

WinCo Foods Economic Review

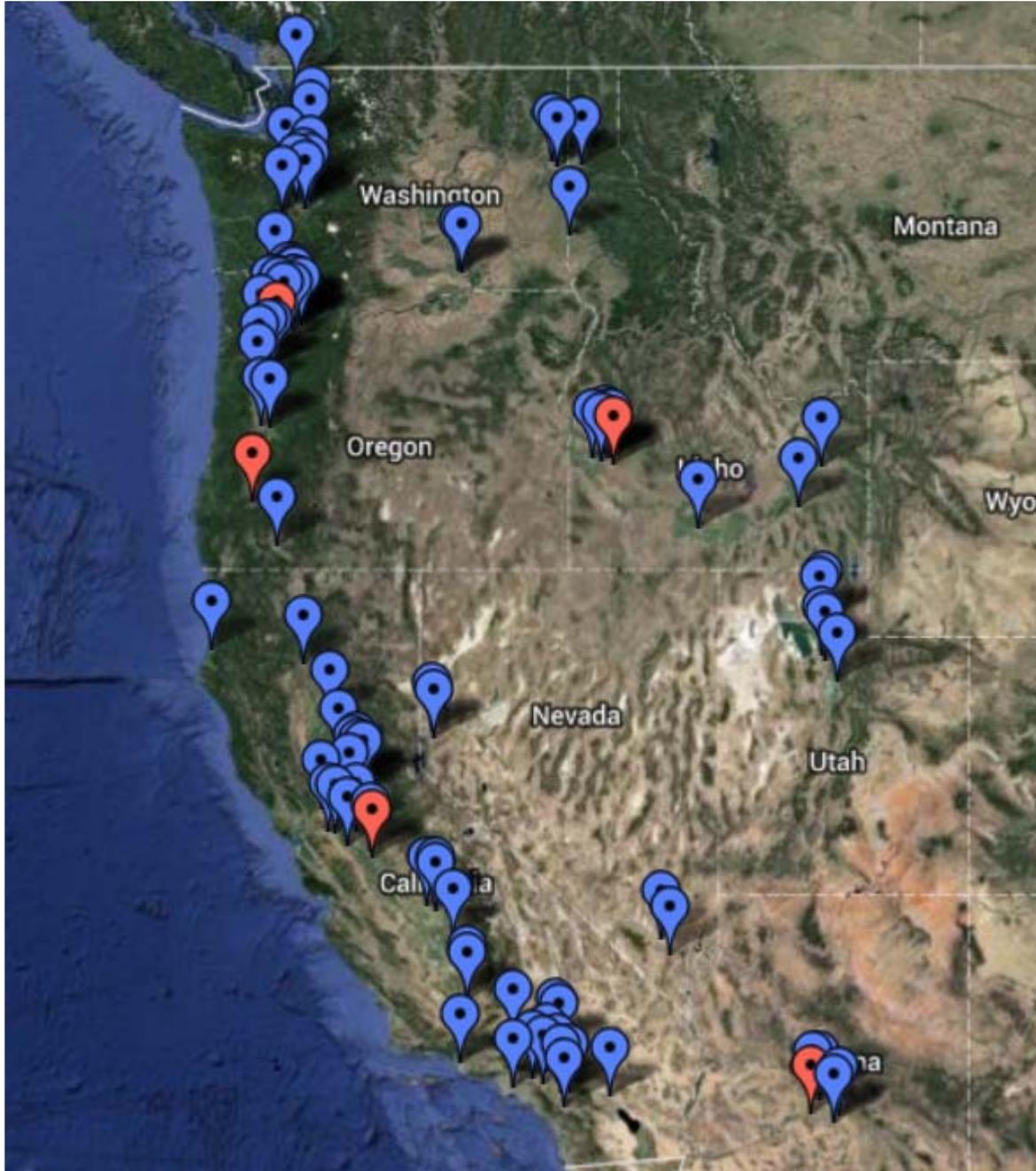
as prepared for the

Joint Legislative Economic Outlook and Revenue Assessment Committee

January 3, 2014

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The Employee Ownership 100: America's Largest Majority Employee-Owned Companies

August 2013

Companies must be at least 50% owned by an ESOP or other qualified plan or by one or more other kinds of plans in which at least 50% of full-time employees are eligible to participate. Employment includes all full- and part-time employees in the U.S. and worldwide.

<u>Company</u>	<u>City</u>	<u>State</u>	<u>Start Date</u>	<u>Business</u>	<u>Employees</u>
Publix Super Markets	Lakeland	FL	1974	Supermarkets	159,000
Hy-Vee	West Des Moines	IA	1994	Supermarkets	56,000
CH2M Hill	Englewood	CO	2005	Engineering & construction	30,000
Price Chopper	Schenectady	NY	1996	Supermarkets	23,000
Lifetouch	Eden Prairie	MN	1977	Photography	22,200
Daymon Worldwide	Stamford	CT	2001	Food distribution	22,000
Penmac	Springfield	MO	2010	Staffing	18,000
Houchens Industries	Bowling Green	KY	1961	Supermarkets & other services	16,000
WinCo Foods	Boise	ID	1985	Supermarkets	14,400
Alliance Holdings	Abington	PA	1995	Holding company	13,000



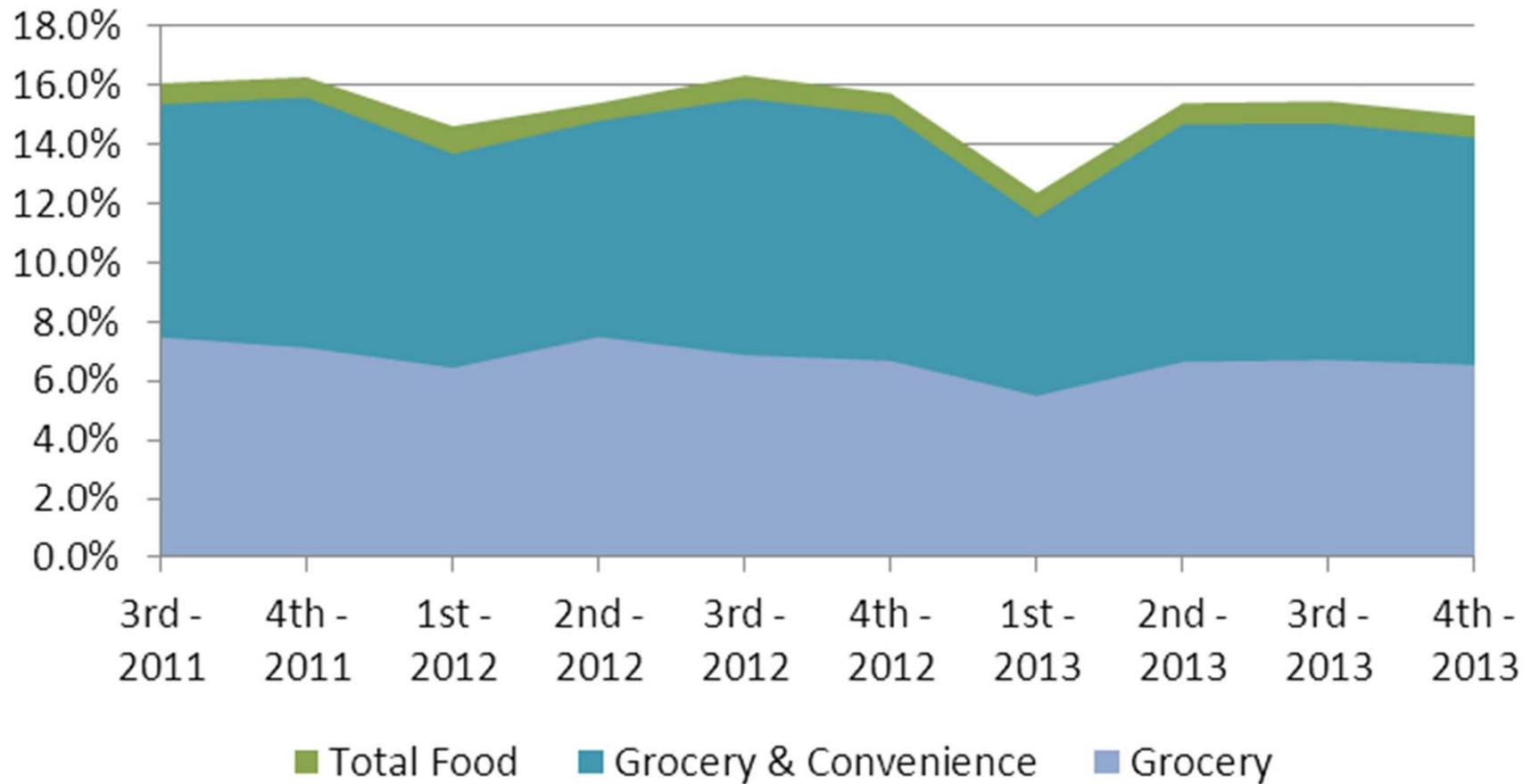
Top 75 Retailers & Wholesalers 2013

1. **Wal-Mart Stores**
2. **Kroger**
3. **Costco Wholesale Corp.**
4. **Target Corp.**
5. **Safeway**
6. **Supervalu**
7. **Loblaw Cos.**
8. **Publix**
9. **Ahold USA**
10. **7-Eleven**
11. **C&S Wholesale Grocers**
12. **Delhaize America**
13. **H-E-B**
14. **Sobeys**
15. **Dollar General Corp.**
16. **Meijer Inc.**
17. **Wakefern Food Corp.**
18. **Metro Inc.**
19. **Whole Foods Market**
20. **BJ's Wholesale Club**
21. **Trader Joe's Co.**
22. **Bi-Lo Holdings**
23. **Giant Eagle**
24. **Family Dollar Stores**
25. **Aldi**
26. **Hy-Vee Food Stores**
27. **Associated Wholesale Grocers**
28. **Wegmans Food Markets**
29. **A&P**
30. **WinCo Foods**

Source: Supermarket News, Top 75; <http://supermarketnews.com/top-75-retailers-wholesalers-2013>

Grocery Sales as a Percent of Idaho GDP

by Calendar Quarter



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An Employee Owned Company

INFORMATION SHEET

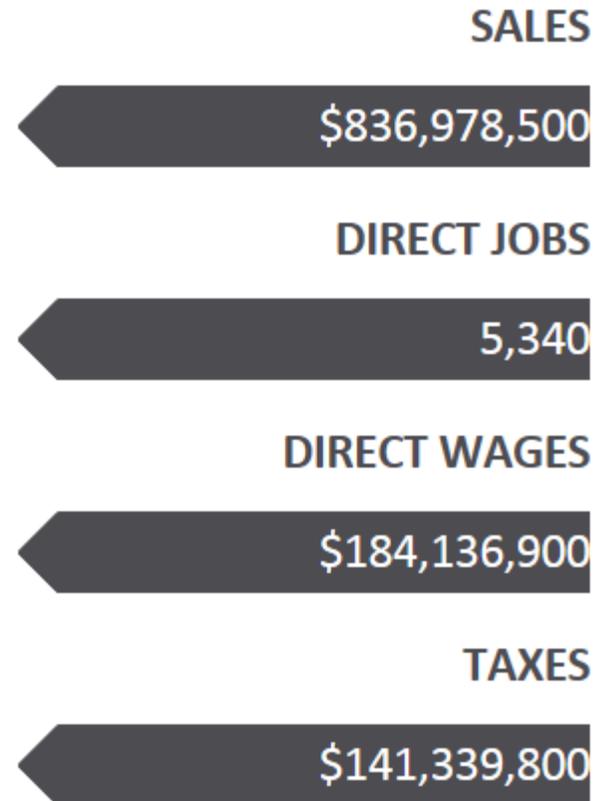
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IDAHO

Trailing Twelve Months Ending
June 28, 2013

Sales	\$576,426,000
Stores	9
Store Under Construction	1
Employees	1,795
Gross Wages	\$56,550,000
Payroll Employment Related Taxes	\$6,246,000
Sales & Use, B&O and Local Taxes	\$27,097,000
Real Property Taxes	\$2,107,000
Personal Property Taxes	\$552,000



INDEPENDENT GROCERS IMPACT IDAHO

Independent retail supermarkets and the wholesalers that supply them play a **vital role** in the communities they serve and are a major contributor to the economy of **Idaho**. Most are privately held, family-owned entrepreneurial businesses that are dedicated to their customers, associates and communities. Independents operate supermarkets of all formats and sizes that cater to a wide variety of consumer tastes providing options for shoppers who want to support home town and regional businesses.

The Economic Impact of Independent Grocers in Idaho

Sales	Jobs	Wages	Taxes
\$836.98 million	5,340	\$184.14 million	\$141.34 million

Jobs and Wages

In **Idaho**, independent grocers are responsible for creating **5,340 stable, reliable jobs** and over **\$184.14 million in wages** paid. When factoring in the ripple effect of goods and services purchased but not resold (equipment, technology, transportation, etc.), that **number of jobs jumps to 8,390** with **total wages of \$286.70 million**.

Taxes

In **Idaho**, independent supermarkets and the wholesalers that serve them are also a major source of tax revenue for Federal, state and local governments. All told the independent channel and their employees generate about **\$76.25 million in state and local tax and \$65.09 million in Federal taxes**. The combined total in State of Idaho is **\$141.34 million**.

Stores and Sales

In **Idaho**, the independent grocery channel includes **117 stores** and generates **\$836.98 million in annual sales**.

National Impact

Nationally, the independent grocery channel includes nearly **21,000 of the 36,000 US supermarkets**, and generates **\$131 billion in annual sales** representing nearly **25% of the total domestic market**.

Total Independent Stores
In United States:
21,000 (58% of total)

All Stores in
United States:
36,000

Table 1: Economic Impact of the Independent Grocers Industry
(in the United States)

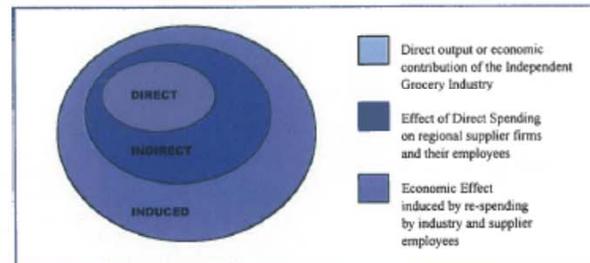
(\$ Millions)	Direct	Supplier	Induced	Total
Jobs	944,200	147,250	422,130	1,513,580
Wages	\$ 30,055.4	\$ 7,787.2	\$ 19,867.7	\$ 57,710.3
Output	\$ 58,445.9	\$ 22,712.0	\$ 60,982.3	\$ 142,140.2
Taxes				\$ 27,227.9

Economic Impact of the Independent Grocers Industry
(in Idaho)

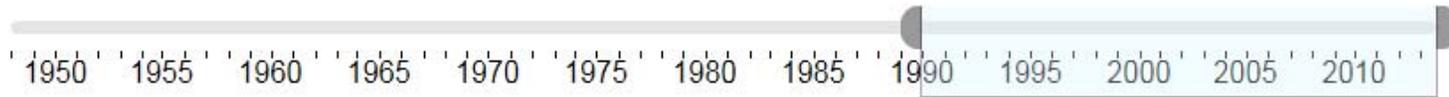
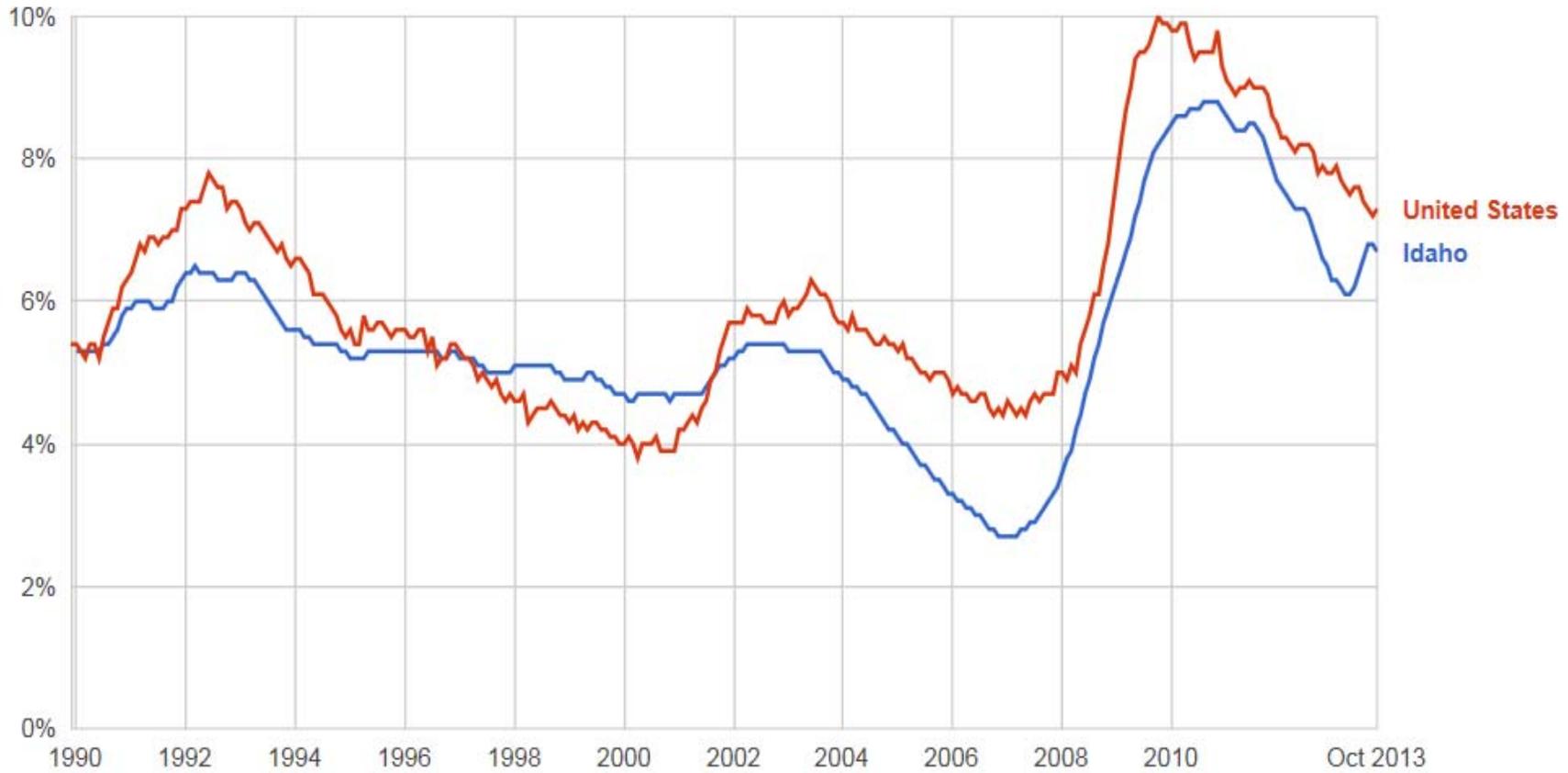
	Direct	Supplier	Induced	Total
Jobs	5,340	788	2,262	8,390
Wages	\$ 184.1	\$ 26.8	\$ 75.7	\$ 286.7
Output	\$ 837.0	\$ 325.2	\$ 873.3	2,036
Taxes				\$ 141.3

Economic Impact of the Independent Grocers Industry
(Ancillary Only in Idaho)

	Direct	Supplier	Induced	Total
Jobs		788	2,262	3,050
Wages		\$ 26.8	\$ 75.7	\$ 102.5
Output		\$ 325.2	\$ 873.3	1,199
Taxes		\$ -	\$ -	\$ -



Unemployment rate - Seasonally Adjusted ?



Data from [U.S. Bureau of Labor Statistics](#) Last updated: Nov 28, 2013

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THANK YOU

