Food World

WWW.FOODTRADENEWS.COM

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TAKING STOCK

by Jeff Metzger

For Retailers, The New Normal Brings Harsh Realities And Many Unknowns

As retailers in all channels adapt to the evolving new normal (including fewer shopping trips, heavier emphasis on core items and huge online shopping growth), it almost seems as though the world as we knew it stopped around March 1 and we're all focused on what's taken place in the last 120 days and what further changes retailers and suppliers are going to have to make going forward.

In reality, the fundamentals of retailing still apply – if you've got well-stocked, clean stores and properly trained associates you'll likely remain relevant. If you're also strong in perishables, offer superior pricing or can clearly differentiate yourself from the competition, you'll likely be successful.

Clearly, those retailers that had built an e-commerce infrastructure have

See **TAKING STOCK** on page 6

Most All Retailers' Revenues Boosted By COVID-19 Buying Patterns

Giant Extends Lead; Walmart, CVS Gain Sales In $50B Market

As one retail executive said, "We've never seen sales like this over the past 50 years, but somehow it doesn't remotely feel like a time to celebrate."

So devastating have been the effects of the COVID-19 pandemic, in which more than 2 million people have tested positive in the U.S. resulting in more than 118,000 deaths, that despite record sales during the month of March, most retailers took little joy in their revenue and earnings gains.

What they did do was hunker down and perform at a very high level during the most challenging time of our lives. Keeping stores open and clean, and working hard to maintain adequate supply chains were dauting tasks that retailers and manufacturers sacrificed to preserve. Simply said, this was customer service at its finest.

And in the 42 years that *Food World* has published its annual retail market study, never has there been a more unusual scenario for retailers. For 11 of the 12 months of our measuring period (April 1, 2019-March 31, 2020) retailers were having a marginally good year when viewed over a five-year period.

Same store sales during the April-February period typically ranged from positive 0.5 percent to 1.5 percent, with partial help coming from slight inflation. Events changed dramatically beginning in early March as the coronavirus started to rapidly spread and most states began issuing "stay at home" mandates. Essential business such as food stores remained open and panic buying quickly ensued. Many retailers said that for a two-week period in mid-March, their sales had more than doubled.

So, what did that do to our numbers? Quite a bit. With schools and restaurants closed, grocery merchants in all channels benefited greatly, both in physical stores and online. We polled more than 30 retailers in the Mid-Atlantic and Northeast regions, and we believe on average that retailer same store revenue jumped about 40 percent during March. With that gain counted as one-twelfth of their annual sales, we believe

See **MARKET STUDY** on page 96

LAST MONTH, THE COASTAL COMPANIES HOSTED A TOUR AT ITS Laurel, MD facility to highlight the new USDA Farmers to Families Food Box Program. Among those in attendance were (l-r) John Corso, The Coastal Companies; Sonny Perdue, U.S. secretary of agriculture; White House advisor Ivanka Trump; Joseph Basciani and Fred Recchiuti, Basciani Foods; and Maryland Governor Larry Hogan.

Chain Seeks To Sell 65.8 Million Shares at $18-$20 Per Share

Albertsons Closer To Going Public As Chain Prices Possible Offering

It's been five years since Albertsons attempted to launch its first initial public offering (IPO) several months after it acquired Safeway. That effort failed due to sliding market conditions.

Another attempt in 2018 to merge with drug chain Rite Aid (already a public entity) also failed when the Camp Hill, PA-based drug chain pulled the plug because it believed its shareholders would reject terms of the $24 billion deal a few days prior to a scheduled

See **ALBERTSONS** on page 77

PLEASE NOTE:

Many events in our region are postponed or cancelled due to the coronavirus oubreak. Check www.foodtrade-news.com for the most recent updates.

June 28-30 • CANCELLED

The Summer Fancy Food Show has been cancelled. For refunds or more information, go to www.specialtyfood.com/shows-events/summer-fancy-food-show/.

July 28 - CANCELLED

Weaver's of Wellsville's selling show has been cancelled.

August 4-5

Bozzuto's Merchandising Marketplace 2020 will be held at Foxwoods Resort Casino in Ledyard, CT. For more information, call 203.272.3511.

August 26 - NEW DATE

Redner's Markets will hold its annual GWR Memorial Golf Outing at several Reading, PA area golf outings. For more information, contact Dan Eberhart at 484.248.5732 or deberhart@rednersmarkets.com or Eric White at 484.248.5730 or ewhite@rednersmarkets.com.

September 1

C&S Robesonia will hold its summer selling show at the York, PA fairgrounds.

September 8 • NEW DATE

Boyer's Markets will hold the Harold S. Boyer Memorial Golf Outing at Mountain Valley Golf Course in Barnesville, PA. Registration begins at 8:30 a.m. with shotgun start at 10:00 a.m. and dinner and awards at 3:30 p.m. For more information, contact Dean Walker at dean@boyersfood.com or Anthony Gigliotti at antgig@boyersfood.com, or call 570.366.1477.

September 22 • NEW DATE

The Heather "Kappesser" DiGuardi Memorial Charity Golf Tournament, sponsored by Family Owned Markets and Genuine Tobacco Co. will be held at Fox Chase Golf Club in Stevens, PA. Registration opens at 11:15 a.m., followed by shotgun start at 12:45 and dinner, prizes and raffle after golf. For more information, email Jim Kidwell at jim.kidwell@familyownedmarkets.com.

September 23-24 • NEW DATE

Seafood Expo North America will host its 2020 event at the Boston Exhibition Convention Center. For more information, go to www.seafoodexpo. com/north-america.

September 23-26 • CANCELLED

Natural Foods Expo East has cancelled its show and is launching "Spark Change: A Digital Product Discovery, Education and Connection Platform for 2020 and Beyond." For more information, go to www.expoeast.com/en/home.html.

October 15-17

At presstime on June 19, PMA plans to hold its Fresh Summit at the Kay Bailey Hutchison Convention Center in Dallas, TX. However, they continue to monitor the situation and will make a final announcement on the show's status on June 30. For more information, go to www.pma.com/events/freshsummit.

October 19-20 • CHANGED TO A VIRTUAL EVENT

The National Frozen & Refrigerated Foods convention will be conducted as a virtual event this year. For more information, call 717.657.8601 or go to nfracon-vention.org.

November 10-11 • CANCELLED

Kosherfest 2020 Has been cancelled. For more information, go to www.kosherfest.com.

AISLE chatter

By Karen Fernandez

It's June, a month that typically signals the changing of the seasons as spring transitions into summer. However, with this year being unlike any other year, this June is bringing more than just changes in the weather. In a time of unrest in which social injustices and racial equalities have come to the forefront, even managing to push a global pandemic to the back burner, people are demanding that these issues be addressed, not just with placating words but with actions. And not only are companies taking notice, but some are making moves to finally start addressing these issues.

PepsiCo, the multinational food, snack and beverage corporation, has announced that it will be investing more than $400 million into a set of initiatives over five years to lift up black communities and increase black representation within the company. In a detailed message from chairman and CEO **Ramon Laguarta** entitled "PepsiCo's Journey to Racial Equality," he explains why and how the Harrison, NY-based conglomerate is making such a large pledge to counter systemic racism.

"The journey for racial equality has long been part of our company's DNA, going back to our first Black sales team in 1947 and the legacy of Harvey Russell. We've also been long-time contributors to the NAACP Legal Defense Fund and will continue to support their work for social justice. But the recent protests in all 50 states and around the world have called on us to honestly assess our efforts. Whilst there are areas we have made progress in the fight against systemic racism and inequality—including pay equity and the diversity of our frontline workforce—we know we cannot keep pointing to what we did decades ago. The promise of our journey remains unfulfilled. We have much work to do going forward, and to echo Dr. Martin Luther King Jr., 'The time is always right to do what is right.'"

The roadmap, which will focus on three pillars: people, business, and communities, includes plans to expand its black managerial population by 30 percent by 2025 through internal development and recruitments, more than doubling the company spend with black-owned suppliers with an incremental spend of $350 million, and investing $50 million to strengthen black-owned businesses over the next five years. PepsiCo has also committed to donating $6.5 million for community impact grants to address systemic issues and will be putting forth $5 million dollars to launch a Community Leader Fellowship program for black non-profit CEOs.

I am beyond impressed at what Laguarta has outlined in his missive and I think it sets a great example for the industry. There are too many details for me to list here, but there is a complete breakdown of the global CPG manufacturer's commitment to addressing racial inequality within the company and its community included in his message – be sure to check it out at www.pepsico.com/racial-equality-journey.

Speaking of PepsiCo, Quaker Oats, one of its subsidiaries, will be retiring its iconic Aunt Jemima. The Chicago-based company has acknowledged that the origins of the 130-year-old brand, which at one time featured a black woman dressed as a minstrel character, "are based on a racial stereotype" and that getting rid of name and logo is one of the steps that it is taking "to make progress toward racial equality." Following suit is Uncle Ben's, which features the portrait of a Chicago chef and waiter named Frank Brown, whose likeness was used to represent an African-American farmer who was known for growing quality rice, although the image has long been viewed as racist. With the spotlight being shined on traditional company mascots that perpetuate overt racial stereotypes, the parboiled rice company will also be taking this opportunity to change its brand identity. In a recently released statement, the Mars, Inc.-owned brand said, "As a global brand, we know we have a responsibility to take a stand in helping to put an end to racial bias and injustices. As we listen to the voices of consumers, especially in the Black community, and to the voices of our associates worldwide, we recognize that now is the right time to evolve the Uncle Ben's brand, including its visual brand identity, which we will do. We don't yet know what the exact changes or timing will be, but we are evaluating all possibilities. Racism has no place in society. We stand in solidarity with the Black community, our associates and our partners in the fight for social justice. We know to make the systemic change needed, it's going to take a collective effort from all of us – individuals, communities and organizations of all sizes around the world." Reportedly, Conagra is also reviewing its Mrs. Butterworth brand for similar reasons, as is Cream of Wheat parent company, B&G, whose original chef mascot was named Rastus, which is now considered a pejorative term that to describe African Americans and is offensive. "We understand there are concerns regarding the Chef image, and we are committed to evaluating our packaging and will proactively take steps to ensure that we and our brands do not inadvertently contribute to systemic racism," the company said in a statement. "B & G Foods unequivocally stands against prejudice and injustice of any kind."

These brands aren't the first ones this year to make moves towards renovating their stereotype-driven mascots. Land O' Lakes decided to remove an image of a kneeling Native American maiden, which had been the face of their products for nearly 100 years, in April. While the mascot has in recent years been protested for what some perceive as an offensive and inaccurate representation of Native Americans, the dairy company gave no specific reason for its removal.

Also making moves to respond to the call for racial systemic change in this country is Albertsons Companies, which has made a commitment to donate $5 million to social justice organizations as well as those on the front line of the fight for equality. The first step the company took was a conversation where executive leaders listened to African American associates and several of its Associate Resource Groups. The company's leadership heard that they should hold similar conversations with their own teams throughout the organization – which it has already initiated – and decided to take concrete action to foster lasting change. Steps being taken include a $2 million donation toward the social justice efforts of the NAACP Legal Defense and Education Fund and the National Urban League Inc and a $1 million donation toward the company's African American Associate Resource Group's efforts to partner with local organizations who are working to support communities and neighborhood actions through-

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TAKING STOCK

From page 1

fared well over the past four months and are poised to take advantage of additional online business ahead.

Amazon (Whole Foods) with its heavy reliance on e-commerce (especially delivery), Walmart with a more balanced approach between its growing online presence and its powerful store fleet have expanded their overall business model during the pandemic. Additionally, traditional supermarket chains Ahold Delhaize USA and Kroger (Harris Teeter) have benefited from having invested early on in an omni-channel approach, while others like Albertsons and Costco, who were a bit late to the e-commerce game, are making progress.

To be successful in food retailing, you also need a bit of luck. We all know that Publix is a first-tier merchant and also the most profitable retailer in America. But what if most of Publix's store weren't in Florida and they were judged by their results in other states where competition is much more fierce? Of course, it could be argued Publix's skill and acumen are the reasons that the landscape of the Sunshine State looks like it does.

Conversely, look at ShopRite - also successful by any measure (number one in Metro New York and the Delaware Valley). But could its member-owners be even more profitable if they didn't face the intense competition of operating in New York and Philly, where infrastructure costs are higher because of real estate, associate compensation and unionization?

And then there's Wegmans, perhaps the one retailer that over the last 25 years has arguably outshined all others. And here's where luck comes into play. Nobody has built finer shopping arenas than the Wegman family. Nobody has provided the variety of in-store shopping options than the Rochester-based uber-retailer. And no other retailer can claim the level of customer service – training, knowledge and direct contact – than the highest per-store volume supermarket retailer in the U.S.

Yet, because of the changes that have become part of the new normal, a lot of Wegmans' stellar work has to be reimagined. Yes, the privately-held firm was late to get into the full e-commerce portal (it is now fully integrated). In hindsight, you may question that decision. But when your focus is almost entirely on enticing the customer to visit your "theater of food" and can substantiate that with also the highest basket "ring" among all supermarkets, you've got a

TAKING STOCK continues on page 14

The Mid-Atlantic Market

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

This map shows the area included in the study. Several companies included in this study also operate stores outside of this area. Data on those stores is not part of this study.

In 10 of the counties/cities in this study, the volumes of the retailers operating there exceed the overall volumes for the counties or cities. They are: Sussex, DE; Montgomery, MD; Worcester, MD; Cumberland, PA; Lancaster, PA; Lebanon, PA; Accomack, VA; Chesapeake, VA; Orange, VA; and Virginia Beach, VA.

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 and supercenters in these more densely populated counties or cities. Remember, county food sales are based on population and per capita weekly food expenditures of residents from only that particular county.

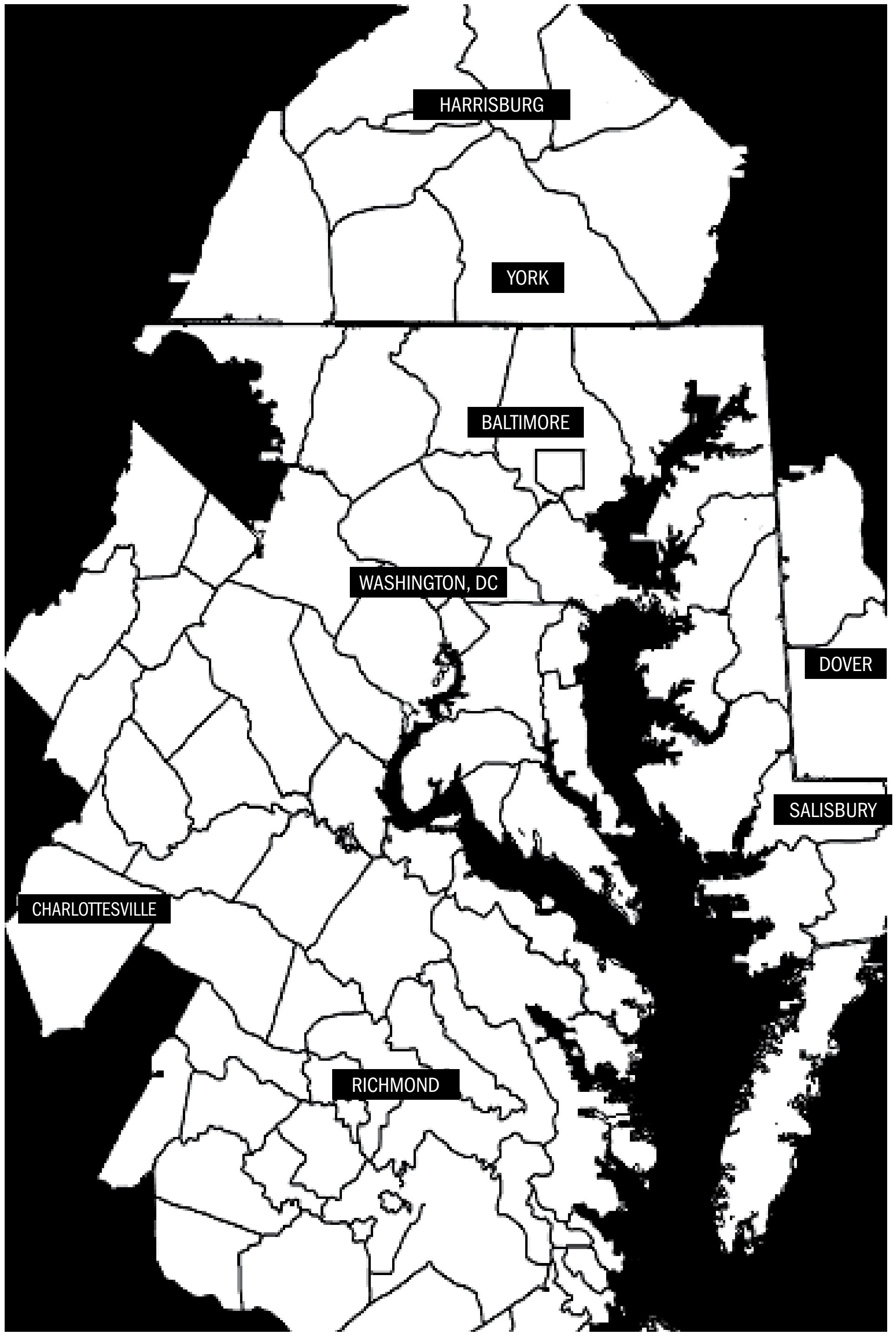
Leakage, or “county-hopping,” can result from a sparsity of stores in one county causing consumers to shop in a bordering county where food retailing opportunities are more available, creating a build-up of food sales in those areas. High volume retailers such as Walmart, Costco and Wegmans, which operate stores in the 140,000-214,000 square foot range, can draw people from a much wider geographic area than virtually all other retailers in a given marketing area.

Moreover, stores located in resort areas such as Sussex County, DE (Rehoboth Beach), Worcester County, MD (Ocean City) and Virginia Beach, VA draw much of their summer sales from visitors who don’t reside in those resort areas.

This year, due to the coronavirus pandemic, the incredible increase in business experienced by most retailers just in the month of March created an unprecedented amount of “county-hopping” spending. Obviously, denizens who lived in a particular county and shopped in that same county also spent much more on groceries as they stockpiled foods during the pandemic.

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, yet are not included in the survey.




NOAH'S PRIDE TM
Lancaster County Fresh
From our family farm to your table, enjoy premium cage free & cage free organic eggs from Noah's Pride.
Noah Sr. (first generation) with Noah Jr. (second generation) on the farm in 1970.
We're more than just a brand, we're tradition.
cage free
farm fresh
BROWN EGGS
Since 1935
NOAH'S PRIDE
12 GRADE A
cage free
farm fresh
ORGANIC BROWN EGGS
NET WT 24 OZ (1LB 8 OZ) 680g
NOAH'S PRIDE
KEEP REFRIGERATED AT OR BELOW 45°
12 GRADE A
LARGE
Fed all organic, vegetarian diet
No antibiotics
No animal by-products
No added hormones*
USDA ORGANIC
Since 1935
Our cage free & organic hens are fed:
✓ All Vegetarian Diet
✓ No Antibiotics
✓ No Animal By-Products
✓ No Growth Hormones*
*no hormones are used in the production of shell eggs

FOOD WORLD'S LEADING CHAIN STORES: 2020

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 85. Petroleum sales are not included. **Total sales of retail grocery, drugs, HBC, general merchandise and tobacco products in the Mid-Atlantic area are $50.04 billion**.

Rank	Company	Stores	2020 Sales (in millions)	2020 % of Area Market
1	Giant Food	158	$5,623.42	11.24%
2	Walmart (SuperCenter/Neighborhood Mkt)	161	$5,021.80	10.03%
3	CVS+	639	$3,357.80	6.71%
4	Food Lion	254	$2,868.30	5.73%
5	The Giant Company (Martin's)	59	$2,397.41	4.79%
6	Safeway	110	$2,336.34	4.67%
7	Harris Teeter	79	$2,101.30	4.20%
8	7-Eleven	1,118	$2,024.00	4.04%
9	Wegmans	22	$1,753.70	3.50%
10	International Markets	131	$1,749.60	3.50%
11	Walgreens	328	$1,684.30	3.37%
12	Target (Super Target)	109	$1,599.00	3.20%
13	Costco	30	$1,584.80	3.17%
14	Weis Markets	99	$1,584.20	3.17%
15	Kroger (Marketplace)	41	$1,227.40	2.45%
16	Whole Foods	30	$1,093.30	2.18%
17	Wawa	164	$1,063.17	2.12%
18	BJ's Wholesale Club	29	$935.00	1.87%
19	Sam's Club	26	$919.40	1.84%
20	Aldi	120	$869.55	1.74%
21	Rite Aid	202	$665.60	1.33%
22	Shoppers	24	$643.70	1.29%
23	Military Commissaries	20	$607.04	1.21%
24	Trader Joe's	27	$590.60	1.18%
25	Sheetz	140	$507.10	1.01%
26	ShopRite (Price Rite)	19	$444.40	0.89%
27	Royal Farm Stores	198	$427.60	0.85%
28	C&S Independents	111	$342.39	0.68%
29	Save-A-Lot	49	$281.10	0.56%
30	Lidl	37	$279.80	0.56%
31	Redner's Markets	13	$248.30	0.50%
32	MOM's Organic Market	16	$221.60	0.44%
33	Publix	15	$00.30	0.43%
34	Fresh Market	16	$198.00	0.40%
35	Acme Markets	8	$169.30	0.34%
36	Turkey Hill	116	$164.30	0.33%
37	Fas-Marts	98	$153.50	0.31%
38	Rutter's Farm Stores	68	$122.90	0.25%
39	Great Valu	14	$111.60	0.22%
40	Dash-In	43	$78.40	0.16%
41	High's/Baltimore	49	$75.30	0.15%
42	Sprouts	4	$68.80	0.14%
43	Kmart	11	$65.50	0.13%
44	Grocery Outlet	10	$62.10	0.12%
45	Circle K	33	$61.60	0.12%
46	Giant Eagle	4	$36.10	0.07%
47	Miller Marts	17	$27.40	0.05%
48	IGA	2	$14.70	0.03%
49	America's Food Basket (Ideal)	1	$7.60	0.02%
50	ASG	1	$5.68	0.01%
51	XtraMart	2	$4.30	0.01%
	GRAND TOTAL	**5,075**	**$48,680.40**	**97.30%**

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

+Includes stand-alone CVS and in-store Target pharmacies.

Source*: Food World,* June 2020

DIRECTORY OF RETAILERS

SUPERMARKETS

Acme Markets, Inc.
Div. of Albertsons Cos.
75 Valley Stream Pkwy.
Malvern, PA 19355
Phone: (610) 889-4000
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Pres.: Jim Perkins
VP-Marketing/Merch.: Kim Gray
VPs-Operations: Bill Crosby, Brad Spooner
DMs: Mike Styer, Joe Hultz, Bud Corry, Kevin Reger, Matt Juhring, Brendan Murphy, Jonathan Cruz, Susan Voelkner
Sales Mgr.-Meat/Seafood: Charlie Bell
Sales Mgr.-Deli: Mary Washinko
Sales Mgr.-Bakery: Jenifer Krause
Sales Mgr.-Grocery: Don O'Brien
Sales Mgr.-Produce: Jay Schneider
Sales Mgr.-Floral: Susan Glenn
Dir.-Marketing: Sherry Caldwell
Primary Supplier: Direct
FW Stores: 8
FW Vol.: $169.3 million

Ahold Delhaize USA
1385 Hancock St.
Quincy, MA 02169
Phone: (800) 767-7772
Web: aholddelhaize.com
Ahold Delhaize CEO: Frans Muller
Ahold Delhaize USA CEO: Kevin Holt
Pres.-Retail Bus. Services: Roger Wheeler

Albertsons
250 Parkcenter Blvd.
Boise, ID 83706
Phone: (208) 395-6200
Web: Albertsons.com
Co-Chmn.: Jim Donald, Leonard Laufer
Pres./CEO: Vivek Sankaran

Aldi, Inc.
1200 N. Kirk Rd.
Batavia, IL 60510
Phone: (630) 879-8100
Web: aldi.com
CEO: Jason Hart
Co-Pres.: Charles Youngstrom, David Behm, Brent Laubaugh
Primary Supplier: Direct
FW Stores: 120
FW Vol.: $869.55 million

America's Food Basket
1979 Marcus Ave., Ste. 216
Lake Success, NY 11042
Phone: (516) 502-2509
Fax: (516) 775-1574
Web: afbasket.com
CEO: David Siegel
COO: Daniel Suriel
Controller: Stephanie Lopez
HR/Social Media/PR: Ashli Pacheco
AP Administrators: Stacy Diaz, George Wilches, Mark Josue
Mktg. Manager: Juan Pena
SVP-Ops.: Amanda Espinal
VP-Fresh Foods: Wilson Estupinan
VP-Merch.: Angela DeCicco
Mgr.-Dairy/Frozen: Anthony Abrue
Primary Supplier: UNFI
FW Stores: 1 (Includes Ideal)
FW Vol.: $7.6 million

Associated Stores Group
99 Seaview Blvd.
Port Washington, NY 11050
Phone: (516) 256-3100
Fax: (516) 256-3110
Web: shopassociated.com
Pres./CEO: Joe Garcia
CAO: Zulema Wiscovitch
VP-Sales: Francisco Nieves
VP-Merch./Customer Experience: Michelle Mendoza
Primary Supplier: C&S Wholesale Grocers
FW Stores: 1
Est. FW Vol.: $5.68 million
*This is the advertising and marketing arm that serves a group of independent retailers including such banners as Associated, Compare, Met and Pioneer. They are supplied by C&S Wholesale Grocers.

B. Green & Co., Inc.
1300 S. Monroe St.
Baltimore, MD 21230
Phone: (410) 783-7777
Web: bgreenco.com
Chmn.: Benjamin Green
CEO: Rick Rodgers
VP-Merch./Procurement: Matt Battaglia
VP-Ops.: Dave Mariano
Primary Supplier: UNFI
FW Stores: 11 (Includes Food Depot/Green Valley Market/Shoppers Value)
FW Vol.: $190.3 million

Balducci's
Div. of KB Holding Inc.
9201 Corporate Blvd., Ste. 340
Rockville, MD 20850
Phone: (844) 259-3875
Web: balduccis.com
Pres./CEO: Judy Spires
CFO: Jim Moriarty
Primary Supplier: Wakefern Food Corp.
FW Stores: 4
FW Vol.: $72.6 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
VP-Ops: Mike Zmitrovich
Dir.-HR: Ann Marie Blashock

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Risk Management Strategies For Grocery Stores:

Protecting Workers And Customers From COVID-19

BY Jason Lotter,
Scott Dotson, Corey Boles

Since the first cases in the U.S. emerged in early 2020, the COVID-19 pandemic has affected the personal and work lives of individuals across the country. Personal habits, social interactions, travel and business practices have been impacted. Grocers, ranging from single, family-owned stores to nationwide supermarket chains, have continued operations as essential businesses throughout the pandemic and have been forced to answer challenging questions that other businesses are only now having to consider, such as:

- How can we ensure the safety and health of our workers and customers?
- Are certain groups of workers at greater risk of COVID-19?
- Can the implementation of click list services (pickup or delivery) aid in reducing workers' and customers' risk of infection?
- How should we respond if there is a reemergence of COVID-19?

Although governmental agencies, such as the CDC, OSHA, and FDA have developed guidance to assist businesses with a broad range of topics related to COVID-19, these recommendations are often not business-sector specific nor intended to address the challenging questions above. In place of such general recommendations, businesses are actively developing COVID-19 risk management plans, which demonstrate to their customers and workforce that they are responding to COVID-19 with a focus on safety and health.

Developing Risk Management Plans

The COVID-19 pandemic has created a unique situation for grocers, which has required a risk management strategy incorporating a combination of engineering controls, administrative controls and personal protective equipment (PPE). As with any risk management approach, those addressing COVID-19 should be multi-layered and

Dr. Scott Dotson

customized to the grocer's operations. Another important aspect of risk management during COVID-19 for grocers is risk balance. Simply put, grocers should ensure that the risk management plans they implement do not themselves contribute to the unintentional spread of COVID-19 or contribute additional risks to workers and customers. Considerations for implementation of multi-layered risk management approaches include:

Chemical Disinfection: The active ingredients in many disinfectant products are inhalation and dermal hazards and may present risks to not only workers, but to customers as well, if not properly used. Employee training is key to the safe use of disinfectants, as unintentional mixing of certain chemicals can generate hazardous gases, which have resulted in acute health effects or even death. Chemical disinfectants have prescribed contact times in which the amount of time that the chemical must remain on the surface to be effective. For frequently-touched surfaces (e.g., shopping cart handles), grocers should consider a selection of disinfectants with lower contact times or store practices that allow for adequate time between disinfectant application and customer use.

Alternative Disinfection Technologies: In addition to more established methods, such as use of disinfectants from EPA's List N: Disinfectants for Use Against SARS-CoV-2 (COVID-19) , grocers may consider incorporation of newer technology (e.g., UV irradiation) with an understanding of their proper uses and limitations. For instance, UV irradiation will not penetrate surfaces and pre-cleaning of dirty surfaces may be required.

Physical Barriers: The use of transparent barriers (e.g., Plexiglass) can be an effective means to reduce the likelihood of droplet transmission between customers and cashiers. However, installation of barriers should be performed in consultation with a ventilation specialist as these barriers may create unwanted air mixing in areas surrounding cash registers. This may allow for an increase in spread of droplets in these areas if not properly designed.

Another risk management aspect that grocers should take into consideration is the perception of risk associated with the virus, or an individual's subjective judgment regarding the risk of becoming infected. The perception of risk can differ significantly between individuals. For instance, while many people may already feel safe shopping without the use of facemasks, other individuals may not feel comfortable doing so even long after their use is no longer mandated. Thus, in implementation of risk management strategies for COVID-19, it is important that grocers consider not only how a typical customer feels, but also how the most sensitive or risk averse customer feels.

Risk communications play a vital role in responding to customers' risk perceptions, as well as building trust in the company and organization among both workers and customers. Just as customers are demanding increased transparency in food preparation and other aspects of their grocery shopping experience, transparency in efforts to control COVID-19 may be a factor for many customers in decid-

See **RISK MANAGEMENT** on page 91

TAKING STOCK

from page 6

formula that's clearly been uber-successful.

It took a highly contagious virus that created the need for social distancing and face masks to shut down the service departments at all retail outlets. If you're Food Lion, the impact wasn't horrible; if you're Wegmans, the effect was consequential.

Currently, Wegmans' vaunted self-service hot and cold bars are closed. However, the company is experimenting with a modified approach to some of their service areas such as operating their Mediterranean bars as associate-manned stations where custmers' orders are filled for them. In bakery, customers can select cookies, for example, in much the same manner, and the retailer is utilizing a variety of service modifactions that allow them to still connect the shopper to Wegmans' foodservice offerings with a different form of delivery.

Wegmans admits that it's traveling in uncharted waters, but has vowed to remain "agile" as it navigates the future path of the pandemic and ensuing shopper behavior. The company feels it has the preparedlness, intelligence and talent both at store level and at headquarters to ultimately provide what their loyal customers want. Reinventing the Taj Mahal won't be easy.

And for all retailers on a broader plane, there are some other realities on the horizon that are going to be challenges. When schools are back in a few months (assuming there won't be a second COVID wave), retailers will be ceding some gains they've had since March. And while restaurants will take longer to fully reopen (what a nightmare the foodservice sector has experienced), that'll be more ground that retailers will sacrifice.

Underlying all of this is the jobs outlook. If unemployment remains above 10 percent (it was 13.3 percent in May) for a prolonged period of time, then all businesses are in trouble. Yes, people will still have to eat (and probably overwhelmingly at home), but the unprecedented days of March, where for a two-week period comp store sales jumped more than 100 percent, will be so far back in the rear-view mirror that those gains will seem invisible. I pray that doesn't happen.

So, now back to reality. As I've done for 41 previous years, here's my take on the market leaders in the core Baltimore-Washington market.

Giant Food – It was a big year for the perennial B-W market leader. The division of Ahold Delhaize USA (ADUSA) experienced strong pre-COVID comps and like many other retailers had robust sales in March. For the first time in nearly a decade, Giant actually had a net gain to its store count. It also settled new four-year labor contracts with its clerks and meatcutters. Internally, the work of former president Gordon Reid (now leading sister firm Stop & Shop) and current leader Ira Kress (former SVP-operations) has paid off. The company's culture is the best it's been since Ahold acquired Giant more than 20 years ago. And one more change that was made in 2018 has really helped the Landover, MD-based merchant as well: the decentralization of all ADUSA brands has helped Giant be a better merchant by restoring local identity to a company that been the market leader for more than 40 years.

Safeway – A relatively flat year (except for the month of March) for the Lanham, MD-based unit of Albertsons. Despite the fine work of eastern division president Tom Lofland, who has helped vastly improve morale at the 108-store division, Safeway simply needs more capital from parent company Albertsons if it wants to become more competitive in a very overcrowded, rivalrous marketplace. The company only has one new store on its books (a replacement supermarket in Washington DC) and the need to replace and remodel other older units, despite excellent locations is needed. Perhaps if Albertsons does complete its IPO more cap-ex will become available. Internally, like Giant, the company and its two UFCW Locals inked new four-year labor deals. And last month it began shifting merchandise from its distribution center in Upper Marlboro, MD to another Albertsons facility in Denver, PA where it will share services with sister merchant Acme Markets.

Walmart – As the Behemoth continues to focus on building its e-commerce business, the role of its bricks and mortar units hasn't really been diminished in any area other than store growth. Day-to-day at its 63 stores in the $29.2 billion market (most of them SuperCenters), the focus remains the

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From page 12

Meat/Seafood Merch.: Joseph Cutrona
Produce Merch.: Michael Bush
Deli/Bakery Merch.: Mellisa Erickson
Non-Perishable Merch.: Jeff O'Neill
Primary Supplier: UNFI
FW Stores: 11
FW Vol.: $9.51 million

C&S Independents
P.O. Box 67
Robesonia, PA 19551
Phone: (610) 693-3161
Web: cswg.com
Primary Supplier: C&S Wholesale Grocers
FW Stores: 111
FW Vol.: $342.39 million
*C&S Independents are comprised of the independent supermarkets serviced by C&S Wholesale Grocers and supplied from its Robesonia, PA regional headquarters.

Eddie's of Roland Park
5125 Roland Ave.
Baltimore, MD 21210
Phone: (410) 323-3656
Web: eddiesofrolandpark.com
CEO/Pres.: Nancy Cohen
Primary Supplier: Bozzuto's
FW Stores: 2
FW Vol.: $34.6 million

Family Owned Markets
814-D Dawn Ave.
Ephrata, PA 17522
Phone: (717584-3537
Fax: (717) 721-1955
Web: familyownedmarkets.com
FW Stores: 8
FW Sales: $131.3 million
Dir.-Marketing: Jim Kidwell
*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, Musser's Markets, Saubel's and Yoder's Country Market. They are currently supplied by MDI.

Food Lion
Div. of Ahold Delhaize USA
P.O. Box 1330
Salisbury, NC 28145
Phone: (704) 633-8250
Web: foodlion.com
Pres: Meg Ham
Primary Supplier: Direct
FW Stores: 254
FW Vol.: $2.87 billion

The Fresh Market
628 Green Valley Rd., Ste. 500
Greensboro, NC 27408
Phone: (336) 272-1338
Web: thefreshmarket.com
Pres./CEO: Jason Potter
CFO: Oded Shein
Primary Supplier: UNFI
FW Stores: 16
FW Vol.: $198 million

Geresbeck's Food Market
2109 Eastern Blvd.
Baltimore, MD 21220
Phone: (410) 686-3487
Web: geresbecks.com
CEO/Pres.: Carl Greeley
Primary Supplier: C&S
FW Stores: 3
FW Vol.: $31.4 million

Giant Eagle
101 Kappa Dr.
RIDC Park
Pittsburgh, PA 15238
Phone: (412) 963-6200
Web: gianteagle.com
Pres./CEO: Laura Karet
Primary Supplier: Direct
FW Stores: 4 (includes Get Go)
FW Vol.: $36.1 million

The Giant Company
Div. of Ahold Delhaize USA
P.O. Box 249
28 Brookwood Ave.
Carlisle, PA 17015
Phone: (717) 249-4000
Web: giantfoodstores.com
Pres.: Nick Bertram
SVP-Store Ops.: John Ponnett
SVP-Merch.: John Ruane
VP-Perishables: Dave Lessard
Primary Distributor: C&S Wholesale Grocers/Direct
FW Stores: 59 (includes Martin's)
FW Vol.: $2.4 billion

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-Merch.: Tonya Herring
VP-Non-Perishables: Michael Weinstock
Primary Supplier: Direct
FW Stores: 158
FW Vol.: $5.62 billion

Graul's
12200 Tullamore Rd.
Timonium, MD 21093
Phone: (410) 308-2100

See **DIRECTORY** on page 62


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Mini Lobster Bites
FULLY COOKED AND READY IN MINUTES
Seafood america
Seafood America LLC, 645 Mearns Road Warminster PA 18974— Phone (215) 672-2211 Fax (215) 675-8324 www.docksideclassics.net

MARKET STUDY: RULES & ANALYSIS

For the first time in 42 years, we are publishing two *Food World* market study issues. No, that's not quite right; it just feels like two issues – the one where we gathered data for the first 11 months of our measuring period (April 1, 2019 through February 29, 2020), and a separate data collection for the month of March.

Never in the history of the modern grocery business has one month impacted sales more than March 2020.

So, when you view the sales totals for most retailers, you'll notice that virtually all merchants in all the channels that we cover (supermarket, mass, club, drug and c-store) have posted increased sales for the entire 12-month period. Our challenge was to determine what those March percentage gains were (by individual retailer) and factor them against the other 11 months of measurement.

We'd like to thank the nearly 70 retailers whose sales and shares are measured in the annual review. Many of them worked with us closely to provide accurate annualized data given the wild fluctuations they experienced.

And while each retailer included in the annual market survey encountered their own individualized sales variations, as a general rule comp store revenue jumped about 40 percent for the entire month of March (however, during the middle two weeks of the month, comp sales for many retailers more than doubled). For the first 11 months of our measuring period, the median comp store gain was approximately 1.1 percent.

During that time, market conditions continued to be challenging – there are still too many stores in virtually every area and the diversity of competition makes it very difficult for retailers to find an open lane for gaining share.

The biggest growth sector continued to be the "extreme value" channel where both Lidl and Aldi added double-digit new stores, with the latter discounter also remodeling more than 20 other units. Another discounter with a much bigger box, Walmart, also posted impressive comp store gains, both pre-COVID and during the month of March. In a rarity, Walmart did not open any new stores this year and in fact closed two Neighborhood Markets in Virginia, the first time the "Bentonville Behemoth" had reduced its store count in the region since the company entered the Mid-Atlantic market in the late 1980s. Moreover, when you view our eight "Market Leader" charts in this issue, you'll notice that the alternate channels as a group (mass, club, drug and c-stores) continue to grab more grocery share from traditional supermarket operators.

While overstoring and other issues such as dealing with reduced SNAP benefits are still troublesome, they frankly moved to the back burner once COVID-19 began to spread, rapidly forcing a series of moves that have altered the ways retailers are now thinking and acting.

There's no hiding that retailers in all channels that sell food had unprecedented sales (and earnings) gains over the past three months. Those huge increases continued into April, trickled down a bit in May and now have flattened to levels that are still impressive, but not overwhelming.

Meanwhile, other concerns have arisen, some during the pandemic, others on the horizon. There's no question that all retailers encountered huge additional expenses in dealing with the health crisis. Providing associates with personal protective equipment (particularly masks), increasing store cleanings, installing sneeze guards, creating special signage and properly increasing compensation to associates at both stores and distribution centers were costly - and proper - decisions. While most retailers will end their bonus compensation programs by the end of this month (if they haven't ended them already), other new expenses are here to stay.

It's a sticky wicket for most retail merchants, who know their virtually unimpeded sales path of the past few months is certain to decline. When children return to school this fall, that will impact the "full family stay-at-home eating" advantage that they've enjoyed, and as restaurants begin to trickle open, the foodservice lane will also begin to be refilled.

Overriding this for all retail and foodservice channels is the skyrocketing unemployment numbers. If you add in the "hidden" numbers that weren't counted in the last public measurement, the unemployment rate is almost 20 percent.

And even as the country starts reopening, it is doing so slowly and cautiously; visualizing unemployment under 10 percent over the next six months is probably unrealistic. Those are figures that frighten retailers, not to mention that a second wave of COVID infections would likely negate any encouraging progress toward normalcy.

Perhaps the most visceral reality that food retailers experienced over the past 120 days was the huge uptick in e-commerce business. Those customers who had previously utilized digital shopping opportunities, increased their usage. And many consumers explored online shopping for the first time – omni-channel retailing has truly emerged.

And those retailers that had both financially and/or emotionally invested in the "full Monty" of e-commerce offerings or were so good at attracting consumers to their bricks and mortar stores because they provided the right types of goods at the right price had stellar sales during the past three months and have created a launching pad for future success.

Walmart, The Giant Company and sister firm Giant Food are examples of creating a balance between increased volume at its stores and through its digital initiatives. Aldi (which does have a digital component) is arguably the best example of maximizing their potential with its physical stores. During the height of the panic buying, Aldi had the products that consumers wanted at the right price with good service levels. Nobody operates stores as efficiently as the German discounter.

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 12 months.

Baltimore-Washington

Simply stated, this was the best year that Giant Food has enjoyed since the company was acquired by Ahold in 1999. Pre-COVID sales were strong and during the month of March same store sales topped 30 percent which helped the Landover, MD-based chain increase its market share by one full point, no small achievement in a very crowded $29.2 billion market. Other retailers that moved the needle forward by opening new stores were drug merchants CVS (which surpassed Walmart as the third largest retailer in the market) and Walgreens, which opened approximately 75 former Rite Aid stores. Other gainers that opened multiple new units over the past 12 months included Target (which debuted five new smaller "urban" prototypes), Aldi with six new stores since last year, and the 120 "International Markets," independently owned ethnic and specialty stores that operate in the B-W market, seven more than a year ago. When measuring pure same store sales gains, Walmart, Costco and Trader Joe's had strong comp sales, both pre-COVID and during the month of March. As has been the case for the three years, the biggest decliner in the market was Shoppers, which closed or sold 19 more stores over the past 12 months after shuttering eight stores in 2019. UNFI recently announced that Shoppers will remain part of the company for up to 24 more months, but will be spun off as a separate operating unit. The market's top four retailers - Giant, Safeway, CVS and Walmart -collectively operate 664 stores, amassing $9.53 billion in sales, or 39.14 percent of the Baltimore-Washington market.

Eastern Shore

Another relatively quiet year in terms of market change as two retailers whose operating styles are on opposite ends of the spectrum - Walmart and Food Lion - continued to dominate the Delmarva Peninsula, controlling nearly one-third of the business in the $3.7 million marketing area. Neither chain added any new stores this year. Most of activity in the 12-county market came in the drug and convenience store channels as Walgreens converted two former Rite Aid stores it acquired in 2018 to its own banner and the two dominant c-store merchants, Wawa and Royal Farms, added one and three new units respectively. Of all retailers in the market, Giant Food, with five supermarkets on the Eastern Shore, enjoyed the biggest comp store sales increase.

Central Pennsylvania

With the addition of four new stores and solid same store sales increases, The Giant Company widened its already dominant lead in the eight-county Central PA market. The Carlisle, PA-based "brand" of Ahold Delhaize USA gained sales and share by acquiring stores from former independent owners Ferguson & Hassler (one store) and Musser's Markets (three stores) and posted an impressive 32.3 percent share of the market. For the rest of the pack, comp sales increased for 16 of the remaining 19 retailers, aided by strong March volumes. As far as other new stores in the $6 billion trading area, Karns opened its ninth store (the former Darrenkamp's in Etters, PA) while discounter Aldi debuted a new unit in Lancaster, PA. With Giant's purchase of Musser's and Fergie's (as well as its acquisition of Darrenkamp's last year), the once formidable independent market in the region continues to shrink. In fact, the top three retailers in Central PA - Giant, Weis and Walmart - control 54.6 percent of the region's business.

Richmond

The Richmond market remains the most competitive area in the Mid-Atlantic and one of the most overstored in the country. Walmart held on to its narrow lead over Kroger, despite the fact

See **RULES & ANALYSIS** on page 85

Washington Supermarket Leaders:

Strong Comps Help Giant Widen Supers Lead; Safeway Flat, International Markets Continue Growth

- Giant Extends Dominant Share
- Safeway Dips On Store Closures
- Int'l. Markets Add 5 Locations
- Shoppers Shuts 13, Down To 14
- Fast Growing Aldi Cracks Top 10

Rank	Company	2020 Stores	2020 Sales (in millions)	% of 2020 Market	2019 Stores	2019 Sales (in millions)	% of 2019 Market
1	Giant Food	112	$3,902.72	33.38%	111	$3,571.02	30.92%
2	Safeway	83	$1,719.06	14.71%	85	$1,790.75	15.51%
3	International Markets	101	$1,402.30	12.00%	96	$1,311.40	11.36%
4	Harris Teeter	44	$1,278.30	10.93%	44	$1,243.60	10.77%
5	Wegmans	11	$978.10	8.37%	11	$947.90	8.21%
6	Whole Foods	21	$798.50	6.83%	20	$732.90	6.35%
7	Trader Joe's	18	$433.20	3.71%	17	$395.20	3.42%
8	Shoppers	14	$390.90	3.34%	27	$799.30	6.92%
9	Food Lion	32	$376.60	3.22%	33	$374.80	3.25%
10	Aldi	44	$344.50	2.95%	40	$294.40	2.55%
		480	**$11,624.18**	**99.44%**	**484**	**$11,461.27**	**99.25%**

The chart above lists the top 10 supermarket retailers in the Washington market. Counties/cities included are: Washington, DC; Calvert, Charles, Frederick, Montgomery and Prince George's in MD; Arlington, Clarke, Culpeper, Fairfax, Fauquier, King George, Loudoun, Prince William, Spotsylvania, Stafford and Warren as well as the independent cities of Alexandria, Fairfax, Falls Church and Fredericksburg in VA. Petroleum sales are not included.
( ) Name in parentheses indicates another banner used by the company. **Total supermarket sales for the area are $11.69 billion.** Source: *Food World*, June 2020

Washington Market Leaders:

Alternate Retailers Continue To Grow Share Against Supers; Giant, WFM, TJ's, Aldi Are Exceptions

- **Alts. Share vs. Supers Growing**
- **Despite Drop, Safeway Solid #2**
- **CVS Ups Share, Adds Stores**
- **Target, Walmart Control 9.5%**
- **Post RAD Deal: Walgreens Adds 40**

Rank	Company	2020 Stores	2020 Sales (in millions)	% of 2020 Market	2019 Stores	2019 Sales (in millions)	% of 2019 Market
1	Giant Food	112	$3,902.72	19.38%	111	$3,571.02	18.36%
2	Safeway	83	$1,719.06	8.54%	85	$1,790.75	9.21%
3	CVS+	255	$1,426.40	7.08%	251	$1,259.36	6.48%
4	International Markets	101	$1,402.30	6.96%	96	$1,311.40	6.74%
5	Harris Teeter	44	$1,278.30	6.35%	44	$1,243.60	6.39%
6	Walmart	40	$1,134.90	5.64%	40	$1,096.60	5.64%
7	Costco	17	$1,023.60	5.08%	17	$979.20	5.04%
8	Wegmans	11	$978.10	4.86%	11	$947.90	4.87%
9	7-Eleven	503	$895.70	4.45%	512	$919.55	4.73%
10	Whole Foods	21	$798.50	3.97%	20	$732.90	3.77%
11	Target (Super Target)	48	$780.10	3.87%	43	$687.00	3.53%
12	Walgreens	98	$519.70	2.58%	58	$310.70	1.60%
13	Trader Joe's	18	$433.20	2.15%	17	$395.20	2.03%
14	Shoppers	14	$390.90	1.94%	27	$799.30	4.11%
15	Food Lion	32	$376.60	1.87%	33	$374.80	1.93%
16	Aldi	44	$344.50	1.71%	40	$294.40	1.51%
17	Weis Markets	25	$307.20	1.53%	28	$313.18	1.61%
18	BJ's Wholesale Club	9	$302.70	1.50%	9	$294.10	1.51%
19	Wawa	39	$275.49	1.37%	36	$218.72	1.12%
20	Military Commissaries	8	$250.84	1.25%	8	$268.90	1.38%
		1,522	**$18,540.81**	**92.07%**	**1,486**	**$17,808.58**	**91.57%**

Chart lists top 20 retailers in the Washington market which sell groceries, HBC, drugs, GM, tobacco products. Volumes listed include 100% of store sales for supermarkets, c-stores and drug chains. Sales for club stores, Kmart, Target and Walmart are extrapolated to include comparable categories, as explained in the formula on page 85. Petroleum sales are not included. Counties/cities included are: Washington, DC; Calvert, Charles, Frederick, Montgomery and Prince George's in MD; Arlington, Clarke, Culpeper, Fairfax, Fauquier, King George, Loudoun, Prince William, Spotsylvania, Stafford and Warren as well as the independent cities of Alexandria, Fairfax, Falls Church and Fredericksburg in VA. ( ) Indicates another banner used by the company. **Total food sales for the area are: $20.14 billion.** Source: *Food World*, June 2020

Baltimore Supermarket Leaders:

Giant Food Supermarkets Share Is Greater Than Safeway, Weis Markets, Wegmans Combined

- #1 Giant Posts Strong Comps
- Weis Gaining On Safeway
- Wegmans Is Per-Store Avg. Leader
- Intl. Mkts. Add Stores, Grow Sales
- Shoppers' Sell-Offs Crater Revenue

Rank	Company	2020 Stores	2020 Sales (in millions)	% of 2020 Market	2019 Stores	2019 Sales (in millions)	% of 2019 Market
1	Giant Food	39	$1,478.74	32.59%	39	$1,370.73	30.21%
2	Safeway	25	$581.05	12.81%	25	$596.64	13.15%
3	Weis Markets	26	$454.50	10.02%	26	$429.01	9.46%
4	Wegmans	5	$413.20	9.11%	5	$400.00	8.82%
5	ShopRite (Klein/Village/PR)	13	$339.90	7.49%	14	$368.80	8.13%
6	Shoppers	10	$252.80	5.57%	16	$394.40	8.69%
7	International Markets	19	$238.00	5.25%	17	$206.00	4.54%
8	Food Lion	20	$202.00	4.45%	21	$208.00	4.58%
9	Harris Teeter	6	$200.30	4.41%	6	$193.20	4.26%
10	B. Green (Food Depot/Green Valley)	8	$173.00	3.81%	8	$172.00	3.79%
		171	**$4,333.49**	**95.51%**	**177**	**$4,338.78**	**95.62%**

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

Total supermarket sales for the area are $4.53 billion.

Source: *Food World*, June 2020

Baltimore Market Leaders:

Giant Food Strong, Walmart Solid In $9 Billion Balto. Market; CVS Remains Drug Channel Leader

- Alts. Share Now At 34.2%
- Giant Extends All-Channel Lead
- Walmart Grows On Strong Comps
- Walgreens: #5 With 37 New Units
- C-Stores Control 9.5% Of Mkt.

Rank	Company	2020 Stores	2020 Sales (in millions)	% of 2020 Market	2019 Stores	2019 Sales (in millions)	% of 2019 Market
1	Giant Food	39	$1,478.74	16.29%	39	$1,370.73	15.38%
2	Walmart (SuperCenter)	23	$695.60	7.66%	23	$658.90	7.39%
3	Safeway	25	$581.05	6.40%	25	$596.64	6.69%
4	Weis Markets	26	$454.50	5.01%	26	$429.01	4.81%
5	Walgreens	84	$433.90	4.78%	47	$255.40	2.87%
6	CVS+	87	$432.40	4.76%	81	$388.42	4.36%
7	Wegmans	5	$413.20	4.55%	5	$400.00	4.49%
8	ShopRite (Klein's/Village/PR)	13	$339.90	3.75%	14	$368.80	4.14%
9	7-Eleven	183	$312.90	3.45%	185	$322.30	3.62%
10	Target	18	$271.20	2.99%	18	$265.80	2.98%
11	Sam's Club	6	$261.30	2.88%	6	$254.50	2.86%
12	Costco	5	$253.30	2.79%	5	$242.50	2.72%
13	Shoppers	10	$252.80	2.79%	16	$394.40	4.42%
14	International Markets	19	$238.00	2.62%	17	$206.00	2.31%
15	BJ's Wholesale Club	7	$236.90	2.61%	7	$230.00	2.58%
16	Royal Farm Stores	104	$207.20	2.28%	99	$182.20	2.04%
17	Food Lion	20	$202.00	2.23%	21	$208.00	2.33%
18	Harris Teeter	6	$200.30	2.21%	6	$193.20	2.17%
19	B. Green (Food Depot/Green Valley)	8	$173.00	1.91%	8	$172.00	1.93%
20	Aldi	25	$168.00	1.85%	23	$154.50	1.73%
		713	**$7,606.19**	**83.81%**	**671**	**$7,293.30**	**81.83%**

The chart above lists the top 20 retailers in the Baltimore market which sell groceries, HBC, drugs, general merchandise and tobacco products. Volumes listed include 100% of store sales for supermarkets, c-stores and drug chains. Sales for club stores, Kmart, Target and Walmart are extrapolated to include comparable categories, as explained in the formula on page 85. Petroleum sales are not included. Counties/cities included are: Anne Arundel, Baltimore City, Baltimore, Carroll, Harford, Howard and Queen Anne's. ( ) Indicates another banner used by the company. +Includes stand-along CVS and in-store Target pharmacies.

Total food sales for the area are: $9.08 billion.

Source: *Food World*, June 2020

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Baltimore-Washington Supermarket Leaders:

Giant, Safeway, International Markets, Harris Teeter Control 66.58% Of B-W Supermarket Biz

- New Store, Big Comps Aid Giant
- Safeway Still Solid Second
- Intl. Mkts. Gain; Add 7 Units
- WFM Adds Store, Builds Share
- With 19 Fewer Units, SFW Sinks

Rank	Company	2020 Stores	2020 Sales (in millions)	% of 2020 Market	2019 Stores	2019 Sales (in millions)	% of 2019 Market
1	Giant Food	151	$5,381.46	33.18%	150	$4,941.75	30.72%
2	Safeway	108	$2,300.11	14.18%	110	$2,387.39	14.84%
3	International Markets	120	$1,640.30	10.11%	113	$1,517.40	9.43%
4	Harris Teeter	50	$1,478.60	9.12%	50	$1,436.80	8.93%
5	Wegmans	16	$1,391.30	8.58%	16	$1,347.90	8.38%
6	Whole Foods	25	$943.30	5.82%	24	$870.90	5.41%
7	Weis Markets	51	$761.70	4.70%	54	$742.19	4.61%
8	Shoppers	24	$643.70	3.97%	43	$1,193.70	7.42%
9	Food Lion	52	$578.60	3.57%	54	$582.80	3.62%
10	Aldi	69	$512.50	3.16%	63	$448.90	2.79%
		666	**$15,631.57**	**96.36%**	**677**	**$15,469.73**	**96.17%**

The chart below lists the top 10 supermarket retailers in the Baltimore-Washington market. Counties/cities included are: Washington, DC; Anne Arundel, Baltimore City, Baltimore, Calvert, Carroll, Charles, Frederick, Harford, Howard, Montgomery, Prince George's and Queen Anne's in MD; Arlington, Clarke, Culpeper, Fairfax, Fauquier, King George, Loudoun, Prince William, Spotsylvania, Stafford and Warren as well as the independent cities of Alexandria, Fairfax, Falls Church and Fredericksburg in VA. Petroleum sales are not included. **Total supermarket sales for the area are $16.22 billion.** Source: *Food World,* June 2020

Baltimore-Washington Market Leaders:

Giant Food Widens B-W Overall Market Lead; CVS, Costco Pace Drug, Club Channels Respectively

- Alts. B-W Share Now At 32.8%
- Giant Tops All, Share At 18.4%
- CVS Gaining On Safeway For #2
- Walgreens Adds 77 Locations
- With 69 Stores, Aldi Zooming

Rank	Company	2020 Stores	2020 Sales (in millions)	% of 2020 Market	2019 Stores	2019 Sales (in millions)	% of 2019 Market
1	Giant Food	151	$5,381.46	18.42%	150	$4,941.75	17.42%
2	Safeway	108	$2,300.11	7.87%	110	$2,387.39	8.42%
3	CVS+	342	$1,858.80	6.36%	332	$1,647.78	5.81%
4	Walmart (SuperCenter)	63	$1,830.50	6.26%	63	$1,755.50	6.19%
5	International Markets	120	$1,640.30	5.61%	113	$1,517.40	5.35%
6	Harris Teeter	50	$1,478.60	5.06%	50	$1,436.80	5.07%
7	Wegmans	16	$1,391.30	4.76%	16	$1,347.90	4.75%
8	Costco	22	$1,276.90	4.37%	22	$1,221.70	4.31%
9	7-Eleven	686	$1,208.60	4.14%	697	$1,241.85	4.38%
10	Target (Super Target)	66	$1,051.30	3.60%	61	$952.80	3.36%
11	Walgreens	182	$953.60	3.26%	105	$566.10	2.00%
12	Whole Foods	25	$943.30	3.23%	24	$870.90	3.07%
13	Weis Markets	51	$761.70	2.61%	54	$742.19	2.62%
14	Shoppers	24	$643.70	2.20%	43	$1,193.70	4.21%
15	Food Lion	52	$578.60	1.98%	54	$582.80	2.05%
16	BJ's Wholesale Club	16	$539.60	1.85%	16	$524.10	1.85%
17	Aldi	69	$512.50	1.75%	63	$448.90	1.58%
18	Trader Joe's	22	$506.90	1.73%	21	$467.00	1.65%
19	Wawa	67	$434.63	1.49%	63	$364.82	1.29%
20	Sam's Club	11	$419.40	1.44%	11	$407.70	1.44%
		2,143	**$25,711.80**	**87.99%**	**2,068**	**$24,619.08**	**86.81%**

Chart lists the top 20 retailers in the Balt-Wash market which sell groceries, HBC, drugs, GM and tobacco products. Volumes listed include 100% of store sales for supermarkets, c-stores and drug chains. Sales for club stores, Kmart, Target and Walmart are extrapolated to include comparable categories,as explained in the formula on page 85. Petroleum sales are not included. Counties/cities included are: Washington, DC; Anne Arundel, Baltimore City, Baltimore, Calvert, Carroll, Charles, Frederick, Harford, Howard, Montgomery, Prince George's and Queen Anne's in MD; Arlington, Clarke, Culpeper, Fairfax, Fauquier, King George, Loudoun, Prince William, Spotsylvania, Stafford and Warren as well as independent cities of Alexandria, Fairfax, Falls Church and Fredericksburg in VA. ( ) Alternate banner. **Total food sales for the area are: $29.22 billion.** Source: *Food World,* June 2020

Giant Food Associates Pitch In To Help Area Food Bank Partners During COVID-19 Pandemic

During the pandemic, Giant Food has been actively supporting its local food bank partners twice a month by sending volunteers to help out, rotating between the Maryland Food Bank and the Capital Area Food Bank. Last month, associates from the Landover, MD based retailer lent a hand at the Maryland food bank, including (l-r) Daniel Wolk, Felis Andrade and Peter Walsh.

Under the "Maryland Food Bank Marketplace" sign are (front row l-r) Karen Fernandez, *Food World*; Felis Andrade and Fitzgerald Presume, Giant Food; (back row l-r) Carmen Del Guercio, president and CEO of Maryland Food Bank; Dyani Hanrahan, Peter Walsh, Daniel Wolk, Haley Frazier and Lauren Ludvigen, Giant Food

Being careful to be socially distanced while volunteering at the food bank are (l-r) Haley Frazier, Dyani Hanrahan, Peter Walsh and Lauren Ludvigen, all with Giant Food.

Rachel Christian (l) of the Maryland Food Bank poses for a photo with Giant Food's Fitzgerald Presume.

Helping Marylanders who are struggling to feed their families during the coronavirus breakout are Thomas Higdon (l) and Amy Chase of Maryland Food Bank.

All masked up to volunteer at the food bank last month were Tanaysha Smith (l) and Lisa Lawlor, both with Giant Food.

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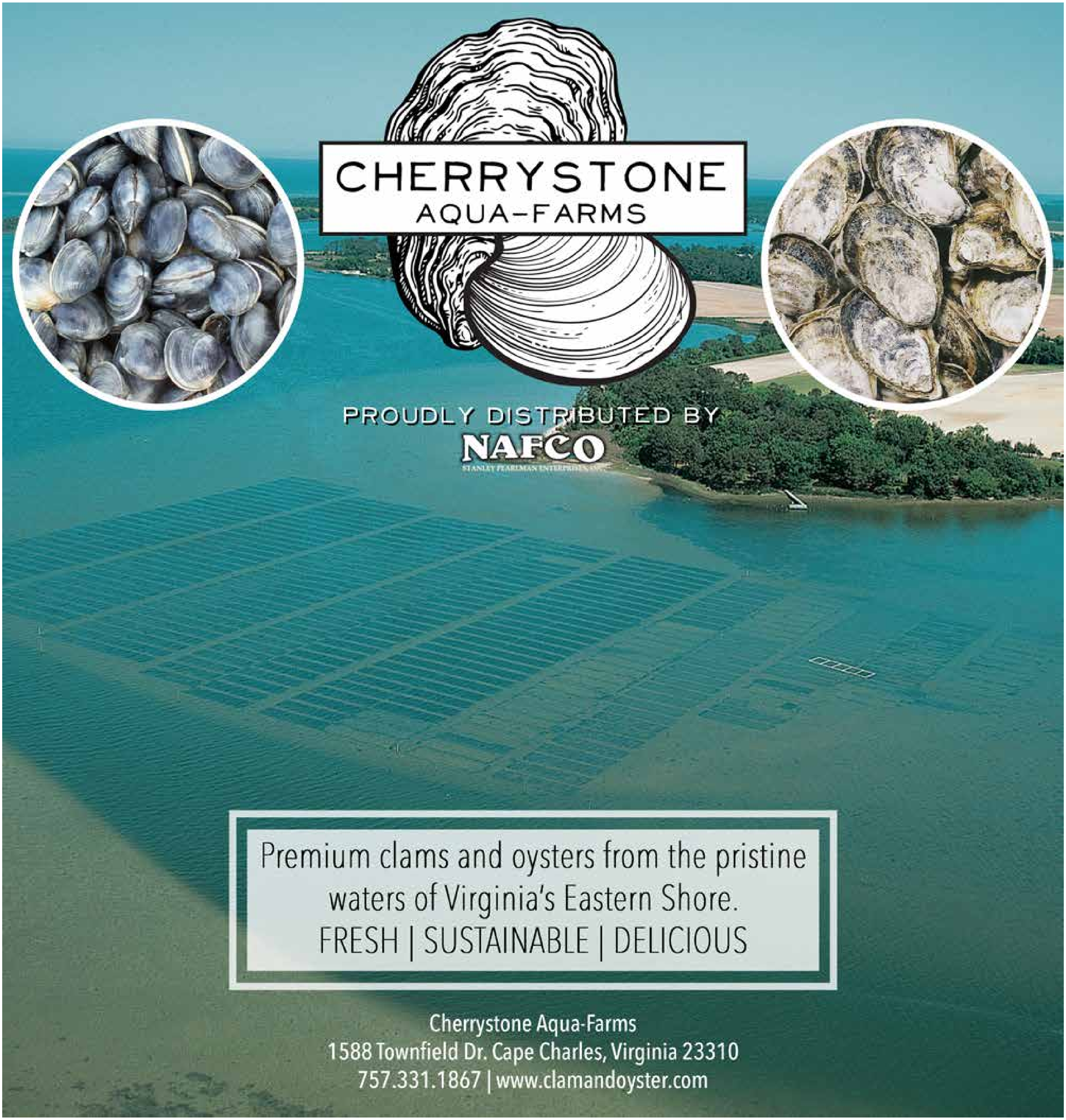
IN REVIEW: HARRIS TEETER

State	County	2020 Stores	2020 Sales (in millions)	2020 County Food Sales	% of 2020 County Market	2019 Stores	2019 Sales (in millions)	% of 2019 County Market
DC	Washington	4	$168.70	$2,196.50	7.68%	4	$166.70	8.14%
DC Recap: 4 stores with sales of $168.7 million. Total retail food sales for DC in the study: $2.2 billion. Harris Teeter share of DC is 7.68%.								
DE	Sussex	2	$35.20	$864.80	4.07%	2	$34.90	4.24%
DE Recap: 2 stores with sales of $35.2 million. Total retail food sales for DE in the study: $1.33 billion. Harris Teeter share of DE is 2.64%.								
MD	Anne Arundel	1	$31.80	$2,039.70	1.56%	1	$31.40	1.51%
MD	Baltimore City	2	$70.40	$1,368.20	5.15%	2	$67.80	4.96%
MD	Calvert	1	$18.40	$349.70	5.26%	1	$18.20	5.43%
MD	Howard	3	$98.10	$1,090.20	9.00%	3	$94.00	9.03%
MD	Montgomery	7	$159.20	$3,412.40	4.67%	7	$155.80	4.83%
MD	Prince George's	2	$34.30	$2,836.10	1.21%	2	$33.60	1.18%
MD	St. Mary's	1	$23.50	$352.60	6.66%	1	$23.20	6.57%
MD	Talbot	1	$23.10	$196.20	11.77%	1	$22.80	11.87%
MD Recap: 18 stores with sales of $458.8 million. Total retail food sales for MD in the study: $18.96 billion. Harris Teeter share of MD is 2.42%.								
VA	Albemarle	3	$65.20	$579.70	11.25%	3	$64.70	11.43%
VA	Arlington	6	$227.30	$845.70	26.88%	5	$184.60	23.27%
VA	Chesapeake City	3	$68.40	$820.40	8.34%	2	$43.60	5.88%
VA	Fairfax	9	$302.60	$4,850.20	6.24%	9	$294.50	6.31%
VA	Fauquier	1	$17.10	$166.30	10.28%	1	$16.90	10.85%
VA	Hampton/Newport News	2	$35.80	$1,049.80	3.41%	2	$35.30	3.49%
VA	James City	3	$89.60	$381.20	23.50%	3	$87.40	23.67%
VA	Loudoun	10	$234.90	$1,379.20	17.03%	10	$239.50	18.33%
VA	Norfolk City	3	$60.20	$718.40	8.38%	3	$58.30	8.11%
VA	Portsmouth City	1	$21.10	$279.10	7.56%	1	$20.90	7.71%
VA	Prince William	4	$115.80	$1,688.30	6.86%	5	$133.80	7.93%
VA	Suffolk City	1	$24.40	$277.80	8.78%	1	$24.10	9.23%
VA	Virginia Beach	9	$176.20	$1,498.70	11.76%	9	$183.70	12.38%
VA Recap: 55 stores with sales of $1.44 billion. Total retail food sales for VA in the study: $21.56 billion. Harris Teeter share of VA is 6.67%.								

Mid-Atlantic Recap: 79 stores with sales of $2.1 billion annually. Mid-Atlantic retail food sales total: $50.04 billion.
Harris Teeter Per Store Average: $26.6 million

Source: *Food World,* June 2020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IN REVIEW: GIANT FOOD

State	County	2020 Stores	2020 Sales (in millions)	2020 County Food Sales	% of 2020 County Market	2019 Stores	2019 Sales (in millions)	% of 2019 County Market
DC	Washington	7	$278.18	$2,196.50	12.66%	7	$264.42	12.91%
DC Recap: 7 stores with sales of $278.18 million. Total retail food sales for DC in the study: $2.2 billion. Giant Food share of DC is 12.66%.								
DE	Sussex	4	$147.04	$864.80	17.00%	3	$134.93	16.41%
DE Recap: 4 stores with sales of $147.04 million. Total retail food sales for DE in the study: $1.33 billion. Giant Food share of DE is 11.04%.								
MD	Anne Arundel	9	$393.06	$2,039.70	19.27%	8	$321.57	15.51%
MD	Baltimore City	6	$235.99	$1,368.20	17.25%	7	$235.67	17.23%
MD	Baltimore County	14	$484.62	$2,929.60	16.54%	14	$461.72	16.25%
MD	Calvert	3	$127.17	$349.70	36.37%	3	$123.86	36.95%
MD	Carroll	1	$32.44	$595.40	5.45%	1	$30.93	5.30%
MD	Charles	2	$70.45	$449.80	15.66%	2	$63.05	13.61%
MD	Frederick	3	$101.69	$827.60	12.29%	3	$95.67	12.11%
MD	Harford	2	$66.06	$929.60	7.11%	2	$64.55	7.36%
MD	Howard	7	$266.57	$1,090.20	24.45%	7	$256.29	24.63%
MD	Montgomery	26	$1,046.43	$3,412.40	30.67%	27	$910.62	28.22%
MD	Prince George's	17	$534.03	$2,836.10	18.83%	17	$503.60	17.62%
MD	St. Mary's	1	$30.43	$352.60	8.63%	1	$28.50	8.07%
MD	Talbot	1	$31.10	$196.20	15.85%	1	$30.81	16.04%
MD Recap: 92 stores with sales of $3.42 billion. Total retail food sales for MD in the study: $18.96 billion. Giant Food share of MD is 18.03%.								
VA	Albemarle	1	$33.39	$579.70	5.76%	1	$32.44	5.73%
VA	Arlington	4	$114.52	$845.70	13.54%	4	$109.87	13.85%
VA	Fairfax	28	$1,002.29	$4,850.20	20.66%	26	$905.40	19.39%
VA	Fauquier	1	$29.47	$166.30	17.72%	1	$28.49	18.30%
VA	Loudoun	9	$243.56	$1,379.20	17.66%	9	$235.59	18.03%
VA	Prince William	7	$186.08	$1,688.30	11.02%	7	$174.42	10.33%
VA	Spotsylvania	2	$71.11	$693.80	10.25%	2	$67.86	9.95%
VA	Stafford	3	$97.74	$366.20	26.69%	3	$88.17	25.56%
VA Recap: 55 stores with sales of $1.78 billion. Total retail food sales for VA in the study: $21.56 billion. Giant Food share of VA is 8.25%.								

Mid-Atlantic Recap: 158 stores with sales of $5.62 billion annually. Mid-Atlantic retail food sales total: $50.04 billion.
Giant Food Per Store Average: $35.59 million

Source: *Food World*, June 2020


John Carroll


Dan Dosenbach


Brent Bohn

Acosta has announced the appointment of **John Carroll** as chief growth officer, effective June 15, 2020. In this newly created role, Carroll will be responsible for identifying and harnessing opportunities to drive growth for Acosta's current and prospective clients and customers. He will report to Acosta's CEO Darian Pickett and oversee the agency's business development and e-commerce teams.

"John is a well-known industry leader with a reputation for achieving exceptional results, and we are fortunate to have him join the Acosta team," said Darian Pickett, CEO of Acosta. "As the path to purchase becomes increasingly digital, manufacturers and retailers need to evolve their go-to-market strategies in order to win. Providing progressive, shopper-based solutions for both online and offline environments is necessary for a merging physical and digital world. In this new role, John will work with our clients and customers to address deeper shopper preferences and evolving digital purchasing habits and deliver joint-value-building programs to maximize growth and future success for Acosta and our brand and retail partners."

With more than 30 years of experience and success in CPG, food and beverage, and packaging and manufacturing, Carroll has held numerous senior leadership positions in brand, sales, commercial, general management and operations, most recently serving as general manager and vice president of eCommerce for Coca-Cola. In this role, he led the development and overall management of the company's e-commerce vision and roadmap, including commercial and marketing strategies, customer development and new business models. Since retiring from The Coca-Cola Company more than a year ago, Carroll has been helping companies and brands develop inspiring commerce solutions.

Carroll earned a bachelor of science degree in marketing and communications from Florida State University and a certificate in advanced financial management from Emory University. He is the recipient of several prestigious awards for his work including winner of Best Global Advertising for Sprite and Supplier of The Year for several customers.

Albertsons Companies recently announced changes within its labor relations leadership team.

Dan Dosenbach, currently vice president of human resources and labor relations in the company's Acme Markets division, has been appointed to the newly-created role of senior vice president of labor relations. Reporting to Dosenbach in the new role of group vice president of labor relations is **Brent Bohn**, currently vice president of human resources and labor relations for the company's Southern California division.

The new structure was created following Andy Scoggin's retirement from Albertsons after nearly 30 years with the company.

"The partnerships we forge with our unions have always been critical for our business. Those relationships are especially important today, as we prioritize the health of our associates and customers while providing essential services to our neighbors," said Mike Theilmann, EVP and CHRO of Albertsons Companies. "We are grateful for the leadership that Andy Scoggin provided through so many important negotiations, which helped build the collaborative relationships we have today."

"We didn't have to look beyond our own bench to fill these critical roles," Theilmann continued. "Dan Dosenbach and Brent Bohn are exceptional leaders with deep roots in the grocery industry. They bring un-

See **PEOPLE** on page 60

State	County	2020 Stores	2020 Sales (in millions)	2020 County Food Sales	% of 2020 County Market	2019 Stores	2019 Sales (in millions)	% of 2019 County Market
DC	Washington (SuperCenter)	3	$93.70	$2,196.50	4.27%	3	$96.20	4.70%
DC Recap: 3 stores with sales of $93.7 million. Total retail food sales for DC in the study: $2.2 billion. Walmart share of DC is 4.27%.								
DE	Kent (SuperCenter)	2	$55.80	$466.70	11.96%	2	$55.40	11.97%
DE	Sussex (SuperCenter)	4	$119.70	$864.80	13.84%	4	$114.70	13.95%
DE Recap: 6 stores with sales of $175.5 million. Total retail food sales for DE in the study: $1.33 billion. Walmart share of DE is 13.18%.								
MD	Anne Arundel (SuperCenter)	4	$133.20	$2,039.70	6.53%	4	$124.20	5.99%
MD	Baltimore County (SuperCenter)	10	$314.70	$2,929.60	10.74%	10	$295.30	10.39%
MD	Calvert	2	$53.20	$349.70	15.21%	2	$52.70	15.72%
MD	Caroline (SuperCenter)	1	$35.20	$76.20	46.19%	1	$34.80	49.22%
MD	Carroll (SuperCenter)	4	$99.30	$595.40	16.68%	4	$96.10	16.48%
MD	Cecil (SuperCenter)	2	$53.10	$251.60	21.10%	2	$51.90	21.39%
MD	Charles	2	$37.80	$449.80	8.40%	2	$36.10	7.79%
MD	Dorchester (SuperCenter)	1	$23.40	$59.30	39.46%	1	$22.70	39.07%
MD	Frederick (SuperCenter)	2	$95.90	$827.60	11.59%	2	$91.80	11.62%
MD	Harford (SuperCenter)	3	$82.60	$929.60	8.89%	3	$79.90	9.11%
MD	Howard (SuperCenter)	2	$65.80	$1,090.20	6.04%	2	$63.40	6.09%
MD	Montgomery (SuperCenter)	1	$32.90	$3,412.40	0.96%	1	$31.10	0.96%
MD	Prince George's (SuperCenter)	4	$72.10	$2,836.10	2.54%	4	$69.90	2.45%
MD	St. Mary's (SuperCenter)	1	$48.30	$352.60	13.70%	1	$47.20	13.36%
MD	Talbot	1	$19.90	$196.20	10.14%	1	$19.60	10.20%
MD	Washington (SuperCenter)	2	$96.20	$461.20	20.86%	2	$93.60	20.74%
MD	Wicomico (SuperCenter)	2	$66.10	$263.40	25.09%	2	$64.80	25.01%
MD	Worcester (SuperCenter)	2	$67.40	$209.70	32.14%	2	$65.80	32.13%
MD Recap: 46 stores with sales of $1.4 billion. Total retail food sales for MD in the study: $18.96 billion. Walmart share of MD is 7.37%.								
PA	Adams	1	$18.90	$185.10	10.21%	1	$18.30	10.06%
PA	Cumberland (SuperCenter)	4	$104.20	$1,007.50	10.34%	4	$100.70	10.13%
PA	Dauphin (SuperCenter)	2	$71.80	$926.50	7.75%	2	$70.50	7.48%
PA	Franklin (SuperCenter)	2	$73.70	$413.50	17.82%	2	$71.40	18.02%
PA	Lancaster (SuperCenter)	3	$118.70	$1,556.20	7.63%	3	$113.70	7.72%
PA	Lebanon (SuperCenter)	2	$76.90	$379.40	20.27%	2	$75.10	20.51%
PA	York (SuperCenter)	6	$188.60	$1,420.80	13.27%	6	$179.80	13.13%
PA Recap: 20 stores with sales of $652.8 million. Total retail food sales for PA in the study: $4.99 billion. Walmart share of PA is 10.9%.								
VA	Accomack (SuperCenter)	1	$29.90	$85.90	34.81%	1	$28.90	34.49%
VA	Albemarle (SuperCenter)	1	$34.10	$579.70	5.88%	1	$33.40	5.90%
VA	Chesapeake City (SuperCenter)	6	$146.20	$820.40	17.82%	6	$140.30	18.92%
VA	Chesterfield (SuperCenter)	6	$217.40	$1,299.90	16.72%	6	$208.30	16.58%
VA	Culpeper (SuperCenter)	1	$28.40	$140.50	20.21%	1	$27.80	19.63%
VA	Dinwiddie (SuperCenter)	1	$37.30	$123.20	30.28%	1	$35.80	29.32%
VA	Essex (SuperCenter)	1	$36.10	$57.50	62.78%	1	$34.60	63.72%
VA	Fairfax (SuperCenter)	8	$211.30	$4,850.20	4.36%	8	$200.40	4.29%
VA	Fauquier (SuperCenter)	1	$33.90	$166.30	20.38%	1	$33.10	21.26%
VA	Frederick (SuperCenter)	3	$130.60	$457.30	28.56%	3	$121.60	28.31%
VA	Gloucester (SuperCenter)	1	$31.60	$112.90	27.99%	1	$30.80	27.77%
VA	Hampton/Newport News (SC/Neighborhood Mkt)	5	$137.20	$1,049.80	13.07%	5	$130.90	12.94%
VA	Hanover (SC/Neighborhood Mkt)	3	$94.80	$424.30	22.34%	3	$90.10	22.03%
VA	Henrico (SC/Neighborhood Mkt)	7	$250.20	$1,736.30	14.41%	8	$248.30	15.11%
VA	James City (SC/Neighborhood Mkt)	2	$66.50	$381.20	17.44%	2	$64.70	17.52%

IN REVIEW: WALMART

State	County	2020 Stores	2020 Sales (in millions)	2020 County Food Sales	% of 2020 County Market	2019 Stores	2019 Sales (in millions)	% of 2019 County Market
VA	King George (SuperCenter)	1	$31.50	$84.20	37.41%	1	$30.10	36.22%
VA	Lancaster (SuperCenter)	1	$30.70	$79.80	38.47%	1	$29.60	38.34%
VA	Loudoun (SuperCenter)	3	$107.80	$1,379.20	7.82%	3	$103.60	7.93%
VA	Norfolk City (SC/Neighborhood Mkt)	4	$140.70	$718.40	19.59%	4	$134.60	18.72%
VA	Nottoway (SuperCenter)	1	$30.90	$35.80	86.31%	1	$30.40	85.15%
VA	Orange (SuperCenter)	2	$58.40	$109.20	53.48%	2	$56.60	53.60%
VA	Page (SuperCenter)	1	$34.90	$64.80	53.86%	1	$33.70	54.09%
VA	Portsmouth City (SuperCenter)	1	$28.30	$279.10	10.14%	1	$27.50	10.14%
VA	Powhatan (SuperCenter)	1	$34.70	$67.90	51.10%	1	$33.10	50.69%
VA	Prince William (SuperCenter)	5	$105.30	$1,688.30	6.24%	5	$100.60	5.96%
VA	Shenandoah (SuperCenter)	1	$33.00	$108.80	30.33%	1	$31.80	30.96%
VA	Southampton (SuperCenter)	1	$38.30	$83.60	45.81%	1	$36.80	45.21%
VA	Spotsylvania (SuperCenter)	4	$142.10	$693.80	20.48%	4	$137.30	20.12%
VA	Stafford (SuperCenter)	2	$52.20	$366.20	14.25%	2	$50.20	14.55%
VA	Suffolk City (SuperCenter)	2	$66.30	$277.80	23.87%	2	$63.90	24.46%
VA	Virginia Beach (SC/Neighborhood Mkt)	7	$209.40	$1,498.70	13.97%	8	$216.90	14.61%
VA	Warren (SuperCenter)	1	$36.80	$140.20	26.25%	1	$35.70	26.50%
VA	York (SuperCenter)	1	$35.90	$163.70	21.93%	1	$34.40	21.26%

VA Recap: 86 stores with sales of $2.7 billion. Total retail food sales for VA in the study: $21.56 billion. Walmart share of VA is 12.53%.

Mid-Atlantic Recap: 161 stores with sales of $5.02 billion annually. Mid-Atlantic retail food sales total: $50.04 billion.
Walmart Per Store Average: $31.19 million

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

Source: *Food World,* June 2020

FOOD WORLD'S LEADING INDEPENDENTS: 2020

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

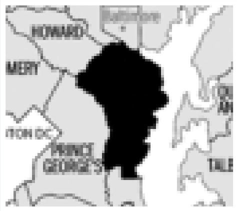
Rank	Company	2020 Supermarkets	2020 (in millions)	2019 Supermarkets	2019 (in millions)	Headquarters	Primary Supplier
1	B. Green (Food Depot/Green Valley/Shoppers Value)	11	$190.30	11	$194.00	Baltimore, MD	UNFI
2	Karns Prime & Fancy Foods	9	$154.00	8	$137.25	Mechanicsburg, PA	UNFI
3	Family Owned Markets	8	$131.10	8	$122.30	Millersville, PA	MDI
4	Balducci's	4	$72.60	4	$72.10	Rockville, MD	Wakefern
5	Streets Market	9	$61.90	7	$49.90	Washington, DC	UNFI
6	Graul's	6	$60.80	6	$59.90	Baltimore, MD	UNFI
7	Kennie's Markets	5	$58.40	5	$57.70	Littlestown, PA	Bozzuto's
8	Sharp Shopper	5	$56.40	3	$29.80	Ephrata, PA	Direct
9	McKay's Food & Drug	3	$46.70	3	$46.50	Hollywood, MD	UNFI
10	Eddie's of Roland Park	2	$34.60	2	$34.00	Baltimore, MD	Bozzuto's
11	Geresbeck's Food Market	3	$31.40	2	$17.10	Baltimore, MD	C&S
12	Roots Markets	2	$20.90	2	$20.60	Clarksville, MD	UNFI
13	Tri-State Co-Op	1	$13.80	4	$28.40	Lindenwold, NJ	UNFI
14	Boyer's Markets	1	$9.51	1	$9.36	Orwigsburg, PA	UNFI
	GRAND TOTAL	**69**	**$942.41**	**66**	**$878.91**		

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

Source: *Food World,* June 2020

MARYLAND COUNTY SHARE OF MARKET: 2020

Total sales for those Maryland counties included in this study are $18.96 billion



ANNE ARUNDEL COUNTY ($2 billion)
(Includes Annapolis, Brooklyn Park, Glen Burnie, Linthicum)

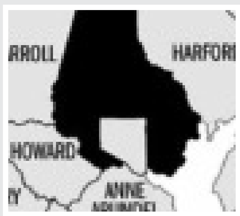
- Population 576,231
- # of households 207,599
- Median income $97,810
- Under age 18...................... 22.2%
- Over age 65........................ 14.7%
- Female 50.5%
- White 67.5%
- Black................................. 17.9%
- Hispanic 8.1%
- Asian................................... 4.2%

Rank	Company	Stores	Sales (in millions)	% of Market
1	Giant Food	9	$393.06	19.35%
2	Safeway	8	$189.43	9.32%
3	Walmart (SuperCenter)	4	$133.20	6.56%
4	CVS+	21	$107.20	5.28%
5	Costco	2	$97.50	4.80%
6	Sam's Club	3	$92.60	4.56%
7	Shoppers	3	$89.80	4.42%
8	Wegmans	1	$81.50	4.01%
9	Target	5	$80.10	3.94%
10	Military Commissaries	2	$72.00	3.54%
11	7-Eleven	39	$63.70	3.14%
12	Food Lion	5	$60.30	2.97%
13	Walgreens	16	$57.40	2.83%
14	Whole Foods	1	$48.90	2.41%
15	Wawa	8	$47.27	2.33%
16	Aldi	5	$40.30	1.98%
17	Weis Markets	3	$39.80	1.96%
18	BJ's Wholesale Club	1	$37.30	1.84%
19	B. Green (Green Valley)	2	$36.00	1.77%
20	Harris Teeter	1	$31.80	1.57%
21	Royal Farm Stores	18	$31.10	1.53%
22	C&S Independents	7	$30.68	1.51%
23	International Markets	2	$28.80	1.42%
24	Geresbeck's Food Market	2	$19.10	0.94%
25	Graul's	2	$18.90	0.93%
26	Trader Joe's	1	$17.20	0.85%
27	Dash-In	9	$15.10	0.74%
28	Fresh Market	1	$14.90	0.73%
29	Great Valu	2	$14.80	0.73%
30	High's/Baltimore	7	$12.20	0.60%
31	Rite Aid	3	$9.20	0.45%
32	Kmart	1	$7.90	0.39%
33	Save-A-Lot	1	$4.70	0.23%
		195	**$2,023.74**	**99.61%**

BALTIMORE CITY ($1.4 billion)

- Population 602,495
- # of households 238,436
- Median income $48,840
- Under age 18...................... 20.4%
- Over age 65........................ 14.0%
- Female 53.1%
- White 27.8%
- Black................................. 62.8%
- Hispanic 5.5%
- Asian................................... 2.8%

Rank	Company	Stores	Sales (in millions)	% of Market
1	Giant Food	6	$235.99	17.25%
2	Walgreens	20	$127.40	9.31%
3	B. Green (Food Depot)	5	$116.00	8.48%
4	7-Eleven	51	$90.70	6.63%
5	CVS+	17	$88.20	6.45%
6	Save-A-Lot	9	$88.20	6.45%
7	Harris Teeter	2	$70.40	5.15%
8	Safeway	3	$69.13	5.05%
9	Whole Foods	2	$61.80	4.52%
10	Rite Aid	13	$53.70	3.92%
11	ShopRite (Klein's/Village/PR)	2	$46.80	3.42%
12	Royal Farm Stores	22	$44.90	3.28%
13	International Markets	6	$42.00	3.07%
14	Shoppers	2	$40.10	2.93%
15	BJ's Wholesale Club	1	$31.90	2.33%
16	Aldi	4	$23.40	1.71%
17	Target	1	$17.70	1.29%
18	MOM's Organic Market	1	$13.80	1.01%
19	Wawa	2	$12.27	0.90%
20	Eddie's of Roland Park	1	$9.80	0.72%
21	Streets Market	1	$6.50	0.48%
22	Great Valu	1	$6.10	0.45%
23	Circle K	2	$3.60	0.26%
24	Dash-In	1	$2.30	0.17%
25	C&S Independents	2	$1.09	0.08%
		177	**$1,303.78**	**95.29%**



BALTIMORE COUNTY ($2.9 billion)
(Includes Catonsville, Dundalk, Randallstown, Reisterstown)

- Population 827,370
- # of households 312,913
- Median income $74,127
- Under age 18...................... 21.6%
- Over age 65........................ 17.2%
- Female 52.6%
- White 56.6%
- Black................................. 29.7%
- Hispanic 5.7%
- Asian................................... 6.3%

Rank	Company	Stores	Sales (in millions)	% of Market
1	Giant Food	14	$484.62	16.54%
2	Walmart (SuperCenter)	10	$314.70	10.74%
3	Weis Markets	12	$230.10	7.85%
4	Sam's Club	3	$168.70	5.76%
5	Wegmans	2	$152.70	5.21%

See **MARYLAND COUNTY SHARE** on page 46

MARYLAND COUNTY SHARE OF MARKET: 2020

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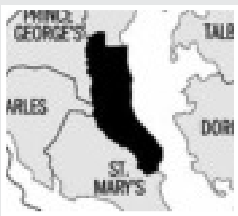
6	Walgreens	26	$142.70	4.87%
7	CVS+	25	$132.70	4.53%
8	International Markets	8	$116.10	3.96%
9	Safeway	6	$109.35	3.73%
10	Costco	2	$105.70	3.61%
11	Shoppers	4	$103.30	3.53%
12	7-Eleven	54	$99.70	3.40%
13	ShopRite (Price Rite)	5	$98.50	3.36%
14	Target	6	$83.90	2.86%
15	Royal Farm Stores	39	$75.30	2.57%
16	Aldi	11	$67.40	2.30%
17	BJ's Wholesale Club	2	$63.40	2.16%
18	Food Lion	6	$53.80	1.84%
19	Rite Aid	9	$41.30	1.41%
20	Wawa	6	$32.80	1.12%
21	Graul's	3	$32.30	1.10%
22	Trader Joe's	2	$31.20	1.06%
23	MOM's Organic Market	2	$27.10	0.93%
24	C&S Independents	3	$26.23	0.90%
25	Eddie's of Roland Park	1	$24.80	0.85%
26	Fresh Market	2	$22.50	0.77%
27	Redner's Markets	1	$21.50	0.73%
28	Sprouts	1	$17.90	0.61%
29	Geresbeck's Food Market	1	$12.30	0.42%
30	Lidl	2	$11.80	0.40%
31	High's/Baltimore	6	$8.30	0.28%
32	Save-A-Lot	2	$5.90	0.20%
33	Circle K	2	$4.40	0.15%
34	Dash-In	2	$4.20	0.14%
		280	**$2,927.20**	**99.92%**



CALVERT COUNTY ($349.7 million)
(Includes Dunkirk, Prince Frederick, Solomons)

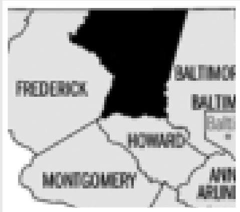
- Population 92,525
- # of households 31,726
- Median income $104,301
- Under age 18...................... 23.2%
- Over age 65........................ 14.9%
- Female 50.4%
- White 78.0%
- Black................................. 13.1%
- Hispanic 4.1%
- Asian.................................. 1.9%

1	Giant Food	3	$127.17	36.37%
2	Walmart (SuperCenter)	2	$53.20	15.21%
3	Safeway	2	$50.79	14.52%
4	Weis Markets	3	$34.60	9.89%
5	Harris Teeter	1	$18.40	5.26%
6	Wawa	2	$15.90	4.55%
7	7-Eleven	7	$13.20	3.77%
8	CVS	3	$13.10	3.75%
9	Walgreens	2	$10.70	3.06%
10	Dash-In	2	$4.10	1.17%
11	Rite Aid	1	$4.10	1.17%
12	C&S Independents	1	$2.25	0.64%
		29	**$347.51**	**99.37%**

CAROLINE COUNTY ($76.2 million)
(Includes Denton, Federalsburg, Greensboro)

- Population 33,406
- # of households 12,081
- Median income $54,956
- Under age 18...................... 23.7%
- Over age 65........................ 16.2%
- Female 51.0%
- White 75.5%
- Black................................. 14.2%
- Hispanic 7.4%
- Asian.................................. 1.2%

1	Walmart (SuperCenter)	1	$35.20	46.19%
2	Food Lion	2	$17.80	23.36%
3	Royal Farm Stores	2	$4.60	6.04%
4	Save-A-Lot	1	$4.60	6.04%
5	7-Eleven	1	$1.90	2.49%
6	Fas-Marts	1	$1.80	2.36%
		8	**$65.90**	**86.5%**



CARROLL COUNTY ($595.4 million)
(Includes Eldersburg, Manchester, Taneytown, Westminster)

- Population 168,447
- # of households 60,450
- Median income $93,363
- Under age 18...................... 21.7%
- Over age 65........................ 16.8%
- Female 50.5%
- White 88.7%
- Black................................... 3.8%
- Hispanic 3.7%
- Asian.................................. 2.0%

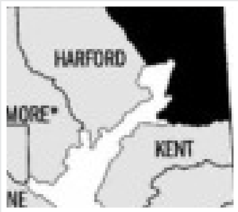
1	Walmart (SuperCenter)	4	$99.30	16.68%
2	Safeway	3	$83.18	13.97%
3	Weis Markets	5	$81.00	13.60%
4	The Giant Company (Martin's)	1	$63.62	10.69%
5	Food Lion	3	$37.40	6.28%
6	BJ's Wholesale Club	1	$36.90	6.20%
7	Giant Food	1	$32.44	5.45%
8	CVS+	5	$25.10	4.22%
9	Shoppers	1	$19.60	3.29%
10	Walgreens	4	$18.20	3.06%
11	Kennie's Markets	1	$13.20	2.22%
12	High's/Baltimore	8	$13.10	2.20%
13	Rite Aid	4	$11.70	1.97%
14	Target	1	$11.70	1.97%
15	Wawa	2	$10.60	1.78%
16	7-Eleven	7	$10.10	1.70%

See **MARYLAND COUNTY SHARE** on page 48

MARYLAND COUNTY SHARE OF MARKET: 2020

Continued from page 46

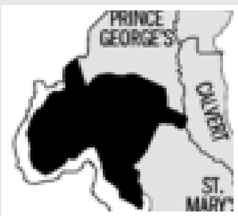
17	Sheetz	3	$8.90	1.49%
18	Aldi	1	$7.70	1.29%
19	Royal Farm Stores	3	$7.10	1.19%
20	C&S Independents	1	$1.46	0.25%
		59	**$592.30**	**99.48%**



CECIL COUNTY ($251.6 million) (Includes Elkton, Northeast)

- Population 102,885
- # of households 36,930
- Median income $72,845
- Under age 18...................... 22.6%
- Over age 65........................ 15.7%
- Female 50.4%
- White 84.9%
- Black.................................... 7.2%
- Hispanic 4.6%
- Asian.................................... 1.5%

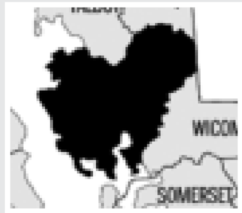
1	Walmart (SuperCenter)	2	$53.10	21.10%
2	The Giant Company (Martin's)	1	$48.92	19.44%
3	Food Lion	3	$29.10	11.57%
4	Redner's Markets	1	$22.90	9.10%
5	Wawa	3	$20.90	8.31%
6	Acme Markets	1	$16.80	6.68%
7	Royal Farm Stores	8	$16.10	6.40%
8	Walgreens	3	$12.30	4.89%
9	Aldi	1	$7.40	2.94%
10	7-Eleven	4	$6.10	2.42%
11	High's/Baltimore	4	$5.10	2.03%
12	CVS	1	$4.50	1.79%
13	Rite Aid	1	$3.50	1.39%
14	Fas-Marts	1	$1.70	0.68%
		34	**$248.42**	**98.74%**



CHARLES COUNTY ($449.8 million) (Includes Bryan's Road, Waldorf)

- Population 163,257
- # of households 55,903
- Median income $95,924
- Under age 18...................... 24.0%
- Over age 65........................ 12.5%
- Female 51.8%
- White 38.6%
- Black.................................... 49.0%
- Hispanic 6.0%
- Asian.................................... 3.4%

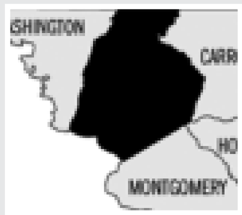
1	Safeway	3	$79.58	17.69%
2	Giant Food	2	$70.45	15.66%
3	Walmart	2	$37.80	8.40%
4	CVS+	8	$37.70	8.38%
5	Food Lion	3	$34.90	7.76%
6	BJ's Wholesale Club	1	$33.20	7.38%
7	Sam's Club	1	$30.20	6.71%
8	Target	2	$23.40	5.20%
9	7-Eleven	10	$20.40	4.54%
10	Wawa	3	$17.00	3.78%
11	Walgreens	3	$14.60	3.25%
12	Dash-In	9	$13.10	2.91%
13	MOM's Organic Market	1	$12.20	2.71%
14	Weis Markets	1	$9.40	2.09%
15	Lidl	1	$7.60	1.69%
16	C&S Independents	2	$1.27	0.28%
		52	**$442.80**	**98.44%**



DORCHESTER COUNTY ($59.3 million) (Includes Cambridge)

- Population 31,929
- # of households 13,264
- Median income $52,145
- Under age 18...................... 21.1%
- Over age 65........................ 21.6%
- Female 52.5%
- White 62.6%
- Black.................................... 29.0%
- Hispanic 5.9%
- Asian.................................... 1.2%

1	Walmart (SuperCenter)	1	$23.40	39.46%
2	Food Lion	1	$10.90	18.38%
3	Wawa	1	$6.30	10.62%
4	Save-A-Lot	1	$6.20	10.46%
5	Walgreens	1	$4.90	8.26%
6	Rite Aid	1	$3.80	6.41%
7	Royal Farm Stores	1	$2.40	4.05%
		7	**$57.90**	**97.64%**



FREDERICK COUNTY ($827.6 million) (Includes Brunswick, Emmitsburg, Frederick, Thurmont)

- Population 259,547
- # of households 91,405
- Median income $91,999
- Under age 18...................... 23.1%
- Over age 65........................ 14.5%
- Female 50.7%
- White 72.7%
- Black.................................... 10.4%
- Hispanic 10.2%
- Asian.................................... 4.8%

1	Weis Markets	6	$112.90	13.70%
2	Giant Food	3	$101.69	12.34%
3	Walmart (SuperCenter)	2	$95.90	11.64%
4	Wegmans	1	$66.00	8.01%
5	CVS+	13	$64.20	7.79%
6	Food Lion	5	$62.40	7.57%
7	Costco	1	$47.60	5.78%
8	Giant Eagle	4	$36.10	4.38%
9	Safeway	2	$28.99	3.52%
10	Sam's Club	1	$28.10	3.41%
11	Walgreens	5	$23.70	2.88%
12	Aldi	2	$19.80	2.40%
13	Sheetz	6	$18.90	2.29%
14	Wawa	3	$15.40	1.87%

See **MARYLAND COUNTY SHARE** on page 50

MARYLAND COUNTY SHARE OF MARKET: 2020

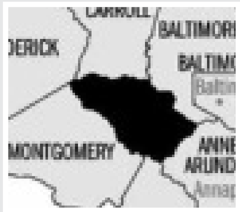
Continued from page 48

15	7-Eleven	11	$14.80	1.80%
16	International Markets	1	$12.50	1.52%
17	Royal Farm Stores	4	$12.50	1.52%
18	MOM's Organic Market	1	$12.10	1.47%
19	Target	1	$11.90	1.44%
20	Military Commissaries	1	$9.55	1.16%
21	Great Valu	1	$8.20	0.99%
22	C&S Independents	2	$6.15	0.75%
23	High's/Baltimore	4	$5.90	0.72%
24	Kmart	1	$3.70	0.45%
25	Rutter's Farm Stores	1	$2.30	0.28%
26	Circle K	1	$2.00	0.24%
27	Dash-In	1	$1.90	0.23%
		84	**$825.18**	**100.12%***

HARFORD COUNTY ($929.6 million) (Includes Aberdeen, Bel Air, Havre de Grace)

- Population 255,441
- # of households 93,289
- Median income $85,942
- Under age 18...................... 22.2%
- Over age 65........................ 16.2%
- Female 51.0%
- White 75.5%
- Black.................................. 14.5%
- Hispanic 4.7%
- Asian.................................... 3.1%

1	ShopRite (Klein's)	6	$194.60	20.93%
2	Wegmans	1	$83.90	9.03%
3	Walmart (SuperCenter)	3	$82.60	8.89%
4	Giant Food	2	$66.06	7.11%
5	Wawa	9	$51.80	5.57%
6	Walgreens	11	$51.70	5.56%
7	Target	3	$42.60	4.58%
8	BJ's Wholesale Club	1	$37.40	4.02%
9	Weis Markets	2	$36.90	3.97%
10	CVS+	8	$32.10	3.45%
11	Royal Farm Stores	14	$30.70	3.30%
12	Redner's Markets	2	$29.80	3.21%
13	Safeway	1	$26.29	2.83%
14	7-Eleven	18	$25.10	2.70%
15	Family Owned Markets	1	$22.40	2.41%
16	Aldi	3	$18.30	1.97%
17	Save-A-Lot	3	$17.50	1.88%
18	Sprouts	1	$15.30	1.65%
19	Rite Aid	5	$14.30	1.54%
20	Military Commissaries	1	$13.38	1.44%
21	High's/Baltimore	7	$11.40	1.23%
22	Food Lion	2	$9.90	1.06%
23	Lidl	1	$8.30	0.89%
24	Sheetz	1	$3.20	0.34%
25	C&S Independents	1	$0.69	0.07%
		107	**$926.22**	**99.64%**



HOWARD COUNTY ($1.1 billion) (Includes Columbia, Ellicott City, Laurel)

- Population 325,690
- # of households 112,966
- Median income $117,730
- Under age 18...................... 24.4%
- Over age 65........................ 13.8%
- Female 51.1%
- White 51.1%
- Black.................................. 20.0%
- Hispanic 7.1%
- Asian.................................. 19.1%

1	Giant Food	7	$266.57	24.45%
2	Harris Teeter	3	$98.10	9.00%
3	Wegmans	1	$95.10	8.72%
4	Weis Markets	4	$66.70	6.12%
5	Walmart (SuperCenter)	2	$65.80	6.04%
6	Safeway	3	$63.83	5.85%
7	International Markets	3	$51.10	4.69%
8	Costco	1	$50.10	4.60%
9	CVS+	10	$41.80	3.83%
10	Target	2	$35.20	3.23%
11	Whole Foods	1	$34.10	3.13%
12	BJ's Wholesale Club	1	$30.00	2.75%
13	Trader Joe's	1	$25.30	2.32%
14	Walgreens	5	$25.10	2.30%
15	B. Green (Green Valley)	1	$21.00	1.93%
16	Food Lion	2	$19.70	1.81%
17	Sprouts	1	$18.40	1.69%
18	7-Eleven	10	$15.30	1.40%
19	MOM's Organic Market	1	$13.40	1.23%
20	Aldi	1	$10.90	1.00%
21	Roots Markets	1	$10.60	0.97%
22	High's/Baltimore	8	$10.40	0.95%
23	Royal Farm Stores	5	$10.20	0.94%
24	Rite Aid	1	$4.10	0.38%
25	Circle K	2	$3.50	0.32%
26	Dash-In	1	$1.90	0.17%
		78	**$1,088.20**	**99.82%**

See **MARYLAND COUNTY SHARE** on page 52

MARYLAND COUNTY SHARE OF MARKET: 2020

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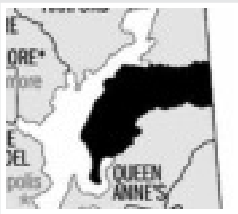
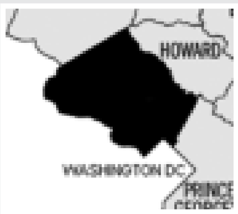


KENT COUNTY ($95.8 million)
(Includes Chestertown, Worton)

- Population 19,422
- # of households 7,910
- Median income $56,009
- Under age 18...................... 15.8%
- Over age 65........................ 26.7%
- Female 52.3%
- White 78.0%
- Black................................. 15.0%
- Hispanic 4.3%
- Asian.................................. 1.4%

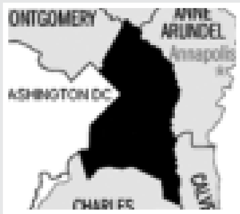
1	Redner's Markets	1	$22.40	23.38%
2	Walgreens	2	$19.90	20.77%
3	Acme Markets	1	$16.70	17.43%
4	Food Lion	1	$14.00	14.61%
5	Lidl	1	$6.20	6.47%
6	Royal Farm Stores	2	$4.90	5.11%
7	C&S Independents	2	$4.29	4.48%
8	7-Eleven	1	$2.50	2.61%
9	Fas-Marts	1	$1.70	1.77%
10	High's/Baltimore	1	$1.70	1.77%
		13	**$94.29**	**98.42%**



MONTGOMERY COUNTY ($3.4 billion)
(Includes Bethesda, Gaithersburg, Germantown, Rockville)

- Population 1,050,688
- # of households 370,227
- Median income $106,287
- Under age 18...................... 23.2%
- Over age 65........................ 15.5%
- Female 51.6%
- White 43.4%
- Black................................. 19.9%
- Hispanic 19.9%
- Asian................................. 15.6%

1	Giant Food	26	$1,046.43	30.67%
2	CVS+	46	$426.50	12.50%
3	Safeway	18	$389.29	11.41%
4	International Markets	19	$285.20	8.36%
5	Whole Foods	5	$207.20	6.07%
6	Harris Teeter	7	$159.20	4.67%
7	Costco	2	$147.40	4.32%
8	7-Eleven	68	$134.20	3.93%
9	Trader Joe's	4	$101.60	2.98%
10	Target	6	$97.60	2.86%
11	Wegmans	1	$90.20	2.64%
12	Walgreens	11	$59.60	1.75%
13	Aldi	5	$38.20	1.12%
14	Sam's Club	1	$38.20	1.12%
15	Walmart	1	$32.90	0.96%
16	Weis Markets	3	$32.00	0.94%
17	MOM's Organic Market	2	$31.20	0.91%
18	ShopRite (Village)	1	$24.90	0.73%
19	Balducci's	1	$20.70	0.61%
20	Fresh Market	1	$15.10	0.44%
21	Roots Markets	1	$10.30	0.30%
22	Food Lion	1	$10.10	0.30%
23	Military Commissaries	1	$9.35	0.27%
24	Kmart	1	$6.00	0.18%
25	Circle K	1	$2.10	0.06%
26	Dash-In	1	$2.00	0.06%
27	C&S Independents	3	$1.72	0.05%
		237	**$3,419.19**	**100.2%***



PRINCE GEORGE'S COUNTY ($2.8 billion)
(Includes Bowie, Clinton, College Park, Hyattsville, Laurel, Oxon Hill)

- Population 909,327
- # of households 308,849
- Median income $81,969
- Under age 18...................... 22.2%
- Over age 65........................ 13.3%
- Female 51.9%
- White 12.5%
- Black................................. 65.4%
- Hispanic 19.1%
- Asian.................................. 4.5%

1	Giant Food	17	$534.03	18.83%
2	International Markets	22	$321.30	11.33%
3	CVS+	49	$253.60	8.94%
4	Shoppers	9	$243.70	8.59%
5	Safeway	9	$208.10	7.34%
6	Target	9	$169.70	5.98%
7	Costco	3	$150.60	5.31%
8	7-Eleven	81	$143.50	5.06%
9	Wegmans	1	$87.30	3.08%
10	Aldi	11	$80.40	2.83%
11	Walmart	4	$72.10	2.54%
12	BJ's Wholesale Club	2	$70.20	2.48%
13	Walgreens	12	$63.40	2.24%
14	Military Commissaries	1	$47.86	1.69%
15	ShopRite (Price Rite)	2	$39.50	1.39%
16	Food Lion	3	$36.80	1.30%
17	Harris Teeter	2	$34.30	1.21%
18	Weis Markets	3	$33.30	1.17%
19	Lidl	4	$31.70	1.12%
20	Whole Foods	1	$30.30	1.07%
21	MOM's Organic Market	2	$26.90	0.95%
22	Wawa	4	$26.50	0.93%
23	Save-A-Lot	5	$22.10	0.78%
24	Royal Farm Stores	7	$19.80	0.70%
25	Dash-In	8	$15.90	0.56%
26	C&S Independents	5	$10.41	0.37%
27	Kmart	1	$5.80	0.20%

See **MARYLAND COUNTY SHARE** on page 54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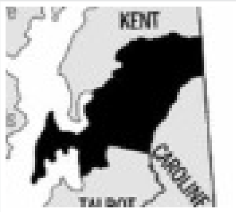
MARYLAND COUNTY SHARE OF MARKET: 2020

Continued from page 52

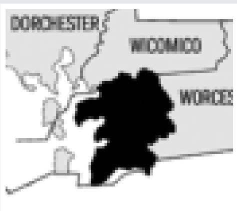
28	XtraMart	2	$4.30	0.15%
29	Circle K	1	$1.70	0.06%
		280	**$2,785.10**	**98.20%**



QUEEN ANNE'S COUNTY ($130.6 million)
(Includes Centreville, Chester, Stevensville)

- Population 50,381
- # of households 18,148
- Median income $92,167
- Under age 18...................... 21.5%
- Over age 65........................ 18.8%
- Female 50.4%
- White 86.3%
- Black.................................. 6.4%
- Hispanic 4.1%
- Asian................................... 1.2%

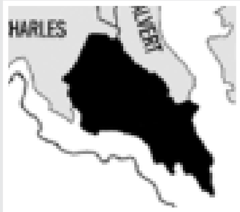
1	Safeway	1	$39.84	30.51%
2	Food Lion	2	$20.90	16.00%
3	Acme Markets	1	$15.30	11.72%
4	Walgreens	2	$11.40	8.73%
5	7-Eleven	4	$8.30	6.36%
6	Royal Farm Stores	3	$7.90	6.05%
7	Kmart	1	$6.10	4.67%
8	CVS	1	$5.30	4.06%
9	Wawa	1	$4.40	3.37%
10	Fas-Marts	2	$3.50	2.68%
11	Rite Aid	1	$3.30	2.53%
12	Dash-In	1	$2.00	1.53%
		20	**$128.24**	**98.19%**



SOMERSET COUNTY ($38.9 million)
(Includes Crisfield)

- Population 25,616
- # of households 8,383
- Median income $42,165
- Under age 18...................... 17.1%
- Over age 65........................ 17.0%
- Female 45.9%
- White 51.4%
- Black.................................. 42.0%
- Hispanic 3.6%
- Asian................................... 0.9%

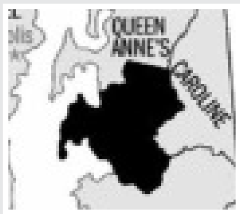
1	Food Lion	2	$23.30	59.90%
2	Rite Aid	1	$2.90	7.46%
3	Royal Farm Stores	1	$2.40	6.17%
4	Dash-In	1	$2.10	5.40%
5	Fas-Marts	1	$1.80	4.63%
		6	**$32.50**	**83.55%**



ST. MARY'S COUNTY ($352.6 million)
(Includes Charlotte Hall, Leonardtown, Lexington Park)

- Population 113,510
- # of households 40,332
- Median income $90,438
- Under age 18...................... 24.2%
- Over age 65........................ 13.1%
- Female 50.2%
- White 73.9%
- Black.................................. 14.7%
- Hispanic 5.3%
- Asian................................... 2.9%

1	Walmart (SuperCenter)	1	$48.30	13.70%
2	McKay's Food & Drug	3	$46.70	13.24%
3	BJ's Wholesale Club	1	$34.30	9.73%
4	Giant Food	1	$30.43	8.63%
5	Weis Markets	2	$27.80	7.88%
6	Wawa	4	$27.40	7.77%
7	Food Lion	2	$25.90	7.35%
8	Harris Teeter	1	$23.50	6.66%
9	Military Commissaries	1	$18.37	5.21%
10	CVS	5	$18.20	5.16%
11	Walgreens	3	$13.80	3.91%
12	Target	1	$13.60	3.86%
13	Aldi	1	$6.80	1.93%
14	Sheetz	2	$5.90	1.67%
15	7-Eleven	2	$4.00	1.13%
16	Dash-In	2	$3.50	0.99%
17	C&S Independents	1	$0.22	0.06%
		33	**$348.72**	**98.90%**



TALBOT COUNTY ($196.2 million)
(Includes Easton, St. Michael's)

- Population 37,181
- # of households 16,627
- Median income $67,204
- Under age 18...................... 18.2%
- Over age 65........................ 29.2%
- Female 52.8%
- White 77.7%
- Black.................................. 12.9%
- Hispanic 6.8%
- Asian................................... 1.4%

1	BJ's Wholesale Club	1	$31.10	15.85%
2	Giant Food	1	$31.10	15.85%
3	Harris Teeter	1	$23.10	11.77%
4	Walmart (SuperCenter)	1	$19.90	10.14%
5	Acme Markets	1	$19.20	9.79%
6	Target	1	$15.30	7.80%
7	Graul's	1	$9.60	4.89%
8	Weis Markets	1	$7.90	4.03%
9	Aldi	1	$7.10	3.62%
10	CVS+	2	$7.10	3.62%
11	Wawa	1	$5.30	2.70%
12	Walgreens	1	$4.60	2.34%
13	High's/Baltimore	2	$3.40	1.73%
14	Royal Farm Stores	1	$2.70	1.38%

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MARYLAND COUNTY SHARE OF MARKET: 2020

Continued from page 54

15	Rite Aid	1	$2.60	1.33%
16	Fas-Marts	1	$1.90	0.97%
17	7-Eleven	1	$1.80	0.92%
		19	**$193.70**	**98.73%**

WASHINGTON COUNTY ($461.2 million)
(Includes Fountainhead, Hagerstown, Hancock)

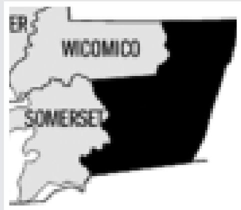
- Population 151,049
- # of households 55,684
- Median income $59,719
- Under age 18..................... 21.8%
- Over age 65....................... 17.2%
- Female 49.1%
- White 78.2%
- Black.................................. 12.1%
- Hispanic 5.4%
- Asian................................... 1.9%

1	The Giant Company (Martin's)	4	$141.61	30.70%
2	Walmart (SuperCenter)	2	$96.20	20.86%
3	Weis Markets	3	$56.50	12.25%
4	Sam's Club	1	$34.30	7.44%
5	Sheetz	8	$27.90	6.05%
6	CVS+	7	$20.80	4.51%
7	Walgreens	4	$19.30	4.18%
8	Save-A-Lot	2	$12.30	2.67%
9	Target	1	$12.20	2.65%
10	Food Lion	1	$10.40	2.25%
11	Aldi	1	$6.80	1.47%
12	C&S Independents	5	$6.58	1.43%
13	7-Eleven	3	$5.40	1.17%
14	High's/Baltimore	2	$3.80	0.82%
		44	**$454.09**	**98.46%**

WICOMICO COUNTY ($263.4 million)
(Includes Fruitland, Salisbury)

- Population 106,609
- # of households 37,637
- Median income $56,608
- Under age 18..................... 22.0%
- Over age 65....................... 15.9%
- Female 52.6%
- White 62.3%
- Black.................................. 27.1%
- Hispanic 5.4%
- Asian................................... 3.1%

1	Walmart (SuperCenter)	2	$66.10	25.09%
2	Food Lion	4	$34.70	13.17%
3	Acme Markets	1	$32.90	12.49%
4	Sam's Club	1	$32.00	12.15%
5	Royal Farm Stores	7	$15.80	6.00%
6	Rite Aid	4	$14.50	5.50%
7	Target	1	$12.50	4.75%
8	Wawa	2	$10.32	3.92%
9	Aldi	1	$9.80	3.72%
10	Walgreens	2	$9.50	3.61%
11	Fas-Marts	4	$7.10	2.70%
12	CVS+	2	$6.50	2.47%
13	Save-A-Lot	1	$4.50	1.71%
14	7-Eleven	1	$2.10	0.80%
15	Dash-In	1	$2.00	0.76%
		34	**$260.32**	**98.83%**



WORCESTER COUNTY ($209.7 million)
(Includes Ocean City, Pocomoke City, Snow Hill)

- Population 52,276
- # of households 21,672
- Median income $61,145
- Under age 18...................... 17.2%
- Over age 65........................ 27.8%
- Female 51.5%
- White 80.1%
- Black.................................. 13.1%
- Hispanic 3.6%
- Asian................................... 1.5%

1	Walmart (SuperCenter)	2	$67.40	32.14%
2	Food Lion	4	$56.80	27.09%
3	CVS	3	$17.40	8.30%
4	Rite Aid	5	$15.80	7.53%
5	Acme Markets	1	$12.80	6.10%
6	7-Eleven	7	$11.40	5.44%
7	Wawa	2	$9.80	4.67%
8	Royal Farm Stores	3	$8.40	4.01%
9	C&S Independents	7	$7.03	3.35%
10	Walgreens	1	$5.80	2.77%
11	Fas-Marts	1	$1.90	0.91%
		36	**$214.53**	**102.3%***

( ) 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.

+ Stand-alone CVS and in-Target pharmacies

Source: *Food World,* June 2020

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same: price, price, price. Walmart had strong comps for the first 11 months of our measuring period, and like many other retailers had an outstanding March, despite surprising higher than expected out-of-stocks (when compared to others in the B-W market). Don't expect any new store movement over the next few years either, but the planet's largest merchant proved that investment in upgrading its e-commerce platform coupled with a strong physical store base has yielded big benefits.

Harris Teeter – Another steady year for the upscale division of Kroger. For the first time in more than a decade, no new stores opened, but Harris Teeter had solid comps, both pre-COVID and in March (especially the last three weeks). The Matthews, NC-based regional chain does have new stores slated for Washington, DC (Howard University); Arlington, VA; Stafford, VA; and Kent Island, MD. It's been 22 years since HT entered the B-W market (ostensibly to offer shoppers a more customer-service oriented experience after Giant was sold to Ahold) and it has created a solid and loyal customer base, particularly in DC and Northern Virginia. But Harris Teeter has already learned how difficult it can be when competing with the Goliath of upscale oriented customer service in Wegmans, and now Giant, with superior locations, is ready to take back some of those customers it lost earlier this decade.

Wegmans – Wegmans' future challenges have been documented earlier in this story. As for the past 12 months, it was an excellent campaign for the Rochester, NY-based uber-retailer. Although no new stores opened in the Baltimore-Washington market, Wegmans continued to dominate all supermarket retailers in sales on a per store average basis. And the new store pipeline remains very active in the market with mega-stores planned for DC (Wisconsin Avenue NW); Rockville, MD; Alexandria, VA; Arcola, VA; Reston, VA; and Tysons Corner, VA. Additionally, Wegmans is building its third distribution center near Richmond, which will improve efficiency to its stores in Old Dominion as well as its North Carolina expansion where six stores are planned (one opened last year). Never bet against these guys.

Shoppers – It's almost like the associates who work at Shoppers' remaining 24 stores are being held hostage by their own parent firm (reverse Stockholm Syndrome?) UNFI, which has been openly attempting to sell the once-proud regional chain for nearly two years. But wait, that probably won't happen for another 12-18 months, because company CEO Steve "Senor Spinmeister" Spinner said it would be "immoral" to sell and potentially create a food desert during this high time of demand. Shortly after that announcement, UNFI decided it would spin-off both Shoppers and its larger retail entity, Cub Foods, into a separate operating unit (likely so they won't blemish future earnings). The false altruism of the Spinmeister is disingenuous enough, but how difficult must it be for the thousands of clerks and meatcutters who still work at the company's stores to know that being a lame duck is almost an endless journey into no-man's land. Almost endless - until they receive their WARN notices.

At Ahold Delhaize USA: A New Acquisition, An Uncoupling And More Vendor Relations Issues

First there's this: earlier this month, Food Lion, a division of Ahold Delhaize USA (ADUSA), announced that it has reached an agreement with Southeastern Grocers (SEG) to purchase 62 Bi-Lo/Harveys supermarkets (46 Bi-Los and 16 Harveys units) in North Carolina, South Carolina and Georgia. The stores will remain open as Bi-Lo and Harveys Supermarkets until the transaction is complete, which is expected to take place over a staggered period from January to April 2021, pending regulatory approval and customary closing requirements. The deal also includes Bi-Lo's primary distribution center in Mauldin, SC which will supply the acquired stores. Food Lion said it hopes to hire approximately 4,650 associates when the acquisition is completed. Financial terms of the transaction were not released.

When the deal is completed, parent company SEG will operate 61 Bi-Lo units in Georgia, North Carolina and Florida and 30 Harveys Supermarkets in Georgia, Florida, North Carolina and South Carolina.

"We are so excited to add these new locations to our more than 630 stores across Georgia and the Carolinas," said Food Lion president Meg Ham. "We've

TAKING STOCK continues on page 60

Thank you, retai
AFFINITY
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Join us in thanking our retail partners and all
brave, hard-working store associates for keep
families, neighbors and team members safe, s
and well fed during these uncertain time


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Nathan's FAMOUS
Original Bagel
Quaker Maid
Raymundo's
Handcrafted in Small Batches
Smithfield
SCHUMAN CHEESE
Steak-umm
TREELINE
TREENUT CHEESE
wahlburgers

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paralleled labor relations experience to the team, along with a genuine concern and appreciation for the frontline teams that serve customers every day. We thank Andy for mentoring and developing leaders like Dan and Brent. "

Dosenbach joined the grocery industry in 2006 as a director of labor relations at Supervalu, after serving as general counsel for United Food & Commercial Workers Union Local 1546 in Chicago. He was promoted to vice president of labor relations in 2011, and joined Albertsons in 2013 when Acme Markets was acquired. At that time, he was named to his most recent role of vice president of human resources and labor relations. Dosenbach has a B.S. in chemistry from Illinois Benedictine College and received his J.D. from Chicago Kent College of Law.

Bohn started with Albertsons in 1999 as the director of labor relations for the Southern California division. In 2007, he was promoted to vice president of labor relations with responsibilities for multiple divisions, including Southern California, Portland, Seattle, and Intermountain. In 2013, he was promoted to his most recent role of vice president of labor relations and human resources, with responsibilities for human resources, labor relations and employment jaw. Before joining Albertsons, Bohn was at the law firm Paul, Hastings, Janofsky & Walker. He received a B.A. from the University of California, Berkeley and a J.D. from Loyola Marymount University.

Ryan Youngman

Crispy Green Inc. announced that it has brought **Ryan Youngman** on as its new chief sales officer. In his new position, he will be responsible for providing strategy and leadership on growing the company's sales and distribution network for 2020 and beyond.

Youngman previously held leadership roles in retail, with Whole Foods, and distribution, with UNFI. He also held positions with Brad's Raw Foods and Fresca Foods.

Angela Liu, CEO and founder of Crispy Green, said, "Much of Ryan's career has been in natural food industry working on both sides of the table. His unique experience combined with his entrepreneurial spirit is a perfect fit for Crispy Green at this crucial time. We're excited to have him join our team, and are confident he will provide leadership, industry insight, key relationships and invaluable sales experience to enhance our growth initiatives."

TAKING STOCK

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been serving customers in these larger regions for almost 60 years. We're thrilled to add these locations and serve even more towns and cities across these three states with fresh, quality products at affordable prices every day with the caring, friendly service customers expect from their local Food Lion."

With the acquisition, Food Lion will operate nearly 1,100 stores from Pennsylvania to Florida which will employ more than 80,000 associates.

For Southeastern Grocers, which is led by former Giant Food president Anthony "Slick" Hucker, the move allows the Jacksonville, FL-based retailer to place more focus on its five-year growth plan. SEG, which entered bankruptcy in March 2018 and emerged from its Chapter 11 status two months later, said it will now focus on its Winn-Dixie, Fresco y Más and remaining Harveys stores. It added that it is also actively exploring strategic options for the rest of Bi-Lo's stores, including other potential transactions.

Separately, SEG is also divesting the assets of 57 of the in-store pharmacies it operates under the Bi-Lo and Harveys Supermarket banners to CVS and Walgreens. These locations, which include all of the retailer's Bi-Lo pharmacies and nine Harveys Supermarket pharmacies in Georgia, will begin to transition within the next two weeks. During this process, SEG said it will seek to minimize any interruption to customers and to ensure the smooth transition of their prescriptions.

CEO Hucker stated: "The successful execution of our long-term transformation strategy may at times require difficult decisions. Today's transactions are a critical strategic move and an important next step for our continued growth and broader evolution as a business. These actions will facilitate greater investment in our remaining footprint so we can continue to provide an exceptional shopping experience our customers can always count on."

Southeastern Grocers also noted that these transactions build on previous announcements made by the company such as the opening of a new store earlier this year and the acquisition of eight new store locations from Lucky's Market and Earth Fare – as part of its business transformation strategy to strengthen its overall performance in an increasingly competitive sector.

Then there's this: On June 10, Stop & Shop and King Kullen announced that they have terminated their merger agreement through which Stop & Shop was to acquire King Kullen. A joint decision was made not to proceed with the acquisition because of significant, unforeseen changes in the marketplace that have emerged since the agreement was signed in December 2018, largely driven by the COVID-19 pandemic.

"Both companies have put forth an incredible amount of effort to work through unanticipated challenges that have arisen, and we regret that we're not able to move forward. King Kullen has a strong legacy on the island, and we wish them continued success," said Gordon Reid, president of Stop & Shop. "Stop & Shop remains committed to the Long Island community, to serving our customers in the market well, and to investing in our associates and our stores in Nassau and Suffolk Counties."

Brian Cullen, co-president of King Kullen, stated, "We look forward to continuing to focus on what we do best — serving our great customers across Long Island and supporting our hard-working store associates. We are enthusiastic about the future and well-positioned to serve Nassau and Suffolk Counties for many years to come. In short, we are here for the long term."

However, multiple sources have told us that the role of the Federal Trade Commission, which reportedly sought to force Stop & Shop to divest more stores than the company had originally intended (due to anti-competitive concerns), was a factor in the final decision.

In a memo to the trade, SVP and chief merchandising officer for King Kullen Joe Brown said, "As you may be aware, King Kullen has decided not to sell our company. Our public statements address all that is needed in regard to our decision to remain in business as a family and management owned company for the foreseeable future." He continued, "The intent of this memo is to directly inform our vendor partners of our intent to build and strengthen the equity of the King Kullen brand. We understand that it is no longer 'business as usual,' it is something far different than that. Along with the technological, cultural, and social changes we see from consumers, we see our need for internal structural and cultural changes in our approach to how we run our business."

The deal, originally announced by Ahold Delhaize in early January 2019, was for Stop & Shop, its largest brand in the United States, to acquire King

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From page 16

Web: graulsmarket.com
Officers/Buyers: Harold Graul Jr., Fred Graul, Thomas Graul, John Evans, Dennis Graul
Primary Supplier: UNFI
FW Stores: 6
FW Vol.: $60.8 million

Great Valu Supermarkets
8258 Richfood Rd.
Mechanicsville, VA 23116
Phone: (804) 746-6000
Web: greatvalu.com
FW Stores: 14
FW Vol.: $111.6 million
*This is the advertising and marketing arm that serves a group of independents that are supplied by UNFI.

Grocery Outlet
5650 Hollis St.
Emeryville, CA 94608
Phone: (510) 845-1999
Web: groceryoutlet.com
Vice Chmn.: MacGregor Read
CEO: Eric Lindberg
Pres. RJ Sheedy
Primary Supplier: Direct
FW Stores: 10
FW Vol.: $62.1 million

Harris Teeter
Div. of Kroger
P.O. Box 10100
Matthews, NC 28105
Phone: (704) 845-3100
Web: harristeeter.com
Pres.: Rod Antolock
Primary Supplier: Direct
FW Stores: 79
FW Vol.: $2.1 billion

IGA
275 Schoolhouse Rd.
Cheshire, CT 06410
Phone: (203) 272-3511
Primary Supplier: Bozzuto's
FW Stores: 2
FW Vol.: $14.7 million
*This is the group of independent retailers that operate under the IGA banner and are supplied by Bozzuto's and supervised from its Cheshire, CT headquarters.

Karns Quality Food Ltd.
675 Silver Spring Rd.
Mechanicsburg, PA 17050
Phone: (717) 766-6477
Web: karnsfoods.com
CEO/Pres.: D. Scott Karns
Primary Supplier: UNFI
FW Stores: 9
FW Vol.: $154 million

Kennie's
520 West King St.
Littlestown, PA 17340
Phone: (717) 359-9001
Web: kenniesmarket.com
CEO: P.K. Hoover
Primary Supplier: Bozzuto's
FW Stores: 5
FW Vol.: $58.4 million

Kroger
Mid-Atlantic Div.
3631 Peters Creek Rd. NW
Roanoke, VA 24019
Phone: (540) 563-3500
Web: kroger.com
CEO: Rodney McMullen
Pres.-Mid-Atlantic Div.: Paula Ginnett
Primary Supplier: Direct
FW Stores: 41 (Includes Marketplace)
FW Vol.: $1.23 billion

Lidl U.S.
3500 S. Clark St.
Arlington, VA 22202
Phone: (571) 398-5435
Chmn. Lidl USA: Roman Heini
Pres.: Johannes Fieber
EVP/Chief Commercial Officer: Boudewijn Tiktak
Primary Supplier: Direct
FW Stores: 38
FW Vol.: $295.4 million

McKay's Food & Drug
43251 Rescue Ln.
Hollywood, MD 20636
Phone: (301) 373-5848
Web: shopmckays.com
Pres./CEO: David McKay
Buyer: David McKay
Primary Supplier: UNFI
FW Stores: 3
FW Vol.: $46.7 million

MOM's Organic Market
5566 Randolph Rd
Rockville, MD 20852
Phone: (301) 816-4944
Web: momsorganicmarket.com
CEO: Scott Nash
Primary Supplier: Kehe
FW Stores: 16
FW Vol.: $221.6 million

Publix
3300 Publix Corporate Pkwy.
Lakeland, FL 33811
Phone: (863) 688-7407
Pres./CEO: Todd Jones
Charlotte, NC Div.:

See **DIRECTORY** on page 74


La Fe
TOSTONES
PAPAYA PULP
STRAWBERRY PULP
SOURSOP PULP
MADUROS
YUCA CASSAVA
WHOLE KERNEL CORN
GREEN PEAS
Steam Easy
CALIFORNIA BLEND
SHOESTRING POTATOES
PAPAS CORTE FINO
FROZEN FOODS LEADER on the EAST COAST
QUALITY SINCE 1922
Grace
GENUINE CARIBBEAN TASTE
Enjoyed Worldwide!
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ALITAS DE POLLO
HONEY JERK-MIEL
JERK
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TAKING STOCK

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Kullen's 37 Long Island stores, which included 32 King Kullen supermarkets and five Wild By Nature units, as well as its corporate offices located in Bethpage, NY.

The news came as a bit of a surprise as a memo from King Kullen emerged in April indicating that the deal would close by the end of the month.

The company's internal memo, which was issued on April 17 and referenced a prior memo from March 13, stated: "In our memorandum to you dated March 13, 2020 we advised you that the merger agreement between King Kullen and Stop and Shop had been extended to April 17, 2020 in order to resolve some outstanding issues which would allow us to complete the FTC approval process.

"Those issues have been largely resolved, and now final negotiations with the FTC toward completion of the approval process have begun. At the same time, however, the COVID-19 pandemic has had a substantial impact on supermarket operations in our region, raising issues that need to be considered carefully between Stop & Shop and King Kullen so that we can complete this merger successfully. Accordingly, the parties have agreed to amend, and have amended, the merger agreement to call for an outside completion date of April 30, 2020. This additional time will give representatives of both parties the opportunity to meet and begin to develop and implement a plan to coordinate the merger from an operations standpoint in consideration of these COVID-19 related issues.

"Stop & Shop continues to express enthusiasm about completing the merger. We are confident that with that commitment, and the diligence of both the Stop & Shop and King Kullen teams, we will meet this new challenge presented by the COVID-19 pandemic and complete this merger successfully."

Additionally, as recently as May 7 at the Ahold Delhaize annual general shareholders meeting, CEO Frans Muller said his company expected to finalize the deal in the second half of 2020.

In *Food Trade News'* 2020 market study, to be published June 29, Stop & Shop remains the share of market leader on Long Island with 52 stores, claiming 21.33 percent of all channel food and drug business in the $10.5 billion market. King Kullen, which has shuttered two stores since the deal with Stop & Shop was originally announced, continues to lose share in an area where competitive activity over the past three years has been volatile. The Bethpage, NY-family-owned regional chain ranks number five on Long Island with 6.48 percent of the all-channel food and drug business in the two-county market.

"I'm not surprised by this announcement," said a senior VP for a food broker based in the Metro New York area who calls on King Kullen. "This soap opera has gone on for far too long and it's adversely affected the culture and the momentum of the Kullen organization. It's going to be challenging to restart their engine. As for Stop & Shop, whether it was COVID-related, or became an FTC problem that they couldn't overcome, or the fact their parent firm Ahold Delhaize USA just agreed to acquire 62 Bi-Lo and Harveys Supermarkets and a distribution center from Southeastern Grocers, they seemed ready to move on."

And then there's one more thing: vendors again are unhappy with a new ADUSA edict that claims it will charge suppliers a reinstatement fee for returning out-of-stock items to the shelves. According to one of more than two dozen copies of the memo (sent by all ADUSA banners), "any LTMO (Long Term Manufacturer Outs) that is returned to distribution before October 1st is subject to an administrative fee aligned to brand specific costs (to incorporate administrative, tags, store labor/handling, etc.) ranging from $2.5-$5K." This decision follows an April 7 memo in which all ADUSA companies said they would seek "total trade rates" for 2020 that need to be delivered and that pandemic-related costs will be evaluated. "As we continue to evaluate the impacts of this pandemic on our business, we will review ancillary costs we are incurring and revisit with each supplier as needed at a later date."

This is just bad form. At the height of the pandemic, when all retailers were desperately searching for product (and many manufacturers bent over backwards to meet the demand), there wasn't much debate about individual SKU rationalization. Core items were most important, and many secondary items weren't available because suppliers prioritized getting their customers their best selling products.

Now, retroactively to penalize those vendors is not only unfair, it's greedy.

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TAKING STOCK

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Although the powers in Quincy or Zaandam might not believe this, but they're the only merchant in the U.S. deploying these ham-handed tactics.

Charging up to $5,000 to reinstate COVID-impacted out-of-stocks, asking for full trade rates after what's occurred (and is still occurring) and possibly seeking compensation for pandemic-related expenses that ADUSA has incurred?

You can see why the vendors are pissed.

As 100th Anniversary Nears, Utz Combines With PE Firm To Form New Publicly-Traded Entity

It's been no secret that Utz Quality Foods, the Hanover, PA-based manufacturer of salty snacks, which will celebrate its 100th anniversary next year, has been searching for the right partner to bolster its fast-growing business (it surpassed the $1 billion sales mark earlier this year). And earlier this month it stepped to the altar to combine with blank check private equity firm Collier Creek Holdings.

The family-owned snack firm's deal with the special purpose acquisition company (SPAC) will see the formation of a new company, Utz Brands, Inc. It is expected that the newly combined company, which will be a leading pure-play snack food platform in the U.S., will trade under the ticker symbol "Utz" on the New York Stock Exchange once the transaction is completed in the third quarter of 2020.

Dylan Lissette, who first joined Utz in 1995 and has served as the snack firm's CEO since 2013, will continue to serve in that role to lead the business along with the existing management team. Roger Deromedi, former chairman of Pinnacle Foods and ex-Kraft Foods CEO will become chairman of Utz Brands. Deromedi co-founded the Manhattan based investment firm along with Chinh Chu and Jason Giordano in 2018.

Utz Brands will remain headquartered in Hanover.

Proceeds from the transaction are expected to be used primarily to repay existing borrowings at Utz. The Rice and Lissette family, the founding family and owners of Utz, will retain more than 90 percent of its existing equity stake, which will represent more than 50 percent ownership in Utz Brands upon completion of the transaction.

The remaining ownership will be held by the public shareholders and sponsor of Collier Creek. In connection with the transaction, Collier Creek's sponsor and directors will invest approximately $35 million alongside public investors via a private placement pursuant to the forward purchase agreements entered into concurrent with Collier Creek's initial public offering. Collier Creek will become a Delaware corporation and the name of Collier Creek will be changed to Utz Brands, Inc.

Assuming no redemptions by the public shareholders of Collier Creek, the approximately $453 million in cash held in Collier Creek's trust account, together with the $35 million private placement, will be used to pay cash consideration to the current Utz owners, pay transaction expenses, and reduce the company's existing indebtedness to approximately 3.1x estimated 2020 Pro Forma Adjusted EBITDA.

The transaction will be structured as an entity called an "Up-C" where the continuing Utz owners will retain common units of a partnership managed by Utz Brands and an equal number of non-economic voting shares in Utz Brands. Utz Brands will also enter into a customary tax receivable arrangement with continuing Utz owners, which will provide for the sharing of tax benefits relating to certain pre-combination tax attributes, as well as tax attributes generated by the transaction and any subsequent sales or exchanges by the continuing Utz owners of their equity interests, as those attributes are realized by Utz Brands.

Utz has been expanding rapidly over the past decade, acquiring other snack food companies as well as manufacturing plants and distribution centers. In 2009, the company was close to merging with rival Snyder's of Hanover (now Snyder's-Lance, a division of Campbell's). In October 2016, it sold a minority stake to private equity firm Metropoulos & Co to help with the acquisition of Golden Flake Foods, a large snack food manufacturer based in Birmingham, AL. Fifteen months later, Utz reacquired those shares.

This deal looks like a very good fit for Utz, with Lissette continuing as pri-

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Interim Tag Is Removed As Kress Named President Of Giant Food

After 10 months as interim president of Giant Food, parent firm Ahold Delhaize USA (ADUSA) has removed the "temporary" tag and named the 36-year veteran of the Landover, MD-based chain president.

After taking the day-to-day helm of the ADUSA regional "brand" in July 2019, following the promotion of former Giant president Gordon Reid to run sister retailer Stop & Shop, Kress continued to advance his people-oriented skill set to another level as the leader of more than 20,000 associates at Giant's 164 stores in Maryland, Virginia, Delaware and Washington. DC.

Those skills were never better demonstrated than by two events which have recently occurred on Kress' watch. In early March, after prolonged and difficult labor negotiations, Giant and UFCW Locals 400 and 27 agreed to new four-year contracts covering the company's clerks and meatcutters. Adding a fourth year to the agreement was a key component (virtually all previous pacts had been three years in length), but more importantly the new labor deal finally created a plan that would help offset the more than $1.1 billion unfunded pension liability that faced Giant (and Safeway) and the two Maryland-based labor unions.

Less than a week later, the rapid spread of the coronavirus created new government-mandated policies which virtually locked down all non-essential activity in Giant's operating territory. As food stores remained open as essential businesses, consumers flocked to purchase and stock up on groceries creating intense pressure to protect the safety of store associates. Throughout the process, Giant's clerks and meatcutters, like most grocery merchants, persevered and shined during extremely challenging situations

"It's been an honor and privilege to lead Giant Food, especially during this time when our customers and communities have never needed us more. I'm honored to continue in the role and am incredibly appreciative of our associates who serve our customers with excellence every day. I look forward to continuing to grow the Giant Food brand in our communities," Kress said

In addition to his previous role as senior VP-operations, Kress has served many different roles for the Baltimore-Washington market's leading grocery chain. He began working in the stores in 1984 and has served in a variety of leadership roles in retail operations, human resources, training and labor relations.

Kress is also active in the community and serves as a board member on the Johns Hopkins Pediatric Oncology Advisory Council and the Ahold Delhaize USA Family Foundation.

"Ira has been a dedicated leader for Giant Food for 36 years and we are proud to appoint him to this role," said Kevin Holt, president, Ahold Delhaize USA. "Ira has been serving as interim president of Giant Food since last summer, and he has continued to lead the brand with success. He is an excellent leader, with a strong focus on serving customers, engaging associates and supporting local communities. During his role as interim president, Ira has continued to successfully grow sales, market share and build strong associate engagement during an unprecedented time for our industry."

IN REVIEW: TARGET

State	County	2020 Stores	2020 Sales (in millions)	2020 County Food Sales	% of 2020 County Market	2019 Stores	2019 Sales (in millions)	% of 2019 County Market
DC	Washington	5	$76.20	$2,196.50	3.47%	1	$16.40	0.80%
DC Recap: 5 stores with sales of $76.2 million. Total retail food sales for DC in the study: $2.2 billion. Target share of DC is 3.47 %.								
DE	Kent	1	$13.90	$466.70	2.98%	1	$13.70	2.96%
DE Recap: 1 store with sales of $13.9 million. Total retail food sales for DE in the study: $1.33 billion. Target share of DE is 1.04%.								
MD	Anne Arundel	5	$80.10	$2,039.70	3.93%	5	$78.30	3.78%
MD	Baltimore City	1	$17.70	$1,368.20	1.29%	1	$17.50	1.28%
MD	Baltimore County	6	$83.90	$2,929.60	2.86%	6	$82.10	2.89%
MD	Carroll	1	$11.70	$595.40	1.97%	1	$11.20	1.92%
MD	Charles	2	$23.40	$449.80	5.20%	2	$22.80	4.92%
MD	Frederick	1	$11.90	$827.60	1.44%	1	$11.70	1.48%
MD	Harford	3	$42.60	$929.60	4.58%	3	$42.10	4.80%
MD	Howard	2	$35.20	$1,090.20	3.23%	2	$34.60	3.33%
MD	Montgomery	6	$97.60	$3,412.40	2.86%	6	$94.90	2.94%
MD	Prince George's	9	$169.70	$2,836.10	5.98%	8	$149.20	5.22%
MD	St. Mary's	1	$13.60	$352.60	3.86%	1	$13.30	3.77%
MD	Talbot	1	$15.30	$196.20	7.80%	1	$14.90	7.76%
MD	Washington	1	$12.20	$461.20	2.65%	1	$11.90	2.64%
MD	Wicomico	1	$12.50	$263.40	4.75%	1	$12.30	4.75%
MD Recap: 40 stores with sales of $627.4 million. Total retail food sales for MD in the study: $18.96 billion. Target share of MD is 3.31%.								
PA	Cumberland	2	$28.20	$1,007.50	2.80%	2	$27.70	2.79%
PA	Dauphin	2	$24.50	$926.50	2.64%	2	$24.10	2.56%
PA	Franklin	1	$14.70	$413.50	3.56%	1	$14.40	3.63%
PA	Lancaster	3	$46.10	$1,556.20	2.96%	3	$45.20	3.07%
PA	York	3	$46.80	$1,420.80	3.29%	3	$46.30	3.38%
PA Recap: 11 stores with sales of $160.3 million. Total retail food sales for PA in the study: $4.99 billion. Target share of PA is 2.68%.								
VA	Albemarle	1	$12.50	$579.70	2.16%	1	$12.10	2.14%
VA	Arlington	1	$19.80	$845.70	2.34%	1	$19.10	2.41%
VA	Chesapeake City	3	$26.70	$820.40	3.25%	3	$25.90	3.49%
VA	Chesterfield	5	$56.90	$1,299.90	4.38%	5	$55.70	4.43%
VA	Culpeper	1	$13.10	$140.50	9.32%	1	$12.80	9.04%
VA	Fairfax	11	$193.20	$4,850.20	3.98%	11	$187.50	4.02%
VA	Frederick/VA	2	$24.00	$457.30	5.25%	2	$23.70	5.52%
VA	Hampton/Newport News	2	$24.20	$1,049.80	2.31%	2	$23.80	2.35%
VA	Hanover	1	$14.50	$424.30	3.42%	1	$14.10	3.45%
VA	Henrico	6	$78.90	$1,736.30	4.54%	6	$78.20	4.76%
VA	James City	2	$21.70	$381.20	5.69%	2	$20.90	5.66%
VA	Loudoun	3	$48.80	$1,379.20	3.54%	3	$48.10	3.68%
VA	Norfolk City	1	$12.10	$718.40	1.68%	1	$11.80	1.64%
VA	Prince William (Super Target)	4	$53.70	$1,688.30	3.18%	4	$53.10	3.15%
VA	Spotsylvania (SuperCenter)	2	$27.40	$693.80	3.95%	2	$26.90	3.94%
VA	Stafford	2	$30.60	$366.20	8.36%	2	$30.10	8.73%
VA	Virginia Beach	4	$48.40	$1,498.70	3.23%	4	$49.20	3.31%
VA	Warren	1	$14.70	$140.20	10.49%	1	$14.40	10.69%
VA Recap: 52 stores with sales of $721.2 million. Total retail food sales for VA in the study: $21.56 billion. Target share of VA is 3.34%.								

Mid-Atlantic Recap: 109 stores with sales of $1.6 billion annually. Mid-Atlantic retail food sales total: $50.04 billion
Target Per Store Average: $14.67 million

Source: *Food World,* June 2020

Eastern Shore Supermarket Leaders:

With 33 Delmarva Stores And 31.8% Share, Food Lion Continues Dominance In $1.2 Billion Market

- **Food Lion Remains Dominant**
- **Giant Posts Best Delmarva Comps**
- **Acme Retains #3 Ranking**
- **Redner's To Grow In Lewes, DE**
- **HT Solid, To Add Kent Isl. Unit**

Rank	Company	2020 Stores	2020 Sales (in millions)	% of 2020 Market	2019 Stores	2019 Sales (in millions)	% of 2019 Market
1	Food Lion	33	$378.70	31.76%	33	$372.50	32.11%
2	Giant Food	5	$178.14	14.94%	4	$165.74	14.29%
3	Acme Markets	7	$152.50	12.79%	7	$148.33	12.79%
4	Redner's Markets	6	$130.10	10.91%	6	$129.20	11.14%
5	Safeway	3	$76.07	6.38%	3	$77.90	6.71%
6	Harris Teeter	3	$58.30	4.89%	3	$57.70	4.97%
7	Weis Markets	5	$58.20	4.88%	5	$52.13	4.49%
8	C&S Independents	18	$50.10	4.20%	18	$45.90	3.96%
9	Save-A-Lot	7	$35.40	2.97%	7	$35.00	3.02%
10	Aldi	4	$32.10	2.69%	4	$33.30	2.87%
		91	**$1,149.61**	**96.41%**	**90**	**$1,117.70**	**96.35%**

The chart above lists the top 10 supermarket retailers in the Eastern Shore market. Counties/cities included are: Kent and Sussex in DE; Caroline, Dorchester, Kent, Queen Anne's, Somerset, Talbot, Wicomico and Worcester in MD; and Accomack and Northampton in VA. Petroleum sales are not included.

Total supermarket sales for the area are $1.19 billion.

Source: *Food World*, June 2020

Legislative Line

OMG – And It is Only June

We have reached the halfway point in 2020 and what a year it has been. The coronavirus has wreaked havoc with our daily lives, our work, our industry, etc. and now we have major civil unrest throughout the country resulting from the shooting of a black man in custody over the Memorial Day holiday in Minneapolis. The National Guard was called up in more than half of our U.S. states and counter demonstrations occurred across the pond in many other countries. It is all extremely frustrating and not to have leadership from the White House is even more upsetting. Let us hope leadership from other high levels of our federal and state governments combined with constructive guidance from local community and religious leaders brings us closer together as we must find ways to stop these serious ills that are disrupting our society. It is not that things will get better. It is that things MUST get better. Yes, I am upset, and you should be too.

Okay, I am getting off my soapbox now and back to the business of bringing you up to date on legislative and regulatory happenings in the Nation's Capital that impact the food industry.

SNAP Movement

The pandemic continues to be the focal point of a lot of hearings and legislative and regulatory activity occurring on the Hill. Certainly, the impact on the food industry has been widespread and much of it will be long lasting. One of the major changes for food retailers will be the ability to accept the Supplemental Nutrition Assistance Program (SNAP) benefits online. The Department of Agriculture has done a good job in the past few months to permit low income families and individuals in most states to use their food benefits online. But in a letter to USDA Secretary Sonny Perdue, House member Sanford Bishop (D-GA) said that USDA needs to approve more online retailers with a presence in rural states and communities with limited access to grocery stores. Presently only a handful of companies that meet certain e-commerce requirements can accept SNAP benefits online. In most states, Amazon and Walmart are the only options as I have previously reported.

"While the number of states participating is increasing, the vendors remain primarily in the northeastern area of the U.S.," wrote Bishop, chairman of the house appropriations agriculture-FDA subcommittee. Thus, while currently USDA has approved about 37 states to participate, accounting for 90 percent of SNAP households, Perdue commented that USDA has plans to expand the program to include more "independently owned and operated retail stores." And Congressman Bishop went further to say that dollar store chains could also offer online SNAP purchases to low-income families.

Using SNAP for Hot Meals

In mid-May, the House passed a $3 trillion "Heroes" pandemic relief bill. The legislation contained relief for state and local governments, hospitals, and a wide range of assistance programs, including SNAP. In addition to increased funding for SNAP, the bill also allows the temporary use of benefits to purchase hot meals in either restaurants or supermarkets. It is unlikely the new relief legislation will pass anytime soon in anything close to its present form, but it is possible that the hot meals provision will survive at least until the pandemic retreats.

Seafood Industry Boosted

The seafood industry has been severely damaged by the nation's response to the pandemic. As restaurants and hotels in every state closed to prevent the spread of COVID-19, the market for fresh seafood dried

Barry F. Scher
Policy Solutions LLC

up. To help address this, the president signed an executive order instructing federal agencies to work to expand sustainable seafood production. The order focuses on deregulating the permitting process for aquaculture, speeding up other regulatory reforms and making $300 million available to fishermen and seafood businesses hurt by COVID-19.

Meat Industry Problems Continue, But A Ray of Hope Exists

The meat industry continues to struggle with the impact of COVID-19 on its facilities and its employees. Employee infection rates have grown and remain high, facilities continue to close and re-open, the industry is changing how it operates and is spending millions revamping its plants and still production continues to lag. Major newspapers including the *Washington Post* and the *New York Times* have written major stories recently on this matter.

Nevertheless, according to *Politico*, meat supplies are rebounding, and spot shortages of meat products should let up in the coming weeks as wholesale prices fall slowly and supplies tick up just as it would normally be at peak grilling season. After a slew of plant closures, beef and pork processing plants are now, at press time, operating at over 80 percent capacity, *Bloomberg News* reported.

Yet, according to an item I noted in the publication *Business Insider*, business is booming for butchers and local meat processing operations that have not faced the same coronavirus shutdowns as massive slaughterhouses across the country. The sudden demand for local meat processors comes after a long period of decline, with many smaller businesses squeezed out by larger chains.

Food Box Contracts – Questionable

To get food to those in need, USDA swiftly created plans to distribute boxes of surplus food to needy individuals and families. Great idea! However, government watchdogs have cried foul, stating that multimillion-dollar contracts to distribute the food boxes have gone to companies that appear to have little to no experience working with food banks or even farmers. And *Politico* even mentioned that food industry experts have been quietly grousing about whether many of the quickly hired firms can pull off the task of buying up a variety of perishable food items, packing them in boxes, and then distributing them to food banks. The cost of the box food distribution program is more than $1.2 billion!

The House agriculture subcommittee on nutrition, oversight and department operations issued a statement saying they "are concerned that contracts were awarded to entities with little to no experience in agriculture or food distribution and with little capacity to meet the obligations of their award" and wants answers quickly. Is this another very wasteful exercise in government good intentions gone bad? We shall see. Some of the contracts to prepare and distribute the food boxes went to such firms as an event planning firm that specializes in weddings; a firm that sells lotions and other wellness products at airports; and a California firm that offers "business finance solutions." Go figure.

Organic Or Not?

If it is grown in water can it be called "organic"? You may recall that I have previously commented about this issue as last March the Center for Food Safety filed a lawsuit challenging the National Organic Standards Board's decision to allow hydroponically grown produce to be certified organic. The produce industry publication *The Packer* reports that the Department of Justice has intervened asking the court to dismiss the suit. The Justice Department's action was praised by the Coalition for Sustainable Organics. Whether it is grown hydroponically or in good old dirt, if it is not sprayed with chemicals, I would say it is truly organic!

Dietary Guidelines

I have tried to keep readers up to date on the roll-out of the Dietary Guidelines. Keep in mind that the all-important Dietary Guideline's main purpose is to form the development of Federal food, nutrition, and health policies and programs. Compare it to that of constructing a building. The Dietary Guidelines are the foundation. The guidelines are a critical tool for professionals to help Americans make healthy choices in their daily lives to prevent chronic disease and enjoy a healthy diet. The next critical step comes this month when the Dietary Guidelines Committee draft conclusions will be announced. Then after taking comments and suggestions, the advisory committee will publish a final scientific report that will advise USDA and HHS as they craft the 2020 Dietary Guidelines.

The guidelines, once completed and approved, will then become a document with a five-year lifespan for use by both

See **LEGISLATIVE LINE** on page 115

Eastern Shore Market Leaders:

Eastern Shore Leadership Defined By Walmart, Food Lion, Which Control 31.6% Of 12-County Mkt.

- Alts. Command 50.6% Of Mkt.
- No New Stores, But WM Still #1
- Drug Chains Control 14.3%
- Wawa Paces All C-Stores
- Mass Class Of Trade: 18.2%

Rank	Company	2020 Stores	2020 Sales (in millions)	% of 2020 Market	2019 Stores	2019 Sales (in millions)	% of 2019 Market
1	Walmart (SuperCenter)	14	$417.40	16.55%	14	$406.70	16.70%
2	Food Lion	33	$378.70	15.02%	33	$372.50	15.30%
3	Walgreens	35	$179.40	7.12%	33	$164.70	6.76%
4	Giant Food	5	$178.14	7.07%	4	$165.74	6.81%
5	Acme Markets	7	$152.50	6.05%	7	$148.33	6.09%
6	Wawa	22	$135.50	5.37%	21	$133.06	5.47%
7	Redner's Markets	6	$130.10	5.16%	6	$129.20	5.31%
8	Royal Farm Stores	55	$121.40	4.81%	52	$107.20	4.40%
9	Rite Aid	29	$94.90	3.76%	32	$102.60	4.21%
10	CVS+	18	$85.90	3.41%	18	$83.20	3.42%
11	Safeway	3	$76.07	3.02%	3	$77.90	3.20%
12	Sam's Club	2	$73.50	2.92%	2	$71.60	2.94%
13	BJ's Wholesale Club	2	$67.20	2.67%	2	$64.70	2.66%
14	Fas-Marts	39	$59.70	2.37%	40	$57.30	2.35%
15	Harris Teeter	3	$58.30	2.31%	3	$57.70	2.37%
16	Weis Markets	5	$58.20	2.31%	5	$52.13	2.14%
17	C&S Independents	18	$50.10	1.99%	18	$45.90	1.89%
18	Target	3	$41.70	1.65%	3	$40.90	1.68%
19	Save-A-Lot	7	$35.40	1.40%	7	$35.00	1.44%
20	Aldi	4	$32.10	1.27%	4	$33.30	1.37%
		310	**$2,426.21**	**96.23%**	**307**	**$2,349.66**	**96.21%**

The chart above lists the top 20 retailers in the Eastern Shore market which sell groceries, HBC, drugs, general merchandise and tobacco products. Volumes listed include 100% of store sales for supermarkets, c-stores and drug chains. Sales for club stores, Kmart, Target and Walmart are extrapolated to include comparable categories, as explained in the formula on page 85. Petroleum sales are not included. Counties/cities included are: Kent and Sussex in DE; Caroline, Dorchester, Kent, Queen Anne's, Somerset, Talbot, Wicomico and Worcester in MD; and Accomack and Northampton in VA. ( ) Indicates another banner used by the company.

Total food sales for the area are: $2.52 billion.

Source: *Food World*, June 2020

IN REVIEW: WEGMANS

State	County	2020 Stores	2020 Sales (in millions)	2020 County Food Sales	% of 2020 County Market	2019 Stores	2019 Sales (in millions)	% of 2019 County Market
MD	Anne Arundel	1	$81.50	$2,039.70	4.00%	1	$77.20	3.72%
MD	Baltimore County	2	$152.70	$2,929.60	5.21%	2	$148.70	5.23%
MD	Frederick	1	$66.00	$827.60	7.97%	1	$64.20	8.12%
MD	Harford	1	$83.90	$929.60	9.03%	1	$81.60	9.31%
MD	Howard	1	$95.10	$1,090.20	8.72%	1	$92.50	8.89%
MD	Montgomery	1	$90.20	$3,412.40	2.64%	1	$87.10	2.70%
MD	Prince George's	1	$87.30	$2,836.10	3.08%	1	$84.30	2.95%
MD Recap: 8 stores with sales of $656.7 million. Total retail food sales for MD in the study: $18.96 billion. Wegmans share of MD is 3.46%.								
PA	Cumberland	1	$55.70	$1,007.50	5.53%	1	$54.20	5.45%
PA	Lancaster	1	$59.30	$1,556.20	3.81%	1	$57.40	3.90%
PA Recap: 2 stores with sales of $115.0 million. Total retail food sales for PA in the study: $4.99 billion. Wegmans share of PA is 1.92%.								
VA	Albemarle	1	$64.20	$579.70	11.07%	1	$62.40	11.02%
VA	Chesterfield	1	$58.30	$1,299.90	4.48%	1	$55.50	4.42%
VA	Fairfax	3	$309.70	$4,850.20	6.39%	3	$296.70	6.35%
VA	Henrico	1	$61.40	$1,736.30	3.54%	1	$59.80	3.64%
VA	Loudoun	2	$168.40	$1,379.20	12.21%	2	$166.20	12.72%
VA	Prince William	2	$190.70	$1,688.30	11.30%	2	$185.20	10.97%
VA	Spotsylvania	1	$65.80	$693.80	9.48%	1	$64.20	9.41%
VA	Virginia Beach	1	$63.50	$1,498.70	4.24%	0	$0.00	0.00%
VA Recap: 12 stores with sales of $982.0 million. Total retail food sales for VA in the study: $21.56 billion. Wegmans share of VA is 4.55%.								

Mid-Atlantic Recap: 22 stores with sales of $1.75 billion annually. Mid-Atlantic retail food sales total: $50.04 billion.
Wegmans Per Store Average: $79.71 million

Source: *Food World,* June 2020

TAKING STOCK

from page 65

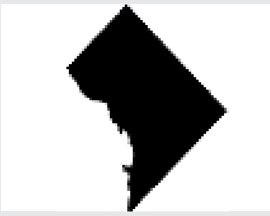
mary day-to-day leader and Deromedi, whose vast food industry experience, serving as a guiding hand as the company seeks further growth.

'Round The Trade

The Food Industry Association/FMI earlier this month released its annual U.S. Grocery Shopper Trends report, which extensively tracks consumer grocery shopping habits. Prepared by research firm The Hartman Group, the 2020 report provides a distinct picture of grocery shopping habits before the pandemic, attitude shifts that took place during COVID-19 and offers a glimpse of what might come next for the food industry. According to the report, prior to the pandemic, U.S. grocery shopper trends followed a familiar pattern. Weekly household trips to the grocery store remained high, at 2.7 trips per week, and shoppers continued to utilize several different channels and banners to meet their monthly grocery needs. In the early weeks of COVID-19, weekly trips to the grocery store by households increased to 3.6, while 40 percent of shoppers reported they were shopping fewer stores for their household grocery needs. In early 2020, 14.5 percent of grocery spending was online, a significant increase over the previous year. However, COVID-19 greatly accelerated the move to online grocery shopping with online spending doubling to 27.9 percent of all grocery spending during March and April. Many shoppers were new to online grocery shopping and were willing to break previous barriers, including 12 percent reporting purchasing fresh produce online for the first time. Nearly all families (87 percent) reported that eating together was important and the COVID-19 pandemic had only amplified this value. Some younger shoppers, particularly 48 percent of Gen Z and millennials, said they were eating healthier during the pandemic. Forty-one percent of shoppers surveyed noted they were cooking more, and 42 percent were minimizing trips to the store or using perishables before they spoil. Before the pandemic nearly all (90 percent) grocery shoppers reported dining out sometimes, but during March and April only 45 percent of shoppers reported utilizing restaurant delivery while 35 percent reported cooking at home six to seven days a week. "In looking toward the future, most consumers expect to return to their pre-pandemic levels of in-store grocery shopping and more than a fourth of consumers expect to be ordering more groceries online in the future," said Leslie Sarasin, president and CEO of FMI. "The food industry will continue to listen to consumers and let them guide us on how to best meet their changing household needs. Whatever comes next, we know the supply chain is tremendously resilient and that we can flex, pivot and accommodate the demands of the nation's grocery shoppers."...in other COVID-19-related new data, research organization Brick Meet Click (BMC) noted that online grocery sales for the month of May topped the previous high water mark set a month earlier. BMC said sales jumped 24 percent over April's revenue to reach $6.6 billion and that online orders also increased 18 percent to 73.5 million from the previous month. Additionally, the average "ring" in May was $90, a six percent gain from April's former record setting level. And trust me, it's not just Amazon/Whole Foods and Walmart dominating the online space; retailers whose average online revenue was at or below one percent of total sales have told me that digital-driven volume is now in the four to five percent range...Kroger and Ocado are enhancing their relationship and will build three more fulfillment centers in the Great Lakes, west and northwest regions. With Ocado-inspired fulfillment centers either operational or under construction in Frederick, MD; Groveland, FL; Atlanta; Dallas; Monroe, OH; and Pleasant Prairie, WI, Kroger is further advanced than any other supermarket retailer in offering an infrastructure – BOPIS, delivery through Instacart and Ocado - that will further enhance its e-commerce initiatives. And just before presstime, Kroger posted its very strong Q1 sales and earnings. For the period ended May 23, Kroger's comp store revenue jumped 19 percent (excluding gas) and its profit grew 47.2 percent to $1.3 billion, both historic figures. Additionally, the Cincinnati-based merchant saw its digital sales zoom 92 percent. Those are certainly dynamic numbers, but as more retailers release their full financials for the March-April-May period, you're likely to see similar elevated sales and earnings. Another likelihood in future announcements will be the reluctance of retailers to provide financial guidance for the remainder of their fiscal years. At Kroger, CFO Gary Millerchip said: "The COVID-19 pandemic has dramatically changed the outlook for food

TAKING STOCK continues on page 91

WASHINGTON, DC SHARE OF MARKET: 2020



District of Columbia ($2.2 billion)

- Population 702,455
- # of households 281,322
- Median income $82,604
- Under age 18...................... 17.8%
- Over age 65........................ 11.9%

- Female 52.5%
- White 36.2%
- Black................................. 46.9%
- Hispanic 10.9%
- Asian.................................. 3.9%

Rank	Company	Stores	(in millions)	Market
1.	CVS+	63	$477.30	21.73%
2.	Safeway	11	$294.66	13.41%
3.	Giant Food	7	$278.18	12.66%
4.	Whole Foods	5	$193.60	8.81%
5.	Harris Teeter	4	$168.70	7.68%
6.	International Markets	11	$119.30	5.43%
7.	Trader Joe's	5	$117.60	5.35%
8.	Walmart (SuperCenter)	3	$93.70	4.27%
9.	7-Eleven	50	$86.20	3.92%
10.	Target	5	$76.20	3.47%
11.	Walgreens	10	$58.20	2.65%
12.	Costco	1	$55.10	2.51%
13.	Streets Market	6	$43.20	1.97%
14.	Military Commissaries	1	$17.13	0.78%
15.	Wawa	5	$14.80	0.67%
16.	MOM's Organic Market	1	$12.90	0.59%
17.	Aldi	1	$11.40	0.52%
18.	Save-A-Lot	1	$6.10	0.28%
19.	C&S Independents	1	$0.77	0.04%
		191	**$2,125.04**	**96.75%**

( ) Name in parentheses indicates another banner used by the company.
+Stand-alone CVS and in-Target pharmacies

Source: *Food World*, June 2020

IN REVIEW: FOOD LION

State	County	2020 Stores	2020 Sales (in millions)	2020 County Food Sales	% of 2020 County Market	2019 Stores	2019 Sales (in millions)	% of 2019 County Market
DE	Kent	4	$27.90	$466.70	5.98%	4	$27.50	5.94%
DE	Sussex	9	$124.70	$864.80	14.42%	9	$122.10	14.85%
DE Recap: 13 stores with sales of $152.6 million. Total retail food sales for DE in the study: $1.33 billion. Food Lion share of DE is 11.46%.								
MD	Anne Arundel	5	$60.30	$2,039.70	2.96%	6	$68.50	3.30%
MD	Baltimore County	6	$53.80	$2,929.60	1.84%	6	$53.10	1.87%
MD	Caroline	2	$17.80	$76.20	23.36%	2	$17.60	24.89%
MD	Carroll	3	$37.40	$595.40	6.28%	3	$36.50	6.26%
MD	Cecil	3	$29.10	$251.60	11.57%	3	$28.70	11.83%
MD	Charles	3	$34.90	$449.80	7.76%	3	$34.60	7.47%
MD	Dorchester	1	$10.90	$59.30	18.38%	1	$10.70	18.42%
MD	Frederick	5	$62.40	$827.60	7.54%	5	$61.60	7.79%
MD	Harford	2	$9.90	$929.60	1.06%	2	$9.70	1.11%
MD	Howard	2	$19.70	$1,090.20	1.81%	2	$19.50	1.87%
MD	Kent	1	$14.00	$95.80	14.61%	1	$13.80	15.52%
MD	Montgomery	1	$10.10	$3,412.40	0.30%	1	$10.00	0.31%
MD	Prince George's	3	$36.80	$2,836.10	1.30%	3	$36.20	1.27%
MD	Queen Anne's	2	$20.90	$130.60	16.00%	2	$20.70	15.87%
MD	Somerset	2	$23.30	$38.90	59.90%	2	$23.00	75.91%
MD	St. Mary's	2	$25.90	$352.60	7.35%	2	$25.60	7.25%
MD	Washington	1	$10.40	$461.20	2.25%	1	$10.20	2.26%
MD	Wicomico	4	$34.70	$263.40	13.17%	4	$33.80	13.05%
MD	Worcester	4	$56.80	$209.70	27.09%	4	$56.30	27.49%
MD Recap: 52 stores with sales of $569.1 million. Total retail food sales for MD in the study: $18.96 billion. Food Lion share of MD is 3.0%.								
PA	Franklin	1	$10.00	$413.50	2.42%	1	$9.90	2.50%
PA	York	1	$4.50	$1,420.80	0.32%	1	$4.50	0.33%
PA Recap: 2 stores with sales of $12.5 million. Total retail food sales for PA in the study: $4.99 billion. Food Lion share of PA is 0.24%.								
VA	Accomack	2	$28.30	$85.90	32.95%	2	$27.90	33.29%
VA	Albemarle	6	$57.60	$579.70	9.94%	6	$56.40	9.96%
VA	Caroline	2	$15.60	$29.90	52.17%	2	$15.40	56.41%
VA	Chesapeake City	12	$128.10	$820.40	15.61%	12	$125.70	16.95%
VA	Chesterfield	17	$190.70	$1,299.90	14.67%	17	$186.20	14.82%
VA	Dinwiddie	4	$34.50	$123.20	28.00%	4	$33.90	27.76%
VA	Essex	1	$10.00	$57.50	17.39%	1	$9.90	18.23%
VA	Fairfax	2	$28.90	$4,850.20	0.60%	2	$28.10	0.60%
VA	Fauquier	3	$20.90	$166.30	12.57%	3	$20.60	13.23%
VA	Gloucester	2	$20.10	$112.90	17.80%	2	$19.80	17.85%
VA	Goochland	2	$19.30	$26.60	72.56%	2	$18.80	72.31%
VA	Greene	1	$8.60	$20.40	42.16%	1	$8.40	42.21%
VA	Hampton/Newport News	16	$244.70	$1,049.80	23.31%	16	$239.50	23.68%
VA	Hanover	6	$64.20	$424.30	15.13%	6	$64.10	15.68%
VA	Henrico	14	$170.10	$1,736.30	9.80%	14	$168.60	10.26%
VA	Isle of Wight	3	$31.40	$82.30	38.15%	3	$31.00	36.60%
VA	James City	5	$52.90	$381.20	13.88%	5	$52.50	14.22%
VA	King George	2	$23.70	$84.20	28.15%	2	$23.40	28.16%
VA	King William	2	$26.70	$37.30	71.58%	2	$26.30	71.86%
VA	Lancaster	1	$12.80	$79.80	16.04%	1	$12.60	16.32%
VA	Loudoun	3	$33.50	$1,379.20	2.43%	3	$33.20	2.54%
VA	Louisa	2	$19.90	$44.20	45.02%	2	$19.70	43.20%
VA	Madison	1	$12.10	$13.30	90.98%	1	$11.90	90.84%
VA	Mathews	1	$12.40	$14.20	87.32%	1	$12.20	80.26%
VA	Middlesex	1	$12.80	$29.10	43.99%	1	$12.50	43.71%
VA	New Kent	3	$31.40	$47.30	66.38%	3	$30.80	69.21%

IN REVIEW: FOOD LION

State	County	2020 Stores	2020 Sales (in millions)	2020 County Food Sales	% of 2020 County Market	2019 Stores	2019 Sales (in millions)	% of 2019 County Market
VA	Norfolk City	8	$116.80	$718.40	16.26%	8	$113.10	15.73%
VA	Northampton	2	$19.40	$33.80	57.40%	2	$19.10	60.83%
VA	Northumberland	1	$12.50	$18.80	66.49%	1	$12.30	69.89%
VA	Orange	3	$25.90	$109.20	23.72%	3	$25.60	24.24%
VA	Page	2	$10.20	$64.80	15.74%	2	$10.10	16.21%
VA	Portsmouth City	5	$64.40	$279.10	23.07%	5	$63.10	23.27%
VA	Powhatan	2	$20.80	$67.90	30.63%	2	$20.40	31.24%
VA	Prince George	2	$19.40	$76.90	25.23%	2	$19.00	25.07%
VA	Prince William	9	$114.70	$1,688.30	6.79%	10	$116.60	6.91%
VA	Richmond	1	$12.10	$20.30	59.61%	1	$11.90	59.20%
VA	Shenandoah	3	$37.00	$108.80	34.01%	3	$36.60	35.64%
VA	Southampton	2	$25.90	$83.60	30.98%	2	$25.60	31.45%
VA	Spotsylvania	1	$10.70	$693.80	1.54%	1	$10.50	1.54%
VA	Suffolk City	5	$44.40	$277.80	15.98%	5	$43.60	16.69%
VA	Virginia Beach	21	$220.60	$1,498.70	14.72%	22	$233.49	15.73%
VA	Westmoreland	2	$23.50	$45.10	52.11%	2	$23.30	55.21%
VA	York	4	$42.60	$163.70	26.02%	4	$41.87	25.88%

VA Recap: 187 stores with sales of $2.13 billion. Total retail food sales for VA in the study: $21.56 billion. Food Lion share of VA is 9.98%.

Mid-Atlantic Recap: 254 stores with sales of $2.87 billion annually. Mid-Atlantic retail food sales total: $50.04 billion.
Food Lion Per Store Average: $11.29 million

Source: *Food World,* June 2020

From page 62

4135 S. Stream Blvd., Ste. 500
Charlotte, NC 28217
Phone: (704) 424-5017
Div. VP: Chuck Roskovich
Web: publix.com
Primary Supplier: Direct
FW Stores: 15
Area Vol: $200.3 million

Redner's Markets Inc.
3 Quarry Rd.
Reading, PA 19605
Phone: (610) 926-3700
Web: rednersmarkets.com
Chairman: Richard Redner
Pres/CEO: Ryan Redner
COO: Gary M. Redner
VP Procurement: Dan Eberhart
VP/General Counsel: Jason Hopp
VP-Finance: Michael McNaney
VP-Groc. Ops.: William Wallace
VP-Perishables: Gary O'Brien
VP-HR: Robert McDonough
VP-IT: Nicholas Hidalgo
Primary Supplier: UNFI
FW Stores: 13
FW Vol.: $248.3 million

Roots Market
5805 Clarksville Square Dr.
Clarksville, MD 21029
Phone: (443) 535-9321
web: rootsmkt.com
Owner: Jeff Kaufman
Primary Supplier: UNFI
FW Stores: 2
FW Vol.: $20.9 million

Safeway Eastern
Div. of Albertsons Cos.
4551 Forbes Blvd.
Lanham, MD 20706
Phone: (301) 918-6500
Web: safeway.com
Pres.: Tom Lofland
VP-Retail Op.: Joe Perry
VP-Merch./Mktg.: Matthew Boyd
Dir.-Finance: Randy Weist
Dir.-HR: Stephanie Ridore
Dir.-Pharmacy: Greg Herr
Dir.-Mktg.: Kelly Boyd
Dir.-Distribution: Brian Schwartz
Dir.-Asset Mgmt.: Bob Rosato
GM-Dist./Procurement/QC: Tracey Bloedel
DMs: Ed Tippett, Bryan Caudle, Monica Shannon, Phil White, Lori Valenzuela, Theresa Farello
Sales Mgr.-Grocery: Pat Hildebrand
Sales Mgr.-Deli: Angie Marshall
Sales Mgr.-Bakery: Christine Hernandez
Sales Mgr.-Meat/Seafood: Mike Salisbury
Sales Mgr.-Produce: Ricardo Dimarzio
Sales Mgr.-Floral: Katie Vazquez
Sales Mgr.-GM/HBC: Mike Voss
Sales Mgr.-Liquor: Tim Ley
Sales Mgr.-Own Brands: Danielle Mulcare
Primary Supplier: Direct
FW Stores: 110
FW Vol.: $2.34 billion

Save-A-Lot
400 Northwest Plaza
St. Ann, MO 63074
Phone: (314) 592-9100
Web: savealot.com
CEO: Kenneth McGrath
Supplier: Direct
FW Stores: 49
FW Vol.: $281.1 million

Shoppers Food & Pharmacy
Div. of UNFI
4931 Tesla Dr., Ste. B
Bowie, MD 20715
Phone: (301) 306-8600
Web: shoppersfood.com
CEO: Steve Spinner
Primary Supplier: UNFI
FW Stores: 24
FW Vol.: $643.7 million

ShopRite
5000 Riverside Dr.
Keasby, NJ 08832
Phone: (908) 527-3300
Web: shoprite.com
Chmn/CEO: Joseph Colalillo
Pres./COO: Joseph Sheridan
FW Stores: 19 (includes Price Rite)
FW Vol.: $1444.4 million
*This is the retail arm of wholesaler grocery co-op Wakefern Food Corp. Most of the ShopRite stores are independently owned.

Sprouts Farmers Market
5455 E. High St., Ste. 111
Phoenix, AZ 85054
Phone: (480) 814-8016
Web: sprouts.com
CEO: Jack Sinclair
Chief Operations Officer: Dan Sanders
SVP/CMO: Gillian Phipps
SVP-East: Dan Croce
Primary Supplier: Direct
FW Stores: 4
FW Vol.: $68.8 million

Streets Market & Café
2400 14th St. NW
Washington, DC 20009

See **DIRECTORY** on page 75

From page 74

Phone: (202) 265-3300
Web: streetsmarket.com
VP: Campbell Burns
Primary Supplier: UNFI
FW Stores: 9
FW Vol.: $61.9 million

Trader Joe's
East Coast Div.
711 Atlantic Ave.
Boston, MA 02111
Phone: (857) 400-3400
Web: traderjoes.com
CEO: Dan Bane
Supplier: Direct
FW Stores: 27
FW Vol.: $590.6 million

Tri-State Co-Op
506 E. Gibbsboro Rd.
Lindenwold, NJ 08021
Phone: (856) 783-2534
web: tristatecoop.com
Pres.: Paul Buckley
FW Stores: 1
FW Vol.: $13.8 million
*This is the marketing office for several smaller independent retailers operating in Maryland, Pennsylvania and New Jersey. They are supplied by UNFI.

Wegmans Food Markets, Inc.
1500 Brooks Ave.
P.O. Box 30844
Rochester, NY 14603-0844
Phone: (585) 328-2550
Web: wegmans.com
Chmn.: Danny Wegman
CEO/Pres.: Colleen Wegman
Primary Supplier: Direct
FW Stores: 22
FW Vol.: $1.75 billion

Weis Markets, Inc.
1000 S. 2nd St.
Sunbury, PA 17801
Phone: (570) 286-4571
Web: weismarkets.com
Chairman/CEO: Jonathan Weis
COO: Kurt Schertle
SVP/CFO/Treasurer: Scott Frost
SVP-Real Estate/Store Dev.: Rusty Graber
SVP-HR: Jim Marcil
SVP-Operations: David Gose
SVP-Merch./Marketing: Richard Gunn
SVP-Supply Chain/Logistics: Wayne Bailey
VP/CIO: Greg Zeh
VP/Corp. Controller: Jeanette Rogers
VP-Advertising/Marketing: Ron Bonnaci
VP-Fresh Merch.: Bob Gleeson
VP-Asset Protection: Will England
VP-Pharmacy: Rick Seipp
VP-Distribution: Joe Kleman
VP-Operational Admin.: John Neuberger
VP-Const./Store Dev.: Kevin Small
VP-Real Estate/Legal Affairs: Jack O'Hara
VP-Talent Dev./Associate Rel.: Bob Cline
Regional VPs: Brent Mertes, James Daly, Wendy Oliver
Sr. Dir.-Center Store Merch./Sales: Brian Bosworth
Dir.-Bakery: Carl Hughes
Dir.-GM/HBC/GNFDS: Steve Davis
Dir.-Marketing/Adv.: Maria Rizzo
Dir.-Center Store Merch.: Ashley Odom
Dir.-Deli/Foodservice: Elaine Cole
Dir.-Center Store Sales-Dairy/Frozen/Comms.: Michelle Dorin
Dir.-Meat Merch.: Doug Becker
Dir.-Floral: Lucy Jason
Dir.-Seafood: Dale Lubold
Dir.-Business Systems: Tom Mowrey Jr.
Dir.-Merch. Technologies: Mike Zettlemoyer
Dir.-Purchasing: Eric Erikson
Primary Supplier: Direct
FW Stores: 99
FW Vol.: $1.58 billion

Whole Foods Market
Div. of Amazon
Mid-Atlantic Div.
5515 Security Ln., Ste. 900
Rockville, MD 20852
Reg. Pres: Scott Allshouse
Northeast Div. Area
5815 Hudson St., 32nd Fl.
Jersey City, NJ 07302
Phone: (201) 567-2090
Fax.: (201) 567-2067
Reg. Pres.: Nicole Wescoe
CEO: John Mackey
Web: wholefoodsmarket.com
FW Stores: 31
Area $1.11 billion

DRUG STORES

CVS Caremark
One CVS Dr.
Woonsocket, RI 02895
Phone: (401) 765-1500
Web: cvs.com
CEO/Pres.: Larry Merlo
FW Stores: 639
FW Vol.: $3.36 billion
*Includes both standalone stores and pharmacies within Target locations.

Rite Aid
30 Hunter Ln.
Camp Hill, PA 17011
P.O. Box 3165
Harrisburg, PA 17105
Phone: (717) 761-2633
Web: riteaid.com

See **DIRECTORY** on page 76

From page 75

Chmn./CEO: Heyward Donigan
COO: Jim Peters
FW Stores: 202
FW Vol.: $665.6 million

Walgreens
200 Wilmot Rd.
Deerfield, IL 60015
Phone: (847) 940-2500
Web: walgreens.com
CEO: Stefano Pessina
FW Stores: 328
FW Vol.: $1.68 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: 1,118
FW Vol.: $2.02 billion

Circle K Convenience Stores, Inc.
Div. of Couche-Tard
935 E. Tallamadge Ave.
Akron, OH 44310
Phone: (330) 630-6300
1100 Situs Ct., Ste. 100
Raleigh, NC 27606
Phone: (919) 774-6700
Web: circlek.com
Pres./CEO Brian P. Hannasch
FW Stores: 33
FW Vol.: $61.6 million

Dash In
Div. of The Wills Group
6355 Crain Hwy.
La Plata, MD 20646
Phone: (301) 934-2200
Chmn./CEO/Pres.: Julian B. Wills III
Web: dashin.com
Primary Supplier: McLane
FW Stores: 43
FW Vol.: $78.4 million

Fas Mart/Shore Shop Stores
Div. of GPM Investments
8565 Magellan Pkwy., Ste. 400
Richmond, VA 23227
Phone: (804) 730-1568
Web: fasmart.com
CEO: Arie Kotler
Primary Supplier: McLane
FW Stores: 98
FW Vol.: $153.5 million

High's of Baltimore, LLC
Div. of Carroll Independent Fuel Co.
2700 Loch Raven Rd.
Baltimore, MD 21218
Phone: (410) 859-3636
Web: highs.com
Pres.: John Phelps
Primary Supplier: Liberty
FW Stores: 49
FW Vol.: $75.3 million

Miller Marts
1000 E. City Hall Ave.
Norfolk, VA 23504
Phone: (757) 623-6600
Web: milleroil.com
Pres.: Jeff Miller
Primary Supplier: Davenport
FW Stores: 17
FW Vol.: $27.4 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: 198
FW Vol.: $427.6 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: 68
FW Vol.: $122.9 million

Sheetz, Inc.
243 Sheetz Way
Claysburg, PA 16625
Phone: (800) 765-4686
Web: sheetz.com
CEO/Pres.: Joe Sheetz
Primary Supplier: Direct
FW Stores: 140
FW Vol.: $507.1 million

Turkey Hill Minit Markets
Div. of EG Group
257 Centerville Rd.
Lancaster, PA 17603
Phone: (717) 299-8908
Web: www.turkeyhillstores.com
Primary Supplier: Core-Mark
FW Stores: 116
FW Vol.: $164.3 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: 164
FW Vol.: $1.06 billion

XtraMart Convenience Stores
Div. of Global Partners
800 South St., Ste. 500
Waltham, MA 02453
Phone: (800) 243-6366
Web: xtramart.com
CEO: Eric Slifka
FW Stores: 2
FW Vol.: $4.3 million

WHOLESALE CLUBS

BJ's Wholesale Club
25 Research Dr.
Westborough, MA 01581
Phone: (774) 512-7400
Web: bjs.com
Exec. Chmn.: Christopher Baldwin
CEO: Lee Delaney
FW Stores: 29
FW Vol.: $935 million (grocery/HBC only)

Costco
Northeast Div.
45940 Horseshoe Dr., Ste. 150
Sterling, VA 20166
Phone: (703) 406-6800
Web: costco.com
Pres. Craig Jelinek
Northeast Div. SVP/GM: Jeffrey Long
FW Stores: 30
FW Vol.: $1.59 billion (grocery/HBC only)

Sam's Club
2101 SE Simple Savings Dr.
Bentonville, AR 72716
Phone: (501) 273-4000
Web: samsclub.com
CEO/Pres.: Kathryn McLay
FW Stores: 26
FW Vol.: $919.4 million (grocery/HBC only)

MASS MERCHANDISERS

Kmart
Div. of Transform Holdco.
3333 Beverly Rd.
Hoffman Estates, IL 60179
Phone: (847) 286-2500
CEO: Edward Lampert
FW Stores: 11
FW Vol.: $65.6 million (grocery/HBC only)

Target
1000 Nicollet Mall
Minneapolis, MN 55402
Phone: (612) 304-6073
Web: target.com
CEO: Brian Cornell
FW Stores: 109 (includes Super Target)
FW Vol.: $1.6 billion (grocery/HBC only)

Walmart
702 Southwest 8th St.
Bentonville, AR 72716
Phone: (479) 273-4000
Web: walmart.com
Pres./CEO: Doug McMillon
Pres/CEO - U.S.: John Furner
FW Stores: 161 (includes SuperCenter/Neighborhood Mkt.)
FW Vol.: $5.02 billion (grocery/HBC only)

IN REVIEW: WHOLE FOODS

State	County	2020 Stores	2020 Sales (in millions)	2020 County Food Sales	% of 2020 County Market	2019 Stores	2019 Sales (in millions)	% of 2019 County Market
DC	Washington	5	$193.60	$2,196.50	8.81%	5	$188.20	9.19%
DC Recap: 5 stores with sales of $193.6 million. Total retail food sales for DC in the study: $2.2 billion. Whole Foods share of DC is 8.81%.								
MD	Anne Arundel	1	$48.90	$2,039.70	2.40%	1	$45.30	2.18%
MD	Baltimore City	2	$61.80	$1,368.20	4.52%	2	$60.80	4.45%
MD	Howard	1	$34.10	$1,090.20	3.13%	1	$31.90	3.07%
MD	Montgomery	5	$207.20	$3,412.40	6.07%	5	$198.10	6.14%
MD	Prince George's	1	$30.30	$2,836.10	1.07%	1	$28.10	0.98%
MD Recap: 10 stores with sales of $382.3 million. Total retail food sales for MD in the study: $18.96 billion. Whole Foods share of MD is 2.02%.								
PA	Lancaster	1	$34.40	$1,556.20	2.21%	1	$33.10	2.25%
PA Recap: 1 store with sales of $34.4 million. Total retail food sales for PA in the study: $4.99 billion. Whole Foods share of PA is 0.57%.								
VA	Albemarle	1	$33.20	$579.70	5.73%	1	$32.30	5.71%
VA	Arlington	2	$73.10	$845.70	8.64%	2	$70.90	8.94%
VA	Fairfax	7	$263.70	$4,850.20	5.44%	6	$218.40	4.68%
VA	Hampton/Newport News	1	$29.10	$1,049.80	2.77%	1	$28.30	2.80%
VA	Henrico	2	$41.80	$1,736.30	2.40%	1	$20.40	1.24%
VA	Loudoun	1	$30.60	$1,379.20	2.22%	1	$29.20	2.23%
VA	Virginia Beach	1	$31.50	$1,498.70	2.10%	1	$34.20	2.30%
VA Recap: 15 stores with sales of $503.3 million. Total retail food sales for VA in the study: $21.56 billion. Whole Foods share of VA is 2.33%.								

Mid-Atlantic Recap: 31 stores with sales of $1.11 billion annually. Mid-Atlantic retail food sales total: $50.04 billion.
Whole Foods Per Store Average: $35.91 million

Source: *Food World*, June 2020

Albertsons Preps For IPO; Road Show To Begin

from page 1

vote.

Over the past two years as Albertsons has improved its balance sheet by reducing debt, increasing profit and posting a consecutive string of comp store sales gains, the Boise, ID-based chain with nearly 2,300 supermarkets believed it was finally in a position to test the financial markets again.

On March 6, Albertsons filed a registration statement (S-1) with the SEC and in early May amended it, adding more details about the robust sales it had achieved during the COVID-19 pandemic when its March sales jumped 47 percent.

Late last month, Albertsons announced it would sell a 17.5 percent stake in the company to Apollo Global Management for $1.75 billion of the chain's convertible preferred stock.

With the current announcement, Albertsons is seeking to sell 65.8 million shares of stock at an initial price of $18 to $20 per share, which could raise as much as $1.5 billion.

Albertsons said it is not selling any shares pursuant to the common stock offering. In connection with the offering, certain of the selling stockholders expect to grant the underwriters a 30-day option to purchase an aggregate of 9,870,000 shares of the retailer's common stock. If its public offering is successful, Albertsons will be listed on the New York Stock Exchange (NYSE) under the ticker symbol "ACI." And if successful, it would mark the exit of the chain's primary owner, PE firm Cerberus Capital Management (and several other investors), which has controlled the large retailer since 2006

Additionally, Albertsons will not receive any net proceeds from the sale of common stock by the selling stockholders, including from any exercise by the underwriters of their option to purchase additional shares of its common stock from the selling stockholders.

With the foundation of the deal now revealed, Albertsons can begin its roadshow (probably virtually) to convince other investors that the chain is worthy of publicly-held status. And if all goes well, that might be confirmed within the next month.

Central Pennsylvania Supermarket Leaders:

The Giant Company Supers Share Reaches Record 53.1%; Weis Now At 18.7% Of $3.6B Market

- Acquisitions Extend Giant's Lead
- #2 Weis Share At 18.7%
- C&S Indies Lose Stores, Share
- Karns Grows With Etters Unit
- Indie FOM Shows Strength

Rank	Company	2020 Stores	2020 Sales (in millions)	% of 2020 Market	2019 Stores	2019 Sales (in millions)	% of 2019 Market
1	The Giant Company (Martin's)	48	$1,936.33	53.13%	44	$1,755.01	49.86%
2	Weis Markets	38	$680.00	18.66%	40	$671.89	19.09%
3	C&S Independents	57	$201.23	5.52%	74	$362.88	10.31%
4	Karns Prime & Fancy Foods	9	$154.00	4.23%	8	$137.25	3.90%
5	Wegmans	2	$115.00	3.16%	2	$111.60	3.17%
6	Family Owned Markets	7	$108.70	2.98%	7	$101.20	2.88%
7	Aldi	14	$105.00	2.88%	13	$96.20	2.73%
8	Grocery Outlet	10	$62.10	1.70%	12	$72.90	2.07%
9	Kennie's Markets	4	$45.20	1.24%	4	$44.70	1.27%
10	Redner's Markets	3	$44.00	1.21%	3	$43.60	1.24%
		192	**$3,451.56**	**94.73%**	**207**	**$3,397.23**	**96.52%**

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

Total supermarket sales for the area are $3.63 billion.

Source: *Food World*, June 2020

Central Pennsylvania Market Leaders:

The Giant Company, Weis, Walmart Combine To Control 54.58% Of 8-County $6 Billion Market

- Alternates' Share Dips To 36.3%
- Indie Buys, Big Comps Buoy Giant
- CVS Extends Lead Over Rite Aid
- Sheetz Paces All C-Stores
- Musser's, Fergie's Are Sold

Rank	Company	2020 Stores	2020 Sales (in millions)	% of 2020 Market	2019 Stores	2019 Sales (in millions)	% of 2019 Market
1	The Giant Company (Martin's)	48	$1,936.33	32.33%	44	$1,755.01	30.18%
2	Weis Markets	38	$680.00	11.35%	40	$671.89	11.55%
3	Walmart (SuperCenter)	20	$652.80	10.90%	20	$629.50	10.82%
4	CVS+	72	$314.90	5.26%	72	$305.75	5.26%
5	Sheetz	68	$247.40	4.13%	66	$236.40	4.06%
6	C&S Independents	57	$201.23	3.36%	74	$362.88	6.24%
7	Rite Aid	60	$187.50	3.13%	60	$186.00	3.20%
8	Turkey Hill	116	$164.30	2.74%	116	$159.60	2.74%
9	Target	11	$160.30	2.68%	11	$157.70	2.71%
10	Karns Prime & Fancy Foods	9	$154.00	2.57%	8	$137.25	2.36%
11	Sam's Club	4	$145.70	2.43%	4	$140.40	2.41%
12	Rutter's Farm Stores	67	$120.60	2.01%	67	$118.90	2.04%
13	Wegmans	2	$115.00	1.92%	2	$111.60	1.92%
14	Family Owned Markets	7	$108.70	1.82%	7	$101.20	1.74%
15	Aldi	14	$105.00	1.75%	13	$96.20	1.65%
16	BJ's Wholesale Club	4	$102.50	1.71%	4	$100.80	1.73%
17	Costco	2	$75.20	1.26%	2	$71.60	1.23%
18	Grocery Outlet	10	$62.10	1.04%	12	$72.90	1.25%
19	Kennie's Markets	4	$45.20	0.75%	4	$44.70	0.77%
20	Redner's Markets	3	$44.00	0.73%	3	$43.60	0.75%
		616	**$5,622.76**	**93.89%**	**629**	**$5,503.88**	**93.78%**

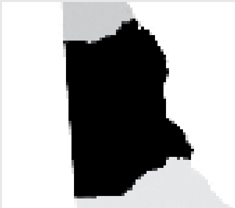
The chart above lists the top 20 retailers in the Central Pennsylvania market which sell groceries, HBC, drugs, general merchandise and tobacco products. Volumes listed include 100% of store sales for supermarkets, c-stores and drug chains. Sales for club stores, Kmart, Target and Walmart are extrapolated to include comparable categories, as explained in the formula on page 85. Petroleum sales are not included. Counties/cities included are: Adams, Cumberland, Dauphin, Franklin, Lancaster, Lebanon, Perry and York. ( ) Indicates another banner used by the company.

Total food sales for the area are: $5.99 billion.

Source: *Food World*, June 2020

DELAWARE COUNTY SHARE OF MARKET: 2020

Total sales for those Delaware counties included in the study are $1.33 billion



KENT COUNTY ($466.7 million)
(Includes Dover, Harrington, Smyrna)

- Population 180,786
- # of households 64,545
- Median income $58,775
- Under age 18...................... 22.9%
- Over age 65........................ 17.1%
- Female 51.8%
- White 60.9%
- Black.................................. 26.8%
- Hispanic 7.4%
- Asian................................... 2.4%

Rank	Company	Stores	Sales (in millions)	% of Market
1	Redner's Markets	3	$63.50	13.61%
2	Walmart (SuperCenter)	2	$55.80	11.96%
3	Wawa	7	$51.80	11.10%
4	Sam's Club	1	$41.50	8.89%
5	Walgreens	8	$33.40	7.16%
6	Food Lion	4	$27.90	5.98%
7	Acme Markets	1	$23.20	4.97%
8	Rite Aid	6	$23.10	4.95%
9	Safeway	1	$21.76	4.66%
10	Fas-Marts	14	$19.20	4.11%
11	Military Commissaries	1	$17.12	3.67%
12	CVS+	3	$15.80	3.39%
13	Aldi	2	$15.20	3.26%
14	Royal Farm Stores	8	$14.90	3.19%
15	Target	1	$13.90	2.98%
16	International Markets	1	$9.70	2.08%
17	C&S Independents	3	$5.17	1.11%
18	Save-A-Lot	1	$4.70	1.01%
19	7-Eleven	1	$2.40	0.51%
		68	**$460.05**	**98.58%**

SUSSEX COUNTY ($864.8 million)
(Includes Bethany Beach, Millville, Seaford)

- Population 234,225
- # of households 89,365
- Median income $60,853
- Under age 18...................... 18.6%
- Over age 65........................ 27.7%
- Female 51.7%
- White 75.3%
- Black.................................. 12.3%
- Hispanic 9.3%
- Asian................................... 1.3%

Rank	Company	Stores	Sales (in millions)	% of Market
1	Giant Food	4	$147.04	17.00%
2	Food Lion	9	$124.70	14.42%
3	Walmart (SuperCenter)	4	$119.70	13.84%
4	Walgreens	14	$71.00	8.21%
5	Wawa	8	$54.27	6.28%
6	Weis Markets	4	$50.30	5.82%
7	Redner's Markets	2	$44.20	5.11%
8	Royal Farm Stores	20	$41.40	4.79%
9	BJ's Wholesale Club	1	$36.10	4.17%
10	Harris Teeter	2	$35.20	4.07%
11	Acme Markets	1	$32.40	3.75%
12	C&S Independents	5	$31.53	3.65%
13	CVS	6	$29.80	3.45%
14	Rite Aid	10	$28.90	3.34%
15	Save-A-Lot	3	$15.40	1.78%
16	Safeway	1	$14.47	1.67%
17	Fas-Marts	10	$13.10	1.51%
18	Fresh Market	1	$12.70	1.47%
19	International Markets	1	$8.70	1.01%
20	Kmart	1	$4.70	0.54%
		107	**$915.61**	**105.88%***

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

Source: *Food World*, June 2020

PENNSYLVANIA COUNTY SHARE OF MARKET: 2020

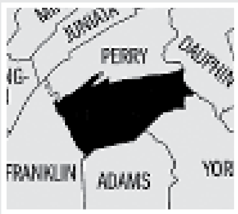
Total sales for those Pennsylvania counties included in the study are $4.99 billion

Rank	Company	Stores	Sales (in millions)	% of Market

ADAMS COUNTY ($185.1 million)
(Includes Gettysburg, Littlestown)

- Population 103,009
- # of households 39,221
- Median income $64,507
- Under age 18...................... 20.0%
- Over age 65........................ 20.4%
- Female 50.8%
- White 89.0%
- Black.................................. 2.0%
- Hispanic 7.1%
- Asian.................................. 0.9%

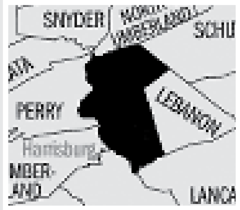
Rank	Company	Stores	Sales (in millions)	% of Market
1	The Giant Company	1	$52.63	28.43%
2	Kennie's Markets	3	$33.30	17.99%
3	Weis Markets	2	$28.30	15.29%
4	Walmart	1	$18.90	10.21%
5	Sheetz	4	$16.40	8.86%
6	Rutter's Farm Stores	4	$7.90	4.27%
7	7-Eleven	3	$6.10	3.30%
8	Rite Aid	2	$5.60	3.03%
9	CVS	1	$4.70	2.54%
10	Turkey Hill	2	$2.90	1.57%
11	Royal Farm Stores	1	$2.40	1.30%
12	C&S Independents	1	$0.20	0.11%
		25	**$179.33**	**96.88%**



CUMBERLAND COUNTY ($1 billion)
(Includes Carlisle, Mechanicsville)

- Population 253,370
- # of households 98,877
- Median income $68,895
- Under age 18...................... 20.3%
- Over age 65........................ 18.5%
- Female 50.5%
- White 85.2%
- Black.................................. 4.4%
- Hispanic 4.1%
- Asian.................................. 4.6%

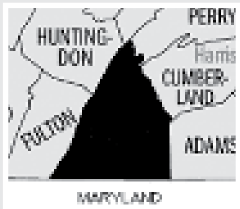
Rank	Company	Stores	Sales (in millions)	% of Market
1	The Giant Company	9	$396.02	39.31%
2	Walmart (SuperCenter)	4	$104.20	10.34%
3	Weis Markets	5	$81.30	8.07%
4	Karns Prime & Fancy Foods	4	$72.00	7.15%
5	CVS+	14	$61.30	6.08%
6	Wegmans	1	$55.70	5.53%
7	Sheetz	13	$45.70	4.54%
8	Rite Aid	12	$41.90	4.16%
9	BJ's Wholesale Club	1	$34.80	3.45%
10	Sam's Club	1	$29.10	2.89%
11	Target	2	$28.20	2.80%
12	Aldi	3	$20.80	2.06%
13	Turkey Hill	8	$12.00	1.19%
14	Military Commissaries	1	$11.67	1.16%
15	Rutter's Farm Stores	4	$7.80	0.77%
16	Grocery Outlet	1	$6.80	0.67%
17	7-Eleven	1	$2.20	0.22%
		84	**$1,011.49**	**100.4%***



DAUPHIN COUNTY ($926.5 million)
(Includes Harrisburg, Middletown, Millersburg)

- Population 278,299
- # of households 111,684
- Median income $58,916
- Under age 18...................... 22.5%
- Over age 65........................ 17.0%
- Female 51.6%
- White 65.1%
- Black.................................. 19.2%
- Hispanic 9.6%
- Asian.................................. 5.0%

Rank	Company	Stores	Sales (in millions)	% of Market
1	The Giant Company	8	$377.06	40.70%
2	Walmart (SuperCenter)	2	$71.80	7.75%
3	Weis Markets	4	$56.90	6.14%
4	CVS+	13	$56.10	6.06%
5	Karns Prime & Fancy Foods	3	$52.00	5.61%
6	Sheetz	12	$49.60	5.35%
7	Costco	1	$45.30	4.89%
8	Rite Aid	12	$37.70	4.07%
9	Sam's Club	1	$31.90	3.44%
10	Target	2	$24.50	2.64%
11	Turkey Hill	16	$19.30	2.08%
12	Aldi	2	$17.80	1.92%
13	ShopRite	1	$14.70	1.59%
14	C&S Independents	8	$11.85	1.28%
15	Sharp Shopper	1	$10.40	1.12%
16	7-Eleven	5	$10.30	1.11%
17	Boyer's Markets	1	$9.51	1.03%
18	Save-A-Lot	1	$5.90	0.64%
19	Rutter's Farm Stores	2	$4.40	0.47%
		95	**$907.02**	**97.90%**



FRANKLIN COUNTY ($413.5 million)
(Includes Chambersburg, Greencastle, Waynesboro)

- Population 155,027
- # of households 60,210
- Median income $59,713
- Under age 18...................... 22.2%
- Over age 65........................ 19.6%
- Female 50.9%
- White 87.7%
- Black.................................. 4.1%
- Hispanic 5.9%
- Asian.................................. 1.1%

Rank	Company	Stores	Sales (in millions)	% of Market
1	The Giant Company (Martin's)	4	$124.78	30.18%
2	Walmart (SuperCenter)	2	$73.70	17.82%
3	Weis Markets	2	$30.40	7.35%
4	Sheetz	8	$28.60	6.92%
5	BJ's Wholesale Club	1	$26.70	6.46%
6	Great Valu	2	$21.30	5.15%
7	CVS+	5	$20.20	4.89%
8	Target	1	$14.70	3.56%
9	Rite Aid	4	$14.50	3.51%
10	Rutter's Farm Stores	7	$14.50	3.51%
11	Food Lion	1	$10.00	2.42%
12	Save-A-Lot	2	$7.50	1.81%

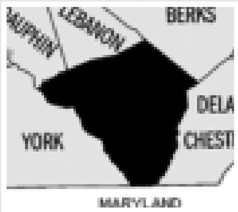
See **PENNSYLVANIA COUNTY SHARE** on page 82


weis markets
In gratitude and appreciation to our associates for their work during challenging times and to our vendors and brokers who help support our business.
Thank You!
weis markets

PENNSYLVANIA COUNTY SHARE OF MARKET: 2020

Continued from page 80

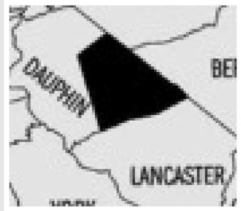
13	Aldi	1	$7.00	1.69%
14	Grocery Outlet	1	$6.30	1.52%
15	Walgreens	1	$5.20	1.26%
16	C&S Independents	3	$3.80	0.92%
17	Turkey Hill	1	$2.10	0.51%
		46	**$411.28**	**99.46%**



LANCASTER COUNTY ($1.6 billion) (Includes Lancaster, Ephrata)

- Population 545,724
- # of households 199,889
- Median income $63,823
- Under age 18...................... 23.5%
- Over age 65........................ 17.9%
- Female 51.0%
- White 81.6%
- Black.................................. 5.2%
- Hispanic 10.8%
- Asian.................................. 2.5%

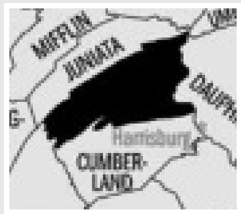
1	The Giant Company	12	$422.77	27.17%
2	Weis Markets	13	$245.60	15.78%
3	C&S Independents	22	$120.83	7.76%
4	Walmart (SuperCenter)	3	$118.70	7.63%
5	CVS+	22	$99.10	6.37%
6	Turkey Hill	61	$89.30	5.74%
7	Family Owned Markets	4	$74.90	4.81%
8	Wegmans	1	$59.30	3.81%
9	Sheetz	15	$51.80	3.33%
10	Target	3	$46.10	2.96%
11	Whole Foods	1	$34.40	2.21%
12	Costco	1	$29.90	1.92%
13	Aldi	4	$29.60	1.90%
14	Grocery Outlet	4	$23.30	1.50%
15	BJ's Wholesale Club	1	$22.60	1.45%
16	Sharp Shopper	2	$20.60	1.32%
17	Wawa	4	$20.40	1.31%
18	Rite Aid	6	$16.30	1.05%
19	Kmart	3	$14.90	0.96%
20	Redner's Markets	1	$13.10	0.84%
21	Rutter's Farm Stores	4	$8.80	0.57%
22	Walgreens	1	$5.10	0.33%
23	Save-A-Lot	1	$4.70	0.30%
24	Royal Farm Stores	1	$2.10	0.13%
		190	**$1,574.20**	**101.16%***



LEBANON COUNTY ($379.4 million) (Includes Lebanon)

- Population 141,793
- # of households 53,281
- Median income $59,114
- Under age 18...................... 22.7%
- Over age 65........................ 19.4%
- Female 50.9%
- White 81.5%
- Black.................................. 3.7%
- Hispanic 13.8%
- Asian.................................. 1.6%

1	The Giant Company	3	$84.68	22.32%
2	Walmart (SuperCenter)	2	$76.90	20.27%
3	Weis Markets	3	$50.10	13.21%
4	C&S Independents	7	$40.53	10.68%
5	Redner's Markets	2	$30.90	8.14%
6	Rite Aid	5	$16.20	4.27%
7	CVS+	4	$15.90	4.19%
8	Turkey Hill	11	$15.10	3.98%
9	ShopRite	1	$12.30	3.24%
10	Sheetz	2	$8.70	2.29%
11	America's Food Basket (Ideal)	2	$7.60	2.00%
12	Save-A-Lot	1	$6.60	1.74%
13	Aldi	1	$6.20	1.63%
14	Grocery Outlet	1	$5.90	1.56%
15	Rutter's Farm Stores	2	$4.50	1.19%
16	IGA	1	$3.00	0.79%
		47	**$385.11**	**101.50%***



PERRY COUNTY ($99.6 million) (Includes New Bloomfield)

- Population 46,272
- # of households 18,091
- Median income $62,266
- Under age 18...................... 21.4%
- Over age 65........................ 18.5%
- Female 49.4%
- White 95.1%
- Black.................................. 1.1%
- Hispanic 2.1%
- Asian.................................. 0.5%

1	The Giant Company	1	$22.69	22.78%
2	Weis Markets	1	$16.00	16.06%
3	Karns Prime & Fancy Foods	1	$14.00	14.06%
4	Tri-State Co-Op	1	$13.80	13.86%
5	Rite Aid	3	$12.80	12.85%
6	Sheetz	2	$10.10	10.14%
7	C&S Independents	5	$5.61	5.63%
8	Rutter's Farm Stores	1	$2.10	2.11%
		15	**$97.10**	**97.49%**

See **PENNSYLVANIA COUNTY SHARE** on page 84

IN REVIEW: WEIS MARKETS

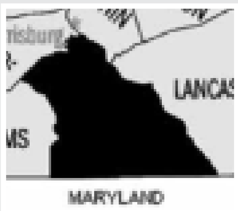
State	County	2020 Stores	2020 Sales (in millions)	2020 County Food Sales	% of 2020 County Market	2019 Stores	2019 Sales (in millions)	% of 2019 County Market
DE	Sussex	4	$50.30	$864.80	5.82%	4	$44.27	5.38%
DE Recap: 4 stores with sales of $50.3 million. Total retail food sales for DE in the study: $1.33 billion. Weis Markets share of DE is 3.78%.								
MD	Anne Arundel	3	$39.80	$2,039.70	1.95%	3	$34.82	1.68%
MD	Baltimore County	12	$230.10	$2,929.60	7.85%	12	$216.43	7.62%
MD	Calvert	3	$34.60	$349.70	9.89%	3	$30.49	9.10%
MD	Carroll	5	$81.00	$595.40	13.60%	5	$77.52	13.29%
MD	Charles	1	$9.40	$449.80	2.09%	1	$8.57	1.85%
MD	Frederick	6	$112.90	$827.60	13.64%	6	$105.81	13.39%
MD	Harford	2	$36.90	$929.60	3.97%	2	$34.97	3.99%
MD	Howard	4	$66.70	$1,090.20	6.12%	4	$65.27	6.27%
MD	Montgomery	3	$32.00	$3,412.40	0.94%	3	$31.01	0.96%
MD	Prince George's	3	$33.30	$2,836.10	1.17%	3	$31.94	1.12%
MD	St. Mary's	2	$27.80	$352.60	7.88%	3	$23.88	6.76%
MD	Talbot	1	$7.90	$196.20	4.03%	1	$7.86	4.09%
MD	Washington	3	$56.50	$461.20	12.25%	3	$54.28	12.03%
MD Recap: 48 stores with sales of $768.9 million. Total retail food sales for MD in the study: $18.96 billion. Weis Markets share of MD is 4.05%.								
PA	Adams	2	$28.30	$185.10	15.29%	2	$25.60	14.07%
PA	Cumberland	5	$81.30	$1,007.50	8.07%	5	$78.58	7.90%
PA	Dauphin	4	$56.90	$926.50	6.14%	6	$71.90	7.63%
PA	Franklin	2	$30.40	$413.50	7.35%	2	$27.84	7.03%
PA	Lancaster	13	$245.60	$1,556.20	15.78%	13	$238.11	16.16%
PA	Lebanon	3	$50.10	$379.40	13.21%	3	$47.65	13.02%
PA	Perry	1	$16.00	$99.60	16.06%	1	$15.42	16.69%
PA	York	8	$171.40	$1,420.80	12.06%	8	$166.79	12.18%
PA Recap: 38 stores with sales of $680.0 million. Total retail food sales for PA in the study: $4.99 billion. Weis Markets share of PA is 11.35%.								
VA	Culpeper	1	$9.30	$140.50	6.62%	2	$14.74	10.41%
VA	Spotsylvania	5	$42.70	$693.80	6.15%	6	$48.40	7.09%
VA	Stafford	3	$33.00	$366.20	9.01%	4	$42.22	12.24%
VA Recap: 9 stores with sales of $85.0 million. Total retail food sales for VA in the study: $21.56 billion. Weis Markets share of VA is 0.39%.								

Mid-Atlantic Recap: 99 stores with sales of $1.58 billion annually. Mid-Atlantic retail food sales total: $50.04 billion.
Weis Markets Per Store Average: $16 million

Source: *Food World,* June 2020

PENNSYLVANIA COUNTY SHARE OF MARKET: 2020

Continued from page 82



YORK COUNTY ($1.4 billion)
(Includes Hanover, Shrewsbury, York)

- Population 449,058
- # of households 171,244
- Median income $63,902
- Under age 18........ 22.1%
- Over age 65........ 17.4%
- Female 50.6%
- White 82.9%
- Black........ 7.0%
- Hispanic 7.9%
- Asian........ 1.5%

1	The Giant Company	10	$455.70	32.07%
2	Walmart (SuperCenter)	6	$188.60	13.27%
3	Weis Markets	8	$171.40	12.06%
4	Sam's Club	2	$84.70	5.96%
5	Rutter's Farm Stores	43	$70.60	4.97%
6	CVS+	13	$57.60	4.05%
7	Target	3	$46.80	3.29%
8	Rite Aid	16	$42.50	2.99%
9	Sheetz	12	$36.50	2.57%
10	Family Owned Markets	3	$33.80	2.38%
11	Aldi	3	$23.60	1.66%
12	Turkey Hill	17	$23.60	1.66%
13	Royal Farm Stores	8	$19.90	1.40%
14	Grocery Outlet	3	$19.80	1.39%
15	C&S Independents	11	$18.41	1.30%
16	BJ's Wholesale Club	1	$18.40	1.30%
17	Karns Prime & Fancy Foods	1	$16.00	1.13%
18	Walgreens	3	$15.60	1.10%
19	ShopRite	1	$13.10	0.92%
20	Great Valu	1	$12.20	0.86%
21	Kennie's Markets	1	$11.90	0.84%
22	IGA	1	$11.70	0.82%
23	Lidl	1	$5.90	0.42%
24	Food Lion	1	$4.50	0.32%
25	Save-A-Lot	1	$4.20	0.30%
		170	**$1,407.01**	**99.03%**

( ) 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.

+ Stand-alone CVS and in-Target pharmacies

Source: *Food World*, June 2020

from page 18

that it closed a Neighborhood Market (in Chesterfield) over the past 12 months. Number two Kroger struggled for most of the year, but was helped by impressive comp store gains during the month of March. New store activity came from Publix with two new units, Whole Foods, which finally opened its second Richmond store (after nearly a decade of waiting) and Walgreens, which cut the ribbon on nine stores that were formerly Rite Aids. The top three merchants in the $3.6 billion area - Walmart, Kroger and Food Lion - collectively controlled 47.4 percent of the eight-county market.

Tidewater

Another intensely competitive marketing area, with Food Lion and Walmart continuing to dominate, controlling a combined 33.9 percent of the food and drug business in Hampton Roads. Harris Teeter and parent company Kroger both added stores that were formerly Farm Fresh units (both chains also opened other Farm Fresh stores they acquired last year) and discounter Aldi added three more stores during the past 12 months. Convenience store juggernaut 7-Eleven maintained its third palace standing in the $5.4 billion market, operating an impressive 280 c-stores in the 10 county/city area. The biggest new store impact came from Wegmans which opened its first Hampton Roads unit in April 2019 which has garnered big sales from the outset. And one declining trend continued: the five military commissaries in the market (the highest concentration of any place in the entire Mid-Atlantic) continued their volume declines. Sales decreased $10 million over the past 12 months. Those five installations now annually amass $194.2 million.

How We Do It?

This is the 42nd 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, 2019 through March 31, 2020.

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

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

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

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

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

Because of record level food and HBC sales that virtually all retailers achieved during March, we have adjusted the extrapolated sales in those areas that mass merchants and club stores amassed during the year, due to the robust sales they experienced in March, the last month of our measuring period.

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

At Target, that food/drug percentage has been increase from 44 to 46 percent and for the three Super Target stores in Northern Virginia we have elevated the extrapolation from 52 to 54 percent.

At Kmart, which continues to close stores and bleed sales, we have raised the percentage of grocery, HBC and GM from 36 to 37 percent.

The three club operators - Costco, BJ's and Sam's Club - also experienced highly skewed sales toward grocery and HBC (in fact, some departments like jewelry and optical were closed during March). Their percentage of grocery and HBC also increased during the COVID-19 pandemic and we have increased their totals (as a percent of overall sales) from 65 to 67 percent.

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

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

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

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

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

And of course, as I do each year at this time, I want to give a special shout out to my retired partner and friend, Dick Bestany. Hard to believe we took a dream we first had in New England in 1978 and turned into something so fulfilling. Dick just turned 81 – that in itself is hard to fathom.

Our MVP again is Terri Maloney, our VP-Editorial Director, who starts the engine on a detailed, and at times, exhausting task. Terri's been with us for 31 years and is responsible for data collection (which involves hundreds of changes each year), IT through-put, pre-press coordination, proofreading and printer communication. It's a long, grinding process that she seems to relish in her role as editorial team leader.

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

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

It seems like another lifetime ago when I began my career with *The Griffin Report* in New England in late 1973.

I've always prided myself on being able to keep up with change by understanding the nuances of influential retailers and their leaders. It's no secret that by gaining face-to-face access with many great minds and interesting personalities, I've been able to stay in the game and hopefully remain relevant.

However, I must admit that the past four months have been unlike any other in my lifetime. Those involved in our business – at any level – deserve tremendous praise for their bravery and perseverance.

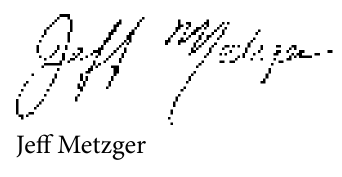
From purely a business perspective, it's a great time to be a retailer who sells food.

But, that, too, is bittersweet. The sickness and death are visceral – we all feel it. And the future is worrisome, with a possible second wave of COVID-19 ahead and scary unemployment levels to boot.

We'll get through this because I firmly believe that, emotionally, our grit and resiliency will prevail. And with the help of science and medical research (and public common sense), this pandemic won't bring us down.

To our readers – thanks for your loyalty. And to our advertisers – we deeply appreciate your continued support and friendship.

Stay Safe,



Jeff Metzger

IN REVIEW: SAFEWAY

State	County	2020 Stores	2020 Sales (in millions)	2020 County Food Sales	% of 2020 County Market	2019 Stores	2019 Sales (in millions)	% of 2019 County Market
DC	Washington	11	$294.66	$2,196.50	13.41%	12	$312.05	15.23%
DC Recap: 11 stores with sales of $294.66 million. Total retail food sales for DC in the study: $2.2 billion. Safeway share of DC is 13.41%.								
DE	Kent	1	$21.76	$466.70	4.66%	1	$22.01	4.76%
DE	Sussex	1	$14.47	$864.80	1.67%	1	$14.74	1.79%
DE Recap: 2 stores with sales of $36.23 million. Total retail food sales for DE in the study: $1.33 billion. Safeway share of DE is 2.72%.								
MD	Anne Arundel	8	$189.43	$2,039.70	9.29%	8	$192.36	9.28%
MD	Baltimore City	3	$69.13	$1,368.20	5.05%	3	$69.01	5.05%
MD	Baltimore County	6	$109.35	$2,929.60	3.73%	6	$114.01	4.01%
MD	Calvert	2	$50.79	$349.70	14.52%	2	$53.66	16.01%
MD	Carroll	3	$83.18	$595.40	13.97%	3	$85.81	14.71%
MD	Charles	3	$79.58	$449.80	17.69%	3	$82.45	17.80%
MD	Frederick	2	$28.99	$827.60	3.50%	2	$29.85	3.78%
MD	Harford	1	$26.29	$929.60	2.83%	1	$27.28	3.11%
MD	Howard	3	$63.83	$1,090.20	5.85%	3	$67.02	6.44%
MD	Montgomery	18	$389.29	$3,412.40	11.41%	18	$405.16	12.56%
MD	Prince George's	9	$208.10	$2,836.10	7.34%	9	$214.40	7.50%
MD	Queen Anne's	1	$39.84	$130.60	30.51%	1	$41.15	31.56%
MD Recap: 59 stores with sales of $1.34 billion. Total retail food sales for MD in the study: $18.96 billion. Safeway share of MD is 7.05%.								
VA	Arlington	4	$64.85	$845.70	7.67%	4	$63.33	7.98%
VA	Culpeper	1	$10.57	$140.50	7.52%	1	$10.15	7.17%
VA	Fairfax	24	$470.81	$4,850.20	9.71%	25	$493.72	10.57%
VA	Fauquier	1	$15.16	$166.30	9.12%	1	$15.92	10.22%
VA	Loudoun	4	$45.76	$1,379.20	3.32%	4	$47.89	3.67%
VA	Prince William	4	$60.50	$1,688.30	3.58%	4	$62.17	3.68%
VA Recap: 38 stores with sales of $667.65 million. Total retail food sales for VA in the study: $21.56 billion. Safeway share of VA is 3.1%.								

Mid-Atlantic Recap: 110 stores with sales of $2.34 billion annually. Mid-Atlantic retail food sales total: $50.04 billion.
Safeway Per Store Average: $21.24 million

Source: *Food World,* June 2020

IN REVIEW: KROGER

State	County	2020 Stores	2020 Sales (in millions)	2020 County Food Sales	% of 2020 County Market	2019 Stores	2019 Sales (in millions)	% of 2019 County Market
VA	Albemarle	3	$121.30	$579.70	20.92%	3	$119.40	21.09%
VA	Chesapeake City (Marketplace)	5	$132.30	$820.40	16.13%	3	$77.30	10.42%
VA	Chesterfield (Marketplace)	7	$243.40	$1,299.90	18.72%	7	$241.60	19.24%
VA	Gloucester	1	$18.70	$112.90	16.56%	1	$18.40	16.59%
VA	Hampton/Newport News (Mktplace)	2	$41.60	$1,049.80	3.96%	1	$20.10	1.99%
VA	Hanover (Marketplace)	2	$83.70	$424.30	19.73%	2	$86.30	21.11%
VA	Henrico (Marketplace)	9	$275.60	$1,736.30	15.87%	9	$273.80	16.66%
VA	Isle Of Wight	1	$24.00	$82.30	29.16%	1	$23.70	27.98%
VA	Norfolk City	1	$20.90	$718.40	2.91%	1	$20.70	2.88%
VA	Portsmouth City (Marketplace)	1	$35.10	$279.10	12.58%	1	$34.70	12.79%
VA	Suffolk City (Marketplace)	2	$62.30	$277.80	22.43%	2	$62.10	23.77%
VA	Virginia Beach (Marketplace)	5	$130.70	$1,498.70	8.72%	5	$136.20	9.18%
VA	York	2	$37.80	$163.70	23.09%	2	$37.60	23.24%

VA Recap: 41 stores with sales of $1.23 billion. Total retail food sales for VA in the study: $21.56 billion. Kroger share of VA is 5.69%.

Mid-Atlantic Recap: 41 stores with sales of $1.23 billion. Mid-Atlantic retail food sales total: $50.04 billion.
Kroger Per Store Average: $29.94 million. ( ) Name in parentheses indicates another banner used by the company.

Source: *Food World,* June 2020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IN REVIEW: COSTCO

State	County	2020 Stores	2020 Sales (in millions)	2020 County Food Sales	% of 2020 County Market	2019 Stores	2019 Sales (in millions)	% of 2019 County Market
DC	Washington	1	$55.10	$2,196.50	2.51%	1	$52.90	2.58%

DC Recap: 1 store with sales of $55.1 million. Total retail food sales for DC in the study: $2.2 billion. Costco share of DC is 2.51%.

State	County	2020 Stores	2020 Sales (in millions)	2020 County Food Sales	% of 2020 County Market	2019 Stores	2019 Sales (in millions)	% of 2019 County Market
MD	Anne Arundel	2	$97.50	$2,039.70	4.78%	2	$93.80	4.52%
MD	Baltimore County	2	$105.70	$2,929.60	3.61%	2	$100.60	3.54%
MD	Frederick	1	$47.60	$827.60	5.75%	1	$45.10	5.71%
MD	Howard	1	$50.10	$1,090.20	4.60%	1	$48.10	4.62%
MD	Montgomery	2	$147.40	$3,412.40	4.32%	2	$140.70	4.36%
MD	Prince George's	3	$150.60	$2,836.10	5.31%	3	$144.30	5.05%

MD Recap: 11 stores with sales of $598.9 million. Total retail food sales for MD in the study: $18.96 billion. Costco share of MD is 3.16%.

State	County	2020 Stores	2020 Sales (in millions)	2020 County Food Sales	% of 2020 County Market	2019 Stores	2019 Sales (in millions)	% of 2019 County Market
PA	Dauphin	1	$45.30	$926.50	4.89%	1	$43.10	4.58%
PA	Lancaster	1	$29.90	$1,556.20	1.92%	1	$28.50	1.93%

PA Recap: 2 stores with sales of $75.2 million. Total retail food sales for PA in the study: $4.99 billion. Costco share of PA is 1.26%.

State	County	2020 Stores	2020 Sales (in millions)	2020 County Food Sales	% of 2020 County Market	2019 Stores	2019 Sales (in millions)	% of 2019 County Market
VA	Albemarle	1	$34.70	$579.70	5.99%	1	$33.00	5.83%
VA	Arlington	1	$61.40	$845.70	7.26%	1	$58.40	7.36%
VA	Chesterfield	1	$43.20	$1,299.90	3.32%	1	$41.00	3.26%
VA	Fairfax	4	$326.50	$4,850.20	6.73%	4	$312.80	6.70%
VA	Frederick	1	$41.80	$457.30	9.14%	1	$40.00	9.31%
VA	Hampton/Newport News	1	$33.90	$1,049.80	3.23%	1	$32.40	3.20%
VA	Henrico	1	$39.50	$1,736.30	2.27%	1	$37.70	2.29%
VA	Loudoun	2	$135.40	$1,379.20	9.82%	2	$129.60	9.92%
VA	Norfolk City	1	$39.60	$718.40	5.51%	1	$38.00	5.28%
VA	Prince William	2	$70.20	$1,688.30	4.16%	2	$67.50	4.00%
VA	Spotsylvania	1	$29.40	$693.80	4.24%	1	$27.90	4.09%

VA Recap: 16 stores with sales of $855.6 million. Total retail food sales for VA in the study: $21.56 billion. Costco share of VA is 3.97%.

Mid-Atlantic Recap: 30 stores with sales of $1.58 billion annually. Mid-Atlantic retail food sales total: $50.04 billion.
Costco Per Store Average: $52.83 million

Source: *Food World,* June 2020

IN REVIEW: THE GIANT COMPANY

State	County	2020 Stores	2020 Sales (in millions)	2020 County Food Sales	% of 2020 County Market	2019 Stores	2019 Sales (in millions)	% of 2019 County Market
MD	Carroll	1	$63.62	$595.40	10.69%	1	$60.10	10.31%
MD	Cecil	1	$48.92	$251.60	19.44%	1	$45.82	18.89%
MD	Washington	4	$141.61	$461.20	30.70%	3	$123.87	27.45%

MD Recap: 6 stores with sales of $254.15 million. Total retail food sales for MD in the study: $18.96 billion. The Giant Company share of MD is 1.34%.

State	County	2020 Stores	2020 Sales (in millions)	2020 County Food Sales	% of 2020 County Market	2019 Stores	2019 Sales (in millions)	% of 2019 County Market
PA	Adams	1	$52.63	$185.10	28.43%	1	$51.37	28.24%
PA	Cumberland	9	$396.02	$1,007.50	39.31%	9	$380.29	38.25%
PA	Dauphin	8	$377.06	$926.50	40.70%	8	$360.85	38.31%
PA	Franklin (Martin's)	4	$124.78	$413.50	30.18%	3	$104.33	26.33%
PA	Lancaster	12	$422.77	$1,556.20	27.17%	10	$332.96	22.60%
PA	Lebanon	3	$84.68	$379.40	22.32%	2	$59.67	16.30%
PA	Perry	1	$22.69	$99.60	22.78%	1	$22.56	24.42%
PA	York	10	$455.70	$1,420.80	32.07%	10	$442.98	32.34%

PA Recap: 48 stores with sales of $1.94 billion. Total retail food sales for PA in the study: $4.99 billion. The Giant Company share of PA is 32.33%.

State	County	2020 Stores	2020 Sales (in millions)	2020 County Food Sales	% of 2020 County Market	2019 Stores	2019 Sales (in millions)	% of 2019 County Market
VA	Culpeper (Martin's)	1	$32.73	$140.50	23.30%	1	$30.83	21.77%
VA	Frederick (Martin's)	3	$126.36	$457.30	27.63%	3	$116.42	27.10%
VA	Warren (Martin's)	1	$47.84	$140.20	34.12%	1	$43.84	32.55%

VA Recap: 5 stores with sales of $206.93 million. Total retail food sales for VA in the study: $21.56 billion. The Giant Company share of VA is 0.96%.

Mid-Atlantic Recap: 59 stores with sales of $2.4 billion annually. Mid-Atlantic retail food sales total: $50.04 billion.
The Giant Company Per Store Average: $40.63 million

( ) Indicates another banner used by the company.

Source: *Food World,* June 2020


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IN REVIEW: CVS

State	County	2020 Stores	2020 Sales (in millions)	2020 County Food Sales	% of 2020 County Market	2019 Stores	2019 Sales (in millions)	% of 2019 County Market
DC	Washington+	63	$477.30	$2,196.50	21.73%	61	$440.60	21.51%
DC Recap: 63 stores with sales of $477.3 million. Total retail food sales for DC in the study: $2.2 billion. CVS share of DC is 21.73%.								
DE	Kent+	3	$15.80	$466.70	3.39%	3	$14.50	3.13%
DE	Sussex	6	$29.80	$864.80	3.45%	6	$29.20	3.55%
DE Recap: 9 stores with sales of $45.6 million. Total retail food sales for DE in the study: $1.33 billion. CVS share of DE is 3.42%.								
MD	Anne Arundel+	21	$107.20	$2,039.70	5.26%	21	$102.20	4.93%
MD	Baltimore City+	17	$88.20	$1,368.20	6.45%	16	$82.80	6.05%
MD	Baltimore County+	25	$132.70	$2,929.60	4.53%	20	$101.90	3.59%
MD	Calvert	3	$13.10	$349.70	3.75%	3	$12.70	3.79%
MD	Carroll+	5	$25.10	$595.40	4.22%	5	$24.80	4.25%
MD	Cecil	1	$4.50	$251.60	1.79%	1	$4.40	1.81%
MD	Charles+	8	$37.70	$449.80	8.38%	8	$36.90	7.97%
MD	Frederick+	13	$64.20	$827.60	7.76%	13	$61.30	7.76%
MD	Harford+	8	$32.10	$929.60	3.45%	8	$30.30	3.46%
MD	Howard+	10	$41.80	$1,090.20	3.83%	10	$41.22	3.96%
MD	Montgomery+	46	$426.50	$3,412.40	12.50%	46	$312.80	9.70%
MD	Prince George's+	49	$253.60	$2,836.10	8.94%	48	$239.70	8.39%
MD	Queen Anne's	1	$5.30	$130.60	4.06%	1	$5.20	3.99%
MD	St. Mary's+	5	$18.20	$352.60	5.16%	5	$18.70	5.29%
MD	Talbot+	2	$7.10	$196.20	3.62%	2	$6.90	3.59%
MD	Washington+	7	$20.80	$461.20	4.51%	7	$22.70	5.03%
MD	Wicomico+	2	$6.50	$263.40	2.47%	2	$6.40	2.47%
MD	Worcester	3	$17.40	$209.70	8.30%	3	$17.10	8.35%
MD Recap: 226 stores with sales of $1.3 billion. Total retail food sales for MD in the study: $18.96 billion. CVS share of MD is 6.87%.								
PA	Adams	1	$4.70	$185.10	2.54%	1	$4.50	2.47%
PA	Cumberland	14	$61.30	$1,007.50	6.08%	14	$59.10	5.94%
PA	Dauphin+	13	$56.10	$926.50	6.06%	13	$55.25	5.87%
PA	Franklin+	5	$20.20	$413.50	4.89%	5	$19.80	5.00%
PA	Lancaster+	22	$99.10	$1,556.20	6.37%	22	$95.60	6.49%
PA	Lebanon	4	$15.90	$379.40	4.19%	4	$15.60	4.26%
PA	York+	13	$57.60	$1,420.80	4.05%	13	$55.90	4.08%
PA Recap: 72 stores with sales of $314.9 million. Total retail food sales for PA in the study: $4.99 billion. CVS share of PA is 5.26%.								
VA	Accomack	1	$4.00	$85.90	4.66%	1	$3.90	4.65%
VA	Albemarle+	8	$28.40	$579.70	4.90%	8	$27.60	4.88%
VA	Arlington+	15	$80.60	$845.70	9.53%	15	$77.80	9.81%
VA	Caroline	1	$3.90	$29.90	13.04%	1	$4.30	15.75%
VA	Chesapeake City+	6	$35.80	$820.40	4.36%	6	$35.00	4.72%
VA	Chesterfield+	22	$94.70	$1,299.90	7.29%	22	$88.90	7.08%
VA	Culpeper+	2	$6.60	$140.50	4.70%	2	$6.50	4.59%
VA	Dinwiddie	1	$5.20	$123.20	4.22%	1	$5.00	4.10%
VA	Fairfax+	65	$299.60	$4,850.20	6.18%	64	$280.30	6.00%
VA	Fauquier	2	$7.20	$166.30	4.33%	2	$7.70	4.95%
VA	Frederick+	8	$27.80	$457.30	6.08%	8	$26.90	6.26%
VA	Greene	1	$4.10	$20.40	20.10%	1	$3.90	19.60%
VA	Hampton/Newport News+	8	$34.20	$1,049.80	3.26%	8	$31.20	3.08%
VA	Hanover+	6	$25.40	$424.30	5.99%	6	$23.09	5.65%
VA	Henrico+	30	$129.20	$1,736.30	7.44%	30	$126.50	7.70%
VA	Isle of Wight	2	$10.10	$82.30	12.27%	2	$9.90	11.69%
VA	James City+	6	$29.80	$381.20	7.82%	6	$25.60	6.93%
VA	King George	1	$4.50	$84.20	5.34%	1	$4.40	5.29%
VA	Lancaster	1	$3.60	$79.80	4.51%	1	$3.50	4.53%
VA	Loudoun+	12	$51.30	$1,379.20	3.72%	10	$40.56	3.10%
VA	Louisa	1	$4.60	$44.20	10.41%	1	$4.50	9.87%
VA	Norfolk City+	7	$41.10	$718.40	5.72%	7	$42.30	5.88%
VA	Orange	2	$11.20	$109.20	10.26%	2	$10.90	10.32%
VA	Page	1	$4.50	$64.80	6.94%	1	$4.40	7.06%
VA	Portsmouth City	3	$14.20	$279.10	5.09%	3	$13.90	5.13%
VA	Powhatan	1	$4.30	$67.90	6.33%	1	$4.20	6.43%
VA	Prince George	1	$4.20	$76.90	5.46%	1	$4.10	5.41%
VA	Prince William+	18	$81.60	$1,688.30	4.83%	18	$79.40	4.70%
VA	Shenandoah	1	$3.60	$108.80	3.31%	1	$3.90	3.80%
VA	Spotsylvania+	15	$74.90	$693.80	10.80%	15	$75.10	11.01%
VA	Stafford+	4	$17.90	$366.20	4.89%	4	$17.50	5.07%
VA	Suffolk City	1	$4.60	$277.80	1.66%	1	$4.40	1.68%
VA	Virginia Beach+	13	$53.90	$1,498.70	3.60%	13	$48.10	3.24%
VA	Warren+	2	$7.10	$140.20	5.06%	2	$6.70	4.97%
VA	York	1	$4.30	$163.70	2.63%	1	$4.10	2.53%
VA Recap: 269 stores with sales of $1.22 billion. Total retail food sales for VA in the study: $21.56 billion. CVS share of VA is 5.65%								

Mid-Atlantic Recap: 639 stores with sales of $3.36 billion annually. Mid-Atlantic retail food sales total: $50.04 billion.

CVS Per Store Average: $5.25 million

+Indicates in-Target pharmacies.

Source: *Food World*, June 2020

TAKING STOCK

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retail in 2020 and we continue to monitor, evaluate and adjust our plans to address the impact to our business. There are still many unknown factors related to the long-time impact of COVID-19 that could influence our financial results for the remainder of 2020."...on June 13, Albertsons ended its $2 per hour "appreciation pay" to its store associates, making the chain one of the last retailers to end its bonus compensation programs (Stop & Shop and Target have extended until July 4). As at Kroger and several other chains that have already terminated their bonus payments, all store associates will receive a one-time final bonus. In other Albertsons news, one of its principal investors, real estate firm Kimco Realty, has reduced its investment in the Boise, ID-based chain. That news is related to PE firm Apollo Global Management, which acquired a 17.5 percent stake in the big chain for $1.75 billion as it attempts to launch an IPO, likely in the next six weeks. Along with current largest shareholder Cerberus Capital Management, and Schottenstein Stores and Klaff Realty, Kimco has owned a stake in Albertsons since 2006. With the equity sale, Kimco received $156.1 million and saw its stake in the second largest pure-play retailer in the country decrease from 9.29 percent to 7.5 percent...kudos to Steve Smith, CEO of K-VA-T, who has renamed the Food City 500 - the NASCAR race sponsored by his company. The race will now be known as the Supermarket Heroes 500. In announcing the move in mid-May, the second-generation chief executive said: "For the last 76 days, our country has been in really uncharted territory with this COVID-19 pandemic. Like our counterparts throughout this great nation, our dedicated team of associates have gone above and beyond the call of duty to meet the needs of our customers and the communities we serve. We're proud to have this opportunity to honor supermarket heroes around the country for their hard work and dedication." Classy move by a classy guy...just heard that Necco Wafers will soon be returning to store shelves after a two-year absence thanks to its current owner, Spangler Candy. But the real news story is "why?" Necco Wafers taste like chalk, its flavor varieties barely resemble what they claim, and most importantly, Necco Wafers are not candy. Nasty stuff that I wouldn't feed to my dog. And I don't even like my dog that much. ...it's been a crazy month here at Best-Met Publishing so there are a few noteworthy obituaries held over from last month, beginning with rock & roll pioneer Little Richard. The powerhouse piano player with a screaming wail who burst upon the scene in 1955 has died at the age of 87. Along with Chuck Berry and Fats Domino, Richard Penniman brought what was once called "race music" into the mainstream, with such hits as "Good Golly, Miss Molly," "Long Tall Sally," "Tutti Fruitti" and "Lucille." Little Richard was a dynamic performer who influenced virtually every great band, including The Beatles, The Rolling Stones and Bruce Springsteen and the E Street Band. Little Richard was inducted into the inaugural class of the Rock & Roll Hall of Fame in 1987. "It is with a heavy heart that I ask for prayers for the family of my lifelong friend and fellow rocker Little Richard. He will live on always in my heart with his amazing talent and friendship. He was one of a kind and I will miss him dearly," said Jerry Lee Lewis, whose piano style was often compared to Little Richard's...co-

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RISK MANAGEMENT

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ing where to shop. If approached properly, trust can be gained by providing an interactive and ongoing communication strategy in which both workers and customers are active participants. Above all, risk communications should demonstrate a clear commitment from management to prioritization of health and safety. Examples of risk communications for grocers include:

- A risk communication approach that incorporates signage and illustrations within the store about the current risk management strategy;
- Grocers leveraging social media to communicate with their customer base by detailing the unique risk management approaches they are implementing;
- Communications that are not simply a rebranding of governmental guidelines, but detail the unique strategies being implemented for those operations.

Such approaches help instill confidence that the grocer is going above and beyond what is required to protect workers and customers. It also addresses the concern regarding the varying levels of risk perception from person to person. While adequate risk communication helps demonstrate that the grocer is taking the current situation seriously, it also allows the store to remain open and operate efficiently for people who do not perceive the risk of COVID-19 to be high. Therefore, the understanding and incorporation of risk perception and risk communication are vital components of a risk management strategy.

At the time of writing this article, the U.S. is still in the middle of the COVID-19 pandemic, even as our economy begins to reopen. The very idea of 'return to normal' has been questioned, given the changes in personal habits and business operations that are likely to remain long after the pandemic has subsided. The health and safety policies implemented by grocers will be added to the list of customer considerations when choosing where and how to shop. To ensure the health and safety of both workers and customers, grocers should develop risk management plans for COVID-19 that are based on informed guidance and are customized to the unique operations of a given store. Importantly, control strategies should be transparent and emphasized by management in order to respond to individuals' perceptions regarding risk.

Dr. G. Scott Dotson is a senior managing health scientist with Cardno ChemRisk with over 15 years of experience in areas of toxicology, industrial hygiene, risk assessment, and occupational health. Prior to joining Cardno ChemRisk, he was employed by the Centers for Disease Control and Prevention, National Institute for Occupational Safety and Health (NIOSH) as a health scientist for over 10 years.

Mr. Jason Lotter's, MS, CIH principal areas of training and expertise include industrial hygiene, exposure and risk assessment, and occupational safety. He has been involved in researching, measuring, and reconstructing exposures, and assessing risks to consumers and workers from a variety of chemicals.

Dr. Corey Boles completed his Ph.D. in Occupational and Environmental Health with an emphasis on Industrial Hygiene from The University of Iowa College of Public Health. Dr. Boles's research focused on developing, evaluating and implementing exposure assessment techniques for occupational and environmental exposure to bioaerosols. Dr. Boles also optimized sampling methodologies for the collection of human norovirus, general bacteria, and influenza A.

Cardno ChemRisk is a globally renowned scientific consulting firm with expertise in evaluating and understanding human health risks, technical capabilities, industry leadership, and a pioneering spirit that is based in San Francisco, CA. It specializes in helping clients characterize occupational, environmental and community health risks associated with complex exposures involving chemicals, pharmaceutical agents, or radionuclides in the environment, the workplace and in consumer goods. For more information about the company, contact Luda Kopelovich, MPH, luda.kopelovich@cardno.com, 415.618.3467.

Richmond Supermarket Leaders:

Kroger Share Slips Slightly As Publix, Whole Foods Open Stores; Food Lion Remains Solid Second

- Kroger Leads, But Sales Flat
- Food Lion Remains Solid #2
- Publix Sales Aided By 2 New Units
- New Whole Foods Finally Opens
- Wegmans #1 In Per-Store Sales

Rank	Company	2020 Stores	2020 Sales (in millions)	% of 2020 Market	2019 Stores	2019 Sales (in millions)	% of 2019 Market
1	Kroger (Marketplace)	18	$602.70	34.99%	18	$601.70	36.64%
2	Food Lion	48	$531.00	30.83%	48	$522.80	31.83%
3	Publix	13	$174.60	10.13%	11	$145.80	8.88%
4	Wegmans	2	$119.70	6.56%	2	$115.30	7.02%
5	Aldi	11	$72.40	4.20%	11	$70.50	4.29%
6	International Markets	6	$52.70	2.89%	6	$52.20	3.18%
7	Whole Foods	2	$41.80	2.42%	1	$20.40	1.24% r
8	Fresh Market	4	$39.70	2.30%	4	$39.80	2.42%
9	Lidl	6	$37.40	2.17%	6	$36.30	2.21%
10	Trader Joe's	1	$17.10	0.99%	1	$16.60	1.01%
		111	**$1,748.80**	**98.76%**	**108**	**$1,621.40**	**98.72%**

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

Total supermarket sales for the area are $1.72 billion.

Source: *Food World*, June 2020

Richmond Market Leaders:

Walmart Widens Gap Over Kroger In $3.7B Mkt. Where Alternates Control More Than Half The Biz

- Alternates Control 52.8%
- WM Extends Lead Over Kroger
- Drug Chains Improve To 12.2%
- RAD Closings Aid Walgreens
- Wawa Remains #1 C-Store

Rank	Company	2020 Stores	2020 Sales (in millions)	% of 2020 Market	2019 Stores	2019 Sales (in millions)	% of 2019 Market
1	Walmart (SC/Neighborhood Mkt)	18	$634.40	17.01%	19	$615.60	17.24%
2	Kroger	18	$602.70	16.16%	18	$601.70	16.85%
3	Food Lion	48	$531.00	14.24%	48	$522.80	14.64%
4	CVS+	60	$258.80	6.94%	60	$247.69	6.94%
5	Wawa	32	$239.75	6.43%	31	$203.28	5.69%
6	Walgreens	36	$196.70	5.27%	27	$147.60	4.13%
7	Publix	13	$174.60	4.68%	11	$145.80	4.08%
8	Target	12	$150.30	4.03%	12	$148.00	4.14%
9	7-Eleven	76	$142.90	3.83%	70	$126.20	3.53%
10	Wegmans	2	$119.70	3.21%	2	$115.30	3.23%
11	Sam's Club	3	$90.40	2.42%	3	$87.00	2.44%
12	Costco	2	$82.70	2.22%	2	$78.70	2.20%
13	Aldi	11	$72.40	1.94%	11	$70.50	1.97%
14	BJ's Wholesale Club	2	$68.80	1.84%	2	$65.40	1.83%
15	International Markets	6	$52.70	1.41%	6	$52.20	1.46%
16	Whole Foods	2	$41.80	1.12%	1	$20.40	0.57%
17	Fresh Market	4	$39.70	1.06%	4	$39.80	1.11%
18	Lidl	6	$37.40	1.00%	6	$36.30	1.02%
19	Sheetz	11	$37.20	1.00%	11	$37.20	1.04%
20	Fas-Marts	26	$35.70	0.96%	26	$36.00	1.01%
		388	**$3,609.55**	**97.02%**	**388**	**$3,443.57**	**96.43%**

Chart lists top 20 retailers in the Richmond market which sell groceries, HBC, drugs, GM and tobacco products. Volumes listed include 100% of store sales for supermarkets, c-stores and drug chains. Sales for club stores, Kmart, Target and Walmart are extrapolated to include comparable categories, as explained in the formula on page 85. Petroleum sales are not included. Counties/cities included are: Charles City, Chesterfield, Dinwiddie, Goochland, Hanover, Henrico, New Kent and Powhatan. ( ) Indicates another banner used by the company. **Total food sales for the area are: $3.73 billion.** Source: *Food World*, June 2020

Richmond-Norfolk Supermarket Leaders:

Food Lion Continues Supers Domination; Kroger, Harris Teeter, Aldi Gain Share With New Stores

- **Food Lion Dominates At 36.5%**
- **Kroger Gains With 3 New Units**
- **Publix Keeps Plugging, Adds 2**
- **Aldi Clearly Is Leading Discounter**
- **Wegmans' New Store Impresses**

Rank	Company	2020 Stores	2020 Sales (in millions)	% of 2020 Market	2019 Stores	2019 Sales (in millions)	% of 2019 Market
1	Food Lion	153	$1,742.50	36.49%	154	$1,727.96	38.17%
2	Kroger (Marketplace)	41	$1,227.40	25.70%	38	$1,151.90	25.45%
3	Harris Teeter	25	$540.90	11.33%	24	$518.00	11.44%
4	Wegmans	4	$247.40	5.18%	3	$177.70	3.93%
5	Publix	14	$187.60	3.92%	12	$158.90	3.51%
6	Aldi	28	$184.65	3.87%	25	$167.00	3.69%
7	Whole Foods	5	$135.60	2.84%	4	$115.20	2.54%
8	Lidl	16	$108.70	2.28%	15	$99.80	2.20%
9	Fresh Market	9	$101.20	2.12%	9	$104.80	2.32%
10	International Markets	9	$90.90	1.90%	9	$90.70	2.00%
		304	**$4,566.85**	**95.38%**	**293**	**$4,311.96**	**95.26%**

Chart ists the top 10 supermarket retailers in the Richmond-Norfolk market. Counties/cities included are: Albemarle, Caroline, Charles City, Chesapeake City, Chesterfield, Cumberland, Dinwiddie, Essex, Gloucester, Goochland, Greene, Hampton/ Newport News City, Hanover, Henrico, Isle of Wight, James City, King & Queen, Lancaster, Louisa, Mathews, Middlesex, New Kent, Norfolk City, Northumberland, Nottoway, Orange, Portsmouth City, Powhatan, Prince George, Richmond, Southampton, Suffolk City, Surry, Sussex, Virginia Beach City and York. Petroleum sales are not included. **Total supermarket sales for the area are $4.77 billion.** Source: *Food World*, June 2020

Richmond-Norfolk Market Leaders:

Walmart Pressing Food Lion For All Channel Volume Lead In $10.3 Billion Combo Marketing Area

- **Alts. Command 48.5% Share**
- **WM Pressing Food Lion For Lead**
- **C-Store King Is 7-Eleven: 381 Units**
- **WM, Target Control 19.5%**
- **Walgreens Adds 14 Stores**

Rank	Company	2020 Stores	2020 Sales (in millions)	% of 2020 Market	2019 Stores	2019 Sales (in millions)	% of 2019 Market
1	Food Lion	153	$1,742.50	16.85%	154	$1,727.96	17.31%
2	Walmart (SC/Neighborhood Mkt)	54	$1,725.00	16.68%	56	$1,681.00	16.84%
3	Kroger (Marketplace)	41	$1,227.40	11.87%	38	$1,151.90	11.54%
4	7-Eleven	381	$722.20	6.98%	377	$702.95	7.04%
5	CVS+	122	$546.80	5.29%	122	$520.99	5.22%
6	Harris Teeter	25	$540.90	5.23%	24	$518.00	5.19%
7	Walgreens	89	$458.70	4.34%	75	$368.50	3.69%
8	Wawa	64	$417.75	4.04%	62	$372.15	3.73%
9	Target	25	$295.90	2.86%	25	$291.70	2.92%
10	Wegmans	4	$247.40	2.39%	3	$177.70	1.78%
11	Sam's Club	8	$246.50	2.38%	8	$239.30	2.40%
12	Rite Aid	71	$225.30	2.18%	89	$290.00	2.90%
13	Military Commissaries	6	$223.66	2.16%	6	$234.84	2.35%
14	BJ's Wholesale Club	6	$191.40	1.85%	6	$183.80	1.84%
15	Costco	5	$190.90	1.85%	5	$182.10	1.82%
16	Aldi	28	$184.65	1.79%	25	$167.00	1.67%
17	Publix	14	$187.60	1.81%	12	$158.90	1.59%
18	Whole Foods	5	$135.60	1.31%	4	$115.20	1.15%
19	Lidl	16	$108.70	1.05%	15	$99.80	1.00%
20	Fresh Market	9	$101.20	0.98%	9	$104.80	1.05%
		1,128	**$9,720.06**	**93.99%**	**1,115**	**$9,288.59**	**93.04%**

Chart lists the top 20 retailers in the Richmond-Norfolk market which sell groceries, HBC, drugs, GM and tobacco products. Volumes listed include 100% of store sales for supermarkets, c-stores and drug chains. Sales for club stores, Kmart, Target and Walmart are extrapolated to include comparable categories, as explained in the formula on page 85. Petroleum sales are not included. Counties/cities included are: Albemarle, Caroline, Charles City, Chesapeake City, Chesterfield, Cumberland, Dinwiddie, Essex, Gloucester, Goochland, Greene, Hampton/ Newport News City, Hanover, Henrico, Isle of Wight, James City, King & Queen, Lancaster, Louisa, Mathews, Middlesex, New Kent, Norfolk City, Northumberland, Nottoway, Orange, Portsmouth City, Powhatan, Prince George, Richmond, Southampton, Suffolk City, Surry, Sussex, Virginia Beach City and York. **Total food sales for the area are: $10.34 billion.** Source: *Food World*, June 2020

GREAT BALLS OF FIRE

By Duke Winston

COVID-19 Impacts All Richmond-Norfolk Retailers; Wegmans' VA Beach Unit Is 'Store Of The Year'

Just when Big Duke thought the Richmond and Tidewater markets couldn't support any new store openings, a few retailers had other ideas. In Richmond, Publix continued its market expansion plan with three new ribbon cuttings and the long-awaited Whole Foods on Broad Street (C.F. Sauer property) finally debuted in January.

In Tidewater, Kroger opened three of the Farm Fresh stores it originally acquired in 2018 and sister firm Harris Teeter converted the last of the 10 stores it purchased from the now defunct former market leader in Tidewater. The market's largest extreme discounter - Aldi - also added three new units. However, the biggest splash was made by Wegmans when it opened its first mega-store in the region in Virginia Beach.

As with all markets in the region, the effects of COVID-19 played a major role in both marketing areas as most retailers (convenience stores less so) experienced record comp sales levels during March.

In Richmond, market leader Walmart slightly extended its margin over Kroger - the difference being stronger same store sales at the Bentonville, AR-based mass merchant. Third-ranked Food Lion, having made significant strides last year when it remodeled all of its Richmond stores, held serve this year and delivered solid comp store increases.

In Tidewater, the top two merchants - Food Lion and Walmart - both actually lost some ground this year as new store openings slightly impacted their sales. However, the "big two" still dominate the $5.4 billion region, with a combined market share of 33.94 percent. Of note in the market is the continued sales decline at Tidewater's five military commissaries, which have been trending negatively for 10 consecutive years. And of all the markets that this market study covers, alternate channel retailers (mass, drug, club and c-store) command the largest share in Tidewater, controlling 49.3 percent of market's food and drug business.

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

***Walmart** – Despite another stores closure (and no new stores), the "Behemoth" had a solid year with consistent comp sales gains both pre-COVID and during the month of March. Over the past three years, Walmart has improved store cleanliness, in-stock conditions and associate morale -which has paid off despite an almost complete stoppage to*

See **GREAT BALLS** on page 102

LAST MONTH, CUISINE SOLUTIONS DONATED AND SERVED 2,400 LUNCH MEALS TO FRONTLINE healthcare workers at Virginia Hospital Center (VHC) to show appreciation for the hard work and sacrifices they are making to serve the community during COVID-19. The event was a collaborative effort organized by Sterling, VA based sous vide food manufacturer and distributor Cuisine Solutions and World Central Kitchen.

PER STORE AVERAGES: 2020

Rank	Company	Stores	2020 Sales (in millions)	Per Store Avg. (in millions)
1	Wegmans	22	$1,753.70	$79.71
2	Costco*	30	$1,584.80	$52.83
3	The Giant Company (Martin's)	59	$2,397.41	$40.63
4	Whole Foods	30	$1,093.30	$36.44
5	Giant Food	158	$5,623.42	$35.59
6	Sam's Club*	26	$919.40	$35.36
7	BJ's Wholesale Club*	29	$935.00	$32.24
8	Walmart (SC/Neighborhood Mkt)*	161	$5,021.80	$31.19
9	Military Commissaries*	20	$607.04	$30.35
10	Kroger (Marketplace)*	41	$1,227.40	$29.94

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

* Sales are extrapolated to include food, GM, HBC, floral, tobacco and pharmacy as explained on page 85.

Source: *Food World,* June 2020

COVID-19 Creates Temporary Sales Boom For Retailers; Impact From Alternates Increasing

from page 1

that most retailers' annual revenue gain was between 4 and 5 percent (our survey breaks out each retailer's volume individually).

After our market study measuring period ended, most retailers continued to enjoy solid same store sales increases, but not nearly at the level of March's.

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

It was a strong year for perennial market leader (since 1978) Giant Food, even before the pandemic-related sales increases. Sales rose from $5.17 billion to $5.62 billion for its 158 stores in the market, two more than last year. It was the biggest jump the Landover, MD "brand" of Ahold Delhaize USA (ADUSA) has made in more than 20 years. Internally, Giant named veteran Ira Kress interim president after promoting Gordon Reid to head ADUSA's larger but struggling Stop & Shop unit last July. Last month, Kress was named president of the company. Giant also settled a new four-year labor contract with UFCW Locals 400 and 27 earlier this year.

Ranking second again this year was Walmart, a retailer whose same store sales, both for the year and during the month of March, were above the industry average. The Bentonville Behemoth actually closed two Neighborhood Markets in Virginia and didn't open any new stores as it continues to invest in its rapidly growing e-commerce business. Extrapolated food and drug sales in the region are estimated at $5.02 billion, up from $4.85 billion last year.

CVS, the largest drug chain in the Mid-Atlantic, retained its third-place ranking in the market, and like retailers in other trade channels, experienced solid same store sales gains. The Woonsocket, RI merchant operated nine more stores (639 vs. 630) and amassed estimated annual sales of $3.36 billion.

Food Lion has turned out to be ADUSA's "little engine that could." The smallest footprint in the retailer's catalogue has found success in deploying its "Easy, Fresh & Affordable" brand refreshment which includes many store remodels and improved merchandising. The Salisbury, NC-based chain operates 254 stores in the region whose estimated sales are $2.87 billion.

Moving up to fifth in this year's ranking is The Giant Company (formerly Giant/Martin's), another unit of ADUSA. Despite operating only about 35 percent of its stores in the *Food World* coverage area, the Carlisle, PA merchant managed to produce high per store volume averages while also adding five stores to its base including acquiring Central PA independent retailers Ferguson & Hassler and Musser's Markets. The perennial market leader in Central PA where it operates 50 stores, The Giant Company also runs 11 units in Maryland and Virginia under the Martin's banner. Sales for the 12 months ended March 31 were $2.40 billion, an increase of $222 million over last year.

Ranking sixth among all retailers in the Mid-Atlantic region is Safeway's Eastern division, under the leadership of veteran industry executive Tom Lofland. In his two years at the helm of the division of Albertsons, Lofland has stabilized business and improved the culture at the company's 110 stores. Sales at those units were $2.34 billion. Like Giant Food, Safeway recently signed a new 4-year agreement with UFCW Locals 400 and 27.

Moving up a notch into seventh place among all Mid-Atlantic retailers was Harris Teeter, which benefited from a new store in Alexandria, VA (its sixth) and the opening of a former Farm Fresh store in Tidewater. The unit of Kroger now operates 79 stores in the region which garnered an estimated $2.10 billion in annual sales.

The Goliath of all convenience store chains, 7-Eleven, continued to pace the pack in the 89-county market. Operating an impressive 1,118 c-stores, the Irving, TX-based operator amassed estimated annual sales of $2.02 billion for the year while also accelerating its remodeling pace both at corporate and franchised locations.

The highest per-store average supermarket retailer in the region – Wegmans – had a strong same store sales year while opening one new store in the region (Virginia Beach). The privately-held Rochester, NY-based company also opened its first North Carolina store during the past 12 months (in Raleigh; the first of six planned for the Research Triangle). Sales at its 22 stores in the market were an estimated $1.75 billion. Over the next three years, Wegmans has new Mid-Atlantic stores slated for: Rockville, MD; Alexandria, VA; Arcola, VA, Reston, VA; Tysons Corner, VA; and Washington, DC. With many of

See **MARKET STUDY** on page 97

MARKET STUDY

from page 96

its service departments closed because of COVID-19 health concerns, it will be interesting to see how the company reinvents its self-service prepared foods areas as the pandemic evolves.

Maintaining its hold on the 10th position in the region are the quickly expanding "International Markets" (specialty and ethnic supermarkets that are at least 20,000 square feet in size are grouped together in this survey). As the area's Latino and Asian population grows, we estimate that there are now 131 ethnic markets in region, seven more than last year. Collectively, those stores rang up approximately $1.75 billion in sales, a revenue gain of $120 million over 2019. As a comparison, five years ago there were an estimated 104 "Internationals Markets" in the Mid-Atlantic that compiled estimated annual sales of $1.28 billion.

Other retailers that topped the $1 billion mark in annual sales in the 89-county region included Walgreens - 328 stores and $1.68 billion in estimated annual sales. The Deerfield, IL-based pharmacy store chain added nearly 100 former Mid-Atlantic Rite Aid stores over the past year as part of a 2018 transaction that involved approximately 2,000 Rite Aid stores nationally. Also: Target - 109 stores, estimated extrapolated annual volume of $1.60 billion; Costco - 30 stores, estimated extrapolated annual sales of $1.58 billion; Weis Markets with 99 stores and annual revenue of $1.584.2 billion; Kroger, which operated 41 stores in the region - it added three former Farm Fresh stores in Tidewater to its fold this year - and garnered estimated annual sales of $1.15 billion; Whole Foods, whose 31 natural and organic stores (two more than last year), amassed an estimated annual revenue of $1.11 billion; and regional convenience store power, Wawa, whose 164 c-stores rang up annual sales of $1.06 billion.

By class of trade, the leaders are: supermarkets - Giant/Landover (158 stores, $5.62 billion in sales); clubs - Costco (30 stores, $1.58 billion in extrapolated sales); mass - Walmart (161 stores, $5.02 billion in extrapolated sales); drug - CVS (639 stores and $3.36 billion in estimated sales); and convenience stores - 7-Eleven (1,118 stores and an estimated $2.02 billion in revenue). Additionally, the 20 military commissaries rang up annual sales of $607.0 million (vs. $644.1 last year), continuing a decline of military commissary sales that has occurred over the past decade.

Viewed as a group, the 51 corporate chains in the market operated 5,075 stores and accrued $48.68 billion in annual sales, good for 97.3 percent of the Mid-Atlantic region's $50 billion food and drug market.

Among all independent retailers (those operating between two and 18 stores), Baltimore-based B. Green led the pack with 11 stores (including adding the former Lauer's store in Pasadena, MD to its fold) which amassed sales of $190.3 million.

Karns Prime & Fancy Foods, which acquired the former Darrenkamp's unit in Etters PA, ranked second among all independent retailers in the region. The family-owned independent, based in Mechanicsburg, PA, now operates nine stores, which did $154 million in sales last year.

Another Central PA based group, Family Owned Markets (FOM), which used to be part of the independent group of retailers supplied from C&S Wholesaler's Grocers Robesonia, PA warehouse, left C&S earlier this year and is now supplied by Hickory, NC-based MDI. FOM's eight retail members compiled an aggregate volume of $131.1 million over the past 12 months.

Other perennial Mid-Atlantic independents on the leaderboard included Graul's, Kennie's, McKay's (which added two former Shoppers stores that did not open by our March 31 qualifying period); Eddie's of Roland Park; and Geresbeck's (which acquired and opened the former Lauer's supermarket in Riviera Beach, MD).

As a collective group, the 14 multi-store independent retail organizations in the Mid-Atlantic operated 69 supermarkets which garnered estimated annual sales of $942.4 million. Collectively, those stores controlled 1.88 percent of the region's food and drug revenue.

There is only one story that dominated industry news of the past year - COVID-19 and how the world is reacting to it. Undoubtedly, the pandemic will be the major news story going forward, too.

However, there were some industry changes to recap as well. Shoppers Food, which had been on the sales block for the past 18 months, is temporarily not for sale as corporate parent UNFI said it will wait until the current health crisis improves to continue seeking a buyer for the remaining units. Before it made that announcement last month, UNFI had closed or sold 20 Shoppers over the past 12 months, and its decision to remain open is likely a short-term move as UNFI seeks to find other buyers for its remaining Baltimore-Washington stores.

See **MARKET STUDY** on page 102

NEW SUPERMARKET, CLUB STORE & SUPERCENTER OPENINGS
in the Food World Market

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

Aldi	7	Washington, DC (Fort Totten); Montgomery Village, MD; Severn, MD; Silver Spring, MD; Mechanicsburg, PA*; Alexandria, VA; Leesburg, VA
Amazon Grocery Store	4	Washington, DC (2) (Friendship Heights, H St.); Fairfax, VA; Franconia, VA
Compare Foods	5	Baltimore, MD (2) (The Alameda, Anchor Square); Capitol Heights, MD; Colmar Manor, MD; Landover, MD
Giant Food	4	Bethesda, MD; Fort Washington, MD (r); Fairfax, VA; Springfield, VA (r)
Harris Teeter	4	Washington, DC (Howard Univ.); Kent Island, MD; Arlington, VA (2) (King and Beauregard Sts.) (North Glebe Rd.-r)
Lidl	20	Washington, DC (Naylor Rd. & Alabama Ave.); Bear, DE; Annapolis, MD; Baltimore, MD (Northwood Commons); Brooklyn Park, MD; Columbia, MD; Montgomery Village, MD; Oxon Hill, MD; Reisterstown, MD; Takoma Park, MD; Timonium, MD; Waldorf, MD; Wheaton, MD; Alexandria, VA; Burke, VA; Chantilly, VA; Fairfax, VA; Fredericksburg, VA; Manassas, VA; Sterling, VA
McKay's	2	California, MD; Waldorf, MD*
Publix	4	Midlothian, VA*; N. Chesterfield, VA; Richmond, VA (Ellwood Ave.); Stafford, VA
Redner's Markets	1	Lewes, DE
Safeway	1	Washington, DC (r) (14th & D Sts. SE)
Sprouts	2	Baltimore, MD (Boston St.); Pasadena, MD*
Target	2	Wilmington, DE; Ballston, VA
Trader Joe's	2	Newark, DE; Bethesda, MD (Wisconsin Ave.)
Wegmans	7	Washington, DC (Wisconsin Ave. & Rodman St.); Greenville, DE; Rockville, MD; Alexandria, VA (Eisenhower Hwy.); Arcola, VA; Reston, VA; Tysons Corner, VA
Weis Markets	2	Gap, PA (r); Martinsburg, WV
Whole Foods	5	Washington, DC (2) (Florida Ave., Glover Park-x); Baltimore,MD (r) (Harbor East); Towson, MD; Falls Church, VA (E. Broad & N. Washington)

*These stores opened during the period April 1, 2020 through June 19, 2020; data not reflected in this study.

(r) = replacement stores

x-Reopening after being closed more than 3 years.

Source: *Food World*, June 2020

TAKING STOCK

from page 91

median Jerry Stiller, 92, has also died. Stiller, father of actor and director Ben Stiller, began his career as part of a comedy duo with his wife Anne Meara (who died in 2015). They had a successful career as comedians appearing on many variety shows and in nightclubs. Nearly 20 years after the act broke up, Stiller found a new generation of fans as Frank Costanza, the hot-headed father of George (Jason Alexander) in the iconic TV series "Seinfeld." Less than a year after that sitcom ended, Stiller reappeared in "The King of Queens" in essentially the same role, this time as the short-tempered father of the lead character played by Leah Remini...Fred Willard, whose understated style of comedy was at the other end of the spectrum from Jerry Stiller, has also left us at the age of 86. In a career that spanned 51 years and included a whopping 313 film and TV credits, Willard was a master of the nuanced. In my opeinion, his best works were his roles in the Rob Reiner ("This Is Spinal Tap") and Christopher Guest "mockumentary" movies. In Guest's "Best In Show" (2000), while playing dog show announcer Buck Laughlin, he wondered, "Why breeders didn't want miniature schnauzers to be larger?" and commented when the terriers made their entrance, "To think that in some countries these dogs are eaten."...Eddie Haskell is dead. I'm referring to Ken Osmond, 76, the actor who played the manipulative teenager in the unforgettable sitcom "Leave It To Beaver" (1957-1963). Eddie had only one "go-to schtick," patronizing the parents of Theodore "Beaver" Cleaver (Jerry Mathers) and his older brother Wally (Tony Dow), June and Ward Cleaver (Barbara Billingsley and Hugh Beaumont), while mocking them behind their backs. "Oh, good afternoon Mrs. Cleaver. I was just telling Wallace how pleasant it would be for Theodore to accompany us to the movies," was a typical Haskell greeting. After the series ended, Osmond found acting work hard to come by, so he joined the Los Angeles Police Department. In 1980, while on duty, he was shot three times during a chase but escaped serious injury. He retired from the force in 1988. The character of Eddie Haskell lives on in popular culture as a real medical issue - "the Eddie Haskell effect." As explained in Psychology Today in 2011, the syndrome is related to why workplace bullies may not be discovered because they suck up to the authorities while bullying subordinates and peer behind their backs. Who knew?...and one of the greatest (and most unsung) basketball players to ever represent Baltimore and Washington has passed on. I said Baltimore and Washington because Wes Unseld played for both the Baltimore Bullets and Washington Wizards during a 13-year NBA career, which ultimately led to a berth in the Basketball Hall of Fame. At 6' 7" and 245 pounds, Unseld was like an early-version of Charles Barkley, but without Barkley's offensive game. Height challenged, the Louisville native faced some of the league's greatest centers of all time - Wilt Chamberlain, Nate Thurmond and Kareem Abdul-Jabbar – and with his brute strength, savvy and basketball intelligence, he often neutralized those stars who almost always had more raw talent than Unseld. "You always wanted to make sure you got a good night's sleep before you played against him," said another Hall of Famer, former New York Knicks center Willis Reed, another Hall of Famer who squared off against Unseld more than 75 times (including some classics playoff duels). "He was most consciously a rebounder - he could shoot, but he didn't emphasize that part of his game - and felt that if he did his job right, by getting the defensive rebound and making the quick outlet pass, they would score quickly." A great team player, Wes Unseld was also extremely generous, contributing to many charitable and philanthropic causes, some of which involved the grocery business, where I found him to be accessible and humble. Sad to see him pass at only 74...and finally, as we publish our signature issue of the year. I want to remind my many industry friends to be careful and cautious. COVID-19 remains a huge existential threat. Beyond the impact that it's already had on our lives, there are certain to be more challenges for most of us. Do the right thing; please stay safe... as we were going to press, I was saddened to hear of the recent passing of Ivan Goldstein, 73, founder of Baltimore-based Purity Products. Ivan grew up in the Pittsburgh area and began Purity, which distributed such well-known brands as Tropicana juices and Daily's drinks and mixes, in the mid-1970s. He was a larger than life personality, with opinions about a lot of things, who also loved old cars and his "hobby" of being an emergency medical technician. To spend an hour with Ivan Goldstein was engaging, entertaining and educational. I'll miss his passion and humor.

Tidewater Supermarket Leaders:

With 3 New Stores, Kroger Making Slight Inroads Against Food Lion; Aldi Gains, Wegmans Debuts

- Food Lion Remains Dominant
- 3 New Units Take Kroger To #2
- Sister Firm HT Adds New Store
- Aldi Gains With 3 More Units
- Wegmans' Va. Bch. Unit Wows

Rank	Company	2020 Stores	2020 Sales (in millions)	% of 2020 Market	2019 Stores	2019 Sales (in millions)	% of 2019 Market
1	Food Lion	81	$966.00	39.92%	82	$963.66	42.29%
2	Kroger (Marketplace)	20	$503.40	20.81%	17	$430.80	18.91%
3	Harris Teeter	22	$475.70	19.66%	21	$453.30	19.89%
4	Aldi	17	$112.25	4.64%	14	$96.50	4.24%
5	Lidl	10	$71.40	2.95%	9	$63.50	2.79%
6	Wegmans	1	$63.50	2.62%	0	$0.00	0.00%
7	Fresh Market	5	$61.50	2.54%	5	$65.00	2.85%
8	Whole Foods	2	$60.60	2.50%	2	$62.50	2.74%
9	Trader Joe's	3	$47.70	1.97%	3	$46.60	2.05%
10	International Markets	3	$38.20	1.58%	3	$38.50	1.69%
		164	**$2,400.15**	**99.19%**	**156**	**$2,220.36**	**97.44%**

The chart above lists the top 10 supermarket retailers in the Tidewater market. Counties/cities included are: Chesapeake City, Gloucester, Hampton/Newport News City, Isle of Wight, James City, Norfolk City, Portsmouth City, Suffolk City, Virginia Beach City and York. Petroleum sales are not included. **Total supermarket sales for the area are $ 2.42 billion.** Source: *Food World*, June 2020

Tidewater Market Leaders:

Leaders Food Lion, Walmart Control 33.95% Of Hampton Roads Mkt.; Commissaries Drop Again

- Alts. Share Dips To 49.3%
- #2 WM Shuts Neighborhood Mkt.
- CVS Still Ahead Of Walgreens
- 7-Eleven Dominates C-Stores
- Commissary Volume Drops Again

Rank	Company	2020 Stores	2020 Sales (in millions)	% of 2020 Market	2019 Stores	2019 Sales (in millions)	% of 2019 Market
1	Food Lion	81	$966.00	17.94%	82	$963.66	18.48%
2	Walmart (SC/Neighborhood Mkt)	29	$862.10	16.01%	30	$844.00	16.18%
3	7-Eleven	280	$529.10	9.83%	281	$524.95	10.06%
4	Kroger (Marketplace)	20	$503.40	9.35%	17	$430.80	8.26%
5	Harris Teeter	22	$475.70	8.83%	21	$453.30	8.69%
6	CVS+	47	$228.00	4.23%	47	$214.50	4.11%
7	Walgreens	44	$210.50	3.91%	43	$197.50	3.79%
8	Military Commissaries	5	$194.18	3.61%	5	$204.11	3.91%
9	Rite Aid	58	$184.10	3.42%	62	$200.10	3.84%
10	Wawa	32	$178.00	3.31%	31	$168.87	3.24%
11	Sam's Club	4	$133.30	2.48%	4	$129.90	2.49%
12	Target	12	$133.10	2.47%	12	$131.60	2.52%
13	BJ's Wholesale Club	4	$122.60	2.28%	4	$118.40	2.27%
14	Aldi	17	$112.25	2.08%	14	$96.50	1.85%
15	Costco	2	$73.50	1.37%	2	$70.40	1.35%
16	Lidl	10	$71.40	1.33%	9	$63.50	1.22%
17	Wegmans	1	$63.50	1.18%	0	$0.00	0.00%
18	Fresh Market	5	$61.50	1.14%	5	$65.00	1.25%
19	Whole Foods	2	$60.60	1.13%	2	$62.50	1.20%
20	Trader Joe's	3	$47.70	0.89%	3	$46.60	0.89%
		678	**$5,210.43**	**96.77%**	**674**	**$4,986.19**	**95.60%**

Chart lists top 20 retailers in the Tidewater market which sell groceries, HBC, drugs, GM and tobacco products. Volumes listed include 100% of store sales for supermarkets, c-stores and drug chains. Sales for club stores, Kmart, Target and Walmart are extrapolated to include comparable categories, as explained in the formula on page 85. Petroleum sales are not included. Counties/cities included are: Chesapeake City, Gloucester, Hampton/Newport News City, Isle of Wight, James City, Norfolk, Portsmouth City, Suffolk City, Virginia Beach City and York. **Total food sales for the area are: $5.38 billion.** Source: *Food World*, June 2020

IN REVIEW: WALGREENS

State	County	2020 Stores	2020 Sales (in millions)	2020 County Food Sales	% of 2020 County Market	2019 Stores	2019 Sales (in millions)	% of 2019 County Market
DC	Washington	10	$58.20	$2,196.50	2.65%	6	$32.10	1.57%
DC Recap: 10 stores with sales of $58.2 million. Total retail food sales for DC in the study: $2.12 billion. Walgreens share of DC is 2.65%.								
DE	Kent	8	$33.40	$466.70	7.16%	8	$31.20	6.74%
DE	Sussex	14	$71.00	$864.80	8.21%	14	$69.60	8.46%
DE Recap: 22 stores with sales of $104.4 million. Total retail food sales for DE in the study: $1.33 billion. Walgreens share of DE is 7.84%.								
MD	Anne Arundel	16	$57.40	$2,039.70	2.81%	6	$21.80	1.05%
MD	Baltimore City	20	$127.40	$1,368.20	9.31%	11	$63.80	4.67%
MD	Baltimore County	26	$142.70	$2,929.60	4.87%	17	$98.70	3.47%
MD	Calvert	2	$10.70	$349.70	3.06%	1	$5.30	1.58%
MD	Caroline	1	$5.30	$76.20	6.96%	1	$5.10	7.21%
MD	Carroll	4	$18.20	$595.40	3.06%	2	$9.70	1.66%
MD	Cecil	3	$12.30	$251.60	4.89%	3	$12.20	5.03%
MD	Charles	3	$14.60	$449.80	3.25%	3	$14.40	3.11%
MD	Dorchester	1	$4.90	$59.30	8.26%	1	$4.80	8.26%
MD	Frederick	5	$23.70	$827.60	2.86%	1	$5.30	0.67%
MD	Harford	11	$51.70	$929.60	5.56%	6	$33.80	3.85%
MD	Howard	5	$25.10	$1,090.20	2.30%	3	$16.40	1.58%
MD	Kent	2	$19.90	$95.80	20.77%	2	$18.50	20.81%
MD	Montgomery	11	$59.60	$3,412.40	1.75%	6	$33.70	1.04%
MD	Prince George's	12	$63.40	$2,836.10	2.24%	5	$28.10	0.98%
MD	Queen Anne's	2	$11.40	$130.60	8.73%	2	$11.20	8.59%
MD	St. Mary's	3	$13.80	$352.60	3.91%	0	$0.00	0.00%
MD	Talbot	1	$4.60	$196.20	2.34%	1	$4.50	2.34%
MD	Washington	4	$19.30	$461.20	4.18%	2	$10.70	2.37%
MD	Wicomico	2	$9.50	$263.40	3.61%	2	$9.40	3.63%
MD	Worcester	1	$5.80	$209.70	2.77%	1	$5.60	2.73%
MD Recap: 135 stores with sales of $701.3 million. Total retail food sales for MD in the study: $18.96 billion. Walgreens share of MD is 3.7%.								
PA	Franklin	1	$5.20	$413.50	1.26%	1	$5.00	1.26%
PA	Lancaster	1	$5.10	$1,556.20	0.33%	1	$4.90	0.33%
PA	York	3	$15.60	$1,420.80	1.10%	3	$15.30	1.12%
PA Recap: 5 stores with sales of $25.9 million. Total retail food sales for PA in the study: $4.99 billion. Walgreens share of PA is 0.43%.								
VA	Accomack	1	$5.00	$85.90	5.82%	1	$4.80	5.73%
VA	Albemarle	2	$9.40	$579.70	1.62%	1	$4.80	0.85%
VA	Arlington	6	$33.70	$845.70	3.98%	2	$12.10	1.53%
VA	Caroline	1	$4.40	$29.90	14.72%	0	$0.00	0.00%
VA	Chesapeake City	6	$24.50	$820.40	2.99%	6	$23.80	3.21%
VA	Chesterfield	8	$44.40	$1,299.90	3.42%	8	$42.60	3.39%
VA	Culpeper	1	$5.70	$140.50	4.06%	1	$5.50	3.88%
VA	Dinwiddie	2	$10.10	$123.20	8.20%	2	$9.90	8.11%
VA	Essex	1	$4.80	$57.50	8.35%	0	$0.00	0.00%
VA	Fairfax	24	$127.80	$4,850.20	2.63%	14	$78.80	1.69%
VA	Fauquier	2	$10.10	$166.30	6.07%	1	$5.40	3.47%
VA	Frederick	3	$15.50	$457.30	3.39%	3	$15.10	3.51%
VA	Gloucester	1	$5.00	$112.90	4.43%	1	$4.90	4.42%
VA	Hampton/Newport News	9	$45.20	$1,049.80	4.31%	9	$41.30	4.08%
VA	Hanover	3	$15.30	$424.30	3.61%	2	$10.70	2.62%
VA	Henrico	21	$117.20	$1,736.30	6.75%	15	$84.40	5.14%
VA	James City	1	$6.20	$381.20	1.63%	1	$5.90	1.60%

IN REVIEW: WALGREENS

State	County	2020 Stores	2020 Sales (in millions)	2020 County Food Sales	% of 2020 County Market	2019 Stores	2019 Sales (in millions)	% of 2019 County Market
VA	Lancaster	1	$5.30	$79.80	6.64%	1	$5.10	6.61%
VA	Loudoun	10	$48.30	$1,379.20	3.50%	7	$32.80	2.51%
VA	Louisa	1	$4.90	$44.20	11.09%	1	$4.70	10.31%
VA	New Kent	2	$9.70	$47.30	20.51%	0	$0.00	0.00%
VA	Norfolk City	6	$33.80	$718.40	4.70%	5	$28.10	3.91%
VA	Northampton	1	$4.20	$33.80	12.43%	0	$0.00	0.00%
VA	Northumberland	1	$4.30	$18.80	22.87%	0	$0.00	0.00%
VA	Portsmouth City	2	$11.00	$279.10	3.94%	2	$10.80	3.98%
VA	Prince George	1	$4.40	$76.90	5.72%	1	$4.30	5.67%
VA	Prince William	10	$55.60	$1,688.30	3.29%	9	$48.90	2.90%
VA	Richmond	1	$4.10	$20.30	20.20%	0	$0.00	0.00%
VA	Shenandoah	2	$8.40	$108.80	7.72%	0	$0.00	0.00%
VA	Southampton	1	$4.60	$83.60	5.50%	1	$4.50	5.53%
VA	Spotsylvania	4	$18.40	$693.80	2.65%	3	$13.70	2.01%
VA	Suffolk City	3	$13.20	$277.80	4.75%	3	$12.90	4.94%
VA	Virginia Beach	14	$61.30	$1,498.70	4.09%	14	$59.80	4.03%
VA	Westmoreland	2	$8.40	$45.10	18.63%	0	$0.00	0.00%
VA	York	2	$10.30	$163.70	6.29%	2	$10.00	6.18%

VA Recap: 156 stores with sales of $794.5 million. Total retail food sales for VA in the study: $21.56 billion. Walgreens share of VA is 3.68%.

Mid-Atlantic Recap: 328 stores with sales of $1.68 billion annually. Mid-Atlantic retail food sales total: $50.04 billion.
Walgreens Per Store Average: $5.14 million

Source: *Food World*, June 2020

MARKET STUDY

from page 97

The two fastest growing retailers in the region are discounters Aldi and Lidl, which have fared very well during the pandemic. Both German-owned chains have proved that offering a core group of popular items at the right price strongly appealed to shoppers during the health crisis. Of course, Aldi had been among the most successful retailers in the region (and country) over the past five years and it plans to continue its Mid-Atlantic growth with four new stores and more than two dozen remodels/expansions over the next 24 months.

Lidl is expanding even more rapidly in the *Food World* marketplace. Fifteen new stores are planned in the near-term including six units it acquired from Shoppers earlier this year.

Other retailers that are expanding their base thanks to purchasing Shoppers stores include Compare Foods, an ethnic and specialty retailer which operates stores in Metro New York and North Carolina and acquired five former Shoppers stores, none of which have yet opened. Moreover, McKay's Food & Drug, the longstanding Southern Maryland family-owned independent, acquired Shoppers units in California, MD and Waldorf, MD, the latter store opening late last month.

Two retailers in the region exited private equity control and became public-traded companies during the past 12 months: Grocery Outlet rang the Wall Street bell last June 20 and named Eric Lindberg as its new CEO. The Emeryville, CA-based close-out and overstock specialist, which operates 12 units in Pennsylvania (most of its stores are on the West Coast), has vowed to expand its presence in the Mid-Atlantic. Additionally, BJ's Wholesale Club left the ownership umbrella of Leonard Green and CVC and went the successful IPO route last June 28. Late last year, the Westborough, MA club operator named Lee Delaney chief executive and elevated previous CEO Chris Baldwin to executive chairman.

Greensboro, NC-based The Fresh Market also made a leadership change earlier this year, naming former Sobey's executive Jason Potter as its CEO, replacing Larry Appel.

Retailers that have departed over the past 12 months include Lauer's Supermarkets (which sold its two stores) and Earth Fare, which liquidated its operations and sold many of its stores earlier this year.

AISLE chatter

from page 4

out their market areas. Additionally, $1 million will go into a reserve fund for social justice and diversity initiatives in the future, including community outreach, supplier diversity and ongoing education.

"Racial justice and equality cannot be achieved by people returning to the status quo. We must intentionally open a door to lasting change across our country," said president and CEO **Vivek Sankaran**. "We've seen unity in the seas of people throughout the country demanding justice for those whose lives were senselessly taken and calling for an end to hatred, intolerance and systemic racism. We will be part of the solution by helping our communities lay the foundation for racial equality and social justice."

June 19, referred to as Juneteenth, is a very important day in African American history as it is the oldest nationally celebrated commemoration of the ending of slavery in the United States. Although not yet recognized as a national holiday, Target has decided to make it an official annual company one. "We recognize that the racial trauma the country is experiencing now is not new, but throughout recent weeks there has been a sense that this time is, and has to be, different," says Brian Cornell, chairman and CEO, Target. "Juneteenth takes on additional significance in this moment. Moving now to recognize it on an annual basis—as a day to celebrate, further educate ourselves or connect with our communities—is one more important action Target can take as a company to help the country live up to the ideal of moving forward in a new way." While all stores and distribution centers will remain open, hourly team members who work on June 19 will be paid time and a half and all eligible Target team members have the option to take the day off with full pay. Additionally, headquarters offices will be closed in observance. "This is just one step. In the coming weeks and months, we'll continue to listen and learn from our team members, our guests and our community partners—all to further Target's role in creating tangible and lasting change."

Because many companies are afraid of creating conflict, often times they remain silent and immobile in times like these. Therefore, I must applaud these industry organizations and others that are taking action – it certainly takes a lot of courage and strength to do so. In leading the charge, hopefully others will follow their example to make drastic alterations in addressing systemic inequalities not just by making statements but by taking steps and measures to create a positive and enduring impact.

Until next month…

GREAT BALLS OF FIRE

From page 95

growing its bricks and mortar store base. Unlike Wegmans, which builds and maintains customer loyalty through strong customer service and unique offerings, Walmart commands repeat business with a totally different approach - price, price, price.

***Kroger** – Much better year in Tidewater (primarily because of three new stores) than Richmond. Big Duke has noticed that Kroger's store conditions have diminished a bit - the big chain's stores have always had a "shopped in" vibe, but over the last 12 months there's too much sloppiness, especially in perishables. In Richmond, new stores opened by Publix and Whole Foods have impacted Kroger more so than any other merchant, but many of Kroger's challenges are internal, and better attention must be paid to improving store operations. One more Richmond observation: nobody in the market benefited more than Kroger did during the wild sales boom in March. And to Kroger's credit, its service levels were among the best at a time when supply chains were challenged.*

***Food Lion** – In Tidewater, Food Lion operates more stores than its next three supermarket competitors combined, so it's easy to realize that it's going to take a mighty wallop to move the needle downward. In Richmond, it's a similar story with not as many stores but similar total market penetration. Actually, the Ahold Delhaize USA "brand" made its strongest move last year when it remodeled and rolled out its "Easy, Fresh & Affordable" marketing theme that reinforced the company, which had been bleeding for a decade due to diminished investment and competitive marketing conditions. Even though its comp stores sales only grew modestly, Food Lion has re-established itself as a long-term player in both markets.*

***Harris Teeter** – The division of Kroger opened the former Farm Fresh in Chesapeake and was certainly helped by strong March sales created by COVID-related hoarding/panic buying. It also felt the strength of Wegmans' Virginia Beach debut, which affected several HT units and has permanently impacted its stores in that affluent area. Virginia Beach aside, Harris Teeter will remain a factor for many years because it remains the only upscale operator to serve its customer base throughout the entire Tidewater area.*

***Publix** – I still don't get it. For a company with so much firepower that builds attractive, clean stores with great customer service, Publix is still not unleashing its best fastball in this market. Pricing remains among the highest in the market, perishables are just okay, and the store ambience seems hospital-like. Yes, Big Duke is aware that Publix is*

See **GREAT BALLS** on page 115

IN REVIEW: ALDI

State	County	2020 Stores	2020 Sales (in millions)	2020 County Food Sales	% of 2020 County Market	2019 Stores	2019 Sales (in millions)	% of 2019 County Market
DC	Washington	1	$11.40	$2,196.50	0.52%	1	$10.70	0.52%
DC Recap: 1 store with sales of $11.4 million. Total retail food sales for DC in the study: $2.2 billion. Aldi share of DC is 0.52%.								
DE	Kent	2	$15.20	$466.70	3.26%	2	$17.10	3.69%
DE Recap: 2 stores with sales of $15.2 million. Total retail food sales for DE in the study: $1.33 billion. Aldi share of DE is 1.14%.								
MD	Anne Arundel	5	$40.30	$2,039.70	1.98%	3	$24.60	1.19%
MD	Baltimore City	4	$23.40	$1,368.20	1.71%	4	$22.70	1.66%
MD	Baltimore County	11	$67.40	$2,929.60	2.30%	11	$72.70	2.56%
MD	Carroll	1	$7.70	$595.40	1.29%	1	$7.30	1.25%
MD	Cecil	1	$7.40	$251.60	2.94%	1	$6.80	2.80%
MD	Frederick	2	$19.80	$827.60	2.39%	2	$19.20	2.43%
MD	Harford	3	$18.30	$929.60	1.97%	3	$17.50	2.00%
MD	Howard	1	$10.90	$1,090.20	1.00%	1	$9.70	0.93%
MD	Montgomery	5	$38.20	$3,412.40	1.12%	5	$36.50	1.13%
MD	Prince George's	11	$80.40	$2,836.10	2.83%	10	$66.20	2.32%
MD	St. Mary's	1	$6.80	$352.60	1.93%	1	$6.50	1.84%
MD	Talbot	1	$7.10	$196.20	3.62%	1	$6.80	3.54%
MD	Washington	1	$6.80	$461.20	1.47%	1	$6.50	1.44%
MD	Wicomico	1	$9.80	$263.40	3.72%	1	$9.40	3.63%
MD Recap: 48 stores with sales of $344.3 million. Total retail food sales for MD in the study: $18.96 billion. Aldi share of MD is 1.82%.								
PA	Cumberland	3	$20.80	$1,007.50	2.06%	3	$19.90	2.00%
PA	Dauphin	2	$17.80	$926.50	1.92%	2	$17.10	1.82%
PA	Franklin	1	$7.00	$413.50	1.69%	1	$6.70	1.69%
PA	Lancaster	4	$29.60	$1,556.20	1.90%	3	$21.40	1.45%
PA	Lebanon	1	$6.20	$379.40	1.63%	1	$5.90	1.61%
PA	York	3	$23.60	$1,420.80	1.66%	3	$25.20	1.84%
PA Recap: 14 stores with sales of $105.0 million. Total retail food sales for PA in the study: $4.99 billion. Aldi share of PA is 1.75%.								
VA	Chesapeake City	3	$16.90	$820.40	2.06%	3	$16.20	2.18%
VA	Chesterfield	4	$27.60	$1,299.90	2.12%	4	$26.80	2.13%
VA	Culpeper	1	$8.40	$140.50	5.98%	1	$8.10	5.72%
VA	Fairfax	12	$106.20	$4,850.20	2.19%	11	$91.40	1.96%
VA	Frederick	1	$7.40	$457.30	1.62%	1	$7.00	1.63%
VA	Gloucester	1	$9.10	$112.90	8.06%	1	$8.70	7.84%
VA	Hampton/Newport News	3	$21.80	$1,049.80	2.08%	3	$21.30	2.11%
VA	Hanover	1	$7.30	$424.30	1.72%	1	$6.90	1.69%
VA	Henrico	6	$37.50	$1,736.30	2.16%	6	$36.80	2.24%
VA	James City	1	$7.20	$381.20	1.89%	1	$6.80	1.84%
VA	Loudoun	3	$24.60	$1,379.20	1.78%	1	$7.90	0.60%
VA	Norfolk City	2	$2.05	$718.40	0.29%	0	$0.00	0.00%
VA	Portsmouth City	1	$7.30	$279.10	2.62%	1	$7.00	2.58%
VA	Prince William	5	$32.40	$1,688.30	1.92%	5	$30.40	1.80%
VA	Spotsylvania	3	$15.90	$693.80	2.29%	3	$17.10	2.51%
VA	Stafford	1	$7.20	$366.20	1.97%	1	$6.90	2.00%
VA	Suffolk City	1	$9.80	$277.80	3.53%	0	$0.00	0.00%
VA	Virginia Beach	5	$38.10	$1,498.70	2.54%	5	$36.50	2.46%
VA	Warren	1	$6.90	$140.20	4.92%	1	$6.60	4.90%
VA Recap: 55 stores with sales of $393.65 million. Total retail food sales for VA in the study: $21.56 billion. Aldi share of VA is 1.83%.								

Mid-Atlantic Recap: 120 stores with sales of $869.55 million annually. Mid-Atlantic retail food sales total: $50.04 billion.
Aldi Per Store Average: $7.25 million

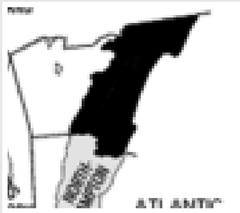
Source: *Food World*, June 2020

VIRGINIA COUNTY SHARE OF MARKET: 2020

Total sales for those Virginia counties included in this study are $21.56 billion

Rank	Company	Stores	Sales (in millions)	% of Market

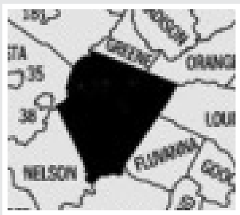
ACCOMACK COUNTY ($85.9 million) (Includes Chincoteague)



- Population 32,316
- # of households 13,401
- Median income $43,210
- Under age 18.................... 20.50%
- Over age 65...................... 23.60%
- Female 51.20%
- White 60.00%
- Black............................... 28.60%
- Hispanic 9.30%
- Asian................................. 0.80%

Rank	Company	Stores	Sales (in millions)	% of Market
1	Walmart (SuperCenter)	1	$29.90	34.81%
2	Food Lion	2	$28.30	32.95%
3	Royal Farm Stores	5	$10.90	12.69%
4	Walgreens	1	$5.00	5.82%
5	Great Valu	1	$4.70	5.47%
6	CVS	1	$4.00	4.66%
7	Fas-Marts	2	$3.40	3.96%
8	C&S Independents	1	$2.08	2.42%
		14	**$88.28**	**102.77%***

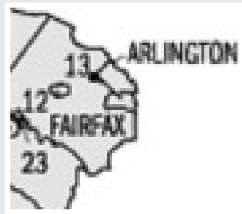
ALBEMARLE COUNTY Including CHARLOTTESVILLE ($579.7 million) (Includes, Keswick, White Hall)



- Population 156,596
- # of households 59,225
- Median income $67,163
- Under age 18.................... 17.90%
- Over age 65...................... 15.10%
- Female 51.90%
- White 71.30%
- Black............................... 17.90%
- Hispanic 5.80%
- Asian................................. 6.60%

Rank	Company	Stores	Sales (in millions)	% of Market
1	Kroger	3	$121.30	20.92%
2	Harris Teeter	3	$65.20	11.25%
3	Wegmans	1	$64.20	11.07%
4	Food Lion	6	$57.60	9.94%
5	Costco	1	$34.70	5.99%
6	Walmart	1	$34.10	5.88%
7	Giant Food	1	$33.39	5.76%
8	Whole Foods	1	$33.20	5.73%
9	CVS+	8	$28.40	4.90%
10	Sam's Club	1	$22.80	3.93%
11	Trader Joe's	1	$18.90	3.26%
12	7-Eleven	8	$15.00	2.59%
13	Fas-Marts	6	$12.50	2.16%
14	Target	1	$12.50	2.16%
15	Walgreens	2	$9.40	1.62%
16	Great Valu	1	$8.20	1.41%
17	Sheetz	1	$3.80	0.66%
18	Circle K	1	$1.80	0.31%
		47	**$576.99**	**99.53%**

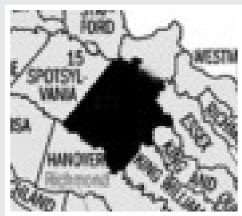
ARLINGTON COUNTY ($845.7 million) (Includes Arlington)



- Population 236,842
- # of households 104,716
- Median income $117,374
- Under age 18.................... 18.10%
- Over age 65...................... 10.60%
- Female 49.90%
- White 61.20%
- Black................................. 9.60%
- Hispanic 15.80%
- Asian............................... 11.00%

Rank	Company	Stores	Sales (in millions)	% of Market
1	Harris Teeter	6	$227.30	26.88%
2	Giant Food	4	$114.52	13.54%
3	CVS+	15	$80.60	9.53%
4	Whole Foods	2	$73.10	8.64%
5	Safeway	4	$64.85	7.67%
6	Costco	1	$61.40	7.26%
7	7-Eleven	28	$60.30	7.13%
8	Military Commissaries	1	$38.42	4.54%
9	Walgreens	6	$33.70	3.98%
10	Trader Joe's	1	$30.80	3.64%
11	Target	1	$19.80	2.34%
12	MOM's Organic Market	1	$13.50	1.60%
13	International Markets	1	$12.30	1.45%
14	Lidl	1	$7.90	0.93%
15	Streets Market	1	$5.90	0.70%
		73	**$844.39**	**99.85%**

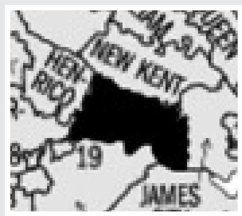
CAROLINE COUNTY ($30.7 million) (Includes Bowling Green)



- Population 30,725
- # of households 10,911
- Median income $64,715
- Under age 18.................... 23.00%
- Over age 65...................... 16.40%
- Female 50.60%
- White 63.50%
- Black............................... 27.50%
- Hispanic 5.00%
- Asian................................. 1.00%

Rank	Company	Stores	Sales (in millions)	% of Market
1	Food Lion	2	$15.60	52.17%
2	Walgreens	2	$9.70	32.44%
2	Sheetz	1	$4.10	13.71%
4	CVS	1	$3.90	13.04%
5	Rite Aid	1	$2.90	9.70%
6	7-Eleven	1	$2.10	7.02%
		8	**$38.80**	**98.97%**

CHARLES CITY COUNTY ($4.7 million) (Includes Charles City. Multi-store retailers do not operate in this county.)

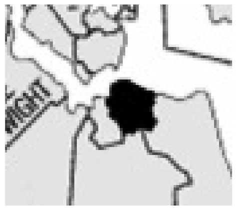


- Population 6,943
- # of households 2,856
- Median income $59,192
- Under age 18.................... 15.20%
- Over age 65...................... 24.60%
- Female 51.80%
- White 42.70%
- Black................................. 6.80%
- Hispanic 1.80%
- Asian................................. 0.60%

Multi-store retailers do not operate in this county.

See **VIRGINIA COUNTY SHARE** on page 105

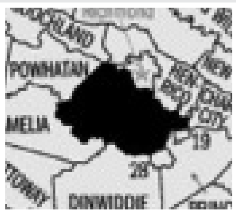
VIRGINIA COUNTY SHARE OF MARKET: 2020



CHESAPEAKE CITY ($820.4 million)

- Population 244,835
- # of households 84,230
- Median income $75,790
- Under age 18.................... 24.10%
- Over age 65...................... 13.30%
- Female 51.20%
- White 56.90%
- Black................................ 30.50%
- Hispanic 6.50%
- Asian.................................. 3.50%

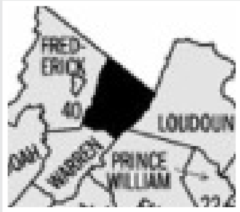
1	Walmart (SC/Neighborhood Mkt)	6	$146.20	17.82%
2	Kroger (Marketplace)	5	$132.30	16.13%
3	Food Lion	12	$128.10	15.61%
4	7-Eleven	41	$84.10	10.25%
5	Harris Teeter	3	$68.40	8.34%
6	Sam's Club	2	$64.50	7.86%
7	CVS	6	$35.80	4.36%
8	Rite Aid	9	$27.30	3.33%
9	Target	3	$26.70	3.25%
10	BJ's Wholesale Club	1	$26.10	3.18%
11	Walgreens	6	$24.50	2.99%
12	Wawa	4	$22.80	2.78%
13	Aldi	3	$16.90	2.06%
14	Lidl	1	$7.30	0.89%
15	Kmart	1	$4.60	0.56%
16	Miller Marts	2	$3.70	0.45%
17	Circle K	2	$3.50	0.43%
18	Royal Farm Stores	1	$2.40	0.29%
		108	**$825.20**	**100.59%***



CHESTERFIELD COUNTY Includes COLONIAL HEIGHTS ($1.3 billion) (Inlcuding Chester, Midlothian)

- Population 370,172
- # of households 130,064
- Median income $66,695
- Under age 18.................... 24.00%
- Over age 65...................... 17.30%
- Female 53.00%
- White 66.00%
- Black................................ 20.40%
- Hispanic 7.80%
- Asian.................................. 3.80%

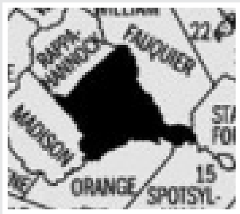
1	Kroger (Marketplace)	7	$243.40	18.98%
2	Walmart (SC/Neighborhood Mkt)	6	$217.40	16.95%
3	Food Lion	17	$190.70	14.87%
4	Wawa	14	$108.85	8.49%
5	CVS+	22	$94.70	7.38%
6	Wegmans	1	$58.30	4.55%
7	Target	5	$56.90	4.44%
8	Sam's Club	2	$55.60	4.34%
9	Walgreens	8	$44.40	3.46%
10	Publix	3	$43.40	3.38%
11	Costco	1	$43.20	3.37%
12	7-Eleven	18	$27.70	2.16%
13	Aldi	4	$27.60	2.15%
14	International Markets	3	$18.90	1.47%
15	Fresh Market	2	$18.00	1.40%
16	Sheetz	5	$16.30	1.27%
17	Rite Aid	5	$16.10	1.26%
18	Lidl	2	$12.70	0.99%
19	Dash-In	1	$1.90	0.15%
20	Circle K	1	$1.80	0.14%
		127	**$1,297.85**	**101.2%***



CLARKE COUNTY ($16.7 million) (Includes Berryville, Boyce)

- Population 14,619
- # of households 5,639
- Median income $77,936
- Under age 18.................... 19.90%
- Over age 65...................... 21.10%
- Female 50.20%
- White 85.40%
- Black................................ 4.80%
- Hispanic 6.30%
- Asian.................................. 1.50%

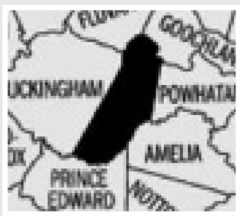
1	7-Eleven	3	$6.30	37.72%
2	Sheetz	1	$3.60	21.56%
3	Circle K	1	$1.70	10.18%
		5	**$11.60**	**69.46%**



CULPEPER COUNTY ($140.5 million) (Includes Culpeper, Rapidan)

- Population 52,605
- # of households 16,903
- Median income $73,116
- Under age 18.................... 24.80%
- Over age 65...................... 15.70%
- Female 50.00%
- White 70.10%
- Black................................ 14.80%
- Hispanic 11.30%
- Asian.................................. 1.70%

1	The Giant Company (Martin's)	1	$32.73	23.30%
2	Walmart (SuperCenter)	1	$28.40	20.21%
3	Target	1	$13.10	9.32%
4	7-Eleven	6	$12.50	8.90%
5	Safeway	1	$10.57	7.52%
6	Weis Markets	1	$9.30	6.62%
7	Aldi	1	$8.40	5.98%
8	Lidl	1	$7.10	5.05%
9	CVS+	2	$6.60	4.70%
10	Walgreens	1	$5.70	4.06%
11	Rite Aid	1	$3.30	2.35%
		17	**$137.70**	**98.01%**



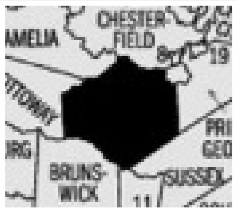
CUMBERLAND COUNTY ($9.2 million) (Includes Cumberland)

- Population 9,932
- # of households 3,963
- Median income $46,221
- Under age 18.................... 19.40%
- Over age 65...................... 22.40%
- Female 51.70%
- White 63.60%
- Black................................ 30.80%
- Hispanic 3.00%
- Asian.................................. 0.40%

Multi-store retailers do not operate in this county.

See VIRGINIA COUNTY SHARE on page 106

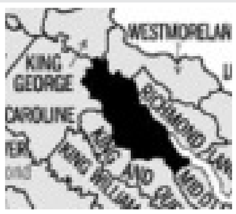
VIRGINIA COUNTY SHARE OF MARKET: 2020



DINWIDDIE COUNTY Including PETERSBURG ($123.2 million) (Includes Dinwiddie, Church Road)

- Population 59,890
- # of households 11,765
- Median income $46,007
- Under age 18.................. 21.30%
- Over age 65..................... 17.30%
- Female 52.30%
- White 38.30%
- Black.............................. 55.00%
- Hispanic 4.50%
- Asian................................ 1.00%

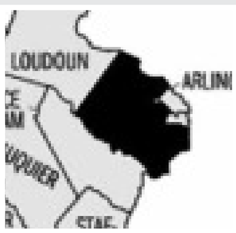
1	Walmart (SuperCenter)	1	$37.30	30.28%
2	Food Lion	4	$34.50	28.00%
3	Walgreens	2	$10.10	8.20%
4	Save-A-Lot	1	$5.60	4.55%
5	Wawa	1	$5.37	4.36%
6	International Markets	1	$5.30	4.30%
7	7-Eleven	2	$5.20	4.22%
8	CVS	1	$5.20	4.22%
9	Rite Aid	1	$4.20	3.41%
10	Sheetz	1	$3.90	3.17%
11	Fas-Marts	1	$1.80	1.46%
		16	**$118.47**	**96.16%**



ESSEX COUNTY ($57.5 million) (Includes Tappahannock)

- Population 10,953
- # of households 4,463
- Median income $52,681
- Under age 18.................. 18.60%
- Over age 65..................... 23.20%
- Female 53.20%
- White 54.50%
- Black.............................. 38.10%
- Hispanic 3.90%
- Asian................................ 1.10%

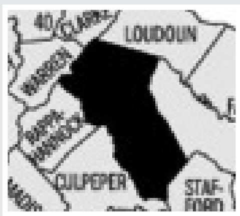
1	Walmart	1	$36.10	62.78%
2	Food Lion	1	$10.00	17.39%
3	Walgreens	1	$4.80	8.35%
4	Sheetz	1	$3.40	5.91%
5	Fas-Marts	1	$1.90	3.30%
		5	**$56.20**	**97.74%**



FAIRFAX CO. Including FALLS CHURCH, FAIRFAX, ALEXANDRIA ($4.9 billion) (Includes McLean, Reston, Springfield)

- Population 1,345,596
- # of households 478,241
- Median income $113,559
- Under age 18.................. 23.30%
- Over age 65..................... 13.10%
- Female 50.90%
- White 57.00%
- Black.............................. 11.20%
- Hispanic 15.40%
- Asian.............................. 14.00%

1	Giant Food	28	$1,002.29	20.66%
2	Safeway	24	$470.81	9.71%
3	International Markets	32	$373.40	7.70%
4	Costco	4	$326.50	6.73%
5	Wegmans	3	$309.70	6.39%
6	Harris Teeter	9	$302.60	6.24%
7	CVS+	65	$299.60	6.18%
8	Whole Foods	7	$263.70	5.44%
9	Walmart (SuperCenter)	8	$211.30	4.36%
10	Target	11	$193.20	3.98%
11	7-Eleven	113	$184.20	3.80%
12	Trader Joe's	7	$165.70	3.42%
13	Walgreens	24	$127.80	2.63%
14	BJ's Wholesale Club	3	$114.70	2.36%
15	Aldi	12	$106.20	2.19%
16	Shoppers	3	$90.90	1.87%
17	Military Commissaries	1	$80.38	1.66%
18	Balducci's	3	$51.90	1.07%
19	MOM's Organic Market	3	$46.10	0.95%
20	Fresh Market	2	$31.60	0.65%
21	Food Lion	2	$28.90	0.60%
22	Sprouts	1	$17.20	0.35%
23	Lidl	1	$6.40	0.13%
24	Streets Market	1	$6.30	0.13%
25	Circle K	3	$5.70	0.12%
26	ASG	1	$5.68	0.12%
27	Wawa	1	$4.70	0.10%
28	Sheetz	1	$3.80	0.08%
29	C&S Independents	1	$0.57	0.01%
		374	**$4,831.83**	**99.62%**



FAUQUIER COUNTY ($166.3 million) (Includes Remington, Warrenton)

- Population 71,222
- # of households 24,333
- Median income $97,469
- Under age 18.................. 23.40%
- Over age 65..................... 16.40%
- Female 50.50%
- White 79.40%
- Black.............................. 7.80%
- Hispanic 8.90%
- Asian................................ 1.70%

1	Walmart (SuperCenter)	1	$33.90	20.38%
2	Giant Food	1	$29.47	17.72%
3	Food Lion	3	$20.90	12.57%
4	Harris Teeter	1	$17.10	10.28%
5	Safeway	1	$15.16	9.12%
6	Sheetz	3	$12.60	7.58%
7	Walgreens	2	$10.10	6.07%
8	7-Eleven	6	$8.90	5.35%
9	CVS	2	$7.20	4.33%
10	Wawa	1	$4.30	2.59%
11	Rite Aid	1	$2.60	1.56%
12	Circle K	1	$2.00	1.20%
		23	**$164.23**	**98.76%**

See **VIRGINIA COUNTY SHARE** on page 107

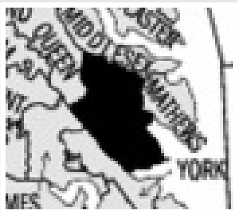
VIRGINIA COUNTY SHARE OF MARKET: 2020

FREDERICK COUNTY ($457.3 million) (Includes Stephens City)

- Population 58,014
- # of households 21,136
- Median income $58,535
- Under age 18.................... 21.80%
- Over age 65...................... 13.60%

- Female 52.50%
- White 62.20%
- Black................................ 13.00%
- Hispanic 14.70%
- Asian................................. 2.90%

1	Walmart (SuperCenter)	3	$130.60	28.56%
2	The Giant Company (Martin's)	3	$126.36	27.63%
3	Costco	1	$41.80	9.14%
4	CVS+	8	$27.80	6.08%
5	Target	2	$24.00	5.25%
6	Sheetz	6	$23.80	5.20%
7	Walgreens	3	$15.50	3.39%
8	Sharp Shopper	1	$14.80	3.24%
9	7-Eleven	9	$14.60	3.19%
10	Aldi	1	$7.40	1.62%
11	Rite Aid	1	$3.50	0.77%
		38	**$430.16**	**94.07%**

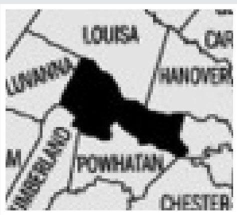


GLOUCESTER COUNTY ($112.9 million) (Includes Gloucester)

- Population 37,349
- # of households 14,759
- Median income $66,701
- Under age 18.................... 20.00%
- Over age 65...................... 19.10%

- Female 50.80%
- White 84.50%
- Black................................ 8.20%
- Hispanic 3.80%
- Asian................................. 0.90%

1	Walmart (SuperCenter)	1	$31.60	27.99%
2	Food Lion	2	$20.10	17.80%
3	Kroger	1	$18.70	16.56%
4	7-Eleven	8	$14.30	12.67%
5	Aldi	1	$9.10	8.06%
6	Rite Aid	2	$7.30	6.47%
7	Wawa	1	$6.60	5.85%
8	Walgreens	1	$5.00	4.43%
		17	**$112.70**	**99.82%**

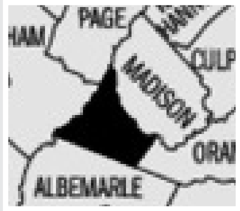


GOOCHLAND COUNTY ($26.6 million) (Includes Goochland, Manakin)

- Population 23,753
- # of households 8,426
- Median income $89,741
- Under age 18.................... 17.70%
- Over age 65...................... 22.30%

- Female 51.00%
- White 77.80%
- Black................................ 16.10%
- Hispanic 3.00%
- Asian................................. 1.60%

1	Food Lion	2	$19.30	70.96%
2	Wawa	1	$7.60	27.94%
		3	**$26.90**	**98.90%**

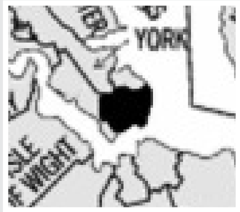


GREENE COUNTY ($20.4 million) (Includes Stanardsville)

- Population 19,819
- # of households 7,357
- Median income $64,979
- Under age 18.................... 23.90%
- Over age 65...................... 17.40%

- Female 51.30%
- White 82.60%
- Black................................ 7.00%
- Hispanic 6.10%
- Asian................................. 1.90%

1	Food Lion	1	$8.60	42.16%
2	Great Valu	1	$7.50	36.76%
3	CVS	1	$4.10	20.10%
		3	**$20.20**	**99.02%**



HAMPTON/NEWPORT NEWS CITY ($1.1 billion)

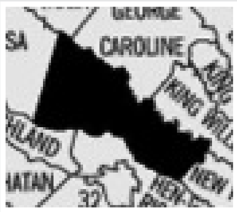
- Population 313,735
- # of households 123,024
- Median income $53,217
- Under age 18.................... 22.00%
- Over age 65...................... 14.30%

- Female 51.80%
- White 40.30%
- Black................................ 46.90%
- Hispanic 7.60%
- Asian................................. 2.90%

1	Food Lion	16	$244.70	23.31%
2	Walmart (SC/Neighborhood Mkt)	5	$137.20	13.07%
3	7-Eleven	59	$111.20	10.59%
4	Military Commissaries	2	$75.62	7.20%
5	Walgreens	9	$45.20	4.31%
6	Kroger	2	$41.60	3.96%
7	Harris Teeter	2	$35.80	3.41%
8	CVS+	8	$34.20	3.26%
9	BJ's Wholesale Club	1	$34.10	3.25%
10	Costco	1	$33.90	3.23%
11	Sam's Club	1	$31.90	3.04%
12	Wawa	6	$31.50	3.00%
13	Rite Aid	9	$29.40	2.80%
14	Whole Foods	1	$29.10	2.77%
15	Lidl	3	$24.20	2.31%
16	Target	2	$24.20	2.31%
17	Aldi	3	$21.80	2.08%
18	Save-A-Lot	4	$16.10	1.53%
19	Trader Joe's	1	$14.60	1.39%
20	International Markets	1	$11.00	1.05%
21	Fresh Market	1	$10.90	1.04%
22	Miller Marts	5	$7.20	0.69%
23	Circle K	1	$1.70	0.16%
		143	**$1,047.12**	**99.74%**

See VIRGINIA COUNTY SHARE on page 108

VIRGINIA COUNTY SHARE OF MARKET: 2020

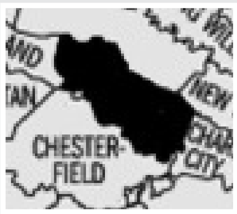


HANOVER COUNTY ($424.3 million) (Includes Ashland, Mechanicsville)

- Population 107,766
- # of households 38,599
- Median income $88,652
- Under age 18.................... 22.00%
- Over age 65...................... 17.70%

- Female 51.10%
- White 83.70%
- Black................................ 9.40%
- Hispanic 3.20%
- Asian................................. 1.80%

1	Walmart (SC/Neighborhood Mkt)	3	$94.80	22.34%
2	Kroger (Marketplace)	2	$83.70	19.73%
3	Food Lion	6	$64.20	15.13%
4	BJ's Wholesale Club	1	$29.60	6.98%
5	Publix	1	$12.80	6.32%
6	CVS+	6	$25.40	5.99%
7	Wawa	4	$20.70	4.88%
8	Walgreens	3	$15.30	3.61%
9	Target	1	$14.50	3.42%
10	7-Eleven	7	$14.30	3.37%
11	Fas-Marts	8	$11.10	2.62%
12	Aldi	1	$7.30	1.72%
13	Sheetz	2	$6.10	1.44%
14	Dash-In	1	$2.00	0.47%
15	Circle K	1	$1.50	0.35%
		47	**$403.30**	**95.1%**

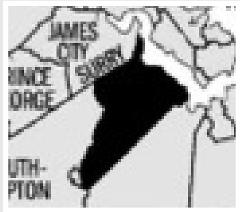


HENRICO COUNTY Including RICHMOND CITY ($1.7 billion) (Includes Highland Springs, Sandston)

- Population 561,254
- # of households 216,957
- Median income $56,845
- Under age 18.................... 20.10%
- Over age 65...................... 14.40%

- Female 52.60%
- White 47.20%
- Black................................ 39.40%
- Hispanic 6.90%
- Asian................................. 5.70%

1	Kroger (Marketplace)	9	$275.60	16.05%
2	Walmart (SuperCenter)	7	$250.20	14.57%
3	Food Lion	14	$170.10	9.91%
4	CVS+	30	$129.20	7.52%
5	Publix	9	$118.10	6.88%
6	Walgreens	21	$117.20	6.82%
7	Wawa	12	$97.23	5.66%
8	7-Eleven	49	$95.70	5.57%
9	Target	6	$78.90	4.59%
10	Wegmans	1	$61.40	3.58%
11	Whole Foods	2	$41.80	2.45%
12	Costco	1	$39.50	2.30%
13	BJ's Wholesale Club	1	$39.20	2.28%
14	Aldi	6	$37.50	2.18%
15	Sam's Club	1	$34.80	2.03%
16	International Markets	2	$28.50	1.66%
17	Lidl	4	$24.70	1.44%
18	Fresh Market	2	$21.70	1.26%
19	Fas-Marts	15	$18.60	1.08%
20	Trader Joe's	1	$17.10	1.00%
21	Rite Aid	3	$10.90	0.63%
22	Save-A-Lot	3	$10.40	0.61%
23	B. Green (Shoppers Value)	1	$7.00	0.41%
24	Dash-In	2	$4.40	0.26%
25	Sheetz	1	$3.70	0.22%
26	Miller Marts	1	$1.60	0.09%
		204	**$1,735.03**	**99.92%**

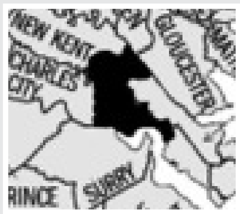


ISLE OF WIGHT COUNTY ($82.3 million) (Includes Smithfield)

- Population 37,106
- # of households 14,304
- Median income $71,376
- Under age 18.................... 20.80%
- Over age 65...................... 19.10%

- Female 51.00%
- White 70.30%
- Black................................ 23.40%
- Hispanic 3.30%
- Asian................................. 1.00%

1	Food Lion	3	$31.40	38.15%
2	Kroger	1	$24.00	29.16%
3	CVS	2	$10.10	12.27%
4	Rite Aid	2	$7.40	8.99%
5	Royal Farm Stores	1	$2.40	2.92%
6	7-Eleven	1	$2.10	2.55%
7	Miller Marts	1	$1.70	2.07%
		11	**$79.10**	**96.11%**



JAMES CITY CO. Including WILLIAMSBURG ($381.2 million) (Includes Norge, Toano)

- Population 91,477
- # of households 33,436
- Median income $44,356
- Under age 18.................... 15.80%
- Over age 65...................... 20.80%

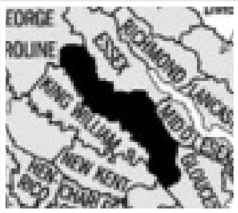
- Female 52.90%
- White 71.70%
- Black................................ 14.90%
- Hispanic 6.50%
- Asian................................. 4.60%

1	Harris Teeter	3	$89.60	23.50%
2	Walmart (SC/Neighborhood Mkt)	2	$66.50	17.44%
3	Food Lion	5	$52.90	13.88%
4	CVS+	6	$29.80	7.82%
5	7-Eleven	17	$23.40	6.14%
6	Target	2	$21.70	5.69%
7	Trader Joe's	1	$15.90	4.17%
8	Rite Aid	4	$14.90	3.91%
9	Publix	1	$13.30	3.49%
10	Fresh Market	1	$11.90	3.12%

See VIRGINIA COUNTY SHARE on page 109

VIRGINIA COUNTY SHARE OF MARKET: 2020

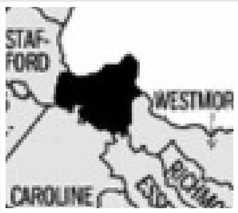
11	Wawa	2	$10.10	2.65%
12	Aldi	1	$7.20	1.89%
13	Walgreens	1	$6.20	1.63%
14	Fas-Marts	2	$4.10	1.08%
15	Miller Marts	1	$1.60	0.42%
		49	**$369.10**	**96.83%**



KING & QUEEN COUNTY ($5.6 million)
(Includes King & Queen Courthouse)

- Population 7,025
- # of households 2,826
- Median income $56,514
- Under age 18.................... 17.60%
- Over age 65...................... 22.90%
- Female 49.30%
- White 65.70%
- Black............................... 26.70%
- Hispanic 3.30%
- Asian................................. 0.50%

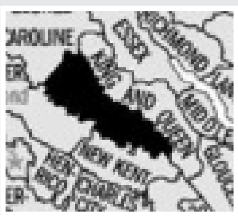
Multi-store retailers do not operate in this county.



KING GEORGE COUNTY ($84.2 million)
(Includes King George)

- Population 26,836
- # of households 9,103
- Median income $87,321
- Under age 18.................... 24.90%
- Over age 65...................... 13.10%
- Female 49.40%
- White 73.40%
- Black............................... 16.20%
- Hispanic 5.70%
- Asian................................. 1.50%

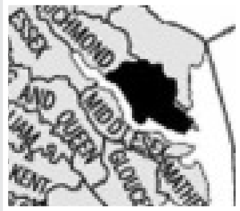
1	Walmart (SuperCenter)	1	$31.50	37.41%
2	Food Lion	2	$23.70	28.15%
3	Sheetz	2	$8.10	9.62%
4	Wawa	1	$6.10	7.24%
5	CVS	1	$4.50	5.34%
6	Fas-Marts	2	$3.50	4.16%
7	7-Eleven	2	$3.40	4.04%
8	Military Commissaries	1	$2.32	2.76%
		12	**$83.12**	**98.72%**



KING WILLIAM COUNTY ($37.3million)
(Includes West Point)

- Population 17,148
- # of households 6,170
- Median income $68,720
- Under age 18.................... 23.10%
- Over age 65...................... 16.10%
- Female 51.10%
- White 77.00%
- Black............................... 15.70%
- Hispanic 2.70%
- Asian................................. 1.30%

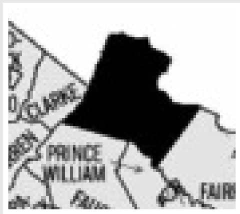
1	Food Lion	2	$26.70	71.58%
2	7-Eleven	2	$4.00	10.72%
3	Rite Aid	1	$3.70	9.92%
4	Fas-Marts	1	$1.90	5.09%
		6	**$36.30**	**97.32%**



LANCASTER COUNTY ($79.8 million)
(Includes Kilmarnock)

- Population 10,603
- # of households 5,142
- Median income $50,739
- Under age 18.................... 16.00%
- Over age 65...................... 36.10%
- Female 52.90%
- White 66.80%
- Black............................... 29.00%
- Hispanic 2.30%
- Asian................................. 0.70%

1	Walmart (SuperCenter)	1	$30.70	38.47%
2	Great Valu	1	$13.80	17.29%
3	Food Lion	1	$12.80	16.04%
4	Sharp Shopper	1	$10.60	13.28%
5	Walgreens	1	$5.30	6.64%
6	CVS	1	$3.60	4.51%
7	Fas-Marts	1	$1.90	2.38%
		7	**$78.70**	**98.62%**



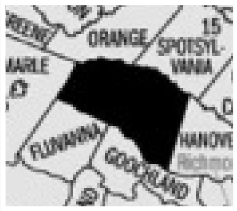
LOUDOUN COUNTY ($1.4 billion)
(Includes Ashburn, Leesburg, Sterling)

- Population 413,528
- # of households 125,309
- Median income $136,268
- Under age 18.................... 28.30%
- Over age 65........................ 9.30%
- Female 50.50%
- White 55.30%
- Black................................. 8.00%
- Hispanic 13.80%
- Asian............................... 20.00%

1	Giant Food	9	$243.56	17.72%
2	Harris Teeter	10	$234.90	17.09%
3	Wegmans	2	$168.40	12.25%
4	Costco	2	$135.40	9.85%
5	Walmart (SuperCenter)	3	$107.80	7.84%
6	International Markets	4	$64.10	4.66%
7	CVS+	12	$51.30	3.73%
8	Target	3	$48.80	3.55%
9	Walgreens	10	$48.30	3.51%
10	Safeway	4	$45.76	3.33%
11	7-Eleven	22	$33.70	2.45%
12	Food Lion	3	$33.50	2.44%
13	Sam's Club	1	$33.10	2.41%
14	Whole Foods	1	$30.60	2.23%
15	Aldi	3	$24.60	1.79%
16	Lidl	3	$20.60	1.50%
17	Trader Joe's	1	$17.50	1.27%
18	Sheetz	4	$15.60	1.14%
19	Wawa	1	$5.78	0.42%
20	Royal Farm Stores	2	$4.80	0.35%
21	Circle K	1	$2.00	0.15%
		101	**$1,370.10**	**99.70%**

See VIRGINIA COUNTY SHARE on page 110

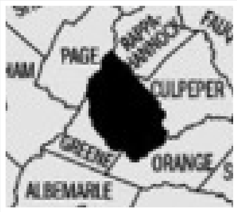
VIRGINIA COUNTY SHARE OF MARKET: 2020



LOUISA COUNTY ($44.2 million) (Includes Louisa, Mineral)

- sPopulation........................ 37,591
- # of households 13,575
- Median income $59,343
- Under age 18.................... 20.10%
- Over age 65...................... 19.80%
- Female 50.60%
- White 78.00%
- Black............................... 15.80%
- Hispanic 3.10%
- Asian................................ 0.70%

1	Food Lion	2	$19.90	45.02%
2	Sheetz	2	$7.30	16.52%
3	Walgreens	1	$4.90	11.09%
4	B. Green (Shoppers Value)	1	$4.70	10.63%
5	CVS	1	$4.60	10.41%
6	Fas-Marts	1	$1.90	4.30%
		8	**$43.30**	**97.96%**



MADISON COUNTY ($13.3 million) (Includes Madison)

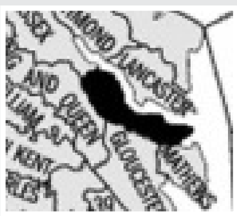
- Population 13,261
- # of households 5,078
- Median income $54,197
- Under age 18.................... 20.40%
- Over age 65...................... 22.30%
- Female 51.70%
- White 84.50%
- Black................................ 9.20%
- Hispanic 3.10%
- Asian................................ 0.70%

1	Food Lion	1	$12.10	90.98%
		1	**$12.10**	**90.98**

MATHEWS COUNTY ($14.2 million) (Includes Mathews)

- Population 8,834
- # of households 3,908
- Median income $67,009
- Under age 18.................... 15.50%
- Over age 65...................... 31.10%
- Female 51.90%
- White 85.30%
- Black................................ 8.70%
- Hispanic 2.80%
- Asian................................ 1.00%

1	Food Lion	1	$12.40	87.32%
		1	**$12.40**	**87.32%**



MIDDLESEX COUNTY ($29.1 million) (Includes Urbanna)

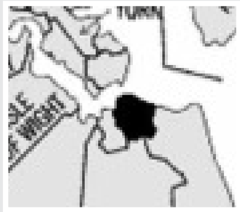
- Population 10,582
- # of households 4,454
- Median income $51,917
- Under age 18.................... 16.40%
- Over age 65...................... 31.10%
- Female 51.30%
- White 77.50%
- Black............................... 16.80%
- Hispanic 2.80%
- Asian................................ 0.50%

1	Food Lion	1	$12.80	43.99%
2	7-Eleven	5	$10.30	35.40%
3	Great Valu	1	$5.60	19.24%
		7	**$28.70**	**98.63%**

NEW KENT COUNTY ($47.3 million) (Includes New Kent, Providence, Forge)

- Population 23,091
- # of households 7,754
- Median income $79,698
- Under age 18.................... 20.00%
- Over age 65...................... 17.20%
- Female 48.90%
- White 78.20%
- Black............................... 13.70%
- Hispanic 3.70%
- Asian................................ 1.20%

1	Food Lion	3	$31.40	66.38%
2	Walgreens	2	$9.70	20.51%
3	Fas-Marts	2	$4.20	8.88%
4	Circle K	1	$1.90	4.02%
		8	**$47.20**	**99.79%**



NORFOLK CITY ($718.4 million)

- Population 242,742
- # of households 88,155
- Median income $49,146
- Under age 18.................... 19.60%
- Over age 65...................... 11.20%
- Female 47.90%
- White 43.30%
- Black............................... 42.30%
- Hispanic 8.40%
- Asian................................ 3.90%

1	Walmart (SC/Neighborhood Mkt)	4	$140.70	19.59%
2	Food Lion	8	$116.80	16.26%
3	7-Eleven	48	$89.40	12.44%
4	Harris Teeter	3	$60.20	8.38%
5	CVS+	7	$41.10	5.72%
6	Costco	1	$39.60	5.51%
7	Walgreens	6	$33.80	4.70%
8	Wawa	6	$33.40	4.65%
9	Military Commissaries	1	$32.82	4.57%
10	BJ's Wholesale Club	1	$26.80	3.73%
11	Kroger	1	$20.90	2.91%
12	Rite Aid	6	$17.90	2.49%
13	Fresh Market	1	$15.10	2.10%
14	Target	1	$12.10	1.68%
15	Save-A-Lot	2	$9.80	1.36%
16	Lidl	1	$7.70	1.07%
17	Royal Farm Stores	1	$2.70	0.38%
18	Aldi	2	$2.05	0.29%
19	Miller Marts	1	$1.80	0.25%
		101	**$704.67**	**98.09%**

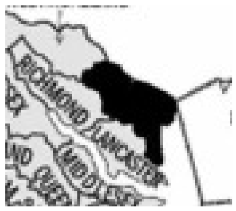
NORTHAMPTON COUNTY ($33.8 million) (Includes Cape Charles, Exmore)

- Population 11,710
- # of households 5,151
- Median income $43,553
- Under age 18.................... 19.60%
- Over age 65...................... 26.40%
- Female 52.30%
- White 54.40%
- Black............................... 33.90%
- Hispanic 9.30%
- Asian................................ 1.00%

1	Food Lion	2	$19.40	57.40%

See VIRGINIA COUNTY SHARE on page 111

2	Royal Farm Stores	2	$5.10	15.09%
3	Fas-Marts	2	$4.30	12.72%
4	Walgreens	1	$4.20	12.43%
		7	**$33.00**	**97.63%**



NORTHUMBERLAND COUNTY ($18.8 million) (Includes Heathsville)

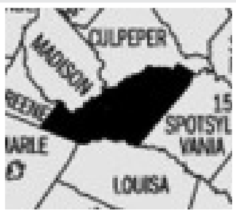
- Population 12,095
- # of households 5,686
- Median income $58,677
- Under age 18................... 14.50%
- Over age 65..................... 36.70%
- Female 51.00%
- White 69.10%
- Black............................... 25.00%
- Hispanic 3.80%
- Asian................................ 0.50%

1	Food Lion	1	$12.50	66.49%
2	Walgreens	1	$4.30	22.87%
3	Fas-Marts	1	$1.80	9.57%
		3	**$18.60**	**98.94%**

NOTTOWAY COUNTY ($35.8 million) (Includes Crewe, Nottoway)

- Population 15,232
- # of households 5,542
- Median income $42,869
- Under age 18................... 19.10%
- Over age 65..................... 19.20%
- Female 45.90%
- White 54.00%
- Black............................... 39.30%
- Hispanic 4.70%
- Asian................................ 0.70%

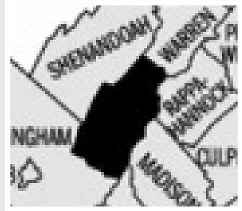
1	Walmart (SuperCenter)	1	$30.90	86.31%
2	Fas-Marts	1	$2.10	5.87%
		2	**$33.00**	**92.18%**



ORANGE COUNTY ($109.2 million) (Includes Gordonsville, Orange)

- Population 37,051
- # of households 13,453
- Median income $68,481
- Under age 18................... 21.10%
- Over age 65..................... 20.40%
- Female 51.20%
- White 77.70%
- Black............................... 13.30%
- Hispanic 5.30%
- Asian................................ 1.10%

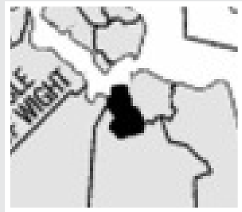
1	Walmart (SuperCenter)	2	$58.40	53.48%
2	Food Lion	3	$25.90	23.72%
3	CVS	2	$11.20	10.26%
4	Sheetz	2	$7.90	7.23%
5	7-Eleven	3	$5.90	5.40%
6	Fas-Marts	3	$5.90	5.40%
		15	**$115.20**	**105.49%***



PAGE COUNTY ($64.8 million) (Includes Elgin, Luray)

- Population 23,902
- # of households 9,338
- Median income $47,951
- Under age 18................... 19.90%
- Over age 65..................... 21.40%
- Female 50.60%
- White 93.90%
- Black............................... 2.10%
- Hispanic 2.10%
- Asian................................ 0.50%

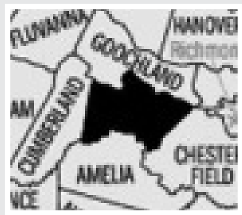
1	Walmart	1	$34.90	53.86%
2	Food Lion	2	$10.20	15.74%
3	7-Eleven	3	$6.80	10.49%
4	B. Green (Shoppers Value)	1	$5.60	8.64%
5	CVS	1	$4.50	6.94%
6	Circle K	1	$1.90	2.93%
		9	**$63.90**	**98.61%**



PORTSMOUTH CITY ($279.1 million)

- Population 94,398
- # of households 36,471
- Median income $50,224
- Under age 18................... 23.30%
- Over age 65..................... 14.90%
- Female 52.00%
- White 37.30%
- Black............................... 54.40%
- Hispanic 4.70%
- Asian................................ 1.50%

1	Food Lion	5	$64.40	23.07%
2	Military Commissaries	1	$38.49	13.79%
3	Kroger (Marketplace)	1	$35.10	12.58%
4	Walmart (SuperCenter)	1	$28.30	10.14%
5	7-Eleven	15	$25.50	9.14%
6	Harris Teeter	1	$21.10	7.56%
7	CVS	3	$14.20	5.09%
8	Rite Aid	3	$12.40	4.44%
9	Walgreens	2	$11.00	3.94%
10	Wawa	2	$9.10	3.26%
11	Aldi	1	$7.30	2.62%
12	Save-A-Lot	1	$6.10	2.19%
13	Royal Farm Stores	1	$2.70	0.97%
		37	**$275.69**	**98.78%**



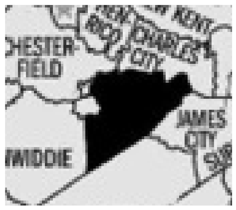
POWHATAN COUNTY ($67.9 million) (Includes Powhatan)

- Population 29,652
- # of households º10,178
- Median income $83,914
- Under age 18................... 18.20%
- Over age 65..................... 18.20%
- Female 48.20%
- White 86.00%
- Black............................... 9.50%
- Hispanic 2.40%
- Asian................................ 0.60%

1	Walmart (SuperCenter)	1	$34.70	51.10%
2	Food Lion	2	$20.80	30.63%
3	Sheetz	2	$7.20	10.60%
4	CVS	1	$4.30	6.33%
		6	**$67.00**	**98.67%**

See **VIRGINIA COUNTY SHARE** on page 112

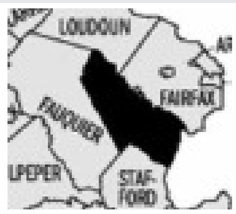
VIRGINIA COUNTY SHARE OF MARKET: 2020



PRINCE GEORGE CO. Including HOPEWELL ($79.6 million) (Includes Prince George)

- Population 60,882
- # of households 20,608
- Median income $53,749
- Under age 18.................... 23.80%
- Over age 65...................... 14.80%
- Female 49.60%
- White 50.00%
- Black............................... 37.70%
- Hispanic 8.40%
- Asian................................. 1.80%

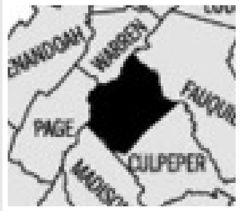
1	Military Commissaries	1	$29.48	38.34%
2	Food Lion	2	$19.40	25.23%
3	7-Eleven	2	$4.90	6.37%
4	Walgreens	1	$4.40	5.72%
5	Rite Aid	2	$4.30	5.59%
6	CVS	1	$4.20	5.46%
7	Save-A-Lot	1	$3.90	5.07%
8	Sheetz	1	$3.80	4.94%
		11	**$74.38**	**96.72%**



PRINCE WILLIAM CO. Including MANASSAS, MANASSAS PK. ($1.7 billion) (Includes Dale City, Quantico, Woodbridge)

- Population 528,898
- # of households 157,928
- Median income $87,525
- Under age 18.................... 25.60%
- Over age 65........................ 9.50%
- Female 49.50%
- White 38.10%
- Black............................... 17.60%
- Hispanic 34.00%
- Asian................................. 9.20%

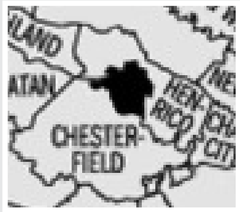
1	International Markets	11	$214.20	12.79%
2	Wegmans	2	$190.70	11.39%
3	Giant Food	7	$186.08	11.11%
4	Harris Teeter	4	$115.80	6.92%
5	Food Lion	9	$114.70	6.85%
6	7-Eleven	61	$113.50	6.78%
7	Walmart (SuperCenter)	5	$105.30	6.29%
8	CVS+	18	$81.60	4.87%
9	Costco	2	$70.20	4.19%
10	Safeway	4	$60.50	3.61%
11	BJ's Wholesale Club	2	$57.10	3.41%
12	Walgreens	10	$55.60	3.32%
13	Target (Super Target)	4	$53.70	3.21%
14	Wawa	5	$46.38	2.77%
15	Military Commissaries	1	$45.83	2.74%
16	Lidl	3	$36.80	2.20%
17	Aldi	5	$32.40	1.94%
18	Shoppers	1	$28.80	1.72%
19	Sam's Club	1	$28.50	1.70%
20	Sheetz	8	$28.10	1.68%
21	MOM's Organic Market	1	$12.40	0.74%
22	Circle K	2	$3.70	0.22%
23	C&S Independents	1	$0.97	0.06%
		167	**$1,682.86**	**100.51%***



RAPPAHANNOCK COUNTY ($5 million) (Includes Washington)

- Population 7,370
- # of households 2,976
- Median income $68,438
- Under age 18.................... 16.20%
- Over age 65...................... 27.30%
- Female 50.90%
- White 88.70%
- Black................................. 4.40%
- Hispanic 3.80%
- Asian................................. 0.90%

Multi-store retailers do not operate in this county.



RICHMOND COUNTY ($20.3 million) (Includes Elevon, Warsaw)

- Population 9,023
- # of households 3,139
- Median income $49,831
- Under age 18.................... 17.20%
- Over age 65...................... 21.00%
- Female 43.70%
- White 60.40%
- Black............................... 29.80%
- Hispanic 7.20%
- Asian................................. 0.60%

1	Food Lion	1	$12.10	59.61%
2	Walgreens	1	$4.10	20.20%
3	7-Eleven	1	$2.00	9.85%
		3	**$18.20**	**89.66%**

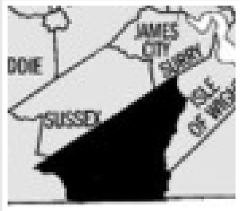
SHENANDOAH COUNTY ($108.8 million) (Includes Strasburg, Woodstock)

- Population 43,616
- # of households 17,315
- Median income $54,921
- Under age 18.................... 21.20%
- Over age 65...................... 21.70%
- Female 51.10%
- White 87.40%
- Black................................. 2.80%
- Hispanic 7.30%
- Asian................................. 1.20%

1	Food Lion	3	$37.00	34.01%
2	Walmart (SuperCenter)	1	$33.00	30.33%
3	Walgreens	2	$8.40	7.72%
4	Sheetz	2	$8.30	7.63%
5	Save-A-Lot	1	$8.10	7.44%
6	7-Eleven	5	$7.50	6.89%
7	CVS	1	$3.60	3.31%
8	Circle K	1	$2.00	1.84%
		16	**$107.90**	**99.17%**

See VIRGINIA COUNTY SHARE on page 113

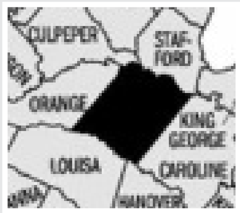
VIRGINIA COUNTY SHARE OF MARKET: 2020



SOUTHAMPTON COUNTY ($83.6 million) (Includes Courtland)

- Population 25,598
- # of households 10,048
- Median income $47,493
- Under age 18.................... 21.00%
- Over age 65...................... 20.00%
- Female 51.10%
- White 49.50%
- Black............................... 46.40%
- Hispanic 2.20%
- Asian................................. 0.75%

1	Walmart (SuperCenter)	1	$38.30	45.81%
2	Food Lion	2	$25.90	30.98%
3	7-Eleven	3	$5.90	7.06%
4	Walgreens	1	$4.60	5.50%
5	Rite Aid	1	$2.80	3.35%
6	Circle K	1	$2.10	2.51%
		9	**$79.60**	**95.22%**



SPOTSYLVANIA COUNTY Including FREDERICKSBURG ($693.8 million) (Includes Spotsylvania)

- Population 165,251
- # of households 54,259
- Median income $91,704
- Under age 18.................... 22.80%
- Over age 65...................... 12.70%
- Female 52.30%
- White 63.20%
- Black............................... 20.70%
- Hispanic 10.70%
- Asian................................. 3.00%

1	Walmart (SuperCenter)	4	$142.10	21.04%
2	CVS+	15	$74.90	11.09%
3	Giant Food	2	$71.11	10.53%
4	Wawa	9	$70.90	10.50%
5	Wegmans	1	$65.80	9.74%
6	Weis Markets	5	$42.70	6.32%
7	Costco	1	$29.40	4.35%
8	BJ's Wholesale Club	1	$27.50	4.07%
9	Target (Super Target)	2	$27.40	4.06%
10	Lidl	2	$19.60	2.90%
11	7-Eleven	12	$18.40	2.72%
12	Sheetz	5	$18.40	2.72%
13	Walgreens	4	$18.40	2.72%
14	Aldi	3	$15.90	2.35%
15	Fas-Marts	11	$15.00	2.22%
16	Publix	1	$12.70	1.88%
17	Food Lion	1	$10.70	1.58%
18	Royal Farm Stores	3	$8.30	1.23%
19	Miller Marts	1	$1.60	0.24%
		83	**$690.81**	**102.27%***

STAFFORD COUNTY ($366.2 million) (Includes Aquia, Falmouth, Stafford)

- Population 152,882
- # of households 46,328
- Median income $106,773
- Under age 18.................... 26.10%
- Over age 65...................... 10.50%
- Female 49.60%
- White 60.40%
- Black............................... 19.50%
- Hispanic 13.60%
- Asian................................. 3.70%

1	Giant Food	3	$97.74	27.91%
2	Walmart (SuperCenter)	2	$52.20	14.91%
3	Wawa	5	$52.03	14.86%
4	Weis Markets	3	$33.00	9.42%
5	Target	2	$30.60	8.74%
6	Shoppers	1	$27.50	7.85%
7	7-Eleven	15	$25.60	7.31%
8	CVS+	4	$17.90	5.11%
9	Aldi	1	$7.20	2.06%
10	Lidl	1	$7.00	2.00%
11	Sheetz	1	$5.10	1.46%
12	Royal Farm Stores	1	$2.60	0.74%
13	Fas-Marts	1	$2.00	0.57%
14	Circle K	1	$1.70	0.49%
		41	**$362.17**	**103.42%***

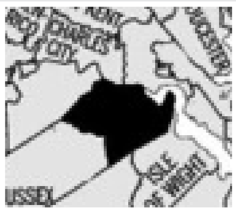
SUFFOLK CITY ($277.8 million)

- Population 92,108
- # of households 33,198
- Median income $70,664
- Under age 18.................... 24.30%
- Over age 65...................... 14.40%
- Female 51.60%
- White 49.10%
- Black............................... 42.40%
- Hispanic 2.80%
- Asian................................. 1.90%

1	Walmart (SuperCenter)	2	$66.30	23.87%
2	Kroger (Marketplace)	2	$62.30	22.43%
3	Food Lion	5	$44.40	15.98%
4	Harris Teeter	1	$24.40	8.78%
5	7-Eleven	9	$17.90	6.44%
6	Walgreens	3	$13.20	4.75%
7	Rite Aid	3	$12.00	4.32%
8	Aldi	1	$9.80	3.53%
9	Lidl	1	$7.60	2.74%
10	CVS	1	$4.60	1.66%
11	Wawa	1	$4.50	1.62%
12	Circle K	2	$3.60	1.30%
13	Miller Marts	2	$3.40	1.22%
		33	**$274.00**	**98.63%**

See VIRGINIA COUNTY SHARE on page 114

VIRGINIA COUNTY SHARE OF MARKET: 2020

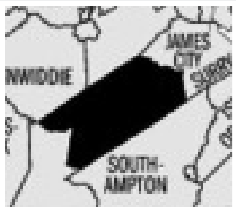


SURRY COUNTY ($4.1 million)
(Includes Surry)

- Population 6,422
- # of households 2,760
- Median income $54,844
- Under age 18.................... 16.70%
- Over age 65...................... 22.70%

- Female 50.60%
- White 52.90%
- Black................................ 42.30%
- Hispanic 2.50%
- Asian................................. 0.50%

1	7-Eleven	1	$1.80	43.90%
		1	**$1.80**	**43.90%**



SUSSEX COUNTY ($7.8 million)
(Includes Sussex, Wakefield)

- Population 11,159
- # of households 3,814
- Median income $45,801
- Under age 18.................... 15.40%
- Over age 65...................... 17.80%

- Female 40.70%
- White 38.80%
- Black................................ 56.70%
- Hispanic 3.10%
- Asian................................. 0.40%

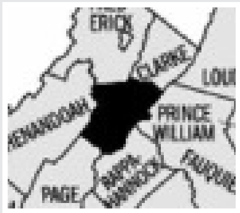
1	Great Valu	1	$4.10	52.56%
2	7-Eleven	1	$2.30	29.49%
		2	**$6.40**	**82.05%**

VIRGINIA BEACH CITY ($1.5 billion)

- Population 449,974
- # of households 169,290
- Median income $74,186
- Under age 18.................... 22.10%
- Over age 65...................... 14.20%

- Female 50.90%
- White 61.30%
- Black................................ 20.30%
- Hispanic 8.30%
- Asian................................. 7.40%

1	Food Lion	21	$220.60	14.72%
2	Walmart (SC/Neighborhood Mkt)	7	$209.40	13.97%
3	Harris Teeter	9	$176.20	11.76%
4	7-Eleven	77	$151.30	10.10%
5	Kroger (Marketplace)	5	$130.70	8.72%
6	Wegmans	1	$63.50	4.24%
7	Walgreens	14	$61.30	4.09%
8	CVS+	13	$53.90	3.60%
9	Wawa	9	$52.20	3.48%
10	Target	4	$48.40	3.23%
11	Rite Aid	18	$48.20	3.22%
12	Military Commissaries	1	$47.25	3.15%
13	Aldi	5	$38.10	2.54%
14	Sam's Club	1	$36.90	2.46%
15	BJ's Wholesale Club	1	$35.60	2.38%
16	Whole Foods	1	$31.50	2.10%
17	International Markets	2	$27.20	1.81%
18	Lidl	4	$24.50	1.63%
19	Fresh Market	2	$23.60	1.57%
20	Trader Joe's	1	$17.20	1.15%
21	Miller Marts	3	$4.80	0.32%
22	Royal Farm Stores	1	$3.30	0.22%
23	Circle K	1	$2.00	0.13%
		201	**$1,502.65**	**100.25%***

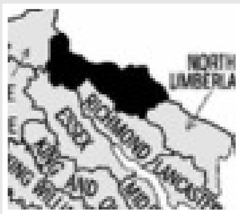


WARREN COUNTY ($140.2 million)
(Includes Front Royal)

- Population 40,164
- # of households 14,739
- Median income $68,189
- Under age 18.................... 22.00%
- Over age 65...................... 16.00%

- Female 50.20%
- White 86.60%
- Black................................ 4.90%
- Hispanic 4.90%
- Asian................................. 1.30%

1	The Giant Company (Martin's)	1	$47.84	34.12%
2	Walmart (SuperCenter)	1	$36.80	26.25%
3	7-Eleven	8	$16.60	11.84%
4	Target	1	$14.70	10.49%
5	CVS+	2	$7.10	5.06%
6	Aldi	1	$6.90	4.92%
7	Rite Aid	1	$2.90	2.07%
8	Royal Farm Stores	1	$2.50	1.78%
9	Circle K	1	$1.90	1.36%
		17	**$137.24**	**97.89%**



WESTMORELAND COUNTY ($45.1 million)
(Includes Colonial Beach)

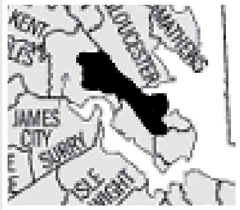
- Population 18,015
- # of households 7,612
- Median income $54,268
- Under age 18.................... 18.90%
- Over age 65...................... 25.40%

- Female 51.20%
- White 64.00%
- Black................................ 26.20%
- Hispanic 6.70%
- Asian................................. 0.90%

1	Food Lion	2	$23.50	52.11%
2	Walgreens	2	$8.40	18.63%
3	Great Valu	1	$5.10	11.31%
4	7-Eleven	2	$4.10	9.09%
5	Fas-Marts	1	$1.90	4.21%
		8	**$43.00**	**95.34%**

See **VIRGINIA COUNTY SHARE** on page 115

VIRGINIA COUNTY SHARE OF MARKET: 2020



YORK COUNTY Including POQUOSON ($163.7 million) (Includes Yorktown)

- Population 68,280
- # of households 24,617
- Median income $90,367
- Under age 18.................... 23.80%
- Over age 65...................... 16.10%
- Female 51.00%
- White 70.50%
- Black............................... 13.80%
- Hispanic 6.60%
- Asian................................. 5.90%

1	Food Lion	4	$42.60	26.02%
2	Kroger	2	$37.80	23.09%
3	Walmart (SuperCenter)	1	$35.90	21.93%
4	Kmart	1	$11.80	7.21%
5	Walgreens	2	$10.30	6.29%
6	7-Eleven	5	$9.90	6.05%
7	Wawa	1	$7.80	4.76%
8	Rite Aid	2	$7.30	4.46%
9	CVS	1	$4.30	2.63%
10	Royal Farm Stores	1	$2.40	1.47%
11	Circle K	1	$1.80	1.10%
		21	**$171.90**	**105.01%***

( ) 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.

+ Stand-alone CVS and in-Target pharmacies

Source: *Food World*, June 2020

GREAT BALLS OF FIRE

From page 102

determined to stay the course with a plan that's made it the nation's most profitable retailer in the country, and it is the fastest growing retailer in Richmond with three new stores this past year and two others on the way. But as Peggy Lee once sang, "Is that all there is?"

***Aldi** – When German rival Lidl came to town three years ago and stated that it wanted its stores near existing Aldi units, you might have thought that Aldi was vulnerable. Wrong thought. Not only has Aldi staved off Lidl's charge, they've kicked butt against all comers. After beefing up its Richmond base last year, the extreme value merchant added three Tidewater stores over the last 12 months. Big Duke believes that Aldi has an all-world game: strong retails, excellent private label quality and differentiation and a very loyal customer base. Aldi is already a significant factor in both markets and promises to only get stronger in the next few years.*

Legislative Line

from page 68

the public and private sector in lots of ways such as for educational purposes as well as for marketing tools. However, as often expected, the long road to completion of the 2020 Dietary Guidelines, like any major and controversial project of this nature, often runs into roadblocks. Why? Simply because in this case a diverse list of organizations has been closely watching every single step of the drafting process. Now, just as the drafting nears completion, *Politico* reported that a group called the Nutrition Coalition has written to USDA and HHS asking to delay the release of the Dietary Guidelines Advisory Committee's conclusions. The group alleges that some "whistleblowers" from the committee have come forward with "serious concerns" about the process. Concerns have been mentioned along several fronts including from not having enough time to complete scientific reviews to leaving out dozens of low-carb clinical trials, etc. "The federal government cannot ignore these allegations and should delay publication of the Dietary Guidelines advisory committee's expert report to address and potentially remediate them," said Nina Teicholz, executive director of the Nutrition Coalition. We doubt if this whistleblower report will delay the draft report but in government circles, one never knows which way the wind will blow. Watch for my additional updates next month.

Have a great summer. Stay safe.

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