



April 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 a decrease of 3.4% value sales in current YTD compared to previous YTD
- ❏ In April 2021, FMCG value sales drop by 0.8% and when neutralizing change in sales days, change stands at 0.1%



- ❏ StoreNext's Price Index presents a decrease of 0.4 points in current YTD compared previous YTD
- ❏ Beverages, Home Care and Personal Care fields show a Price Index decline, while Food field marks a moderate growth



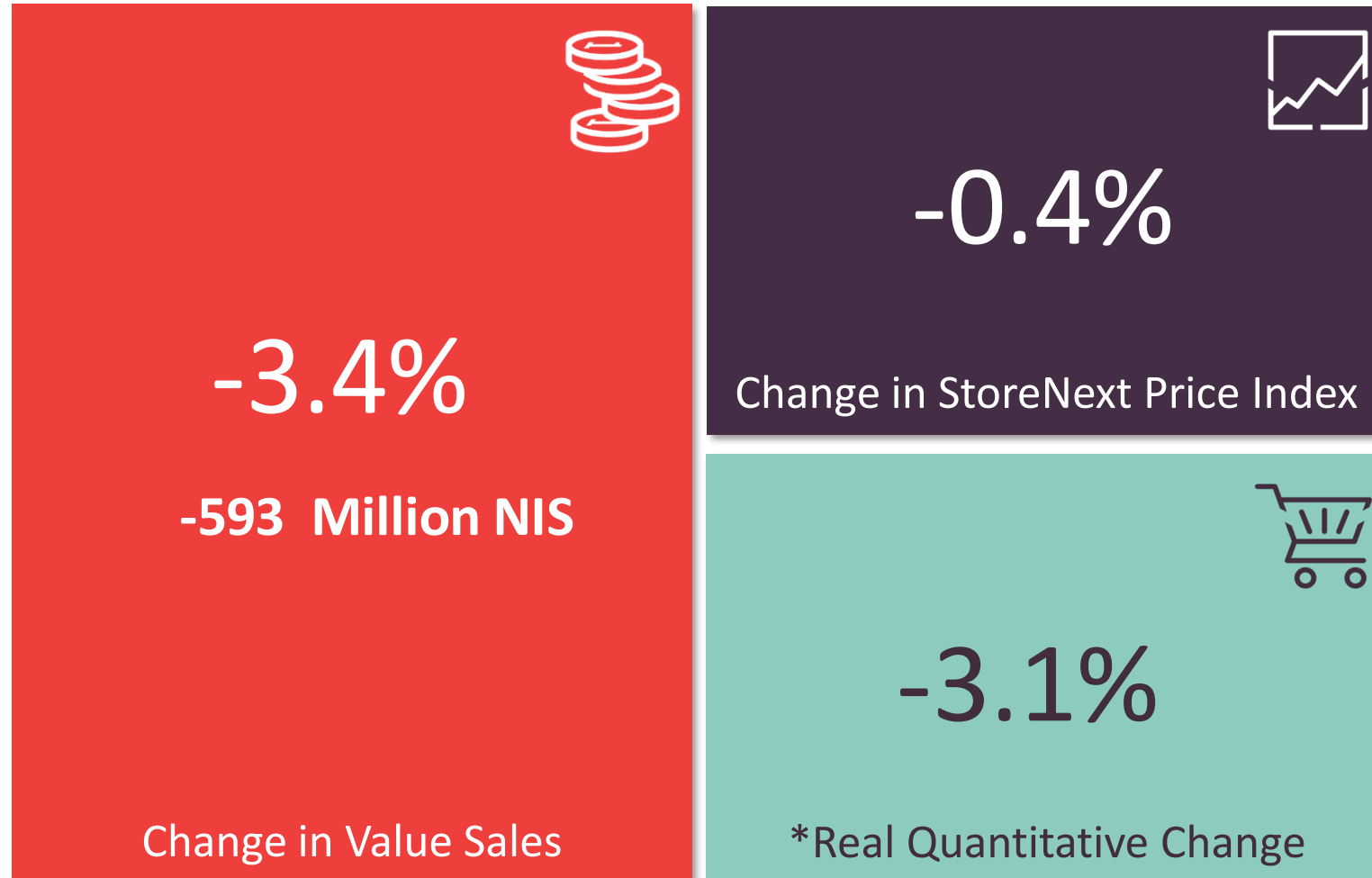
- ❏ Following COVID-19 declining trend, Baking & Cooking Aids, alongside Sauces & Spreads and Beer Wine & Spirits worlds show a decrease in April 2021, compared to April 2020
- ❏ Cleaning world, Disposable Food Aids and Hosting Accessories are dropping



Change in Sales and Price Indices



FMCG, YTD 2021 compared to YTD 2020



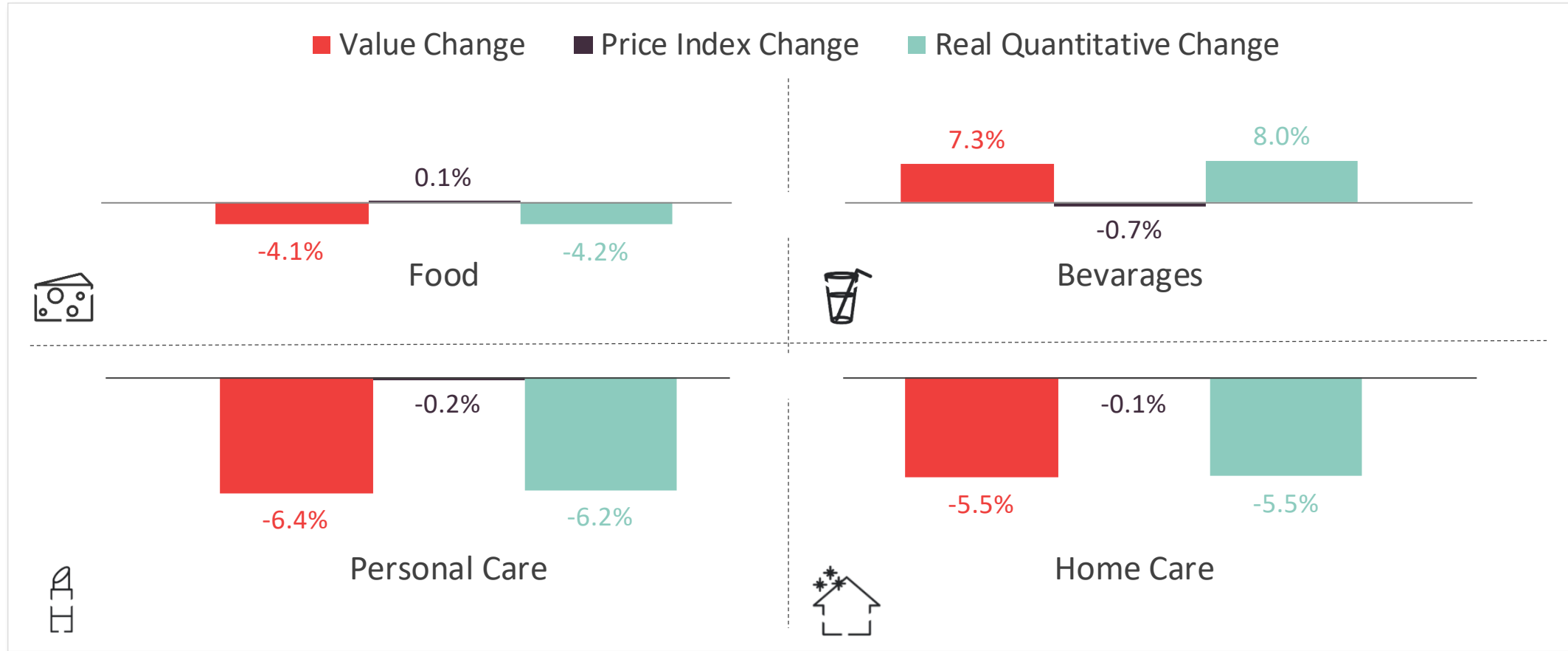
* Real Quantitative Change – Value sales growth deducting StoreNext Price Index changes (neutralized of mix effects)

FMCG YTD Change Rate By Fields (2020 VS 2021)

- Except of Beverages, all fields record real decline while Personal Care shows the most significant one
- Beverages, Home Care and Personal Care fields show a Price Index decline, while Food field marks a moderate growth



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

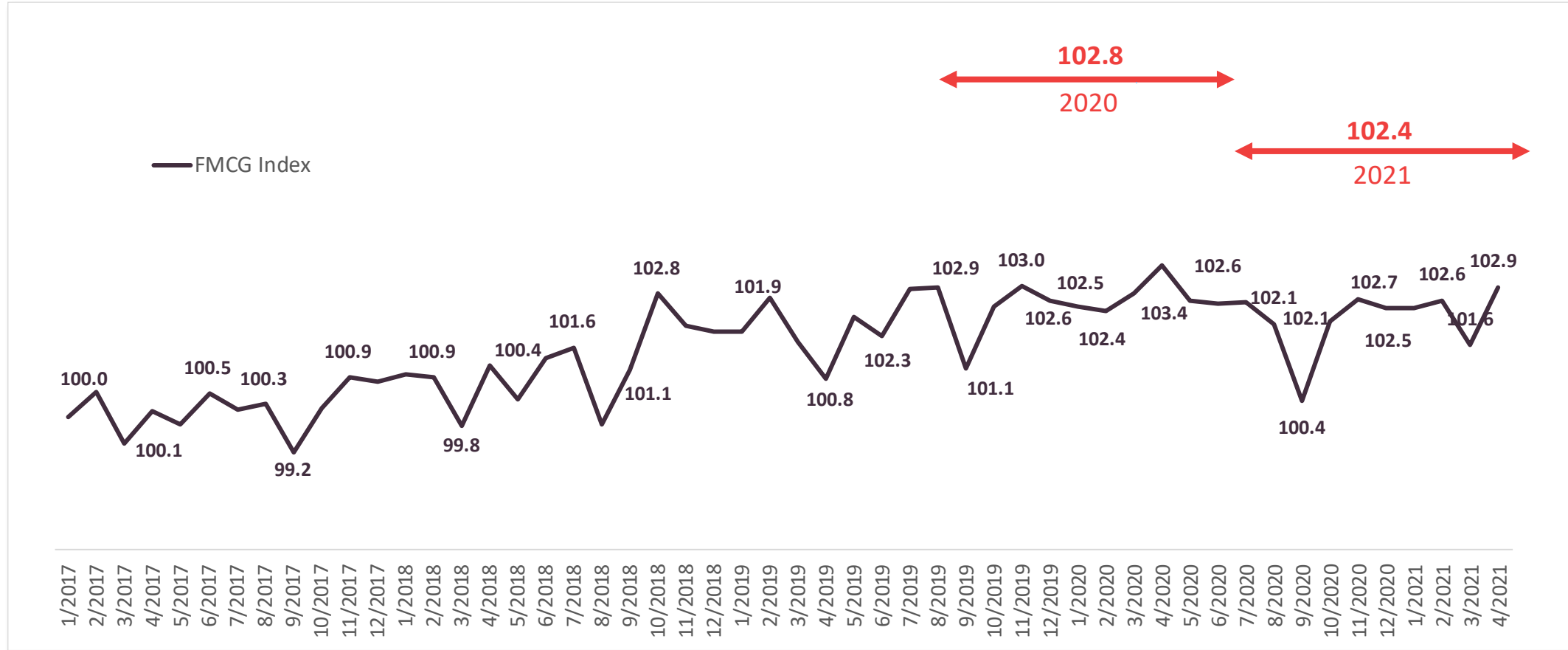


The StoreNext Price Index

StoreNext's Price Index presents a decrease of 0.4 points in current YTD compared to previous YTD



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

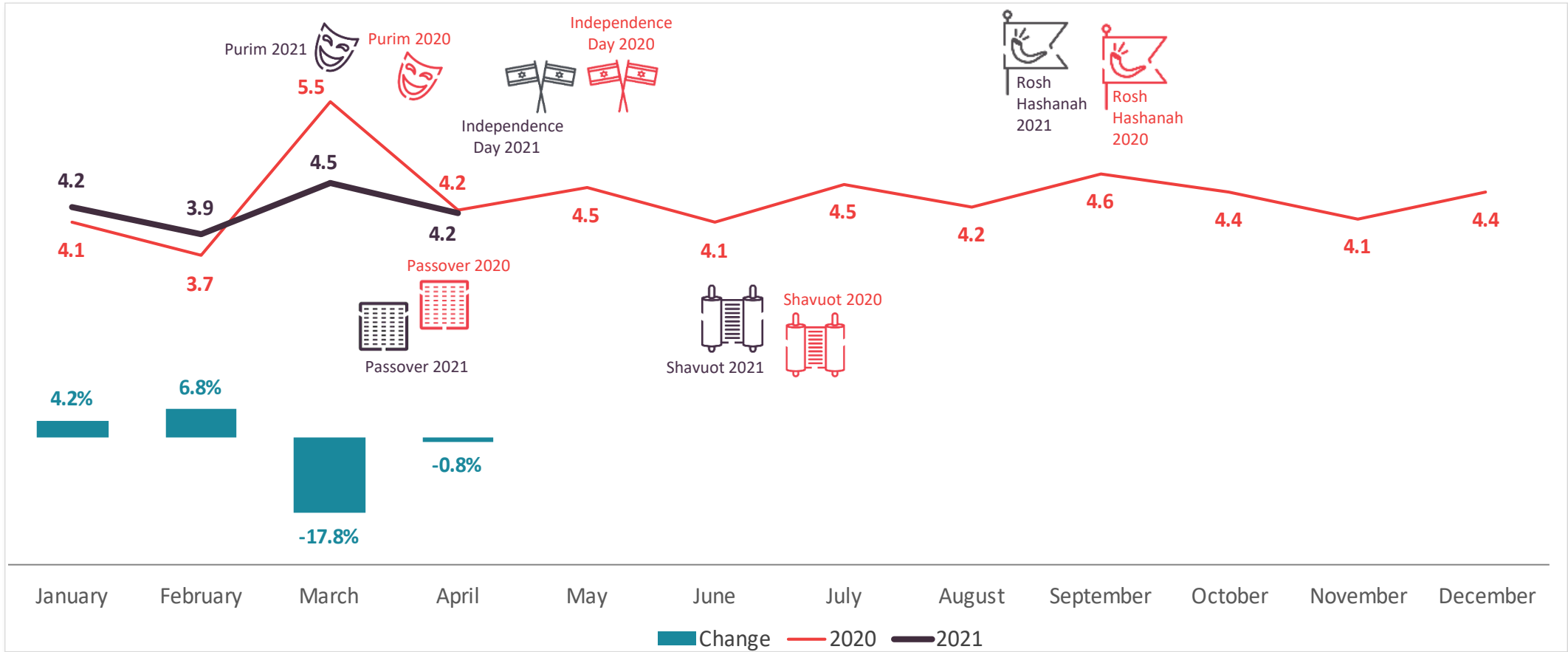


Monthly Sales Trend

April 2021 sales records a decrease of 0.8% compared to April 2020, and amounted to 4.2 Billion NIS, reduce of 35 Million NIS



* FMCG Value Sales, Billion NIS

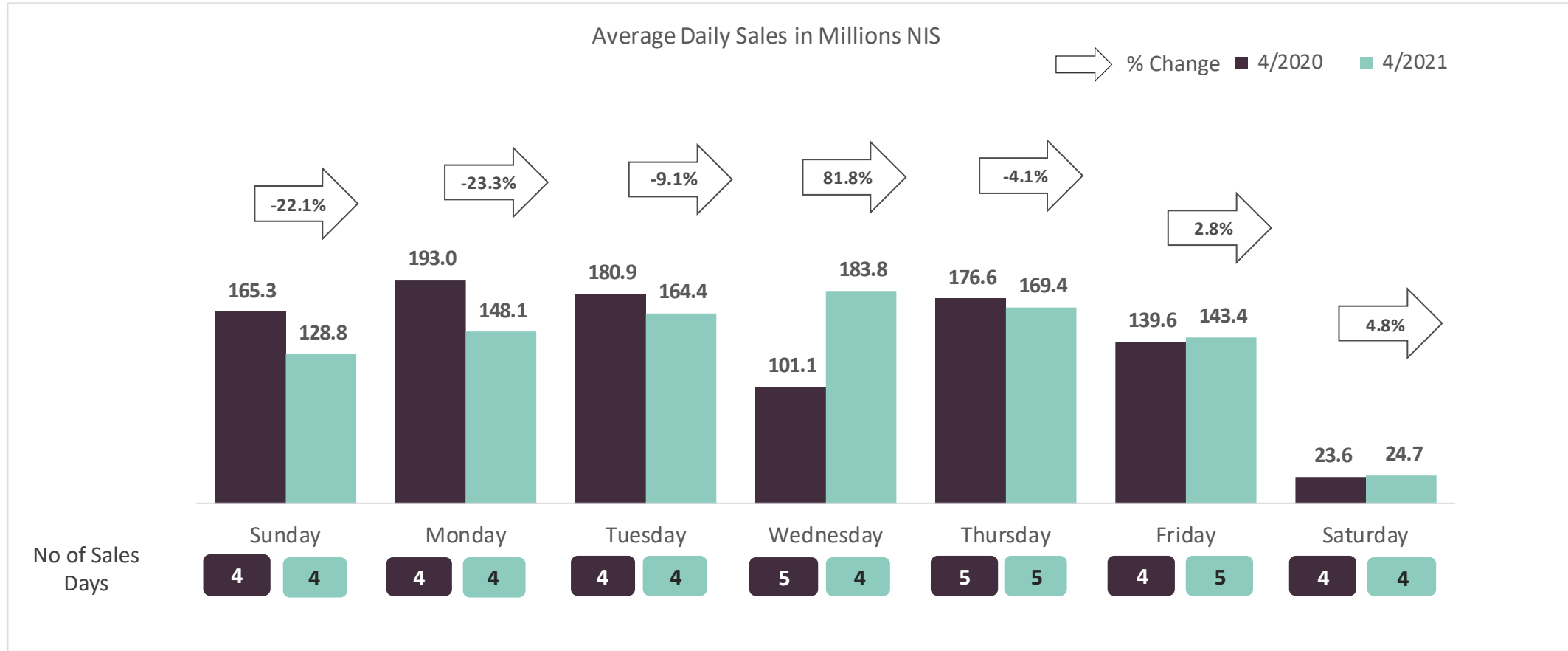


Sale By Days

- Monthly rate decline is halted due to change in sales days and stands at -0.8%
- Neutralizing change in sales days, April 2021 value change stands at 0.1%



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

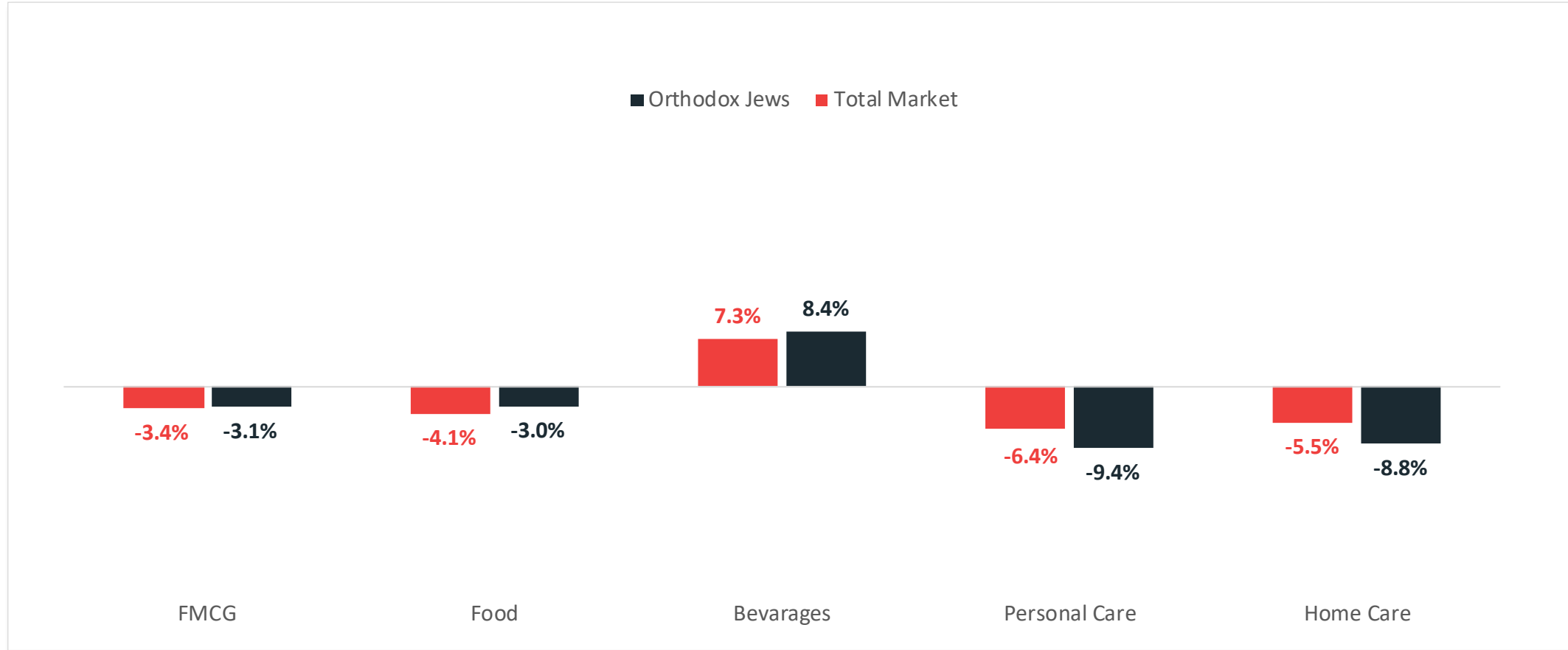


Orthodox Jews Sector Value Change Rate

- Orthodox Jews sector records radical declines in Personal Care and Home Care fields and a radical growths in Beverages compared to total market in current YTD
- The decreases in Food and in total FMCG market were lower than total market

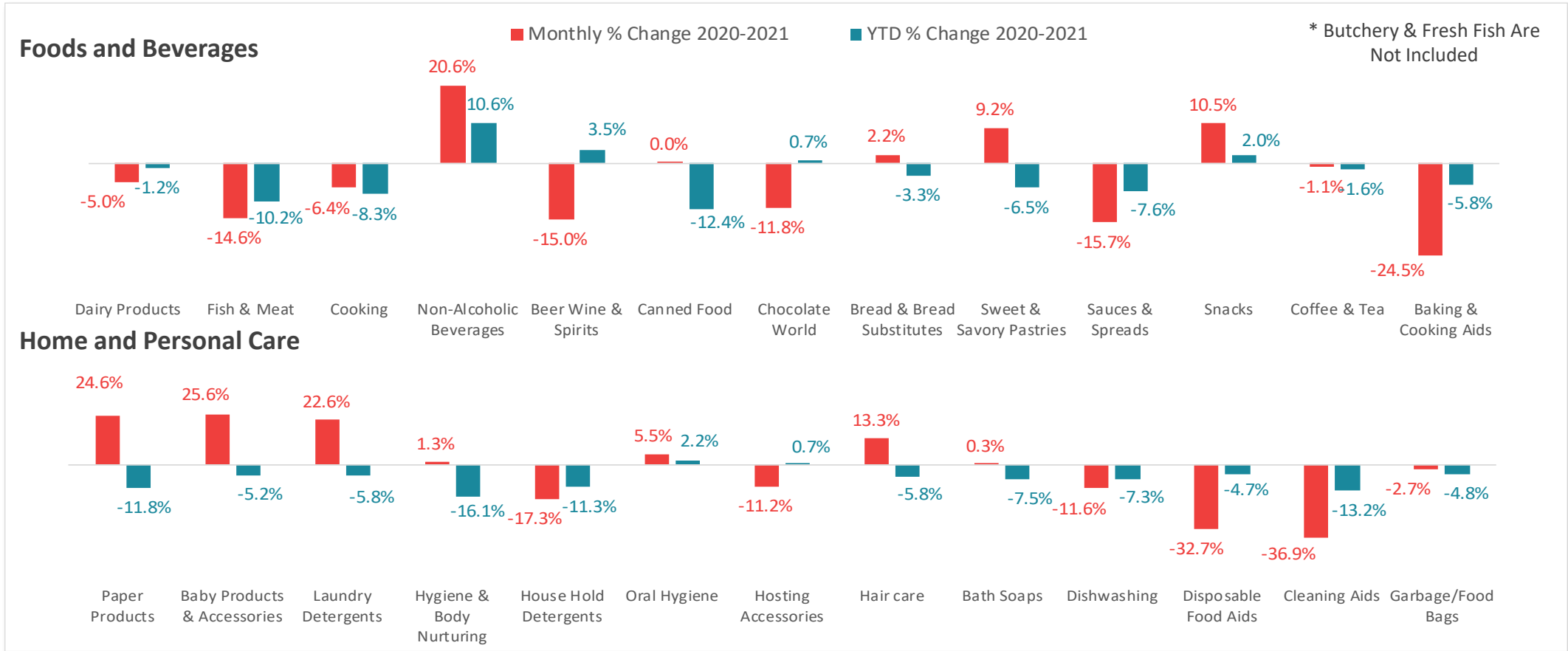


*Orthodox Jews– only stores with orthodox attributes, that are reflected in location, chain and basket composition, excluding Orthodox Jews population sales in General sector



Value Sales Change in Key Fields

- Following COVID-19 declining trend, Baking & Cooking Aids, alongside Sauces & Spreads and Beer Wine & Spirits worlds show a decrease in April 2021, compared to April 2020
- Cleaning world, Disposable Food Aids and Hosting Accessories are dropping

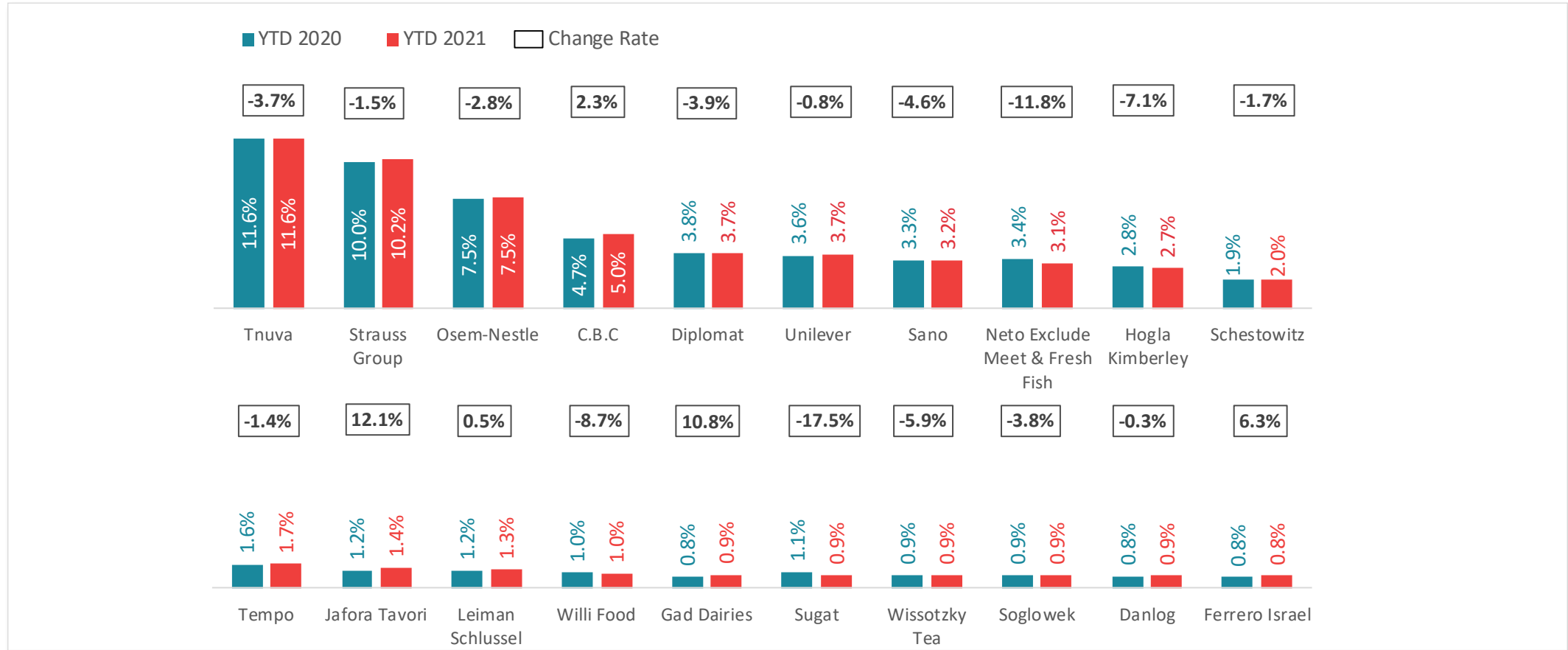


Market Share and Suppliers' Growth



- Top 20's SOM reaching 63.4% in current YTD, records a growth of 0.4 points compared to YTD 2020
- Top 10's SOM stands at 52.8% in current YTD and presents a increasing of 0.2 compared to previous period

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

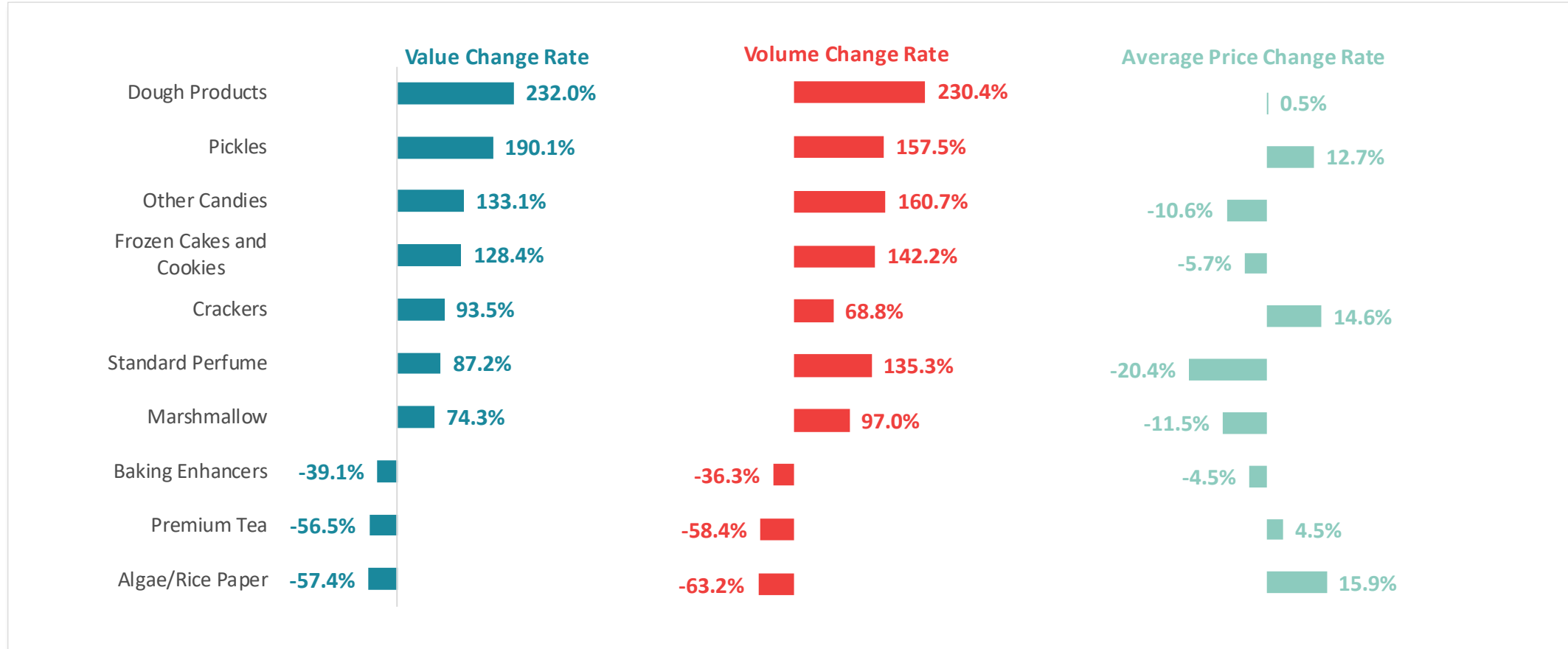


Rising / Descending Categories – Current Month TY vs LY

📈 Among rising categories- Dough Products, Pickles, Crackers and Marshmallow– following COVID-19 declining trend along with Passover and Lag B'Omer timing changes



📉 Among descending categories- Baking Enhancers and Algae/Rice Paper- consistent with both COVID-19 trends and other food trends

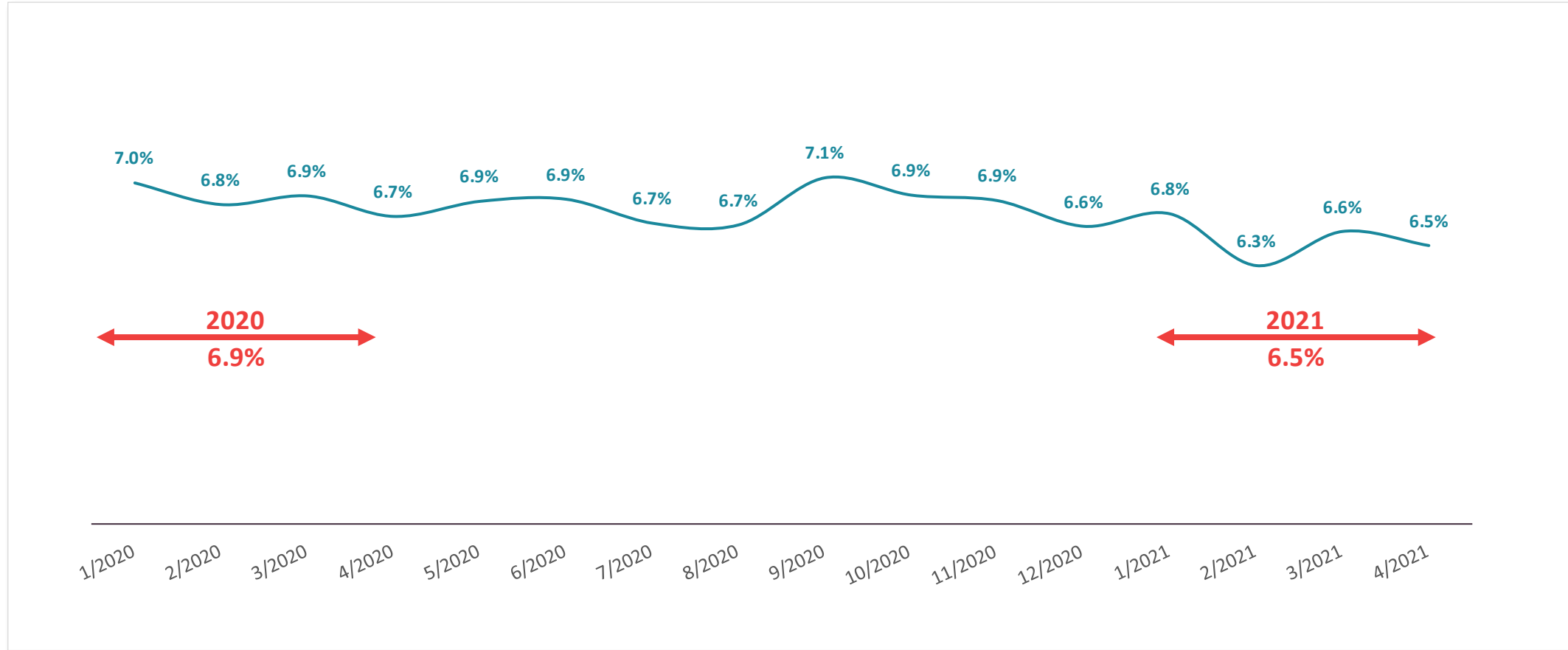


Private Label Market Share - FMCG Market

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)



A close-up photograph of a plate of food. The main focus is a meat patty on a bun, garnished with fresh green herbs. To the left are golden-brown french fries. In the foreground, there are several pieces of bread, some of which are topped with a sauce. The entire dish is served on a wooden cutting board. A teal-colored semi-transparent banner is overlaid across the middle of the image, containing the text "Independence Day 2021" in white, bold, sans-serif font.

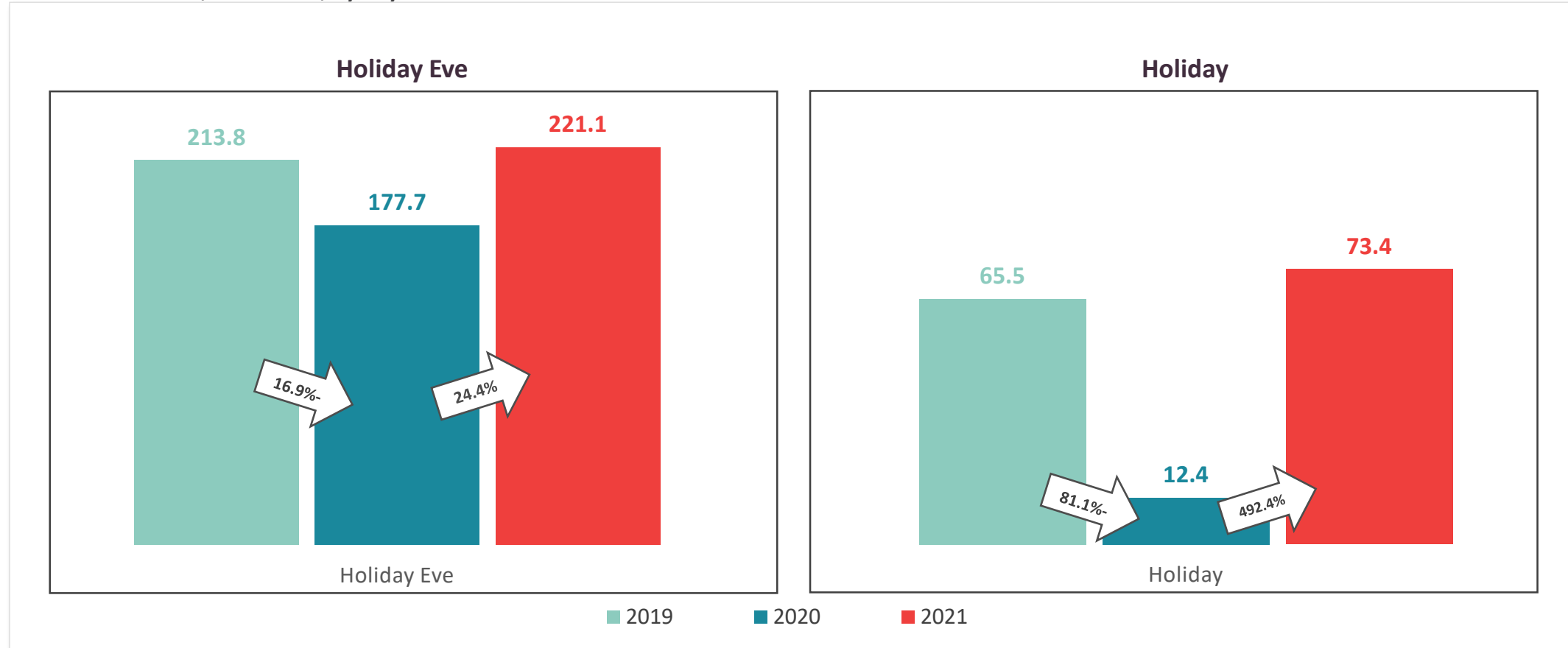
Independence Day 2021

Independence Day Sales- Daily Comparison

- As part of the COVID-19 effects, in both Holiday Evening and Holiday itself record a significant growth in 2021, compared 2020
- this trend is even intensifying due to the fact that in 2021 Holiday Evening was in Wednesday, which is considered as a significant sales day, while in 2020 Holiday Evening was in Tuesday



* FMCG Value Sales, Million NIS, By Days



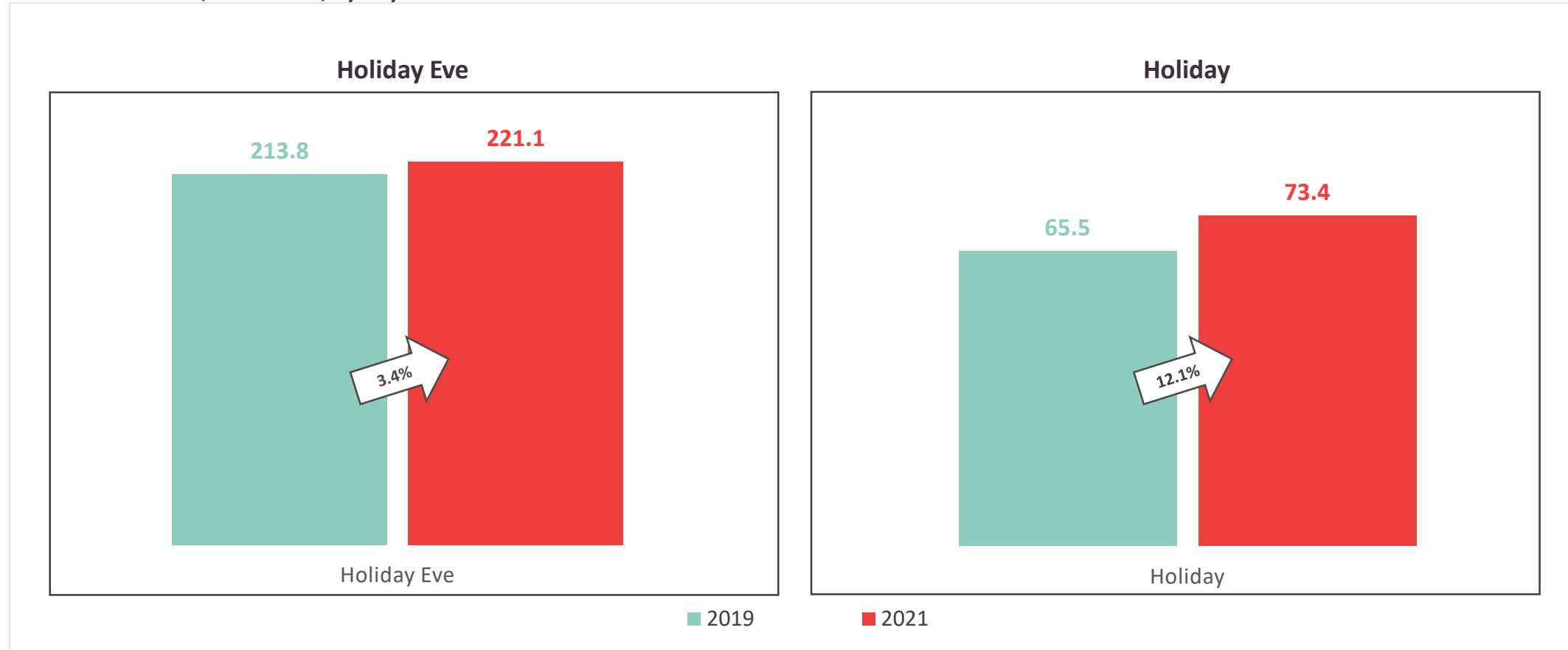
Independence Day Sales- Daily Comparison

Between 2021 and 2019 (excluded COVID-19 year) the growth is more moderate, especially in Holiday Evening, which is similar to population growth



This comparison is neutralized sales days gaps, because in both years Holiday and Holiday Evening were in same days

* FMCG Value Sales, Million NIS, By Days

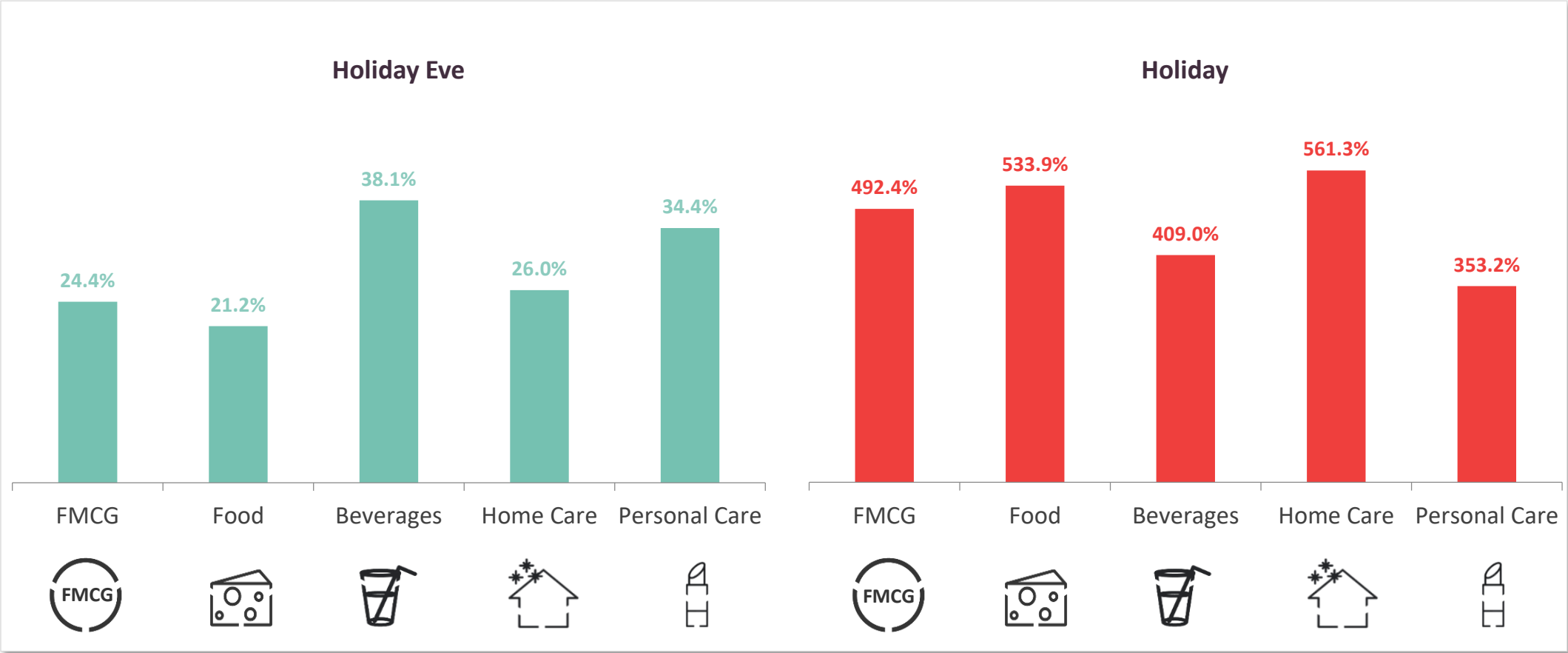


Independence Day Value Change By Fields- 2021 vs 2020

- 🏠 All fields show significant growths between 2021 and 2021, which is much noticable in the Holiday
- 🏠 The most increasing field in Holiday Evening is Beverages and in Holiday Home care was the most growing one



* Independence Day 2021 vs Independence Day 2020, By Days



Holiday Categories



Independence Day Categories

BBQ Equipment

Disposable

Beer Wine & Spirits

Meat & Chicken

Pita Bread

Pickles

Packed & Deli Salads

Beverages

Marshmallow

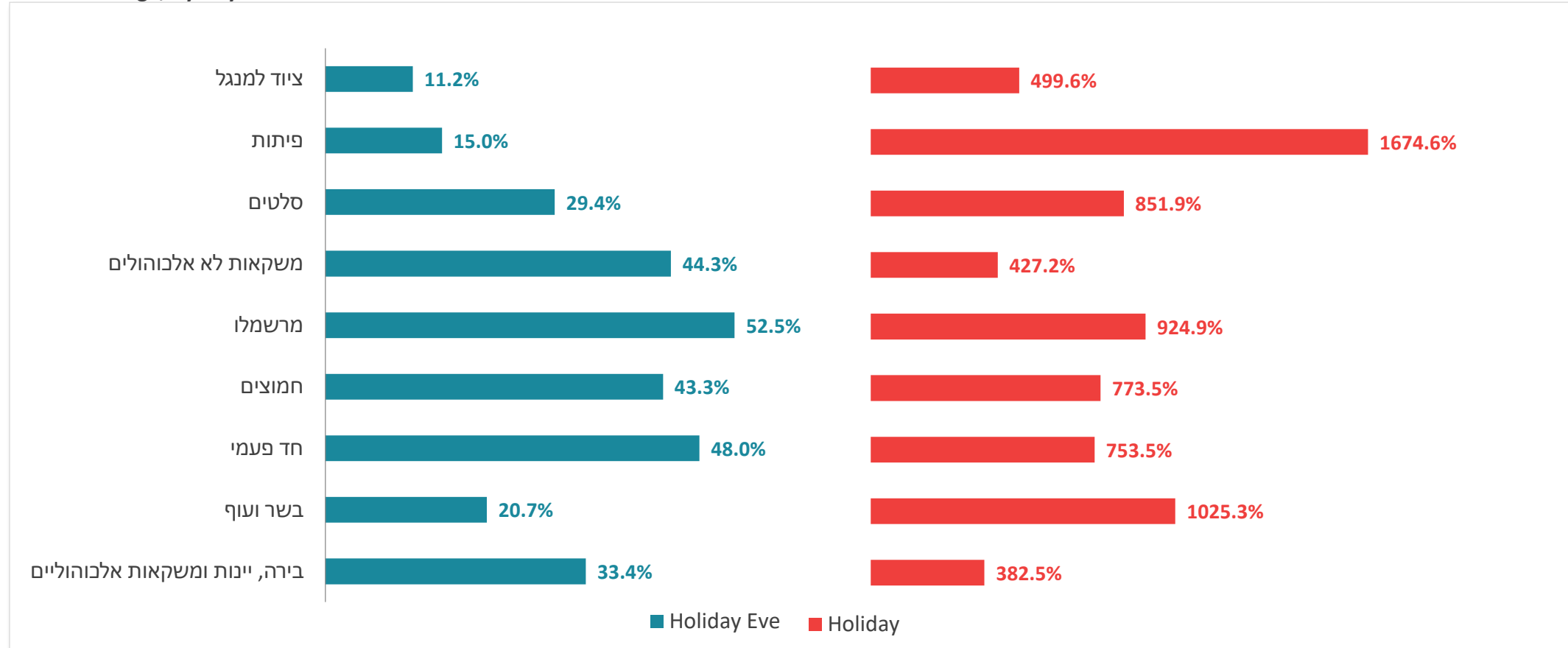


Holiday Categories' Change By Years- Daily Comparison

🏠 All Holiday Categories grow in 2021, when in Holiday Evening Marshmallow and Disposable are the most rising and in the Holiday Pita Bread and Meat & Chicken are the most increasing – maybe due to their short expiry



* Value Change, By Days



!Thank You



StoreNext

Looking Forward