How Americans Are Shopping During COVID-19
Data through time period week ending 6/27

DEFINING PANTRY WITH CONTINUED REOPENING OF STATES

Consumer behavior shifts: Pantry loading slowed down in brick & mortar and online. The drop was consistent across all major food and beverage departments, except for bakery in B&M, which saw accelerated growth this week. Alcohol and Baby growth improved online. During COVID, dollar growth has been primarily driven by unit increases contrary to the historic trends.

Online trips rebounded, but for the first time since COVID's start, the increase in buyers slowed down to a single-digit growth rate. B&M basket values decline yet again.

CONSUMER TRENDS

U.S. shoppers’ pantry loading slows with Total Store growing at half the level compared to the first eight weeks of COVID.

CENTER STORE
Consumer demand levels off, but still higher than pre-COVID levels

E-COMMERCE
Trips increase, baskets remain strong

STORES
Basket values remain high, but shrink for the third consecutive week

CHANNELS
Share of trips grows for online

E-COMMERCE CENTER STORE
Consumer demand levels off, but still higher than pre-COVID levels

CHANNELS
Share of trips grows for online

SHARE OF TRIPS % CHG VS 2019

An initial increase in trip share went to Grocery, but has since moved to “other,” primarily online.

BRICK AND MORTAR
Frequency remains below average, while basket values continue to slip.

DOLLAR DECOMP
Over 60% of dollar growth came from consumption increase, contrary to previous years when growth was mostly driven by price/mix changes.

CATEGORY IMPACTS

ACCELERATED GROWTH

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>B&amp;M</th>
<th>e-Com</th>
</tr>
</thead>
<tbody>
<tr>
<td>FROZEN</td>
<td>21%</td>
<td>NA</td>
</tr>
<tr>
<td>ALCOHOL</td>
<td>20%</td>
<td>241%</td>
</tr>
<tr>
<td>MEAT</td>
<td>16%</td>
<td>NA</td>
</tr>
<tr>
<td>PRODUCE</td>
<td>18%</td>
<td>NA</td>
</tr>
<tr>
<td>DAIRY</td>
<td>13%</td>
<td>81%</td>
</tr>
</tbody>
</table>

CHG IN RANKED IMPACT

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th>B&amp;M</th>
<th>e-Com</th>
</tr>
</thead>
<tbody>
<tr>
<td>COMPLETE MEAL, POTATOES, MAIN COURSE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>STILL WINE, CIDER, COCKTAIL MIXERS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BACON, FRANKFURTER, DINNER SAUSAGE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PRE-PACKAGED SALADS, STRAWBERRIES, TOMATOES</td>
<td></td>
<td></td>
</tr>
<tr>
<td>NON-SPECIALTY CHEESE, EGGS, DOUGHS</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

GROWTH DRIVERS

PRICE & UNITS CONTRIBUTION TO $ GROWTH

50% ONLINE GROWTH SINCE START

CLICK & COLLECT UP 95%

HOME DELIVERY UP 40%

INCREASE IN BUYERS 8%

INCREASE IN TRIPS 2%

HIGHER BASKET VALUES 12%

TOTAL STORE TRENDS

Pantry loading stalled in the latest 8 weeks of COVID, although it’s still outpacing pre-COVID levels.

SHARE OF TRIPS BY CHANNEL

An initial increase in trip share went to Grocery, but has since moved to “other,” primarily online.

DOLLAR DECOMP
Over 60% of dollar growth came from consumption increase, contrary to previous years when growth was mostly driven by price/mix changes.

PRICE & UNITS CONTRIBUTION TO $ GROWTH

DOLLAR DECOMP
Over 60% of dollar growth came from consumption increase, contrary to previous years when growth was mostly driven by price/mix changes.

PRICE & UNITS CONTRIBUTION TO $ GROWTH

DOLLAR DECOMP
Over 60% of dollar growth came from consumption increase, contrary to previous years when growth was mostly driven by price/mix changes.

50% ONLINE GROWTH SINCE START

CLICK & COLLECT UP 95%

HOME DELIVERY UP 40%

INCREASE IN BUYERS 8%

INCREASE IN TRIPS 2%

HIGHER BASKET VALUES 12%

SHARE OF TRIPS % CHG VS 2019

An initial increase in trip share went to Grocery, but has since moved to “other,” primarily online.

FOR FURTHER WEEKLY DETAIL, CONTACT YOUR LOCAL NIELSEN REPRESENTATIVE.