

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

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- **If you experience technical difficulties, please close your browser and log back in.**



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**Director of Education**

**KKissel@CDAweb.net**



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***Mike Farrah***

**Client Relationship Director,  
Management Science Associates, Inc.**



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Management Science Associates, Inc.**



## Marketplace Trends During COVID-19 – Part 4

*Warehouse-delivered Products*

*September 3, 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<sup>®</sup> Projected Data for warehouse delivered products

# Agenda

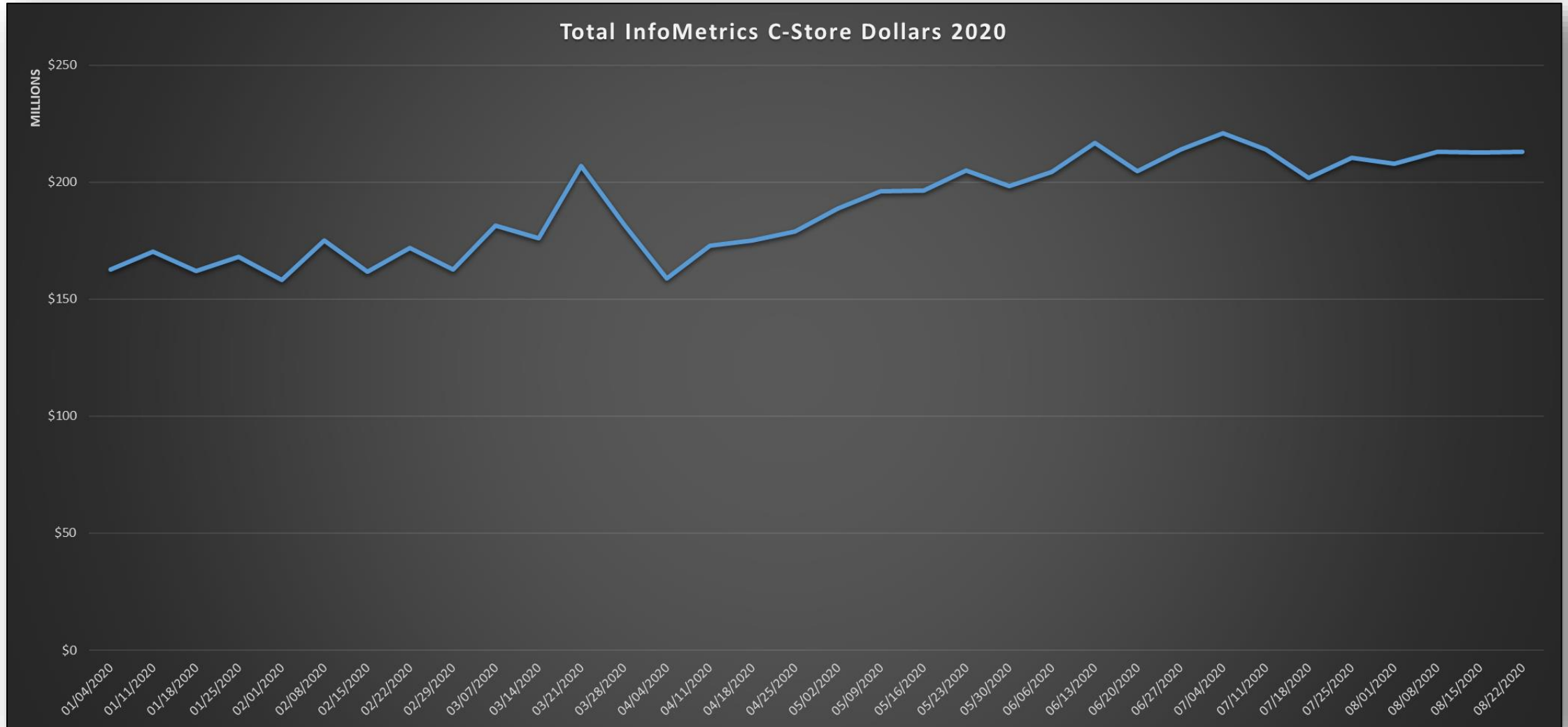
- *Marketplace Behavior*
- *C-Store Performance*
- *Top Categories*
- *Sub Category Performance*
- *Regional Performance*
- *Summary*

# Marketplace Behavior

- *Impact of reopening rules*
- *School and University re-openings*
- *Seasonal Products*
- *New Product launches*
- *Continued legislation – Flavor bans*

# C-Store Performance - Dollars

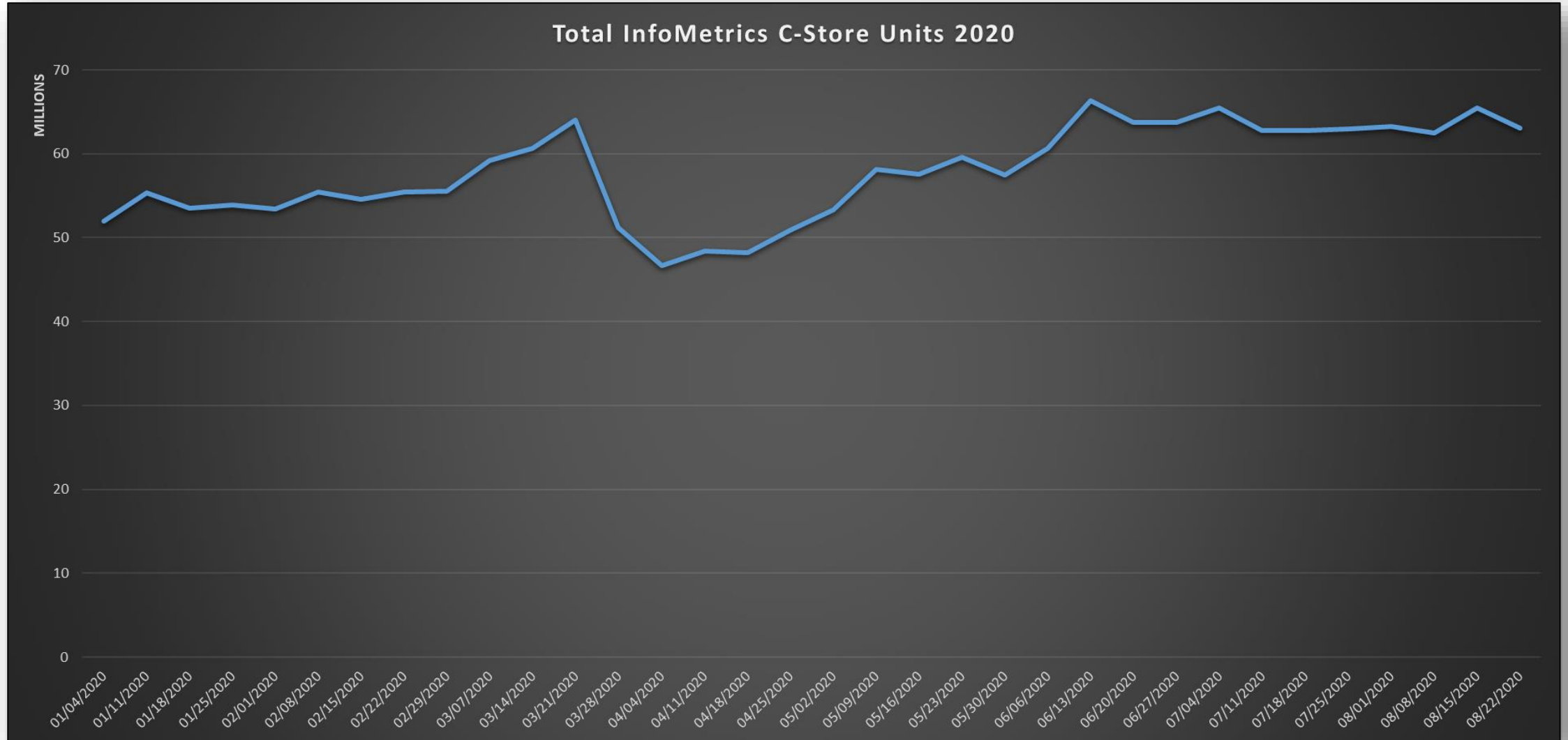
Category	65 WK AVG 2/29/20	4-week averages						8/22/20
		3/28/20	4/25/20	5/23/20	6/20/20	7/18/20	8/15/20	
Total C-Store	\$178.5M	Up 5%	Down 4%	Up 10%	Up 15%	Up 19%	Up 18%	Up 19%





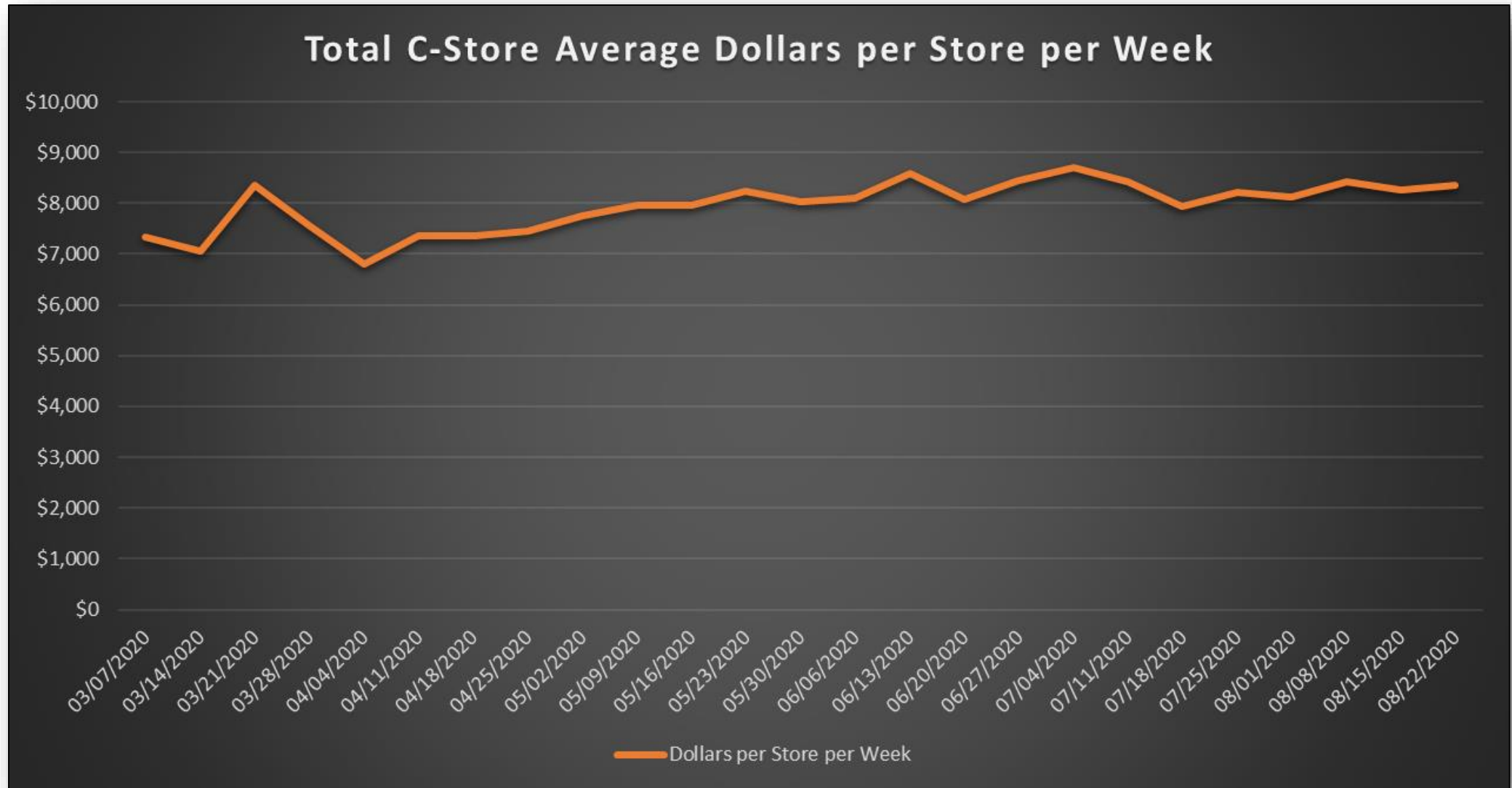
# C-Store Performance - Units

Category	65 WK AVG 2/29/20	4-week averages						8/22/20
		3/28/20	4/25/20	5/23/20	6/20/20	7/18/20	8/15/20	
Total C-Store	60.1M	Down 2%	Down 19%	Down 5%	Up 3%	Up 6%	Up 5%	Up 5%



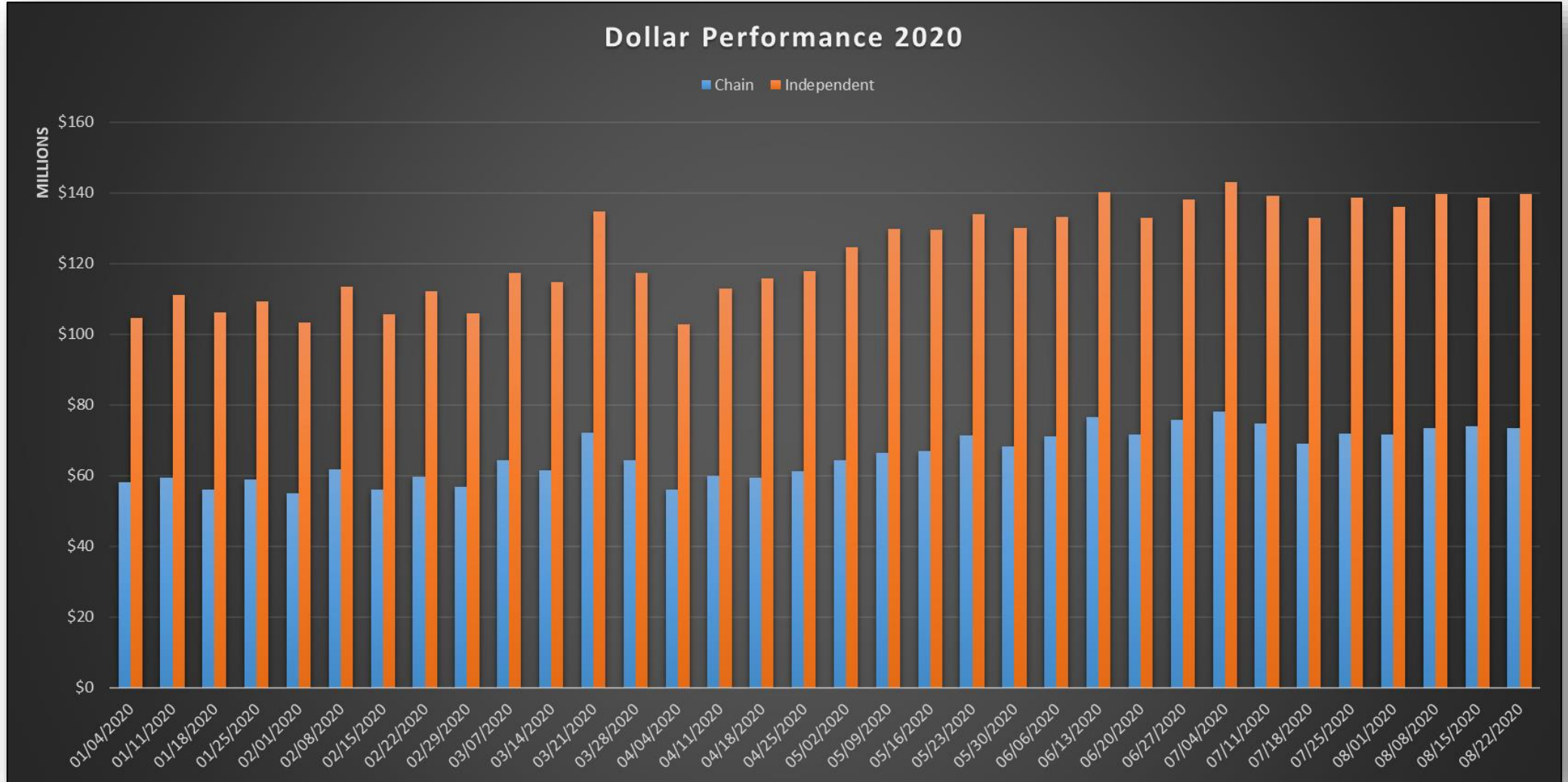
# C-Store Performance – Average Dollars/Store/Week

Category	65 WK AVG 2/29/20	4-week averages						8/22/20
		3/28/20	4/25/20	5/23/20	6/20/20	7/18/20	8/15/20	
Total C-Store	\$7,214	Up 5.1%	Up 0.5%	Up 10.5%	Up 13.7%	Up 16.1%	Up 14.4%	Up 15.7%



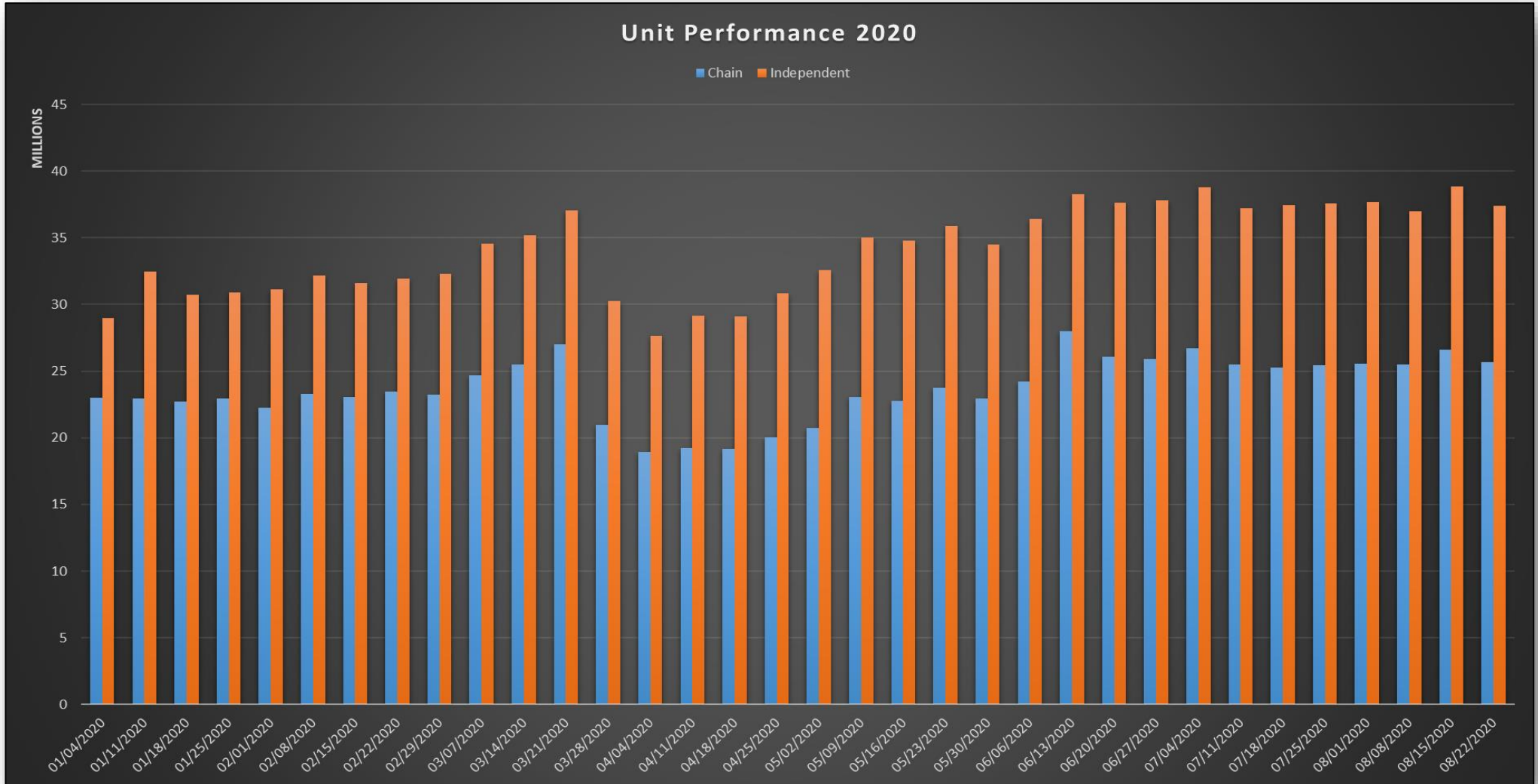
# Chain versus Independent – Dollar Performance

Type	65 WK AVG 2/29/20	4-week averages						8/22/20
		3/28/20	4/25/20	5/23/20	6/20/20	7/18/20	8/15/20	
CHAIN	\$60.5M	Up 9%	Down 2%	Up 11%	Up 19%	Up 23%	Up 13%	Up 22%
INDEPENDENTS	\$117.2M	Up 3%	Down 4%	Up 10%	Up 14%	Up 18%	Up 10%	Up 19%

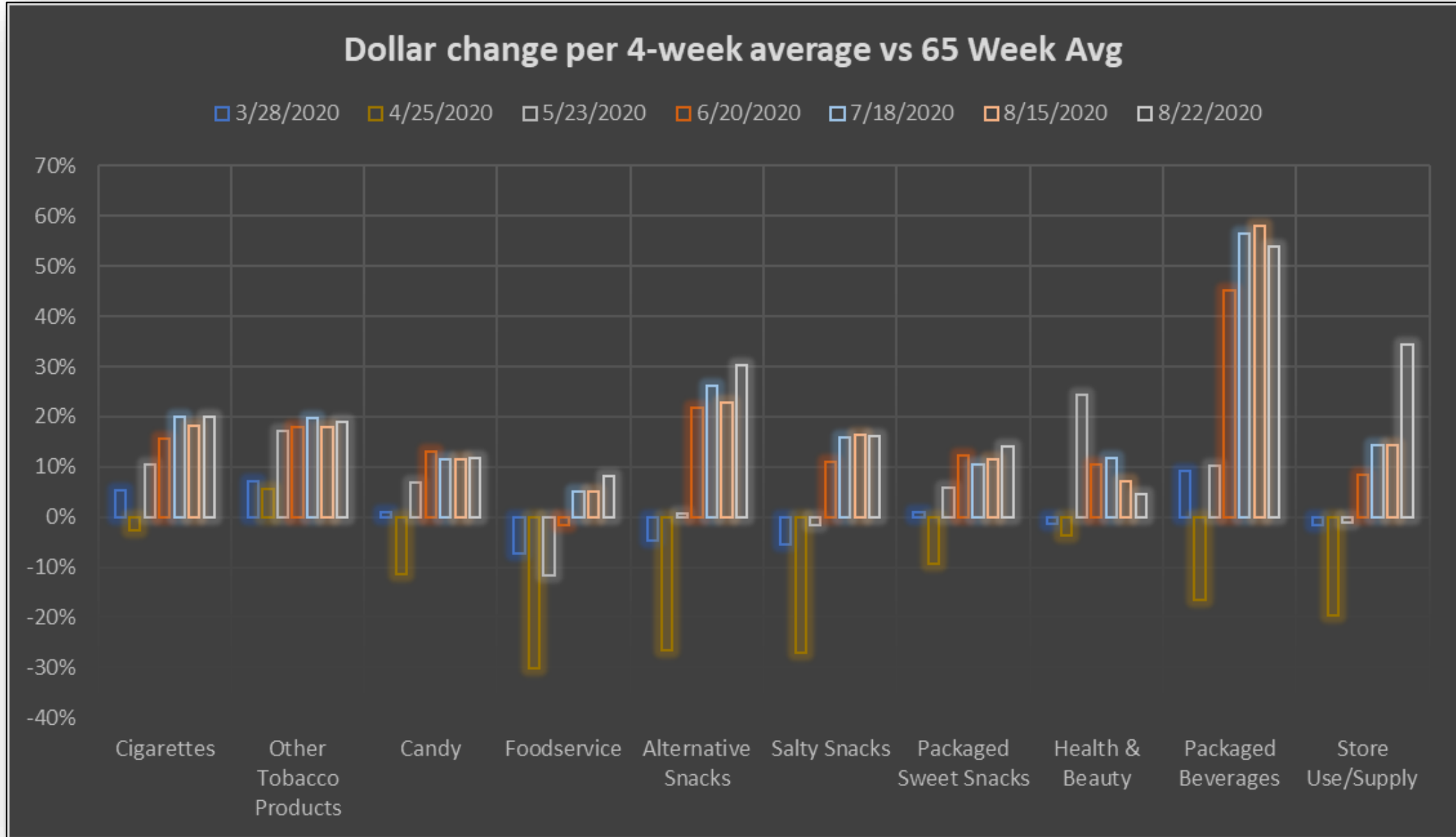


# Chain versus Independent – Unit Performance

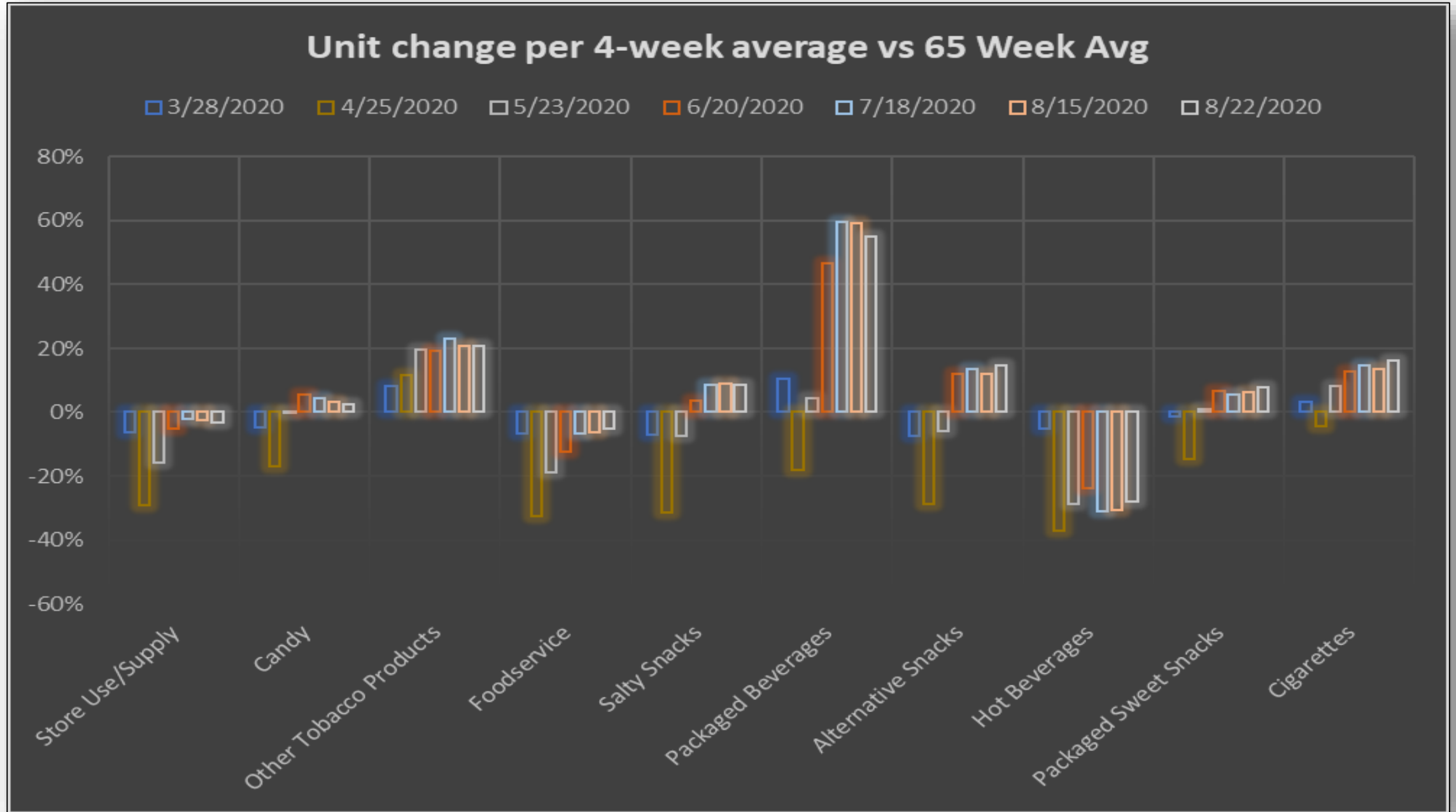
Type	65 WK AVG 2/29/20	4-week averages						8/22/20
		3/28/20	4/25/20	5/23/20	6/20/20	7/18/20	8/15/20	
CHAIN	25.4M	Down 4%	Down 24%	Down 11%	Down 1%	Up 2%	Up 1%	Up 1%
INDEPENDENTS	34.6M	Down 1%	Down 16%	EVEN	Up 6%	Up 9%	Up 9%	Up 8%



# Category Performance – Dollars

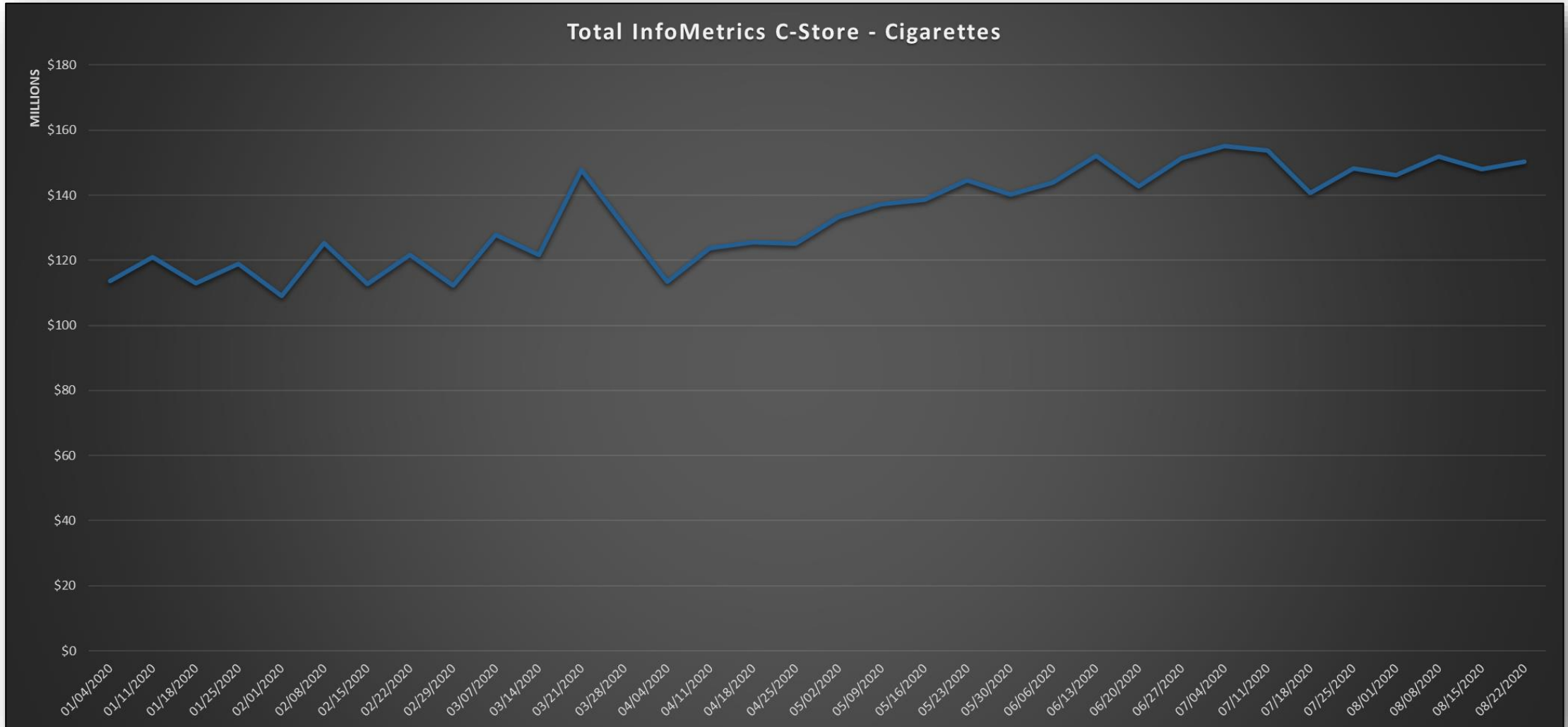


# Category Performance – Units



# Category Performance – Cigarettes - Dollars

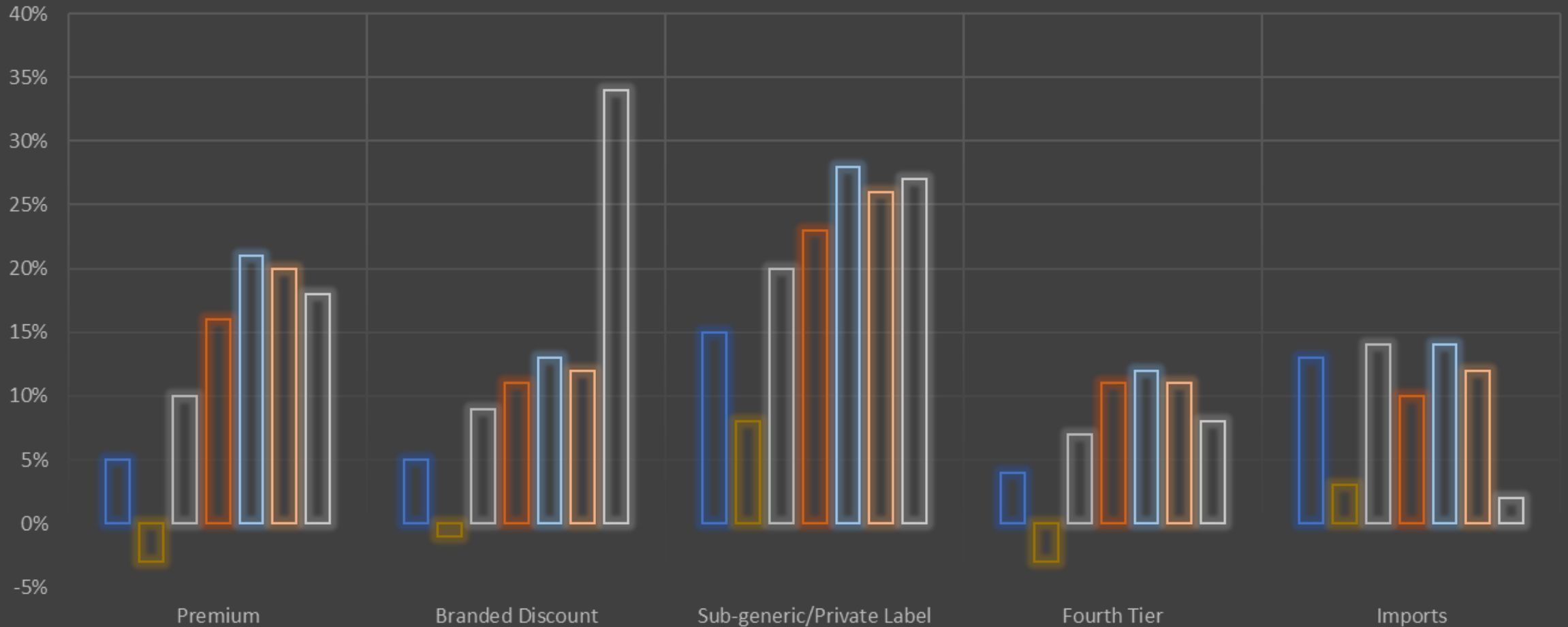
Category	65 WK AVG 2/29/20	4-week averages						8/22/20
		3/28/20	4/25/20	5/23/20	6/20/20	7/18/20	8/15/20	
Cigarettes	\$125.3M	Up 5%	Down 3%	Up 11%	Up 16%	Up 20%	Up 18%	Up 20%



# Sub Category Performance – Cigarettes- Dollars

## Dollar change per 4-week average vs 65 Week

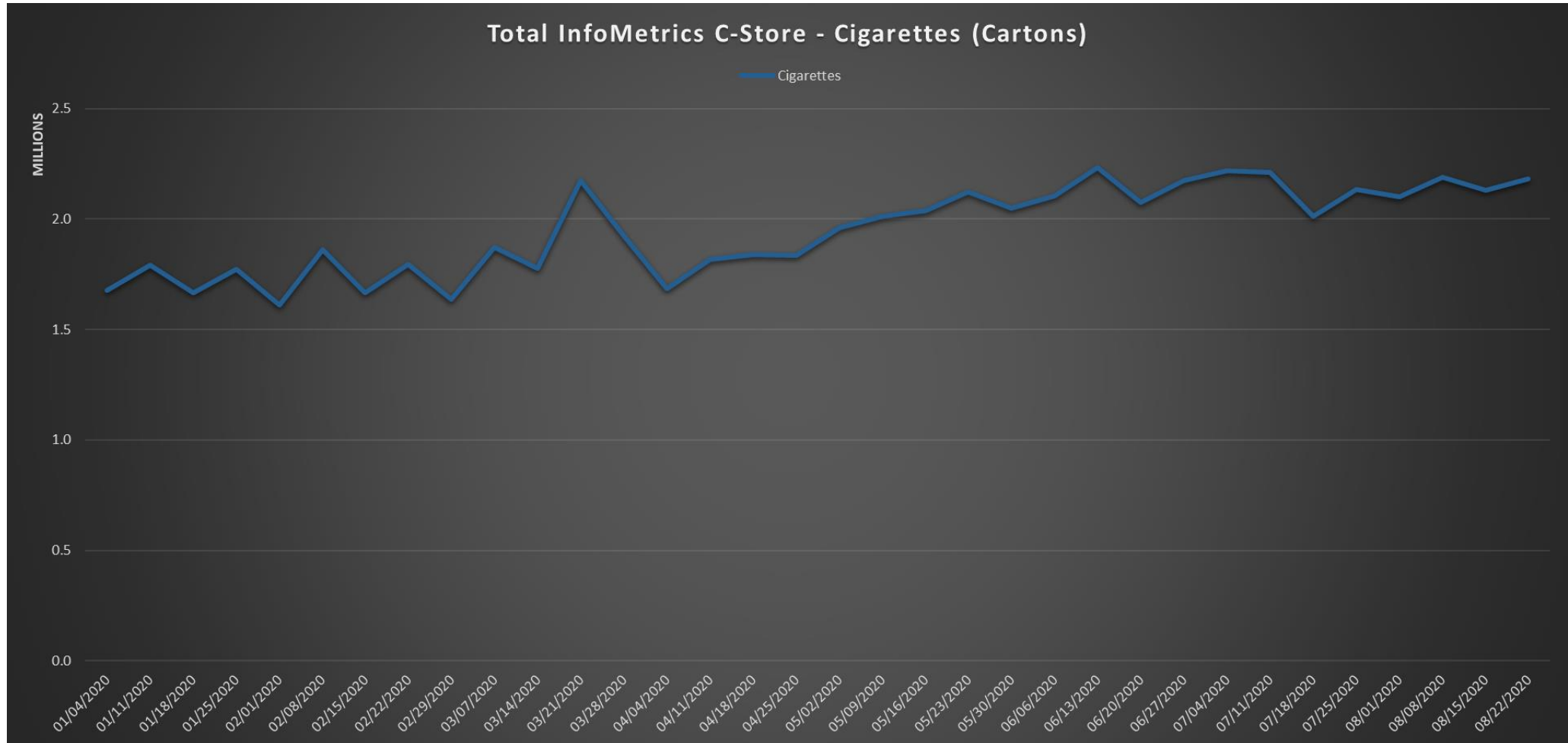
3/28/2020 4/25/2020 5/23/2020 6/20/2020 7/18/2020 8/15/2020 8/22/2020





# Category Performance – Cigarettes - Units

Category	65 WK AVG 2/29/20	4-week averages						8/22/20
		3/28/20	4/25/20	5/23/20	6/20/20	7/18/20	8/15/20	
Cigarettes	1.9M	Up 3.0%	Down 6.0%	Up 4.4%	Up 5.9%	Up 4.8%	Up 3.3%	Up 7.4%

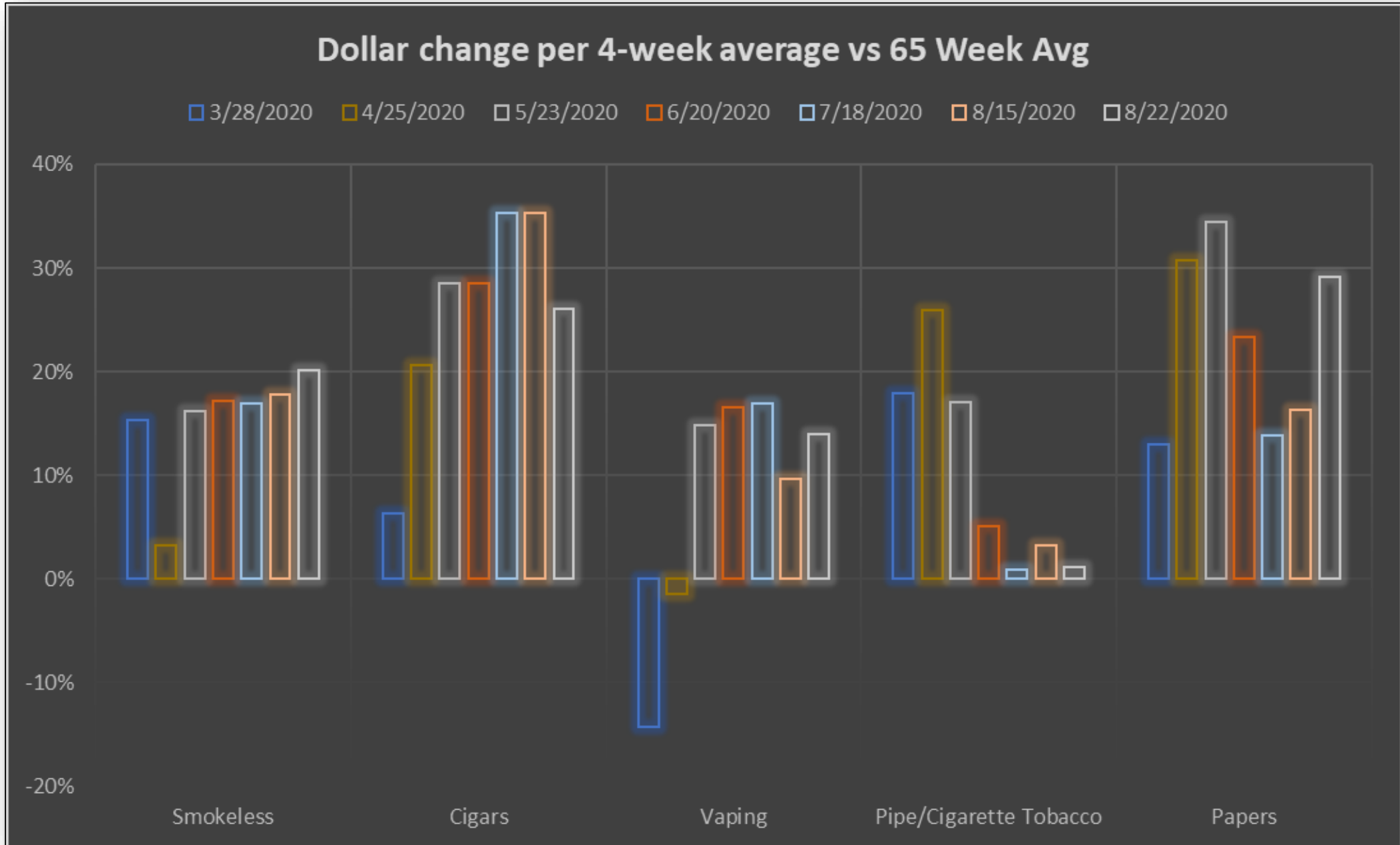


# Category Performance – OTP - Dollars

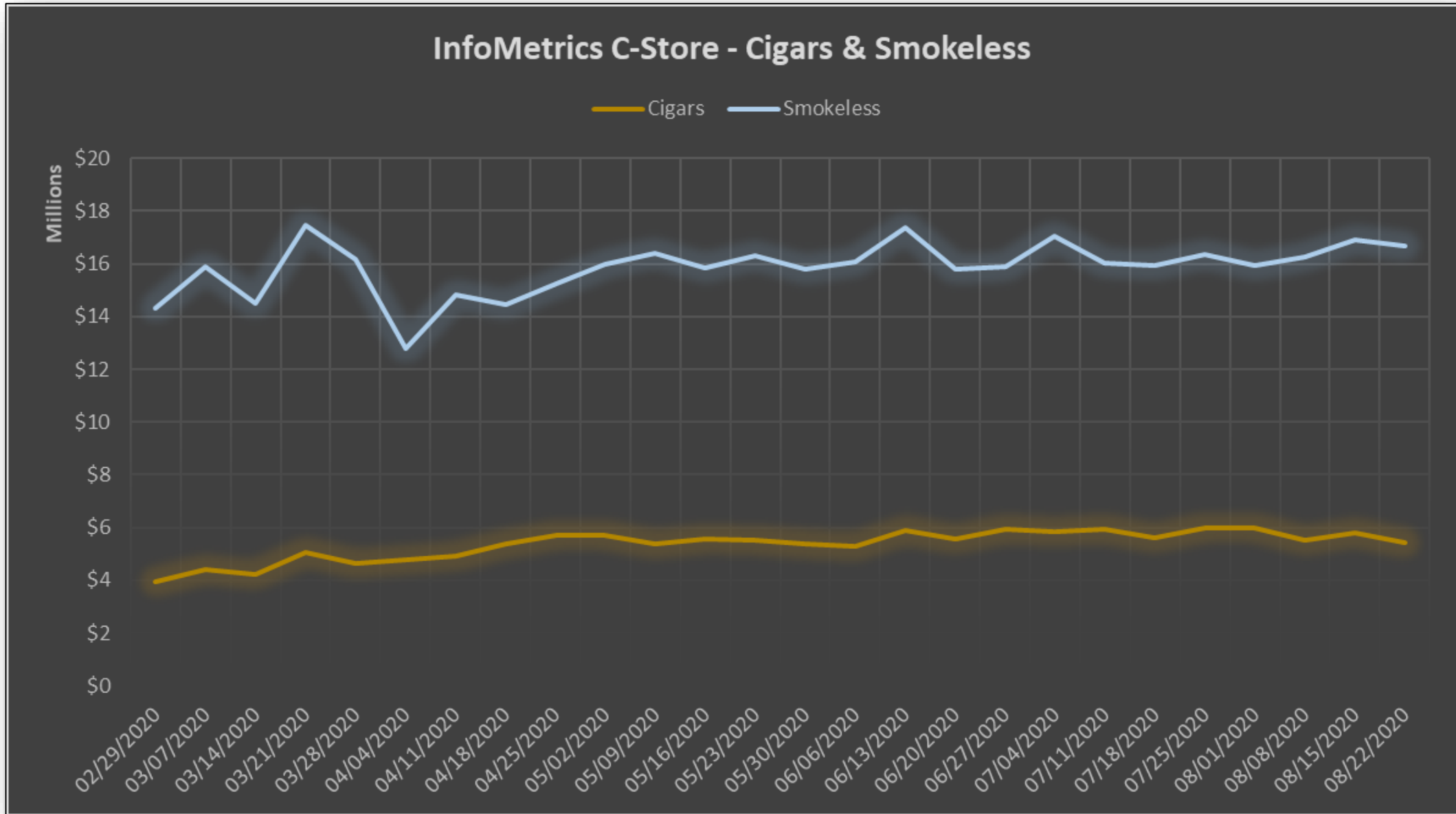
Category	65 WK AVG 2/29/20	4-week averages						8/22/20
		3/28/20	4/25/20	5/23/20	6/20/20	7/18/20	8/15/20	
OTP	\$23.2M	Up 7%	Up 5%	Up 17%	Up 18%	Up 20%	Up 18%	Up 19%



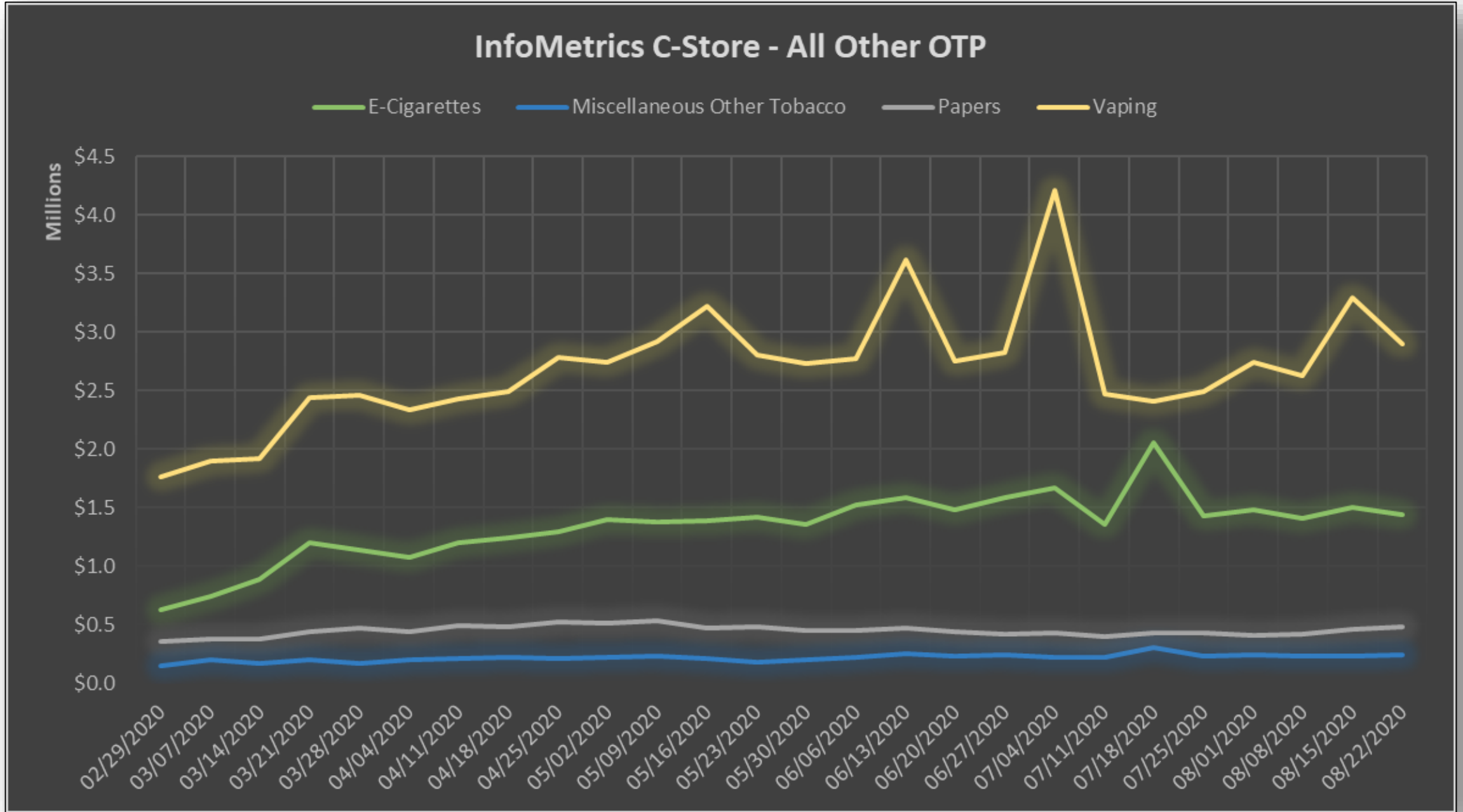
# Sub Category Performance – Other Tobacco Products - Dollars



# Sub Category Performance – OTP - Dollars



# Sub Category Performance – OTP - Dollars

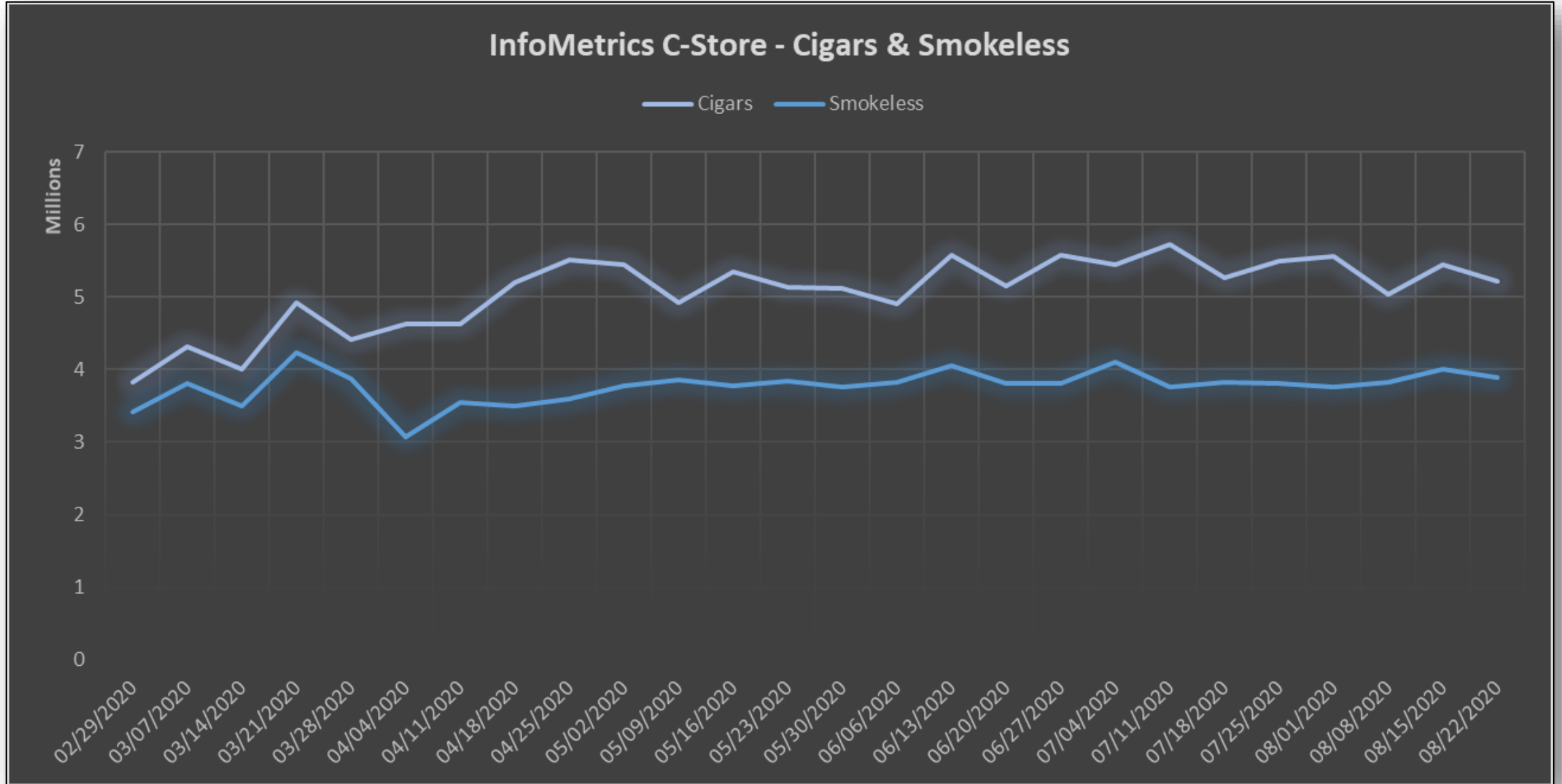


# Category Performance –OTP - Units

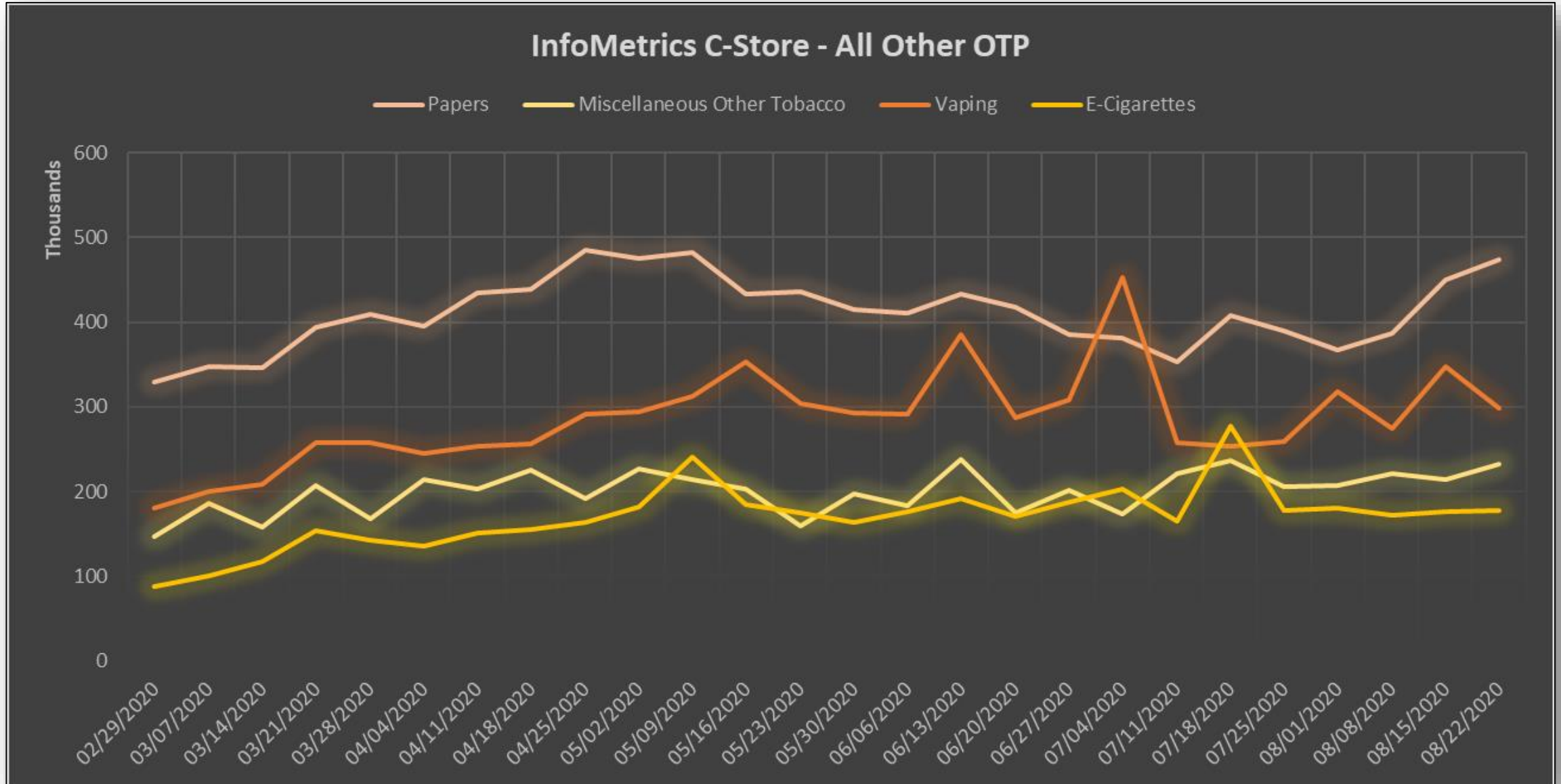
Category	65 WK AVG 2/29/20	4-week averages						8/22/20
		3/28/20	4/25/20	5/23/20	6/20/20	7/18/20	8/15/20	
OTP	8.5M	Up 8%	Up 12%	Up 20%	Up 19%	Up 23%	Up 21%	Up 21%



# Sub Category Performance – OTP - Units

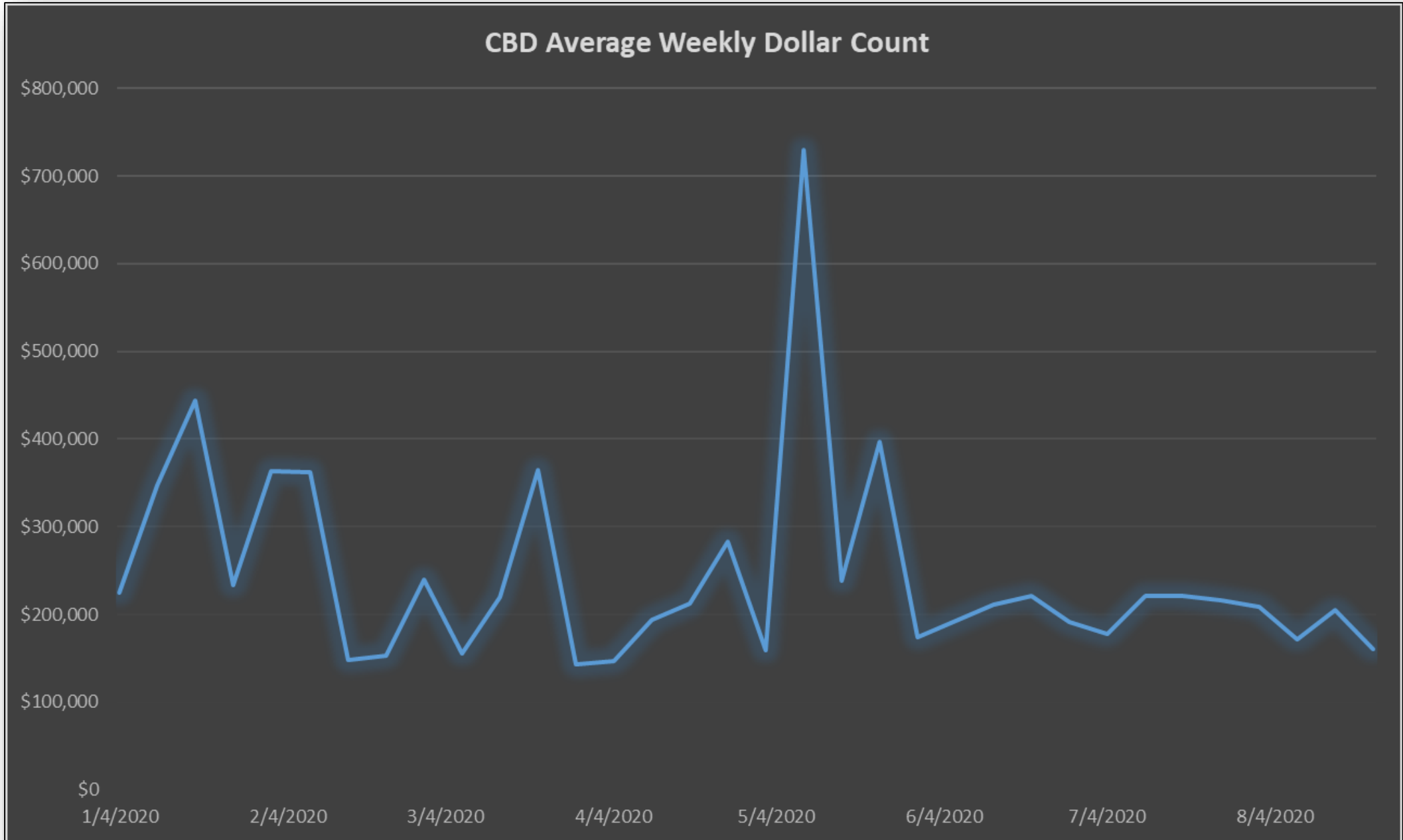


# Sub Category Performance – Other OTP - Units



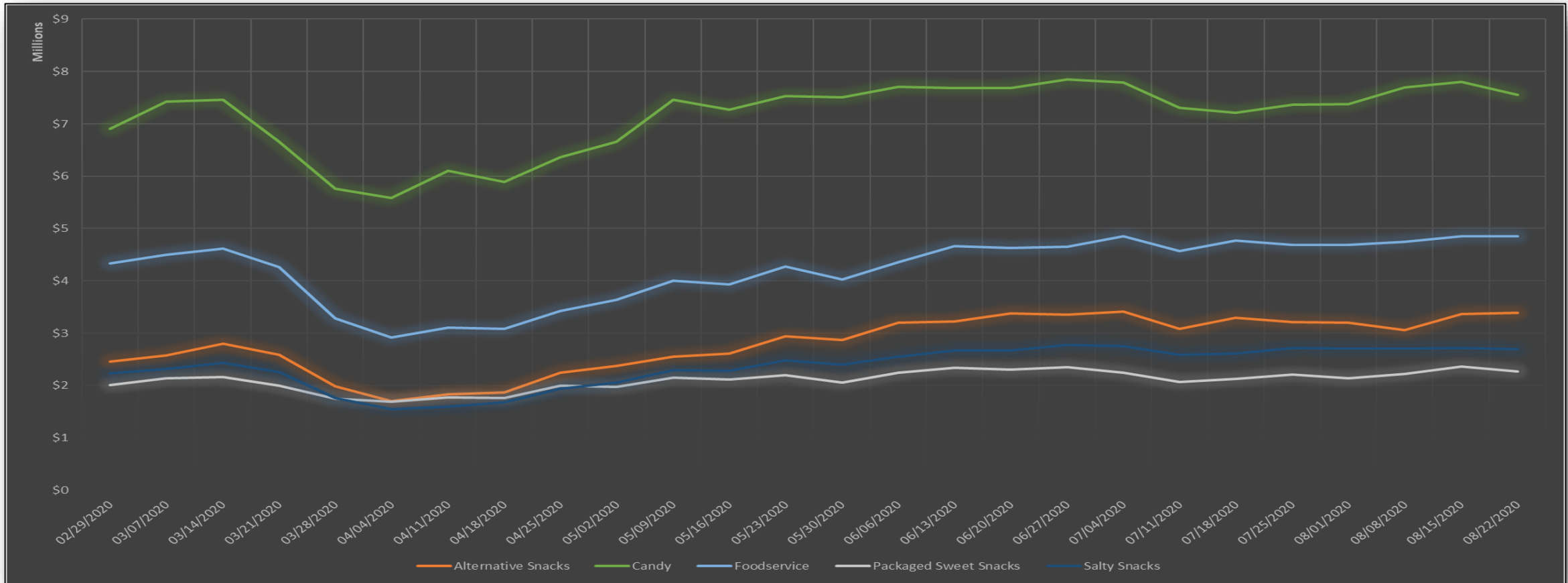


# Category Performance – CBD - Dollars



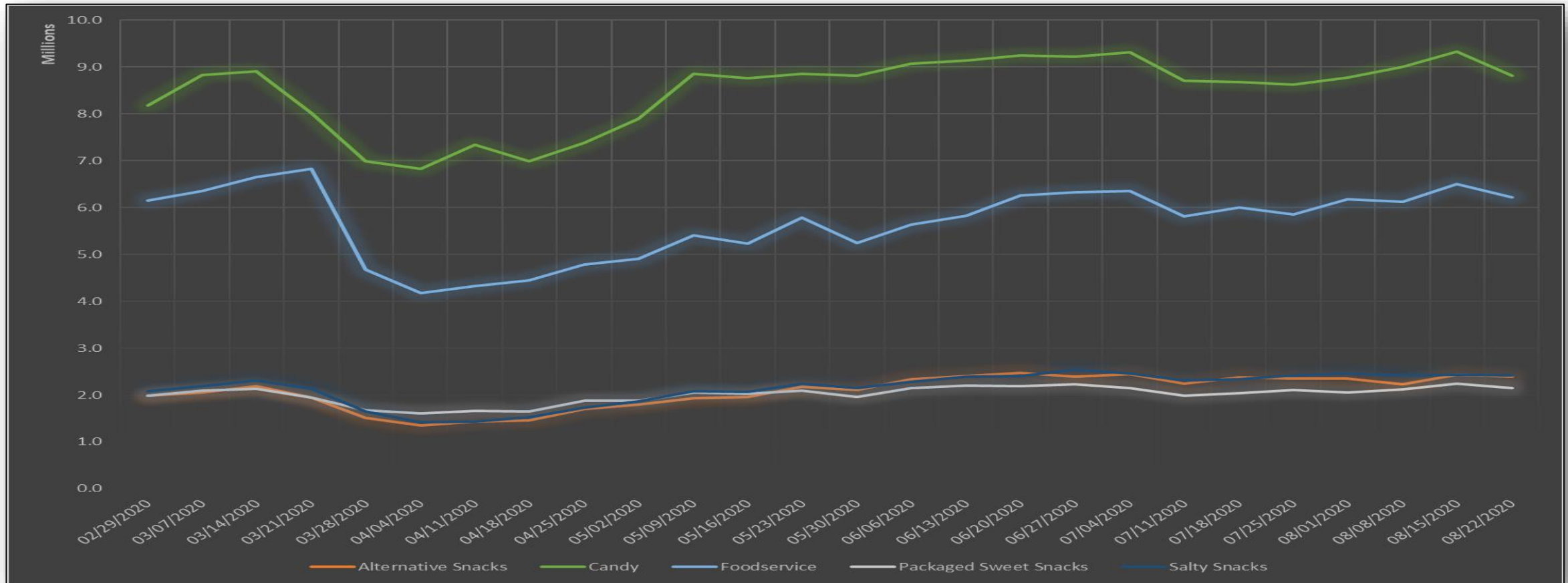
# Category Performance – Non-Tobacco Top Categories - Dollars

Category	65 WK AVG 2/29/20	4-week averages						8/22/20
		3/28/20	4/25/20	5/23/20	6/20/20	7/18/20	8/15/20	
Candy	\$6.7M	Up 1%	Down -11%	Up 7%	Up 13%	Up 12%	Up 11%	Up 12%
Foodservice	\$4.5M	Down -7%	Down -30%	Down-12%	Down -2%	Up 5%	Up 5%	Up 8%
Salty Snacks	\$2.3M	Down -5%	Down -27%	Down -2%	Up 11%	Up 16%	Up 16%	Up 16%
Pkg Sweet Snacks	\$2.0M	Up 1%	Down -9%	Up 6%	Up 12%	Up 11%	Up 12%	Up 14%
Alternative Snacks	\$2.6M	Down -5%	Down -27%	Up 1%	Up 22%	Up 26%	Up 23%	Up 30%

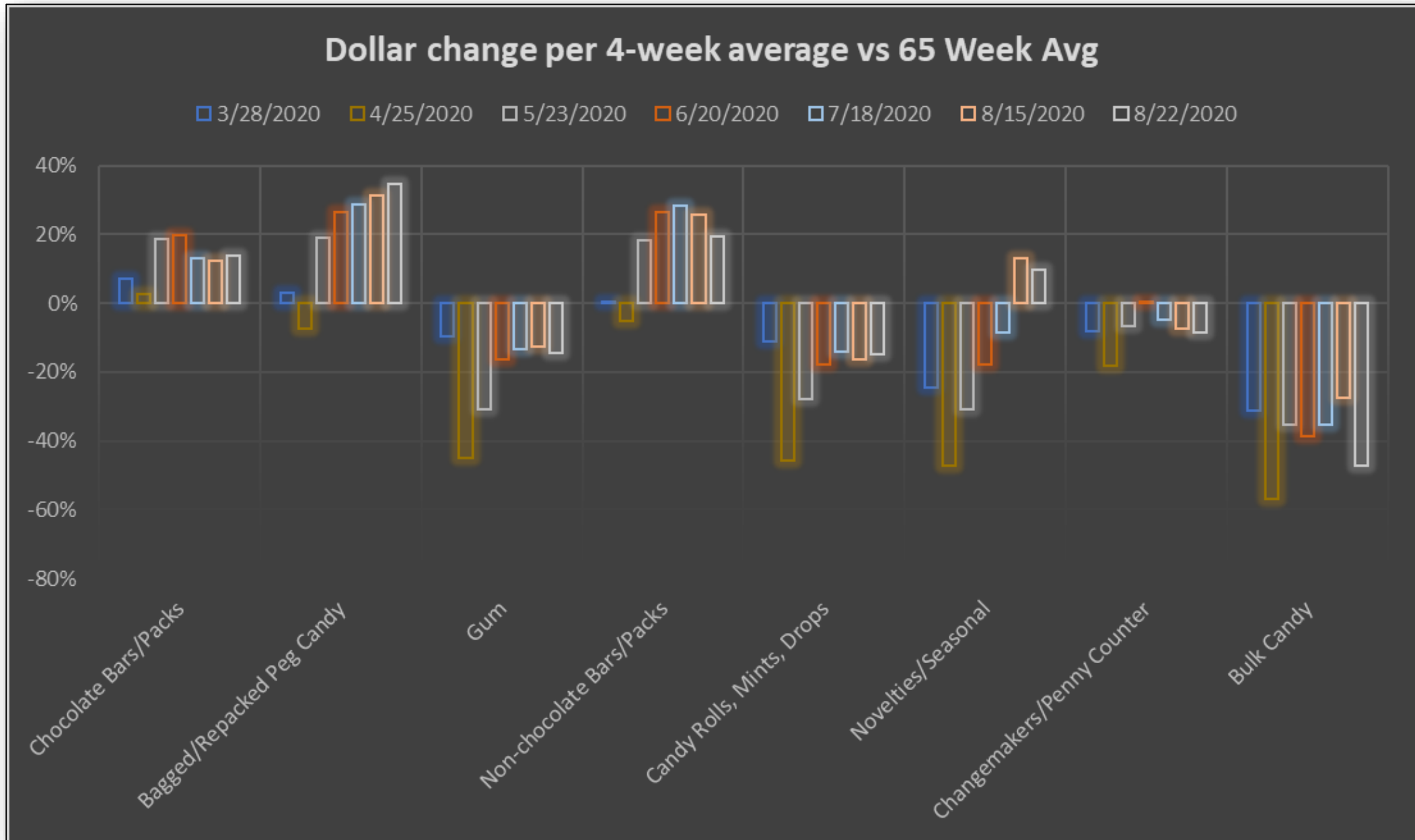


# Category Performance – Non-Tobacco Top Categories - Units

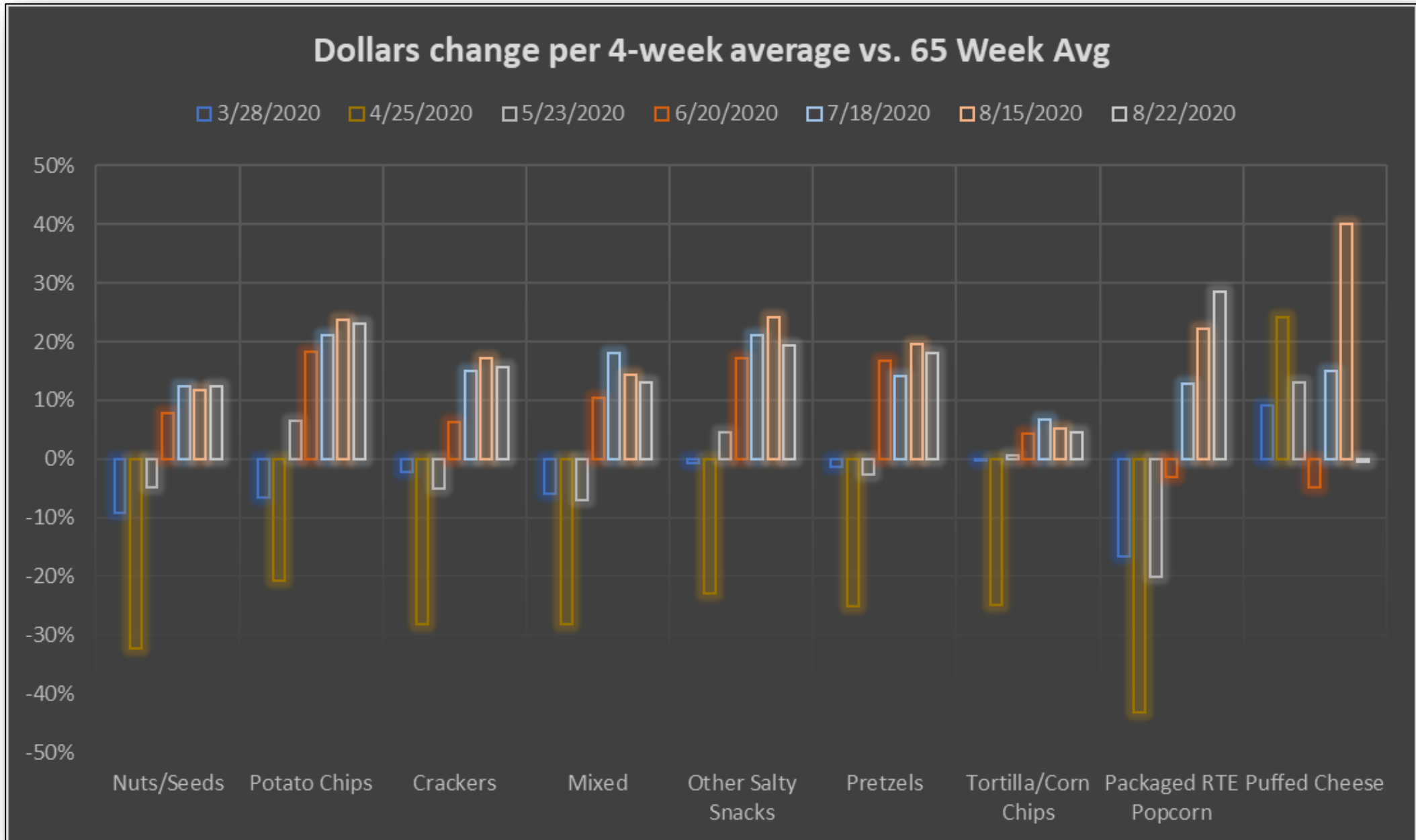
Category	65 WK AVG 2/29/20	4-week averages						8/22/20
		3/28/20	4/25/20	5/23/20	6/20/20	7/18/20	8/15/20	
Candy	8.6M	Down -5%	Down -17%	EVEN	Up 5%	Up 4%	Up 3%	Up 2%
Foodservice	6.5M	Down -7%	Down -32%	Down -19%	Down -13%	Down -7%	Down -6%	Down -5%
Salty Snacks	2.2M	Down -7%	Down -31%	Down -7%	Up 4%	Up 8%	Up 9%	Up 8%
Pkg Sweet Snacks	2.0M	Down -1%	Down -15%	Up 1%	Up 7%	Up 5%	Up 6%	Up 8%
Alternative Snacks	2.1M	Down -8%	Down -29%	Down -6%	Up 12%	Up 13%	Up 12%	Up 15%



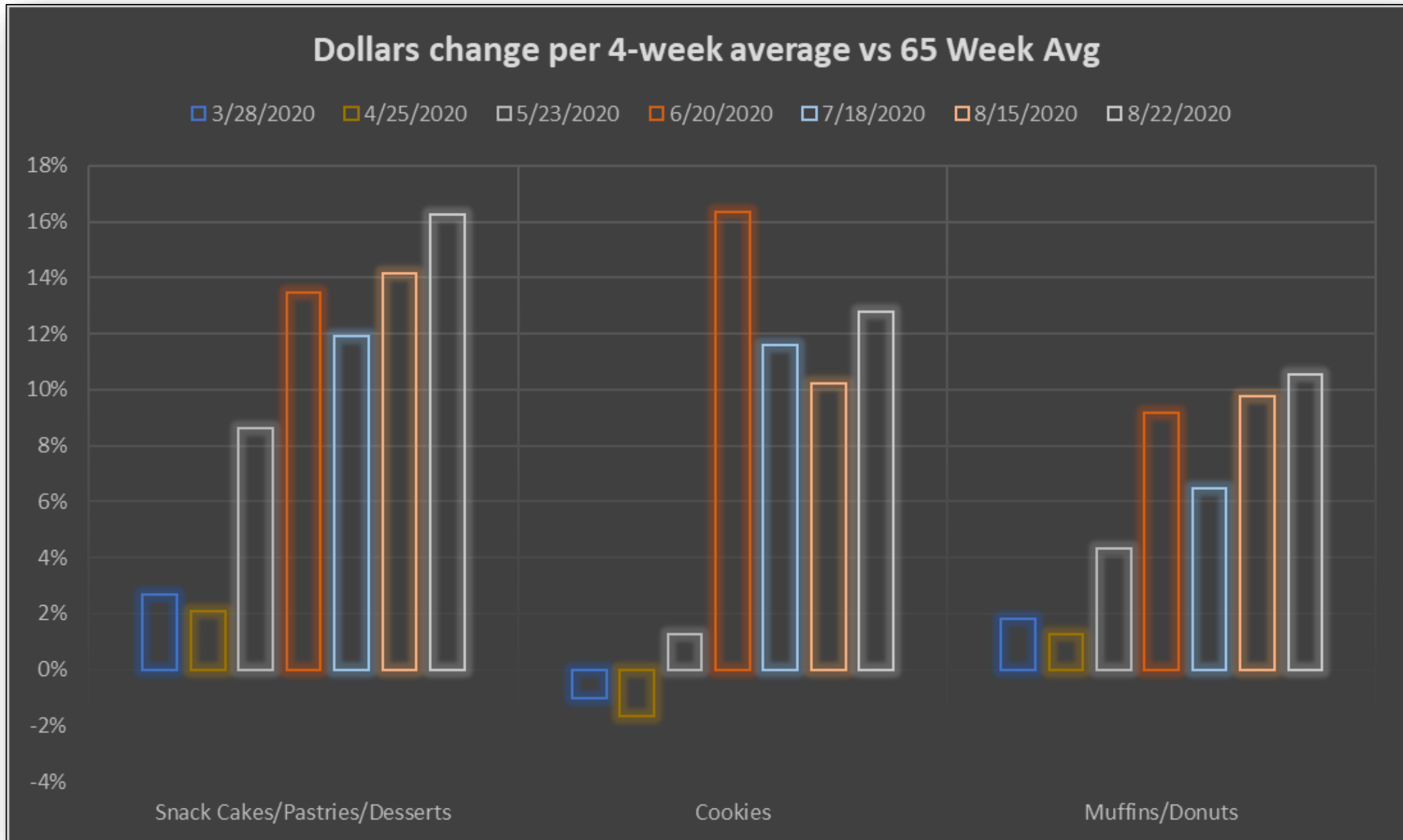
# Sub Category Performance – Candy - Dollars



# Sub Category Performance – Salty Snacks - Dollars



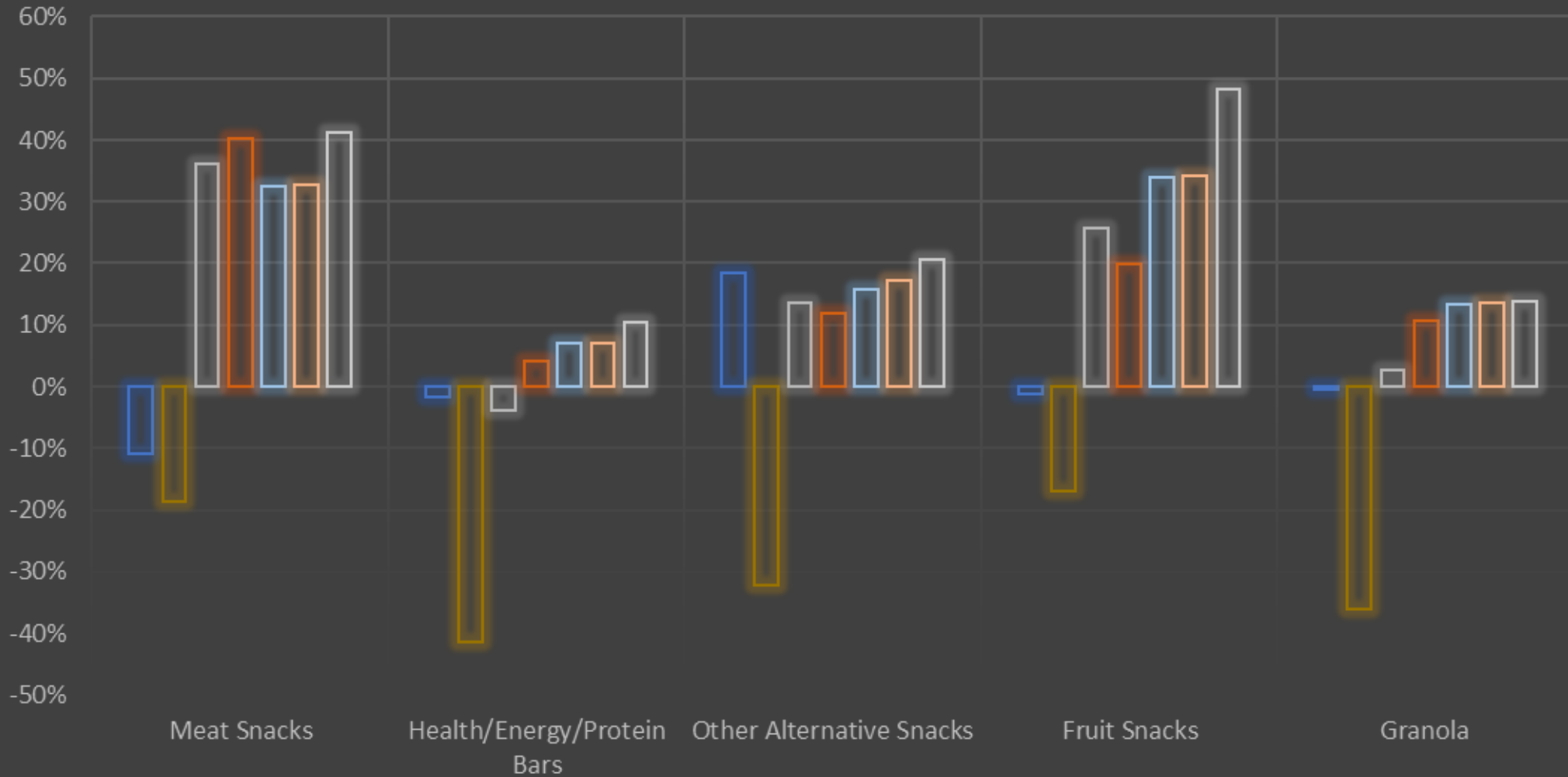
# Sub Category Performance – Packaged Sweet Snacks- Dollars



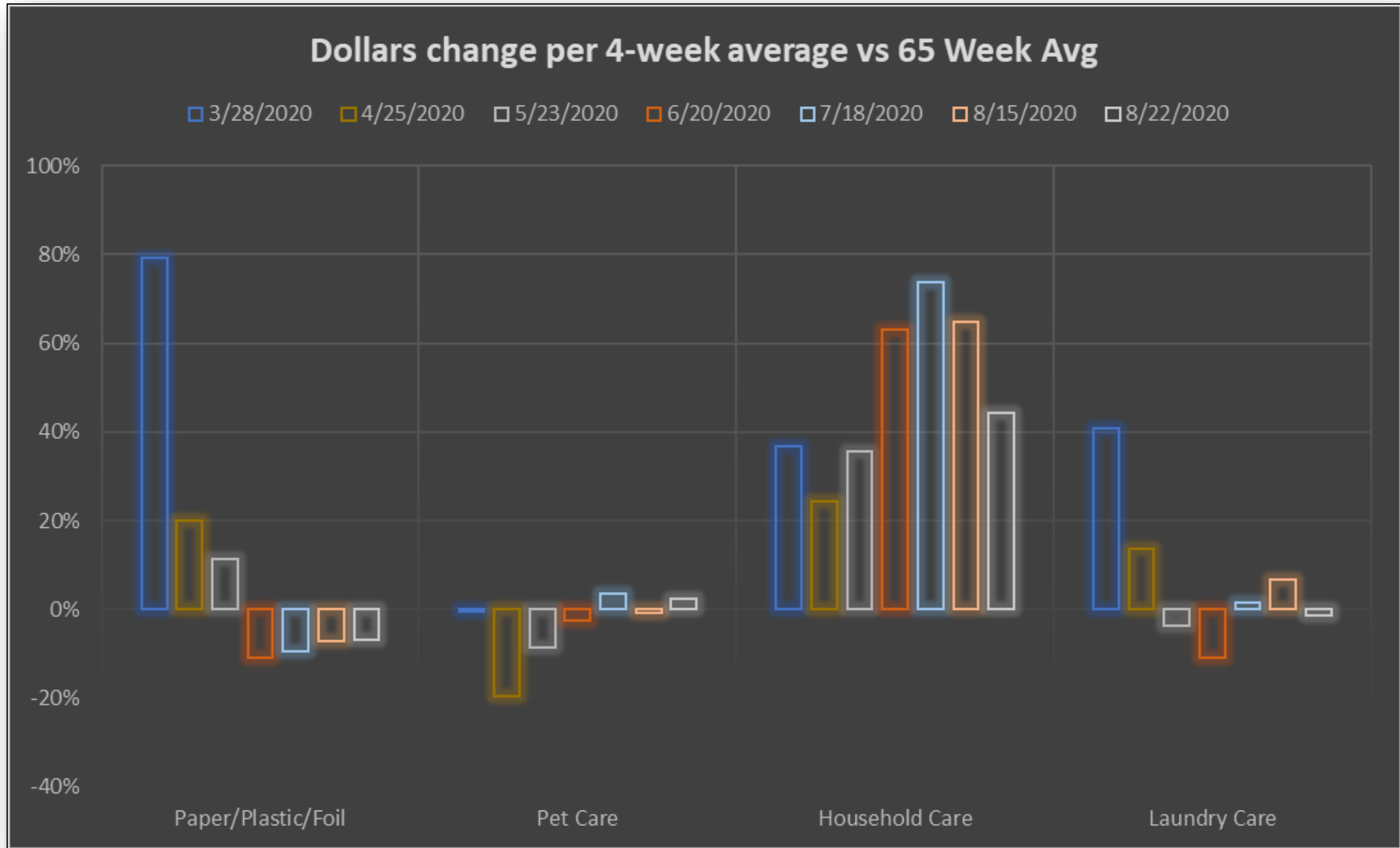
# Sub Category Performance – Alternative Snacks- Dollars

Dollars change per 4-week average vs 65 Week Avg

3/28/2020 4/25/2020 5/23/2020 6/20/2020 7/18/2020 8/15/2020 8/22/2020



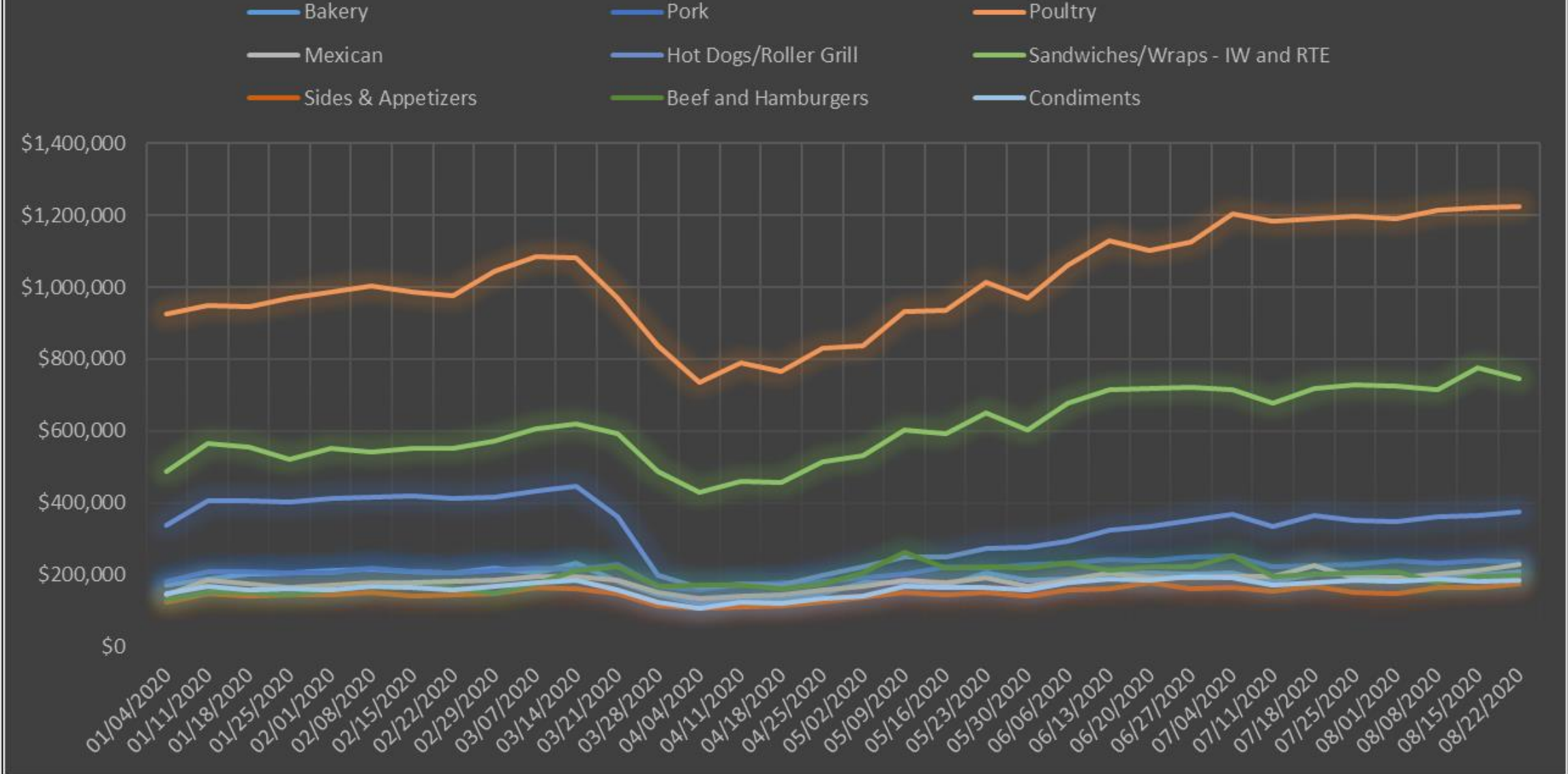
# Sub Category Performance – Non Edible Grocery





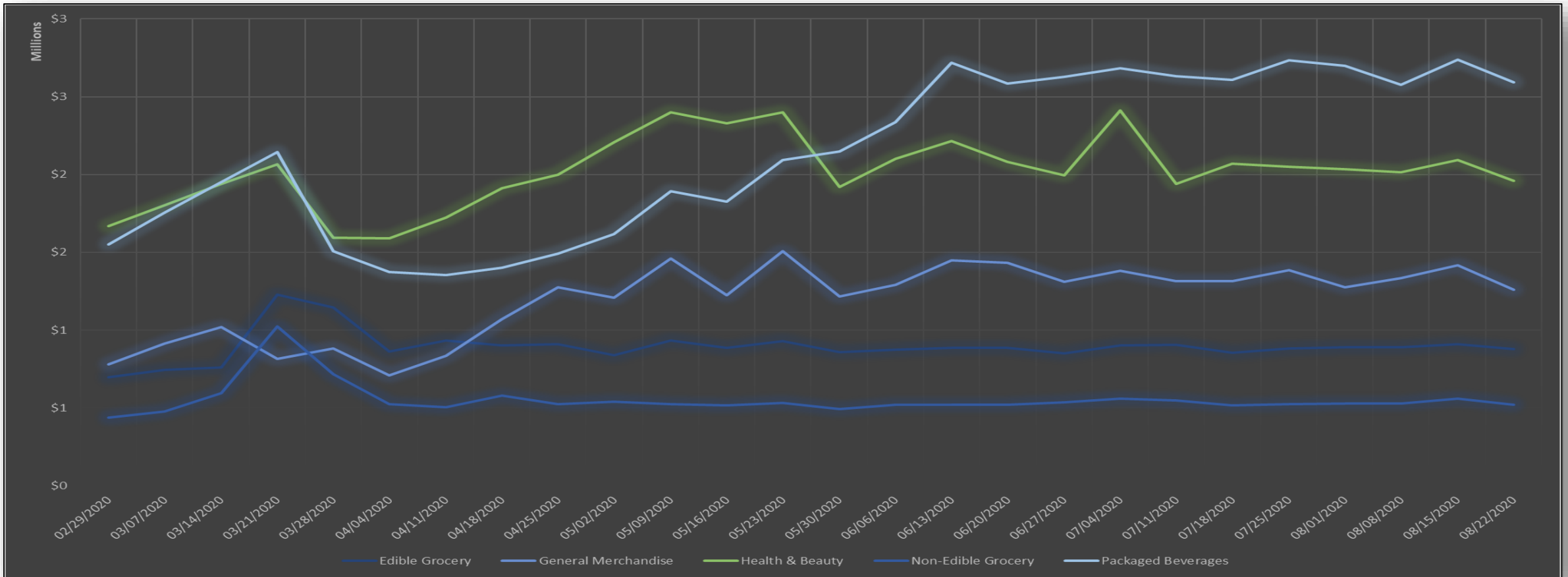
# Category Performance – Foodservice

## Dollar Trend - Average per Week



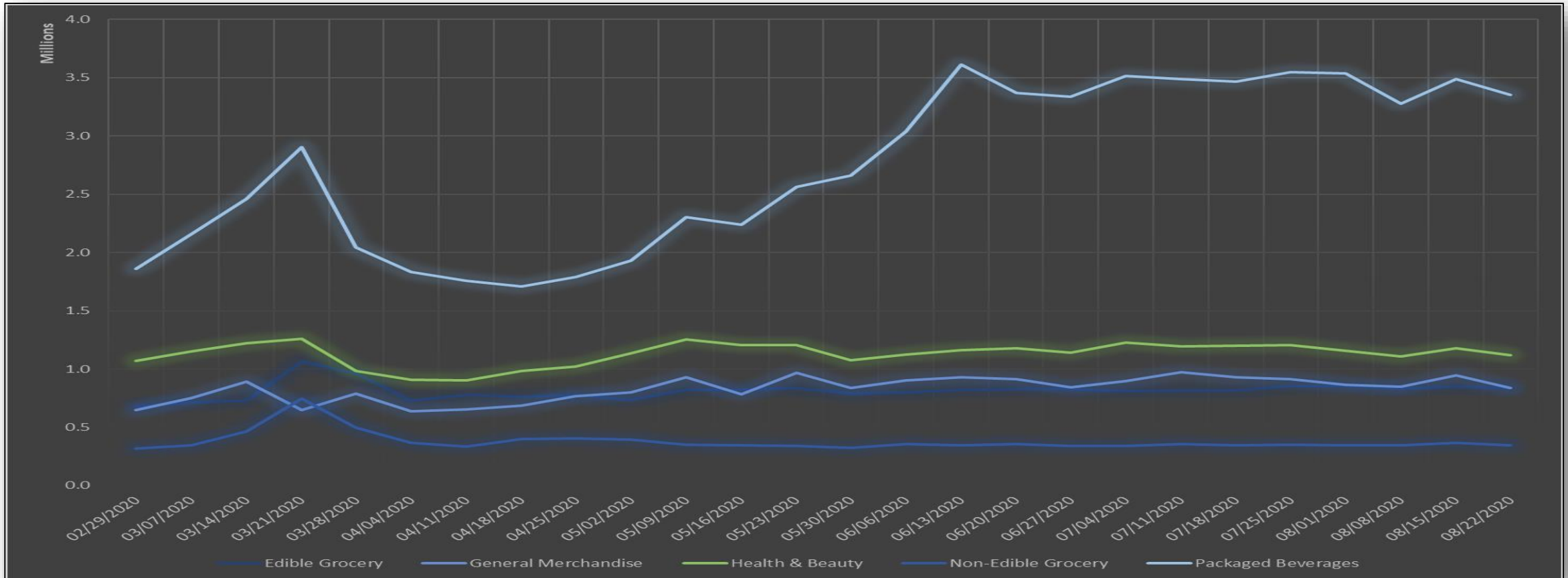
# Category Performance – Non Tobacco - Dollars

Category	65 WK AVG 2/29/20	4-week averages						8/22/20
		3/28/20	4/25/20	5/23/20	6/20/20	7/18/20	8/15/20	
Packaged Beverages	\$1.7M	Up 9%	Down -17%	Up 10%	Up 45%	Up 56%	Up 58%	Up 54%
Health & Beauty	\$1.9M	Down -1%	Down -4%	Up 24%	Up 10%	Up 12%	Up 7%	Up 5%
Edible Grocery	\$772K	Up 26%	Up 17%	Up 16%	Up 13%	Up 14%	Up 14%	Up 14%
General Merchandise	\$948K	Down -4%	Up 3%	Up 42%	Up 43%	Up 41%	Up 43%	Up 33%
Non-Edible Grocery	\$497K	Up 41%	Up 7%	Up 6%	Up 3%	Up 8%	Up 6%	Up 5%

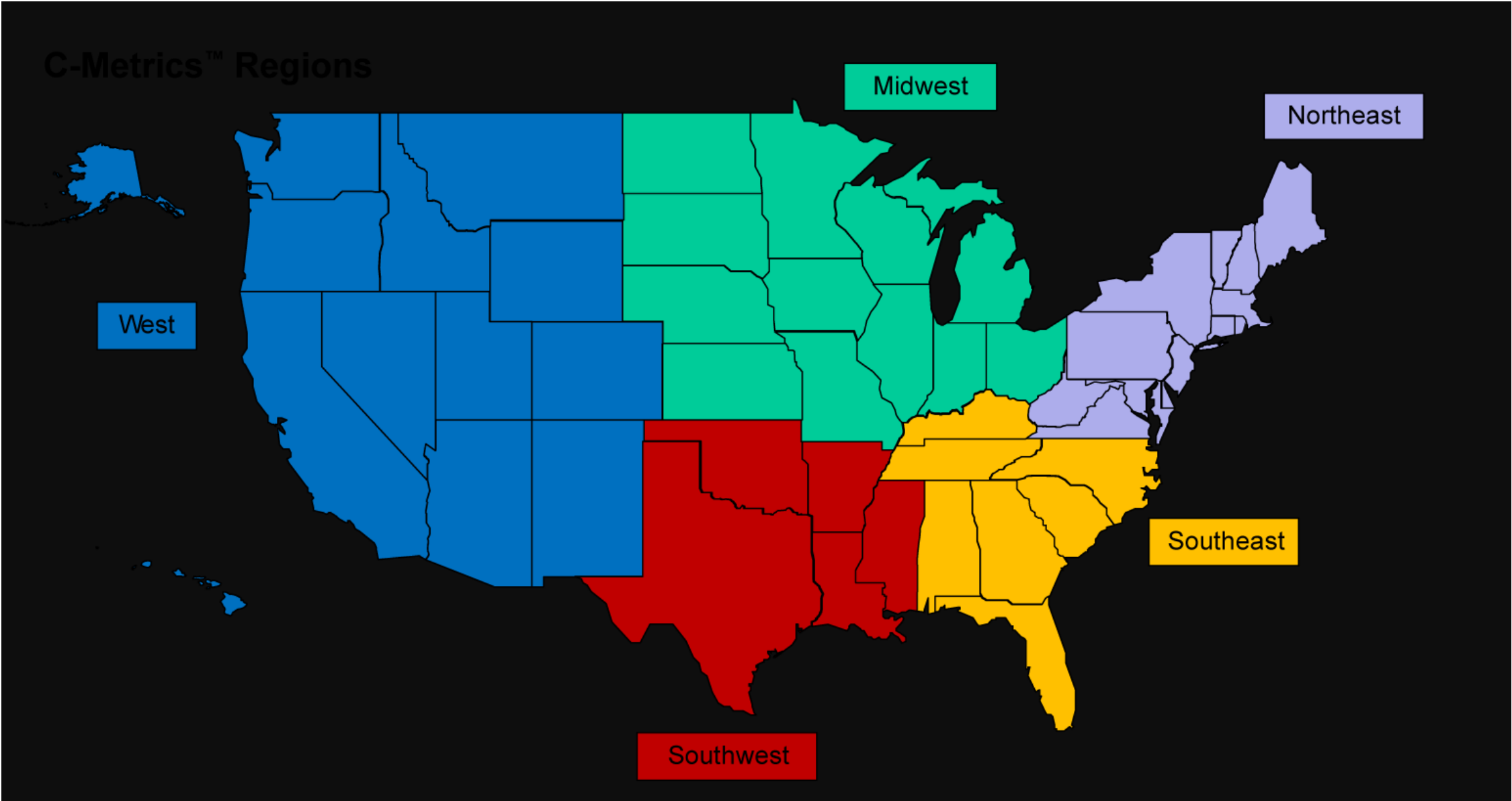


# Category Performance – Non-Tobacco - Units

Category	65 WK AVG 2/29/20	4-week averages						8/22/20
		3/28/20	4/25/20	5/23/20	6/20/20	7/18/20	8/15/20	
Packaged Beverages	2.1M	Up 11%	Down -18%	Up 4%	Up 47%	Up 60%	Up 59%	Up 55%
Health & Beauty	1.1M	Up 1%	Down -17%	Up 5%	Down 1%	Up 4%	EVEN	Down -2%
Edible Grocery	751K	Up 15%	Up 1%	Up 7%	Up 8%	Up 9%	Up 11%	Up 12%
General Merchandise	734K	Up 5%	Down -7%	Up 19%	Up 22%	Up 24%	Up 21%	Up 14%
Non-Edible Grocery	366K	Up 40%	Up 3%	Down -2%	Down -6%	Down -6%	Down -5%	Down -6%

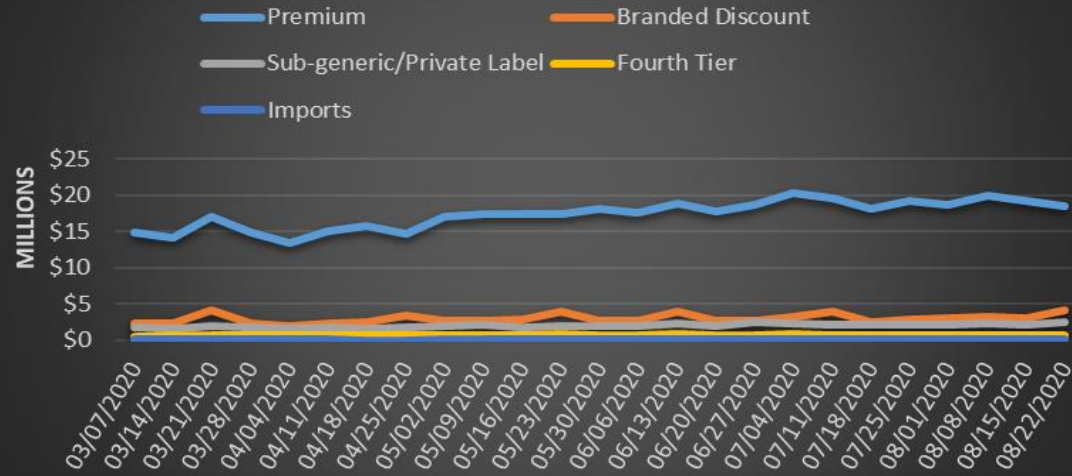


# Regional Performance

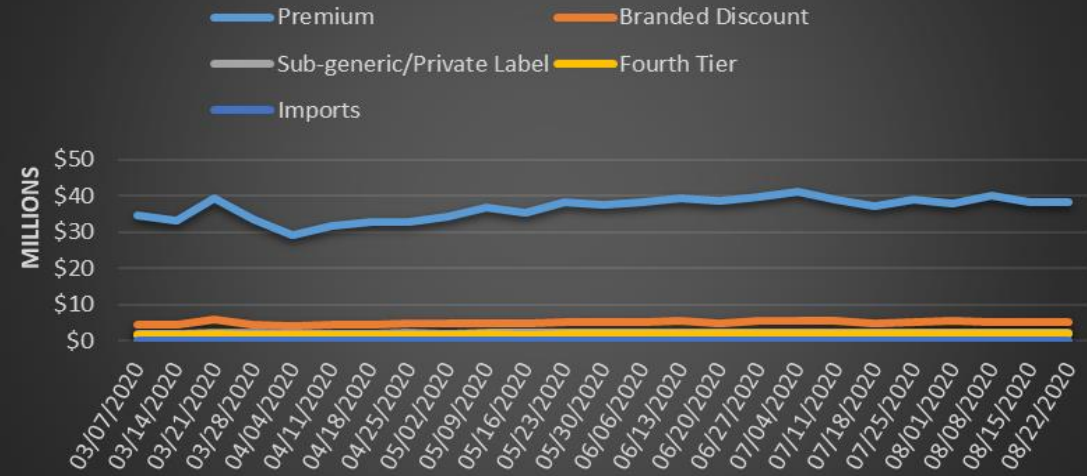


# Regional Performance - Cigarettes

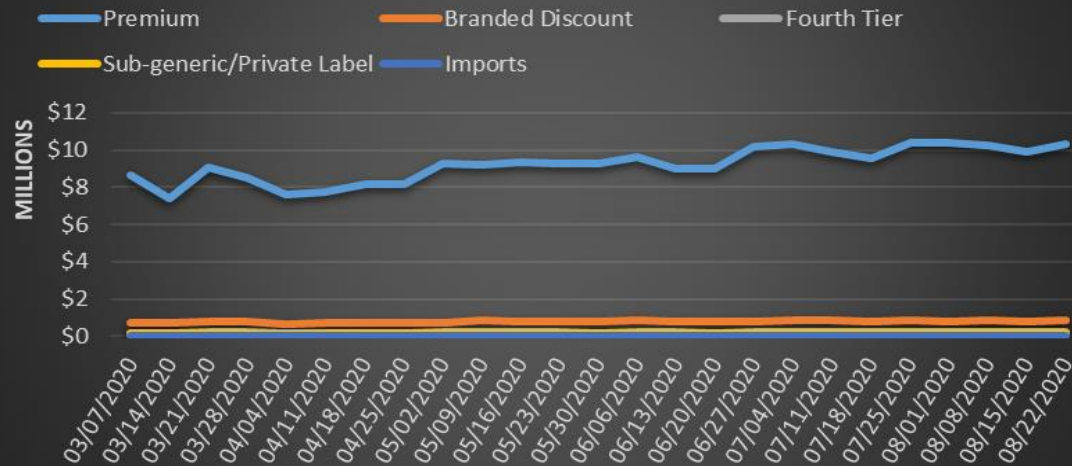
## Midwest



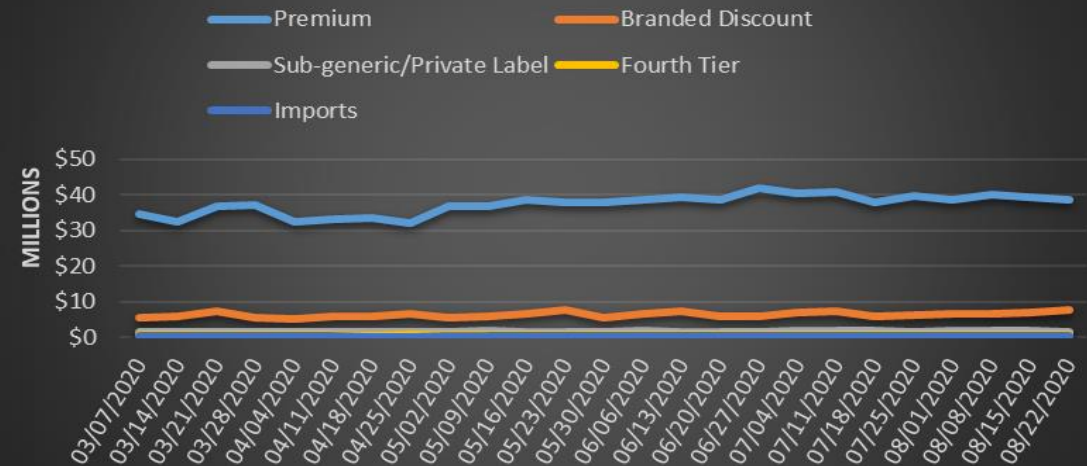
## Northeast



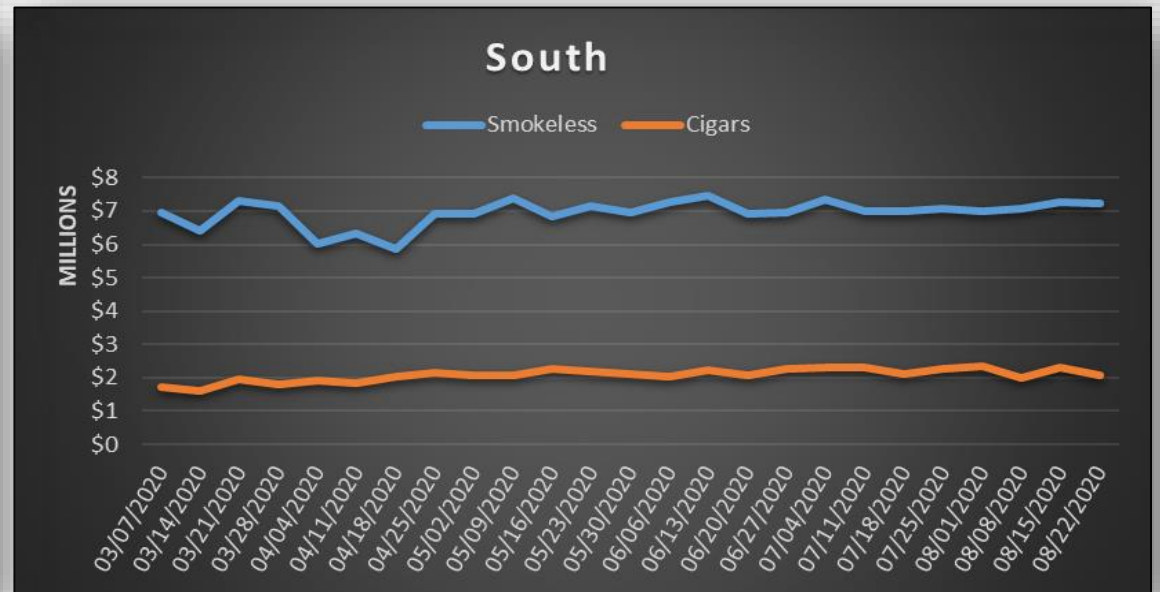
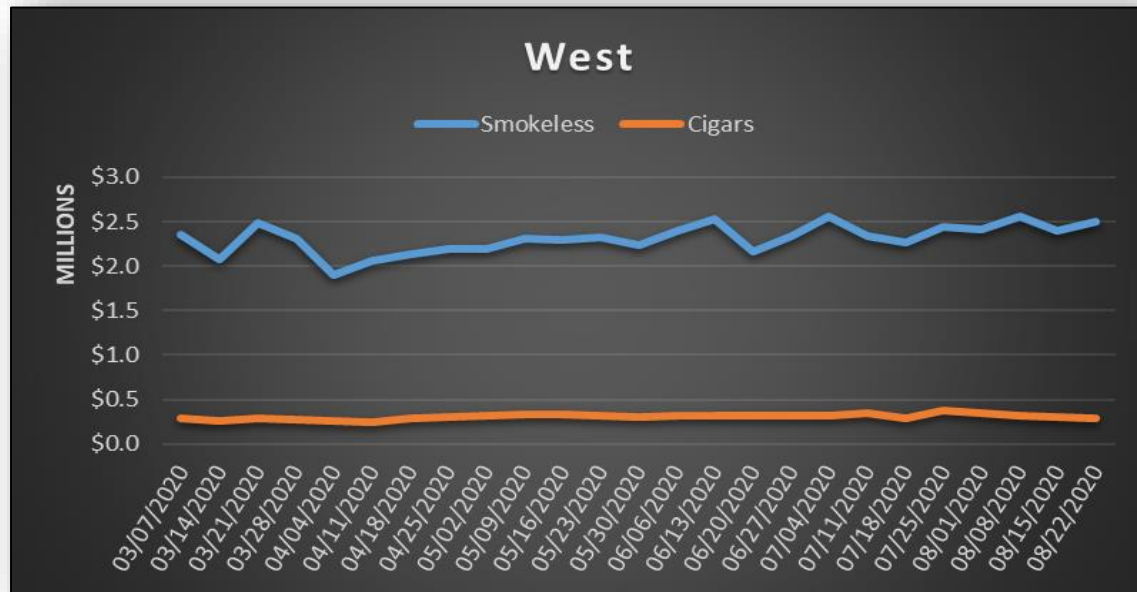
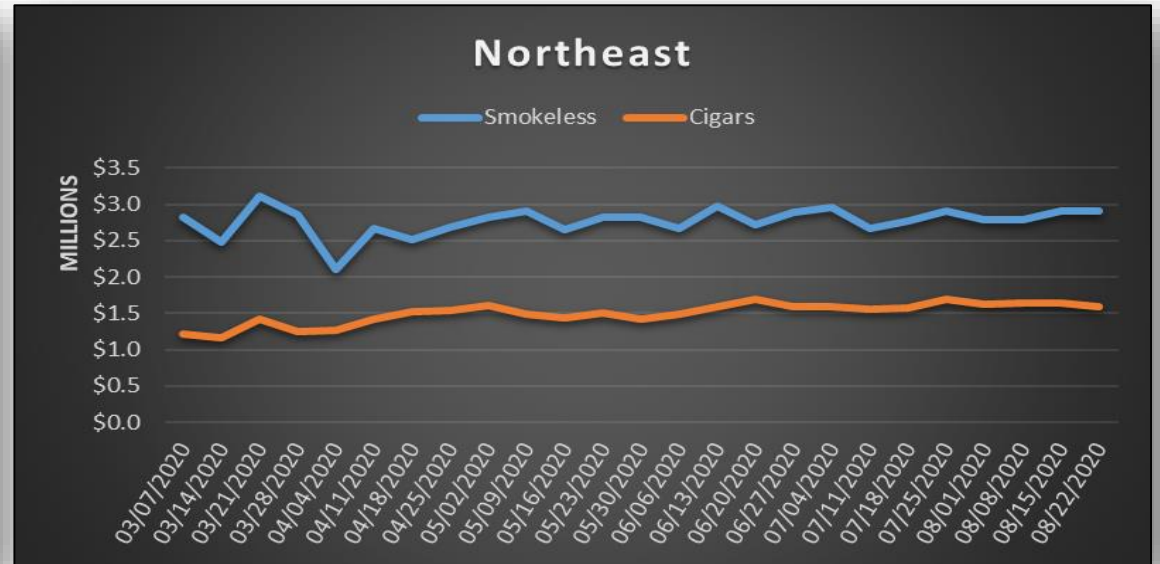
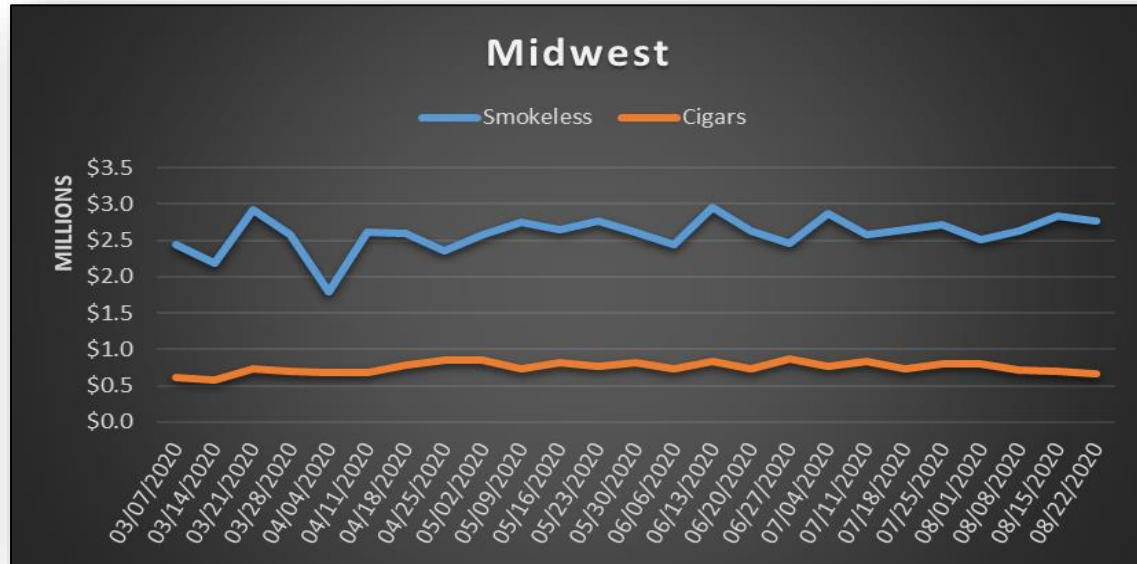
## West



## South

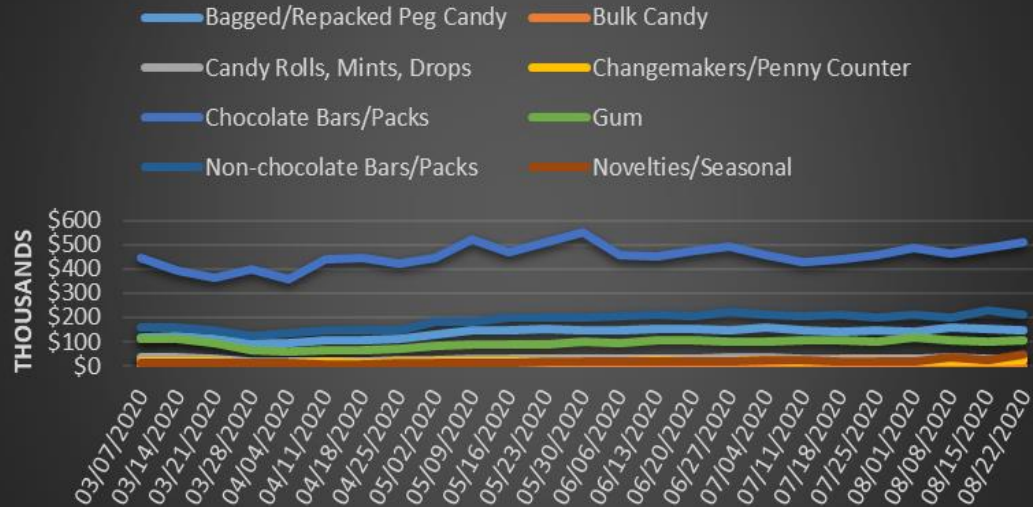


# Regional Performance – Smokeless & Cigars

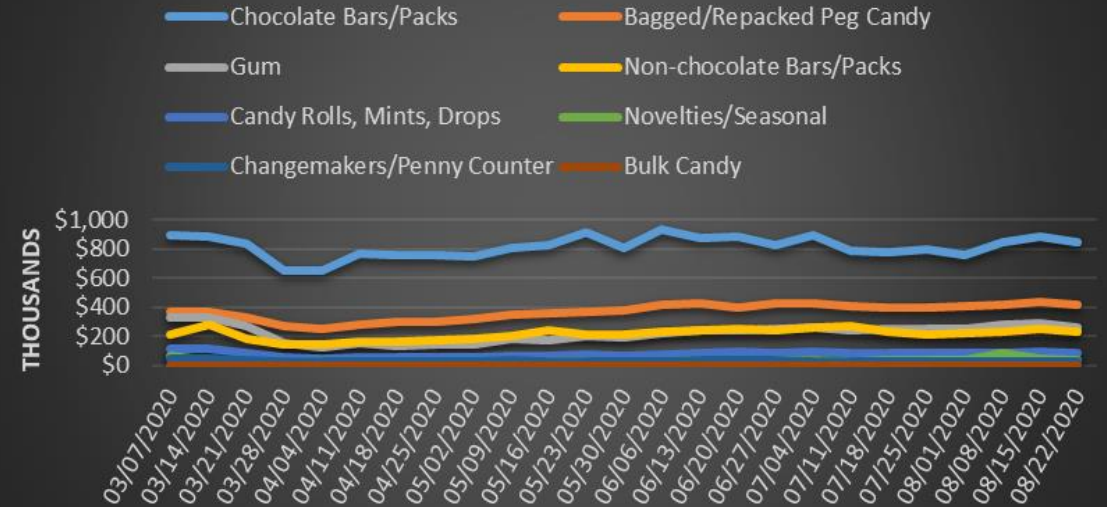


# Regional Performance - Candy

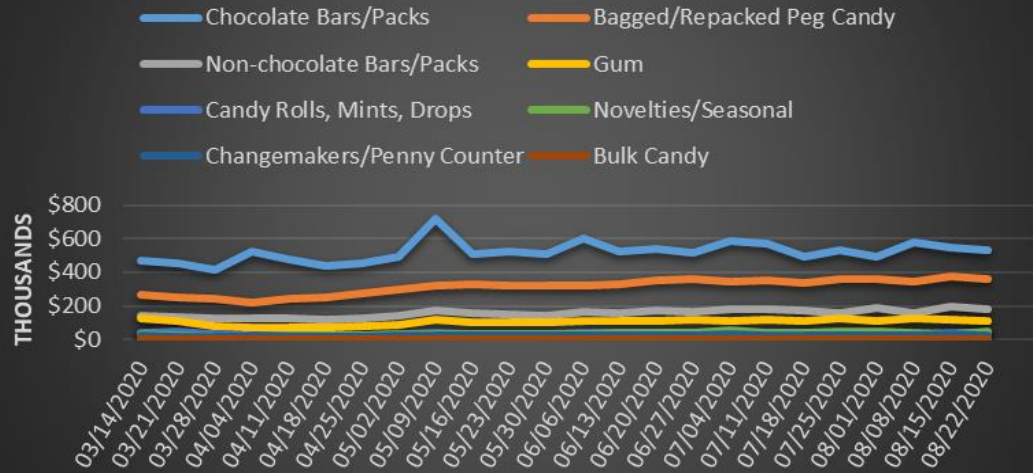
## Midwest



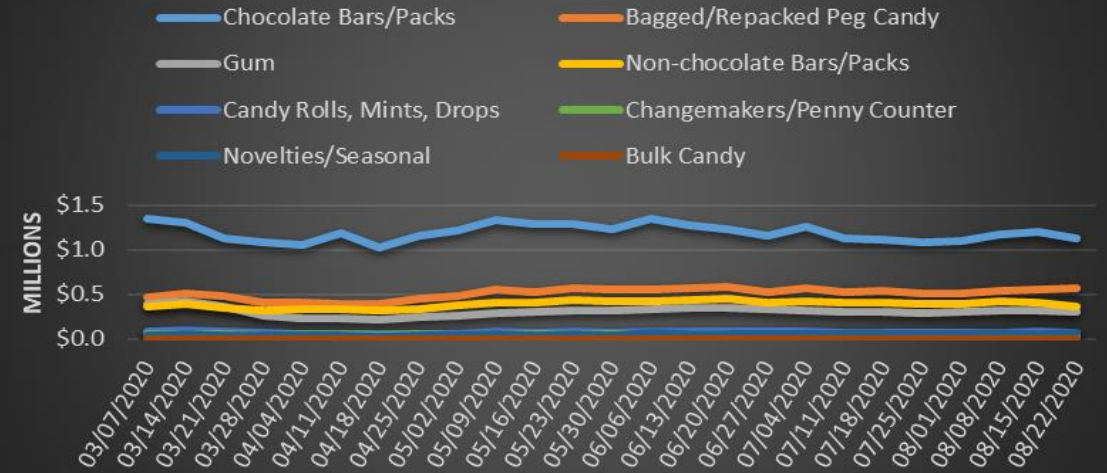
## Northeast



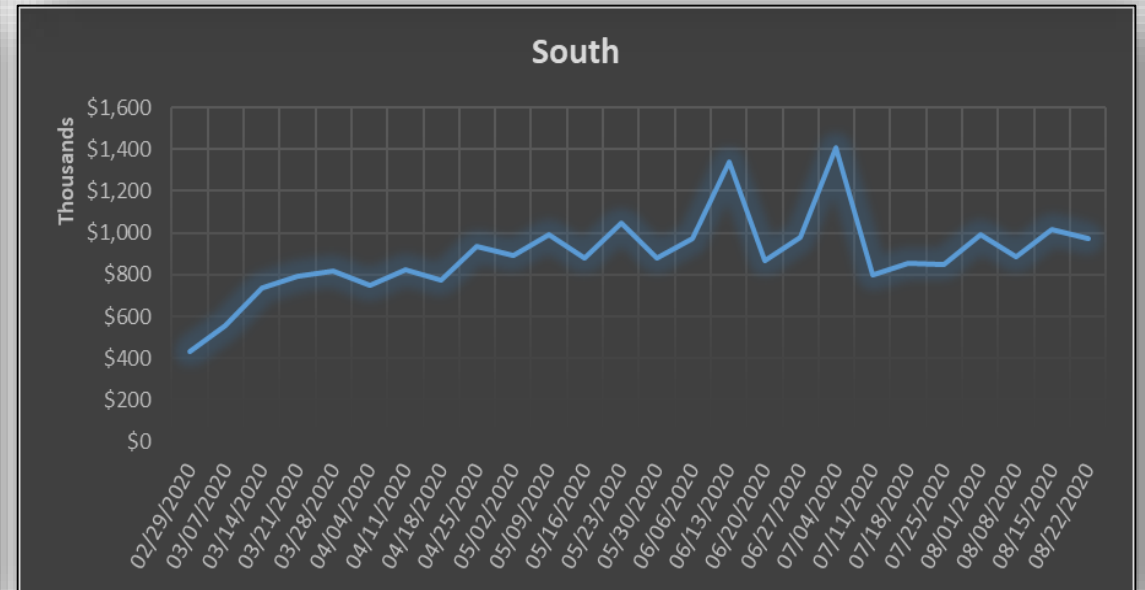
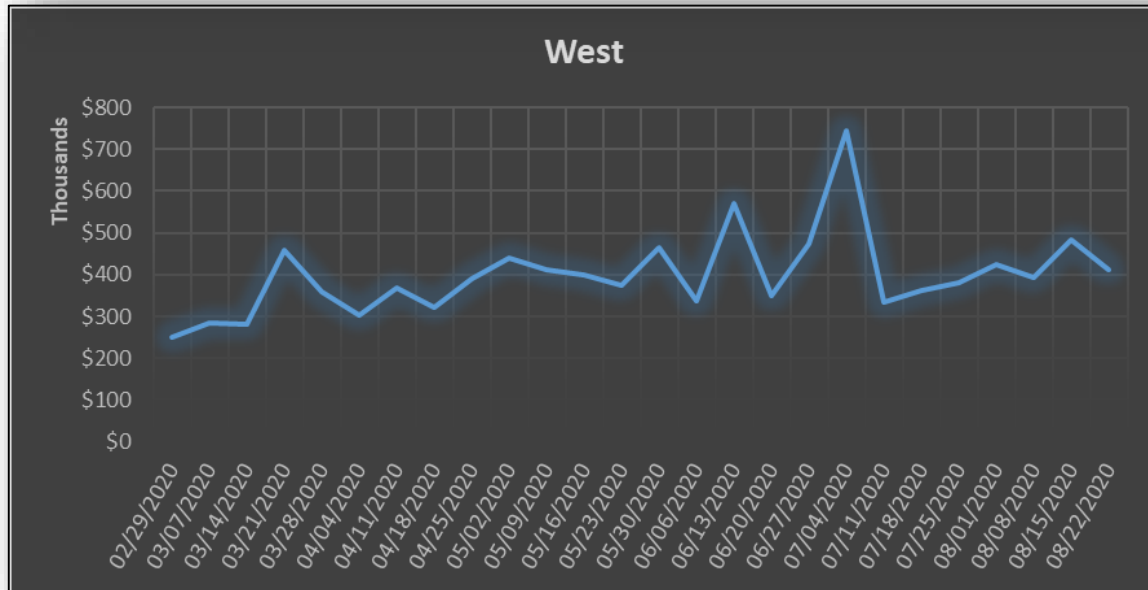
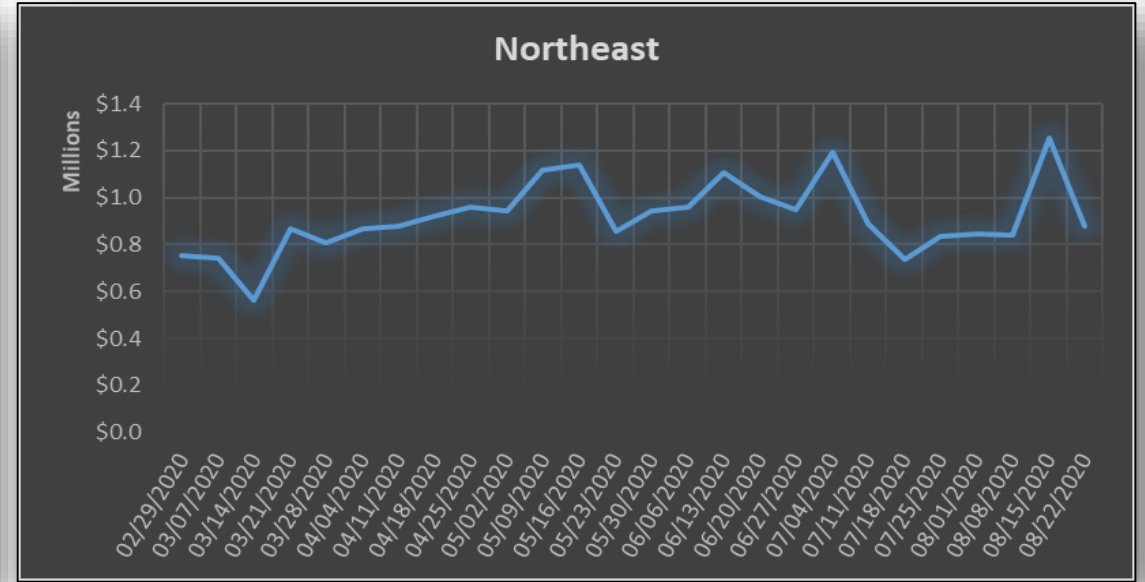
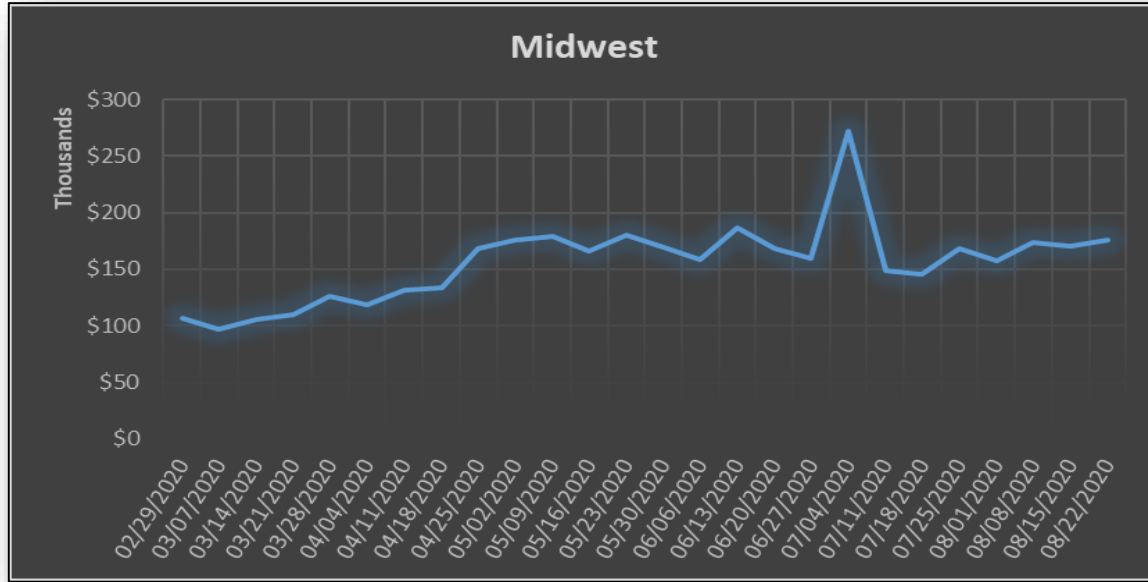
## West



## South



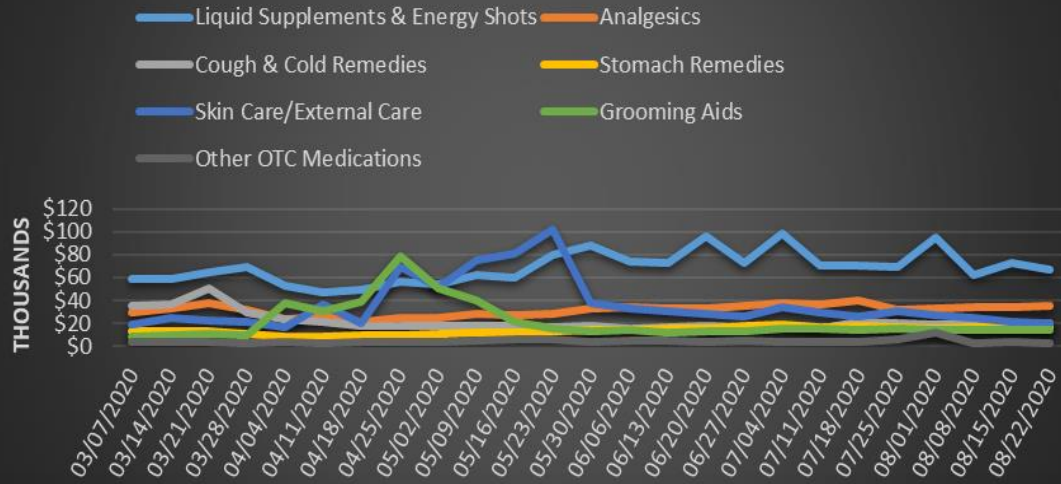
# Regional Performance - Vaping



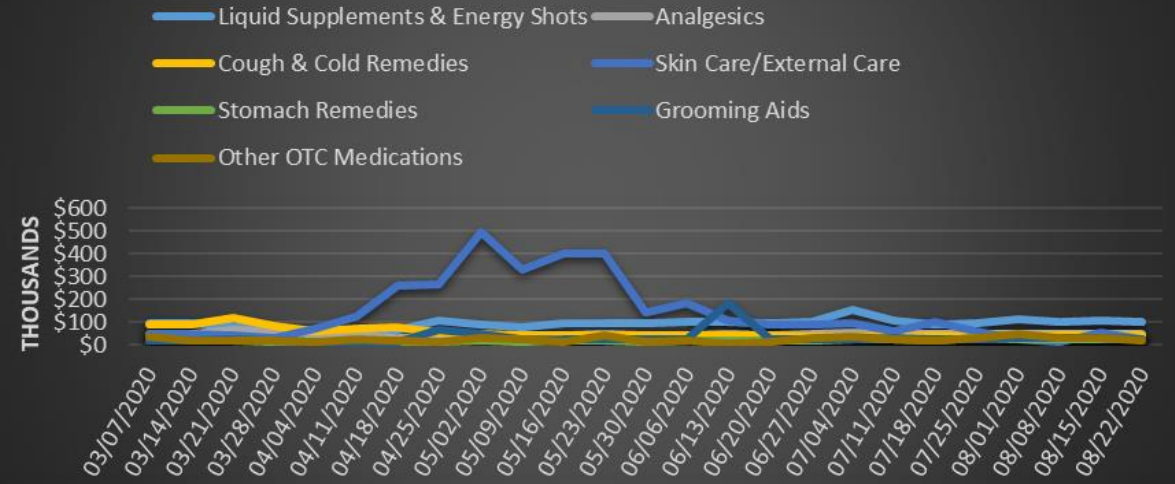


# Regional Performance – Health & Beauty

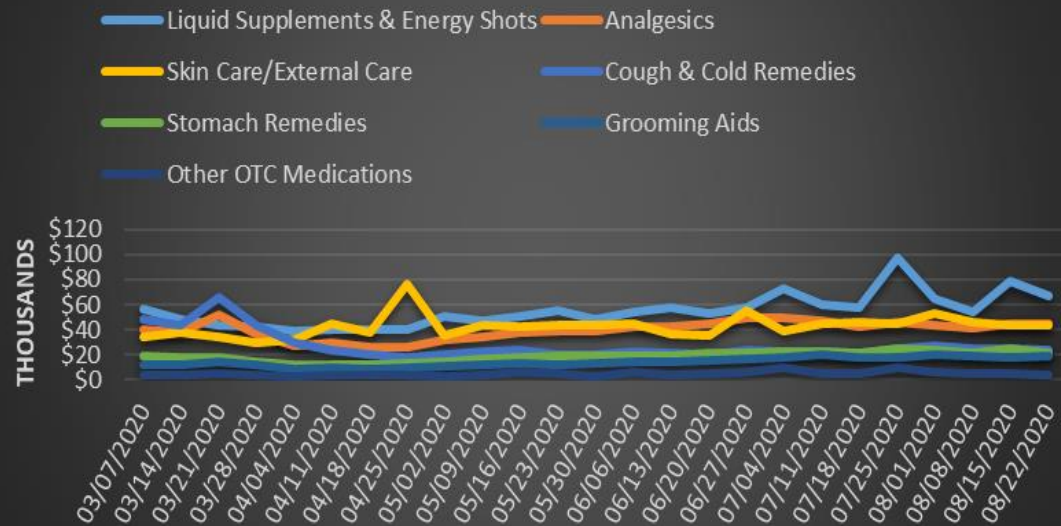
## Midwest



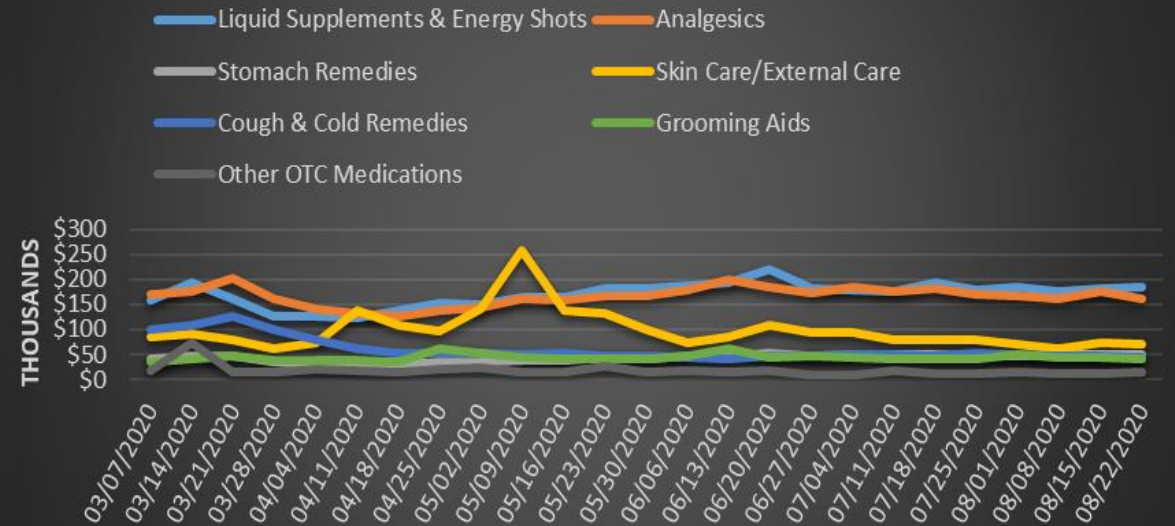
## Northeast



## West

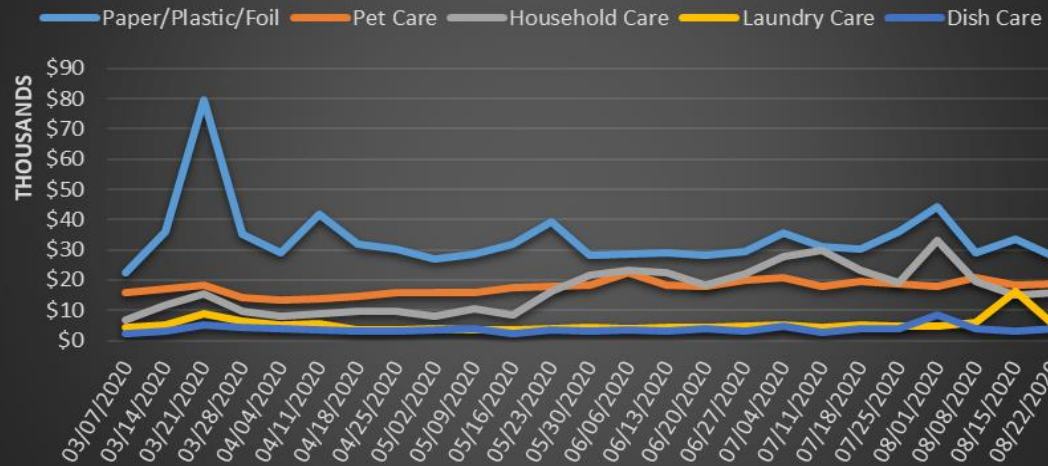


## South

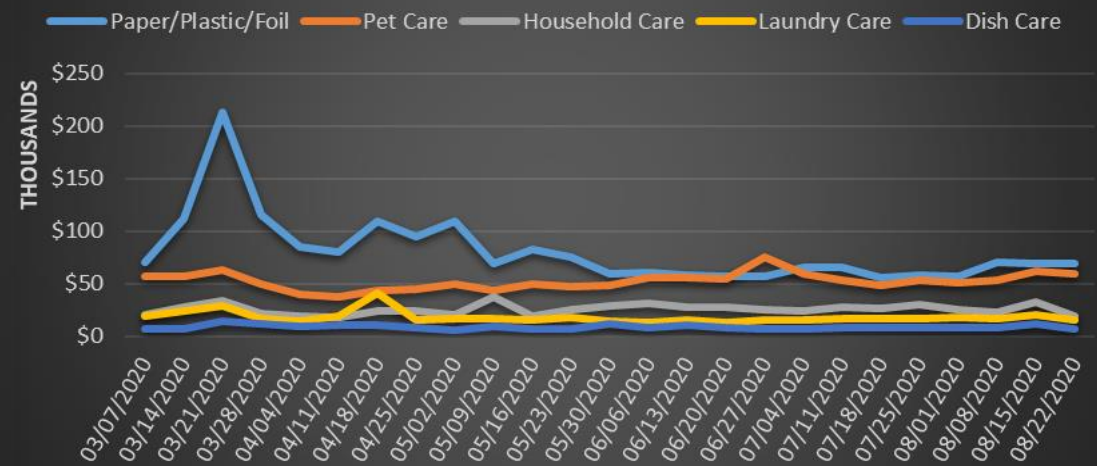


# Regional Performance – Non-Edible Grocery

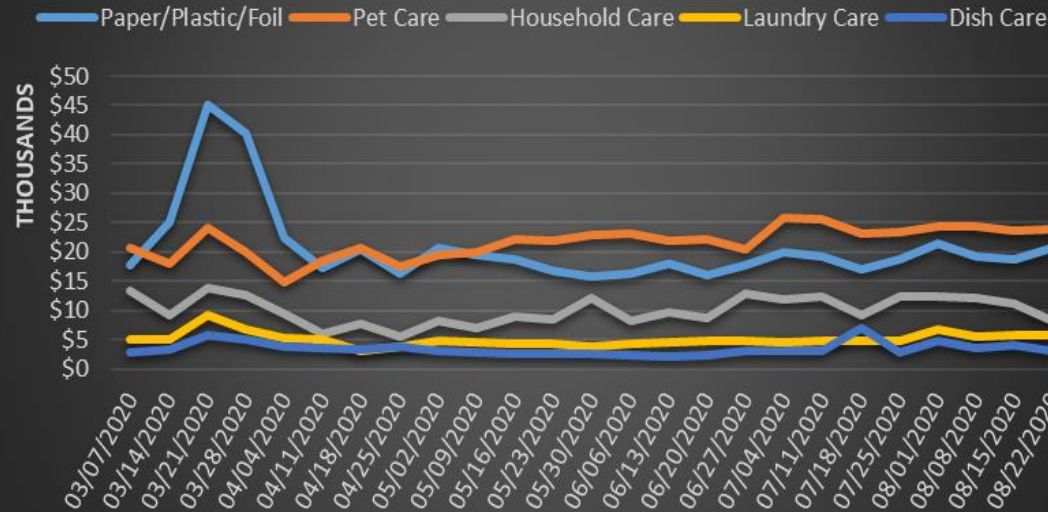
## Midwest



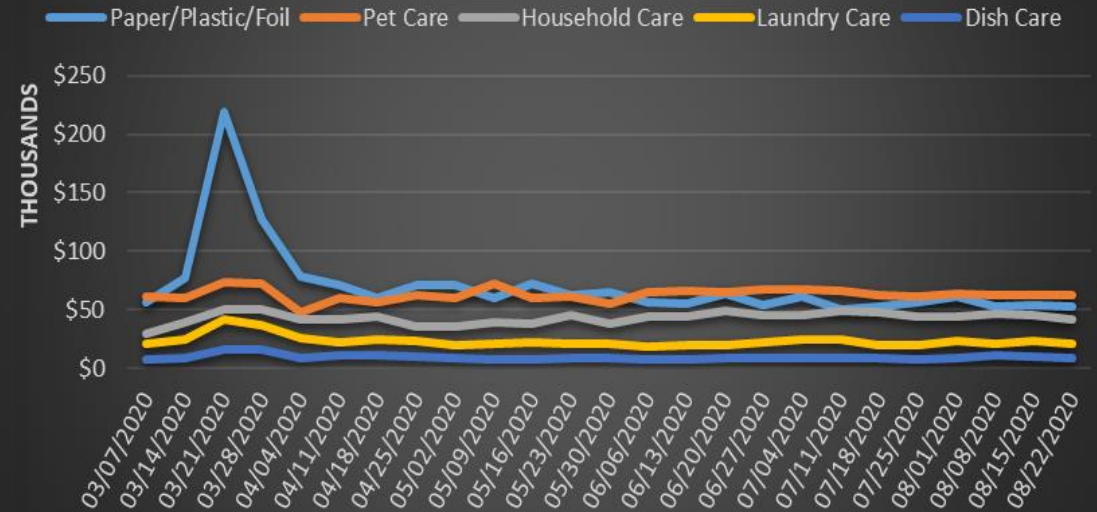
## Northeast



## West



## South



## Summary

- Dollar Performance (or Outperforming)
- Cigarette & OTP distribution
- Hot Beverages
- Foodservice units are down, but dollars up



**Thank You**

**CDBX Virtual – September 2020**

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