



tasmanian
independent
retailers

September 2021 (Period 3-FY22)

IGA Monthly Update

SIW Purchases and Service Levels



Commercial in Confidence

IGA SIW Purchase Sales Performance Overview

September's SIW \$ purchases (sales) growth was encouraging. Sales were boosted by exceptional cigarette sales while non-cigarette categories (combined) growth is still holding up well. Promotion sales also remained strong throughout the period as Footy Finals kicked in a month earlier than last year.

Basic grocery categories and COVID high demand categories from last year continue to show a drop in demand. However, sales increases are being shown across confectionery, snacks, soft drinks, and frozen categories in September as you would expect for the Footy Finals promotions.

IGA members are finally buying up cigarettes again as their previous investment buy levels extinguish, and upcoming price rises are coming into play.

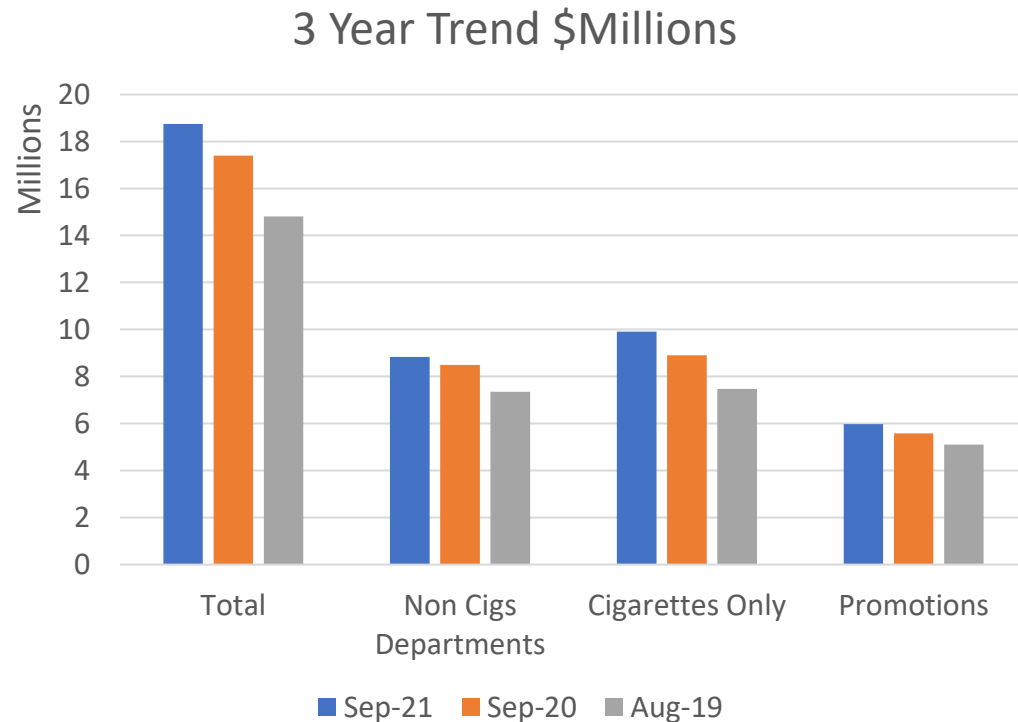
The two-year (Sept FY20 VS Sept FY22) sales growth comparison continues to show that market share is holding up.



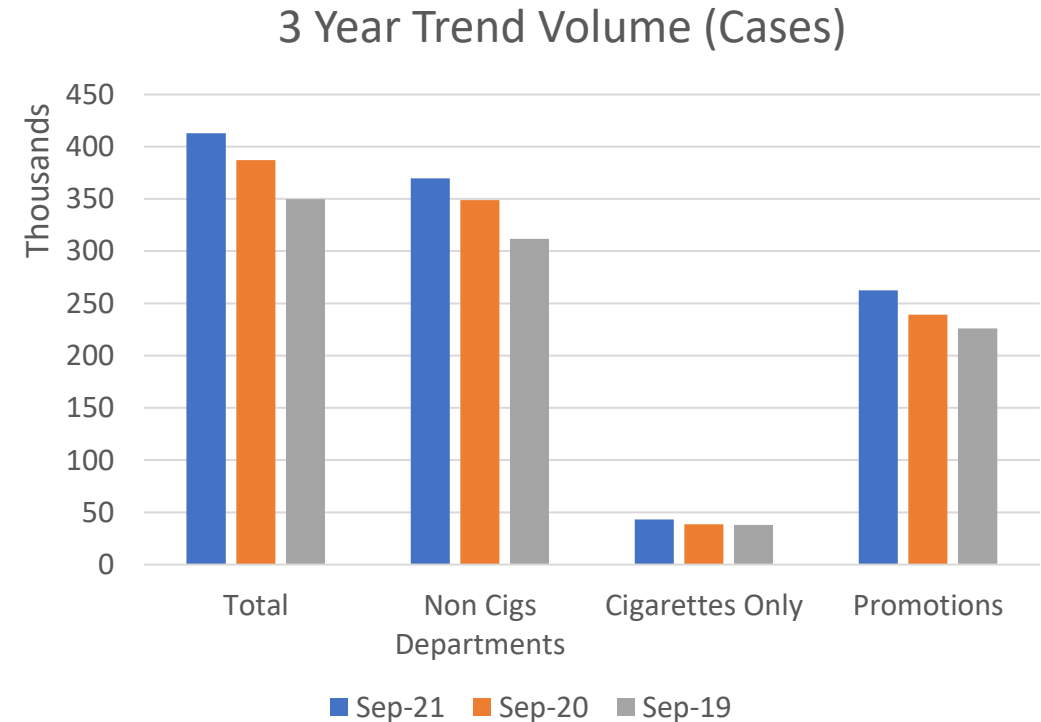
SIW Purchases – September 2021



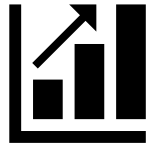
SIW Purchases - \$ Sales



SIW Purchases – Volume (Cases)



IGA September Highlights



SIW Performance

- SIW Group Purchases “Up” on 2020
 - Dollars **+7.78%**
 - Volume **+6.65%**
- SIW Group Purchases “Up” on 2019
 - Dollars **+26.52%**
 - Volume **+18.56%**
- SIW Service Levels have mixed results
 - Ambient **96.51%** vs 94.87% (LY)
 - Temp Control **94.74%** vs 95.09%
 - *Ongoing supply issues for Chilled suppliers due to Covid Impacts to manufacturing and supply chains*
- Sales outlook for October is promising with excellent early sales for upcoming Gigantic sale and Halloween events



Highlights – Promotions

- The Cigarette category turnaround in Sales and Volume will help meet SIW volume target.
 - Vs LY Sales **+11.34%** and Vol **+12.44%**
 - Vs 2019 Sales **+20.32%** and Vol **+13.78%**
- Promotional sales remain strong vs. last year
 - Sales **+ 7.19%**
 - Volume **+ 9.77%**
- Promotional GP% Up on Last Year
 - GP% **15.44** vs 15.23 (LY) *
- Promotional GP\$ delivered additional growth for September
 - YTD GP\$ Growth Diff **+\$478K**
 - YTD Growth **+13.96%**

* GP% is calculated from SIW invoices which assume all promotional purchases are sold at promotional retails for the entire time.

IGA SIW SERVICE LEVEL TREND



September 2021 (weeks 10-14)

Overall SIW
96.12%

“Up on last month but
expecting to come back
to last years levels in
October”

