COVID-19 CRISIS

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

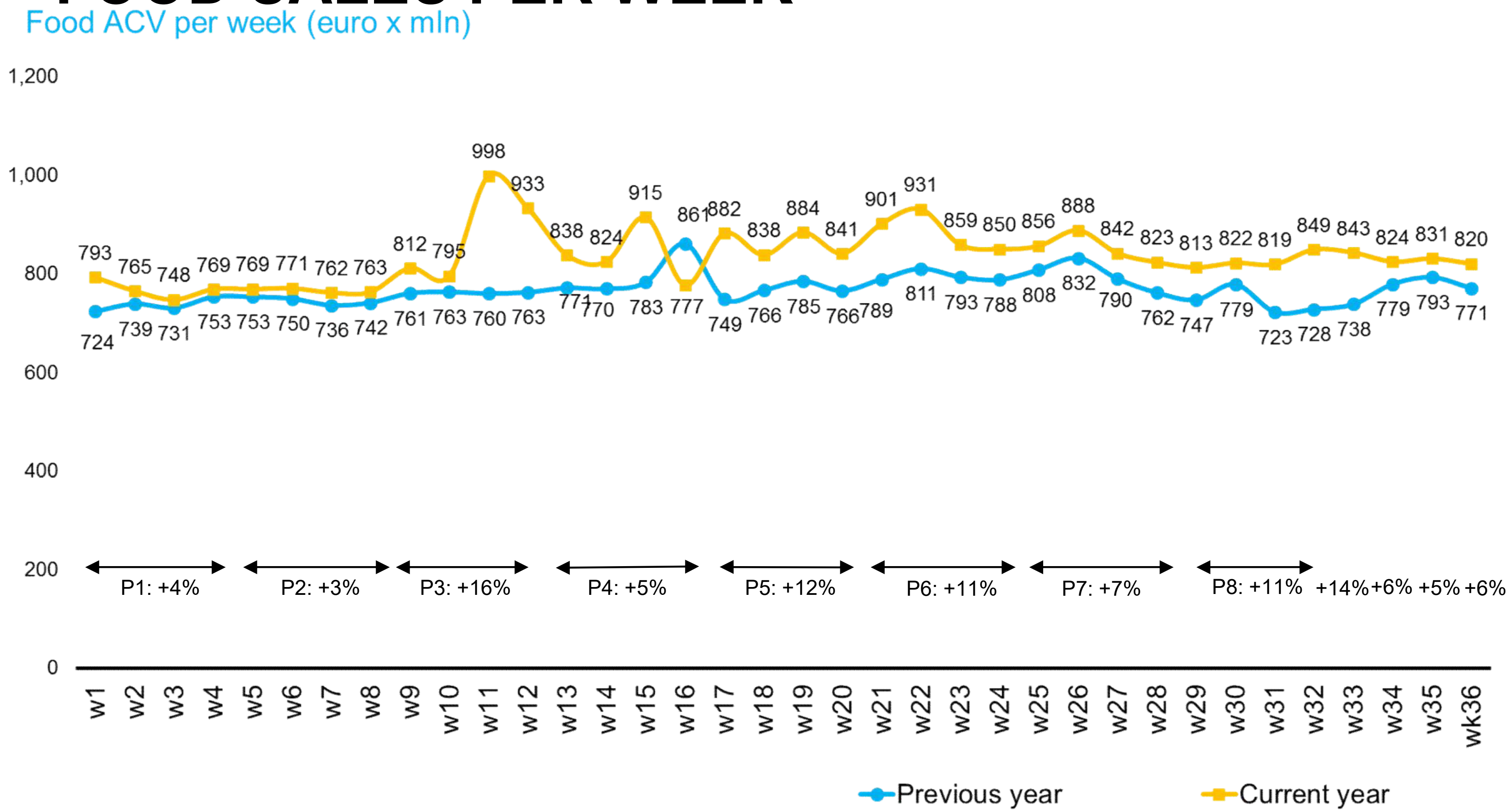
Update: September 14th, 2020

Weekly update

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

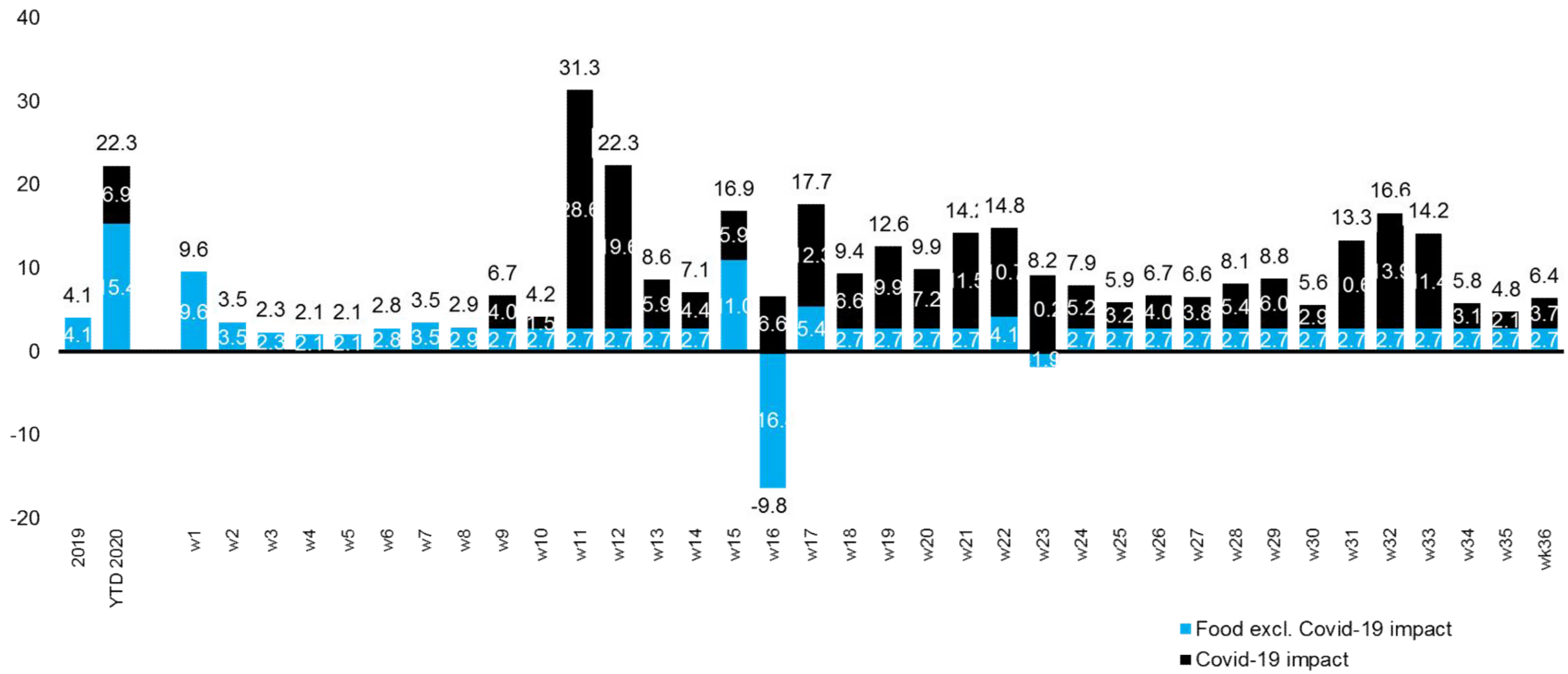
SUPERMARKETS

FOOD SALES PER WEEK



IMPACT OF COVID-19 ON SALES

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



Extra growth from wk9	Extra % growth from wk 9	Impact on % YTD growth
€ 1693M	**7.6%**	**6.9%**

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	P7 20	P8 20	wk 33 20	wk 34 20	wk 35 20	wk 36 20
Totaal Supermarkten (ACV)	8.6	2.7	10.0	16.1	5.3	12.4	11.3	6.8	11.0	14.2	5.8	4.8	6.4
Dranken Houdbaar	9.4	1.3	11.0	9.5	4.9	16.7	18.0	5.7	11.8	34.5	6.2	-2.9	8.1
Kruidenierswaren	12.1	3.2	14.6	39.0	10.2	12.8	11.5	9.9	10.6	3.2	7.1	10.9	5.7
Zoetwaren & Snacks	6.2	4.1	6.5	12.0	-1.1	5.6	7.1	7.6	11.4	-3.2	3.7	11.1	3.8
Diepvries	13.5	4.3	15.5	22.5	15.7	23.9	19.0	4.3	10.8	41.7	10.3	0.4	9.3
Vers	7.7	2.7	8.9	12.9	6.4	11.8	10.7	6.1	9.5	8.0	3.3	3.5	4.3
Schoonmaak & Onderhoud	9.3	2.5	11.5	31.9	13.8	9.3	10.3	3.0	6.2	9.4	5.9	17.8	-3.8
Drogmetica	9.9	2.9	11.8	54.6	10.0	4.8	3.3	-0.9	7.2	8.9	4.6	2.7	3.0
Haarverzorging	-1.0	0.8	-2.2	14.4	6.6	-2.6	-10.3	-6.1	-5.2	-1.9	6.6	-34.6	-3.0
Health Care	10.6	6.7	11.9	78.7	8.9	-10.7	-5.8	-6.2	5.6	12.6	8.4	2.0	6.0
Lichaamsverzorging	19.5	3.9	23.6	49.4	40.5	36.1	14.8	1.5	16.5	45.8	17.3	0.2	8.8
Mondverzorging	8.7	11.5	8.3	33.9	-6.3	8.8	2.7	8.7	6.3	8.4	3.6	8.8	-6.0
Papier	8.4	0.6	10.5	61.1	4.2	-1.9	2.7	-1.6	6.4	-1.0	0.5	10.3	3.5
Rookwaren	8.9	2.7	10.3	6.9	2.8	9.7	14.4	10.1	13.7	26.9	12.9	4.6	12.3

SALES INDEX ON CATEGORY LEVEL

Ranked on estimated impact of Covid-19

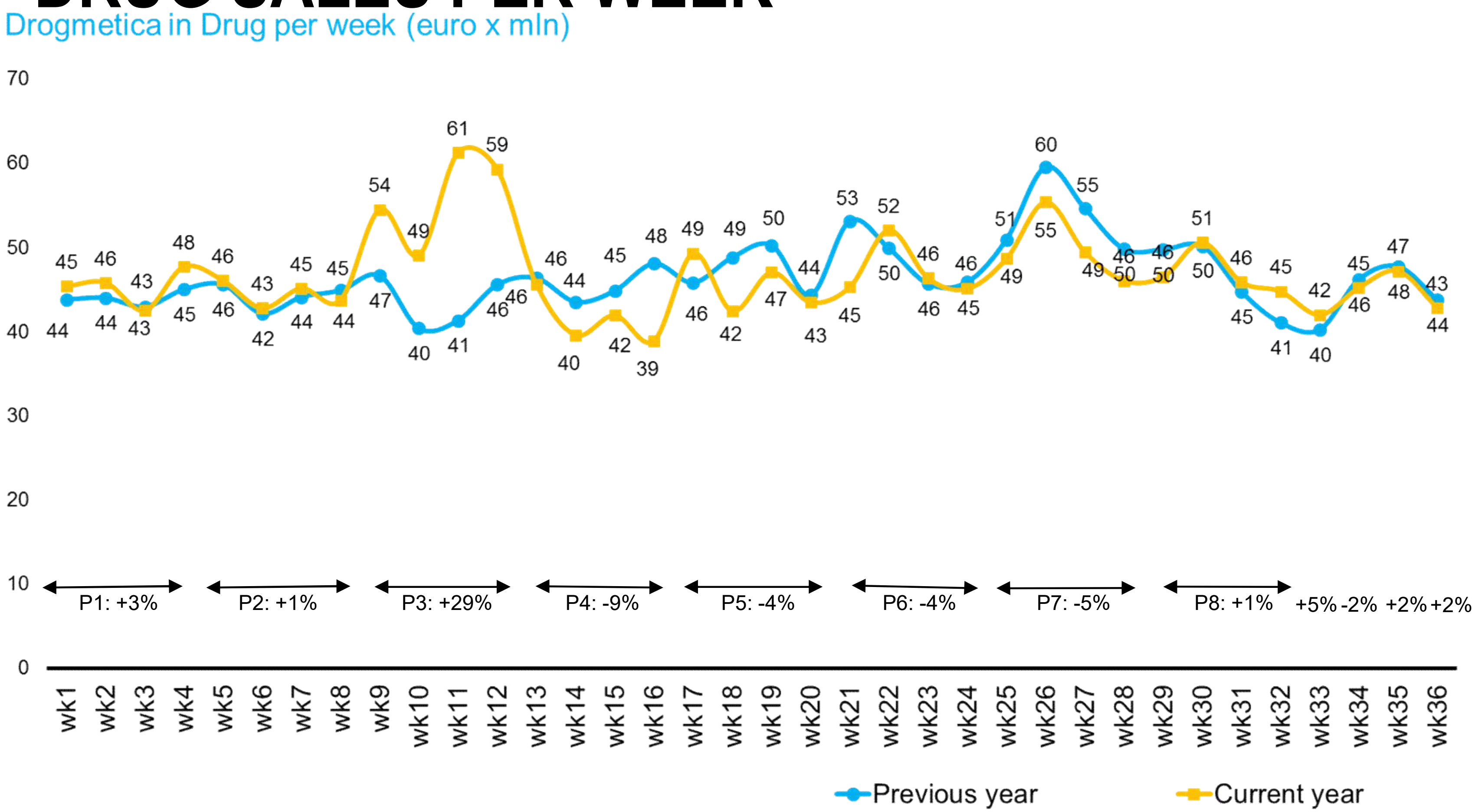
Overview categories

					Index € sales vs PY											
Category	Value index wk2-8 2020/2019	Value index from wk9 2020/2019	Difference in index pts	Est. Impact in € (000) Actual minus expected	wk2-8 20	YTD from wk 9 20	P3 20	P4 20	P5 20	P6 20	P7 20	P8 20	w33 20	w34 20	w35 20	w36 20
Vlees	100	113	13	161,093	100	113	120	113	118	116	106	114	105	101	106	106
Fruit	105	116	11	149,708	105	116	116	124	119	117	109	114	127	110	100	108
Groenten	99	111	11	109,702	99	111	110	112	118	113	108	109	106	104	103	106
Bier	102	112	10	91,113	102	112	101	104	124	126	103	114	152	104	92	107
Stille Wijnen	96	111	15	75,067	96	111	101	106	120	119	109	114	114	103	104	108
Koffie excl. oplos	104	118	14	52,948	104	118	121	117	123	128	121	112	95	113	117	106
Zuivel	102	108	6	50,228	102	108	109	106	110	109	108	108	109	109	105	102
Shag	100	113	14	46,277	100	113	107	103	112	120	116	117	128	119	111	115
Kaas	103	108	5	42,589	103	108	113	104	111	110	108	108	102	103	104	103
Sigaretten	104	109	5	40,934	104	109	106	102	109	112	108	113	127	111	102	111
Dv Ijs	107	116	9	30,621	107	116	106	127	155	127	90	106	230	110	66	122
Vleeswaren	104	108	4	27,392	104	108	112	103	110	108	109	108	99	105	108	105
Brood Afbak	105	127	22	24,975	105	127	143	118	127	132	124	128	127	116	117	119
Frisdranken	104	106	2	24,884	104	106	109	98	108	109	99	107	158	107	88	102
Toiletzeep	104	286	182	23,713	104	286	432	322	322	288	239	212	221	200	204	197
Dv Snacks	105	122	17	23,212	105	122	125	125	126	119	121	122	108	112	125	115
Pindas Noten+Aanv	103	114	11	23,040	103	114	111	110	123	118	115	114	101	106	108	104
Sauzen	103	115	12	20,691	103	115	118	114	124	121	107	114	115	99	102	113
Smaakmakers	104	127	22	20,598	104	127	127	131	141	131	123	121	100	116	128	114
Groentenconserven	104	121	17	18,956	104	121	184	110	103	114	113	117	97	112	105	110

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	P3 20	P4 20	P5 20	P6 20	P7 20	P8 20	wk 33 20	wk 34 20	wk 35 20	wk 36 20
Drogmetica	0.8	1.6	0.5	28.8	-9.1	-3.7	-3.0	-7.2	1.1	4.3	-2.1	-1.1	-2.1
Deco.Cosmetica	-12.6	-1.0	-16.0	-12.4	-35.4	-17.5	-18.5	-9.9	-4.4	-20.7	-16.9	-2.3	-11.0
Geuren	-11.2	-1.2	-13.7	-16.1	-43.3	-9.9	-27.1	15.5	-3.8	-0.8	-10.2	-7.9	-14.5
Haarverzorging	3.4	6.9	2.4	16.5	-1.4	6.0	2.6	-5.1	-1.1	0.4	-1.7	3.9	0.4
Health Care	3.3	0.2	4.2	55.6	-6.8	-8.8	-3.6	-8.3	0.0	3.7	4.4	3.1	2.9
Lichaamsverzorging	3.5	3.1	3.6	21.4	2.9	4.5	5.7	-11.6	6.0	27.0	-0.6	-5.2	-2.1
Mondverzorging	1.2	4.2	0.2	24.9	-18.1	-3.0	-3.1	5.5	1.4	-12.2	-5.8	1.8	-4.6
Papier	-0.7	-1.9	-0.4	42.5	-14.2	-9.1	-5.7	-6.6	-1.7	-6.6	-7.2	-6.7	-4.6
Schoonmaak & Onderhoud	10.1	12.0	10.0	44.5	11.3	0.6	9.8	12.5	-2.9	-15.1	-3.3	28.4	-3.8
Dranken Houdbaar	5.5	6.2	4.7	28.4	-8.6	-6.3	17.7	-4.7	7.0	39.1	3.7	-1.5	-3.1
Kruidenierswaren	-4.4	0.3	-5.6	33.2	-25.5	-18.9	-11.7	-7.7	-4.3	-15.1	-2.2	10.5	-12.4
Zoetwaren & Snacks	1.5	4.2	0.6	13.0	-19.9	-7.7	-0.6	11.9	6.4	-7.7	-2.4	17.0	9.8

SALES INDEX ON CATEGORY LEVEL - DRUG

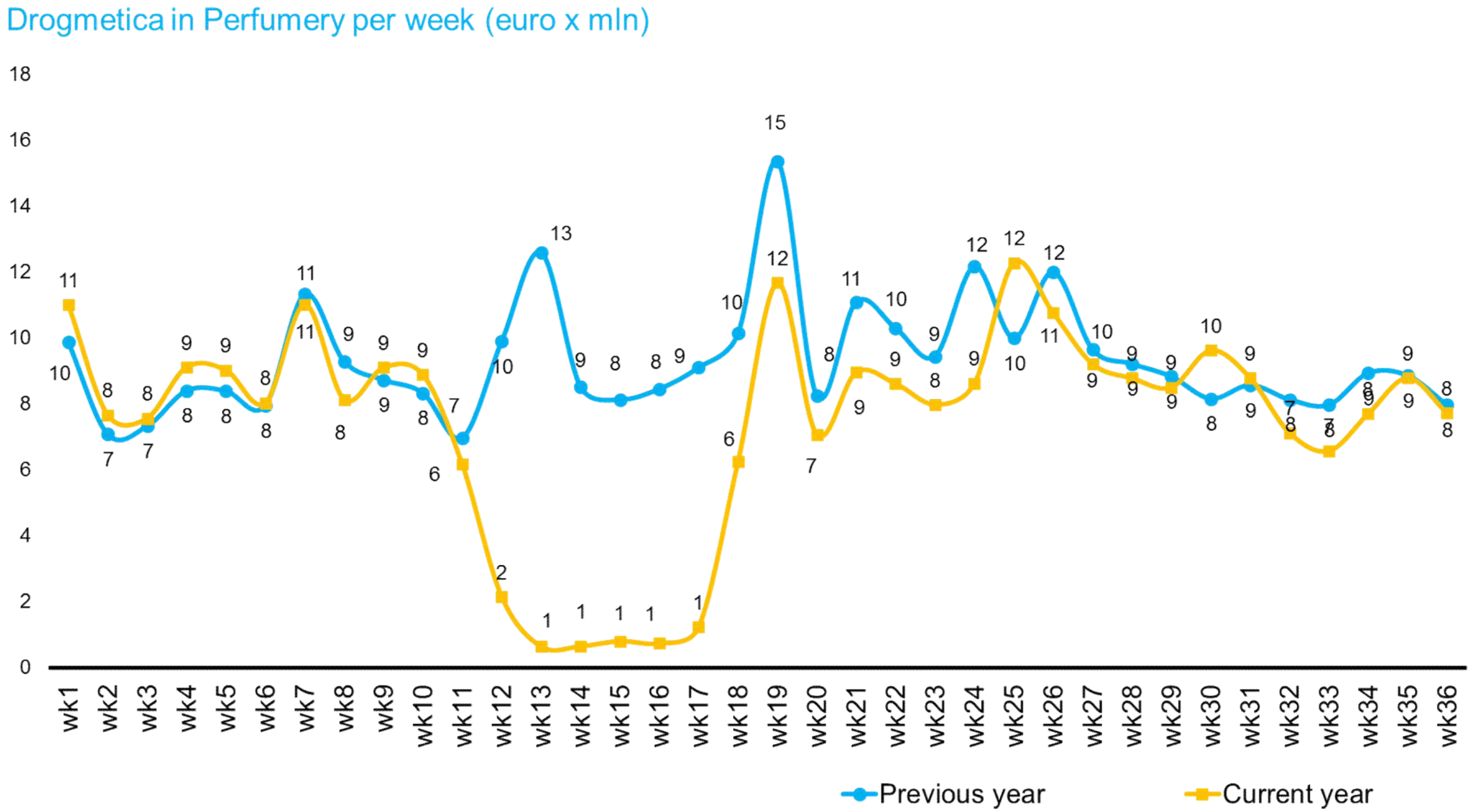
Drug

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 20	P4 20	P5 20	P6 20	P7 20	P8 20	w33 20	w34 20	w35 20	w36 20
Toiletzeep	123	273	17,330	123	273	428	238	283	266	224	276	207	231	198	192
Vit/Mineralen Suppl.	100	119	16,373	100	119	172	111	102	107	112	118	88	108	118	109
Hand/Bodyproducten	92	112	7,384	92	112	122	136	111	114	94	106	112	97	98	102
Haarkleurmiddelen	106	120	5,224	106	120	121	156	142	110	102	106	96	103	109	100
Otc Hoest Verkoudheid En Griep	94	106	3,788	94	106	169	90	83	99	89	103	87	87	102	104
Vochtige Doekjes	99	111	1,875	99	111	180	104	110	108	94	101	110	99	90	83
Diagnostica	102	284	1,759	102	284	625	245	204	197	239	195	194	225	218	226
Celstofbabyluiers	89	92	1,299	89	92	124	77	81	89	90	94	92	81	83	99
Huishoudreinigers	99	128	1,089	99	128	253	129	97	105	98	132	84	99	115	114
Schuimbadproducten	101	103	810	101	103	121	92	101	96	102	100	121	113	100	98
Schoonmaakhulpmiddelen	74	130	758	74	130	175	190	130	121	113	83	84	108	114	111
Tissues Droog	102	131	734	102	131	201	130	125	116	117	103	119	109	110	113
Papieren Zakdoekjes	103	124	517	103	124	275	88	94	101	92	89	76	107	123	106
Machinevaatwasmiddel	107	118	376	107	118	205	137	74	127	173	104	68	152	109	67
Vaatwasmiddelen	101	119	361	101	119	155	82	117	158	153	88	87	39	143	125
Toiletpapier	85	92	317	85	92	158	86	69	86	79	82	72	82	89	72
Toiletreinigers	69	132	258	69	132	70	224	165	373	72	73	58	66	129	75
Opzettandenborstels	114	113	225	114	113	140	77	94	123	137	120	98	120	111	88
Keukenpapier	120	124	213	120	124	168	116	106	146	98	122	93	83	107	183
Anti Kalk	74	149	213	74	149	84	94	133	192	201	187	133	170	248	212

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



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

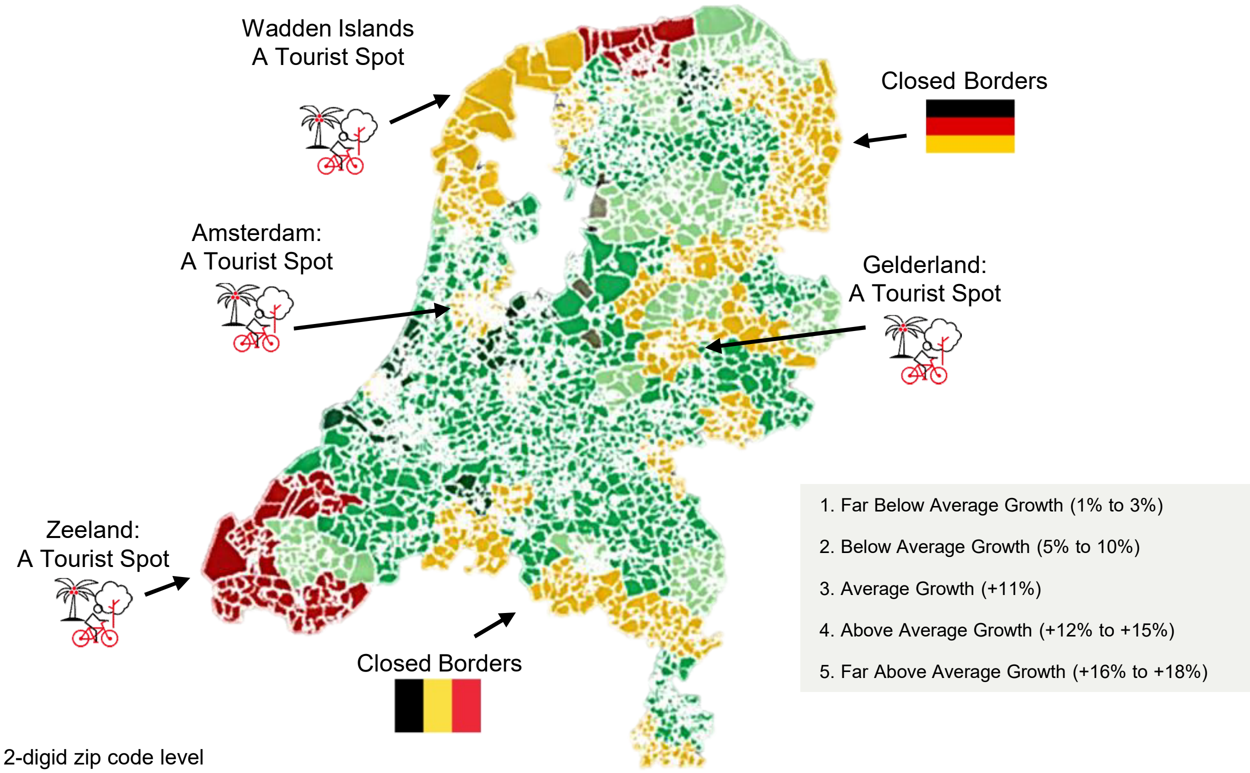
SLOWER SALES GROWTH AT THE BORDER DURING COVID-19

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.



Nielsen: Based on micro-clusters of stores down to 2-digid zip code level

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

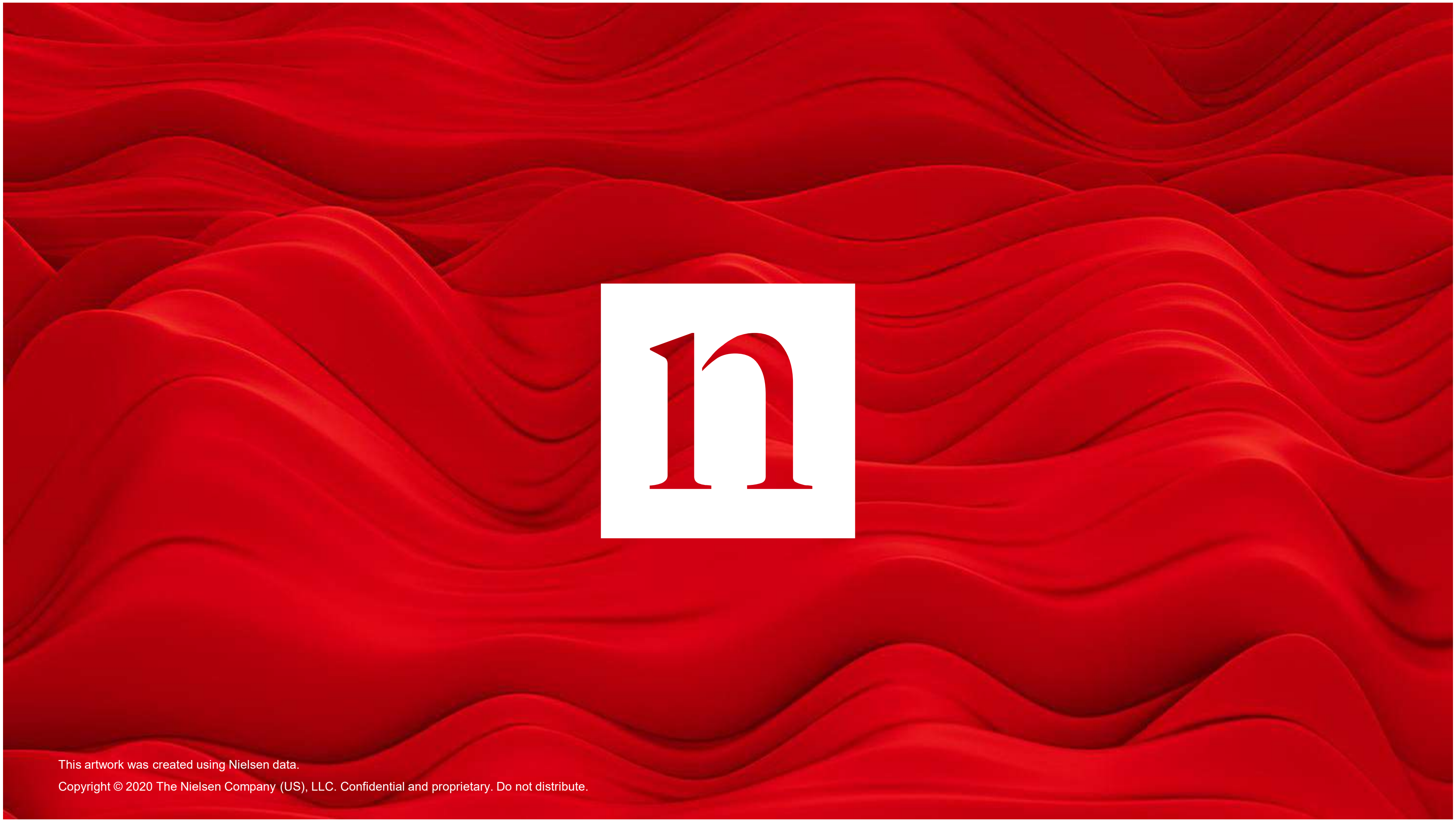
Contact your Nielsen representative or sonja.vandenberg@nielsen.com for more information.

"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.