



# Presence News

## East

### Earth Fare's Closure Shocks Industry

The news of another prominent East Coast natural foods retailer closing up shop shook the grocery industry in early February. In abrupt fashion, on February 3<sup>rd</sup>, Asheville, North Carolina-based Earth Fare announced it would halt business operations and close all 50 locations, joining two other once-prominent and rising healthy foods chains shuttered in recent weeks. Colorado-based Lucky's Market announced it would be closing the banner, excluding seven locations purchased by management, and New York-based Fairway Market in January again filed for bankruptcy and is selling all stores.

In the days following both the Lucky's and Fairway announcement many insiders eyed the Asheville-based organic, natural foods grocer as a potential benefactor, especially in the Florida market where Lucky's closed 20 of 21 stores, and Earth Fare had its own plans in the works for 50 locations alone in the state. However, the future now holds no new store openings, no further growth and uncertainty for Earth Fare's reported 3,000 employees. The company began liquidation sales at all stores, which Earth Fare has throughout 10 states, immediately after the news was announced. Oak Hill Capital Partners, a New York-based private equity firm, currently holds a majority stake in Earth Fare. Oak Hill had acquired the equity interest in 2012 from Monitor Clipper Partners, which had owned Earth Fare since 2006.

The retailer's story first began in 1975 when a single store named Dinner for the Earth in Asheville opened. After expanding from a niche specialty store to a natural and organic minded full-service outfit in 1994 the Earth Fare banner name was created. In recent years, Earth Fare had seen tremendous expansion with stores in Alabama, Florida, Georgia, Indiana, Michigan, North Carolina, Ohio, South Carolina, Tennessee, and Virginia.

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# EARTH FARE®

## HEALTHY FOOD FOR EVERYONE

### Fairway Confirms Bankruptcy, Fire Sale














Last month, New York's Fairway Market filed for Chapter 11 bankruptcy protection and will sell all the company's locations throughout the Northeast. The official filing with the U.S. Bankruptcy Court for the Southern District of New York occurred on January 23<sup>rd</sup>. According to published reports, Fairway Market entered into a stalking horse asset purchase deal and will sell up to five Big Apple stores and its distribution center to ShopRite owner-operator Village Super Market for nearly \$70 million. Under the stalking horse agreement with Fairway, Village Super Market represents the first bidder for the stores, and what could be a pricing barometer for the court-supervised sale. The Springfield, New Jersey-based company will keep the Fairway store name and concept. Village Super Market currently operates 30 stores under the ShopRite banner in New Jersey, Maryland, New York, and Pennsylvania. The company also operates three stores under the Gourmet Garage banner name in New York City. Fairway Market offers a wide selection of fresh, natural and organic products and prepared foods, as well as a full assortment of conventional groceries. The struggling retailer continues to eye suitors for its remaining locations under the court supervised sale. Fairway has stores in New York, New Jersey and Connecticut.

The Chapter 11 filing marks Fairway's second in less than four years. In May 2016, parent company Fairway Group Holdings [made a Chapter 11 filing](#) in which lenders agreed to exchange existing debt for new equity and debt in a reorganized company. The retailer [emerged from Chapter 11](#) in June 2016. That came after Fairway couldn't overcome heavy debt and high costs that continued following an [initial public offering in 2013](#). The company was a rising star early on with aggressive expansion plans and dreams of potentially hundreds of stores. The master plan failed to come to fruition, however, and Fairway's continued struggles made a sale inevitable.

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## No Sunshine for Lucky's in Florida

A darling in the natural foods grocery sector announced abruptly late last month that it would be closing all but a single store in a competitive market once touted and highlighted for growth by the company.

Niwot, Colorado-based Lucky's Market was basking in the Florida sun, dotting the Sunshine State with over 20 stores opened and more than a dozen in the works. That all changed swiftly in January when news of Lucky's Market closing 20 of its 21 current locations in the southeastern state by February 12<sup>th</sup> made waves within the industry and beyond. According to published reports, the natural, organic centric grocer has also canceled plans for all 14 additional stores planned for Florida. The lone Lucky's Market to avoid the axe is in West Melbourne, Florida. The retailer, considered a growing competitor of Sprouts Farmers Markets, Earth Fare, Whole Foods Markets and others in the cleaner foods space focused expansion efforts on Florida over the past few years, having more stores in the state than any other in the company's portfolio, including its home state of Colorado. Rumors abound on Lucky's overall future beyond the Florida exit, as the banner continues to operate dozens of stores throughout 10 states. As speculation continues, many insiders point to Cincinnati, Ohio-based supermarket giant Kroger's investment in Lucky's Market. The large grocer had a stake in Lucky's since April 2016, but in early December reported it would divest its ownership shares. Both sides have stayed tight lipped on the financials of the original deal, and reasoning behind ending the partnership. With no stores in Florida, Kroger saw a strategic way into the state through Lucky's, but now the once promising duo ends after less than four years. Various media outlets are reporting that the ripple effect of the Kroger-Lucky's split will lead the retailer founded in 2003 by husband and wife chefs Bo and Trish Sharon to close even more stores, one source noting that only seven of the nearly 40 Lucky's Market locations would remain after the initial fire sale.

## Giant Stomping Footprint on Pennsylvania

With a giant announcement in January, one of the largest grocers in the country is going full throttle. Ahold Delhaize banner Giant Food Stores are already a leader in the Pennsylvania market, but the retailer's address at the January 9<sup>th</sup> Pennsylvania Farm Show in Harrisburg that it would invest \$114 million into its Pennsylvania stores over the next two years set another high benchmark for the grocer. Plans include opening two new stores, a new e-commerce hub and renovating 35 existing locations. Giant is expected to keep its focus primarily on the Philadelphia and central Pennsylvania markets. More than 160 of Giant's nearly 190 total stores, which also include locations under the Martin's Food Markets and Giant Heirloom Market banners, are in Pennsylvania, with the rest in Maryland, Virginia and West Virginia. Giant's operations in Pennsylvania account for about 27,000 of its overall 33,000 employees.

## Kroger Breaking Ground in Maryland

Cincinnati, Ohio-based Kroger has entered into an agreement with the world's largest dedicated online grocery retailer that will open an automated Customer Fulfillment Center (CFC) in a state where it has no active stores under that moniker. In late January, it was announced that supermarket powerhouse Kroger and online grocer Ocado will team up once again to create a 350,000 square foot CFC in Frederick, Maryland. The facility at 7106 Geoffrey Way is expected to be up and running 24 months after construction begins, according to reports. Kroger, with no stores under that name in Maryland, sees the move to expand its footprint throughout the Northeast. Kroger was also pulled to Frederick due to its proximity to major metro areas including Washington, D.C., Baltimore, and Philadelphia. This isn't the first time that the two operations have joined forces. In June, Kroger broke ground on its first CFC in Monroe, Ohio, and has since announced additional locations in Florida, Georgia, Wisconsin, Texas and the Mid-Atlantic. Kroger's deal with Ocado announced in May 2018 called for the construction of 20 highly automated grocery CFCs. The company is the fifth largest supermarket chain in the world.

## Whole Foods Market Ready in Richmond, Delray Beach

Whole Foods Market had two planned store openings along the East Coast in late January. The natural foods focused retailer, as of press time, planned on opening its new Whole Foods Market in Delray Beach, Florida on January 29<sup>th</sup>. The 41,000 square foot store is located at 680 Linton Boulevard. The store is the company's fifth in Florida's Palm Beach County, joining existing units in West Palm Beach, Boca Raton, Wellington, and Palm Beach Gardens. The Sunshine State has around 30 total Whole Foods Market locations. Traveling north the next day, the grocer is scheduled to fling the doors open on another new location, this time in Richmond, Virginia. The company's latest store located at 2024 West Broad Street was set to open on January 30<sup>th</sup>. The Richmond store will employ roughly 165 full and part-time team members. During opening ceremonies at both locations' complimentary coffee, pastries from local suppliers, music and the traditional bread breaking was all planned for the grand openings.



## Developer Nabs 23 Stop & Shops

A large supermarket swap recently in the New England market is reportedly worth roughly \$150 million. Massachusetts-based Winstanley Enterprises LLC and New York-based Surrey Equities LLC have reportedly acquired 23 Stop & Shop supermarkets. The \$150 million deal was first announced in January 2020. It includes Stop & Shop locations in New Jersey, New York, Pennsylvania, Virginia, North Carolina, South Carolina and Georgia, however, the bulk of the stores – 14 total – are located throughout the New England region. The commercial developers bought the portfolio as part of a long-term investment strategy. The properties are triple-net leased to Ahold Lease USA Inc., a subsidiary of Netherlands-based retail juggernaut Ahold Delhaize. [Winstanley](#) is also the company leasing [975,000 square feet of warehouse and distribution space](#) in Manchester, Connecticut to Ahold Delhaize USA. Those facilities service 200 Stop & Shop stores in New England and New York. [Ahold Delhaize USA](#) banners include Food Lion, Giant Food, Giant Martin's, Hannaford, Stop & Shop, and e-grocer Peapod.

## Stop & Shop Going Green

Ahold Delhaize controlled Stop & Shop, announced recently that it will be going green. The popular supermarket chain aims to shrink its carbon footprint at 40 supermarkets by switching to clean energy microgrids for electrical power. The stores are slated to deploy Bloom Energy Servers in an Always ON Microgrid configuration. Under the microgrid setup, the Bloom Energy fuel cells at each store can operate independently of the local electric grid, enabling them to continue providing electricity during a grid power outage. Bloom Energy Servers convert natural gas or biogas fuel into electricity without combustion, using solid oxide fuel cell technology. They also use no water in normal operation. The companies noted that the units, too, are much less vulnerable to extreme weather than overhead power lines because they receive natural gas or biogas fuel via an underground pipeline system. Plans call for installations of Bloom microgrids at Stop & Shop stores on Cape Cod, followed by other targeted stores in Massachusetts and Long Island, New York. It's uncertain at this time if the company plans on rolling out the microgrids at additional stores after the first 40 are up and running.

## Wegmans Jumping New York Ban

A popular New York grocer isn't waiting for a rule change in the state to take action. After some anticipation, and a trial run at two stores in July, Rochester, New York-based Wegmans Food Market has now pulled single-use plastic bags from all the company's New York stores. The move takes place more than a month before a state ban of the plastic bags goes into effect on March 1<sup>st</sup>. The company said it aims to transition all customers to reusable bags, which it considers the best way to address the environmental challenge of single-use bags. Its stores where the county or municipality hasn't already implemented a 5-cent fee for paper bags, Wegmans will charge 5 cents per paper bag. The amount collected from the paper bag charge will be donated to the local food bank serving each region.

## Georgia's Life Grocery Shuttered

After more than 40 years in business, a natural foods staple in Georgia has called it quits. Life Grocery in Marietta, Georgia was founded in 1976 by a group of students at nearby Life Chiropractic College. The students set out to sell organic and natural foods and supplements, which is exactly what Life Grocery did in the area for over 40 years until its recent closing in January 2020. A beacon in the Marietta natural foods community for many years, the last decade brought declining sales as competition moved into the area. With operating costs continuing to increase and the inability to update aging equipment or, their physical facility, the leadership of Life Grocery realized they could no longer operate profitably and were forced to make the difficult decision of shutting the co-op down, according to a company news release.

## Lucky's Market Closing All but Seven Stores

## Rocky Mountain

Lucky's Market confirmed that it will be closing all but seven stores. In an email to the Business Insider, Lucky's stated, "After exploring multiple alternatives, the decision was made to close various stores, in addition to a reduction in staff at the company's support office in Niwot, Colorado." All 2,500 employees as well as many customers were affected and deviated by the announcement.

After Kroger's announcement in December that it would be divesting from the company, some anticipated the news. In 2016, Kroger invested and undisclosed amount the Colorado based company. From 2016 to 2019 the chain grew from 17 stores to 39, where many of the new locations popped up in Florida.

The chain anticipates that the closing process for stores will take place over the next three weeks. Locations that are closing will be deeply discounting in-store merchandise during that time. As of now, the remaining stores include: Traverse City, Michigan; Cleveland, Ohio; Columbus, Ohio; Columbia, Missouri; Melbourne, Florida; and North Boulder and Fort Collins, Colorado.

Lucky's Market filed for Chapter 11 bankruptcy on Monday January 16<sup>th</sup>, 2020 in Delaware. The court papers list Kroger as owning 55% of Lucky's Market Parent Company LLC. With the help of Great American Global Partners LLC., liquidation for all stores that are closing will be complete by the end of February. Third party offers have been submitted for equipment and leases for about 26 of the 32 stores that are closing. Aldi Stores have already signed off on an asset purchase and are currently negotiating for select stores. The Chapter 11 bankruptcy allows the retailer to still operate the seven remaining stores specific terms to pay creditors. These are still being negotiated.

## Sprouts Farmers Market Names New CFO

Sprouts Farmers Market, one of the fastest-growing retailers in the nation, has hired Denise Paulonis as Chief Financial Officer. Paulonis, who previously served as CFO for the arts-and-crafts retailer Michaels from 2016 to 2019 and has also held senior roles at PepsiCo Inc. She will take over for Sprouts' interim CFO Lawrence Molloy on February 21<sup>st</sup>. Molloy had been serving as Sprouts' interim finance chief since June of last year upon the departure of Brad Lukow, who had in turn been serving as interim CEO after ex-CEO Amin Maredia left the company. Jack Sinclair was named the new CEO in June of 2019. With Paulonis and Sinclair now in permanent key management positions, the Phoenix-based company continues to strive for growth and defend its share of the natural and organic sector despite increasing competition from conventional retailers. Sprouts Farmers Market is known for its signature store layouts that feature fresh produce at the center of its stores as well as a large selection of bulk items and vitamin products to supplement their unique assortment of natural and organic grocery, bakery, meat and deli products. Employing over 30,000 team members, Sprouts has over 340 store locations in 22 states with plans to open at least 20 additional stores in 2020.

## Colorado Food Summit

On January 7<sup>th</sup>, the inaugural Food Summit was held at the National Western Complex in Denver, Colorado. The event drew over 300 attendees from across Colorado, sparking conversations about the current challenges in modern agriculture. The summit was carried throughout 11 separate sessions covering various topics—from revolutionizing farm-to-institution strategies to building direct-to-consumer outlets and creating a 30-year plan for Colorado's food systems. The event's mission was "to build linkages that meet diverse urban food goals while creating viable market opportunities that build wealth for Colorado farmers and ranchers and rural communities."

The summit was born from a CSU Food Systems Initiative grant, in cooperation with partners of the summit, to meet urban goals regarding food policies, programs and initiatives while supporting ranchers, farmers, regional communities and economies.

Pratyosh Kashyap, a Ph.D. student in agricultural economics at CSU, was one of the many volunteers at the event. He found that "[This summit] has been a good platform to see how the people involved are communicating, what each of them have to think and say about the issues, and what they're all doing."



## Naturally Boulder Goes National

Naturally Boulder was started in 2005 by a group of people in the natural product industry to form an organization that would be able to advocate on the natural industry's behalf. At first, it was merely a group of people looking to expand the natural industry for Boulder, Colorado. In the last 15 years, they have grown to over 1,500 members and become the hub for natural foods nationally.

Many affiliates from around the country began asking how they could replicate Naturally Boulder in their own communities. The past few years, Naturally Boulder has stepped in and taken a mentoring role for affiliate organizations nationally. As those factions have grown, the organization realized it needed a team that would focus on creating synchronicity between the groups. The groups came together and decided to create the Naturally Network, allowing the networking group to have a central team that will focus on national vision and let the regional teams focus on serving their communities.

Within the first half of 2020, leadership from retailers, manufacturers, investors and legal experts will all come together to build the Naturally Network team. Once a clear vision is set, members will be able to choose to have a local or national membership so they can attend events and make connections appropriately.



## Food Tank Summit Feature Indigenous Voices and Native Practices in Food Sustainability Models

Biodiversity in food, land acre property rights, and wild foods were integral topics of discussion at "The Wisdom of Indigenous Foodways" Summit held on January 22<sup>nd</sup>, at Arizona State University.

Indigenous knowledge of food systems will be front and center during the one-day event, in conjunction with Arizona State University Swett Center, University of Hawai'i Sustainable Community Food Systems and Food Tank – an organization dedicated to economically sustainable ways of alleviating hunger and seeking change in our current food systems. The opportunity to develop skills that serve new generations are taught in hands-on educational programs at each of the sponsor schools are striving to educate students and instructors alike to learn tools relied upon in many indigenous farming practices.

Which in turn, the event can respectively support the goals of building a thriving and vibrant local food economy and food equity in communities. The programs often partner with other various agricultural organizations, government policy makers and local retailers to support the vision of ecological sustainability, social equity and climate change resilience. The programs have been very successful in building a new vision of food system sustenance, as sharing knowledge is crucial to the future of sustainable food systems.

A variety of highly educated and informative speakers shared information about indigenous farming techniques, ethnobotany and highlights of re-transforming land and soil into sustainable farming models that are ever pertinent in our modern landscape.



## Harmons Grocery Announces New Buyer for 2020

The first week of January, Harmons Grocery in Salt Lake City announced that they are promoting Corey Jensen to the buying office as a buyer for dairy and meat deli items. Corey comes to the Harmons office with over 10 years of experience in the grocery industry. With natural and organic being his focus, Corey began in the grocery industry with Natural Grocers Vitamin Cottage at the Salt Lake City location. After a few years with NGVC, Corey began working for Harmons. Corey has worked in several departments over his seven-year career with Harmons, the latest being Store Manager at the Santa Clara store in southwest Utah. Congratulations Corey, the new buyer for dairy and meat deli items at Harmons Grocery!

Vertical farming company, Plenty, recently landed a distribution partnership with a handful of Whole Foods Markets and Safeway locations in the San Francisco area. This is the huge stride for Plenty, founded in 2013, who currently have their produce available at smaller retailers in their home base (the Bay Area): Good Eggs, Berkeley Bowl and Bi-Rite Market.

Vertical farming is not at the forefront of agriculture yet, but it's looking to make a huge impact, all for the better, with the immediate and long-term goal of preserving our land and resources. Here is a quick breakdown of this sustainable process: Crops are planted and cultivated on boards standing upright. A typical Plenty facility is about the size of a basketball court, instead of acres of outside land. The large warehouse is temperature and LED light controlled. Plants are grown without soil, or hydroponically – with mineral nutrient solutions in a water solvent. The water is administered via a sensor system and crops are given the exact amount of water needed to flourish. Plenty estimates that they use 5% of the water and 1% of the land a typical farm uses. All produce, from leafy greens to berries, are pesticide free and non-GMO, making everything ready-to-eat out of the box. Plenty employed farmers, quality control specialists and scientists work alongside each other, making these innovations possible.

The San Francisco farm, servicing the aforementioned Whole Foods Market and Safeway, launched in Summer 2019 and will hit capacity by the end of 2020, making it possible to supply more than 100 local grocers. Due to fundraising and investors, Plenty has raised over \$400 million and as a result, has plans to expand to Compton – a neighborhood in Los Angeles. By the end of 2020, produce such as bok choy, mizuna fennel and kale are expected to be ready to sell into L.A. retailers. It is important to Plenty for each farm to sell locally, so the produce is completely fresh and accessible (same-day deliveries).

CEO Matt Barnard says, “We are able to deliver a product that’s both better than and at a price that is less than anything that’s in the market. You are going to see us more and more on shelves. You are going to be able to find us, have us delivered to your home. We want our products in more people’s hands and mouths.”

They also operate a test farm in Wyoming, in order to experiment with different varieties. Plenty’s plans to ultimately have hundreds of farms in urban areas around the world.



Lassen’s Fresno Store Closure

Lassen’s Natural Foods & Vitamins, a 12-store INFRA chain based out of Ventura, California, has closed their Fresno store location, as of January 6th, 2020. There has been no public statement released from the corporate office yet, but this address has been removed from the store locations page on the Lassen’s website and a sign stating the closure was put on the store front. The Fresno store location opened in 2011, operating in the River View shopping center on N. Fort Washington Road. It was the sole location operating in Northern California. The remaining 12 locations in central and southern California remain operational.

The Food Marketing Institute Changes Name to The Food Industry Association

Trade group, FMI - The Food Marketing Institute, recently changed its name to FMI – The Food Industry Association. The Food Marketing Institute formally rebranded to use the acronym FMI. The organization adopted the tagline, The Food Industry Association, and FMI stands for Food Marketplace Inc. This change reflects FMI’s strategy to more broadly represent the food marketplace and embrace a more interconnected supply chain. Their philosophy and objectives remain the same: to share best practices, problem-solve and remain a resource to the food industry as a whole. However, the main difference that comes with the name change is its now expanding to become more inclusive. Membership will reach beyond retailers and will now include suppliers and other business partners.



“Today, we reveal a new FMI, one that outwardly embraces the new marketplace and a divergent, captivating new consumer,” FMI President and CEO Leslie Sarasin said in a blog post. “As The Food Industry Association, we will continue to propel the retail food industry forward by advocating for and supporting a safer, healthier and more efficient consumer food supply.”

Based in Arlington, Virginia, FMI has been active since 1977, when it merged with the Super Market Institute and the National Associations of Foods Chains. To name a little about what they do, FMI currently conducts and provide industry research, hold informational seminars and webinars, provide information on food safety, and also lobby at the federal, state and local legislative for food reform and policies. They also work closely with leading executives of food companies and industry associations.

“The environment around us at FMI – and in this reference I mean the businesses of the members we serve, the landscape of the association community in which we function, and the role we play in supporting every link in the supply chain from the grower, the manufacturer, the supplier and the retailer to the consumer – are all undergoing significant changes. Food – the way we grow it, move it, package it, sell it and consume it – is changing,” Sarasin continues in the blog. “All these changes in circumstance and culture have combined to provide us at FMI with an opportunity to evaluate our role, scrutinize where we truly add value, and determine exactly who and what we want to be as we move forward in this brave new world.”

## PC Greens Closes its Doors

After almost 28 years of serving the Malibu community, PC Greens closed their doors for good on November 10<sup>th</sup>, 2019. Last June, the Whole Foods Market – Malibu opened to great fanfare and it seemed to be final the deadly blow for PC Greens. However, it was not just the Whole Foods Market opening, but in combination with the 2018 Woolsey Fire, which seemed to have a major effect on not only PC Greens, but the entire community, from residents, to businesses, to restaurants, and shops.

PC Greens owner, Michael Osterman, made a statement to the Malibu Times, regarding the closing: “My family and I would like to thank the entire Malibu community for the love and support you have given us for the past 27 years. Lonnie and I had a very special vision for Malibu, which we were able to undertake and successfully fulfill. Sadly, after the devastating Woolsey Fire, it is no longer possible for us to continue with our mission.”

On Monday November 4<sup>th</sup>, the store began discounting their products and by Tuesday there were signs throughout the store advertising deals of discounts anywhere from 30% to 50% off storewide. It was the final attempt to try and recoup anything they could before closing the doors. Even with deep discounts, the store still had a hard time competing with some of the other markets in the area.

Nearly 40 former employees were left without work, but many were optimistic in finding opportunities elsewhere following their departure from PC Greens. There are still many local natural grocers, such as Erewhon, Vintage Grocers and Whole Foods Market, that would find value in someone coming from PC Greens. It was a somber end to a local independent grocer, where Osterman was typically present seven days a week in-store.

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## OB People's Co-op Organic Food Market Offers Store Tours for Children

Ocean Beach (OB) People's Co-op in San Diego is now offering store tours for children. The goal of the store tour is to teach children about the importance of good nutrition, organic foods and sustainable living practices. An ideal environment for learning about healthy nutrition, OB People's offers a large variety of 100% organically grown foods and products with an emphasis on minimally refined pure food that use environmentally sound production processes. Additionally, the products offered at OB People's are free of artificial colors, preservatives and additives.

On the fun-filled tour, children will receive healthy snack samples as well as a take-home activity book that contains games and puzzles to reinforce what they learn on the tour. Important reasons to eat organic food and other nutritional information are also included for families to read. OB People's believes that informed choices made by their customers have far-reaching impacts on the local and global community. Since, as the saying goes, “children are the future,” teaching them good nutrition and environmentally sound lifestyle choices from the start is essential. Peoples store tours are free of charge, by appointment and are approximately one hour long.

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## Sacramento Co-op's Member Days Event

Sacramento Co-op Member Days are taking place February 15<sup>th</sup> to 23<sup>rd</sup>. The Northern California retailer will have some exceptional deals for their shoppers. In preparation for the event, Sacramento Co-op sent thousands of mailers advertising in the surrounding area. Secondly, all the daily deals were featured on the flyer. And lastly, they also heavily advertised on social media and through email blasts from their mailing list. During Member days, Sacramento Co-op will encourage locals to come to the store via social media giveaways. Once in-store, a wide array of products will be steeply discounted, available for sampling and there will be free giveaways for specific products.

Sacramento Co-op is a hub of the Sacramento community. Began as a food buying club in 1972, they became an incorporated retailer in 1973. Over the years, they have had to move locations three times, as the store and variety of offerings became vast. In 2001, they opened their Cooking School & Community Learning Center, adjacent to the store, where they hold cooking classes, health seminars, member meetings and special events. The vision and purpose at the Sacramento Natural Food Co-op are to provide the benefits of natural foods and products, economic cooperation, and sustainable practices to as many people as possible in the communities that they serve. They also want to be a trusted source of natural foods and product, a reliable resource for consumer information and provide excellent customer service and a friendly and welcoming environment to all.

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## H-E-B Surpasses Trader Joe's in dunnhumby's 2020 Grocery Retailer Ranking

**Southwest**

San Antonio-based H-E-B Grocery Co. overtook Trader Joe's as the top-ranked grocery store in the nation, according to dunnhumby's 2020 U.S. Grocery Retailer Preference Index (RPI). The index analyzes the 60 largest grocery retailers to ascertain which companies have the strongest consumer loyalty and financial performance in the \$700 billion U.S. grocery market. As ranked by dunnhumby, the top 14 grocers in the U.S. are: H-E-B (No. 1), Trader Joe's (No. 2), Amazon (No. 3), Market Basket (No. 4), Wegmans, (No. 5), Costco (No. 6), Aldi (No. 7), Sam's Club (No. 8), Walmart (No. 9), Publix Super Markets (No. 10), WinCo Foods (No. 11), Fresh Thyme Farmers Market (No. 12), Sprouts Farmers Markets (No. 13) and ShopRite (No. 14).

H-E-B's first place ranking speaks to the financial success and customer loyalty to the company which operates over 400 stores across Texas and Mexico. The H-E-B brand is highly revered in Texas as one of the most beloved companies in the state. “H-E-B's move into first place – due to sustained focus and excellence on assortment relevance and private brand – is consistent with our findings that some regional grocers are getting stronger and are now going toe-to-toe with leading nontraditional retailers,” noted the dunnhumby report. It is the first year that ShopRite and Publix broke through the top quartile, while Market Basket made the biggest jump up in the top quartile. The statistical model is based on an online survey of 7,000 U.S. households to gauge consumer preference and emotional bond, combined with analysis of each retailers' financial position in market share, sales per square foot and sales growth.

According to the report, stores ranking the highest also have the strongest value perception – a combination of good prices and high-quality products. “One of the most important findings is that leading traditional regional grocers [like H-E-B] are experiencing a resurgence in customer preference, by winning with relevance and convenience,” Jose Gomes, North American president of dunnhumby, says in a release. “If they can compete on price and quality – the value core for grocers – they are especially well-positioned to fend off the growing threat of non-traditional players. This also leaves them better insulated against an economic downturn.” While price and quality are the core values for customers, price remains the most important pillar for shoppers across all income levels.

## Whole Foods Market to Update Private Label Branding

Whole Foods Market is rebranding its 365 private label products with a modern black background and a new shape for the logo. The tagline will also change from "Everyday Value" to "Whole Foods Market." The new label is slowly rolling out to stores and multiple product images have been updated on Amazon. The change was initially spotted by IGD at the Columbus Circle store in New York City with a shelf tag reading, "The quality you love has a fresh new look!" The in-store sign with multiple rebranded product images notified customers that the change will be cross-category. Whole Foods Market's 365 private label launched in 1997. The line advertises value prices on natural and organic products, all formulated to meet Whole Foods Market's quality standards. Whole Foods Market's private label brands also include Whole Foods Market, Whole Trade and Engine 2 plant-based products. Amazon's acquisition of Whole Foods Market has boosted online sales of 365 branded products.



## Randalls to Close Five Houston Locations

Randalls will shutter five grocery stores in Clear Lake, Kingwood, Spring and The Woodlands next month, continuing its withdrawal from Houston's competitive grocery market. Randalls, a division of Albertsons Companies' Southern Division, has stores in Houston and Austin. Randalls is closing the stores located at 4540 Kingwood Drive and 600 Kingwood Drive in Kingwood; 2250 Buckthorne Place in Spring, 4775 West Panther Creek in The Woodlands and 2323 Clear Lake City Boulevard in Houston.

The closures will bring the Houston store count from 51 stores at its peak in 2005, down to 17 stores, comprising less than 4% of the grocery market share. Liquidation began mid-January and stores are expected to close by February 15<sup>th</sup>, affecting 365 employees. "In such a competitive environment, our company must sometimes make tough decisions to close underperforming stores so that we can reinvest in our remaining stores in the marketplace," Randalls spokeswoman Christy Lara said in a statement. "We are working diligently to place as many employees as possible in other locations, and we remain committed to the Houston market area."

Historically Randalls stores have catered to the upper-middle class, but with its higher prices and smaller stores, the format cannot compete with stores offering lower prices and twice the selection. Randalls' major competitors in the area include H-E-B, Kroger and Walmart, each of which comprise roughly 25% of the area's grocery market share.



## Belden's in Houston Closes Last Remaining Store

Belden's grocery store was a fixture in Houston's Meyerland neighborhood for over half a century and a staple of Houston's Jewish community. The family-owned, neighborhood market closed last month due to declining revenues since Hurricane Harvey. Meyerland was one of the areas hardest hit by the Category 4 hurricane that caused massive flooding in Texas and Louisiana in August 2017. "In the Meyerland area, we've had three major floods in three years," said store director Darryl Ames. "After Hurricane Harvey, a lot of our longtime customers left the area." Until homes are rebuilt and residents move back, local businesses are suffering with declining sales.

Belden's was a mainstay for the area's many Jewish residents, some of whom have shopped at Belden's stores since the 1950's. The Meyerland Belden's was open for 30 years and was the last remaining store in the chain. The large kosher department, fresh kosher meat, and imported Israeli products were a big draw for the Jewish community. "I ran the kosher department for years before I was the store director," Ames says. "It's been a pleasure to work with the Jewish community. I've made a lot of friends here. I'm definitely going to miss the store." Belden's would have faced increased competition from two new H-E-B's coming to Meyerland. The 95,000-square-foot H-E-B set to open in Meyerland Plaza is going to have a large kosher department, including a kosher butcher.



## United Supermarkets Opens First Texas WIC Clinic Inside Grocery Store

Last month, Texas Health and Human Services opened a Women, Infants, and Children (WIC) supplemental nutrition program inside the United Supermarkets on Parkway Drive in Lubbock. It is Texas's first WIC clinic inside of a grocery store. The WIC program provides supplemental foods, health care referrals, and nutrition education for low-income pregnant women, postpartum women, and to infants and children up to age five who are found to be at nutritional risk. The clinic will make it easier for families to access services such as nutrition education, breastfeeding support, and critical referrals to medical and social services. "At Texas Health and Human Services, our vision is to make a positive difference in the lives of the people we serve," Texas WIC Director Edgar Curtis said. "With this effort, our goal is to make it simple and convenient for families to access important services that can improve health and well-being." Both WIC and United Supermarkets have similar goals of providing healthy foods and nutritional education. This alliance allows WIC participants to receive and redeem benefits in one place, reducing the strain of transportation and guaranteeing access to nutritional counseling.



## Building Permits Issued for Uptown Dallas Central Market

Developers have filed building permits to move ahead with a new Central Market on McKinney and Lemmon Avenue in Uptown Dallas. The H-E-B-owned store will anchor a \$200 million, 19-story tower with retail and restaurants on the bottom floors and office space, hotel and residential projects above. The Central Market grocery store will occupy the bottom floors. The property has been vacant since the Albertsons supermarket closed four years ago. The new Uptown location will be the largest Central Market in North Texas and the third new grocery store to open in Uptown in recent years. Whole Foods Market opened a location on McKinney Avenue at Routh Street in 2015. Last year, Albertsons Cos. Opened its first urban Tom Thumb in Dallas in the Union development at Field Street and Cedar Springs Road just north of downtown. Albertsons is also planning a second Tom Thumb on Live Oak in a new apartment high-rise in east downtown Dallas.



## H-E-B plans \$200 Million Expansion in South Austin

H-E-B Grocery Co. announced it will expand its presence in the South Austin area with a \$200 million investment. The funds are earmarked for three new stores and a major remodel. Austinites are excited to welcome a new 130,000-square-foot H-E-B at Slaughter Lane and I-35, and a 90,000-square-foot H-E-B at U.S. Highway 290 and FM 1826. The Slaughter Lane store is expected to open next month and the Hwy 290 store later in the year. The third location is currently under construction at South Congress Avenue. The multi-story, 130,000-square-foot store is expected to open in 2022. The South Congress location was one of the oldest H-E-B stores in Austin.



A largescale remodel is also underway at the East Riverside Drive H-E-B plus! Supermarket, including a 7,000-square-foot extension. The renovations will include an expanded grab-and-go meal section, featuring H-E-B's Meal Simple and Sushiya sushi. The Curbside pickup addition will be one of the largest in the chain. Riverside Drive has lot of University of Texas housing, making the investments in convenience options a good bet for H-E-B. "This level of investment has been years in the making, and we are incredibly excited to deliver fresh, new stores to this growing community," Jeff Thomas, senior vice president and general manager for the Central Texas region at H-E-B, said in a statement. "Next year, we will showcase an unprecedented investment in new stores across the greater Austin area, especially in South Austin where our customers will soon be receiving the best and most advanced shopping experience H-E-B has to offer." South Austin is growing rapidly and H-E-B plans to adapt to the growth with continued investments in the area.

## Brookshire's Hosts Grand Re-Opening in El Dorado

Brookshire Grocery Co. unveiled a newly redesigned store at 2200 N. West Avenue in El Dorado, Arkansas. The grand opening celebration and ribbon cutting included a 13-foot-tall motorized grocery cart, which store employees rode around the parking lot. The store has been updated with the latest features including modern displays and shelving, refrigerated cases, new shopping carts, updated exterior decorations and signage, energy efficient lighting and new flooring. In attendance was Brad Brookshire, the company's Chairman and CEO, who said the modernized features have been very popular with customers. "It's a whole new store inside," Brookshire said. "With the revitalization of your downtown, the Murphy Arts District and all the growth, we want to help contribute to this market." El Dorado's growth in recent years made the city a target for economic development. Brookshire announced during the grand opening that the other Brookshire store in El Dorado will also undergo modernizing renovations in coming months.



## Amazon's Revolutionary Payment System in the Works

Amazon has submitted a patent application to the US Patent and Trademark office for a touchless scanning system, which would identify people using characteristics of their hands and palms, including wrinkles and veins. Amazon Go cashier-less stores have implemented a new touchless scanning system that may allow customers to enter by simply scanning their hand.

The application filing does not confirm the development of the touchless scanning system, but in September 2019, the New York Post reported Amazon testing similar technology that could allow Whole Foods Market customers to scan their hands for payment rather than swiping a card. If the technology does move forwards, Amazon might consider using it at their Amazon Go locations. Various investors listed on the application are employees working with Amazon Go, including Dilip Kunmar who serves as Head of Technology for the stores and Vice President of Amazon's physical retail initiatives.

Details surrounding the patent describe "a scanner device [that] is used to obtain raw images of a user's palm that is within a field of view of the scanner. The first set of images depict external characteristics, such as lines and creases in the user's palm while the second set of images depict internal anatomical structures, such as veins, bones, soft tissues, or other structures beneath the epidermis of the skin." It also notes the placement of these scanning devices at entrances and exits of given locations and associating a scan with personal accounts so that "if the user picks an item up from an inventory location and leaves the facility, their account may be billed for that item."

Amazon opened their first Amazon Go location nearly two years ago on the ground floor level of its Seattle headquarters. Since then, they have opened 23 additional locations across the United States. All 24 stores currently use a special Amazon Go application to gain entry and rely on a combination of sensors and cameras allowing customers to take items off shelves and exit without having to stop and pay. Each customer's account is linked through the app and is automatically billed upon exit.

## Northwest



## 16 Years of Chocolate Goodness in Oregon

The 16<sup>th</sup> Annual Oregon Chocolate Festival will be held between March 6<sup>th</sup> and 8<sup>th</sup> at the Ashland Hills Hotel and Suites. Every year, the festival features dozens of dreamy, mouth-watering creations of West Coast Chocolatiers. Several events have come to be associated with the Oregon Chocolate Festival, including a competition including an artistic display in the hotel lobby. Most notably, Charlie's Chocolate 5k and 10k train run/walk will be held at Emigrant Lake Recreation area, where everyone is encouraged to dress as their favorite Charlie and the Chocolate Factory character. Additional events may be found on their website, ranging from chocolate-inspired meals to a 1970's themed dance party.

In previous years, the festival has donated over \$10,000 to the Asante Neonatal Intensive Care Unit in Medford, Oregon, making love for chocolate impact the local community's financial health.



## 12<sup>th</sup> Annual Mid-America Organic Association

The 12<sup>th</sup> annual Mid-America Organic Association Conference (MOA) was held between January 23<sup>rd</sup> and 25<sup>th</sup>, 2020, hosted at Stoney Creek Hotel and Conference Center near Kansas City, Missouri. This year's theme was Digging Deep, including workshops regarding organic Primer, Row-Crop Farming, Market Gardening, Livestock and other specialty topics. Microbiologist Tradd Cotter educated attendees on mushrooms, while Scientist Ray Archuleta spoke about soil science, and Terry Durham, a longtime sustainable agriculture advocate, highlighted Elderberry Culture. In addition, five half-day "Intensive Tracks", ranging from Hemp, Elderberry, Mushrooms, Value Added Products and Poultry, were included to enlighten participants.

The Mid-America Organic Association Conference is a networking event for farmers, business owners and consumers who share common interests in sustainable and organic agriculture. The association promotes a healthy environment and supports the diversity of independent farms through social media.



## Marlene's Markets' Community Embrace

February is the last month of winter in the Pacific Northwest and with warmer weather on the horizon, it is a perfect time to celebrate the heart-warming holiday, Valentine's Day. Coincidentally, February also happens to be American Health Month.

Marlene's Markets is offering multiple workshops on heart health, ranging from a "Happiness Playshop", where attendees are invited to join a happiness enthusiast to learn about the cultivation of joy based on current neuroscience research, to a "Loving Yourself" class about self-care and tending to personal needs first in order to effectively care for others.

In a time when self-love is encouraged, local retailers are stepping up and providing their communities with helpful tools for leading a healthy lifestyle. The hearty workshops can be found in Marlene's Markets located at 2565 S. Gateway Center Place in Federal Way, Washington and 2951 S. 38<sup>th</sup> Street in Tacoma, Washington.

## Moscow Bakehouse Expansion

The Moscow Cooperative Bakehouse is at it again – growing, expanding and moving off-site! The co-op has historically provided their customers with delicious scratch-based goods, however as their community grows, so does their need for additional space. By the end of February, they expect to have moved their bakery to an off-site location, once home to Panhandle Artisan Bread Company. The bakehouse employs 16 bakers in 1,600 square feet space, which holds a steam-injection oven, a rack oven and a convection oven. They are proud to preserve a piece of Moscow's culinary history within their community.

They create amazing breads, pastries, pies, cookies and more, along with special gluten-free and vegan orders. With limited space, it was not uncommon to see multiple cooling racks of cookies along hallways. When speaking with Steve Cords, their lead Marketing Manager, he expressed that their new location will provide more space to curate new offerings. It will not, however, be a retail space, and will deliver baked goods to their main store and their location at the University of Idaho campus.



## Ratcheting Down In Wisconsin

It's gotten very crowded in the grocery market in Wisconsin, with significant amounts of competitive activity largely dominated by technological changes. Digital Marketing is hot and online shopping is suddenly popular.

Dominating the scene are Roundy's Banners, Copps and Pick N'Save, and the Woodman's Markets, with HyVee, Festival Foods, Sendik's and Meijer, as well as Super Target, Walmart Super Centers and Club Stores Sam's and Costco. Even hybrid operators, Aldi, Fresh Thyme and Whole Foods Market, too, all occupying key real estate and taking market share.

With a food fight of this scale, for operators in Wisconsin, standing still is not an option.

# Midwest

## Ratcheting Down In Wisconsin cont'd

Kroger is investing approximately \$55 million to build an automated fulfillment center in Pleasant Prairie, which geographically allows service to Chicago and Illinois and N. Indiana suburbs and a significant portion of Wisconsin, including key urban markets, Milwaukee, Green Bay and Madison. Although the operation will involve 100's of new jobs, robots in this automated facility will fulfill online orders in about five minutes.

Fending off Amazon and its partnership with Whole Foods Market is a key front for Kroger as they plan to operate up to 20 similar facilities across the Country. Amazon is currently operating one distribution center in Kenosha and has plans for another in Oak Creek, located just South of Milwaukee proper.

Walmart and local grocers including Sendik's, Woodman's and Festival Foods, all offer digital grocery shopping options.

## Schnucks Increases Focus on Health and Wellness in 2020

Schnuck Markets has announced that they are increasing the focus on health and wellness in 2020 with new and exciting programs. Schnucks recently announced they will end the sale of any tobacco products in its grocery stores, effective January 1<sup>st</sup>, 2020. To add to the awareness of health and wellness, Schnucks has expanded its gym partnership and health kids' field trip programs and has launched a community-wide step challenge for its customers.

Schnucks customers who complete the step challenge by February 29<sup>th</sup>, 2020, will be entered in a drawing for the chance to win 50,000 Schnucks Reward points worth about \$100. Any customers interested in the challenge should follow the instructions found on Schnucks website.

Schnucks' is also launching a new health and wellness program 'Eat Good to Feel Great.' This program includes healthy recipes and tips in its magazine, Simply Schnucks, and additional resources at Schnucks.com. The program will include some in-store signage and displays for their customers to find healthier options. Schnucks is also sponsoring the NHL All-Star 5K in downtown St. Louis on January 25<sup>th</sup> as the NHL All-Star game is being held in St. Louis for the 2019-2020 season.

Schnuck Markets, the Maryland Heights-based grocer founded in 1939, operates 112 stores in five states: Missouri, Illinois, Indiana, Iowa and Wisconsin. According to Forbes' 2019 rankings, Schnucks is the 16<sup>th</sup> largest privately-owned grocer in the United States employing 14,000 teammates.



## Target Resets Leadership

Target announces leadership changes and the retirement of Executive Vice President and Chief Stores Officer, Janna Potts. Janna has held a variety of leadership roles and has been with the company over 30 years. With Janna Potts departure, Mark Schindele will take over this position.

Janna played an integral role as the lead architect in the successful new remodel of nearly 1,900 stores which has enhanced the retailer's focus on guest service, online business and convenient store-based delivery and pick up options.

Mark has been with Target for almost 20 years. His prior rolls consist of leadership roles in merchandising, sourcing and operations. His most recent roll was serving as Senior Vice President of Properties. Mark was responsible for leading the company's remodel, small-format strategies, elevating the shopping experience and introducing Target to new guests in densely populated areas.

Target's CEO, Brian Cornell stated, "I'm confident Mark brings the right set of diverse experiences to realize even more potential for Target. His passion for retail, Target and our team, coupled with his understanding of our end-to-end business, make him well-positioned to lead our Stores organization into 2020 and beyond."



## Kroger's Simple Truth Emerge Plant-Based Meat Roll-Out Launches

Kroger Co. is keeping up with the latest food trends. One of the nation's fastest-growing categories in food is plant-based meat. Therefore, Kroger is adding Simple Truth Emerge to its flagship natural/organic Simple Truth brand. Last month, Kroger kicked off a 16-week merchandising test with the Plant Based Foods Association (PBFA) at 60 stores in Denver (King Soopers) and parts of Indiana and Illinois (Kroger Central division).

The pea-based meatless option will be sold in burger patties and grinds and will be merchandised in the traditional packaged meat case in a three-foot plant-based meat set with other meat alternatives such as deli slices, seitan and jackfruit. The product offers 20 grams of protein per serving; is free of GMO's, dairy, gluten and soy; and offers the same taste, texture and sizzle as beef when cooked in a pan or on a grill.

According to Kroger, they will be able to offer their customers living a flexitarian lifestyle a more affordable price than comparable brands of plant-based meat. They also plan to add an additional 50 plant-based food products under the Simple Truth banner in 2020. Their Simple Truth brand exceeded \$2.3 billion in 2019 with their more than 1,550 product portfolio. Reports show the U.S. retail sales of plant-based foods totaled \$4.5 billion over the past year, which is an 11% growth from 2018. Behind dairy, meat was the second largest of the plant-based food categories. Sales of plant-based meat alone rose 10% last year to about \$801 million, representing 2% of overall retail packaged meat sales.



## Deb Conklin Joins KeHE Distributors' Board of Directors

# Distributor News

KeHE is pleased to announce the newest addition to its Board of Directors, Deb Conklin.

Conklin is the Chief Executive Officer of Reddy Ice, the nation's largest packaged ice manufacturer and distributor. Prior to her current role, Conklin was a Managing Director of Centerbridge Partners' Portfolio Operations, most recently acting as interim CEO of Pei Wei Fresh Kitchen. She has also been COO of Helix Poly and a Senior Operations Advisor at TPG Capital.

"We are excited to welcome Deb to our Board of Directors," stated Brandon Barnholt, President and CEO of KeHE. "Her deep expertise in governance, corporate leadership, financial value creation, and talent development will truly help drive KeHE on our journey to become the 'Next Generation' distributor. We were also drawn to her alignment with our core value of serving others."

Conklin was selected following a nationwide candidate search. She holds a Master of Business Administration degree from Queens College and a Bachelor of Science degree in Industrial Engineering from Clemson University.

## UNFI Third Party Billing Admin Fee Change

Effective February 2<sup>nd</sup>, 2020 the new fee structure will be a minimum \$20 fee per invoice and a maximum \$500 fee per invoice. All other parameters of the program, including the 10% administration fee rate, will remain the same. These charges will be applied and deducted on all third-party billing services.

## Exciting SPINS Market Place Developments

# Data Update

When the Natural industry movement began in earnest (more than 25 years ago), a natural product would primarily only launch in a pure natural retailer. Today, due to the growth and demand for natural products, consumers can find natural/organic products in more places than ever before and we find the line blurring between natural and specialty gourmet stores and products. SPINS is evolving with these changes by creating the New SPINS Marketplace, which will be referred to as the SPINS "Natural Enhanced" Channel.

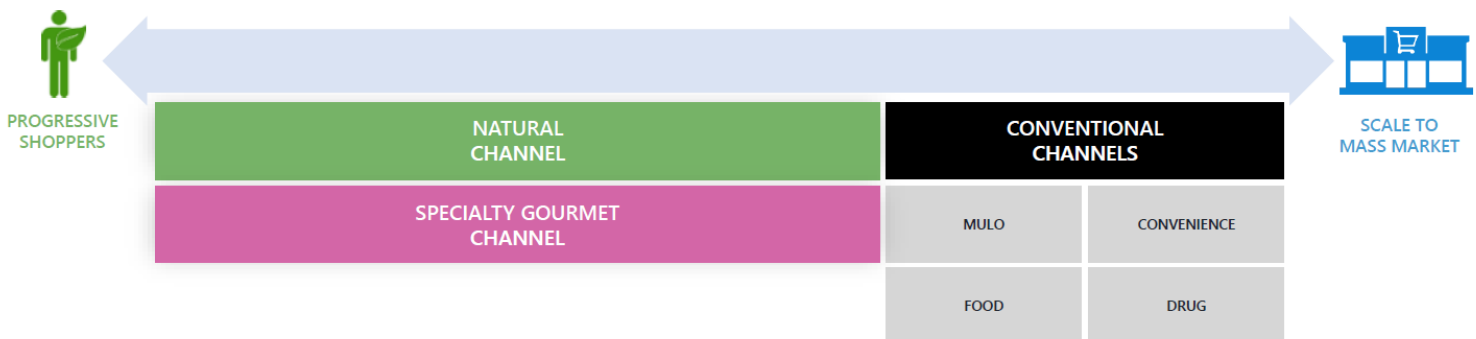
With our P1 February 10<sup>th</sup>, 2020 data release, SPINS will be releasing this new channel which brings numerous retailers that were previously included in our SPINS Specialty Gourmet Channel into the new Natural Enhanced Channel. All retailers in our current SPINS Natural channel will also move into this new channel, together creating the Natural Enhanced channel. There has been extensive communication over the last few months to SPINS clients regarding the significant benefits for this channel as well as estimating volume changes with these February changes. We encourage manufacturers with questions to reach out directly to SPINS Support at [customersupport@spins.com](mailto:customersupport@spins.com).

Additionally, the Specialty Gourmet Channel will be retired upon the Period 1 launch. You'll see a number of new developments emerging from the new SPINS Marketplace in upcoming months while SPINS is providing early views to their retailer partners in Period 1. New exciting developments for regional and independent grocery and also independent pet specialty will be released soon.

Clients will continue to receive all of their current Key Accounts with this updated release regardless of which channel the Key Accounts have participated through previous periods. You should also expect to see numerous new Key Accounts released from SPINS in upcoming months.

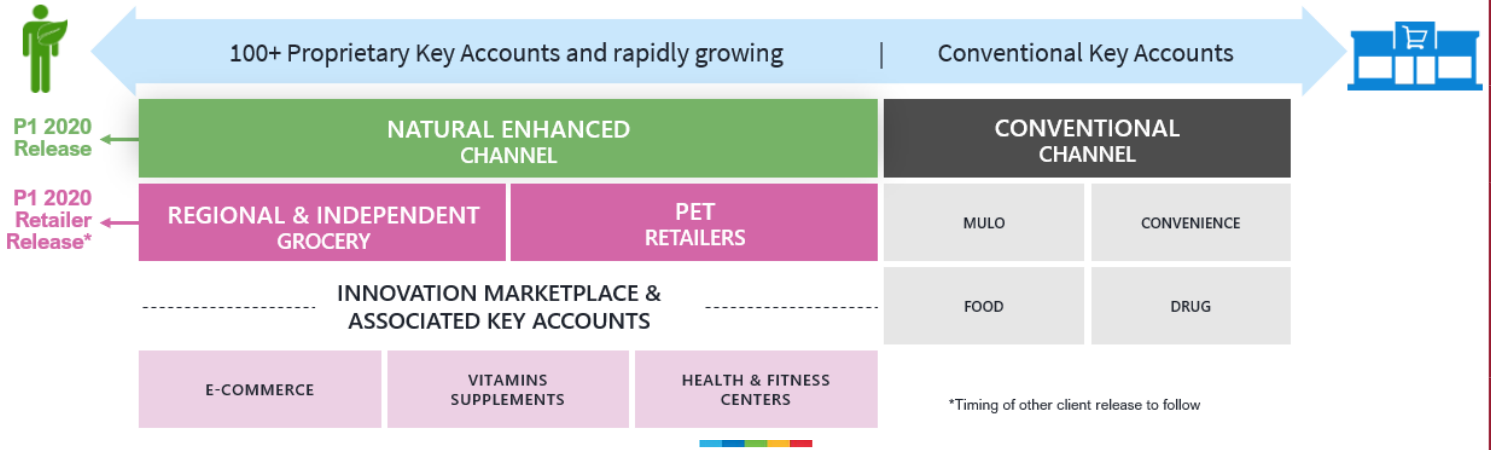
## SPINS MARKETPLACE TODAY...

SPINS' current picture of the retail landscape, inclusive of innovative retail outlets, helps you navigate and scale.



# THE MOST EXPANSIVE VIEW OF INNOVATION ACROSS THE RETAIL LANDSCAPE

RELEASING FEBRUARY 2020



## THE NEW SPINS MARKETPLACE NEW NATURAL ENHANCED CHANNEL RELEASING FEBRUARY 2020

### NATURAL ENHANCED CHANNEL DEFINITION



**Includes:**

- ✓ Full-format stores with \$2 million+ in annual sales and 40% or more of UPC coded sales from natural/organic/specialty products
- ✓ Includes co-ops, associations, independents, large regional chains over \$27B in total Sales
  - ✓ All the Retailers that are currently in the Natural Channel – no Natural Retailers are removed
  - ✓ Many Retailers in the current Specialty Gourmet Channel are moving into the new Natural Enhanced Channel
- ✓ Encompasses over **1,850 stores**

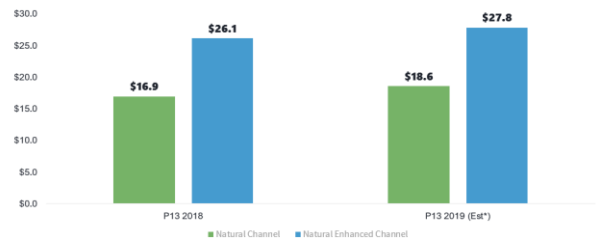
**Does NOT Include:**

- Whole Foods
- Trade Joes
- Vitamin & Supplement-focused Retailers
- Ecommerce

The Natural Enhanced channel will represent over \$27B in total sales, encompassing more than 1,850 stores. This channel will be 50% larger than today's Natural channel, with an anticipated 6.5% year-over-year growth.

### NEW CHANNEL UNIVERSE SIZING

The Natural Enhanced Channel is 50% larger than today's Natural Channel



Total Market ACV (\$ Billions)

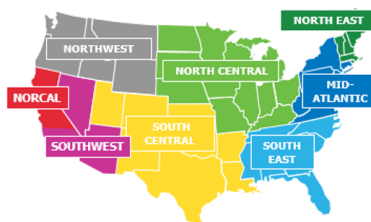
## Exciting SPINS Market Place Developments cont'd

As for regional boundaries, there will be no changes. Regions will remain consistent with the current Natural channel definition.

# THE NEW SPINS MARKETPLACE NATURAL ENHANCED REGIONS

- ✓ The existing 8 natural regions and 4 census regions will continue
- ✓ The channel is comprised of 45+ chains and 650+ independent stores

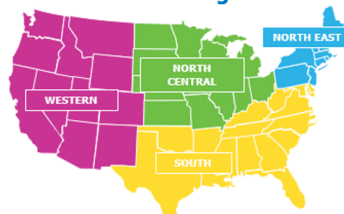
### SPINScan Natural Enhanced Regions



### Leading Natural Enhanced Supermarkets

Earth Fare	Bristol Farms
Fresh Thyme Farmers Market	Heinen's
Natural Grocers by VC	Market of Choice
New Seasons Market	Sunset Foods
Sprouts	The Fresh Market

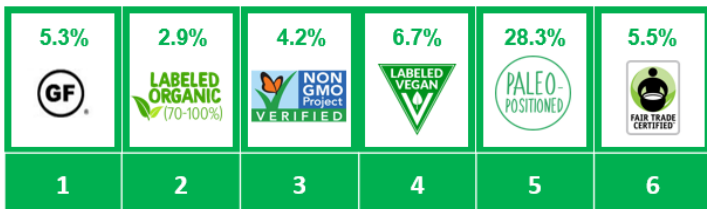
### SPINScan Natural Enhanced US Census Regions



For more information on upcoming changes, including frequently asked questions, please visit our SPINS website [www.spins.com/newmarketplace/](http://www.spins.com/newmarketplace/)

### Attribute Ticker

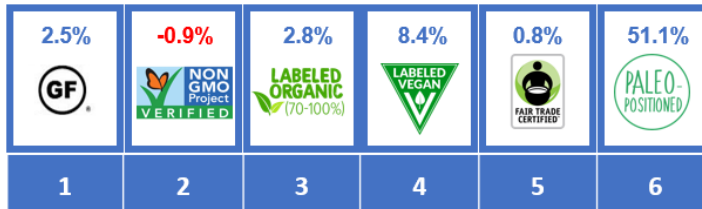
#### Total US – Natural Channel Dollars vs. YAGO



Source: SPINScan Natural, 52 Weeks Ending December 29, 2019

#### Rank by sales volume

#### Total US – Conventional Channel Dollars vs. YAGO



Source: SPINScan Conventional TOTAL US FOOD, 52 Weeks Ending December 29, 2019

#### Rank by sales volume

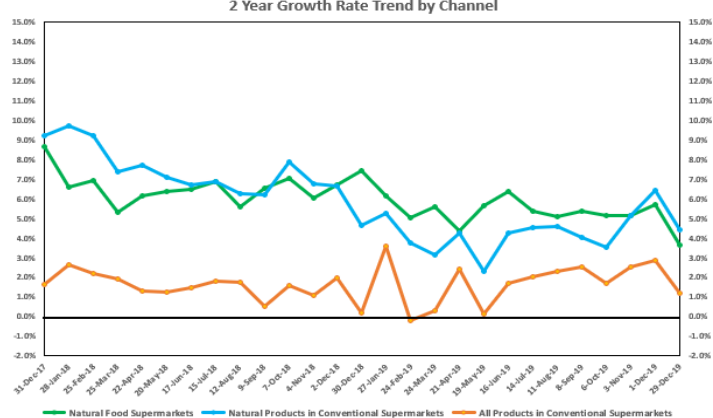
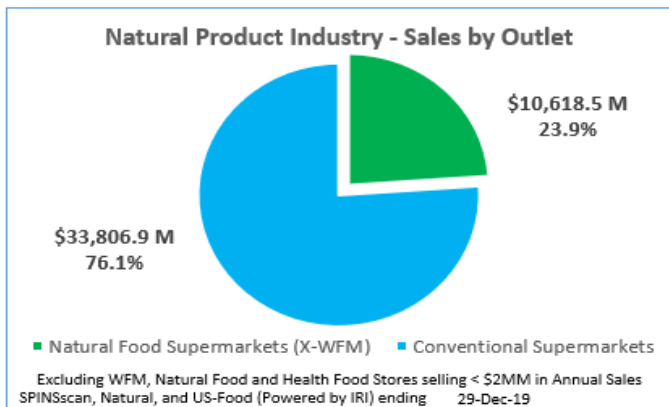
### Data Ticker

NATURAL FOOD SUPERMARKETS				NATURAL PRODUCTS in CONVENTIONAL GROCERY				ALL PRODUCTS in CONVENTIONAL GROCERY			
% of Total	PRODUCT GROUP	52 WEEK DOLLARS	% vs YA	% of Total	PRODUCT GROUP	52 WEEK DOLLARS	% vs YA	% of Total	PRODUCT GROUP	52 WEEK DOLLARS	% vs YA
36.0%	TOTAL CHANNEL	\$10,618.5 M	5.3%	41.1%	TOTAL CHANNEL	\$33,806.9 M	4.3%	42.7%	TOTAL CHANNEL	\$330,591.9 M	1.8%
18.6%	GROCERY	\$3,827.0 M	6.1%	26.5%	GROCERY	\$13,895.0 M	4.1%	15.8%	GROCERY	\$141,276.1 M	1.6%
11.2%	REFRIGERATED	\$1,975.5 M	6.9%	12.8%	REFRIGERATED	\$8,969.4 M	2.9%	15.1%	REFRIGERATED	\$52,147.0 M	0.9%
9.9%	VITAMINS & SUPPLEMENTS	\$1,190.0 M	2.2%	7.6%	FROZEN	\$4,318.9 M	3.5%	8.4%	FROZEN	\$49,849.9 M	1.6%
7.3%	FROZEN	\$1,049.8 M	6.6%	5.2%	PRODUCE	\$2,568.1 M	4.5%	7.2%	GENERAL MERCHANDISE	\$27,780.4 M	2.0%
4.9%	PRODUCE	\$776.3 M	9.6%	3.4%	GENERAL MERCHANDISE	\$1,768.8 M	12.7%	5.7%	ALCOHOL	\$23,958.9 M	4.3%
4.6%	BODY CARE	\$525.3 M	-1.4%	1.8%	VITAMINS & SUPPLEMENTS	\$1,135.2 M	4.4%	2.4%	PRODUCE	\$18,824.0 M	2.8%
3.5%	ALCOHOL	\$484.7 M	4.0%	0.8%	BODY CARE	\$598.8 M	6.3%	1.7%	BODY CARE	\$7,970.2 M	0.0%
2.2%	HERBS & HOMEOPATHIC	\$370.2 M	0.2%	0.8%	ALCOHOL	\$270.2 M	8.8%	0.9%	(OTC) MEDICINES	\$5,500.1 M	2.8%
1.6%	GENERAL MERCHANDISE	\$235.1 M	4.3%	0.0%	HERBS & HOMEOPATHIC	\$279.6 M	7.0%	0.9%	VITAMINS & SUPPLEMENTS	\$2,938.9 M	2.5%
0.1%	OTHER	\$172.5 M	2.5%	0.0%	(OTC) MEDICINES	\$2.9 M	5.4%	0.1%	HERBS & HOMEOPATHIC	\$346.4 M	7.6%
0.1%	(OTC) MEDICINES	\$12.2 M	7.8%								

SPINScan Natural (proprietary) ending December 29, 2019

SPINScan US – Food (powered by IRI) ending December 29, 2019

SPINScan US – Food (powered by IRI) ending December 29, 2019



Looking for more info? Please contact the SPINS Account Manager for Presence Marketing/Dynamic Presence, Mike Murphy at [mmurphy@spins.com](mailto:mmurphy@spins.com).

**News Roundup: NCG Co-ops Named as Favorite Independent Grocers in Seven States; New Bill Would Allow CBD to Be Marketed as Dietary Supplement; More**

**Customers Name Seven NCG Co-ops as their States' Top Independent Grocers**

Using data from Yelp and Google Trends, market research firm 24/7 Tempo recently [released](#) a ranking of top supermarkets and grocery stores in each state. In seven U.S. states, customers ranked retail food co-ops, all members of the National CO+OP Grocers Association (NCG), as their favorite independent grocery stores, reports the National Cooperative Business Association (NCBA). "Unlike corporate grocery chains, food co-ops are totally independent and owned by the community members who shop there. Instead of focusing on investors, food co-ops focus on providing fresh, healthy food for shoppers, creating sustainable jobs for employees, building a strong regional food system for everyone, and giving back to their community," said C.E. Pugh, CEO of NCG, told NCBA. "It's no surprise that so many shoppers appreciate the value of their community-owned food co-op, but few industries are as competitive as the grocery business, so that makes us especially proud of our member co-ops achieving these hard-earned rankings. It's a true testament to our co-ops working diligently to serve their members and communities, and toward the day when everyone has the fresh, healthy food they deserve," she added. Customers voted the following seven retail food co-ops as their favorite independent grocery store.

Alaska: [Co-op Market Grocery & Deli](#), Fairbanks

Maine: [Portland Food Co-op](#), Portland

Nevada: [Great Basin Community Food Co-op](#), Reno

New Mexico: [Mountain View Market](#), Las Cruces

North Carolina: [Tidal Creek Cooperative Food Market](#), Wilmington

Tennessee: [Three Rivers Market](#), Knoxville

Vermont: [City Market](#)/Onion River Co-op, Burlington



**Plant-based Foods Are Hot, Getting Hotter**

The growth of plant-based foods will continue to skyrocket into the new decade, resulting in a continued decline in traditional meat and dairy products, reports [Forbes Magazine](#). The article cites SPINS data commissioned by The Good Food Institute showing that retail sales of plant-based foods in the U.S. increased 31% over the two-year period ending July 2019 to reach nearly \$4.5 billion. According to Forbes, plant-based milk is driving the category with total dollar sales of \$1.86 billion in April 2019; plant-based meat alternatives totaled \$801 million, followed by ready to drink beverages at \$103 million. According to Forbes, investment bank UBS predicts that U.S. sales of plant-based protein and meat alternatives will grow from \$4.6 billion in 2018 to \$85 billion in 2030, and sales of plant-based dairy alternatives could reach \$27.5 billion by 2025. Forbes noted that U.S. chocolate company Hershey recently launched two plant-based jerky varieties under the Krave brand, a meat snacks company it acquired for \$200 million in 2015.

**Clif Bar Invests in University of California's First Organic Research Institute**

With a \$1 million endowment from Clif Bar & Company and University of California (UC) President Janet Napolitano, the university will establish the system's first-ever institute for organic research and education. The California Organic Institute will accelerate the development and adoption of tools and practices for organic farmers and those transitioning to organic by building on the capabilities of the UC Department of Agriculture & Natural Resources' (UC ANR) Cooperative Extension and Sustainable Agriculture Research and Education Program, the university said in a [release](#). "California's organic farmers already benefit from UC ANR's pest management, irrigation and crop production research, and this partnership with Clif Bar will give UC more capacity to focus on challenges specific to organic farming," said Glenda Humiston, UC vice president of agriculture and natural resources in the release. "The California Organic Institute will serve many of the organic producers we depend on for ingredients like almonds and figs, as well as farmers outside our supply chain," added Lynn Ineson, VP of Sustainable Sourcing for Clif Bar. "We recognize that the future of our food company depends on the ecological and economic success of organic and transitioning farmers." According to UC ANR, California has the most organic farms in the U.S., with 3,000 certified organic farms in the state representing 21% of all certified organic acreage in the U.S.

**New Bill Would Require FDA to Allow Marketing of CBD in Dietary Supplements**

A [bill](#) introduced in the U.S. House of Representatives would allow hemp-derived CBD to be marketed in dietary supplements and food products. Introduced by [Collin Peterson](#) (D-MN), Chair of the House Agriculture Committee, the bill would explicitly include hemp-derived CBD in the definition of a dietary supplement, reports [New Hope Network](#). The bill is important, reports [Marijuana Moment](#), because, while hemp and its derivatives were federally legalized under the 2018 Farm Bill, according to former FDA Commissioner Scott Gottlieb, it could take years for the FDA to finalize rules around allowing hemp-derived cannabidiol (CBD) in dietary supplements and food products—unless Congress steps in, he said. The legislation, filed on January 14, 2020, if passed would amend the Federal Food, Drug and Cosmetics Act to include CBD in the definition of dietary supplements. "The last two Farm Bills were landmark successes for hemp, but we are still very early in this process, and growers need regulatory certainty. This bill will allow FDA to regulate CBD that comes from hemp as a dietary supplement, providing a pathway forward for hemp-derived products. It would also identify barriers to success for hemp farmers, informing growers and policy makers of the challenges facing this new industry," said Congressman Peterson in a [statement](#). Learn more about current FDA, USDA, and state-level hemp and CBD policy and regulation at the upcoming Seventh Annual [NoCo Hemp Expo](#), the world's largest exposition, conference and gathering of hemp industry professionals, March 26<sup>th</sup> to 28<sup>th</sup>, 2020, at the National Western Complex in Denver, Colorado.

**Mass Market Sales of Hemp-derived CBD Predicted to Rise Significantly**

Look out, specialty CBD retailers, the mass market is coming on. According to a survey conducted by [Nutrition Business Journal](#), CBD supplements and beauty products are now sold in more channels than perhaps any other product in "the history of human commerce," including natural food stores, pharmacies, supermarkets, doctor's offices, coffee shops, bookstores, boutiques, fitness clubs, smoke shops, dispensaries, convenience stores and gas stations. Consumer awareness of CBD increased from 47% in 2018 to 70% in 2019, according to NBJ's survey, and product sales continue to grow at a rapid pace. "The largest shift between 2018 and 2020 is projected to happen in mass market retail, increasing from under 1% of the market in 2018 to almost a quarter of sales in 2020," says NBJ, which attributes much of that growth to the sales of topical hemp-derived CBD products. However, NBJ predicts that mass market channels will continue to see success in CBD sales as more stores offer dietary supplement product options. NBJ estimates that sales of hemp-based CBD products will reach \$4 billion by 2023.

## Food News, Policy and Research Update – By Steven Hoffman, Compass Natural Marketing cont'd

### European Researchers Concerned About High Levels of Glyphosate in Foods

"The toxic pesticide glyphosate should not be in the food chain," researcher Thomas Bohn of the Institute of Marine Research in Tromsø, Norway, told [FoodNavigator](#) in January 2020. His concern, along with that of other researchers in Norway and the U.K., is that glyphosate is the most widely used pesticide in the world due to its use on GMO soybeans, resulting, he says in higher levels of glyphosate residues in plants and food products. According to research published in [Foods](#) in late 2019, farmers in Argentina and Brazil from 1996 to 2014 have increased application of glyphosate in their fields "more than twice as high as the recommended doses used in most field trials." Also, reports [FoodNavigator](#), research has shown that late-season spraying of glyphosate – used as a desiccant and harvest aid in GMO and non-GMO soybeans – increases glyphosate residues in harvested soybeans by a factor of 10 or more. "These factors increase adsorption of the herbicide and augment residue levels in the harvested beans," the researchers wrote. According to Bohn, the current risk assessment system only received data from field trials with soybeans that were sprayed with "much lower" doses compared to "contemporary commercial farms," reports [FoodNavigator](#). "All possible measures should be taken to reduce consumption of glyphosate, like avoidance of desiccation, reduced used by farmers, etc. Glyphosate should not be in the food chain," Bohn told FoodNavigator. According to a [CNN report](#), glyphosate increased the cancer risk of those exposed to it by 41%, according to a peer-reviewed [study](#) published in 2019.

### Patagonia Takes Lead in Focus on Regenerative Agriculture, Climate Change

"We're losing the planet. We really are," Patagonia's founder Yvon Chouinard recently [told](#) Emily Stiffler Wolfe, a reporter at Explore Big Sky. "And I'm not going to let it go without fighting, so we have to try harder." Patagonia in 2012 launched its Provisions division that sells organic grains, responsibly caught salmon and other items to help create a market for climate-friendly products. In 2018, it became a charter member of the [Regenerative Organic Alliance](#), and in 2020 the company is introducing its [Road to Regenerative](#) line of organic cotton clothing. Made of "100% Regenerative Organic Certification Pilot Cotton from farms working to rehabilitate soil, respect animal welfare and improve the lives of farmers" the new tee shirts also are Fair Trade Certified sewn, says the company. Patagonia, with a new mission statement, "We're in business to save our home planet," intends to go "carbon neutral and non-extractive by 2025," reports Explore Big Sky, and it plans to boost support for environmental conservation and go deeper into politics. The company in December 2017 [sued](#) the Trump administration for rescinding a million acres of Utah's Bears Ears National Monument, and it backed Montana's Democratic Senator Jon Tester – an organic farmer – in his 2018 reelection. To learn more about regenerative organic agriculture and food and climate, attend [Climate Day](#) at [Natural Products Expo West](#), Tuesday, March 5<sup>th</sup>, 2020, and an update from the [Regenerative Organic Alliance](#) at Expo West on Friday, March 8<sup>th</sup>.



*Steven Hoffman, is Managing Director of Compass Natural, dedicated to providing brand marketing, public relations, social media, and strategic business development services to natural, organic and sustainable products businesses. A former agricultural extension agent and also former Editorial Director of New Hope Network's natural products trade magazine and trade show division, Hoffman brings 30+ years of communications, sales and brand marketing expertise to his clientele. Contact [steve@compassnaturalmarketing.com](mailto:steve@compassnaturalmarketing.com).*



# COMPASS NATURAL

## Expo West 2020

Early Bird Registration + Super Pass Upgrade – Early bird pricing won't last forever! Don't just attend Expo West, participate and learn with the [Super Pass Upgrade](#); Your All-Access Pass to Anaheim!

- Learn about the most cutting-edge trends shaping our industry. The Super Pass is your ticket to the industry's best educational content! Attend all educational sessions for one flat rate.
- Take advantage of a dedicated kiosk for badge pick up – skip the long lines and get on the show floor faster!
- Access the Super Pass Lounge with free Wi-Fi, bag check, concierge service, and charging stations
- Receive free drink tickets for evening events

Natural Products Expo West is an annual event you can't miss! [Register today](#) and take advantage of the lowest rates on Exhibit Hall passes and Super Pass upgrades. Early bird pricing is in effect until January 31<sup>st</sup>, 2020.

Hemp and CBD Events and Sessions – Industry interest and popularity in Hemp and CBD isn't going anywhere soon. There will be several events and education sessions surrounding this topic at Expo West, including a brand-new event: Hemp Expert Panel and Consultations. This event features industry leaders with expertise in areas such as legal, testing, and extraction, you'll leave this session with the information and resources you need to support your business in 2020 and beyond.

Hemp Expert Panel and Consultations will be held Wednesday, March 4 in the Sheraton, Plaza D and this event is included in your Exhibit Hall Pass. For more information on this event and other Hemp and CBD sessions, [click here](#). Sponsored by: Norse Technology and Venable LLP.

## Expo West

Climate Day at Expo West – Concerned about climate change but not sure what your company can do? Already taking action and seeking to make new commitments and a larger impact? Join industry leaders at Climate Day for inspirational keynotes, breakout sessions, networking, awards, a community resource fair and a rockin' reception! Find the tools, information and community you need to help your company take meaningful action to reverse global warming.

Climate Day will be on Tuesday, March 3<sup>rd</sup> in the Marriott. For more information on this event and other climate focused events, [click here](#). Sponsored by Seventh Generation.

Friday Keynote: Kimbal Musk Join us for our Friday Keynote featuring Kimbal Musk! Kimbal Musk is a chef, restaurateur and philanthropist. He is the Co-Founder and Chairman of three real food companies that are rapidly scaling across the U.S. The Kitchen Restaurant Group serves real food at every price point, and sources food from American farmers, stimulating the local farm economy to the tune of millions of dollars a year. His non-profit organization, Big Green, builds permanent outdoor Learning Garden classrooms in hundreds of underserved schools across America, reaching more than 350,000 students every day. And his tech-enabled urban farming company, Square Roots, grows hyper-local real food – year-round – while empowering the next generation of farmers.

For more information on this event and other keynotes, [click here](#).

## NCG Panel Discussion and Reception



# Presence Marketing Presents "Plastic Free By 2033" NCG Panel Discussion and Reception



- Date: Thursday, March 5<sup>th</sup>
- Place: Hilton Anaheim - 777 Convention Way - Anaheim, California
- Accommodations: Panel Discussion and Reception - Avalon Ballroom A & B
- Panel Discussion: 4:30 PM to 6:15 PM
- Reception: 6:15 PM to 7:00 PM
- Moderator: Chris McGurrin - Manager, Influencer Programs - New Hope Network
- Hosts: Heidi Traore - Business Development Manager - NCG  
Milton Zimmerman - Executive Vice President - Presence Marketing



Alyssa Harding  
Executive Director  
Sustainable Food Trade  
Association



Patrick Keenan  
R&D Packaging Engineer  
Annie's



Jessica Hayes  
Global Sourcing Manager  
Rebbl



Antoine Ambert  
Senior Director of  
Innovation & Sustainability  
Alter Eco



Please RSVP to Presence Marketing/Dynamic Presence's Alana Engler at [aengler@pmidpi.com](mailto:aengler@pmidpi.com).

## 2020 Winter Fancy Food Show Recap

The Winter Fancy Food Show is the largest specialty food trade events on the West Coast. The show brings specialty food's top manufacturers and retailers together for this unforgettable event.

The 2020 Winter Show featured more than 80,000 specialty products and included 1,400 exhibitors with 25,000 industry professionals. The 45<sup>th</sup> annual Winter Fancy Food Show was a huge success!

The 66<sup>th</sup> annual 2020 Summer Fancy Food Show is set to take place June 28<sup>th</sup> to 30<sup>th</sup>, 2020 in the Javits Center, New York. For more information regarding this upcoming show, please visit their website at [www.specialtyfood.com/shows-events/summer-fancy-food-show/](http://www.specialtyfood.com/shows-events/summer-fancy-food-show/) or reach out to Presence Marketing/Dynamic Presence's Tradeshow and Events Coordinator Kailyn Welch at [kwelch@pmidpi.com](mailto:kwelch@pmidpi.com).

## Fancy Food Show





## The Presence Marketing/Dynamic Presence – Northwest Team Offers a Helping Hand

On November 22<sup>nd</sup>, 2019, three members of the Presence Marketing/Dynamic Presence – Northwest team volunteered at the Women and Children Restaurant in Spokane, Washington. Volunteers included Anthony Hughes, Jay Jolliff and Kelly Vilar, who packed cookies for the location to sell to businesses who support their efforts. As Kelly continued in the kitchen preparing food for the holidays, Anthony and Jay jumped in to cleaning detail, washing dishes and pans.

The Women and Children Restaurant began in 1988 by serving 15 to 20 meals per week to women and children in need of a healthy meal. Now, the organization has not only six full-time and two part-time employees, but an additional volunteer board of directors. They average approximately 150 volunteers per week, consisting of 18 volunteer positions in total. Since 2018, the total annual average of meals served was 81,000, or 1,400 meals per week. Meals are served Tuesdays and Wednesdays from 3:00 P.M. to 5:45 P.M. and Fridays between 11:30 A.M. and 1:15 P.M.

The restaurant currently partners with 19 other organizations with nutrition-based outreach programs and deliver over 20,000 meals annually to other community agencies offering services to vulnerable citizens.



# Milestones

## Saying Goodbye to Eva Mailhott

Eva Mailhott has announced her retirement and her last day will be January 31<sup>st</sup>, 2020. She has been working in the Natural broker business for 16 years, the last 12 of which have been with Presence on the Retail Services Team on the East coast.

Anyone who has ever worked with her will tell you that there is nobody more knowledgeable about all aspects of merchandising in the natural world, NBC and grocery. She is the hardest and most conscience worker ever, bar none. A true team player throughout her career, she has always made sure everyone in her region was well taken care of and many times, a chain would request her by name, especially while opening a store.

During her retirement, Eva plans to be a snowbird spending the winters in Florida with her husband Mac. She also plans to spend more time with her grandchildren.

Thank you for all of your years of service and dedication to our business and Presence Marketing/Dynamic Presence, Eva. We are so excited for your next chapter.



## Bon Voyage to Susan Dick

For the past 38 years, Susan Dick has been in the retail/food industry, and has been an integral part of Presence Marketing/Dynamic Presence's – Northwest team for the past 12 years.

With a heavy heart, she retired on December 31<sup>st</sup>, 2019. She held numerous roles in her career, including Store Manager, Sales Manager, Business Manager, Brand Manager and Account Executive. Susan is looking forward to traveling with her husband Dave, exploring exotic destinations thanks to the luxury of time that retirement provides.



## New Arrivals

We are thrilled to announce that on Wednesday, January 8<sup>th</sup> our beloved Sharon Kutella has taken on a new role – Grandma!

Her daughter and son-in-law welcomed Aidan Orion Boyd to the world weighing 8 lbs. 3 oz. and was 21 inches long at birth. Congrats Sharon!



**Aidan Orion Boyd**

We are pleased to announce that Presence Marketing – Northwest Retail Services Representative Taryn Jones, welcomed is Henry McLean Jones on January 14<sup>th</sup>. Both mom and baby are happy and healthy. Congratulations to Taryn and her family!



**Henry McLean Jones**

## Just Married

A big congratulations to our very own National Brand Manager, Cristela Saravia-Brown and William Fowler who got married on November 30<sup>th</sup>, 2019. Will and Cristela blended their families in an intimate ceremony in Studio City, California surrounded by their five boys, friends and family. We wish them a lifetime of happiness and love!



## New Hires

### Presence Marketing

#### Midwest

Kristen Spatafora

Distributor Account Executive

#### Rocky Mountain

Jessica Skaaren

Marketing and Promotions Coordinator

### Dynamic Presence

#### Midwest

Lucas Follett

Sales Representative

Rhiannon Blahnik

Sales Representative

#### West

Kat Matutina

Account Executive

**welcome!**

## January Anniversaries

Bill Weiland	Presence Marketing - National	30 Years
Christine Tzumas	Presence Marketing - National	30 Years
Craig Stevens	Presence Marketing - Midwest	21 Years
June Grill	Presence Marketing - Northwest	15 Years
Charlie Bobb	Dynamic Presence - Northwest	12 Years
Dave Jensen	Dynamic Presence - Midwest	12 Years
Tara Whited	Dynamic Presence - Northwest	12 Years
Elyse Spagnola	Presence Marketing - East	12 Years
Dana Levin	Dynamic Presence - West	12 Years
Kelly Vilar	Presence Marketing - Northwest	12 Years
Kathy Mattisz	Presence Marketing - National	12 Years
Don Scheiwe	Presence Marketing - East	12 Years
Jackson Lind	Presence Marketing - Midwest	11 Years
Jim Spoto	Presence Marketing - Rocky Mountain	11 Years
Curtis Thompson	Dynamic Presence - East	9 Years
Christen Heller	Presence Marketing - National	9 Years
Chrissy Fiedorowicz	Presence Marketing - National	8 Years
Michael Bendos	Dynamic Presence - West	8 Years
Tom Tevepough	Presence Marketing - East	7 Years
Linda Silva	Dynamic Presence - East	7 Years
Bonnie Hyatt	Dynamic Presence - Northwest	7 Years
Yesi Morales	Presence Marketing - Midwest	7 Years
Lynn Lesniewski	Presence Marketing - National	7 Years
Sarah Sturgis	Presence Marketing - National	6 Years
Kailyn Welch	Presence Marketing - National	6 Years
Ben Grill	Dynamic Presence - West	5 Years
Ellen Artzt	Dynamic Presence - Southwest	5 Years
Drew Harris	Presence Marketing - National	5 Years
Brian Hinton	Presence Marketing - National	5 Years
Tonja Otey	Presence Marketing - Northwest	5 Years
Aimee Aylor	Dynamic Presence - Southwest	4 Years
Dave Matney	Dynamic Presence - Midwest	4 Years
Bill Wilson	Dynamic Presence - Southwest	4 Years
Chris Massey	Dynamic Presence - East	4 Years
Kathy Clarke	Presence Marketing - West	4 Years
Greg Lesch	Dynamic Presence - Midwest	4 Years
Jackie Klukowski	Dynamic Presence - East	2 Years
Clayson Lobb	Presence Marketing - National	1 Year
Gabriela Fox	Dynamic Presence - Rocky Mountain	1 Year

## Help Wanted

### Job Openings

#### Location

East  
East  
Midwest  
Midwest  
Northwest  
West

#### Department

Sales  
Sales  
Management  
Management  
Sales  
Sales

#### Job Title

Account Executive  
Retail Services Representative  
Director of Brand Management  
National Brand Manager  
Sales Representative  
Sales Merchandiser

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 & Gabriela Fox
- ◆ Rocky Mountains – Kayla Wigle ◆ West – Shannon Armstrong
- ◆ Distributor News – Pete Psaledas ◆ Data/SPINS – Jerry Strooboscher

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