COVID-19 CRISIS

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

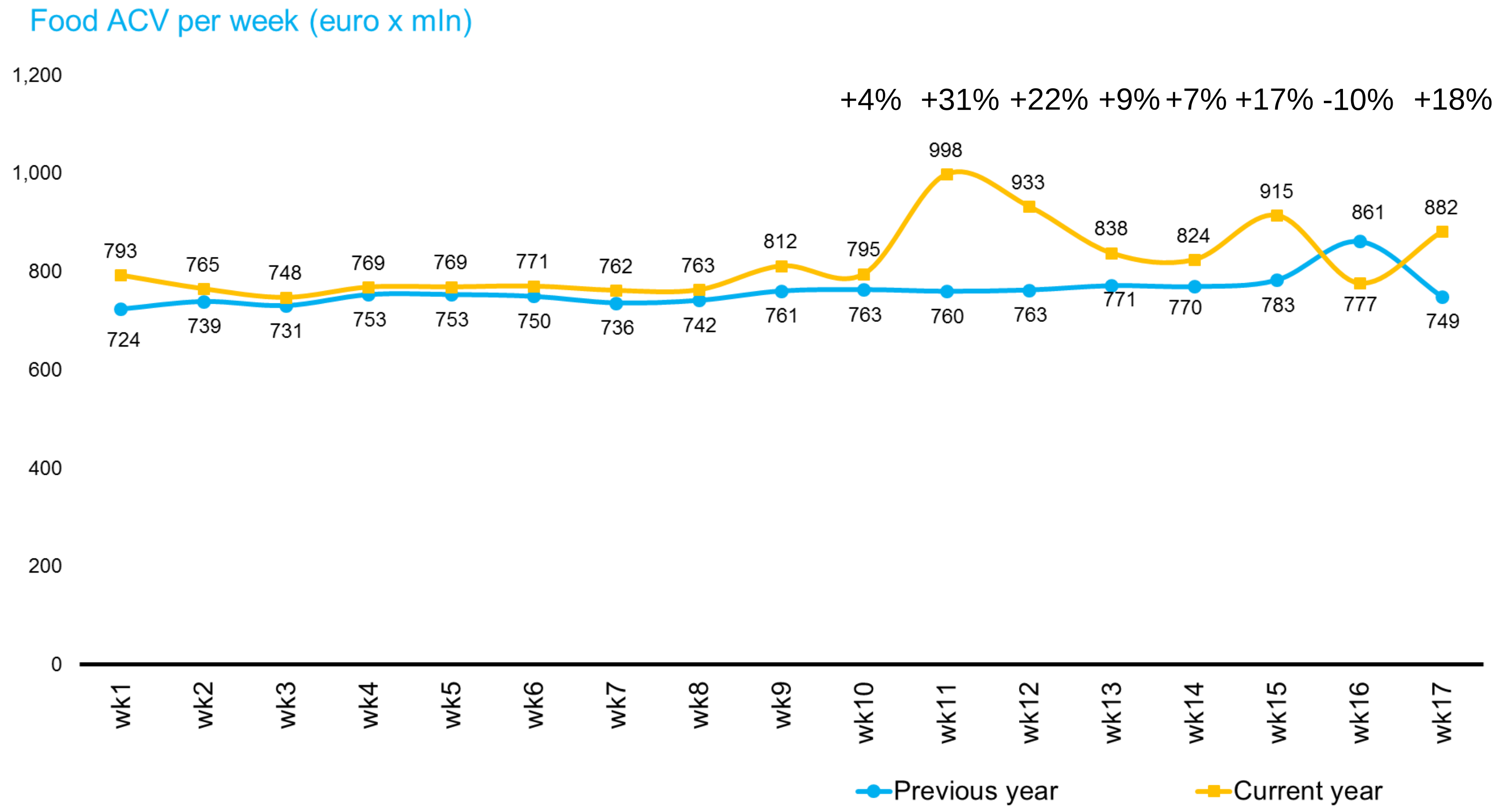
Update: May 6th, 2020

Weekly update

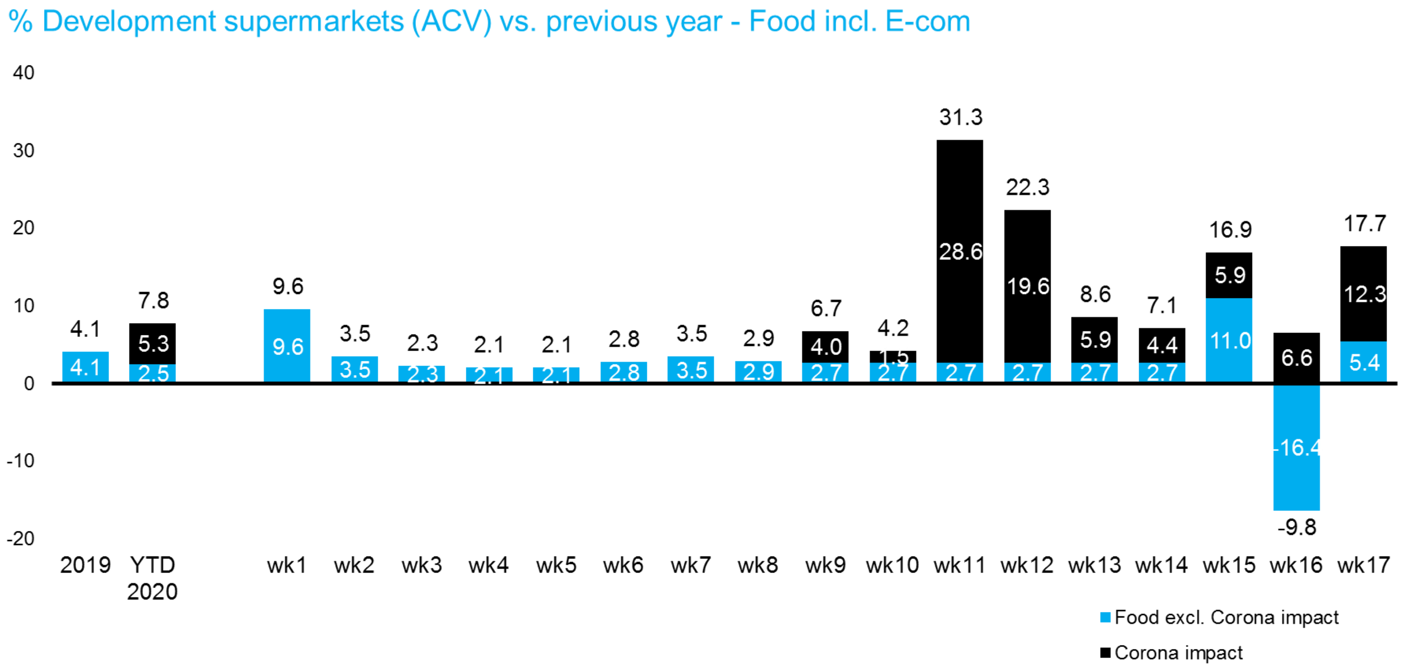
- Impact of COVID-19 on Supermarket Channel
- Drug Channel
- Perfumery Channel

SUPERMARKETS

SALES STAY HIGH, POSITIVE KINGS DAY IMPACT



€ 682M+ SALES DUE TO COVID-19



Extra growth from wk9	Extra % growth from wk 9	Impact on % YTD growth
€ 682M	**9.6%**	**5.3%**

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, KW AND FRESH

Still de-stocking in Paper and Drogmetica

% 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
Totaal Supermarkten (ACV)	7.8	2.7	10.6	6.7	4.2	31.3	22.3	8.6	7.1	16.9	-9.8	17.7
Dranken Houdbaar	5.9	1.3	8.3	0.5	-0.7	23.9	14.9	4.5	6.8	20.6	-10.5	18.6
Kruidenierswaren	14.5	3.2	24.2	20.7	9.1	71.8	53.8	20.1	12.1	12.2	-4.3	21.6
Zoetwaren & Snacks	5.2	4.0	5.5	6.8	5.5	22.7	11.4	3.5	5.2	2.6	-17.6	11.3
Diepvries	13.7	4.4	20.4	6.1	0.2	45.1	38.4	14.8	15.0	33.0	0.8	32.9
Vers	6.9	2.6	10.0	5.0	3.5	24.5	17.6	8.3	7.1	18.9	-10.0	17.9
Schoonmaak & Onderhoud	11.7	2.4	21.2	26.1	1.7	46.2	55.7	29.8	10.2	-2.3	16.8	9.1
Drogmetica	15.5	2.8	26.6	26.1	25.3	82.5	83.1	33.2	1.1	-2.7	0.9	-8.9
Haarverzorging	6.0	0.8	8.3	0.2	-10.7	31.7	39.0	11.4	1.8	-7.8	25.2	-10.0
Health Care	22.3	6.6	37.3	31.3	33.5	129.9	122.3	31.7	6.2	-2.2	-6.3	-13.1
Lichaamsverzorging	22.5	3.9	39.0	29.3	40.1	42.0	82.6	61.4	31.1	44.2	9.0	21.1
Mondverzorging	11.1	11.5	11.7	41.9	77.1	-5.8	46.3	17.1	-13.7	-30.7	14.4	-7.9
Papier	14.0	0.5	26.0	25.9	16.3	118.8	87.3	31.0	-6.3	-9.7	-5.3	-17.6
Rookwaren	3.7	2.4	4.2	-2.1	2.5	15.7	11.2	1.2	3.0	5.9	-0.5	2.1

HIGHEST IMPACT IN € ON MEAT

Fruit and vegetables complete top 3

Overview CPG categories

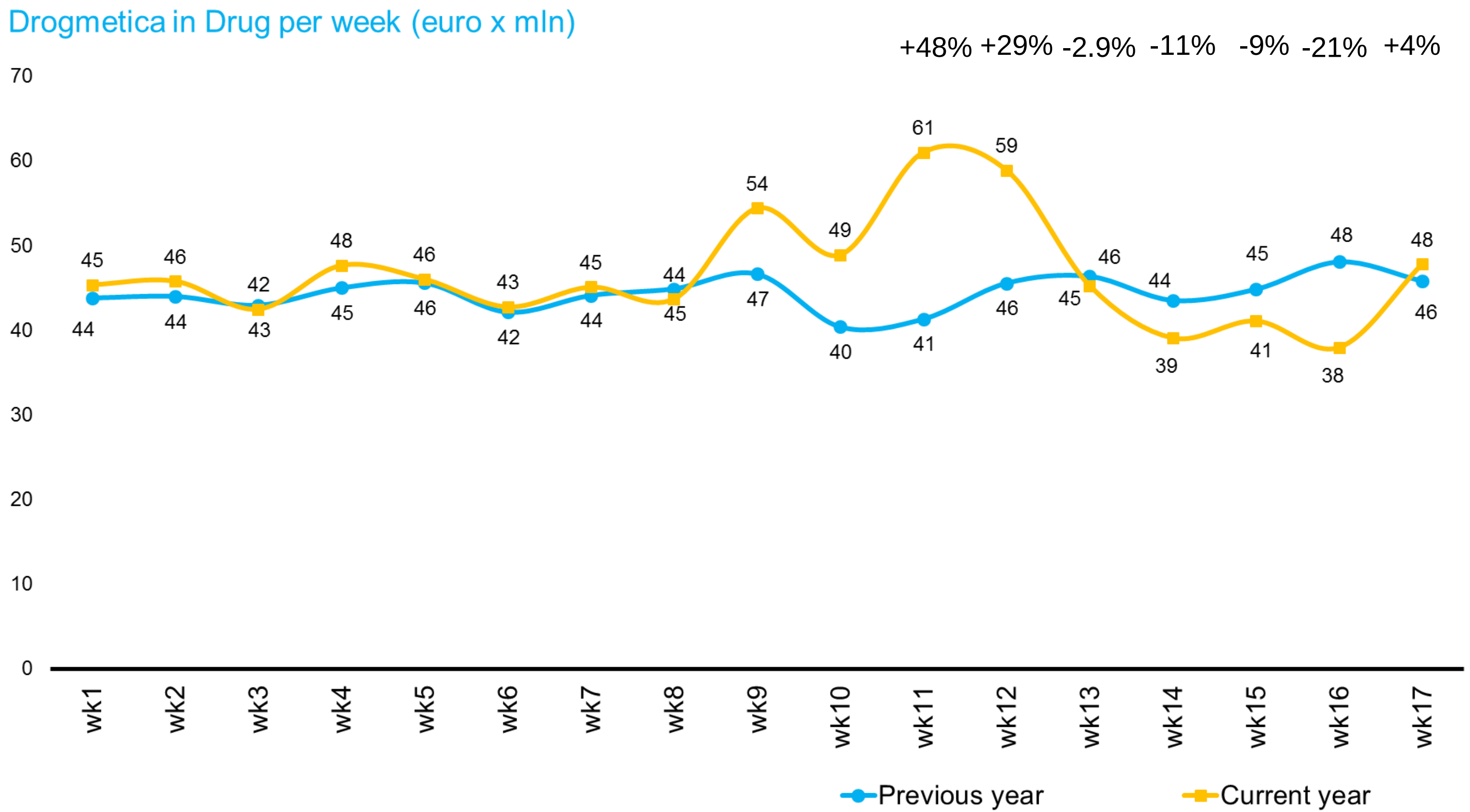
				Index € sales vs PY										
Category	Value index wk2-8 2020/2019	Value index from wk9 2020/2019	Est. Impact in € (000) Actual minus expected	wk2-8 20	YTD from wk 9 20	w9	w10	w11	w12	w13	w14	w15	w16	w17
Vlees	101	119	74,971	101	119	108	103	136	137	117	115	137	94	130
Fruit	104	120	57,609	104	120	107	106	126	126	125	121	129	115	122
Groenten	99	112	39,855	99	112	102	100	124	116	113	109	117	102	124
Koffie	104	120	19,523	104	120	99	101	144	142	134	119	108	106	132
Zuivel	102	109	18,517	102	109	104	104	118	110	106	108	106	103	119
Kaas	102	108	16,480	102	108	106	101	125	114	106	106	112	88	118
Stille Wijnen	96	106	16,077	96	106	100	93	101	110	100	107	133	88	129
Toiletpapier	104	132	15,944	104	132	131	134	255	186	138	91	87	92	80
Groentenconserven	104	144	14,589	104	144	154	112	257	220	134	110	96	99	113
Dv Ijs	107	126	11,303	107	126	102	105	114	102	120	125	208	83	168
Geelvet	102	115	10,808	102	115	107	101	140	142	121	103	123	80	127
Huishoudreinigers	111	159	10,734	111	159	139	131	228	188	182	146	144	139	144
Bakproducten	102	181	10,287	102	181	144	114	216	262	228	199	186	117	176
Vleeswaren	103	108	10,145	103	108	107	104	122	112	106	104	115	86	116
Dv Snacks	105	126	9,853	105	126	110	103	148	142	123	127	124	125	133
Bier	102	106	9,788	102	106	90	95	114	106	96	107	136	85	125
Brood Afbak	106	129	9,672	106	129	104	106	203	166	145	157	182	50	131
Toiletzeep	104	338	8,986	104	338	341	336	472	521	357	287	253	228	224
Eetdeegwaren	103	133	8,874	103	133	120	115	238	181	115	101	101	110	117
Maaltijdversierders	103	128	8,722	103	128	118	107	199	178	125	104	92	115	111

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. 2) Filter coffee is not in Koffie

DRUG CHANNEL

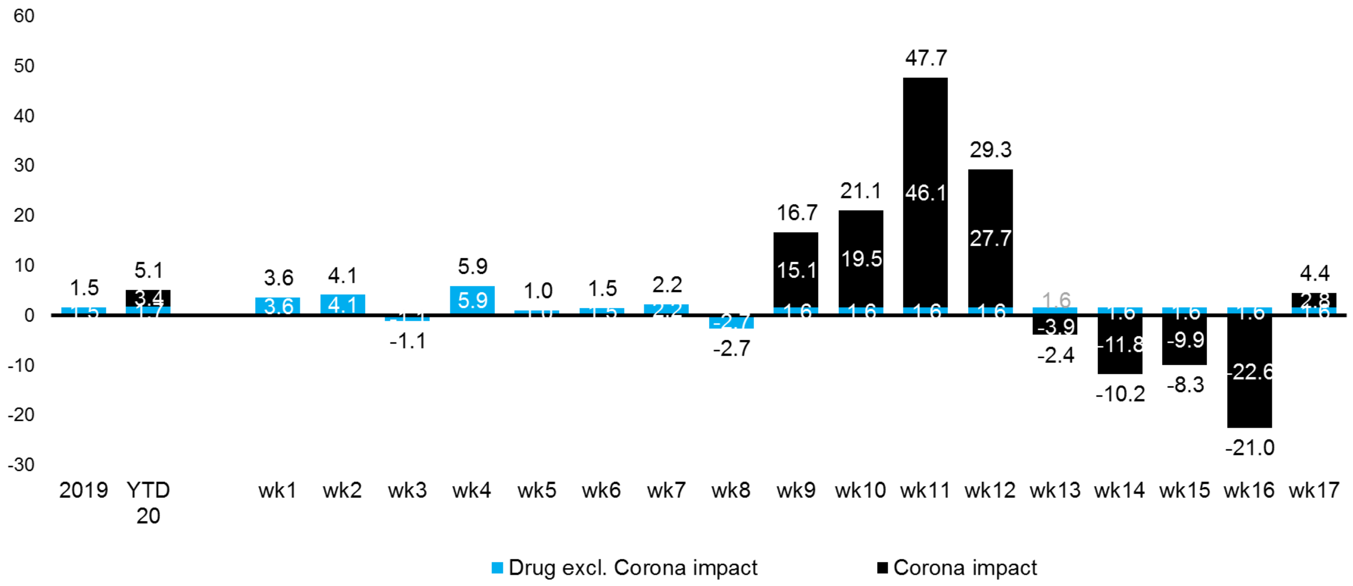
HIGHER SALES IN WEEK 17 AS IN 2019

Impact of deep Kingsday promo's



STILL €26M EXTRA COVID-19 GROWTH

% Development Drogmetica in Drug vs. previous year



Extra growth from wk9	Extra % growth from wk 9	Impact on % YTD growth
€ 26M	**6.3%**	**3.4%**

SMALL GROWTH AGAIN IN DRUG

Still decline in many supergroups

% 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
Drogmetica	5.1	1.6	8.0	16.7	21.1	47.7	29.3	-2.4	-10.2	-8.3	-21.0	4.4
Deco.Cosmetica	-12.7	-1.0	-22.8	-1.0	5.0	-15.4	-37.1	-35.4	-39.1	-33.2	-37.6	-11.1
Geuren	-16.8	-1.6	-29.9	-10.6	-1.6	-15.8	-38.5	-53.2	-42.6	-40.5	-45.1	-13.5
Haarverzorging	7.7	6.9	8.3	14.6	17.7	21.6	12.5	6.6	-2.0	-8.3	-3.8	17.9
Health Care	10.5	0.2	20.2	17.7	26.3	96.3	83.0	7.1	-10.3	-10.5	-19.6	-3.5
Lichaamsverzorging	7.6	3.0	11.0	21.3	26.7	26.2	11.2	12.2	8.8	12.1	-23.3	17.7
Mondverzorging	3.6	4.2	2.7	24.3	18.2	35.8	20.6	-13.7	-20.1	-22.8	-16.4	0.5
Papier	5.0	-1.9	11.6	28.3	21.0	80.1	39.1	-14.9	-16.5	-15.8	-14.0	-3.3
Schoonmaak & Onderhoud	18.2	11.9	25.6	41.7	22.5	65.8	50.2	9.6	7.9	10.3	15.5	7.5
Dranken Houdbaar	10.6	6.2	12.2	36.3	48.6	29.9	2.0	-19.6	2.1	22.3	-29.0	40.8
Kruidenierswaren	-1.9	0.3	-3.3	19.8	5.9	63.6	26.9	-22.3	-32.7	-39.7	-33.0	-25.0
Zoetwaren & Snacks	-0.2	4.0	-3.9	13.7	14.6	25.3	-1.6	-16.7	-18.0	-16.6	-34.6	0.0

SOAP KEEPS SHOWING HIGH GROWTH

De-stocking visible in several categories

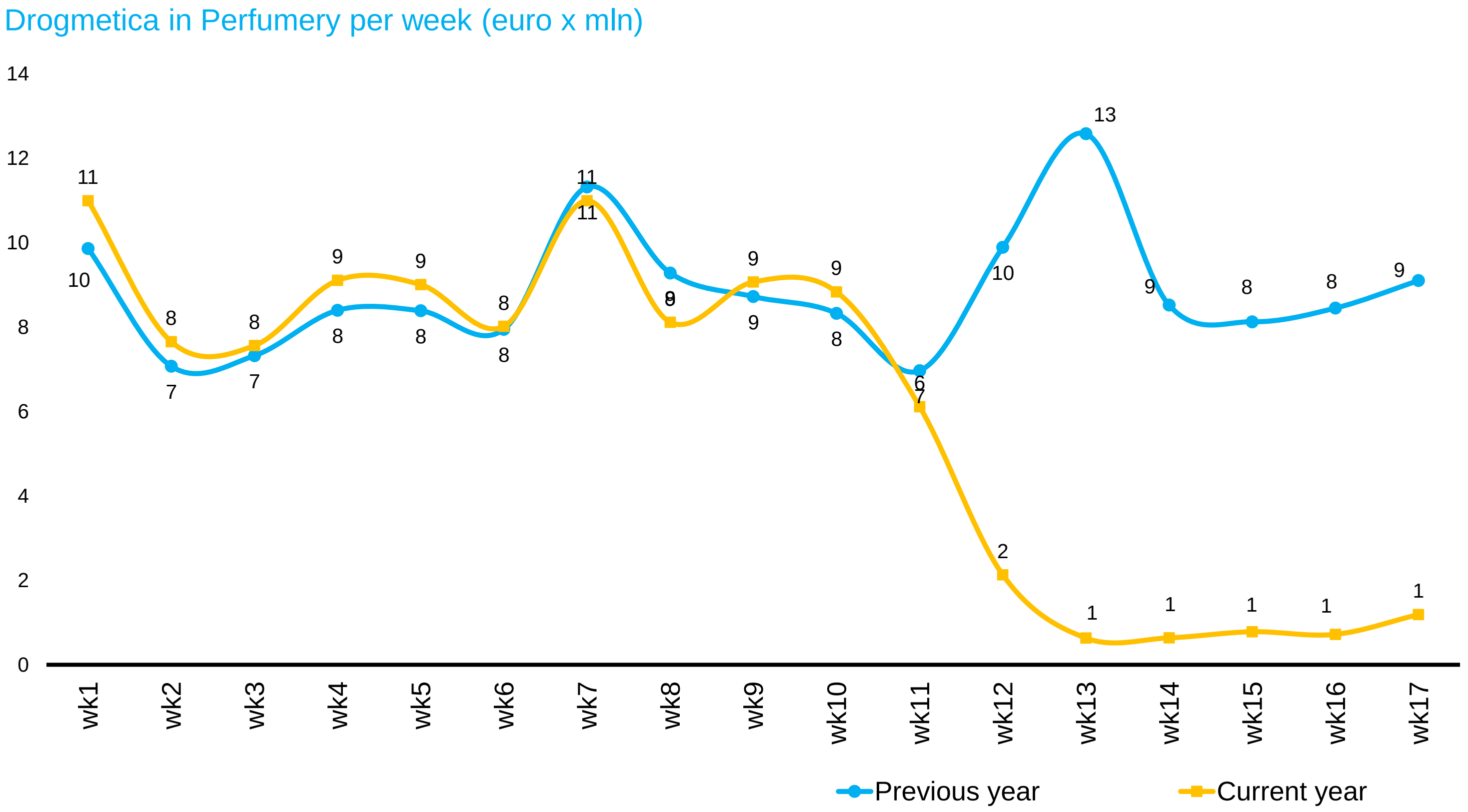
Drug

				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
Vit/Mineralen Suppl.	99	139	11,381	99	139	129	132	206	215	125	109	101	97	114
Toiletzeep	123	306	6,432	123	306	462	382	481	375	218	232	178	192	216
Otc Hoest Verkoudheid En Griep	94	125	5,799	94	125	105	129	244	227	122	83	92	67	89
Pijnstillers	107	140	5,635	107	140	134	147	318	253	103	84	74	70	84
Hand/Bodyproducten	93	131	4,884	93	131	109	123	132	128	175	150	118	105	142
Haarkleurmiddelen	106	142	3,859	106	142	107	113	122	137	183	165	129	147	176
Vochtige Doekjes	99	139	1,651	99	139	155	152	227	187	95	129	91	103	143
Celstofbabyluiers	89	98	1,203	89	98	125	100	154	114	73	70	81	75	84
Schuimbadproducten	101	108	985	101	108	124	118	130	114	101	95	76	94	123
Gelaatsproducten	106	106	975	106	106	109	117	94	102	113	110	89	95	129
Huishoudreinigers	99	176	883	99	176	156	155	311	427	159	135	132	89	93
Diagnostica	101	400	807	101	400	236	397	836	656	151	177	489	359	294
Toiletpapier	85	114	736	85	114	136	130	358	106	113	83	74	74	46
Wasmiddelen	111	126	717	111	126	161	97	157	144	115	126	102	111	116
Papieren Zakdoekjes	103	167	628	103	167	200	207	380	305	109	77	61	96	100
Schoonmaakhulpmiddelen	74	181	540	74	181	143	162	193	208	125	179	286	220	166
Tissues Droog	102	164	524	102	164	149	145	266	245	163	137	104	120	142
Tandpasta	100	105	495	100	105	108	104	154	150	98	78	87	84	95
Scheermesjes	102	107	430	102	107	121	118	105	91	110	114	96	90	126
Machinevaatwasmiddel	107	129	284	107	129	170	347	169	181	191	80	133	182	41

PERFUMERY CHANNEL

PERFUMERY SALES REMAIN VERY LOW

Closure of many stores main driver



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.**