COVID-19 CRISIS

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

Update: June 30th, 2020

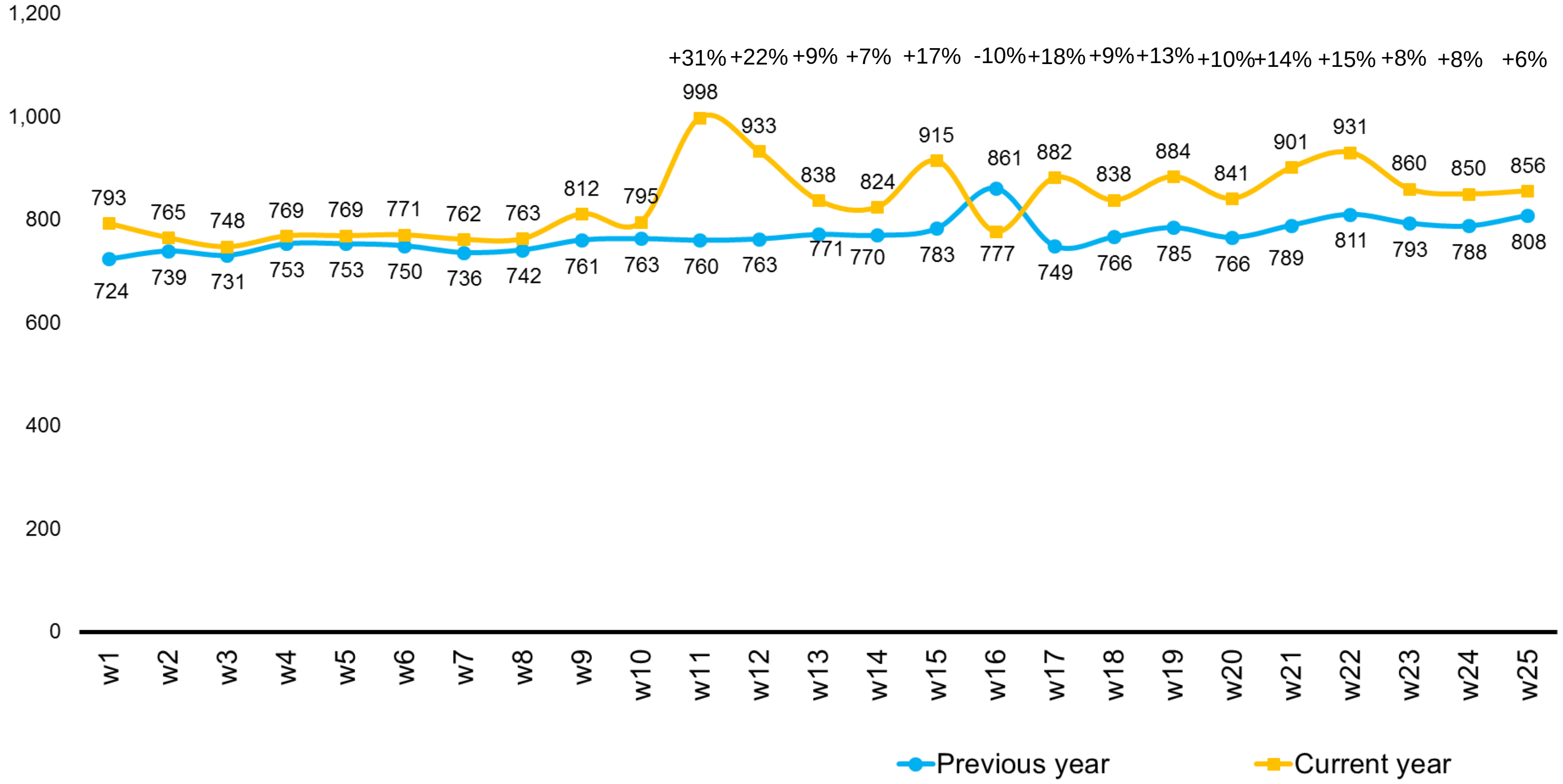
Weekly update

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

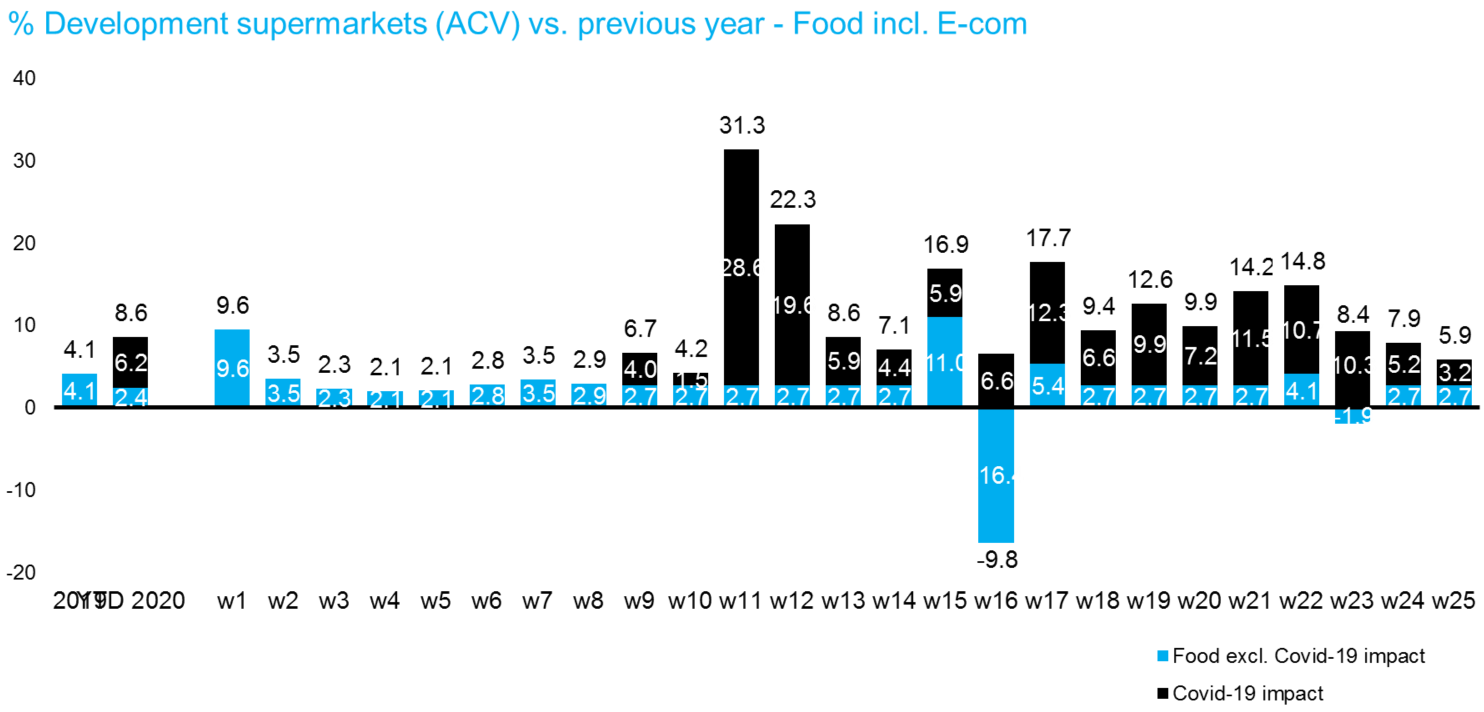
SUPERMARKETS

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
€ 1192M	**8.8%**	**6.2%**

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	wk 09 20	wk 10 20	wk 11 20	wk 12 20	wk 13 20	wk 14 20	wk 15 20	wk 16 20	wk 17 20	wk 18 20	wk 19 20	wk 20 20	wk 21 20	wk 22 20	wk 23 20	wk 24 20	wk 25 20
Totaal Supermarkten (ACV)	8.6	2.7	10.9	6.7	4.2	31.3	22.3	8.6	7.1	16.9	-9.8	17.7	9.4	12.6	9.9	14.2	14.8	8.4	7.9	5.9
Dranken Houdbaar	9.2	1.3	11.8	0.5	-0.6	24.0	15.0	4.6	7.0	21.2	-10.0	19.6	13.5	22.3	11.9	27.9	21.2	10.1	12.2	3.0
Kruidenierswaren	13.3	3.2	17.8	20.7	9.1	71.8	54.0	20.3	12.4	12.5	-3.9	22.2	7.7	9.4	12.5	10.7	14.7	8.3	10.9	8.6
Zoetwaren & Snacks	5.5	4.1	5.8	6.9	5.9	23.1	11.7	3.9	5.7	3.1	-17.1	12.5	3.1	1.6	5.4	8.4	9.7	4.3	4.1	8.5
Diepvries	15.0	4.4	18.9	6.1	0.2	45.1	38.5	15.1	15.2	33.5	1.2	33.5	19.2	25.8	16.9	21.6	18.9	16.8	17.1	2.5
Vers	7.9	2.7	10.0	5.1	3.6	24.8	17.9	8.8	7.8	19.8	-9.3	19.4	8.2	10.6	8.4	12.6	14.5	6.2	7.7	5.8
Schoonmaak & Onderhoud	11.0	2.4	15.6	26.1	1.7	46.5	56.3	30.2	10.6	-1.9	17.6	9.8	5.0	14.0	11.4	13.9	8.8	10.0	7.9	3.0
Drogmetica	11.9	2.8	16.1	26.1	25.4	82.7	83.9	34.3	2.7	-0.6	2.7	-6.9	7.1	4.1	13.0	-1.4	3.5	7.4	0.5	-6.3
Haarverzorging	2.0	0.8	1.4	0.2	-10.6	31.7	39.1	11.4	2.0	-7.7	25.4	-9.9	-11.2	17.7	-3.4	-24.3	-8.2	6.6	-13.8	-9.5
Health Care	13.6	6.7	17.1	31.6	33.9	130.4	123.7	33.7	8.2	-0.9	-5.1	-12.2	-10.4	-11.0	-9.4	-8.9	-4.0	-2.0	-10.2	-9.7
Lichaamsverzorging	21.2	3.9	28.8	29.3	40.1	43.1	85.2	63.7	33.2	49.6	12.3	27.8	26.6	39.0	34.8	20.6	1.9	23.0	3.3	-6.8
Mondverzorging	9.6	11.5	9.2	41.9	77.1	-5.8	46.3	17.1	-13.7	-30.7	14.4	-7.9	44.3	-17.3	18.6	-11.6	9.8	-2.5	16.5	-2.6
Papier	10.5	0.5	15.0	25.9	16.3	118.8	87.7	32.0	-4.4	-7.6	-3.5	-16.1	0.7	-2.7	11.9	-2.7	6.0	5.6	0.9	-5.6
Rookwaren	6.9	2.7	8.5	-1.9	2.7	15.9	11.4	1.5	3.5	6.2	0.1	7.0	9.4	14.7	7.9	14.1	14.4	13.2	14.4	9.5

SALES INDEX ON CATEGORY LEVEL

Ranked on estimated impact of Covid-19

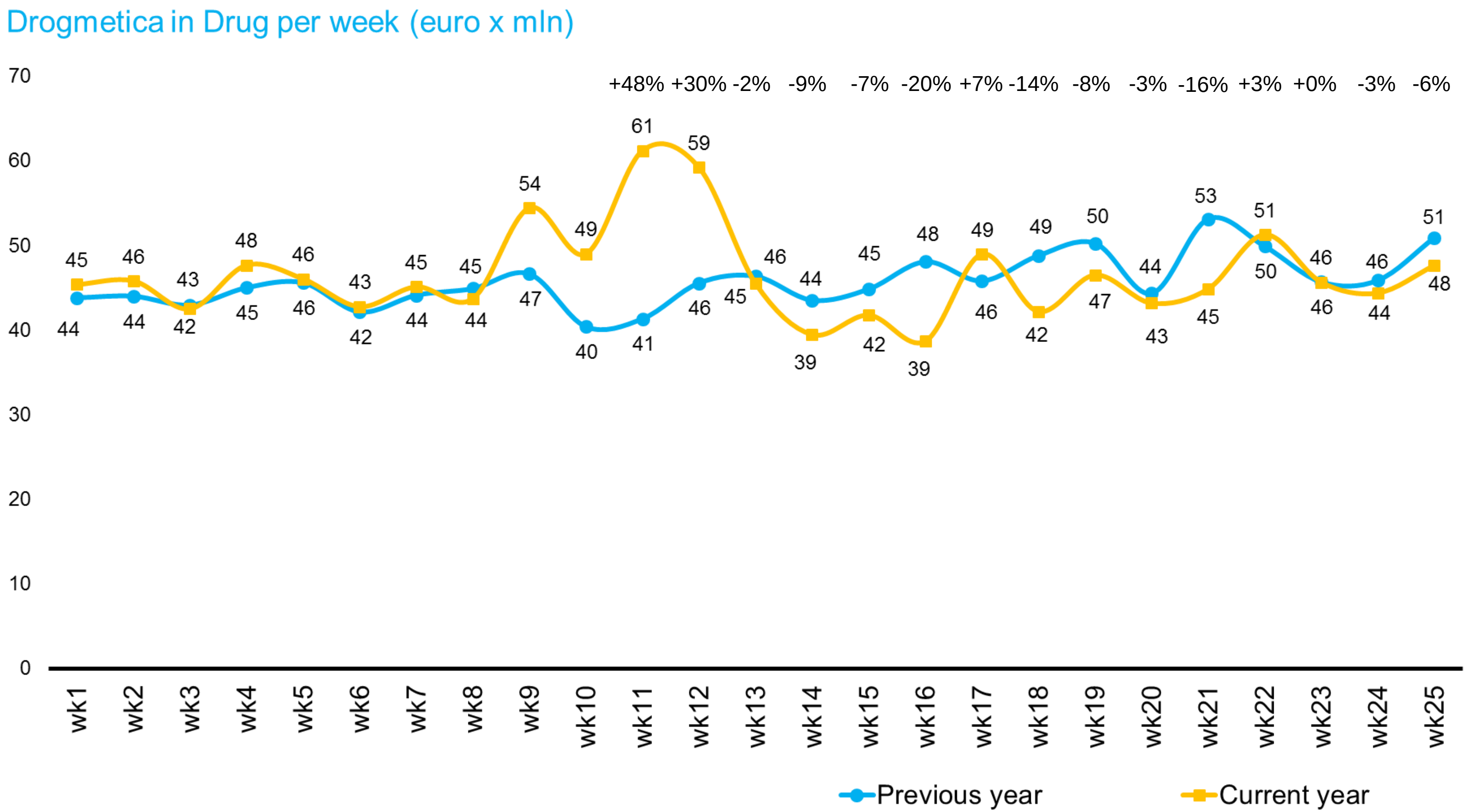
Overview categories

				Index € sales vs PY																		
Category	Value index wk2-8 2020/2019	Value index from wk9 2020/2019	Est. Impact in € (000) Actual minus expected	wk2-8 20	YTD from wk 9 20	w9	w10	w11	w12	w13	w14	w15	w16	w17	w18	w19	w20	w21	w22	w23	w24	w25
Vlees	100	116	124,013	100	116	108	103	135	136	116	114	135	93	129	110	123	112	126	122	107	112	104
Fruit	104	117	101,648	104	117	107	106	126	126	126	122	130	117	126	119	119	110	114	123	115	110	105
Groenten	99	113	82,959	99	113	102	100	124	116	114	111	119	104	128	114	113	113	115	115	110	111	107
Bier	102	114	60,346	102	114	90	95	114	106	96	107	137	86	126	120	137	113	149	125	113	119	105
Stille Wijnen	96	112	47,748	96	112	100	93	101	110	100	108	134	89	131	118	119	112	135	125	104	112	109
Koffie excl. oplos	104	121	38,821	104	121	99	101	144	143	134	119	108	107	132	113	126	125	128	141	114	129	102
Zuivel	102	109	34,601	102	109	104	104	118	110	106	109	107	104	120	108	107	108	107	114	107	108	107
Kaas	103	109	33,189	103	109	107	102	126	115	107	107	113	88	120	107	108	109	113	113	106	107	109
Dv Ijs	107	126	26,994	107	126	102	105	114	103	120	125	210	84	170	139	185	129	134	127	122	125	85
Shag	100	111	22,487	100	111	99	100	115	113	103	106	103	101	108	110	116	114	119	122	120	117	116
Vleeswaren	104	108	20,242	104	108	107	104	123	113	107	105	116	87	117	107	106	109	108	110	106	107	111
Sauzen	103	118	17,052	103	118	104	106	130	132	119	121	147	82	134	119	126	116	136	131	101	117	105
Brood Afbak	105	128	17,035	105	128	104	106	202	166	144	157	182	50	131	125	132	118	152	133	116	120	128
Pindas Noten+Aanv	103	115	16,853	103	115	106	103	126	108	111	115	121	95	129	119	123	120	120	123	113	112	116
Geelvet	102	113	16,755	102	113	107	101	140	142	121	103	123	80	127	109	109	117	115	110	105	115	109
Sigaretten	104	107	16,409	104	107	97	103	116	110	100	102	108	99	106	109	114	105	112	111	111	114	107
Dv Snacks	105	123	15,970	105	123	110	103	148	142	123	128	124	125	133	127	121	122	130	115	116	113	119
Toiletzeep	104	312	15,932	104	312	341	336	482	544	379	302	278	251	280	282	289	292	315	252	275	203	229
Huishoudreinigers	111	149	15,885	111	149	140	131	228	189	183	147	145	140	145	133	141	128	146	140	126	145	126
Smaakmakers	104	132	15,825	104	132	120	112	140	137	135	149	130	110	153	139	132	138	135	130	126	129	126

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

	YTD 2020	wk2-8 2020	Cum from wk9 2020	wk 09 20	wk 10 20	wk 11 20	wk 12 20	wk 13 20	wk 14 20	wk 15 20	wk 16 20	wk 17 20	wk 18 20	wk 19 20	wk 20 20	wk 21 20	wk 22 20	wk 23 20	wk 24 20	wk 25 20
Drogmetica	1.7	1.6	1.6	16.8	21.3	48.1	29.9	-1.9	-9.3	-6.9	-19.5	6.9	-13.6	-7.5	-2.6	-15.6	2.8	0.0	-3.3	-6.4
Deco.Cosmetica	-14.2	-1.0	-20.2	-0.9	5.3	-15.1	-36.5	-34.5	-38.2	-32.2	-36.7	-10.0	-27.1	-20.6	-11.9	-29.6	-18.2	-19.2	-5.4	-7.0
Geuren	-14.5	-1.5	-19.4	-10.4	-1.2	-15.6	-38.2	-52.2	-41.9	-38.4	-43.0	-8.6	-11.3	-10.9	-22.6	-31.8	-5.7	-14.8	-47.3	74.8
Haarverzorging	5.3	6.9	4.7	14.6	17.7	21.8	12.7	6.9	-1.7	-8.0	-3.4	18.6	0.4	-2.4	7.3	-13.8	7.2	9.5	9.6	-8.8
Health Care	5.1	0.2	7.5	17.8	26.6	97.0	84.3	7.6	-9.1	-9.2	-17.8	-1.2	-16.9	-11.4	-6.7	-15.2	3.9	-5.9	-1.5	-7.2
Lichaamsverzorging	4.7	3.1	5.2	21.4	26.9	26.5	11.6	12.7	9.7	14.8	-21.4	21.5	-9.4	1.1	-1.2	-3.3	5.8	10.0	2.2	-14.8
Mondverzorging	1.2	4.2	-0.5	24.3	18.2	35.9	20.7	-13.6	-20.0	-22.7	-16.2	1.4	-14.0	-9.3	12.9	-31.0	14.8	6.0	5.7	-3.7
Papier	0.8	-1.9	2.2	28.3	21.1	80.5	39.5	-14.5	-15.8	-14.6	-12.1	-0.8	-20.5	-12.8	-1.1	-18.9	-2.4	-0.2	-2.9	-9.7
Schoonmaak & Onderhoud	12.9	12.0	14.1	41.8	22.5	66.1	50.4	9.9	8.3	11.1	16.5	9.4	-7.6	-5.6	6.0	-8.3	11.4	25.6	12.1	-4.3
Dranken Houdbaar	5.6	6.2	4.5	36.3	48.6	29.9	2.1	-19.6	2.1	22.4	-29.0	41.1	-30.7	-35.4	8.8	-9.4	5.2	49.0	26.3	-19.3
Kruidenierswaren	-4.1	0.3	-6.0	20.0	6.6	67.7	36.8	-15.2	-26.2	-34.0	-26.6	-17.3	-17.3	-23.5	-18.5	-27.1	-8.5	-8.5	-2.0	-11.4
Zoetwaren & Snacks	-1.5	4.0	-4.2	13.7	14.6	25.3	-1.5	-16.7	-18.0	-16.2	-32.7	6.1	-20.0	-13.5	-5.6	-11.5	5.8	1.2	-5.6	11.0

SALES INDEX ON CATEGORY LEVEL - DRUG

Drug

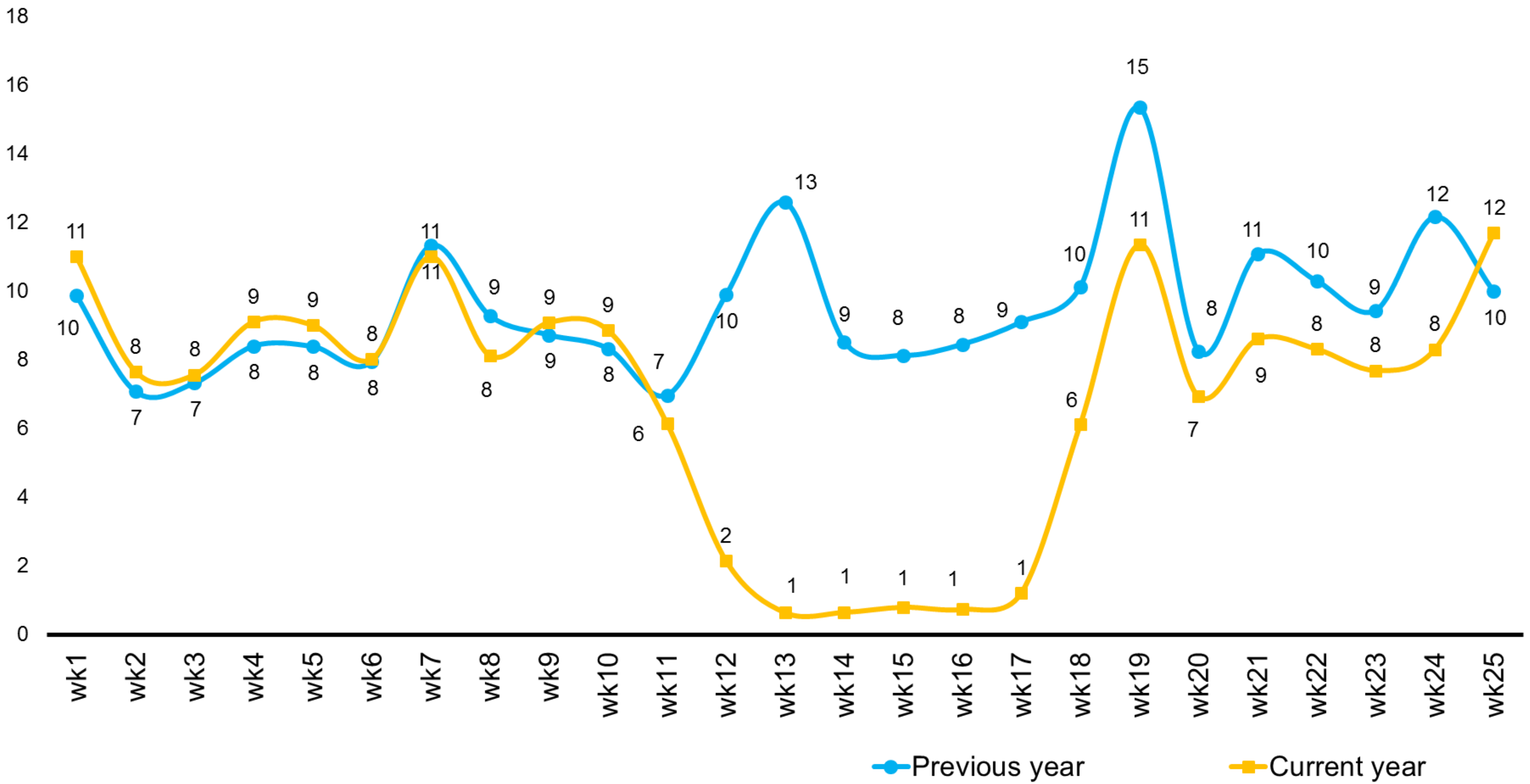
				Index € sales vs PY																		
Category	Value index wk2-8 2020/2019	Value index from wk9 2020/2019	Impact in € (000) Actual minus expected	wk2-8 20	YTD from wk 9 20	w9	w10	w11	w12	w13	w14	w15	w16	w17	w18	w19	wk 20	wk 21	wk 22	wk 23	wk 24	wk 25
Vit/Mineralen Suppl.	100	123	12,412	100	123	129	132	207	215	126	111	103	101	118	98	90	104	91	116	103	116	114
Toiletzeep	123	284	10,891	123	284	462	383	482	379	221	241	204	230	293	208	212	359	208	272	223	235	254
Hand/Bodyproducten	92	118	6,156	92	118	108	122	132	128	174	149	117	105	142	104	103	98	97	125	113	113	91
Haarkleurmiddelen	106	131	5,123	106	131	107	113	122	137	183	165	129	147	176	136	122	135	93	113	122	120	101
Otc Hoest Verkoudheid En Griep	94	110	3,974	94	110	105	129	244	227	122	83	93	68	90	73	88	79	80	113	102	88	81
Vochtige Doekjes	99	121	1,929	99	121	155	152	227	187	95	129	91	103	143	82	108	117	85	115	116	124	100
Pijnstillers	107	113	1,902	107	113	134	147	318	253	103	84	74	70	84	74	79	84	73	86	85	93	92
Diagnostica	102	327	1,344	102	327	256	435	910	950	148	148	406	296	243	193	187	198	145	163	212	273	252
Celstofbabyluiers	89	92	916	89	92	125	100	155	114	74	71	84	79	90	70	76	91	83	89	93	89	88
Huishoudreinigers	99	140	888	99	140	156	156	311	427	160	137	134	90	94	81	99	113	101	132	98	83	100
Schoonmaakhulpmiddelen	74	153	713	74	153	143	162	193	208	125	179	286	220	167	135	113	105	103	145	116	123	144
Tissues Droog	102	143	640	102	143	149	145	266	245	163	137	104	120	142	109	114	137	107	121	118	119	114
Papieren Zakdoekjes	103	139	595	103	139	200	211	386	314	112	80	63	97	103	82	89	102	78	123	101	98	89
Toiletpapier	85	98	520	85	98	136	130	358	106	113	83	74	74	46	69	83	93	78	41	151	91	69
Voetverzorging	100	100	308	100	100	103	107	111	85	86	94	113	100	121	92	113	117	88	100	94	96	88
Schuimbadproducten	101	102	285	101	102	124	118	130	114	101	96	77	96	127	96	86	100	90	111	99	82	118
Vaatwasmiddelen	101	123	265	101	123	96	143	362	110	105	63	54	99	238	64	51	270	196	336	101	64	81
Keukenpapier	120	132	212	120	132	140	148	229	141	99	99	102	156	122	79	101	121	194	154	119	125	96
Machinevaatwasmiddel	107	117	203	107	117	170	347	169	181	191	80	133	182	43	90	92	86	54	177	219	117	113
Toiletreinigers	69	165	197	69	165	27	71	135	140	89	506	300	129	161	136	184	193	453	195	158	137	126

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.