How Americans Are Shopping During COVID-19
Data through time period week ending 5/2

DEFINING PANTRY WITH AT-HOME ORDERS

Consumer behavior shifts: Home Gardening materials (soil and lawn fertilizers) take off as temperatures warm up and consumers engage in outdoor activities. Previous stock-ups in non-food departments like Health and Beauty, Pet Care, and Baby Care drive current week decline. Produce takes its spot in the top 5 for the first time since beginning.

Online trips are starting to decline at an accelerated pace, while basket values hold strong. There are 10 million new buyers purchasing online since the start of COVID, attracting both younger (18-24) and older shoppers (65+).

CONSUMER TRENDS

U.S. shoppers seek outdoor categories while continuing in-home food and beverage consumption.

CENTER STORE
Consumers shop for outdoor Gen Merch categories along with food staples

STORES
Penetration rises for the first time in six weeks

E-COMMERCE
Sharp decline in trips. Basket values show further growth

CHANNELS
Shoppers return to Grocery & Warehouse Club stores

CATEGORY IMPACTS

ACCELERATED GROWTH
B&M | eCom

MEAT 44% | NA

FROZEN 38% | NA

ALCOHOL 38% | 341%

DAIRY 28% | 81%

PRODUCE 25% | NA

CHG IN RANKED IMPACT
AROC % CHG

BACON, DINNER SAUSAGE, BEEF

ICE CREAM, PIZZA, SHRIMP

WINE, BEER, CIDER

CHEESE, EGGS, COWS MILK

POTATOES, PRE PACKAGED SALADS, STRAWBERRIES

GROWTH DRIVERS

E-COMMERCE

CLICK & COLLECT
UP 94%
23% of Online sales

HOME DELIVERY
UP 42%

INCREASE IN BUYERS
↑ 22%

FEWER TRIPS
↓ 10%

HIGHER BASKET VALUES
↑ 14%

ONLINE NEW BUYERS

FROM COVID START
~10MM
28%

NEW BUYERS TO CPG ONLINE

% NEW BUYERS REPEATING ONLINE

WHO IS NEW?

BRICK AND MORTAR

Store penetration is higher than average for the first time in six weeks.

GENERAL MERCHANDISE GAINS

General Merchandise grew 21% after weeks of decline; gains driven by Outdoor Categories.

<table>
<thead>
<tr>
<th>BRICK &amp; MORTAR</th>
<th>Soil</th>
<th>Fertilizer</th>
<th>Fire Material &amp; Fuel</th>
</tr>
</thead>
<tbody>
<tr>
<td>B&amp;M</td>
<td>54%</td>
<td>27%</td>
<td>68%</td>
</tr>
</tbody>
</table>

CHANNELS

% CHANGE IN SHOPPERS

Shoppers reemerge for Meat & Produce at Grocery and Warehouse Club stores.

TRENDS

<table>
<thead>
<tr>
<th>TOTAL OUTLETS</th>
<th>GROCERY</th>
<th>MASS</th>
<th>DRUG</th>
<th>WAREHOUSE CLUB</th>
<th>DOLLAR</th>
</tr>
</thead>
<tbody>
<tr>
<td>+3%</td>
<td>+3%</td>
<td>-11%</td>
<td>+9%</td>
<td>-5%</td>
<td></td>
</tr>
</tbody>
</table>

TOTAL OUTLETS - % CHANGE VS 2019 AVG

<table>
<thead>
<tr>
<th>PENETRATION</th>
<th>FREQUENCY</th>
<th>BASKET SIZE</th>
</tr>
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<tbody>
<tr>
<td>+2%</td>
<td>+2%</td>
<td>+2%</td>
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</tbody>
</table>

Data Source: Nielsen Homescan, w/e 5/2/20 vs 2019 weekly avg

FOR FURTHER WEEKLY DETAIL CONTACT YOUR LOCAL NIELSEN REPRESENTATIVE