



# MARKET VIEW YTD February 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

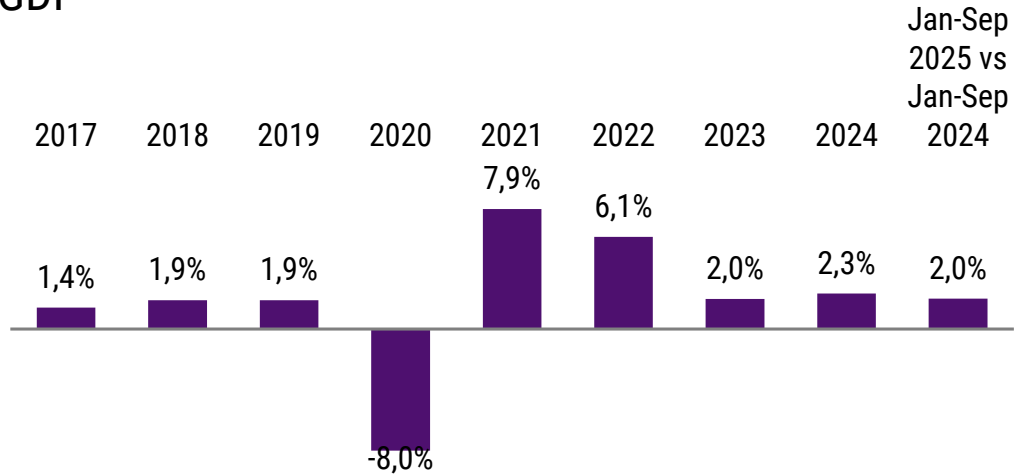
YTD February 2026 vs YTD February 2025

01

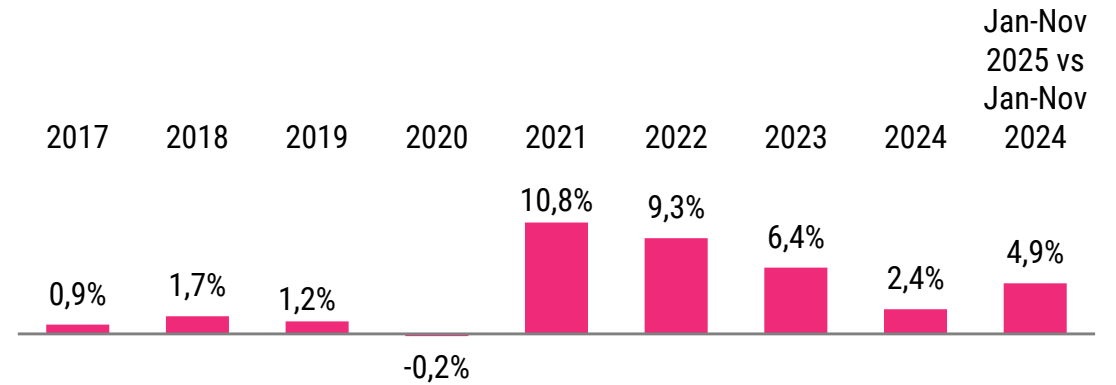
# Greek Economy

# Greek Economy

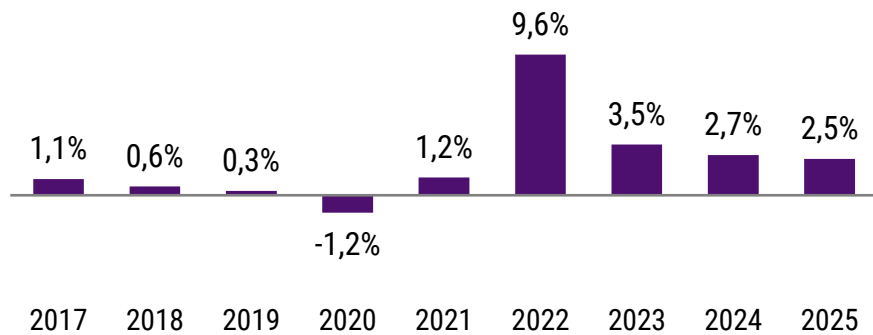
## GDP



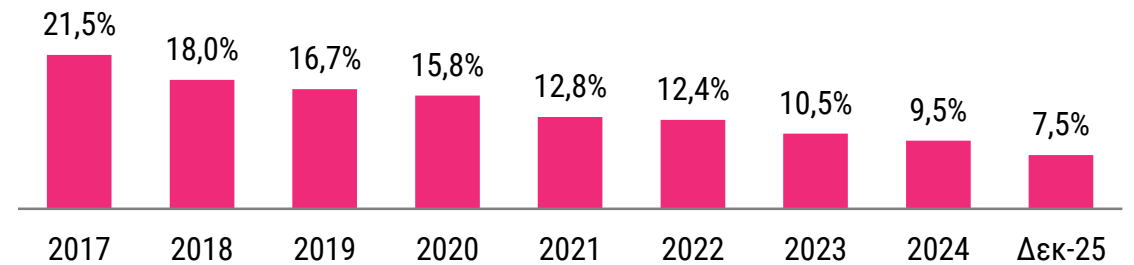
## RETAIL TURNOVER INDEX (w.o AUTOMOTIVE FUEL)



## INFLATION RATE TREND



## UNEMPLOYMENT





02

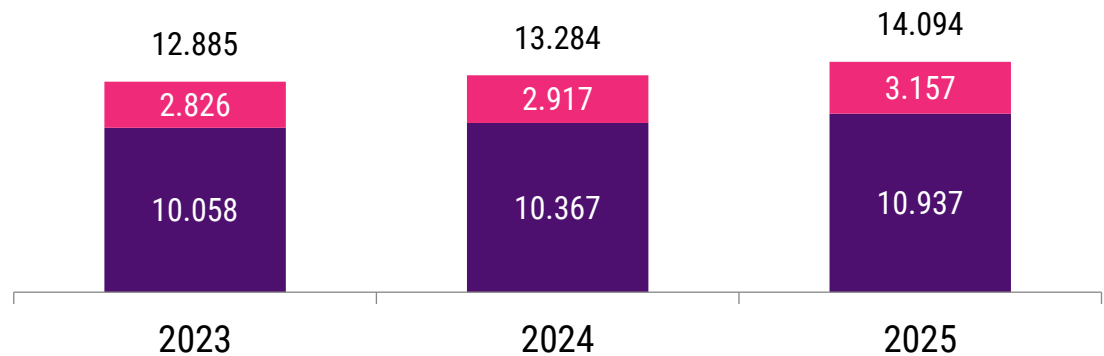
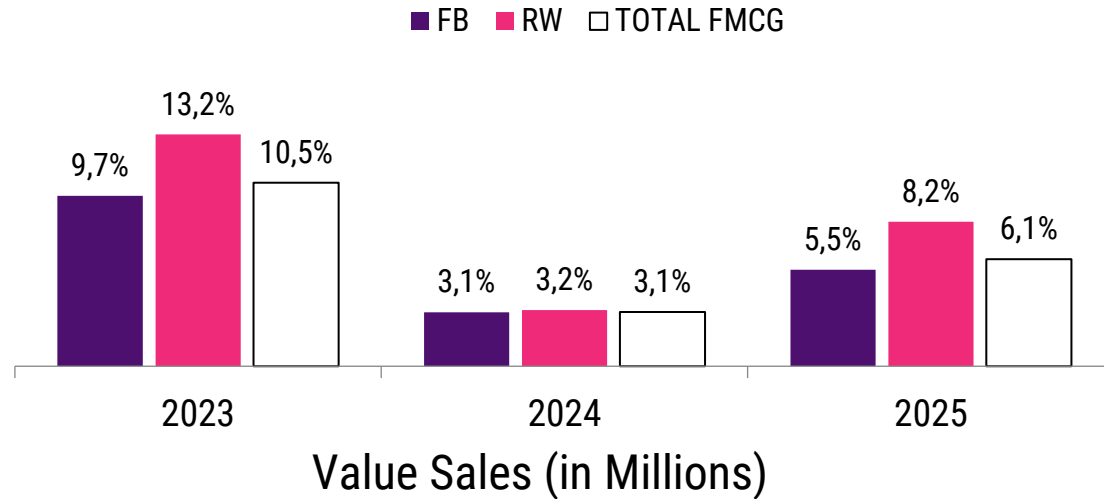
# Trends for FMCG Market

Fixed Barcodes + Random Weight

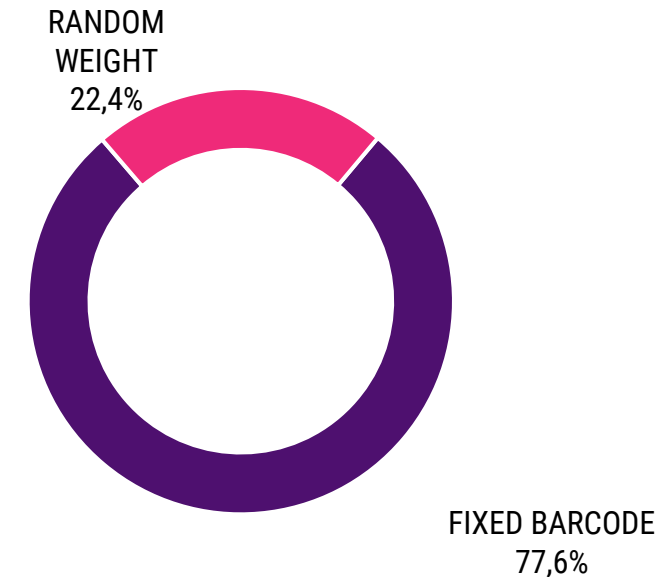
# FMCG Value Sales Trend – Year 2025



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



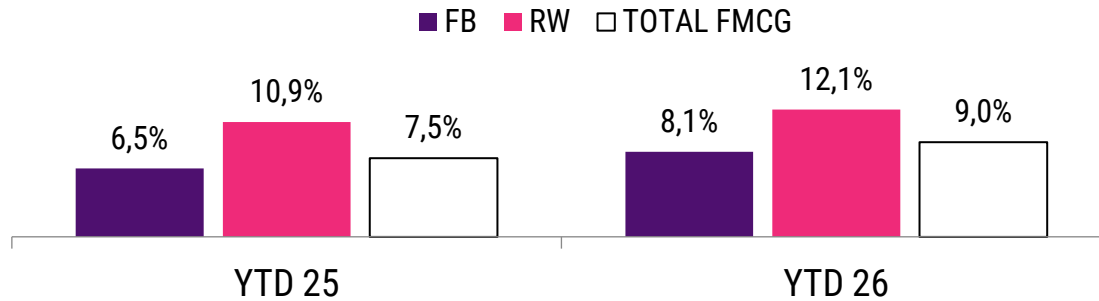
## 2025 Value Contribution



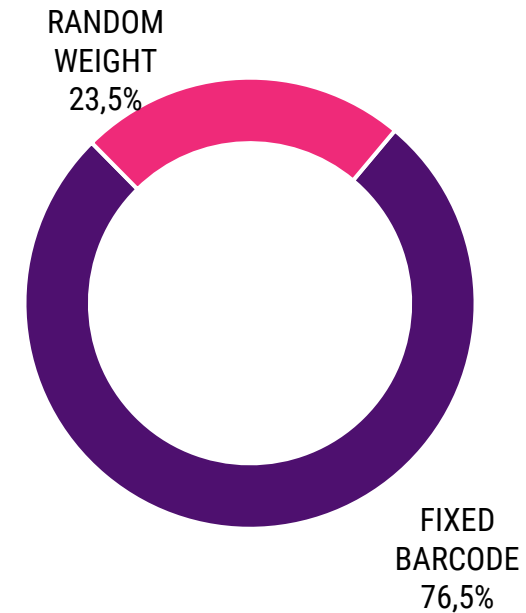
# FMCG Value Sales Trend – YTD



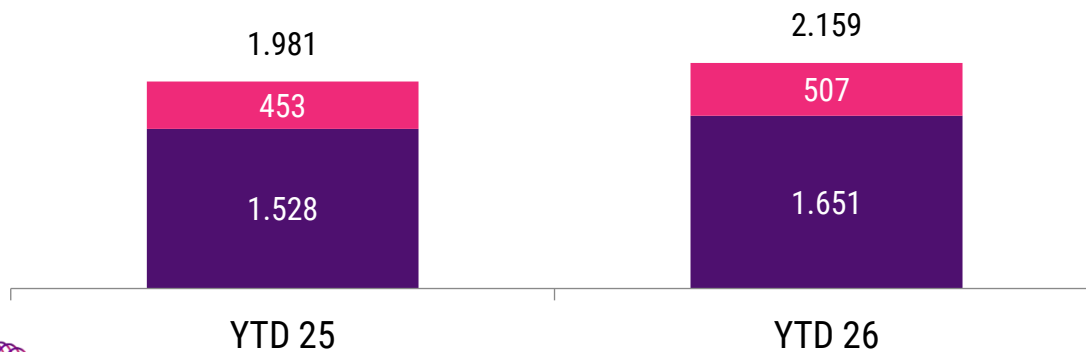
Increase for Total FMCG in YTD 26 (+9.0%) due to both Segments (more intense for RW)



## YTD 26 Value Contribution



## Value Sales (in Millions)



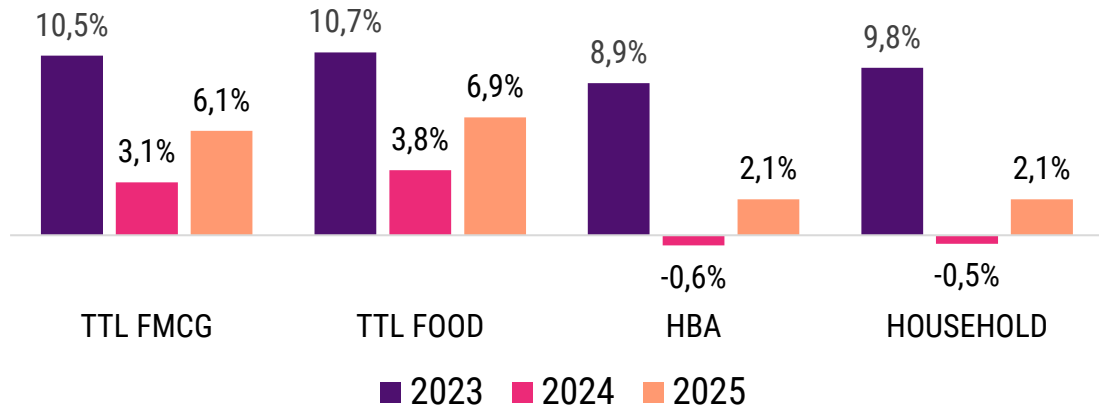
Source: Circana InfoScan, HM/SM + Random Weight, YTD February 26

Circana, Inc. and Circana Group, L.P. | Proprietary and confidential

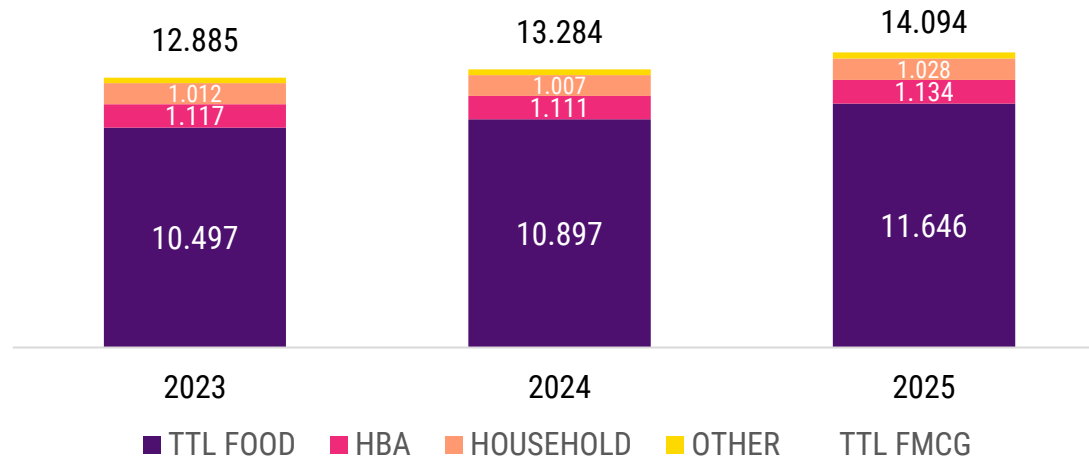
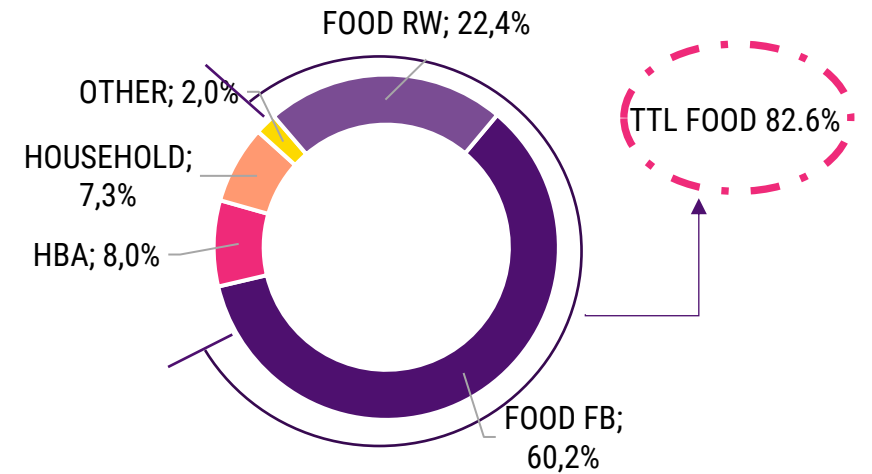
# FMCG Value Sales Trend – Year 2025



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



2025 Value Contribution

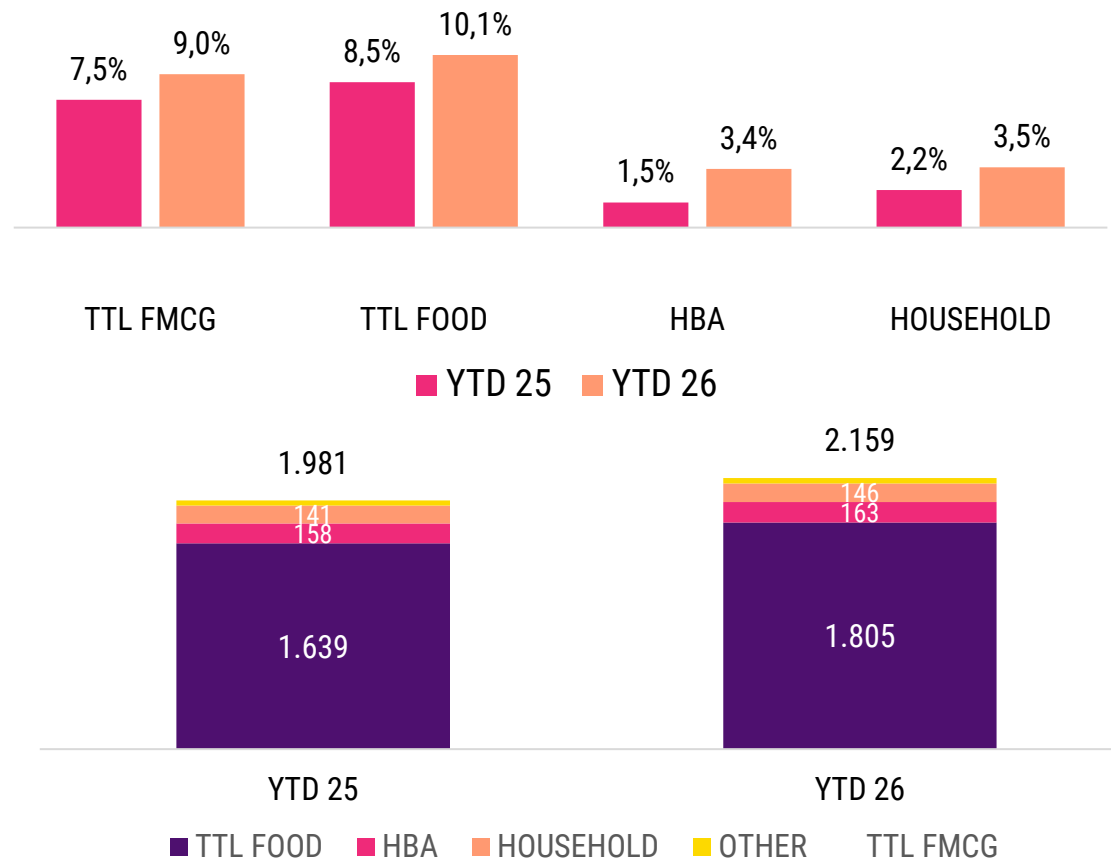


Source: Circana InfoScan, HM/SM + Random Weight, Year 2025

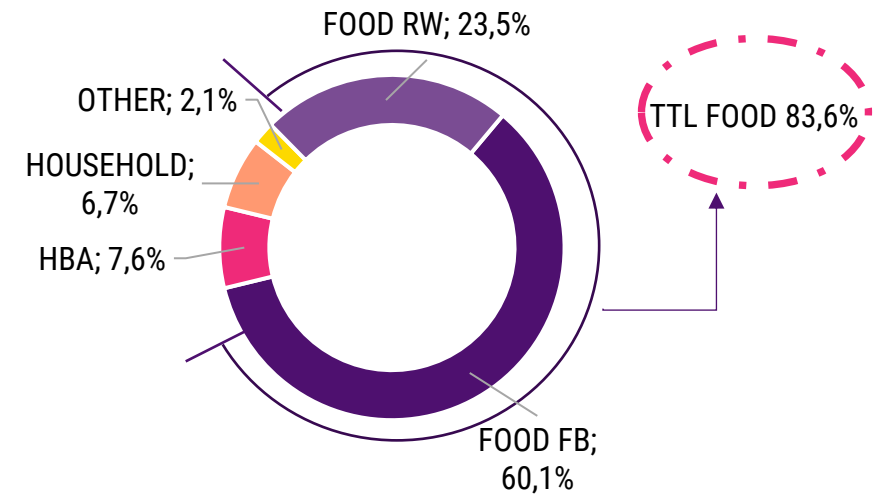
# FMCG Value Sales Trend – YTD



Food manages the highest increase in YTD 26



YTD 26 Value Contribution



Source: Circana InfoScan, HM/SM + Random Weight, YTD February 26

Circana, Inc. and Circana Group, L.P. | Proprietary and confidential



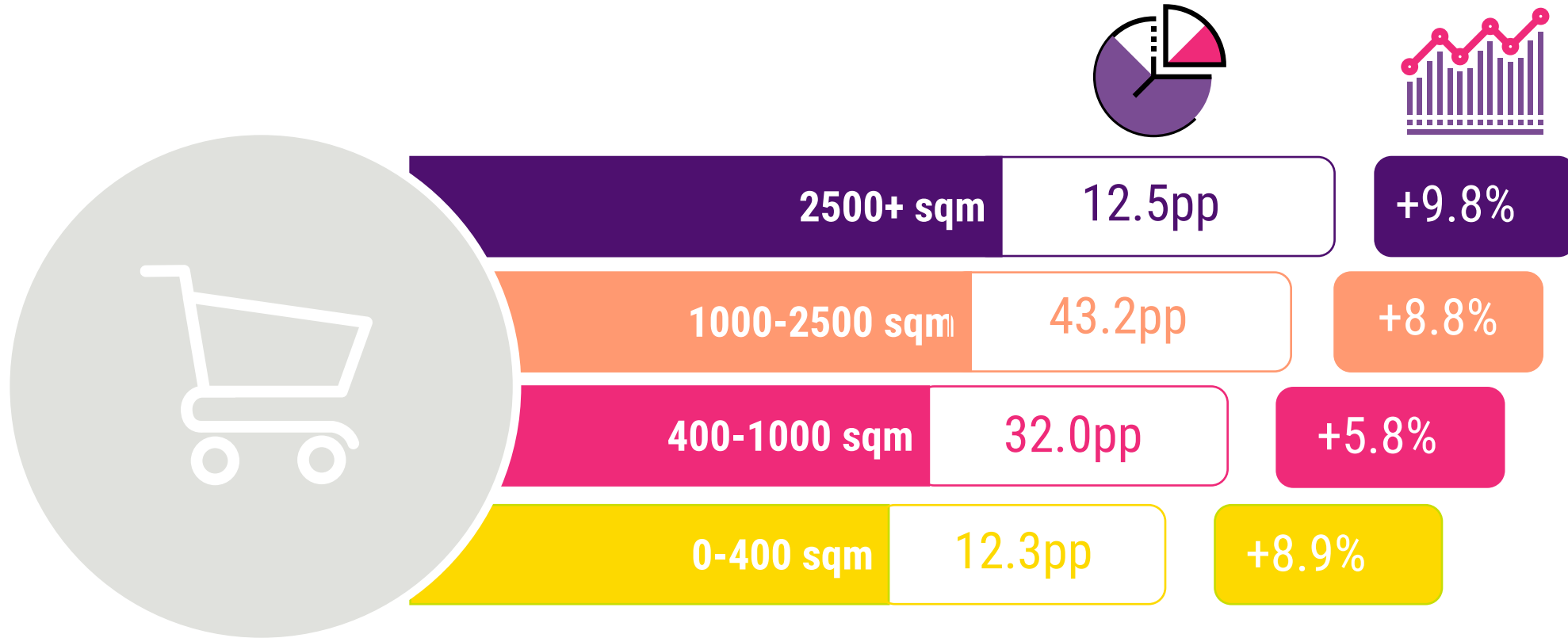
03

# Trends for FMCG Market

Fixed Barcodes

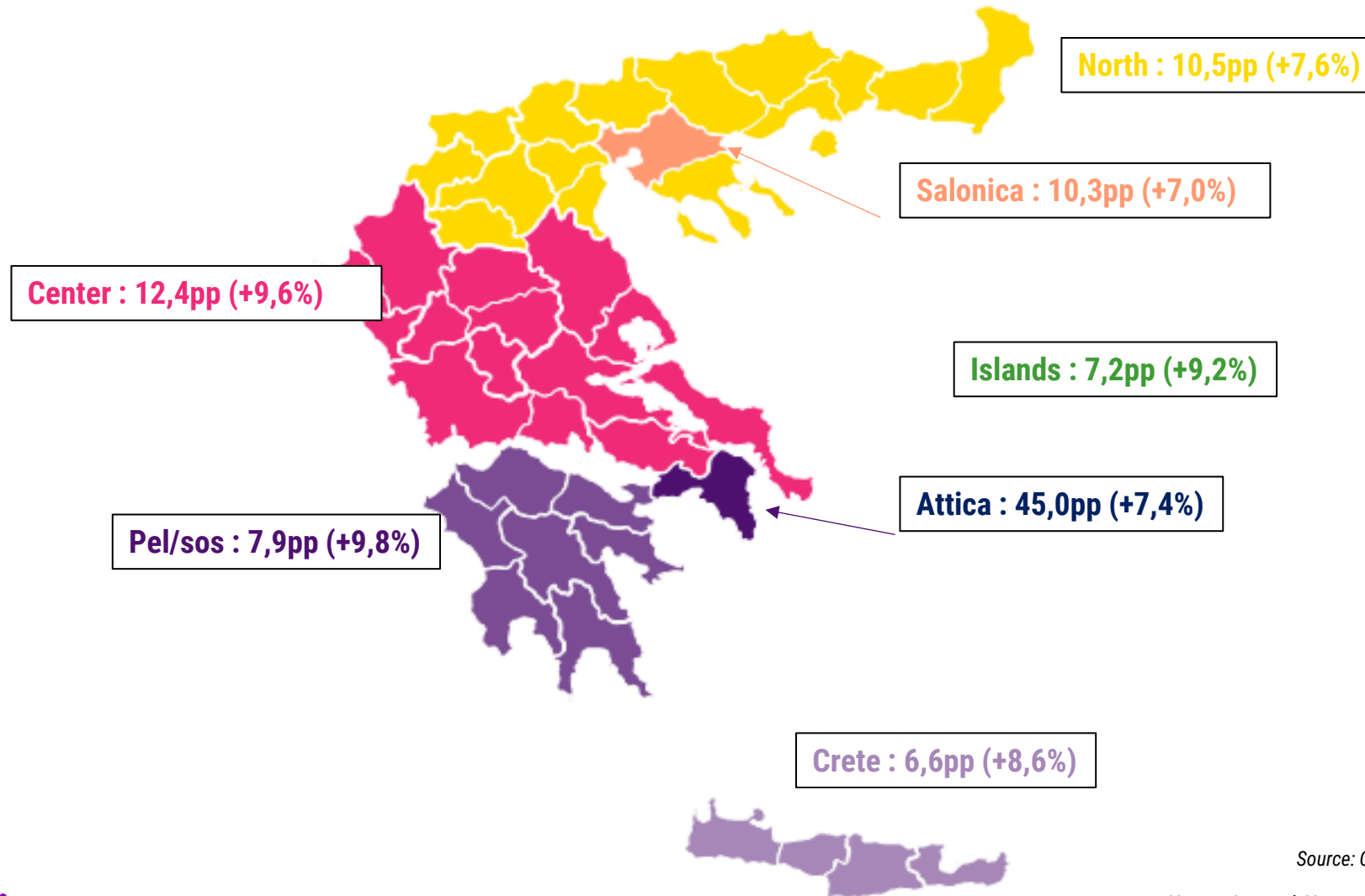
# FMCG Value Sales Trends per Store Type YTD

All Shop Types achieve growth during YTD 26, less intense for Medium SMs



 **Excl. Islands**

# FMCG Value Sales Trends per Geo YTD

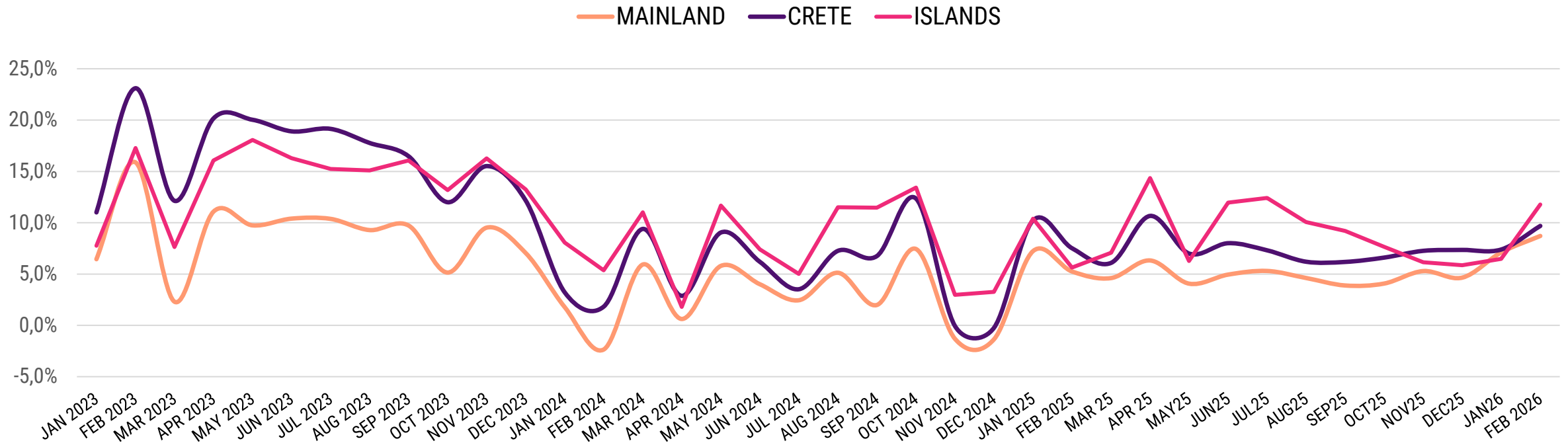




# Geos Special Analysis

# FMCG Monthly Value Growth

More intense growth for Islands during February 26



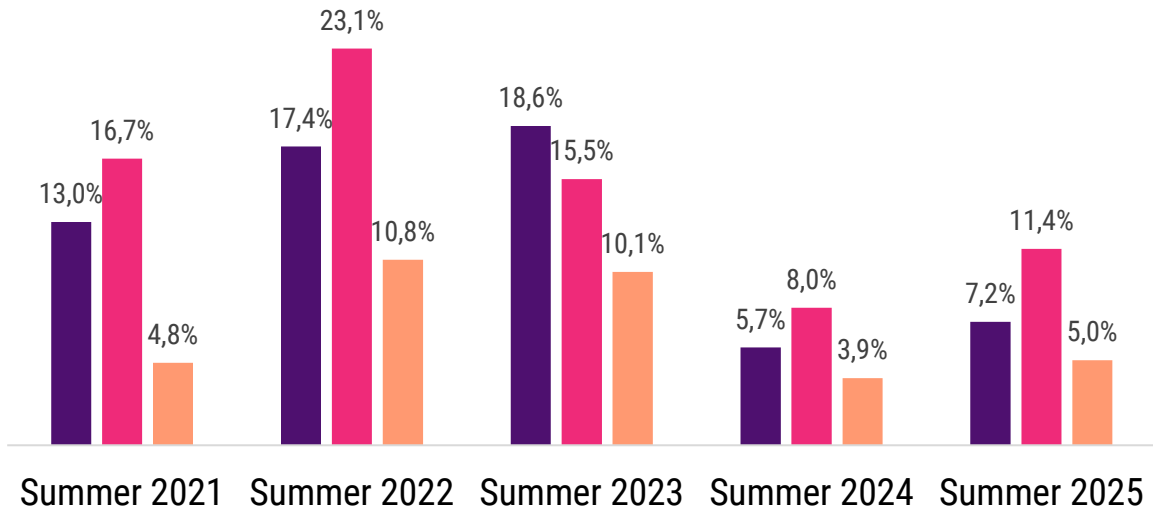
# FMCG Value Growth during Summers



Intense growth during Summers for Islands and Crete

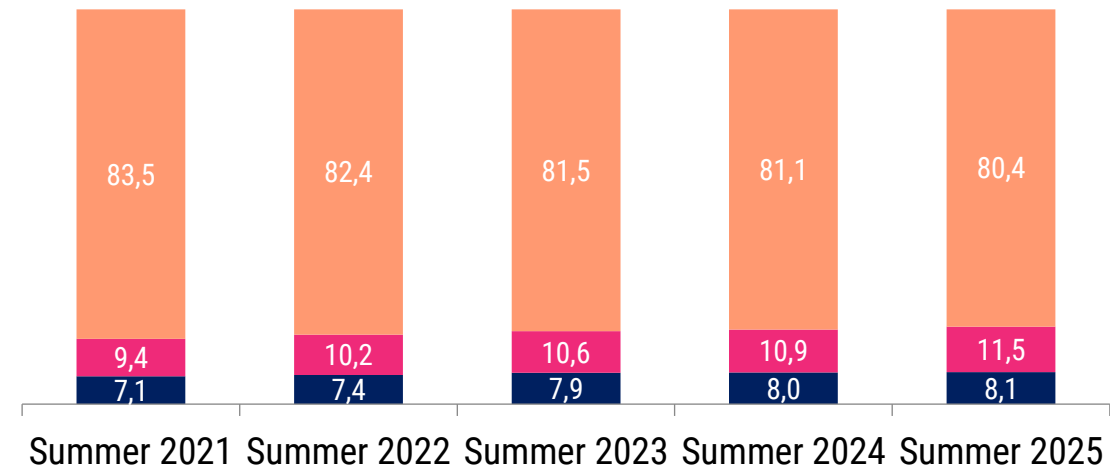
### Value Growth

■ CRETE ■ ISLANDS ■ MAINLAND



### Value Contribution

■ CRETE ■ ISLANDS ■ MAINLAND



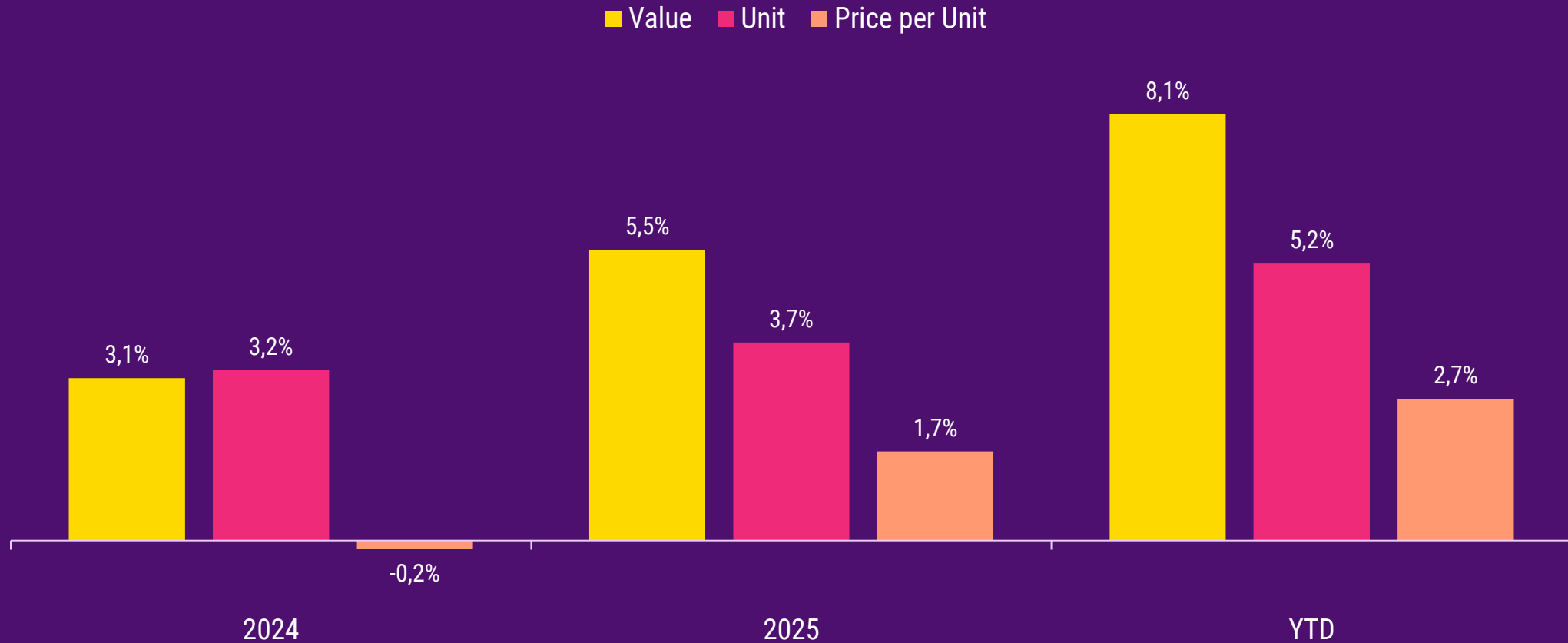
The background features a complex, abstract pattern of wavy, overlapping lines in shades of purple and orange. These lines are set against a dark, almost black background, creating a sense of depth and movement. Small, bright particles or dots are scattered throughout the pattern, adding to the intricate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

# Price Analysis

# FMCG Price Trends



More intense increase in Value during YTD 26

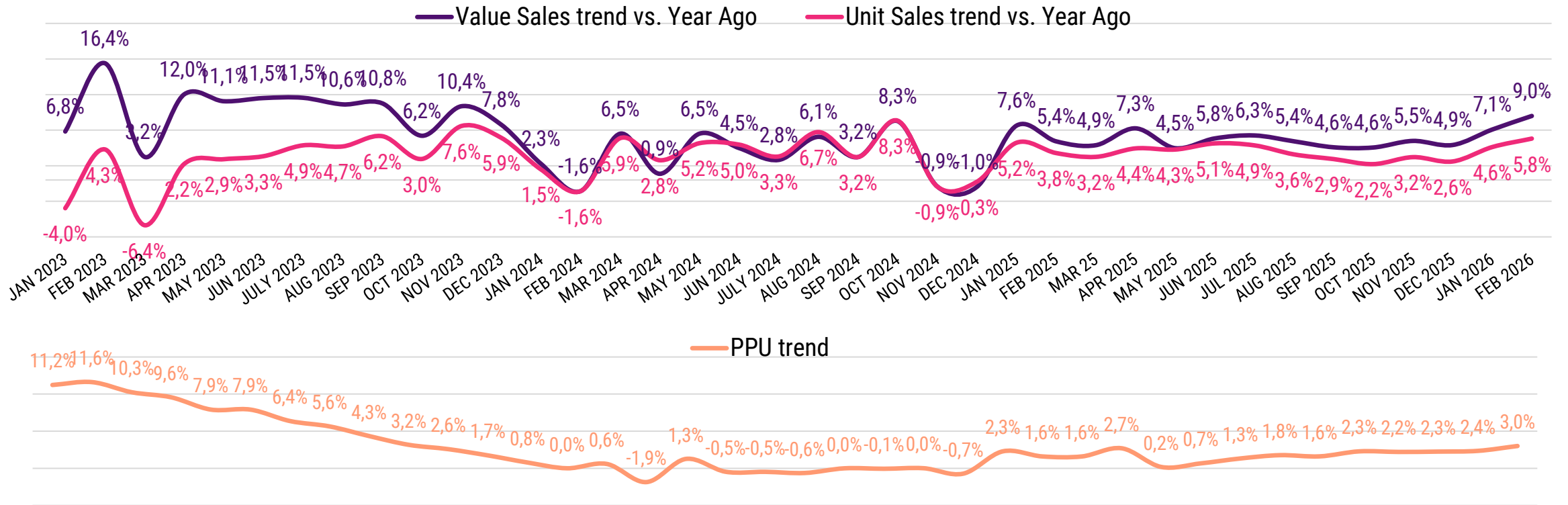


# FMCG Value and Unit Monthly Trends



Price per Unit increase in February 26

**YR 2024: +3.1%**  
**YR 2025: +5.5%**  
**YTD 2026: +8.1%**



Source: Circana InfoScan, HM/SM, YTD January 26



04

# Giga Categories Evolution

# Giga Categories Value Sales Trend

 **Incl. Islands**

Food manages the highest increase in YTD 26

YTD 2026



+9.3%



+3.4%



+3.5%

**Food**

**Health & Beauty**

**Household**

2025



+6.4%



+2.1%



+2.1%

# Giga Categories Unit Sales Trend

 **Incl. Islands**

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

YTD 2026



+5.4%



+3.1%



+4.0%

**Food**

**Health & Beauty**

**Household**

2025



+3.8%



+3.3%



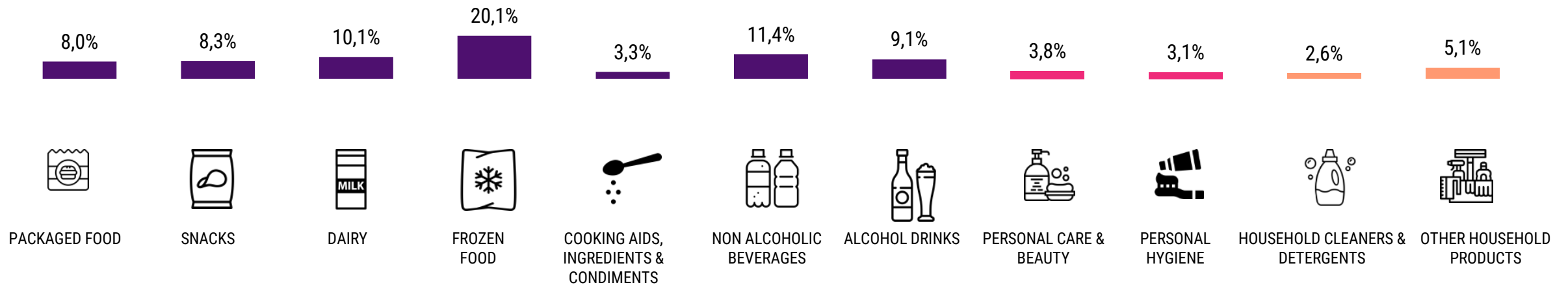
+2.6%

# Categories Value Sales Trend YTD

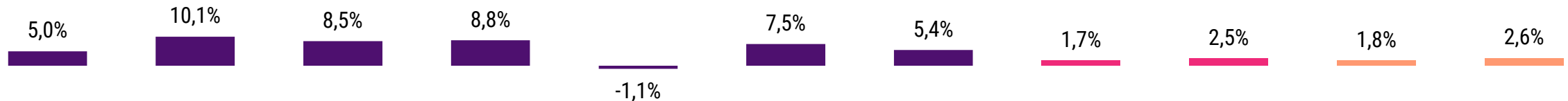


Intense growth for all Food Categories (especially Frozen, Non Alcohol & Alcohol and Dairy) in YTD 26

Value Sales Trend YTD 2026



Value Sales Trend 2025



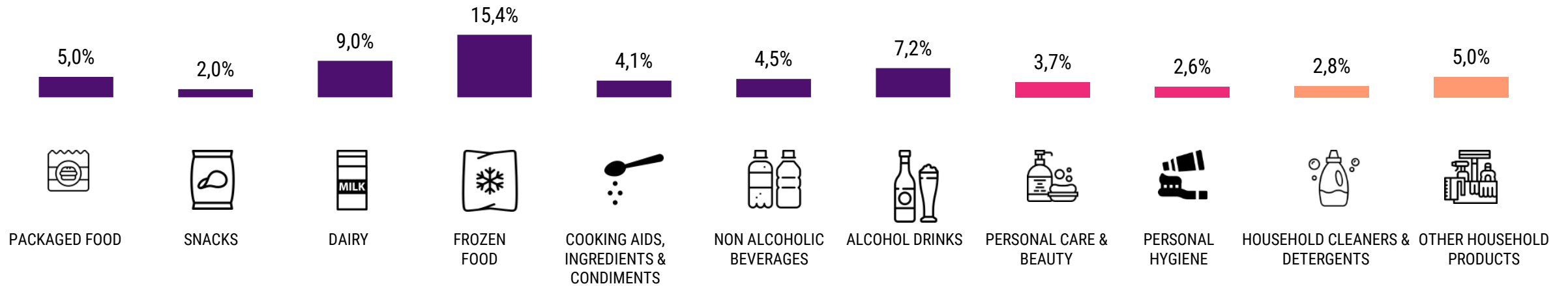
Source: Circana InfoScan, HM/SM, YTD February 26

# FMCG Unit Sales Trend YTD

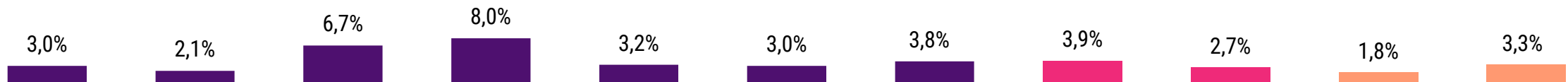


Cooking Aids achieve higher growth rate of Unit Sales compared to its Values

## Unit Sales Trend YTD 2026



## Unit Sales Trend 2025



Source: Circana InfoScan, HM/SM, YTD February 26



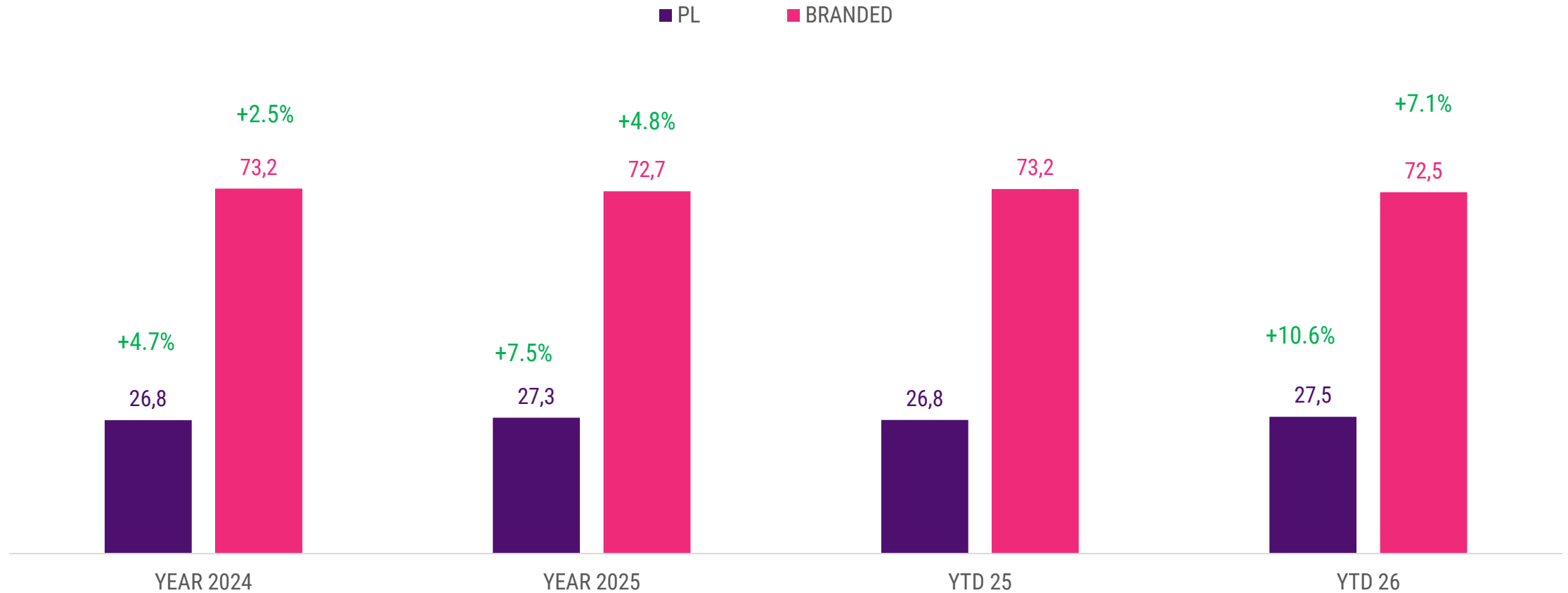
05

# Evolution of Private Labels

# PL and Branded Value Shares and Trends



PL continue with higher growth rate than Branded in YTD 26



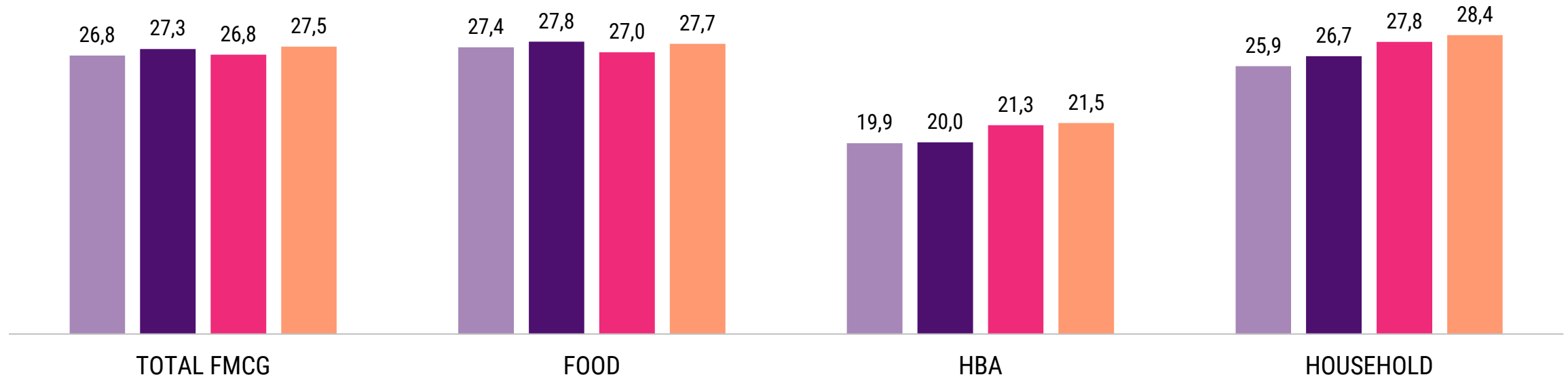
Source: Circana InfoScan, HM/SM, YTD February 26

# PL Value Share per Giga Category



Value Share increase for all 3 giga categories in YTD 26

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





06

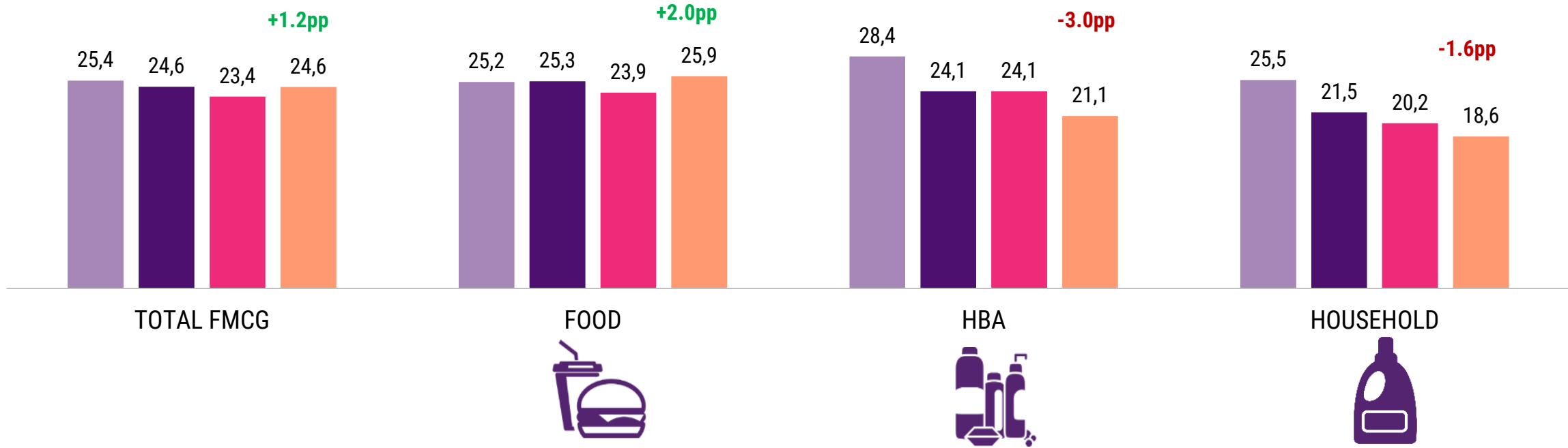
# Price Trends & Promo Pressure

# %Value Sales due to Temporary Price Reduction

Decreased promo intensity for Non Food in YTD 26



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

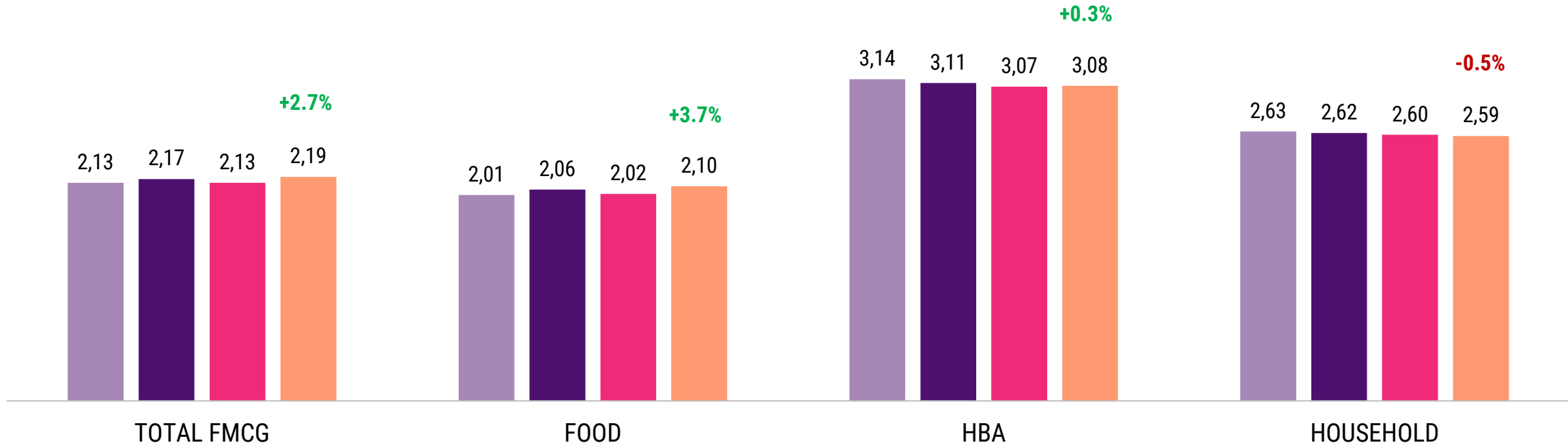


# Price per Unit per Giga Category



Price increase for Food influences total FMCG in YTD 26

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



Source: Circana InfoScan, HM/SM, YTD February 26

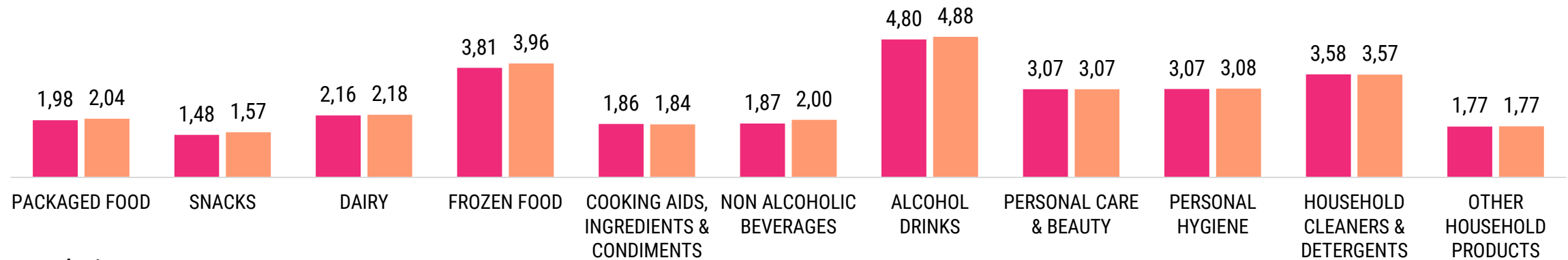
# Price per Unit per Category



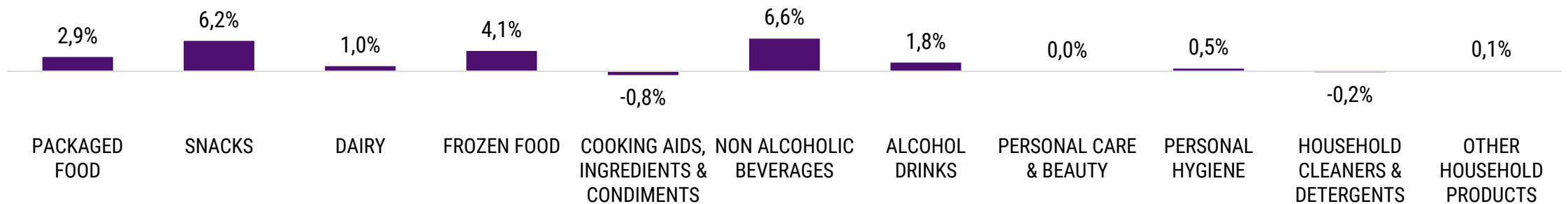
Intense price increase for Snacking, Non Alcohol and Frozen during YTD 26

Price per Unit

■ YTD 2025 ■ YTD 2026



Price evolution



Source: Circana InfoScan, HM/SM, YTD February 26



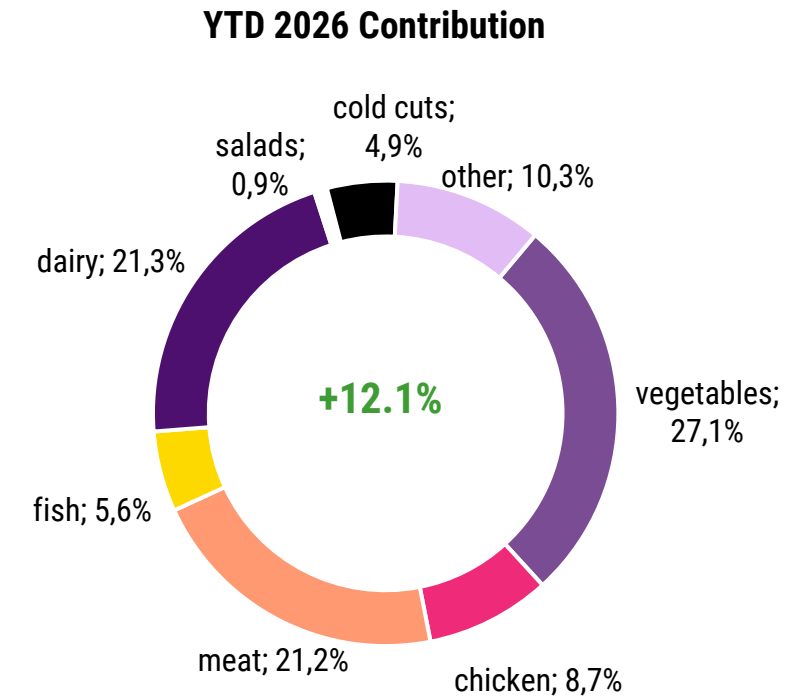
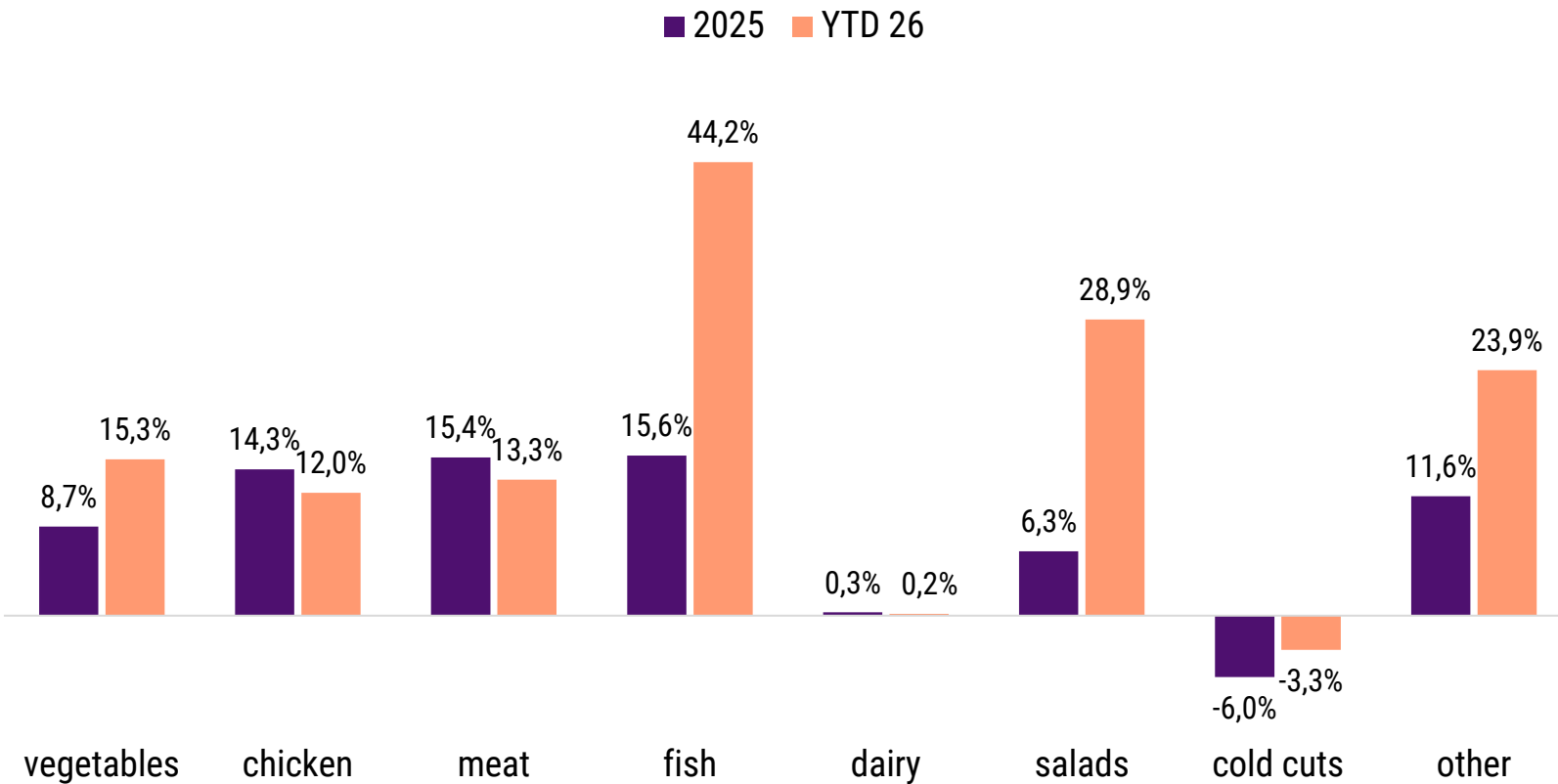
07

Random  
Weight  
Categories

# Random Weight Value Sales Trend



Intense Value Growth during YTD 26 for Random Weight Products



Source: Circana Random Weight, YTD February 26

08

# Online Grocery Trends Report

# eRetail Audit Panel Turnover

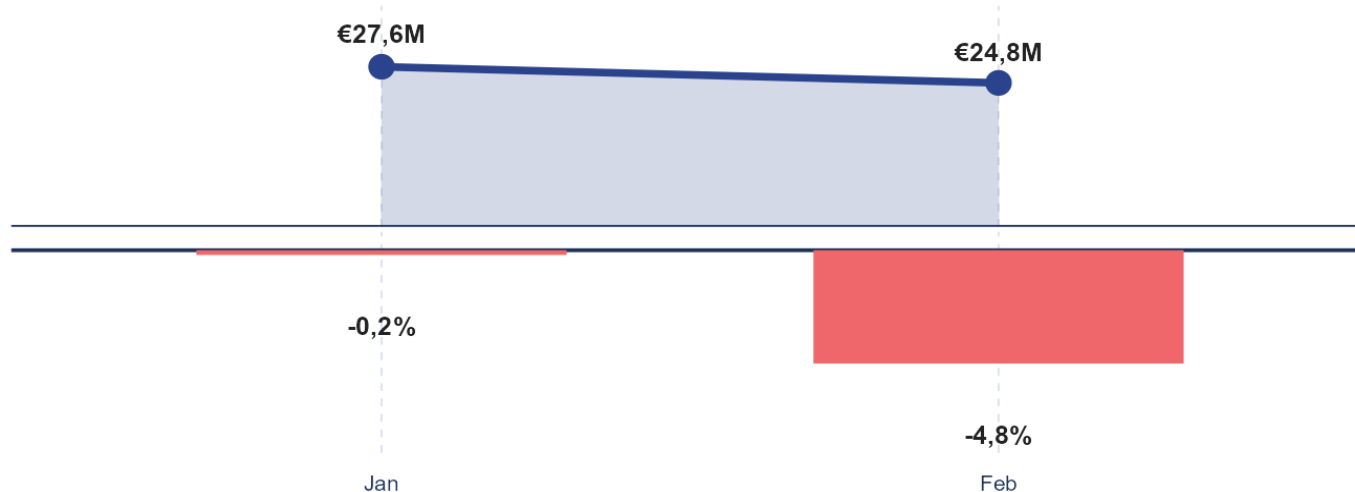
Sales Value incl. VAT

# €52M

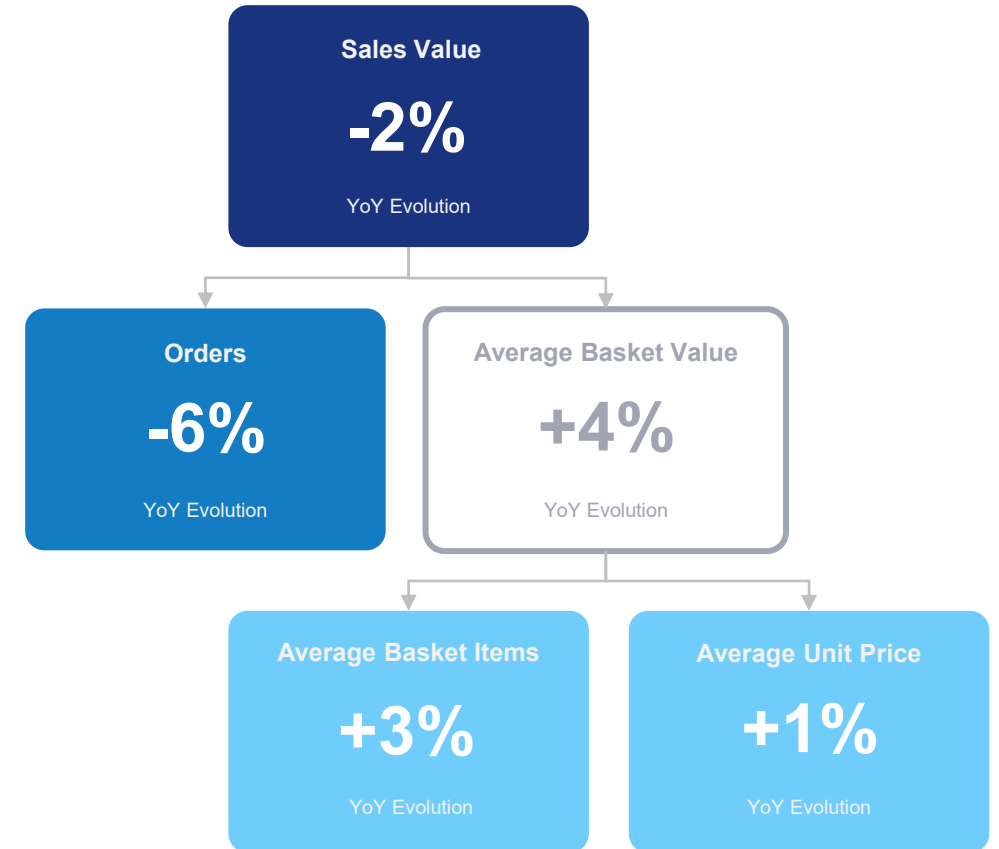
YoY Evolution

## -2%

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

**-1%**



J F

Contribution to Growth

**0pp**

## Basic Packaged Food

Sales Value Weight

**22%** 0pp

YoY Evolution in Sales Value

**-3%**



J F

Contribution to Growth

**-1pp**

## Cleaning Products & Paper for Household Use

Sales Value Weight

**11%** 0pp

YoY Evolution in Sales Value

**-6%**



J F

Contribution to Growth

**-1pp**

## Bottled Beverages, Soft Drinks, Water & Drink Mixes

Sales Value Weight

**10%** 0pp

YoY Evolution in Sales Value

**-4%**



J F

Contribution to Growth

**0pp**

## Frozen foods

Sales Value Weight

**6%** 0pp

YoY Evolution in Sales Value

**+1%**



J F

Contribution to Growth

**0pp**

# Mega Categories Overview

## Beauty & Health

Sales Value Weight

**5%** 0pp

YoY Evolution in Sales Value

**-5%**



Contribution to Growth

**0pp**

## Other

Sales Value Weight

**4%** +1pp

YoY Evolution in Sales Value

**+14%**



Contribution to Growth

**0pp**

## Bakery

Sales Value Weight

**4%** 0pp

YoY Evolution in Sales Value

**-6%**



Contribution to Growth

**0pp**

## Baby & Kid

Sales Value Weight

**3%** 0pp

YoY Evolution in Sales Value

**-13%**



Contribution to Growth

**0pp**

## Pet Supplies

Sales Value Weight

**1%** 0pp

YoY Evolution in Sales Value

**+8%**



Contribution to Growth

**0pp**

# Thank you

