COVID-19 CRISIS

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

Update: July 29th, 2020

This artwork was created using Nielsen data.

MESSAGE FROM OUR NEW COMMERCIAL LEADER

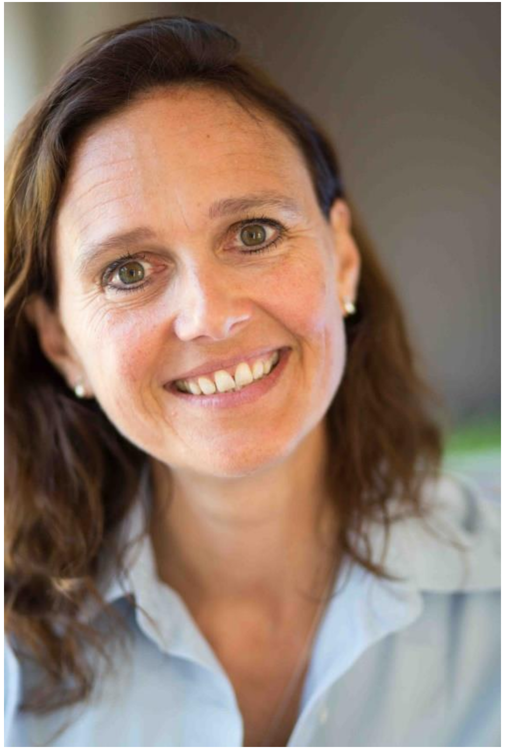
Dear Client,

As of August 1st, I have the great pleasure to introduce myself as the new leader of our Benelux and Nordic retail measurement business, succeeding Johan Vrancken, who has led our Benelux business for the past year and a half.

As I'm originally from the Netherlands, this move is one that feels like "home" to me. Over 20 years ago, prior to my international roles at Nielsen and local roles at GlaxoSmithKline and TomTom, I spent time as a Nielsen consultant in the Netherlands. I'm excited to return to the Benelux business, to evaluate what has changed and what we can make even better for you as clients.

During the past ten years, I've served Nielsen's global client teams and held the post of Managing Director of our Nielsen Austria and Switzerland business. I believe in loving what you do, and the power of connection — with my teams and with you, our clients.

I look forward to connecting with you, to hear about your needs and how we can further strengthen our relationship. In the meantime, if there's anything we can do for you, please don't hesitate to reach out.



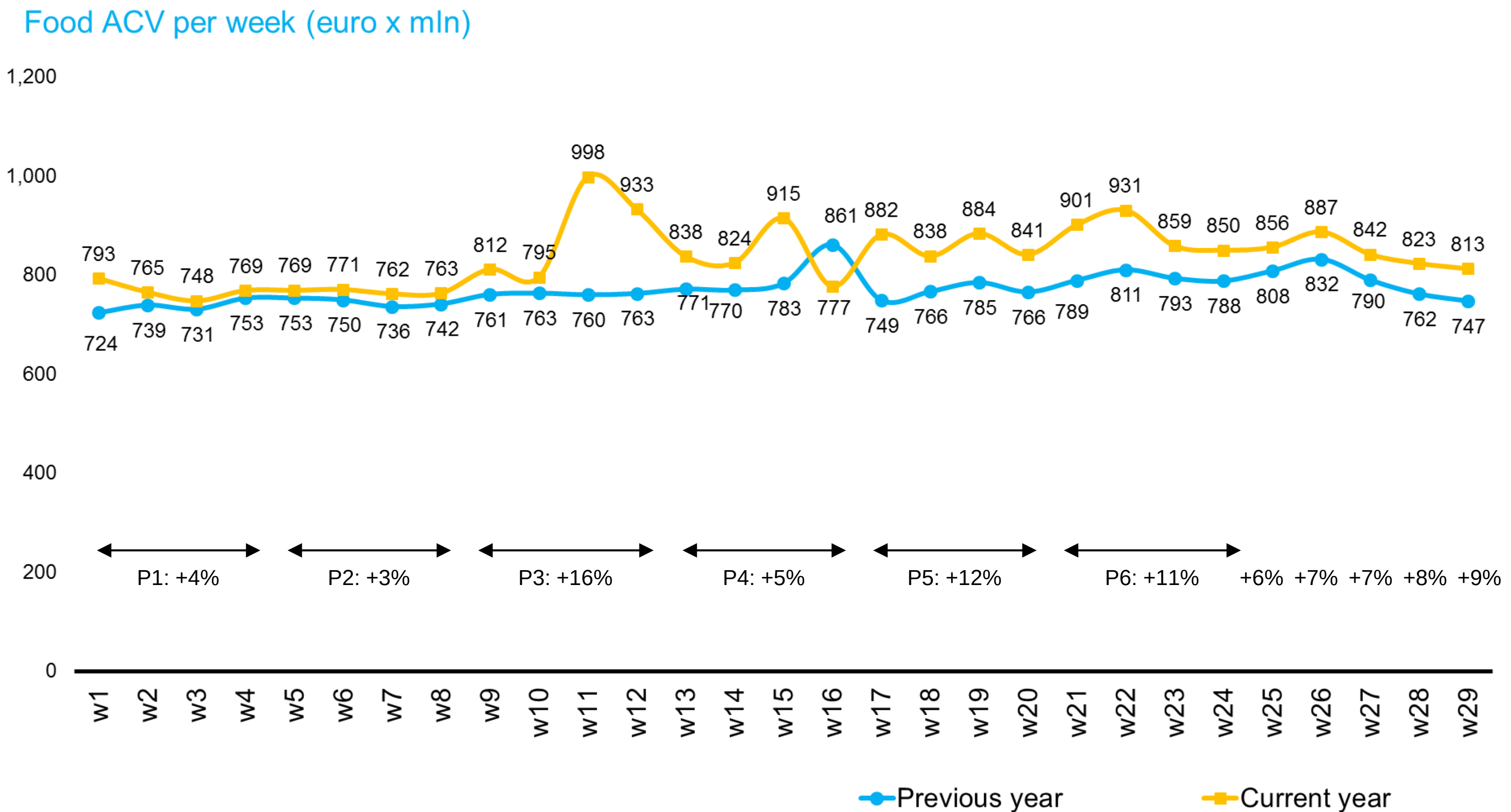
Judith Kuiper
Commercial Leader, Benelux & Nordics
Nielsen Retail Intelligence

Weekly update

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

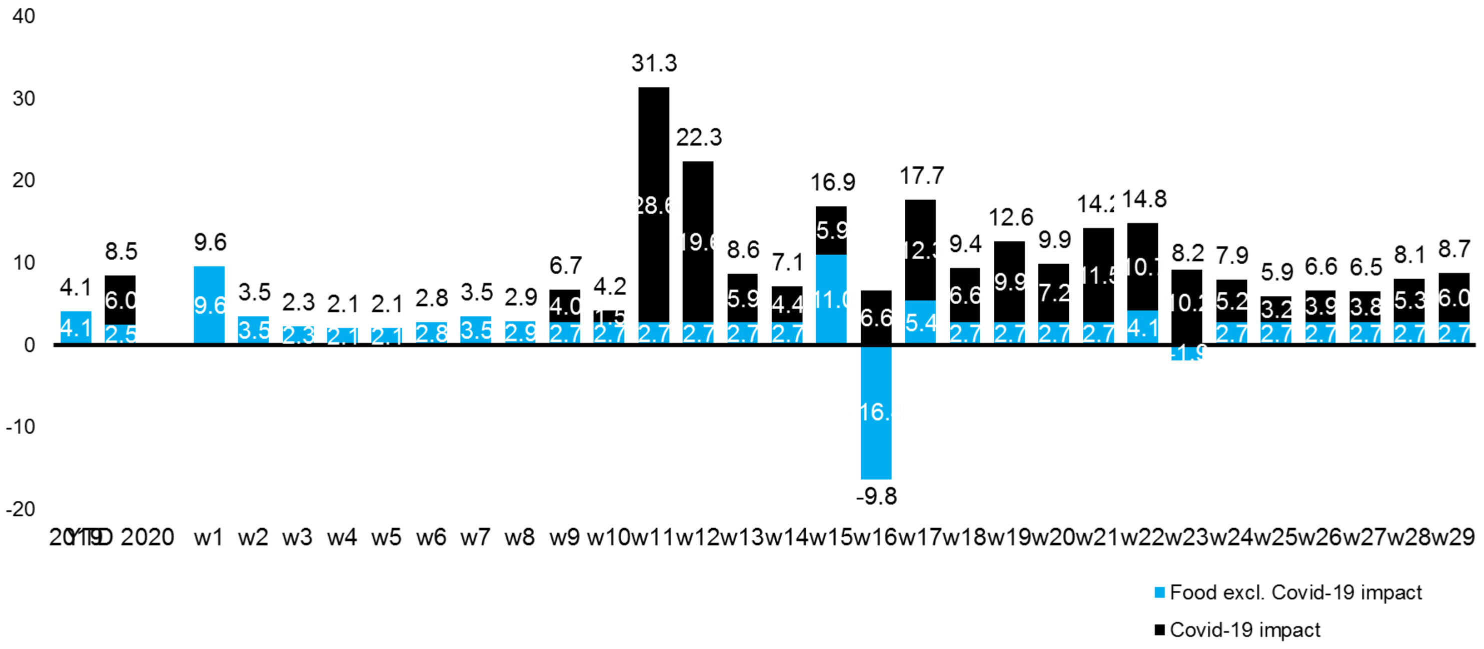
SUPERMARKETS

FOOD SALES PER WEEK



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
€ 1338M	**8%**	**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	wk 28 20	wk 29 20
Totaal Supermarkten (ACV)	8.5	2.7	10.2	16.1	5.3	12.4	11.3	5.9	6.6	6.5	8.1	8.7
Dranken Houdbaar	8.9	1.3	10.8	9.5	4.9	16.7	17.9	3.2	6.2	2.7	11.0	9.7
Kruidenierswaren	12.8	3.2	16.3	39.0	10.2	12.8	11.3	8.9	10.2	9.9	8.8	7.7
Zoetwaren & Snacks	5.8	4.1	6.1	12.0	-1.2	5.6	6.9	9.1	8.1	5.9	6.0	7.6
Diepvries	13.6	4.4	16.2	22.5	15.7	23.8	18.9	3.0	2.7	1.0	10.7	9.4
Vers	7.7	2.6	9.3	12.8	6.4	11.7	10.5	6.3	6.7	5.1	5.6	7.5
Schoonmaak & Onderhoud	9.8	2.4	13.0	31.8	13.7	9.2	10.2	3.3	-1.9	8.6	2.4	5.4
Drogmetica	10.6	2.9	13.4	54.6	10.0	4.7	3.2	-5.9	0.9	-0.8	1.5	1.0
Haarverzorging	0.4	0.8	-0.7	14.4	6.6	-2.6	-10.3	-9.5	-0.5	-5.6	-8.0	-19.5
Health Care	11.2	6.7	13.0	78.6	8.9	-10.8	-5.9	-8.9	-6.5	-7.3	-4.1	-2.7
Lichaamsverzorging	19.8	3.9	25.3	49.4	40.4	35.7	14.6	-4.7	-7.8	8.4	14.5	9.4
Mondverzorging	9.8	11.5	9.6	33.9	-6.3	8.8	2.7	-2.5	34.9	-0.5	-3.2	7.8
Papier	9.0	0.6	12.1	61.1	4.2	-1.9	2.7	-5.8	-0.1	-1.9	0.7	1.0
Rookwaren	7.5	2.7	9.0	6.9	2.8	9.7	14.4	10.2	13.1	6.8	10.0	10.9

SALES INDEX ON CATEGORY LEVEL

Ranked on estimated impact of Covid-19

Overview categories

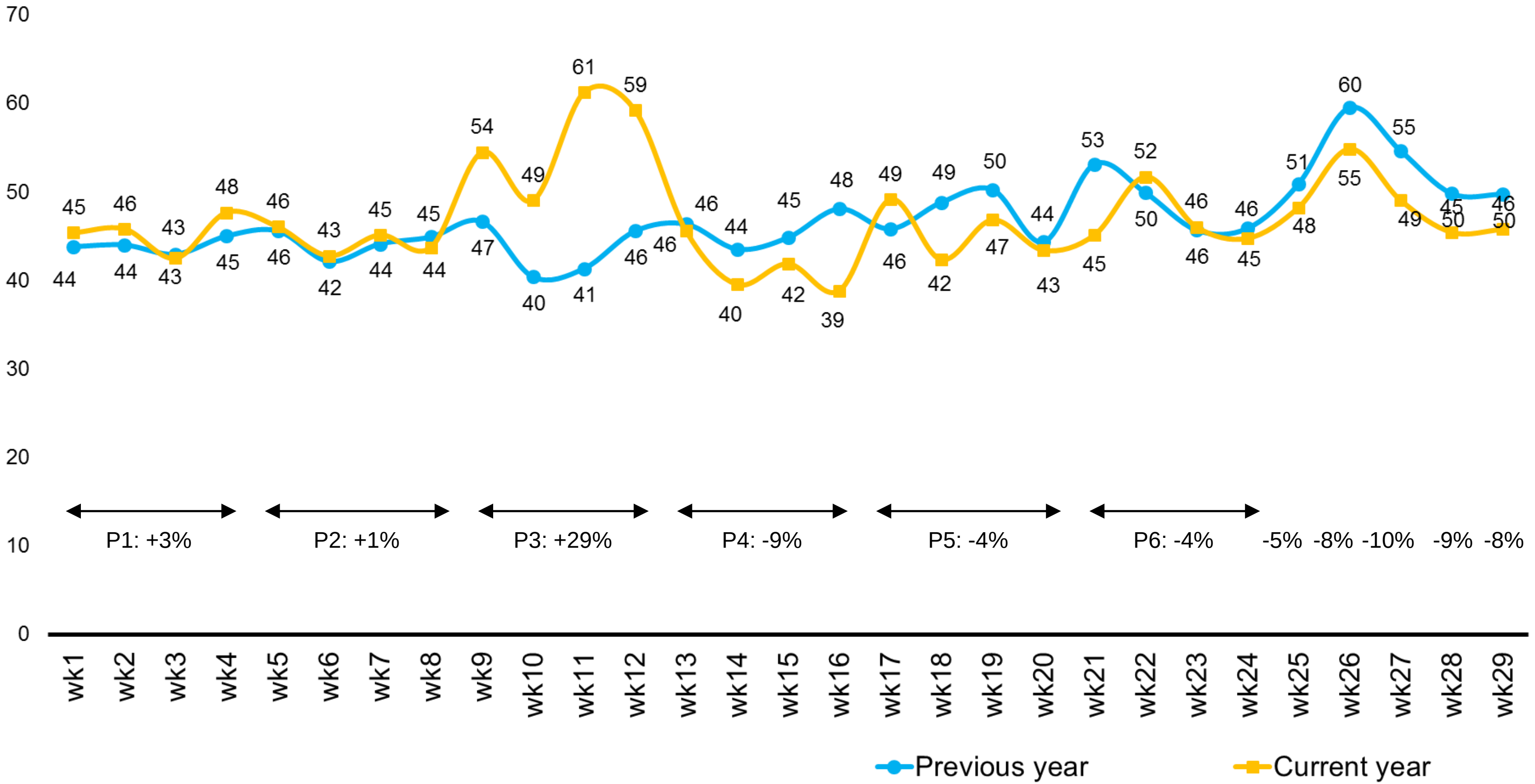
Category	Value index wk2-8 2020/2019	Value index from wk9 2020/2019	Est. Impact in € (000) Actual minus expected	Index € sales vs PY wk2-8 20	YTD from wk 9 20	P3 20	P4 20	P5 20	P6 20	w25	w26	w27	w28	w29
Vlees	100	115	137,299	100	115	120	113	118	116	103	109	108	107	112
Fruit	104	116	118,628	104	116	116	124	119	117	107	110	107	109	114
Groenten	99	112	94,546	99	112	110	112	117	113	108	110	106	107	106
Bier	102	112	63,921	102	112	101	104	124	126	105	101	97	112	111
Stille Wijnen	96	111	56,649	96	111	101	106	120	119	109	109	106	112	109
Koffie excl. oplos	104	121	48,354	104	121	121	117	123	128	102	133	114	137	111
Zuivel	102	108	40,296	102	108	109	106	110	109	107	109	106	107	107
Kaas	103	109	38,191	103	109	113	104	111	110	109	109	107	105	106
Shag	100	112	30,625	100	112	107	103	112	120	117	120	112	114	114
Vleeswaren	104	108	24,163	104	108	112	103	110	108	111	110	106	107	108
Sigaretten	104	108	22,341	104	108	106	102	109	112	108	111	105	109	110
Dv Ijs	107	117	22,102	107	117	106	127	155	127	85	91	78	106	101
Pindas Noten+Aanv	103	115	20,411	103	115	111	110	123	117	116	120	109	112	114
Brood Afbak	105	128	20,069	105	128	143	118	127	132	130	124	119	124	121
Toiletzeep	104	310	19,936	104	310	432	321	321	287	251	248	225	225	180
Dv Snacks	105	123	18,858	105	123	125	125	126	119	120	123	114	126	113
Smaakmakers	104	130	17,968	104	130	127	131	141	131	127	129	123	116	117
Sauzen	103	116	17,700	103	116	118	114	124	121	106	107	104	110	108
Groentenconserven	104	124	16,946	104	124	184	110	103	113	110	112	114	109	118
Geelvet	102	111	16,464	102	111	122	106	115	111	109	99	100	106	105
Huishoudreinigers	111	142	16,446	111	142	171	154	137	139	126	103	118	118	121

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	wk 28 20	wk 29 20
Drogmetica	0.3	1.6	-0.3	28.8	-9.3	-4.0	-3.6	-5.3	-7.8	-10.2	-8.8	-8.0
Deco.Cosmetica	-13.7	-1.0	-18.4	-12.4	-35.5	-17.6	-18.7	-6.8	-8.3	-12.5	-12.8	-9.9
Geuren	-13.2	-1.2	-16.9	-16.2	-43.6	-11.1	-27.7	81.2	-6.0	-11.7	-12.5	-16.6
Haarverzorging	3.8	6.9	2.8	16.4	-1.5	5.9	2.4	-8.6	-4.9	-3.0	-5.3	-6.9
Health Care	3.2	0.2	4.3	55.5	-7.0	-9.0	-4.1	-5.8	-9.9	-11.3	-9.5	-5.0
Lichaamsverzorging	2.1	3.1	1.7	21.3	2.7	4.1	4.7	-13.4	-11.1	-15.4	-12.1	-11.2
Mondverzorging	1.7	4.2	0.7	24.9	-18.1	-3.0	-3.6	-3.6	8.1	6.3	7.2	-1.8
Papier	-0.2	-1.9	0.4	42.4	-14.3	-9.2	-6.0	-9.4	-2.0	-8.4	-8.8	-8.4
Schoonmaak & Onderhoud	11.7	12.0	12.1	44.5	11.3	0.6	9.6	-4.0	8.4	26.5	0.8	-18.8
Dranken Houdbaar	4.0	6.2	2.6	28.3	-8.7	-6.3	17.7	-18.9	7.9	-15.0	2.1	-13.0
Kruidenierswaren	-4.7	0.3	-6.5	33.2	-25.5	-18.9	-11.8	-10.9	-6.5	-6.6	-8.3	-14.1
Zoetwaren & Snacks	0.1	4.0	-1.5	13.0	-19.9	-8.0	-1.7	13.6	7.8	10.7	6.1	2.1

SALES INDEX ON CATEGORY LEVEL - DRUG

Drug

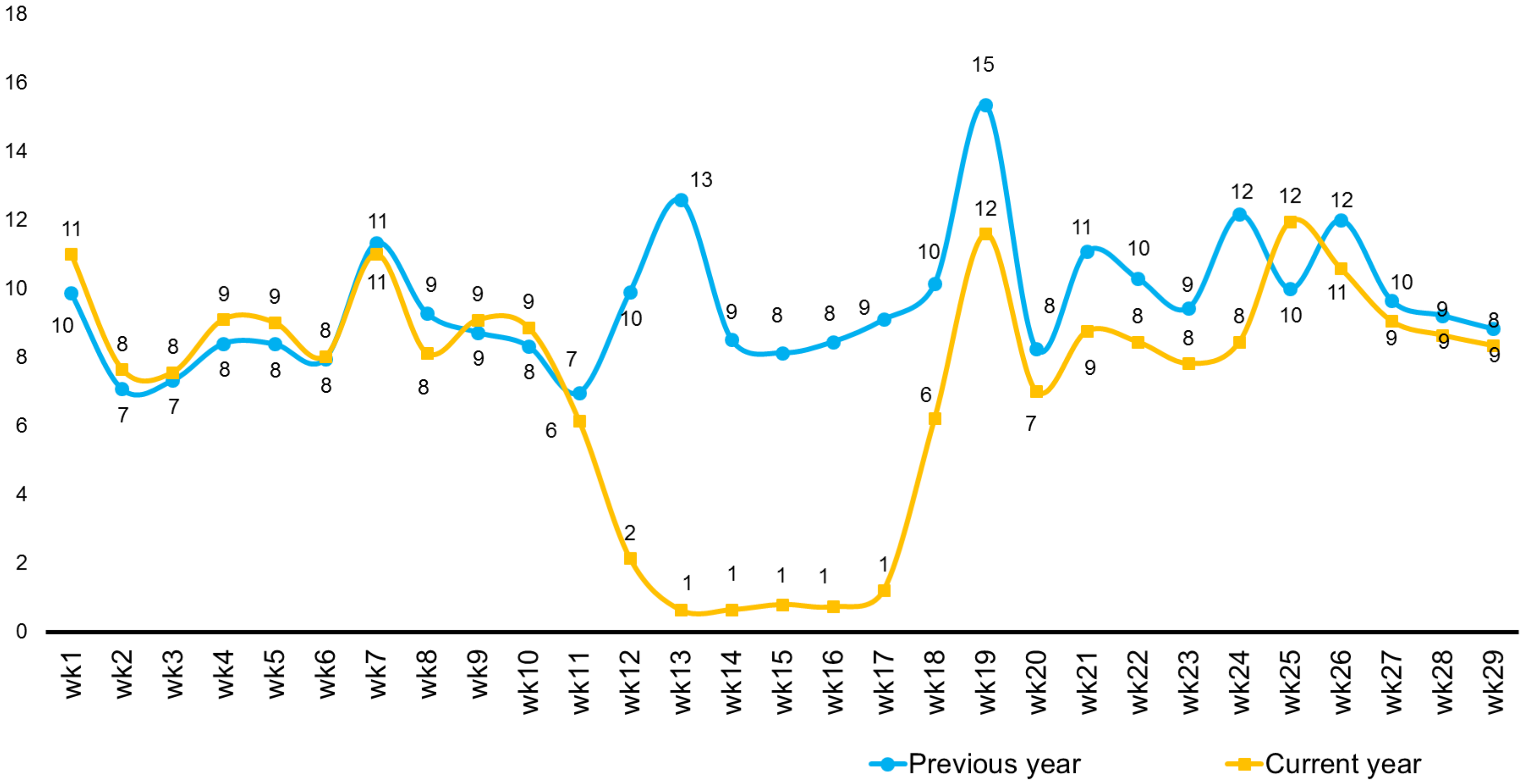
Category	Value index wk2-8 2020/2019	Value index from wk9 2020/2019	Impact in € (000) Actual minus expected	Index € sales vs PY: wk2-8 20	YTD from wk 9 20	P3	P4	P5	P6	w25	w26	w27	w28	w29
Vit/Mineralen Suppl.	100	121	13,933	100	121	172	111	101	106	115	108	108	111	124
Toiletzeep	123	270	12,739	123	270	428	235	276	242	260	193	202	166	177
Hand/Bodyproducten	92	113	6,212	92	113	122	136	110	114	94	92	91	94	96
Haarkleurmiddelen	106	125	5,012	106	125	121	156	141	110	101	101	103	99	98
Otc Hoest Verkoudheid En Griep	94	107	3,691	94	107	169	90	83	99	86	97	86	88	92
Vochtige Doekjes	99	115	1,841	99	115	180	104	110	108	100	117	101	69	98
Diagnostica	102	307	1,507	102	307	625	245	204	197	252	250	260	195	175
Celstofbabyluiers	89	92	965	89	92	124	77	81	88	88	97	86	88	87
Huishoudreinigers	99	130	860	99	130	253	129	96	102	100	96	82	95	109
Schoonmaakhulpmiddelen	74	138	714	74	138	175	190	130	121	144	113	110	93	58
Tissues Droog	102	136	668	102	136	201	130	125	116	114	114	123	111	89
Papieren Zakdoekjes	103	131	544	103	131	275	88	94	100	89	98	89	84	86
Toiletpapier	85	95	463	85	95	158	86	69	86	71	81	78	85	68
Vaatwasmiddelen	101	130	386	101	130	155	82	117	158	81	121	146	338	123
Pijnstillers	107	108	382	107	108	211	83	80	84	92	89	91	88	86
Machinevaatwasmiddel	107	118	308	107	118	205	137	74	127	113	146	170	130	72
Opzettandenborstels	114	114	267	114	114	140	77	94	123	107	150	125	171	118
Toiletreinigers	69	161	242	69	161	70	224	165	373	154	54	59	66	101
Keukenpapier	120	127	192	120	127	168	116	106	146	96	95	85	117	122
Anti Kalk	74	137	138	74	137	84	94	133	192	190	195	214	209	173

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)



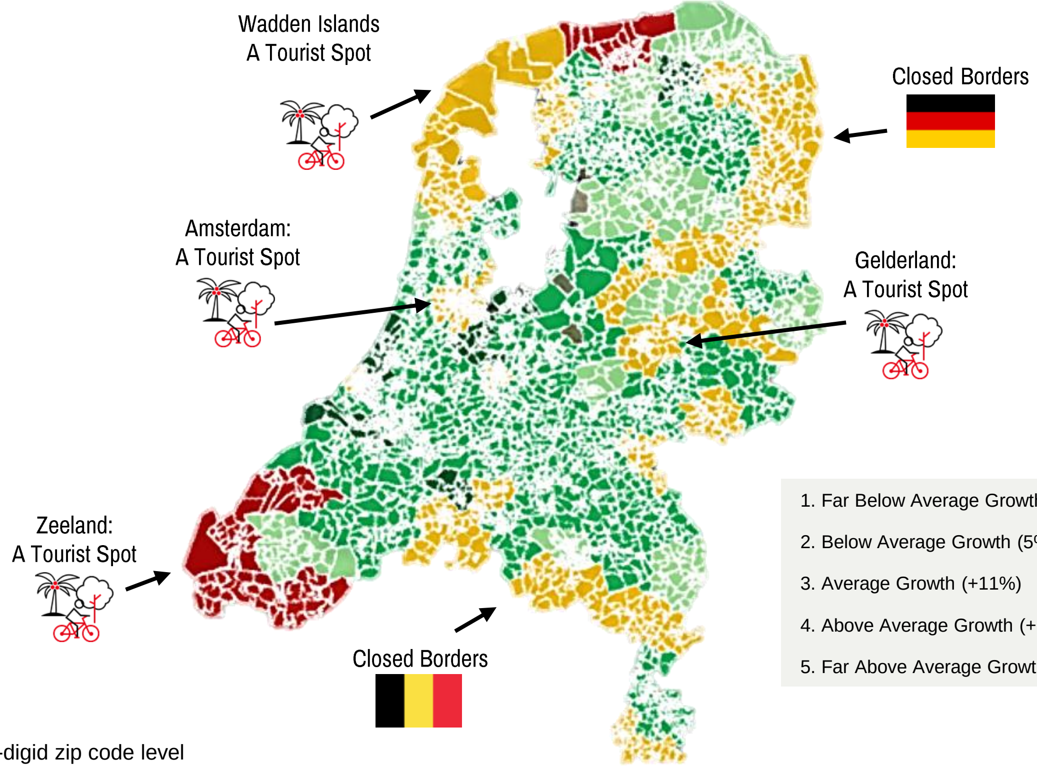
SLOWER SALES GROWTH AT THE BORDER DURING COVID-19

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

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.