KEY LEARNINGS IN FRESH FOODS IN THE ERA OF COVID-19

Hosted with thought leadership from FMI associate member

April 30, 2020
Today’s Speakers

Rick Stein, Vice President, Fresh, FMI
Sally Lyons Wyatt, EVP, IRI Center-of-Store & Produce Vertical
Jonna Parker, Principal, IRI Fresh Center of Excellence
FMI ANTITRUST COMPLIANCE

◆ It is FMI policy to comply in all respects with the antitrust laws.

◆ All participants in FMI meetings and events are expected to comply with applicable antitrust and competition laws.

◆ Avoid discussions of sensitive topics that can create antitrust concerns.
  - Agreements to fix prices, allocate markets, engage in product boycotts and to refuse to deal with third parties are illegal.
  - Discussions of prices (including elements of prices such as allowances and credit terms), quality ratings of suppliers, and discussions that may cause a competitor to cease purchasing from a particular supplier, or selling to a particular customer, should be avoided.
  - No discussion that might be interpreted as a dividing up of territories.

◆ It is important to avoid even the appearance of unlawful activity.

◆ Questions or concerns? Please consult with FMI staff.
As the **food industry association**, FMI works with and on behalf of the entire industry to advance a **safer**, **healthier** and **more efficient** consumer food supply.

FMI brings together a wide range of members across the value chain — from **retailers** who sell to **consumers**, to **producers** who supply the food, as well as the wide-variety of companies providing critical services — to **amplify** the collective work of the industry.
Tackling Emerging Issues

FMI identified five major categories of Emerging Issues through the detailed review of the industry.
Strategic Plan – Value Proposition

Focused offer around value proposition
Distinct from the plan, an updated communication of the value proposition will benefit members and other stakeholders.

Refining and designing the precise communication will be critical to the future rebranding effort.
FMI Fresh Community

FMI Fresh Executive Committee- (FEC) Primary Members

FMI Fresh Foods Leadership Council- (FFLC) Primary Members and Assoc. Members combined

Seafood Strategy Committee- (SSC) Primary Members

Seafood Strategy Leadership Council- (SSLC) Primary Members and Assoc. Members combined

- Both groups meet 2x per year
- Seafood additional quarterly calls 2x per year
- Group email communications
- Individual calls on-going
FMI Fresh Executive Committee (FEC)

John Ruane (Chair)
Ahold USA

Alex Corbishley (Co-Chair)
Target

Tom DeVries
Giant Eagle, Inc.

John Beretta
Albertsons, LLC

Dave Bornmann
Publix Super Markets, Inc.

Scott Bradley
Target Corporation

Alex Corbishley
Target Corporation

Buddy Jones
MDI Distributors

Dan Koch
Associated Wholesale Grocers, Inc.

Nate Stewart
Hy-Vee

John Haggerty
Burris Logistics

Mark Hilton
Harris Teeter LLC

Terry Murphy
Wakefern Food Corporation

Kirk Laboyteaux
Brookshire Grocery Company

Dan Murphy
SuperValu

Pat Pessotto
Longo Brothers Fruit Markets Inc.

Nick Carlino
MDI Distributors

Don Sanderson
Meijer, Inc.

Geoff Waldau
Food Lion

Bob Gleeson
Weis Markets

Marc Lieberman
Walmart

Rick Findlay
Fresh Thyme

Gary York
CH Robinson Fresh

Steve Howard
Bristol Farms/Lazy Acres

Mike Richter
Coborns

Jerry Goldsmith
Spartan Nash

Anthony Sattler
C&S Wholesalers

Pat Brown
Albertsons LLC

Scott Evans
Price Chopper/Mkt 32

Randy Riley
Kroger

Curtis Funk
Lunds Byerly

John Burns
Whole Foods

Greg Hilborn
Loblaws

Adam Almond
Amazon

Nicole Wegman*
Wegmans Food Markets, Inc.

* Silent members
FMI Fresh Foods Leadership Council (FFLC)

John Ruane (Chair)
Ahold USA
Alex Corbishley- (Co-Chair)
Target
All- FEC Members
FMI Fresh Executive Council
Chris Dubois
IRI
Michael Eardley
International Dairy-Deli-Bakery Assoc.
Jason Jerome
National Cattlemans Beef Association
Sarah Schmansky
Nielsen Perishables Group
Paul Mastronardi
Mastronardi Produce
David Sherrod
SE Produce Council
Miriam Wolk
United Fresh Produce Assoc.
Julie Anna Potts
North American Meat Institute
Tom Super
National Chicken Council
Jarrod Sutton
National Pork Board
Joe Watson
Produce Marketing Assoc.
Joe Weber
Smithfield Foods Inc.
Art Yerecic
Yerecic Label
Brad Roche
Hill Phoenix
Rich Rutecky
Hussmann
Robb MacKie
American Bakers Assoc.
Jim Huston
Johnsonville
Chad Gregory
United Egg Producers
Jenny Maloney
Bayer Crop
John Knorr
Phillips Seafood
Kurt Vetter
Wonderful
Jim Randazzo
Aqua Star Seafood
Danny Sweeting
Trident Seafood
Jeff Baker
Hormel Foods
Sally Lyons-Wyatt
IRI
Wendy Reinhardt Kapsak
Produce for Better Health (PBH)
Michael Lang
Invatron
Tom Daniel
Sterilox/Chemstar
Randy Evins
SAP
Tom Windish
Cargill
Shane Faucet
Bimbo Bakeries
Jason Adlam
Chep
Adam Johnson
Ecolab
Maureen Davis
Taylor Farms
Danny Sweeting
Trident
Reminder

If you registered for this webinar, you will receive a link to this recorded presentation by e-mail in 2-3 days, including the Q&A.
Tracking the Dramatic Pivot of U.S. Consumer and Shopper Behavior

KEY LEARNINGS IN FRESH FOODS IN THE ERA OF COVID-19

April 30, 2020
In This Issue of IRI’s COVID-19 Report

To create this report, IRI leveraged data and analytics from various proprietary retail, market, consumer and shopper assets, including:

- IRI Point of Sale Data, including Fresh data
- IRI E-Market Insights®
- Shopper Basket Analysis from National Consumer Panel
- IRI Surveys Analyzed by: IRI Proprietary Nutrilink® Segmentation and IRI EconoLink® Segmentation

Visit IRI’s COVID-19 Insights Portal and COVID-19 Dashboard for more reports and updates.

IRI conducts weekly consumer surveys among primary grocery shoppers aged 18+, representative of the U.S. population.
what we have learned about food & beverage over the past two months
The COVID-19 Pandemic Affected Consumer F&B Mindset with Long Lasting Impact

What Shoppers Are Telling Us...

61% think the crisis will last 2-6 more months

59% are now preparing 91-100% of all meals at home – with only 8% preparing 50% or less

18% of shoppers said they plan to buy more fresh foods – consistent across the pandemic

Source: IRI COVID19 Weekly survey of primary shoppers, as of Wave 5, week ending 4/10-4/12
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The Coronavirus Pandemic: An Unprecedented Event Impacting the Food Industry

*What We Saw in the Sales Performance*

**early March to mid-April**

Shelf-Stable and Frozen departments were destinations Resulting in +5 Share Points in Total Store for F&B

Fresh Foods regained typical share of store with growth trajectory increasing in WE 4/12 compared to late March, especially in Meat, Produce

**week ending 3/15 & 3/22**

Focused on Stocking Up with Food with Baking Ingredients, Meal Making Components, Dairy Driving Trends

**early April**

Service departments like Deli Prepared, In-Store Bakery, Floral are challenged by staffing shortages, food service restrictions and consumer wariness

**week ending 3/15/2020**

MULO Topped $25B

**March**

- w/e 3.8.20
- w/e 3.15.20
- w/e 3.22.20
- w/e 3.29.20
- w/e 4.5.20
- w/e 4.12.20
- w/e 4.19.20

**April**

- w/e 3.15.20
- w/e 3.22.20
- w/e 3.29.20
- w/e 4.5.20
- w/e 4.12.20
- w/e 4.19.20
After an Unprecedented Mid-March Peak in Pandemic Buying, Sales Remain Elevated Year Over Year with Other Food Outpacing Fresh Growth

Dollar % Chg. vs. YA // Total U.S. MULO // Total Store Including Both Fixed and Random-Weight

52 weeks ending Feb 2020 benchmarks
F&B ex Fresh: +1.7%
Fresh Foods: +1.3%
Non-Edibles: +1.4%

Weekly data from March 03-09, 2020 shows a significant increase in sales across all product categories.

March 12
Dow Jones drops more than 10%, the biggest drop since 1987

March 13
CPG retail sales were 53% higher than the highest day in 2019

April 15
~500,000 have recovered from COVID-19

Source: IRI TSV+ Perimeter Model
Note: Data reflected does not include Costco or Total eComm
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Changes Consumers Made to Eating Habits Will Continue After the Crisis Abates

**65%**  
Eating at Home More Often Instead of at Restaurants

**33%**  
Creating More Meals from Scratch

**27%**  
Making Coffee at Home More Often Instead of Going to Coffee Shops

---

**43%**  
Wait a **FEW EXTRA WEEKS** after restrictions end before returning to restaurants

**55%**  
Continue to create meals from scratch more than before

**38%**  
Wait a **MONTH OR MORE** after restrictions end before returning to restaurants

**66%**  
Continue to make coffee at home more than before

Source: IRI Survey 4/10-4/12 among National Consumer Panel representing Total U.S. Primary Grocery Shoppers

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Consumers are Interested in Elevating Their At-Home Eating Experiences – an Opportunity for Fresh Foods

Damián and I are playing pretend restaurant and I ordered tacos, he goes to the kitchen comes back and says “sorry we’re closed bc Coronavirus” I can’t w/ this little boy 😂😂

7:42 PM · Apr 17, 2020 · Twitter for iPhone

due to covid19, local restaurants are allowed to sell carryout mixed drinks, providing a solution to a problem I didn’t know I had.

5:32 PM · Apr 18, 2020 · Twitter Web App

One small part of our coronavirus self care here was to increase the target price of the wine we drink by about $15 a bottle. I figured since we’re not eating out or traveling we might as well. It’s a whole new world. I will never be able to go back.

6:01 PM · Apr 17, 2020 from Twitter for iPhone
At-Home Cooking Has Had an 89% Positive Sentiment and is Increasing Nearly +2 % Points Even the 6th Week of the Pandemic

Sentiment Posts Distribution

Source: IRI Social Pulse powered by Infegy, looking at “at home cooking” and similar phrases, week ending April 20, 2020
COVID-19 Has Brought American’s Inner Chef Out, With Consumers Highly Engaged and Experimenting in Meals from Home – an Expanded Audience for Fresh

I can’t even lie. Covid-19 has to be the worst thing to happen but it has been good too. We have been having family dinners, playing games, watching movies together, cooking together….that’s a positive. My daughter loves it!

8:09 AM · Apr 18, 2020 · Twitter for iPhone

I love cooking with my mom, we don’t really measure anything. We just eyeball ingredients and hope for the best. If that isn’t the greatest metaphor for this covid19 quarantine I don’t know what is

9:59 PM · Apr 17, 2020 from California, USA · Twitter for iPhone

Source: IRI Social Pulse powered by Infegy, week ending April 20, 2020
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what does this mean for fresh?
While Not the Focus During the Stock-up Rush, Fresh Has Played a Critical Role for Consumers To-Date

- Cooking
- Snacking
- Healthful
- Immunity
The Future of Fresh Foods in 2020

These Essential Fresh Roles Naturally Fill In Consumers’ Needs, But, There’s an Opportunity to Fill More as the Economic and Health Crises Goes On

- Cooking
  - Affordability
- Snacking
  - Convenience
- Healthful
  - Elevating Eating Experiences
- Immunity
  - In-Home Indulgences
where shoppers have bought fresh
For Fresh, Grocery Has Gained the Most Share, While Specialty Retailers Have Been Hit the Hardest

<table>
<thead>
<tr>
<th></th>
<th>w/e 3/8/20</th>
<th>w/e 3/15/20</th>
<th>w/e 3/22/20</th>
<th>w/e 3/29/20</th>
<th>w/e 4/5/20</th>
<th>w/e 4/12/20</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specialty</td>
<td>8.9%</td>
<td>7%</td>
<td>6.1%</td>
<td>6.0%</td>
<td>5.8%</td>
<td>5.9%</td>
</tr>
<tr>
<td>Club</td>
<td>10.2%</td>
<td>9.9%</td>
<td>9.6%</td>
<td>10.5%</td>
<td>10.4%</td>
<td>9.8%</td>
</tr>
<tr>
<td>Supercenter</td>
<td>16.5%</td>
<td>15%</td>
<td>17.1%</td>
<td>16.1%</td>
<td>15.8%</td>
<td>15.4%</td>
</tr>
<tr>
<td>Grocery</td>
<td>60.2%</td>
<td>64.2%</td>
<td>62.7%</td>
<td>63.4%</td>
<td>63.7%</td>
<td>64.2%</td>
</tr>
</tbody>
</table>

Source: IRI Household Panel including fixed and random-weight, Data Ending 4/12/2020 – color coding vs prior week
Consumers Limiting Travel and Trips Benefitted Both National, as Well as Some Regional Retailers, But Not Specialty

Fresh Foods Dollar Share Change for the Latest 4 Weeks Ending 4/12/20 vs. their 2019 Share Average

Regionality Played a Role:
Grocers in Harder Hit Areas (Northeast, West Coast) Were More Likely to Have Share Losses Nationally

Grocers Gaining All Outlet Share

- Publix
- Food Lion
- Safeway
- Winn Dixie
- Albertsons
- Piggly Wiggly

Specialty Retailers Losing Share

- Sprouts
- WinCo Foods
- Trader Joe’s
- Whole Foods Market

Source: IRI Household Panel (not POS) including fixed and random-weight, Data Ending 4/12/2020
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Fresh Foods Growth Has Literally Been a Tale of Two Types of Cities

Markets Scored Compared to Total U.S. Growth for 4 w/e 4-12-20 & Growth Rate vs. 4 w/e 3-8-20

How Areas Re-Open and Recover Will Have an Impact On Fresh Food Sales

Top Growth Markets are Eastern, Urban and Skew Lower Income, Older

Rural Areas Near Hot Spots plus Florida Saw the Lowest Growth
U.S. E-commerce Growth Rates Continue Significant Growth Acceleration in Two Past Weeks with Fresh Foods Posting Highest Growth Year over Year

*Dollar % Change vs. YA, Total E-commerce*

Source: IRI eMarket Insights Model, Total Store is an aggregate of the 204 releasable categories, excludes beer/wine/spirits, Baseline is based on L26 Weeks Ending 4/12/2020

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**Share of E-commerce Dollar Sales by Fulfillment Type**

### Fresh Food

<table>
<thead>
<tr>
<th>Date</th>
<th>Home Shipment</th>
<th>Pick-Up</th>
<th>Delivery</th>
</tr>
</thead>
<tbody>
<tr>
<td>3-08-20</td>
<td>13%</td>
<td>73%</td>
<td>14%</td>
</tr>
<tr>
<td>3-15-20</td>
<td>12%</td>
<td>75%</td>
<td>13%</td>
</tr>
<tr>
<td>3-22-20</td>
<td>15%</td>
<td>65%</td>
<td>20%</td>
</tr>
<tr>
<td>3-29-20</td>
<td>15%</td>
<td>59%</td>
<td>26%</td>
</tr>
<tr>
<td>4-05-20</td>
<td>10%</td>
<td>65%</td>
<td>25%</td>
</tr>
<tr>
<td>4-12-20</td>
<td>10%</td>
<td>65%</td>
<td>25%</td>
</tr>
</tbody>
</table>

### All Other Food

<table>
<thead>
<tr>
<th>Date</th>
<th>Home Shipment</th>
<th>Pick-Up</th>
<th>Delivery</th>
</tr>
</thead>
<tbody>
<tr>
<td>3-08-20</td>
<td>42%</td>
<td>49%</td>
<td>9%</td>
</tr>
<tr>
<td>3-15-20</td>
<td>39%</td>
<td>53%</td>
<td>8%</td>
</tr>
<tr>
<td>3-22-20</td>
<td>47%</td>
<td>42%</td>
<td>11%</td>
</tr>
<tr>
<td>3-29-20</td>
<td>43%</td>
<td>44%</td>
<td>13%</td>
</tr>
<tr>
<td>4-05-20</td>
<td>37%</td>
<td>50%</td>
<td>13%</td>
</tr>
<tr>
<td>4-12-20</td>
<td>37%</td>
<td>50%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Source: IRI eMarket Insights, based on 204 releasable categories, excludes beer/wine/spirits, and retailers where fulfillment can be determined.
Online Ordering of Both Groceries and Take-Out Continues to Be Top of Mind with $1.8MM Mention, But Over 1/3 of U.S. Consumers Having Negative Experiences

Social Sentiment by Demographic on Delivery and Pick-Up

I was awake at 2:30am trying to place a Store Pick Up order at _______. If I wasn’t ordering groceries in the middle of the night, I’d never be able to get a reservation. #COVID19 #ThisIsRidiculous

Need to figure out how to make a bot that alerts you as soon as a time slot becomes available on a grocery delivery or pickup service like AmazonFresh, Whole Foods, Instacart, etc. #coronavirus #COVID19

9:35 PM - Apr 17, 2020 - Twitter Web App
Beyond Grocers and Supercenters, Innovative New Areas Fulfill Demand

With the Foodservice Sector Suddenly Cut, Creativity Abounded in Ways to get Fresh Foods to Consumers

Wholesale
Restaurant
Suppliers
Selling Direct to
Consumers

Subscription
Boxes

Farmer-Direct
Shipments

CSA’s
Key Learnings and Future Considerations for Where Shoppers Buy Fresh

Grocery has re-emerged as the key place for consumers to buy fresh food, but personalization is still key given the innovative availability

Fresh will be crucial in the weeks ahead, but affordability is key

2020 is the year to embrace online strategies in fresh foods – ease in ordering and quality fulfillment via pick-up are must haves, not nice to haves

Fresh is multi-faceted and all of its various roles need to be emphasized to create long-term buying habits, not just short-term sales gains
deeper dive into trips & departments
Meat Drove Growth as Consumers Turned to Home

<table>
<thead>
<tr>
<th>Date</th>
<th>Meat Department</th>
<th>Total Edibles Excl. Fresh</th>
<th>Fresh Perimeter</th>
<th>Produce Department</th>
<th>Total Store with Fresh</th>
</tr>
</thead>
<tbody>
<tr>
<td>3/1/2020</td>
<td>-1.4%</td>
<td>1.9%</td>
<td>-0.7%</td>
<td>0.4%</td>
<td>17.6%</td>
</tr>
<tr>
<td>3/8/2020</td>
<td>7.3%</td>
<td>10.6%</td>
<td>3.4%</td>
<td>3.8%</td>
<td>16.4%</td>
</tr>
<tr>
<td>3/15/2020</td>
<td>62.5%</td>
<td>2.9%</td>
<td>78.2%</td>
<td>34.5%</td>
<td>16.3%</td>
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<tr>
<td>3/22/2020</td>
<td>58.2%</td>
<td>8.9%</td>
<td>80.2%</td>
<td>29.7%</td>
<td>14.2%</td>
</tr>
<tr>
<td>3/29/2020</td>
<td>14.3%</td>
<td>24.7%</td>
<td>11.8%</td>
<td>8.1%</td>
<td>10.6%</td>
</tr>
<tr>
<td>4/5/2020</td>
<td>16.9%</td>
<td>29.4%</td>
<td>15.8%</td>
<td>14.2%</td>
<td>9.3%</td>
</tr>
<tr>
<td>4/12/2020</td>
<td>16.4%</td>
<td>29.5%</td>
<td>17.6%</td>
<td>16.3%</td>
<td>9.7%</td>
</tr>
<tr>
<td>Date</td>
<td>Total Bakery</td>
<td>Dairy Department</td>
<td>Deli Department</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3/1/2020</td>
<td>-4.2%</td>
<td>-1.1%</td>
<td>-22.5%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3/8/2020</td>
<td>2.4%</td>
<td>1.0%</td>
<td>1.3%</td>
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<tr>
<td>3/15/2020</td>
<td>78.8%</td>
<td>5.6%</td>
<td>15.9%</td>
<td></td>
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</tr>
<tr>
<td>3/22/2020</td>
<td>49.2%</td>
<td>60.0%</td>
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<tr>
<td>3/29/2020</td>
<td>6.9%</td>
<td>22.2%</td>
<td></td>
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</tr>
<tr>
<td>4/5/2020</td>
<td>9.3%</td>
<td>30.6%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4/12/2020</td>
<td>9.7%</td>
<td>31.3%</td>
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</tr>
</tbody>
</table>

Source: IRI, Total US, MULO, 1 week % growth versus year ago
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With Stay-At-Home Orders, Fresh Weekly Sales Continue to Show Fresh’s Importance to the Store

**Total U.S. All Outlets Fresh Foods Consumer Purchasing Dynamics**

<table>
<thead>
<tr>
<th>WEEK ENDING</th>
<th>Dollar Sales % Change vs. YA</th>
<th>Actuals</th>
<th>Household Buyers % Change vs. YA</th>
<th>Actuals</th>
</tr>
</thead>
<tbody>
<tr>
<td>3/22</td>
<td>44%</td>
<td>$5.8 B</td>
<td>3/22</td>
<td>4%</td>
</tr>
<tr>
<td>3/29</td>
<td>11%</td>
<td>$4.5 B</td>
<td>3/29</td>
<td>-2%</td>
</tr>
<tr>
<td>4/5</td>
<td>14%</td>
<td>$4.8 B</td>
<td>4/5</td>
<td>0%</td>
</tr>
<tr>
<td>4/12</td>
<td>17%</td>
<td>$4.9 B</td>
<td>4/12</td>
<td>0%</td>
</tr>
</tbody>
</table>

Even During Stock-Up Peak, Fresh Foods is Consistently in 50% of All Store Trips

Source: IRI Panel including fixed and random-weight, data ending April 12, 2020. Fresh Foods
However, Fresh Trips Are Down 27% from Mid-March Peak; Smaller Trips Down vs. 2019; Relevance in Pantry Stocking is More Important than Ever

*Fewer, Larger Trips Have an Impact on Impulse / Immediate Fresh Departments Like Bakery, Deli*

### Fresh Foods Trip Count by Type (MM)

<table>
<thead>
<tr>
<th>Type</th>
<th>W/e 22 Mar 2020</th>
<th>W/e 29 Mar 2020</th>
<th>W/e 05 Apr 2020</th>
<th>W/e 12 Apr 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quick Trip</td>
<td>96 (26%)</td>
<td>74 (26%)</td>
<td>84 (30%)</td>
<td>83 (31%)</td>
</tr>
<tr>
<td>Special Purpose</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fill In</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pantry Stocking</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Source: IRI National Consumer Panel 1 weeks ending April 12, 2020. vs Year Ago All Outlets.*

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Although Fresh Trips Are Down More So Than Other Foods, Spending is Ticking Up

*Fresh Has Relied on the Trend toward More Frequent Smaller Trips; Must Stay Relevant in the New Reality*

<table>
<thead>
<tr>
<th></th>
<th><strong>Trips per Buyer</strong></th>
<th></th>
<th><strong>Dollars per Trip</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Fresh Foods</td>
<td>F&amp;B ex. Fresh</td>
<td>Fresh Foods</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>W/e 22 Mar 2020</strong></td>
<td>3.5</td>
<td>4.6</td>
<td><strong>W/e 22 Mar 2020</strong></td>
</tr>
<tr>
<td><strong>W/e 29 Mar 2020</strong></td>
<td>2.7</td>
<td>3.6</td>
<td><strong>W/e 29 Mar 2020</strong></td>
</tr>
<tr>
<td><strong>W/e 05 Apr 2020</strong></td>
<td>2.6</td>
<td>3.4</td>
<td><strong>W/e 05 Apr 2020</strong></td>
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<tr>
<td><strong>W/e 12 Apr 2020</strong></td>
<td>2.6</td>
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<td><strong>W/e 12 Apr 2020</strong></td>
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<td><strong>W/e 22 Mar 2020</strong></td>
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<td><strong>W/e 29 Mar 2020</strong></td>
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<tr>
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<td></td>
<td><strong>W/e 05 Apr 2020</strong></td>
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<tr>
<td></td>
<td></td>
<td></td>
<td><strong>W/e 12 Apr 2020</strong></td>
</tr>
</tbody>
</table>

**% Change VS. YA**

- Fresh Foods: 25.9% (2020), 1.7% (2019), -4.9% (2018), -5.8% (2017)
- F&B ex. Fresh: 42.0% (2020), 10.2% (2019), 3.3% (2018), 2.8% (2017)

*Source: IRI National Consumer Panel 1 week ending April 12, 2020, vs Year Ago All Outlets.*
Shopper Focus on Fresh, Shelf-Stable and Frozen Foods Wasn’t Unique to the Initial Buying Frenzy in March – Baskets & Spending Are Higher in April Across All

Latest Week Ending April 12, 2020 vs Peak Stock-up Week (March 15, 2020)

<table>
<thead>
<tr>
<th></th>
<th>Basket Size ($)</th>
<th>Dollars per Trip ($)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>w/e March 15, 2020</td>
<td>w/e April 12, 2020</td>
</tr>
<tr>
<td>Fresh Foods</td>
<td>54.8</td>
<td>14.6</td>
</tr>
<tr>
<td>Dept. General Food</td>
<td>65.4</td>
<td>16.8</td>
</tr>
<tr>
<td>Dept. Frozen</td>
<td>63.3</td>
<td>16.8</td>
</tr>
</tbody>
</table>

Source: IRI National Consumer Panel All Outlets Data Week Ending April 12, 2020 vs. 15 Mar 2020

© 2020 Information Resources Inc. (IRI). Confidential and Proprietary.
Perishable Foods Retain Half of All Basket Spending Similar to Last Year Period; As Pandemic Continues into May Could Increase in Importance

Share of Average Basket | 4 Weeks Ending April 12, 2020

<table>
<thead>
<tr>
<th>Perishable Foods</th>
<th>All Other Food</th>
</tr>
</thead>
<tbody>
<tr>
<td>11.3 24.1 20.1 25.7 27.0</td>
<td>23.0 21.4 38.5 4.1 13.6 210.5</td>
</tr>
</tbody>
</table>

Despite strong growth, Perishables (incl. Dairy) comprise -0.4% pts less of the average basket

General Food accounted for greatest portion of the growth in average basket size

Source: IRI National Consumer Panel All Outlets data 4 Week Ending 12 Apr 2020 vs. Year Ago
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Meat Department has Been an Over Performer, Produce Keeps Pace While Service-Nature of Deli Has Caused Year-over-Year Declines Despite Pandemic

Dollar % Change vs. YA // Total U.S. MULO // Fresh Foods Department // TSV Model with Fresh

Source: IRI TSV Model   Note: Data reflected does not include Costco or Total E-commerce
Meat and Potatoes (Literally) Were in Highest Demand Across Fresh Departments

Top 15 Fresh Foods with Highest Growth vs. YA and Prior Period, 4 WE 4-12-20

- Bacon
- Beef Brisket
- Beef Ribeye Steaks
- Deli Grab & Go Sliced Cheese
- Deli Grab & Go Sliced Meats
- Frankfurters
- Fresh Garlic
- Ground Beef
- Ground Pork
- Oranges
- Pork Ribs
- Potatoes
- Sausage
- Sweet Potatoes
- Whole Bird Turkey

Source: IRI POS Total Store View with Perimeter, Categories of Significant Size, data period ending 4-12-20; excludes categories sparked by earlier Easter
Key Learnings and Future Considerations for Fresh Trips

Trips will evolve as the “shelter in place” directives evolve – city-by-city; state-by-state

Monitor ongoing to ensure you have the right assortment and pricing to keep consumers buying fresh from your stores and/or click & collect

Grocers have to consider total store solutions and balance now more than ever – it can’t be about fresh “versus” but fresh “plus” to meet consumers’ food at-home needs
consumer attitudes
EconoLink Provides View of Americans’ Response to COVID-19 Through a Human Economic Lens That Goes Beyond Income; Not All Respond Alike

**SAVVY SHOPPERS**
Skews
Younger Baby Boomers and Retirees
Mean HHI $75,600

**CAREFREE**
Skews
Older Boomers & Retirees
Male
Live Alone
Upper Income

**OPTIMISTIC**
Skews
Gen Z, Millennials and Gen X
4+ Member HHs
African American
Mean HHI $72,000

**DOWNTRODDEN**
Skews
Older Millennials / Younger Boomers
Blue Collar
Hispanic
Lower Income

**CAUTIOUS & WORRIED**
Skews
Baby Boomers
Live Alone

**START-UPS**
Skews
Gen Z/Millennials
African American, Asian
Blue Collar
Lower Income

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More Than Half of Americans Are Extremely Concerned About COVID-19, Including the Vast Majority of Downtrodden and Start-Ups Segments

Nearly Three-Quarters of People in These Segments Are More Concerned About COVID-19 Than They Were a Week Ago

% EXTREMELY CONCERNED
Segment as % of respondents

<table>
<thead>
<tr>
<th>Wave 2 Total Respondents</th>
<th>Carefree</th>
<th>Optimistics</th>
<th>Savvy Shoppers</th>
<th>Cautious and Worried</th>
<th>Start Ups</th>
<th>Downtrodden</th>
</tr>
</thead>
<tbody>
<tr>
<td>% WITH CHILDREN LIVING AT HOME</td>
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</tbody>
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% EXTREMELY CONCERNED

- COVID-19
- Economy

- Wave 2 Total Respondents: 58% (COVID-19) vs. 37% (Economy)
- Carefree: 47% (COVID-19) vs. 28% (Economy)
- Optimistics: 48% (COVID-19) vs. 29% (Economy)
- Savvy Shoppers: 49% (COVID-19) vs. 30% (Economy)
- Cautious and Worried: 63% (COVID-19) vs. 44% (Economy)
- Start Ups: 67% (COVID-19) vs. 41% (Economy)
- Downtrodden: 81% (COVID-19) vs. 51% (Economy)


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Despite Having Economic Struggles, Start-Up and Downtrodden are Buying More Fresh Foods

Recent Changes in Shopping Choices Due to Coronavirus

- More stock-up trips: 63% (Wave 2), 67% (Start-Ups), 77% (Downtrodden)
- Buying more sanitizing products: 26% (Wave 2), 42% (Start-Ups), 43% (Downtrodden)
- Stocked up on OTC medications: 19% (Wave 2), 31% (Start-Ups), 30% (Downtrodden)
- Buying immune boosting products: 15% (Wave 2), 19% (Start-Ups), 28% (Downtrodden)
- Buying more fresh foods: 15% (Wave 2), 18% (Start-Ups), 25% (Downtrodden)
- Ordering online more: 13% (Wave 2), 23% (Start-Ups), 23% (Downtrodden)
Looking at Only Income for Fresh Foods Spending, Lower Income Had Nearly as High an Increase as Upper

*Fresh Foods Dollar Sales % Chg vs. YA*

Lower
<$30k 1P + $5k per add’l Person

Middle
$30-70k 1P + $5k per add’l Person

Upper
>$70k 1P + $30k all others

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<td>12</td>
<td>23</td>
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<tr>
<td>3</td>
<td>14</td>
<td>17</td>
</tr>
<tr>
<td>2</td>
<td>15</td>
<td>25</td>
</tr>
</tbody>
</table>
Spending Growth in Fresh is Similar for Highest and Lowest Income with Lower Income Outpacing in Baked Goods and Deli

*Dollar % Change vs. YA // All Outlets// 4 Weeks ending 4/12/20*

- **Total Food**: Upper Income - 36%, Lower Income - 34%
- **Fresh Food**: Upper Income - 25%, Lower Income - 23%
- **Meat**: Upper Income - 19%, Lower Income - 19%
- **Produce**: Upper Income - 19%, Lower Income - 19%
- **Baked Goods**: Upper Income - 12%, Lower Income - 19%
- **Deli**: Upper Income - -20%, Lower Income - -16%
- **Seafood**: Upper Income - 20%, Lower Income - 17%

*Source: IRI Household Panel including random and fixed weight, Household Income per Capita, 4 weeks ending 4/12/20*
More Than a Third of Consumers Will Spend CARES Stimulus Money on Groceries and Household Essentials

Q. What are the main ways you expect to use the money you receive from the government stimulus/economic relief plan?

- 47.7% To pay rent, mortgage, taxes, or utilities
- 40.1% To add to my savings or investment accounts
- 34.8% To buy more groceries and other everyday household essentials
- 11.5% To pay healthcare bills; caregiver expenses
- 10.1% To buy household items; clothing

Source: IRI Survey 2020, among IRI Consumer Network™ Panel representing Total U.S. Primary Grocery Shoppers.
Changes to SNAP Funding Provides More $ to Lower Income HH and Expands to Offer Choice of In-Store and Online Ordering to Recipients

U.S. Department of Agriculture’s April 22 Announcement

40% Increase in Overall Monthly Benefits to SNAP Program

4.5B Current Monthly Benefits, Increase by $2B to $6.5B

50% of overall SNAP recipients are able to receive purchases online, as SNAP expands to enable online food purchases, with 16 states approved as of April 2020
Consumer Attitudes Summary:

Fresh Foods Has Great Growth Opportunities for Months to Come

• With concerns over eating out, **cooking at home trends are expected to continue** across all socioeconomic groups

• Past recessions showed low income consumers make meals at home as a cost-saving measure – expect to see this going forward especially with recent expansions to **government assistance favoring fresh, healthy foods**

• Consumers with income may **treat themselves with fresh foods** like lobster and artisan bread while also relying on step-saving convenient foods to replace take out meals like they did in The Great Recession

• Recently, social distancing and more at-home time has favored individual ingredients and experimenting with recipes - Embrace this opportunity with **targeting, education strategies and tactics**

• Healthy choices are expected to be top of mind with **fresh foods poised to play a key role** after the easing of quarantine restrictions, along with the typical concern over summer/swimsuit season
health and wellness
The Coronavirus Has Put Health Top of Mind for Many Consumers

Across the Store, Immunity Builders Had Triple Digit Growth Rates During the March Pandemic Buying Period

82% of U.S. Consumers Cite Food and Beverages as a Key Part of Their Self-Care

IRI’s NutriLink Segmentation Identified Six Unique and Targetable Groups of Consumers Based on U.S. Consumers’ Approaches to Health, Diet and Nutrition

NutriLink Segments and Sizes

- Fast & Frugal: 26%
- Sensible Super Moms: 20%
- Convenient & Content: 14%
- Wise & Healthy: 16%
- Healthy Chic: 16%
- Carefree Coasters: 9%
The Highest Health-Engaged Segments are Important to Fresh and the Store

Healthy Chic

- Younger, affluent
- Spend 15% more in store when fresh is in the basket in latest 4 wks
- Highest dollars per buyer on fresh, and spent 18% more than average household

Wise & Healthy

- Skew Baby Boomer and Retiree
- During COVID-19, higher increase in basket dollars with fresh than center
- But growth in fresh spending during COVID-19 did not keep pace with other segments
Spending Increased Across All Segments for Fresh and Center Store With Significant Increases In the Least Health-Minded

Growth in Dollars per Buyer / 4 Weeks Ending 4/12/20 vs. Year Ago

FRESH FOODS

- Convenient & Content: +15.4
- Fast & Frugal: +15.3
- Carefree Coasters: +9.9
- Sensible Super Moms: +10.2
- Wise & Healthy: +6.5
- Healthy Chic: +10.7

ALL OTHER FOOD & BEVERAGE

- +29.2
- +28.4
- +30.3
- +26.0
- +19.8
- +29.7

Increased Fresh Buying is an Opportunity for the Industry, While Also Mindful to Not Assume Health-Minded Consumers Will Automatically Look to the Perimeter Departments and Not the Center-Store

Source: IRI Household Panel data- NaturalLink Segmentation, green indicates higher growth than total population average

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Food Category Winners Aligned with Each Segment’s Approach to Health and Nutrition, With Fresh Benefiting Across Many Food Categories by NutriLink Segment with Highest Dollars per Buyer Increase, 4 Weeks Ending 4/12/20

All Segments Increased Meat Spending – Opportunities Abound to Capitalize On At-Home Meals

IRI NutriLink Panel data, 4 weeks ending 4/12/20 fixed and random weight items included. Segment must have exceeded the general population’s growth rate to be included above.

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Regardless of Healthy Lifestyle Attitudes, All Consumers are Similarly Concerned About COVID-19 with Only Wise & Healthy Even More

% of Consumers – Wave 5 – April 10 – April 12

75% Wise & Healthy

62% Rest of Segments
Online Grocery Ordering Continues to Grow, with Healthy Chic More Engaged Than the General Population

% Ordering More Groceries Online Since Onset of COVID-19 Situation
Given Wise & Healthy Over-Spend in Fresh and Their Financial Situation is Worse Than Year-Ago, There Could Be a Link to Their Impact on Perishables

Wise & Healthy Who Are Cautious and Worried About Their Financial Situation 43%

Healthy Chic Who Are Optimistic 32%
Wise & Healthy Consumers State They Haven’t Shifted to Other Brands in Out-of-Stock Situations as Much as Healthy Chic Consumers Have

“*I have tried different brands/varieties in the past month because the item I usually buy was unavailable*”

<table>
<thead>
<tr>
<th>Total Respondents</th>
<th>Wise &amp; Healthy</th>
<th>Healthy Chic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agree Somewhat</td>
<td>43%</td>
<td>37%</td>
</tr>
<tr>
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<td>22%</td>
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<td>12%</td>
<td>18%</td>
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“*I have chosen Store Brand / Private Label items more often in the past month because the name brand I usually buy was unavailable*”

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<td>18%</td>
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</table>

“*I have chosen Store Brand / Private Label items more often instead of name brands in the past month to save money*”

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<td>12%</td>
<td>12%</td>
</tr>
</tbody>
</table>
Both Healthy Chic and Fast & Frugal Segments Expect to Cook at Home More Post Crisis; Growth Levers Like Already-Made / Step-Saving Fresh Will be Needed

**Plans for Creating Meals From Scratch After Coronavirus**

<table>
<thead>
<tr>
<th>Plan</th>
<th>Total Respondents</th>
<th>Wise &amp; Healthy</th>
<th>Healthy Chic</th>
<th>Convenient &amp; Content</th>
<th>Fast &amp; Frugal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Will return to my usual meal preparation at home</td>
<td>32%</td>
<td>40%</td>
<td>30%</td>
<td>42%</td>
<td>24%</td>
</tr>
<tr>
<td>Will switch to dining at restaurants more</td>
<td>4%</td>
<td>13%</td>
<td>2%</td>
<td>13%</td>
<td>0%</td>
</tr>
<tr>
<td>Will switch to getting more take-out</td>
<td>7%</td>
<td>13%</td>
<td>2%</td>
<td>13%</td>
<td>7%</td>
</tr>
<tr>
<td>Will continue to create meals from scratch more than I did before the Coronavirus</td>
<td>55%</td>
<td>46%</td>
<td>55%</td>
<td>35%</td>
<td>69%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Segment</th>
<th>Will continue to create meals from scratch more than I did before the Coronavirus</th>
</tr>
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<td>35%</td>
</tr>
<tr>
<td>Fast &amp; Frugal</td>
<td>69%</td>
</tr>
</tbody>
</table>

**Note:** The percentages indicate the proportion of respondents in each segment who expect to cook at home more after the Coronavirus, and the diagram illustrates the distribution across different segments.
More Consumers Focused on Wellness
Which is Key for Fresh –
But Affordability is Crucial

• The economic impact will touch everyone and people will try to keep healthy

• Continue and/or expand promoting the benefits of Fresh with signage, social & digital and online

• Creatively communicate recipes via videos and other methods for the at-home meal occasions

• Enhanced consumer perceptions on the role of the grocery store in day-to-day life; Grocers have an opportunity to build on this momentum and embrace online even more broadly

• For the health-minded, behaviors remain similar but ability to cook healthful meals at home and affordability of fresh options cannot be overlooked
additional thoughts for your consideration
Economic and COVID-19 Pressures Represent Opportunity

Fresh Has What’s In-Demand This Summer – But the Field is Crowded

• More shoppers cooking at home across the health spectrum: Fresh sales should increase over the next year, but affordability will be critical

• Fresh has been out-marketed by CPG in the past, assuming shoppers will know the benefits of fresh foods can’t be under-estimated now when the fight for shopper dollars is fiercer than ever

• Americans are becoming more engaged in food preparation. With center-store goods amply stocked in pantries, the need and ease of fresh can fuel ongoing sales and create lifelong cooking habits focused on fresh

• There will be an increased need to cater solutions – fresh foods is an affordable indulgence versus going to a restaurant, especially for those more motivated by taste versus health

Now is the time for fresh to look beyond individual categories and commodity-based selling to bring total store solutions and creative connections to consumers
The Mosaic of Fresh Food Trends are More Important Than Ever
The Coronavirus Pandemic Has Increased the Need to Focus on What Shoppers Want Most
IRI’s Four Part Webinar Series Tracking the Dramatic Pivot of the U.S. Consumer and Shopper During the COVID-19 Pandemic

May 7 – Key Learnings in Produce in the Era of COVID-19

May 13 – Key Learnings in Dairy, Deli and Bakery in the Era of COVID-19

May 20 – Key Learnings in Protein in the Era of COVID-19
thank you!

Sally Lyons Wyatt
Sally.LyonsWyatt@IRIworldwide.com

Jonna Parker
Jonna.Parker@IRIworldwide.com
appendix
EconoLink Provides View of Americans’ Response to COVID-19 Through a Human Economic Lens That Goes Beyond Income; Not All Respond Alike

SAVVY SHOPPERS
Their financial situations are improving vs. YAG, but they still look for value – although that doesn’t always mean the lowest price. They love to find coupons and good deals on groceries.

SKEWS:
Younger Baby Boomers, Retirees | Mean HHI $75,600

CAREFREE
Their financial situations are in a stable place; no real financial concerns. They’re willing to splurge on premium products, and brand preference is a greater driver than price for their buying decisions.

SKEWS: Older Boomers & Retirees | Male | Live Alone | Upper Income

OPTIMISTICS
Their financial situations are better vs. YAG, and they are optimistic about their financial future. Price is on their radar, but so are product experiences and brand trust.

SKEWS: Gen Z, Millennials and Gen X | 4+ Member HHs | African American | Mean HHI $72,000

DOWNTRODDEN
Their financial situations are markedly worse vs. YAG, and their go-to response is deprivation; they try to cut back on everything. Purchases highly influenced by price, brand, and/or prior experience/trust.

SKEWS: Older Millennials/Younger Boomers | Blue Collar | Hispanic | Lower Income

CAUTIOUS & WORRIED
Their financial situations are markedly worse vs. YAG, and they do not hold out a lot of hope for things to get better.

SKEWS: Baby Boomers | Live Alone

START-UPS
Their financial situations are largely the same as YAG, but they’re still struggling. They, too, are focused on cutting back, but with positive expectations for future improvement in their financial situations.

SKEWS: Gen Z/Millennials | African American, Asian | Blue Collar | Lower Income
FMI Coronavirus Resources

www.fmi.org/coronavirus

Coronavirus Resources

CDC is working across the Department of Health and Human Services and across the U.S. government in the public health response to COVID-19, commonly known as coronavirus. FMI has compiled background information, a preparedness checklist, resources and more to support the food industry.

(Right Click On This Page to Print, Page Updated March 27, 2020)

FMI Foodservice Partnership for Resource Availability

FMI has created a process for connecting foodservice distributors that have excess capacity with food retailers and wholesalers in need. Learn More

Pandemic Preparedness Checklist

To achieve maximum benefit, develop and implement a plan to promote beneficial personal protective measures, environmental protective measures and community distancing measures. Learn More

Coronavirus (COVID-19) FAQ

Answers to your questions on coronavirus (COVID-19) including background details, coronavirus and food, employee and customer health and safety and social distancing. Learn More

Families First Coronavirus: Summary of SNAP Provisions

A brief description of the provisions and the potential impact of The Families First Coronavirus response bill and impact for your SNAP shoppers. Learn More

FMI Coronavirus Business Solutions and Resources

FMI has curated important business solutions during this ongoing crisis to support the food industry. Learn More
Supply Chain
- Advocacy for transportation
- Resource sharing
- Foodservice needs network
- Private brands
- Manufacturing

Public Policy
- Federal
- State
- Local
- USDA
- FEMA
- FDACDC

Safety and Sanitation
- Standard protocols
- Links to best practices
- Access to PPE for essential tasks
- Information on approved chemicals (EPA-List N)

Media/Social
- Demand vs. supply
- Worker safety
- Food industry resilience
FMI State Issues Crisis Tracker

www.fmi.org/stateissuescrisistracker

**State Issues Tracking**

**COVID-19 - WIC Waivers State by State**

MAR 24, 2020

FMI is in the process of issuing individual waiver approval letters to the State Agencies. These waivers allow for certain food package substitutions, as requested by the states or EBT, provided they are consistent with the nutritional basis of.

**COVID-19 - CDL Extensions By State**

MAR 27, 2020

Although the Federal Motor Carrier Safety Administration (FMCSA) issued an enforcement notice on expiring CDLs and commercial learner’s permits (CLPs), the enforcement does not necessarily affect all 50 states.

**COVID-19 - State Emergency Declarations - Truck Weight Limits and Hours of Service**

MAR 17, 2020

Many states have declared a state of emergency, which for up to six states, and in some cases, allows them to waive certain regulations to help ensure the VOC-19 outbreak. The states below have declared a state of emergency.

**General State Resources**

- Stateside: COVID-19 State & Local Government Report [as of April 20]
- State Emergency Declarations Relative to Mass Gatherings [updated April 20]
- COVID-19 State By State Child Care Landscape
- FM Local COVID-19 Grocery Store Restrictions Tracker
- State Price Gouging Laws and Emergency Declarations
- The FMCSA has granted a waiver to CDL and CLP holders who have experienced issues with obtaining access to DND offices and to medical examiners, many of whom are refusing to take appointments for DOT physicals due to contamination concerns. The waiver extends the date of expiration - until June 30 - of applicable CDLs, CLPs, and non-CDL licenses of commercial drivers, as well as medical certificates that would otherwise expire between March 1 and June 30.

**Additional State Coronavirus Updates**

**STATE GROCERY STORE SOCIAL DISTANCING GUIDANCE / SHELTER IN PLACE / REQUIREMENTS**

(e.g. face covering requirements, limits on number of customers in store)

*States with restrictions on seeing non-essential items*

- Colorado
- Connecticut
- Delaware
- Georgia
- Illinois
- Kentucky
- Maine
- Maryland
- Massachusetts
- Michigan*
- Minnesota
- Nevada
- New Jersey
- New York
- North Carolina
- Ohio
- Oregon
- Pennsylvania
- Rhode Island
- Utah
- Vermont*
- Wisconsin

**BOTTLE BILL SUSPENSIONS**

- Connecticut
- Iowa
- Maine
- Massachusetts
- Michigan
- New York
- Oregon
- Vermont

**Critical Infrastructure Workers Credentials / Other State Resources**

- Arizona
- California
- Connecticut
- Illinois
- Kentucky
- Louisiana
- Massachusetts
- Montana
- New York
- North Carolina
- Ohio
- Utah

**CARRYOUT BAGS**

At the state level, Connecticut, Maine, Massachusetts, New Hampshire and New York have taken temporary action on checkout bags. Click on those states below for more information. Although CDC has chosen not to weigh in on the issue of reusable bag sanitation, FMI’s Food Safety Team has guidance available on the topic.
I. Best Practices and Planning for the Immediate Situation

II. Short-Term Best Practices

III. Suggested Business Practices

Comprehensive: Coronavirus and Pandemic Preparedness for the Food Industry

www.fmi.org/coronavirus
FMI Key Research on Fresh

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freshforward
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2020 Topics

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- Accelerating the Fresh Supply Chain
- New Era for Packaging

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The Fresh Foods Community

We are committed to the growth and success of fresh food companies and their partners by providing resources and networking opportunities that support the interests of member companies throughout the global, fresh supply chain.

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Thank You

If you registered for this webinar, you will receive a link to this recorded presentation by e-mail in 2-3 days, including the Q&A.