



Insights from the Inner-city

**COVID-19 Impact
on the Urban Independent Retailer**



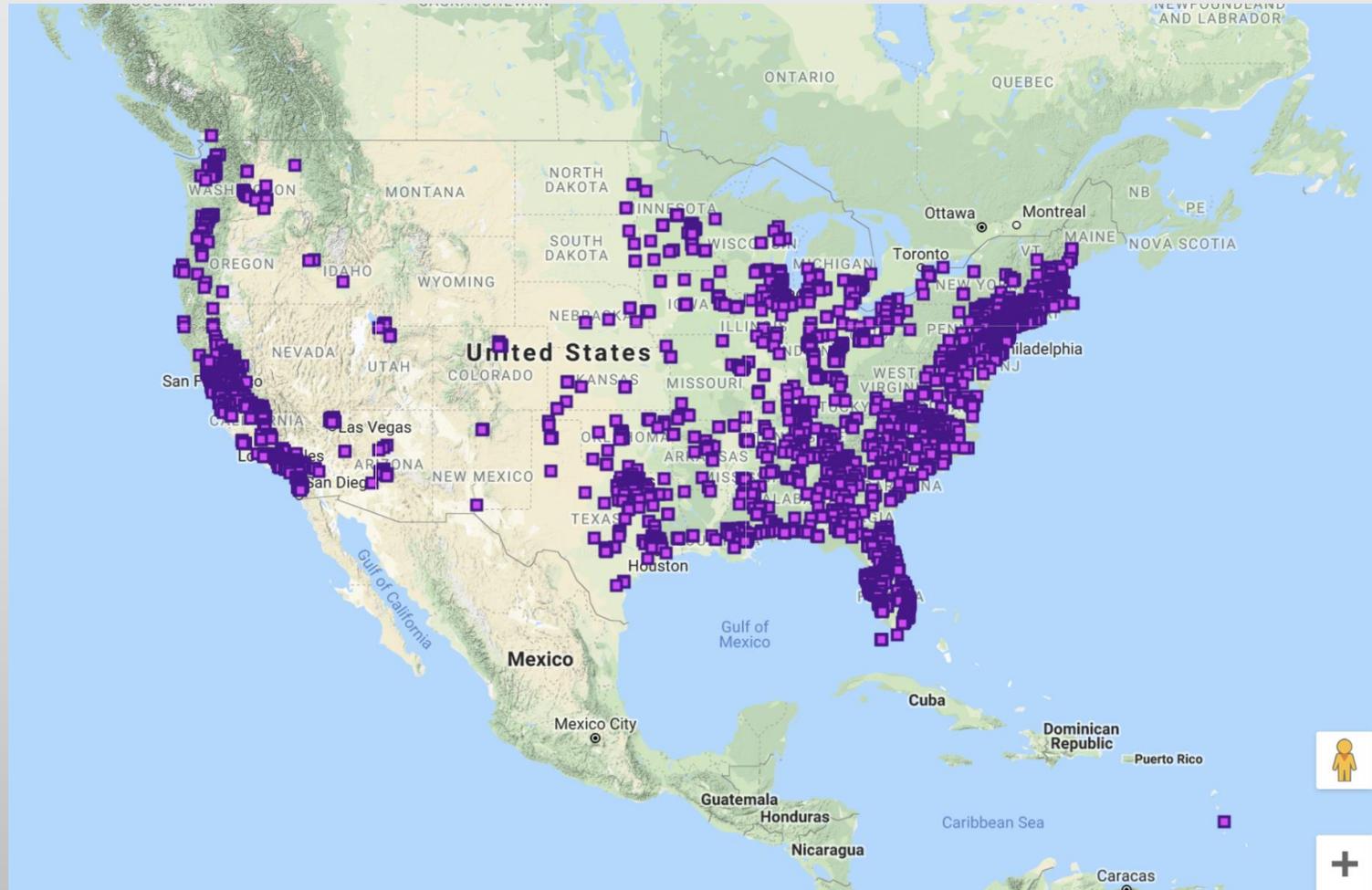
The NRS Universe

Background

- ~8,000 inner-city, independent retailers predominantly made up of bodegas, neighborhood markets and non-fuel convenience stores
- With ~ \$4.5B in sales from over 425 million transactions per year
- That service a multicultural shopper
- Across 45 states and 152 DMAs
- “White space”: Not measured through syndicated sources, typically not supplied by broadline Distributors, many not identified in TDLinx standard Master.

The NRS Universe

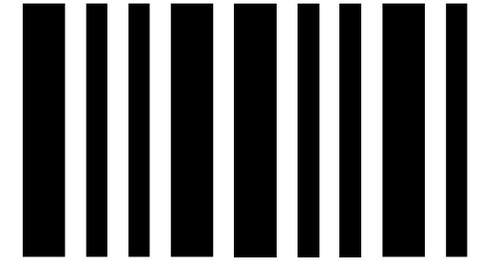
Geographic Footprint



Insights from the Inner-City Independents

- In the first 2-weeks after the swell of COVID-19 awareness and government orders, the NRS Universe of ~8,000 active urban outlets experienced a surge in sales.
- There was no significant difference in sales within states with partial or full stay-in-place orders vs. those with none.

Scanned \$ Sales



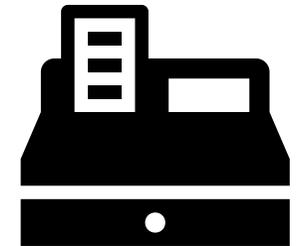
+ 36.1%

Baskets



+ 7.8%

Non-scanned sales

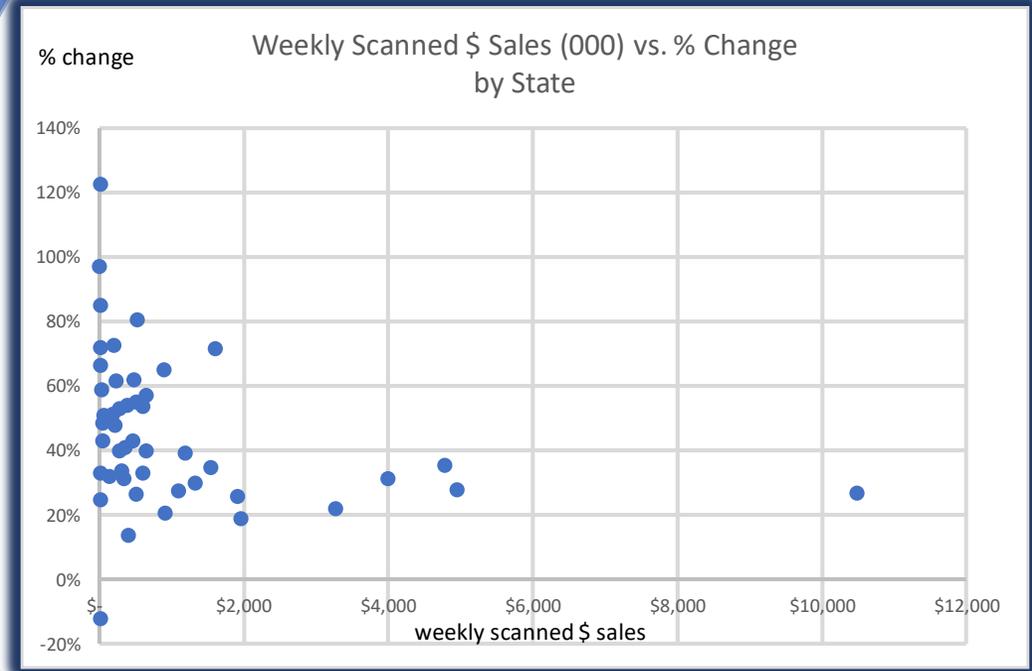


+ 19.4%

Insights from the Inner-City Independent

All but one state experienced scanned sales increases:

- 42 of 47 states have > 25% change
- 19 of 47 states have > 50% change



All Categories Grew Double or Triple Digits

TOP 25 Categories Based on Net Dollar Change

- Quarantine concerns drove panic purchasing.
- Shoppers increased their purchases of tobacco and alcoholic beverages from their bodega by 25-50%.
- Consumers pantry loaded food staples.
- Of the top net growth categories - Toilet Paper and Paper Towels yielded the greatest percentage increases.

\$ Change Rank	CATEGORY	% \$ change
1	CIGARETTES	25.2%
2	BEER	23.8%
3	LIGHT BEER	29.7%
4	RICE-PACKAGED & BULK	423.9%
5	FLOUR-SINGLE PURPOSE	441.1%
6	TOILET TISSUE	566.2%
7	VEGETABLES-BEANS-DRY	513.8%
8	LIQUOR-VODKA	38.6%
9	CIGARS	25.6%
10	MEXICAN TORTILLA-CT	73.0%
11	WINE-DRY TABLE	42.7%
12	LIQUOR-BRANDY/COGNAC	35.3%
13	LIQUOR-TEQUILA	46.0%
14	COOKIES-OZ	51.7%
15	EGGS-FRESH	143.6%
16	SEAFOOD-TUNA-SHELF STABLE	472.7%
17	CHEWING TOBACCO & SNUFF-OZ	34.1%
18	PAPER TOWEL	533.6%
19	DAIRY-MILK-REFRIGERATED	43.5%
20	WATER-BOTTLED-NONCARBONATED	33.9%
21	SALAD & COOKING OIL-FL OZ	188.4%
22	SEASONING-DRY-OZ	103.9%
23	LIQUOR-BOURBON-STRAIGHT/BONDED	45.6%
24	ALE	39.6%
25	LIQUOR-CANADIAN WHISKEY	45.4%

COVID-19 Drove Growth in Health Care Items

Top 25 Categories based on % Dollar Change

- Thermometers are the number one % dollar growth item
- 8 of the top 25 % dollar growth items are for disinfecting
- 5 items are for personal protection/hygiene

Rank	Category	% \$ Growth
1	FEVER THERMOMETER	2802.2%
2	FURNITURE & WOOD POLISH-CT	2546.9%
3	SPECIAL PURPOSE CLEANER-WIPE	1851.4%
4	DISINFECTANT & ANTISEPTIC-CT	1796.2%
5	MULTIPURPOSE CLEANER-WIPE	1534.6%
6	PAPER NAPKINS-SPECIAL OCCASION	1520.8%
7	FRUIT-PICKLED-CANNED-FL OZ	1300.7%
8	HEADACHE & BODY PAIN REMEDY-CHILD-CT	1065.4%
9	ORAL HYGIENE APPLIANCES & ACCESSORIES	1057.5%
10	PREMOISTENED WIPE & TOWELETTE-ADULT	1034.2%
11	SPECIAL PURPOSE CLEANER-OZ	1027.1%
12	SOAP-NON MEDICATED-OZ	988.5%
13	OUTDOOR CLEANER-FL OZ	929.2%
14	PAPER NAPKINS	883.7%
15	SYRUP-TABLE-BERRY/FRUIT TYPE-OZ	882.6%
16	ENTREES-REFRIGERATED-CT	881.1%
17	TOILET BOWL CLEANER & DEODORIZER-FL OZ	837.9%
18	PUMPKIN-CANNED	762.2%
19	DISINFECTANT & ANTISEPTIC-FL OZ	742.0%
20	VAPORIZING PRODUCT-FL OZ	731.3%
21	YEAST-DRY	693.3%
22	FEMININE HYGIENE-TOWELETTES	679.7%
23	SAUSAGE-BREAKFAST-IMITATION	676.3%
24	BREATHING AIDS-MASK/FILTER	670.4%
25	POTATOES-SPECIALTY-FROZEN-CT	664.1%