

WINNING IN CPG E-COMMERCE



EXECUTIVE SUMMARY

While COVID-19 accelerated the growth and adoption of e-commerce to an estimated \$175B* in CPG sales in 2020, retention of new shoppers, increasing comfort buying CPG online and acceleration of investments by leading retailers in online capabilities will drive expansion of online grocery further in 2021, representing an estimated ~12% of total edible and ~35% of nonedible sales.

CURRENT TRENDS

- E-commerce shopper **penetration is broadening across cohorts, categories and channels**, and online baskets increasingly resemble in-store baskets (e.g., fresh), including frequency. Shoppers are proving to be more loyal to brands and retailers when they shop online, often repeating their list.
- **Home shipment** (e.g., Amazon.com, Walmart, Target) **continues to dominate nonedible CPG** but **pickup and delivery** are preferred for **food and beverage purchases**.
- The online **shopper journey** is complex, with **many digital touch points**, requiring additional investments in digital marketing.
- Winning the **omnichannel shopper** is critical as they tend to spend more share of wallet with a single retailer.
- **National players** (e.g., Amazon, Walmart, Target, major grocers) are **winning more share of the online grocery market**, which will likely force **industry consolidation**, with **reintermediation** coming from players like Instacart and DoorDash.
- As evidenced by the growth of Instacart, consumers are **willing to pay a premium for delivery** services. While e-commerce consumers are less price sensitive than in-store consumers, most services deliver assortment and prices consistent with in-store.
- Most **larger manufacturers that have lower share in e-commerce** are benefiting from the growth of pickup and delivery. Smaller manufacturers win in home shipment.

OPPORTUNITIES | Retailers

- Continue to **invest with speed in digital capabilities and commerce** to gain omnichannel share.
- Consider driving **more pricing online vs. in-store** for convenience and variety, in addition to optimizing fulfillment costs and **media advertising to drive profitability**.
- Build **unique in-store and online experiences** to drive traffic, encourage discovery and **impulse** and increase occasion-based purchases.

OPPORTUNITIES | Manufacturers

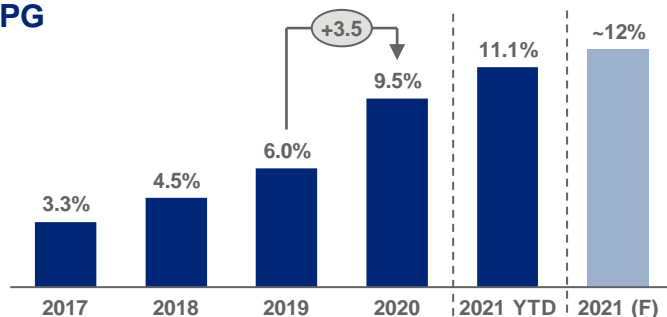
- Invest in **paid search, social media and shopping apps** to build online presence and increase share.
- Build **baskets for holidays** and events, in partnership with retailers, to cater to omnichannel shoppers. **Product availability** needs to support pickup and delivery as well as home shipment.
- **Offer more personalized solutions** and variety (flavors, packs) and **drive more price / mix** in online grocery.
- **Engage with your consumers** via direct-to-consumer initiatives and social media.



CPG E-Commerce Growth Will Continue in 2021, But at a Milder Pace Than 2020

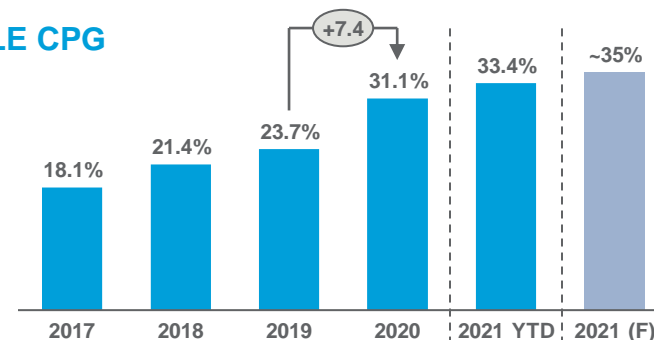
Share of E-Commerce in Omnichannel

EDIBLE CPG



	2017	2018	2019	2020	2021 YTD	2021 (F)
vs. YA	-	+1.2	+2.5	+3.5	+3.8	~+2.5
E-comm \$B	\$16	\$23	\$31	\$57	\$11	~\$67
E-comm Contribution to Growth	-	47%	56%	32%	38%	-
Omnichannel Growth	-	2.7%	3.0%	15.2%	13.9%	~-3.5%

NONEDIBLE CPG





	2017	2018	2019	2020	2021 YTD	2021 (F)
vs. YA	-	+3.3	+2.3	+7.4	+7.5	~-3.9
E-comm \$B	\$46.0	\$58	\$68	\$105	\$19	~\$111
E-comm Contribution to Growth	-	75%	66%	73%	101%	-
Omnichannel Growth	-	6.2%	5.5%	17.7%	11.1%	~-7%

Other areas of retail with higher e-commerce presence saw even greater shifts in 2020: electronics (50% e-commerce share, +11ppts. vs. YA), office supplies (40%, +11ppts.), toys / hobby (41%, +8ppts.), apparel (38%, +11ppts.)¹

Note: Based on 205 CPG categories currently tracked in e-commerce. Estimated 2020 e-commerce share for all CPG categories is 7.8% for edible and 22.3% for nonedible, accounting for \$175B total CPG e-commerce sales. E-commerce data is based on projected receipt-based sample and reported data with varying levels of granularity and accuracy available. 1. eMarketer U.S. Retail e-commerce Sales Share, by Product Category: % of Total Retail Sales. Source: IRI Omnichannel, data ending 2/28/21. IRI Strategic Analytics forecasts.

The Majority of Online Shoppers Will Continue Their Purchase Habits Post-Pandemic

% of Consumers Who Currently Do This Activity and Will Continue This Activity Post-Pandemic

	January 2021	February 2021	March 2021
 Shops online for groceries, with curbside pickup	63%	64%	68%
 Shops online for grocery delivery	61%	60%	62%
 Goes grocery shopping at stores	77%	79%	80%

Slight Uptick in Consumers Increasing Their Usage of Curbside Pickup



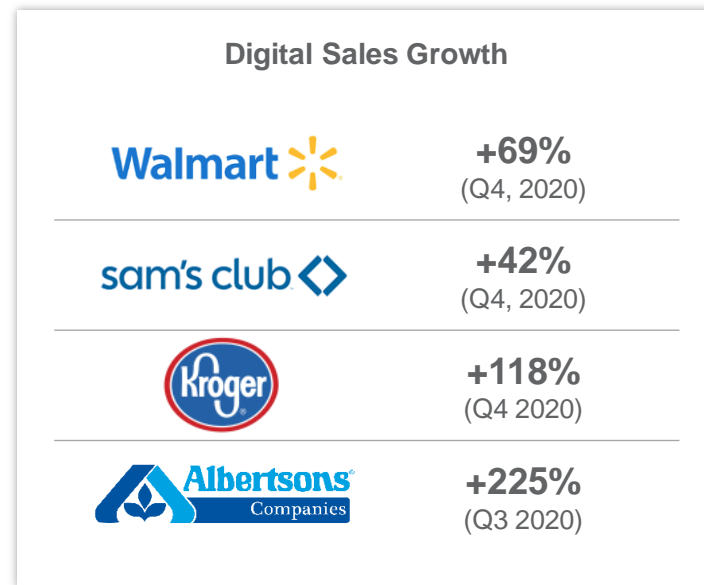
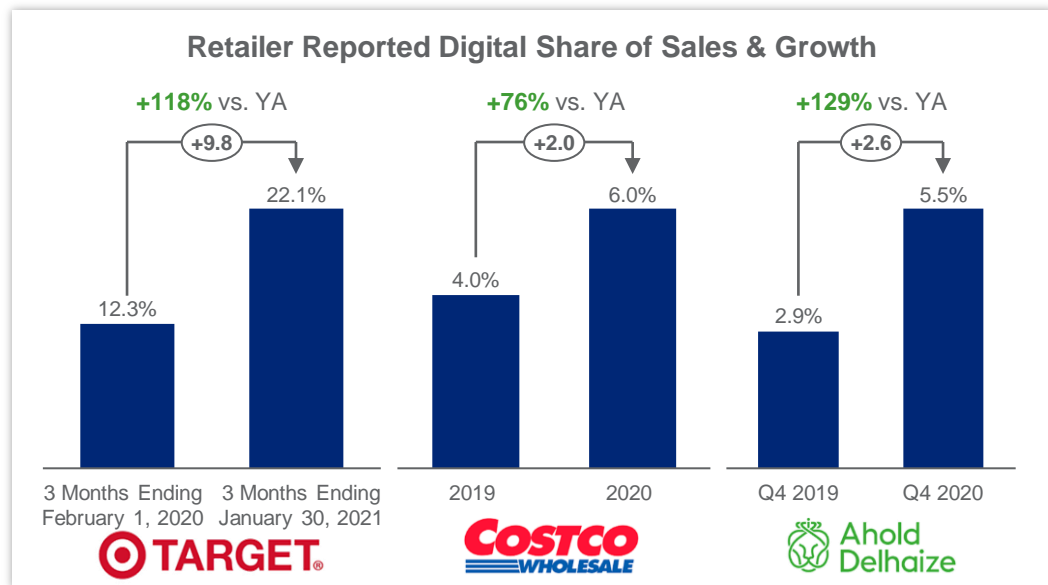
Source: IRI Survey collected January, February, March 2021 among National Consumer Panel representing Total U.S. Primary Grocery Shoppers.

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For Many Retailers, Digital Sales Now Account for a Significant Portion of Omnichannel Sales and Have a Strong Contribution to Growth

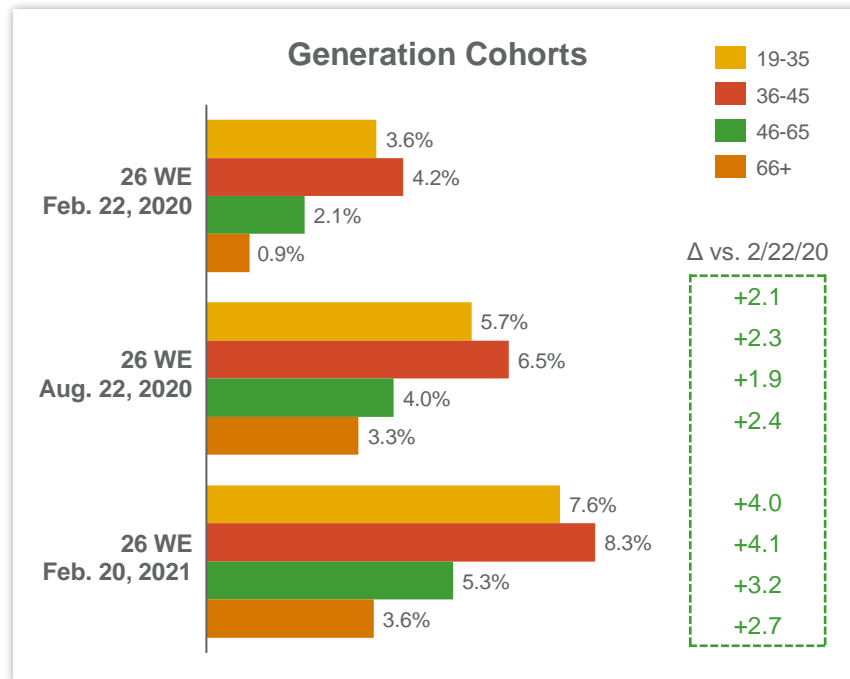
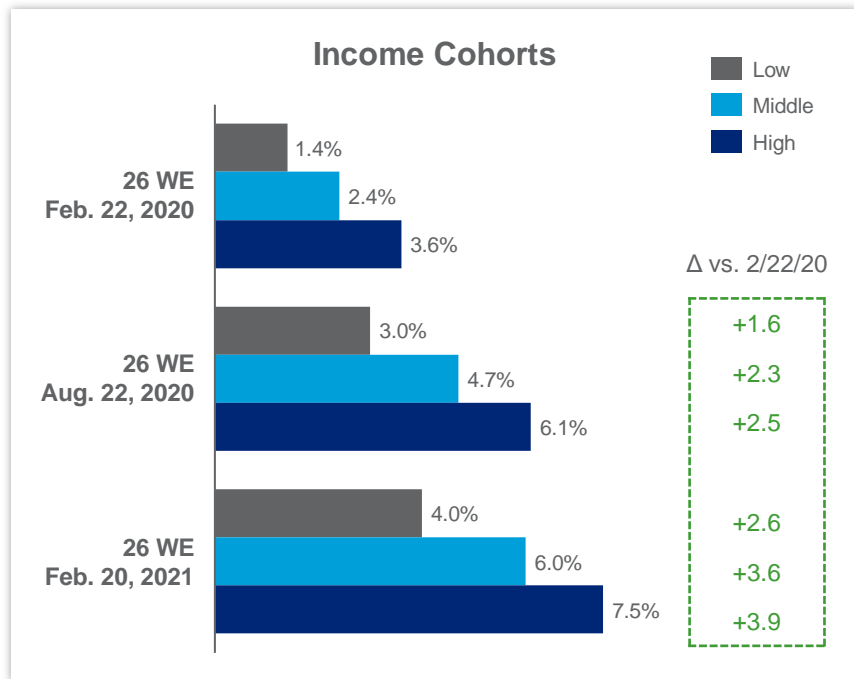
Walmart, Target, Costco, Kroger, Albertsons, Ahold Delhaize and Dollar General continue to invest aggressively in online grocery fulfillment capabilities and optimizing fulfillment costs.

Digital Share of CPG Omnichannel Sales and E-Commerce Performance



Shopper Adoption of E-Commerce Is Increasing, as Consumers Across Cohorts Shift to Online Grocery

Grocery Retailer A – Shopper Penetration by Income and Generation / % of Retailer Shoppers Buying in E-Commerce

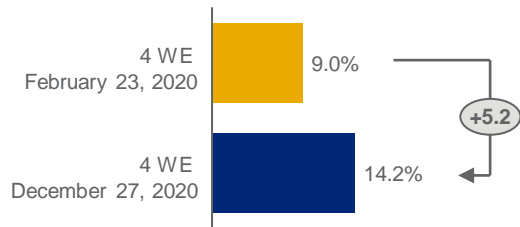


Low-Income Shoppers Also Migrate Online Due to Increased SNAP Online Availability and Retailer Efforts

E-Commerce Adoption Among SNAP Households

SNAP Households Account for 12% of F&B Sales and Increased Online Purchasing During COVID-19

% SNAP HH Purchasing F&B Online / Total U.S.



Retailers Expanded SNAP for Online Shopping

- Through the **SNAP online purchasing pilot**, **47 states now accept SNAP payments online** through retailers such as Amazon, Walmart, ShopRite, Aldi.
- In states where **Amazon Fresh** is available, **SNAP recipients can use the service without a Prime membership**.

Retailers Promote App Adoption for Pickup

SNAP HHs represent 28% of dollar channel sales & over index.

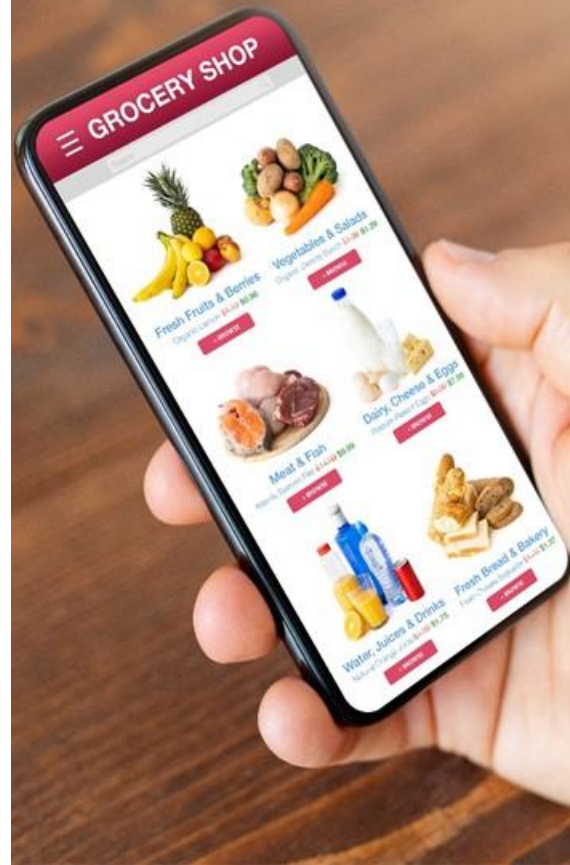
Launched in 2019, DG Pickup expanded to 17K stores in 2020; new online capabilities include shopping in-app to pick up at store, mobile checkout and digital coupons.



Order in the DG App.

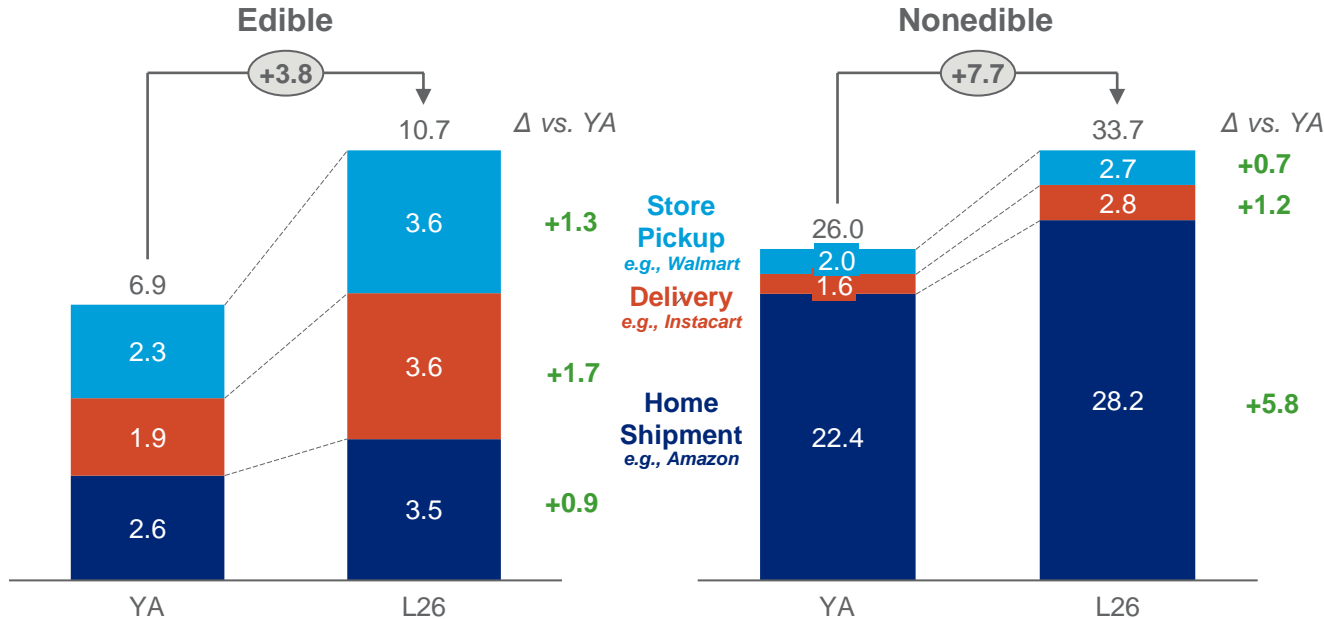


Pick up in store.



Store Pickup & Delivery Grew Significantly in the Last Year, Driving Adoption of Edible E-Commerce

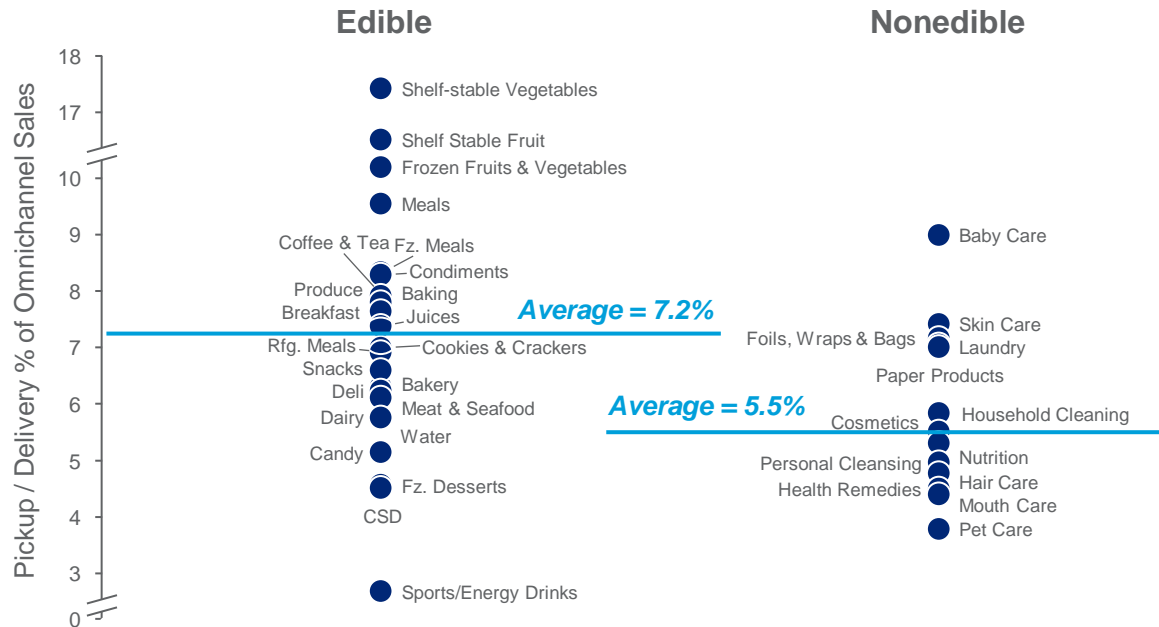
Store Pickup, Delivery and Home Shipment % \$ Share of Omnichannel / Latest 26 Weeks vs. YA



Adoption of nonedible e-commerce purchases accelerated via home shipment.

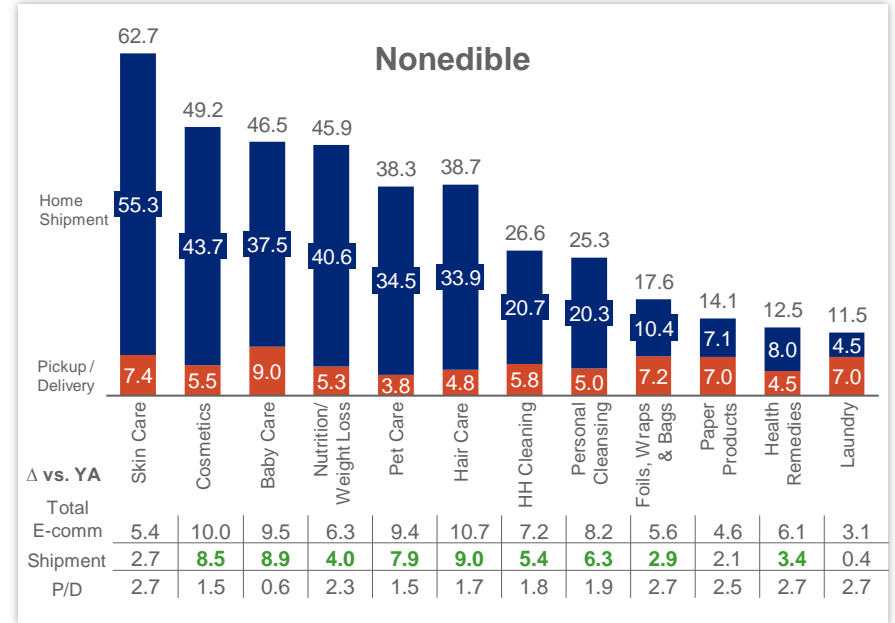
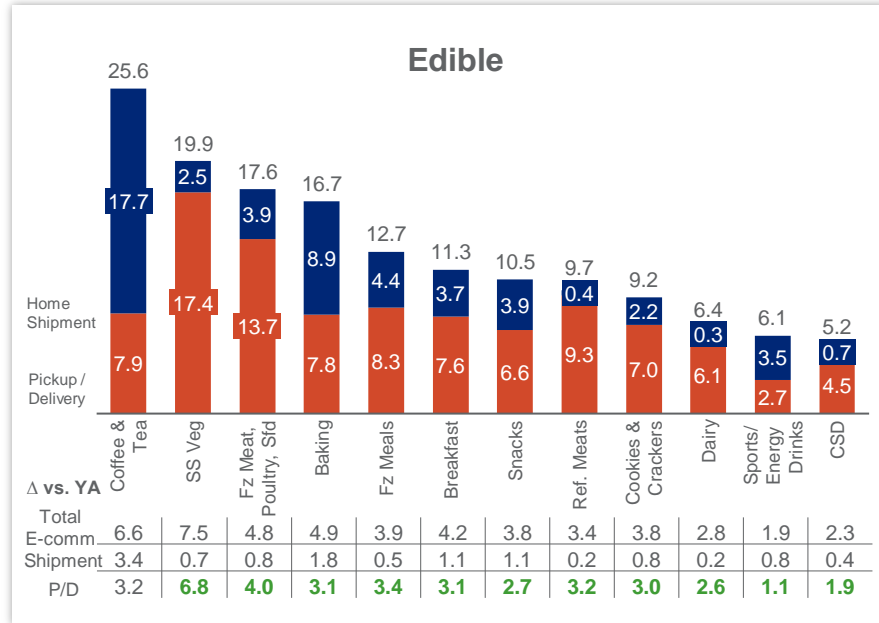
Comfort With Purchasing Food, Including Fresh, Is Increasing With Pickup & Delivery

% \$ Share of Category Purchased via Pickup / Delivery / Latest 26 Weeks



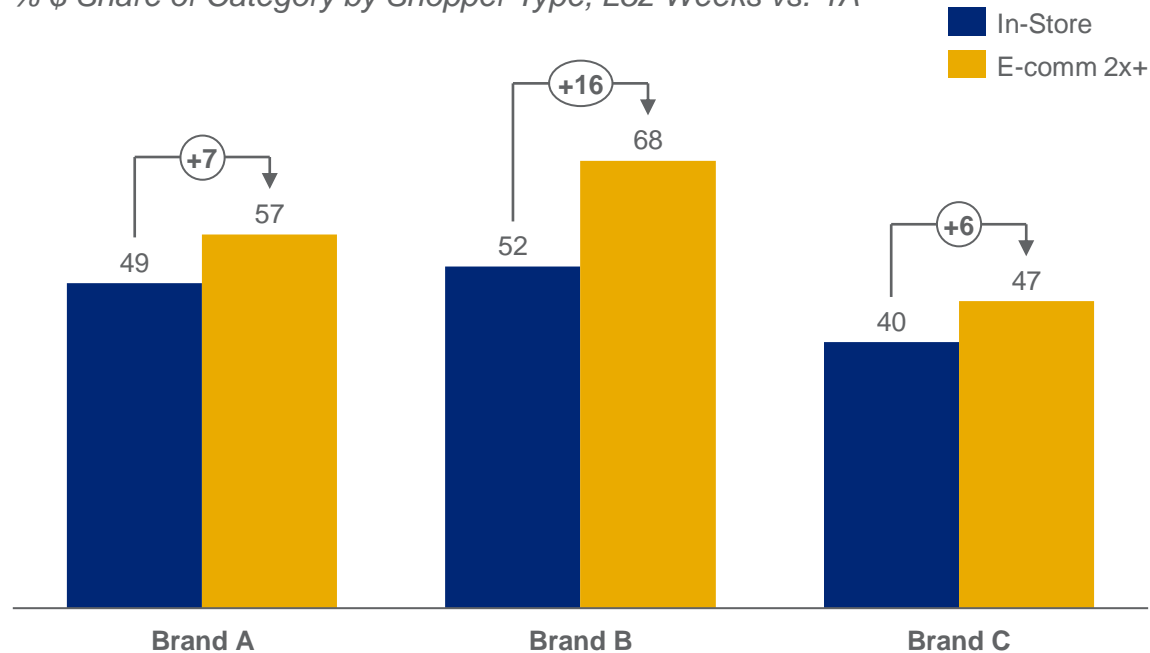
Edible Aisles Accelerate in Pickup & Delivery, Nonedible in Shipment

Home Shipment & Pickup / Delivery % \$ Share of Omnichannel Sales in Largest Aisles / Latest 26 Weeks



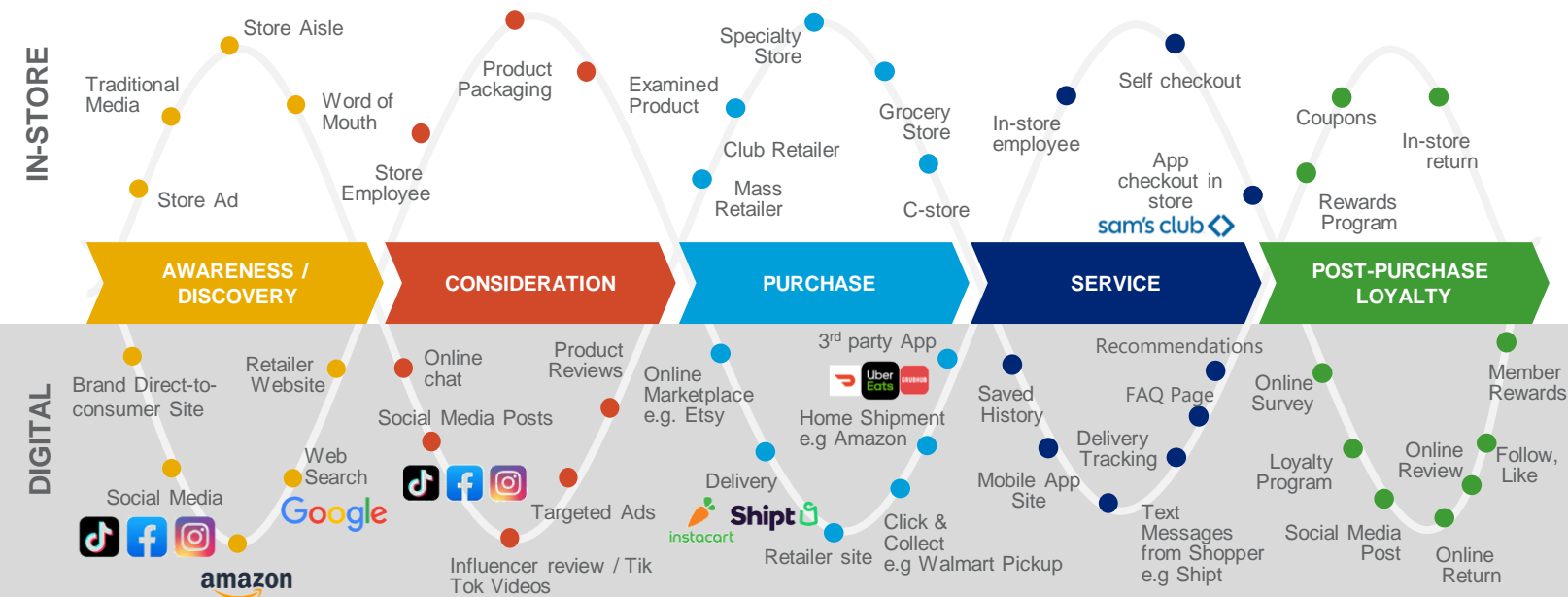
E-Commerce Shoppers Exhibit a Higher Loyalty to Their Brands Than Those Who Shop in Brick & Mortar

Grocery Retailer B – Brand Share of Wallet In-Store vs. Online
% \$ Share of Category by Shopper Type, L52 Weeks vs. YA



As the Shopper Journey Becomes More Intricate, Retailers and CPGs Must Establish Strong Digital Touch Points to Attract, Engage and Retain Shoppers

The consumer path to purchase is shifting toward digital discovery and purchase vs. in-store as consumers prioritize lower prices, faster purchasing, easy access customer service and better loyalty rewards.



OPPORTUNITIES

Invest in personalized and bundled offers and solutions (e.g., spring color collection selected for you vs. lip, eye, nail and cosmetics messages).

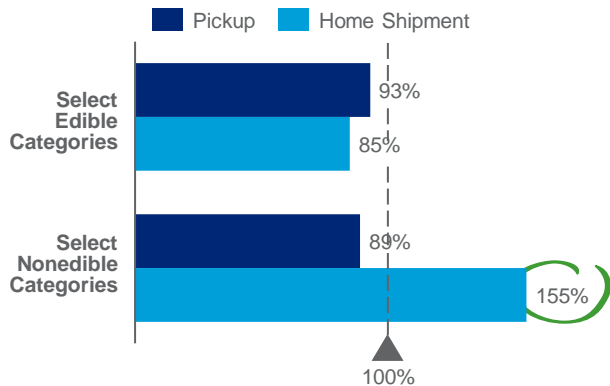
Target shoppers (e.g., based on purchase behavior) via paid search (e.g., sponsored results, product display ads), retail media networks, delivery/retailer apps.

Optimize digital content on product pages to drive shopper conversion.

In Most Cases, Shoppers Can Get Similar Assortment and Pricing Online vs. In-Store

Retailer C Online Assortment

In-Store vs. Pickup and Home Shipment Assortment Comparison



- Fulfillment challenges restrict assortment **~-10%** in pickup and delivery and **-15%** for edible in home shipment, with endless aisle for nonedible and shelf-stable grocery shipment
- In-store vs. first party pickup and delivery pricing is comparable. In some instances, online shoppers may not have the same in-store promotions.

Average Assortment by Category In-store, Pickup and Delivery Comparison

Category	In-store pickup vs. buy at store	Ship vs. buy at store
Soda and Pop	79%	9%
Sports Drinks	81%	9%
Frozen Meals	98%	0%
Ice Cream	98%	2%
Crackers	92%	78%
Ground Coffee	97%	227%
Pasta, Rice, Grains	96%	236%
Chips	88%	184%
Trail & Snack Mixes	95%	143%
Pancake Mixes	98%	148%
Toilet Paper	48%	110%
Hand Soap	96%	125%
Toothpaste	99%	154%
Dish Detergent	98%	138%
Cleaning Wipes	86%	118%
Dog Food	91%	207%
Cat Food	95%	207%
Multivitamins	97%	211%

Harder-to-ship categories have less assortment for home shipment

Endless aisles are evident in shelf-stable and nonedible categories

Opportunities



Retailers and manufacturers can offer special promotions and build experiences to drive in-store traffic.

Create online mega-shopper marketing events, particularly around key seasons (e.g., beer, soda, chips, hot dogs and condiments for Memorial Day parties).

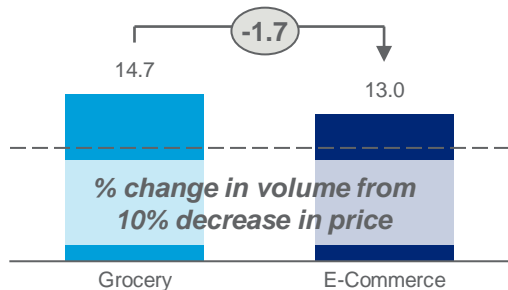
Offer and curate more premium products online.

E-commerce Shoppers Are Less Price Sensitive, a Segment of Shoppers Willing to Pay for Shopping Convenience

E-commerce Shopper Price Sensitivity

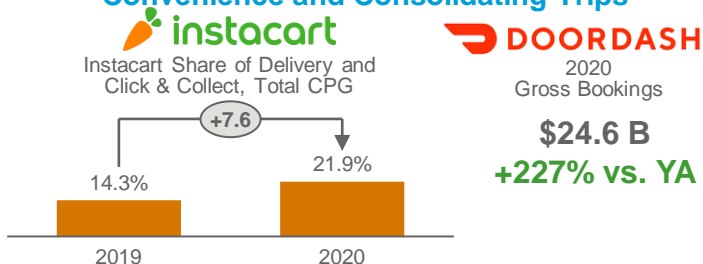
E-Commerce Shoppers Have Lower Price Sensitivity Compared to Grocery Channel

Impact of Everyday Price Change on Volume Grocery Channel vs. E-Commerce, Edible



Note: Price elasticity across products in 30 representative categories. E-commerce based on pure-play e-comm retailer. 26 weeks ending 10/6/19 vs. 26 weeks ending 10/4/20. Source: IRI Revenue Growth Management proprietary models.

Shoppers Are Willing to Pay Premium Prices, Delivery Fees, Membership Fees and Other Fees for Added Convenience and Consolidating Trips



Instacart Pricing¹: delivery up to \$9 for orders \$35+, free delivery with annual \$99 subscription; grocery retailers pay +10% per order average.

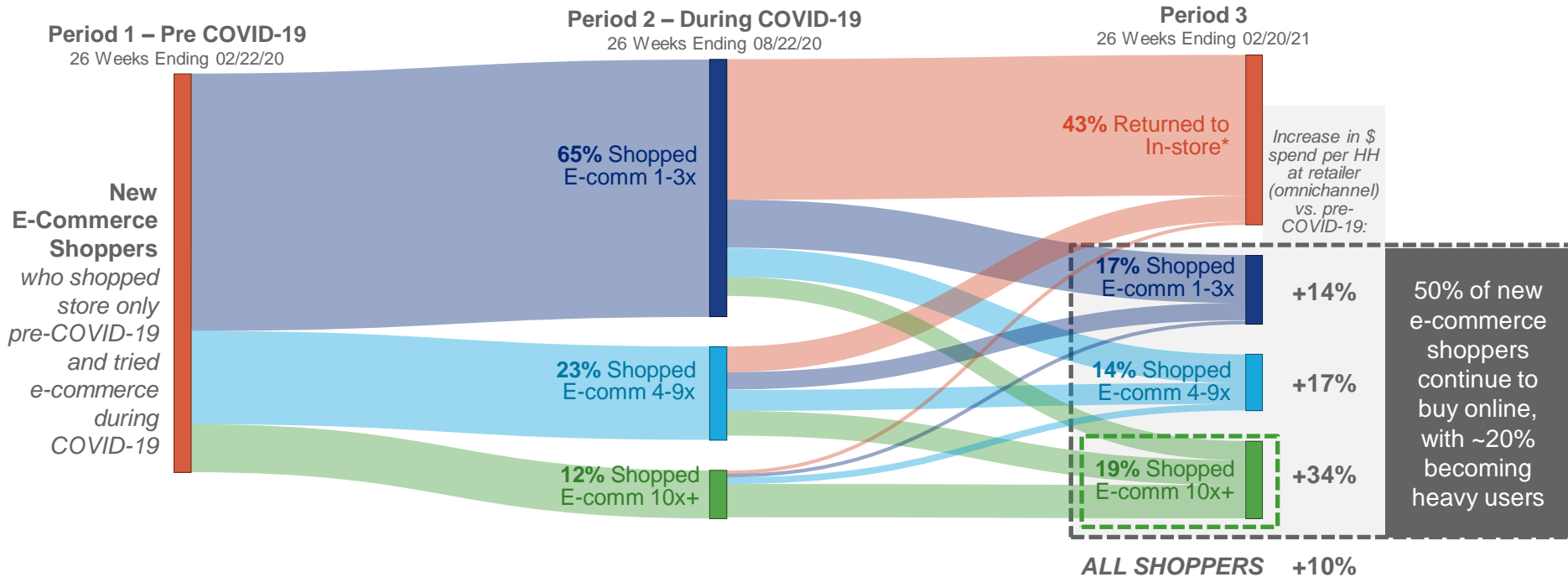
- Regional Grocer: **+15%** (incl. fees and 10% tip, consumers can expect +30% premium)
- Costco: **+25%** without membership / **+10%** with membership
- Drug Retailers: Items reflect average retail price in the area
- Generally, promotions, loyalty programs and discounts are not applicable

DoorDash Pricing:

- Commission: **-20%**
- Service Charges: **-10-15%** (mkt dependent)
- Delivery Charges: **\$5-\$8** per order
- Tip: **15-20%**
- Small Delivery Fee: **\$2.00** per order
- Dash Pass: **\$9.99** per month

For Retailers, Online Shoppers Become Valuable Heavy Shoppers

Grocery Retailer B – Shopper Migration for E-Commerce Shoppers During COVID-19



Winning the Omnichannel Shopper Drives Greater Share of Wallet to Retailers

Grocery Retailer A: Difference in Total Spend by Type of Shopper / Latest 26 Weeks vs. YA

	In-Store Only Shopper	Omnichannel Shopper	E-Commerce Only Shopper (likely 1-2 person HH, 65+)
% of Retail Spend	100% (In-Store)	29% (Online Average)	100% (Online)
% of Shoppers	94%	4.3%	1.7%
Growth in Spend vs. YA (Δ vs. In-Store)	12%	18% (+6ppts.)	8% (-4ppts.)
Source of Higher / Lower Spend vs. In-Store Shopper	N/A	Increases in most depts., except general merchandise	Gaps in most depts., particularly nonedible and impulse



*“Over time, omnichannel guests spend on average nearly 4x more than a store-only guest and nearly 10x more than a digital-only guest.”**









Note: Grocery retailer A offers pickup and delivery e-commerce services. *Target. Source: Grocery Retailer Shopper Loyalty Card Data, Tracked Households.

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Capturing Lost Impulse Shopping Can Increase the Value of Online Grocery Orders Up to 1%

Illustrative Impulse Categories / Pickup / Delivery Presence

Illustrative Impulse Categories		Omnichannel \$ Sales (B)	Pickup / Delivery % of Omni \$	Index to F&B Average
	Carbonated Beverages	\$33	4.5%	63
	Salty Snacks	\$31	5.5%	77
	Chocolate Candy	\$20	5.8%	81
	Energy Drinks	\$15	2.0%	28
	Non-Chocolate Candy	\$10	4.5%	63
	Sports Drinks	\$7	4.1%	57



Lost Impulse Opportunity
0.5-1.0%

of omnichannel edible sales at risk due to lost impulse on e-commerce.

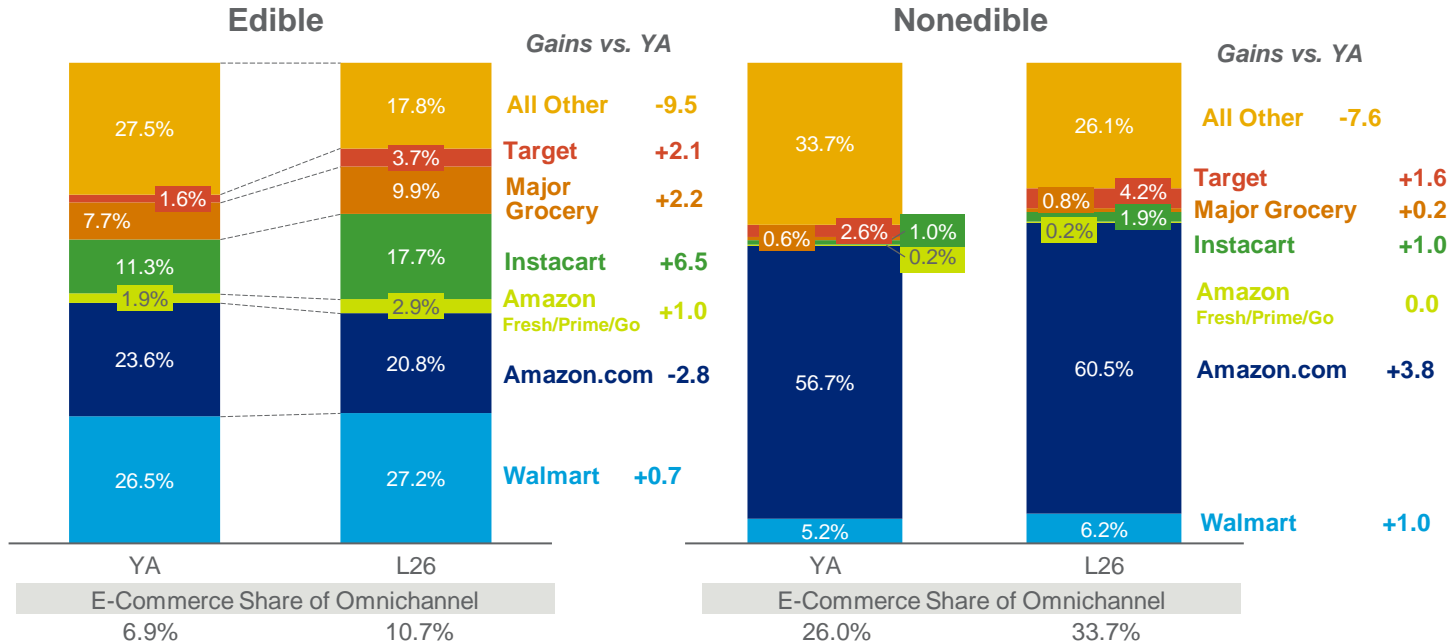


Opportunity

Manufacturers can partner with retailers to build baskets on e-commerce to further push underdeveloped impulse categories and realize the lost opportunity.

Shoppers Are Consolidating Purchases With Major E-Commerce Retailers; Disintermediation Likely By Delivery Services

Retailer \$ % Share of CPG E-Commerce / Latest 26 Weeks vs. YA



Retailer Opportunities



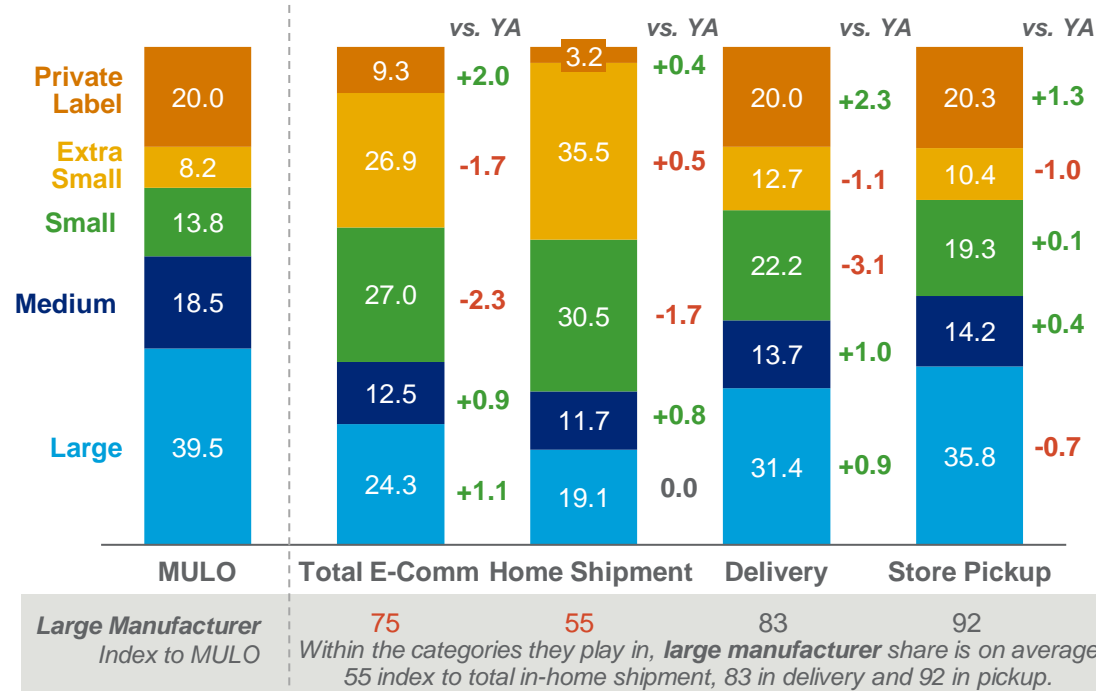
Increase flexible fulfillment capacity, e.g., via micro fulfillment.

Improve online profitability, e.g., process improvements, other revenue streams (media, marketplace).

Enhance customization / personalization and shopper engagement.

Growth of Pickup & Delivery Benefits Large Players, But Most Large CPGs Are Still Underdeveloped Online

Manufacturer Share of CPG Sales in E-Commerce Modalities vs. MULO / CY 2020



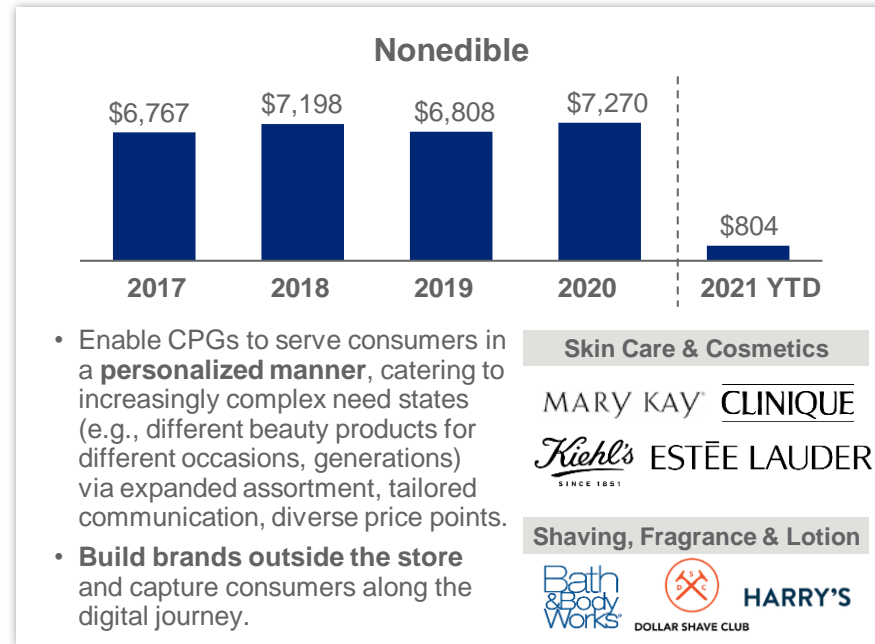
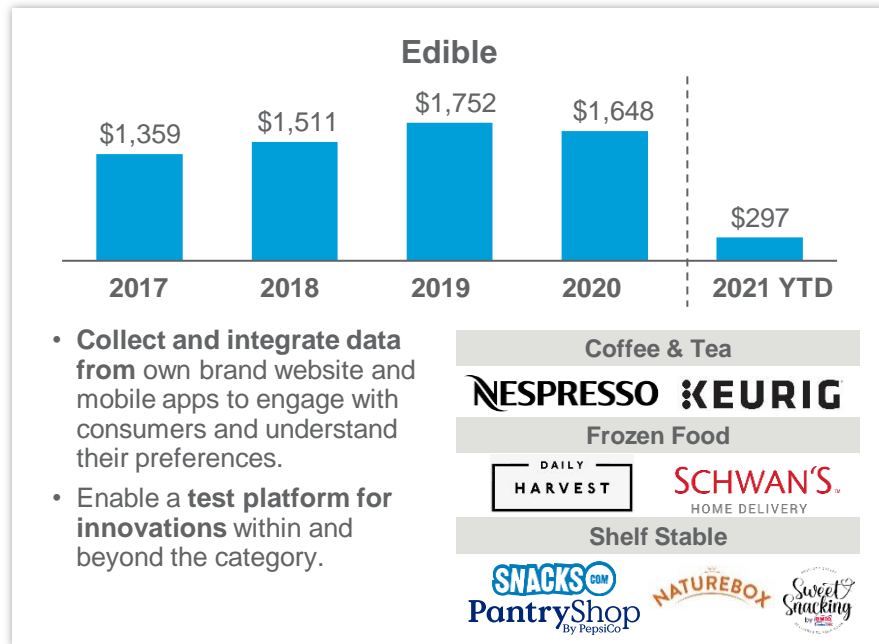
Instacart vs. first party services have similar manufacturer share. As pickup and delivery grow, large manufacturers will gain share in e-commerce.

Home shipment is a prime area for niche manufacturers.

Shoppers seem to purchase private label for pickup and delivery on par or slightly higher than in-store within the same retailer.

Direct-to-Consumer Sites Also Play a Role in Building Loyalty, Customization and Understanding Consumer Demands

Direct-to-Consumer \$ Share of E-Commerce (\$M, %), Largest Categories & Brands



Note: E-commerce data is based on projected receipt-based sample and reported data with varying levels of granularity and accuracy available.
Source: Growth Leaders Webinar Panel Discussion, IRI eMarket Insights, data ending 2/21/21. IRI analysis © 2021 Information Resources Inc. (IRI). Confidential and Proprietary.

Ben & Jerry's Pivoted Quickly to E-Commerce Investments

Categories ▾ Deals ▾ What's New ▾ Pickup & Delivery ▾ ice cream

You're shopping (closes at 10pm) Registry

Sweetness for your grocery list
Shop frozen desserts everyone loves.

The Ice Cream Shop
DashPass • Ice Cream • Newly Added • 0.9 mi • \$5

GRUBHUB UBER eats DOORDASH

\$0.00 Delivery fee 24-34 Minutes Group Order

Full Menu 12:00 am - 11:29 pm

Popular Items Build Your Own Bundle Ben & Jerry's Breyers

Popular Items
The most commonly ordered items and dishes from this store.

Ben & Jerry's Half Baked
A delectable dance of Chocolate Chip Cookie Dough and Chocolate Fudge... \$7.49

Ben & Jerry's Strawberry Cheesecake
Strawberry cheesecake ice cream with strawberries and a graham cracker swirl... \$7.49

Ben & Jerry's Tonight Dough
Caramel and chocolate ice creams with crunchy chocolate cookie swirls and gobs... \$7.49

Ben & Jerry's Americone Dream
Vanilla ice cream with fudge-covered wafer cone pieces and a caramel swirl. 16oz \$7.49

Featured on Target.com: 30% share of ice cream sales (vs. 13% in total market) gaining +3.5pts. vs. YA



New Products Appeal to Consumers Stuck at Home



Ben & Jerry's Pivots to Meet On-Demand At-Home Consumption With Delivery Apps

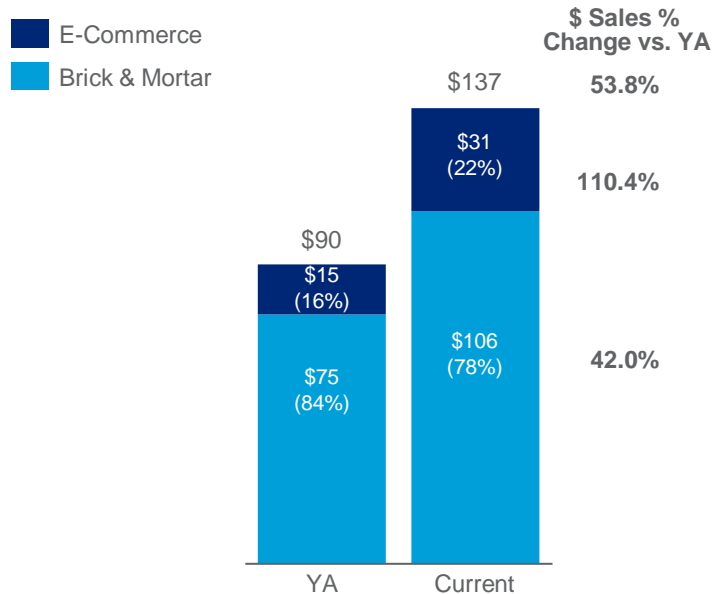
- Created “Ice Cream Shop” store via DoorDash, Uber Eats, and Grubhub to serve as unique provider vs. restaurants.
- Tripled collection points (e.g., added freezers in convenience and liquor stores), aiming to facilitate delivery within 30 minutes.
- Researching formulations less likely to melt and/or refreeze better.



Hint Shifts Its Direct-to-Consumer Success to Mainstream E-Commerce and Brick & Mortar

Hint In-Store and E-Commerce

(excluding drinkhint.com) Sales / \$M, 52 WE 02/21/2021 vs. YA



hint[®]
DRINK WATER, NOT SUGAR[®]

Launch driven by success through **drinkhint.com** (now 50%+ of sales) and **social media marketing**



Drinkhint.com

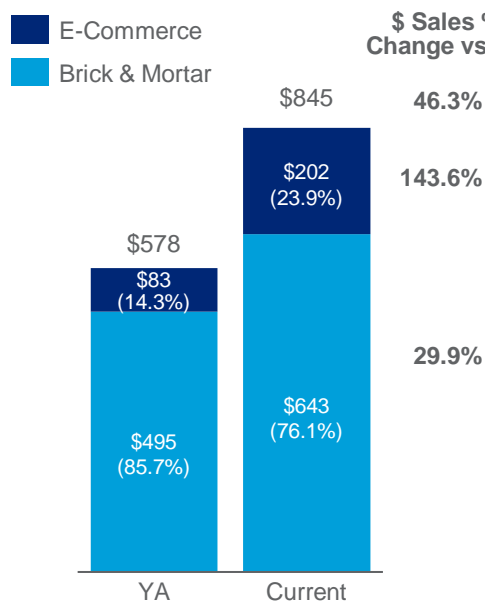
Subscriptions, Special Deals, Early Access to New Flavors, New Product Categories (e.g., Personal Care)

subscribe & save!
enjoy up to **20% off** every purchase
NO COMMITMENT. CANCEL ANYTIME.
+ FREE shipping on 3+ cases



Kiss Drives Growth Through Personalization via Its DTC Site and Increased Availability in Amazon and Mass Retailers

Kiss Omnichannel Sales and Category Share Performance
(excluding Kissusa.com) / \$ Sales (MM), 52 WE 02/21/2021 vs. YA



Channel / Retailer	Kiss \$ Share of Cosmetics ¹	Share PPT Change
Omnichannel	8.8%	+2.2
B&M	12.7%	+3.7
E-commerce	3.9%	+1.8
Amazon.com	6.6%	+2.6
Walmart	6.8%	+1.9
Target	4.9%	+2.3
Instacart	5.2%	+3.5
Major Grocery	1.7%	+1.0

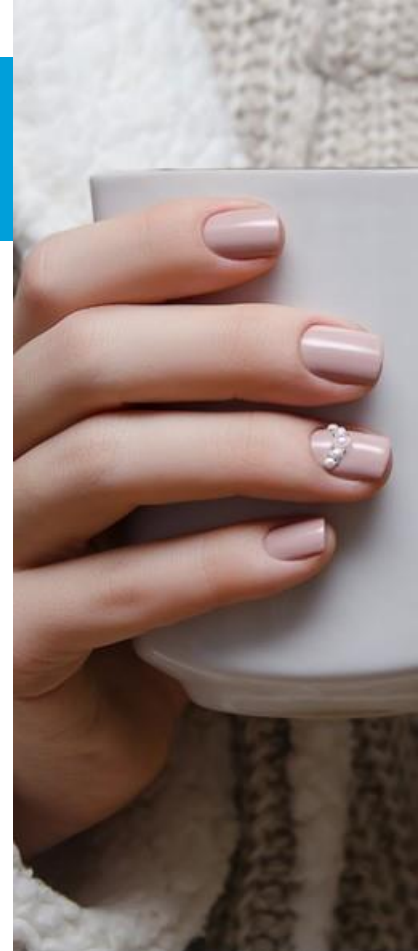
1. Cosmetics include Nail, Eye and Accessories

Bring the Salon Home
KISS[®]

Direct-to-consumer site enables **personalization** and expanding consumer base

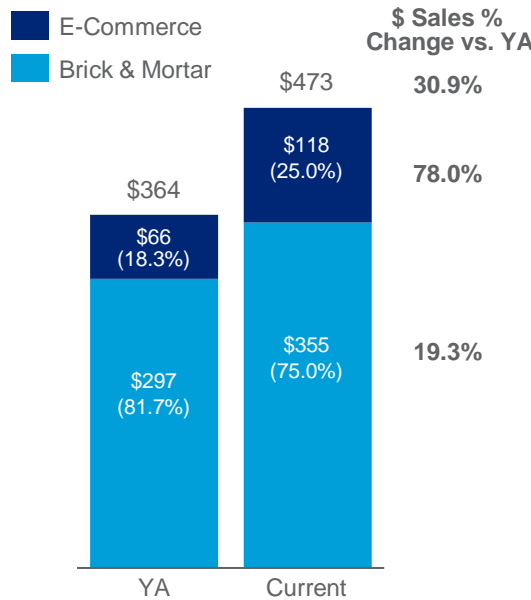


Target.com features imPress on its “at-home beauty page,” encouraging product discovery for consumers looking to bring the salon experience in home.



Shea Moisture's E-Commerce Success is Due to Optimized Product Pages, Curated Content Engaging With Consumers, Expanded Product Availability

Shea Moisture Omnichannel Sales and Category Share Performance
(excluding Sheamoisture.com) / \$M 52 WE 02-21-2021 vs. YA



Channel / Retailer	Shea \$ Share of Hair Care ¹	Share PPT Change
Omnichannel	2.8%	+0.7
B&M	3.3%	+0.9
E-commerce	1.7%	+0.4
Amazon.com	1.8%	+0.5
Walmart	1.6%	+0.2
Target	6.0%	0.0
Instacart	3.3%	+1.9
Major Grocery	1.3%	+0.4

1. Hair Care includes Shampoo, Conditioner, Hair Styling



Shorter Path to Purchase and Ease of Discovery vs. Competitive Brands

2 to 3 clicks from Google search to "add to cart" vs. other competitors that require more than 4 clicks.

Optimized Product Page Content

Descriptions highlight natural and sustainably sourced ingredients.

Empowering, Engaging Website and Social Media Video Content

SheaMoisture TV with product "how to" tutorials and #Mystorymynpower stories.

Social Impact Through a Program That Invests Proceeds From Every Purchase Into the Community



Note: E-commerce data is based on projected receipt-based sample and reported data with varying levels of granularity and accuracy available. Source: IRI Omnichannel Model, eMarket Insights. 52 WE 12/27/20. Brand Website, IRI analysis.

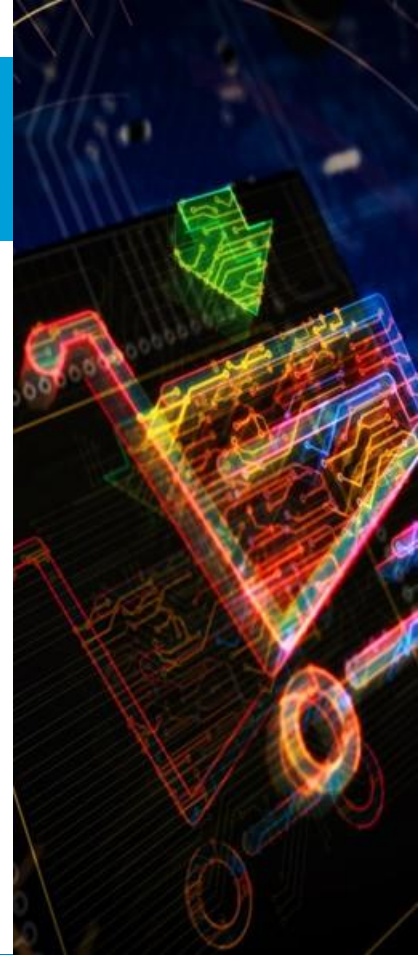
Target is Winning via a Physical Store-Centric Omnichannel Platform

- ~1,900 Target stores pull their weight as show rooms, service centers and a hub for digital fulfillment.
- Suite of same-day fulfillment for digital orders from store inventory handling 95% of sales:
 - In-Store Pickup
 - Drive-Up
 - Same-Day Delivery Shipt
 - Shipped to Home from Store Inventory
- Costs 90% less than shipping from a warehouse*
- Drive-up +600%*
- Shipt +300%*



Results

- 145% digital growth, 18% digital penetration in FY 2020
- CPG market share gain of ~+0.25% in FY 2020
- 2021 YTD highest in-store CPG trip growth ~18%, more than 2x of any other CPG retailers



Retailer Implications

Continue to **invest with speed** in digital capabilities and commerce to gain **omnichannel** share.

Consider driving more **pricing online** for convenience, variety, and unique products, in addition to looking to optimize fulfillment costs and enhance media advertising to drive profitability.

Segment omnichannel users to **target products, solutions and services, to meet a variety of consumer needs.** Particularly with **SNAP shoppers, online price / pack assortment** should be a priority.

Build unique **in-store and online experiences to drive traffic;** encourage discovery, impulse and occasion-based purchases (e.g., bundled solutions for holidays and events, including Independence Day celebrations with packaged snacks, beverage alcohol, hot dogs, condiments and more).



Manufacturer Implications

Improve online channel profitability via careful **revenue management** with price / mix and unique assortment; monitor competitive price position across online and in-store channels.

Track and **optimize digital marketing** and digital trade / shopper spend in real-time against most responsive digital properties (e.g., retail media networks, walled gardens, delivery apps, etc.).



Track and balance **marketing and promotion in-store and online** to greatest returns.

Optimize omnichannel **supply chain** to reduce shipping and warehouse costs. Work with retailers to **forecast and meet consumer demand.**

Prioritize **investments with top retailers** in-store and online. Earn your spot on shopping lists, which are often repeated. For impulse items, leverage “buy again” and automated recommendations to drive purchase.

Leverage **direct-to-consumer** sites to drive loyalty and gain inputs to consumer tastes.

Inroads made by small manufacturers is a **call to action** for larger players that risk longer-term omnichannel loss, particularly in e-commerce, where brand loyalty is higher. **Consider investments in online, social and direct to consumer.**

IRI Offers Solutions and Services to Help Brands and Retailers Grow E-Commerce Initiatives

eMarket Insights

- Provides online sales and share information for a holistic view of the digital marketplace and shopper journey
- Capitalizes on e-commerce as both a sales channel and a powerful marketing tool
- Compares online and in-store sales data to understand purchase dynamics of key shopper segments

eCapability Development

- Benchmarks current e-commerce capabilities against leading and lagging competitors within the same category or department
- Prioritizes capability investments where they will drive true differentiation or close critical gaps
- Builds a quantified business case to strengthen specific e-commerce capabilities

Online Demand Analytics

- Calculates e-commerce- specific price elasticity and assortment incrementality for refining online pricing and assortment
- Assesses pricing leverage and portfolio gaps vs. traditional brick-and-mortar shopping, to refine offering sets
- Identifies points of differentiation in the online space to mitigate cross-channel cannibalization

Action and Impact

Identifies how shoppers are behaving online to know where to invest to drive incremental growth of tens of millions of dollars

Drives the most effective and efficient capability build, often saving tens of millions of dollars in achieving e-commerce potential

Builds significant online market share in what is often the fastest growing channel while also gaining 2-5% in margins

IRI Offers Solutions and Services to Help Brands and Retailers Grow E-Commerce Initiatives

CONTINUED



Omnichannel Strategy

- Sets a specific role and growth strategy for online vs. traditional brick-and-mortar channels, to meet different needs and occasions
- Shifts e-commerce from cannibalizing traditional channels to expanding shopper footprint
- Pre-empts competitive growth in e-commerce, maintaining and strengthening overall share

E-Commerce Portfolio

- Overhauls existing offerings to build a differentiated online assortment, meeting unique demand occasions and required price points
- Introduces new items, pack sizes, and deals better tailored to the online shopper, specific to each brand
- Builds pricing leverage in a channel known for the ease of cross-shopping and price comparisons

IRI Audiences

- Activate E-Comm ProScores across advertising ecosystem to reach households likely to purchase CPG products online.
- Identify and activate publishers, platforms, networks, dayparts, etc. where online purchases engage with media.
- Highlight attributes and craft messaging that resonates and prompts action.

Action and Impact

Avoids up to 50% of cross-channel cannibalization while driving stronger loyalty and repeat purchases across online channels

Grows online sales by as much as 3x, while also increasing margins and reducing cross-channel cannibalization

Reach high-propensity shoppers at scale, deliver 50%+ higher return on ad spend vs. competitive purchase-based targets

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](#)



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C-SUITE CONVERSATIONS



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Mark Clouse

President and CEO, Campbell Soup Company
November 10, 2020



Watch Now

Stuart Aitken

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



Watch Now

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)*

The Changing Shape of the CPG Demand Curve



14. Vitamins, Minerals, Supplements
13. America Is Ready for Football
12. Revenue Management Opportunities in a Pandemic
11. Home for the Holidays
10. Powering the Future of Convenience Retail
9. Reignite In-Store Merchandising in Grocery
8. SNAP Benefits
7. U.S. CPG Growth Leaders
6. E-Commerce
5. Boomers
4. A Global Perspective
3. Tracking Transformation
2. Meat and Millennials
1. Anticipate the Future

Discovering Pockets of Demand



3. Innovation for a Post-Pandemic World
2. Harness Growth in 2021
1. The Premium Opportunity

COVID-19 Emerging Point of View



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

Recession Proof Your Business



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

IRI COVID-19 Impact Assessment Reports

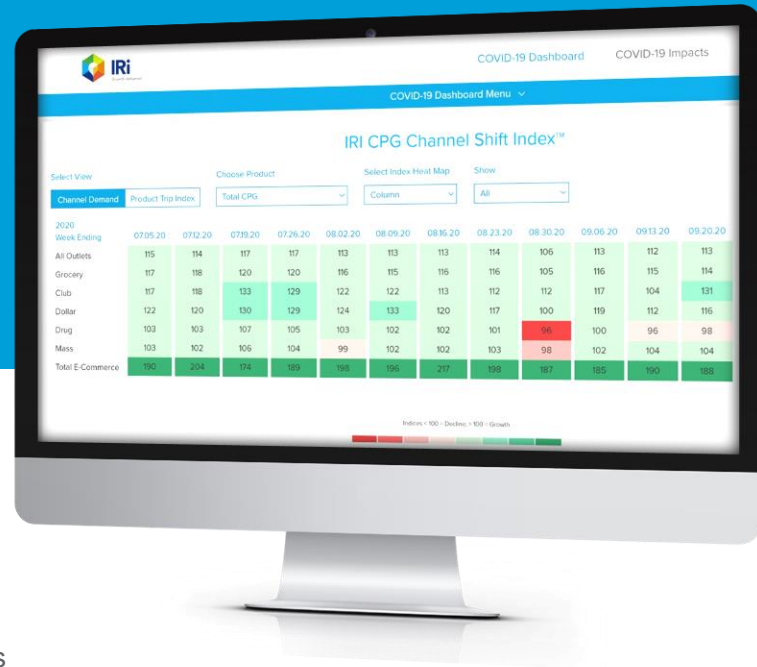


5. Anticipating Life After COVID-19
4. Consumers Provide a Pessimistic View of Coming Months
3. Tracking the Dramatic Pivot of U.S. Consumer and Shopper Behavior
2. Then and Now: Consumer CPG Behavior During Economic Downturns
1. COVID-19: Impact on CPG and Retail

CPG Economic Indicators

Access IRI's industry-standard metrics for consumer product demand and supply during the pandemic, our CPG inflation tracker and the latest data on category trends, out-of-stock levels, consumer sentiment and more.

Demand Index™	U.S. Demand Index™ Forecasts	Channel Shift Index™	E-Commerce Demand Index™
Inflation Tracker™	Supply Index™	Out-of-Stock Levels for Subcategories	U.S. Topics from IRI Social Pulse™



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.

Top U.S. Topics from IRI Social Pulse™



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CONTACT US FOR MORE INFORMATION

IRI Global Headquarters

203 N. LaSalle St., Suite 1500

Chicago, IL 60601

IRI@IRIworldwide.com

+1 312.726.1221

Follow IRI on Twitter: @IRIworldwide