



MARKET VIEW October 2023

Trends for the Greek FMCG environment



Study ID

01 METRICS

Value and Units Sales Trends:
Super/Hyper Markets FMCG

02 CHANNELS

Super/Hyper Markets

(Self-service retail stores with a central check-out area and at least 2 cash registers)

03 AREAS

Greece Mainland & Crete

04 PERIODS

YR 2022 vs YR 21

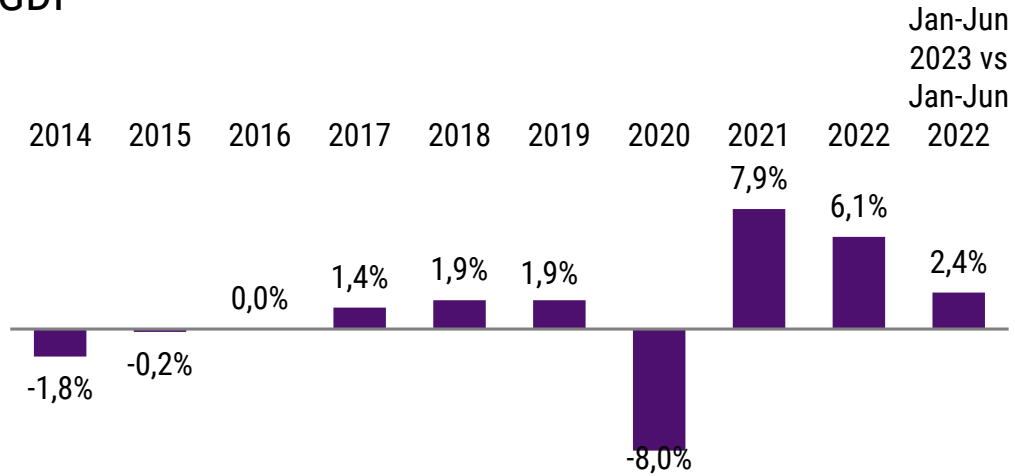
YTD October 2023 vs YTD October 2022

01

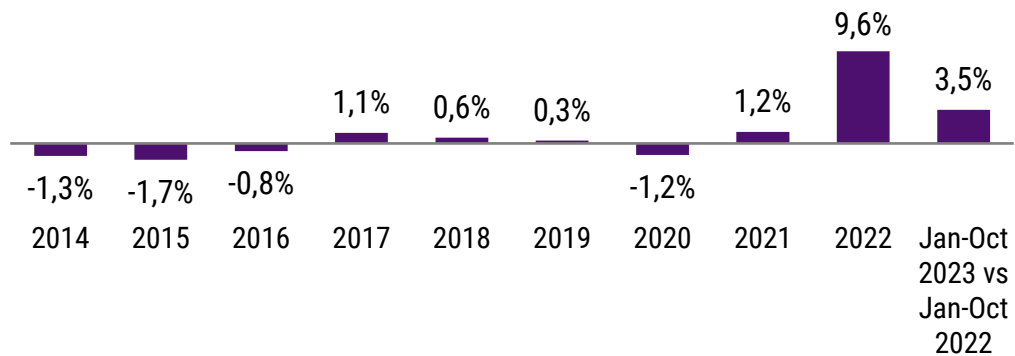
Greek Economy

Greek Economy

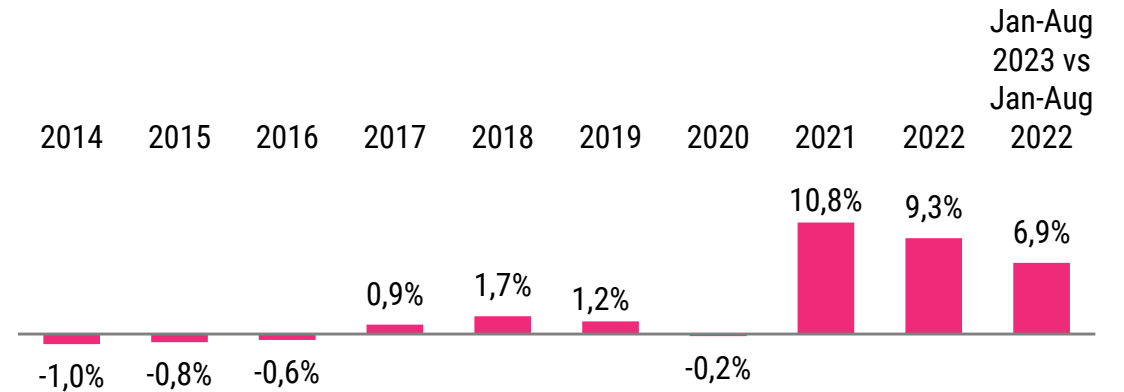
GDP



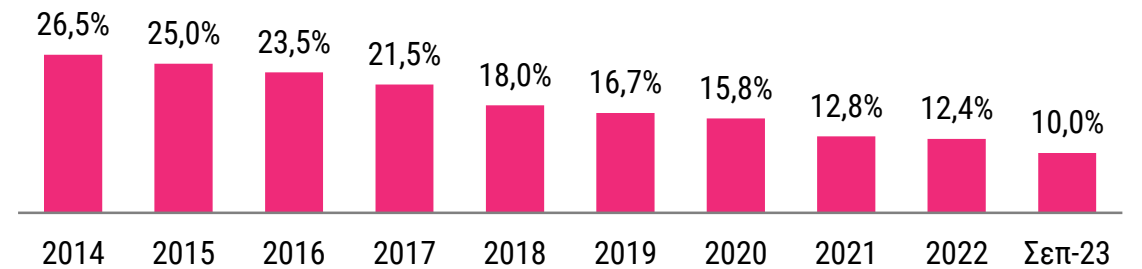
INFLATION RATE TREND



RETAIL TURNOVER INDEX (w.o AUTOMOTIVE FUEL)



UNEMPLOYMENT





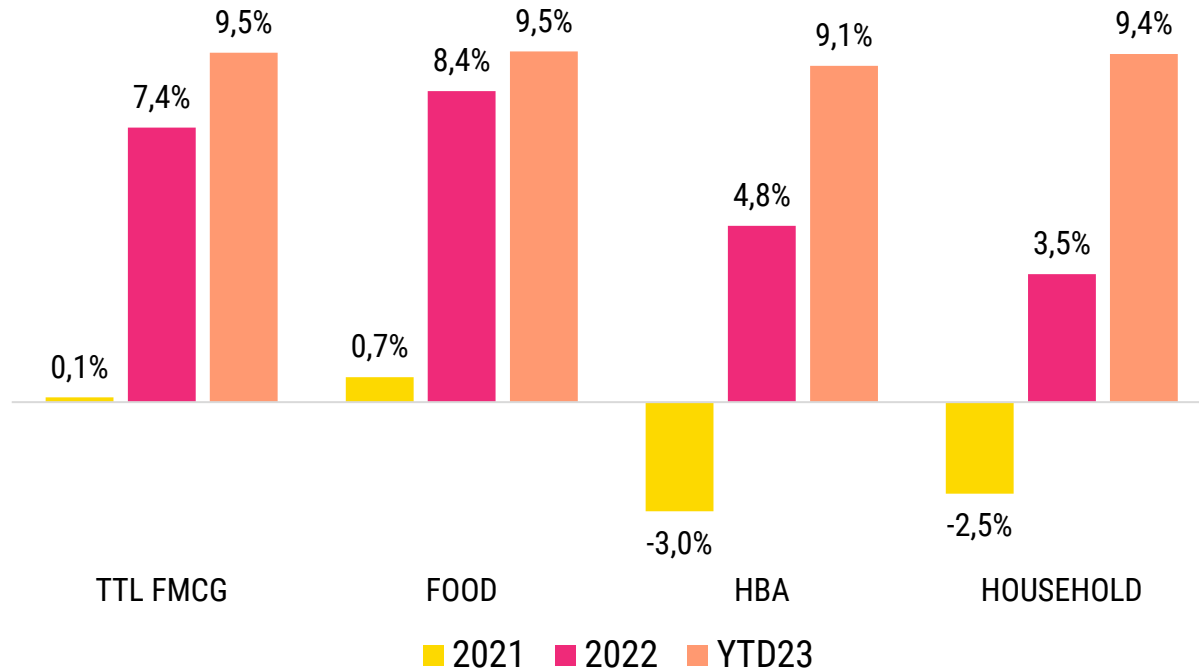
2022

Trends for FMCG Market

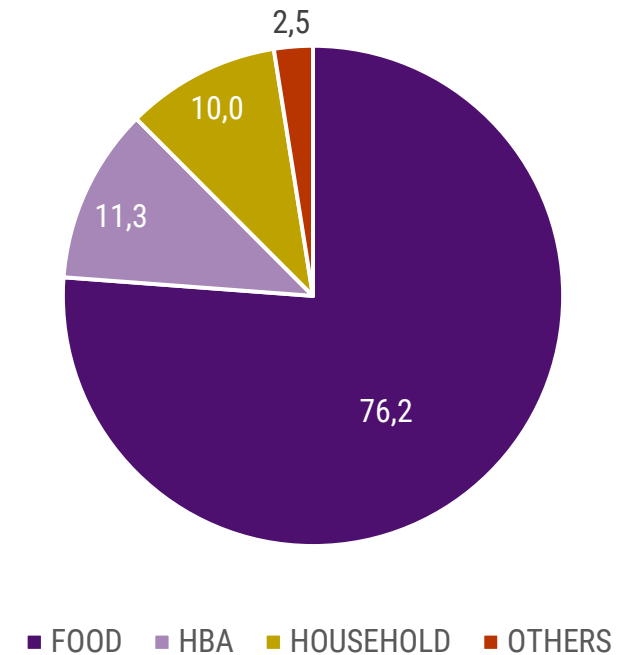
Fixed Barcodes

FMCG Value Sales Trend – YTD 23

Almost double digit growth for All 3 Categories (Food, HBA & Household) in YTD 23



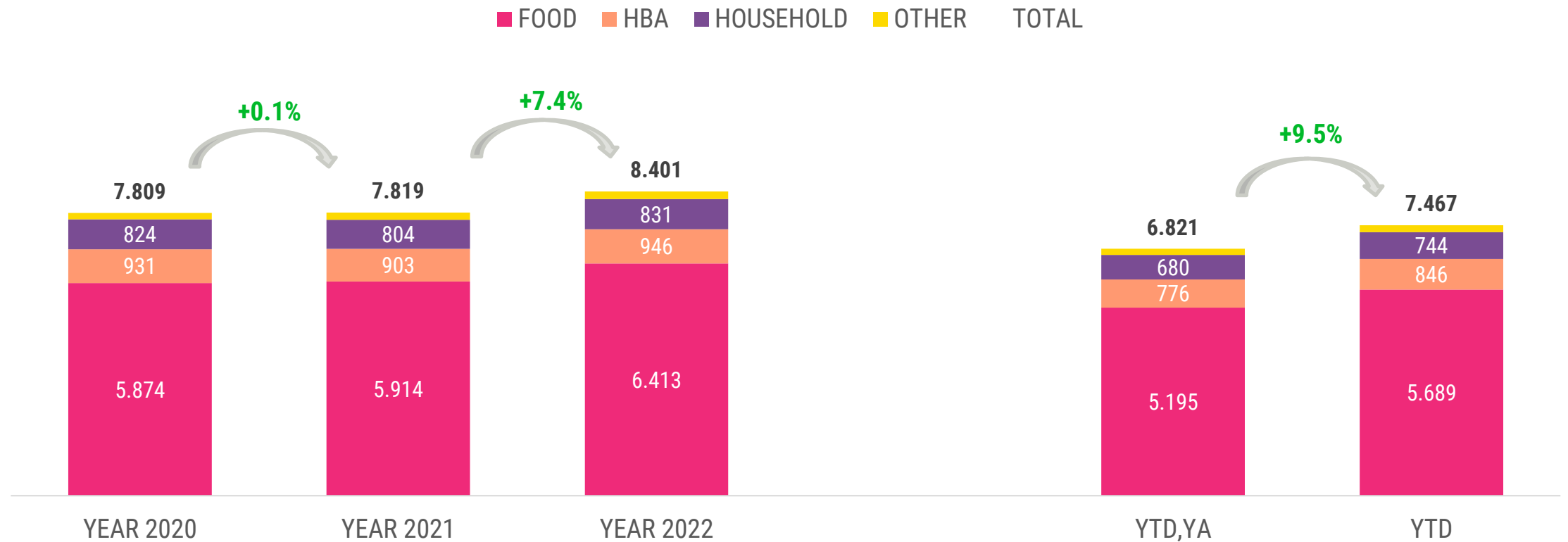
YTD Value Contribution



Source: Circana InfoScan, HM/SM, YTD October 23

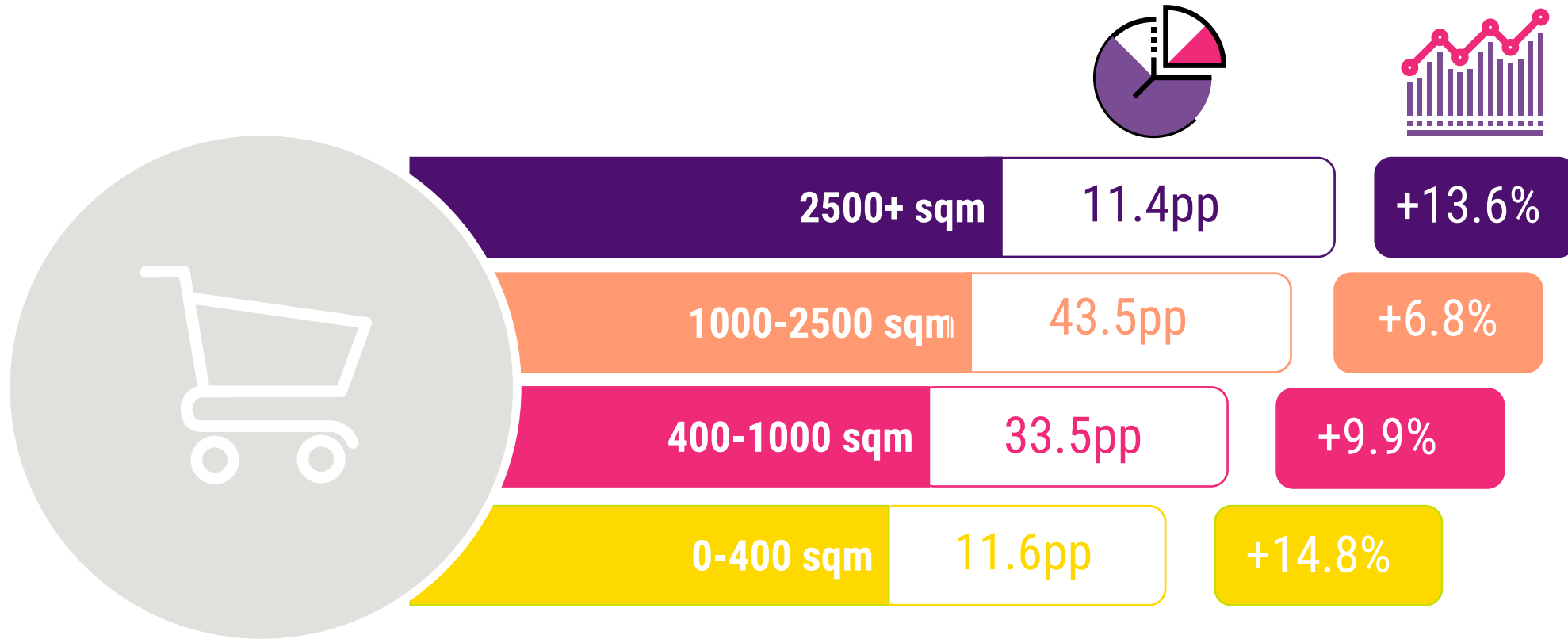
Total Greece Value Sales in million €

Total Value Sales of Year 2022 exceeded 8,4 billions



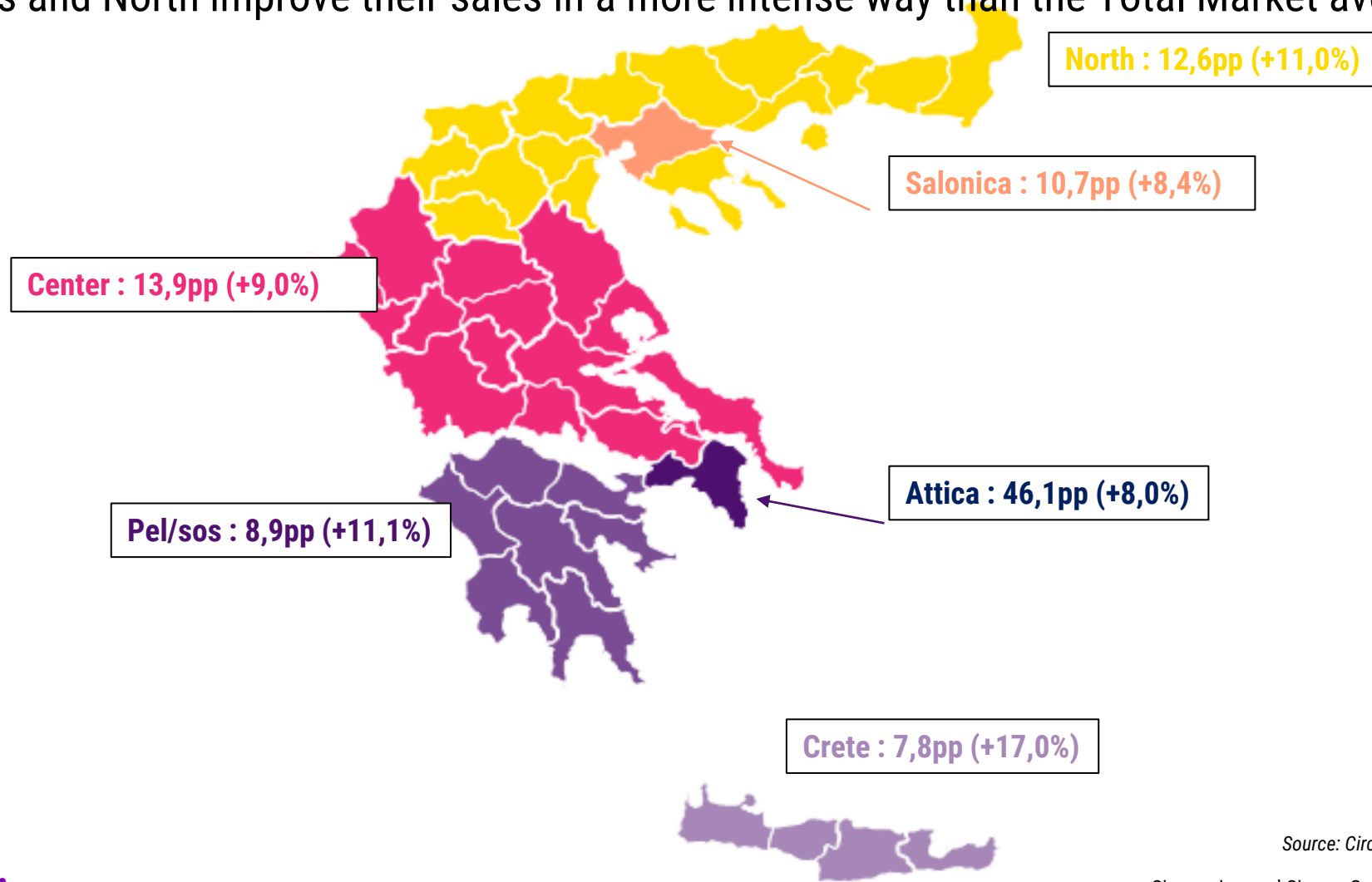
FMCG Value Sales Trends per Store Type

Small and Hyper SMs succeed the highest increase in YTD 23



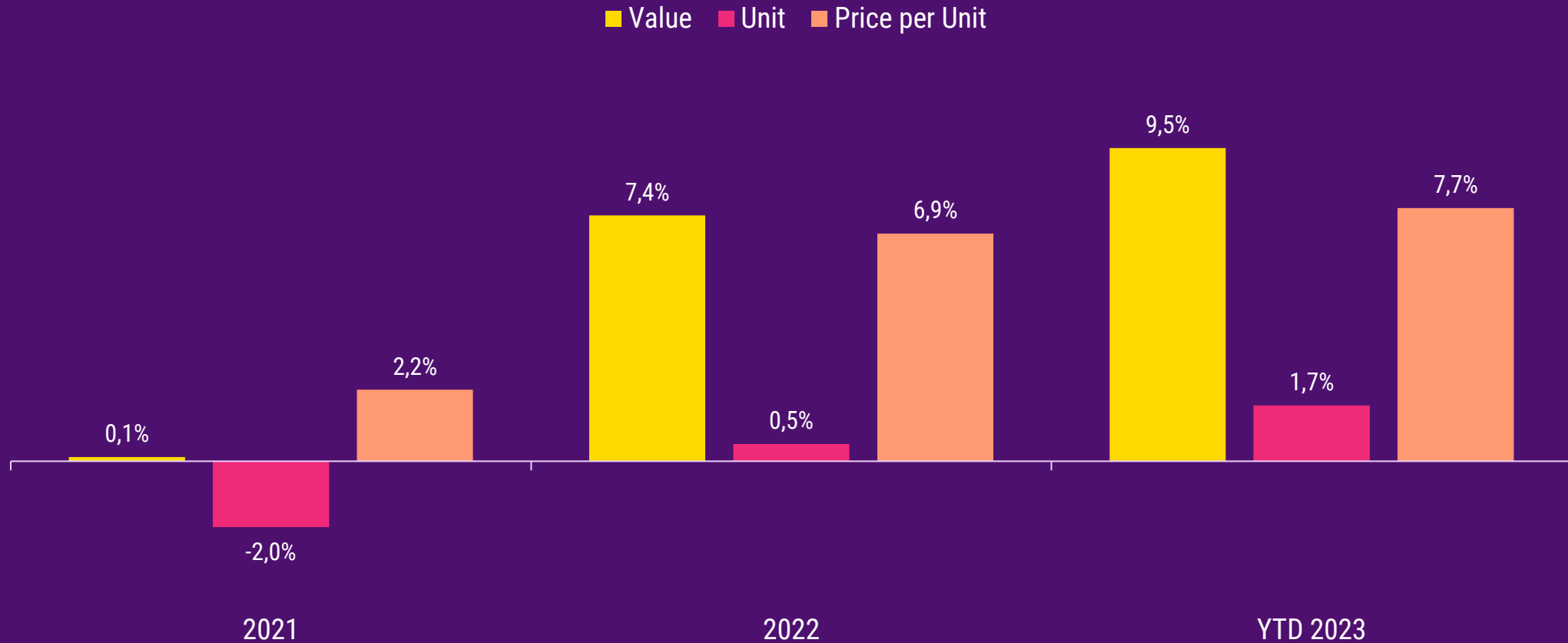
FMCG Value Sales Trends per Geo YTD 23

Crete, Pel/sos and North improve their sales in a more intense way than the Total Market average



FMCG Price Trends

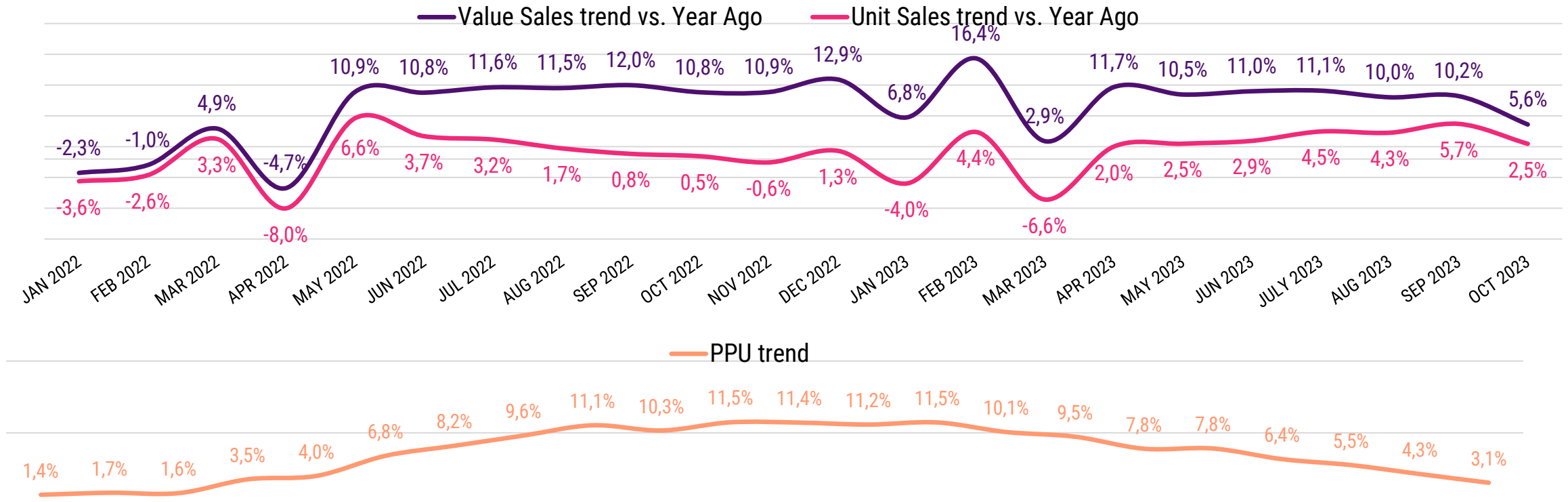
Increased prices in YTD 23 by 7,7%



FMCG Value and Unit Monthly Trends

Price increase for last month by 3,1%

YR 2021: +0.1%
YR 2022: +7.4%
YTD 2023: +9.5%



Source: Circana InfoScan, HM/SM, YTD October 23



03

Giga Categories Evolution

Giga Categories Value Sales Trend

Almost double digit growth for All 3 Categories in YTD 23

YTD 23



9.5%



9.1%



9.4%

Food

Health & Beauty

Household

2022



8.4%



4.8%



3.5%

Giga Categories Unit Sales Trend

Food and HBA are increasing their Unit Sales in YTD 23

YTD 23



1.8%



1.3%



-0.2%

Food

Health & Beauty

Household

2022



1.3%



-3.6%

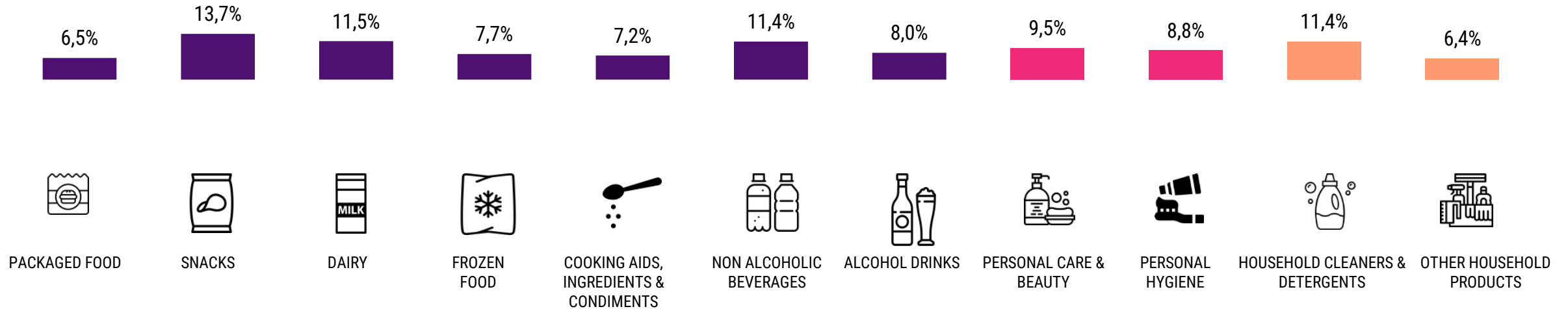


-4.2%

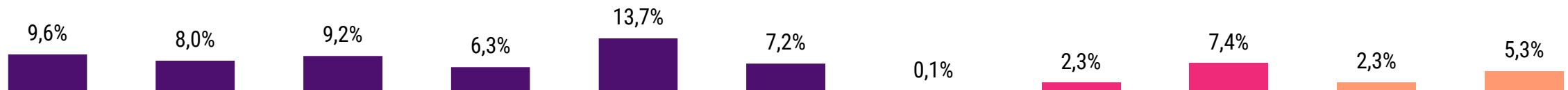
Categories Value Sales Trend YTD 23

Regarding Food Categories, Snacks, Dairy and Non Alcohol demonstrate the highest increase in YTD 23

Value Sales Trend YTD 23



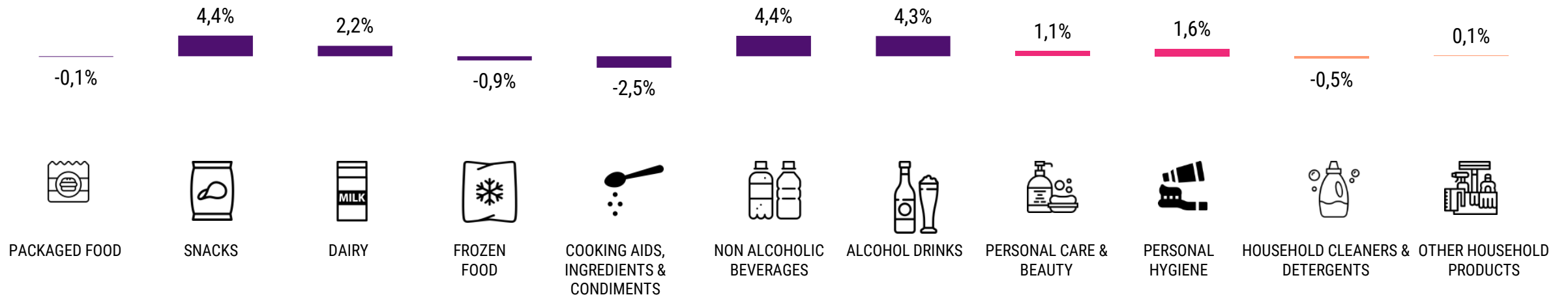
Value Sales Trend 2022



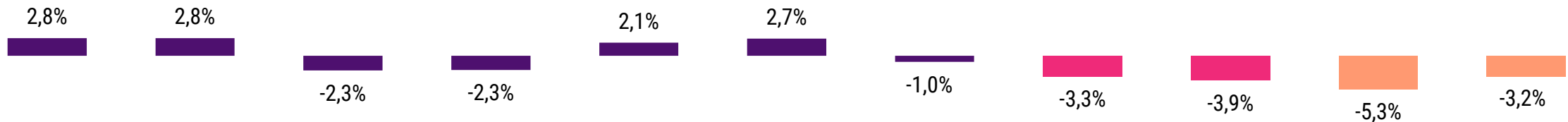
FMCG Unit Sales Trend YTD 23

Snacking, Non Alcohol and Alcohol are the champions in YTD 23 in terms of Units

Unit Sales Trend YTD 23



Unit Sales Trend 2022



Source: Circana InfoScan, HM/SM, YTD October 23

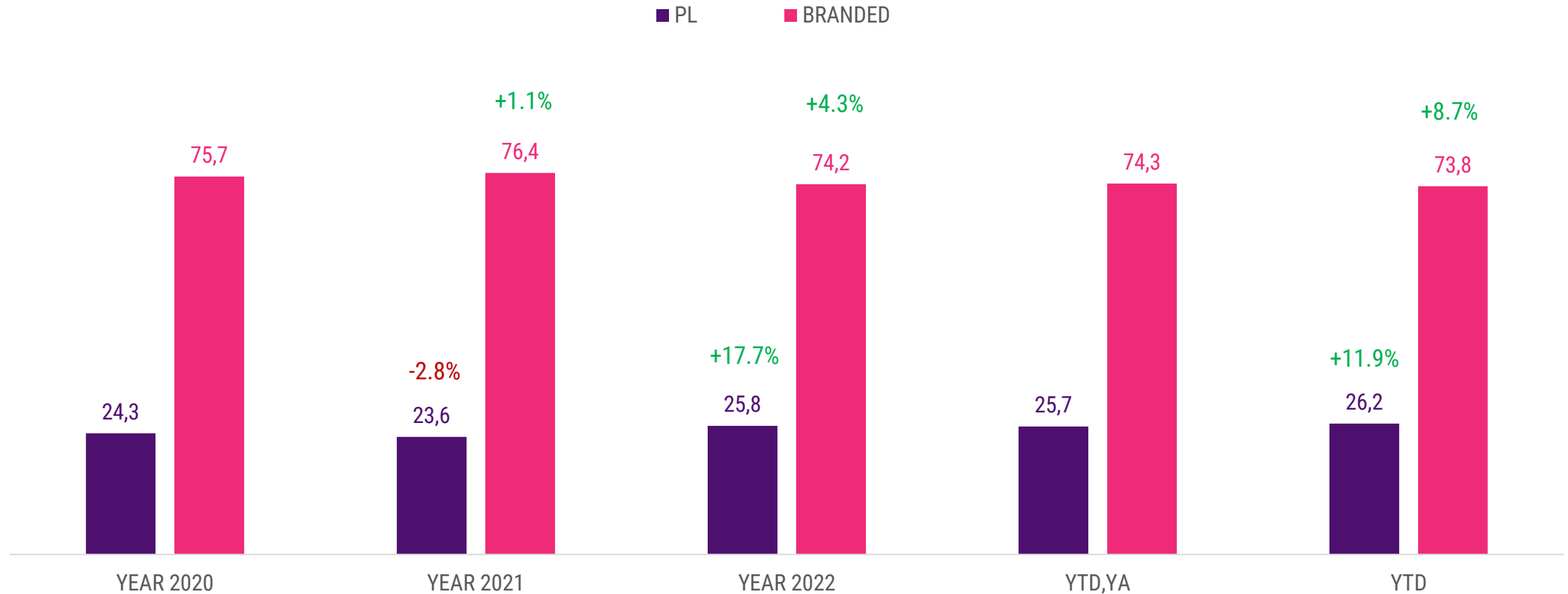
The background features a complex, abstract pattern of wavy, horizontal lines in shades of purple and orange, creating a sense of depth and movement. Overlaid on this pattern is a grid of small, glowing dots in various colors, including purple, orange, and yellow, which adds a digital or data-like aesthetic to the overall composition.

04

Evolution of Private Labels

PL and Branded Value Shares and Trends

Since 2020, PL increased its Contribution by 2p.p. Moreover in YTD 23 achieve double digit growth

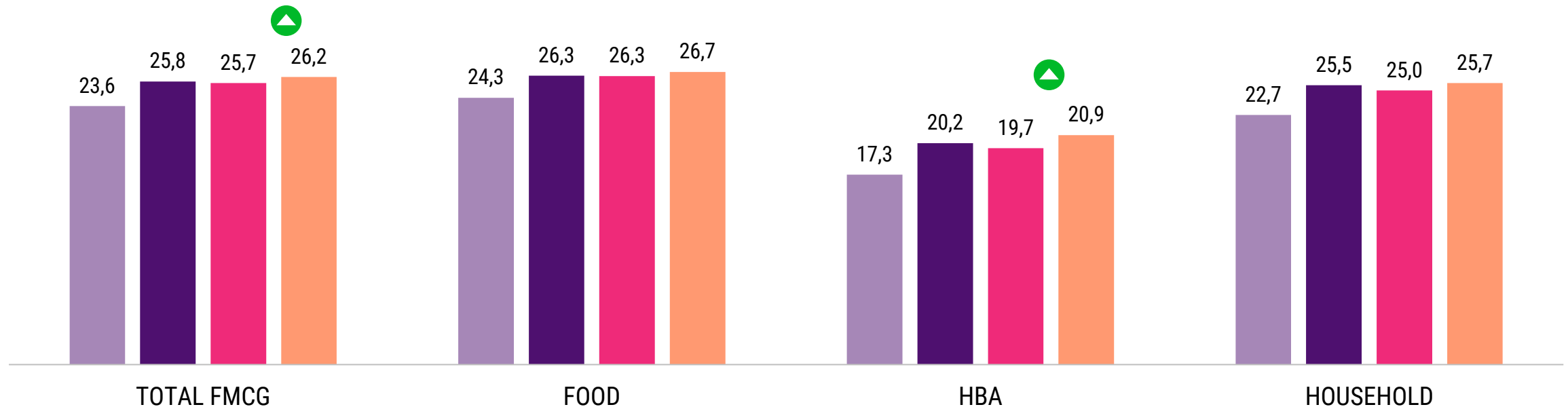


Source: Circana InfoScan, HM/SM, YTD October 23

PL Value Share per Giga Category

PL's share reports a significant increase in YR 2022 in all Giga categories and maintains momentum in YTD '23

■ YEAR 2021 ■ YEAR 2022 ■ YTD '22 ■ YTD '23

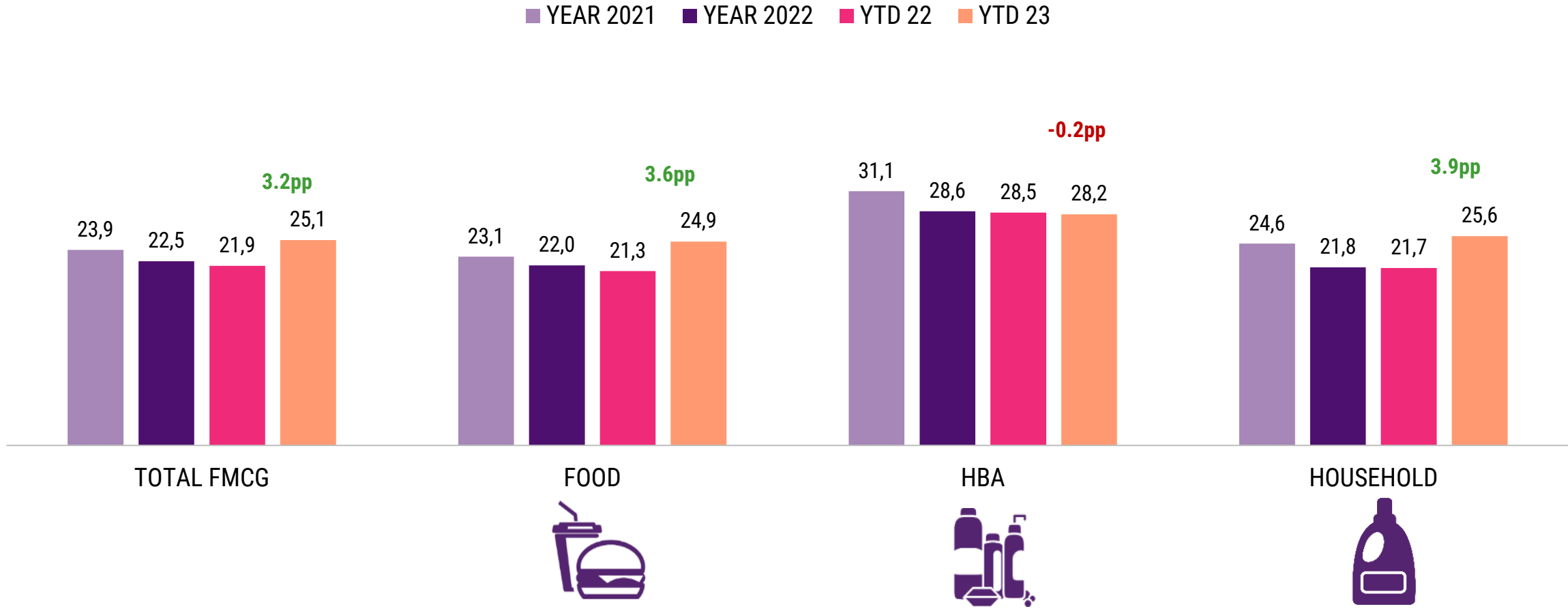


Q5

Price Trends
& Promo
Pressure

%Value Sales due to Temporary Price Reduction

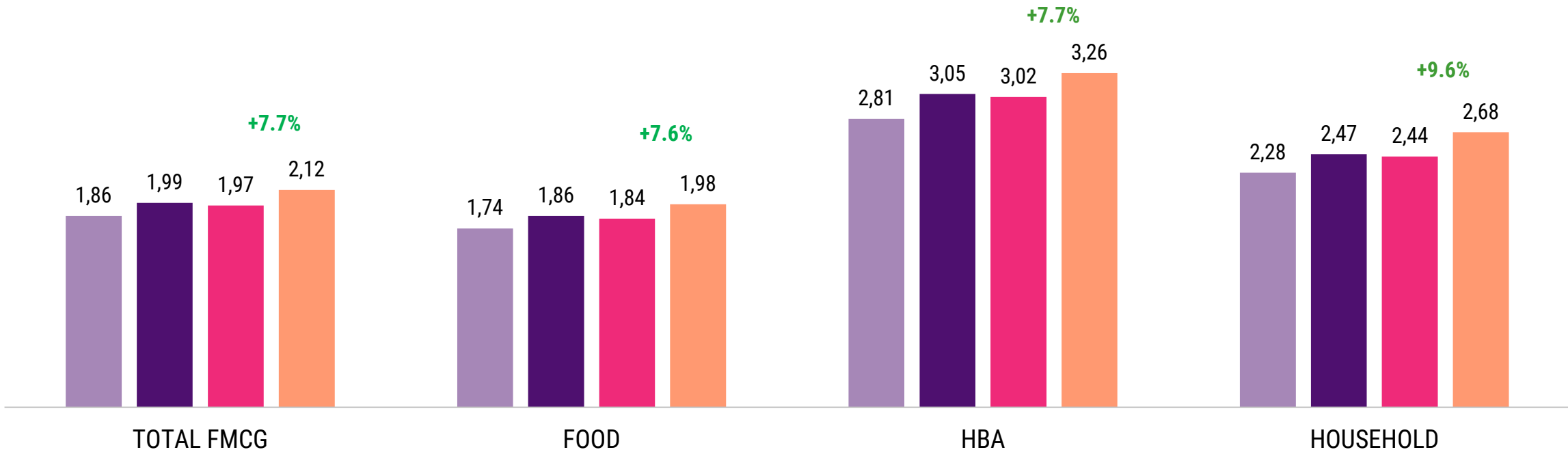
Increased promo intensity for Total FMCG in YTD 23 due to Food & Household



Price per Unit per Giga Category

More intense Price increase for Household in YTD 23

■ YEAR 2021 ■ YEAR 2022 ■ YTD 22 ■ YTD 23



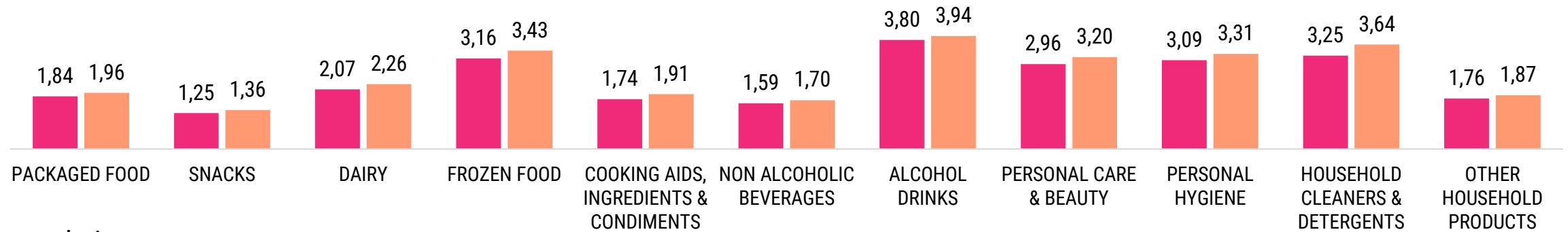
Source: Circana InfoScan, HM/SM, YTD October 23

Price per Unit per Category

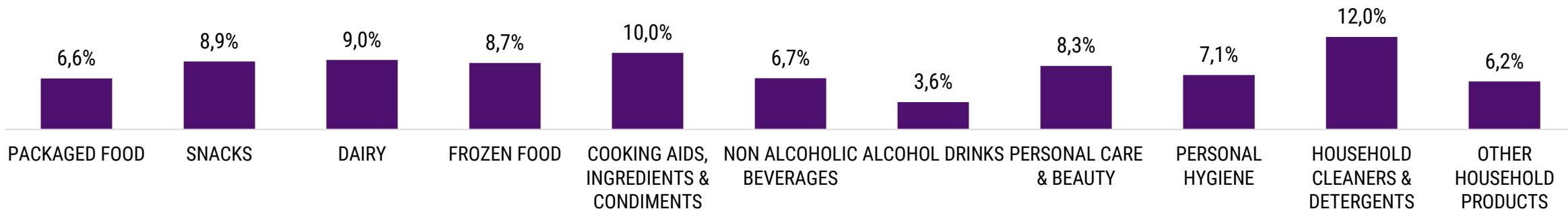
Regarding Food Categories, Cooking Aids present the highest price increase in YTD 23

Price per Unit

■ YTD 22 ■ YTD 23



Price evolution



Source: Circana InfoScan, HM/SM, YTD October 23

Thank you

