COVID-19 CRISIS

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

Update: November 19th, 2020

This artwork was created using Nielsen data.

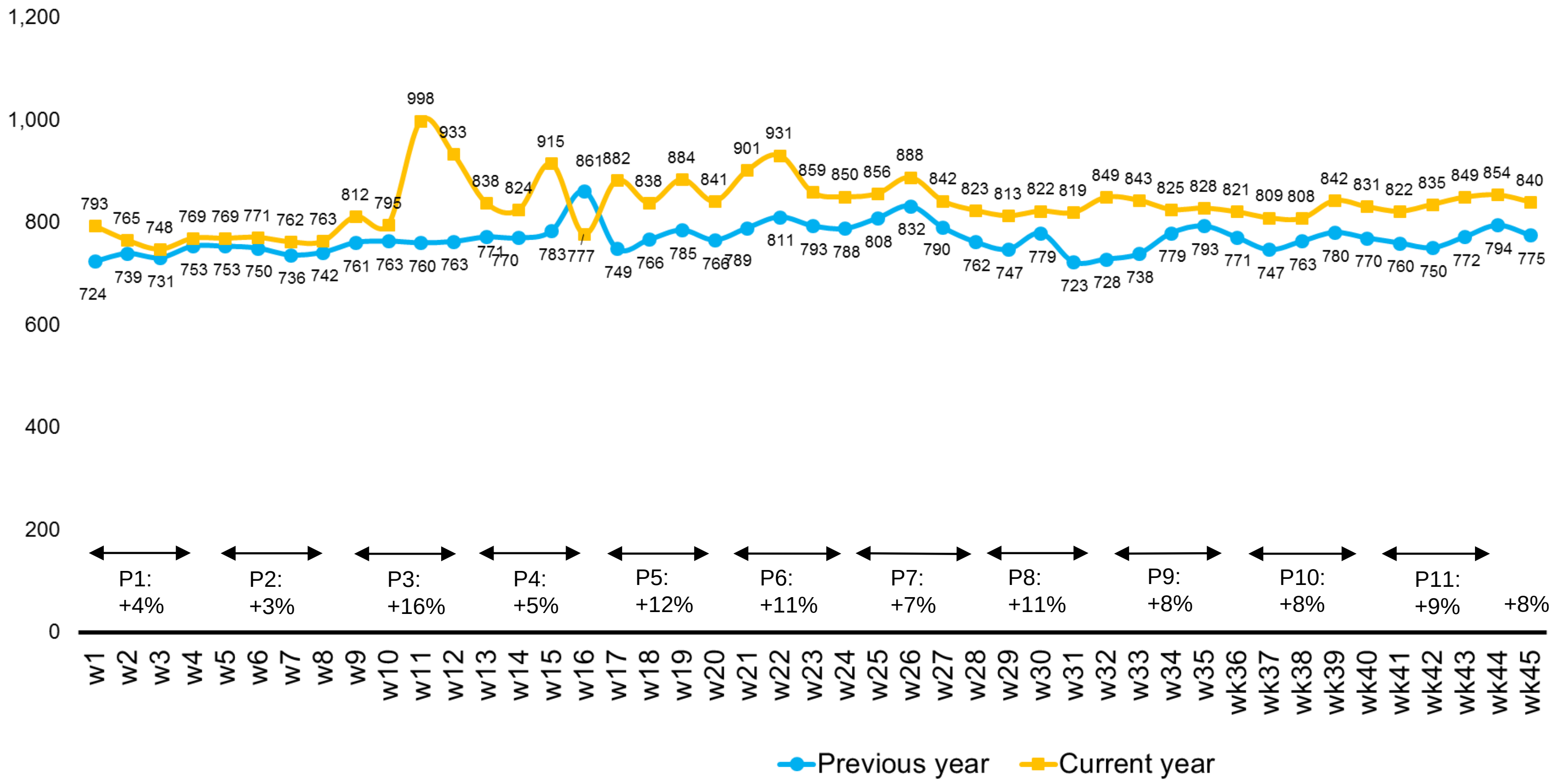
Weekly update

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

SUPERMARKETS

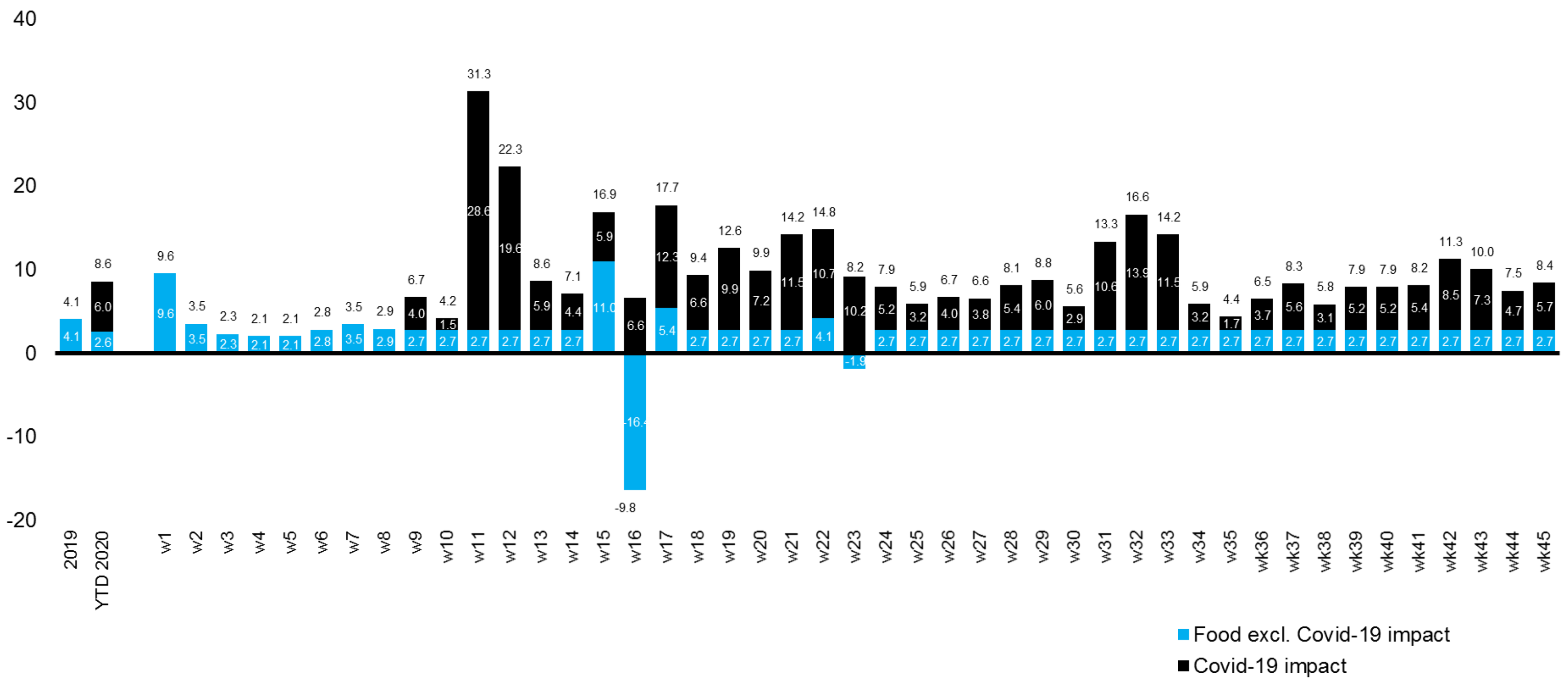
FOOD SALES PER WEEK

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
€ 2080M	**7.1%**	**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

nr		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	P11 20	wk 45 20
1	Totaal Supermarkten (ACV)	8.6	2.7	9.6	16.1	5.3	12.4	11.3	6.8	11.0	7.6	7.5	9.2	8.4
2	Dranken Houdbaar	9.5	1.3	10.8	9.6	4.9	16.7	18.0	5.8	11.9	11.0	9.1	9.3	12.6
3	Kruidenierswaren	11.5	3.2	13.3	39.0	10.2	12.8	11.5	9.9	10.7	7.0	7.3	11.1	9.5
4	Zoetwaren & Snacks	5.7	4.1	5.9	12.0	-1.1	5.7	7.1	7.7	11.5	4.2	3.3	5.1	1.4
5	Diepvries	13.7	4.4	15.3	22.5	15.7	23.9	19.0	4.3	10.9	14.8	13.4	14.6	16.0
6	Vers	7.6	2.7	8.5	12.9	6.5	11.8	10.8	6.2	9.6	5.1	6.1	8.0	7.2
7	Schoonmaak & Onderhoud	9.4	2.5	11.1	32.0	13.9	9.4	10.5	3.2	6.6	7.8	10.8	7.3	10.9
8	Drogmetica	9.6	2.9	11.0	54.6	10.1	4.8	3.3	-0.8	7.4	4.9	7.0	9.6	7.0
9	Haarverzorging	-1.4	0.8	-2.5	14.4	6.6	-2.6	-10.3	-6.1	-5.1	-11.1	-3.6	-2.7	-5.5
10	Health Care	9.9	6.7	10.6	78.7	8.9	-10.7	-5.8	-6.1	5.6	7.2	5.6	8.3	5.8
11	Lichaamsverzorging	19.4	3.9	22.5	49.7	40.6	36.2	15.0	1.6	16.7	16.8	20.5	15.2	20.8
12	Mondverzorging	7.9	11.5	7.5	33.9	-6.3	8.8	2.7	8.8	6.6	3.8	4.7	4.8	3.4
13	Papier	8.3	0.6	9.9	61.1	4.2	-1.9	2.7	-1.6	6.5	3.5	5.2	10.9	5.9
14	Rookwaren	9.2	2.7	10.4	6.9	2.8	9.7	14.4	10.1	13.7	13.9	13.3	8.4	9.6

SALES INDEX ON CATEGORY LEVEL

Ranked on estimated impact of Covid-19

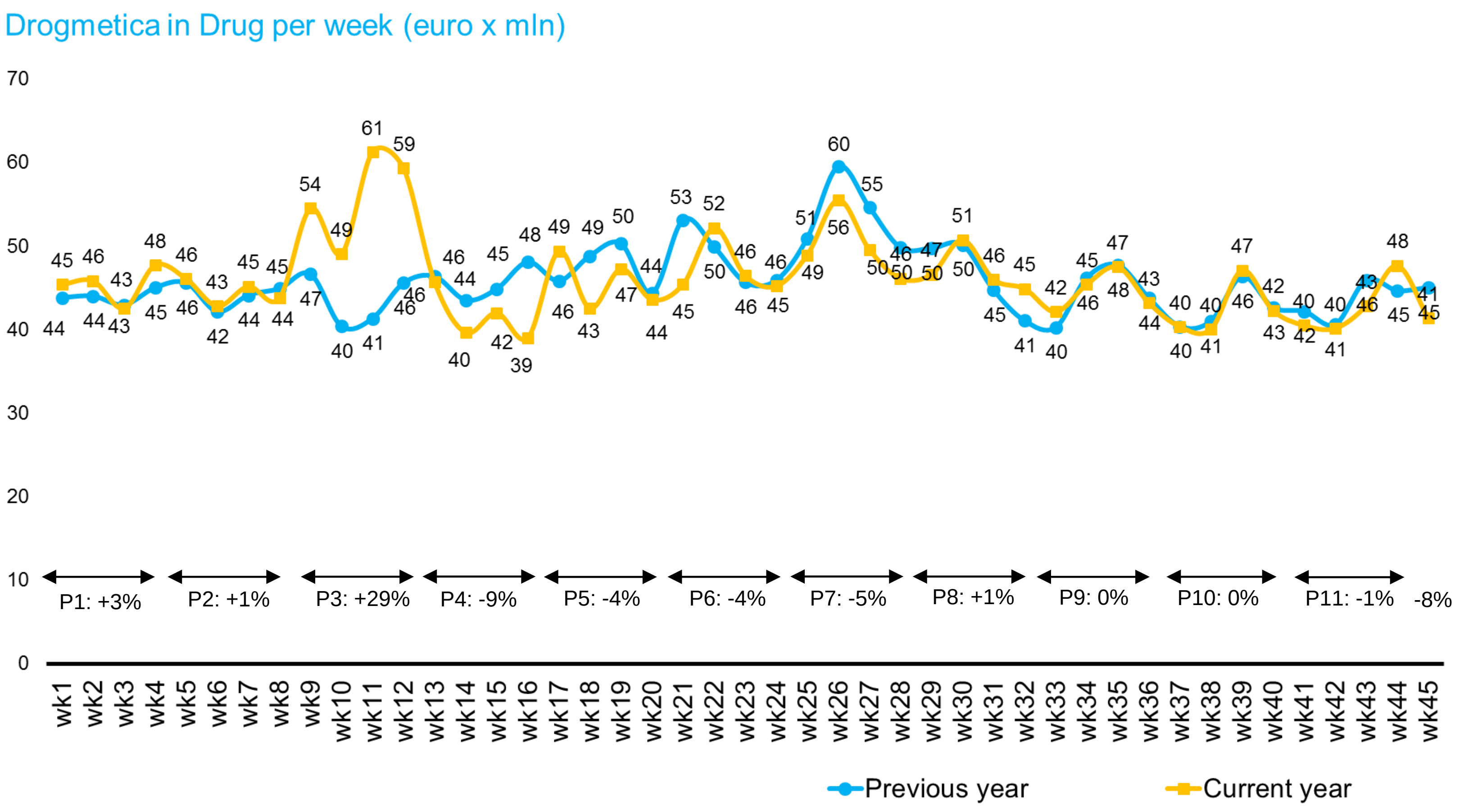
Overview categories

Nr	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	P10 20	P11 20	w45 20
1	Vlees	100	113	13	210,972	100	113	120	113	118	116	107	116	106	108	114	114
2	Fruit	105	115	11	188,917	105	115	117	124	119	117	109	115	112	112	116	116
3	Groenten	99	111	12	149,641	99	111	110	112	118	113	108	109	105	111	114	112
4	Bier	102	112	10	113,972	102	112	101	104	124	126	103	114	112	112	111	112
5	Stille Wijnen	96	111	15	97,233	96	111	101	107	120	120	109	115	108	107	110	115
7	Koffie excl. oplos	104	117	13	64,683	104	117	121	117	123	128	121	112	107	110	114	129
10	Shag	100	114	14	62,758	100	114	107	103	112	120	116	117	118	117	114	115
6	Zuivel	102	108	5	62,734	102	108	109	106	110	109	108	108	107	106	108	109
8	Sigaretten	104	109	5	52,862	104	109	106	102	109	112	108	113	113	112	106	107
11	Kaas	103	107	5	47,502	103	107	113	104	111	110	108	108	104	105	105	102
16	Dv Ijs	107	117	10	39,215	107	117	106	127	155	127	90	106	124	129	117	143
9	Frisdranken	104	106	2	32,201	104	106	109	98	108	109	99	107	112	107	104	106
14	Brood Afbak	105	125	20	30,089	105	125	143	118	127	132	124	128	120	115	124	119
13	Dv Snacks	105	121	16	29,471	105	121	125	125	126	119	121	122	115	116	121	120
18	Toiletzeep	104	269	165	28,721	104	269	435	322	322	290	239	213	206	198	230	226
17	Smaakmakers	104	125	21	26,317	104	125	127	131	141	131	123	121	114	119	122	129
19	Pindas Noten+Aanv	103	112	9	24,909	103	112	111	110	123	118	115	114	104	106	109	102
21	Sauzen	103	114	11	24,680	103	114	118	114	124	121	107	115	107	109	112	114
15	Vleeswaren	104	107	3	24,009	104	107	112	103	110	108	109	106	102	103	107	105
20	Huishoudreinigers	111	136	25	23,074	111	136	171	154	137	139	116	123	123	128	129	136

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



DEVELOPMENT SUPERGROUPS IN DRUG

% Value development supergroups - Drug

nr		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	P11 20	wk45 20
1	Drogmetica	0.5	1.6	0.2	28.8	-9.1	-3.4	-2.8	-6.9	1.4	0.1	-0.4	-1.3	-8.2
2	Deco.Cosmetica	-13.2	-1.0	-15.9	-12.4	-35.4	-17.5	-18.5	-9.8	-4.4	-12.1	-15.1	-16.5	-17.9
3	Geuren	-11.9	-1.2	-13.8	-16.1	-43.2	-9.6	-26.4	17.0	-3.1	-7.7	-7.4	-21.9	-28.1
4	Haarverzorging	2.3	6.9	1.4	16.5	-1.4	6.0	2.7	-5.0	-1.0	1.4	-1.6	-2.0	-7.7
5	Health Care	3.6	0.2	4.3	55.7	-6.6	-8.5	-3.3	-8.1	0.3	4.0	2.5	6.1	1.3
6	Lichaamsverzorging	3.1	3.1	3.0	21.4	3.0	4.8	6.0	-11.3	6.1	4.1	2.2	0.8	-12.2
7	Mondverzorging	0.2	4.2	-0.7	24.9	-18.0	-2.7	-2.7	5.9	2.0	-4.2	-1.9	-5.5	-11.2
8	Papier	-0.6	-1.9	-0.2	42.5	-14.2	-9.1	-5.7	-6.6	-1.5	-5.9	4.4	-3.2	-5.6
9	Schoonmaak & Onderhoud	10.3	11.9	10.3	44.5	11.3	0.6	9.8	12.5	-2.7	1.3	7.6	13.4	16.5
10	Dranken Houdbaar	6.1	6.2	5.7	28.4	-8.6	-6.3	17.7	-4.7	7.0	7.3	6.4	11.4	5.8
11	Kruidenierswaren	-4.1	1.1	-5.1	35.6	-23.9	-18.0	-10.2	-6.9	-3.6	-4.2	-6.6	-4.3	-20.9
12	Zoetwaren & Snacks	1.3	4.1	0.7	13.2	-19.8	-7.6	-0.4	12.0	6.1	6.5	1.7	-1.2	-0.9

SALES INDEX ON CATEGORY LEVEL - DRUG

Drug

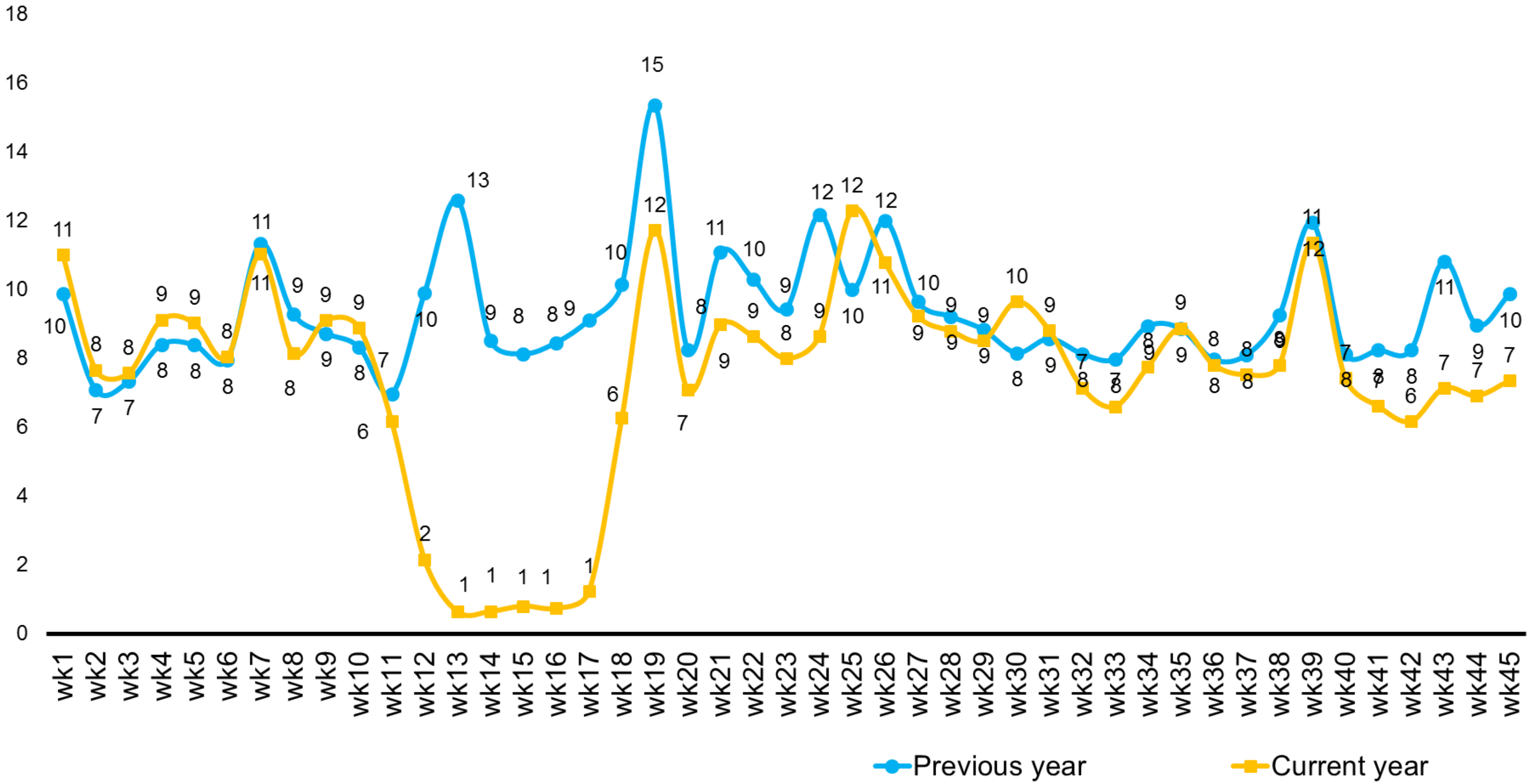
Nr	Category	Value index wk2-8 2020/2019	Value index from wk9 2020/2019	Impact in € (000) Actual minus expected	Index € sales vs PY: wk2-8 20	YTD from wk 9 20	P3 20	P4 20	P5 20	P6 20	P7 20	P8 20	P9 20	P10 20	P11 20	w45 20
1	Vit/Mineralen Suppl.	100	121	26,042	100	121	172	111	102	107	112	119	107	114	141	132
2	Toiletzeep	123	256	20,408	123	256	429	238	284	266	224	277	206	196	215	155
3	Hand/Bodyproducten	92	109	7,936	92	109	122	136	112	114	95	107	102	101	100	88
4	Haarkleurmiddelen	106	116	5,172	106	116	121	156	142	110	102	106	103	102	100	110
7	Diagnostica	102	281	2,341	102	281	625	245	204	197	240	195	227	260	282	253
6	Vochtige Doekjes	99	110	2,274	99	110	180	104	110	108	94	102	95	113	104	91
9	Celstofbabyluiers	89	93	2,137	89	93	124	77	81	89	90	94	88	100	92	95
10	Huishoudreinigers	99	137	1,882	99	137	253	129	97	105	98	134	105	191	144	164
12	Tissues Droog	102	127	852	102	127	201	130	125	116	117	107	120	112	114	91
16	Schuimbadproducten	101	102	832	101	102	121	92	102	98	104	100	108	102	101	83
14	Toiletpapier	85	94	719	85	94	158	86	69	86	79	82	79	115	95	86
11	Schoonmaakhulpmiddelen	74	119	699	74	119	175	190	131	121	113	83	105	103	62	66
15	Machinevaatwasmiddel	107	119	619	107	119	205	137	74	127	173	104	91	92	124	385
5	Otc Hoest Verkoudheid En Griep	94	101	613	94	101	169	90	83	99	90	103	96	92	80	72
17	Vaatwasmiddelen	101	117	459	101	117	155	82	117	158	153	88	91	68	196	226
18	Toiletreinigers	69	143	385	69	143	70	224	165	373	72	73	89	264	110	150
21	Voetverzorging	100	99	317	100	99	102	102	116	98	89	98	101	99	87	89
20	Anti Kalk	74	160	316	74	160	84	94	133	192	201	187	187	196	189	220
13	Papieren Zakdoekjes	103	112	294	103	112	275	88	94	101	92	89	103	87	83	67
22	Toiletblokken	113	119	244	113	119	123	85	141	132	115	103	95	135	131	327

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.