The US Grocery Retail AI Visibility Index 2026

The top 25 US grocery retailers, ranked by AI citation share across ChatGPT, Claude, Perplexity, and Google AI Overviews.

By Ronn Torossian, Founder and Chairman, and the 5W Research Team

April 2026 · 5wpr.com/research/grocery-retail-ai-visibility-index-2026

EXECUTIVE SUMMARY

One retailer owns 23.6% of the US grocery market — and isn't winning the AI answer.

Walmart is the largest grocery retailer in the United States by every traditional measure: $276 billion in US grocery sales, 4,605 stores, 255 million customer visits per week. Yet when American shoppers ask ChatGPT, Claude, Perplexity, or Google AI Overviews where to buy their groceries, Walmart is not the retailer AI consistently surfaces first.

Costco is. Trader Joe's is. Whole Foods is. Aldi is. Even regional chains like H-E-B and Wegmans are capturing AI citation share that dwarfs what their physical footprint would predict. The gap between market share and AI visibility is the single most important structural shift happening in American grocery retail right now — and most grocery CMOs have not measured it.

Across more than 80 consumer-intent queries spanning price, quality, private label, fresh produce, organic, delivery, bulk, meal planning, and regional preference, 5W ranked the top 25 US grocery retailers by AI citation share. The findings will be uncomfortable for several category leaders. **5W built this report so grocery CMOs can stop guessing and start measuring.**

KEY FINDINGS

$864B
US at-home grocery market size in 2026

23.6%
Walmart's grocery market share — and the size of the AI citation gap

64%
AI citation share captured by the top 10 retailers

305K+
US grocery locations — and shrinking in AI visibility

80+
Consumer-intent queries tested across 12 sub-categories

4
AI platforms measured: ChatGPT, Claude, Perplexity, Google AI Overviews

25
US grocery retailers ranked by AI citation share

10th
Installment in the 5W AI Visibility Index series

THE TOP 10, RANKED BY AI CITATION SHARE

1. Costco (Warehouse)

Strongest sub-category: best overall value / bulk. Kirkland Signature is the single most-cited grocery private label in AI answers; warehouse model dominates 'bulk' and 'best value' queries.

2. Trader Joe's (Specialty)

Strongest sub-category: best private label / unique products. Cult following generates massive organic Reddit and blog coverage LLMs pull from; every 'best of' private label query surfaces TJ's.

3. Whole Foods Market (Premium)

Strongest sub-category: best organic / natural. Amazon-owned; organic authority baked into training data; strong citation across health and wellness queries.

4. Walmart (Supercenter)

Strongest sub-category: cheapest / most locations. Sheer market share forces citation but under-indexes AI visibility versus physical dominance — the single biggest gap in the category.

5. Kroger (Conventional)

Strongest sub-category: best for weekly shop. 2,750+ stores across banners; strong in Midwest/South AI citations; 'Simple Truth' and 'Private Selection' private labels increasingly cited.

6. Aldi (Discount)

Strongest sub-category: cheapest / best value. Discount authority + private-label-heavy model is perfectly optimized for AI price-comparison queries; 2,676 stores and growing fast.

7. H-E-B (Regional)

Strongest sub-category: best regional / Texas. #1 in dunnhumby Retailer Preference Index (5th time in 9 years); Texas-specific AI citation dominance.

8. Publix (Regional)

Strongest sub-category: best customer service. Southeast dominance; Pub Sub cultural moment; top-quartile customer satisfaction drives citation.

9. Wegmans (Premium Regional)

Strongest sub-category: best premium regional. Northeast cult following; 'best grocery store' queries consistently surface Wegmans despite limited geography.

10. Target (Mass Retail)

Strongest sub-category: best for meal planning. Good & Gather private label momentum; grocery now $27B+ segment; Gen Z AI-discovery darling.

Ranks 11–25 (Sprouts, Market Basket, Amazon Fresh, Sam's Club, Meijer, Hy-Vee, Winco, ShopRite, Safeway, Albertsons, Harris Teeter, Food Lion, BJ's, Stop & Shop, The Fresh Market) plus full sub-category breakdowns and rationale: continued in the next section.

THE SIX STRUCTURAL FINDINGS

1. Market share no longer predicts AI citation share.

Walmart's 23.6% market share translates into approximately 8–10% AI citation share across premium query categories. That decoupling is the single most important shift in the category.

2. Private label is the highest-leverage citation asset a grocer owns.

Kirkland, Trader Joe's, 365, Good & Gather, and Great Value are cited directly by name in AI answers at rates that exceed most national CPG brands. Private label investment is now GEO investment.

3. Regional loyalty translates directly into regional AI dominance.

H-E-B in Texas, Wegmans in the Northeast, Publix in the Southeast, Hy-Vee in Iowa: concentrated customer loyalty builds concentrated AI citation density. Regional chains outperform national chains in their home markets by 3x or more.

4. Recipe and meal-planning content is a hidden AI citation driver.

LLMs answer 'what should I cook for dinner' and 'where can I buy X' in the same conversational thread. Grocers with strong recipe and meal-planning content infrastructure earn citations in both query types simultaneously.

5. Reddit and TikTok are under-priced citation surfaces.

Perplexity pulls a majority of its answers from community surfaces. ChatGPT and Claude weight Reddit heavily. Grocery brands with organic community presence earn citation authority that paid marketing cannot replicate.

6. Fragmented banner portfolios dilute parent-company citation equity.

Ahold Delhaize, Albertsons Companies, and Kroger all face the same challenge: multi-banner strategies that confuse LLM brand attribution. Consolidation or clearer hero-banner positioning is now a GEO requirement.

SIX 2026 DYNAMICS RESHAPING THE CATEGORY

1. The GLP-1 grocery basket is a new citation battleground.

'What should I buy at the grocery store if I'm on Ozempic' is now a top-50 grocery query. Retailers with strong protein, portion-controlled, and GLP-1-compatible content are winning a brand-new citation pool.

2. Aldi's expansion is compounding its AI citation lead.

Every new Aldi opening generates local press coverage, community discussion, and structured trade-media coverage. The retailer's 2028 target of 3,200 stores is also a citation-compounding program whether Aldi intended it that way or not.

3. The private label arms race has entered its AI phase.

Good & Gather, Kirkland, 365, Simple Truth, and Great Value are investing in long-form branded content at unprecedented levels. The winners of this cycle will own the next decade of grocery AI citations.

4. The failed Kroger-Albertsons merger left competitive narratives intact — and regional chains benefited.

Regional independents expected the merger to consolidate competitive pressure. Its failure left the fragmented conventional-chain landscape intact, and regional chains have used the intervening 18 months to compound their AI citation moats.

5. Walmart's CEO transition is a narrative inflection point.

Doug McMillon's 2026 retirement and John Furner's succession creates a brand-narrative window that AI platforms are currently treating cautiously. The new CEO's communications strategy will directly shape Walmart's AI citation trajectory through 2028.

6. Inflation-driven value queries are rewriting the category's hierarchy.

'Cheapest groceries,' 'how to save money on groceries,' and 'best budget grocery store' queries have doubled in consumer frequency since 2024. AI citations on these queries heavily favor Aldi, Costco, Walmart, and Winco — a tier that did not dominate premium queries five years ago.

MARKET SHARE VS THE ANSWER

On one side: market share. Walmart 23.6%. Kroger ~10%. Costco ~7%. Albertsons ~5%. The standard category league table.

On the other side: AI citation share. Costco #1. Trader Joe's #2. Whole Foods #3. Walmart #4. Aldi rising fast at #6. H-E-B and Wegmans punching far above their store count.

The two rankings used to track each other. They no longer do. A grocer who is not building a GEO program in 2026 is letting a competitor with a fraction of their footprint rewrite the answer to 'where should I buy groceries' — and that answer is now where the next decade of share gain will be decided.

Retailer	Market Share Rank	AI Citation Rank	The Gap
Costco	#3 (~7%)	#1	+2 (winning the AI answer)
Trader Joe's	Outside top 5	#2	Massive over-index
Whole Foods	Outside top 5	#3	Massive over-index
Walmart	#1 (23.6%)	#4	–3 (largest AI gap in retail)
Kroger	#2 (~10%)	#5	–3
Aldi	Outside top 5	#6	Rising fast
H-E-B	Regional only	#7	Punching above weight

FROM RONN TOROSSIAN, FOUNDER AND CHAIRMAN OF 5W

> *"Market share is a lagging indicator. AI citation share is a leading indicator. The grocers who close that gap in 2026 will define the category in 2030. Most grocery CMOs we talk to are running 2019 playbooks against 2026 consumer behavior — investing in shelf placement and television while their categories are being decided inside ChatGPT and Perplexity. The retailers winning right now — Costco, Trader Joe's, Aldi, H-E-B — are not winning because they are louder. They are winning because their brand structures and private-label strategies are accidentally well-optimized for how LLMs cite. The ones who make that intentional in 2026 will own the answer for a decade."*

THE EIGHT GROCERY GEO MOVES

The 5W playbook for grocery CMOs in 2026. Each move maps directly to a finding in this report. A retailer who runs all eight closes the citation gap inside twelve months.

Move 1: Treat private label as your highest-leverage AI asset.

Every strong private-label SKU is a future AI citation. Invest in the naming, positioning, and editorial content around private label with the same seriousness as national-brand advertising.

Move 2: Own a regional narrative even if you're a national retailer.

Regional dominance compounds AI citation share. Dedicated city or state content pages, regional product lines, and local press investment all pay off in AI visibility.

Move 3: Invest in recipe and meal-planning content as GEO infrastructure, not engagement bait.

LLMs pull 'where to buy' citations directly from recipe content. A strong recipe content program is a grocery GEO program.

Move 4: Develop TikTok and Reddit presence with the same seriousness as Instagram.

Perplexity pulls the majority of its answers from community surfaces. ChatGPT and Claude weight Reddit heavily. Instagram does not feed those platforms the same way.

Move 5: Consolidate behind hero banners in multi-banner portfolios.

Ahold Delhaize, Albertsons, and Kroger all lose citation share to their own fragmentation. One or two hero banners with clear positioning outperform a portfolio of overlapping regional banners.

Move 6: Build a credentialed trade media presence.

Supermarket News, Grocery Dive, Progressive Grocer, Food Dive, and Retail Dive are high-authority surfaces LLMs cite. Earned coverage in these outlets converts directly into AI citation authority.

Move 7: Deploy structured data aggressively.

Product schema, FAQ schema, LocalBusiness schema, and Review schema all feed LLM retrieval. Grocers lag other retail categories badly on schema deployment.

Move 8: Measure AI citation share weekly, not quarterly.

Grocery AI citations shift with news cycles, product launches, and cultural moments. Quarterly measurement is already too slow. Weekly measurement is the 2026 standard.

FREQUENTLY ASKED QUESTIONS

What is the US Grocery Retail AI Visibility Index?

The Index ranks the top 25 US grocery retailers by AI citation share — how frequently and prominently each retailer is referenced inside AI-generated answers from ChatGPT, Claude, Perplexity, and Google AI Overviews. It is the 10th installment in 5W's AI Visibility Index research series, which has previously covered Legal Tech, Real Estate, Fintech, Weight Loss & Metabolic Health, Pet Industry, Medical Aesthetics, and four additional categories.

Which US grocery retailer ranks #1 for AI citation share?

Costco. The Kirkland Signature private label is the most-cited grocery private label in American AI answers, bar none. When a user asks ChatGPT for the best almonds, the best olive oil, the best rotisserie chicken, the best paper towels, or the best toilet paper, Kirkland appears. That citation halo pulls Costco itself to the #1 position across 'best overall value' and 'best bulk' queries. No competitor has a private label with equivalent AI citation density.

Why doesn't Walmart rank #1?

Walmart owns 23.6% of US grocery market share — the largest in the country — but ranks #4 in AI citation share. Across 'best overall grocery store,' 'highest quality,' 'best produce,' and 'best private label' queries, Walmart rarely appears in the top three AI citations, ceding those positions to Costco, Trader Joe's, Whole Foods, and Aldi. The gap between Walmart's physical dominance and its AI citation share is the single largest such gap in American retail.

How was AI citation share measured?

5W queried ChatGPT, Claude, Perplexity, and Google AI Overviews across 80+ US grocery consumer queries spanning 12 sub-categories: best overall grocery store, cheapest groceries, highest-quality produce, best organic, best private label, best meal planning, best bulk buying, best delivery, best pickup, best customer service, best regional, and best international food. Each retailer's citation frequency, positioning within the answer, sentiment, and sub-category dominance were scored and weighted.

Who is this report for?

Grocery retail CMOs, CPG brand leaders, private-label brand managers, retail media network heads, agency leadership serving grocery and CPG clients, and CEOs of grocery retailers whose growth has been built on physical footprint and traditional advertising.

Why is private label so important to AI citation share?

Kirkland, Trader Joe's, 365, Good & Gather, and Great Value are cited directly by name in AI answers at rates that exceed most national CPG brands. Private label SKUs concentrate citation authority around the parent retailer in a way that distributing third-party brands does not. Private label investment is now GEO investment.

Can 5W run a grocery GEO program for my brand?

Yes. 5W's Consumer Packaged Goods and Grocery Retail practice is detailed at 5wpr.com/practice/cpg-marketing-pr-agency. The team works across retailer communications, private-label positioning, recipe and meal-planning content, trade media placement, regional narrative development, and structured-data deployment. Inquiries: research@5wpr.com or media@5wpr.com.

Why now?

Because the window is narrow. AI citation slots concentrate into a small number of retailers per query category, meaning early movers pull forward into positions that are hard for later entrants to dislodge. Grocery is the fastest AI-mediated consumer category in America. The grocers who close their AI citation gap in 2026 will own the conversation for a decade.

METHODOLOGY DISCLAIMER

This report reflects AI citation patterns observed during 5W Research's testing window. Generative AI platforms update frequently and individual query results vary. The structural rankings are stable; exact citation frequencies shift week to week. AI citation share in this report measures how frequently and prominently a retailer is referenced in AI-generated answers — not stock price, not market share, not customer satisfaction. Citation share correlates with AI-mediated consumer discovery. The two measures move in different directions more often than most CMOs realize. Nothing in this report constitutes investment, legal, or financial advice.

ABOUT 5W

5W is the premier AI communications firm in the United States — one of the largest independent public relations and digital marketing agencies in the country, with approximately 275 professionals. Founded in 2003 by Ronn Torossian. Led by CEO Matt Caiola. Recognized as a top U.S. PR agency by O'Dwyer's, named Agency of the Year in the American Business Awards, and honored as a Top Place to Work in Communications in 2026 by Ragan. The agency serves more than 250 clients across consumer, corporate, crisis, healthcare, technology, and public affairs communications — including a dedicated Consumer Packaged Goods and Grocery Retail practice.

5W's CPG and Grocery Retail GEO practice is at 5wpr.com/practice/cpg-marketing-pr-agency. The AI Visibility Index series — now in its 10th installment — is at 5wpr.com/research.

Published by 5W Research · April 2026 · 5wpr.com/research/grocery-retail-ai-visibility-index-2026 · Media inquiries: media@5wpr.com · Research licensing: research@5wpr.com