

COVID-19 TRENDS

COVID-19 RETAIL TIMELINE



PHASE 1
February 23

PROACTIVE WELL-BEING

Shoppers prepare immune systems by stocking up on vitamins, supplements, herbs & homeopathic medications.



PHASE 2
March 15-22

PANTRY LOADING

As confirmed cases skyrocketed, consumers pantry load on Edible & Non-Edible products to prepare for quarantine.



PHASE 3
March 29-Current

QUARANTINE LIVING

Kitchen pantries reach capacity and consumers decrease shopping trips. New buying patterns emerge as consumers are stuck at home.



PHASE 4
TBD

A NEW NORMAL

With shifts in consumer shopping and spending, what will the future of retail look like as states begin lifting stay at home orders?

COVID-19 CONSUMER SHIFTS

FASTEST GROWTH DEPARTMENTS & CATEGORIES BY PHASE

As consumers react to the virus with behavioral shifts, they demand products that address their specific need states.



PHASE 1
WE 02.23.20

Vitamins & Supplements
Herbs & Homeopathic
OTC Medicines
Antiseptics

PHASE 2
WE 03.15.20

General Merchandise
Frozen Department
Grocery Department
OTC Medicines
Alcohol

PHASE 3
WE 04.12.20 (3rd Wk)

Frozen Juice & Beverages
SS Baking Mix
First Aid (incl Antiseptics)
Frozen Fruits & Vegetables
SS Soup

PHASE 4
TBD

Insights to be determined as we identify this new phase and continue to track changing consumer behavior through these unprecedented times.



COVID-19 THEMES



Treat Me¹

Phase 3

Consumers are coping with quarantine by indulging in comfort products, like alcohol, desserts, coffee, and candy, during these stressful times.

+33%	Frozen Desserts
+12%	SS Candy
+42%	SS Cookies & Snack Bars
+44%	Wine



Center Store²

Phase 2 & 3

Consumers demanded more non-perishable pantry staples with the grocery department growing +30pts faster than refrigerated week ending 3.22.

+62%	Grocery Department
+39%	Refrigerated Department
+84%	SS Plant Based Milk
+52%	RF Plant Based Milk



You Are My Density³

Phase 2 & 3

Consumers are stockpiling more nutrient-dense foods like eggs, beans, nuts to make more nutritious meals for their families.

+114%	SS Beans
+83%	SS Rice Dry
+77%	RF Eggs Liquid
+63%	RF Eggs



Gut Health⁴

Phase 1 & 2

Demand continues for gut health segments which deliver overall immunity benefits as consumers defend against the virus.

+39%	Yogurt
+29%	Cottage Cheese
+28%	RF Kombucha
+23%	RF Juice & Func Bev



Seeking Supplements⁵

Phase 1 & 2

Elderberry and Vitamin C experienced a large influx of sales across channels as consumers seek immunity boosters to increase their overall health.

+100%	Elderberry
+18%	Vitamin C (Ester C)
+193%	Elderberry
+37%	Vitamin C (Ester C)



Protein Power⁶

Phase 2 & 3

All forms of proteins are in demand. Consumers demand nutritious proteins for homemade recipes. Plant Based Protein mirrored traditional proteins in trend.

+106%	RF Plant Based Meat
+86%	FZ/RF Meat, Poultry, Seafood
+167%	RF Plant Based Meat
+76%	FZ/RF Meat, Poultry, Seafood



Better for You & Planet⁷

Phase 2

Consumers continue to make more mindful choices at the shelf during the pandemic including plant based, grain free, organic, and animal welfare products.

+89%	Plant Based
+49%	Organic
+81%	Animal Welfare
+164%	Grain Free



Stress Baking Boom⁸

Phase 2 & 3

Demand for baking products rise as people have more time to bake at home and cope with comfort foods. Creative types are baking from scratch while those looking for a bit of convenience are buying mixes.

+68%	SS Baking Ingredients
+92%	SS Baking Mixes
+116%	SS Flours
+127%	SS Pancake & Flour Mix



Stay at Home Spa Day⁹

Phase 2 & 3

As salons and other self-care services shut their doors, consumers bought products for DIY hair care & skin treatments and are looking for stress-relief from aromatherapy oils.

+104%	Hair & Scalp Treatment
+54%	Essential Oils
+53%	Shampoo
+52%	Body Lotion