



# April 2022 Summary

## Main Trends In The Israeli FMCG Market

# Data Base

The data is based on **2,600 stores**

comprised of statewide chains, pharm 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

❖ April shows a growth of 6.0% in sales in the FMCG world compared to April last year, and excluding sales days, the growth stands at 10.1%. The growth in sales in April reduces the decrease in the cumulative period, which stands at 1.9%, compared to the corresponding period last year. Also, this period records a 4.4 point increase in StoreNext price index



❖ The increase in StoreNext's price index is affected by a consistent increase in the index in recent months

❖ StoreNext's price index shows an increase in all fields, which stands out mainly in the fields of home care and beverages, due to the reforms in recent months, they are expected to contribute to the high level of the index later in the year

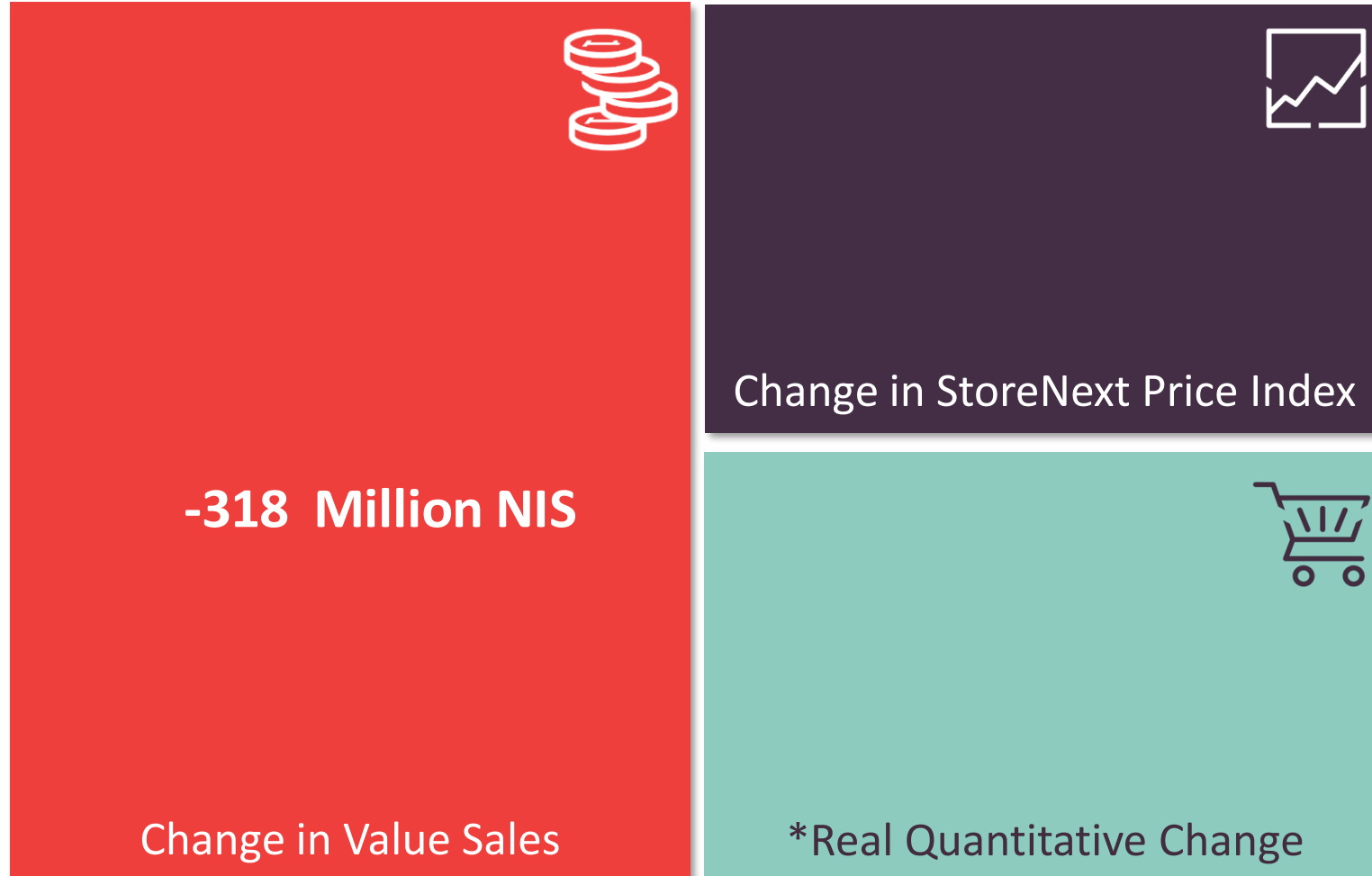


❖ Most of the fields show an increase in the current monthly sales compared to the sales in the corresponding month last year, which is greatly affected by the timing of Passover. In the current cumulative period, there is a mixed trend in sales change rate, both in key worlds in the field of food and beverages and in key worlds in the fields of personal care and home care



# Change in Sales and Price Indices

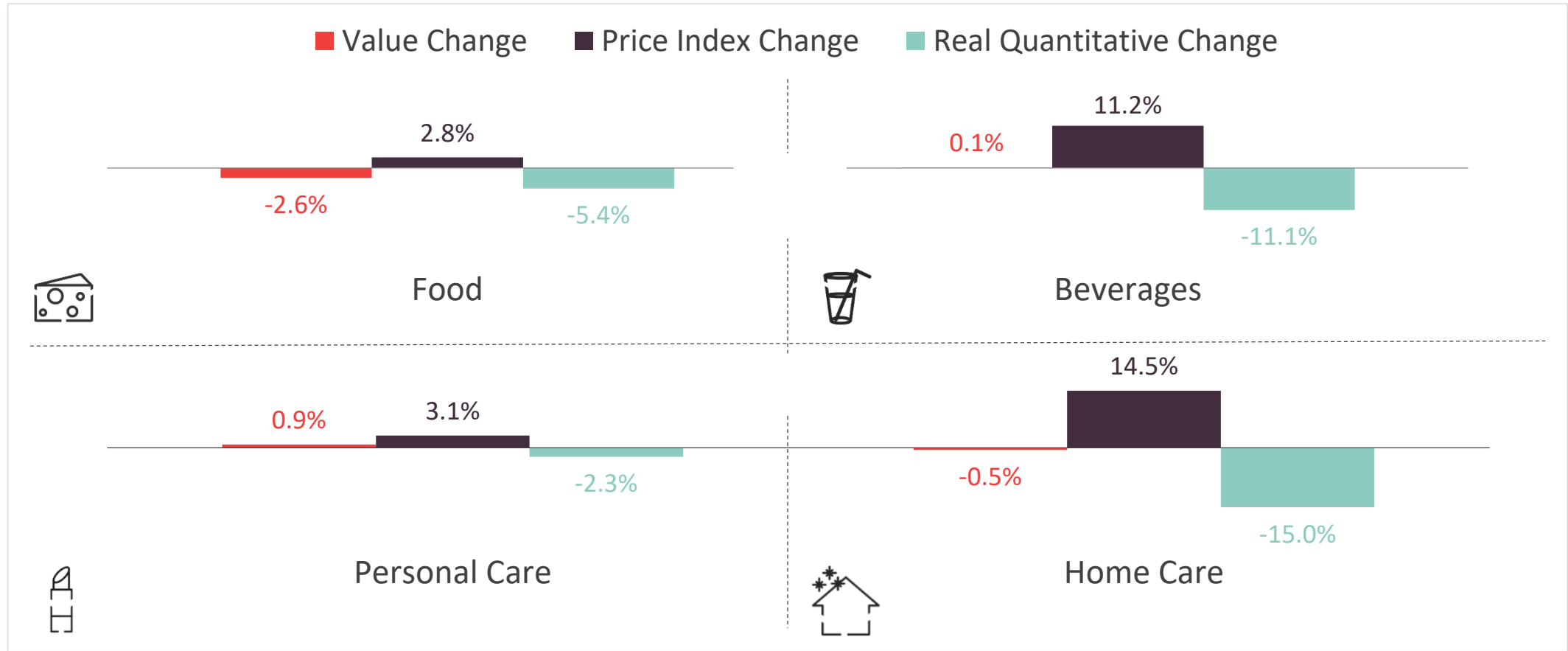
FMCG, YTD 2022 compared to YTD 2021



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

# FMCG YTD Change Rate By Fields (2021 VS 2022)

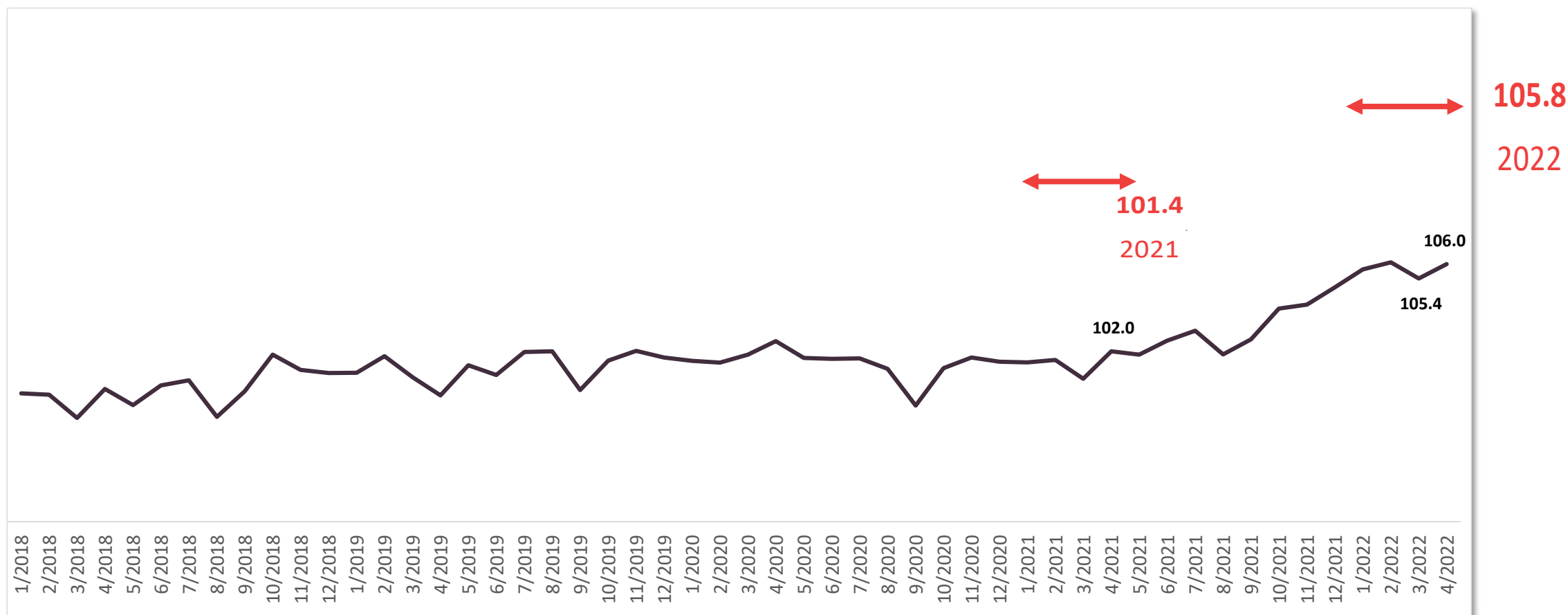
- 🏠 All fields are showing a real decline and the most significant decline is in the field of home care
- 🏠 StoreNext's price index shows an increase in all fields, while home care and beverages fields show a significant increase affected by reforms



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

# The StoreNext Price Index

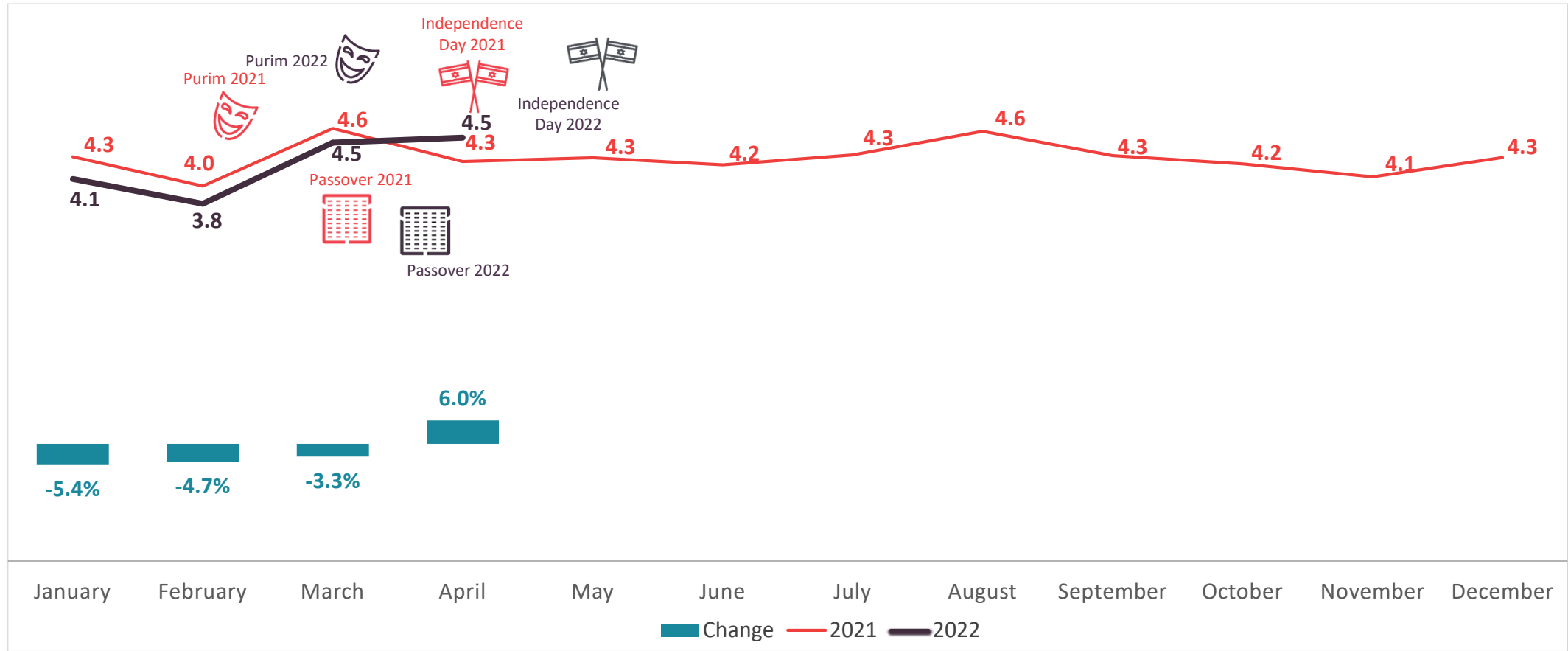
- StoreNext's price index presents an increase of 4.4 points in current YTD compared to previous YTD. Compared to March, April 2022 shows an increase of 0.6 points, and compared to April last year an increase of 4.0 points



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

# Monthly Sales Trend

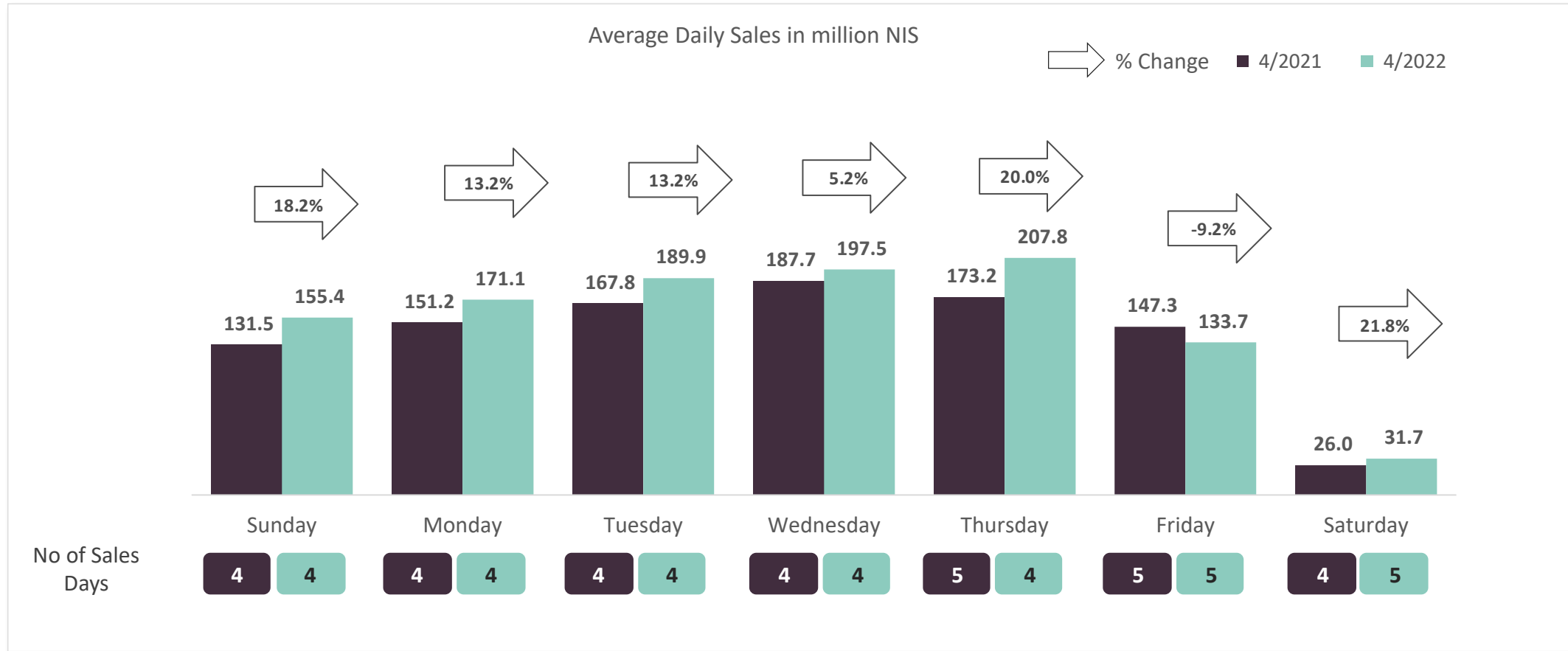
- FMCG sales increased by 6.0% in April compared to April last year and stands at 4.5 billion NIS, an increase of 255 million NIS. The increase in April comes due to the change in the timing of Passover, which took place this year in April and last year in March



\* FMCG Value Sales, Billion NIS

# Sale By Days

- Monthly rate increase is affected by the change in sales days and stands at 6.0%
- Neutralizing change in sales days, April 2022 value change stands at 10.1%

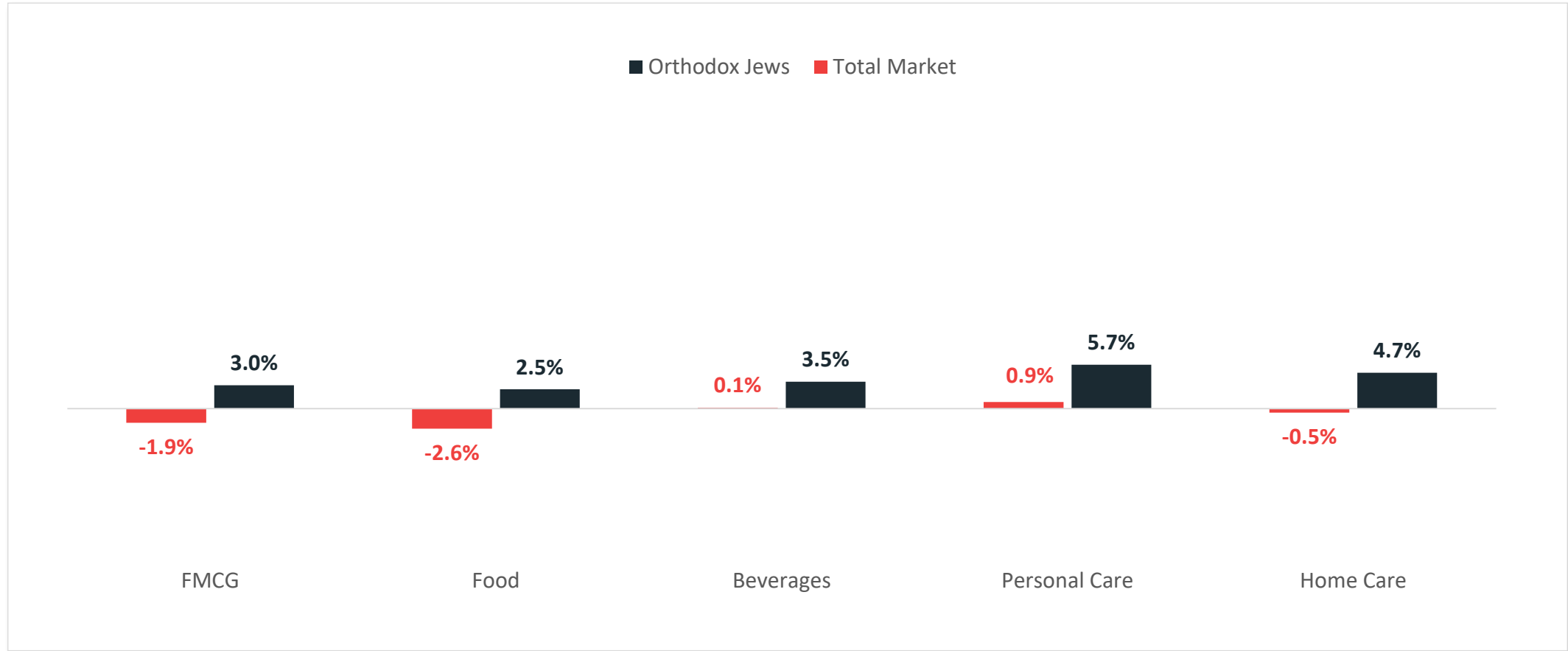


\* Sales (million NIS) by days and percentage of change in sales, current month compared to the same period last year



# Orthodox Jews Sector Value Change Rate

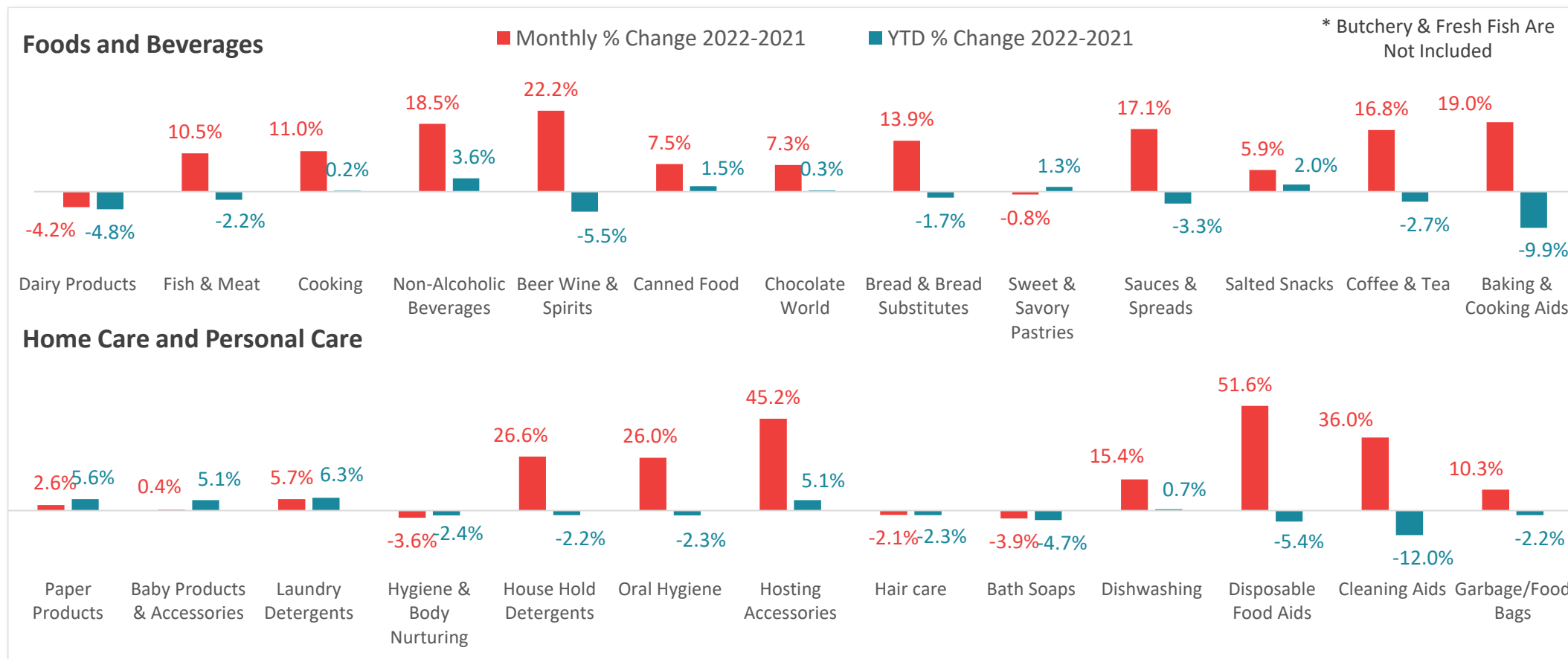
- ❖ The Orthodox sector shows a different trend from the entire market - an increase of 3.0% compared to a decrease of 1.9% in FMCG's value sales in the cumulative period
- ❖ In all fields, a growth trend is recorded that is higher than the rate of change presented by the entire market



\*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

- Most of the fields show an increase in the current monthly sales compared to the sales in the corresponding month last year, which is greatly affected by the timing of Passover
- In the current cumulative period, there is a mixed trend of a change in the rate of sales, both in key worlds in the fields of food and beverages and in key worlds in the fields of personal care and home care



# Rising / Descending Categories – Current Month TY vs LY

🔄 In April 2022, there was an increase in sales of the matzah, wines and cleaning appliances categories, and a decrease in BBQ products and special bread compared to April 2021, sales changes of these categories are affected to some extent by Passover and Independence Day schedules

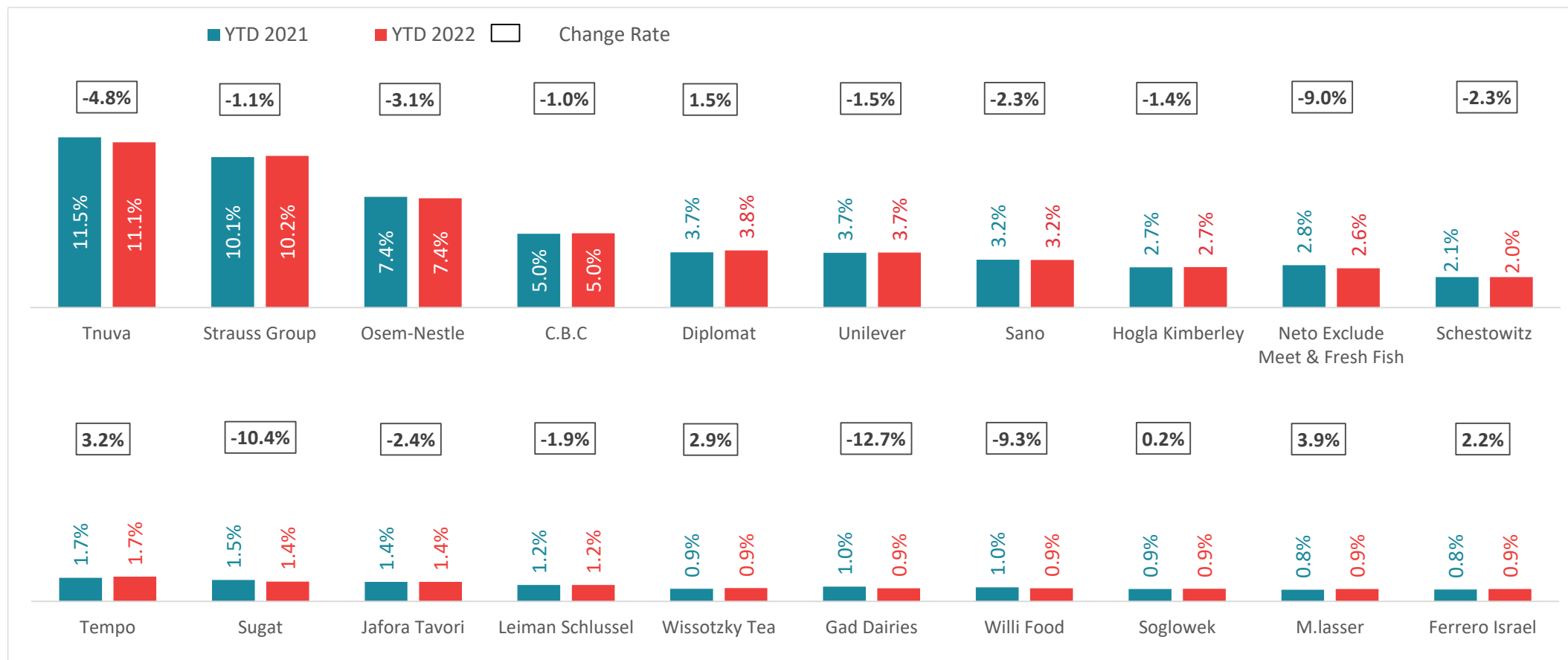


	Value Change Rate	Volume Change Rate	Average Price Change Rate
Matzah	2172.8%	1666.5%	28.7%
Grape Juice Tirosh	249.6%	282.4%	-8.6%
Basic Cookies	118.1%	78.5%	22.2%
Frozen beef/lamb	85.5%	85.5%	0.0%
Cakes	75.8%	84.6%	-4.8%
Cleaning Appliances	75.7%	72.3%	2.0%
Red wines	70.1%	70.7%	-0.3%
Kids World Chocolate	-18.5%	-6.0%	-13.3%
Special bread	-27.9%	-31.8%	5.8%
BBQ Products	-8.4%	-12.6%	4.9%

# Market Share and Suppliers' Growth

🏠 Top 20's SOM reaching 62.8% in current YTD, records a growth of 0.5 points compared to YTD 2021

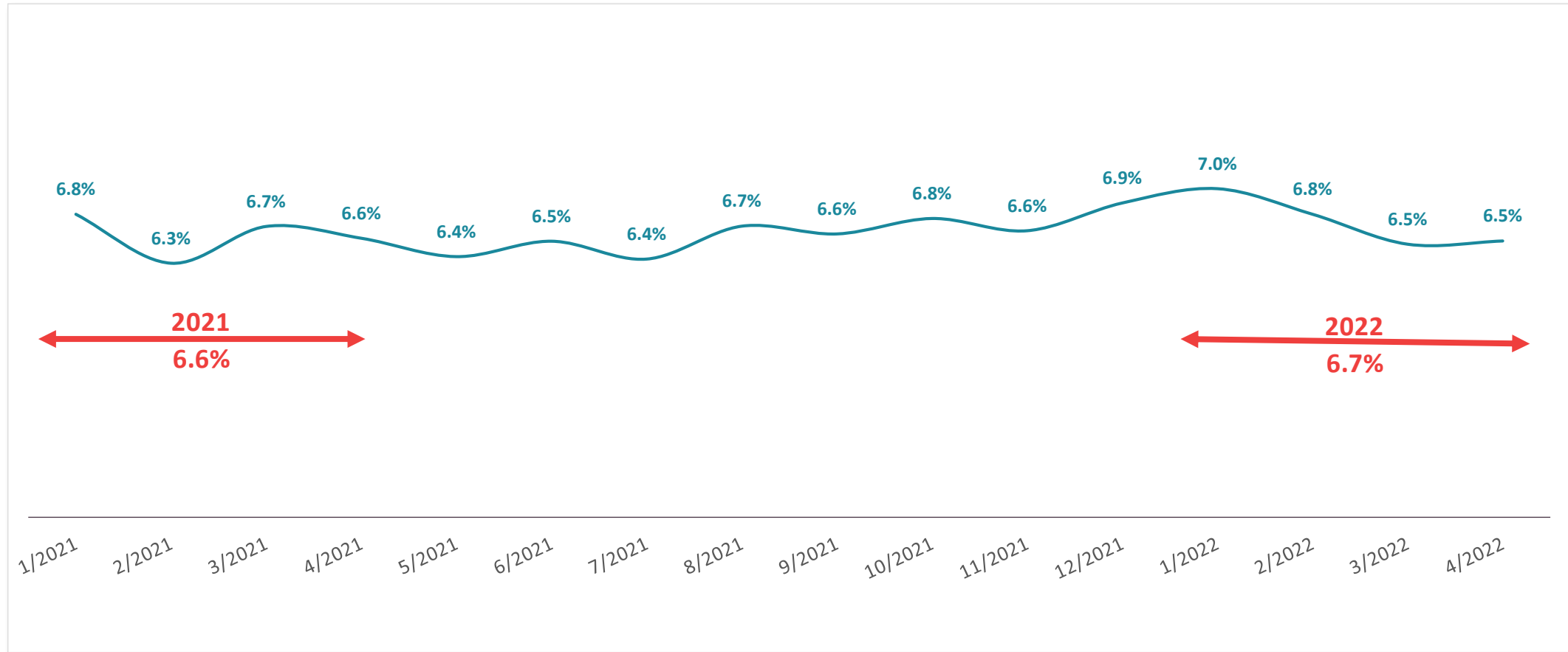
🏠 Top 10's SOM stands at 51.8% in current YTD and presents a increasing of 0.4 compared to previous period



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

# Private Label Market Share - FMCG Market

📈 The private label market share records an increase of 0.1 market share in the current cumulative period compared to the same period last year, while April 2022 shows a decrease of 0.1 points compared to April 2021



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



A still life composition on a light green background featuring various Passover symbols. In the top left is a purple Seder plate with the text 'FILL UP' and 'FILL UP' in a decorative frame. To its right is a white plate with a green leaf and a white egg. Further right is a clear glass and a red wine bottle with a white cap. In the bottom left and right are large, rectangular, golden-brown matzahs with a dark border. Scattered around are several red and yellow tulips, some on sticks, and several whole almonds. The text 'Passover 2022' is centered in a bold, red, sans-serif font.

# Passover 2022

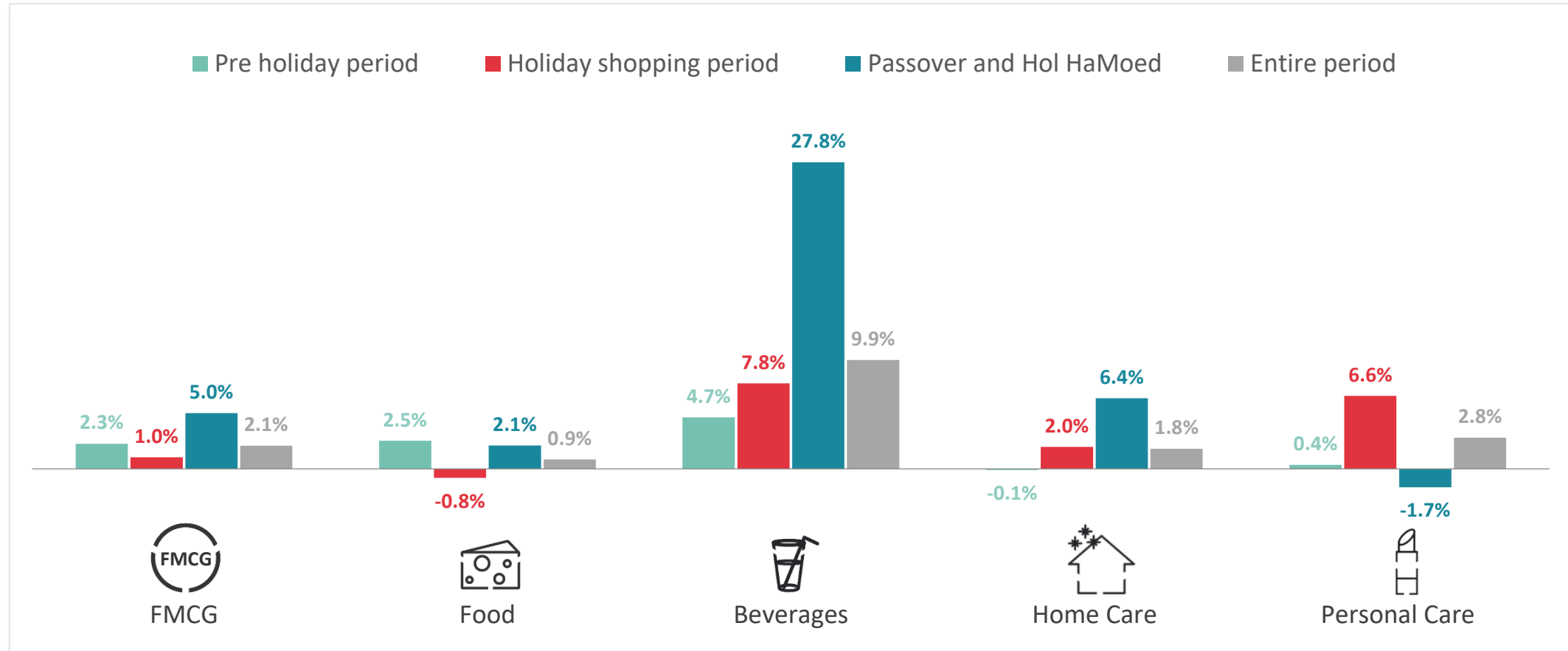
# Passover 2022 - Periods



						→	Passover 2022
Saturday 19.3.22		Friday 01.04.22	Saturday 02.04.22		Friday 15.4.22 Holiday eve	Saturday 16.4.22 Holiday	Friday 22.4.22
						→	Passover 2021
Sunday 28.2.21		Saturday 13.3.21	Sunday 14.3.21		Saturday 27.3.21 Holiday eve	Sunday 28.3.21 Holiday	Saturday 3.4.21

# Value sales Change Passover By Fields – 2022 vs 2021

- All fields grow in sales throughout the entire period compared to the same period last year, the food field shows the lowest change, while beverages shows the highest change. Even during the holiday shopping period beverages field recorded the highest growth compared to last year while food field declined



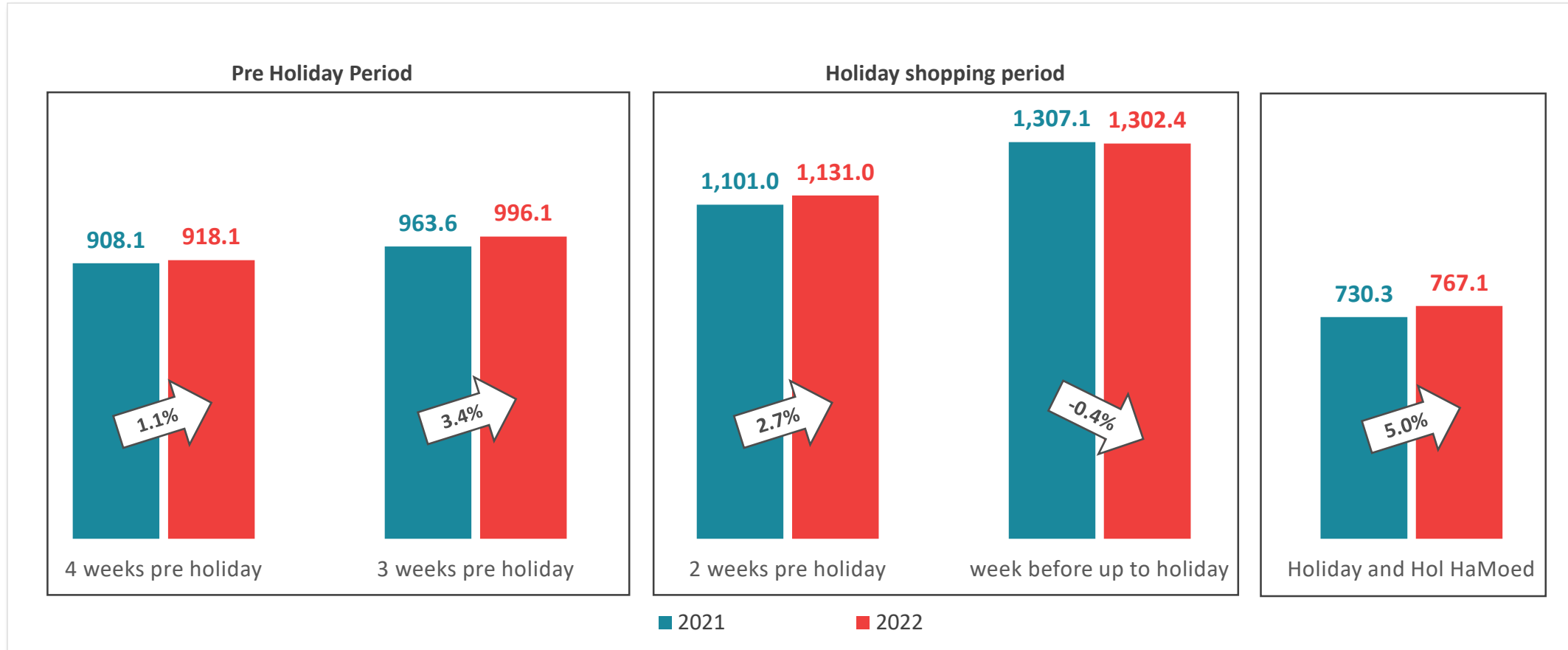
\* Passover 2022 Compared to Passover 2021



# Passover sales - yearly comparison



- Except for the week preceding the holiday, all weeks show an increase in the sales compared to the weeks in 2021
- The most noticeable growth is in the holiday week and Hol HaMoed, while in the week before the holiday there is a slight decrease in FMCG sales compared to last year (-0.4%)

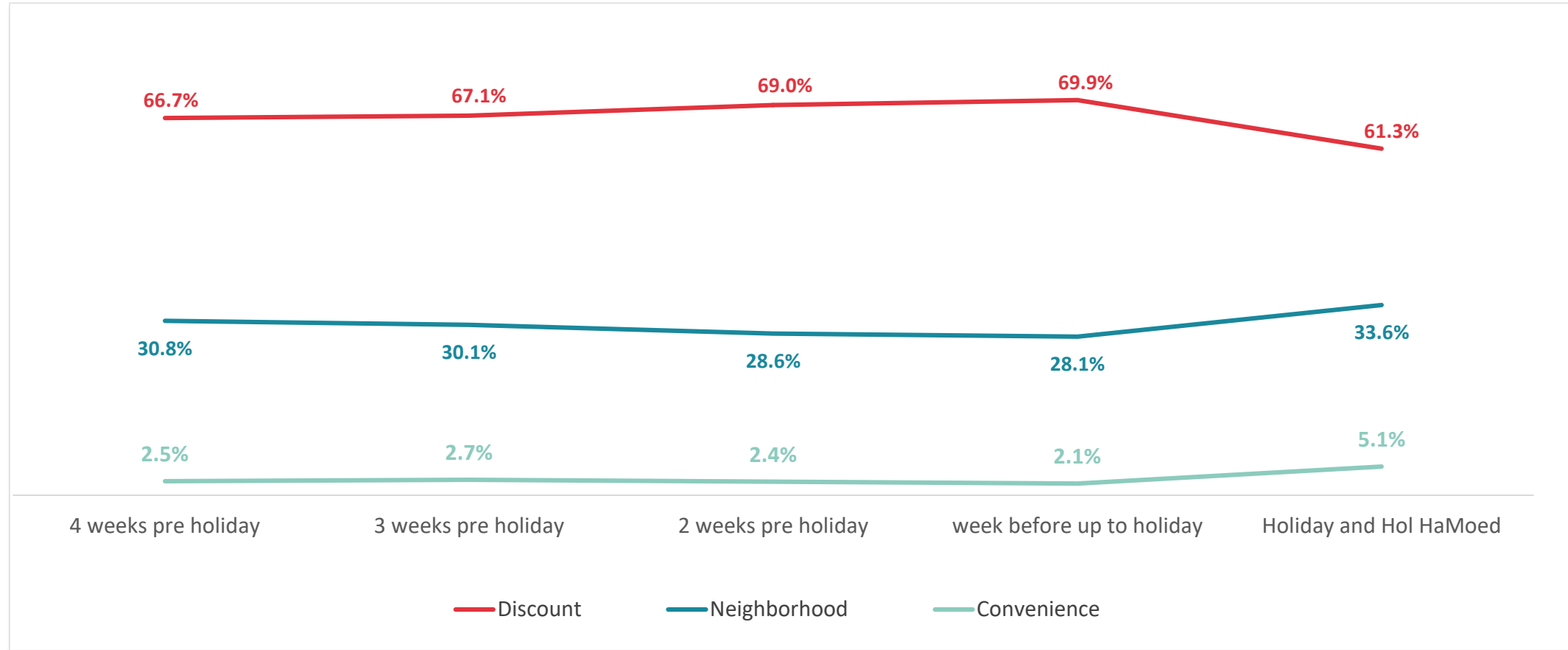


\* FMCG sales, million NIS, by weeks

# Sales distribution by channels throughout the holiday



- ❏ The discount channel shows a decrease in the partiality of sales during the holiday and the holiday week, and at the same time significant increases of the neighborhood channel and convenience affected by trips and leisure of consumers which leads to more purchases and shopping "on the go" during this period



\* Sales distribution by channels

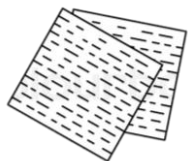
# Next, we will examine the sales trends of the Passover categories

🔗 In order to examine the holiday trends, we will examine the holiday categories during the holiday shopping period (two weeks)



## Passover

### Passover Products



Haroset

Matzah

Passover cookies

Gefilte fish

### Hosting

Chocolate boxes

Wines and Tirosh

Disposable housewares

Disposable maps

Disposable napkins

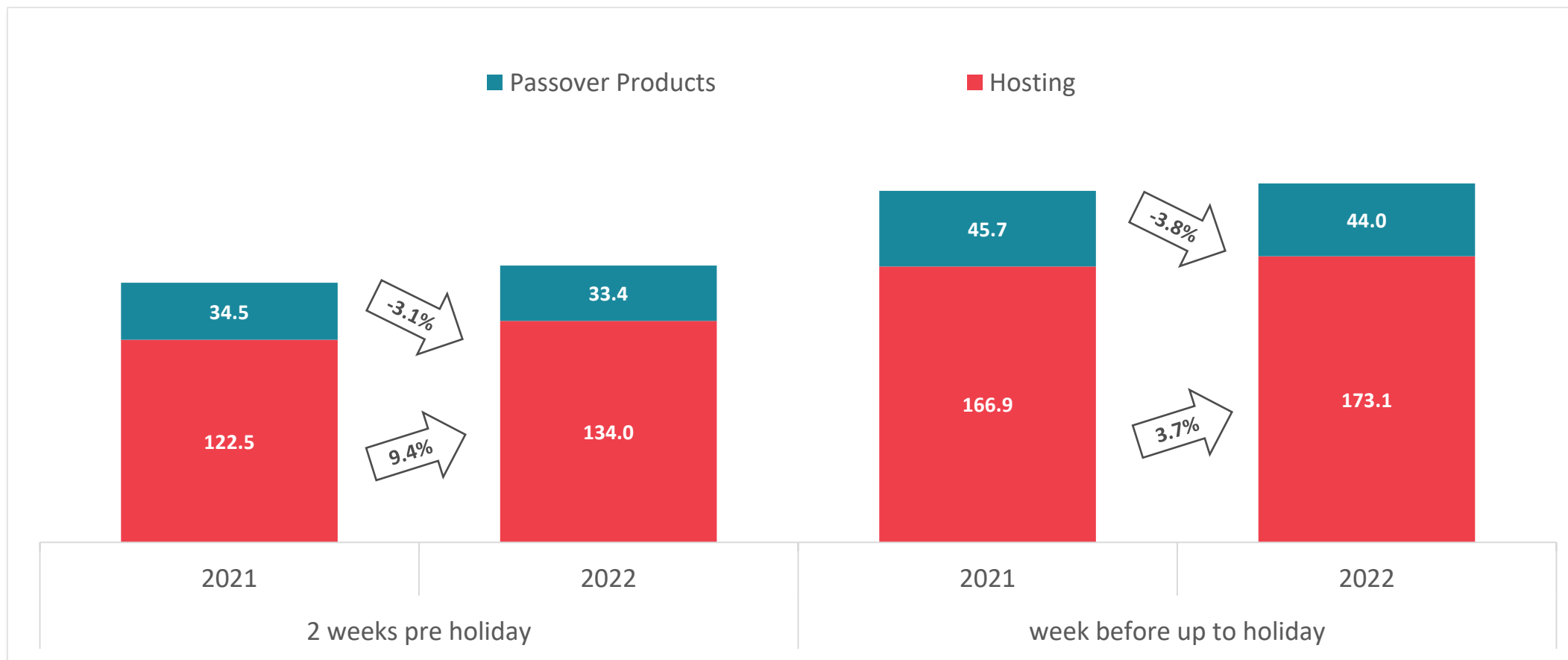
Non-alcoholic beverages

Nuts



# Holiday Shopping Period - Sales Trends Holiday Categories

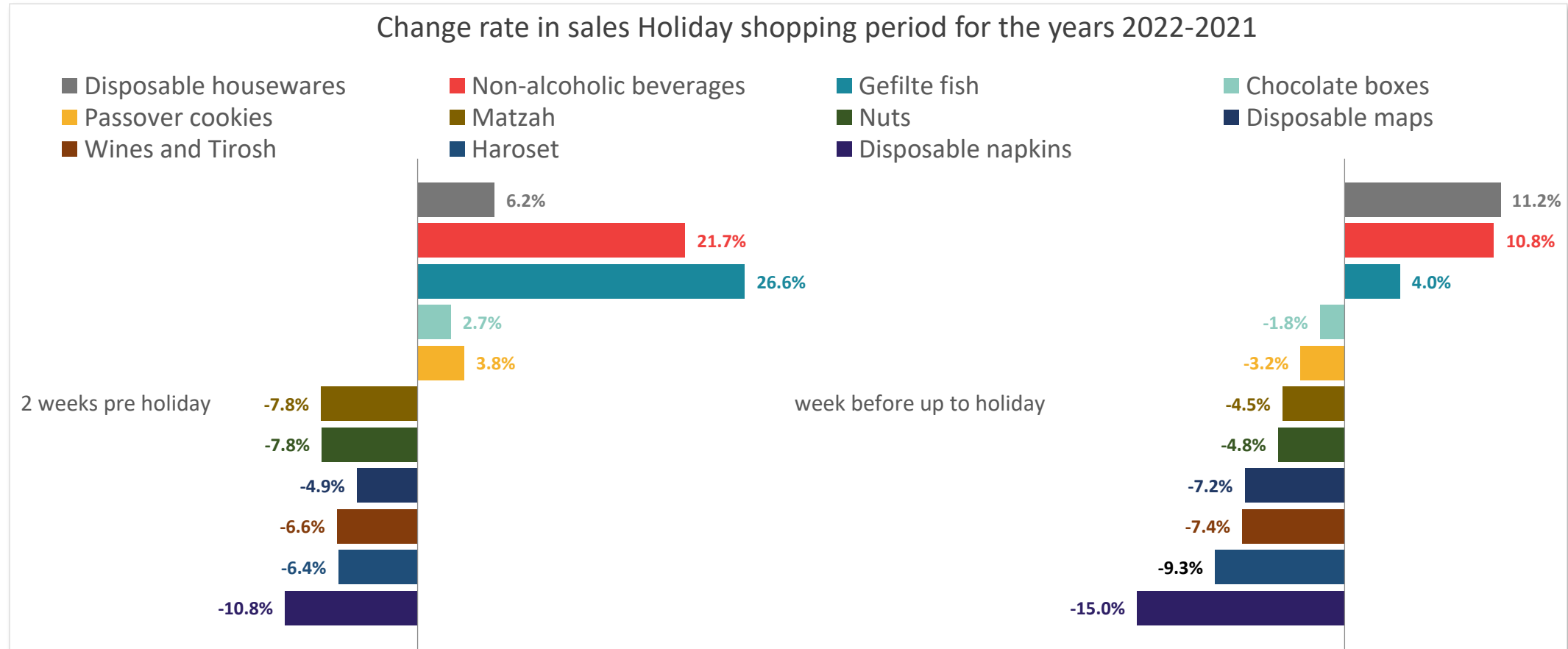
- Passover products show a decrease in sales compared to the corresponding weeks last year. This trend is probably influenced by the rise of travel abroad on Passover this year, which reduced the number of families celebrating the holiday in Israel. On the other hand, hosting categories show an increase in sales in the two weeks of holiday shopping in 2022



\* sales, millions NIS and change in sale

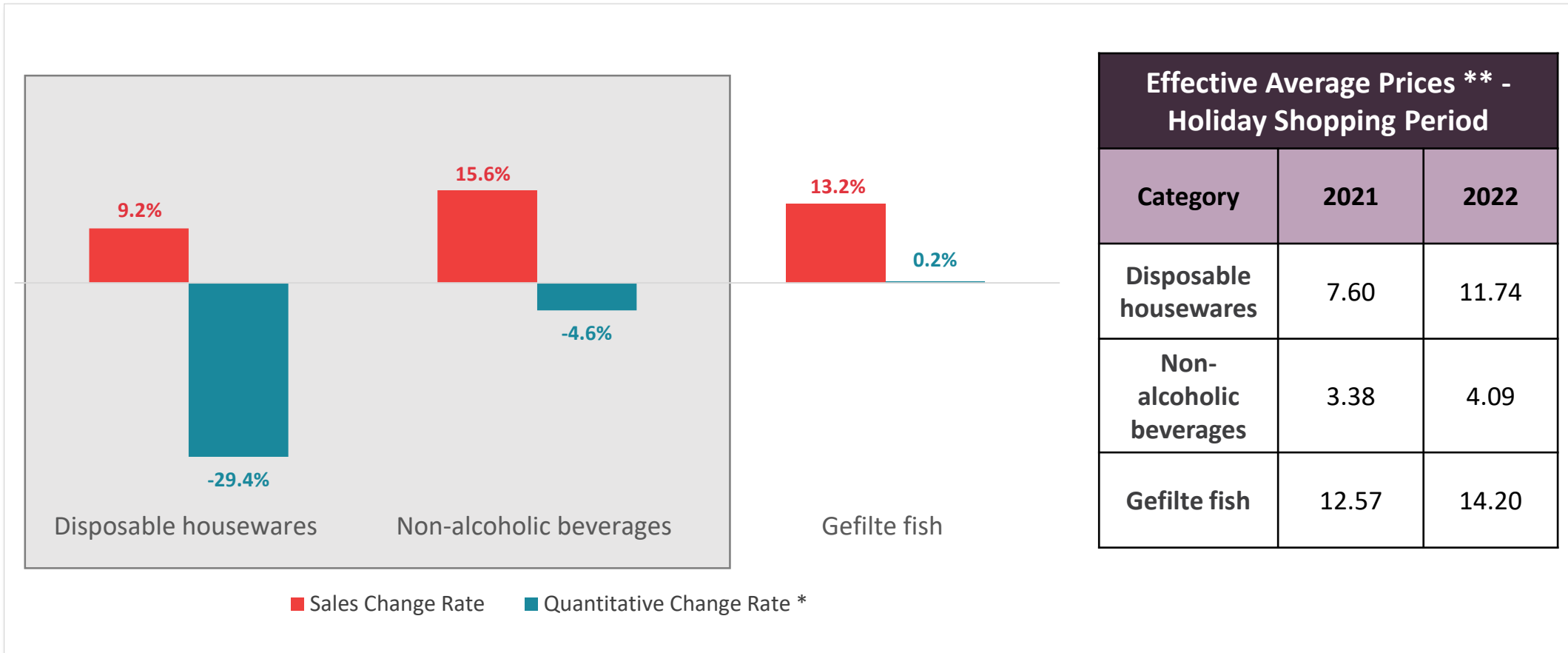
# Holiday shopping period – holiday categories change rate

- Out of all the categories, there are 3 that show growth during the holiday shopping period compared to the same period last year - disposable housewares, non-alcoholic beverages and gefilte fish



# Holiday shopping period – holiday categories change rate

- Although all growing categories show an increase in the effective average price \*\* during the shopping period of 2022 compared to the same period last year, it is evident that gefilte fish shows stability in quantitative sales \* (growth of 0.2%) while non-alcoholic beverages and disposable housewares show a significant decreases in quantitative sales which are affected by the deposit law on large beverage bottles, the soft drink reform and the one-time tools reform



\* Quantitative sale - the quantitative index is determined according to the type of category; Gefilte fish and Disposable Housewares are measured in units and non-alcoholic beverages in liters

\*\* Effective average price - the price is calculated for each category based on the quantitative index

# Thank You!



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StoreNext

Looking Forward