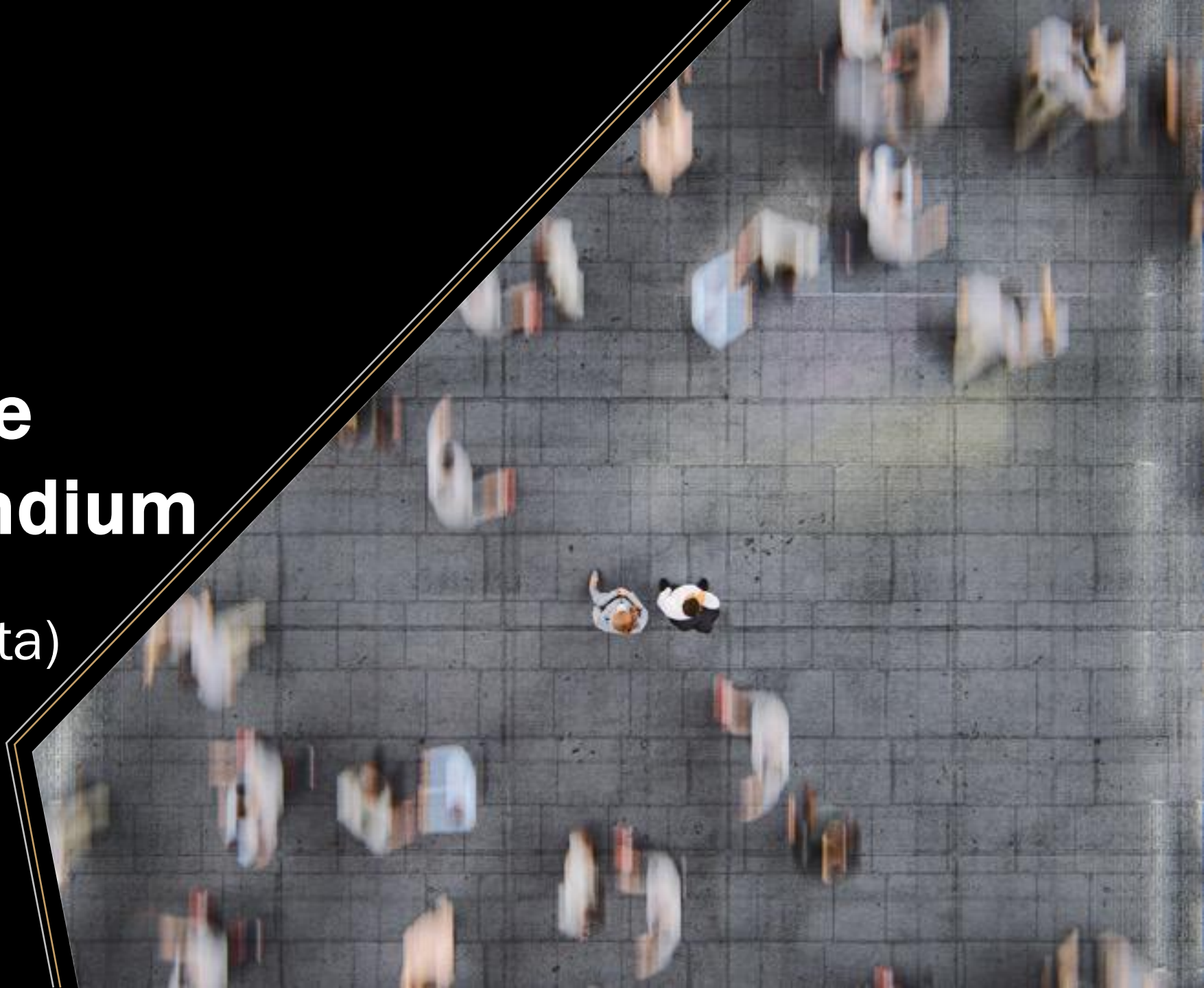




**PUBLICIS  
COMMERCE**

# **US Commerce Data Compendium**

July 2023 (June data)





**2022 Retail**

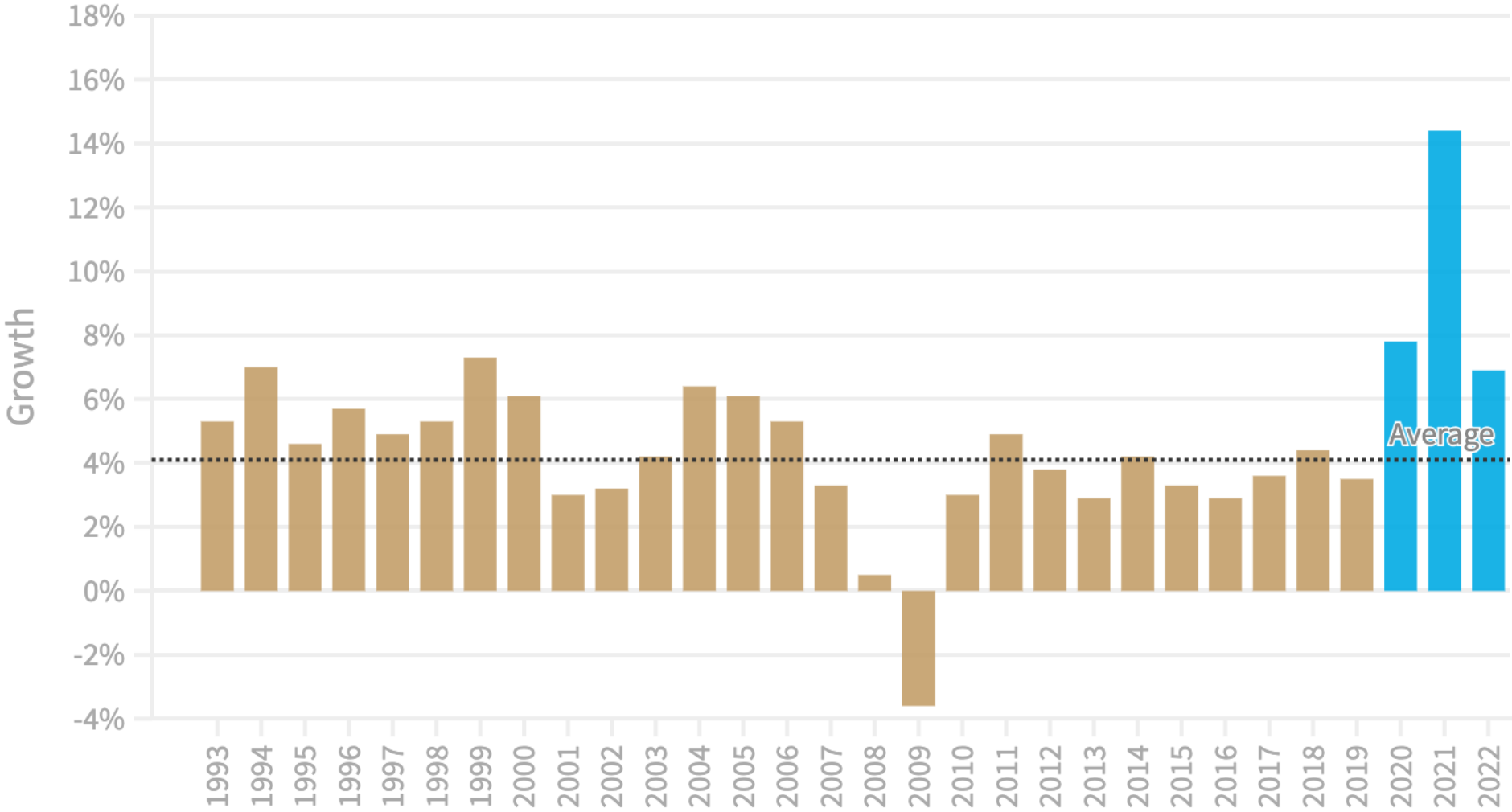
**\$7.1T**

**+8.2% v 2021**

**+31% v 2019**

# Core Retail Growth YoY (ex Auto & Gas)

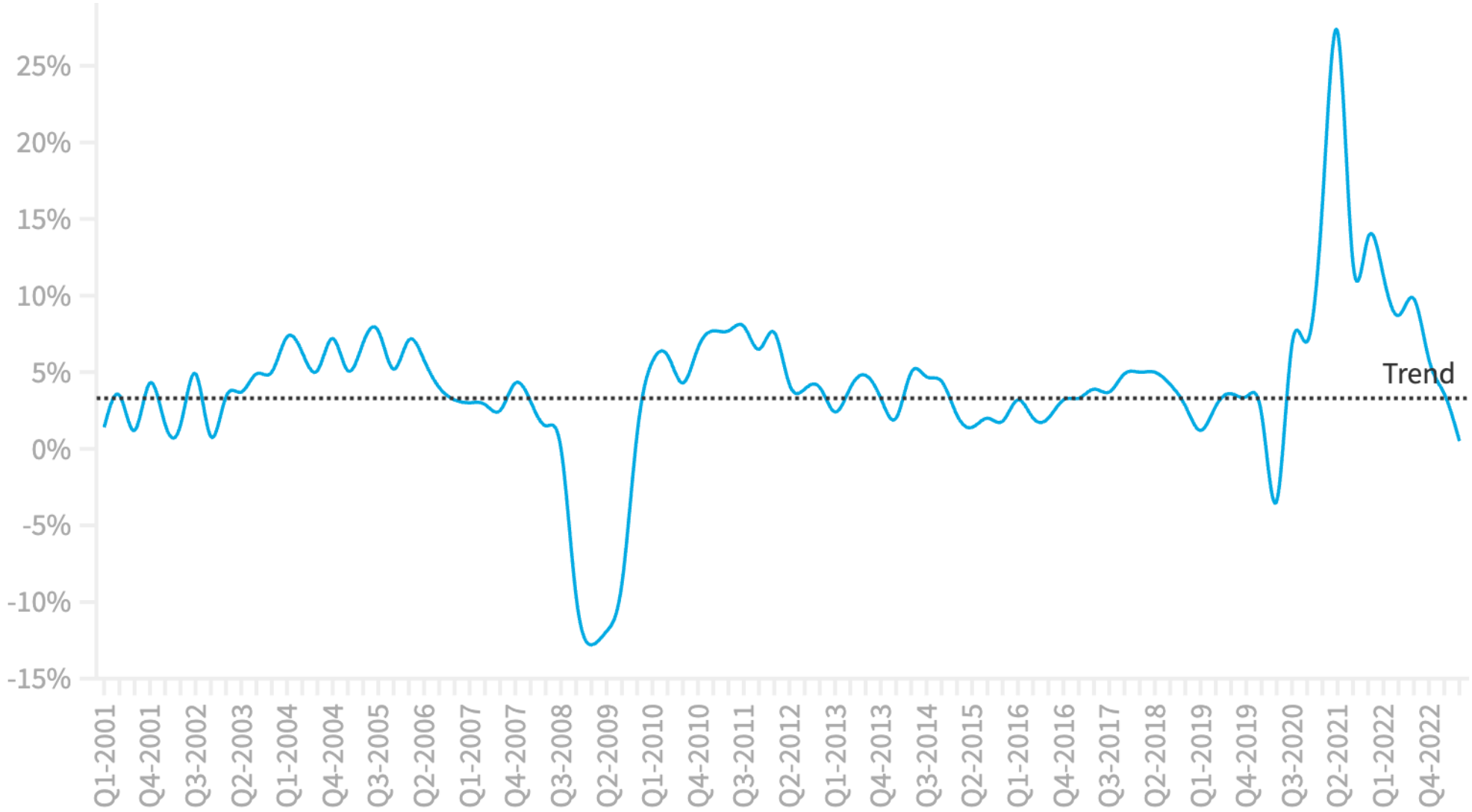
Up 6.9% in 2022  
Up 14.4% in 2021  
Average growth 4.1%



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

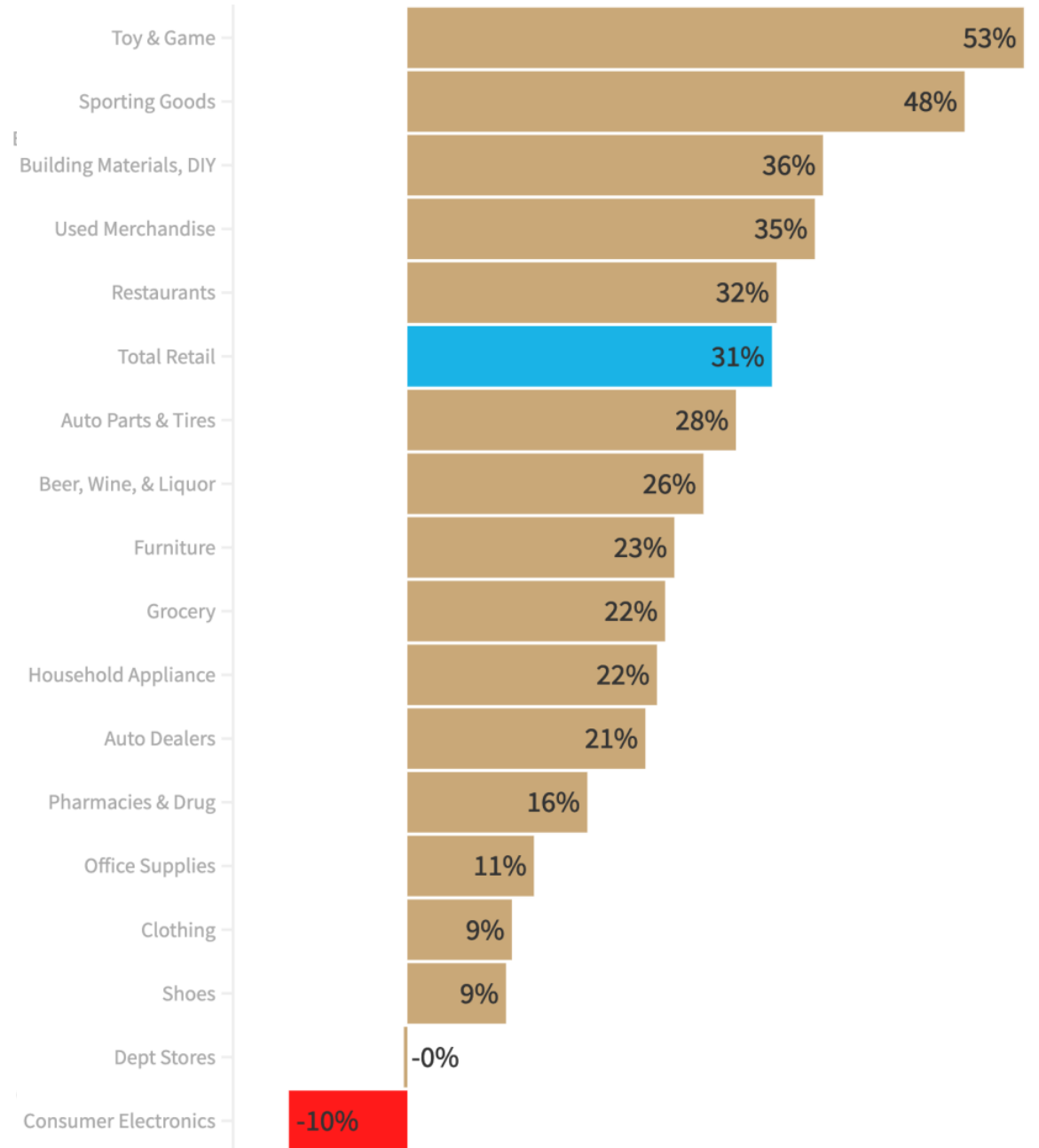


# Retail Quarterly Growth



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

# Detailed Categories 2022 vs 2019



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

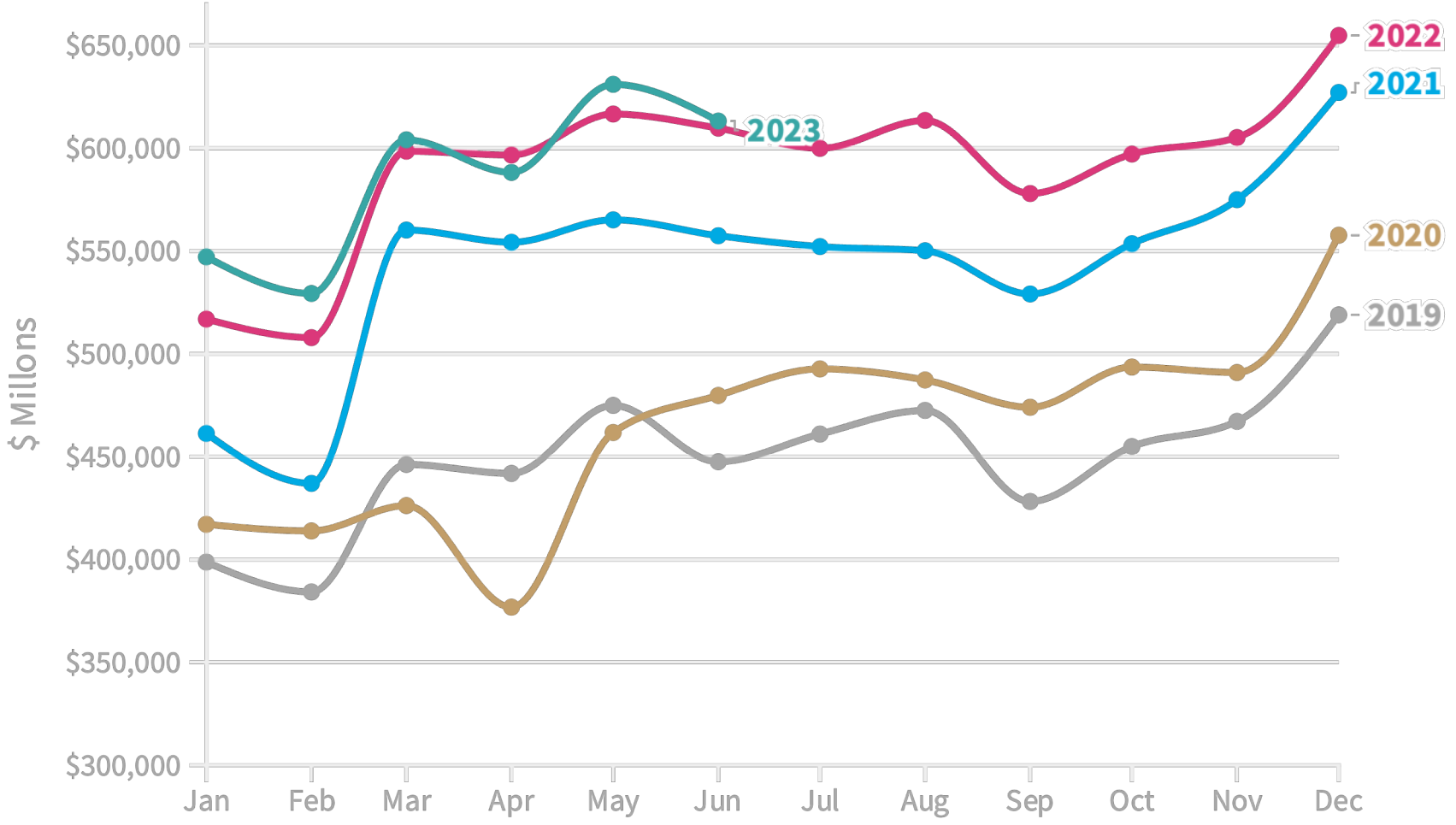


**2023 Retail Jan-Jun**

**\$3.5T**

**+1.9% v 2022**  
**+35.4% v 2019**

# Monthly Retail Sales

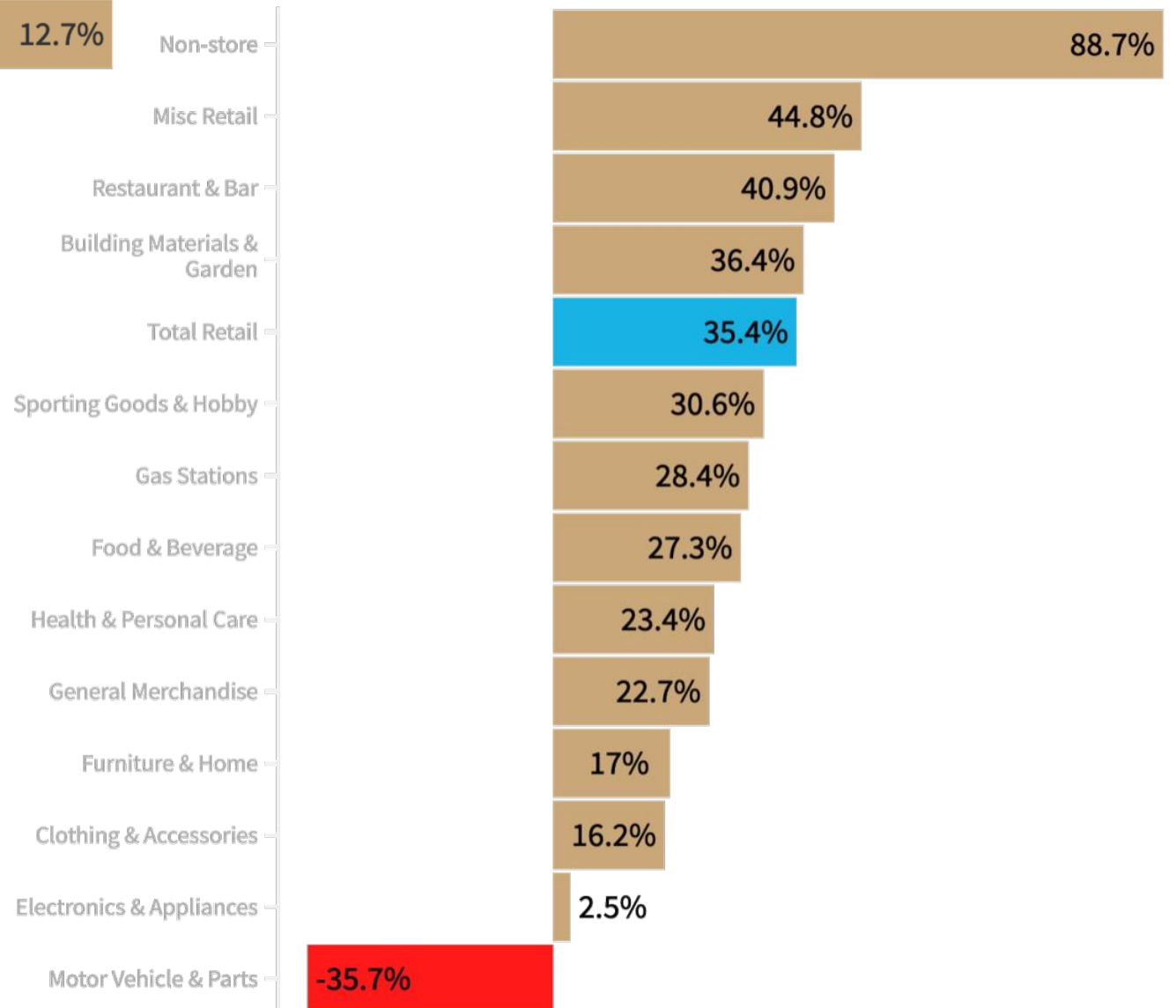
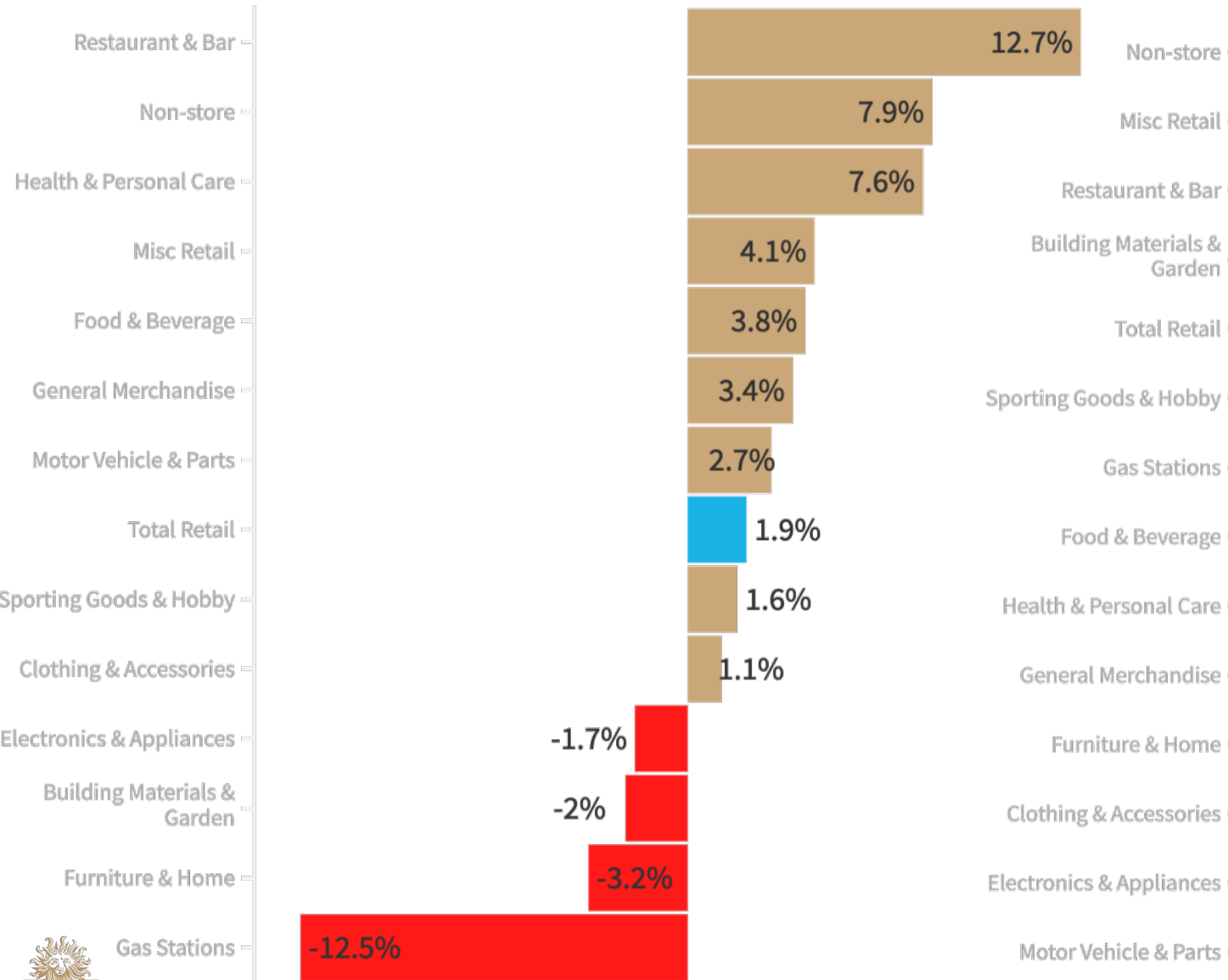


SOURCE: US Dept of Commerce, Economic Indicators Division, Retail Indicator Branch, Adv Monthly. Not Seasonally Adj. Cat 44000



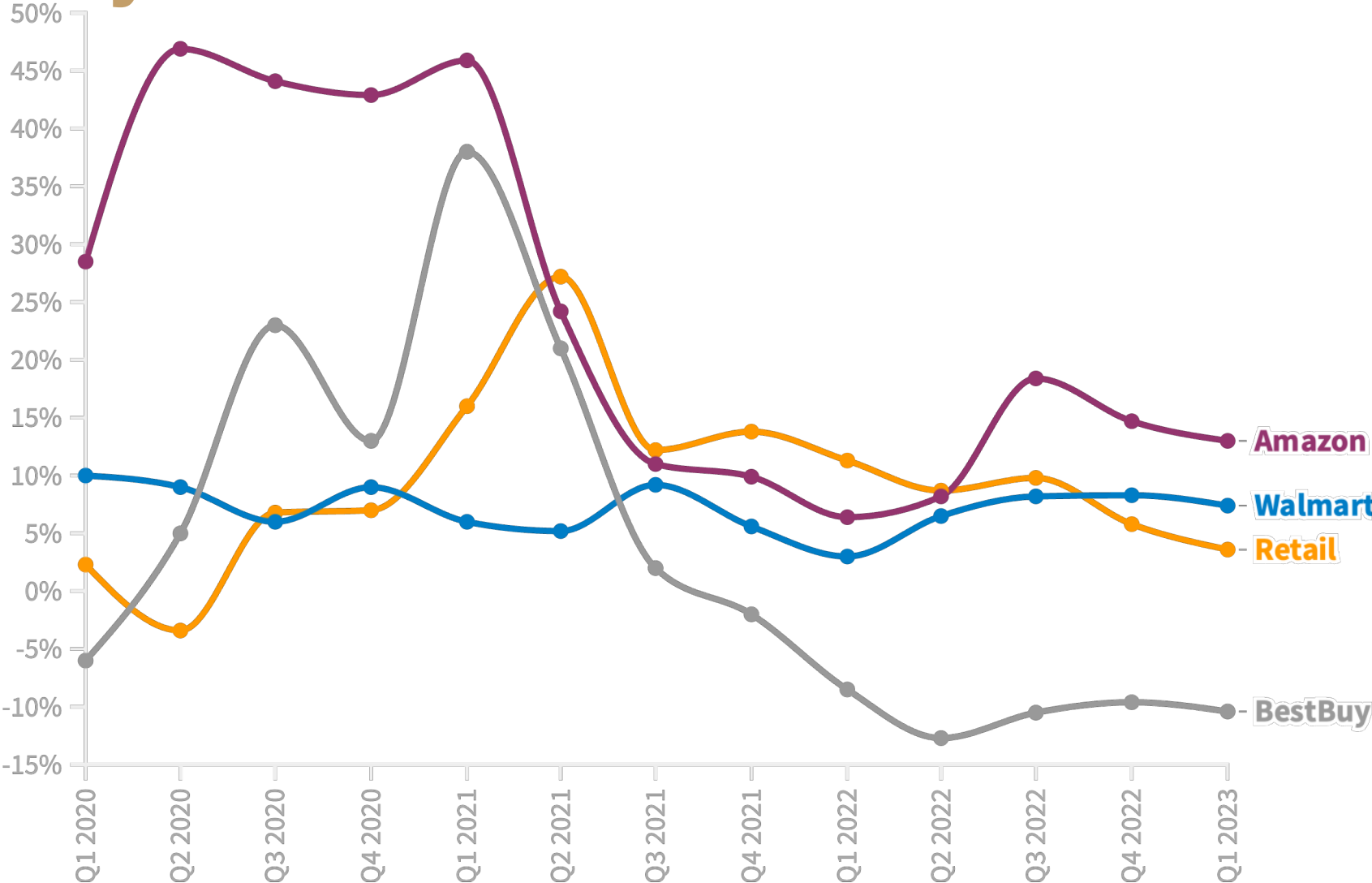
# YTD Sales vs 2022

# YTD Sales vs 2019





# Quarterly Retail Growth



SOURCE: Company Filings, US Dept of Commerce



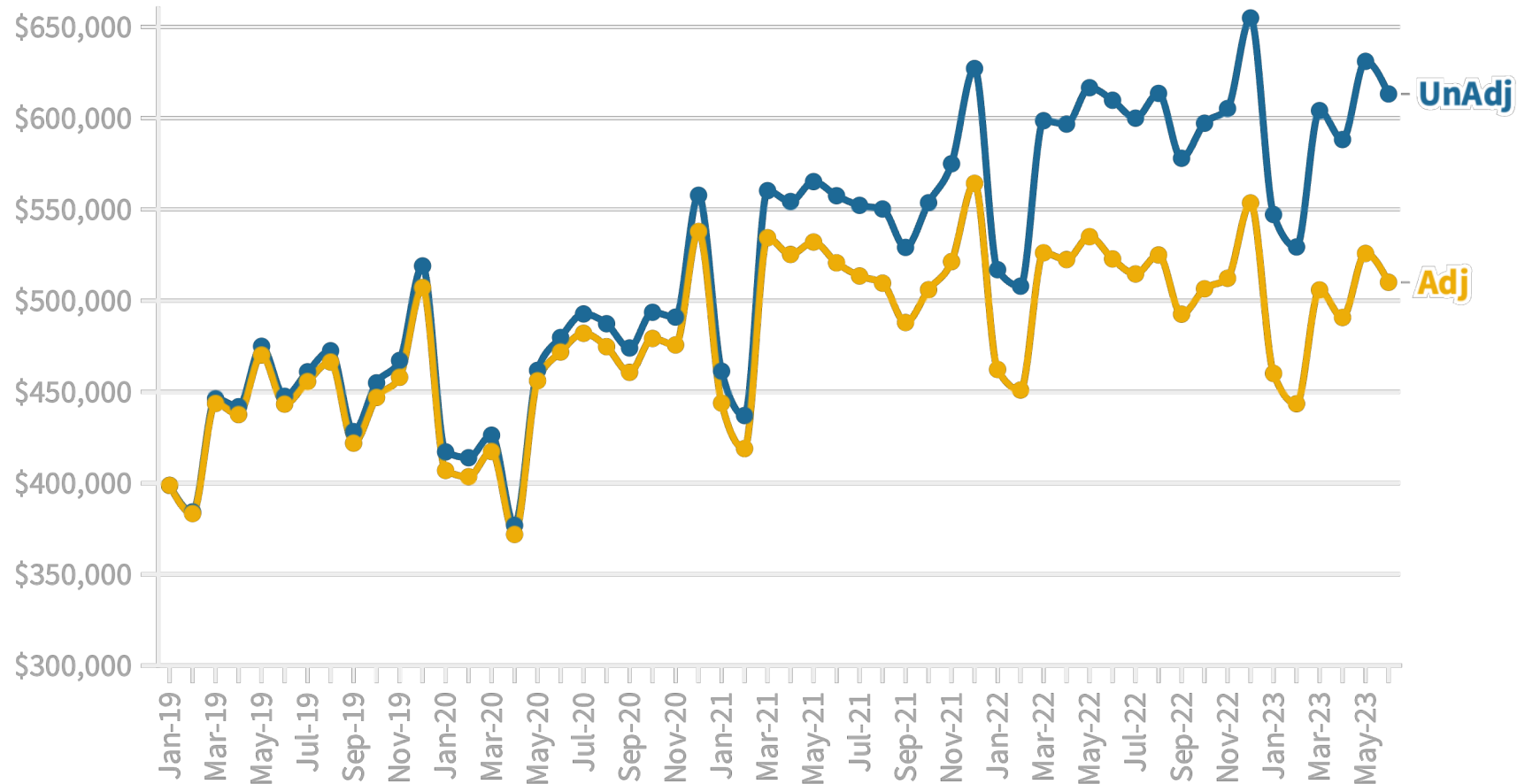
# Inflation (June 2023)

3.0%

2.3% Dec 2019

# US Retail Sales Adjusted for inflation

YTD Up 1.9% (-2.8% adjusted) YoY  
Up 35.4% (19.3% adjusted) Yo4Y



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

**2023 Automobile Jan - June**

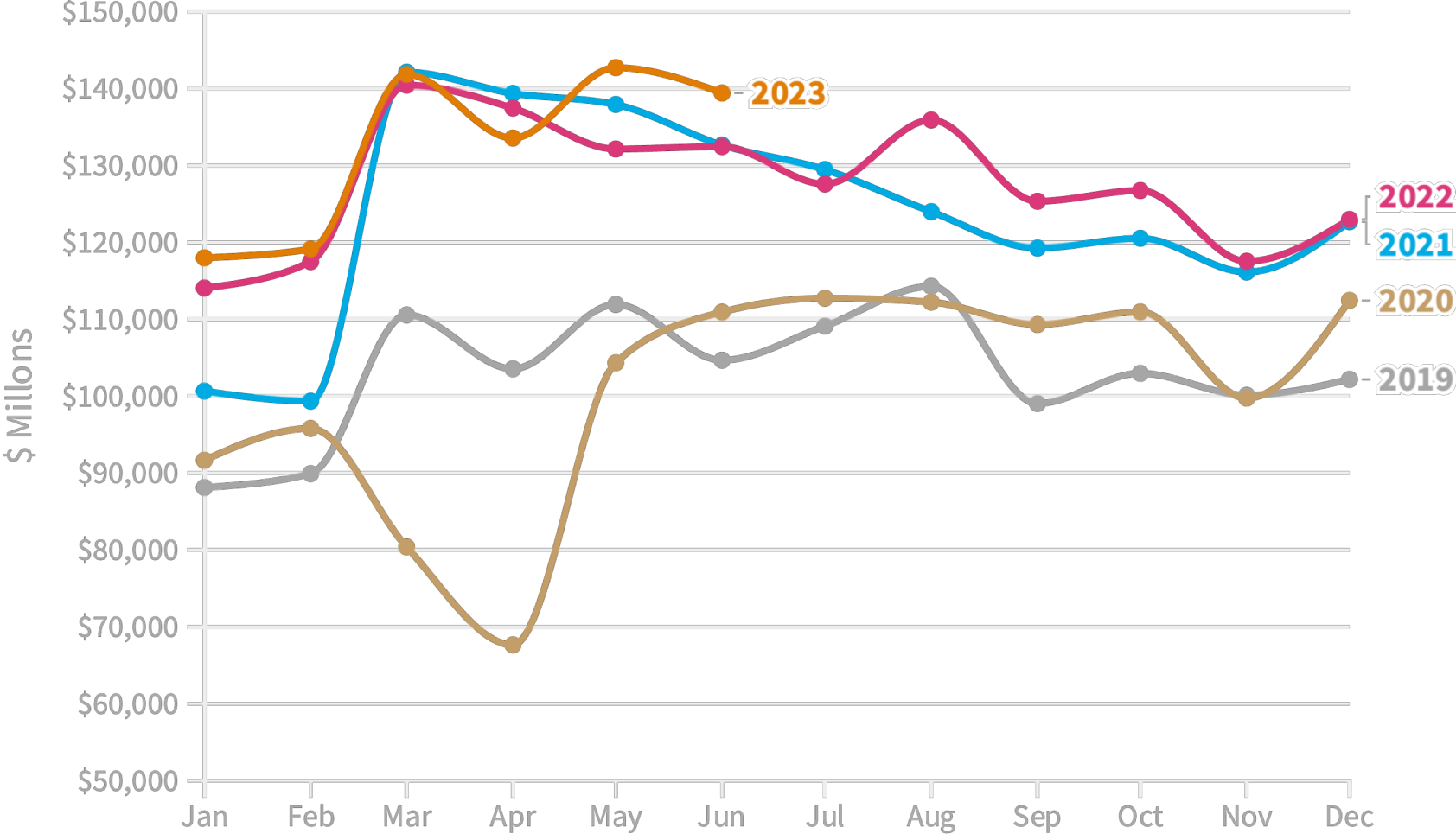
**\$794B**

**+2.7% v 2022**

**+30.5% v 2019**

**23% 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

\$961B

+8.1% v 2021

+24.2% v 2019

24% of Retail

2023 Grocery Jan - June

**\$481B**

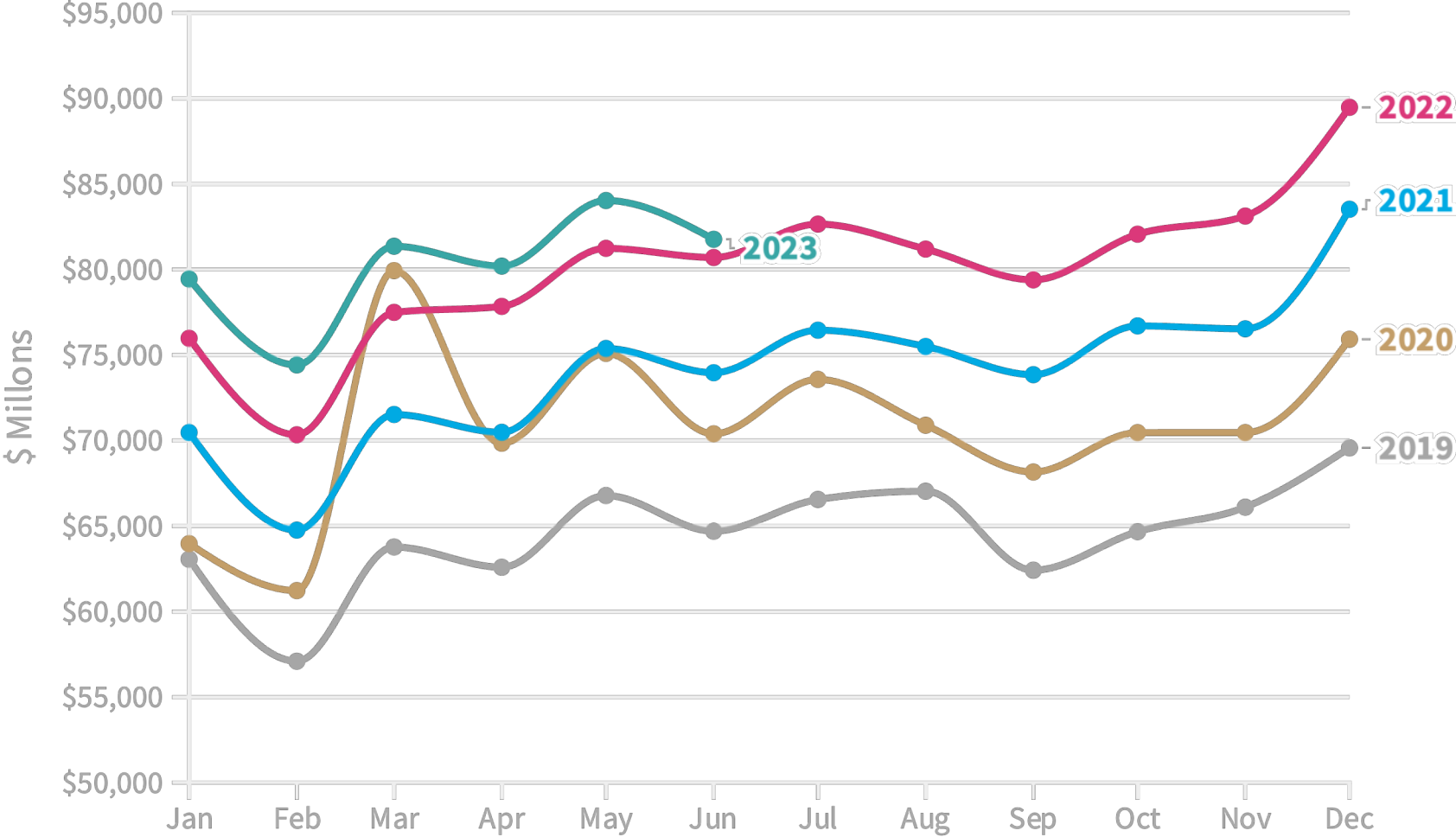
+3.8% v 2022

+27.3% v 2019

14% of Retail



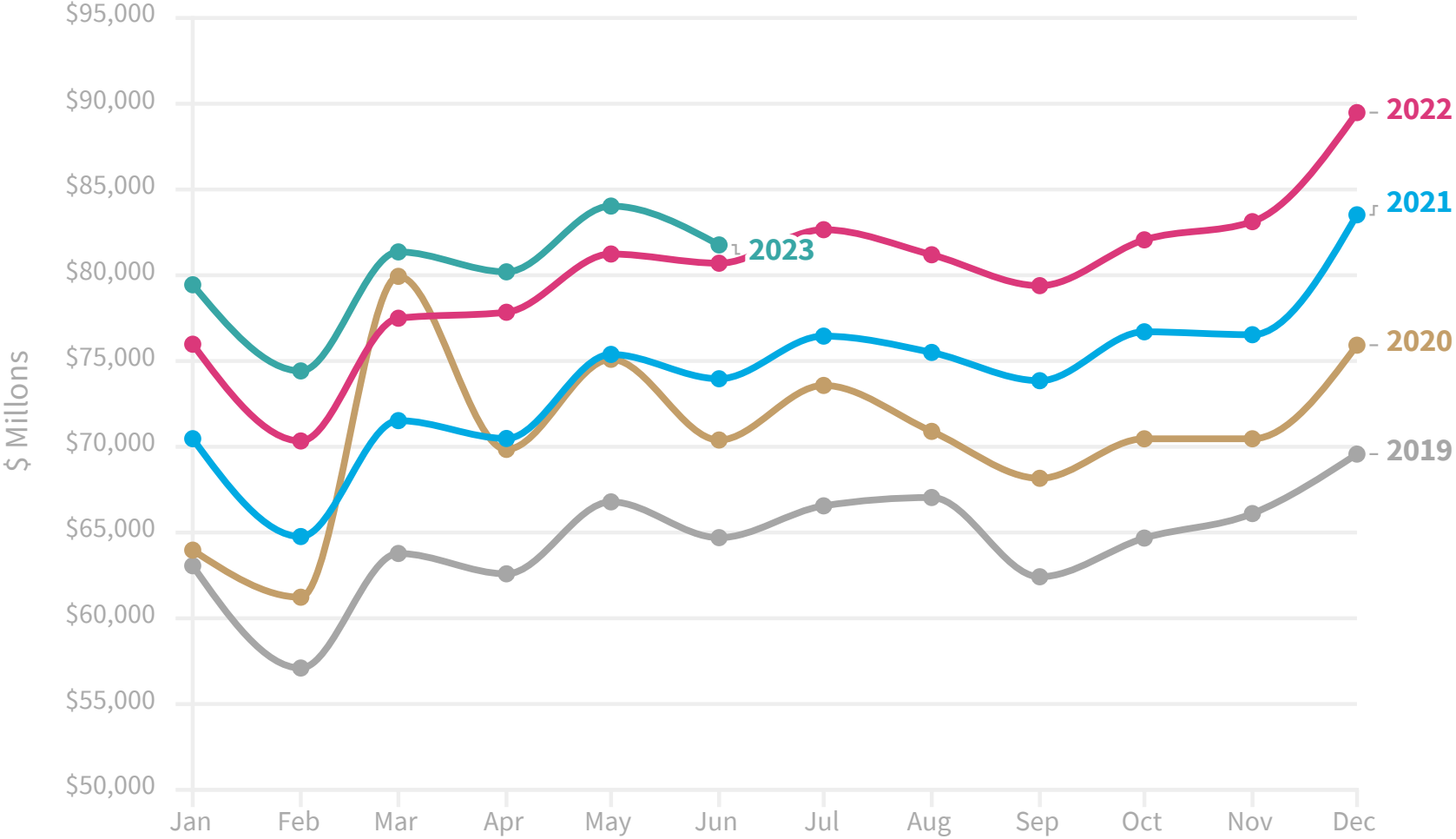
# Monthly Grocery Sales



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



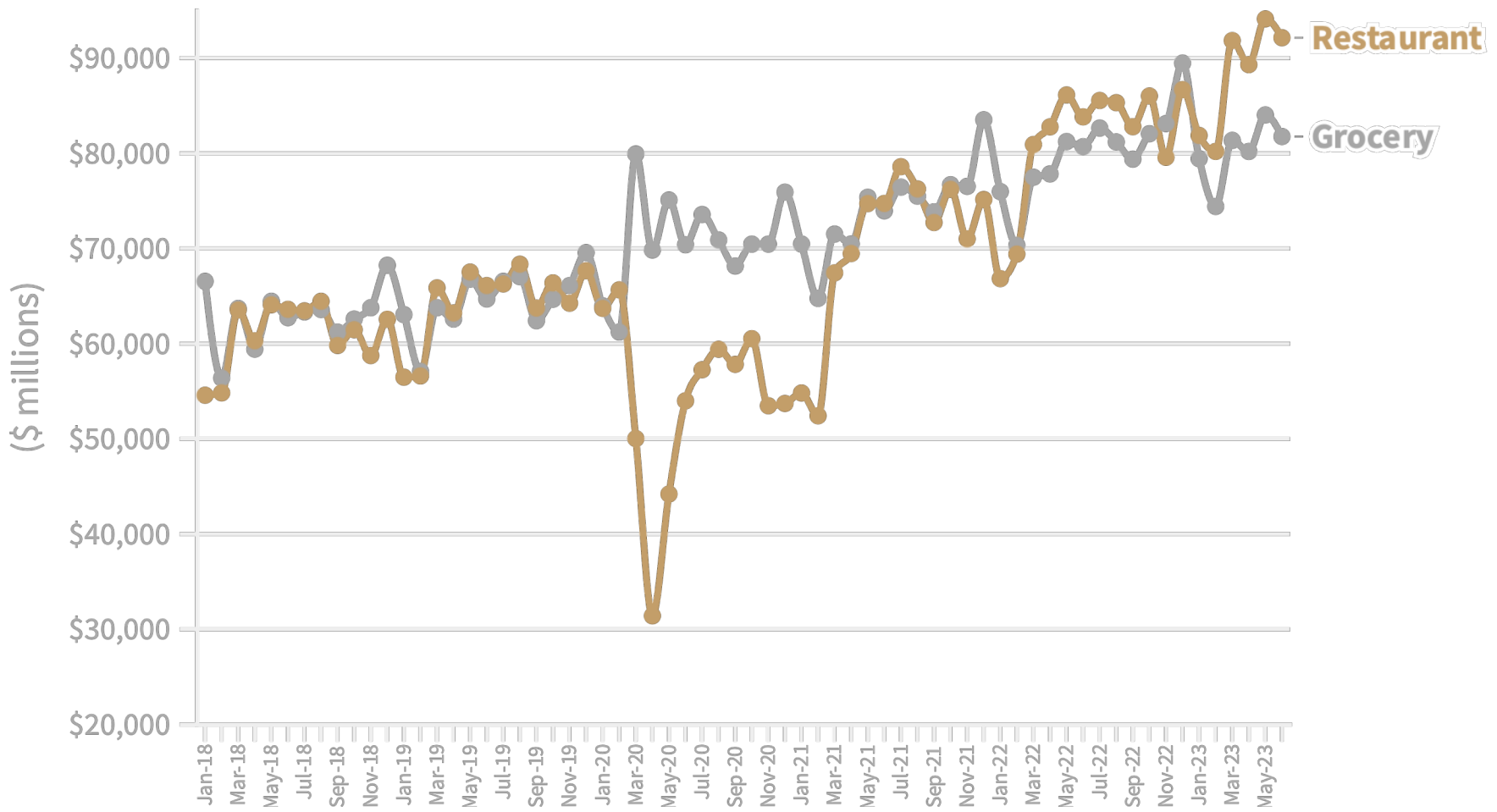
# Monthly Grocery Sales



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



# Restaurant vs Grocery

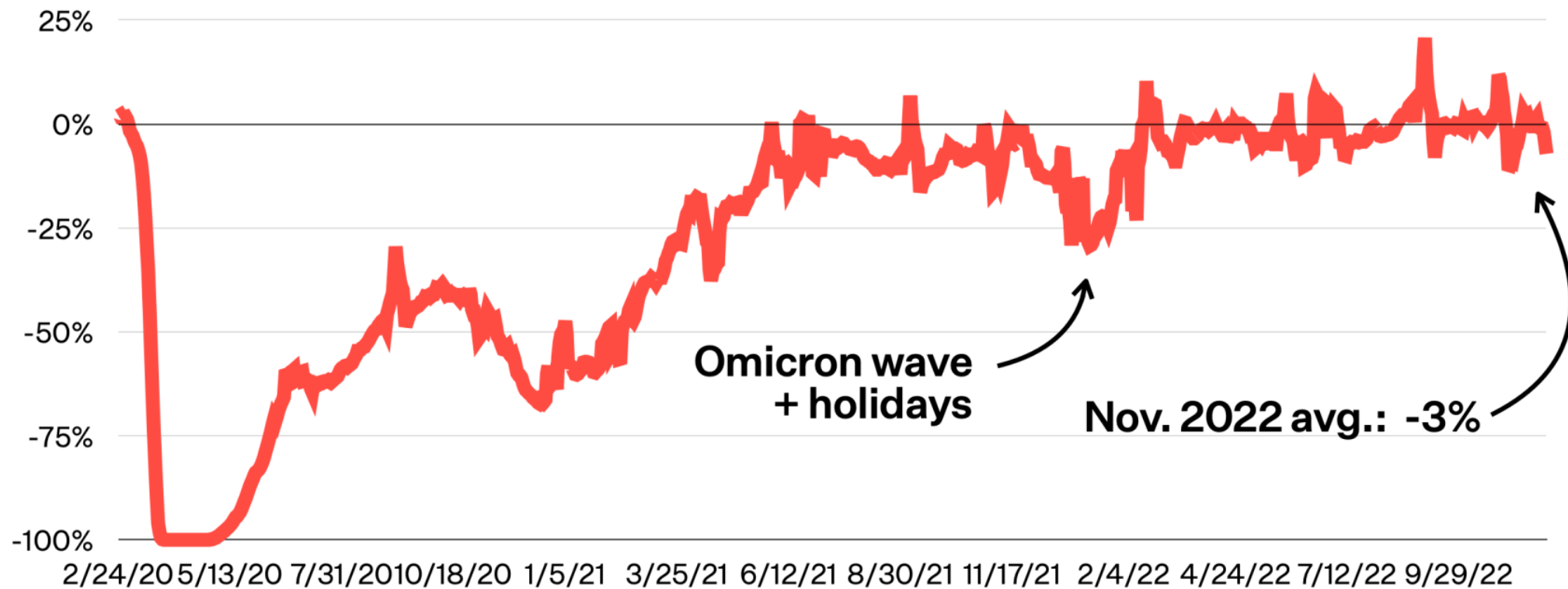


SOURCE: US Dept of Commerce, Economic Indicators Division, Retail Indicator Branch, Adv Monthly, Not Seasonally Adj. Cat 445 vs. 772



# Restaurants Back to Normal

OpenTable seated diners change vs. 2019 'normal'

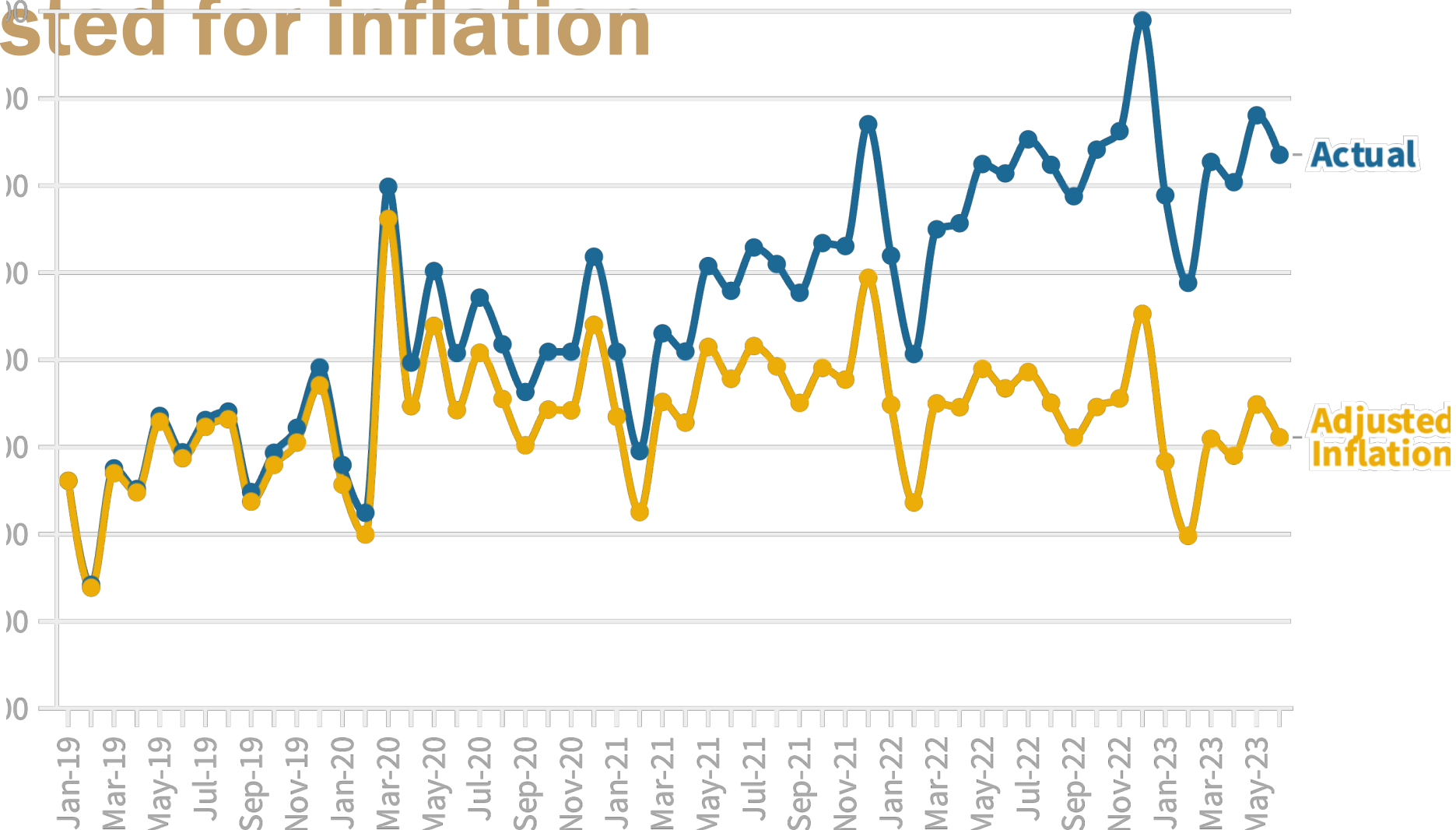


SOURCE: OpenTable. 7-day average, same weekday via The New Consumer

# US Grocery Sales

YTD Up 3.8% (-3.7% adjusted) YoY  
 Up 27.3% (32.7% adjusted) Yo4Y

## Adjusted for inflation



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

**2023 Apparel Jan - June**

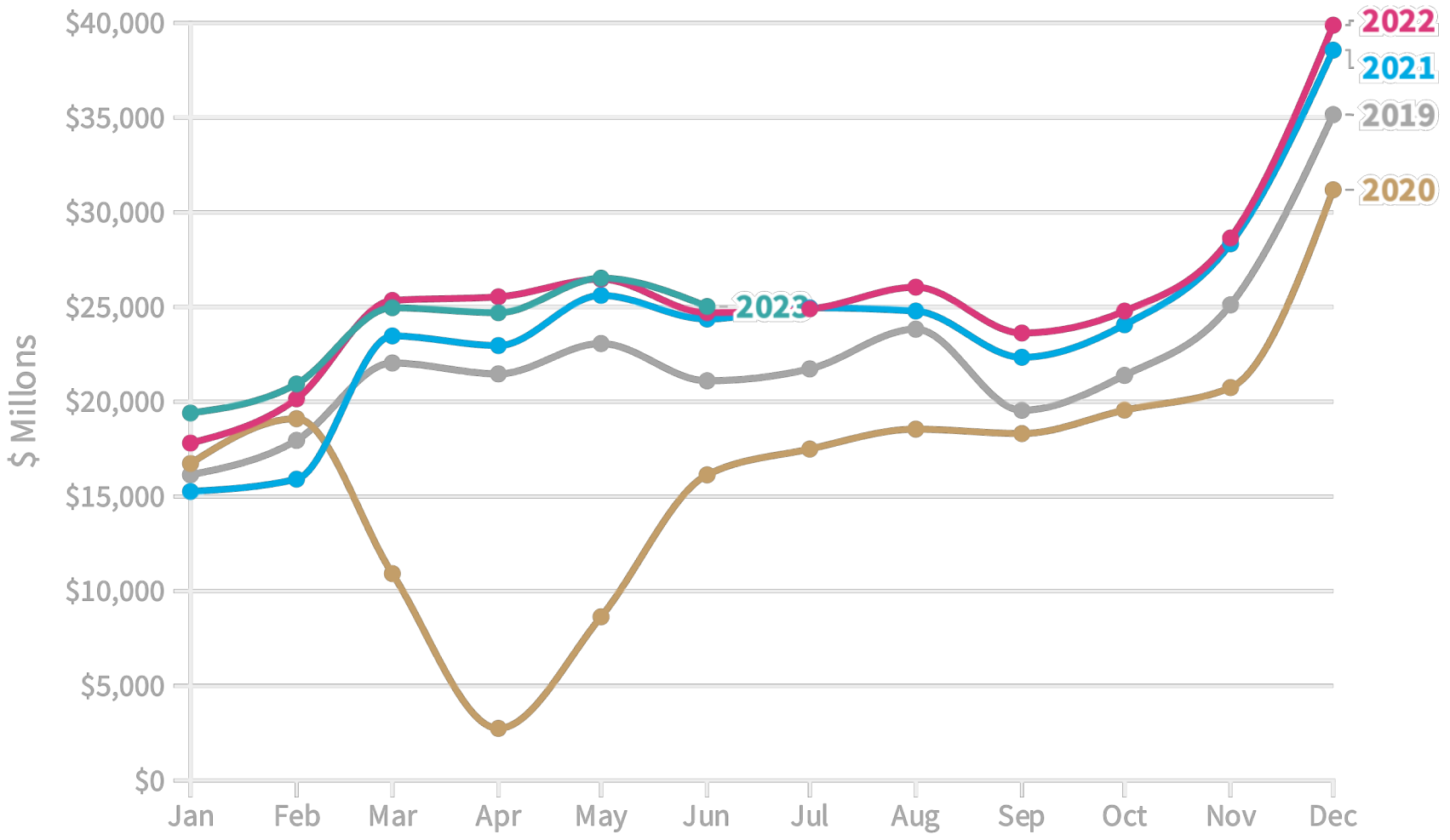
**\$142B**

**+1.1% v 2022**

**+16.2% v 2019**

**4% of Retail**

# Monthly US Apparel Sales

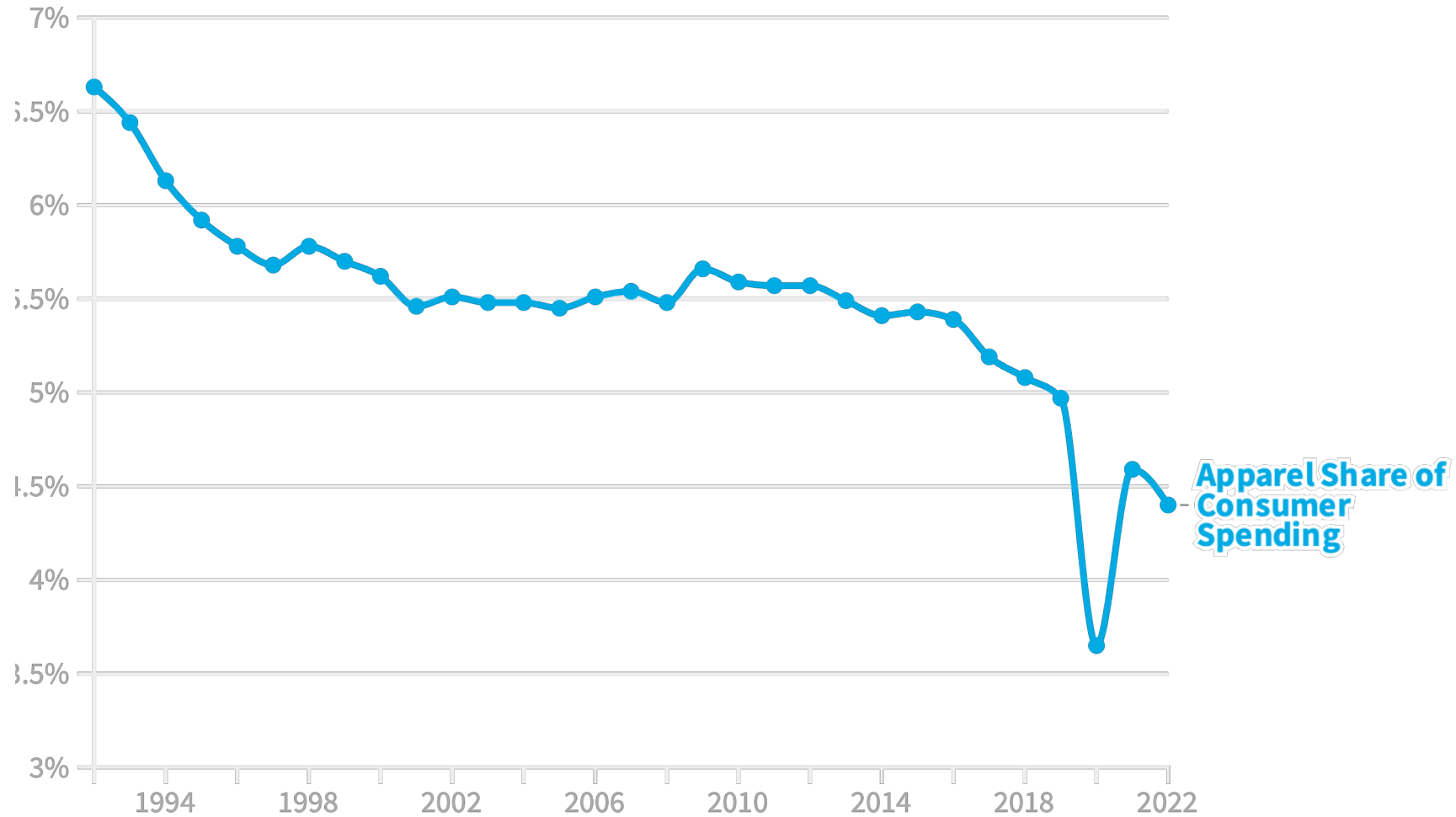


SOURCE: US Dept of Commerce, Economic Indicators Division, Retail Indicator Branch, Adv Monthly, Not Seasonally Adj. Cat 448





# 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

# \$509B

+6.7% v 2021

+37% v 2019

7% of Retail



# 2023 DIY / Home Improvement Jan-June

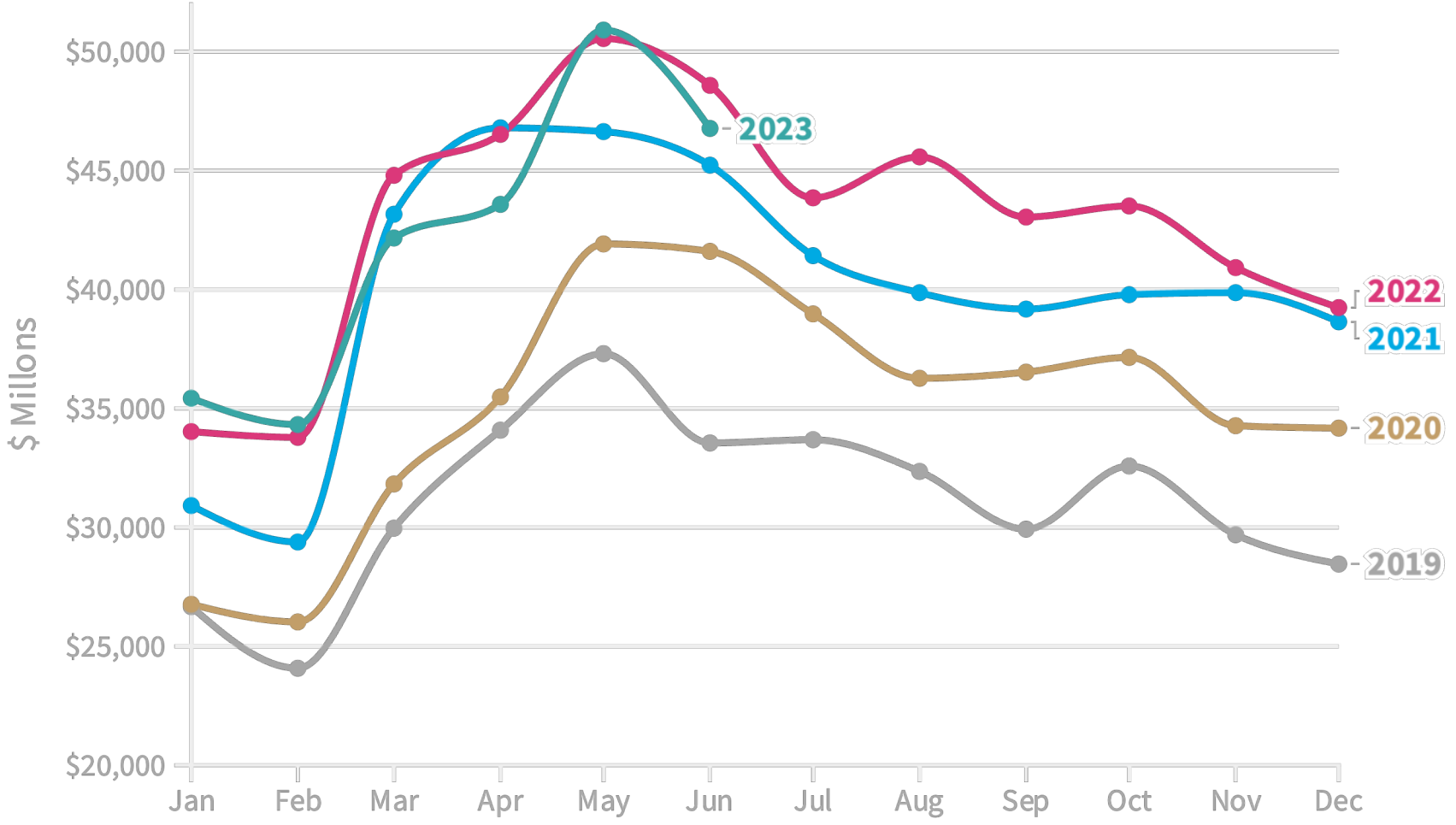
# \$253 B

-2% v 2022

+36.4% v 2019

7% of Retail

# 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

**\$87B**

-7.6% v 2021

-4% v 2019

1.2% of Retail

# 2023 Electronics Jan - June

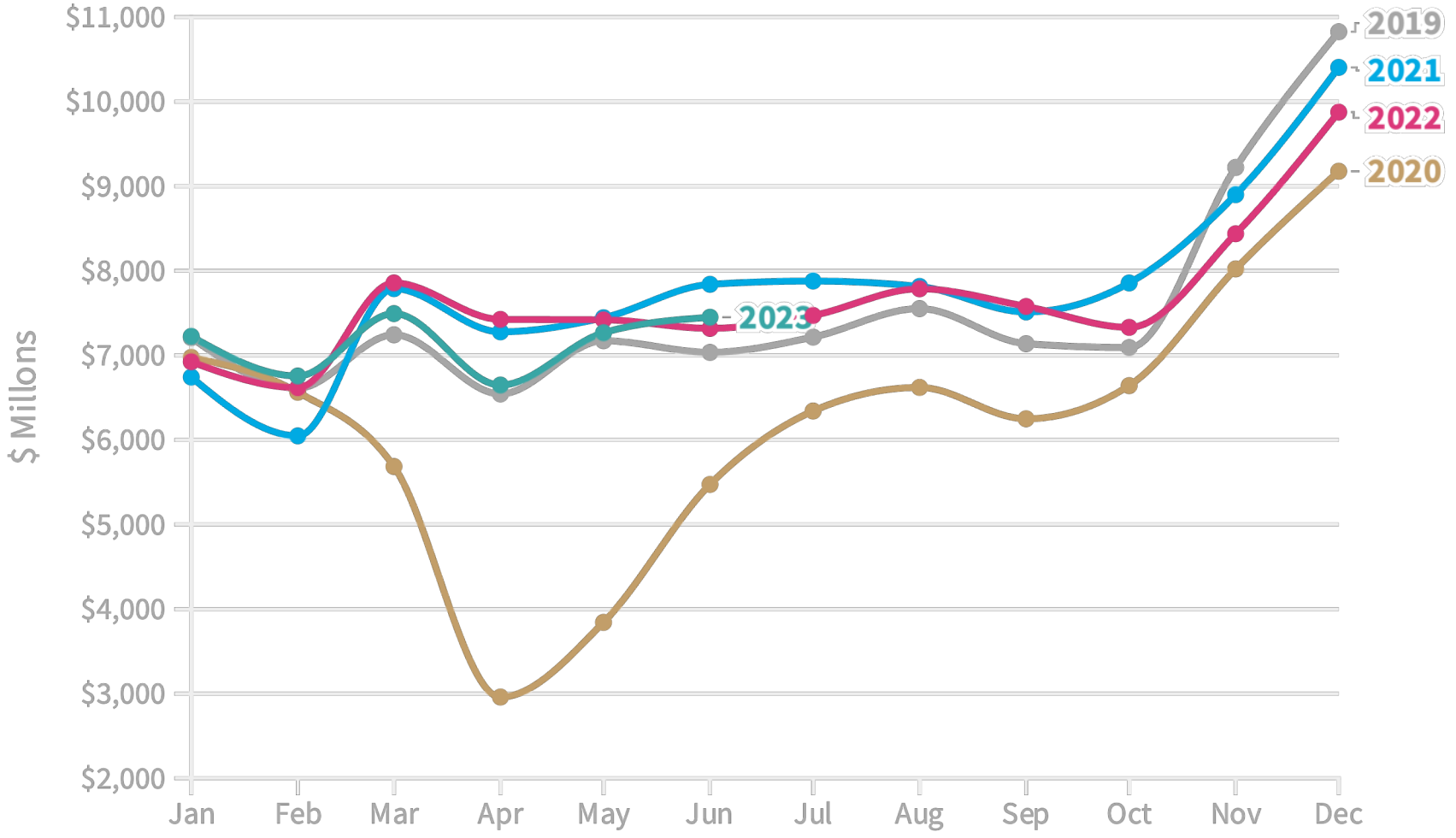
# \$43B

-1.7% v 2022

2.5% 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

**\$24B**

+6.4% v 2021

+53% v 2019



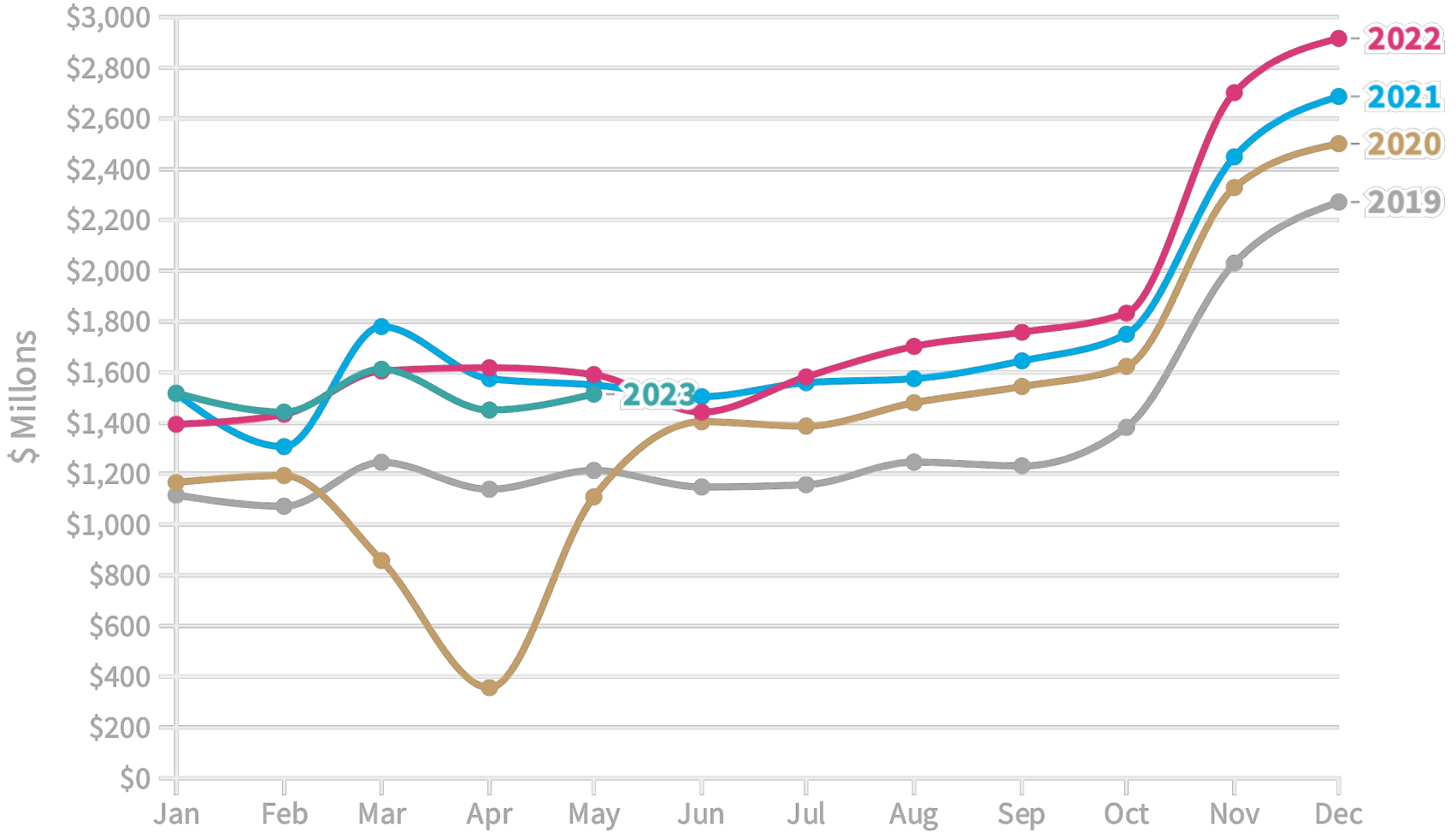
# 2023 Toys Jan-May

**\$7.5B**

-1.4% v 2022

+30% 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

**\$1T**

**14.6% of US Retail**

**+8% v 2021**

**+27% v 2020**

**+81% v 2019**

# 2023 Non-Store Sales Jan-June

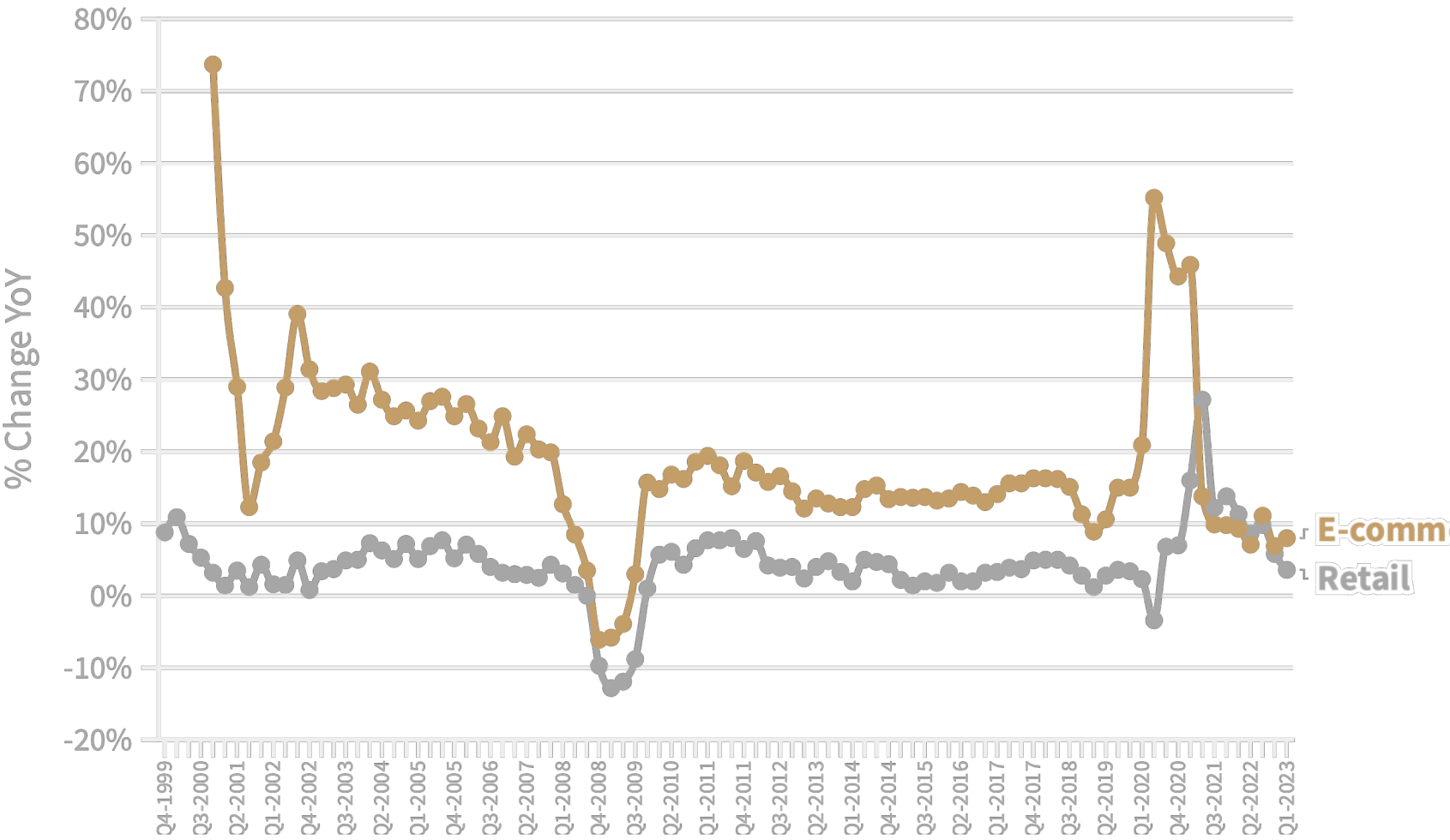
# \$650B

+7.9% v 2022

+89% v 2019

18.5% of Retail

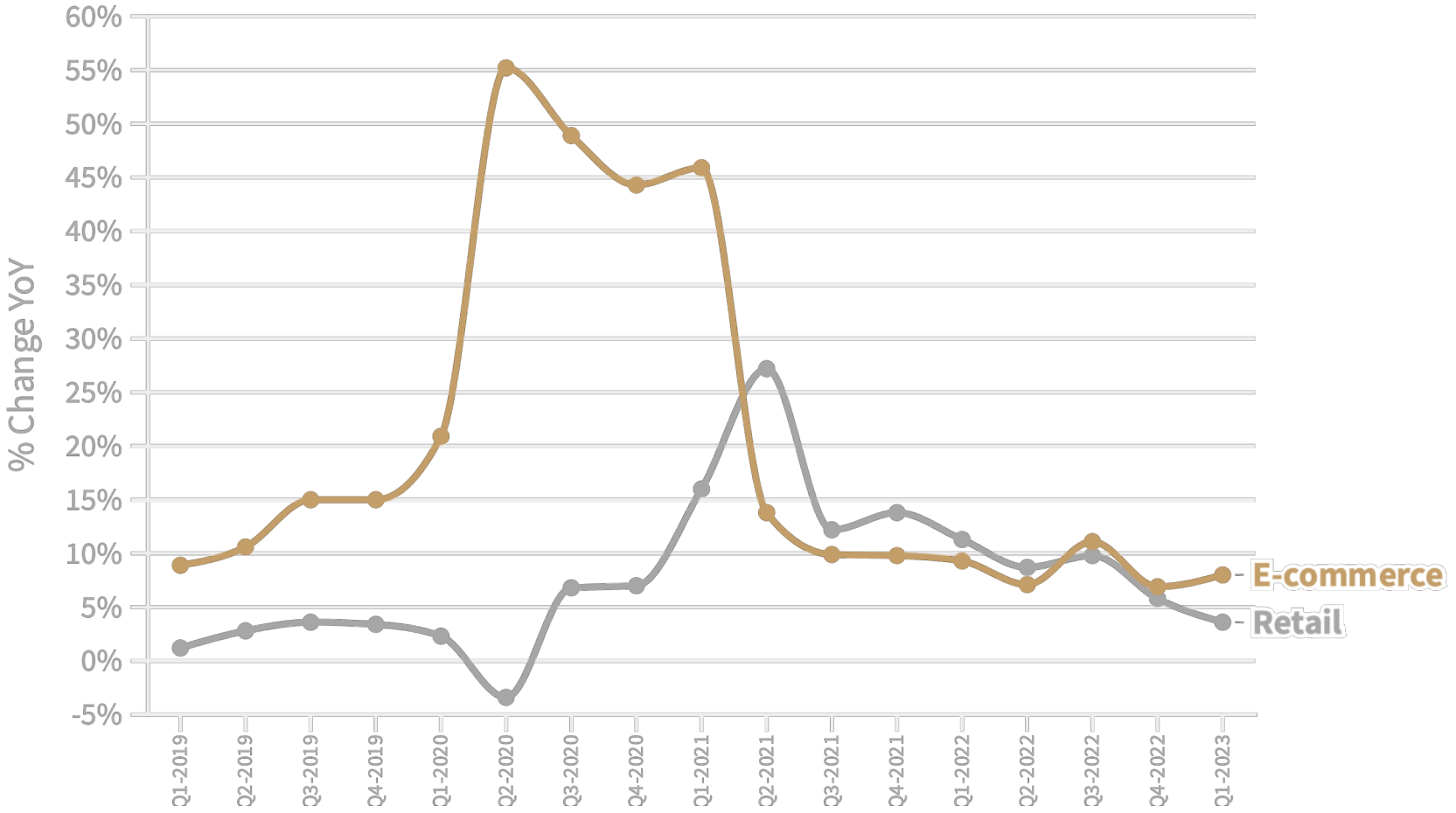
# E-Commerce vs Retail YoY Growth



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



THE WALL STREET JOURNAL.

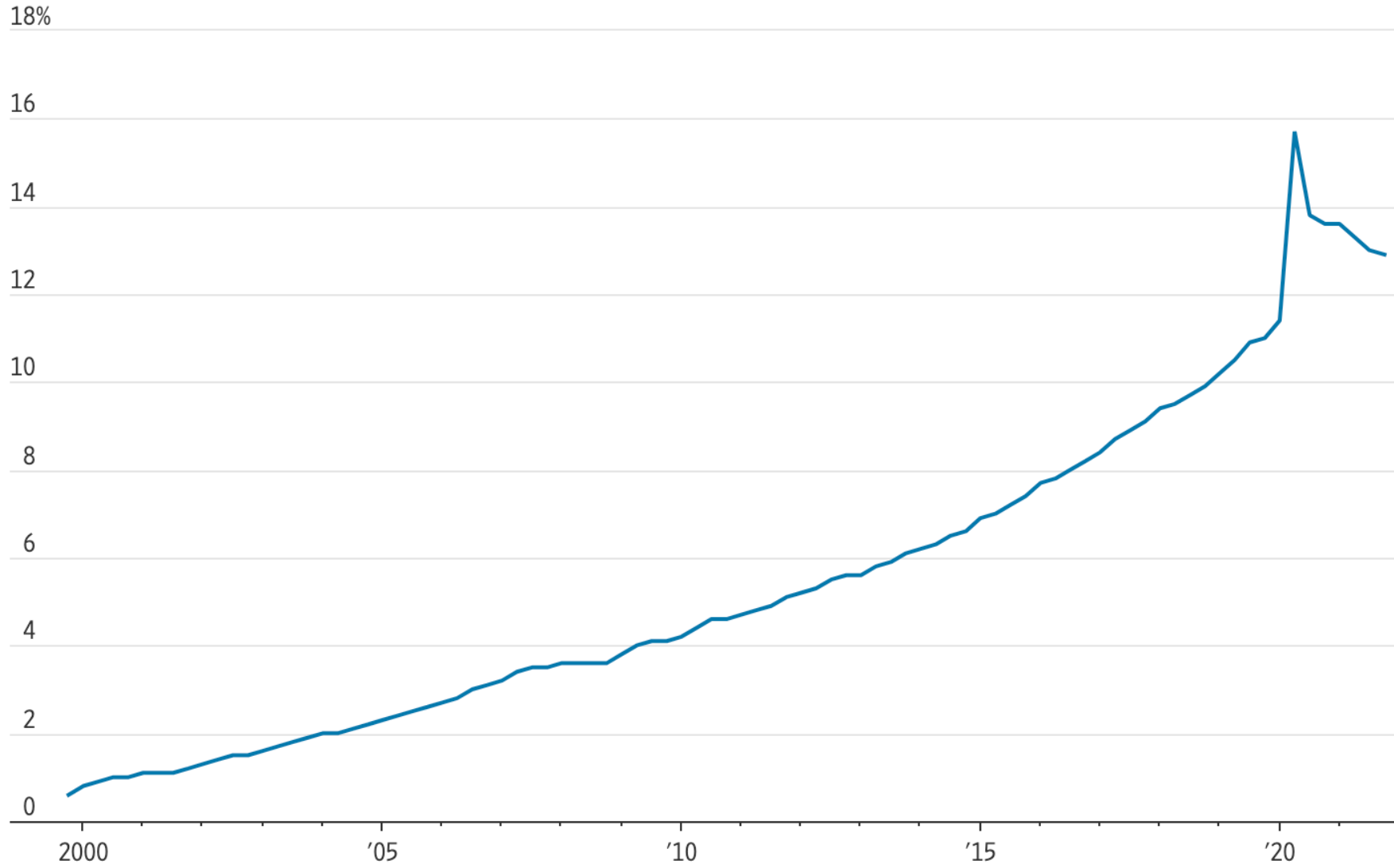
BUSINESS

# The Pandemic Was Supposed to Push All Shopping Online. It Didn't.

E-commerce retailers that rode a surge of online purchases in 2020 are now grappling with the fact that some customers have returned to stores



## Estimated e-commerce as a percentage of total retail sales

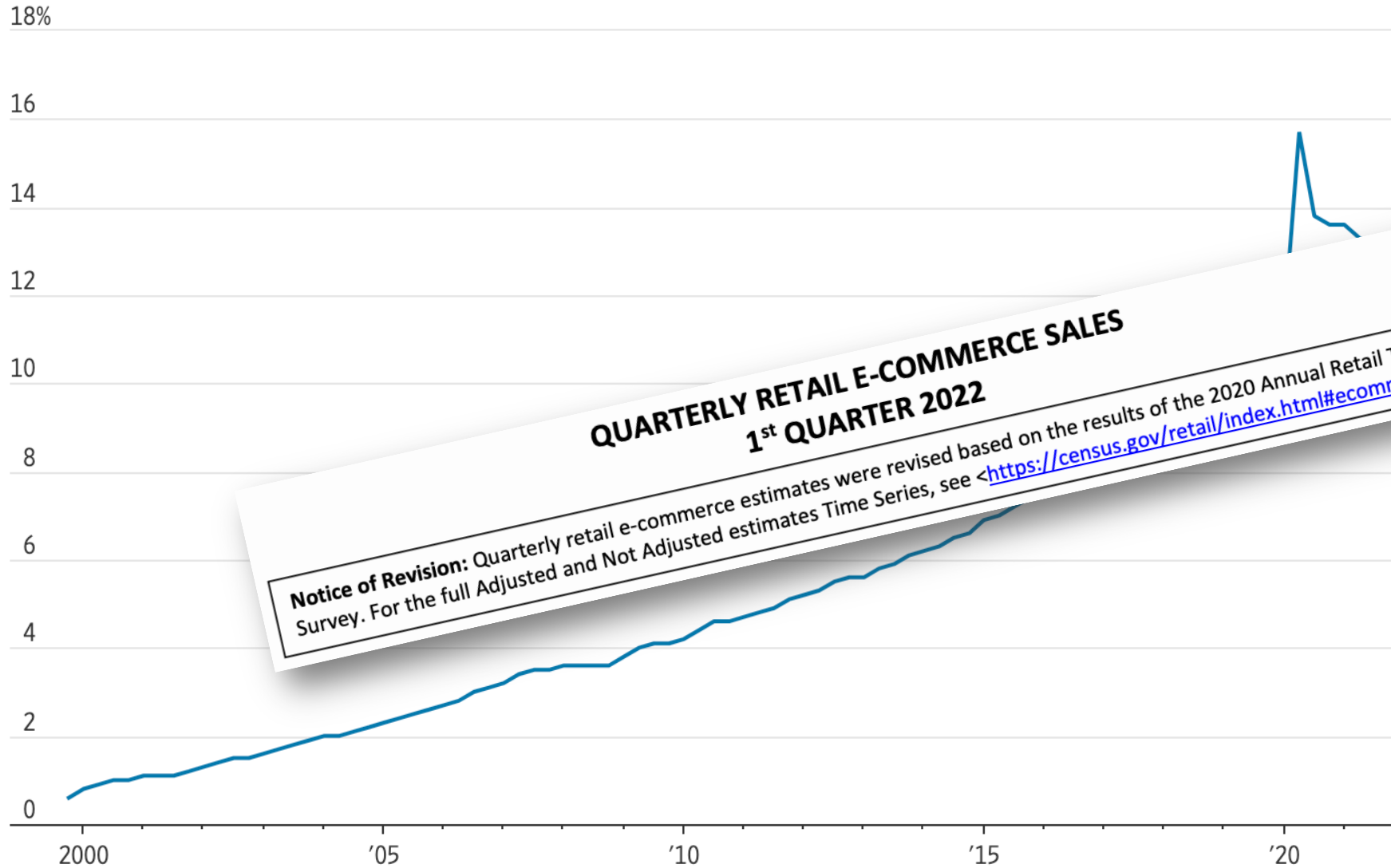


Source: U.S. Census Bureau

WSJ



## Estimated e-commerce as a percentage of total retail sales



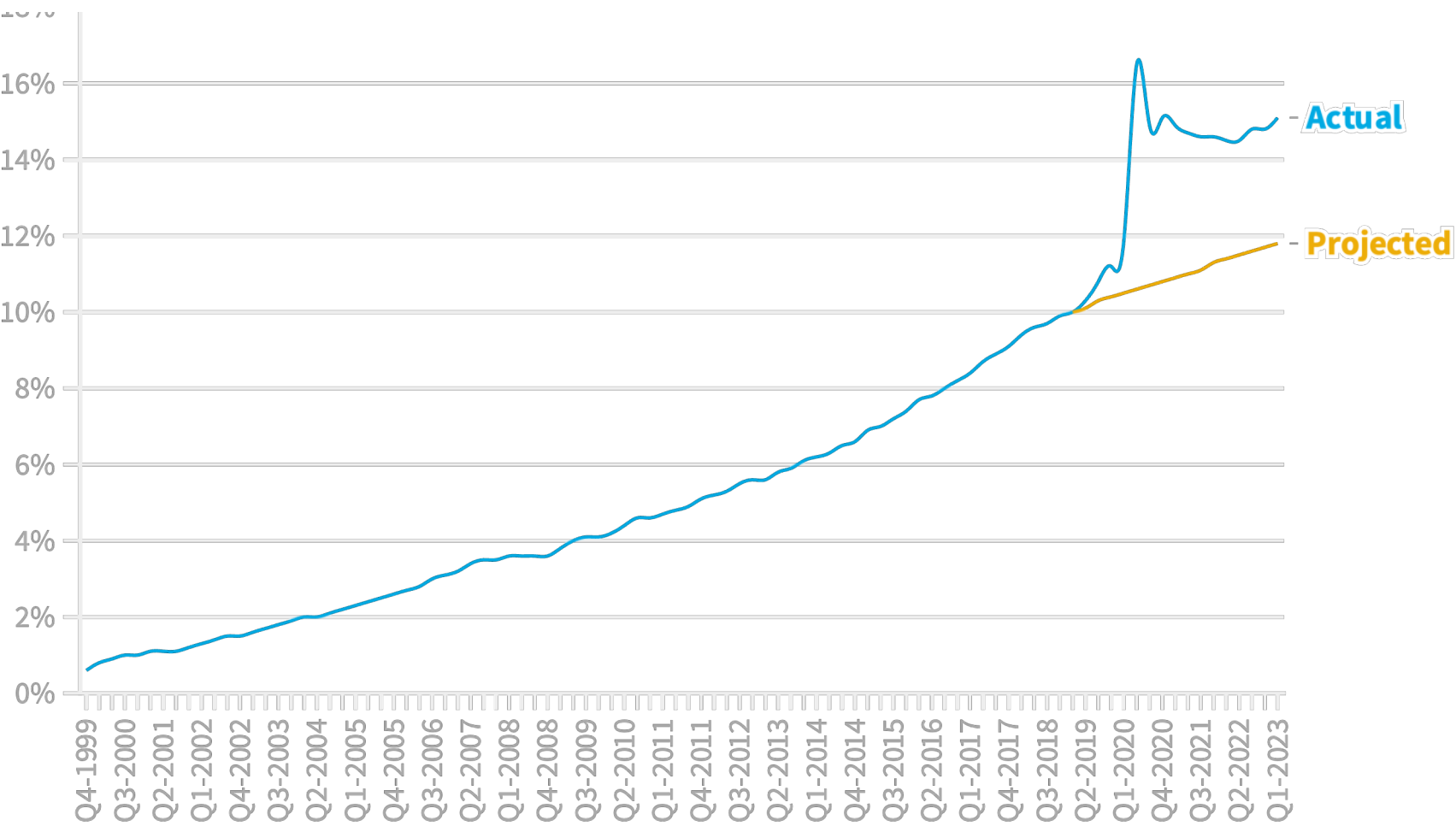
### QUARTERLY RETAIL E-COMMERCE SALES 1<sup>st</sup> QUARTER 2022

**Notice of Revision:** Quarterly retail e-commerce estimates were revised based on the results of the 2020 Annual Retail Trade Survey. For the full Adjusted and Not Adjusted estimates Time Series, see <https://census.gov/retail/index.html#ecommerce>.

# WSJ

Source: U.S. Census Bureau

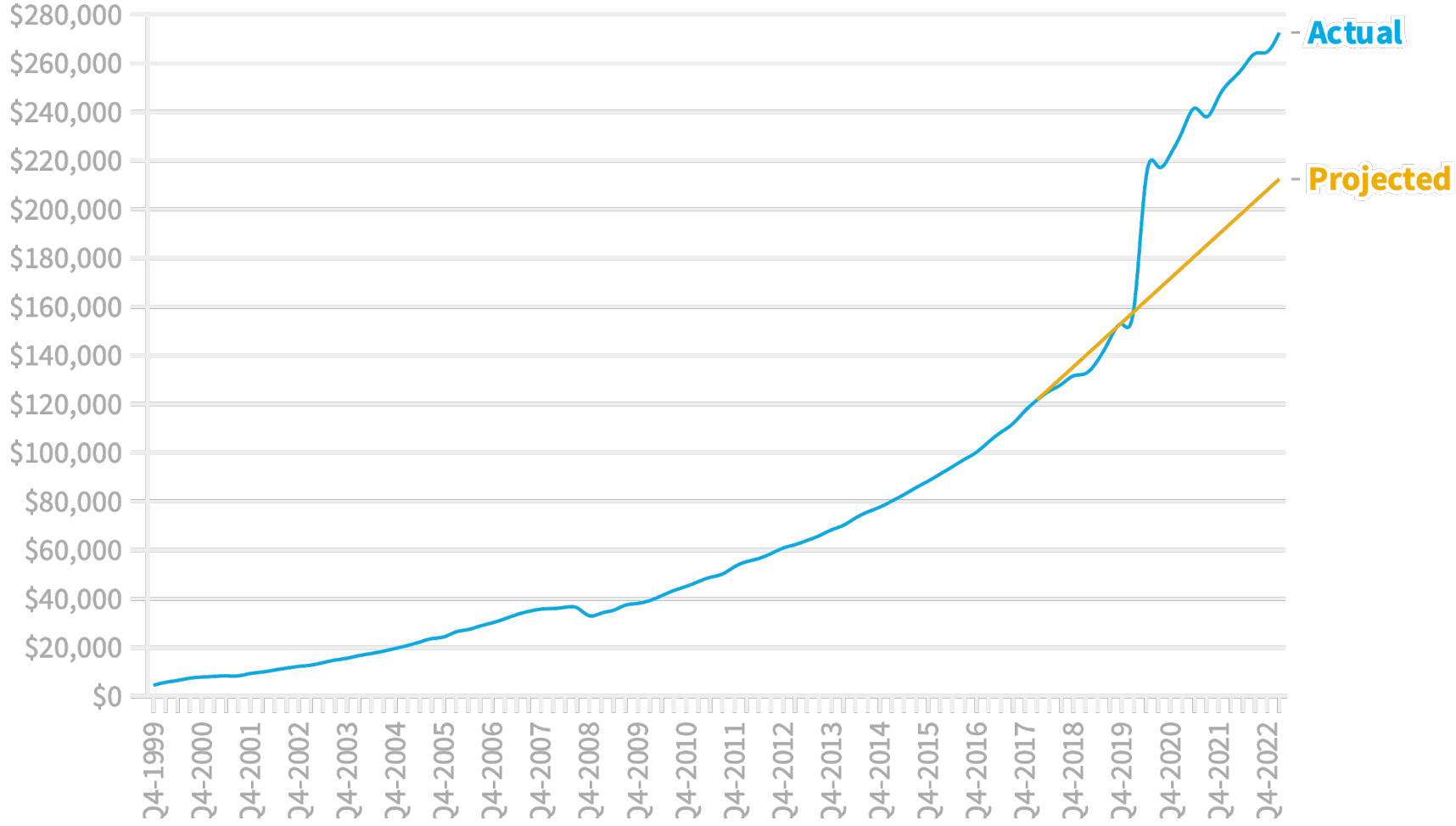
# E-Commerce Share of Retail



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

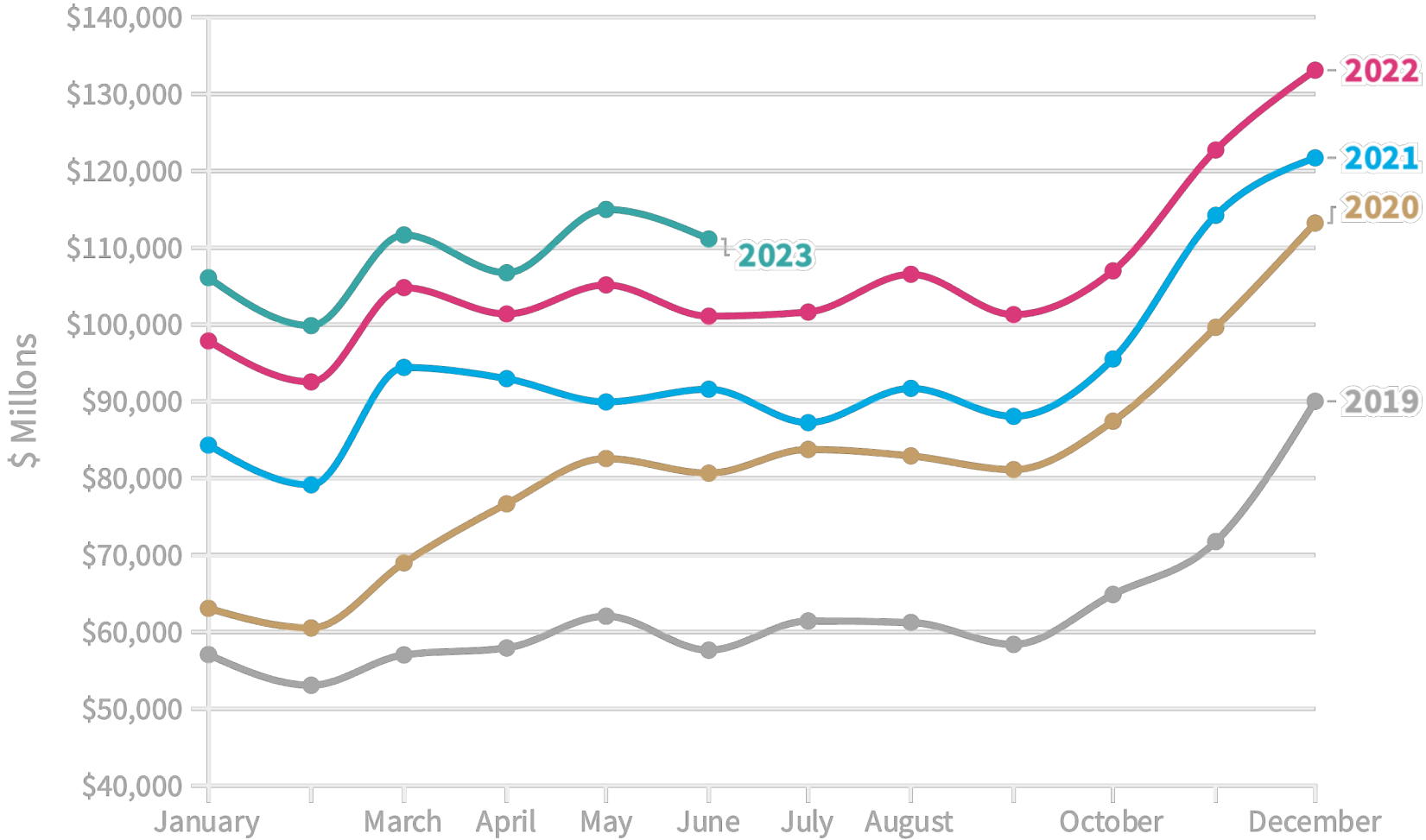


# E-Commerce Revenue



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

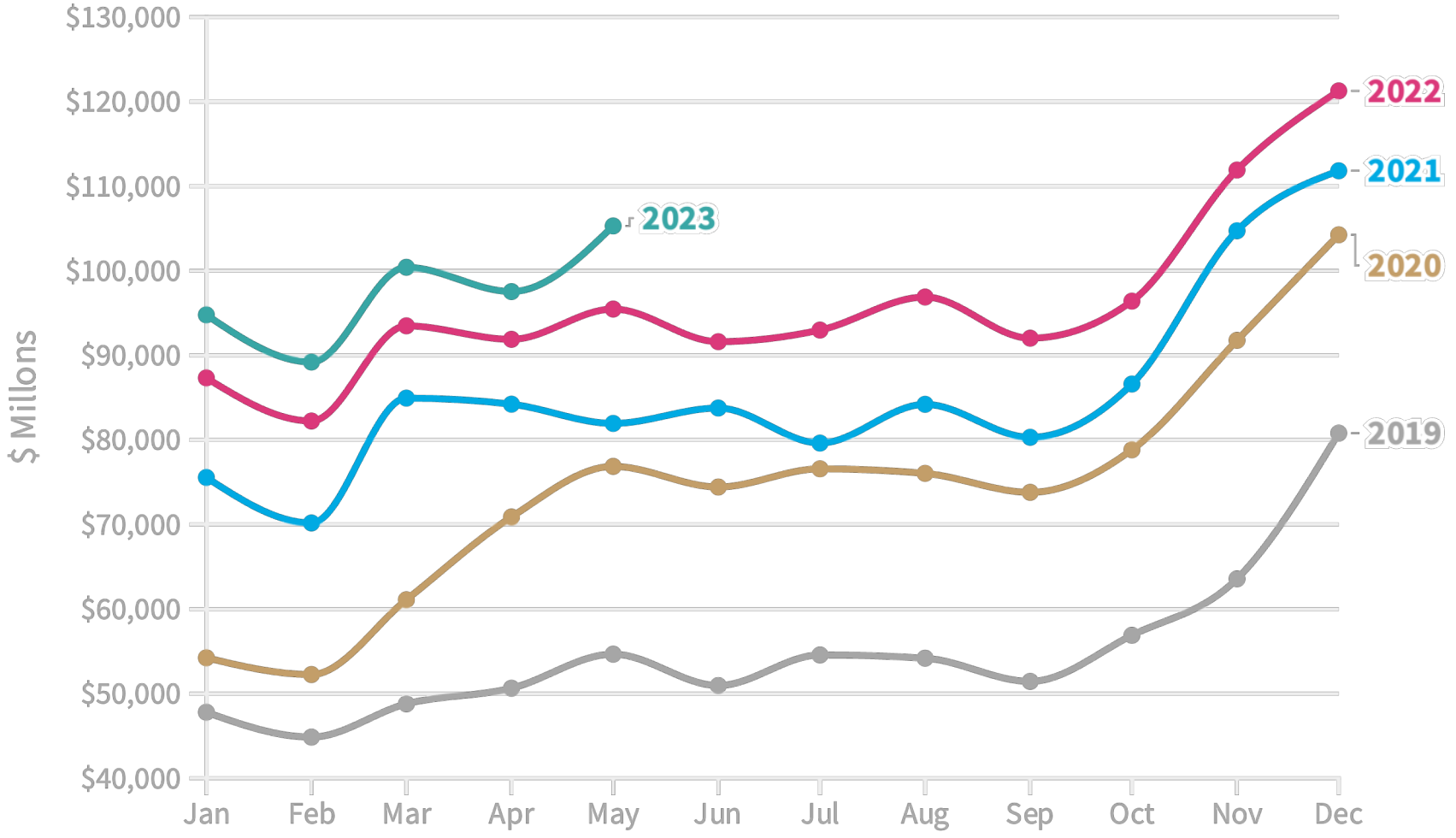
# Non-Store Sales (E-Com & Catalog)



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



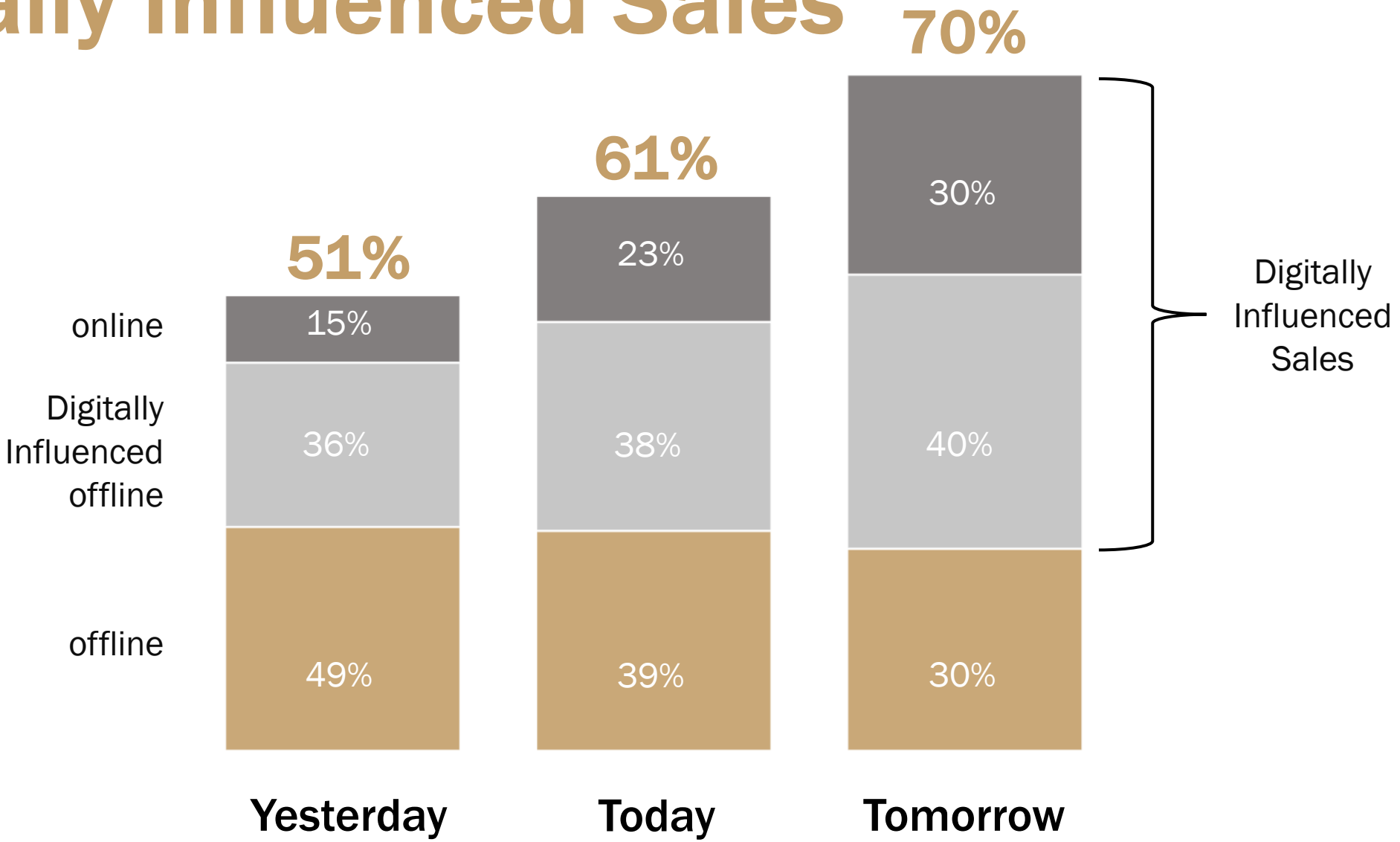
# E-Commerce (MRTS)



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



# Digitally Influenced Sales



# Grocery E-Commerce 2022

**\$96.8B**

10% of Grocery

# Grocery E-Commerce Jan-June

**\$47B**

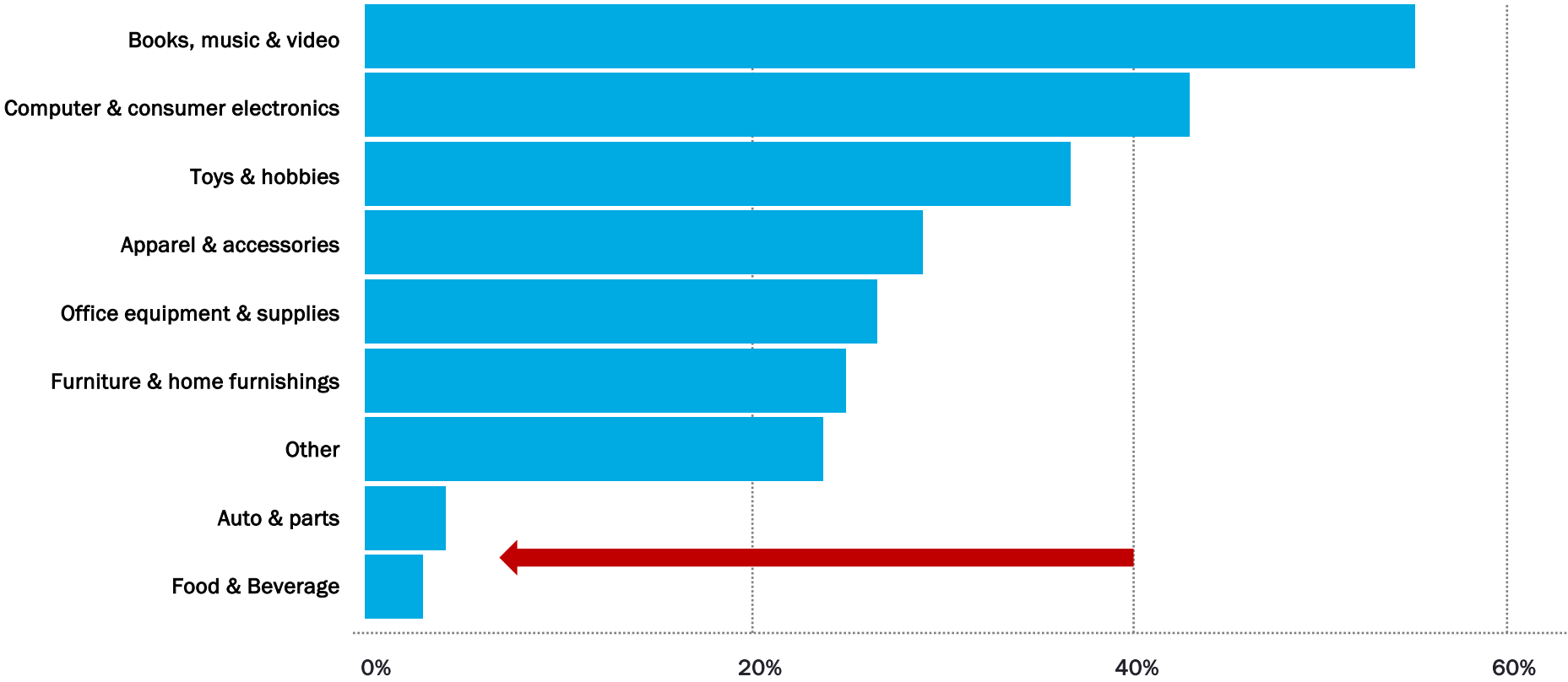
**-2.28% vs 2022**

**13% of Grocery Sales**

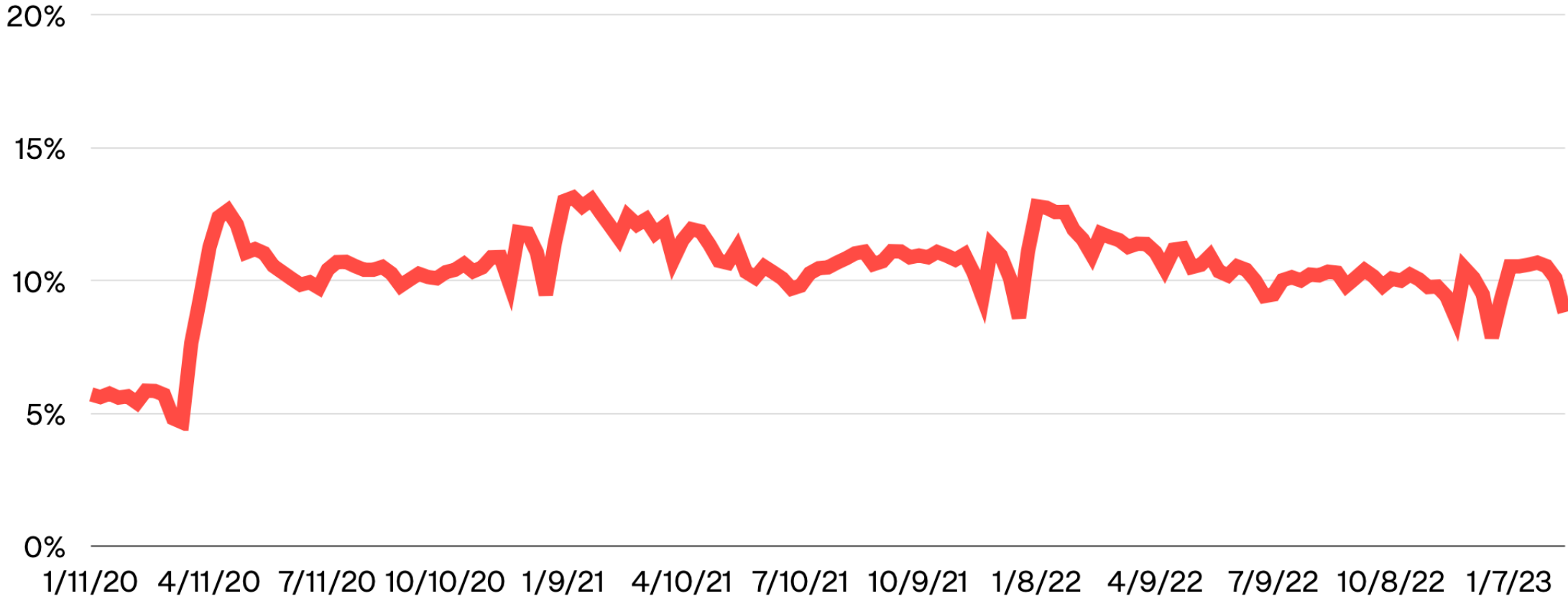


# Digital Grocery was primed for disruption

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



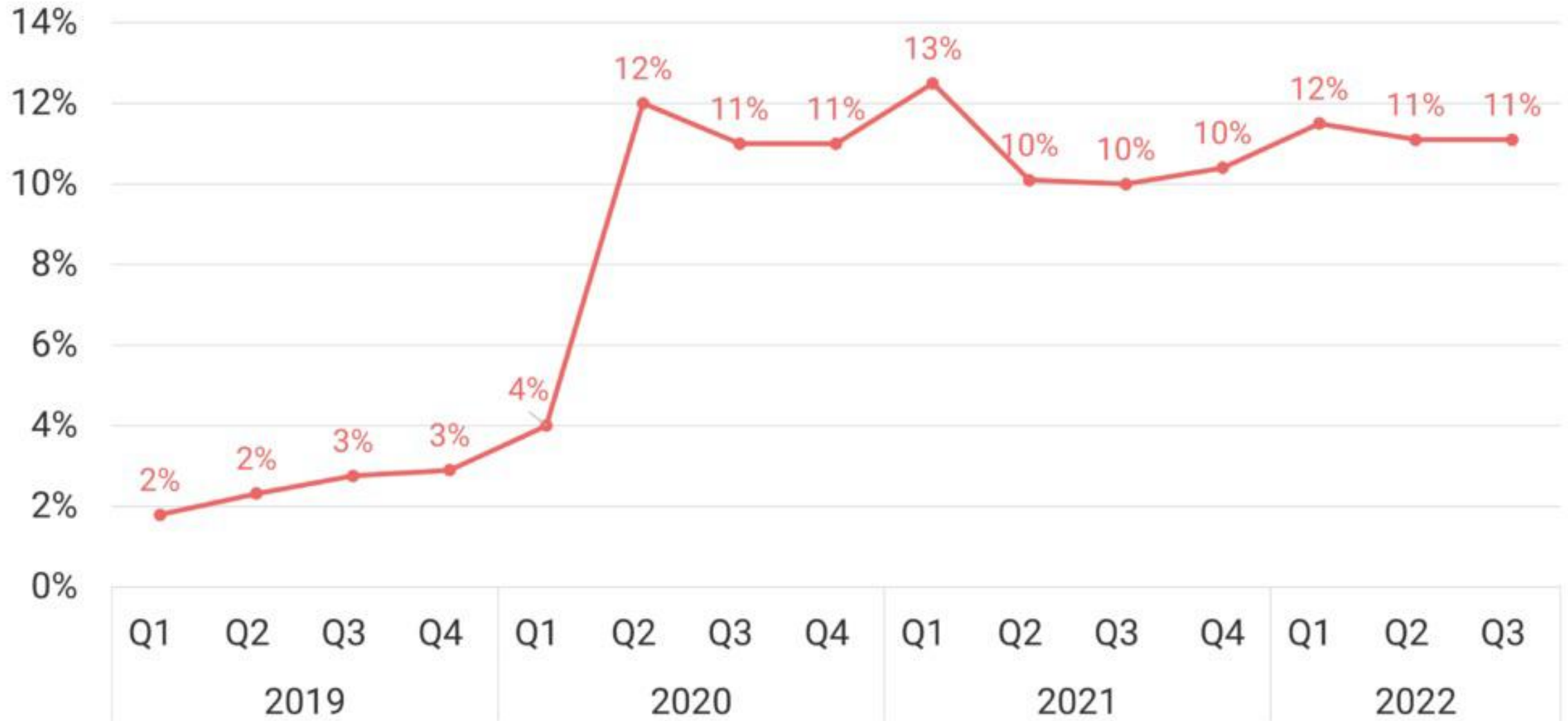
# Online share of US grocery spending



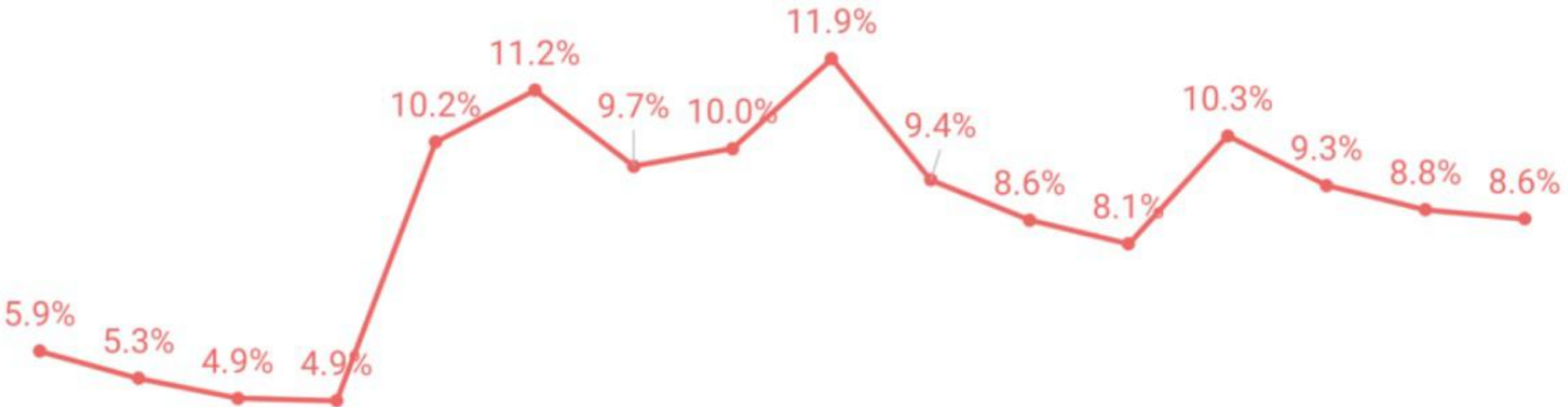
SOURCE: Earnest Analytics. 4-week trailing average via The New Consumer



# Sprouts Market – Digital Penetration



# Kroger– Digital Penetration



1Q	2Q	3Q	4Q	1Q	2Q	3Q	4Q	1Q	2Q	3Q	4Q	1Q	2Q	3Q	4Q
2019				2020				2021				2022			

“

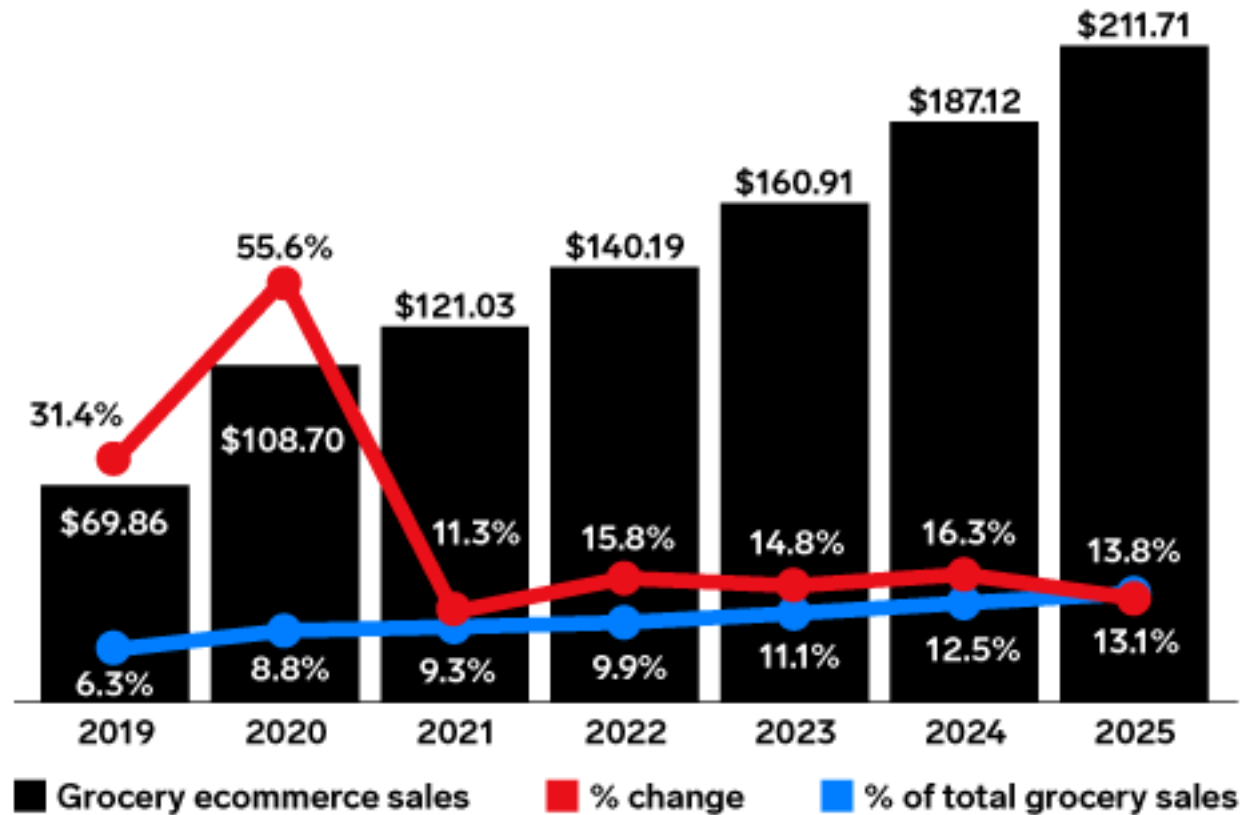
Panera  B R E A D

**Over 60% of sales come from e-commerce:  
Panera CEO on growth of digital sales**

**Panera CEO Niren Chaudhary**

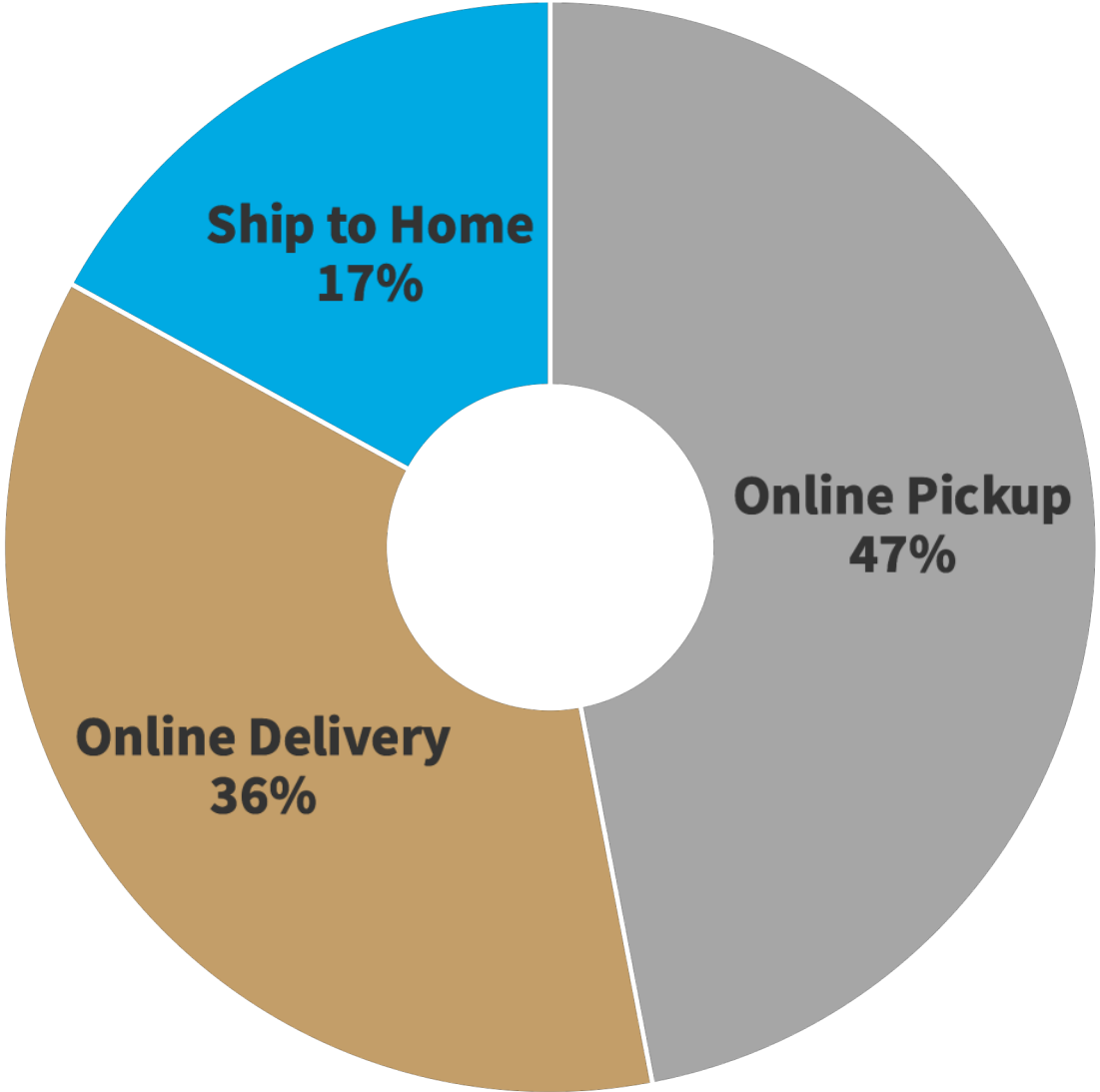
# US Grocery E-Commerce Sales 2019-2025

Billions, % Change, and % of total grocery sales

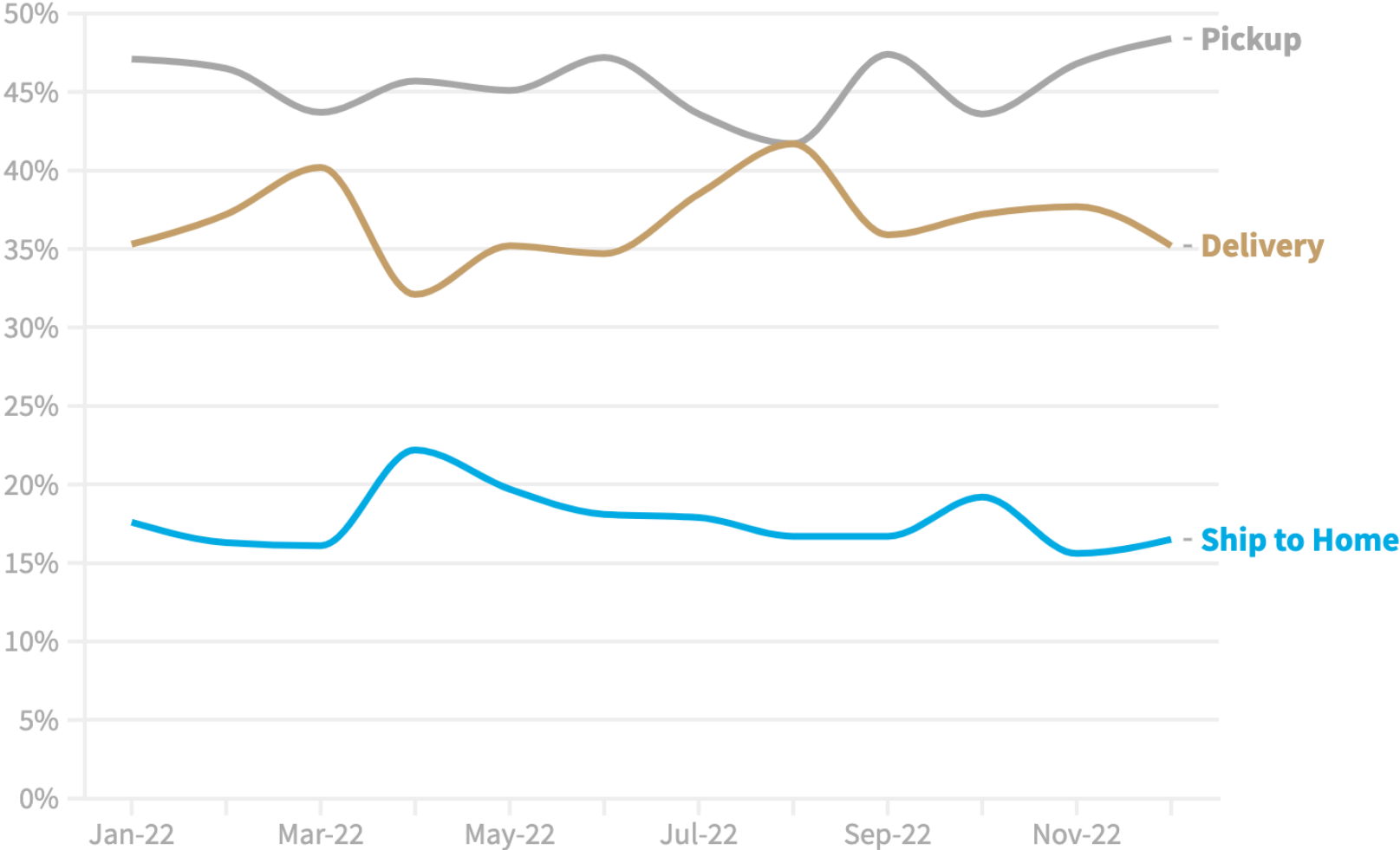


Source: eMarketer Aug 2022

# Grocery E-Commerce Delivery Method

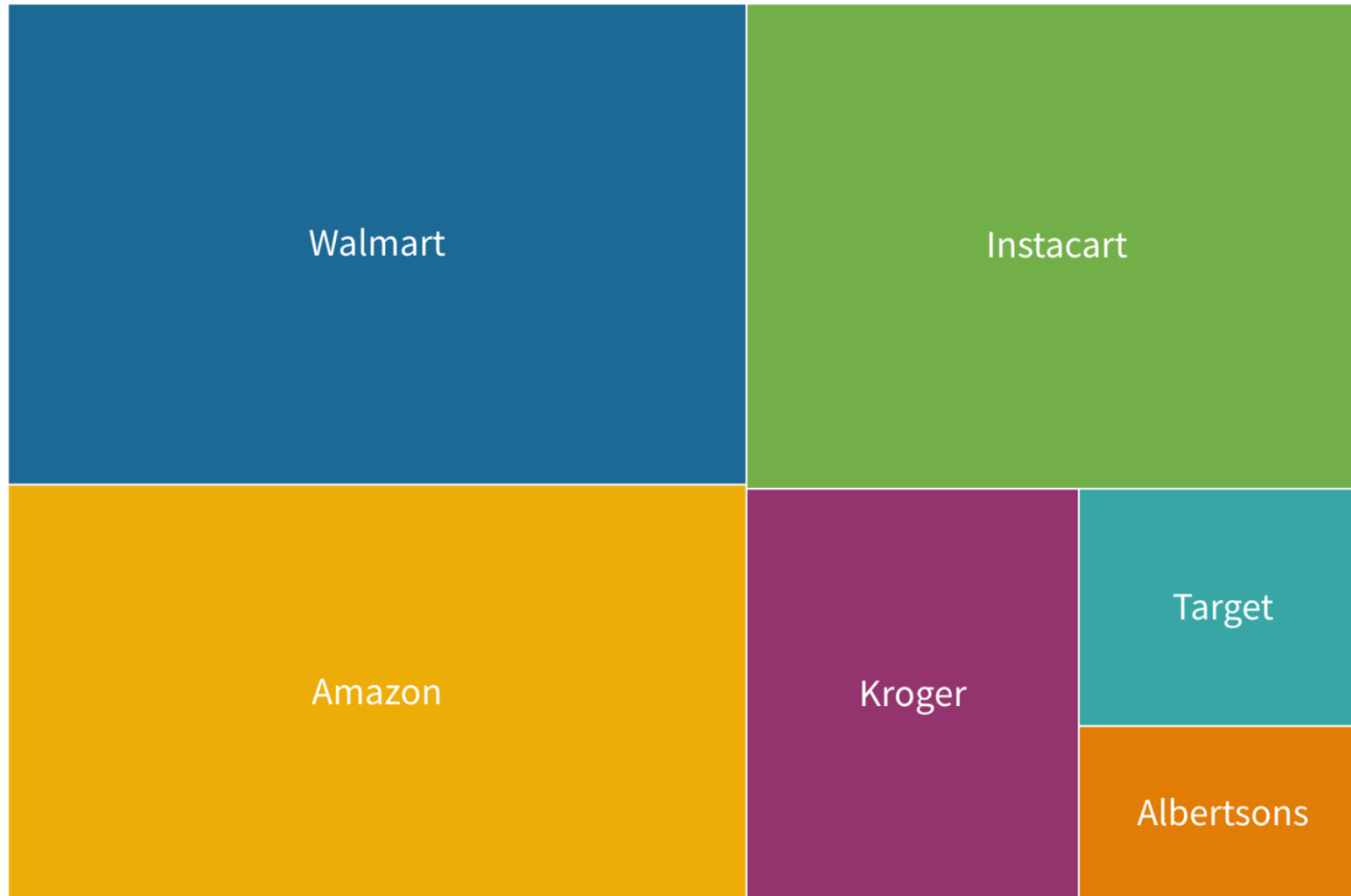


# Grocery E-Commerce Delivery Method





# Top 6 Grocers Are 87% of Market



# Digital Grocery

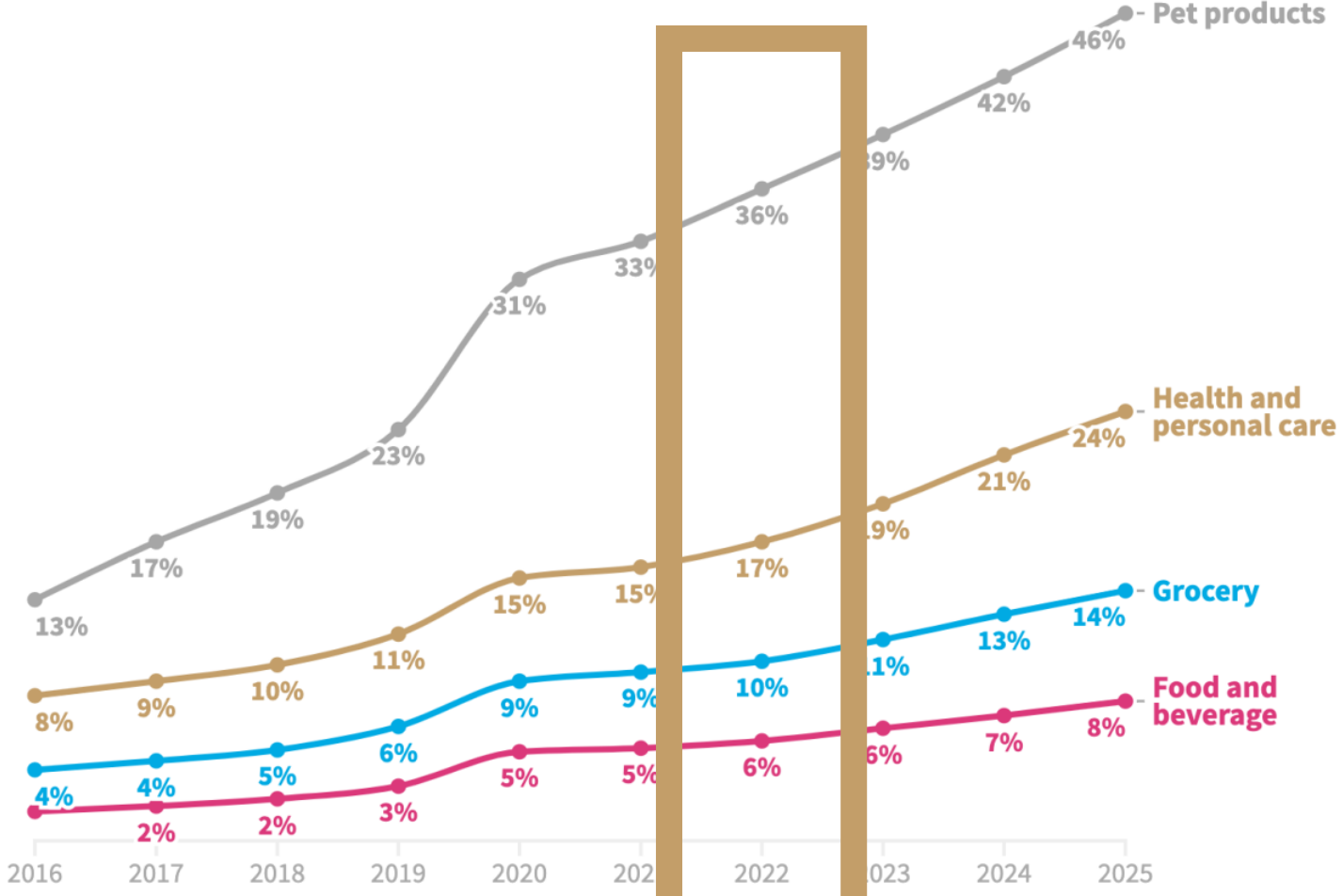


61% of Edible



66% of Non-food

# E-Commerce Grocery Penetration



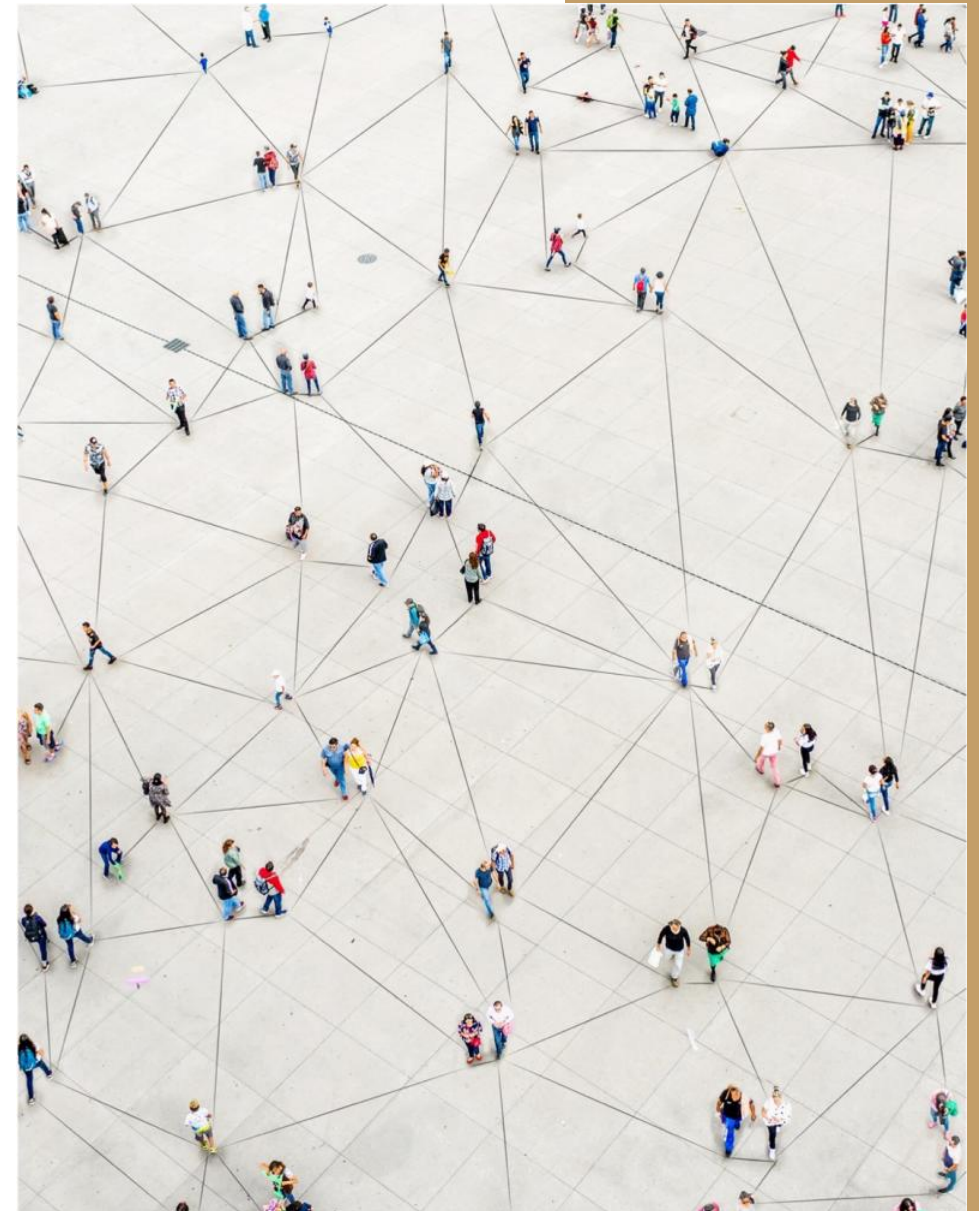
# Data Sources

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

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CEO of GetSpiffy and  
Co-Founder of ChannelAdvisor

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