



**PUBLICIS  
COMMERCE**

# **US Commerce Data Compendium**

January 2023





**2022 Retail**

**\$7.1T**

**+8.2% v 2021**

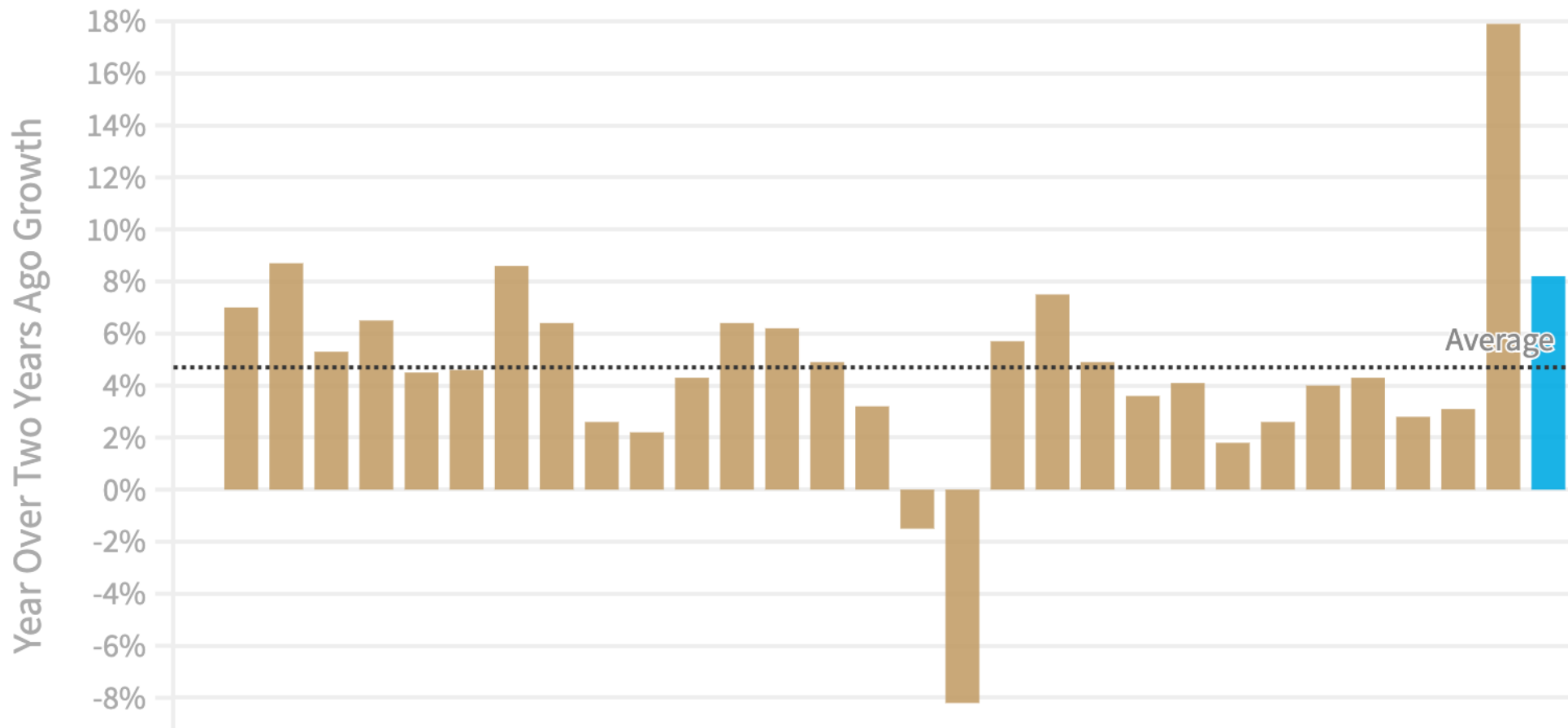
**+31% v 2019**



# Retail Growth

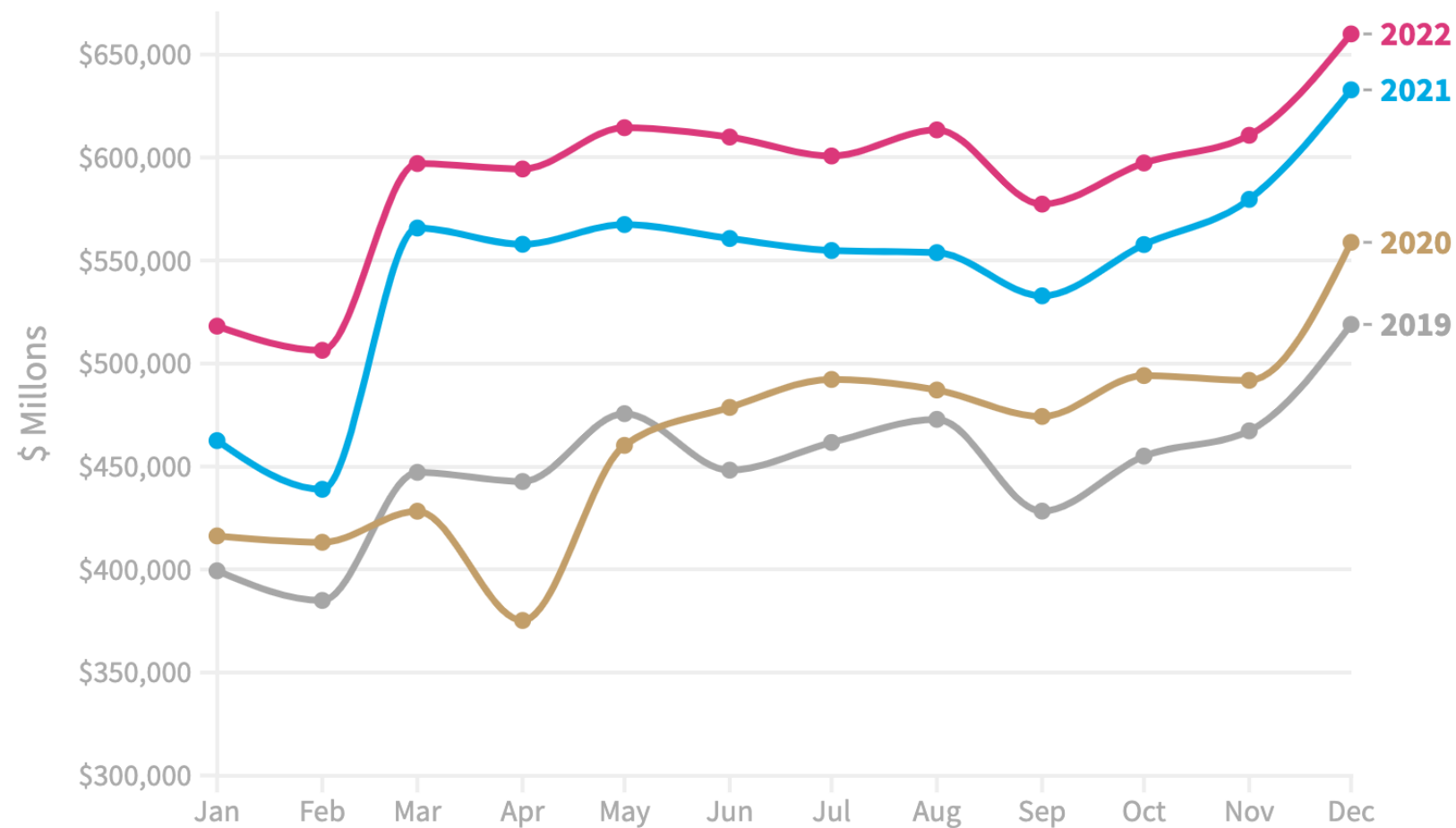
## Year over Year

Up 8.2% in 2022  
Up 17.9% in 2021  
Average growth 4.6%



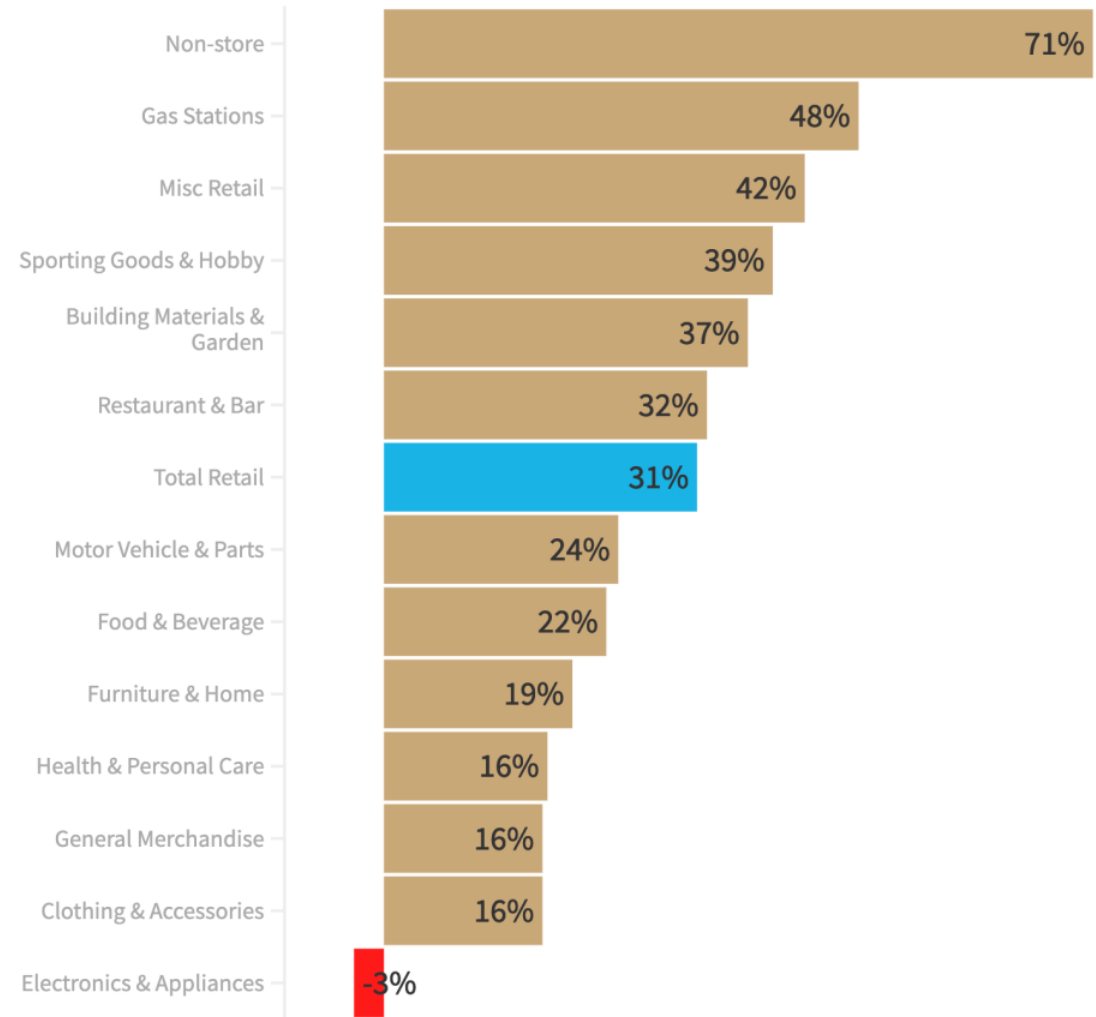
SOURCE: US Dept of Commerce, Economic Indicators Division, Retail Indicator Branch, Adv Monthly, NAISC 44000

# Monthly Retail Sales



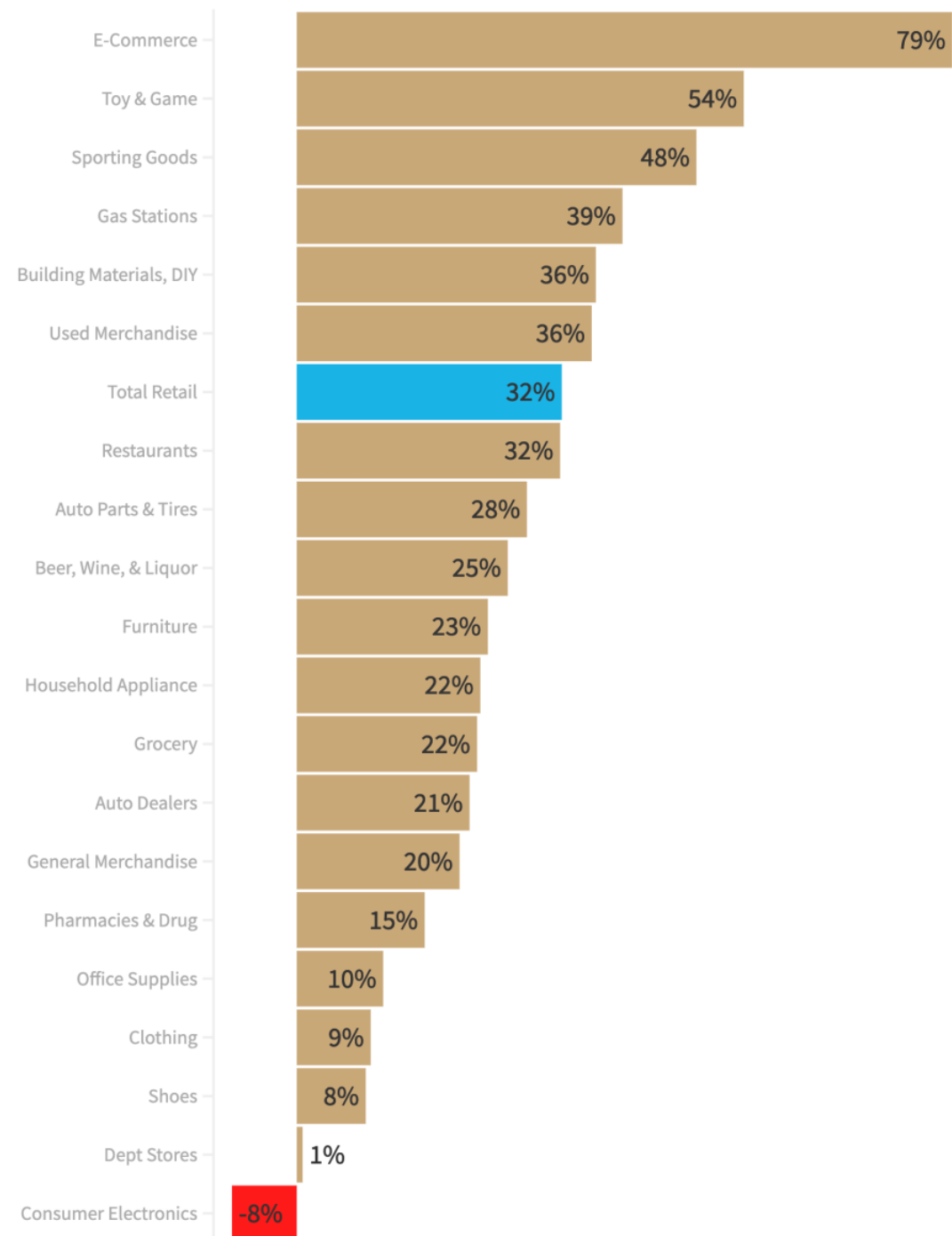
SOURCE: US Dept of Commerce, Economic Indicators Division, Retail Indicator Branch, Adv Monthly. Not Seasonally Adj. Cat 44000

# 2022 Sales vs 2019



SOURCE: US Dept of Commerce, Economic Indicators Division, Retail Indicator Branch, Adv Monthly, Not Seasonally Adj.

# Detailed Categories Jan-Nov 2022 vs 2019



SOURCE: US Dept of Commerce, Economic Indicators Division, Retail Indicator Branch, Adv Monthly, Not Seasonally Adj.

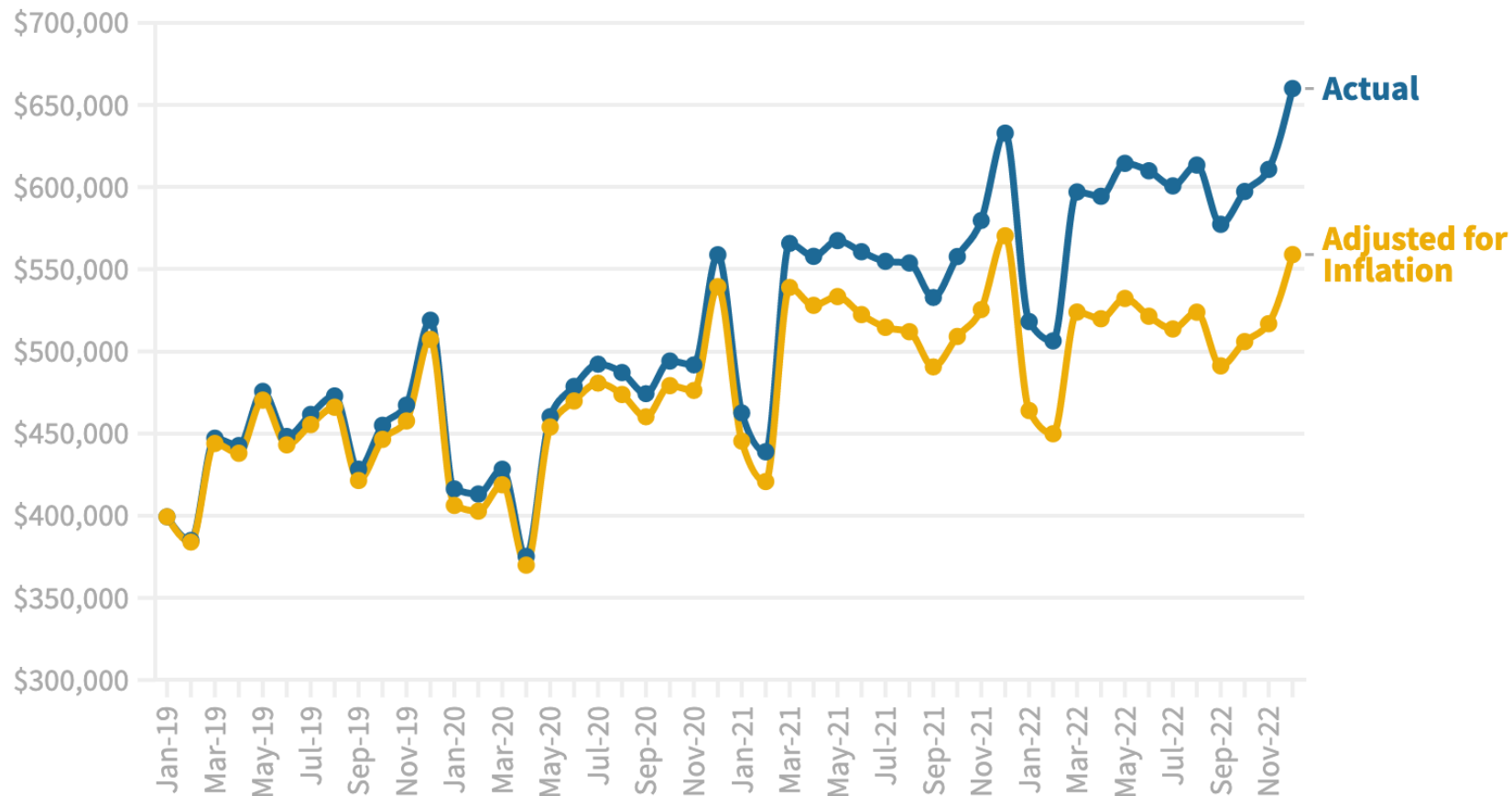
# Inflation (December 2022)

6.5%

2.3% Dec 2019

# US 2022 Retail Sales Adjusted for inflation

Up 8.2% (0.2% adjusted) YoY  
Up 31.4% (14.8% adjusted) Yo3Y



SOURCE: US Dept of Commerce, Economic Indicators Division, Retail Indicator Branch, U.S. Bureau of Labor Statistics, Publicis Analysis



# Automobile – 2022

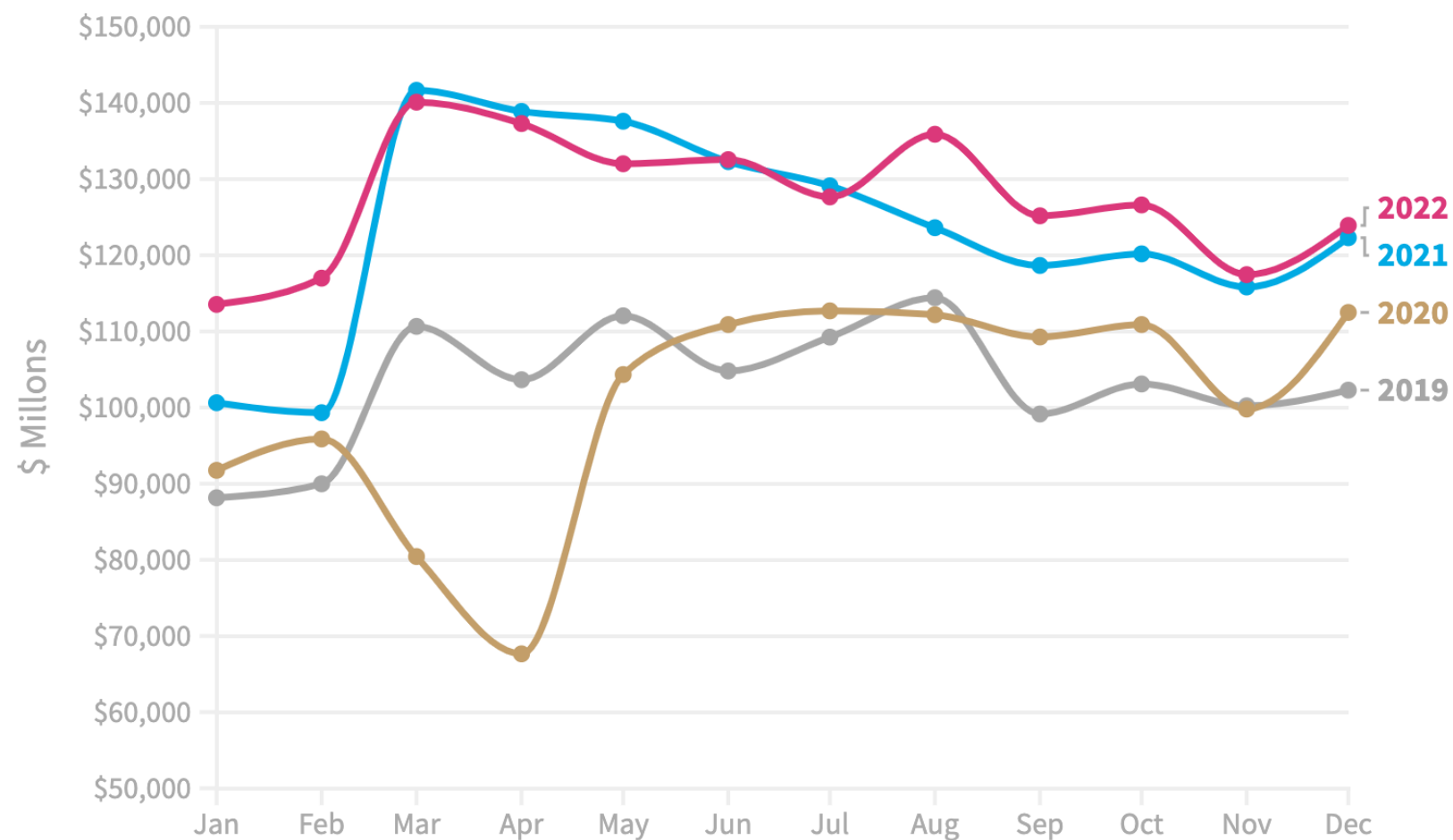
# \$1.5T

+3.3% v 2021

+24% v 2019


22% of Retail

# Monthly Auto Sales



SOURCE: US Dept of Commerce, Economic Indicators Division, Retail Indicator Branch, Adv Monthly, Not Seasonally Adj. Cat 441



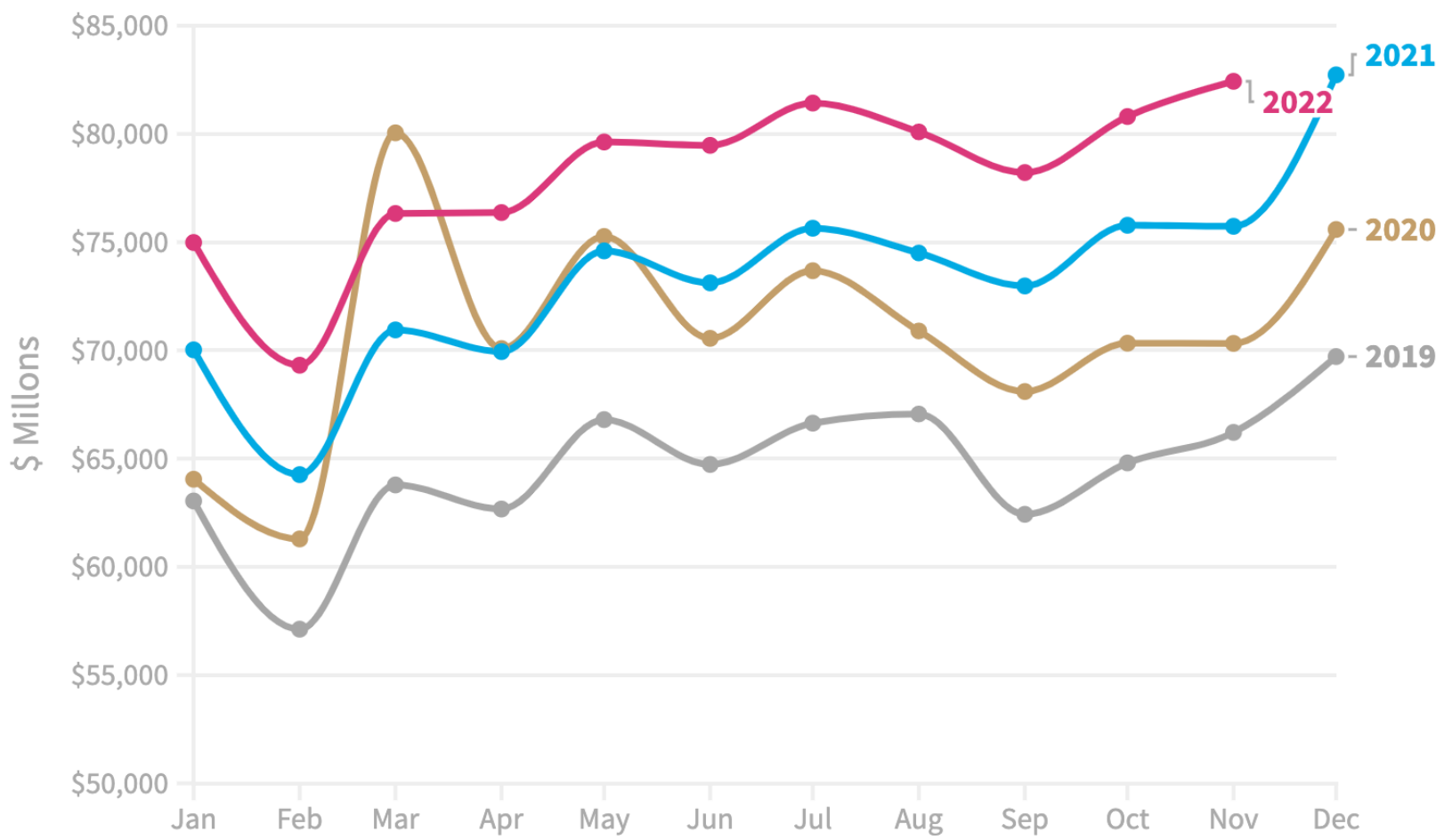


Grocery – 2022

\$948B

+7.6% v 2021  
+22.3% v 2019  
13% of Retail

# Monthly Grocery Sales

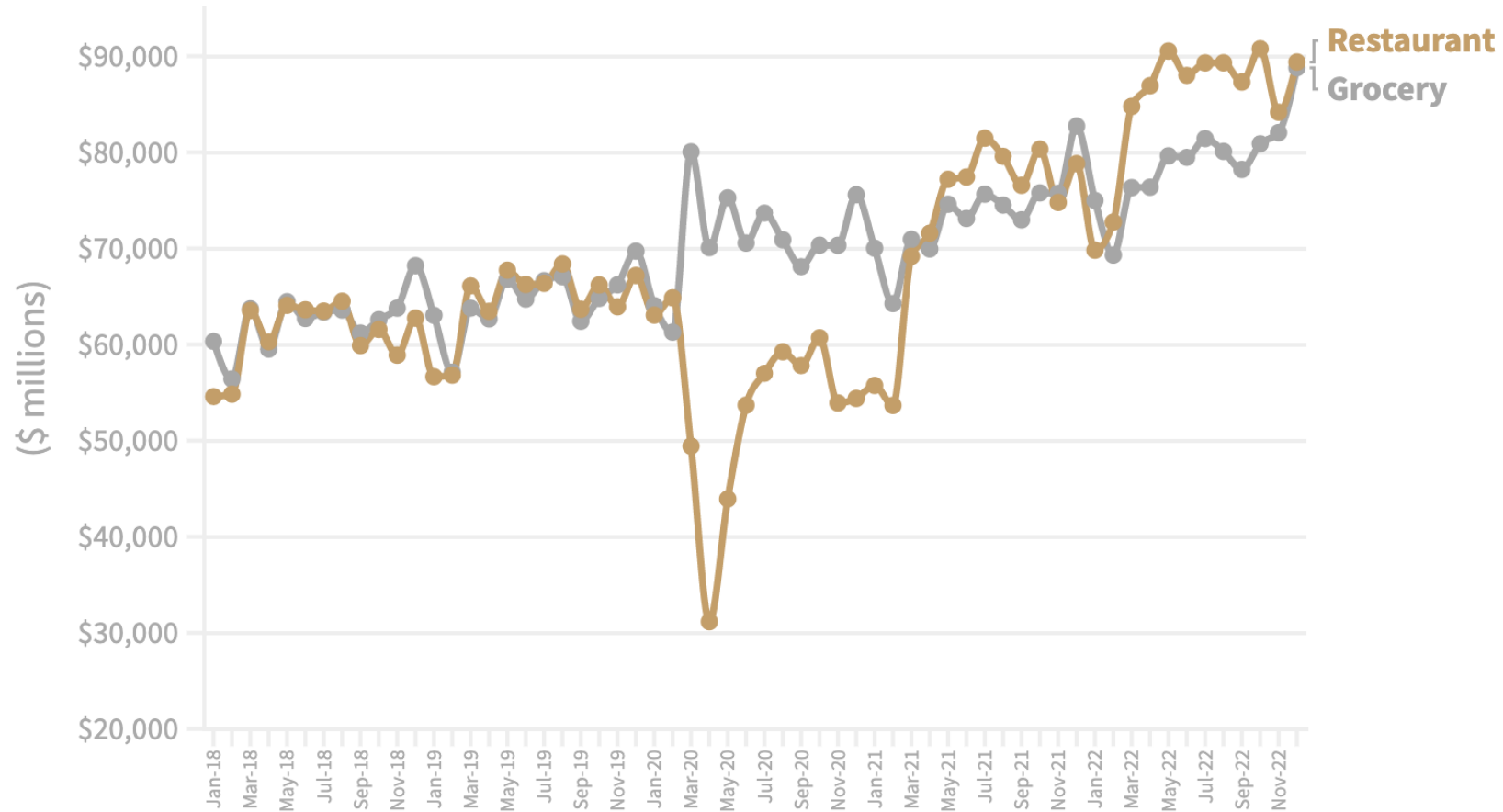


SOURCE: US Dept of Commerce, Economic Indicators Division, Retail Indicator Branch, Adv Monthly, Not Seasonally Adj. Cat 445





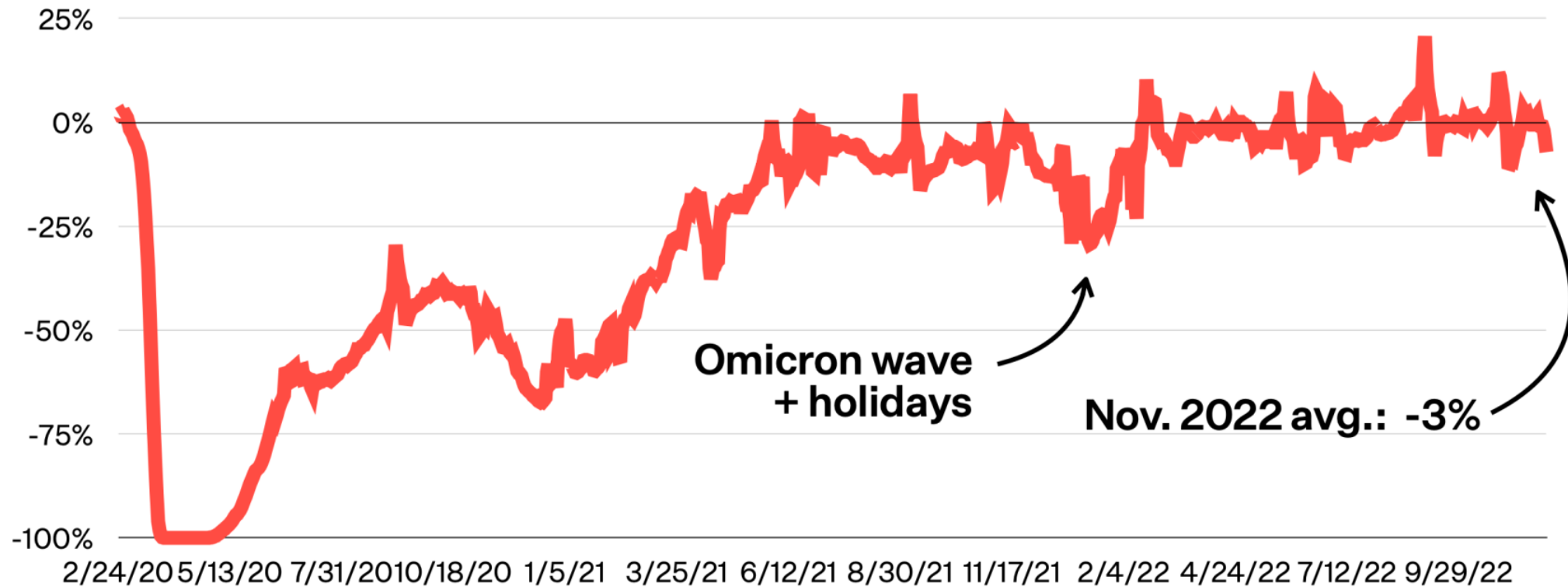
# Restaurant vs Grocery



SOURCE: US Dept of Commerce, Economic Indicators Division, Retail Indicator Branch, Adv Monthly, Not Seasonally Adj. Cat 445 vs. 772

# Restaurants Back to Normal

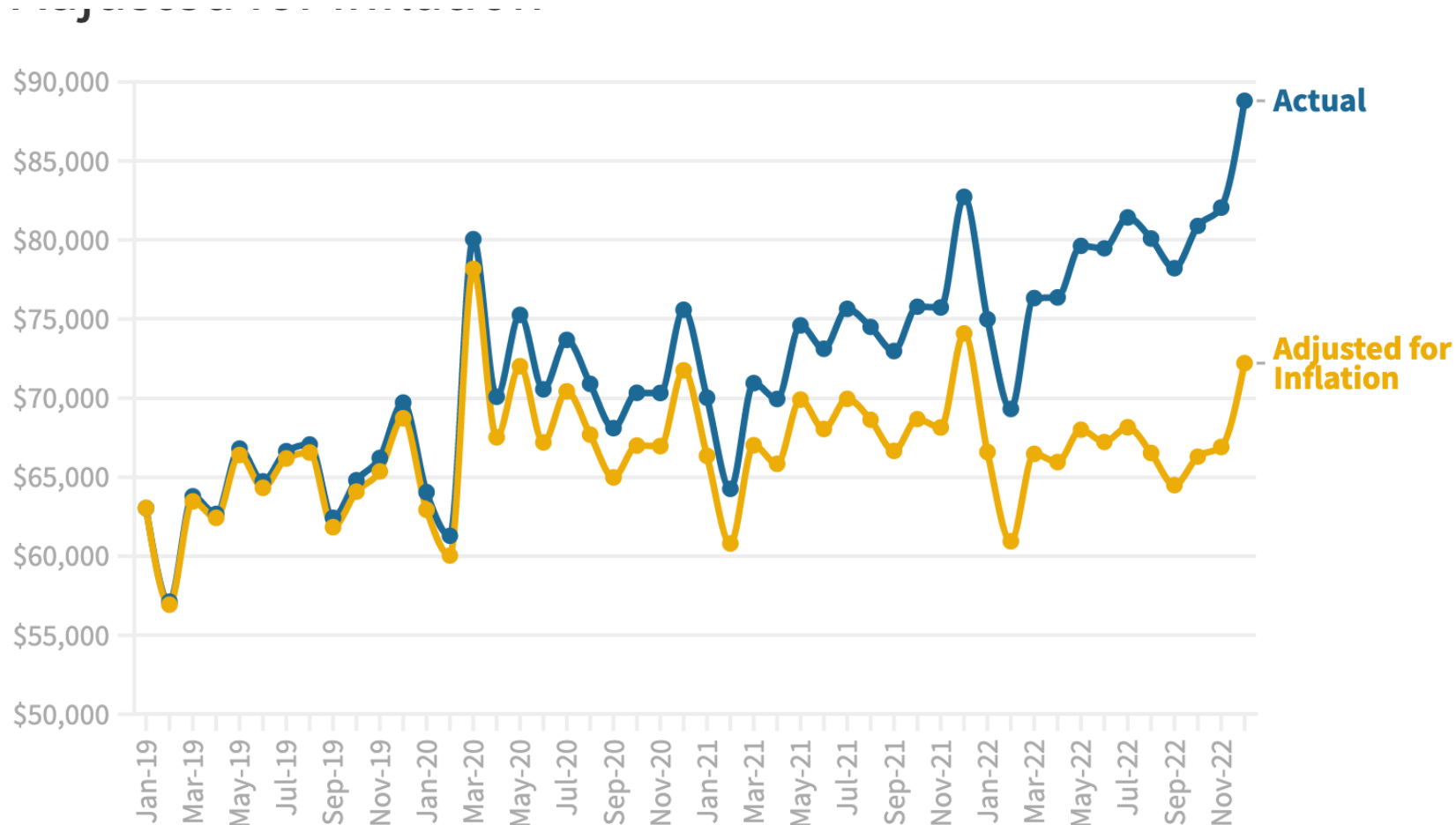
OpenTable seated diners change vs. 2019 'normal'



SOURCE: OpenTable. 7-day average, same weekday via The New Consumer

# US Grocery Sales Adjusted for inflation

Up 7.6% (-1.8% adjusted) YoY  
Up 22.3% (4.0% adjusted) Yo3Y



SOURCE: US Dept of Commerce, Economic Indicators Division, Retail Indicator Branch, U.S. Bureau of Labor Statistics, Publicis Analysis



Apparel – 2022

**\$312B**

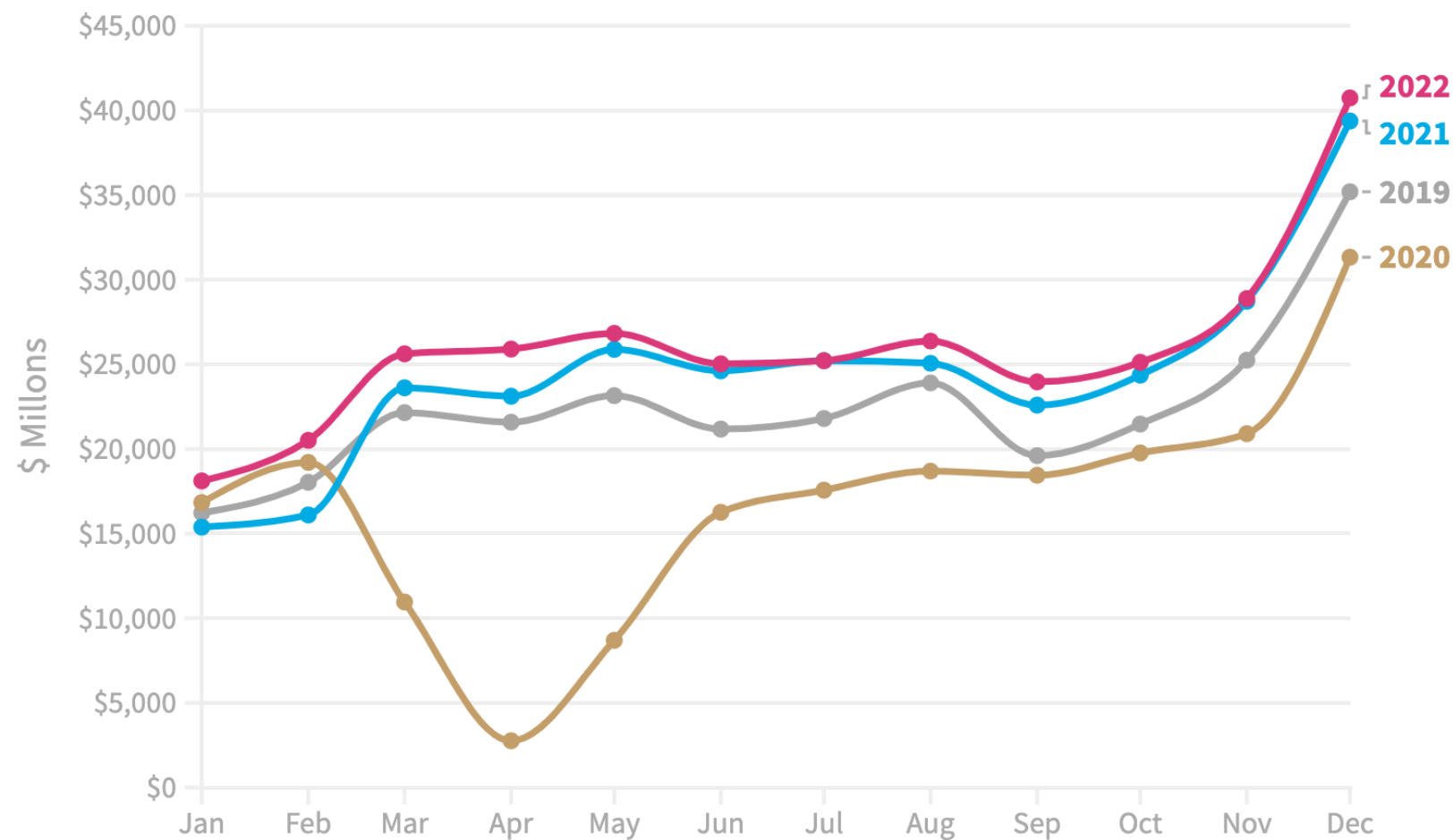
+6.2% v 2021

+16% v 2019

4% of Retail

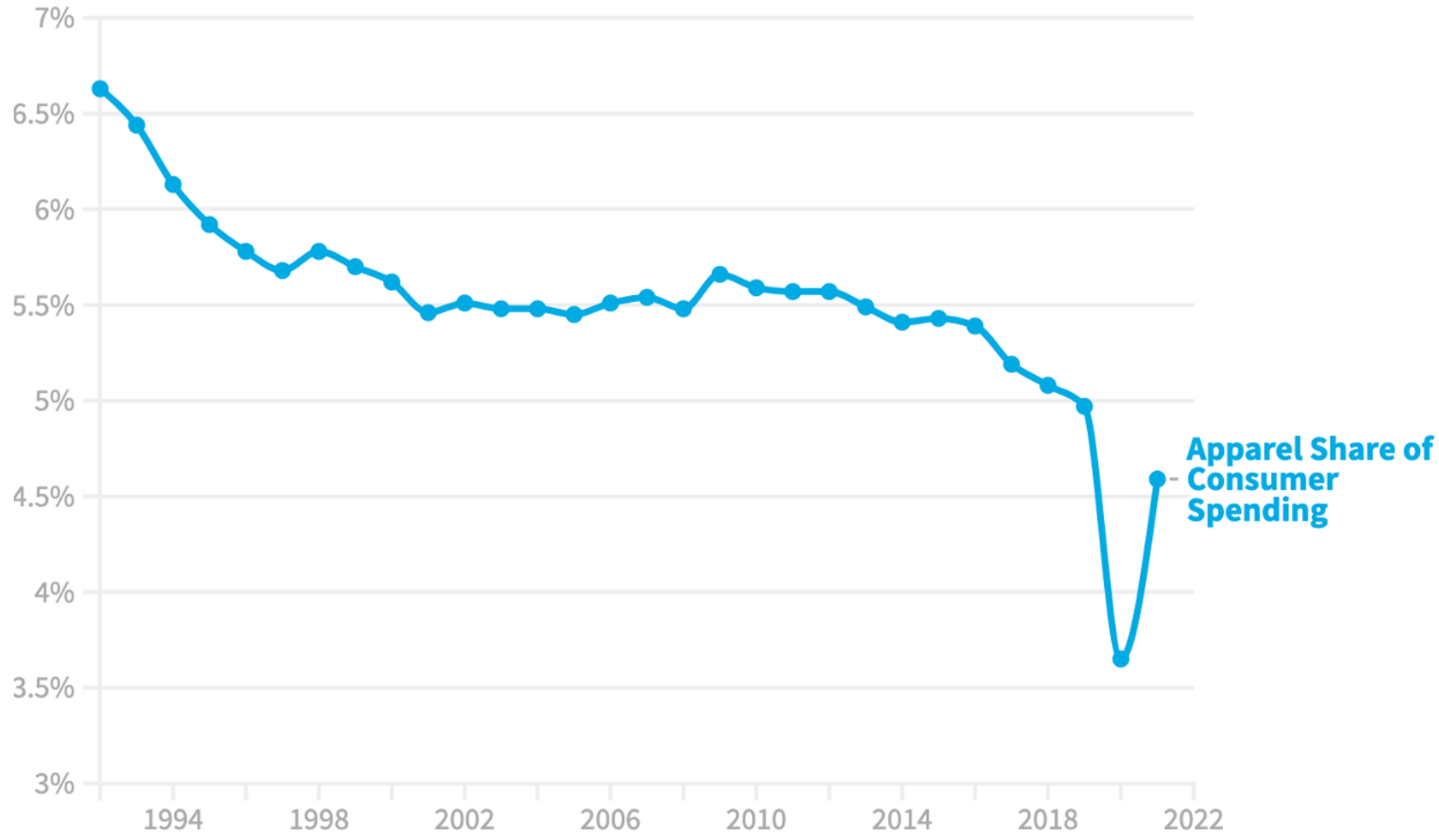


# Monthly US Apparel Sales



SOURCE: US Dept of Commerce, Economic Indicators Division, Retail Indicator Branch, Adv Monthly, Not Seasonally Adj. Cat 448

# Apparel Share of Consumer Spending



SOURCE: US Dept of Commerce, Economic Indicators Division, Retail Indicator Branch, Adv Monthly, Not Seasonally Adj. Cat 448/44000



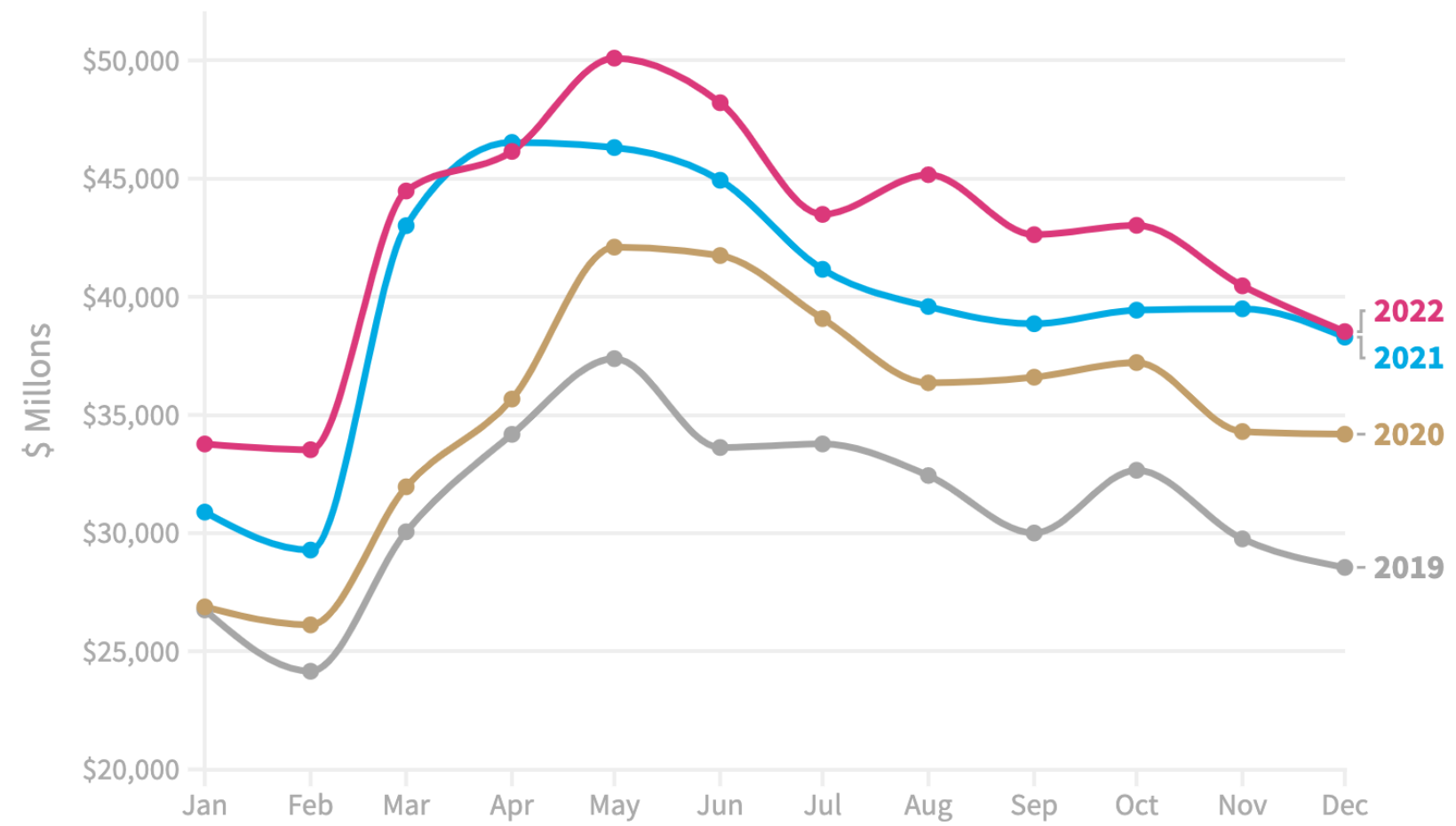
DIY / Home Improvement – 2022 Jan-Nov

**\$472B**

+6.6% v 2021

+37% v 2019

# Monthly DIY / Home Improvement Sales



SOURCE: US Dept of Commerce, Economic Indicators Division, Retail Indicator Branch, Adv Monthly, Not Seasonally Adj. Cat 444





# Electronics – 2022

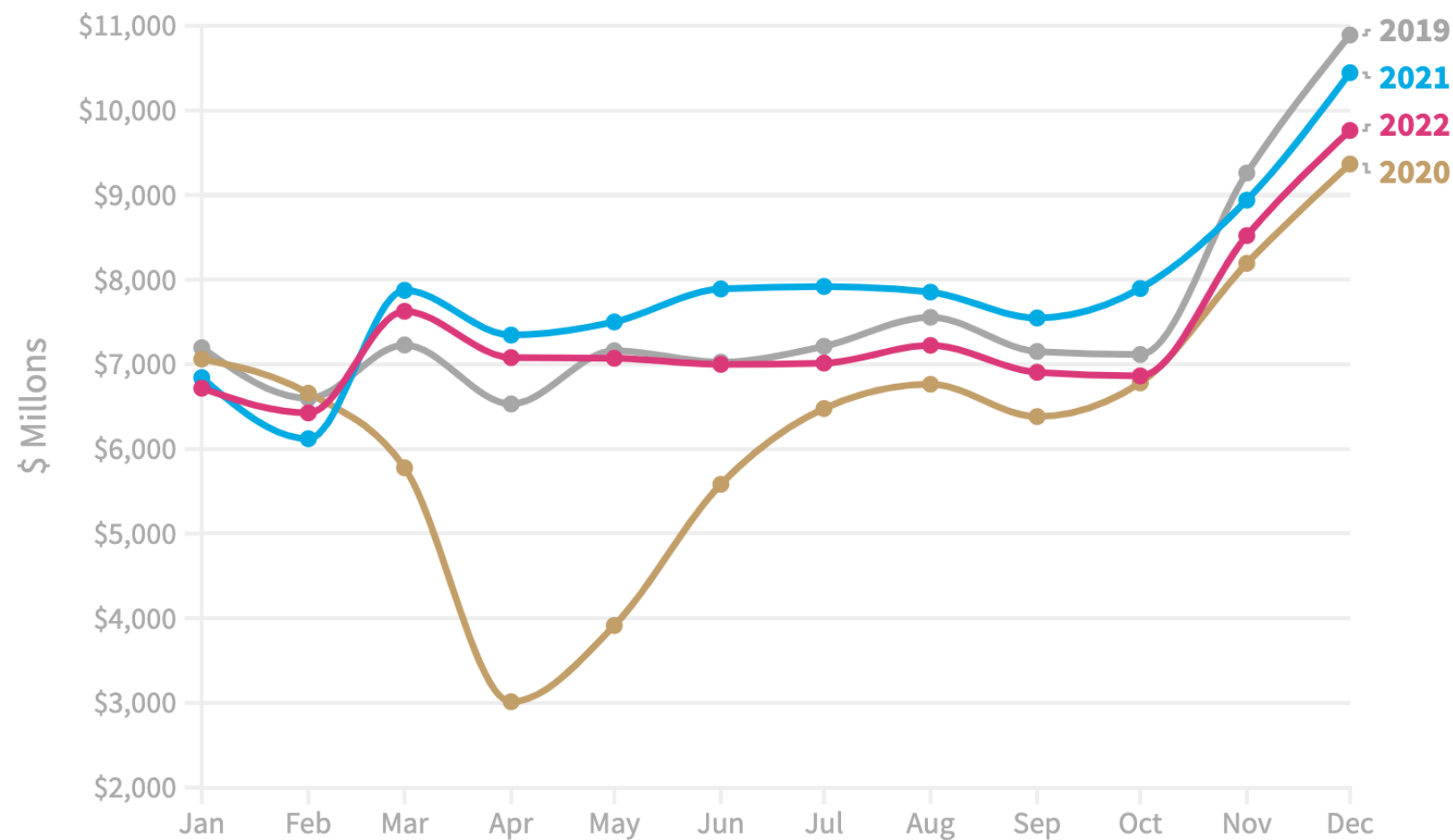
\$88B

-6.3% v 2021

-3% v 2019

1.2% of Retail

# Monthly US Electronics Sales



SOURCE: US Dept of Commerce, Economic Indicators Division, Retail Indicator Branch, Adv Monthly, Not Seasonally Adj. Cat 443



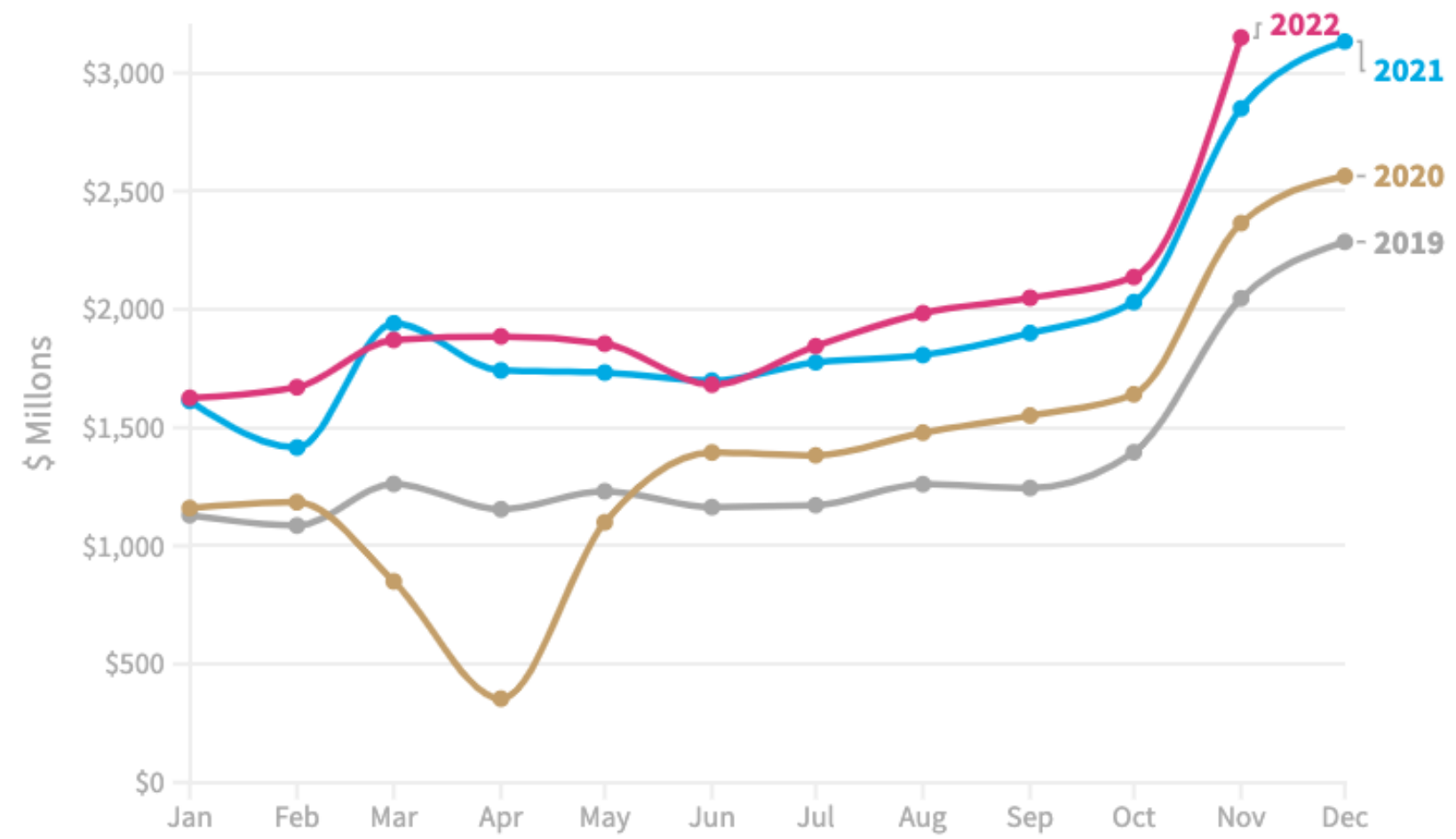
# Toys – 2022 Jan-Nov

\$22B

+6.1% v 2021

+54% v 2019

# Monthly US Toy Sales



SOURCE: US Dept of Commerce, Economic Indicators Division, Retail Indicator Branch, Monthly, Not Seasonally Adj. Cat 45112



# E-Commerce 2022 Jan-Sept

**\$735B**

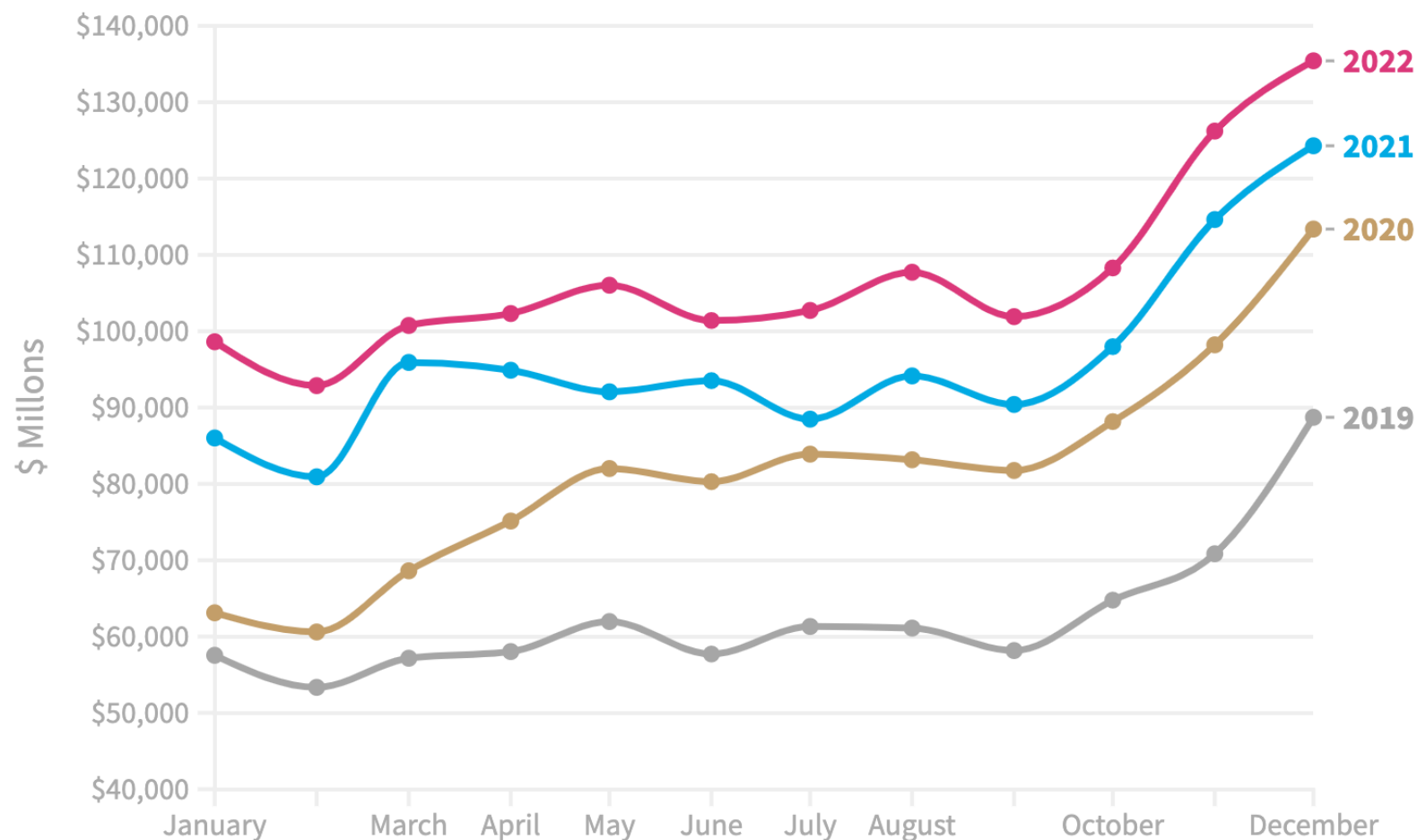
**14% of US Retail**

**+8% v 2021**

**+32% v 2020**

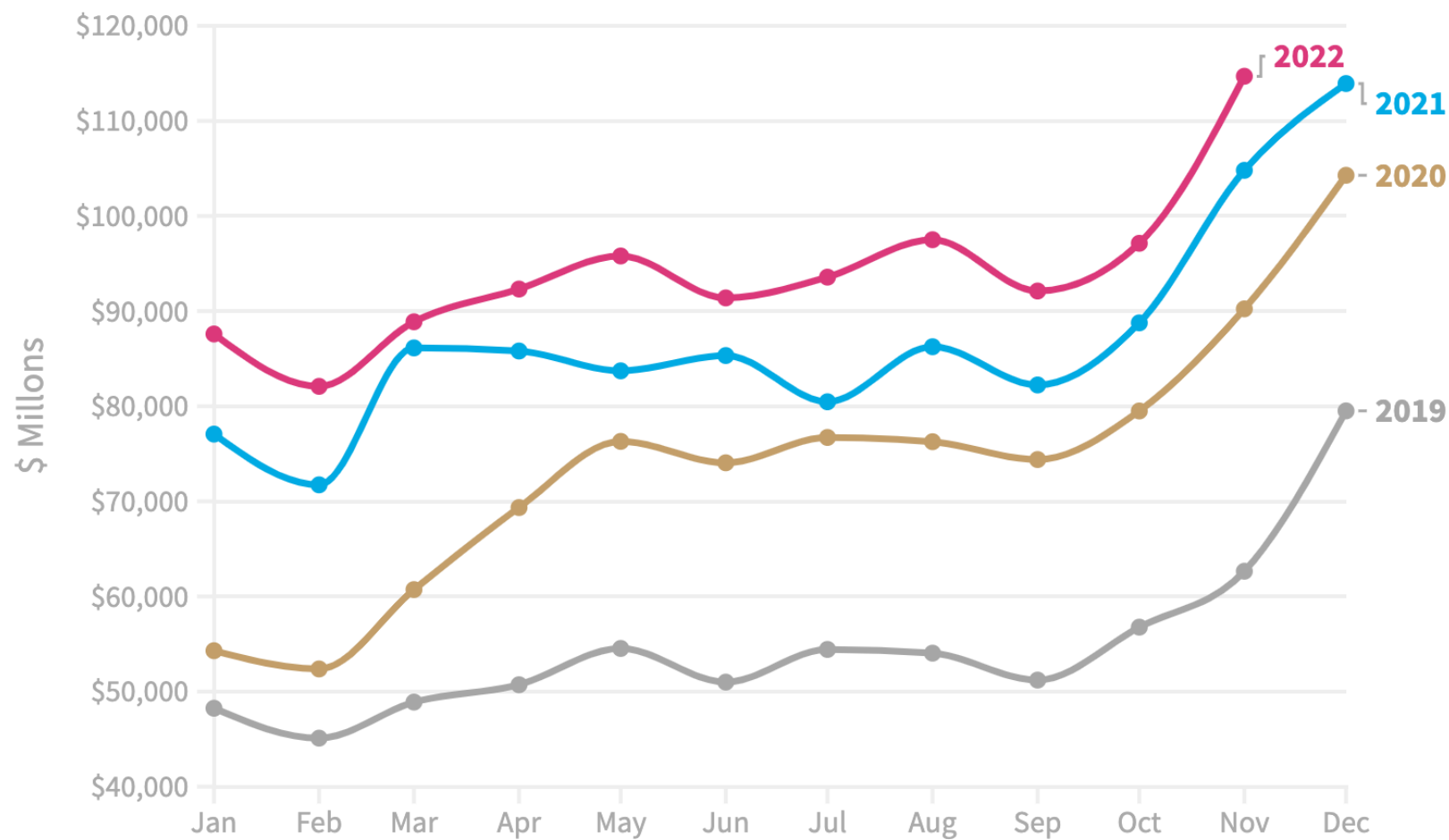
**+87% v 2019**

# Non-Store Sales (E-Com & Catalog)



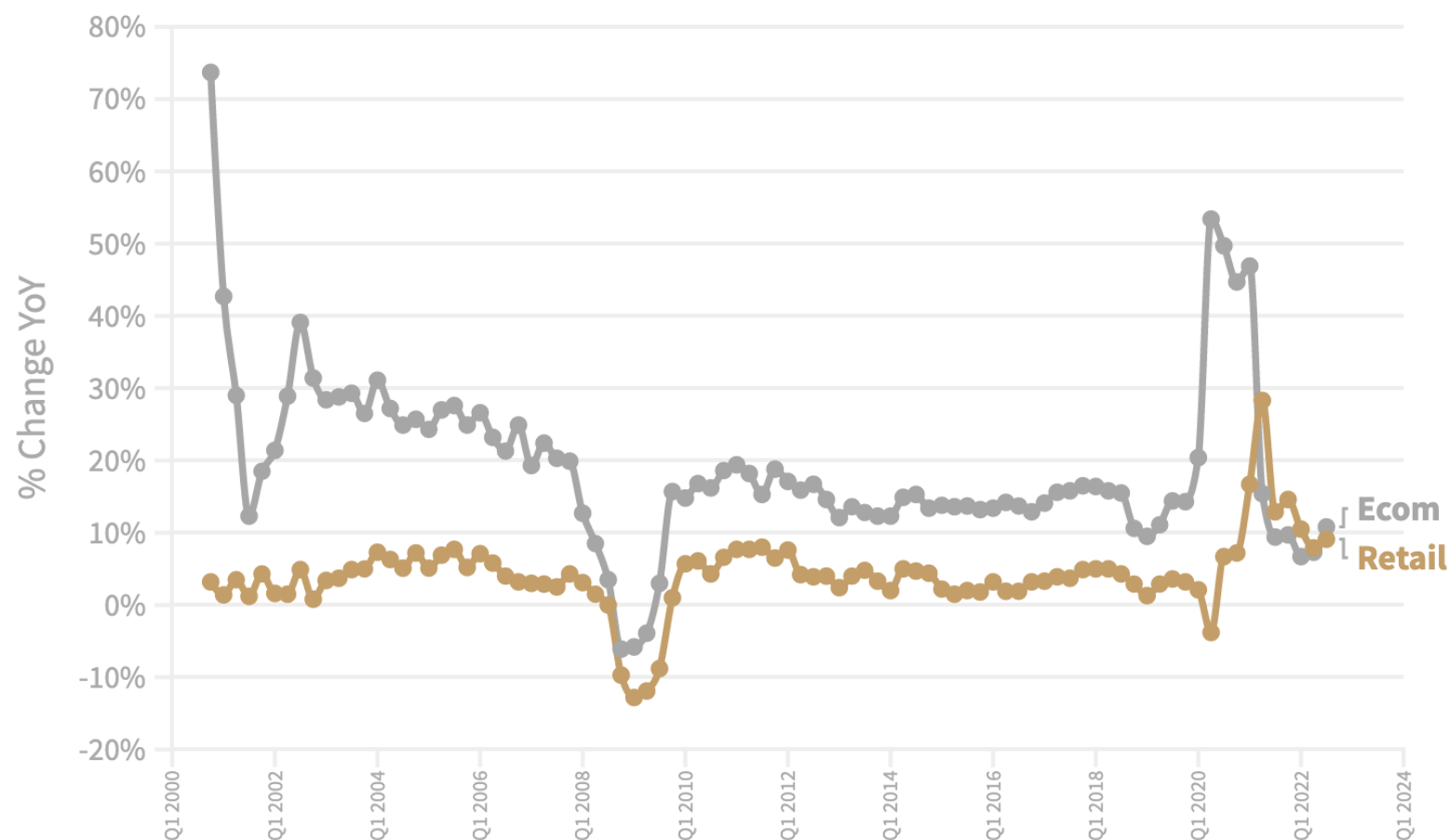
SOURCE: US Dept of Commerce, Economic Indicators Division, Retail Indicator Branch, Adv Monthly, Not Seasonally Adj. Cat 454

# E-Commerce (MRTS)



SOURCE: US Dept of Commerce, Economic Indicators Division, Retail Indicator Branch, Monthly, Not Seasonally Adj. Cat 4541

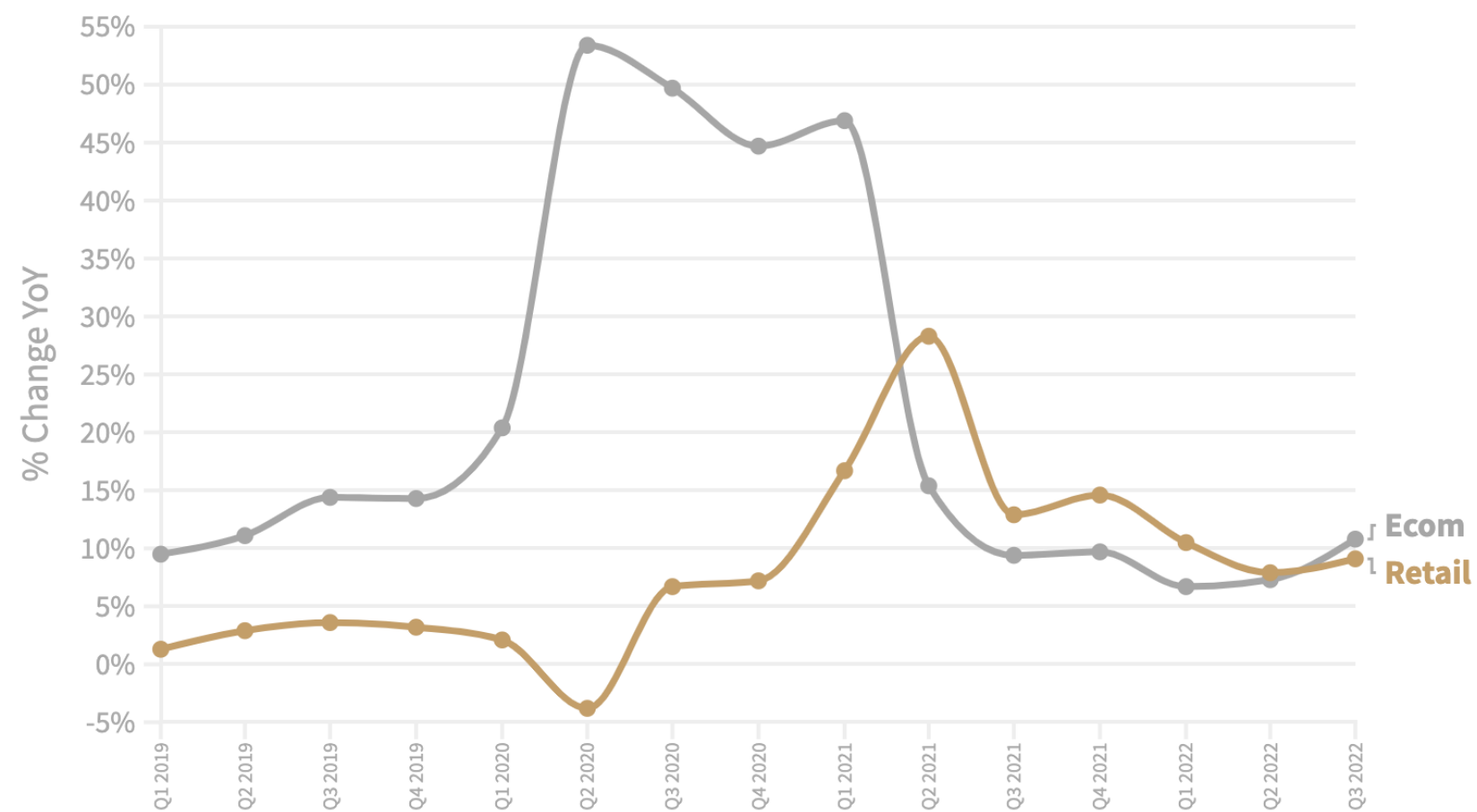
# E-Commerce vs Retail YoY Growth



SOURCE: US Dept of Commerce, Economic Indicators Division, Retail Indicator Branch, Monthly, Not Seasonally Adj. Cat 4541 v 44000

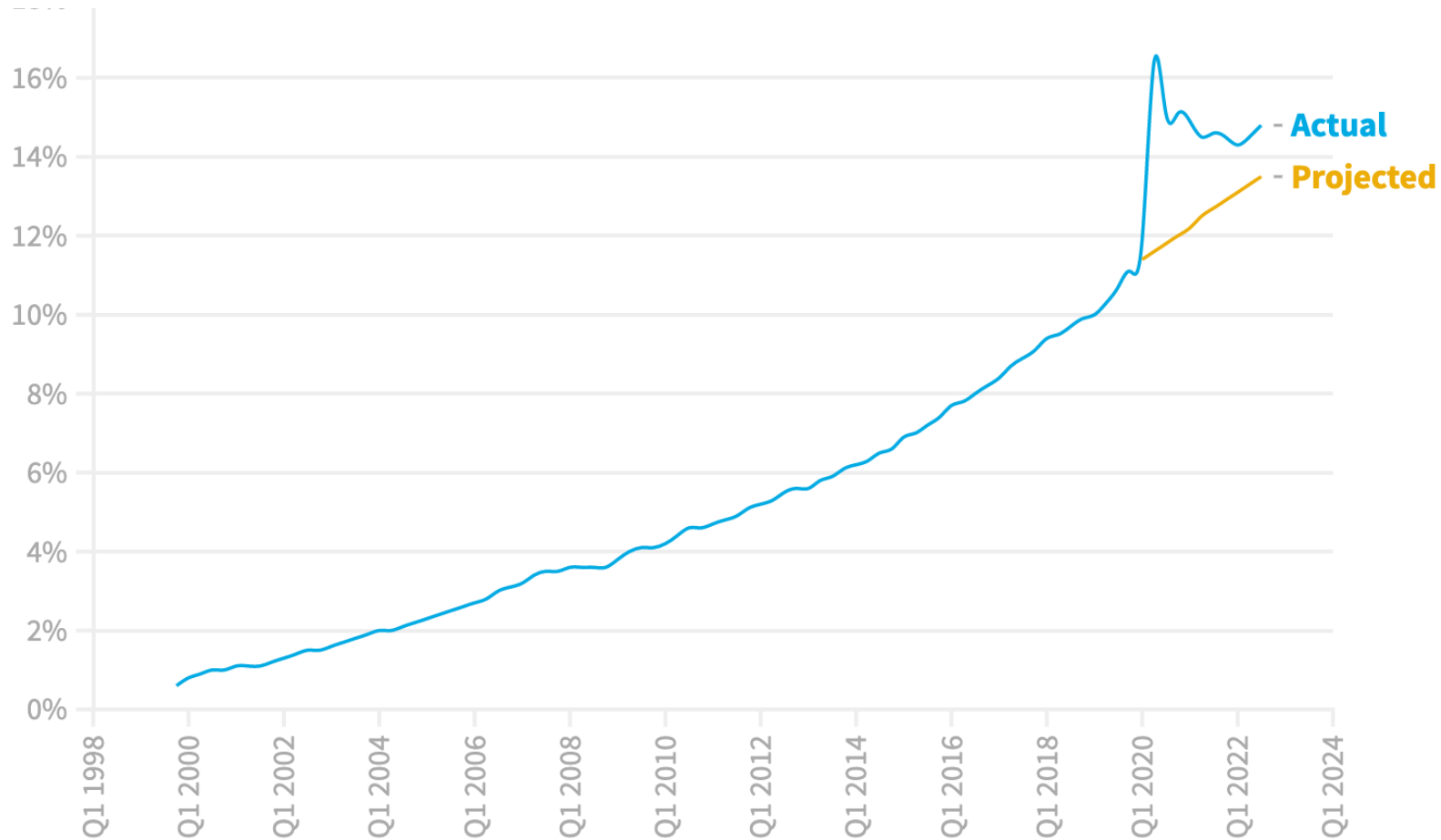


# E-Commerce vs Retail YoY Growth



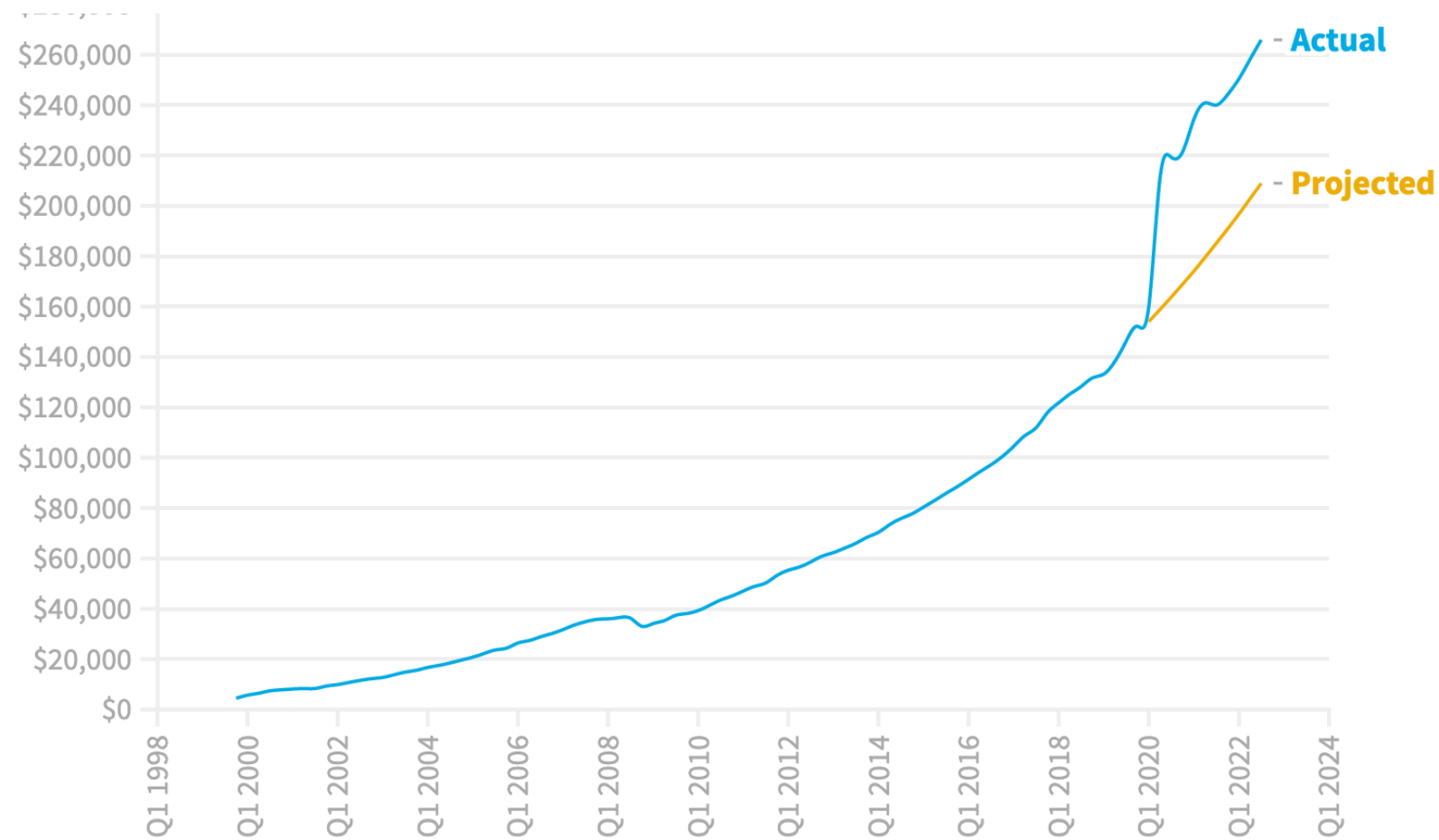
SOURCE: US Dept of Commerce, Economic Indicators Division, Retail Indicator Branch, Monthly, Not Seasonally Adj. Cat 4541 v 44000

# E-Commerce Share of Retail



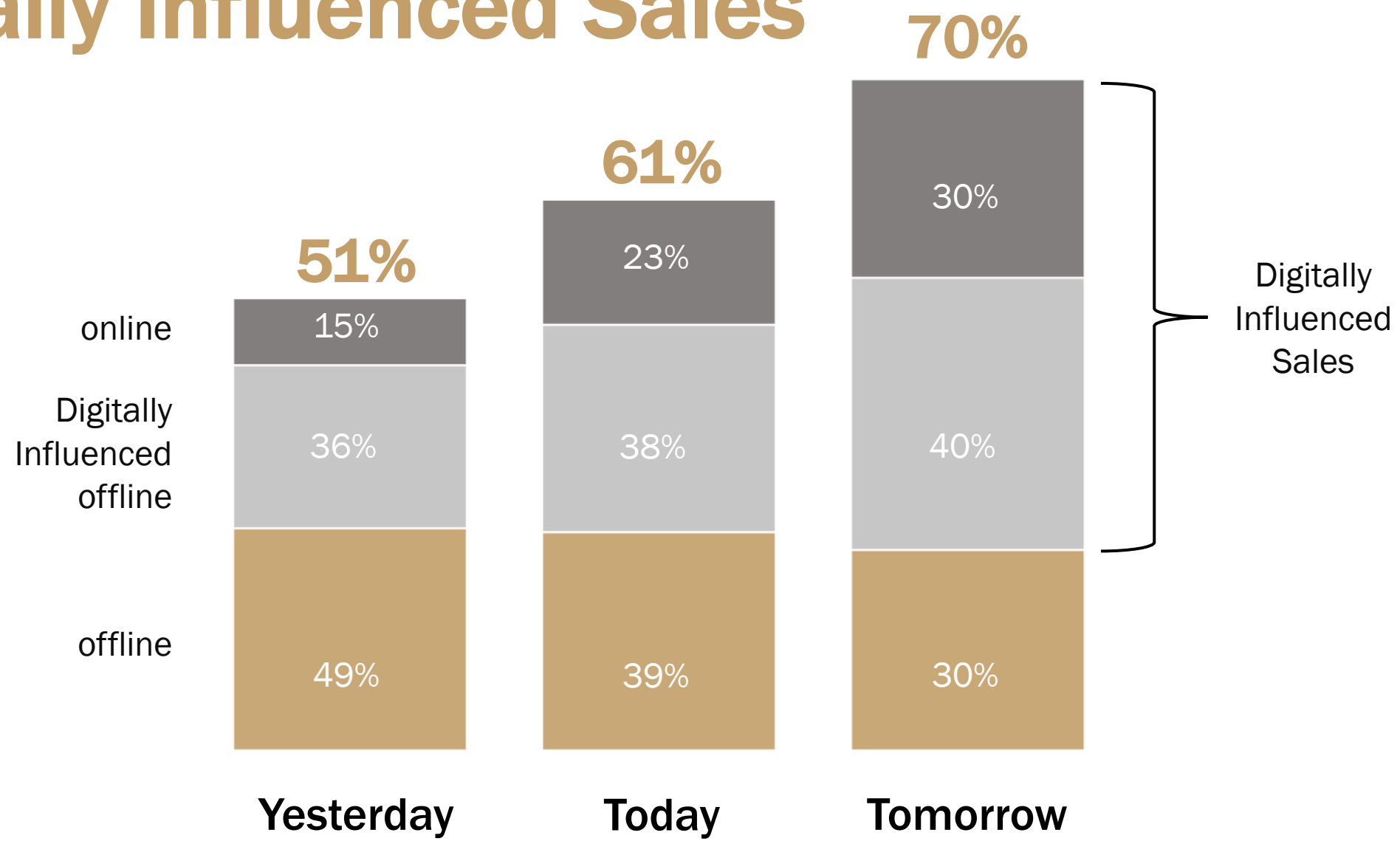
SOURCE: US Dept of Commerce, Economic Indicators Division, Retail Indicator Branch, Monthly, Seasonally Adj. Cat 4541 v 44000

# E-Commerce Revenue



SOURCE: US Dept of Commerce, Economic Indicators Division, Retail Indicator Branch, Monthly, Seasonally Adj. Cat 4541

# Digitally Influenced Sales



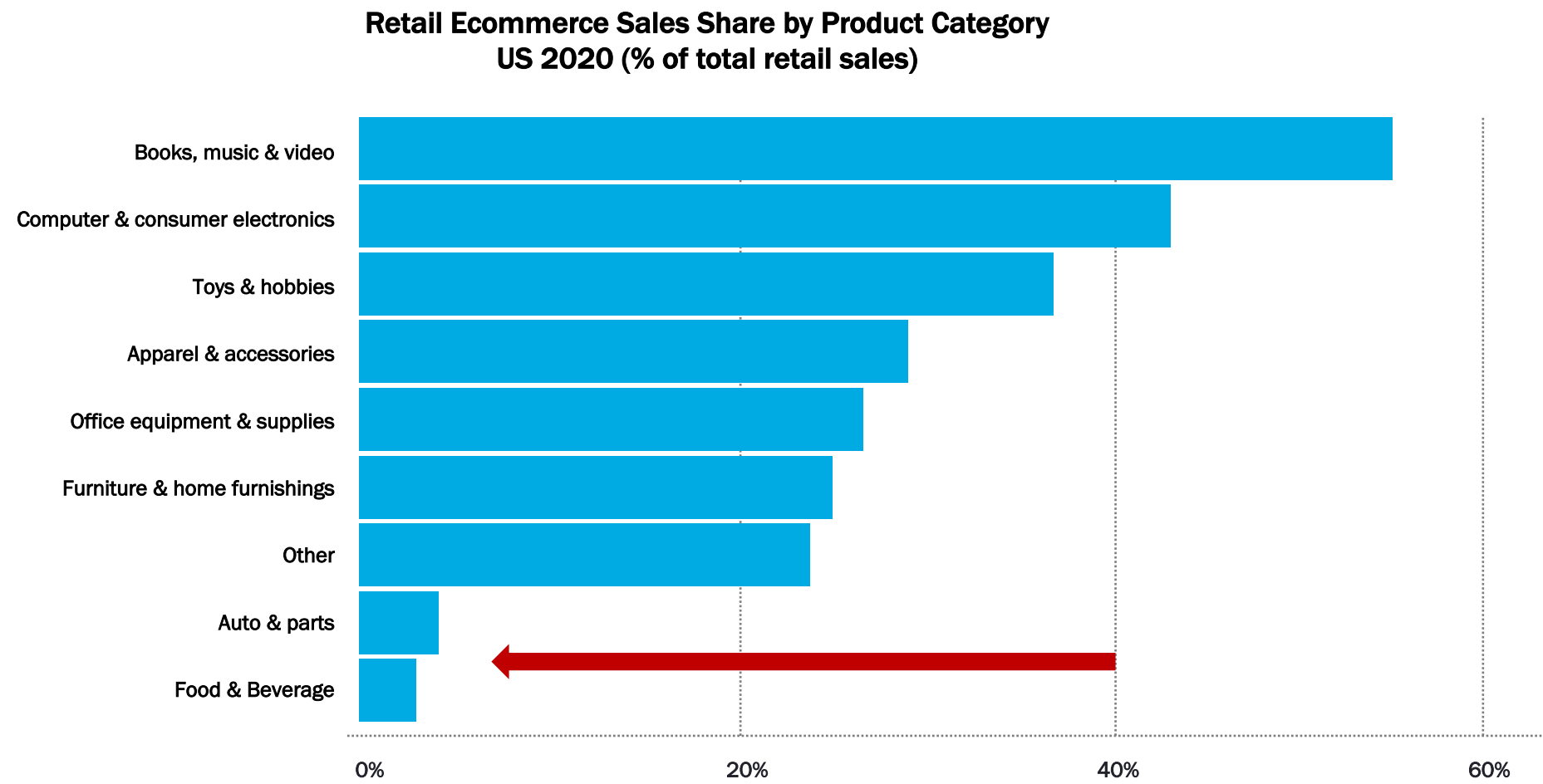


# Grocery E-Commerce 2022

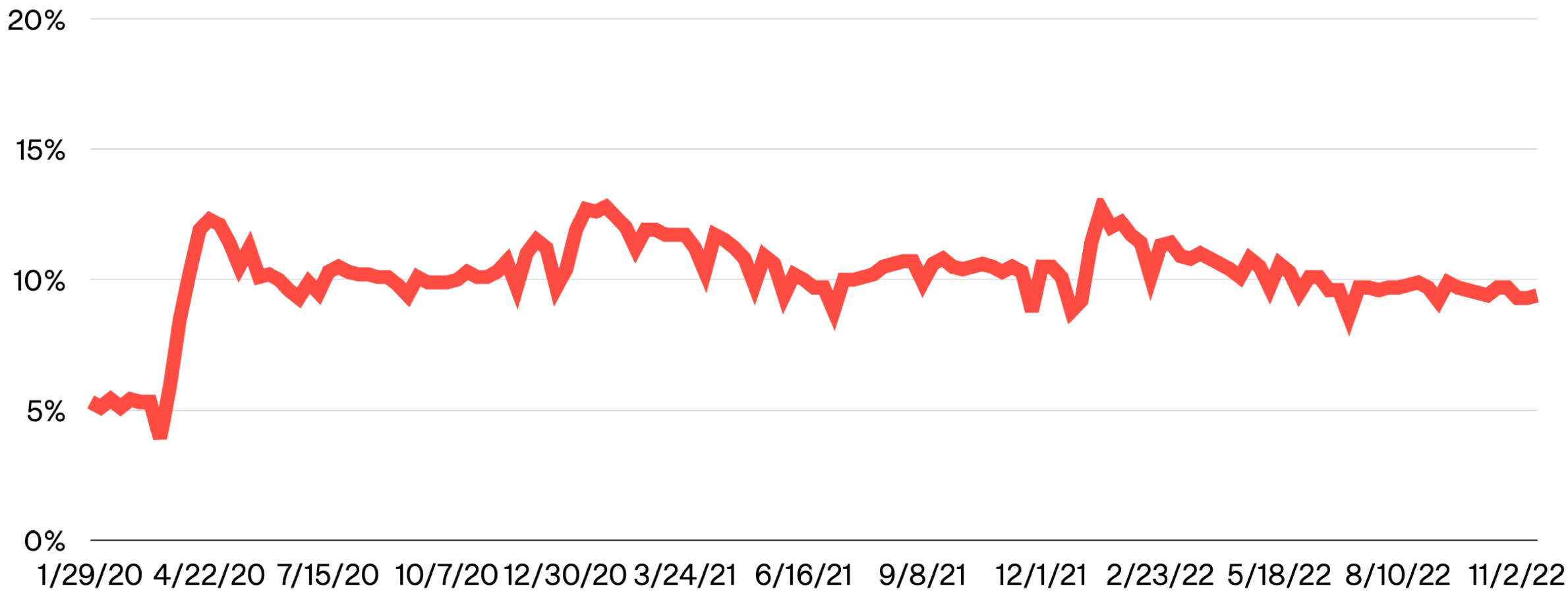
**\$96.8B**

10% of Grocery

# Digital Grocery was primed for disruption

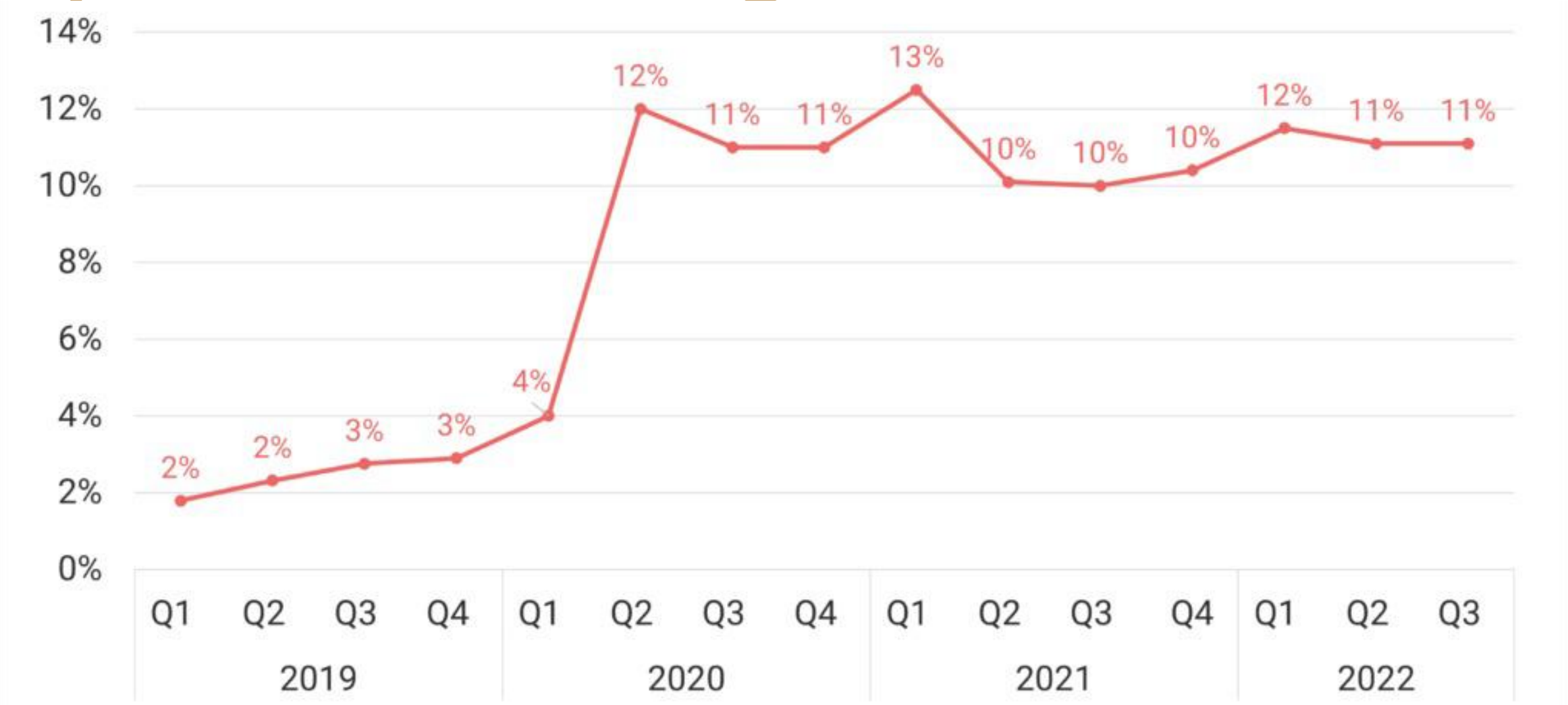


# Online share of US grocery spending



SOURCE: Earnest Analytics. 4-week trailing average via The New Consumer

# Sprouts Market – Digital Penetration

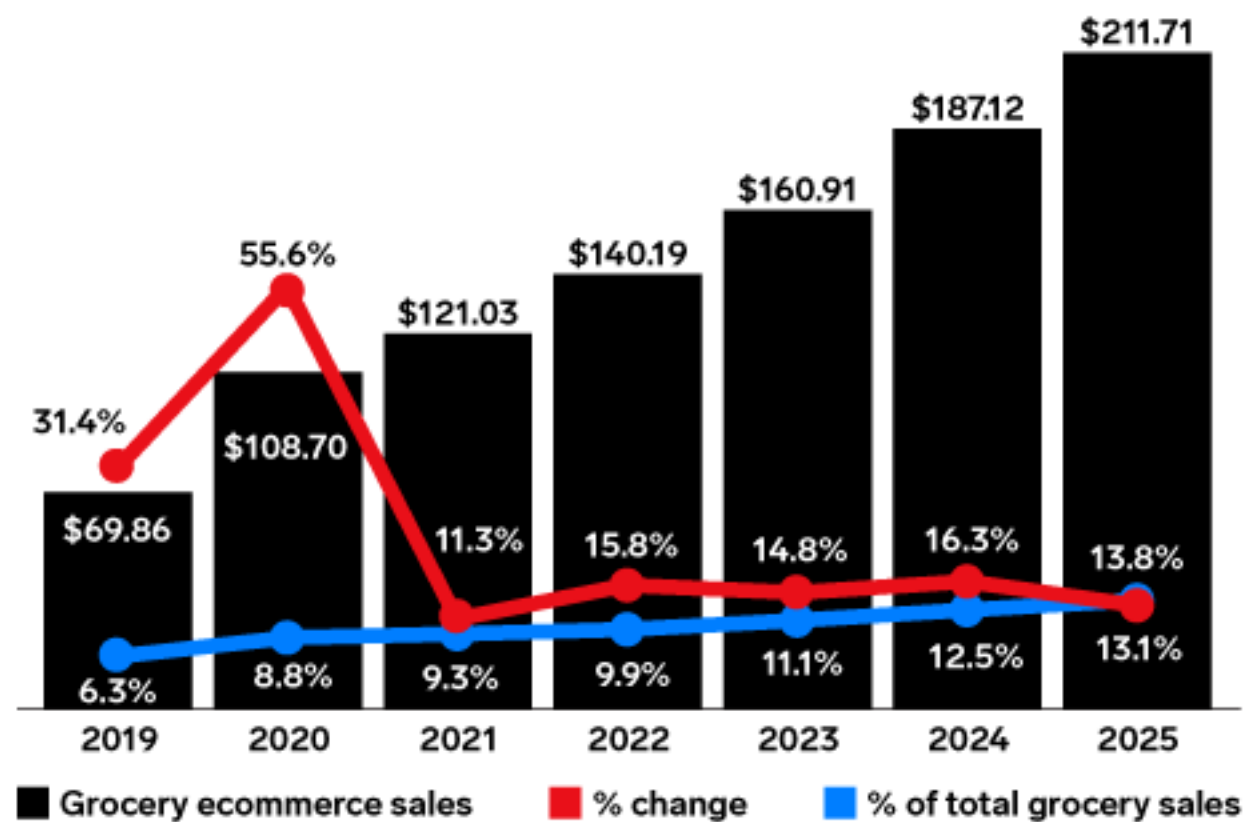


Source: Company Filings, Factset, Stratably

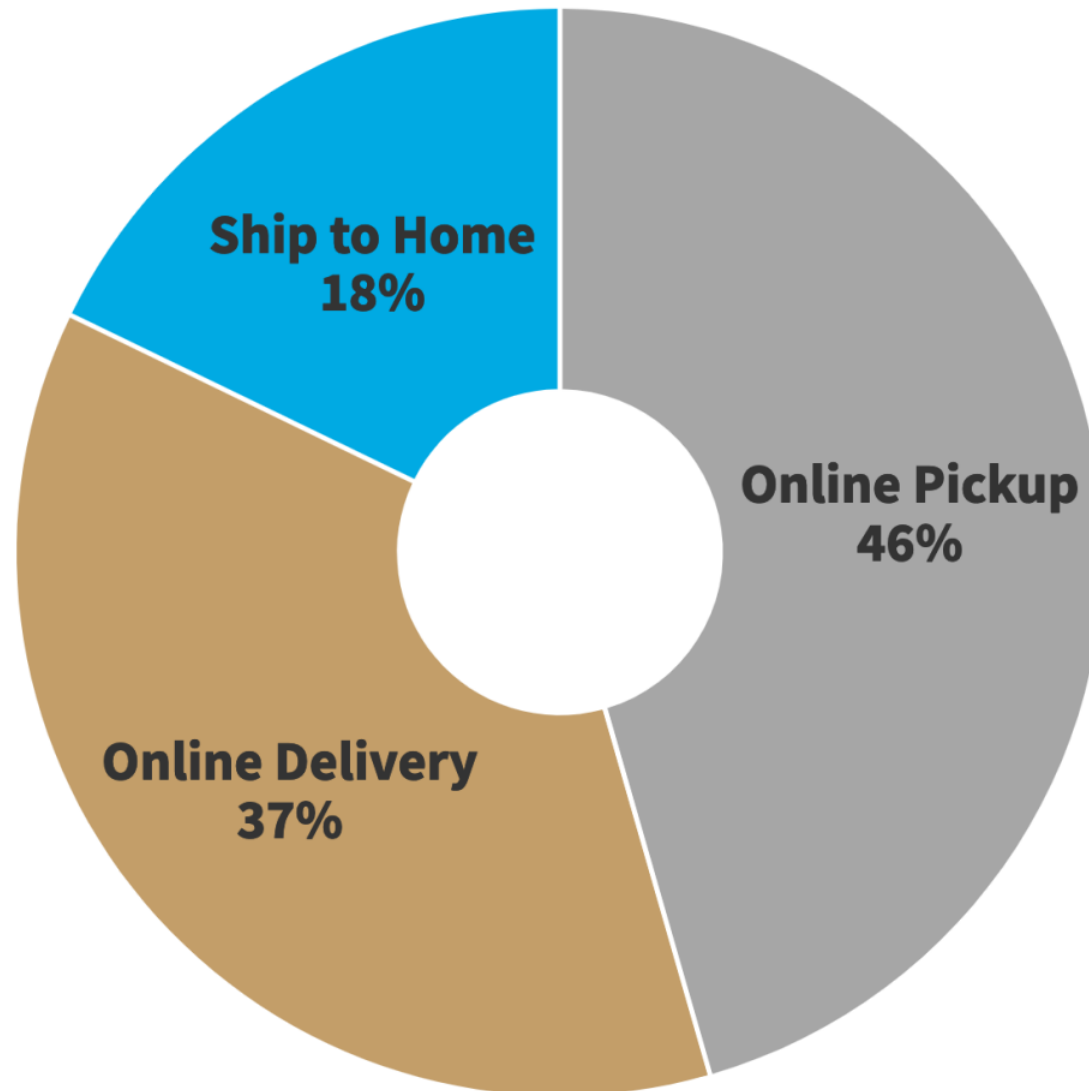


# US Grocery E-Commerce Sales 2019-2025

Billions, % Change, and % of total grocery sales

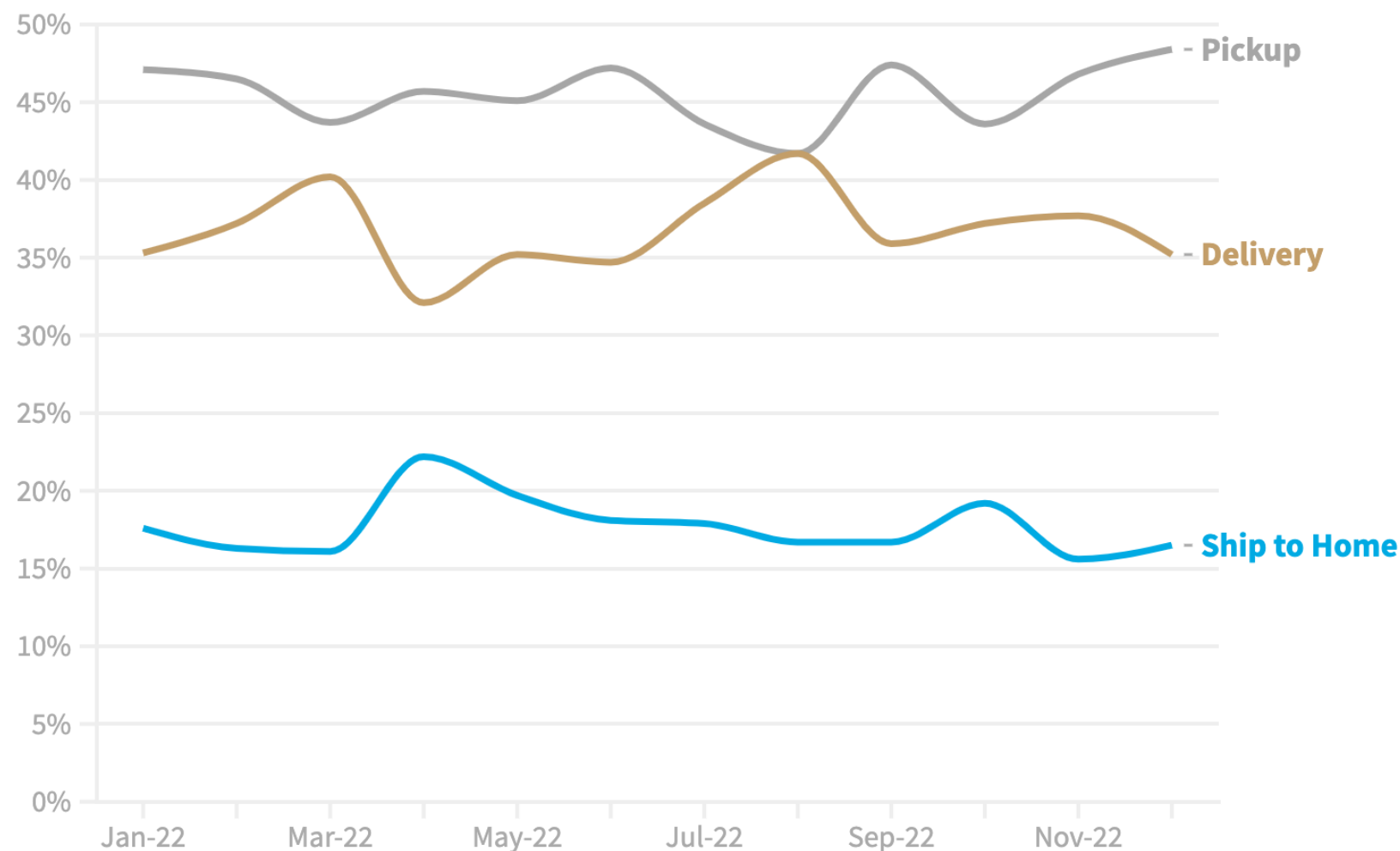


# Grocery E-Commerce Delivery Method



Source: Bricks Meet Clicks

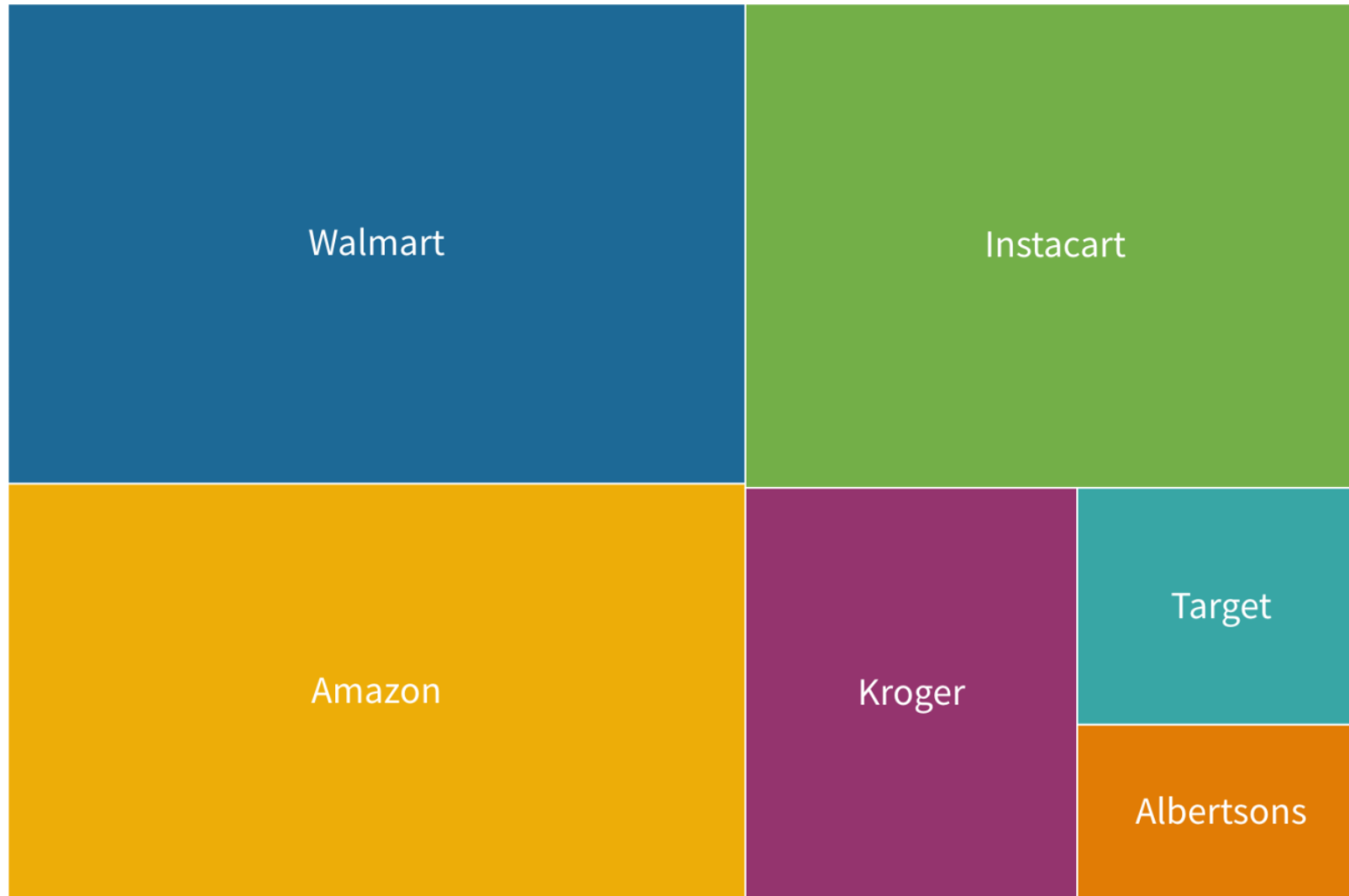
# Grocery E-Commerce Delivery Method



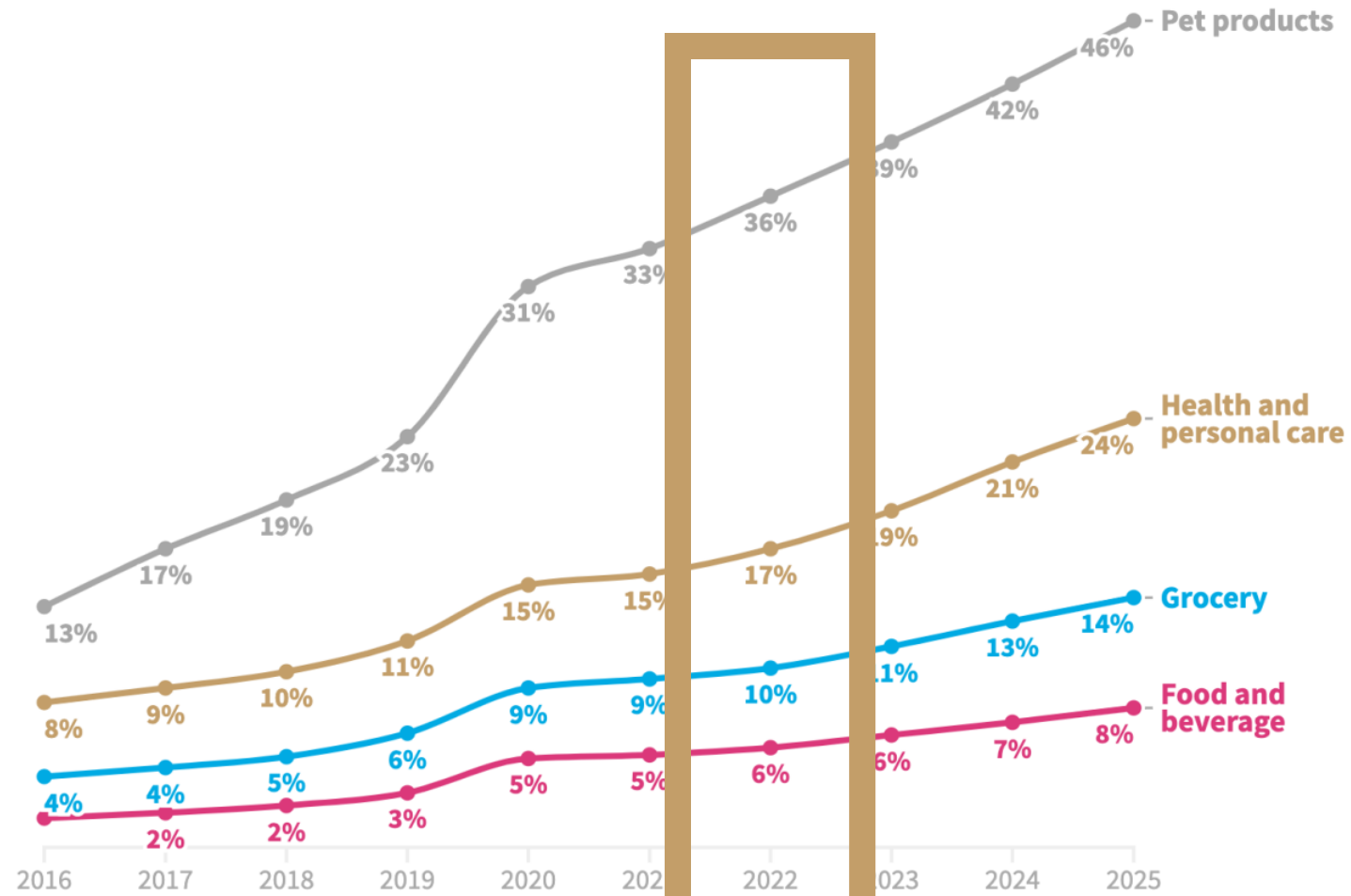
Source: Bricks Meet Clicks



# Top 6 Grocers Are 87% of Market



# E-Commerce Grocery Penetration



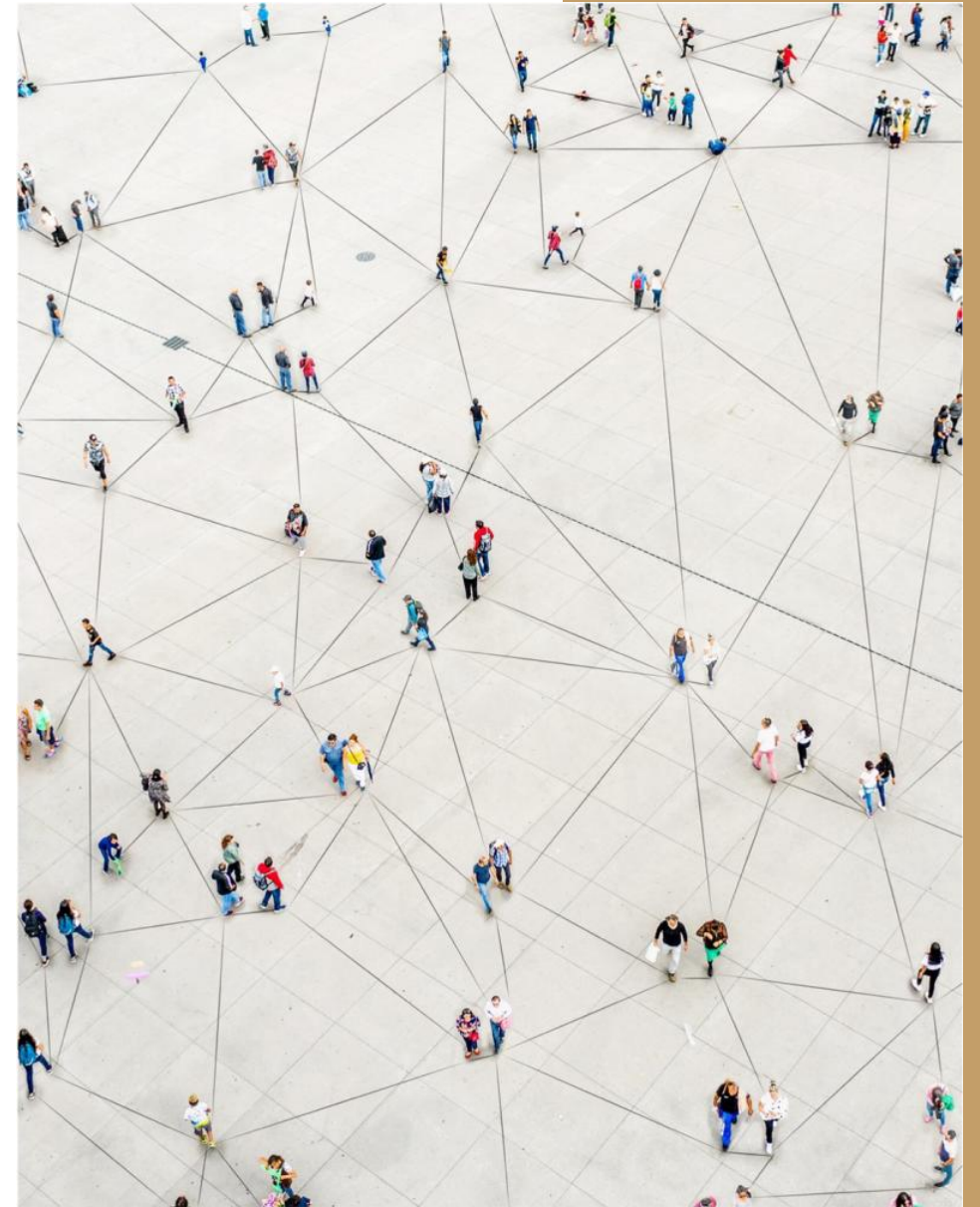
# Data Sources

US Retail & E-Com Sales Data: [US Dept of Commerce](#)

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