

Grocery Market Insights

OVERVIEW & KEY TAKEAWAYS

- The Los Angeles-Long Beach-Anaheim, CA, MSA is associated with so many superlatives. Although it is comprised of only two counties, Los Angeles and Orange, it is the second largest metro area in the nation, behind only New York. The City of Los Angeles itself is home to about 3.9 million residents, followed by Long Beach, Anaheim, Santa Ana, and Irvine, each with more than 300,000.
- The metro has experienced its share of high-visibility travails. Natural disasters such as wildfires and drought, economic headwinds caused by shifts in entertainment spending, and extremely high cost of living have led to some population decline in recent years, placing the MSA among the top 25 in percent decline, but among the top two in terms of population count lost. Nevertheless, we do anticipate the next 5 years to show positive population growth, at about 1.7%.
- The LA MSA trails only New York in terms of GDP, and if it were a sovereign country, it would easily be among the 20 largest in the world. The two metros are the only metropolitan areas in the US with a GDP over \$1 trillion.[1] Entertainment and tourism are the best known of the economic drivers for the region, but the region also has maintained a very strong manufacturing base and has healthy contributions from professional management services, health services, and international trade.
- The grocery sector serving such a populous region is by necessity vast. RetailStat tracks more than 1,300 individual stores. This trails only the 2,100 that we track for the NY metro. With the sector shared by so many operators, there is no dominant player. Costco is the surprising leader, as the only banner with double digit market share. If we combine Kroger's Ralphs and Food 4 Less, it would also have double digit market share at 13%. Albertsons/Safeway banners combine for 9.8% of the market share, through its Vons, Albertsons, Pavillions, and Bristol Farms banners. Trader Joe's is another surprise, with its 7% market share surpassing several other typically high performing chains, like Walmart.
- The market's demographic diversity is mirrored in the grocery sector. In addition to the array of Conventional, Quality/Service, and Club operators, there are very successful grocers like Vallarta Supermarkets and NorthGate Gonzalez that serve the dynamic Hispanic community, and others like 99 Ranch Market and H Mart that serve the influential Asian community. Both communities are among the largest found in the US.
- We have tracked very little upcoming new grocery stores planned in the region. This is likely due to current grocery saturation levels and the combination of real estate costs along with economic uncertainty. Having said that, Trader Joe's has recently opened three new stores, and we've tracked some growth by other well-known chains as well. There will always be opportunity in a metro this large, with so much capacity and money.

CHAIN MARKET COMPARISON

Current (2025) Market Sales & Future Market Banner Growth

Chain Name	Number of Stores	Total		Average			Total Annual Volume	Market Share	No. of Planned Stores	Added Sales Area	Chain Percent SF Change	Projected Number of Stores	Projected Sales Area
		Volume Weekly	Sales Area	Volume Weekly	Sales Area	S/Sq Ft							
Costco	35						\$6,747,000,000	13.28%					
Ralphs	122						\$4,685,460,000	9.22%					
Trader Joe's	84						\$3,565,484,000	7.02%					
Other	148						\$2,320,760,000	4.57%					
Walmart SC	43						\$2,319,720,000	4.57%					
Vons	73						\$2,209,844,000	4.35%					
Food4Less	51						\$1,931,280,000	3.80%					
Smart & Final	92						\$1,691,300,000	3.33%					
Target	124						\$1,620,060,000	3.19%					
Albertsons	46						\$1,464,580,000	2.88%					
Whole Foods	31						\$1,431,560,000	2.82%					
Superior Grocers	53						\$1,426,360,000	2.81%					
Stater Bros	48						\$1,268,800,000	2.50%					
El Super	35						\$1,050,400,000	2.07%					
Pavillions	25						\$1,025,960,000	2.02%					
Northgate Gonzalez Market	28						\$1,005,680,000	1.98%					
Sprouts	26						\$1,004,120,000	1.98%					
Vallarta Supermarkets	49						\$920,660,000	1.81%					
Sam's Club	9						\$650,780,000	1.28%					
Geison's	19						\$630,500,000	1.24%					
Aldi	38						\$464,620,000	0.91%					
Walmart NM	14						\$430,300,000	0.85%					
Super King Markets	8						\$318,500,000	0.63%					
99 Ranch Market	15						\$312,780,000	0.62%					
Jons Marketplace	12						\$301,860,000	0.59%					
Grocery Outlet	42						\$301,340,000	0.59%					
H Mart	12						\$282,880,000	0.56%					
Erewhon Market	10						\$262,600,000	0.52%					
Amazon Fresh	14						\$259,740,000	0.51%					
Bristol Farms	9						\$256,620,000	0.51%					
WinCo	3						\$183,040,000	0.36%					
Seafood City	9						\$159,640,000	0.31%					
GW Supermarket	6						\$148,460,000	0.29%					
Super A Foods	7						\$123,240,000	0.24%					
Big Saver Foods	8						\$120,120,000	0.24%					
Mother's Market	9						\$119,340,000	0.23%					
Totals	1,357	\$827,219,000	34,708,200	\$609,594	25,577	\$23.83	\$43,015,388,000	84.66%	18	0	0.00%	9	89,400

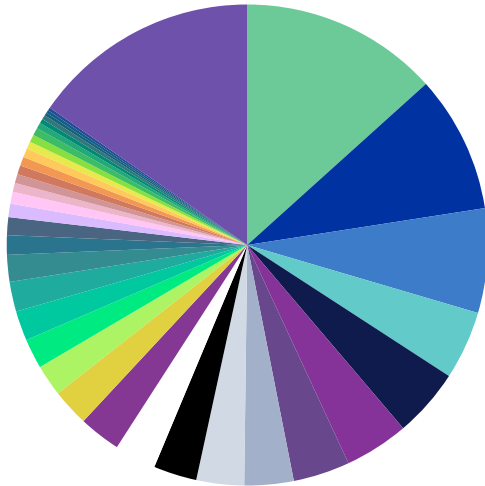
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detailed sales volumes.

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Note: All numbers reflect Food Group data only, and are as of 2025. Market share totals exclude leakage. Future store openings include rumored, planned, and proposed stores that are being monitored
[1] Source: "Real Gross Domestic Product (GDP) (Thousands of chained 2017 dollars)." Bureau of Economic Analysis 2023 data, 2024.

CURRENT MARKET SHARE & EXPECTED GROWTH

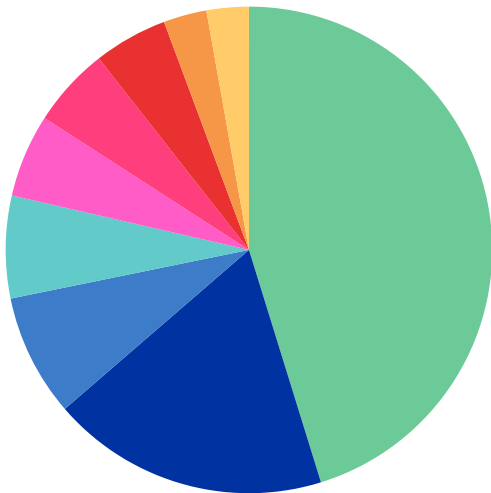
Share of Supermarket Sales, Current (2025)



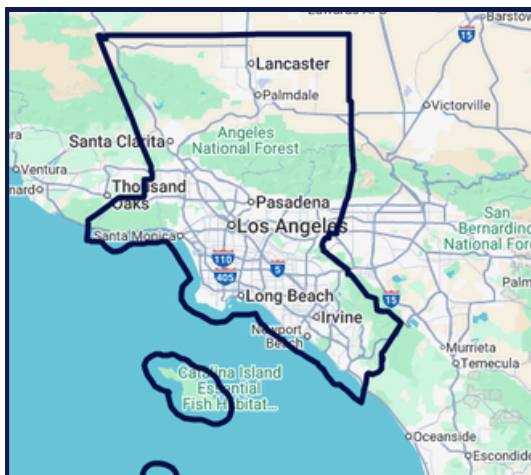
Banner	Market Share
Costco	13.3%
Ralphs	9.2%
Trader Joe's	7.0%
Other	4.6%
Walmart SC	4.6%
Vons	4.3%
Food4Less	3.8%
Smart & Final	3.3%
Target	3.2%
Albertsons	2.9%
Whole Foods	2.8%
Superior Grocers	2.8%
Stater Bros	2.5%
El Super	2.1%
Pavilions	2.0%
Northgate Gonzalez Market	2.0%
Sprouts	2.0%
Vallarta Supermarkets	1.8%

Banner	Market Share
Sam's Club	1.3%
Gelson's	1.2%
Aldi	0.9%
Walmart NM	0.8%
Super King Markets	0.6%
99 Ranch Market	0.6%
Jons Marketplace	0.6%
Grocery Outlet	0.6%
H Mart	0.6%
Erewhon Market	0.5%
Amazon Fresh	0.5%
Bristol Farms	0.5%
WinCo	0.4%
Seafood City	0.3%
GW Supermarket	0.3%
Super A Foods	0.2%
Big Saver Foods	0.2%
Mother's Market	0.2%
[Leakage]	15.3%

Growing Banners, by Sales Area



Banner
Other
Costco
Sprouts
Ralphs
Vallarta Supermarkets
Northgate Gonzalez Market
Erewhon Market
Aldi
Grocery Outlet



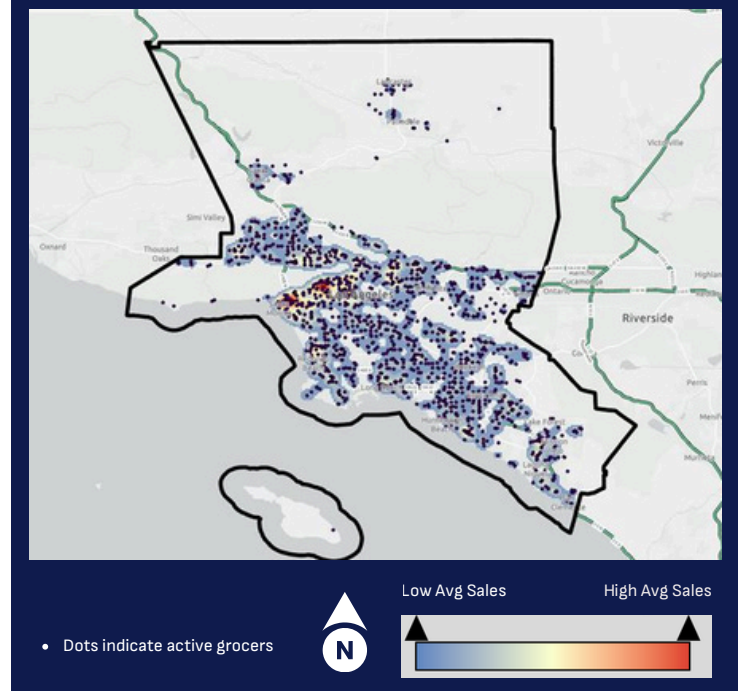
Los Angeles, CA, Metro Key Demographics

- Total Population: 13,204,533
- Projected Pop Growth (5yr): 1.7%
- Total Households: 4,498,235
- Median HH Income: \$108,331
- Average HH Income: \$144,871
- Bachelor's or Higher: 37.2%
- Total Number of Grocery Stores in Market (2025): 1,357
- Total Number of Projected Grocery Stores (2030): 1,375
- Major Grocer Weekly Sales in Market (2025): \$827.2M

Areas of High-Performing Grocers

- The large number of grocers in the LA market overall, and the very high density of grocers in the communities near central LA, result in performance markers that spike really high in only two areas, washing out most of the rest of the metro by comparison.
- The only two true hotspot areas in the metro are Santa Monica to the west and Beverly Hills and West Hollywood closer in. Both of these communities are very affluent, and the banners here reflect that. There is a large number of Whole Foods locations and Trader Joe's stores. Gelson's, Pavilions, Erewon Market, and Ralph's are also among the many banners represented here. Perhaps surprisingly, Costco is not located in either of the two hotspot regions.
- Areas of above-average performance can be found around the perimeter of these hotspots, notably in Redondo Beach, Pasadena, and the east-west corridor of Burbank to Sherman Oaks. Long Beach falls into this tier, as do a number of Orange County communities, although most are so compact that it is hard to discern at this level. Many of the same grocers noted above are represented here, including Costco.
- The remainder of the metro statistically shows as low performing by comparison, leading to the simple conclusion that there aren't many opportunities outside of the core of LA, and new entries will result in over-stored communities. However, at this high level, desirable trade areas are hidden. Communities like Mission Viejo may appear small and concentrated, but opportunities will likely become evident when the proper analysis is applied.

Areas with Concentrated High Performing Stores



Grocer Spotlight: Trader Joe's

Trader Joe's is a Southern California institution that has found success and a devoted customer base — some might say a fanbase — nationwide. This compact, quirky grocer originated in Pasadena, CA, and its original store, located at 610 S Arroyo Pkwy, is still in operation. It is known for its Pacific, Tiki-trader theme; unique, curated private label items; and friendly customer service. It is a grocer designed to supplement a household's pantry, rather than being the primary source of groceries for a household.

Trader Joe's was named after its founder, Joe Coulombe, who had operated a local chain of convenience stores known as Pronto Market. The initial store in Pasadena opened in 1967, and its success led to the expansion of the store to 19 locations in California by 1979. That year, the small, regional chain was bought by Aldi Nord, the separate entity from Aldi Sud, which owns the Aldi banner in the US. With the new ownership, the store eventually expanded into Northern California in the 1980s, then to Arizona in 1993, and subsequently to Seattle and Oregon in 1994. It made the leap to the Atlantic Seaboard in 1996, with stores in Boston, New York, and Washington, DC.[1] Today, the chain operates approximately 600 stores in 42 states, as well as the District of Columbia.

Approximately one-third of Trader Joe's stores can still be found in California. They continue to expand across the US, and their stores consistently lead the grocery sales per square foot category in every market. Since they are a specialty grocer and not a comprehensive grocery solution, they rarely appear at the top of the market share rankings for any metro. Yet, in L.A., they have a much larger store presence, and they have certainly been accepted as part of the culture. They have the third-highest share of the market (or fourth, if all Albertsons/Safeway banners are aggregated). Only here in SoCal is Trader Joe's more than just an adored retail stop; it's an actual power player.

Trader Joe's is often described as a Limited Assortment grocer, given that it provides a selection of about 4,000 SKUs, versus the 30,000 or so of a standard grocer, and 80% or more of those SKUs are private label. This definitely meets the definition of "limited assortment;" but Trader Joe's does not operate like other grocers in this category, such as its cousin, Aldi. In our analysis, we instead categorize Trader Joe's as a "Specialty" grocer and employ a unique, eponymously named format for the chain. No other grocer makes location decisions quite the same as Trader Joe's.

Trader Joe's has no loyalty programs, nor do they rely on sales or coupons. Their store environment is quirky, with a small footprint of about 14,000sf, and about 10,000sf of sales space.[2] They usually are found in more affluent areas, and are appreciated by epicurean customers, but they pride themselves in being a "neighborhood store" and do have affordable options that appeal to middle-class customers as well. It is commonly quipped that Trader Joe's prefers to locate near small, inconvenient parking, but this is merely a result of the small store footprint and its ubiquitous popularity.

Trader Joe's is in a steady growth mode. We don't have any future stores tracked for L.A., but three new locations have opened in the metro just this year. The grocer is known for keeping its plans close to the vest, so it is sometimes difficult to get a bead on definitive plans; but Trader Joe's is definitely active in growing its presence, particularly nationwide in metros where its footprint is small.

TRADER JOE'S

Quick Facts	
Headquarters	Monrovia, CA Essen, Germany
Established	1967
Ownership	Privately-owned
In the MSA:	
Date of Entry in Metro	1967
Number of Stores	83
Total Sales Area (sf)	
Average Sales/Wk	
Highest Store Sales/Wk	
Lowest Store Sales/Wk	
Market Share	6.9%
Format	Specialty: Trader Joe's