



# June 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 2.9% value sales in current YTD compared to previous YTD
- ❏ In June 2021, FMCG value sales grow by 1.9% and when neutralizing change in sales days, change stands at 0.9%



- ❏ StoreNext's Price Index presents a decrease of 0.1 points in current YTD compared previous YTD
- ❏ All fields show a Price Index decline, exclude Food, while Personal Care field marks the most significant one



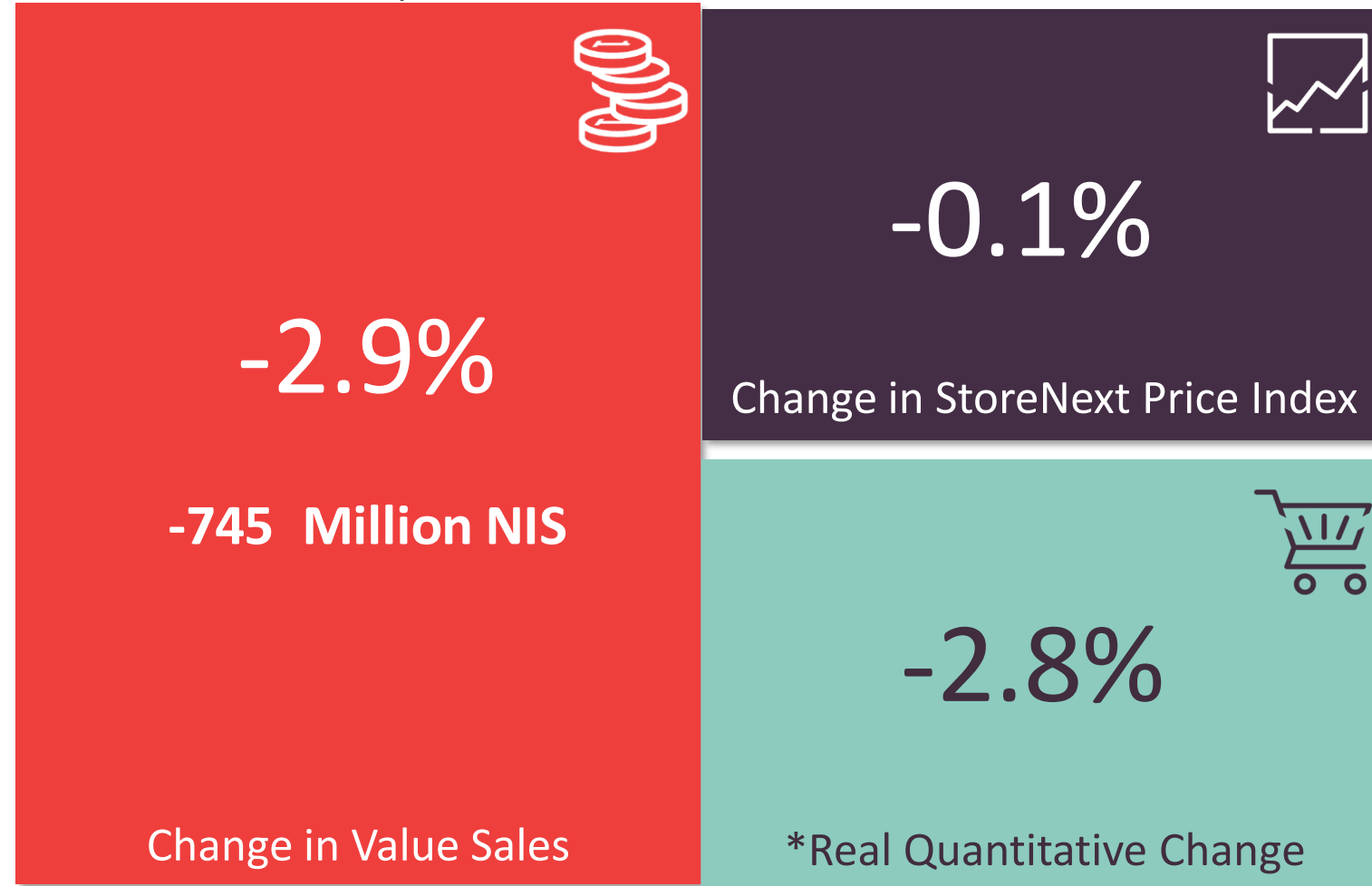
- ❏ Baking & Cooking Aids shows decline while Snacks, Non-Alcoholic Beverages and Chocolate World mark an increase in June 2021, compared to June 2020
- ❏ Cleaning world and Baby Products & Accessories are rising while House Hold Detergents and Disposable Food Aids are dropping



# Change in Sales and Price Indices



FMCG, YTD 2021 compared to YTD 2020



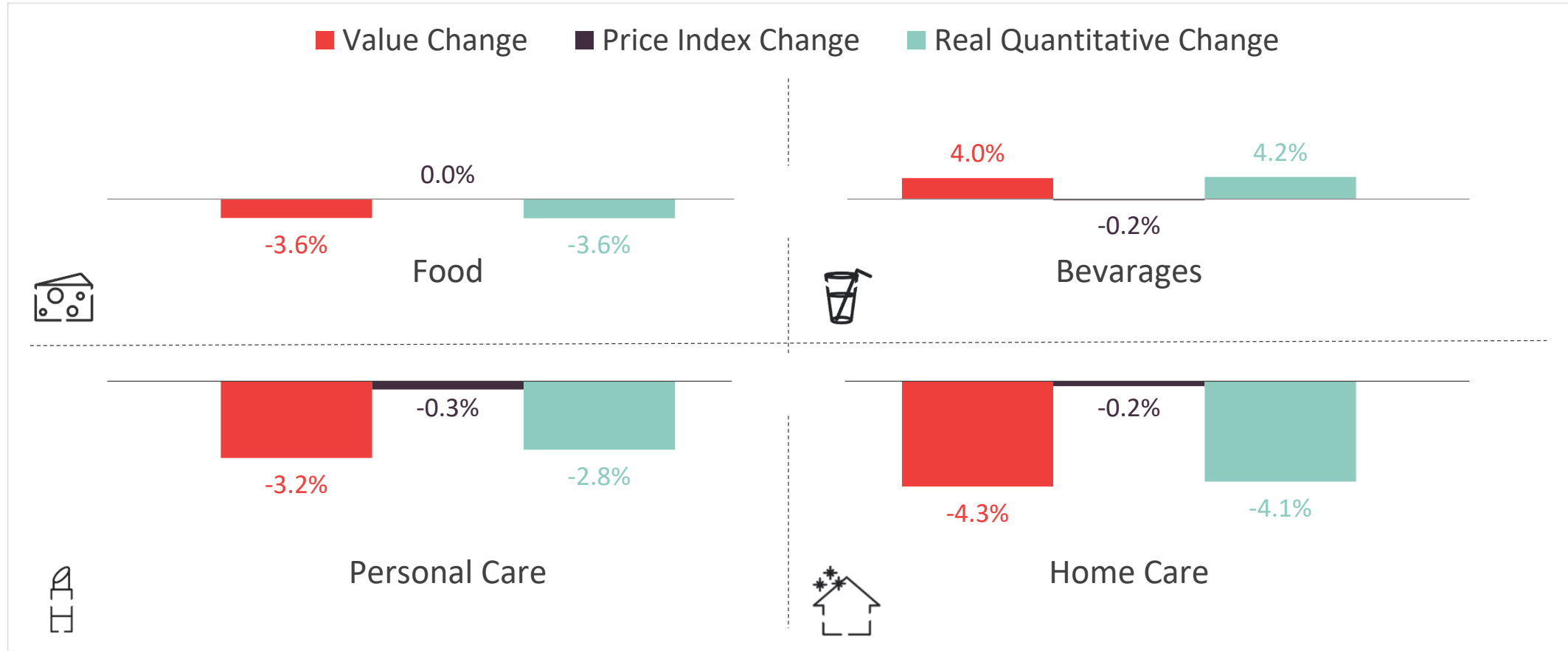
\* Real Quantitative Change – Value sales growth deducting StoreNext Price Index changes (neutralized of mix effects)

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

- Except of Beverages, all fields record real decline while Home Care shows the most significant one
- All fields show a Price Index decline, excluding Food which shows stagnation



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

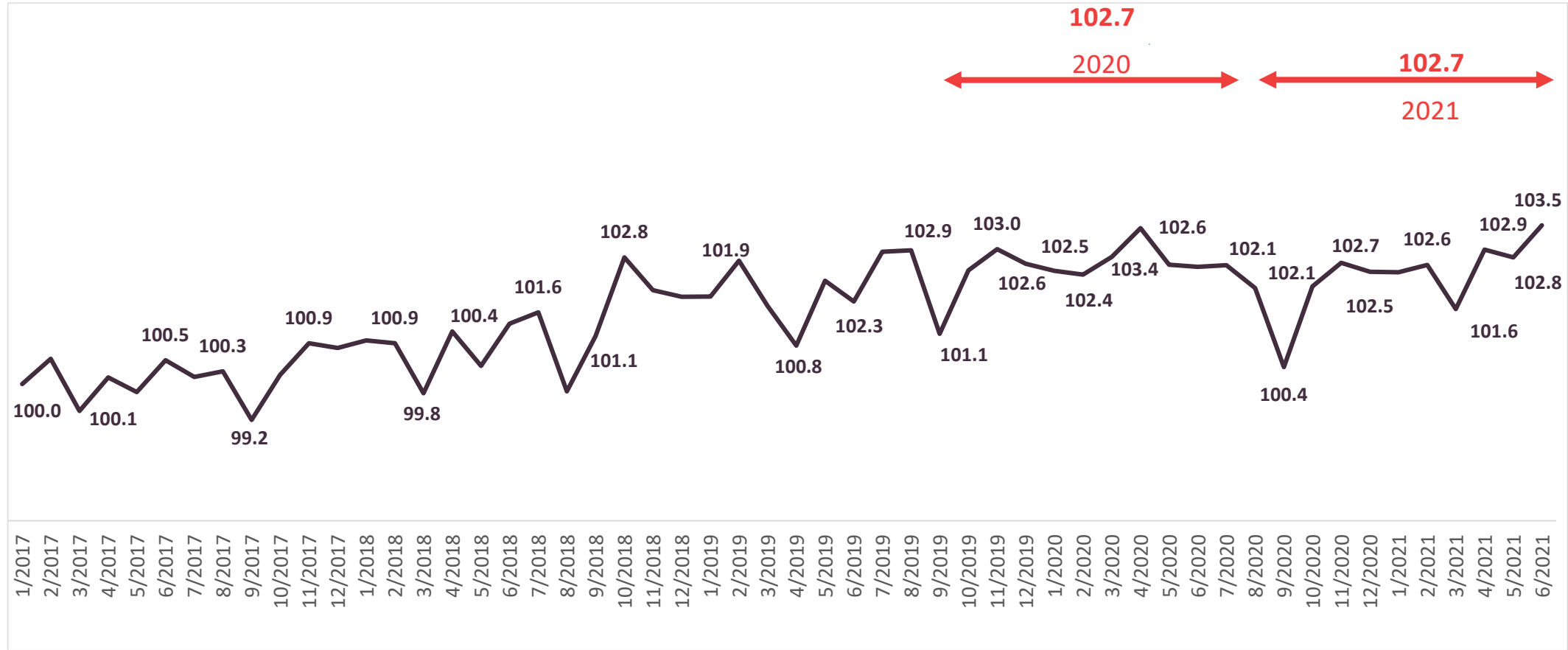


# The StoreNext Price Index

- StoreNext's Price Index presents a slight decrease of 0.1 points in current YTD compared to previous YTD
- In June 2021 StoreNext's Price Index reaches 103.5 – the highest index since January 2017 – which is the calculation basis



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

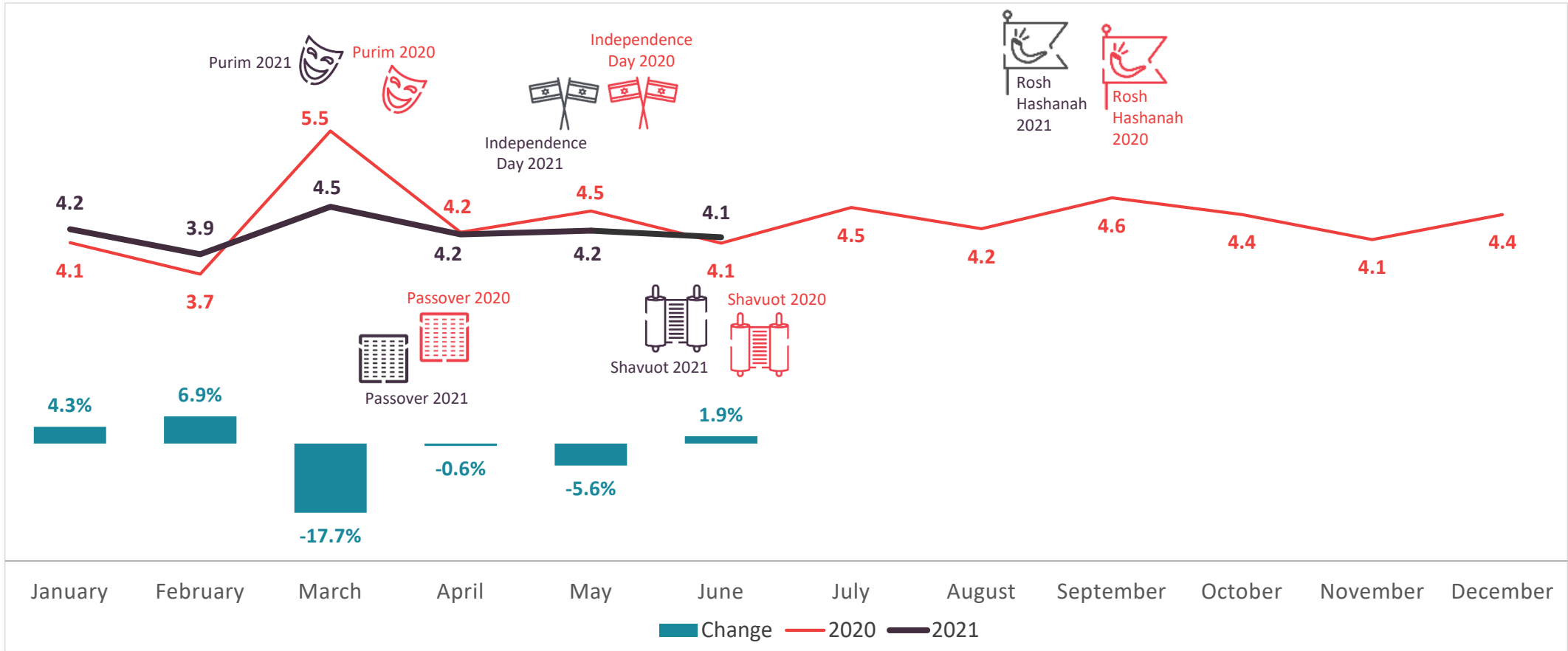


# Monthly Sales Trend

June 2021 sales records a increase of 1.9% compared to June 2020, and amounted to 4.1 Billion NIS, growth of 77 Million NIS



\* FMCG Value Sales, Billion NIS

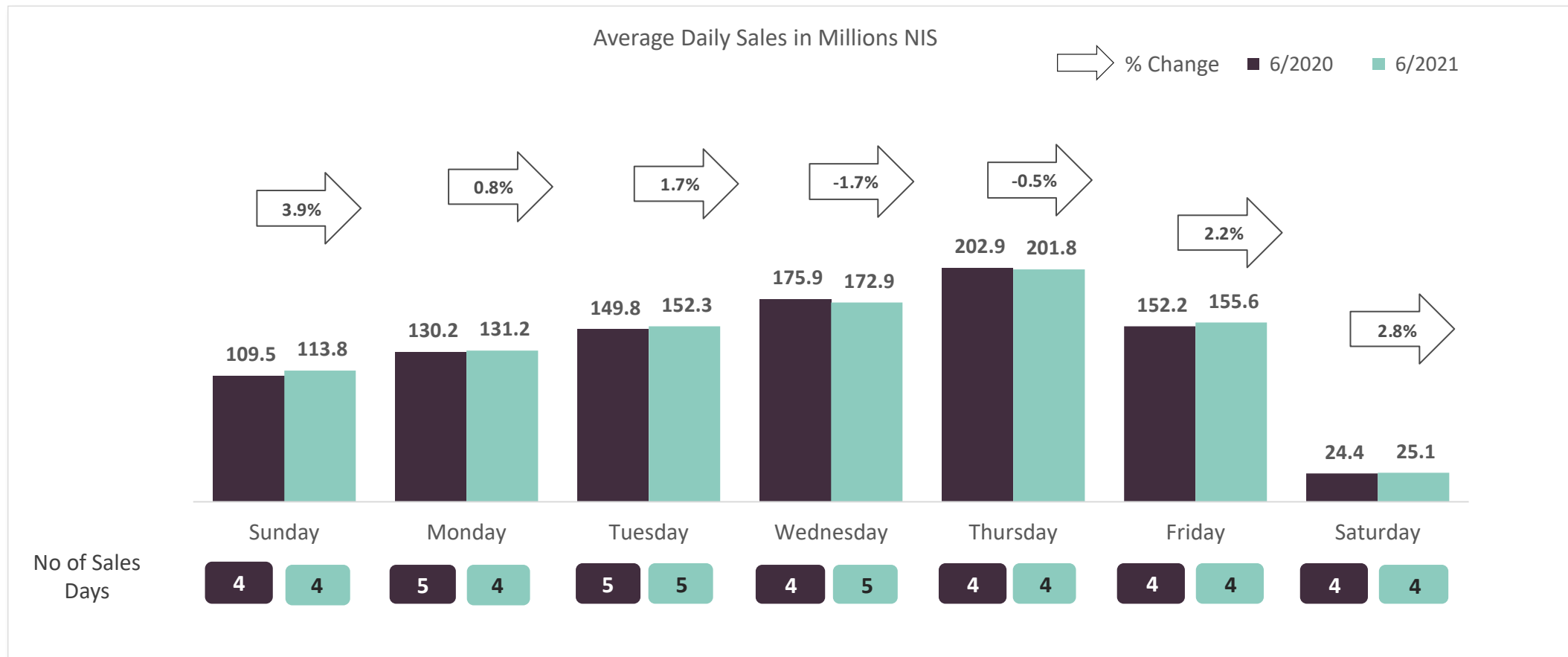


# Sale By Days

- Monthly rate decline is affected due to change in sales days and stands at 1.9%
- Neutralizing change in sales days, June 2021 value change stands at 0.9%



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



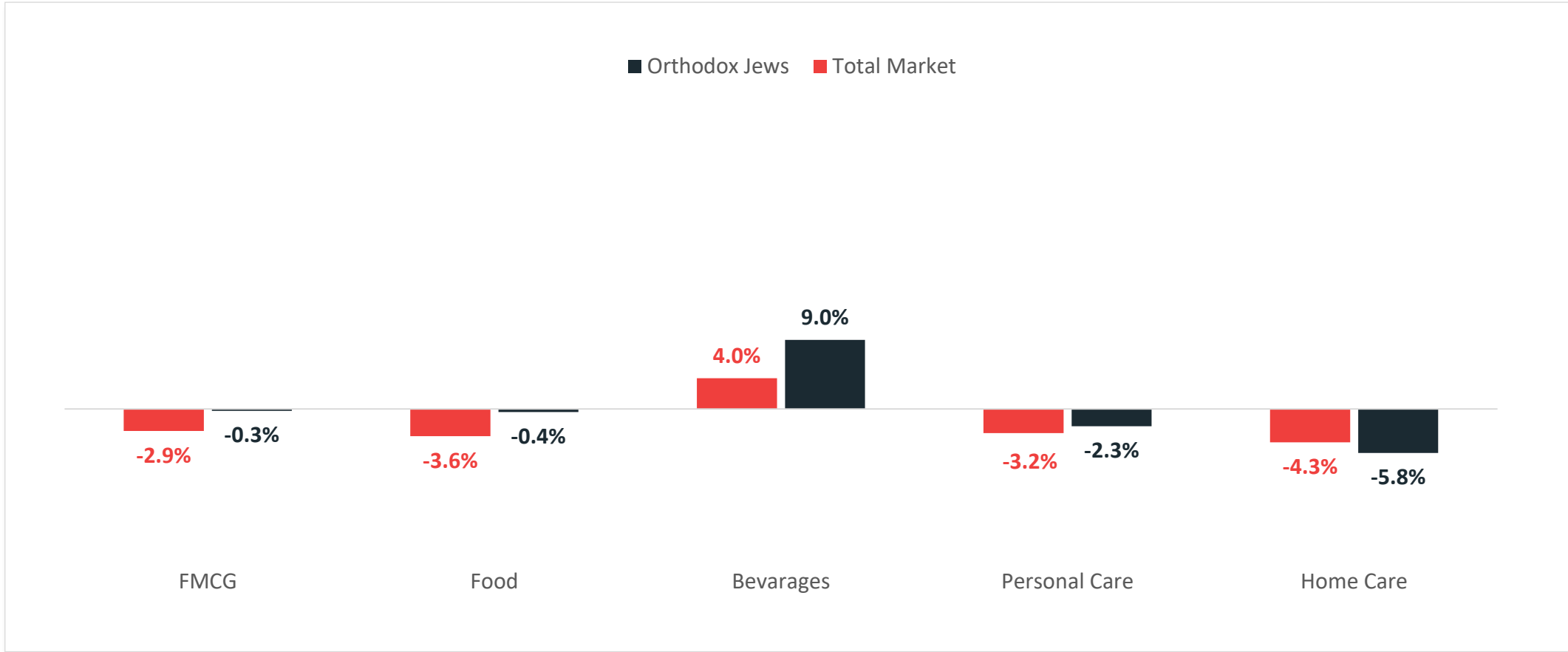


# Orthodox Jews Sector Value Change Rate

- Orthodox Jews sector records significant decline in Home Care and significant growth Beverages fields compared to total market in current YTD
- While declines in Food, Personal Care and in total FMCG market were lower

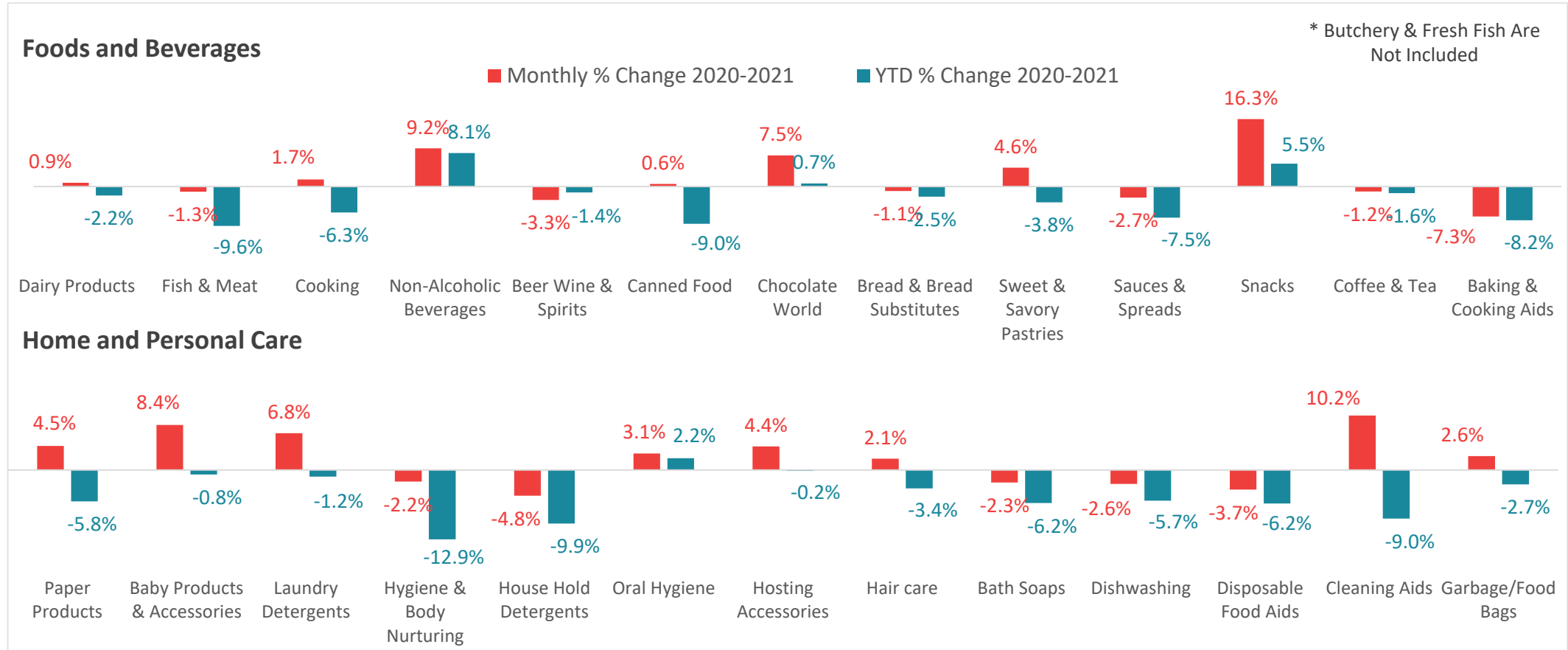


\*Orthodox Jews— only stores with orthodox attributes, that are reflected in location, chain and basket composition, excluding Orthodox Jews population sales in General sector



# Value Sales Change in Key Fields

- Baking & Cooking Aids shows decline while Snacks, Non-Alcoholic Beverages and Chocolate World mark an increase in June 2021, compared to June 2020
- Cleaning world and Baby Products & Accessories are rising while House Hold Detergents and Disposable Food Aids are dropping

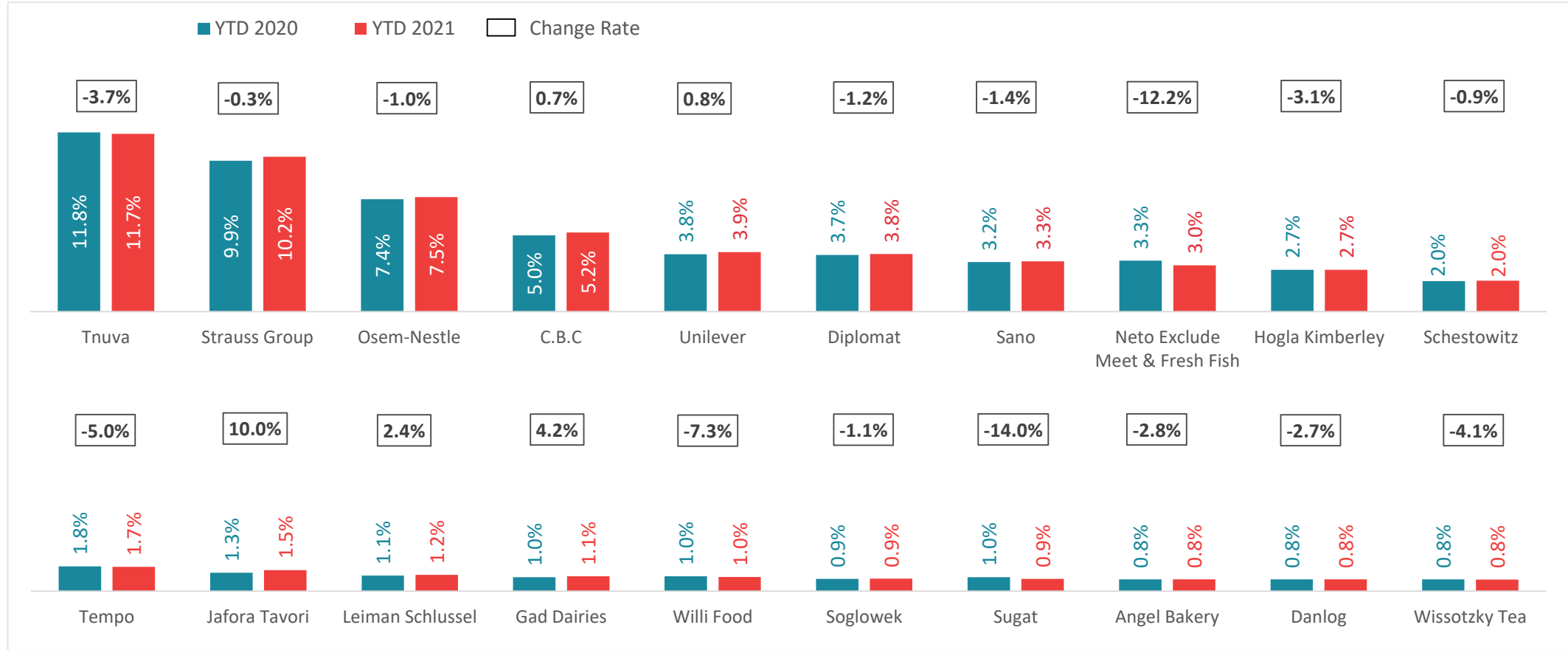


# Market Share and Suppliers' Growth



- Top 20's SOM reaching 64.0% in current YTD, records a growth of 0.6 points compared to YTD 2020
- Top 10's SOM stands at 53.3% in current YTD and presents a increasing of 0.5 compared to previous period

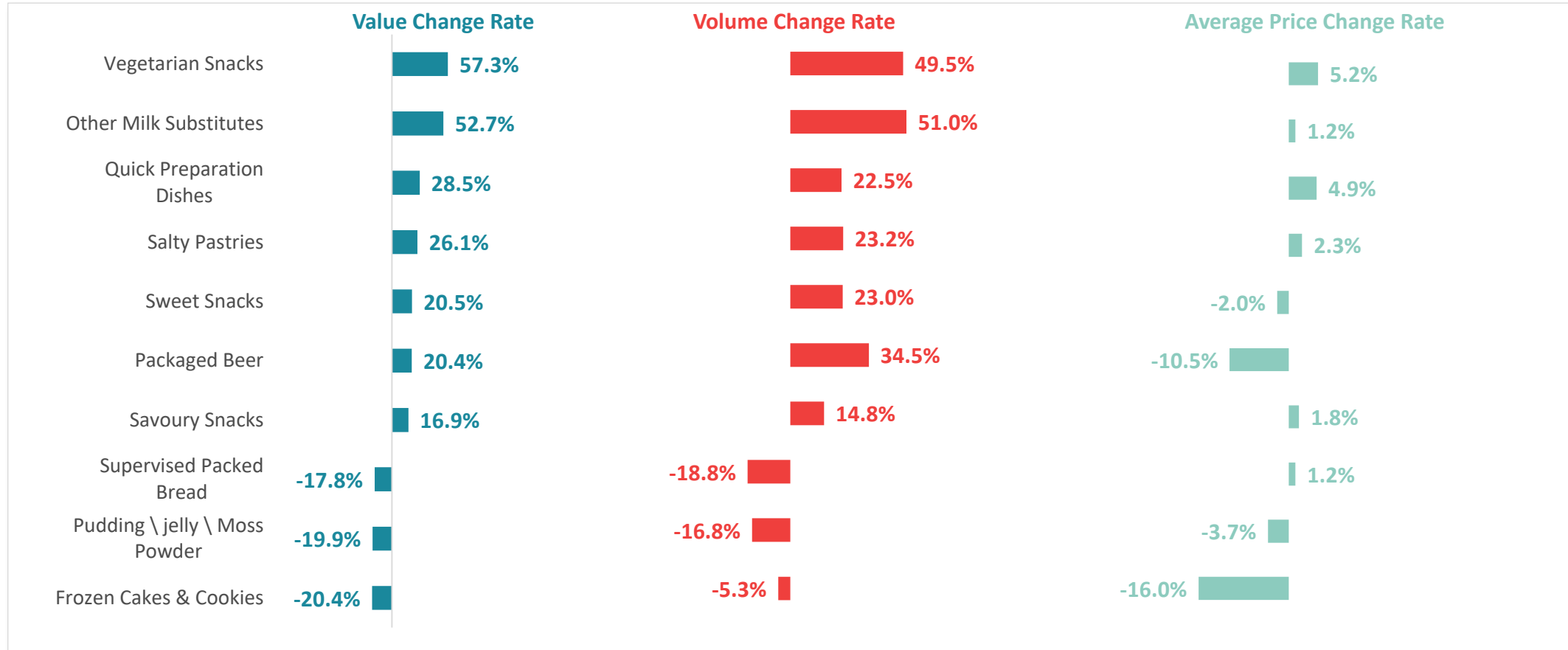
\* Value Shares (FMCG Market- Excluding Butchers, Bakery, Fruits and Vegetables and Cigarette data)



# Rising / Descending Categories – Current Month TY vs LY

📈 Among rising categories- Sweet Snacks, Packaged Beer and Savoury Snacks– Probably due to Euro 2020 games occurred this June. Along with, Vegetarian Snacks and Other Milk Substitutes and Quick Preparation Dishes

Among descending categories- Supervised Packed Bread, Pudding \ jelly \ Moss Powder and Frozen Cakes & Cookies

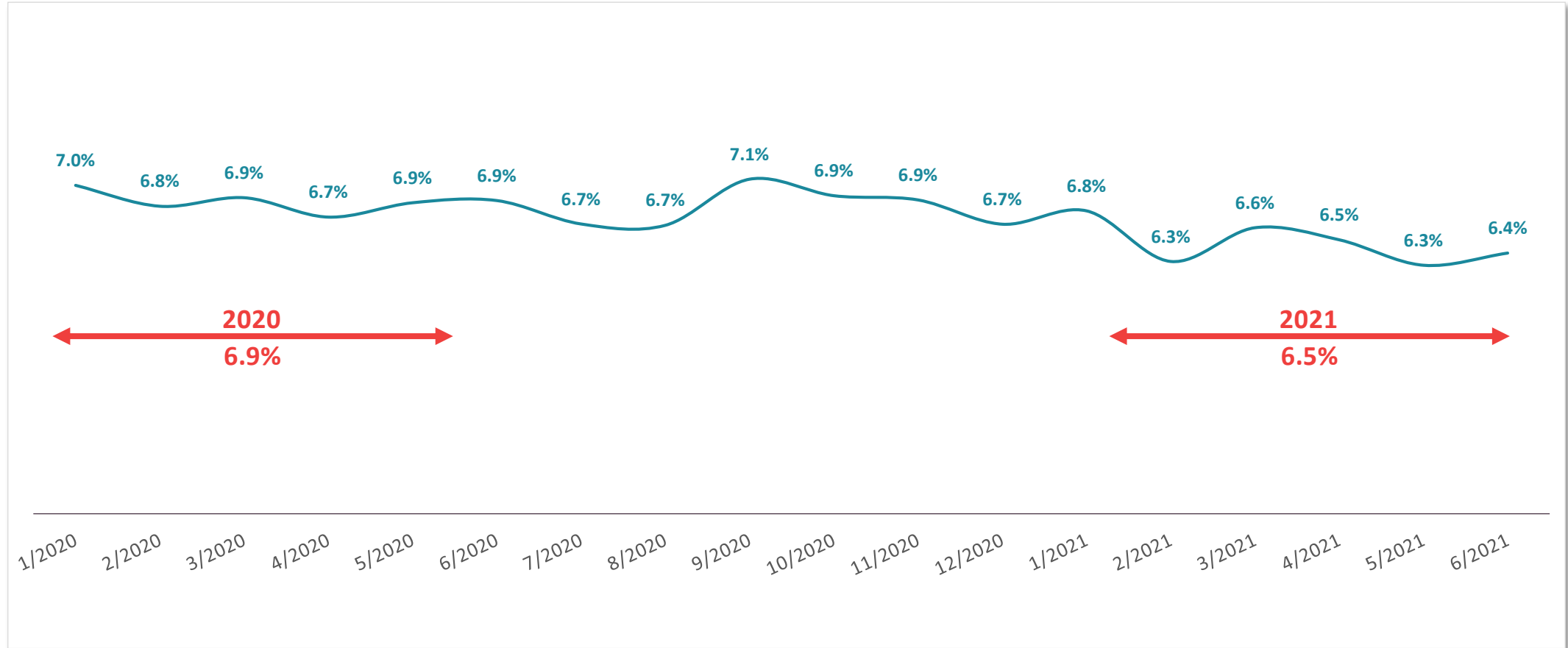


# Private Label Market Share - FMCG Market

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