



August 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 2.1% value sales in current YTD compared to previous YTD
- 🏠 In August 2021, FMCG value sales grow by 5.9% and when neutralizing change in sales days, change stands at 2.5%



- 🏠 StoreNext's Price Index presents a slight increase of 0.2 points in current YTD compared to previous YTD
- 🏠 StoreNext's Price Index shows mixed trend – a slight increases in Food, Personal Care and Home Care and a decrease in Beverages

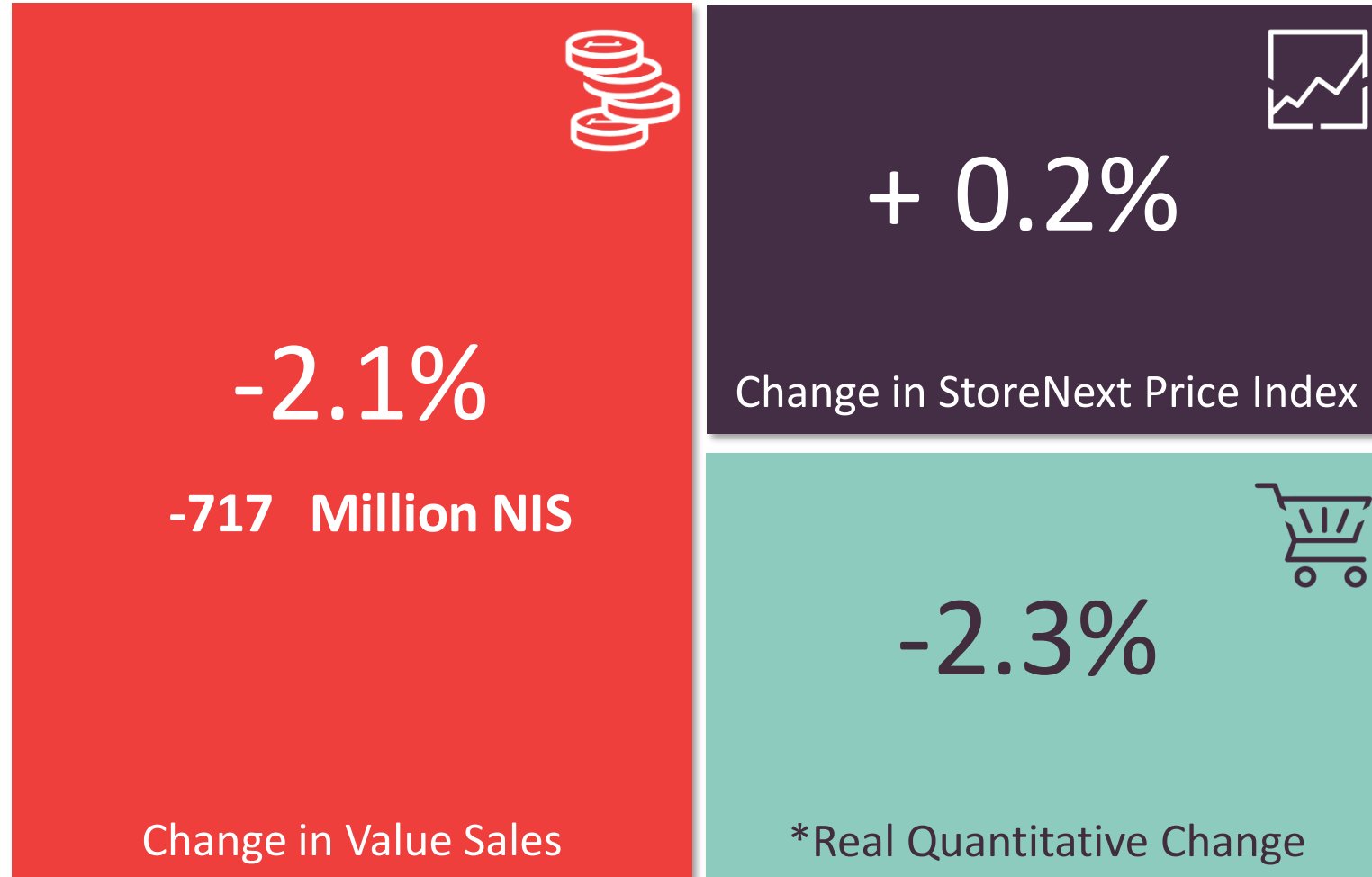


- 🏠 All Food and Beverages key fields shows an increase compared to August 2020, while the most significant one recorded in Fish & Meat, Cooking and Chocolate World
- 🏠 All Home Care and Personal Care key fields grow as well, exclude Hygiene & Body Nurturing. Paper Products, Baby Products & Accessories and Hosting Accessories are the most increasing fields



Change in Sales and Price Indices

FMCG, YTD 2021 compared to YTD 2020



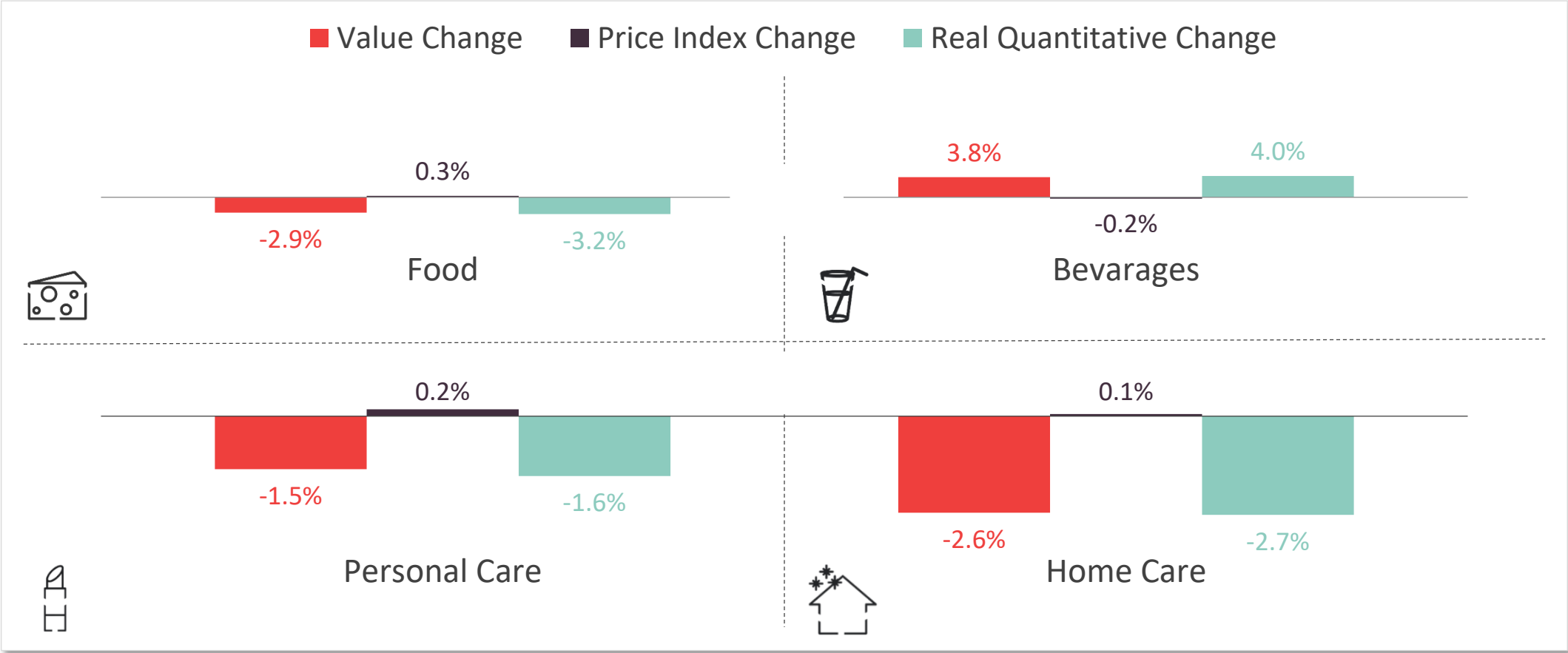
* Real Quantitative Change – Value sales growth deducting StoreNext Price Index changes (neutralized of mix effects)

FMCG YTD Change Rate By Fields (2020 VS 2021)

- Except of Beverages, all fields record real decline while Food shows the most significant one
- StoreNext's Price Index shows mixed trend – a slight increases in Food, Personal Care and Home Care and a decrease in Beverages



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

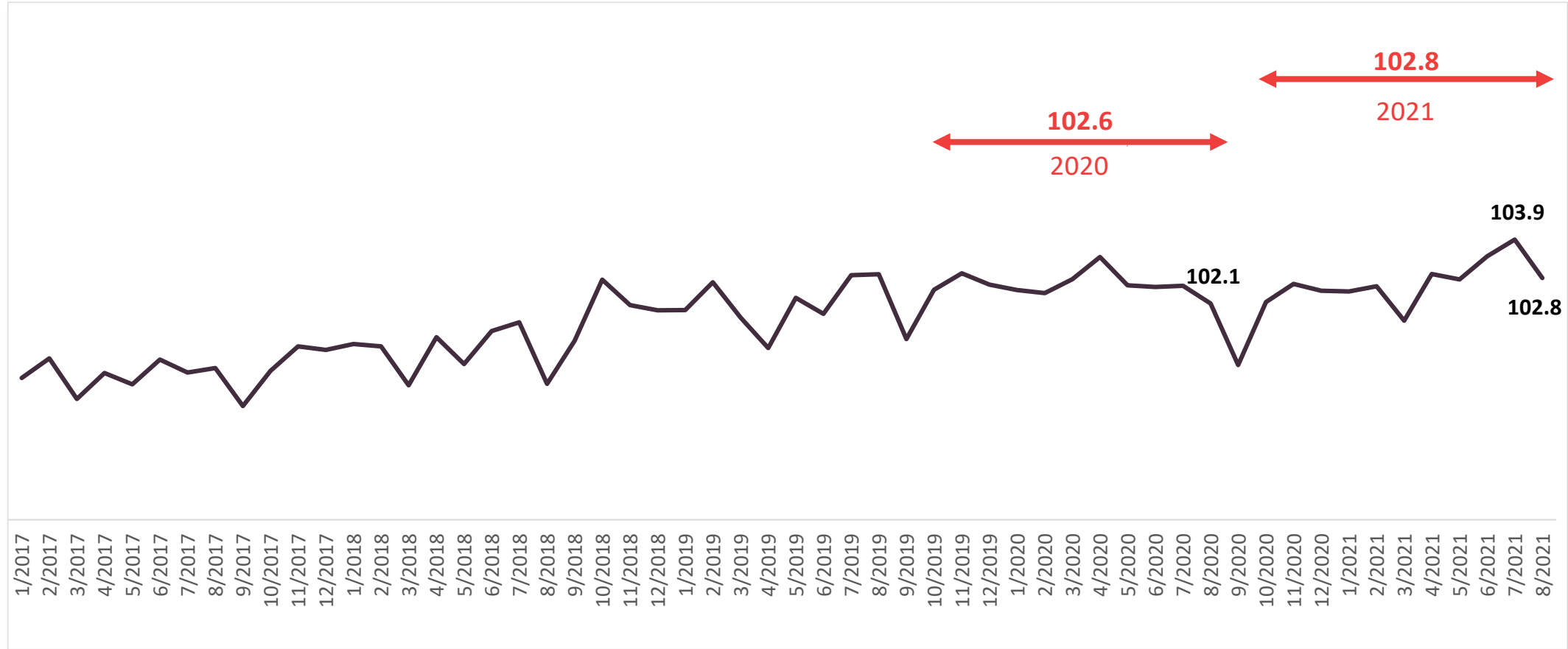


The StoreNext Price Index

- StoreNext's Price Index presents a slight increase of 0.2 points in current YTD compared to previous YTD
- In August 2021 StoreNext's Price Index reaches 102.8 – a decline compared to July and a growth compared to August 2020



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

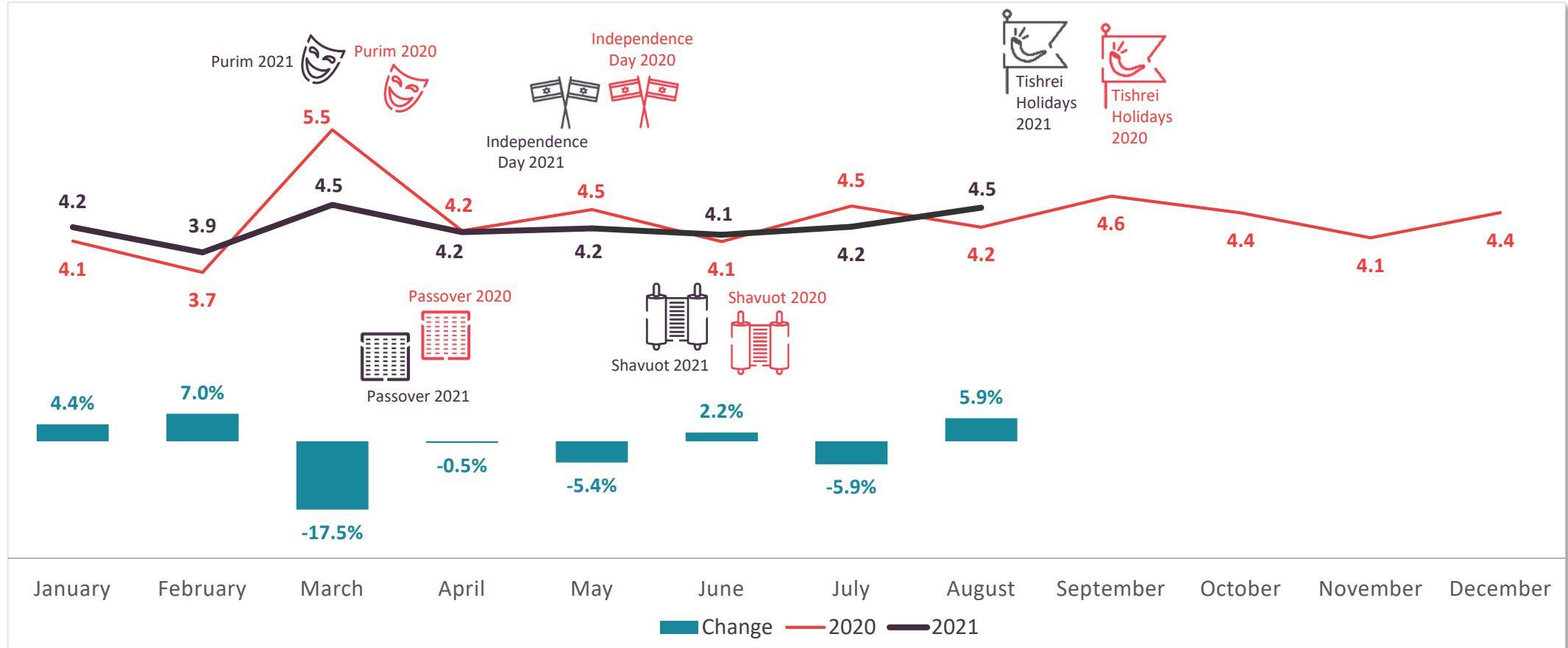


Monthly Sales Trend

August 2021 sales records an increase of 5.9% compared to August 2020, and amounted to 4.5 Billion NIS, growth of 250.2 Million NIS



* FMCG Value Sales, Billion NIS

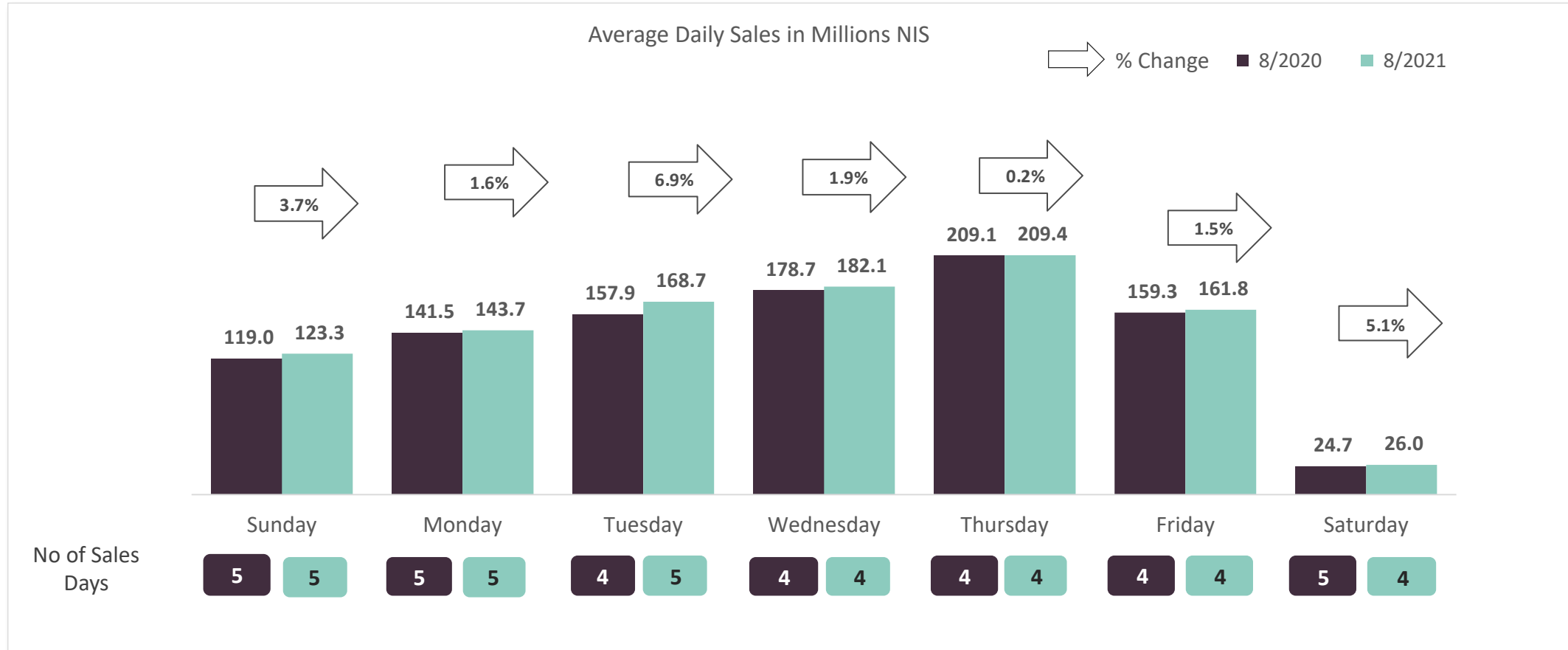


Sale By Days

- Monthly rate decline is affected due to change in sales days and stands at 5.9%
- Neutralizing change in sales days, August 2021 value change stands at 2.5%



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

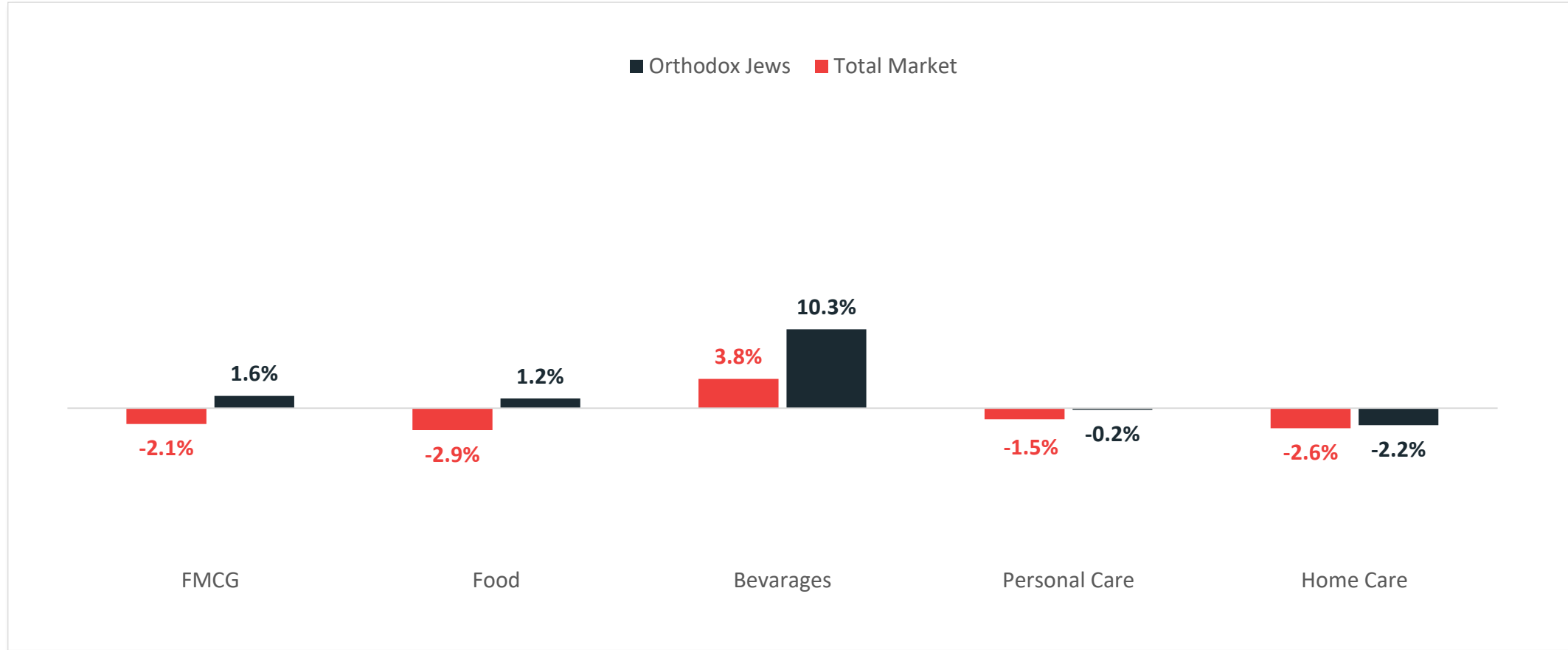


Orthodox Jews Sector Value Change Rate

- Orthodox Jews sector records opposite trend In comparison to total market – an increase of 1.6%
- The trend is presented in Food field as well, while in Beverages the Orthodox Jews sector records a much significant change

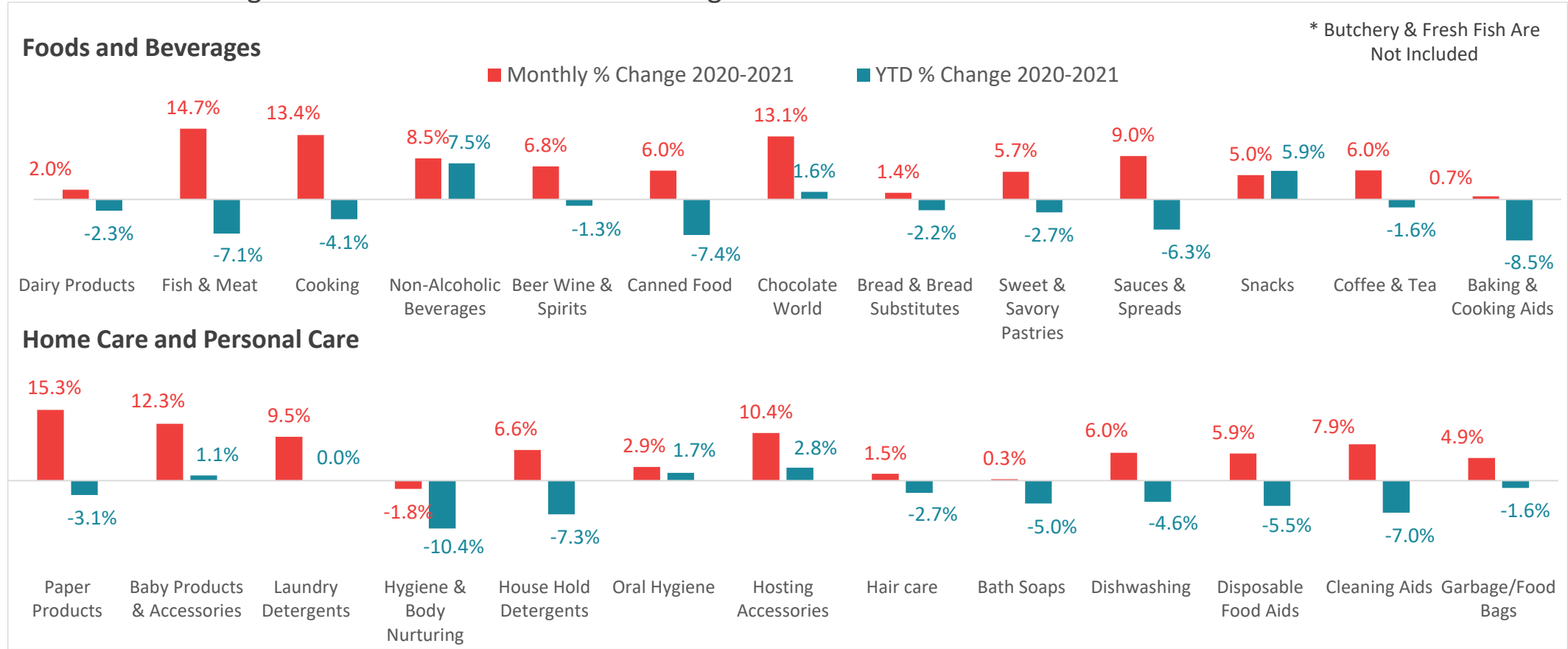


*Orthodox Jews– only stores with orthodox attributes, that are reflected in location, chain and basket composition, excluding Orthodox Jews population sales in General sector



Value Sales Change in Key Fields

- 🏠 All Food and Beverages key fields shows an increase compared to August 2020, while the most significant one recorded in Fish & Meat, Cooking and Chocolate World
- 🏠 All Home Care and Personal Care key fields grow as well, exclude Hygiene & Body Nurturing. Paper Products, Baby Products & Accessories and Hosting Accessories are the most increasing fields



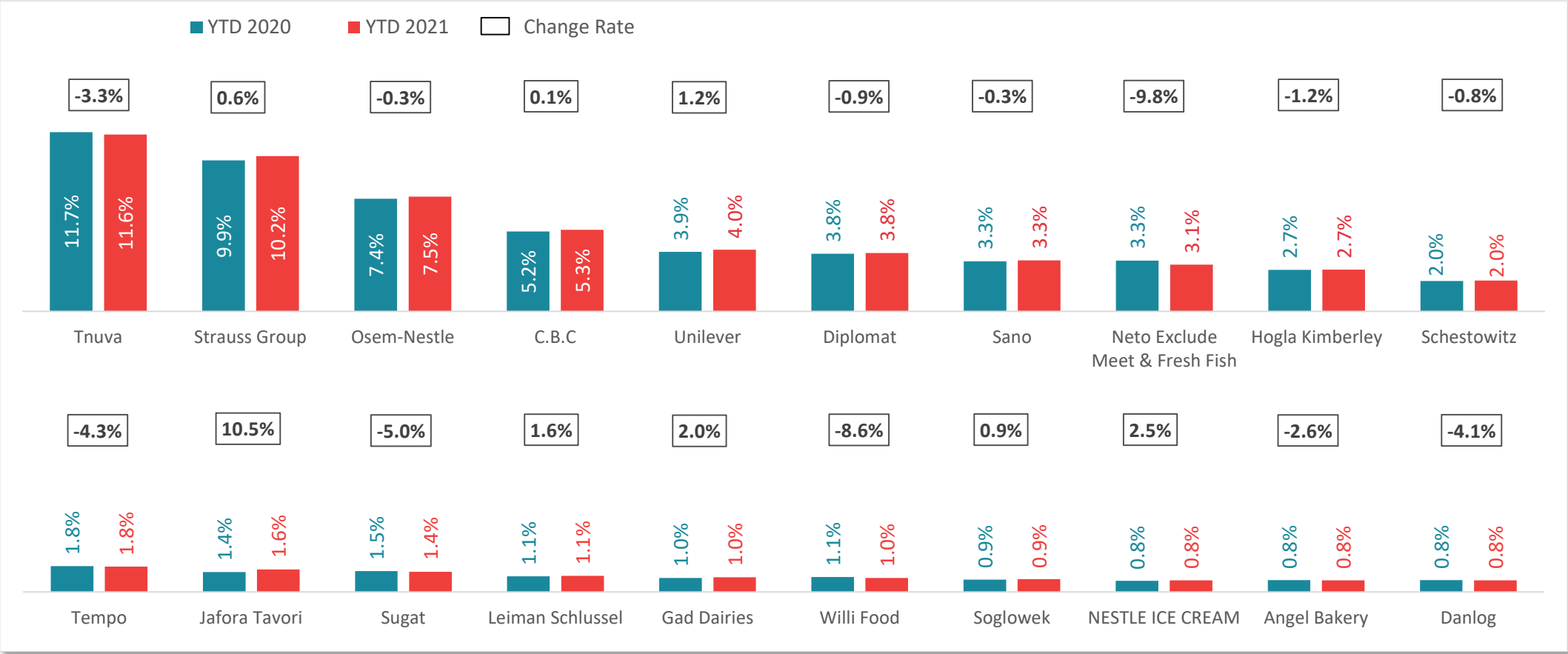
Market Share and Suppliers' Growth

🏠 Top 20's SOM reaching 64.8% in current YTD, records a growth of 0.5 points compared to YTD 2020

🏠 Top 10's SOM stands at 53.5% in current YTD and presents a increasing of 0.4 compared to previous period



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

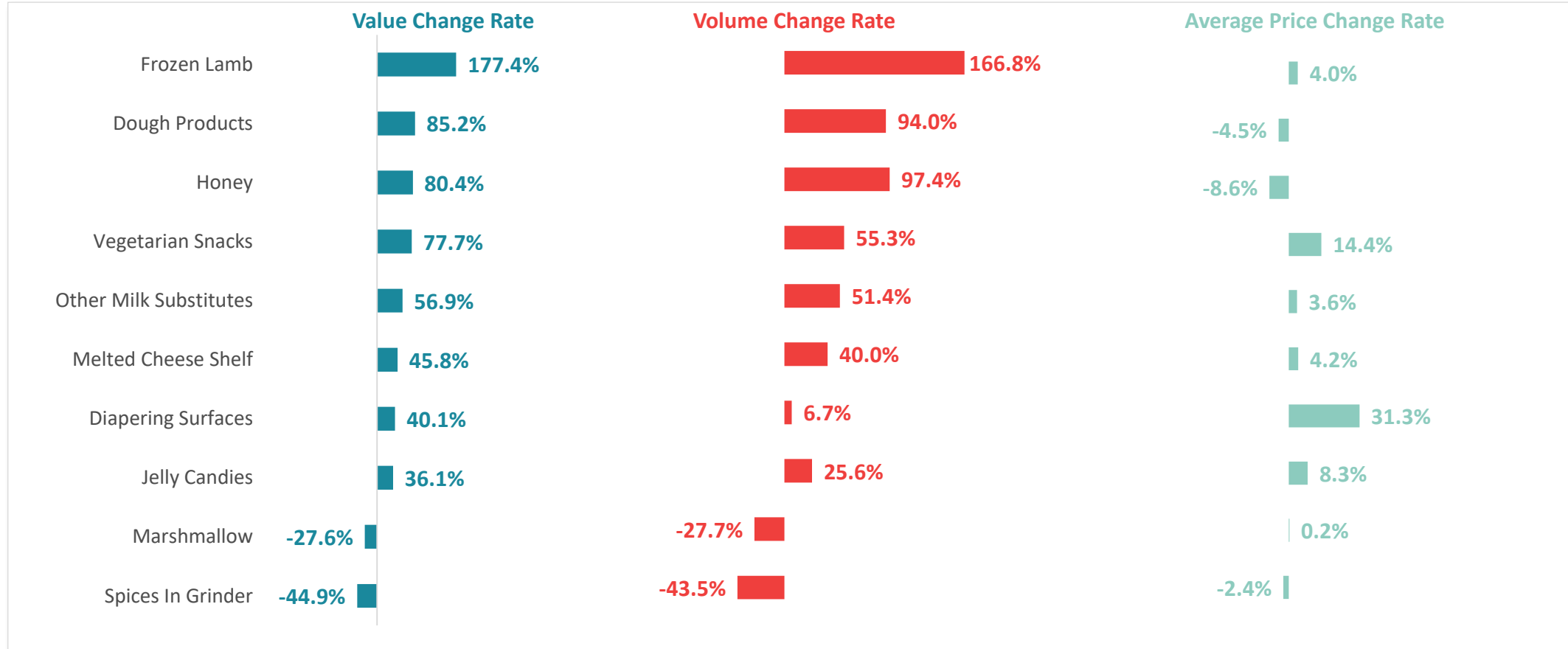


Rising / Descending Categories – Current Month TY vs LY

📦 Among rising categories- Frozen Lamb, Dough Products, Honey and Vegetarian Snacks. Probably because of the affects of Tishrei Holidays and staying at home due to school break under Corona limitations



Among descending categories- Spices In Grinder and Marshmallow

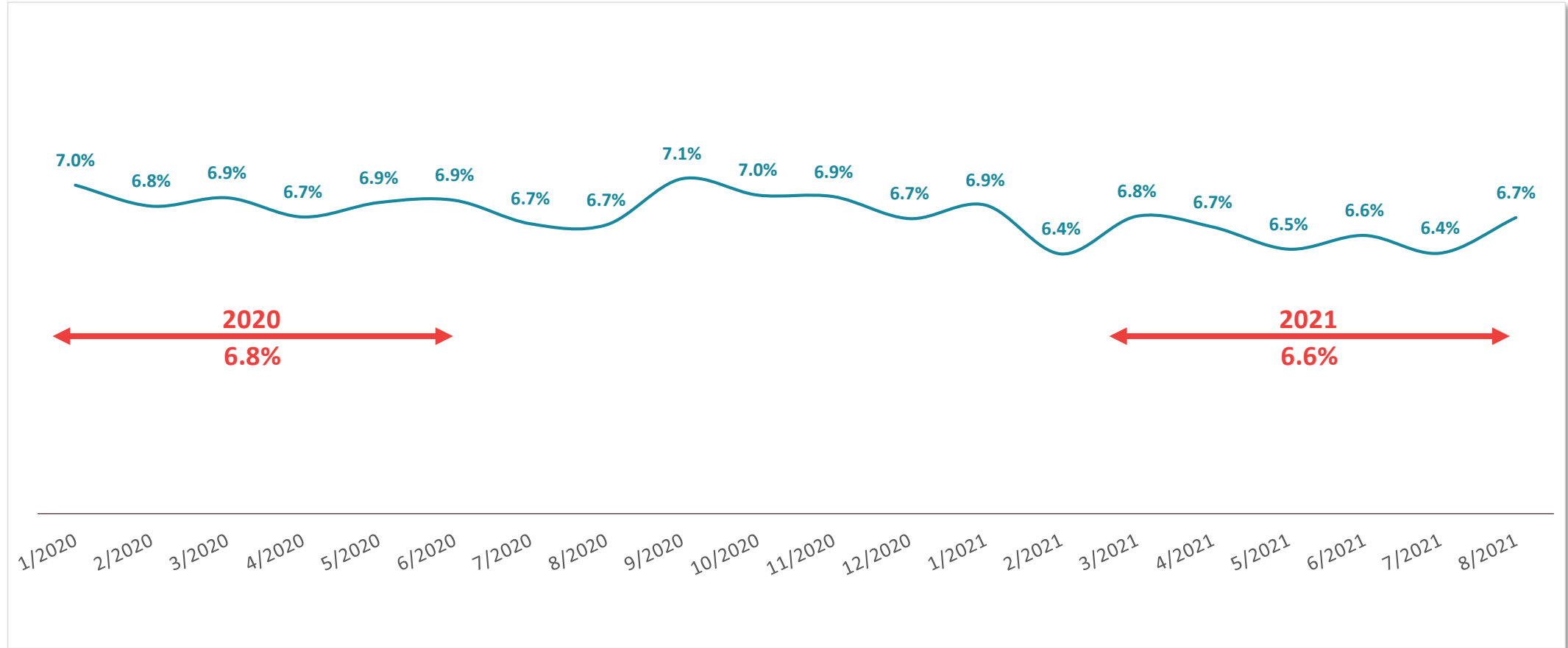


Private Label Market Share - FMCG Market

Private label share records a drop of 0.2 points in current YTD in comparison previous YTD



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



Thank You!



StoreNext

Looking Forward