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CONVENIENCE & GAS

QUARTERLY REPORT
CANADA Q4 2016

THE FMCG INDUSTRY (FAST-MOVING CONSUMER GOODS) HAS BEEN CHALLENGED BY DECREASED CONSUMPTION IN 2016

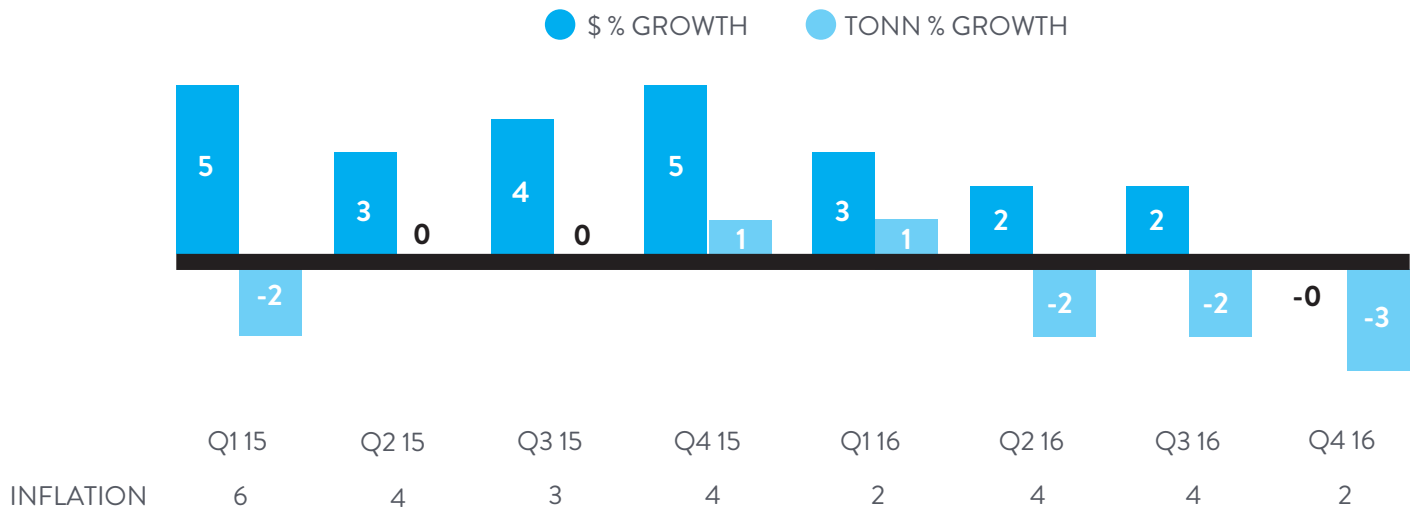


INDUSTRY PERFORMANCE

	SALES VOLUME (MILLIONS)	\$ % GROWTH	UNITS % GROWTH	INFLATION
Latest 52 Weeks	\$5,669.0	+2	-3	5
Latest 12 Weeks	\$1,230.3	-0	-3	2

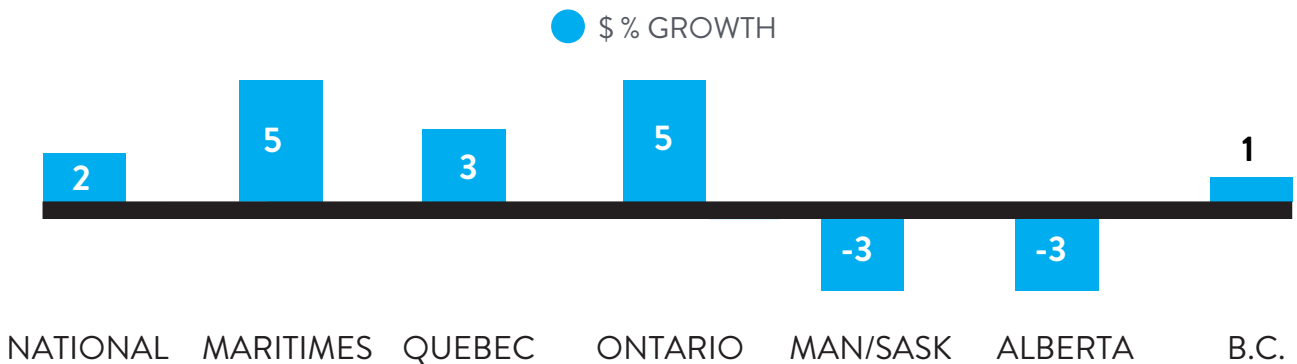
Q4 2016 STRUGGLED FOR GROWTH

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 January 07, 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	1,230,305.5	100.0%	0	5,668,971.0	100.0%	2
 GENERAL MERCH	833,449.6	67.7%	0	3,785,934.5	66.8%	3
 COLD BEVERAGES	131,834.1	10.7%	-3	665,011.9	11.7%	-3
 SNACK	61,386.9	5.0%	-3	287,151.4	5.1%	-2
 CONFECTIONERY	58,515.7	4.8%	3	277,866.4	4.9%	2
 REFRIG/DAIRY	44,542.3	3.6%	-3	191,833.5	3.4%	-4
 OTC	13,724.7	1.1%	1	58,091.5	1.0%	2

Source: Nielsen MarketTrack, National Convenience & Gas Banners, 52 and 12 Weeks ending January 07, 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	19	5	Antismoking Products	-43	-25
Energy & Nutrition Products	14	9	Frozen Dinners & Entrees	-27	-55
Natural Cheese - Non Deli	10	9	Instant Breakfasts	-19	-13
Carbonated Water	9	7	Lunch Kits	-17	-20
Milkshakes & Egnogs	7	8	Chewing Tobacco	-10	-12
Coffee Type Drinks	7	6	Candied Snack Foods	-9	-7
Cookies	4	-5	Coconut Water	-9	-2
Cigarettes	4	-1	Commercial Bread	-8	-9
Ice Cream & Related Products	4	5	Commercial Rolls	-7	-8
Candy Confections	4	-9	Milk	-6	-5

Source: Nielsen MarketTrack, National Convenience & Gas Banners, 52 Weeks Ending January 07, 2017

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

CONSUMER CONFIDENCE INDEX

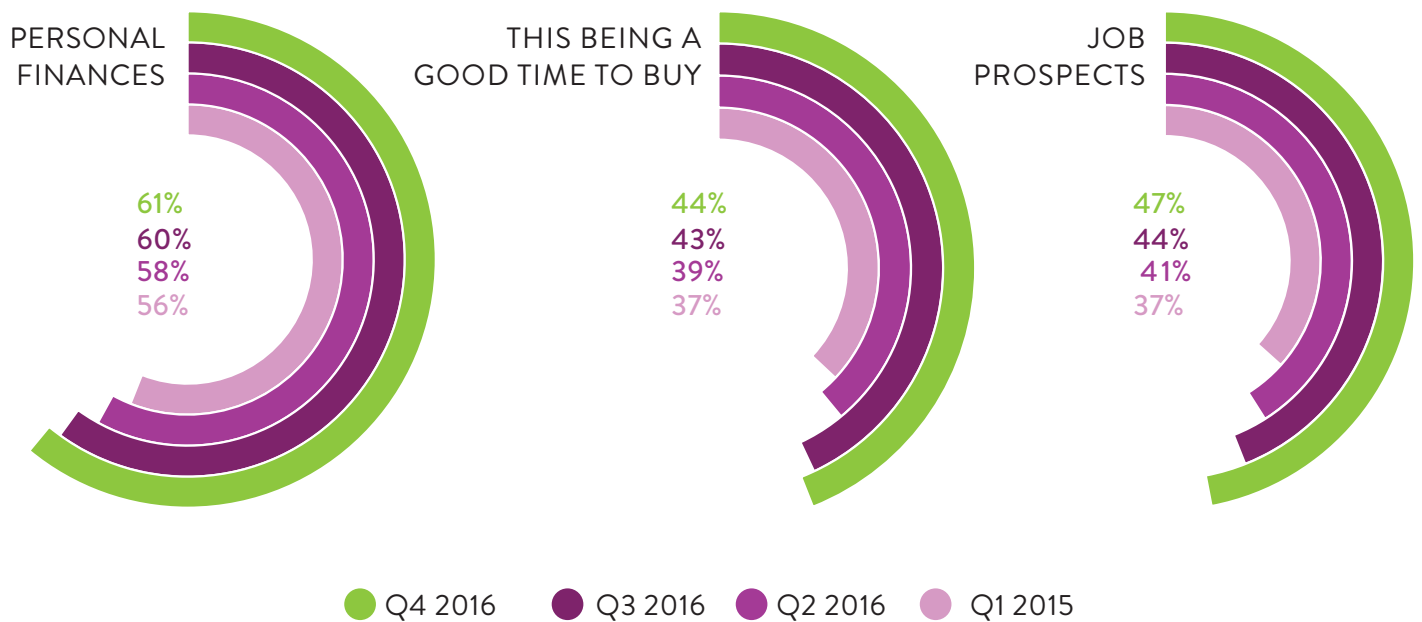
CONSUMERS ENTER 2017 ON A MORE OPTIMISTIC NOTE

CANADA



OPTIMISM RISES FOR PERSONAL FINANCES, BUYING INTENTIONS AND JOBS

GOOD/EXCELLENT



Source: Global Consumer Confidence Report, Q4 2016 - Canada

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 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.

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