



MARKET VIEW YTD April 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

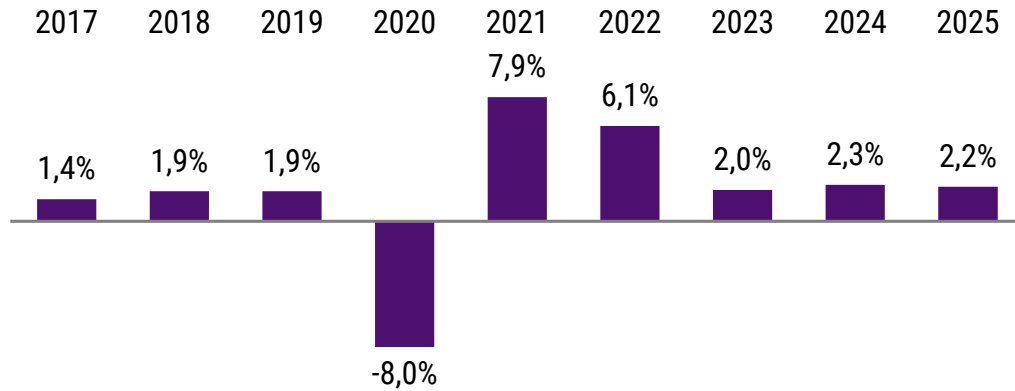
YR 2025 vs YR 2024
YTD April 2026 vs YTD April 2025

01

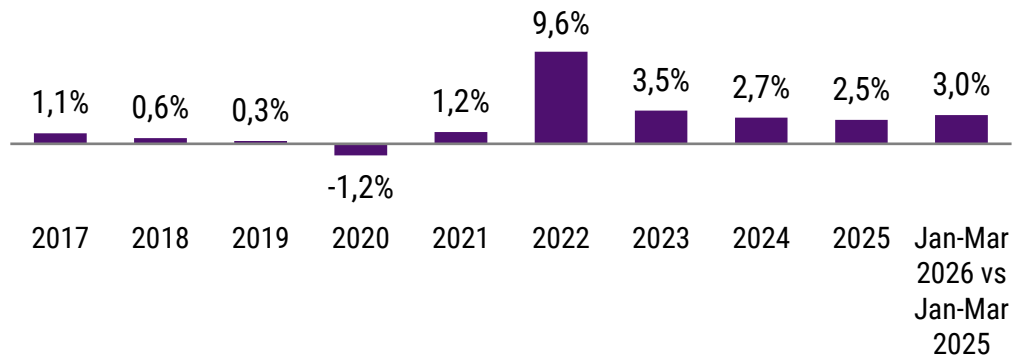
Greek Economy

Greek Economy

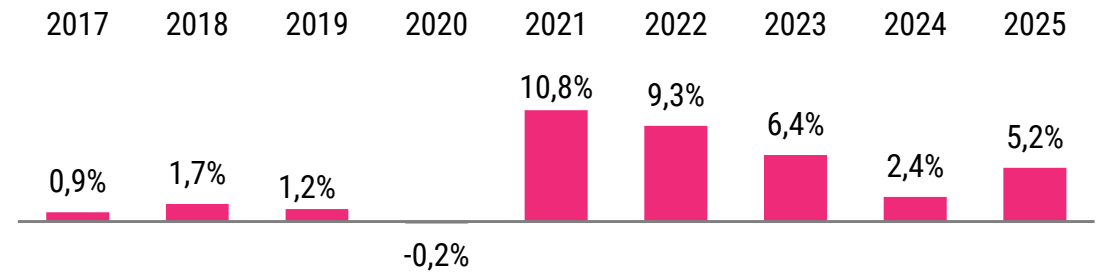
GDP



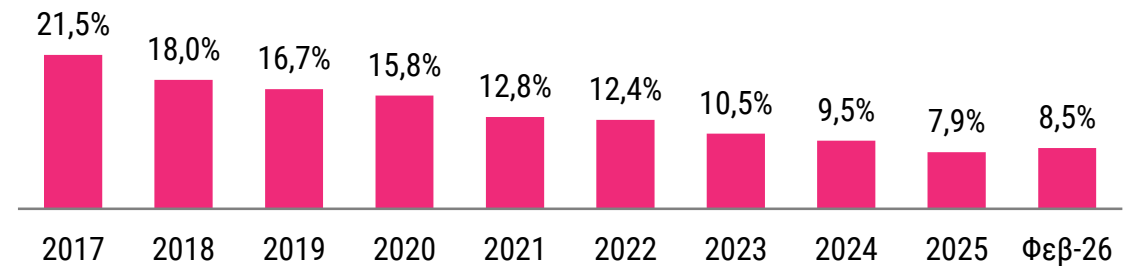
INFLATION RATE TREND



RETAIL TURNOVER INDEX (w.o AUTOMOTIVE FUEL)



UNEMPLOYMENT





02

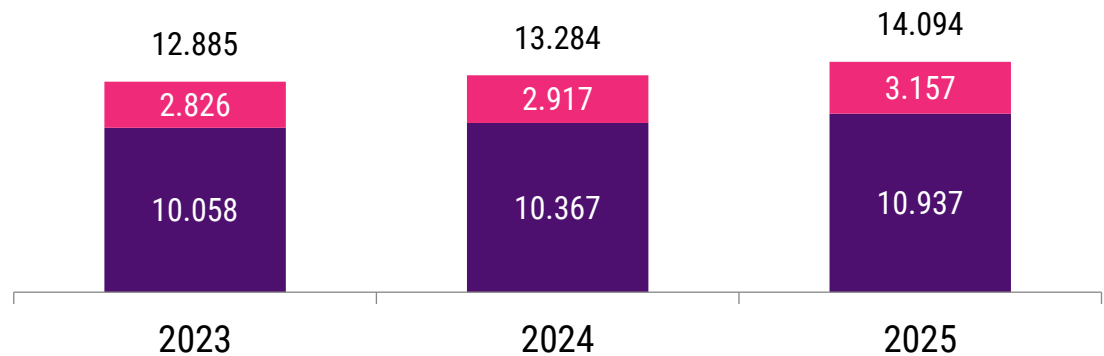
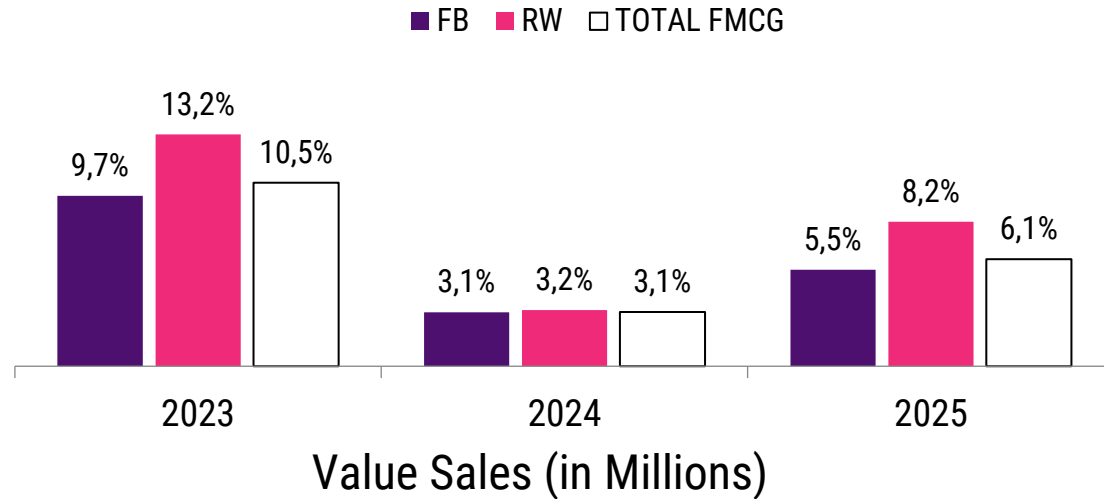
Trends for FMCG Market

Fixed Barcodes + Random Weight

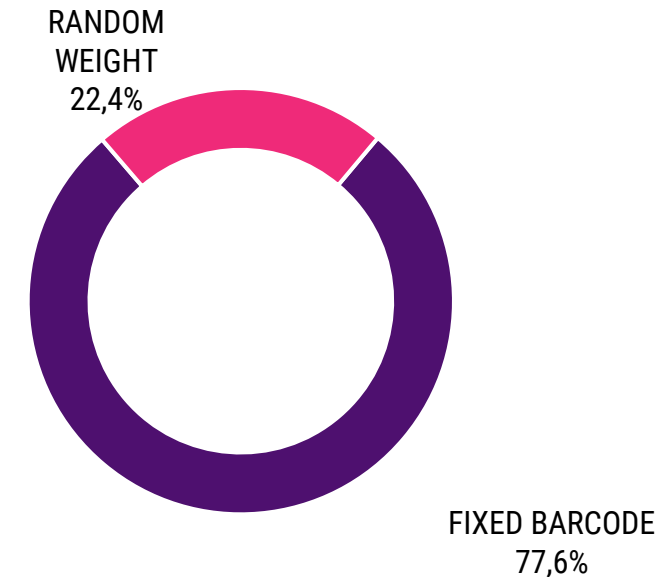
FMCG Value Sales Trend – Year 2025



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



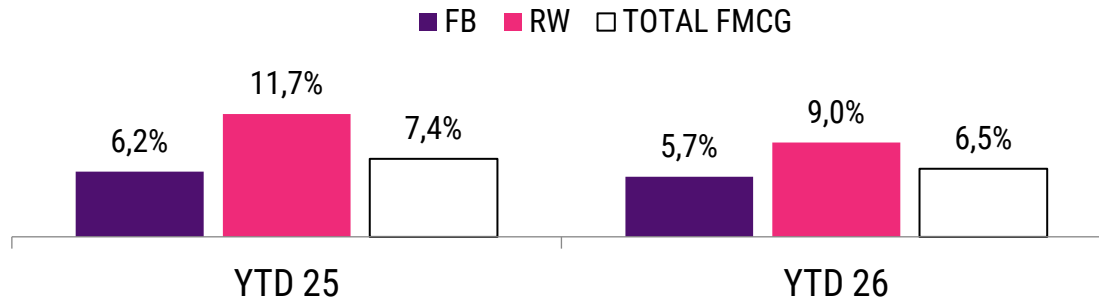
2025 Value Contribution



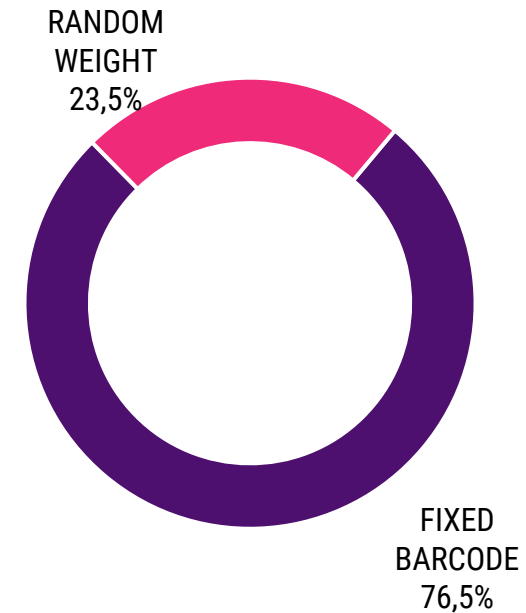
FMCG Value Sales Trend – YTD



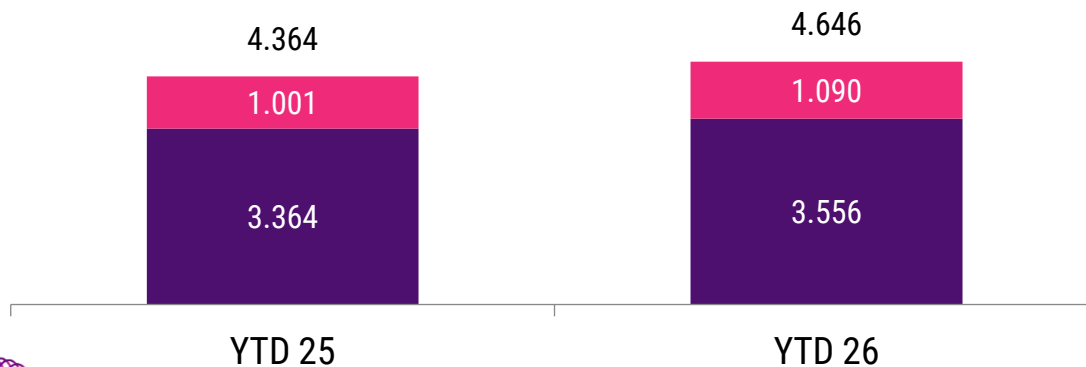
Increase for Total FMCG in YTD 26 (+6.5%) due to both Segments (more intense for RW)



YTD 26 Value Contribution



Value Sales (in Millions)

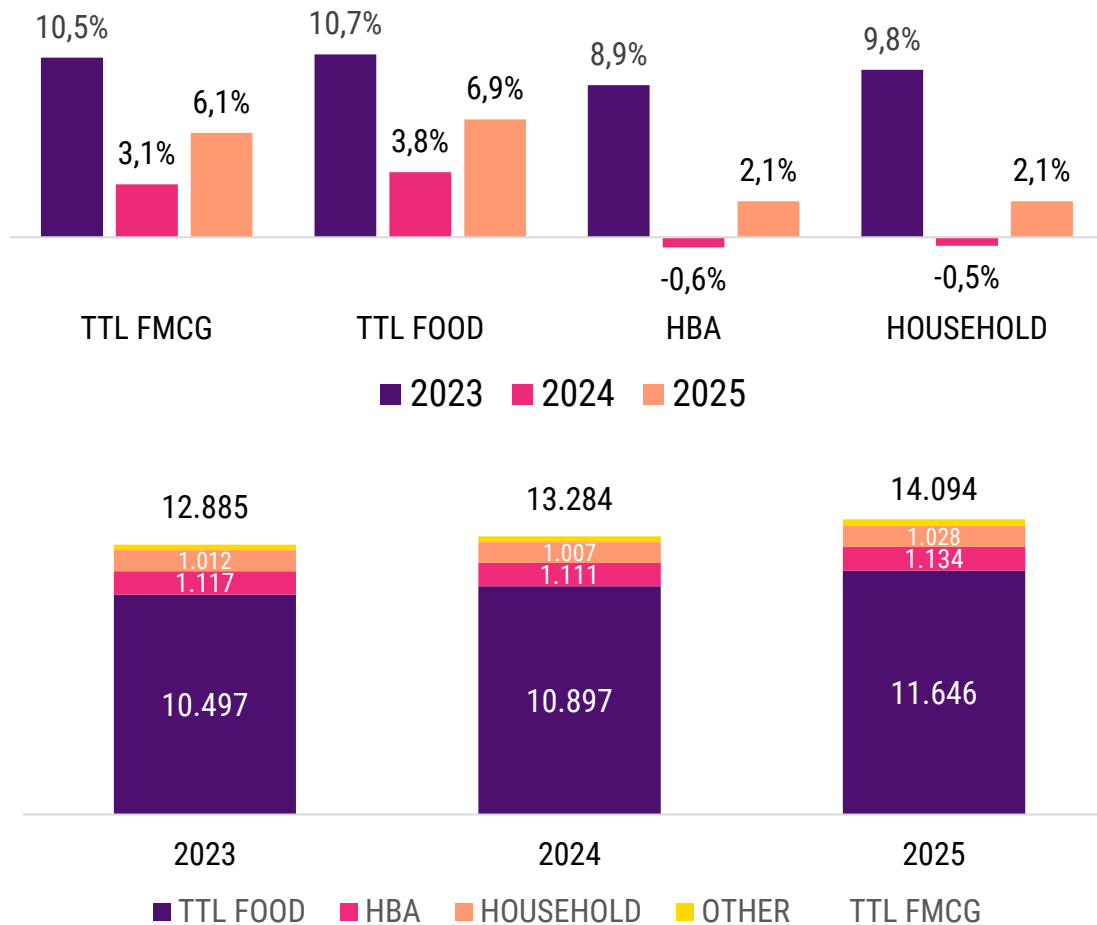


Source: Circana InfoScan, HM/SM + Random Weight, YTD April 26

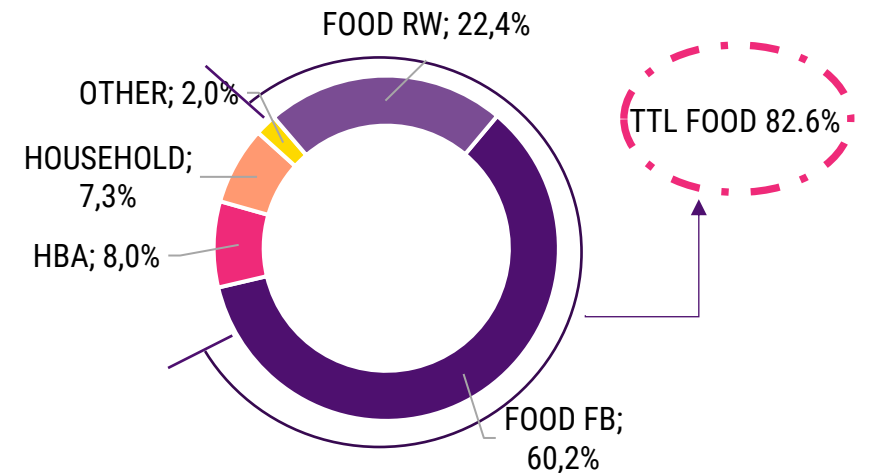
FMCG Value Sales Trend – Year 2025



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



2025 Value Contribution

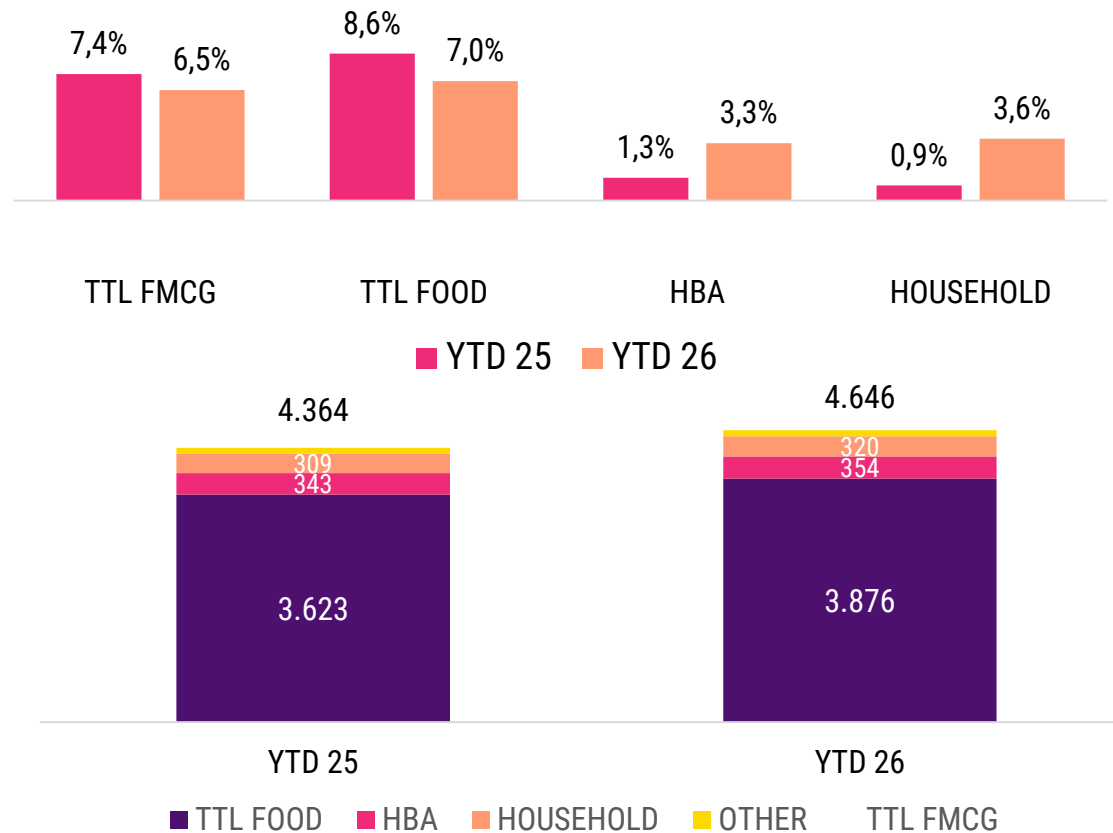


Source: Circana InfoScan, HM/SM + Random Weight, Year 2025

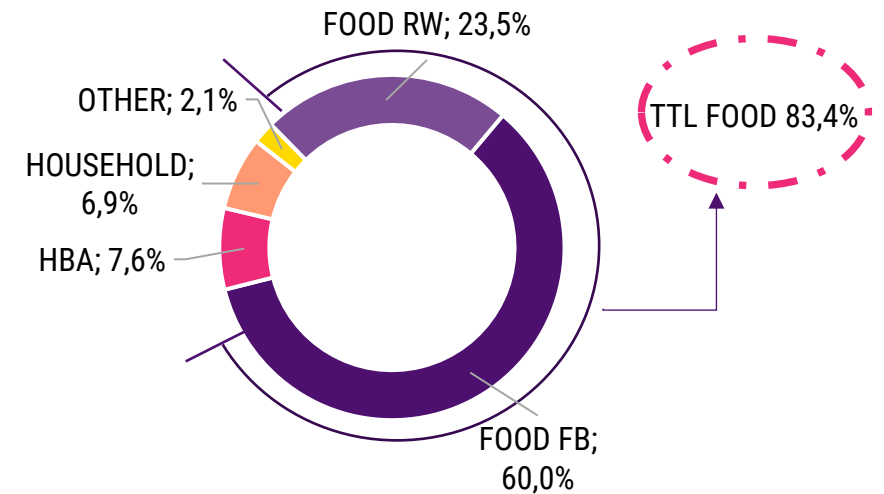
FMCG Value Sales Trend – YTD



Food manages the highest increase in YTD 26



YTD 26 Value Contribution



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



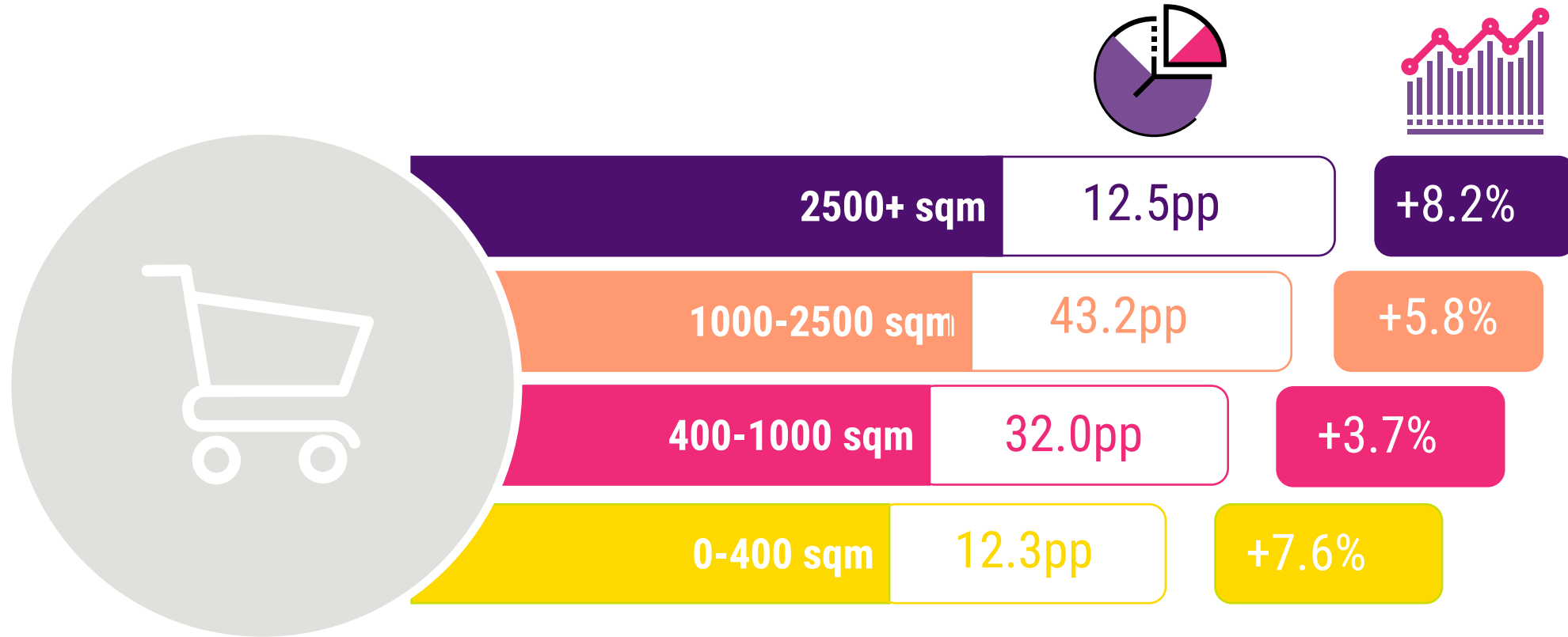
03

Trends for FMCG Market

Fixed Barcodes

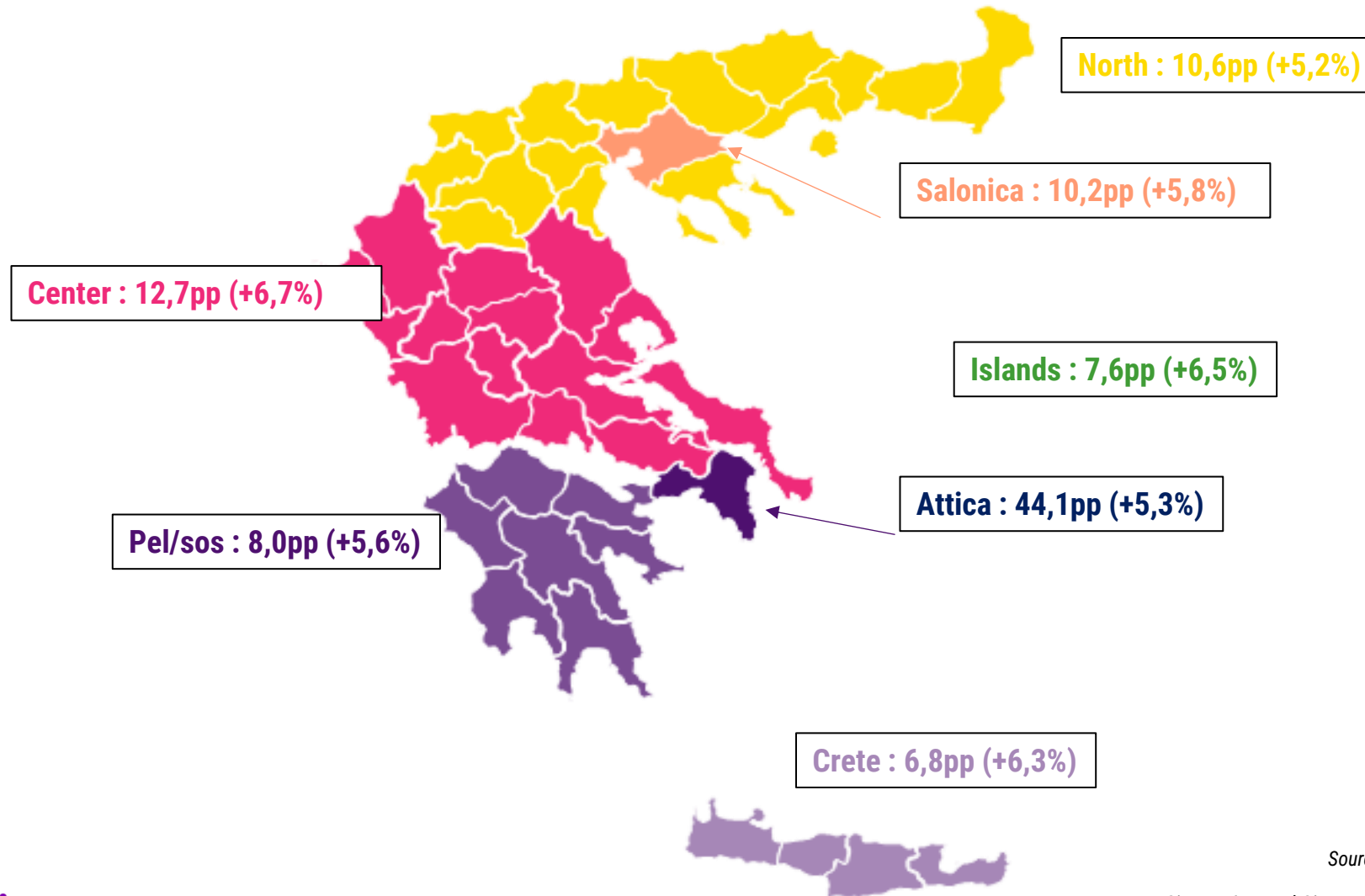
FMCG Value Sales Trends per Store Type YTD

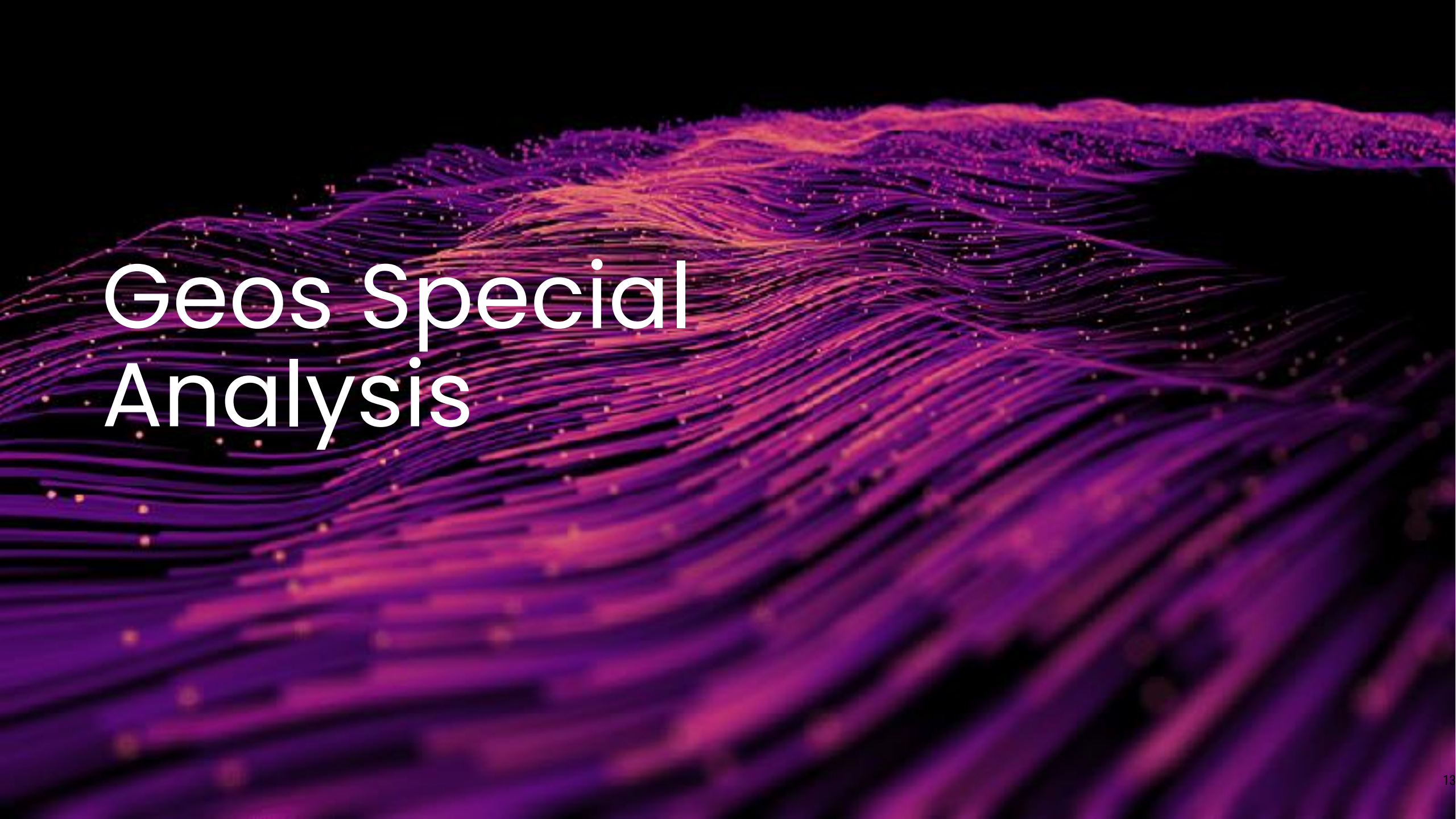
All Shop Types achieve growth during YTD 26, less intense for Medium SMs



 **Excl. Islands**

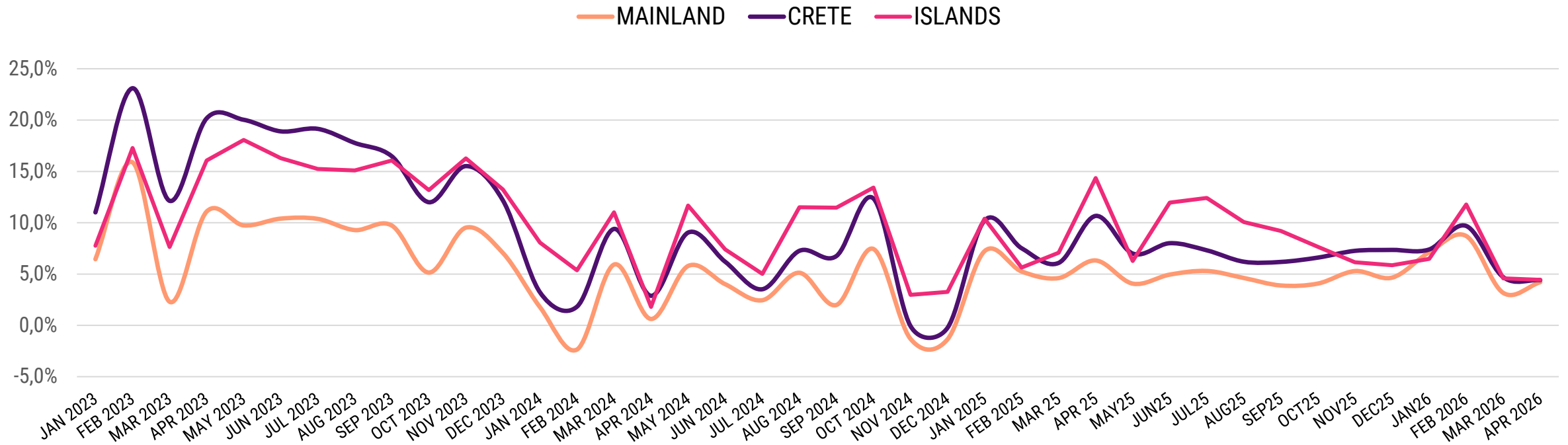
FMCG Value Sales Trends per Geo YTD





Geos Special Analysis

FMCG Monthly Value Growth



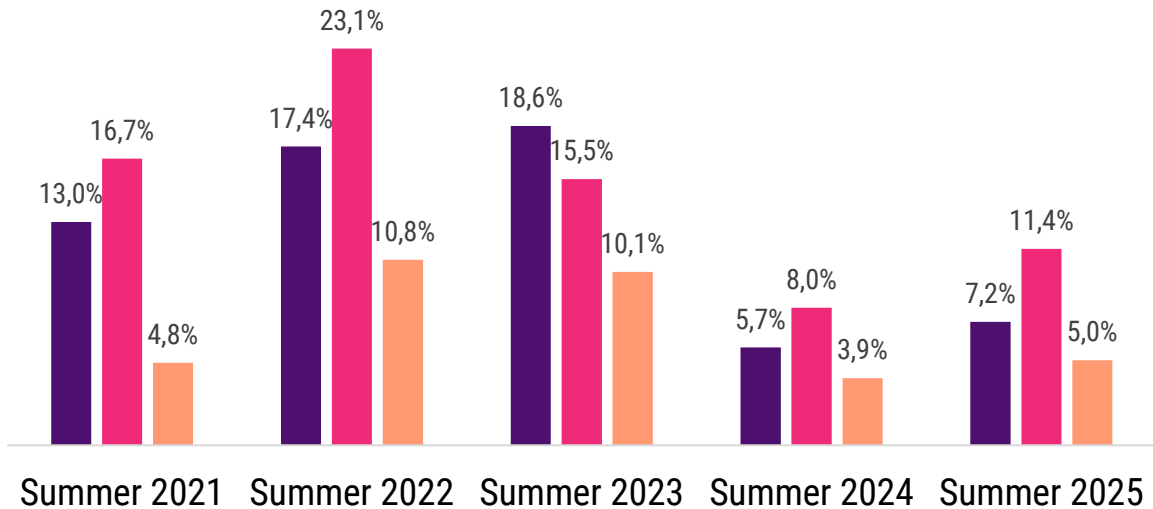
FMCG Value Growth during Summers



Intense growth during Summers for Islands and Crete

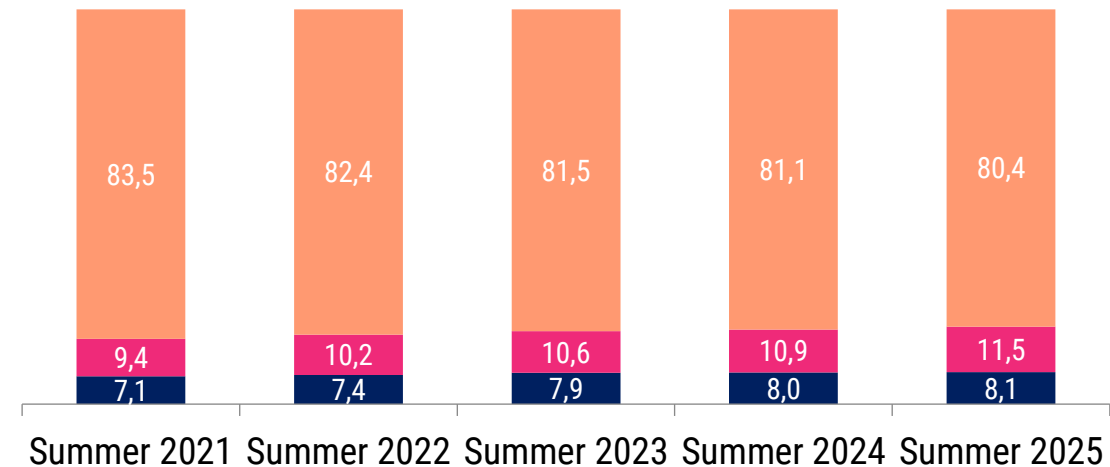
Value Growth

■ CRETE ■ ISLANDS ■ MAINLAND



Value Contribution

■ CRETE ■ ISLANDS ■ MAINLAND



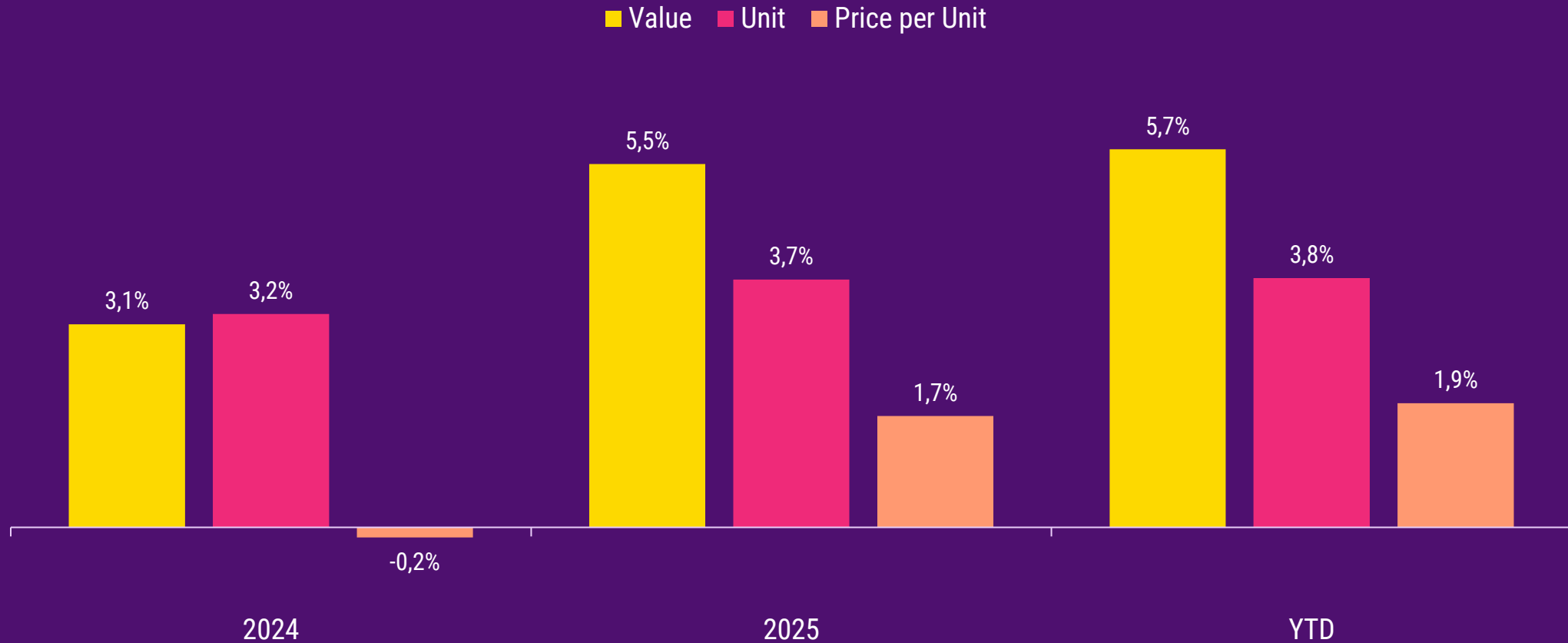
The background features a complex, abstract pattern of wavy, overlapping lines in shades of purple and orange. These lines are set against a dark, almost black background, creating a sense of depth and movement. Small, bright particles or dots are scattered throughout the pattern, adding to the intricate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

Price Analysis

FMCG Price Trends

 **Incl. Islands**

More intense increase in Value during YTD 26

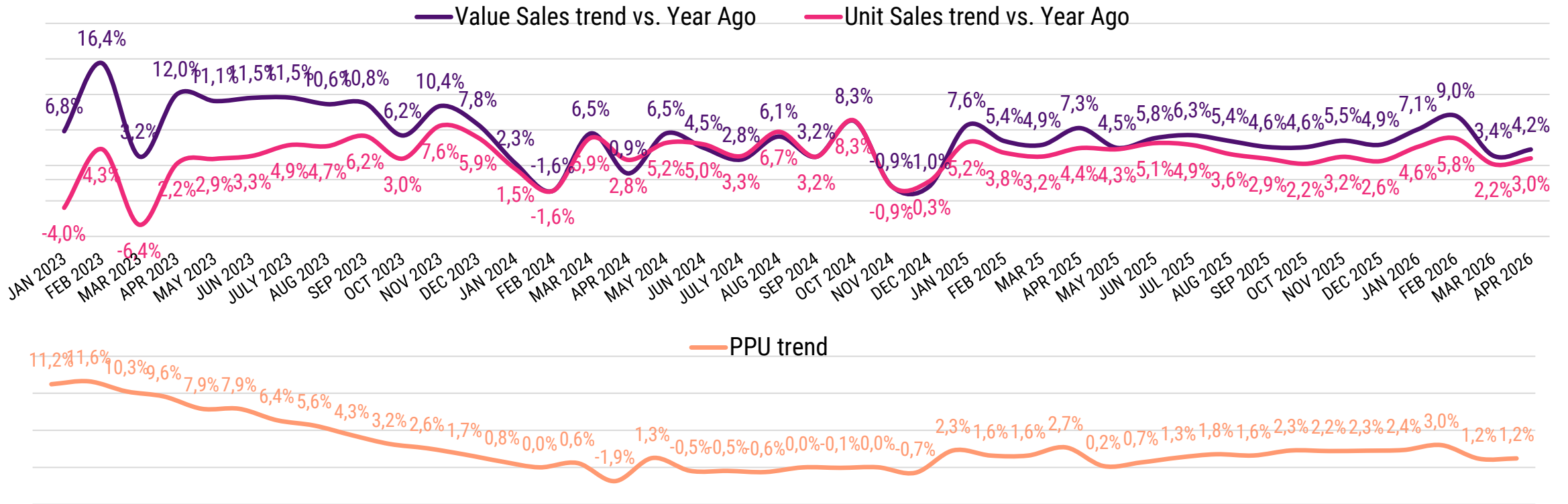


FMCG Value and Unit Monthly Trends



Lower gap between value and unit growth during the last two months

YR 2024: +3.1%
YR 2025: +5.5%
YTD 2026: +5.7%



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



04

Giga Categories Evolution

Giga Categories Value Sales Trend

 **Incl. Islands**

Food manages the highest increase in YTD 26

YTD 2026



+6.2%



+3.3%



+3.6%

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. Almost same unit growth for 3 Giga Categories

YTD 2026



+3.7%



+3.4%



+3.3%

Food

Health & Beauty

Household

2025



+3.8%



+3.3%



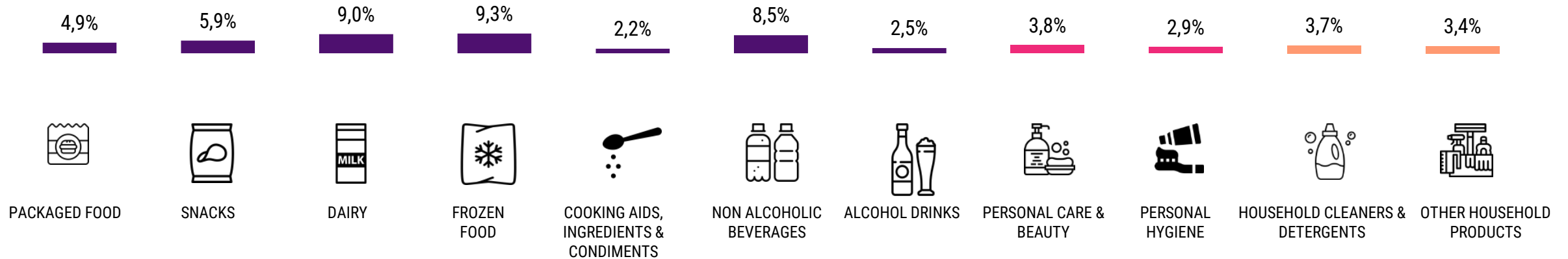
+2.6%

Categories Value Sales Trend YTD

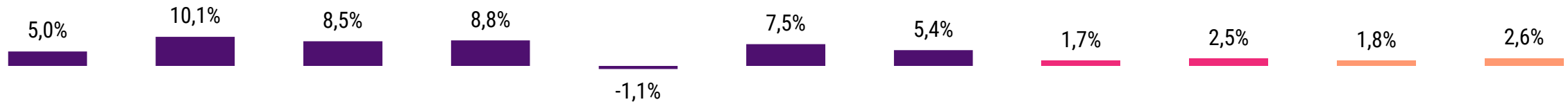


Intense growth for all Food Categories (especially for Frozen, Dairy & Non Alcohol) in YTD 26

Value Sales Trend YTD 2026



Value Sales Trend 2025



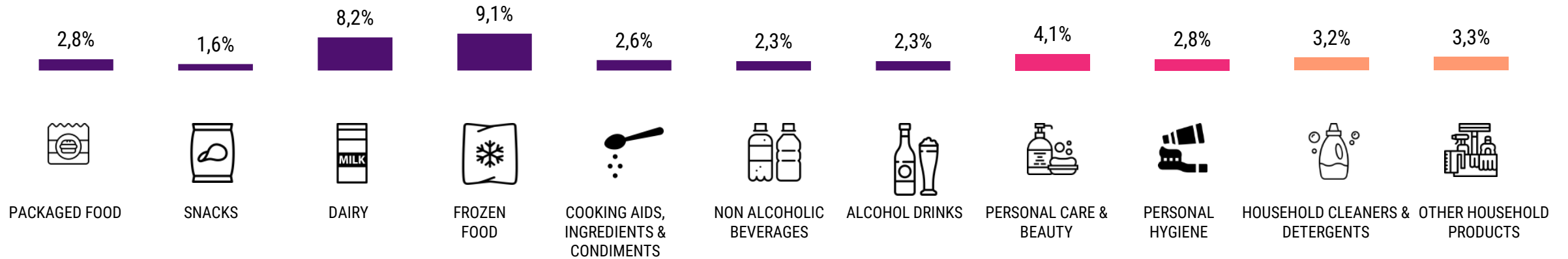
Source: Circana InfoScan, HM/SM, YTD April 26

FMCG Unit Sales Trend YTD

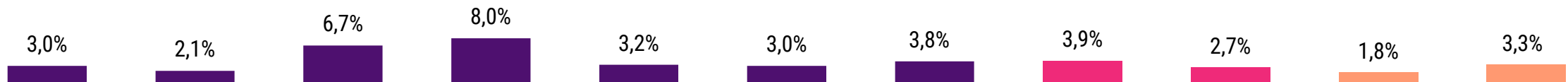


Significant growth for Frozen and Dairy, consistent with their values performance

Unit Sales Trend YTD 2026



Unit Sales Trend 2025



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



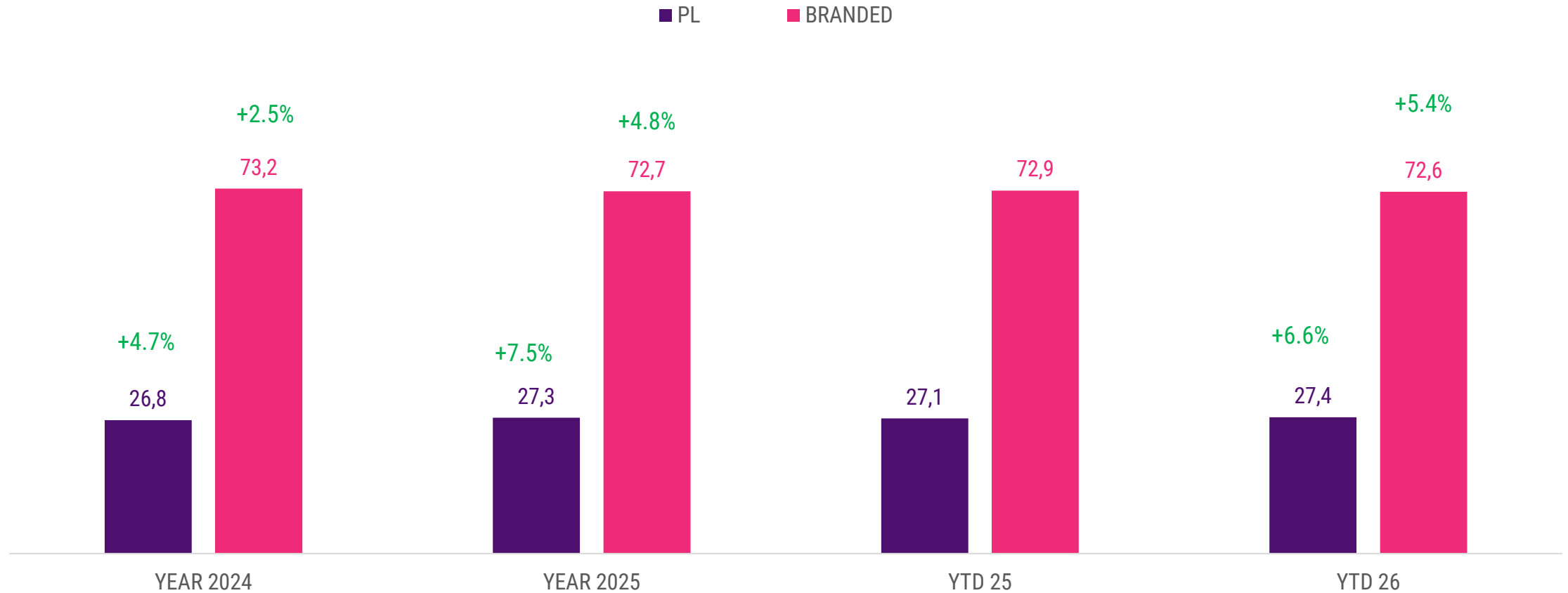
05

Evolution of Private Labels

PL and Branded Value Shares and Trends



PL continue with higher growth rate than Branded in YTD 26



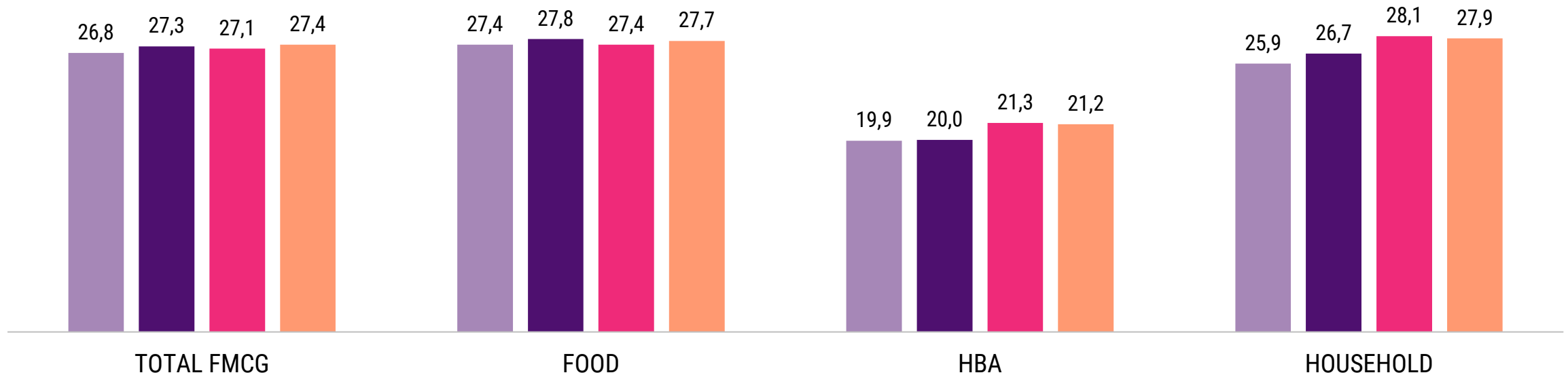
Source: Circana InfoScan, HM/SM, YTD April 26

PL Value Share per Giga Category



Value Share increase for Food in YTD 26

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





06

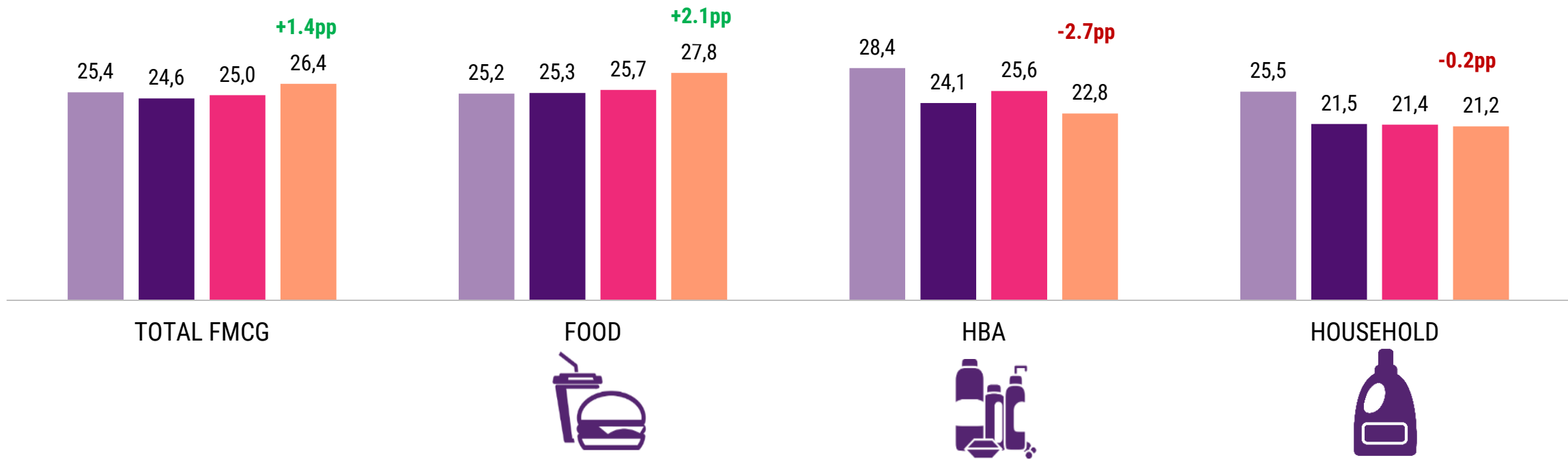
Price Trends & Promo Pressure

%Value Sales due to Temporary Price Reduction

Increased promo intensity for Food in YTD 26



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



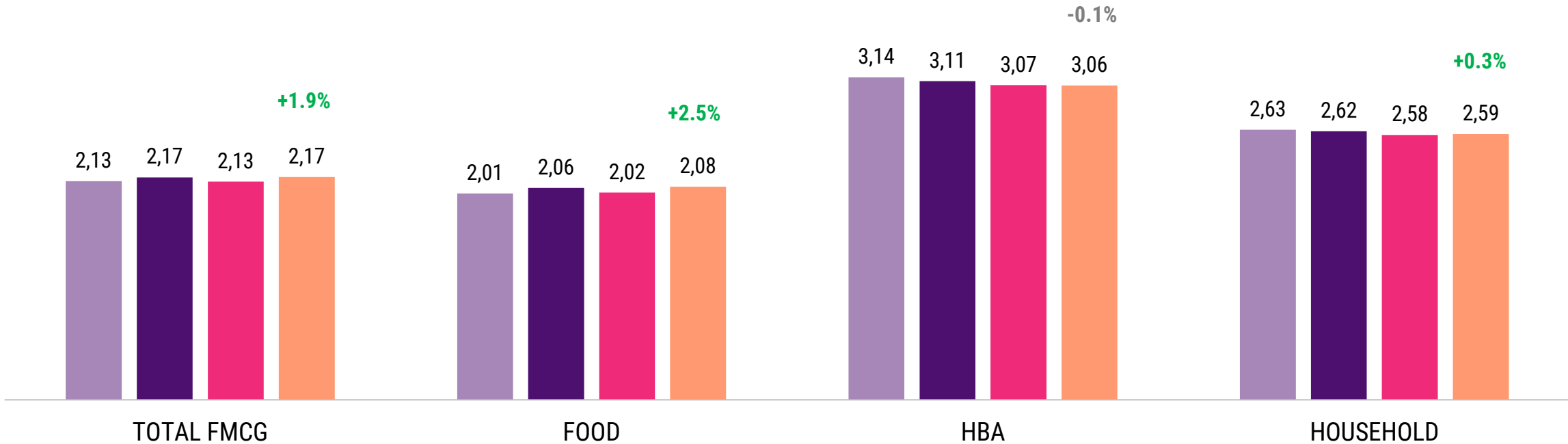
Source: Circana InfoScan, HM/SM, YTD April 26

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 April 26

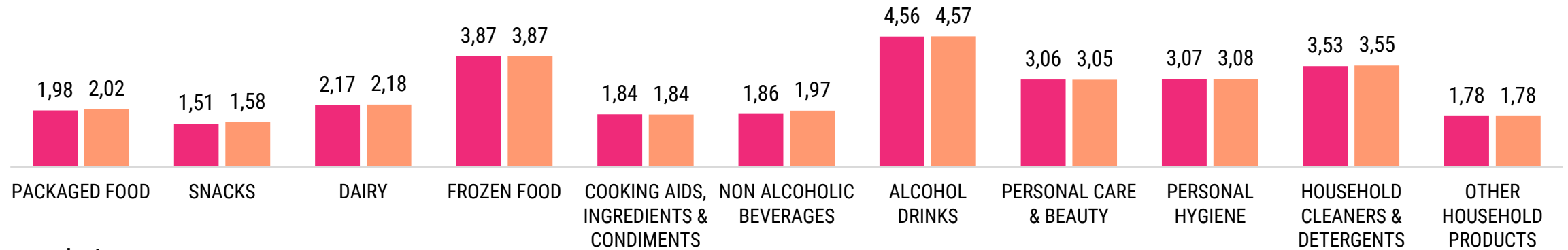
Price per Unit per Category



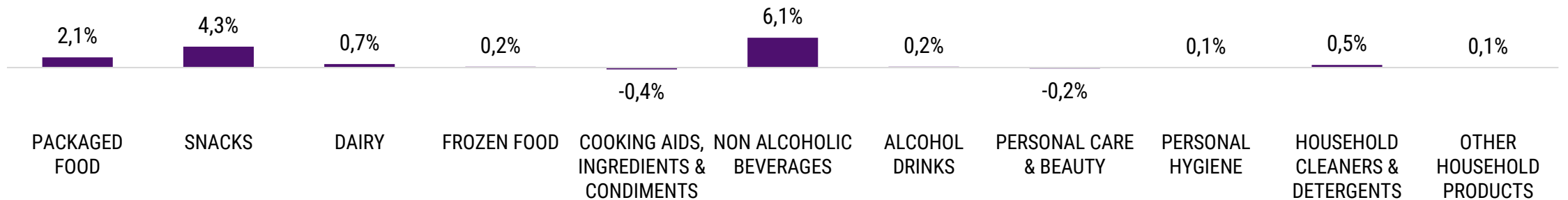
Intense price increase for Non Alcohol and ,secondarily, for Snacking during YTD 26

Price per Unit

■ YTD 2025 ■ YTD 2026



Price evolution



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



07

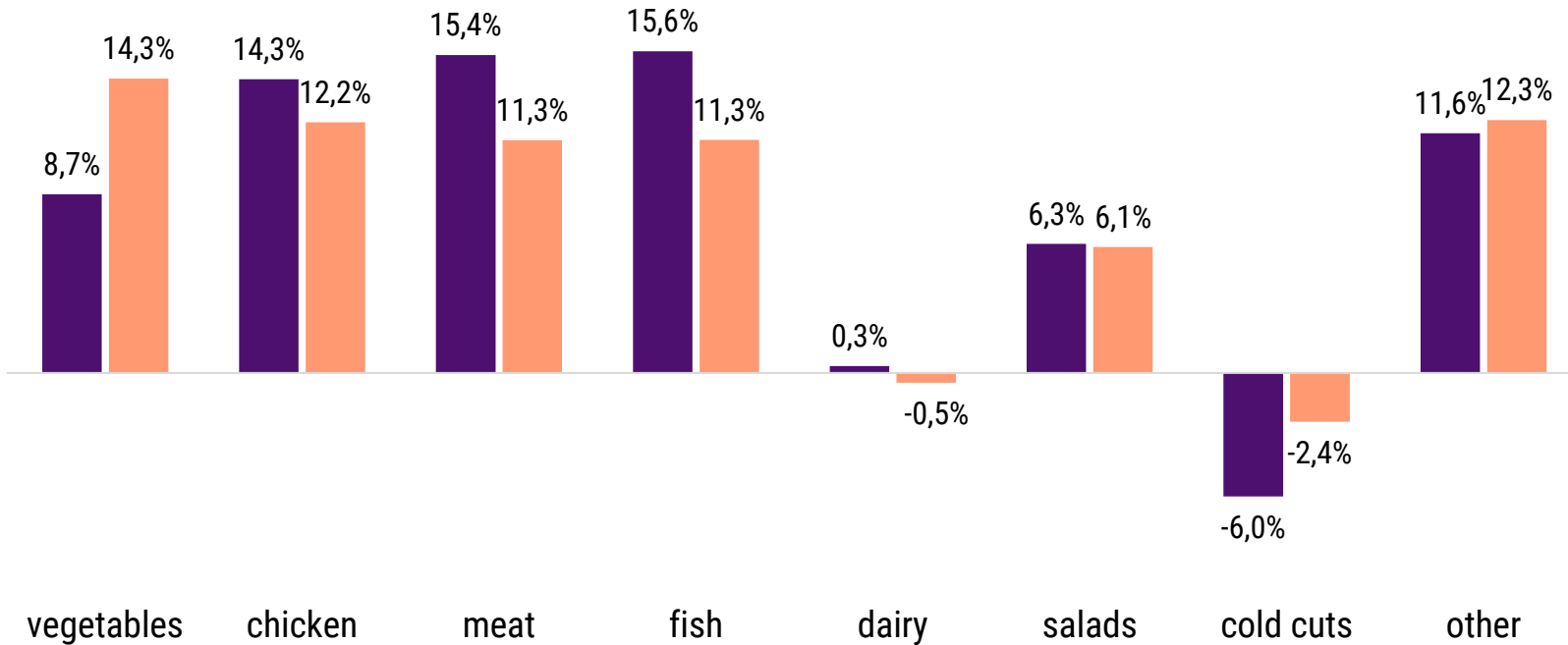
Random
Weight
Categories

Random Weight Value Sales Trend

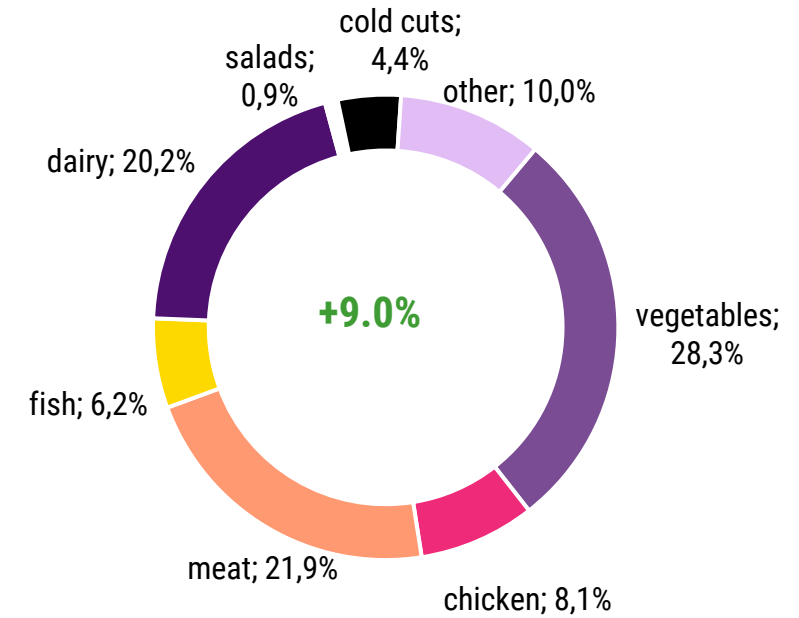


Significant Value Growth during YTD 26 for Random Weight Products, except Dairy and Cold Cuts

■ 2025 ■ YTD 26



YTD 2026 Contribution



Source: Circana Random Weight, YTD April 26



08

Online Grocery Trends Report

eRetail Audit Panel Turnover

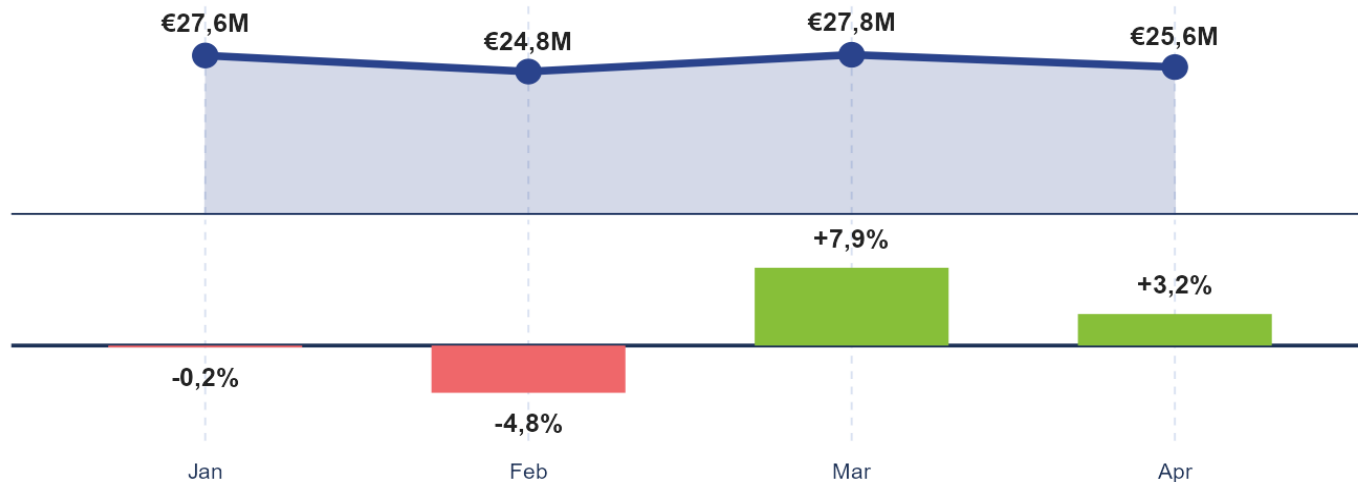
Sales Value incl. VAT

€106M

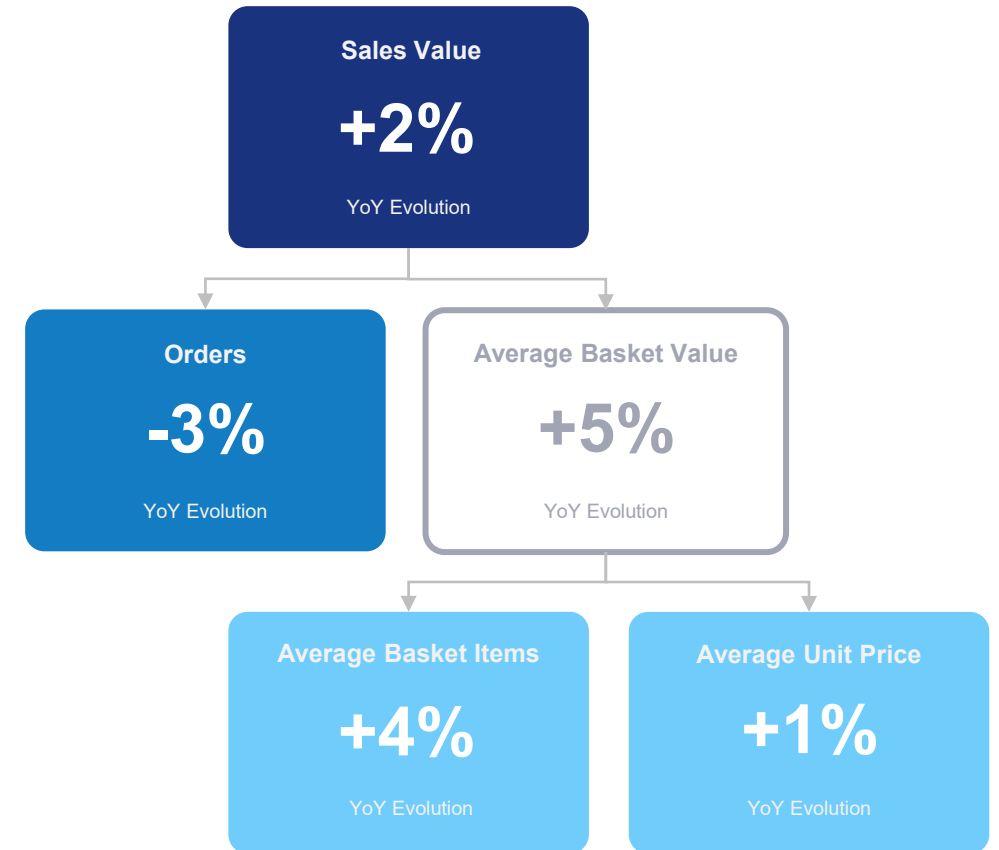
YoY Evolution

+2%

Monthly Sales Value & YoY Evolution



Sales Value Decomposition & Growth Drivers



Mega Categories Overview

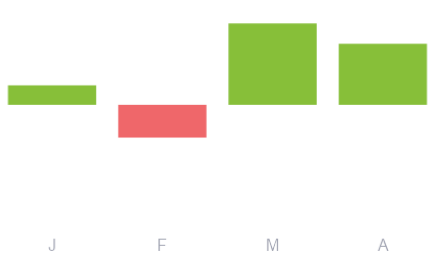
Fresh Food

Sales Value Weight

35% +1pp

YoY Evolution in Sales Value

+4%



Contribution to Growth

+1pp

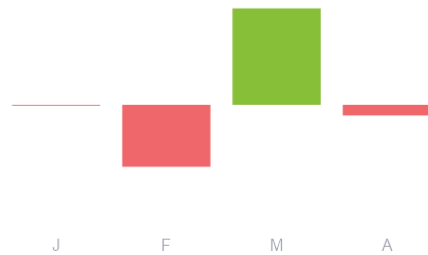
Basic Packaged Food

Sales Value Weight

22% 0pp

YoY Evolution in Sales Value

+1%



Contribution to Growth

0pp

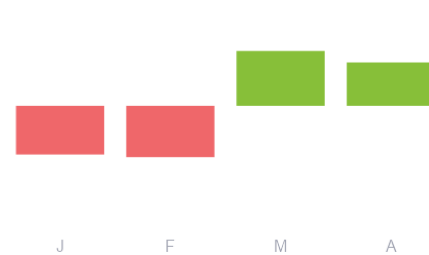
Cleaning Products & Paper for Household Use

Sales Value Weight

13% 0pp

YoY Evolution in Sales Value

0%



Contribution to Growth

0pp

Bottled Beverages, Soft Drinks, Water & Drink Mixes

Sales Value Weight

10% 0pp

YoY Evolution in Sales Value

-2%



Contribution to Growth

0pp

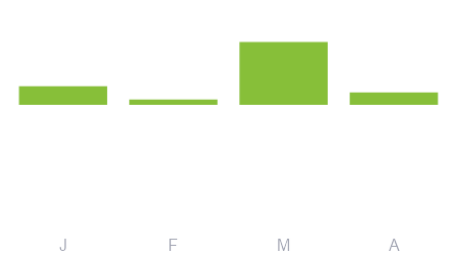
Frozen foods

Sales Value Weight

6% 0pp

YoY Evolution in Sales Value

+3%



Contribution to Growth

0pp

Mega Categories Overview

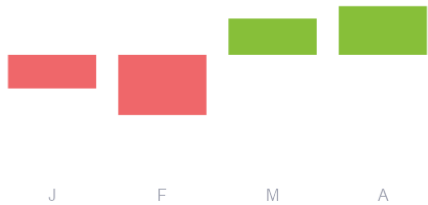
Beauty & Health

Sales Value Weight

5% 0pp

YoY Evolution in Sales Value

0%



Contribution to Growth

0pp

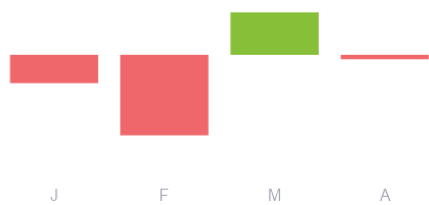
Bakery

Sales Value Weight

4% 0pp

YoY Evolution in Sales Value

-2%



Contribution to Growth

0pp

Baby & Kid

Sales Value Weight

3% 0pp

YoY Evolution in Sales Value

-10%



Contribution to Growth

0pp

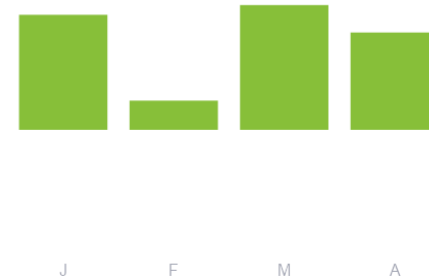
Pet Supplies

Sales Value Weight

1% 0pp

YoY Evolution in Sales Value

+10%



Contribution to Growth

0pp

Thank you

