COVID-19 CRISIS

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

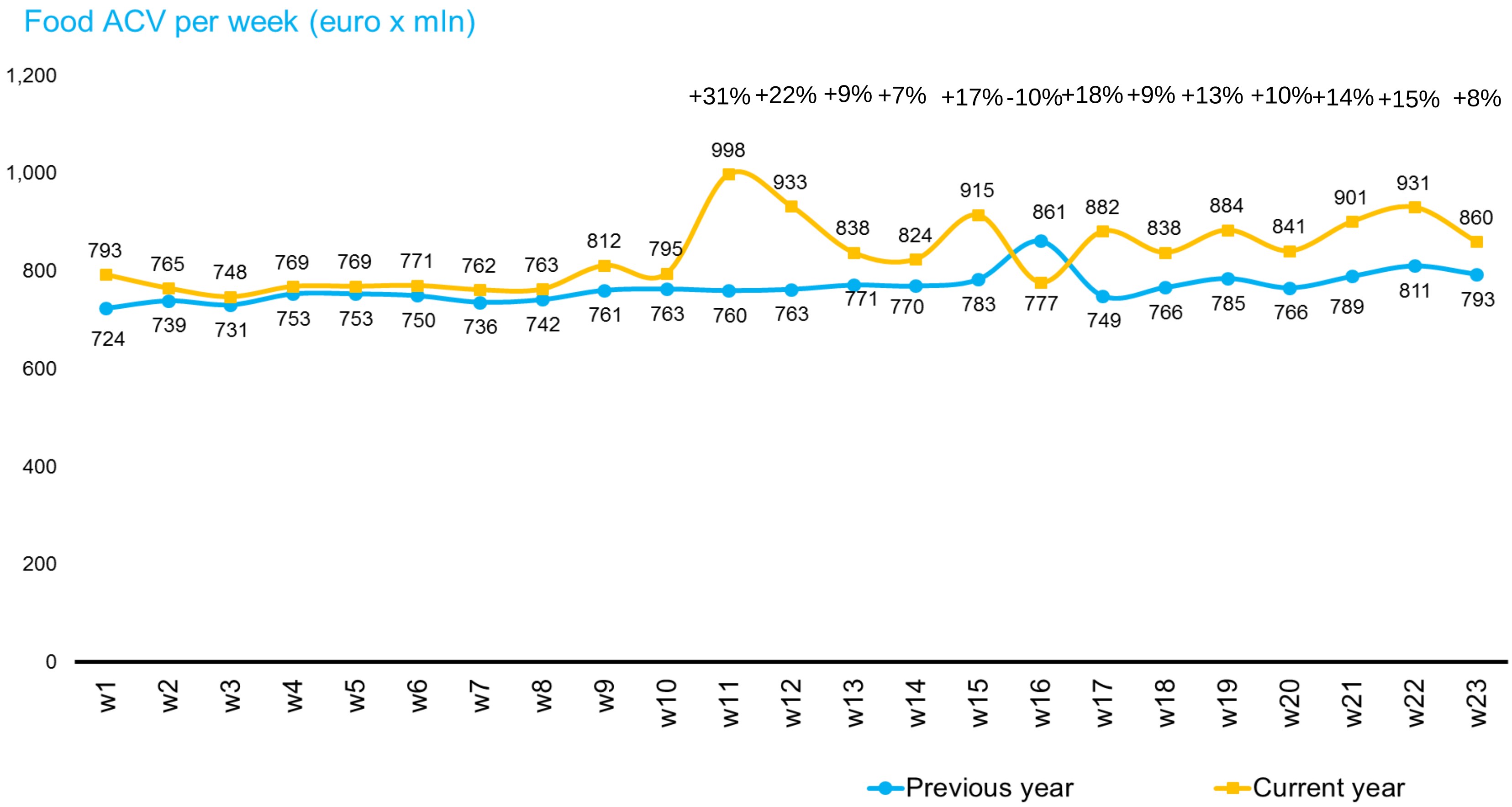
Update: June 16th, 2020

Weekly update

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

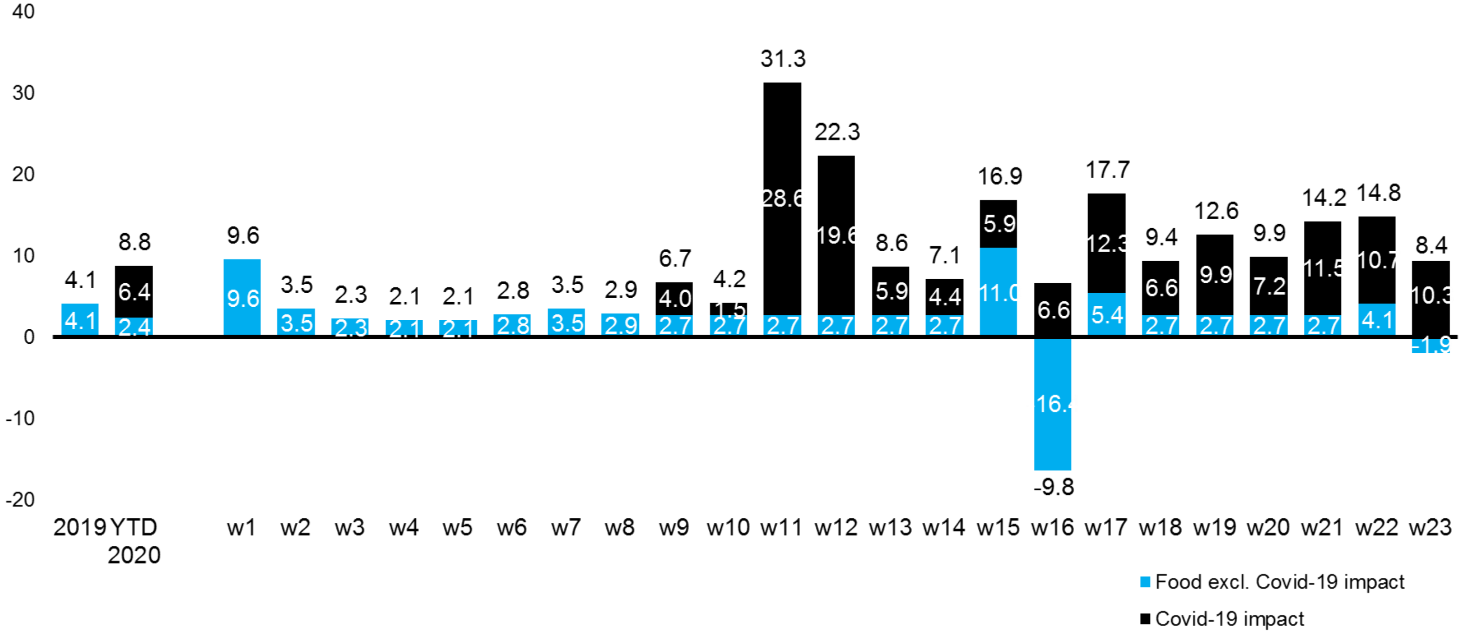
SUPERMARKETS

FOOD SALES PER WEEK



IMPACT OF COVID-19 ON SALES

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



Extra growth from wk9	Extra % growth from wk 9	Impact on % YTD growth
€ 1125M	**9.5%**	**6.4%**

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 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	wk 22 20	wk 23 20
Totaal Supermarkten (ACV)	8.8	2.7	11.5	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	14.8	8.4
Dranken Houdbaar	9.3	1.3	12.3	0.5	-0.6	24.0	15.0	4.6	7.0	21.1	-10.1	19.4	13.3	22.0	11.7	27.6	20.9	10.0
Kruidenierswaren	13.5	3.2	18.7	20.7	9.1	71.8	54.0	20.2	12.3	12.4	-4.0	22.0	7.6	9.2	12.3	10.3	14.3	8.0
Zoetwaren & Snacks	5.3	4.1	5.6	6.9	5.9	23.0	11.6	3.8	5.5	2.9	-17.2	12.2	2.9	1.3	5.1	8.1	9.3	4.0
Diepvries	15.4	4.4	20.1	6.1	0.2	45.1	38.5	14.9	15.2	33.3	1.0	33.2	18.9	25.5	16.6	21.1	18.5	16.7
Vers	7.8	2.6	10.1	5.1	3.6	24.8	17.9	8.8	7.7	19.6	-9.4	19.0	7.7	10.1	7.5	12.1	13.7	5.1
Schoonmaak & Onderhoud	11.5	2.4	16.9	26.1	1.7	46.5	56.3	30.1	10.5	-1.9	17.3	9.6	4.9	14.0	11.2	13.7	8.6	9.8
Drogmetica	13.0	2.8	18.3	26.1	25.4	82.5	83.5	33.8	2.3	-0.7	2.6	-7.2	6.3	3.3	12.1	-2.0	2.9	6.6
Haarverzorging	3.3	0.8	3.3	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	-8.2	6.7
Health Care	15.3	6.5	20.4	31.3	33.5	130.1	123.5	32.6	7.1	-1.6	-5.7	-12.4	-10.6	-11.2	-9.5	-9.0	-4.0	-1.9
Lichaamsverzorging	22.3	3.9	31.5	29.3	40.1	42.0	82.8	61.5	31.8	49.6	12.2	26.5	22.3	34.5	29.9	17.5	-0.5	19.4
Mondverzorging	9.8	11.5	9.5	41.9	77.1	-5.8	46.3	17.1	-13.7	-30.7	14.4	-7.9	44.3	-17.3	18.6	-11.6	9.8	-2.5
Papier	11.6	0.5	17.4	25.9	16.5	118.9	87.7	32.0	-4.5	-7.7	-3.6	-16.2	0.7	-2.7	11.8	-2.8	5.9	5.3
Rookwaren	5.7	2.7	6.9	-1.9	2.7	15.9	11.4	1.5	3.5	6.2	0.1	6.9	9.4	14.7	7.7	12.6	9.8	3.9

SALES INDEX ON CATEGORY LEVEL

Ranked on estimated impact of Covid-19

Overview categories

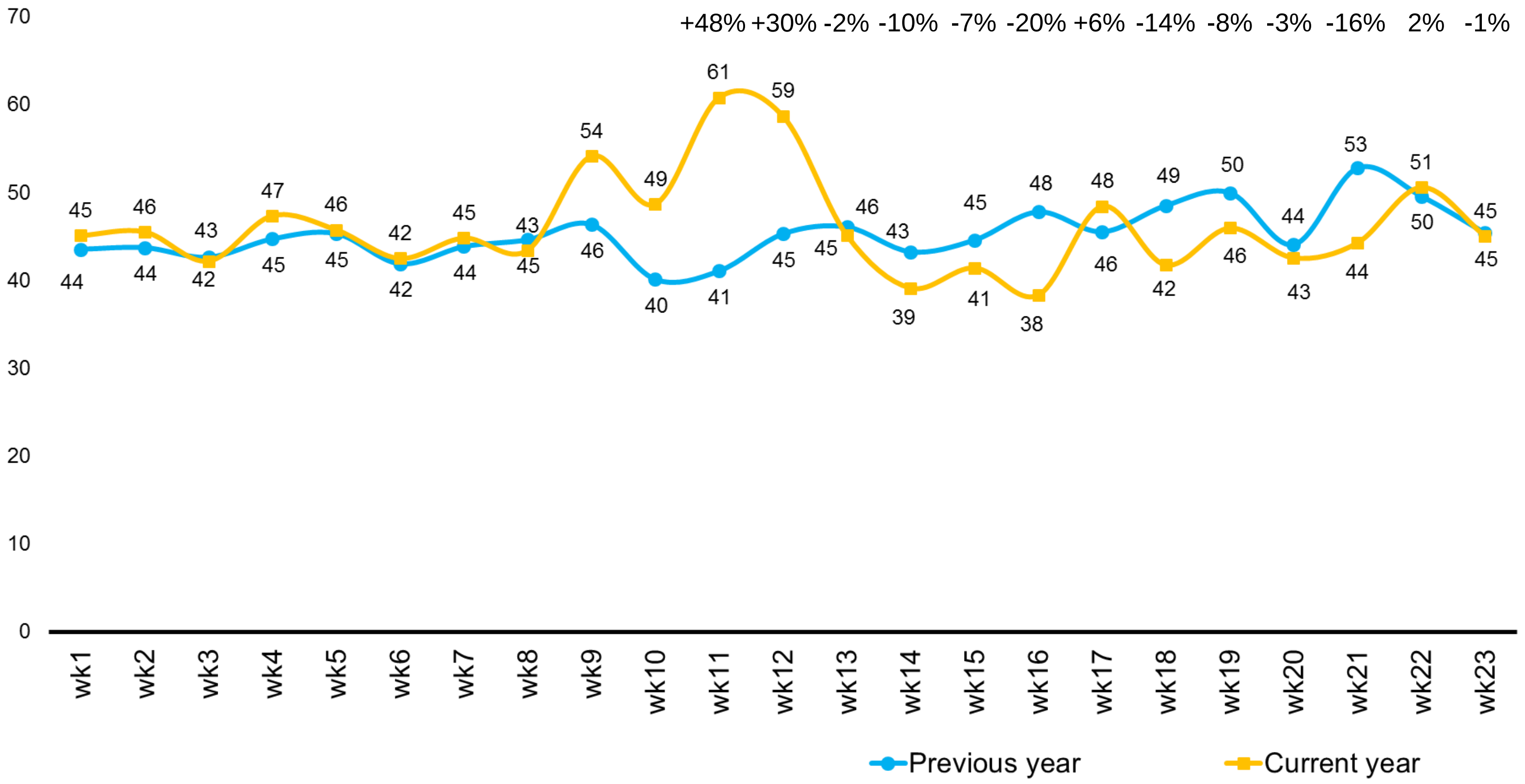
				Index € sales vs PY																
Category	Value index wk2-8 2020/2019	Value index from wk9 2020/2019	Est. Impact in € (000) Actual minus expected	wk2-8 20	YTD from wk 9 20	w9	w10	w11	w12	w13	w14	w15	w16	w17	w18	w19	w20	w21	w22	w23
Vlees	100	118	120,641	100	118	108	103	135	136	116	114	136	93	130	111	124	112	127	123	109
Fruit	104	117	85,771	104	117	107	106	126	126	126	122	130	116	123	116	116	105	111	119	110
Groenten	99	113	72,405	99	113	102	100	124	116	114	111	118	104	127	113	112	112	114	114	109
Bier	102	114	52,206	102	114	90	95	114	106	96	107	136	85	125	119	136	112	149	124	113
Stille Wijnen	96	112	42,315	96	112	100	93	101	110	100	108	134	89	131	118	119	112	134	125	104
Koffie excl. oplos	104	122	35,897	104	122	99	101	144	143	134	119	108	106	132	113	126	125	128	141	114
Zuivel	102	109	31,326	102	109	104	104	118	110	106	109	107	104	120	108	107	108	107	114	107
Kaas	103	109	30,049	103	109	107	102	126	115	107	107	113	88	119	107	108	108	113	113	106
Dv Ijs	107	131	27,218	107	131	102	105	114	103	120	125	210	83	169	138	184	128	133	127	122
Vleeswaren	103	108	16,721	103	108	107	104	123	113	107	105	116	87	117	106	106	108	107	109	106
Sauzen	103	119	16,132	103	119	104	106	130	132	119	121	147	82	134	119	126	116	136	131	101
Toiletpapier	104	121	15,977	104	121	131	134	255	187	140	94	90	95	82	99	91	111	102	112	104
Shag	100	108	15,656	100	108	99	100	115	113	103	106	103	101	108	110	116	112	115	115	110
Brood Afbak	105	128	15,269	105	128	104	106	202	166	144	157	182	50	131	124	132	118	152	130	114
Geelvet	102	113	15,205	102	113	107	101	140	142	121	103	123	80	127	109	109	117	115	110	105
Dv Snacks	105	124	14,995	105	124	110	103	148	142	123	128	124	125	133	127	121	122	130	115	116
Pindas Noten+Aanv	103	115	14,948	103	115	106	103	126	108	111	115	121	95	129	119	123	120	120	123	112
Groentenconserven	104	128	14,764	104	128	154	112	257	220	134	110	96	99	114	95	97	107	106	124	104
Huishoudreinigers	111	150	14,627	111	150	139	131	228	189	183	147	144	140	145	133	141	128	146	140	126
Smaakmakers	104	132	14,379	104	132	120	112	140	137	135	149	130	110	153	139	132	138	135	130	126

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	wk 22 20	wk 23 20
Drogmetica	2.0	1.6	2.1	16.8	21.4	48.1	29.6	-2.0	-9.5	-7.1	-19.8	6.4	-14.0	-8.1	-3.4	-16.1	2.0	-0.7
Deco.Cosmetica	-15.1	-1.0	-22.3	-0.9	5.3	-15.1	-36.8	-35.0	-38.6	-32.7	-37.1	-10.5	-27.5	-21.1	-12.4	-30.1	-18.6	-19.7
Geuren	-16.3	-1.6	-22.8	-10.6	-1.3	-15.6	-38.3	-52.8	-42.1	-39.6	-43.7	-9.1	-11.6	-11.3	-24.3	-33.4	-6.7	-16.3
Haarverzorging	5.7	6.9	5.1	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	6.3	8.5
Health Care	5.9	0.1	9.0	17.9	26.6	97.4	84.0	7.6	-9.3	-9.3	-18.1	-1.4	-17.1	-11.5	-6.9	-15.3	3.7	-6.1
Lichaamsverzorging	5.4	3.1	6.2	21.4	26.8	26.4	11.4	12.5	9.4	14.3	-22.0	19.9	-10.4	-0.3	-3.1	-4.9	4.3	8.6
Mondverzorging	1.2	4.2	-0.7	24.3	18.2	35.9	20.6	-13.6	-20.0	-22.8	-16.2	1.3	-14.0	-9.4	12.8	-31.1	14.8	5.8
Papier	1.5	-2.1	3.5	28.9	21.8	82.4	40.2	-15.0	-16.1	-14.5	-11.2	-0.3	-20.5	-14.0	-1.8	-18.3	-3.2	-0.5
Schoonmaak & Onderhoud	12.1	11.9	12.9	41.7	22.5	66.0	50.4	9.7	8.0	10.7	15.8	7.9	-14.6	-9.7	3.1	-10.2	8.4	12.9
Dranken Houdbaar	6.2	6.2	5.1	36.3	48.6	29.9	2.1	-19.6	2.1	22.4	-29.0	41.1	-30.7	-35.4	8.8	-9.4	5.2	49.0
Kruidenierswaren	-4.0	0.3	-6.0	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	-8.8	-8.7
Zoetwaren & Snacks	-2.2	4.0	-5.5	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	3.9	-0.3

SALES INDEX ON CATEGORY LEVEL - DRUG

Drug

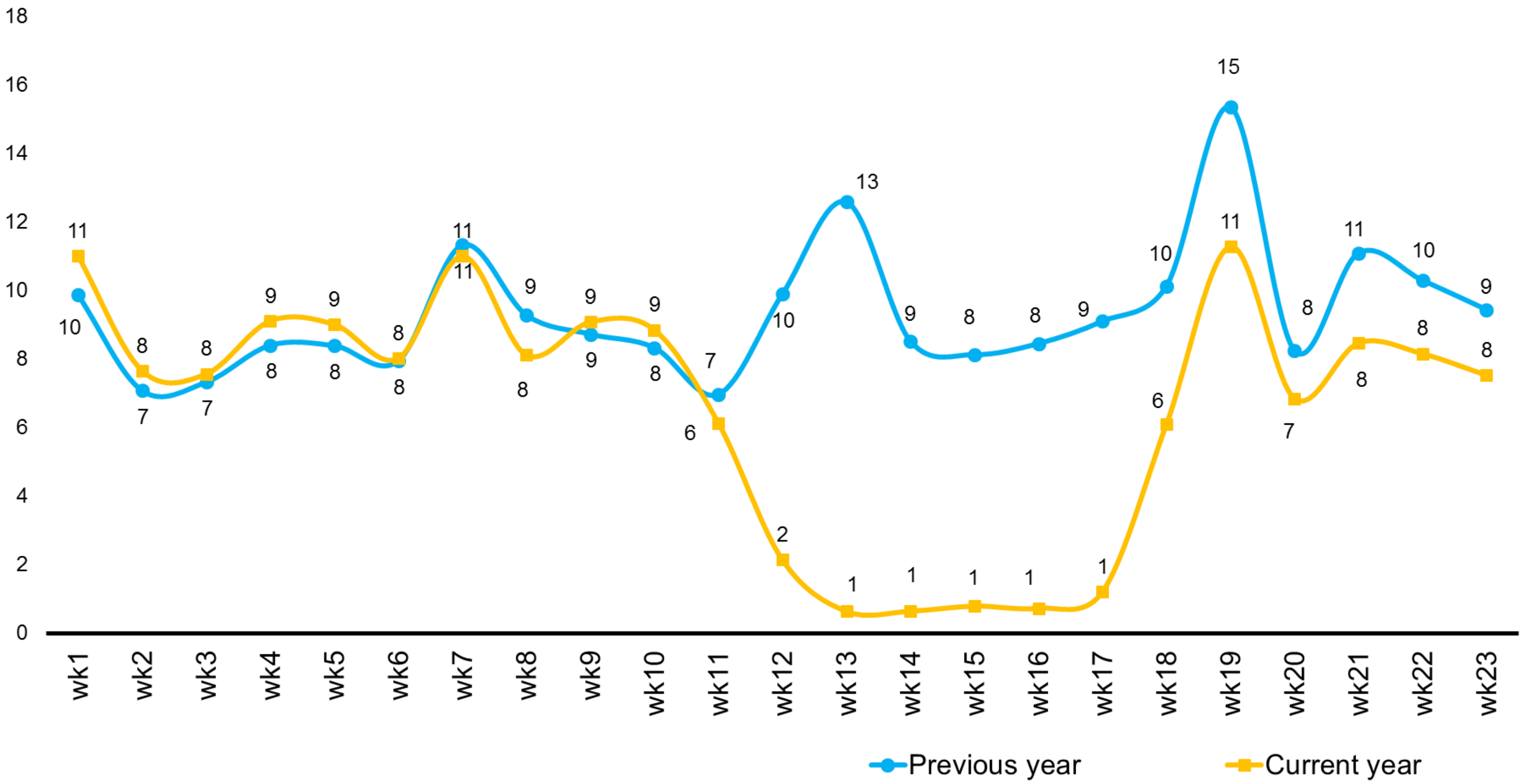
				Index € sales vs PY																
Category	Value index wk2-8 2020/2019	Value index from wk9 2020/2019	Impact in € (000) Actual minus expected	wk2-8 20	YTD from wk 9 20	w9	w10	w11	w12	w13	w14	w15	w16	w17	w18	w19	wk 20	wk 21	wk 22	wk 23
Vit/Mineralen Suppl.	99	124	11,289	99	124	129	132	206	215	126	110	102	100	117	97	89	103	90	115	102
Toiletzeep	123	270	8,922	123	270	462	382	482	376	219	237	200	212	240	185	186	298	173	236	196
Hand/Bodyproducten	92	120	5,930	92	120	108	122	132	128	174	149	117	105	142	103	103	97	97	125	113
Haarkleurmiddelen	106	133	4,991	106	133	107	113	122	137	183	165	129	147	176	136	122	135	93	113	122
Otc Hoest Verkoudheid En Griep	94	112	4,603	94	112	105	129	244	227	122	83	93	68	90	73	88	79	80	113	102
Pijnstillers	107	116	2,461	107	116	134	147	318	253	103	84	74	70	84	74	79	84	73	86	85
Vochtige Doekjes	99	123	1,795	99	123	155	152	227	187	95	129	91	103	143	82	108	117	85	114	115
Diagnostica	101	331	1,006	101	331	236	397	836	656	151	177	489	360	294	233	228	235	173	196	255
Celstofbabyluiers	89	93	926	89	93	125	100	155	114	74	71	84	79	90	70	76	91	83	89	93
Huishoudreinigers	99	146	901	99	146	156	155	311	427	159	135	132	89	93	80	98	112	101	131	98
Schoonmaakhulpmiddelen	74	156	657	74	156	143	162	193	208	125	179	286	220	167	135	113	105	103	145	116
Tissues Droog	102	146	614	102	146	149	145	266	245	163	137	104	120	142	109	114	137	107	121	118
Papieren Zakdoekjes	103	144	613	103	144	200	211	386	314	112	80	63	97	103	82	89	102	78	123	101
Toiletpapier	85	100	573	85	100	136	130	358	106	113	83	74	74	46	69	83	93	78	41	151
Voetverzorging	100	101	413	100	101	103	107	111	85	86	94	113	100	121	92	113	117	88	100	94
Vaatwasmiddelen	101	128	281	101	128	96	143	362	110	105	63	54	99	238	64	50	268	196	334	100
Schuimbadproducten	101	102	242	101	102	124	118	130	114	101	96	76	95	126	95	86	99	89	109	97
Keukenpapier	120	135	214	120	135	140	148	229	141	99	99	102	156	122	79	101	121	194	154	119
Toiletreinigers	69	167	188	69	167	27	71	135	140	89	506	300	129	161	136	184	193	453	195	158
Zonnecosmetica	92	94	164	92	94	56	108	85	37	57	84	275	42	92	60	150	62	129	96	124

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

PERFUMERY CHANNEL

PERFUMERY SALES PER WEEK

Drogmetica in Perfumery per week (euro x mln)



BE A STEP AHEAD WITH WEEKLY UPDATES

COVID-19 IS MOVING FAST, BUT YOU CAN BE FASTER.
CONTACT YOUR NIELSEN REPRESENTATIVE TO FIND OUTHOW 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.

"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.