

# Kantar's 2019 Top 50 US Retailers

December 2019

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2020E US Rank	2020E Global Rank	2025E US Outlook	Retailer/Parent Company	Home Country	2020E US Retail Sales (\$MM)	2020E US Stores	Sales CAGR ('15-'20E)	Sales CAGR ('20E-'25E)	2020E % Retail Sales Outside US
1	1	◀▶	Walmart <sup>1</sup>	US	\$408,952	5,259	3%	2%	24%
2	2	◀▶	Amazon.com <sup>2</sup>	US	\$155,502	533	22%	14%	36%
3	5	▼	Kroger <sup>3</sup>	US	\$122,269	3,007	2%	3%	0%
4	3	▲	Costco	US	\$119,890	553	7%	6%	26%
5	8	▼	Home Depot	US	\$105,479	1,973	5%	2%	8%
6	6	▲	Walgreens Boots Alliance	US	\$104,634	8,910	6%	4%	12%
7	10	▲	CVS	US	\$93,845	9,927	5%	6%	1%
8	14	◀▶	Target	US	\$81,473	1,886	2%	4%	0%
9	17	▼	Lowe's	US	\$67,397	1,723	3%	3%	7%
10	20	▼	Albertsons Companies	US	\$60,925	2,228	1%	1%	0%
11	19	▲	Apple	US	\$59,328	271	13%	9%	11%
12	16	▼	Ahold Delhaize	Netherlands	\$45,890	2,012	1%	1%	41%
13	33	▲	Publix	US	\$40,809	1,506	5%	4%	0%
14	31	▼	Best Buy	US	\$39,997	994	3%	0%	7%
15	9	▲	Aldi <sup>4</sup>	Germany	\$33,388	2,756	8%	7%	70%
16	29	▼	TJX Companies	US	\$33,009	3,343	7%	3%	24%
17	39	▲	Dollar General	US	\$30,181	17,259	8%	6%	0%
18	45	▼	Macy's	US	\$25,448	889	-1%	2%	0%
19	42	▲	H-E-B	US	\$25,445	337	4%	4%	5%
20	51	▲	Dollar Tree	US	\$24,216	15,352	4%	4%	1%
21	61	▼	Kohl's	US	\$19,383	1,167	0%	2%	0%
22	62	▼	Ace Hardware	US	\$18,353	4,444	4%	3%	5%
23	66	▼	Meijer	US	\$17,862	252	2%	1%	0%
24	12	▼	Seven & I	Japan	\$17,204	8,856	5%	2%	82%
25	69	▲	Ross	US	\$16,984	1,877	7%	4%	0%
26	70	▼	Wakefern	US	\$16,740	355	1%	1%	0%
27	72	◀▶	Nordstrom	US	\$15,711	369	2%	3%	2%
28	76	▼	Rite Aid	US	\$15,581	2,460	-10%	0%	0%
29	86	▼	BJ's	US	\$13,617	222	2%	2%	0%
30	74	▼	Couche-Tard	Canada	\$12,703	6,920	12%	3%	19%
31	92	▼	Menards	US	\$12,326	313	4%	2%	0%
32	100	◀▶	Hy-Vee	US	\$11,698	292	6%	4%	0%
33	82	▼	Qurate Retail	US	\$11,518	N/A	9%	2%	19%
34	93	▼	L Brands	US	\$11,369	2,707	1%	2%	6%
35	105	▼	Health Mart	US	\$11,246	5,088	3%	3%	0%
36	103	▼	Bed Bath & Beyond	US	\$11,205	1,422	-1%	0%	2%
37	110	◀▶	O'Reilly Auto Parts	US	\$10,635	5,549	6%	4%	0%
38	101	▼	AutoZone	US	\$10,370	5,755	4%	3%	11%
39	116	▼	Wegmans	US	\$10,131	108	5%	3%	0%
40	115	▼	J.C. Penney	US	\$10,097	825	-4%	-4%	1%
41	117	▼	Good Neighbor Pharmacy	US	\$10,052	2,863	4%	3%	0%
42	114	▼	Sherwin-Williams	US	\$9,619	4,122	7%	4%	7%
43	122	▲	PetSmart	US	\$9,462	1,536	9%	4%	4%
44	128	▼	Giant Eagle	US	\$9,376	475	1%	1%	0%
45	108	▲	Wayfair <sup>5</sup>	US	\$9,228	N/A	37%	20%	15%
46	132	▼	Speedway	US	\$8,983	4,199	12%	2%	0%
47	134	▲	Ulta	US	\$8,834	1,329	18%	11%	0%
48	135	▲	Tractor Supply	US	\$8,770	2,103	7%	3%	0%
49	131	▲	Old Navy <sup>6</sup>	US	\$8,553	1,016	N/A	11%	6%
50	139	◀▶	Dick's Sporting Goods	US	\$8,450	873	4%	3%	0%

<sup>1</sup> Walmart sold ModCloth to Go Global Retail effective FY 2019. <sup>2</sup> Includes Whole Foods Market. <sup>3</sup> Kroger sold the Turkey Hill business to an affiliate of Peak Rock Capital effective FY 2019. <sup>4</sup> Includes Trader Joe's and Aldi Sued. <sup>5</sup> Wayfair's only physical store is considered a showroom by our analysts. <sup>6</sup> Old Navy spinoff of Gap effective FY 2019.

All figures are estimates based on FY 2019 YTD results (reported in September/October 2019).

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# Kantar's 2019 Top 50 Global Retailers (USD)

December 2019

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2020E Global Rank	2025E Global Outlook	Retailer/Parent Company	Home Country	2020E Retail Sales (\$MM)	2020E Global Stores	Sales CAGR ('15-'20E)	Sales CAGR ('20E-'25E)	2020E % Retail Sales Outside Home
1	◀▶	Walmart <sup>1</sup>	US	\$536,177	12,000	2%	2%	24%
2	◀▶	Amazon.com <sup>2</sup>	US	\$244,721	556	22%	14%	36%
3	▼	Costco	US	\$161,159	813	7%	7%	26%
4	▼	Schwarz Group	Germany	\$132,749	12,592	7%	5%	66%
5	▼	Kroger	US	\$122,269	3,007	2%	3%	0%
6	▼	Walgreens Boots Alliance	US	\$118,477	14,874	5%	4%	12%
7	▲	JD.com <sup>3</sup>	China	\$115,560	N/A	29%	16%	0%
8	▼	Home Depot	US	\$114,130	2,293	5%	3%	8%
9	▲	Aldi <sup>4</sup>	Germany	\$112,338	12,169	5%	5%	72%
10	◀▶	CVS	US	\$95,182	10,010	5%	6%	1%
11	▼	Carrefour	France	\$95,071	12,252	-1%	3%	57%
12	▲	Seven & I	Japan	\$94,809	37,143	5%	4%	24%
13	▼	Tesco	United Kingdom	\$84,578	12,870	0%	1%	26%
14	▼	Target	US	\$81,473	1,886	2%	4%	0%
15	◀▶	Aeon	Japan	\$78,620	13,777	4%	4%	8%
16	▼	Ahold Delhaize	Netherlands	\$77,172	7,276	2%	2%	78%
17	▼	Lowe's	US	\$72,651	2,256	4%	3%	7%
18	▼	Auchan	France	\$68,536	4,146	0%	2%	66%
19	▲	Apple	US	\$66,487	509	12%	8%	11%
20	▼	Albertsons Companies	US	\$60,925	2,228	1%	1%	0%
21	▲	Alibaba <sup>5</sup>	China	\$57,571	308	35%	13%	3%
22	◀▶	Casino	France	\$52,746	13,456	0%	6%	52%
23	▼	Rewe	Germany	\$52,037	11,829	4%	4%	32%
24	▲	Ikea	Sweden	\$51,957	466	7%	7%	96%
25	▼	Edeka	Germany	\$47,468	12,432	1%	2%	0%
26	▲	Suning <sup>3</sup>	China	\$45,190	4,920	17%	6%	5%
27	▼	Leclerc	France	\$43,929	2,010	2%	1%	4%
28	▲	FamilyMart UNY	Japan	\$43,818	25,039	5%	6%	10%
29	▲	TJX Companies	US	\$43,537	4,647	7%	3%	24%
30	◀▶	Intermarché	France	\$43,422	3,672	1%	3%	13%
31	▼	Best Buy	US	\$42,903	1,211	3%	0%	7%
32	▲	Woolworths Limited (Aus)	Australia	\$41,871	3,036	0%	3%	13%
33	▲	Publix	US	\$40,809	1,506	5%	4%	0%
34	▼	Metro AG <sup>5</sup>	Germany	\$40,401	8,858	0%	2%	71%
35	▲	A.S. Watson	Hong Kong	\$36,311	16,341	4%	5%	79%
36	▼	Sainsbury's	United Kingdom	\$34,553	1,988	0%	2%	0%
37	▲	China Resources Enterprise	China	\$30,312	6,288	10%	10%	3%
38	◀▶	Mercadona	Spain	\$30,254	1,647	7%	6%	0%
39	▲	Dollar General	US	\$30,181	17,259	8%	6%	0%
40	▼	Loblaw	Canada	\$29,473	2,423	1%	4%	0%
41	▲	X5 Retail Group	Russia	\$27,459	17,896	16%	6%	0%
42	▼	H-E-B	US	\$26,659	403	4%	3%	5%
43	▼	Coles <sup>6</sup>	Australia	\$26,534	2,468	-1%	3%	0%
44	▼	H&M	Sweden	\$25,958	5,203	4%	4%	96%
45	▼	Macy's	US	\$25,572	893	-1%	2%	0%
46	▲	Adeo Group	France	\$25,570	1,066	8%	6%	66%
47	▲	Fast Retailing	Japan	\$25,305	3,407	12%	7%	54%
48	▲	Dairy Farm	Hong Kong	\$24,943	6,216	7%	6%	85%
49	▲	Lawson	Japan	\$24,855	18,203	8%	5%	3%
50	▲	Coop Schweiz	Switzerland	\$24,617	2,200	2%	5%	24%

<sup>1</sup> Divested Brazil operation to Grupo Big effective FY 2020. <sup>2</sup> Includes Whole Foods Market. <sup>3</sup> Direct sales only, not GMV. <sup>4</sup> Combines Aldi Nord, Trader Joe's, and Aldi Sued. <sup>5</sup> Divested China operation to Wumart effective FY 2020. <sup>6</sup> Wesfarmers spun off Coles as an independent entity effective FY 2019.

All figures are estimates based on FY 2019 YTD results (primarily reported in September/October 2019).

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# Kantar's 2019 Top 50 Global Retailers (EUR)

December 2019

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2020E Global Rank	2025E Global Outlook	Retailer/Parent Company	Home Country	2020E Retail Sales (€MM)	2020E Global Stores	Sales CAGR ('15-'20E)	Sales CAGR ('20E-'25E)	2020E % Retail Sales Outside Home
1	◀▶	Walmart <sup>1</sup>	US	€ 478,524	12,000	2%	2%	24%
2	◀▶	Amazon.com <sup>2</sup>	US	€ 218,407	556	22%	13%	36%
3	▼	Costco	US	€ 143,830	813	7%	6%	26%
4	▼	Schwarz Group	Germany	€ 118,475	12,592	6%	5%	66%
5	▼	Kroger	US	€ 109,122	3,007	2%	2%	0%
6	▼	Walgreens Boots Alliance	US	€ 105,737	14,874	5%	3%	12%
7	▲	JD.com <sup>3</sup>	China	€ 103,134	N/A	28%	15%	0%
8	▼	Home Depot	US	€ 101,858	2,293	5%	2%	8%
9	▲	Aldi <sup>4</sup>	Germany	€ 100,259	12,169	5%	4%	72%
10	◀▶	CVS	US	€ 84,948	10,010	5%	5%	1%
11	▼	Carrefour	France	€ 84,848	12,252	-1%	2%	57%
12	▲	Seven & I	Japan	€ 84,615	37,143	5%	3%	24%
13	▼	Tesco	United Kingdom	€ 75,483	12,870	0%	0%	26%
14	▼	Target	US	€ 72,713	1,886	2%	3%	0%
15	◀▶	Aeon	Japan	€ 70,167	13,777	4%	4%	8%
16	▼	Ahold Delhaize	Netherlands	€ 68,874	7,276	2%	1%	78%
17	▼	Lowe's	US	€ 64,839	2,256	4%	2%	7%
18	▼	Auchan	France	€ 61,167	4,146	0%	1%	66%
19	▲	Apple	US	€ 59,338	509	12%	8%	11%
20	▼	Albertsons Companies	US	€ 54,374	2,228	1%	0%	0%
21	▲	Alibaba <sup>5</sup>	China	€ 51,380	308	35%	12%	3%
22	◀▶	Casino	France	€ 47,074	13,456	0%	5%	52%
23	▼	Rewe	Germany	€ 46,442	11,829	3%	3%	32%
24	▲	Ikea	Sweden	€ 46,371	466	7%	6%	96%
25	▼	Edeka	Germany	€ 42,364	12,432	1%	2%	0%
26	▲	Suning <sup>3</sup>	China	€ 40,331	4,920	17%	6%	5%
27	▼	Leclerc	France	€ 39,206	2,010	1%	1%	4%
28	▲	FamilyMart UNY	Japan	€ 39,106	25,039	5%	5%	10%
29	▲	TJX Companies	US	€ 38,855	4,647	7%	3%	24%
30	◀▶	Intermarché	France	€ 38,753	3,672	1%	2%	13%
31	▼	Best Buy	US	€ 38,290	1,211	3%	0%	7%
32	▲	Woolworths Limited (Aus)	Australia	€ 37,369	3,036	0%	3%	13%
33	▲	Publix	US	€ 36,421	1,506	5%	4%	0%
34	▼	Metro AG <sup>5</sup>	Germany	€ 36,057	8,858	0%	1%	71%
35	▲	A.S. Watson	Hong Kong	€ 32,406	16,341	4%	4%	79%
36	▼	Sainsbury's	United Kingdom	€ 30,838	1,988	-1%	1%	0%
37	▲	China Resources Enterprise	China	€ 27,053	6,288	10%	9%	3%
38	◀▶	Mercadona	Spain	€ 27,001	1,647	7%	5%	0%
39	▲	Dollar General	US	€ 26,936	17,259	8%	6%	0%
40	▼	Loblaw	Canada	€ 26,304	2,423	1%	3%	0%
41	▲	X5 Retail Group	Russia	€ 24,507	17,896	16%	5%	0%
42	▼	H-E-B	US	€ 23,792	403	4%	3%	5%
43	▼	Coles <sup>6</sup>	Australia	€ 23,681	2,468	-1%	2%	0%
44	▼	H&M	Sweden	€ 23,167	5,203	3%	4%	96%
45	▼	Macy's	US	€ 22,822	893	-1%	1%	0%
46	▲	Adeo Group	France	€ 22,821	1,066	8%	5%	66%
47	▲	Fast Retailing	Japan	€ 22,584	3,407	12%	6%	54%
48	▲	Dairy Farm	Hong Kong	€ 22,261	6,216	7%	6%	85%
49	▲	Lawson	Japan	€ 22,182	18,203	8%	4%	3%
50	▲	Coop Schweiz	Switzerland	€ 21,970	2,200	2%	4%	24%

<sup>1</sup> Divested Brazil operation to Grupo Big effective FY 2020. <sup>2</sup> Includes Whole Foods Market. <sup>3</sup> Direct sales only, not GMV. <sup>4</sup> Combines Aldi Nord, Trader Joe's, and Aldi Sued. <sup>5</sup> Divested China operation to Wumart effective FY 2020. <sup>6</sup> Wesfarmers spun off Coles as an independent entity effective FY 2019.

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