BOSTON CONSULTING GROUP

Consumer Spending Tracker: COVID-19 Impact

Spending in MULOC retailers in select NA and Europe countries

APRIL 23, 2020

IRi Growth delivered.

Executive summary

As the COVID-19 outbreak accelerates in Europe and the United States, governments, businesses, and consumers are changing behaviors rapidly – this is reflected in consumer purchases in Italy, France, US, Germany, Netherlands, New Zealand, UK, and Spain.

Across geographies, edible sales remain elevated as in-home consumption increases due to stay-at-home orders; Nonedible sales have reverted to normal

Nonedible Private Label brands grew share during peak stockpiling; while most markets returned to pre-COVID share, Spain remains elevated

eCommerce continues to show strong growth over last year in Italy, France, and Spain, indicating consumers are shifting their purchasing patterns from in-store to online. In all 3 countries, there is a consistent, increasing shift to eCommerce since the beginning of the crisis

Easter candy sales declined in the United States, Italy, France and the UK with offsetting growth in proteins resulting in overall growth in all countries except the UK where Edible sales were flat vs. YA

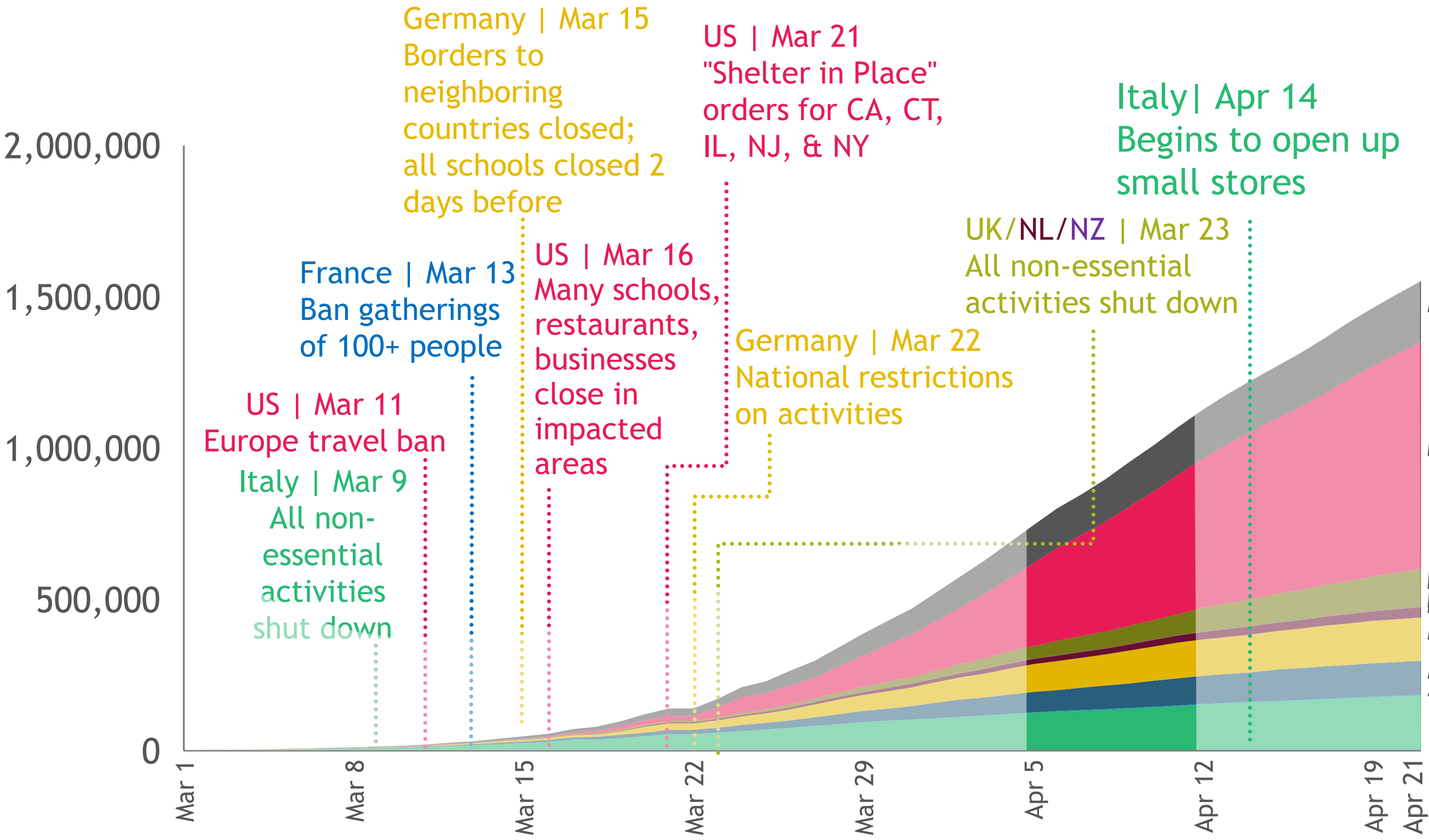
Trends towards smaller CPG manufacturers are so far continuing post COVID, with slightly more benefit to Mid-Size and negative impact on Extra Small companies

Contents

Market context and conditions

Countries are at different points in the crisis and are dealing with different levels of infection during this analysis period

Cumulative no. of confirmed cases



Data through 4/21/20

	Cases Confirmed		Deaths
	Total	Past 24 hrs	Total
Spain	200,210	4,266	20,852
US	751,273	27,668	35,884
UK	124,747	4,676	16,509
NZ	1,107	2	13
Netherlands	33,405	750	3,751
Germany	143,457	1,785	4,598
France	113,513	2,050	20,233
Greece	2,245	10	116
Italy	181,228	2,256	24,114

Source: World Health Organization

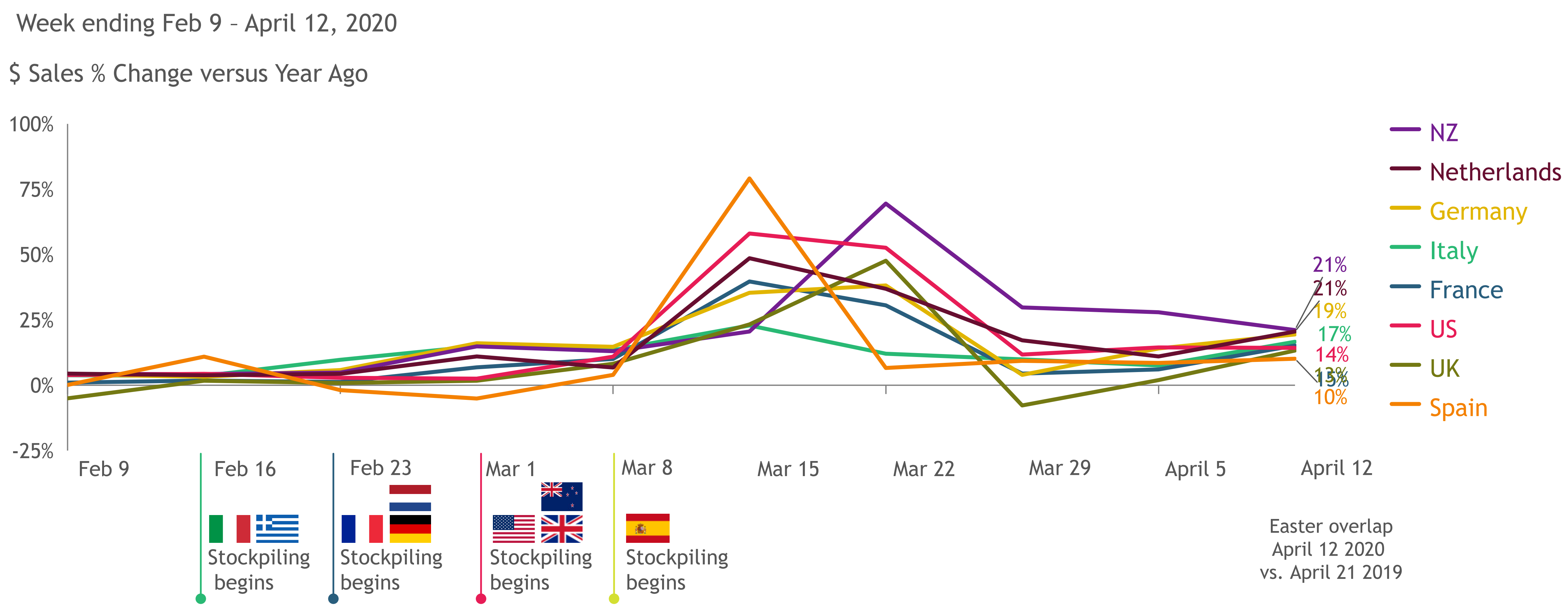
As of: 04.15.2020

COVID-19 related restrictions

	School closure	Restricted assembly	Non-essential business closure	Domestic travel restrictions	International travel restrictions	Non-essential local mvmt. restrictions
Italy	Mar 4	Mar 9	Mar 12	Mar 9	Mar 9	Mar 22
Greece	Mar 10	Mar 16	Mar 13	Mar 23	Mar 18	Mar 22
France	Mar 16	Mar 13	Mar 14		Mar 17	Mar 24
Germany	Mar 16	Mar 22	Mar 16		Mar 18	Mar 16
Netherlands	Mar 15	Mar 15	Mar 23		Mar 19	
New Zealand	Mar 23	Mar 19	Mar 23	Mar 25	Mar 19	Mar 25
UK	Mar 23	Mar 23	Mar 23	Mar 17	Mar 17	Mar 23
US	*by state*	Mar 16	*by state*		Mar 12	*by state*
Spain	*by region*	by region	*March 14*		Mar 16	Mar 14

Consumer spending tracking

Sales trends are slightly elevated to last week, but down significantly from peak



Note: Greece data not available due to holiday delays; will return in next report
Source: IRI POS data Week Ending April 12, 2020

Consumers in most countries are slowing purchasing in non-edible categories while maintaining elevated purchasing in Edible as shelter-in-place continues

% Change Most Recent Wk vs. Year ago, based on local currency

		Italy	France	Germany	Netherlands	NZ	UK	US	Spain
	TOTAL STORE	16.6%	15.1%	19.5%	20.5%	21.1%	13.2%	14.3%	10.1%
	Total Nonedible	-5.2%	6.2%	-2.3%	10.9%	-1.2%	-0.4%	-0.8%	-26.5%
	Total Edible	21.2%	16.7%	25.3%	21.7%	26.5%	17.1%	18.8%	19.8%
Nonedible	Paper Products	8.0%	3.4%	-7.9%	-3.0%	-14.3%	5.1%	38.9%	0.7%
Nonedible	Home Care	19.5%	18.6%	-0.2%	5.6%	11.6%	9.2%	10.9%	4.0%
Nonedible	OTC Healthcare	27.7%	10.4%	-8.9%	-8.9%	-18.8%	-1.0%	-9.4%	-36.0%
Nonedible	Personal Care	-4.2%	2.8%	-12.5%	25.9%	-10.6%	6.0%	-8.5%	-38.9%
Nonedible	Pet Food + Care	3.3%	-2.4%	-5.8%	-9.6%	-6.8%	-10.9%	-8.5%	-7.1%
Nonedible	Gen Merchandise	-37.7%	N/A	34.9%	27.1%	9.0%	-5.7%	2.6%	28.9%
Nonedible	Cosmetics	7.2%	-43.4%	4.0%	37.2%	16.0%	-22.9%	-12.3%	-83.4%
Edible	Beverage	11.8%	7.2%	10.9%	12.7%	13.5%	6.6%	-0.1%	6.2%
Edible	Packaged Food	21.6%	20.8%	27.6%	17.5%	28.4%	27.0%	25.6%	21.2%
Edible	Alcohol	30.0%	5.8%	24.8%	37.6%	36.7%	29.8%	26.6%	34.7%
Edible	Baby Food + Care	-10.1%	-11.0%	-24.1%	-9.6%	-25.8%	-22.2%	-16.6%	-33.4%
Edible	Dairy	32.0%	24.1%	26.0%	18.5%	24.0%	22.4%	31.9%	15.7%
Edible	Frozen Foods	37.4%	41.7%	41.5%	55.2%	51.2%	32.7%	31.0%	-7.1%
Edible	Fresh Foods	15.9%	13.2%	38.1%	-0.6%	14.7%	8.0%	15.7%	24.0%

Legend

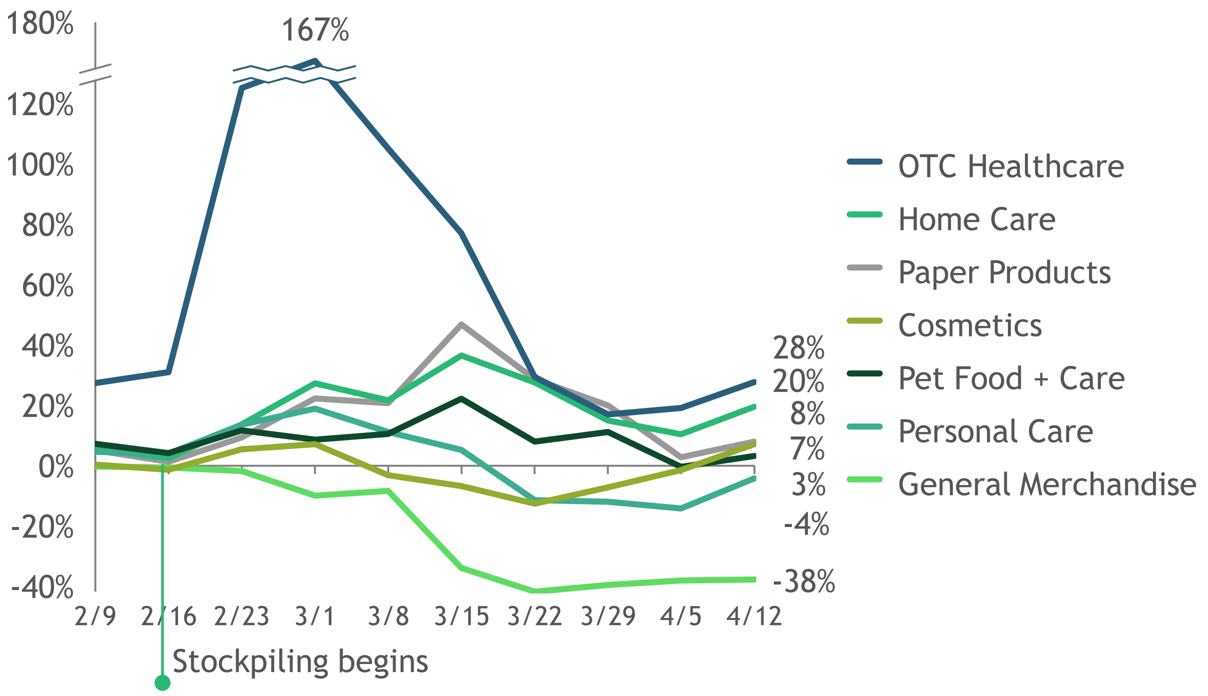
- 50%+
- 20% to 50%
- 10% to 20%
- 5% to 10%
- 0% to 5%
- -20% to 0%
- <-20%

Source: IRI POS data Week Ending April 12, 2020 vs year ago
Note: Exact product categorization varies slightly by country

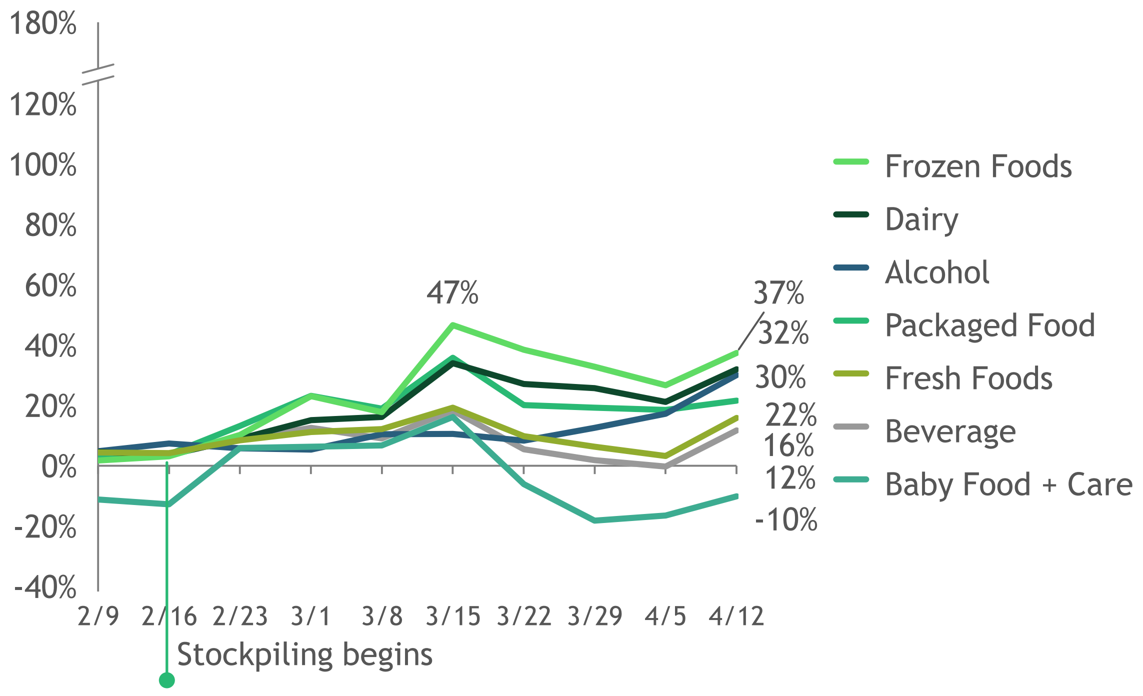
Italy: Consumers are moderating purchases of nonedibles excluding OTC and home care; edibles are still at elevated demand levels

Italy
Week ending Feb 9 – April 12 2020
€ Sales % Change versus Year Ago

Nonedible



Edible

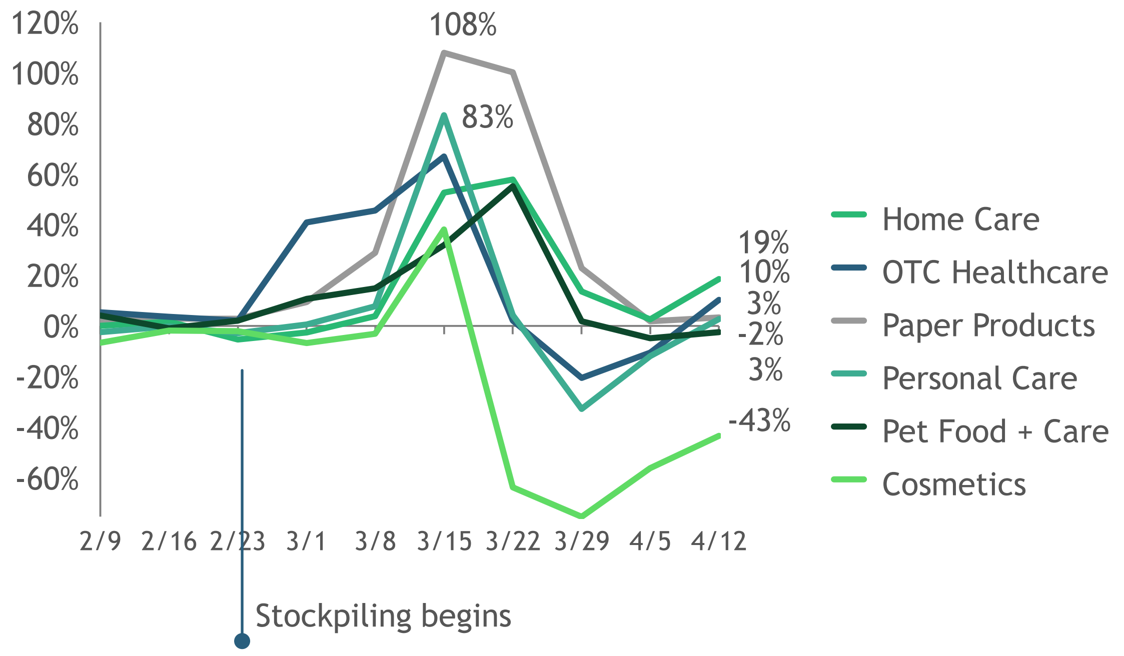


Note: Segments defined to evaluate representative companies
Source: IRI POS data Week Ending April 12, 2020

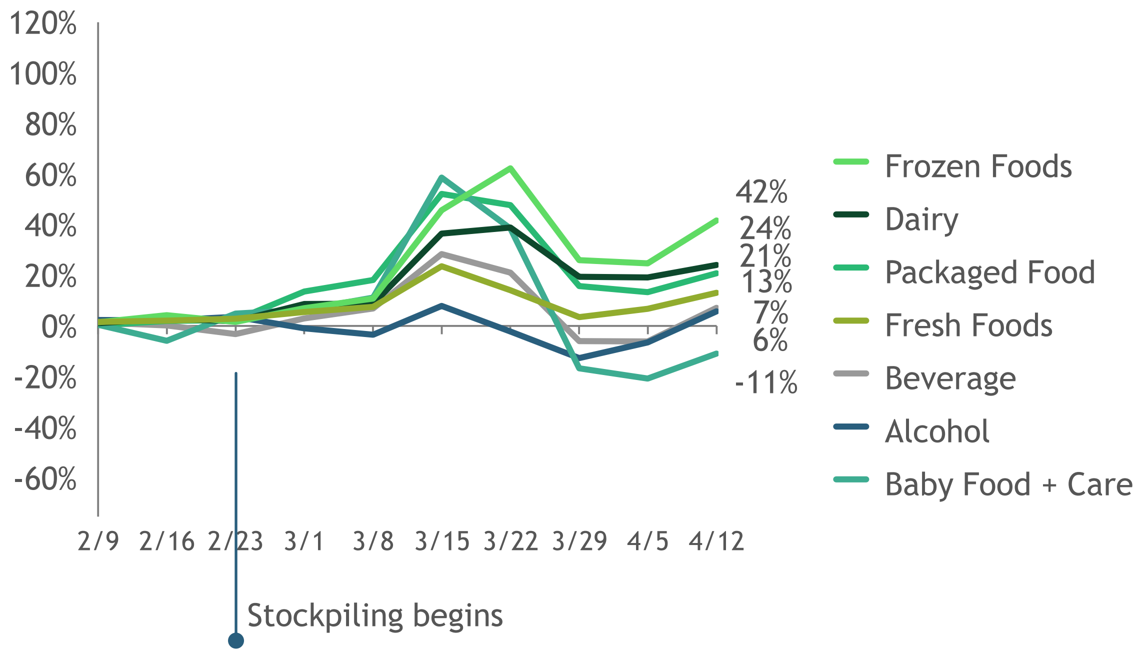
France: All categories see rise in recent weeks; edible remaining at higher levels vs. YA

France
Week ending Feb 9 – April 12 2020
€ Sales % Change versus Year Ago

Nonedible



Edible

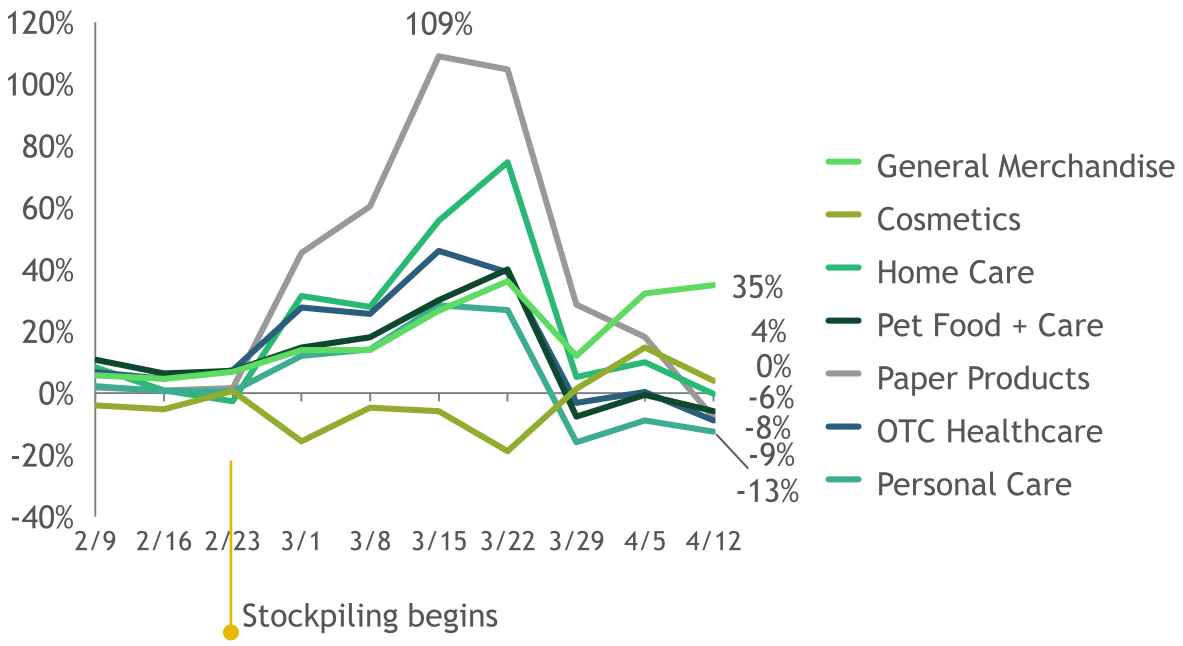


Note: Segments defined to evaluate representative companies
Source: IRI POS data Week Ending April 12, 2020

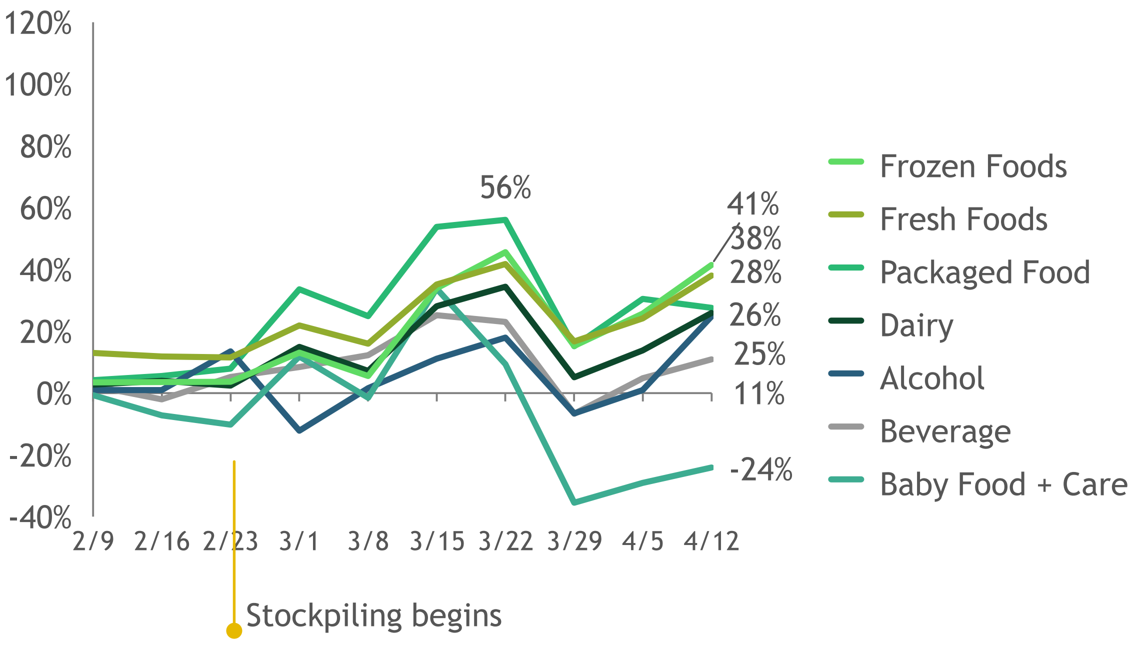
Germany: Nonedible categories seeing declines vs LY; edible categories maintaining strong growth levels

Germany
Week ending Feb 9 – April 12 2020
€ Sales % Change versus Year Ago

Nonedible



Edible

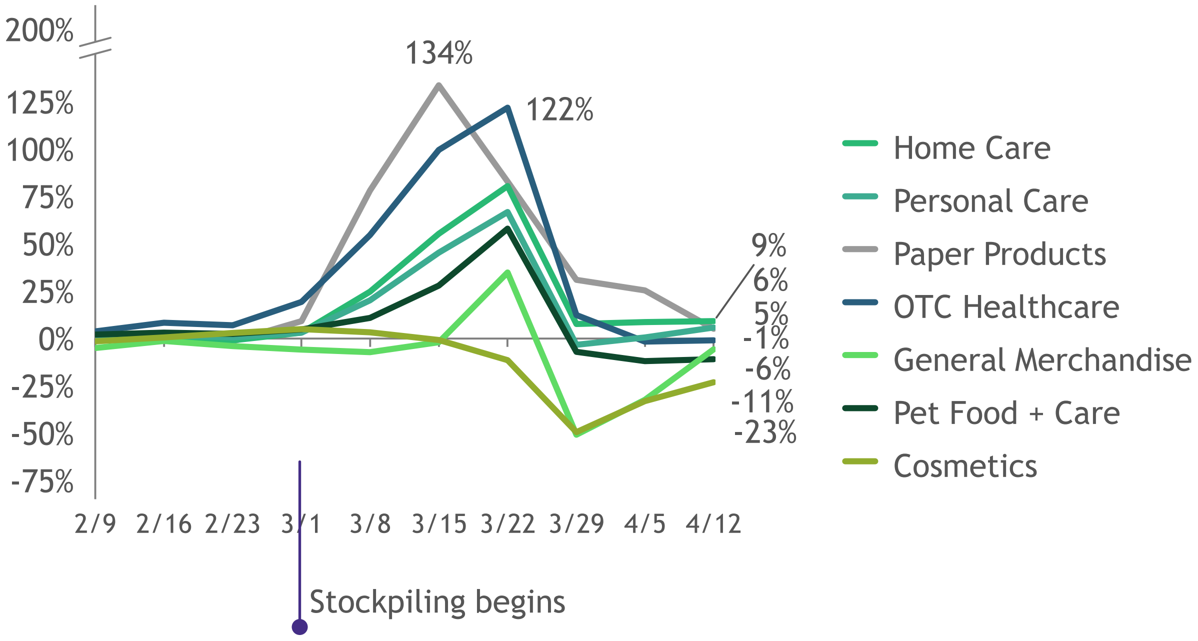


Note: Segments defined to evaluate representative companies
Source: IRI POS data Week Ending April 12, 2020

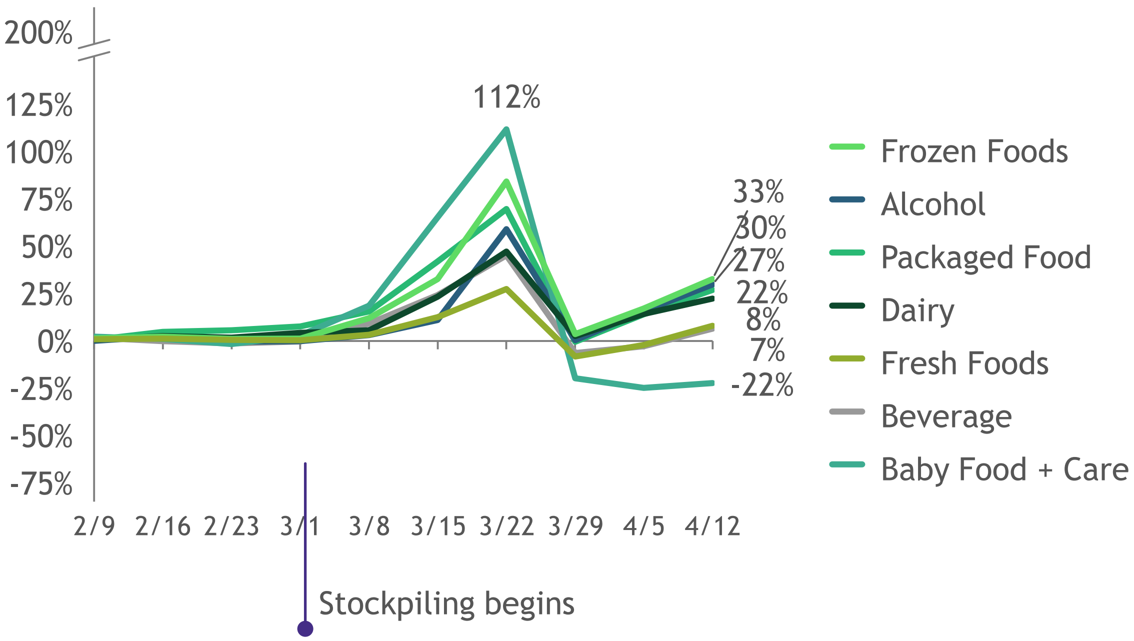
UK: Nonedible categories stabilize; Edible categories see uptick in latest week as stay-at-home continues

UK
Week ending Feb 9 – April 12 2020
£ Sales % Change versus Year Ago

Nonedible



Edible

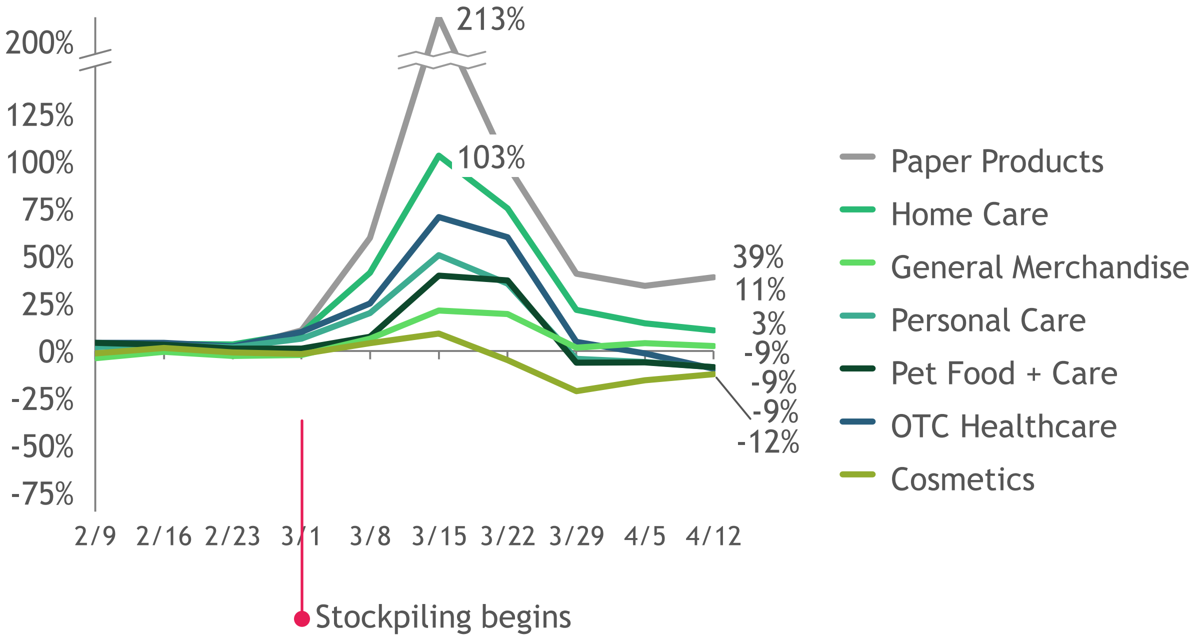


Note: Segments defined to evaluate representative companies
Source: IRI POS data Week Ending April 12, 2020

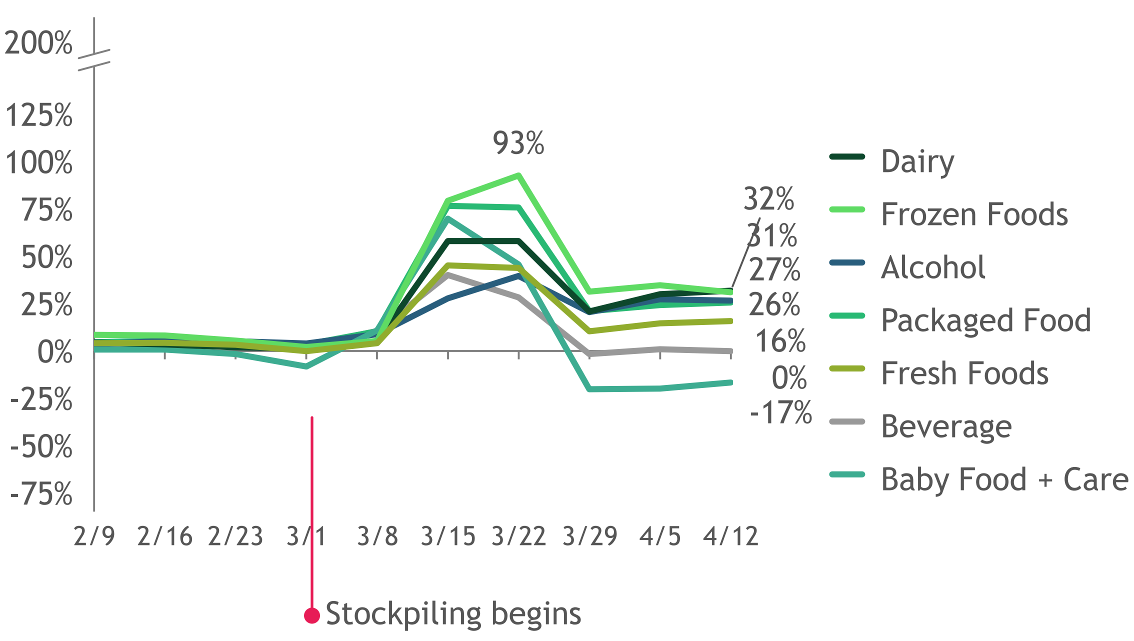
US: Paper products have leveled off but remains high vs. other nonedible; Edible categories flattening, but still strong growth vs prior year

US
Week ending Feb 9 – April 12 2020
$ Sales % Change versus Year Ago

Nonedible



Edible

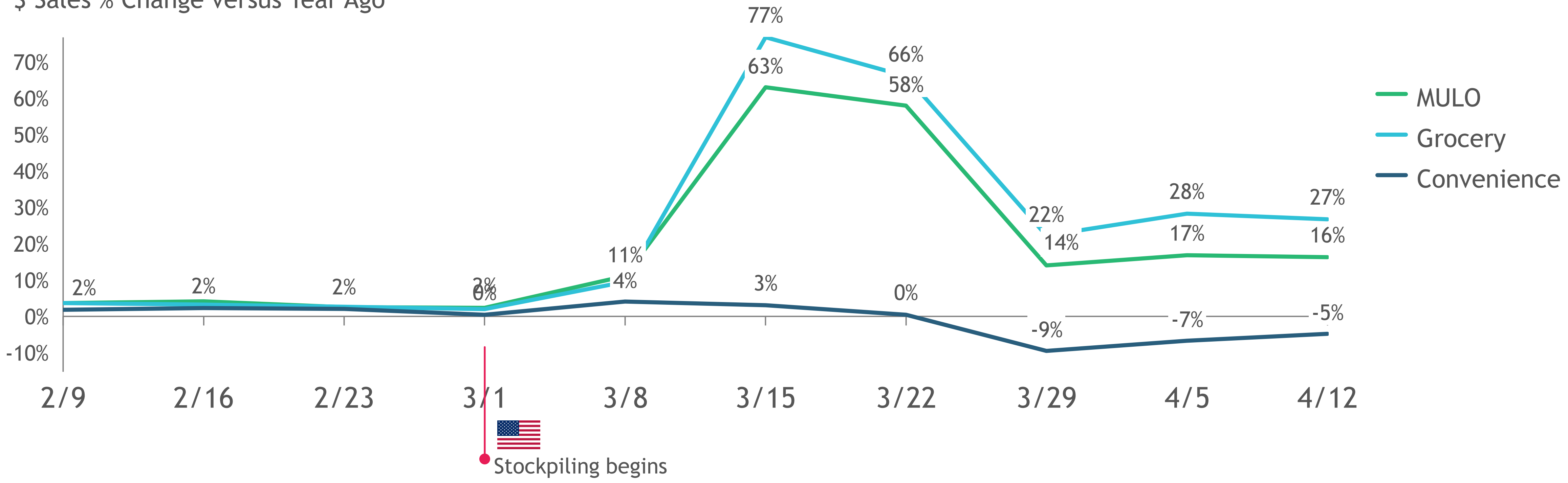


Note: Segments defined to evaluate representative companies
Source: IRI POS data Week Ending April 12, 2020

US: Convenience stores continue to take a hit, while Grocery accelerates as shelter in place continues

US
Week ending Feb 9 – April 12 2020

$ Sales % Change versus Year Ago

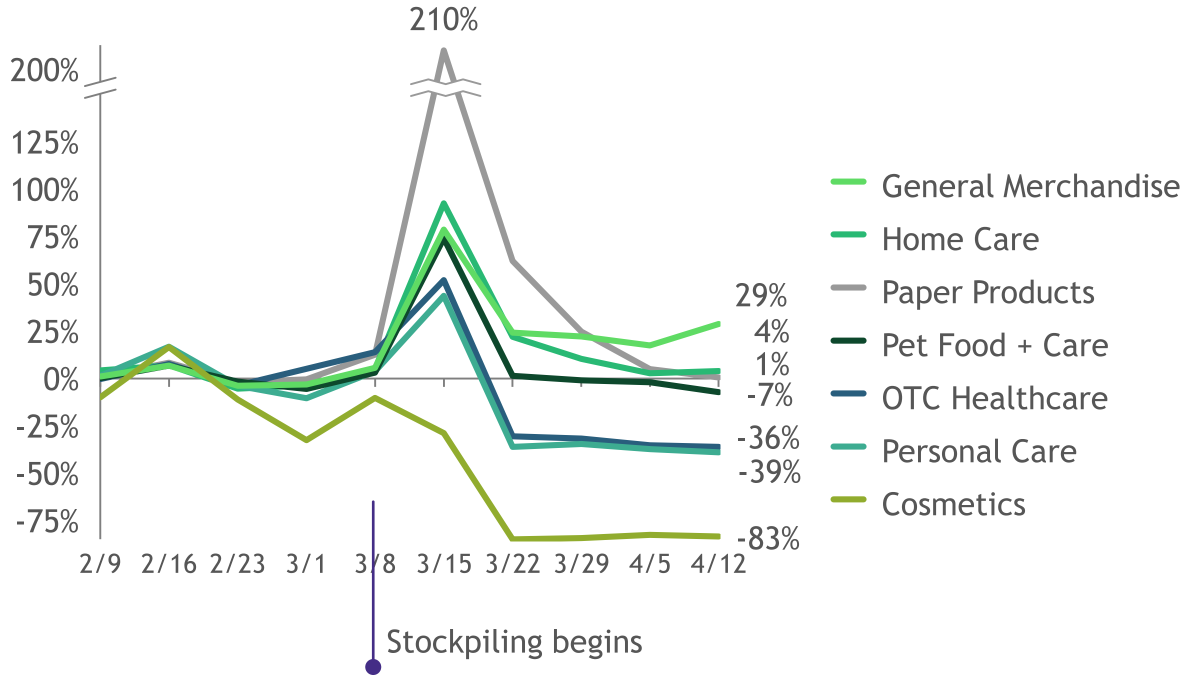


Source: IRI POS data Week Ending April 12, 2020
Note: MULO includes large format (Grocery, Mass, WM, Club xCostco, Dollar, DeCA); Convenience stores includes both chains and independent

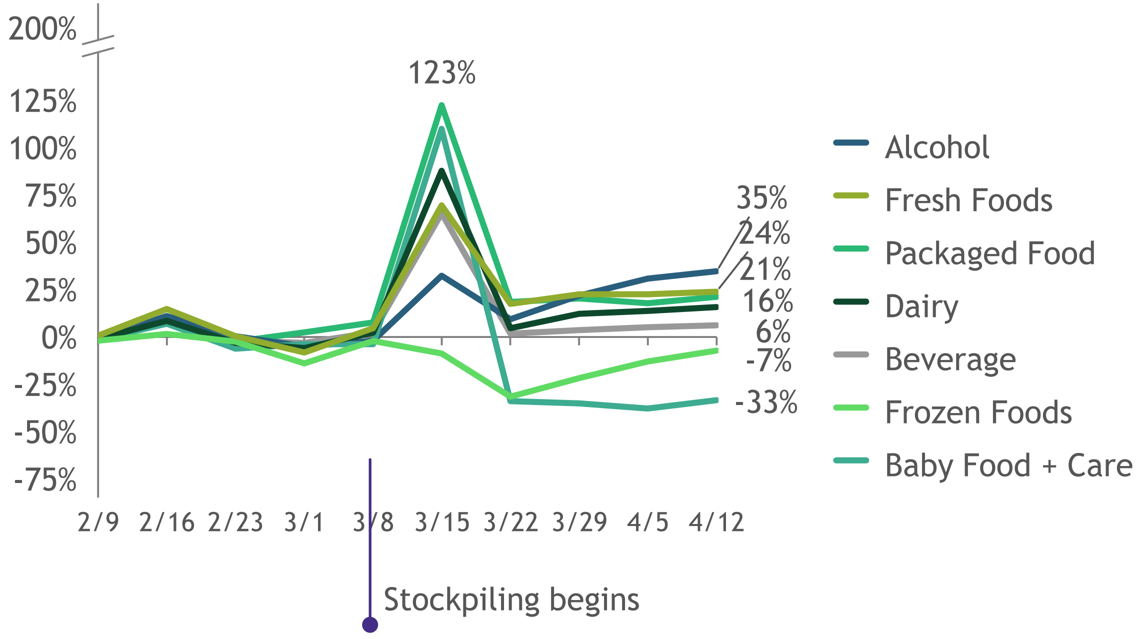
Spain: Sales across categories stabilize; edible remains elevated while non-edible show large declines

Spain
Week ending Feb 9 – April 12 2020
€ Sales % Change versus Year Ago

Nonedible



Edible



Note: Segments defined to evaluate representative companies
Source: IRI POS data Week Ending April 12, 2020

Top growing subcategories by country (Latest week)

Edible
Nonedible

Italy

Subcategory	% Chg
Mascarpone	177.4%
Lard	166.8%
Hair Coloring	160.6%
Other Chilled Products Gluten Free	149.2%
Brewer's Yeast & Ferments	146.1%
Flour	145.2%
Alcohol	141.6%
Oranges - Packaged	136.5%
Bechamel	135.5%
Shaving & Hair Removal	125.87

France

Subcategory	% chg
Cleaning Gloves	181.2%
Yeast and Flavored Sugar	169.2%
Flours	158.0%
Sun Care	144.1%
Hail Removals	120.9%
Ice cream Specialties Individual	103.3%
Fresh sausages	92.0%
Insecticides	89.5%
Hair Coloration	87.1%
Desserts Mixes	78.7%

Germany

Subcategory	% Chg
Hygiene- / Sanitary Cleaner	205.1%
Soil	157.9%
Ice Cream Confection	149.2%
Deep Frozen Fish	118.7%
Self Tanning	114.1%
Cooled Potato Dumplings / Fresh Dough	109.1%
Cooled Yeast	103.5%
Sun Protection / Care	97.5%
Damp Cleansing Tissues	96.8%
Chilled Fresh Dough	96.0%

UK

Subcategory	% Chg
Suncare	149.1%
Fresh Lamb	115.9%
Cider & Perry	83.7%
Beer	62.2%
Sausages	57.2%
Baking Products	54.9%
Other Fresh Meat	54.0%
Ice Cream & Desserts	52.5%
Foils & Wraps	46.6%
Cooking Products	45.5%

US

Subcategory	% Chg
Fz Cookie Dough	285.0%
Sugar/Calorie Reduced Soft Drinks	211.7%
Dry/Rfg Yeast	183.7%
Rfg Canned Ham	166.5%
Stuffing Mixes	160.0%
Cranberry Sauce	154.2%
Extract/Flavoring/Food Coloring	139.7%
Potato/Sweet Potato	137.2%
Ready-To-Use Pie Crust	132.8%
Non-Chocolate Easter Candy	124.4%

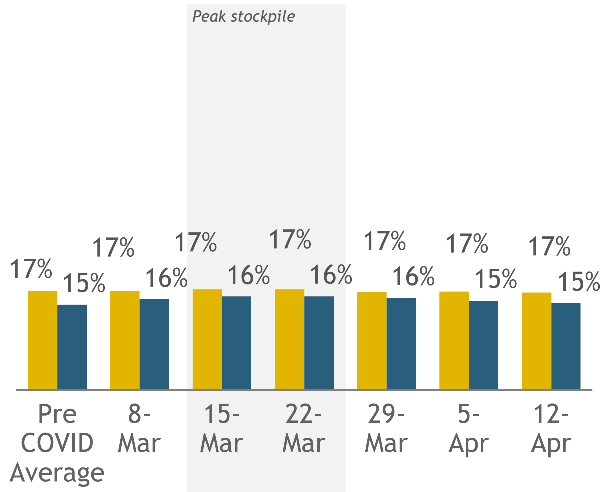
Source: IRI POS data Week Ending April 12, 2020 vs year ago.

Deep Dive: Private Label

Nonedible Private Label brands grew share during peak stockpiling then returned to normal

United States

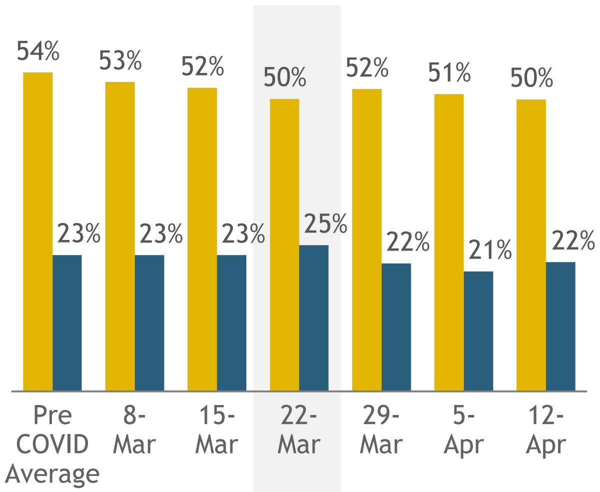
Private Label Dollar Share



	Pre COVID Average	8-Mar	15-Mar	22-Mar	29-Mar	5-Apr	12-Apr
Edible	0.2	0.3	1.0	1.1	0.7	0.6	0.7
Non edible	0.4	1.2	1.9	2.0	1.8	1.2	0.9

United Kingdom

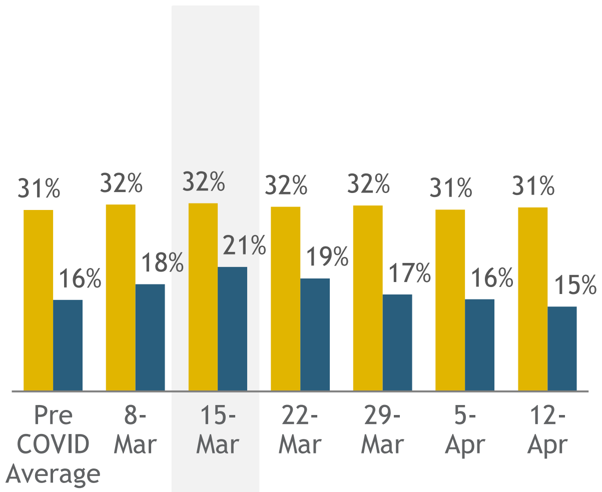
Private Label Dollar Share



	Pre COVID Average	8-Mar	15-Mar	22-Mar	29-Mar	5-Apr	12-Apr
Edible	-0.6	-1.3	-2.1	-3.9	-1.6	-2.5	-2.8
Nonedible	-0.5	-0.2	-0.1	1.6	-9.5	-5.6	-1.2

Netherlands

Private Label Dollar Share



	Pre COVID Average	8-Mar	15-Mar	22-Mar	29-Mar	5-Apr	12-Apr
Edible	0.0	1.0	0.4	0.0	0.3	-0.2	0.1
Nonedible	0.9	4.5	8.2	2.5	0.5	-0.6	-0.6

Private Label Share % Change vs YA

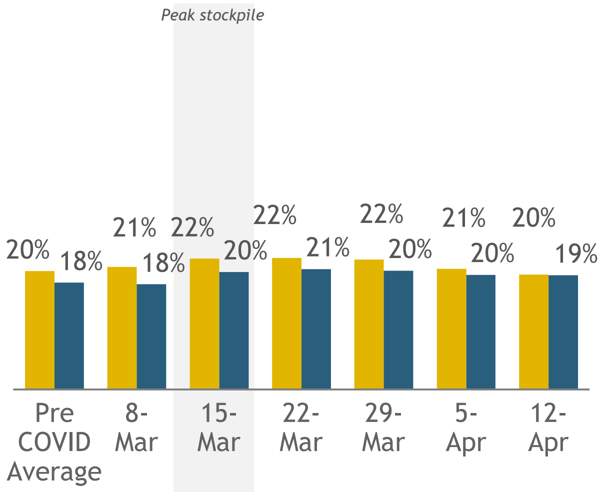
Edible Nonedible

Source: IRI POS data ending April 12, 2020

Nonedible Private Label brands grew share during peak stockpiling; In Spain, share remains elevated

Italy

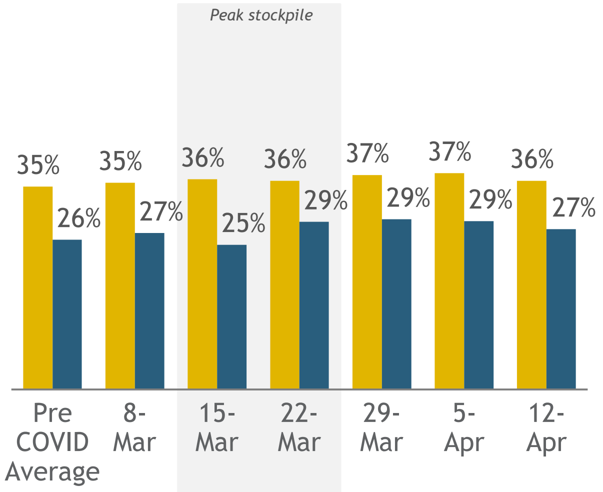
Private Label Dollar Share



	Pre COVID Average	8-Mar	15-Mar	22-Mar	29-Mar	5-Apr	12-Apr
Edible	0.5	1.1	1.2	2.1	1.8	1.7	0.9
Non edible	-0.2	0.3	-0.1	1.7	1.7	1.7	0.8

France

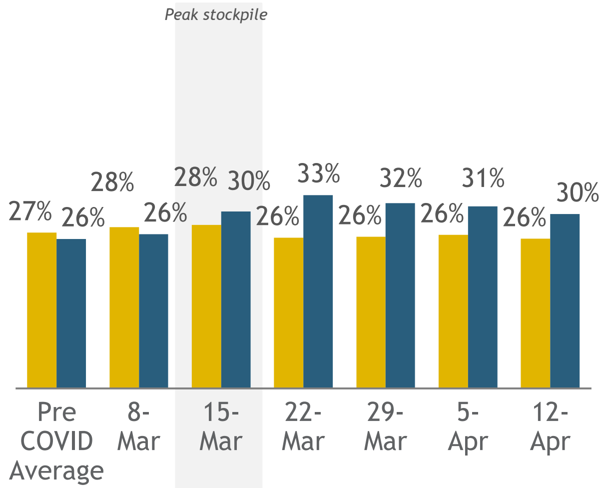
Private Label Dollar Share



	Pre COVID Average	8-Mar	15-Mar	22-Mar	29-Mar	5-Apr	12-Apr
Edible	0.1	0.5	1.0	1.4	1.5	1.7	1.7
Non edible	-0.4	1.1	-1.4	5.3	6.7	3.3	1.5

Spain

Private Label Dollar Share



	Pre COVID Average	8-Mar	15-Mar	22-Mar	29-Mar	5-Apr	12-Apr
Edible	0.5	0.9	1.6	-0.7	-0.9	-0.7	-1.0
Non edible	-0.3	1.3	5.6	8.6	6.2	5.9	5.1

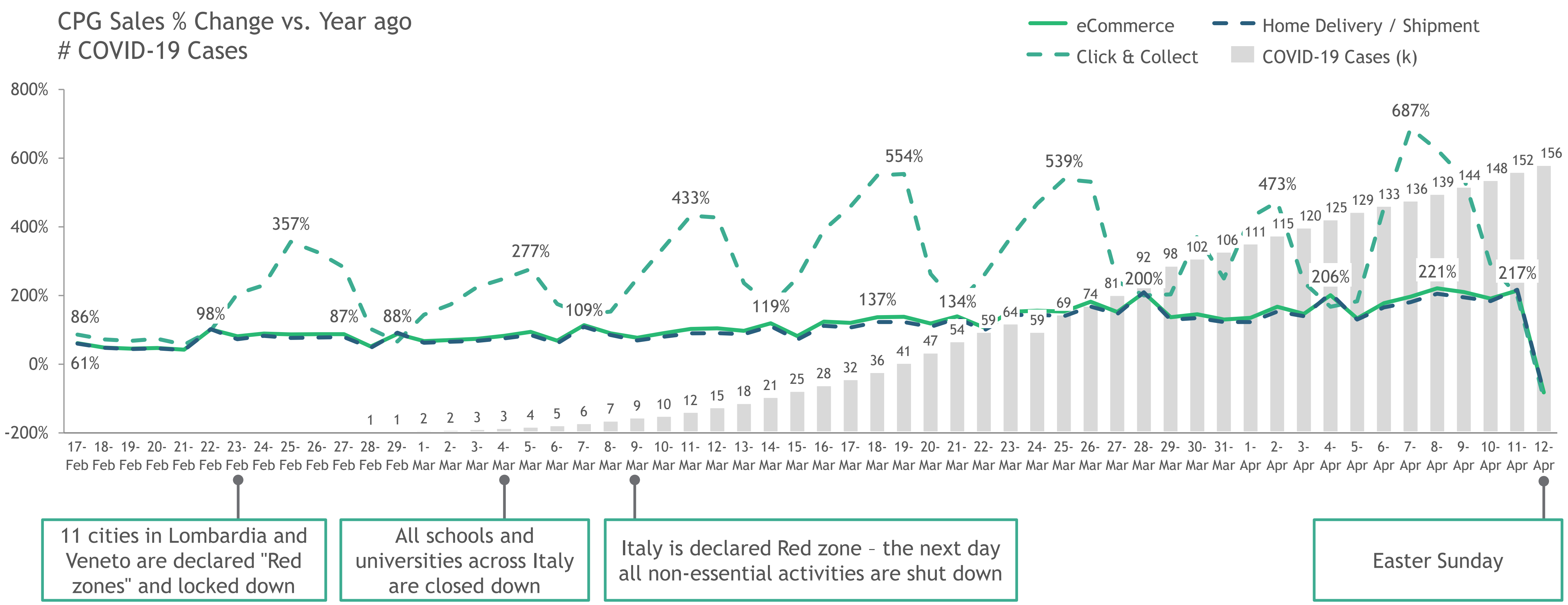
Private Label Share % Change vs YA

Edible Nonedible

Source: IRI POS data ending April 12, 2020

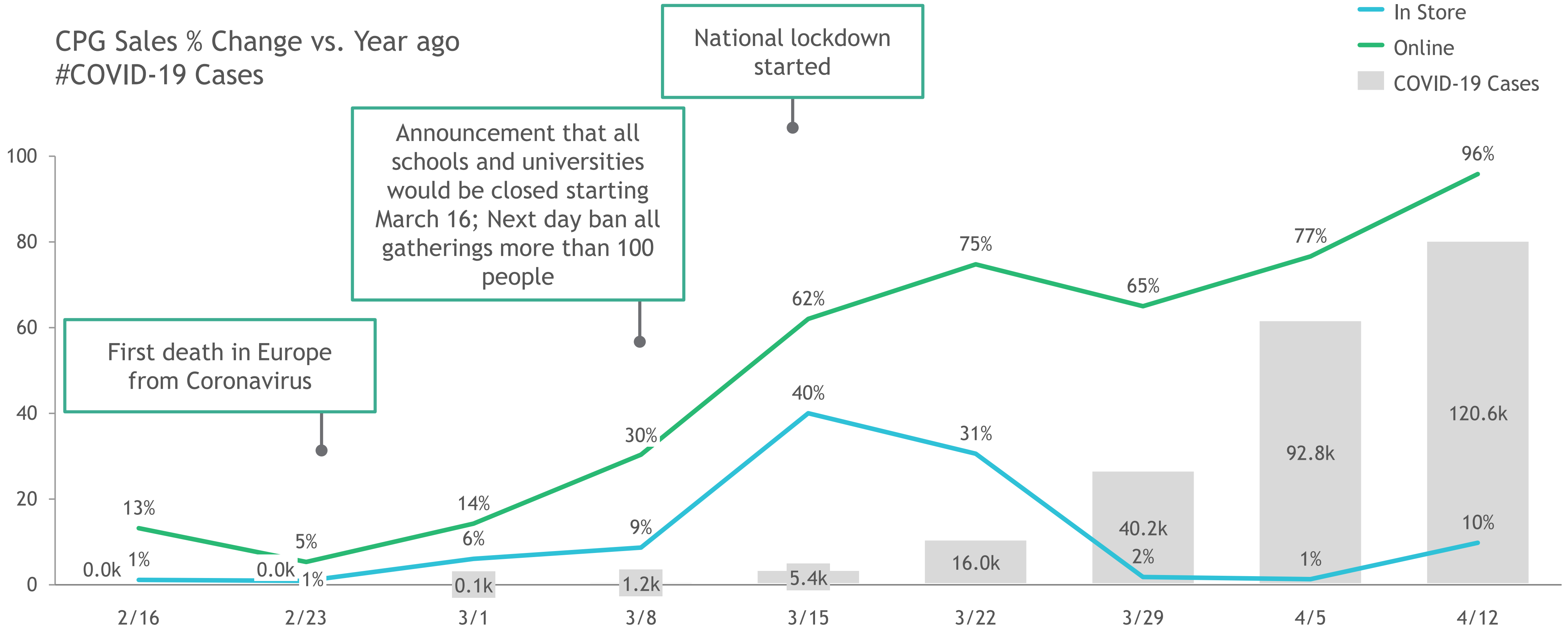
Deep Dive: Ecommerce trends in Italy, France, and Spain

Italy saw more Click & Collect growth in the days leading up to Easter



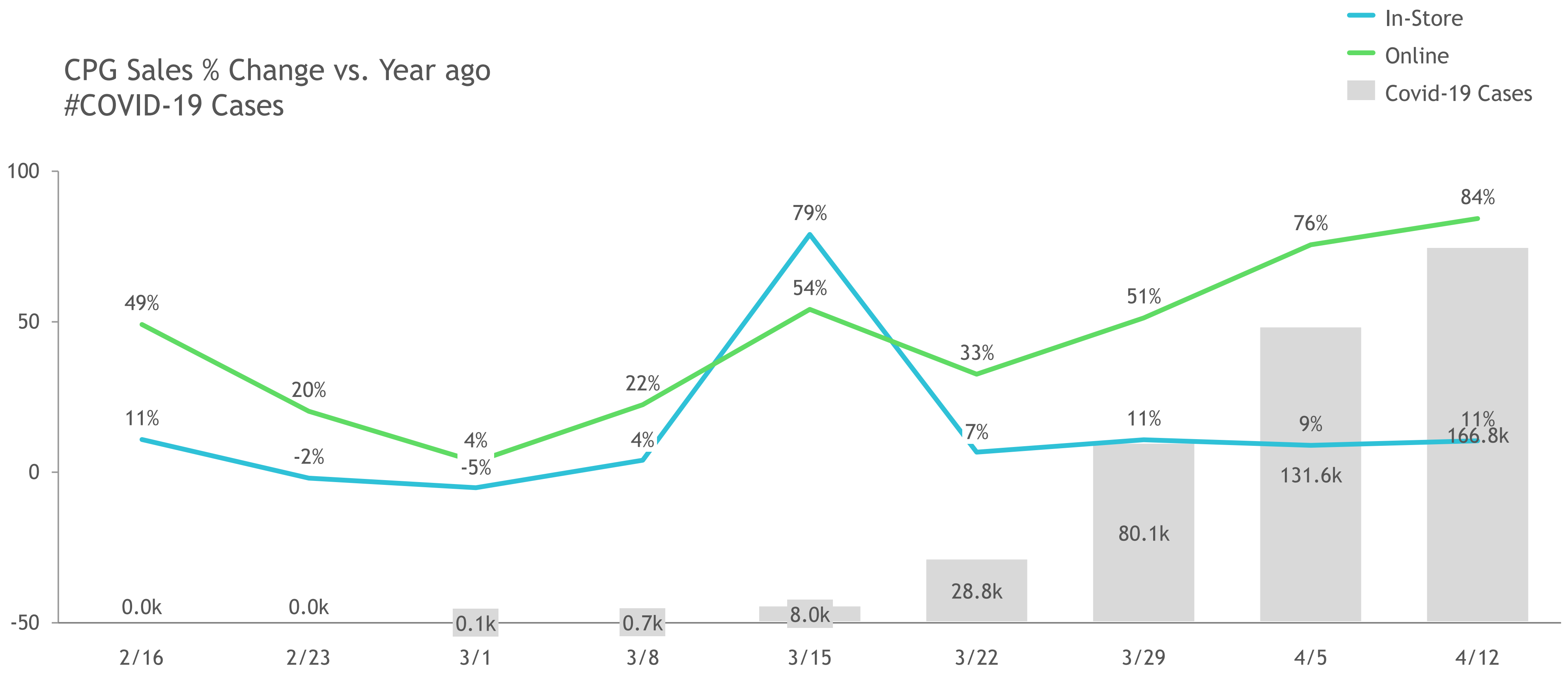
Note: eCommerce Includes select eCommerce retailers including Amazon, other local eRetailers and the eCommerce operations of traditional Brick & Mortar retailers Home delivery / shipment: goods delivered at doorstep of purchaser, Click & Collect: purchaser submit order online and collects in store, accounts for 9% of total eCommerce.
Source: IRI Panel online, Dates reflect Monday, 17 February through Sunday 12 April, 2020. Worldometer as of April 20, 2020.

France| Consumers continue to shift to eCommerce purchasing vs. in store as COVID-19 cases increase



Note: eCommerce includes Click & Collect and some Home Delivery providers (Home Delivery represents a small portion of sales). Excludes Amazon.
Source: IRI POS Data Week Ending April 12, 2020. Worldometer as of April 22, 2020

Spain| Consumers shopped in-store and online to load their pantries, but shift to more online after

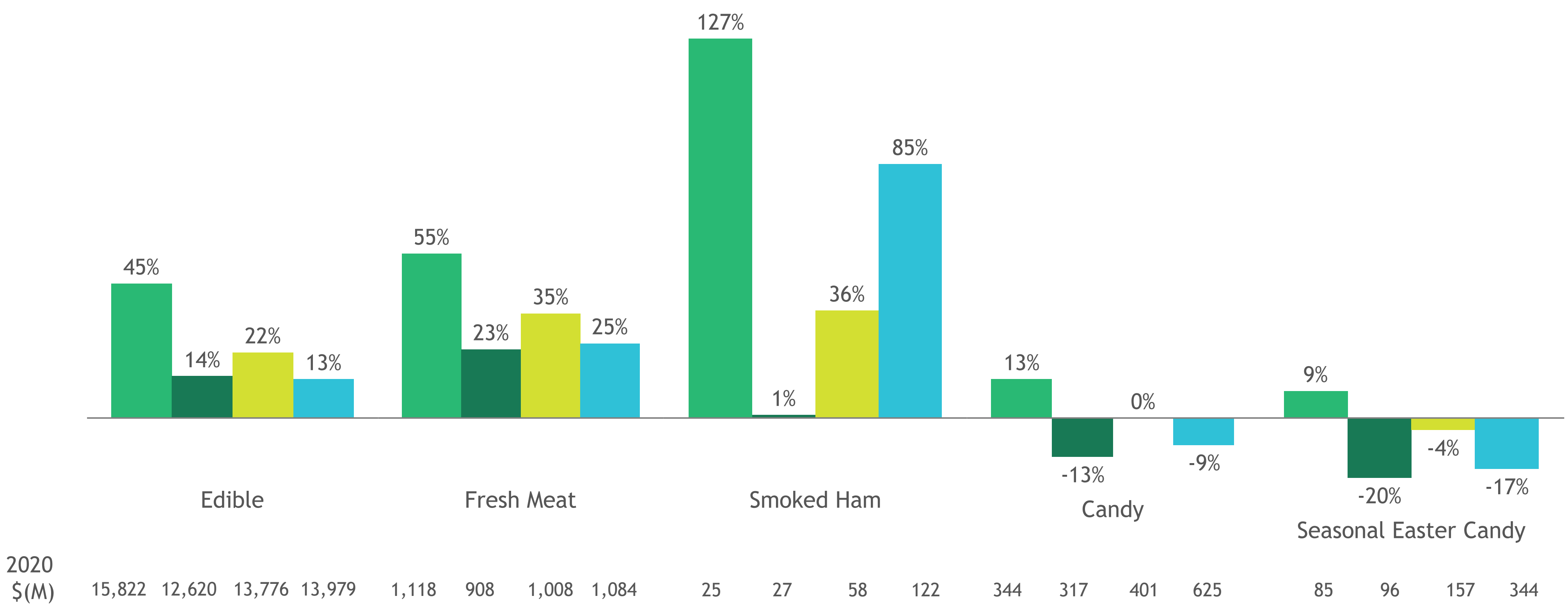


Note: eCommerce includes Brick & mortar retailers that deliver online orders to customer homes and Amazon.
Source: IRI POS Data Week Ending April 12, 2020. Worldometer as of April 22, 2020

Deep Dive: Easter

US: With varying pressures on Easter celebrations, consumers spent more on proteins and less on candy vs. YA

$ Sales % Change versus Year Ago



COVID Stock-up week avg.
2 Weeks Prior to Easter
Week Prior to Easter
Easter Week

Pressures on Easter 2020

Earlier in month holiday benefits from larger wallets beginning of month

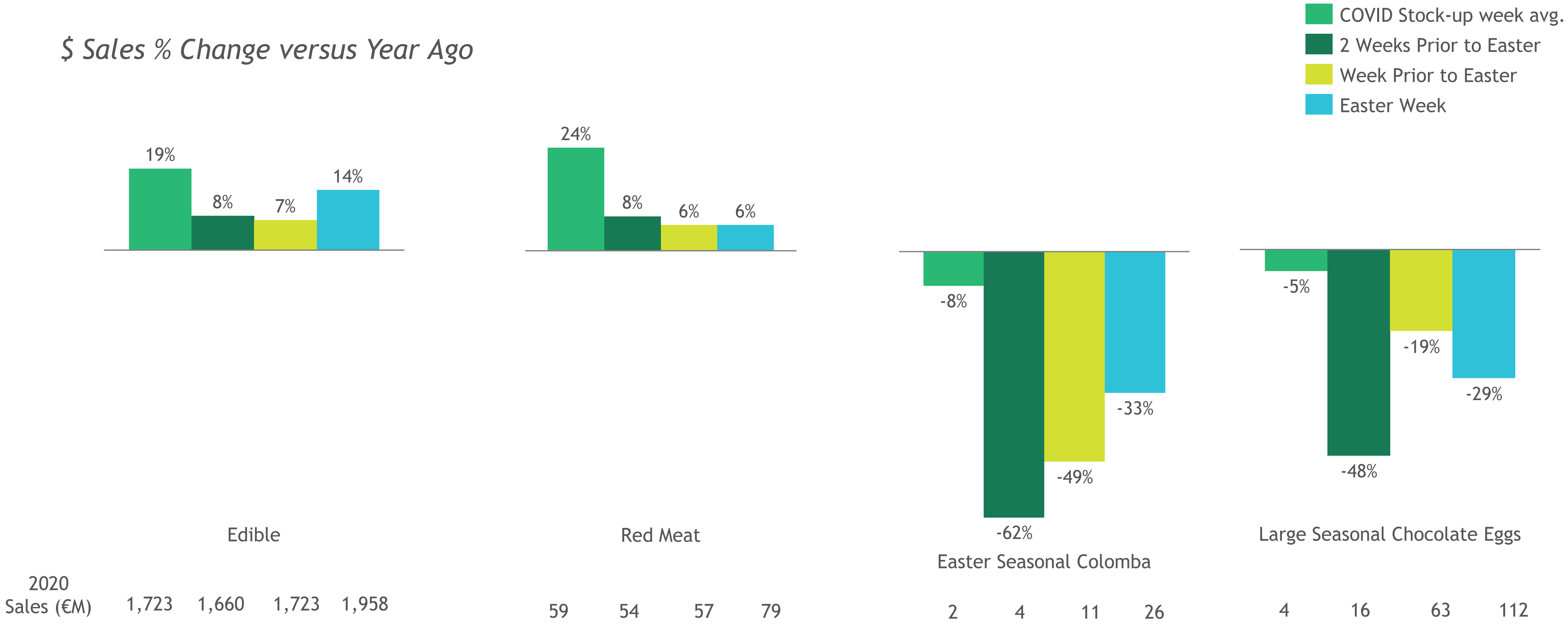
Consumers seek comfort and normalcy during quarantine

Celebration purchases mostly for household members; Fewer parties and gifting

COVID-related unemployment and concerns over income limit spending

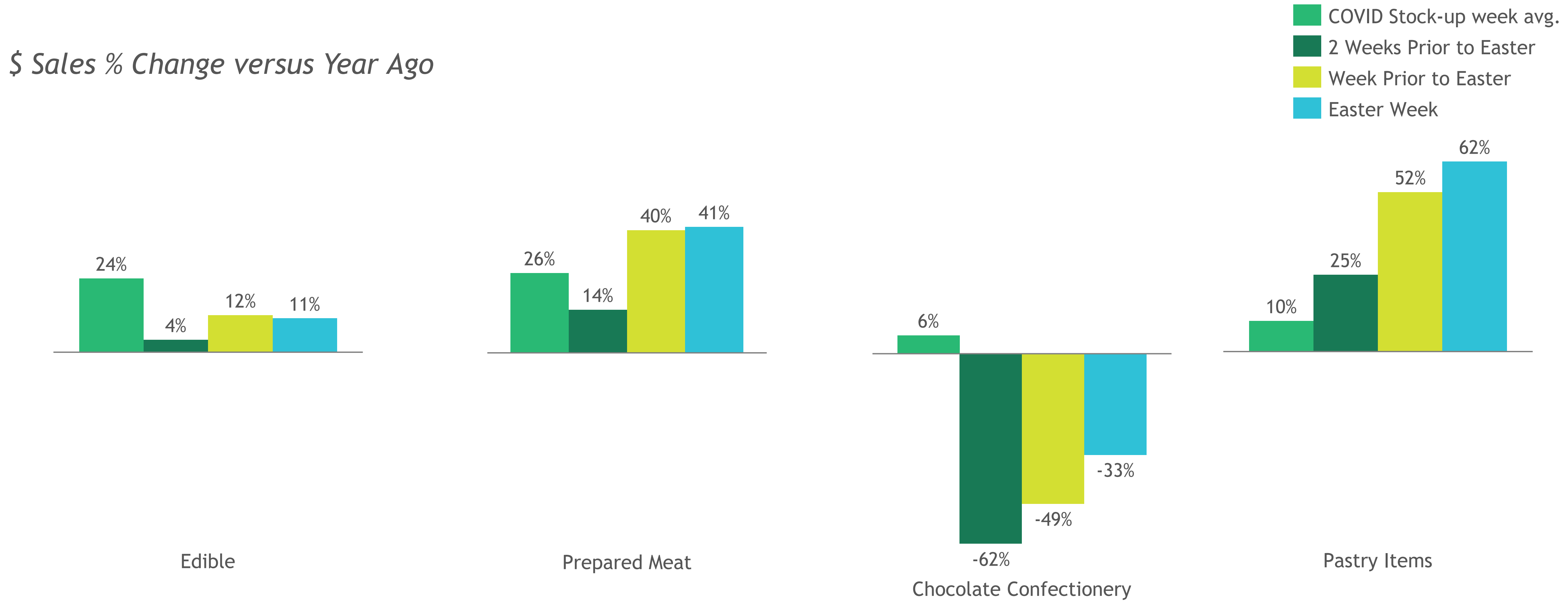
Note: Easter Week refers to week ending 4/12/20, Easter Week 2019 refers to week ending 4/21/19. COVID stock-up week average refers to average of 3 weeks ending 3/22/20. *Figure for COVID stock-up week avg. compares to same time period year ago. Candy refers to Chocolate and Non-Chocolate CandySource: IRI POS data Week Ending April 12, 2020

Italy: Increases in Meat offset declines in candy resulting in overall Edible growth vs. last year's Easter holiday



Note: Easter Week refers to week ending 4/12/20, Easter Week 2019 refers to week ending 4/21/19. COVID stock-up week average refers to average of 3 weeks ending 3/22/20.
**Figure for COVID stock-up week avg. compares to same time period year ago. Source: IRI POS data ending 4/12/20.*

France: Increases in Meat & Pastry offset declines in candy resulting in overall Edible growth vs. last year's Easter holiday



2020 Sales (€M)				
Edible	2,119	1,842	1,923	2,008
Prepared Meat	12	12	13	14
Chocolate Confectionery	23	22	27	35
Pastry Items	8	9	11	13

Note: Easter Week refers to week ending 4/12/20, Easter Week 2019 refers to week ending 4/21/19. COVID stock-up week average refers to average of 3 weeks ending 3/22/20.
**Figure for COVID stock-up week avg. compares to same time period year ago. Source: IRI POS data ending 4/12/20.*

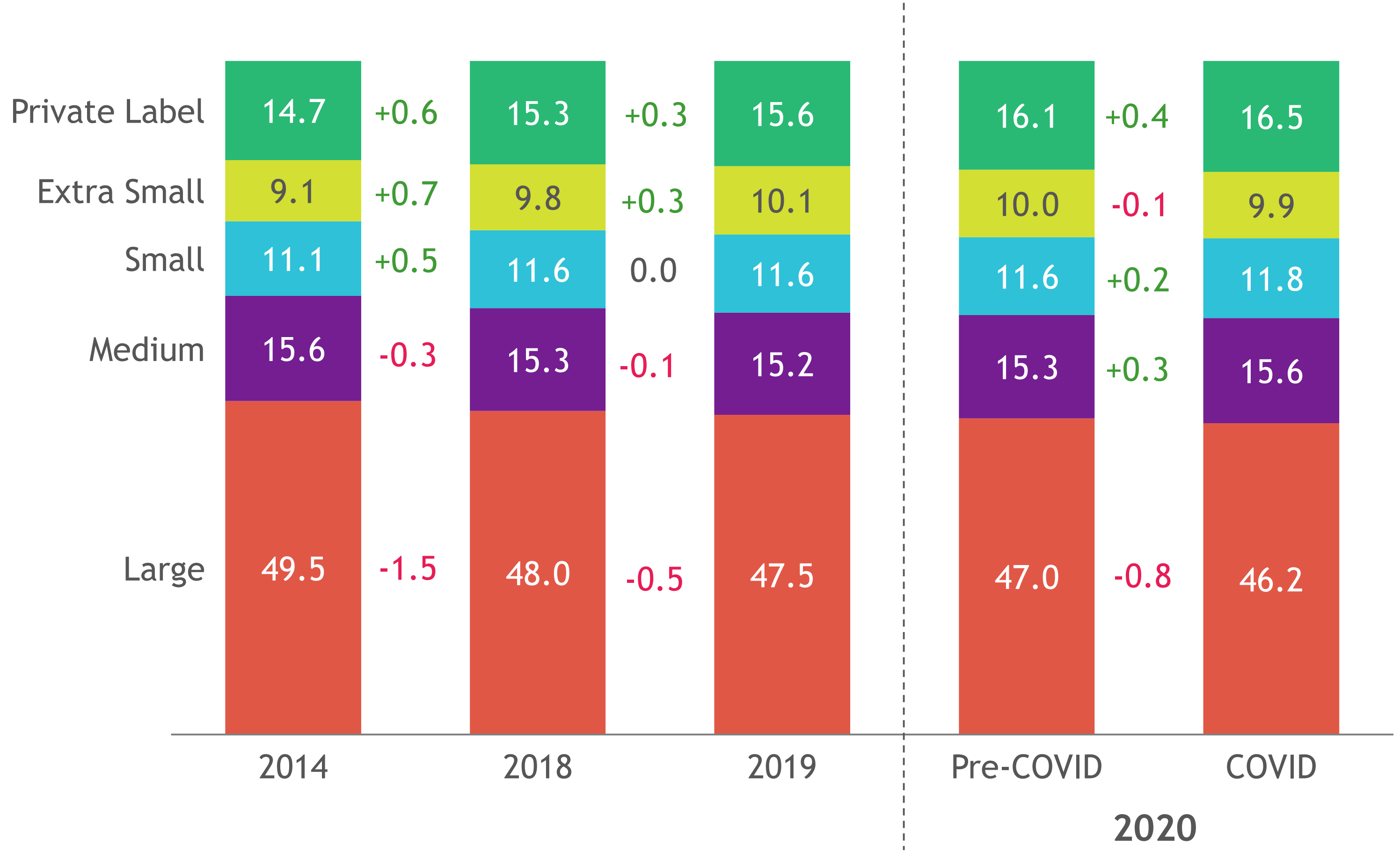
UK: Declines in Candy & lamb were offset by gains in rolls, resulting in overall flat Edible sales vs. last year's Easter holiday

Note: Easter Week refers to week ending 4/11/20, Easter Week 2019 refers to week ending 4/20/19. COVID stock-up week average refers to average of 3 weeks ending 3/21/20.
**Figure for COVID stock-up week avg. compares to same time period year ago. Source: IRI POS data ending 4/11/20.*

Deep Dive: Growth Leaders

Large Manufacturers continued to lose share to Mid-size and Smaller manufacturers and Private Label in 2020

*% Share of **Total Store** Sales by CPG Manufacturer Size*



Manufacturer COVID performance

- Greater boost to players in primary COVID stock-up categories (paper products, soap, disinfecting cleaners, shelf stable food)
- Less acceleration for manufacturers with greater presence in Convenience channel (Beverages particularly Energy Drinks, Alcohol)
- Lower growth for those impacted by greater out-of-stocks (e.g., #1 brands) and closed manufacturing facilities (e.g., meat)

Note: Large is $5.5B+ in L52W, Medium $1-5.5B, Small $100M-1B and Extra Small <$100M. Pre-COVID is 8 weeks ending 2/23/20, COVID is 7 weeks ending 4/12/20.
Source: IRI POS data Total US MULO+C ending 4/12/20.

Appendix

Data methodology and notes

Methodology

- IRI tracks POS data weekly (weeks end on Sundays) and has ~one week of required processing time (ecommerce has ~2 weeks processing time)
- US National Consumer Panel data is released monthly
- Tracker will be released weekly on Wednesday/Thursday as data is available; deep dives will be refreshed periodically

France Data
- Data collected in hypermarkets, supermarkets, discount, Convenience stores and e-shopping

Germany Data
- Includes hypermarkets, supermarkets, and drug stores

Italy Data
- Excludes Open Air Markets estimated at 6% of total FMCG sales

New Zealand Data
- Represents Grocery channel
- Point of Sale data accounting for 100% of Pre-packaged Grocery sales

UK Data
- Aggregated sales across major grocery retailers

Spain Data
- Includes Hypermarkets & supermarkets >100M and modern drug stores

US Data
- Represents transaction POS database (accounts for 80%+ of FMCG sales)
- Data collected in Multi-Outlet + Convenience (MULOC) channels: Grocery, Drug, Convenience, Mass, Walmart, Club, Dollar, and DECA Stores
- Excludes Costco

Greece Data
- Represents transaction POS database, excludes random weight
- Data collected in Super/Hyper Markets channels. Excludes Convenience Stores, Small Retail, Discounters and Cash & Carry

Netherlands Data
- Data collected for Supermarket including online

Italy: Largest subcategories[1] weekly growth vs. last year – Nonedible

Group	Dept	% Chg
Paper Products	Hygienic Products/ Toilet Paper	3.7%
Paper Products	Disposable / Kitchen Rolls	30.6%
Paper Products	Disposable / Napkins	9.4%
Home Care	Laundry - Washing Machine Detergents	-8.1%
Home Care	Disposable / Table Accessories	-8.2%
Home Care	Laundry Softeners	1.7%
Home Care	Small Surfaces Detergents	49.4%
Home Care	Auto Dishwasher Detergent	24.6%
OTC Healthcare	Parapharma / First Aid Medication	36.5%
OTC Healthcare	Parapharma / Other	20.7%
OTC Healthcare	Parapharma / Diagnostic	-7.6%

Group	Dept	% Chg
Personal Care	Oral Hygiene / Toothpaste	-4.8%
Personal Care	Personal Hygiene / Bath & Shower Gel	-1.0%
Personal Care	Personal Hygiene / Deodorants	-25.6%
Pet Food + Care	Pet Care Cats - Nutrition	2.2%
Pet Food + Care	Pet Care Dog - Nutrition	3.4%
Pet Food + Care	Pet Care Cats - Litters	3.0%
General Merchandise	Cell Phones And Accessorie	-37.9%
General Merchandise	Toys	-61.3%
General Merchandise	Stationery	-3.9%
Cosmetics	Hair Shampoo	-3.6%
Cosmetics	Hair Coloring	160.6%
Cosmetics	Hair Conditioner-Treatment	0.4%

1 – Based on Prior 52 Weeks Sales Ending April 12, 2020
Source: IRI POS data Week Ending April 12 , 2020 vs year ago.

Italy: Largest subcategories[1] weekly growth vs. last year – Edible

Group	Dept	% Chg
Beverage	Still Water	-0.9%
Beverage	Coffee Minced	17.2%
Beverage	Cola	26.6%
Beverage	Tea	-0.8%
Beverage	Natural Sparkling Water	13.0%
Packaged Food	Biscuits	13.8%
Packaged Food	Sweet Snacks	-5.0%
Packaged Food	Tunafish In Oil	14.4%
Packaged Food	Pasta	6.6%
Packaged Food	Extra Olive Oil	14.1%
Alcohol	Beer Alcohol	42.4%
Alcohol	Wine - Italian Doc	29.8%
Alcohol	Wine - Italian Igp	37.4%
Alcohol	Brown Spirits	7.2%

Group	Dept	% Chg
Baby Food + Care	Baby Care / Diapers	-14.4%
Baby Food + Care	Homogenized	4.1%
Baby Food + Care	Baby Care / Wipes	-6.9%
Dairy	Mature Cheese - Rw	15.9%
Dairy	Milk Uht	30.3%
Dairy	Mozzarella	63.7%
Dairy	Hen Eggs	68.9%
Dairy	Parmesan Cheese	32.5%
Frozen Foods	Natural Vegs & Fruits	32.3%
Frozen Foods	Multipack Ice Creams	39.5%
Frozen Foods	Natural Fish	48.2%
Fresh Foods	Red Meat - Rw	46.1%
Fresh Foods	Sliced Cold Cuts	27.4%
Fresh Foods	Fish - Rw	1.3%

1 – Based on Prior 52 Weeks Sales Ending April 12, 2020
Source: IRI POS data Week Ending April 12 , 2020 vs year ago.

France: Largest subcategories[1] weekly growth vs. last year – Nonedible

Group	Dept	% Chg
Paper Products	Toilet Paper	-0.3%
Paper Products	All-purpose Paper Towels	17.4%
Paper Products	Tissues and Paper	-5.8%
Home Care	Laundry Cleaners Normal	-9.7%
Home Care	Multipurpose Household Cleaners	41.0%
Home Care	Garbage Bags	22.8%
Home Care	Machine Dishwashing Liquid	34.9%
Home Care	Hand Dishwashing	23.7%
OTC Healthcare	Parapharmacy Accessories	58.1%
OTC Healthcare	Diet Suppliments	-17.8%
OTC Healthcare	Health Products for Shape	11.0%

Group	Dept	% Chg
Personal Care	Shower Gels	1.0%
Personal Care	Toothpastes	-10.2%
Personal Care	Deodorants	-19.9%
Pet Food + Care	Humid Food For Cat	-2.3%
Pet Food + Care	Dry Cat Food	-9.0%
Pet Food + Care	Dry Food For Dogs	0.1%
Cosmetics	Cosmetics	-43.4%

1 – Based on Prior 52 Weeks Sales Ending April 12, 2020
Source: IRI POS data Week Ending April 12 , 2020 vs year ago.

France: Largest subcategories[1] weekly growth vs. last year – Edible

Group	Dept	% Chg
Beverage	Natural Mineral water	-5.2%
Beverage	Fruit juice	6.3%
Beverage	Colas	13.3%
Beverage	Coffee Pod	17.5%
Beverage	Roasted Coffee	5.3%
Packaged Food	Chocolate Bars	43.7%
Packaged Food	Chocolate Confectionery	35.6%
Packaged Food	Industrial Viennoiserie	9.9%
Packaged Food	Cooking Oil	33.6%
Packaged Food	Pasta	8.2%
Alcohol	Whiskey	2.8%
Alcohol	Speciality Blonde Beers	27.9%
Alcohol	Speciality Beers	32.4%
Alcohol	Anise	11.9%

Group	Dept	% Chg
Baby Care	Diapers	-13.3%
Baby Care	Baby Food	-3.2%
Baby Care	Milk For Baby	-16.6%
Dairy	Yogurts	15.7%
Dairy	Milk	12.1%
Dairy	Hard cheese	34.7%
Dairy	Butters	28.2%
Dairy	Eggs	46.1%
Frozen Foods	Ice cream Specialities Individual	103.3%
Frozen Foods	Frozen meats	45.0%
Frozen Foods	Frozen Fish	74.8%
Fresh Foods	Cooked ham and shoulder	27.1%
Fresh Foods	Fresh desserts	6.9%
Fresh Foods	Prepared poultry	41.3%

1 - Based on Prior 52 Weeks Sales Ending April 12, 2020
Source: IRI POS data Week Ending April 12 , 2020 vs year ago.

Germany: Largest subcategories[1] weekly growth vs. last year – Nonedible

Group	Dept	% Chg
Paper Products	Dry Toilet Paper	-13.9%
Paper Products	Kitchen Rolls	-3.9%
Paper Products	Paper Tissues	-3.0%
Home Care	Heavy Duty Detergents	-18.3%
Home Care	Maschine Dishwashing Detergent	4.0%
Home Care	Fabric Softner	-16.4%
Home Care	Hygiene- / Sanitary Cleaner	205.1%
Home Care	All Purpose Cleaner	14.4%
OTC Healthcare	Cold Medicine	-16.6%
OTC Healthcare	Dry Mineral Products	-11.8%
OTC Healthcare	Dry Vitamin Products	-7.7%

Group	Dept	% Chg
Personal Care	Hair Shampoo	-20.8%
Personal Care	Face Care	-22.0%
Personal Care	Toothpaste	-27.4%
Pet Food + Care	Wet Cat Food	-6.9%
Pet Food + Care	Dry Dog Food	4.8%
Pet Food + Care	Dry Cat Food	-5.5%
Gen Merch	Phone Cards	57.1%
Gen Merch	Air Freshener	-0.9%
Gen Merch	Soda Stream Sparkling Systems	33.4%
Cosmetics	Hair Colour / Blonding	25.8%
Cosmetics	Cleansing Milk /- Cream /- Oil	-26.0%
Cosmetics	Hair Tint	18.9%

1 – Based on 2020 Sales YTD
Source: IRI POS data Week Ending April 12 , 2020 vs year ago.

Germany: Largest subcategories[1] weekly growth vs. last year – Edible

Group	Dept	% Chg
Beverage	Roasted Coffee	-6.1%
Beverage	Healing-/ Table -/ Mineral Water	1.8%
Beverage	Cola / Cola Mixed Refreshing Beverages	35.5%
Beverage	Fruit Juice	28.4%
Beverage	Liquid Sports Beverages	20.9%
Packaged Food	Nuts / Kernels / Trail Mix	19.5%
Packaged Food	Chocolate Bars	13.1%
Packaged Food	Sausages In Aspic Shelf	17.6%
Packaged Food	Candies / Confectionaries	26.4%
Packaged Food	Noodles	24.5%
Alcohol	Beer / Alcoholfree Beer	28.1%
Alcohol	Wine	18.2%
Alcohol	Clear Schnapps	13.8%
Alcohol	Liquor	30.0%

Group	Dept	% Chg
Baby Care	Baby Diapers	-30.2%
Baby Care	Liquid/Dry Babynutrition With/Without Milk	-28.0%
Baby Care	Baby - Cleansing Tissues	-22.5%
Dairy	Cheese	23.9%
Dairy	Firm Joghurt	10.8%
Dairy	Eggs	47.1%
Dairy	Butter / Butter Preparations	26.3%
Dairy	Homogenised Milk	9.8%
Frozen Foods	Deep Frozen Pizza / Baguette / Piquant Dough Products	-2.0%
Frozen Foods	Deep Frozen Semifinished Foods All Types	23.8%
Frozen Foods	Ice Cream	84.8%
Fresh Foods	Chilled Sausages In Aspic	47.9%
Fresh Foods	Bread	11.8%
Fresh Foods	Ready To Eat Desserts	12.3%

1 – Based on 2020 Sales YTD
Source: IRI POS data Week Ending April 12 , 2020 vs year ago.

UK: Largest subcategories[1] weekly growth vs. last year – Nonedible

Group	Dept	% Chg
Paper Products	Household Paper	5.1%
Home Care	Detergents/Laundry	4.5%
Home Care	Household Sundries	1.2%
Home Care	Cleaning Products	40.9%
OTC Healthcare	Medicines	-4.1%
OTC Healthcare	VMS & Nutrition	15.1%

Group	Dept	% Chg
Personal Care	Haircare	7.8%
Personal Care	Oral Hygiene	-8.0%
Personal Care	Deos & Personal Wash	26.3%
Pet Food + Care	Petfood	-11.1%
Pet Food + Care	Pet Non Food	-8.7%
Gen Merch	Housewares	-27.2%
Gen Merch	Garden & Flowers	20.5%
Gen Merch	Newspapers & Magazines	-24.4%
Cosmetics	Cosmetics & Fragrances	-22.9%

1 - Based on Prior 52 Weeks Sales Ending April 12, 2020
Source: IRI POS data Week Ending April 12 , 2020 vs year ago.

UK: Largest subcategories[1] weekly growth vs. last year – Edible

Group	Dept	% Chg
Beverage	Soft Drinks	7.2%
Beverage	Hot Beverages	4.9%
Packaged Food	Confectionery	36.8%
Packaged Food	Crisps, Snacks & Nuts	4.7%
Packaged Food	Biscuits	5.5%
Packaged Food	Cooking Products	45.5%
Packaged Food	Breakfast Cereals	6.0%
Alcohol	Wine	11.9%
Alcohol	Spirits	25.4%
Alcohol	Beer	62.2%
Alcohol	Cider & Perry	83.7%

Group	Dept	% Chg
Baby Care	Baby Care	-19.8%
Baby Care	Baby Food	-25.1%
Dairy	Fresh Milk	7.2%
Dairy	Cheese	30.3%
Dairy	Butters, Fats & Margarines	35.2%
Dairy	Eggs	23.0%
Dairy	Milk, Topping & Whiteners	27.7%
Frozen Foods	Frozen Vegetables	29.1%
Frozen Foods	Ice Cream & Desserts	52.5%
Frozen Foods	Other Frozen	17.3%
Fresh Foods	Fruit	13.1%
Fresh Foods	Bread & Cakes	8.4%
Fresh Foods	Vegetables	21.1%

1 - Based on Prior 52 Weeks Sales Ending April 12, 2020
Source: IRI POS data Week Ending April 12 , 2020 vs year ago.

US: Largest subcategories[1] weekly growth vs. last year – Nonedible

Group	Dept	% Chg
Paper Products	Toilet Tissue	43.3%
Paper Products	Paper Towels	41.1%
Paper Products	Facial Tissue	16.3%
Home Care	Liquid Laundry Detergent	-13.2%
Home Care	Cleaning Tools/Mops/Brooms	11.8%
Home Care	Home Air Fresheners	2.3%
Home Care	Manual Dish Detergent	41.6%
Home Care	Other Laundry Detergent (Packet/Bar)	0.7%
OTC Healthcare	Cold/Allergy/Sinus Tablets/Packets	-10.6%
OTC Healthcare	Internal Analgesic Tablets	-0.9%
OTC Healthcare	Mineral Supplements	-3.2%
OTC Healthcare	Weight Control/Nutritionals Liq/Pwd	-18.5%
OTC Healthcare	Antacid Tablets	-9.4%

Group	Dept	% Chg
Personal Care	Deodorants	-19.8%
Personal Care	Toothpaste	-12.3%
Personal Care	Liquid Body Wash/All Other	2.9%
Pet Food + Care	Dry Dog Food	-19.1%
Pet Food + Care	Dog Biscuits/Treats/Beverages	2.9%
Pet Food + Care	Dog/Cat Needs	-2.1%
General Merchandise	Disposable Plates/Bowls	20.8%
General Merchandise	Household/Kitchen Storage	-1.0%
General Merchandise	Garbage/Trash/Lawn&Leaf Bags	14.1%
Cosmetics	Regular Shampoo	-10.9%
Cosmetics	Hair Conditioner/Creme Rinse	-1.7%
Cosmetics	Hair Accessories	22.2%

1 - Based on Prior 52 Weeks Sales Ending April 12, 2020
Source: IRI POS data Week Ending April 12 , 2020 vs year ago.

US: Largest subcategories[1] weekly growth vs. last year – Edible

Group	Dept	% Chg
Beverage	Regular Soft Drinks	8.7%
Beverage	Convenience/Pet Still Water	-22.8%
Beverage	Ss Energy Drinks Non-Aseptic	-8.1%
Beverage	Low Calorie Soft Drinks	9.7%
Beverage	Ss Sports Drinks Non-Aseptic	-12.3%
Packaged Food	Cookies	7.5%
Packaged Food	Ready-To-Eat Cereal	21.6%
Packaged Food	Potato Chips	10.6%
Packaged Food	Tortilla/Tostada Chips	17.5%
Packaged Food	All Other Crackers	6.9%
Alcohol	Domestic Beer/Ale (Inc Non-Alcoholic)	22.3%
Alcohol	Domestic Table/Still Wine	27.7%
Alcohol	Imported Beer/Ale (Inc Non-Alcoholic)	21.1%
Alcohol	Spirits	39.5%

Group	Dept	% Chg
Baby Food + Care	Baby Formula - Powder	-9.3%
Baby Food + Care	Disposable Diaper	-28.4%
Baby Food + Care	Baby Food/Snacks	-9.7%
Dairy	Rfg Skim/Lowfat Milk	20.4%
Dairy	Rfg Yogurt	-4.2%
Dairy	Fresh Eggs	70.5%
Dairy	Natural Cheese-Shredded	62.0%
Dairy	Rfg Whole Milk	26.2%
Frozen Foods	Ice Cream	32.8%
Frozen Foods	Fz Pizza	45.8%
Frozen Foods	Fz Novelties	15.7%
Fresh Foods	Perimeter	14.2%
Fresh Foods	Fresh Bread	24.1%
Fresh Foods	Rfg Uncooked Meats (No Poultry)	35.0%

1 - Based on Prior 52 Weeks Sales Ending April 12, 2020
Source: IRI POS data Week Ending April 12 , 2020 vs year ago.

COVID-19 Disclaimer

The situation surrounding COVID-19 is dynamic and rapidly evolving, on a daily basis. Although we have taken great care prior to producing this presentation, it represents BCG and IRI's view at a particular point in time. This presentation is not intended to: (i) constitute medical or safety advice, nor be a substitute for the same; nor (ii) be seen as a formal endorsement or recommendation of a particular response. As such you are advised to make your own assessment as to the appropriate course of action to take, using this presentation as guidance. Please carefully consider local laws and guidance in your area, particularly the most recent advice issued by your local (and national) health authorities, before making any decision.