COVID-19 CRISIS

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

Update: October 28th, 2020

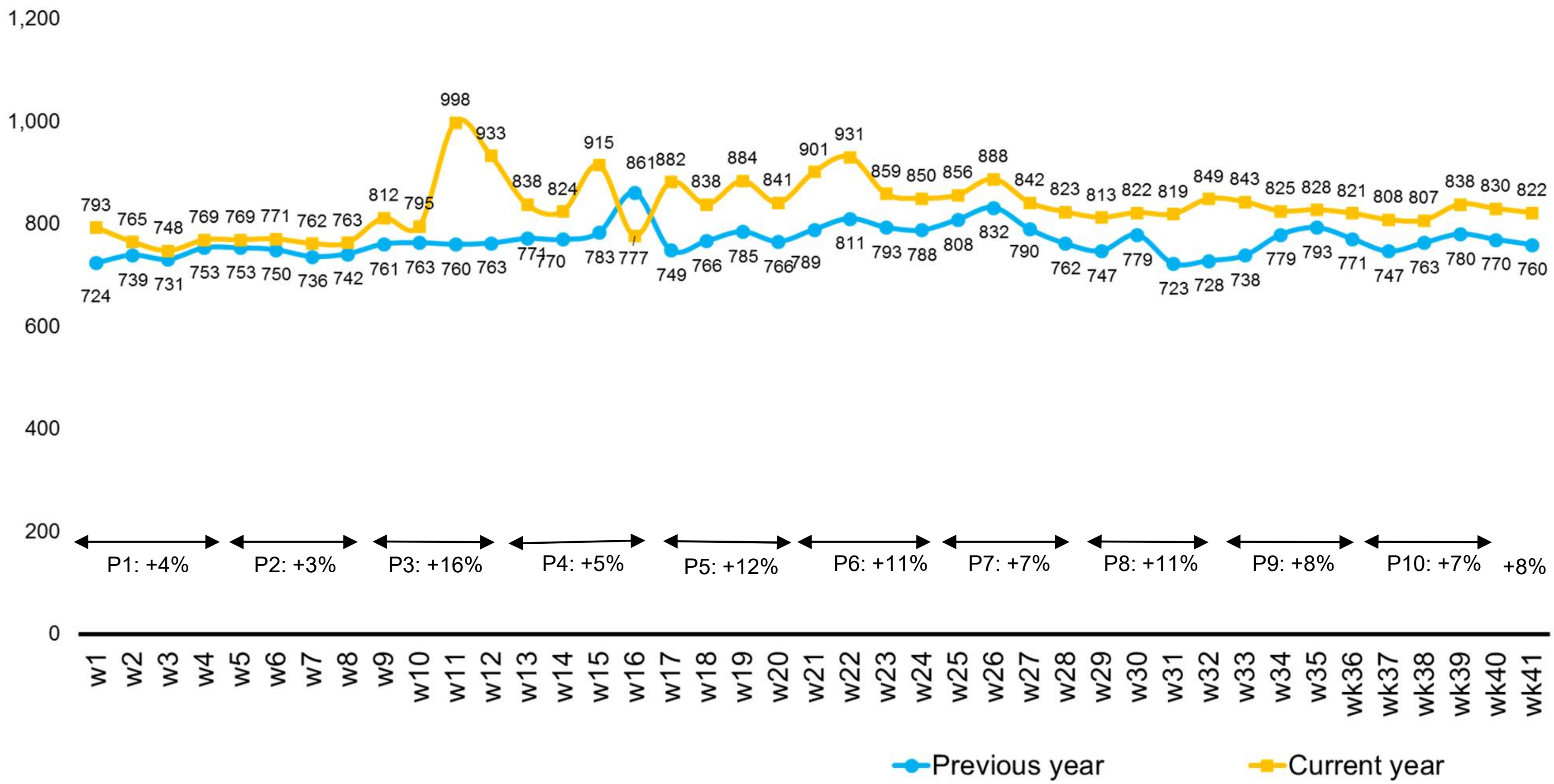
Weekly update

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

SUPERMARKETS

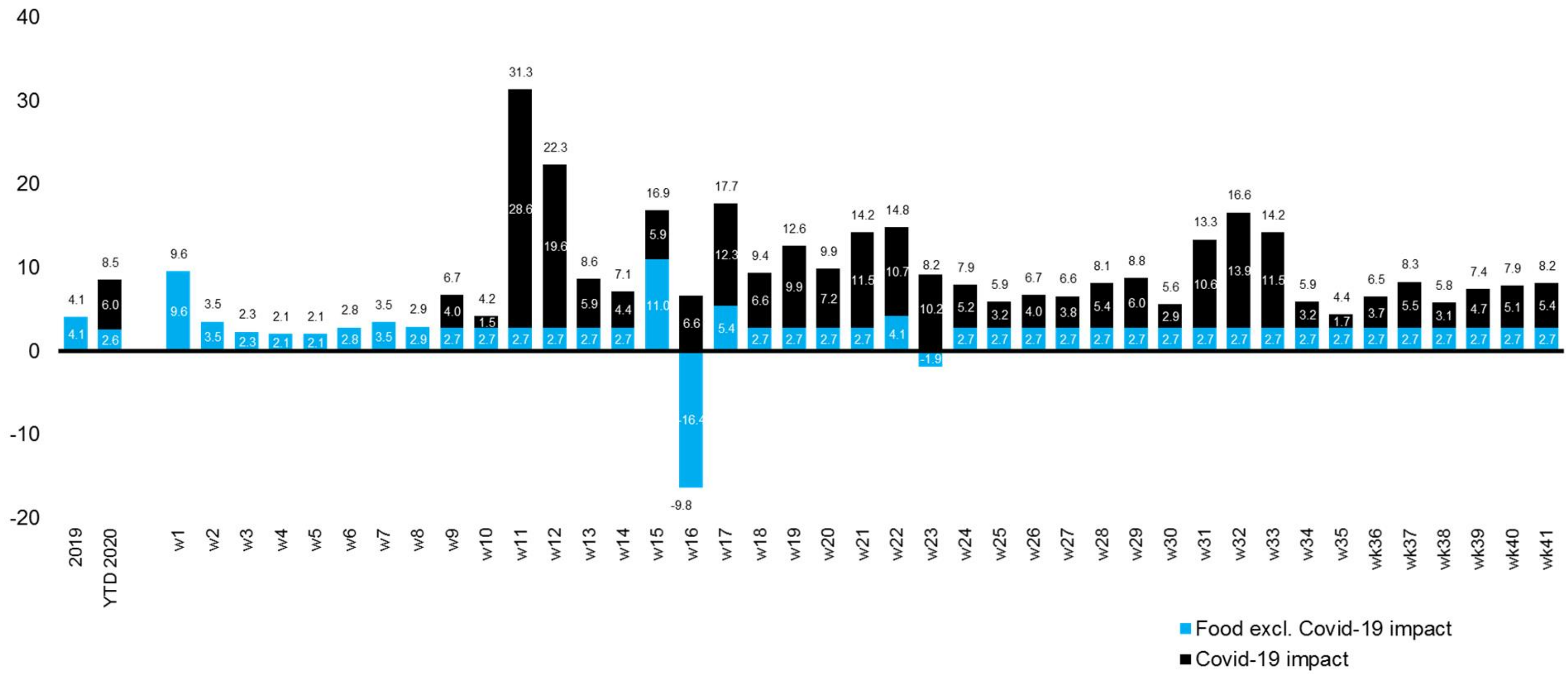
FOOD SALES PER WEEK

Food ACV per week (euro x mln)



IMPACT OF COVID-19 ON SALES

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



Extra growth from wk9	Extra % growth from wk 9	Impact on % YTD growth
€ 1873M	**7.2%**	**6%**

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	P8 20	P9 20	P10 20	wk 41 20
Totaal Supermarkten (ACV)	8.6	2.7	9.6	16.1	5.3	12.4	11.3	6.8	11.0	7.6	7.3	8.2
Dranken Houdbaar	9.5	1.3	10.8	9.5	4.9	16.7	18.0	5.8	11.9	11.0	9.1	7.9
Kruidenierswaren	11.6	3.2	13.5	38.9	10.2	12.8	11.4	9.9	10.6	7.0	7.0	9.8
Zoetwaren & Snacks	5.9	4.1	6.1	12.0	-1.1	5.7	7.1	7.7	11.5	4.1	3.2	3.2
Diepvries	13.6	4.4	15.3	22.5	15.8	23.9	19.0	4.3	10.9	14.8	13.3	14.1
Vers	7.6	2.7	8.5	12.9	6.4	11.8	10.7	6.1	9.5	5.0	6.0	7.0
Schoonmaak & Onderhoud	9.5	2.5	11.4	32.0	13.9	9.4	10.5	3.2	6.6	7.5	10.4	8.1
Drogmetica	9.5	2.9	11.0	54.6	10.1	4.8	3.3	-0.8	7.3	4.8	6.8	9.0
Haarverzorging	-1.1	0.8	-2.1	14.4	6.6	-2.6	-10.3	-6.1	-5.1	-11.2	-3.8	-0.2
Health Care	9.9	6.7	10.8	78.7	8.9	-10.7	-5.8	-6.2	5.6	7.1	4.9	16.5
Lichaamsverzorging	19.6	3.9	23.0	49.7	40.6	36.1	14.9	1.5	16.5	16.6	19.9	15.6
Mondverzorging	7.2	11.5	6.5	33.9	-6.3	8.8	2.7	8.8	6.5	3.8	4.5	-4.3
Papier	8.1	0.6	9.8	61.1	4.2	-1.9	2.7	-1.6	6.5	3.5	5.2	9.1
Rookwaren	9.3	2.7	10.6	6.9	2.8	9.7	14.4	10.1	13.7	13.9	13.3	9.2

SALES INDEX ON CATEGORY LEVEL

Ranked on estimated impact of Covid-19

Overview categories

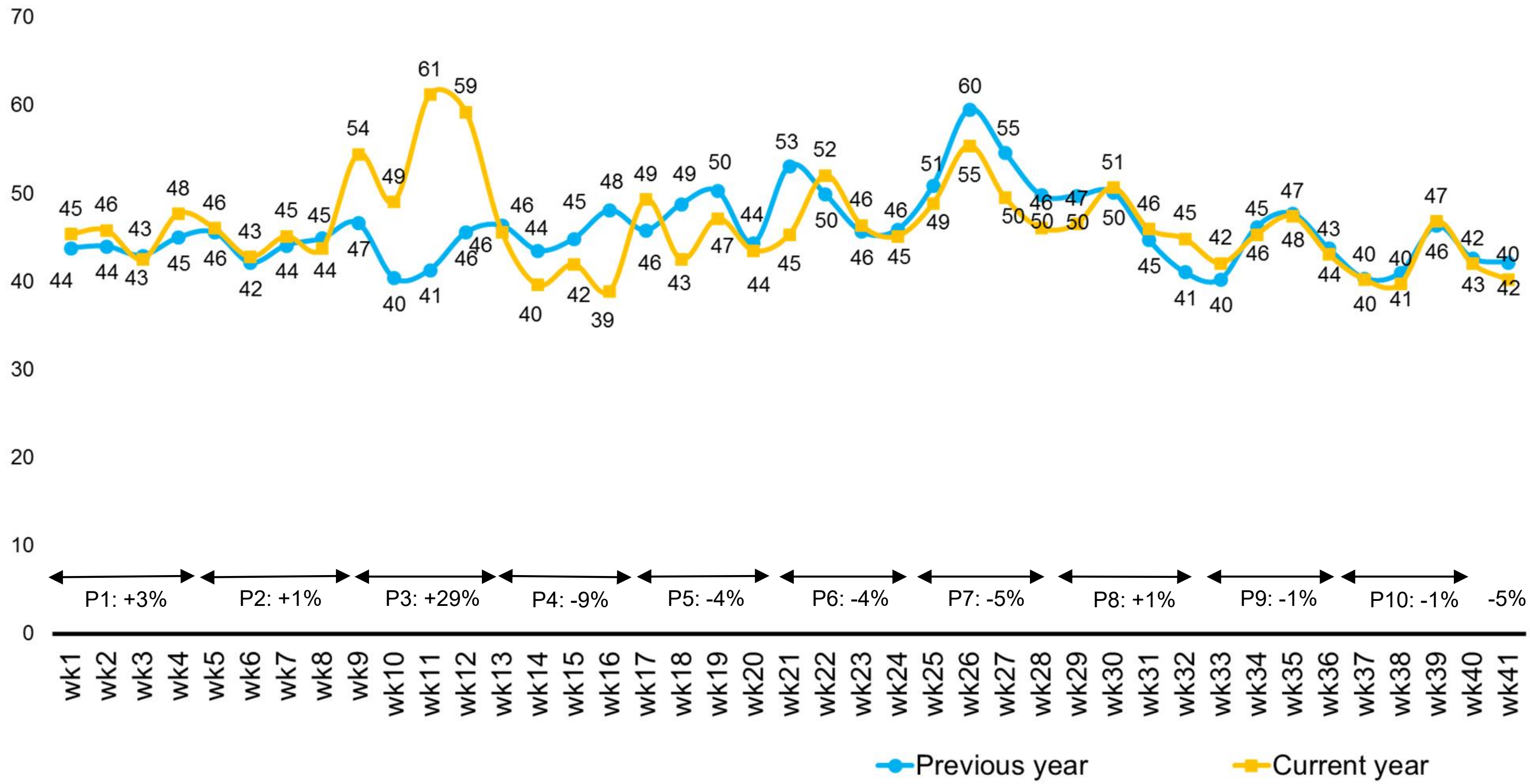
					Index € sales vs PY										
Category	Value index wk2-8 2020/2019	Value index from wk9 2020/2019	Difference in index pts	Est. Impact in € (000) Actual minus expected	wk2-8 20	YTD from wk 9 20	P3 20	P4 20	P5 20	P6 20	P7 20	P8 20	P9 20	P10 20	w41 20
Vlees	100	113	13	192,472	100	113	120	113	117	116	106	115	106	108	113
Fruit	105	115	11	172,832	105	115	116	124	119	117	109	114	111	112	113
Groenten	99	111	12	134,715	99	111	110	112	118	113	108	109	105	111	111
Bier	102	112	10	107,747	102	112	101	104	124	126	103	114	112	112	108
Stille Wijnen	96	111	15	89,385	96	111	101	107	120	119	109	114	108	107	114
Zuivel	102	108	6	58,204	102	108	109	106	110	109	108	108	107	106	106
Koffie excl. oplos	104	117	13	57,977	104	117	121	117	123	128	121	112	107	110	112
Shag	100	114	14	57,678	100	114	107	103	112	120	116	117	118	117	114
Sigaretten	104	109	6	51,074	104	109	106	102	109	112	108	113	113	112	107
Kaas	103	108	5	47,783	103	108	113	104	111	110	108	108	104	105	105
Dv Ijs	107	117	10	36,904	107	117	106	127	155	127	90	106	124	129	124
Frisdranken	104	106	2	30,808	104	106	109	98	108	109	99	107	112	107	102
Brood Afbak	105	126	20	28,119	105	126	143	118	127	132	124	128	120	115	122
Dv Snacks	105	121	17	27,388	105	121	125	125	126	119	121	122	115	116	122
Toiletzeep	104	272	168	27,036	104	272	435	322	322	288	239	212	205	198	212
Pindas Noten+Aanv	103	112	10	24,568	103	112	111	110	123	118	115	114	104	106	109
Smaakmakers	104	126	22	24,538	104	126	127	131	141	131	123	121	114	119	116
Vleeswaren	104	107	3	23,879	104	107	112	103	110	108	109	106	102	103	111
Sauzen	103	114	11	23,156	103	114	118	114	124	121	107	115	107	109	110
Huishoudreinigers	111	136	25	21,392	111	136	171	154	137	139	116	123	123	128	129

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	P8 20	P9 20	P10 20	wk 41 20
Drogmetica	0.6	1.6	0.3	28.8	-9.1	-3.6	-2.9	-7.0	1.3	0.0	-0.9	-4.7
Deco.Cosmetica	-12.9	-1.0	-15.8	-12.4	-35.4	-17.5	-18.5	-9.8	-4.4	-12.2	-15.8	-12.3
Geuren	-10.8	-1.3	-12.8	-16.1	-43.2	-9.6	-26.7	16.5	-3.2	-8.1	-7.8	-19.0
Haarverzorging	2.7	6.9	1.7	16.5	-1.4	6.0	2.7	-5.0	-1.0	1.3	-1.9	-7.4
Health Care	3.1	0.2	3.8	55.6	-6.8	-8.8	-3.5	-8.3	0.2	3.9	2.2	-3.0
Lichaamsverzorging	3.5	3.1	3.6	21.4	3.0	4.8	5.9	-11.3	6.1	3.9	1.8	3.1
Mondverzorging	0.6	4.2	-0.3	24.9	-18.1	-3.0	-3.1	5.7	1.8	-4.5	-2.2	-12.2
Papier	-0.5	-1.9	-0.1	42.5	-14.2	-9.1	-5.7	-6.6	-1.6	-5.9	2.4	-5.6
Schoonmaak & Onderhoud	9.7	12.0	9.6	44.5	11.3	0.6	9.8	12.5	-2.7	1.3	7.3	4.1
Dranken Houdbaar	5.1	6.2	4.4	28.4	-8.6	-6.3	17.7	-4.7	7.0	7.3	6.4	-10.1
Kruidenierswaren	-4.8	0.3	-6.0	33.3	-25.5	-18.9	-11.7	-7.6	-4.2	-4.9	-7.7	-10.7
Zoetwaren & Snacks	1.1	4.2	0.3	13.0	-19.9	-7.7	-0.6	11.9	6.4	6.3	0.6	-12.1

SALES INDEX ON CATEGORY LEVEL - DRUG

Drug

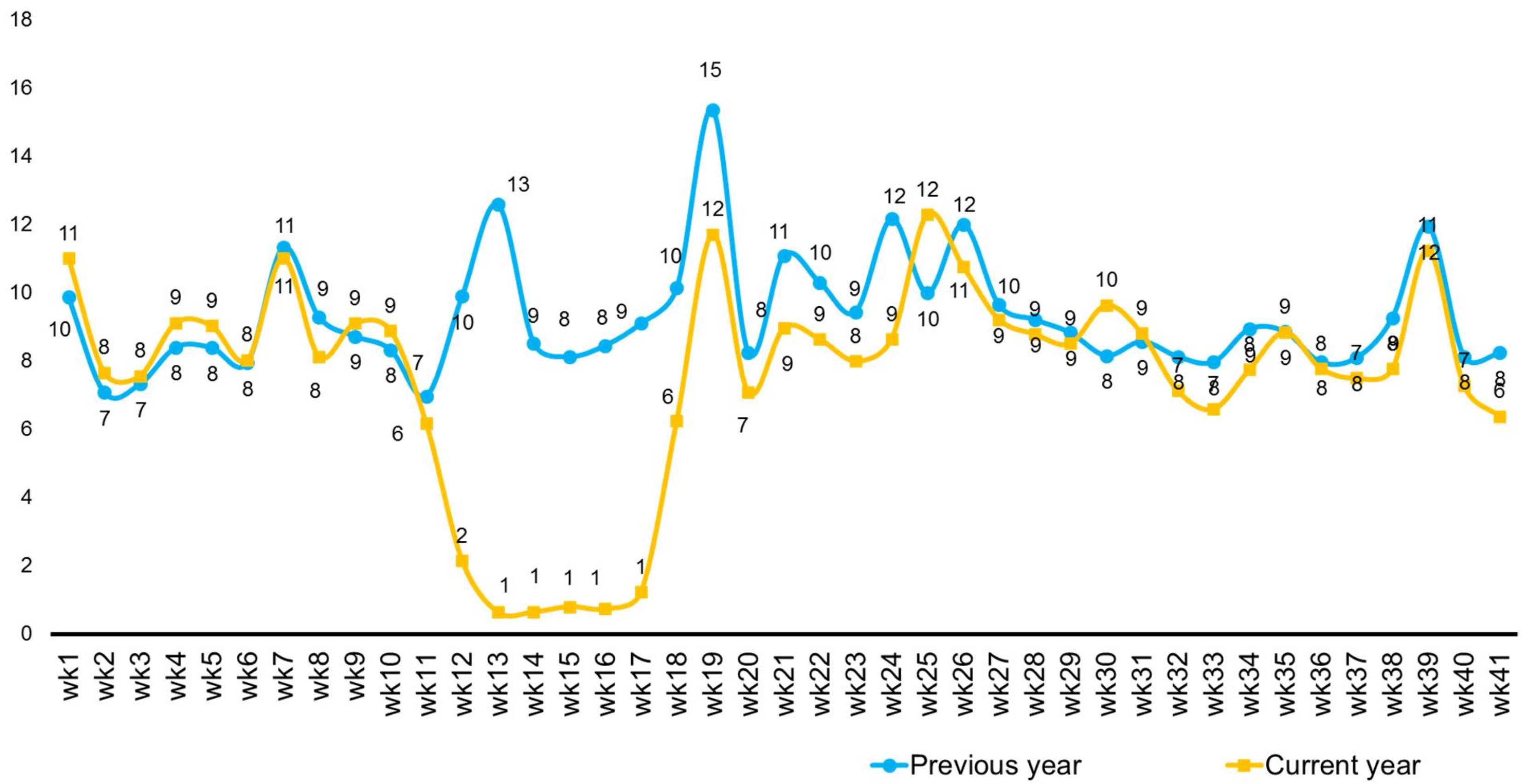
				Index € sales vs PY										
Category	Value index wk2-8 2020/2019	Value index from wk9 2020/2019	Impact in € (000) Actual minus expected	wk2-8 20	YTD from wk 9 20	P3 20	P4 20	P5 20	P6 20	P7 20	P8 20	P9 20	P10 20	w41 20
Toiletzeep	123	262	19,072	123	262	429	238	284	266	224	276	206	195	227
Vit/Mineralen Suppl.	100	118	18,764	100	118	172	111	102	107	112	119	107	113	112
Hand/Bodyproducten	92	111	7,821	92	111	122	136	112	114	95	106	102	100	101
Haarkleurmiddelen	106	118	5,243	106	118	121	156	142	110	102	106	103	102	104
Otc Hoest Verkoudheid En Griep	94	103	2,584	94	103	169	90	83	99	89	103	96	92	79
Vochtige Doekjes	99	111	2,270	99	111	180	104	110	108	94	102	95	111	132
Diagnostica	102	278	2,032	102	278	625	245	204	197	240	195	216	243	253
Celstofbabyluiers	89	93	1,792	89	93	124	77	81	89	90	94	88	100	83
Huishoudreinigers	99	135	1,578	99	135	253	129	97	105	98	134	105	191	105
Schuimbadproducten	101	103	1,095	101	103	121	92	102	97	103	100	108	101	97
Tissues Droog	102	129	819	102	129	201	130	125	116	117	107	120	112	107
Schoonmaakhulpmiddelen	74	125	758	74	125	175	190	130	121	113	83	105	103	55
Papieren Zakdoekjes	103	118	427	103	118	275	88	94	101	92	89	103	87	94
Toiletpapier	85	92	392	85	92	158	86	69	86	79	82	79	89	105
Toiletreinigers	69	145	363	69	145	70	224	165	373	72	73	89	264	91
Anti Kalk	74	156	272	74	156	84	94	133	192	201	187	187	196	205
Vaatwasmiddelen	101	108	262	101	108	155	82	117	158	153	88	91	68	82
Bleekmiddelen	113	134	157	113	134	347	119	65	157	132	110	127	183	67
Machinevaatwasmiddel	107	114	124	107	114	205	137	74	127	173	104	91	92	92
Keukenpapier	120	118	113	120	118	168	116	106	146	98	122	114	89	68

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

LEARN HOW YOU CAN CONTRIBUTE TO THE RESILIENCE OF YOUR SHOPPERS

BUILDING RESILIENCE IN TIMES OF DISRUPTION

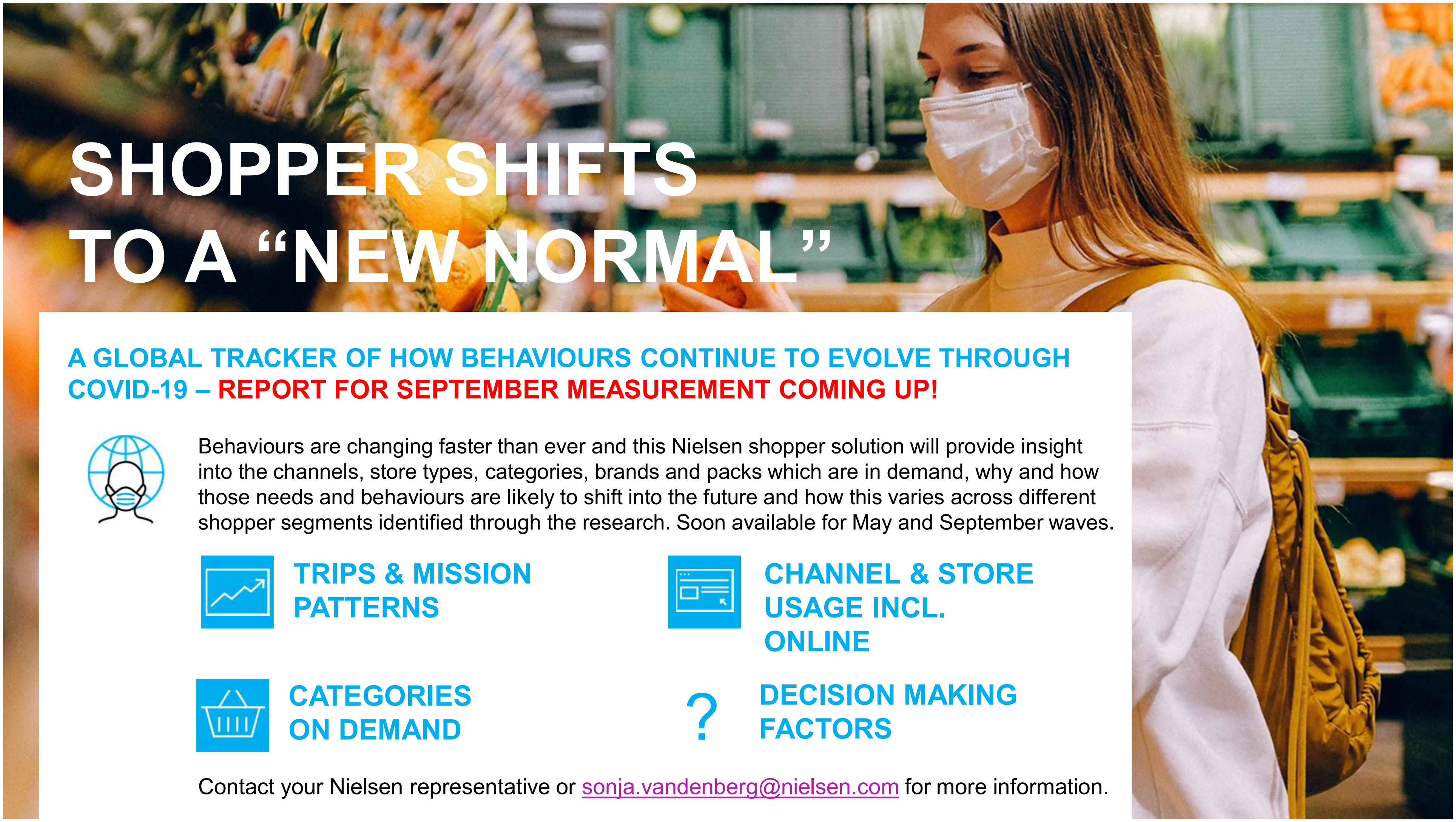
The resilience research we have conducted is about the measurement of resilience in a time of disruption for society as a whole and for FMCG and Retail in particular. The results will give you **input for relevant actions in order to help your consumers to cope with the consequences of the disruption Covid-19 is causing.**

At the same time, we have measured the particular **resilience indexes for different FMCG and Retail brands.** Knowing your specific brand index gives you insight into your performance in the category and it will provide you with the guidelines to help your consumer in the most relevant way to live the disruption.

REPORT AVAILABLE NOW!

Details: n=2000 shoppers, Netherlands & Belgium, in cooperation with Burat and UGent

For more information, please contact Sonja van den Berg (sonja.vandenberg@nielsen.com)


SHOPPER SHIFTS
TO A “NEW NORMAL”
A GLOBAL TRACKER OF HOW BEHAVIOURS CONTINUE TO EVOLVE THROUGH COVID-19 – REPORT FOR SEPTEMBER MEASUREMENT COMING UP!
Behaviours are changing faster than ever and this Nielsen shopper solution will provide insight into the channels, store types, categories, brands and packs which are in demand, why and how those needs and behaviours are likely to shift into the future and how this varies across different shopper segments identified through the research. Soon available for May and September waves.
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.