

# CONVENIENCE & GAS

QUARTERLY REPORT  
CANADA Q1 2017

STRICTLY CONFIDENTIAL AND PROPRIETARY INFORMATION OF THE NIELSEN COMPANY.  
NOT TO BE COPIED OR REDISTRIBUTED

# CONSUMPTION IN THE FMCG INDUSTRY IS STILL CHALLENGED FOR GROWTH

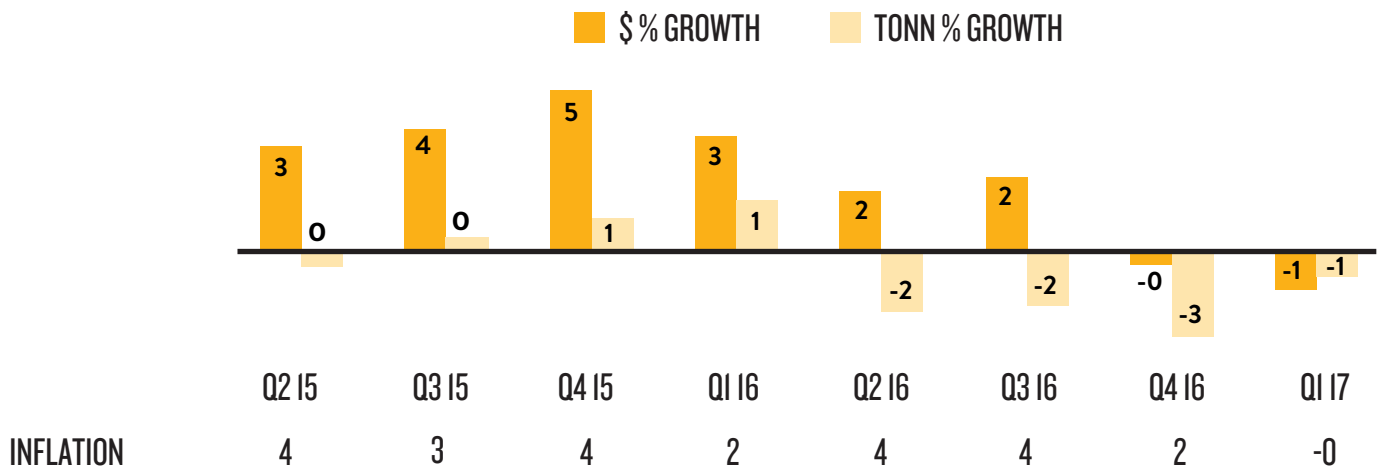
## INDUSTRY PERFORMANCE



	SALES VOLUME (BILLIONS)	\$ % GROWTH	TONN % GROWTH	INFLATION
LATEST 52 WEEKS	\$5,964.9	+1	-2	3
LATEST 12 WEEKS	\$1,240.0	-1	-1	-0

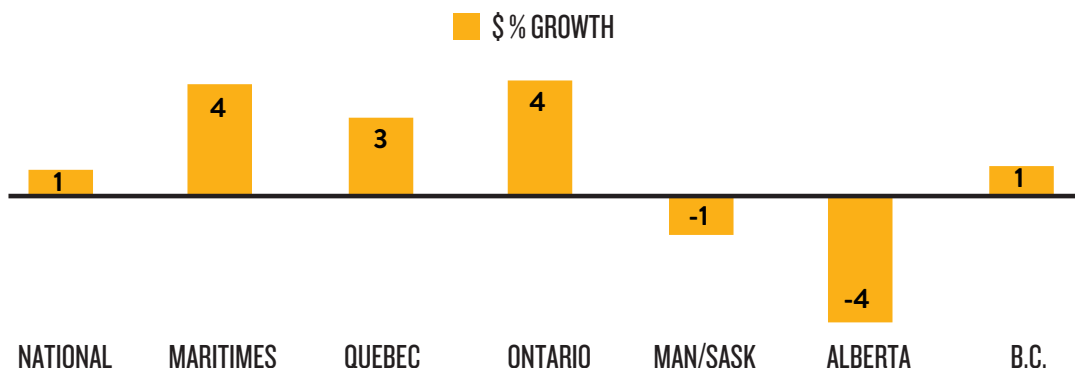
## BOTH DOLLARS AND VOLUME POST DECLINES IN Q1

### NATIONAL FMCG CONSUMPTION TRENDS



## MOST REGIONS FUEL DOLLAR GROWTH; PRAIRIES LAG NATIONAL PERFORMANCE








### REGIONAL FMCG PERFORMANCE – LATEST 52 WEEKS



Source: Nielsen, Convenience Track, National Convenience and Gas Banners, period ending April 01, 2017  
Total Tracked Sales excluding Fresh Random Weight

## SUB-DEPARTMENT PERFORMANCE

### TOTAL C&G TRACKED SALES

	LATEST 12 WEEKS			LATEST 52 WEEKS		
	\$ (000'S)	\$ SHARE	\$ % GROWTH	\$ (000'S)	\$ SHARE	\$ % GROWTH
TOTAL TRACKED SALES	1,240,001.0	100.0%	-1	5,964,908.8	100.0%	1
 GENERAL MERCH	830,008.3	66.9%	-2	3,967,477.9	66.5%	2
 COLD BEVERAGES	136,042.6	11.0%	-0	710,136.0	11.9%	-2
 CONFECTIONERY	69,196.1	5.6%	6	301,277.1	5.1%	3
 SNACK	64,045.8	5.2%	-2	306,825.6	5.1%	-2
 ALCOHOLIC BEVERAGES	50,873.1	4.1%	2	260,926.4	4.4%	2
 REFRIG/DAIRY	44,487.2	3.6%	2	198,490.0	3.3%	-2
 OTC	14,144.8	1.1%	1	62,022.9	1.0%	1

Source: Nielsen MarketTrack, National Convenience & Gas Banners, 52 and 12 Weeks ending April 01, 2017 - UPC items only.

Excludes Fresh Random Weight

Sub-departments reporting a dollar share of 1% or higher

# WHAT'S HOT AND WHAT'S NOT IN CANADIAN FMCG

A LOOK AT THE TOP 10 FASTEST GROWING AND SHARPEST DECLINING CATEGORIES IN THE LATEST 52 WEEKS  
(ANNUAL SALES >\$2 MILLION)

WHAT'S HOT			WHAT'S NOT		
CATEGORY	\$% GROWTH	VOL % GROWTH*	CATEGORY	\$% GROWTH	VOL % GROWTH*
RTD ICED TEA CANS	23	7	ANTISMOKING PRODUCTS	-44	-31
ENERGY & NUTRITION PRODUCTS	12	3	CANDIED SNACK FOODS	-24	-18
NATURAL CHEESE - NON DELI	11	10	FROZEN DINNERS & ENTREES	-19	-47
CARBONATED WATER	9	7	INSTANT BREAKFASTS	-18	-12
MILKSHAKES & EGGNOGS	8	12	LUNCH KITS	-15	-18
CANDY CONFECTIONS	7	3	CHEWING TOBACCO	-11	-13
ICE CREAM & RELATED PRODUCTS	7	4	COMMERCIAL ROLLS	-8	-9
COFFEE TYPE DRINKS	4	3	COMMERCIAL BREAD	-8	-8
CHOCOLATE	3	0	FROZEN PIZZA SNACKS	-6	-10
COOKIES	3	-6	COCONUT WATER	-6	-3

Source: Nielsen MarketTrack, National Convenience & Gas Banners, 52 Weeks Ending April 01, 2017

\* Volume measured in tonnage - unit of measure may vary by category

## ABOUT NIELSEN

Nielsen Holdings plc (NYSE: NLSN) is a global performance management company that provides a comprehensive understanding of what consumers watch and buy. Nielsen's Watch segment provides media and advertising clients with Nielsen Total Audience measurement services for all devices on which content — video, audio and text — is consumed. The Buy segment offers consumer packaged goods manufacturers and retailers the industry's only global view of retail performance measurement. By integrating information from its Watch and Buy segments and other data sources, Nielsen also provides its clients with analytics that help improve performance. Nielsen, an S&P 500 company, has operations in over 100 countries, covering more than 90% of the world's population. For more information, visit [www.nielsen.com](http://www.nielsen.com).





nielsen  
.....