OPPORTUNITIES TO ATTRACT SNAP SHOPPERS
EXECUTIVE SUMMARY

As of December 2020, 43 million Americans (13% of the population) across 20.5 million households participated in the Supplemental Nutrition Assistance Program (SNAP), an increase of 20% from 2019. USDA expanded the SNAP Online Purchasing Pilot, and it is now available in 1.5 million households in 46 states and D.C. for consumers using SNAP benefits to purchase groceries online through participating retailers.

SNAP households purchased $74B, or 12% of Total Food & Beverage (sans produce, bakery, deli) in calendar year 2020, a dramatic increase from the $55B spent for the 52 weeks ended August 2020. Stimulus dollars, more SNAP participants, and prolonged access to SNAP benefits ensure that this population is important to CPG retail.

SNAP recipients can be of any age but are more likely to be single / divorced and skew toward larger households. While a majority of recipients are white, both Black and Hispanic over index as a percent of total population.

Food & Beverage Purchase Influencers

- Meal occasions account for 35% of SNAP recipient total CPG Food & Beverage spend, and there are categories within F&B where SNAP dollars capture a higher share of private label sales.
- Private label accounts for 17% of SNAP dollar sales, but more trips and higher spending illustrate SNAP shoppers’ preference for national brands, particularly in snack and beverage categories.
- As with total population, snacking takes place throughout the day. SNAP recipients allot 21% of their spend on snacks. Promoting convenience and multiple servings for less money will support these shoppers.
- While grocery is the top channel shopped for SNAP, recipients skew on shopping mass and dollar channels, often due to proximity and EDLP value. Online is gaining SNAP share as more retailers gain approval.

Attract and Retain SNAP

- Leverage IRI SNAP target groups to understand and embrace the increasing importance of these shoppers.
- Retailers and CPG should collaborate to educate SNAP recipients with financial and nutritional support materials.
- Online baskets of SNAP shoppers are more lucrative than those of non-SNAP shoppers. Retailers should encourage online shopping with list-building, promotions and online fee waivers and/or payment options.
- Promote cook-from-scratch and healthy affordable convenience meals (e.g., right mix of national and store brands).
- Promote EDLP strategies. As income decreases, so does the percent of dollars sold on promotion, suggesting these shoppers can’t wait for a sale.
COVID-19 Spurred Multiple Changes in SNAP Benefits

SNAP benefits increased throughout 2020, starting with an increase of $2B or 40% in spring 2020.

In December, Congress provided a 15% increase in SNAP benefits from January through June 2021. As part of the American Rescue Plan, President Biden called on Congress to extend the increase in SNAP benefits through September.

USDA expanded the SNAP Online Purchasing Pilot beyond the original eight states. Currently, more than 1.5 million households in 46 states and D.C. are using their SNAP benefits to purchase groceries online through participating retailers.

States may suspend ordinary time limits for eligibility (specifically for able-bodied adults without dependents).

SNAP benefits were boosted in 2020 under the Families First Coronavirus Response Act, but it excluded 37% of households already receiving the maximum SNAP benefits. USDA is working with the Department of Justice to increase the weekly value of SNAP benefits for these 12 million recipients.


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SNAP “Snapshot”

2020 SNAP Participation Up

SNAP Participants

43M

SNAP Participants as a % of the Total U.S. Population

13%

Increase of SNAP Participants from 2019

20%
SNAP Benefits Are Applied to Food Products, With the Exception of Prepared and Hot Foods, as Well as Beverage Alcohol

Any Food for the Household, Such As:
- Fruits, vegetables
- Meat, poultry, fish
- Dairy products
- Breads, cereals
- Other foods like snacks, non-alcoholic beverages
- Seeds and plants

Households CANNOT Use SNAP Benefits to Buy:
- Beer, wine, liquor, cigarettes, tobacco
- Vitamins, medicines, supplements
- Live animals (except shellfish, fish from water, etc.)
- Immediate-consumption prepared foods
- Hot foods
- Nonedible items like pet foods, cleaning supplies, paper products, other household supplies, hygiene items, cosmetics

Source: https://www.fns.usda.gov/snap/eligible-food-items
In the Past, SNAP Participation Generally Followed Unemployment Trends, But Recent Years Saw a Widened Gap

Unemployment peaked at 14.8% in 2020, but fell to 6.7% in November 2020. Unemployment will continue to decline, but levels of SNAP participation will remain elevated through 2021.
In Addition to Being Low Income and Across Generations, SNAP Shoppers Are More Likely to Be Single / Divorced and Living in Large Households With Children

**WHO IS THE SNAP SHOPPER?**

- **35%** Millennials (134 Index)
- **28%** Boomers (84 Index)

**Compared to % of Total Population**

- **67%** White (90 Index)
- **21%** Black (165 Index)
- **16%** Hispanic (128 Index)

- **31%** (388 Index) Have HH Income Less Than $15K
- **51%** (167 Index) Single or Divorced
- **36%** (125 Index) Live in Rural Areas
- **61%** (214 Index) Do Not Own a Home
- **19%** (171 Index) 5+ Person HHs

Source: IRI Consumer Network™ Total US – All Outlets, 26 WE12/27/20 / Demographics of the SNAP Shopper (Index vs. Non-SNAP HH)

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SNAP Dollars Increased Significantly During the Pandemic

A recent USDA study found that $1B in SNAP stimulus would lead to an increase of $1.5B in GDP, 54% above and beyond the new benefits.

• More SNAP participants in 2020
• SNAP eligibility periods have been extended
• Large percentage of stimulus dollars are spent on CPG products

SNAP $ SPEND

52 WE August 2020

52 WE December 2020

$55B

$74B

Source: IRI Consumer Network™, Total US – All Outlets, 26 WE 12/27/20
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SNAP Households Purchase $74B of Total Food & Beverage Annually, and Typically Shop More Frequently Across a Variety of Channels

SNAP Recipients Represent 12% of the total F&B Spend, and 13% of total U.S. population.

A SNAP Shopper on Average Makes 3% more trips* than total population.

SNAP Recipients Generate 12.4% of F&B Dollars: $74B

*Total F&B excludes Produce, Deli, Bakery / 52 WE 12/27/20

Source: IRI Consumer Network™, Total US – All Outlets, 26 WE 12/27/20 / *Total F&B excludes Produce, Deli, Bakery / 52 WE 12/27/20
Dollar Sales Among SNAP Buyers Increased Pre- vs. During COVID-19, Driven by a 20% Increase in Buyers and Larger Purchase Sizes

SNAP F&B
Nearly 60% of SNAP Shoppers Spend the Same Amount of Time Shopping as Before COVID-19

CPG Retail Must Continue to Ensure Shopper Safety and Increase Ease of Shopping

SNAP Recipients Who Spent 30 Minutes on Their Last Regular Trip for Groceries In-Store: 28%

SNAP Recipients Who Spent More Than One Hour on Their Last Regular Trip for Groceries In-Store: 6%

Meal Occasions Represent 35% of SNAP Recipient Total CPG F&B Spend, While Beverage and Snacks Represent 42% of Their Spend

<table>
<thead>
<tr>
<th>% of Spend</th>
<th>Category</th>
<th>Items</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>21%</strong></td>
<td>SNACKS</td>
<td>Bakery Snacks, Dried Meat Snacks, Non-Chocolate Candy, Dry Fruit Snacks, Appetizers / Snack Rolls FZ, Shelf Stable Dip / Dip Mixes</td>
</tr>
<tr>
<td><strong>5%</strong></td>
<td>BAKING</td>
<td>Gelatin / Pudding PRD and Mixes, Frosting, Evaporated / Condensed Milk, Dessert Toppings – SS, Sugar, Marshmallows</td>
</tr>
<tr>
<td><strong>4%</strong></td>
<td>LUNCH</td>
<td>Refrigerated Lunches</td>
</tr>
<tr>
<td><strong>8%</strong></td>
<td>BEVERAGE</td>
<td>Spirits / Liquor</td>
</tr>
<tr>
<td><strong>1%</strong></td>
<td>DESSERTS</td>
<td>Refrigerated Cheesecakes</td>
</tr>
<tr>
<td><strong>7%</strong></td>
<td>BREAKFAST</td>
<td>Pastry / Doughnuts, Toaster Pastries / Tarts, Breakfast Food – FZ</td>
</tr>
<tr>
<td><strong>21%</strong></td>
<td>BEVERAGE</td>
<td>Energy Drinks, Tea / Coffee – RTD, Coffee Creamer – SS, Carbonated Beverages</td>
</tr>
<tr>
<td></td>
<td><strong>2%</strong></td>
<td>BABY</td>
</tr>
</tbody>
</table>

Source: IRI Consumer Network™, Total US – All Outlets, 26 WE 12/27/2020; Total Food & Beverage - Dollar Share Index - SNAP HH’s vs. Non-SNAP HH’s

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Many Top-Ranking SNAP Categories Revolve Around Convenience, Caffeine and Feeding More for Less, Addressing Some of Snap Recipients’ Challenges
SNAP Shoppers Are Important to National Brands

Evidenced Not Only by Total Share, But Also Share of Specific National Brand Products

<table>
<thead>
<tr>
<th>National Brands</th>
<th>Private Label</th>
</tr>
</thead>
</table>

% Share of Dollar Sales by Eating Occasion, National Brands vs. Private Label

<table>
<thead>
<tr>
<th>Eating Occasion</th>
<th>National Brands</th>
<th>Private Label</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beverage</td>
<td>84%</td>
<td>16%</td>
</tr>
<tr>
<td>Snacks</td>
<td>91%</td>
<td>9%</td>
</tr>
<tr>
<td>Dinner</td>
<td>78%</td>
<td>22%</td>
</tr>
<tr>
<td>Breakfast</td>
<td>80%</td>
<td>20%</td>
</tr>
<tr>
<td>Lunch</td>
<td>72%</td>
<td>28%</td>
</tr>
<tr>
<td>Baking</td>
<td>68%</td>
<td>32%</td>
</tr>
</tbody>
</table>

SNAP Households’ Dollar Share of National Brands’ Total Sales

<table>
<thead>
<tr>
<th>Item</th>
<th>National Brands</th>
<th>Private Label</th>
</tr>
</thead>
<tbody>
<tr>
<td>Energy Drink – 64%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Iced Coffee – 49%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Soft Drink – 34%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fruit Drink Mix – 28%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bottled Water – 26%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Non-Chocolate Chewy Candy – 38%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dried Meat Snack – 26%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rtf. Yogurt – 24%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tortilla Chips – 23%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fruit Rolls / Snacks – 23%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Frozen Handheld Sandwich – 28%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shelf-Stable Microwaveable Dinner – 27%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shelf-Stable Meat – 25%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Frankfurter – 25%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Frozen Dinner / Entree – 24%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Frozen Breakfast Handheld – 32%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pastry / Danish – 28%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Muffin – 27%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ready-to-Eat Cereal – 24%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Frozen Breakfast Entree – 23%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Refrigerated Meat / Cheese / Cracker / Dessert – 30%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sliced Lunchmeat – 29%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ready-to-Serve Wet Soup – 27%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dry Soup – 22%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ramen – 22%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spice / Seasoning (no salt / pepper) – 29%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Evaporated / Condensed Milk – 22%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prepared Gelatin – 20%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cooking and Salad Oil – 19%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hominy Grits – 18%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Total Food & Beverage excludes Produce, Deli and Bakery

Source: IRI Consumer Network™, Total US – All Outlets, 26 WE 12/27/2020 (top), All Outlets, 52 Weeks Ending 12-27-2020 (bottom)

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Although Private Label Is 17% of Dollar Sales, More Trips and Higher Spending Show Preference by SNAP Shoppers for National Brands

- 17% of dollar sales for SNAP shoppers is attributed to Private Label, similar to 18% for non-SNAP shoppers
- 2.7X more trips per buyer made by SNAP shoppers for National Brands spending vs. Private Label
- 4.9X dollars per buyer spent by SNAP shoppers on National Brands vs. Private Label

Source: IRI Consumer Network™, Total US – All Outlets, 26 WE 12/27/2020 – Total Food and Beverage Share of Sales
However, in Select Categories, SNAP Dollars Capture an Even Higher Share of Private Label Sales

Private Label vs. National Brand Purchases Are Driven by Availability and/or Preference

Categories where PRIVATE LABEL Is Getting More Than 17% Share Are Within

- Baking
- Breakfast
- Dessert
- Lunch
- Dinner

Categories where NATIONAL BRANDS Are Getting More Than Their “Fair Share”

- Baby
- Snacks
- Beverage
- Liquor

Source: IRI Consumer Network™, Total US – All Outlets, 26 WE 12/27/2020 – Index of % Dollar Sales by Eating Occasion – vs. SNAP Total F&B / *Total F&B excludes Produce, Deli and Bakery

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Some SNAP Recipients Plan to Change Their Behavior in 2021 in Response to the Pandemic

SNAP Recipients Who Plan to Cook From Scratch More Often in 2021 26% 161 Index

SNAP Recipients Who Plan to Bake Treats More Often in 2021 23% 164 Index

Source: IRI Weekly Surveys among IRI Consumer Network™ Panel representing Total U.S. Primary Grocery Shoppers – Wave 24 (1/8-1/10, 2021) / Index to All Respondents
37% Said They Will Wait More Than Four Weeks Before Returning to Dine Out at a Restaurant

39% Plan to Dine Out Less Often in 2021

Therefore, retailers need to target messages about available meal solutions in the store that do not take long to prepare.

Source: IRI Weekly Surveys among IRI Consumer Network™ Panel representing Total U.S. Primary Grocery Shoppers – Wave 24 (1/8-1/10)
Income Concerns May Impact How SNAP Shoppers Spend

56% of SNAP recipients state they are putting planned purchases on hold and are reining in regular spending as best they can.

51% of SNAP recipients state they are having difficulty affording needed groceries.

Source: IRI Weekly Surveys among IRI Consumer Network™ Panel representing Total U.S. Primary Grocery Shoppers – Wave 24 (1/8-1/10)
Overall SNAP Shoppers Spend Slightly Differently Across the Month, But Spending Varies by State

SNAP Benefits Vary by State:

- In 36 states and Washington, D.C., benefits are issued within the first two weeks of the month
- In 15 states, benefits are issued over a longer period of three weeks

% of SNAP Monthly Dollar Spend – Average Month

- **WASHINGTON**
  - 1st Half of Month: 53%
  - 2nd Half of Month: 47%
  (benefits in first 9 days)

- **FLORIDA**
  - 1st Half of Month: 48%
  - 2nd Half of Month: 52%
  (benefits in first 10 days)

Source: IRI Consumer Network™, Total US – All Outlets, 26 WE 12/27/2020
Spending by Category Also Varies Across the Month

% of SNAP Monthly Dollar Spend – Average Month / Total U.S. – All Outlets

- **Food & Beverage**
  - 1st Half of Month: 49%
  - 2nd Half of Month: 52%

- **Baking**
  - 1st Half of Month: 52%
  - 2nd Half of Month: 49%

- **Beverage**
  - 1st Half of Month: 48%
  - 2nd Half of Month: 51%

- **Breakfast**
  - 1st Half of Month: 54%
  - 2nd Half of Month: 48%

- **Desserts**
  - 1st Half of Month: 46%
  - 2nd Half of Month: 52%

- **Dinner**
  - 1st Half of Month: 51%
  - 2nd Half of Month: 47%

- **Beverage Alcohol**
  - 1st Half of Month: 49%
  - 2nd Half of Month: 53%

- **Lunch**
  - 1st Half of Month: 50%
  - 2nd Half of Month: 50%

- **Snacks**
  - 1st Half of Month: 51%
  - 2nd Half of Month: 50%

Source: IRI Consumer Network™, Total US – All Outlets, 26 WE 12/27/2020 / *Cannot use SNAP dollars for Beverage Alcohol

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At a High Level, SNAP Shoppers Are Not as Deal-Driven Since They Do Not Purchase on Promotion as Often

The Dollars SNAP Shoppers Spend on Promoted Products Under Index Across Some Channels, With the Dollar Channel a Notable Exception

Dollar Sales on Promotion Dollar Index (Including Manufacturer Coupons)

<table>
<thead>
<tr>
<th></th>
<th>Total U.S. SNAP Shopper vs. Non-SNAP Shopper</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supermarket</td>
<td>74 Index</td>
</tr>
<tr>
<td>Mass</td>
<td>84 Index</td>
</tr>
<tr>
<td>Drug</td>
<td>91 Index</td>
</tr>
<tr>
<td>Dollar</td>
<td>82 Index</td>
</tr>
<tr>
<td>Total U.S. Grocery</td>
<td>115 Index</td>
</tr>
<tr>
<td>Select Mass</td>
<td></td>
</tr>
<tr>
<td>Total U.S. Drug</td>
<td></td>
</tr>
<tr>
<td>Total U.S. Dollar</td>
<td></td>
</tr>
</tbody>
</table>

Source: IRI Consumer Network™. Total US – All Outlets, 26 WE 12/27/2020 - Dollar Sales on Promotion Dollar Index* vs. Non-SNAP
As Income Decreases, So Does the Percentage of Dollars Sold on Promotion, Suggesting Lower Income Households Buy on Need and Can’t Wait for a Sale

% of Dollar Sales on Promotion / Total Food & Beverage / Total U.S. – All Outlets

Source: IRI Consumer Network™, Total US – All Outlets, 26 WE 12/27/2020
SNAP Purchases Represent 28% of Dollar and 17% of Mass Dollar Sales, Making Lowest Price Value the Chief Quest for SNAP Shoppers

SNAP Household Dollar Share of Channel (Indexed to All Outlet Average)

<table>
<thead>
<tr>
<th>Channel</th>
<th>Index 120+ (Skew Toward)</th>
<th>Index 80 – 120 (Average)</th>
<th>Index &lt; 80 (Skew Away)</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Outlet</td>
<td>12.5</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dollar</td>
<td>28.1</td>
<td>225 Index</td>
<td></td>
</tr>
<tr>
<td>Mass/Supercenter*</td>
<td>16.5</td>
<td>133 Index</td>
<td></td>
</tr>
<tr>
<td>Drug</td>
<td>14.7</td>
<td>118 Index</td>
<td></td>
</tr>
<tr>
<td>GroceryX**</td>
<td>10.6</td>
<td>85 Index</td>
<td></td>
</tr>
<tr>
<td>Club</td>
<td>8.1</td>
<td>65 Index</td>
<td></td>
</tr>
</tbody>
</table>

*Total Food & Beverage excludes Produce, Deli and Bakery / *Walmart included in Channel Aggregate / **GroceryX excludes Walmart

Source: IRI Consumer Network™, Total US – All Outlets, 26 WE 12/27/2020
Dollar Channel’s Success With SNAP Shoppers Can Be Tied to the Type of Promotions Offered Before Shoppers Get to the Store, Such as Weekly $5 Off Deals
The Dollar Channel Caters to SNAP Recipients by Providing Better-for-You and Budget-Minded Recipe Ideas

This Is an Opportunity Other Channels Should Adopt

Source: www.dollargeneral.com
SNAP Households Followed the Trend of Increased Online Purchasing During COVID-19

% Households Purchasing Food & Beverage on the Internet / Total U.S.


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COVID-19 Accelerated the SNAP Online Purchasing Pilot, With 46 States and the District of Columbia Participating

Source: https://www.fns.usda.gov/snap/online-purchasing-pilot _ as of 01/26/2021

ALDI, Amazon and Walmart
Amazon and Walmart
ALDI and Amazon
ALDI, Amazon, ShopRite, Walmart
ALDI, Amazon, Walmart, Wright's Market
ALDI, Amazon, Walmart, Woods
ALDI, Amazon, Walmart, HEB
ALDI, Amazon, Carlie C’s, Walmart
Amazon, Fresh Grocer, ShopRite, Walmart
Walmart
Approved, Not Live
No Participation
Online Baskets Among SNAP Households Are More Lucrative Than Baskets of Non-SNAP Shoppers

*Dollars per Buyer for Internet – Total U.S.*

<table>
<thead>
<tr>
<th></th>
<th>SNAP Households</th>
<th>Non-SNAP Households</th>
</tr>
</thead>
<tbody>
<tr>
<td>26 WE 12-29-2019</td>
<td>$188</td>
<td>$163</td>
</tr>
<tr>
<td>26 WE 12-27-2020</td>
<td>$362</td>
<td>$295</td>
</tr>
</tbody>
</table>

Source: IRI Consumer Network™, Total US – Internet 26 WE 12/27/20 / *Total Food & Beverage excludes Produce, Deli and Bakery

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In Addition, SNAP Households Are Contributing a Greater Portion of Food & Beverage Spend Online Than Non-SNAP Shoppers

% of Total Food & Beverage Purchased on Internet / Total U.S.


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Top Food & Beverage Items Purchased Online by SNAP Households Include Dinner, Snacks, Beverage Products

E-Commerce Platforms Can Be Used as an Opportunity to Educate Shoppers Based on Occasion or Needs to Assist in Engaging and Retaining These SNAP Shoppers

<table>
<thead>
<tr>
<th>Product</th>
<th>Index to Non-SNAP HHs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dried Meat Snacks</td>
<td>123</td>
</tr>
<tr>
<td>Sports Drinks</td>
<td>121</td>
</tr>
<tr>
<td>Breath Fresheners</td>
<td>132</td>
</tr>
<tr>
<td>Side Dishes – Rfg</td>
<td>130</td>
</tr>
<tr>
<td>Juice / Drink Concentrate – SS</td>
<td>135</td>
</tr>
<tr>
<td>Meat – Rfg</td>
<td>143</td>
</tr>
<tr>
<td>Pasta – FZ</td>
<td>134</td>
</tr>
<tr>
<td>Non-Fruit Drinks – SS</td>
<td>128</td>
</tr>
<tr>
<td>Dinner Sausage</td>
<td>128</td>
</tr>
<tr>
<td>Luncheon Meats</td>
<td>144</td>
</tr>
<tr>
<td>Tea / Coffee – Rfg</td>
<td>129</td>
</tr>
<tr>
<td>Sugar</td>
<td>153</td>
</tr>
</tbody>
</table>

In the next four weeks 19% of SNAP participants indicated they would buy most of their groceries online (either pickup or delivery)

(183 index vs. total respondents)

Source: IRI Consumer Network™, Total US – Internet 26 WE 12/27/2020 – % HH’s Buying - Above 120 Index
IRI Weekly Surveys among IRI Consumer Network™ Panel representing Total U.S. Primary Grocery Shoppers – Wave 24 (1/8-1/10)
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Innovation Themes to Attract and Retain SNAP Participants

Ease of Online – The behaviors consumers adopt as SNAP recipients will stick as they emerge from program participation. Support them with list-building, promotions earlier in the month and by waiving online fees.

Meal Solutions – Promote cook-from-scratch and healthy, affordable convenience meals. Demonstrate how products support specific health issues. When possible, include the cost of the recipe or meal to feed a family of four.

Education and Optimization – Promote innovative ways to assist nutrition assistance recipients on their financial and nutritional security journey. Retailers can promote store tour videos that teach budget meal shopping.

Pack Size Innovation – Package innovation can be just as important in a recession as new products. Estimate the demand for lower price points of small pack sizes as well as for larger, multi-serving sizes.

Private Label – High-quality private brands are an important innovation platform as retailers enhance their commitment to shoppers. Retailers should promote their differentiated products to make them a destination for shoppers.
BEST PRACTICES DURING COVID-19

These in-depth discussions with C-level leaders at top companies share how they are effectively managing through the COVID-19 pandemic. Learn More

Mark Clouse
President and CEO, Campbell Soup Company
November 10, 2020

Stuart Aitken
Chief Merchant & Marketing Officer, The Kroger Co.
September 3, 2020

Vivek Sankaran
President & CEO, Albertsons Companies
August 25, 2020
IRI’s Latest CPG and Retail Insights Reports to Manage the Impact of COVID-19 *(click to see full report)*

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5. COVID-19 Vaccine Update: Impact on CPG Industry

4. Anticipated Vaccine Adoption & Impact on the CPG Industry

3. Potential Impact of Reduced Unemployment Benefit Changes on F&B Spending

2. Consumer Stimulus, Unemployment Benefit Spending & Shopping Behavior

1. The Impact of a Second Round of Stimulus on the CPG Demand Curve

7. Defending and Recapturing the Shelf

6. Innovation Lessons From the Great Recession to Apply Today

5. Building Brands During Recessionary Times

4. Recessionary Lessons to Apply to Private Label Today

3. How Big Brands Performed During the Great Recession

2. Maintaining Pricing Discipline During a Recession

1. How the Great Recession Reshaped CPG Demand Curve
The IRI CPG Demand Index™ provides a standard metric for tracking changes in spending on consumer packaged goods.

U.S. Demand Index™ Forecasts are delivered through a proprietary, fully automated forecasting solution that anticipates consumer demand.

Channel Shift Index™ provides a standard metric for tracking changes (migration) in spending on consumer packaged goods across select channels.

The IRI E-Commerce Demand Index™ provides a standard metric for tracking changes in spending on consumer packaged goods purchased online.

Inflation Tracker™ provides the well-known price per unit metric for tracking changes in pricing of consumer packaged goods.

Supply Index™ provides a standard metric for tracking changes in product availability (i.e., in-stock rates) in stores for consumer packaged goods.

Out-of-Stock Levels for Top-Selling Subcategories by Market Area in the U.S.

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