



January 2024 Summary

Main Trends In The Israeli FMCG Market

Data Base

The data is based on **3,000 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 87%** 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

- ❏ January shows a growth of 7.4% in FMCG sales compared to January last year, and excluding difference in sale days there is an increase of 5.8%
- ❏ Value rise continues and records an increase of 3.9 points in StoreNext's price index



- ❏ All fields show realistic growth compared to January 2023 – particularly notable is the significant growth in the Home Care.
- ❏ Compared to the same month last year, the food field demonstrates a significant increase, while there are declines Home Care and Beverages due to the cancellation of tax reforms.

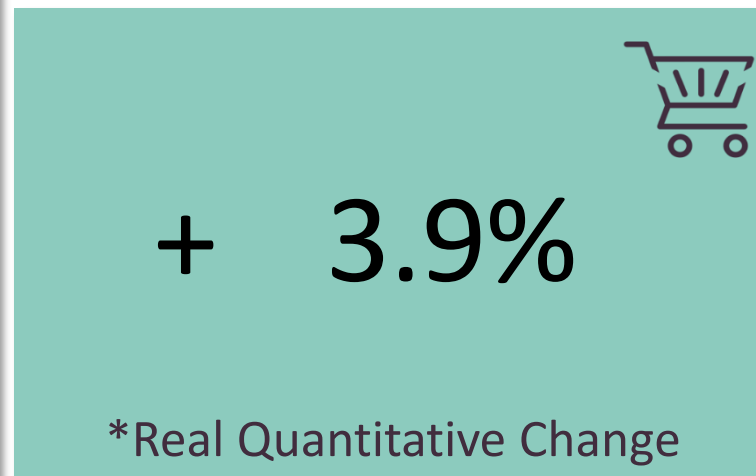


- ❏ January shows an increase in Baking & Cooking Aids, Chocolate World, Fish& Meat, and Dishwashing
- ❏ Among the declining fields- Hosting Accessories and Non- Alcoholic Beverages



Change in Sales and Price Indices

FMCG, YTD 2024 compared to YTD 2023

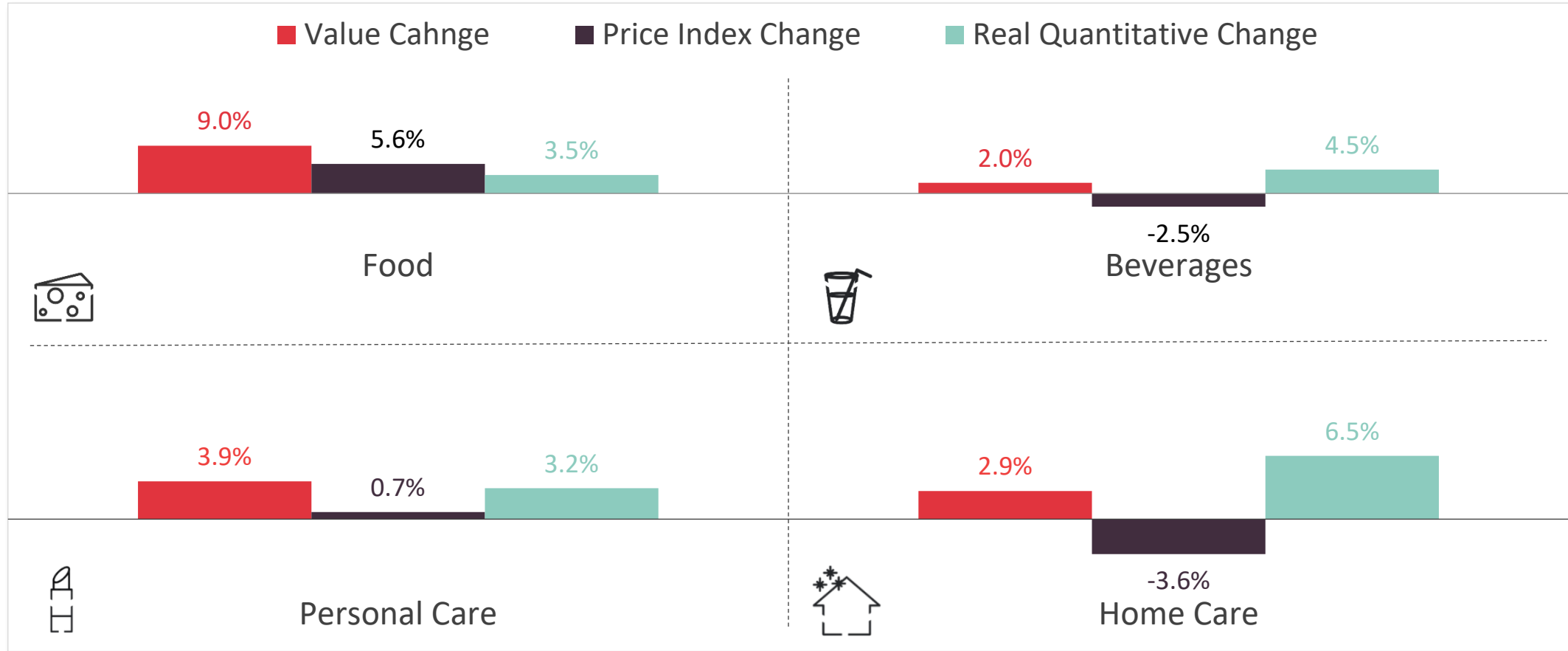


* Real Quantitative Change – Value sales growth deducting StoreNext Price Index changes (neutralized of mix effects)

FMCG YTD Change Rate By Fields (2024 VS 2023)



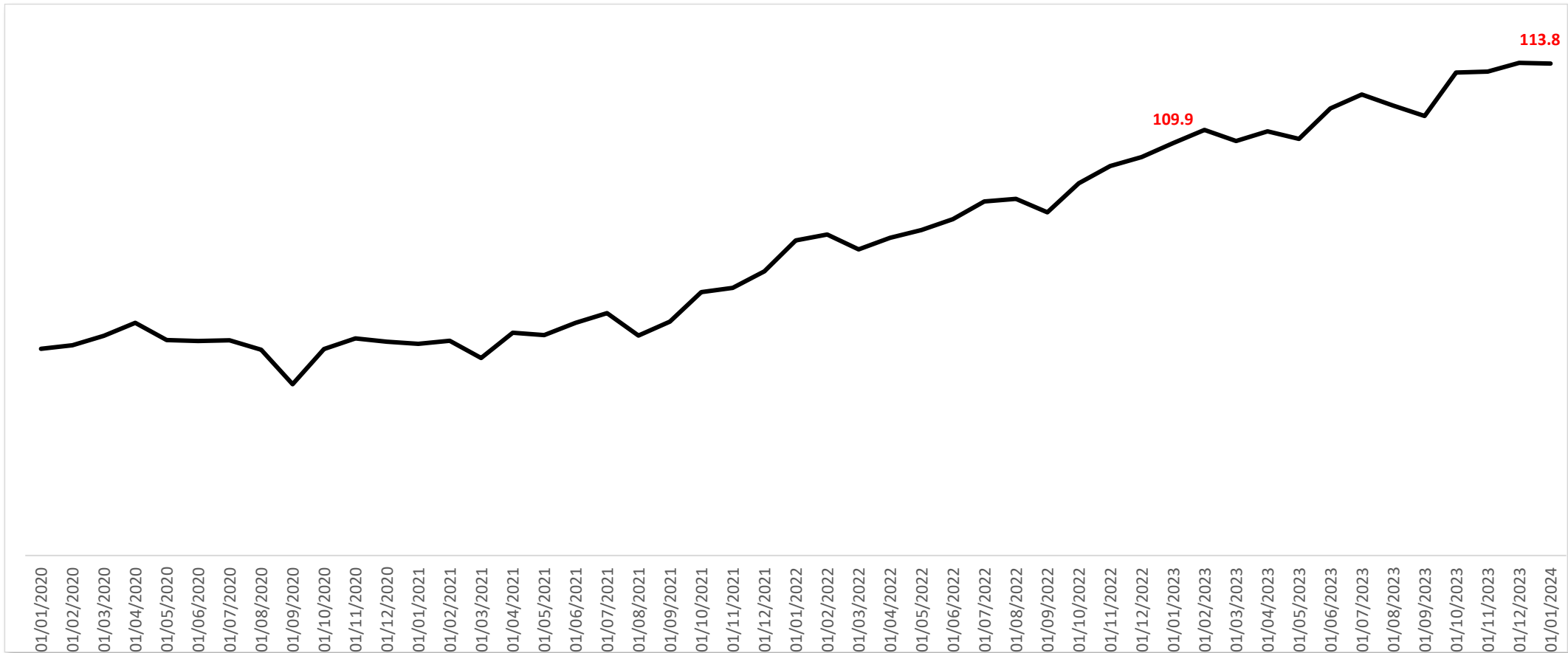
- 🏠 All fields are showing a real quantitative rise, the highest rise is in Home Care
- 🍷 Food field shows a significant increase in the index in the current month, while Home Care shows a sharp relative decline. The beverages field continues to decline due to the cancellation of the reform



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

The StoreNext Price Index

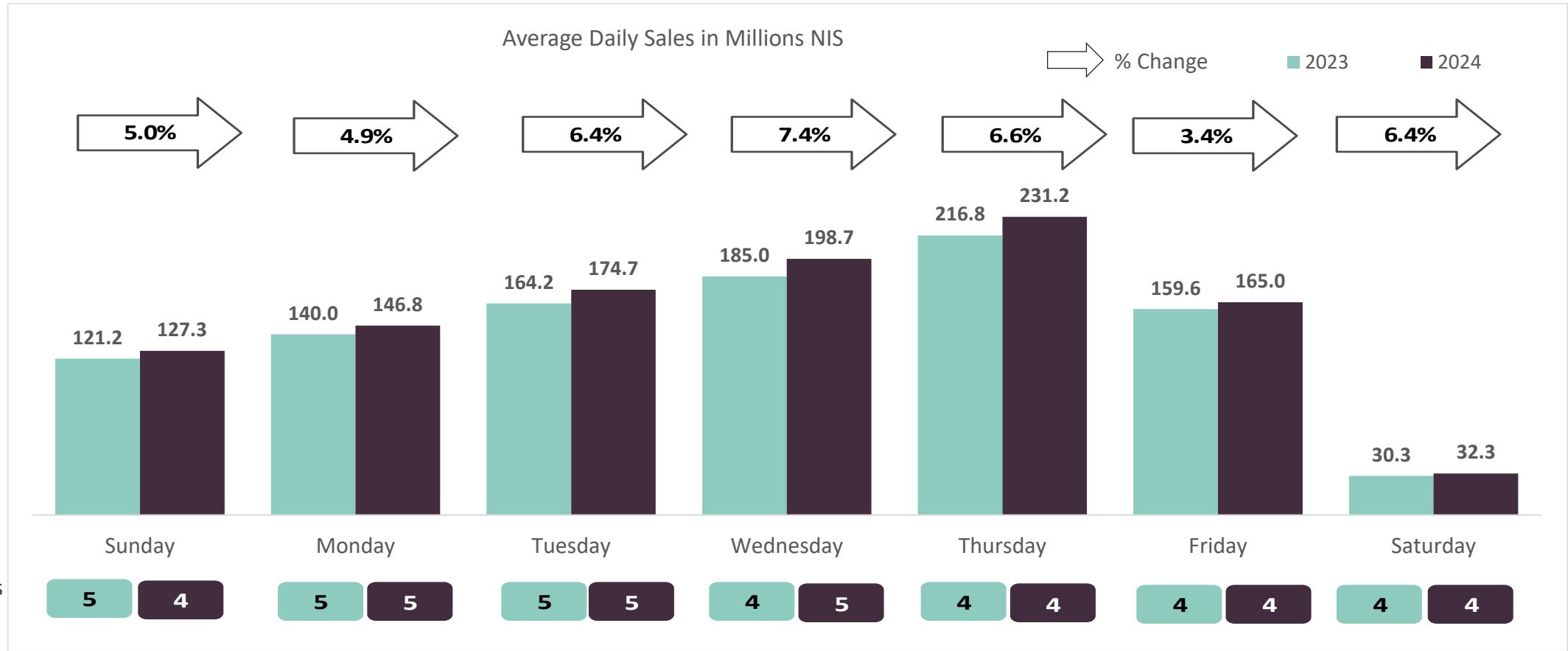
- 📊 StoreNext's price index presents an increase of 3.9 points this January compared to January last year
- 📊 Compared to December 2023 the Price index show stagnation



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

Sale By Days

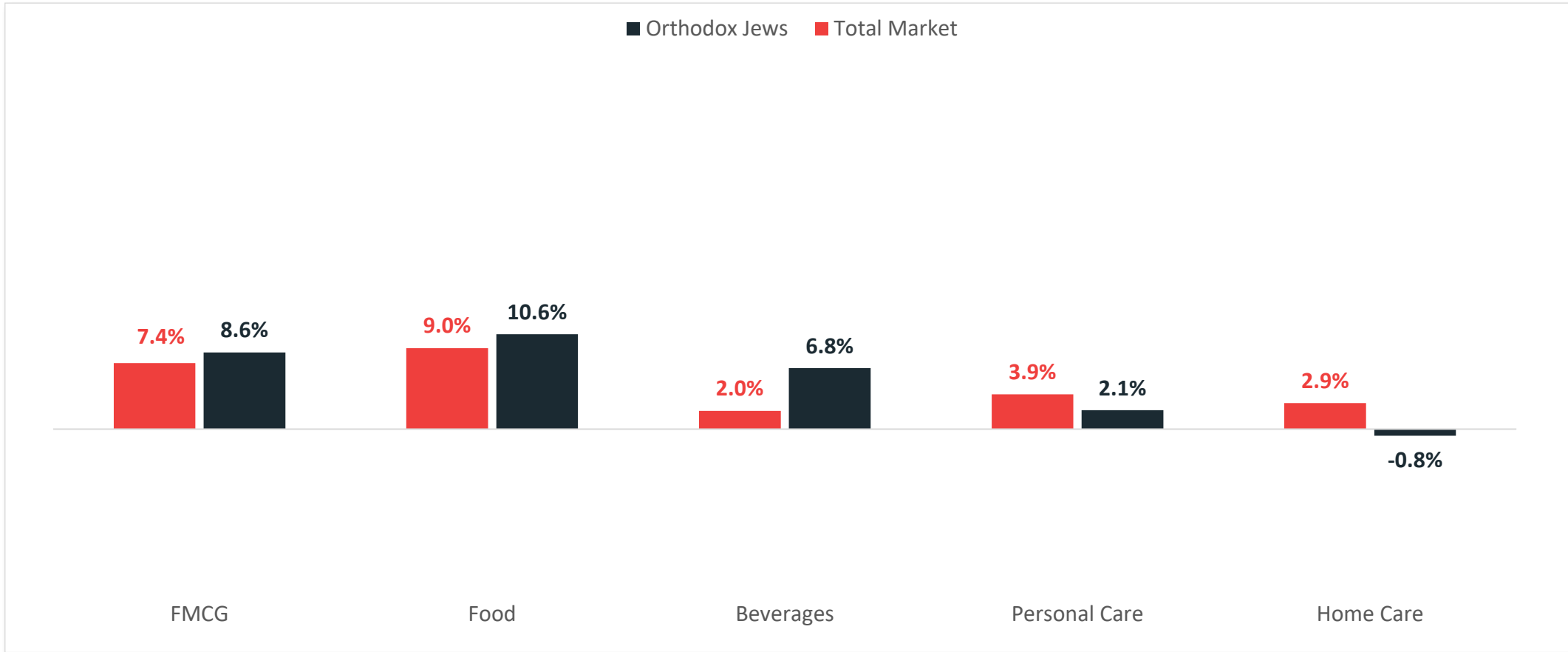
🔄 Monthly rate shows an increase and stands at 7.4%, and excluding difference in sale days there is an increase of 5.8%



* 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 Jews sector shows a significant growth compared to total market - an increase of 8.6% compared to an increase of 7.4% in FMCG's value sales this January
- ⦿ Food and Beverages show a higher growth rate in Orthodox Jews sector compared to total market growth, one can also notice a decline in Home Care

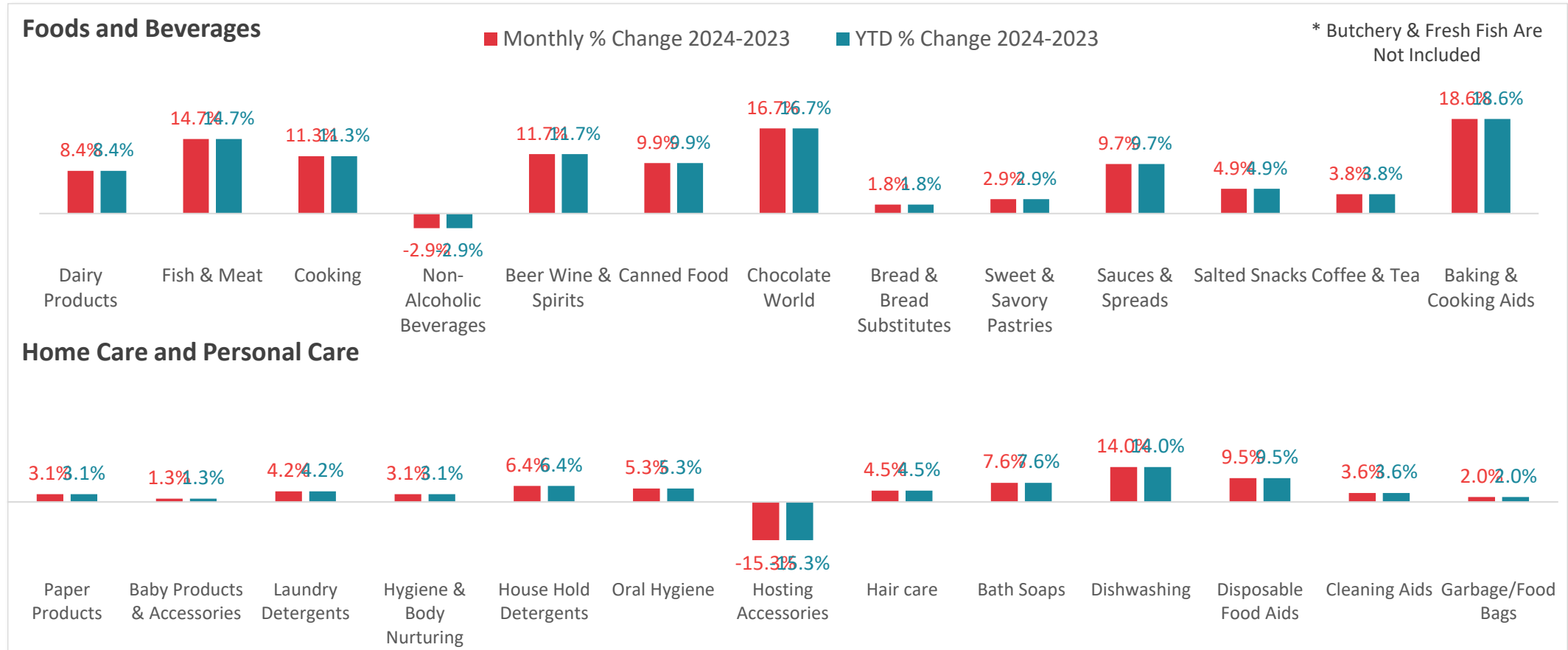


*Orthodox Jews– only stores with orthodox attributes, that are reflected in location, chain and basket composition, excluding Orthodox Jews population sales in General sector

Value Sales Change in Key Fields



- January shows an increase in Baking & Cooking Aids, Chocolate World, Fish & Meat, and Dishwashing
- Among the declining fields- Hosting Accessories and Non- Alcoholic Beverages

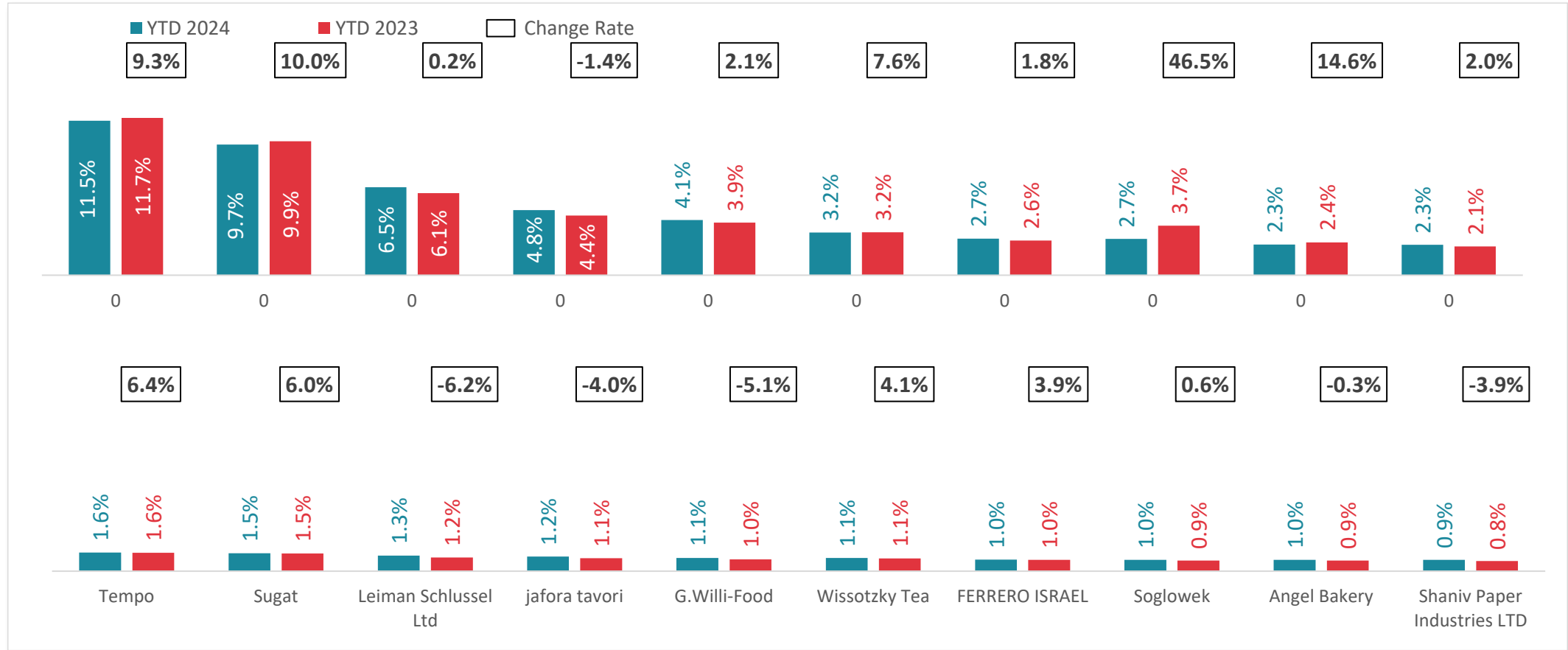


Market Share and Suppliers' Growth



🏠 Top 20's SOM reaching 61.4% this January, an increase of 0.1 compared to January last year

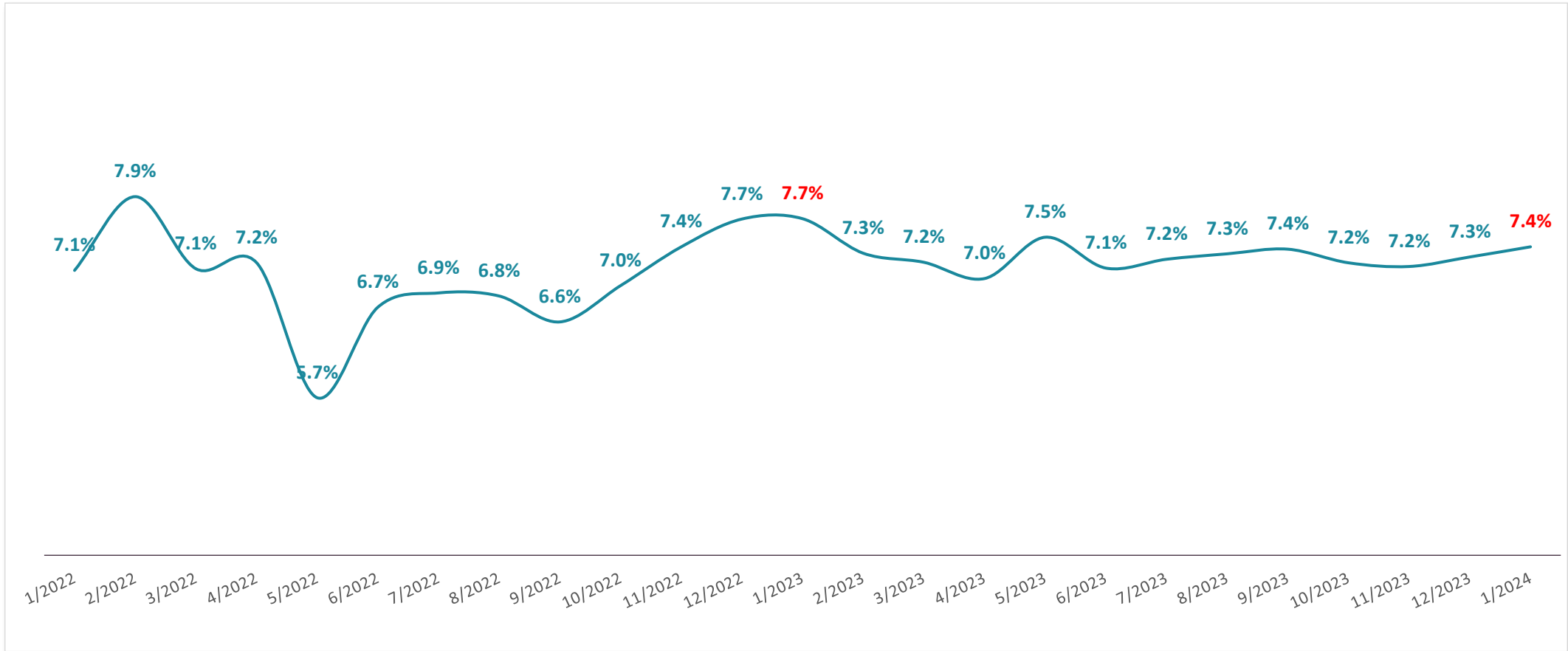
🏠 Top 10's SOM stands at 50.0% this January and presents an increase of 0.3 compared to previous January last year



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

Private Label Market Share - FMCG Market

Private Label share records a decrease of 0.3 market share points This January compared to January last year. However, compared to December 2023 PL market share rises in 0.1 points



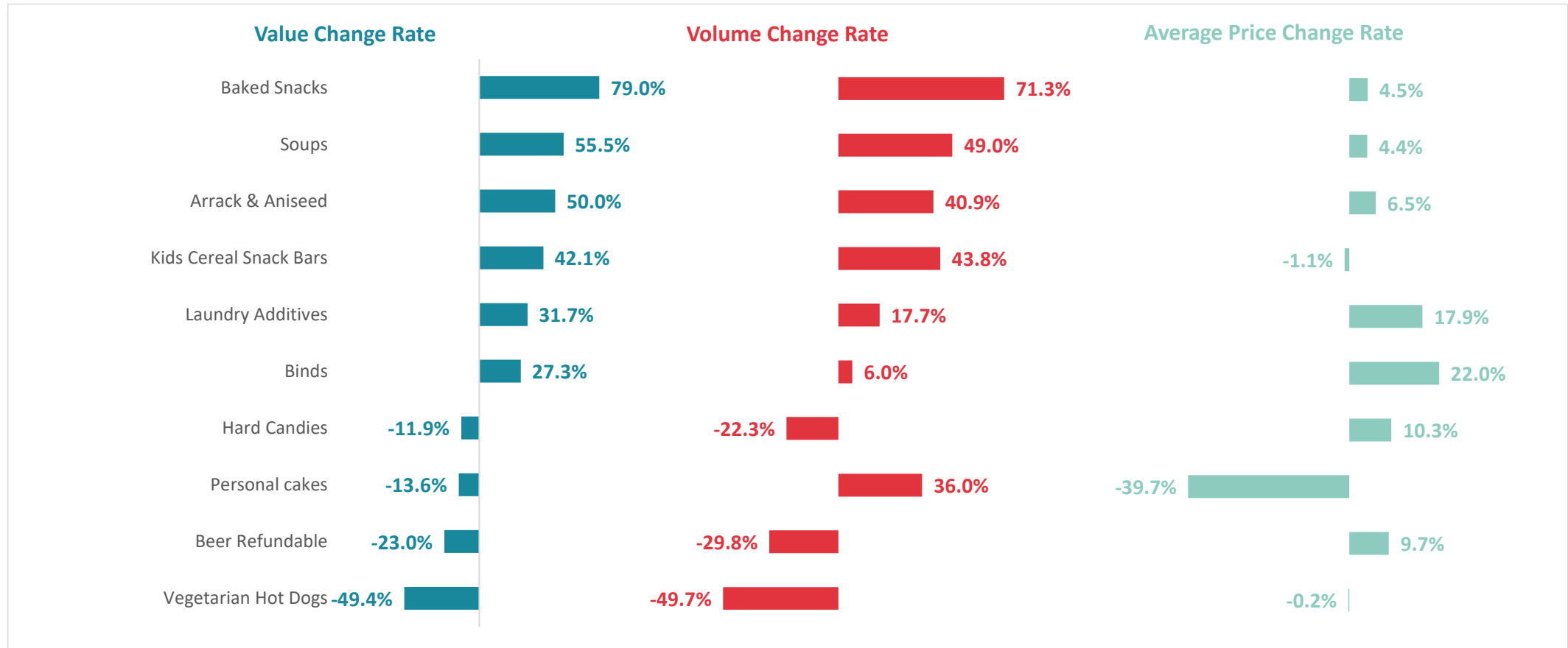
* Value Share (FMCG Market- Excluding Butchers, Bakery, Fruits and Vegetables and Cigarette data)

Rising / Descending Categories – Current Month TY vs LY

🔄 Among the growing categories – Baked Snacks, Arrack & Aniseed, Kids Cereal Snack Bars, the rise in binds derives from most Sub Categories, lead by premium popsicles and lite ice cream



🔄 Among the declining categories – Vegetarian Hot dogs, Beer Refundable, Personal Cakes, Hard Candy



Thank You!



StoreNext

Looking Forward