



May 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

- 🏠 May shows a rise of 6.0% in FMCG sales compared to May last year, and excluding difference in sale days there is an increase of 4.2%
- 🏠 Value rise continues and, in This month, records an increase of 6.3 points in StoreNext's price index, this YTD records an increase of 4.6points



- 🏠 All fields show a real quantitative change, lead by Personal Care and Home Care
- 🏠 Food, Personal Care and Beverages shows a rise, while the decrease in the index is seen in Home Care.

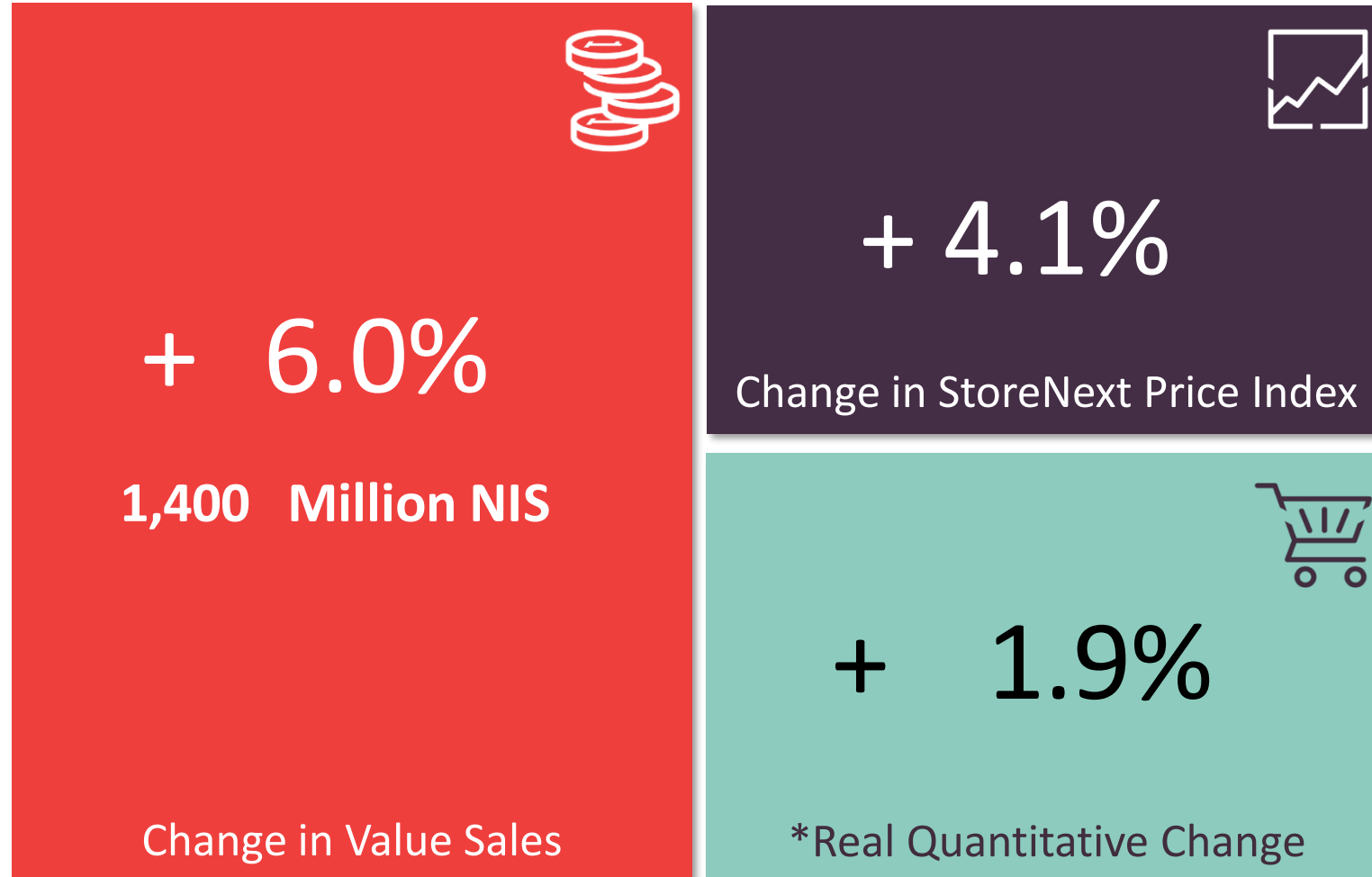


- 🏠 May shows an increase in in Fish & Meat, Beer Wine & Spirits, Chocolate World, some of the growth is related to Independence Day timing- this year in the middle of May and last year in April
- 🏠 There is also an increase this YTD in Dishwashing, Baking & Cooking Aids



Change in Sales and Price Indices

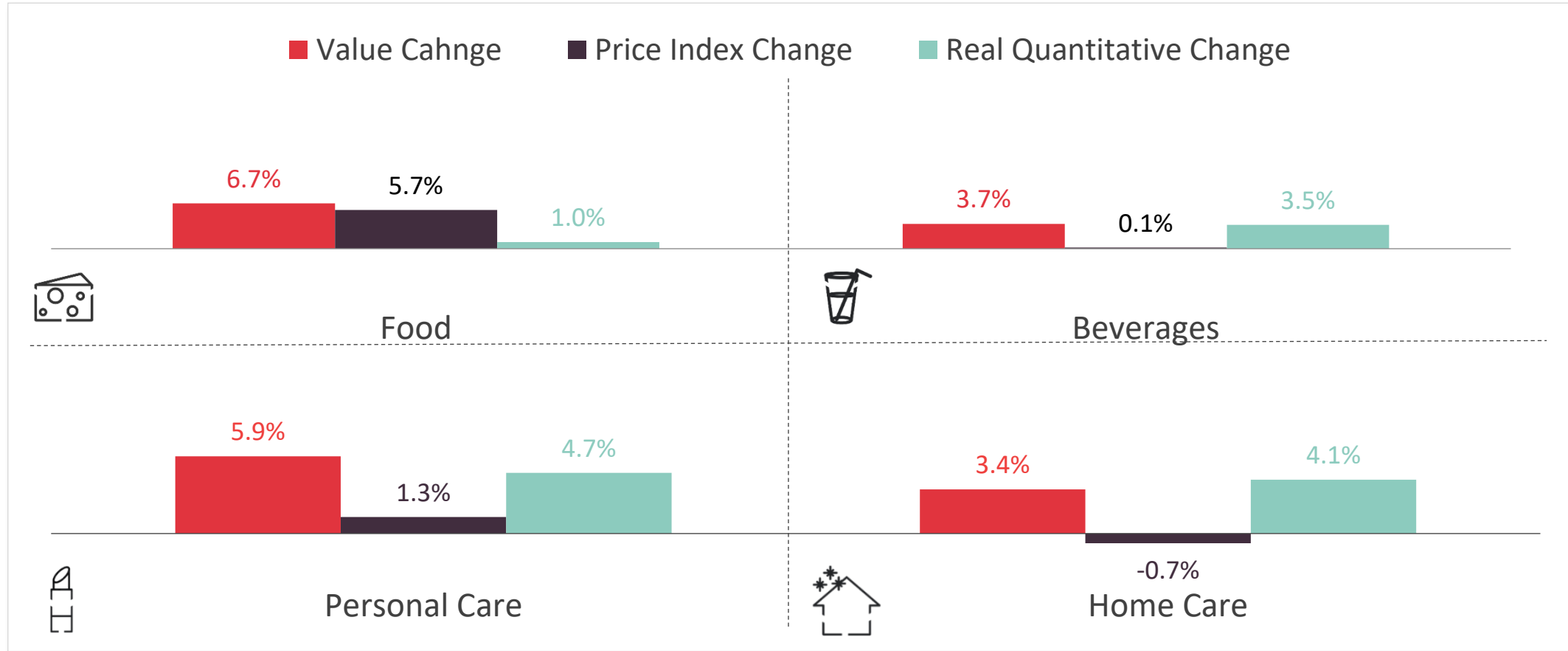
FMCG, YTD 2024 compared to YTD 2023



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

FMCG YTD Change Rate By Fields (2024 VS 2023)

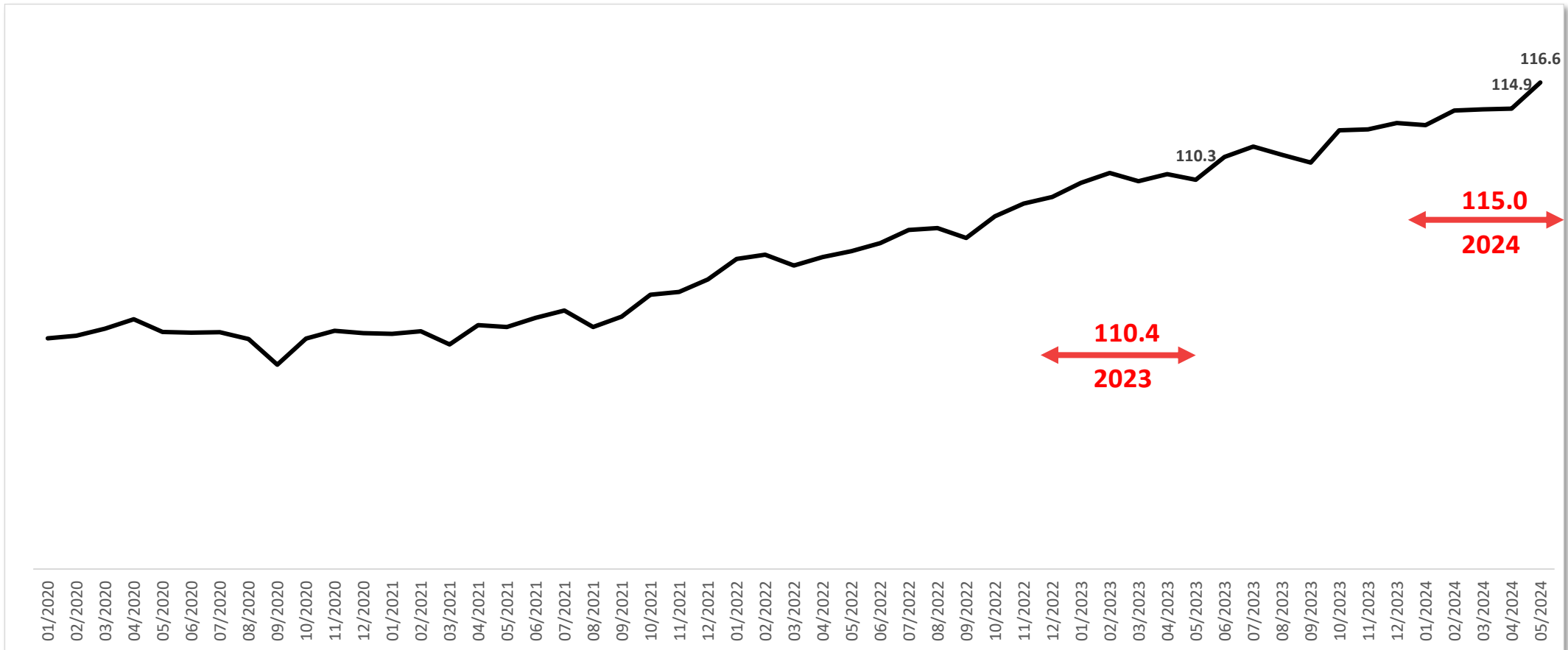
- 🏠 All fields are showing a real quantitative rise, most significant in Personal Care
- 🍷 Food field shows a significant increase in the index in the current YTD, while Home Care shows a relative decline



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

The StoreNext Price Index

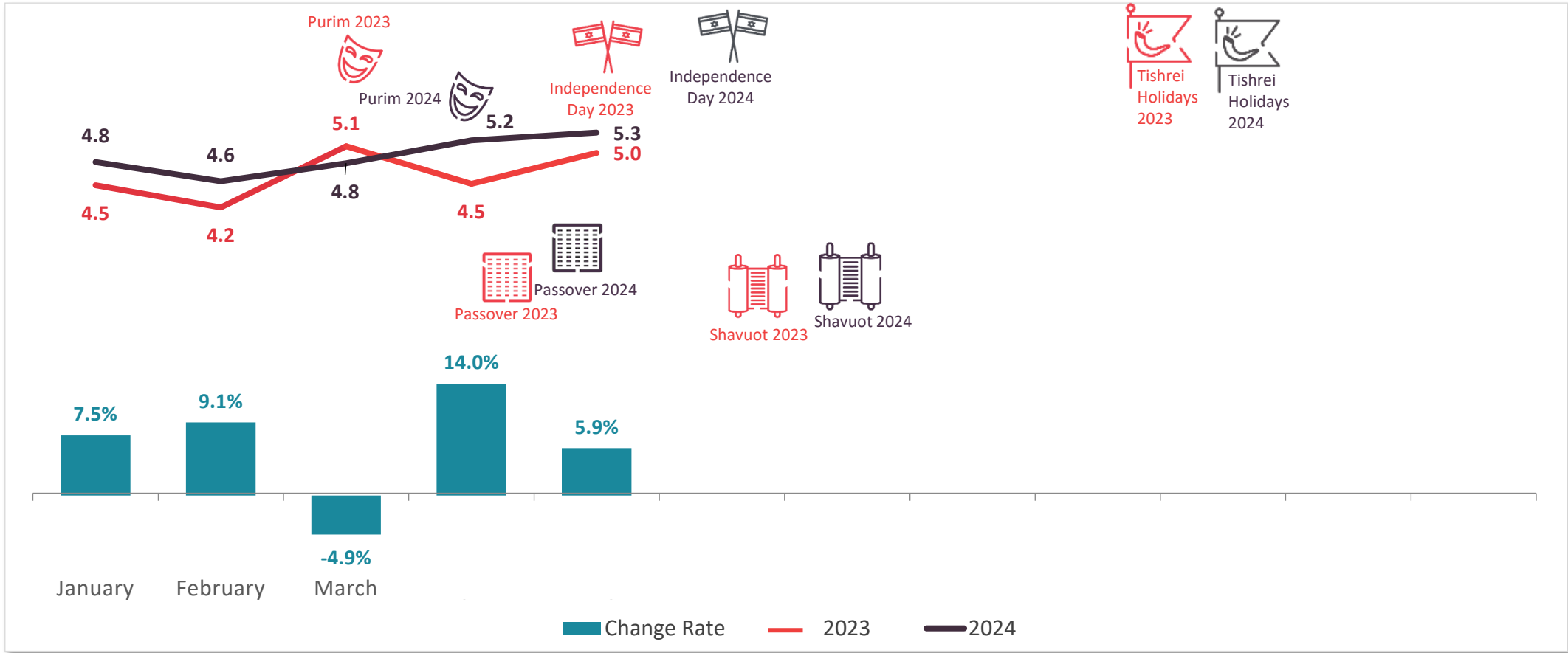
- 🏠 StoreNext's price index presents an increase of 4.6 points in current YTD compared to previous YTD
- 🏠 Compared to May 2023 the Price index show a 6.3 point rise, and compared to April the index rises in 1.7 points



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

Monthly Sales Trend

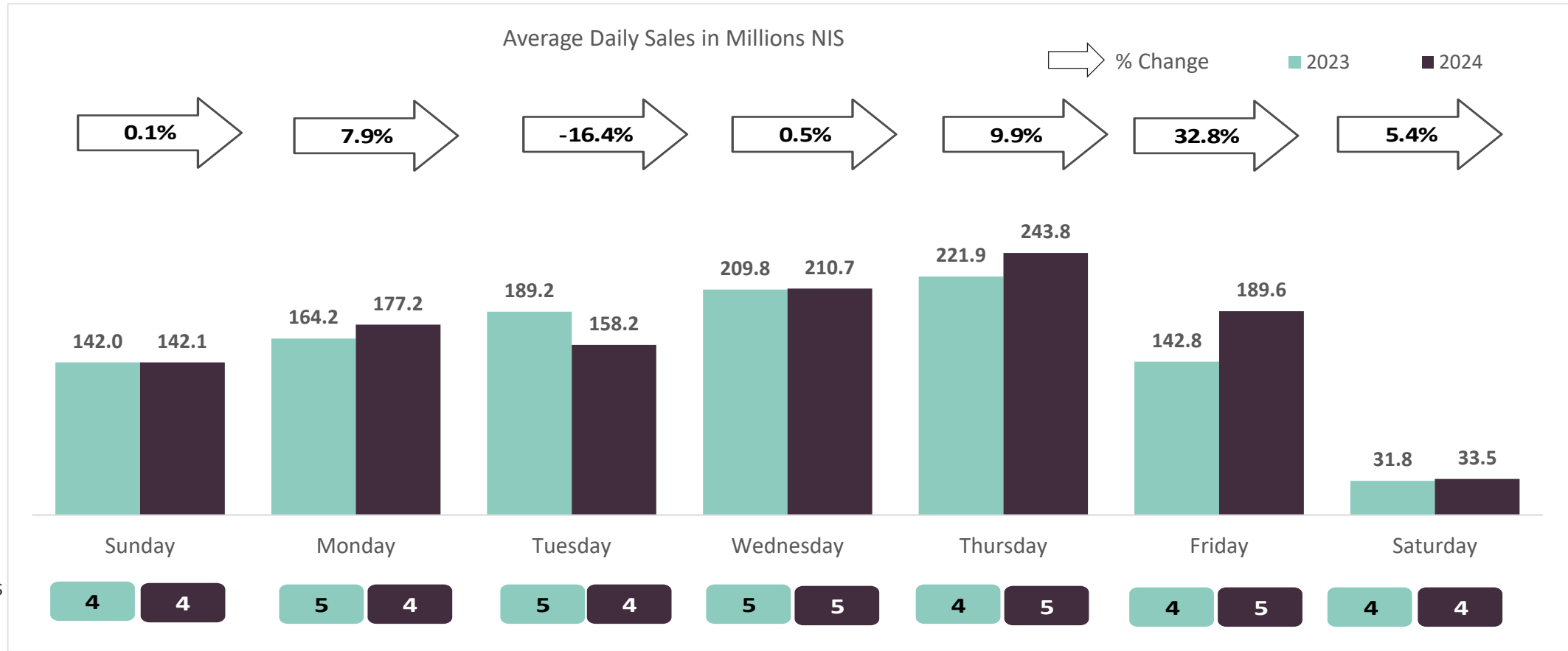
- FMCG sales decreased by 6.0% this May compared to May last year and stands at 5.3 billion NIS, an increase of 295 million NIS
- The rise this May comes despite a change in Independence Day timing and continuing price rises compared to parallel period last year



* FMCG Value Sales, Billion NIS

Sale By Days

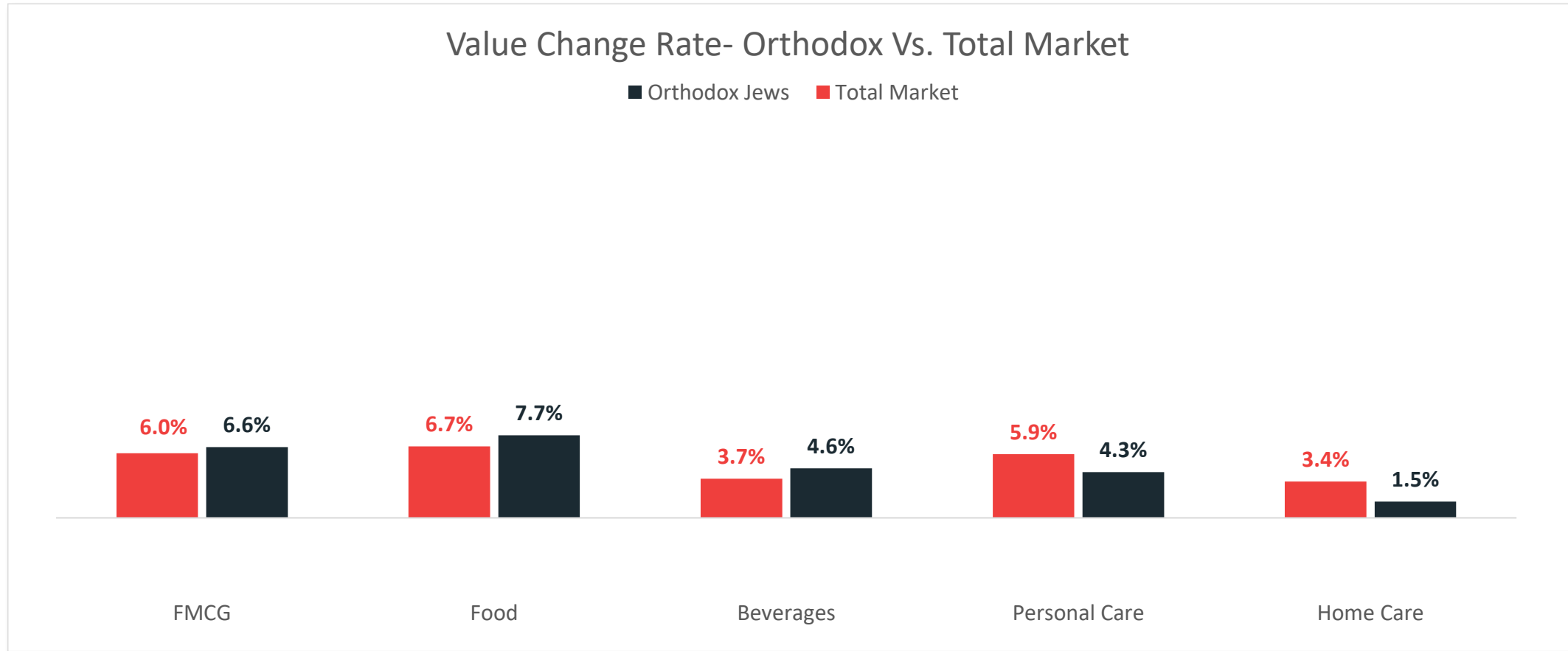
- Monthly rate shows an increase and stands at 6.0%, and excluding difference in sale days there is an increase of 4.0%
- Most of the growth in May is due to price increases compared to the same period last year, another addition to the growth is the addition of two strong sales days (Thursday and Friday) compared to May last year



* 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

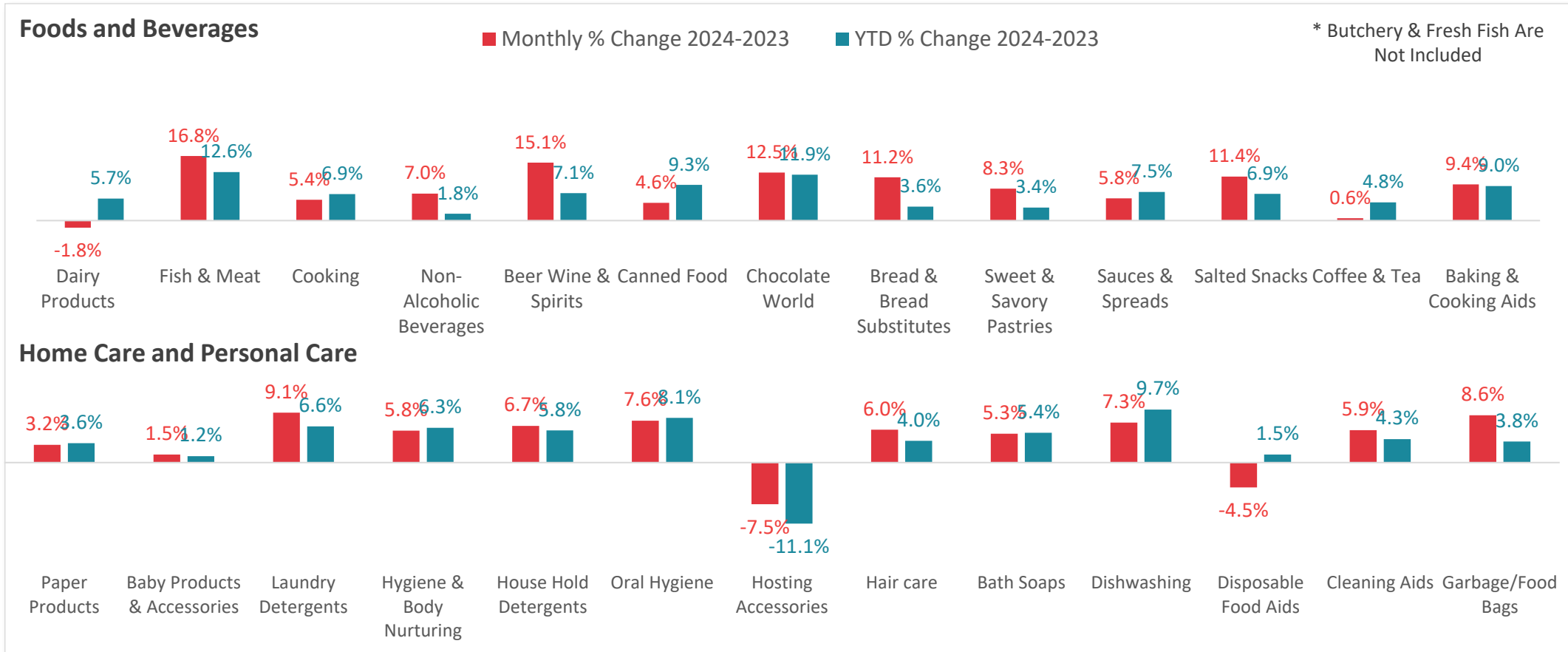
- 📌 The Orthodox Jews sector is over performing compared to total market due to a significant rise in Food
- 📌 It appears that the Home continues the drop that started in April



*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

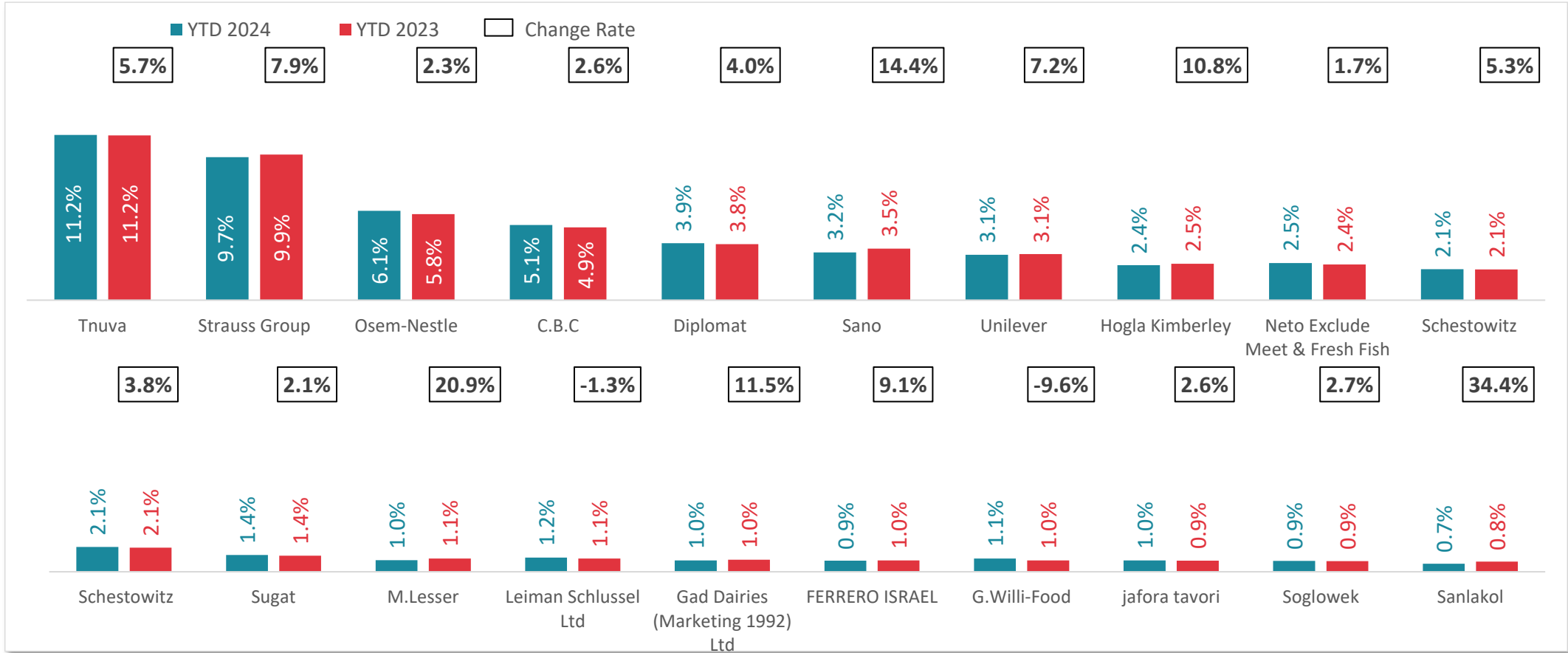
- May shows an increase in Fish & Meat, Beer Wine & Spirits, Chocolate World compared to May last year, most of the growth is related to the timing of Independence Day that took place last year at the end of April
- Growing Fields this YTD- Fish & Meat, Chocolate World, Dishwashing, Baking & Cooking Aids



Market Share and Suppliers' Growth



- Top 20's SOM reaching 60.5% this May, stagnant compared to May last year
- Top 10's SOM stands at 49.2% this May stagnant compared to previous May last year

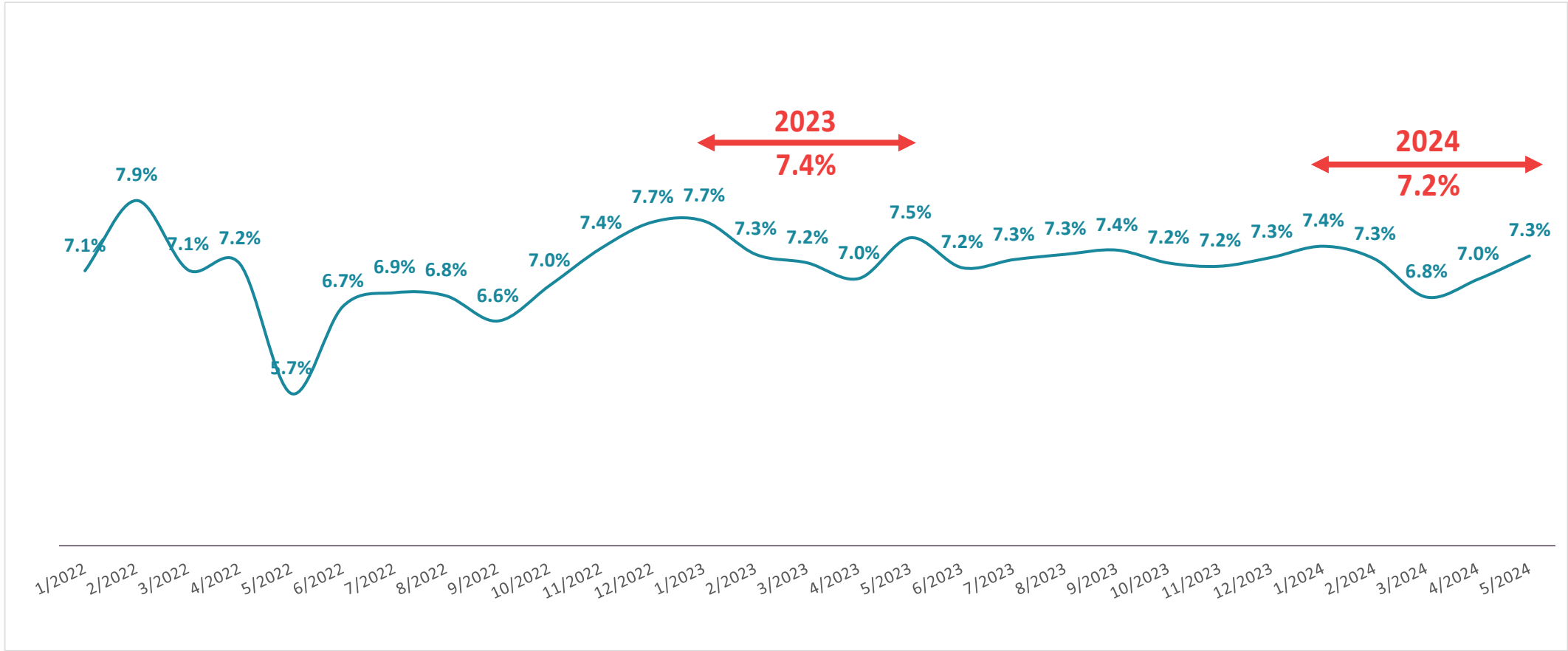


* Value Shares (FMCG Market- Excluding Butchers, Bakery, Fruits and Vegetables and Cigarette data)

Private Label Market Share - FMCG Market



Private Label share records a decrease of 0.2 market share points This YTD compared to parallel period in 2023. However, Compared to May 2023, May 2024 shows a decrease of 0.2 points and compared to April 2024 PL market share rises in 0.3 points

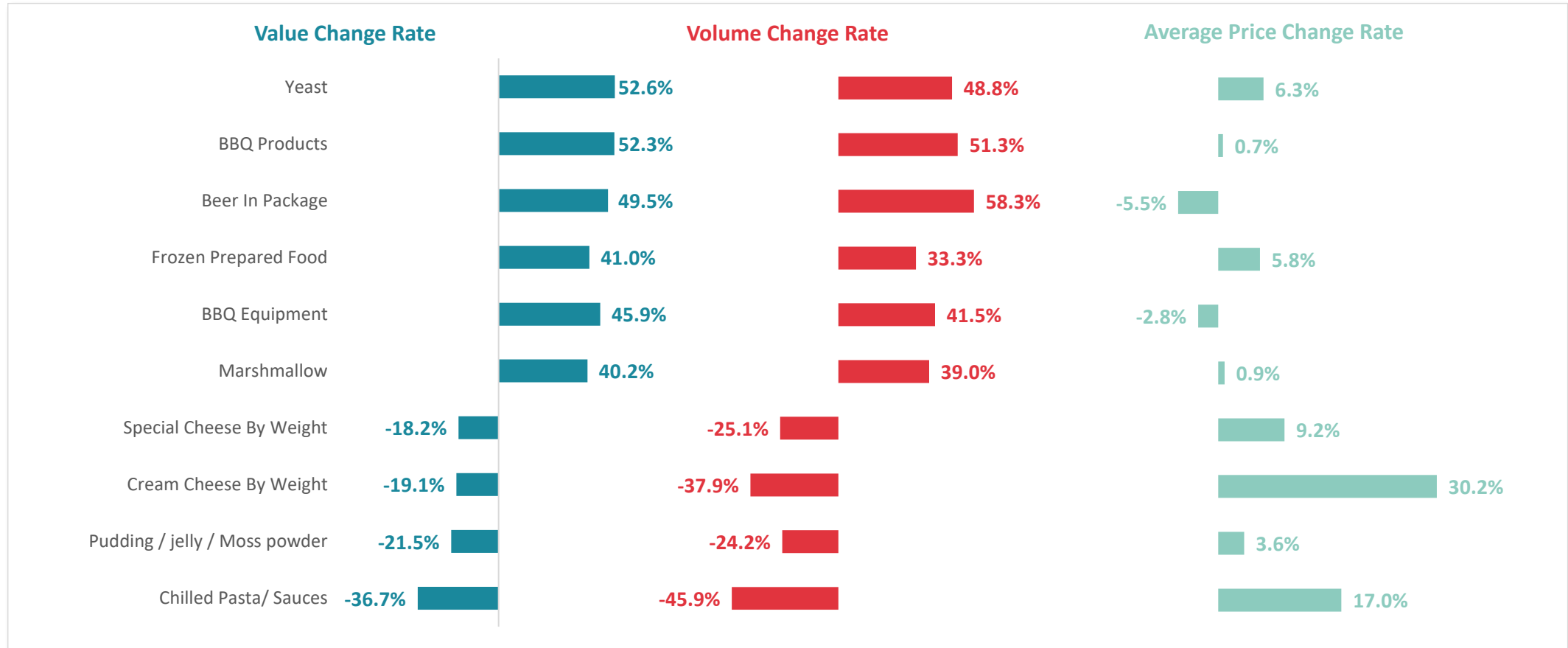


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Rising / Descending Categories – Current Month TY vs LY

🔄 Among the growing categories – Yeast, BBQ Products, Beer In Package compared to May 2023

🔄 Among the declining categories – Pudding / jelly / Moss powder, Cream Cheese by weight, Special Cheese by Weight due to the timing of Shavuot holiday, that took place last year at the end of May and this year in the middle of June



Thank You!



StoreNext

Looking Forward