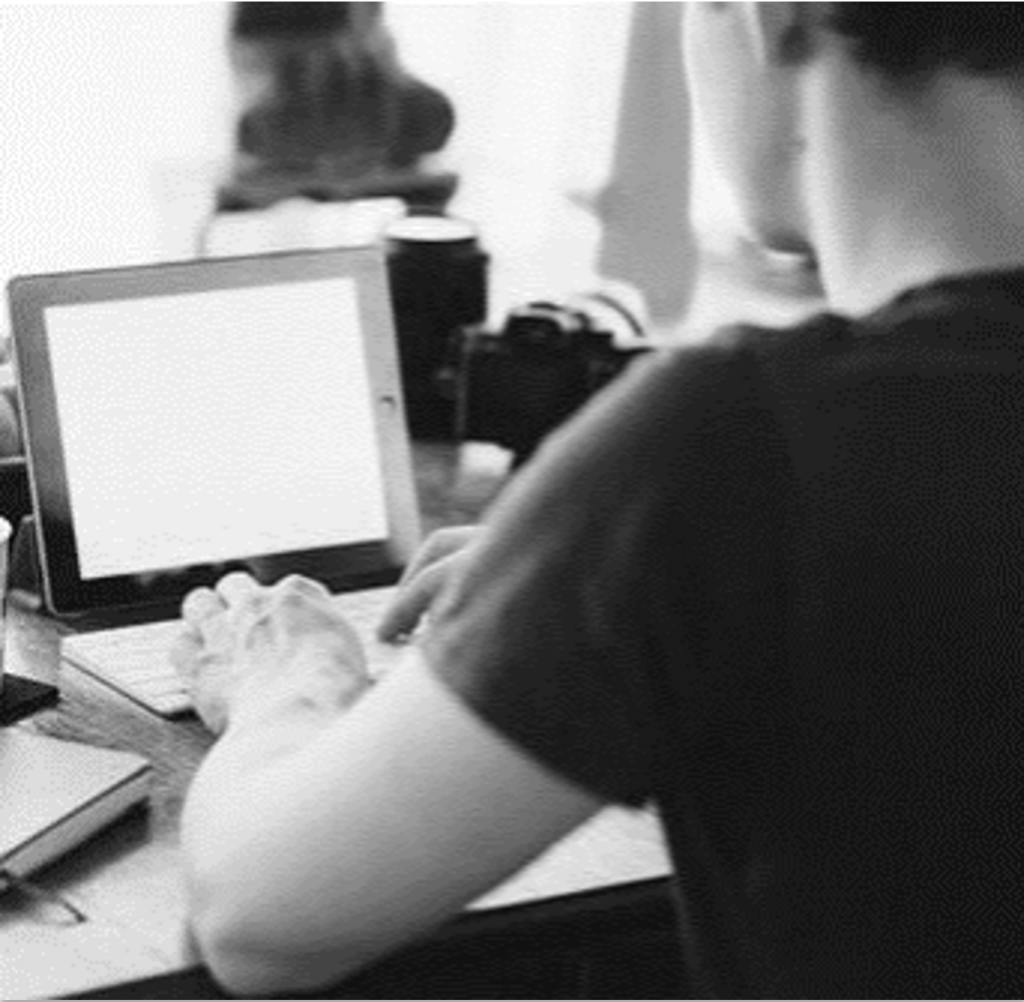


Today's webinar will begin momentarily...

Here are a few tips to improve your viewing experience



- **Make sure your computer speakers are on and adjusted to the volume of your choice.**
- **Close additional browser windows and online applications.**
- **If you experience technical difficulties, please close your browser and log back in.**



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Ask the speakers questions throughout this webinar using the Q&A function – in your GoToWebinar Control Panel, type in any questions you have for the speaker in the Questions box under the Questions tab.



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Thomas Baldwin

**Product Manager,
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Marketplace Trends During COVID-19

Warehouse-delivered Products

April 15, 2020

NOTICE:

This presentation is based solely on an analysis conducted by Management Science Associates, Inc. (MSAi) and does not necessarily reflect the opinion of any client.

Unless stated otherwise, NACS category definitions are used in the following presentation.

Data source: InfoMetrics and C-Metrics[®] Projected Data for warehouse delivered products

Agenda

- *Marketplace Behavior*
- *C-Store Performance*
- *Top Categories*
- *Category Performance*
- *Regional Performance*
- *Summary*

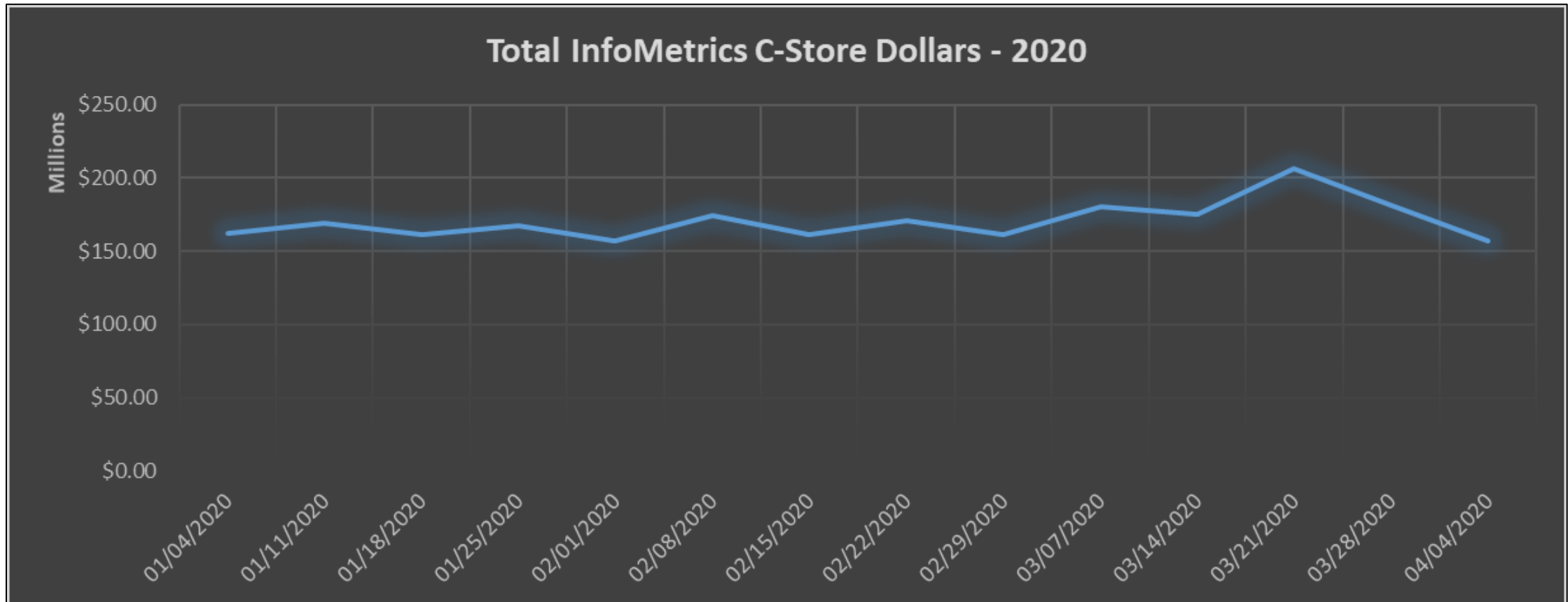
Marketplace Behavior

- *Stores limiting the number of customers entering the stores*
- *Panera Bread selling grocery items*
- *Online grocery services*
- *Store cleanliness/Employee Safety*
- *Distributor/Store closings/Tobacco Stores*

C-Store Performance - Dollars

Average weekly dollars for 65 weeks ending 2/29/20 are \$177.7M.

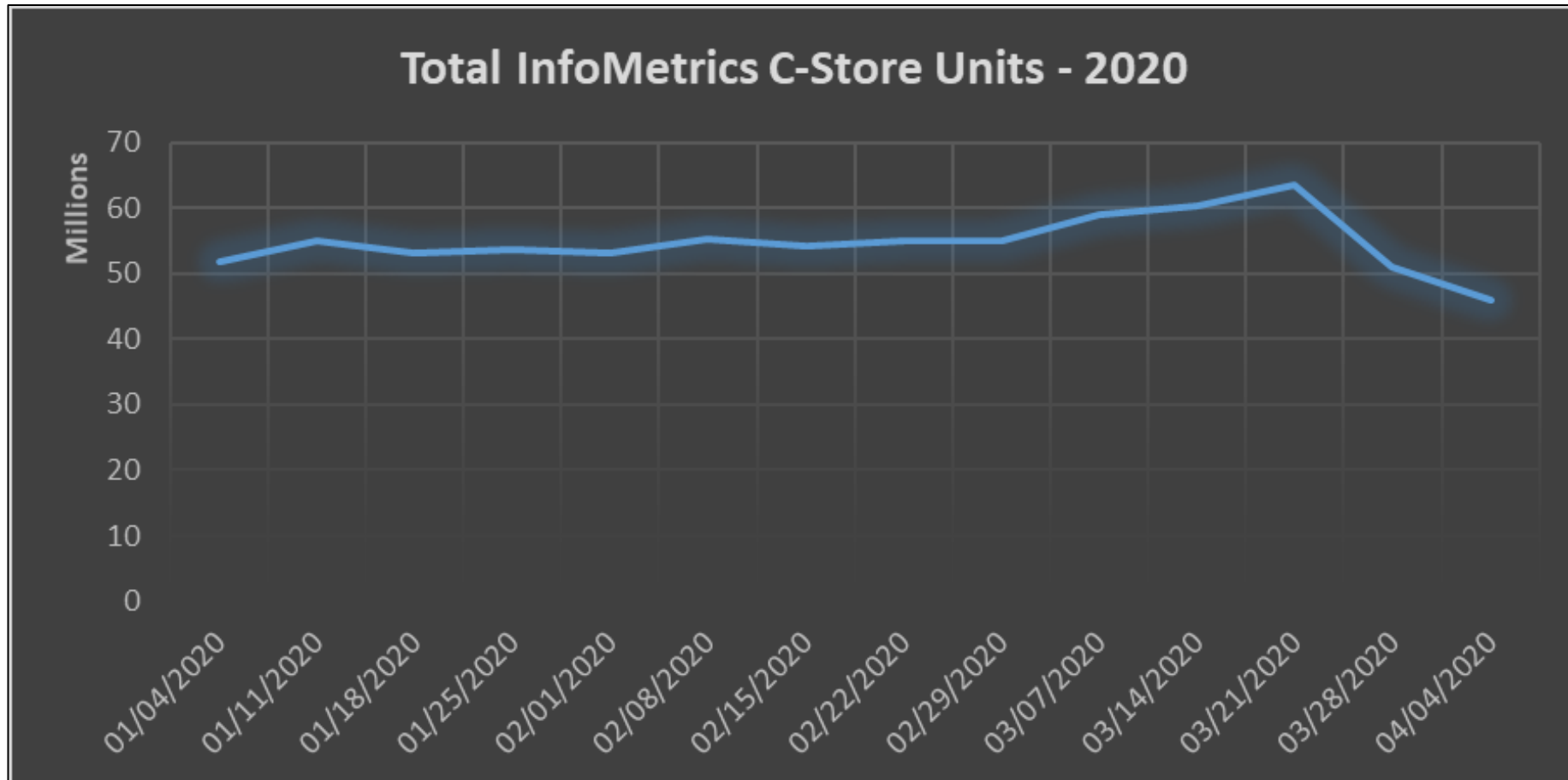
Category	3 weeks ending 3/21/20	Week ending 3/28/20	Week ending 4/4/20
Total C-Store	Up 5.5%	Up 1.9%	Down 11.4%



C-Store Performance - Units

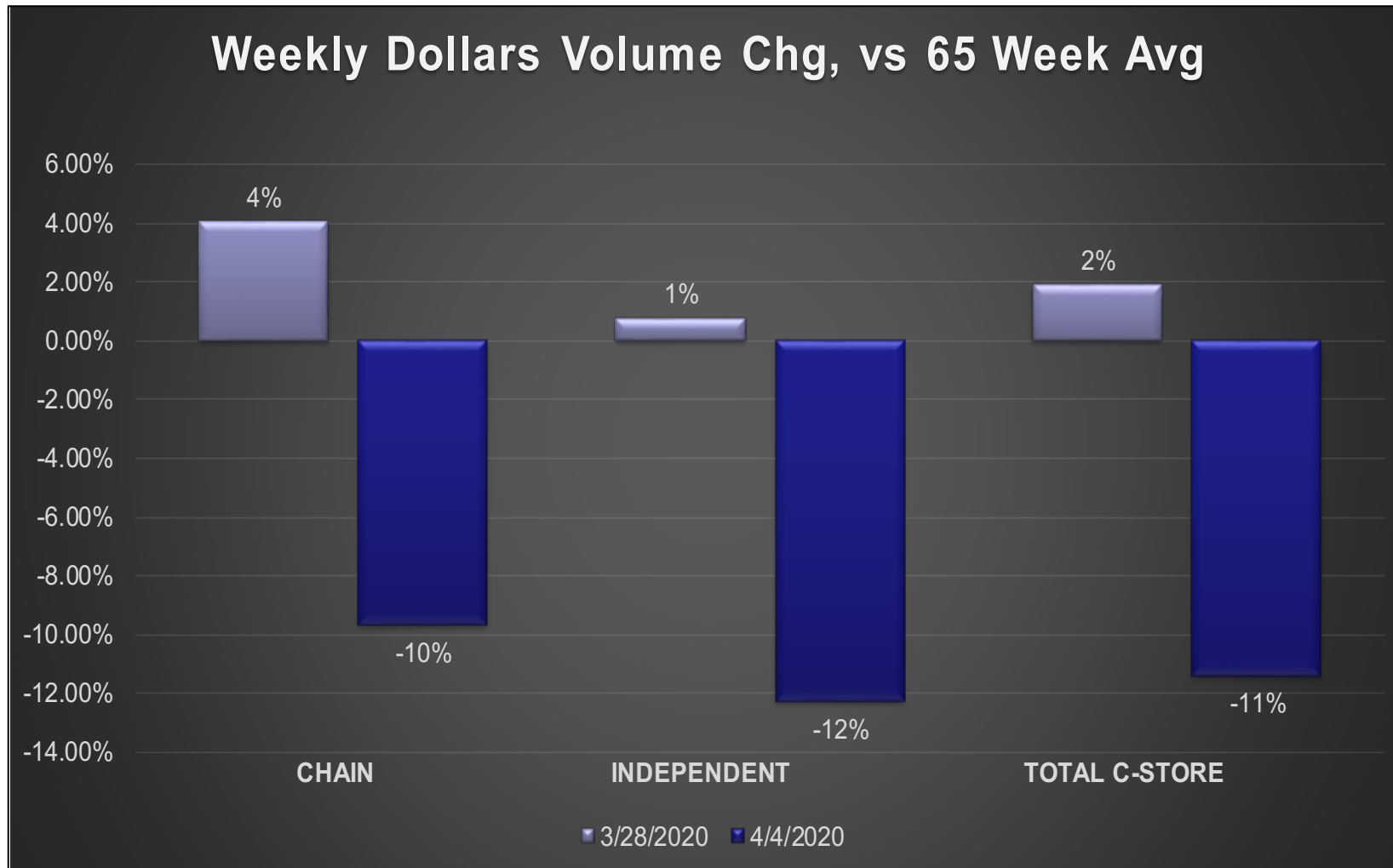
Average weekly units for 65 weeks ending 2/29/20 are 59.7M units.

Category	3 weeks ending 3/21/20	Week ending 3/28/20	Week ending 4/4/20
Total C-Store	Up 2%	Down 14.7%	Down 22.9%

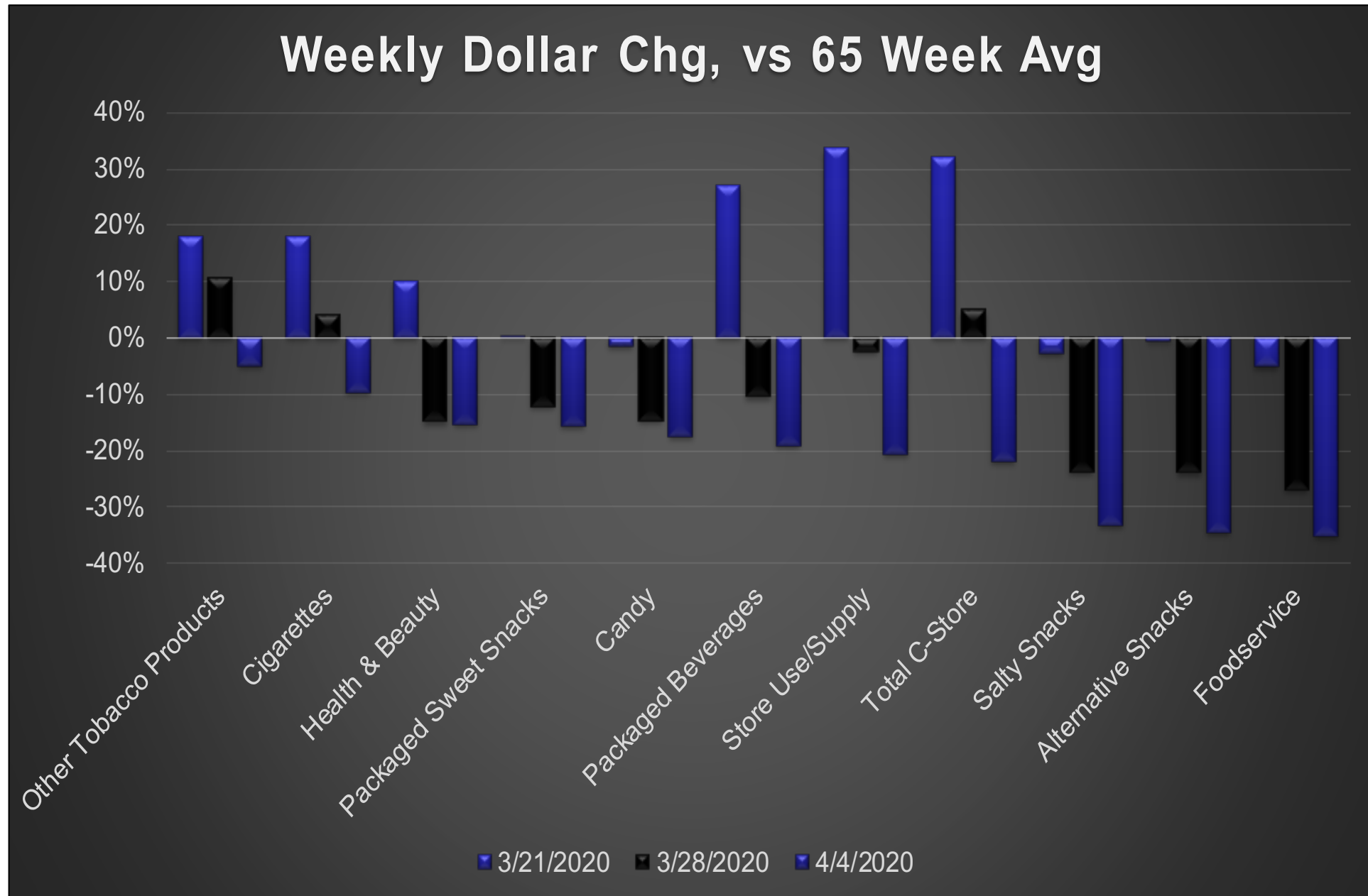


Chain versus Independent - Performance

Type	3 weeks ending 3/21/20	Week ending 3/28/20	Week ending 4/4/20
CHAIN	Up 6.7%	Up 4%	Down 9.7%
INDEPENDENTS	Up 4.8%	Up 0.8%	Down 12.3%

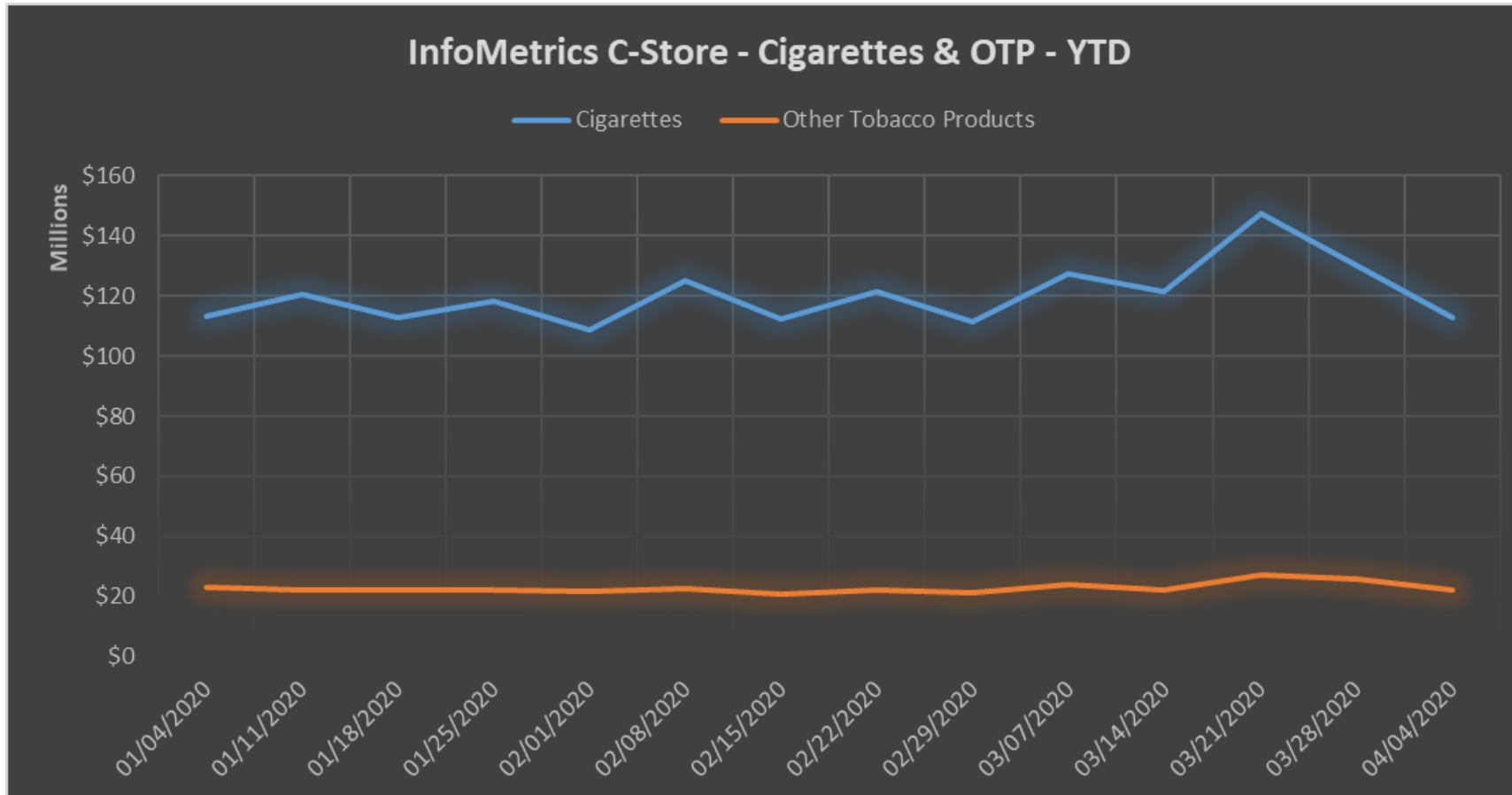


3/21, 3/28 & 4/4 - Category Performance – Dollars



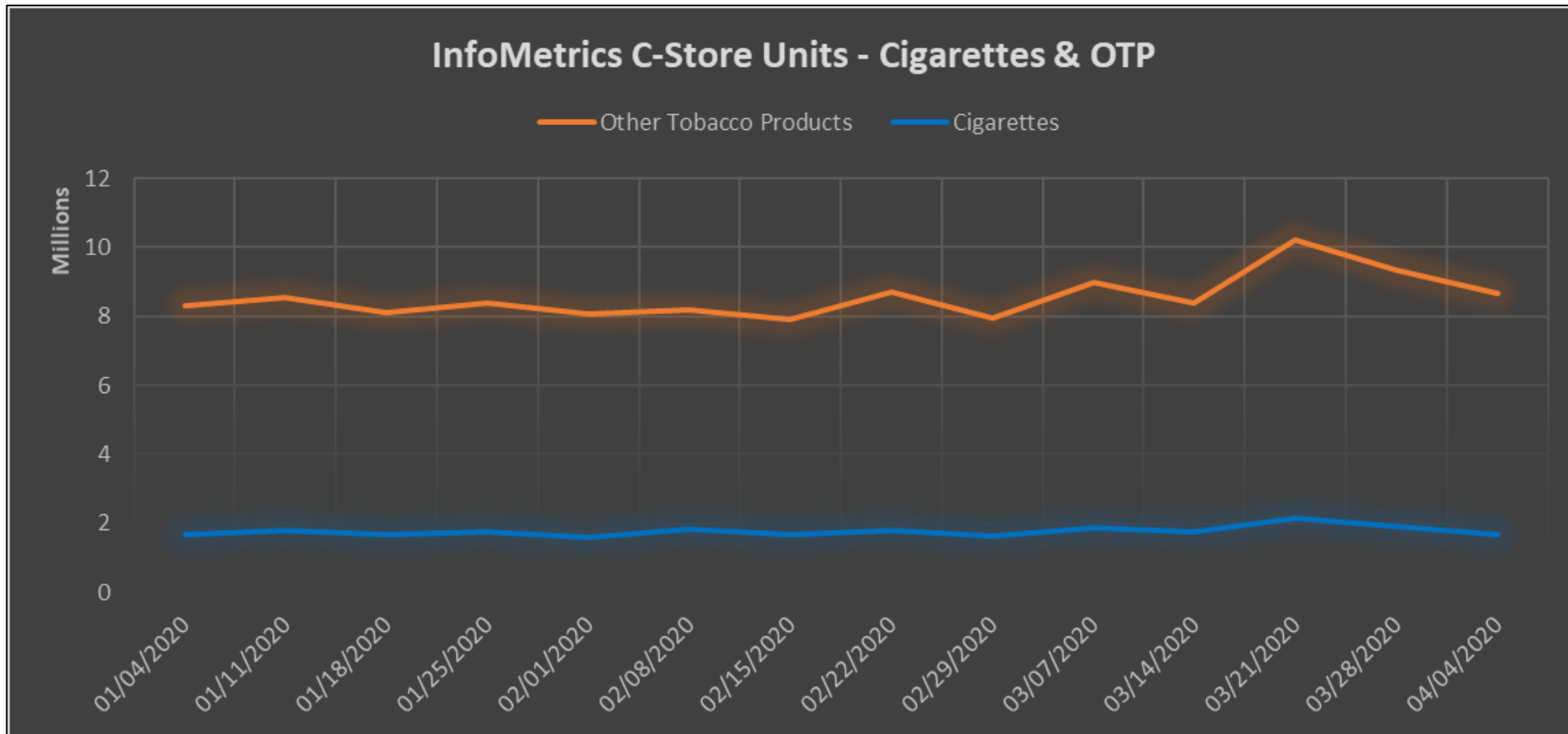
Category Performance – Cigarettes & OTP - Dollars

Category	3 weeks ending 3/21/20	Week ending 3/28/20	Week ending 4/4/20
Cigarettes	Up 7.3%	Up 5.7%	Down 8.4%
OTP	Up 7.3%	Up 12.1%	Down 3.8%



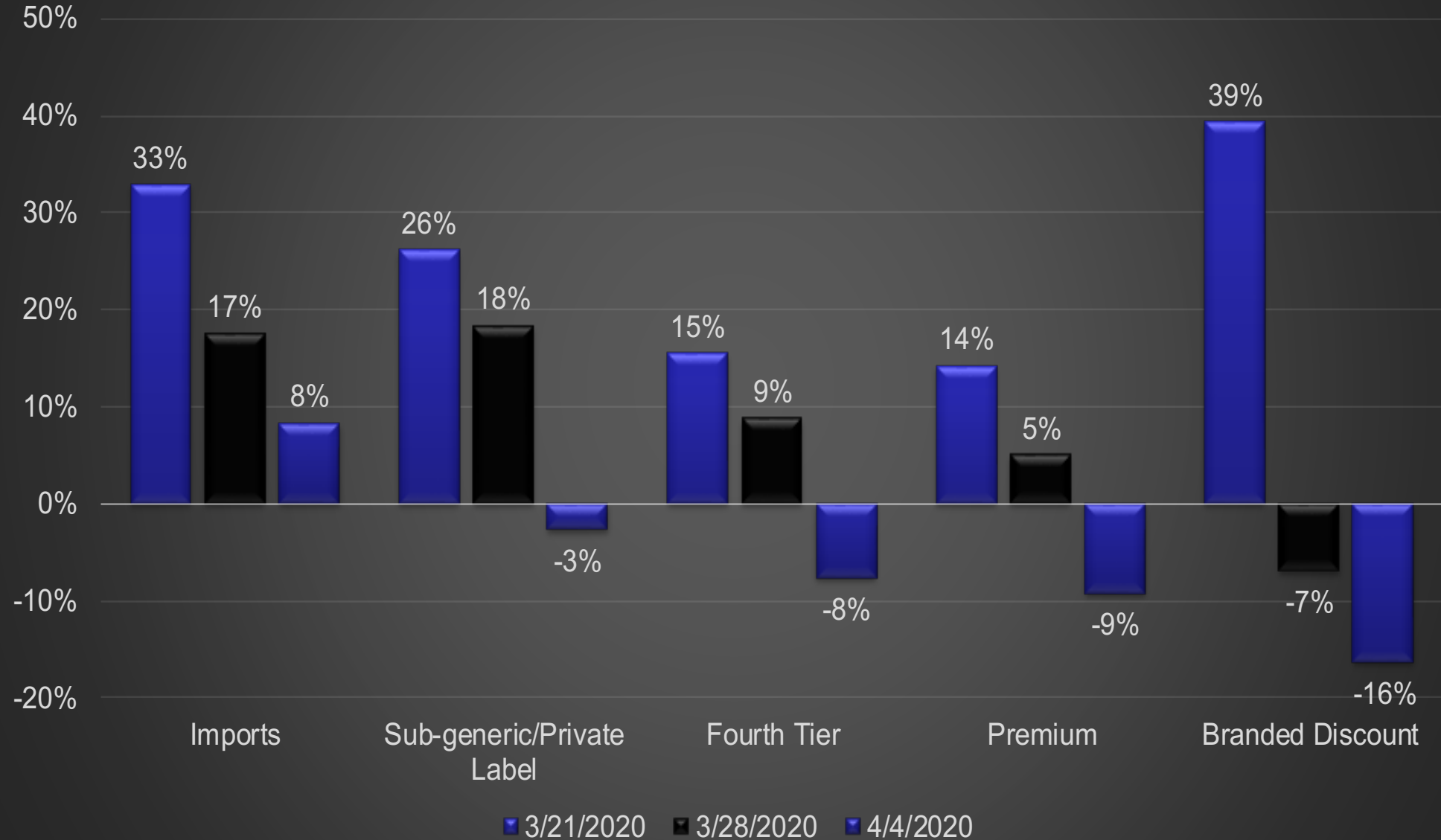
Category Performance – Cigarettes & OTP - Units

Category	3 weeks ending 3/21/20	Week ending 3/28/20	Week ending 4/4/20
Cigarettes	Up 3.4%	Up 3%	Down 9.4%
OTP	Up 7.6%	Up 9.2%	Up 1.5%

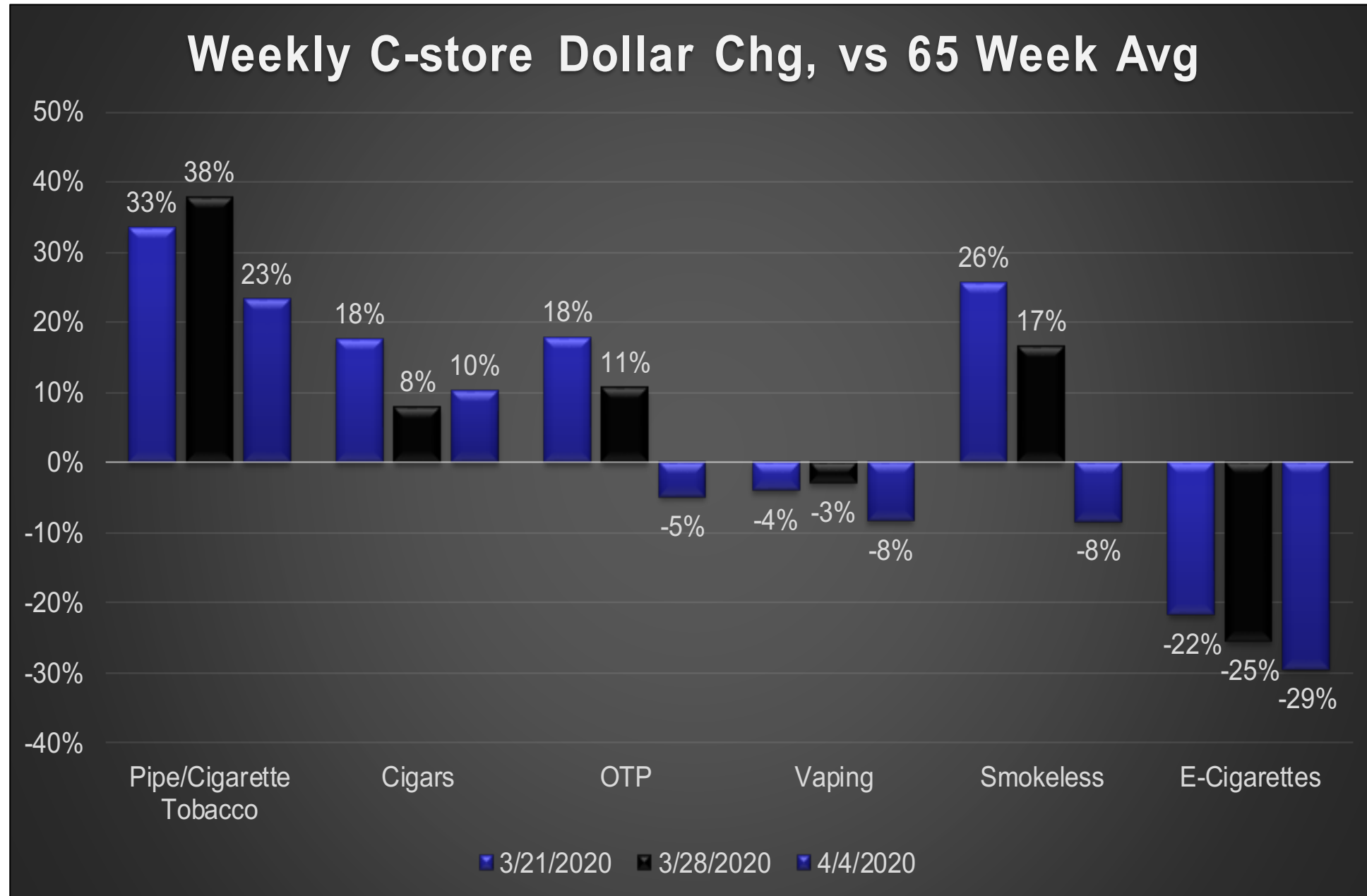


Sub Category Performance – Cigarettes- Dollars

Weekly Dollar Chg, vs 65 Week Avg

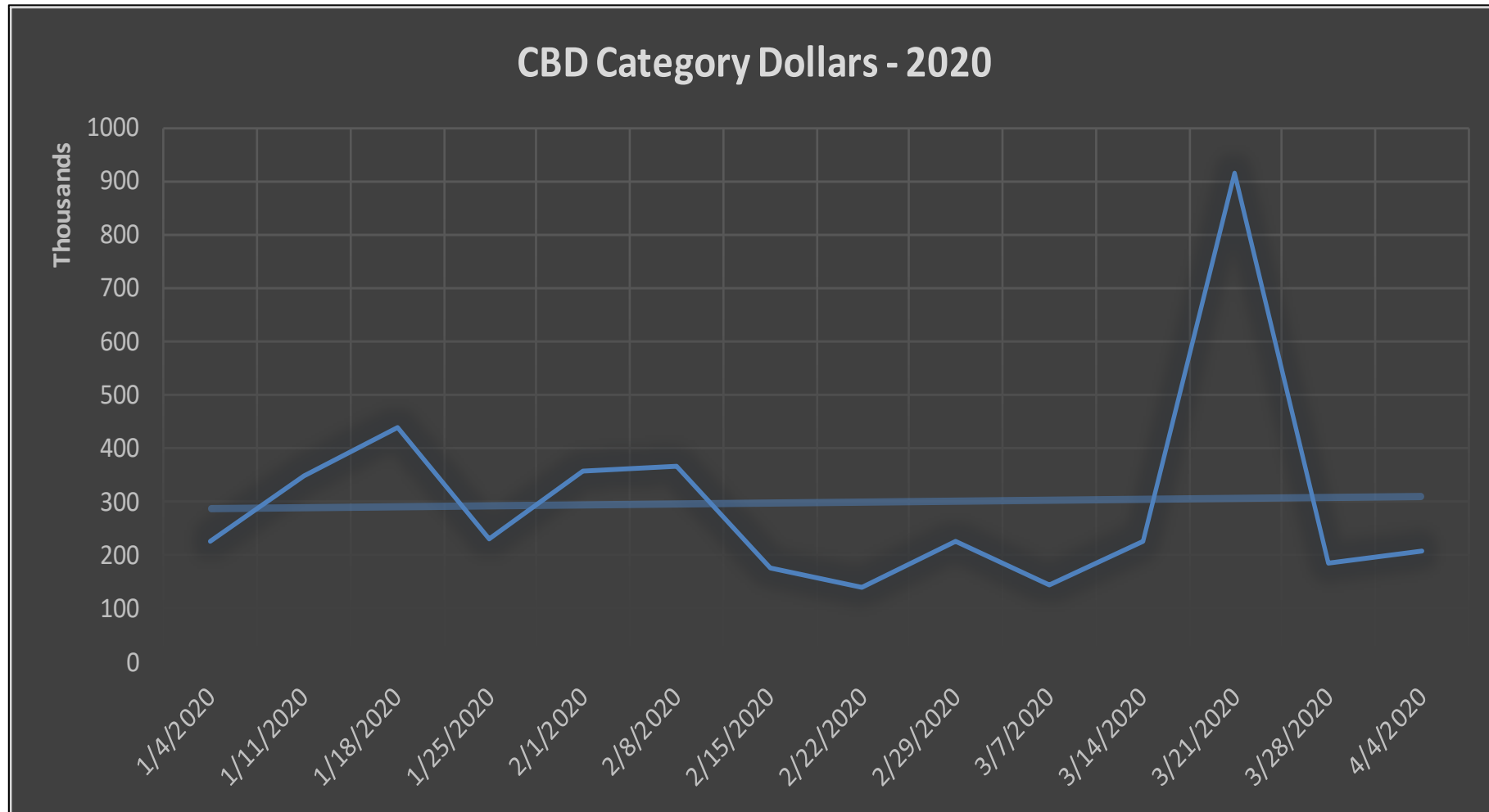


Sub Category Performance – Other Tobacco Products - Dollars



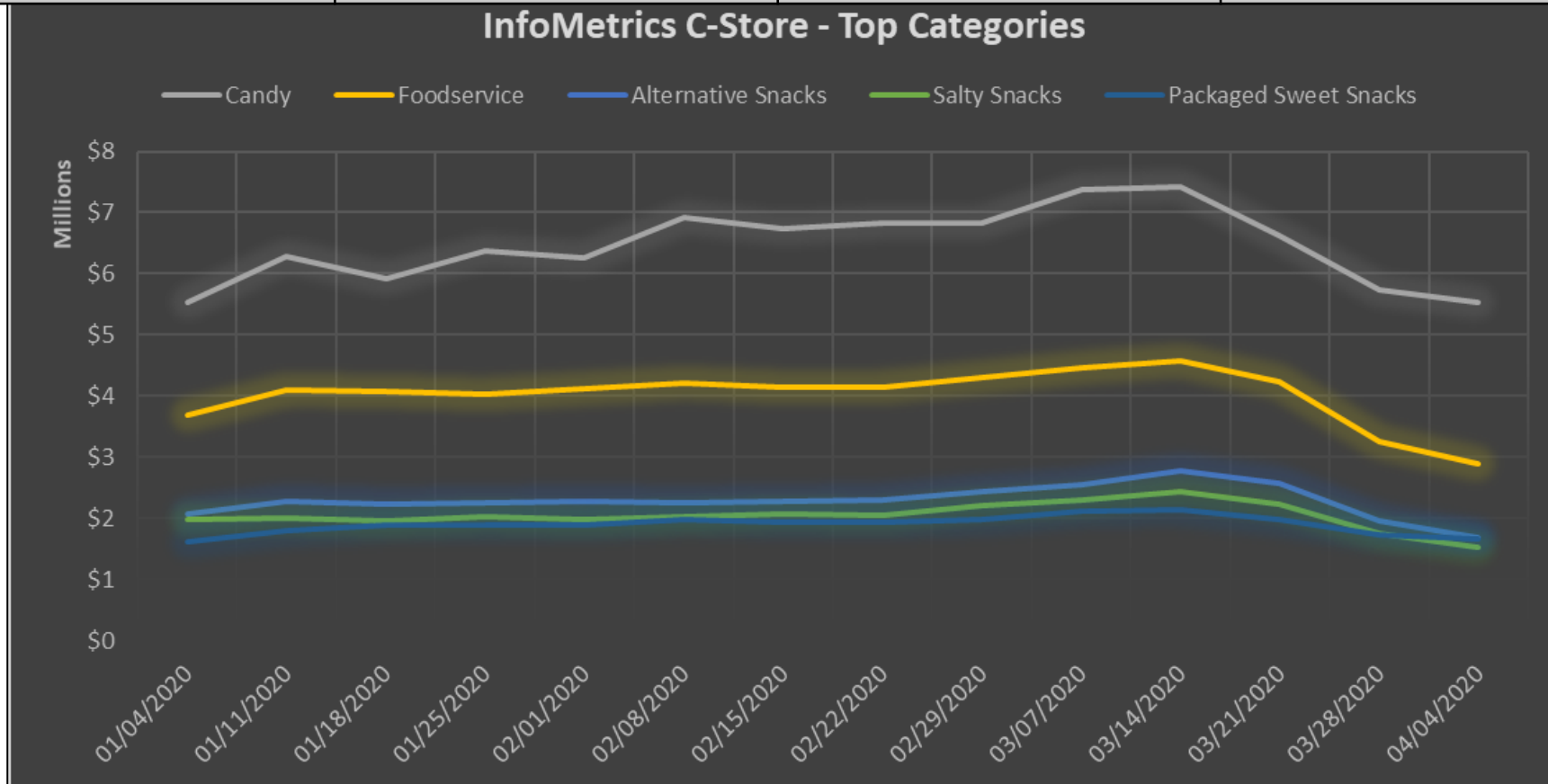
Category Performance – CBD - Dollars

Category	3 weeks ending 3/21/20	Week ending 3/28/20	Week ending 4/4/20
CBD	Up 25.7%	Down 45.2%	Down 38.7%



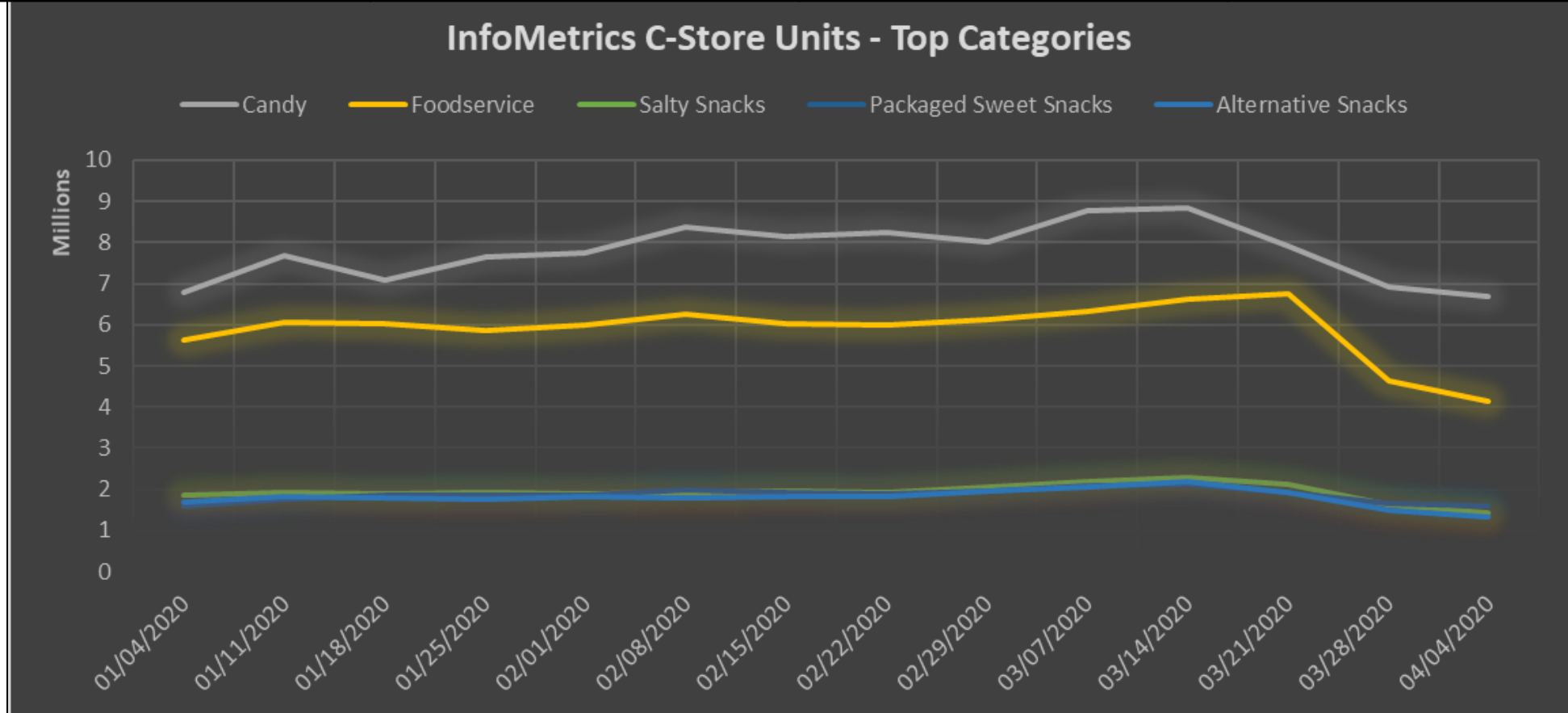
Category Performance – Non-Tobacco Top Categories - Dollars

Category	3 weeks ending 3/21/20	Week ending 3/28/20	Week ending 4/4/20
Candy	Up 6.3%	Down 14.7%	Down 17.6%
Foodservice	Down 0.7%	Down 27%	Down 35.2%
Salty Snacks	Up 0.9%	Down 23.9%	Down 33.2%
Pkg Sweet Snacks	Up 5.4%	Down 12.2%	Down 15.7%
Alternative Snacks	Up 1.9%	Down 24%	Down 34.6%

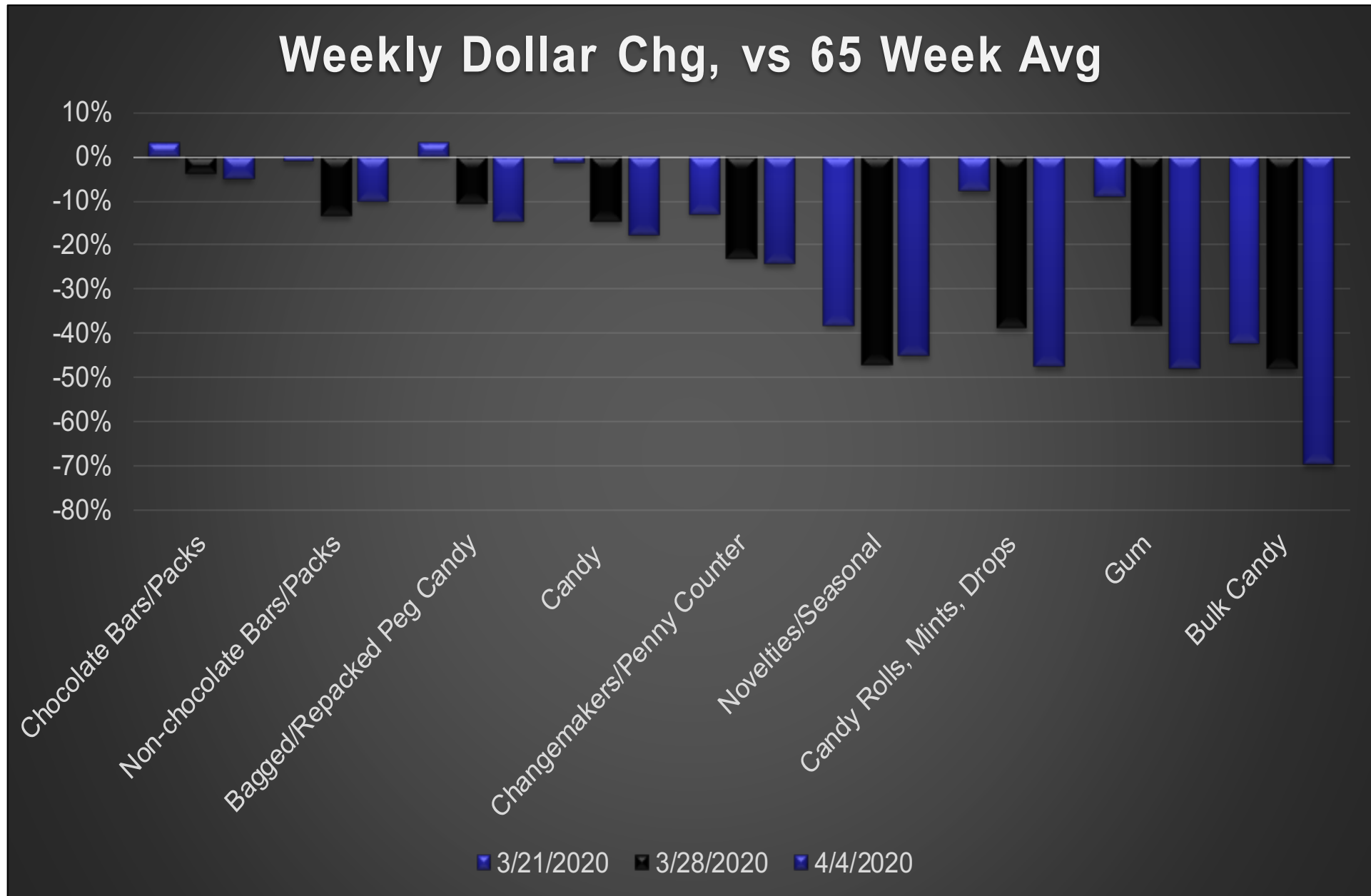


Category Performance – Non-Tobacco Top Categories - Units

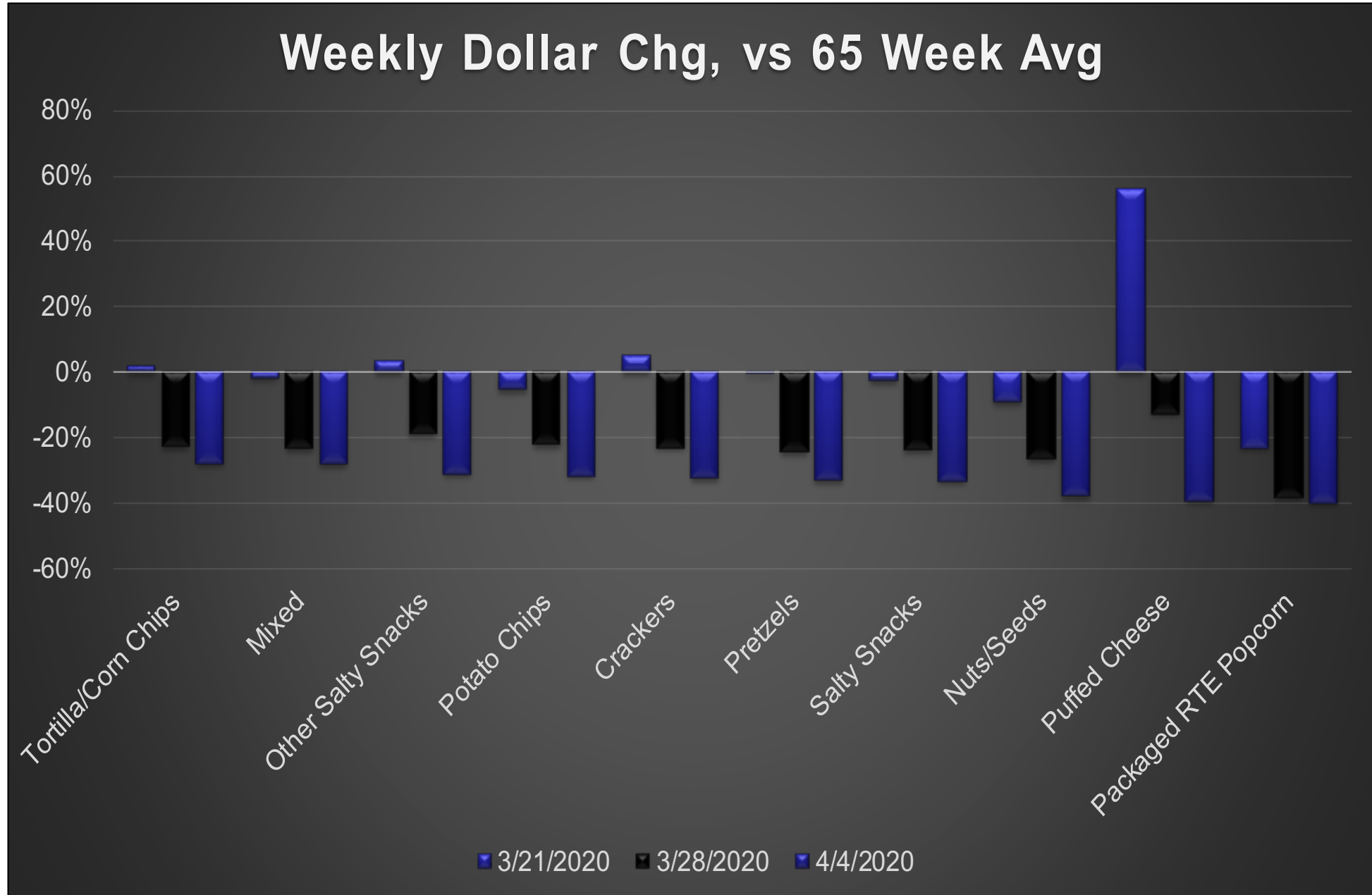
Category	3 weeks ending 3/21/20	Week ending 3/28/20	Week ending 4/4/20
Candy	Down 0.3%	Down 18.9%	Down 21.6%
Foodservice	Up 0.6%	Down 28.8%	Down 36.5%
Salty Snacks	Down 0.6%	Down 26.2%	Down 36.3%
Pkg Sweet Snacks	Up 3.4%	Down 15.8%	Down 20%
Alternative Snacks	Down 0.9%	Down 27.2%	Down 35.4%



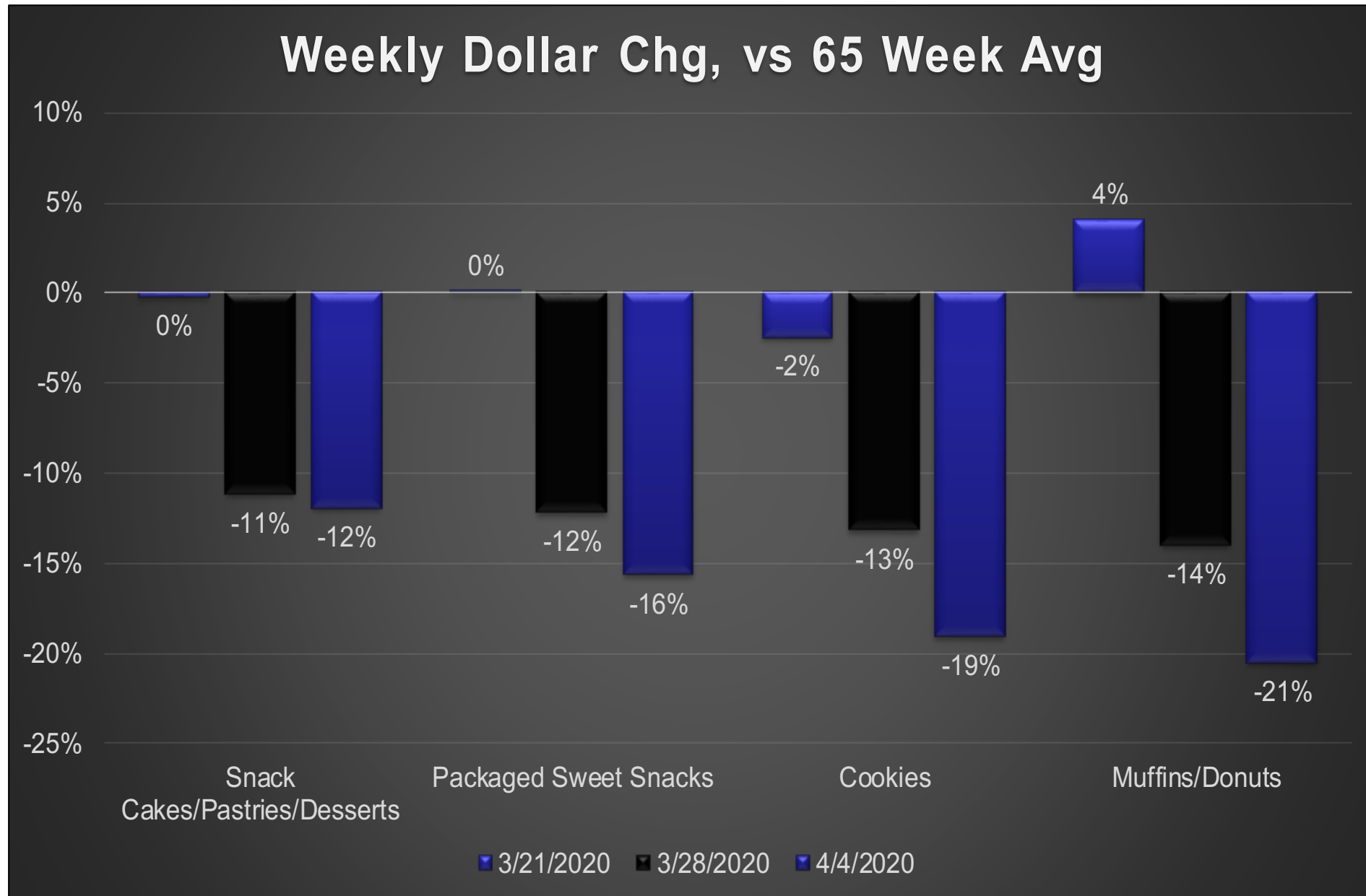
Sub Category Performance – Candy - Dollars



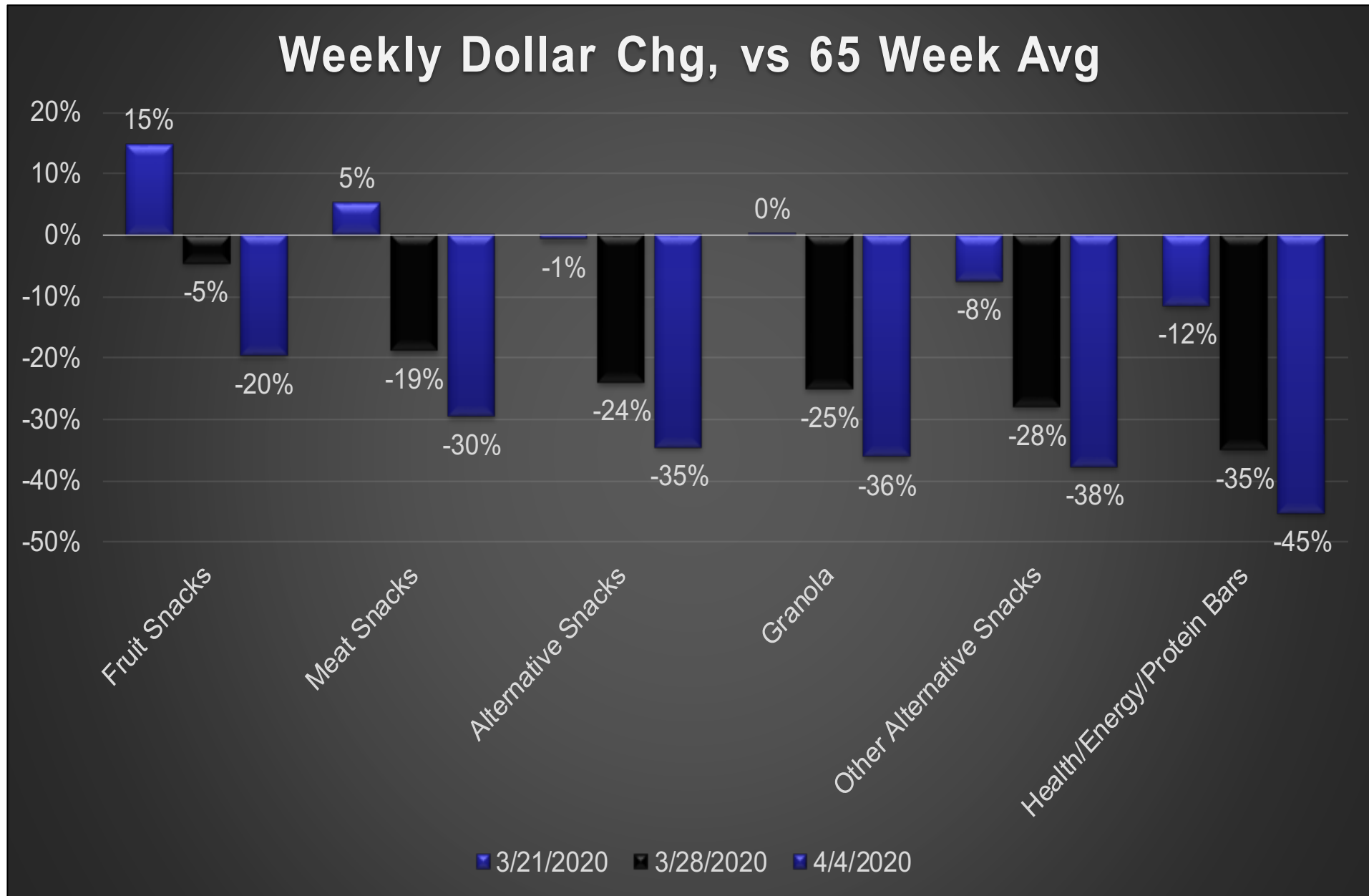
Sub Category Performance – Salty Snacks - Dollars



Sub Category Performance – Packaged Sweet Snacks- Dollars

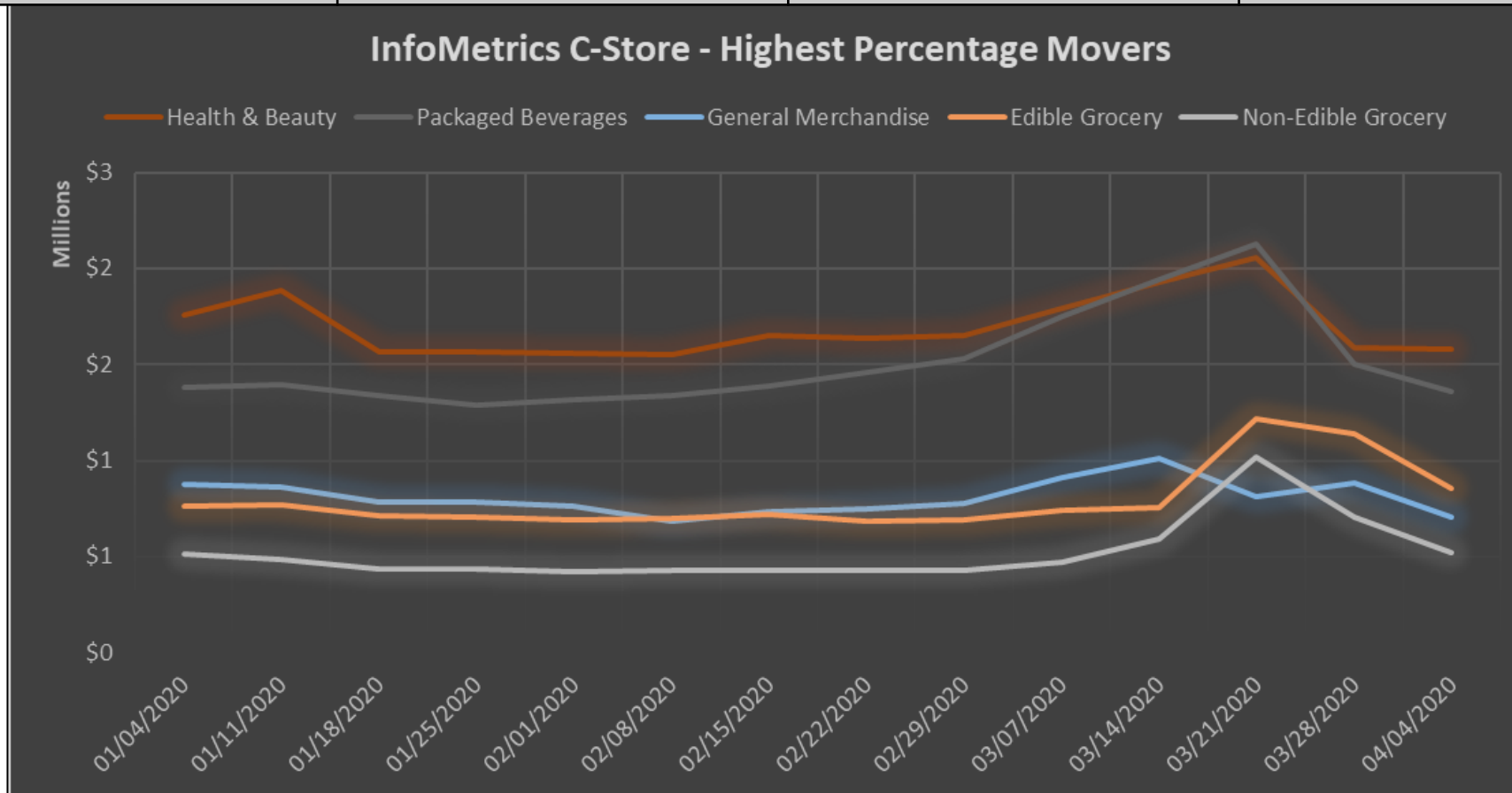


Sub Category Performance – Alternative Snacks- Dollars



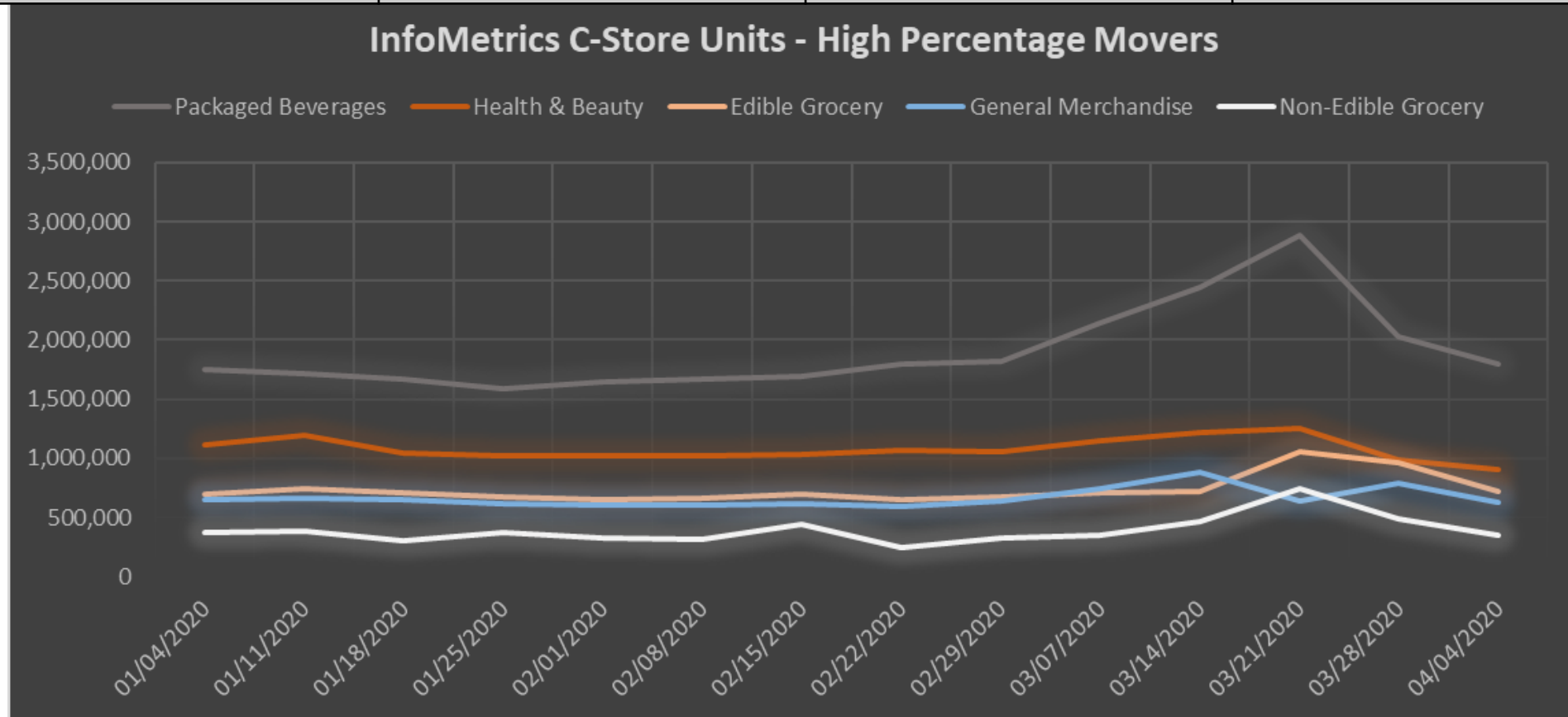
Category Performance – Non Tobacco - Dollars

Category	3 weeks ending 3/21/20	Week ending 3/28/20	Week ending 4/4/20
Packaged Beverages	Up 15.7%	Down 10.5%	Down 19.1%
Health & Beauty	Up 3.1%	Down 14.9%	Down 15.4%
Edible Grocery	Up 18%	Up 48.8%	Up 11.6%
General Merchandise	Down 3.3%	Down 6.6%	Down 25.2%
Non-Edible Grocery	Up 40.4%	Up 42.9%	Up 5%

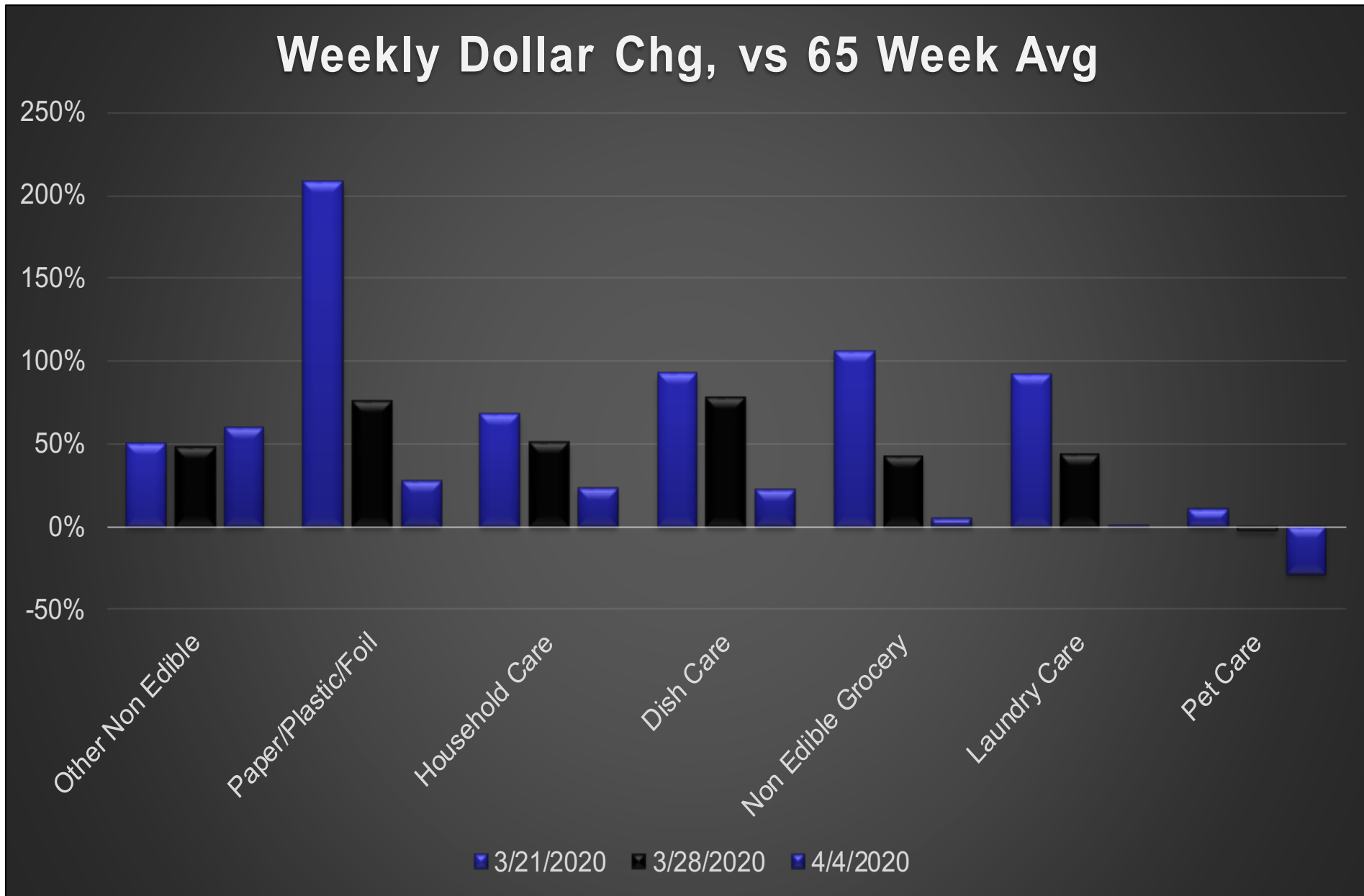


Category Performance - Units

Category	3 weeks ending 3/21/20	Week ending 3/28/20	Week ending 4/4/20
Packaged Beverages	Up 16.1%	Down 5.3%	Down 16.5%
Health & Beauty	Up 5.9%	Down 13.8%	Down 20.8%
Edible Grocery	Up 11.1%	Up 28.8%	Down 3.4%
General Merchandise	Up 3.9%	Up 7.8%	Down 13.8%
Non-Edible Grocery	Up 42%	Up 33.6%	Down 3.7%



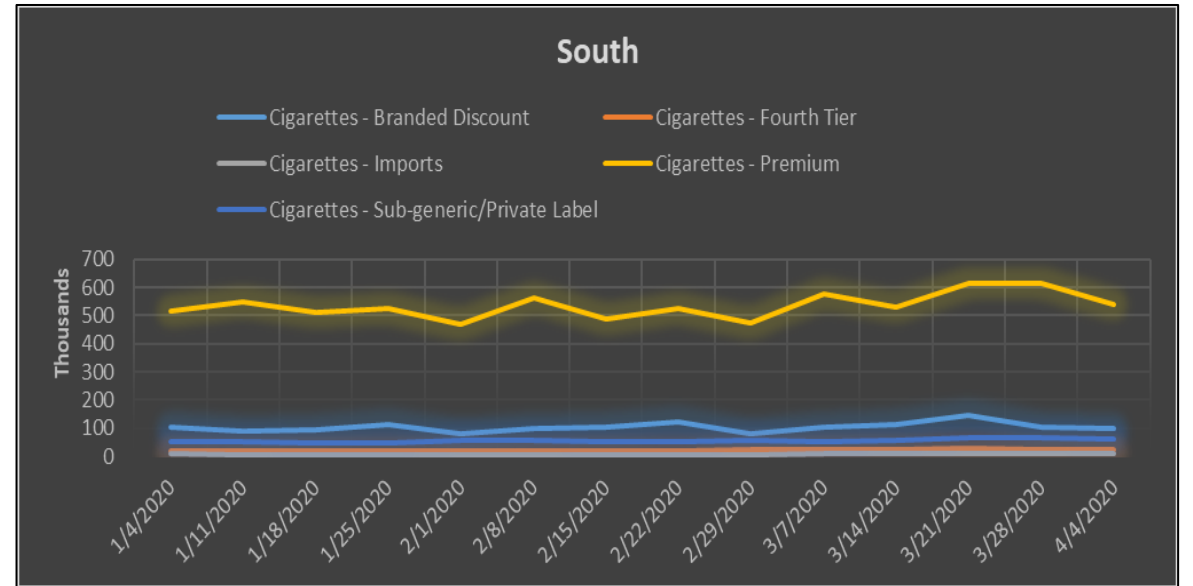
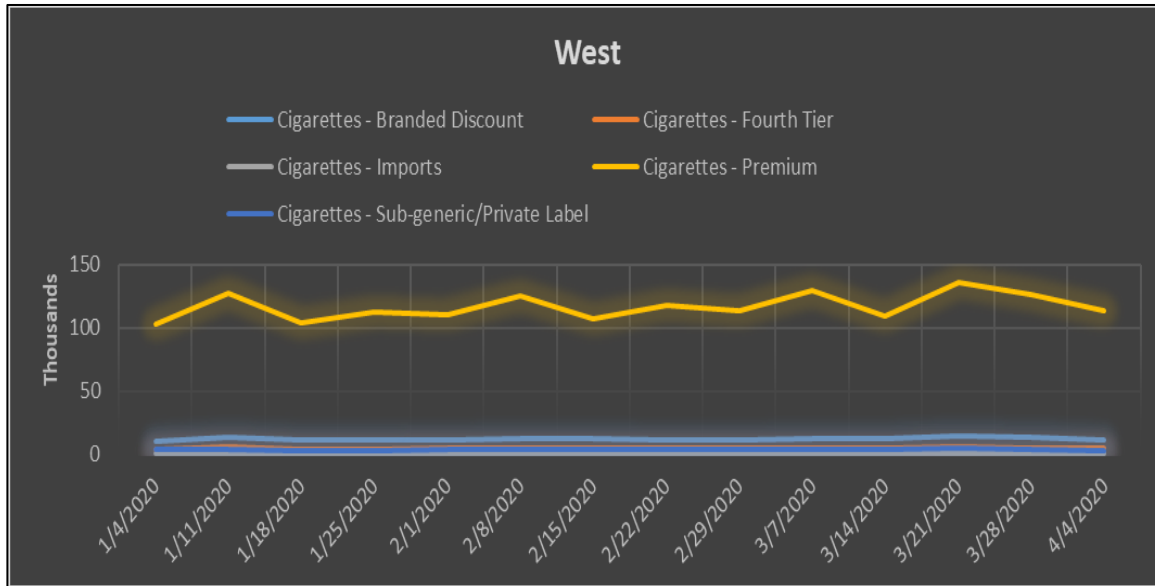
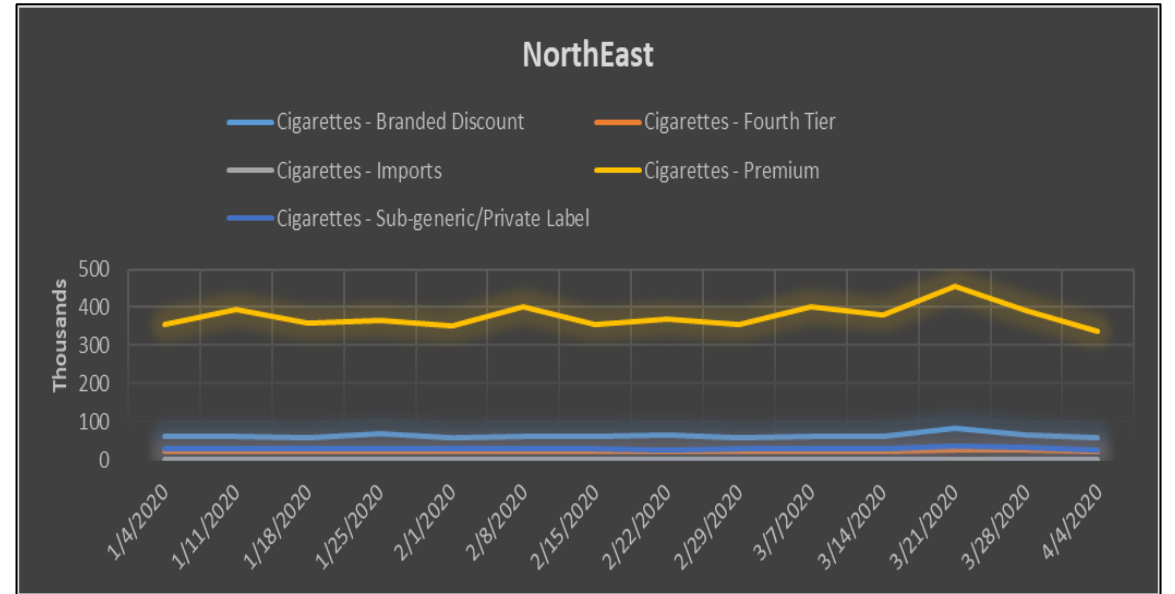
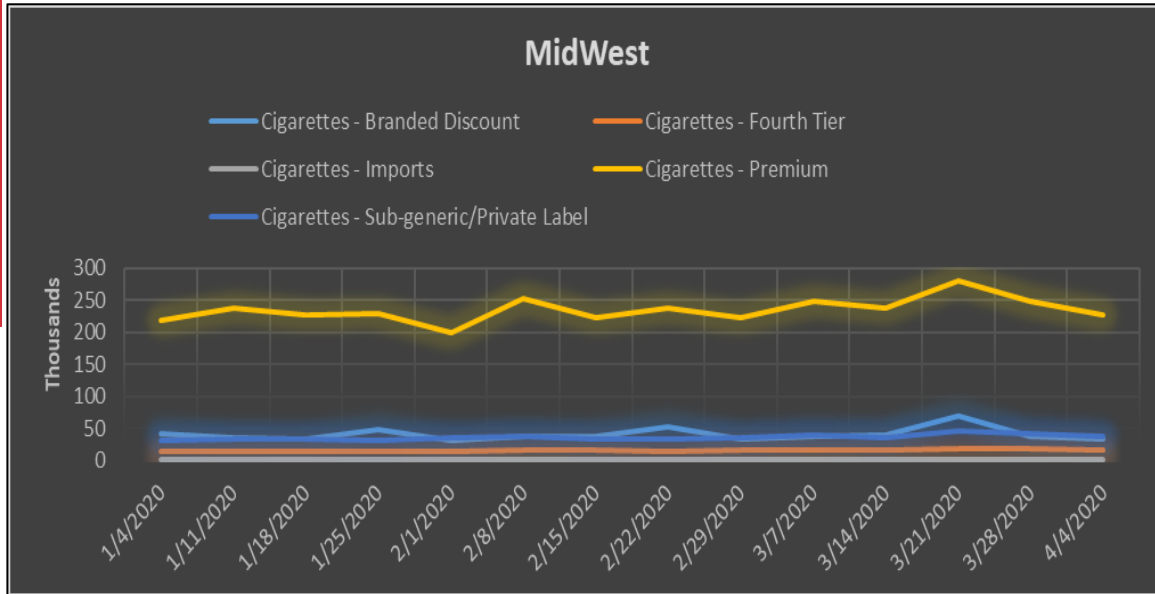
Sub Category Performance – Non Edible Grocery



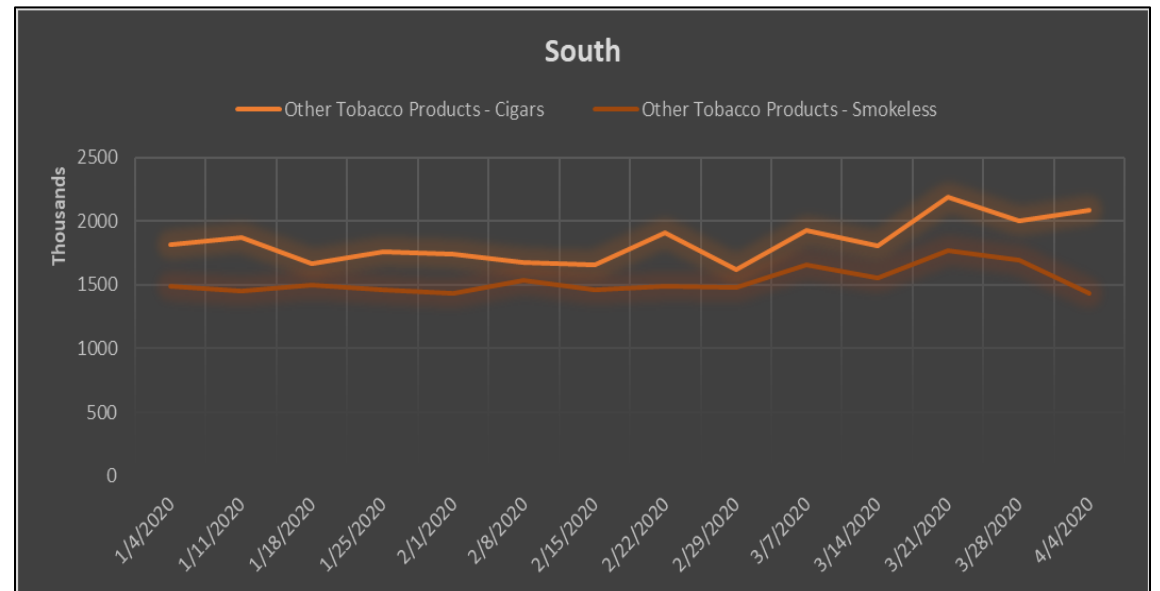
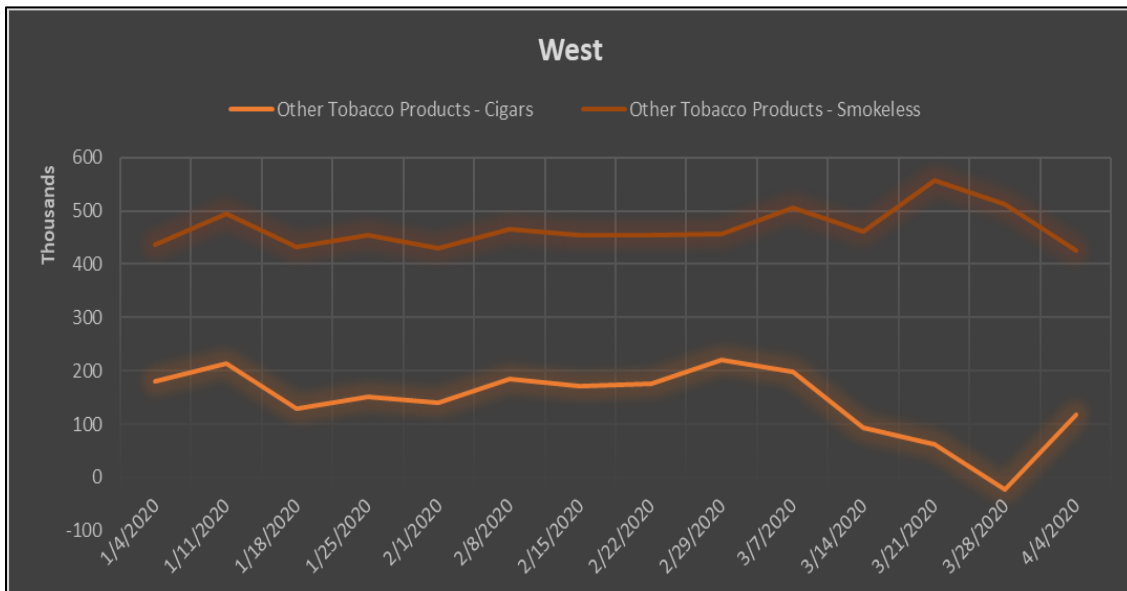
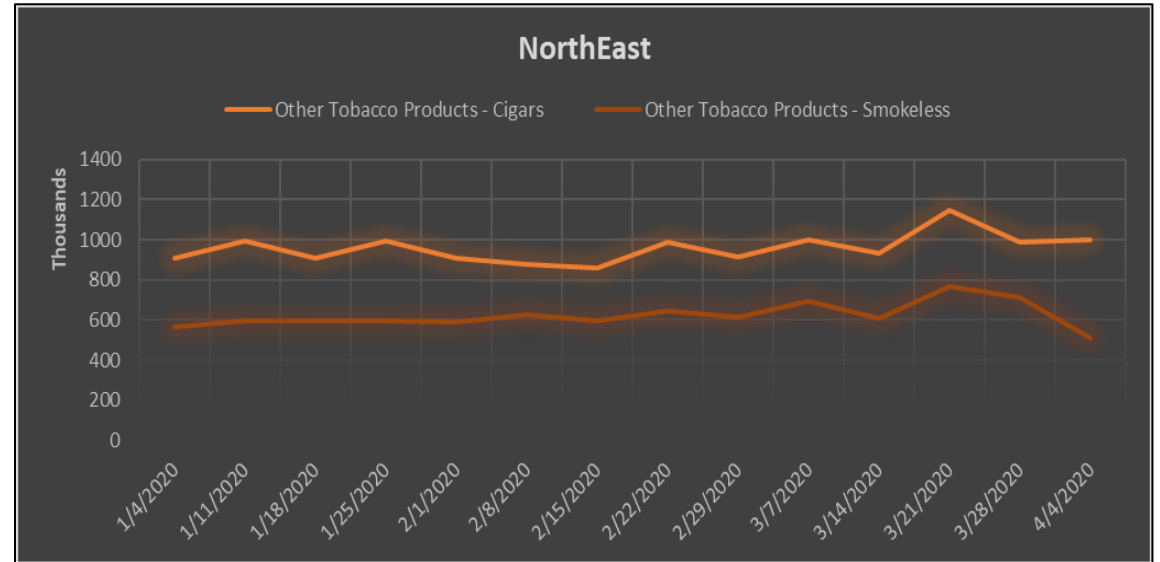
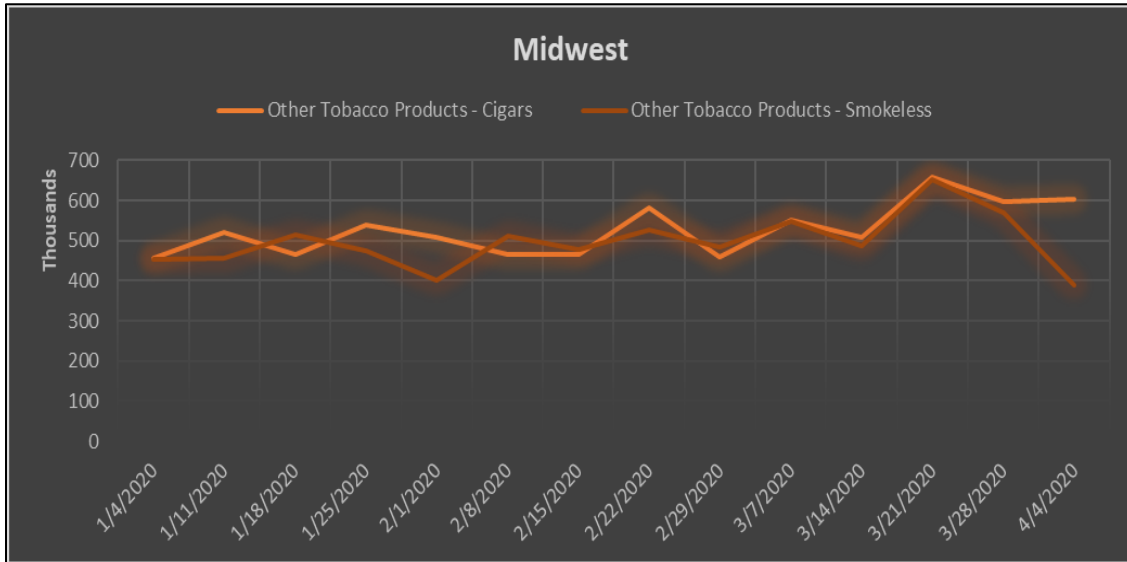


Regional Performance

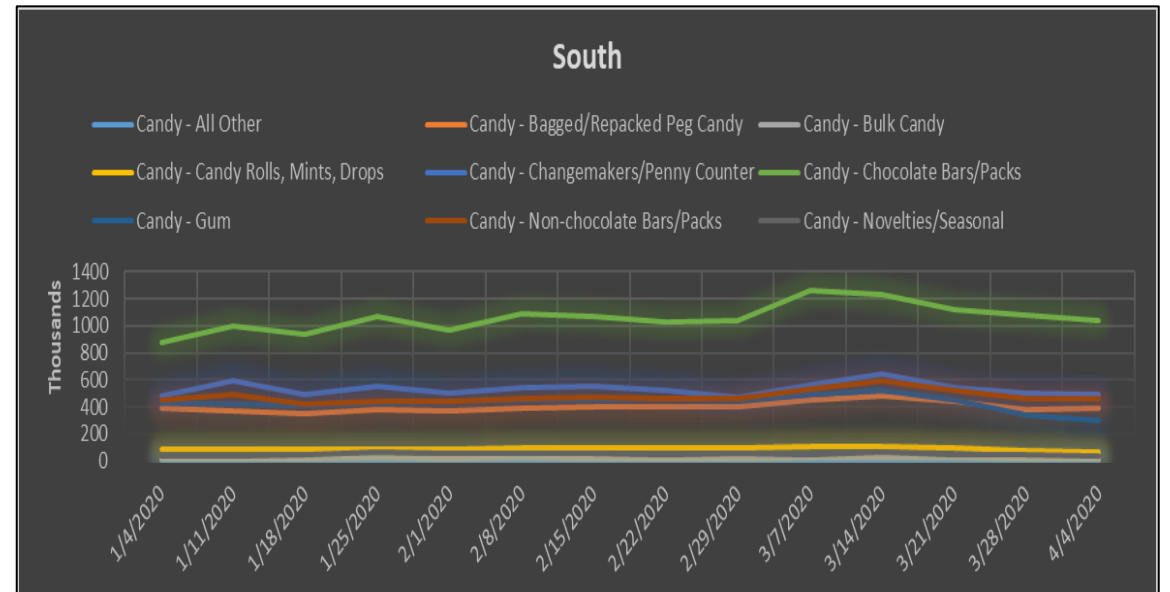
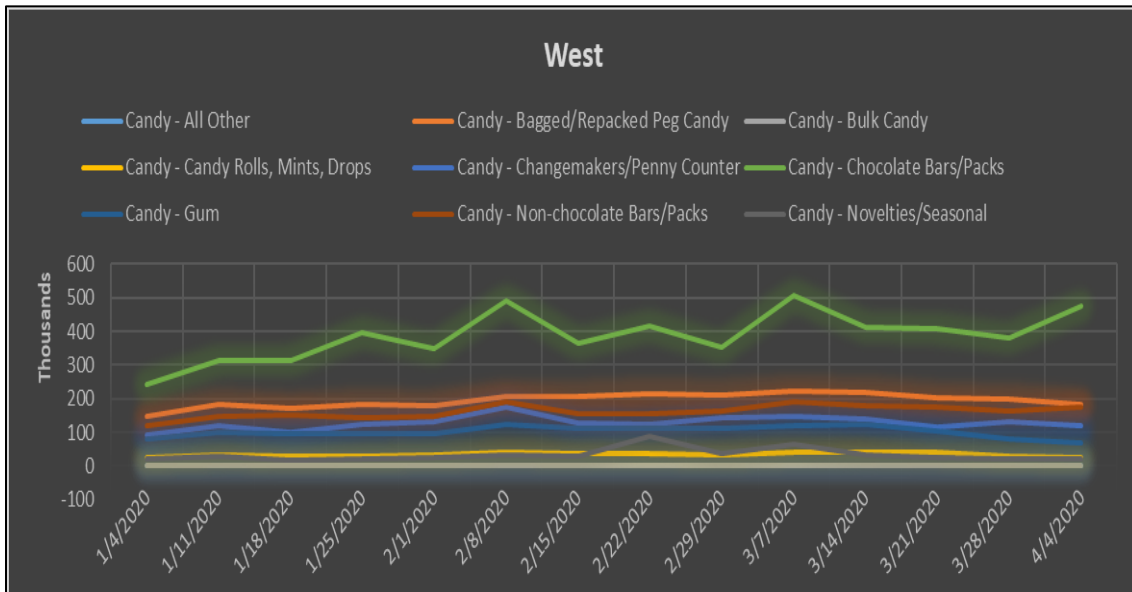
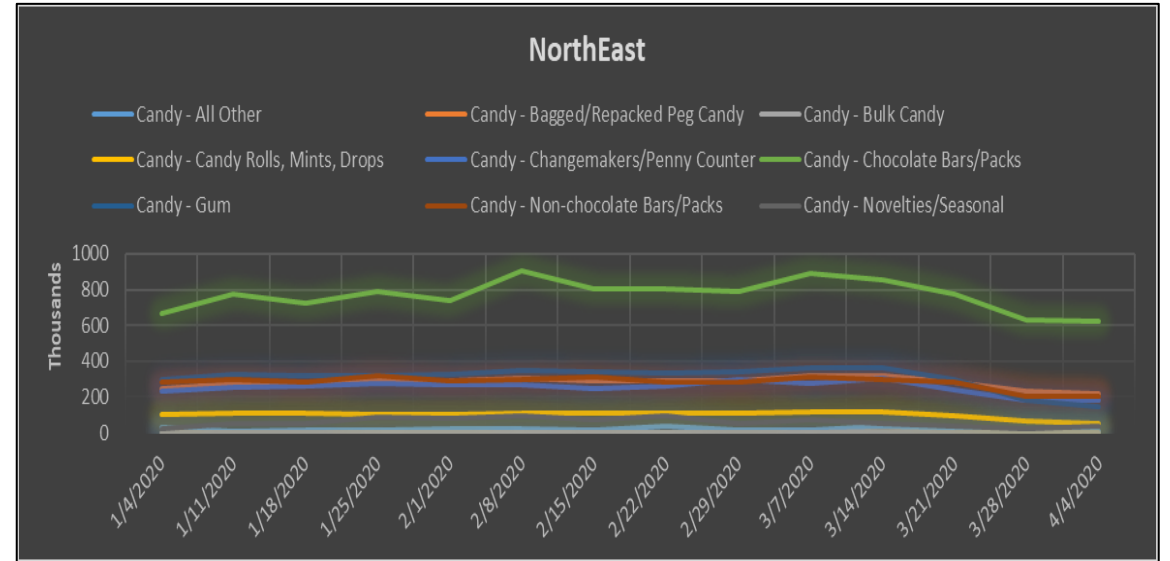
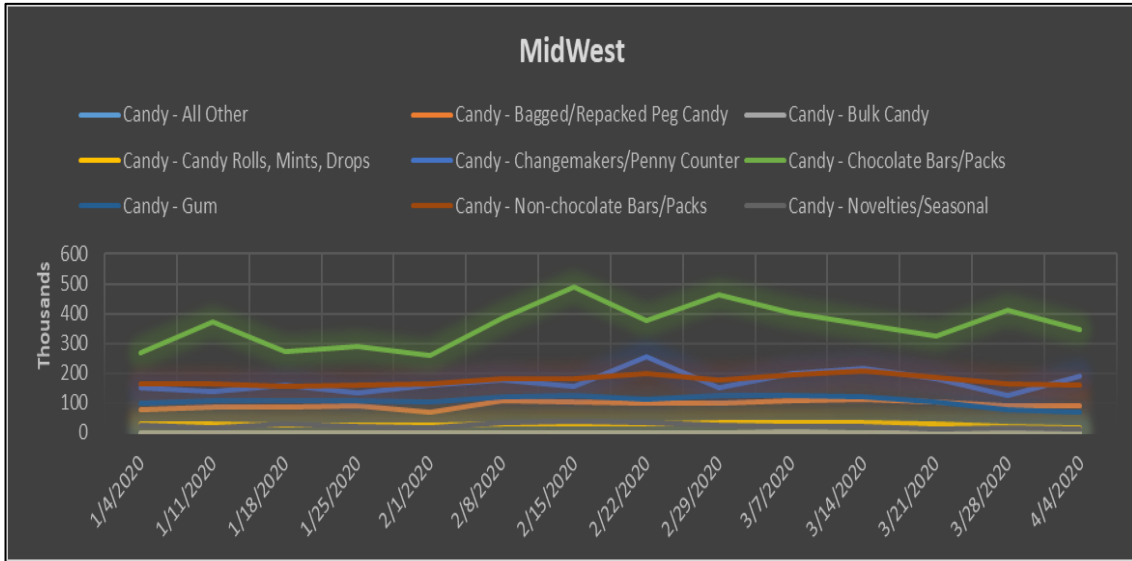
Regional Performance - Cigarettes



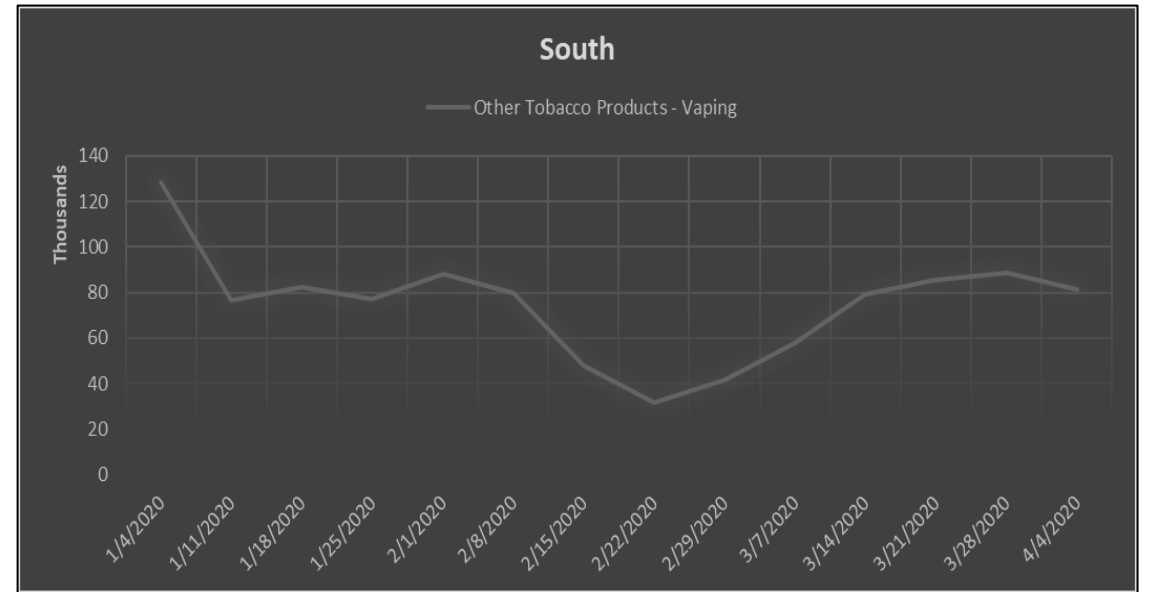
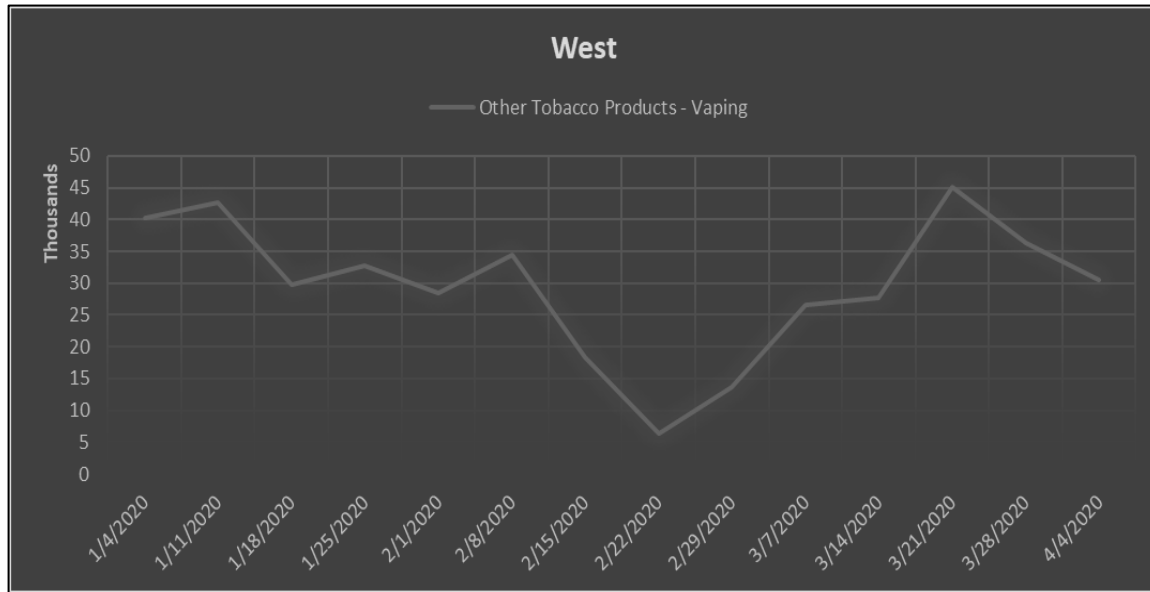
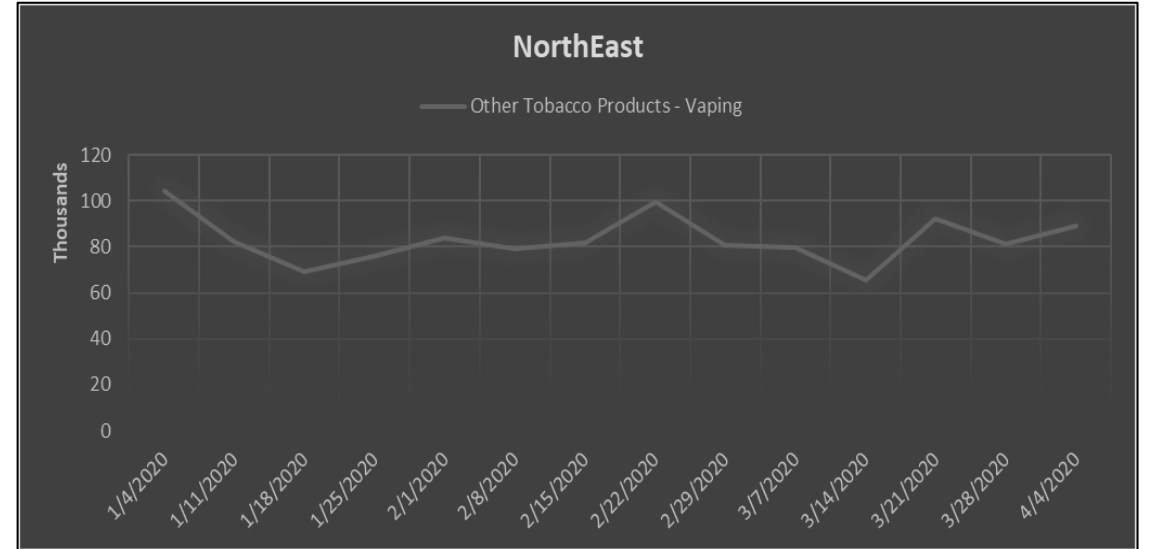
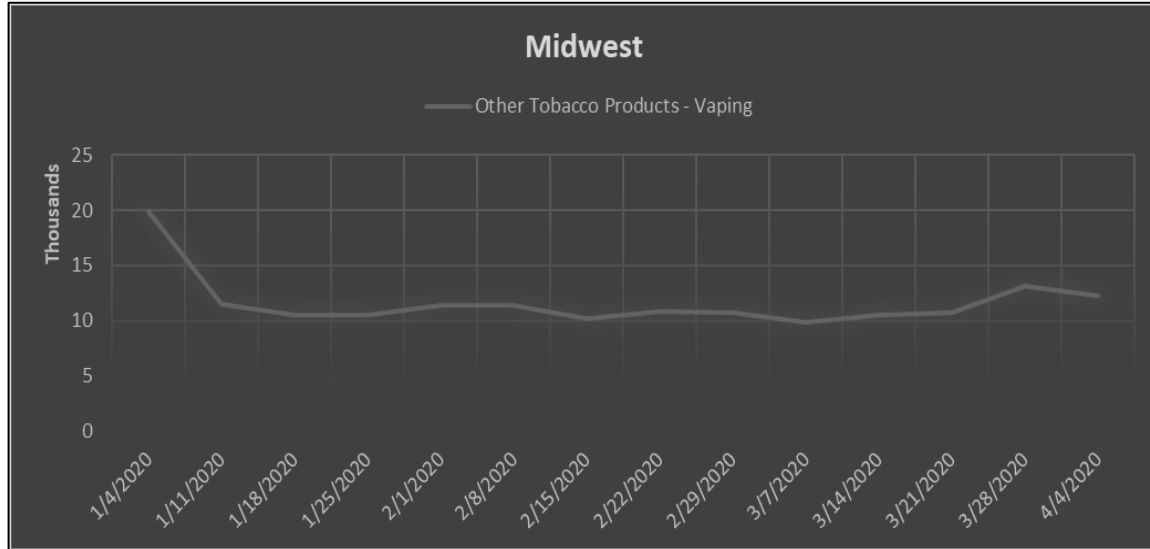
Regional Performance – Smokeless & Cigars



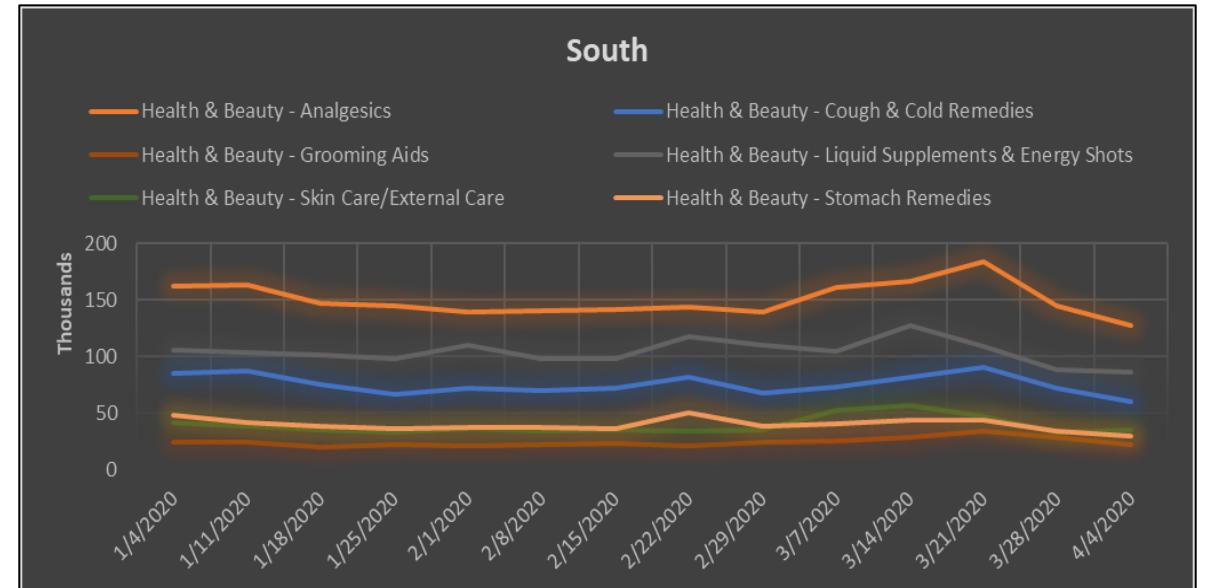
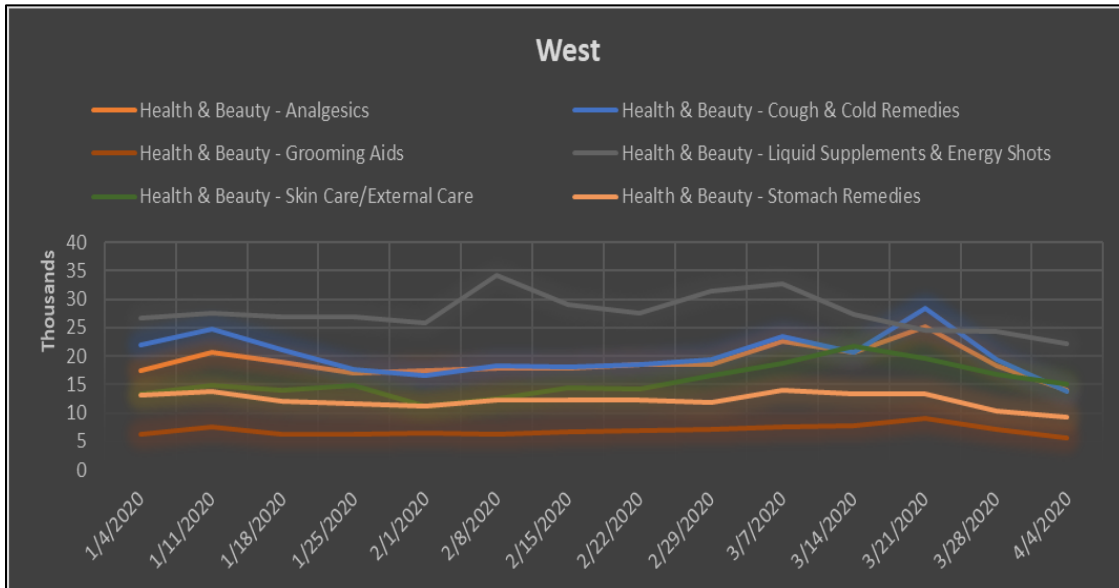
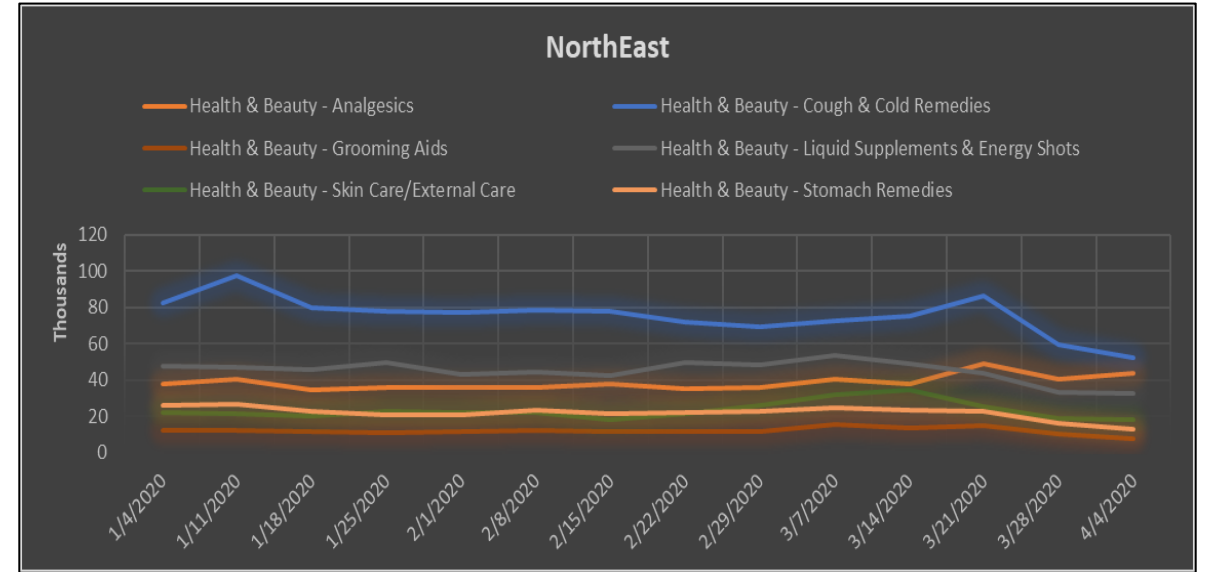
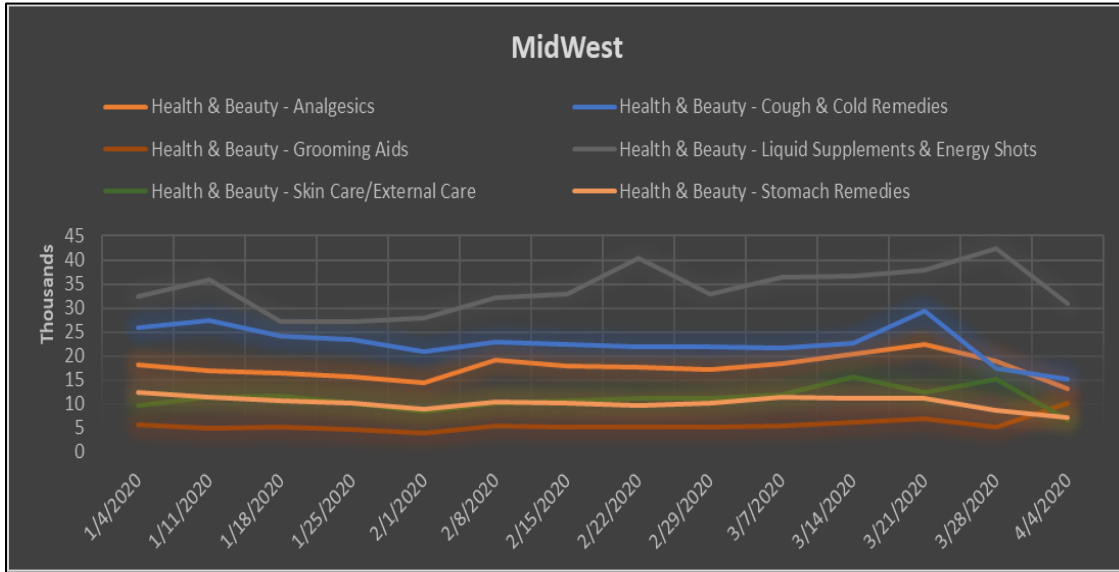
Regional Performance - Candy



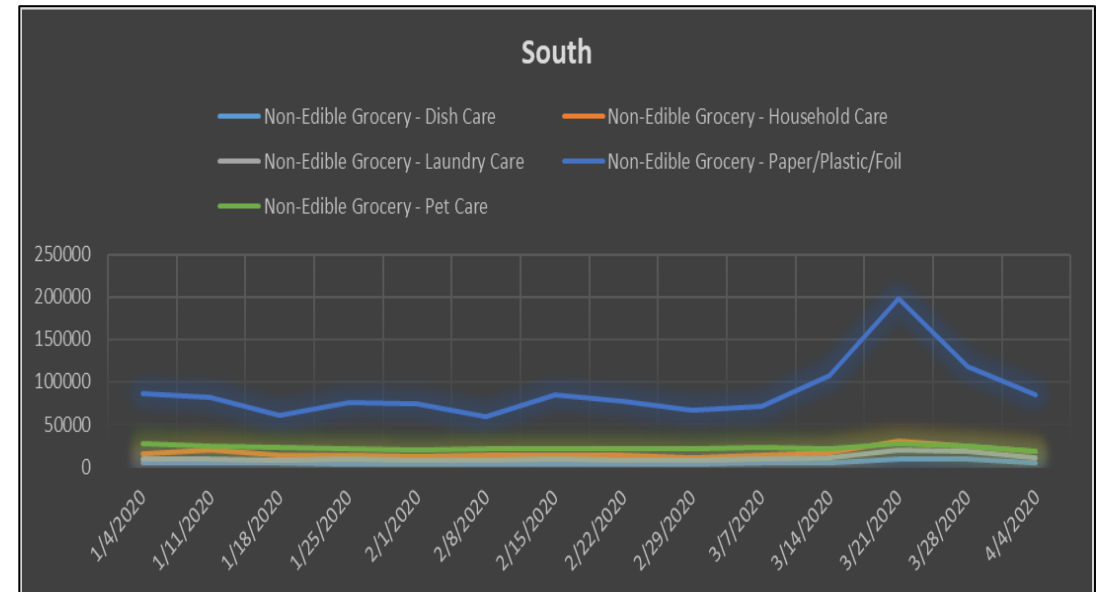
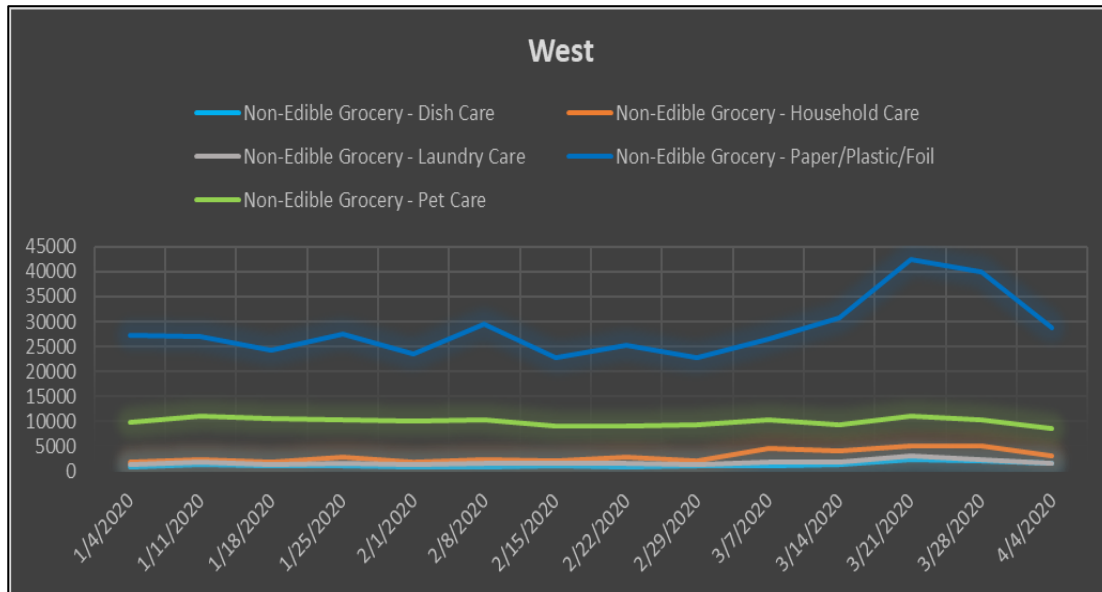
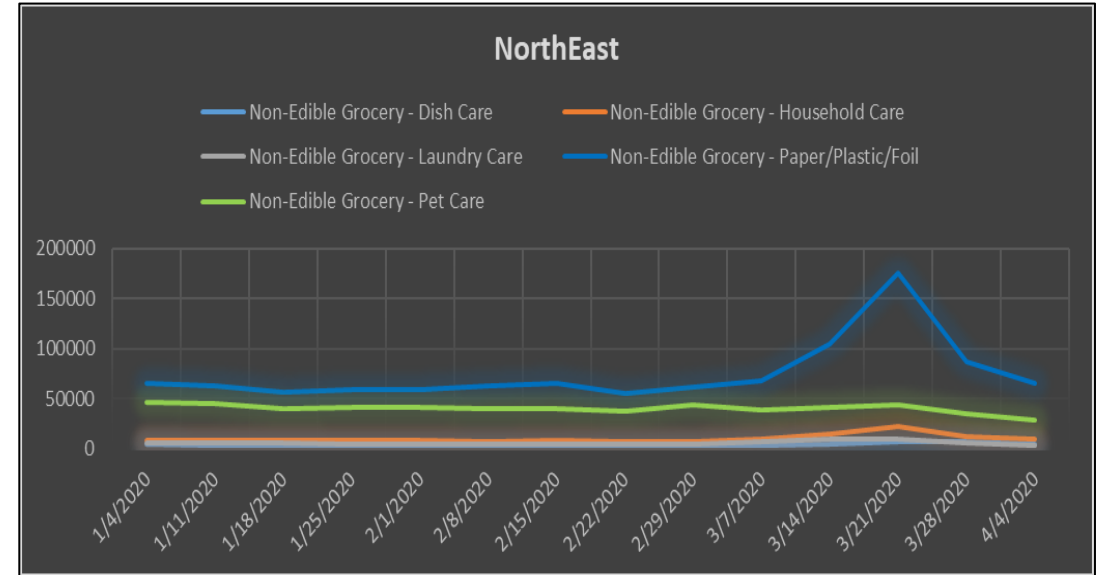
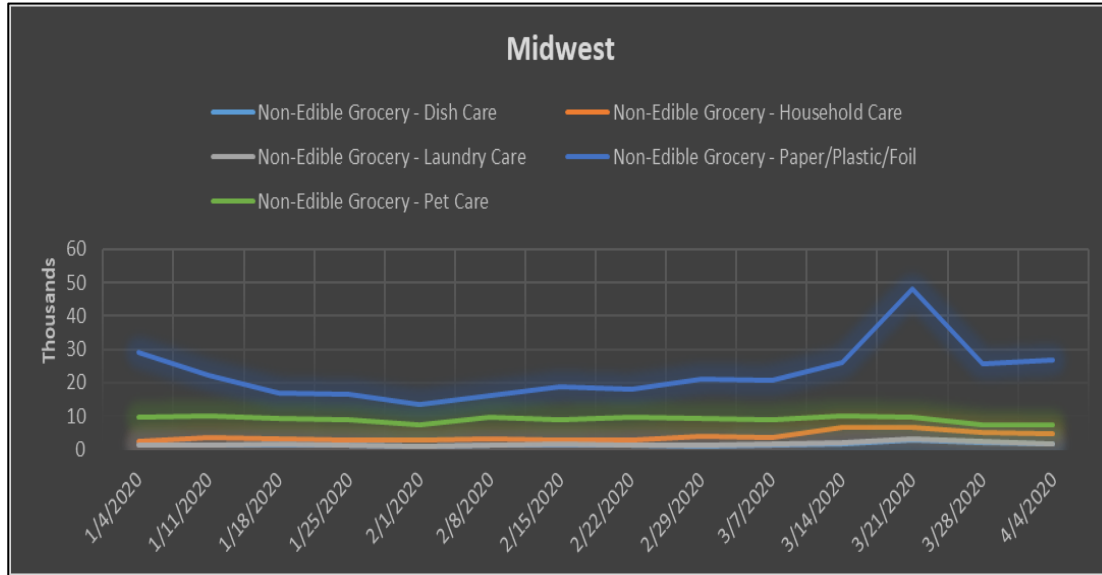
Regional Performance - Vaping



Regional Performance – Health & Beauty



Regional Performance – Non-Edible Grocery



Summary

- Week ending 3/21/20 showed a significant increase in volume from wholesale to retail
- Cigarette Sales reflected an increase of close to 20% in week ending 3/21/20, however showing declines for the following weeks
- Week ending 4/4/20 shows a precipitous decline in sales to retail across most categories



**Thank You
&
Stay Safe and Healthy!**

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