

Two Years Later: The Rollercoaster Ride Continues

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

The March Marketplace

Inflation has reached a 40-year high and consumers are extremely aware. “In March 2022, IRI’s survey of primary shoppers found that 92% of consumers believe food prices are somewhat or a lot higher than last year, of whom 95% are concerned about it,” shared Jonna Parker, Team Lead Fresh for IRI. “This includes 49% who are extremely concerned, which is far greater than the 27% of consumers who are extremely concerned over coronavirus in this same survey. This means that inflation has a far greater grip on the nation’s food spending than COVID-19 in the current marketplace.”

The inflationary levels are prompting a range of money-saving measures among 72% of consumers. “While shoppers tried to combine all grocery needs into one store, one trip in the past few years, 17% of consumers now visit multiple retailers to get the best deals,” added Parker. “Switching stores is typically one of the very last measures shoppers take in order to save. However, the widespread nature and level of inflation are such that even an extra trip to capitalize on lower prices or promotions is worth it. Others, especially lower-income shoppers, are leveraging online shopping as a money-saving measure given the ease of comparing prices and promotions across stores and the ability to monitor the total spend easily as items are added to the online basket.”

More commonly, 48% of consumers are looking for sales promotions. However, in the volatile market both the frequency of promotions and the depth of the discounts are down significantly versus pre-pandemic across departments. Other popular money-saving measures are cutting back on non-essentials (36%), looking for coupons (30%), simply buying less (26%) or switching to private-brands (21%). “These measures have resulted in prolonged unit and volume pressure across most categories, while dollar sales are boosted by inflation,” added Parker. The perimeter departments are no exception. To document the ever-changing nature of the marketplace, IRI, 210 Analytics and IDDBA continue to team up to bring the latest trends and analysis relative to the bakery, dairy and deli departments.

Inflation Insights

The price per unit across all foods and beverages in the IRI-measured multi-outlet stores, including supermarkets, club, mass, supercenter, drug and military, increased an average of 10.3% in the four weeks ending March 27, 2022 (“March”) versus the same four weeks in 2021. Prices rose 9.9% during the first quarter of 2022 top of the 5.5% of the first quarter in 2021. After many months of accelerated numbers, the inflation rate of +10.3% in March was the same as the rate seen in February.

Average price/unit vs. YA	Q1 21	Q2 21	Q3 21	Q4 21	Q1 22	Jan 22	Feb 22	Mar 22
Total food and beverages	+5.5%	+2.7%	+5.0%	+8.0%	+9.9%	+9.1%	+10.3%	+10.3%

Source: IRI, Integrated Fresh Total US, MULO

On a per unit basis, bakery (covering both in-aisle and perimeter baked goods), deli and dairy inflation were all three right around the average price increase seen across total food and beverages.

Average price/unit vs. YA	Q1 21	Q2 21	Q3 21	Q4 21	2021	Q1 22	Mar 22	Vs. YA
Total bakery	+9.0%	+3.6%	+4.1%	+7.8%	+6.2%	+8.8%	\$3.22	+10.3%
Total deli	+2.1%	+3.8%	+4.3%	+7.2%	+4.4%	+9.9%	\$5.47	+9.9%
Total dairy	+3.7%	-0.9%	+3.6%	+4.4%	+2.7%	+12.7%	\$3.16	+10.4%

Source: IRI, Integrated Fresh Total US, MULO

Perishables Performance

In March, total perishables grew 6.3%, with above-average increases for bakery, deli and refrigerated, which includes dairy. Compared to March 2020, the first month of the pandemic, the only departments showing increases were deli and seafood. The highest gain versus the pre-pandemic normal of 2019 was generated by meat, up 26% in March of 2022 versus March 2019. The departments still selling more units in March 2022 than they did in March 2019 are deli, meat, produce and refrigerated/dairy.

Product	\$ sales	Change vs. YA	Change vs. 2YA	Change vs. 3YA	Unit sales	Change vs. YA	Change vs. 2YA	Change vs. 3YA
Perishables	\$24.4B	+6.3%	-7.5%	+20.8%	6.6B	-3.7%	-17.8%	+2.2%
Bakery	\$2.9B	+10.2%	-0.5%	+20.5%	909M	-0.1%	-16.5%	-3.3%
Deli	\$3.2B	+8.1%	+8.9%	+19.6%	584M	-1.6%	-3.5%	+5.3%
Meat	\$6.3B	+6.2%	-17.3%	+26.0%	1.0B	-5.3%	-28.2%	+2.0%
Produce	\$5.6B	+4.7%	-2.3%	+17.4%	2.2B	-5.0%	-13.2%	+5.8%
Refrigerated	\$5.8B	+6.9%	-11.9%	+20.0%	1.8B	-3.1%	-20.7%	+0.5%
Seafood	\$504.6M	-10.4%	+4.3%	+16.1%	59M	-20.1%	-13.5%	-4.5%

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

Dairy Sales

“The four March weeks generated nearly \$5 billion in dairy sales, an increase of +7.1%,” said Jessica Ives, Professional Development Coordinator with IDDBA. “Also encouraging is the consistency of the weekly sales levels, all around \$1.2 billion, which means demand is holding strong — certainly when compared to pre-pandemic levels.”

Dairy	Dollar sales	Dollars vs. 2021	Units vs. 2021
March 2022	\$4.872B	+7.1%	-3.0%
w.e. 3/6/2022	\$1.231B	+6.9%	-2.6%
w.e. 3/13/2022	\$1.258B	+9.4%	-0.8%
w.e. 3/20/2022	\$1.204B	+6.7%	-3.5%
w.e. 3/27/2022	\$1.179B	+5.5%	-5.0%

Milk was easily the biggest seller in March 2022, at \$1.2 billion, which was down slightly from \$1.3 billion in February. The next biggest sellers were natural cheese and yogurt. “The two columns on the far right of the table below show the change versus year ago in dollars and pounds. The difference between the two percentages is a good proxy for the combination of inflation and fewer sales promotions,” said Ives. “For most, dollar sales were up year-on-year while volume was down.” As an example, the gap between milk dollar growth and volume growth is nearly 13 percentage points — signaling double-digit inflation.

	Sales vs. YA								\$ vs YA	lbs vs YA
	2019	2020	Q1 21	Q2 21	Q3 21	Q4 21	Q1 22	Mar '22		
Dairy	0%	+13%	0%	-9%	0%	+1%	+5.0%	\$4.9B	+7.1%	--
Milk	+1%	+10%	-1%	-6%	0%	+1%	+6.2%	\$1.2B	+9.8%	-3.2%
Natural cheese	+2%	+20%	+2%	-12%	-2%	-2%	-1.0%	\$879M	-0.2%	-1.4%
Yogurt	-1%	+4%	-2%	+5%	+5%	+7%	+7.2%	\$670M	+8.4%	-0.3%
Eggs	-10%	+18%	-2%	-18%	+2%	+5%	+12.8%	\$559M	+12.5%	--
Cream/creamers	+8%	+15%	+7%	-3%	+4%	+3%	+6.7%	\$399M	+8.1%	-0.3%
Butter/margarine	+1%	+17%	-7%	-25%	-7%	-3%	+2.5%	\$371M	+6.4%	-9.1%
Processed cheese	-3%	+16%	-6%	-14%	-3%	-3%	+0.7%	\$165M	+3.3%	-0.3%
Cream cheese	+4%	+18%	+9%	-8%	-1%	0%	+2.9%	\$167M	+11.0%	-2.1%
Whipped toppings	+9%	+22%	+17%	-9%	-2%	+1%	+2.4%	\$108M	+4.7%	-0.1%
Sour cream	0%	+14%	+1%	-17%	-4%	+3%	+4.8%	\$102M	+7.4%	-0.7%
Cottage cheese	-3%	+5%	-4%	-9%	-5%	-3%	+3.0%	\$86M	+3.7%	-3.1%
Desserts	+5%	+10%	+7%	+18%	13%	+14%	+11.0%	\$89M	+8.1%	-0.5%
Cheese snack kits	+5%	-13%	-12%	+12%	-4%	-3%	+16.6%	\$25M	+13.8%	+2.5%
Dairy alternative cheese	+5%	+30%	-5%	-17%	-3%	-11%	-7.9%	\$8M	-6.6%	-8.5%

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

Deli Sales

“The deli department remained an area of strength in March 2022,” said Heather Prach, Director of Education for IDDBA. “Just like seen in March, deli cheese was the only area of year-on-year decline but this was mostly related to much lower levels of inflation compared with the other areas within deli. Additionally, we continue to receive reports from retailers across the country who have had to close deli counters once more due to labor shortages.”

March 2022	Dollar sales	Dollar gains vs. 2021	Dollar gains vs. 2020	Price per unit vs. YA
Department deli	\$3.2B	+8.1%	+8.9%	+9.9%
Deli cheese	\$562M	-1.6%	-8.5%	+4.7%
Deli entertaining	\$332M	+8.5%	+2.0%	+9.1%
Deli meat	\$605M	+5.8%	-1.2%	+12.8%
Deli prepared	\$1.7B	+12.7%	+22.7%	+10.8%

Source: IRI, Total US, Integrated Fresh, MULO, % growth vs YA

Deli Meat

Deli meat sales (combined fixed and random weight) totaled \$605 million for the four March weeks compared with \$746 million in February 2022 weeks. While down compared to last month, the \$605 million did mean a 5.8% increase versus year ago. Compared with 2020, the first and fourth week of March showed increases but in going up against the massive spikes of the week endings March 13th and 20th, sales could not hold the line.

Deli meat	Dollar sales	Dollar gains vs. 2021	Dollar gains vs. 2020
March 2022	\$605M	+5.8%	-1.2%
w.e. 3/6/2022	\$151M	+6.5%	+15.1%
w.e. 3/13/2022	\$154M	+6.3%	-12.8%
w.e. 3/20/2022	\$152M	+5.8%	-11.9%
w.e. 3/27/2022	\$148M	+4.5%	+12.2%

Gains are inflation-boosted with volume sales having tracked in negative territory since the third quarter of 2021.

Total Deli Meat (FW/RW)	Sales vs. YA									
	2019	2020	Q1 '21	Q2 '21	Q3 '21	Q4 '21	Q1 '22	Mar '22	vs 2021	vs 2020
Dollars	+2.1%	+10.6%	+6.5%	+6.6%	+2.2%	+6.0%	+7.0%	\$605M	+5.8%	-1.2%
Volume	+0.0%	+5.6%	+2.6%	+3.0%	-1.6%	-3.2%	-4.9%	61M	-6.4%	-15.4%

Service deli meat remained the largest of the three areas, but all growth was driven by grab & go and pre-sliced deli meat. Both had increases in dollars and pounds, whereas service deli meat declined -12.0% in pound sales versus March 2021.

Total Deli Meat (FW/RW) \$	Sales vs. YA									
	2019	2020	Q1 '21	Q2 '21	Q3 '21	Q4 '21	Q1 '22	Mar '22	\$ vs YA	lbs vs YA
Grab & go	+23.9%	+55.5%	+38.7%	+7.7%	+11.6%	+15.9%	+21.6%	\$183M	+20.7%	+5.7%
Pre-sliced	+5.5%	+20.3%	+13.7%	+4.5%	+5.0%	+12.7%	+6.0%	\$57M	+5.0%	+0.1%
Service	-2.4%	-1.3%	-3.5%	+6.5%	-1.9%	+1.0%	+1.2%	\$365M	-0.3%	-12.0%

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

Deli Cheese

March 2022 deli cheese sales totaled \$562 million, which was down from \$576 million in February. Likewise, when compared to year ago levels, sales were down between 0.6% and 2.8%.

However, it is important to note the relatively small difference between the dollar and volume performance

— pointing to relatively low inflation for deli cheese. With an average price per unit of \$4.89, deli cheese prices in March 2022 have risen +4.7% versus March of 2021. Contrasting that to +9.9% for total deli unit inflation; +9.1% for deli entertaining, +12.8% for deli meat and +10.8% for deli-prepared foods, is the key to understanding the comparatively lower deli cheese growth.

Deli cheese	Dollar sales	Dollar gains vs. 2021	Dollar gains vs. 2020
March 2022	\$562M	-1.6%	-8.5%
w.e. 3/6/2022	\$141M	-1.5%	+9.2%
w.e. 3/13/2022	\$144M	-0.6%	-19.1%
w.e. 3/20/2022	\$140M	-1.5%	-18.6%
w.e. 3/27/2022	\$137M	-2.8%	+1.3%

Total Deli Cheese (FW/RW) \$				Sales vs. YA						
	2019	2020	Q1 '21	Q2 '21	Q3 '21	Q4 '21	Q1 '22	Mar '22	vs YA	Vs 2YA
Dollars	+1.6%	+16.8%	+10.0%	-2.1%	+0.3%	+2.5%	-0.4%	\$562M	-1.6%	-8.5%
Volume	+0.2%	+13.0%	+5.6%	-6.0%	-2.1%	-0.5%	-4.0%	71M	-5.3%	-15.9%

Grab & go and pre-sliced cheese have been highly successful strategies long before the onset of the pandemic and in March 2022 grab-and-go sales were equal to service cheese. However, the largest seller remains specialty cheese, reaching \$352 million, although down slightly from 2021.

Total Deli Cheese (FW/RW)				Sales vs. YA						
	2019	2020	Q1 '21	Q2 '21	Q3 '21	Q4 '21	Q1 '22	Mar '22	\$ vs YA	Price/lb vs YA
Grab & go	+7.9%	+29.9%	+15.1%	-6.0%	+2.5%	+4.3%	+5.0%	\$86M	+3.8%	+3.1%
Pre-sliced	-6.3%	+16.1%	+2.6%	-5.2%	+1.8%	+7.0%	+4.9%	\$32M	+2.6%	+2.5%
Service	-1.5%	+0.6%	-6.2%	+1.2%	-3.1%	-6.3%	-7.1%	\$86M	-7.9%	+3.6%
Specialty	+2.0%	+18.7%	+14.0%	-2.3%	+0.1%	+3.7%	-0.7%	\$352M	-1.8%	+4.5%

Source: IRI, Total US, MULU, Integrated Fresh

Deli Prepared and Deli Entertaining

March delivered another strong month for deli prepared and deli entertaining sales. "The March 2022 deli entertaining and prepared foods numbers held up against both 2021 and 2020," said Parker. "Hand-in-hand with value-added solutions in meat and poultry and sides available in the meat department, anything that saves people time and provides an easy entertaining solution is doing very well throughout the store. We have a number of holidays coming up where spreads and trays can play a central role, including Mother's Day, Memorial Day and the summer holidays."

Deli entertaining	Dollar sales	Dollar gains vs. 2021	Dollar gains vs. 2020
March 2022	\$331.6M	+8.5%	+2.0%
w.e. 3/6/2022	\$82.7M	+1.9%	+9.8%
w.e. 3/13/2022	\$83.6M	+9.5%	-12.1%
w.e. 3/20/2022	\$83.1M	+8.2%	-4.4%
w.e. 3/27/2022	\$82.2M	+5.5%	+21.3%

Deli prepared had a very strong month also. "Deli prepared had a tough 2020 and even 2019 was not the banner year we had come to expect from deli prepared," added Parker. "However, as consumer mobility has returned with kids back in school, evening activities back on, and more and more offices opening back up, the pressure on time is back. With it, growth of deli prepared food sales are back. It is important to view the time-saving benefits holistically, to include the ease of planning, shopping, preparation and cleanup. Everything matters."

Deli prepared	Dollar sales	Dollar gains vs. 2021	Dollar gains vs. 2020
March 2022	\$1.7B	+22.7%	+17.9%
w.e. 3/6/2022	\$430M	+12.4%	+17.3%
w.e. 3/13/2022	\$427M	+5.6%	+20.1%
w.e. 3/20/2022	\$422M	+27.0%	+18.4%
w.e. 3/27/2022	\$417M	+58.5%	+15.8%

Most areas in both deli entertaining and prepared foods had strong March results, with only a few areas declining in year-on-year unit sales despite the inflationary climate.

Deli Prepared				Sales vs. YA						
	2019	2020	Q1 '21	Q2 '21	Q3 '21	Q4 '21	Q1 '22	Mar '22	\$ vs YA	Units vs YA
Deli entertaining	+5%	+5%	+2%	+9%	+7%	+13%	+10%	\$332M	+8.5%	-0.6%
Dips and sauces	+7%	+10%	+4%	+1%	+2%	+6%	+8%	\$177M	+7.5%	+0.2%
Spreads	-0%	+3%	-8%	-2%	-1%	+6%	-1%	\$72M	-1.6%	-7.7%
Trays	+5%	-19%	+1%	+96%	+47%	+65%	+35%	\$47M	+33.3%	+15.6%
Deli prepared	+5%	-7%	+1%	+32%	+21%	+20%	+15%	\$1.7M	+12.7%	+1.7%
Entrees	+8%	-4%	+13%	+52%	+37%	+33%	+25%	\$437M	+20.9%	+10.1%
Prepared meats	+3%	-7%	-5%	+17%	+10%	+14%	+9%	\$320M	+7.7%	-1.0%
Salads	+3%	-7%	+1%	+30%	+18%	+23%	+15%	\$290M	+13.6%	+1.4%
Sandwiches	+4%	-9%	+5%	+52%	+24%	+23%	+17%	\$229M	+21.3%	+1.7%

Appetizers	+6%	-14%	-10%	+20%	+10%	+12%	+8%	\$135M	+6.6%	-7.5%
Side dishes	-1%	+10%	+6%	+9%	+8%	+5%	+4%	\$99M	+2.0%	-5.3%
Soups & chili	+11%	-13%	-6%	+37%	+41%	+31%	+31%	\$76M	+22.7%	+8.7%
Pizza	+6%	-9%	-10%	+21%	+12%	+6%	+7%	\$56M	+8.6%	+7.1%
Breakfast	+32%	+11%	+11%	+24%	+19%	+6%	+0%	\$30M	+0.8%	-11.7%
Combo meals	+2%	-42%	-35%	+99%	+81%	+12%	+23%	\$15M	+28.1%	+47.6%
Desserts	+%	+%	-3%	78%	39%	+18%	+10%	\$8M	+6.1%	+5.8%

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

Fresh perimeter and aisle bakery delivered growth in March. Perimeter bakery grew dollars and pounds on below-average inflation. Inflation of aisle bakery goods was 12.6% in March of 2022 compared to March 2021, which boosted dollar sales but hurt pound sales.

March 2022 sales	Dollar sales	\$ vs. 2021	Lbs* vs. 2021	Price per lbs vs. YA
Bakery department	\$2.9B	+10.2%	+0.1%	+10.0%
Aisle bakery	\$1.7B	+10.9%	-1.6%	+12.6%
Fresh bakery	\$1.2B	+9.2%	+3.5%	+5.4%

Each of the four March weeks increased in dollars but unit results were mostly down — although the decreases are contained to within one percentage point of last year's results.

Bakery	Dollars sales	\$ vs. 2021	Units vs. 2021
March 2022	\$2.9M	+10.2%	-0.1%
w.e. 3/6/2022	\$728M	+10.4%	-0.1%
w.e. 3/13/2022	\$744M	+10.7%	+0.5%
w.e. 3/20/2022	\$736M	+10.0%	-0.3%
w.e. 3/27/2022	\$716M	+9.4%	-0.7%

Source: IRI, Total US, Integrated Fresh, MULO, % growth versus year ago.*Pounds calculated where product weight is known.

Center Store Bakery

Baked goods items found in the "aisle" or center-store area adjacent to the fresh bakery, increased +9.9% in March 2022. However, unit sales were down, with a few exceptions, most notably cakes, up +10.9%. Cake sales have been gearing up since the third quarter of 2021 as celebrations returned.

Center store baked goods	Current sales vs YA									Units vs YA
	2019	2020	Q1 '21	Q2 '21	Q3 '21	Q4 '21	Q1 '22	Mar '22	\$ vs YA	
Breads	-0.2%	+10.1%	-3.5%	-8.9%	+0.0%	+2.4%	+9%	\$728M	+9.9%	-0.2%
Buns & rolls	+1.8%	+16.8%	+3.9%	-5.8%	-0.4%	+3.8%	+7%	\$314M	+4.4%	-6.7%
Snack cakes	+2.6%	+8.5%	+1.9%	-1.2%	+7.4%	+9.9%	+14%	\$114M	+17.5%	-0.6%
Bagels/bialys	+4.4%	+22.7%	+13.8%	-4.8%	+5.1%	+7.0%	+12%	\$108M	+11.8%	-0.9%
Donuts	+0.2%	+13.5%	+4.6%	-2.8%	-0.4%	+9.2%	+19%	\$103M	+20.1%	+6.9%
Muffins	-12.5%	+13.2%	+10.5%	+22.0%	+15.9%	+26.2%	+20%	\$71M	+18.1%	+0.9%
English muffins	-2.1%	+14.8%	+5.0%	-13.2%	-1.4%	+0.1%	+5%	\$64M	+6.5%	-4.7%
Cookies	+3.1%	+7.9%	-9.3%	-5.4%	+4.3%	+2.7%	+28%	\$64M	+33.5%	+8.8%
Pastry/Danish/coffee cakes	+3.3%	+5.8%	+1.9%	+4.1%	+10.8%	+11.0%	+13%	\$48M	+9.2%	-6.0%
Brownies/bars	-1.1%	+9.7%	+2.7%	+7.4%	+19.2%	+6.1%	+13%	\$37M	+12.5%	-7.5%
Cakes	+0.3%	+11.1%	+3.6%	+0.7%	+13.8%	+12.0%	+29%	\$34M	+27.9%	+10.9%
Pies	-2.5%	+15.0%	-1.2%	+0.1%	-1.3%	-0.3%	-6%	\$19M	-9.7%	-22.3%
Wraps/flatbreads	-1.2%	+13.5%	+3.7%	+6.1%	-3.6%	+1.1%	-1%	\$19M	-0.3%	-8.0%
Croissants	-19.9%	+13.1%	+15.9%	+34.4%	+25.1%	+15.0%	+23%	\$7M	+10.5%	+1.1%

Source: IRI, Total US Integrated Fresh, MULO

Perimeter Bakery (including both fixed and random weight)

March 2022 continued to see great engagement with the perimeter or fresh bakery section. The two exceptions were breads and brownies, but it is important to keep in mind that both had extremely strong 2020 and early 2021 sales in those two categories. All other areas showed year-on-year dollar gains and most also gained in units.

Perimeter bakery	Current sales vs YA									Units vs YA
	2019	2020	Q1 '21	Q2 '21	Q3 '21	Q4 '21	Q1 '22	Mar '22	\$ vs YA	
Cakes	+2.5%	-2.7%	+7.1%	+23.7%	+13.8%	+15.8%	+9%	\$370M	+7.0%	+3.5%
Cookies	+6.0%	-2.7%	+2.4%	+21.8%	+15.7%	+19.4%	+13%	\$166M	+11.6%	+2.2%
Pastry/Danish/ coffee cakes	+7.8%	+2.7%	+9.1%	+17.6%	+16.0%	+14.1%	+10%	\$121M	+7.3%	-10.2%
Breads	+2.9%	+6.8%	+0.7%	+2.2%	+1.8%	-0.4%	+1%	\$110M	+0.9%	-4.3%
Muffins	+4.6%	-0.9%	+3.4%	+19.7%	+21.0%	+21.3%	+19%	\$86M	+20.1%	+17.1%
Donuts	+1.6%	-17.8%	-11.0%	+31.0%	+15.4%	+15.0%	+17%	\$83M	+25.3%	+20.9%
Buns & rolls	+1.5%	-2.6%	-5.7%	+9.9%	+10.6%	+8.9%	+9%	\$65M	+8.9%	+5.1%
Pies	+2.2%	-0.7%	+7.2%	+12.5%	+1.8%	+4.5%	+3%	\$64M	+1.8%	-10.4%
Croissants	+25.6%	+14.0%	+14.7%	+24.1%	+19.4%	+20.7%	+21%	\$42M	+18.9%	+15.1%
Wraps/flatbreads	+3.7%	+10.1%	+7.2%	+7.7%	+7.7%	+9.3%	+10%	\$23M	+11.1%	+1.2%
Brownies/bars	+6.5%	+2.2%	+15.3%	+26.7%	+19.2%	+2.4%	-5%	\$24M	+2.9%	-1.3%
Bagels/bialys	+6.0%	-8.8%	-11.8%	+14.0%	+19.3%	+17.7%	+20%	\$21M	+21.1%	+24.2%
Specialty desserts	+7.6%	-30.4%	-18.0%	+37.0%	+25.5%	+27.2%	+13%	\$9M	+5.5%	+19.7%

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.

What's Next?

The war in Ukraine, the renewed COVID lockdowns in China, record inflation, labor shortages and supply chain challenges will have a continued effect on food and produce sales in the months to come.

- Inflation is likely to boost dollar sales while pressuring unit and volume sales.
- Easter celebrations are forecast to be bigger than in 2021 with more people celebrating and larger gatherings.
- 80% of consumers have purchased from restaurants in March, most commonly takeout (54%), on premise dining (48%) and delivery (23%) according to IRI's monthly shopper survey. With the temperatures still warming up in Northern states, a much lower 12% have eaten outdoors at restaurants.
- Online shopping is balancing out around 5% buying all groceries online, while 67% buy all groceries in store. The remaining 28% have adopted a hybrid system in which they purchase some items online and some in person. This is expected to continue both as retailers continue to evolve online options as well as mobility becoming more commonplace.
- The share of Americans stocking up on items has increased from 30% in September 2021 to 44% in March 2022. Underlying reasons range from being concerned over the item not being available on future trips (20%) to further price increases (16%).

The next report in the IRI, 210 Analytics and IDDBA performance series will be released mid-May covering the April 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

2020: 52 weeks ending 12/27/2020

Q1 2021: 13 weeks ending 3/28/2021

Q2 2021: 13 weeks ending 6/27/2021

Q3 2021: 13 weeks ending 9/26/2021

Q4 2021: 13 weeks ending 12/26/2021

Q1 2022: 13 weeks ending 3/27/2022

January 2022: 5 weeks ending 1/30/2022

February 2022: 4 weeks ending 2/27/2022

March 2022: 4 weeks ending 3/27/2022