



MARKET VIEW May 2023

Trends for the Greek FMCG environment

May 2023



Study ID

01 METRICS

Value and Units Sales Trends:
Super/Hyper Markets FMCG

Random Weight Value Sales Trends :
Super/Hyper Markets

03 AREAS

Greece Mainland & Crete

02 CHANNELS

Super/Hyper Markets

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

04 PERIODS

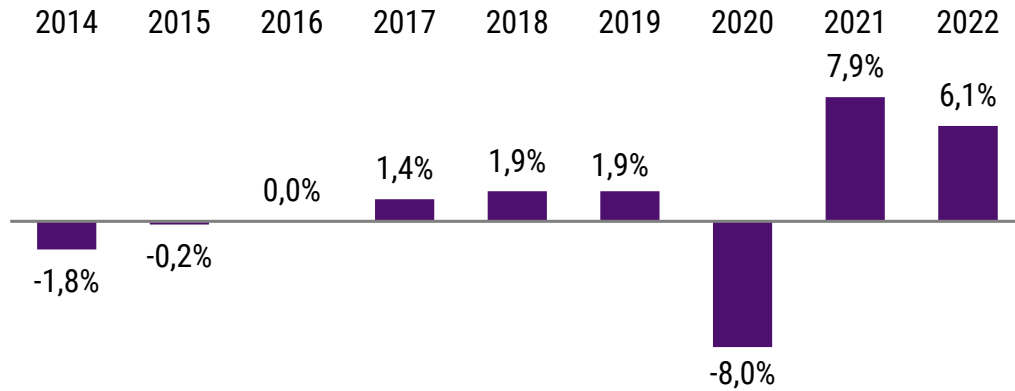
YR 2022 vs YR 21
Jan - May 2023 vs Jan - May 2022

01

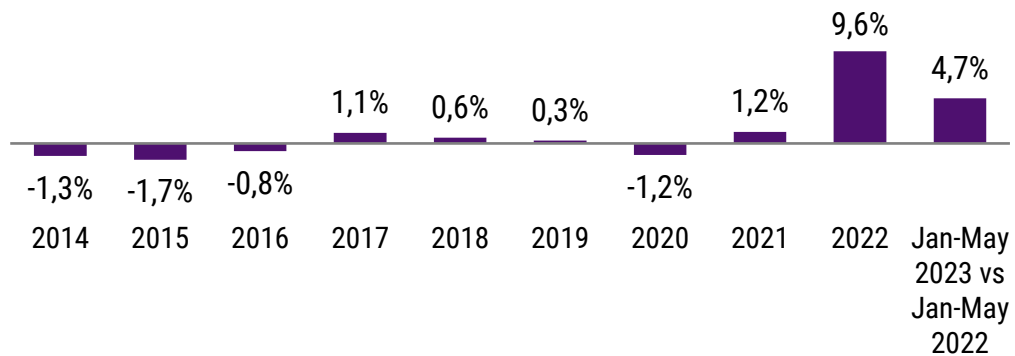
Greek Economy

Greek Economy

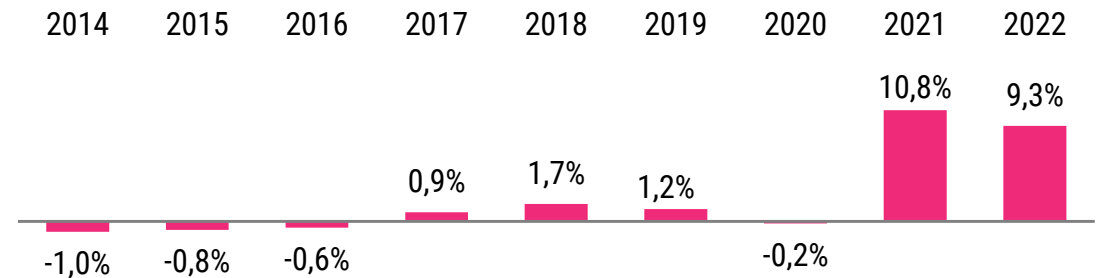
GDP



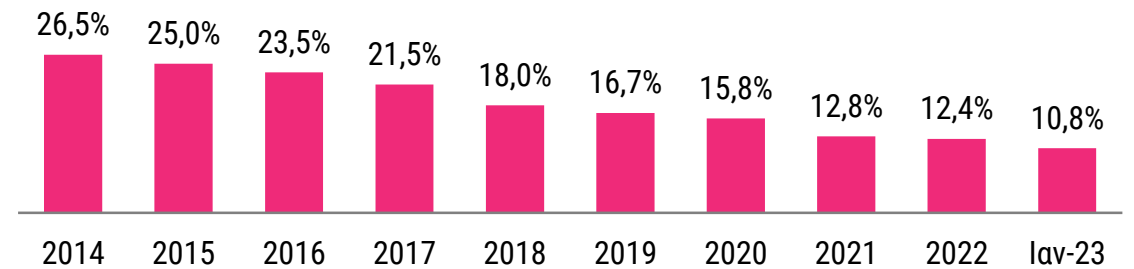
INFLATION RATE TREND



RETAIL TURNOVER INDEX (w.o AUTOMOTIVE FUEL)



UNEMPLOYMENT





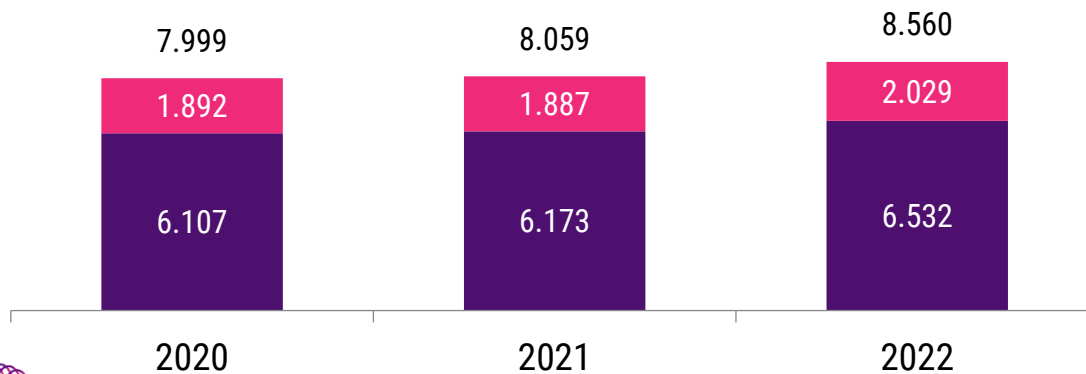
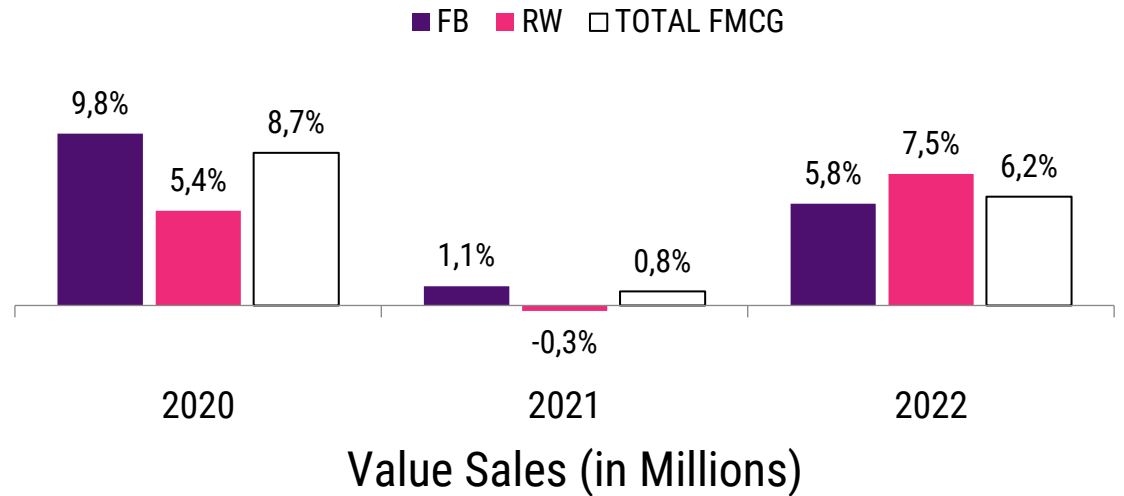
02

Trends for FMCG Market

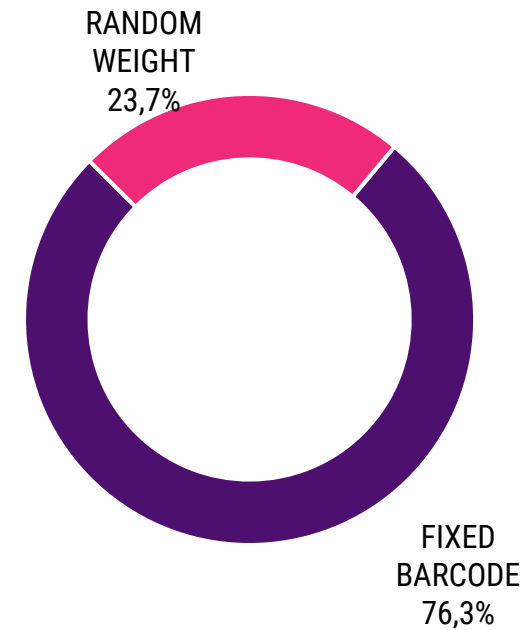
Fixed Barcodes & Random Weight

FMCG Value Sales Trend – Year 2022

Growth 6.2% for Total FMCG Market in 2022, coming from both Segments



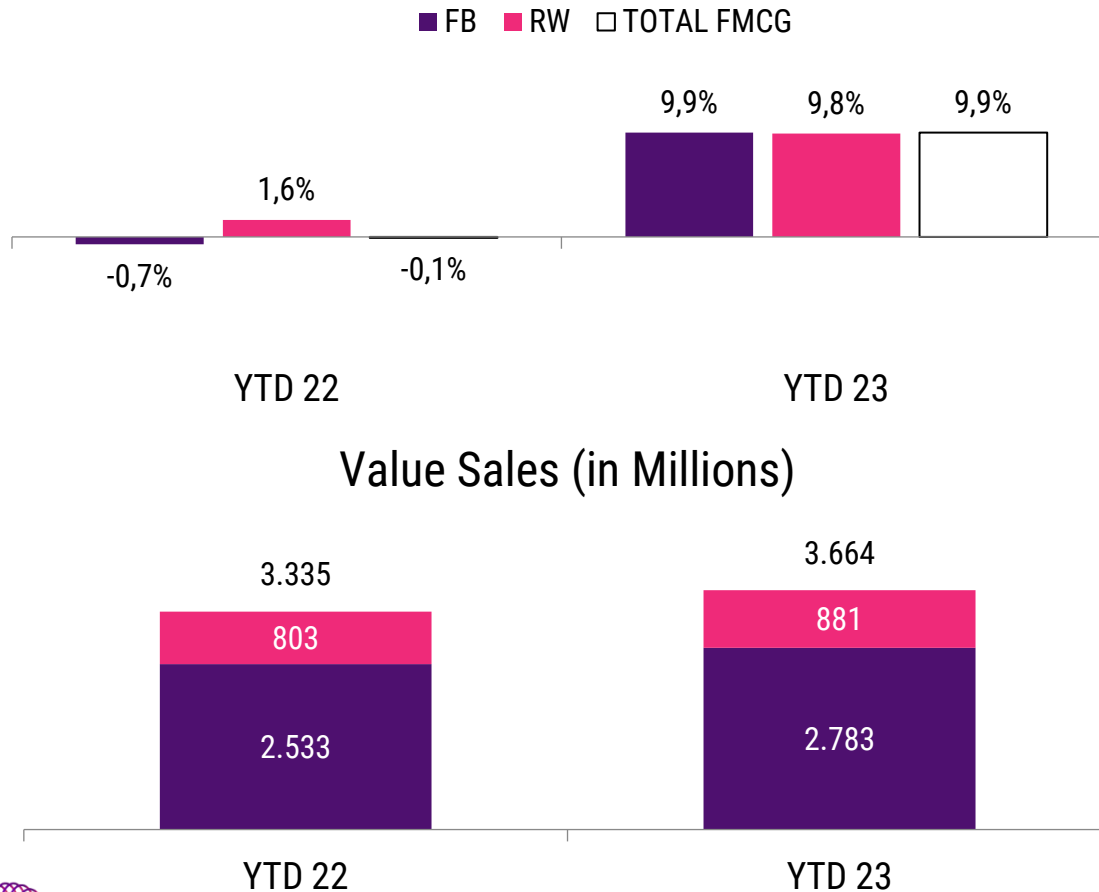
2022 Value Contribution



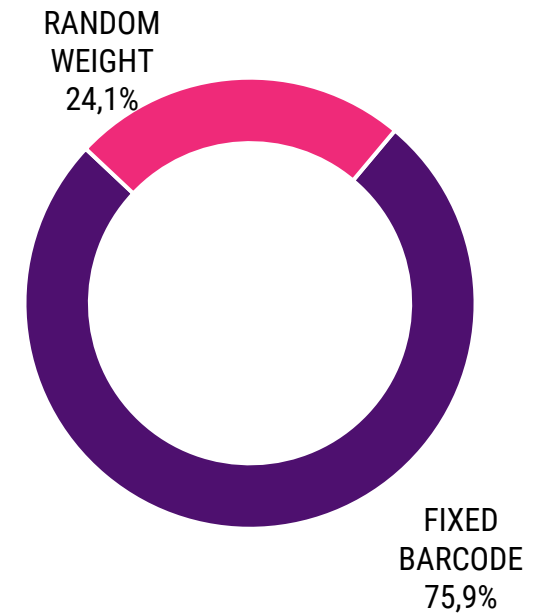
Source: Circana InfoScan, HM/SM + Random Weight, Year 2022

FMCG Value Sales Trend – YTD

Intense increase for Total FMCG in YTD 23 (+9.9%) due to both Segments

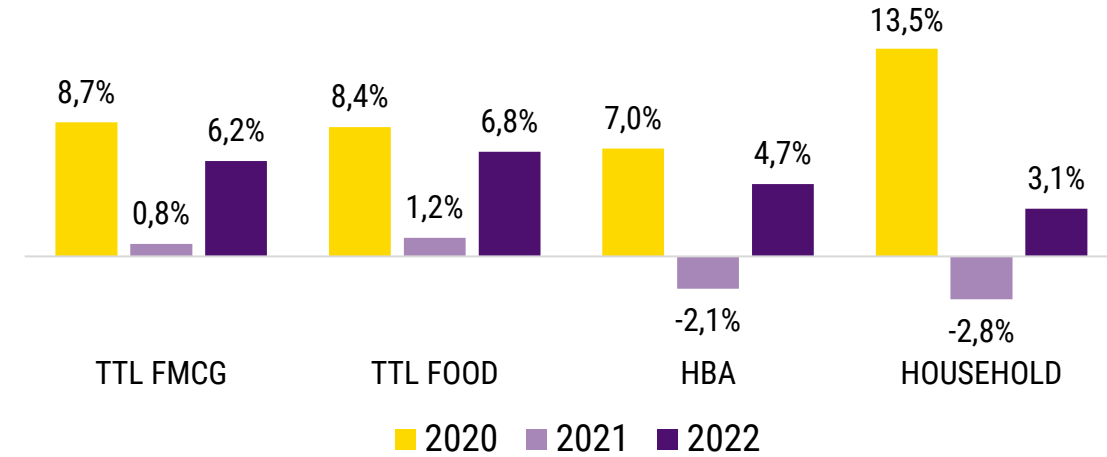


YTD 23 Value Contribution

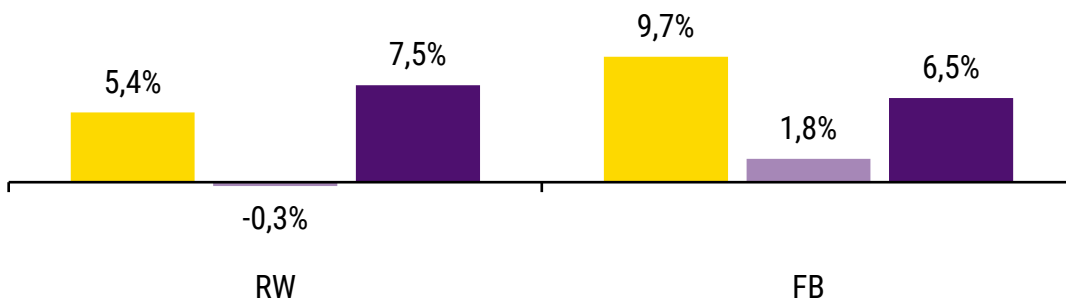


FMCG Value Sales Trend – Year 2022

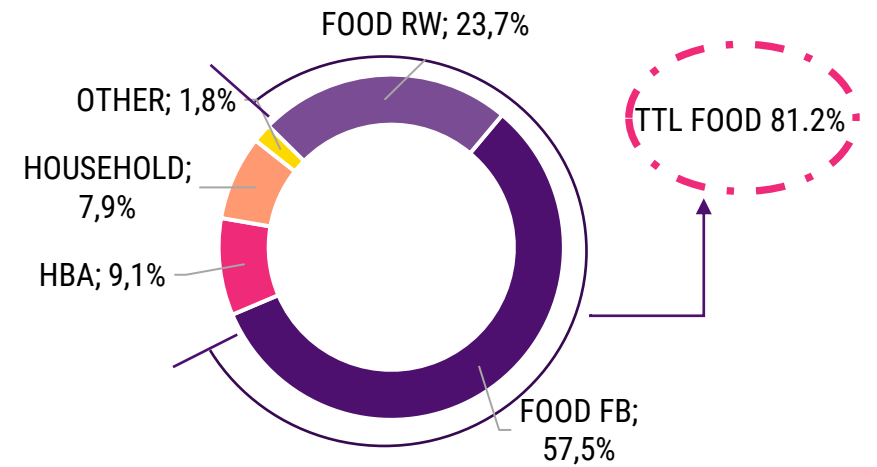
All 3 Categories (Food, HBA & Household) improved their sales in Year 2022



Food sales trend

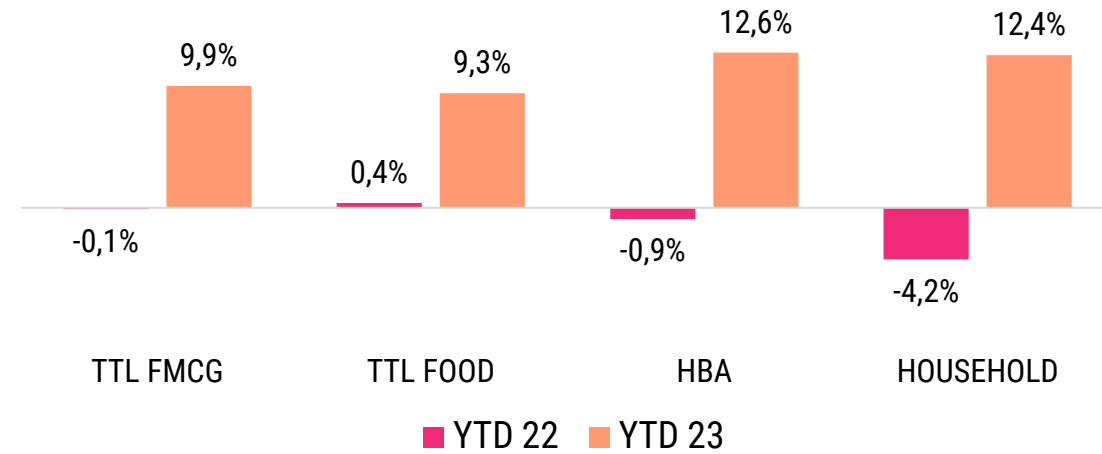


2022 Value Contribution

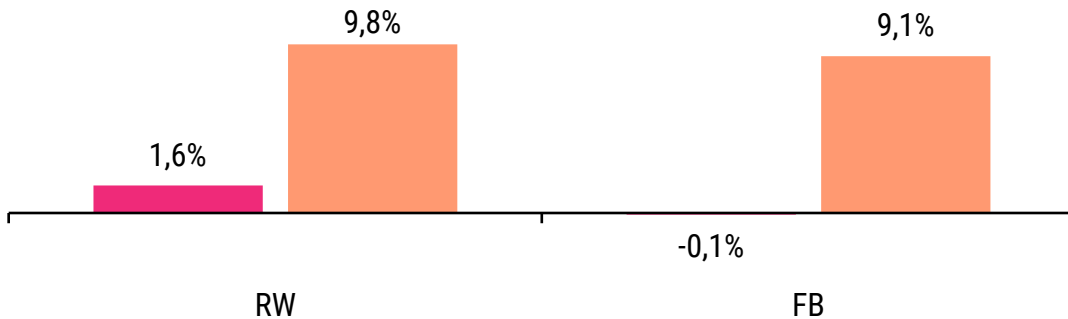


FMCG Value Sales Trend – YTD

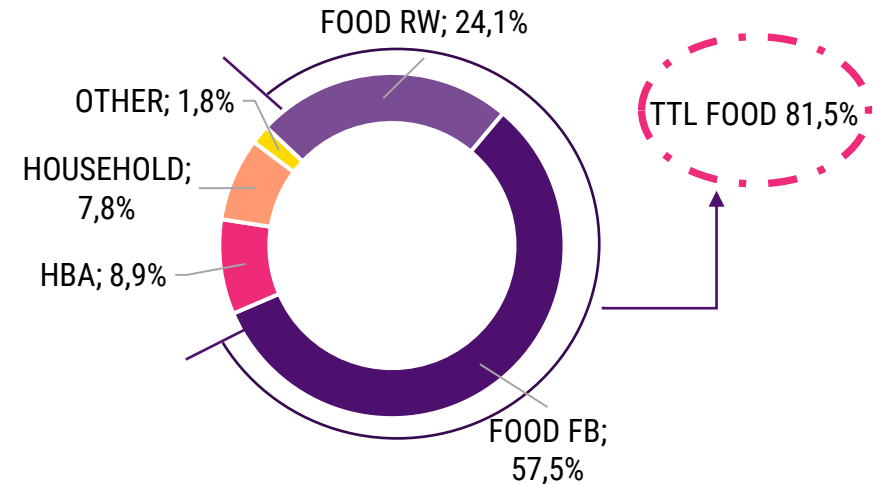
Intense Increase for all 3 Giga Categories (Food, HBA and Household) in YTD 23



Food sales trend

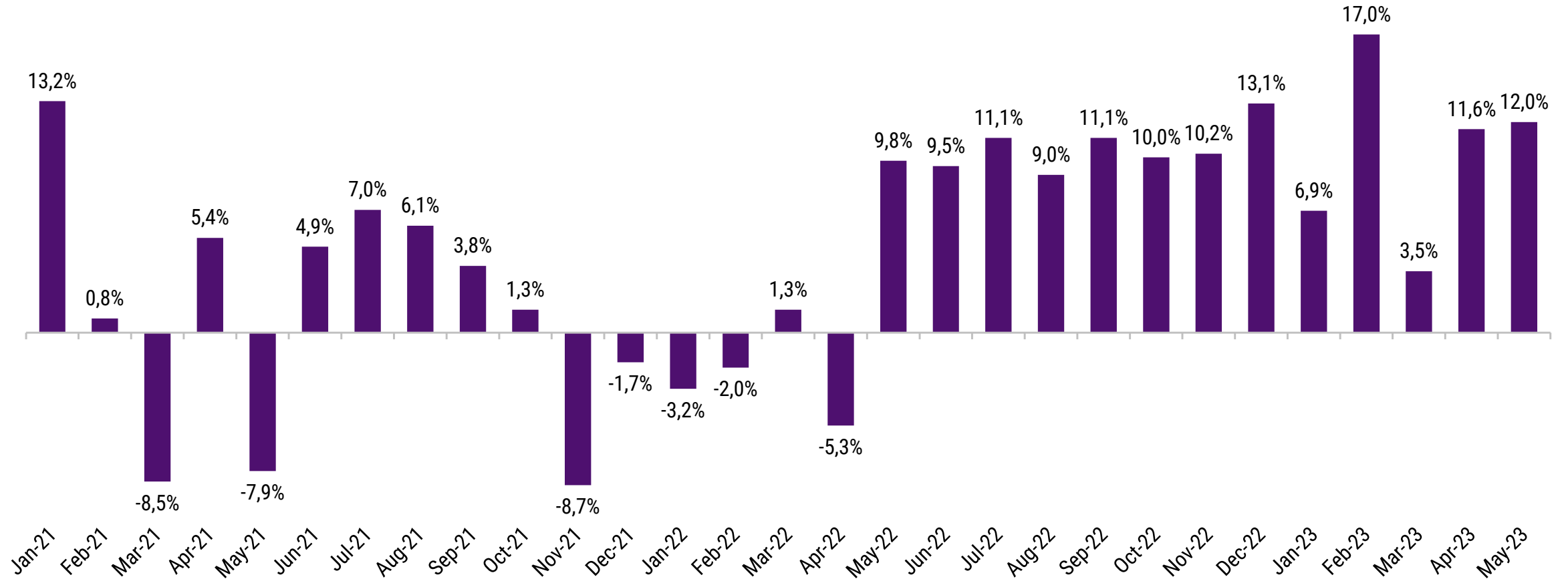


YTD 2023 Value Contribution



FMCG Monthly Sales Trends

May value sales increased by 12%



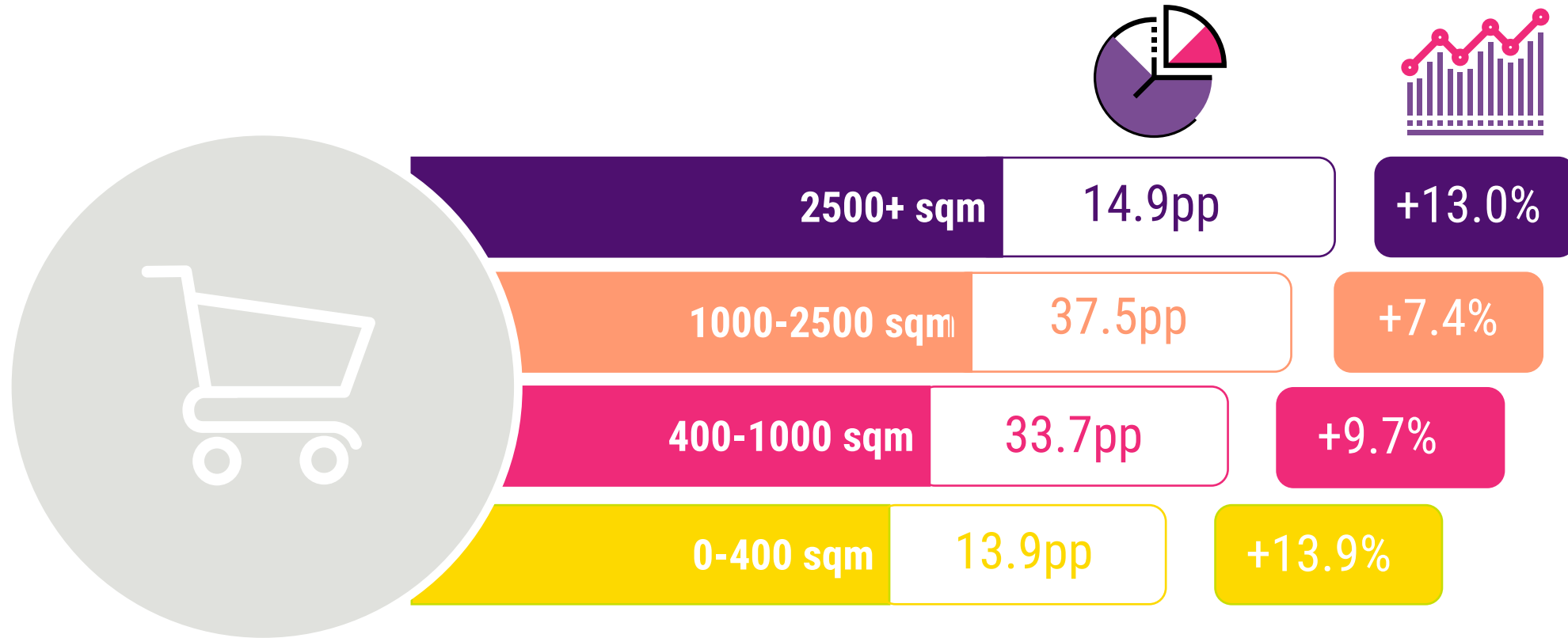


03

Retail w/o
Random
Weight

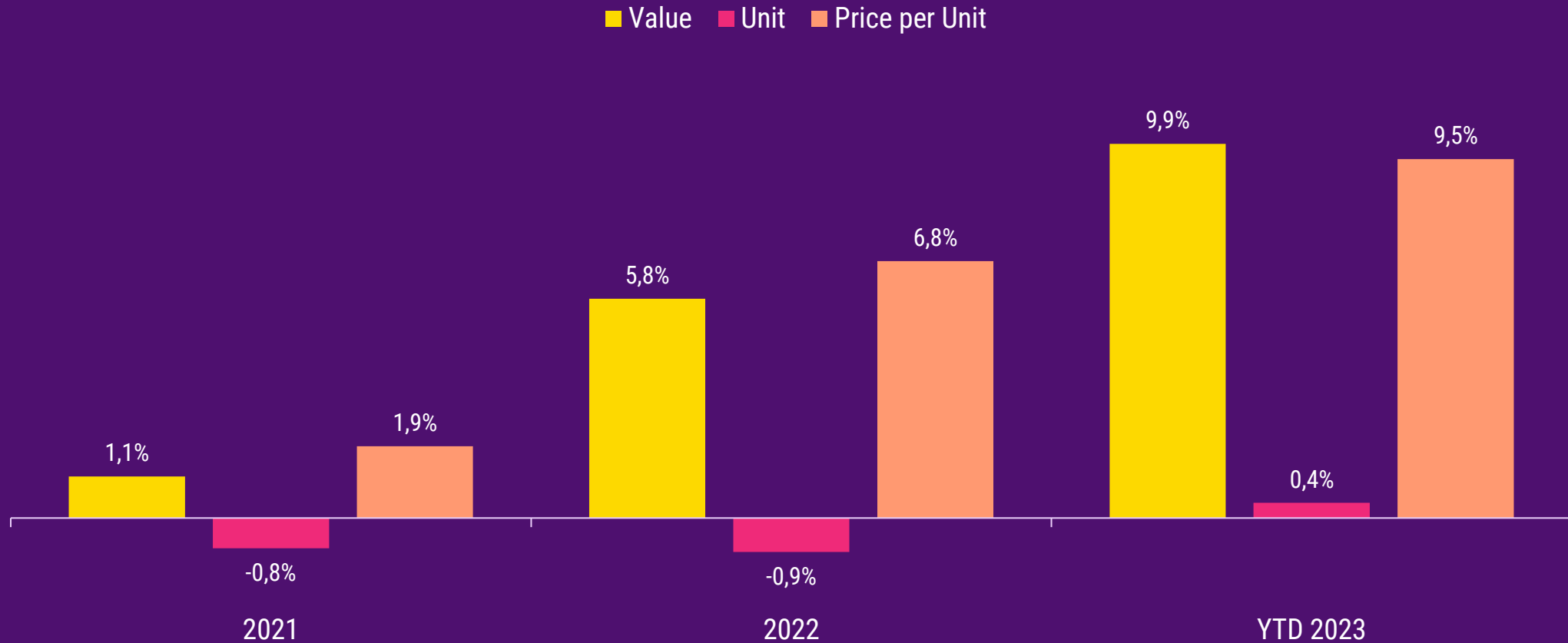
FMCG Value Sales Trends per Store Type

Small and Hyper SMs succeed the highest increase in YTD 23



FMCG Price Trends

Increased prices in YTD 23 by 9,5%

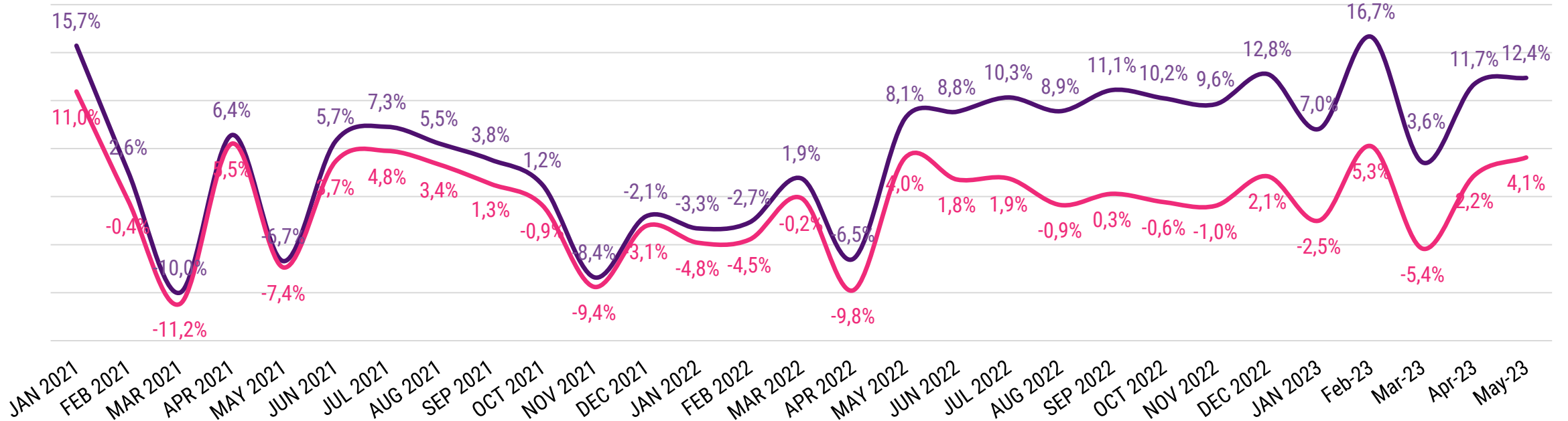


FMCG Value and Unit Monthly Trends

Value Sales of May increased by 12,4%, while Unit Sales by 4,1%

YR 2021: +1.1%
YR 2022: +5.8%
YTD 2023: +9.9%

— Value Sales trend vs. Year Ago — Unit Sales trend vs. Year Ago



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



04

Giga Categories Evolution

Giga Categories Value Sales Trend

Intense increase for all 3 Giga Categories in YTD 23

YTD 23



9.1%



12.6%



12.4%

Food

Health & Beauty

Household

2022



6.5%



4.7%



3.1%

Giga Categories Unit Sales Trend

Household is the only Category with declining Unit Sales in YTD 23

YTD 23



0.1%



2.6%



-0.7%

Food

Health & Beauty

Household

2022



-0.3%



-3.8%

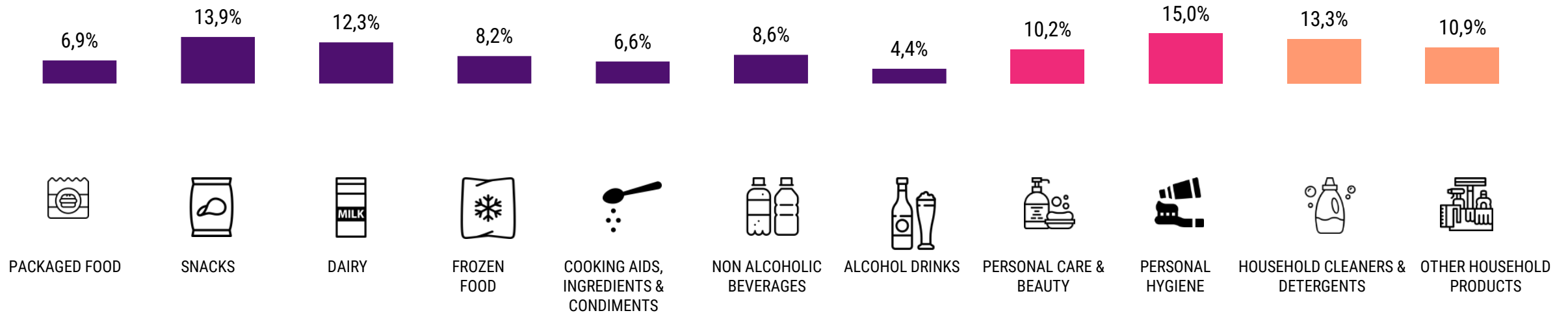


-5.0%

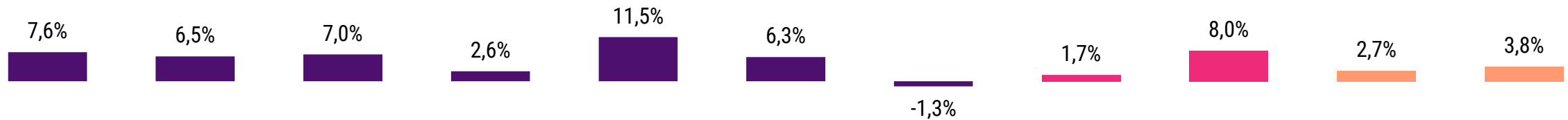
Categories Value Sales Trend YTD 23

Regarding Food Categories, Snacks and Dairy demonstrate the highest increase

Value Sales Trend YTD 23



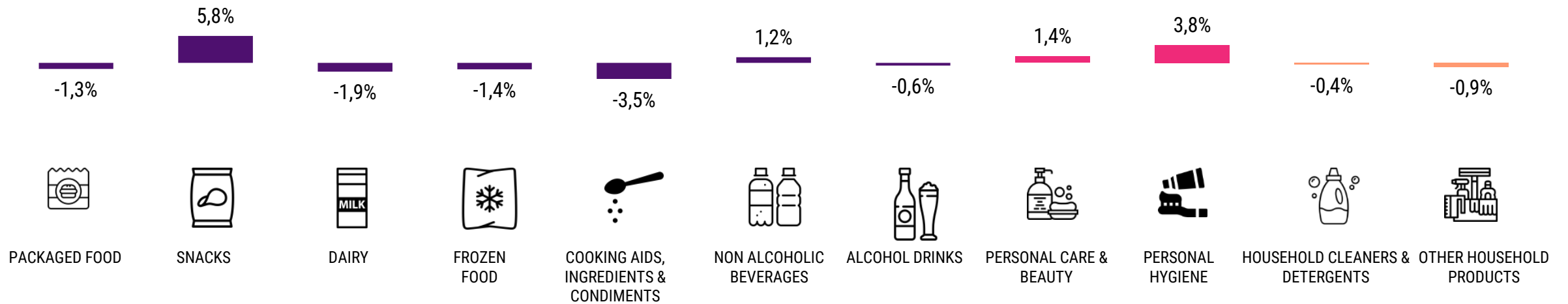
Value Sales Trend 2022



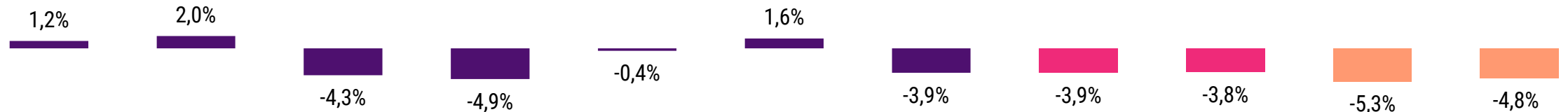
FMCG Unit Sales Trend YTD 23

Regarding Food Categories, Snacking and Bevs survive in terms of Units in YTD 23. Both Personal Care and Personal Hygiene increase their sales in YTD 23

Unit Sales Trend YTD 23



Unit Sales Trend 2022



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

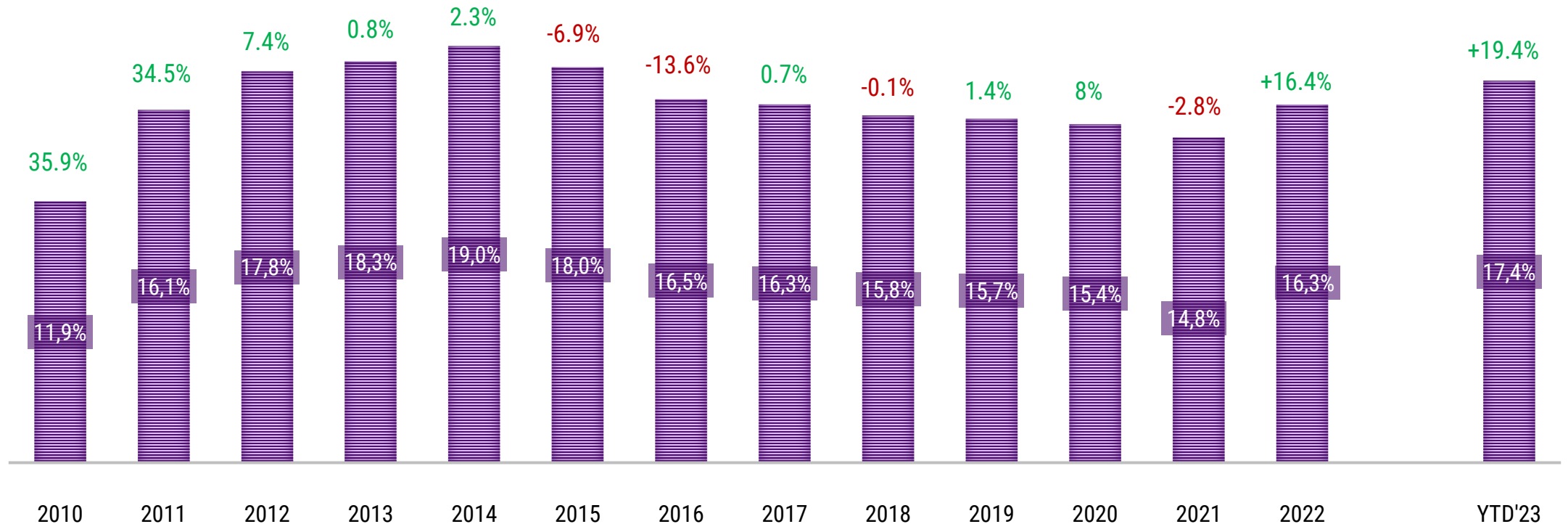


05

Evolution of Private Labels

PL Value Share and Trends

PL achieve +19.4% growth in YTD 23



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

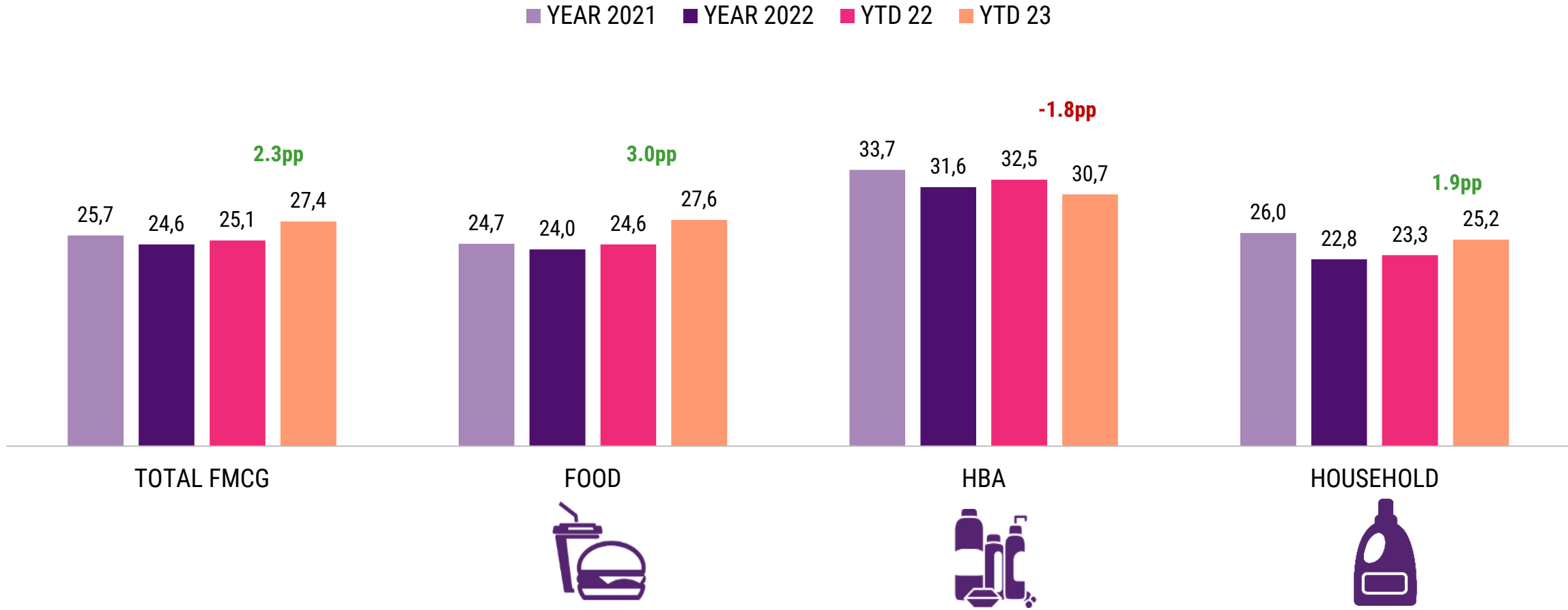


06

Price Trends & Promo Pressure

%Value Sales due to Temporary Price Reduction

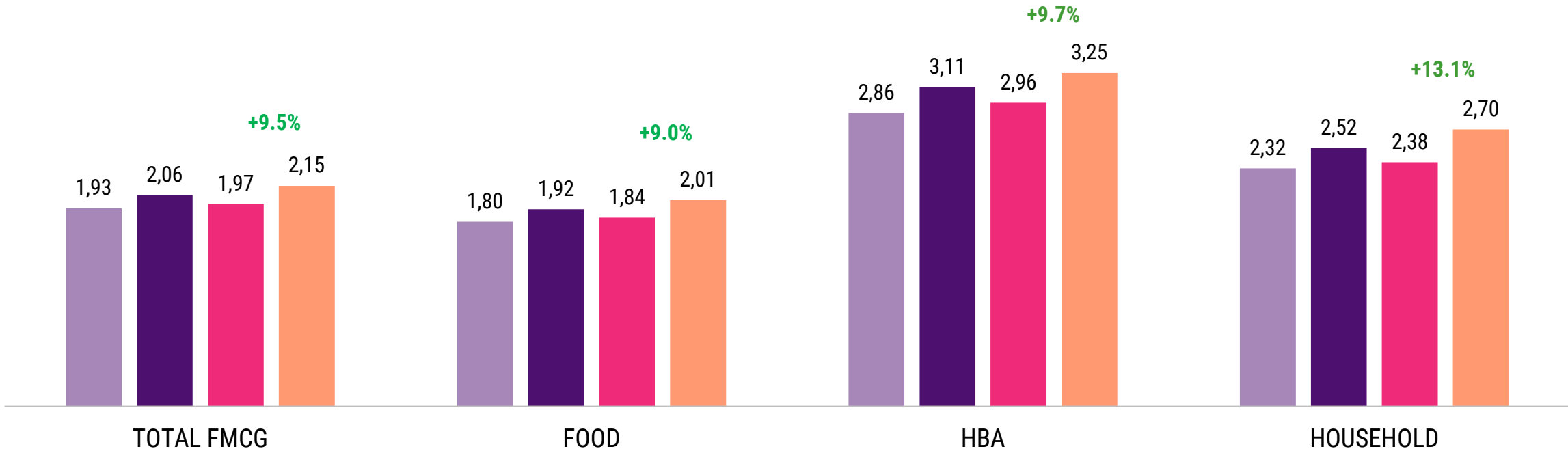
Increased promo intensity for Total FMCG in YTD 23 due to Food & Household



Price per Unit per Giga Category

More intense Price increase for Household in YTD 23

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



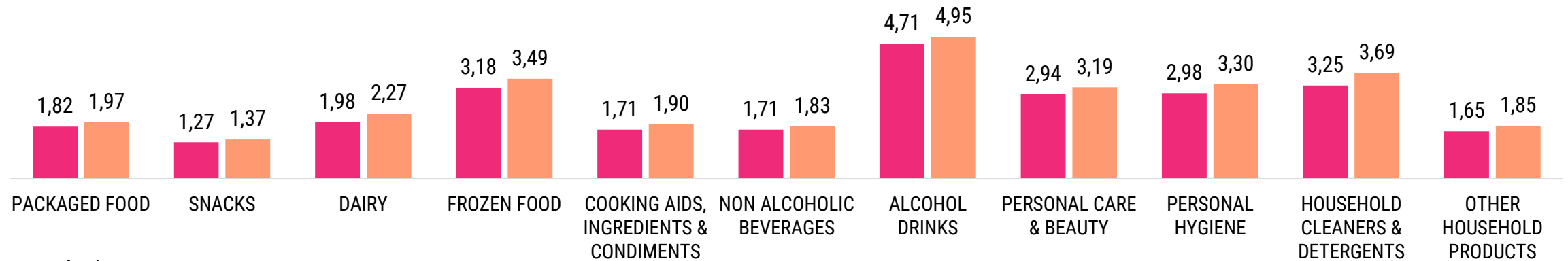
Source: Circana InfoScan, HM/SM, YTD May 23

Price per Unit per Category

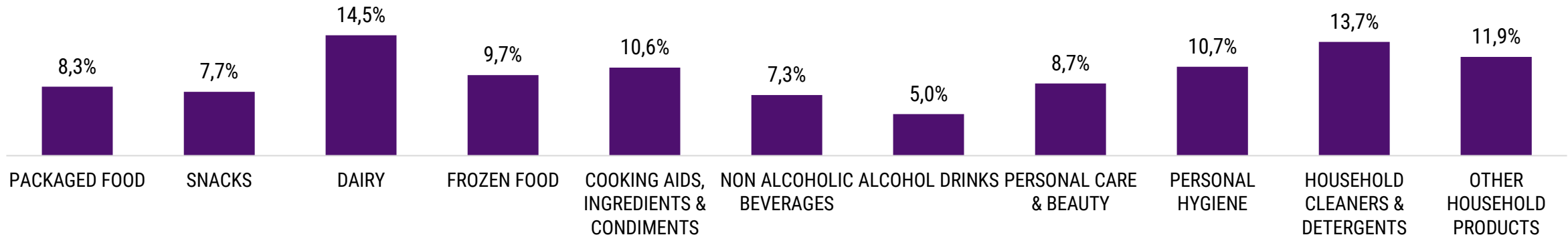
Regarding Food Categories, Dairy and Cooking Aids present the highest price increase in YTD 23

Price per Unit

■ YTD 22 ■ YTD 23



Price evolution



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

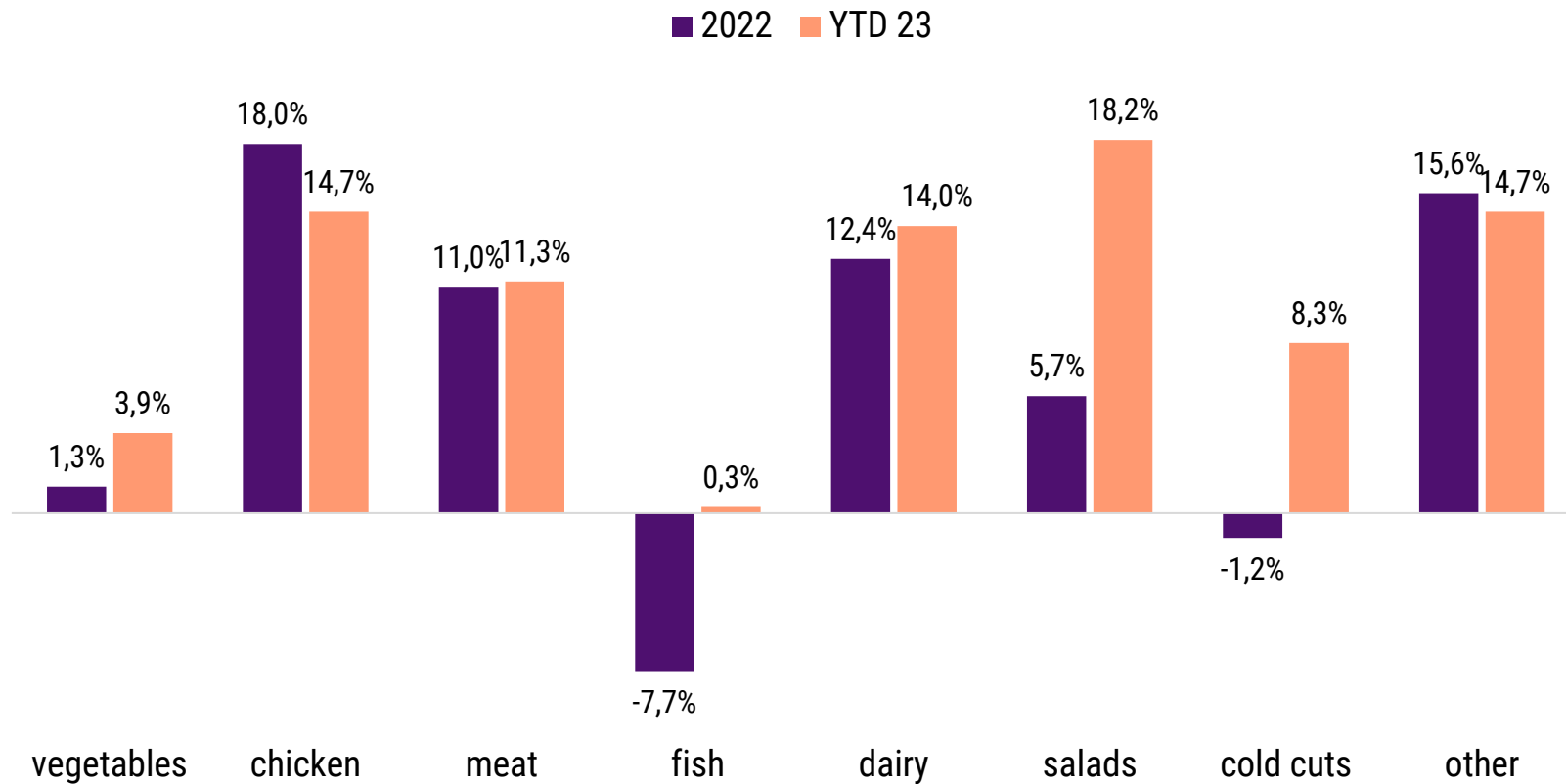


07

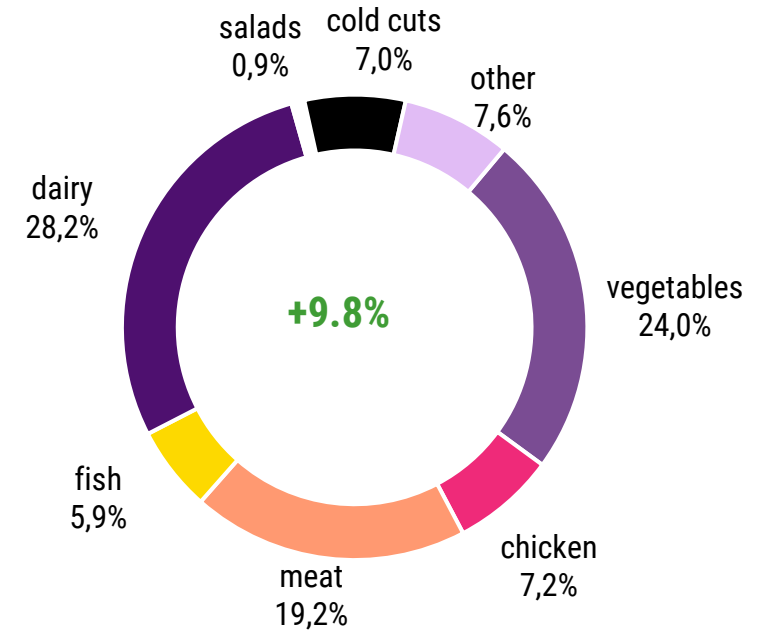
Random Weight Categories

Random Weight Value Sales Trend

All Categories are increasing in YTD 23



YTD 23 Contribution



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

Thank you

