COVID-19 CRISIS

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

Update: December 2nd, 2020

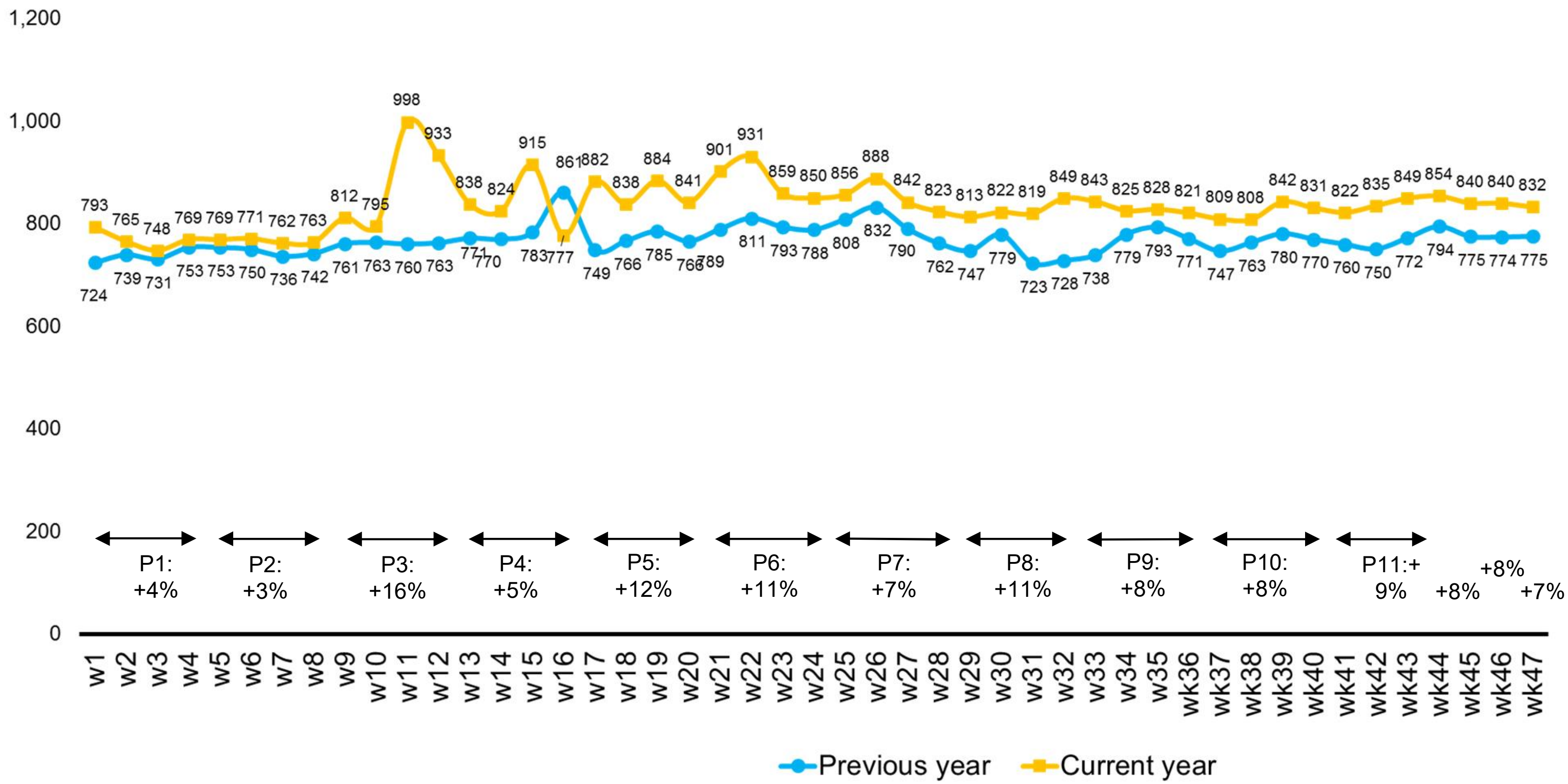
Weekly update

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

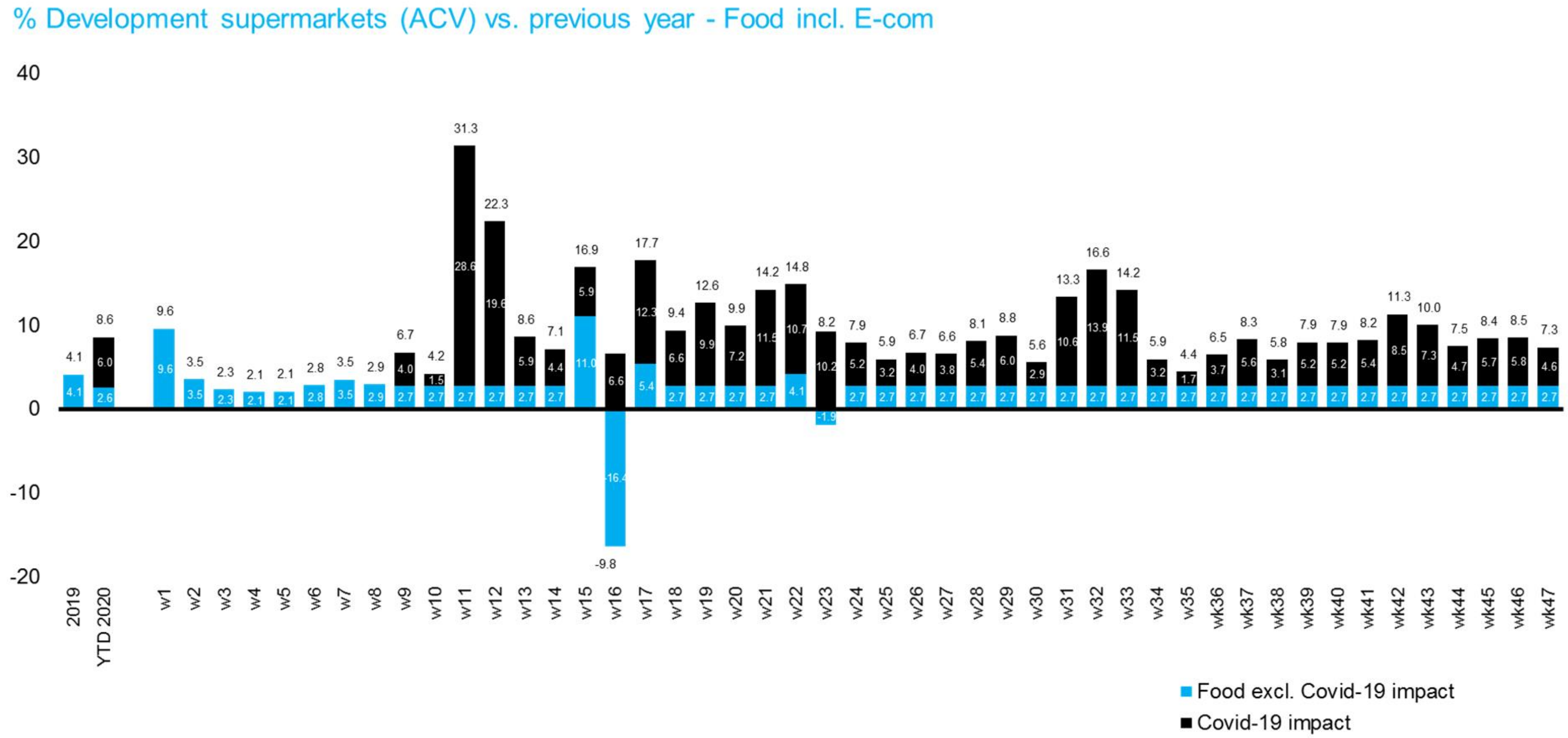
SUPERMARKETS

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
€ 2161M	**7%**	**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	P7 20	P8 20	P9 20	P10 20	P11 20	wk 45 20	wk 46 20	wk 47 20
Totaal Supermarkten (ACV)	8.6	2.7	9.5	16.1	5.3	12.4	11.3	6.8	11.0	7.6	7.5	9.2	8.4	8.5	7.3
Dranken Houdbaar	9.5	1.3	10.7	9.5	4.9	16.7	18.0	5.8	11.9	11.0	9.1	9.4	12.7	10.7	8.9
Kruidenierswaren	11.4	3.2	13.0	39.0	10.2	12.8	11.5	9.9	10.7	7.1	7.3	11.2	9.9	7.0	7.3
Zoetwaren & Snacks	5.8	4.1	5.9	12.0	-1.1	5.7	7.1	7.7	11.6	4.2	3.3	5.3	2.0	6.1	4.5
Diepvries	13.7	4.4	15.2	22.5	15.7	23.9	19.0	4.3	10.9	14.8	13.4	14.6	16.1	12.6	15.7
Vers	7.6	2.7	8.5	12.9	6.5	11.8	10.8	6.2	9.6	5.1	6.2	8.2	7.7	7.2	6.7
Schoonmaak & Onderhoud	9.4	2.5	11.1	32.0	13.9	9.4	10.5	3.2	6.6	7.8	10.8	7.3	11.0	14.3	5.5
Drogmetica	9.2	2.9	10.5	54.7	10.1	4.9	3.5	-0.7	7.5	5.0	7.0	9.7	7.1	10.3	-9.2
Haarverzorging	-1.2	0.8	-2.2	14.4	6.6	-2.6	-10.3	-6.1	-5.1	-11.1	-3.6	-2.7	-5.5	35.2	-18.2
Health Care	9.4	6.7	10.0	78.7	8.9	-10.7	-5.8	-6.1	5.6	7.2	5.8	8.4	6.1	11.1	-12.4
Lichaamsverzorging	18.3	3.9	21.0	49.7	40.6	36.2	15.1	1.6	16.8	16.7	19.5	14.6	20.3	7.3	-14.2
Mondverzorging	7.1	11.5	6.5	33.9	-6.3	8.8	2.7	8.8	6.6	4.0	4.9	5.2	3.8	29.3	-35.9
Papier	8.3	0.6	9.8	61.3	4.4	-1.8	3.0	-1.3	6.7	3.8	5.5	11.1	6.0	5.0	2.1
Rookwaren	9.2	2.7	10.4	6.9	2.8	9.7	14.4	10.1	13.7	13.9	13.3	8.4	9.6	10.2	8.6

SALES INDEX ON CATEGORY LEVEL

Ranked on estimated impact of Covid-19

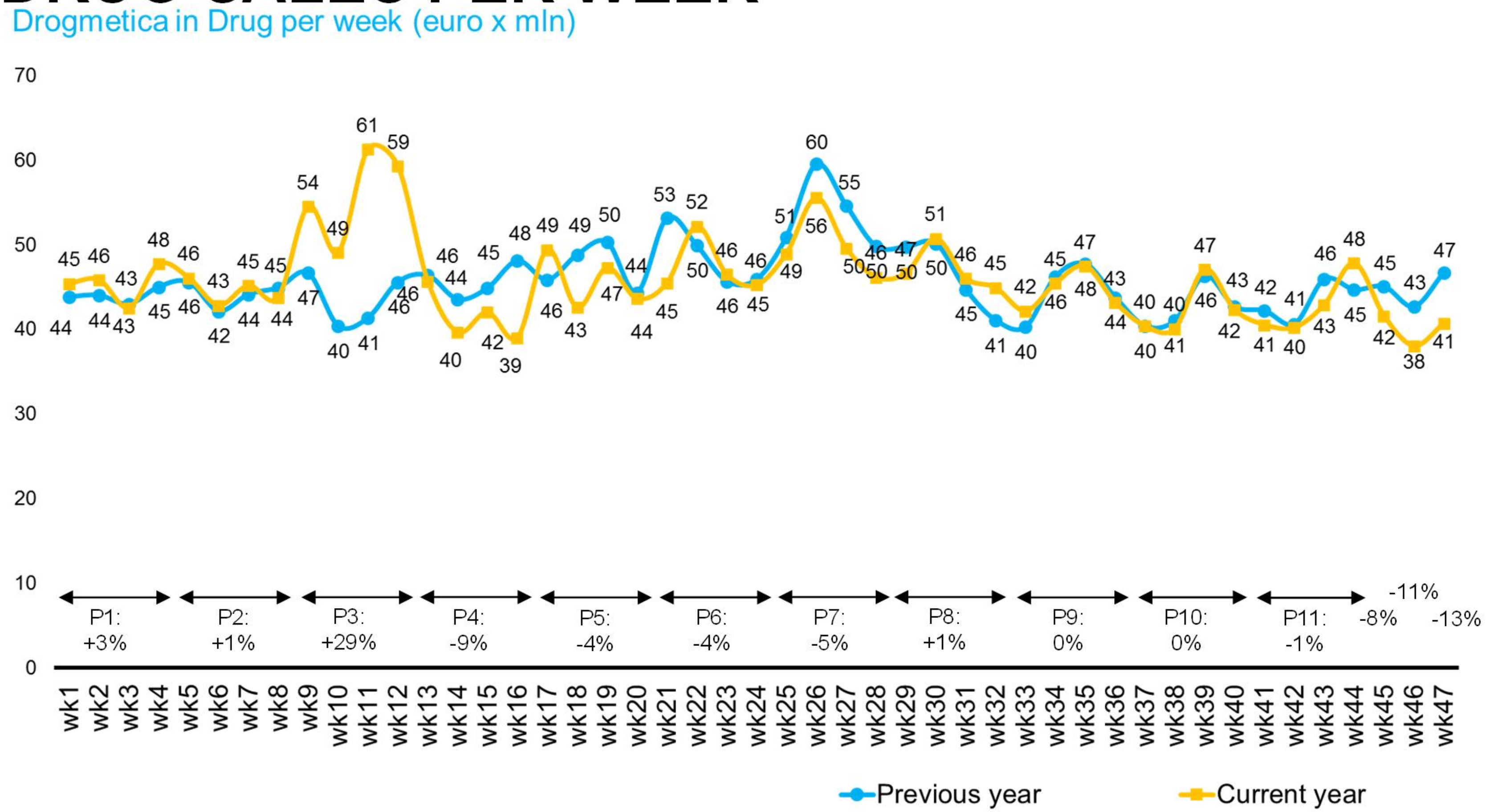
Overview categories

						Index € sales vs PY													
Nr	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	P9 20	P10 20	P11 20	w45 20	w46 20	w47 20
1	Vlees	100	114	13	230,642	100	114	121	114	119	118	109	116	106	108	113	114	113	111
2	Fruit	105	115	11	198,031	105	115	117	124	119	117	109	115	112	112	116	116	114	115
3	Groenten	99	111	12	156,928	99	111	110	112	118	113	108	109	105	111	114	112	111	111
4	Bier	102	112	10	119,744	102	112	101	104	124	126	103	114	112	112	111	112	113	114
5	Stille Wijnen	96	111	15	103,931	96	111	101	107	120	120	109	115	108	107	110	115	114	114
6	Zuivel	102	108	6	66,646	102	108	109	106	111	109	108	108	107	106	108	109	110	106
7	Shag	100	114	14	66,047	100	114	107	103	112	120	116	117	118	117	114	115	115	113
8	Koffie excl. oplos	104	117	12	65,119	104	117	121	117	123	128	121	112	107	110	114	129	113	100
9	Sigaretten	104	109	5	54,760	104	109	106	102	109	112	108	113	113	112	106	107	108	107
10	Kaas	103	107	5	50,227	103	107	113	104	111	110	108	108	104	106	106	103	105	105
11	Dv Ijs	107	118	11	40,871	107	118	106	127	155	127	90	106	124	129	117	143	125	132
12	Frisdranken	104	106	2	34,629	104	106	109	98	108	109	99	107	112	107	104	106	110	105
13	Brood Afbak	105	125	20	31,373	105	125	143	118	127	132	124	128	120	115	124	119	122	120
14	Dv Snacks	105	121	16	31,108	105	121	125	125	126	119	121	122	115	116	121	120	115	126
15	Toiletzeep	104	265	161	29,551	104	265	435	322	322	290	239	213	206	198	230	226	232	156
16	Smaakmakers	104	126	21	28,082	104	126	127	131	141	131	123	121	115	119	123	130	129	122
17	Sauzen	103	114	11	26,062	103	114	118	114	124	121	107	115	107	109	112	114	115	116
18	Pindas Noten+Aanv	103	112	9	25,580	103	112	111	110	123	118	115	114	104	106	110	105	106	107
19	Melk/Karnemelk Lhb	97	117	20	23,711	97	117	145	108	114	122	107	114	117	109	118	109	113	113
20	Huishoudreinigers	111	135	24	23,588	111	135	171	154	137	139	116	123	123	128	129	136	127	115

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	P9 20	P10 20	P11 20	wk45 20	wk46 20	wk47 20
Drogmetica	0.0	1.6	-0.4	28.8	-9.0	-3.4	-2.7	-6.9	1.4	0.1	-0.4	-1.1	-7.8	-10.9	-12.9
Deco.Cosmetica	-13.5	-1.0	-16.1	-12.4	-35.4	-17.5	-18.5	-9.8	-4.4	-12.1	-15.0	-15.9	-16.7	-20.4	-23.4
Geuren	-11.9	-1.2	-13.7	-16.1	-43.2	-9.5	-26.4	17.0	-3.0	-7.6	-6.3	-21.1	-26.4	-17.7	-16.2
Haarverzorging	1.8	6.9	0.9	16.5	-1.4	6.0	2.7	-5.0	-1.0	1.4	-1.5	-1.9	-7.6	-7.7	-11.3
Health Care	3.1	0.2	3.7	55.7	-6.6	-8.5	-3.3	-8.1	0.3	4.0	2.5	6.1	1.4	-8.6	-8.2
Lichaamsverzorging	2.4	3.1	2.2	21.4	3.0	4.8	6.0	-11.3	6.1	3.9	1.9	1.0	-11.5	-12.8	-14.8
Mondverzorging	-0.3	4.2	-1.2	24.9	-18.0	-2.7	-2.7	5.9	2.0	-4.2	-1.9	-5.5	-11.2	-9.8	-12.0
Papier	-0.8	-1.9	-0.6	42.5	-14.2	-9.0	-5.6	-6.5	-1.5	-5.8	4.5	-3.1	-5.6	-4.5	-12.7
Schoonmaak & Onderhoud	10.2	12.0	10.1	44.5	11.3	0.7	9.8	12.5	-2.7	1.4	7.6	13.7	17.9	14.8	-3.3
Dranken Houdbaar	6.2	6.2	5.8	28.4	-8.6	-6.3	17.7	-4.7	7.0	7.3	6.4	12.1	9.8	8.4	2.6
Kruidenierswaren	-4.6	1.1	-5.7	35.6	-23.9	-18.0	-10.2	-6.9	-3.6	-4.2	-6.6	-4.0	-20.3	-18.5	-18.9
Zoetwaren & Snacks	1.4	4.1	0.9	13.2	-19.8	-7.6	-0.4	12.0	6.1	6.5	1.9	-1.1	-0.2	7.2	-1.5

SALES INDEX ON CATEGORY LEVEL - DRUG

Drug

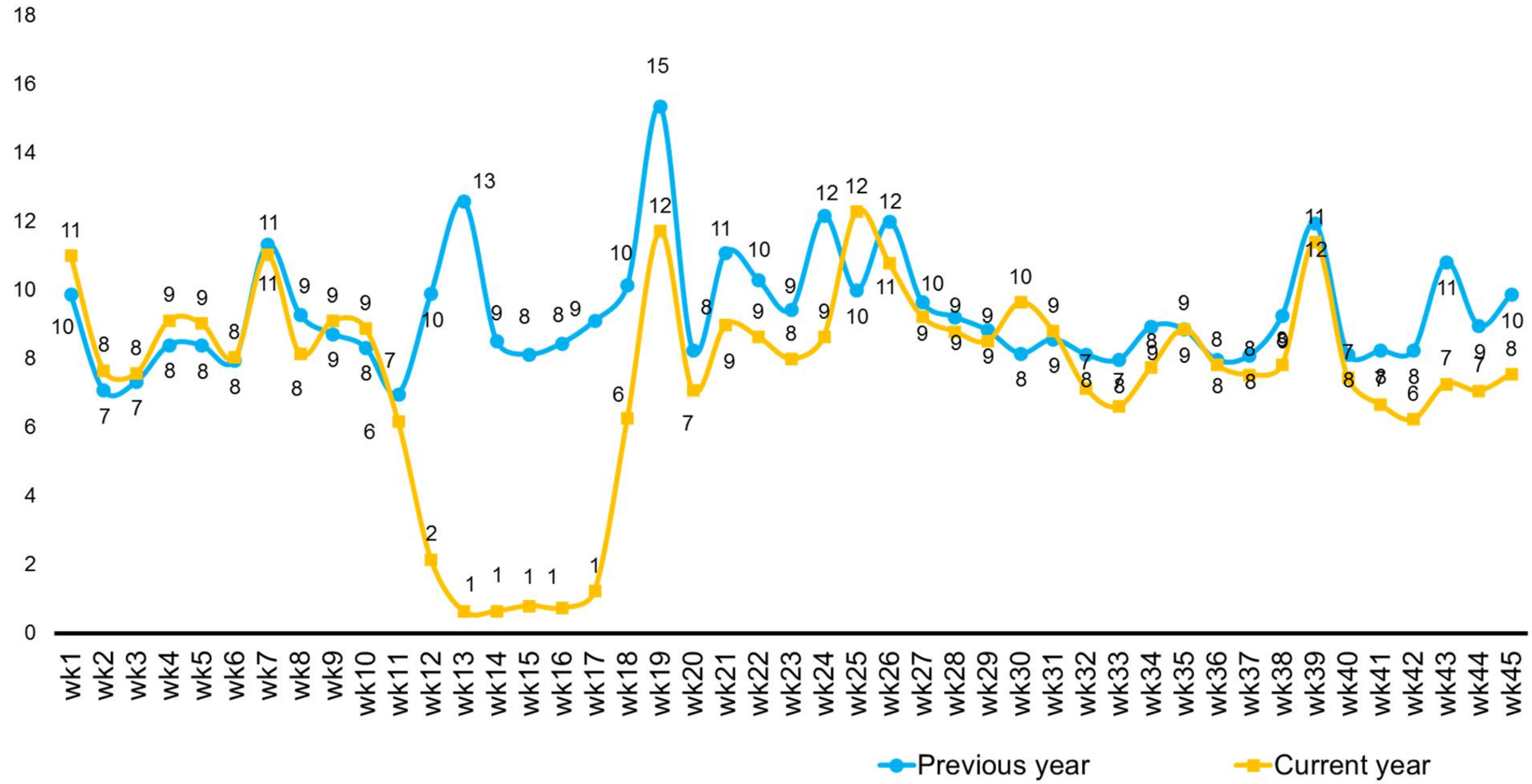
					Index € sales vs PY													
Nr	Category	Value index wk2-8 2020/2019	Value index from wk9 2020/2019	Impact in € (000) Actual minus expected	wk2-8 20	YTD from wk 9 20	P3 20	P4 20	P5 20	P6 20	P7 20	P8 20	P9 20	P10 20	P11 20	w45 20	w46 20	w47 20
1	Vit/Mineralen Suppl.	100	121	26,670	100	121	172	111	102	107	112	119	107	114	141	132	105	113
2	Toiletzeep	123	250	20,644	123	250	429	238	284	266	224	277	206	196	215	155	150	138
3	Hand/Bodyproducten	92	108	7,568	92	108	122	136	112	114	95	107	102	102	100	89	84	81
4	Haarkleurmiddelen	106	115	5,157	106	115	121	156	142	110	102	106	103	102	100	110	112	94
5	Diagnostica	102	276	2,404	102	276	625	245	204	197	240	195	227	260	282	253	198	178
6	Celstofbabyluiers	89	93	2,358	89	93	124	77	81	89	90	94	88	100	92	95	106	89
7	Vochtige Doekjes	99	109	2,248	99	109	180	104	110	108	94	102	95	113	104	91	103	86
8	Huishoudreinigers	99	138	2,000	99	138	253	129	97	105	98	134	105	191	144	164	169	156
9	Tissues Droog	102	125	839	102	125	201	130	125	116	117	107	120	112	114	91	84	100
10	Schoonmaakhulpmiddelen	74	118	683	74	118	176	191	131	121	113	84	105	104	62	67	74	64
11	Toiletpapier	85	94	654	85	94	158	86	69	86	79	82	79	115	95	86	75	76
12	Machinevaatwasmiddel	107	119	586	107	119	205	137	74	127	173	104	91	92	124	385	104	102
13	Vaatwasmiddelen	101	118	494	101	118	155	82	117	158	153	88	91	68	196	226	208	163
14	Schuimbadproducten	101	102	436	101	102	121	92	102	98	104	100	108	102	101	85	90	90
15	Toiletreinigers	69	144	397	69	144	70	224	165	373	72	73	89	264	110	150	196	172
16	Anti Kalk	74	159	330	74	159	84	94	133	192	201	187	187	196	189	220	125	173
17	Voetverzorging	100	99	213	100	99	102	102	116	98	89	98	101	99	87	89	91	84
18	Papieren Zakdoekjes	103	109	194	103	109	275	88	94	101	92	89	103	87	83	67	60	69
19	Bleekmiddelen	113	135	181	113	135	347	119	65	157	132	110	127	183	121	140	131	111
20	Toiletblokken	113	118	172	113	118	123	85	141	132	115	103	95	135	131	327	282	50

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

LEARN HOW YOU CAN CONTRIBUTE TO THE RESILIENCE OF YOUR SHOPPERS

BUILDING RESILIENCE IN TIMES OF DISRUPTION

The resilience research we have conducted is about the measurement of resilience in a time of disruption for society as a whole and for FMCG and Retail in particular. The results will give you **input for relevant actions in order to help your consumers to cope with the consequences of the disruption Covid-19 is causing.**

At the same time, we have measured the particular **resilience indexes for different FMCG and Retail brands.** Knowing your specific brand index gives you insight into your performance in the category and it will provide you with the guidelines to help your consumer in the most relevant way to live the disruption.

REPORT AVAILABLE NOW!

Details: n=2000 shoppers, Netherlands & Belgium, in cooperation with Burat and UGent

For more information, please contact Sonja van den Berg (sonja.vandenberg@nielsen.com)

SHOPPER SHIFTS TO A "NEW NORMAL"

A GLOBAL TRACKER OF HOW BEHAVIOURS CONTINUE TO EVOLVE THROUGH COVID-19 – REPORT FOR SEPTEMBER MEASUREMENT COMING UP!

Behaviours are changing faster than ever and this Nielsen shopper solution will provide insight into the channels, store types, categories, brands and packs which are in demand, why and how those needs and behaviours are likely to shift into the future and how this varies across different shopper segments identified through the research. Soon available for May and September waves.

TRIPS & MISSION PATTERNS

CHANNEL & STORE USAGE INCL. ONLINE

CATEGORIES ON DEMAND

DECISION MAKING FACTORS

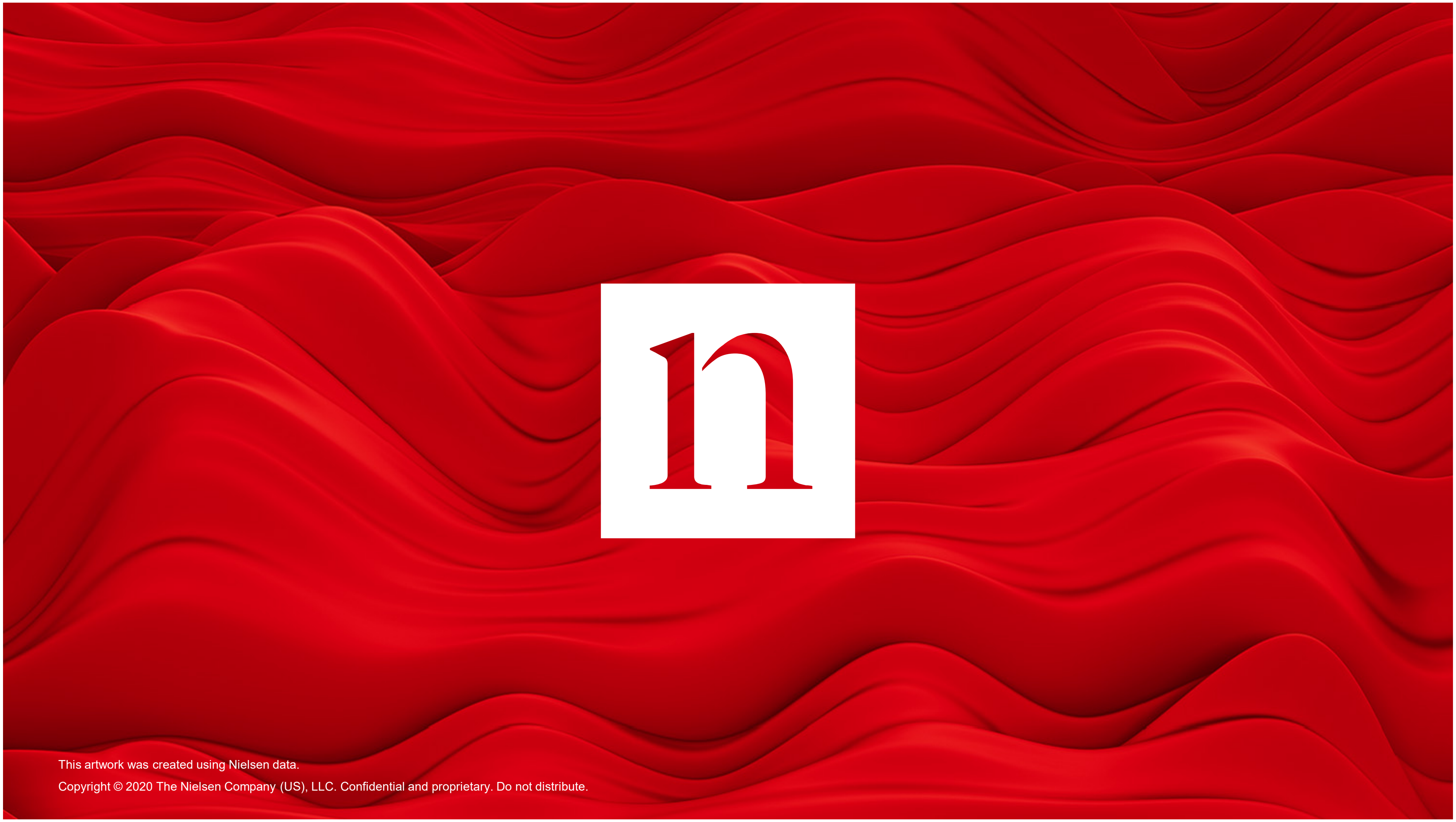
Contact your Nielsen representative or sonja.vandenberg@nielsen.com for more information.

"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.