



MARKET VIEW YTD January 26

Trends for the Greek FMCG environment



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 + Islands

02 CHANNELS

Super/Hyper Markets

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

04 PERIODS

YR 2025 vs YR 2024

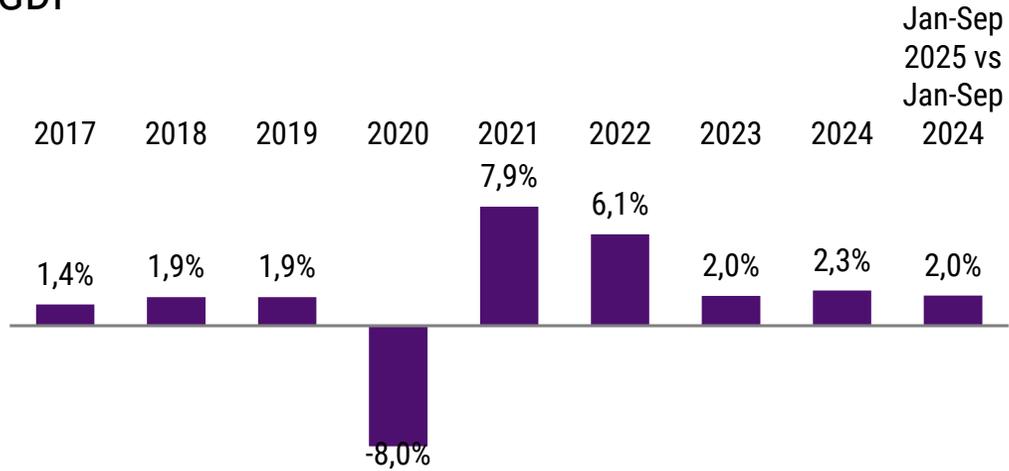
YTD January 2026 vs YTD January 2025

01

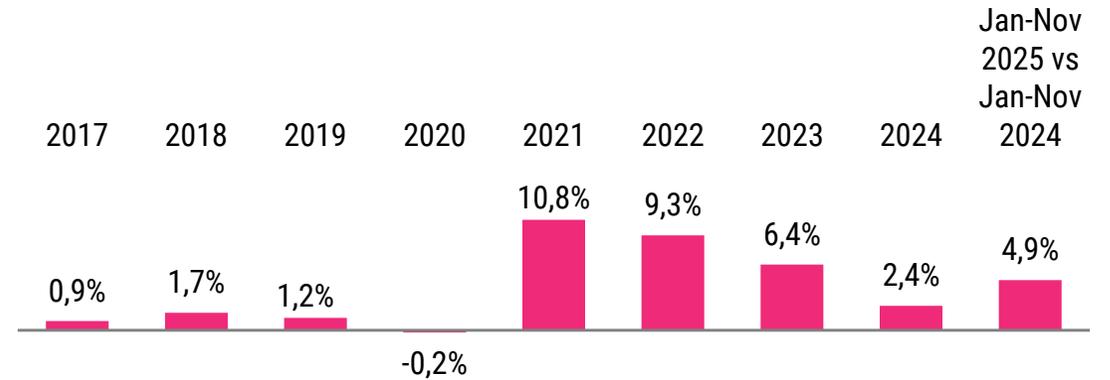
Greek Economy

Greek Economy

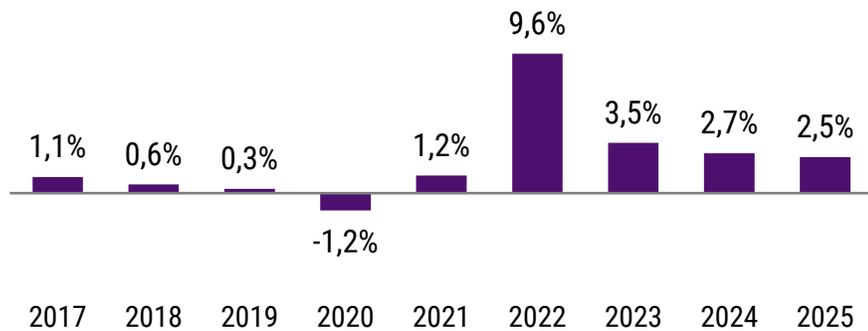
GDP



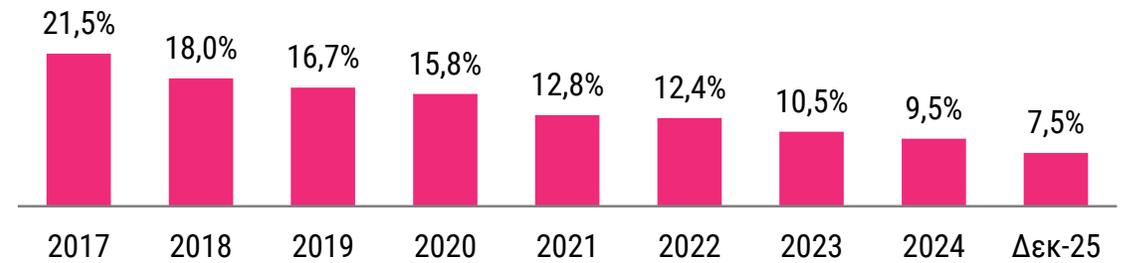
RETAIL TURNOVER INDEX (w.o AUTOMOTIVE FUEL)



INFLATION RATE TREND



UNEMPLOYMENT





02

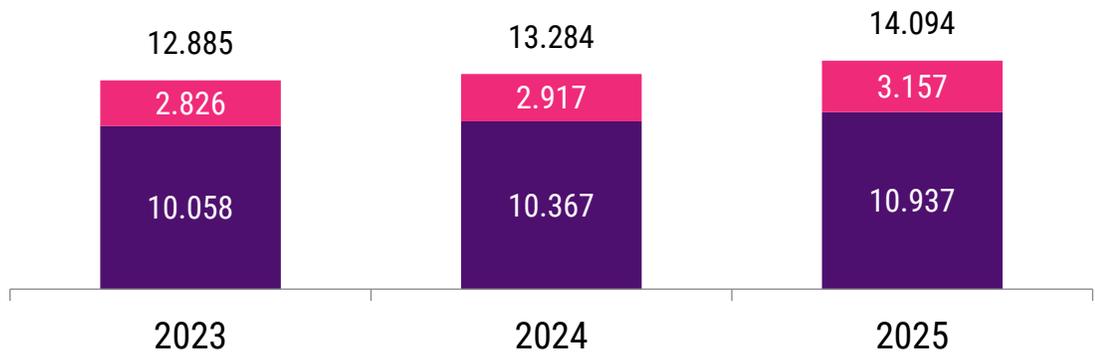
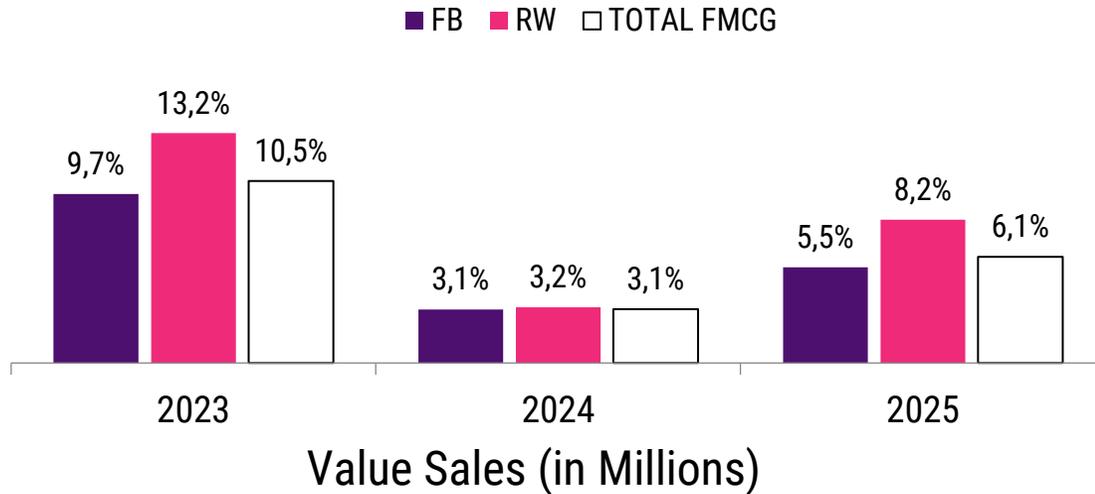
Trends for FMCG Market

Fixed Barcodes + Random Weight

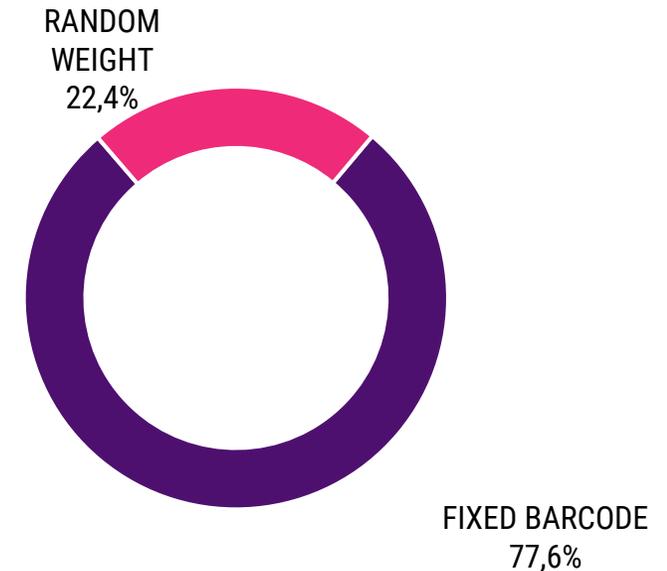
FMCG Value Sales Trend – Year 2025



Growth by 6.1% for Total FMCG Market in 2025, coming from both Segments



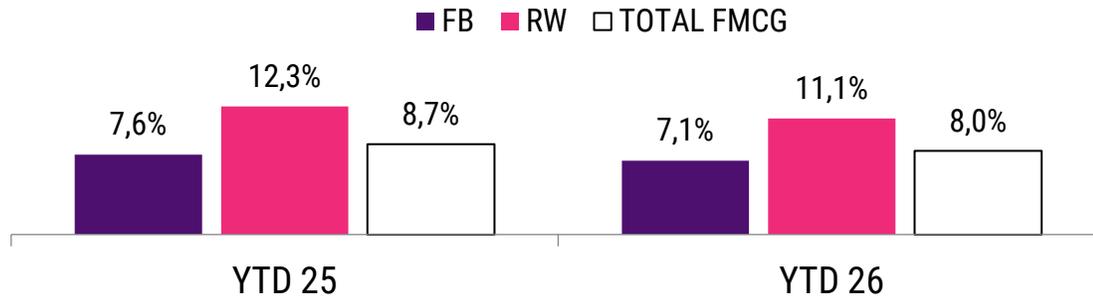
2025 Value Contribution



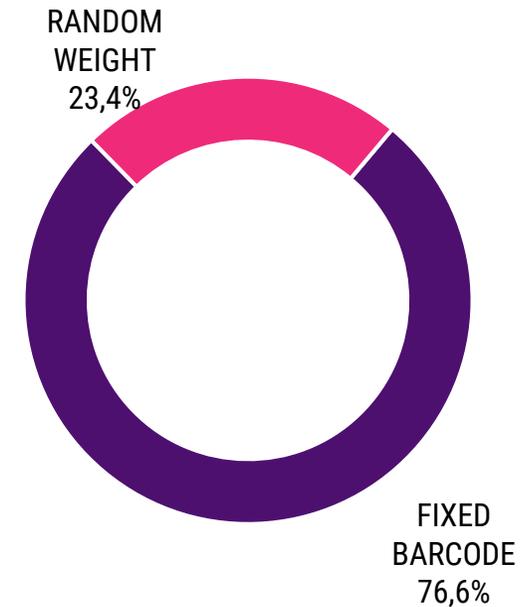
FMCG Value Sales Trend – YTD



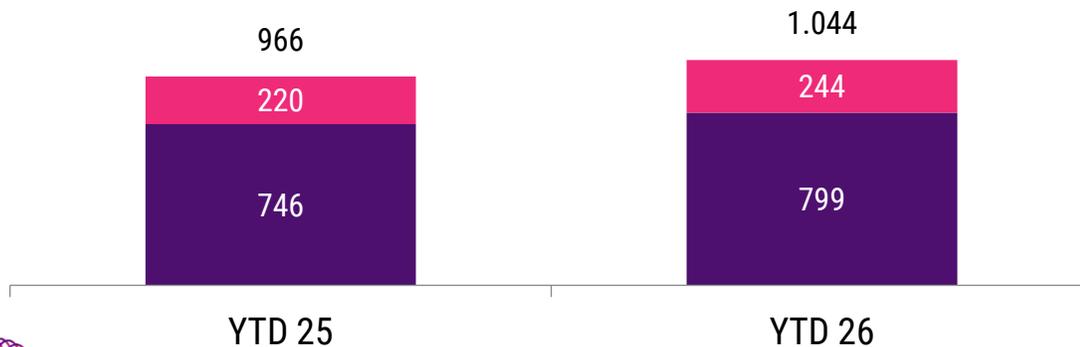
Increase for Total FMCG in January 26 (+8.0%) due to both Segments (more intense for RW)



YTD 26 Value Contribution



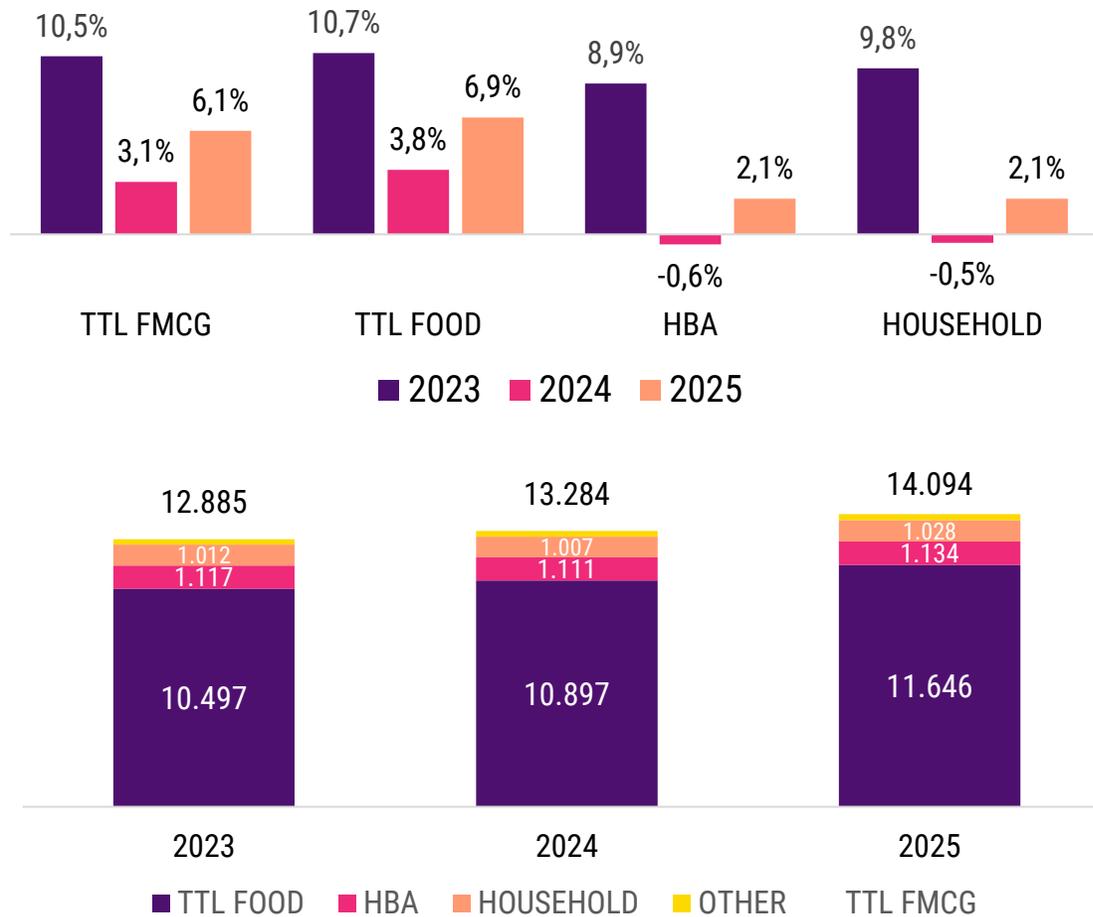
Value Sales (in Millions)



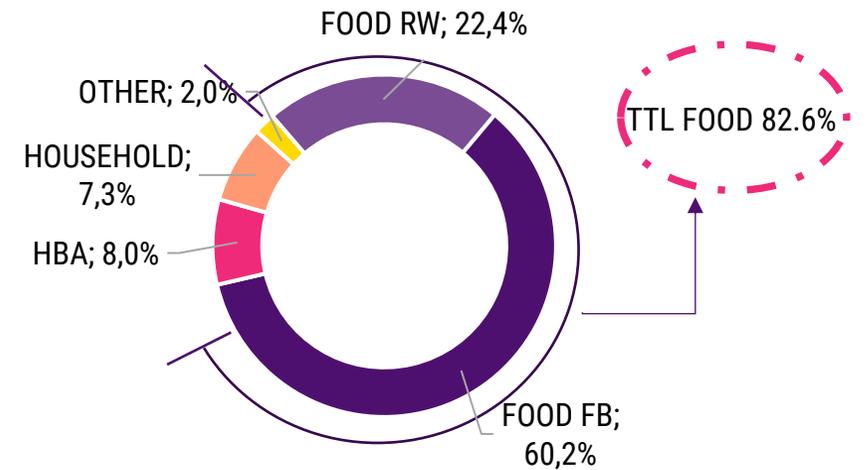
FMCG Value Sales Trend – Year 2025



Food contributed in a more intense way to Total FMCG growth in Year 2025



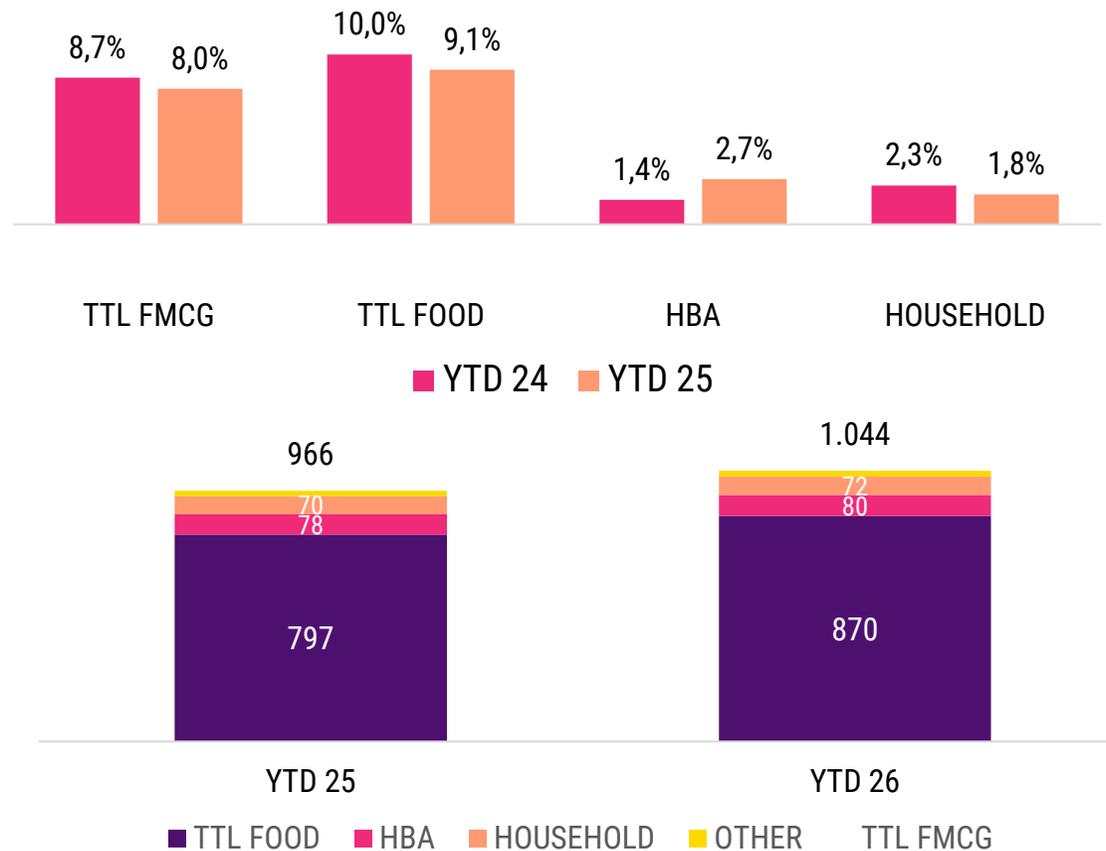
2025 Value Contribution



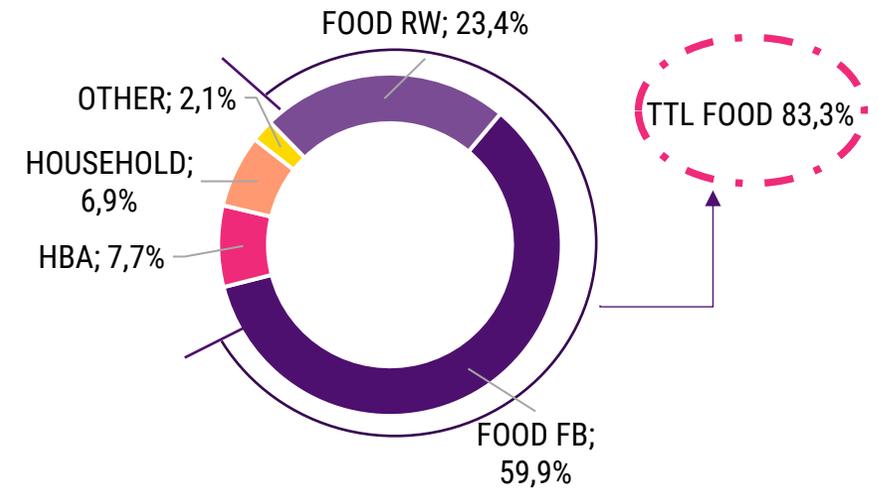
FMCG Value Sales Trend – YTD



Food manages the highest increase in January 26



YTD 26 Value Contribution





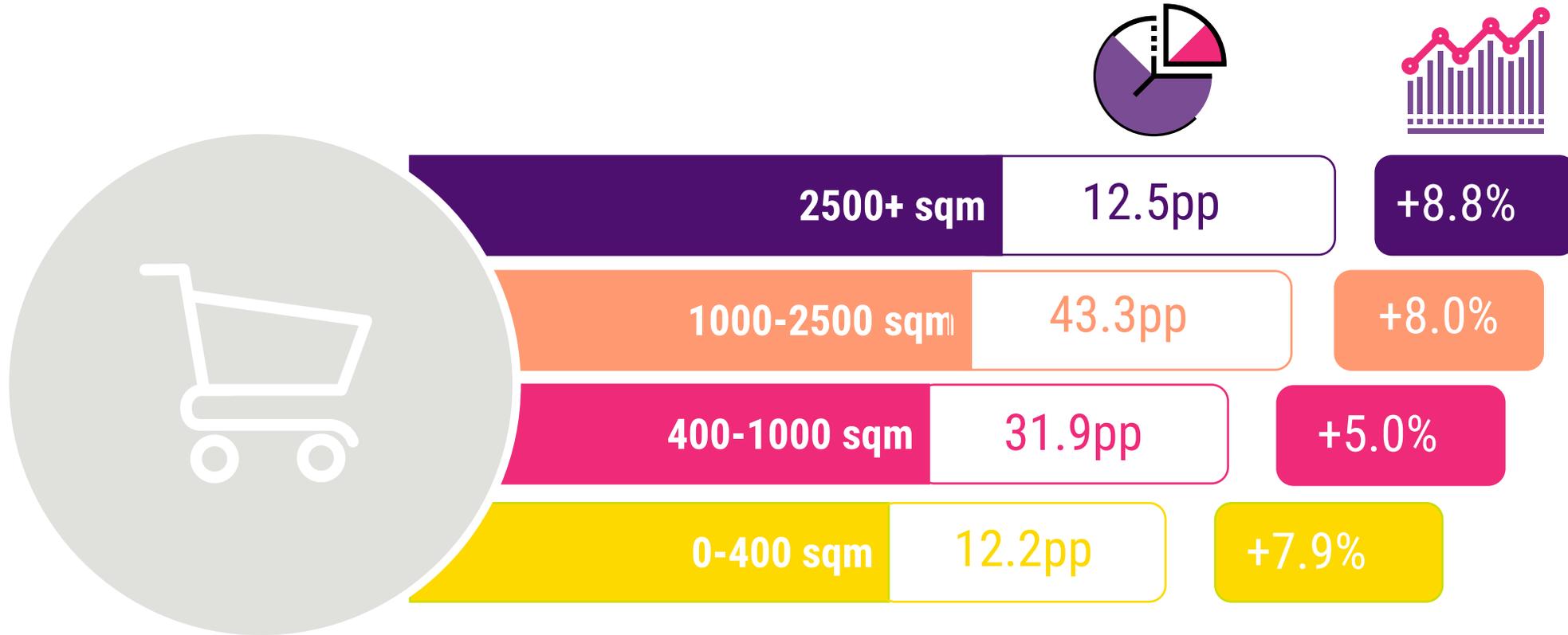
03

Trends for FMCG Market

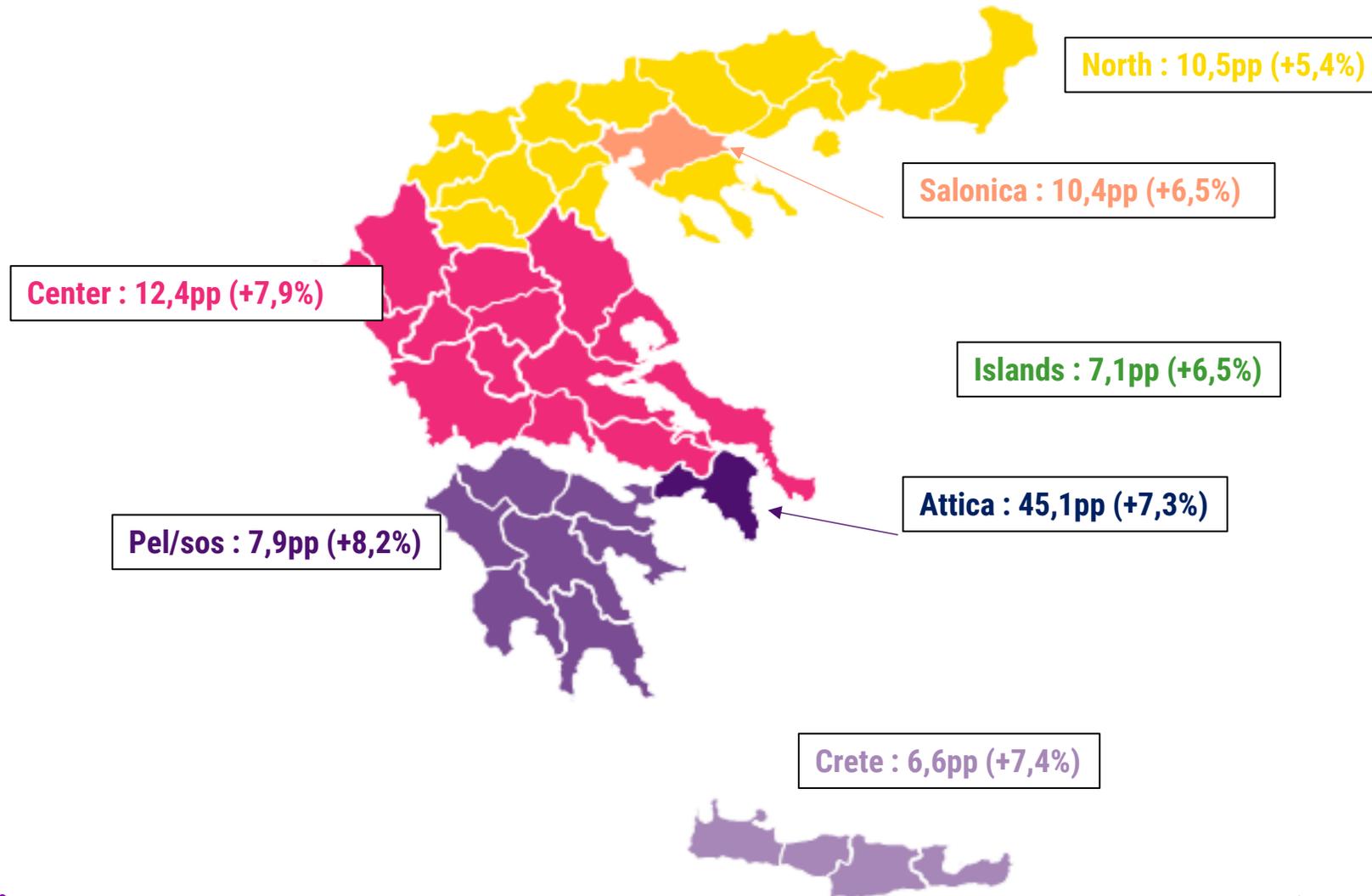
Fixed Barcodes

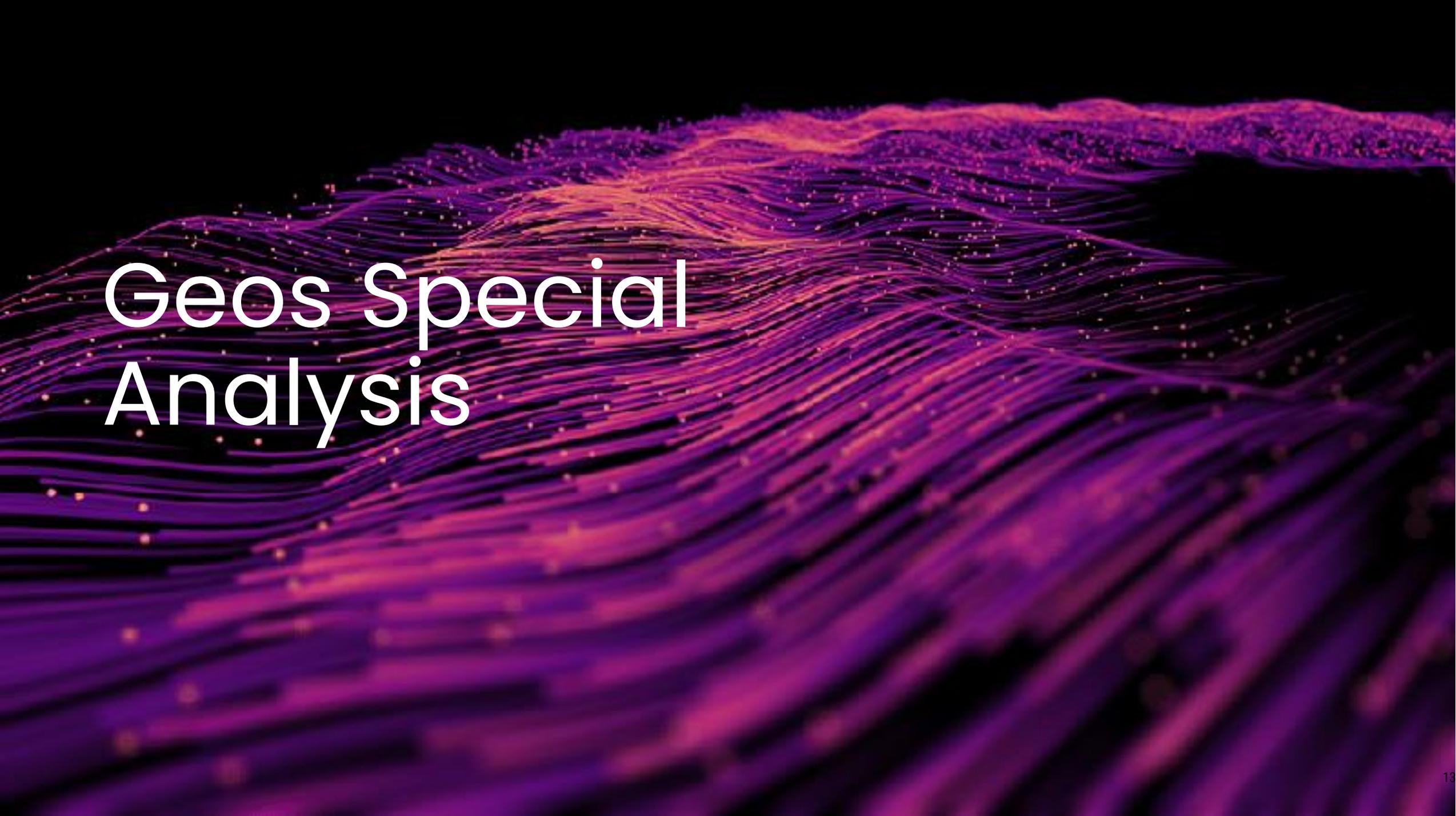
FMCG Value Sales Trends per Store Type YTD

All Shop Types achieve growth during January 26, more intense for Hyper



FMCG Value Sales Trends per Geo YTD

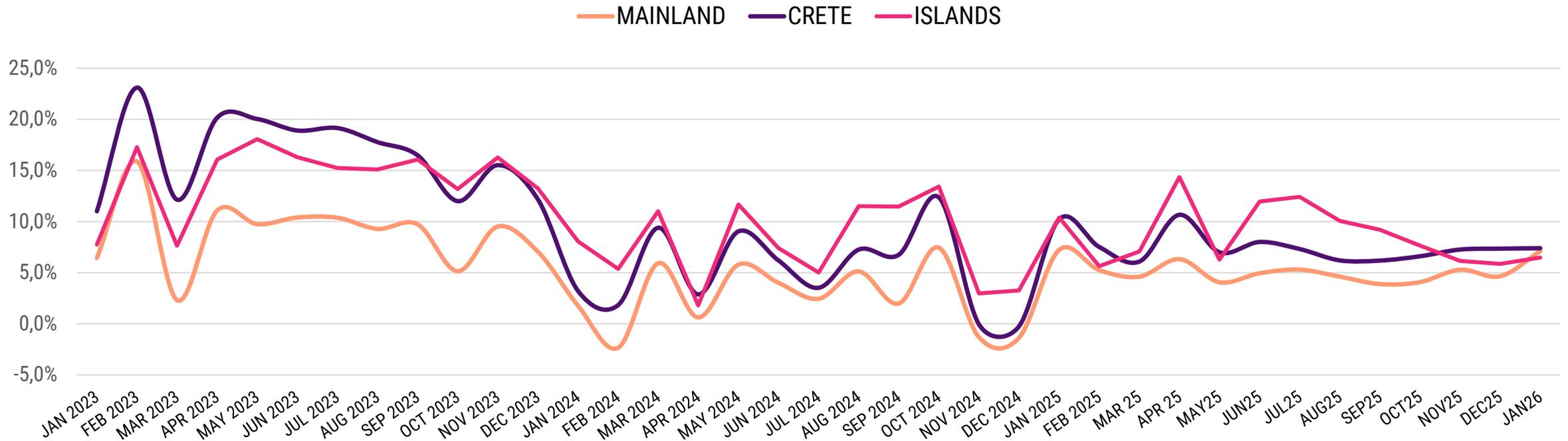




Geos Special Analysis

FMCG Monthly Value Growth

Almost equal growth for the three Geos during January 26



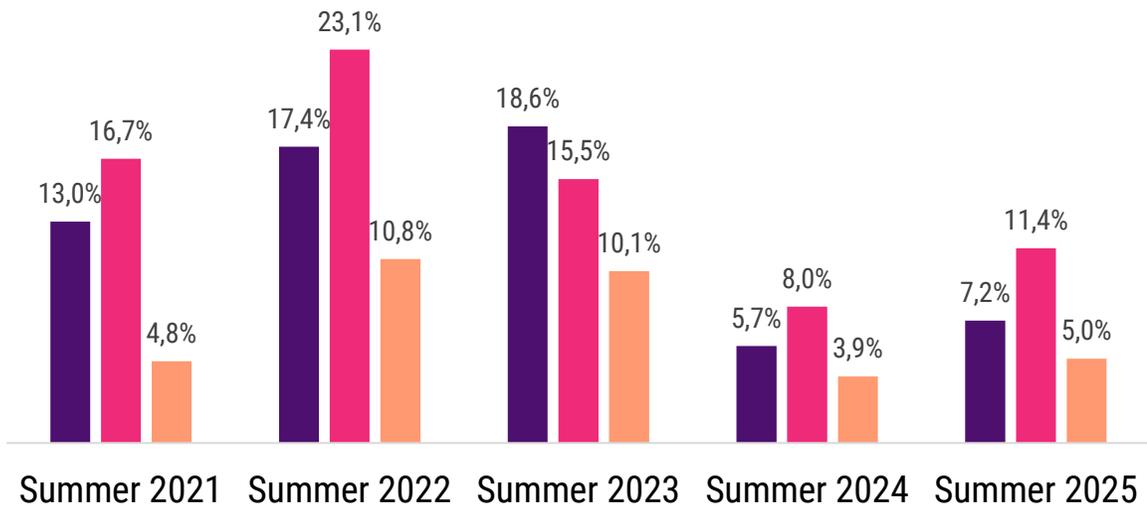
FMCG Value Growth during Summers



Intense growth during Summers for Islands and Crete

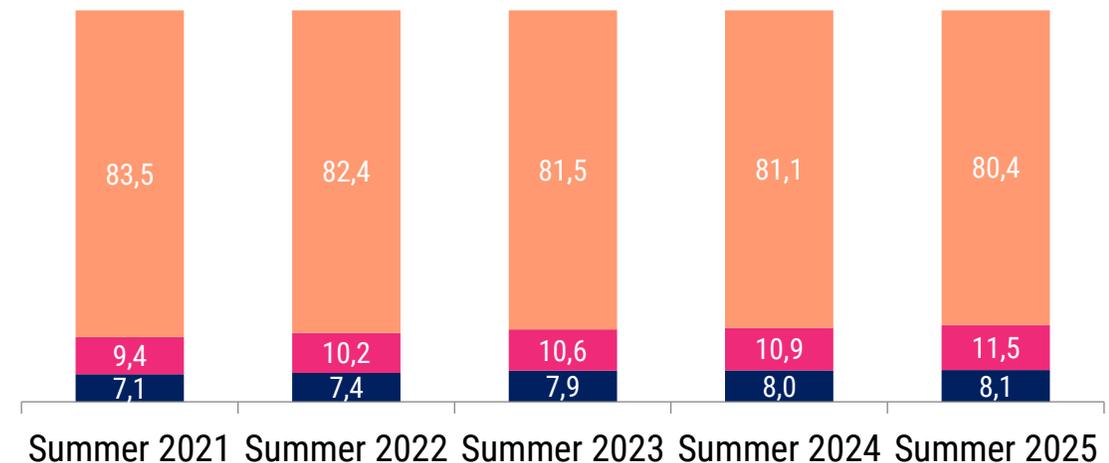
Value Growth

■ CRETE ■ ISLANDS ■ MAINLAND



Value Contribution

■ CRETE ■ ISLANDS ■ MAINLAND



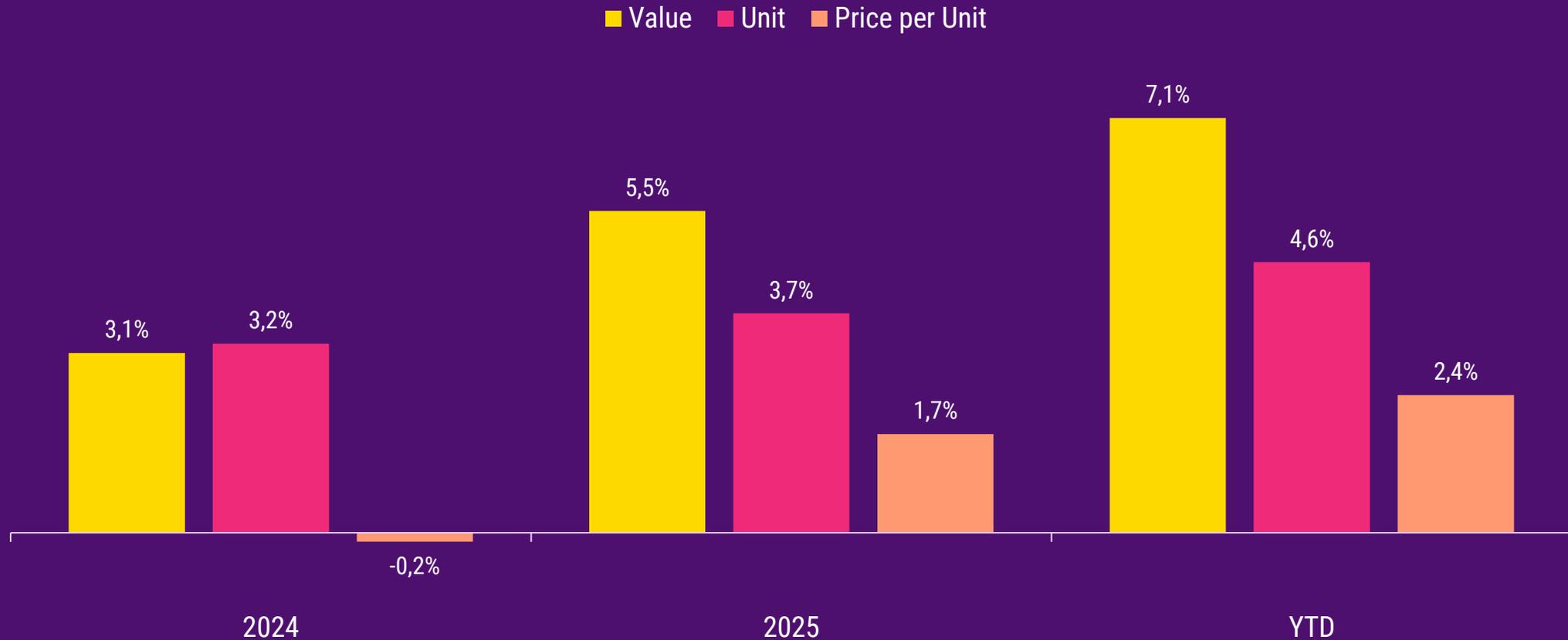
The background features a complex, abstract pattern of wavy, overlapping lines in shades of purple and orange. These lines are set against a dark, almost black background, creating a sense of depth and movement. Small, glowing particles or dots are scattered throughout the pattern, adding to the intricate texture.

Price Analysis

FMCG Price Trends



More intense increase in Value during January 26

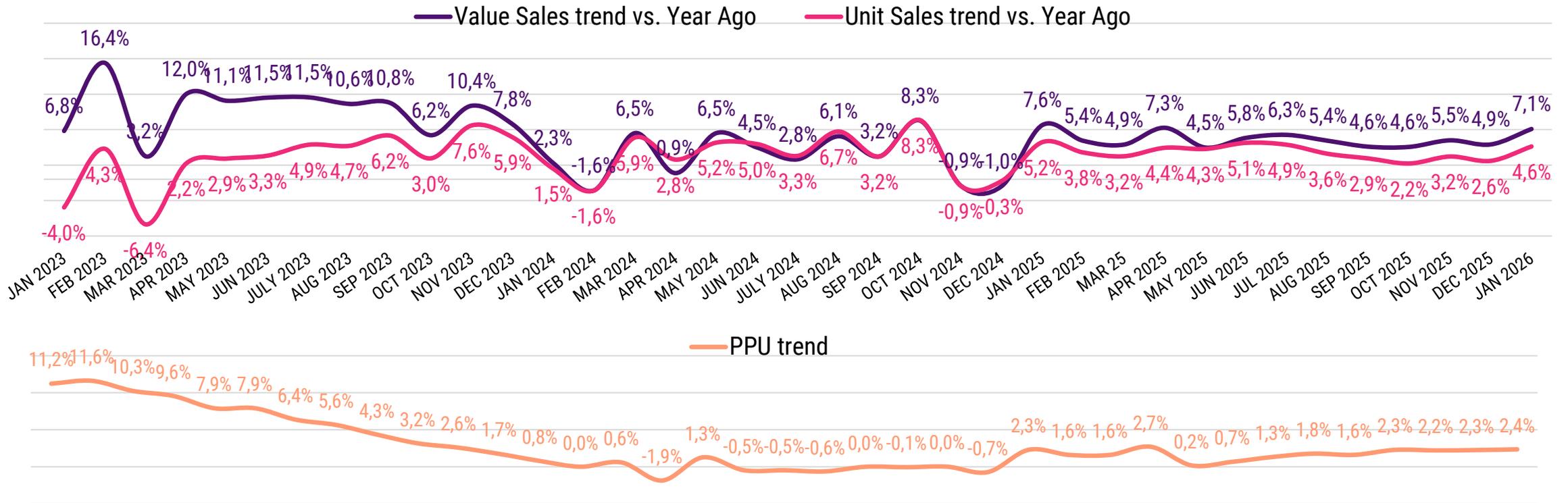


FMCG Value and Unit Monthly Trends



Price per Unit increase in January 26

YR 2024: +3.1%
YR 2025: +5.5%
YTD 2026: +7.1%





04

Giga Categories Evolution

Giga Categories Value Sales Trend



Food manages the highest increase during January 26

YTD 2026



+8.4%



+2.7%



+1.8%

Food

Health & Beauty

Household

2025



+6.4%



+2.1%



+2.1%

Giga Categories Unit Sales Trend



Slower growth rate for Food Unit Sales, compared to its Values in January 26

YTD 2026



+4.9%



+1.8%



+2.8%

Food

Health & Beauty

Household

2025



+3.8%



+3.3%



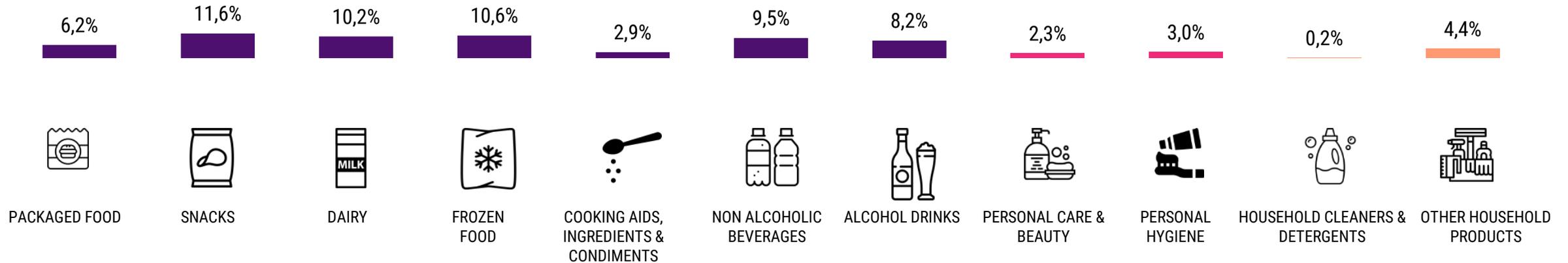
+2.6%

Categories Value Sales Trend YTD

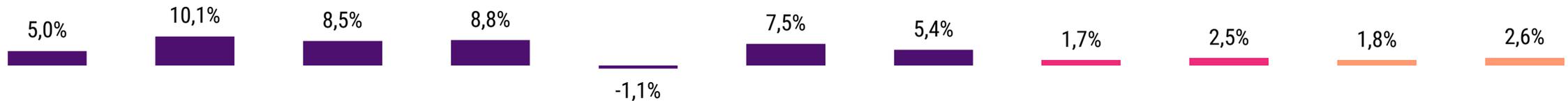


More intense growth for Snacks, Frozen, Dairy and Beverages & Drinks in January 26

Value Sales Trend YTD 2026



Value Sales Trend 2025

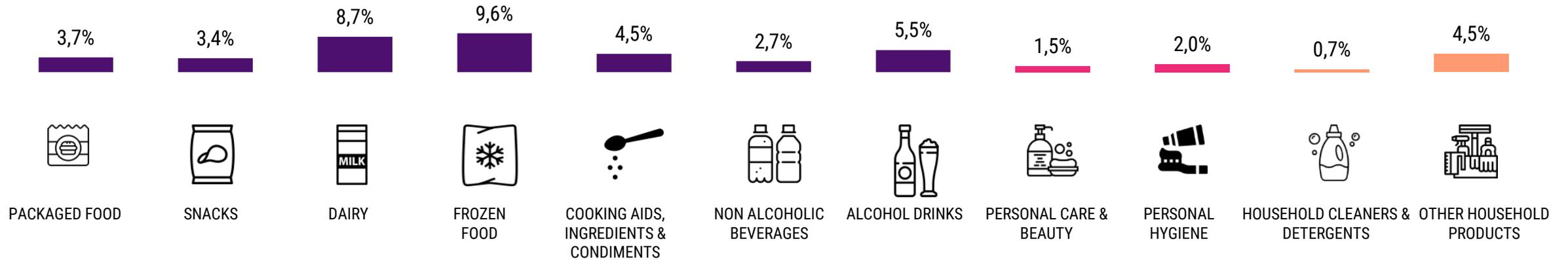


FMCG Unit Sales Trend YTD

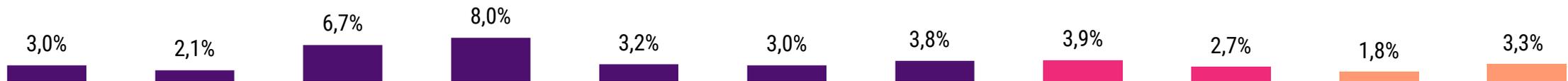


Cooking Aids achieve higher growth rate of Unit Sales compared to its Values

Unit Sales Trend YTD 2026



Unit Sales Trend 2024





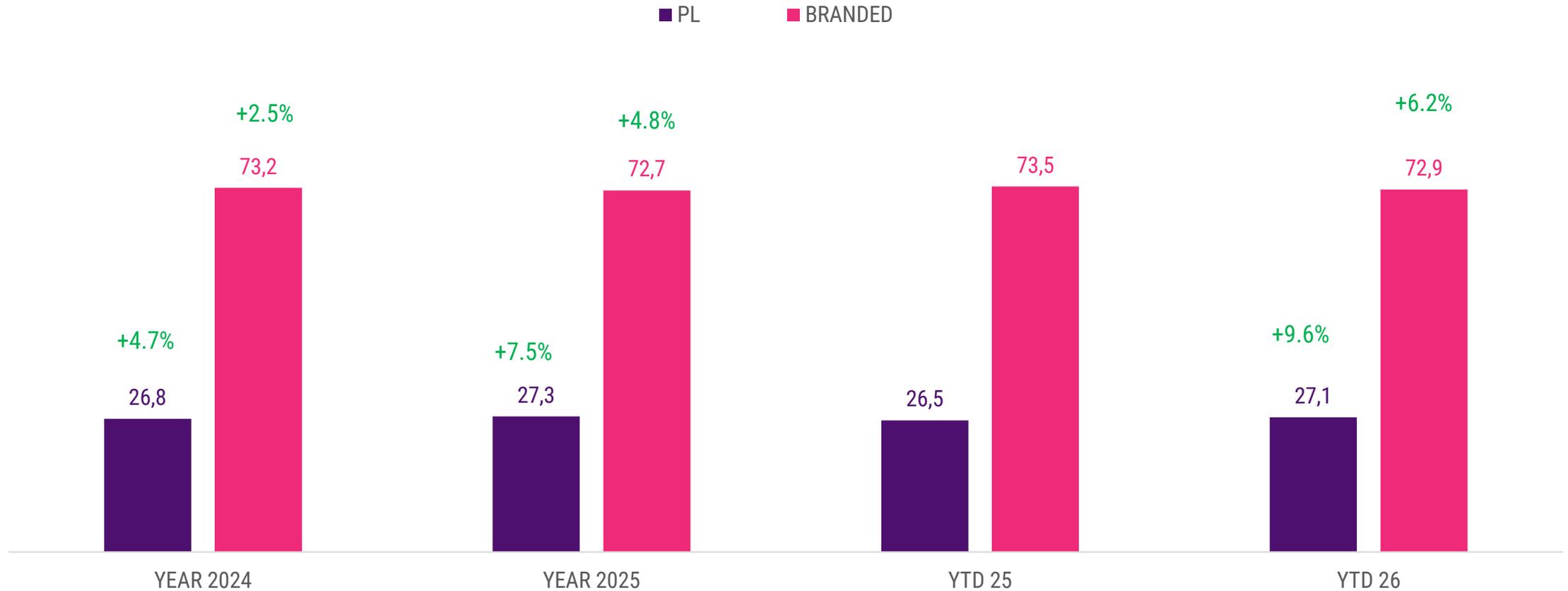
05

Evolution of Private Labels

PL and Branded Value Shares and Trends



PL continue with higher growth rate than Branded in January 26

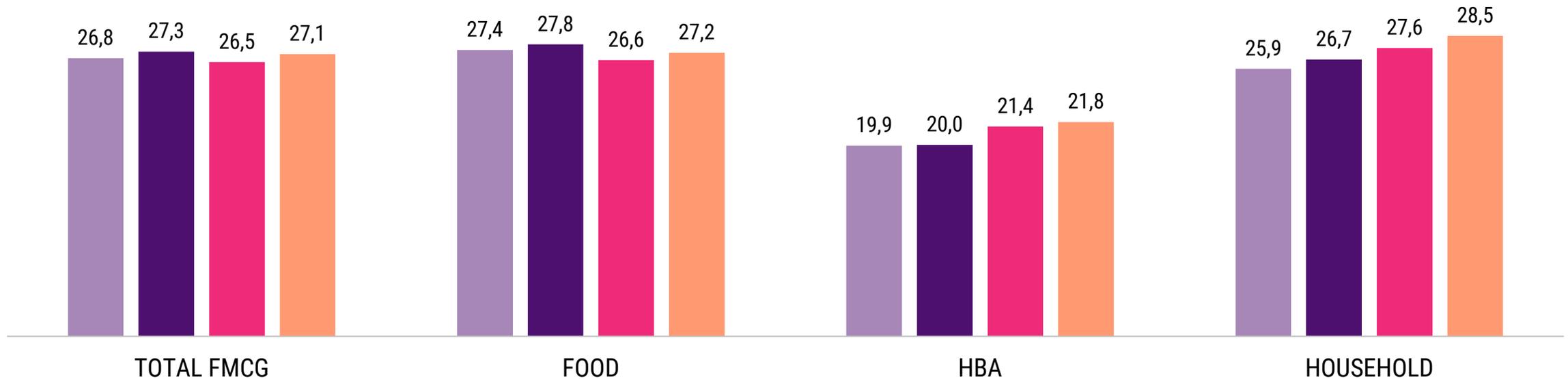


PL Value Share per Giga Category



Value Share increase for all 3 giga categories in January 26

■ YEAR 2024 ■ YEAR 2025 ■ YTD 2025 ■ YTD 2026





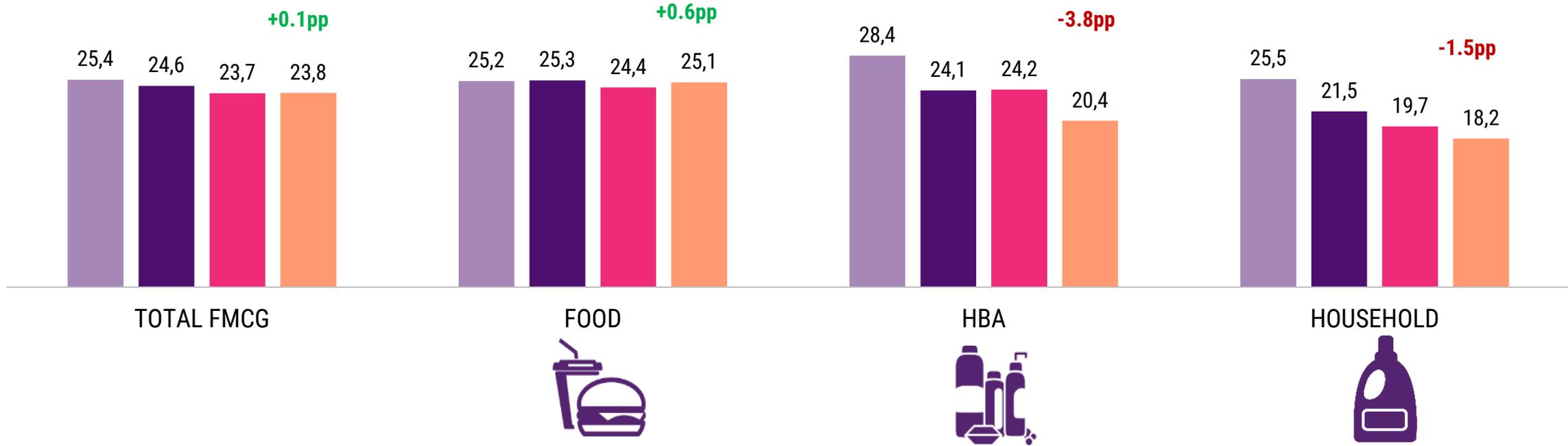
06

Price Trends & Promo Pressure

%Value Sales due to Temporary Price Reduction

Decreased promo intensity for Non Food in January 26

■ YEAR 2024 ■ YEAR 2025 ■ YTD 2025 ■ YTD 2026

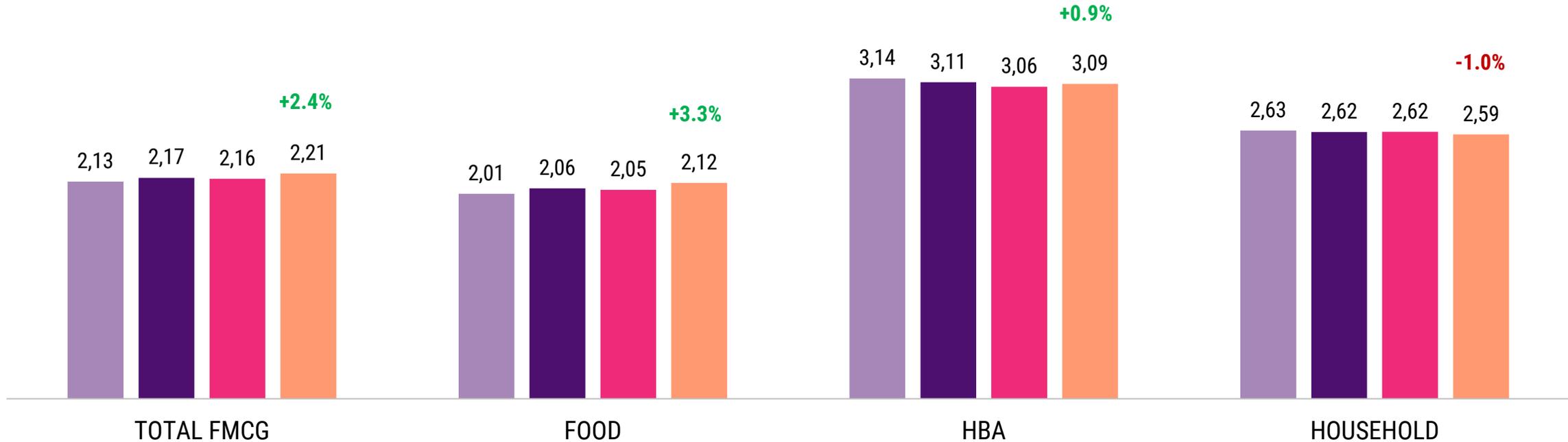


Price per Unit per Giga Category



Price increase for Food influences total FMCG in January 26

■ YEAR 2024 ■ YEAR 2025 ■ YTD 25 ■ YTD 26

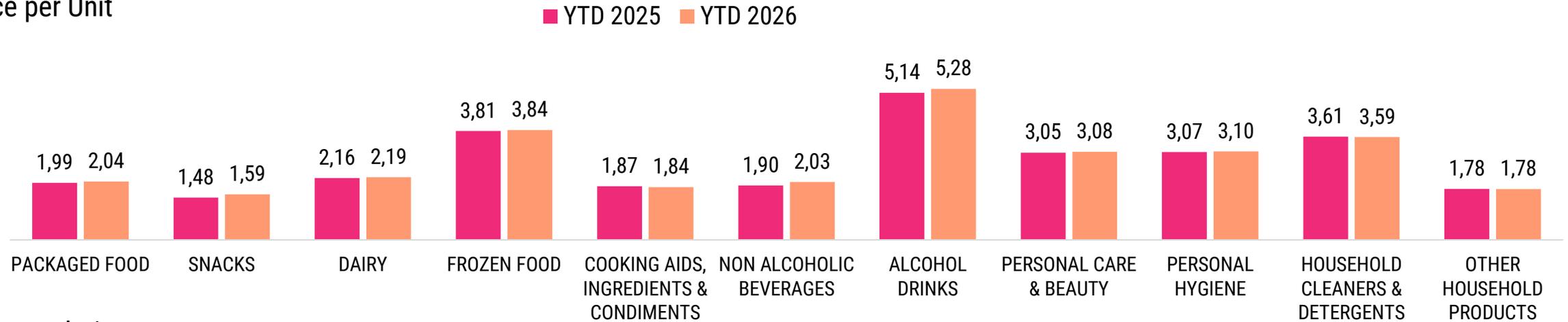


Price per Unit per Category

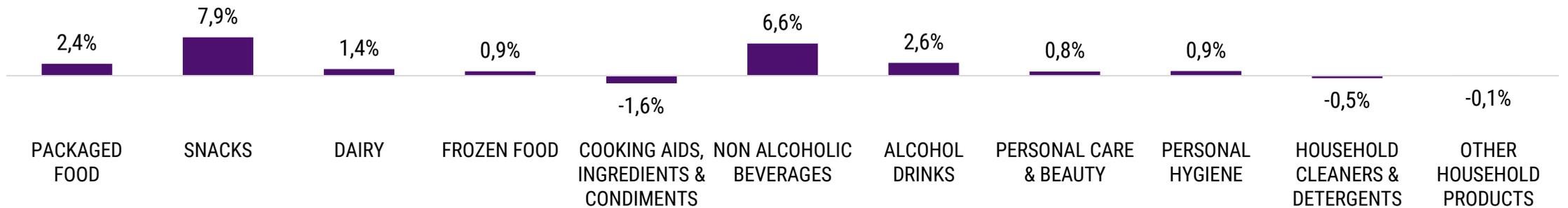


Intense price increase for Snacking and Non Alcohol during January 26

Price per Unit



Price evolution





07

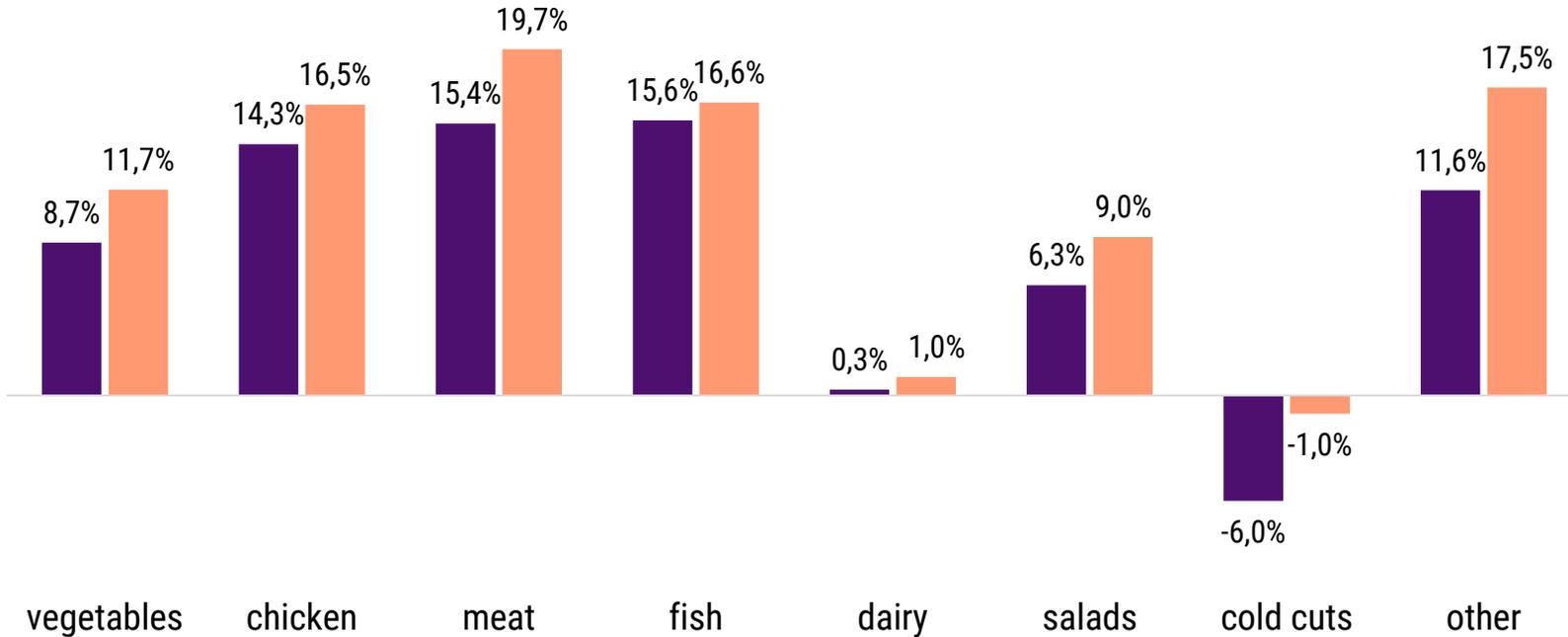
Random
Weight
Categories

Random Weight Value Sales Trend

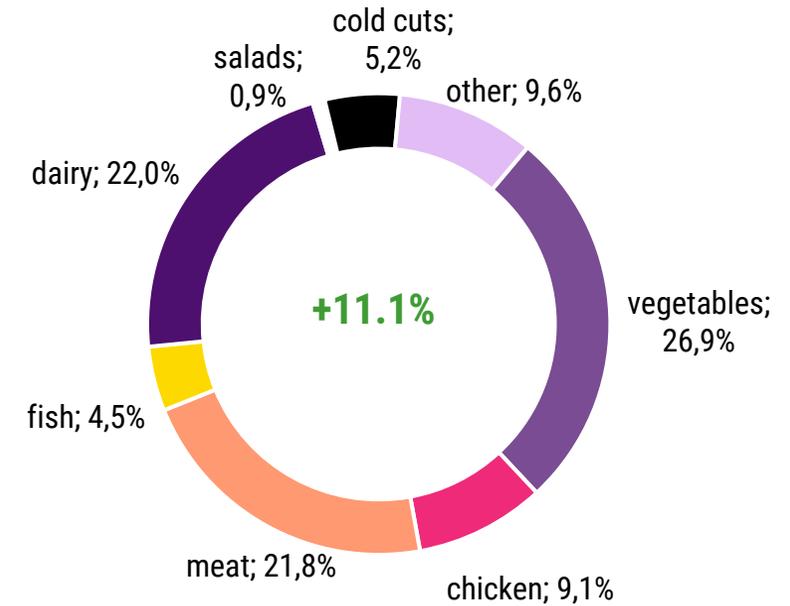
Intense Value Growth during January 26 for Random Weight Products



■ 2025 ■ YTD 26



YTD 2026 Contribution





08

Online Grocery Trends Report

eRetail Audit Panel Turnover

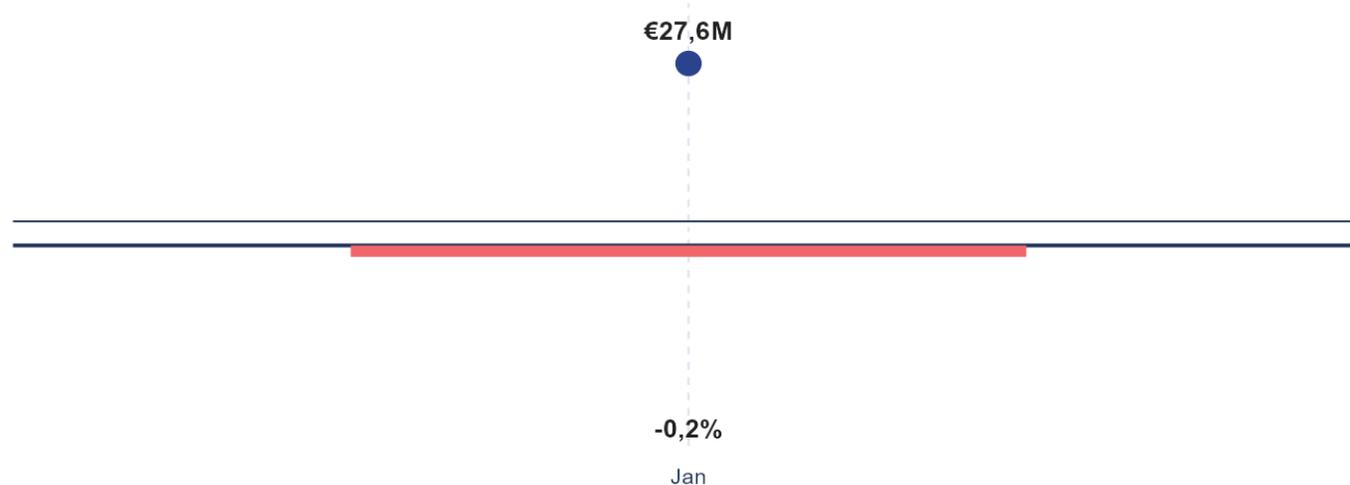
Sales Value incl. VAT

€28M

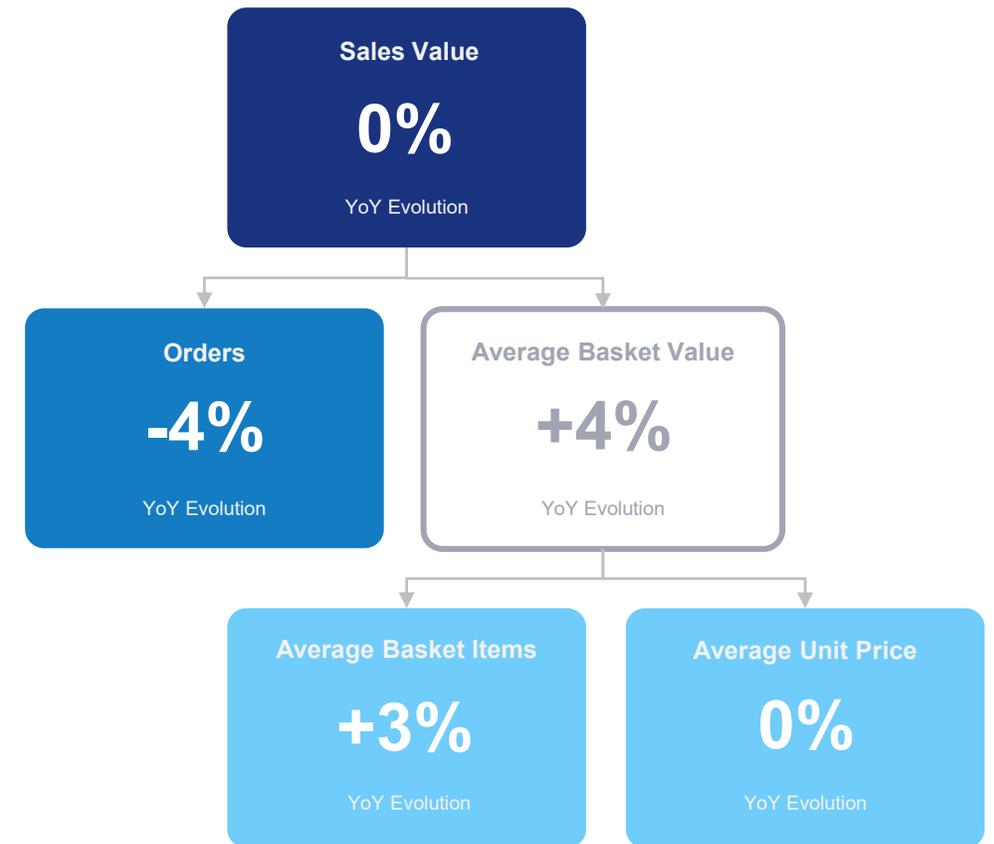
YoY Evolution

0%

Monthly Sales Value & YoY Evolution



Sales Value Decomposition & Growth Drivers



Mega Categories Overview

Fresh Food

Sales Value Weight

35% +1pp

YoY Evolution in Sales Value

+2%



J

Contribution to Growth

+1pp

Basic Packaged Food

Sales Value Weight

22% 0pp

YoY Evolution in Sales Value

0%



J

Contribution to Growth

0pp

Cleaning Products & Paper for Household Use

Sales Value Weight

12% -1pp

YoY Evolution in Sales Value

-6%



J

Contribution to Growth

-1pp

Bottled Beverages, Soft Drinks, Water & Drink Mixes

Sales Value Weight

9% 0pp

YoY Evolution in Sales Value

-2%



J

Contribution to Growth

0pp

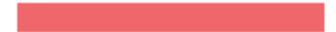
Beauty & Health

Sales Value Weight

5% 0pp

YoY Evolution in Sales Value

-4%



J

Contribution to Growth

0pp

Mega Categories Overview

Frozen foods

Sales Value Weight

5% 0pp

YoY Evolution in Sales Value

+2%



J

Contribution to Growth

0pp

Other

Sales Value Weight

4% +1pp

YoY Evolution in Sales Value

+19%



J

Contribution to Growth

+1pp

Bakery

Sales Value Weight

4% 0pp

YoY Evolution in Sales Value

-3%



J

Contribution to Growth

0pp

Baby & Kid

Sales Value Weight

3% 0pp

YoY Evolution in Sales Value

-13%



J

Contribution to Growth

0pp

Pet Supplies

Sales Value Weight

1% 0pp

YoY Evolution in Sales Value

+13%



J

Contribution to Growth

0pp

Thank you

