

Bakery and Deli Sales Move into Positive Growth Territory

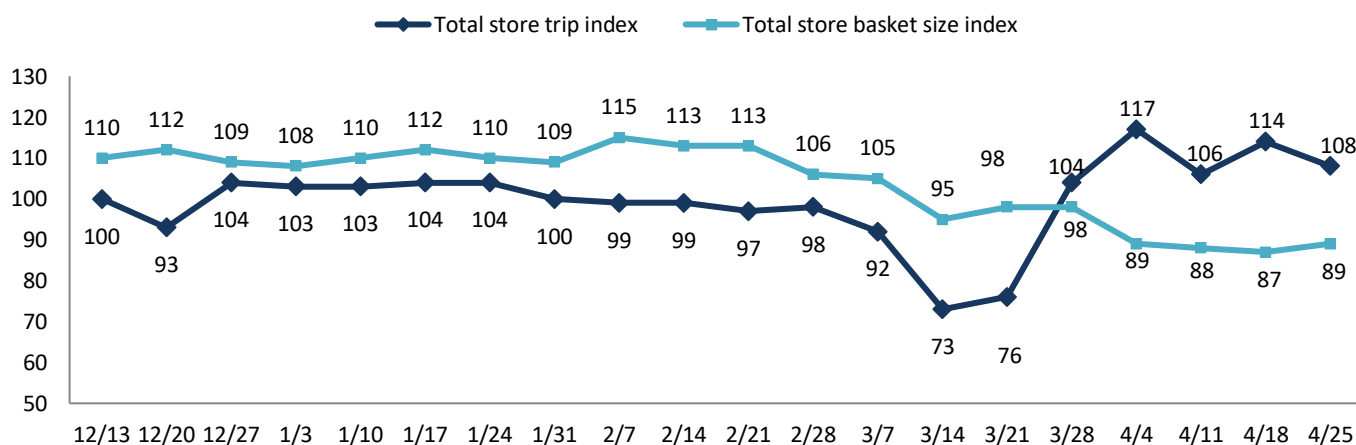
By: Anne-Marie Roerink, President, 210 Analytics LLC

Shoppers increasingly shop in person as COVID-19 concerns abate. “While grocery e-commerce certainly remains elevated from the pre-pandemic levels at around 11% of consumers doing some or all grocery shopping online, we saw an increase in in-store shopping along with more time spent shopping in April,” said Jonna Parker, Team Lead, Fresh for IRI. Referring to the April wave of the consumer survey with primary grocery shoppers Parker added, “Reflecting on their last grocery trip, 85% of consumers shopped in-store, up a few points versus the last three months. Additionally, 68% now say they will do all of their grocery shopping in-store, up four points versus last month.” The better COVID-19 outlook appears to be directly related to the return to in-store shopping. “Concern about COVID-19 dropped month over month and 66% of shoppers felt relaxed during their last in-store trip, up 13 points since January. Importantly, consumers who have been vaccinated are more likely to do all shopping in-store and are the ones driving the more relaxed in-store mindset. This points to potentially ongoing shifts back to pre-pandemic behaviors as more people get vaccinated,” said Parker.

Trips and Basket Size

April 2020 experienced highly elevated sales as most states had issued shelter-in-place mandates — moving the vast majority of meal occasions to at-home. During this time, trips fell far below year-ago levels whereas the average basket ring came in well ahead of the pre-pandemic normal. That means one year later, trips sit well above year ago, though much in line with typical years, while the average basket size dropped well below that of April 2020.

Total CPG trip and basket size index across all outlets



Source: IRI, Household panel, Total US, All outlets

“The story of April 2021 is a continuation of what we saw in March,” said Jeremy Johnson, VP of Education for IDDBA. “Everything that had seen strong gains throughout 2020 and the first quarter of 2021 saw year-over-year sales turn negative. And the two areas that struggled amid the pandemic patterns, in-store bakery and deli prepared, turned positive. That said, meal occasions continue to be more home-centric than normal and most departments are experiencing sales at levels far above the 2019 pre-pandemic averages. Tracking where demand lies versus the 2019 baseline is an important exercise for demand forecasting as few retailers and brands will be able to stay on pace with the 2020 results. Additionally, consumers are re-engaging with restaurants for everyday and holiday meal occasions, which is likely cause a shift in the supply chain balance between food retail and foodservice.”

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Perimeter Performance

A look across fresh foods departments for the four weeks ending April 25, 2021 versus year ago shows mixed performance. Seafood sales remain incredibly strong, up 26.5% against 2019 and 11.5% versus year ago. Bakery and deli also moved into positive territory as they are now going up against the time when many deli and bakery service counters and self-serve displays were closed during the early weeks of the pandemic. However, the powerhouses of 2020, meat and produce, were unable to come close to year ago levels.

April 2021 (4 weeks ending 4/4 through 4/25/2021)	\$ sales	Dollar sales gains vs. 2019	Dollar sales gains vs. 2020
Bakery	\$2.7B	+8.5%	+1.8%
Deli (meat, cheese and deli prepared)	\$3.0B	+10.4%	+22.2%
Meat	\$6.0B	+15.4%	-14.8%
Produce	\$5.4B	+10.6%	-3.6%
Seafood	\$552M	+26.5%	+11.5%

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

Dairy

“The first week in April, Easter week, was the strongest so far in 2021,” said Eric Richard, Industry Relations Coordinator with IDDBA. “In the year-over-year view, sales turned negative, but that was to be expected. Very early on in the pandemic, sales for milk, cheese, eggs, etc. spiked to unprecedented heights so it is hardly surprising to see that 2021 sales could not keep pace. Importantly, demand remains ahead of the 2019 pre-pandemic normal for three out of the four weeks. April is a hard month to track with the Easter holiday having moved from April 21 in 2019 to April 12 in 2020 and April 4 this year.”

Dairy	Dollar sales	Dollar gains vs. 2019	Dollar gains vs. 2020
w.e. 4/4/2021	\$1.224B	+18.7%	-9.4%
w.e. 4/11/2021	\$1.070B	+3.3%	-22.2%
w.e. 4/18/2021	\$1.101B	-1.7%	-14.3%
w.e. 4/25/2021	\$1.098B	+17.7%	-13.7%

Dairy sales for the four April weeks totaled \$4.5 billion, which was unchanged from March. Likewise, at +9.0% versus 2019, demand is holding steady with the fourth quarter of 2020 and the first quarter of 2021. Milk continued to sell more than \$1 billion in the four-week period, which was an increase of 6.9% versus the 2019 baseline, but a decrease of 11.7% year-over-year. This picture was very similar for all areas within dairy, with the exceptions of butter/margarine and cottage cheese that fell below 2019 levels. Only yogurt advanced year-over-year sales in April, at +4.6%. Yogurt was a steady performer, but never saw the sales spikes recorded by milk, cheese and eggs. Yogurt saw a decline in single-serve items, while larger containers tracked ahead.

Current dollar sales vs the same time period year ago									
	2019	Q1 '20	Q2 '20	Q3 '20	Q4 '20	Q1 '21	Apr '21	Apr vs '19	Apr vs '20
Dairy	+0.2%	+11.7%	+21.5%	+11.9%	+9.0%	+	\$4.5B	+9.0%	-15.0%
Milk	+0.7%	+11.3%	+14.1%	+8.7%	+6.9%	+	\$1.1B	+6.9%	-11.7%
Natural cheese	+2.1%	+17.1%	+31.3%	+17.4%	+14.0%	+	\$856M	+15.6%	-17.9%
Yogurt	-0.5%	+4.2%	+2.4%	+3.5%	+4.6%	+	\$613M	+5.2%	+4.6%
Eggs	-10.3%	+7.7%	+38.4%	+16.6%	+9.5%	+	\$509M	+8.8%	-26.8%
Cream/creamers	+7.7%	+11.3%	+21.2%	+14.8%	+12.7%	+	\$359M	+17.6%	-6.4%
Butter/margarine	+1.4%	+19.3%	+35.1%	+12.5%	+5.0%	+	\$332M	-2.7%	-32.9%
Processed cheese	-3.0%	+20.7%	+24.9%	+12.3%	+9.5%	+	\$169M	+7.7%	-24.4%
Cream cheese	+3.8%	+15.7%	+28.4%	+19.9%	+12.1%	+	\$152M	+14.9%	-13.9%
Sour cream	+0.2%	+10.6%	+28.2%	+12.6%	+5.8%	+	\$98M	+6.5%	-22.7%
Whipped toppings	+9.4%	+10.1%	+34.2%	+24.1%	+18.5%	+	\$106M	+21.0%	-10.6%
Cottage cheese	-3.1%	+2.0%	+8.7%	+4.5%	+5.0%	+	\$85.5M	-2.2%	-10.8%

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

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In the year-over-year look, dollars, units and volume sales trended below 2020 levels for virtually all dairy categories, as could be expected. The slight inflation seen throughout pandemic is turning dollar sales slightly more negative than volume for most areas. Milk is the notable exception, with a 4.1% increase in the average price per volume in April 2021 versus year ago.

April 2021	\$ gains	Unit sales	Volume gains
Dairy	-15.0%	-11.9%	---
Milk	-11.7%	-10.9%	-15.2%
Natural cheese	-17.9%	-16.9%	-17.5%
Yogurt	+4.6%	+3.8%	+3.8%
Eggs	-26.8%	-19.1%	---
Cream/creamers	-6.4%	-5.6%	-4.6%
Butter/margarine	-32.9%	-29.7%	-27.6%
Processed cheese	-24.4%	-25.6%	-24.3%
Cream cheese	-13.9%	-15.2%	-14.4%
Sour cream	-22.7%	-21.8%	-22.3%
Whipped toppings	-10.6%	-8.4%	-7.1%
Cottage cheese	-10.8%	-6.0%	-9.8%
Refrigerated desserts	+25.4%	+17.9%	+13.1%
Cheese snack kits	+20.1%	+27.1%	+27.1%

“The strong results in cheese snack kits are a reflecting of consumers moving around more,” said Richard. “On-the-go and entertaining items tended to have a much weaker performance thus far in the pandemic, whether cheese snack kits, value-added fruit or individual serving yogurt containers. Sales for cheese snack kits are still down 13% versus the 2019 pre-pandemic baseline, but it will be interesting to see whether demand will continue to strengthen in the next few months.”

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

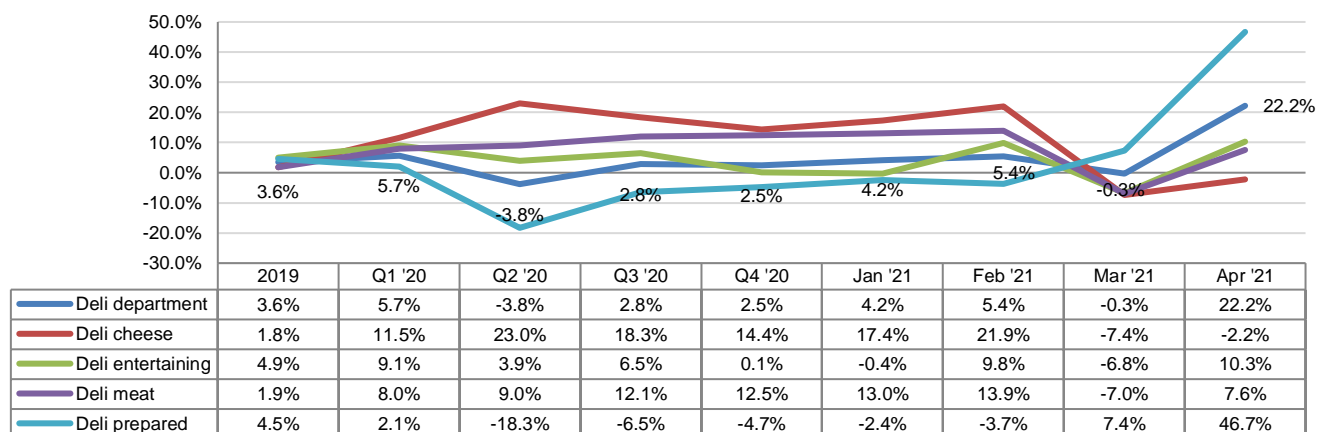
Deli

“The deli department is the compilation of cheese, meat and prepared foods. From the very start of the pandemic, its performance was a story of two tales,” said Angela Bozo, Education Director with IDDBA. “Cheese and meat, whether packaged in the refrigerated area or deli, have had a tremendous year. In contrast, deli-prepared struggled once shelter-in-place mandates ensued. While prepared foods made a big comeback, sales never quite got back to pre-pandemic levels. A year later, this means deli prepared has an easier time in going up against year ago levels than meat and cheese. This pulled up the results for the entire department, particularly Easter week.”

Deli	Dollar sales	Dollar gains vs. 2019	Dollar gains vs. 2020
w.e. 4/4/2021	\$775.4M	+12.5%	+24.5%
w.e. 4/11/2021	\$725.9M	+4.2%	+19.5%
w.e. 4/18/2021	\$757.2M	+7.7%	+25.5%
w.e. 4/25/2021	\$754.9M	+18.2%	+19.3%

Deli prepared food sales accelerated from +7.4% in March to +46.7% in April over year ago levels. Deli entertaining had a strong month also with Easter gatherings being slightly bigger than last year, according to the IRI survey. Deli cheese lost a little ground, again likely due to a shifted Easter, but deli meat did well.

\$ sales growth vs. year ago deli department



Source: IRI, Total US Integrated Fresh, MULO, 1 month % growth versus year ago

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Deli Meat

Deli meat sales (combined fixed and random weight) totaled \$560 million in the four April 2021 weeks, which was down about \$10 million from \$569 million in March 2021.

Total Deli Meat (FW/RW)	Current sales vs 2019 and 2020								
	2019	Q1 '20	Q2 '20	Q3 '20	Q4 '20	Q1 '21	Apr '21	Apr vs '19	Apr vs '20
Dollars	+1.9%	+8.0%	+9.0%	+12.1%	+12.5%	+6.4%	\$560M	+16.4%	+7.6%
Volume	-0.1%	+4.8%	+3.9%	+6.0%	+7.3%	+2.4%	63M	+4.4%	+6.9%

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, plus continued to track ahead of year-ago levels in April 2021. All three areas were up against year ago, demonstrating service cut-to-order is making a comeback also.

Total Deli Meat (FW/RW)	Current sales vs 2019 and 2020								
	2019	Q1 '20	Q2 '20	Q3 '20	Q4 '20	Q1 '21	Apr '21	Apr vs '19	Apr vs '20
Grab & go	+24.5%	+35.2%	+72.4%	+56.9%	+55.9%	+38.9%	\$150M	+90.9%	+4.2%
Pre-sliced	+5.1%	+12.6%	+27.0%	+23.7%	+18.6%	+13.2%	\$57M	+31.4%	+8.6%
Service	-2.6%	+1.7%	-7.7%	-0.3%	+0.6%	-3.6%	\$353M	-1.7%	+8.9%

Packaged lunchmeat had a huge April 2020, which resulted in significant year-over-year declines come 2021. However, when compared to the pre-pandemic 2019 baseline, dollars were up and volume was flat.

Meat dept packaged lunchmeat (excludes Deli)	Current sales vs 2019 and 2020								
	2019	Q1 '20	Q2 '20	Q3 '20	Q4 '20	Q1 '21	Apr '21	Apr vs '19	Apr vs '20
Dollars	-0.6%	+13.3%	+11.4%	+5.4%	+9.8%	-5.1%	\$402M	+6.2%	-11.5%
Volume	-2.0%	+11.0%	+4.9%	-1.1%	+3.7%	-9.1%	83M	+0.0%	-12.2%

Source: IRI, Total US Integrated Fresh, MULO, % growth versus 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								
	2019	Q1 '20	Q2 '20	Q3 '20	Q4 '20	Q1 '21	Apr '21	Apr vs '19	Apr vs '20
Dollars	+1.8%	+11.5%	+23.0%	+18.3%	+14.4%	+9.9%	\$589M	+20.5%	-2.2%
Volume	+0.5%	+8.8%	+19.0%	+13.4%	+9.9%	+5.4%	77M	+11.9%	-6.6%

Grab & go, pre-sliced and specialty deli cheese showed year-over-year declines in April, 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 +23.8%. In fact, April sales, at \$367 million were slightly higher than March.

Total Deli Cheese (FW/RW)	Current sales vs 2019 and 2020								
	2019	Q1 '20	Q2 '20	Q3 '20	Q4 '20	Q1 '21	Apr '21	Apr vs '19	Apr vs '20
Grab & go	+8.0%	+19.5%	+45.6%	+31.5%	+24.6%	+15.1%	\$84M	+38.2%	-9.3%
Pre-sliced	-2.1%	+12.8%	+25.7%	+18.9%	+14.8%	+5.4%	\$47M	+20.0%	-4.4%
Service	-1.6%	+7.0%	-3.3%	-0.9%	-0.3%	-6.2%	\$92M	-1.4%	+2.3%
Specialty	+2.2%	+11.2%	+26.3%	+21.6%	+16.5%	+14.3%	\$367M	+23.8%	-1.2%

Source: IRI, Total US, MULO, Integrated Fresh % growth versus year ago, Deli Cheese includes known deli products based on IRI's Integrated Fresh research process powered in cooperation with IDDBA

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Deli-Prepared Foods

Because of the down performance in April 2020, deli prepared and, to an extent, deli entertaining, had a strong month this year. "Holiday meals had a big March because of the earlier Easter this year but sales in April continued to pace well ahead of year ago levels," said IRI's Parker. "Holiday meal solutions are small but mighty with consistently big year-over-year jumps and I suspect Mother's Day will show no different. We also see a comeback for trays pointing to an increase in gatherings and entertaining." 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	Apr vs '19	Apr vs '20
Deli entertaining	+4.9%	+9.1%	-3.9%	+6.5%	+0.1%	+1.3%	\$322M	+10.4%	+10.3%
Holiday meals	+3.1%	-25.8%	+13.0%	+7.7%	+22.4%	+129.8%	\$0.3M	+35.8%	+17.9%
Spreads	-0.2%	+7.3%	+2.5%	+3.7%	-1.8%	-7.6%	\$72M	-1.4%	-3.1%
Trays	+4.9%	+2.4%	-38.6%	-14.8%	-26.0%	-0.5%	\$46M	+9.4%	+154.5%
Deli prepared	+4.5%	+2.1%	-18.3%	-6.5%	-4.7%	-3.7%	\$1.5B	+5.1%	+46.7%
Appetizers	+5.5%	-2.6%	-24.3%	-14.8%	-16.9%	-9.7%	\$129M	-11.0%	41.7%
Breakfast	+32.9%	+16.3%	+7.4%	+7.0%	+16.2%	+11.7%	\$29M	+42.2%	+30.9%
Combo meals	-0.4%	-9.7%	-68.8%	-59.7%	-37.1%	-34.7%	\$12M	-39.1%	+143.9%
Desserts	-2.9%	-5.5%	-44.5%	-24.1%	-8.5%	-2.7%	\$7M	-3.9%	+112.7%
Entrees	+5.4%	+1.2%	-19.4%	-4.2%	-1.4%	+12.7%	\$368M	+19.2%	+73.4%
Pizza	+3.8%	+3.6%	-20.3%	-13.4%	-10.7%	-10.4%	\$50M	-5.2%	+20.0%
Prepared meats	+4.1%	+5.8%	-13.0%	-6.6%	-6.5%	-5.7%	\$293M	-2.7%	+29.8%
Salads	+2.2%	+3.8%	-16.1%	-5.6%	-3.2%	+1.2%	\$294M	+4.7%	+40.3%
Sandwiches	+5.0%	-1.3%	-26.3%	-6.7%	-3.2%	-5.0%	\$211M	+10.5%	+80.7%
Side dishes	-0.9%	+10.0%	+7.5%	+13.4%	+12.1%	+6.1%	\$96M	+14.3%	+12.7%
Soups & chili	+10.7%	-2.6%	-26.0%	-13.5%	-14.0%	-6.2%	\$51M	-5.0%	+36.4%

Source: IRI, Total US, MULO, Integrated Fresh, % increase versus same period 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, were the strongest the first week of April, which was Easter week. Easter impacts the year-on-year trending in both comparisons because of the changing date of the holiday, which is why the comparison versus 2019 goes negative in the third week.

Bakery	Dollar sales	Dollar gains vs. 2019	Dollar gains vs. 2020
w.e. 4/4/2021	\$725.4M	+18.1%	+7.5%
w.e. 4/11/2021	\$648.5M	+4.7%	-5.4%
w.e. 4/18/2021	\$661.5M	-1.8%	+2.8%
w.e. 4/25/2021	\$662.1M	+14.4%	+2.4%

Split out by perimeter and aisle bakery underscores the very different performance picture. Aisle bakery had to go up against a very strong April 2020 and fell short by 12.2%. On the other hand, perimeter bakery went up against a down performance in April 2020 and improved 21.0%. With aisle bakery being the bigger of the two, this pulled down the overall March bakery performance to +1.8% versus year ago levels.

April 2021	Sales	Dollar % gains	Absolute dollar gains
Department bakery	\$2.7B	+1.8%	+\$47M
Perimeter bakery	\$1.1B	+21.0%	+\$235.4M
Aisle bakery	\$1.6B	-12.2%	-\$190.6M

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

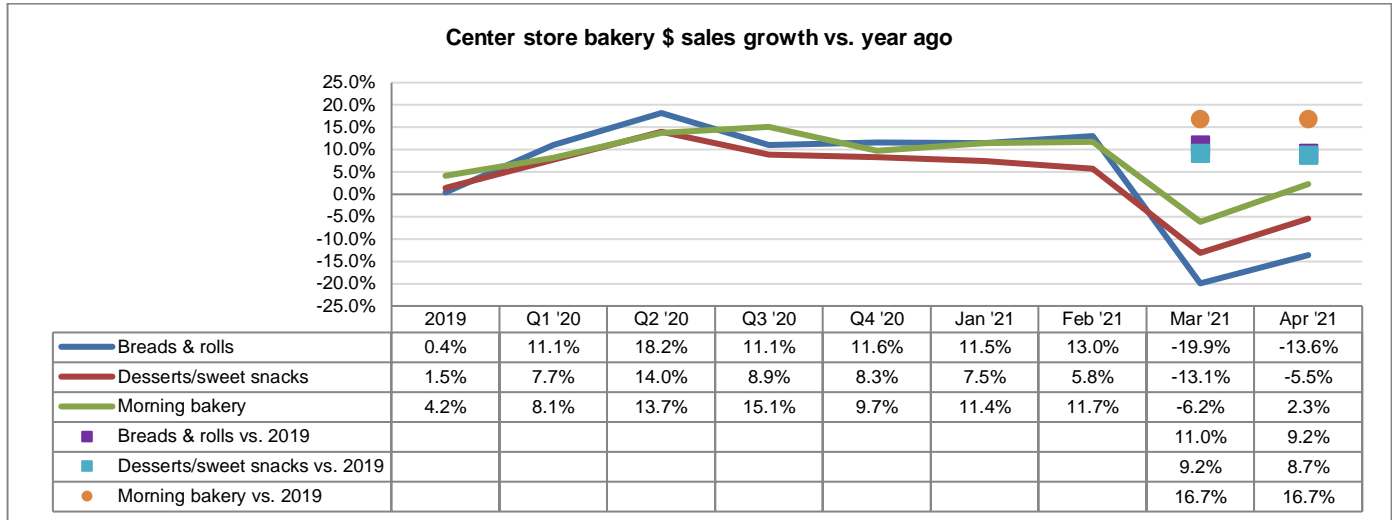
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Center Store Bakery

Baked goods items found in the “aisle” or center-store area adjacent, but not included in the perimeter bakery area, saw significant declines in breads/rolls and desserts as a result of big pandemic sales spikes in April 2020. However, compared with 2019, center store breads and rolls increased 9.2%, desserts and sweet snacks increased 8.7% and morning bakery increased 16.7%. This shows a continued elevated demand for



Source: IRI, Total US, MULO, Integrated Fresh, 1 month % growth versus 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, muffins and Danish pastries increased their sales versus April 2020, but the others saw either modest or significant year-over-year declines. However, same as seen earlier, all areas still saw increased demand versus the pre-pandemic normal, with big increases for bagels, croissants and muffins versus the 2019 baseline.

Center store baked goods	Current sales vs 2019 and 2020							Apr vs '19	Apr vs '20
	2019	Q1 '20	Q2 '20	Q3 '20	Q4 '20	Q1 '21	Apr '21		
Bagels/bialys	4.3%	+10.8%	+32.1%	+23.3%	+26.1%	+14.0%	\$92M	+26.2%	-9.0%
Breads	-0.3%	+9.9%	+15.0%	+7.3%	+7.8%	-3.8%	\$641M	+4.4%	-16.8%
Buns & rolls	+1.8%	+15.8%	+20.6%	+14.8%	+15.3%	+3.9%	\$344M	+14.4%	-8.6%
Snack cakes	+2.6%	+3.8%	+12.8%	+8.2%	+9.8%	+1.5%	\$91M	+4.1%	-5.7%
Donuts	+0.2%	+6.4%	+19.1%	+21.3%	+8.3%	+4.7%	\$84M	+12.3%	-7.2%
Muffins	+12.5%	+13.7%	+9.2%	+15.2%	+15.1%	+10.4%	\$58M	+27.3%	+18.3%
English muffins	-2.1%	+5.9%	+26.1%	+14.2%	+13.8%	+5.0%	\$56M	+8.2%	-20.7%
Cookies	+3.2%	+9.5%	+13.1%	+6.7%	+6.2%	-6.3%	\$51M	+8.3%	-10.9%
Pastry/Danish/coffee cakes	+3.2%	+4.8%	+8.6%	+3.6%	+6.4%	+2.0%	\$43M	+12.9%	+3.9%
Brownies/squares/bars	-0.8%	+10.7%	+12.1%	+10.3%	+6.0%	+2.7%	\$32M	+17.4%	+3.3%
Cakes	+0.3%	+8.5%	+17.5%	+8.9%	+9.6%	+3.5%	\$27M	+11.3%	-5.3%
Pies	-2.5%	+17.5%	+19.9%	+15.1%	+7.9%	-1.2%	\$21M	+14.9%	-3.5%
Tortillas/wraps/flatbreads	-1.2%	+11.2%	+9.3%	+18.0%	+15.5%	+3.6%	\$18M	+14.0%	+8.7%
Croissants	-20.1%	+1.0%	+0.3%	+24.0%	+28.1%	+15.9%	\$7M	+29.2%	+44.9%

Source: IRI, Total US Integrated Fresh, MULO, % growth versus 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

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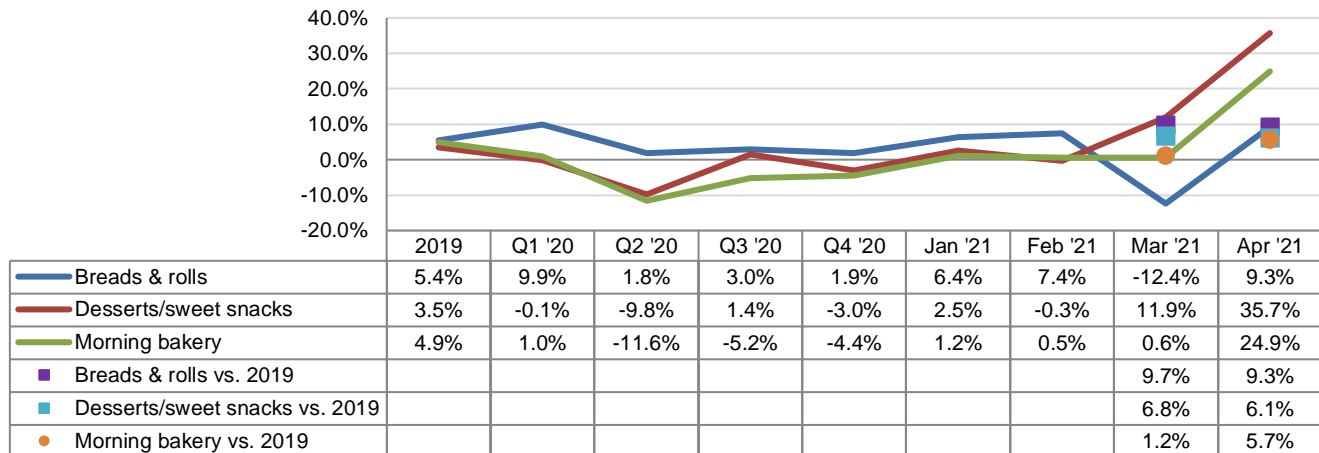
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Perimeter Bakery

The April 2021 perimeter bakery results show the reversal of what's up and what's down due to pandemic peaks and drops in 2020. Desserts and sweet snacks took a big hit in April 2020 as a result of shelter-in-place that severely impacted everyday and holiday celebrations traditionally driving interest in sweet indulgences. Sales had recovered to near pre-pandemic levels by February 2021 from a dollars perspective, even as sizing trended down. Come March, desserts and sweet snacks sales in the perimeter bakery recovered enough to come out ahead of 2019 pre-pandemic levels as well, at +6.8% and the same was true for April. In fact, all three areas in the in-store bakery tracked ahead of both 2020 and 2019 in April in another sign that that celebrations and entertaining are normalizing as well as the fresh bakery changing to meet the very different demands of today's shopper in a post-pandemic world.

Perimeter bakery \$ sales growth vs. year ago



Source: IRI, Total US, MULO, Integrated Fresh, 1 month % growth versus 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

At the subcategory level, the mixed performance of 2020 resulted in a mixed performance for April 2021 versus the pre-pandemic normal. In the year-on-year view, all areas in the fresh bakery increased, with high gains for all indulgent areas.

Perimeter bakery	Current sales vs 2019 and 2020							Apr vs '19	Apr vs '20
	2019	Q1 '20	Q2 '20	Q3 '20	Q4 '20	Q1 '21	Apr '21		
Bagels/bialys	+6.0%	+6.9%	-16.0%	-14.3%	-12.3%	-11.8%	\$18M	-3.6%	+11.0%
Breads	+3.4%	+10.5%	+7.2%	+7.1%	+4.2%	+1.0%	\$102M	+9.3%	+2.1%
Buns & rolls	+1.5%	+5.6%	-6.0%	-4.4%	-5.3%	-5.8%	\$63M	+0.5%	+11.2%
Croissants	+25.6%	+21.7%	+9.3%	+12.3%	+13.5%	+14.7%	\$37M	+31.9%	+27.0%
Tortillas/wraps/flatbreads	+3.7%	+7.9%	+8.5%	+11.5%	+12.6%	+7.1%	\$21M	+17.3%	+12.7%
Brownies/squares/bars	+6.2%	+6.3%	-4.6%	+6.8%	-1.1%	+15.0%	\$25M	+23.5%	+39.6%
Cakes	+2.4%	-1.6%	-9.6%	+2.8%	-3.2%	+6.9%	\$376M	+7.7%	+42.2%
Cookies	+6.1%	+6.1%	-10.1%	-1.2%	-4.9%	+2.0%	\$146M	+3.6%	+26.2%
Pies	+2.2%	-5.1%	-6.1%	+4.3%	+1.4%	+7.1%	\$70M	-3.1%	+22.3%
Specialty desserts	+7.6%	-13.1%	-42.8%	-37.1%	-27.8%	-18.0%	\$9M	-23.2%	+52.6%
Donuts	+1.6%	-4.0%	-30.8%	-20.9%	-17.0%	-11.0%	\$67M	-10.4%	+34.6%
Muffins	+4.5%	+2.5%	-5.2%	-2.6%	+1.5%	+3.2%	\$74M	+14.2%	+23.8%
Pastry/Danish/coffee cakes	+7.7%	+4.0%	-1.0%	+5.3%	+1.1%	+9.0%	\$113M	+12.4%	+20.4%

Source: IRI, Total US Integrated Fresh, MULO, % growth versus 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

COVID-19 IMPACT

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What's Next?

Several indicators of consumer mobility — reflecting how much people are moving around to go to school, work, out to dinner, vacation or visit family and friends, etc.— continue to trend up. In April, TSA checkpoint numbers, dining out, driving and walking statistics, gasoline sales, the re-opening of schools and more are all indicating a higher level of consumer mobility. Increased mobility is also likely to result in a shift from home-centric food spending to greater foodservice engagement, but may also drive increased demand for time-saving, convenience focused solutions and items tied to celebrations. According to the IRI survey of primary shoppers, in-person schooling continues to rise, with about 60% of the nation's school-aged kids going to school at least part of the week. This is likely to impact the breakfast and lunch occasions the most.

The next report in the IRI, 210 Analytics and IDDBA performance series will be released mid-June to cover the May 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 12/28/2019

Q1 2020: 13 weeks ending 3/29/2020

Q2 2020: 13 weeks ending 6/28/2020

Q3 2020: 13 weeks ending 9/27/2020

Q4 2020: 13 weeks ending 12/27/2020

Q1 2021: 13 weeks ending 3/28/2021

April: 4 weeks ending 4/25/2021