farm Stores	4	$10.40	4.52%
7	7-Eleven	3	$8.20	3.56%
8	Royal Farm Stores	2	$6.30	2.74%
9	Rite Aid	2	$5.90	2.56%
10	CVS	1	$5.80	2.52%
11	Turkey Hill	2	$4.00	1.74%
		25	**$228.23**	**99.14%**

CUMBERLAND COUNTY ($1.29 billion)
(Includes Carlisle, Mechanicsville)

- Population 275,516
- # of Households 105,187
- Median Income $85,634
- Under 18 .... 20.3%
- Over 65 .... 19.4%
- Female 50.2%
- White 80.8%
- Black 5.5%
- Hispanic 5.3%
- Asian 6.7%

Rank	Company	Stores	Sales (in millions)	% of Market
1	The Giant Co.	10	$511.70	39.69%
2	Walmart (SuperCenter)	4	$137.50	10.66%
3	Weis Markets	5	$114.81	8.90%
4	Karns Prime & Fancy Foods	4	$73.00	5.66%
5	Wegmans	1	$62.00	4.81%
6	CVS	12	$58.20	4.51%
7	Sheetz	13	$50.90	3.95%
8	BJ's Wholesale Club	1	$42.20	3.27%
9	Aldi	4	$39.80	3.09%
10	Target	2	$37.50	2.91%
11	Sam's Club	1	$35.90	2.78%
12	Rite Aid	7	$28.40	2.20%
13	7-Eleven	8	$22.20	1.72%
14	Trader Joe's	1	$20.90	1.62%
15	Grocery Outlet	2	$14.80	1.15%
16	Turkey Hill	7	$11.90	0.92%
17	Rutter's Farm Stores	5	$11.30	0.88%
18	Military Commissaries	1	$11.00	0.85%
19	Wawa	1	$2.10	0.16%
		89	**$1,286.11**	**99.74%**

DAUPHIN COUNTY ($1.13 billion)
(Includes Harrisburg, Middletown, Millersburg)

- Population 293,029
- # of Households 119,763
- Median Income $74,159
- Under 18 .... 22.2%
- Over 65 .... 18.5%
- Female 51.2%
- White 61.2%
- Black 19.1%
- Hispanic 12.0%
- Asian 7.1%

Rank	Company	Stores	Sales (in millions)	% of Market
1	The Giant Co.	9	$485.30	42.77%
2	Walmart (SuperCenter)	2	$92.10	8.12%
3	Weis Markets	4	$78.58	6.93%
4	CVS	13	$69.20	6.10%
5	Karns Prime & Fancy Foods	3	$61.00	5.38%
6	Costco	1	$60.10	5.30%
7	Sheetz	12	$56.90	5.01%
8	Sam's Club	1	$39.90	3.52%
9	Rite Aid	10	$33.70	2.97%
10	Target	2	$31.40	2.77%
11	7-Eleven	8	$21.80	1.92%
12	Turkey Hill	16	$20.60	1.82%
13	Aldi	2	$17.50	1.54%
14	ShopRite (Price Rite)	1	$16.90	1.49%
15	Sharp Shopper	1	$12.40	1.09%
16	Boyer's Markets	1	$10.40	0.92%
17	Lidl	1	$8.20	0.72%
18	Save A Lot	1	$5.20	0.46%
19	Rutter's Farm Stores	2	$4.80	0.42%
20	Wawa	1	$3.22	0.28%
21	C&S Independents	4	$1.70	0.15%
22	ASG	1	$1.00	0.09%
		96	**$1,131.90**	**99.75%**

FRANKLIN COUNTY ($535.7 million)
(Includes Chambersburg, Greencastle, Waynesboro)

- Population 159,285
- # of Households 63,028
- Median Income $74,946
- Under 18 .... 21.9%
- Over 65 .... 20.6%
- Female 50.7%
- White 85.4%
- Black 4.5%
- Hispanic 7.7%
- Asian 1.3%

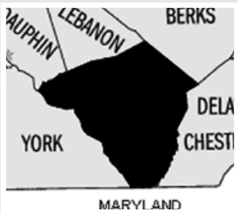
Rank	Company	Stores	Sales (in millions)	% of Market
1	The Giant Co. (Martin's)	4	$168.20	31.40%
2	Walmart (SuperCenter)	2	$94.30	17.60%
3	Weis Markets	5	$83.78	15.64%
4	Sheetz	8	$33.20	6.20%

See **PENNSYLVANIA COUNTY SHARE** on page 87

PENNSYLVANIA COUNTY SHARE OF MARKET: 2025

Continued from page 86

5	BJ's Wholesale Club	1	$32.90	6.14%
6	CVS	5	$23.50	4.39%
7	Aldi	2	$19.20	3.58%
8	Target	1	$18.40	3.43%
9	Rutter's Farm Stores	7	$16.30	3.04%
10	Food Lion	1	$11.50	2.15%
11	Rite Aid	2	$8.10	1.51%
12	Save A Lot	2	$8.10	1.51%
13	Grocery Outlet	1	$7.00	1.31%
14	Turkey Hill	1	$2.80	0.52%
15	7-Eleven	1	$2.50	0.47%
16	C&S Independents	5	$2.30	0.43%
17	Wawa	1	$1.00	0.19%
		49	**$533.08**	**99.51%**



LANCASTER COUNTY ($1.85 billion) (Includes Lancaster, Ephrata)

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

1	The Giant Co.	14	$536.20	28.99%
2	Weis Markets	13	$325.77	17.62%
3	Walmart (SuperCenter)	3	$160.70	8.69%
4	CVS	22	$114.80	6.21%
5	Turkey Hill	60	$106.10	5.74%
6	Sheetz	17	$71.50	3.87%
7	Wegmans	1	$70.30	3.80%
8	Family Owned Markets	3	$68.60	3.71%
9	Target	3	$63.00	3.41%
10	Amazon Groc. (Whole Foods)	1	$39.90	2.16%
11	Aldi	4	$37.20	2.01%
12	Costco	1	$36.70	1.98%
13	Wawa	4	$31.40	1.70%
14	C&S Independents	22	$28.60	1.55%
15	BJ's Wholesale Club	1	$27.80	1.50%
16	Sharp Shopper	2	$25.50	1.38%
17	Grocery Outlet	4	$24.30	1.31%
18	Rite Aid	6	$17.30	0.94%
19	Redner's Markets	1	$15.40	0.83%
20	Rutter's Farm Stores	5	$12.50	0.68%
21	7-Eleven	4	$8.90	0.48%
22	Lidl	1	$7.30	0.39%
23	Walgreens	1	$5.80	0.31%
24	Save A Lot	1	$4.80	0.26%
25	IGA	1	$4.42	0.24%
26	Royal Farm Stores	1	$2.80	0.15%
		196	**$1,847.59**	**99.91%**

LEBANON COUNTY ($475.1 million) (Includes Lebanon)

- Population 145,319
- # of Households 55,846
- Median Income $76,350
- Under 18 .... 22.4%
- Over 65 .... 20.8%
- Female 50.7%
- White 78.7%
- Black.................................... 4.1%
- Hispanic 15.6%
- Asian.................................... 2.8%

1	The Giant Co.	3	$101.60	21.38%
2	Walmart (SuperCenter)	2	$100.40	21.13%
3	Weis Markets	3	$69.80	14.69%
4	Redner's Markets	2	$38.10	8.02%
5	CVS	5	$27.60	5.81%
6	Target	1	$19.70	4.15%
7	Turkey Hill	11	$19.60	4.13%
8	C&S Independents	6	$18.80	3.96%
9	ShopRite	1	$15.20	3.20%
10	Grocery Outlet	2	$12.50	2.63%
11	Rite Aid	3	$10.20	2.15%
12	Sheetz	2	$9.80	2.06%
13	Aldi	1	$9.40	1.98%
14	America's Food Basket	1	$7.80	1.64%
15	7-Eleven	2	$5.80	1.22%
16	Rutter's Farm Stores	2	$5.20	1.09%
		47	**$471.50**	**99.24%**

PERRY COUNTY ($128.3 million) (Includes New Bloomfield)

- Population 46,816
- # of Households 18,232
- Median Income $78,824
- Under 18 .... 20.8%
- Over 65 .... 21.2%
- Female 49.5%
- White 94.3%
- Black.................................... 1.2%
- Hispanic 2.6%
- Asian.................................... 0.6%

1	Karns Prime & Fancy Foods	2	$34.00	26.50%
2	The Giant Co.	1	$32.70	25.49%
3	Weis Markets	1	$20.77	16.19%
4	Rite Aid	3	$13.70	10.68%
5	Sheetz	2	$12.20	9.51%
6	C&S Independents	6	$8.00	6.24%
7	7-Eleven	1	$3.10	2.42%
8	Rutter's Farm Stores	1	$3.10	2.42%
		17	**$127.57**	**99.43%**

See **PENNSYLVANIA COUNTY SHARE** on page 88

PENNSYLVANIA COUNTY SHARE OF MARKET: 2025

Continued from page 87

YORK COUNTY ($1.78 billion)
(Includes Hanover, Shrewsbury, York)

- Population 471,420
- # of Households 180,207
- Median Income $82,238
- Under 18 .... 21.7%
- Over 65 .... 19.2%
- Female 50.2%
- White 79.9%
- Black.................................... 8.0%
- Hispanic 9.9%
- Asian.................................... 1.8%

1	The Giant Co.	10	$588.50	33.01%
2	Walmart (SuperCenter)	6	$254.20	14.26%
3	Weis Markets	8	$222.93	12.51%
4	Sam's Club	2	$112.80	6.33%
5	Rutter's Farm Stores	43	$90.20	5.06%
6	CVS	12	$64.20	3.60%
7	Target	3	$63.10	3.54%
8	Sheetz	13	$46.80	2.63%
9	Rite Aid	14	$41.20	2.31%
10	Family Owned Markets	3	$38.90	2.18%
11	Aldi	3	$29.10	1.63%
12	Royal Farm Stores	9	$28.20	1.58%
13	Turkey Hill	17	$27.10	1.52%
14	BJ's Wholesale Club	1	$23.10	1.30%
15	Grocery Outlet	3	$21.60	1.21%
16	Karns Prime & Fancy Foods	1	$18.00	1.01%
17	Walgreens	3	$17.80	1.00%
18	Sprouts	1	$16.20	0.91%
19	ShopRite (Price Rite)	1	$15.10	0.85%
20	7-Eleven	4	$14.10	0.79%
21	Great Valu	1	$13.70	0.77%
22	IGA	1	$11.70	0.66%
23	C&S Independents	4	$11.10	0.62%
24	Food Lion	1	$5.30	0.30%
25	Save A Lot	1	$4.20	0.24%
26	ASG	1	$1.20	0.07%
		166	**$1,780.33**	**99.87%**

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

Source: *Food World*, June 2025

TAKING STOCK

from page 85

outlook...two of America's largest food-related corporations - Walmart and Procter & Gamble - aren't waiting around for worse news. Both firms are cutting jobs - Walmart is riffing 1,500 corporate positions in the U.S. and P&G will eliminate 7,000 jobs worldwide, which is 15 percent of its non-manufacturing workforce, in the next two years. And as Bob Dylan once famously sang, "you don't need a weatherman to know which way the wind blows" ("Subterranean Homesick Blues"), CEOs know that a cold north wind is likely coming, a reality supported by a recent report from the Bureau of Economic Analysts that revealed consumer spending slowed to 1.2 percent for the first three months of this year (compared to 4 percent in the previous quarter). Additionally, corporate profits declined by $118 billion in the January-March period. As for food retailing, did I also mention that overstoring and potential huge SNAP benefit cuts are also on the menu?

Local Notes

Walmart has opened a 102,000 square foot prescription processing facility in Frederick, MD. The new "central fill" facility will serve approximately 700 stores in the company's Eastern region and is capable of handling up to 100,000 scripts daily. About 200 associates - pharmacists, techs, asset protection and HR employees - will work at the new processing center...another day, another state conquered by c-store dynamo Wawa. Last month it opened its first three stores in Indiana after debuting in Ohio in April. Over the past year, Wawa has also opened stores in these new states: Alabama, Georgia, Kentucky and North Carolina. It also plans to the ribbon on c-stores in West Virginia and Tennessee, both new states, too...according to a vendor update from Giant Food chief merchant Tonya Douglas, the Landover, MD-based brand of Ahold Delhaize USA is implementing full year promotions and strategy planning for 2026. Giant Food will no longer split first half and back half planning. "The time usually set aside to plan for the back half in February and March will be used for plan adjustments and additions of incremental opportunities. This means partners will need to submit a full year plan during the upcoming commercial planning cycle, including fully funded promotions (weekly and cycle-long deal lock); retail media, shopper marketing and loyalty marketing programs; and off-shelf display opportunities (dump bins, shippers, etc.). Additionally, Giant Food will also continue its new four-page base circular, which started in week 22 (late May) of 2025. This change reduces complexity and better showcases offers to customers through a clean and organized layout. It also gives us new opportunities to rethink ineffective tactics; improves promotional performance with more impactful promotions to drive market share, customer traffic, sales, units, and profitability; enables category block reallocation and relocation to better align with brand focus categories; and unlocks reinvestment into stronger cover promotions. With this change, we will continue to run 20 weeks of expanded ads during key seasons with additional themed pages to give us the ability to feature even more relevant products and savings. Giant Food will also reduce complex offers and limit overlays to tactics and offers the have been the most successful in the past. For both changes, it's important to note that they are relevant to local planning with Giant Food and do not impact ADUSA's scaled planning process."...we have more than a few obits to report this month including the passing of Bob Spires, 71, former executive with Acme and Saker and Zallie ShopRites and husband of Judy, who

TAKING STOCK continues on page 115

IN REVIEW: THE GIANT COMPANY

State	County	2025 Stores	2025 Sales (in millions)	2025 County Food Sales	% of 2025 County Market	2024 Stores	2024 Sales (in millions)	% of 2024 County Market
MD	Carroll (Martin's)	1	$77.10	$759.30	10.15%	1	$76.30	10.20%
MD	Cecil (Martin's)	1	$62.70	$326.20	19.22%	1	$61.80	19.14%
MD	Washington (Martin's)	4	$188.20	$607.50	30.98%	4	$182.60	31.50%
MD Recap: 6 stores with sales of $328.0 million. Total retail food sales for MD in the study: $23.76 billion. The Giant Company share of MD is 1.38%.								
PA	Adams	1	$67.40	$230.20	29.28%	1	$66.00	28.30%
PA	Cumberland	10	$511.70	$1,289.40	39.69%	10	$494.90	39.60%
PA	Dauphin	9	$485.30	$1,134.70	42.77%	9	$472.30	42.82%
PA	Franklin (Martin's)	4	$168.20	$535.70	31.40%	4	$164.30	35.05%
PA	Lancaster	14	$536.20	$1,849.30	28.99%	14	$520.70	28.78%
PA	Lebanon	3	$101.60	$475.10	21.38%	3	$97.60	21.16%
PA	Perry	1	$32.70	$128.30	25.49%	1	$32.30	26.28%
PA	York	10	$588.50	$1,782.60	33.01%	10	$573.40	33.23%
PA Recap: 52 stores with sales of $2.49 billion. Total retail food sales for PA in the study: $7.43 billion. The Giant Company share of PA is 33.56%.								
VA	Culpeper (Martin's)	1	$50.00	$193.00	25.91%	1	$48.40	25.83%
VA	Frederick (Martin's)	3	$174.90	$561.70	31.14%	3	$168.60	30.01%
VA	Warren (Martin's)	1	$67.10	$177.20	37.87%	1	$65.40	37.69%
VA Recap: 5 stores with sales of $292.0 million. Total retail food sales for VA in the study: $27.39 billion. The Giant Company share of VA is 1.07%.								

Mid-Atlantic Recap: 63 stores with sales of $3.11 billion annually. Mid-Atlantic retail food sales total: $63.0 billion.
The Giant Company Per Store Average: $49.39 million ( ) Indicates another banner used by the company. Source: *Food World,* June 2025

IN REVIEW: WEIS MARKETS

State	County	2025 Stores	2025 Sales (in millions)	2025 County Food Sales	% of 2025 County Market	2024 Stores	2024 Sales (in millions)	% of 2024 County Market
DE	Sussex	3	$61.73	$1,114.60	5.54%	3	$60.31	5.59%
DE Recap: 3 stores with sales of $61.73 million. Total retail food sales for DE in the study: $1.7 billion. Weis Markets share of DE is 3.65%.								
MD	Anne Arundel	3	$52.76	$2,542.10	2.08%	3	$51.78	2.10%
MD	Baltimore County	11	$270.14	$3,773.20	7.16%	12	$282.26	7.68%
MD	Calvert	3	$49.96	$449.80	11.11%	3	$47.99	11.04%
MD	Carroll	5	$103.84	$759.30	13.68%	5	$100.79	13.48%
MD	Charles	1	$11.59	$640.50	1.81%	1	$11.42	1.83%
MD	Frederick	6	$154.31	$1,071.80	14.40%	6	$151.20	14.54%
MD	Harford	2	$53.83	$1,152.60	4.67%	2	$51.54	4.57%
MD	Howard	4	$77.36	$1,336.50	5.79%	3	$64.14	4.99%
MD	Montgomery	2	$31.34	$4,189.10	0.75%	2	$29.22	0.73%
MD	Prince George's	3	$41.32	$3,666.90	1.13%	3	$40.13	1.12%
MD	St. Mary's	2	$41.02	$400.30	10.25%	2	$37.72	9.29%
MD	Talbot	1	$10.10	$236.60	4.27%	1	$10.51	4.28%
MD	Washington	3	$74.44	$607.50	12.25%	3	$72.17	12.45%
MD Recap: 46 stores with sales of $972.1 million. Total retail food sales for MD in the study: $23.76 billion. Weis Markets share of MD is 4.09%.								
PA	Adams	2	$43.11	$230.20	18.73%	2	$42.93	18.41%
PA	Cumberland	5	$114.81	$1,289.40	8.90%	5	$111.25	8.90%
PA	Dauphin	4	$78.58	$1,134.70	6.93%	4	$72.65	6.59%
PA	Franklin	5	$83.78	$535.70	15.64%	2	$39.49	8.42%
PA	Lancaster	13	$325.77	$1,849.30	17.62%	13	$323.48	17.88%
PA	Lebanon	3	$69.80	$475.10	14.69%	3	$69.16	14.99%
PA	Perry	1	$20.77	$128.30	16.19%	1	$20.36	16.57%
PA	York	8	$222.93	$1,782.60	12.51%	8	$226.22	13.11%
PA Recap: 41 stores with sales of $959.55illion. Total retail food sales for PA in the study: $7.43 billion. Weis Markets share of PA is 12.92%.								
VA	Culpeper	1	$14.29	$193.00	7.40%	1	$14.23	7.59%
VA	Spotsylvania	5	$60.10	$879.60	6.83%	5	$59.99	6.76%
VA	Stafford	3	$36.38	$489.30	7.44%	3	$36.53	8.01%
VA Recap: 9 stores with sales of $110.77 million. Total retail food sales for VA in the study: $27.39 billion. Weis Markets share of VA is .040%.								

Mid-Atlantic Recap: 99 stores with sales of $2.1 billion annually. Mid-Atlantic retail food sales total: $63.0 billion.
Weis Markets Per Store Average: $21.25 million

Source: *Food World,* June 2025

Richmond Supermarket Leaders

- Kroger Maintains Narrow Lead
- Food Lion Grows Share
- Publix Up Slightly
- Wegmans Is Per-Store Avg. King
- No Store Growth Among Supers

Rank	Company	2025 Stores	2025 Sales (in millions)	% of 2025 Market	2024 Stores	2024 Sales (in millions)	% of 2024 Market
1	Kroger (Marketplace)	18	$709.70	32.45%	18	$691.50	32.49%
2	Food Lion	50	$685.80	31.35%	50	$663.60	31.18%
3	Publix	16	$271.10	12.39%	16	$263.30	12.37%
4	Wegmans	2	$137.50	6.29%	2	$136.00	6.39%
5	Aldi	13	$105.20	4.81%	13	$101.40	4.76%
6	International Markets	6	$60.10	2.75%	6	$59.40	2.79%
7	Amazon Groc. (Whole Foods)	2	$48.30	2.21%	2	$47.60	2.24%
8	The Fresh Market	4	$44.10	2.02%	4	$41.90	1.97%
9	Trader Joe’s	2	$43.60	1.99%	2	$42.70	2.01%
10	Lidl	5	$40.50	1.85%	5	$39.50	1.86%
		118	**$2,145.90**	**98.11%**	**118**	**$2,086.90**	**98.04%**

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 $2.19 billion.
Source: *Food World*, June 2025

Richmond Market Leaders

- Alts. Share Grows To 53.2%
- Strong Comps Extend WM Lead
- Wawa Opens 4 C-Stores
- Club Stores Combined Share: 7.2%
- Kroger, Food Lion Fighting For #2

Rank	Company	2025 Stores	2025 Sales (in millions)	% of 2025 Market	2024 Stores	2024 Sales (in millions)	% of 2024 Market
1	Walmart (SC/Neighborhood Mkt)	17	$812.80	17.05%	17	$778.10	16.85%
2	Kroger (Marketplace)	18	$709.70	14.88%	18	$691.50	14.97%
3	Food Lion	50	$685.80	14.38%	50	$663.60	14.37%
4	Wawa	35	$308.67	6.47%	31	$294.48	6.38%
5	CVS	57	$304.00	6.38%	57	$292.50	6.33%
6	Publix	16	$271.10	5.69%	16	$263.30	5.70%
7	7-Eleven	96	$260.00	5.45%	96	$252.20	5.46%
8	Walgreens	34	$216.40	4.54%	35	$218.70	4.74%
9	Target	12	$198.30	4.16%	12	$193.70	4.19%
10	Wegmans	2	$137.50	2.88%	2	$136.00	2.95%
11	BJ’s Wholesale Club	3	$136.10	2.85%	3	$132.60	2.87%
12	Aldi	13	$105.20	2.21%	13	$101.40	2.20%
13	Sam’s Club	3	$104.60	2.19%	3	$101.90	2.21%
14	Costco	2	$104.40	2.19%	2	$101.80	2.20%
15	Sheetz	18	$68.70	1.44%	18	$66.90	1.45%
16	International Markets	6	$60.10	1.26%	6	$59.40	1.29%
17	Amazon Groc. (Whole Foods)	2	$48.30	1.01%	2	$47.60	1.03%
18	Fas-Marts	26	$44.50	0.93%	26	$42.98	0.93%
19	The Fresh Market	4	$44.10	0.92%	4	$41.90	0.91%
20	Trader Joe’s	2	$43.60	0.91%	2	$42.70	0.92%
		416	**$4,663.87**	**97.81%**	**413**	**$4,523.26**	**97.69%**

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 $4.77 billion.** Source: *Food World*, June 2025

IN REVIEW: KROGER

State	County	2025 Stores	2025 Sales (in millions)	2025 County Food Sales	% of 2025 County Market	2024 Stores	2024 Sales (in millions)	% of 2024 County Market
VA	Albemarle	3	$153.20	$744.90	20.57%	3	$148.90	20.79%
VA	Chesapeake City (Marketplace)	3	$131.60	$997.70	13.19%	3	$132.10	13.43%
VA	Chesterfield (Marketplace)	7	$286.40	$1,762.40	16.25%	7	$277.40	16.21%
VA	Gloucester	1	$22.90	$138.10	16.58%	1	$22.60	16.18%
VA	Hampton/Newport News	1	$33.90	$1,334.10	2.54%	1	$33.40	2.54%
VA	Hanover (Marketplace)	2	$109.50	$544.50	20.11%	2	$106.90	20.12%
VA	Henrico (Marketplace)	9	$313.80	$2,103.60	14.92%	9	$307.20	15.15%
VA	Isle Of Wight	1	$24.80	$110.40	22.46%	1	$29.60	29.08%
VA	Portsmouth City (Marketplace)	1	$44.60	$305.80	14.58%	1	$43.90	14.70%
VA	Suffolk City (Marketplace)	2	$79.20	$354.10	22.37%	2	$77.90	22.58%
VA	Virginia Beach (Marketplace)	5	$158.70	$1,875.20	8.46%	5	$163.20	8.91%
VA	York	2	$45.70	$199.60	22.90%	2	$44.90	22.02%

VA Recap: 37 stores with sales of $1.4 billion. Total retail food sales for VA in the study: $27.39 billion. Retailer share of VA is 5.13%.

Mid-Atlantic Recap: 37 stores with sales of $1.4 billion annually. Mid-Atlantic retail food sales total: $63.0 billion.
Kroger Per Store Average: $37.95 million (Indicates another banner used by the company) Source: *Food World,* June 2025

Richmond-Norfolk Supermarket Leaders

- Food Lion Still Strongest
- Kroger Gains Are Marginal
- Aldi Comps Aid Share
- Publix Opens Two
- Gridlock Creates Flat HT Sales

Rank	Company	2025 Stores	2025 Sales (in millions)	% of 2025 Market	2024 Stores	2024 Sales (in millions)	% of 2024 Market
1	Food Lion	155	$2,189.20	37.91%	155	$2,145.60	37.29%
2	Kroger (Marketplace)	37	$1,404.30	24.32%	37	$1,388.00	24.12%
3	Harris Teeter	25	$649.80	11.25%	25	$656.90	11.42%
4	Publix	20	$339.40	5.88%	18	$293.80	5.11%
5	Aldi	33	$287.60	4.98%	33	$277.60	4.82%
6	Wegmans	4	$286.20	4.96%	4	$284.90	4.95%
7	Amazon Groc. (Whole Foods)	5	$158.60	2.75%	5	$154.90	2.69%
8	Trader Joe's	6	$125.10	2.17%	6	$122.60	2.13%
9	Lidl	15	$124.70	2.16%	15	$122.30	2.13%
10	The Fresh Market	9	$118.50	2.05%	9	$114.60	1.99%
		309	**$5,683.40**	**98.42%**	**307**	**$5,561.20**	**96.66%**

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 $ $5.77 billion.

Source: *Food World*, June 2025

Richmond-Norfolk Market Leaders

- Alternates Share Now 51.3%
- SuperCenters Boost WM Volume
- C-Stores Share Is 12.8%
- Drug Chains Still Closing Stores
- Wawa Opens 12 C-Stores

Rank	Company	2025 Stores	2025 Sales (in millions)	% of 2025 Market	2024 Stores	2024 Sales (in millions)	% of 2024 Market
1	Walmart (SC/Neighborhood Mkt)	53	$2,249.50	17.43%	53	$2,166.10	17.17%
2	Food Lion	155	$2,189.20	16.96%	155	$2,145.60	17.01%
3	Kroger (Marketplace)	37	$1,404.30	10.88%	37	$1,388.00	11.01%
4	7-Eleven	387	$1,000.60	7.75%	389	$963.00	7.64%
5	Harris Teeter	25	$649.80	5.03%	25	$656.90	5.21%
6	Wawa	80	$647.80	5.02%	68	$588.40	4.67%
7	CVS	117	$646.30	5.01%	118	$622.80	4.94%
8	Walgreens	83	$519.00	4.02%	86	$520.50	4.13%
9	Target	26	$402.60	3.12%	26	$395.40	3.14%
10	Publix	20	$339.40	2.63%	18	$293.80	2.33%
11	Sam's Club	8	$305.30	2.37%	8	$297.90	2.36%
12	Aldi	33	$287.60	2.23%	33	$277.60	2.20%
13	BJ's Wholesale Club	7	$287.40	2.23%	7	$280.10	2.22%
14	Wegmans	4	$286.20	2.22%	4	$284.90	2.26%
15	Costco	5	$246.80	1.91%	5	$240.40	1.91%
16	Military Commissaries	6	$197.98	1.53%	6	$180.80	1.43%
17	Amazon Groc. (Whole Foods)	5	$158.60	1.23%	5	$154.90	1.23%
18	Trader Joe's	6	$125.10	0.97%	6	$122.60	0.97%
19	Lidl	15	$124.70	0.97%	15	$122.30	0.97%
20	The Fresh Market	9	$118.50	0.92%	9	$114.60	0.91%
		1,081	**$12,186.68**	**94.42%**	**1,073**	**$11,816.60**	**93.69%**

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 $12.91 billion.**

Source: *Food World,* June 2025

GREAT BALLS OF FIRE

By Duke Winston

Retailers See Survival In Challenging Competitive Conditions As Small Victory

As I was trained, Big Duke spent a lot of times talking to store managers, district managers and some headquarters executives in Richmond and Hampton Roads over the past six months in order to get a better feel on how they assess the current state of their companies and the market overall.

Let's just say there wasn't a lot of optimism to be found – and for good reason as both metro areas experienced a continuation of fierce competition from a diversified group of brick-and-mortar operators as well as the ongoing growing presence of online purchasing.

The "gold rush" era of the 2010s in both the Richmond and Tidewater markets has long ended, and retailers have seen minimal change and limited growth opportunities for even the strongest merchants since 2019.

The wild card here is the economy – specifically what will be the impact from tariffs? How much will SNAP benefits be reduced? This all leads up to consumer cautiousness - trading down and budget cutting - a natural reaction before a potential recession.

So, it was another year of survival for most merchants – with a scant few retailers posting significantly better numbers.

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

***Walmart** – Another year of no new store activity (which should change in the next 24 months), but the "King of All Retailers" seemed unaffected. That's because five years ago, Walmart CEO Doug McMillon predicted that the Behemoth's price image would sustain them well during times of economic challenges. How right he was. Excellent same-store sales increases helped Walmart extend its share of market lead in Richmond and helped the big merchant close the gap against Tidewater market share leader Food Lion.*

***Kroger** – It's clear to Big Duke that Kroger's store conditions in both Richmond and Tidewater have slipped since COVID began in 2020. After years of cap-ex initiatives, that well seems to have dried up and other than the company's new Marketplace replacement store in Mechanicsville (delayed opening until next year), Kroger's lack of capital investment and declining morale have slowed its growth. Perhaps the failed merger with Albertsons proved to be a bigger distraction than we're led to believe. Don't get me wrong, Kroger is still a major player that operates many good stores – but they're not as good as they were a few years ago. Perhaps new Mid-Atlantic division president Kate Mora can instill more "squeeze" into the Kroger juice.*

See **GREAT BALLS** on page 96

Legislative Line

from page 54

simple format showing whether the food has "Low," "Med" or "High" levels of these nutrients. It complements the FDA's well-known, present Nutrition Facts label, which gives consumers more detailed information about the nutrients in their food on the back labels of products.

"The 60-day additional comment period extension allows adequate time for interested parties to submit comments while also not significantly delaying rulemaking on the important issues in the proposed rule," according to the FDA announcement. Comments on the proposed rule can be submitted electronically to http://www.regulations.gov.

The proposed rule, when finalized, would require most food manufacturers to add a Nutrition Info Box to the front of most packaged food products three years after the final rule's effective date.

SNAP Costs Shift To States

Republicans are still hell-bent on shifting some of the SNAP costs to the states. Many states are saying they cannot afford to foot the bill and that the needy will suffer as fewer food stamps are disbursed. Retailers can also anticipate that fewer food stamps will end up in their cash tills. Since SNAP was created in its current form 50 years ago, the federal government has paid the full cost of benefits and split administrative costs 50-50 with states. Republicans want to change that formula.

"If we want to make SNAP more efficient, we should pass a bipartisan farm bill, not cut benefits from families, veterans and seniors," said ranking House agriculture Democrat member Angie Craig. "The Republican proposal would not generate any cost savings – it would merely pass the buck from the federal government to the states and take food away from innocent people in the process." At press time, House Republicans were still assessing alternative ways to fund SNAP as there is no existing infrastructure for states to pay for SNAP benefits. And such a move would significantly strain state budgets or force states to pick and choose who to take food away from.

Food trade associations are not idly sitting 'round as they have mounted a major lobbying effort on the Hill to convince lawmakers that cutting SNAP benefits is not the way to go. FMI – the Food Industry Association and the National Grocer's Association are just two of the major trade groups lobbying this issue. Leslie Sarasin, FMI's president, said, "Improving SNAP's efficiency and integrity is a shared goal. But we must not confuse reform with rollback. Policymakers should focus on strengthening the program – simplifying access, promoting employment and training opportunities and prosecuting criminals who try to steal SNAP benefits from those who need them most." We will see how all this unfolds in the current tax bill legislation.

FDA Launches New Review Program To Keep Food Supply Safe

The FDA has taken a major new step to increase transparency and ensure the safety of chemicals in our food supply by launching a stronger, more systematic review process for food chemicals already on the market. Under the leadership of Health and Human Services Secretary Robert F. Kennedy Jr. and FDA Commissioner Martin Makary, the FDA will roll out several key actions over the coming months to include an evidence-based prioritization scheme for reviewing existing chemicals.

Until now, the FDA has conducted post-market chemical reviews on a case-by-case basis, often in response to citizen petitions or new scientific evidence. The new framework will be proactive, science-based, and built for long-term impact and is part of a larger initiative to improve food chemical oversight.

FDA Authorizes Natural Dyes

The FDA has approved three new natural food color additives - galdieria extract blue, calcium phosphate, and butterfly pea flower extract - for use in products like yogurt, beverages, pretzels, candies, and even ready-to-eat chicken, offering manufacturers more plant and mineral-based choices. The change is effective immediately and reflects the FDA's broader shift away from petroleum-based synthetic dyes.

HHS Secretary Kennedy said, "For too long, our food system has relied on synthetic, petroleum-based dyes that offer no nutritional value and pose unnecessary health risks. We are removing these dyes and approving safe, natural alternatives to protect families and support healthier choices."

Status Of Cultivated Meat Bans

According to *Meatingplace News*, Montana will become the fourth state in the U.S. where cultivated meat cannot be manufactured or commercialized after the state's governor Greg Gianforte signed legislation that effectively bans such products. Establishments such as retail food stores making or selling cultivated meat would also face suspended licenses. The law takes effect October 1, 2025.

Florida became the first state to pass such a ban in 2024, with Florida Governor Ron DeSantis signing the bill into law on May 1, 2025. Alabama followed with its own law shortly thereafter, while Mississippi's ban was made law in March. Indiana and Nebraska are expected to enact similar laws during their upcoming state legislative sessions. As I said once before in my commentary about bans of cultivated meat products, you think politicians in these states are scared about a little competition in the meat department?

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WASHINGTON, DC SHARE OF MARKET: 2025

DISTRICT OF COLUMBIA ($2.72 billion)

- Population 702,250
- # of Households 321,556
- Median Income $106,287
- Under age 18...................... 18.6%
- Over age 65........................ 13.1%

- Female 52.6%
- White 37.7%
- Black.................................. 44.4%
- Hispanic 12.0%
- Asian.................................... 4.9%

Rank	Company	Stores	Sales (in millions)	% of Market
1	CVS	45	$441.70	16.23%
2	Albertsons (Safeway)	12	$408.20	14.99%
3	Amazon Groc. (Whole Foods)	9	$378.40	13.90%
4	Giant Food	7	$306.20	11.25%
5	Harris Teeter	3	$173.40	6.37%
6	Trader Joe's	5	$163.20	5.99%
7	International Markets	12	$152.30	5.59%
8	Target	5	$106.30	3.90%
9	Wegmans	1	$93.70	3.44%
10	Walgreens	11	$88.70	3.26%
11	Costco	1	$76.70	2.82%
12	Streets Market	8	$64.90	2.38%
13	7-Eleven	28	$57.40	2.11%
14	Walmart (SuperCenter)	2	$54.30	1.99%
15	Aldi	2	$26.10	0.96%
16	Military Commissaries	1	$18.54	0.68%
17	MOM's Organic Market	1	$16.60	0.61%
18	Wawa	4	$16.20	0.60%
19	Lidl	2	$15.90	0.58%
		159	**$2,658.74**	**97.67%**

( ) Name in parentheses indicates another banner used by the company. Source: *Food World*, June 2025

PER STORE AVERAGES: 2025

Rank	Company	Stores	2025 Sales (in millions)	Per Store Avg. (in millions)
1	Wegmans	26	$2,426.20	$93.32
2	Costco*	30	$2,154.30	$71.81
3	The Giant Co. (Martin's)	63	$3,111.60	$49.39
4	Sam's Club*	26	$1,165.80	$44.84
5	Walmart (SC/Neighborhood Mkt)*	157	$6,561.20	$41.79
6	Giant Food	159	$6,504.10	$40.91
7	BJ's Wholesale Club*	30	$1,224.60	$40.82
8	Kroger (Marketplace)	37	$1,404.30	$37.95
9	Amazon Groc. (AF/Whole Foods)	45	$1,612.50	$35.83
10	Harris Teeter	78	$2,558.90	$32.81

( ) 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 2025

GREAT BALLS OF FIRE

from page 95

***Food Lion** – Steady as always, but consistency doesn't necessarily mean you can move the market share needle. Certainly, over the past five years the biggest Ahold Delhaize USA brand has improved its perishables offerings, particularly produce, and the Salisbury, NC-based chain has a loyal following. Big Duke wouldn't call Food Lion a discounter (as in its early halcyon days), but its pricing strategy is more aggressive than Publix and Kroger but no match for Walmart and Aldi. Once again, another solid performance for Food Lion.*

***Harris Teeter** – With another year of no new store activity, the "upscale" sister brand of Kroger lost market share in its two regional marketing areas, Tidewater and Charlottesville. Not opening new stores contributed to that slight decline, but HT's high retails and diminishing customer service have placed them in the "mushy" middle. In Tidewater and Charlottesville that translates to "no man's land" since Wegmans, Whole Foods and to some degree, Trader Joe's, are perceived to deliver better service and/or more differentiated offerings, while the Matthews, NC-based merchant isn't within hailing distance of Walmart's, Aldi's and Lidl's everyday pricing.*

***Publix** – The biggest mover in this year's survey due to its two new Tidewater area stores (Virginia Beach and Carrollton). That gives the nation's most profitable supermarket chain four stores in the Hampton Roads region with the possibility of at least one more location (Norfolk) down the road. Still, as Duke has said since Publix opened its first store in Richmond in 2017, the Lakeland, FL-based merchant could do better. Why not feature more regional products? Why not offer expanded perishables? And why such a small box (about 50,000 square feet)? The answer (which is much more obvious to the leadership team at Publix than it is to me): because the company believes it is more efficient (and clearly more profitable) to operate one general model (operationally and merchandising-wise) than it is to become more local and flexible. However, at the end of the day, Big Duke can't dismiss Publix's 95-year stellar track record.*

***Aldi** – For a retailer that opened no new stores this year, Aldi matched market leader Walmart for the best same-store sales gains in the Richmond-Norfolk market. For Aldi, it's all about execution – clean and well-stocked stores, an excellent private label supplier network, a comfortable shopping experience, and great pricing. While Aldi plans to open only a handful of stores in the Old Dominion in the next few years (as part an 800 new store expansion plan by 2027), the company is poised to grow its market share by adding new consumers (especially if the economy worsens) and gaining more business from its growing group of existing loyal shoppers. For Aldi, market disruption is the name of the game.*

IN CELEBRATION OF JUNE DAIRY MONTH, GIANT FOOD RECENTLY AWARDED MORE THAN $65,000 TO the Alliance for the Chesapeake Bay to implement sustainability practices on local dairy farms in the Chesapeake Bay area. Collected through a recent round-up campaign at Giant's stores, the funding will support work under the Giant Clean Water Partnership. Since 2022, Giant has donated more than $345,000 to the Alliance through round-up campaigns to support a more sustainable dairy supply chain. At the check presentation at Tulip Pond Farm in Union Bridge, MD owned by the Doody family were (front row) Rebecca Pfeffer, Maola Dairies; Heidi Hafker, Kimberly Rosse, Monica Simmons-Dolce and Chris Carrado, Giant Food; dairy farmer Carole Doody; Kate Fritz, Allliance; dairy farmer Cathleen Doody; Joanne Gohn, Maola Dairies; (back row) Joe Wood and Amanda Culp, Maola Dairies; Amit Nainani and Justin Dull, Giant Food; Kyle Tranter, Maola Dairies; Nathan Villiger and Tyler Watson, Alliance; John Hamm, Acosta; and Hannah Walmer, Maola Dairies.

Tidewater Supermarket Leaders

- Food Lion Remains #1
- HT Affected By Competition
- Publix Openings Impact Kroger
- Publix Debuts In Va. Bch., Carrollton
- Gridlock In Overstored Region

Rank	Company	2025 Stores	2025 Sales (in millions)	% of 2025 Market	2024 Stores	2024 Sales (in millions)	% of 2024 Market
1	Food Lion	81	$1,203.20	41.07%	81	$1,186.60	41.04%
2	Harris Teeter	22	$571.70	19.51%	22	$579.30	20.04%
3	Kroger (Marketplace)	16	$541.40	18.48%	16	$547.60	18.94%
4	Aldi	19	$172.80	5.90%	19	$167.10	5.78%
5	Lidl	9	$75.30	2.57%	9	$74.00	2.56%
6	The Fresh Market	5	$74.40	2.54%	5	$72.70	2.51%
7	Amazon Groc. (Whole Foods)	2	$72.10	2.46%	2	$69.60	2.41%
8	Wegmans	1	$71.60	2.44%	1	$73.10	2.53%
9	Publix	4	$68.30	2.33%	2	$30.50	1.05%
10	Trader Joe's	3	$57.70	1.97%	3	$56.70	1.96%
		162	**$2,908.50**	**99.28%**	**160**	**$2,857.20**	**98.83%**

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 $2.93 billion. Source: *Food World*, June 2025

Tidewater Market Leaders

- Alts. Share Now At Record 53.7%
- Food Lion Loves Tidewater
- Comps Aid Walmart Share
- Drug Chains Continue To Slide
- Commissaries Show Improvement

Rank	Company	2025 Stores	2025 Sales (in millions)	% of 2025 Market	2024 Stores	2024 Sales (in millions)	% of 2024 Market
1	Food Lion	81	$1,203.20	18.15%	81	$1,186.60	18.21%
2	Walmart (SC/Neighborhood Mkt)	29	$1,134.90	17.12%	29	$1,094.20	16.80%
3	7-Eleven	264	$663.10	10.00%	267	$641.20	9.84%
4	Harris Teeter	22	$571.70	8.62%	22	$579.30	8.89%
5	Kroger (Marketplace)	16	$541.40	8.17%	16	$547.60	8.41%
6	Wawa	40	$305.72	4.61%	37	$293.92	4.51%
7	CVS	47	$278.80	4.20%	47	$266.50	4.09%
8	Walgreens	42	$264.30	3.99%	43	$258.80	3.97%
9	Aldi	19	$172.80	2.61%	19	$167.10	2.57%
10	Sam's Club	4	$171.20	2.58%	4	$167.40	2.57%
11	Target	12	$171.10	2.58%	12	$169.00	2.59%
12	Military Commissaries	5	$166.10	2.51%	5	$152.50	2.34%
13	BJ's Wholesale Club	4	$151.30	2.28%	4	$147.50	2.26%
14	Costco	2	$97.30	1.47%	2	$94.90	1.46%
15	Rite Aid	21	$78.80	1.19%	25	$90.80	1.39%
16	Lidl	9	$75.30	1.14%	9	$74.00	1.14%
17	The Fresh Market	5	$74.40	1.12%	5	$72.70	1.12%
18	Amazon Groc. (Whole Foods)	2	$72.10	1.09%	2	$69.60	1.07%
19	Wegmans	1	$71.60	1.08%	1	$73.10	1.12%
20	Publix	4	$68.30	1.03%	2	$30.50	0.47%
		629	**$6,333.42**	**95.52%**	**632**	**$6,177.22**	**94.82%**

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 $6.63 billion.** Source: *Food World*, June 2025

IN REVIEW: ALDI

State	County	2025 Stores	2025 Sales (in millions)	2025 County Food Sales	% of 2025 County Market	2024 Stores	2024 Sales (in millions)	% of 2024 County Market
DC	Washington	2	$26.10	$2,722.30	0.96%	1	$13.90	0.52%
DC Recap: 2 stores with sales of $26.1 million. Total retail food sales for DC in the study: $2.72 billion. Aldi share of DC is 0.96%.								
DE	Kent	3	$26.40	$574.80	4.59%	3	$25.50	4.54%
DE	Sussex	3	$32.50	$1,114.60	2.92%	3	$30.80	2.86%
DE Recap: 6 stores with sales of $58.9 million. Total retail food sales for DE in the study: $1.69 billion. Aldi share of DE is 3.49%.								
MD	Anne Arundel	7	$68.80	$2,542.10	2.71%	7	$67.30	2.72%
MD	Baltimore City	4	$28.90	$1,520.40	1.90%	4	$28.20	1.80%
MD	Baltimore County	12	$88.40	$3,773.20	2.34%	11	$73.10	1.99%
MD	Caroline	1	$10.90	$111.60	9.77%	1	$10.60	10.15%
MD	Carroll	2	$17.30	$759.30	2.28%	2	$16.90	2.26%
MD	Cecil	1	$10.10	$326.20	3.10%	1	$9.70	3.00%
MD	Charles	2	$10.90	$640.50	1.70%	2	$10.50	1.68%
MD	Dorchester	1	$10.20	$72.00	14.17%	1	$9.60	13.41%
MD	Frederick	2	$22.80	$1,071.80	2.13%	2	$22.40	2.15%
MD	Harford	4	$23.50	$1,152.60	2.04%	4	$21.90	1.94%
MD	Howard	1	$12.50	$1,336.50	0.94%	1	$13.10	1.02%
MD	Montgomery	9	$91.40	$4,189.10	2.18%	8	$75.50	1.88%
MD	Prince George's	13	$129.70	$3,666.90	3.54%	13	$122.40	3.41%
MD	St. Mary's	1	$9.10	$400.30	2.27%	1	$8.80	2.17%
MD	Talbot	1	$9.50	$236.60	4.02%	1	$9.20	3.74%
MD	Washington	2	$15.60	$607.50	2.57%	2	$15.10	2.61%
MD	Wicomico	1	$12.30	$327.80	3.75%	1	$11.90	3.75%
MD	Worcester	1	$11.10	$258.70	4.29%	1	$10.70	4.20%
MD Recap: 65 stores with sales of $583.0 million. Total retail food sales for MD in the study: $23.76 billion. Aldi share of MD is 2.45%.								
PA	Cumberland	4	$39.80	$1,289.40	3.09%	4	$38.70	3.10%
PA	Dauphin	2	$17.50	$1,134.70	1.54%	2	$20.50	1.86%
PA	Franklin	2	$19.20	$535.70	3.58%	1	$8.30	1.77%
PA	Lancaster	4	$37.20	$1,849.30	2.01%	4	$35.70	1.97%
PA	Lebanon	1	$9.40	$475.10	1.98%	1	$7.90	1.71%
PA	York	3	$29.10	$1,782.60	1.63%	3	$27.80	1.61%
PA Recap: 16 stores with sales of $152.2 million. Total retail food sales for PA in the study: $7.43 billion. Aldi share of PA is 2.05%.								
VA	Albemarle	1	$9.60	$744.90	1.29%	1	$9.10	1.27%
VA	Chesapeake City	3	$20.30	$997.70	2.03%	3	$19.60	1.99%
VA	Chesterfield	6	$45.10	$1,762.40	2.56%	6	$44.00	2.57%
VA	Culpeper	1	$10.70	$193.00	5.54%	1	$10.20	5.44%
VA	Fairfax	14	$154.30	$6,356.60	2.43%	14	$146.10	2.39%
VA	Frederick	1	$9.60	$561.70	1.71%	1	$9.30	1.66%
VA	Gloucester	1	$11.90	$138.10	8.62%	1	$11.60	8.30%
VA	Hampton/Newport News	3	$27.10	$1,334.10	2.03%	3	$26.30	2.00%
VA	Hanover	1	$9.80	$544.50	1.80%	1	$9.40	1.77%
VA	Henrico	6	$50.30	$2,103.60	2.39%	6	$48.00	2.37%
VA	James City	1	$9.70	$439.20	2.21%	1	$9.10	2.03%
VA	Loudoun	4	$44.40	$1,750.60	2.54%	4	$43.50	2.59%
VA	Norfolk City	3	$26.50	$876.30	3.02%	3	$25.70	3.03%
VA	Portsmouth City	1	$9.90	$305.80	3.24%	1	$9.50	3.18%
VA	Prince William	6	$71.70	$2,222.30	3.23%	6	$68.20	3.14%
VA	Spotsylvania	3	$19.20	$879.60	2.18%	3	$18.60	2.10%
VA	Stafford	1	$9.60	$489.30	1.96%	1	$9.10	1.99%
VA	Suffolk City	1	$13.10	$354.10	3.70%	1	$12.50	3.62%
VA	Virginia Beach	6	$54.30	$1,875.20	2.90%	6	$52.80	2.88%
VA	Warren	1	$8.90	$177.20	5.02%	1	$8.60	4.96%
VA Recap: 64 stores with sales of $616.0 million. Total retail food sales for VA in the study: $27.39 billion. Aldi share of VA is 2.25%.								

Mid-Atlantic Recap: 153 stores with sales of $1.44 billion annually. Mid-Atlantic retail food sales total: $63.0 billion.
Aldi Per Store Average: $9.39 million

Source: *Food World,* June 2025

IN REVIEW: CVS

State	County	2025 Stores	2025 Sales (in millions)	2025 County Food Sales	% of 2025 County Market	2024 Stores	2024 Sales (in millions)	% of 2024 County Market
DC	Washington	45	$441.70	$2,722.30	16.23%	49	$453.10	17.02%
DC Recap: 45 stores with sales of $441.7 million. Total retail food sales for DC in the study: $2.74 billion. CVS share of DC is 16.23%.								
DE	Kent	3	$17.80	$574.80	3.10%	3	$17.40	3.10%
DE	Sussex	6	$33.30	$1,114.60	2.99%	6	$32.90	3.05%
DE Recap: 9 stores with sales of $51.1 million. Total retail food sales for DE in the study: $1.7 billion. CVS share of DE is 3.02%.								
MD	Anne Arundel	22	$127.20	$2,542.10	5.00%	22	$121.70	4.92%
MD	Baltimore City	13	$99.20	$1,520.40	6.52%	14	$90.10	5.75%
MD	Baltimore County	24	$153.90	$3,773.20	4.08%	25	$152.70	4.16%
MD	Calvert	3	$15.20	$449.80	3.38%	3	$14.80	3.41%
MD	Carroll	5	$28.40	$759.30	3.74%	5	$28.10	3.76%
MD	Cecil	1	$5.30	$326.20	1.62%	1	$5.20	1.61%
MD	Charles	7	$38.90	$640.50	6.07%	7	$38.10	6.10%
MD	Frederick	13	$74.90	$1,071.80	6.99%	13	$73.60	7.08%
MD	Harford	8	$37.40	$1,152.60	3.24%	8	$36.70	3.26%
MD	Howard	8	$41.70	$1,336.50	3.12%	8	$41.20	3.20%
MD	Montgomery	43	$471.60	$4,189.10	11.26%	43	$450.60	11.24%
MD	Prince George's	43	$276.80	$3,666.90	7.55%	44	$265.20	7.39%
MD	Queen Anne's	1	$3.90	$167.30	2.33%	1	$3.80	2.41%
MD	St. Mary's	6	$31.70	$400.30	7.92%	6	$27.00	6.65%
MD	Talbot	2	$8.40	$236.60	3.55%	2	$8.10	3.30%
MD	Washington	6	$21.70	$607.50	3.57%	6	$20.10	3.47%
MD	Wicomico	2	$8.40	$327.80	2.56%	2	$8.10	2.55%
MD	Worcester	3	$19.70	$258.70	7.61%	3	$19.30	7.58%
MD Recap: 210 stores with sales of $1.46 billion. Total retail food sales for MD in the study: $23.76 billion. CVS share of MD is 6.16%.								
PA	Adams	1	$5.80	$230.20	2.52%	1	$5.70	2.44%
PA	Cumberland	12	$58.20	$1,289.40	4.51%	12	$56.50	4.52%
PA	Dauphin	13	$69.20	$1,134.70	6.10%	13	$64.90	5.88%
PA	Franklin	5	$23.50	$535.70	4.39%	5	$23.00	4.91%
PA	Lancaster	22	$114.80	$1,849.30	6.21%	22	$110.60	6.11%
PA	Lebanon	5	$27.60	$475.10	5.81%	5	$23.60	5.12%
PA	York	12	$64.20	$1,782.60	3.60%	12	$60.90	3.53%
PA Recap: 70 stores with sales of $363.3 million. Total retail food sales for PA in the study: $7.43 billion. CVS share of PA is 4.89%.								
VA	Accomack	1	$5.10	$107.30	4.75%	1	$4.90	4.69%
VA	Albemarle	7	$30.50	$744.90	4.09%	8	$31.60	4.41%
VA	Arlington	17	$118.20	$1,036.60	11.40%	18	$115.30	11.10%
VA	Chesapeake City	6	$44.30	$997.70	4.44%	6	$43.90	4.46%
VA	Chesterfield	22	$117.20	$1,762.40	6.65%	22	$113.50	6.63%
VA	Culpeper	2	$7.80	$193.00	4.04%	2	$7.60	4.06%
VA	Dinwiddie	1	$5.90	$145.50	4.05%	1	$5.80	4.09%
VA	Fairfax	64	$365.70	$6,356.60	5.75%	64	$348.50	5.70%
VA	Fauquier	1	$4.60	$212.80	2.16%	1	$4.40	2.24%
VA	Frederick	4	$20.20	$561.70	3.60%	4	$16.00	2.85%
VA	Greene	1	$4.80	$17.90	26.82%	1	$4.70	26.70%
VA	Hampton/Newport News	8	$42.60	$1,334.10	3.19%	8	$39.30	2.99%
VA	Hanover	6	$34.60	$544.50	6.35%	6	$33.80	6.36%
VA	Henrico	27	$141.20	$2,103.60	6.71%	27	$134.50	6.63%
VA	Isle of Wight	2	$11.60	$110.40	10.51%	2	$11.30	11.10%
VA	James City	6	$32.90	$439.20	7.49%	6	$32.60	7.26%
VA	King George	1	$5.20	$109.60	4.74%	1	$5.00	4.88%
VA	Lancaster	1	$4.00	$78.40	5.10%	1	$3.90	4.34%

IN REVIEW: CVS

State	County	2025 Stores	2025 Sales (in millions)	2025 County Food Sales	% of 2025 County Market	2024 Stores	2024 Sales (in millions)	% of 2024 County Market
VA	Loudoun	12	$59.10	$1,750.60	3.38%	12	$57.20	3.41%
VA	Louisa	1	$6.40	$54.10	11.83%	1	$6.20	13.00%
VA	Norfolk City	7	$48.20	$876.30	5.50%	7	$46.70	5.51%
VA	Orange	2	$12.90	$153.80	8.39%	2	$12.60	8.23%
VA	Page	1	$5.30	$77.90	6.80%	1	$5.10	6.87%
VA	Portsmouth City	3	$17.00	$305.80	5.56%	3	$16.80	5.63%
VA	Powhatan	1	$5.10	$84.50	6.04%	1	$4.90	5.91%
VA	Prince George	1	$4.90	$97.10	5.05%	1	$4.80	5.83%
VA	Prince William	17	$89.30	$2,222.30	4.02%	17	$87.60	4.04%
VA	Shenandoah	1	$4.40	$129.80	3.39%	1	$4.30	3.45%
VA	Spotsylvania	12	$73.40	$879.60	8.34%	12	$69.30	7.81%
VA	Stafford	7	$35.20	$489.30	7.19%	7	$34.00	7.45%
VA	Suffolk City	1	$5.60	$354.10	1.58%	1	$5.50	1.59%
VA	Virginia Beach	13	$71.70	$1,875.20	3.82%	13	$65.70	3.59%
VA	Warren	2	$8.30	$177.20	4.68%	2	$8.10	4.67%
VA	York	1	$4.90	$199.60	2.45%	1	$4.70	2.31%

VA Recap: 259 stores with sales of $1.45 billion. Total retail food sales for VA in the study: $27.39 billion. CVS share of VA is 5.29%.

Mid-Atlantic Recap: 593 stores with sales of $7.77 billion annually. Mid-Atlantic retail food sales total: $63.0 billion.

CVS Per Store Average: $6.35 million

Source: *Food World,* June 2025

PEOPLE

JOH recently announced the promotion of **Tim McFadden** to director of headquarter sales.

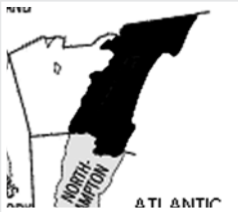
McFadden has three decades of experience and expertise in the food industry. He joined JOH in 2023 as an account manager in the center store division. Before this position, he served as an account executive for a sales and marketing agency, a supply chain manager and a senior category manager for a major Northeast customer. His new position will allow him to continue working closely with customers and clients while taking on expanded responsibilities in financial budgeting, planning and management within the division.

"Tim has played an important role in our team's success, always bringing a strong focus on growth and building meaningful relationships," said Ryan Tierney, EVP of center store, New England. "We're excited to see him take on this new leadership role and know he'll continue making a big impact. Congratulations, Tim!"

Tim McFadden

VIRGINIA COUNTY SHARE OF MARKET: 2025

Total sales for those Virginia counties included in this study are $27.39 billion



ACCOMACK COUNTY ($107.3 million) (Includes Chincoteague)

- Population 33,411
- # of Households 14,302
- Median Income $57,500
- Under 18 .... 20.3%
- Over 65 .... 26.8%
- Female 50.5%
- White 59.3%
- Black................................. 27.2%
- Hispanic 11.2%
- Asian.................................. 1.0%

Rank	Company	Stores	Sales (in millions)	% of Market
1	Walmart (SuperCenter)	1	$43.80	40.82%
2	Food Lion	2	$35.20	32.81%
3	Royal Farm Stores	5	$13.10	12.21%
4	Fas-Marts	3	$6.70	6.24%
5	Great Valu	1	$5.60	5.22%
6	CVS	1	$5.10	4.75%
		13	**$109.50**	**102.05%***

ALBEMARLE COUNTY Including CHARLOTTESVILLE ($744.9 million) (Includes, Keswick, White Hall)

- Population 162,080
- # of Households 34,763
- Median Income $85,996
- Under 18 .... 17.6%
- Over 65 .... 19.4%
- Female 51.7%
- White 71.3%
- Black................................. 13.4%
- Hispanic 6.1%
- Asian.................................. 6.7%

Rank	Company	Stores	Sales (in millions)	% of Market
1	Kroger	3	$153.20	20.57%
2	Harris Teeter	3	$78.10	10.48%
3	Wegmans	1	$77.10	10.35%
4	Food Lion	6	$70.70	9.49%
5	Costco	1	$45.10	6.05%
6	Walmart (SuperCenter)	1	$44.00	5.91%
7	Amazon Groc. (Whole Foods)	1	$38.20	5.13%
8	Giant Food	1	$37.50	5.03%
9	CVS	7	$30.50	4.09%
10	Sam's Club	1	$29.50	3.96%
11	7-Eleven	9	$25.60	3.44%
12	Trader Joe's	1	$23.80	3.20%
13	Wawa	3	$16.70	2.24%
14	Target	1	$16.40	2.20%
15	Fas-Marts	7	$14.20	1.91%
16	Great Valu	1	$9.70	1.30%
17	Aldi	1	$9.60	1.29%
18	Lidl	1	$8.90	1.19%
19	Walgreens	1	$5.60	0.75%
20	Sheetz	1	$5.50	0.74%
21	Rite Aid	1	$3.40	0.46%
		52	**$743.30**	**99.79%**

ARLINGTON COUNTY ($1.04 billion) (Includes Arlington)

- Population 239,807
- # of Households 111,530
- Median Income $146,160
- Under 18 .... 18.0%
- Over 65 .... 12.4%
- Female 49.7%
- White 59.4%
- Black................................. 10.7%
- Hispanic 16.0%
- Asian.................................. 11.3%

Rank	Company	Stores	Sales (in millions)	% of Market
1	Harris Teeter	6	$291.40	28.11%
2	CVS	17	$118.20	11.40%
3	Giant Food	3	$103.20	9.96%
4	Costco	1	$82.00	7.91%
5	Albertsons (Balducci's/Safeway)	4	$81.40	7.85%
6	7-Eleven	28	$76.50	7.38%
7	Amazon Groc. (Whole Foods)	2	$68.70	6.63%
8	Target	3	$62.80	6.06%
9	Military Commissaries	1	$40.59	3.92%
10	Trader Joe's	1	$37.20	3.59%
11	Walgreens	4	$32.10	3.10%
12	MOM's Organic Market	1	$16.50	1.59%
13	International Markets	1	$14.10	1.36%
14	Lidl	1	$9.70	0.94%
		73	**$1,034.39**	**99.79%**

CAROLINE COUNTY ($29.9 million) (Includes Bowling Green)

- Population 33,477
- # of Households 11,680
- Median Income $86,267
- Under 18 .... 22.8%
- Over 65 .... 17.4%
- Female 50.0%
- White 61.2%
- Black................................. 26.1%
- Hispanic 8.3%
- Asian.................................. 1.2%

Rank	Company	Stores	Sales (in millions)	% of Market
1	Food Lion	2	$18.40	61.54%
2	Sheetz	2	$10.50	35.12%
		4	**$28.90**	**96.66%**

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

- Population 6,564
- # of Households 2,947
- Median Income $70,339
- Under 18 .... 14.4%
- Over 65 .... 27.4%
- Female 50.4%
- White 45.7%
- Black................................. 42.0%
- Hispanic 2.3%
- Asian.................................. 0.6%

Multi-store retailers do not operate in this county.

See VIRGINIA COUNTY SHARE on page 103

VIRGINIA COUNTY SHARE OF MARKET: 2025

Continued from page 102

CHESAPEAKE CITY ($997.7 million)

- Population 254,997
- # of Households 92,361
- Median Income $94,189
- Under 18 .... 24.3%
- Over 65 .... 14.1%
- Female 50.9%
- White 54.4%
- Black 29.0%
- Hispanic 7.4%
- Asian 3.7%

1	Walmart (SC/Neighborhood Mkt)	6	$195.20	19.56%
2	Food Lion	12	$158.40	15.88%
3	Kroger (Marketplace)	3	$131.60	13.19%
4	7-Eleven	38	$101.50	10.17%
5	Sam's Club	2	$81.90	8.21%
6	Harris Teeter	3	$80.60	8.08%
7	Wawa	6	$50.84	5.10%
8	CVS	6	$44.30	4.44%
9	Target	3	$33.10	3.32%
10	BJ's Wholesale Club	1	$32.20	3.23%
11	Walgreens	6	$28.90	2.90%
12	Aldi	3	$20.30	2.03%
13	Rite Aid	4	$14.30	1.43%
14	Miller Marts	6	$10.50	1.05%
15	Lidl	1	$9.10	0.91%
16	Royal Farm Stores	1	$3.40	0.34%
		101	**$996.14**	**99.84%**

CHESTERFIELD COUNTY Includes COLONIAL HEIGHTS ($1.76 billion) (Inlcuding Chester, Midlothian)

- Population 408,467
- # of Households 144,541
- Median Income $849,900
- Under 18 .... 23.5%
- Over 65 .... 17.5%
- Female 53.7%
- White 62.1%
- Black 22.8%
- Hispanic 9.5%
- Asian 3.7%

1	Kroger (Marketplace)	7	$286.40	16.25%
2	Walmart (SC/Neighborhood Mkt)	6	$273.60	15.52%
3	Food Lion	17	$233.60	13.25%
4	Wawa	15	$137.48	7.80%
5	CVS	22	$117.20	6.65%
6	7-Eleven	29	$99.70	5.66%
7	Publix	5	$85.80	4.87%
8	Target	5	$70.80	4.02%
9	Wegmans	1	$67.80	3.85%
10	Walgreens	10	$65.80	3.73%
11	Sam's Club	2	$58.70	3.33%
12	Costco	1	$51.20	2.91%
13	BJ's Wholesale Club	1	$50.10	2.84%
14	Aldi	6	$45.10	2.56%
15	Sheetz	9	$32.40	1.84%
16	Trader Joe's	1	$22.80	1.29%
17	International Markets	3	$22.20	1.26%
18	The Fresh Market	2	$16.80	0.95%
19	Lidl	2	$15.60	0.89%
20	Rite Aid	2	$7.10	0.40%
21	Royal Farm Stores	1	$4.50	0.26%
22	Circle K	1	$2.50	0.14%
23	Dash-In	1	$2.50	0.14%
		149	**$1,769.68**	**100.41%***

CLARKE COUNTY ($12.3 million) (Includes Berryville, Boyce)

- Population 15,598
- # of Households 5,651
- Median Income $114,185
- Under 18 .... 19.2%
- Over 65 .... 23.6%
- Female 50.4%
- White 83.4%
- Black 4.2%
- Hispanic 8.4%
- Asian 1.6%

1	Sheetz	1	$4.60	37.40%
		1	**$4.60**	**37.40%**

CULPEPER COUNTY ($193.0 million) (Includes Culpeper, Rapidan)

- Population 56,125
- # of Households 18,584
- Median Income $96,098
- Under 18 .... 24.9%
- Over 65 .... 17.2%
- Female 49.9%
- White 66.3%
- Black 13.6%
- Hispanic 15.9%
- Asian 2.0%

1	The Giant Co. (Martin's)	1	$50.00	25.91%
2	Walmart (SuperCenter)	1	$37.70	19.53%
3	Albertsons (Safeway)	1	$16.90	8.76%
4	Target	1	$16.10	8.34%
5	7-Eleven	7	$15.80	8.19%
6	Weis Markets	1	$14.29	7.40%
7	Walgreens	2	$13.30	6.89%
8	Aldi	1	$10.70	5.54%
9	Lidl	1	$8.40	4.35%
10	CVS	2	$7.80	4.04%
		18	**$190.99**	**98.96%**

See VIRGINIA COUNTY SHARE on page 104

VIRGINIA COUNTY SHARE OF MARKET: 2025

Continued from page 103

CUMBERLAND COUNTY ($9.6 million) (Includes Cumberland)

- Population 10,062
- # of Households 4,175
- Median Income $57,057
- Under 18 .... 19.8%
- Over 65 .... 23.6%
- Female 51.4%
- White 64.5%
- Black.................................. 29.3%
- Hispanic 3.1%
- Asian................................... 0.6%

Multi-store retailers do not operate in this county.

DINWIDDIE COUNTY Including PETERSBURG ($145.5 million) (Includes Dinwiddie, Church Road)

- Population 62,634
- # of Households 25,281
- Median Income $64,972
- Under 18 .... 21.8%
- Over 65 .... 17.5%
- Female 52.6%
- White 38.9%
- Black.................................. 53.8%
- Hispanic 4.9%
- Asian................................... 1.0%

1	Walmart (SuperCenter)	1	$50.30	34.57%
2	Food Lion	4	$40.60	27.90%
3	Walgreens	4	$19.90	13.68%
4	Wawa	1	$7.19	4.94%
5	7-Eleven	2	$6.50	4.47%
6	International Markets	1	$6.20	4.26%
7	CVS	1	$5.90	4.05%
8	Sheetz	1	$4.90	3.37%
9	Fas-Marts	1	$2.40	1.65%
		16	**$143.89**	**98.89%**

ESSEX COUNTY ($79.9 million) (Includes Tappahannck)

- Population 10,683
- # of Households 4,396
- Median Income $56,481
- Under 18 .... 17.9%
- Over 65 .... 25.0%
- Female 52.2%
- White 54.5%
- Black.................................. 36.5%
- Hispanic 5.0%
- Asian................................... 1.0%

1	Walmart (SuperCenter)	1	$48.10	60.35%
2	Food Lion	1	$12.90	16.19%
3	Wawa	1	$5.85	7.34%
4	Walgreens	1	$5.60	7.03%
5	Sheetz	1	$3.90	4.89%
6	Fas-Marts	1	$2.20	2.76%
		6	**$78.55**	**98.56%**

FAIRFAX CO. Including FALLS CHURCH, FAIRFAX, ALEXANDRIA ($6.36 billion) (Includes McLean, Reston, Springfield)

- Population 1,361,401
- # of Households 503,223
- Median Income $148,734
- Under 18 .... 22.4%
- Over 65 .... 14.2%
- Female 57.6%
- White 11.7%
- Black.................................. 11.6%
- Hispanic 15.7%
- Asian................................. 12.1%

1	Giant Food	29	$1,076.50	16.94%
2	Albertsons (Balducci's/Safeway)	27	$702.30	11.05%
3	Wegmans	6	$642.50	10.11%
4	International Markets	34	$502.40	7.90%
5	Costco	4	$441.60	6.95%
6	Harris Teeter	10	$407.40	6.41%
7	Amazon Groc. (AF/Whole Foods)	11	$385.50	6.06%
8	CVS	64	$365.70	5.75%
9	Walmart (SuperCenter)	8	$285.20	4.49%
10	Target	10	$253.10	3.98%
11	7-Eleven	128	$251.70	3.96%
12	Trader Joe's	8	$247.40	3.89%
13	Aldi	14	$154.30	2.43%
14	BJ's Wholesale Club	3	$146.50	2.30%
15	Walgreens	18	$120.30	1.89%
16	Lidl	9	$93.10	1.46%
17	Military Commissaries	1	$76.83	1.21%
18	MOM's Organic Market	3	$56.10	0.88%
19	Shoppers	1	$32.50	0.51%
20	Food Lion	2	$32.40	0.51%
21	The Fresh Market	2	$26.70	0.42%
22	Sprouts	1	$20.60	0.32%
23	Wawa	3	$17.20	0.27%
24	Sheetz	2	$9.20	0.14%
25	ASG	1	$4.70	0.07%
26	Dash-In	1	$2.90	0.05%
		400	**$6,354.63**	**99.97%**

FAUQUIER COUNTY ($212.8 million) (Includes Remington, Warrenton)

- Population 75,865
- # of Households 26,266
- Median Income $129,495
- Under 18 .... 23.2%
- Over 65 .... 17.9%
- Female 50.1%
- White 74.9%
- Black.................................. 7.6%
- Hispanic 13.2%
- Asian................................... 2.0%

1	Walmart (SuperCenter)	1	$41.90	19.69%
2	Giant Food	1	$33.90	15.93%
3	Food Lion	3	$25.60	12.03%

See VIRGINIA COUNTY SHARE on page 105

VIRGINIA COUNTY SHARE OF MARKET: 2025

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4	7-Eleven	7	$23.50	11.04%
5	Albertsons (Safeway)	1	$22.10	10.39%
6	Harris Teeter	1	$20.50	9.63%
7	Sheetz	3	$13.60	6.39%
8	Walgreens	2	$11.40	5.36%
9	Wawa	2	$10.40	4.89%
10	CVS	1	$4.60	2.16%
11	Royal Farm Stores	1	$4.40	2.07%
		23	**$211.90**	**99.58%**

FREDERICK COUNTY ($561.7 million)
(Includes Winchester, Stephens City)

- Population 125,909
- # of Households 45,593
- Median Income $79,469
- Under 18 .... 22.3%
- Over 65 .... 18.2%
- Female 50.2%
- White 71.7%
- Black.................................. 8.3%
- Hispanic 15.6%
- Asian.................................. 2.5%

1	Walmart (SuperCenter)	3	$179.30	31.92%
2	The Giant Co. (Martin's)	3	$174.90	31.14%
3	Costco	1	$62.90	11.20%
4	Sheetz	7	$32.20	5.73%
5	Target	2	$29.40	5.23%
6	CVS	4	$20.20	3.60%
7	Sharp Shopper	1	$17.30	3.08%
8	7-Eleven	8	$14.50	2.58%
9	Walgreens	2	$11.50	2.05%
10	Aldi	1	$9.60	1.71%
11	Royal Farm Stores	1	$3.60	0.64%
12	Circle K	1	$2.10	0.37%
13	Wawa	1	$2.07	0.37%
		35	**$559.57**	**99.62%**

GLOUCESTER COUNTY ($138.1 million)
(Includes Gloucester)

- Population 40,154
- # of Households 15,111
- Median Income $83,689
- Under 18 .... 20.0%
- Over 65 .... 21.9%
- Female 50.5%
- White 84.0%
- Black.................................. 8.0%
- Hispanic 4.5%
- Asian.................................. 1.0%

1	Walmart (SuperCenter)	1	$42.50	30.77%
2	Food Lion	2	$24.30	17.60%
3	Kroger	1	$22.90	16.58%
4	7-Eleven	7	$15.60	11.30%
5	Aldi	1	$11.90	8.62%
6	Wawa	1	$9.17	6.64%
7	Walgreens	1	$6.20	4.49%
8	Rite Aid	1	$4.40	3.19%
		15	**$136.97**	**99.18%**

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

- Population 28,223
- # of Households 10,013
- Median Income $118,695
- Under 18 .... 16.4%
- Over 65 .... 26.3%
- Female 50.7%
- White 78.8%
- Black.................................. 13.7%
- Hispanic 3.9%
- Asian.................................. 1.9%

1	Food Lion	3	$37.70	74.80%
2	Wawa	1	$11.67	23.15%
		4	**$49.37**	**97.96%**

GREENE COUNTY ($17.9 million)
(Includes Stanardsville)

- Population 21,744
- # of Households 7,912
- Median Income $85,268
- Under 18 .... 22.9%
- Over 65 .... 19.5%
- Female 50.9%
- White 79.5%
- Black.................................. 7.9%
- Hispanic 7.7%
- Asian.................................. 2.3%

1	Food Lion	1	$11.10	62.01%
2	CVS	1	$4.80	26.82%
		2	**$15.90**	**88.83%**

HAMPTON/NEWPORT NEWS CITY ($1.33 billion)

- Population 320,652
- # of Households 133,538
- Median Income $67,233
- Under 18 .... 22.2%
- Over 65 .... 15.4%
- Female 51.6%
- White 38.0%
- Black.................................. 47.8%
- Hispanic 8.6%
- Asian.................................. 3.0%

1	Food Lion	16	$314.20	23.55%
2	Walmart (SC/Neighborhood Mkt)	5	$184.10	13.80%
3	7-Eleven	56	$145.40	10.90%
4	Military Commissaries	2	$70.71	5.30%
5	Wawa	7	$57.44	4.31%
6	Walgreens	7	$50.80	3.81%
7	Costco	1	$43.80	3.28%
8	Harris Teeter	2	$43.70	3.28%
9	CVS	8	$42.60	3.19%
10	BJ's Wholesale Club	1	$41.60	3.12%
11	Sam's Club	1	$41.10	3.08%
12	Kroger	1	$33.90	2.54%
13	Amazon Groc. (Whole Foods)	1	$33.30	2.50%
14	Target	2	$29.60	2.22%

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VIRGINIA COUNTY SHARE OF MARKET: 2025

Continued from page 105

15	Aldi	3	$27.10	2.03%
16	Lidl	2	$18.80	1.41%
17	Trader Joe's	1	$17.60	1.32%
18	The Fresh Market	1	$13.50	1.01%
19	International Markets	1	$12.90	0.97%
20	Rite Aid	3	$12.90	0.97%
21	Miller Marts	4	$9.00	0.67%
22	Royal Farm Stores	1	$3.80	0.28%
		126	**$1,247.85**	**93.53%**

HANOVER COUNTY ($544.5 million)
(Includes Ashland, Mechanicsville)

- Population 115,309
- # of Households 42,012
- Median Income $109,504
- Under 18 .... 21.4%
- Over 65 .... 19.7%
- Female 50.5%
- White 51.6%
- Black.................................... 9.5%
- Hispanic 4.1%
- Asian.................................... 2.7%

1	Walmart (SC/Neighborhood Mkt)	3	$124.70	22.90%
2	Kroger (Marketplace)	2	$109.50	20.11%
3	Food Lion	6	$78.40	14.40%
4	Wawa	5	$39.28	7.21%
5	BJ's Wholesale Club	1	$37.80	6.94%
6	CVS	6	$34.60	6.35%
7	7-Eleven	8	$24.20	4.44%
8	Target	1	$18.30	3.36%
9	Publix	1	$17.90	3.29%
10	Walgreens	3	$16.80	3.09%
11	Fas-Marts	7	$12.40	2.28%
12	Sheetz	3	$11.10	2.04%
13	Aldi	1	$9.80	1.80%
14	Dash-In	2	$5.60	1.03%
15	Circle K	1	$2.10	0.39%
		50	**$542.48**	**99.63%**

HENRICO COUNTY Including RICHMOND CITY ($2.10 billion)
(Includes Highland Springs, Sandston)

- Population 572,351
- # of Households 238,144
- Median Income $74,905
- Under 18 .... 21.6%
- Over 65 .... 17.5%
- Female 52.5%
- White 47.0%
- Black.................................. 37.6%
- Hispanic 7.4%
- Asian.................................... 6.3%

1	Walmart (SC/Neighborhood Mkt)	6	$319.90	15.21%
2	Kroger (Marketplace)	9	$313.80	14.92%
3	Food Lion	14	$216.50	10.29%
4	Publix	10	$167.40	7.96%
5	CVS	27	$141.20	6.71%
6	7-Eleven	56	$125.90	5.98%
7	Wawa	13	$113.05	5.37%
8	Target	6	$109.20	5.19%
9	Walgreens	15	$103.40	4.92%
10	Wegmans	1	$69.70	3.31%
11	Costco	1	$53.20	2.53%
12	Aldi	6	$50.30	2.39%
13	Amazon Groc. (Whole Foods)	2	$48.30	2.30%
14	BJ's Wholesale Club	1	$48.20	2.29%
15	Sam's Club	1	$45.90	2.18%
16	International Markets	2	$31.70	1.51%
17	The Fresh Market	2	$27.30	1.30%
18	Lidl	3	$24.90	1.18%
19	Fas-Marts	16	$23.80	1.13%
20	Trader Joe's	1	$20.80	0.99%
21	Sheetz	3	$11.70	0.56%
22	Save A Lot	2	$8.60	0.41%
23	Royal Farm Stores	2	$8.30	0.39%
24	Dash-In	2	$5.20	0.25%
25	Great Valu	1	$5.10	0.24%
26	Rite Aid	1	$4.70	0.22%
27	Miller Marts	1	$2.50	0.12%
		204	**$2,100.55**	**99.86%**

ISLE OF WIGHT COUNTY ($110.4 million)
(Includes Smithfield)

- Population 40,942
- # of Households 15,426
- Median Income $96,118
- Under 18 .... 21.4%
- Over 65 .... 20.4%
- Female 50.4%
- White 68.9%
- Black.................................. 23.0%
- Hispanic 4.6%
- Asian.................................... 1.2%

1	Food Lion	3	$35.80	32.43%
2	Kroger	1	$24.80	22.46%
3	Publix	1	$18.20	16.49%
4	CVS	2	$11.60	10.51%
5	7-Eleven	3	$9.70	8.79%
6	Royal Farm Stores	2	$7.10	6.43%
7	Rite Aid	1	$4.30	3.89%
8	Miller Marts	1	$2.30	2.08%
		14	**$113.80**	**103.08%***

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VIRGINIA COUNTY SHARE OF MARKET: 2025

Continued from page 106

JAMES CITY CO. Including WILLIAMSBURG ($439.2 million) (Includes Norge, Toano)

- Population 98,827
- # of Households 36,325
- Median Income $86,902
- Under 18 .... 19.5%
- Over 65 .... 27.2%
- Female 51.7%
- White 72.7%
- Black................................ 14.5%
- Hispanic 7.4%
- Asian.................................. 3.1%

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 ($6.2 million) (Includes King & Queen Courthouse)

- Population 6,747
- # of Households 2,814
- Median Income $72,851
- Under 18 .... 16.9%
- Over 65 .... 24.9%
- Female 49.6%
- White 67.2%
- Black................................ 23.9%
- Hispanic 3.6%
- Asian.................................. 0.5%

Multi-store retailers do not operate in this county.

KING GEORGE COUNTY ($109.6 million) (Includes King George)

- Population 28,816
- # of Households 9,877
- Median Income $110,517
- Under 18 .... 24.3%
- Over 65 .... 14.7%
- Female 49.2%
- White 70.9%
- Black................................ 16.4%
- Hispanic 7.3%
- Asian.................................. 1.9%

1	Walmart (SuperCenter)	1	$41.70	38.05%
2	Food Lion	2	$28.60	26.09%
3	Sheetz	3	$13.90	12.68%
4	Wawa	1	$7.45	6.80%
5	Fas-Marts	1	$5.30	4.84%
6	CVS	1	$5.20	4.74%
7	7-Eleven	2	$4.10	3.74%
8	Military Commissaries	1	$2.58	2.35%
		12	**$108.83**	**99.30%**

KING WILLIAM COUNTY ($41.3 million) (Includes West Point)

- Population 19,232
- # of Households 7,115
- Median Income $85,212
- Under 18 .... 22.8%
- Over 65 .... 17.2%
- Female 50.5%
- White 76.6%
- Black................................ 15.0%
- Hispanic 3.6%
- Asian.................................. 1.4%

1	Food Lion	2	$32.50	78.69%
2	7-Eleven	2	$5.00	12.11%
3	Fas-Marts	1	$2.60	6.30%
		5	**$40.10**	**97.09%**

LANCASTER COUNTY ($78.4 million) (Includes Kilmarnock)

- Population 11,062
- # of Households 5,468
- Median Income $67,169
- Under 18 .... 14.8%
- Over 65 .... 38.8%
- Female 52.6%
- White 68.5%
- Black................................ 27.1%
- Hispanic 2.1%
- Asian.................................. 0.9%

1	Walmart (SuperCenter)	1	$43.10	54.97%
2	Food Lion	1	$16.10	20.54%
3	Walgreens	1	$6.20	7.91%
4	CVS	1	$4.00	5.10%
5	7-Eleven	1	$3.10	3.95%
6	Fas-Marts	1	$2.60	3.32%
		6	**$75.10**	**95.79%**

LOUDOUN COUNTY ($1.75 billion) (Includes Ashburn, Leesburg, Sterling)

- Population 443,380
- # of Households 140,823
- Median Income $178,707
- Under 18 .... 26.1%
- Over 65 .... 11.4%
- Female 49.9%
- White 51.3%
- Black.................................. 8.4%
- Hispanic 14.2%
- Asian................................ 23.1%

1	Giant Food	8	$259.10	14.80%
2	Harris Teeter	9	$252.30	14.41%
3	Wegmans	2	$201.30	11.50%
4	Costco	2	$191.70	10.95%
5	Walmart (SuperCenter)	3	$143.50	8.20%
6	7-Eleven	36	$78.20	4.47%
7	International Markets	4	$74.20	4.24%
8	Target (Super Target)	3	$65.20	3.72%
9	Walgreens	11	$61.90	3.54%
10	Albertsons (Safeway)	4	$60.60	3.46%
11	CVS	12	$59.10	3.38%
12	Aldi	4	$44.40	2.54%

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VIRGINIA COUNTY SHARE OF MARKET: 2025

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13	Sam's Club	1	$42.70	2.44%
14	Food Lion	3	$41.80	2.39%
15	Trader Joe's	2	$41.70	2.38%
16	Amazon Groc. (Whole Foods)	1	$34.80	1.99%
17	Sheetz	7	$33.80	1.93%
18	Lidl	3	$24.80	1.42%
19	Sprouts	1	$16.60	0.95%
20	Wawa	2	$14.40	0.82%
21	Royal Farm Stores	2	$5.60	0.32%
22	Circle K	1	$2.20	0.13%
		121	**$1,749.90**	**99.96%**

LOUISA COUNTY ($54.1 million)
(Includes Louisa, Mineral)

- Population 42,109
- # of Households 15,211
- Median Income $80,343
- Under 18 .... 19.9%
- Over 65 .... 21.6%
- Female 50.2%
- White 77.4%
- Black................................. 14.7%
- Hispanic 4.4%
- Asian................................... 0.8%

1	Food Lion	2	$23.60	43.62%
2	Sheetz	2	$10.40	19.22%
3	CVS	1	$6.40	11.83%
4	7-Eleven	2	$6.10	11.28%
5	Walgreens	1	$5.80	10.72%
		8	**$52.30**	**96.67%**

MADISON COUNTY ($18.4 million)
(Includes Madison)

- Population 14,252
- # of Households 5,392
- Median Income $82,972
- Under 18 .... 19.7%
- Over 65 .... 23.8%
- Female 51.8%
- White 83.7%
- Black................................... 8.7%
- Hispanic 4.3%
- Asian................................... 0.9%

1	Food Lion	1	$15.10	82.07%
2	7-Eleven	1	$3.20	17.39%
		2	**$18.30**	**99.46%**

MATHEWS COUNTY ($15.5 million)
(Includes Mathews)

- Population 8,602
- # of Households 3,767
- Median Income $75,487
- Under 18 .... 15.8%
- Over 65 .... 32.6%
- Female 51.2%
- White 85.2%
- Black................................... 8.2%
- Hispanic 2.8%
- Asian................................... 0.9%

1	Food Lion	1	$15.30	98.71%
		1	**$15.30**	**98.71%**

MIDDLESEX COUNTY ($29.4 million)
(Includes Urbanna)

- Population 10,949
- # of Households 4,733
- Median Income $74,154
- Under 18 .... 16.2%
- Over 65 .... 34.0%
- Female 50.7%
- White 77.6%
- Black................................. 15.6%
- Hispanic 3.2%
- Asian................................... 0.6%

1	Food Lion	1	$15.50	52.72%
2	7-Eleven	4	$12.10	41.16%
		5	**$27.60**	**93.88%**

NEW KENT COUNTY ($71.8 million)
(Includes New Kent, Providence, Forge)

- Population 27,218
- # of Households 9,034
- Median Income $120,125
- Under 18 .... 19.5%
- Over 65 .... 18.9%
- Female 48.3%
- White 75.8%
- Black................................. 15.3%
- Hispanic 4.1%
- Asian................................... 1.3%

1	Food Lion	4	$53.70	74.79%
2	Walgreens	2	$10.50	14.62%
3	Fas-Marts	2	$5.90	8.22%
4	7-Eleven	1	$3.70	5.15%
		9	**$73.80**	**102.79%***

NORFOLK CITY ($876.3 million)

- Population 231,105
- # of Households 94,457
- Median Income $64,017
- Under 18 .... 50.2%
- Over 65 .... 12.6%
- Female 49.3%
- White 41.5%
- Black................................. 39.8%
- Hispanic 9.9%
- Asian................................... 3.7%

1	Walmart (SC/Neighborhood Mkt)	4	$188.70	21.53%
2	Food Lion	8	$149.60	17.07%
3	7-Eleven	40	$103.70	11.83%
4	Harris Teeter	3	$73.90	8.43%
5	Costco	1	$53.50	6.11%
6	CVS	7	$48.20	5.50%
7	Wawa	6	$45.15	5.15%
8	Walgreens	6	$44.30	5.06%
9	Military Commissaries	1	$33.96	3.88%
10	BJ's Wholesale Club	1	$32.40	3.70%
11	Aldi	3	$26.50	3.02%
12	The Fresh Market	1	$18.50	2.11%
13	Target	1	$15.20	1.73%
14	Lidl	1	$9.50	1.08%
15	Miller Marts	4	$8.60	0.98%
16	Royal Farm Stores	2	$7.50	0.86%

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VIRGINIA COUNTY SHARE OF MARKET: 2025

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17	Rite Aid	2	$7.10	0.81%
18	Save A Lot	1	$5.10	0.58%
		92	**$871.41**	**99.44%**

NORTHAMPTON COUNTY ($44.5 million)
(Includes Cape Charles, Exmore)

- Population 12,004
- # of Households 5,338
- Median Income $55,933
- Under 18 .... 18.0%
- Over 65 .... 30.7%
- Female 53.0%
- White 57.0%
- Black.................................. 30.7%
- Hispanic 9.5%
- Asian.................................... 1.1%

1	Food Lion	2	$23.20	52.13%
2	Fas-Marts	3	$8.90	20.00%
3	Royal Farm Stores	2	$6.50	14.61%
4	Walgreens	1	$5.30	11.91%
		8	**$43.90**	**98.65%**

NORTHUMBERLAND COUNTY ($22.9 million)
(Includes Heathsville)

- Population 12,397
- # of Households 5,436
- Median Income $69,500
- Under 18 .... 13.8%
- Over 65 .... 37.5%
- Female 50.5%
- White 69.8%
- Black.................................. 23.8%
- Hispanic 3.8%
- Asian.................................... 0.7%

1	Food Lion	1	$14.90	65.07%
2	Walgreens	1	$5.20	22.71%
3	Fas-Marts	1	$2.40	10.48%
		3	**$22.50**	**98.25%**

NOTTOWAY COUNTY ($42.9 million)
(Includes Crewe, Nottoway)

- Population 15,632
- # of Households 5,492
- Median Income $62,161
- Under 18 .... 19.7%
- Over 65 .... 18.7%
- Female 45.5%
- White 54.5%
- Black.................................. 38.1%
- Hispanic 4.9%
- Asian.................................... 0.9%

1	Walmart (SuperCenter)	1	$39.80	92.77%
2	Fas-Marts	1	$3.00	6.99%
		2	**$42.80**	**99.77%**

ORANGE COUNTY ($153.8 million)
(Includes Gordonsville, Orange)

- Population 38,986
- # of Households 14,667
- Median Income $94,175
- Under 18 .... 21.6%
- Over 65 .... 20.9%
- Female 51.2%
- White 75.5%
- Black.................................. 12.9%
- Hispanic 7.4%
- Asian.................................... 1.4%

1	Walmart (SuperCenter)	2	$77.10	50.13%
2	Food Lion	3	$31.60	20.55%
3	Target	1	$16.80	10.92%
4	CVS	2	$12.90	8.39%
5	Sheetz	2	$9.50	6.18%
6	7-Eleven	2	$4.90	3.19%
7	Fas-Marts	1	$2.80	1.82%
		13	**$155.60**	**101.17%***

PAGE COUNTY ($77.9 million)
(Includes Elgin, Luray)

- Population 23,686
- # of Households 9,509
- Median Income $59,396
- Under 18 .... 19.3%
- Over 65 .... 22.9%
- Female 50.1%
- White 92.4%
- Black.................................. 2.5%
- Hispanic 2.7%
- Asian.................................... 0.5%

1	Walmart (SuperCenter)	1	$47.80	61.36%
2	Food Lion	2	$12.40	15.92%
3	7-Eleven	3	$10.10	12.97%
4	CVS	1	$5.30	6.80%
		7	**$75.60**	**97.05%**

PORTSMOUTH CITY ($305.8 million)

- Population 96,482
- # of Households 39,678
- Median Income $58,972
- Under 18 .... 23.2%
- Over 65 .... 15.2%
- Female 52.0%
- White 35.9%
- Black.................................. 51.7%
- Hispanic 5.1%
- Asian.................................... 1.5%

1	Food Lion	5	$80.20	26.23%
2	Kroger (Marketplace)	1	$44.60	14.58%
3	Walmart (SuperCenter)	1	$35.90	11.74%
4	7-Eleven	14	$28.60	9.35%
5	Harris Teeter	1	$26.20	8.57%
6	Wawa	3	$19.02	6.22%
7	CVS	3	$17.00	5.56%
8	Military Commissaries	1	$14.71	4.81%
9	Walgreens	2	$13.20	4.32%
10	Aldi	1	$9.90	3.24%
11	Royal Farm Stores	2	$8.80	2.88%
12	Rite Aid	1	$4.40	1.44%
		35	**$302.53**	**98.93%**

See VIRGINIA COUNTY SHARE on page 110

VIRGINIA COUNTY SHARE OF MARKET: 2025

Continued from page 109

POWHATAN COUNTY ($84.5 million) (Includes Powhatan)

- Population 32,392
- # of Households 11,151
- Median Income $110,667
- Under 18 .... 18.5%
- Over 65 .... 20.6%
- Female 48.1%
- White 85.9%
- Black.................................. 8.5%
- Hispanic 3.1%
- Asian.................................. 0.7%

1	Walmart (SuperCenter)	1	$44.30	52.43%
2	Food Lion	2	$25.30	29.94%
3	Sheetz	2	$8.60	10.18%
4	CVS	1	$5.10	6.04%
		6	**$83.30**	**98.58%**

PRINCE GEORGE CO. Including HOPEWELL ($97.1 million) (Includes Prince George)

- Population 66,559
- # of Households 22,136
- Median Income $68,993
- Under 18 .... 22.3%
- Over 65 .... 14.9%
- Female 48.3%
- White 47.3%
- Black.................................. 39.0%
- Hispanic 9.5%
- Asian.................................. 1.8%

1	Military Commissaries	1	$31.88	32.83%
2	Food Lion	2	$23.20	23.89%
3	Wawa	1	$10.86	11.18%
4	7-Eleven	3	$8.80	9.06%
5	Walgreens	1	$5.10	5.25%
6	CVS	1	$4.90	5.05%
7	Rite Aid	2	$4.40	4.53%
8	Save A Lot	1	$4.20	4.33%
9	Sheetz	1	$3.60	3.71%
		13	**$96.94**	**99.84%**

PRINCE WILLIAM CO. Including MANASSAS, MANASSAS PK. ($2.22 billion) (Includes Dale City, Quantico, Woodbridge)

- Population 557,230
- # of Households 173,815
- Median Income $111,514
- Under 18 .... 25.0%
- Over 65 .... 10.9%
- Female 49.1%
- White 34.6%
- Black.................................. 17.6%
- Hispanic 36.7%
- Asian.................................. 9.8%

1	International Markets	12	$283.40	12.75%
2	Wegmans	2	$229.60	10.33%
3	Giant Food	8	$228.70	10.29%
4	7-Eleven	65	$187.40	8.43%
5	Food Lion	9	$148.50	6.68%
6	Walmart (SuperCenter)	5	$147.60	6.64%
7	Harris Teeter	4	$141.60	6.37%
8	Costco	2	$99.10	4.46%
9	Albertsons (Safeway)	4	$92.10	4.14%
10	CVS	17	$89.30	4.02%
11	Aldi	6	$71.70	3.23%
12	BJ's Wholesale Club	2	$68.90	3.10%
13	Target	4	$66.90	3.01%
14	Walgreens	9	$61.80	2.78%
15	Lidl	4	$54.20	2.44%
16	Wawa	8	$54.13	2.44%
17	Sheetz	11	$52.80	2.38%
18	Military Commissaries	1	$49.76	2.24%
19	Sam's Club	1	$35.10	1.58%
20	Shoppers	1	$28.50	1.28%
21	Sprouts	1	$15.80	0.71%
22	MOM's Organic Market	1	$13.90	0.63%
		177	**$2,220.79**	**99.93%**

RAPPAHANNOCK COUNTY ($5.5 million) (Includes Washington)

- Population 7,479
- # of Households 2,861
- Median Income $98,125
- Under 18 .... 15.7%
- Over 65 .... 29.6%
- Female 49.9%
- White 86.8%
- Black.................................. 4.1%
- Hispanic 5.1%
- Asian.................................. 1.4%

Multi-store retailers do not operate in this county.

RICHMOND COUNTY ($24.4 million) (Includes Elevon, Warsaw)

- Population 9,215
- # of Households 2,931
- Median Income $64,184
- Under 18 .... 18.3%
- Over 65 .... 22.0%
- Female 43.8%
- White 60.4%
- Black.................................. 29.1%
- Hispanic 7.7%
- Asian.................................. 0.7%

1	Food Lion	1	$15.00	61.48%
2	Walgreens	1	$4.80	19.67%
3	7-Eleven	1	$2.70	11.07%
		3	**$22.50**	**92.21%**

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

- Population 45,441
- # of Households 17,782
- Median Income $64,437
- Under 18 .... 21.1%
- Over 65 .... 22.3%
- Female 50.6%
- White 84.2%
- Black.................................. 3.6%
- Hispanic 9.6%
- Asian.................................. 1.2%

1	Food Lion	3	$45.70	35.21%
2	Walmart (SuperCenter)	1	$42.10	32.43%
3	7-Eleven	5	$10.90	8.40%

See VIRGINIA COUNTY SHARE on page 111

VIRGINIA COUNTY SHARE OF MARKET: 2025

Continued from page 110

4	Sheetz	2	$10.00	7.70%
5	Walgreens	2	$9.30	7.16%
6	Circle K	2	$5.30	4.08%
7	CVS	1	$4.40	3.39%
		16	**$127.70**	**98.38%**

SOUTHAMPTON COUNTY ($90.2 million)
(Includes Franklibn City, Courtland)

- Population 26,324
- # of Households 10,275
- Median Income $68,044
- Under 18 .... 18.3%
- Over 65 .... 23.7%
- Female 49.0%
- White 74.1%
- Black.................................. 20.7%
- Hispanic 3.0%
- Asian.................................. 0.5%

1	Walmart (SuperCenter)	1	$49.70	55.10%
2	Food Lion	2	$31.90	35.37%
3	7-Eleven	2	$5.00	5.54%
		5	**$86.60**	**96.01%**

SPOTSYLVANIA COUNTY Including FREDERICKSBURG ($879.6 million)
(Includes Spotsylvania)

- Population 183,013
- # of Households 62,732
- Median Income $96,231
- Under 18 .... 22.5%
- Over 65 .... 13.6%
- Female 51.6%
- White 59.7%
- Black.................................. 21.6%
- Hispanic 12.4%
- Asian.................................. 3.3%

1	Walmart (SuperCenter)	4	$181.70	20.66%
2	Giant Food	2	$94.60	10.75%
3	Wegmans	1	$77.30	8.79%
4	CVS	12	$73.40	8.34%
5	Wawa	10	$70.48	8.01%
6	Weis Markets	5	$60.10	6.83%
7	Costco	1	$38.60	4.39%
8	7-Eleven	15	$38.10	4.33%
9	Target	2	$35.90	4.08%
10	BJ's Wholesale Club	1	$34.80	3.96%
11	Publix	2	$33.50	3.81%
12	Sheetz	6	$22.90	2.60%
13	Lidl	2	$22.80	2.59%
14	Walgreens	3	$22.50	2.56%
15	Aldi	3	$19.20	2.18%
16	Royal Farm Stores	5	$18.30	2.08%
17	Fas-Marts	8	$13.10	1.49%
18	Food Lion	1	$13.10	1.49%
19	Miller Marts	1	$2.00	0.23%
		84	**$872.38**	**99.18%**

STAFFORD COUNTY ($489.3 million)
(Includes Aquia, Falmouth, Stafford)

- Population 168,919
- # of Households 51,309
- Median Income $133,792
- Under 18 .... 26.0%
- Over 65 .... 11.8%
- Female 49.4%
- White 53.0%
- Black.................................. 22.2%
- Hispanic 17.1%
- Asian.................................. 4.4%

1	Giant Food	3	$129.70	26.51%
2	Walmart (SuperCenter)	2	$75.60	15.45%
3	Wawa	8	$55.50	11.34%
4	7-Eleven	15	$43.30	8.85%
5	Target	2	$38.60	7.89%
6	Weis Markets	3	$36.38	7.44%
7	CVS	7	$35.20	7.19%
8	Shoppers	1	$26.20	5.35%
9	Publix	1	$17.50	3.58%
10	Sheetz	2	$11.70	2.39%
11	Aldi	1	$9.60	1.96%
12	Walgreens	1	$4.70	0.96%
13	Fas-Marts	1	$2.70	0.55%
		47	**$486.68**	**99.46%**

SUFFOLK CITY ($354.1 million)

- Population 103,105
- # of Households 37,133
- Median Income $90,089
- Under 18 .... 23.7%
- Over 65 .... 15.0%
- Female 51.3%
- White 46.5%
- Black.................................. 42.0%
- Hispanic 4.9%
- Asian.................................. 1.9%

1	Walmart (SuperCenter)	2	$85.00	24.00%
2	Kroger (Marketplace)	2	$79.20	22.37%
3	Food Lion	5	$52.80	14.91%
4	Harris Teeter	1	$29.10	8.22%
5	7-Eleven	10	$26.90	7.60%
6	Publix	1	$16.40	4.63%
7	Walgreens	3	$16.10	4.55%
8	Aldi	1	$13.10	3.70%
9	Wawa	2	$9.41	2.66%
10	Lidl	1	$9.20	2.60%
11	Rite Aid	2	$8.80	2.49%
12	CVS	1	$5.60	1.58%
13	Royal Farm Stores	1	$4.40	1.24%
14	Miller Marts	2	$4.20	1.19%
		34	**$360.21**	**101.73%***

See VIRGINIA COUNTY SHARE on page 112

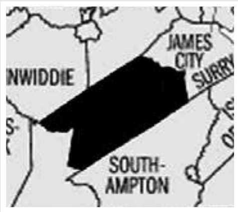
VIRGINIA COUNTY SHARE OF MARKET: 2025

Continued from page 111

SURRY COUNTY ($3.2 million)
(Includes Surry)

- Population 6,579
- # of Households 2,755
- Median Income $71,458
- Under 18 .... 17.2%
- Over 65 .... 26.2%
- Female 49.8%
- White 56.0%
- Black................................. 38.1%
- Hispanic 3.3%
- Asian.................................. 0.7%

1	7-Eleven	1	$2.50	78.13%
		1	**$2.50**	**78.13%**



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

- Population 10,753
- # of Households 3,705
- Median Income $62,821
- Under 18 .... 15.9%
- Over 65 .... 19.5%
- Female 42.1%
- White 41.7%
- Black................................. 53.1%
- Hispanic 3.7%
- Asian.................................. 0.6%

1	7-Eleven	2	$6.70	81.71%
		2	**$6.70**	**81.71%**

VIRGINIA BEACH CITY ($1.88 billion)

- Population 454,808
- # of Households 179,800
- Median Income $90,685
- Under 18 .... 22.1%
- Over 65 .... 15.4%
- Female 50.9%
- White 59.4%
- Black................................. 18.9%
- Hispanic 8.9%
- Asian.................................. 7.3%

1	Food Lion	21	$272.60	14.54%
2	Walmart (SC/Neighborhood Mkt)	7	$272.30	14.52%
3	Harris Teeter	9	$206.20	11.00%
4	7-Eleven	81	$195.50	10.43%
5	Kroger (Marketplace)	5	$158.70	8.46%
6	Walgreens	14	$84.20	4.49%
7	Wawa	10	$83.39	4.45%
8	CVS	13	$71.70	3.82%
9	Wegmans	1	$71.60	3.82%
10	Target	4	$65.90	3.51%
11	Aldi	6	$54.30	2.90%
12	Sam's Club	1	$48.20	2.57%
13	Military Commissaries	1	$46.72	2.49%
14	BJ's Wholesale Club	1	$45.10	2.41%
15	Amazon Groc. (Whole Foods)	1	$38.80	2.07%
16	International Markets	2	$30.90	1.65%
17	Lidl	4	$28.70	1.53%
18	The Fresh Market	2	$28.00	1.49%
19	Trader Joe's	1	$20.40	1.09%
20	Publix	1	$19.10	1.02%
21	Rite Aid	6	$18.20	0.97%
22	Miller Marts	7	$14.70	0.78%
23	Royal Farm Stores	2	$8.30	0.44%
		200	**$1,883.51**	**100.44%***

WARREN COUNTY ($177.2 million)
(Includes Front Royal)

- Population 42,461
- # of Households 15,357
- Median Income $84,331
- Under 18 .... 21.5%
- Over 65 .... 17.6%
- Female 49.2%
- White 82.4%
- Black................................... 5.5%
- Hispanic 7.9%
- Asian.................................. 1.5%

1	The Giant Co. (Martin's)	1	$67.10	37.87%
2	Walmart (SuperCenter)	1	$48.90	27.60%
3	Target	1	$18.20	10.27%
4	7-Eleven	7	$12.90	7.28%
5	Aldi	1	$8.90	5.02%
6	CVS	2	$8.30	4.68%
7	Sheetz	1	$6.10	3.44%
8	Royal Farm Stores	1	$2.80	1.58%
9	Circle K	1	$2.10	1.19%
		16	**$175.30**	**98.93%**

WESTMORELAND COUNTY ($54.5 million)
(Includes Colonial Beach)

- Population 19,235
- # of Households 8,029
- Median Income $59,766
- Under 18 .... 17.9%
- Over 65 .... 28.1%
- Female 50.6%
- White 64.3%
- Black................................. 25.1%
- Hispanic 6.6%
- Asian.................................. 0.9%

1	Food Lion	2	$28.40	52.11%
2	Walgreens	2	$9.70	17.80%
3	Great Valu	1	$6.50	11.93%

See VIRGINIA COUNTY SHARE on page 113

from page 76

Primary Supplier: Davenport
FW Stores: 26
FW Vol.: $53.8 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: 266
FW Vol.: $852.7 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.: $166.3 million

Sheetz, Inc.

243 Sheetz Way
Claysburg, PA 16625
Phone: (800) 765-4686
Web: sheetz.com
Exec. Vice Chmn.: Joe Sheetz
CEO/Pres.: Travis Sheetz
Primary Supplier: Direct
FW Stores: 167
FW Vol.: $720.2 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: 114
FW Vol.: $192.1 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: 210
FW Vol.: $1.58 billion

WHOLESALE CLUBS

BJ's Wholesale Club

350 Campus Dr.
Westborough, MA 01752
Phone: (774) 512-7400
Web: bjs.com
CEO/Chmn.: Robert W. Eddy
FW Stores: 30
FW Vol.: $1.22 billion

Costco

Northeast Div.
45940 Horseshoe Dr., Ste. 150
Sterling, VA 20166
Phone: (703) 406-6800
Pres./CEO: Ron Vachris
EVP/CFO: Gary Millerchip
Northeast Div. SVP/GM: Adam Self
FW Stores: 30
FW Vol: $2.15 billion

Sam's Club

2010 SE Simple Savings Dr.
Bentonville, AR 72716
Phone: (479) 273-4000
Web: samsclub.com
CEO/Pres.: Chris Nicholas
FW Stores: 26
FW Vol: $1.66 billion

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.: $2.20 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: 157 (includes Super-Center/Neighborhood Mkt.)
FW Vol.: $6.56 billion (grocery/HBC only)

VIRGINIA COUNTY SHARE OF MARKET: 2025

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4	7-Eleven	2	$6.40	11.74%
5	Fas-Marts	1	$2.50	4.59%
		8	**$53.50**	**98.17%**

YORK COUNTY Including POQUOSON ($199.6 million) (Includes Yorktown)

- Population 71,410
- # of Households 26,445
- Median Income $108,326
- Under 18 .... 22.7%
- Over 65 .... 18.4%
- Female 50.3%
- White 67.5%
- Black 14.6%
- Hispanic 8.1%
- Asian 6.6%

1	Food Lion	4	$51.40	25.75%
2	Walmart (SuperCenter)	1	$48.10	24.10%
3	Kroger	2	$45.70	22.90%
4	Wawa	2	$18.00	9.02%
5	Walgreens	2	$13.00	6.51%
6	7-Eleven	3	$8.90	4.46%
7	CVS	1	$4.90	2.45%
8	Rite Aid	1	$4.40	2.20%
9	Royal Farm Stores	1	$3.50	1.75%
		17	**$197.90**	**99.15%**

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

Source: *Food World*, June 2025

MARYLAND COUNTY SHARE OF MARKET: 2025

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12	Walgreens	1	$5.50	2.32%
13	High's	2	$3.90	1.65%
14	Rite Aid	1	$3.20	1.35%
15	7-Eleven	1	$2.80	1.18%
16	Fas-Marts	1	$2.30	0.97%
		19	**$234.53**	**99.13%**

WASHINGTON COUNTY ($607.5 million)
(Includes Fountainhead, Hagerstown, Hancock)

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

1	The Giant Co. (Martin's)	4	$188.20	30.98%
2	Walmart (SuperCenter)	2	$132.40	21.79%
3	Weis Markets	3	$74.44	12.25%
4	Sam's Club	1	$43.90	7.23%
5	Sheetz	8	$33.20	5.47%
6	Walgreens	5	$27.90	4.59%
7	CVS	6	$21.70	3.57%
8	Aldi	2	$15.60	2.57%
9	Target	1	$15.40	2.53%
10	Save A Lot	2	$13.60	2.24%
11	Food Lion	1	$11.70	1.93%
12	Lidl	1	$8.60	1.42%
13	Grocery Outlet	1	$6.60	1.09%
14	High's	2	$4.60	0.76%
15	Royal Farm Stores	1	$4.40	0.72%
16	7-Eleven	1	$2.90	0.48%
		41	**$605.14**	**99.61%**

WICOMICO COUNTY ($327.8 million)
(Includes Fruitland, Salisbury)

- Population 106,329
- # of Households 40,034
- Median Income $72,861
- Under 18 .... 22.4%
- Over 65 .... 17.2%
- Female 52.4%
- White 59.2%
- Black.................................. 28.0%
- Hispanic 7.2%
- Asian................................... 3.3%

1	Walmart (SuperCenter)	2	$86.20	26.30%
2	Albertsons (Acme)	1	$42.30	12.90%
3	Food Lion	4	$40.40	12.32%
4	Sam's Club	1	$40.00	12.20%
5	Royal Farm Stores	8	$22.90	6.99%
6	Target	1	$15.90	4.85%
7	Aldi	1	$12.30	3.75%
8	Wawa	2	$11.88	3.62%
9	Walgreens	2	$11.40	3.48%
10	7-Eleven	3	$9.60	2.93%
11	CVS	2	$8.40	2.56%
12	Rite Aid	2	$8.10	2.47%
13	Fas-Marts	4	$4.80	1.46%
14	Save A Lot	1	$4.40	1.34%
15	Grocery Outlet	1	$4.20	1.28%
16	Dash-In	1	$2.70	0.82%
		36	**$325.48**	**99.29%**

WORCESTER COUNTY ($258.7 million)
(Includes Ocean City, Pocomoke City, Snow Hill)

- Population 54,337
- # of Households 23,827
- Median Income $81,455
- Under 18 .... 17.1%
- Over 65 .... 29.3%
- Female 51.2%
- White 79.9%
- Black.................................. 12.6%
- Hispanic 4.0%
- Asian................................... 1.7%

1	Walmart (SuperCenter)	2	$89.40	34.56%
2	Food Lion	4	$63.10	24.39%
3	CVS	3	$19.70	7.61%
4	Albertsons (Acme)	1	$19.40	7.50%
5	7-Eleven	7	$17.50	6.76%
6	Wawa	2	$12.95	5.01%
7	Aldi	1	$11.10	4.29%
8	Rite Aid	3	$10.30	3.98%
9	Royal Farm Stores	3	$9.10	3.52%
10	Walgreens	1	$7.40	2.86%
11	Fas-Marts	1	$2.60	1.01%
		28	**$262.55**	**101.49%***

( ) 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 2025

TAKING STOCK

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recently retired from the grocery biz after serving as president of Acme Markets and Kings Food Markets. I knew Bob for many years and his kindness and generosity towards others was what made him special. A line is his published obituary really stood out: "...he was a humble man who provided a steady presence, always offering unwavering love, support and wisdom. In addition to Judy, he is survived by his son Rob and daughter in law Hayley and grandchild Sloane...three supreme musical talents also left us in the past month – one underrated, one dynamic and one an all-time great. The underrated - that would be Rick Derringer, 77, leader of the group The McCoys ("Hang on Sloopy" - 1965), band member and producer of The Edgar Winter Group and hit solo artist ("Rock and Roll Hootchie Koo" - 1973). However, I most admired Derringer for his guitar work. He played on studio sessions for artists as diverse as Tood Rundgren, Kiss and even Barbra Streisand. My favorite Derringer studio work was done on multiple Steely Dan albums. If you want to hear a great solo performance, listen to Derringer's slide work on "Show Biz Kids" (from the 1973 album "Countdown To Ecstasy"). Now for the dynamo: Sylvester "Sly" Stone, 82, who led one of the funkiest R&B bands in history - Sly & The Family Stone - from the mid-1960s to the mid-1970s. "The "family" was comprised of multi-cultural and multi-ethnic singers, dancers and top-flight musicians (bassist Larry Graham is in my top five all-time). Together, they energized audiences while recording such popular songs like "Everyday People;" I Want to Take You Higher;" "Dance to the Music;" "Family Affair;" "Hot Fun in the Summertime;" and "Thank You (Falettinme Be Mice Elf Agin)." Unfortunately, heavy drug use took its toll and for the majority of the last 30 years Sly lived mostly as a recluse. He and the band were inducted into the Rock & Roll Hall of Fame in 1993. As for the iconic, look no further than Brian Wilson, 82, leader of The Beach Boys. Sure, he penned such classic hits as "I Get Around," "Help Me, Rhonda:" and "Good Vibrations" (and more than a dozen others), but it was Wilson's phenomenal musical "ear" and drive for perfection that made him leaps and bounds better than just about any other popular legend. It all came together in 1966 when he created an album - "Pet Sounds" - built on the band's great harmonies, with unique sounds and beautiful songs (is there a better pop/rock tune than "God Only Knows?"). Both John Lennon and Paul McCartney said part of their inspiration to write and record "Sgt. Pepper's Lonely Hearts Club Band" (1967) emerged from hearing "Pet Sounds." Much like "Sly" Stone, Brian Wilson's career virtually ended for a 25-year period because of drugs and severe depression (the movie "Love & Mercy" - 2014 - does a pretty good job of depicting Wilson's demons and destructive lifestyle). Remarkably, Wilson returned to the stage in the mid-90s as a solo artist who finally got to perform the many great songs he wrote in the way he intended. A salute by a musical peer (you can easily guess who) summarizes his great career: "Brian Wilson was the most musically inventive voice in all of pop, with an otherworldly ear for harmony. He was also the visionary leader of America's greatest band, The Beach Boys. If there'd been no Beach Boys, there would have been no "Racing In The Street." Listen to "Summer's Gone" from The Beach Boys' last album "That's Why God Made The Radio" and weep. Farewell, Maestro. Nothing but love and a lovely lasting debt from all of us over here on E Street."

Rite Aid In Full Liquidation Mode With Likely Sept. End

from page 1

has already begun to liquidate its operations, dealing stores and selling prescription lists to other retailers. At the time of the bankruptcy filing, Rite Aid operated 1,245 stores in 15 states.

According to Matt Schroeder, Rite Aid's ninth and final CEO, "A key priority for Rite Aid is to ensure that as many of our loyal customers as possible continue to receive the pharmacy services and care they require without interruption. These agreements ensure our pharmacy customers will experience a smooth transition while preserving jobs for some of our valued team members."

Stores have already begun closing and at presstime, six major retailers (and competitors) - CVS, Albertsons, Walgreens, Giant Eagle, Weis Markets and Kroger - have acquired prescription lists at slightly more than 1,000 Rite Aid stores. As of June 20, more than 700 Rite Aid stores have closed or have been slated to close in the next two months.

Since Rite Aid is operating under the umbrella of the U.S. Bankruptcy Court in Trenton, NJ, each deal must be approved separately.

CVS has been the most active buyer to date, acquiring prescription lists for about 625 Rite Aid stores nationally as well as agreeing to purchase 64 Rite Aid locations in Idaho, Oregon and Washington.

At presstime, the number of prescription files sold to Albertsons, Walgreens and Kroger has not been disclosed. Pittsburgh-based Giant Eagle acknowledged it has acquired 78 prescription files from Rite Aid locations in Western PA and Ohio. Weis stated it has purchased 11 prescription lists from Rite Aid stores in Pennsylvania and New York. It is expected that other retailers will buy files as well as stores.

Even though it's only been eight months since Rite Aid emerged from its October 2023 bankruptcy, survival was a major concern for the company when that filing was made and the drug chain said it would seek to reorganize (it had lost $750 million in 2022).

During that process, Rite Aid closed approximately 800 stores nationally, reduced its debt by about $2 billion, sold its pharmacy benefit firm, Elixir, to MedImpact Healthcare Systems, and settled hundreds of opioid-related lawsuits.

However, the drug chain still held a $2.5 billion debt and was owned by its bondholders. Even after that restart, the momentum never came back.

The ending is a sad evolution for a company that once operated more than 5,000 stores and employed a workforce that exceeded 110,000 associates.

From that single store in Scranton, Alex Grass rapidly expanded his operation, changing the name to Rite Aid in the mid-1960s and going public in 1968. At that point, Rite Aid began to grow nationally, primarily by acquiring nearly a dozen regional drug chains.

When Alex Grass stepped down as CEO in 1995, his son Martin assumed the helm. He continued his father's expansion effort, acquiring Thrifty PayLess, which operated more than 1,000 drug stores in the West.

It wasn't long before two factors took a toll on Rite Aid – over-expansion and the corruption of Martin Grass. By the late 1990s the company's stock value had dropped precipitously, and the younger Grass was accused of financial misconduct which included falsifying financial statements. He resigned under pressure in 1999 and ultimately served a six-year prison sentence.

When former Albertsons and Yucaipa Cos. executive Bob Miller was named chief executive in 1999, he immediately ordered a restructuring of the organization which included closing hundreds of stores and financing the retailer's debt. He also created a stable operating environment, an important factor in Rite Aid's improvement.

Miller remained CEO until 2003 when another former Yucaipa Cos. leader, Mary Sammons, was named to lead the chain. It was under her leadership that Rite Aid made its biggest acquisition ever – the $3.4 billion purchase of Brooks and Eckerd drug stores which operated about 1,800 locations. However, the debt burden and the closure of overlapping stores caused Rite Aid's shares into freefall, and they lost 75 percent of their value between 2007 and 2008.

When yet another former Yucaipa Cos. executive, John Standley, became CEO in 2010, Rite Aid continued its failing ways. For most of his nearly nine-year tenure, Standley struggled to keep Rite Aid's sales and earnings positive, but did help engineer two potential moves that could have helped Rite Aid find a more secure future. The first was in 2015, when Walgreens attempted to acquire its competitor for $9.4 billion. However, the deal was thwarted by regulatory pushback. Instead, Walgreens purchased about 40 percent of the company's store network (1,932 units) for $4.38 billion. With the store base now severely diluted, Rite Aid's road became even more difficult financially. In 2018, Standley again tried to engineer a deal to strengthen his ailing company – this time by trying to merge Rite Aid with grocery chain Albertsons. However, Rite Aid's shareholders rejected the deal, which was subsequently cancelled. Also, during Standley's reign Rite Aid acquired pharmacy benefit management firm (PBM) Envision Rx in 2015 for $2 billion, which helped to diversify the company's portfolio. The name of that company was changed to Elixir in 2020.

Next up for the beleaguered firm was Heyward Donigan who was named Rite Aid's chief executive in 2019. Donigan had spent most of her career in the healthcare industry and she prioritized upgrading the company's technology and also expanded Rite Aid's healthcare programs. However, the impact of COVID brought difficult challenges as sales and earnings continued to decline. Donigan abruptly resigned in January 2023 to be replaced on an interim basis by board member Elizabeth "Busy" Burr, another former healthcare executive. It was Burr, during her 10-month tenure, who shaped the company's move towards bankruptcy.

When that initial filing was made in October 2023, investor and turnaround specialist Jeffrey Stein was named CEO and chief restructuring officer. For his 13-month tenure to lead Rite Aid out of bankruptcy Stein collected $20 million in compensation and bonuses.

When the "new" Rite Aid emerged in September, Matt Schroeder, the 25-year Rite Aid veteran who had most recently served as executive VP-chief financial officer, was appointed as CEO of the chain.

After nine months of trying to survive by closing hundreds of additional stores and tightening other administrative functions, Rite Aid was rapidly burning through its available cash. On May 5, the company pulled the plug, effectively ending a 63-year history begun by an ambitious entrepreneur.


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