



Cool Insights!

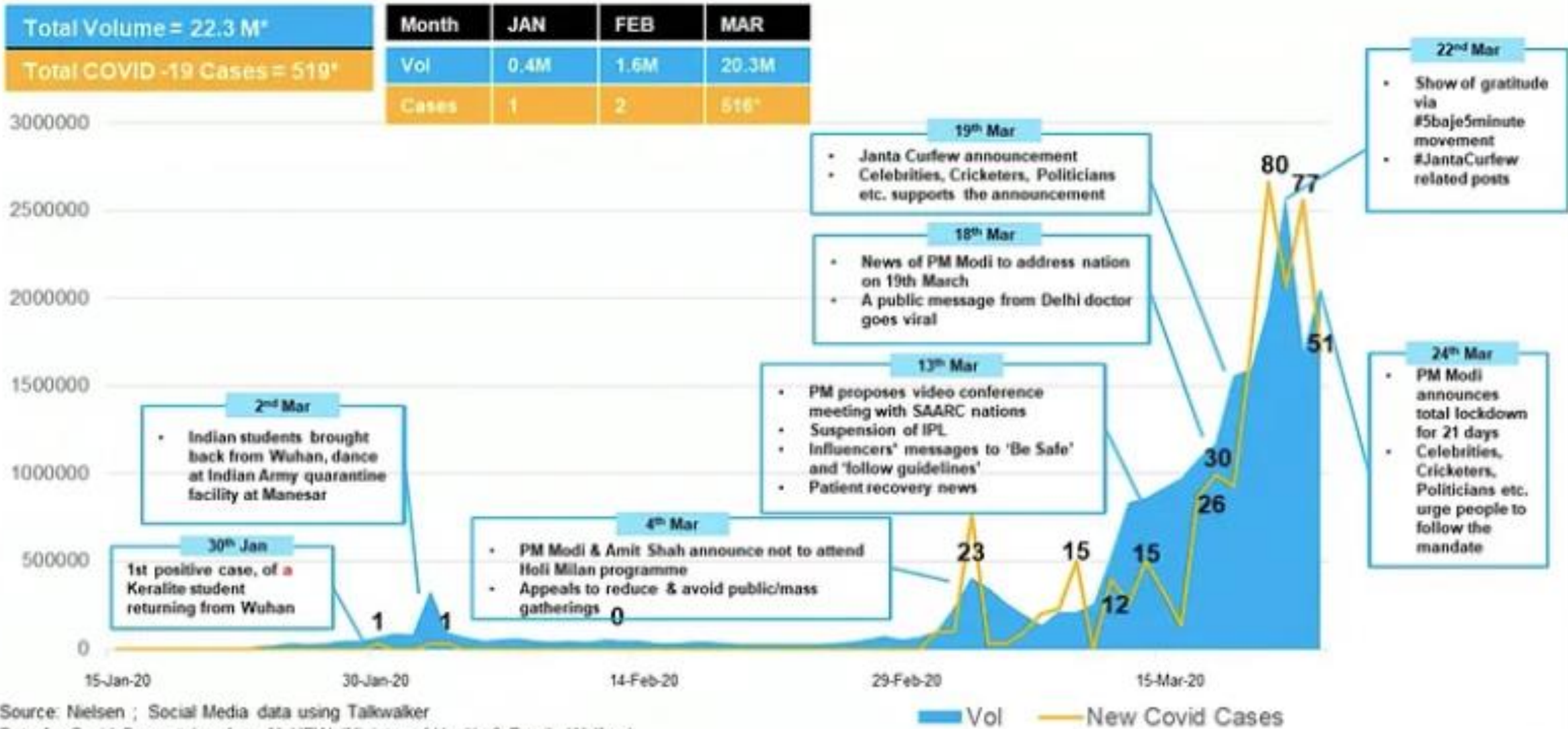
Impact of COVID-19 on Indian consumers

THE BEGINNING

The buzz around the Coronavirus began on social media in the first week of March. When fear of transmission rose, thanks to a flurry of activity on social media, consumption of certain groups of personal hygiene products shot up.

INDIA'S COVID-19 JOURNEY ON SOCIAL MEDIA

Social Media Buzz picked up in first week of March



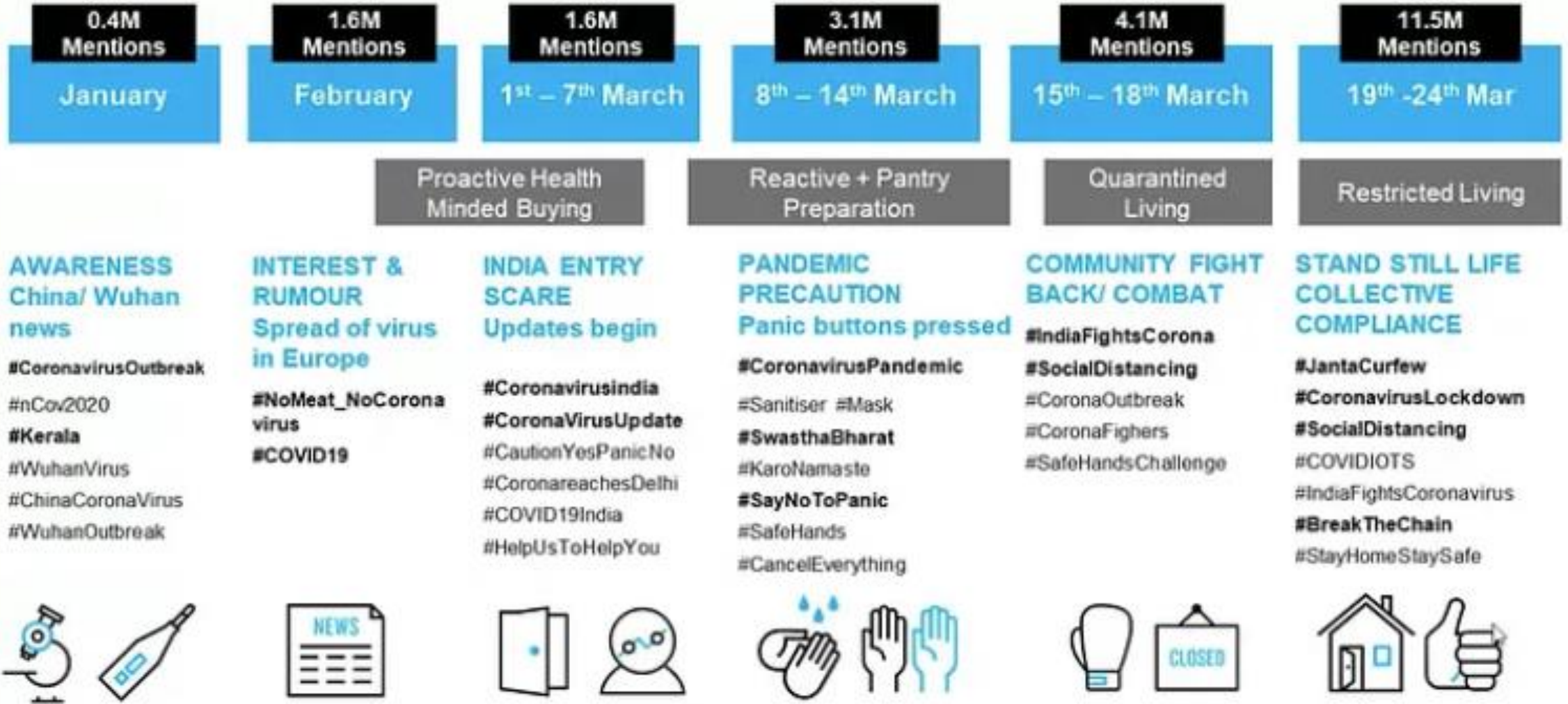
Source: Nielsen ; Social Media data using Talkwalker
 Data for Covid Cases taken from MoHFW (Ministry of Health & Family Welfare)
 *Timeline: 1st Jan 2020 – 24th Mar 2020

THE STRENGTH OF SOCIAL MEDIA

Social media discussions in the awareness stage (end of February towards the first of March) helped surge in demand for health and wellness products.

Report of the first confirmed Covid-19 case in Kerala brought up larger social media conversations on the topic.

NIELSEN CONSUMER BEHAVIOUR THRESHOLDS REFLECT INDIA'S SOCIAL BUZZ



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CATEGORIES SWELLED

Certain categories swelled due to strength of social conversations.

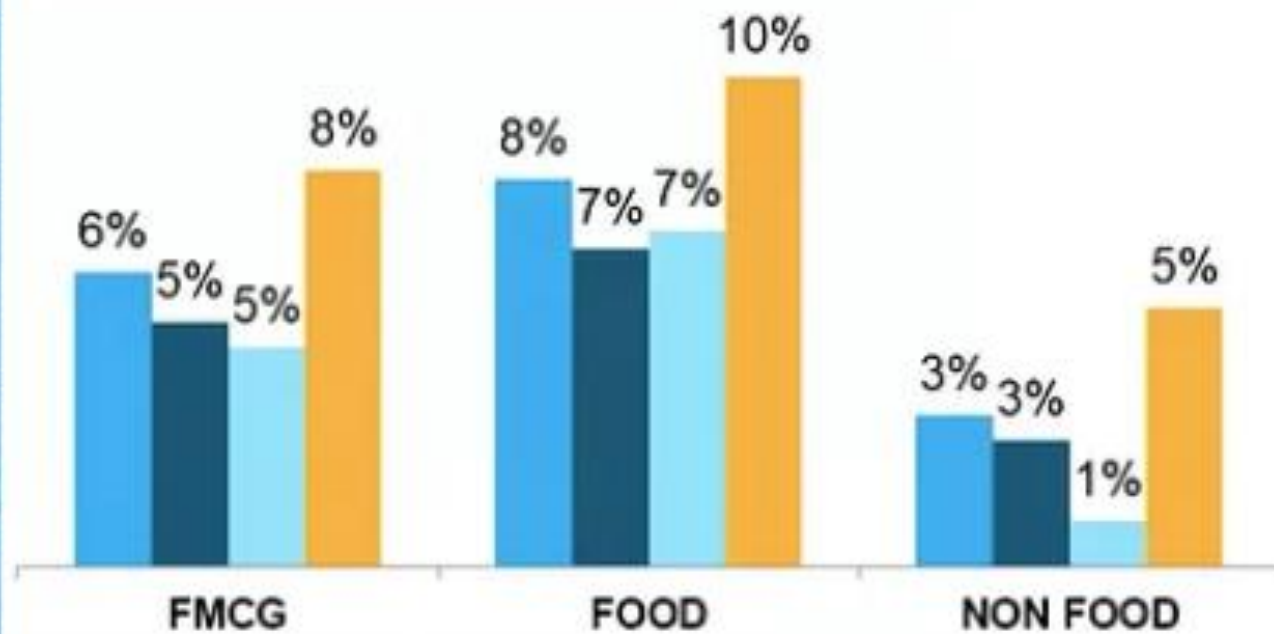
The difference is stark when it comes to comparing growth numbers from last year to growth numbers in the month of March alone, as a result of the virus.

Hand sanitizer sales in India grew a whopping **290%**, up from 27% in the first week of March.

COVID-19 SCARE DROVE SIGNIFICANT GROWTH FOR HYGIENE CATEGORIES IN FEB

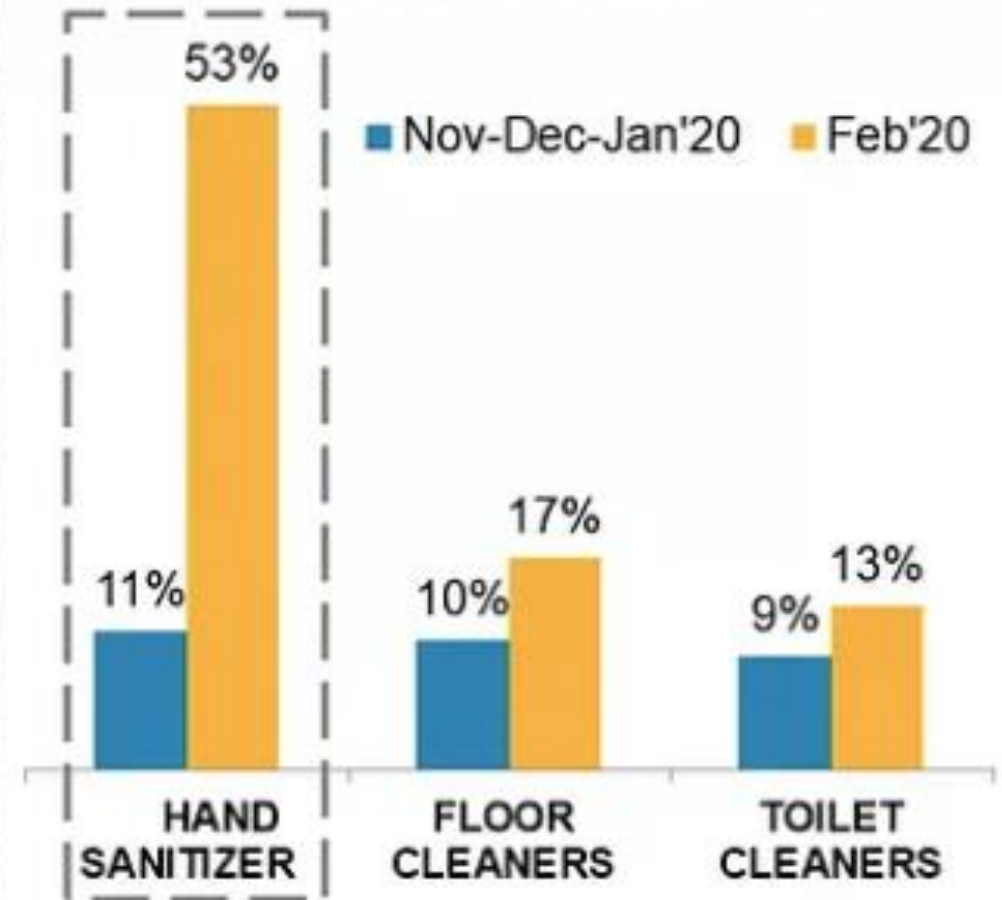
FMCG GROWTH vs YEAR AGO

■ Nov-19 ■ Dec-19 ■ Jan-20 ■ Feb-20



HYGIENE CATEGORIES

■ Nov-Dec-Jan'20 ■ Feb'20



Market: All India

Value Growth over same period of last year

Source: Nielsen RMS (Includes General trade and Modern Trade)

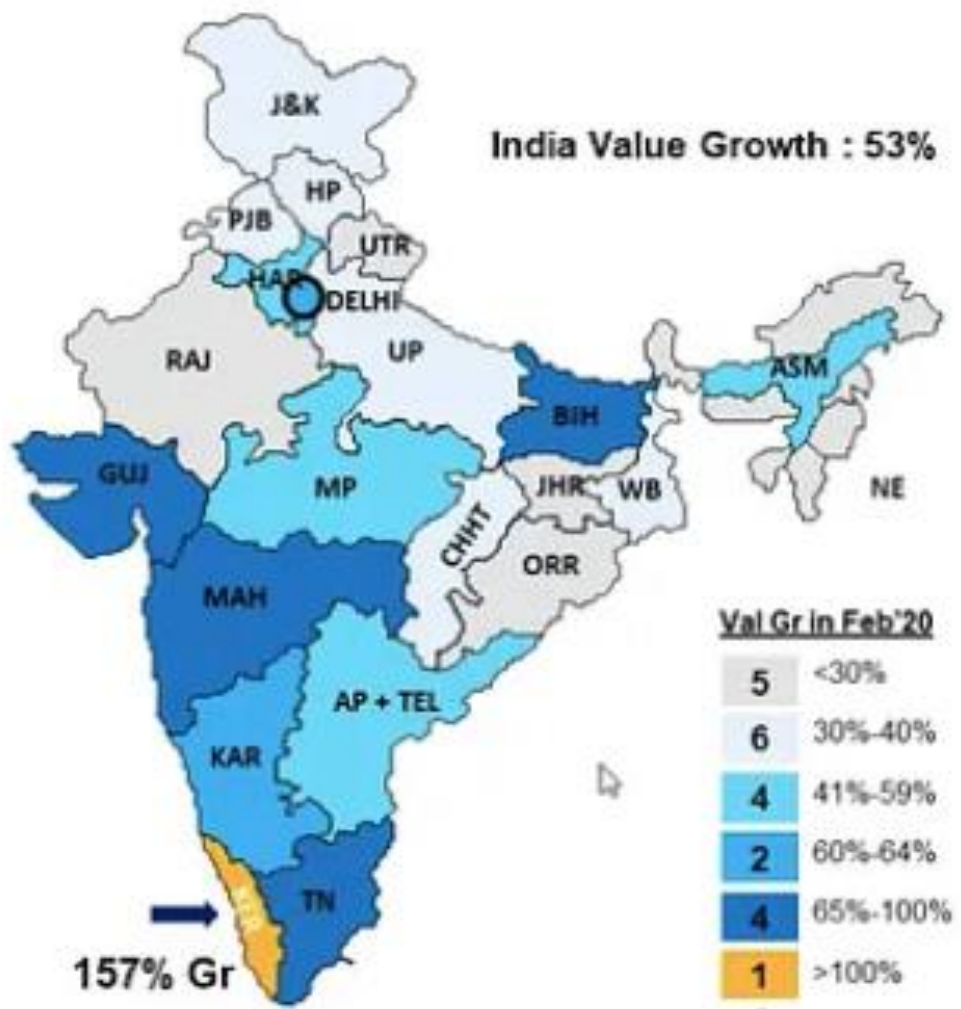
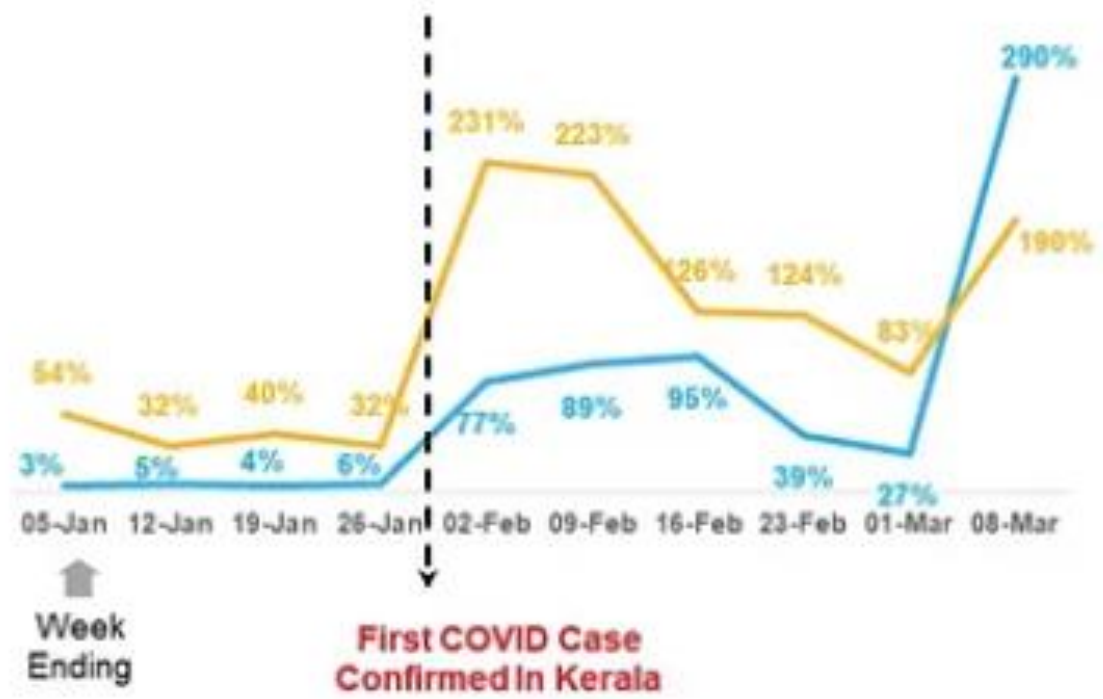
HAND SANITIZER SALES SURGED IN FEBRUARY

11 out of 21 states witnessed > 40% growth over year ago



MODERN TRADE - BANNERS

— India (MT-Banners) — Kerala (MT-Banners)



Source: Nielsen

Value Gr vs YA

Hand Sanitizers: Feb'20 Gr vs YA

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E-COMMERCE

In March, e-commerce as a platform was heavily utilized since some of the supplies became unavailable at retail stores.

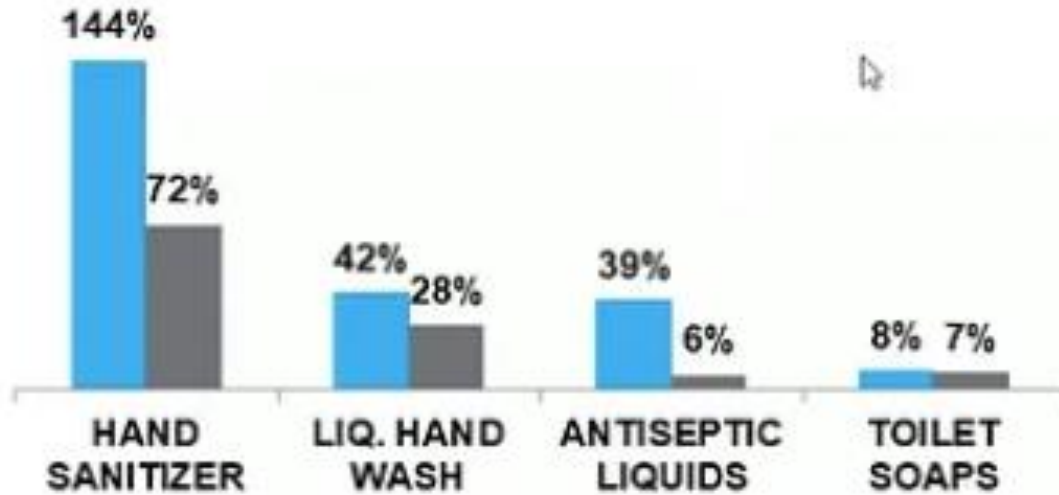
2.

PURCHASE TRENDS: HEALTH & HYGIENE PRODUCTS

Personal Hygiene products growth leapfrogged in March. E-Com orders sky-rocketed

TRADITIONAL TRADE GROWTH
Mid Feb to Mid March

■ 2020 vs. 2019 ■ 2019 vs. 2018



E-COMMERCE ORDER GROWTH%
Avg Weekly - Mar'20 v/s Feb'20



Source: Nielsen RMS unprojected Data from 18000 retail stores
India Value Sales

Source: Nielsen E-analytics
Avg No of Order - Feb (4 weeks) March (2 weeks)

SCENARIO NOW

When India announced the lockdown, consumer buying pattern, taking precautionary measures, surged demand for medical items like disposable gloves, masks, and over the counter medicines such as paracetamol tablets, antihistamine tablets like Allegra and cough syrup.

THE FIGHT

However, the Indian consumer is fighting against COVID-19 valiantly and we know we are #MPOWER -ed by an impeccable team of service providers, be it the neighborhood grocer or the online pharmacy.

We will sure survive!

▶ WE SHALL BE BACK WITH MORE
INSIGHT.
VERY SOON!



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