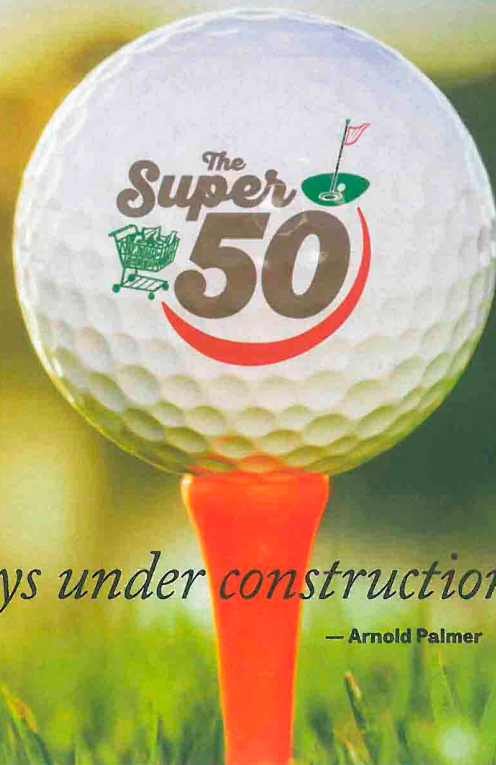


# Turf War

Aces and duffers alike face challenges, leverage opportunities to boost their positions on the cutthroat course.

By Meg Major, Jim Dudlicek, Bridget Goldschmidt, Randy Hofbauer and Katie Martin



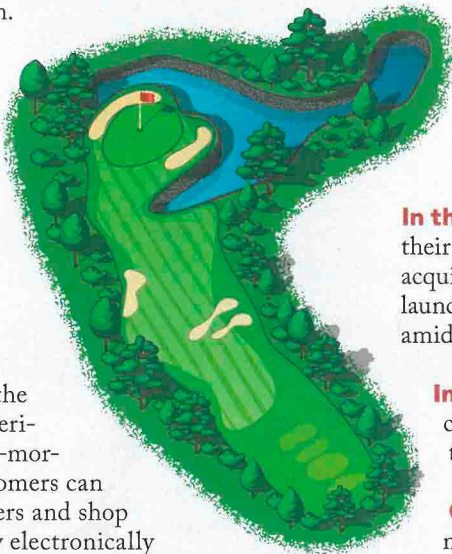
*“The road to success is always under construction.”*

— Arnold Palmer

**T**he quote above as true in golf as it is in business, and certainly grocery retailing is no exception. Increasingly with each passing year, supermarket operators are forced to review, refine and, in many cases, reinvent the way they operate. Smart retailers keep one eye keenly fixed on the next drive and the other over their shoulder, trained on their competition.

And competition is everywhere these days — next door, across the street, online, pulling up in a delivery van or maybe even dropped from above by a drone.

To be sure, Amazon is the wild card in this high-stakes match. The retailer is delving deeper into grocery, including the fresh side, and even experimenting with brick-and-mortar locations where customers can both pick up online orders and shop for live product, and pay electronically without checkstands. Amazon has been named as a potential buyer of Whole Foods Market by some, B.J.’s Wholesale Club by others.



As is *PG*’s custom every year, we’ve ranked the industry’s top 50 food retailers, based on the total sales generated in their most recent fiscal years.

Breaking down the key players, our editorial team decided a golf theme would be appropriate to frame its analysis. To that end, we’ve pursued a course as follows:

**On the Leaderboard:** The market leaders, its dominant players, maintaining a firm grasp on their leadership positions in the industry.

**Adjusting Their Swing:** These retailers are taking steps to refine their games to better serve their customers and improve their competitive edge.

**In the Hunt:** These retailers are actively working to boost their position in the marketplace, through mergers and acquisitions, by expanding into new territories, or by launching new initiatives to demonstrate their relevance amid their competitive field.

**In the Rough:** These retailers are historically strong companies, but are struggling to maintain their positions as they weather current market conditions.

**On Par:** These are the stalwarts, retailers that are maintaining their positions by satisfying their core shoppers and staying the course.

So with that — fore!


  
**PROGRESSIVEGROCER'S** **2017 CONTENDERS**

2017 Rank	2016 Rank	Company	Fiscal Year-end Sales (000)	No. of Supermarkets	Top Banners	Employees (Total or Full-time Equivalents)	Website
1	1	<b>Wal-Mart Stores Inc.*</b> Bentonville, Ark.	\$307,833,000	4,221	Walmart Supercenter Walmart Neighborhood Market	1,284,668 FTE	www.walmart.com
2	2	<b>The Kroger Co.</b> Cincinnati	\$115,337,000	2,796	Kroger Harris Teeter Ralphs	237,873 FTE	www.thekrogerco.com
3	3	<b>AB Acquisition LLC</b> Boise, Idaho	\$60,493,940	2,337	Safeway Albertsons Vons	276,000 TOTAL	www.albertsons.com www.safeway.com
4	5/7	<b>Ahold Delhaize</b> Quincy, Mass./Salisbury, N.C.	\$42,946,000	1,990	Food Lion Stop & Shop Hannaford	220,000 TOTAL	www.aholddelhaize.com
5	4	<b>Publix Super Markets, Inc.</b> Lakeland, Fla.	\$33,999,921	1,145	Publix Publix Sabor Publix GreenWise	191,000 TOTAL	www.publix.com
6	6	<b>H-E-B Grocery Co.</b> San Antonio	\$23,000,000	320	H-E-B H-E-B Plus H-E-B Central Market	80,000 TOTAL	www.heb.com
7	8	<b>Meijer Inc.</b> Grand Rapids, Mich.	\$16,500,000	230	Meijer	70,000 TOTAL	www.meijer.com
8	9	<b>Wakefern Food Corp.</b> Keasbey, N.J.	\$16,000,000	198	ShopRite Price Rite The Fresh Grocer	16,830 FTE	www.wakefern.shoprite.com
9	10	<b>Whole Foods Market Inc.</b> Austin, Texas	\$15,724,000	436	Whole Foods Market 365 By Whole Foods Market	87,000 TOTAL	www.wholefoodsmarket.com
10	13	<b>Aldi US Inc.</b> Batavia, Ill.	\$13,008,580	1,600	Aldi Food Store	25,000 TOTAL	www.aldi.us
11	12	<b>Southeastern Grocers LLC</b> Jacksonville, Fla.	\$11,820,900	738	Winn-Dixie Bi-Lo Harveys	60,000 TOTAL	www.segrocers.com www.bi-lo.com www.winndixie.com
12	11	<b>Trader Joe's Co.</b> Monrovia, Calif.	\$10,290,540	460	Trader Joe's	9,453 FTE	www.traderjoes.com
13	15	<b>Hy Vee Inc.</b> West Des Moines, Iowa	\$9,800,000	244	Hy-Vee	84,000 TOTAL	www.hy-vee.com
14	16	<b>Giant Eagle Inc.</b> Pittsburgh	\$9,500,000	223	Giant Eagle Giant Eagle Market District	34,000 TOTAL	www.gianteagle.com
15	17	<b>Wegmans Food Markets Inc.</b> Rochester, N.Y.	\$8,300,000	92	Wegmans	47,000 TOTAL	www.wegmans.com
16	14	<b>Target Corp.</b> Minneapolis	\$7,252,700	247	SuperTarget	65,515 FTE	www.target.com
17	19	<b>WinCo Foods Inc.</b> Boise, Idaho	\$6,500,000	114	WinCo	17,000 TOTAL	www.wincofoods.com
18	20	<b>Defense Commissary</b> Arlington, Va.	\$5,560,000	169	DeCA Commissary	15,000 TOTAL	www.commissaries.com
19	18	<b>Supervalu Inc.</b> Eden Prairie, Minn.	\$4,596,000	217	Shop 'N Save Cub Foods Shoppers Food Warehouse	29,000 TOTAL	www.supervalu.com
20	23	<b>Smart &amp; Final Inc.</b> Los Angeles	\$4,341,795	305	Smart & Final Extra Smart & Final Cash & Carry	11,949 TOTAL	www.smartandfinal.com
21	22	<b>Stater Bros. Markets</b> San Bernardino, Calif.	\$4,300,000	169	Stater Bros	18,000 TOTAL	www.staterbros.com
22	21	<b>The Save Mart Cos.</b> Modesto, Calif.	\$4,200,000	207	Save Mart Lucky Food Maxx	15,500 TOTAL	www.savemart.com
23	26	<b>Sprouts Farmers Market</b> Phoenix	\$4,046,385	253	Sprouts Farmers Market	24,000 TOTAL	www.sprouts.com
24	25	<b>Price Chopper/ The Golub Corp.</b> Schenectady, N.Y.	\$3,858,400	136	Price Chopper Market Bistro by Price Chopper Market 32	11,898 FTE	www.pricechopper.com
25	24	<b>Ingles Markets Inc.</b> Asheville, N.C.	\$3,794,977	201	Ingles Sav-Mar	26,500 TOTAL	www.ingles-markets.com

\* Sales figure represents total U.S. annual sales; retailer doesn't break out sales by retail format.

Source: Nielsen TDLinx, March 2017; Progressive Grocer Market Research, 2017

2017 Rank	2016 Rank	Company	Fiscal Year-end Sales (000)	No. of Supermarkets	Top Banners	Employees (Total or Full-time Equivalents)	Website
26	27	<b>Demoulas Supermarkets Inc./ Market Basket</b> Tewksbury, Mass.	\$3,203,200	77	Market Basket	8,068 FTE	www.mydemoulas.net
27	28	<b>Raleys Supermarkets Inc.</b> West Sacramento, Calif.	\$3,200,000	121	Raley's Bel Air Market Nob Hill	12,000 TOTAL	www.raleys.com
28	29	<b>Weis Markets, Inc.</b> Sunbury, Pa.	\$3,136,720	204	Weis	23,000 TOTAL	www.weismarkets.com
29	n/a	<b>Save-A-Lot</b> Earth City, Mo.	\$2,715,076	433	Save-A-Lot	10,474 FTE	www.save-a-lot.com
30	32	<b>Key Food Stores Co-operative Inc.</b> Staten Island, N.Y.	\$2,700,000	240	Key Food Food Universe Key Food Marketplace	4,325 FTE	www.keyfood.com
31	31	<b>Schnuck Markets Inc.</b> St. Louis	\$2,700,000	100	Schnucks Culinaria	14,000 TOTAL	www.schnucks.com
32	30	<b>Tops Markets Inc.</b> Williamsville, N.Y.	\$2,456,767	177	Tops Friendly Markets	14,800 TOTAL	www.topsmarkets.com
33	33	<b>Brookshire Grocery Co.</b> Tyler, Texas	\$2,339,480	177	Brookshire Super 1 Spring Market	8,025 FTE	www.brookshires.com
34	35	<b>K-VA-T Food Stores Inc.</b> Abingdon, Va.	\$2,046,460	133	Food City Super Dollar	7,002 FTE	www.foodcity.com
35	34	<b>SpartanNash Co.</b> Grand Rapids, Mich.	\$2,029,045	157	Family Fare D & W Fresh Markets Sun Mart Foods	14,700 TOTAL	www.spartannash.com
36	36	<b>Houchens Industries Inc.</b> Bowling Green, Ky.	\$1,964,924	389	Save-A-Lot IGA Food Giant	8,913 FTE	www.houchensindustries.com
37	40	<b>Big Y Foods Inc.</b> Springfield, Mass.	\$1,900,000	71	Big Y	11,000 TOTAL	www.bigy.com
38	37	<b>The Fresh Market Inc.</b> Greensboro, N.C.	\$1,700,000	175	The Fresh Market	10,000 TOTAL	www.thefreshmarket.com
39	39	<b>Bashas' Inc.</b> Chandler, Ariz.	\$1,654,380	116	Bashas' Food City AJ's Fine Foods	5,313 FTE	www.bashas.com
40	44	<b>Village Super Market Inc.</b> Springfield, N.J.	\$1,634,904	29	ShopRite	6,544 TOTAL	www.villagesupermarkets.com
41	38	<b>Grocery Outlet Inc.</b> Emeryville, Calif.	\$1,540,136	270	Grocery Outlet	7,230 FTE	www.groceryoutlet.com
42	41	<b>Foodarama Supermarkets Inc.</b> Freehold, N.J.	\$1,466,400	29	ShopRite	3,905 FTE	www.shoprite.com
43	42	<b>Inserra Supermarkets Inc.</b> Mahwah, N.J.	\$1,354,600	23	ShopRite	3,068 FTE	www.shoprite.com
44	45	<b>Fiesta Mart Inc.</b> Houston	\$1,289,860	70	Fiesta Mart	5,385 FTE	www.fiestamart.com
45	43	<b>Woodman's Food Markets Inc.</b> Janesville, Wis.	\$1,288,300	16	Woodman's Food Market	2,755 FTE	www.woodmans-food.com
46	n/a	<b>Bodega Latina</b> Paramount, Calif.	\$1,188,200	58	EI Super	3,494 FTE	www.elsupermarkets.com
47	47	<b>Lowe's Pay-N-Save Food Stores Inc.</b> Littlefield, Texas	\$1,112,488	146	Lowe's Food King Lowe's Big 8	3,714 FTE	www.lowesmarket.com
48	46	<b>Central Grocers Inc.</b> Joliet, Ill.	\$1,079,000	37	Strack & Van Til Ultra Warehouse Foods	3,249 FTE	www.central-grocers.com
49	50	<b>Alex Lee Inc.</b> Hickory, N.C.	\$1,041,300	93	Lowe's Food Stores JustSave	9,000 TOTAL	www.lowesfoods.com
50	49	<b>Marc Glassman Inc.</b> Cleveland	\$1,021,800	58	Marc's	5,727 FTE	www.marcs.com

\* Sales figure represents total U.S. annual sales; retailer doesn't break out sales by retail format.

Source: Nielsen TDLinx, March 2017; Progressive Grocer Market Research, 2017

## The Super 50 Methodology

Information for *Progressive Grocer's* annual Super 50 is compiled from direct guidance from retailers and/or data sourced from public records, including 10K, annual reports and corporate websites. For privately held companies, results are based on information from Nielsen TDLinX, which collects and maintains store information across all channels selling consumer packaged goods.

The four categories within the Super 50 report include annual sales from the most recently concluded fiscal year, store count, top banners and employee counts, either total or full-time equivalents. Full-time equivalent employees are the sum of regular workers, plus one-half the number of part-time employees.

Nielsen TDLinX uses Food Marketing Institute's definition of a supermarket: a grocery store with a minimum of \$2 million in annual sales; its data omit sales from convenience, drug and other retail channels that may be part of total revenue for some companies. Wholesale membership clubs such as Sam's Club, Costco and BJ's Wholesale Club are also not included. Supercenters are included, but only for their grocery-equivalent

merchandise. Not included are soft goods; clothing; general merchandise such as hardware, appliances, computers and auto service; and other items not common to supermarkets.

Sales estimates from Nielsen TDLinX are presented in terms of all-commodity volume (ACV), which is defined as an annualized range of the estimated retail sales volume of all items sold at a retail site that pass through the retailer's cash registers.

Nielsen TDLinX's ACV is an estimate based on best available data — a directional measure to be used as an indicator of store and account size, not an actual retail sales report. All data are collected by Nielsen TDLinX from a wide range of independent sources, and then enhanced with computer modeling. Information shown is from the March 2017 database.

Take a deeper dive into *PG's* Super 50 with the Marketing Guidebook Advantage, which is updated daily and provides a versatile online database with in-depth company profiles, market share analytics and contact information. Retailers included in the Marketing Guidebook Advantage include the nation's top 100 food retailers, as well as more than 2,000 other retail chains and distributors. For more information, visit [www.RetailBuyers.net](http://www.RetailBuyers.net), call 813-713-4301 or contact [klopez@ensembleiq.com](mailto:klopez@ensembleiq.com).

