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# Presence

PRESENCE MARKETING DYNAMIC PRESENCE

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## Presence News

### Inside Whole Foods Market's Town Hall at Expo West 2017

Whole Foods Market hosted a Town Hall meeting at Expo West, featuring remarks from CEO and Founder John Mackey, Global VP of Purchasing Don Clark, VP of Marketing Sonya Gafsi Oblisk, Executive VP and CIO Jason Buechel, and President and COO AC Gallo.

John Mackey delivered opening remarks, noting this was his first time attending Expo West in 15 years and reflecting on the evolution of the industry. Mackey said that his company is going back to its roots by focusing on the core "Whole Foodie" customer and providing world-class customer service. The company's growth plan is much more disciplined and selective in location to avoid cannibalization. The company intends to be less patient with underperforming stores returning negative comps and recognizes that some stores may close as a result. Referring to new category management strategies, Mackey said that the company is moving to a hybrid purchasing model based in Austin that will be accelerated by partnerships with Neilson and dunnhumby. The goal is to target savings that will allow the company to focus on lowering prices.

Mackey then addressed the Whole Foods Market brand. "We live in a world that basically thinks corporations suck. We are going to continue to advertise and defend our brand. We are not going to disappear," Mackey stated. The emphasis will be on changing the negative public perception of the Whole Foods Market brand that is often perpetuated by the media. Mackey outlined several customer service programs such as growing the data-based loyalty program and its ties to purchasing, expanding home delivery via Instacart, and enhancing meal solutions with grab-and-go options. A new focus on inventory control with order-to-shelf programs will allow Whole Foods Market to cut inventory while keeping shelves stocked. Finally, Mackey said, an overarching goal will be advancing the company's involvement in technology by making it the center of everything going forward.

Mackey turned the mic over to Global VP of Purchasing Don Clark who discussed the "massive metamorphosis" the company's purchasing operations are currently undergoing. He addressed flaws in the previous system with 12 decentralized regions, over 400 decision makers and unhappy supplier relationships, which lead to inefficiency and a need for change. In addition to creating a new Supplier Advisory Counsel, over the past year, Whole Foods Market has been working toward building a centralized category management operation out of Austin through strategic partnerships with Nielsen and dunnhumby. The aim is to build a streamlined and data rich system, while continuing to be a leader in unique assortments and local relevance. According to Clark, "By spring 2018, every category will have at least begun the process of transitioning over to Whole Foods Market's new national category management structure."

Whole Foods Market's VP of Marketing Sonya Gafsi Oblisk, formerly with Walmart, addressed the need to reframe public perception of the Whole Foods Market brand. For example, replacing the "high prices" brand association with the idea that quality is "worth the value". This will require marketing efforts that actively convey the meaningful benefits of the company's class-leading standards. The focus of the marketing team will continue to be differentiation, quality and company mission through marketing, ecommerce and affinity programs.

Jason Buechel, Executive VP and Chief Information Officer, spoke on the topic of technological advancements. The Whole Foods Market technology roadmap addresses three interconnected spheres: team members, customers and products. Technology enhancements are currently underway in payroll, benefits and team member development. The customer technology platform is targeting one POS program for a streamlined view of sales flow. Data will be shared with Nielson and dunnhumby. Advancements in technology in the product sector include new ordering and receiving structure to connect all partners and a new system to understand the transparency of the supply chain. Eliminating cumbersome ordering and receiving practices will improve team member efficiency and increase speed to market.

President and COO AC Gallo culminated the address by saying that Whole Foods Market is currently undergoing more change than he has seen in all his time with the company.

*"By spring 2018, every category will have at least begun the process of transitioning over to Whole Foods Market's new national category management structure", Don Clark, Whole Foods Market Global VP of Purchasing*

## Southwest

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## Whole Foods Market Launches 12<sup>th</sup> Annual Prosperity Campaign

Whole Planet Foundation launched its 12<sup>th</sup> annual Prosperity Campaign aimed at alleviating global poverty where Whole Foods Market sources its products from around the world. With the support of customers, team members, suppliers, and online donors, Whole Foods Market hopes to exceed its \$3.2 million goal this year. The campaign, which focuses on empowering entrepreneurial women in impoverished areas, has provided microloans to over 1.9 million women in 70 countries. The average first loan is \$187, with a 97% repayment rate. Once the loan is repaid, the funds are redistributed to new entrepreneurs. Additionally, the foundation is solely funded by Whole Foods Market, ensuring 100% of every dollar raised is put towards advancing those in need.



"The Prosperity Campaign is such an integral part of our work, not only because of the money we are able to raise, but because of the connections we make with Whole Foods Market customers who care about alleviating poverty," said Joy Stoddard, Development and Outreach Director for Whole Planet Foundation. "A loan as small as \$35 can change someone's life and this campaign allows us all to contribute."

The campaign is still live and those able are encouraged to donate. If interested, please visit [www.wholeplanetfoundation.org](http://www.wholeplanetfoundation.org) to learn more.

## Albertsons Combining Houston and Southern Divisions

Albertsons Co. announced last month that it is merging the Houston and Southern Divisions. The move will consolidate marketing, merchandising and distribution under the Fort Worth-based Southern Division, effectively strengthening purchasing power and operational focus for stores in Houston and Louisiana. The Southern division will grow to 165 stores under the Albertsons, Tom Thumb and Randalls banners. The move will not affect the Lubbock-based United Supermarkets division.



The company is closing its distribution center in Telge, Texas that primarily served the Houston Division's Randalls banner. Those stores will now be served by the Roanoke distribution center near Dallas-Fort Worth, which also supplies Tom Thumb and Albertsons stores in North Texas.

The company will maintain a small operations office out of Houston, but many of the functions will move to the Southern division. In addition to the reduction in Houston Division staff, there are 205 Telge distribution center employees that will be affected. Some positions will be able transfer to Fort Worth while others, with the help of Albertsons Co, must find employment elsewhere. The consolidation is currently underway and is expected to be complete by late summer 2017.

## Natural Grocers Opens New Store in San Antonio

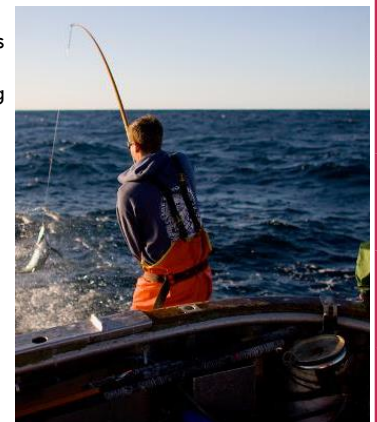
Natural Grocers celebrated the grand opening of a new store in San Antonio, Texas at Alamo Heights on March 29<sup>th</sup>. The new 15,000 square foot store is the second Natural Grocers location in the city. Grand opening day festivities included a ribbon-cutting ceremony with free muffins for guests. The first 150 customers in line received a Natural Grocers t-shirt. The store hosted vendor demonstrations throughout the store and at the end of the day customers were treated to an Ice Cream Social. The store offered '7 Days of Daily Deals' during grand opening week featuring discounts for one day only on items such as bacon, butter, chocolate and eggs. In addition to organic foods, supplements and body care products, Natural Grocers in Alamo Heights will have health coach on staff and a community room where customers can come to learn about nutrition and healthy eating.



## Whole Foods Market Commits to Sustainable, Traceable Canned Tuna

By January of 2018, Whole Foods Market will become the first retailer to require all canned tuna to meet rigorous sustainability and traceability requirements. The new sustainability program aims to reduce overfishing and bycatch, and to support fishing communities by requiring all canned tuna products to come from fisheries employing one-by-one catch methods, such as pole-and-line, troll or handline catching. The policy expands on the retailer's existing sustainability standards for fresh and frozen seafood by including both canned tuna sold the grocery aisle and tuna used in prepared foods. All seafood must either be certified sustainable by the Marine Stewardship Council or rated green or yellow by the Monterey Bay Aquarium and The Safina Center.

Additionally, all suppliers will be required to use Trace Register, a traceability software that helps verify sourcing and prevent illegal, unreported and unregulated caught fish from entering the supply chain by tracking each lot of fish from the point of harvest to the shelf. "We created this new policy for canned tuna because we want to lead by example in sourcing only the highest-quality, sustainably caught tuna," said Carrie Brownstein, Global Seafood Quality Standards Coordinator for Austin, Texas-based Whole Foods Market. "Combined with better international fishery management, overfishing and bycatch can be greatly reduced when tuna is caught by these low-impact fishing methods." The traceability methods are in line with the requirements in NOAA's Seafood Import Monitoring Program, which also has a deadline for compliance by January 1<sup>st</sup>, 2018.



## Tulsa Homeland Store to Undergo Facelift and Assortment Changes

A popular Homeland store in Tulsa, Oklahoma is undergoing a \$2 million remodel to update the outdated façade and interior. This store, built at NW 18 and Classen Street in the '70s, has received numerous customer requests for upgrades to the store as well as the product assortment. "It's quite possible the company realized that the reports of Walmart, other grocery stores circling downtown are true and it's time to either step up and preserve its share of the downtown market or face losing the store all together," said The Oklahoman's Steve Lackmeyer. Changes inside the 22,000 square foot store will include a new organic and fresh foods area with prepared salads and ready-to-eat meals. There will be a new in-house bakery and deli with sushi, pizza, and sandwiches.



## Reasor's Closes Second Former Food Pyramid Location in Tulsa

Tahlequah, Oklahoma-based Reasor's announced it would close one of its Tulsa locations at 51<sup>st</sup> Street and Harvard Avenue on May 1<sup>st</sup>. It is the second store to close of the three stores it acquired from Food Pyramid in 2013. Unlike the store at Brookside, which will remain open for the time being, Reasor's did not invest in the renovation of the 51<sup>st</sup> street store after the acquisition. Brent Edstrom, Reasor's Chief Operating Officer, cited oversaturation of the Tulsa grocery market as one of the reasons for the closure. "Three years ago when the Food Pyramids left town, Tulsa was overstored – that was part of what that consolidation was all about," said Edstrom. "Since then, look at all the Walmart Neighborhoods, couple of Sprouts, and Trader Joe's and Costco have all hit town."



In addition to the store's lease expiring at the end of 2017, Reasor's currently operates three stores in a five-mile radius of the closing store, all of which have undergone recent upgrades. Cutting down on cannibalization should have an immediate effect on sales at surrounding stores. It is possible Reasor's may use profits from the sale to fund a new venture in downtown Tulsa anchoring a 12-story mixed-use development. The project, located at 2<sup>nd</sup> and 3<sup>rd</sup> Streets between Cincinnati and Detroit avenues, is still in the planning stages. The grocer currently operates 19 stores in northeastern Oklahoma.

## H-E-B Expands Grocery Delivery to Waco

H-E-B has expanded its grocery delivery to the city of Waco in Central Texas. The grocer first partnered with Shipt in May last year to service its headquarter city of San Antonio. The extension of the partnership means H-E-B will have grocery delivery capabilities for more than 3.6 million busy Texas families. Waco residents who signed up for annual memberships at the start of the program received a \$15 credit on their first order. The Shipt/H-E-B partnership runs off the Shipt app, where customers browse products, add them to their online cart, select preferences and pay for their order. Shipt team members handpick orders and deliver in as little as one hour. "We are always looking for new and innovative ways to make the grocery shopping experience more convenient for H-E-B shoppers," said Leslie Sweet, public affairs director at H-E-B. "H-E-B shoppers across all markets have had an incredibly positive response to adding Shipt grocery delivery to our service offerings, and we are looking forward to growing our partnership with the launch of service in Waco." Annual Shipt memberships are \$99, which waives shipping fees for orders over \$35. Orders under \$35 incur a \$7 delivery fee; however, Shipt says it does not utilize surge pricing, even during peak times.



## Brookshire's Cancels Shreveport Holiday Show

Brookshire Grocery has cancelled the 2017 Holiday Shipper Show on May 2<sup>nd</sup> in Shreveport, Louisiana. Traditionally Brookshire has one annual Shreveport convention meeting; this year would break that cycle and would become a bi-annual event. Brookshire decided to forgo two regional meetings and hold one meeting in October. As it rolls downhill, this means that the Holiday Shipper Show has been effectively cancelled for May. If you have any concerns that you would like Brookshire Grocery or UNFI to address, please contact Presence Marketing's Bruce Counley at [bcounley@pmidpi.com](mailto:bcounley@pmidpi.com) or Dynamic Presence's Robert Starr at [rstarr@pmidpi.com](mailto:rstarr@pmidpi.com).

## New Seasons Market Plans First Store Location in San Francisco

On March 2<sup>nd</sup>, New Seasons Market announced plans to open a store in the heart of Hayes Valley, San Francisco. This will be a nearly 29,000 square foot store. It is New Seasons first San Francisco location. The opening date is to be determined. This location will be managed and operated by New Seasons headquarters in Portland, Oregon.

"We are excited to come to San Francisco and join the Hayes Valley and Western Addition neighborhoods," said CEO Wendy Collie. "Our stores are about community and bringing people together around delicious food, shared meals and a place where you can see your neighbors, and connect with each other. We're looking forward to providing a warm, inviting gathering place where everyone feels welcome."

**Northwest**



## New Seasons Market Plans First Store Location in San Francisco cont'd

The New Seasons Market story began in 1999 when three families asked the question: "What if we created a store that celebrated a living community of food?" This question led to the idea of a neighborhood store committed to connecting with the local community. The three families, along with 50 friends, opened the Raleigh Hills location in 2000 just outside of Portland, with the tagline "The Friendliest Store in Town." While, New Seasons is considered a natural food retailer, it also offers conventional products alongside natural and organic items, a full-service floral department, a wellness and body care department, as well as a unique and broad array of housewares, featuring home goods from several local artisans.

"Our vision of adding a grocery store was always to serve as a gateway for our many different neighborhoods to meet and get to know one another through our common language of food," said Gail Baugh, President of the Hayes Valley Neighborhood Association. "It's been a very long time since we've had such a place to gather. We can't wait for New Seasons to open."

New Seasons currently operates 20 locations in Washington, Oregon and California, as well as four New Leaf Community Market locations in Northern California. They have aggressive plans to open five additional stores over the next two years, including four in Northern California (one New Leaf location) and one in Washington State. Despite New Seasons rapid growth, the chain continues to pride itself on its commitment to sustainable agriculture, environmental stewardship and the local community.

*"Our vision of adding a grocery store was always to serve as a gateway for our many different neighborhoods to meet and get to know one another through our common language of food", Gail Baugh, President, Hayes Valley Neighborhood Association*

## New Independent Grocery Store Comes to Spokane

My Fresh Market, a new independent grocery retailer in Spokane, has chosen Kendall Yards as their new home. The 25,000 square foot store is slated to open in May. Some of the features will be a dining mezzanine that overlooks the Spokane River and a variety of grab-n-go and prepared items that can be enjoyed in a cafe-like setting. They will offer beer, cider and a kombucha growler station, organic and locally sourced produce, a bakery, a deli and a space for in-store events like cooking classes and a wine club, to be enjoyed along with entertainment.



Kendall Yards is a newly developed urban neighborhood (atop an old railyard) just north of the Spokane River in downtown Spokane. The thriving area has great local restaurants, live outdoor music, a summer farmer's market, condo living, and a variety of retailers.

In an interview from the Spokesman Review, Frank was quoted saying, "The millennial generation in particular is focused on going out together and sharing food together. The whole grocery business is evolving, it's our goal to serve not only Kendall Yards, but the balance of the West Central neighborhood. We hope My Fresh Market will be a catalyst for additional residential development."

## Market of Choice Introduces John Boyle as New Vice President, Commits to SPINS

Market of Choice named John Boyle as their new Vice President of Merchandising and Procurement. John comes to the company with an extensive background in the natural channel and has worked with other key retailers in years past. With his addition, Market of Choice has begun implementing several new initiatives and programs. In the first quarter of 2017 they began enhancements to the new item process and assortment strategies, scheduled a new promotional planning process, and started looking at new ways to optimize their distribution center. Beginning in April, Market of Choice will report to SPINS. They are looking forward to working with brokers and suppliers to evaluate category trends, item and attribute opportunities, and distribution voids – which will lead into category management initiatives.

During the third quarter of 2017, Market of Choice will install a POS system, which will provide their team better information and more flexibility with pricing and promotions. This system will give sales managers a reporting engine to help identify opportunities for category and SKU performance. They have almost completed the roll-out of shelf management software which will help stores make data driven decisions as they optimize item placement.

Currently, Market of Choice has 10 operational stores with an 11<sup>th</sup> due to open in May at 1090 SE Belmont Street Portland, Oregon. Market of Choice is a local, family owned crossover retailer that has been in business since 1979. All stores are in Oregon: four in Portland, four in Eugene, and one each in Corvallis, Bend, and Ashland.

## Freshy's Opens New Organic Local Market in Mercer Island

Mercer Island has a new option for organic and local grocery at Freshy's Organic Local Market, located at street level of The Hadley, a new multi-use condo, retail and public space complex.

Freshy's Organic Local Market is one block south of Freshy's Seafood Market, both under the same ownership. Owner Bryce Caldwell originally opened the seafood market six years ago and due to its success decided to expand to the new location with options.



## Freshy's Opens New Organic Local Market in Mercer Island cont'd

While a large portion of the new store is designed around their local and sustainable seafood bar, the market also offers organic produce, dairy, grocery and convenience items. The 2,500 square foot store has a beachy seaside interior, with a stained floor and sand-colored trim. Lucky shoppers might get to meet the fisherman and crabbers as they hand deliver their fresh catches to the live cases and tanks.

Twenty-five percent of Freshy's sales go to a variety of charities, like Northwest Children's Fund, Good Wishes and Mercer Island Boys and Girls Club.



## WinCo Foods Opens Second Location in Nampa

WinCo Foods opened its second store in Nampa on March 2<sup>nd</sup>. It's located at 1175 N. Happy Valley Road, off Garrity Boulevard in the Nampa Gateway Shopping Center. The company decided to open the store in this location due to the frequent request of shoppers. In the last few years, the area around the Garrity interchange of I-84 has rapidly expanded with new retail and medical developments.

WinCo Foods also submitted zoning and design review applications to the City of Meridian for a new store off Eagle and I-84.

## Metropolitan Market Gets a New Buyer

Carrie Lin, the Northwest Whole Foods Market Grocery Buyer since June of 2012, has joined the team at Metropolitan Market. From Carrie, "Today is bittersweet as I resigned from my position as Regional Grocery Buyer at Whole Foods Market in the Pacific Northwest. Whole Foods Market has been a very long chapter in my life and I will miss the wonderful team members and supplier partners that I worked with, and the great initiatives towards better food offerings that we all worked so hard for. I am very excited to be joining the team at Metropolitan Market, a Seattle-based business with locations in Seattle and the surrounding area." Stay tuned for more information on the grand opening of Metropolitan Market in Sammamish!

## Chuck's Produce New Corporate Buyer

Chuck's Produce a two-store chain based in Vancouver, Washington, has a new corporate buyer Nick Soares. He is replacing Joan Schultz who is now working with UNFI in the Portland area. Nick has over 20 years' experience in grocery. Patrick Newman has also been promoted to Salmon Creek Assistant Store Manager which was the position Nick had prior.

Chuck's Produce offers free educational classes and events. They have an extraordinary produce department which takes about 25% of the store with a vast selection and other major departments such as an artisan bakery, meat, fish, cheese, bulk foods, coffee shop and full service deli. If you're in need of a caterer for a small or large event, Chuck's Produce is at your service. Both stores are filled with inventive food experts and accomplished chefs. If you have questions or to place an order, contact Mill Plain Catering at 360-597-2711 or Salmon Creek Catering 360-597-2175. For more information, please visit <http://chucksproduce.com/>.



## Blossom Grocery Celebrates 40 Years of Natural Foods in the San Juan Islands

Blossom Grocery on Lopez Island turns 40 this month! Originally founded by a local restaurateur in 1977 (that's right, 1977) it's the oldest natural foods grocery in the San Juan Islands. The founder wanted to give the island community easier access to healthy foods – so Blossom Grocery was born.

The store has changed owners twice and has been in several different locations around the island. Since 2004, it has been owned and operated by Brian and Jennell Kvistad, who have created the beautiful new location. After long days planning, building, and running the old store while setting up the new, Brian opened the 3,300 square foot building which – for the first time in the store's history – was specifically designed as a natural foods grocery store. This is something very special for the community; a larger space means more local organic foods, with a bright clean design and great people.

Lopez Island is the third largest island in the San Juan's in Washington State, nestled in the middle of San Juan, Orcas, and Decatur islands. After a beautiful ferry ride from Anacortes, you're in the heart of Northwest island life. There's certainly something special about Lopez Island and Blossom Grocery has been a part of it for decades. Congratulations Brian Kvistad and the entire Blossom Team. Here's to another 40 years!

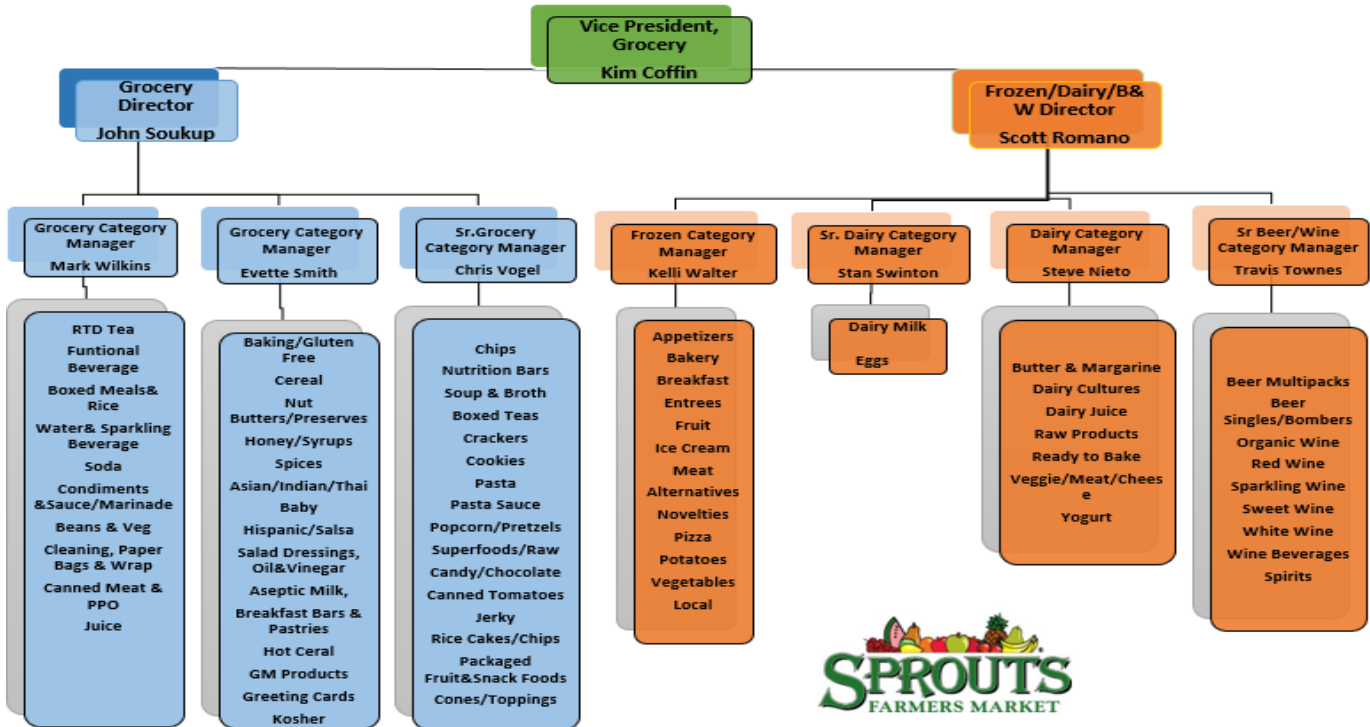
"We measure the quality of our products by their food miles, certified organic status, fair trade status, producer ethics, affordability, simplicity, freshness, and suitability for islanders' needs. We are locally owned, controlled, and committed." – The Blossom Grocery mission





Sunday, March 19<sup>th</sup>, Bloomberg reported Albertsons held preliminary talks with Sprouts Farmers Market to merge. It is reported that in mid-March, early stage discussions took place and a plan to take Sprouts private was included, but these talks are not guaranteed to lead to an agreement. If these discussions of merging were confirmed, Sprouts, a Phoenix-based company, would be added to Albertsons' portfolio, which includes many grocery stores, including the Lucky's Market and Safeway. We will see if these preliminary discussions lead to anything solid for these two grocery chains.

## Updated Sprouts Category Assignment Chart



For more information contact Presence Marketing/Dynamic Presence's Mary Dobos at [mdobos@pmidpi.com](mailto:mdobos@pmidpi.com) or Christen Heller at [cheller@pmidpi.com](mailto:cheller@pmidpi.com).

## New Sprouts Farmers Market in Prescott

At 6:45 A.M. on Wednesday, March 15<sup>th</sup>, Sprouts Farmers Market's ribbon cutting ceremony took place at their new store in Prescott, Arizona. This 30,000 square foot store is located at 174 E. Sheldon Street in the Depot Marketplace. In celebration of the grand opening, the first 200 shoppers received 20% off their entire purchase and there were many vendors conducting product demonstrations throughout the store. This Sprouts is expecting to have a decent number of shoppers coming to the store for lunch and dinner to enjoy their sushi bar, salad bar and all-natural deli.



## Sprouts Farmers Market submits building plan to the Town of Sahuarita

Building plans dated February 6<sup>th</sup> have officially been submitted to the Town of Sahuarita, located 15 miles south of Tucson, Arizona, for a new Sprouts Farmers Market. These plans place the new Sprouts at the new Crossing at Sahuarita shopping center. The proposed Sprouts will be 29,896 square feet. Sprouts still has not officially announced this new store, and typically they do not announce stores until six months before they open.

## Sprouts Farmers Market Announces Third Colorado Springs Store

Sprouts Farmers Market has officially announced they will be opening a store in the northeast side of Colorado Springs on Wednesday, May 31<sup>st</sup> of this year. This 30,000 square foot natural grocery location will be the third Sprouts in Colorado Springs and will be located at the southwest corner of Powers Boulevard and Barnes Road. This new Sprouts will be part of the newly developed shopping center, Powers Pointe. This retail location is offering more than 100 full and part-time job positions, from department managers to clerks.

## Colorado Springs' Whole Foods Market Closes Earlier than Expected

The Whole Foods Market located near Powers Boulevard and South Carefree Circle in the First & Main Town Center in Colorado Springs closed on March 7<sup>th</sup>. Whole Foods Market originally announced that this store, which first opened its doors in 2008 as a Wild Oats grocery, would be closing in the beginning of April. It is not known why this Whole Foods Market closed their doors a month early, but there is a second Whole Foods Market store located in Colorado Springs in the Chapel Hills East retail center on North Academy Boulevard that will remain open.



## Natural Grocers' South Jordan Store Opens

Natural Grocers opened its seventh Utah store on Wednesday, March 15<sup>th</sup>. This 15,000 square foot store is located at 10622 S. Redwood Road in South Jordan. The grand opening day was full of activities, including an ice cream social, and the first 150 people to shop there received a Natural Grocers t-shirt. The grand opening celebration continued into the weekend, where on Saturday, March 18<sup>th</sup>, the store hosted a "good4u Fair" from 12:00 P.M. to 4:00 P.M. Special guest, Dean Morris, one of the first herbalists in the United States to acquire full practicing privileges at a major hospital, presented a free community training during the "good4u" Fair. Dean Morris's training covered tips on supporting the immune system with herbs and probiotics.



## Natural Grocers by Vitamin Cottage Relocation in Boulder

The Natural Grocers by Vitamin Cottage located in Boulder, Colorado closed their doors at the 2355 30<sup>th</sup> street location on Tuesday, March 28<sup>th</sup> and reopened at 8 A.M. on Thursday, March 30<sup>th</sup>, just down the road, at 2685 Pearl Street. The grand re-opening of the Boulder Natural Grocers had a full day of celebration, which included a community ice cream social, as well as free samples and giveaways. The new space for the Boulder store features a community space and a demonstration kitchen, which will be offered to community members for various functions.



## Whole Foods Market Whole Cities Foundation Anchor Opened

**East**

On March 1<sup>st</sup>, Whole Foods Market opened the first Whole Cities Foundation store in Newark, New Jersey. The store is the Garden State's 17<sup>th</sup> and 40<sup>th</sup> in the region. Impressive at 29,000 square feet, that's not the only thing that makes this location stand out. Part of being involved with the Whole Cities Foundation is the commitment to providing the Newark area with healthy eating options at more affordable pricing. Many of the store's shelves are lined with brands that are supporting and partnering with the region on better everyday pricing.

According to a published statement by the company, "the Whole Cities Foundation, launched in February 2014, is the third independent nonprofit foundation established by Whole Foods Market. The mission of the foundation is to improve individual and community health through collaborative partnerships, education, and broader access to nutritious food in the communities they serve. As part of the approach to the Newark store, we have a community team that consists of two individuals with deep connections to the Newark community who are leading and guiding efforts to engage and connect with the specific needs of the residents of the city of Newark. The Whole Cities Foundation is providing fresh, healthy food access grants to local organizations, which we will be announcing at [the] opening."



## Whole Foods Market Whole Cities Foundation Anchor Opened cont'd

Staying true to local partnerships, area organizations were invited to apply for the fresh, healthy food access grant. The foundation will offer funding between \$5,000 and \$15,000 to each selected organization and hopes to support projects in all five wards of Newark. The new store is located at 633 Broad Street, Newark, New Jersey



## Whole Foods Market H Street Opens

Whole Foods Market recently added a jewel to their portfolio in the Mid-Atlantic Region with the opening of their newest store in the District of Columbia on March 15<sup>th</sup>. In the Northeast quadrant of Washington, D.C. along H Street now sits a 40,000 square foot Whole Foods Market with an upstairs pub and several specialty pop-up restaurants featuring local favorites. Additional highlights of the new location include a local gelato bar, artisanal hotdog station, and an open outdoor patio with plans which would expand the area into a garden in the summer months. Whole Foods Market currently has five locations in the nation's capital, including H Street, Foggy Bottom, P Street, Georgetown and Tenleytown. The Georgetown and Tenleytown locations are undergoing renovations and will reopen in the near future, per reports. The new H Street Whole Foods Market is located at 600 H Street, NE Washington, D.C.



## Whole Foods Market Augusta Shuttered

In February, after just three years' operating on Washington Road in Augusta, Georgia, Whole Foods Market closed its doors for the last time. Many determining factors played a role in the decision, but at the end of the day, the location didn't meet Whole Foods Market's expectations, sources say, citing profitability and competition. The natural/organic retailer isn't the only one pulling out of the market, as Kroger also closed a store in the area earlier this year. In the immediate area, shoppers will still have some options. Publix and Walmart currently have stores in Augusta, and European supermarket giant Lidl, is planning to open a store in the area later in 2017. The closest Whole Foods Market stores to the now defunct 41,000 square foot location are in Columbia, South Carolina, which is over an hour away from Augusta, and Atlanta, which is more than two hours from the closed store.

## Earthfare Ups Non-GMO Private Label

After two years of research and development, Asheville, North Carolina-based Earthfare, is set to pioneer a major expansion of their non-GMO private label offerings. Over the next several months, the 39-store chain will be adding around 200 GMO-free private label items to their already robust product lineup. According to President and CEO Frank Scorpiniti, the growing organic and natural retailer has worked diligently with non-GMO suppliers to reformulate products containing GMO's. The retailer's initiative works hand and hand with their new company branding- Live Long with Earthfare. The messaging was inspired by a recent Washington Post article about a National Institute of Health study highlighting that for the first time in 20 years' average life expectancy has declined. Earthfare currently has over 500 private label items. "From the onset, our merchant team has benchmarked every product against industry-leading products to ensure delicious, healthy food at an incredible value. Our shoppers asked for more non-GMO options, so we updated our entire Earthfare brand food line to meet their needs," Scorpiniti said.



## Safeway's Eastern Division Going Premium

Safeway's Eastern division is going high-end. With the recent expansion of gluten free, natural and organic items in conventional supermarkets continuing to grow, the Mid-Atlantic's Safeway division is following the trends and focusing on "premium" store sets. With two of these sets completed last month in their Severna Park and Westminster stores, both in Maryland, the banner has plans to continue these efforts in at least 30 outlets. The store renovations and updated offerings will help the 125-store chain with locations in Maryland, Virginia, Delaware, D.C., and Florida compete with growing competition from Whole Foods Market, Wegmans, Harris Teeter, The Fresh Market, and others gaining steam in the highly competitive market. The division is part of the Albertsons Companies, which also operates Acme and Shaw's on the East Coast.

## Demoulas Still Has Eyes for Maine

It has been nearly three years since Demoulas' Market Basket opened in Biddeford, Maine. At the time, the company spoke of their focus and commitment to growing their business in the Pine Tree State. There has been a lot of well documented dysfunction within the organization since those plans were originally discussed, and many insiders would assume that any major projects would be slowed given the turmoil, however, these challenges seem to have affected the New England region's northernmost state the most. Demoulas' Market Basket continues to add stores in Massachusetts and New Hampshire. The Tewksbury, Massachusetts-based company with over 75 locations has opened at least two new stores each year since the 2014 buyout involving CEO Artie T. Demoulas – none in Maine. The state with a lone store has been untouched ever since. Per recent reports, Demoulas' Market Basket continues to eye the state for future locations, but no further plans or details have been released at this time.

## Sprouts Folsom Now Open

Sprouts Folsom, located at 905 East Bidwell Street, opened its doors on March 15<sup>th</sup>. It occupies 30,326 square feet of 39,450 square foot space previously occupied by Orchard Supply Hardware. It is the first Sprouts store to open in Folsom, and Sacramento's sixth.

Customer Darina F. said, "Super excited when I drove by a few months ago to see that Sprouts would be coming to Folsom. Prior to this, I would drive out to Roseville on occasion to treat myself to Sprouts. Now that it's in our very own town, I don't have to drive so far. Conveniently located 10 minutes away from our home, I think we will be frequenting this location even more."



## Sprouts Opens in La Verne

West

La Verne, California welcomed a 30,000 square foot Sprouts to the area on March 22<sup>nd</sup>. Located in a suburb 30 miles East of Los Angeles in the Pomona Valley below the foothills of the San Gabriel Mountains. Natural product options have been limited to Nature's Way Health Food Center. This may be due to the town's relatively small size, at approximately 30,100.

Customer Morgan K. said, "LaVerne is so lucky to have Sprouts! This store is spacious and has such a great variety of goods. I recently ordered sandwiches from their deli and they were all delicious! The staff is super friendly and helpful. The layout of the store is great! I will be shopping almost exclusively at this grocery store from now on!"



## Grocery Headquarters Names Raley's 2017 Independent Retailer of the Year

Grocery Headquarters has named Raley's the 2017 Independent Retailer of the Year award! This is an exceptional honor, given the increasingly competitive retailer environment, and consequently, the challenges to stand out among the retail crowd. The award was given in recognition of Raley's history of innovation, focus on key categories, dedicated employees, excellent customer service, and its clean, easy to shop stores. Interestingly, Raley's road to its current success has been a rocky one.

Founded 82 years ago by Thomas P. Raley in Sacramento, one of the world's richest agricultural hubs, it evolved into a market leader. It created the first self-service meat counter in 1947, and moved to a superstore concept in the early 1970s - removing many walls and merging the food and nonfood sides of the business. In 1973, they acquired the Eagle Thrifty chain in Nevada, then purchased the Bel Air banner in 1992, and the Nob Hill foods banner six years later. In the year 2000, they introduced the everyday value pricing model, but soon fell back to the hi-lo model (charging a high price for an item and later when the item's popularity has passed, selling it to customers by giving discounts or through clearance sales). This created too high of a price point for even affluent Northern Californians, shaking Raley's core customer base. However, it was the Great Recession 2008 that brought the chain to its knees. Once loyal customers abandoned its aisles for less expensive alternatives. In the face of this loss, Raley's was forced to once again reevaluate its business model.



## Grocery Headquarters Names Raley's 2017 Independent Retailer of the Year cont'd

First, they went on chain-wide campaign to motivate their approximately 11,000 team members, and brought back a family atmosphere. Next, it redefined its relationship with its suppliers, acting as a liaison between its customers and their vendors, to better communication customer expectations. They also tailored each of their stores' merchandising approach to best serve their respective customer demographics. These moves helped to reestablish Raley's as the gold standard bearer for grocery retailing in its area. Now, they are planning to introduce its Market 5-ONE-5 neighborhood store concept with an 11,000 square foot unit in Sacramento this spring.

Congratulations to Raley's on not only expertly navigating the challenges of the food industry's changing retail landscape, but also positioning itself well for future growth!

## Smart & Final Reports Losses in Q4

Smart & Final Stores reported a loss of \$300,000 in Q4, due to cannibalization from new-store openings and deflation in several major categories. There was also a 2% comparable-store sales decline, which included a 2.2% decrease in transaction size and a 0.2% increase in transaction count. This is in stark contrast to one year ago, which had a net income of \$10 million for the same period. This is not altogether unsurprising, considering 2016 was a big year for the chain. They opened a record 33 new stores, mainly from the conversion of supermarkets it had acquired from Haagen, finishing the year was 305 stores.



In spite of the loss in Q4, President and CEO Dave Hirz remains optimistic. Deflation is not as widespread as it was in 2016, and is expected to abate in mid-2017. "I know the cannibalization was painful this year, but we still think it's a good tradeoff," said Hirz. "When you can double your store presence in a critical area like San Diego from 13 to 27 stores, and the type of density we now have in [Los Angeles] and the Central Coast, it is really working well for us. It's helping with our messaging, our branding, our marketing... We think cannibalization in Smart & Final will return to a more normalized 50 [basis] point-a-year level."

The company also projected sales growth for 2017 of between 5.5% and 6.5%, with comp-store sales up 1% to 2%.

Also noteworthy is that Smart & Final's Sun Harvest natural and organic private label saw a 57% increase in Q4 sales. This is due largely to the fact most of the innovation in 2016 went to Sun Harvest and their other private label, First Street.

## New Leaf Pleasanton Closing

In order to focus resources on long term sustainable growth, New Seasons has closed their New Leaf Community Markets store in Pleasanton. Anchoring the Vintage Hills Shopping Center at the corner of Bernal and Vineyard avenues, the Santa Cruz based grocer (which was owned by New Seasons Market based out of Portland) first moved to Pleasanton in May of 2013, opening in a former Romley's supermarket space that had been vacant for almost 15 years.



Pleasanton City Manager Nelson Fialho stated, "The news is unfortunate in light of the progress made over the years with facade improvements and decreased vacancies. I recall the days when the center was mostly shuttered. The city will do what it can to work with the property owner to find a suitable replacement."

Customer Donna S. was one of many who voiced her grievances, "I am saddened to see this store leaving. Not only a healthy alternative to the other 'grocery' markets, but a comfortable and friendly place to shop for the best foods available. I will miss it! No ability to access the other stores in the general area is going to be a problem."

New Leaf has planned to do their very best to transfer store employees to one of their other locations – all of which are outside the East Bay – along with providing transitional services. They also worked with local organizations to minimize food waste resulting from the closure.

## Nugget Markets Makes Fortune's List of "100 Best Companies to Work For"

For the 12<sup>th</sup> year in a row, Nugget Markets has been listed as one of Fortune Magazine's "100 Best Companies to Work For." It came in at #30, and has consistently been in the top 37 companies each year it has made the list. The chain is best known for its quality and service, both in the community and in-store. "Our associates make all the difference," said CEO and President, Eric Stille. "At Nugget Markets, it's not just a job. Our environment is like a family that has fun, and we all come together to create something very special."

Additionally, Nugget provides its employees generous benefits, including a 4% 401K match, zero health premiums for both full and part-time associates, and has never had a layoff in the course of its 90 years in business.

"Family owned and operated since 1926, Nugget Markets is a full-line grocery store in Northern California that provides high-quality perishables and organics, chef-prepared foods, specialty grocery items and conventional goods in a European marketplace setting. The Nugget Market, Inc. family of stores includes 12 Nugget Markets in Northern California, Fork Lift by Nugget Markets in Cameron Park, Food 4 Less Woodland and their most recent additions, Sonoma Market and Glen Ellen Village Market in the Sonoma Valley."



## Fair Trade Certified Products Rapidly Gaining More Recognition

Oakland, California-based Fair Trade USA (FSU), the leading third-party certifier of fair trade products sold in North America, teamed up with global health and sustainability consulting and research firm Natural Marketing Institute (NMI) to research consumer awareness of the Fair Trade Certified label. Their findings show a dramatic upward trend.

There were 963 new Fair Trade Certified CPG product launches in 2016, up 221% more than 2013's 300 launches, and 75% more than 2015's 500. Consumer recognition of FSU's Fair Trade Certified label was at 67% in 2016, up 8% from 2015, and 12% from 2013. Millennials showed the most recognition, at 73% in 2016, up 65% from 2015, with 53% more likely to purchase Fair Trade Certified products.

## Lucky's Market Opens 25<sup>th</sup> Store in Traverse City

## Midwest

Lucky's Market opened their 25<sup>th</sup> location at 3587 Marketplace in Traverse City, Michigan, on March 22<sup>nd</sup>. This will be their second store in Michigan with plans to open more stores throughout the Midwest. The Lucky's chain originated in Boulder. They currently have stores in Florida, Colorado, Georgia, Indiana, Iowa, Kentucky, Missouri, Montana, Ohio, Wyoming, Kentucky, and Michigan.

The Lucky's store in Traverse City is approximately 30,000 square feet. The chain specializes in locally grown fruits and vegetables to support the surrounding community. The stores will have wall to wall grocery, dairy, meats, seafood, bakery, bulk, apothecary, hot bar, local beers, wines, and spirits. They are passionate about bringing the best quality products to the community. They target more of a natural and specialty type of shopper who is looking for healthy food for their family and created an atmosphere that will help an entire generation eat healthier foods.

Traverse City was founded in 1839 and is on the shores of Lake Michigan. It is known for their annual National Cherry Festival which brings in over 500,000 people for that week alone. The metropolitan population is approximately 143,372. Traverse City is the largest producer of tart cherries in the United States. The surrounding country side of Traverse City also produces grapes and is one of the centers of wine production in the Midwest. Tourism in summer and winter is another key industry. The area features varied natural attractions, vineyards, fresh water beaches, skiing, and forests.



## Whole Foods Market Opens 75,000 Square Foot Store in Chicago

Whole Foods Market Lakeview's newly relocated store recently opened its doors on Wednesday March 22<sup>nd</sup>. The original Lakeview location a few blocks away opened its doors February 14<sup>th</sup>, 1996 and was the second Chicago and third Chicagoland location for Whole Foods Market. Lakeview is now the flag ship store for the Chicagoland area and has grown from 31,500 to 75,000 square feet. This new location is a three-story floor plan, having a full glass front to the store to let in lots of natural light. Other amenities include improved parking, coffee bar on the ground level, large bright shopping area on the top floor, and an enclosed bar to give the feeling of a restaurant/bar within the store. The new Lakeview Whole Foods Market is located at 3201 N Ashland Avenue in Chicago, Illinois.



## Whole Foods Market “South” Closes in Evanston

On March 19<sup>th</sup>, Whole Foods Market closed its Evanston South location. The location had a 20 year lease that expired. The store was one of three Whole Foods Market locations within three miles of each other in Evanston, Illinois. The location site had previously been a car dealership and “The Peoples Market”. When Whole Foods Market purchased Wild Oats, they converted the location. The existing building was dated and competition (Trader Joes, Mariono’s) opened in the surrounding area which helped Whole Foods Market executives make their decision to close the location. The employees of the Evanston South location were offered positions in the surrounding Whole Foods Market stores in the area.

Whole Foods Market personnel feel confident that they can continue to service the Evanston area with their two remaining stores located to the North. The Green Bay Road location opened less than two years ago and offers consumers a wide range of products and services. The original Evanston location, located on Church Street, provides similar amenities out of a smaller facility.



## Fresh Thyme Blooms in Hoosier Country

On Thursday, March 9<sup>th</sup>, over 450 people lined up as Fresh Thyme Farmers Market opened its 11<sup>th</sup> Indiana store in Bloomington. The Bloomington store is located at 3600 W. 3<sup>rd</sup> Street.

Bloomington is the seventh largest city in Indiana, situated in the Southern region of Indiana, and has a population estimated at approximately 82,500. Established in 1818 by a group of settlers who were so impressed by the abundance of “Blooms” they named the city Bloomington. Bloomington is the home of Indiana University-Bloomington and 10 other schools and universities.

At the grand opening, there was a hot dog cart where 100% of the proceeds went to the Boys and Girls Club of Bloomington. The first 250 customers received a free bag of groceries.

The new store has approximately 28,000 square feet of space and offer shoppers an incredible selection of fresh vegetables and fruit and food that are locally sourced whenever possible. The store stocks over 300 private label items. The bulk department is a highlight featuring over 400 bins. With 384 linear feet of dry grocery aisle space and eight end caps this Bloomington store has a fabulous center-store grocery area. Throughout the store there is a large selection of gluten-free and dairy-free products. Many ethnic and world cuisine offerings can be found in the aisles as well. Twenty freezer doors feature natural and organic items including fruit and vegetables, meat alternatives, entrees, pizza, breakfast, bread, ice cream and other products. There is a three-door frozen section dedicated to gluten free items. Unique to the Bloomington store is a huge 36’ two-sided frozen bunker at the rear of the store. At the front end of the store is an impressive eight-door grab-n-go cooler of various chilled beverages. The perishable-dairy area boasts 32 refrigerated doors throughout the store featuring organic, natural as well as a few conventional items. Cold-pressed juices, fresh squeezed options are available. Specialty ensures a large selection of cheese to complete the package. Customers can acquire all their supplement and beauty needs here too, with over 7,000 supplements and body care items and educational materials as well.



## Giant Eagle Opens 75,000 Square Foot Location in Erie

On March 23<sup>rd</sup>, Giant Eagle opened its new 75,000 square foot store for the residents of Erie, Pennsylvania. This new store replaces the two other Giant Eagle stores at West 26<sup>th</sup> Street and Peninsula Drive in Millcreek. The West 26<sup>th</sup> store closed on March 11<sup>th</sup> and Millcreek closed on March 22<sup>nd</sup>. Employees at those stores were offered positions at the new location, which staffs 180 employees. The store will also have curbside express, new to the area and customers will be able to go to [www.gianteagle.com/curbside](http://www.gianteagle.com/curbside) and order their groceries online and pick it up at the store. The cost is \$4.95

## Ruby's Market Opens in Springfield

Ruby's Market celebrated its grand opening on March 15<sup>th</sup>. Located at 2843 E. Sunshine in Springfield, Missouri, Ruby's Market is a health based store that promises “Good Food for All” with a variety of organic and natural grocery items at affordable prices. The store's unique features include a large produce selection with a “Chop Shop” where customers can have produce cut fresh and ready to eat. In addition, the store features brick-oven pizza, hot food bar, tap room, juice bar, butcher, fresh flown-in seafood and much more.



## Ruby's Market Opens in Springfield cont'd

Pyramid Food's Vice President of Sales Rob Marsh says, "I'm confident the people of Springfield and surrounding communities will be very pleased come March 15<sup>th</sup>."

Pyramid Food's is an employee-owned and Springfield based company, operating 51 grocery stores throughout Missouri and Oklahoma.



## Meijer To Spend \$375M On New Stores, Remodels In 2017

Meijer announced plans in early March to invest more than \$375 million on new and remodeled stores in 2017 across six states. The investment will include seven new stores and remodeling of 22 stores. The new stores will be built in Michigan, Indiana and Wisconsin. The new locations are expected to create about 2,100 new jobs. This year, Meijer will finally open stores in Michigan's Upper Peninsula. The two stores – the only new locations in Michigan in 2017 – will be in Escanaba and Sault Ste. Marie. Two stores are planned for Indiana in the communities of McCordsville and Franklin. Three stores opening this year in Wisconsin, Meijer's newest market, in Greenfield, West Bend and the Green Bay suburb of Howard. By the end of the year Meijer will have 237 stores. The 22 remodels include six projects in Michigan, with major overhauls planned for stores in Mt. Pleasant, Commerce Township and Algoma Township. The capital investment is less than last year when Meijer spent \$400 million on nine new Meijer supercenters and 32 different remodel projects.

## KeHE to Debut Atlanta Distribution Center in April

### Distributor News

KeHE Distributors will debut its newest distribution center on April 12<sup>th</sup> in Douglasville, Georgia, near Atlanta. The 450,000 square foot LEED-certified facility is located at 1851 Riverside Parkway. It enhances the company's network of distribution centers supporting more than 30,000 stores across North America, according to KeHE.

The grand opening festivities next month begin at 10:00 A.M. and will feature a ribbon-cutting ceremony, guided tours, light snacks and refreshments, a Pick & Pack event to benefit Children's Hunger Fund and samples courtesy of the event's sponsors.

Employee-owned KeHE, headquartered in Illinois, is a natural foods distributor with 17 distribution centers in the U.S. and Canada.

## UNFI Successful Conversion of Haddon House Distribution Center

The second Haddon House Distribution Center, located in Howell, New Jersey, was successfully converted to the UNFI distribution network the weekend of March 11<sup>th</sup>. This is a major milestone in the integration and will enable UNFI to serve their customers as one company.

## Gourmet Guru Integration

UNFI is in the process of relocating items from the Gourmet Guru Bronx facility to the UNFI Distribution Centers. Items are being relocated based on geographic proximity, customer-specific long hauls, and existing business.

## 2017 UGMC Sell-Abration – California Show Recap

Thank you to the Presence Marketing/Dynamic Presence team and vendors that attended this year's UGMC California Sell-Abration Show in Ontario, California! UGMC held their show on March 1<sup>st</sup> and 2<sup>nd</sup>, where they welcomed exhibitors, retailers, and brokers to the Ontario Convention Center.

The next 2017 UGMC Expo Show will take place August 9<sup>th</sup> and 10<sup>th</sup> in Long Beach, California. More information on future shows will be sent out once it becomes available. If you have any questions, please feel free to reach out to the Presence Marketing/Dynamic Presence's Alana Engler at [aengler@pmidpi.com](mailto:aengler@pmidpi.com).

**Unified**  
**Sell-abration**  
**CALIFORNIA**

## Trend Insights – Sports Nutrition

### Data Update

Sports nutrition is the study and practice of nutrition and diet as it relates to athletic performance. Sports nutrition products are any food, drink, or supplement that is intended to improve strength, stamina, or performance in general. These include but are not limited to: pre-workout products to increase energy and focus before athletic activity, intra-workout products that prolong endurance by hydrating and replenishing you during activity, and post-workout products that help you recover from the workout or sporting activity. Sports nutrition has broadened to include all walks of active lifestyles from professional athletes to weekend warriors.

## Trend Insights – Sports Nutrition cont'd

Which Categories contribute to Sports Nutrition?



PERFORMANCE NUTRITION



SHELF STABLE WELLNESS  
BARS & GELS

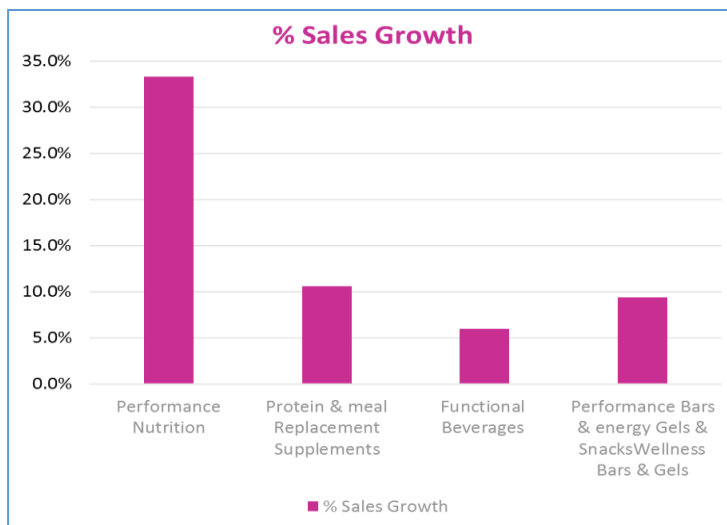
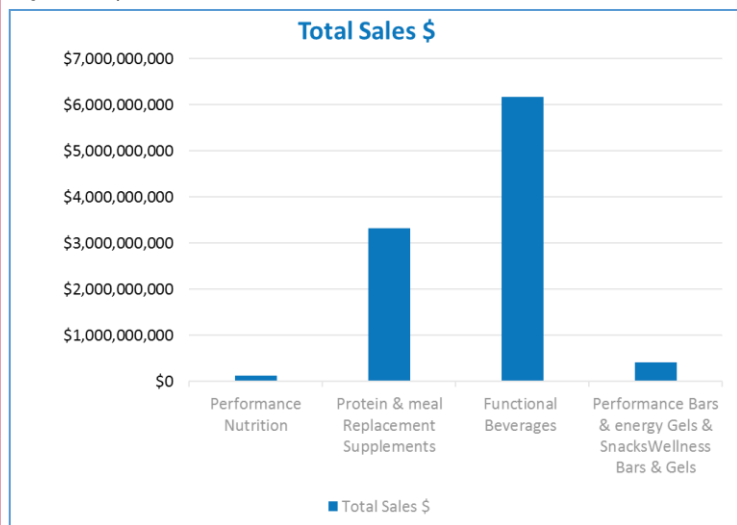


PROTEIN SUPPLEMENTS &  
MEAL REPLACEMENTS



SHELF STABLE  
FUNCTIONAL BEVERAGES

Within the SPINS Product Library, we track sports nutrition items within four relevant categories: performance nutrition, shelf stable wellness bars and gels, protein supplements and meal replacements, and shelf stable functional beverages. With our new Life Focus attribute in development, we'll soon be able to pinpoint areas of growth within sports-centric products by each product's intended use: pre-workout, intra-workout, post-workout, and general sports nutrition.



On the graph on the left side, we can look at the total sales of each category that contains sports nutrition food, beverages, or supplements. The total category is growing at a modest 6%. This appears to show that the category is already developed and matured. When we look at the growth rate graph on the right side, it shows that performance supplements are currently the smallest category, but there is a lot of room to develop and grow as evidenced by the 33% growth rate. Protein already has a large market share but continues to grow at a double-digit rate. We see protein claims trending across many food and beverage categories. Just a few examples are waters, pastas, and juices fortified with either plant or animal proteins. We believe that protein continues to trend because negative perceptions on fat and carbohydrates still exist. Protein is the default macronutrient to garner attention from consumers with label claims. It has been supported by research on its ability to reduce hunger, improve satiety, and support muscle growth and healthy body composition. You can learn more about more sports nutrition by clicking the link to our recent webinar: [SPINS Sports Nutrition Presentation](#).

### Attribute Ticker

SPINS' extensive attribution provides the unique ability to distinguish and understand natural, specialty, and conventional product performance in every retail channel. Every product with a barcode is coded for an expansive list attributes, allowing for trillions of nuanced trend insights.

Total US – Natural Channel Dollars vs. YAGO

Total US – Conventional Channel Dollars vs. YAGO





## Attribute Ticker cont'd

### Attributes Driving Channel Growth in 2017

- Labeled Organic products continue to show favorable growth in both channels.
- Certified Non-GMO Project Verified products show favorable growth in both channels.
- Certified GFCO gluten free products show declines in both channels.
- Certified Fair Trade USA products show double-digit growth in both channels.
- Labeled Vegan products continue to show double-digit growth in the Conventional Channel.
- Labeled Paleo product growth continues to demonstrate strong sales in both channels.



## Data Ticker

SPINS' extensive attribution provides the unique ability to distinguish and understand natural, specialty, and conventional product performance in every retail channel. Every product with a barcode is coded for an expansive list attributes, allowing for trillions of nuanced trend insights.

NATURAL FOOD SUPERMARKETS			
PRODUCT GROUP		52 WEEK DOLLARS	% vs YA
% of Total	TOTAL CHANNEL	\$ 8,142,074,360	6.4%
35.2%	GROCERY	\$ 2,868,089,229	4.8%
17.3%	REFRIGERATED	\$ 1,412,217,388	7.9%
13.2%	VITAMINS & SUPPLEMENTS	\$ 1,073,744,443	6.7%
8.9%	FROZEN	\$ 726,524,354	6.1%
6.3%	PRODUCE - PACKAGED	\$ 509,655,976	13.6%
6.1%	BODY CARE	\$ 494,833,401	7.1%
4.7%	ALCOHOL	\$ 383,788,312	6.0%
4.0%	HERBS & HOMEOPATHIC	\$ 327,879,829	9.2%
2.5%	GENERAL MERCHANDISE	\$ 203,175,933	4.2%
1.7%	OTHER	\$ 134,732,200	-2.6%
0.1%	(OTC) MEDICINES	\$ 7,433,294	6.4%

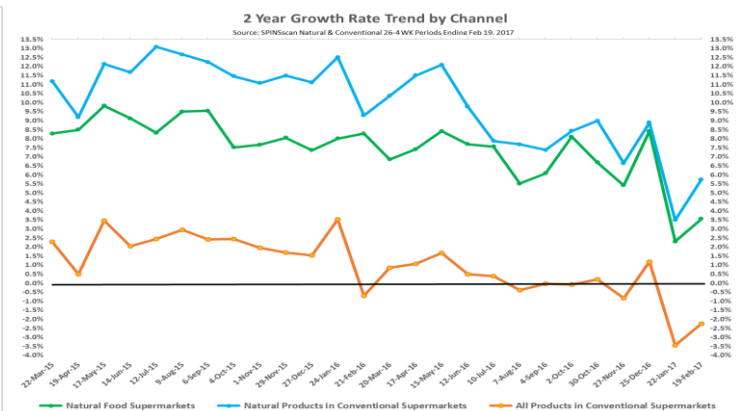
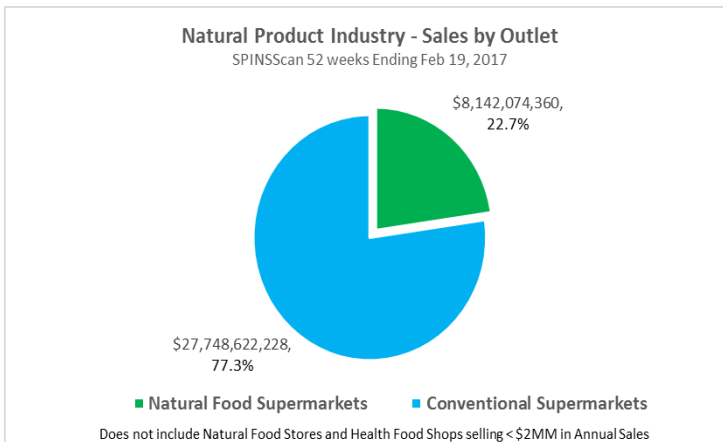
SPINSScan Natural period ending Feb 19, 2017

NATURAL PRODUCTS in CONVENTIONAL GROCERY			
PRODUCT GROUP		52 WEEK DOLLARS	% vs YA
% of Total	TOTAL CHANNEL	\$ 27,748,622,228	8.3%
40.8%	GROCERY	\$ 11,311,535,652	9.9%
28.3%	REFRIGERATED	\$ 7,844,171,176	5.2%
12.3%	FROZEN	\$ 3,406,714,320	9.7%
7.9%	PRODUCE - PACKAGED	\$ 2,199,677,174	7.6%
4.1%	GENERAL MERCHANDISE	\$ 1,133,488,007	10.2%
3.5%	VITAMINS & SUPPLEMENTS	\$ 965,240,079	8.2%
1.6%	BODY CARE	\$ 431,149,998	16.0%
0.9%	ALCOHOL	\$ 240,589,179	3.3%
0.8%	HERBS & HOMEOPATHIC	\$ 214,008,219	8.1%
0.0%	(OTC) MEDICINES	\$ 2,048,423	30.9%

SPINSScan Natural period ending Feb 19, 2017

ALL PRODUCTS in CONVENTIONAL GROCERY			
PRODUCT GROUP		52 WEEK DOLLARS	% vs YA
% of Total	TOTAL CHANNEL	\$ 316,243,787,965	-0.1%
43.1%	GROCERY	\$ 136,435,112,596	0.1%
15.9%	REFRIGERATED	\$ 50,130,778,738	-2.8%
15.0%	FROZEN	\$ 47,560,374,659	-1.3%
8.5%	GENERAL MERCHANDISE	\$ 27,020,371,803	0.2%
6.9%	ALCOHOL	\$ 21,821,038,767	2.7%
5.5%	PRODUCE - PACKAGED	\$ 17,462,918,427	3.0%
2.5%	BODY CARE	\$ 7,749,451,725	1.0%
1.6%	(OTC) MEDICINES	\$ 5,078,633,030	3.1%
0.9%	VITAMINS & SUPPLEMENTS	\$ 2,710,904,985	4.2%
0.1%	HERBS & HOMEOPATHIC	\$ 274,203,236	9.2%

SPINSScan Natural period ending Feb 19, 2017



Period 2 ending February 19<sup>th</sup>, 2017, reflects a favorable sales rebound. Consumer demand for natural products and a healthier lifestyle drove positive growth across natural and conventional channels in 2016. 2017 started with a sales dip right after a sales spike that closed out 2016. There is always a spike and dip during the holidays. Combine this with news of deflation and store performance this holiday season, and you can see the reasons why this spike/dip stood out a bit more than years past.

## About SPINS

SPINS is a passionate advocate of brands and retailers that promote healthy living. As the leading provider of retail consumer insights, analytics reporting, and consulting services for the Natural, Organic, and Specialty Products Industry, its business offerings are helping retailers in this high growth area to connect people with the brands that they need and love. Learn more by visiting our new website at [www.spins.com](http://www.spins.com).

## Looking for more Information or Training?

Please register for SATORI training by clicking [trainings](#), step-by-step [tutorials](#), and [Tips and Tricks](#) webinars.

## Expo West: “Our Industry Can and Must Respond to Climate Change” – By Steven Hoffman, Compass Natural Marketing

## Climate Collaborative

“There is enormous agreement – 70% of Americans think climate change is real, and 61% surveyed are very concerned. Why, then, aren’t we in the natural products industry doing more for climate change?” asked Nancy Hirshberg, Co-founder of the Climate Collaborative.

Turns out, Climate Change was a primary topic of discussion in meetings, seminars, keynote addresses – and full day sessions – at Natural Products Expo West, held March 8-12, 2017, in Anaheim, California. Expo West is the world’s largest natural and organic products trade exposition, drawing more than 80,000 visitors from over 70 countries.

Attendees were drawn early to this year’s event for [Climate Day](#) on March 8<sup>th</sup>, co-hosted by the newly launched [Climate Collaborative](#) and New Hope Network, producer of Natural Products Expo West. The full-day event featured Paul Hawken, Co-founder of Project Drawdown, Rose Marcario, CEO of Patagonia, Timothy LaSalle of California State University and others, plus a screening of [Kiss the Ground](#)’s new documentary on regenerative food and agriculture.

On Friday, March 10<sup>th</sup>, in an event hosted by Presence Marketing/Dynamic Presence, a number of industry experts interacted with retail members and leadership of National Co+op Grocers (NCG) about Climate Change, including Kevin Cleary, CEO of Clif Bar, Greg Steltenpohl, CEO of Califia Farms, John Foraker, CEO of Annie’s, and Nancy Hirshberg, Co-founder of the Climate Collaborative. The panel was moderated by Heidi Traore of National Co+op Grocers and produced by Milton Zimmerman of Presence Marketing/Dynamic Presence.

“In a survey of members, we knew climate change was a problem, but didn’t know what to do about it, said Robynn Shrader, CEO of National Co+op Grocers in an introduction to the panel. “We also knew it was primarily up to the private sector to solve this problem without much support from federal, state or local governments. It’s time for National Co+op Grocers to be focused, and supporting the Climate Collaborative and celebrating climate leadership now makes it to the top of NCG’s agenda.”

Highlights from the panel:

### Nancy Hirshberg, Climate Collaborative

“Climate Change is here now, it is real, and it is human caused. We are living through an incredible transition in moving from a fossil fueled economy to a regenerative economy. There are nine areas where companies can make a change, as outlined on the Climate Collaborative’s [website](#). The Collaborative helps business leaders see the value that making climate impact part of your purchasing criteria, etc., is ultimately good for business. Very often, there’s not just support from senior management for taking action on climate change, in fact, it has to be modeled from the top. What retailers can do is make a commitment to public action and engage vendors and suppliers. Celebrate vendors and brands doing the right thing. How can we constructively engage consumers? Retailers have power. Our industry can and must respond to climate change.”

### Kevin Cleary, Clif Bar

“Unlike many companies driven by just one bottom line, Clif Bar is guided by [five aspirations](#), including sustaining our business, our brands, our people, our communities and the planet. We have to think about all five values. Being values based has a tremendous impact on the people you draw to your organization and the ‘stickiness’ of them staying and staying connected to the things that matter. We try to drive impact by working through the supply chain and in getting suppliers to think about energy as an ingredient. Our ‘50:50 by 2020’ goal is to have 50 suppliers getting 50% of their energy from renewables by 2020. We host supplier summits and provide free consulting to get our suppliers on board with what we are thinking about. We strive to understand our carbon footprint, we support wind turbine energy, and we went organic with our flagship products. We gave loans to employees to buy hybrid or electric cars, and 240 employees too advantage! If there ever was a time for business to lead, it is right now.”

### John Foraker, Annie’s

“For Annie’s, it’s been all about organic; we launched our first organic product in 1998 and moved all our wheat to organic. Our reasons include concern over climate. There is strong correlation between healthy organic soils and climate change. We are trying to drive conversion to more organic acres. What some are calling ‘Organic 3.0’ – the real move toward carbon sequestration in the soil and regenerative food and agriculture. We want to drive impact in conventional agriculture, too, including more adoption of cover crops, crop rotation and the relationship between soil, climate and our future. We are working with our supply chain on farming, manufacturing, packaging and other primary inputs. General Mills is focusing on land, air, water and bees, reducing GHGs, focusing on eight key watersheds and promoting pollinator habitat. Companies like us need to lead, but we need to work with our partners and their tools to help solve the problems, too. Also, as an early adopter of social media, we like to engage our consumers in the things we are doing. We’re not perfect but we share our journey; it helps embed consumers in the brand and the mission.”

### Greg Steltenpohl, Califia Farms

“Our largest shareholder group is farmers. So goes California, so goes our company. Our farmer group works 40,000 acres in the Central Valley. We are a cultural emissary between the conservative farming community and the natural and healthy lifestyles community, and we need to help create narratives that resonate across demographics, culture and generations. Califia was inspired by the Spanish legend of Queen Califia, who ruled the bountiful, mythical island of California in harmony with nature and reflecting the power of culture. We are pursuing five key areas where we’ve made commitments with the Climate Collaborative, and we decided to be plant based, as we feel switching to a more plant based diet has significant impact on one’s personal carbon footprint. The challenge for tackling these things within an organization is not making it so hard that it’s overwhelming. Pick big audacious goals, yes, but also what your organization can handle along the journey. Our biggest challenge is water. Wastewater in a processing plant is an issue. However, for the first time, we are now closed loop on treating wastewater; in fact, we are net positive on wastewater: water comes out better than when it came in! It was painful at first, but now we are operating at a much lower cost on water. We’ve also been successful in eliminating solid waste - from 50% to 7% solid waste in two years. How can retailers help? National Co+op Grocers epitomizes a relationship with the consumer, tying to local communities and supporting climate initiatives that are citizen driven, for example, Bee Friendly citizen-led initiatives. The natural foods movement is becoming ‘The Food Industry.’ Conventional producers don’t have anywhere near the engine. We can exert our influence and the economic power of a lifetime consumer. By being true to their core values, you are establishing that economic continuity. Consumer loyalty is shifting alignment to businesses with core values. The climate issue can be the link to our consumers.”





## National Co+op Grocers Climate Collaborative Awards to Recognize Exemplary Industry Leadership on Climate Change

### National Co+op Grocers Climate Collaborative Awards to Recognize Exemplary Industry Leadership on Climate Change

At the first-ever [Climate Day](#) event held on March 8<sup>th</sup>, 2017, at Natural Products Expo West in Anaheim, California, National Co+op Grocers (NCG) joined with the [Climate Collaborative](#) to announce a new recognition for natural foods companies who demonstrate exemplary leadership on climate change.

The “National Co+op Grocers Climate Collaborative Awards” will be awarded for the first time in 2018 to manufacturers, distributors, brokers, suppliers and/or service providers within the natural channel that:

- Make a minimum of [three commitments](#) with the Climate Collaborative; and,
- Demonstrate meaningful climate action and excellence in one or more commitment areas by expanding the boundaries of what has been done previously in the industry.

Awards will be given to companies in three categories: emerging (under \$10M in revenue), mid-sized (\$10M-\$100M) and large (over \$100M).

Officially launched with Climate Day, Climate Collaborative is a new initiative within the natural products industry bringing concerned companies together to take bold, meaningful action to reverse climate change. NCG is a major sponsor of the Climate Collaborative and has recently adopted climate change as a priority area for the advocacy work NCG does on behalf of its 148 food co-op members. The organization has made Climate Collaborative commitments in the areas of policy, agriculture and food waste.

Senior leadership from many of the industry’s leading brands spoke at Climate Day including Nature’s Path, Annie’s, Organic Valley, Patagonia Provisions, Stonyfield Farm, Honest Tea, Nutiva, and Guayaki, among many others. NCG CEO Robynn Shrader and Sustainability Manager Sheila Ongie also spoke at the event. Environmentalist Paul Hawken from Project Drawdown delivered an inspiring and informative keynote unveiling the latest research on the top 100 real world climate change solutions, nearly all of which the natural products industry is well positioned to address. Project Drawdown’s new [book](#), *Drawdown: The Most Comprehensive Plan Ever Proposed to Reverse Global Warming*, Edited by Paul Hawken, is due out on April 18<sup>th</sup>.

For more info on the NCG Climate Collaborative Awards, contact Jill Kadrlík, National Co+op Grocers, [jill.kadrlík@ncg.coop](mailto:jill.kadrlík@ncg.coop).



Steven Hoffman is Managing Director of [Compass Natural](#), providing brand marketing, PR, social media, and strategic business development services to natural, organic and sustainable products businesses. Contact [steve@compassnatural.com](mailto:steve@compassnatural.com)



### Expo West 2017 Show Recap

## Expo West

Natural Products Expo West, the West Coast’s largest natural, organic and healthy products event, took place March 9<sup>th</sup> to 12<sup>th</sup>, at the Anaheim Convention Center in California. This event had record setting attendance reaching over 77,000 industry attendees and 3,080 exhibitors. Presence Marketing/Dynamic Presence was proudly represented by nearly 250 brands and about 130 employees. The 36<sup>th</sup> annual Natural Products Expo West was very successful and our employees had many opportunities to conduct meetings in our meeting rooms and at the Exhibitors Booths on the show floor.

Many companies were recognized this year with awards, and the 2017 Best of West Winners included some from Presence Marketing/Dynamic Presence!

- 2017 Best New Snack: Farmhouse Culture for their Kraut Krisps  
2017 Best New Sweet or Dessert: Hail Merry for their 2-Count Cups  
2017 Best New Organic Food: Farmhouse Culture with their Fermented Veggies  
2017 Best New Special Diet Food: Good Karma Foods for their Dairy Free Yogurt  
2017 Best New Beverage: Bonafide Provisions for their Drinkable Veggies  
2017 Best New Meat Alternative: Sweet Earth Natural Foods for their Mediterranean Veggie Burger  
2017 Editors’ Choice, Food: Lundberg Family Farms

Region	Award Winner	Brand	Award
MW	John Schmidt	Boulder Canyon	Broker of the Year
NW	Kelly Vilar	Late July	Sales Representative of the Year



For news, trends and coverage of the Natural Products Expos and the natural, organic and healthy living industry visit [www.newhope360.com](http://www.newhope360.com). The Natural Products Expo East 2017 is set to again take place at the Baltimore Convention Center, September 13<sup>th</sup> to 16<sup>th</sup>, 2017. Expo West 2018 will return to the Anaheim Convention Center and will take place March 8<sup>th</sup> to 11<sup>th</sup>, 2018. For more information regarding these upcoming expos, please visit their website at [www.naturalproductsexpo.com](http://www.naturalproductsexpo.com) or reach out to Presence Marketing/Dynamic Presence’s Laurie Winter at [lwinter@pmidpi.com](mailto:lwinter@pmidpi.com).

## Threshold: A History of Giving Continues

## One Love One Earth

Through the years, Threshold has continued giving back to the larger community often partnering with organizations supporting environmental and social programs. For example, Threshold supports the organization "One Love One Earth" which focuses on helping children and families in need by providing provisions like school supplies, and nutritional support including food and dietary supplements.

In partnership with One Love One Earth, Threshold is supplying a year's worth of Source Naturals Vitamin A to more than 500 children in Kenya and Rwanda, and a year's worth of multivitamins "for former child soldiers from South Sudan, and we are very grateful!" said One Love One Earth founder, Ashley Cox.

Two of our employees delivered the vitamins during a two week trip that proved to be an inspiring and emotional experience for Ashley Cox and KeiTung Liu from our R&D team. They made the journey themselves to safeguard the vitamins because supply shipments are often stolen by terrorist groups in this part of the world.

For Ashley, "meeting the former child soldiers from South Sudan was overwhelming. You can read about the horrors of children being thrown into war, but it becomes so real when you see the scars on their faces, the tears in their eyes. They have survived so much."

The vitamin A helps enormously in a country where there is 84% vitamin A deficiency (VAD). Per the World Health Organization, VAD is the leading cause of preventable blindness in children, and it significantly increases the risk of severe illness, even death, from such common childhood infections as diarrheal disease and measles.

Ashley founded the One Love One Earth Foundation after her experience teaching in Africa in 2013. "I was living in Kenya and working in the Kawangware slum outside of Nairobi, and it really hit me how nutrition could help these kids. My students could barely keep their eyes open during my lessons because they hadn't eaten that day or in several days." She created the foundation when she returned to the U.S.

"Becoming a non-profit with 501(c)3 status helped me reach out to the Santa Cruz [California] community, and we've been able to purchase sugar, porridge, rice, beans, medicines, first aid kits, backpacks, shoes, and school supplies." The foundation also helps the local community, and has handed out sandwiches and hot tea and raincoats to the homeless in Santa Cruz. And in the future, Ashley is hoping to partner with solar companies to bring electricity to African schools.

Also, through sales of Zembrin, Threshold is supporting a partnership with the San tribe of South Africa. Zembrin is made from the succulent plant *Sceletium*, which grows in South Africa and is traditionally used by the San tribe. Through the first ever export and bioprospecting permit issued by the South African Government, the San tribe is the beneficiary of any future profits that accrue from the commercialization of *Sceletium*. Threshold is proud to offer Zembrin under the Source Naturals label.

For more information please visit [www.OneLoveOneEarth.org](http://www.OneLoveOneEarth.org) and [www.zembrin.com](http://www.zembrin.com).

## Jeffrey S. Thornberry

Jeffrey S. Thornberry passed away suddenly on March 1<sup>st</sup>, 2017, at home in Brookside. He was 58. Born in Plainfield, he lived most of his life in the Brookside section of Mendham Twp.

Jeff served in the U.S. Army from 1977 to 1980 and was stationed at the 97<sup>th</sup> General Hospital in Frankfurt, Germany.

He received a B.S. Degree in Marketing from Rutgers University in 1986.

Jeff worked as a Director of Sales for Pascha Chocolate, based in Toronto, Canada for the past year. He was previously with Surf Sweets, Enjoy Life, and was with UNFI for 21 years. He worked in the natural and organic food industry for over 30 years where he forged lifelong friendships with many of his industry colleagues.

Jeff was a proud member of Brookside Engine Company #1 for 25 years, serving as Chief in 2003.

Jeff had a great love of the outdoors, and hiking in particular. He was a member of the Adirondack Mountain Club. He was also an avid music fan, having attended countless concerts through the years. His sense of humor and his love for family and friends will be greatly missed.

He was predeceased by his father Richard Thornberry in 1993. He is survived by his wife Elaine Thornberry, his son Matt Thornberry, his mother Mary Ann Thornberry, and his two sisters, Lucy Thornberry and Sarah Grub.

## In Memoriam





## New Arrivals

Dynamic Presence – East's Deanna Cozzo welcomed her new baby boy Vincent Dean Cozzo on Friday, March 3<sup>rd</sup> at 12:22 P.M. Vincent weighed 8lbs. 9oz. and was 21in long. Congrats to Deanna on her healthy baby boy!



Vincent Dean Cozzo

## Milestones

Presence Marketing – Midwest's Yesi Morales welcomed her new baby boy Anthony Morales on Wednesday, March 22<sup>nd</sup>. Anthony weighed 6lbs. 9oz. and was 20in long. Congrats to Yesi on her healthy baby boy!



Anthony Morales

## New Hires

### Presence Marketing

#### East

Cary Rosenberg

Retail Services Representative

#### Midwest

Evan Kingston

Retail Services Representative

#### Southwest

Chris Spencer-Cooke

Retail Services Representative

#### Rocky Mountain

Chad DeAguiar

Sales Representative

Robert Glover

Retail Services Manager

#### Northwest

Chris Spencer-Cooke

Retail Services Representative

#### West

Julie Young

Sales Representative

Jeanne Adamucci

Retail Services Representative

### Dynamic Presence

#### East

Sandra Scheiwe

Sales Merchandiser



## March Anniversaries

Christopher Taylor-Martin	Presence Marketing - National	18 Years
Nancy Konitz	Presence Marketing - National	16 Years
Jim Milis	Dynamic Presence - Midwest	15 Years
Sharon Kutella	Presence Marketing - National	14 Years
Sheri Yohn	Presence Marketing - National	14 Years
Rebecca Wineinger	Presence Marketing - West	10 Years
Crystal Stauffer	Dynamic Presence - Southwest	9 Years
Jim Perrone	Dynamic Presence - East	9 Years
Jeff Starn	Dynamic Presence - Midwest	9 Years
Kris West	Dynamic Presence - Northwest	9 Years
Siriporn Beland	Dynamic Presence - National	9 Years
Todd MacGrath	Dynamic Presence - East	9 Years
Doug Jones	Presence Marketing - Southwest	6 Years
Christina Moses	Presence Marketing - National	6 Years
Jennifer Hern	Dynamic Presence - National	6 Years
Eric Traugher	Dynamic Presence - Midwest	5 Years
Shawn Berg	Dynamic Presence - East	5 Years
Chris Virnig	Dynamic Presence - West	4 Years
Jason Eichenauer	Dynamic Presence - Southwest	4 Years
Katy Storm	Dynamic Presence - West	4 Years
Will Griggs	Presence Marketing - Rocky Mountains	4 Years
Aaron Curcio	Presence Marketing - East	3 Years
Anna Contreras	Presence Marketing - West	3 Years
Anthony Hughes	Presence Marketing - Northwest	3 Years
Jennifer Garfield	Dynamic Presence - East	3 Years
Katie Rigg	Dynamic Presence - Midwest	3 Years
Kristin Martins	Presence Marketing - National	3 Years
Rhonda Ketron	Dynamic Presence - Northwest	3 Years
Samantha Basham	Dynamic Presence - East	3 Years
Shannon Welch	Dynamic Presence - East	3 Years
Susan Davidoski	Dynamic Presence - East	3 Years
Brandon Romanoff	Presence Marketing - Midwest	2 Years
Erica Welch	Dynamic Presence - National	2 Years
Gina Stevenson	Dynamic Presence - Southwest	2 Years
Linda Porter	Dynamic Presence - Rocky Mountains	2 Years
Lindsay Taylor	Dynamic Presence - West	2 Years
Priscilla Spencer	Dynamic Presence - West	2 Years
Robert William Chavez	Dynamic Presence - West	2 Years
Scott Roper	Presence Marketing - West	2 Years
Victor Rojas	Dynamic Presence - East	2 Years
Brendan Martin	Dynamic Presence - Midwest	1 Year
Brendan O'Haire	Presence Marketing - West	1 Year
Kelly Bair	Dynamic Presence - West	1 Year
Gene Whalen	Presence Marketing - East	1 Year
Kim Kristofer	Presence Marketing - National	1 Year

## Help Wanted

### Location

Midwest  
Midwest  
Midwest  
Northwest  
Rocky Mountain

### Department

Finance  
Sales  
Sales  
Admin  
Sales

### Job Title

Accounts Receivable Manager  
Regional Sales Manager Assistant  
Sales Merchandiser  
Deductions Coordinator  
Sales Representative

# Help Wanted

For more information regarding job opportunities visit <http://www.pmidpi.com/careers/> or email [hr@pmidpi.com](mailto:hr@pmidpi.com).



### **Presence News Staff**

- ◆ Editor – Milton Zimmerman
- ◆ Associate Editor – Nikki Nolbertowicz
- ◆ Associate Editor – Asher Aronovich

### **Contributing Editors**

- ◆ East – Jacob Cook ◆ Midwest – Milton Zimmerman
- ◆ Southwest – Crystal Stauffer ◆ Northwest – Kari Dodson
- ◆ Rocky Mountains – April Morris ◆ West – Kaela Waldstein
- ◆ Distributor News – Pete Psaledas ◆ Data/SPINS – Jerry Strooboscher



# Presence

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