COVID-19 CRISIS

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

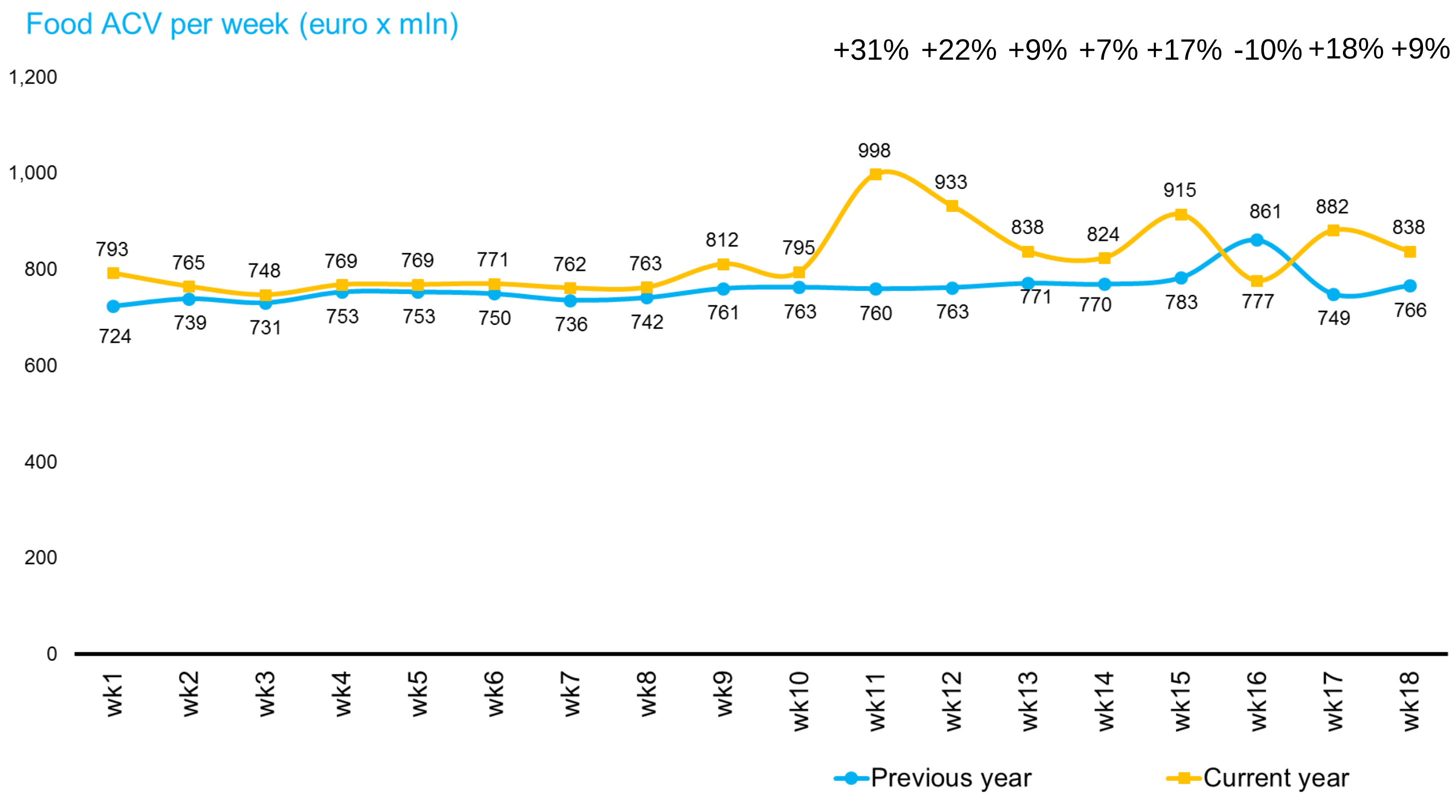
Update: May 11th, 2020

Weekly update

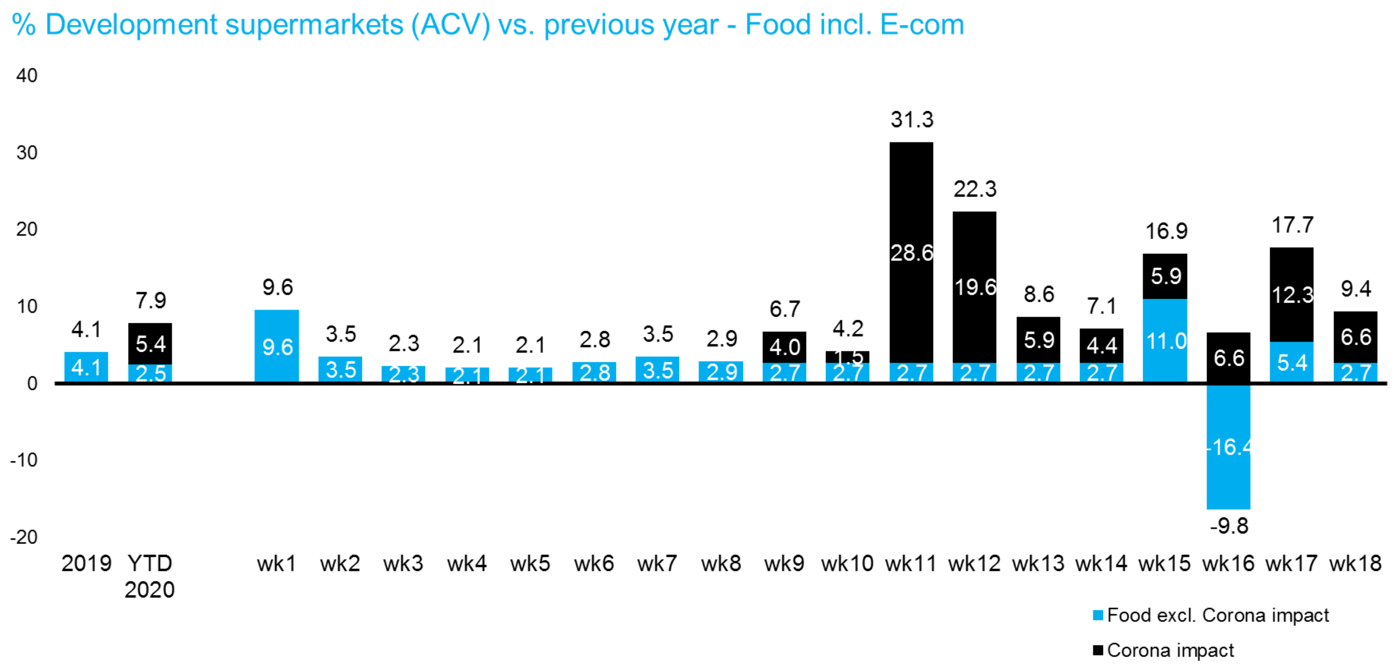
- Impact of COVID-19 on Supermarket Channel
- Drug Channel
- Perfumery Channel

SUPERMARKETS

SALES BACK TO NEW NORMAL



€ 734M+ SALES DUE TO COVID-19



Extra growth from wk9	Extra % growth from wk 9	Impact on % YTD growth
€ 734M	**9.3%**	**5.4%**

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 time the % value growth of weeks 2-8, so the weeks prior to the Corona crisis and excluding week 1 as this is an a-typical week. Base for the +5,4% in week 17, is the average decline of post-Easter in previous and the effect of Kings day.

STRONG GROWTH IN FROZEN AND ORAL CARE

Positive weather effect causing growth for Frozen, promo effect for Oral Care

% 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
Totaal Supermarkten (ACV)	7.9	2.7	11.2	6.7	4.2	31.3	22.3	8.6	7.1	16.9	-9.8	17.7	9.4
Dranken Houdbaar	6.3	1.3	8.8	0.5	-0.7	23.9	14.9	4.5	6.8	20.7	-10.4	18.7	12.7
Kruidenierswaren	14.1	3.2	22.4	20.7	9.1	71.8	53.8	20.1	12.1	12.2	-4.2	21.7	7.2
Zoetwaren & Snacks	5.0	4.0	5.2	6.8	5.5	22.7	11.4	3.5	5.2	2.6	-17.5	11.3	2.3
Diepvries	14.0	4.4	20.3	6.1	0.2	45.1	38.4	14.8	15.0	33.0	0.8	32.9	18.8
Vers	6.9	2.6	9.8	5.0	3.5	24.6	17.7	8.4	7.2	19.0	-9.9	18.2	6.8
Schoonmaak & Onderhoud	11.3	2.4	19.5	26.1	1.7	46.3	56.0	29.8	10.2	-2.2	16.9	9.2	4.4
Drogmetica	14.9	2.8	24.5	26.1	25.3	82.5	83.1	33.2	1.3	-2.6	1.0	-8.9	4.6
Haarverzorging	5.0	0.8	6.3	0.2	-10.7	31.7	39.0	11.4	1.8	-7.8	25.2	-10.0	-11.3
Health Care	20.7	6.6	32.9	31.3	33.5	129.9	122.3	31.7	6.2	-2.2	-6.3	-13.1	-10.6
Lichaamsverzorging	22.2	3.9	36.8	29.3	40.1	42.0	82.6	61.4	31.1	44.2	9.0	21.1	17.3
Mondverzorging	12.8	11.5	14.6	41.9	77.1	-5.8	46.3	17.1	-13.7	-30.7	14.4	-7.9	44.0
Papier	13.3	0.5	23.4	25.9	16.3	118.8	87.3	31.1	-6.0	-9.5	-5.2	-17.6	-0.9
Rookwaren	3.2	2.2	3.5	-2.7	1.7	14.8	10.3	0.5	2.5	5.2	-0.9	4.4	0.4

HIGHEST IMPACT IN € ON MEAT

Fruit and vegetables complete top 3

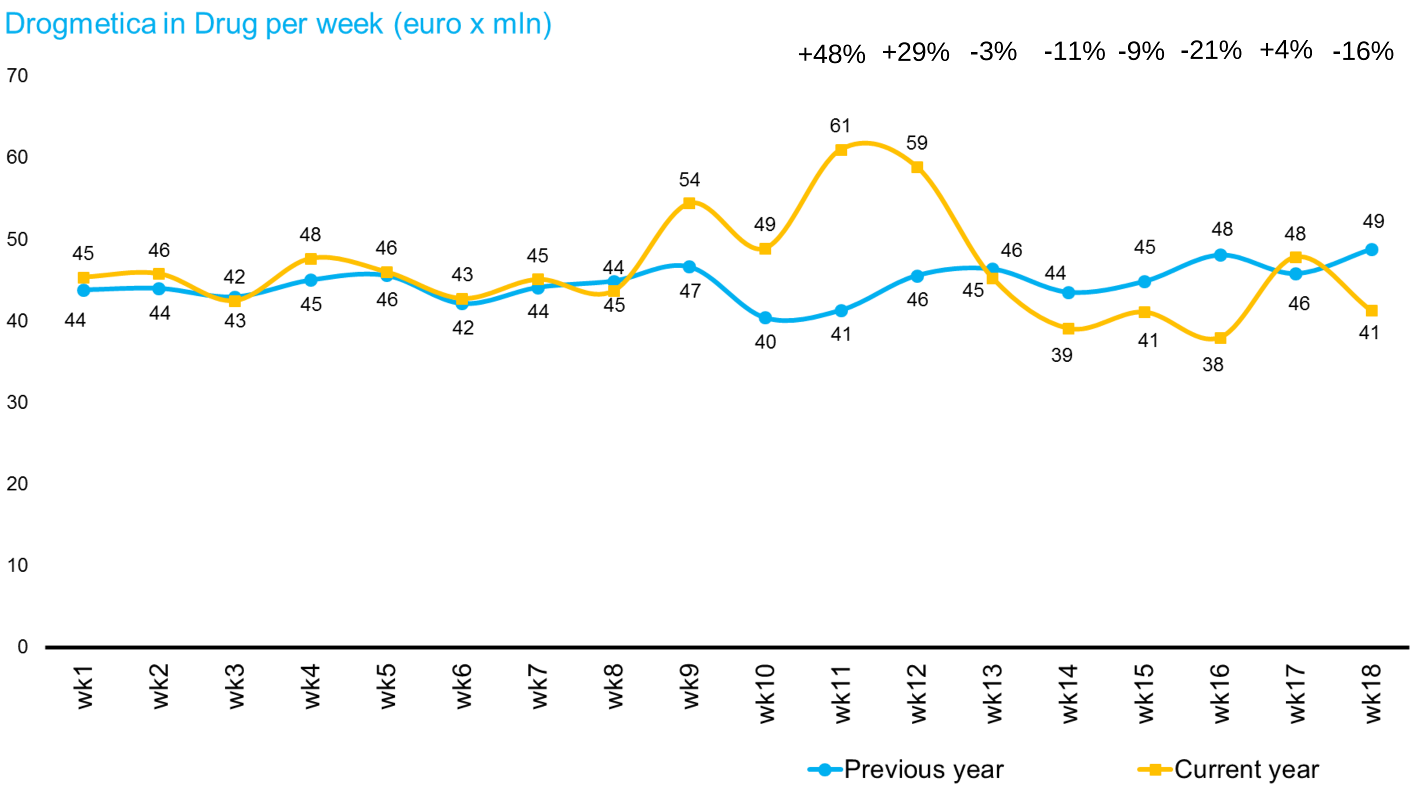
Overview categories

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
Vlees	101	119	82,234	101	119	108	104	136	137	117	115	137	94	131	112
Fruit	104	119	62,467	104	119	107	106	126	126	125	121	129	115	122	115
Groenten	99	112	43,632	99	112	102	100	124	116	113	109	117	102	124	110
Koffie excl. oplos	104	119	20,676	104	119	99	101	144	142	134	119	108	106	132	113
Zuivel	102	109	20,278	102	109	104	104	118	110	106	108	106	103	119	108
Stille Wijnen	96	107	19,876	96	107	100	93	101	110	100	107	133	88	129	117
Kaas	102	108	17,271	102	108	106	101	125	114	106	106	112	88	118	105
Toiletpapier	104	129	15,520	104	129	131	134	255	186	139	91	88	92	80	97
Bier	102	107	14,429	102	107	90	95	114	106	96	107	136	85	125	119
Groentenconserven	104	138	14,156	104	138	154	112	257	220	134	110	96	99	113	95
Dv Ijs	107	127	13,420	107	127	102	105	114	103	120	125	208	83	168	137
Geelvet	102	115	11,408	102	115	107	101	140	142	121	103	123	80	127	109
Huishoudreinigers	111	156	11,282	111	156	139	131	228	188	182	146	144	139	144	131
Dv Snacks	105	126	11,001	105	126	110	103	148	142	123	127	124	125	133	127
Bakproducten	102	176	10,804	102	176	144	114	216	262	228	199	186	117	176	134
Vleeswaren	103	108	10,565	103	108	107	104	122	113	106	104	116	86	116	105
Brood Afbak	106	129	10,485	106	129	104	106	203	166	145	158	183	50	131	125
Smaakmakers	104	132	9,580	104	132	120	112	140	136	135	149	129	110	153	139
Toiletzeep	104	324	9,473	104	324	341	336	472	521	357	287	253	228	224	207
Sauzen	103	118	9,472	103	118	104	106	130	132	119	121	147	81	133	118

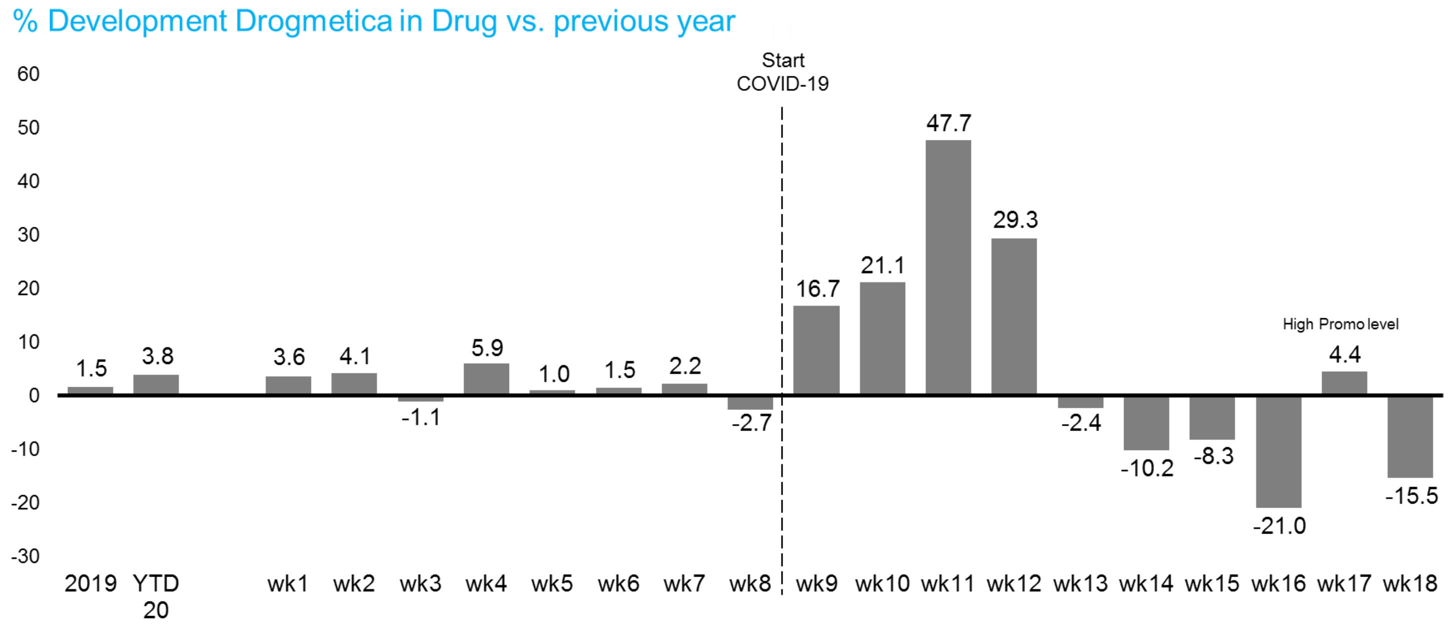
Note: 1) estimated impact is the difference between the actual sales and the expected sales. The expected sales is based on the sales of previous year multiplied by the % value growth of week 2-8, so the weeks prior to the Corona crisis and excluding week 1 as this is an a-typical week.

DRUG CHANNEL

SALES DECLINE AGAIN IN WEEK 18



DRUG SALES DECLINE AGAIN



Note: Due to sales fluctuations caused by promotions in recent weeks, we stopped our estimation of the additional growth due to COVID-19.

DECLINE IN ALL SUPERGROUPS

Biggest negative impact in € on Health Care and Body Care

% 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
Drogmetica	3.8	1.6	5.4	16.7	21.1	47.7	29.3	-2.4	-10.2	-8.3	-21.0	4.4	-15.5
Deco.Cosmetica	-13.6	-1.0	-23.4	-1.0	5.1	-15.4	-37.1	-35.4	-39.1	-33.2	-37.5	-11.1	-28.6
Geuren	-16.7	-1.6	-27.9	-10.6	-1.6	-15.8	-38.5	-53.2	-42.6	-40.5	-45.1	-13.5	-14.9
Haarverzorging	7.2	6.9	7.4	14.6	17.7	21.6	12.5	6.6	-2.0	-8.3	-3.8	17.9	-0.3
Health Care	9.0	0.2	16.2	17.7	26.3	96.3	83.0	7.1	-10.3	-10.5	-19.6	-3.5	-18.0
Lichaamsverzorging	6.3	3.0	8.4	21.3	26.7	26.2	11.2	12.2	8.8	12.1	-23.3	17.7	-12.2
Mondverzorging	2.5	4.2	0.8	24.3	18.2	35.8	20.6	-13.7	-20.1	-22.8	-16.4	0.5	-15.0
Papier	3.3	-1.9	7.8	28.3	21.0	80.1	39.1	-14.9	-16.5	-15.8	-14.0	-3.3	-23.9
Schoonmaak & Onderhoud	16.0	11.9	20.6	41.7	22.5	65.8	50.2	9.6	7.9	10.3	15.5	7.5	-15.1
Dranken Houdbaar	7.5	6.2	6.6	36.3	48.6	29.9	2.1	-19.6	2.1	22.3	-29.0	40.8	-30.9
Kruidenierswaren	-3.1	0.3	-5.4	19.9	5.9	63.6	26.9	-22.3	-32.7	-39.7	-33.0	-24.9	-24.8
Zoetwaren & Snacks	-1.5	4.0	-5.9	13.7	14.6	25.3	-1.6	-16.7	-18.0	-16.6	-34.6	0.0	-22.5

SOAP KEEPS SHOWING HIGH GROWTH

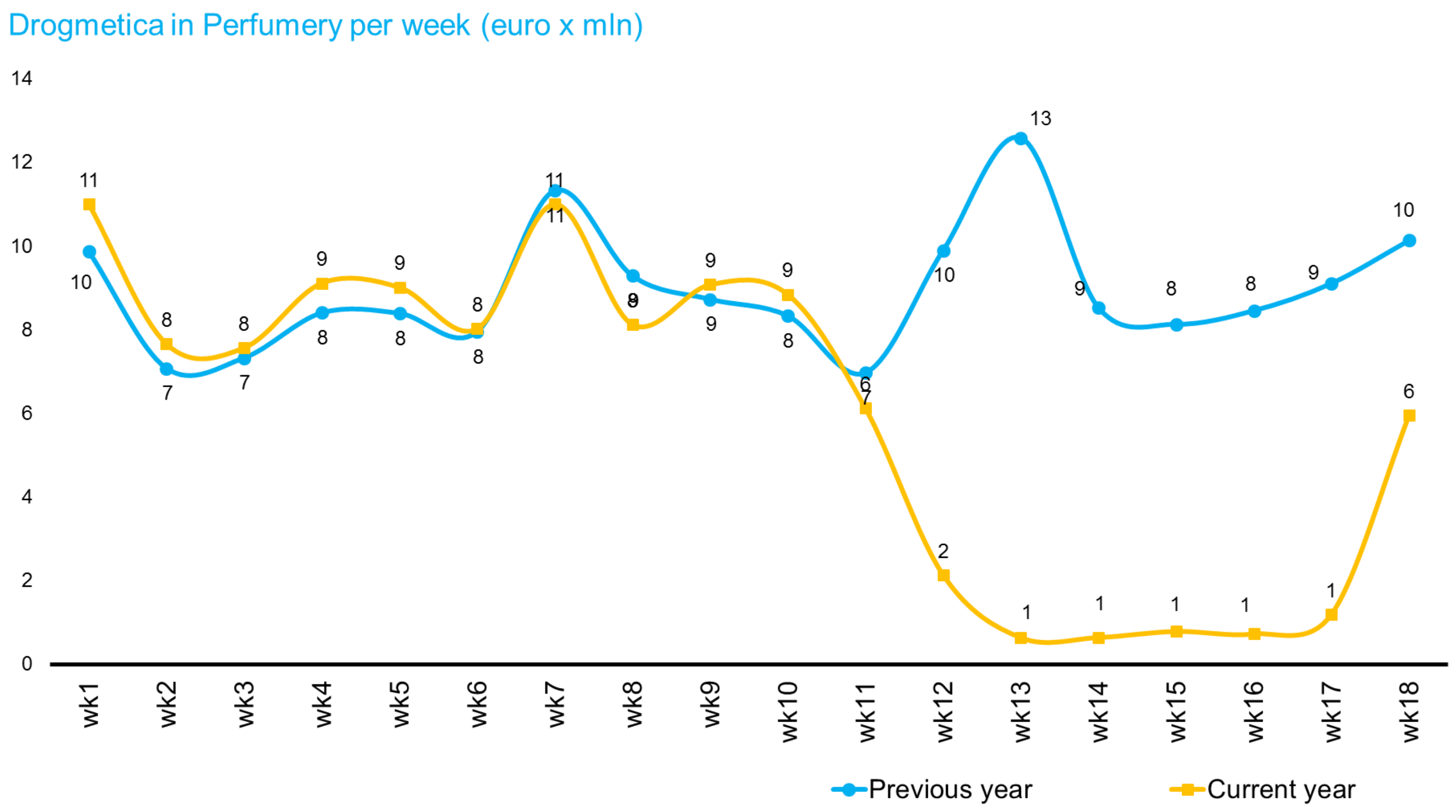
De-stocking visible in several categories

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
Vit/Mineralen Suppl.	99	135	11,180	99	135	129	132	206	215	125	109	101	97	114	95
Toiletzeep	123	291	6,641	123	291	462	382	481	375	218	232	178	192	216	166
Otc Hoest Verkoudheid En Griep	94	120	5,217	94	120	105	129	244	227	122	83	92	67	89	72
Hand/Bodyproducten	93	128	5,022	93	128	109	123	132	128	175	150	118	105	142	104
Pijnstillers	107	133	4,985	107	133	134	147	318	253	103	84	74	70	84	74
Haarkleurmiddelen	106	142	4,305	106	142	107	113	122	137	183	165	129	147	176	135
Vochtige Doekjes	99	131	1,557	99	131	155	152	227	187	95	129	91	103	143	82
Huishoudreinigers	99	166	854	99	166	156	155	311	427	159	135	132	89	93	80
Diagnostica	101	383	847	101	383	236	397	836	656	151	177	489	359	294	232
Schuimbadproducten	101	106	780	101	106	124	118	130	114	101	95	76	94	123	91
Celstofbabyluiers	89	94	744	89	94	125	100	154	114	73	70	81	75	84	60
Toiletpapier	85	110	684	85	110	136	130	358	106	113	83	74	74	46	69
Papieren Zakdoekjes	103	158	603	103	158	200	207	380	305	109	77	61	96	100	81
Schoonmaakhulpmiddelen	74	176	571	74	176	143	162	193	208	125	179	286	220	166	134
Tissues Droog	102	158	533	102	158	149	145	266	245	163	137	104	120	142	109
Wasmiddelen	111	122	468	111	122	161	97	157	144	115	126	102	111	116	91
Gelaatsproducten	106	104	456	106	104	109	117	94	102	113	110	89	95	129	89
Scheermesjes	102	105	205	102	105	121	118	105	91	110	114	96	90	126	85
Voetverzorging	100	100	193	100	100	103	107	110	85	86	93	112	99	120	91
Vaatwasmiddelen	101	119	153	101	119	96	143	362	110	105	63	54	99	238	64

PERFUMERY CHANNEL

PERFUMERY STORES ARE OPENING AGAIN



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

COVID-19'S IMPACT ON CONSUMERS

NEW SYNDICATED STUDY

CONTACT YOUR NIELSEN REPRESENTATIVE ON HOW THE DUTCH CONSUMER BEHAVIOR IS CHANGING DUE TO COVID-19

MARKET SENTIMENT

Lifestyle changes, shopping, social & entertainment activities, the new "normal" behavior

E-COMMERCE ECOSYSTEM

Change in shopping behavior across different channels, including online vs offline to mega product categories

CATEGORIES ON DEMAND

Current shopping behavior with current consumption, embedding sales trend data, and tenure of impact

TRAVEL BEHAVIOR

Impact on leisure and business travel in the next six months, including summer vacations, due to COVID-19

“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.

This artwork was created using Nielsen data.