# COVID-19 CRISIS

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

Update: August 20th, 2020

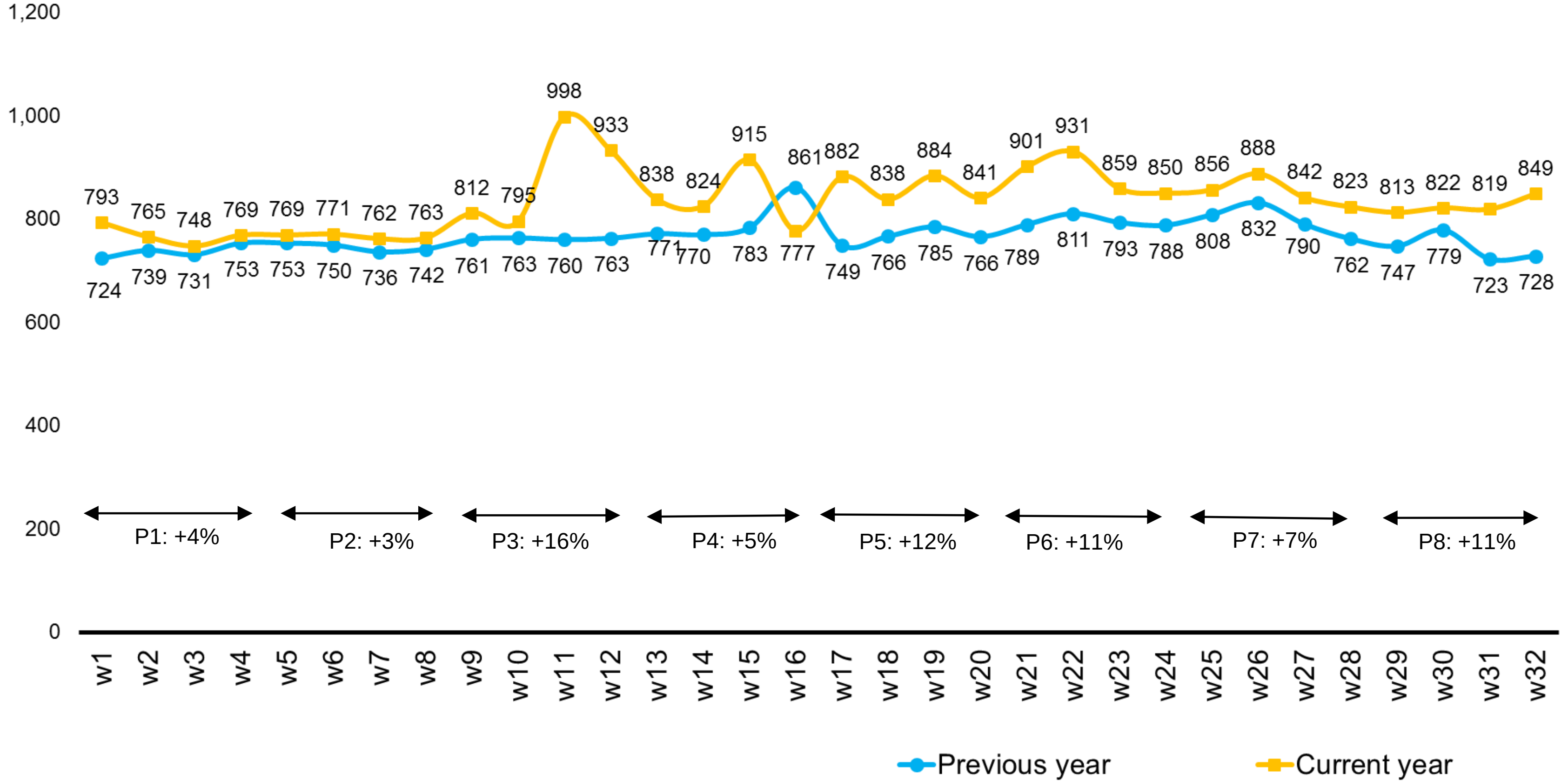

# Weekly update

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

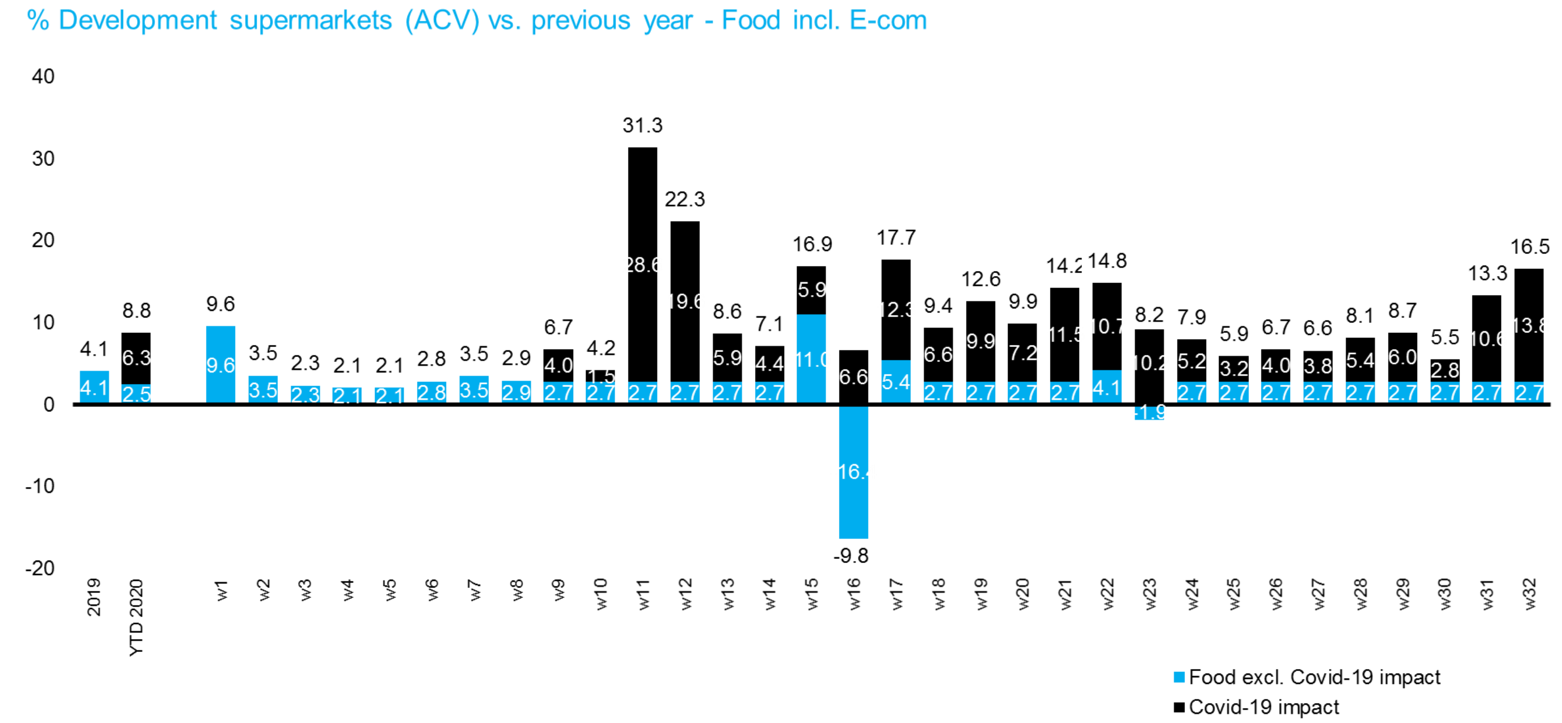
# SUPERMARKETS

# FOOD SALES PER WEEK

Food ACV per week (euro x mln)



# IMPACT OF COVID-19 ON SALES




| Extra growth from wk9 | Extra % growth from wk 9 | Impact on % YTD growth |
|---|---|---|
| **€ 1538M** | **8.1%** | **6.3%** |

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 + 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 | P3 20 | P4 20 | P5 20 | P6 20 | P7 20 | wk 29 20 | wk 30 20 | wk 31 20 | wk 32 20 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Totaal Supermarkten (ACV) | 8.8 | -28.8 | 10.4 | 16.1 | 5.3 | 12.4 | 11.3 | 6.8 | 8.7 | 5.5 | 13.3 | 16.5 |
| Dranken Houdbaar | 9.2 | 1.3 | 11.0 | 9.5 | 4.9 | 16.7 | 17.9 | 5.7 | 9.9 | -5.0 | 15.9 | 29.4 |
| Kruidenierswaren | 12.7 | 3.2 | 15.7 | 39.0 | 10.2 | 12.8 | 11.4 | 9.6 | 8.1 | 14.4 | 11.3 | 6.7 |
| Zoetwaren & Snacks | 6.4 | 4.1 | 6.9 | 12.0 | -1.1 | 5.6 | 7.0 | 7.5 | 8.2 | 19.9 | 11.5 | 5.6 |
| Diepvries | 13.3 | 4.4 | 15.6 | 22.5 | 15.7 | 23.8 | 18.9 | 4.2 | 9.7 | -14.2 | 18.2 | 37.4 |
| Vers | 8.0 | 2.7 | 9.5 | 12.9 | 6.4 | 11.8 | 10.7 | 6.1 | 8.0 | 6.1 | 11.0 | 12.2 |
| Schoonmaak & Onderhoud | 9.5 | 2.4 | 12.2 | 31.9 | 13.7 | 9.2 | 10.2 | 2.9 | 5.5 | 12.5 | 4.3 | 1.6 |
| Drogmetica | 10.5 | 2.9 | 12.9 | 54.6 | 10.0 | 4.7 | 3.2 | -0.9 | 1.3 | 4.0 | 10.4 | 13.5 |
| Haarverzorging | 0.4 | 0.8 | -0.6 | 14.4 | 6.6 | -2.6 | -10.3 | -6.1 | -19.4 | -11.8 | -0.4 | 14.9 |
| Health Care | 11.0 | 6.7 | 12.6 | 78.6 | 8.9 | -10.7 | -5.9 | -6.3 | -1.7 | 2.8 | 7.3 | 14.9 |
| Lichaamsverzorging | 19.8 | 3.9 | 24.6 | 49.4 | 40.5 | 36.1 | 14.7 | 1.4 | 9.7 | -5.6 | 25.9 | 44.6 |
| Mondverzorging | 9.4 | 11.5 | 9.1 | 33.9 | -6.3 | 8.8 | 2.7 | 8.6 | 8.0 | 14.3 | 3.2 | -0.2 |
| Papier | 9.0 | 0.6 | 11.7 | 61.1 | 4.2 | -1.9 | 2.7 | -1.6 | 1.2 | 9.4 | 8.8 | 5.9 |
| Rookwaren | 8.2 | 2.7 | 9.7 | 6.9 | 2.8 | 9.7 | 14.4 | 10.1 | 10.9 | 5.3 | 16.0 | 23.1 |

# SALES INDEX ON CATEGORY LEVEL

## Ranked on estimated impact of Covid-19

### Overview categories

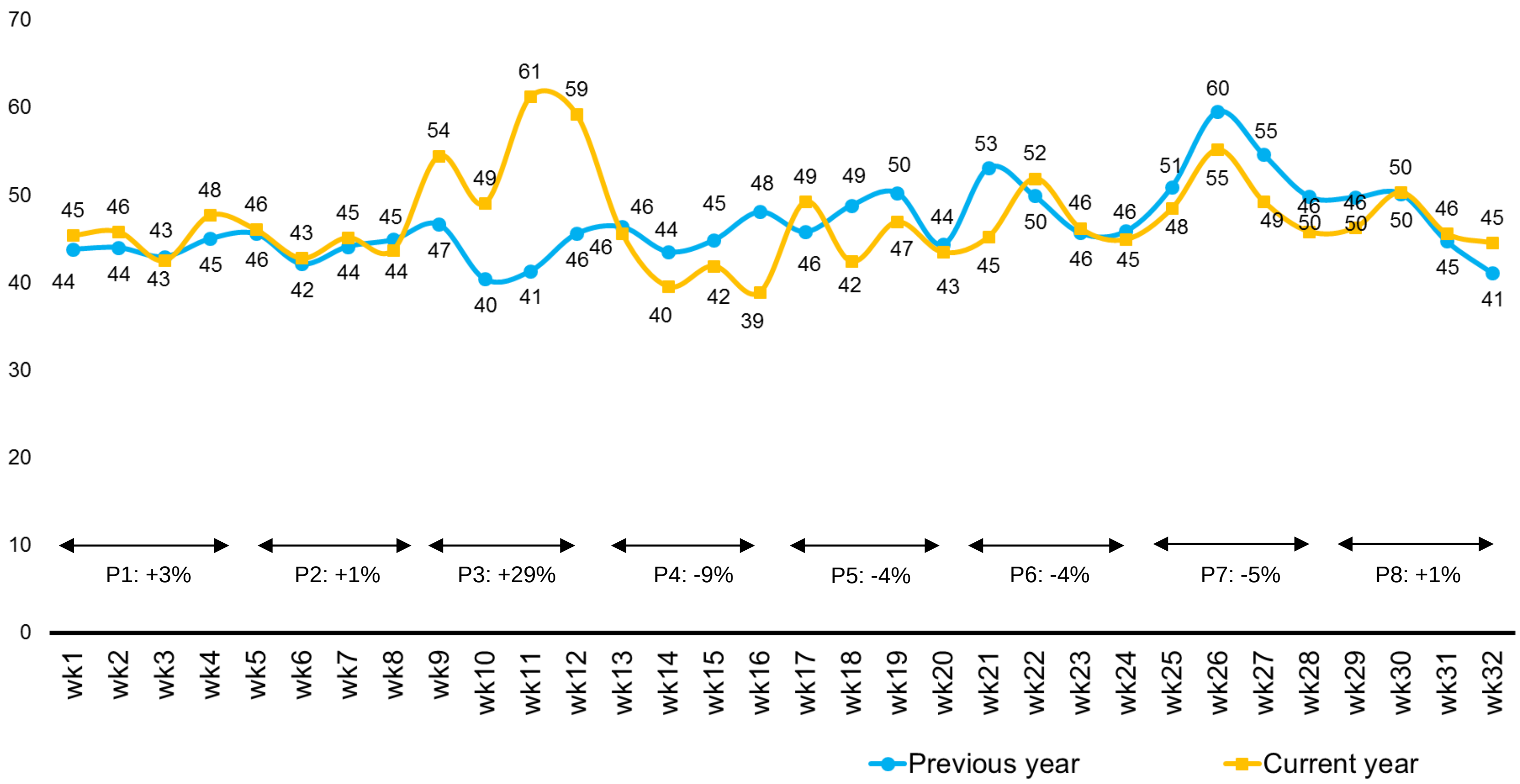
| | | | | | Index € sales vs PY | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Category | Value index wk2-8 2020/2019 | Value index from wk9 2020/2019 | Difference in index pts | Est. Impact in € (000) Actual minus expected | wk2-8 20 | YTD from wk 9 20 | P3 20 | P4 20 | P5 20 | P6 20 | P7 20 | w29 | w30 | w31 | w32 |
| Vlees | 100 | 115 | 14 | 153,825 | 100 | 115 | 120 | 113 | 118 | 116 | 107 | 112 | 111 | 117 | 119 |
| Fruit | 105 | 116 | 12 | 135,579 | 105 | 116 | 116 | 124 | 119 | 117 | 109 | 115 | 99 | 117 | 129 |
| Groenten | 99 | 112 | 12 | 103,829 | 99 | 112 | 110 | 112 | 118 | 113 | 108 | 107 | 106 | 110 | 110 |
| Bier | 102 | 112 | 10 | 77,618 | 102 | 112 | 101 | 104 | 124 | 126 | 103 | 111 | 86 | 120 | 148 |
| Stille Wijnen | 96 | 112 | 16 | 67,356 | 96 | 112 | 101 | 106 | 120 | 119 | 109 | 109 | 116 | 118 | 112 |
| Koffie excl. oplos | 104 | 120 | 16 | 51,294 | 104 | 120 | 121 | 117 | 123 | 128 | 121 | 111 | 124 | 110 | 102 |
| Zuivel | 102 | 108 | 6 | 44,878 | 102 | 108 | 109 | 106 | 110 | 109 | 108 | 107 | 108 | 108 | 107 |
| Kaas | 103 | 109 | 6 | 42,758 | 103 | 109 | 113 | 104 | 111 | 110 | 108 | 107 | 110 | 108 | 106 |
| Shag | 100 | 113 | 13 | 37,107 | 100 | 113 | 107 | 103 | 112 | 120 | 116 | 114 | 111 | 118 | 123 |
| Sigaretten | 104 | 108 | 5 | 31,001 | 104 | 108 | 106 | 102 | 109 | 112 | 108 | 110 | 103 | 116 | 124 |
| Vleeswaren | 104 | 108 | 5 | 28,390 | 104 | 108 | 112 | 103 | 110 | 108 | 109 | 108 | 113 | 108 | 101 |
| Dv Ijs | 107 | 115 | 8 | 23,405 | 107 | 115 | 106 | 127 | 155 | 127 | 90 | 102 | 54 | 125 | 204 |
| Pindas Noten+Aanv | 103 | 115 | 12 | 22,746 | 103 | 115 | 111 | 110 | 123 | 117 | 114 | 114 | 114 | 116 | 110 |
| Brood Afbak | 105 | 128 | 23 | 22,690 | 105 | 128 | 143 | 118 | 127 | 132 | 124 | 121 | 121 | 137 | 134 |
| Toiletzeep | 104 | 298 | 194 | 21,679 | 104 | 298 | 432 | 321 | 321 | 287 | 237 | 180 | 286 | 196 | 190 |
| Dv Snacks | 105 | 123 | 18 | 21,443 | 105 | 123 | 125 | 125 | 126 | 119 | 121 | 113 | 131 | 121 | 121 |
| Sauzen | 103 | 116 | 13 | 20,108 | 103 | 116 | 118 | 114 | 124 | 121 | 106 | 108 | 104 | 118 | 129 |
| Smaakmakers | 104 | 129 | 25 | 19,493 | 104 | 129 | 127 | 131 | 141 | 131 | 123 | 117 | 134 | 122 | 110 |
| Groentenconserven | 104 | 124 | 20 | 18,227 | 104 | 124 | 184 | 110 | 103 | 113 | 112 | 119 | 123 | 117 | 107 |
| Geelvet | 102 | 111 | 9 | 17,969 | 102 | 111 | 123 | 106 | 115 | 111 | 104 | 105 | 121 | 110 | 98 |

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 | P3 20 | P4 20 | P5 20 | P6 20 | P7 20 | wk 29 20 | wk 30 20 | wk 31 20 | wk 32 20 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Drogmetica | 0.8 | 1.6 | 0.4 | 28.8 | -9.2 | -3.8 | -3.2 | -7.5 | -6.9 | 0.3 | 2.0 | 8.5 |
| Deco.Cosmetica | -12.7 | -1.0 | -16.6 | -12.4 | -35.4 | -17.6 | -18.6 | -10.0 | -9.4 | 15.2 | -8.5 | -14.2 |
| Geuren | -11.7 | -1.2 | -14.6 | -16.1 | -43.4 | -10.0 | -27.2 | 15.2 | -15.6 | 13.3 | -11.5 | -2.9 |
| Haarverzorging | 3.6 | 6.9 | 2.7 | 16.5 | -1.4 | 6.0 | 2.6 | -5.1 | -6.5 | 10.7 | -2.3 | -6.8 |
| Health Care | 3.2 | 0.2 | 4.2 | 55.6 | -6.9 | -8.9 | -3.7 | -8.5 | -4.6 | 1.8 | -0.4 | 2.5 |
| Lichaamsverzorging | 3.1 | 3.1 | 3.1 | 21.4 | 2.8 | 4.3 | 5.1 | -12.3 | -8.8 | -11.0 | 12.0 | 40.6 |
| Mondverzorging | 1.9 | 4.2 | 1.0 | 24.9 | -18.1 | -3.0 | -3.1 | 5.3 | -1.0 | 8.1 | 3.6 | -6.7 |
| Papier | -0.2 | -1.9 | 0.4 | 42.5 | -14.3 | -9.2 | -5.8 | -7.0 | -8.3 | 3.2 | -0.7 | -3.2 |
| Schoonmaak & Onderhoud | 11.3 | 12.0 | 11.5 | 44.5 | 11.3 | 0.6 | 9.7 | 11.6 | -16.3 | 8.1 | 4.2 | -8.0 |
| Dranken Houdbaar | 4.9 | 6.2 | 3.8 | 28.4 | -8.7 | -6.3 | 17.7 | -5.9 | -11.4 | -5.7 | 21.7 | 22.5 |
| Kruidenierswaren | -4.3 | 0.3 | -5.7 | 33.2 | -25.5 | -18.9 | -11.7 | -7.7 | -14.1 | 1.1 | -4.8 | 1.3 |
| Zoetwaren & Snacks | 1.0 | 4.2 | -0.2 | 13.0 | -19.9 | -7.8 | -0.8 | 11.5 | 4.7 | 25.7 | 2.1 | -9.2 |

# SALES INDEX ON CATEGORY LEVEL - DRUG

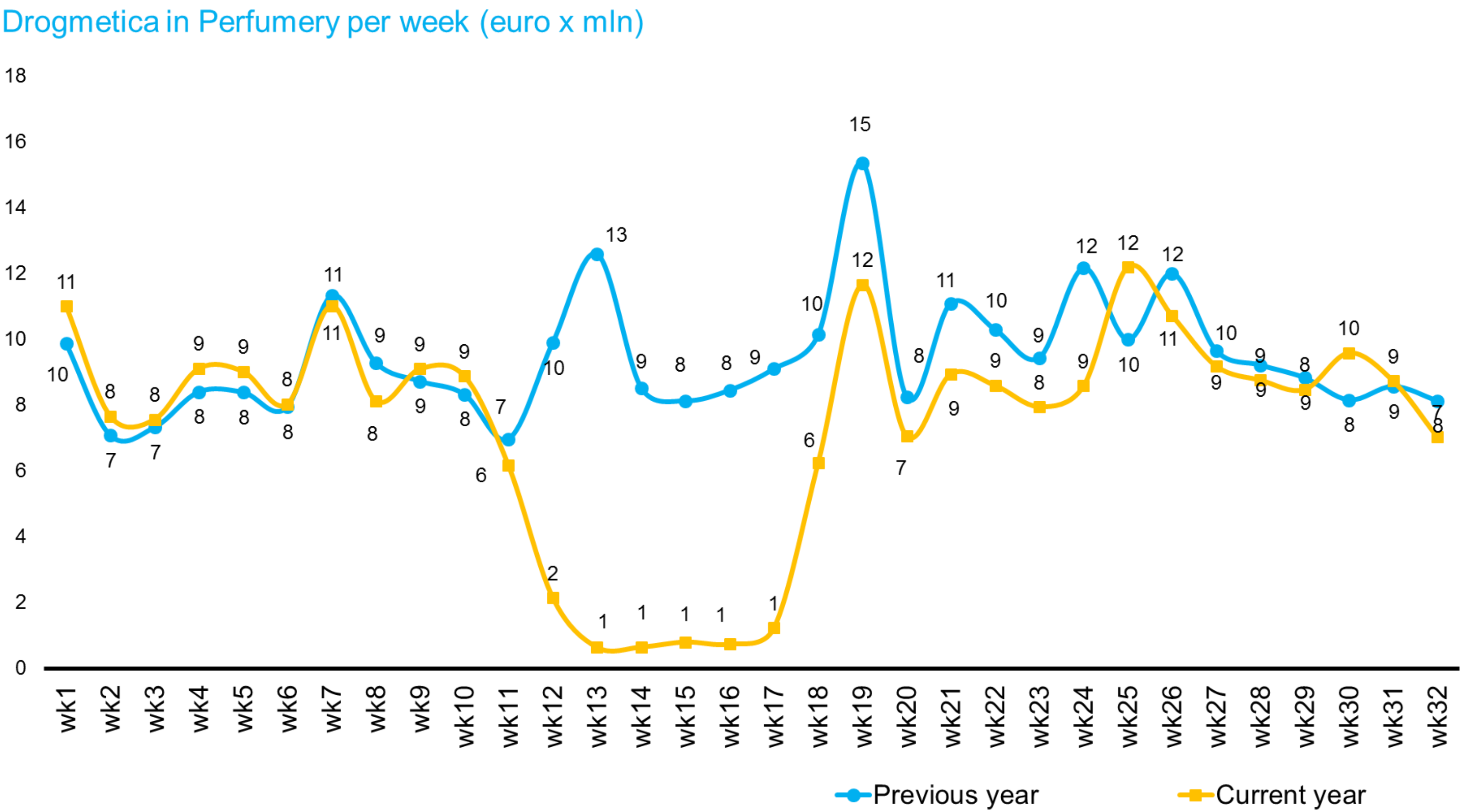
## Drug

| 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 | P3 | P4 | P5 | P6 | P7 | w29 | w30 | w31 | w32 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Vit/Mineralen Suppl. | 100 | 121 | 15,346 | 100 | 121 | 172 | 111 | 102 | 106 | 111 | 124 | 132 | 119 | 98 |
| Toiletzeep | 123 | 275 | 14,985 | 123 | 275 | 428 | 236 | 282 | 250 | 209 | 226 | 340 | 265 | 196 |
| Hand/Bodyproducten | 92 | 113 | 6,893 | 92 | 113 | 122 | 136 | 110 | 114 | 94 | 97 | 109 | 103 | 113 |
| Haarkleurmiddelen | 106 | 123 | 5,235 | 106 | 123 | 121 | 156 | 141 | 110 | 102 | 98 | 130 | 105 | 93 |
| Otc Hoest Verkoudheid En Griep | 94 | 107 | 4,003 | 94 | 107 | 169 | 90 | 83 | 99 | 89 | 92 | 111 | 104 | 106 |
| Vochtige Doekjes | 99 | 113 | 1,915 | 99 | 113 | 180 | 104 | 110 | 108 | 94 | 98 | 108 | 93 | 105 |
| Diagnostica | 102 | 295 | 1,610 | 102 | 295 | 625 | 245 | 204 | 197 | 239 | 175 | 256 | 187 | 172 |
| Celstofbabyluiers | 89 | 92 | 1,272 | 89 | 92 | 124 | 77 | 81 | 89 | 90 | 87 | 89 | 95 | 102 |
| Huishoudreinigers | 99 | 133 | 1,074 | 99 | 133 | 253 | 129 | 97 | 104 | 98 | 114 | 153 | 140 | 123 |
| Schoonmaakhulpmiddelen | 74 | 133 | 722 | 74 | 133 | 175 | 190 | 130 | 121 | 113 | 58 | 90 | 102 | 97 |
| Tissues Droog | 102 | 134 | 687 | 102 | 134 | 201 | 130 | 125 | 116 | 116 | 89 | 116 | 107 | 102 |
| Papieren Zakdoekjes | 103 | 126 | 504 | 103 | 126 | 275 | 88 | 94 | 100 | 90 | 86 | 92 | 84 | 85 |
| Toiletpapier | 85 | 94 | 444 | 85 | 94 | 158 | 86 | 69 | 86 | 79 | 68 | 91 | 97 | 69 |
| Vaatwasmiddelen | 101 | 123 | 368 | 101 | 123 | 155 | 82 | 117 | 158 | 153 | 123 | 32 | 65 | 215 |
| Pijnstillers | 107 | 107 | -89 | 107 | 107 | 211 | 83 | 80 | 84 | 90 | 86 | 106 | 95 | 94 |
| Machinevaatwasmiddel | 107 | 123 | 611 | 107 | 123 | 205 | 137 | 74 | 127 | 173 | 91 | 118 | 102 | 106 |
| Opzettandenborstels | 114 | 114 | 428 | 114 | 114 | 140 | 77 | 94 | 123 | 137 | 118 | 135 | 111 | 113 |
| Toiletreinigers | 69 | 145 | 240 | 69 | 145 | 70 | 224 | 165 | 373 | 72 | 101 | 80 | 58 | 67 |
| Keukenpapier | 120 | 126 | 210 | 120 | 126 | 168 | 116 | 106 | 146 | 98 | 122 | 229 | 110 | 66 |
| Anti Kalk | 74 | 143 | 170 | 74 | 143 | 84 | 94 | 133 | 192 | 201 | 173 | 240 | 193 | 153 |

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




# 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

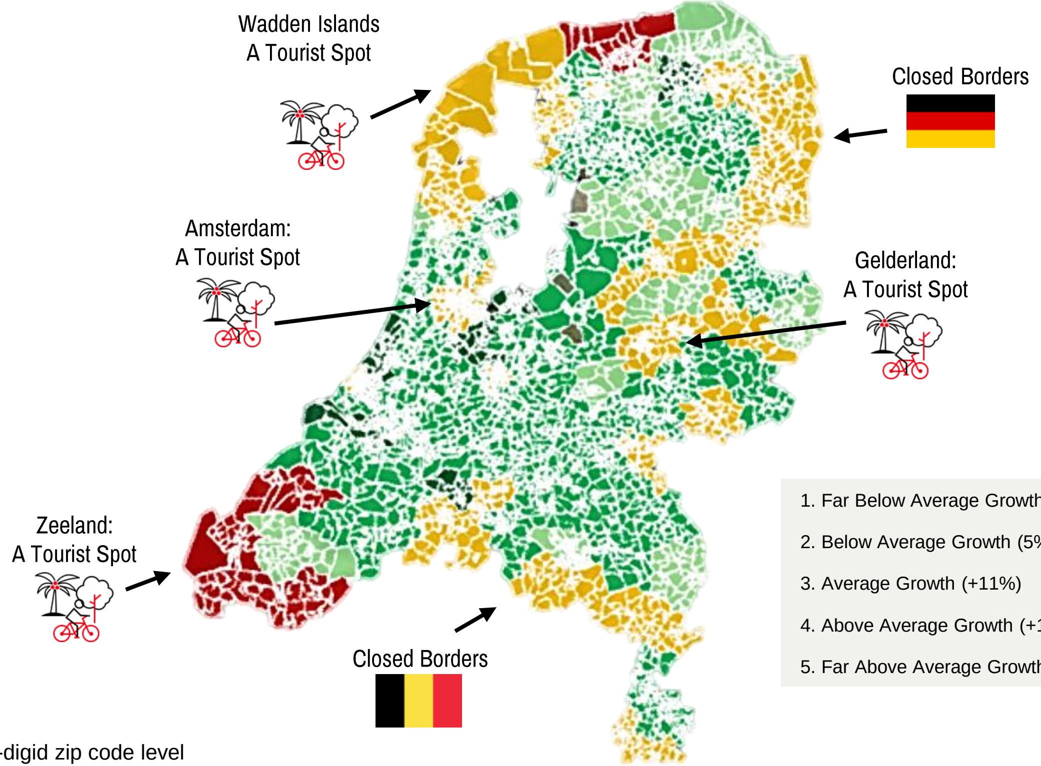
# SLOWER SALES GROWTH AT THE BORDER DURING COVID-19

Additionally, slower development is visible in the non-border regions like Zeeland, Amsterdam, Wadden Islands.

**Food excl Lidl&Aldi - Value evolution – W9-24 2020 vs W9-24 2019**

This is a **unique time** that provides the opportunity focus on regional performance, which can greatly vary for different **categories.**
Regional insights can be used to **direct field sales to underperforming regions, improve in-store execution, adjust assortment and marketing tactics to the local needs.**

Contact your Nielsen representative if you want help unraveling the impact on your business today.




1. Far Below Average Growth (1% to 3%)
2. Below Average Growth (5% to 10%)
3. Average Growth (+11%)
4. Above Average Growth (+12% to +15%)
5. Far Above Average Growth (+16% to +18%)

Nielsen: Based on micro-clusters of stores down to 2-digid zip code level

# 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](www.nielsen.com/covid-19), and reach out to your Nielsen representative for help.**