



The Latest Market Trends

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Today's Agenda

- 01 EU & GR Market Insights
- 02 Greek Market Overview
- 03 Latest Data
- 04 Forecasting





01

EU & GR Market Insights

Europe & Greece

Europe

- Euro Area Inflation (2,6%) is at its highest since July '24
- Despite rising inflation, value growth slowed to 1,9% in L52W to Dec
- In the FY '24, across the EU6, units grew at 0,8%
- FY Unit sales grew in key food categories such as Chilled & Fresh (+2,2%), Ambient (+0,8%), Frozen (+1,2%)
- National Brands continue to promote more heavily than Private Labels

Greece

- Greek inflation (2,7%) almost at the same level
- Value growth slowed down in GR as well to 2,6% in '24
- During '24 units grew at 2,8%
- Food categories noted value increase in GR
- National Brands continue to promote, total value sales performed under TPR rose to 25,8%

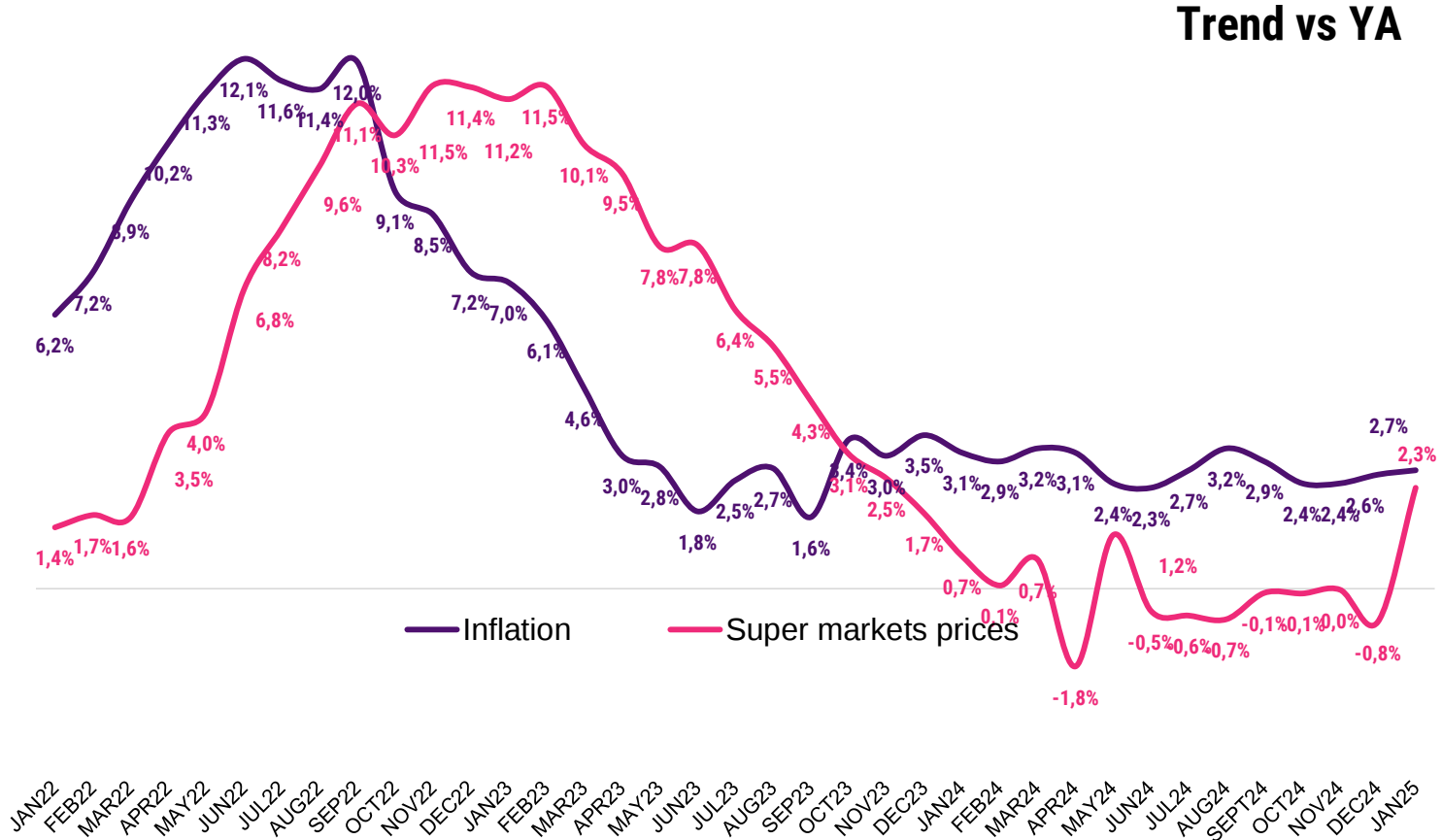
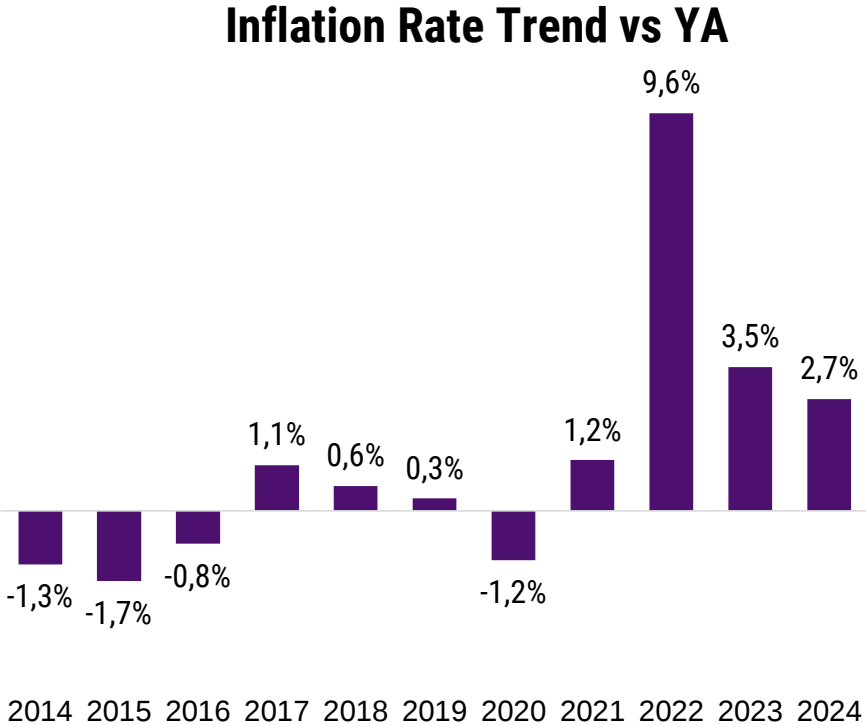
Identifying common market trends



02

Greek Market Overview

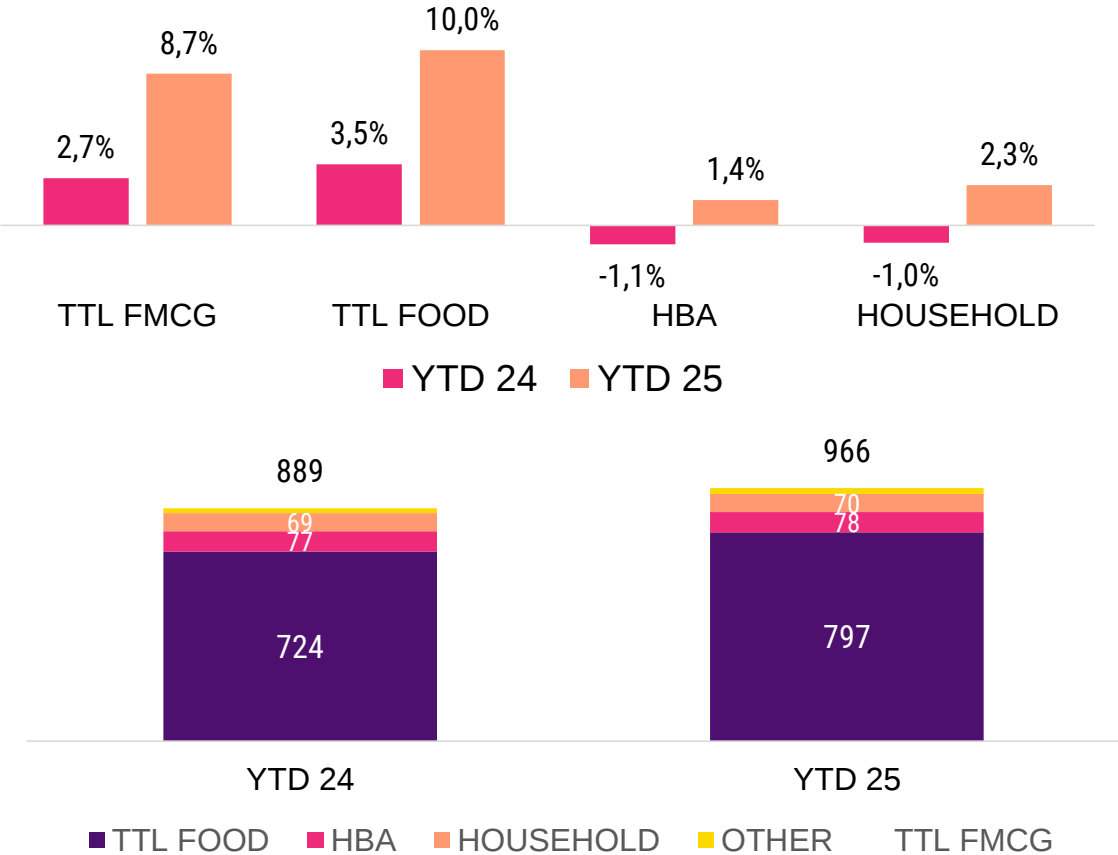
Greek Economy



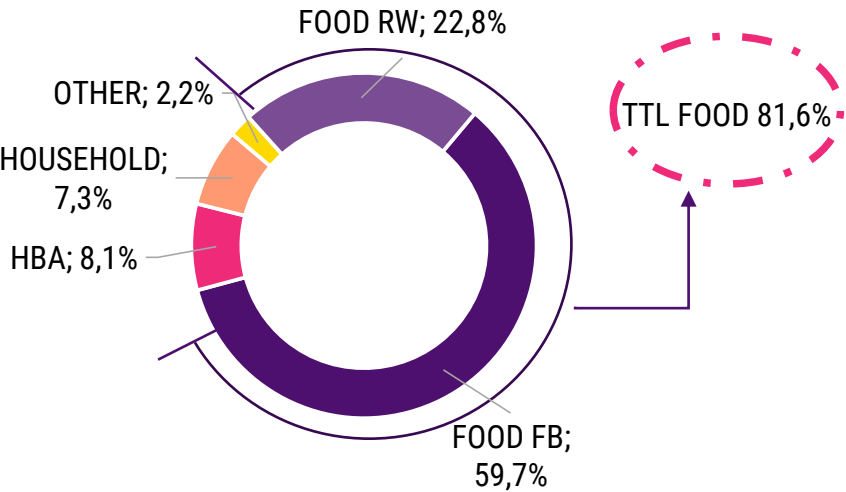
FMCG Value Sales Trend – YTD



Food manages the highest increase in YTD 25



YTD 25 Value Contribution

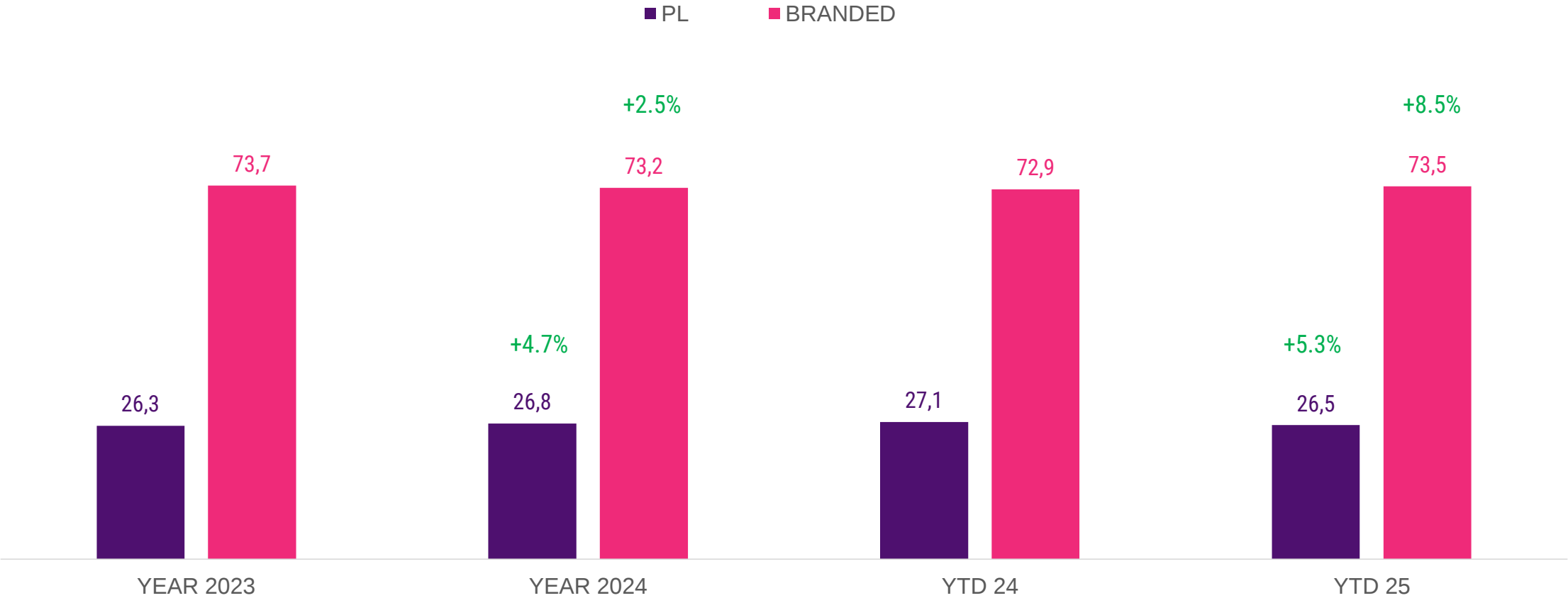


Source: Circana InfoScan, HM/SM + Random Weight, YTD January 25

PL and Branded Value Shares and Trends



More intense increase for Branded Products in January 25



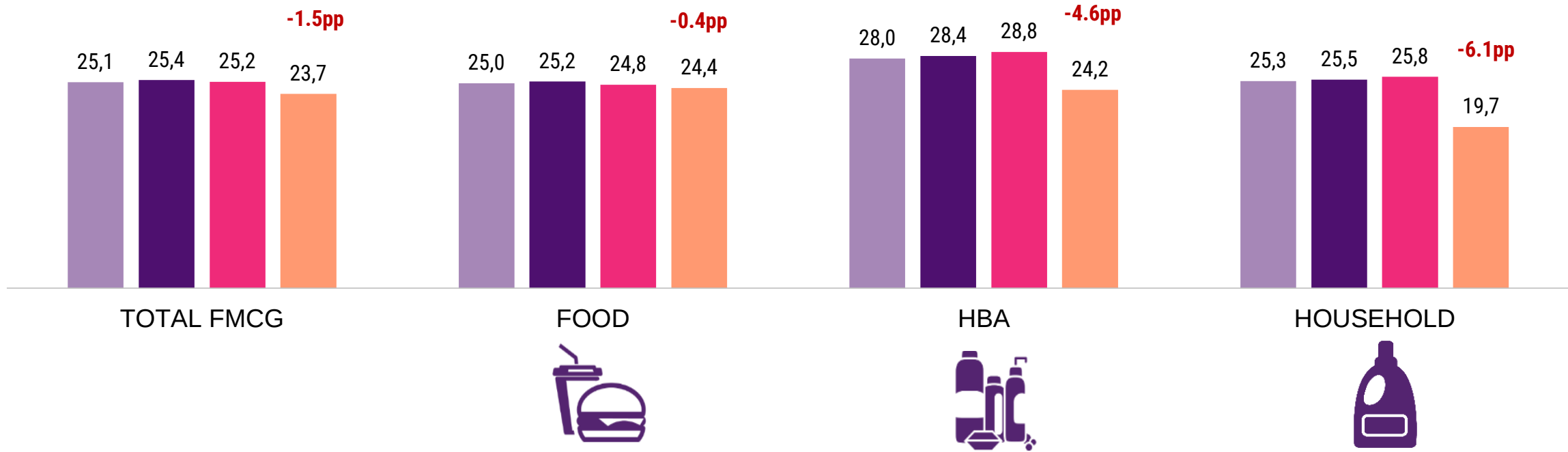
Source: Circana InfoScan, HM/SM , YTD January 25

%Value Sales due to Temporary Price Reduction

Decreased promo intensity for Total FMCG in YTD for all 3 Categories (mainly for Non Food)

■ YEAR 2023 ■ YEAR 2024 ■ YTD 24 ■ YTD 25

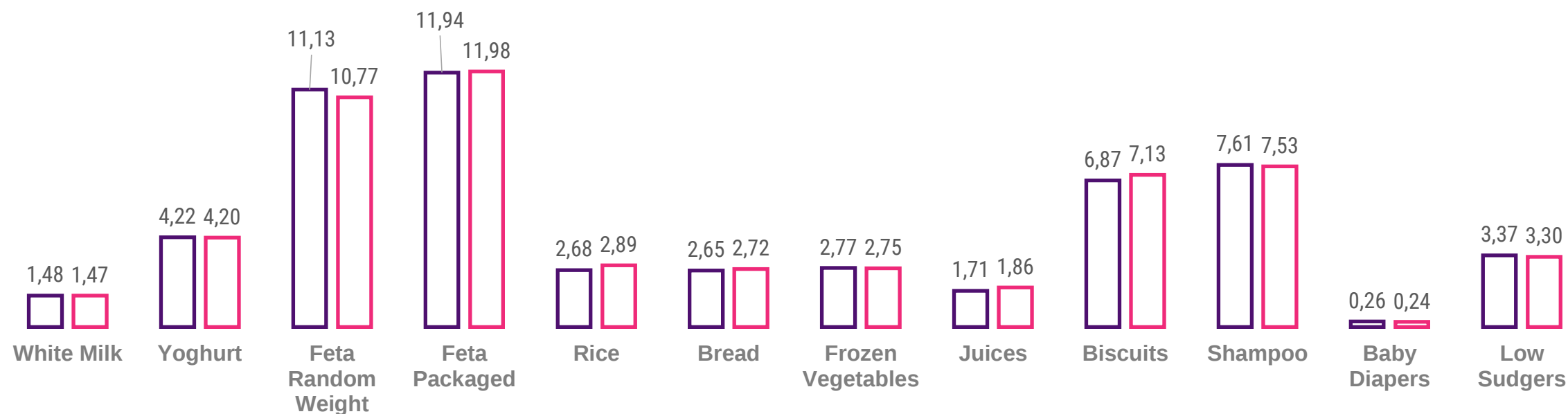
! Incl. Islands



Prices Jan '24 vs Jan '25

Price Per Volume

Jan 2024 Jan 2025





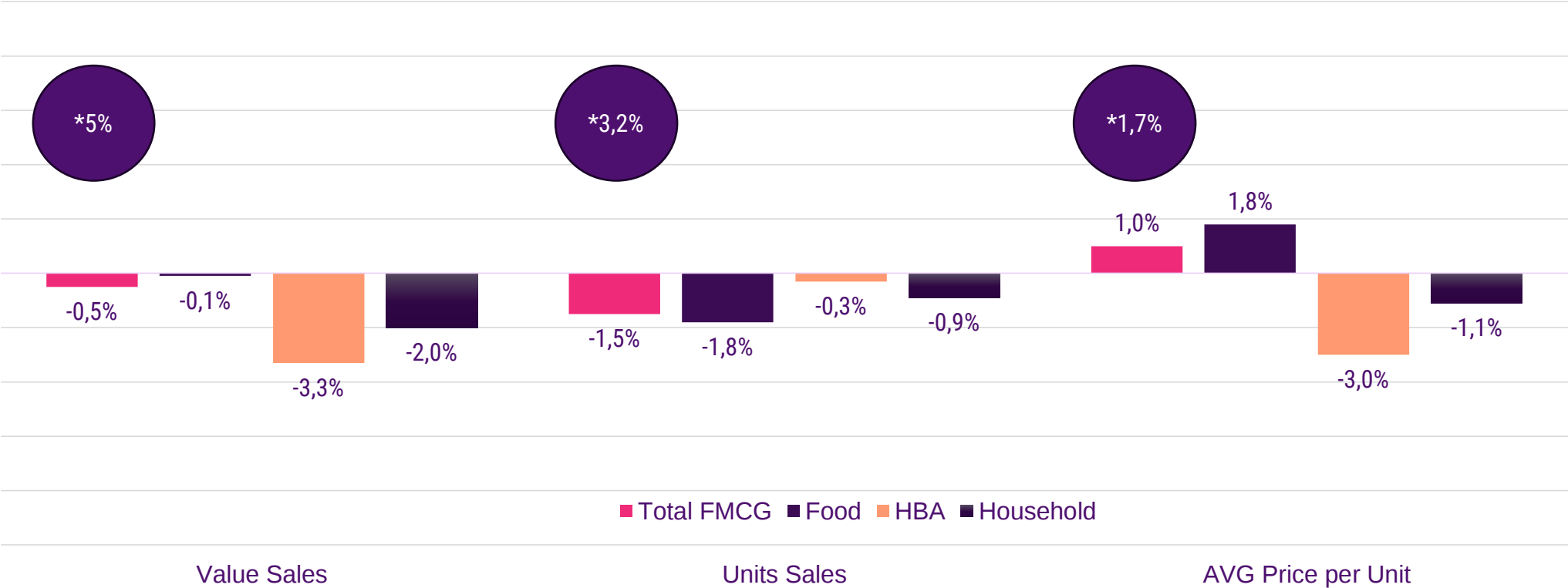
03

Latest Data

February 16, 2025

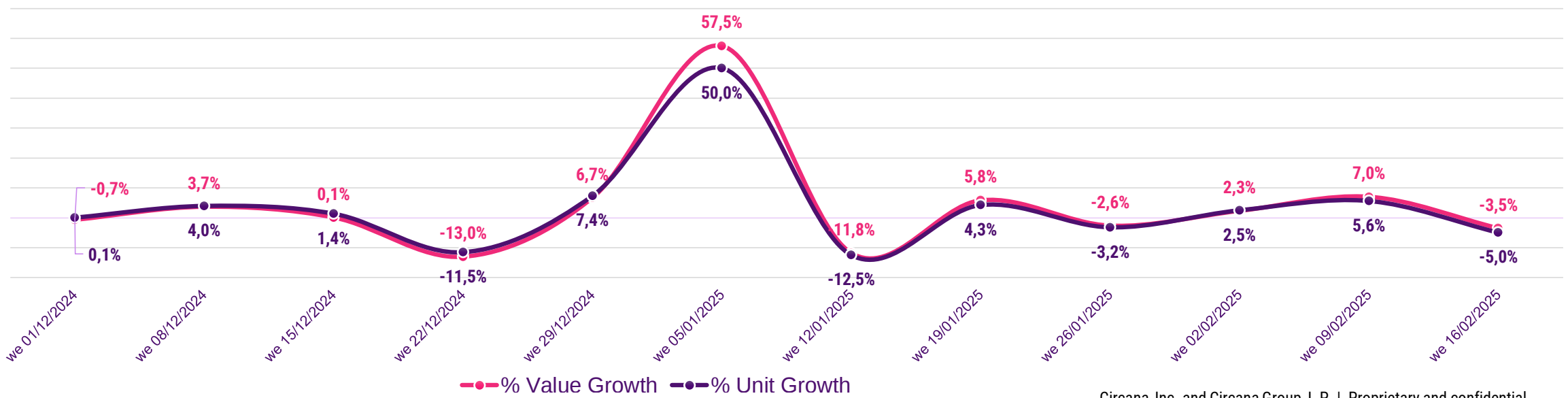
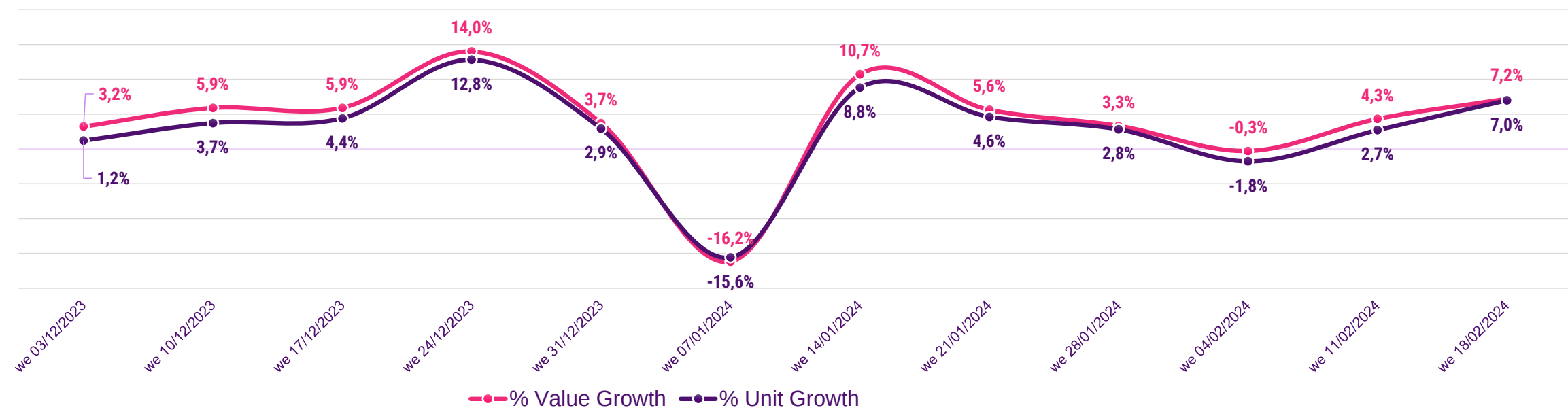
FMCG – YTD % Difference vs Year Ago

Week ending 16/02/2025, excluding the first week of 2025



*Including the 1st week of 2025

Total FMCG – weekly % Difference vs Year Ago – Value and Unit Sales





04

Forecasting

Circana Forecasting



Data Input

- Circana store-level weekly EPOS data – Value, Volume Sales
- Number of stores in Total Greece
- Number of SKUs per Category
- SKUs distribution and assortment changes
- Average price
- Promoted volume – VOD, Promo activities (features, displays, TPR)
- Seasonal holidays, seasonal local events (Easter, Xmas, Holy Spirit etc)
- Temperature
- Macro-economic factors (CPI, GDP, unemployment, income, etc)



Product

- All fixed barcodes of total categories.
- Forecast at any product level like SKU, brand, segment or total category



Time Period

- Historical Period data:
 - January 2022 – December 2024
- Forecasted Period:
 - Monthly 2025

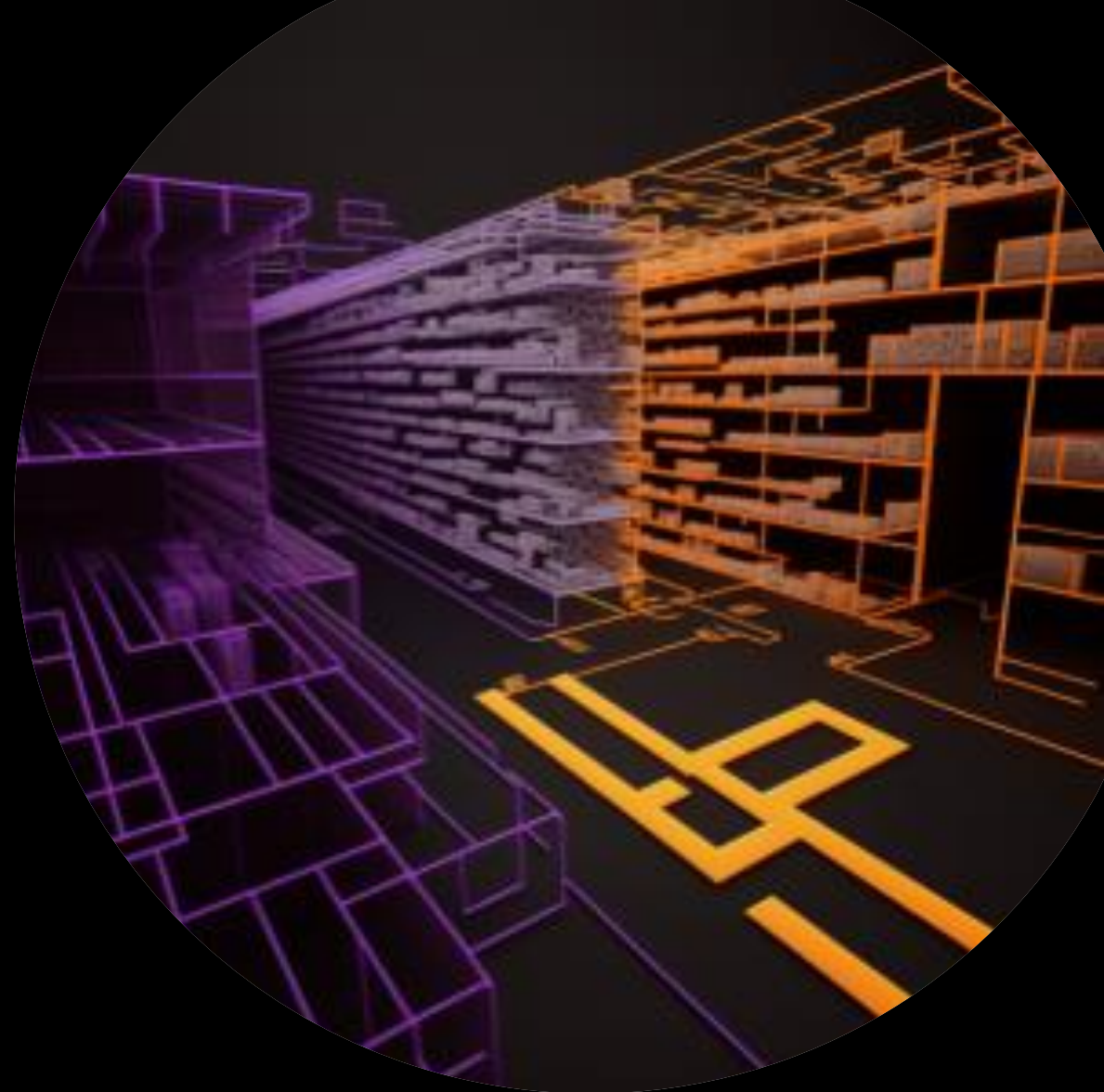


Geographical Coverage

- Total Greece store level ~ 2.4k distribution points with 2 or more cashiers
- National and/or Retailer level

Forecasting FMCG

Scenario	Price Increase %	Value Sales Evolution %
Scenario 1	1,8	3
Scenario 2	2,9	3,2



Forecasting Food

Scenario	Price Increase %	Value Sales Evolution %
Scenario 1	3,3	3,8
Scenario 2	4,7	4,1



Forecasting HBA

Scenario	Price Increase %	Value Sales Evolution %
Scenario 1	1,3	-2,9
Scenario 2	2,2	-1,7



Forecasting Household

Scenario	Price Increase %	Value Sales Evolution %
Scenario 1	1,6	-1,6
Scenario 2	2,8	-1,4



Thank you

