COVID-19 WEEKLY UPDATE
Impact on the FMCG market
Week 14 – 29/03-04/04

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FMCG Market Trend vs Average MAT

- Week 14 marks a 26.6% growth compared to last 52 weeks average (based on 52 weeks until week 10 included)
- Beverages field is growing again after the decrease last week

26.6%	28.8%	12.4%	4.7%	53.5%
1,160	847	107	95	111
FMCG	Foods	Beverages	Personal Care	Home Care

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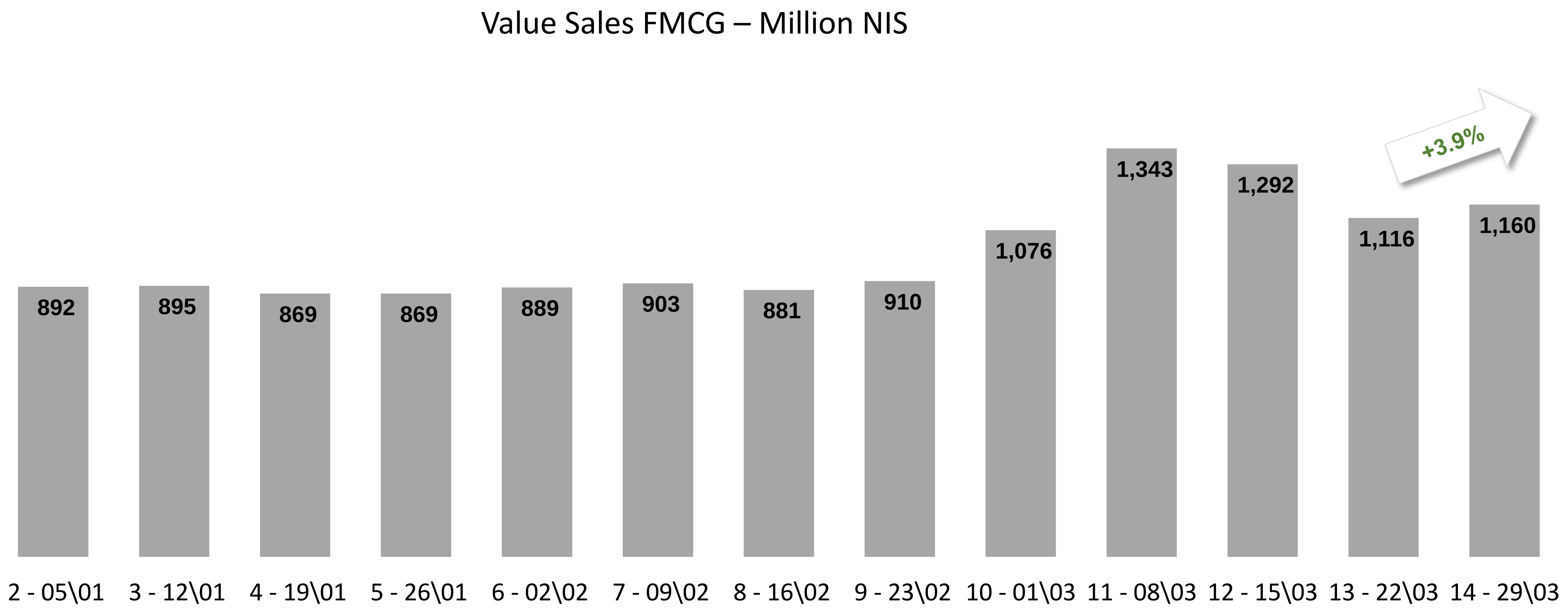
*All the data is compared to 52 weeks average - week 11 2019 to week 10 2020

FMCG – Weekly Trend

- Week 14 marks a 3.9% increase compared to week 13, as the trend of decreases after week 11 ends



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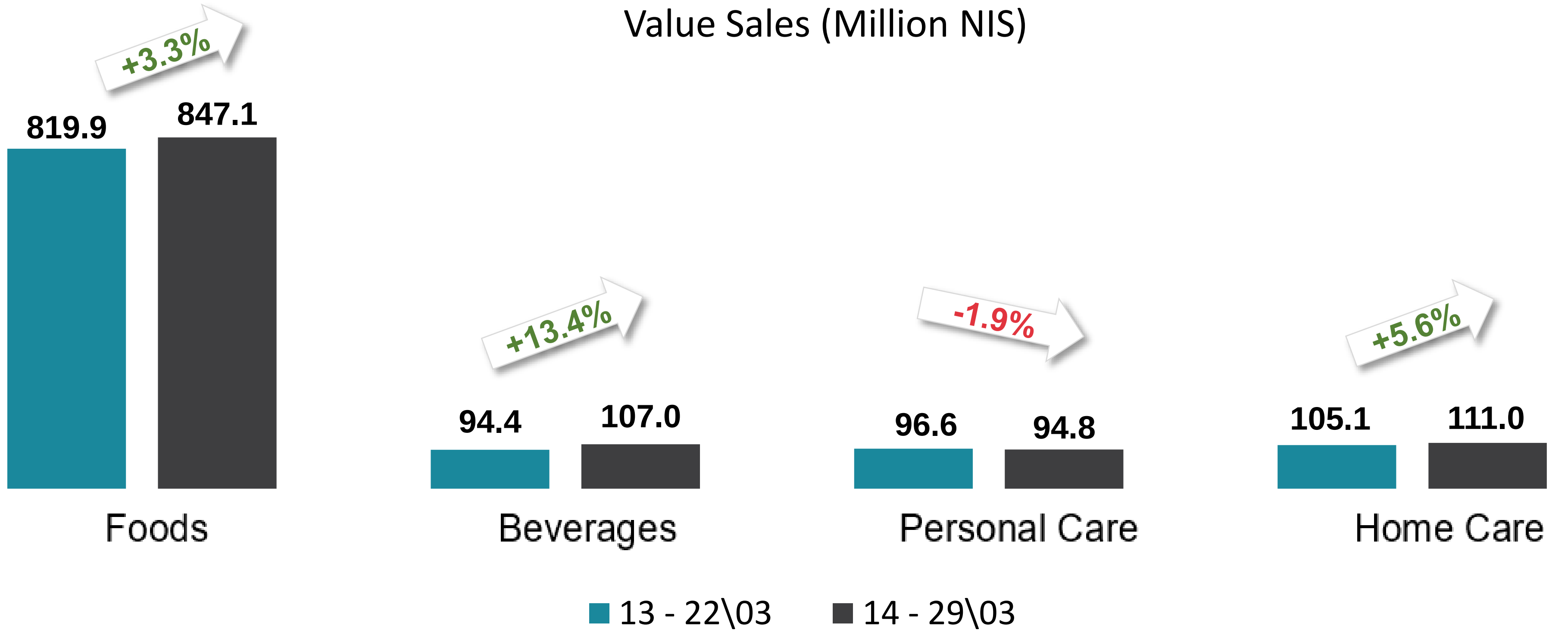
FMCG trend vs last week

- All the fields, besides Personal Care are growing compared to last week, as Beverages field recovers from previous week's decline



Highest Growing Fields

➢ The most growing fields of last week continue to grow, but some of the increases are more moderate (Bread & Bread Substitutes, Sauces & Spreads and Conserves)

Dairy Products & Substitutes	Bread & Bread Substitutes	Frozen Meat & Chicken	Sauces & Spreads	Baking & Cooking Aids
170.9	54.6	38.8	45.3	35.7
25.3	22.7	18.6	18.6	18.2
17.3%	71.1%	92.5%	69.5%	104.0%
2.2%	2.6%	10.2%	9.9%	10.3%

Wines	Conserves	Oils	House Hold Detergents	Sweet & Salty Pastries
31.7	42.6	23.8	20.0	39.7
16.5	9.9	9.5	8.1	7.9
108.7%	30.2%	66.1%	67.7%	24.7%
29.5%	0.3%	5.8%	-1.1%	4.1%

Value Sales (Milion NIS) week 14
Addition in Million Nis vs average
Change % vs average
Change % vs week 13

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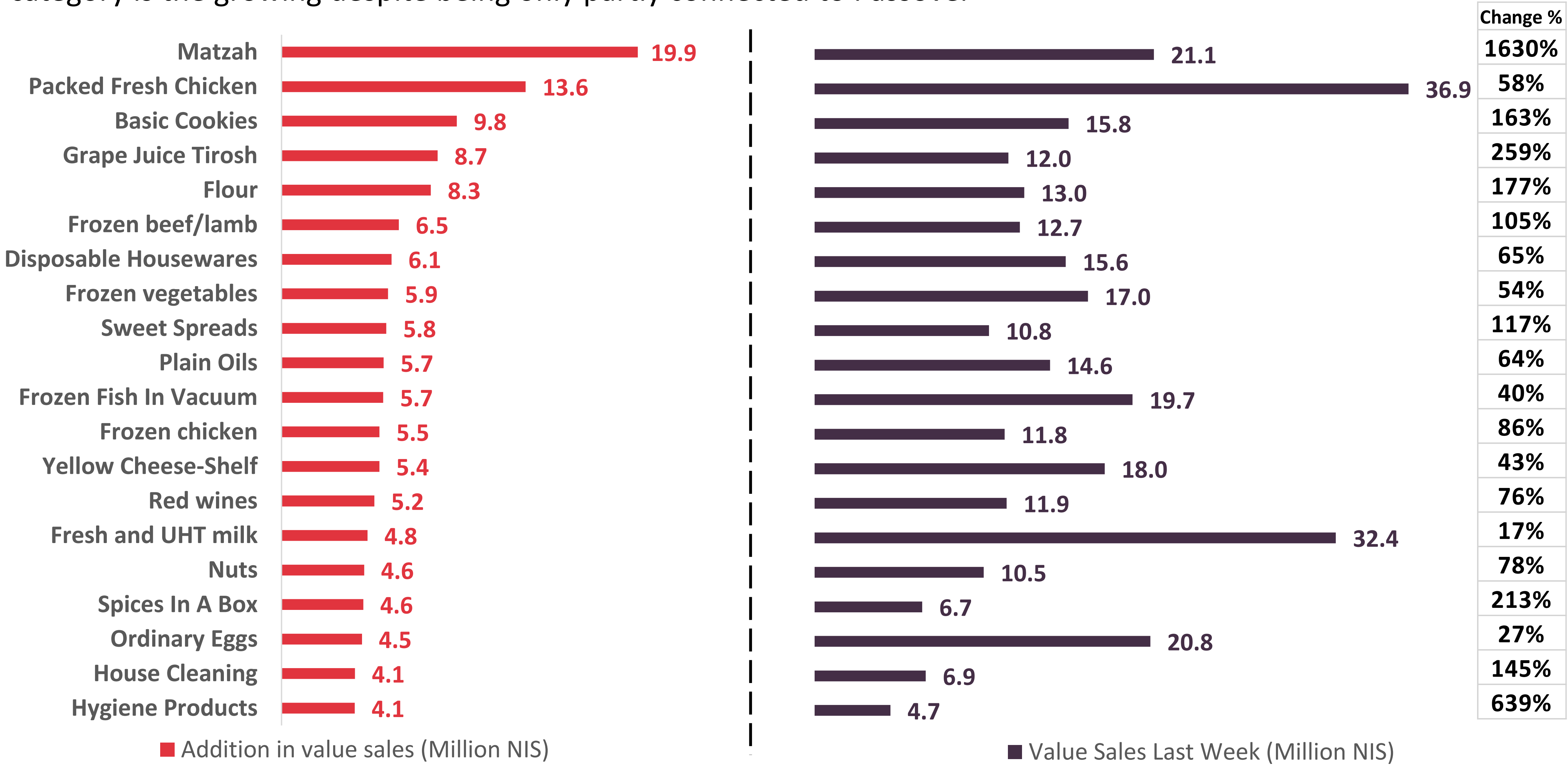
Growing Categories

- The list of the most growing categories is dominated by Passover categories
- Flour category is the growing despite being only partly connected to Passover



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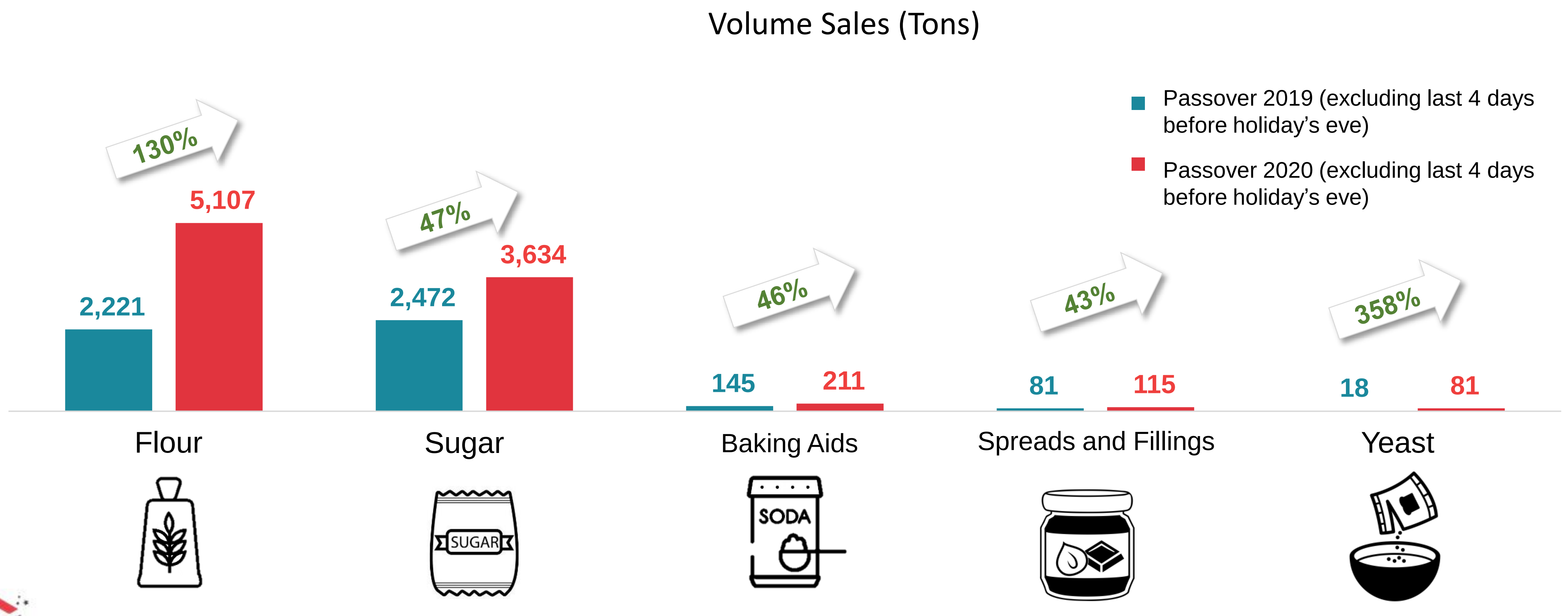
Baking Categories

- Following last week's trend, there is a significant volume growth in Baking categories
- Possible reason for this effect, may be the fact that people spend much more time at home and chose to dedicate some of the free time to baking



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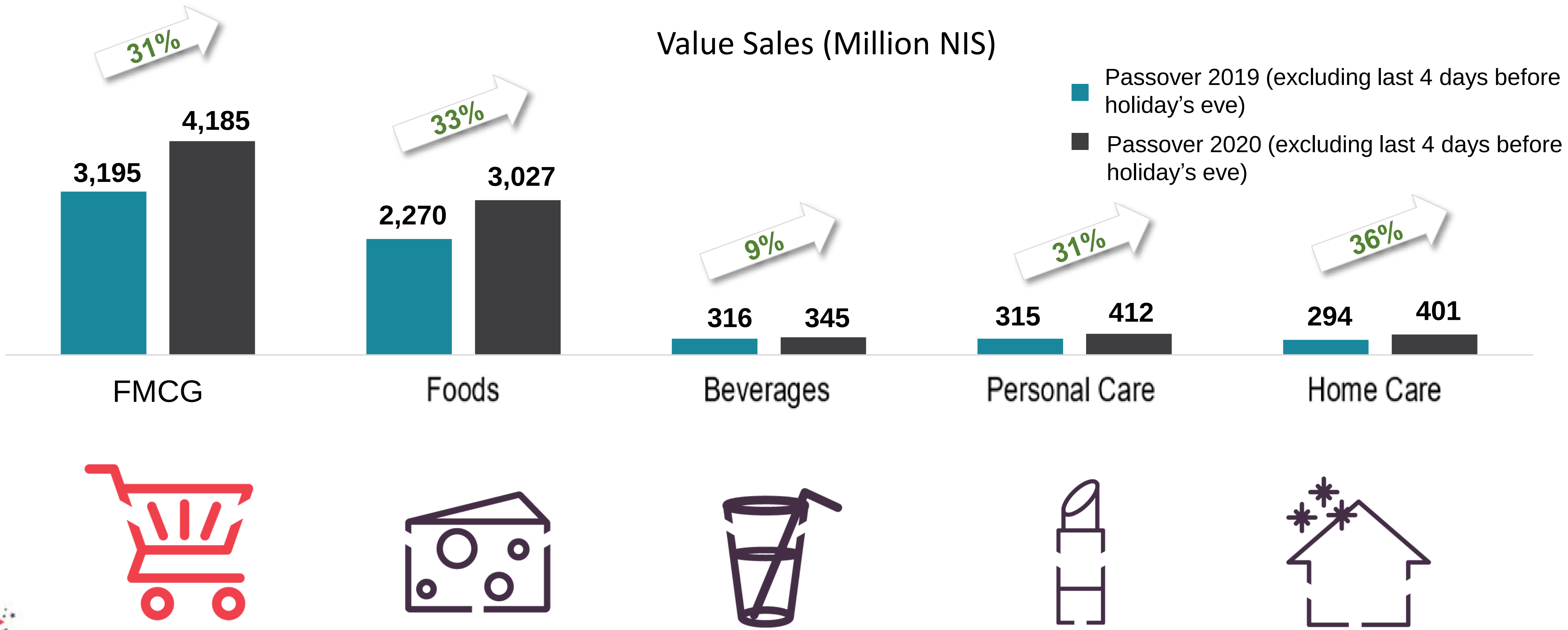
* 2019 - 23/3/19 – 15/4/19
** 2020 – 12/3/20 – 4/4/20

Passover Sales Trend

- Compared to last year's Passover shopping period, there is an increase in sales across all fields that is fueled by the epidemic effects



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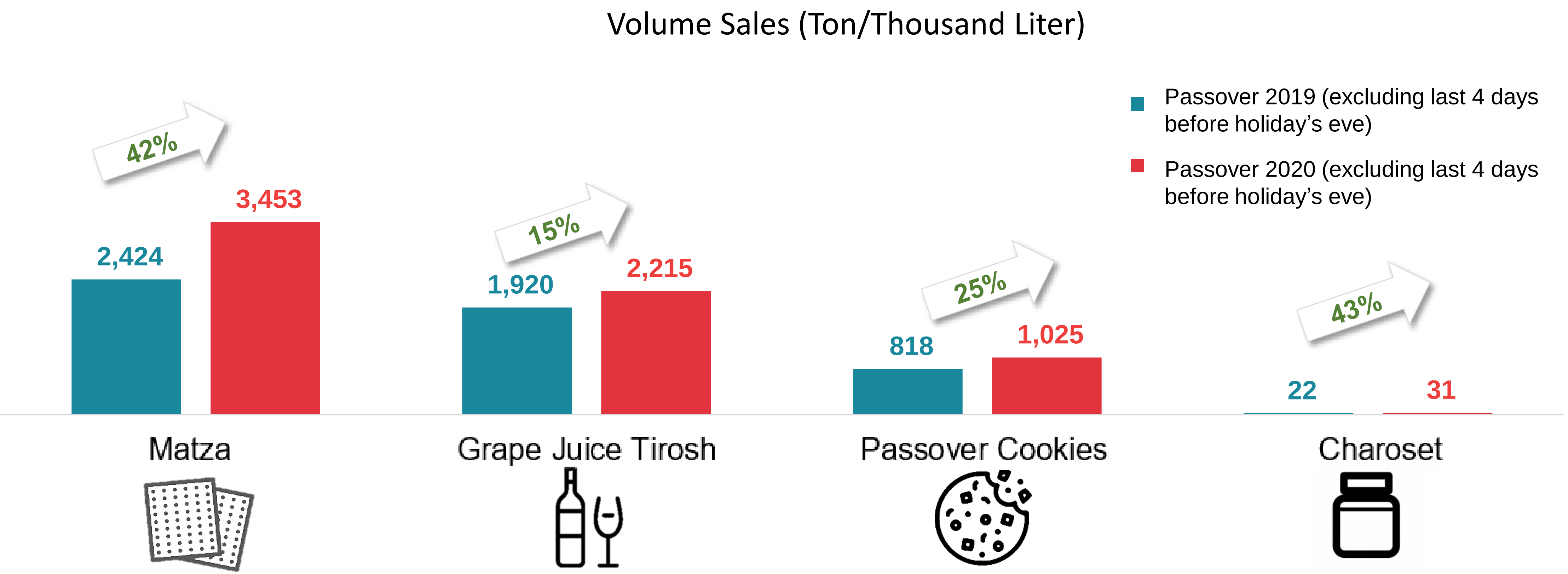
* 2019 - 23/3/19 – 15/4/19
** 2020 – 12/3/20 – 4/4/20

Passover Sales trend

- There is a growth trend of Passover categories in the shopping period of the holiday this year, compared to last year
- The main possible reasons for the growth are shopping in advance as the fear of shortages grows and the fact that much bigger number of households are celebrating at home this year



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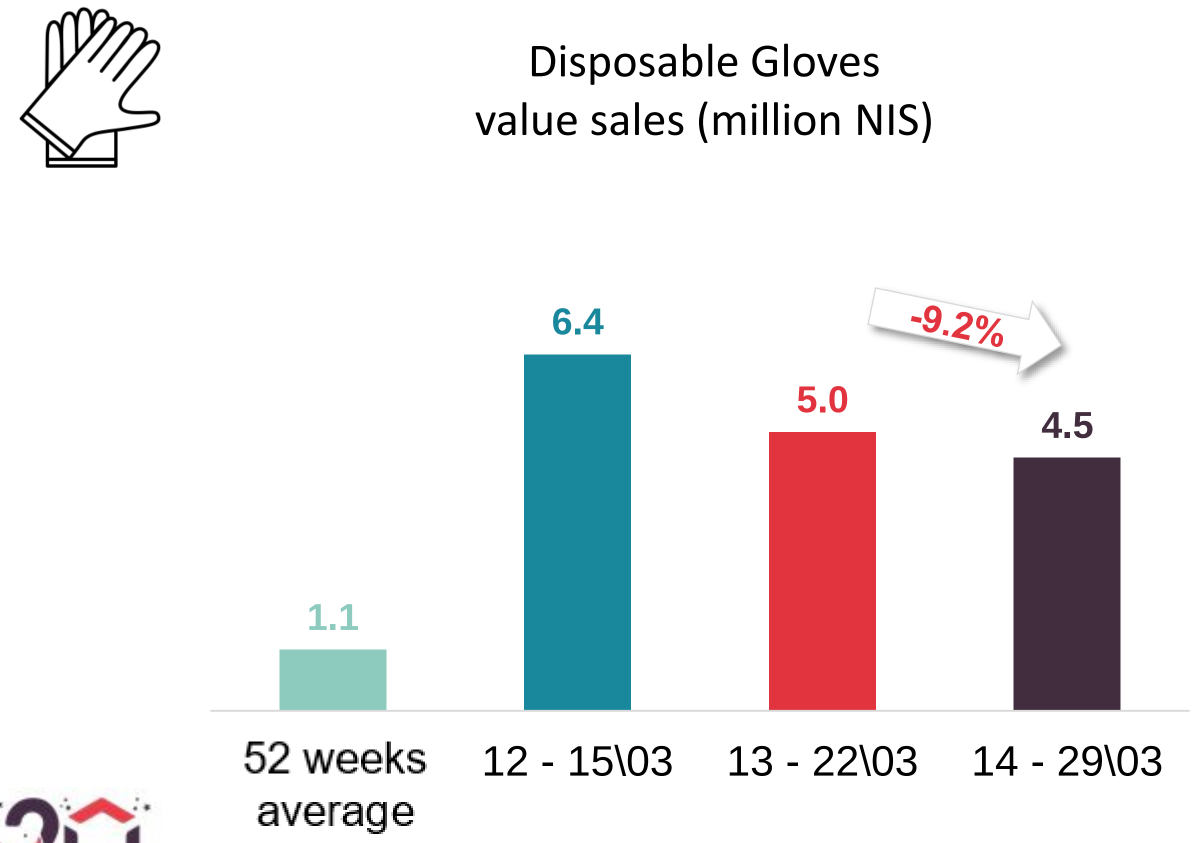
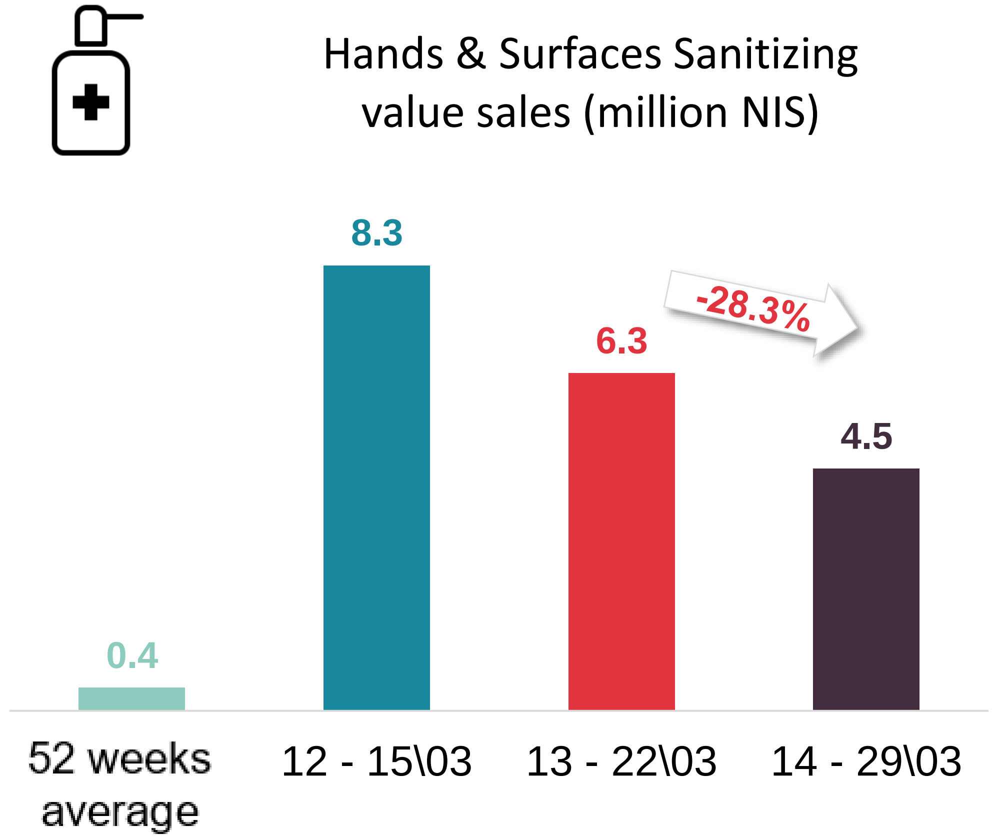
* 2019 - 23/3/19 – 15/4/19
** 2020 – 12/3/20 – 4/4/20
***Volume sales – Matzah (weight), Grape Juice Tirosh (volume), Passover Cookies (weight), Charoset (volume)

Disposable Gloves and Hands & Surfaces Sanitizing

- Hands & Surfaces Sanitizing and Disposable Gloves are the most rapid growing categories in the epidemic period
- The categories continue their week to week decrease trend, but manage to maintain higher sales compared to annual average





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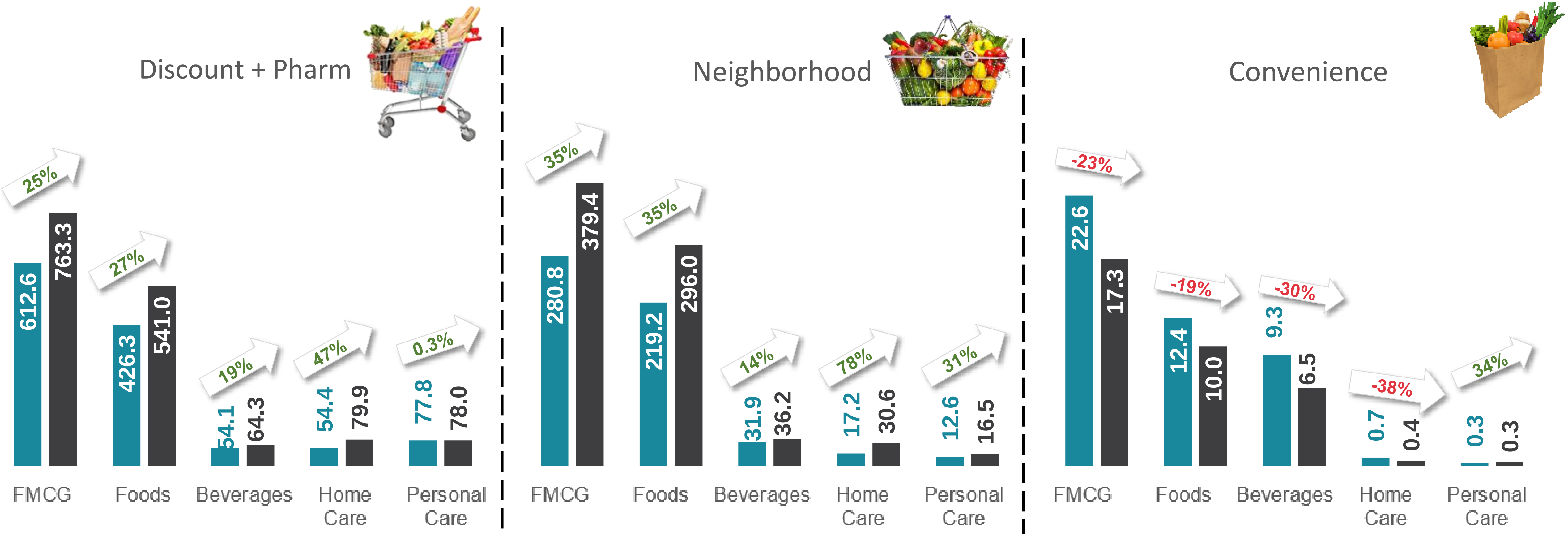
Sales Trend by Channels

➢ Similar to last week's trend, the Neighborhood channel is growing in a higher pace compared to Discount + Pharm



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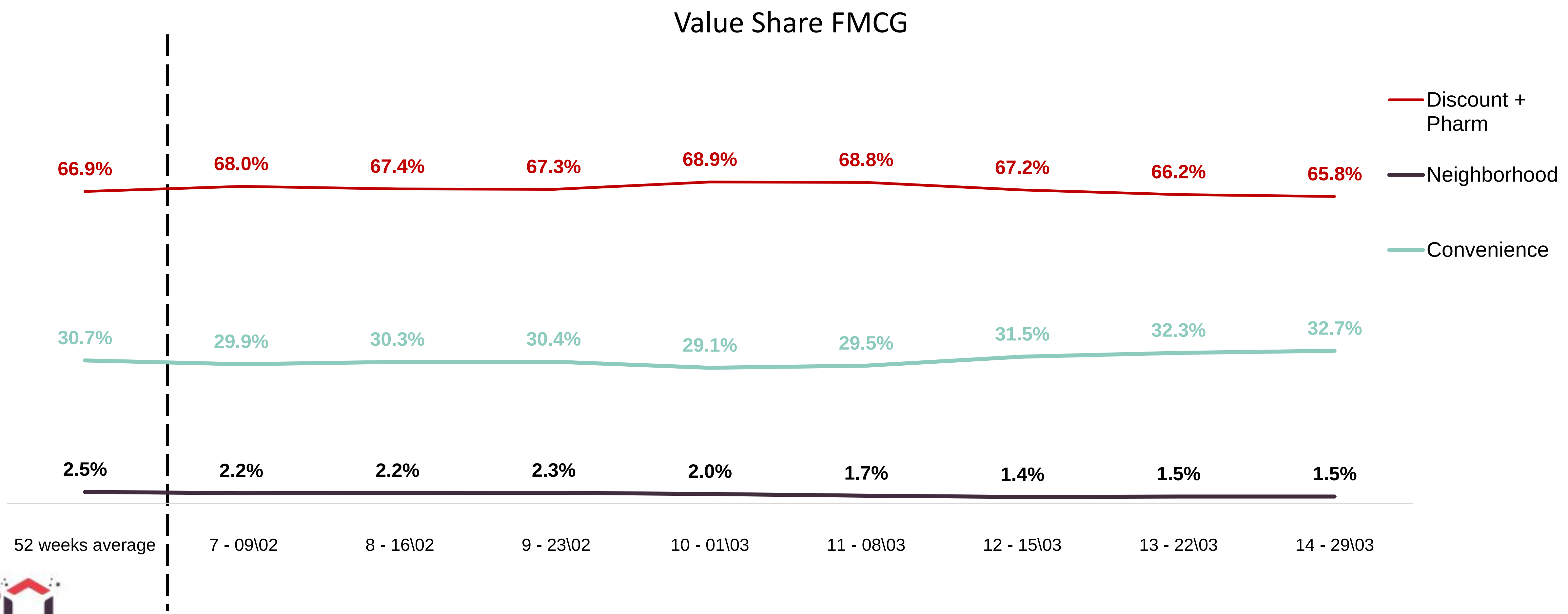
*All the data is compared to 52 weeks average - week 11 2019 to week 10 2020 * *% Change

Channel split

- The share of Neighborhood channel continues to increase for the 5th straight week, as Discount + Pharm's share declines
- After 4 weeks of decreases in value share, there is an increase in sales of the convenience channel which leads to a stagnation is market share



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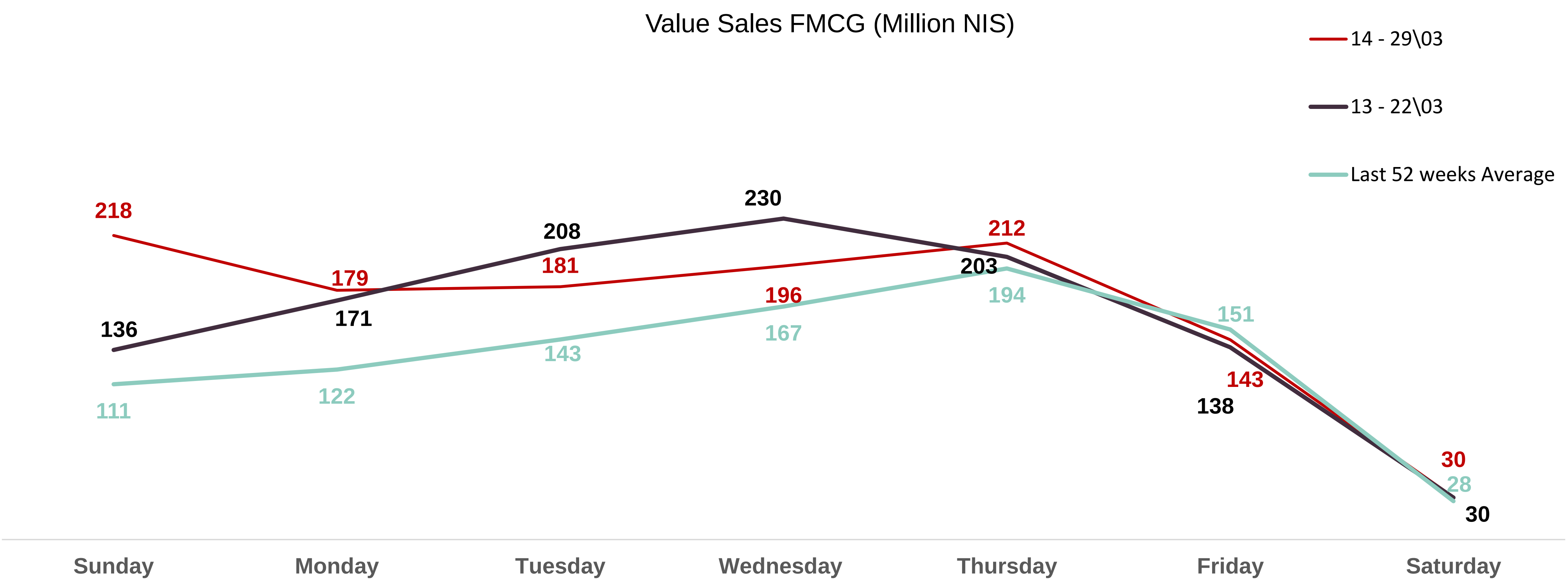
Daily Trend

- Week 14 is marked by higher sales in the beginning of the week as a possible nationwide lockdown was discusses
- The sales are slowing down towards the end of the week, as the decision was made to make only local lockdowns



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Eggs Category - Daily Distribution

- As the reports of shortages continue, there is a sharp decrease in eggs distribution. In every given day, around 20% of the stores didn't sell a single item of eggs

	52 Weeks Average	Week 11	Week 12	Week 13	Week 14
Sunday	92%	93%	86%	80%	75%
Monday	92%	93%	82%	83%	77%
Tuesday	92%	93%	85%	84%	81%
Wednesday	92%	94%	87%	83%	82%
Thursday	92%	94%	89%	84%	84%
Friday	92%	94%	82%	79%	79%
Saturday	91%	86%	61%	53%	50%

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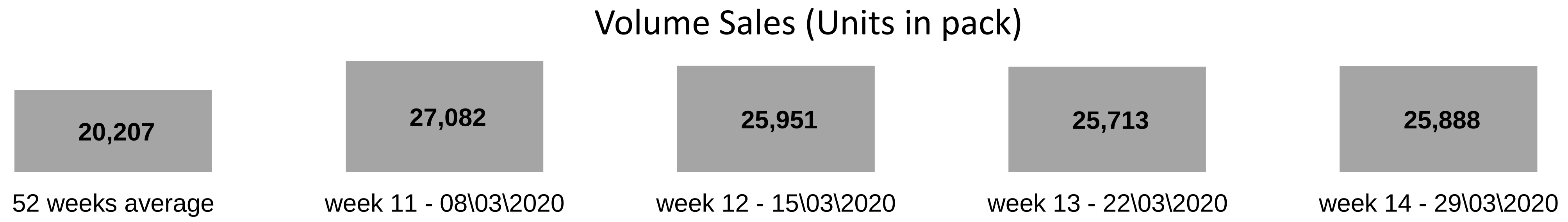
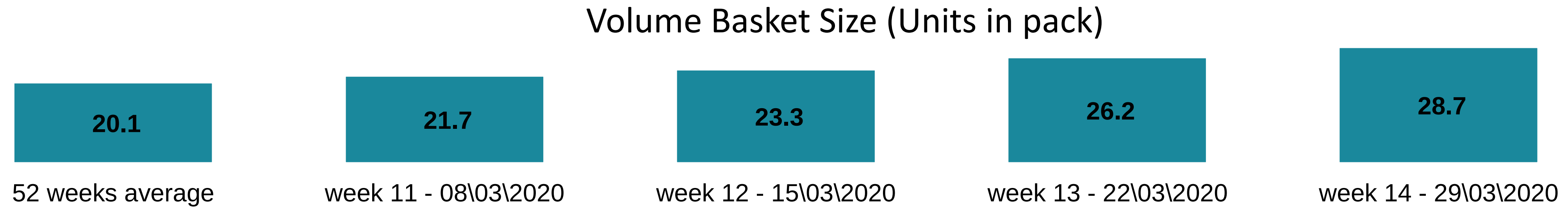
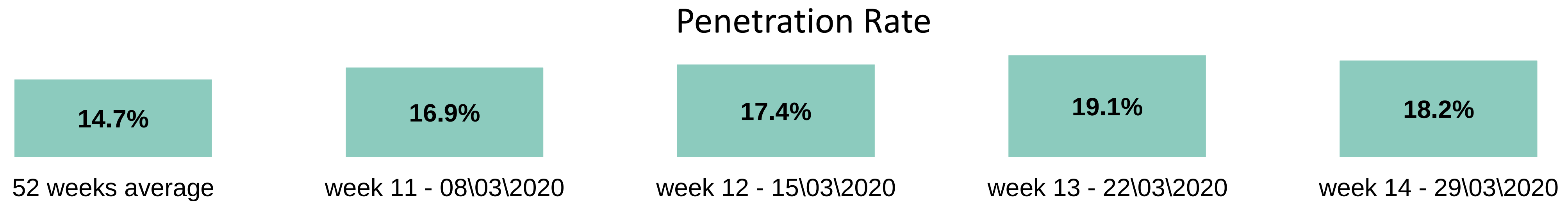
Eggs Category – Sales, Penetration and Basket Size

- Despite shortages in some of the stores and lower penetration compared to week 13, there is an increase in volume sales
- The volume increase comes from the steady growth in volume basket size







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Thanks!

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