



**PUBLICIS
COMMERCE**

US Commerce Data Compendium

January 2023





2022 Retail

\$7.1T

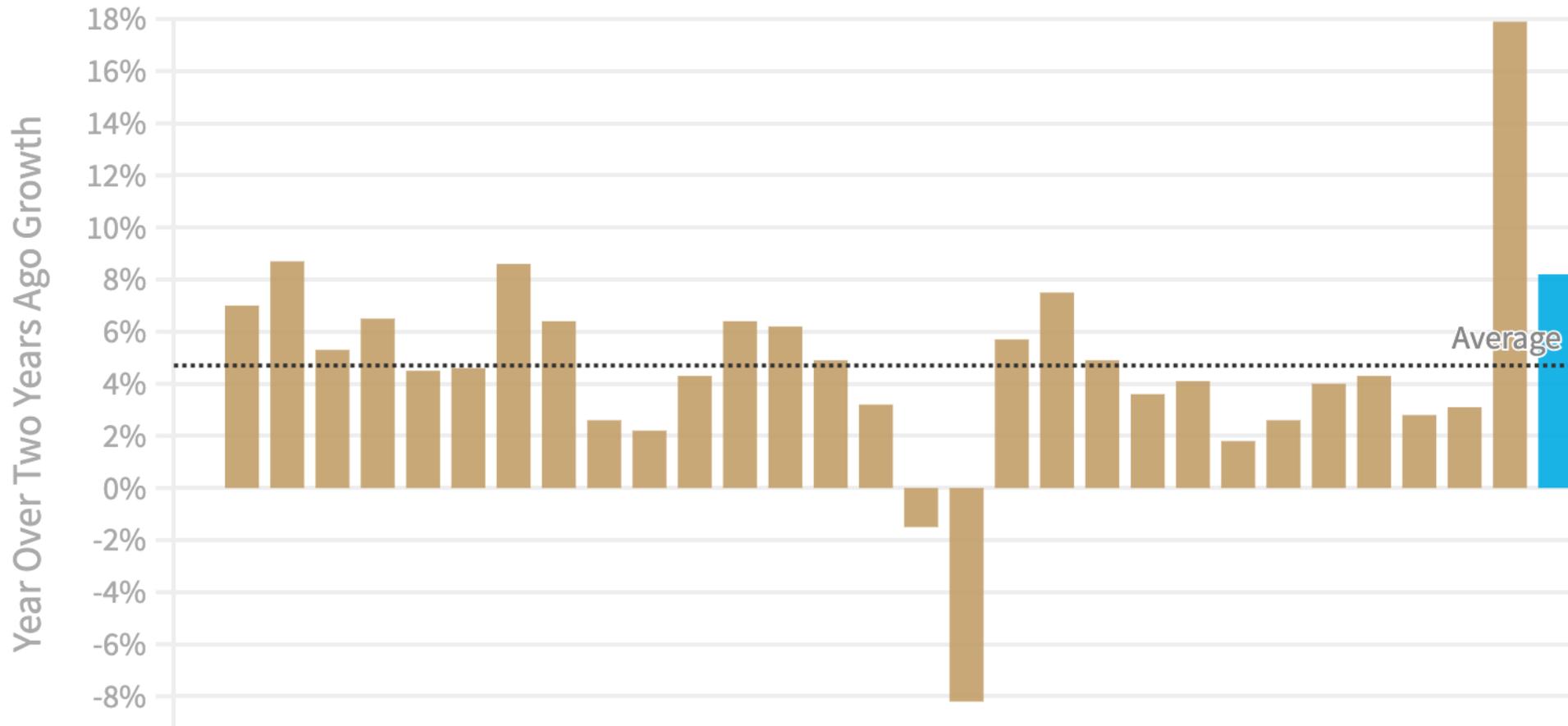
+8.2% v 2021

+31% v 2019

Retail Growth

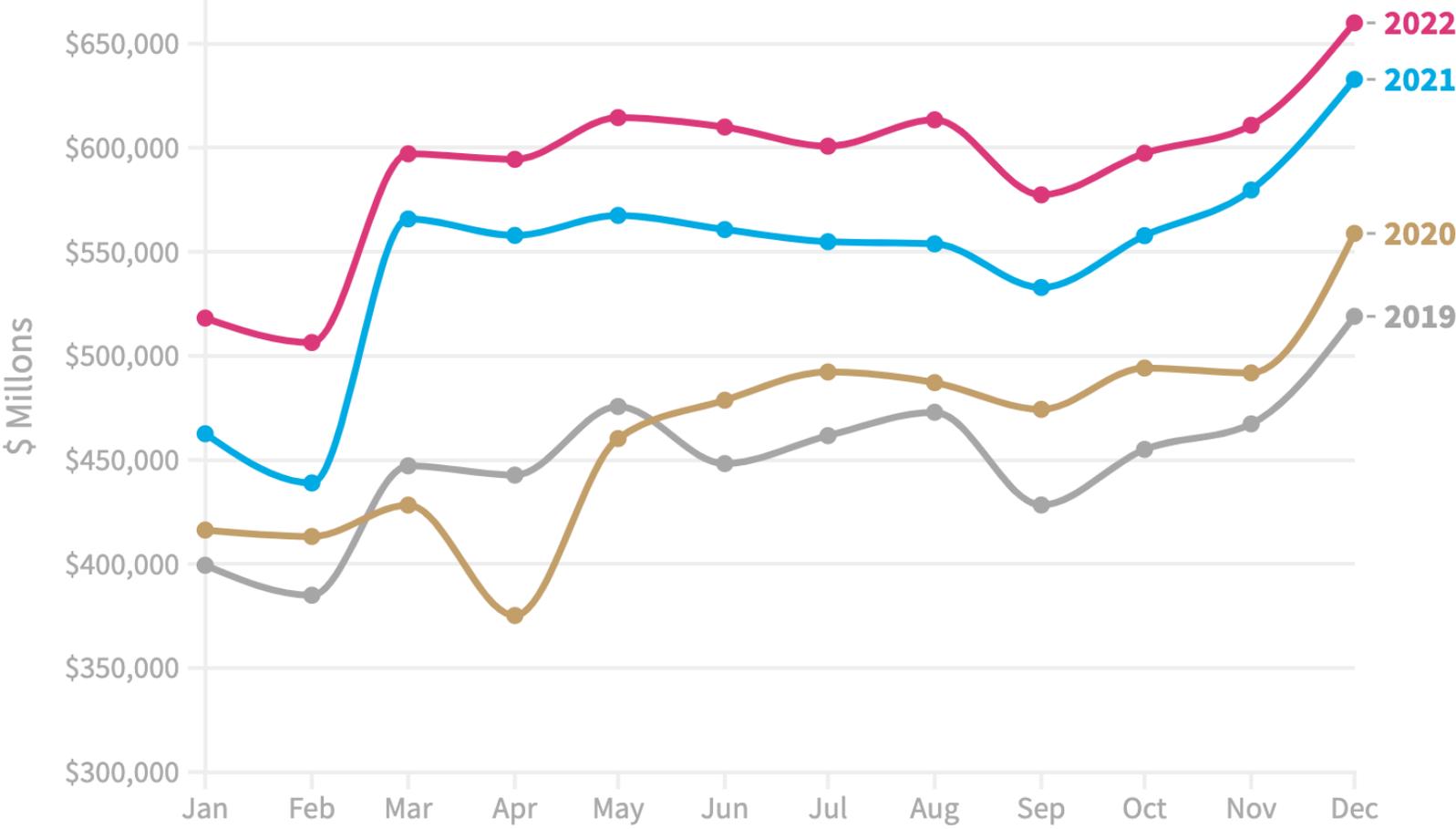
Year over Year

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

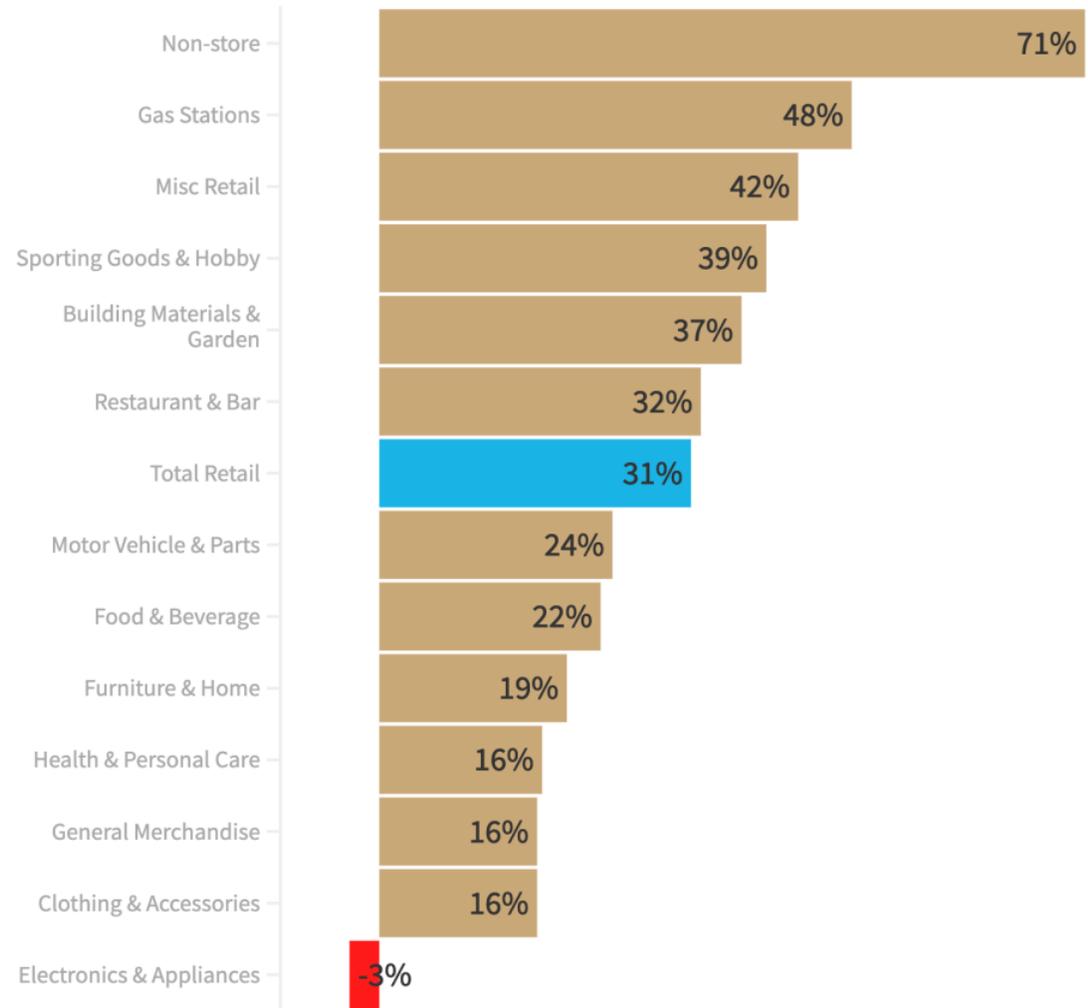
Monthly Retail Sales



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

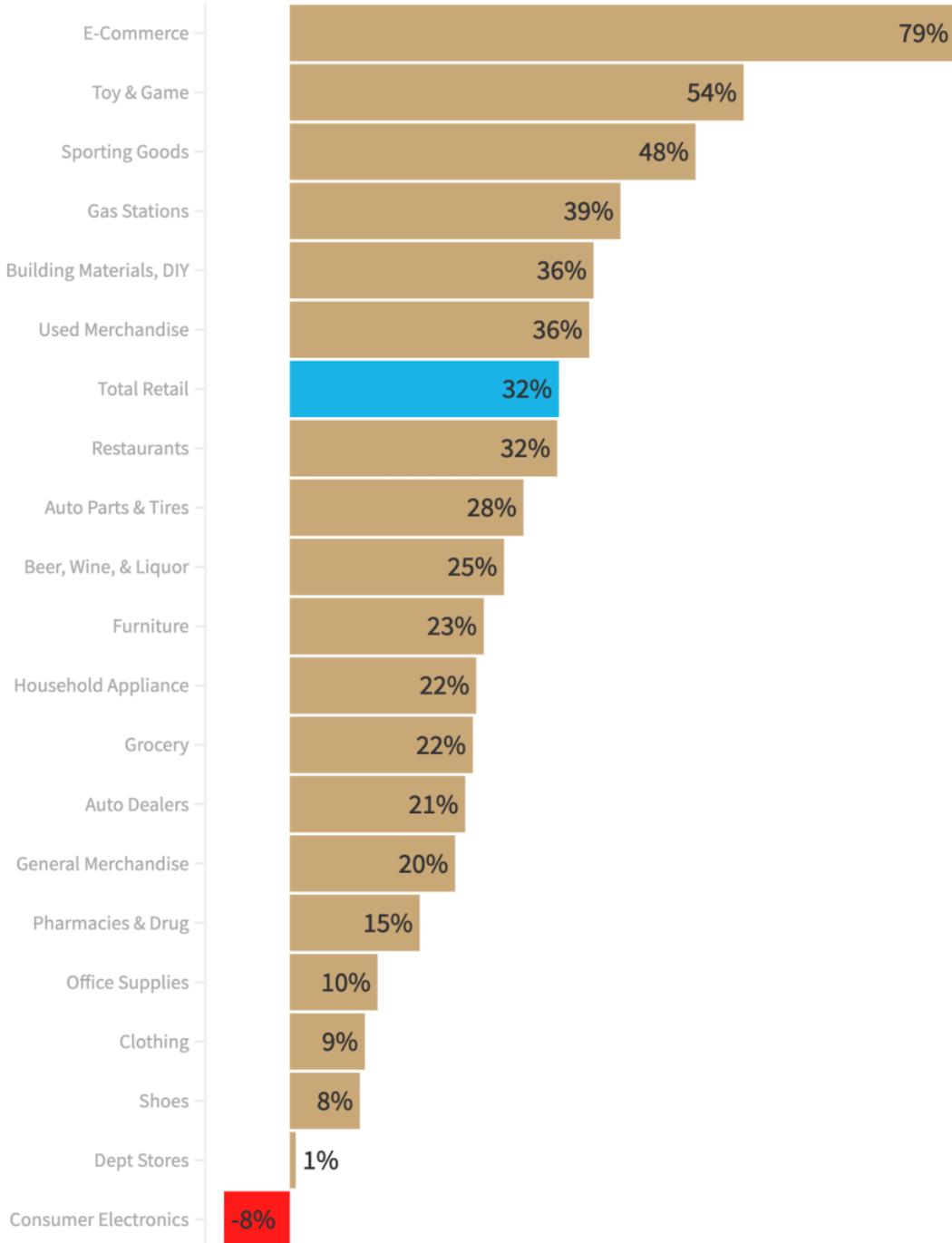


2022 Sales vs 2019



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.



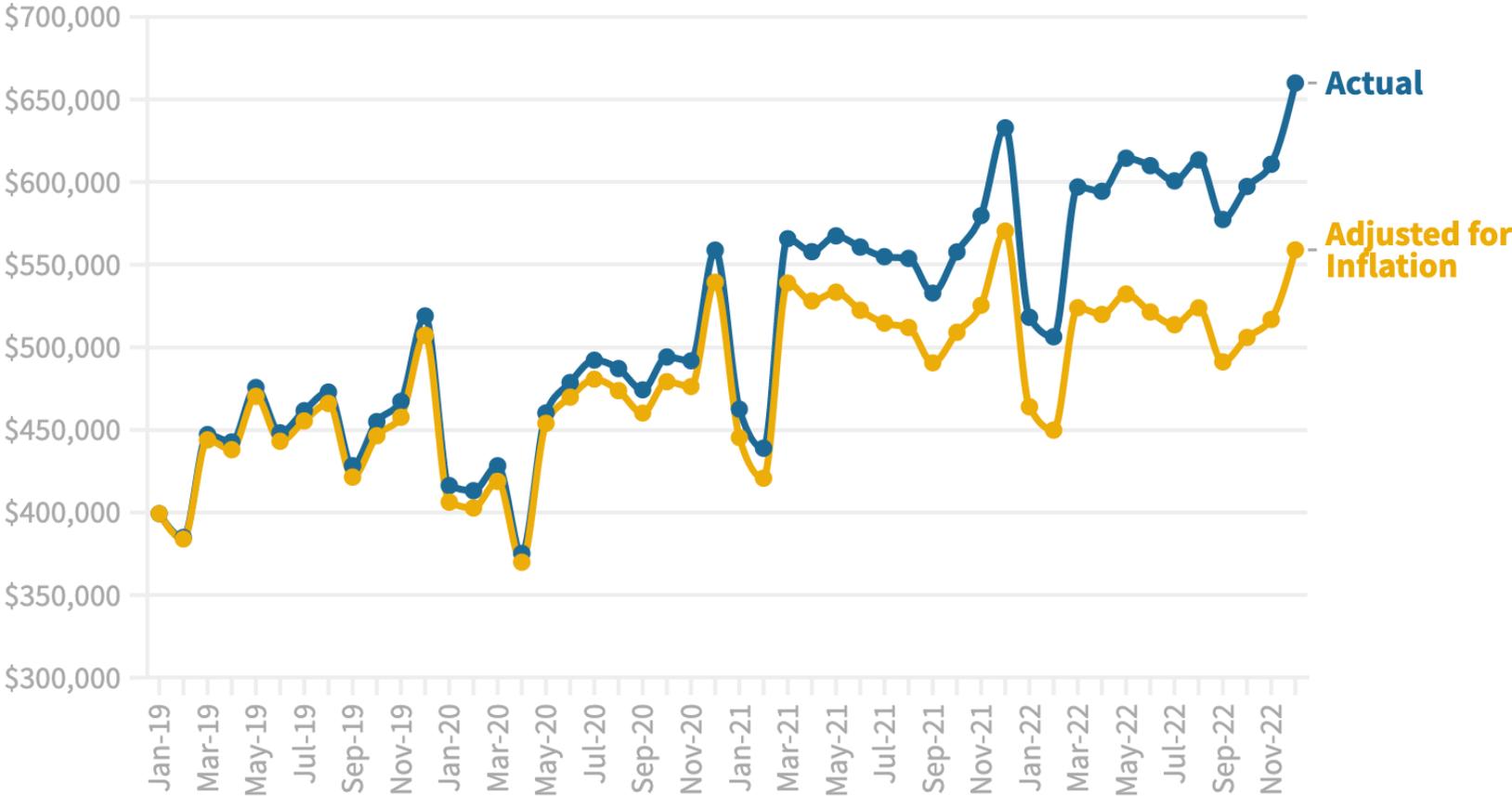
Inflation (December 2022)

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

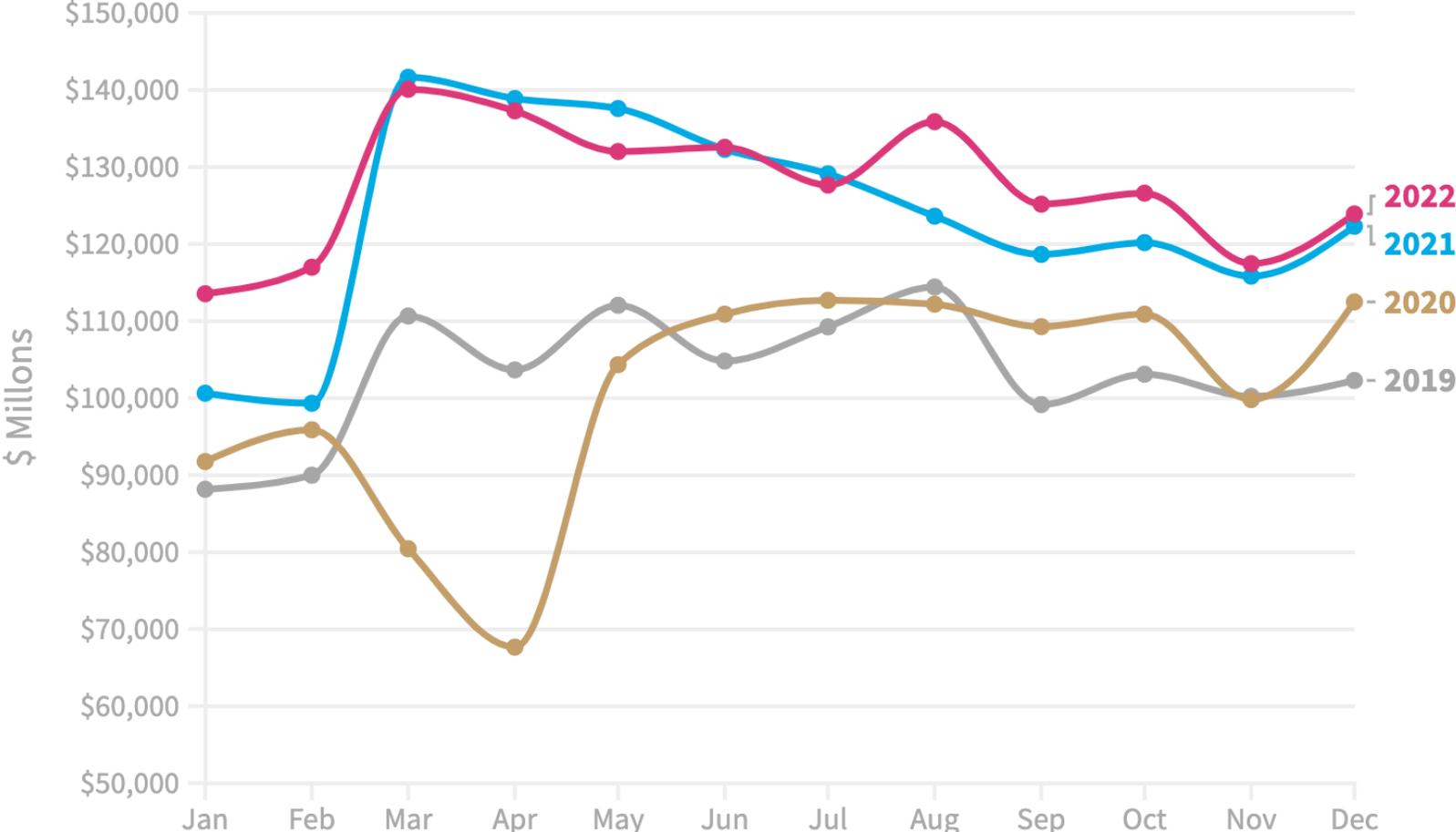
\$1.5T

+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

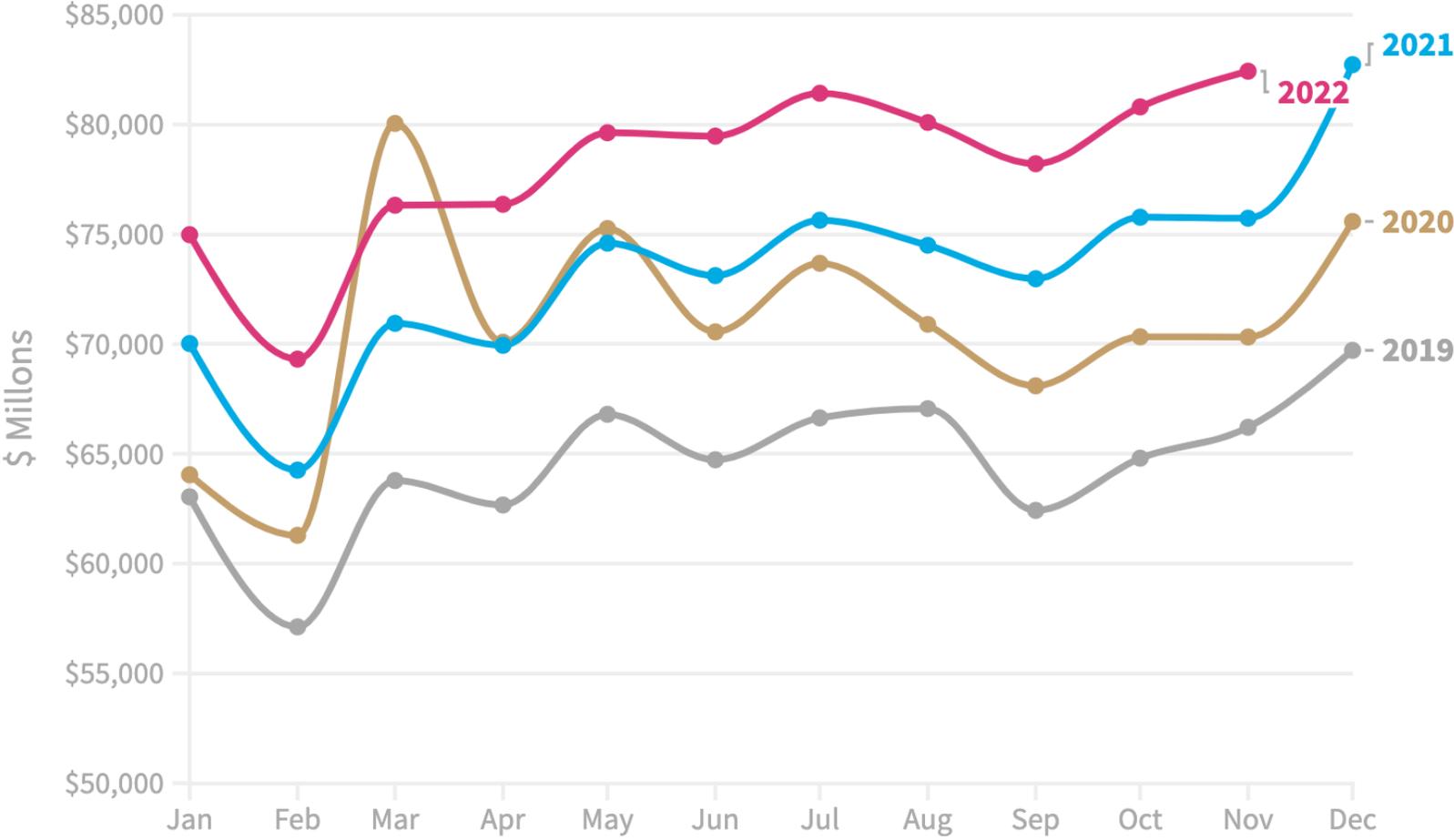
\$948B

+7.6% v 2021

+22.3% v 2019

13% of Retail

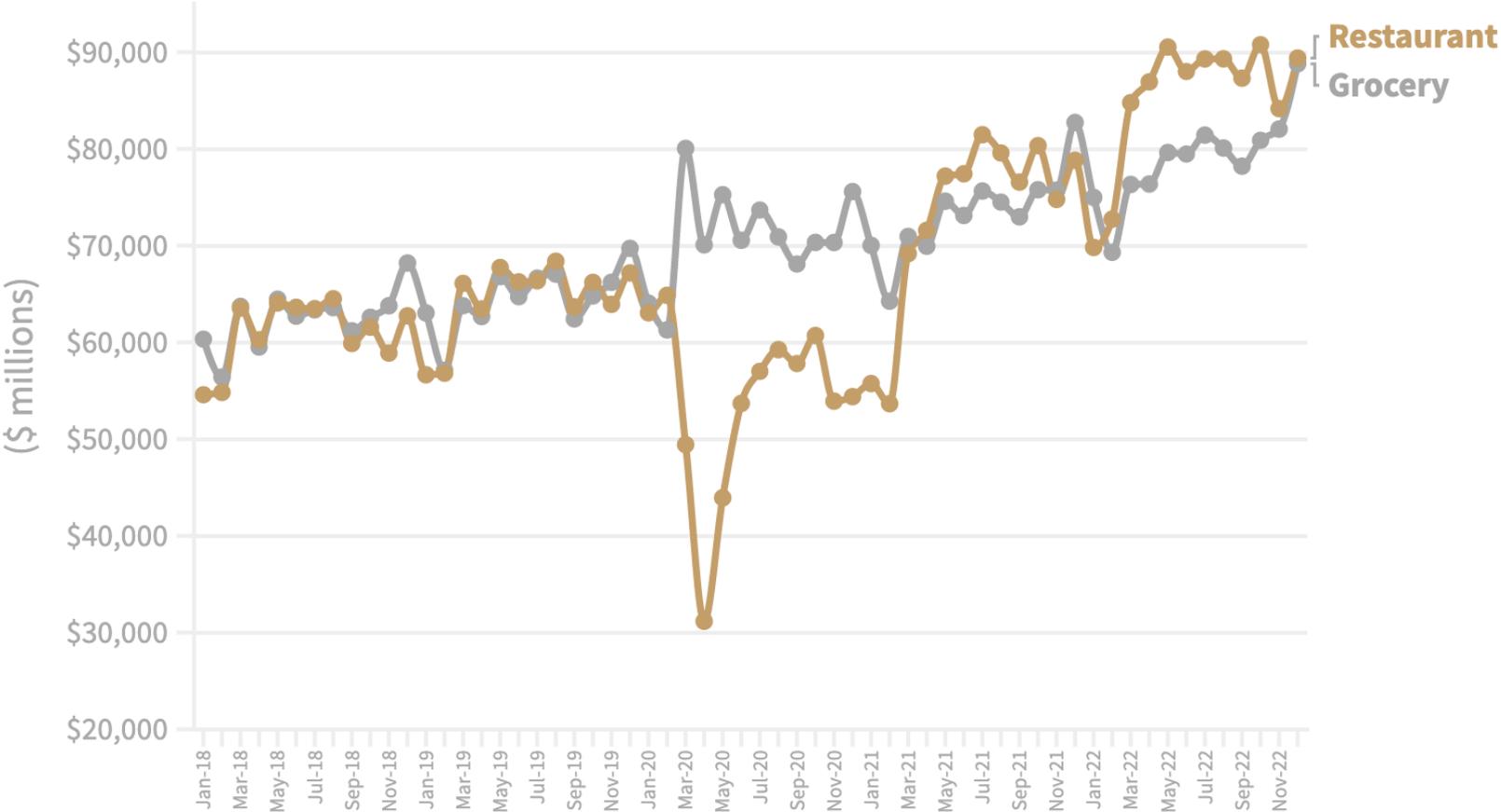
Monthly Grocery Sales



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



Restaurant vs Grocery

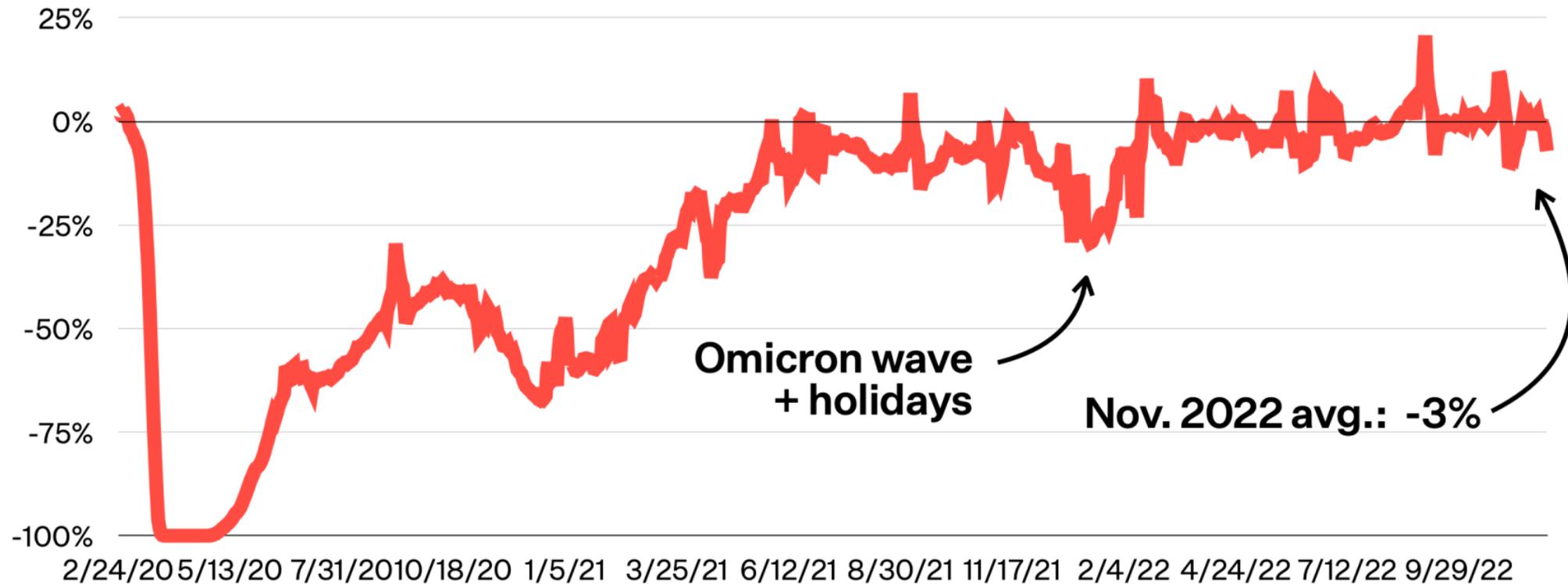


SOURCE: US Dept of Commerce, Economic Indicators Division, Retail Indicator Branch, Adv Monthly, Not Seasonally Adj. Cat 445 vs. 772



Restaurants Back to Normal

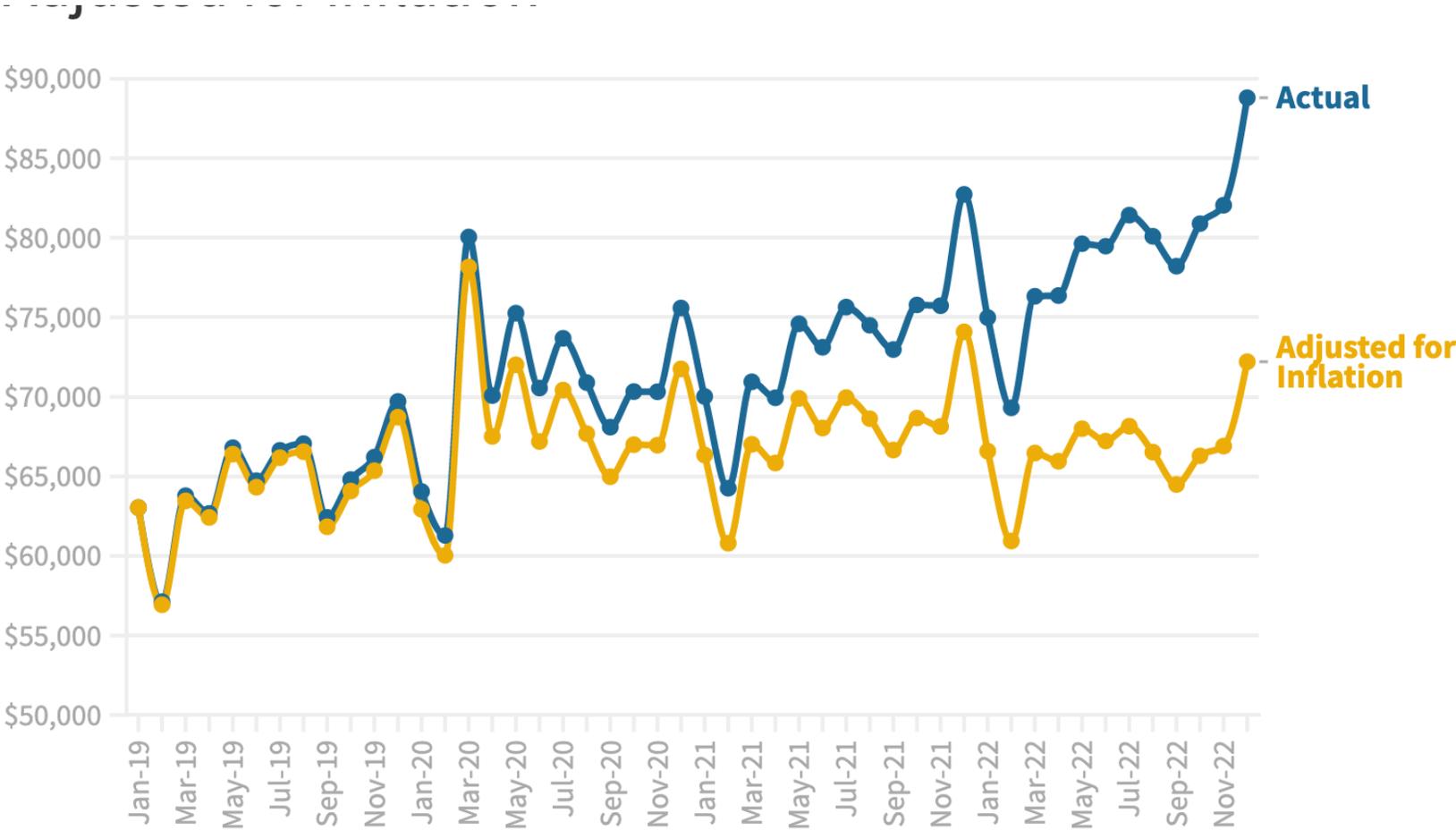
OpenTable seated diners change vs. 2019 'normal'



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

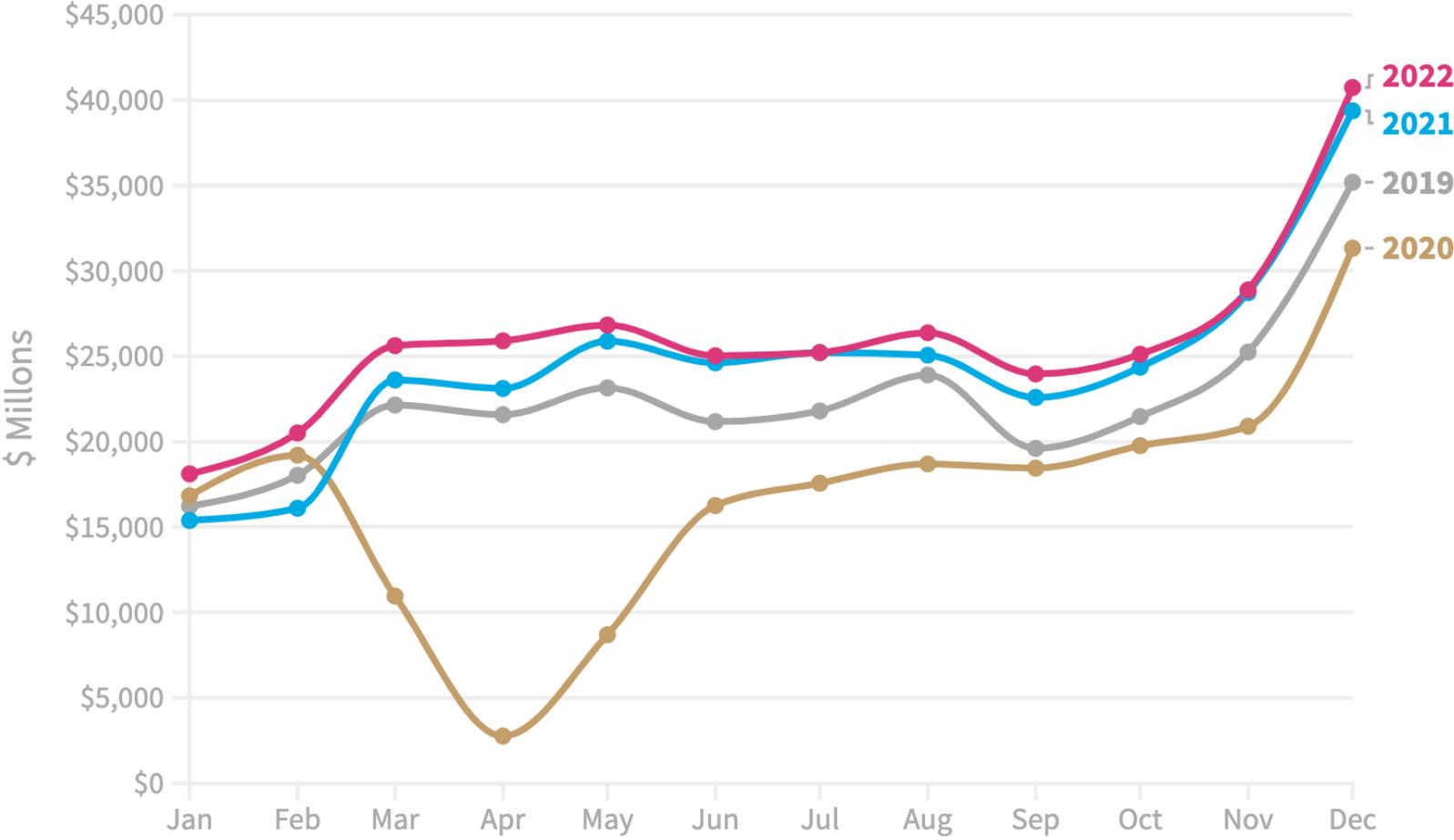
\$312B

+6.2% v 2021

+16% v 2019

4% of Retail

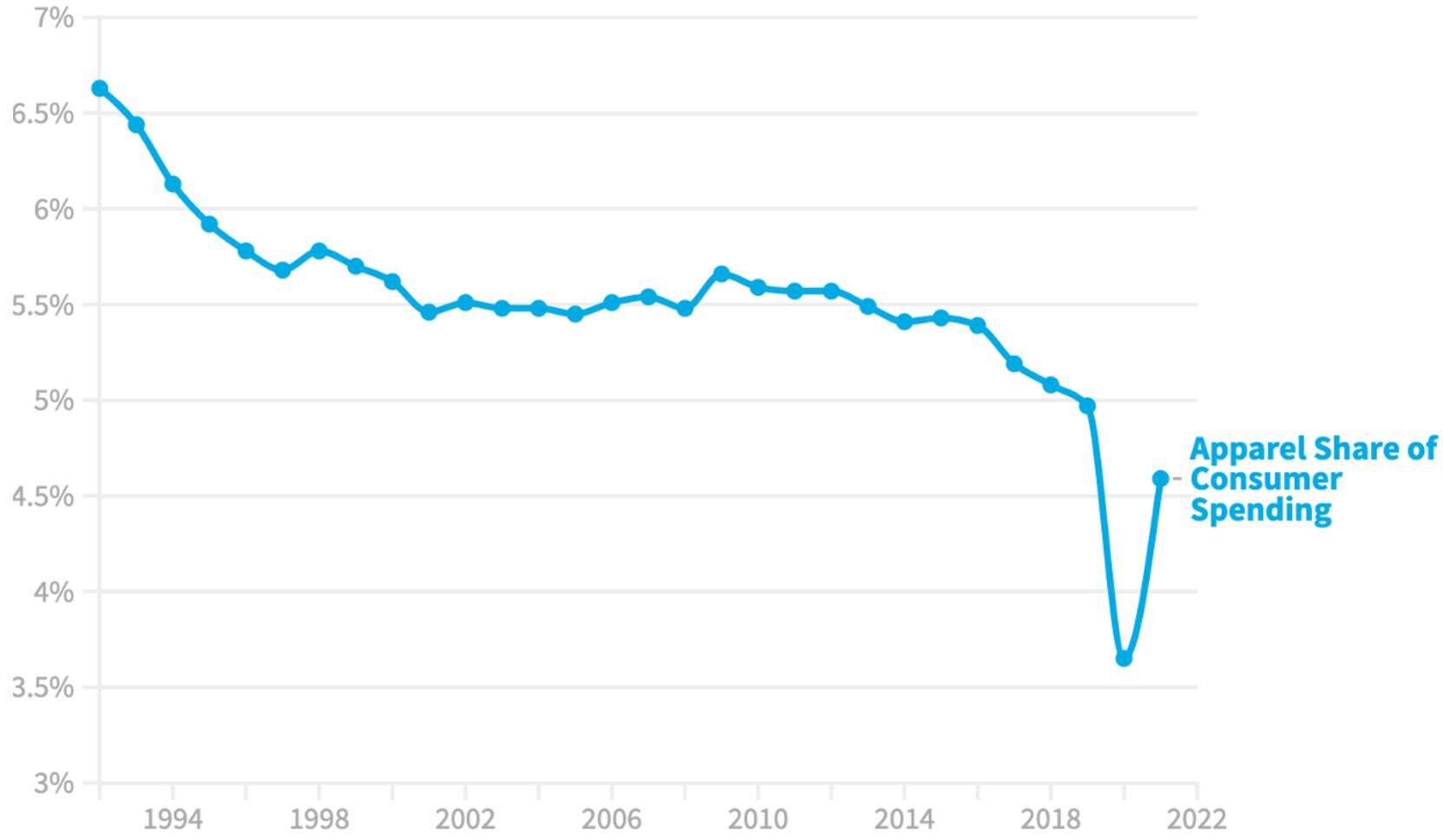
Monthly US Apparel Sales



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



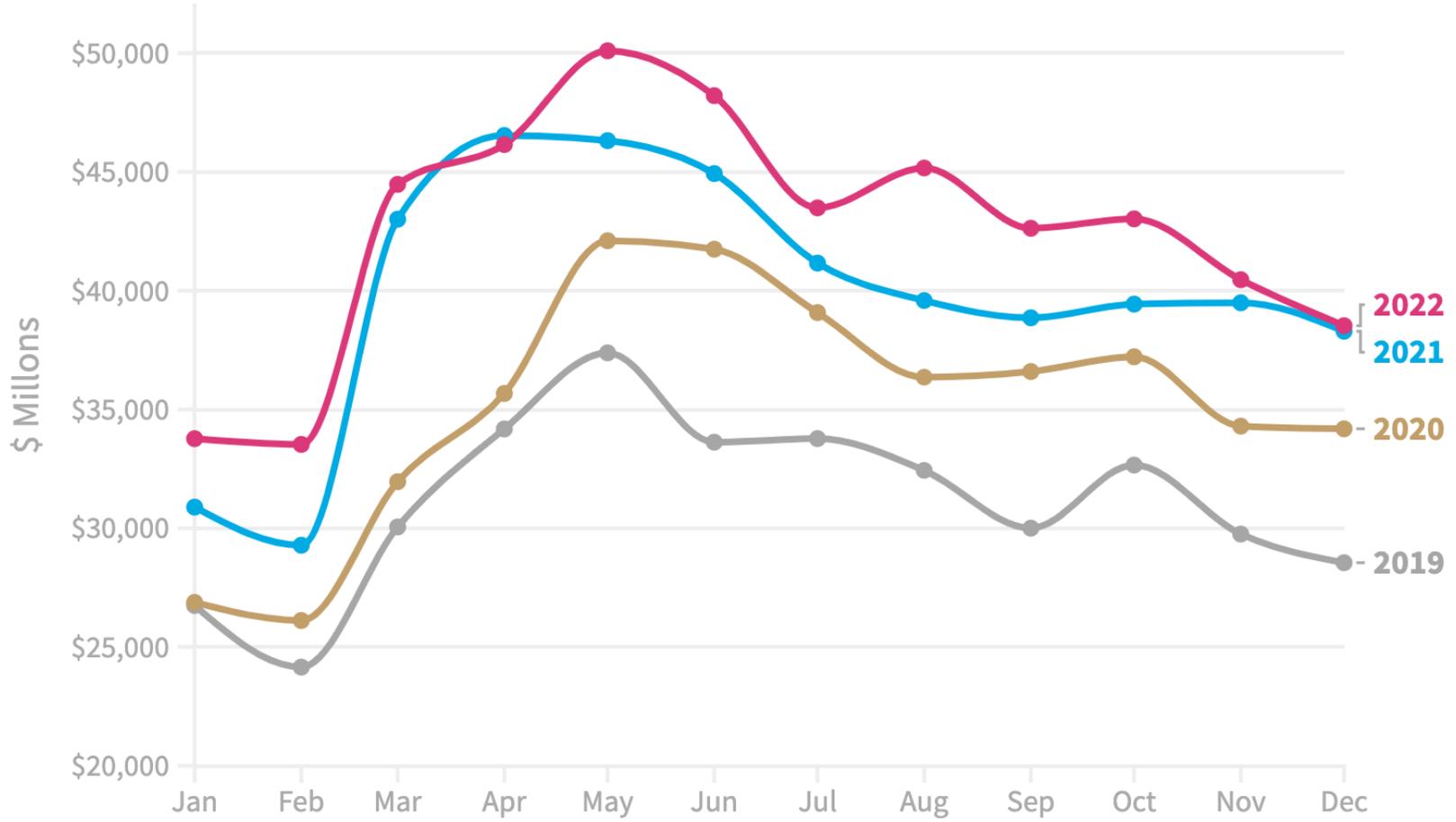
DIY / Home Improvement – 2022 Jan-Nov

\$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

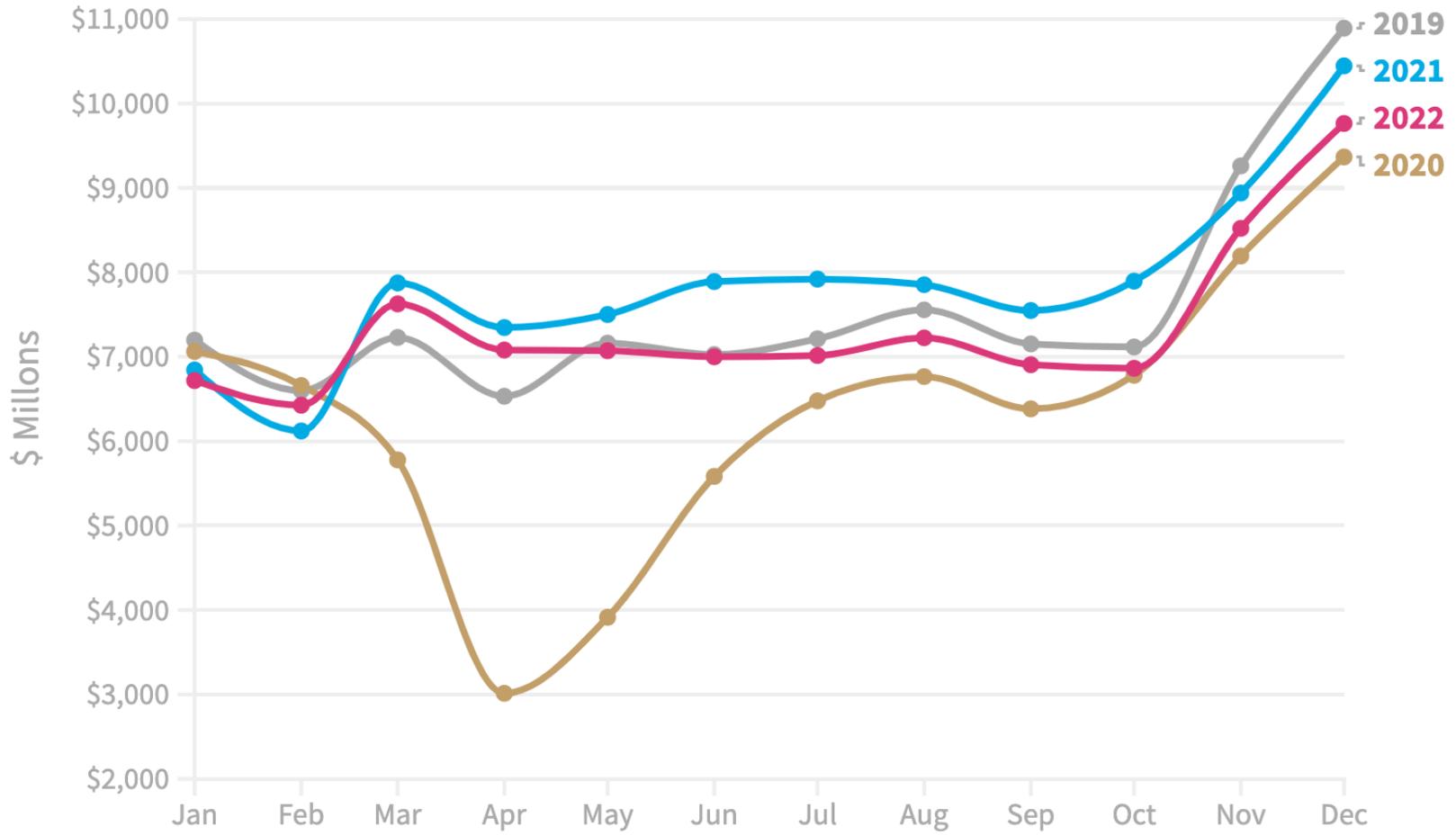
\$88B

-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



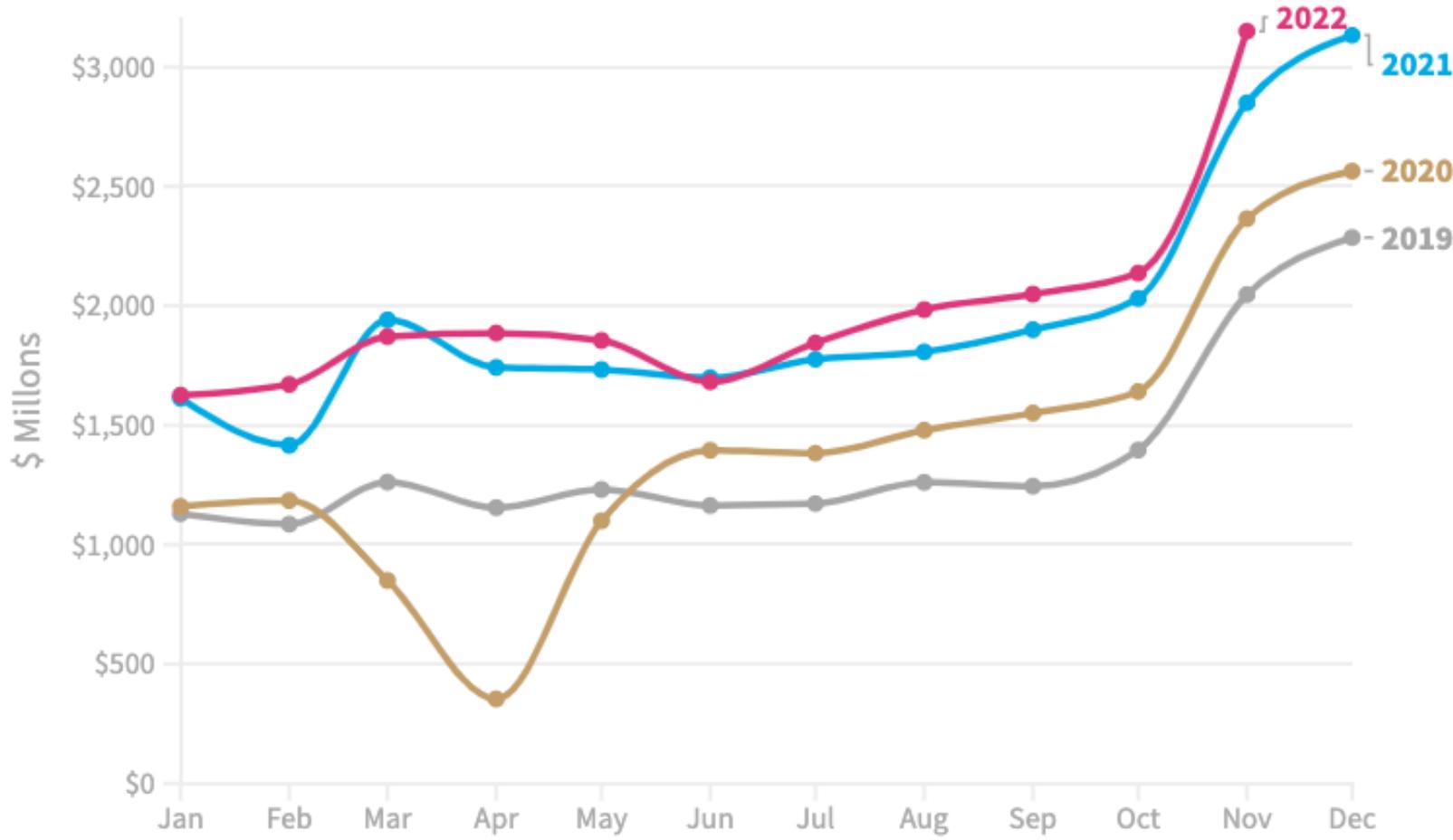
Toys – 2022 Jan-Nov

\$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

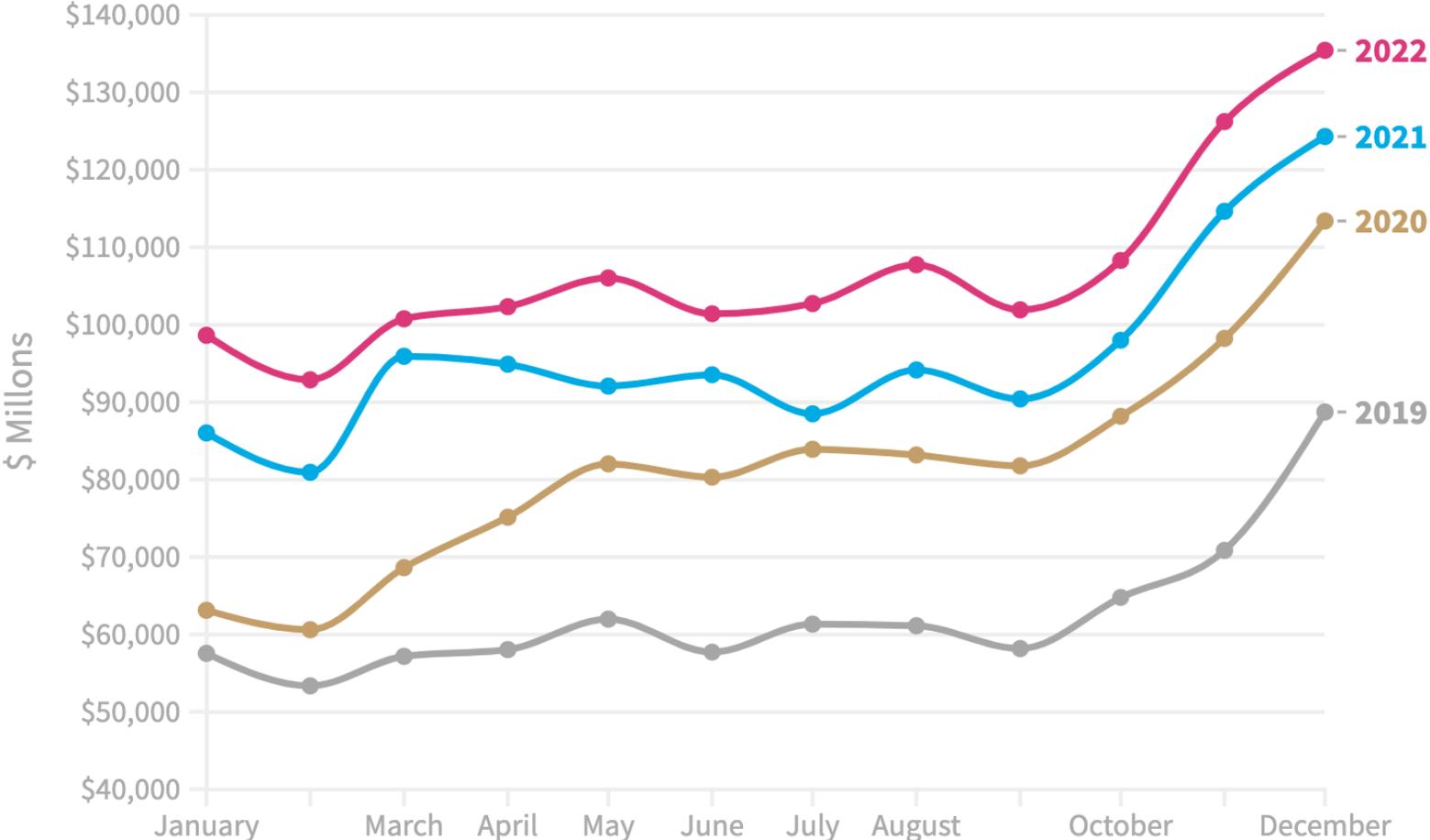
14% of US Retail

+8% v 2021

+32% v 2020

+87% v 2019

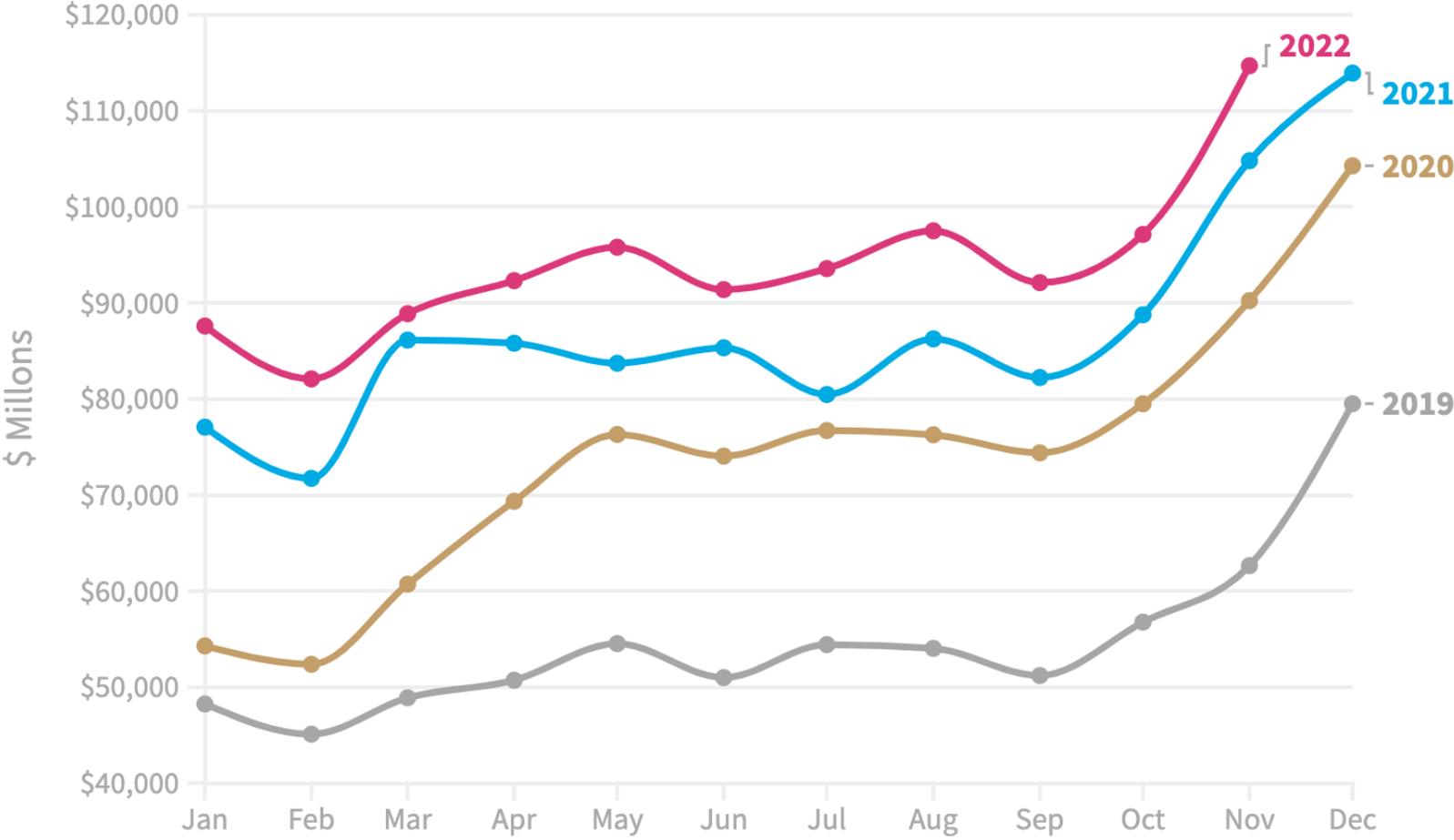
Non-Store Sales (E-Com & Catalog)



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



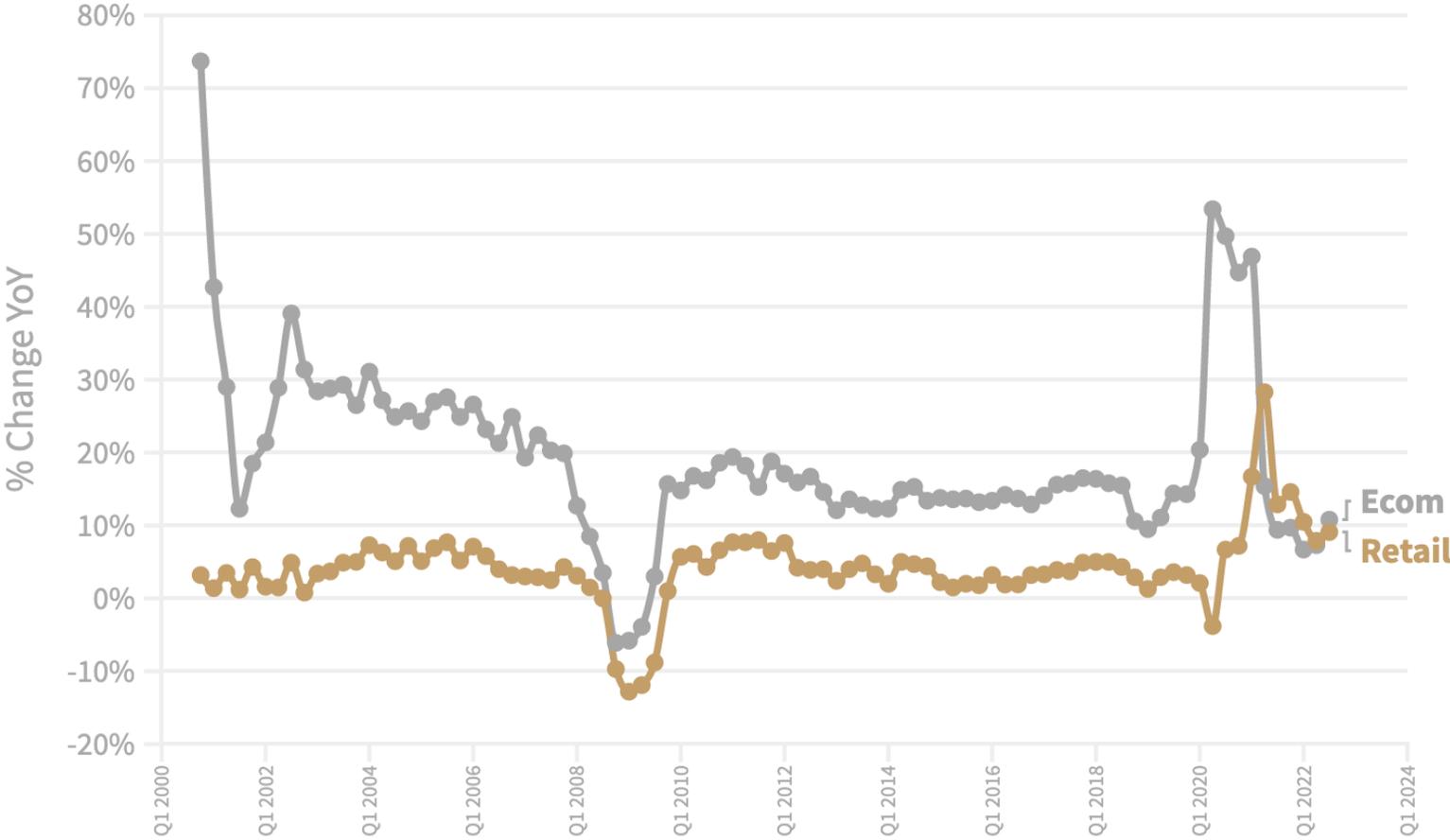
E-Commerce (MRTS)



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



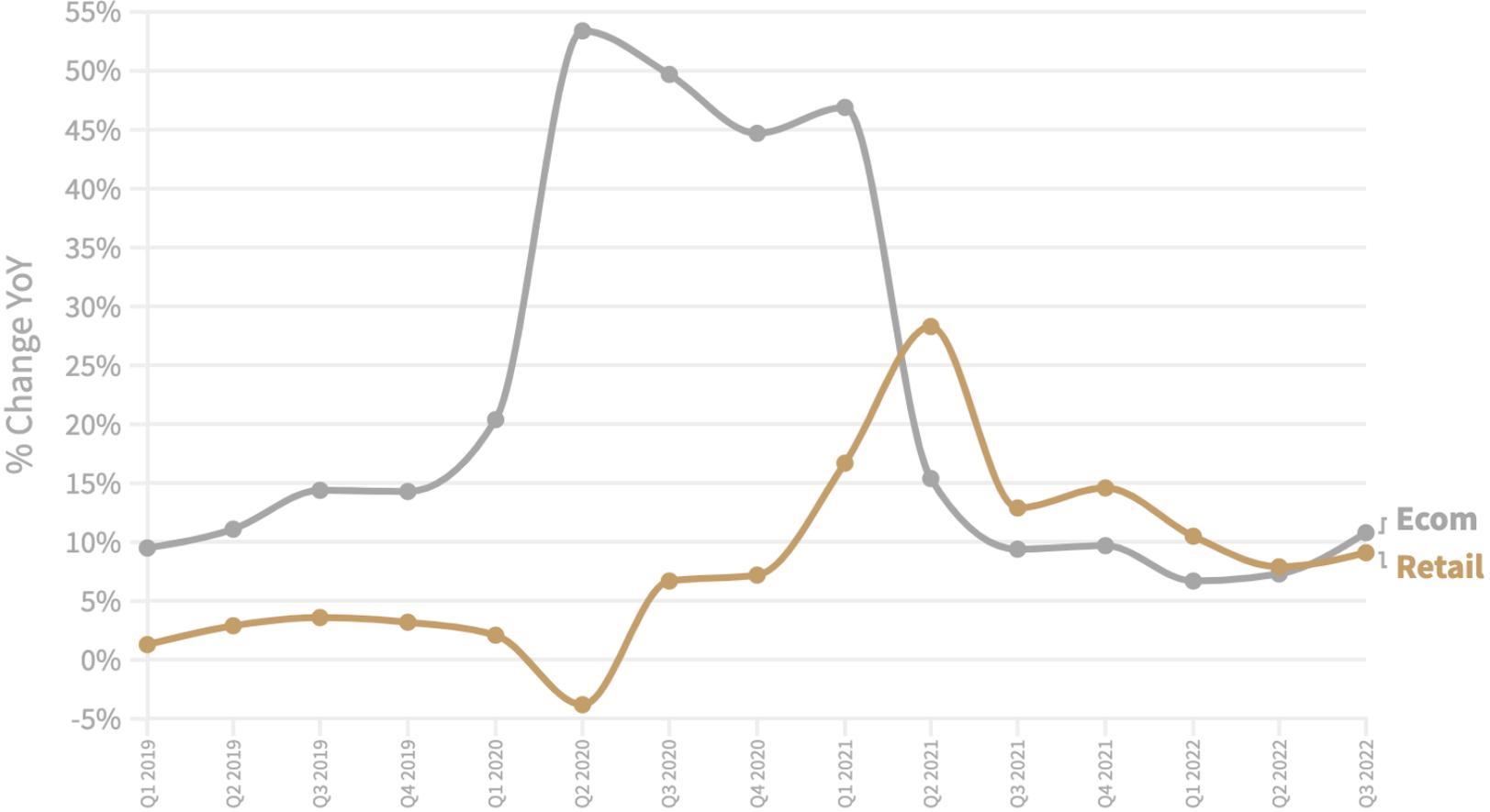
E-Commerce vs Retail YoY Growth



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



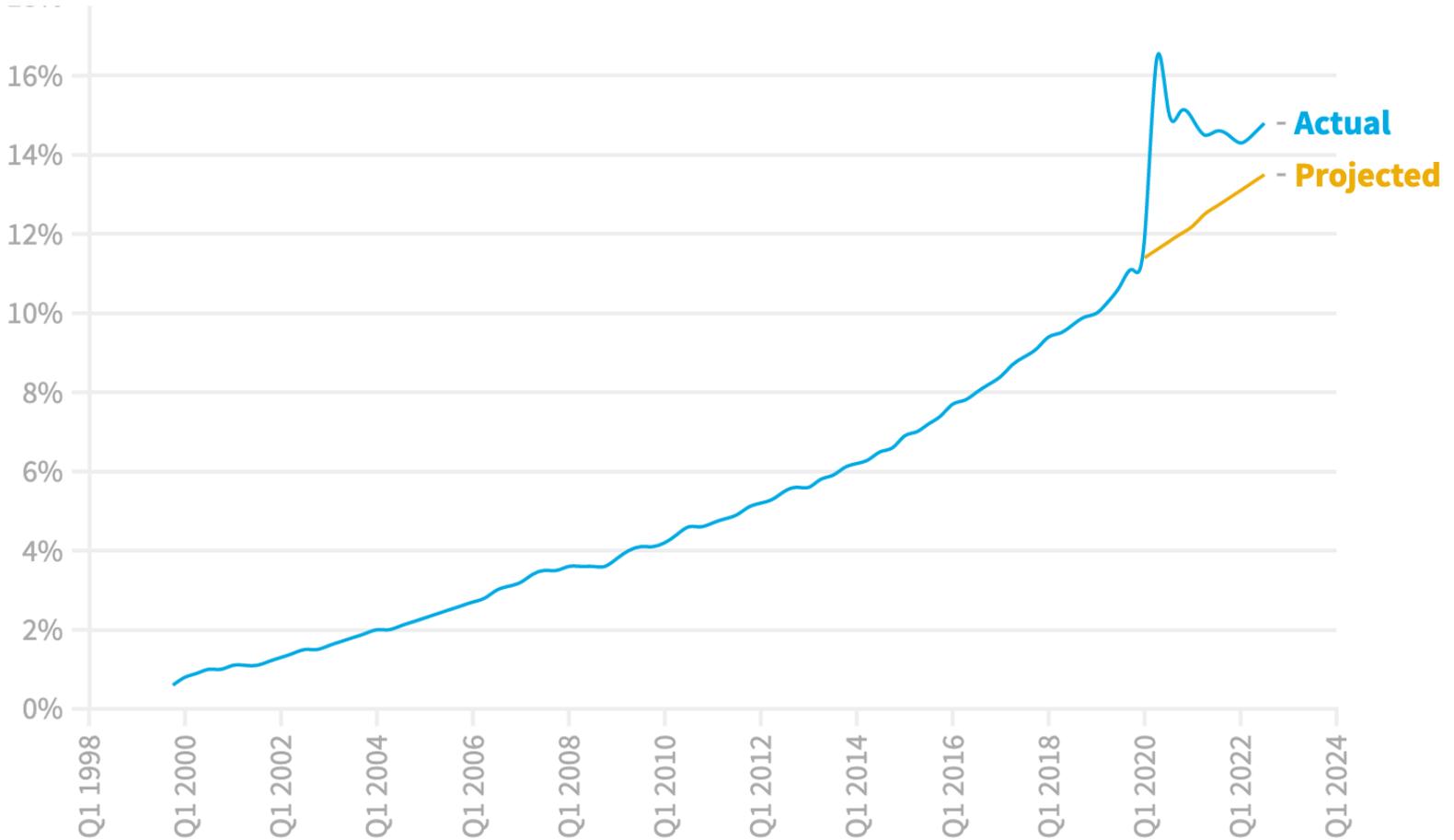
E-Commerce vs Retail YoY Growth



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



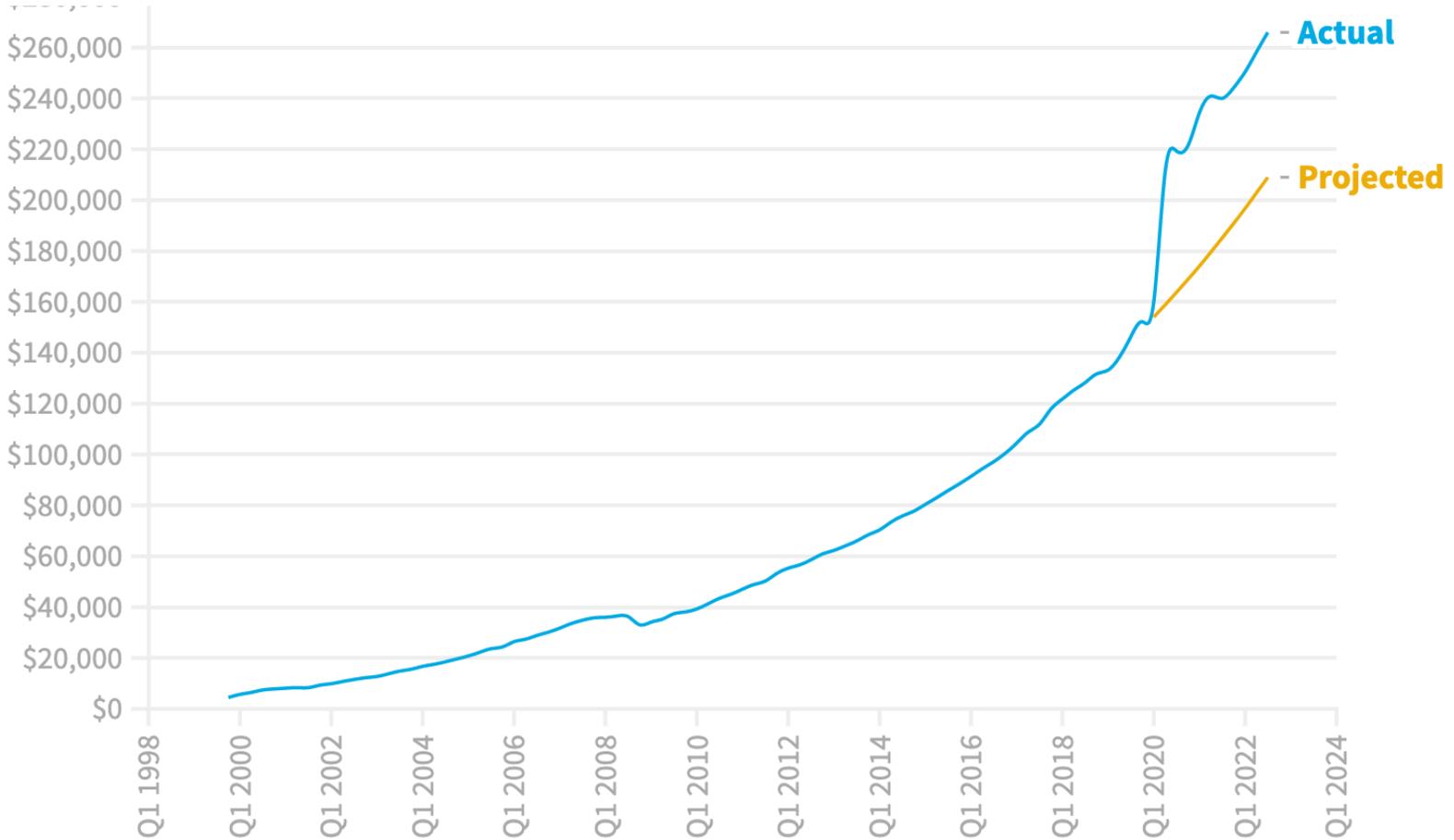
E-Commerce Share of Retail



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

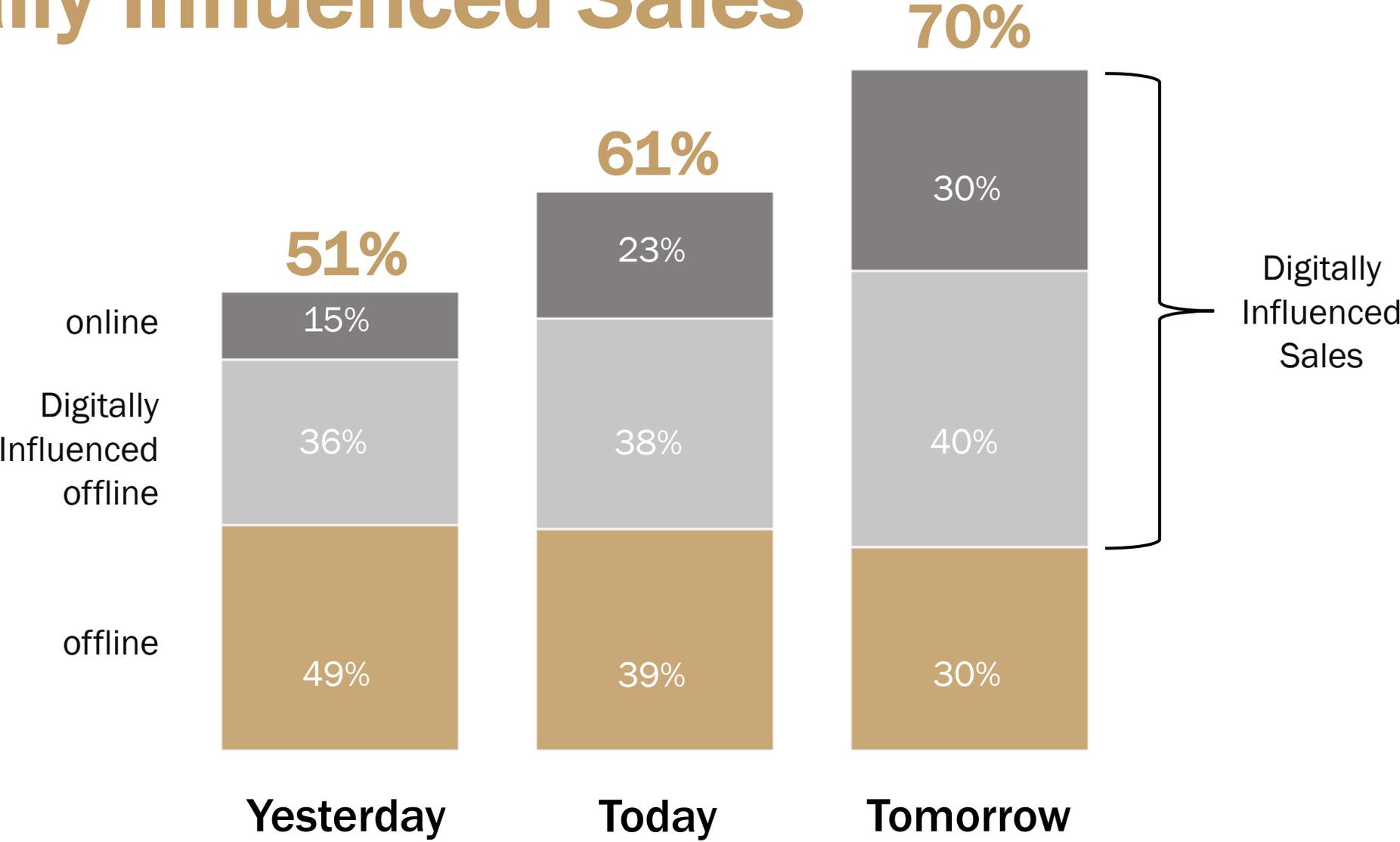


E-Commerce Revenue



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

Digitally Influenced Sales



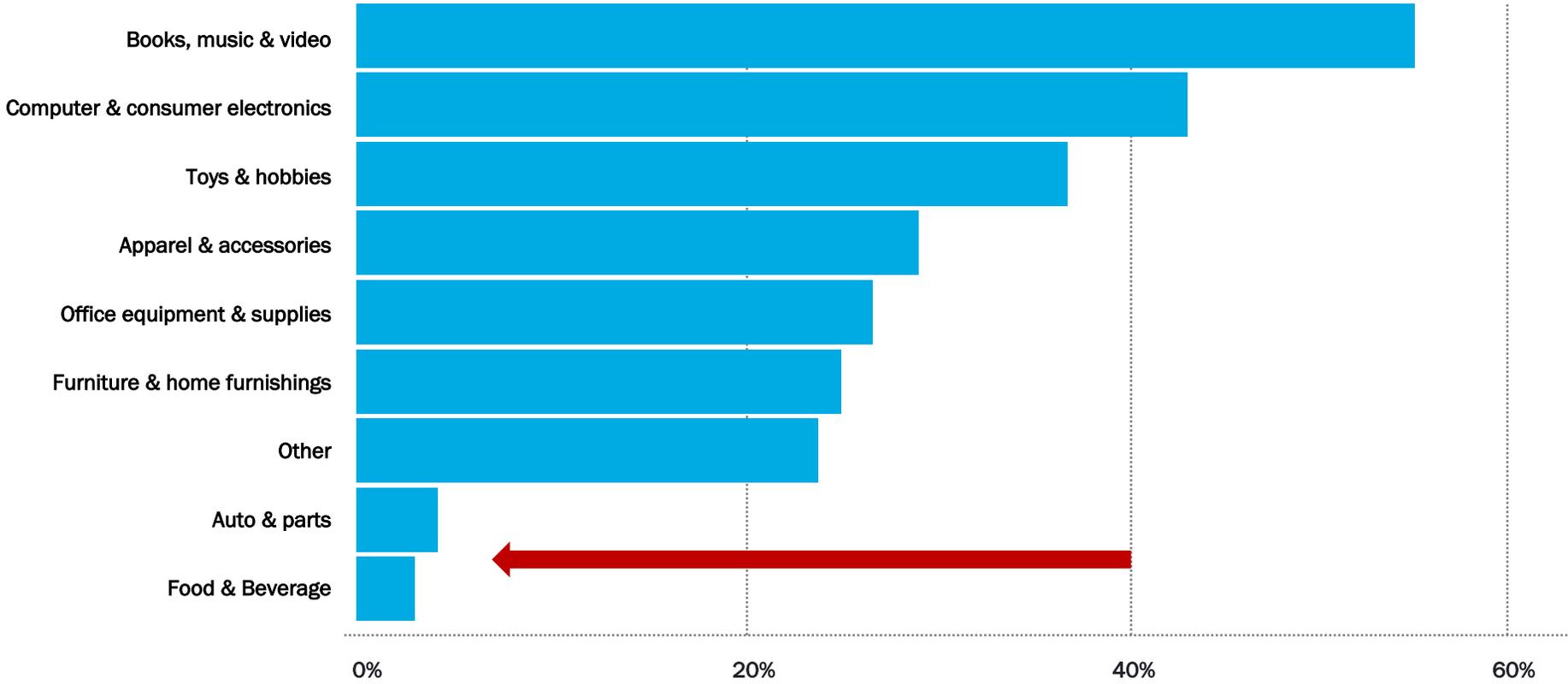
Grocery E-Commerce 2022

\$96.8B

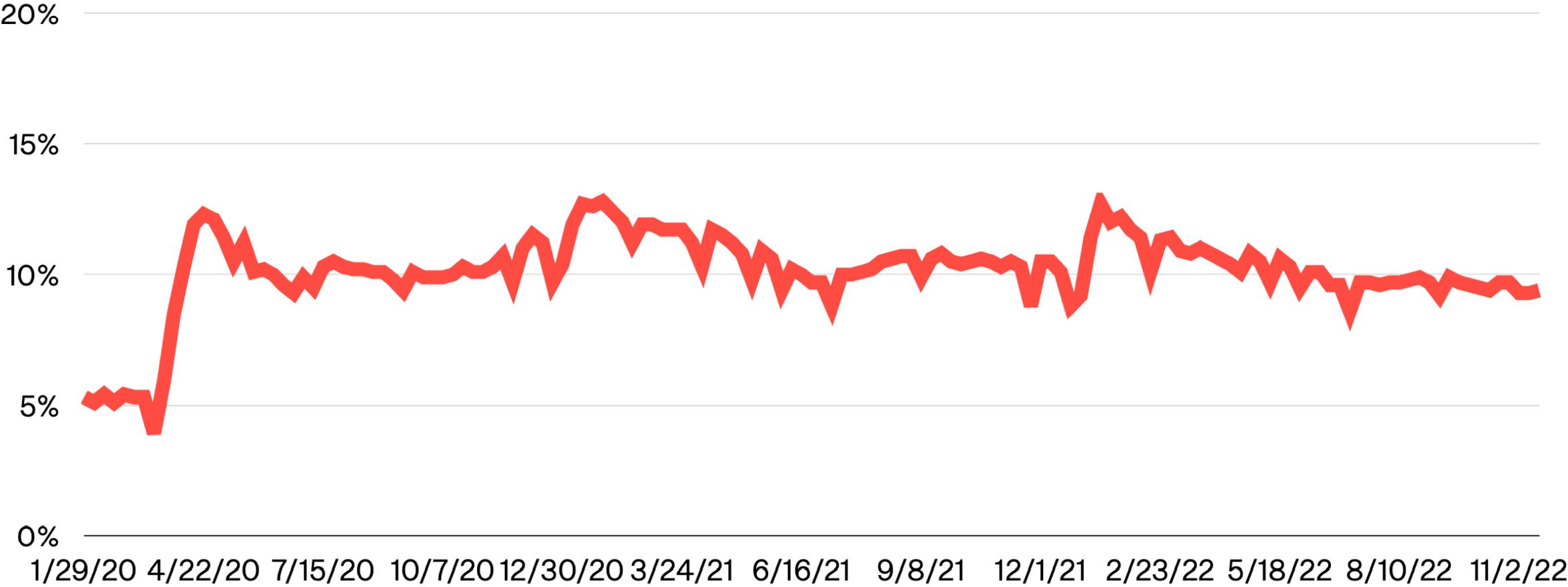
10% of Grocery

Digital Grocery was primed for disruption

Retail Ecommerce Sales Share by Product Category
US 2020 (% of total retail sales)



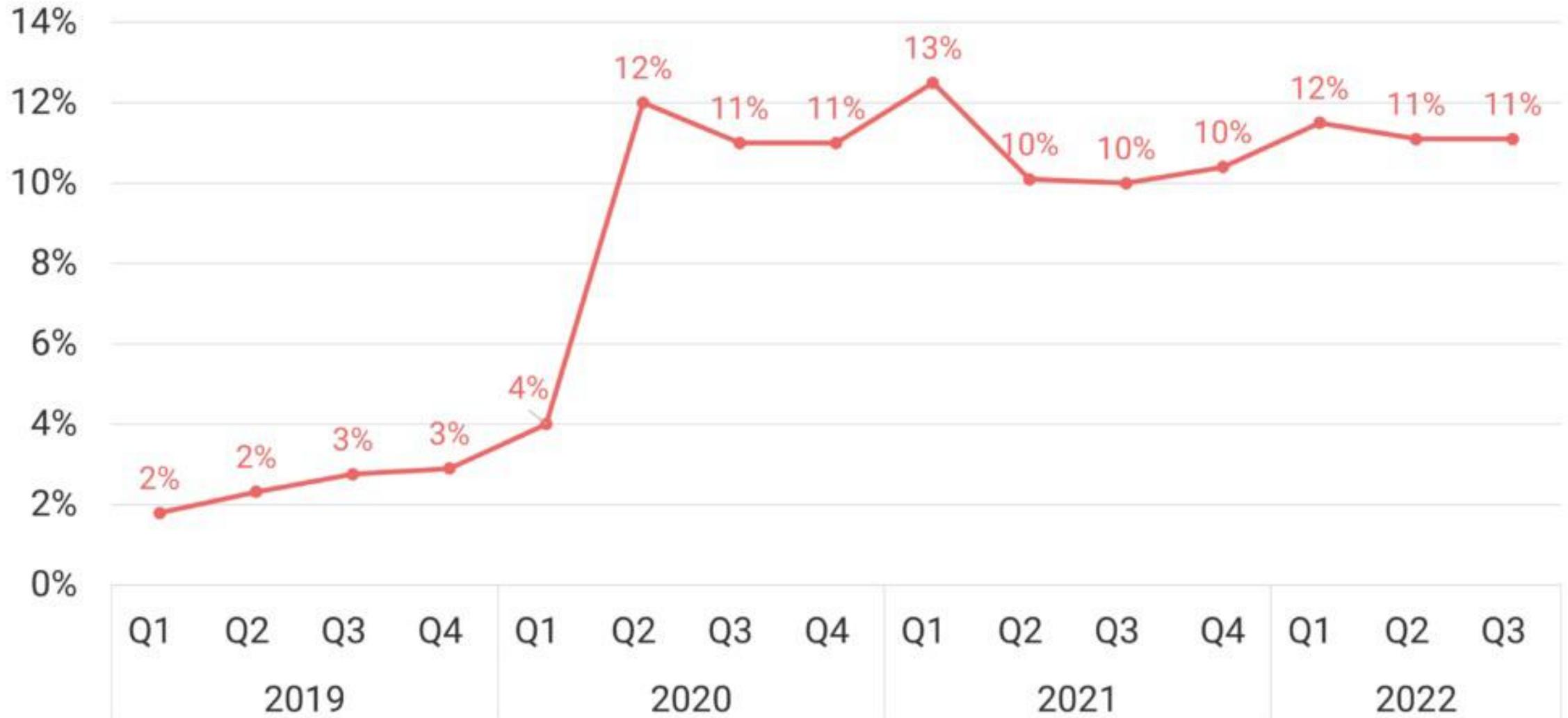
Online share of US grocery spending



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

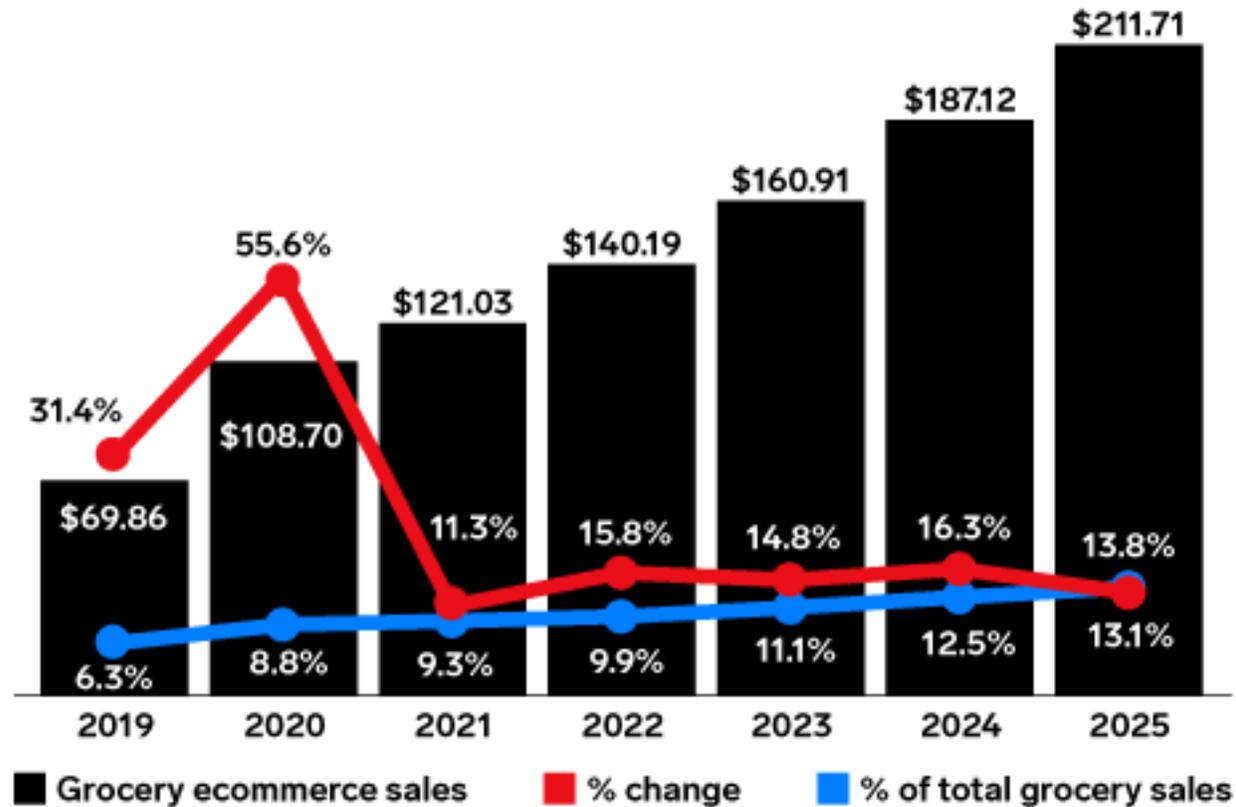


Sprouts Market – Digital Penetration



US Grocery E-Commerce Sales 2019-2025

Billions, % Change, and % of total grocery sales

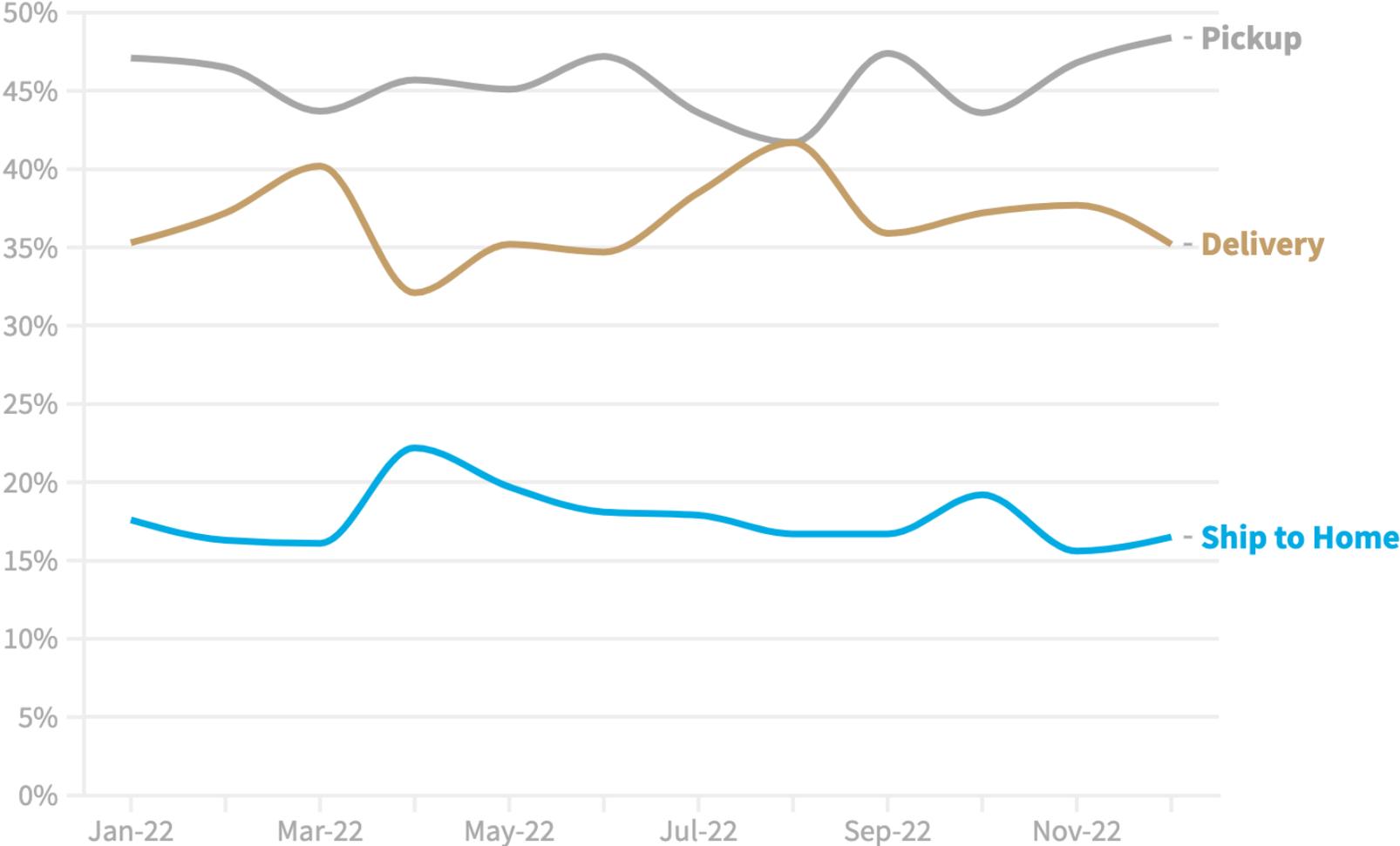


Source: eMarketer Aug 2022

Grocery E-Commerce Delivery Method



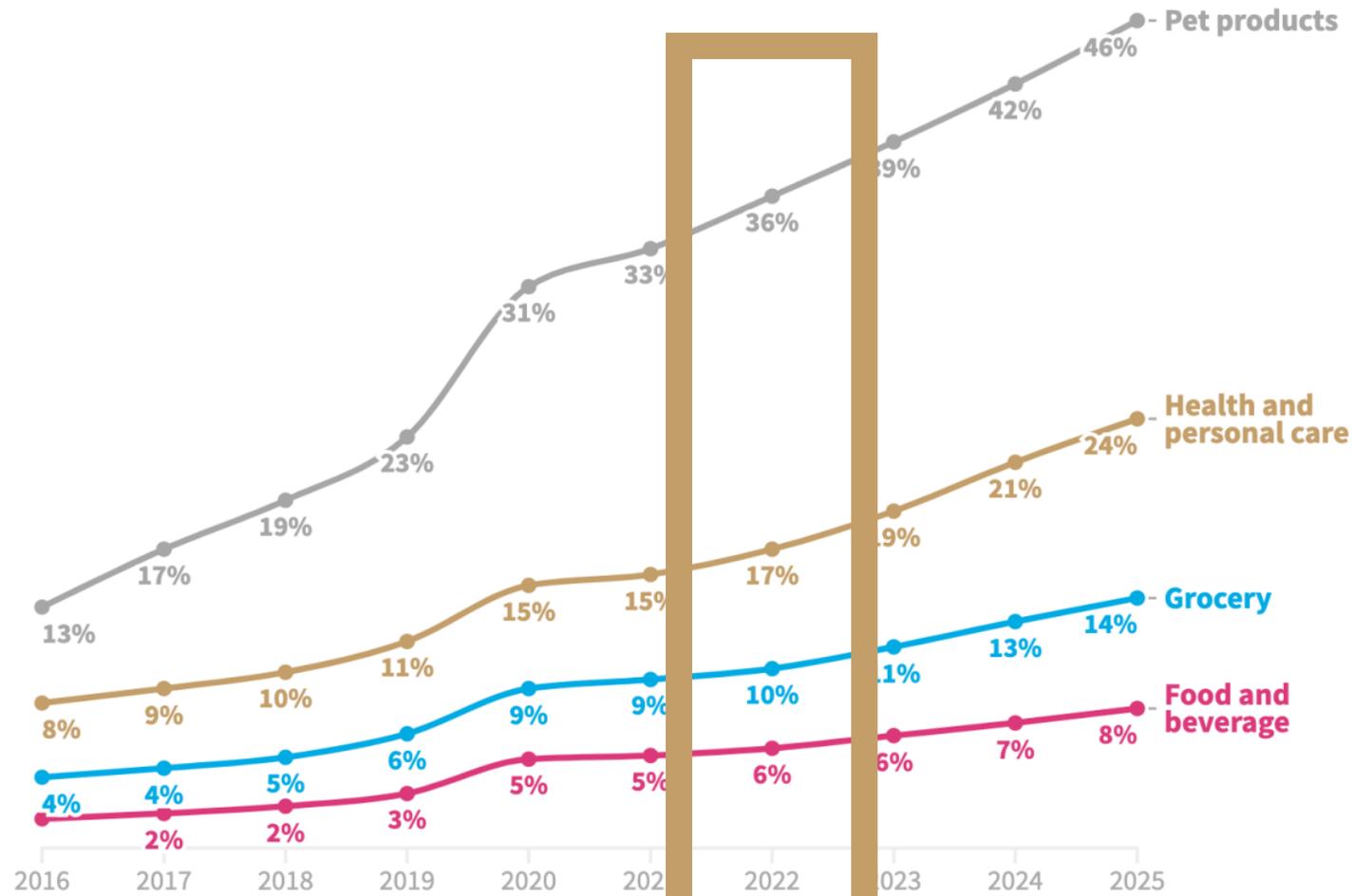
Grocery E-Commerce Delivery Method



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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