COVID-19 CRISIS

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

Update: September 24th, 2020

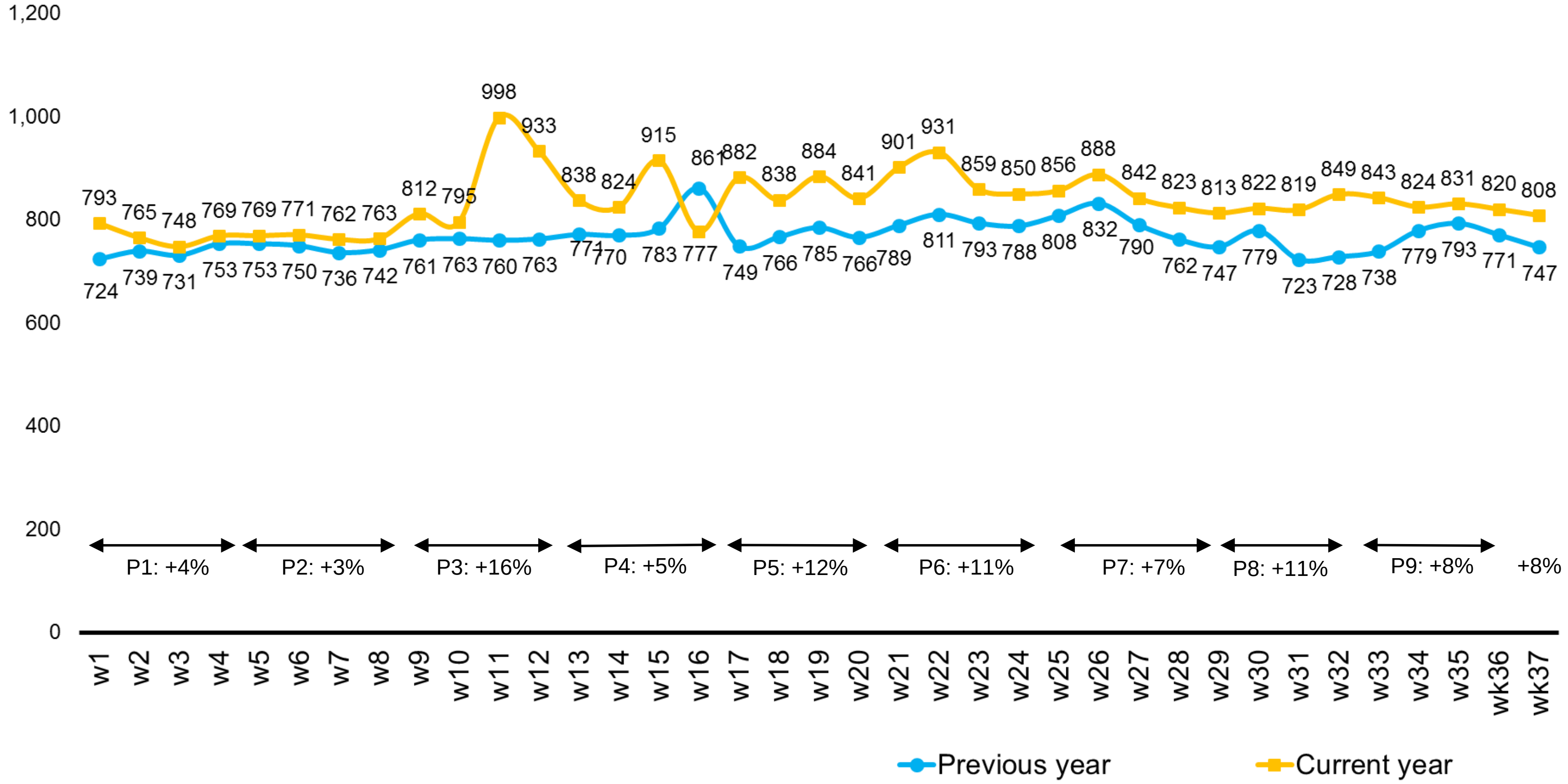
Weekly update

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

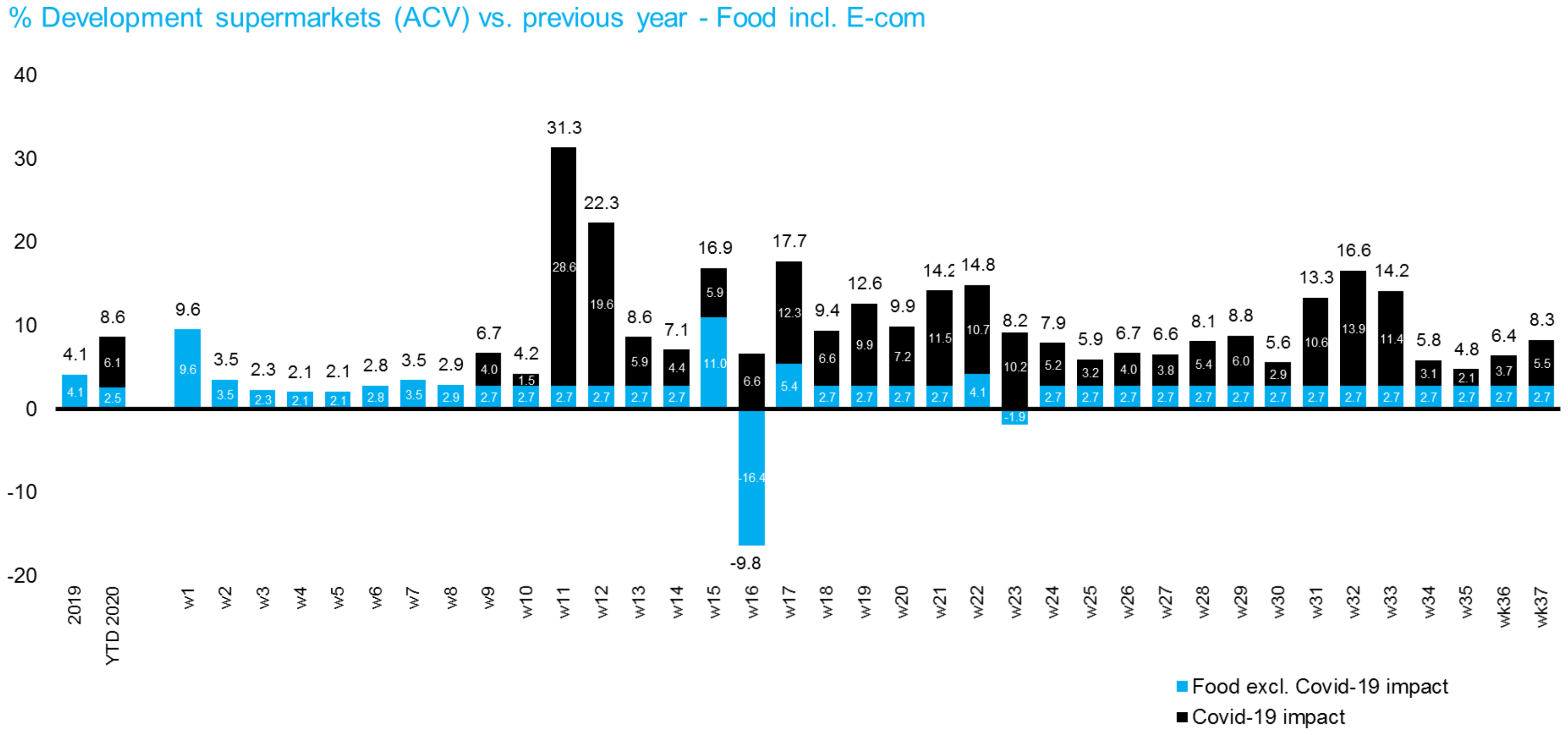
SUPERMARKETS

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
€ 1734M	**7.5%**	**6.1%**

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	wk 37 20
Totaal Supermarkten (ACV)	8.6	2.7	10.0	16.1	5.3	12.4	11.3	6.8	11.0	7.7	8.3
Dranken Houdbaar	9.4	1.3	10.9	9.5	4.9	16.7	18.0	5.7	11.8	10.9	7.7
Kruidenierswaren	12.1	3.2	14.4	39.0	10.2	12.8	11.5	9.9	10.6	6.8	9.0
Zoetwaren & Snacks	6.1	4.1	6.5	12.0	-1.1	5.6	7.1	7.6	11.5	3.9	4.5
Diepvries	13.5	4.4	15.5	22.5	15.8	23.9	19.0	4.3	10.8	14.7	13.2
Vers	7.6	2.7	8.8	12.9	6.4	11.8	10.7	6.1	9.5	4.9	5.8
Schoonmaak & Onderhoud	9.3	2.5	11.4	31.9	13.8	9.3	10.3	3.0	6.2	7.1	8.2
Drogmetica	10.0	2.9	11.9	54.6	10.1	4.8	3.3	-0.9	7.2	4.7	15.6
Haarverzorging	-1.1	0.8	-2.3	14.4	6.6	-2.6	-10.3	-6.1	-5.2	-11.2	-5.3
Health Care	10.7	6.7	11.9	78.7	8.9	-10.7	-5.8	-6.2	5.6	7.1	11.3
Lichaamsverzorging	20.3	3.9	24.4	49.7	40.6	36.1	14.9	1.5	16.5	16.5	50.8
Mondverzorging	10.0	11.5	9.9	33.9	-6.3	8.8	2.7	8.7	6.3	3.3	60.5
Papier	8.2	0.6	10.2	61.1	4.2	-1.9	2.7	-1.6	6.4	3.4	2.3
Rookwaren	9.0	2.7	10.4	6.9	2.8	9.7	14.4	10.1	13.7	13.9	12.5

SALES INDEX ON CATEGORY LEVEL

Ranked on estimated impact of Covid-19

Overview categories

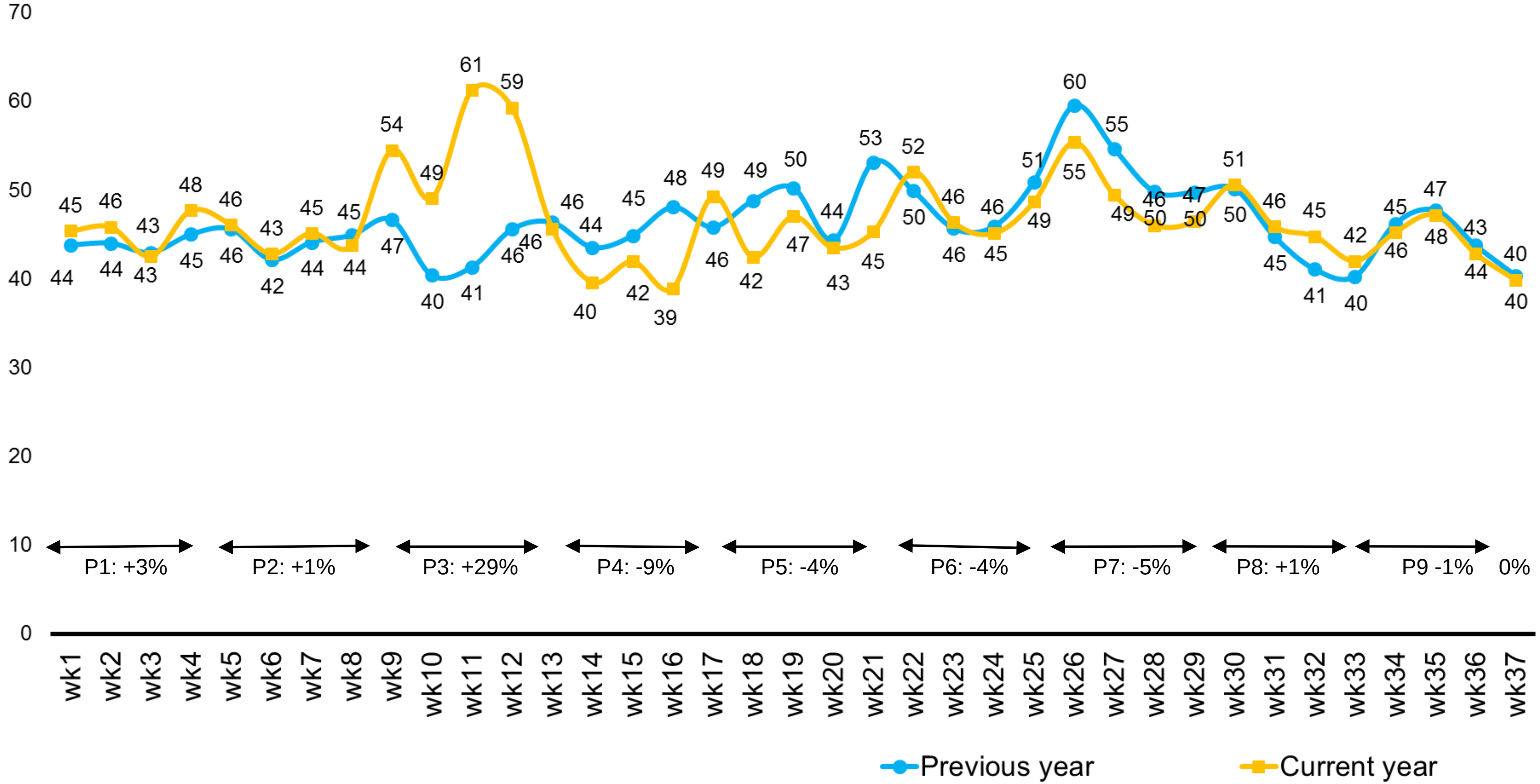
Category	Value index wk2-8 2020/2019	Value index from wk9 2020/2019	Difference in index pts	Est. Impact in € (000) Actual minus expected	Index € sales vs PY wk2-8 20	YTD from wk 9 20	P3 20	P4 20	P5 20	P6 20	P7 20	P8 20	P9 20	w37 20
Vlees	100	113	13	164,734	100	113	120	113	118	116	106	114	105	108
Fruit	105	115	11	152,210	105	115	116	124	119	117	109	114	111	108
Groenten	99	111	11	112,853	99	111	110	112	118	113	108	109	105	109
Bier	102	112	10	94,427	102	112	101	104	124	126	103	114	112	114
Stille Wijnen	96	111	15	76,535	96	111	101	106	120	119	109	114	107	105
Koffie excl. oplos	104	118	14	54,379	104	118	121	117	123	128	121	112	107	116
Zuivel	102	108	6	51,924	102	108	109	106	110	109	108	108	106	107
Shag	100	113	14	48,185	100	113	107	103	112	120	116	117	118	116
Kaas	103	108	5	44,488	103	108	113	104	111	110	108	108	104	107
Sigaretten	104	109	5	42,976	104	109	106	102	109	112	108	113	113	111
Dv Ijs	107	116	9	31,641	107	116	106	127	155	127	90	106	124	121
Vleeswaren	104	108	4	27,679	104	108	112	103	110	108	109	108	104	106
Brood Afbak	105	127	22	25,441	105	127	143	118	127	132	124	128	120	118
Frisdranken	104	106	2	24,940	104	106	109	98	108	109	99	107	112	103
Toiletzeep	104	285	181	24,486	104	285	435	322	322	288	239	212	205	254
Dv Snacks	105	122	17	23,811	105	122	125	125	126	119	121	122	115	118
Pindas Noten+Aanv	103	113	10	23,202	103	113	111	110	123	118	115	114	104	107
Smaakmakers	104	127	22	21,376	104	127	127	131	141	131	123	121	114	127
Sauzen	103	115	11	20,732	103	115	118	114	124	121	107	114	107	105
Groentenconserven	104	121	17	19,132	104	121	184	110	103	114	113	117	106	109

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	wk 37 20
Drogmetica	0.7	1.6	0.4	28.8	-9.1	-3.7	-3.0	-7.2	1.1	-0.4	-1.2
Deco.Cosmetica	-12.6	-1.0	-15.8	-12.4	-35.4	-17.5	-18.5	-9.8	-4.4	-12.5	-10.7
Geuren	-11.2	-1.2	-13.5	-16.1	-43.3	-9.9	-27.1	15.6	-3.8	-8.6	-8.4
Haarverzorging	3.3	6.9	2.3	16.5	-1.4	6.0	2.6	-5.1	-1.1	0.8	-0.7
Health Care	3.3	0.2	4.1	55.6	-6.8	-8.8	-3.6	-8.4	0.0	3.5	3.4
Lichaamsverzorging	3.4	3.1	3.4	21.4	2.9	4.5	5.7	-11.6	6.0	3.6	-1.3
Mondverzorging	1.0	4.2	0.0	24.9	-18.1	-3.0	-3.1	5.5	1.4	-5.0	-7.2
Papier	-0.7	-1.9	-0.3	42.5	-14.2	-9.1	-5.7	-6.6	-1.7	-6.3	1.4
Schoonmaak & Onderhoud	9.7	12.0	9.4	44.5	11.3	0.6	9.8	12.5	-2.9	1.1	-5.3
Dranken Houdbaar	5.3	6.2	4.5	28.4	-8.6	-6.3	17.7	-4.7	7.0	7.3	-1.4
Kruidenierswaren	-4.5	0.3	-5.7	33.3	-25.5	-18.9	-11.7	-7.7	-4.3	-5.1	-7.6
Zoetwaren & Snacks	1.5	4.2	0.7	13.0	-19.9	-7.7	-0.6	11.9	6.4	4.7	3.7

SALES INDEX ON CATEGORY LEVEL - DRUG

Drug

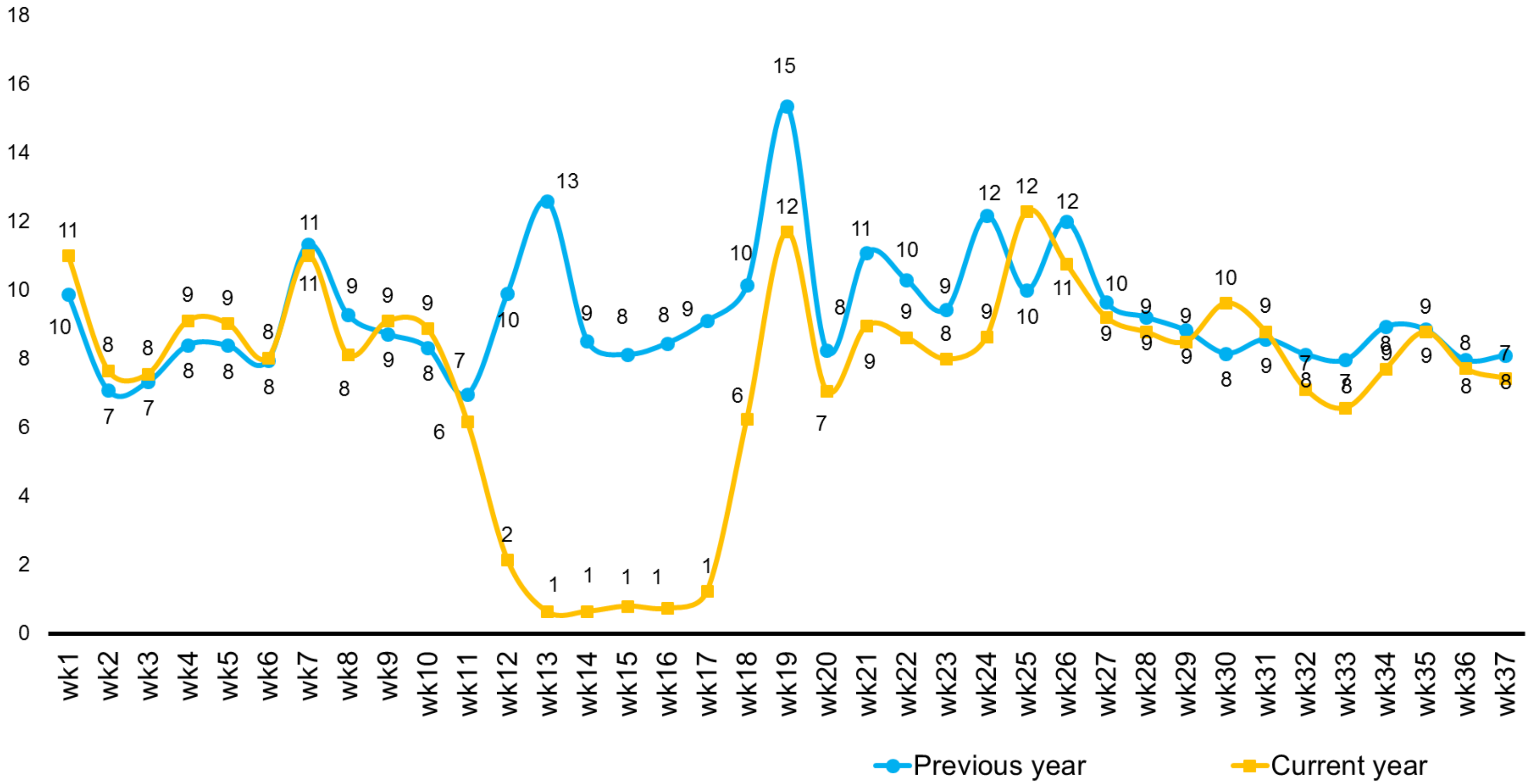
Category	Value index wk2-8 2020/2019	Value index from wk9 2020/2019	Impact in € (000) Actual minus expected	Index € sales vs PY									
				wk2-8 20	YTD from wk 9 20	P3 20	P4 20	P5 20	P6 20	P7 20	P8 20	P9 20	w37 20
Toiletzeep	123	271	17,653	123	271	429	238	283	266	224	276	206	202
Vit/Mineralen Suppl.	100	119	16,746	100	119	172	111	102	107	112	118	106	112
Hand/Bodyproducten	92	112	7,461	92	112	122	136	111	114	94	106	102	102
Haarkleurmiddelen	106	120	5,304	106	120	121	156	142	110	102	106	102	112
Otc Hoest Verkoudheid En Griep	94	106	3,843	94	106	169	90	83	99	89	103	96	103
Vochtige Doekjes	99	110	1,910	99	110	180	104	110	108	94	101	94	106
Diagnostica	102	281	1,799	102	281	625	245	204	197	240	195	216	210
Celstofbabyluiers	89	92	1,475	89	92	124	77	81	89	90	94	88	102
Huishoudreinigers	99	130	1,213	99	130	253	129	97	105	98	132	102	208
Tissues Droog	102	133	801	102	133	201	130	125	116	117	103	113	193
Schoonmaakhulpmiddelen	74	129	758	74	129	175	190	130	121	113	83	105	91
Schuimbadproducten	101	102	648	101	102	121	92	101	96	102	100	108	92
Papieren Zakdoekjes	103	123	515	103	123	275	88	94	101	92	89	103	102
Vaatwasmiddelen	101	115	317	101	115	155	82	117	158	153	88	91	38
Toiletpapier	85	92	306	85	92	158	86	69	86	79	82	77	84
Toiletreinigers	69	131	261	69	131	70	224	165	373	72	73	89	92
Machinevaatwasmiddel	107	116	247	107	116	205	137	74	127	173	104	91	71
Anti Kalk	74	150	223	74	150	84	94	133	192	201	187	187	185
Keukenpapier	120	124	211	120	124	168	116	106	146	98	122	114	108
Bleekmiddelen	113	131	130	113	131	347	119	65	157	132	110	127	106

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

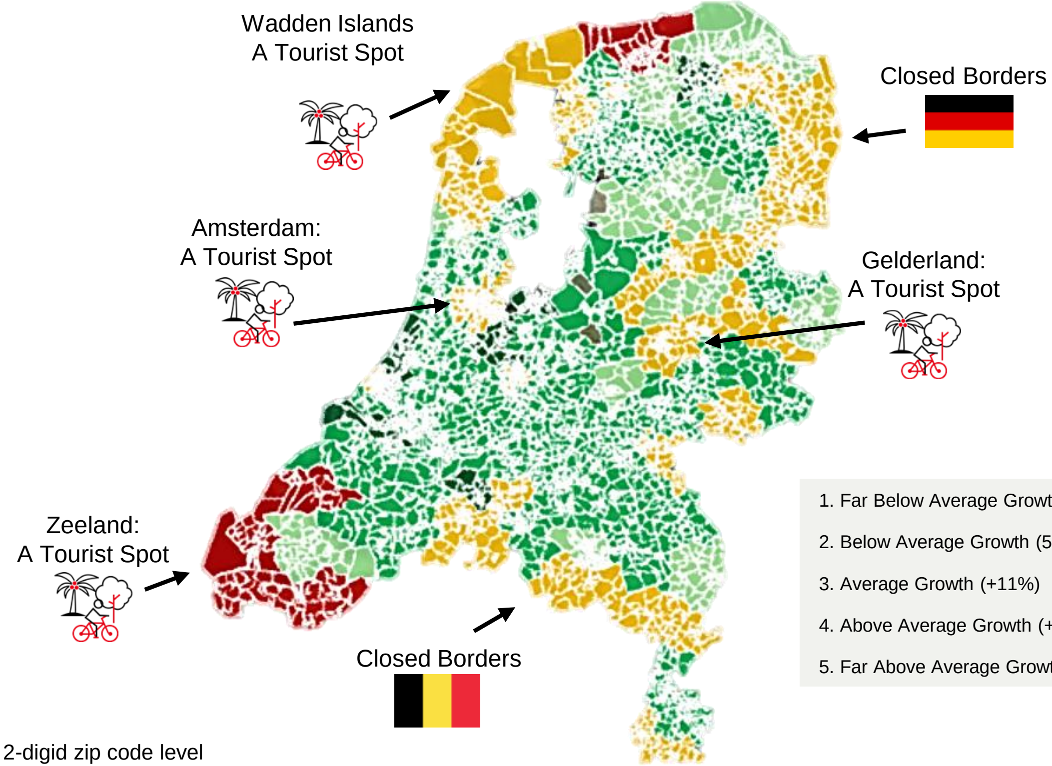
SLOWER SALES GROWTH AT THE BORDER DURING COVID-19

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, and reach out to your Nielsen representative for help.