

IRI Fresh COE + Market & Shopper Intelligence

FRESH FOODS SHOPPING BEHAVIOR

IRI Household Panel data, including random-weight reference card scans from the National Consumer Panel

Results as of 12/27/20

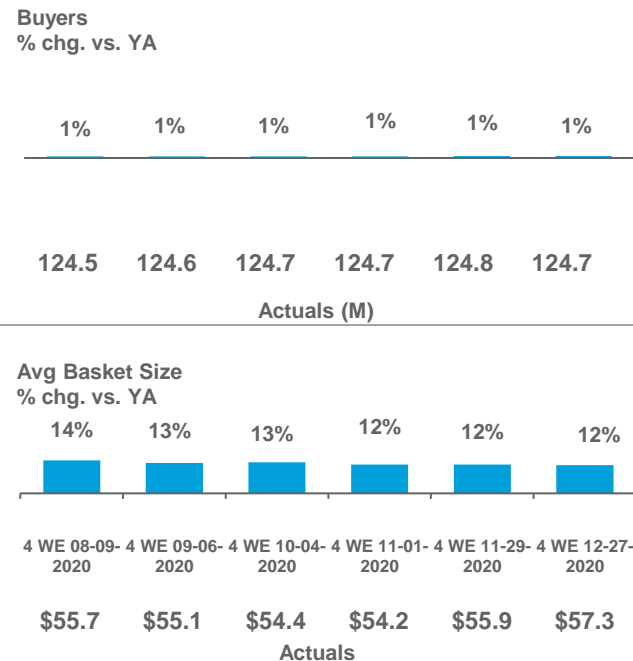
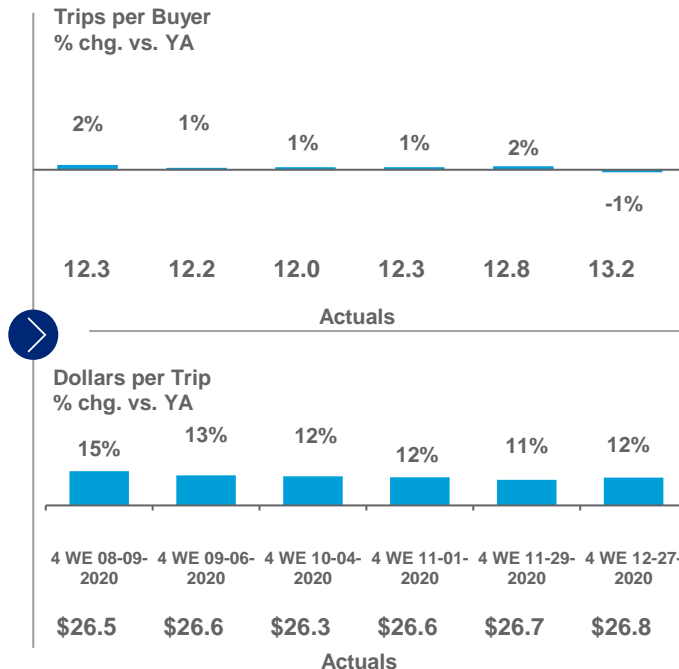
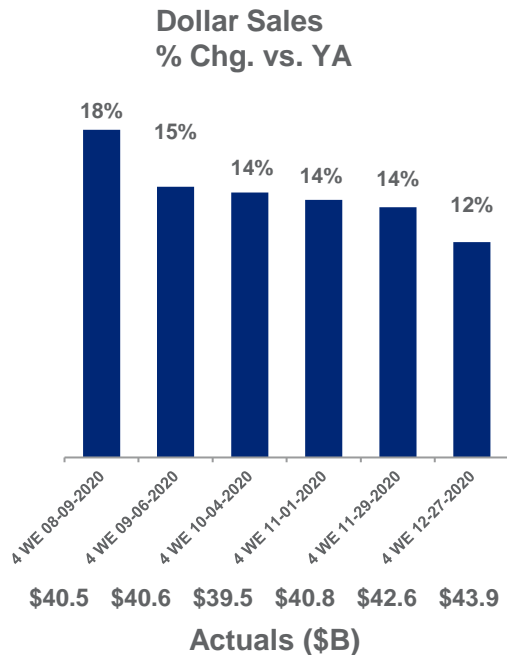


IRi
Growth delivered.



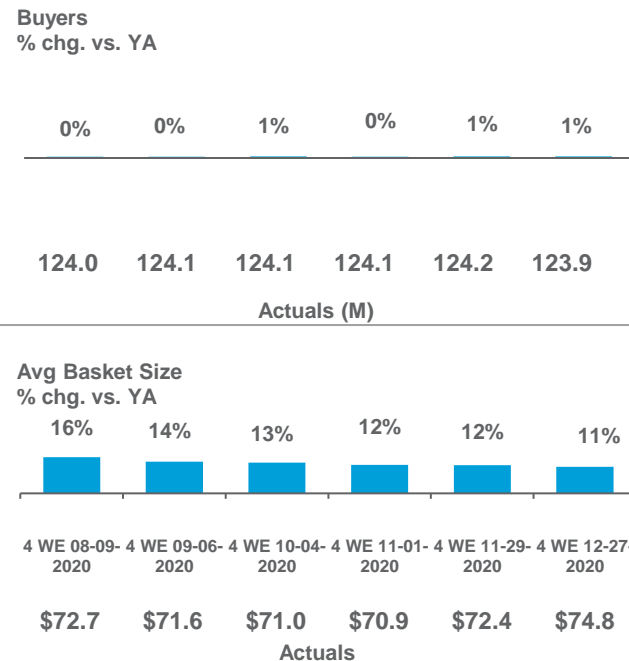
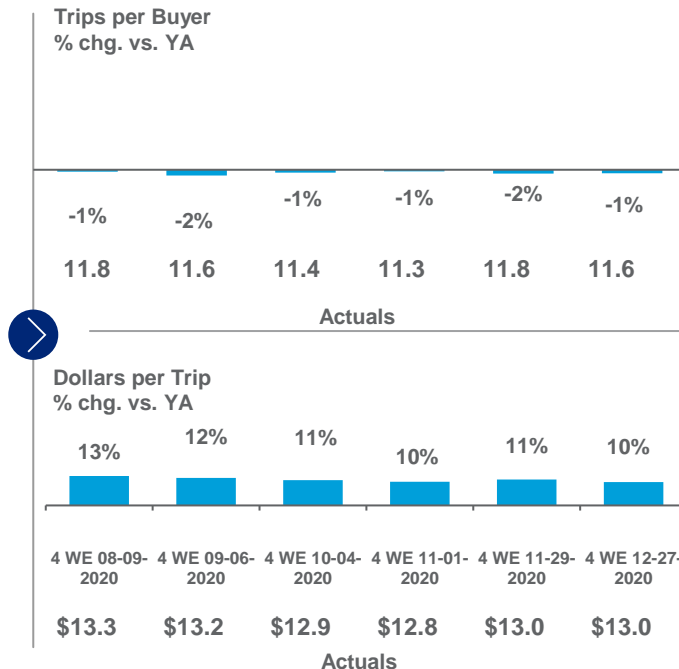
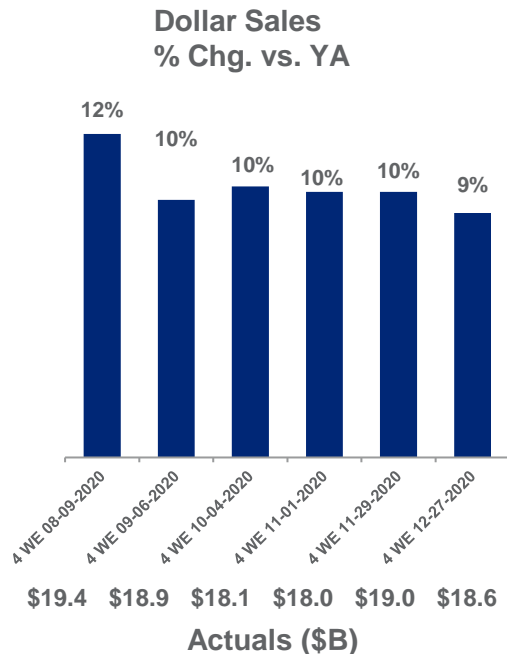
Across All Retail Outlets, Food & Beverage saw slightly fewer trips than year ago but continued elevated spending and total store basket size

Total U.S. All Outlets Total Edible with FW/RW Combined, Consumer Purchasing Dynamics



Across All Retail Outlets, Fresh Foods saw Stable Buyers and Frequency, but Elevated Spending as Part of an Overall Larger Total Store Basket

Total U.S. All Outlets Fresh Foods with FW/RW Combined, Consumer Purchasing Dynamics

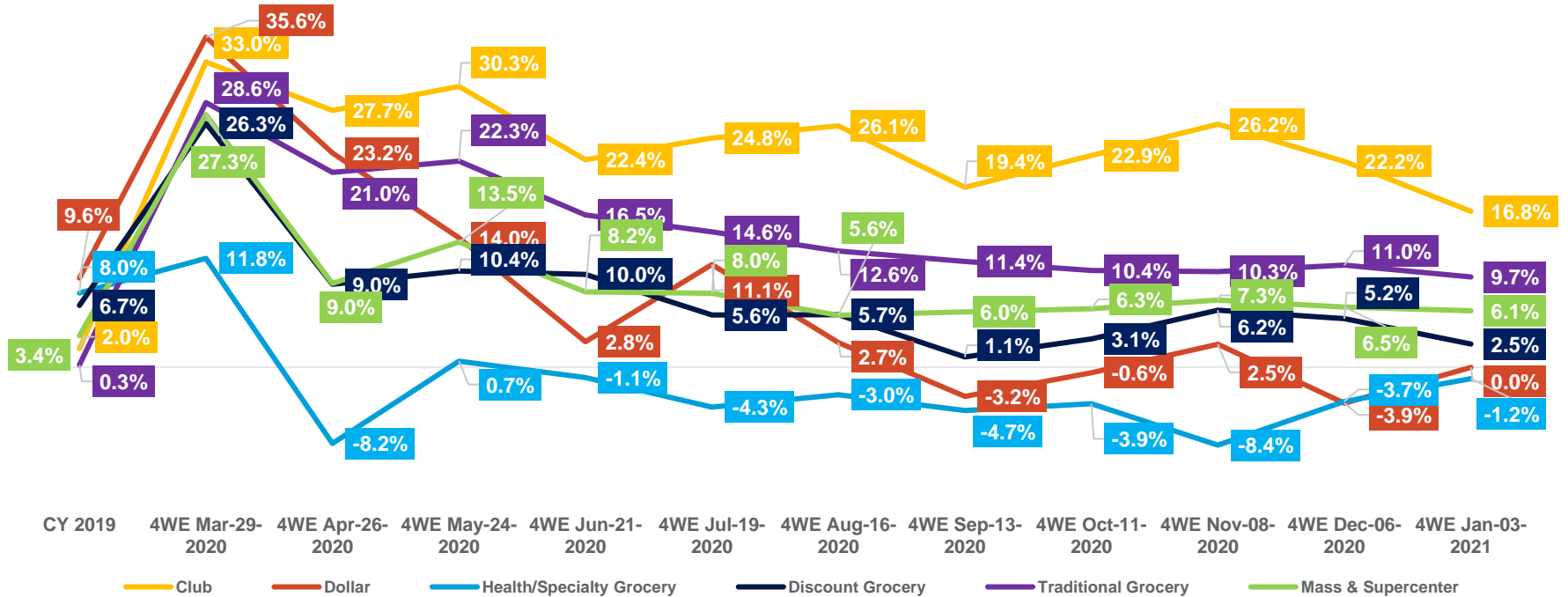


In December, Traditional Grocery and Club Remained Above 2019 and the Holidays Helped Traditional Grocers Command the Highest Share Since July

Fresh Channels Share	CY 2019	4WE Mar-29-2020	4WE Apr-26-2020	4WE May-24-2020	4WE Jun-21-2020	4WE Jul-19-2020	4WE Aug-16-2020	4WE Sep-13-2020	4WE Oct-11-2020	4WE Nov-08-2020	4WE Dec-06-2020	4WE Jan-03-2021
Club	9.8%	10.4%	10.9%	11.1%	10.5%	10.6%	11.0%	10.6%	10.7%	11.2%	10.8%	10.5%
Dollar	0.5%	0.5%	0.5%	0.4%	0.5%	0.4%	0.4%	0.4%	0.5%	0.4%	0.4%	0.4%
Health/Specialty Grocery	4.0%	3.6%	3.2%	3.4%	3.4%	3.4%	3.4%	3.5%	3.4%	3.2%	3.3%	3.3%
Discount Grocery	8.0%	7.8%	7.7%	7.5%	7.8%	7.6%	7.5%	7.2%	7.3%	7.6%	7.7%	7.2%
Traditional Grocery	41.5%	41.9%	43.0%	42.7%	42.5%	42.4%	41.9%	42.1%	41.3%	41.1%	41.5%	42.1%
Mass & Supercenter	15.5%	15.4%	14.8%	14.5%	14.8%	14.8%	14.7%	14.8%	15.0%	15.3%	15.3%	14.6%

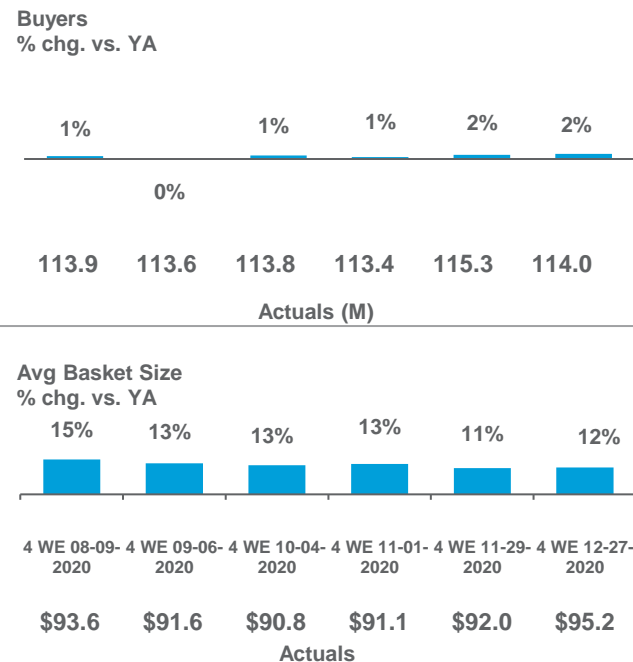
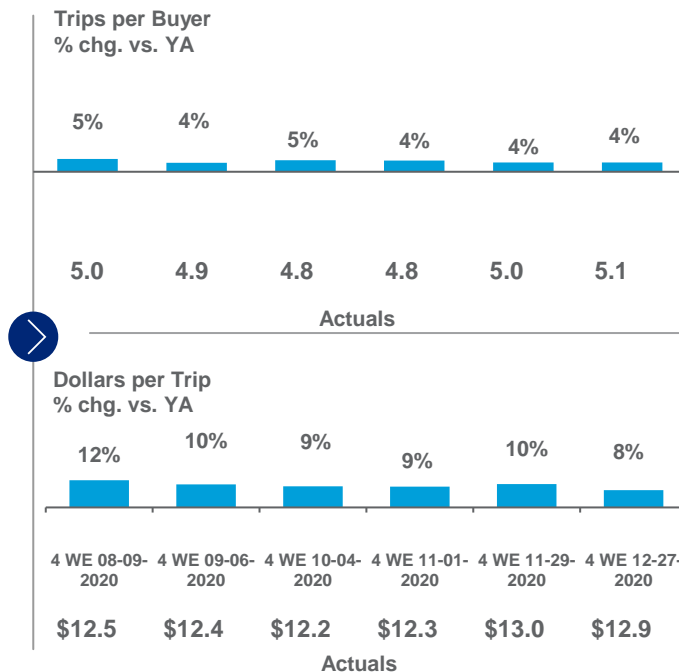
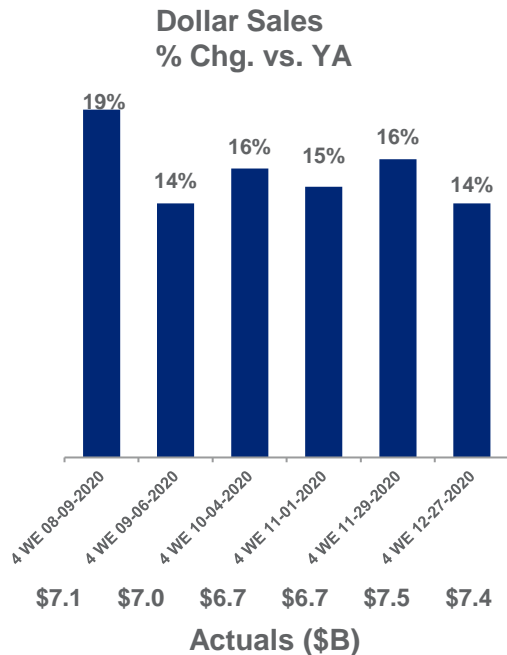
Fresh Foods Dollar Sales Growth is Also Strongest in Club and Traditional while Health/Specialty Grocers Saw a Lower Sales Performance than Dec 2019

Fresh Channels - % change vs YA



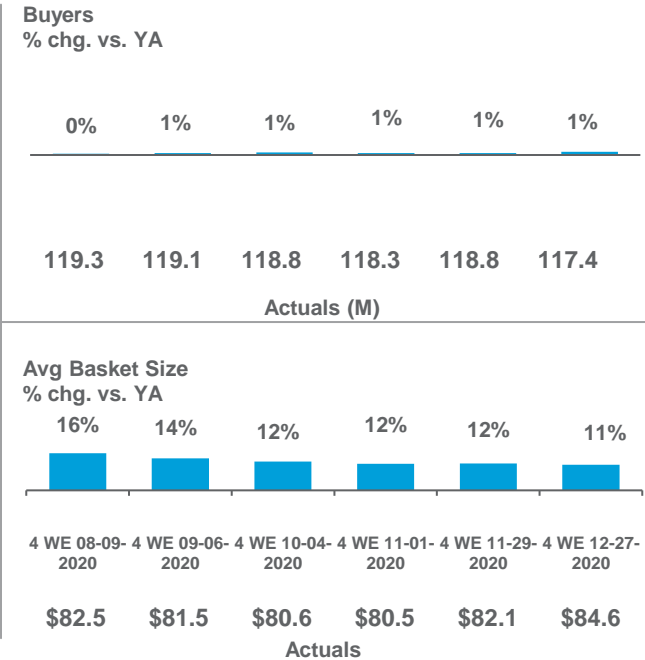
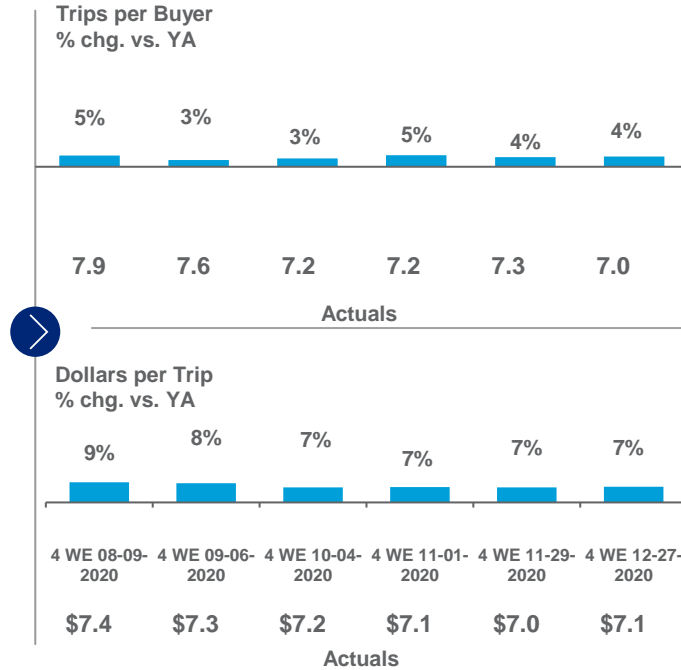
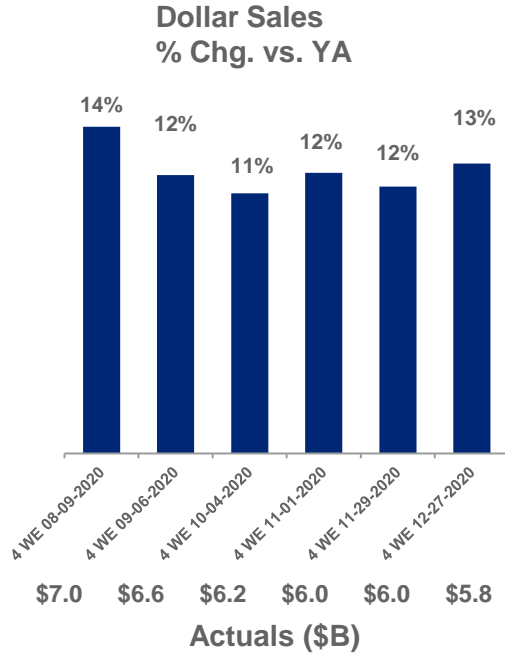
Meat sales declined in the latest period led by decreased dollars per trip

Total U.S. All Outlets Total Meat with FW/RW Combined, Consumer Purchasing Dynamics



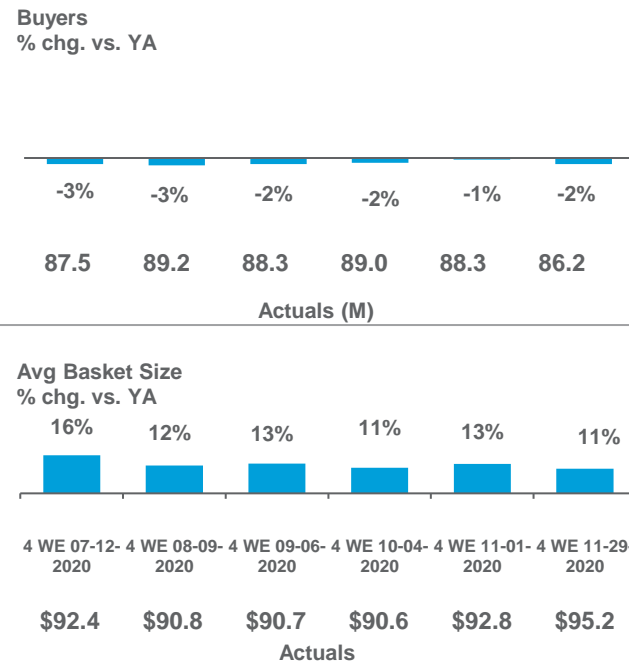
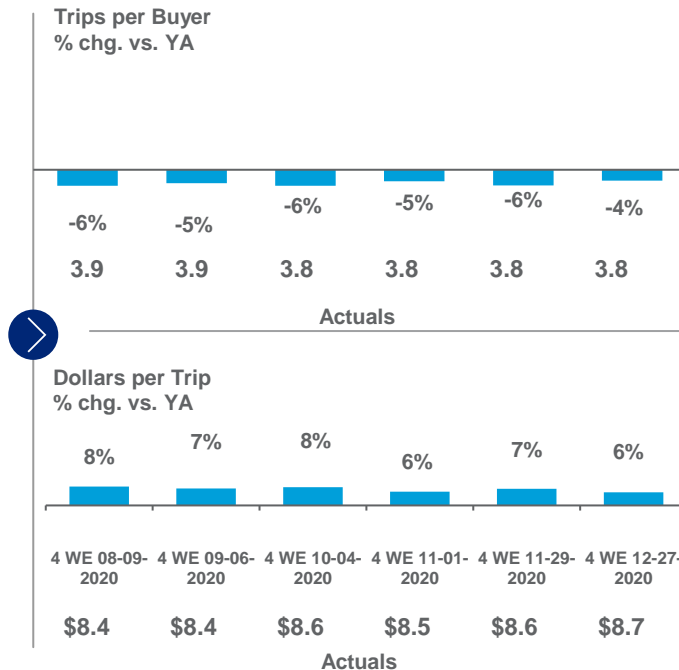
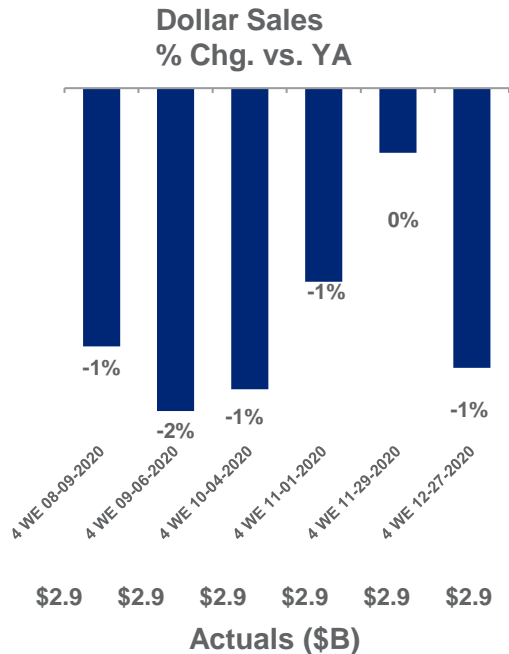
Produce grew in sales in the latest period vs YA

Total U.S. All Outlets Produce with FW/RW Combined, Consumer Purchasing Dynamics



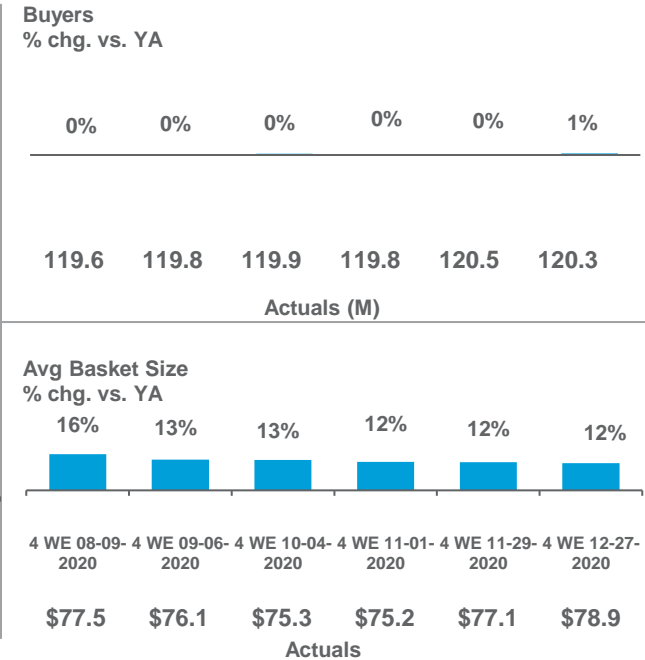
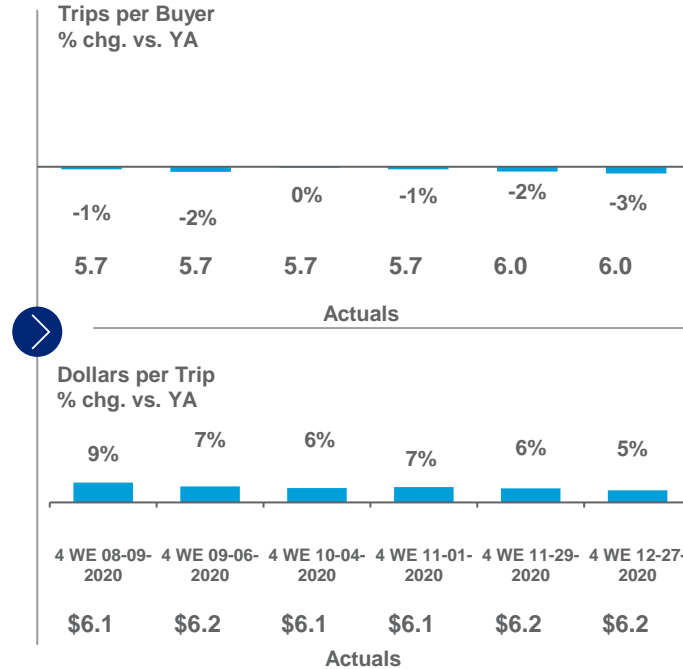
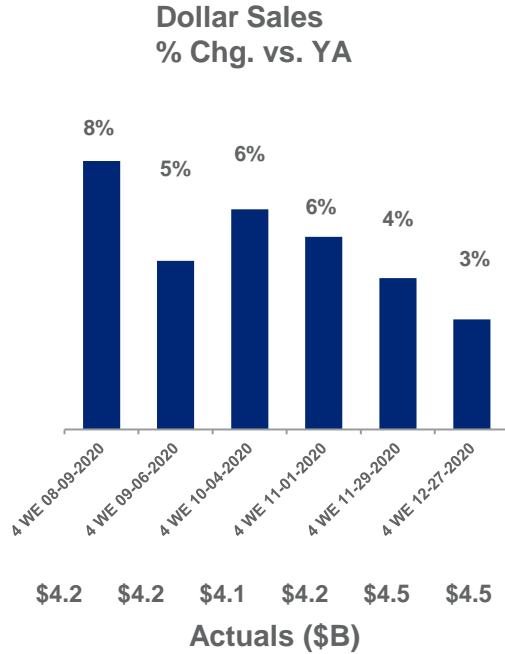
Lesser trips per buyers, dollars per trip and basket size led to the decline of Deli in latest period

Total U.S. All Outlets Deli with with FW/RW Combined, Consumer Purchasing Dynamics



Baked Goods has declined in sales due to lesser trips per buyer and dollars per trip

Total U.S. All Outlets Baked Goods with FW/RW Combined, Consumer Purchasing Dynamics



Seafood sales has declined in latest period led by decreased buyers, dollars per trip and basket size

Total U.S. All Outlets Seafood with FW/RW Combined, Consumer Purchasing Dynamics

