

# ***Today's webinar will begin momentarily...***

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- **Close additional browser windows and online applications.**
- **If you experience technical difficulties, please close your browser and log back in.**



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## Marketplace Trends During COVID-19 – Part 2

*Warehouse-delivered Products*

*May 28, 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*
- *Sub Category Performance*
- *Regional Performance*
- *Summary*

## Marketplace Behavior

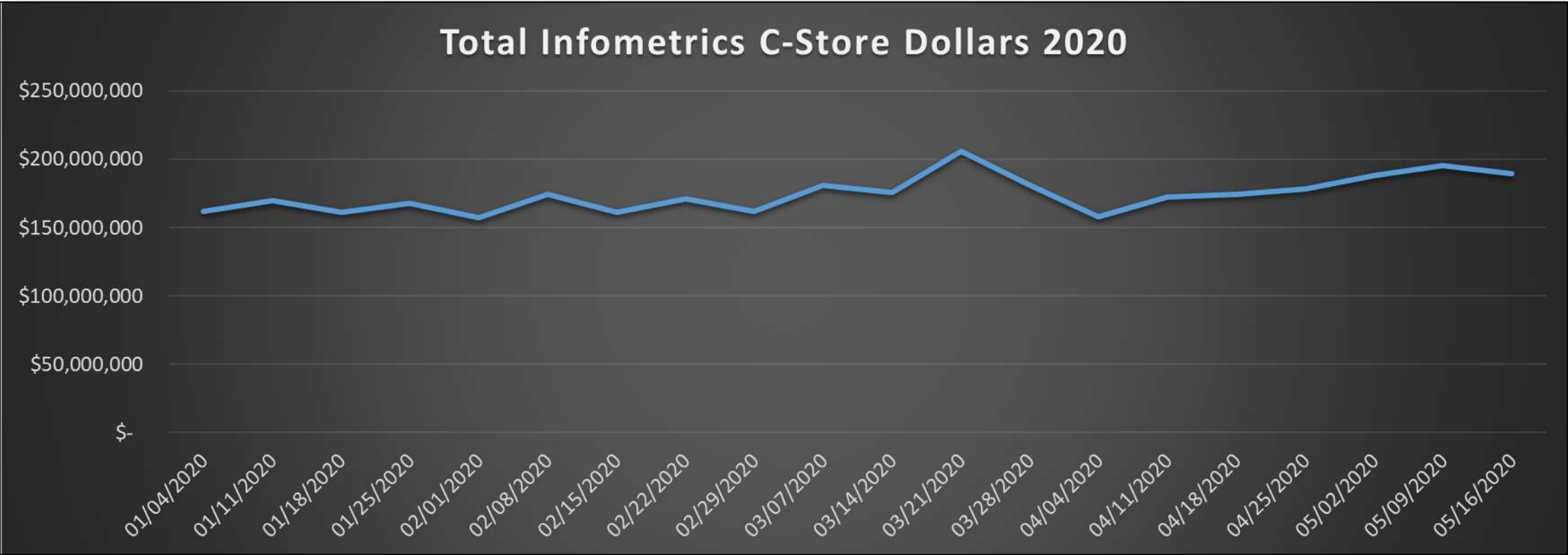
- *All states re-opening at varying degrees*
- *Some stores limiting the number of customers entering*
- *Stores selling new items*
- *Online grocery/delivery services*
- *Store cleanliness/Employee Safety*



# 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	4/4/20	4/11/20	4/18/20	4/25/20	5/2/20	5/9/20	5/16/20
Total C-Store	Up 5.5%	Up 1.9%	Down 11.4%	Down 8.2%	Down 1.9%	Up .1%	Up 5.8%	Up 8.6%	Up 6.7%

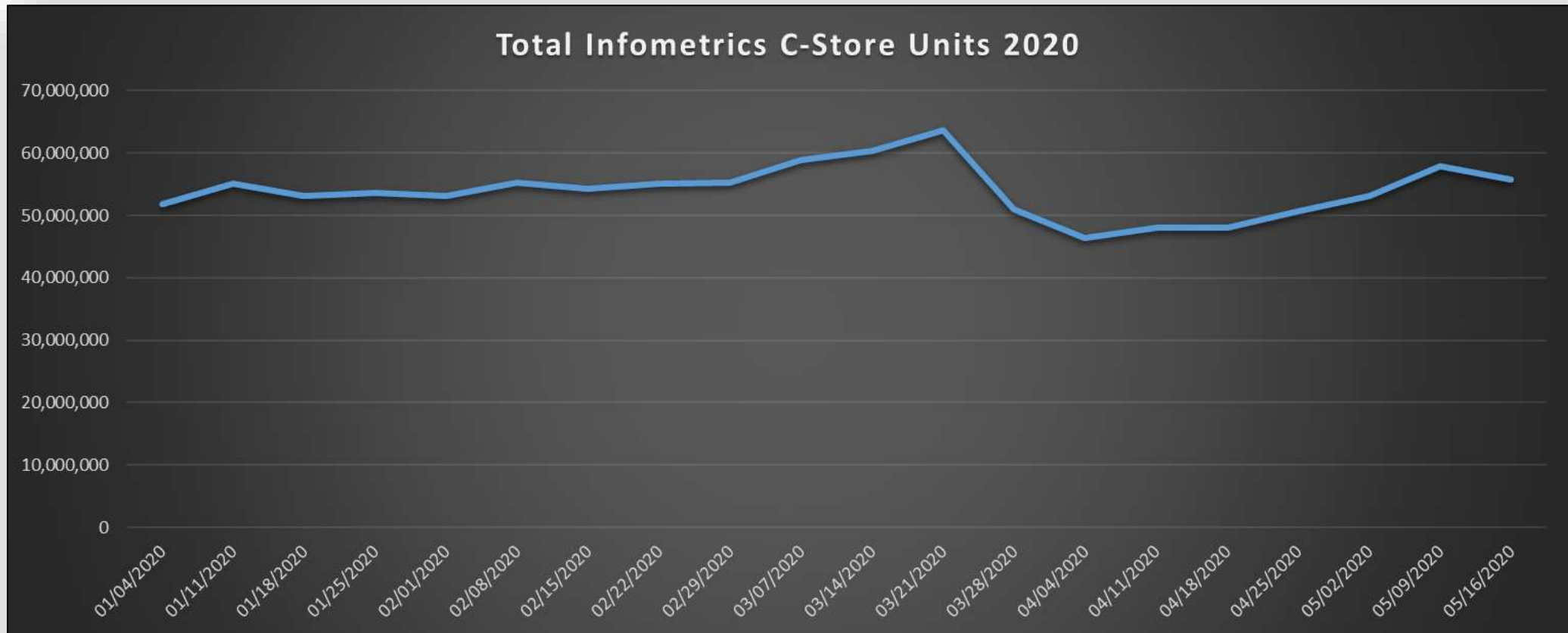




## C-Store Performance - Units

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

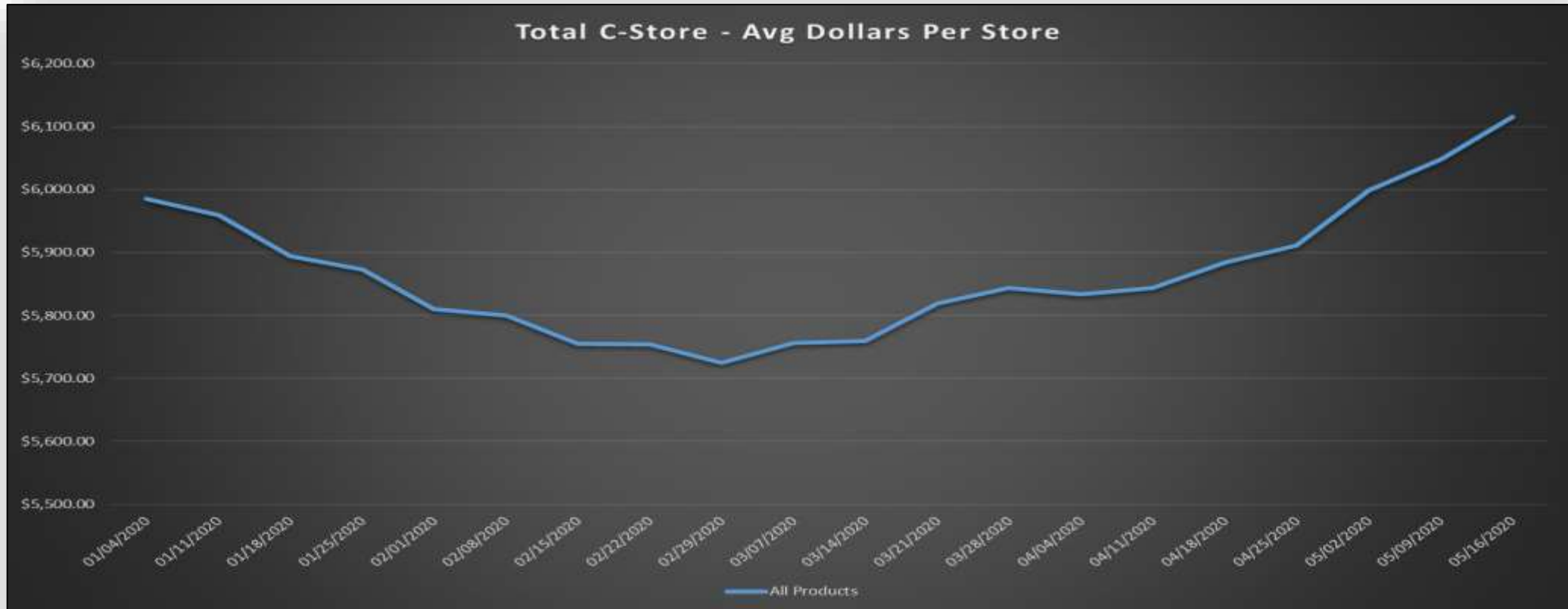
Category	3 weeks ending 3/21/20	Week ending 3/28/20	Week ending 4/4/20	4/11/20	4/18/20	4/25/20	5/2/20	5/9/20	5/16/20
Total C-Store	Up 2%	Down 14.7%	Down 22.9%	Down 24%	Down 19.4%	Down 15.3%	Down 11%	Down 5.4%	Down 6.5%



# C-Store Performance – Avg Dollars/Store/Week

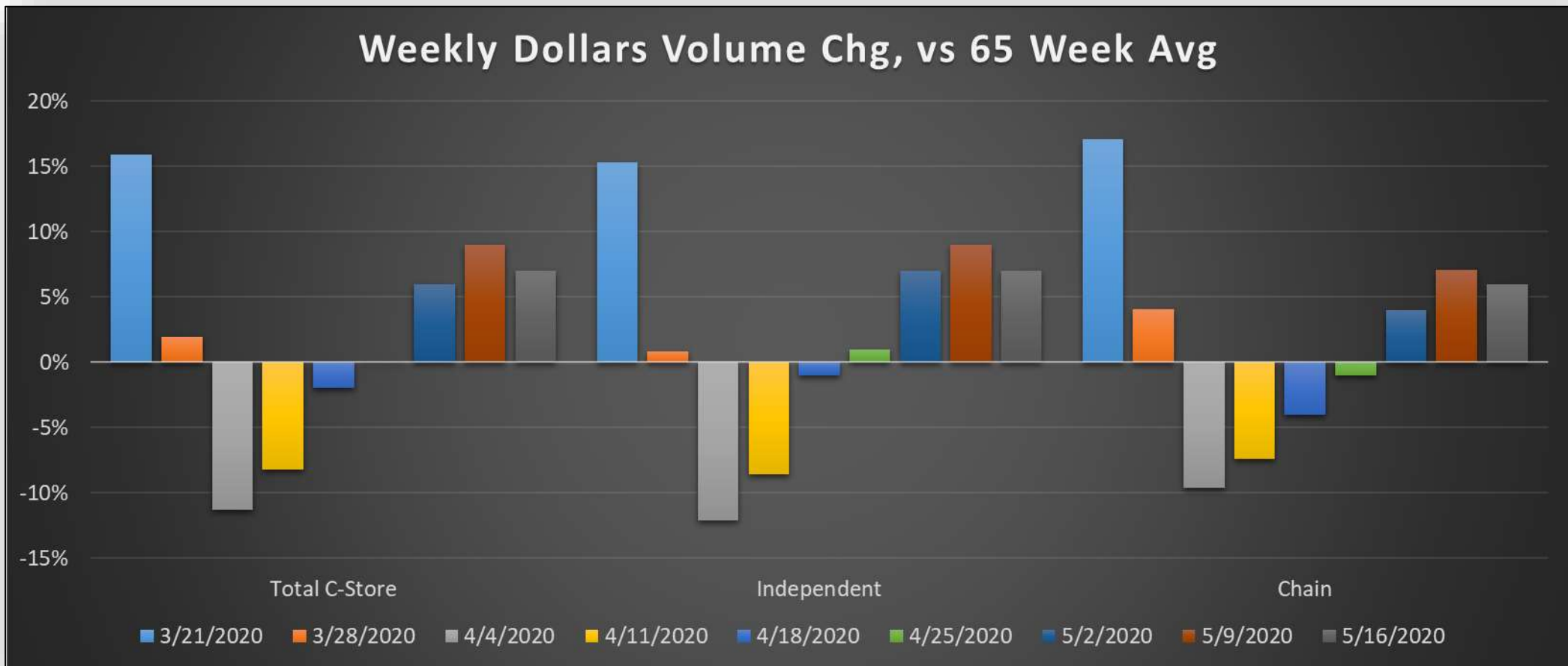
Average Dollars per store per week for 65 weeks ending 2/29/20 is \$6,080

Category	3 weeks ending 3/21/20	Week ending 3/28/20	Week ending 4/4/20	4/11/20	4/18/20	4/25/20	5/2/20	5/9/20	5/16/20
Total C-Store	Down 5%	Down 3.9%	Down 4.1%	Down 3.9%	Down 3.2%	Down 2.8%	Down 1.3%	Down .5%	Up .6%

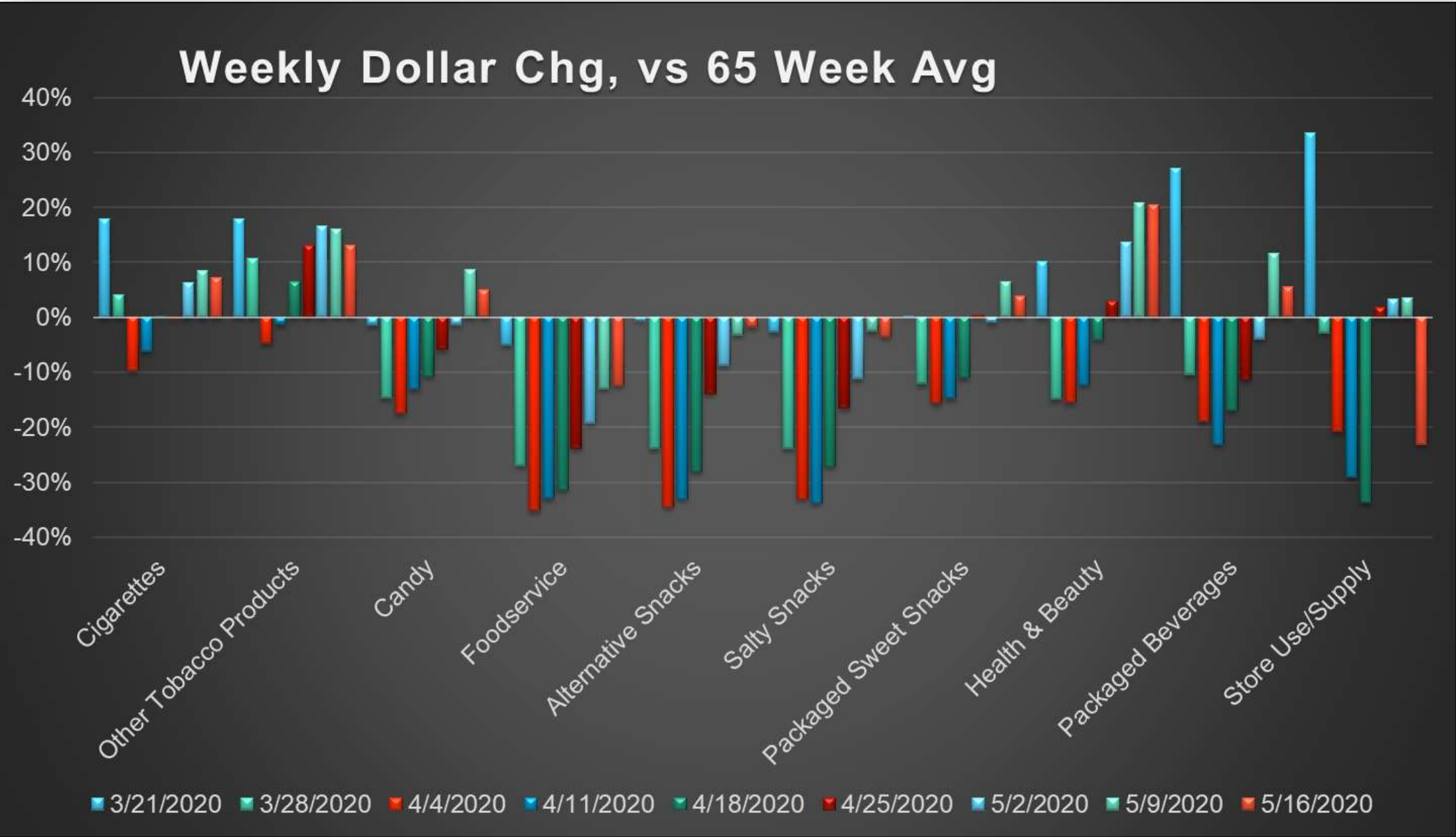


# Chain versus Independent – Dollar Performance

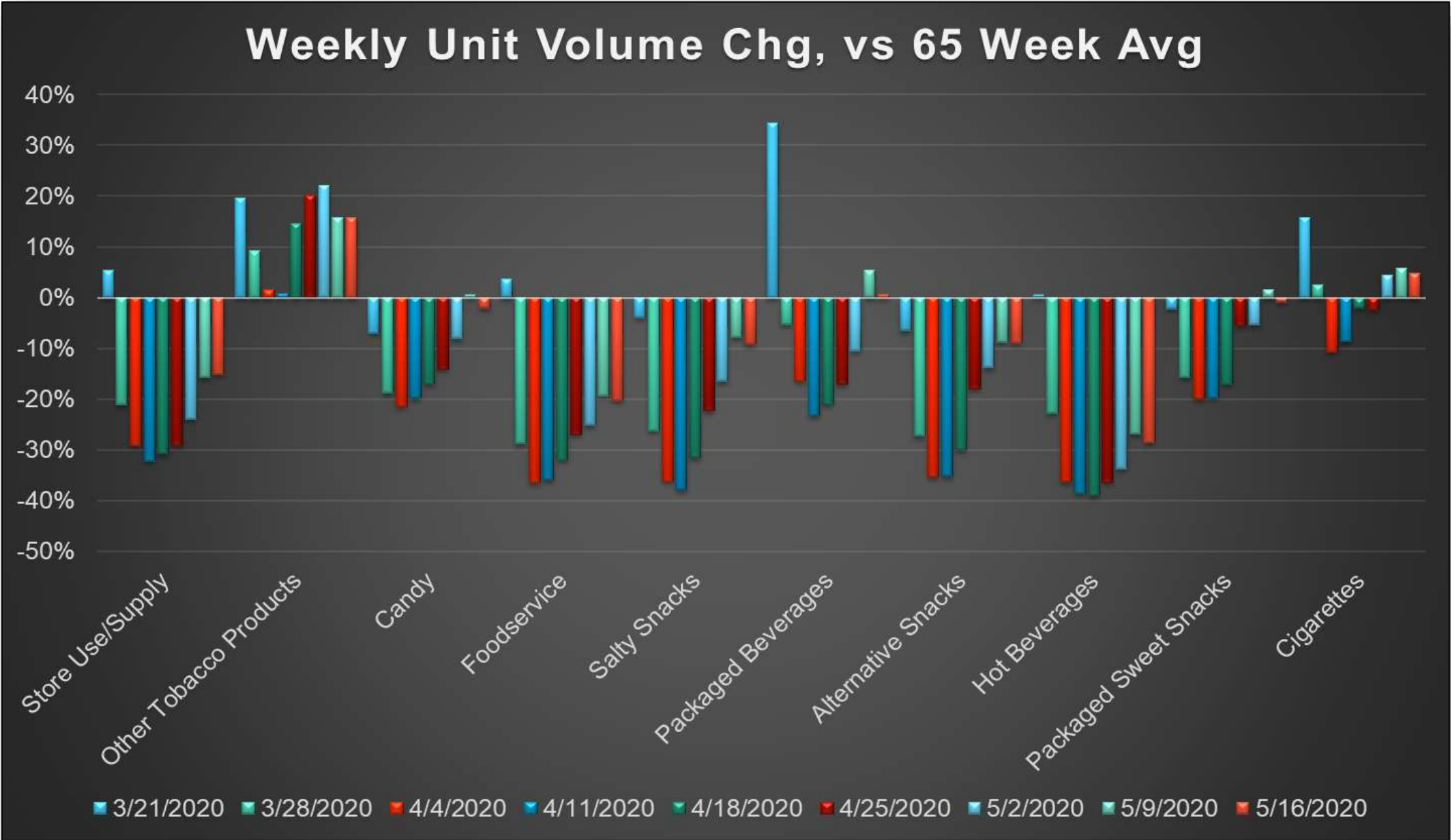
Type	3 weeks ending 3/21/20	Week ending 3/28/20	Week ending 4/4/20	4/11/20	4/18/20	4/25/20	5/2/20	5/9/20	5/16/20
CHAIN	Up 6.7%	Up 4%	Down 9.7%	Down 7.4%	Down 3.6%	Down 1.1%	Up 4.2	Up 7.1%	Up 5.7%
INDEPENDENTS	Up 4.8%	Up 0.8%	Down 12.3%	Down 8.6%	Down 1.1%	Up .7%	Up 6.6%	Up 9.4%	Up 7.2%



# Category Performance – Dollars

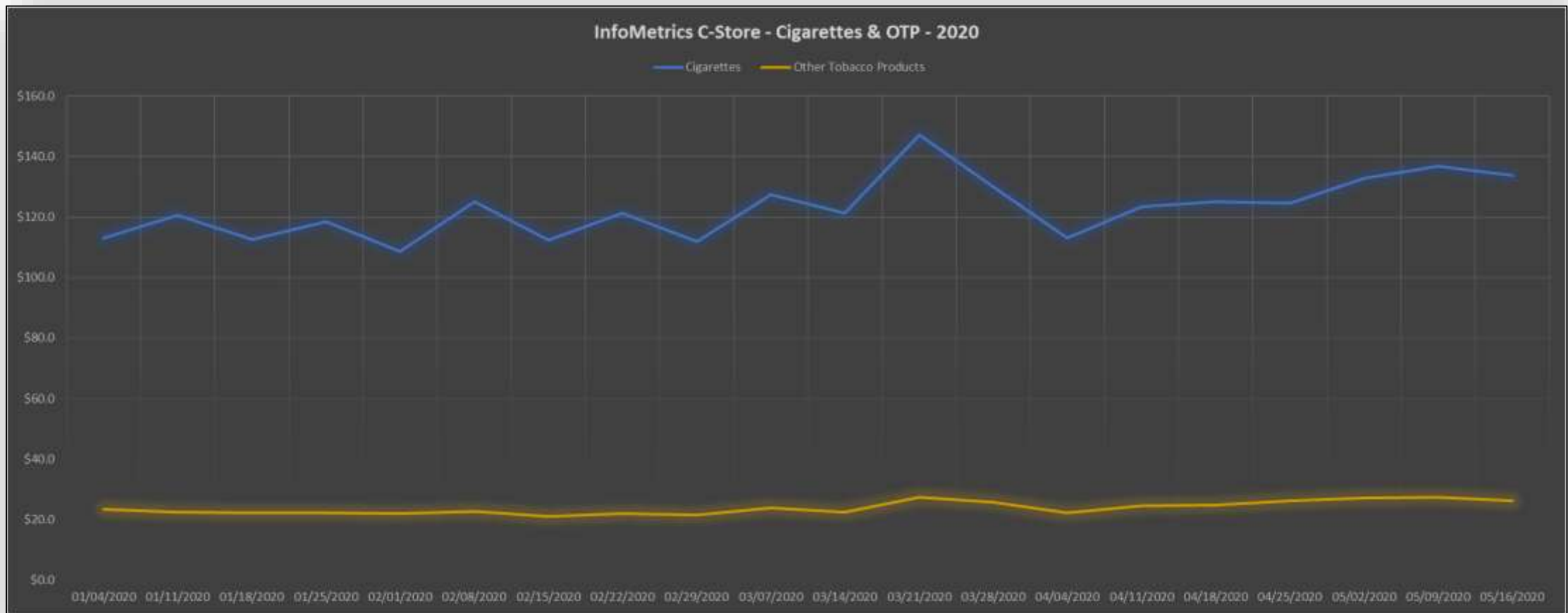


# Category Performance – Units

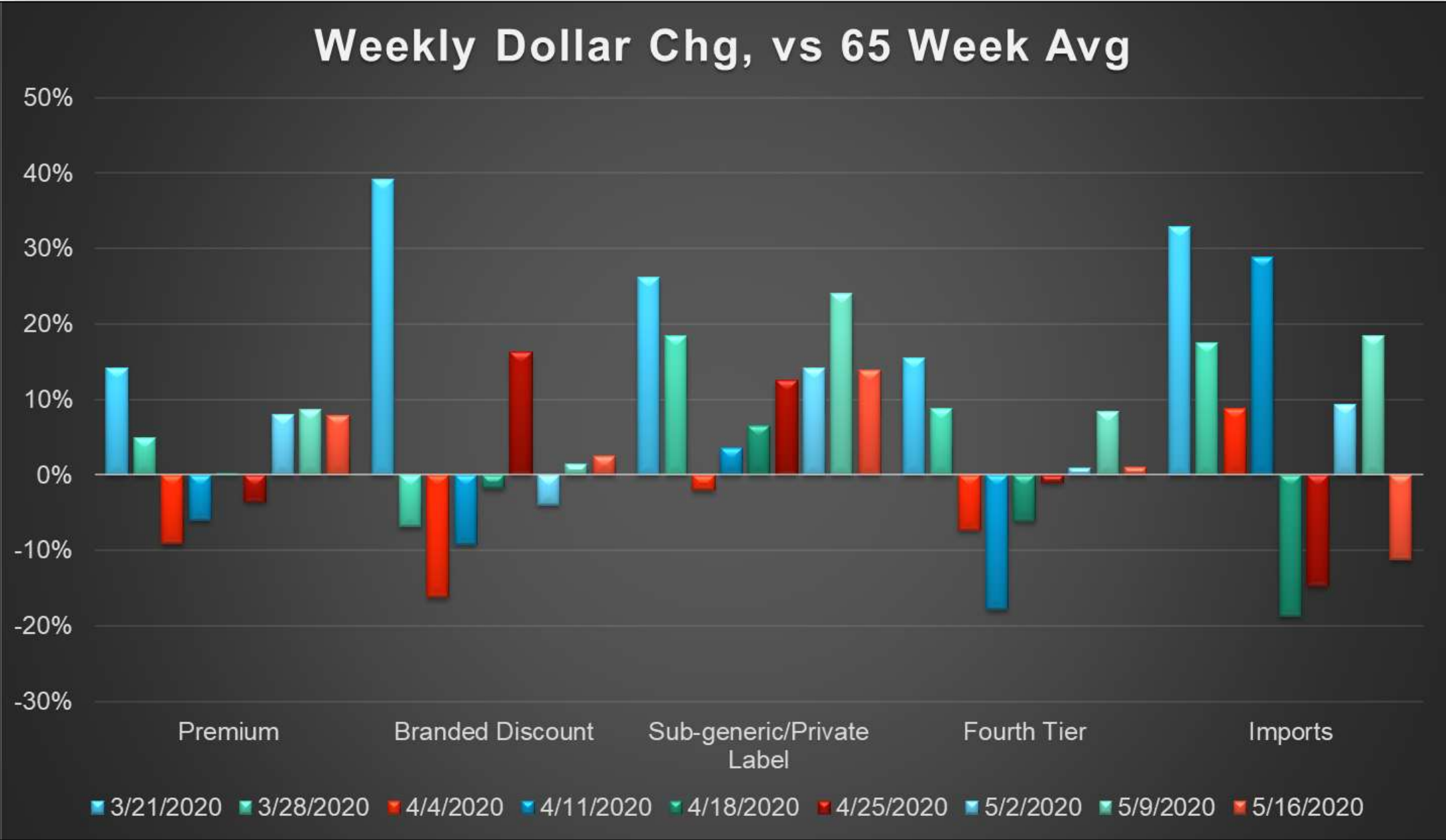


# Category Performance – Cigarettes & OTP - Dollars

Category	3 weeks ending 3/21/20	Week ending 3/28/20	Week ending 4/4/20	4/11/20	4/18/20	4/25/20	5/2/20	5/9/20	5/16/20
Cigarettes	Up 6%	Up 4%	Down 10%	Down 6%	Even	Even	Up 6%	Up 8%	Up 7%
OTP	Up 6%	Up 11%	Down 5%	Down 1%	Up 7%	Up 14%	Up 17%	Up 16%	Up 13%

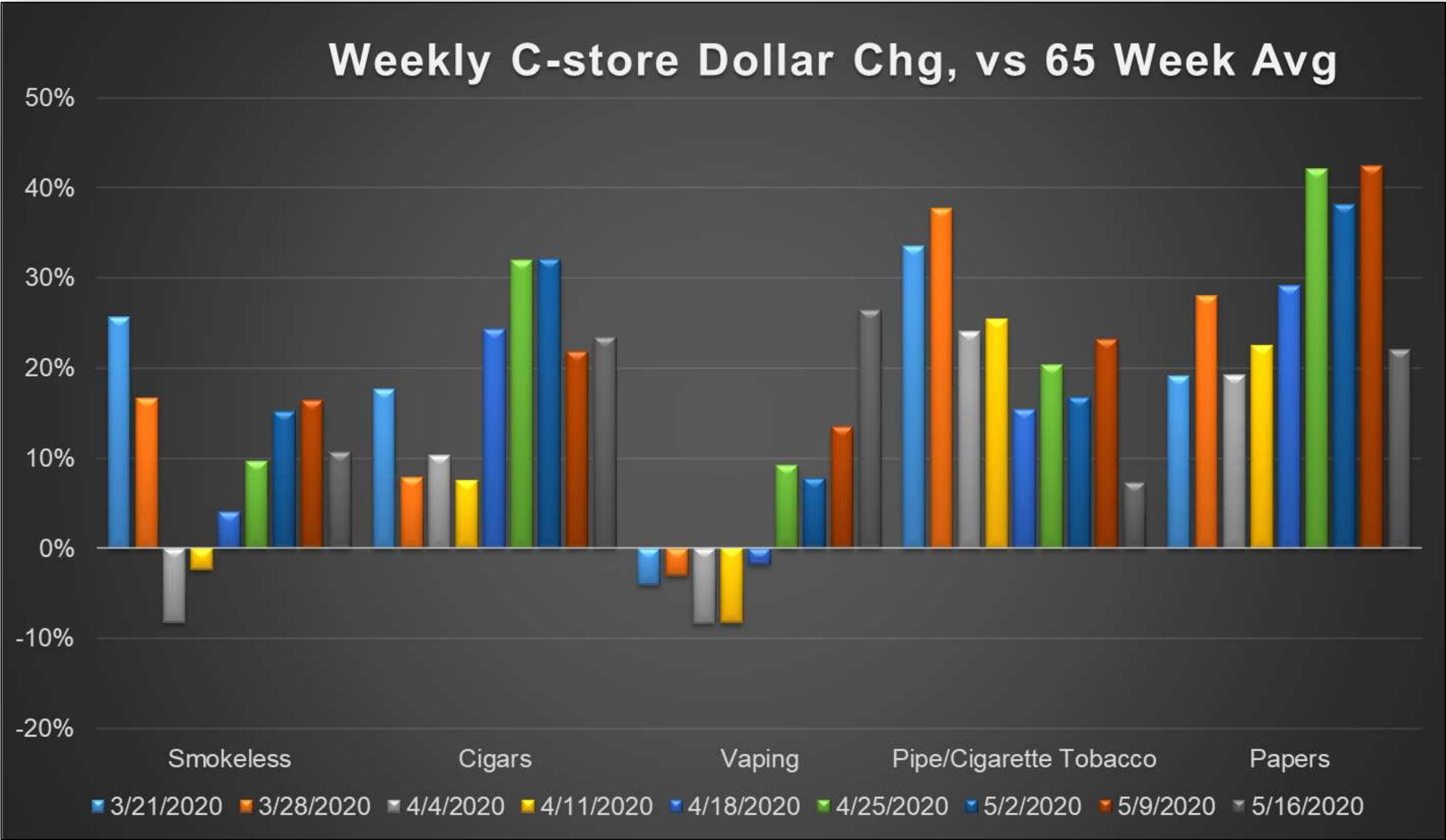


# Sub Category Performance – Cigarettes- Dollars



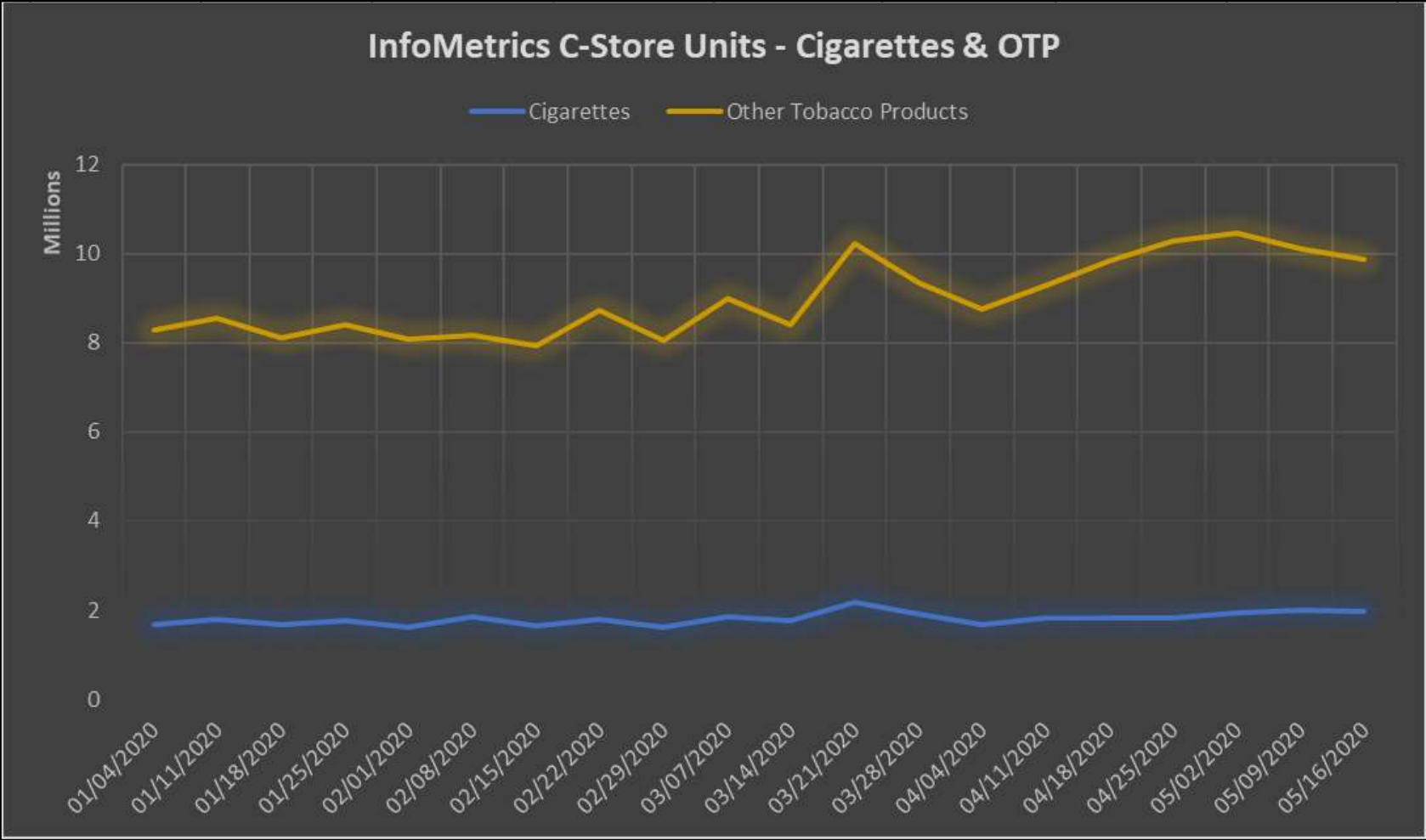


# Sub Category Performance – Other Tobacco Products - Dollars

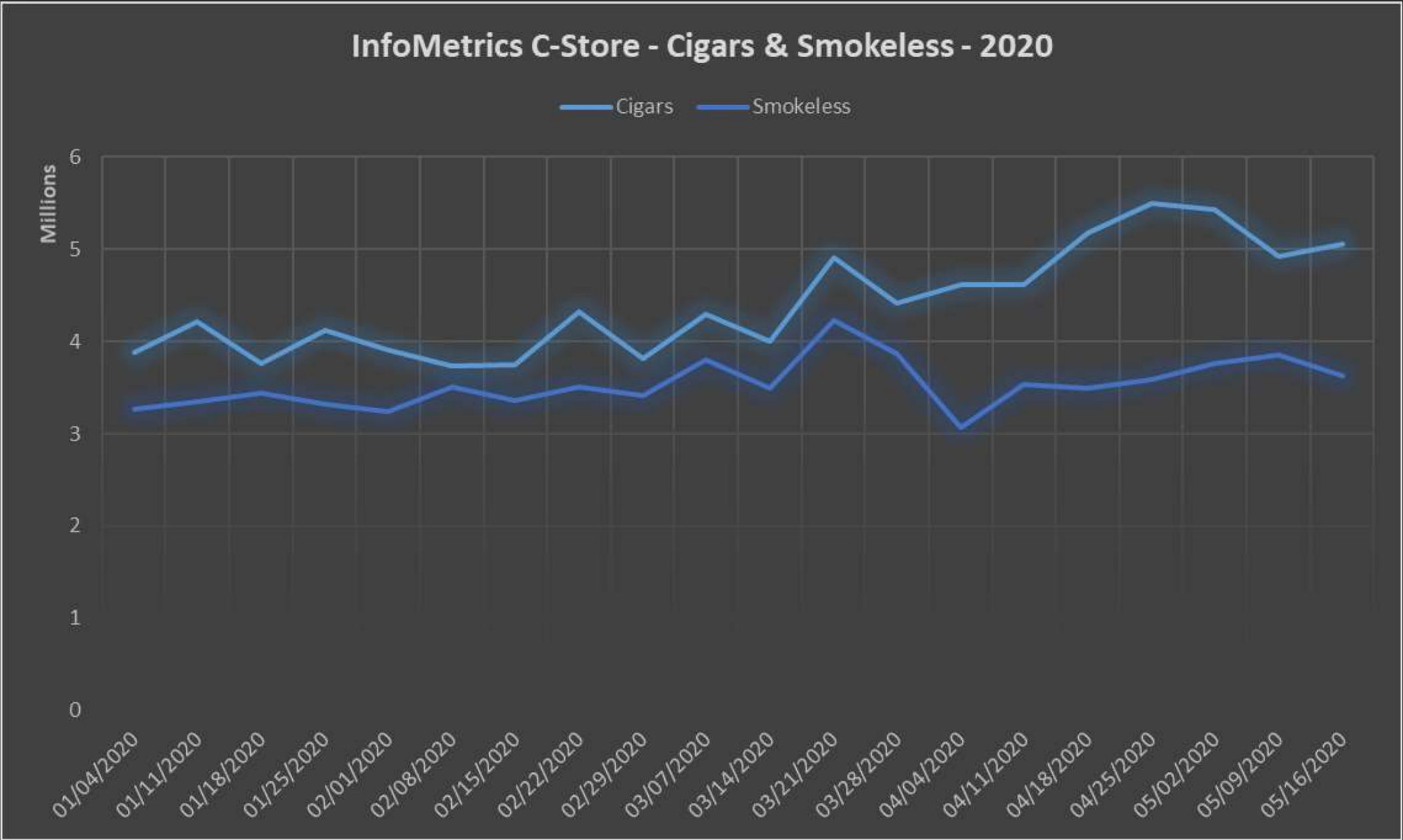


Category Performance – Cigarettes & OTP - Units

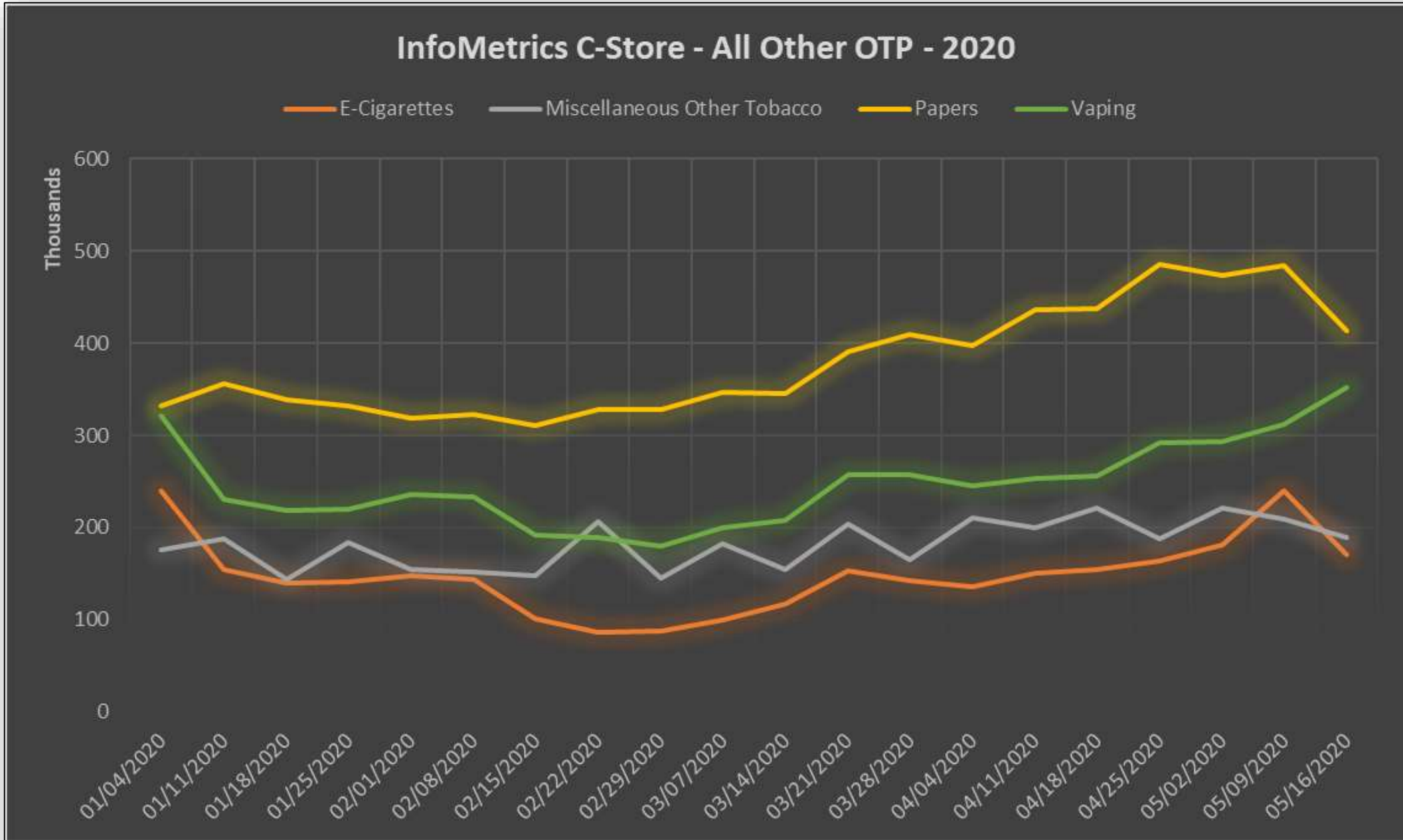
Category	3 weeks ending 3/21/20	Week ending 3/28/20	Week ending 4/4/20	4/11/20	4/18/20	4/25/20	5/2/20	5/9/20	5/16/20
Cigarettes	Up 3%	Up 3%	Down 11%	Down 9%	Down 2%	Down 2%	Up 4%	Up 6%	Up 5%
OTP	Up 8%	Up 9%	Up 2%	Up 1%	Up 15%	Up 20%	Up 22%	Up 16%	Up 16%



# Sub Category Performance – OTP - Units

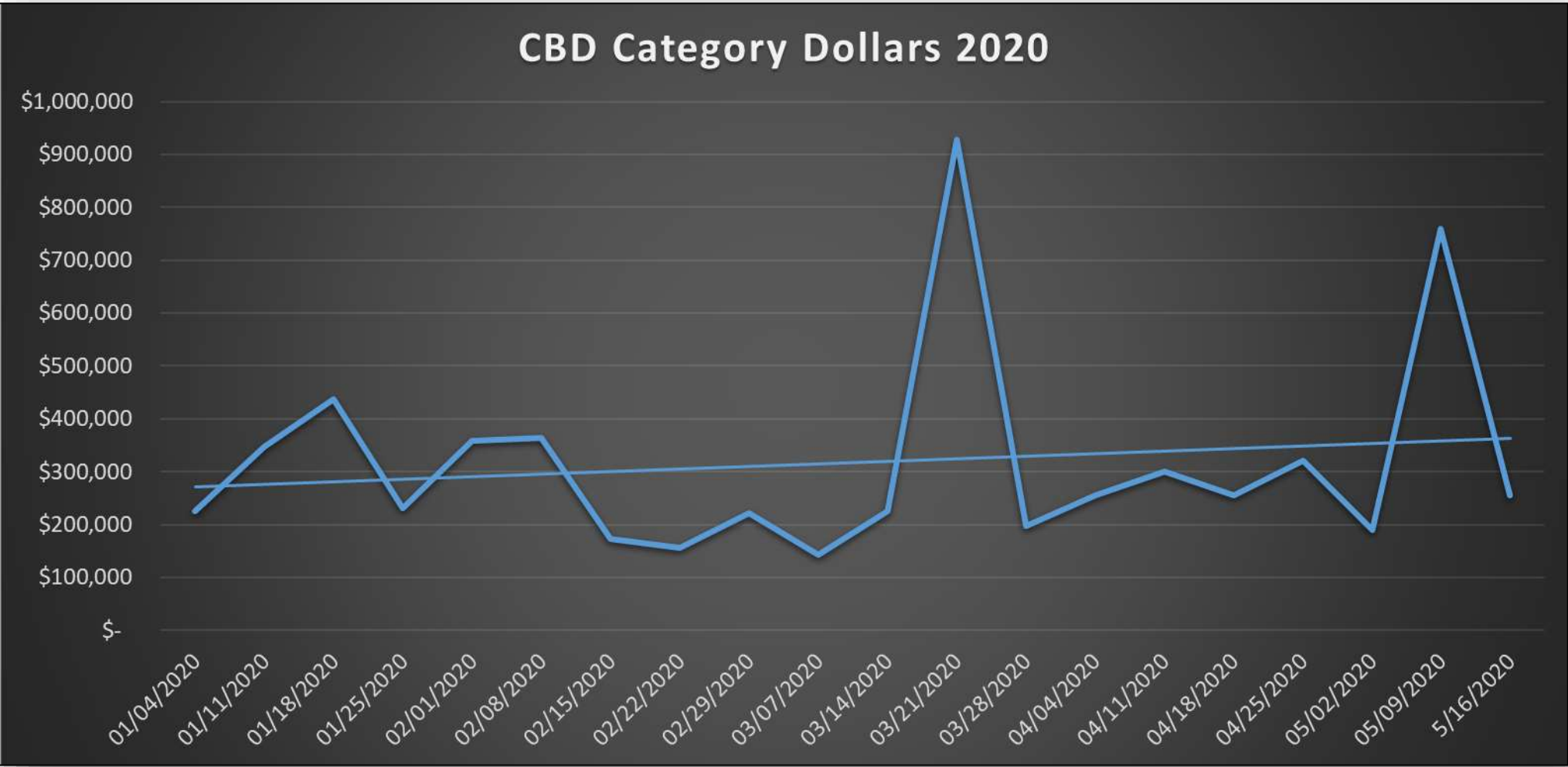


## Sub Category Performance – Other OTP - Units



# Category Performance – CBD - Dollars

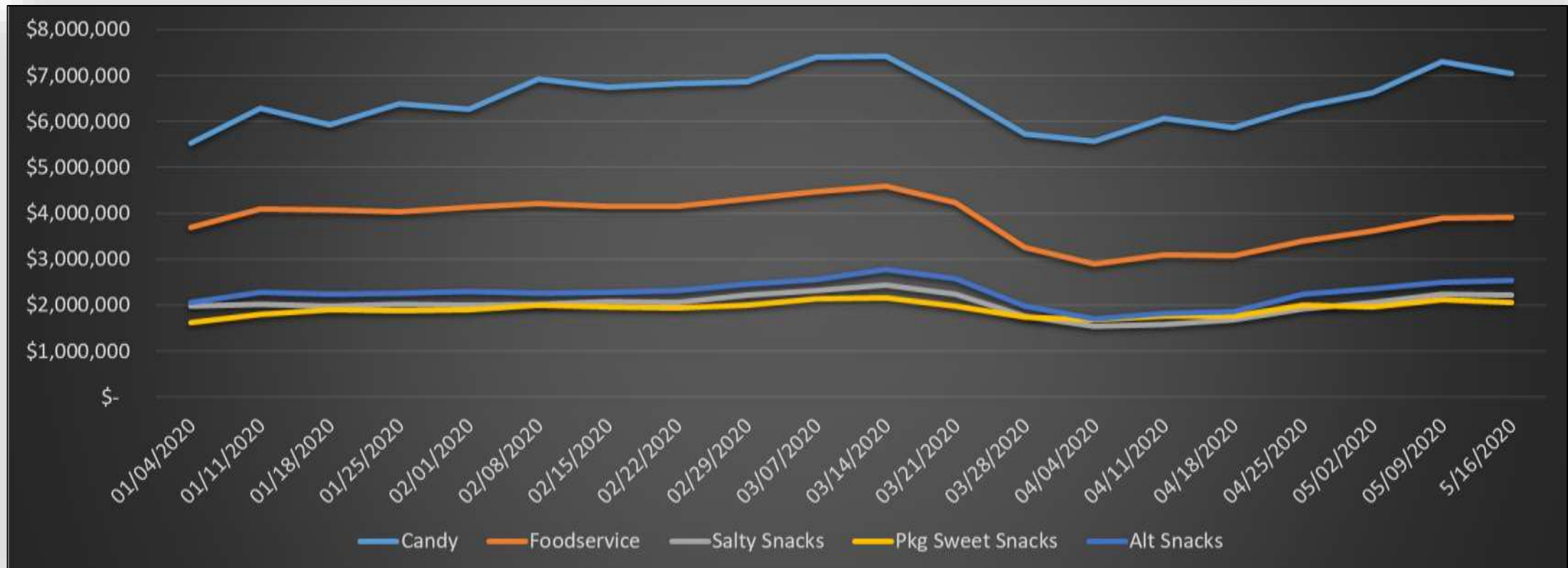
Category	3 weeks ending 3/21/20	Week ending 3/28/20	Week ending 4/4/20	4/11/20	4/18/20	4/25/20	5/2/20	5/9/20	5/16/20
CBD	Up 25.7%	Down 45.2%	Down 38.7%	Down 23%	Down 34%	Down 17%	Down 51%	Up 96%	Down 34.2





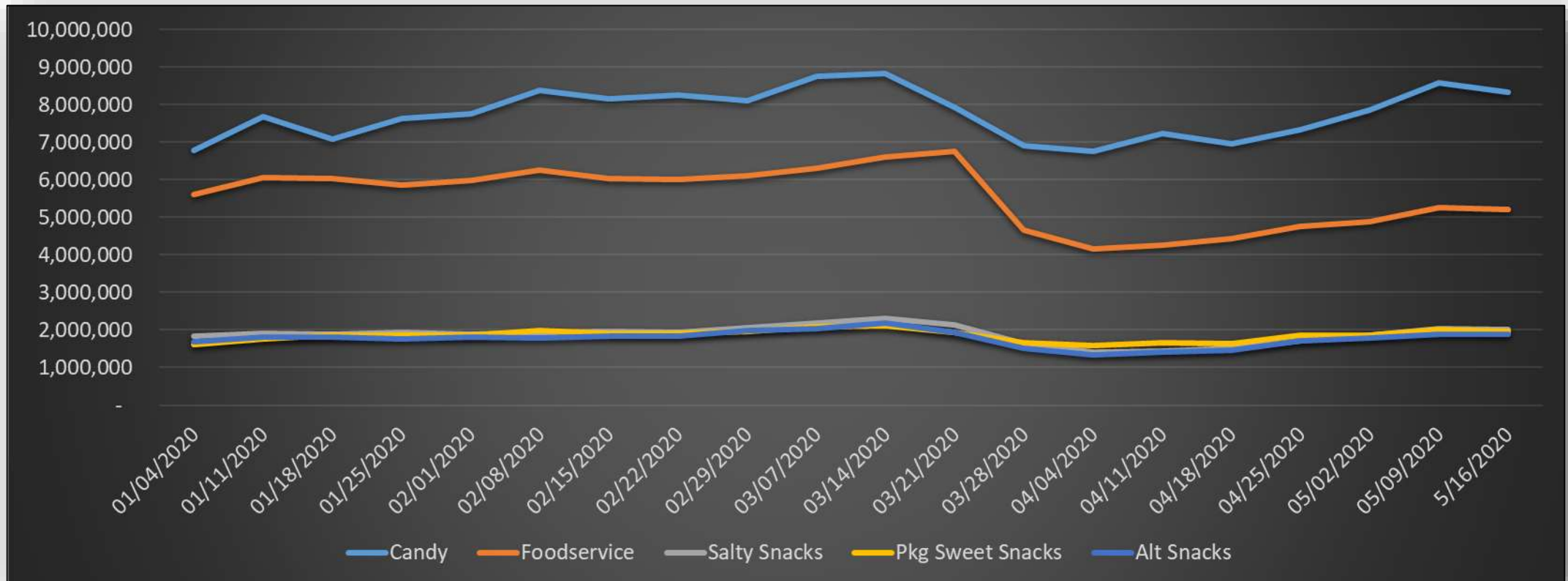
# Category Performance – Non-Tobacco Top Categories - Dollars

Category	3 weeks ending 3/21/20	Week ending 3/28/20	Week ending 4/4/20	4/11/20	4/18/20	4/25/20	5/2/20	5/9/20	5/16/20
Candy	Up 6.3%	Down 14.7%	Down 17.6%	Down-13%	Down 11%	Down 6%	Down 1%	Up 9%	Up 5%
Foodservice	Down 0.7%	Down 27%	Down 35.2%	Down 33%	Down 31%	Down 24%	Down 19%	Down 13%	Down 12.4%
Salty Snacks	Up 0.9%	Down 23.9%	Down 33.2%	Down 34%	Down 27%	Down 17%	Down 11%	Down 3%	Down 3.6%
Pkg Sweet Snacks	Up 5.4%	Down 12.2%	Down 15.7%	Down 15%	Down 11%	EVEN	Down 1%	Up 6%	Up 3.9%
Alternative Snacks	Up 1.9%	Down 24%	Down 34.6%	Down 33%	Down 28%	Down 14%	Down 9%	Down 3%	Down 1.9%



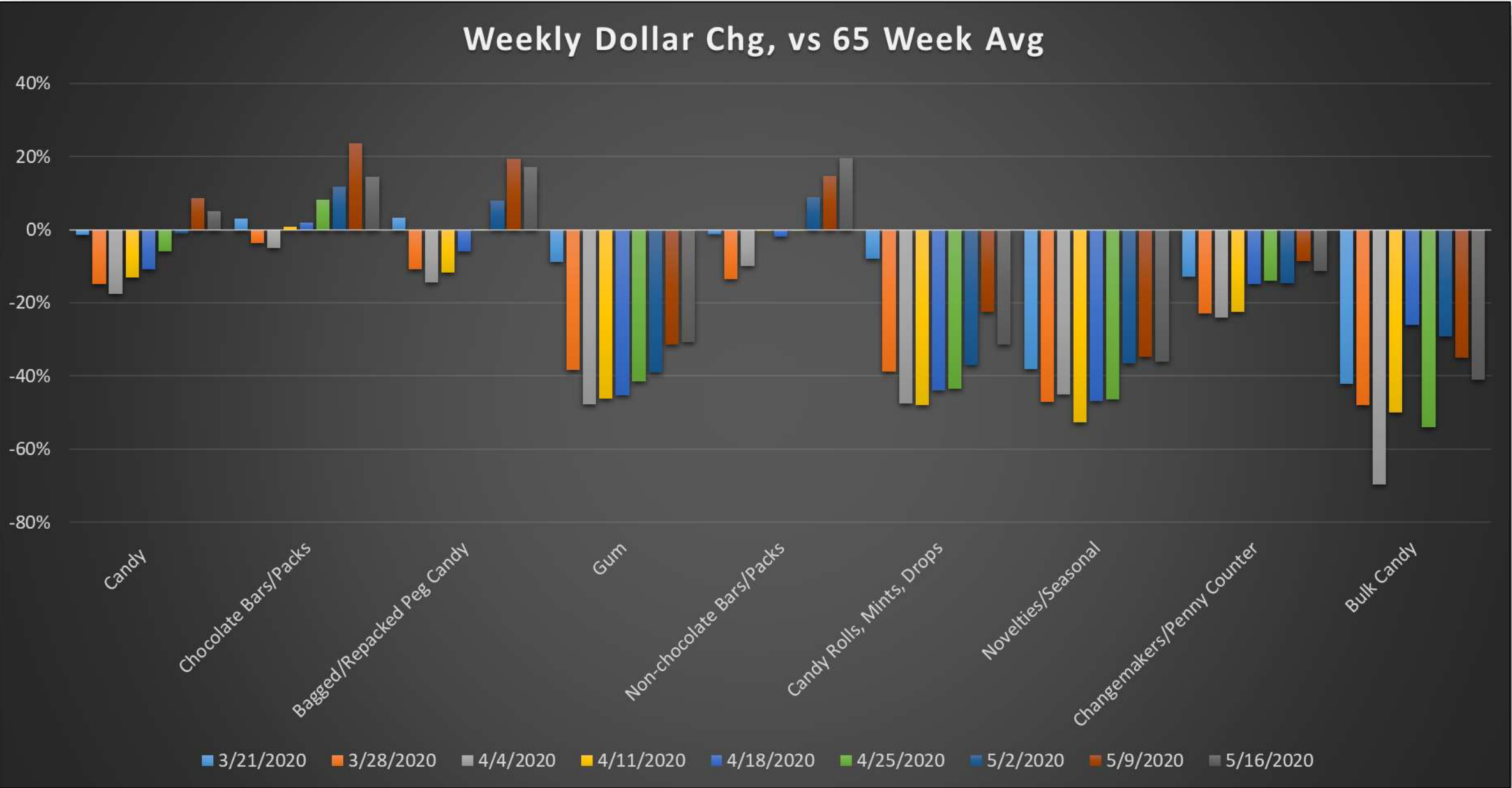
# Category Performance – Non-Tobacco Top Categories - Units

Category	3 weeks ending 3/21/20	Week ending 3/28/20	Week ending 4/4/20	4/11/20	4/18/20	4/25/20	5/2/20	5/9/20	5/16/20
Candy	Down 0.3%	Down 18.9%	Down 21.6%	Down 20%	Down 17%	Down 14%	Down 8%	Up 1%	Down -2.1%
Foodservice	Up 0.6%	Down 28.8%	Down 36.5%	Down 36%	Down 32%	Down 27%	Down 25%	Down 19%	Down -20.3%
Salty Snacks	Down 0.6%	Down 26.2%	Down 36.3%	Down 38%	Down 31%	Down 22%	Down 16%	Down 8%	Down -9.2%
Pkg Sweet Snacks	Up 3.4%	Down 15.8%	Down 20%	Down 23%	Down 21%	Down 17%	Down 11%	Up 5%	Down .9%
Alternative Snacks	Down 0.9%	Down 27.2%	Down 35.4%	Down 35%	Down 30%	Down 18%	Down 14%	Down 9%	Down 8.9%

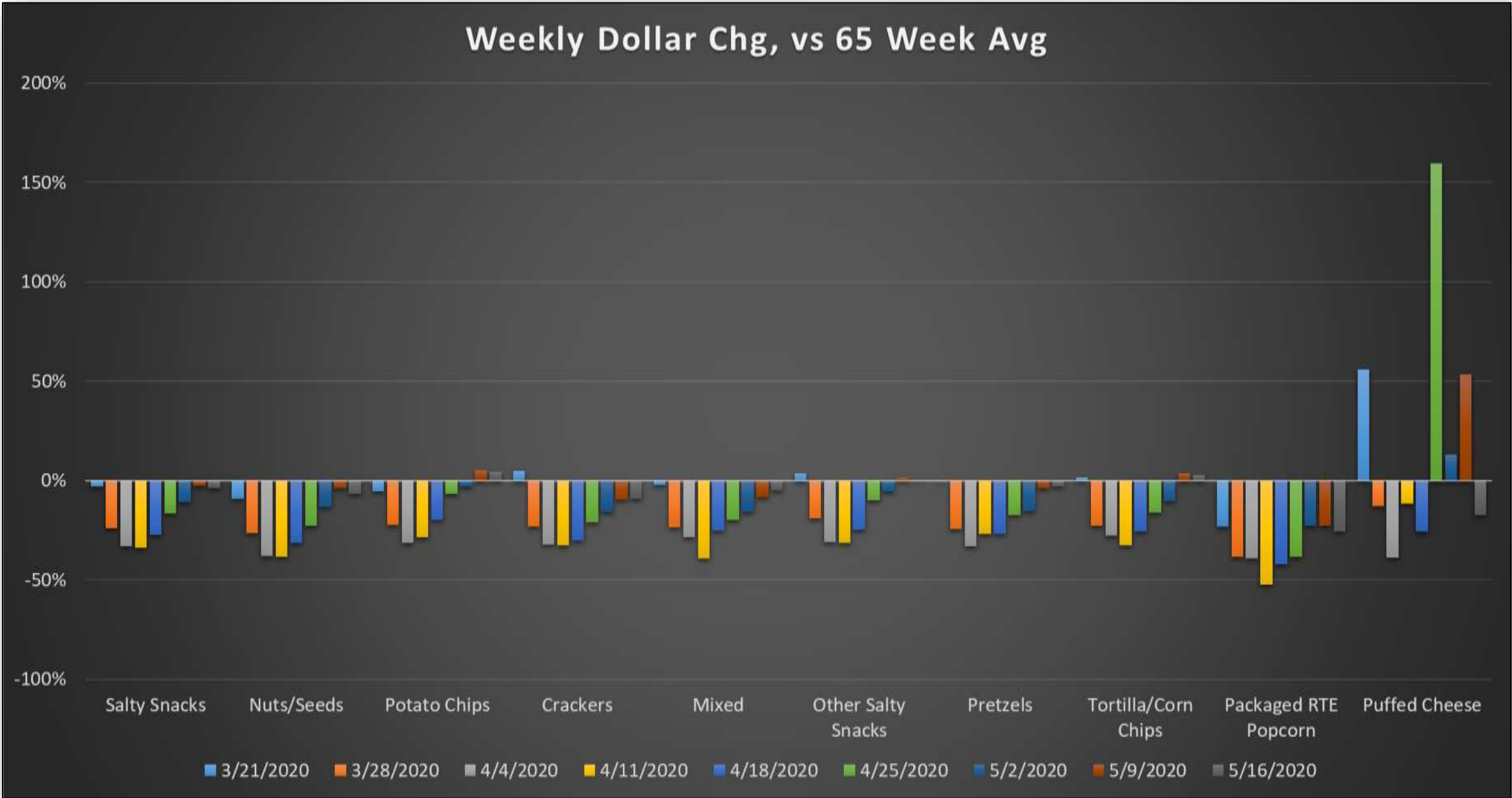




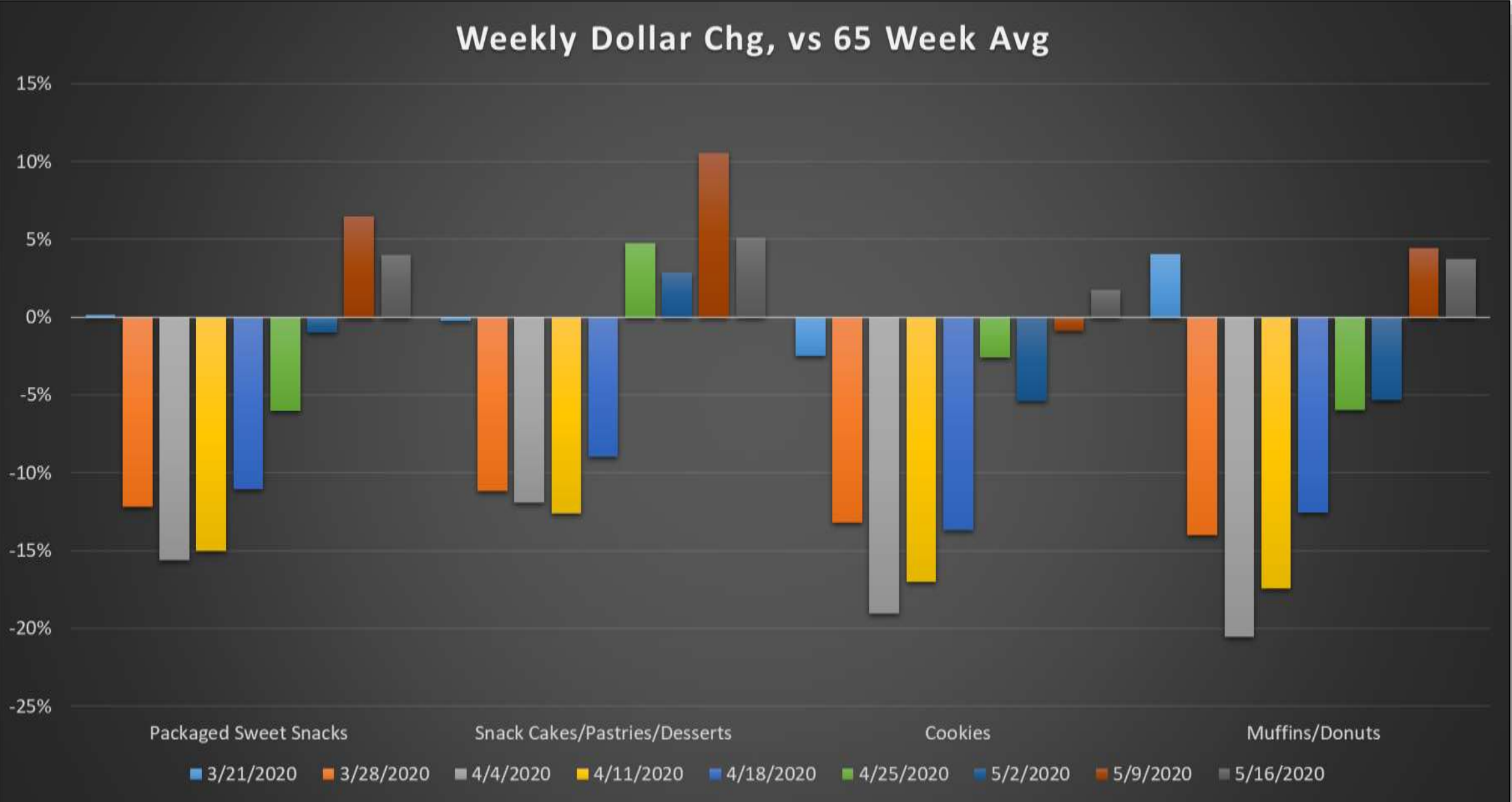
# Sub Category Performance – Candy - Dollars



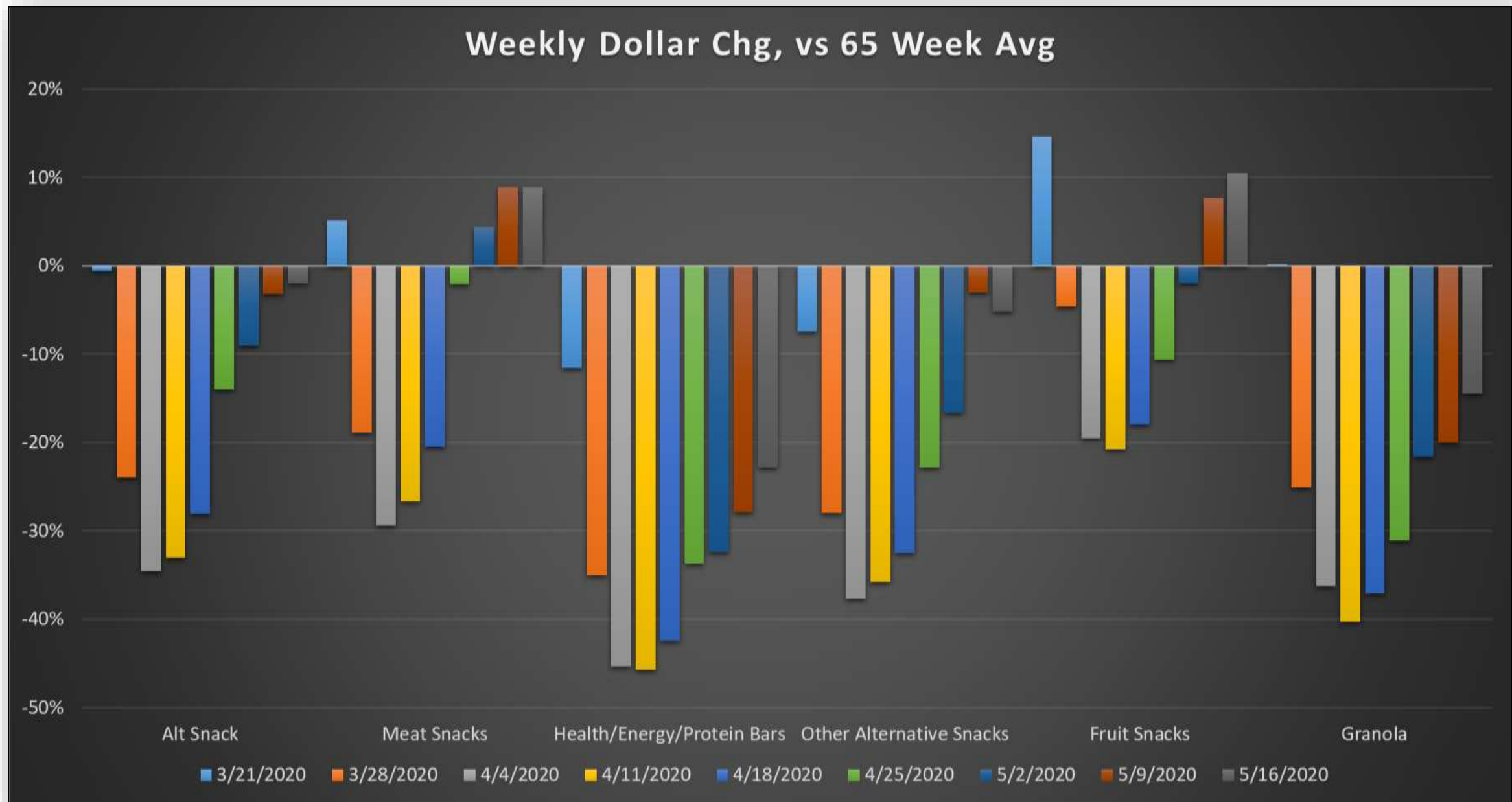
# Sub Category Performance – Salty Snacks - Dollars



# 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	4/11/20	4/18/20	4/25/20	5/2/20	5/9/20	5/16/20
Packaged Beverages	Up 15.7%	Down 10.5%	Down 19.1%	Down 23%	Down 17%	Down 11%	Down 4%	Up 12%	Up 5.6%
Health & Beauty	Up 3.1%	Down 14.9%	Down 15.4%	Down 12%	Down 4%	Up 3%	Up 14%	Up 21%	Up 20.5%
Edible Grocery	Up 18%	Up 48.8%	Up 11.6%	Up 17%	Up 16%	Up 18%	Up 9%	Up 20%	Up 12.4%
General Merchandise	Down 3.3%	Down 6.6%	Down 25.2%	Down 18%	Up 23%	Up 42%	Up 29%	Up 53%	Up 27.2%
Non-Edible Grocery	Up 40.4%	Up 42.9%	Up 5%	Down 3%	Up 16%	Up 6%	Up 8%	Up 4%	Up .2%

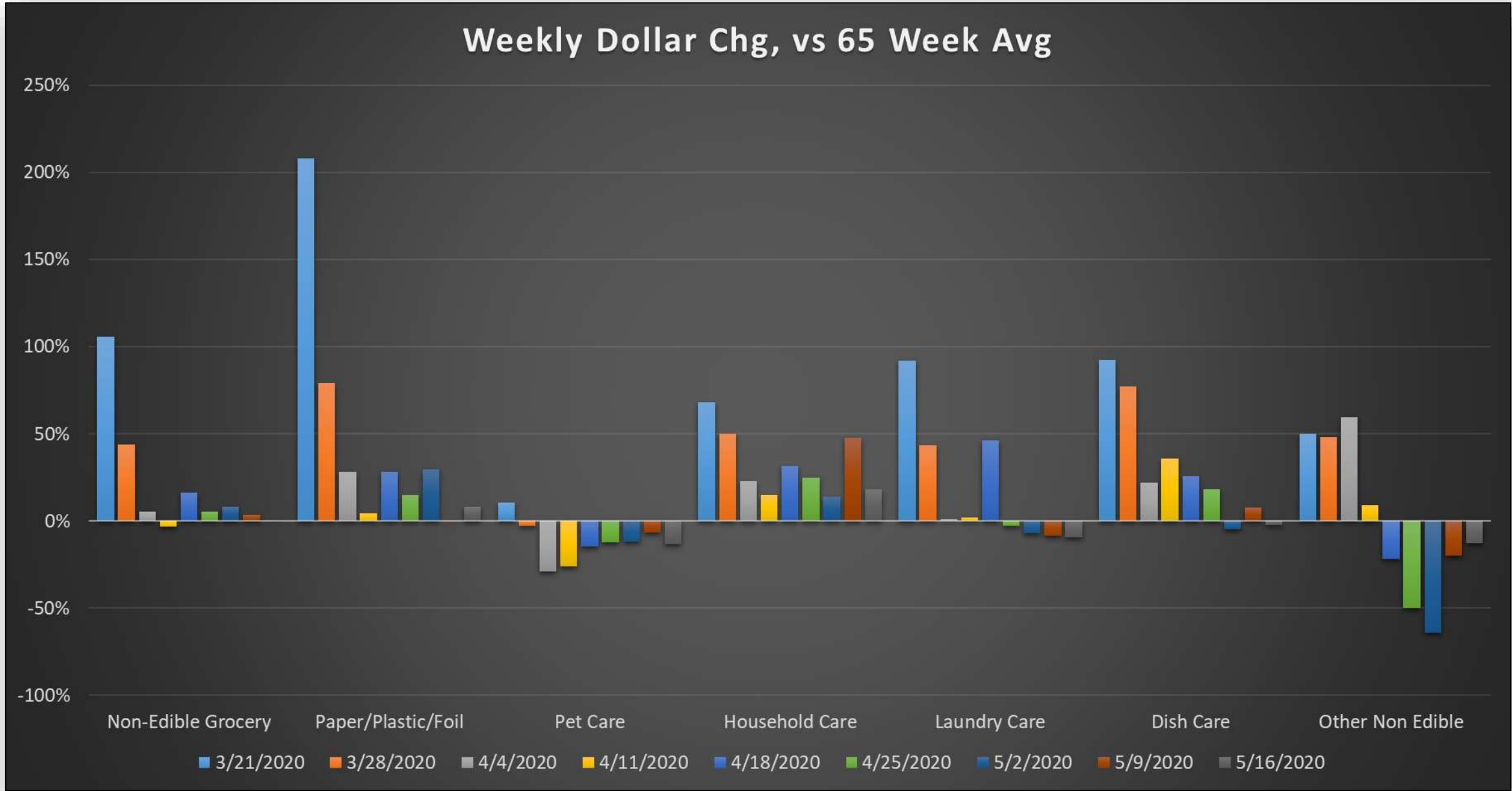


# Category Performance – Non-Tobacco - Units

Category	3 weeks ending 3/21/20	Week ending 3/28/20	Week ending 4/4/20	4/11/20	4/18/20	4/25/20	5/2/20	5/9/20	5/16/20
Packaged Beverages	Up 16.1%	Down 5.3%	Down 16.5%	Down 23%	Down 21%	Down 17%	Down 11%	Up 5%	Up .7%
Health & Beauty	Up 5.9%	Down 13.8%	Down 20.8%	Down 25.7%	Down 19.7%	Down 13.9%	Down 1.1%	Up 7.7%	Up 2.1%
Edible Grocery	Up 11.1%	Up 28.8%	Down 3.4%	Up .9%	Up .5%	Up 3.8%	Down 1.9%	Up 8.2%	Up 4%
General Merchandise	Up 3.9%	Up 7.8%	Down 13.8%	Down 14.8%	Up 1.1%	Up 9.7%	Up 9.5%	Up 25.2%	Up 3%
Non-Edible Grocery	Up 42%	Up 33.6%	Down 3.7%	Down 12.8%	Up 8.2%	Up 10%	Up 7.4%	Down 6.1%	Down -9.1%

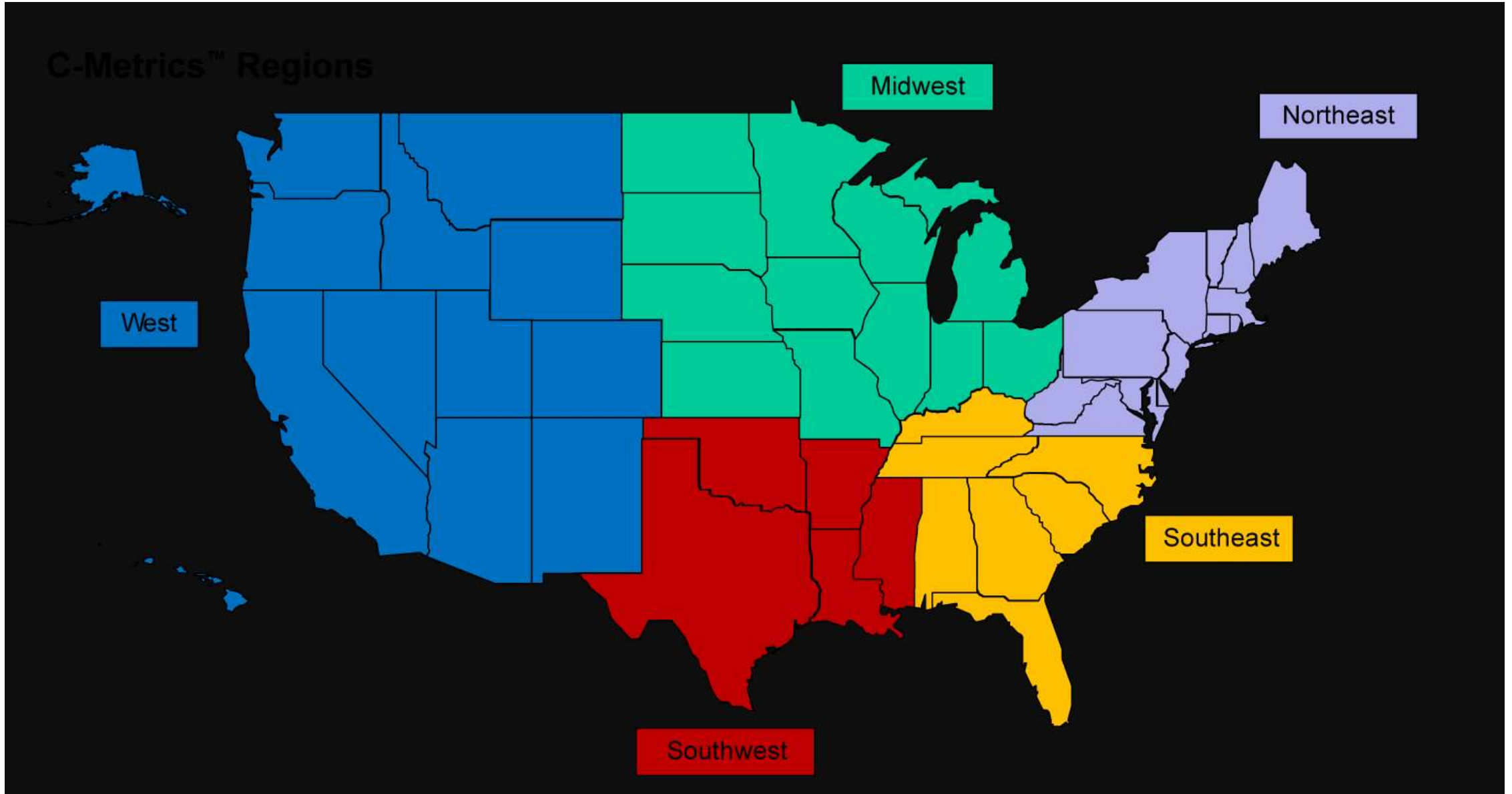


# Sub Category Performance – Non Edible Grocery

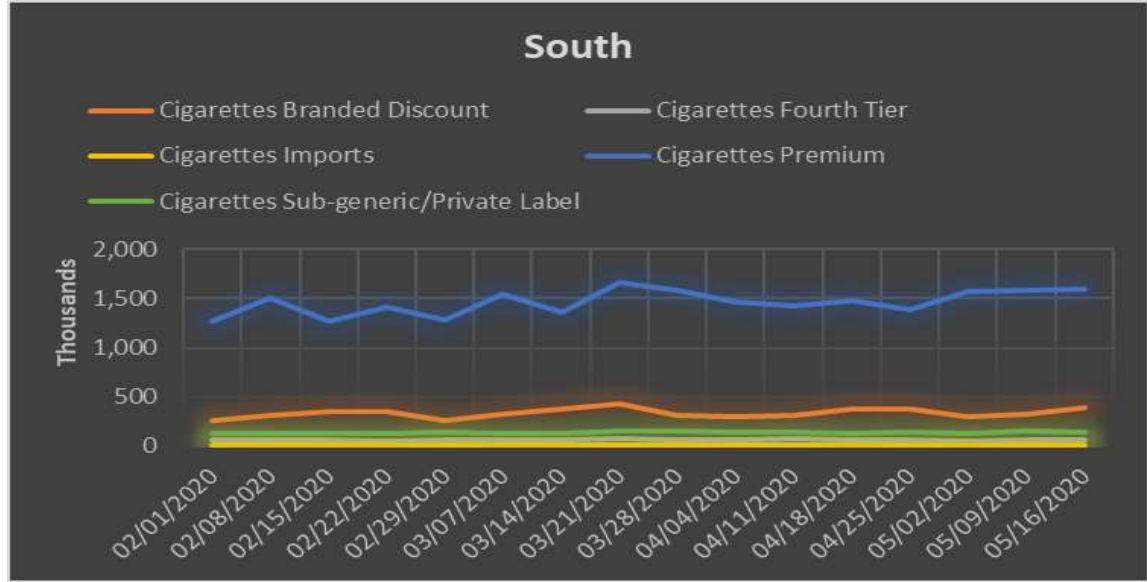
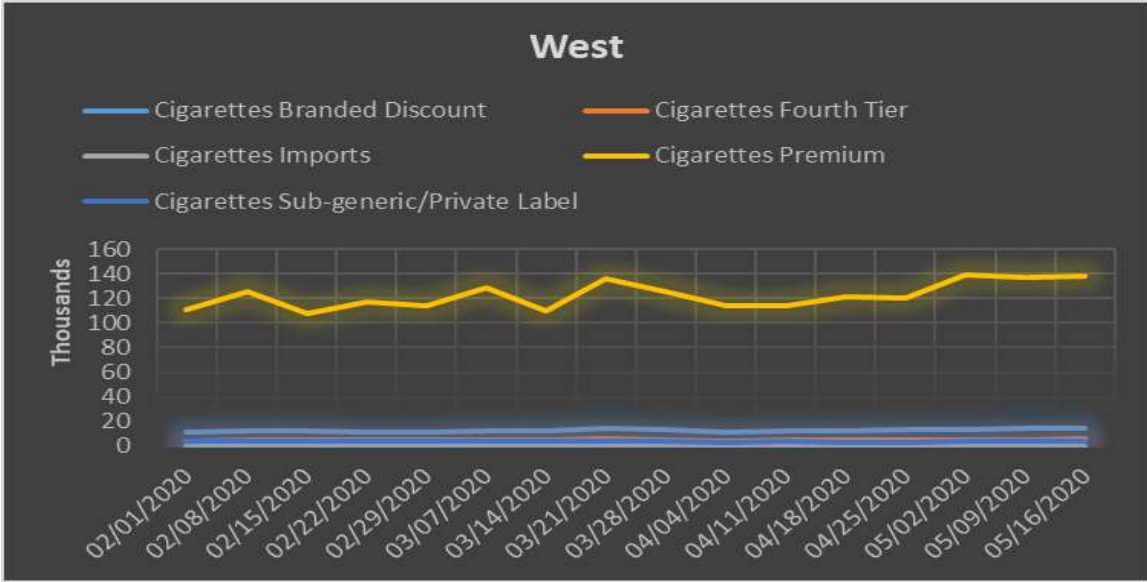
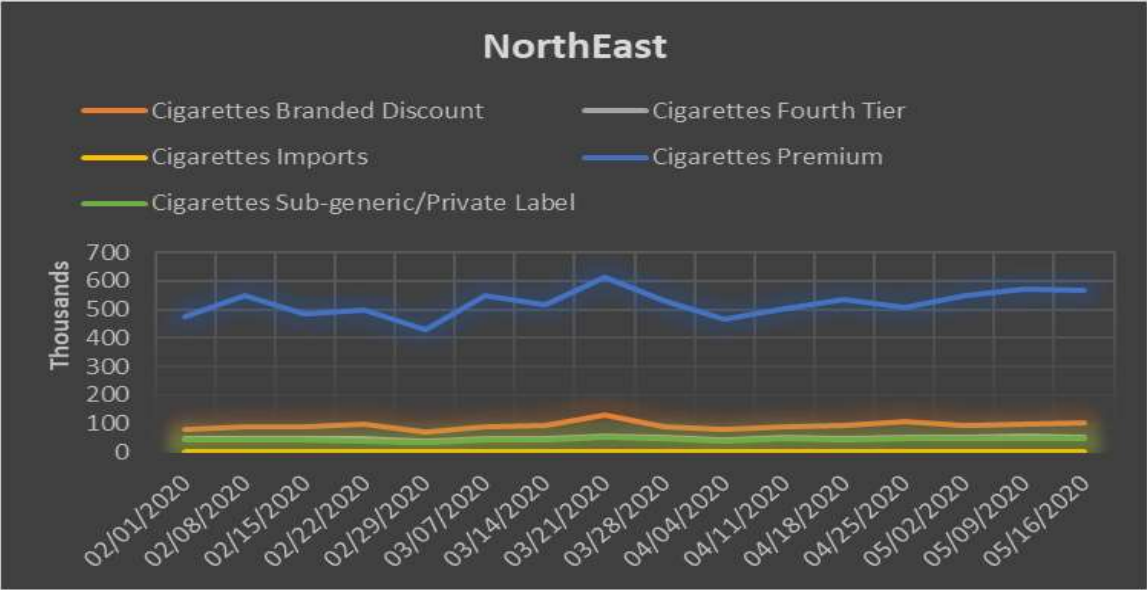
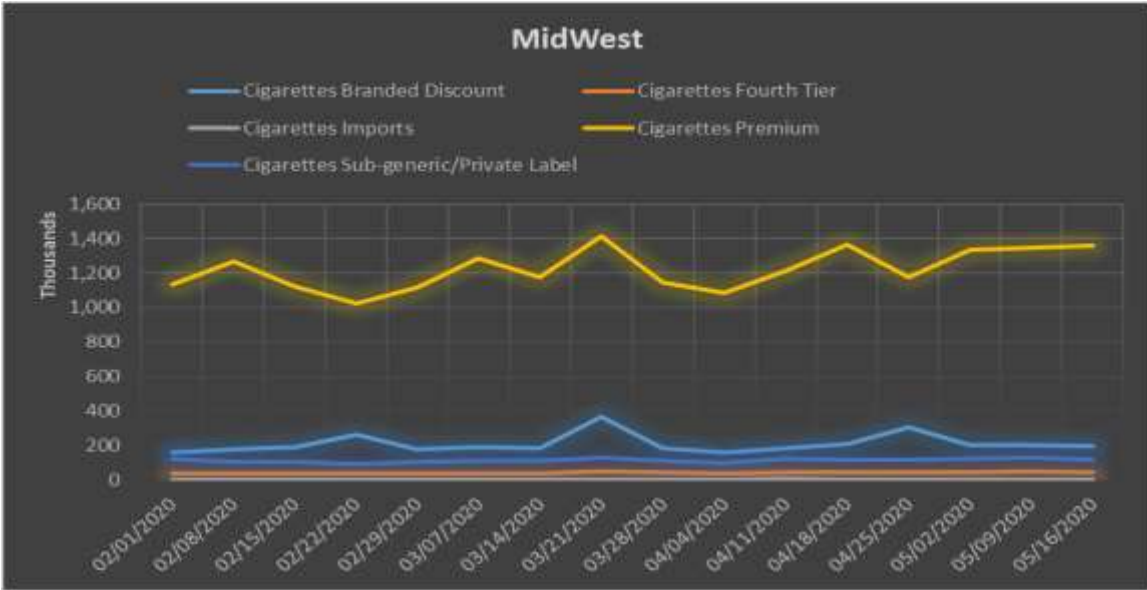




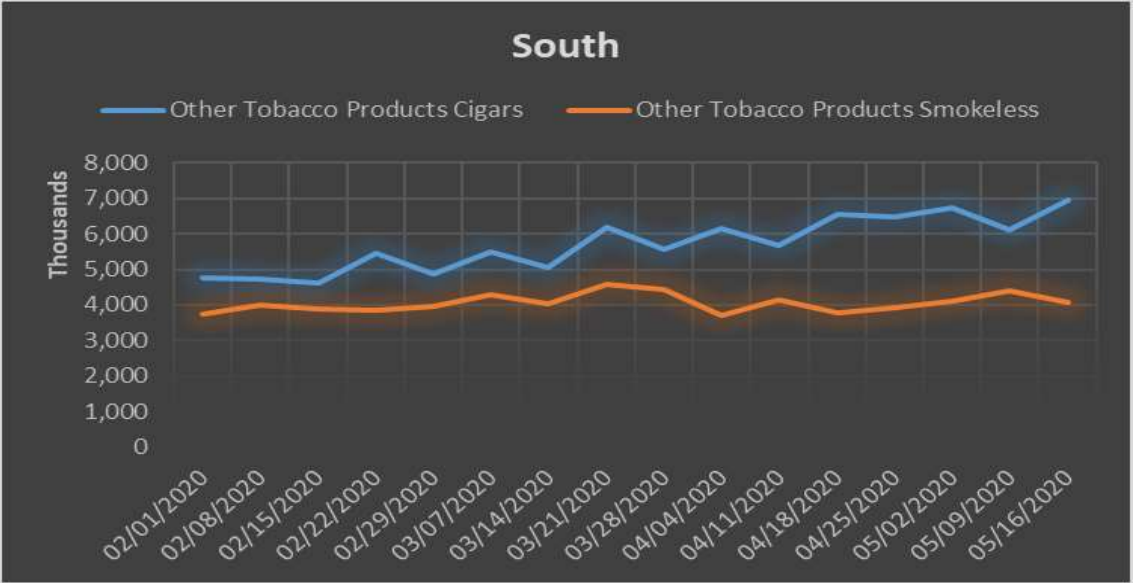
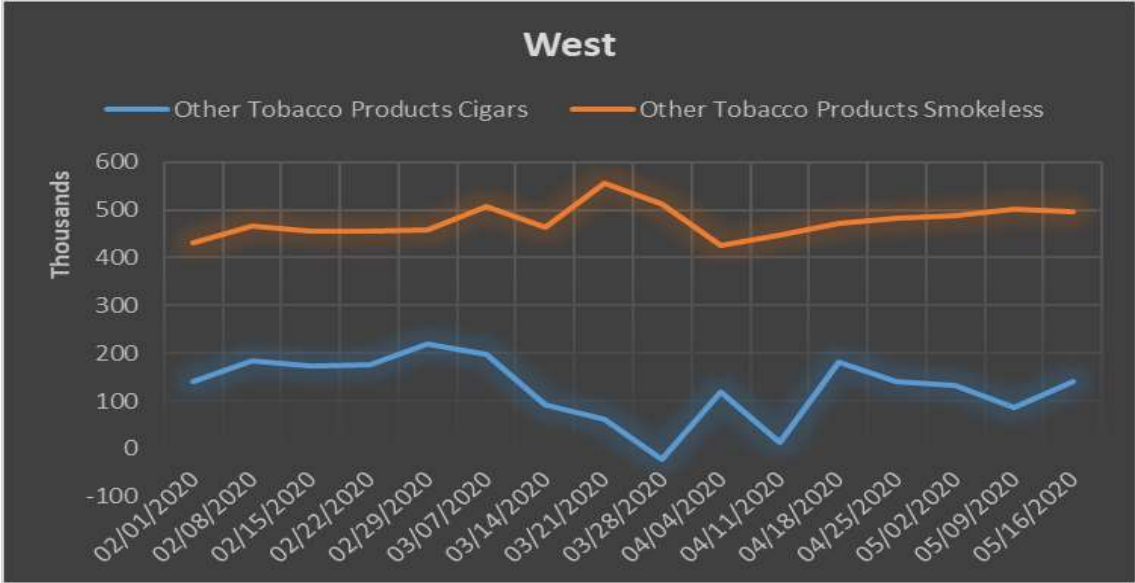
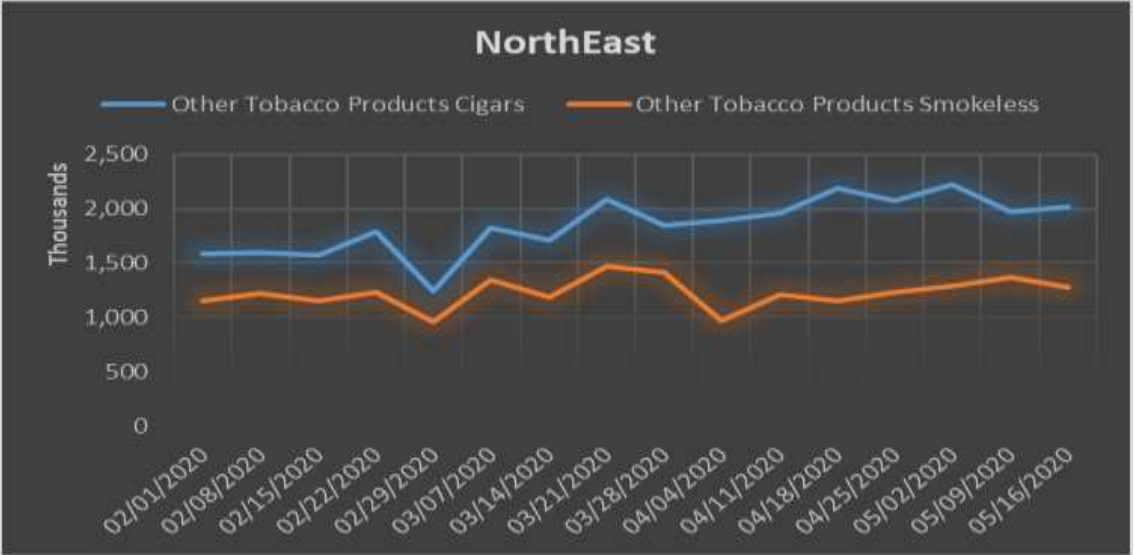
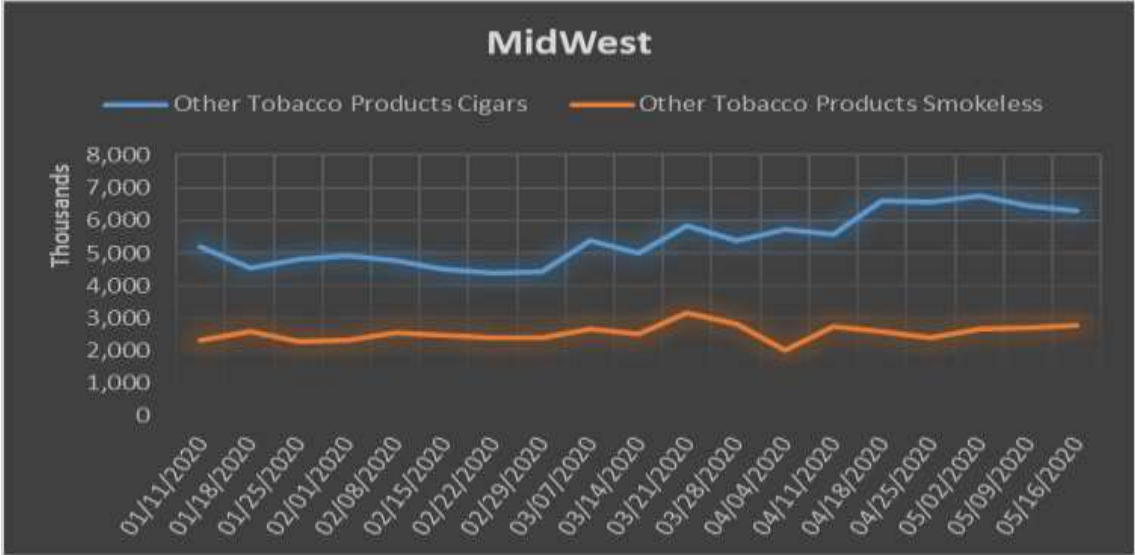
# Regional Performance



# Regional Performance - Cigarettes

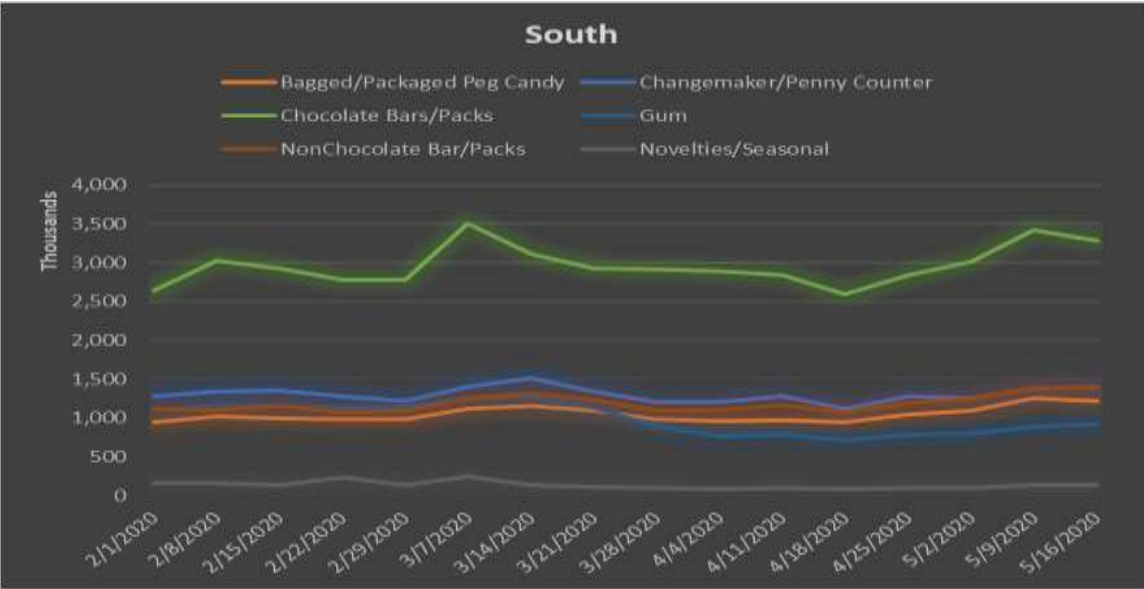
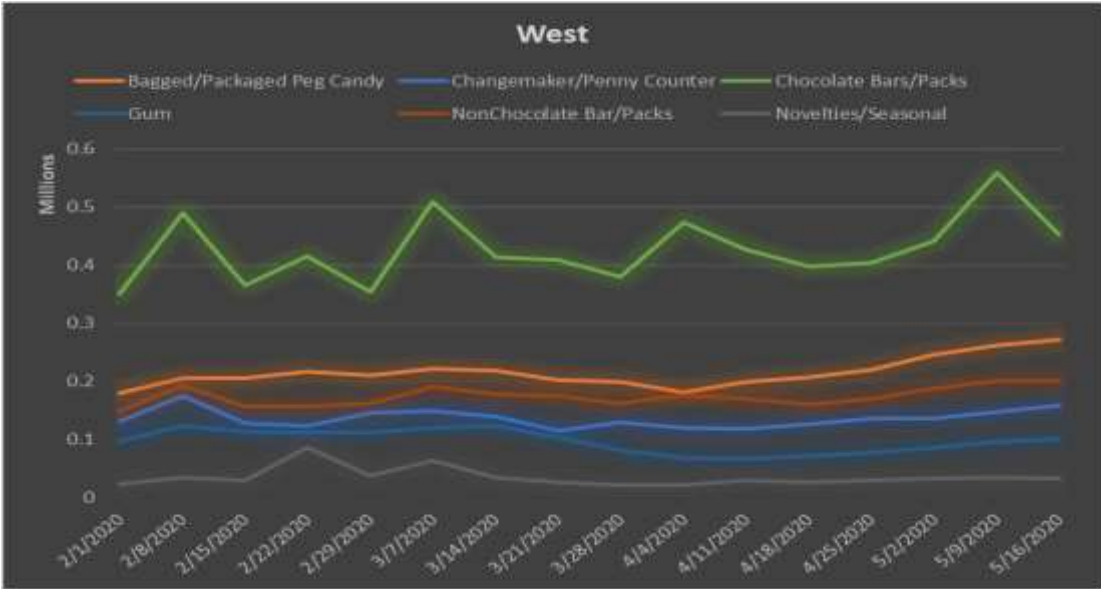
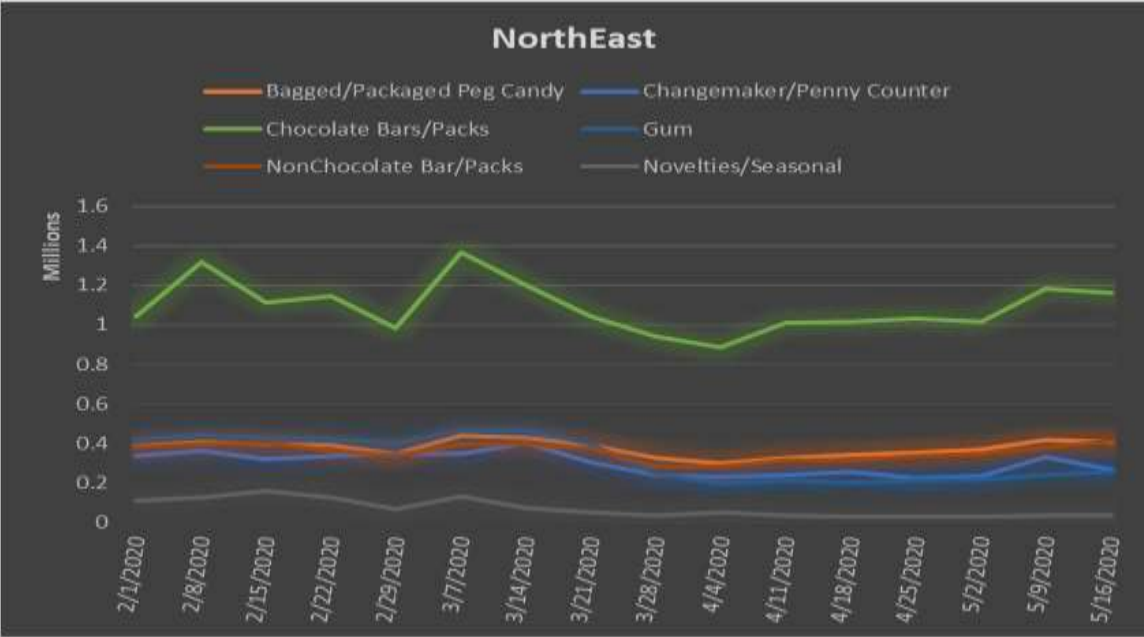
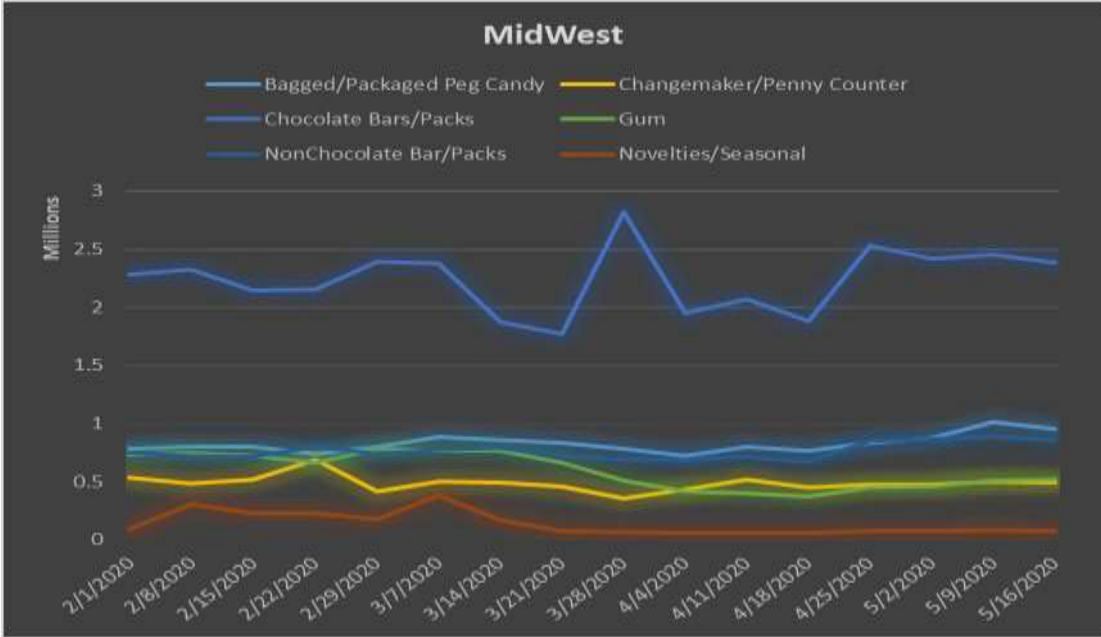


# Regional Performance – Smokeless & Cigars

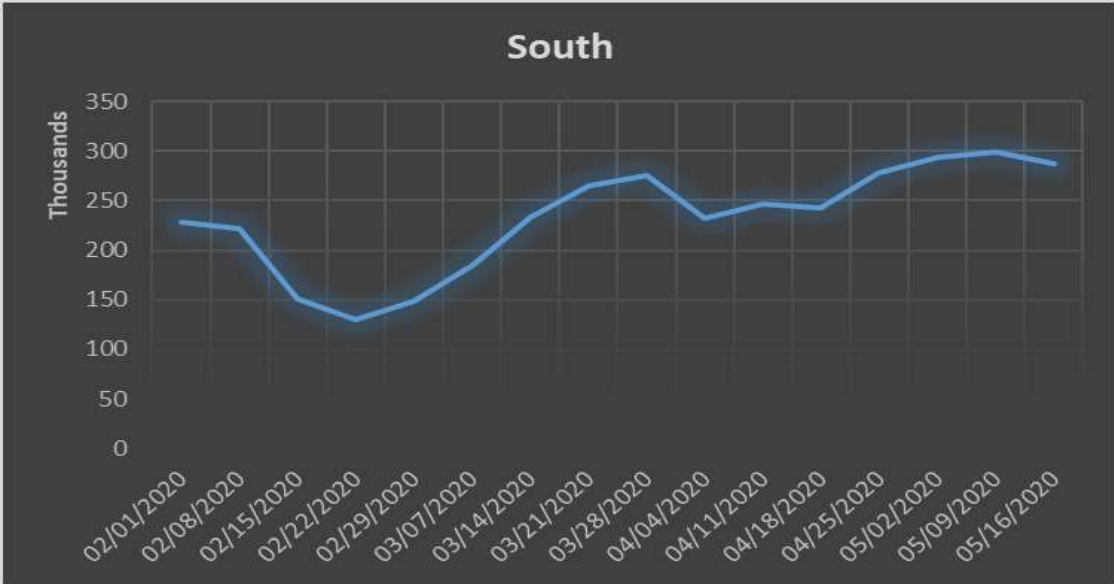
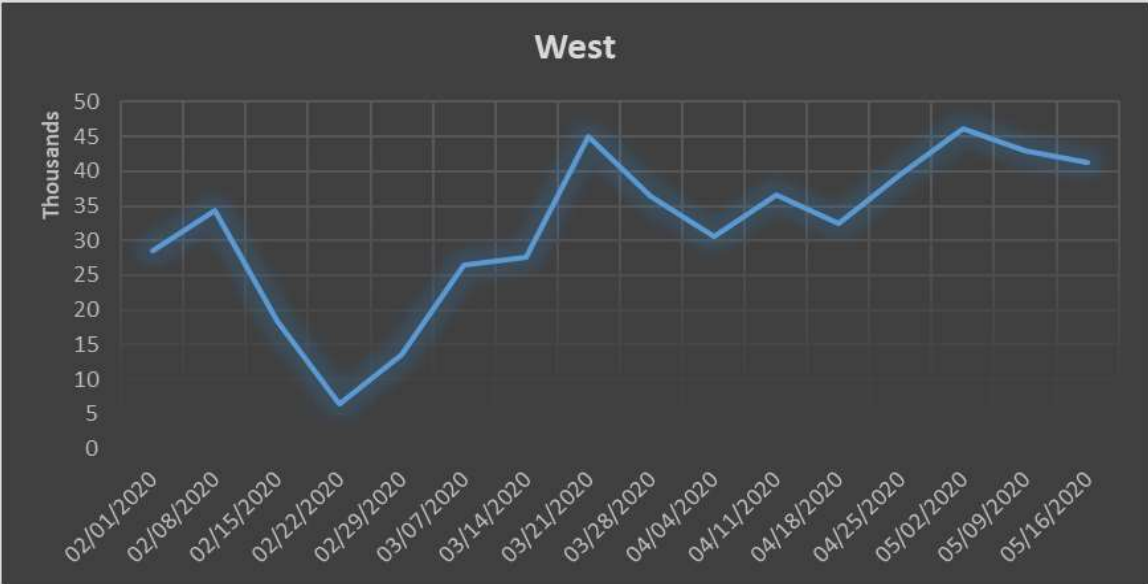
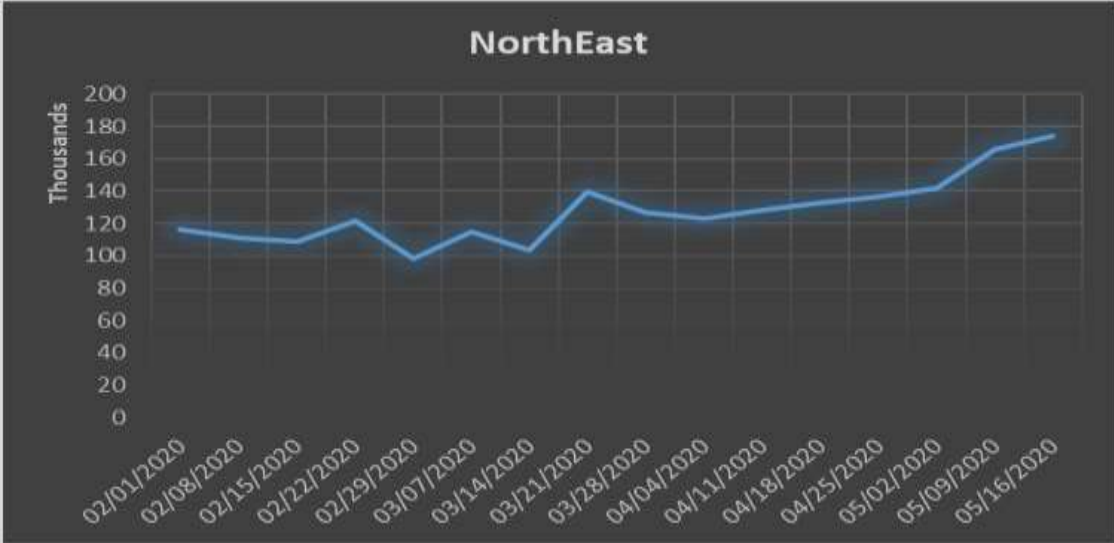
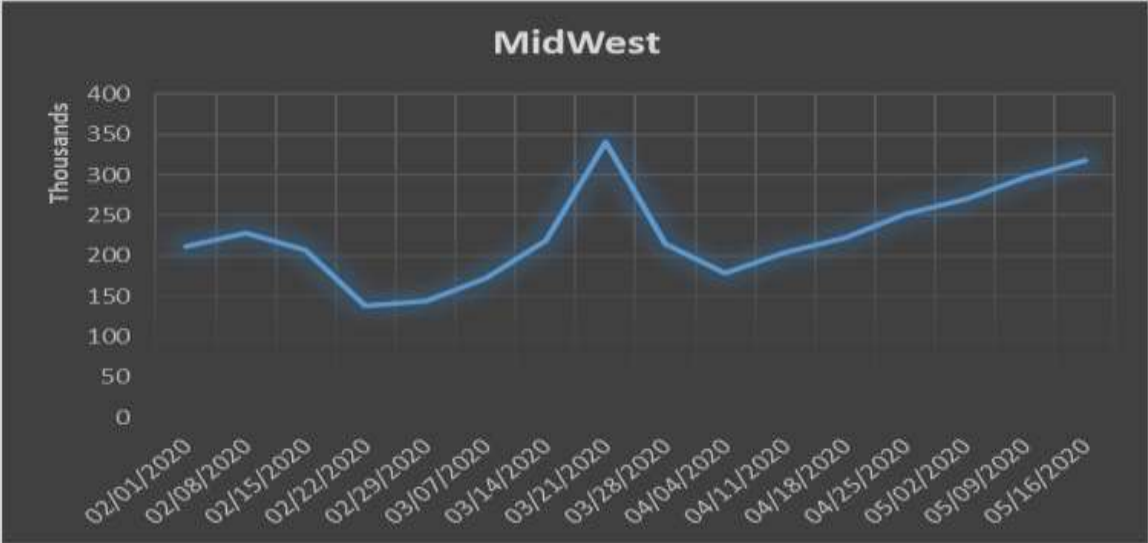




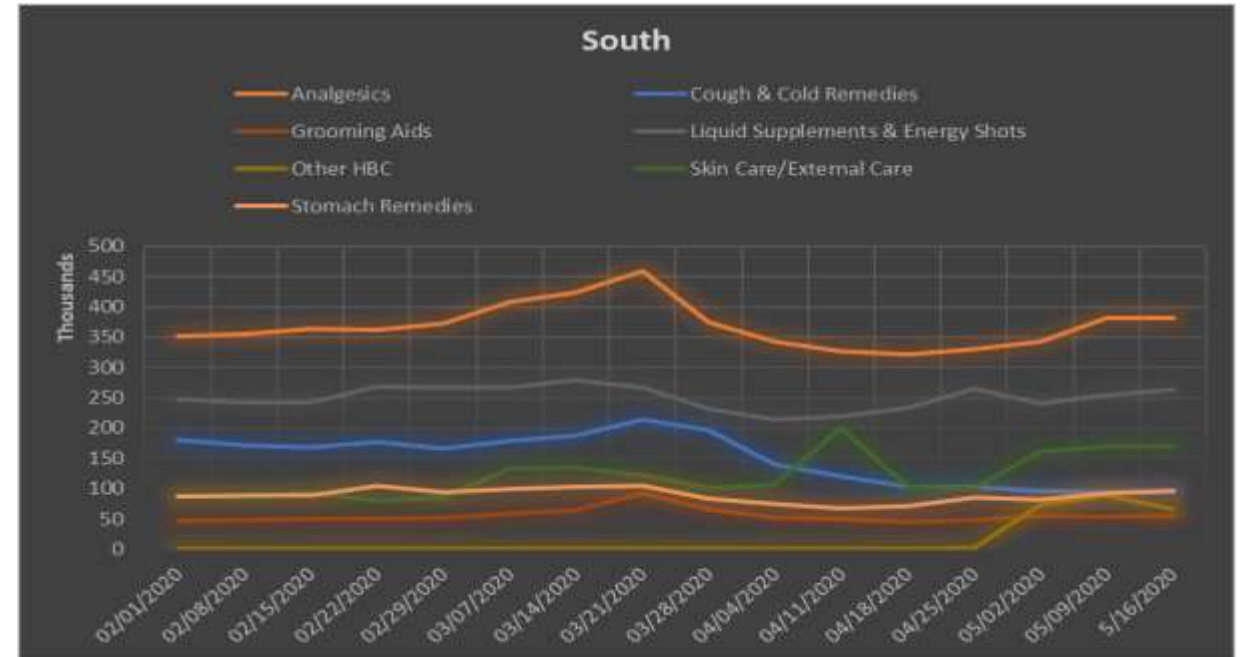
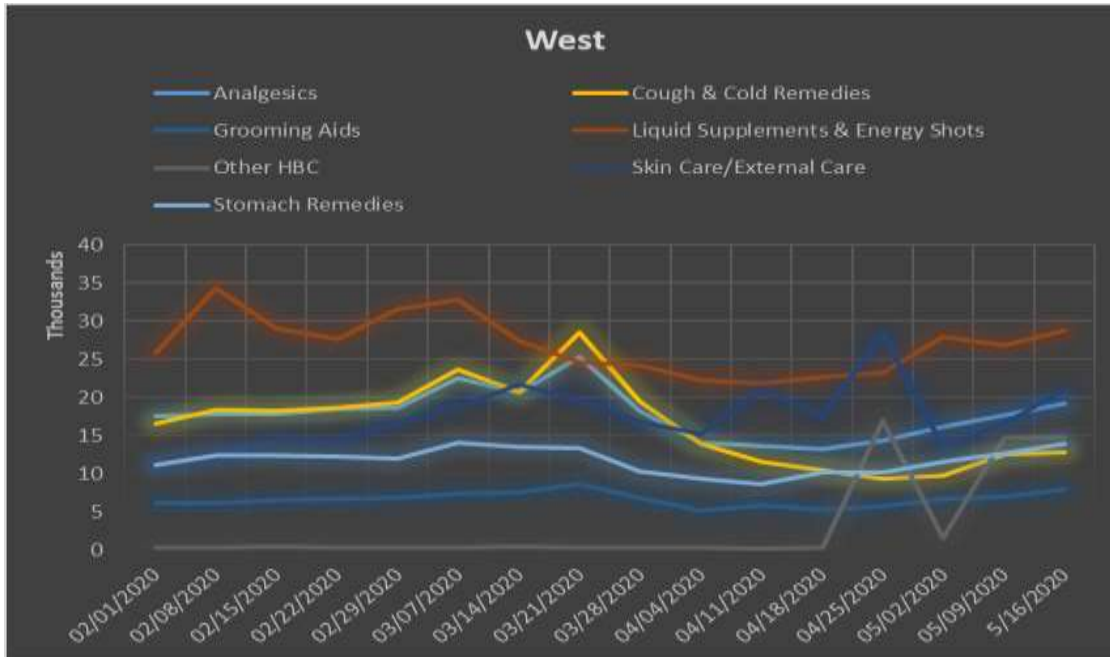
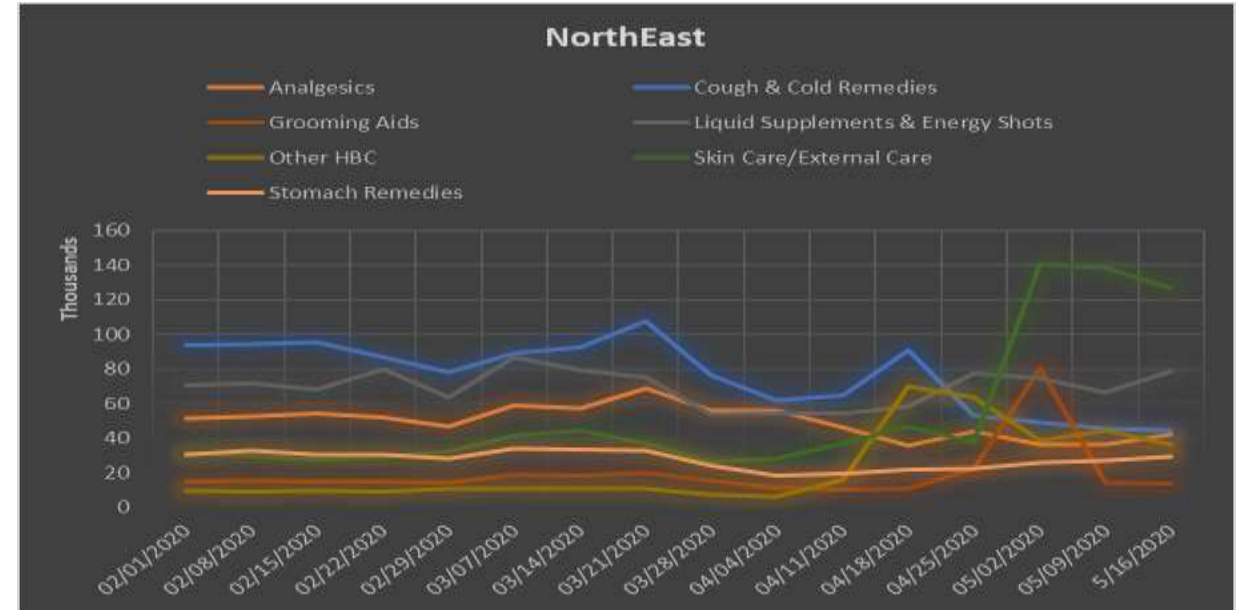
# Regional Performance - Candy



# Regional Performance - Vaping

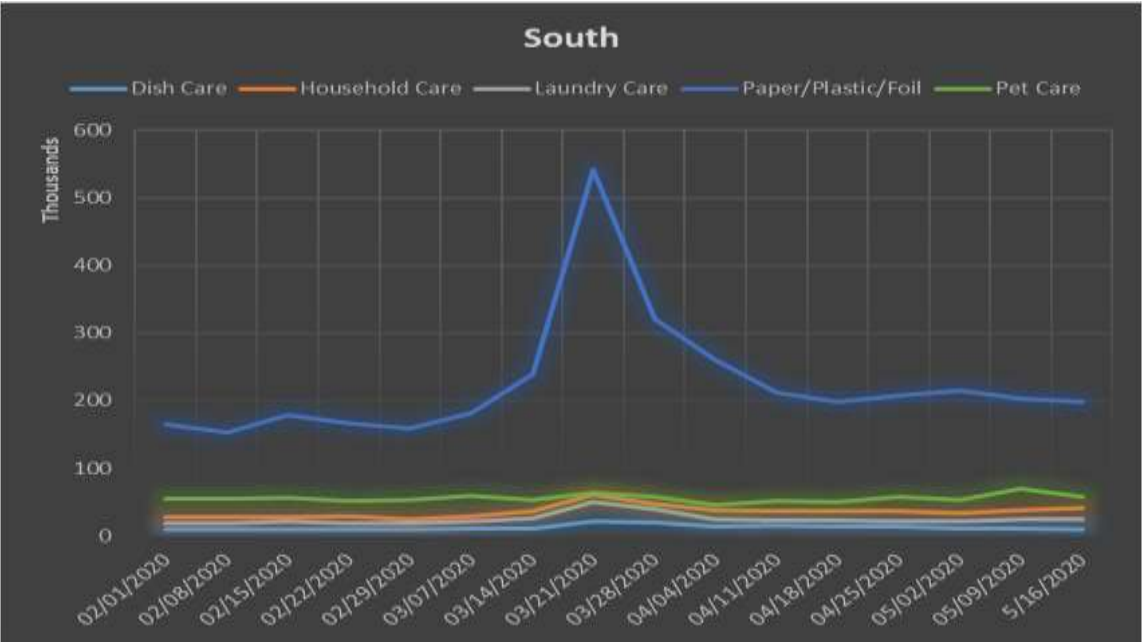
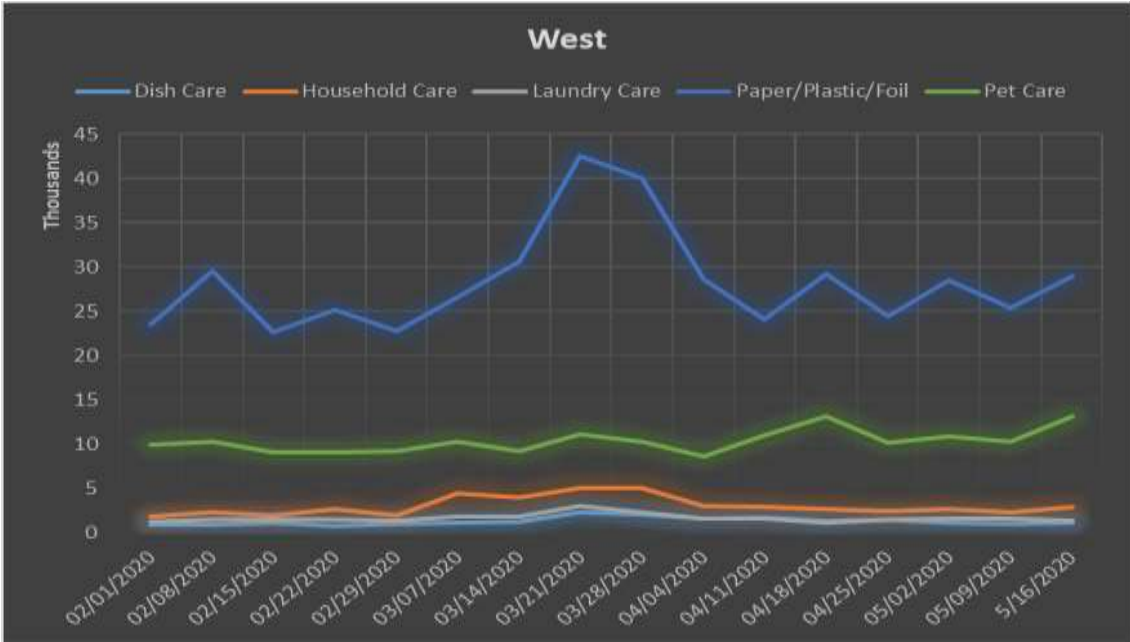
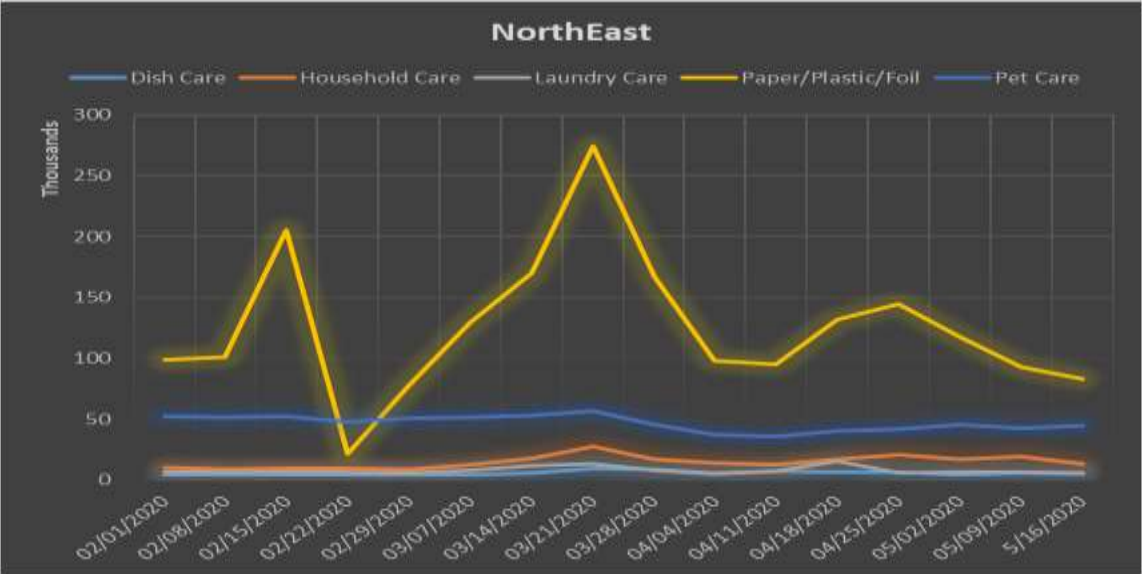
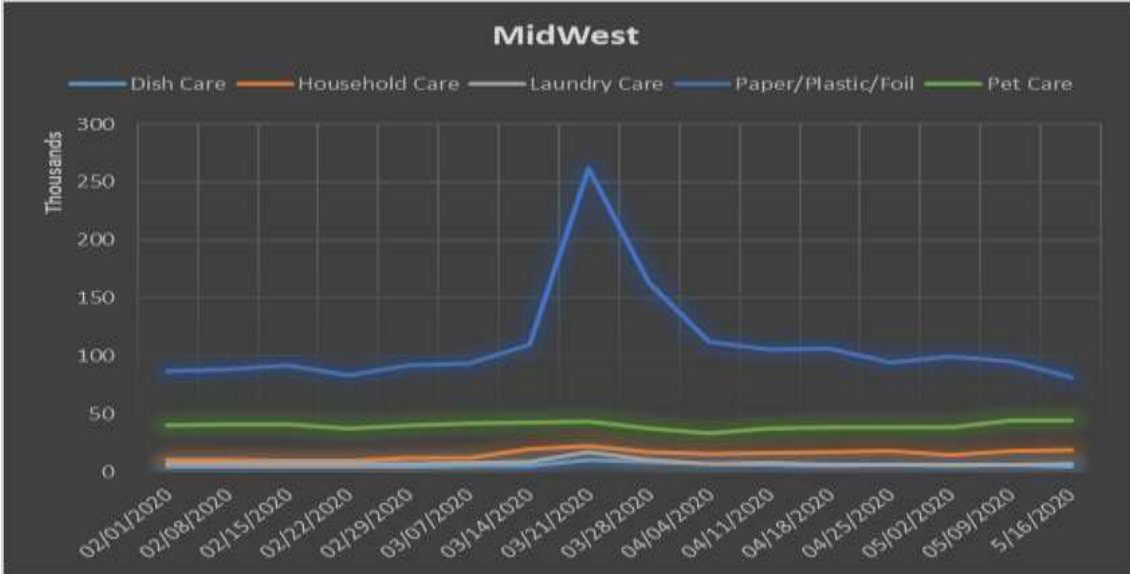


## Regional Performance – Health & Beauty





# Regional Performance – Non-Edible Grocery





## Summary

- The Come Back - Total C-Store distribution – Units are **DOWN**, Dollars are **UP**
- Cigarette & OTP distribution performing well above the 65-week average.
- Alternative Snacks has some improvement to make and is trending upward.
- Keep an eye on Skin Care/External Care



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

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**Product Manager, InfoMetrics**

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