



# February 2021 Summary

Main Trends In The Israeli FMCG Market

# Data Base

The data is based on **2,600 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 more than **85% of the total sales in the Israeli 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 Kiosks and the Arab sector



# Long Story Short

- 🏠 FMCG market records an increase of 5.3% value sales in current YTD compared to previous YTD
- 🏠 In February 2021, FMCG value sales rise in 6.7% and in neutralizing change in sales days, increase stands at 7.3%



- 🏠 StoreNext's Price Index presents an increase of 0.1 points in current YTD compared previous YTD
- 🏠 Beverages and Home Care fields show a Price Index decline, Food field marks a moderate growth, while Personal Care presents a stagnation

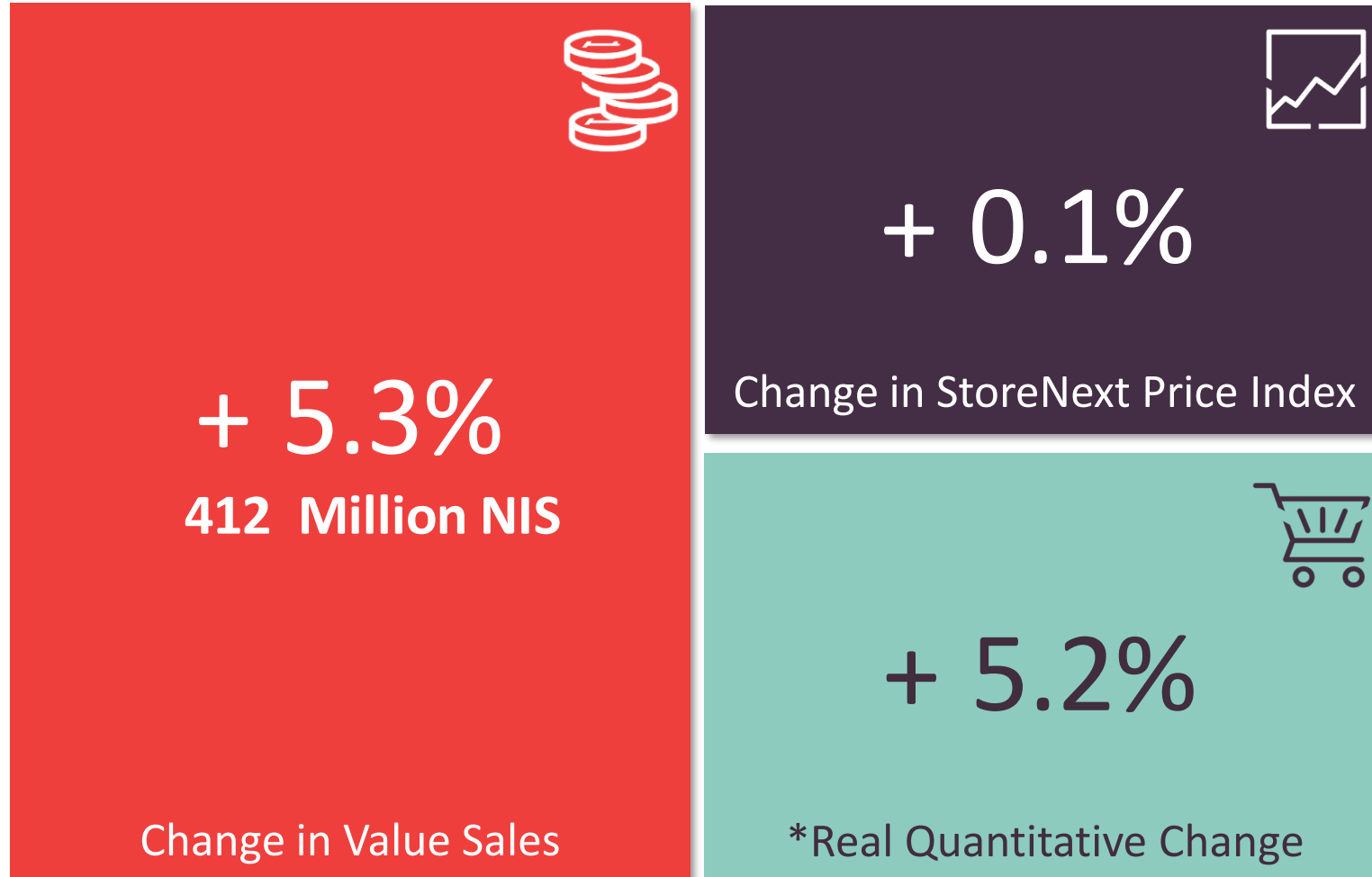


- 🏠 Purim Timing is strengthening Chocolate World, Candies, Snacks, Wines, Beer and Alcoholic Drinks
- 🏠 The growth of Baking & Cooking Aids and Cleaning categories continues, as part of COVID-19 trends, while Personal Care categories and Laundry Detergents decrease



# Change in Sales and Price Indices

FMCG, YTD 2021 compared to YTD 2020



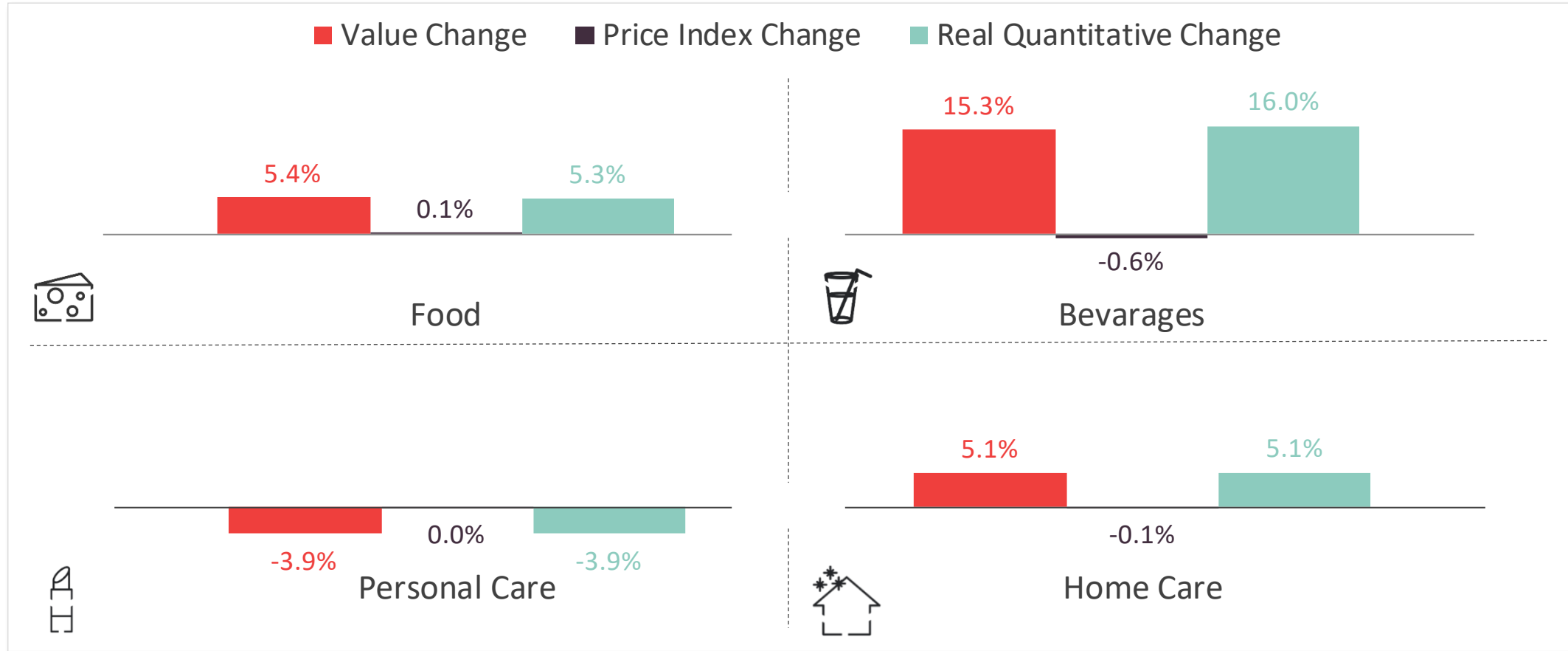
\* Real Quantitative Change – Value sales growth deducting StoreNext Price Index changes (neutralized of mix effects)

# FMCG YTD Change Rate By Fields (2020 VS 2021)



- Except of Personal Care, all fields record real growth while Beverages shows the most significant one
- Price index shows a mixed trend with an increase in Food, a decline in both Beverages and Home Care, and a stagnation in Personal Care

\* Real Quantitative Change – Value sales growth deducting StoreNext Price Index changes (neutralized of mix effects)

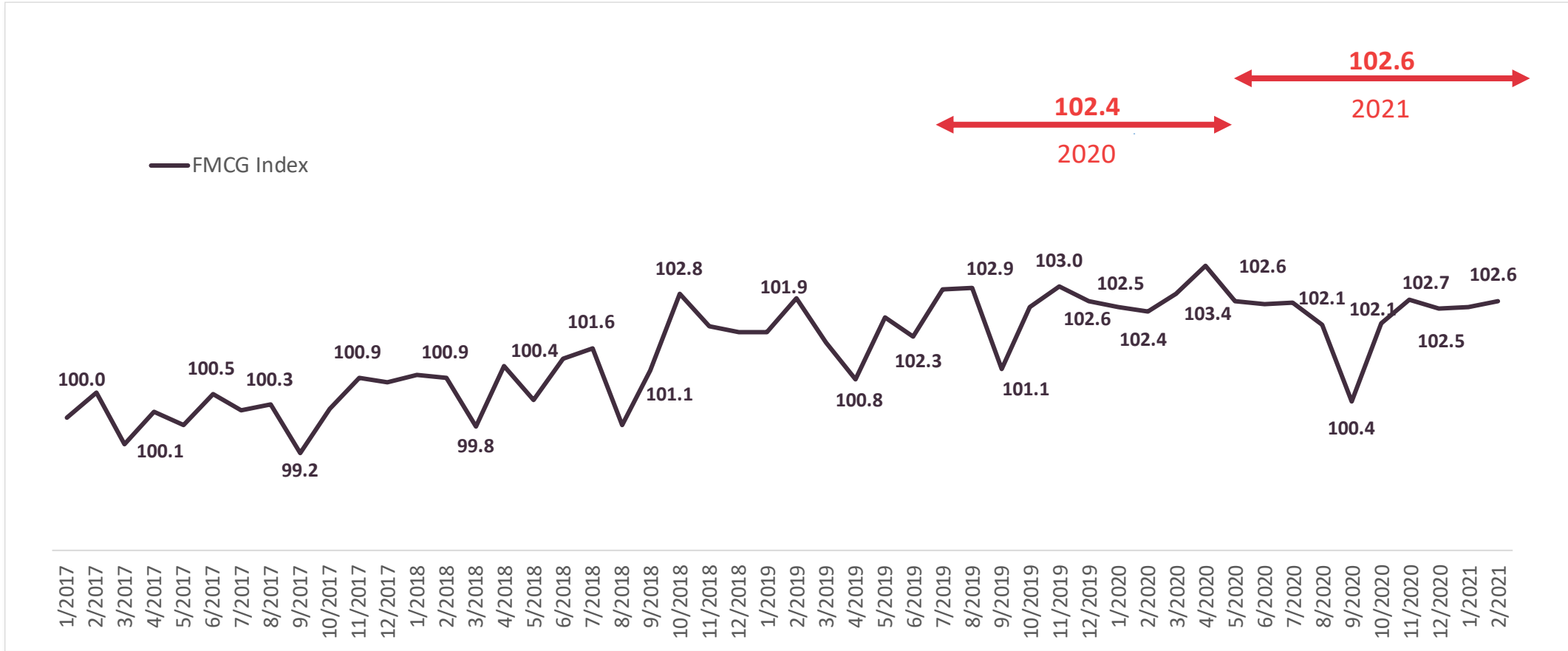


# The StoreNext Price Index

StoreNext's Price Index presents an increase of 0.1 points in current YTD compared to previous YTD



\* StoreNext Price Index measures the change in product prices, neutralizing sales mix changes

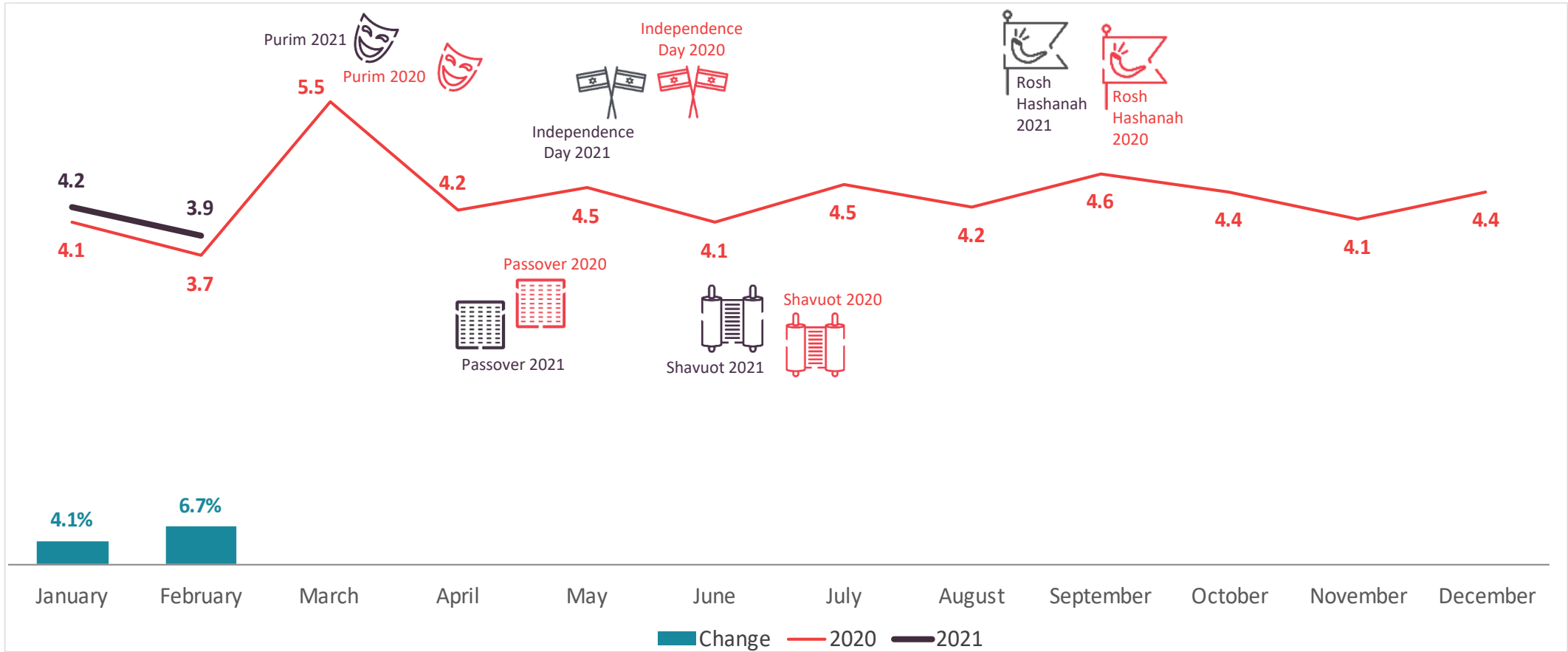


# Monthly Sales Trend

🏠 In February 2021, FMCG value sales rise in 6.7% compared to February 2020, and amounted to 3.9 Billion NIS, addition of 244 Million NIS



\* FMCG Value Sales, Billion NIS

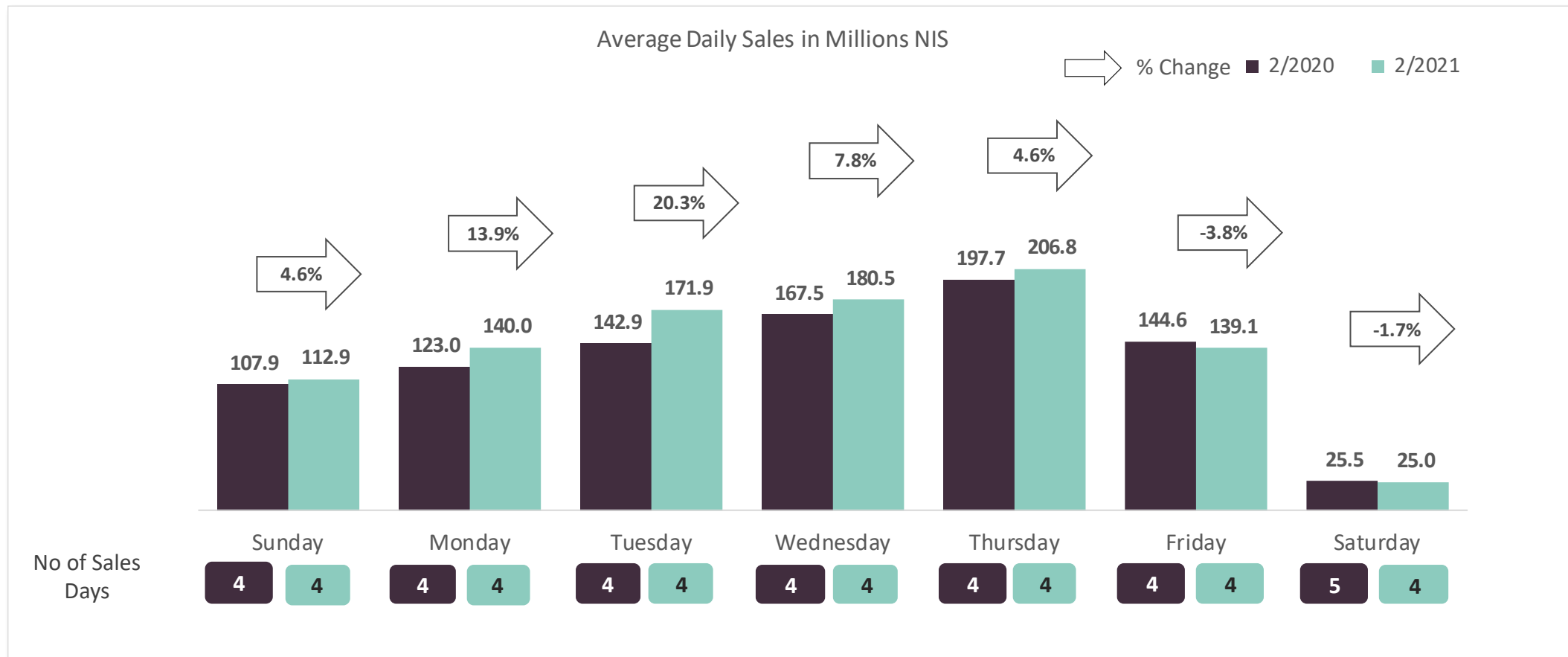


# Sale By Days

- 📅 Monthly change rate is hurt due to decline in sales days - February 2020 includes 29 days
- 📅 Neutralizing change in sales days, February 2021 value growth stands at 7.3% - less then recent months' sales change



\* Sales (NIS Million) by days and percentage of change in sales, current month compared to the same period last year



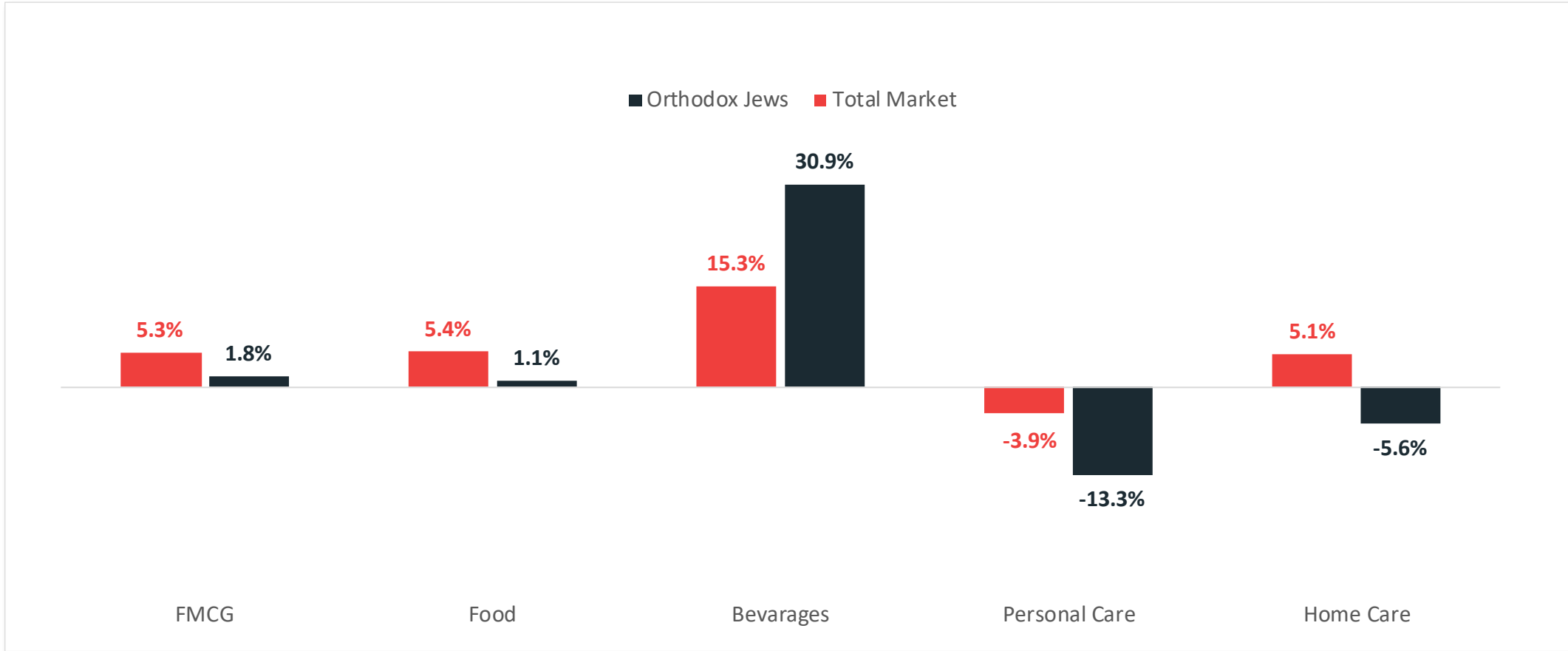


# Orthodox Jews Sector Value Change Rate

- Orthodox Jews sector records a lower growth compared to total market in current YTD – in both total FMCG and its fields, except Beverages
- In Home Care field, Orthodox Jews sector marks contrary change trend in comparison to total market

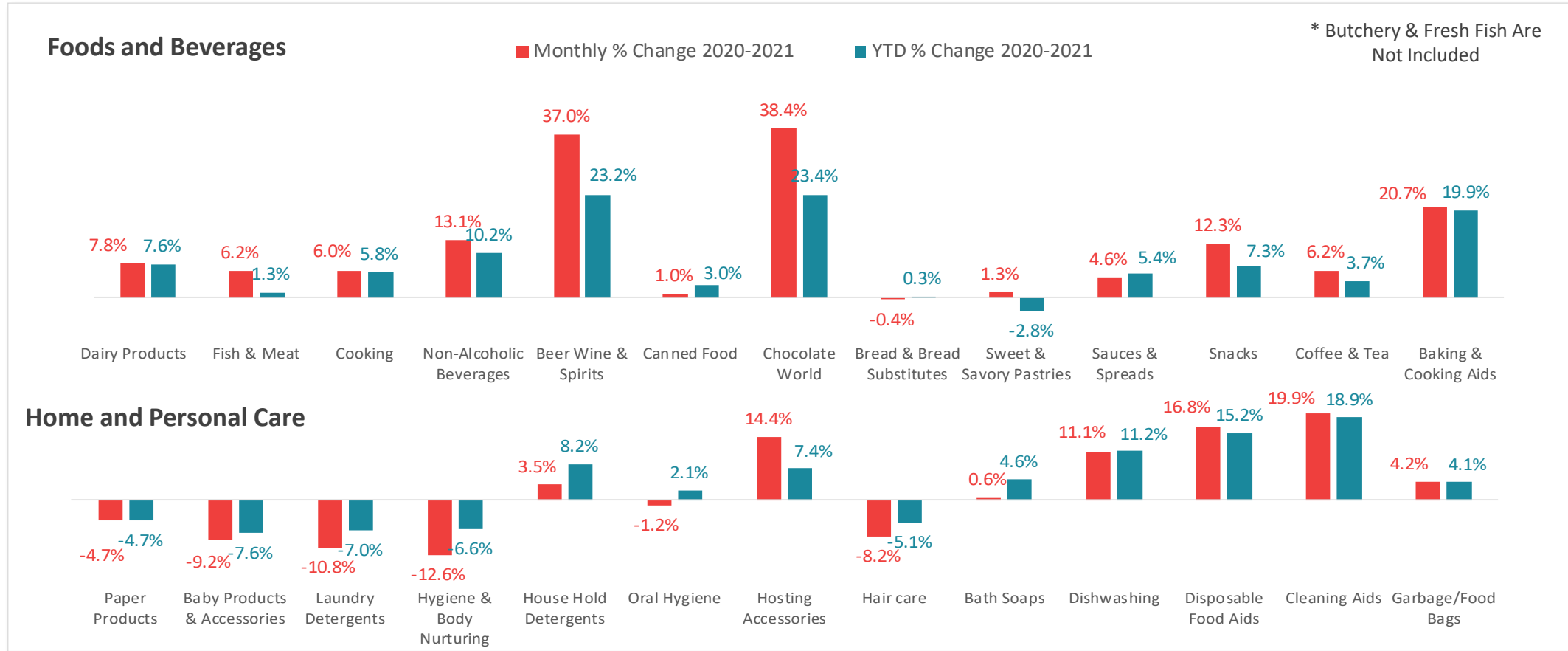


\*Orthodox Jews– only stores with orthodox attributes, that are reflected in location, chain and basket composition, excluding Orthodox Jews population sales in General sector



# Value Sales Change in Key Fields

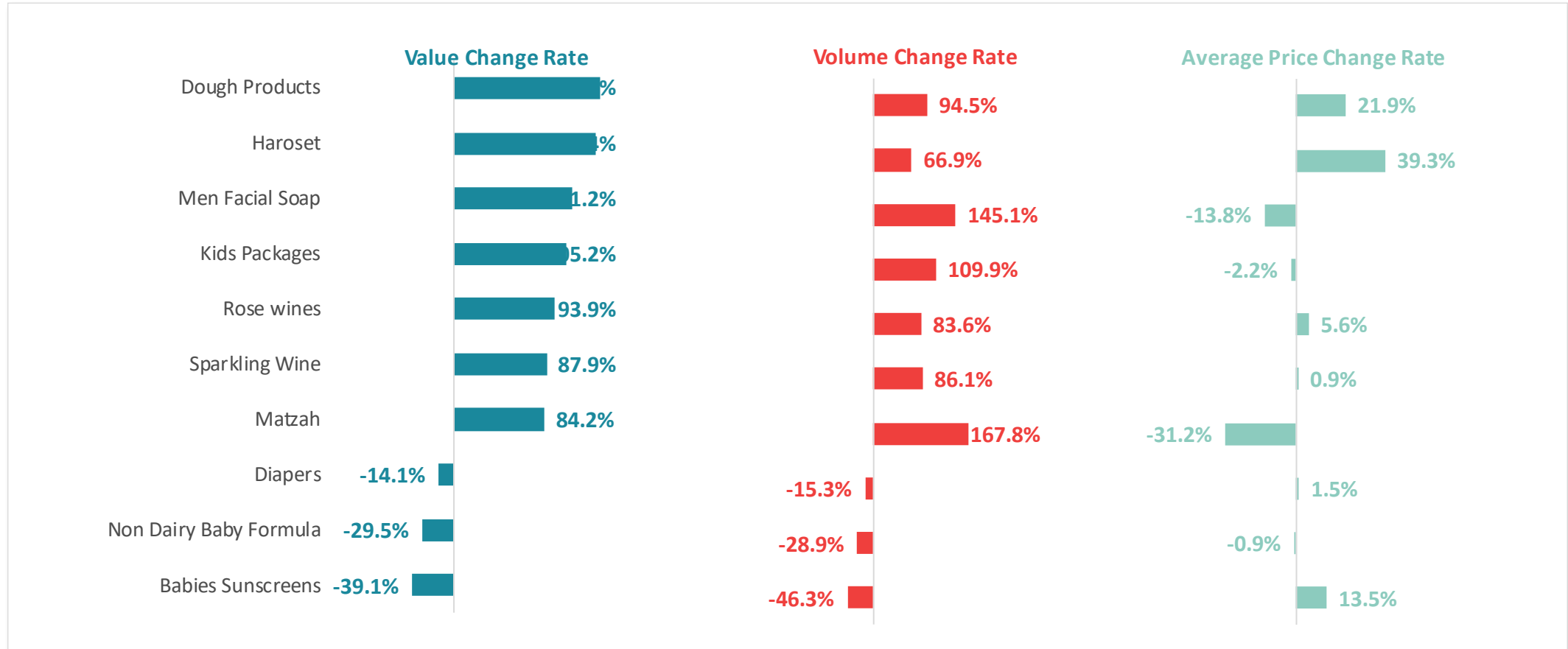
The most significant growth in Food and Beverages fields record in Chocolate World and Beer Wine & Spirits, accordingly Purim timing. Covid-19 trends continue – a growth of Baking & Cooking Aids and Cleaning categories and a decline in Personal Care categories and Laundry Detergents



# Rising / Descending Categories – Current Month TY vs LY

📈 Among rising categories- Haroset, Kids Packages, Rose Wine, Sparkling Wine and Matzah – following Purim and Passover timing

📉 Among descending categories- Non Dairy Baby Formula, Babies Sunscreens and Diapers – babies care categories



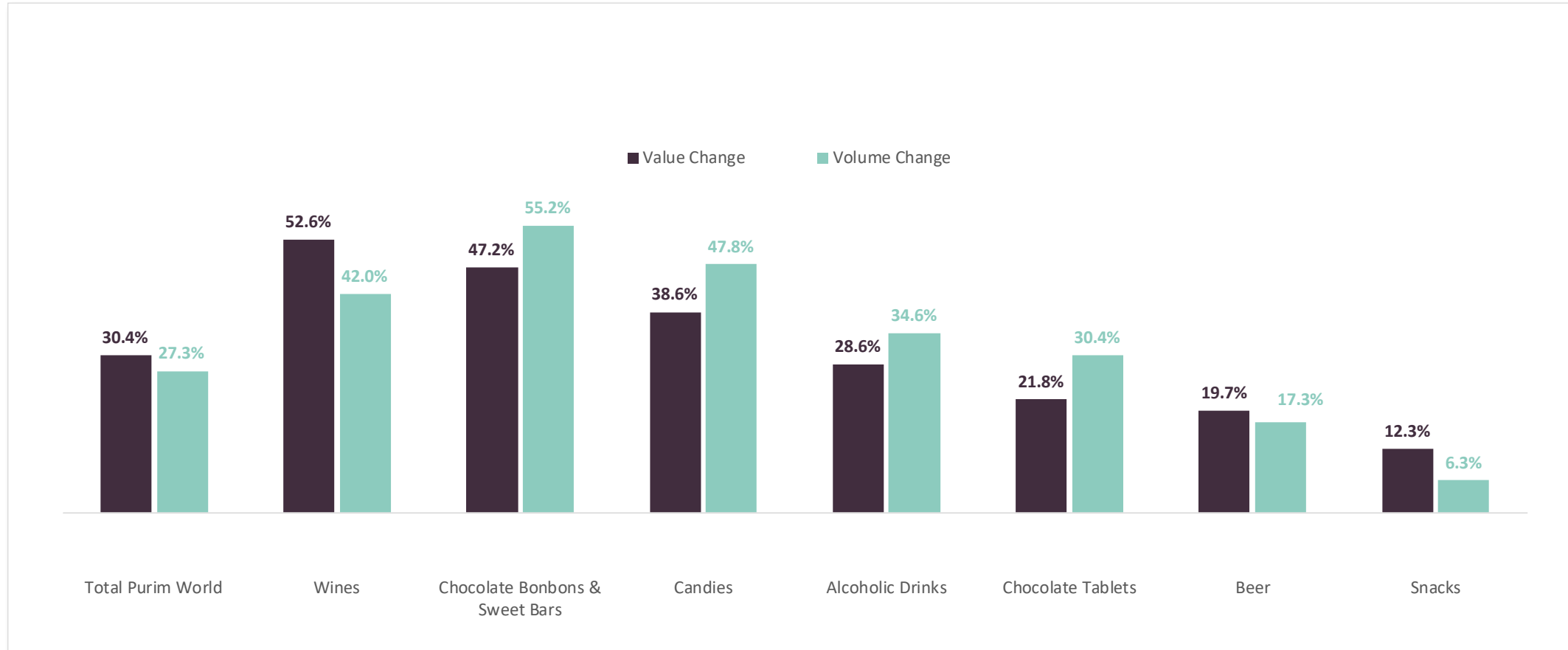
# Purim 2021

🔗 Purim World categories present a significant increase in February 2021, compared to February 2020, as a result of holiday timing changes



🔗 A part of Wine category increase probably came from Passover shopping

\* Purim World includes classes: Wines, Alcoholic Drinks, Beer, Chocolate Bonbons & Sweet Bars, Candies, Chocolate Tablets and Snacks

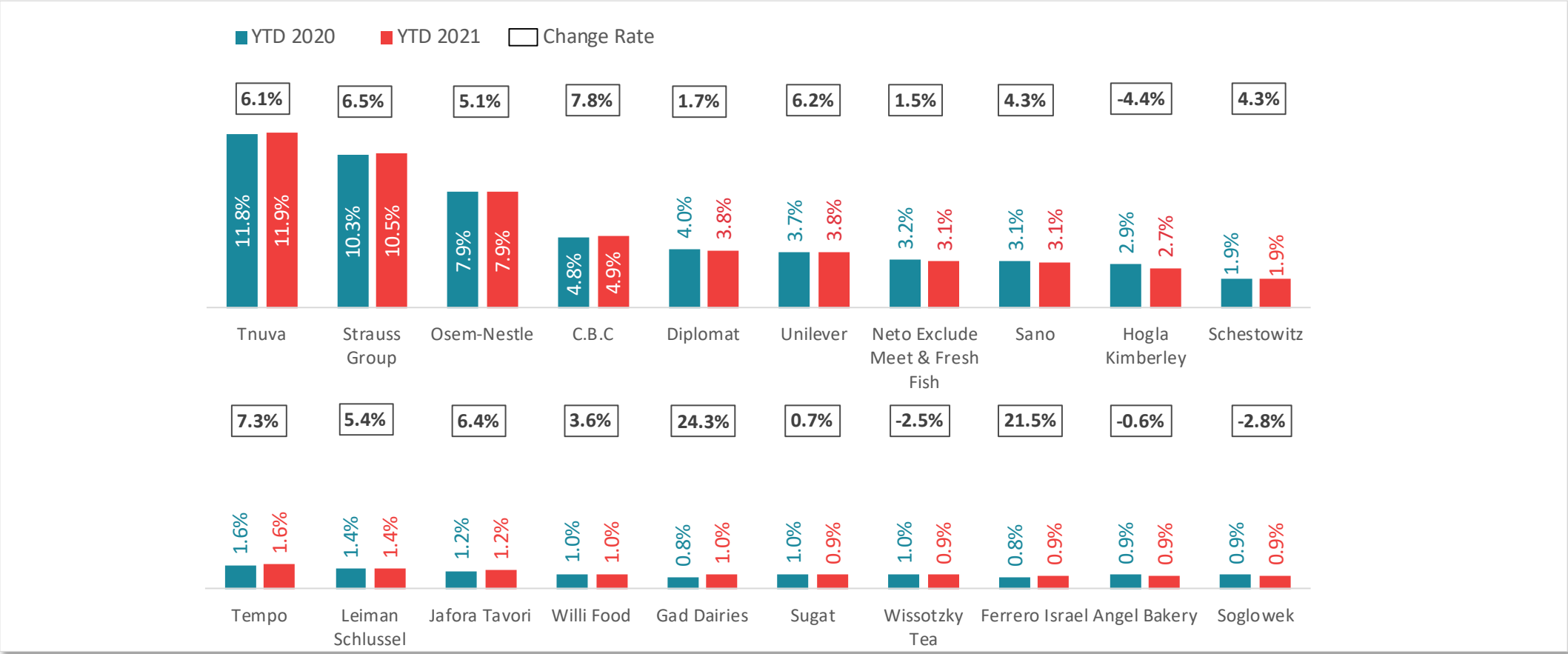


# Market Share and Suppliers' Growth



- Top 20's SOM reaching 64.3% in current YTD, records a decline of 0.2 points compared to YTD 2020
- Top 10's SOM stands at 53.5% in current YTD and presents a decreasing of 0.3 compared to previous period

\* Value Shares (FMCG Market- Excluding Butchers, Bakery, Fruits and Vegetables and Cigarette data)

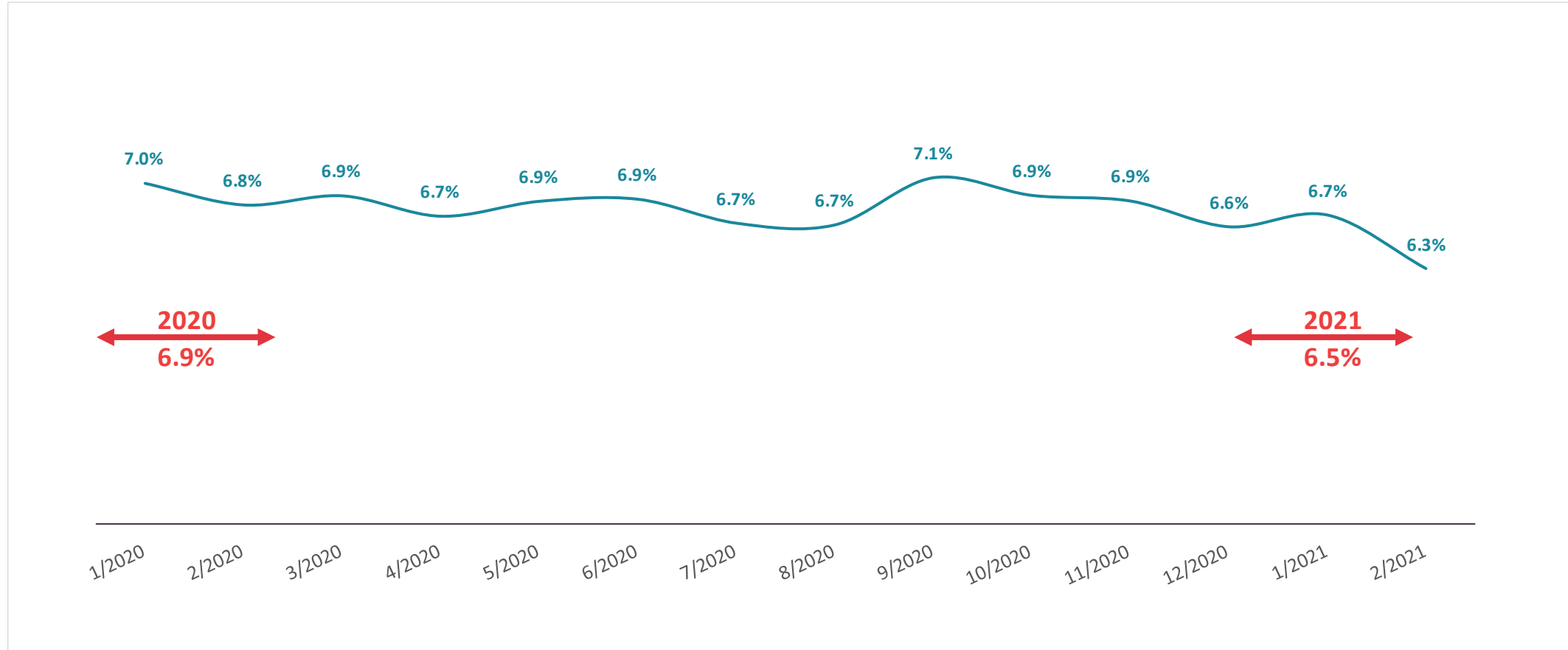


# Private Label Market Share - FMCG Market

Private label share records a drop of 0.4 points in current YTD in comparison previous YTD



\* Value Share (FMCG Market- Excluding Butchers, Bakery, Fruits and Vegetables and Cigarette data)



# Thank You!



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StoreNext

Looking Forward