



COVID-19 CRISIS

Nielsen Investigation of Impacts on FMCG trends in the Netherlands and around the world

Update: May 29th, 2020

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COVID-19

TRACKING THE IMPACT ON FMCG AND RETAIL

Weekly update

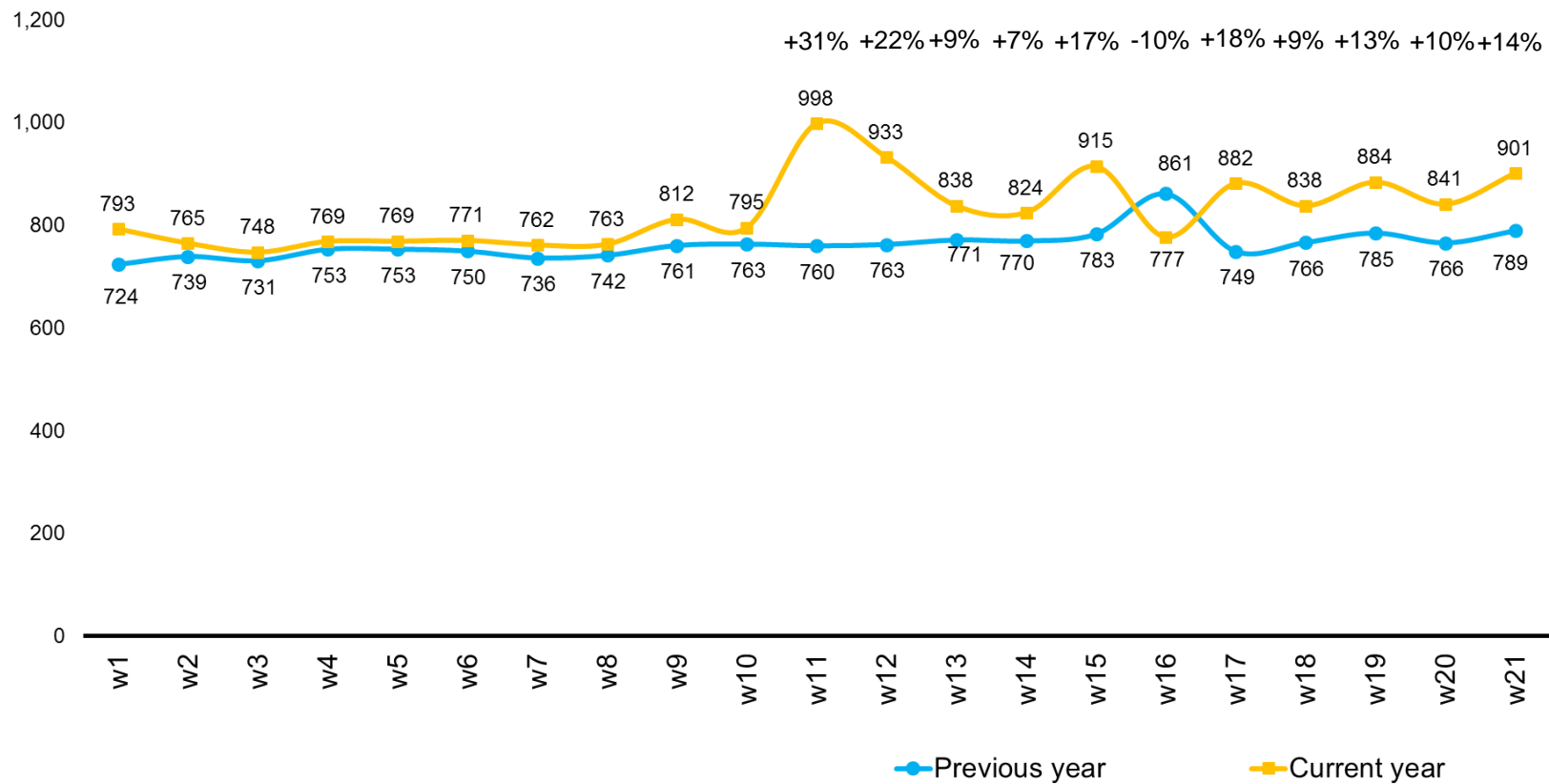
- Impact of COVID-19 on Supermarket Channel
- Drug Channel
- Perfumery Channel



SUPERMARKETS

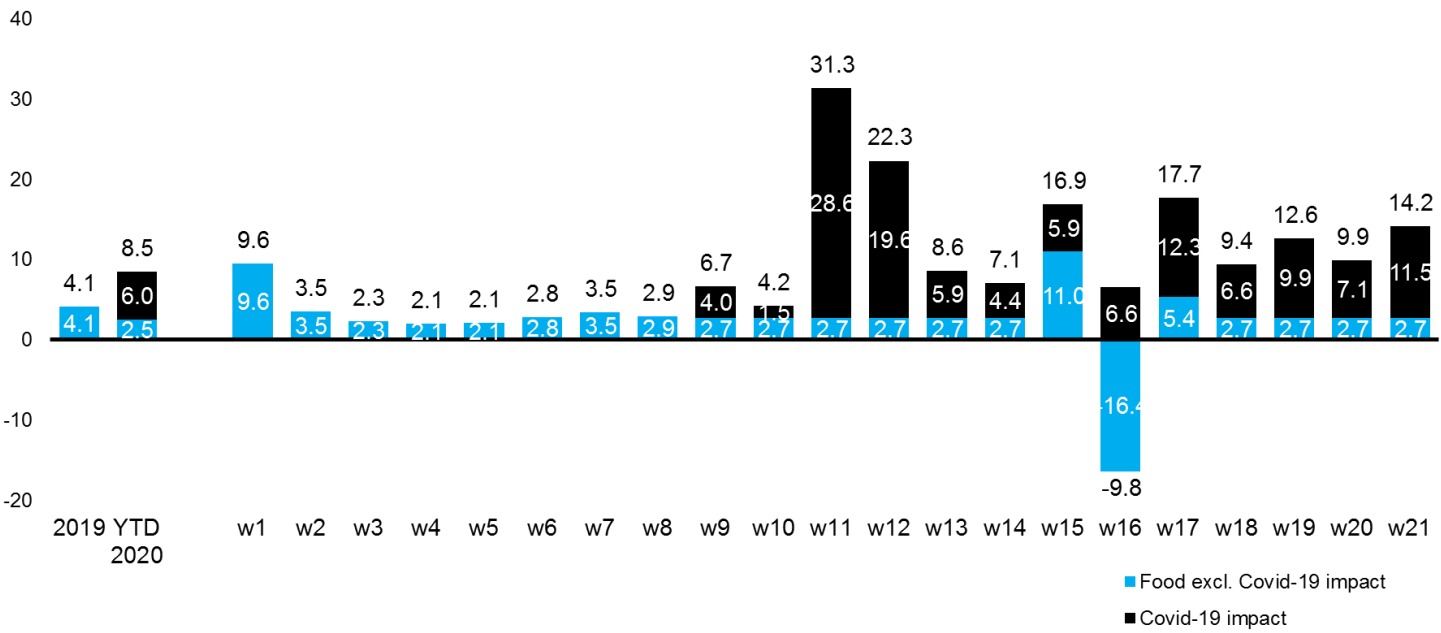
FOOD SALES PER WEEK

Food ACV per week (euro x mln)



IMPACT OF COVID-19 ON SALES

% Development supermarkets (ACV) vs. previous year - Food incl. E-com



Extra growth from wk9
€ 956M

Extra % growth from wk 9
9.3%

Impact on % YTD growth
6%

Note: estimated impact is the difference between the actual sales and the expected sales. The expected sales is based on the sales of previous year + the expected % value growth. The % expected value growth is 2.7% for most weeks (this was the growth in pre-Covid weeks). Exceptions are weeks where there is a positive or negative impact of bank holidays.

SALES DEVELOPMENT BY SUPERGROUP

% Value development supergroups - Food incl. Food-Ecom

	YTD 2020	wk2-8 2020	Cum from wk9	wk 09 20	wk 10 20	wk 11 20	wk 12 20	wk 13 20	wk 14 20	wk 15 20	wk 16 20	wk 17 20	wk 18 20	wk 19 20	wk 20 20	wk 21 20
Totaal Supermarkten (ACV)	8.5	2.7	11.4	6.7	4.2	31.3	22.3	8.6	7.1	16.9	-9.8	17.7	9.4	12.6	9.9	14.2
Dranken Houdbaar	8.5	1.3	11.6	0.5	-0.6	24.0	14.9	4.6	6.9	21.0	-10.2	19.2	13.0	21.6	11.2	27.0
Kruidenierswaren	13.6	3.2	19.7	20.7	9.1	71.8	53.9	20.1	12.2	12.3	-4.2	21.8	7.3	8.8	11.8	9.8
Zoetwaren & Snacks	5.0	4.1	5.1	6.8	5.5	22.7	11.4	3.5	5.2	2.7	-17.5	11.8	2.5	0.9	4.6	7.5
Diepvries	15.1	4.4	20.5	6.1	0.2	45.1	38.5	14.9	15.1	33.2	0.9	33.0	18.8	25.3	16.5	20.9
Vers	7.4	2.6	9.9	5.1	3.7	24.8	17.9	8.7	7.5	19.3	-9.6	18.6	7.2	9.6	6.8	11.2
Schoonmaak & Onderhoud	11.6	2.4	18.0	26.1	1.7	46.3	56.0	29.9	10.3	-2.1	17.1	9.4	4.7	13.8	11.0	13.3
Drogmetica	13.3	2.8	19.6	26.1	25.3	82.5	83.4	33.5	1.7	-1.8	1.4	-8.5	5.0	1.9	10.4	-3.8
Haarverzorging	3.7	0.8	3.9	0.2	-10.6	31.7	39.1	11.4	2.0	-7.7	25.4	-9.9	-11.2	17.7	-3.4	-24.3
Health Care	17.0	6.6	24.0	31.4	33.5	129.9	123.1	32.5	7.0	-1.6	-5.6	-12.4	-10.6	-11.1	-9.5	-9.0
Lichaamsverzorging	22.3	3.9	33.4	29.3	40.1	42.0	82.6	61.4	31.6	47.1	10.0	22.2	18.1	29.4	24.0	11.2
Mondverzorging	10.3	11.5	10.3	41.9	77.1	-5.8	46.3	17.1	-13.7	-30.7	14.4	-7.9	44.3	-17.4	18.4	-11.8
Papier	11.7	0.5	18.4	25.9	16.3	118.8	87.5	31.5	-5.6	-9.1	-4.9	-17.3	-0.4	-3.6	10.7	-3.9
Rookwaren	3.9	1.7	4.8	-3.6	0.8	13.8	9.4	-0.4	1.6	4.3	-1.7	5.1	7.5	12.0	5.1	9.7

SALES INDEX ON CATEGORY LEVEL

Ranked on estimated impact of Covid-19

Overview categories

Category	Value index wk2-8 2020/2019	Value index from wk9 2020/2019	Est. Impact in € (000) Actual minus expected	Index € sales vs PY															
				wk2-8 20	YTD from wk 9 20	w9	w10	w11	w12	w13	w14	w15	w16	w17	w18	w19	w20	w21	
Vlees	101	119	111,581	101	119	108	104	136	137	117	115	137	94	131	112	125	114	129	
Fruit	104	117	73,402	104	117	107	106	126	126	125	121	130	116	122	116	116	104	110	
Groenten	99	111	54,064	99	111	102	100	124	116	113	109	117	102	125	110	109	109	110	
Bier	102	113	40,647	102	113	90	95	114	106	96	107	136	85	125	119	136	112	148	
Stille Wijnen	96	111	34,527	96	111	100	93	101	110	100	108	134	89	131	118	118	112	134	
Koffie excl. oplos	104	121	29,496	104	121	99	101	144	142	134	119	108	106	132	113	126	124	127	
Zuivel	102	108	25,855	102	108	104	104	118	110	106	109	107	104	120	108	107	108	107	
Kaas	103	109	24,985	103	109	107	102	126	115	107	107	113	88	119	106	108	108	112	
Dv Ijs	107	133	23,006	107	133	102	105	114	103	120	125	209	83	168	138	183	128	133	
Toilet papier	104	122	14,412	104	122	131	134	255	186	139	91	88	92	79	97	90	109	100	
Geelvet	102	114	14,367	102	114	107	101	140	142	121	103	123	80	127	109	109	117	115	
Sauzen	103	120	14,222	103	120	104	106	130	132	119	121	147	82	134	118	126	116	136	
Dv Snacks	105	125	13,974	105	125	110	103	148	142	123	127	124	125	133	127	121	122	130	
Groentenconserven	104	130	13,939	104	130	154	112	257	220	134	110	96	99	113	95	97	106	105	
Vleeswaren	103	108	13,911	103	108	107	104	123	113	107	105	116	86	117	106	106	108	106	
Brood Afbak	105	129	13,713	105	129	104	106	202	166	144	157	182	50	131	124	131	117	150	
Huishoudreinigers	111	152	13,354	111	152	139	131	228	188	182	146	144	139	145	132	141	127	145	
Smaakmakers	104	132	12,700	104	132	120	112	140	136	135	149	129	110	153	139	131	138	135	
Bakproducten	102	168	12,405	102	168	144	114	216	262	228	199	186	117	176	134	135	149	142	
Pindas Noten+Aanv	103	115	12,253	103	115	106	102	126	107	110	115	121	95	129	119	122	120	120	

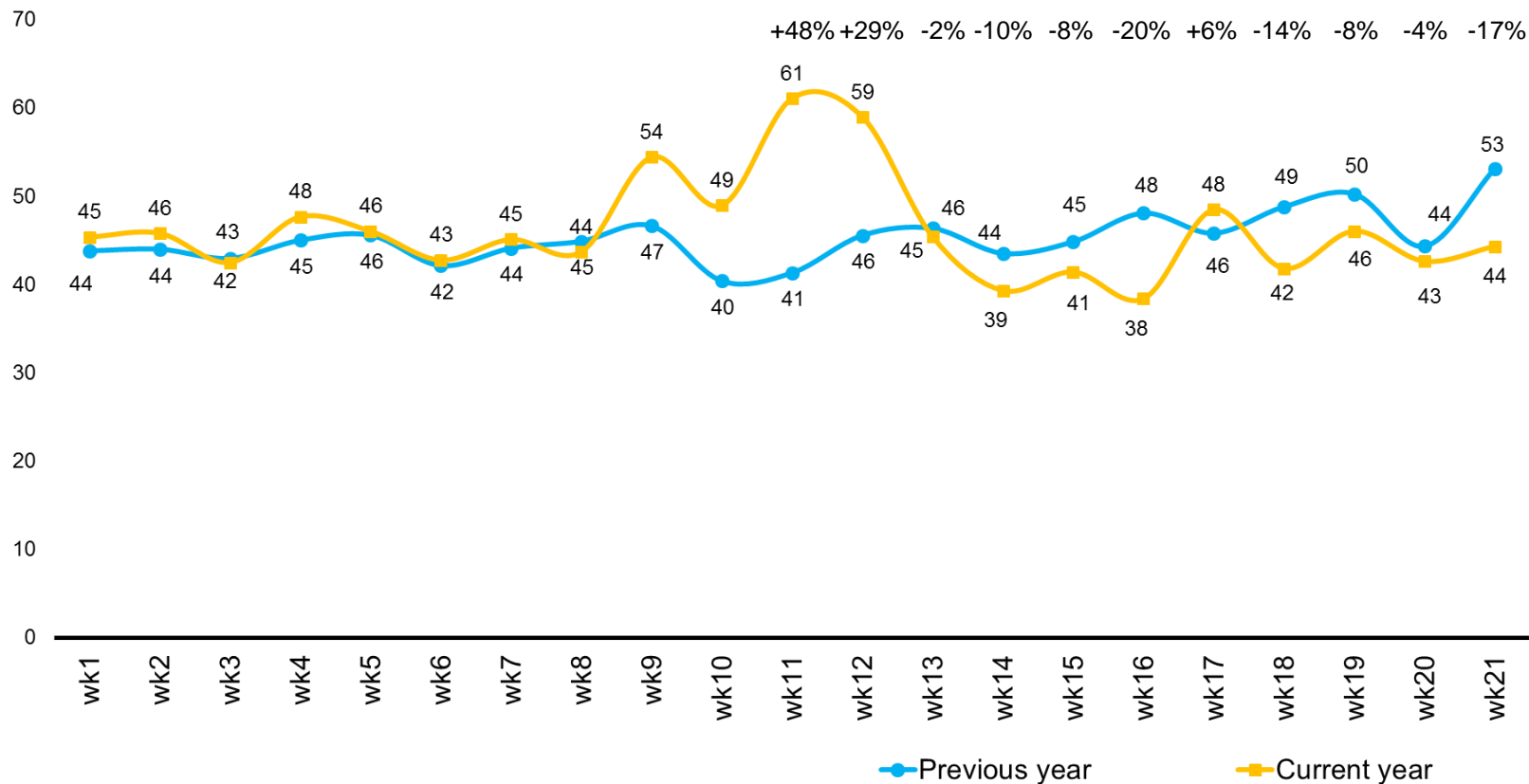
Note: estimated impact is the difference between the actual sales and the expected sales. The expected sales is based on the sales of previous year + the expected % value growth. The % expected value growth is based on the development prior to Covid-19



DRUG CHANNEL

DRUG SALES PER WEEK

Drogmetica in Drug per week (euro x mln)



DEVELOPMENT SUPERGROUPS IN DRUG

% Value development supergroups - Drug

	YTD 2020	wk2-8 2020	Cum from wk9 2020	wk 09 20	wk 10 20	wk 11 20	wk 12 20	wk 13 20	wk 14 20	wk 15 20	wk 16 20	wk 17 20	wk 18 20	wk 19 20	wk 20 20	wk 21 20
Drogmetica	2.0	1.6	2.0	16.7	21.2	47.8	29.4	-2.1	-9.7	-7.6	-20.2	5.8	-14.3	-8.4	-3.8	-16.6
Deco.Cosmetica	-14.8	-1.0	-23.0	-0.9	5.2	-15.2	-36.8	-35.0	-38.7	-32.8	-37.1	-10.6	-28.0	-21.9	-13.4	-30.8
Geuren	-16.8	-1.6	-24.6	-10.6	-1.3	-15.6	-38.3	-52.9	-42.1	-39.6	-43.7	-9.2	-11.7	-11.4	-24.4	-33.5
Haarverzorging	5.5	6.9	4.8	14.6	17.7	21.7	12.6	6.8	-1.8	-8.1	-3.5	18.4	0.3	-2.6	7.0	-14.0
Health Care	6.4	0.1	10.4	17.7	26.3	96.4	83.2	7.5	-9.4	-9.5	-18.0	-1.5	-17.2	-11.6	-7.0	-15.5
Lichaamsverzorging	4.9	3.1	5.7	21.4	26.8	26.4	11.3	12.4	9.0	12.9	-22.8	18.7	-11.2	-1.0	-3.8	-5.6
Mondverzorging	0.2	4.2	-2.6	24.3	18.2	35.8	20.6	-13.7	-20.0	-22.8	-16.3	1.0	-14.4	-9.7	12.2	-31.4
Papier	1.6	-1.9	3.9	28.3	21.1	80.3	39.3	-14.6	-15.9	-15.0	-12.5	-1.0	-20.7	-13.2	-1.5	-19.2
Schoonmaak & Onderhoud	12.2	11.9	13.3	41.7	22.5	65.8	50.3	9.6	7.9	10.6	15.7	7.9	-14.6	-9.7	3.0	-10.2
Dranken Houdbaar	3.9	6.2	1.5	36.3	48.6	29.9	2.1	-19.6	2.1	22.4	-29.0	41.1	-30.7	-35.7	7.4	-10.5
Kruidenierswaren	-3.6	0.3	-5.6	20.0	6.6	67.6	36.7	-15.2	-26.2	-34.1	-26.7	-17.4	-17.4	-23.7	-18.6	-27.4
Zoetwaren & Snacks	-2.5	4.0	-6.5	13.7	14.6	25.3	-1.6	-16.7	-18.0	-16.3	-32.8	6.1	-20.2	-14.2	-6.7	-13.5

SALES INDEX ON CATEGORY LEVEL - DRUG

Drug

Category	Value index wk2-8 2020/2019	Value index from wk9 2020/2019	Impact in € (000) Actual minus expected	Index € sales vs PY														
				wk2-8 20	YTD from wk 9 20	w9	w10	w11	w12	w13	w14	w15	w16	w17	w18	w19	wk 20	wk 21
Vit/Mineralen Suppl.	99	126	10,829	99	126	129	132	206	215	126	110	102	100	117	97	89	103	90
Toiletzeep	123	269	7,735	123	269	462	382	481	375	218	232	178	192	216	166	179	281	168
Hand/Bodyproducten	93	120	5,202	93	120	109	123	132	128	175	150	118	105	142	104	103	97	97
Haarkleurmiddelen	106	135	4,694	106	135	107	113	122	137	183	165	129	147	176	136	122	135	93
Otc Hoest Verkoudheid En Griep	94	113	4,234	94	113	105	129	244	227	122	83	93	68	90	73	88	79	80
Pijnstillers	107	120	3,305	107	120	134	147	318	253	103	84	74	70	84	74	79	84	73
Vochtige Doekjes	99	124	1,626	99	124	155	152	227	187	95	129	91	103	143	82	108	117	85
Diagnostica	101	346	939	101	346	236	397	836	656	151	177	489	360	294	233	228	235	173
Huishoudreinigers	99	151	866	99	151	156	155	311	427	159	135	132	89	93	80	98	112	101
Celstofbabyliuers	89	93	778	89	93	125	100	154	114	74	71	83	78	90	69	75	90	82
Toiletpapier	85	105	655	85	105	136	130	358	106	113	83	74	74	46	69	83	93	78
Schoonmaakhulpmiddelen	74	160	600	74	160	143	162	193	208	125	179	286	220	167	135	113	105	103
Papieren Zakdoekjes	103	148	598	103	148	200	211	386	314	112	80	63	97	103	82	89	102	78
Tissues Droog	102	150	581	102	150	149	145	266	245	163	137	104	120	142	109	114	137	107
Voetverzorging	100	101	318	100	101	103	107	110	85	85	93	112	99	120	91	111	116	86
Vaatwasmiddelen	101	122	213	101	122	96	143	362	110	105	63	54	99	238	64	50	268	196
Keukenpapier	120	135	186	120	135	140	148	229	141	99	99	102	156	122	79	101	121	194
Toiletreinigers	69	166	170	69	166	27	71	135	140	89	506	300	129	161	136	184	193	453
Schuimbaddproducten	101	102	156	101	102	124	118	130	114	101	96	76	95	126	95	85	99	89
Bleekmiddelen	113	149	74	113	149	445	308	344	282	158	171	84	95	34	63	108	135	307

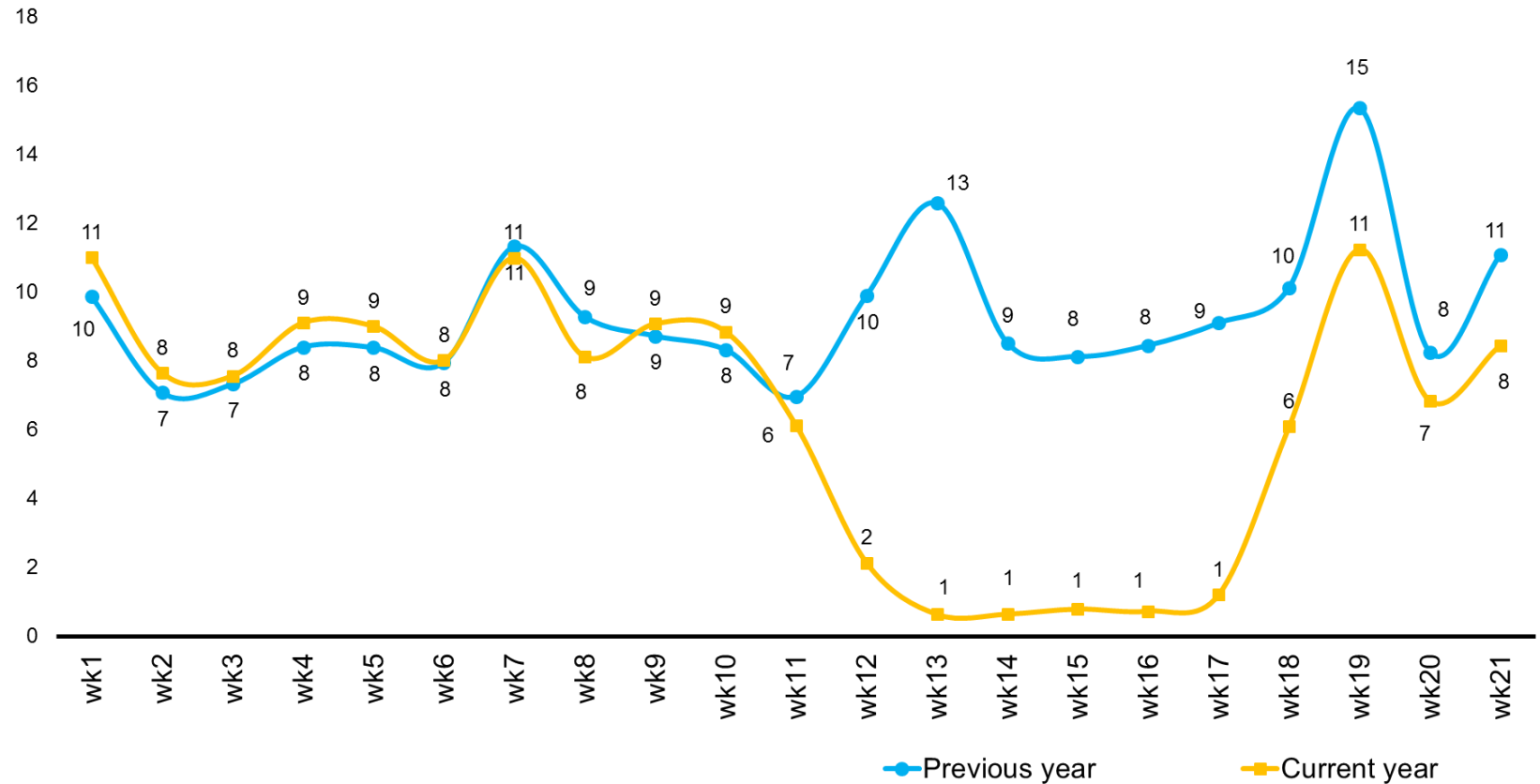
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PERFUMERY CHANNEL

PERFUMERY SALES PER WEEK

Drogmetica in Perfumery per week (euro x mln)



COVID-19

TRACKING THE IMPACT ON FMCG AND RETAIL

BE A STEP AHEAD WITH WEEKLY UPDATES

COVID-19 IS MOVING FAST, BUT YOU CAN BE FASTER.

CONTACT YOUR NIELSEN REPRESENTATIVE TO FIND OUT HOW TO GET WEEKLY UPDATES ON:

- THE IMPACT TO YOUR CATEGORIES AND BRANDS
- WHICH CHANNELS ARE PARTICULARLY IMPACTED
- WHERE THERE ARE DIFFERENCES REGIONALLY
- WHEN THE IMPACT WILL SLOW DOWN

SHOPPER SHIFTS TO A “NEW NORMAL”

A GLOBAL TRACKER OF HOW BEHAVIOURS CONTINUE TO EVOLVE THROUGH COVID-19



Stay close to “what” is happening with our RMS insights and “why” shopper’s (category) needs are changing during the coming months with this **new syndicated survey** (3 waves: May/June/July) to optimise your plans through the COVID-19 pandemic for shopper success.



TRIPS & MISSION
PATTERNS



CHANNEL & STORE
USAGE INCL. ONLINE



CATEGORIES
ON DEMAND



DECISION MAKING
FACTORS

Contact your Nielsen representative or sonja.vandenberg@nielsen.com for more information.

A detailed, blue-tinted microscopic image of a virus particle, likely SARS-CoV-2, showing its characteristic spherical shape and numerous surface spikes. The virus is positioned on the right side of the frame, with its spikes radiating outwards. The background is a blurred, darker blue, suggesting a field of similar particles or a laboratory setting.

“As patterns begin to emerge in response to news events of this nature, it will be imperative for companies to learn from these scenarios so they can sustain growth even in times where COVID-19 has uprooted people’s lives. These patterns will help provide leading and trailing indicators to those trying to understand how people will respond as developments continue to play out at different times in different countries.”

SCOTT MCKENZIE

Nielsen’s Global Intelligence Leader

Read the latest insights at www.nielsen.com/covid-19,
and reach out to your Nielsen representative for help.



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