

Trends in Meal Making

A background image showing two burgers on a wooden cutting board. The burger in the foreground is in focus, showing a bun, a patty, lettuce, tomato, and onion. The second burger is slightly out of focus in the background. There are also some fresh vegetables like spinach and sliced onions on the board.

Fresh Conversations Convenient Meals Evolution

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Shoppers Not Yet Bouncing Back Completely to Pre-COVID Activities

80%

mean % of shoppers' meals made in the home – in 2019 this was **48%**

28%

of those employed plan to **work-from-home** 5 days a week in the next month- down **10 % pts** from Jan 2021

20%

spent **less time** shopping on latest grocery trip than they did for a similar type of trip before COVID-19

14%

Shopped **online** (pickup/delivery) the last time they bought groceries



Cooking Fatigue is Real – Shoppers Are Looking For Convenience, But Not Willing To Sacrifice on Quality and Freshness

CONVENIENCE FOODS ACROSS THE STORE: %HH BUYING AND CHG VS YA



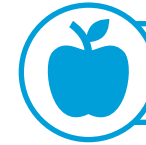
GROCERY

	%HH	CHG
Soup	94.6%	-1.2pts
Dry Packaged Dinner Mix	70.3%	-1.7pts
SS Dinner	66.6%	-3.7pts
Dry Rice Mix	48.0%	-1.5pts
Instant Potatoes	44.8%	-1.9pts



FROZEN

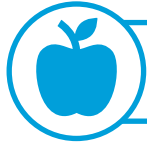
	%HH	CHG
Entrees	81.2%	-0.8pts
Pizza	71.9%	-1.8pts
Side Dishes	37.5%	+1.1pts
Breakfast Entrees	29.0%	+1.8pts
Soup	3.5%	+0.8pts



FRESH

	%HH	CHG
Deli Entrees	39.7%	+3.5pts
Deli Side Dish	34.1%	+1.2pts
Prepared Side Dish	23.8%	+0.7pts
Deli Soups	22.4%	+0.6pts
Deli Breakfast	12.7%	+1.4pts
Deli Appetizers	7.2%	+1.5pts
Cooking Meal Kits	6.8%	+1.3pts
Value Add Chicken	5.0%	+0.8pts
Value Add Beef	3.2%	+0.5pts

All Categories Benefitted From Increased HHs Purchasing, But Shoppers Also Spent More Per Trip and In Many Cases Increased Trips



FRESH CATEGORY GROWTH DRIVERS

	%HH	CHG	\$/BUYER	CHG	\$/TRIP	CHG	TRIP/BUYER	CHG
Deli Entrees	39.7%	+3.5pts	\$63.87	\$12.31	\$11.07	\$0.77	5.8	0.8
Deli Side Dish	34.1%	+1.2pts	\$21.79	\$0.72	\$6.43	\$0.07	3.4	0.1
Prep. Side Dish (Meat Dept)	23.8%	+0.7pts	\$28.19	\$1.26	\$4.95	\$0.10	5.7	0.1
Deli Soups	22.4%	+0.6pts	\$32.18	\$1.06	\$8.44	\$0.25	3.8	0.0
Deli Breakfast	12.7%	+1.4pts	\$22.56	\$2.06	\$6.58	\$0.24	3.4	0.2
Deli Appetizers	7.2%	+1.5pts	\$16.84	\$1.47	\$6.45	\$0.19	2.6	0.2
Cooking Meal Kits	6.8%	+1.3pts	\$25.91	\$1.64	\$13.39	(\$0.20)	1.9	0.1
Value Add Fresh Chicken	5.0%	+0.8pts	\$16.62	\$1.04	\$7.75	\$0.54	2.1	(0.0)
Value Add Fresh Beef	3.2%	+0.5pts	\$19.57	\$0.08	\$8.54	\$0.04	2.3	0.0

Even Within Fresh Convenience, Different Departments A Fulfilling The Needs Of Different Households; Innovation Opportunities Abound!

CONVENIENCE FRESH DEMOGRAPHICS: BUYER INDEX



DELI ENTREES



>\$100K HH



45-64, \$70K+ & \$100K



65+, \$70k+



RAISING TEENS



COOKING MEAL KITS



35-44, NO KIDS, \$70K+



YOUNG FAMILIES

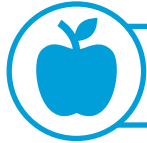


4 PERSON HH



>\$100K HH

Fresh Convenience Products are Dominant in Grocery, But Other Channels Are Adopting To Evolving Consumer Demand and Desires



FRESH CONVENIENCE BY CHANNEL

Share of Total Outlet

Dollar % Chg

All Outlets



+11%

Grocery



50.0%

+11.1%

Mass



8.8%

+5.9%

Drug



0.1%

-14.6%

Convenience



2.1%

+10.2%

Club



11.3%

+12.2%

Dollar



0.1%

+31.5%

Internet



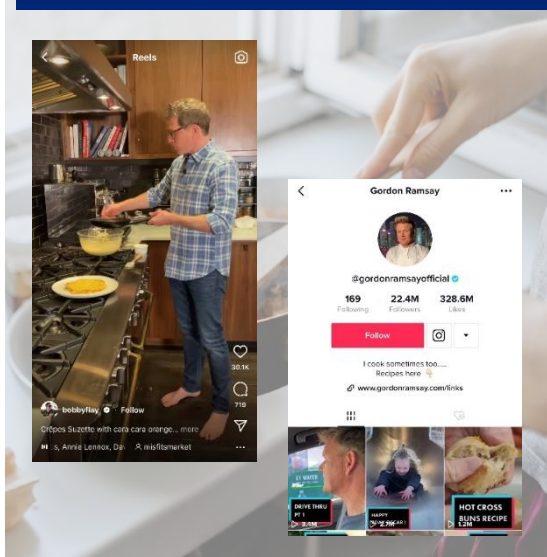
1.3%

+107.8%

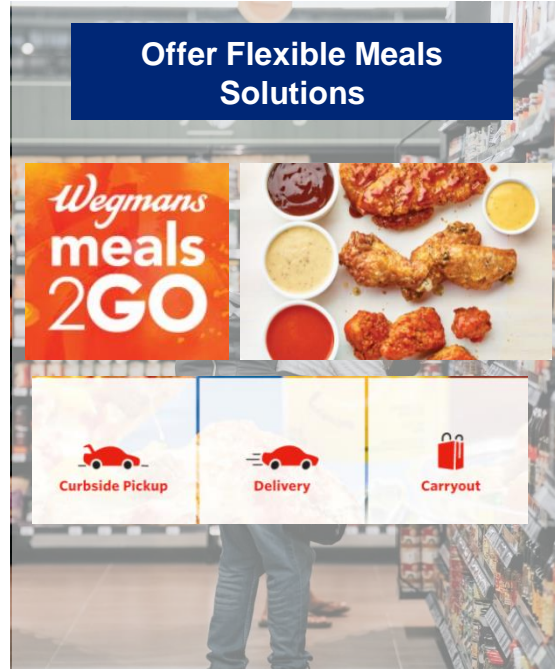
Retailers and Manufacturers are also Testing New Ways to Shop vs Traditional

Manufacturers should continue to teach people how to use ingredients and promote more occasions to easily create home-cooked meals

Develop & Promote Recipes & Social Media #WeCook



Offer Flexible Meals Solutions



Shoppable Recipes

