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Retailing & Wholesaling – Retail Trends

Updated: 7/23/2025

Contact: [Eliana Zeballos](#)

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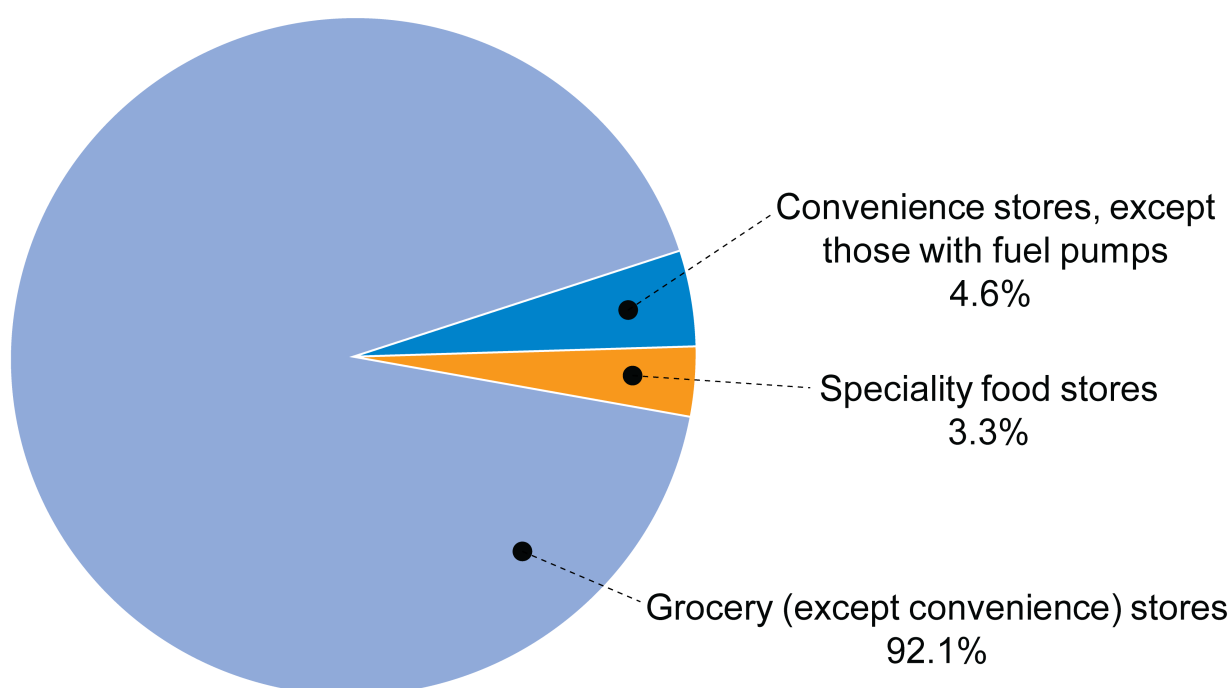
USDA, Economic Research Service (ERS) provides information on food store sales and sales growth as well as the share of food sales by retail segment and concentration.

Retail Food Sales and Sales Growth

The United States' 115,526 food stores sold \$717 billion of retail food and nonfood products in 2019. Grocery stores—including supermarkets and smaller grocery stores, except convenience stores—accounted for the largest share of store sales (92.1 percent), followed by convenience stores without gasoline (4.6 percent). Specialized food stores—including meat and seafood markets, produce markets, retail bakeries, and candy and nut stores—accounted for the remaining 3.3 percent of the total.

Food store sales by segment (percent), 2019

Retail food and nonfood products sales were \$717 billion in 2019



Source: USDA, Economic Research Service using data from U.S. Department of Commerce, Bureau of the Census, 2019 Annual Retail Trade Survey, North American Classification System (NAICS): 4451 and 4452.

Data as of May 2021.

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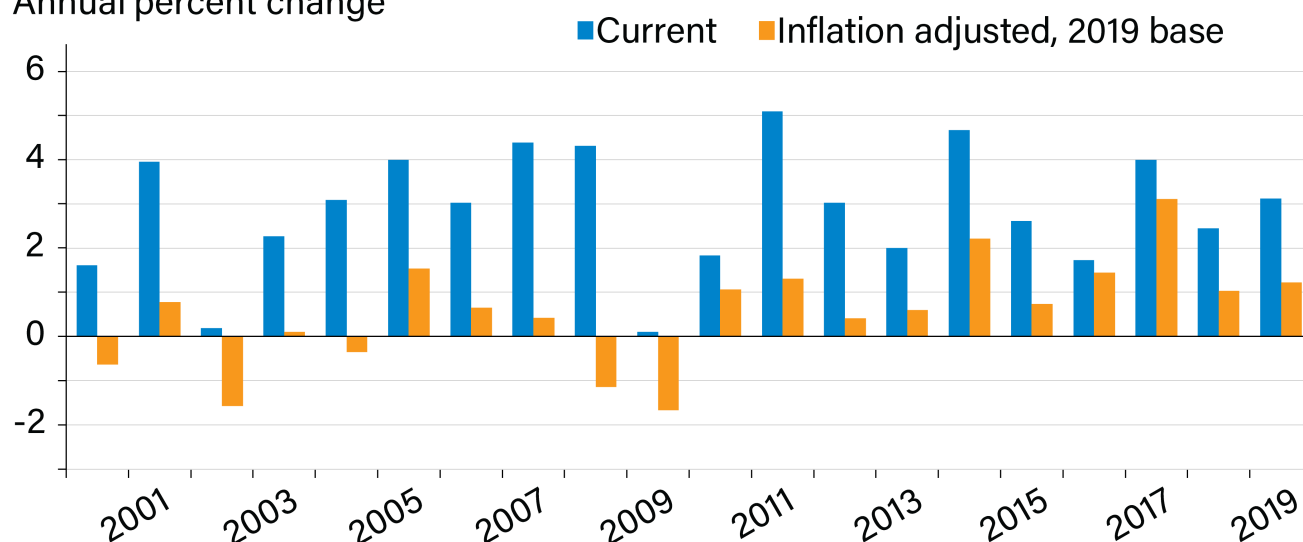
Grocery store (excluding convenience stores) food sales increased following the 2007–2009 Great Recession—a period of economic uncertainty in which

traditional grocery retailers experienced negative inflation-adjusted growth. Since 2010, grocery store food sales growth (in current dollars) exceeded the rate of inflation. Inflation-adjusted food sales growth from 2010 to 2019 averaged 1.31 percent per year, compared with -0.19 percent per year from 2000 to 2009.

Growth of sales at grocery stores (excluding convenience stores), 2000–19

While inflation-adjusted growth was negative during 2008–09, sales growth rebounded to positive levels in later years

Annual percent change



Sources: USDA, Economic Research Service using data from U.S. Department of Commerce, Bureau of the Census, 2019 Annual Retail Trade Survey; and U.S. Department of Labor, Bureau of Labor Statistics, Consumer Price Index for food, 2000–2019.

Data as of May 2021.

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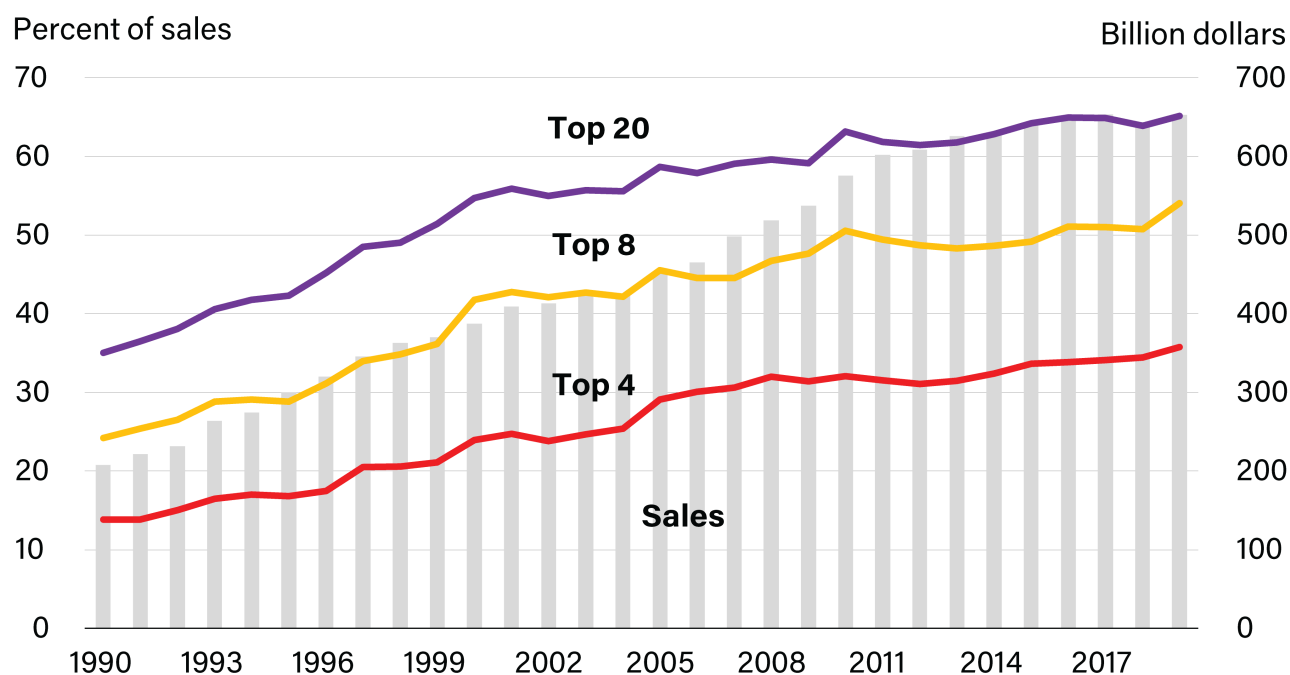
National Food Retail Concentration

Total U.S. food sales at supermarkets, other grocery (except convenience) stores, warehouse clubs, and supercenters reached \$653 billion in 2019 (gray

bars). At the national level, sales by the 20 largest food retailers totaled \$410.4 billion in 2019, accounting for 65.1 percent of total food sales (purple line). This share increased 85.9 percent from 1990 to 2019 (from 35.0 percent to 65.1 percent, respectively).

Top 4, 8, and 20 firms' share of U.S. food sales, 1990–2019

The share of food sales at supermarkets, other grocery stores, warehouse clubs, and supercenters of the top 4, 8, and 20 retailers trended upwards for the last three decades



Notes: Sales are estimated based on the sales per employee ratio calculated by firm size and North American Industry Classification System (NAICS) code. NAICS codes included: 445110 (supermarkets and other grocery (except convenience) stores) and 452311 (warehouse clubs and supercenters). Food sales are calculated using the Economic Census product lines statistics on the percentage of sales on food (on and off premises).

Source: USDA, Economic Research Service using data from U.S. Department of Commerce, Bureau of the Census, and National Establishment Time Series.

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Before and after the Great Recession of 2007–2009, market shares held by the largest 4, 8, and 20 retailers decreased slightly. Since 2012, the longer term trend of an increasing concentration of sales among the United States' largest retailers has resumed. This trend continued for the top 4 retailers, although the ratio for the top 20 and top 8 fell slightly in 2018, declining by 1.6 and 0.6 percent, respectively. The share of food sales at supermarkets, other grocery (except convenience) stores, warehouse clubs, and supercenters by the top 8 and top 20 retailers rose for 5 consecutive years

from 2012 to 2017. The share of food sales by the top 4 retailers rose every year since 2012.

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