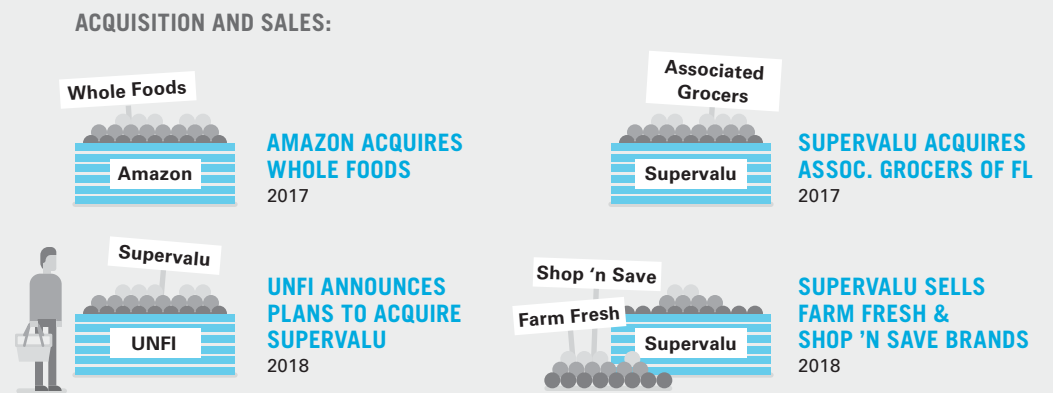
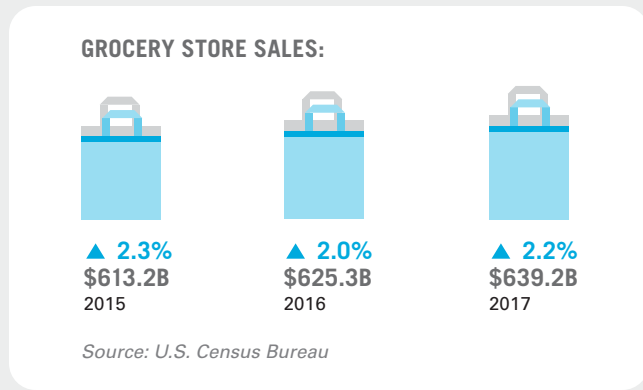
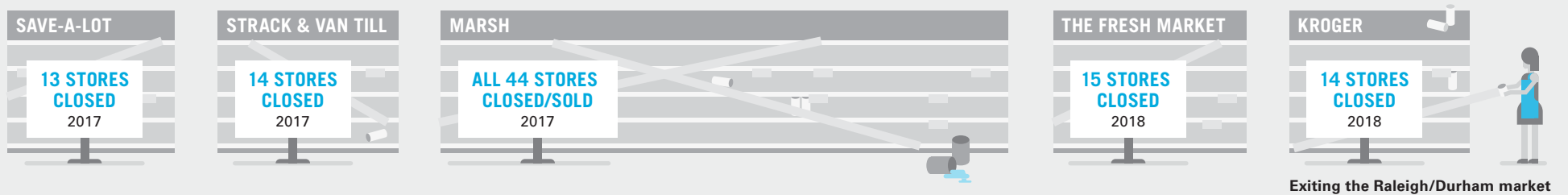


The industry continues a phase of significant consolidation and slow growth. While Amazon's purchase of Whole Foods stole headlines, "click-and-collect" continues to rise in popularity as shoppers leverage the convenience of the web and their local store.

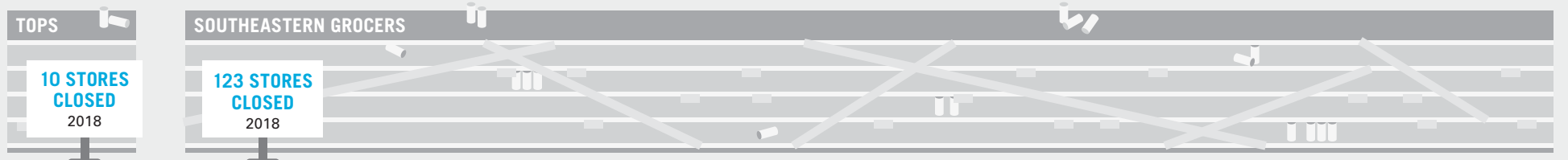
Source: JLL GroceryTracker



STORE CLOSURES:



BANKRUPTCIES:



CLICK-AND-COLLECT

Thirty percent of households now buy some of their groceries online by utilizing methods such as click-and-collect, home delivery, and third-party partnerships with Instacart, with click-and-collect being the most popular.

ONLINE GROWTH EXCEEDS IN-STORE SALES GROWTH



PRIME REAL ESTATE

Forty-eight percent of consumers have purchased groceries on Amazon, including Whole Foods products



18% MARKET SHARE OF ONLINE GROCERY SEGMENT
\$2 BILLION 2017
Twice that of Walmart

Source: One Click Retail

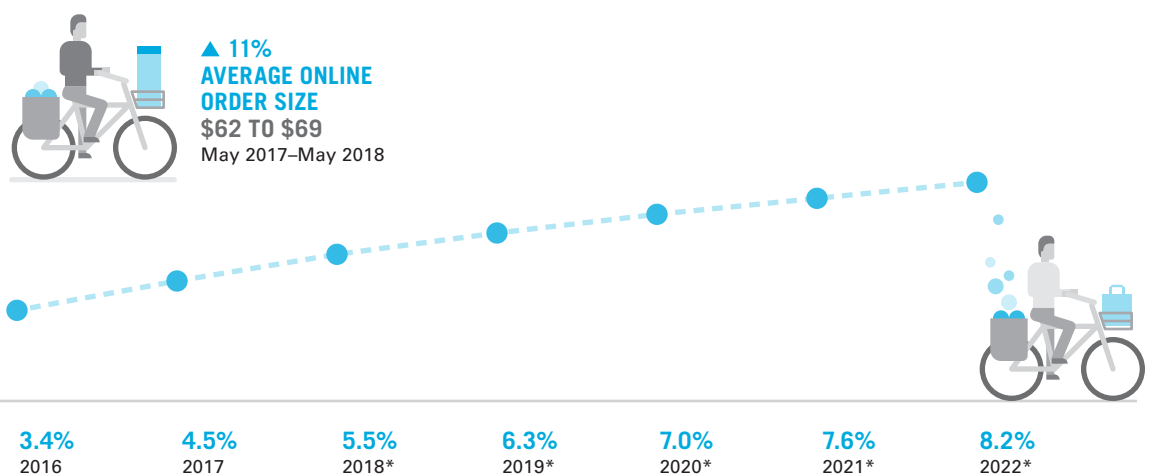


▲ **40% AMAZON.COM'S Q1 GROCERY SALES**
\$650 MILLION
Compared to last year



AVAILABLE IN 28 MARKETS PRIME NOW DELIVERY
Nationwide by year end

E-COMMERCE PERCENTAGE OF TOTAL GROCERY SPENDING



Including ship to home, store pickup, and services like Instacart.
* Projected

Source: Brick Meets Click

AN EXPRESS LANE OF CHANGE

Although industry sales are up, competition remains fierce. Traditional retailers are facing pressure from all sides, and consolidation continues to be the trend. Amazon's entrance into the market via its Whole Foods acquisition has prompted traditional players to invest more in omnichannel capabilities to keep pace. As a result, many are grappling with how to add key services profitably, such as click-and-collect and home delivery.

TO LEARN MORE, DOWNLOAD GA'S GROCERY MONITOR AT GREATAMERICAN.COM/MONITOR