COVID-19 CRISIS

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

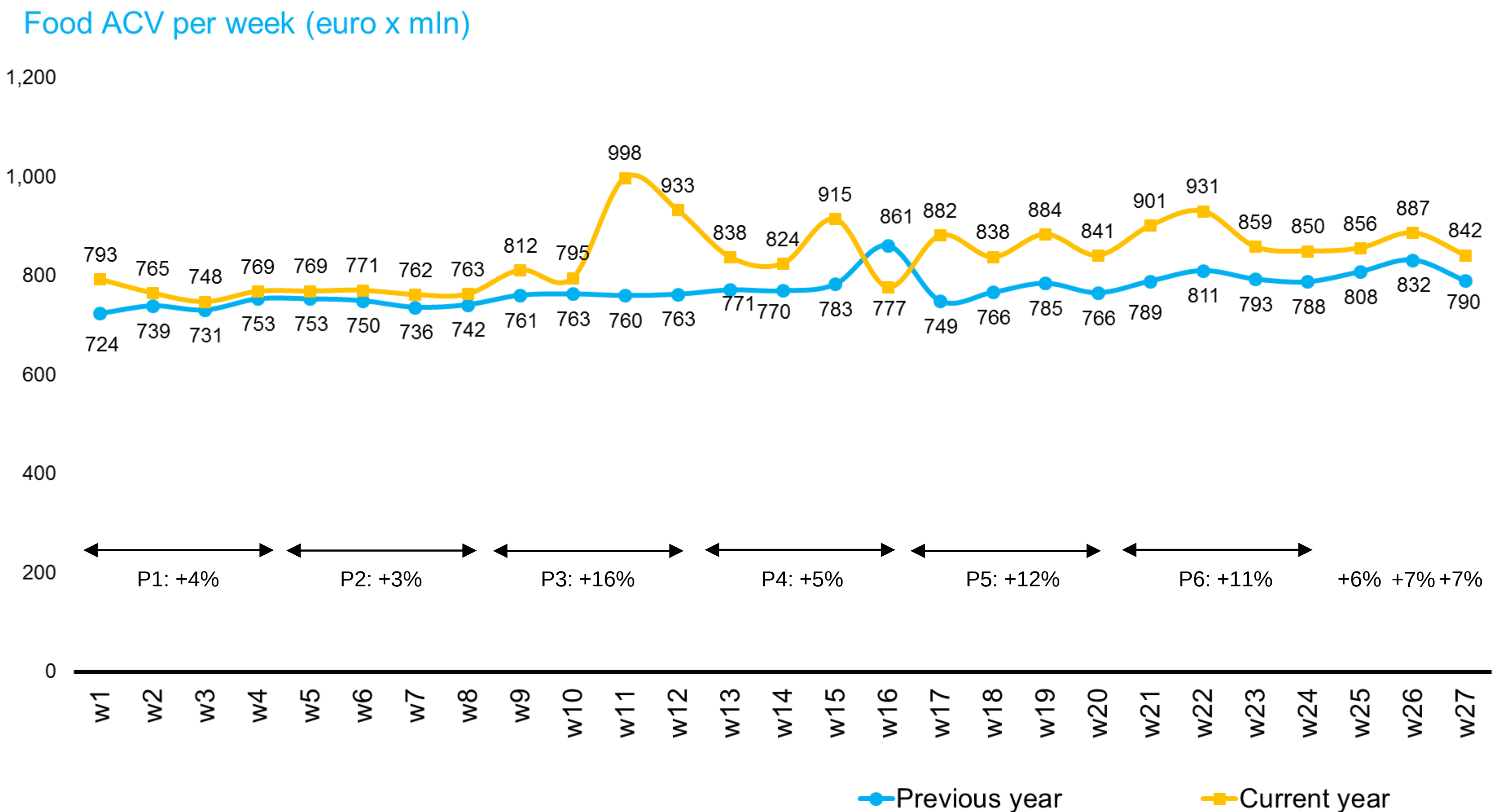
Update: July 17th, 2020

Weekly update

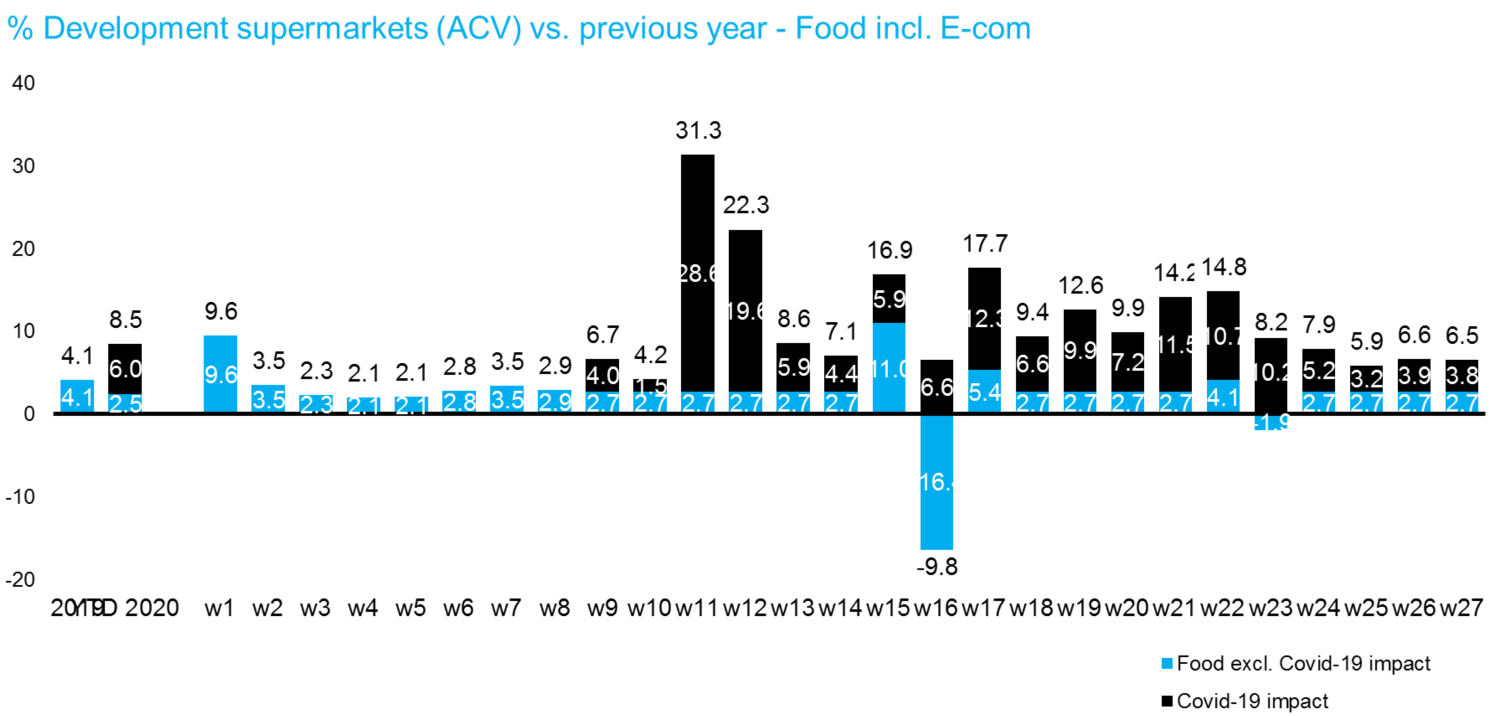
- Impact of COVID-19 on Supermarket Channel
- Drug Channel
- Perfumery Channel

SUPERMARKETS

FOOD SALES PER WEEK



IMPACT OF COVID-19 ON SALES



Extra growth from wk9	Extra % growth from wk 9	Impact on % YTD growth
€ 1253M	**8.2%**	**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	wk 25 20	wk 26 20	wk 27 20
Totaal Supermarkten (ACV)	8.5	2.7	10.4	16.1	5.3	12.4	11.3	5.9	6.6	6.5
Dranken Houdbaar	8.7	1.3	10.8	9.5	4.9	16.7	17.9	3.2	6.2	2.6
Kruidenierswaren	13.1	3.2	17.1	39.0	10.2	12.8	11.3	8.9	10.1	9.8
Zoetwaren & Snacks	5.7	4.1	6.0	12.0	-1.2	5.6	6.9	9.0	8.0	5.7
Diepvries	13.8	4.4	16.8	22.5	15.7	23.8	18.8	2.9	2.6	0.9
Vers	7.8	2.7	9.6	12.9	6.4	11.7	10.6	6.2	6.7	5.0
Schoonmaak & Onderhoud	10.2	2.4	13.9	31.8	13.7	9.2	10.2	3.2	-2.1	8.3
Drogmetica	11.2	2.8	14.6	54.6	9.9	4.6	3.2	-5.9	0.9	-0.8
Haarverzorging	1.4	0.8	0.7	14.4	6.6	-2.6	-10.3	-9.5	-0.5	-5.6
Health Care	12.2	6.7	14.6	78.6	8.9	-10.8	-5.9	-8.9	-6.5	-7.3
Lichaamsverzorging	20.4	3.9	26.6	49.4	40.3	35.6	14.5	-4.7	-7.8	8.4
Mondverzorging	10.3	11.5	10.3	33.9	-6.3	8.8	2.7	-2.5	34.9	-0.5
Papier	9.6	0.6	13.3	61.0	4.1	-1.9	2.7	-5.8	-0.1	-1.9
Rookwaren	7.3	2.7	8.8	6.9	2.8	9.7	14.4	10.2	13.0	6.6

SALES INDEX ON CATEGORY LEVEL

Ranked on estimated impact of Covid-19

Overview categories

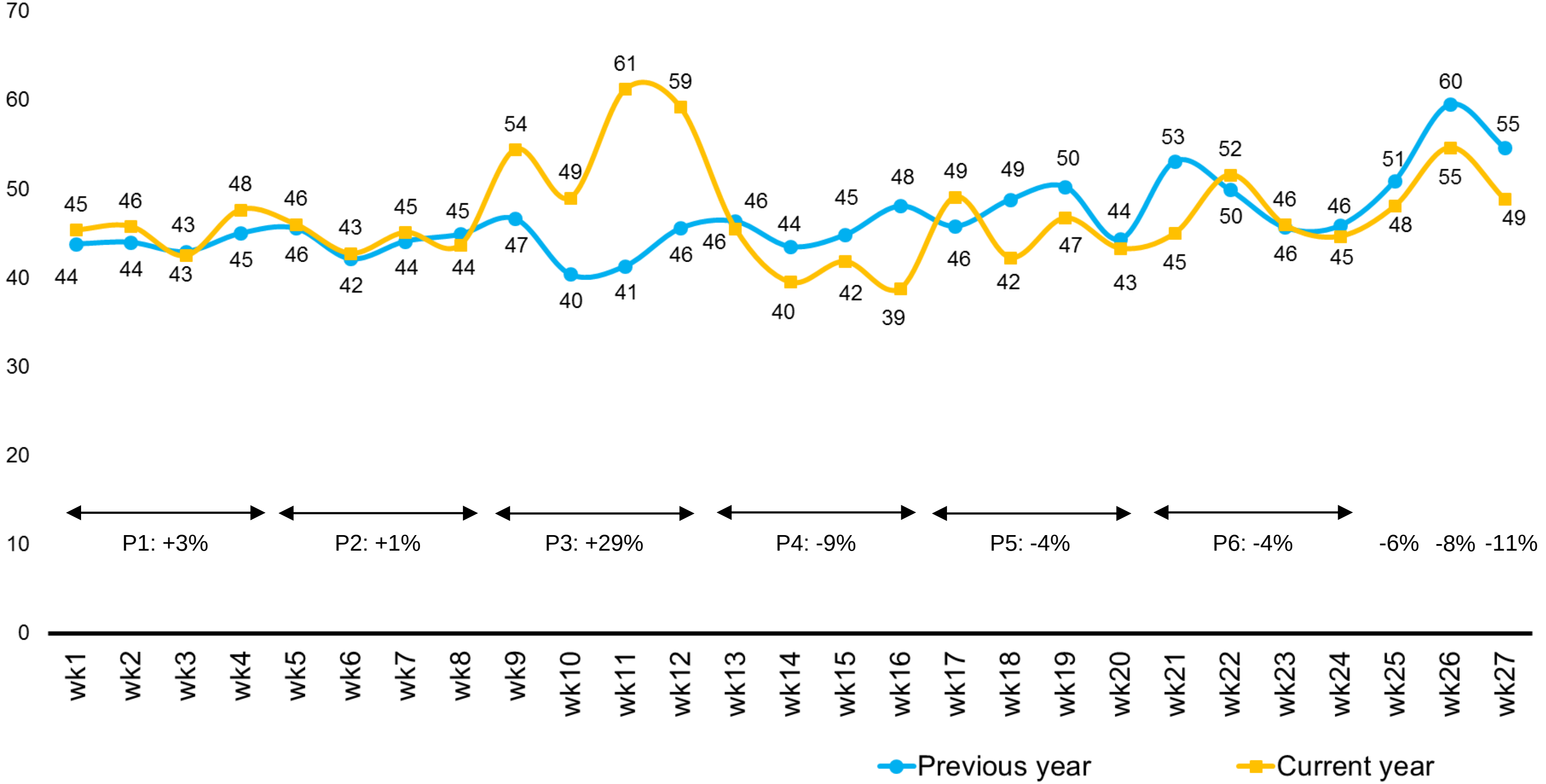
Category	Value index wk2-8 2020/2019	Value index from wk9 2020/2019	Est. Impact in € (000) Actual minus expected	Index € sales vs PY wk2-8 20	YTD from wk 9 20	P3 20	P4 20	P5 20	P6 20	w25	w26	w27
Vlees	100	115	129,496	100	115	120	113	118	116	103	109	108
Fruit	104	117	111,239	104	117	116	124	119	117	107	110	107
Groenten	99	112	90,440	99	112	110	112	117	113	108	110	106
Bier	102	112	57,647	102	112	101	104	124	126	105	101	97
Stille Wijnen	96	111	51,515	96	111	101	106	120	119	109	108	106
Koffie excl. oplos	104	121	43,422	104	121	121	117	123	128	102	133	114
Zuivel	102	109	37,918	102	109	109	106	110	109	107	109	106
Kaas	103	109	36,636	103	109	113	104	111	110	109	109	107
Shag	100	112	27,170	100	112	107	103	112	120	117	120	112
Vleeswaren	104	108	22,335	104	108	112	103	110	108	111	110	106
Dv Ijs	107	118	21,977	107	118	106	127	155	127	85	91	78
Sigaretten	104	107	19,138	104	107	106	102	109	112	108	111	105
Toiletzeep	104	322	18,857	104	322	432	320	320	286	250	247	225
Pindas Noten+Aanv	103	115	18,853	103	115	111	110	123	117	116	120	109
Brood Afbak	105	128	18,642	105	128	143	118	127	132	130	123	119
Dv Snacks	105	123	17,334	105	123	125	125	126	119	119	123	114
Smaakmakers	104	131	17,266	104	131	127	131	141	131	127	129	123
Sauzen	103	117	17,091	103	117	118	114	124	121	106	107	104
Groentenconserven	104	125	16,234	104	125	184	110	103	113	110	112	114
Geelvet	102	112	16,066	102	112	122	106	115	111	109	99	100

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	wk 25 20	wk 26 20	wk 27 20
Drogmetica	0.9	1.6	0.5	28.7	-9.3	-4.1	-3.7	-5.6	-8.1	-10.6
Deco.Cosmetica	-13.8	-1.0	-19.1	-12.4	-35.5	-17.6	-18.7	-6.8	-8.4	-12.5
Geuren	-14.3	-1.5	-18.6	-16.5	-44.2	-12.2	-28.7	76.5	-10.5	-17.9
Haarverzorging	4.6	6.9	3.8	16.4	-1.4	5.9	2.4	-8.6	-4.9	-3.0
Health Care	4.0	0.2	5.5	55.5	-7.0	-9.0	-4.1	-5.9	-10.0	-11.4
Lichaamsverzorging	3.1	3.1	3.1	21.3	2.7	3.9	4.4	-13.6	-11.4	-15.6
Mondverzorging	1.6	4.2	0.4	24.9	-18.1	-3.0	-3.7	-3.7	8.1	6.3
Papier	0.4	-1.9	1.4	42.4	-14.3	-9.2	-6.0	-9.4	-2.1	-8.4
Schoonmaak & Onderhoud	13.4	12.0	14.6	44.5	11.3	0.5	9.5	-4.1	8.3	26.3
Dranken Houdbaar	4.8	6.2	3.5	28.3	-8.7	-6.3	17.7	-18.9	7.9	-15.0
Kruidenierswaren	-4.2	0.3	-5.9	33.2	-25.5	-18.9	-11.8	-10.9	-6.5	-6.6
Zoetwaren & Snacks	-0.2	4.0	-2.1	13.0	-19.9	-8.0	-1.7	13.6	7.8	10.3

SALES INDEX ON CATEGORY LEVEL - DRUG

Drug

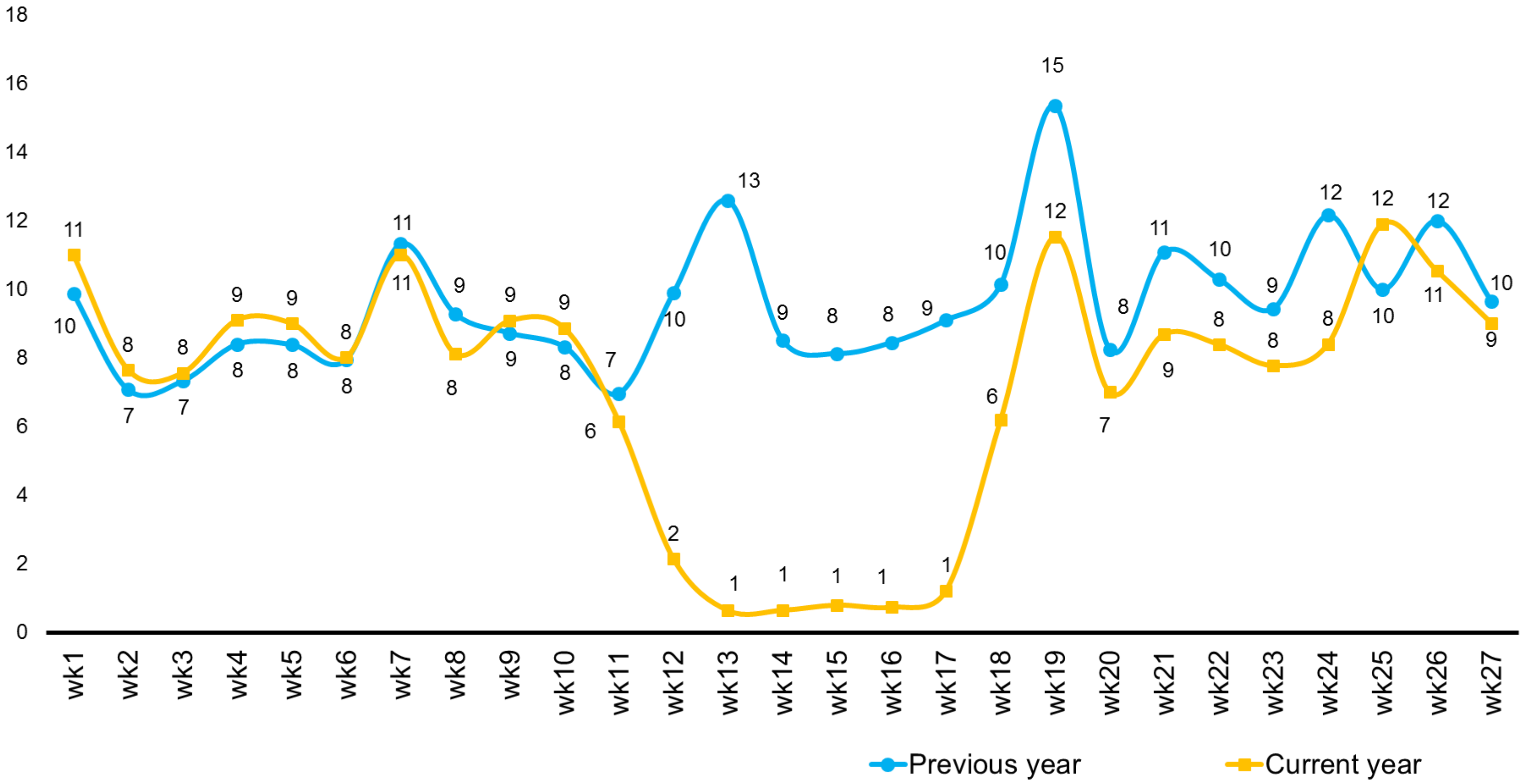
Category	Value index wk2-8 2020/2019	Value index from wk9 2020/2019	Impact in € (000) Actual minus expected	Index € sales vs PY wk2-8 20	YTD from wk 9 20	P3	P4	P5	P6	w25	w26	w27
Vit/Mineralen Suppl.	100	122	12,916	100	122	172	111	101	106	115	108	108
Toiletzeep	123	279	12,047	123	279	428	234	274	235	257	191	200
Hand/Bodyproducten	92	115	6,187	92	115	122	136	110	114	94	92	91
Haarkleurmiddelen	106	127	5,100	106	127	121	156	141	110	101	101	103
Otc Hoest Verkoudheid En Griep	94	109	4,024	94	109	169	90	83	99	86	97	86
Vochtige Doekjes	99	120	2,055	99	120	180	104	110	108	100	117	101
Diagnostica	102	320	1,446	102	320	625	245	204	197	252	250	260
Pijnstillers	107	111	1,212	107	111	211	83	80	84	92	89	91
Celstofbabyluiers	89	92	1,004	89	92	124	77	81	88	88	97	86
Huishoudreinigers	99	134	854	99	134	253	129	96	102	100	96	82
Schoonmaakhulpmiddelen	74	148	749	74	148	175	190	130	121	144	113	110
Tissues Droog	102	141	670	102	141	201	130	125	116	114	114	123
Papieren Zakdoekjes	103	135	577	103	135	275	88	94	100	89	98	89
Toiletpapier	85	97	533	85	97	158	86	69	86	71	81	78
Machinevaatwasmiddel	107	120	376	107	120	205	137	74	127	113	146	170
Schuimbadproducten	101	102	346	101	102	121	92	100	96	122	98	91
Vaatwasmiddelen	101	124	306	101	124	155	82	117	158	81	121	146
Toiletreinigers	69	169	238	69	169	70	224	165	373	154	53	56
Keukenpapier	120	128	184	120	128	168	116	106	146	96	95	85
Anti Kalk	74	132	116	74	132	84	94	133	192	190	195	214

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

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.

This artwork was created using Nielsen data.