

The Future of Grocery Shopping and Meals At Home

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A NEW MARKET FOR PREPARED MEALS AT HOME

Pandemic boost drives investment in grocery retail More time at home, more meals at home The pandemic sparks a sudden increase in demand for grocery delivery "Cooking fatigue" prompts a new kind of convenience at home Increased competition for a limited "share of meals" Lots of long-term potential from grocery offerings Future is open with lots of space for grocery retail to experiment

EXPANDING ECOSYSTEM OF GROCERY OPTIONS

Why existing bricks-and-mortar brands could have an advantage A grocery-driven ecosystem of convenient options Scheduled grocery delivery and online marketplaces Subscription and replenishment services Impulse grocery delivery and "dark store" wholesale Semi-prepared products, packaged meals and meal kits Grocery foodservice and retail foodservice format blurring Balancing advantages with challenges in the years ahead

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