MARKET VIEW
July 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

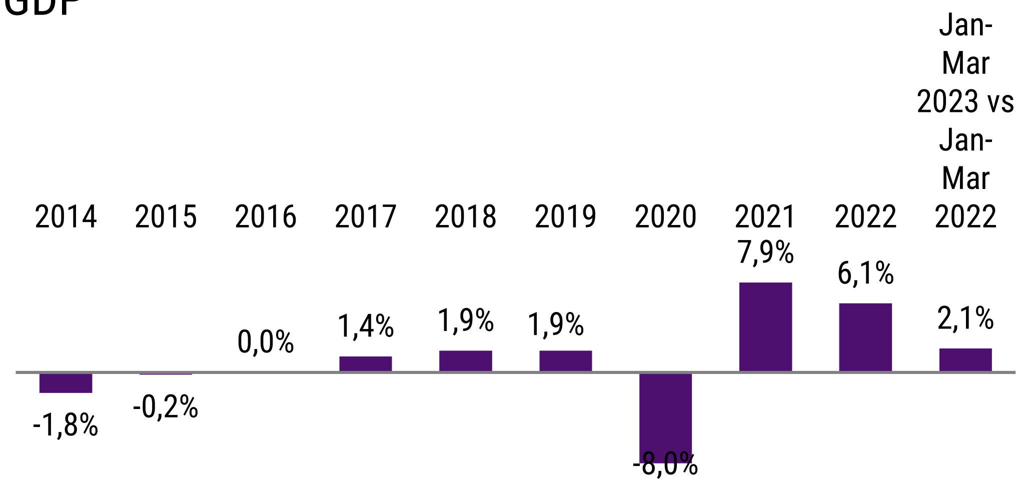
YR 2022 vs YR 21
YTD July 2023 vs YTD July 2022

01

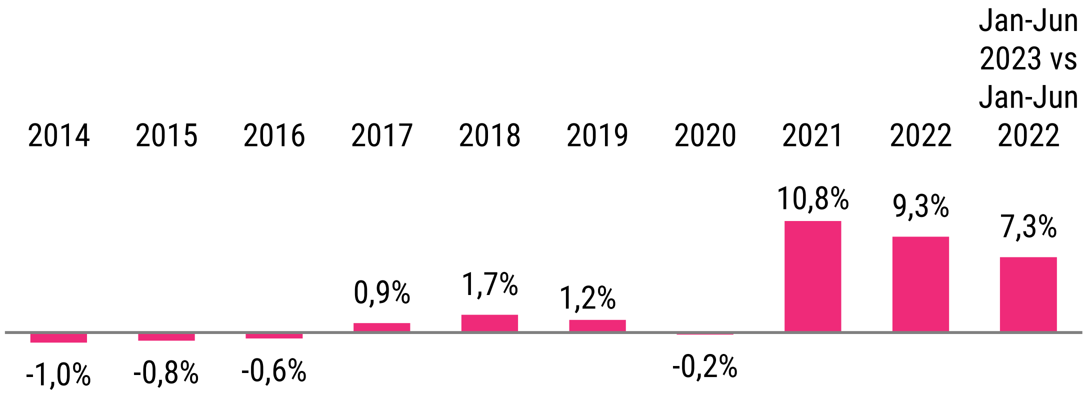
Greek Economy

Greek Economy

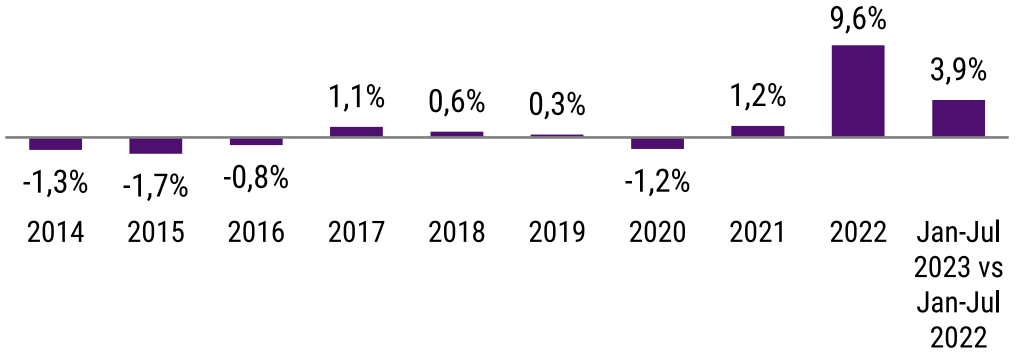
GDP



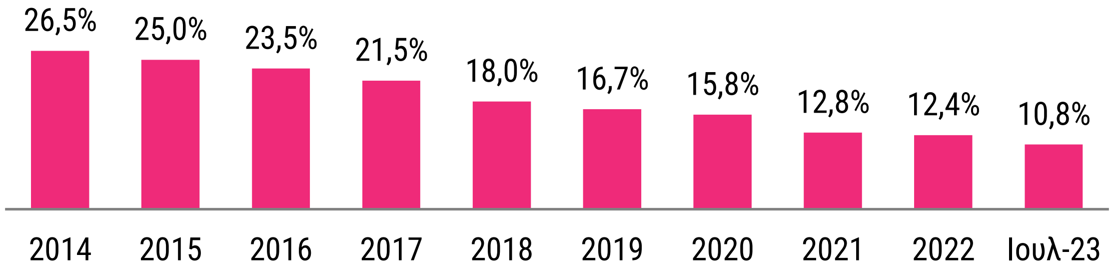
RETAIL TURNOVER INDEX (w.o AUTOMOTIVE FUEL)



INFLATION RATE TREND



UNEMPLOYMENT



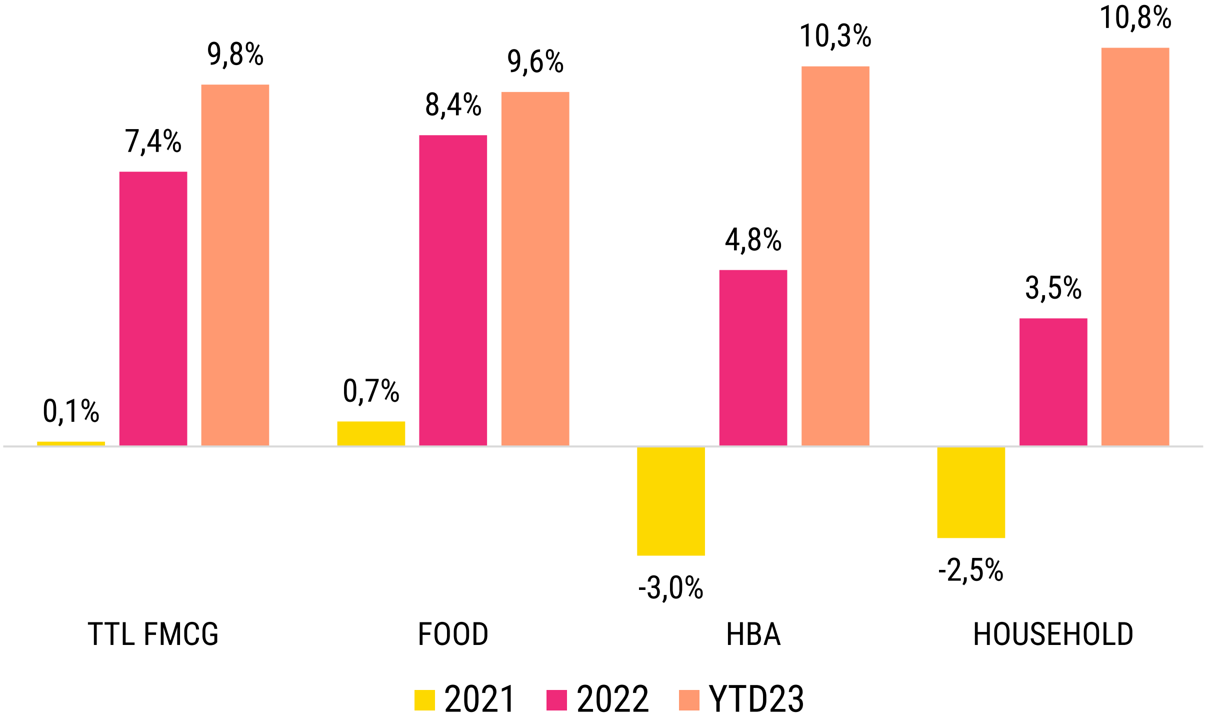
Source: ELSTAT (latest available period/provisional data

02 Trends for FMCG Market

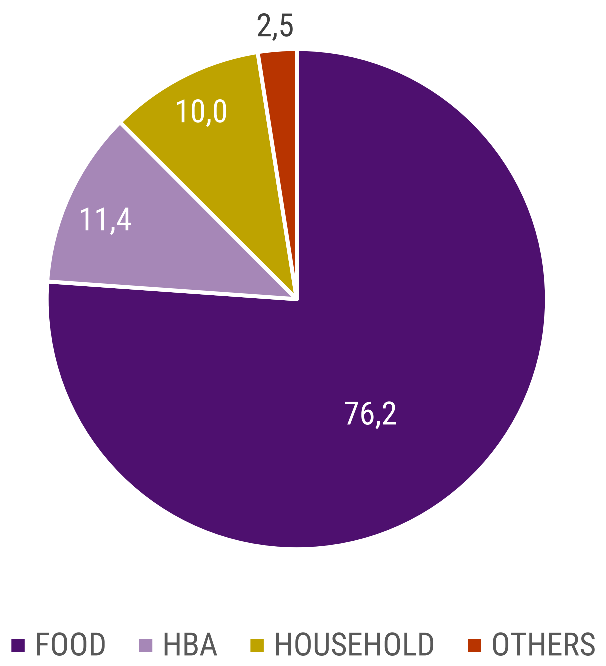
Fixed Barcodes

FMCG Value Sales Trend – YTD 23

All 3 Categories (Food, HBA & Household) improve their sales in YTD 23



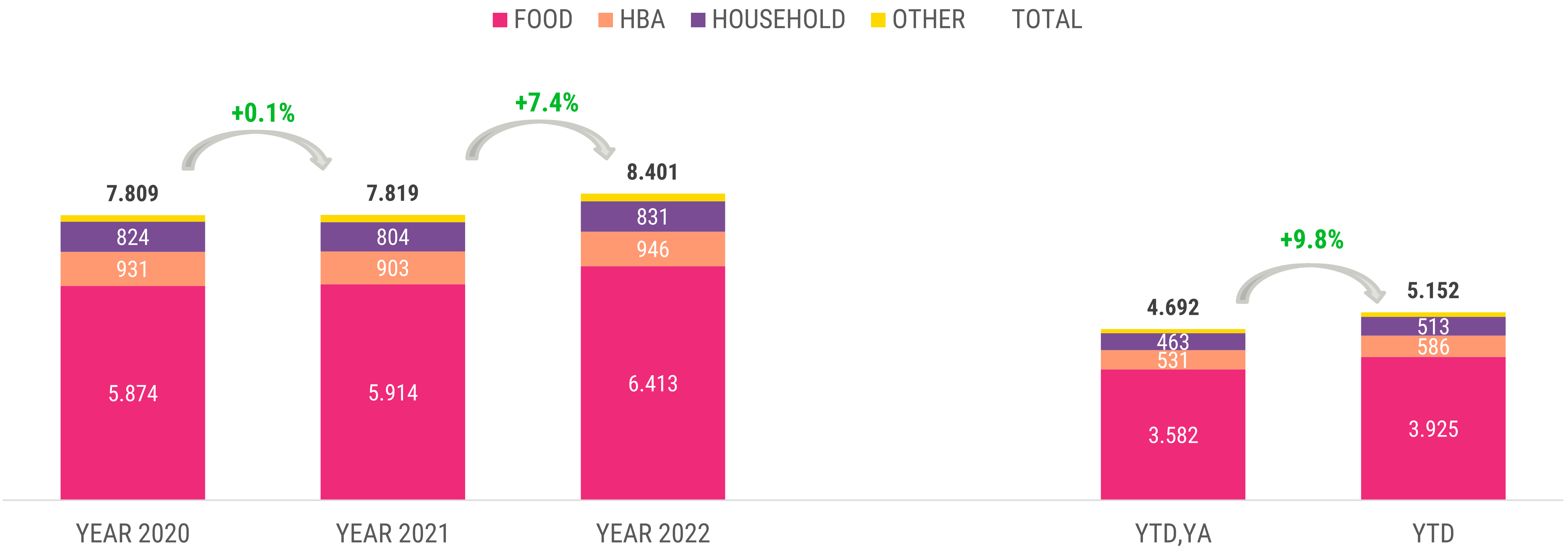
YTD Value Contribution



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

Total Greece Value Sales in million €

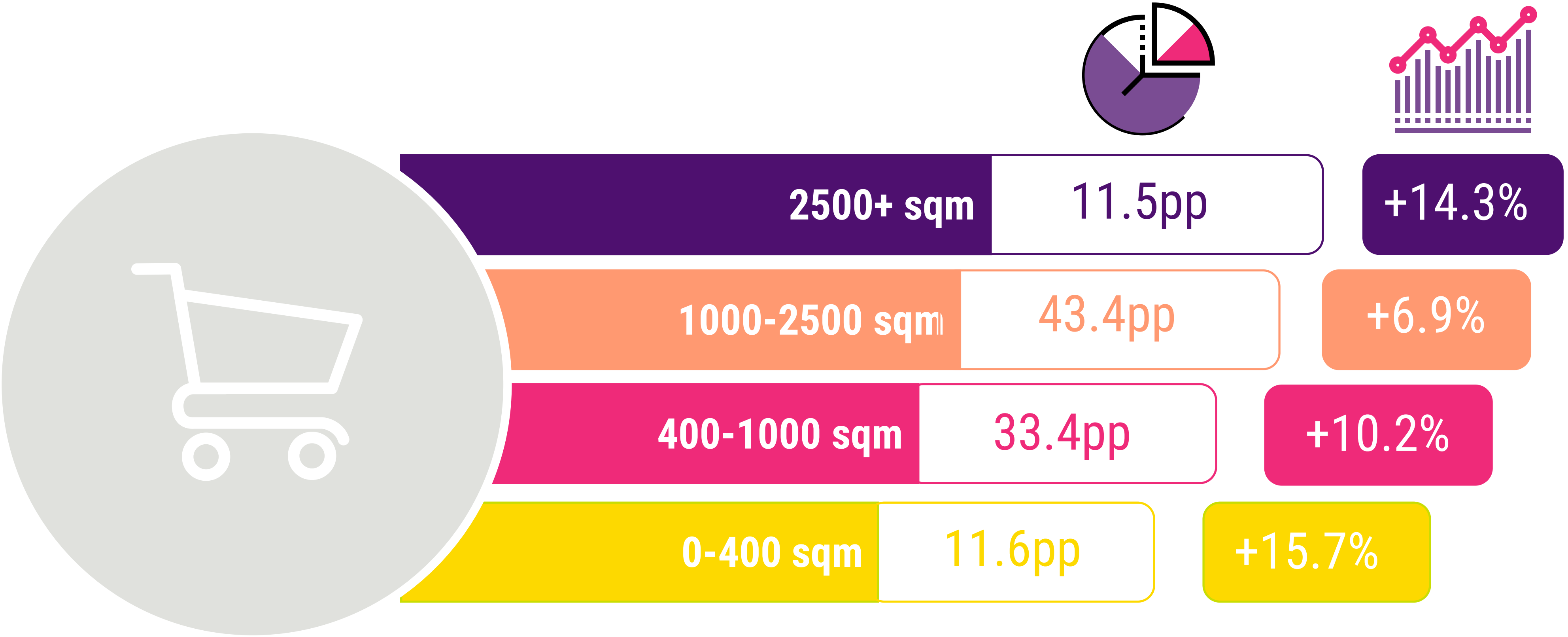
Total Value Sales of Year 2022 exceeded 8,4 billions



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

FMCG Value Sales Trends per Store Type

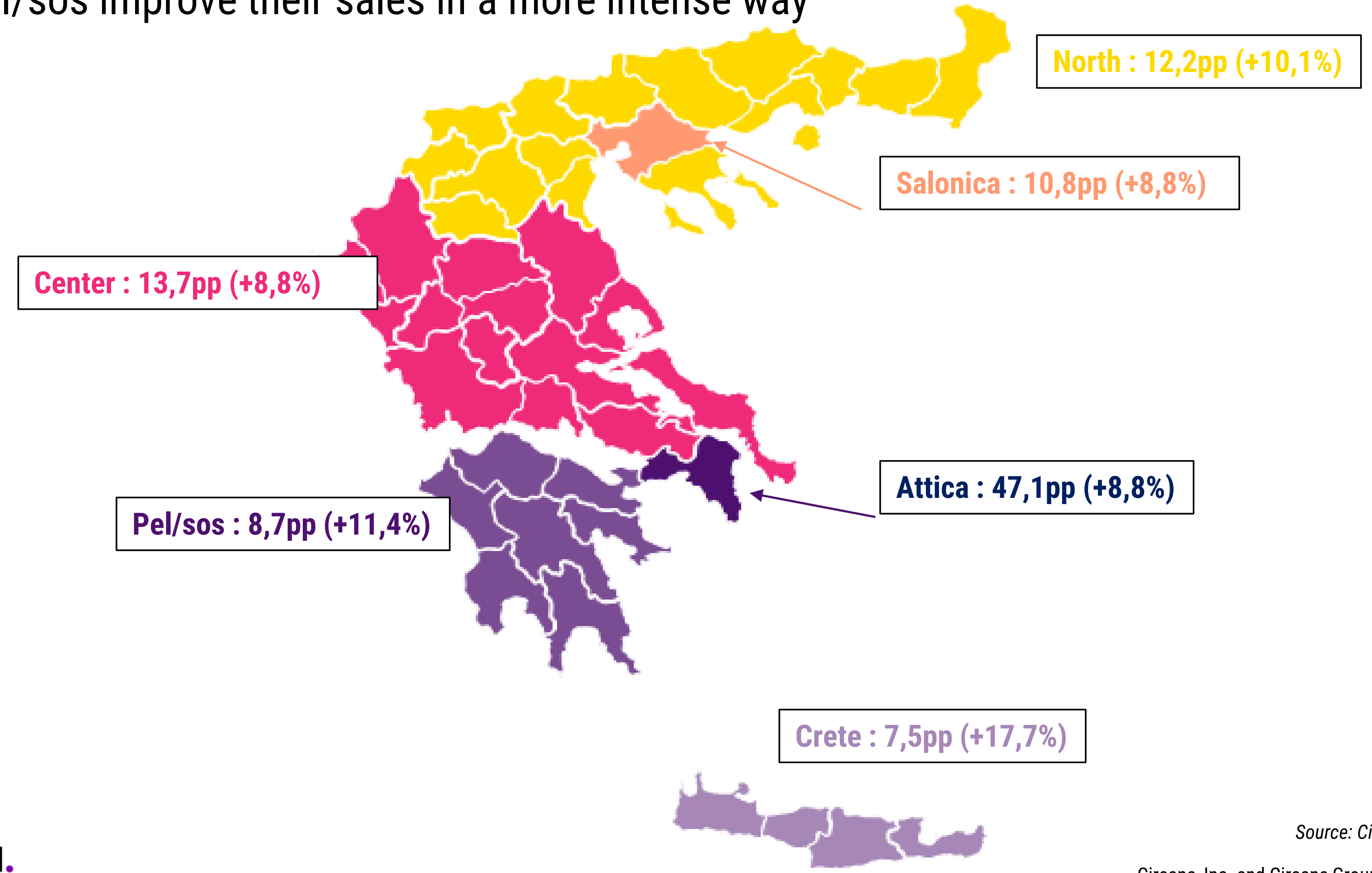
Small and Hyper SMs succeed the highest increase in YTD 23



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

FMCG Value Sales Trends per Geo YTD 23

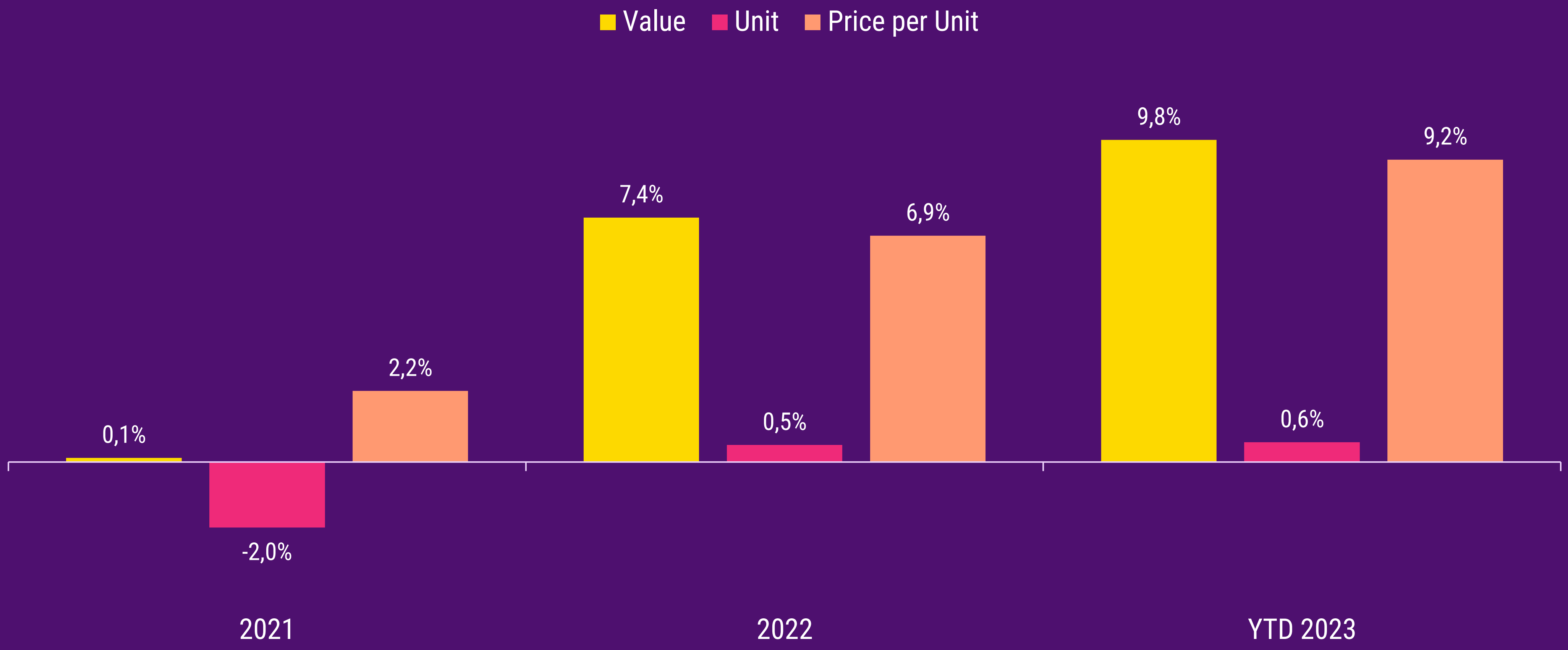
Crete and Pel/sos improve their sales in a more intense way



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

FMCG Price Trends

Increased prices in YTD 23 by 9,2%

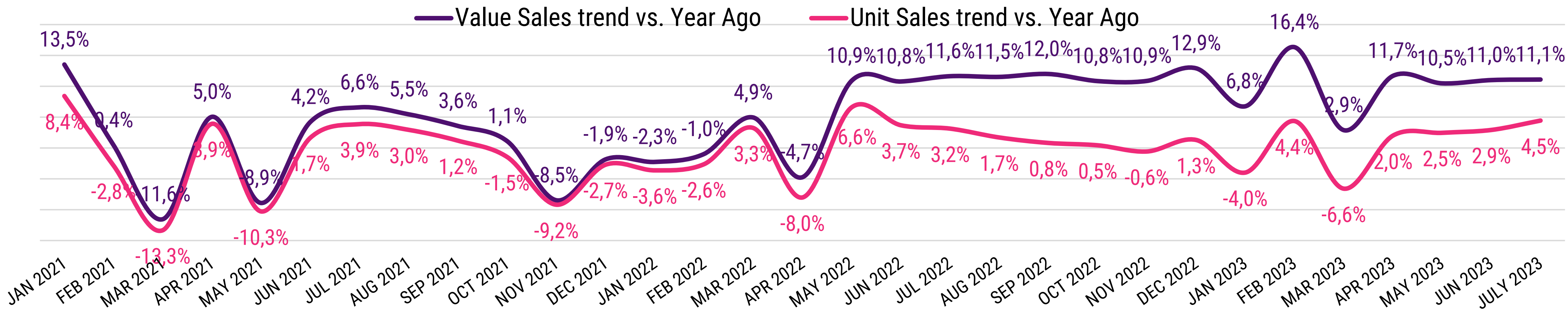


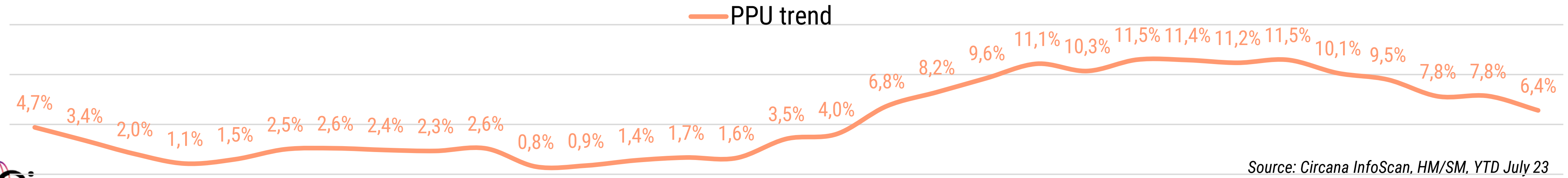
Source: Circana InfoScan, HM/SM , YTD July 23

FMCG Value and Unit Monthly Trends

Price increase for last month by 6,4%

YR 2021: +0.1%
YR 2022: +7.4%
YTD 2023: +9.8%





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

03 Giga Categories Evolution

Giga Categories Value Sales Trend

HBA and Household demonstrate double digit growth in YTD 23

	Food	Health & Beauty	Household
YTD 23	9.6%	10.3%	10.8%
2022	8.4%	4.8%	3.5%

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

Giga Categories Unit Sales Trend

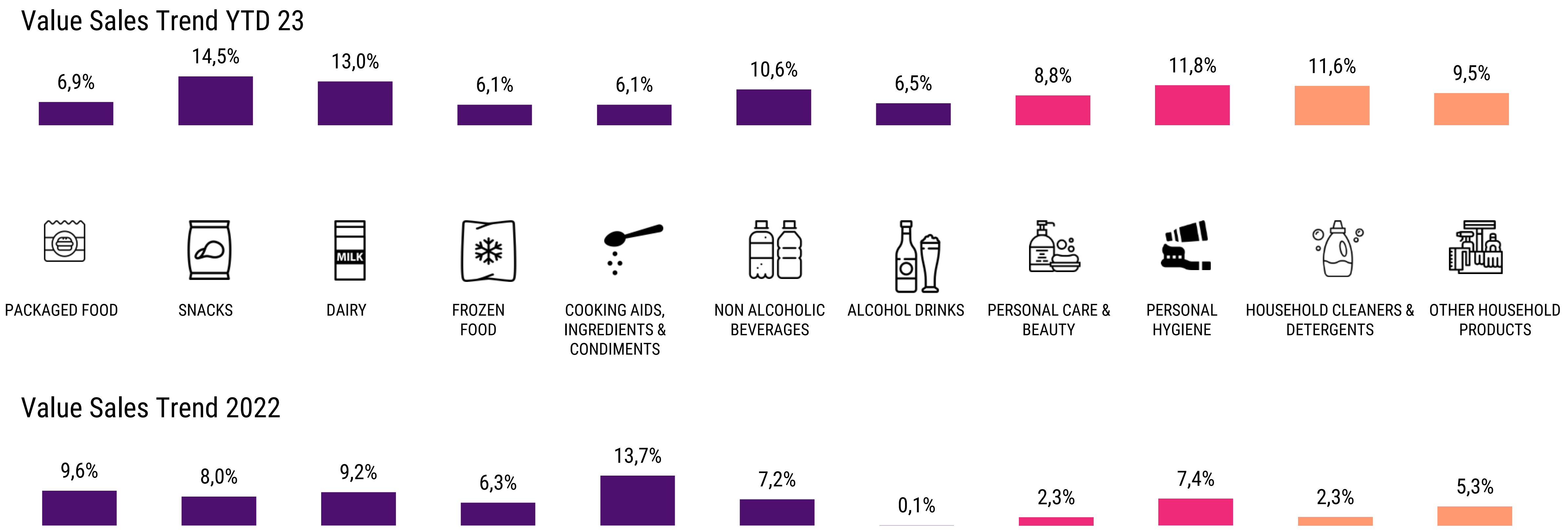
Food and HBA are slightly increasing their Unit Sales in YTD 23

	Food	Health & Beauty	Household
YTD 23	0.6%	0.6%	-1.1%
2022	1.3%	-3.6%	-4.2%

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

Categories Value Sales Trend YTD 23

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

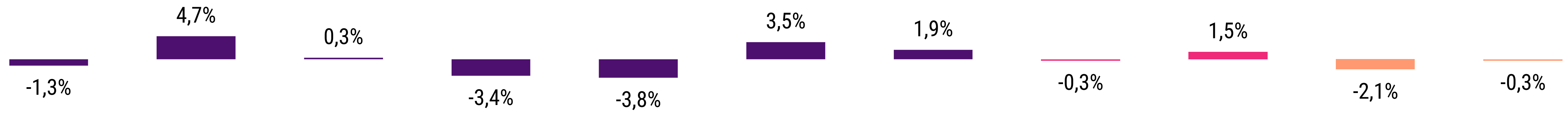


Source: Circana InfoScan, HM/SM , YTD July 23

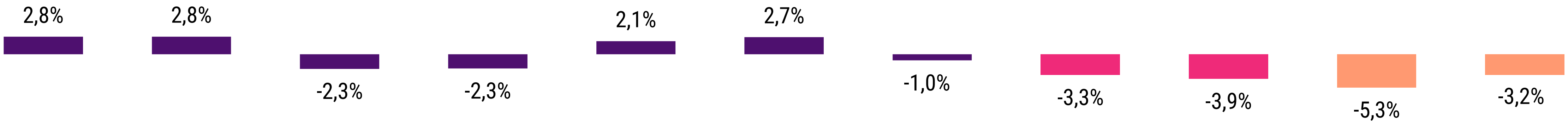
FMCG Unit Sales Trend YTD 23

Snacking and Beverages are the champions in YTD 23 in terms of Units

Unit Sales Trend YTD 23



Unit Sales Trend 2022



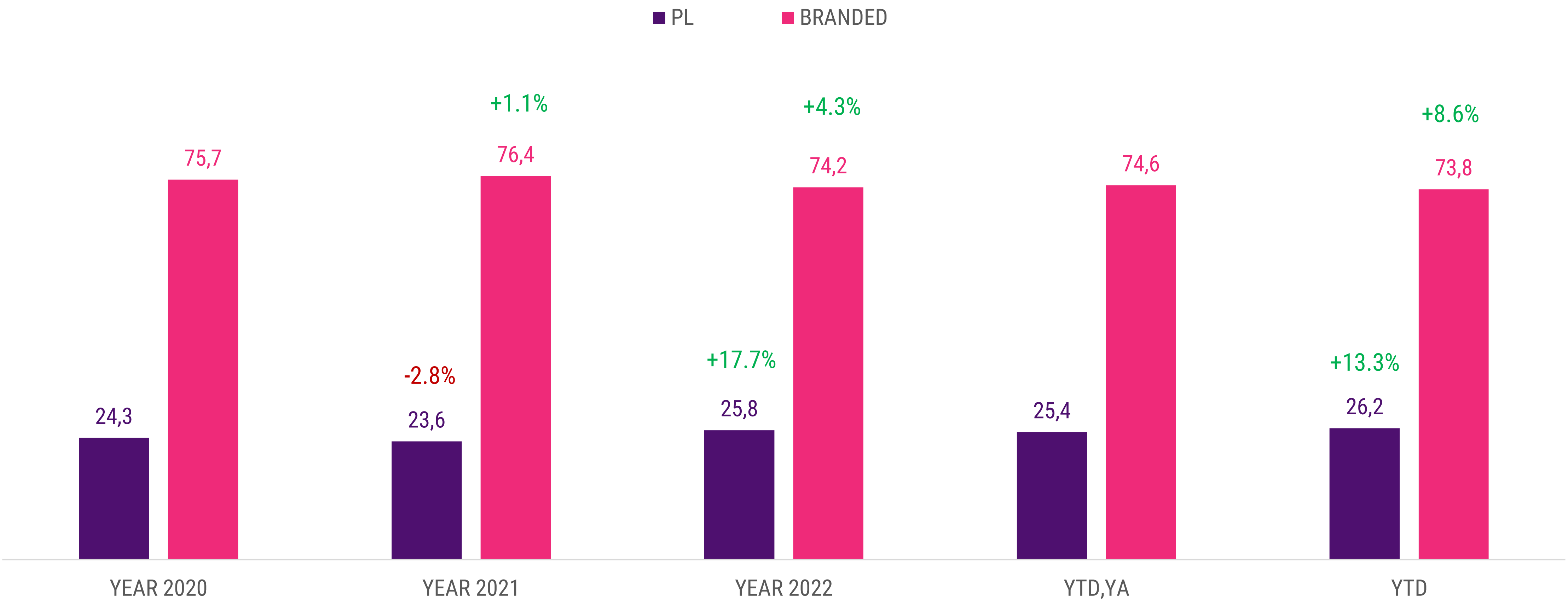
Source: Circana InfoScan, HM/SM , YTD July 23

04

Evolution of Private Labels

PL and Branded Value Shares and Trends

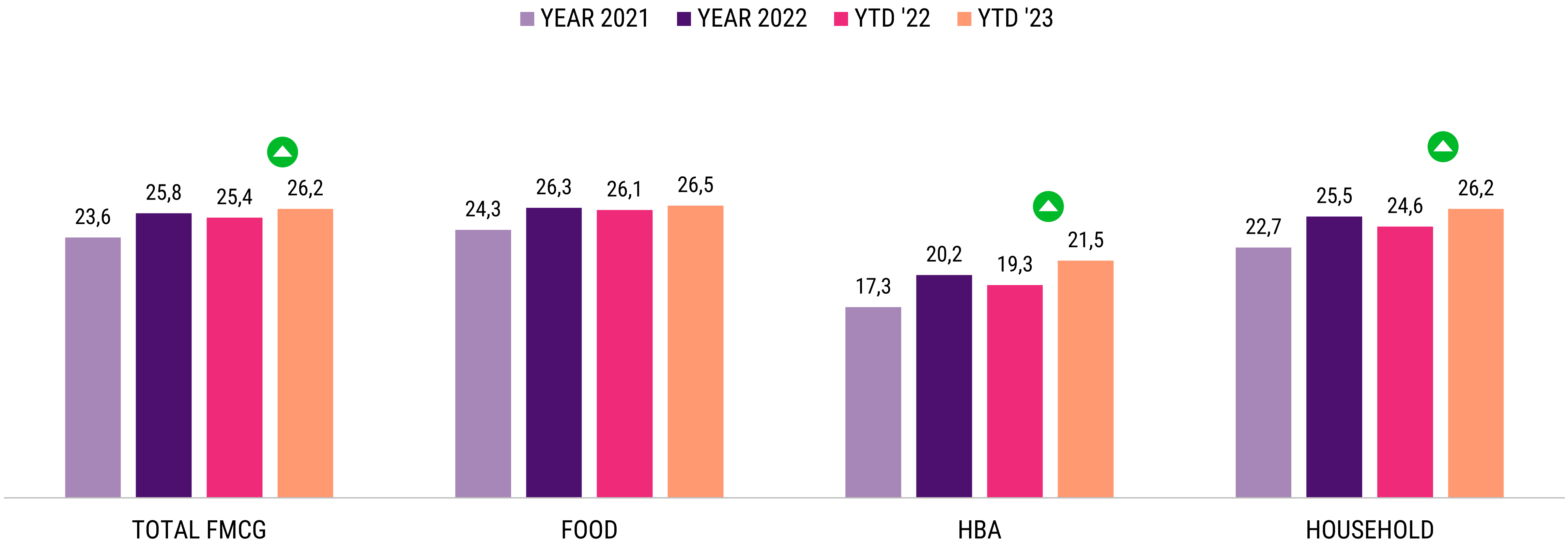
Since 2020, PL increased its Contribution by 2p.p. Moreover in YTD 23 achieve double digit growth



Source: Circana InfoScan, HM/SM , YTD July 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



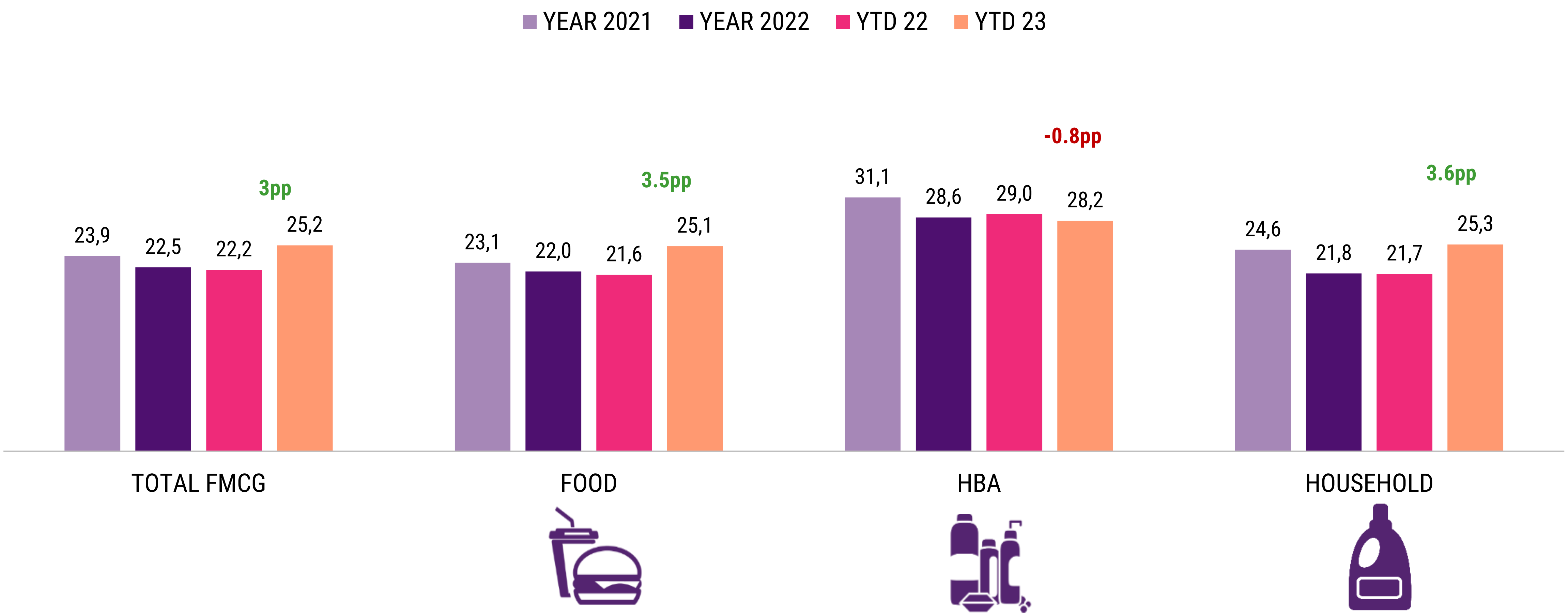
Source: Circana InfoScan, HM/SM, YTD July 23

05

Price Trends & Promo Pressure

%Value Sales due to Temporary Price Reduction

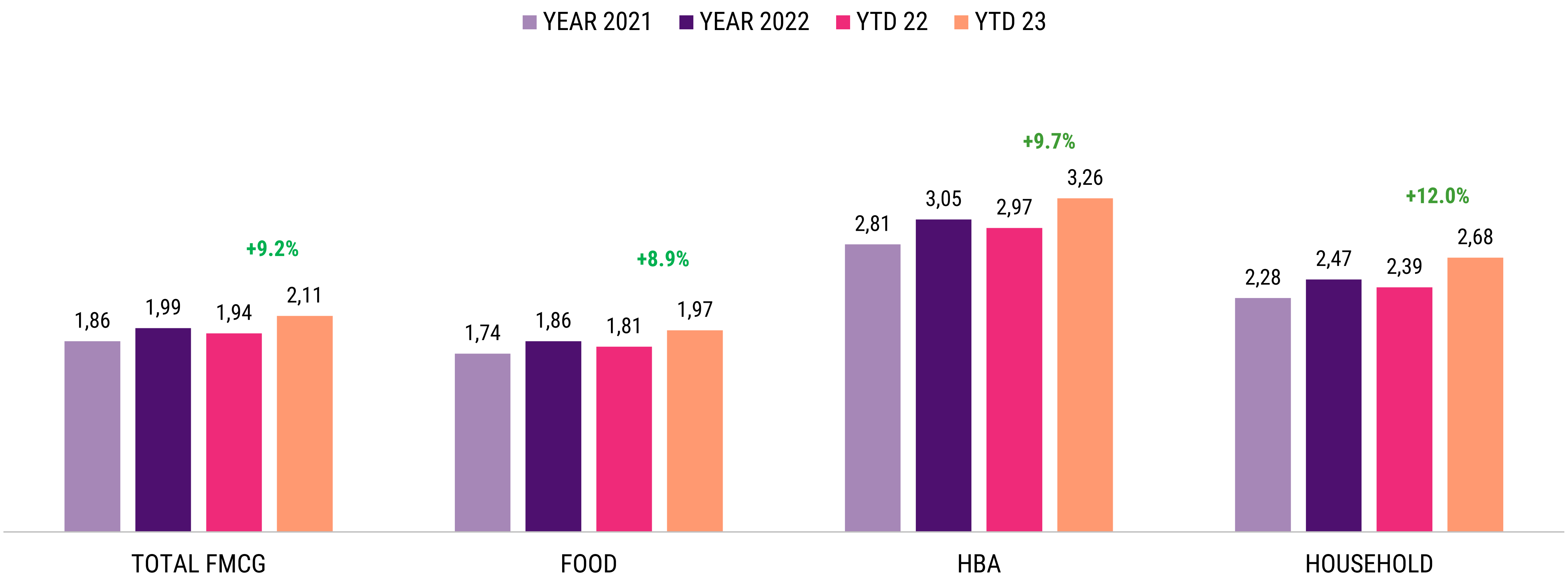
Increased promo intensity for Total FMCG in YTD 23 due to Food & Household



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

Price per Unit per Giga Category

More intense Price increase for Household in YTD 23

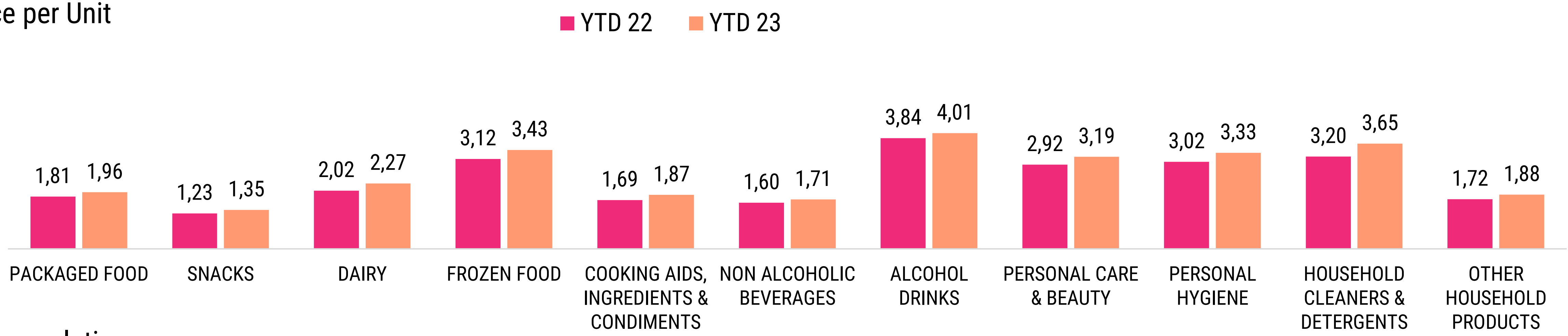


Source: Circana InfoScan, HM/SM , YTD July 23

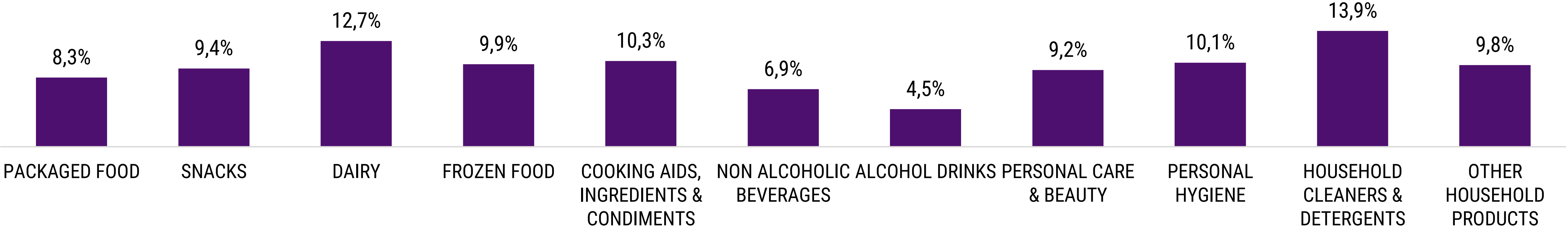
Price per Unit per Category

Regarding Food Categories, Dairy presents the highest price increase in YTD 23

Price per Unit



Price evolution



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

Circana.

Thank you

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