# COVID-19 CRISIS

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

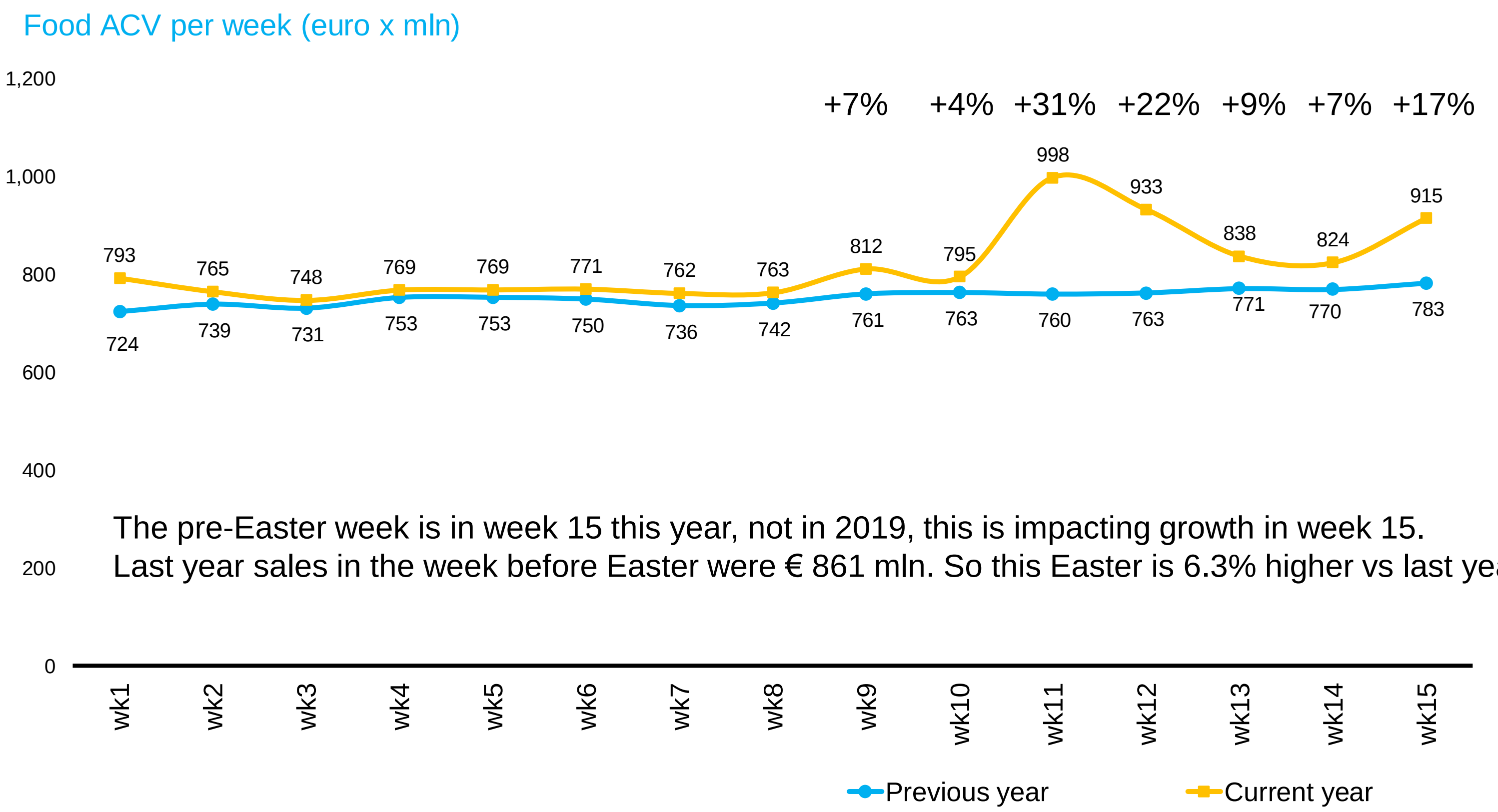
Update: April 15, 2020


# Weekly update

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

# SUPERMARKETS

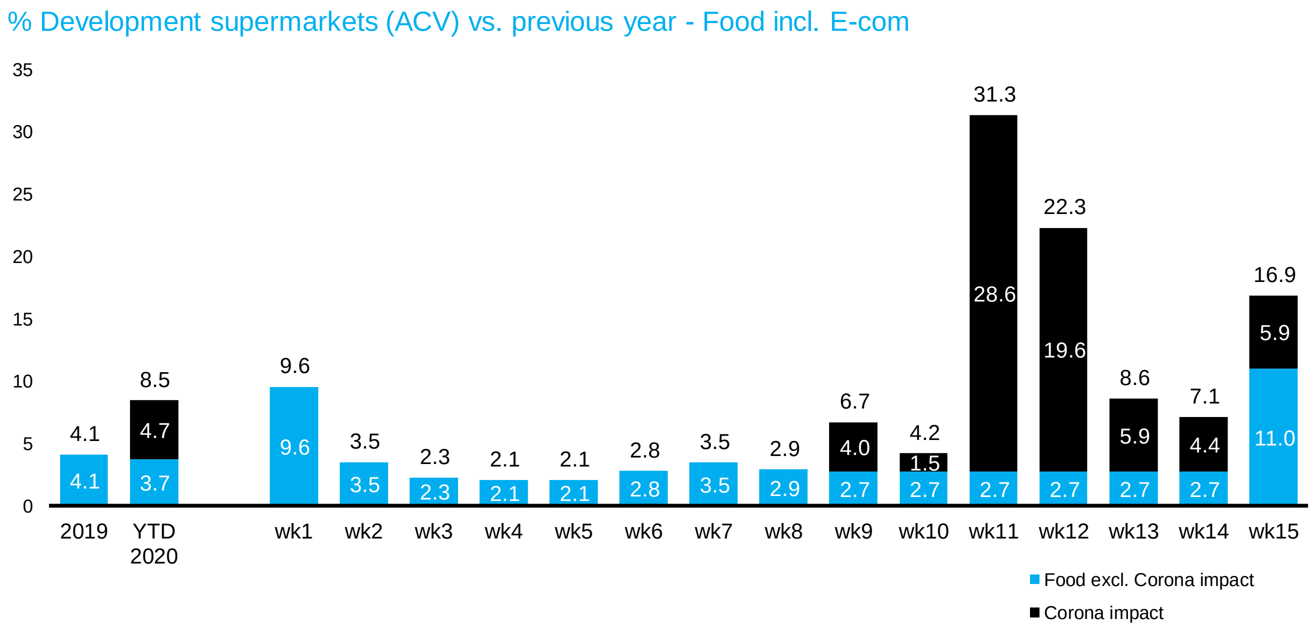
# LESS STOCKPILING, BUT SALES REMAIN HIGH




The pre-Easter week is in week 15 this year, not in 2019, this is impacting growth in week 15.
Last year sales in the week before Easter were € 861 mln. So this Easter is 6.3% higher vs last year.

# € 533M+ SALES DUE TO COVID-19

## Covid-19 impact up again, driven by more people staying home with Easter




| Extra growth from wk9 | Extra % growth from wk 9 | Impact on % YTD growth |
|---|---|---|
| **€ 533M** | **9.6%** | **4.7%** |

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 11% in week 15, is the average uplift of Easter in previous years

# LOWER GROWTH IN MOST SUPERGROUPS

Still double digit in KW, diepvries, schoonmaak and body 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 |
|---|---|---|---|---|---|---|---|---|---|
| Totaal Supermarkten (ACV) | 7.8 | 2.7 | 13.4 | 6.7 | 4.2 | 31.3 | 22.3 | 8.6 | 7.1 |
| Dranken Houdbaar | 5.3 | 1.2 | 8.2 | 0.4 | -0.7 | 22.6 | 14.5 | 5.5 | 7.8 |
| Kruidenierswaren | 15.4 | 3.2 | 30.9 | 20.7 | 9.0 | 68.2 | 52.9 | 21.0 | 12.9 |
| Zoetwaren & Snacks | 6.7 | 4.0 | 9.2 | 6.8 | 5.5 | 20.7 | 11.1 | 4.6 | 6.2 |
| Diepvries | 11.2 | 4.3 | 18.6 | 6.0 | 0.1 | 39.9 | 34.3 | 15.7 | 15.6 |
| Vers | 6.3 | 2.4 | 10.4 | 4.8 | 3.4 | 21.5 | 15.7 | 9.3 | 7.9 |
| Schoonmaak & Onderhoud | 12.4 | 2.4 | 27.6 | 25.9 | 1.6 | 43.6 | 54.9 | 31.3 | 11.0 |
| Drogmetica | 19.0 | 2.8 | 40.5 | 26.1 | 25.3 | 73.6 | 81.6 | 34.9 | 2.0 |
| Haarverzorging | 7.0 | 0.8 | 11.9 | 0.1 | -10.7 | 30.9 | 39.4 | 11.8 | 2.2 |
| Health Care | 28.2 | 6.5 | 59.2 | 31.3 | 33.4 | 126.8 | 122.7 | 33.0 | 7.5 |
| Lichaamsverzorging | 22.3 | 3.9 | 47.6 | 29.3 | 40.1 | 40.6 | 83.1 | 63.2 | 32.3 |
| Mondverzorging | 16.2 | 11.5 | 23.3 | 41.8 | 77.0 | -6.0 | 47.4 | 17.4 | -13.6 |
| Papier | 18.2 | 0.5 | 42.0 | 25.9 | 16.3 | 102.2 | 84.3 | 33.2 | -5.5 |
| Rookwaren | 4.0 | 2.5 | 5.2 | -2.0 | 2.6 | 15.6 | 11.1 | 1.4 | 3.1 |

# TOILET PAPER TURNS INTO A DECLINE

## Growth in meat, fruit, vegetables and coffee remains high

### Overview CPG categories

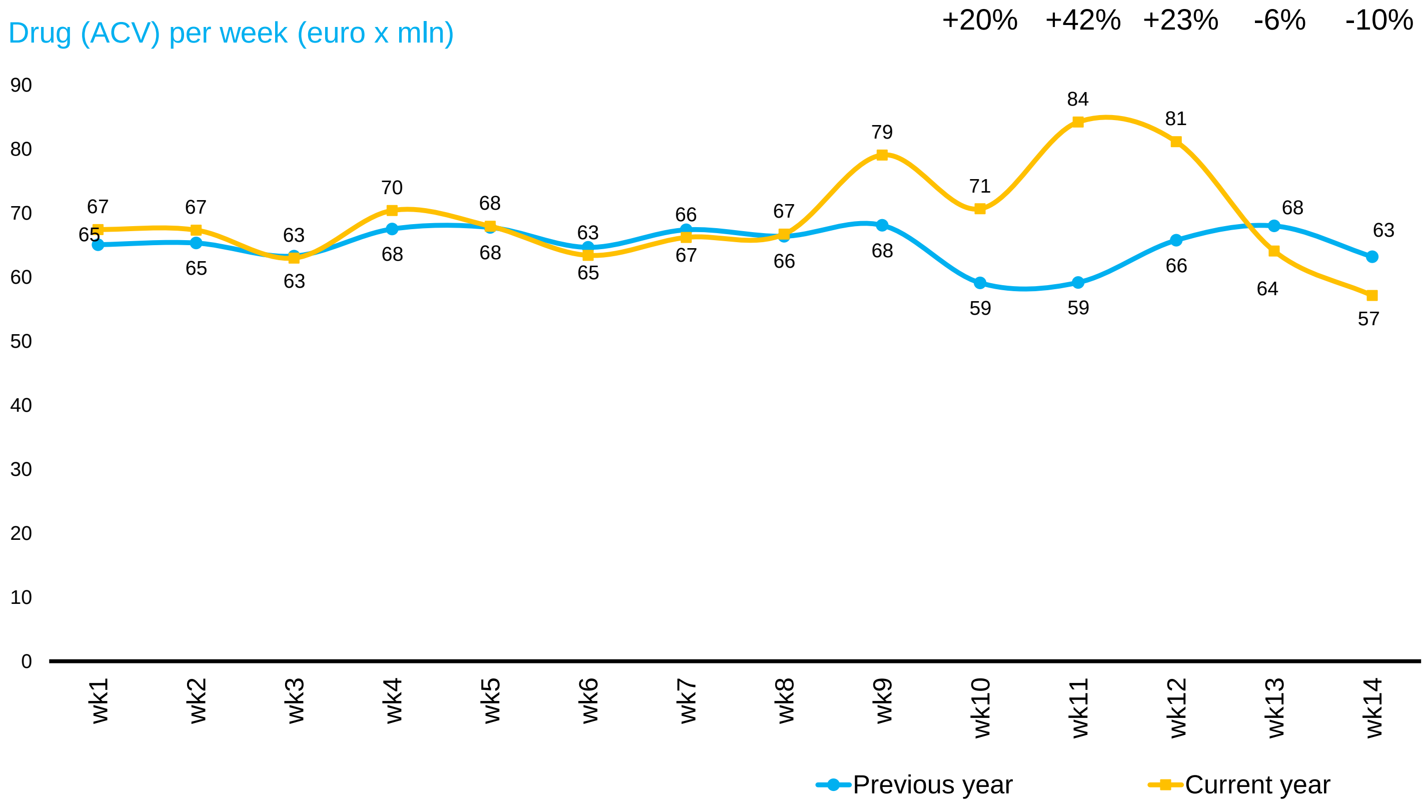
| Category | Value index wk2-8 2020/2019 | Value index from wk9 2020/2019 | Est. Impact in € (000) Actual minus expected | Index € sales vs PY wk2-8 20 | YTD from wk 9 20 | w9 | w10 | w11 | w12 | w13 | w14 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Vlees | 100 | 118 | 46,038 | 100 | 118 | 107 | 103 | 131 | 132 | 118 | 116 |
| Fruit | 104 | 118 | 33,678 | 104 | 118 | 107 | 106 | 122 | 122 | 126 | 122 |
| Groenten | 99 | 109 | 19,550 | 99 | 109 | 102 | 99 | 117 | 111 | 115 | 111 |
| Toiletpapier | 104 | 151 | 18,016 | 104 | 151 | 131 | 134 | 227 | 183 | 141 | 92 |
| Bonenkoffie | 104 | 122 | 14,961 | 104 | 122 | 99 | 101 | 142 | 139 | 136 | 120 |
| Groentenconserven | 104 | 163 | 14,684 | 104 | 163 | 154 | 112 | 252 | 219 | 135 | 111 |
| Kaas | 102 | 110 | 14,136 | 102 | 110 | 106 | 101 | 124 | 114 | 107 | 107 |
| Zuivel | 102 | 108 | 11,211 | 102 | 108 | 104 | 103 | 117 | 110 | 106 | 108 |
| Broodbeleg | 102 | 120 | 9,162 | 102 | 120 | 116 | 109 | 151 | 128 | 111 | 106 |
| Geelvet | 102 | 118 | 9,091 | 102 | 118 | 107 | 101 | 138 | 140 | 121 | 103 |
| Vleeswaren | 103 | 109 | 8,925 | 103 | 109 | 107 | 104 | 120 | 112 | 107 | 104 |
| Brood Afbak | 106 | 145 | 8,883 | 106 | 145 | 104 | 106 | 195 | 165 | 146 | 159 |
| Maaltijdversierders | 102 | 138 | 8,524 | 102 | 138 | 118 | 107 | 198 | 179 | 125 | 104 |
| Eetdeegwaren | 103 | 143 | 8,254 | 103 | 143 | 120 | 115 | 229 | 179 | 116 | 102 |
| Huishoudreinigers | 111 | 167 | 8,153 | 111 | 167 | 139 | 131 | 222 | 185 | 183 | 146 |
| Droge Snacks | 108 | 119 | 7,676 | 108 | 119 | 113 | 109 | 130 | 129 | 117 | 117 |
| Bakproducten | 102 | 190 | 7,646 | 102 | 190 | 144 | 114 | 204 | 252 | 230 | 200 |
| Vleesconserven | 112 | 173 | 7,571 | 112 | 173 | 138 | 138 | 249 | 223 | 153 | 131 |
| Natte Soepen | 102 | 154 | 7,552 | 102 | 154 | 160 | 120 | 186 | 202 | 150 | 97 |
| Toiletzeep | 104 | 391 | 7,412 | 104 | 391 | 340 | 335 | 475 | 533 | 357 | 288 |

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 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

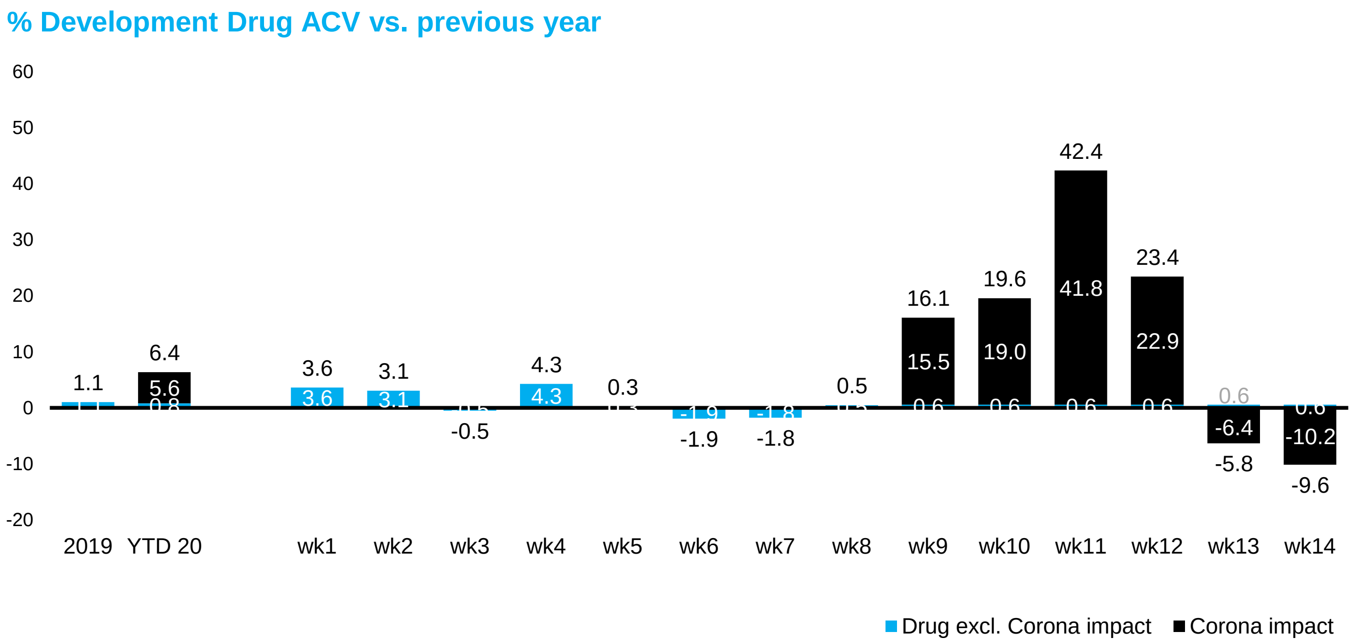
# DRUG CHANNEL

# DRUG IN DECLINE FOR 2 WEEKS IN A ROW

Less traffic and de-stockpiling are likely to be the drivers of this



# STILL, € 51M+ SALES IN DRUG DUE TO COVID-19




| Extra growth from wk9 | Extra % growth from wk 9 | Impact on % YTD growth |
|---|---|---|
| **€ 51M** | **13.2%** | **5.6%** |

# MOST SUPERGROUPS IN DECLINE IN DRUG

## Highest euro impact for cosmetics and healthcare

% 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 |
|---|---|---|---|---|---|---|---|---|---|
| Drogmetica | 8.0 | 1.6 | 16.3 | 16.6 | 21.0 | 47.6 | 29.1 | -3.1 | -11.0 |
| Deco.Cosmetica | -10.6 | -1.6 | -22.2 | -1.7 | 4.0 | -16.6 | -38.5 | -37.2 | -40.8 |
| Geuren | -13.3 | -1.6 | -28.6 | -10.6 | -1.6 | -15.8 | -38.5 | -53.5 | -43.2 |
| Haarverzorging | 8.7 | 6.9 | 11.1 | 14.5 | 17.6 | 21.5 | 12.3 | 5.8 | -2.9 |
| Health Care | 15.0 | 0.2 | 35.7 | 17.7 | 26.3 | 96.3 | 83.0 | 6.6 | -10.8 |
| Lichaamsverzorging | 9.5 | 3.2 | 17.2 | 21.5 | 26.8 | 26.3 | 11.2 | 11.3 | 7.9 |
| Mondverzorging | 6.8 | 4.1 | 10.3 | 24.3 | 18.2 | 35.8 | 20.5 | -14.2 | -20.6 |
| Papier | 8.2 | -2.0 | 22.2 | 28.2 | 20.9 | 80.0 | 39.0 | -15.5 | -17.1 |
| Schoonmaak & Onderhoud | 19.5 | 11.9 | 32.3 | 41.7 | 22.4 | 65.7 | 50.0 | 8.7 | 7.0 |
| Dranken Houdbaar | 10.9 | 6.2 | 13.7 | 36.3 | 48.6 | 29.9 | 2.0 | -20.2 | 1.3 |
| Kruidenierswaren | 4.4 | 0.3 | 10.8 | 19.8 | 5.9 | 63.5 | 26.7 | -22.8 | -33.1 |
| Zoetwaren & Snacks | 3.3 | 4.0 | 2.2 | 13.7 | 14.6 | 25.3 | -1.6 | -17.3 | -18.7 |

# PAINKILLERS/OTC MEDICINE TURN NEGATIVE

Still high growth in toilet soap and hand/body products

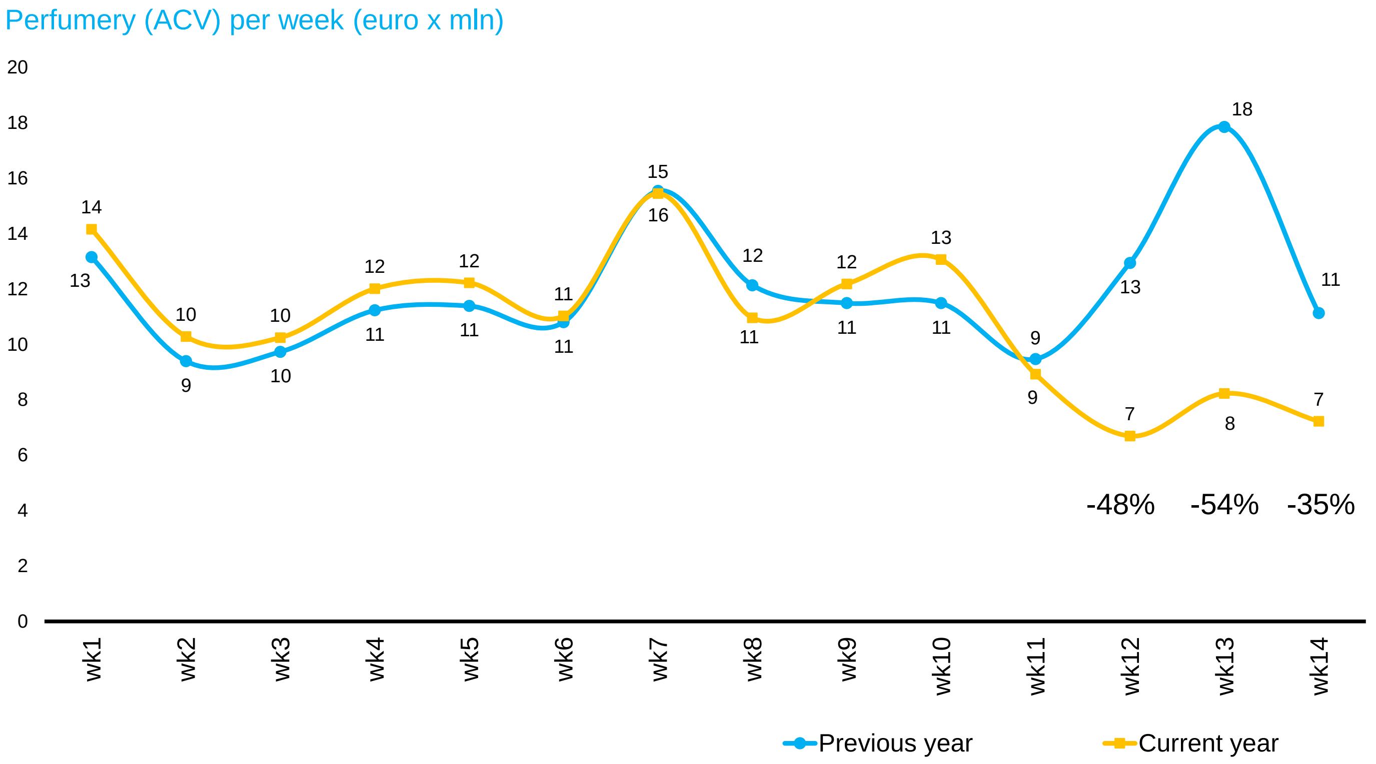
## Drug

| 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 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Vit/Mineralen Suppl. | 99 | 154 | 11,089 | 99 | 154 | 129 | 132 | 206 | 215 | 125 | 109 |
| Pijnstillers | 107 | 171 | 7,392 | 107 | 171 | 134 | 147 | 318 | 253 | 103 | 84 |
| Otc Hoest Verkoudheid En Griep | 94 | 148 | 7,211 | 94 | 148 | 105 | 129 | 244 | 227 | 122 | 83 |
| Toiletzeep | 123 | 359 | 5,536 | 123 | 359 | 462 | 382 | 481 | 375 | 217 | 230 |
| Hand/Bodyproducten | 92 | 135 | 3,594 | 92 | 135 | 108 | 122 | 131 | 127 | 173 | 148 |
| Haarkleurmiddelen | 106 | 139 | 2,356 | 106 | 139 | 107 | 113 | 122 | 137 | 182 | 164 |
| Celstofbabyluiers | 89 | 107 | 1,578 | 89 | 107 | 125 | 100 | 154 | 114 | 72 | 69 |
| Vochtige Doekjes | 99 | 151 | 1,431 | 99 | 151 | 154 | 151 | 226 | 186 | 94 | 128 |
| Schuimbadproducten | 101 | 113 | 1,223 | 101 | 113 | 124 | 118 | 130 | 114 | 100 | 94 |
| Tandpasta | 100 | 114 | 1,125 | 100 | 114 | 108 | 104 | 154 | 150 | 98 | 78 |
| Toiletpapier | 85 | 142 | 994 | 85 | 142 | 136 | 130 | 358 | 106 | 112 | 83 |
| Huishoudreinigers | 99 | 216 | 865 | 99 | 216 | 156 | 155 | 311 | 426 | 158 | 134 |
| Wasmiddelen | 111 | 133 | 844 | 111 | 133 | 161 | 97 | 157 | 144 | 115 | 125 |
| Gelaatsproducten | 107 | 108 | 839 | 107 | 108 | 109 | 118 | 95 | 103 | 113 | 110 |
| Papieren Zakdoekjes | 103 | 208 | 692 | 103 | 208 | 200 | 207 | 380 | 305 | 108 | 77 |
| Diagnostica | 101 | 406 | 581 | 101 | 406 | 236 | 397 | 836 | 656 | 151 | 177 |
| Wond- En Sportverzorging | 115 | 129 | 534 | 115 | 129 | 150 | 155 | 176 | 125 | 94 | 84 |
| Dameshygiene | 107 | 113 | 511 | 107 | 113 | 119 | 124 | 147 | 147 | 77 | 74 |
| Machinevaatwasmiddel | 107 | 171 | 505 | 107 | 171 | 170 | 347 | 169 | 181 | 189 | 79 |
| Tissues Droog | 102 | 185 | 465 | 102 | 185 | 149 | 145 | 266 | 245 | 162 | 136 |

# 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.**

This artwork was created using Nielsen data.