



# November 2018 Summary

## Main Trends In The Israeli FMCG Market

# Data Base

The data is based on **2,150 stores**

comprised of Statewide Chains, Private Market and Convenience Stores

which transmit their POS scan data on a daily basis to StoreNext

and which represent **80% of the total sales in the barcoded FMCG market.**

Based on this data StoreNext, uses an advanced statistic model to perform an extrapolation for 100% of the Barcoded FMCG Market in Israel,

excluding Pharmacies, Kiosks and the Arab sector.

# Long Story Short



- ❖ November marks an increase of 5.5% in value sales, compared to last year which leads the YTD overall growth to 4.0%



- ❖ The StoreNext Price index rises by 1.0 points YTD compared to last year, but drops by 0.8 points compared to October



- ❖ The market share of the ten leading suppliers marks a decrease compared to last November, but doesn't change in the YTD period compared to last year

# Change in Sales and Price Indices

FMCG – January – November 2018 compared to January – November 2017



**+1.0%**

Change in StoreNext price index



**+4.0%**

**+ 1.5 Billion NIS**

Change in Value Sales



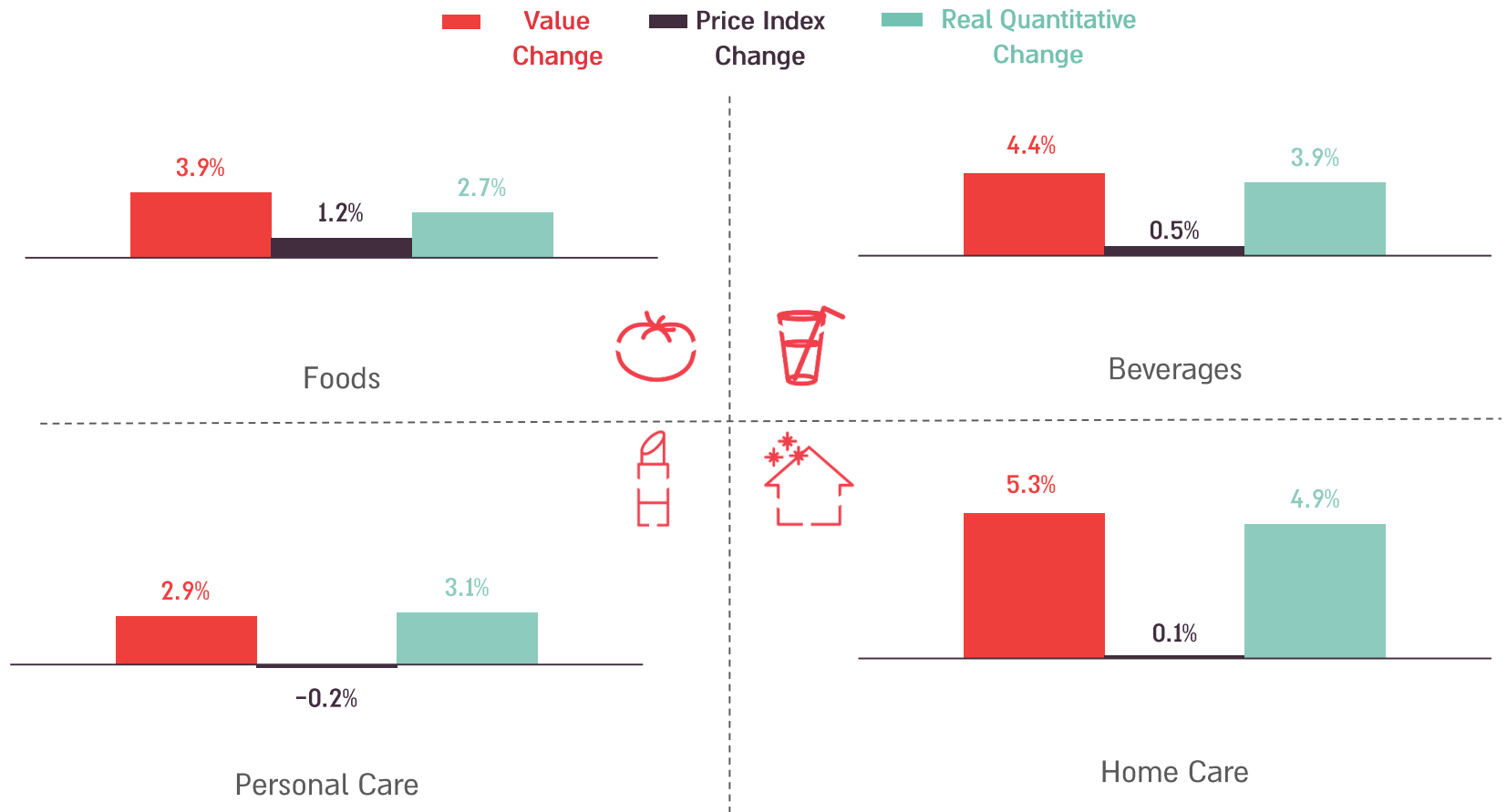
**+3.0%**

\*Real Quantitative Change

\* Real Quantitative Change – Value Sales growth deducted by the change in StoreNext Price Index (neutralized of mix effects) period-over-period

# FMCG Change Rate by Fields (January–November)

All of the fields mark an increase, both in value and in terms of real quantitative change, compared to last year. There is an increase in Price Index in all of the fields, besides Personal Care



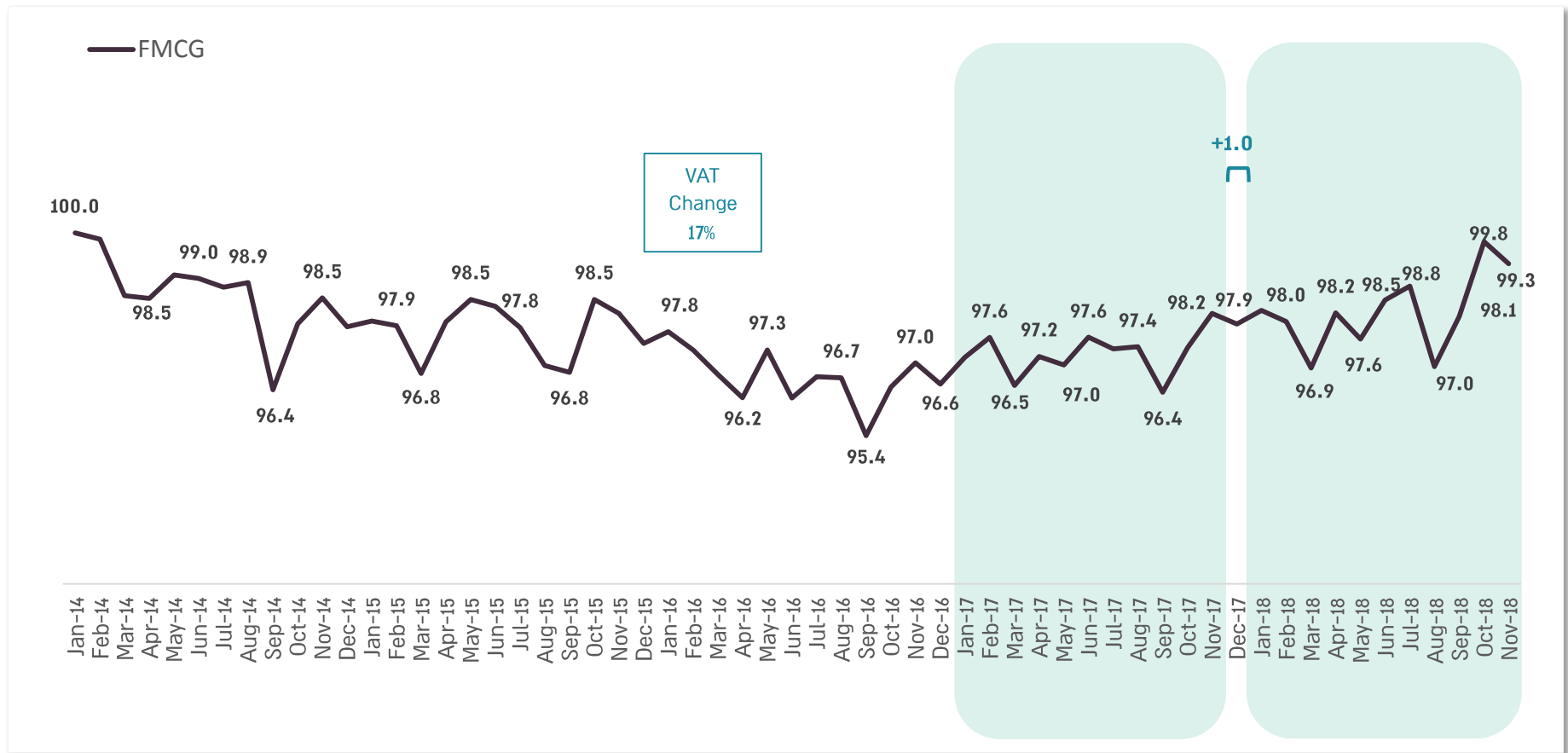
\* Real Quantitative Change – Value Sales growth deducted by the change in StoreNext Price Index (neutralized of mix effects) period-over-period

# The StoreNext Price Index

The StoreNext Price Index measures the change in products prices, while neutralizing changes in sales mix



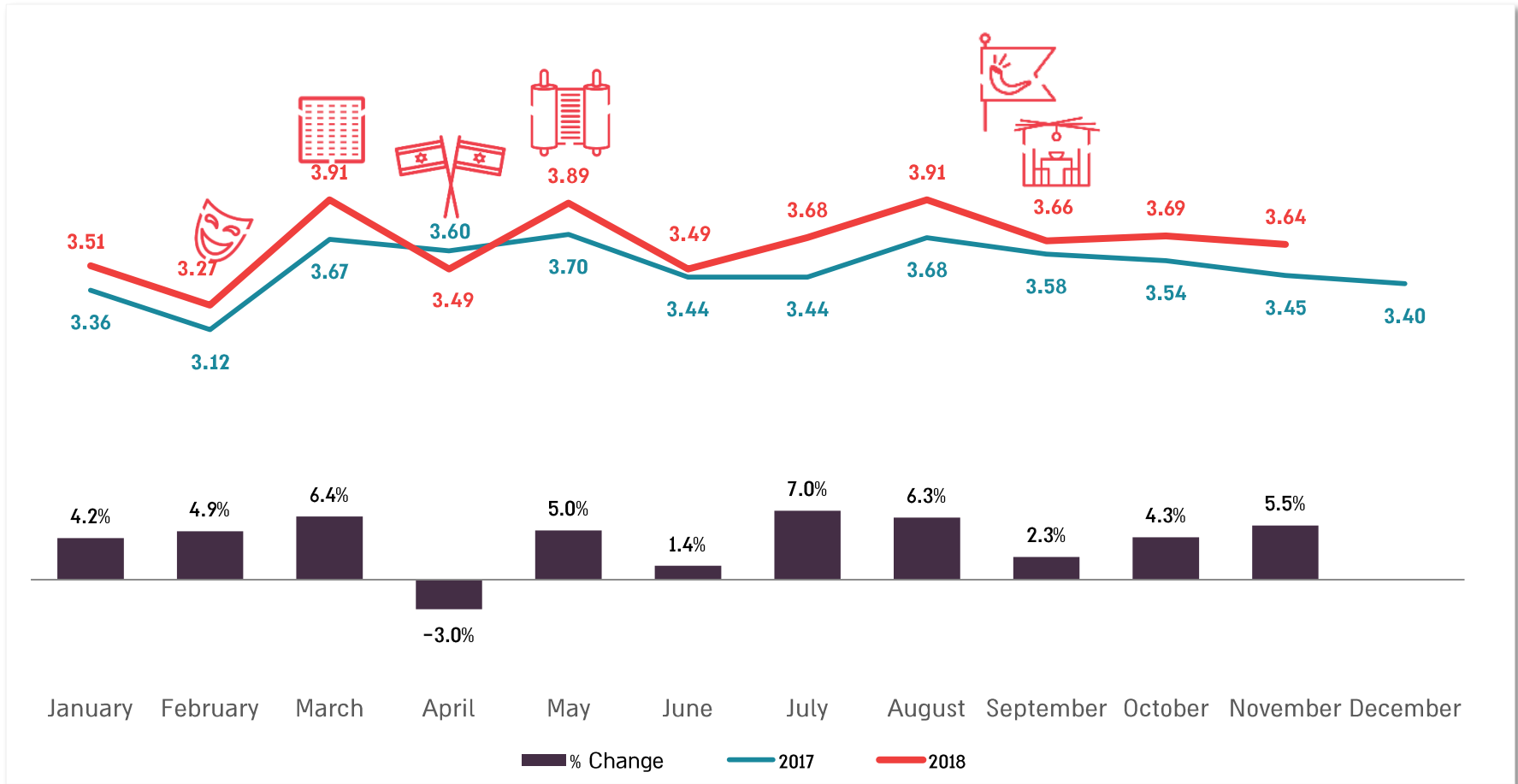
The StoreNext Price Index marks a decrease of 0.5 compared to October, but still shows a growth of 1.1 compared to last November



# Monthly Sales Trend

FMCG Value Sales, Billion NIS

There is an increase of 5.5% compared to last year's November, which adds to the YTD growth (4.0%). The growth may be influenced by the number of working days during the month, compared to last year's November



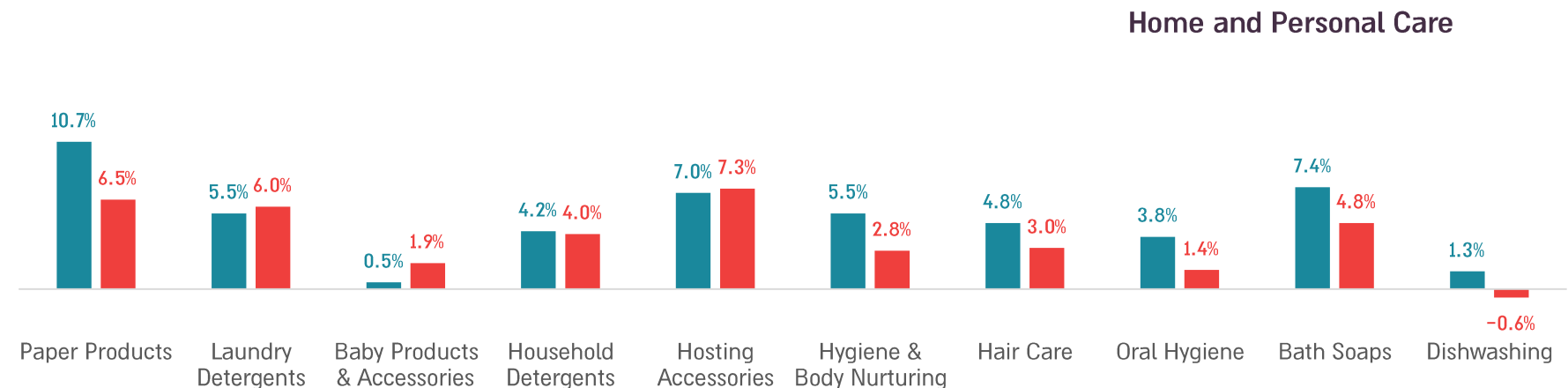
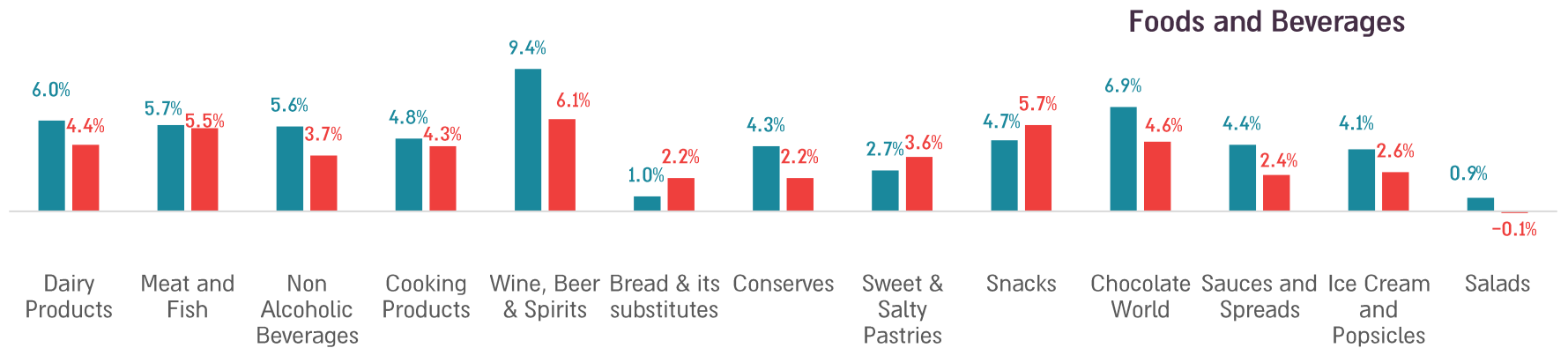
# Value Sales Change in Key Classes

Change in value sales - 2018 compared to 2017

Most of the key classes mark an increase in sales in November and YTD period, compared to the same period last year.

Paper Products, The Wine, Beer & Spirits and Chocolate World classes mark a more significant growth in current November versus last November compared to the YTD growth. The growth in those classes comes mostly from High Quality Toilet Paper (+20.6%), Packed Beer (+26.1%) and Milk Chocolate Tables (+18.9%) categories

■ Change in Value Sales November 2017-2018 ■ Change in Value Sales 2017-2018

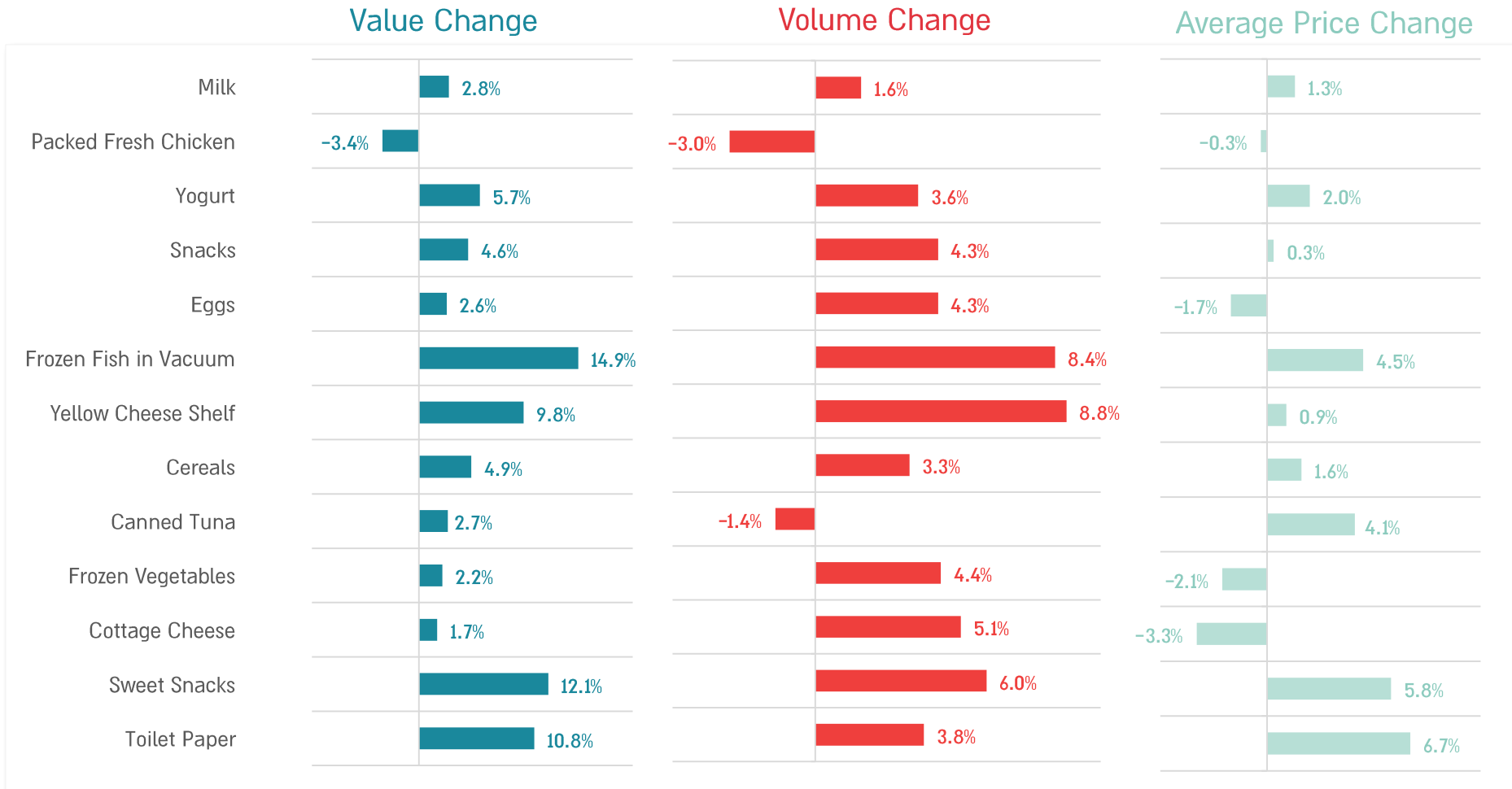




# Increasing/Decreasing Categories

Value Change November 2018 compared to November 2017

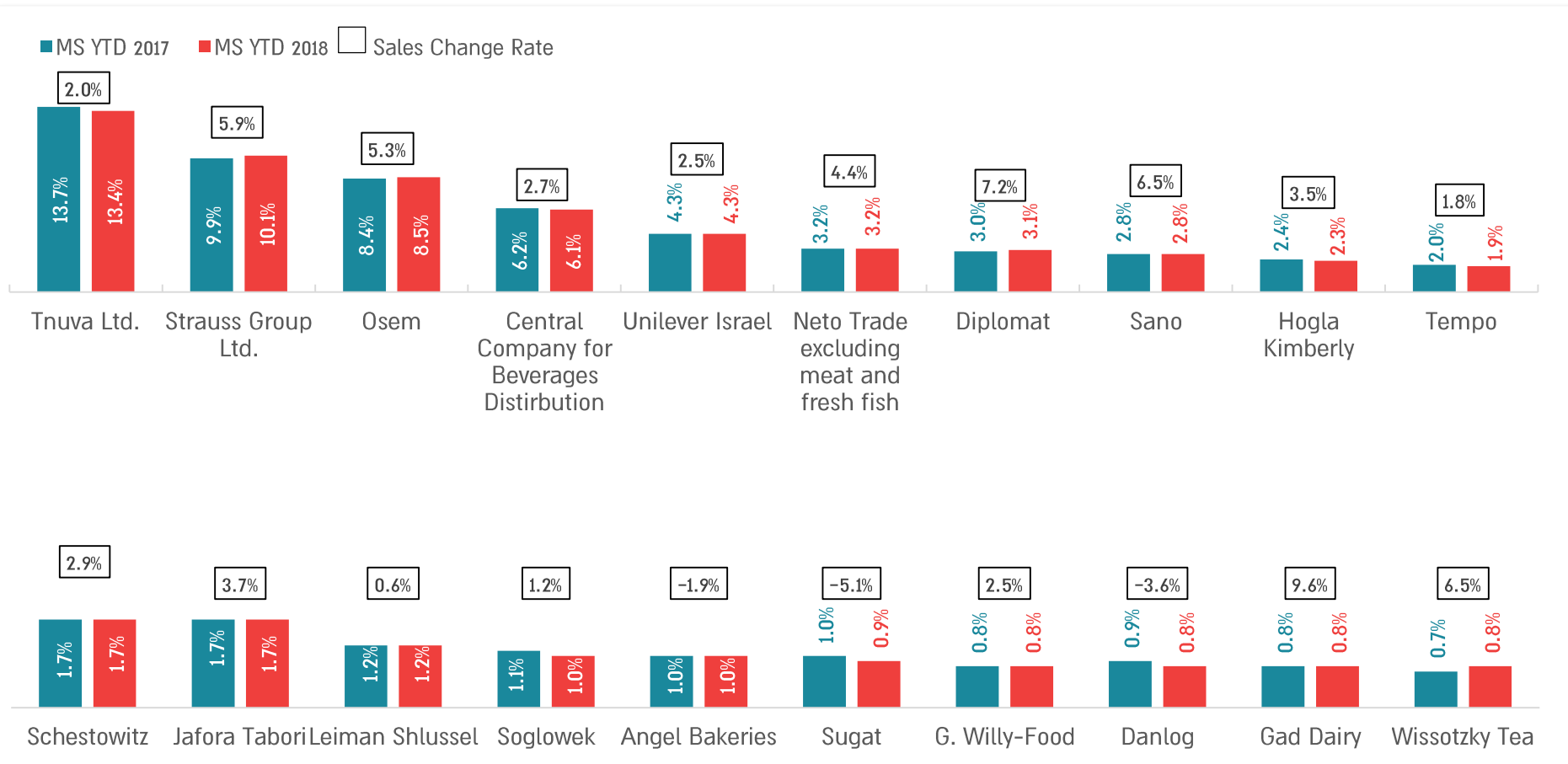
Among the most growing categories, Toilet Paper, Sweet Snacks and Frozen Fish in Vacuum mark a price increase affected by a mix change



# Market Share and Suppliers' Growth

Market Share Value of total FMCG

The market share of the ten leading suppliers is 55.2% in November which is a decrease of 0.4 compared to last year. In the YTD period the market share remains 55.8%, the same as last year's



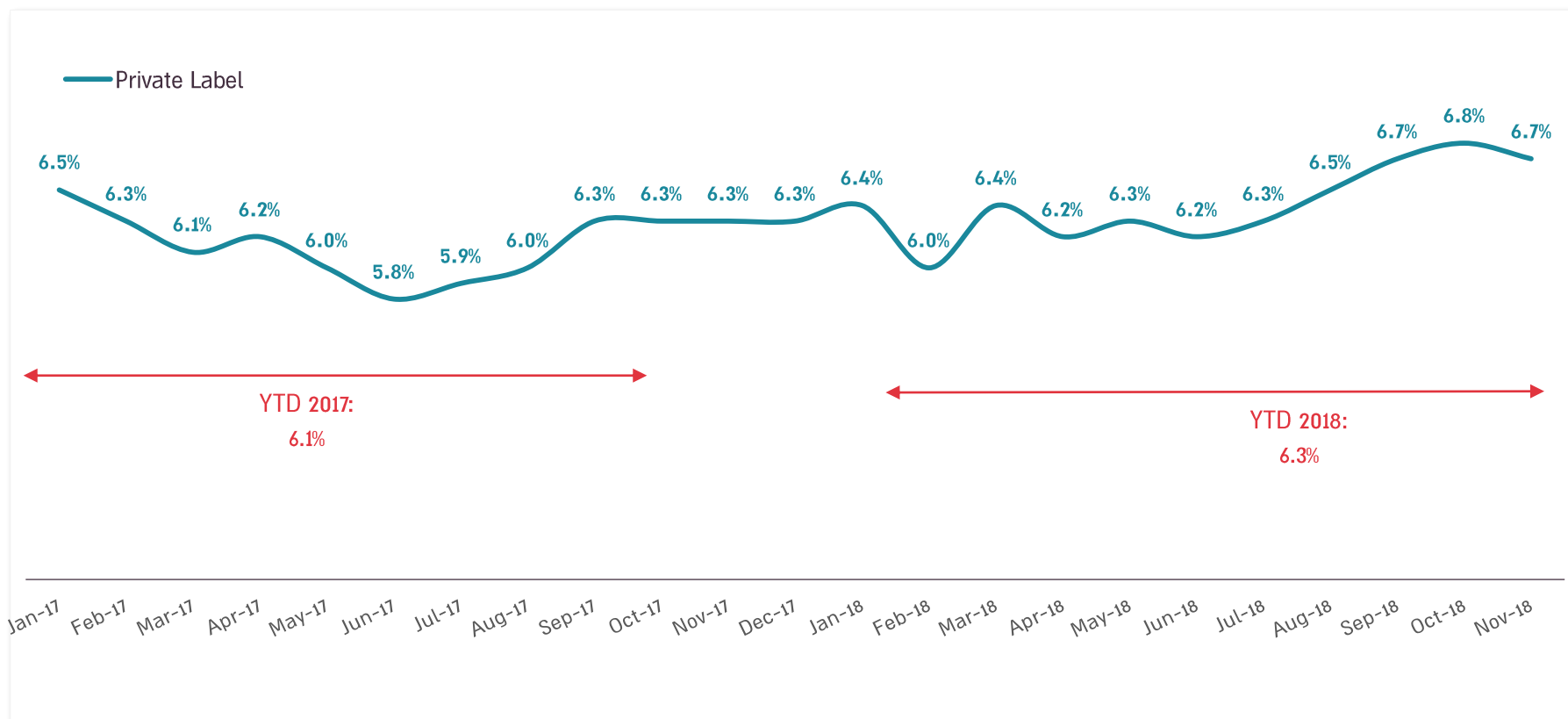
\*Excluding bakery, butchery, cigarettes and fruits and vegetables.

# Private Label Share of FMCG Market

Monthly Market Share Value



November 2018 marks a moderate decrease in the market share of the Private Label, compared to October. However it's still higher than it's market share in last November and the base period

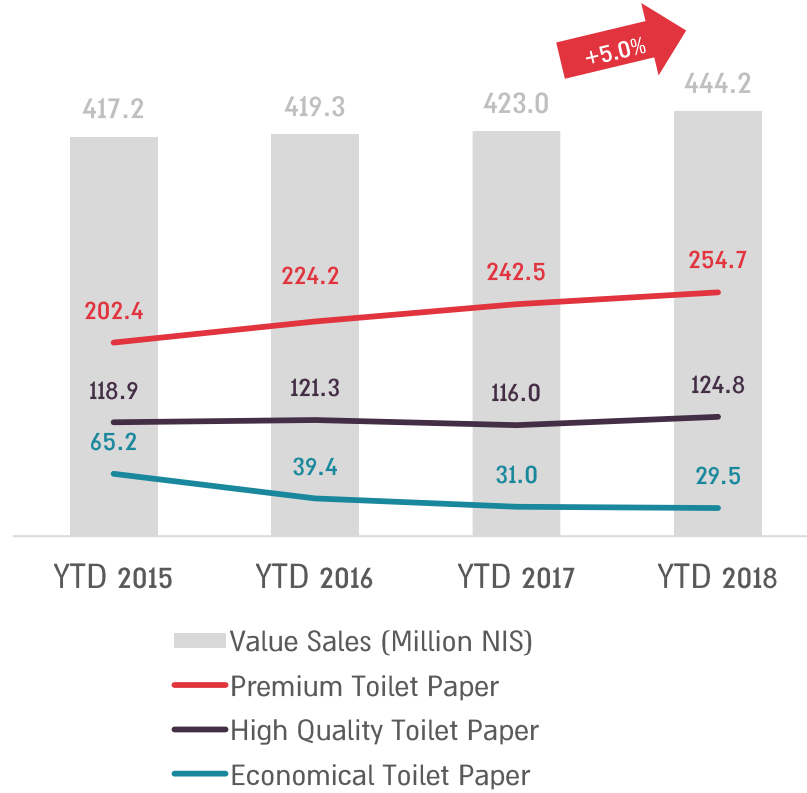


# Toilet Paper

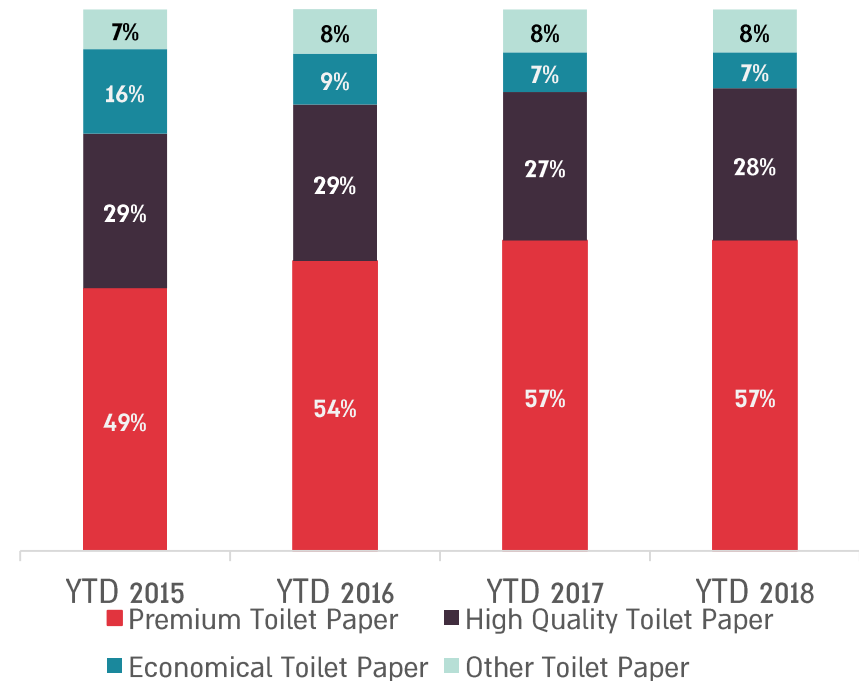
The Toilet Paper category is leading the growth in the class of Paper Products, which is one of the most growing classes in the Personal Care field in the YTD period.

Economical Toilet Paper category marks a decrease in value sales during the last four years, while the Premium Toilet Paper grows

## Value Sales (Million NIS)



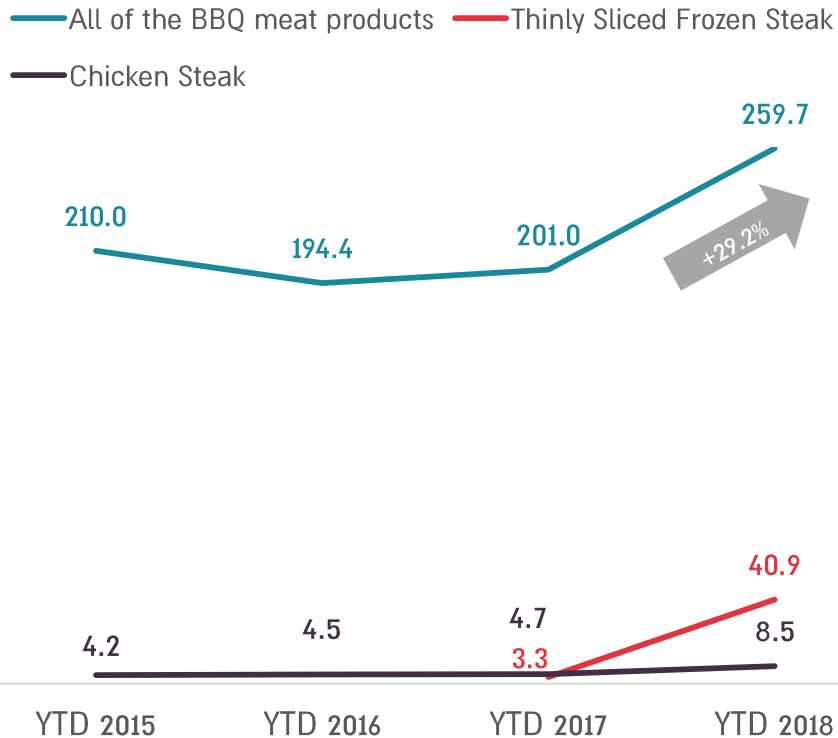
## Segment Mix



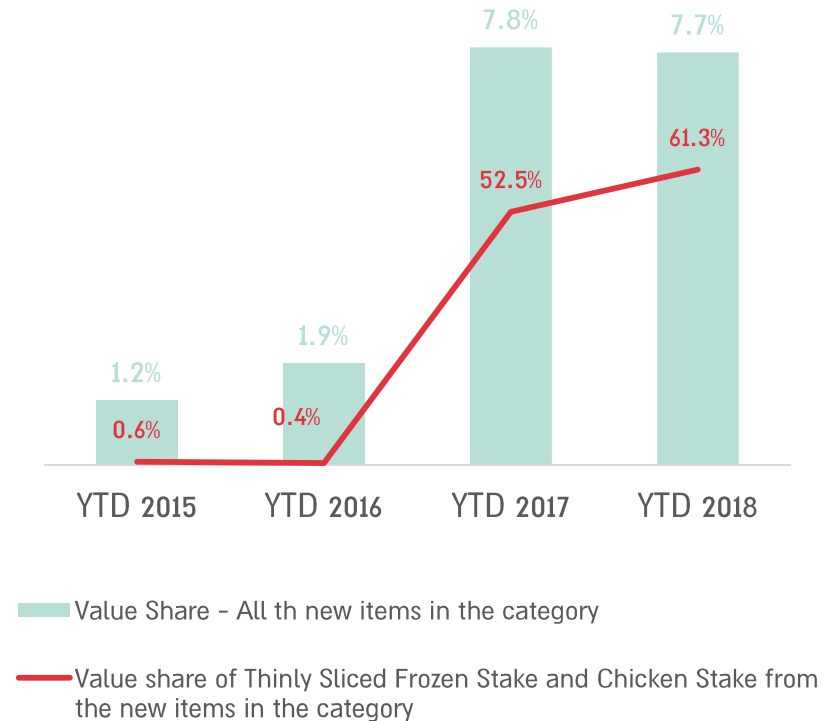
# BBQ Meat Products

The BBQ Meat Products category marks an increase of 29.2% in the YTD period, compared to last year. The growth is supported by numerous new product launches in the segments of Thinly Sliced Frozen Steak and Chicken Steak

## Value Sales (Million NIS)



## Value Share New Items





Thanks!

StoreNext

Looking Forward