



COVID-19 CRISIS

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

Update: May 19th, 2020

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COVID-19

TRACKING THE IMPACT ON FMCG AND RETAIL

Weekly update

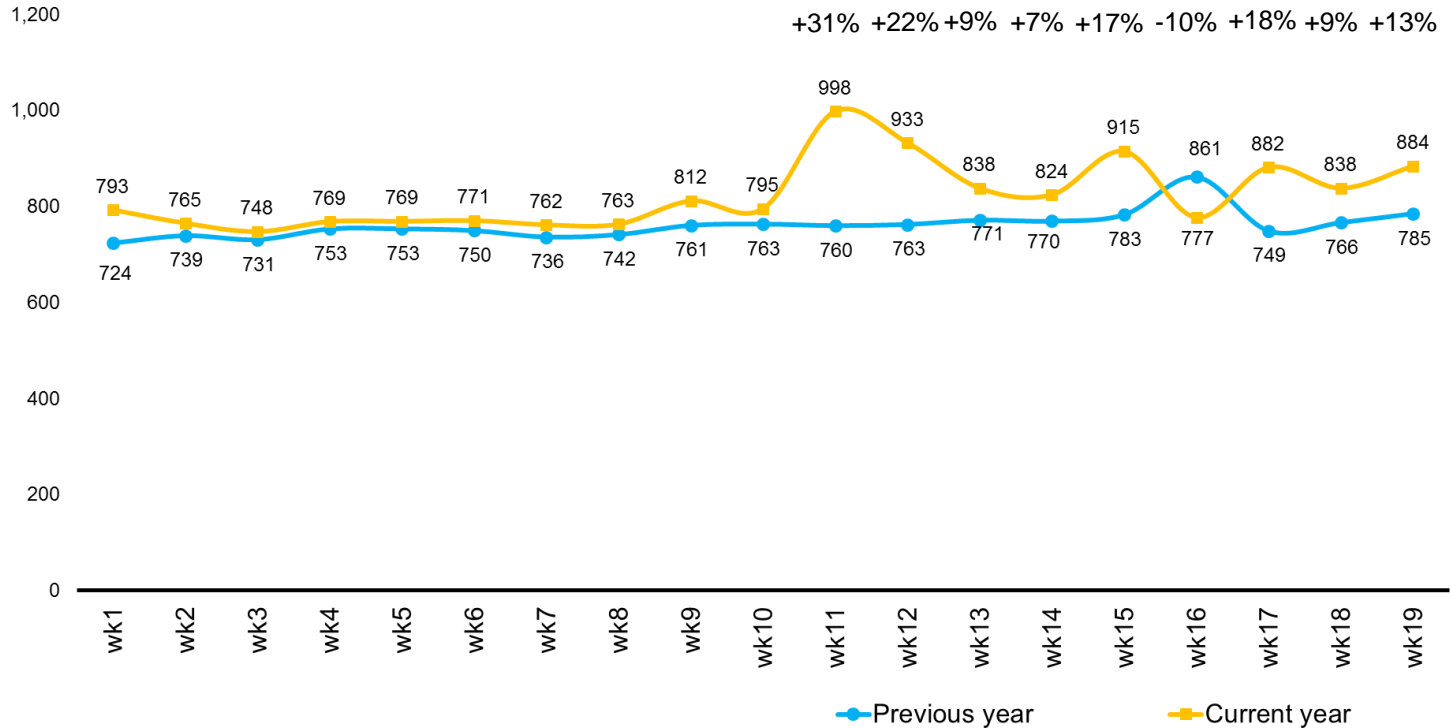
- Impact of COVID-19 on Supermarket Channel
- Drug Channel
- Perfumery Channel



SUPERMARKETS

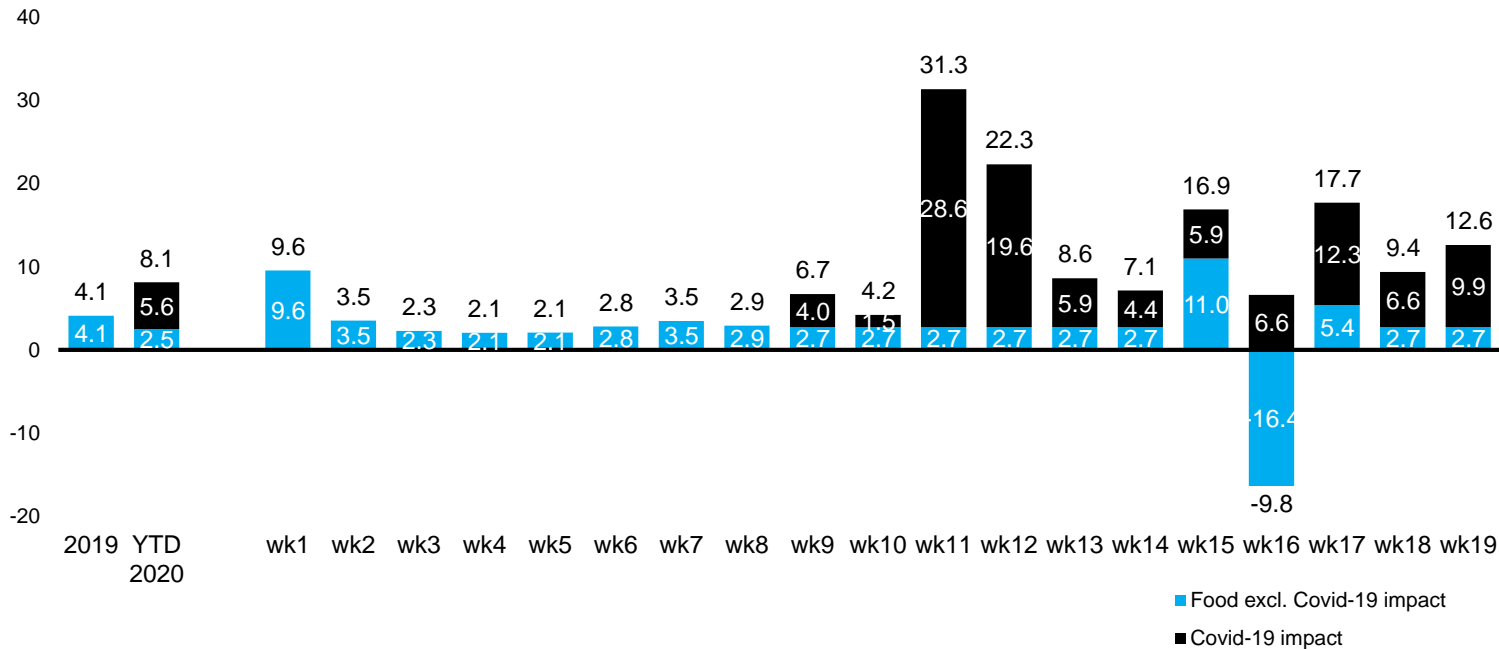
SALES STABILIZE AT A NEW NORMAL

Food ACV per week (euro x mln)



€ 811M+ SALES DUE TO COVID-19

% Development supermarkets (ACV) vs. previous year - Food incl. E-com



Extra growth from wk9
€ 811M

Extra % growth from wk 9
9.3%

Impact on % YTD growth
5.6%

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	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
Totaal Supermarkten (ACV)	8.1	2.7	11.3	6.7	4.2	31.3	22.3	8.6	7.1	16.9	-9.8	17.7	9.4	12.6
Dranken Houdbaar	7.1	1.3	9.9	0.5	-0.7	23.9	14.9	4.5	6.8	20.8	-10.4	18.8	12.7	20.7
Kruidenierswaren	13.9	3.2	21.2	20.7	9.1	71.8	53.8	20.1	12.2	12.2	-4.2	21.7	7.3	8.7
Zoetwaren & Snacks	4.8	4.1	4.8	6.8	5.5	22.7	11.4	3.5	5.2	2.6	-17.5	11.3	2.3	0.6
Diepvries	14.6	4.4	20.7	6.1	0.2	45.1	38.4	14.8	15.0	33.0	0.8	32.9	18.8	24.9
Vers	7.2	2.6	9.8	5.1	3.7	24.8	17.8	8.5	7.3	19.1	-9.8	18.3	7.0	9.2
Schoonmaak & Onderhoud	11.4	2.4	18.9	26.1	1.7	46.3	56.0	29.8	10.2	-2.2	16.9	9.2	4.4	13.3
Drogmetica	14.3	2.8	22.6	26.1	25.3	82.5	83.3	33.5	1.6	-2.3	1.2	-8.7	4.8	1.4
Haarverzorging	5.6	0.8	7.3	0.2	-10.7	31.7	39.0	11.4	1.8	-7.8	25.2	-10.0	-11.3	17.3
Health Care	19.4	6.6	29.6	31.3	33.5	129.9	123.1	32.5	7.0	-1.6	-5.6	-12.4	-10.6	-11.3
Lichaamsverzorging	22.5	3.9	35.9	29.3	40.1	42.0	82.6	61.4	31.1	44.2	9.0	21.1	17.3	27.3
Mondverzorging	11.2	11.5	11.8	41.9	77.1	-5.8	46.3	17.1	-13.7	-30.7	14.4	-7.9	44.0	-17.6
Papier	12.5	0.5	21.2	25.9	16.3	118.8	87.5	31.5	-5.7	-9.1	-5.0	-17.4	-0.5	-3.7
Rookwaren	2.8	2.2	2.8	-2.7	1.7	14.8	10.4	0.6	2.6	5.3	-0.8	4.6	0.5	-6.0

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	w9	w10	w11	w12	w13	w14	w15	w16	w17	w18	w19
Vlees	101	119	93,252	101	119	108	104	136	137	117	115	137	94	131	112	126
Fruit	104	119	67,937	104	119	107	106	126	126	125	121	129	116	122	115	115
Groenten	99	111	46,958	99	111	102	100	124	116	113	109	117	102	125	110	109
Stille Wijnen	96	108	24,065	96	108	100	93	101	110	100	107	133	88	130	117	117
Koffie excl. oplos	104	120	23,740	104	120	99	101	144	142	134	119	108	106	132	113	125
Bier	102	110	23,667	102	110	90	95	114	106	96	107	136	85	125	119	135
Zuivel	102	109	22,531	102	109	104	104	118	110	106	109	107	104	120	108	107
Kaas	103	109	20,131	103	109	107	102	126	115	107	107	113	88	119	106	107
Dv ljs	107	133	18,403	107	133	102	105	114	103	120	125	208	83	168	137	182
Toiletpapier	104	125	14,491	104	125	131	134	255	186	139	91	88	92	79	97	90
Groentenconserven	104	135	13,836	104	135	154	112	257	220	134	110	96	99	113	95	97
Huishoudreinigers	111	155	11,951	111	155	139	131	228	188	182	146	144	139	144	131	139
Geelvet	102	114	11,939	102	114	107	101	140	142	121	103	123	80	127	109	109
Dv Snacks	105	125	11,809	105	125	110	103	148	142	123	127	124	125	133	127	121
Brood Afbak	105	128	11,602	105	128	104	106	202	166	144	157	182	50	131	124	131
Bakproducten	102	172	11,316	102	172	144	114	216	262	228	199	186	117	176	134	135
Sauzen	103	119	11,032	103	119	104	106	130	132	119	121	147	81	133	118	126
Vleeswaren	103	107	10,677	103	107	107	104	122	113	106	104	115	86	116	105	105
Smaakmakers	104	132	10,519	104	132	120	112	140	136	135	149	129	110	153	139	131
Toiletzeep	104	312	9,988	104	312	341	336	472	521	357	287	253	228	224	207	207

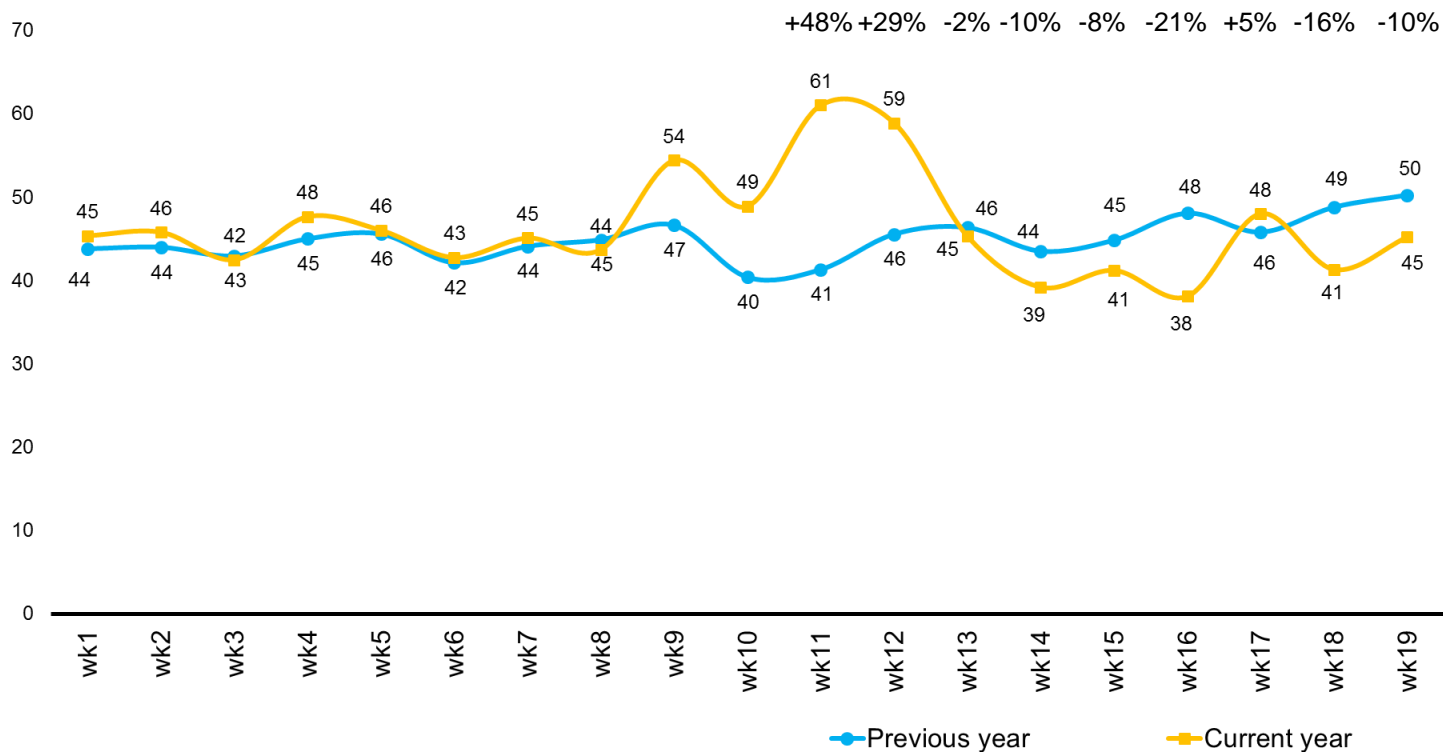
Note: estimated impact is the difference between the actual sales and the expected sales. The expected sales is based on the sales of previous year + the expected % value growth. The % expected value growth is 2.7% for most weeks (this was the growth in pre-Covid weeks). Exceptions are weeks where there is a positive or negative impact of bank holidays.



DRUG CHANNEL

DRUG SALES KEEP DECLINING VS 2019

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	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
Drogmetica	3.1	1.6	4.0	16.7	21.1	47.7	29.3	-2.2	-9.9	-8.1	-20.7	4.8	-15.3	-10.1
Deco.Cosmetica	-14.0	-1.0	-23.2	-0.9	5.1	-15.3	-37.0	-35.2	-38.9	-33.0	-37.3	-10.9	-28.3	-22.7
Geuren	-16.6	-1.6	-25.6	-10.6	-1.6	-15.8	-38.5	-53.2	-42.6	-40.5	-45.1	-13.5	-14.9	-16.0
Haarverzorging	6.6	6.9	6.4	14.6	17.7	21.6	12.5	6.7	-2.0	-8.3	-3.8	17.9	-0.3	-3.2
Health Care	8.1	0.2	14.0	17.7	26.3	96.3	83.0	7.3	-9.6	-9.8	-18.8	-2.5	-18.0	-12.6
Lichaamsverzorging	5.8	3.0	7.4	21.3	26.7	26.2	11.2	12.3	8.8	12.2	-23.1	17.9	-11.8	-2.0
Mondverzorging	1.8	4.2	-0.3	24.3	18.2	35.8	20.6	-13.7	-20.1	-22.8	-16.4	0.5	-15.0	-10.3
Papier	2.1	-1.9	5.3	28.3	21.0	80.1	39.1	-14.9	-16.5	-15.8	-14.0	-3.3	-23.9	-19.4
Schoonmaak & Onderhoud	14.3	11.9	17.1	41.7	22.5	65.8	50.3	9.6	7.9	10.6	15.7	7.6	-15.0	-10.0
Dranken Houdbaar	4.6	6.2	2.1	36.3	48.6	29.9	2.1	-19.6	2.1	22.3	-29.0	41.1	-30.7	-35.7
Kruidenierswaren	-4.5	0.3	-7.7	19.9	5.9	63.6	26.9	-22.3	-32.7	-39.7	-33.0	-24.9	-24.8	-31.2
Zoetwaren & Snacks	-2.1	4.0	-6.4	13.7	14.6	25.3	-1.6	-16.7	-18.0	-16.3	-33.1	1.4	-21.8	-15.1

SALES INDEX ON CATEGORY LEVEL - DRUG

Drug

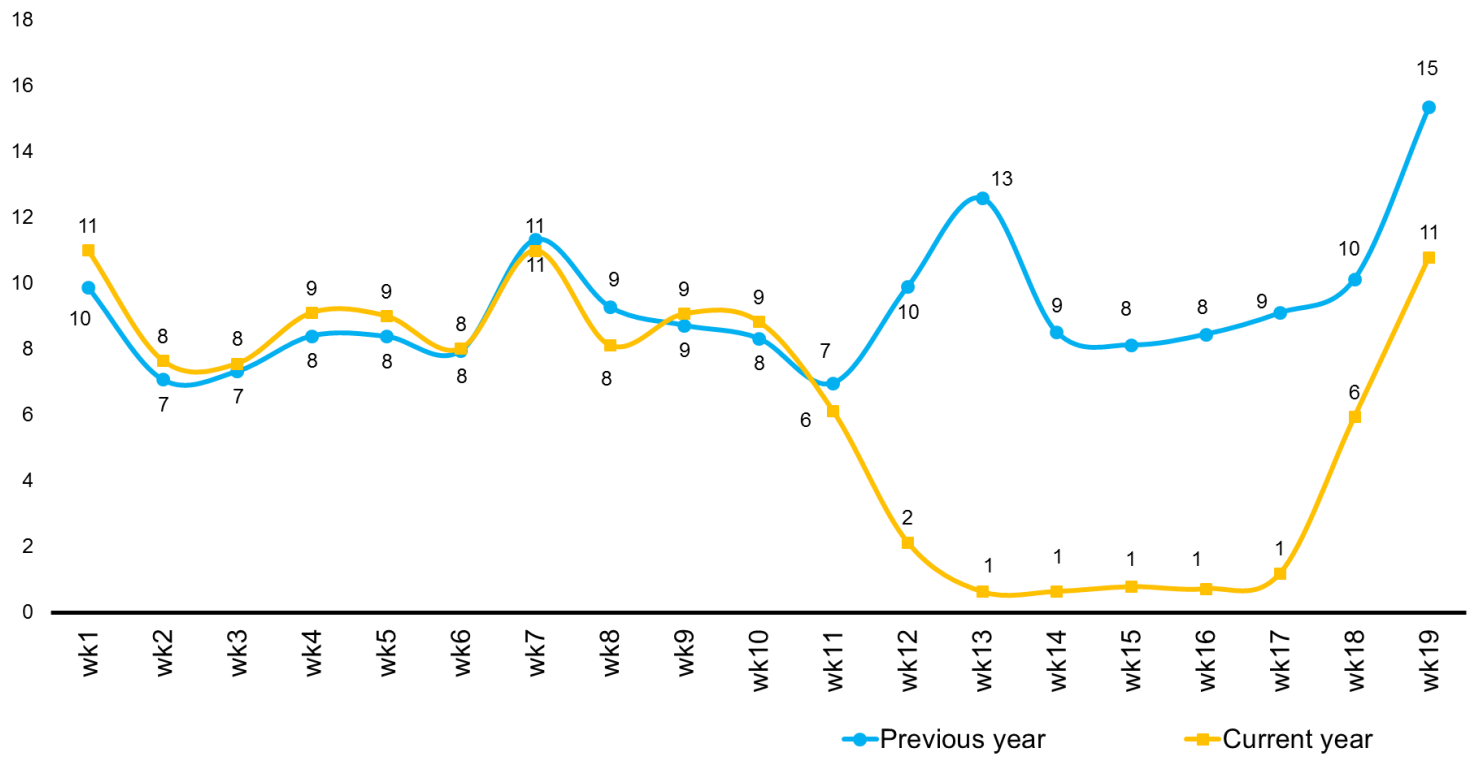
Category	Value index wk2-8 2020/2019	Value index from wk9 2020/2019	Impact in € (000) Actual minus expected	Index € sales vs PY												
				wk2-8 20	YTD from wk 9 20	w9	w10	w11	w12	w13	w14	w15	w16	w17	w18	w19
Vit/Mineralen Suppl.	99	130	10,702	99	130	129	132	206	215	125	109	101	97	114	95	87
Toiletzeep	123	278	6,955	123	278	462	382	481	375	218	232	178	192	216	166	179
Hand/Bodyproducten	93	125	5,171	93	125	109	123	132	128	175	150	118	105	142	104	103
Otc Hoest Verkoudheid En Griep	94	118	4,971	94	118	105	129	244	227	122	83	92	67	89	72	86
Haarkleurmiddelen	106	140	4,521	106	140	107	113	122	137	183	165	129	147	176	135	121
Pijnstillers	107	128	4,455	107	128	134	147	318	253	103	84	74	70	84	74	79
Vochtige Doekjes	99	129	1,601	99	129	155	152	227	187	95	129	91	103	143	82	108
Diagnostica	101	371	879	101	371	236	397	836	656	151	177	489	359	294	232	226
Huishoudreinigers	99	160	851	99	160	156	155	311	427	159	135	132	89	93	80	98
Toilet papier	85	108	670	85	108	136	130	358	106	113	83	74	74	46	69	83
Papieren Zakdoekjes	103	153	587	103	153	200	207	380	305	109	77	61	96	100	81	86
Schoonmaakhulpmiddelen	74	171	583	74	171	143	162	193	208	125	179	286	220	166	134	113
Tissues Droog	102	155	545	102	155	149	145	266	245	163	137	104	120	142	109	114
Voetverzorging	100	101	301	100	101	103	107	110	85	86	93	112	99	120	91	111
Wasmiddelen	111	119	263	111	119	161	97	157	144	115	126	102	111	116	91	99
Celstofbabyluiers	89	90	257	89	90	125	100	154	114	73	70	81	75	84	60	59
Schuimbadproducten	101	102	252	101	102	124	118	130	114	101	95	76	94	125	93	83
Keukenpapier	120	131	134	120	131	140	148	229	141	99	99	102	156	122	79	101
Toiletreinigers	69	150	127	69	150	27	71	135	140	89	506	300	129	161	136	184
Vaatwasmiddelen	101	111	120	101	111	96	143	362	110	105	63	54	99	238	64	50



PERFUMERY CHANNEL

PERFUMERY STORES ARE OPENING AGAIN

Drogmetica in Perfumery per week (euro x mln)



COVID-19

TRACKING THE IMPACT ON FMCG AND RETAIL

BE A STEP AHEAD WITH WEEKLY UPDATES

COVID-19 IS MOVING FAST, BUT YOU CAN BE FASTER.

CONTACT YOUR NIELSEN REPRESENTATIVE TO FIND OUT HOW 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**

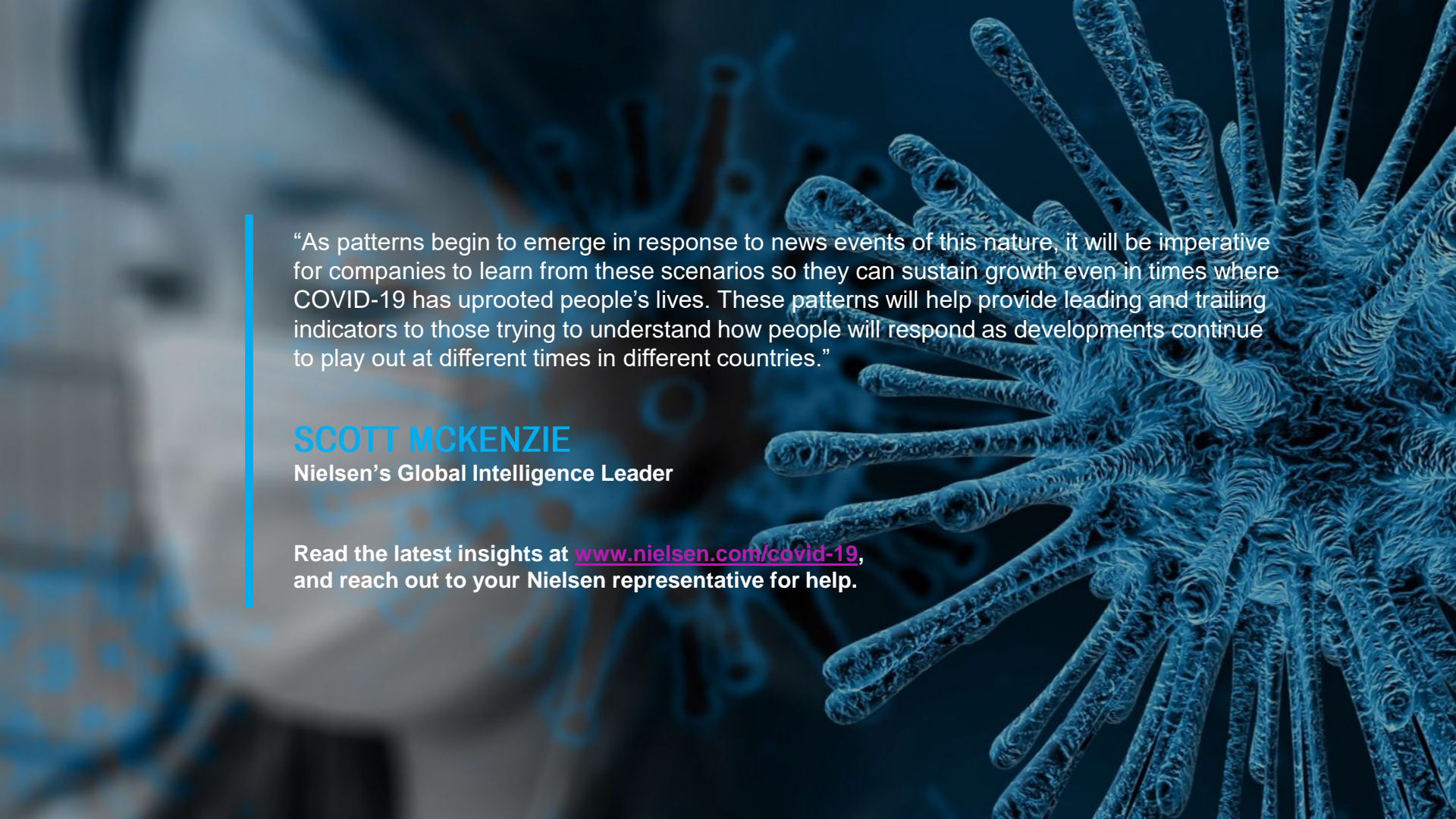


**CATEGORIES
ON DEMAND**



**DECISION MAKING
FACTORS**

Contact your Nielsen representative or sonja.vandenberg@nielsen.com for more information.

A detailed, blue-tinted microscopic image of a virus particle, likely SARS-CoV-2, showing its characteristic spherical shape and numerous surface spikes. The virus is positioned on the right side of the frame, with its spikes radiating outwards. The background is a blurred, light blue, suggesting a laboratory or medical setting.

“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.



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