**Background:** The national average price of gasoline has sagged to its lowest level since June, falling 1.2 cents per gallon over the last week to $2.16 today. The national average price of diesel has decreased 0.4 cents and stands at $2.41 per gallon over the same period. An average of 17% of retail volume went to regional carriers in the first seven months of the year, compared to 3.8% in 2019 and 6.2% in 2018. This has become increasingly common throughout the year, with 24% of volume traveling with regional carriers in July. GDP contracted by 32.9% on an annualized basis in Q2 2020 vs. expectations of a 34.7% decline. On a quarter-over-quarter (i.e., non-annualized) basis, GDP shrank by 9.5%, which is perhaps a more meaningful measure given the uniqueness of the COVID-induced recession. The GDPNow model estimate for real GDP growth (seasonally adjusted annual rate) in the third quarter of 2020 is 20.3 percent on August 5, up from 19.6 percent on August 3.

### Communications

**US**
- 1.8 million jobs were added in July vs. an expectation of 1.5 million, following the strong gains that were achieved in May and June.
- The unemployment rate fell by 90 bps to 10.2% and the labor participation rate decreased slightly to 61.4%.
- The largest job gains were in the leisure & hospitality, government and retail sectors.
- The food index decreased 0.4 percent in July, its first decrease since April 2019. The food at home index fell 1.1 percent in July after increasing 0.7 percent in June. Five of the six major grocery store food group indexes fell in July. The index for meat, poultry, fish, and eggs decreased 3.8 percent in July. This decline was led by the index for beef, which fell 8.2 percent in July after increasing sharply in recent months.
- Payments on nearly one-fourth of all loans backed by hotel real estate are delinquent by at least 30 days, signaling an imminent and unprecedented wave of foreclosures, according to the American Hotel & Lodging Association (AH&LA).

### New reported cases by day in the United States

![Chart showing new reported cases by day in the United States](chart)

### Health and Medical

**US**
- Employment growth in the health-care sector continued in July, with almost 126,000 jobs added. Hospitals and ambulatory health services saw gains as non-COVID-related medical procedures, such as elective surgery, resumed. Nursing and residential care services lost more than 28,000 jobs.

### Transportation - Ports

- July numbers for the nation’s ports are showing mixed results, as imports have grown compared to earlier in the pandemic, but year-over-year (YoY) results vary. The Port of Long Beach showed 20% growth in loaded imports, while the Port of Virginia’s volume slid 20%.

### Energy - Fuel

- The national average price of gasoline has sagged to its lowest level since June, falling 1.2 cents per gallon over the last week to $2.16 today.
- The national average price of diesel has decreased 0.4 cents and stands at $2.41 per gallon over the same period.
- Crude oil inventories decreased by 7.4 million barrels (MMbbl) to a total of 518.6 MMbbl. At 518.6 MMbbl, inventories are 79.7 MMbbl above last year (18.2%) and are about 16% above the five-year average for this time of year.
NBEOC Lifeline Snapshot
Coronavirus (COVID-19) – Report #116
August 19, 2020

National Mobility Trends*

*As of 11/2020 Google Maps (154.4 million) and Apple Maps (23.3 million) had over 177.7 million unique users a month. By recognizing trends over time across different categories of places and modalities of travel a better understanding of how and when Americans are transitioning from a shelter-at-home posture to more normal day-to-day activities is possible. This data should be used in conjunction with other sources, reports and analyses to generate a holistic view of mobility trends and not in isolation. Google mobility data is also provided state by state and may be found at https://www.google.com/covid19/mobility/. Information from Google is lagging data. Apple mobility date is located at https://www.apple.com/covid19/mobility/?utm_source=morning_brew.

Google Users Mobility Trends
8/12/2020 – 8/19/2020 △ From Last Week

- Retail & Recreation
  -15% → -18%
  ↓ -3%

- Grocery & Pharmacy
  -5% → -2%
  ↑ 3%

- Parks
  57% → 67%
  ↑ 10%

- Transit Stations
  -29% → -21%
  ↑ 8%

- Workplaces
  -37% → -14%
  ↑ 23%

- Residential
  10% → 3%
  ↓ -7%

Apple Users Mobility Trends
8/12/2020 – 8/19/2020 △ From Last Week

- Shopping & Recreational
  -15% → -18%
  ↓ -3%

- Grocery & Pharmacy
  -5% → -2%
  ↑ 3%

- Parks
  57% → 67%
  ↑ 10%

- Transit Stations
  -29% → -21%
  ↑ 8%

- Workplaces
  -37% → -14%
  ↑ 23%

- Residential
  10% → 3%
  ↓ -7%
**CPG Demand: Multi-Outlet & Convenience (August 19, 2020)**

<table>
<thead>
<tr>
<th>Category</th>
<th>07.19</th>
<th>07.26</th>
<th>08.02</th>
<th>08.09</th>
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<td>111</td>
<td>107</td>
<td>108</td>
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<tr>
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<tr>
<td><strong>Meat</strong></td>
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<td>117</td>
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<tr>
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<td><strong>Tea</strong></td>
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<td><strong>Soft Drinks</strong></td>
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<tr>
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</tbody>
</table>

- For the week ending 8/9/2020, Total CPG demand was up 8% vs. year-ago. Demand slightly increased compared to the prior week, driven mainly by a sequential increase in the Total Non Edible department (104)
- Total Edible demand was 10% above year-ago levels. Each category and subcategory, within the department, was in the green, signaling strong growth compared to a year ago.

**CPG Demand: Grocery (August 19, 2020)**

<table>
<thead>
<tr>
<th>Category</th>
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<th>08.02</th>
<th>08.09</th>
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<td><strong>Total</strong></td>
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<td><strong>Grocery</strong></td>
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<td><strong>Meat</strong></td>
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<tr>
<td><strong>Soda</strong></td>
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<tr>
<td><strong>Snacks</strong></td>
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<tr>
<td><strong>Tea</strong></td>
<td>111</td>
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</tr>
<tr>
<td><strong>Soft Drinks</strong></td>
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<td>7.9</td>
</tr>
<tr>
<td><strong>Packaged</strong></td>
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<td>7.5</td>
<td>8.0</td>
<td>8.0</td>
</tr>
</tbody>
</table>

- Total Non Edible demand is up 4% vs. year-ago, driven mainly by Home Care (117). Keeping the home clean remains a priority for consumers with Household Cleaning 23% above year-ago levels.
- Deli Prep (79) continues to lag behind the rest of the Fresh Foods (109) department, which is producing demand well above year-ago levels. Contrastingly, Seafood produced another week of strong growth, up 25% from a year ago.

*The IRI CPG Demand Index is calculated weekly from point of sales data of measured retail channels which include convenience and multi-outlets (food, drug, mass, club, dollar, military), including click-and-collect orders for all brick-and-mortar stores, as well as delivery services like Instacart. IRI CPG Demand Index also includes insights into changes in weekly dollar sales by U.S. state and region as well as changes in basket size (the average spending per trip) and trip frequency (how often the shopper makes a purchase in a store or for online orders picked up at the store). Dynamic charts from IRI may be found at [https://advantage.iriworldwide.com/Engineering/covid19/](https://advantage.iriworldwide.com/Engineering/covid19/).*
For the week ending 7/26/20, inflation at the Total CPG level (up 7% vs. YAG) declined 100 basis points sequentially for the second week in a row, driven by a 200 basis point decrease in average prices in the Total Edible (up 7% vs. YAG) department.

Within Total Edible (107), the Beverages (107) category remained consistent vs. the week prior. It is the only Total Edible category that did not show lower levels of inflation on a sequential basis. Additionally, all other categories decreased to new inflationary lows since at least the week ending 4/19/20.

The Total Non-Edible (108) and Fresh Foods (107) departments remained consistent vs. the week prior.

Within Fresh Foods (107), Deli Prep (99) continued to be the only category with an average price per unit lower than YAG, continuing a trend that has been consistent since the week ending 5/31. Additionally, average prices in the Seafood (104) category decreased 600 basis points vs. the week prior, representing the most significant decline vs. the week prior of all categories across departments.

*The IRI CPG Inflation Tracker™ provides the well-known price per unit metric for tracking changes in pricing of consumer packaged goods. It provides weekly changes in consumer prices, price per unit against the year-ago period across departments including fixed and random weight products, grocery aisles and retail formats. Price per unit changes can be due to one or more of four factors: list price changes, changes in price promotions, trading up or down to higher or lower priced products, and finally, purchasing of larger or smaller packages. The IRI CPG Inflation Tracker™ is calculated from point of sales data of measured retail channels which include convenience and multi-outlets (food, drug, mass, club, dollar, military), including click-and-collect orders for all brick-and-mortar stores, as well as delivery services like Instacart. Dynamic charts from IRI may be found at [https://advantage.iriworldwide.com/Engineering/covid19/](https://advantage.iriworldwide.com/Engineering/covid19/).
The impact of coronavirus on local businesses by daily revenue

Impact of coronavirus on daily revenue at open grocery stores

Impact of coronavirus on daily revenue at open restaurants