



**PUBLICIS
COMMERCE**

US Commerce Data Compendium

March 2023





2022 Retail

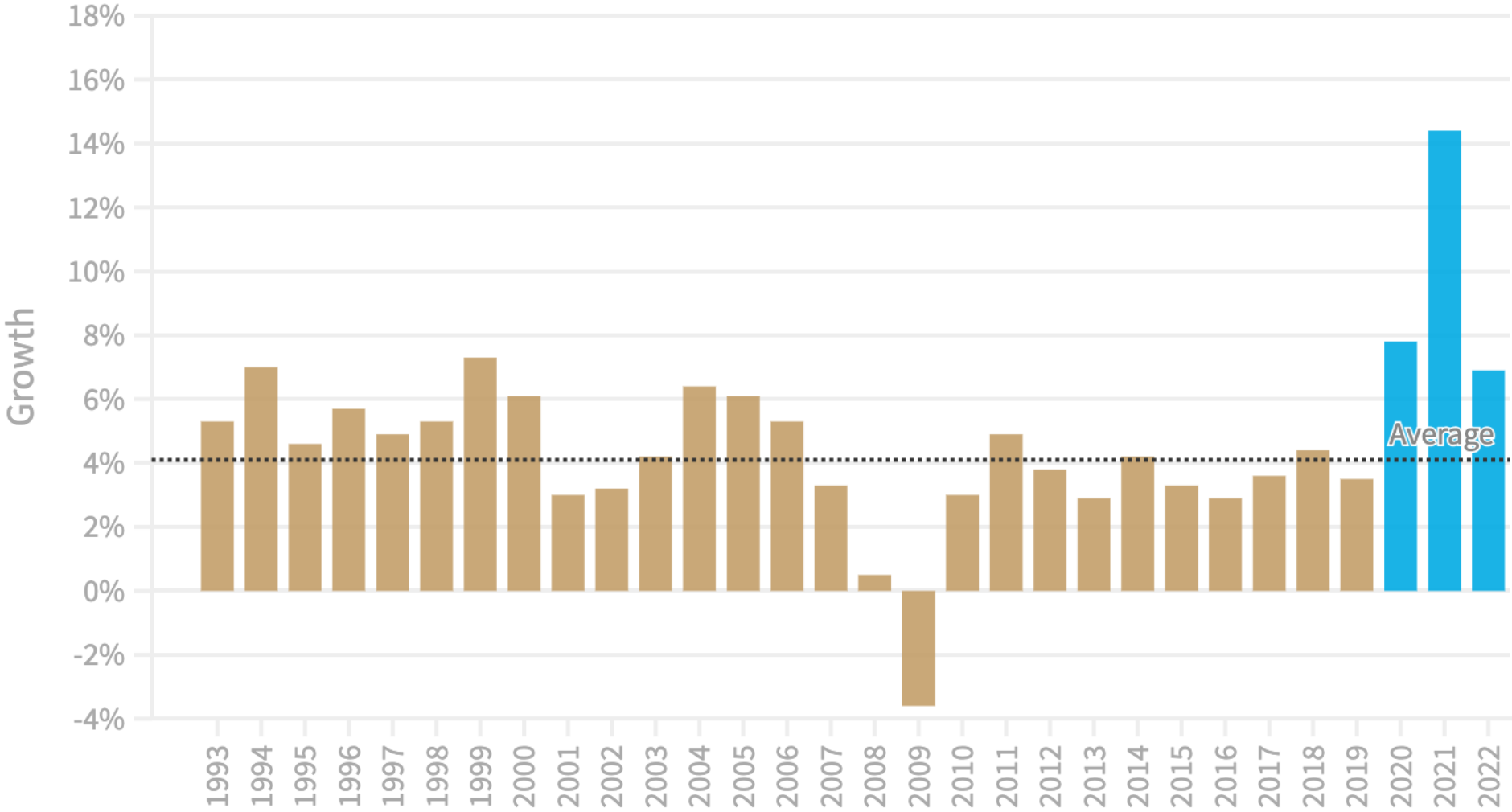
\$7.1T

+8.2% v 2021

+31% v 2019

Core Retail Growth YoY (ex Auto & Gas)

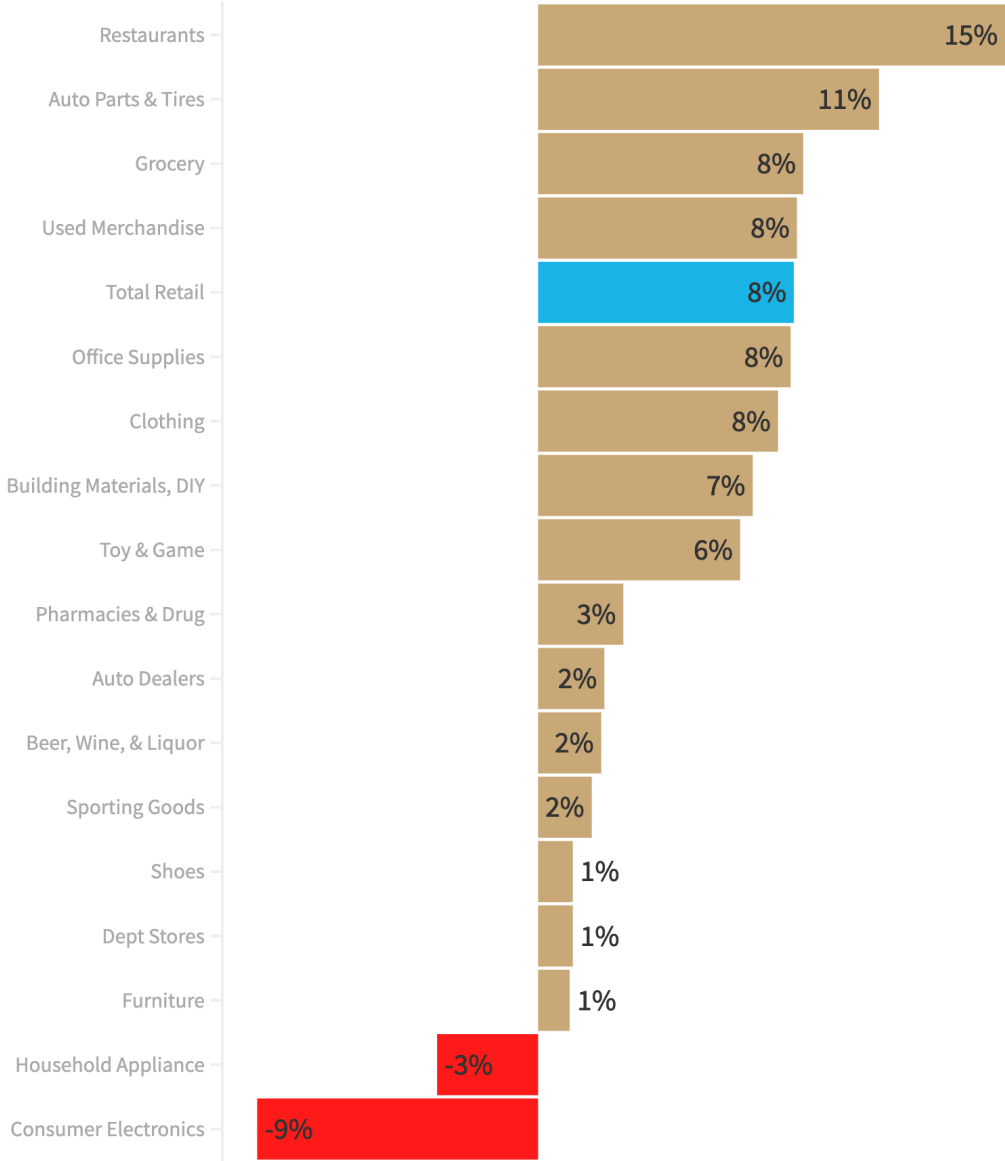
Up 6.9% in 2022
Up 14.4% in 2021
Average growth 4.1%



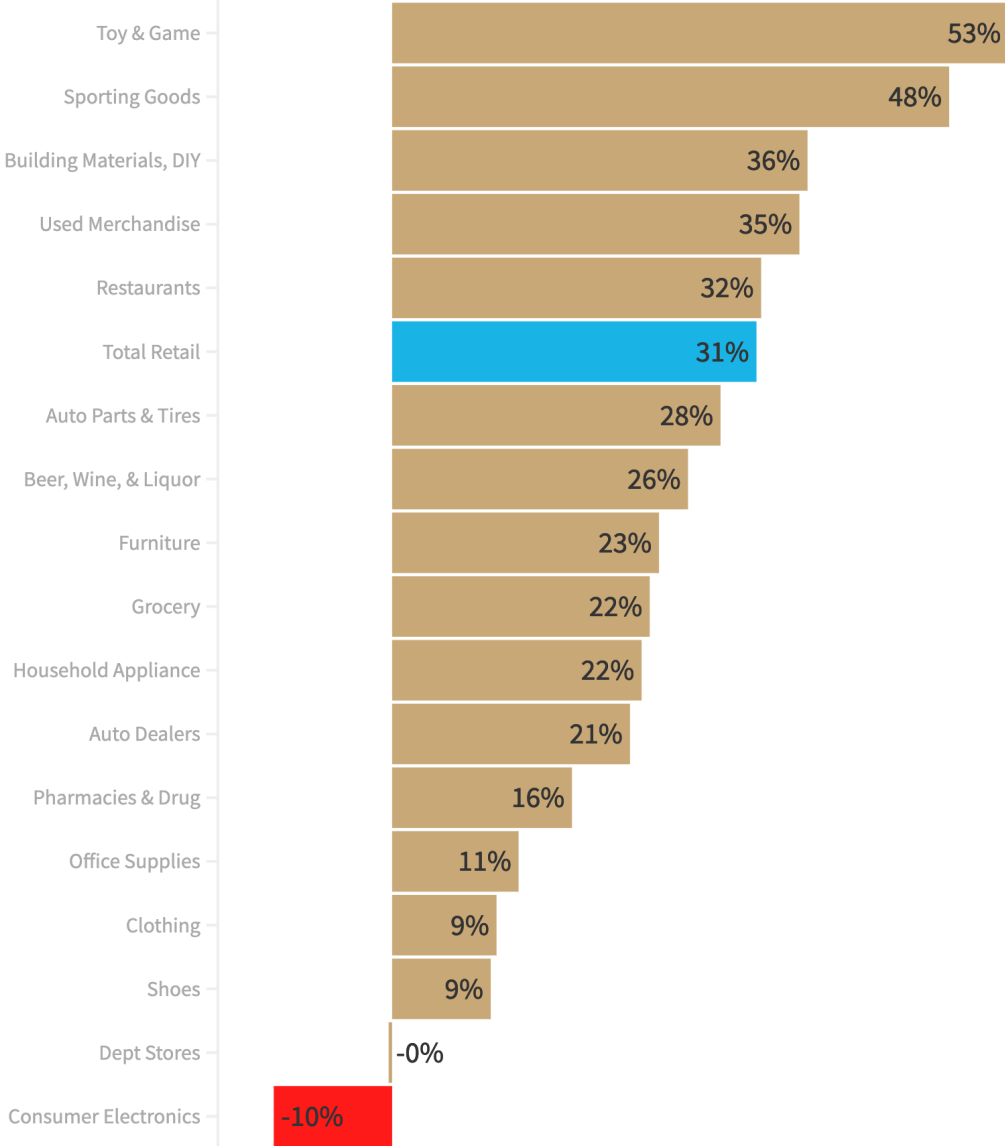
SOURCE: US Dept of Commerce, Economic Indicators Division, Retail Indicator Branch, Adv Monthly, NAISC 44000



YTD Sales vs 2021



YTD Sales vs 2019





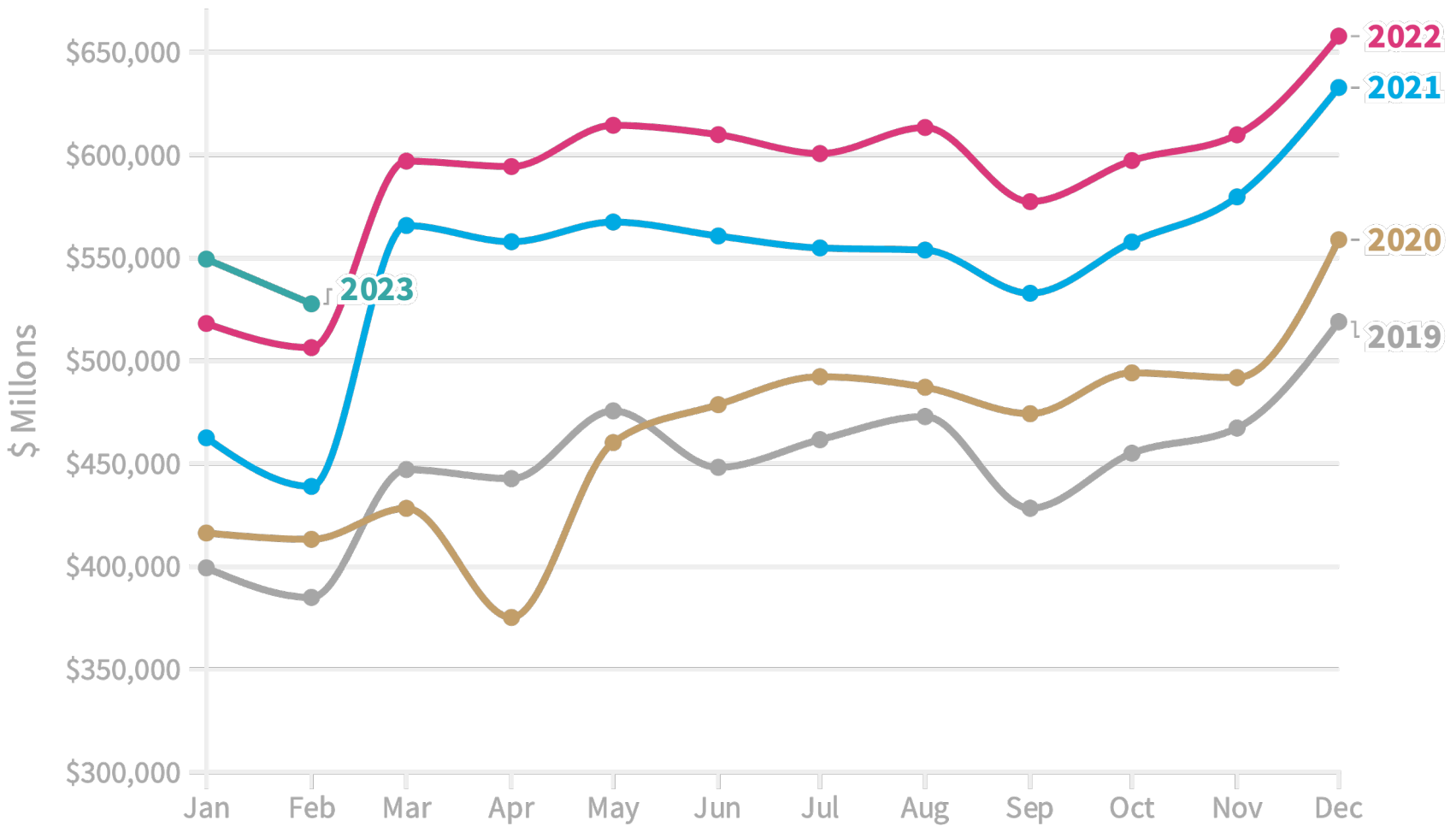
2023 Retail Jan-Feb

\$1T

+5.1% v 2022

+37% v 2019

Monthly Retail Sales



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



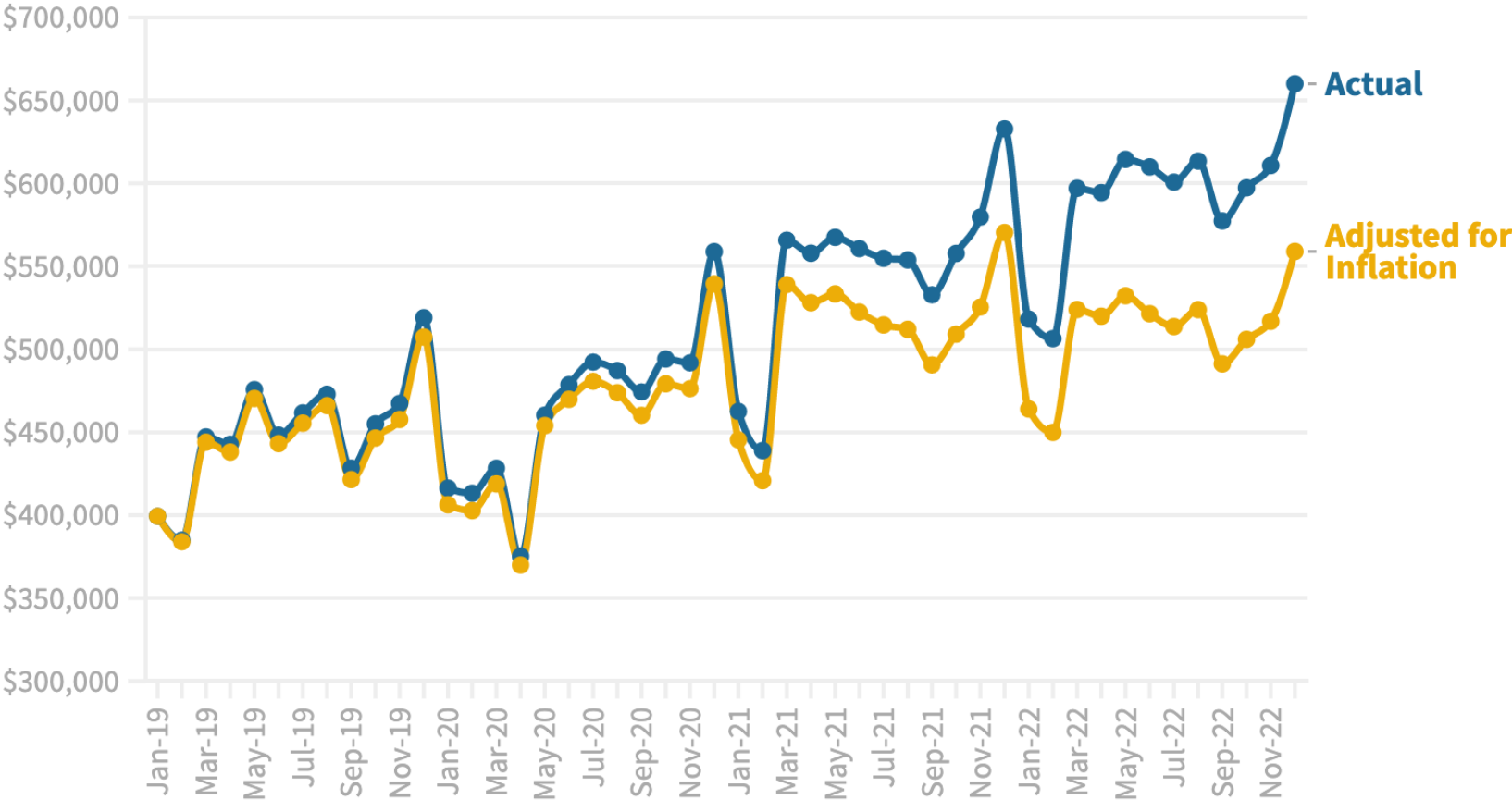
Inflation (Feb 2023)

6.0%

2.3% Dec 2019

US Retail Sales Adjusted for inflation

YTD Up 5.1% (-1% adjusted) YoY
YTD Up 37.3% (15.4% adjusted) Yo4Y



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



2023 Automobile Jan - Feb

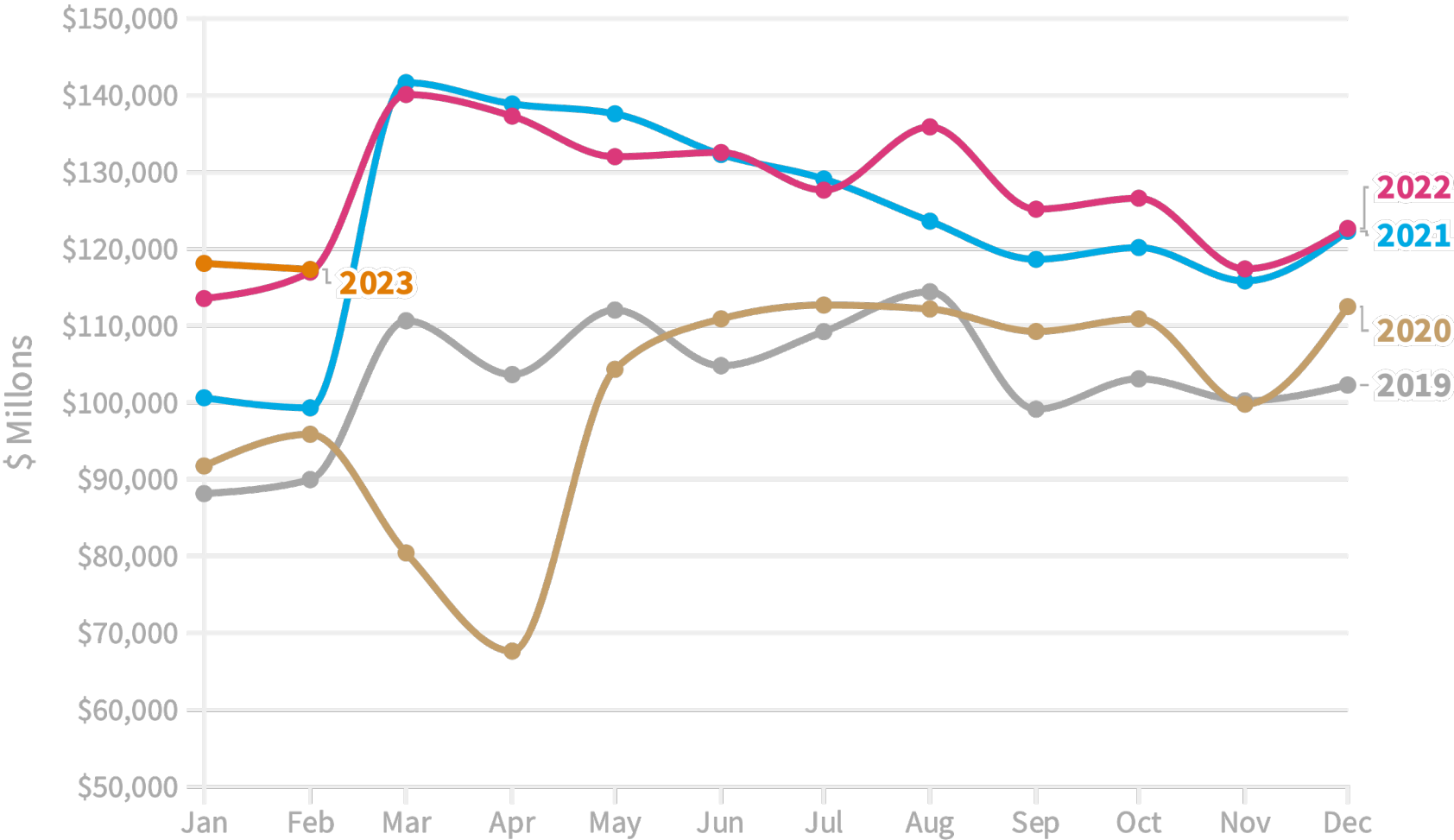
\$235B

+2.1% v 2022

+32% 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



2023 Grocery Jan - Feb

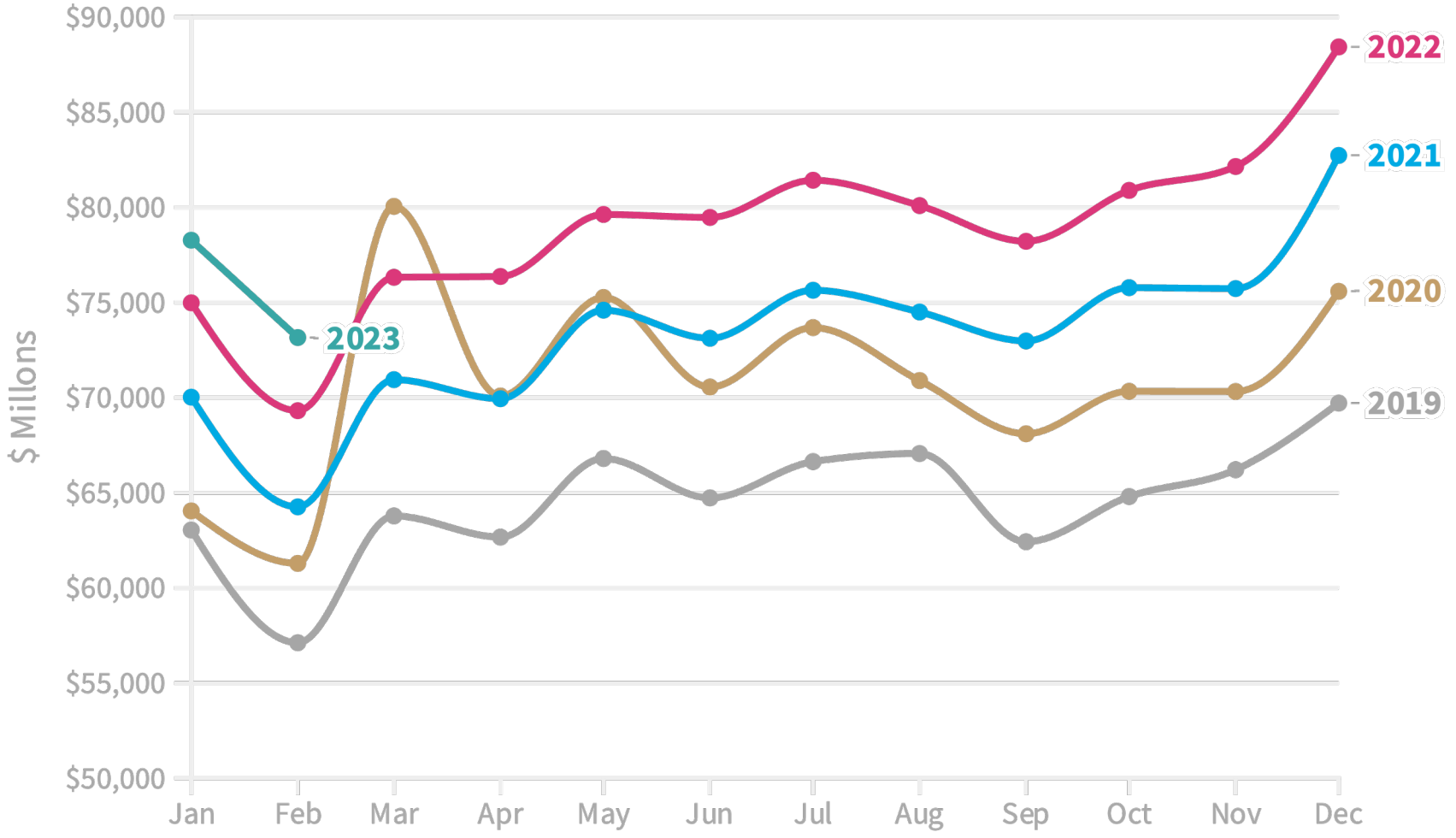
\$151B

+4.9% v 2022

+26% v 2019

14% of Retail

Monthly Grocery Sales

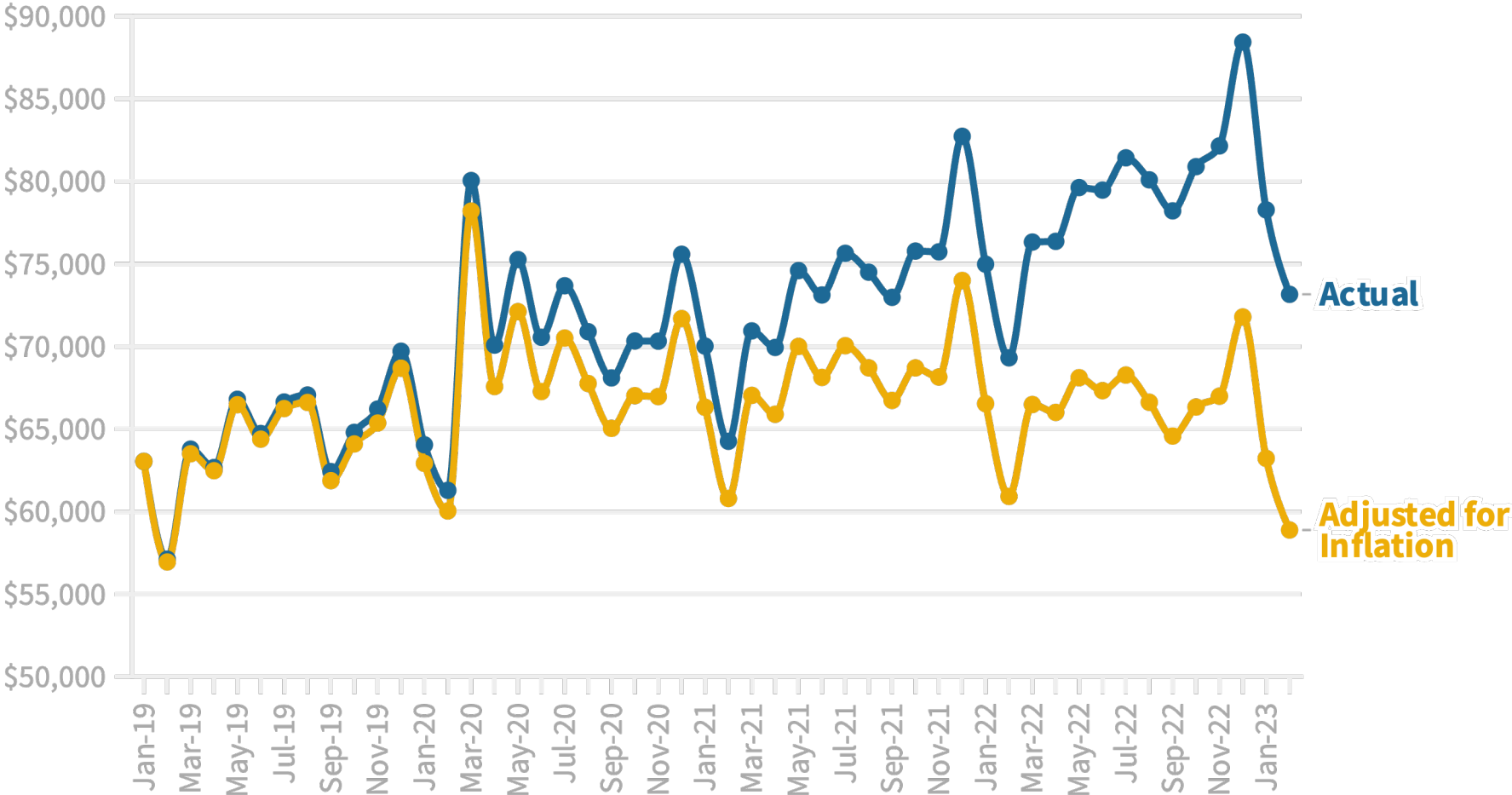


SOURCE: US Dept of Commerce, Economic Indicators Division, Retail Indicator Branch, Adv Monthly, Not Seasonally Adj. Cat 445



US Grocery Sales Adjusted for inflation

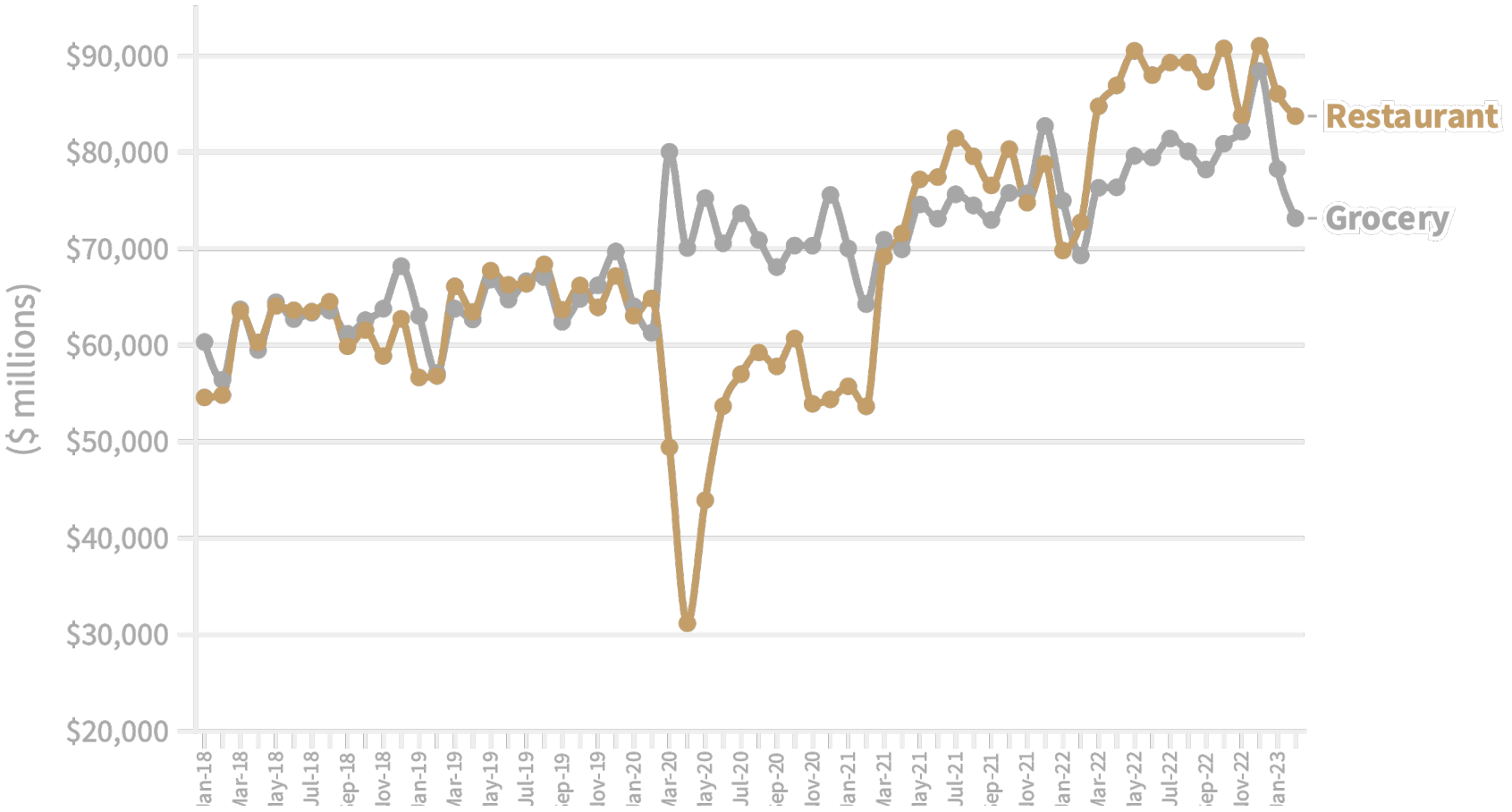
YTD Up 4.9%% (-4.2% adjusted) YoY
Up 26% (1.8% adjusted) Yo4Y



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



Restaurant vs Grocery

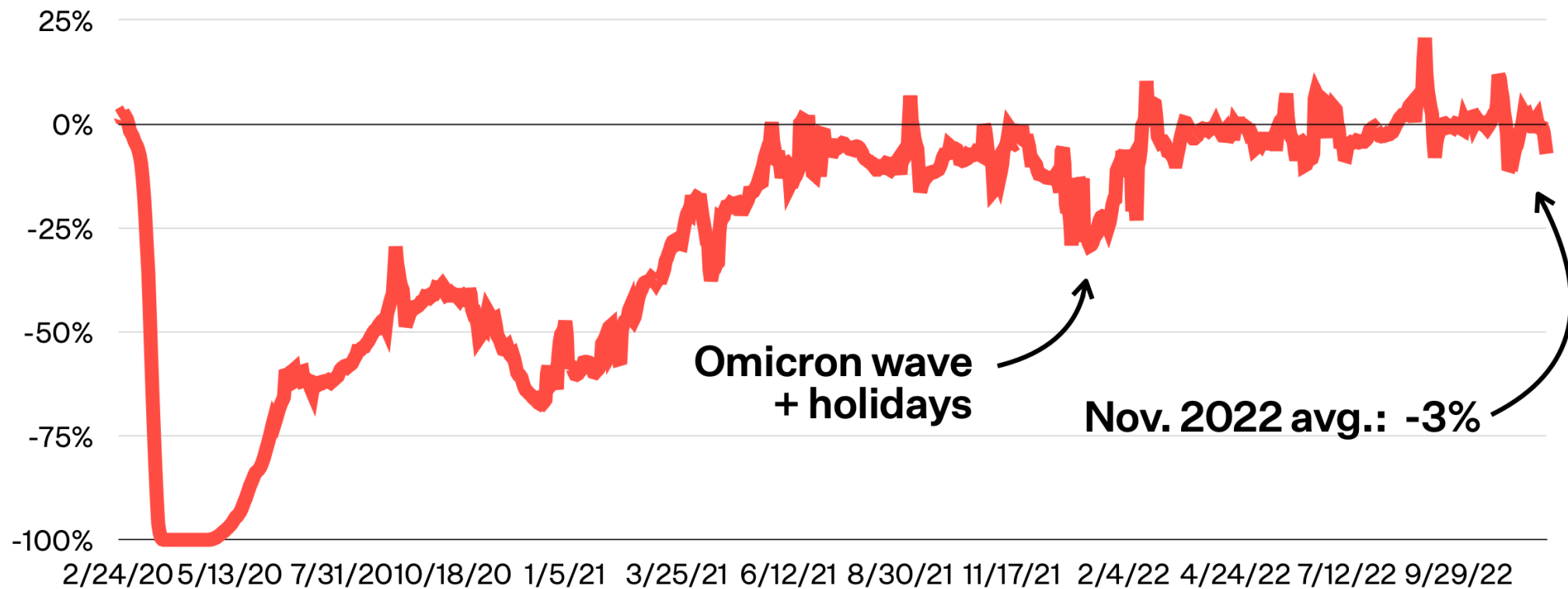


SOURCE: US Dept of Commerce, Economic Indicators Division, Retail Indicator Branch, Adv Monthly, Not Seasonally Adj. Cat 445 vs. 772



Restaurants Back to Normal

OpenTable seated diners change vs. 2019 'normal'



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

2023 Apparel Jan - Feb

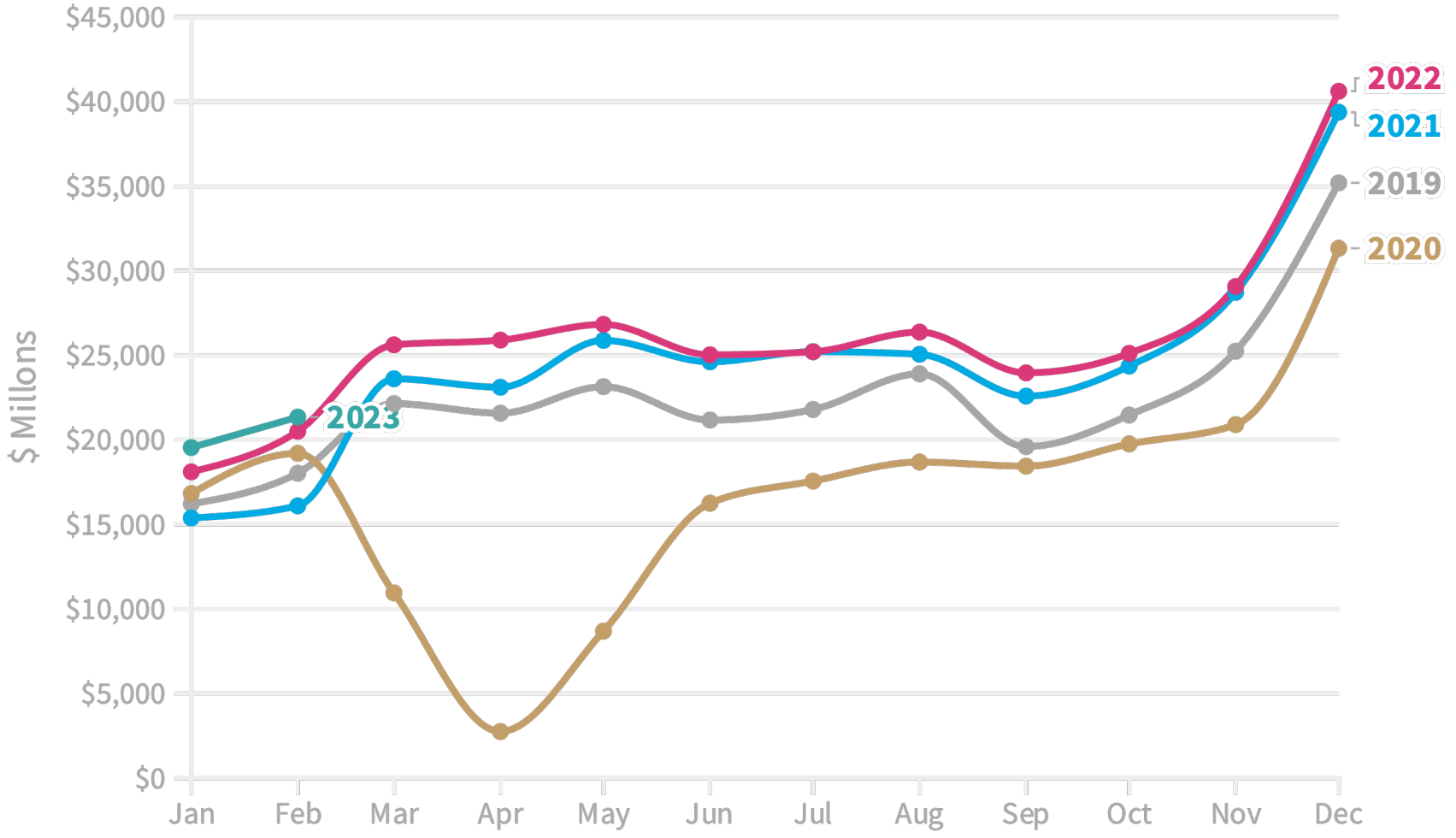
\$41B

+5.9% v 2022

+19% v 2019

4% of Retail

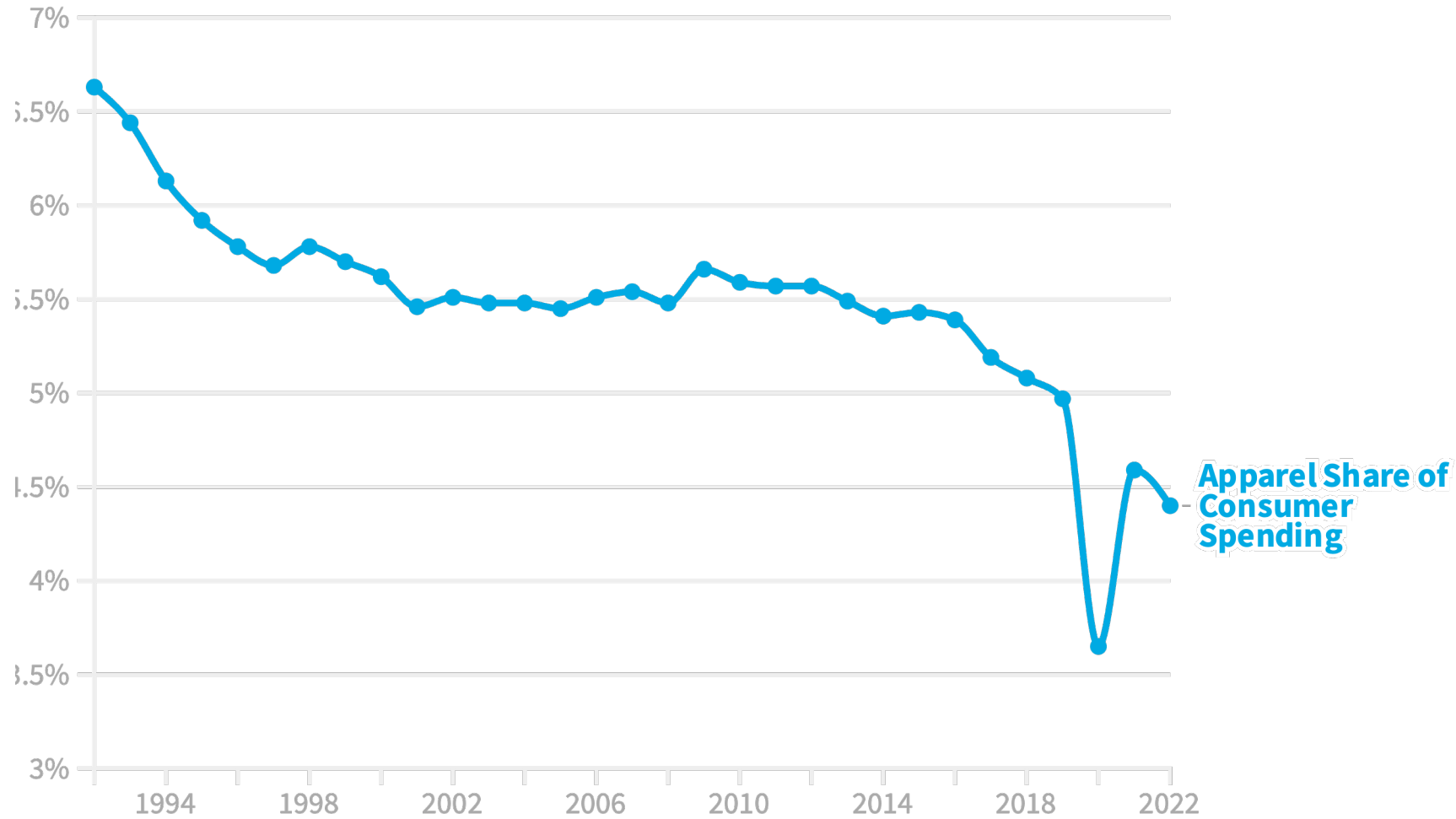
Monthly US Apparel Sales



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

2023 DIY / Home Improvement Jan-Feb

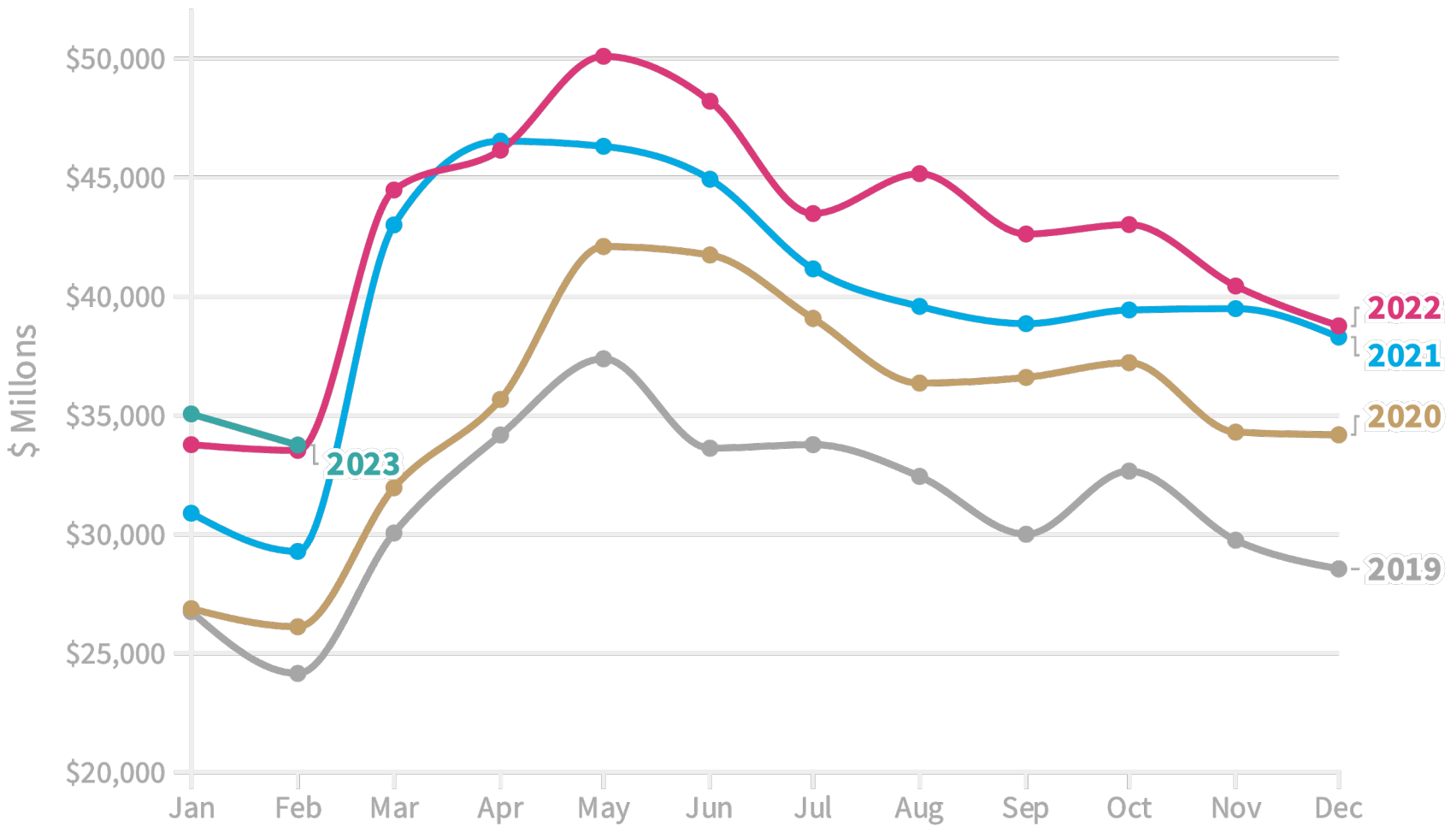
\$69B

+2.3% v 2022

+35% v 2019

6% 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



2023 Electronics – Jan - Feb

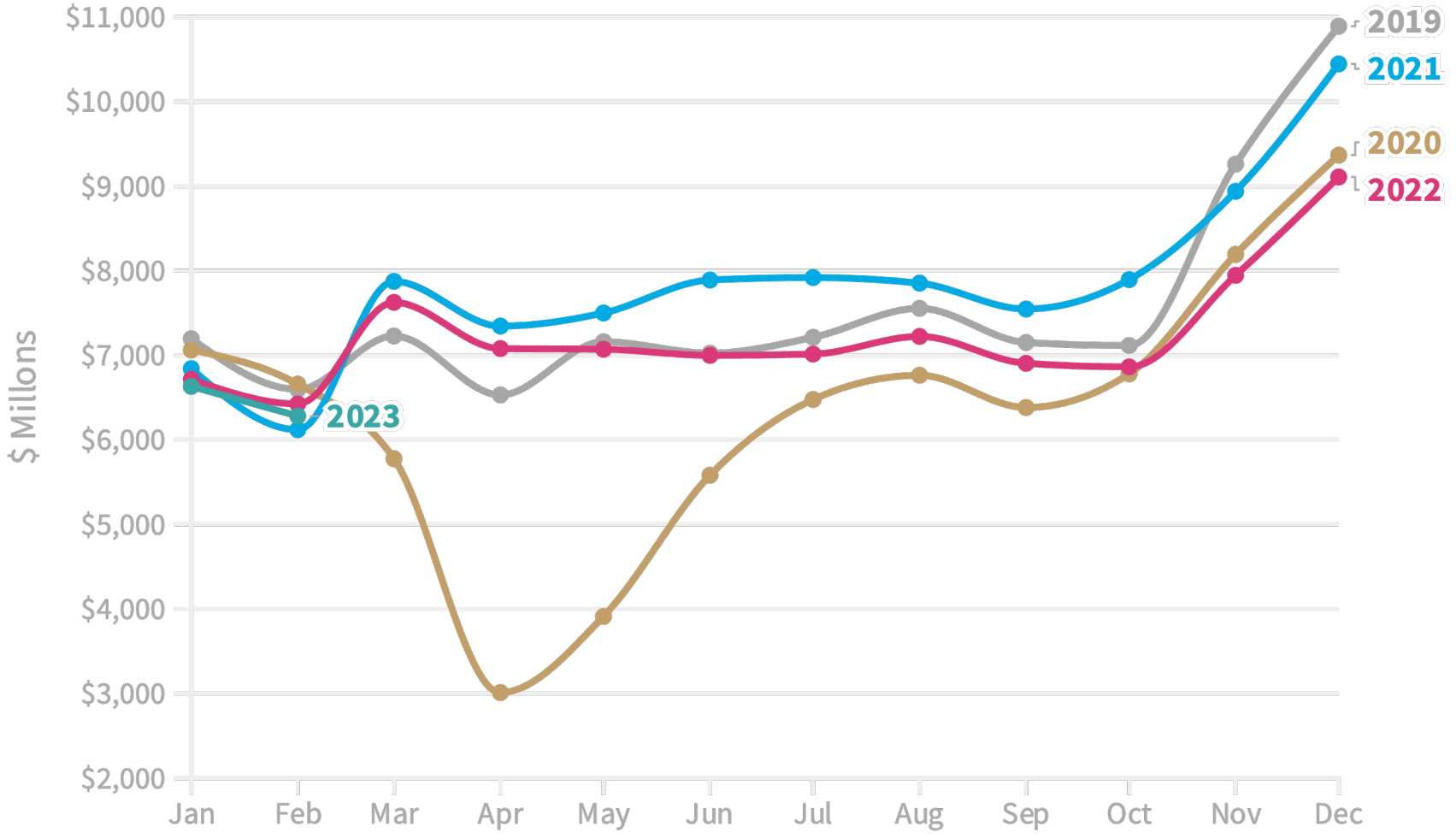
\$13B

-1.7% v 2022

-6.4% 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



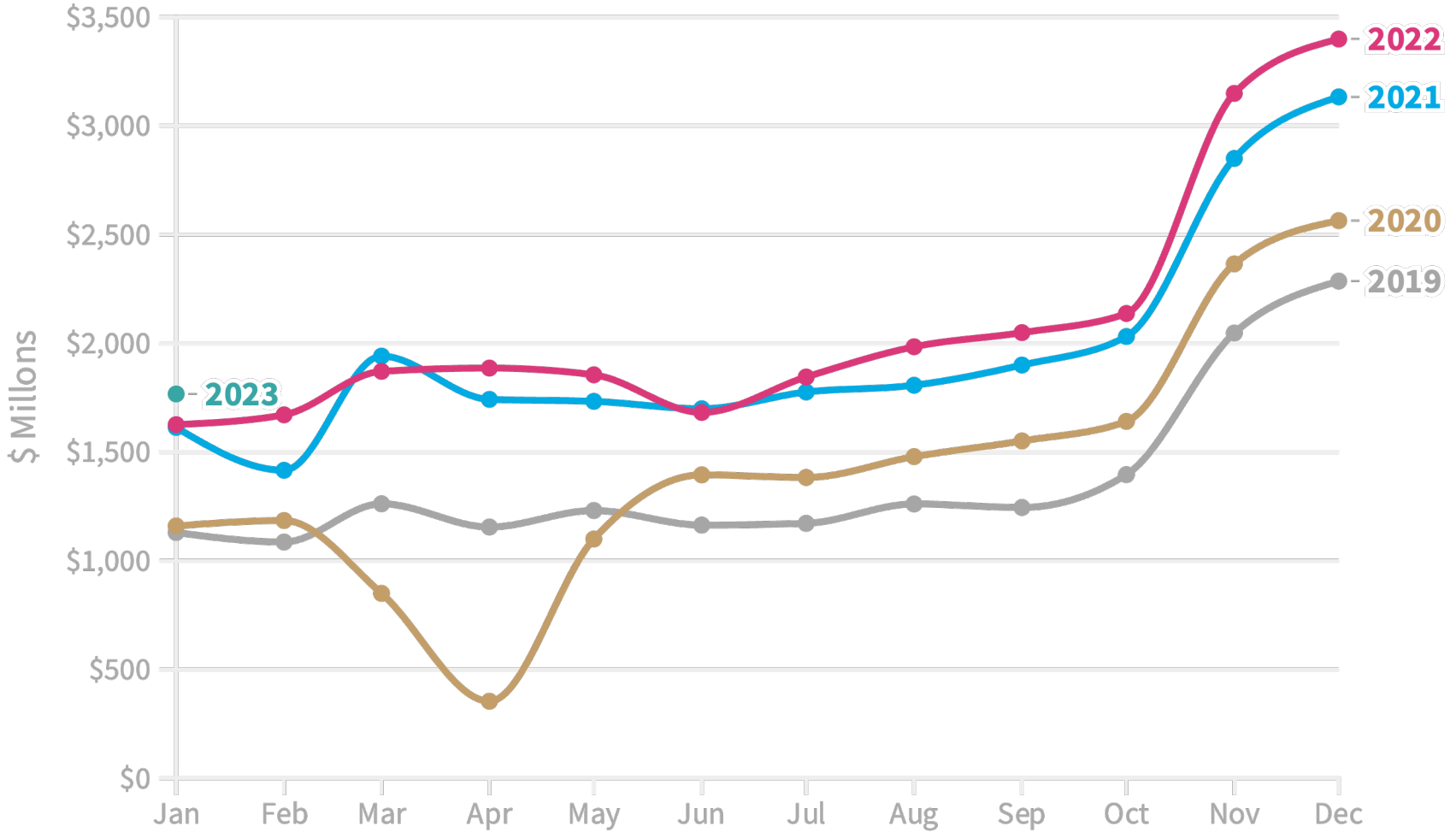
2023 Toys - Jan

\$1.8B

+8.7% v 2022

+56% 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

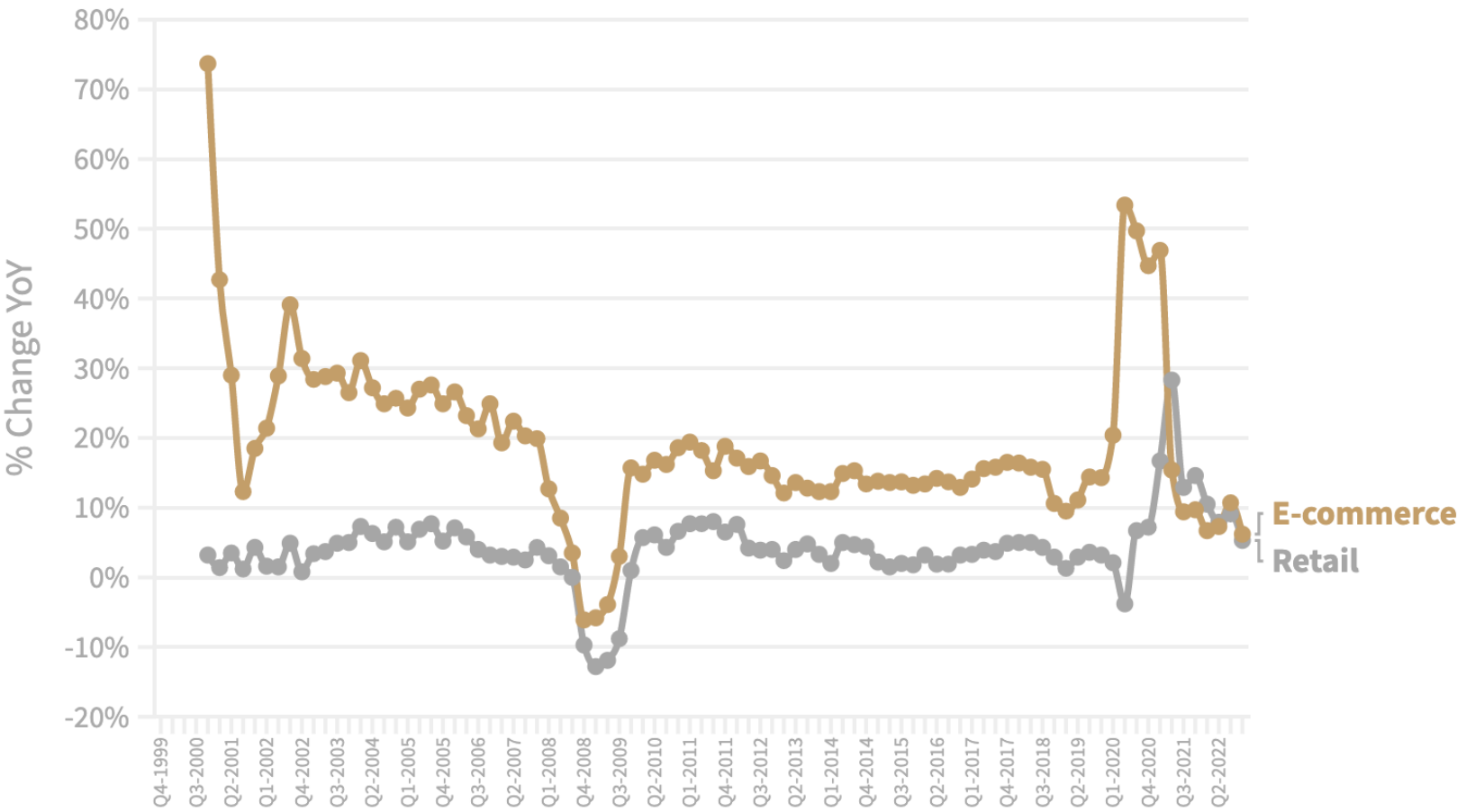
14.6% of US Retail

+8% v 2021

+27% v 2020

+81% v 2019

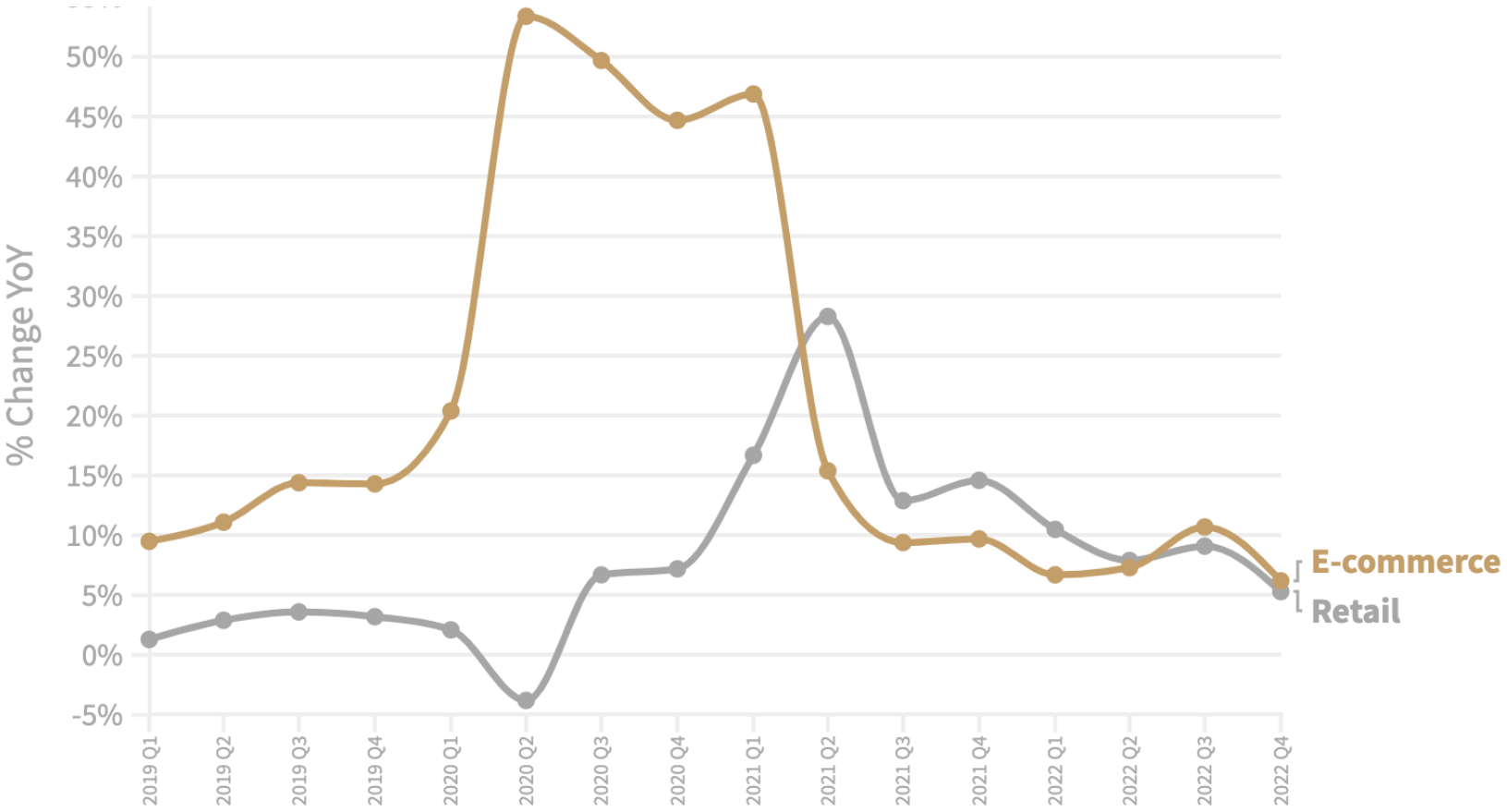
E-Commerce vs Retail YoY Growth



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



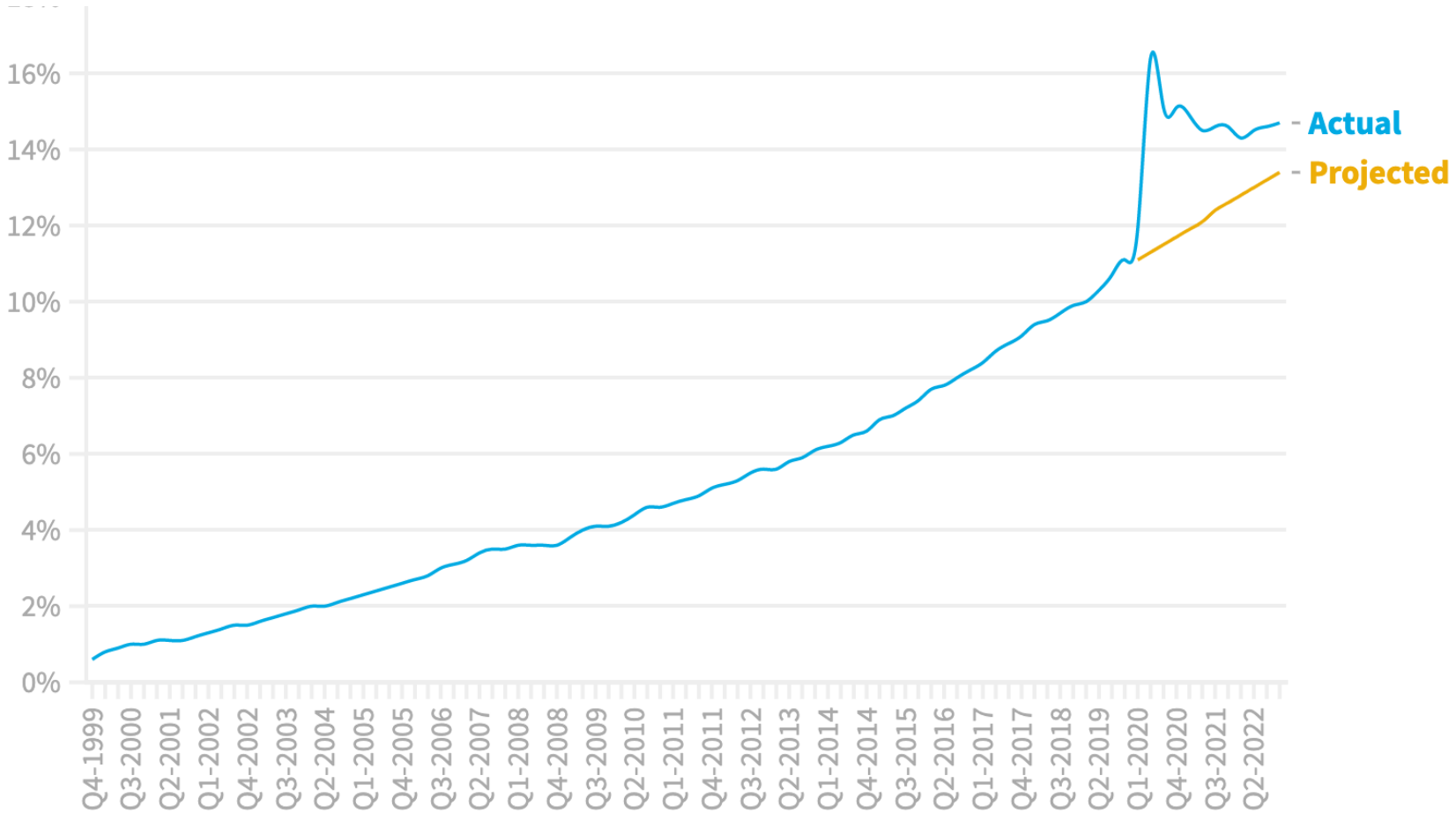
E-Commerce vs Retail YoY Growth



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



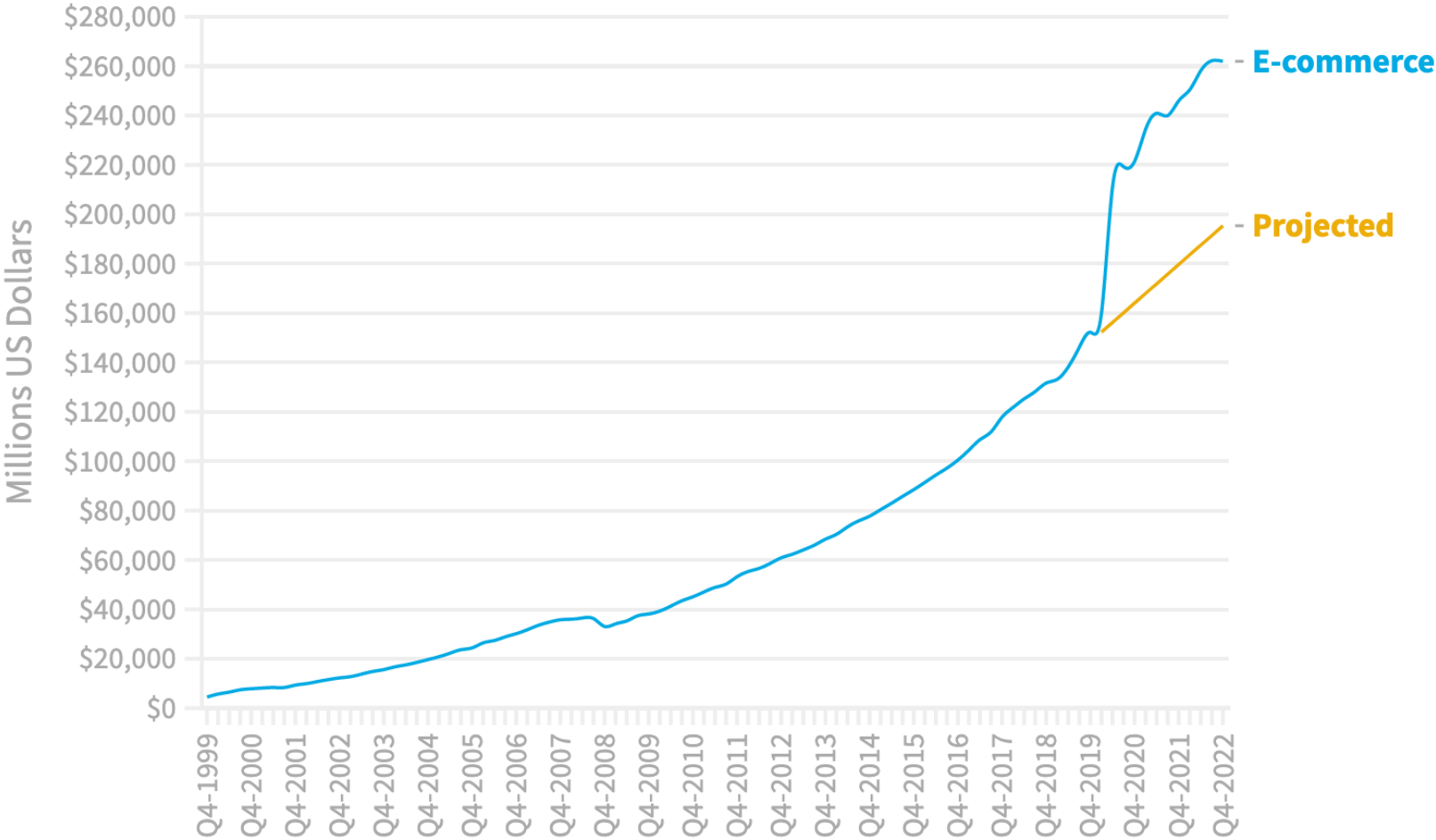
E-Commerce Share of Retail



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



2023 Non-Store Sales Jan-Feb

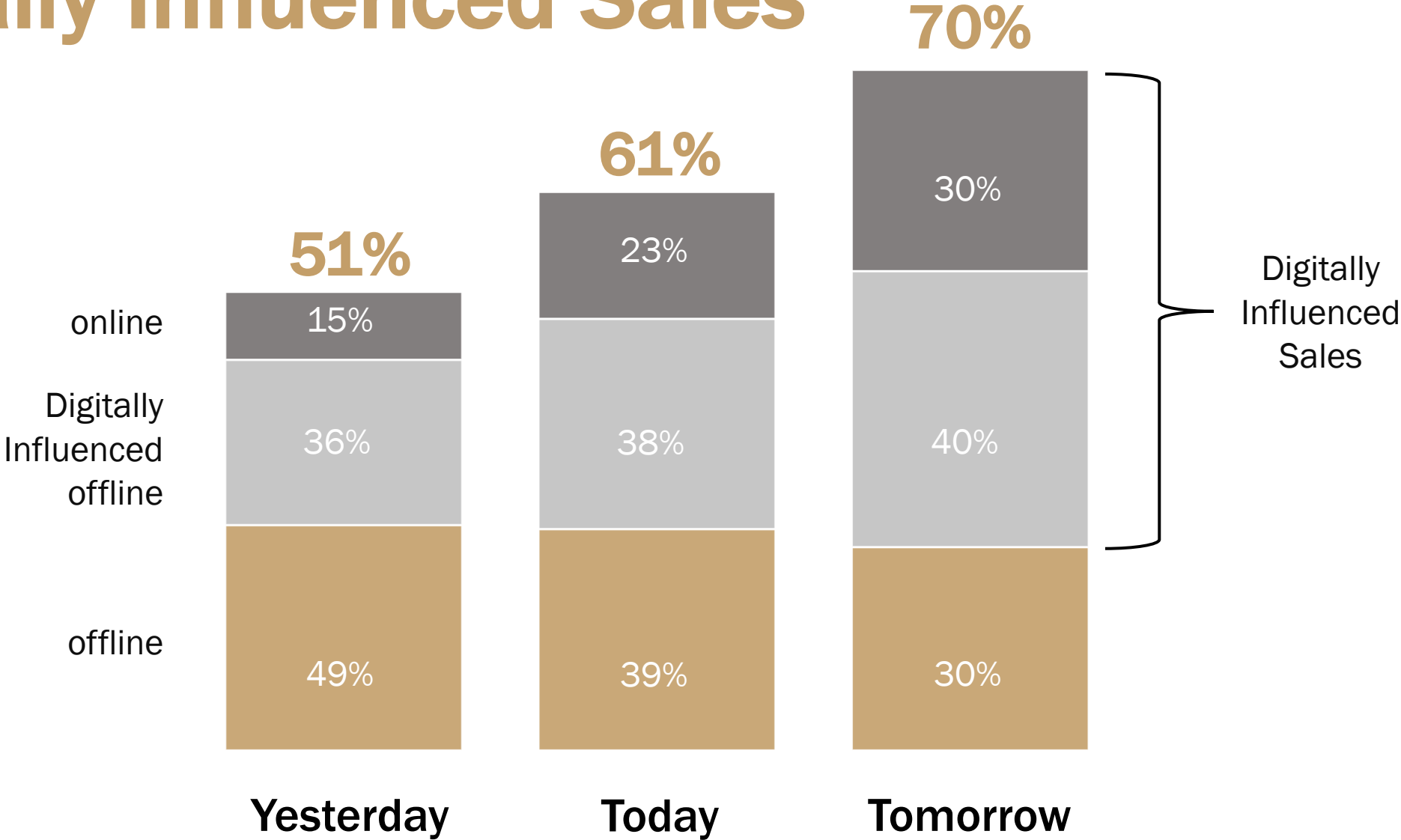
\$209B

+9.2% v 202s

+89% v 2019

19.4% of Retail

Digitally Influenced Sales



Source: Forrester 2022 Digital-Influenced Retail Sales Forecast, US

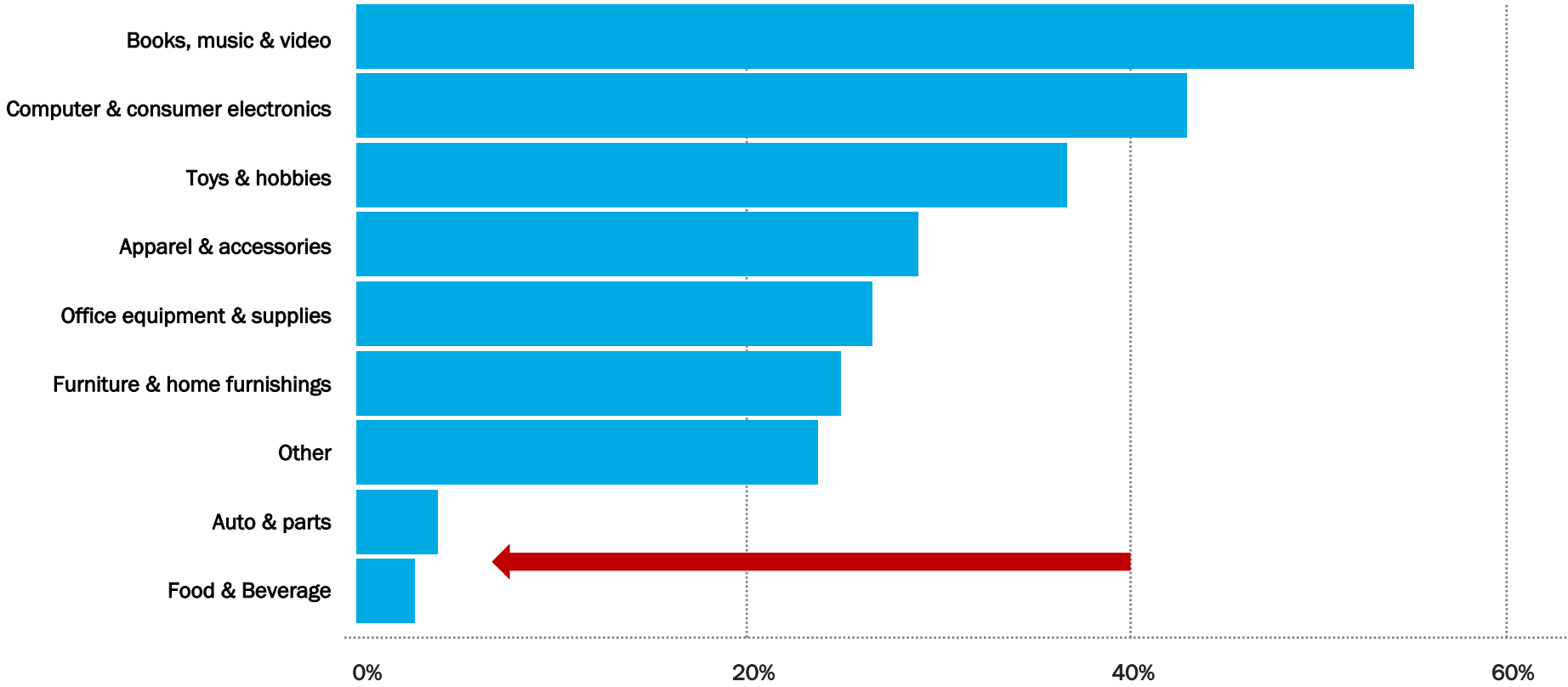
Grocery E-Commerce 2022

\$96.8B

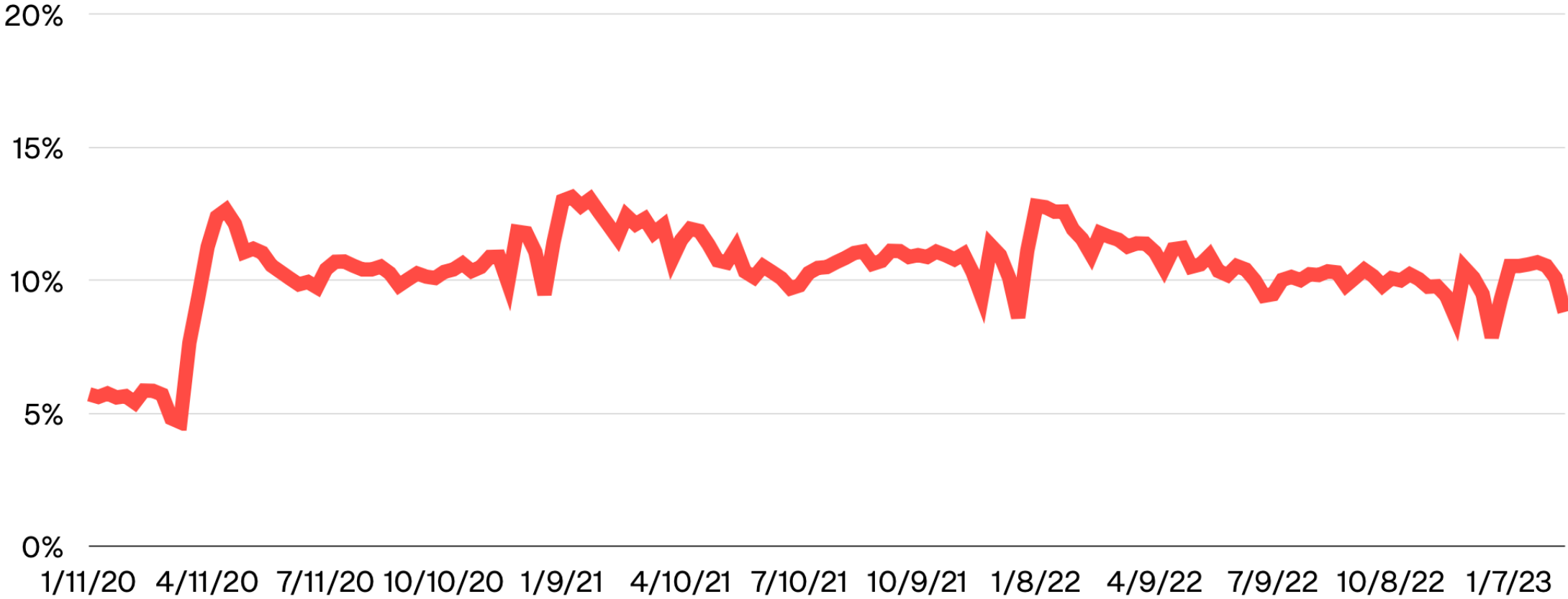
10% of Grocery

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



Kroger– Digital Penetration



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

“

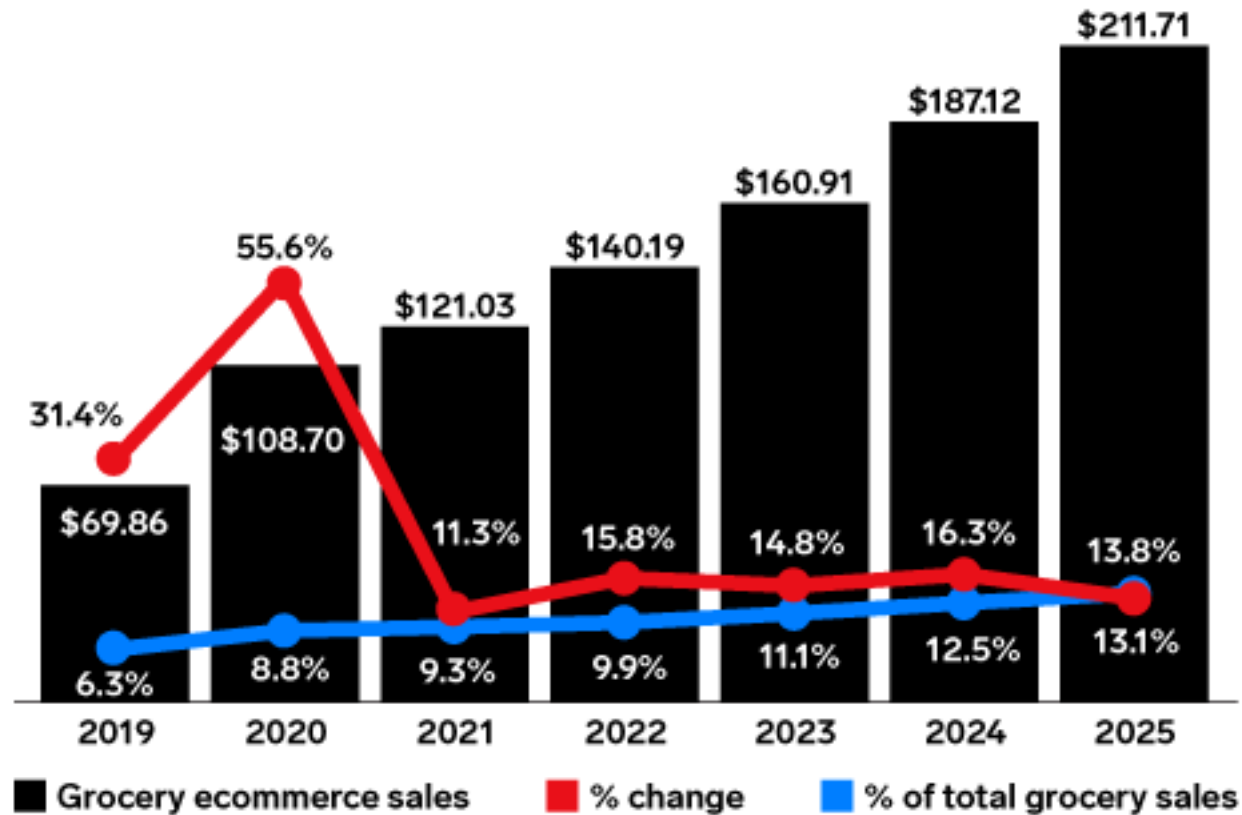
Panera  B R E A D

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

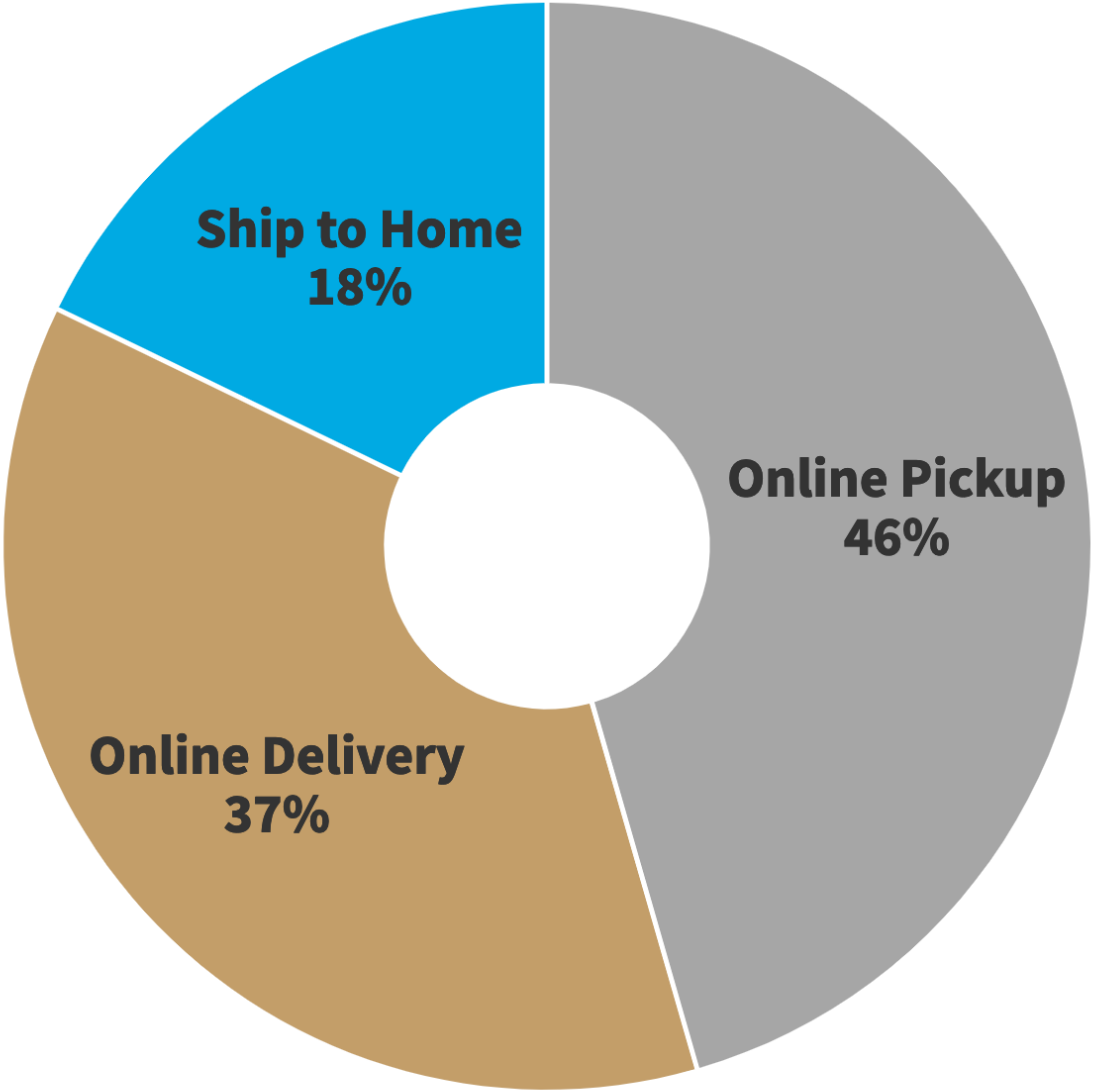
Panera CEO Niren Chaudhary

US Grocery E-Commerce Sales 2019-2025

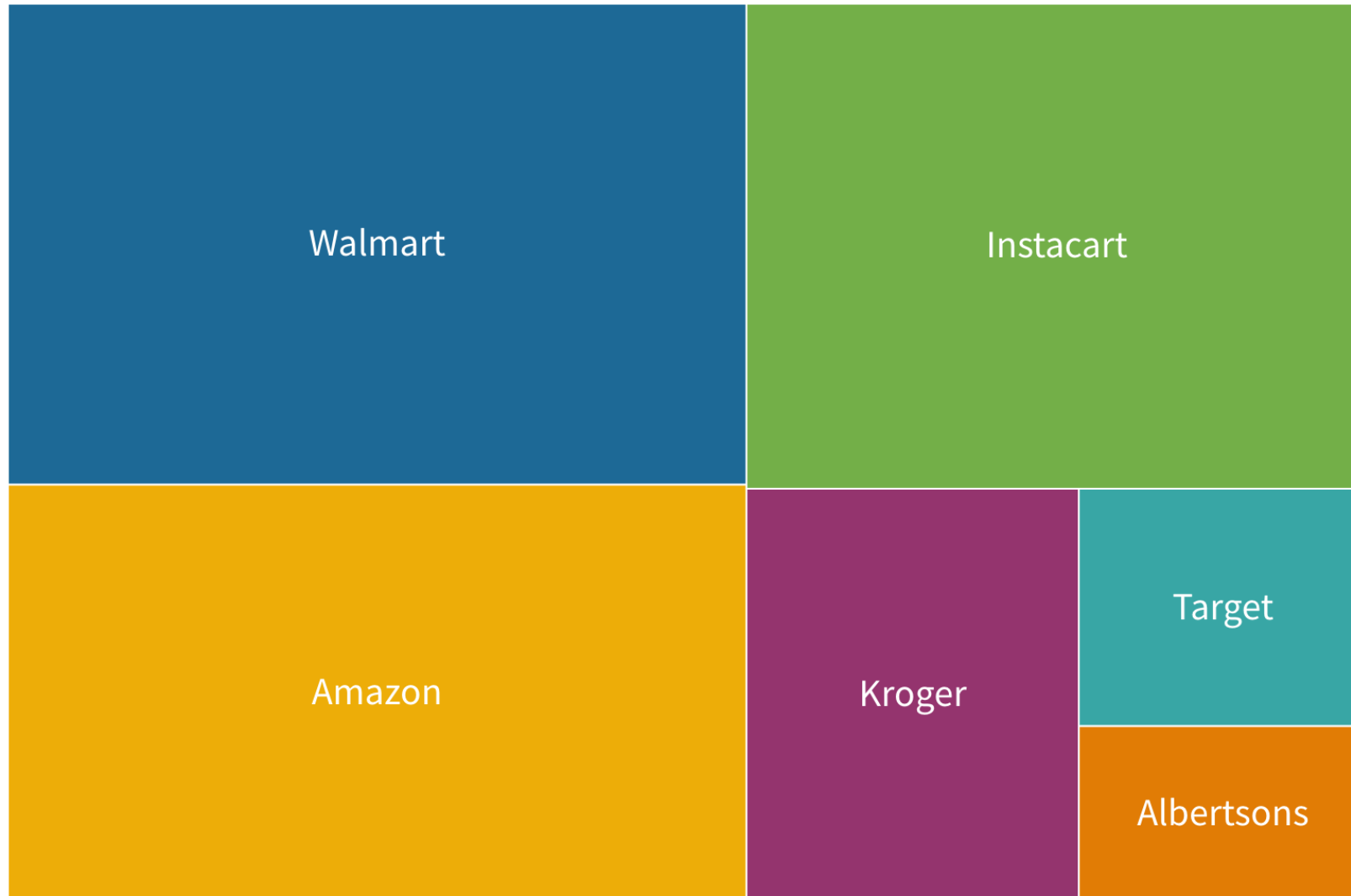
Billions, % Change, and % of total grocery sales



Grocery E-Commerce Delivery Method



Top 6 Grocers Are 87% of Market



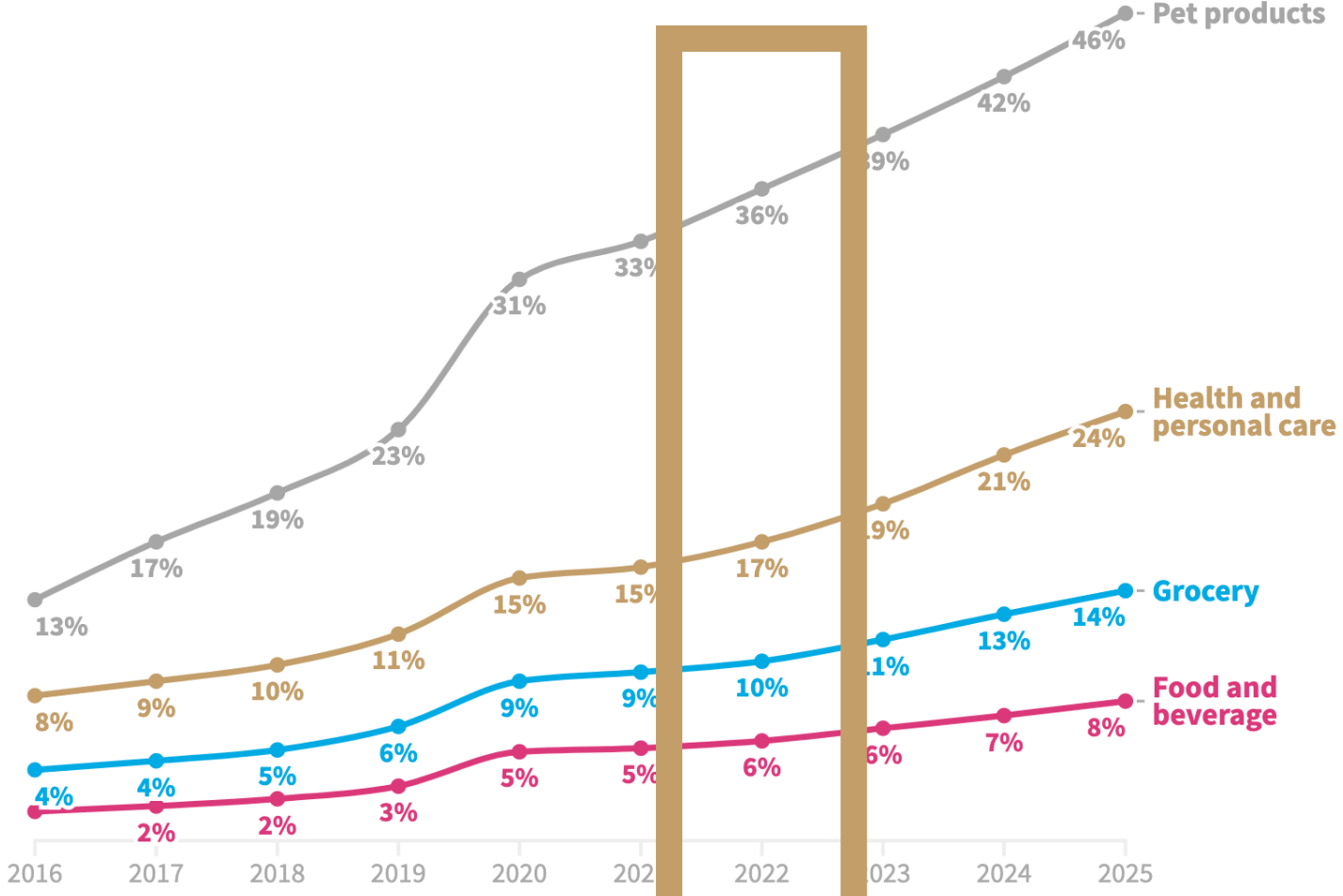
Digital Grocery



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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