

Red & White retail store to the present Super Duper supermarket chain of approximately 58 stores. Five years ago S.M. Flickinger Inc. was sold to Scrivner Inc. of Oklahoma which now services over 300 stores in this region in addition to the 54 Super Duper stores. Scrivner/Flickinger also owns separate warehousing facilities for its large food service division.

#### Wegmans Food Markets

Wegmans Food Markets, solely owned by Wegmans and headquartered in Rochester, operates 39 stores, 26 in Rochester, 9 in Syracuse and 4 in Buffalo. These units average 85,000 sq. ft. with larger facilities being planned for any new stores. This store has become the area's innovator of the one-stop shopping "super store". It offers a large selection of gourmet foods in its Old World Shop. It also features specialty meat, cheese and bakery departments, a salad bar and carry out café, as well as complete pharmacy, stationery and household sections.

#### Bells Markets

Bells is owned and operated by Peter J. Schmitt Company of Buffalo. P.J. Schmitt Co. maintains a major food distribution warehouse that supplies over 200 stores. This includes the 112 Bells supermarkets that are either franchised or corporate-owned.

#### Tops Friendly Markets

A Buffalo-based supermarket chain, Tops Friendly Markets, recently purchased by Ahold Company (Dutch), has 58 supermarket stores, one International Super Store, 49 Wilson Farms and 15 B-Kwik convenience stores in Western and Central New York. Over the past ten years the Tops stores have gone through a major upgrading from a typical grocery store to a full-service supermarket featuring a specialty seafood shop, a complete in-store bakery, salad and snack bars, cheese shop, full-service meat and sausage departments, gourmet and ethnic sections and a carry out café.

#### P & C Markets

The company which began in the 1940s as Producer & Consumers in Syracuse, New York, has grown over the years into one of the Syracuse area's leading food retailers and wholesalers. To date, P & C operates 90 corporate stores, 65 of them in Upstate New York. The remainder are scattered throughout Vermont, New Hampshire, Massachusetts and Pennsylvania. The P & C Syracuse warehouse services the corporate stores and the 66 Big M franchise stores, mostly located in Upstate New York. The company also serves as wholesaler to 220 stores with service run out of both the Syracuse and the White River, Vermont warehouse.

#### Victory/Great American Markets

Victory/Great American operates some 90 stores, mostly in small towns in Central and Northern New York State. These stores include 72 Great American stores, 11 Chicago Markets and 8 Victory stores. Most of the stores feature bakeries, delicatessens, bulk and specialty foods, cheese departments, snack bars, service meat sections and salad bars.

#### Quality Markets

Penn Traffic Company's Quality Markets division operates 15 stores in the area around Jamestown in western New York State. They are conventional stores ranging in size from 10,000 sq. ft. to 34,000 sq. ft. They are now full-line grocery stores with current emphasis on expanding their services to compete with the other chains in the area.

The top four food retail chains (Super Duper, Wegmans, Bells and Tops) account for approximately 90 percent of the food market in the Buffalo and Rochester area with P & C and Victory/Great American having a very strong hold in the Syracuse market.