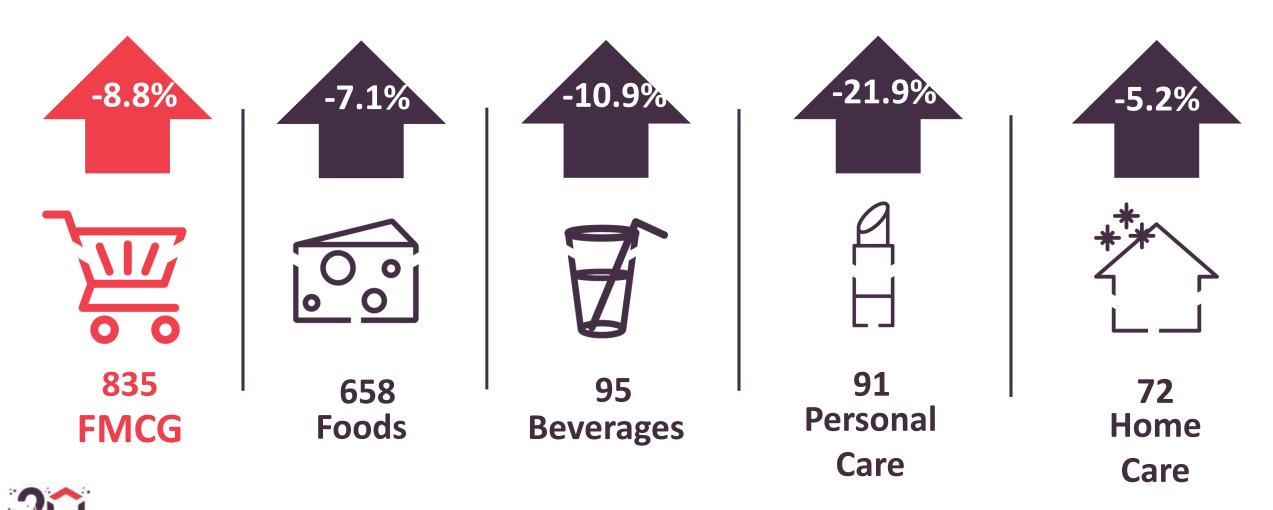


FMCG Market Trend vs Average MAT

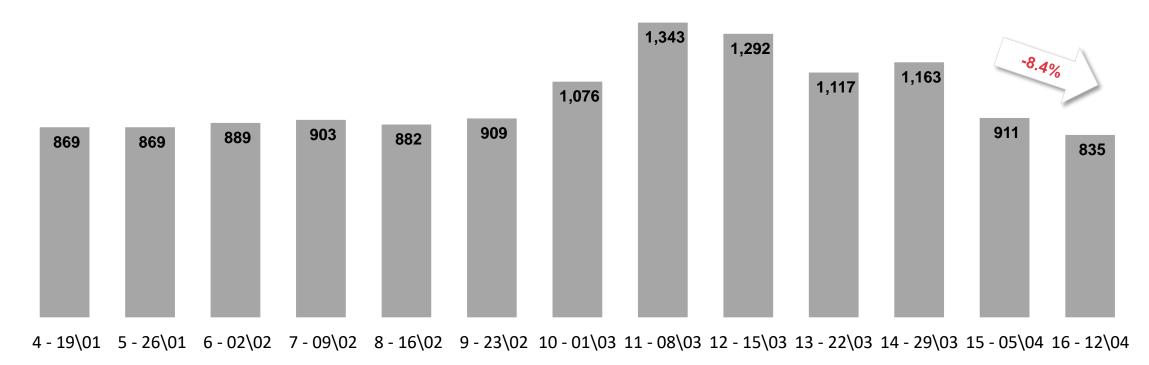
- ➤ Week 16 marks an 8.8% decrease compared to 52 weeks average (based on 52 weeks until week 10 included)
- > The decrease is comes from a reduced number of business days due to Passover



FMCG – Weekly Trend

- ➤ Week 16 marks an 8.4% decrease compared to week 15 and by this becomes the week with lowest sales in 2020
- The low sales are caused by Passover holiday and fewer selling days

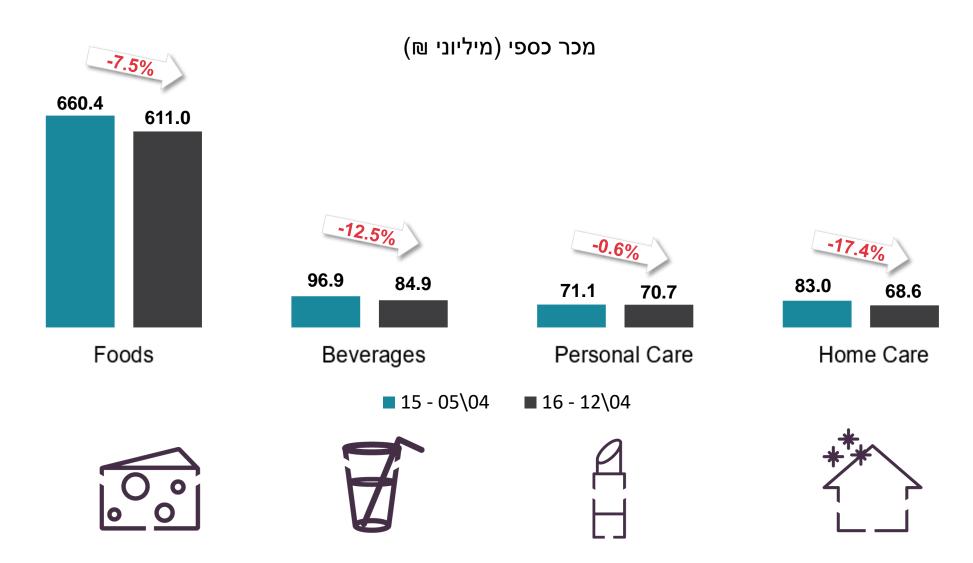
Value Sales FMCG – Million NIS





FMCG trend vs last week

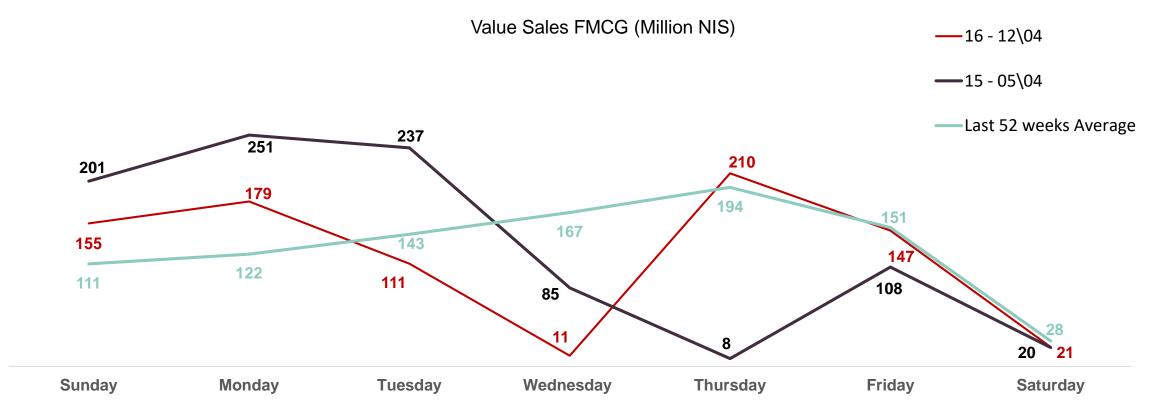
> The decline in week 16 comes from all the fields, as the decrease in Personal Care is the most moderate





Daily Trend

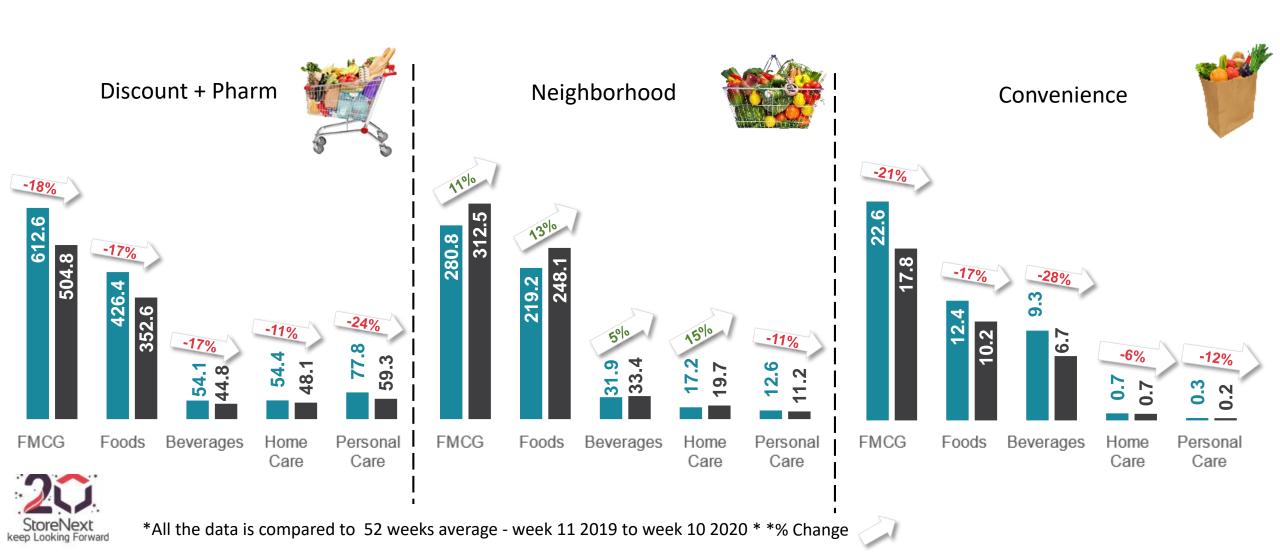
- Sunday and Monday (Hol-Ha-Moed) are marked by lower sales compared to the same days last week,
- but are still 50% higher than annual average
- > The trend in Tuesday and Wednesday (second holiday) is similar to the trend of last Wednesday and Thursday (first holiday)
- The increase in sales on Thursday (after the end of Passover) comes as sales of Hametz (Non-Kosher for Passover) resume





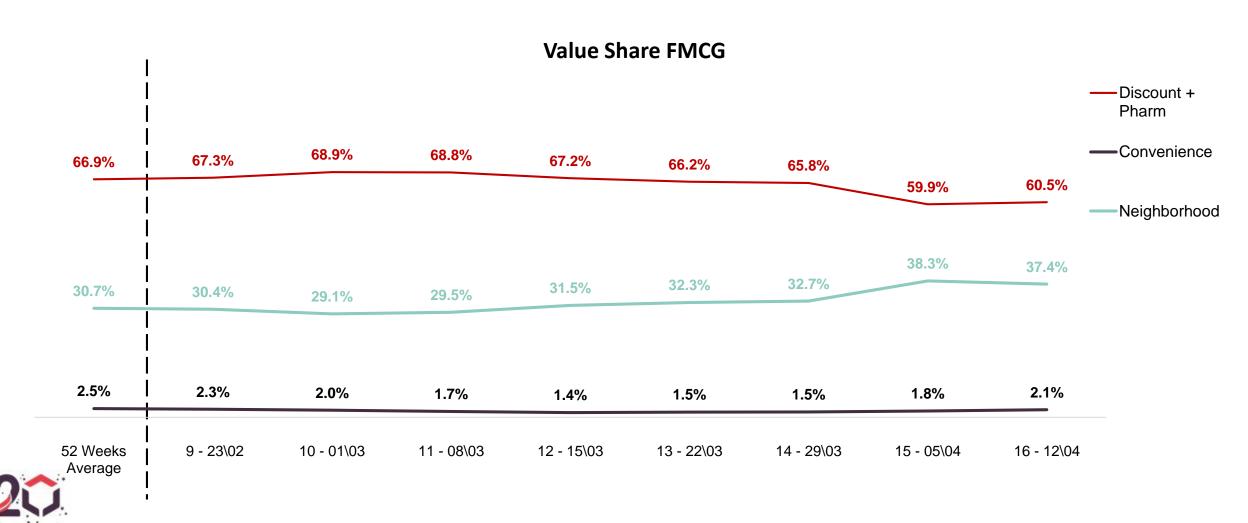
Sales Trend by Channels

> The trend from last weeks continues as the Discount + Pharm channel is decreasing compared to annual average and Neighborhood channel continues to grow



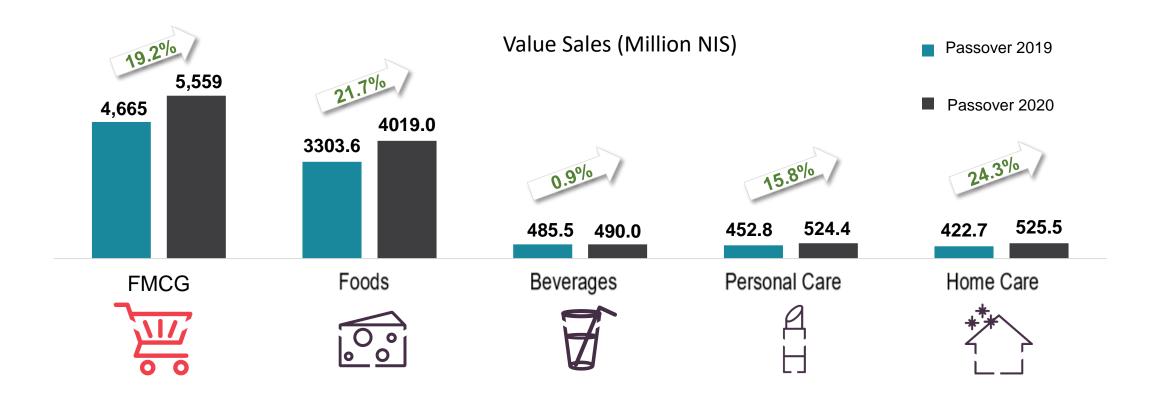
Channel split

- > The decline in sales of Neighborhood channel compared to last week is sharper than the decline of Discount+Pharm
- ➤ The Convenience channel reaches 2.1% share it's highest since the beginning of COVID-19 outbreak



Passover Sales Trend

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



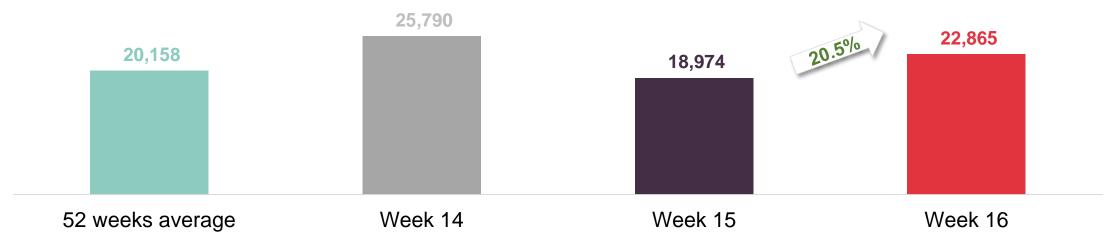
^{*} Passover 2019 - 23/3/19 – 26/4/19 StoreNext ** Passover 2020 – 12/3/20 – 15/4/20

Eggs sales trends

- ➤ Week 16 marks an increase of 20.% in volume sales of eggs compared to last week
- ➤ In addition there is an 13.4% increase compared to annual average, despite fewer selling days



Volume Sales (Thousand Units in Pack)





Eggs Category - Daily Distribution

> The distribution of eggs is improving compared to last week and leads to the increase in volume sales, but is still much lower than annual average

₩ —	52 Weeks Average	Week 11	Week 12	Week 13	Week 14	Week 15	Week 16
Sunday	92%	93%	86%	80%	75%	75%	80%
Monday	92%	93%	82%	83%	76%	80%	86%
Tuesday	92%	93%	85%	84%	81%	83%	88%
Wednesday	92%	94%	87%	83%	82%	80%	56%
Thursday	92%	94%	89%	84%	83%	56%	85%
Friday	92%	94%	82%	79%	79%	77%	85%
Saturday	91%	86%	61%	53%	50%	51%	66%

Thanks! StoreNext Looking Forward