

Regional Catastrophic Preparedness for Food and Water Supply Disruptions: Recruiting Private Sector Strategic Relationships



**MAPPING THE SUPPLY
CHAIN**



**BUILDING STRATEGIC
PARTNERSHIPS**



**USING DATA TO
IMPROVE RESPONSE**

Mid-Atlantic Food Flows Collaborative

VISION: Demand and supply networks for food and related critical freight will continue to flow with best possible volume and velocity even on worst days.

MISSION

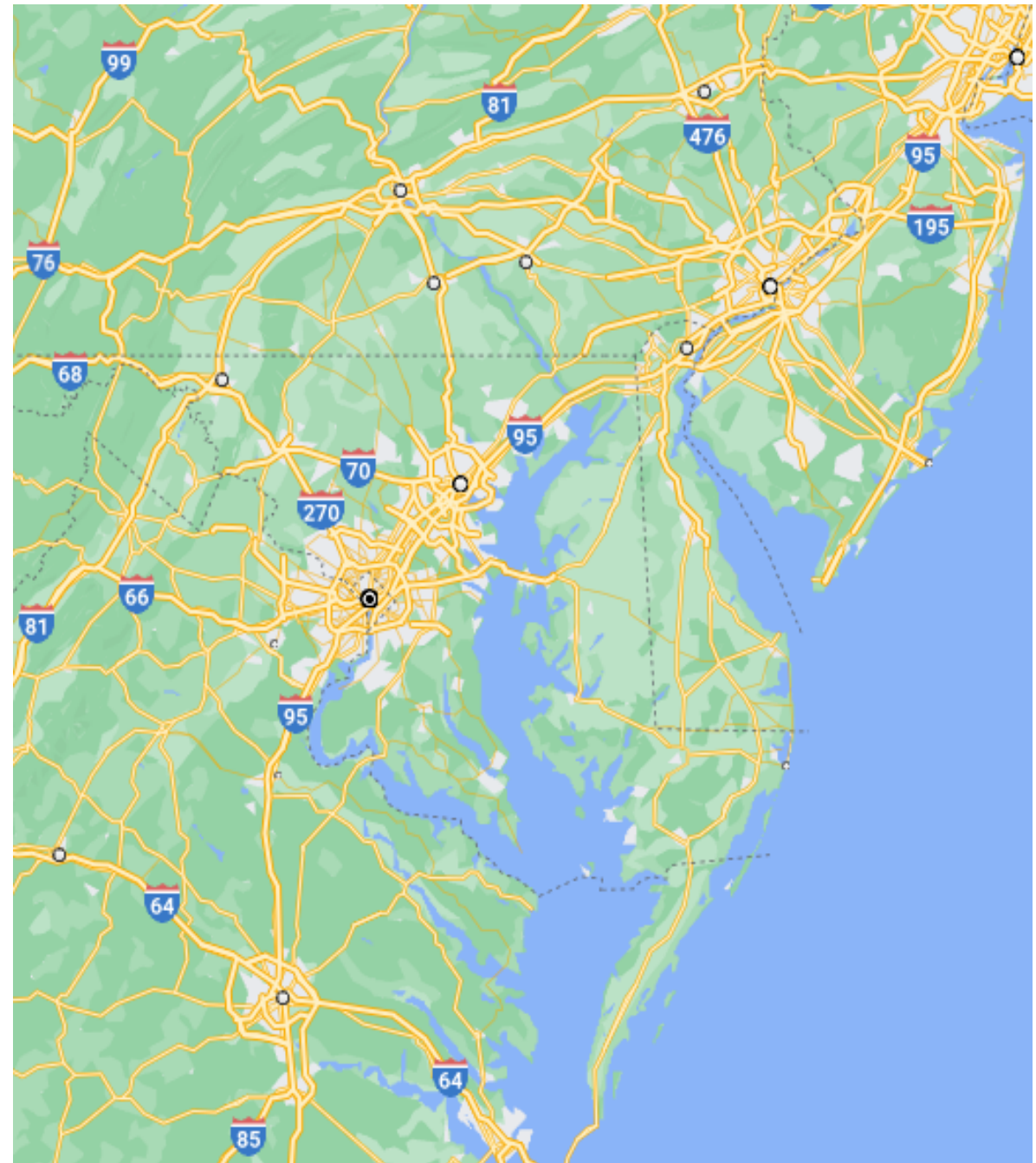
Facilitate private-private and private-public collaboration and information sharing to achieve the vision.

Prepare and mitigate before the worst day to better achieve the vision on the worst day.

Identify and serve significant shifts in demand caused by extreme events.

Remove and mitigate physical, regulatory, and other impediments to flow.

Prioritize restoring electric power, road access, fuel availability, communications, and other essential services needed to achieve the vision



Philadelphia Supermarket Leaders

- TGC Maintains Market Lead
- Solid Comps Aid ShopRite
- Lofland Heading Albertsons
- 3 New Units Bolster Aldi
- TJ's Comps Among The Best

		2023	2023 Sales	% of 2023	2022	2022 Sales	% of 2022
Rank	Company	Stores	(in millions)	Market	Stores	(in millions)	Market
1	The Giant Co. (Heirloom Market)	74	\$3,343.70	30.24%	72	\$3,111.71	30.00%
2	ShopRite (Fresh Grocer/PR)	57	\$3,029.50	27.40%	57	\$2,758.60	26.60%
3	Albertsons (Acme)	67	\$1,966.40	17.78%	67	\$1,931.10	18.62%
4	Wegmans	9	\$744.60	6.73%	9	\$697.30	6.72%
5	Aldi	53	\$497.20	4.50%	50	\$452.30	4.36%
6	Whole Foods (Amazon Fresh)	14	\$497.10	4.50%	13	\$456.70	4.40%
7	Redner's Markets	9	\$256.70	2.32%	10	\$269.30	2.60%
8	Trader Joe's	9	\$215.10	1.95%	8	\$180.10	1.74%
9	Weis Markets	9	\$190.40	1.72%	9	\$205.16	1.98%
10	Save A Lot	24	\$167.10	1.51%	24	\$157.00	1.51%
		325	\$10,907.80	98.64%	319	\$10,219.27	98.52%

The chart above lists the top 10 supermarket retailers in the Philadelphia market. Counties/cities included are: Bucks, Chester, Delaware, Montgomery and Philadelphia in PA; Burlington, Camden and Gloucester in NJ. Petroleum sales are not included. () Indicates another banner used by the company.

Total supermarket sales for the area are \$11.1 billion.

Source: *Food Trade News*, June 2023

Baltimore Supermarket Leaders

- Giant's Share Grows To 34.2%
- Safeway Comps Remain Strong
- Wegmans Is Per-Store Avg. Leader
- Weis Now Solidly In Third Place
- With 2 New Stores, Aldi At 29 Units

		2023	2023 Sales	% of 2023	2022	2022 Sales	% of 2022
Rank	Company	Stores	(in millions)	Market	Stores	(in millions)	Market
1	Giant Food	41	\$1,814.00	34.20%	40	\$1,682.95	34.16%
2	Albertsons (Acme/Safeway)	27	\$784.20	14.78%	27	\$756.60	14.68%
3	Weis Markets	25	\$534.63	10.08%	25	\$528.67	10.25%
4	Wegmans	5	\$471.20	8.88%	5	\$447.10	8.67%
5	ShopRite (Klein's/Village/PR)	11	\$377.22	7.11%	12	\$385.50	7.48%
6	International Markets	20	\$289.10	5.45%	20	\$274.90	5.33%
7	Harris Teeter	6	\$246.50	4.65%	6	\$231.30	4.49%
8	Food Lion	20	\$239.60	4.52%	20	\$231.20	4.48%
9	Aldi	29	\$223.00	4.20%	27	\$204.40	3.96%
10	Shoppers	8	\$218.70	4.12%	8	\$215.00	4.17%
		192	\$5,198.15	98.00%	190	\$4,957.62	97.98%

The chart above lists the top 10 supermarket retailers in the Baltimore market. Counties/cities included are: Anne Arundel, Baltimore City, Baltimore, Carroll, Harford, Howard and Queen Anne's. Petroleum sales are not included. () Indicates another banner used by the company.

Total supermarket sales for the area are \$5.3 billion.

Source: Food World, June 2023

Washington Supermarket Leaders

- Giant Ups DC Share To 29.5%
- Albertsons Sustains Comps Trend
- Wegmans Adds 2 New Locations
- Discounter Aldi Grows With 2 Units
- Amazon Fresh Skids To Mediocrity

		2023	2023 Sales	% of 2023	2022	2022 Sales	% of 2022
Rank	Company	Stores	(in millions)	Market	Stores	(in millions)	Market
1	Giant Food	114	\$4,264.80	29.46%	114	\$4,067.81	29.43%
2	Albertsons (Balducci's/Safeway)	87	\$2,309.50	15.95%	87	\$2,186.20	15.93%
3	International Markets	106	\$1,712.00	11.82%	106	\$1,634.90	12.26%
4	Harris Teeter	43	\$1,525.30	10.54%	43	\$1,449.30	10.86%
5	Wegmans	15	\$1,484.80	10.26%	12	\$1,154.10	8.65%
6	Whole Foods (Amazon Fresh)	31	\$1,084.10	7.49%	26	\$991.30	7.43%
7	Trader Joe's	19	\$560.40	3.87%	19	\$529.50	3.97%
8	Aldi	54	\$511.90	3.54%	52	\$476.90	3.57%
9	Food Lion	32	\$452.80	3.13%	32	\$430.90	3.23%
10	Shoppers	14	\$401.60	2.77%	12	\$351.50	2.63%
		515	\$14,307.20	98.82%	503	\$13,272.41	98.80%

This chart lists the top 10 supermarket retailers in the Washington market. Counties/cities included are: Washington, DC; Calvert, Charles, Frederick, Montgomery and Prince George's in MD; Arlington, Clarke, Culpeper, Fairfax, Fauquier, King George, Loudoun, Prince William, Spotsylvania, Stafford and Warren and the independent cities of Alexandria, Fairfax, Falls Church and Fredericksburg in VA. Petroleum sales are not included. () Indicates another banner used by the company. **Total supermarket sales for the area are \$14.48 billion.**

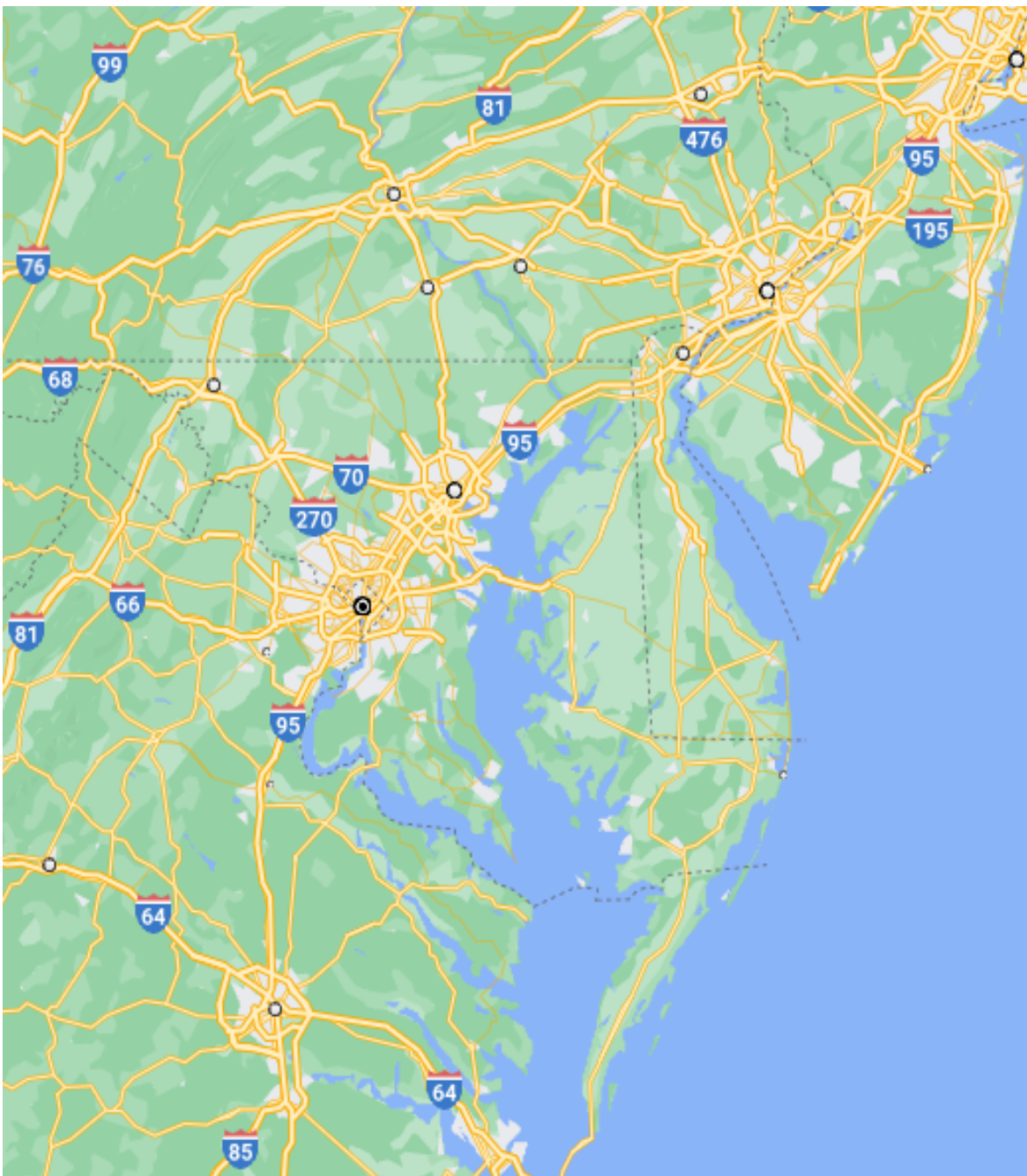
Source: Food World, June 2023

Results of July 12 Private-sector only Discussion

- The regional approach being teed-up is encouraging. A **regional approach is closer to how the real-world works**. But what is really needed is a “National Playbook”.
- Right now there are **too many public sector priorities and very different strategies**. If everything is a priority, nothing is a priority.
- **Food flows need more priority** in anticipation of and during the worst days, in terms of power restoration, road access, fuel access, and more. Right now there is usually no prioritization at all.
- No private sector player has the **bandwidth to interact with so many different public sector approaches** and jurisdictions.
- **Cities are a good place to start**. The bigger cities are more agile than the states or feds – and they tend to bring much more urgency to restoring private sector flows.
- The **states must eventually be involved and FEMA too**. The states too often get in the way. FEMA can help cultivate a shared nationwide approach.
- It would help to have a shared private-public understanding of **how and why decisions are made**. At least from the private sector side, the public sector is a black box. Perhaps the private sector can seem like a black box to the public sector. Especially on the worst days, there is a need to be able to communicate *and accurately anticipate* across sectors when communication is difficult or impossible.
- During emergencies there is a need for a **setting where operators can talk to operators** across the whole community (private-public and local, state, and federal) about how to coordinate and cooperate on trouble-shooting and problem-solving. None of the current calls do this.
- How can the private sector do a **better job of allocating food** if none of us have enough to fulfill demand?

Questions or Concerns:

philipjpalin@gmail.com



Mid-Atlantic Grocery Market Leaders

Major sources of Food-At-Home for Baltimore, Philadelphia, and Washington D.C. metro areas

These are regional market *estimates* for 2023 from Food World and Food Trade News

<https://www.foodtradenews.com/2023/06/27/food-trade-news-2023-market-study-issue/>

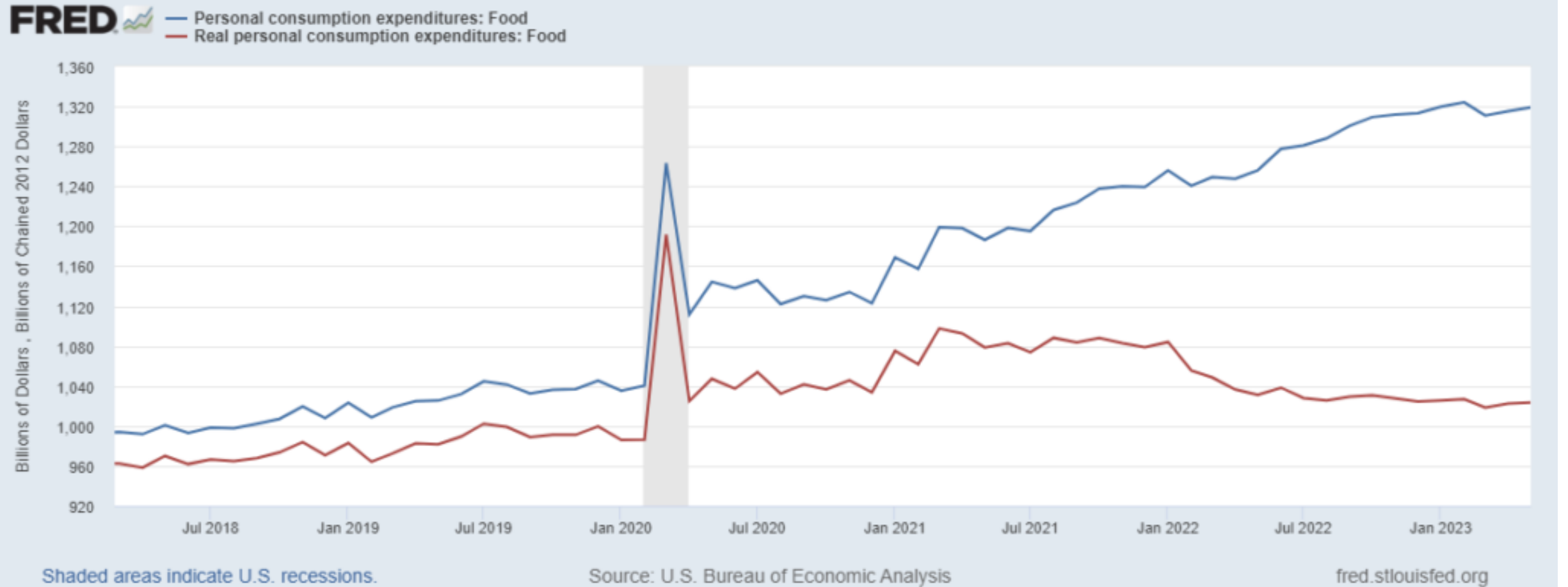
<https://www.foodtradenews.com/2023/06/20/food-world-2023-market-study-issue/>

National Comparisons Using a Different Method than Food World/Food Trade News

Rank	Company	Fiscal Year-End Sales (In Millions of Dollars U.S.)	Prior Year	% change	Store Count	Top Executives
1	Walmart U.S.	\$420,600	\$393,247	6.96%	5,317	John Furner, President and CEO
2	Amazon (online stores and physical stores segments only)	\$238,967	\$239,150	-0.08%	600	Andrew R. Jassy, CEO
3	Costco (U.S.)	\$165,294	\$141,398	16.90%	578	W. Craig Jelinek, President and CEO
4	The Kroger Co.	\$148,258	\$137,888	7.52%	2,719	Rodney McMullen, Chairman and CEO
5	Walgreens Boots Alliance (U.S retail)	\$132,703	\$132,509	0.15%	8,756	Rosalind Brewer, CEO
6	Target	\$109,120	\$106,005	2.94%	1,948	Brian Cornell, Chairman and CEO
7	CVS Health (retail segment)	\$106,594	\$100,105	6.48%	7,795	Karen Lynch, President and CEO
8	Sam's Club (U.S.)	\$84,345	\$73,556	14.67%	600	Kathryn McLay, President and CEO
9	Albertsons Cos.	\$77,600	\$71,887	7.95%	2,271	Vivek Sankaran, President and CEO
10	Ahold Delhaize USA	\$57,959	\$53,699	7.93%	2,051	J.J. Fleeman, CEO
11	Loblaw Cos. Ltd.	\$56,504	\$52,269	8.10%	2,742	Galen G. Weston, Chairman and President
12	Publix Super Markets	\$54,500	\$47,997	13.55%	1,334	Randall T. Jones Sr., CEO
13	Alimentation Couche-Tard (U.S. stores)	\$41,754	\$31,128	34.14%	5,714	Brian Hannasch, President and CEO
14	Walmart de Mexico y Centroamerica	\$40,496	\$35,964	12.60%	3,744	Guilherme Loureiro, President and CEO
15	H-E-B	\$38,900	\$34,000	14.41%	420	Charles Butt, Chairman and CEO
16	Dollar General	\$37,844	\$34,220	10.59%	19,104	Todd Vasos, Chairman and CEO
17	C&S Wholesale Grocers	\$34,700	\$33,022	5.08%	637	Bob Palmer, CEO
18	Costco (Canada)	\$31,675	\$27,298	16.03%	107	Pierre Riel, EVP/COO, Costco International
19	Empire Company Ltd. (Sobeys)	\$30,162	\$28,268	6.70%	1,600	Michael Medline, President and CEO
20	United Natural Foods Inc.	\$28,928	\$26,950	7.34%	73	Sandy Douglas, CEO
29	Wakefern Food Corp.	\$18,300	\$17,800	2.81%	362	Joe Colalillo, Chairman and CEO

79 more enterprises and further detail at <https://progressivegrocer.com/pg-100-biggest-players-grocery-retail>

National Indicators of Food Demand using the Federal Reserve's Personal Consumption Expenditures (PCE)



<https://fred.stlouisfed.org/series/DFXARX1M020SBEA>

Philadelphia Market Leaders

- Alternates Grab 42.2% Of Market
- Leader TGC Opens 2
- Drug Stores Continue To Close
- Wawa Has Stellar Year
- Target, WM Combine For 10.8%

Rank	Company	2023 Stores	2023 Sales (in millions)	% of 2023 Market	2022 Stores	2022 Sales (in millions)	% of 2022 Market
1	The Giant Co. (Heirloom Market)	74	\$3,343.70	15.77%	72	\$3,111.71	15.25%
2	ShopRite (Price Rite)	57	\$3,029.50	14.29%	57	\$2,758.60	13.52%
3	Wawa	312	\$2,277.05	10.74%	303	\$1,864.30	9.14%
4	Albertsons (Acme)	67	\$1,966.40	9.27%	67	\$1,931.10	9.46%
5	CVS	260	\$1,426.50	6.73%	259	\$1,359.90	6.66%
6	Walmart (SuperCenter)	40	\$1,369.70	6.46%	40	\$1,318.50	6.39%
7	Target	38	\$917.30	4.33%	37	\$848.10	4.16%
8	Rite Aid	193	\$755.50	3.56%	212	\$805.40	3.95%
9	Wegmans	9	\$744.60	3.51%	9	\$697.30	3.42%
10	BJ's Wholesale Club	13	\$566.70	2.67%	13	\$529.90	2.60%
11	Walgreens	71	\$500.00	2.36%	76	\$507.50	2.49%
12	Aldi	53	\$497.20	2.34%	50	\$452.30	2.22%
13	Whole Foods (Amazon Fresh)	14	\$497.10	2.34%	13	\$456.70	2.24%
14	7-Eleven	187	\$450.80	2.13%	185	\$421.80	2.07%
15	Costco	7	\$409.90	1.93%	7	\$383.90	1.88%
16	Sam's Club	6	\$268.80	1.27%	6	\$253.60	1.24%
17	Redner's Markets	9	\$256.70	1.21%	10	\$269.30	1.32%
18	Trader Joe's	9	\$215.10	1.01%	8	\$180.10	0.88%
19	Weis Markets	9	\$190.40	0.90%	9	\$205.16	1.01%
20	Save A Lot	24	\$167.10	0.79%	24	\$157.00	0.77%
		1,452	\$19,850.05	93.61%	1,457	\$18,512.17	93.51%

The chart above lists the top 20 retailers in the Philadelphia market that sell groceries, HBC, drugs, general merchandise and tobacco products. Volumes listed include 100% of store sales for supermarkets, convenience stores, and drug chains. Sales for club stores, Target and Wal-Mart are extrapolated to include comparable supermarket categories, as explained on page 154. Counties/cities included are: Bucks, Chester, Delaware, Montgomery and Philadelphia in PA; Burlington, Camden and Gloucester in NJ. Petroleum sales are not included. () Indicates another banner used by the company.

Total food sales for the area are: \$21.2 billion.

Source: Food Trade News, June 2023

Baltimore Market Leaders

- Alts. Share Grows To 37.2%
- Giant Extends Lead Over WM
- Mass. Share Is Now 11.1%
- 7-Eleven, Royal Farms, Wawa: 8.5%
- Club Share Also At 8.5%

Rank	Company	2023 Stores	2023 Sales (in millions)	% of 2023 Market	2022 Stores	2022 Sales (in millions)	% of 2022 Market
1	Giant Food	41	\$1,814.00	16.54%	40	\$1,682.95	16.19%
2	Walmart (SuperCenter)	22	\$829.50	7.56%	22	\$782.30	7.53%
3	Albertsons (Acme/Safeway)	27	\$784.20	7.15%	27	\$756.60	7.28%
4	Weis Markets	25	\$534.63	4.87%	25	\$528.67	5.09%
5	Walgreens	84	\$501.90	4.58%	84	\$480.20	4.62%
6	CVS	88	\$496.00	4.52%	88	\$478.50	4.60%
7	Wegmans	5	\$471.20	4.30%	5	\$447.10	4.30%
8	Target	19	\$383.70	3.50%	19	\$367.10	3.53%
9	ShopRite (Klein's/Village/PR)	11	\$377.22	3.44%	12	\$385.50	3.71%
10	7-Eleven	167	\$373.70	3.41%	163	\$325.30	3.13%
11	Royal Farm Stores	125	\$341.80	3.12%	124	\$316.70	3.05%
12	Costco	5	\$326.30	2.97%	5	\$304.10	2.93%
13	Sam's Club	6	\$321.80	2.93%	6	\$303.60	2.92%
14	BJ's Wholesale Club	7	\$290.60	2.65%	7	\$270.10	2.60%
15	International Markets	20	\$289.10	2.64%	20	\$274.90	2.64%
16	Harris Teeter	6	\$246.50	2.25%	6	\$231.30	2.22%
17	Food Lion	20	\$239.60	2.18%	20	\$231.20	2.22%
18	Aldi	29	\$223.00	2.03%	27	\$204.40	1.97%
19	Shoppers	8	\$218.70	1.99%	8	\$215.00	2.07%
20	Wawa	31	\$218.14	1.99%	29	\$161.60	1.55%
		746	\$9,281.59	84.61%	737	\$8,747.12	84.14%

This chart lists the top 20 retailers in the Baltimore market which sell groceries, HBC, drugs, general merchandise and tobacco products. Volumes listed include 100% of store sales for supermarkets, c-stores and drug chains. Sales for club stores, Target and Walmart are extrapolated to include comparable categories, as explained in the formula on page 87. Petroleum sales are not included. Counties/cities included are: Anne Arundel, Baltimore City, Baltimore, Carroll, Harford, Howard and Queen Anne's. () Indicates another banner used by the company. **Total food sales for the area are: \$10.97 billion.** Source: *Food World*, June 2023

Washington Market Leaders

- Alt. Channels Share Still At 32%
- Giant ACV Share Increases
- Drug Chains Keep Closing Units
- Target, Walmart Control 10.13%
- Costco, BJ's Buoyed By Inflation

Rank	Company	2023 Stores	2023 Sales (in millions)	% of 2023 Market	2022 Stores	2022 Sales (in millions)	% of 2022 Market
1	Giant Food	114	\$4,264.80	17.45%	114	\$4,067.81	17.41%
2	Albertsons (Balducci's/Safeway)	87	\$2,309.50	9.45%	87	\$2,186.20	9.40%
3	International Markets	106	\$1,712.00	7.00%	106	\$1,634.90	7.16%
4	CVS	256	\$1,621.30	6.63%	257	\$1,555.70	6.82%
5	Harris Teeter	43	\$1,525.30	6.24%	43	\$1,449.30	6.35%
6	Wegmans	15	\$1,484.80	6.07%	12	\$1,154.10	5.06%
7	Walmart (SuperCenter)	39	\$1,387.00	5.67%	40	\$1,344.00	5.59%
8	Costco	17	\$1,312.50	5.37%	17	\$1,217.00	5.33%
9	7-Eleven	490	\$1,127.80	4.61%	474	\$1,017.00	4.46%
10	Target (Super Target)	50	\$1,090.90	4.46%	49	\$1,015.90	4.45%
11	Whole Foods (Amazon Fresh)	31	\$1,084.10	4.43%	26	\$991.30	4.34%
12	Walgreens	94	\$594.90	2.43%	96	\$572.30	2.51%
13	Trader Joe's	19	\$560.40	2.29%	19	\$529.50	2.32%
14	Aldi	54	\$511.90	2.09%	52	\$476.90	2.09%
15	Food Lion	32	\$452.80	1.85%	32	\$430.90	1.89%
16	Shoppers	14	\$401.60	1.64%	12	\$351.50	1.54%
17	Weis Markets	24	\$379.46	1.55%	24	\$359.16	1.57%
18	BJ's Wholesale Club	9	\$363.80	1.49%	9	\$342.40	1.50%
19	Wawa	50	\$308.64	1.26%	48	\$341.40	1.50%
20	Lidl	29	\$271.20	1.11%	27	\$238.20	1.04%
		1,573	\$22,764.70	93.13%	1,544	\$21,275.00	93.09%

This chart lists top 20 retailers in the Washington market which sell groceries, HBC, drugs, GM, tobacco products. Volumes listed include 100% of store sales for supermarkets, c-stores and drug chains. Sales for club stores, Target and Walmart are extrapolated to include comparable categories, as explained in the formula on page 87. Petroleum sales are not included. Counties/cities included are: Washington, DC; Calvert, Charles, Frederick, Montgomery and Prince George's in MD; Arlington, Clarke, Culpeper, Fairfax, Fauquier, King George, Loudoun, Prince William, Spotsylvania, Stafford and Warren and the independent cities of Alexandria, Fairfax, Falls Church and Fredericksburg in VA. () Indicates another banner used by the company. **Total food sales for the area are: \$24.44 billion.** Source: Food World, June 2023