

Total US Grocery Sales,* Store Numbers, and Market Share by Channel, 2014

	Sales \$Million	No. of Stores	% of Sales
Traditional	\$547,436	40,835	46.3
Nontraditional	\$453,663	60,325	38.6
Total C-Stores**	\$177,721	159,238	15.1
GRAND TOTAL	\$1,178,820	260,398	100.0

*Grocery sales only (food and nonfood); excludes electronics, prescription drugs, toys, jewelry, sporting goods, gas, clothing, footwear, knickknacks, and hardlines. **Sales exclude gas.

Source: The Future of Food Retailing, Willard Bishop, June 2015

Sales

Traditional Grocery Channel

Total Traditional	\$547,436	40,835	46.3	46.1
	\$462,276	26,490	39.2	36.8
Fresh Format	\$15,913	1,190	1.3	2.3
Ltd Assortment	\$34,589	3,893	2.9	3.9
Super Warehouse	\$21,633	565	1.8	2.0
Other (small groc.)	\$13,024	8,697	1.1	1.1

Source: The Future of Food Retailing, Willard Bishop, June 2015

US Grocery Sales,* Store Numbers and Market Share of Total Grocery Sales by Store Format, 2014, and Projected Share, 2019

Nontraditional Grocery Channel

	2014 Sales \$Million	2014 No. of Stores	2014 % of Sales	2019 % of Sales
Total Nontrad'l	\$453,663	60,325	38.6	38.8
Wholesale Club	\$102,100	1,414	8.7	9.2
Supercenter	\$207,495	3,947	17.6	18.3
Dollar Store	\$30,349	28,268	2.6	2.7
Drug	\$61,086	23,444	5.2	5.1
		3,074	4.1	3.2
Military	\$4,774	179	0.4	

*Grocery sales only (includes food and non-food); excludes electronics, prescription drugs, toys, jewelry, sporting goods, and, (clothing, footwear, knives, tools, hardware, electronics, prescription drugs, toys, jewelry, Source: The Future of Food Retailing, Willard Bishop, June 2015

US Grocery Store Format Characteristics, 2014

Traditional Grocery Channel

	Total	Average	Average	
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Total Traditional			\$247,379	
Conven.	52,200	45,000	\$335,599	100
Fresh Format	33,400	21,000	\$257,072	100
Ltd Assortment	13,300	2,900	\$170,872	100
Super Warehouse	46,200	37,000	\$736,406	100
Other (small groc.)	9,000	3,000	\$28,801	100

Source: The Future of Food Retailing, Willard Bishop, June 2015

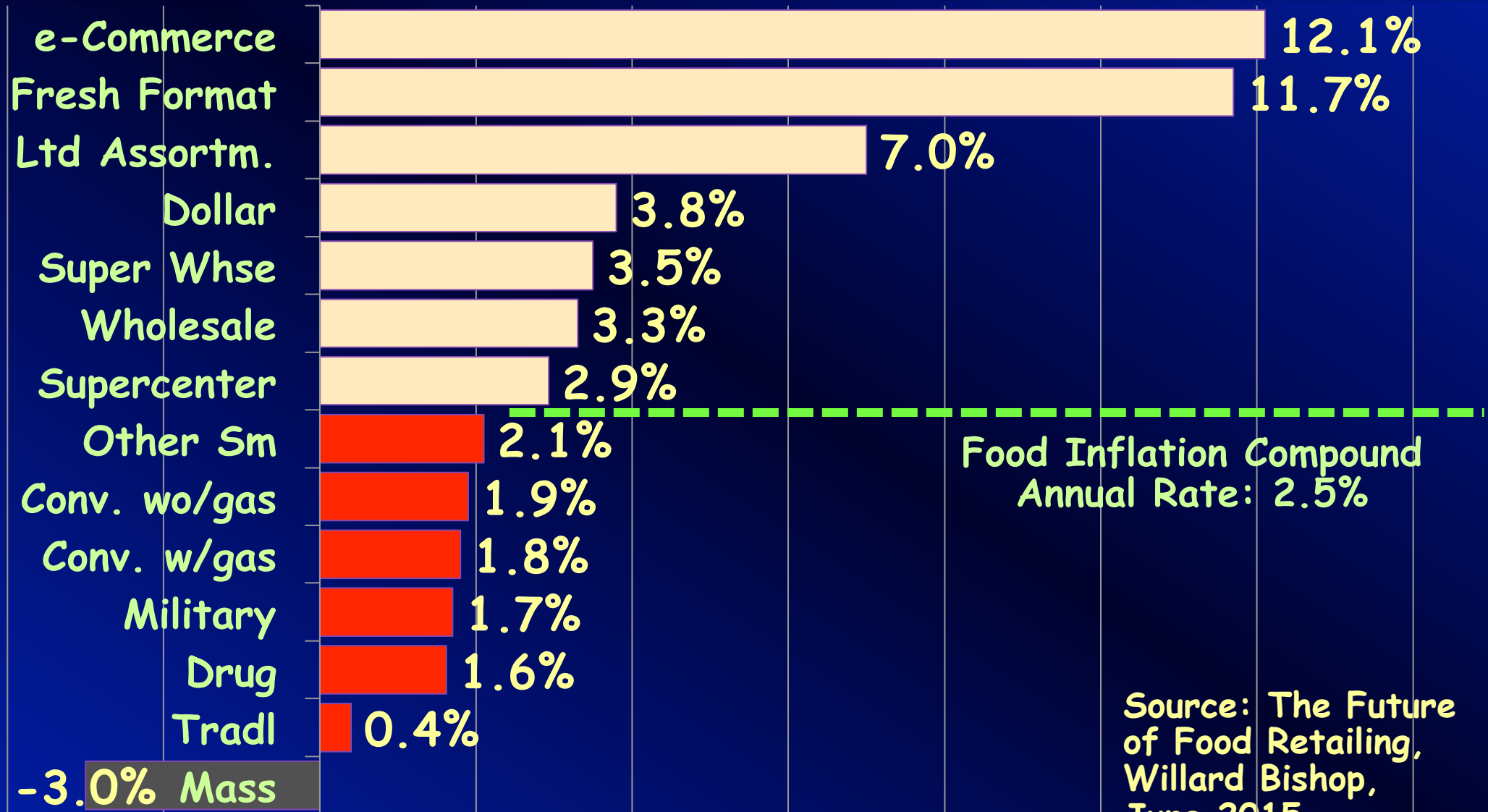
Nontraditional Grocery Channel

	Store Area Area	Total SKUs SKUs	Weekly Sales \$ Sales \$	Consum& % Sales. % Sales
Nontrad'l			\$144,621	
Wholesale Club	129,400	4,800	\$1,388,428	59
Supercenter	167,800	100,000	\$1,011,006	60
Dollar Store	8,100	9,400	\$20,646	66
Drug	10,800	19,000	\$50,109	34
Mass	65,100	95,000	\$299,445	23
Military	29,400	15,000	\$512,972	100

Source: The Future of Food Retailing, Willard Bishop, June 2015 hardlines.

Source: The Future of Food Retailing, Willard Bishop, June 2015

Forecast of Compound Annual Sales Growth Rate vs. Inflation 2014-2019



Source: The Future of Food Retailing, Willard Bishop, June 2015