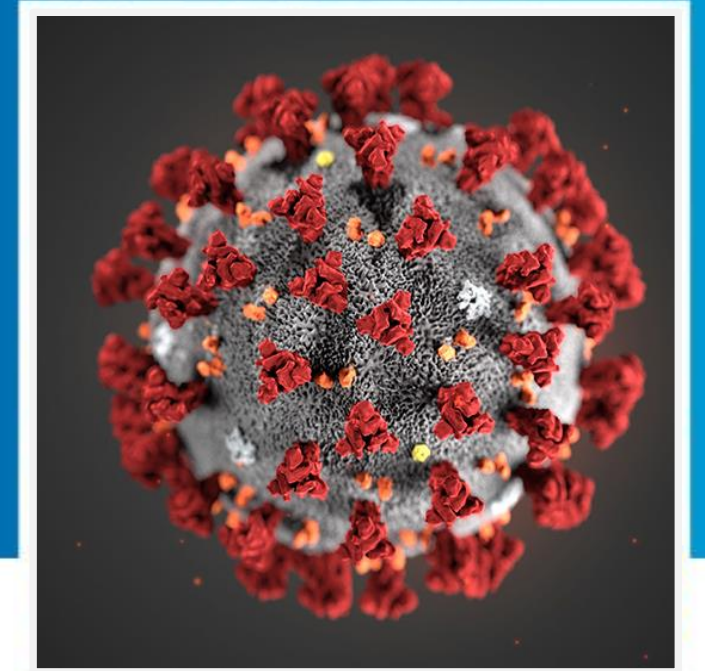


IRI Corona Tracker

The coronavirus and its effects on the FMCG industry

26.03.2020



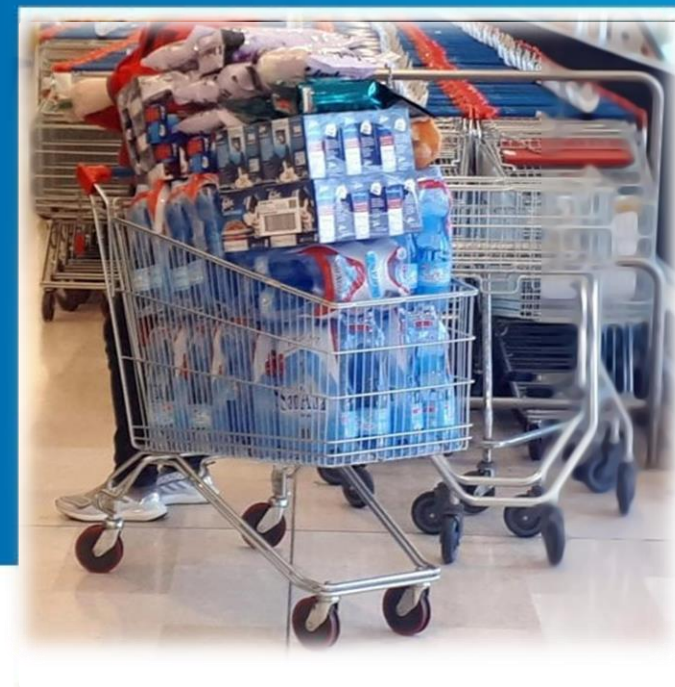
IRi

Growth delivered.

IRI Corona Tracker

Total FMCG Germany

Weekly value sales

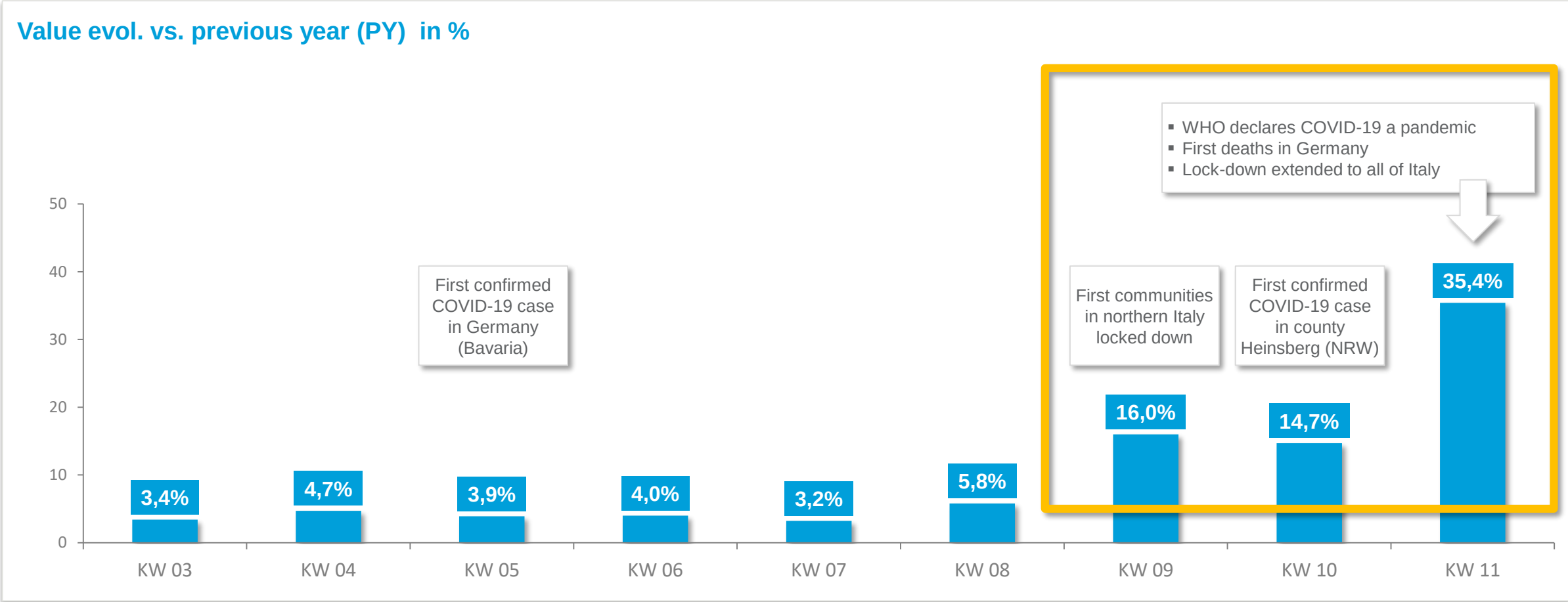


IRi

Growth delivered.

Another significant increase of FMCG sales in calendar week 11 (“Hamsterkäufe”)

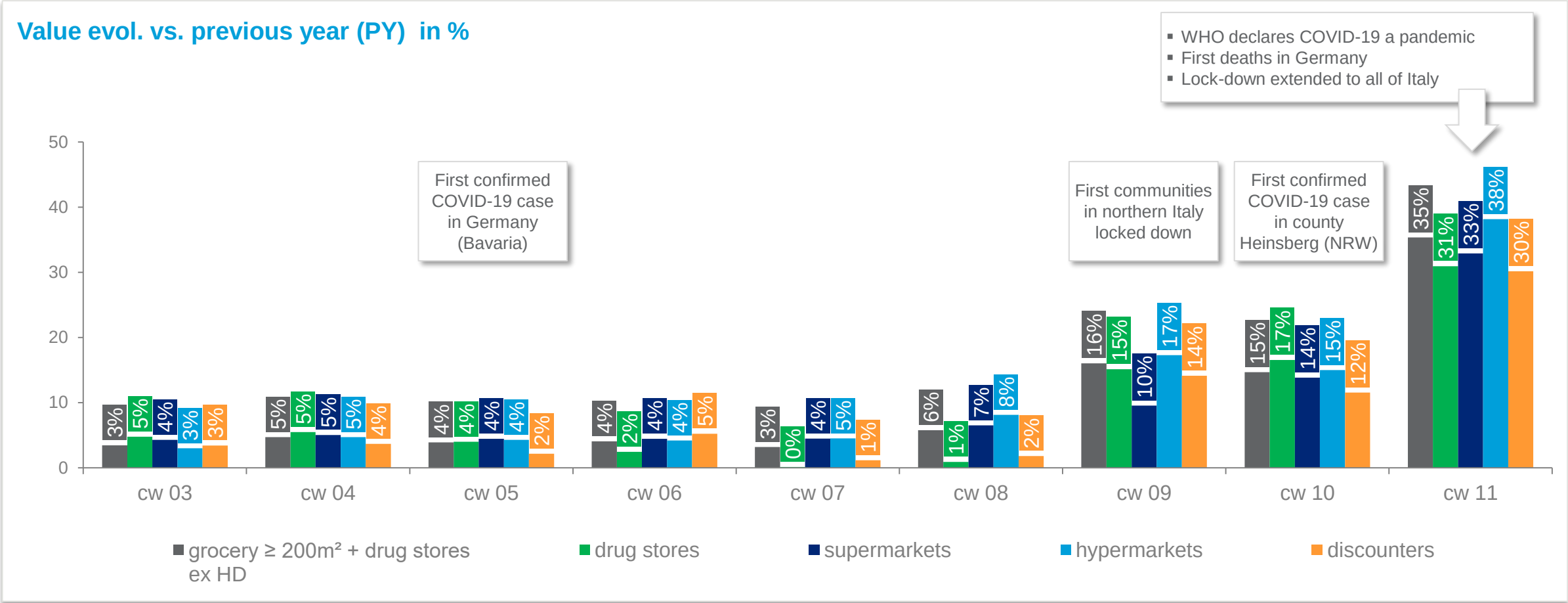
FMCG total – calendar weeks 2020



Source: IRI [FMCG]; [Grocery ≥ 200m²+ drug stores ex HD]; [cw 3-11]; Robert-Koch-Institut, Wikipedia COVID-19 in Deutschland, Wikipedia COVID-19-Pandemie

All retail channels show a significant sales uplift since cw9

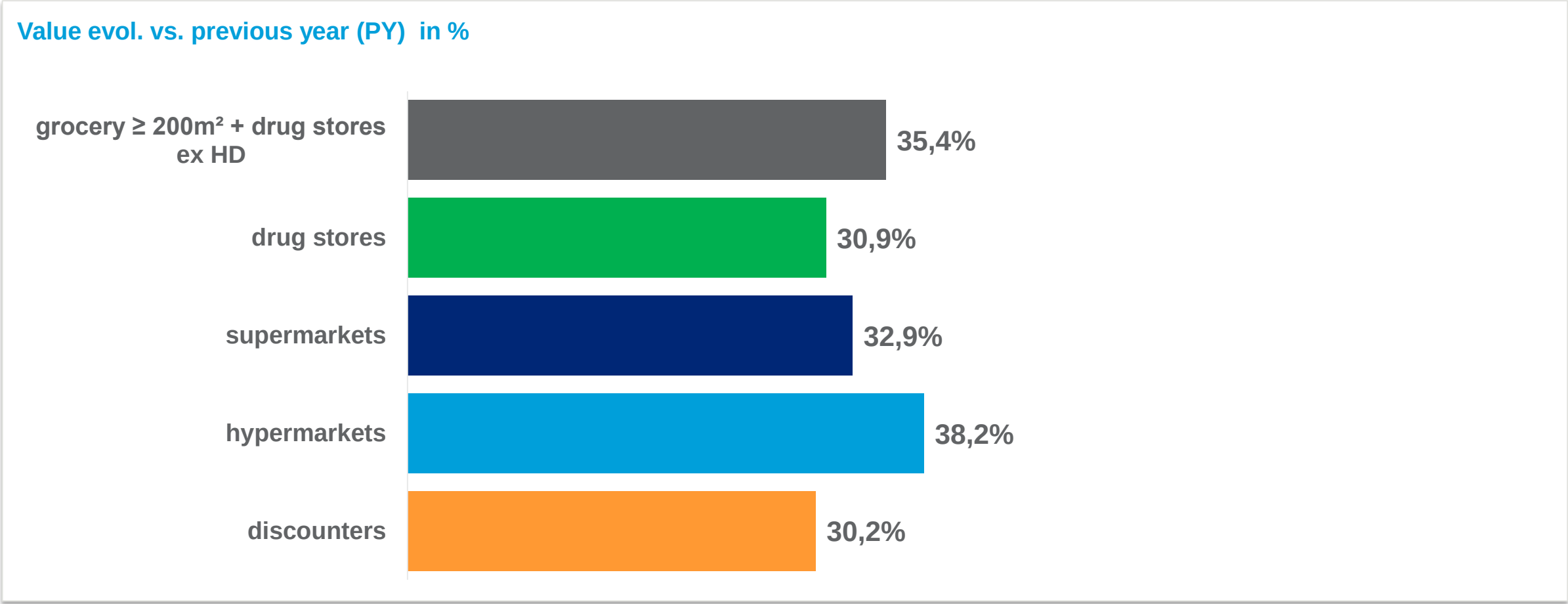
FMCG total retail channel view – calendar weeks 2020



Source: IRI [FMCG]; [Grocery ≥ 200m²+ drug stores ex HD]; [cw 3-11]

Growth rate of FMCG sales goes up to +35,4% in cw 11/2020; +20,7pp compared to cw 10/2020

FMCG total retail channels view – calendar week 11/2020

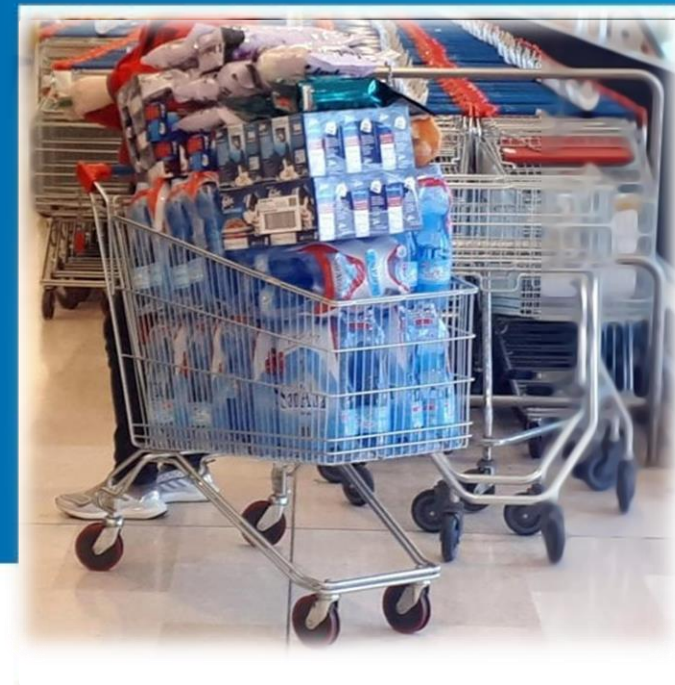


Source: IRI [FMCG]; [Grocery ≥ 200m²+ drug stores ex HD]; [cw 11 vs. PY]

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Germany by IRI areas

Weekly value sales

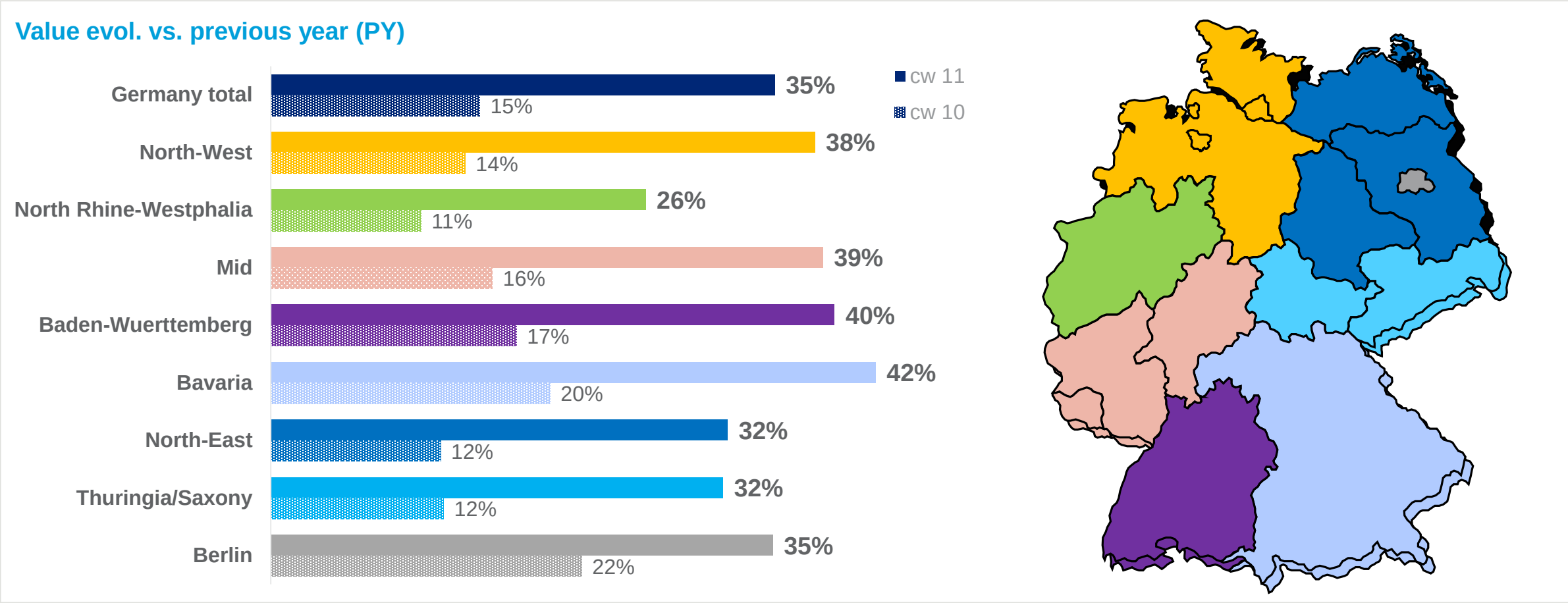


IRi

Growth delivered.

Sales growth comes from all parts of the country, especially Bavaria, Baden-Wuerttemberg and the Mid show high growth rates compared to previous week

FMCG total by IRI areas – calendar weeks 2020

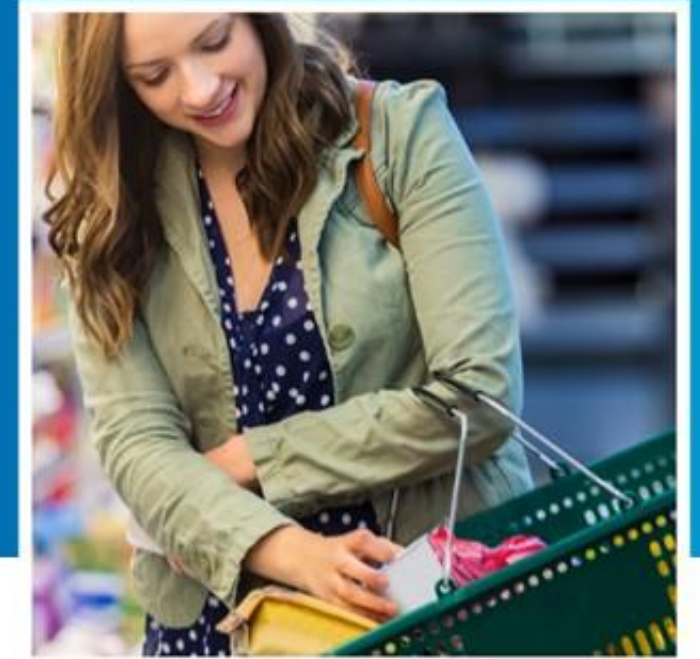


Source: IRI [FMCG]; [Grocery ≥ 200m²+ drug stores ex HD]; [cw 10 & 11]

IRI Corona Tracker

Development of selected product groups

Weekly value sales



IRi

Growth delivered.

Toilet paper and pasta do not show the highest growth rates in calendar week 11/2020

Value evol. vs. previous year – Selected FMCG categories – calendar week 11/2020



DAMP CLEANSING TISSUES
+ 474,6%



HYGIENE-/SANITARY CLEANER
+ 251,3%



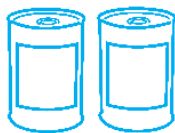
SOAP
+ 239,7%



GRAIN FLOUR
+ 185,2%



HOUSEHOLD GLOVES
+ 210,2%



SEMIFINISHED CONVENIENCE
FOOD ALL TYPES (CAN/GLAS)
+193,6%



PASTA
+218,2%



DRY TOILET PAPER
+ 120,8%

Quelle: IRI [FMCG]; [LEH ≥ 200qm (ex. HD) + DM]; [KW 11]

Demand for hygiene products and long-life foods remains strong, growth rates soaring especially for pasta and ready meals

Value evol. vs. previous year – Top 20 winners FMCG categories

TOP 20 winners	cw 03	cw 04	cw 05	cw 06	cw 07	cw08	cw 09	cw 10	cw 11
DAMP CLEANSING TISSUES	44,8%	59,0%	94,7%	91,2%	85,8%	84,5%	403,1%	393,6%	474,6%
HYGIENE - / SANITARY CLEANER	3,3%	15,4%	64,1%	40,6%	33,5%	24,6%	316,7%	295,9%	251,3%
SOAP	8,0%	11,6%	35,3%	22,5%	20,9%	19,1%	171,0%	163,5%	239,7%
NOODLES	13,6%	31,2%	-12,0%	8,4%	12,4%	13,1%	98,8%	93,9%	218,2%
HOUSEHOLD GLOVES	17,0%	16,1%	18,9%	22,1%	17,6%	14,7%	138,8%	105,1%	210,2%
SEMIFINISHED CONVENIENCE FOOD ALL TYPES CANNED / GLAS	10,2%	28,9%	14,9%	9,5%	3,6%	15,3%	129,8%	63,0%	193,6%
GRAIN FLOUR	3,4%	14,5%	7,8%	7,3%	7,7%	10,3%	146,2%	113,9%	185,2%
WET CONVENIENCE FOODS	-8,9%	21,9%	7,9%	12,2%	7,1%	6,5%	121,9%	56,7%	179,8%
DRIED POTATO PRODUCTS	0,7%	0,2%	-0,3%	4,1%	10,1%	-0,4%	119,8%	71,9%	162,6%
RICE	12,3%	11,3%	21,8%	2,3%	5,7%	1,4%	159,6%	69,8%	161,6%
LIQUID READY TO EAT SAUCES	12,7%	26,0%	-4,6%	12,7%	5,0%	8,1%	78,7%	52,9%	150,8%
MELISSENGEIST	2,5%	3,3%	1,3%	-3,3%	-3,8%	4,6%	22,0%	51,3%	145,4%
LIQUID SOUPS / STEWS GRAM	2,5%	-6,1%	5,5%	9,8%	0,9%	28,7%	119,8%	65,6%	135,2%
SEMIFINISHED-/CONVENIENCE FOOD. POTATO WET	30,1%	28,3%	24,9%	9,2%	32,5%	30,8%	94,6%	37,7%	134,5%
GRIT	-0,4%	2,1%	1,5%	4,1%	4,0%	1,6%	96,2%	55,6%	128,7%
DRIED POTATO DUMPLINGS	2,7%	-10,0%	-9,9%	-6,7%	10,4%	1,5%	119,4%	73,2%	127,9%
DRIED PULSES	2,3%	0,9%	5,6%	15,5%	11,2%	10,0%	140,9%	56,7%	127,9%
VEGETABLES CAN / GLASS / BRICK	12,6%	3,7%	10,6%	7,9%	9,3%	3,1%	101,3%	58,0%	124,4%
DRY TOILETPAPER	2,3%	3,0%	5,5%	-0,4%	-1,0%	1,5%	52,0%	77,0%	120,8%
DAMP TOILETPAPER	7,3%	8,3%	8,5%	12,2%	7,8%	8,3%	41,1%	43,8%	120,3%

Source: IRI [FMCG]; [Grocery ≥ 200m²+ drug stores ex HD]; [cw 3-11]

Staple foods, canned food, dry products, cleaning and household paper products continue the list of top-selling products

Value evol. vs. previous year – Top 21-44 winners FMCG categories

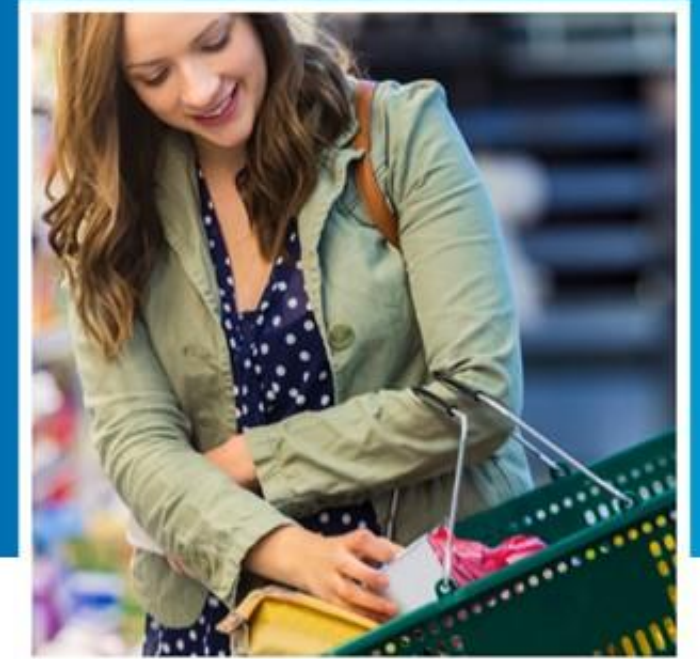
TOP 21-40 winners	cw 03	cw 04	cw 05	cw 06	cw 07	cw08	cw 09	cw 10	cw 11
VEGETABLE CONCENTRATES /-PASTES	10,9%	7,2%	6,5%	6,8%	12,5%	-2,9%	99,0%	58,7%	116,8%
KITCHEN PAPER TOWELS	9,6%	8,2%	0,6%	6,0%	3,1%	4,2%	40,7%	53,0%	109,9%
SUGAR	7,6%	6,4%	9,1%	8,7%	14,8%	15,2%	82,2%	70,1%	106,6%
SYNDET / WASHING LOTION	6,2%	8,0%	8,6%	7,1%	5,6%	3,5%	54,3%	54,6%	106,0%
COOLED YEAST	12,3%	12,8%	13,0%	14,8%	20,5%	29,5%	60,3%	65,4%	104,0%
CANNED FISH	2,2%	13,7%	-15,8%	-4,4%	19,9%	31,0%	40,3%	12,5%	102,9%
TUNA	1,6%	-5,5%	6,2%	6,4%	3,0%	3,9%	85,2%	31,1%	93,9%
VINEGAR CLEANER	9,3%	15,6%	17,4%	11,7%	6,4%	23,4%	30,5%	37,8%	91,4%
CANNED HERB / CABBAGE	-10,9%	0,4%	1,0%	7,6%	6,1%	4,5%	83,9%	50,0%	90,8%
SALT	1,8%	2,1%	-0,6%	3,0%	5,3%	6,8%	67,9%	47,2%	90,8%
DRY VITAMIN PRODUCTS	6,9%	8,1%	12,9%	9,5%	6,0%	8,0%	48,9%	40,6%	90,6%
DRY SOUPS / STEWS	-2,3%	-5,9%	-9,3%	-4,8%	7,8%	5,4%	64,0%	40,1%	90,4%
ROAST / COOKING AIDS	26,5%	26,6%	17,1%	17,1%	22,9%	18,2%	61,3%	13,3%	90,0%
TOFU	36,0%	39,2%	38,8%	39,2%	40,9%	39,9%	80,0%	65,3%	89,2%
DRY NOODLE DOUGH PRODUCTS CONVENIENCE FOODS	2,5%	24,3%	4,3%	-8,2%	20,4%	25,0%	75,9%	35,8%	89,0%
SAUSAGES IN ASPIC	9,6%	7,9%	2,2%	11,9%	17,2%	20,8%	57,1%	36,6%	89,0%
SODA STREAM SPARKLING SYSTEMS	-16,6%	44,2%	93,6%	-0,6%	8,9%	30,0%	43,0%	25,9%	87,4%
BATHROOM / BATHTUB CLEANER	9,0%	6,9%	10,5%	1,9%	5,7%	0,9%	39,6%	46,0%	86,8%
PAPER TISSUES	-0,1%	1,0%	6,0%	-1,6%	1,9%	-3,5%	37,6%	38,5%	86,1%
ZWIEBACK / RUSK / CRISPY BAKED BUNS	15,3%	11,4%	14,0%	3,2%	12,1%	11,3%	69,1%	32,1%	85,3%

Source: IRI [FMCG]; [Grocery ≥ 200m²+ drug stores ex HD]; [cw 3-11]

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FMCG total E-Commerce

Weekly value sales

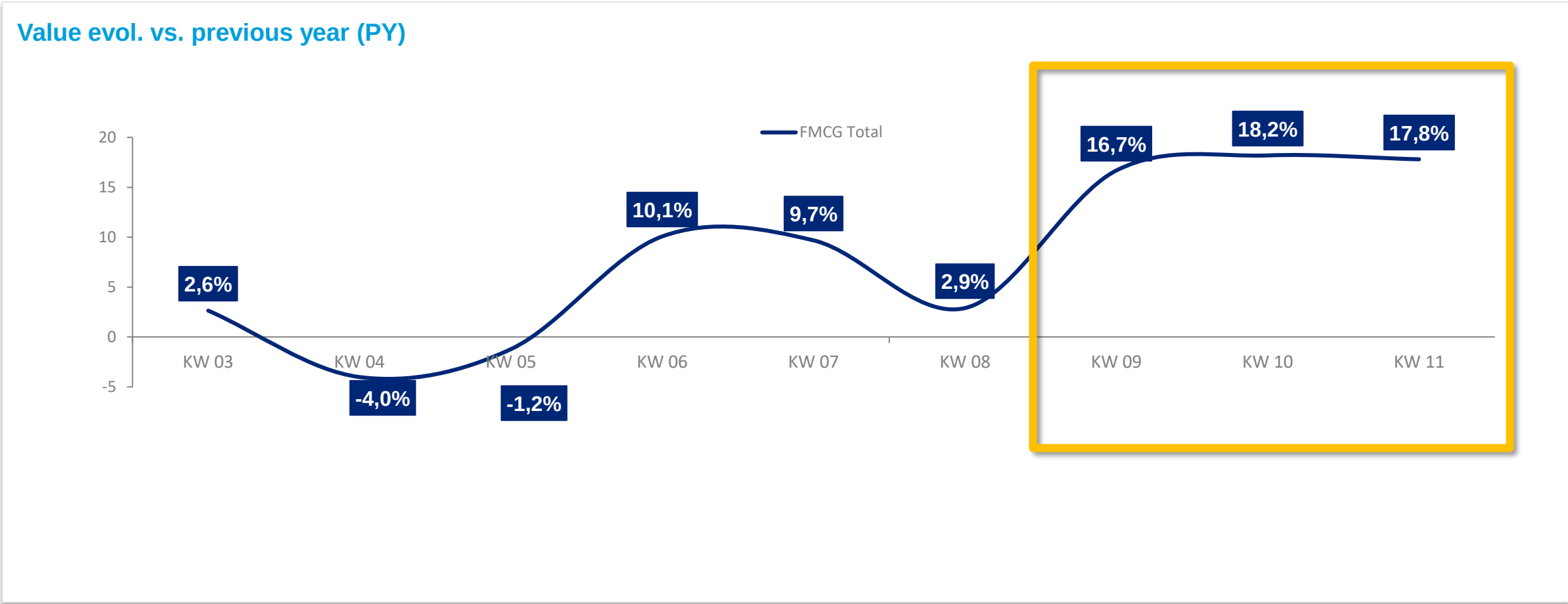


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Growth delivered.

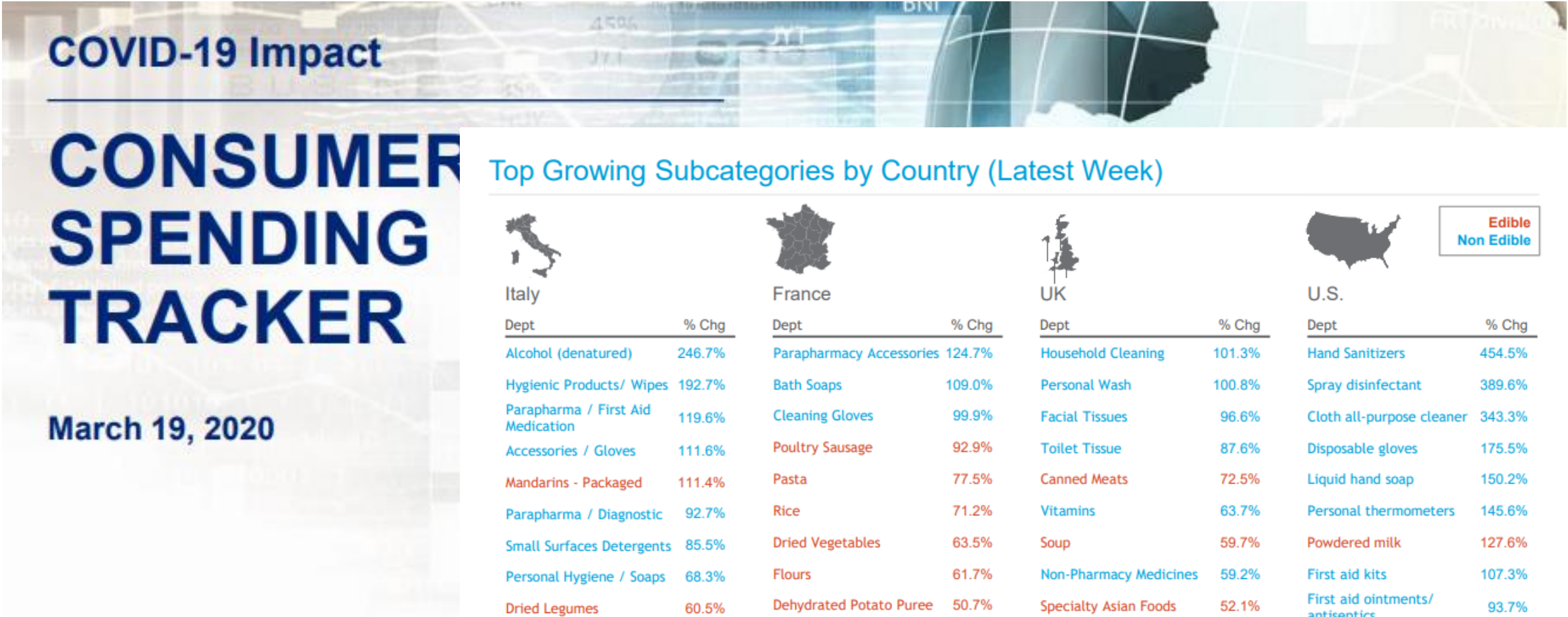
Online trade shows similar growth rates in calendar week 11 as in calendar weeks 9 and 10

Value sales growth FMCG total in selected, mostly non-food, online retailers



Source: IRI [FMCG]; [Grocery ≥ 200m²+ drug stores ex HD]; [cw 3-11]

An overall assessment of how the coronavirus is affecting the international FMCG industry can be found [here](#)



For further information please contact us!

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