COVID-19 Impact

CONSUMER SPENDING TRACKER FOR MEASURED CHANNELS

U.S., UK, France, Italy, Germany, NZ

April 2, 2020

IRi Growth delivered.

BCG

Executive Summary

- As the COVID-19 outbreak accelerates in Europe and the United States, governments, businesses, and consumers are changing behaviors rapidly – this is reflected in consumer purchases in Italy, France, U.S., Germany, New Zealand, and UK.
- Trends from Italy (~3 weeks earlier to COVID-19 crisis than the U.S., UK and New Zealand as well as Germany and France (~2 weeks earlier) suggest consumer demand is beginning to stabilize, but remains high.
- In the U.S., IRI National Consumer Panel data shows customers are both making more trips and buying larger baskets in the most recent two weeks. Both pantry stocking and smaller quick trips were up significantly.
- Ecommerce trends in the U.S. show a significant uptick starting the week ending March 15, although brick & mortar sales spiked similarly, leaving overall online share slightly down.

1. MULO includes Grocery, Drug, Mass, Club (excluding Costco), Dollar and DeCA retailers

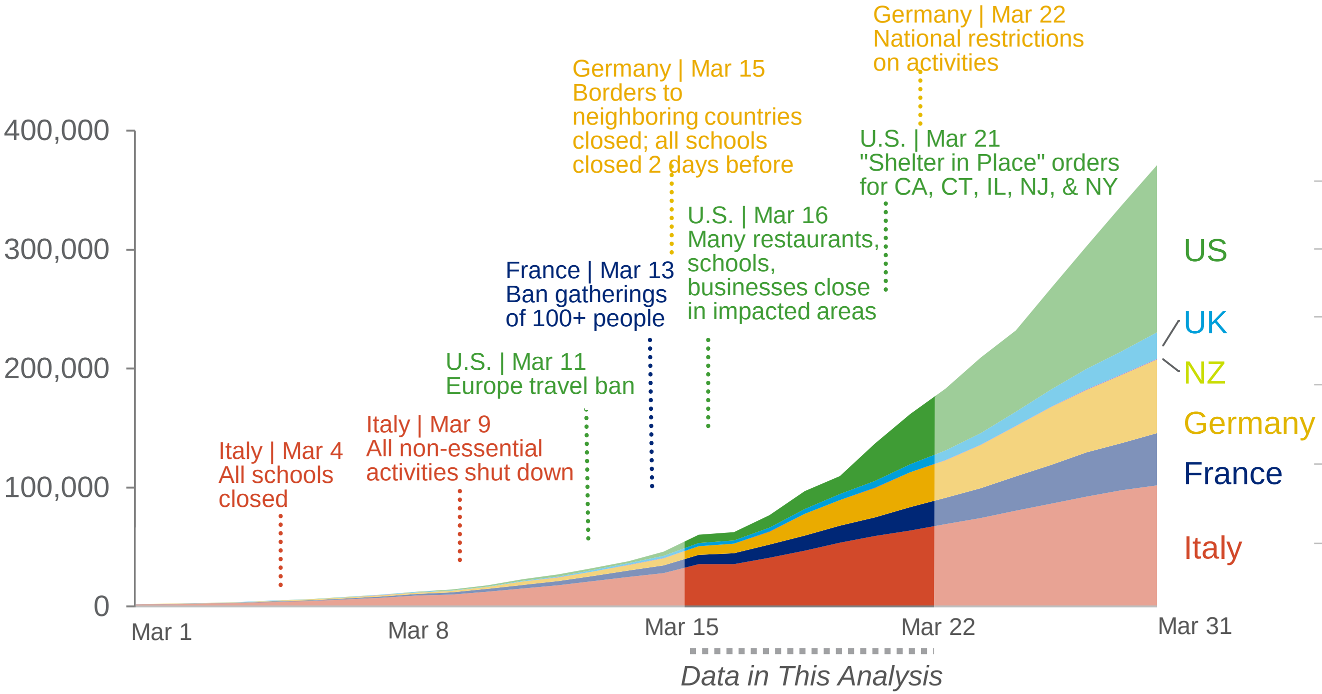
Document Contents

- Market Context and Conditions
- Consumer Spending Results by Category, Market and Channel
- Deep Dive:
  Shopping Behavior in the U.S.
- Deep Dive:
  eCommerce Results in the U.S.
- Appendix

market context and conditions

Countries are at Different Points in the Crisis, with Italy About ~3 Weeks Ahead and France About 2 Weeks Ahead of the U.S., NZ and UK

Cumulative # of Confirmed Cases; Data as of 3.31.2020



Cases Confirmed		
Total	*Past 24 hrs*	Deaths
140,640	17,987	2,398
22,145	2,619	1,408
647	58	1
61,913	4,615	583
43,977	4,335	3,017
101,739	4,050	11,591

Source: World Health Organization

COVID-Related Restrictions as of April 2, 2020 (1 of 2)

Italy

- Nationwide lock-down extended through Easter
- Travel restrictions
- Public gatherings banned, including weddings & funerals
- Schools and universities closed
- Bars and restaurants closed at 6PM
- Shops closed on weekends (except for pharmacies and grocery stores)
- In certain impacted areas, maximum radius for dog walking is 200 meters, and all outdoor sport that cannot be practiced at home is banned

France

- Strict lock-down for at least 4 weeks starting March 17
- Freedom of movement of citizens heavily restricted; only those who go to work, grocery stores or pharmacies are allowed on the streets
- New military operation "Resilience" announced to support logistics and medial support
- Support for companies and employees who don't work because of unemployment or to take care of their children, following the closure of schools
- Once health crisis is over, launch of massive investment plan & career revaluation in medical environment

Germany

- 8 of 9 borders sealed (exceptions made on individual basis)
- Schools across Germany are closed
- Nationwide closure of all non-essential businesses including restaurants, sports facilities, swimming pools, fitness studios and playgrounds
- Prohibition of group meetings (incl. faith communities) of more than 2 people, except families living together
- Family visits at Easter forbidden
- Accommodation offers only for necessary and not for tourist purposes
- Curfew in some cities (e.g., Freiburg, Bavaria)

COVID-Related Restrictions as of April 1, 2020 (2 of 2)

UK

- Gatherings of over 2 people not allowed. All events stopped, including weddings, baptisms and other ceremonies
- Increased restrictions on movement, stating that people should only leave their homes for:
  - Shopping for basic necessities such as food and medicine
  - One form of exercise / day
  - Any medical need, or to provide care a vulnerable person
  - Travelling to and from work, but only where absolutely necessary

New Zealand

- Month-long nationwide lock-down starting March 26
- Mass gatherings of any size are cancelled and public venues are closed
- Borders closed to non-residents
- $12B government stimulus package announced March 17
- All non-essential businesses will be closed and everyone will have to stay at home except for solitary exercise and visiting essential services
  - This includes delivery from restaurants, bars, and cafes

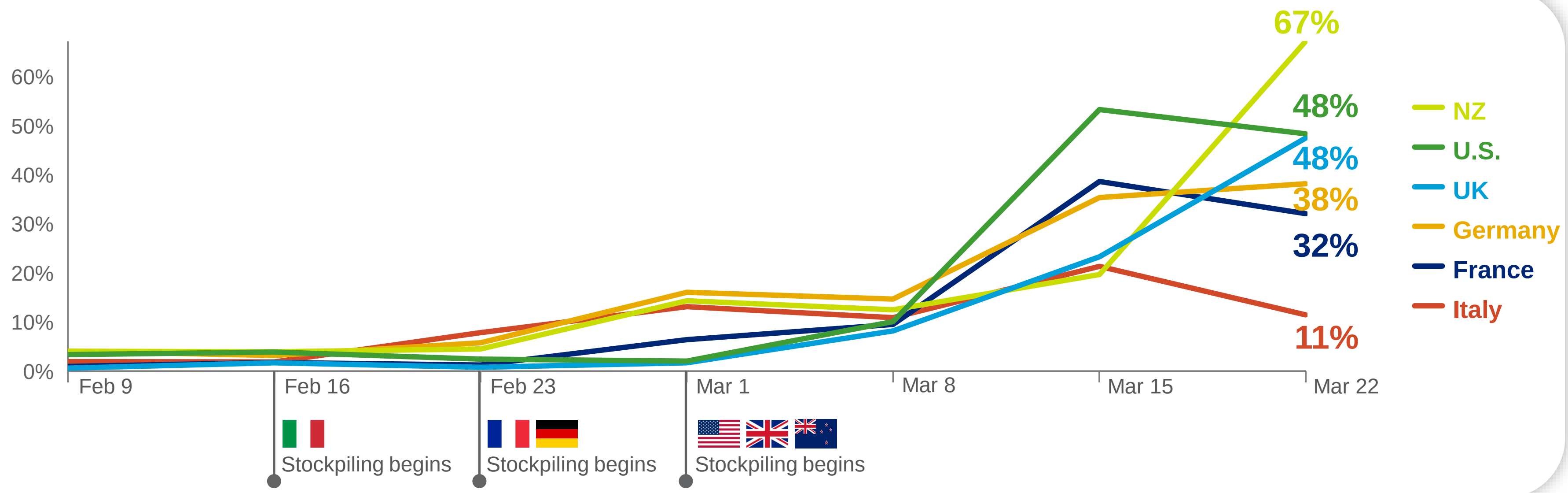
United States

- President Trump appealing to other countries for supplies to fight COVID-19 (e.g., masks, ventilators)
- Travel ban from Europe
- Several states have closed public schools, and bars and restaurants (except delivery service)
- At least 225 million people in 30+ states are being urged to stay home in the U.S.
- Invoked Defense Production Act that gives the power to direct civilian businesses to help meet orders for products necessary for national defense (currently on hold)

consumer spending tracking

Countries With Biggest Sales Increases Started Stockpiling Most Recently

$ Sales % Change vs. Year Ago
Week Ending February 9 – March 22, 2020



Sales Increased Dramatically Across Most Categories; Paper Products, Home Care and Frozen Foods Spiked in all Countries

% Change Most Recent Week vs. Year Ago, Based on Local Currency

Paper Products are in peak demand across all countries

Products that help consumers clean their homes remain in high demand

Frozen and Packaged Food purchases continue to increase as consumers stock their homes with long-lasting foods

LEGEND

50%+	5% to 10%
20% to 50%	<5%
10% to 20%	<0%

		Italy	France	Germany	NZ	UK	U.S.
	TOTAL STORE	11.5%	32.1%	38.2%	67.2%	47.5%	48.4%
NONEDIBLE	Paper Products	33.0%	97.7%	104.8%	198.9%	83.0%	97.9%
	Home Care	29.6%	57.9%	74.7%	118.1%	80.6%	75.3%
	OTC Healthcare	30.0%	0.0%	39.1%	157.1%	121.9%	60.1%
	Personal Care	-10.9%	4.1%	26.8%	69.1%	66.9%	35.6%
	Pet Food + Care	9.8%	56.2%	40.0%	62.6%	58.2%	37.3%
	Gen Merchandise	-42.4%	*NA*	36.2%	38.7%	33.1%	19.6%
	Cosmetics	-13.2%	-64.8%	-18.8%	117.3%	-11.3%	-4.8%
EDIBLE	Beverage	5.8%	22.4%	23.1%	41.2%	45.2%	28.2%
	Packaged Food	19.8%	49.8%	54.3%	97.5%	69.6%	76.2%
	Alcohol	8.5%	-1.5%	18.0%	22.3%	59.2%	39.6%
	Baby Food + Care	8.8%	35.9%	9.3%	75.4%	111.8%	41.9%
	Dairy	23.3%	40.2%	34.4%	46.2%	49.6%	58.1%
	Frozen Foods	36.7%	64.3%	45.7%	73.9%	84.4%	92.7%
	Fresh Foods	9.8%	19.0%	44.2%	43.6%	27.5%	43.4%

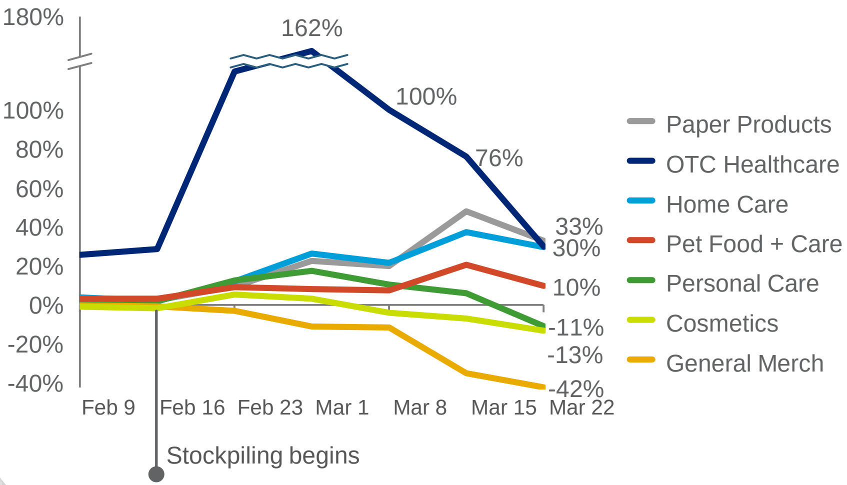
Source: IRI POS Data Week Ending March 15, 2020 2020 vs. Year Ago Note: Exact product categorization varies slightly by country

OTC Healthcare Trending Down, Still Driving Nonedible Increases With Paper and Home Care; Frozen Continues Driving Edible

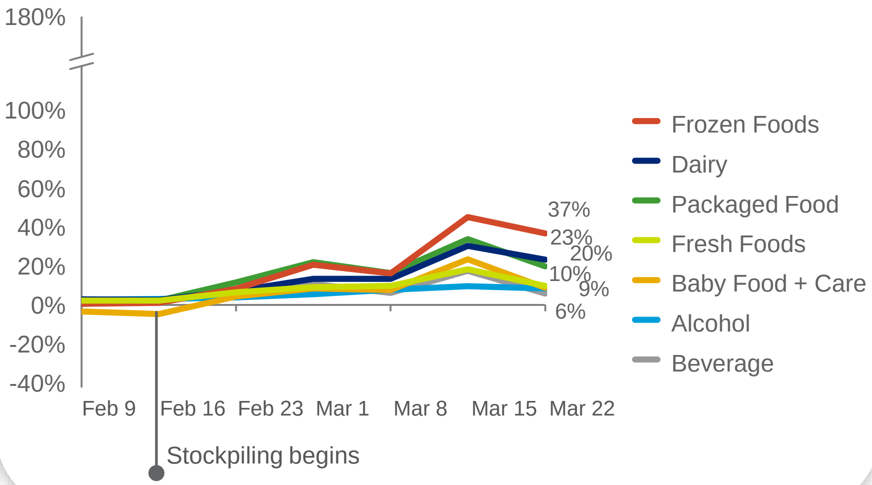
Italy

Week Ending February 9 – March 22, 2020
€ Sales % Change vs. Year Ago

Nonedible



Edible



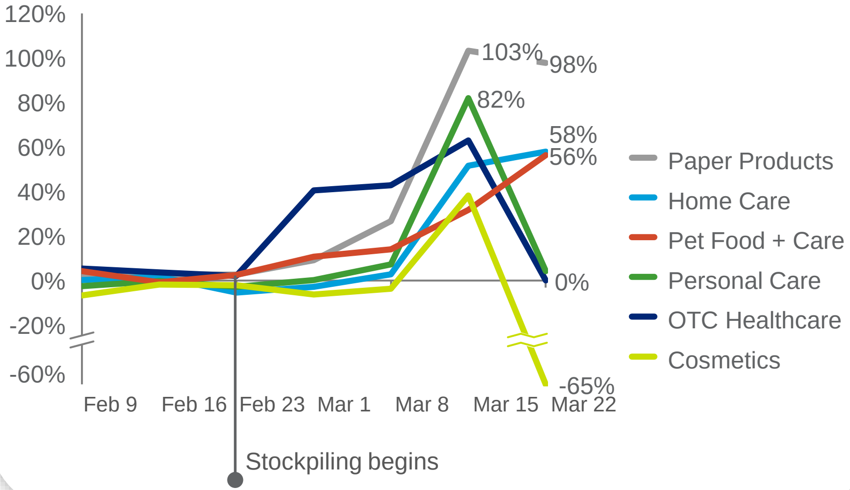
Note: Segments defined to evaluate representative companies. Source: IRI POS Data Ending March 22, 2020

Paper Products Continue Driving Nonedible, While Cosmetics Declines; Frozen and Packaged Foods Driving Edible

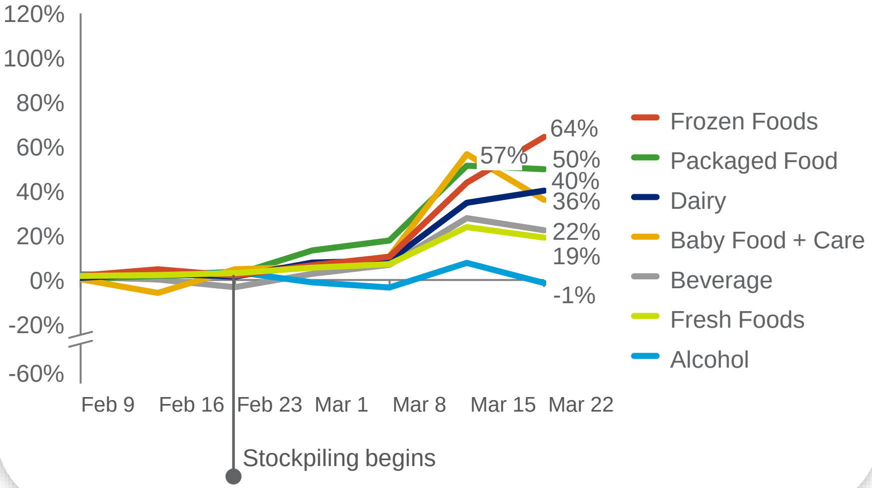
France

Week Ending February 9 – March 22, 2020
€ Sales % Change vs. Year Ago

Nonedible



Edible



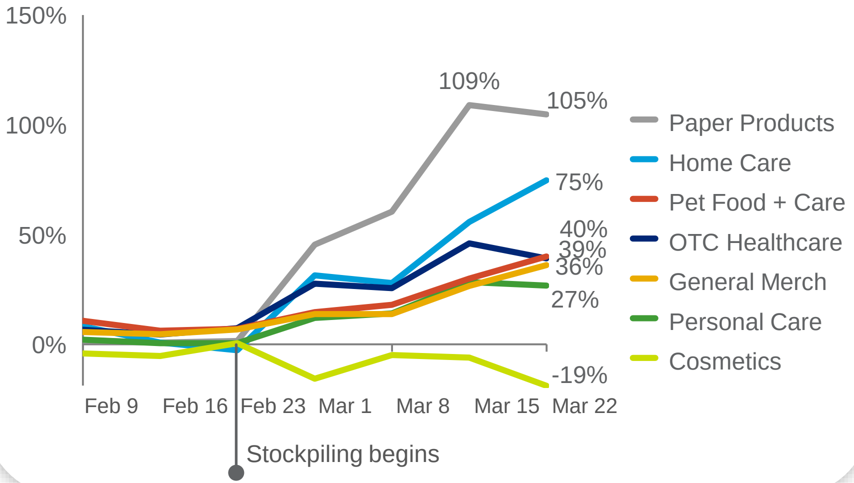
Note: Segments defined to evaluate representative companies. Source: IRI POS Data Ending March 22, 2020

Paper Products and Home Care Driving Nonedible Increases; Packaged Foods Driving Edible

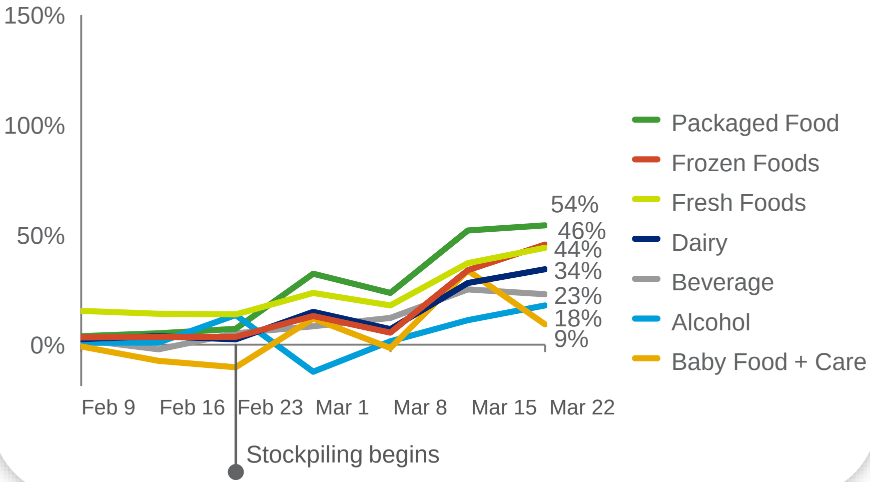
Germany

Week Ending February 9 – March 22, 2020
€ Sales % Change vs. Year Ago

Nonedible



Edible



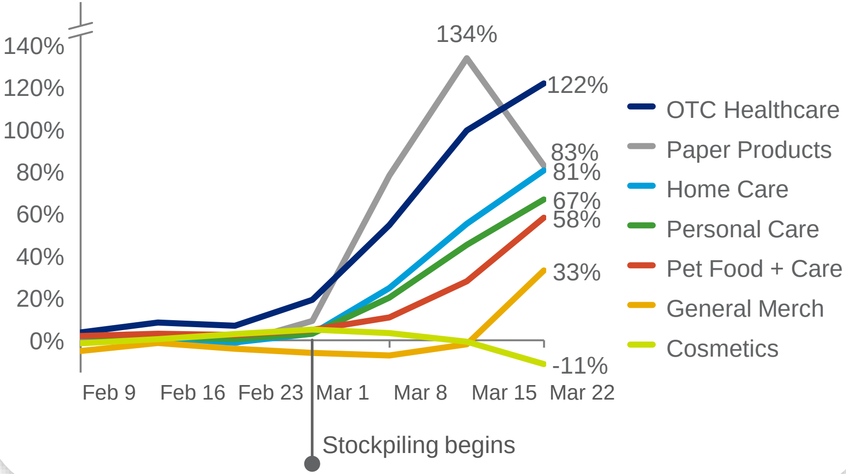
Note: Segments defined to evaluate representative companies. Source: IRI POS Data Ending March 22, 2020

OTC Healthcare, Baby Food + Care, and Frozen Food are in High Demand in the Most Recent Week

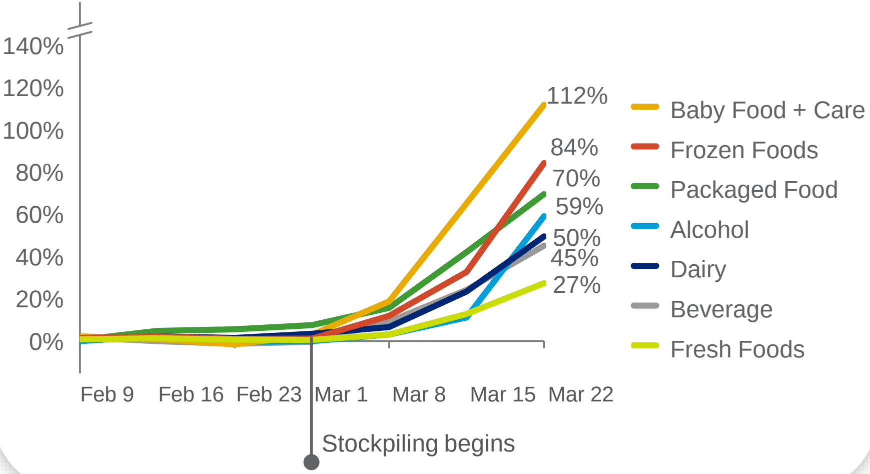
United Kingdom

Week Ending February 9 – March 22, 2020
£ Sales % Change vs. Year Ago

Nonedible



Edible



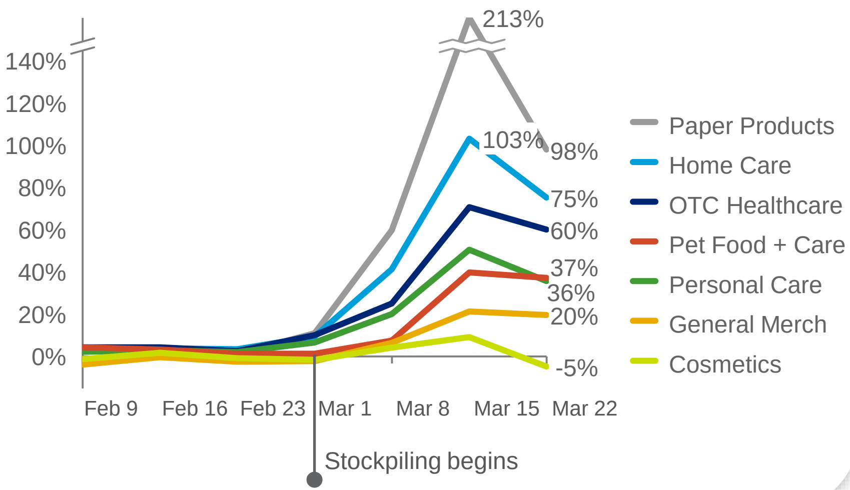
Note: Segments defined to evaluate representative companies. Source: IRI POS Data Ending March 22, 2020

Paper Products Trending Down, Still Driving Nonedible Increases; Edible Spikes Held from Prior Week, Continuing Frozen Emphasis

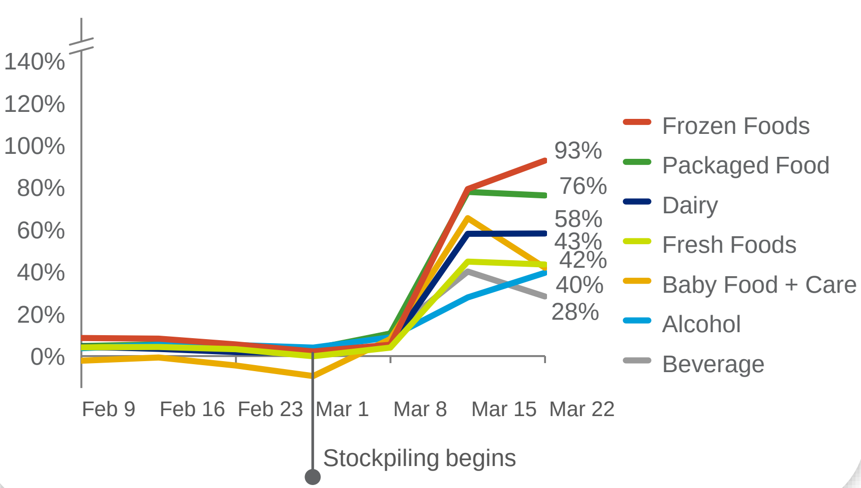
United States

Week Ending February 9 – March 22, 2020
$ Sales % Change vs. Year Ago

Nonedible



Edible

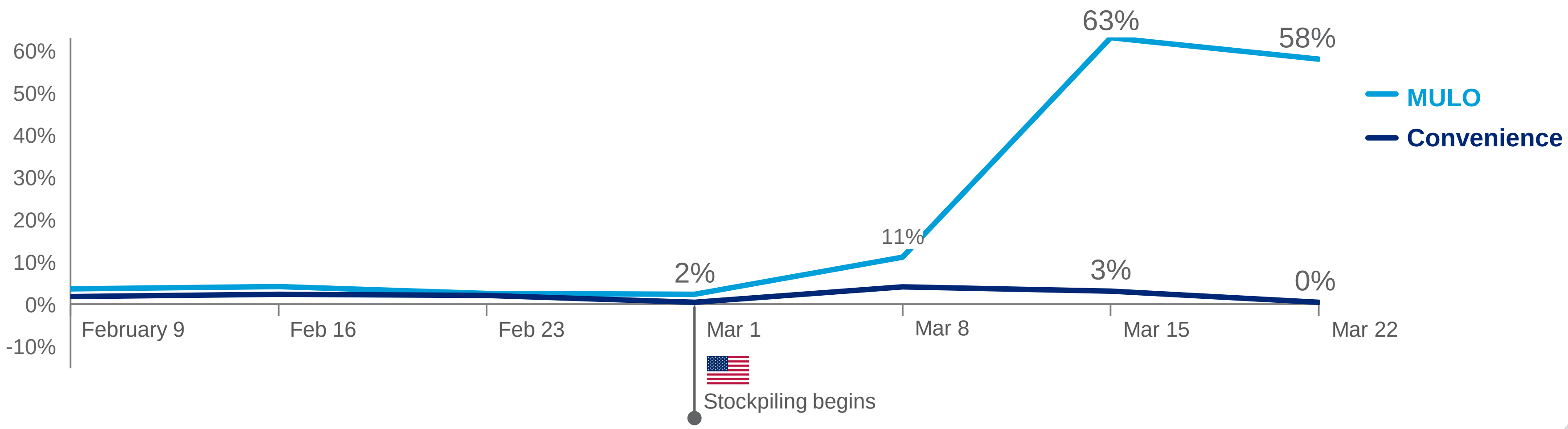


Note: Segments defined to evaluate representative companies. Source: IRI POS Data Ending March 22, 2020

Not Surprisingly, Shoppers are Still Going to Large Format Retailers to Stock Up

United States

Week Ending February 9 – March 22, 2020
$ Sales % Change vs. Year Ago



Source: IRI POS Data Ending March 22, 2020. Note: MULO includes Grocery, Drug, Mass, Club (excluding Costco), Dollar and DeCA retailers.

Top Growing Subcategories by Country (Latest Week)

EDIBLE
NONEDIBLE

Italy

SUBCATEGORY	% CHG
Accessories / Gloves	309.5%
Flour	185.9%
Body-Hands-Feet / Insect Repellent	182.9%
Prepared Mix for Pizza	147.8%
Videogames	143.5%
Brewer's Yeast and Ferments	142.4%
Pastry Ingredients	135.8%
Haberdashery	125.2%
Alcohol (Denatured)	120.1%
Prepared Mix for Cakes	119.5%

France

SUBCATEGORY	% CHG
Cleaning Gloves	306.0%
Flours	253.0%
Cooked Pasta Dishes	186.6%
Cooked French Dishes	177.8%
Bath Soaps	170.9%
Yeast and Flavored Sugar	169.5%
Dehydrated Potato Puree	167.1%
Bleach	155.1%
Canned Peas	144.0%
Dried Vegetables	141.6%

Germany

SUBCATEGORY	% CHG
Damp Cleansing Tissues	408.9%
Household Gloves	315.9%
Refreshing Tissues / Sticks	290.4%
Dried Potato Dumplings	241.9%
Hygiene / Sanitary Cleaner	240.0%
Semi-Finished Food in Shelf	226.2%
Homeopathic Remedies	206.6%
Soap	205.8%
Dried Potato Products	202.1%
Liquid Soups / Stews	187.7%

Source: IRI POS Data Week Ending March 22, 2020 vs. Year Ago

Top Growing Subcategories by Country (Latest Week)

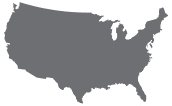
EDIBLE
NONEDIBLE

New Zealand

SUBCATEGORY	% CHG
Soup - Cereal	808.5
Rice - Medium Grain	788.6
Dietary Supplements - Immunity	739.8
Dietary Supplements – Cold & Flu	551.3
Canned Soup – Ready To Serve	449.9
Rice - Jasmine	428.9
Rice - Long Grain	417.3
Fire Needs - Firelighters	415.0
Rubber Gloves - Disposable	410.6
Canned Meat - Other Meat	389.0

UK

SUBCATEGORY	% CHG
Soup	206.0%
Canned Meats	196.8%
Canned Fish	163.7%
Sanitary Protection	143.8%
Frozen Meat	138.9%
Dry Pasta & Noodles	135.4%
Deos & Personal Wash	132.1%
Rice, Pulses & Cereals	129.9%
Canned & Bottled Fruit	129.3%
Canned & Packet Veg / Pasta	128.9%



United States

SUBCATEGORY	% CHG
Dry / Refrigerated Yeast	501.5%
SS Ham	327.4%
Refrigerated Canned Ham	312.9%
Water Devices	304.5%
Personal Thermometers	295.2%
Potato / Sweet Potato	275.1%
Tomato Puree	270.1%
Stuffing Mixes	263.7%
Ready Wet Soup	257.9%
Powdered Milk	257.1%

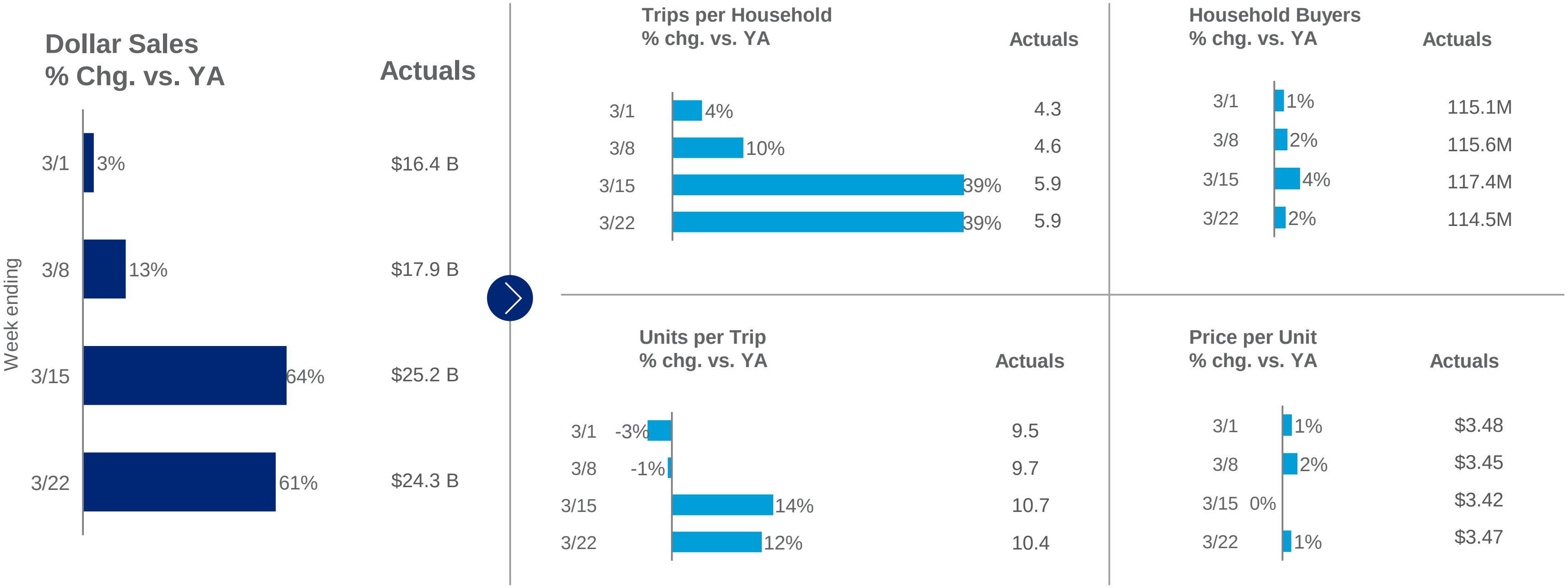
Source: IRI POS Data Week Ending March 22, 2020 vs. Year Ago

deep dive: shopping behavior in the U.S.

Consumers are Making Both More Trips and Larger Baskets in Recent Weeks

United States

Total U.S. All Outlets Consumer Purchasing Dynamics

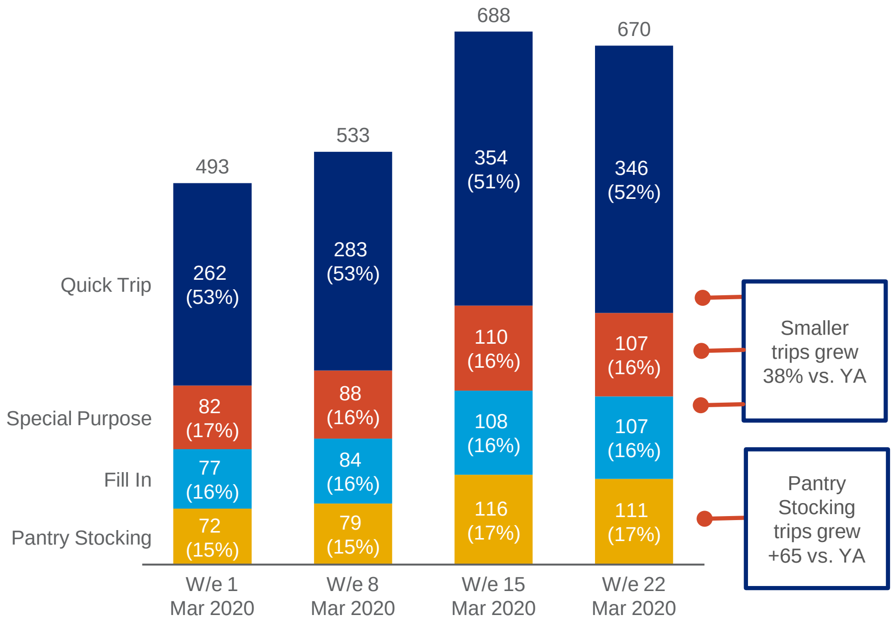


Source: IRI Panel 4 weeks ending March 22, 2020. All Outlets.

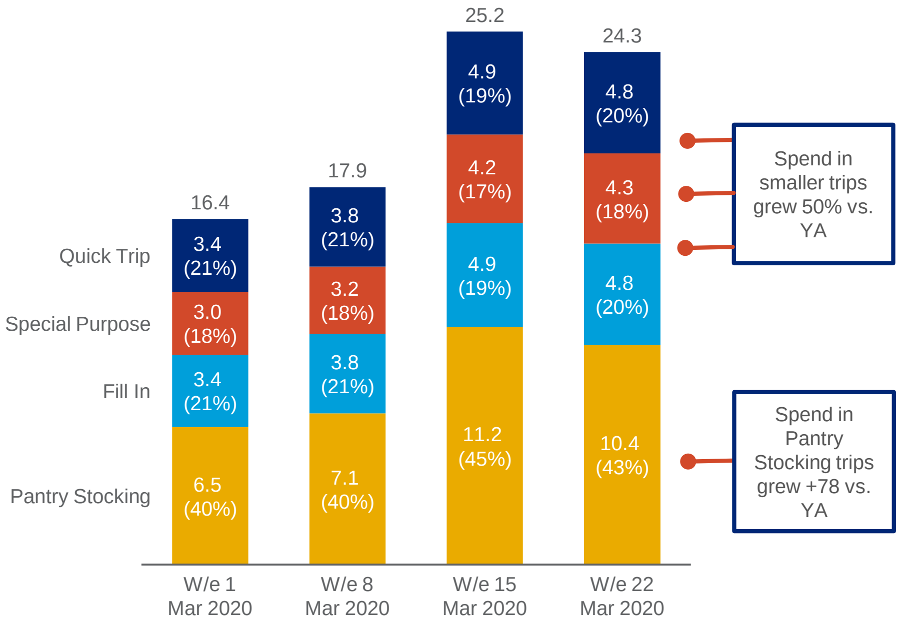
Pantry Stocking Trips Grew Most, but Smaller Trips are Also Growing Significantly vs. Last Year

United States

TRIP COUNT BY TYPE (M)



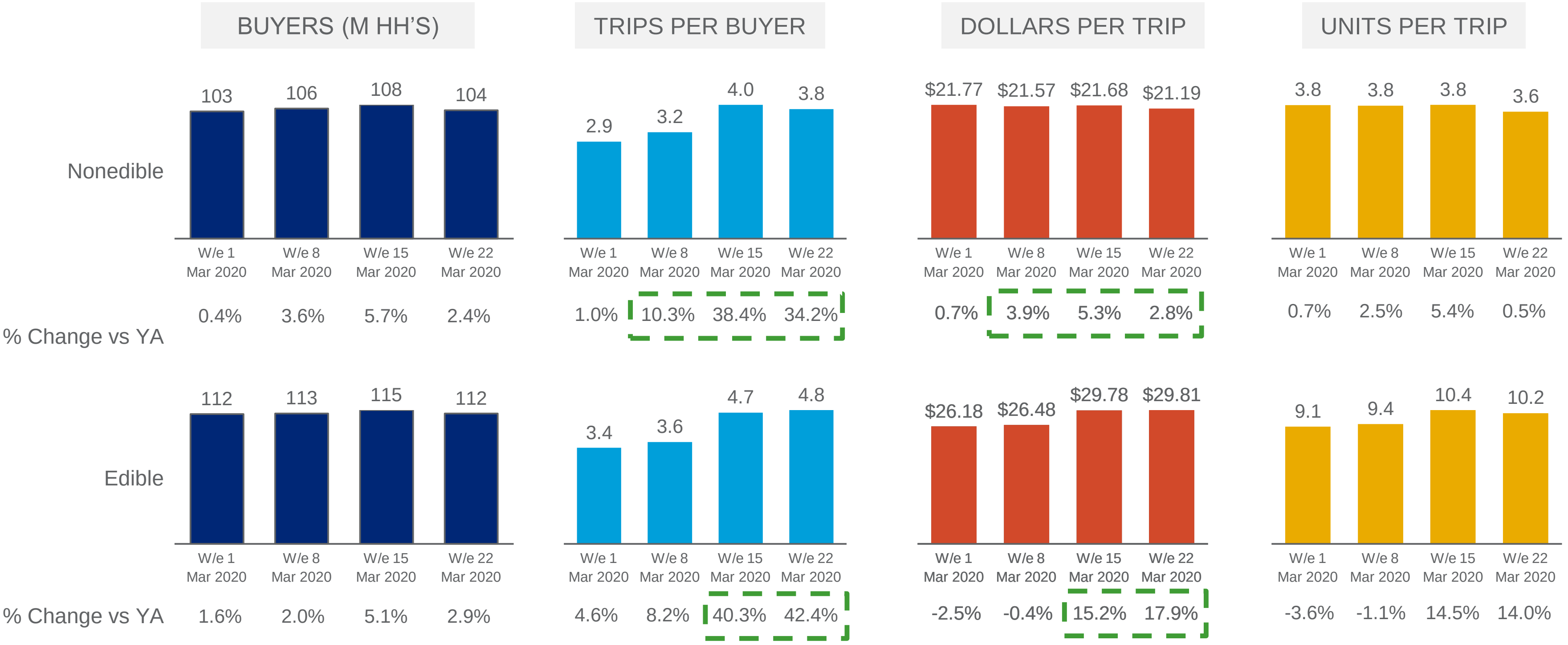
DOLLAR SALES ($B) BY TRIP TYPE



Source: IRI National Consumer Panel 4 weeks ending March 22, 2020. All Outlets.

Consumers Increased Nonedible Purchases Initially Followed by More Edible Spend in Recent Weeks

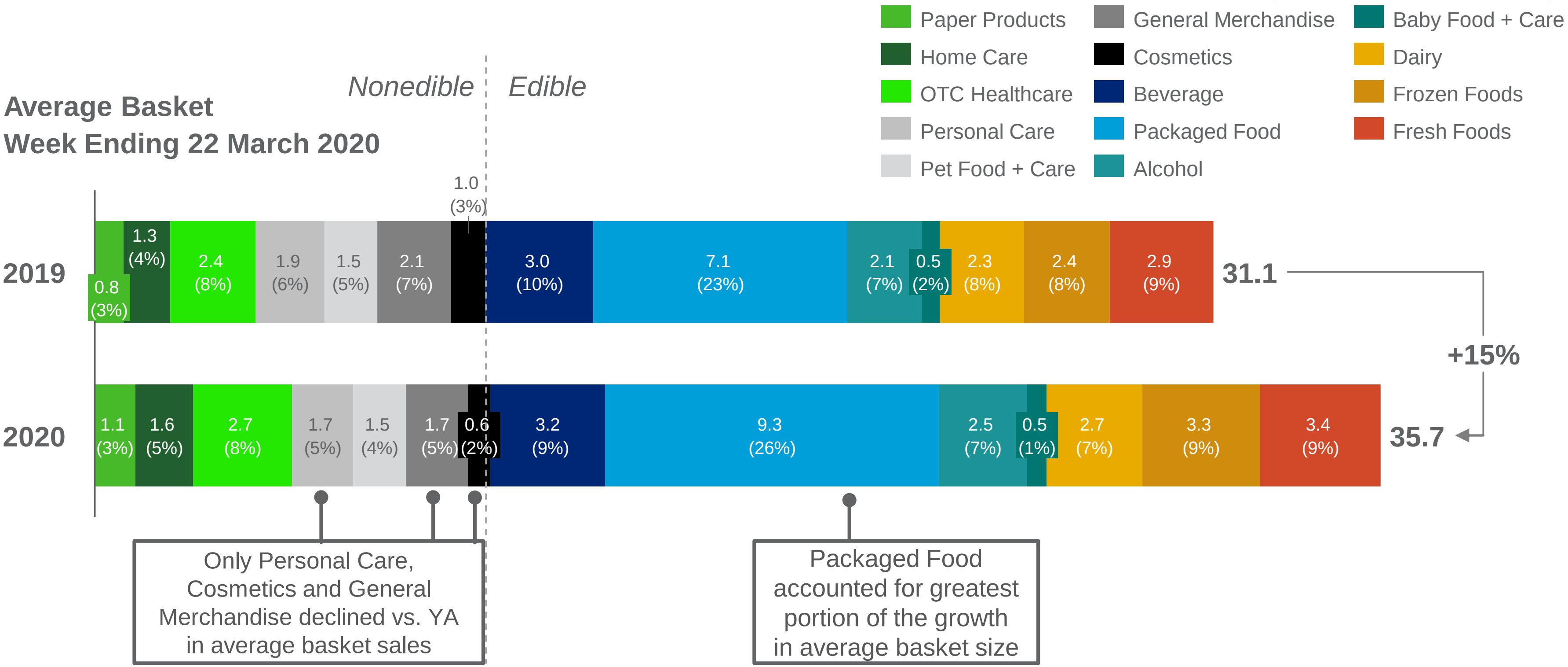
United States



Source: IRI National Consumer Panel 4 weeks ending March 22, 2020. All Outlets.

Packaged Food & Frozen Accounted for a Greater Share of Baskets Post COVID

United States



Source: IRI National Consumer Panel All Outlets data Week Ending 22 Mar 2020 vs year ago

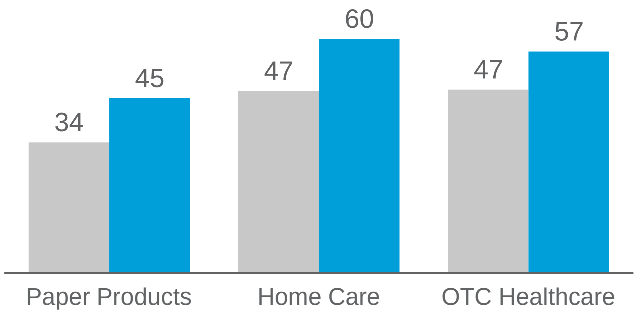
Nonedible: Paper Products, Home Care, OTC Healthcare

United States

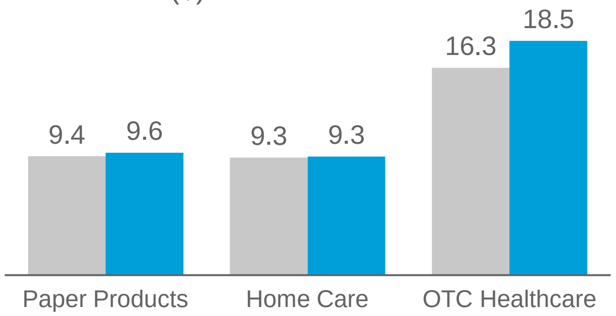
Latest Week Ending March 22, 2020

2019 2020

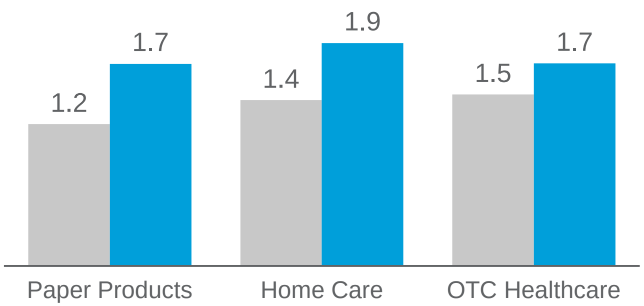
Household Buyers (M)



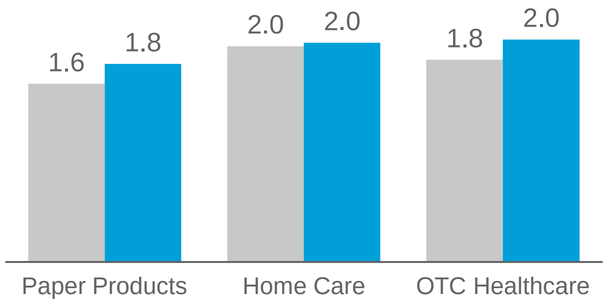
Basket Size ($)



Trips per Buyer



Avg. Units per Trip



Source: IRI Panel All Outlets Data Week Ending 22 March 2020 vs. Year Ago

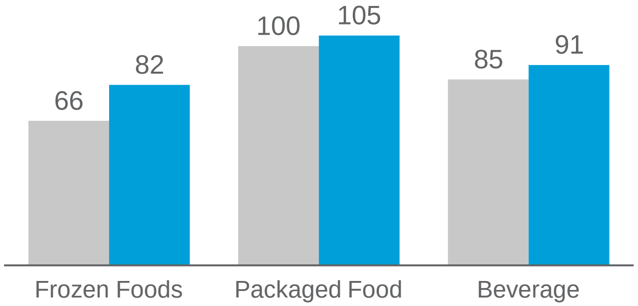
Edible: Packaged Food, Beverages, Frozen Food

United States

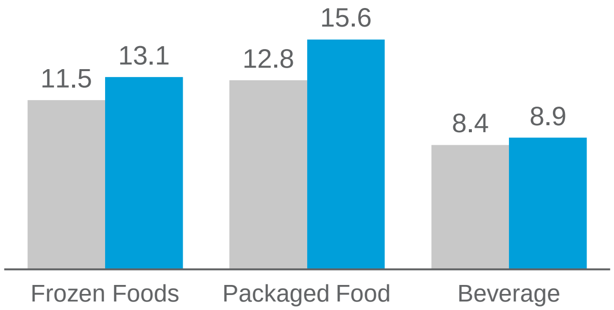
Latest Week Ending March 22, 2020

2019 2020

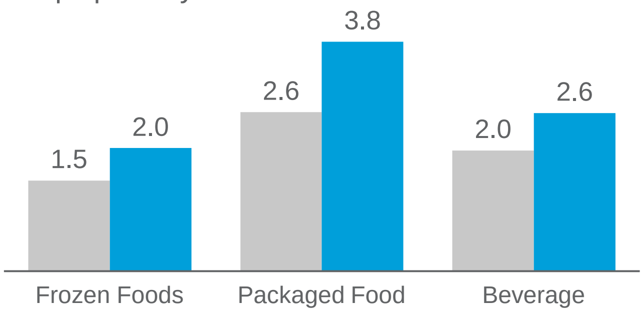
Household Buyers (M)



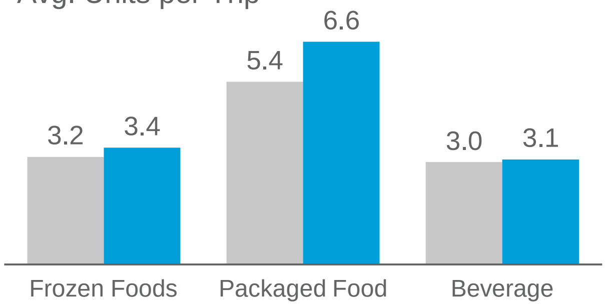
Basket Size ($)



Trips per Buyer



Avg. Units per Trip



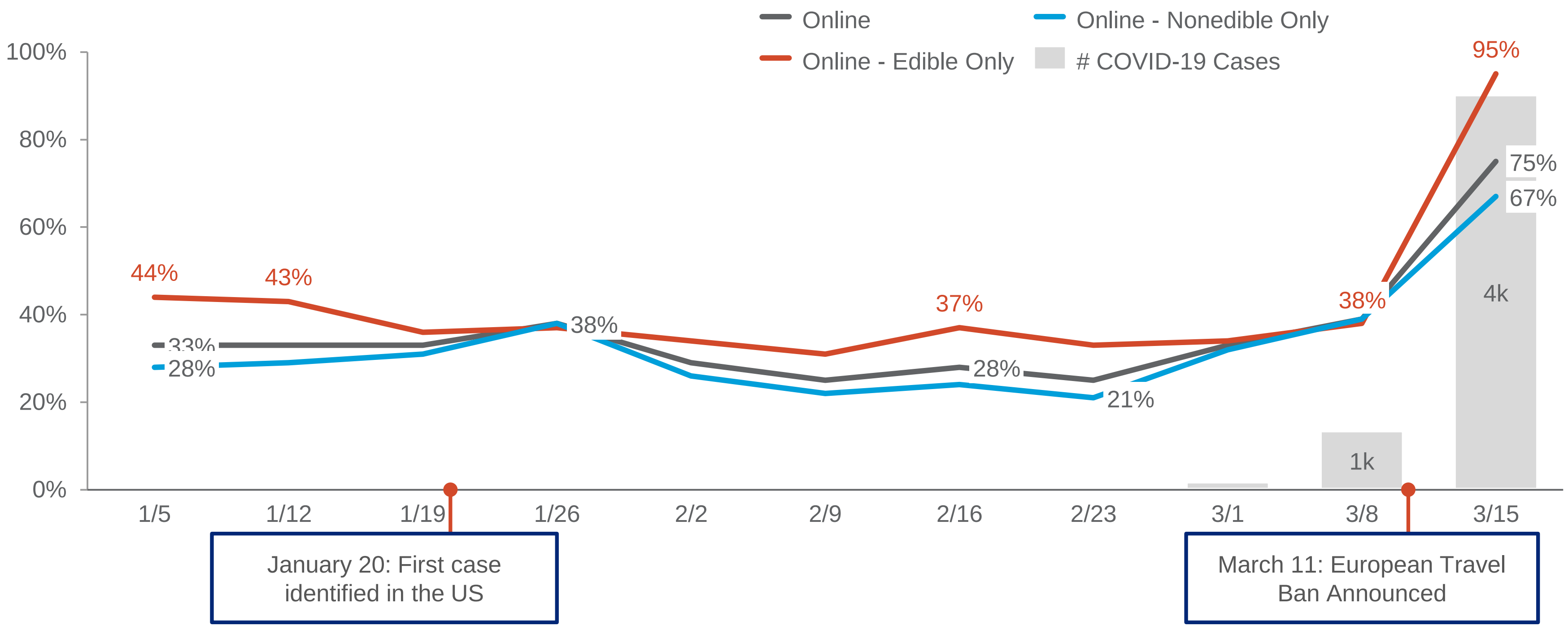
Source: IRI National Consumer Panel All Outlets Data Week Ending 22 March 2020 vs. Year Ago

deep dive:
eCommerce in the U.S.

In the US, Online has Only Seen a Sharp Increase Starting the Week Ending 3/15

United States

Dollar % Change vs YA, Total eCommerce

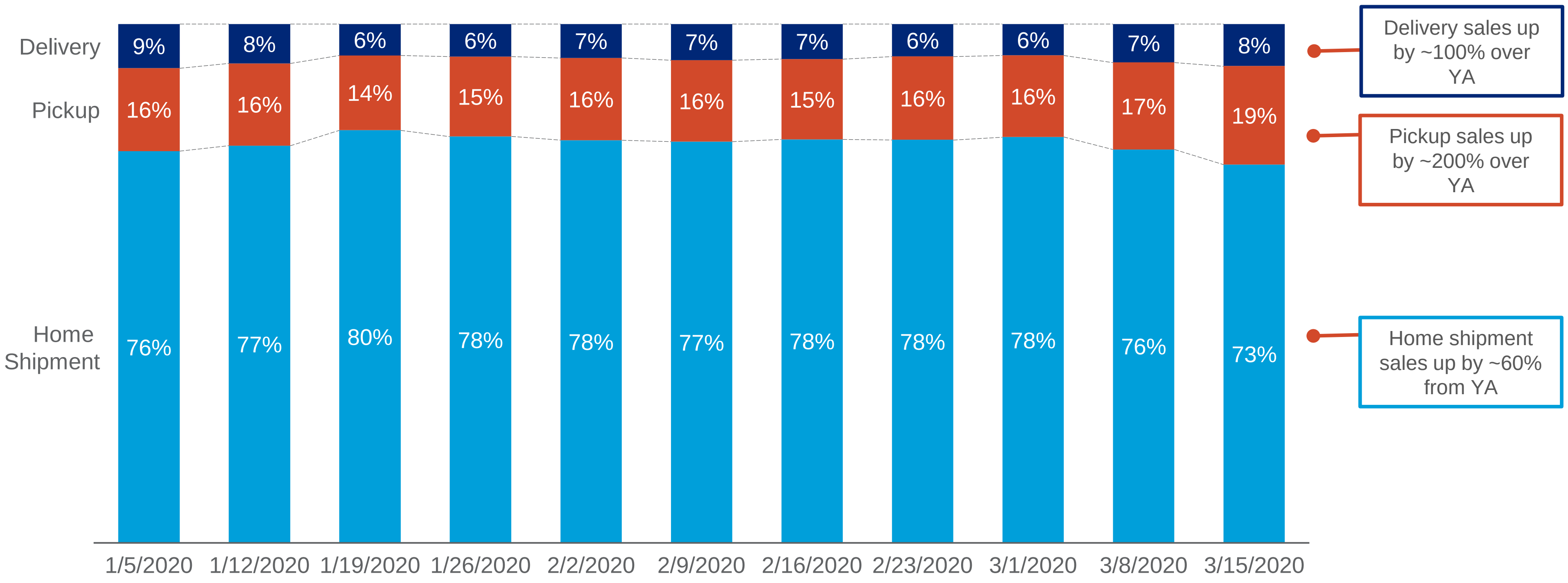


Source: IRI eMarket Insights Model, based on 204 releasable eMarket Insights categories, Baseline is based on L26 Wks Ending 3/22/2020. Case count from Worldometer as of March 31, 2020

Within eCommerce, There is a Slight Shift to Pickup & Delivery Models

United States

Share of CPG eCommerce Dollar Sales by Fulfillment Type

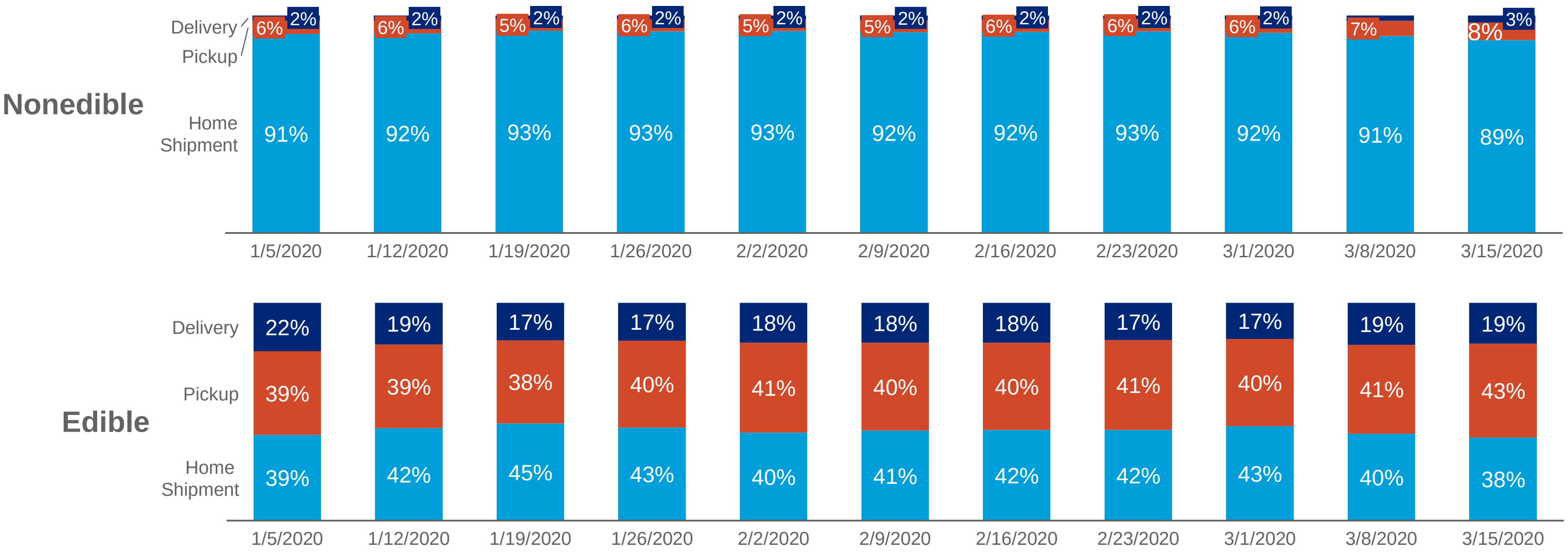


Source: IRI eMarket Insights, based on 204 releasable eMarket Insights categories and retailers where fulfillment can be determined.

Edible Continues to Have a Much Higher Proportion of Pickup and Delivery

United States

Share of eCommerce Dollar Sales by Fulfillment Type

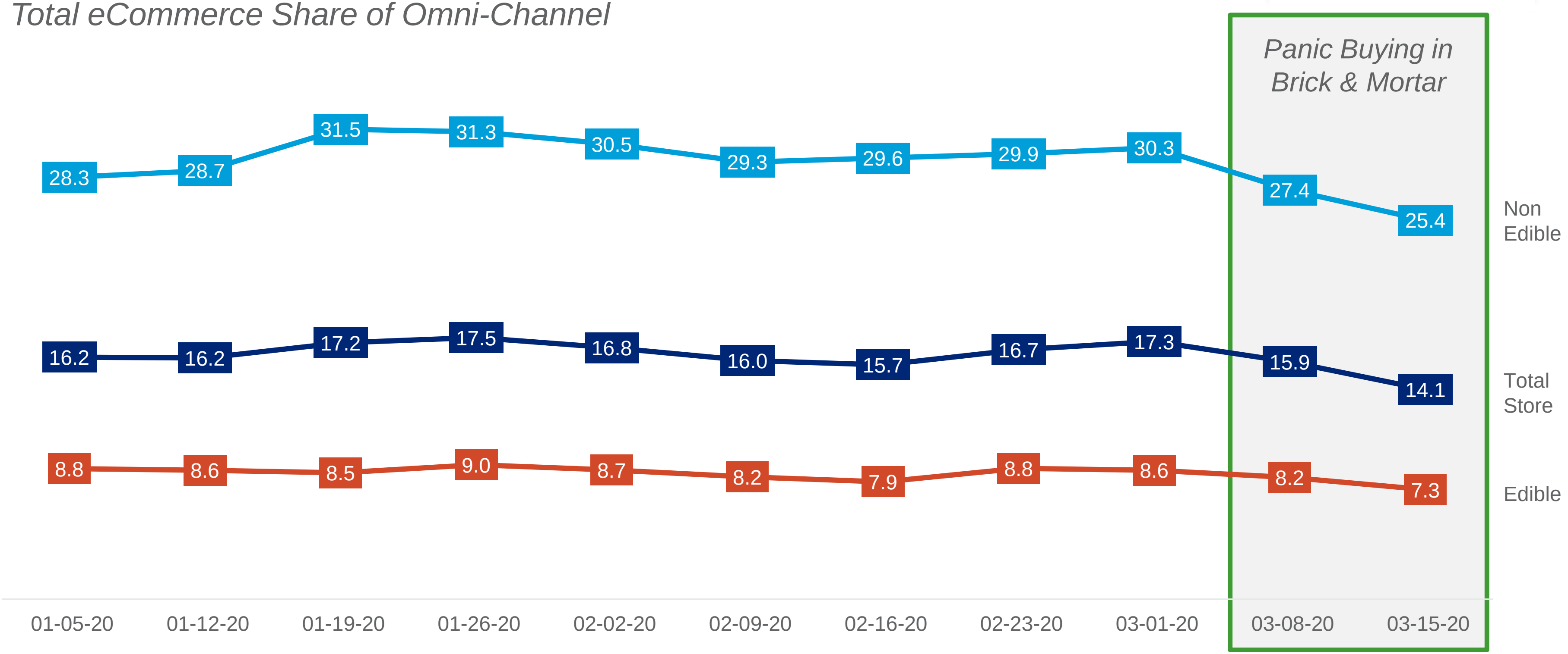


Source: IRI eMarket Insights, based on 204 releasable eMarket Insights categories and retailers where fulfillment can be determined.

While eCommerce Sales Have Grown Over the Past Few Weeks, eCommerce's Share of Omni-Channel Sales is Slightly Decreasing

United States

Total eCommerce Share of Omni-Channel

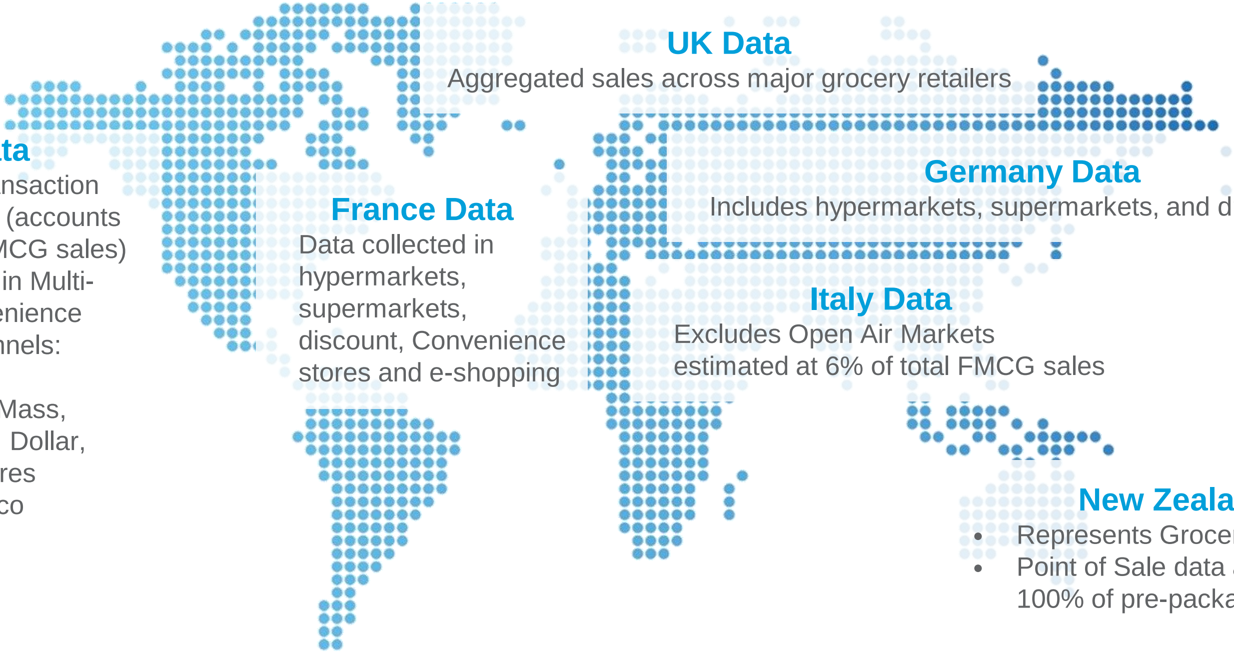


Source: IRI eMarket Insights, based on 204 releasable eMarket Insights categories, Omni-Channel = Total U.S. Multi Outlet + Total eCommerce

appendix

Data Methodology and Notes

IRI tracks POS data weekly (weeks end on Sundays) and has ~one week of required processing time (ecommerce has ~2 weeks processing time). U.S. National Consumer Panel data is released monthly. Tracker will be released weekly on Wednesday / Thursday as data is available; deep dives will be refreshed periodically.



U.S. Data

- Represents transaction POS database (accounts for 80%+ of FMCG sales)
- Data collected in Multi-Outlet + Convenience (MULOC) channels: Grocery, Drug, Convenience, Mass, Walmart, Club, Dollar, and DECA Stores
- Excludes Costco

France Data

Data collected in hypermarkets, supermarkets, discount, Convenience stores and e-shopping

UK Data

Aggregated sales across major grocery retailers

Germany Data

Includes hypermarkets, supermarkets, and drug stores

Italy Data

Excludes Open Air Markets estimated at 6% of total FMCG sales

New Zealand Data

- Represents Grocery channel
- Point of Sale data accounting for 100% of pre-packaged Grocery sales

Largest Sub-Categories – Nonedible

(Based on Prior 52 Week Sales)

Italy

Group	Dept	% Chg
Paper Products	Hygienic Products/ Toilet Paper	34.5%
Paper Products	Disposable / Kitchen Rolls	51.0%
Paper Products	Disposable / Napkins	19.2%
Home Care	Laundry - Washing Machine Detergents	2.1%
Home Care	Disposable / Table Accessories	-6.9%
Home Care	Fabric Softeners	3.5%
Home Care	Small Surfaces Detergents	80.7%
Home Care	Dishwasher Detergent	45.5%
OTC Healthcare	Parapharma / First Aid Medication	36.2%
OTC Healthcare	Parapharma / Other	18.2%
OTC Healthcare	Parapharma / Diagnostic	49.8%

Group	Dept	% Chg
Personal Care	Oral Hygiene / Toothpaste	4.3%
Personal Care	Personal Hygiene / Bath & Shower Gel	2.5%
Personal Care	Personal Hygiene / Deodorants	-31.0%
Pet Food + Care	Pet Care Cats - Nutrition	8.2%
Pet Food + Care	Pet Care Dog - Nutrition	8.9%
Pet Food + Care	Pet Care Cats - Litters	22.6%
Gen Merch	Cell Phones And Accessories	-32.2%
Gen Merch	Books/Magazines/Newspapers	-22.4%
Gen Merch	Toys	-49.4%
Cosmetics	Hair Shampoo	3.3%
Cosmetics	Hair Coloring	75.3%
Cosmetics	Hair Conditioner	-4.9%

Source: IRI POS Data Week Ending March 22, 2020 2020 vs. Year Ago

Largest Sub-Categories – Edible
(Based on Prior 52 Week Sales)

Italy

Group	Dept	% Chg
Beverage	Still Water	-3.2%
Beverage	Coffee Grounds	25.9%
Beverage	Cola	3.3%
Beverage	Tea	-12.3%
Beverage	Natural Sparkling Water	1.5%
Packaged Food	Tuna In Oil	34.3%
Packaged Food	Bakery Snacks	4.0%
Packaged Food	Pasta	21.4%
Packaged Food	Extra Virgin Olive Oil	6.2%
Packaged Food	Sweet Snacks	-12.6%
Alcohol	Beer	11.8%
Alcohol	Wine - Italian DOC	13.7%
Alcohol	Wine - Italian IGT	13.7%
Alcohol	Dark Liquor	-3.8%

Group	Dept	% Chg
Baby Care	Biscuits	14.8%
Baby Care	Baby Care / Diapers	-4.0%
Baby Care	Homogenized Baby Food	7.0%
Dairy	Aged Cheese	13.9%
Dairy	Milk (Ultra High Temperature Pasteurized)	37.2%
Dairy	Mozzarella Cheese	48.8%
Dairy	Fresh Milk	-1.8%
Dairy	Parmesan Cheese	34.4%
Frozen Foods	Natural Vegetables & Fruits	43.1%
Frozen Foods	Multipack Ice Creams	22.3%
Frozen Foods	Natural Fish	48.5%
Fresh Foods	Red Meat	15.1%
Fresh Foods	Sliced Cold Cuts	27.5%
Fresh Foods	Fish	-23.5%

Source: IRI POS Data Week Ending March 22, 2020 2020 vs. Year Ago

Largest Sub-Categories – Nonedible
(Based on Prior 52 Week Sales)

France

Group	Dept	% Chg
Paper Products	Toilet Paper	97.2%
Paper Products	All-purpose Paper Towels	106.0%
Paper Products	Tissues And Paper	87.8%
Home Care	Laundry Detergent	64.6%
Home Care	Multipurpose Household Cleaners	119.2%
Home Care	Garbage Bags	74.2%
Home Care	Machine Dishwasher Detergent	73.9%
Home Care	Hand Dishwasher Detergent	78.9%
OTC Healthcare	Parapharmacy Accessories	46.9%
OTC Healthcare	Dietary Supplements	-17.4%
OTC Healthcare	Weight Loss Products	-7.7%

Group	Dept	% Chg
Personal Care	Shower Gels	9.3%
Personal Care	Toothpaste	13.8%
Personal Care	Deodorant	-23.4%
Pet Food + Care	Wet Cat Food	36.9%
Pet Food + Care	Dry Cat Food	67.6%
Pet Food + Care	Dry Dog Food	67.4%
Cosmetics	Cosmetics	-64.8%

Source: IRI POS Data Week Ending March 22, 2020 2020 vs. Year Ago

Largest Sub-Categories – Edible
(Based on Prior 52 Week Sales)

France

Group	Dept	% Chg
Beverage	Natural Mineral Water	32.2%
Beverage	Fruit Juice	19.6%
Beverage	Colas	14.2%
Beverage	Coffee Pods	28.5%
Beverage	Roasted Coffee	55.1%
Packaged Food	Chocolate Bars	42.4%
Packaged Food	Chocolate Confectionery	4.0%
Packaged Food	Baked Goods	26.1%
Packaged Food	Cooking Oil	82.6%
Packaged Food	Single Serve Pastry	16.6%
Alcohol	Whiskey	0.4%
Alcohol	Specialty Blonde Beers	6.7%
Alcohol	Specialty Beers	20.2%
Alcohol	Anise	5.0%

Group	Dept	% Chg
Baby Care	Diapers	38.4%
Baby Care	Baby Food	22.1%
Baby Care	Milk For Baby	51.3%
Dairy	Yogurt	19.3%
Dairy	Milk	70.1%
Dairy	Hard Cheese	49.8%
Dairy	Butter	58.5%
Dairy	Fresh Cream	51.2%
Frozen Foods	Single Serve Ice Cream	17.7%
Frozen Foods	Frozen Meat	120.7%
Frozen Foods	Frozen Fish	119.2%
Fresh Foods	Fresh Desserts	11.2%
Fresh Foods	Cooked Ham	47.1%
Fresh Foods	Eggs	54.2%

Source: IRI POS Data Week Ending March 22, 2020 2020 vs. Year Ago

Largest Sub-Categories – Nonedible
(Based on Prior 52 Week Sales)

Germany

Group	Dept	% Chg
Paper Products	Dry Toilet Paper	86.1%
Paper Products	Kitchen Rolls	92.5%
Paper Products	Tissues	162.5%
Home Care	Heavy Duty Detergents	82.9%
Home Care	Machine Dishwasher Detergent	115.8%
Home Care	Fabric Softener	37.6%
Home Care	Toilet Rim Block	61.4%
Home Care	All Purpose Cleaner	70.0%
OTC Healthcare	Cold Medicine	91.6%
OTC Healthcare	Dry Mineral Products	51.0%
OTC Healthcare	Dry Vitamin Products	72.2%

Group	Dept	% Chg
Personal Care	Face Care	1.3%
Personal Care	Shampoo	35.8%
Personal Care	Toothpaste	52.4%
Pet Food + Care	Wet Cat Food	41.9%
Pet Food + Care	Dry Dog Food	38.1%
Pet Food + Care	Dry Cat Food	34.5%
Gen Merch	Phone Cards	24.2%
Gen Merch	Air Freshener	2.6%
Gen Merch	Household / Garbage Bags	69.4%
Cosmetics	Eye Make Up	-35.0%
Cosmetics	Face Make Up	-34.5%
Cosmetics	Hair Coloring	45.7%

Source: IRI POS Data Week Ending March 22, 2020 2020 vs. Year Ago

Largest Sub-Categories – Edible
(Based on Prior 52 Week Sales)

Germany

Group	Dept	% Chg
Beverage	Fruit Juice	31.4%
Beverage	Sports Beverages	13.0%
Beverage	Lemonade	8.1%
Beverage	Water With Additives	3.0%
Beverage	Instant Coffee	66.9%
Packaged Food	Chocolate Bars	21.6%
Packaged Food	Nuts / Kernels / Trail Mix	39.2%
Packaged Food	Candies / Confectionaries	-6.0%
Packaged Food	Sausages In Aspic (Shelf Stable)	100.8%
Packaged Food	Chocolate Bar / Nuts Bar	26.4%
Alcohol	Beer / Nonalcoholic Beer	23.9%
Alcohol	Wine	23.8%
Alcohol	Clear Schnapps	22.0%
Alcohol	Liquor	8.8%

Group	Dept	% Chg
Baby Care	Baby Diapers	-19.2%
Baby Care	Liquid/Dry Baby Nutrition With/Without Milk	28.8%
Baby Care	Baby - Cleansing Tissues	62.9%
Dairy	Cheese	39.0%
Dairy	Firm Yogurt	20.7%
Dairy	Butter / Butter Preparations	23.7%
Dairy	Eggs	40.0%
Dairy	Homogenized Milk	64.5%
Frozen Foods	Frozen Pizza / Baguette / Flavored Dough Products	48.1%
Frozen Foods	Frozen Dishes	66.4%
Frozen Foods	Ice Cream	6.5%
Fresh Foods	Chilled Sausages In Aspic	51.9%
Fresh Foods	Ready To Eat Desserts	15.4%
Fresh Foods	Chilled Salads	10.0%

Source: IRI POS Data Week Ending March 22, 2020 2020 vs. Year Ago

Largest Sub-Categories – Nonedible

(Based on Prior 52 Week Sales)

New Zealand

Group	Dept	% Chg
Paper Products	Toilet Tissue - Premium Toilet	229.6%
Paper Products	Toilet Tissue - Economy Toilet	176.8%
Paper Products	Paper Towels - Premium Towel	157.0%
Home Care	Laundry Detergent - Powder	118.5%
Home Care	Machine Dishwasher Detergent	162.2%
Home Care	Hand Dishwasher Detergent	157.2%
Home Care	Household Cleaners - All Purpose	217.8%
Home Care	Laundry Detergent - Liquid	151.7%
OTC Healthcare	Feminine Hygiene - Incontinence	92.0%
OTC Healthcare	Respiratory Tract - Cough / Cold	289.6%
OTC Healthcare	Feminine Hygiene - Tampons	178.0%
OTC Healthcare	Sun Care - Sunscreen	-31.7%
OTC Healthcare	Analgesics - Paracetamol	319.0%

Group	Dept	% Chg
Personal Care	Facial Skincare - Facial Moisturizer	32.9%
Personal Care	Hand & Body Skincare - H&B Body Moisturizer	75.7%
Personal Care	Mouthwash	105.4%
Pet Food + Care	Wet Cat Food	67.2%
Pet Food + Care	Dry Cat Food	103.7%
Pet Food + Care	Pet Snacks & Treats	48.1%
Gen Merch	Prepaid Service - Gift Cards	13.3%
Gen Merch	Plastic Bags, Wraps, Foils	43.0%
Gen Merch	Prepaid Service - Rechargable Card	-4.6%
Cosmetics	Personal Wash - Shower Gels	93.5%
Cosmetics	Hair Coloring - Permanent	47.4%
Cosmetics	Personal Wash - Bar Soaps	289.0%

Source: IRI POS Data Week Ending March 22, 2020 2020 vs. Year Ago

Largest Sub-Categories – Edible
(Based on Prior 52 Week Sales)

New Zealand

Group	Dept	% Chg
Beverage	Lifestyle Drinks - Energy Drinks	7.7%
Beverage	Carbonated Beverages - Cola Single	12.7%
Beverage	Carbonated Beverages - Cola Multipack	5.3%
Beverage	Water – Still Water	54.9%
Beverage	Juice/Drinks - Juice Multiserve	21.1%
Packaged Food	Confectionery – Chocolate Blocks	30.9%
Packaged Food	Snack Foods – Potato Products	50.8%
Packaged Food	Nuts - Snacking Nuts	51.2%
Packaged Food	Biscuits - Crackers	69.0%
Packaged Food	Biscuits - Coated	23.7%
Alcohol	Beer - Premium Beer	13.8%
Alcohol	Wine - Sauvignon Blanc	27.9%
Alcohol	Beer - Mainstream Beer	6.8%
Alcohol	Beer - Specialty Beer	10.9%

Group	Dept	% Chg
Baby Care	Baby Food - Formula	45.6%
Baby Care	Nappies - Diapers	90.4%
Baby Care	Baby Needs - Wipes	133.5%
Dairy	Milk & Cream - Std/Homogenized	29.5%
Dairy	Smallgoods Dairy - Prepack Bacon	89.1%
Dairy	Dairy Spreads & Fats - Butter	88.0%
Dairy	Cheese - NAT Block 1kg+	96.8%
Dairy	Eggs - Caged	37.0%
Frozen Foods	Frozen Meat – Value-Added Chicken	120.2%
Frozen Foods	Ice Cream - Thome-regular	12.8%
Frozen Foods	Savories - Fresh Pies	40.8%
Fresh Foods	Bread - Light Grain	49.8%
Fresh Foods	Bread - White	51.6%
Fresh Foods	Bread - Heavy Grain	47.9%

Source: IRI POS Data Week Ending March 22, 2020 2020 vs. Year Ago

Largest Sub-Categories – Nonedible
(Based on Prior 52 Week Sales)

United Kingdom

Group	Dept	% Chg
Paper Products	Household Paper	83.0%
Home Care	Detergents/Laundry	102.6%
Home Care	Household Sundries	35.2%
Home Care	Cleaning Products	111.4%
OTC Healthcare	Medicines	124.3%
OTC Healthcare	Vitamins & Nutrition	111.0%

Group	Dept	% Chg
Personal Care	Haircare	51.8%
Personal Care	Oral Hygiene	71.3%
Personal Care	Deodorants & Personal Wash	132.1%
Pet Food + Care	Pet Food	60.3%
Pet Food + Care	Pet Non Food	34.7%
Gen Merch	Houseware	-12.0%
Gen Merch	Garden & Flowers	116.5%
Gen Merch	Newspapers & Magazines	4.6%
Cosmetics	Cosmetics & Fragrances	-11.3%

Source: IRI POS Data Week Ending March 22, 2020 2020 vs. Year Ago

Largest Sub-Categories – Edible

(Based on Prior 52 Week Sales)

United Kingdom

Group	Dept	% Chg
Beverage	Soft Drinks	30.7%
Beverage	Hot Beverages	82.0%
Packaged Food	Confectionery	21.2%
Packaged Food	Crisps, Snacks & Nuts	32.5%
Packaged Food	Biscuits	46.7%
Packaged Food	Cooking Products	110.0%
Packaged Food	Breakfast Cereals	84.3%
Alcohol	Wine	55.5%
Alcohol	Spirits	68.1%
Alcohol	Beer	58.5%
Alcohol	Cider & Perry	53.0%

Group	Dept	% Chg
Personal Care	Deodorants	33.1%
Personal Care	Toothpaste	64.6%
Personal Care	Liquid Body Wash/All Other	61.3%
Pet Food + Care	Dry Dog Food	56.8%
Pet Food + Care	Dog Biscuits/Treats/Beverages	29.7%
Pet Food + Care	Dog/Cat Needs	-1.5%
Gen Merch	Disposable Plates/Bowls	46.3%
Gen Merch	Household/Kitchen Storage	5.9%
Gen Merch	Garbage/Trash/Lawn&leaf Bags	77.6%
Cosmetics	Regular Shampoo	33.1%
Cosmetics	Hair Conditioner/Creme Rinse	22.8%
Cosmetics	Hair Accessories	-35.0%
Fresh Foods	Vegetables	34.7%

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Source: IRI POS Data Week Ending March 22, 2020 2020 vs. Year Ago

Largest Sub-Categories – Nonedible

(Based on Prior 52 Week Sales)

United States

Group	Dept	% Chg
Paper Products	Toilet Tissue	92.3%
Paper Products	Paper Towels	97.7%
Paper Products	Facial Tissue	128.4%
Home Care	Liquid Laundry Detergent	77.3%
Home Care	Cleaning Tools/Mops/Brooms	28.6%
Home Care	Home Air Fresheners	19.6%
Home Care	Manual Dish Detergent	145.3%
Home Care	Other Laundry Detergent (Packet/Bar)	116.7%
OTC Healthcare	Cold/Allergy/Sinus Tablets/Packets	93.4%
OTC Healthcare	Mineral Supplements	29.2%
OTC Healthcare	Weight Control/Nutritionals Liq/Pwd	23.5%
OTC Healthcare	Internal Analgesic Tablets	123.2%
OTC Healthcare	Antacid Tablets	31.0%

Group	Dept	% Chg
PERSONAL CARE	DEODORANTS	33.1%
PERSONAL CARE	TOOTHPASTE	64.6%
PERSONAL CARE	LIQUID BODY WASH/ALL OTHER	61.3%
PET FOOD + CARE	DRY DOG FOOD	56.8%
PET FOOD + CARE	DOG BISCUITS/TREATS/BEVERAGES	29.7%
PET FOOD + CARE	DOG/CAT NEEDS	-1.5%
GEN MERCH	DISPOSABLE PLATES/BOWLS	46.3%
GEN MERCH	HOUSEHOLD/KITCHEN STORAGE	5.9%
GEN MERCH	GARBAGE/TRASH/LAWN&LEAF BAGS	77.6%
COSMETICS	REGULAR SHAMPOO	33.1%
COSMETICS	HAIR CONDITIONER/CREME RINSE	22.8%
COSMETICS	HAIR ACCESSORIES	-35.0%

Source: IRI POS Data Week Ending March 22, 2020 2020 vs. Year Ago

Largest Sub-Categories – Edible
(Based on Prior 52 Week Sales)

United States

Group	Dept	% Chg
Beverage	Regular Soft Drinks	19.5%
Beverage	Convenience/Pet Still Water	36.5%
Beverage	Ss Energy Drinks Non-aseptic	-3.3%
Beverage	Low Calorie Soft Drinks	28.1%
Beverage	Ss Sports Drinks Non-aseptic	29.9%
Packaged Food	Cookies	46.8%
Packaged Food	Ready-to-eat Cereal	80.5%
Packaged Food	Potato Chips	39.3%
Packaged Food	Tortilla/Tostada Chips	53.1%
Packaged Food	All Other Crackers	62.7%
Alcohol	Domestic Beer/Ale (Inc Non-alcoholic)	33.2%
Alcohol	Domestic Table/Still Wine	45.5%
Alcohol	Imported Beer/Ale (Inc Non-alcoholic)	27.5%
Alcohol	Spirits	62.8%

Group	Dept	% Chg
Baby Care	Disposable Diaper	74.5%
Baby Care	Baby Wipes	127.8%
Baby Care	Disposable Training Pants	58.3%
Dairy	Rfg Skim/Lowfat Milk	42.6%
Dairy	Rfg Yogurt	21.4%
Dairy	Fresh Eggs	71.8%
Dairy	Natural Cheese-shredded	88.5%
Dairy	Rfg Whole Milk	48.5%
Frozen Foods	Ice Cream	44.7%
Frozen Foods	Frozen Pizza	140.2%
Frozen Foods	Frozen Novelties	33.3%
Fresh Foods	Fresh Bread	61.7%
Fresh Foods	Rfg Uncooked Meats (No Poultry)	85.3%
Fresh Foods	Rfg Sliced Lunchmeat	86.7%

Source: IRI POS Data Week Ending March 22, 2020 2020 vs. Year Ago

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