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Bakery and Deli Sales Move Into Positive Growth Territory

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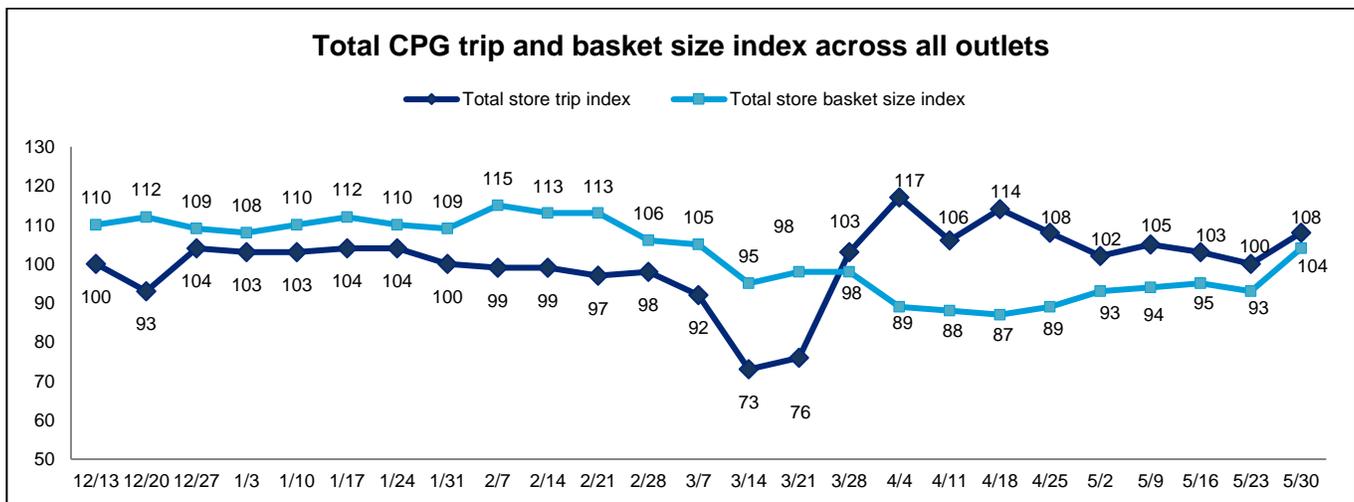
Many aspects of the shopping trip have started to normalize, which is creating a much more favorable sales environment for fresh bakery and deli prepared, but also continued opportunities for dairy, deli cheese, deli meat and packaged bakery in the center store. “According to the May IRI shopper survey, shoppers point to a low rate of infection (45%) and broad vaccination (39%) as the top indicators of what makes them feel comfortable to return to their normal habits without COVID-related precautions,” said Jonna Parker, team lead for IRI. “As the number of new COVID-19 cases is down across states and 66% of shoppers have received one or two vaccines, according to the May IRI survey, consumer concern is declining rapidly.”

The May survey also found that the share of consumers who are “extremely concerned” is at its lowest level (35%) since the first wave of the monthly survey, conducted in March 2020. Additionally, only 5% say they are more concerned about COVID-19 than they were the week prior — a share that rose as high as 59% in late March 2020.

“As anxiety is abating, many consumers have already started to re-engage with restaurants in the past few weeks,” said Parker. “In addition to the 52% who have gotten takeout, 40% have dined inside at a restaurant, and 14% have eaten outdoors at a restaurant.” 210 Analytics, IRI and IDDBA partnered to understand how the dairy, deli and bakery departments performed relative to their 2020 and 2019 sales results.

Trips and Basket Size

In May 2020, consumers took significantly fewer trips while spending 10-15% more each visit. A year later, that pattern translates into an increase in total food store visits as shopping patterns are normalizing, while the average spend per trip is below 2020 levels. However, the average spend per trip is starting to track closer to year-ago levels than it did in April. The increase in trips is likely to benefit grocery deli-prepared foods and bakery sales, which are both highly related to trip frequency.



Source: IRI, household panel, total U.S., all outlets

“The return to on-premises dining is likely to affect the high levels of home-centric spending seen in the past 15 months,” said Jeremy Johnson, VP of education for IDDBA. “But at the same time, consumers are making more in-person trips and getting back to celebrations. This will positively influence fresh bakery and deli-prepared sales. Additionally, consumers feeling more relaxed and slowing down to browse for new items and meal ideas provides a welcome opening for product innovations, which took a bit of a back seat in 2020.”



Perimeter Performance

A look across fresh foods departments for the five weeks ending May 30, 2021, versus year ago shows mixed performance. Departments with strong sales results in 2020 have a much tougher road map to stay ahead of prior-year sales. This is the case for meat, produce, refrigerated (including dairy) and seafood. On the other hand, departments that struggled during the early pandemic months, including fresh bakery and deli prepared, are now tracking ahead. Importantly, both deli and bakery May 2021 sales results tracked ahead of 2020 and 2019.

May 2021 (5 weeks from 5/2 through 5/30/21)	\$ sales	Dollar sales gains vs. 2019	Dollar sales gains vs. 2020
Total perimeter sales	\$29.6B	+13.3%	-4.3%
Meat	\$7.7B	+15.8%	-11.0%
Produce	\$7.1B	+12.5%	-3.7%
Refrigerated (including dairy)	\$6.6B	+12.5%	-8.5%
Deli (meat, cheese and deli prepared)	\$3.9B	+11.6%	+14.8%
Bakery	\$3.5B	+9.6%	+3.1%
Seafood	\$0.7B	+31.1%	-11.6%

Source: IRI Integrated Fresh, total U.S., MULO, % change vs. YA, fixed- and random-weight items combined into department views

Dairy

“During each of the May 2021 weeks, dairy sales exceeded the \$1 billion mark,” said Eric Richard, industry relations coordinator with IDDBA. “Importantly, demand is holding strong against the 2019 pre-pandemic normal, with increases ranging from 8.6% to 16.2% across the five weeks. When compared to the 2020 sales spikes, it is unsurprising to see down results, as May 2020 still saw very strong dairy sales as a result of many more at-home breakfast, lunch, dinner, snack and baking occasions.”

Dairy	Dollar sales	Dollar gains vs. 2019	Dollar gains vs. 2020
w.e. 5/2/21	\$1.09B	+9.4%	-13.6%
w.e. 5/9/21	\$1.12B	+10.9%	-11.1%
w.e. 5/16/21	\$1.08B	+10.5%	-9.2%
w.e. 5/23/21	\$1.08B	+8.6%	-9.7%
w.e. 5/30/21	\$1.11B	+16.2%	-0.9%

Sales for the five May weeks totaled \$5.5 billion, which was up more than 11% versus the 2019 pre-pandemic normal but down 9.1% versus May 2020. Only one area managed an increase versus year ago sales, that being yogurt. Others, including cream/creamers and milk, are not far off. Categories that had very strong sales in May 2020 had a much harder time lapping those results and tracked behind in the double digits. These include cheese, eggs and butter.

Current dollar sales vs. the same time period a year ago										
	2019	Q1 '20	Q2 '20	Q3 '20	Q4 '20	Q1 '21	Apr '21	May '21	May vs. '19	May vs. '20
Dairy	+0.2%	+11.7%	+21.5%	+11.9%	+9.0%	-0.2%	-15.0%	\$5.5B	+11.1%	-9.1%
Milk	+0.7%	+11.3%	+14.1%	+8.7%	+6.9%	-1.4%	-11.7%	\$1.4B	+7.7%	-5.9%
Natural cheese	+2.1%	+17.1%	+31.3%	+17.4%	+14.0%	+1.6%	-17.9%	\$1.0M	+15.8%	-12.2%
Yogurt	-0.5%	+4.2%	+2.4%	+3.5%	+4.6%	-1.7%	+4.6%	\$772M	+8.0%	+5.0%
Eggs	-10.3%	+7.7%	+38.4%	+16.6%	+9.5%	-1.8%	-26.8%	\$568M	+13.3%	-17.6%
Cream/creamers	+7.7%	+11.3%	+21.2%	+14.8%	+12.7%	+6.5%	-6.4%	\$443M	+18.2%	-3.2%
Butter/margarine	+1.4%	+19.3%	+35.1%	+12.5%	+5.0%	-7.3%	-32.9%	\$396M	+5.4%	-25.1%
Processed cheese	-3.0%	+20.7%	+24.9%	+12.3%	+9.5%	-6.3%	-24.4%	\$214M	+5.9%	-12.6%
Cream cheese	+3.8%	+15.7%	+28.4%	+19.9%	+12.1%	+9.3%	-13.9%	\$184M	+20.3%	-8.5%
Sour cream	+0.2%	+10.6%	+28.2%	+12.6%	+5.8%	+0.7%	-22.7%	\$120M	+7.6%	-17.0%
Whipped toppings	+9.4%	+10.1%	+34.2%	+24.1%	+18.5%	+17.2%	-10.6%	\$130M	+22.4%	-11.7%
Cottage cheese	-3.1%	+2.0%	+8.7%	+4.5%	+5.0%	-4.1%	-10.8%	\$103M	-0.8%	-9.2%

Source: IRI, total U.S., Integrated Fresh, MULO, % growth versus a year ago



In the year-over-year look, dollars, units and volume sales trended below 2020 levels for virtually all dairy categories, as could be expected. Yogurt is the notable exception, with increases in dollars, units and volume versus a year ago, in addition to being an area of growth most months in 2020. Another interesting area to watch is refrigerated cheese snacks.

“While small, the growth in dollars, units and volume in cheese snack kits reflects the increase in consumer mobility,” said Richard. “Throughout most of 2020, on-the-go and entertaining items tended to have a much weaker performance, whereas larger packages did well. As consumers are taking road trips and are getting back to evening and weekend activities, the need for individual packaging and instant consumables is returning. This same trend is behind the increase in yogurt sales.”

May 2021	\$ gains	Unit sales	Volume gains
Dairy	-9.1%	-8.2%	---
Milk	-5.9%	-7.3%	-10.8%
Natural cheese	-12.2%	-11.6%	-11.9%
Yogurt	+5.0%	+3.8%	+3.5%
Eggs	-17.6%	-14.9%	---
Cream/creamers	-3.2%	-3.2%	-2.8%
Butter/margarine	-25.1%	-24.8%	-24.8%
Processed cheese	-12.6%	-14.6%	-12.7%
Cream cheese	-8.5%	-10.2%	-9.2%
Sour cream	-17.0%	-15.5%	-16.8%
Whipped toppings	-11.7%	-10.6%	-9.9%
Cottage cheese	-9.2%	-5.0%	-9.2%
Refrigerated desserts	+18.4%	+11.8%	+8.2%
Cheese snack kits	+8.7%	+9.6%	+10.9%

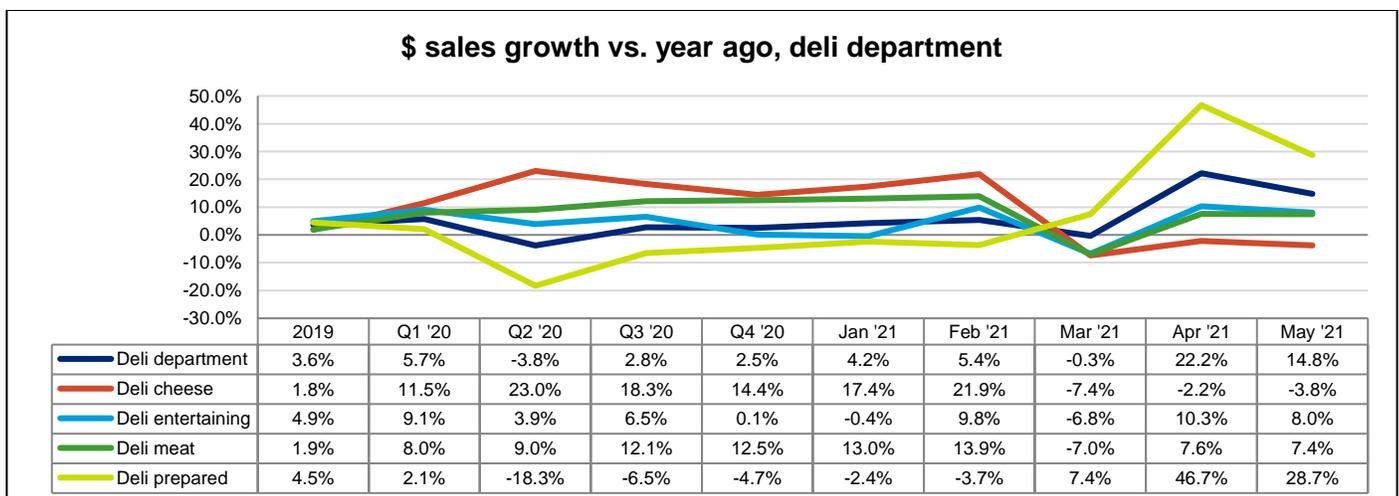
Source: IRI, total U.S., Integrated Fresh, MULO, % growth versus a year ago

Deli

“May 2021 is an all-around win for the deli department,” said Angela Bozo, education director with IDDBA. “Deli sales are the compilation of cheese, meat and prepared foods. From the very start of the pandemic, its performance was a story of two tales. Sales for cheese and meat, whether packaged in the refrigerated area or deli, were very strong since the start of the pandemic and still are. In contrast, deli prepared struggled once social distancing started. While prepared foods made a big comeback as the months ticked by, sales never quite got back to pre-pandemic levels in 2020. In May 2021, this means deli prepared has an easier time in going up against year-ago levels than meat and cheese — pulling up the results for the entire department whether compared with 2019 or 2020.”

Deli	Dollar sales	Dollar gains vs. 2019	Dollar gains vs. 2020
w.e. 5/2/21	\$768M	+10.5%	+15.1%
w.e. 5/9/21	\$790M	+11.7%	+15.1%
w.e. 5/16/21	\$772M	+10.7%	+15.6%
w.e. 5/23/21	\$784M	+7.8%	+9.6%
w.e. 5/30/21	\$821M	+17.2%	+18.9%

Deli-prepared food sales continued to accelerate in May 2021. Compared with 2019, prepared food sales increased 28.7% in May. Sales are, however, also up against the 2019 pre-pandemic baseline, at +7.0%. Deli meat also continued to generate strong sales. Only deli cheese saw slight year-over-year declines.



Source: IRI, total U.S. Integrated Fresh, MULO, one-month % growth versus a year ago



Deli Meat

Deli meat sales (combined fixed and random weight) totaled \$727 million in the five May 2021 weeks, which translated into increases compared to both 2019 and 2020 sales totals. Deli meat also generated volume gains in both years.

Total deli meat (FW/RW)	Current sales vs. 2019 and 2020									May vs. '19	May vs. '20
	2019	Q1 '20	Q2 '20	Q3 '20	Q4 '20	Q1 '21	Apr '21	May '21			
Dollars	+1.9%	+8.0%	+9.0%	+12.1%	+12.5%	+6.4%	+7.6%	\$727M	+16.4%	+7.4%	
Volume	-0.1%	+4.8%	+3.9%	+6.0%	+7.3%	+2.4%	+6.9%	82M	+7.6%	+3.9%	

Taking a closer look at deli meat shows that grab & go (random weight, but sliced for self-service) has been the main driver of the deli meat success in the pandemic months and continued to track ahead of year-ago levels in May 2021. All three areas were up against a year ago, demonstrating that service cut-to-order is making a comeback also. Service deli sales were, by far, the largest, at \$454 million.

Total deli meat (FW/RW)	Current sales vs. 2019 and 2020									May vs. '19	May vs. '20
	2019	Q1 '20	Q2 '20	Q3 '20	Q4 '20	Q1 '21	Apr '21	May '21			
Grab & go	+24.5%	+35.2%	+72.4%	+56.9%	+55.9%	+38.9%	+4.2%	\$200M	+86.4%	+7.1%	
Presliced	+5.1%	+12.6%	+27.0%	+23.7%	+18.6%	+13.2%	+8.6%	\$74M	+32.8%	+3.2%	
Service	-2.6%	+1.7%	-7.7%	-0.3%	+0.6%	-3.6%	+8.9%	\$454M	-1.7%	+8.2%	

Packaged lunchmeat sales generated another \$519 million in May 2021. This was an increase versus 2019, but a slight year-over-year decline versus 2020. Volume was mostly flat versus the pre-pandemic normal.

Meat dept. packaged lunchmeat (excludes deli)	Current sales vs. 2019 and 2020									May vs. '19	May vs. '20
	2019	Q1 '20	Q2 '20	Q3 '20	Q4 '20	Q1 '21	Apr '21	May '21			
Dollars	-0.6%	+13.3%	+11.4%	+5.4%	+9.8%	-5.1%	-11.5%	\$519M	+6.1%	-3.1%	
Volume	-2.0%	+11.0%	+4.9%	-1.1%	+3.7%	-9.1%	-12.2%	108M	-0.5%	-3.7%	

Source: IRI, total U.S. Integrated Fresh, MULO, % growth versus a year ago, deli includes known deli products based on IRI's Integrated Fresh research process powered in cooperation with IDDBA

Deli Cheese

The sales patterns for deli cheese during the four April 2021 weeks were very similar to those seen in deli meat. Sales dropped in comparison to 2020 but increased over the 2019 baseline.

Total deli cheese (FW/RW)	Current sales vs. 2019 and 2020									May vs. '19	May vs. '20
	2019	Q1 '20	Q2 '20	Q3 '20	Q4 '20	Q1 '21	Apr '21	May '21			
Dollars	+1.8%	+11.5%	+23.0%	+18.3%	+14.4%	+9.9%	-2.2%	\$735M	+20.5%	-3.8%	
Volume	+0.5%	+8.8%	+19.0%	+13.4%	+9.9%	+5.4%	-6.6%	97M	+12.4%	-7.3%	

Grab & go, presliced and specialty deli cheese showed year-over-year declines in May, whereas service deli cheese grew sales. However, the strength of specialty cheese can be seen in the comparison to the 2019 pre-pandemic normal, at +24.7%.



Total deli cheese (FW/RW)	Current sales vs. 2019 and 2020								May vs. '19	May vs. '20
	2019	Q1 '20	Q2 '20	Q3 '20	Q4 '20	Q1 '21	Apr '21	May '21		
Grab & go	+8.0%	+19.5%	+45.6%	+31.5%	+24.6%	+15.1%	-9.3%	\$106M	+35.3%	-7.6%
Presliced	-2.1%	+12.8%	+25.7%	+18.9%	+14.8%	+5.4%	-4.4%	\$59M	+21.4%	-4.5%
Service	-1.6%	+7.0%	-3.3%	-0.9%	-0.3%	-6.2%	+2.3%	\$115M	-2.6%	+2.2%
Specialty	+2.2%	+11.2%	+26.3%	+21.6%	+16.5%	+14.3%	-1.2%	\$455M	+24.7%	-4.2%

Source: IRI, total U.S., MULO, Integrated Fresh % growth versus a year ago, deli cheese includes known deli products based on IRI's Integrated Fresh research process powered in cooperation with IDDBA

Deli-Prepared Foods

Much as restaurant traffic and sales are recovering rapidly, so is deli prepared and deli entertaining. "The lower levels of consumer concern really came out Memorial Day weekend," said IDDBA's Richard. "Whether compared to the pre-pandemic normal of 2019 or year-ago levels, offerings such as holidays meals, trays, sandwiches and side dishes had a tremendous May. People are getting back together, and [the] department seeing the clearest signs of that is the deli. Now it will be imperative to translate this positive holiday momentum in growing everyday engagement as well."

On the deli-prepared side, all areas tracked ahead of 2020 levels, with the biggest year-on-year gains for combination meals and desserts. The performance against April 2019 is mixed; however, six areas trended in the positive in April, including deli-prepared foods overall.

Deli prepared	Current sales vs. 2019 and 2020									
	2019	Q1 '20	Q2 '20	Q3 '20	Q4 '20	Q1 '21	Apr '21	May '21	May vs. '19	May vs. '20
Deli entertaining	+4.9%	+9.1%	-3.9%	+6.5%	+0.1%	+1.3%	+10.3%	\$438M	+11.9%	+8.0%
Holiday meals	+3.1%	-25.8%	+13.0%	+7.7%	+22.4%	+129.8%	+17.9%	\$39K	+485%	+535%
Spreads	-0.2%	+7.3%	+2.5%	+3.7%	-1.8%	-7.6%	-3.1%	\$91M	+1.7%	-0.9%
Trays	+4.9%	+2.4%	-38.6%	-14.8%	-26.0%	-0.5%	+154.5%	\$68M	+16.6%	+94.4%
Deli prepared	+4.5%	+2.1%	-18.3%	-6.5%	-4.7%	-3.7%	+46.7%	\$2.0B	+7.0%	+28.7%
Appetizers	+5.5%	-2.6%	-24.3%	-14.8%	-16.9%	-9.7%	+41.7%	\$164M	-7.9%	+17.7%
Breakfast	+32.9%	+16.3%	+7.4%	+7.0%	+16.2%	+11.7%	+30.9%	\$36M	+32.9%	+21.4%
Combo meals	-0.4%	-9.7%	-68.8%	-59.7%	-37.1%	-34.7%	+143.9%	\$16M	-37.8%	+86.7%
Desserts	-2.9%	-5.5%	-44.5%	-24.1%	-8.5%	-2.7%	+112.7%	\$10M	-1.5%	+81.2%
Entrees	+5.4%	+1.2%	-19.4%	-4.2%	-1.4%	+12.7%	+73.4%	\$495M	+24.6%	+44.4%
Pizza	+3.8%	+3.6%	-20.3%	-13.4%	-10.7%	-10.4%	+20.0%	\$63M	-2.8%	+21.2%
Prepared meats	+4.1%	+5.8%	-13.0%	-6.6%	-6.5%	-5.7%	+29.8%	\$381M	-3.4%	+13.2%
Salads	+2.2%	+3.8%	-16.1%	-5.6%	-3.2%	+1.2%	+40.3%	\$412M	+5.1%	+25.2%
Sandwiches	+5.0%	-1.3%	-26.3%	-6.7%	-3.2%	-5.0%	+80.7%	\$282M	+11.7%	+51.0%
Side dishes	-0.9%	+10.0%	+7.5%	+13.4%	+12.1%	+6.1%	+12.7%	\$117M	+17.3%	+9.1%
Soups & chili	+10.7%	-2.6%	-26.0%	-13.5%	-14.0%	-6.2%	+36.4%	\$58M	-0.6%	+37.5%

Source: IRI, total U.S., MULO, Integrated Fresh, % increase versus same period a year ago, deli-prepared foods, including both fixed and random weight, includes known deli products based on IRI's Integrated Fresh research process powered in cooperation with IDDBA

Bakery

Bakery department sales, including both perimeter and aisle bakery, exceeded \$650 million in each of the May 2021 weeks. The week ending May 30 was the strongest of the five weeks, generating \$734 million, which was an increase of 16.4% versus 2019 and 11.2% versus 2020. "In addition to the strong results in deli prepared and entertaining items, the strength of bakery sales is another sign of consumers getting back to normal celebrations," said Richard. "Between Mother's Day, graduations and Memorial Day, bakery had a very strong month."

Bakery	Dollar sales	Dollar gains vs. 2019	Dollar gains vs. 2020
w.e. 5/2/21	\$666M	+9.2%	+0.9%
w.e. 5/9/21	\$716M	+9.6%	+1.8%
w.e. 5/16/21	\$690M	+10.1%	+4.1%
w.e. 5/23/21	\$682M	+3.0%	-2.2%
w.e. 5/30/21	\$734M	+16.4%	+11.2%

Split out by perimeter and aisle, bakery underscores the revival of perimeter bakery in recent months. Whereas aisle bakery had a strong 2020, perimeter bakery had many sales struggles, as consumers' special celebrations were on



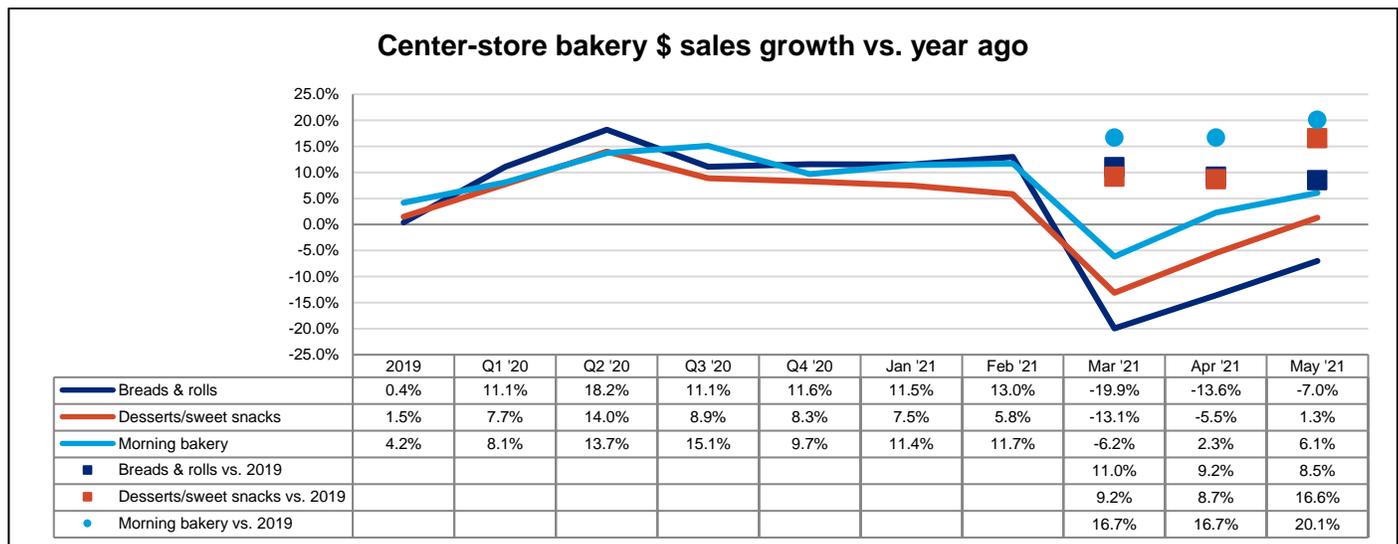
the back burner throughout much of 2020. In May 2021, perimeter bakery sales increased 15.8% versus a year ago, totaling \$1.5 billion in sales.

May 2021	Sales	Dollar % gains	Absolute dollar gains
Department bakery	\$3.5B	+3.1%	+\$104M
Perimeter bakery	\$1.5B	+15.8%	+\$198M
Aisle bakery	\$2.0B	-4.5%	-\$95M

Source: IRI, total US, Integrated Fresh, MULO, % growth versus a year ago

Center-Store Bakery

Baked goods items found in the “aisle” or center-store area adjacent to, but not included in, the perimeter bakery area have recovered from their significant declines in March and April. Only breads and rolls came in slightly behind 2020 levels, but all areas were still well above the 2019 pre-pandemic baseline.



Source: IRI, total U.S., MULO, Integrated Fresh, one-month % growth versus a year ago includes known baked goods commonly found in the bakery aisle based on IRI's Integrated Fresh research process powered in cooperation with IDDBA

A similar pattern is seen at the subcategory level, with a few exceptions. Croissants, tortillas/wraps, brownies, cookies, muffins and Danish pastries increased their sales versus May 2020, but the others saw either modest or significant year-over-year declines. However, the same as seen earlier, all areas still saw increased demand versus the pre-pandemic normal.

Center-store baked goods	Current sales vs. 2019 and 2020									
	2019	Q1 '20	Q2 '20	Q3 '20	Q4 '20	Q1 '21	Apr '21	May '21	May vs. '19	May vs. '20
Breads	-0.3%	+9.9%	+15.0%	+7.3%	+7.8%	-3.8%	-16.8%	\$807M	+4.8%	-6.8%
Buns & rolls	+1.8%	+15.8%	+20.6%	+14.8%	+15.3%	+3.9%	-8.6%	\$471M	+10.4%	-8.2%
Snack cakes	+2.6%	+3.8%	+12.8%	+8.2%	+9.8%	+1.5%	-5.7%	\$116M	+13.6%	-2.5%
Bagels/bialys	4.3%	+10.8%	+32.1%	+23.3%	+26.1%	+14.0%	-9.0%	\$114M	+25.8%	-4.8%
Donuts	+0.2%	+6.4%	+19.1%	+21.3%	+8.3%	+4.7%	-7.2%	\$107M	+14.7%	-4.8%
Muffins	+12.5%	+13.7%	+9.2%	+15.2%	+15.1%	+10.4%	+18.3%	\$74M	+35.7%	+29.0%
English muffins	-2.1%	+5.9%	+26.1%	+14.2%	+13.8%	+5.0%	-20.7%	\$72M	+10.6%	-11.3%
Cookies	+3.2%	+9.5%	+13.1%	+6.7%	+6.2%	-6.3%	-10.9%	\$68M	+14.6%	+3.4%
Pastries/Danishes/coffee cakes	+3.2%	+4.8%	+8.6%	+3.6%	+6.4%	+2.0%	+3.9%	\$55M	+12.8%	+4.4%
Brownies/squares/bars	-0.8%	+10.7%	+12.1%	+10.3%	+6.0%	+2.7%	+3.3%	\$41M	+23.2%	+11.5%
Cakes	+0.3%	+8.5%	+17.5%	+8.9%	+9.6%	+3.5%	-5.3%	\$34M	+19.9%	-0.4%
Pies	-2.5%	+17.5%	+19.9%	+15.1%	+7.9%	-1.2%	-3.5%	\$26M	+21.8%	+0.9%
Tortillas/wraps/flatbreads	-1.2%	+11.2%	+9.3%	+18.0%	+15.5%	+3.6%	+8.7%	\$23M	+15.9%	+9.0%
Croissants	-20.1%	+1.0%	+0.3%	+24.0%	+28.1%	+15.9%	+44.9%	\$8M	+35.2%	+31.6%

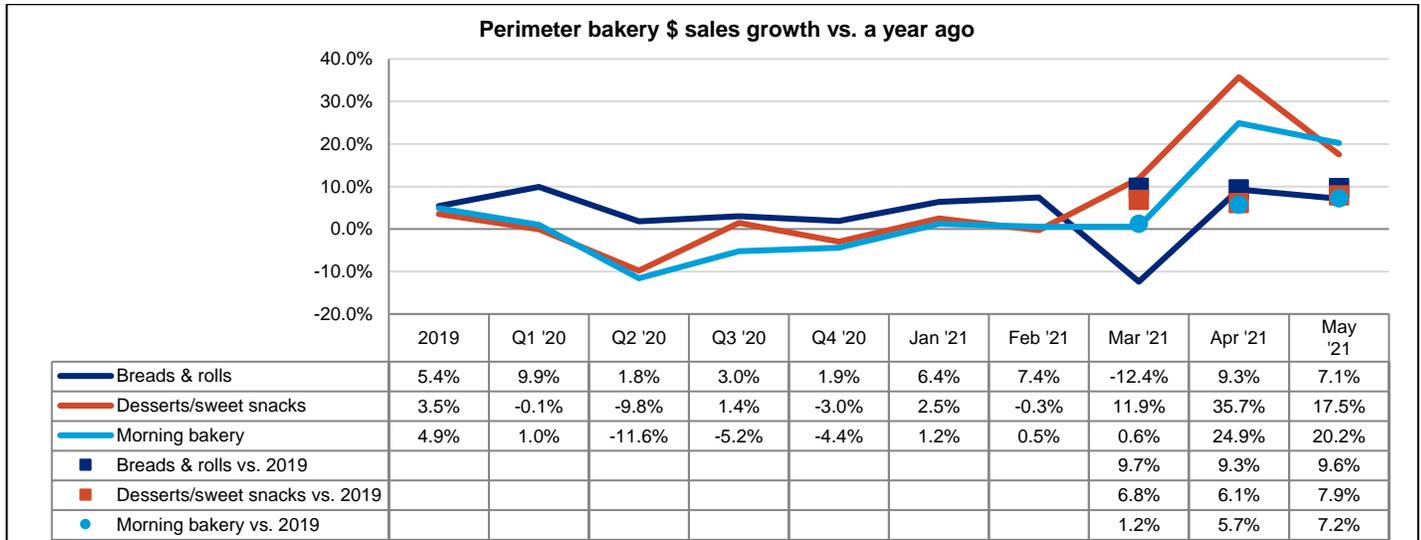


Source: IRI, total U.S. Integrated Fresh, MULO, % growth versus a year ago includes known baked goods commonly found in the bakery aisle based on IRI's Integrated Fresh research process powered in cooperation with IDDBA

Perimeter Bakery

The May 2021 perimeter bakery results show the reversal of what's up and what's down due to pandemic peaks and drops in 2020. Morning bakery, desserts and sweet snacks took a big hit in April 2020 as a result of shelter-in-place orders that severely impacted everyday and holiday celebrations traditionally driving interest in sweet indulgences.

In May 2021, sales of all areas within perimeter bakery were strong. Gains were generated versus 2020 and 2019.



Source: IRI, total U.S., MULO, Integrated Fresh, one-month % growth versus a year ago includes known baked goods commonly found in the bakery aisle based on IRI's Integrated Fresh research process powered in cooperation with IDDBA

Performance data for the subcategory areas also underscores the recovery of perimeter bakery. Several areas saw sales increases whether compared with 2019 or 2020. There is perhaps no better illustration than the dominant sales of cakes and cookies to underscore that celebrations and gatherings are normalizing.

Perimeter bakery	Current sales vs. 2019 and 2020								May '21	May vs. '19	May vs. '20
	2019	Q1 '20	Q2 '20	Q3 '20	Q4 '20	Q1 '21	Apr '21				
Cakes	+2.4%	-1.6%	-9.6%	+2.8%	-3.2%	+6.9%	+42.2%	\$516M	+8.9%	+18.3%	
Cookies	+6.1%	+6.1%	-10.1%	-1.2%	-4.9%	+2.0%	+26.2%	\$191M	+7.8%	+19.2%	
Pastries/Danishes/coffee cakes	+7.7%	+4.0%	-1.0%	+5.3%	+1.1%	+9.0%	+20.4%	\$142M	+17.7%	+17.0%	
Breads	+3.4%	+10.5%	+7.2%	+7.1%	+4.2%	+1.0%	+2.1%	\$123M	+9.4%	+1.8%	
Muffins	+4.5%	+2.5%	-5.2%	-2.6%	+1.5%	+3.2%	+23.8%	\$93M	+9.4%	+15.3%	
Donuts	+1.6%	-4.0%	-30.8%	-20.9%	-17.0%	-11.0%	+34.6%	\$87M	-8.4%	+32.1%	
Pies	+2.2%	-5.1%	-6.1%	+4.3%	+1.4%	+7.1%	+22.3%	\$84M	+4.6%	+6.9%	
Buns & rolls	+1.5%	+5.6%	-6.0%	-4.4%	-5.3%	-5.8%	+11.2%	\$79M	+1.4%	+6.4%	
Croissants	+25.6%	+21.7%	+9.3%	+12.3%	+13.5%	+14.7%	+27.0%	\$47M	+34.7%	+24.1%	
Brownies/squares/bars	+6.2%	+6.3%	-4.6%	+6.8%	-1.1%	+15.0%	+39.6%	\$33M	+16.9%	+20.0%	
Tortillas/wraps/flatbreads	+3.7%	+7.9%	+8.5%	+11.5%	+12.6%	+7.1%	+12.7%	\$26M	+15.3%	+4.1%	
Bagels/bialys	+6.0%	+6.9%	-16.0%	-14.3%	-12.3%	-11.8%	+11.0%	\$22M	-4.5%	+14.2%	
Specialty desserts	+7.6%	-13.1%	-42.8%	-37.1%	-27.8%	-18.0%	+52.6%	\$11M	-23.7%	+29.8%	

Source: IRI, total U.S. Integrated Fresh, MULO, % growth versus a year ago includes fixed- and random-weight baked goods known to be commonly found in the perimeter bakery area based on IRI's Integrated Fresh research process powered in cooperation with IDDBA



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What's Next?

Consumers' re-engagement with restaurants may signal a greater share of food dollars starting to flow from retail to foodservice. However, it is likely that at least some of the increases in on-premises dining are replacing food delivery or pickup that became very popular over the past 15 months. This means it is more important than ever for retailers to actively promote their deli-prepared offerings as viable restaurant alternatives, whether for takeout, delivery or consumption in-store. Being on the radar come mealtime was always an area of struggle for grocery deli-prepared foods. Not having been in the line of sight for many months means rebuilding top-of-mind awareness when shoppers decide to have someone else do the cooking will be crucial.

Memorial Day celebrations and the return of strong sales in party trays, cakes, cookies and more signal that consumers are ramping up their backyard gatherings. This means we may also see increased interest in some of the larger bakery items, such as half and full sheet cakes, that saw deep declines in sales throughout most of 2020.

The next report in the IRI, 210 Analytics and IDDBA performance series will be released in mid-July to cover the June sales trends. Please recognize and thank the entire food supply chain for all they do to keep supply flowing.

Date Ranges:

2019: 52 weeks ending 12/28/19

Q1 2020: 13 weeks ending 3/29/20

Q2 2020: 13 weeks ending 6/28/20

Q3 2020: 13 weeks ending 9/27/20

Q4 2020: 13 weeks ending 12/27/20

Q1 2021: 13 weeks ending 3/28/21

April: Four weeks ending 4/25/21

May: Five weeks ending 5/30/21