

# CONVENIENCE & GAS

QUARTERLY REPORT  
CANADA Q3 2017

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# CONSUMPTION IN THE FMCG INDUSTRY IS STILL STRUGGLING FOR GROWTH

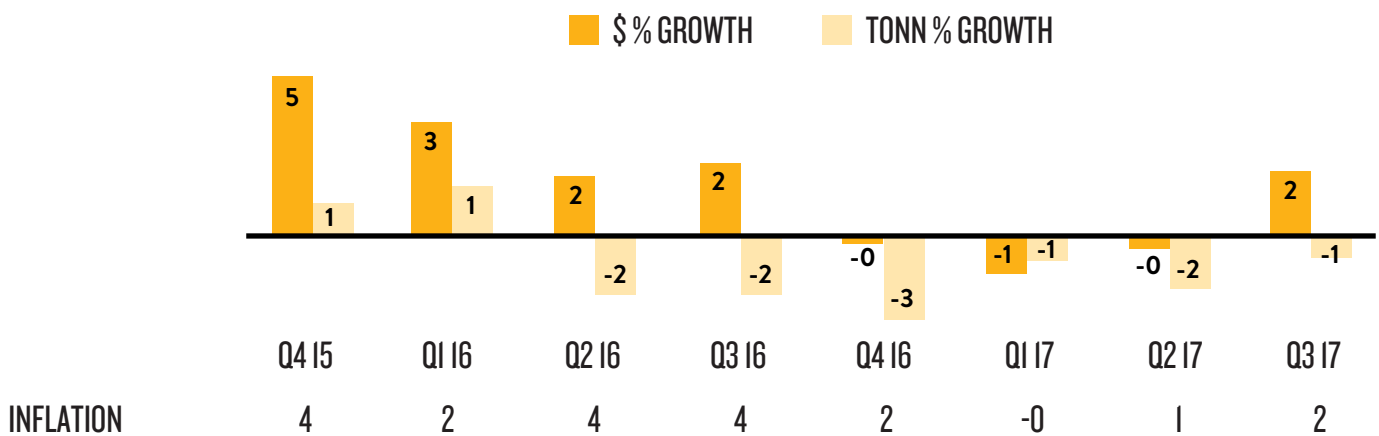
## INDUSTRY PERFORMANCE



	SALES VOLUME (BILLIONS)	\$ % GROWTH	TONN % GROWTH	INFLATION
LATEST 52 WEEKS	\$5,982.2	+0	-2	2
LATEST 12 WEEKS	\$1,552.6	+2	-1	2

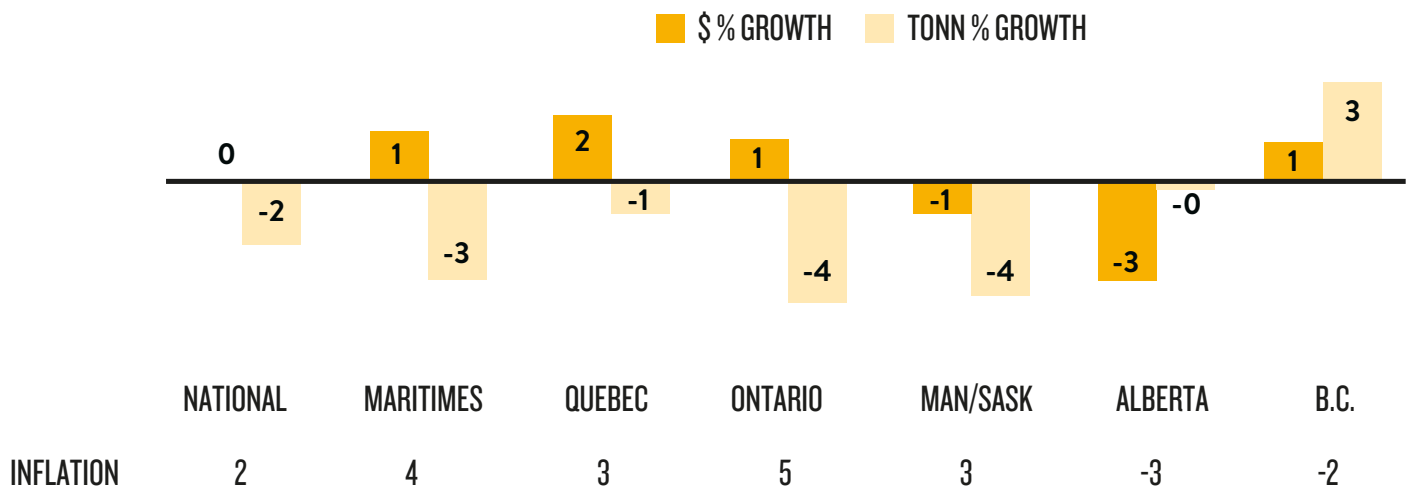
## INFLATION CONTINUES TO TREND UP IN Q3

### NATIONAL FMCG CONSUMPTION TRENDS



## QUEBEC TAKES THE LEAD IN REGIONAL GROWTH; PRAIRIES LAG NATIONAL PERFORMANCE








### REGIONAL FMCG PERFORMANCE – LATEST 52 WEEKS



Source: Nielsen, Convenience Track, National Convenience and Gas Banners, period ending September 16, 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
<b>TOTAL TRACKED SALES</b>	1,552,618.7	100.0%	2	5,982,171.2	100.0%	0
 <b>GENERAL MERCH</b>	1,017,372.7	65.5%	2	3,975,717.9	66.5%	-0
 <b>COLD BEVERAGES</b>	200,486.0	12.9%	-1	706,855.9	11.8%	-1
 <b>SNACK</b>	80,944.1	5.2%	3	310,039.6	5.2%	-0
 <b>CONFECTIONERY</b>	76,712.0	4.9%	4	305,648.6	5.1%	3
 <b>ALCOHOLIC BEVERAGES</b>	69,709.2	4.5%	1	261,811.9	4.4%	1
 <b>REFRIG/DAIRY</b>	47,461.2	3.1%	-1	197,701.4	3.3%	-1
 <b>FROZEN FOODS</b>	21,557.3	1.4%	5	65,854.6	1.1%	2

Source: Nielsen MarketTrack, National Convenience & Gas Banners, 52 and 12 Weeks ending September 16, 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*
CARBONATED WATER	35	35	ANTISMOKING PRODUCTS	-45	-37
ICE CREAM	14	6	INSTANT BREAKFASTS	-17	-12
NATURAL CHEESE - NON DELI	9	7	CANDIED SNACK FOODS	-16	-13
CANDY CONFECTIONS	8	3	NUTRITIOUS PORTABLE FOODS	-13	-14
ENERGY & NUTRITION	8	2	FROZEN PIZZA SNACKS	-7	-13
MILKSHAKES & EGGNOGS	8	14	CHEWING TOBACCO	-6	-7
BATHROOM TISSUE	7	-3	LUNCH KITS	-6	-8
COOKIES	6	1	COFFEE TYPE DRINKS	-6	-8
COMMERCIAL BAKED DESSERTS	4	4	COMMERCIAL BREAD	-6	-4
MEAT STICKS & BEEF JERKY	4	10	REFRIGERATED JUICES & DRINKS	-5	-13

Source: Nielsen MarketTrack, National Convenience & Gas Banners, 52 Weeks Ending September 16, 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).





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