



MARKET VIEW YTD June 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

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 + Islands

04 PERIODS

YR 2025 vs YR 2024
YTD June 2026 vs YTD June 2025

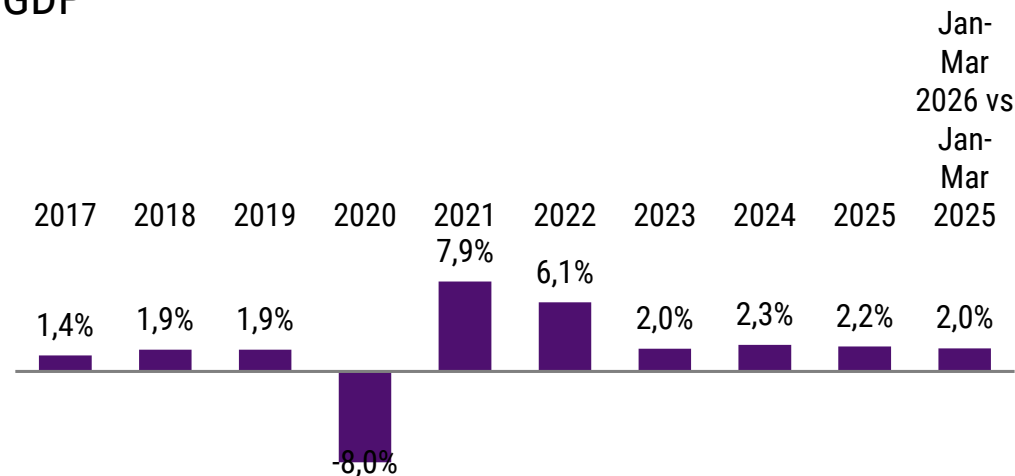


01

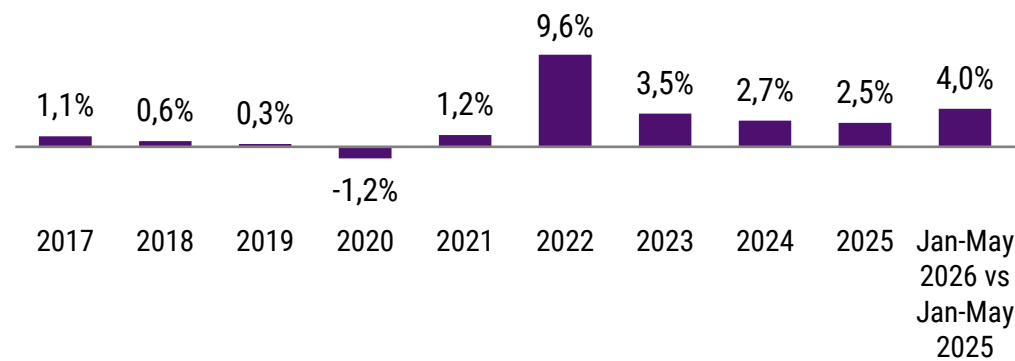
Greek Economy

Greek Economy

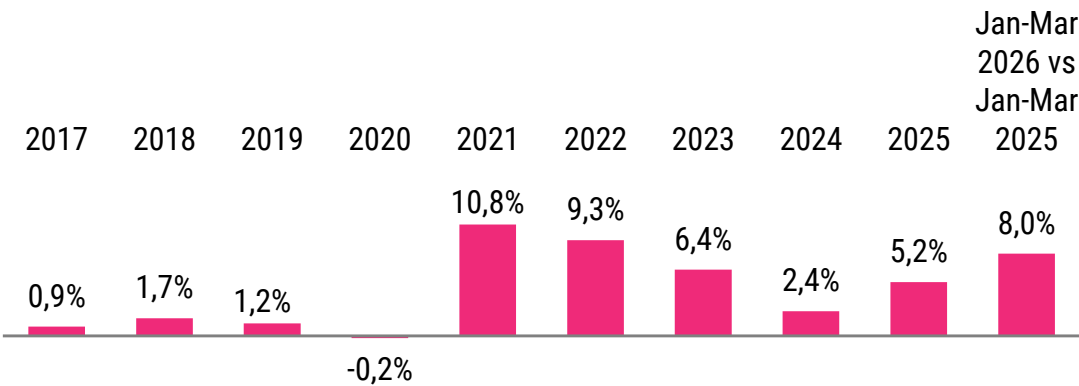
GDP



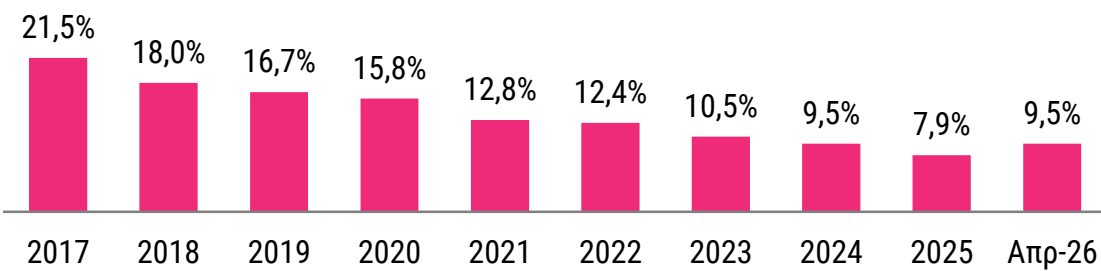
INFLATION RATE TREND



RETAIL TURNOVER INDEX (w.o AUTOMOTIVE FUEL)



UNEMPLOYMENT





02

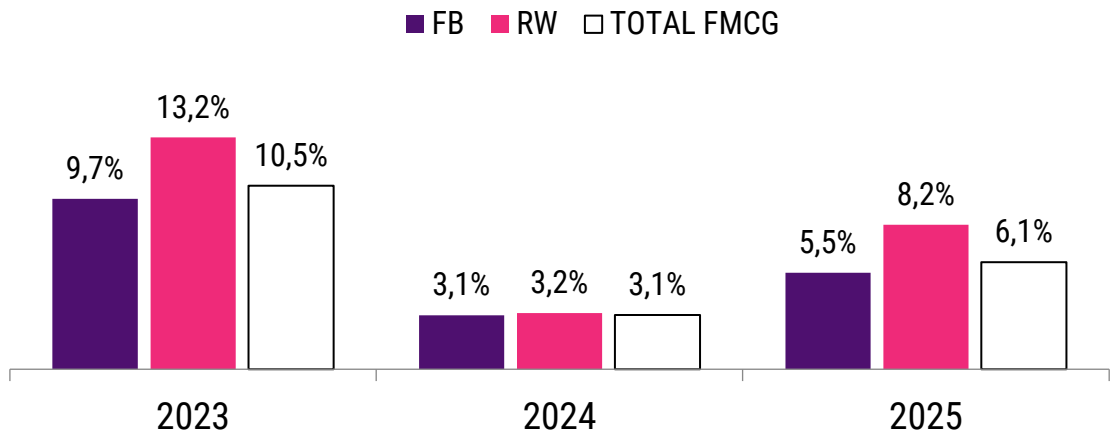
Trends for FMCG Market

Fixed Barcodes + Random Weight

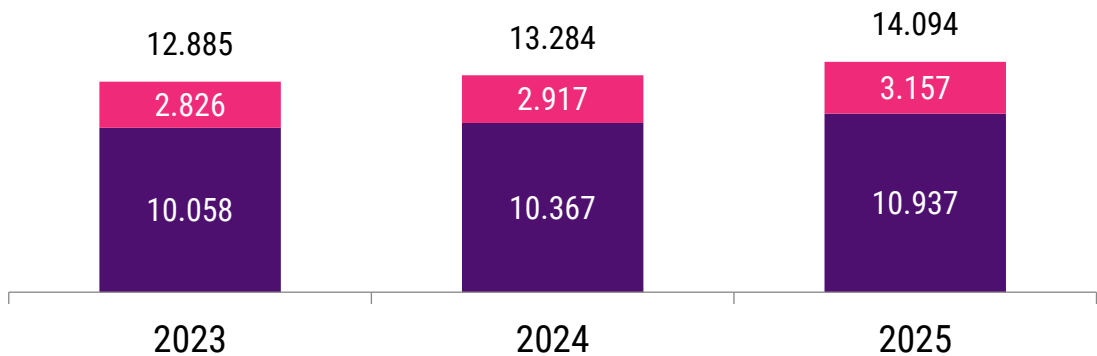
FMCG Value Sales Trend – Year 2025



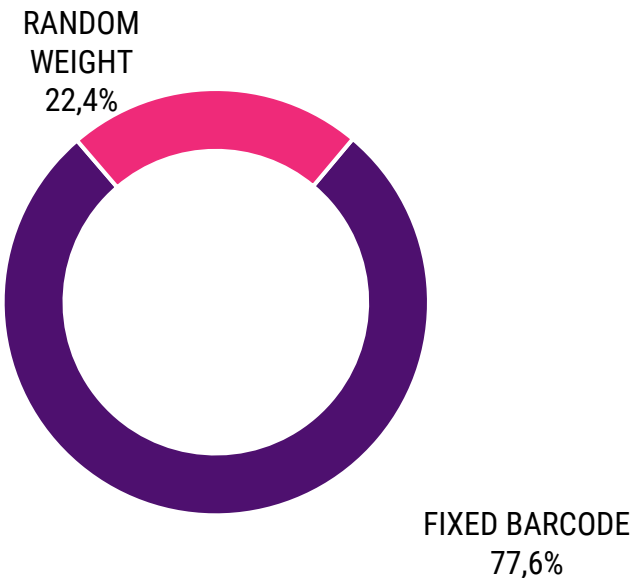
Growth by 6.1% for Total FMCG Market in 2025, coming from both Segments



Value Sales (in Millions)



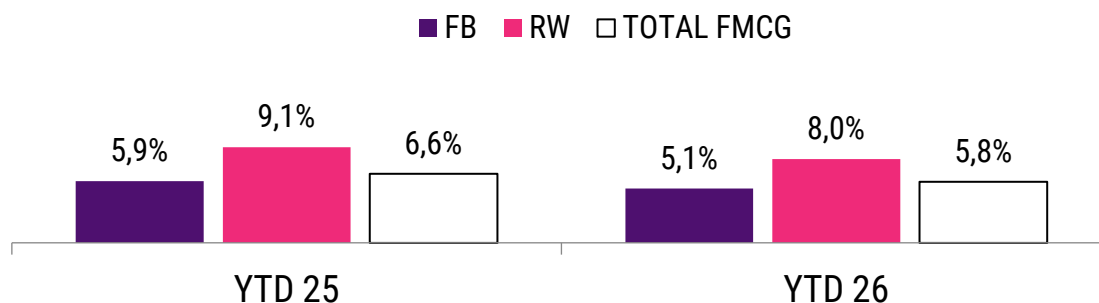
2025 Value Contribution



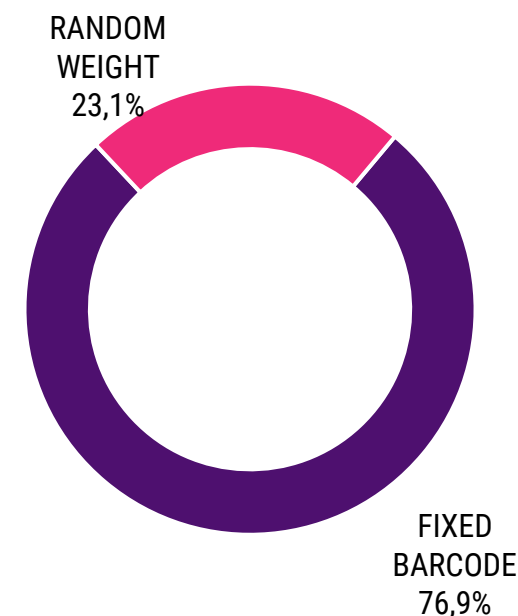
FMCG Value Sales Trend – YTD



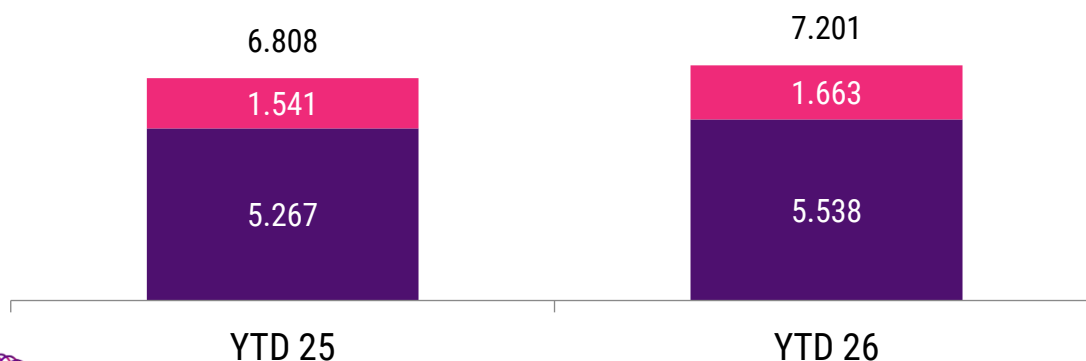
Increase for Total FMCG in YTD 26 (+5.8%) due to both Segments (more intense for RW)



YTD 26 Value Contribution



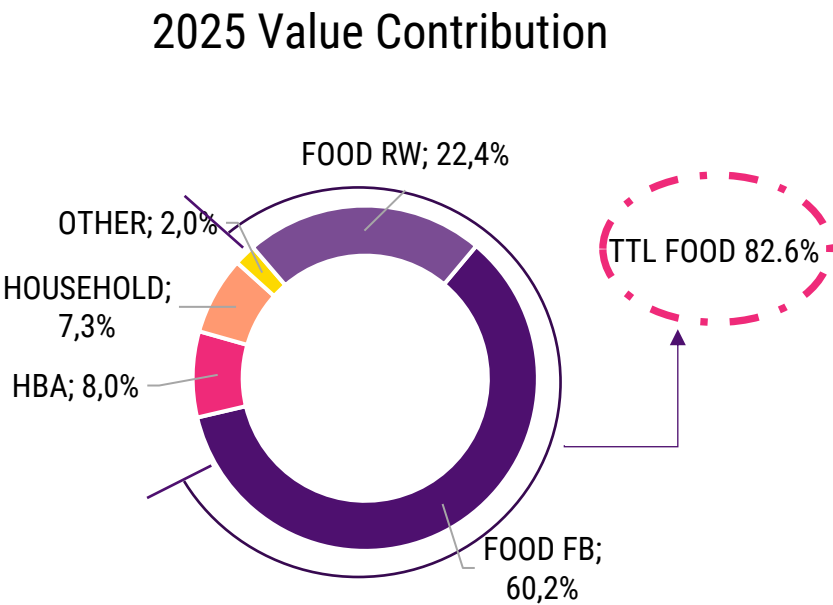
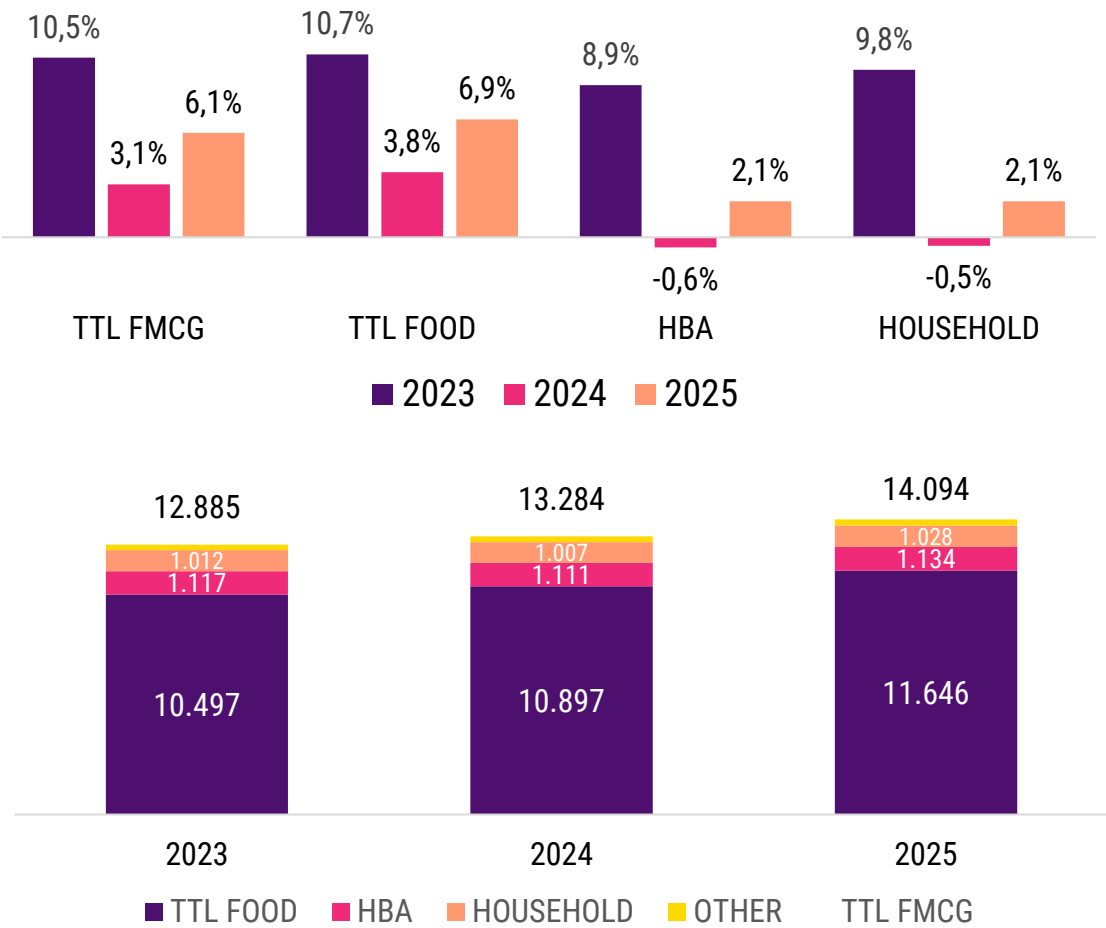
Value Sales (in Millions)



FMCG Value Sales Trend – Year 2025



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

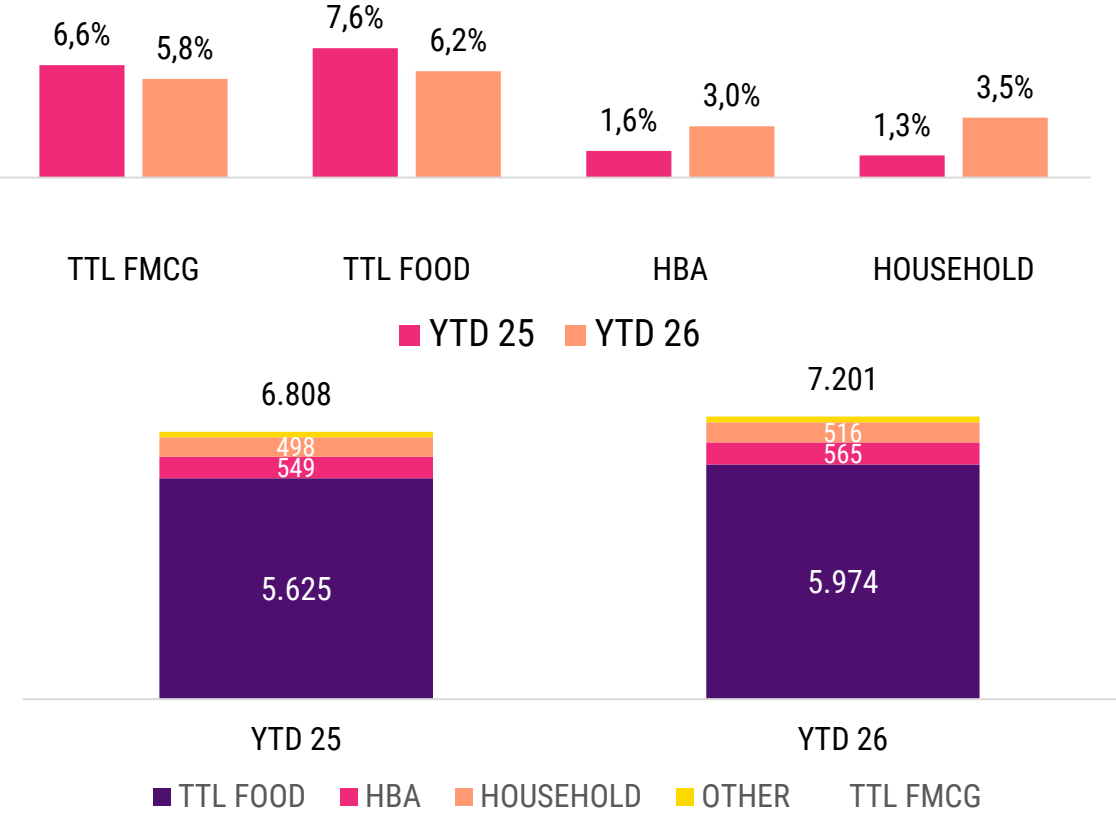


Source: Circana InfoScan, HM/SM + Random Weight, Year 2025

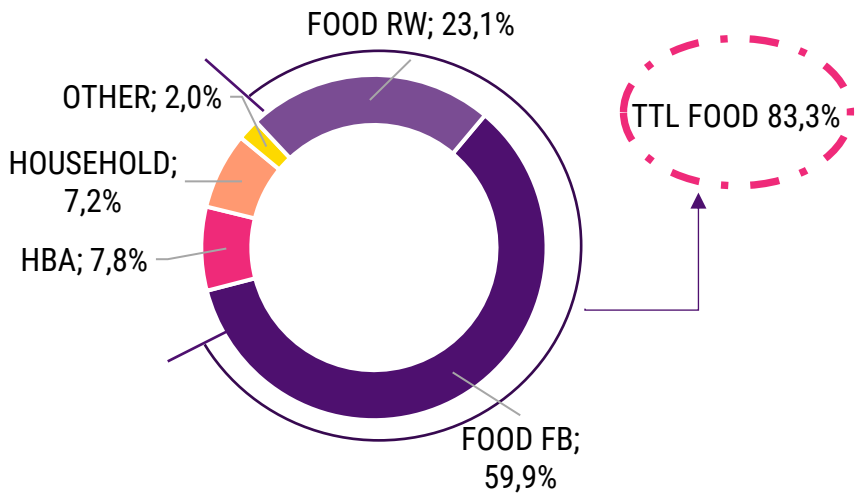
FMCG Value Sales Trend – YTD



Food manages the highest increase in YTD 26. Better Performance for Non Food compared to previous Year



YTD 26 Value Contribution





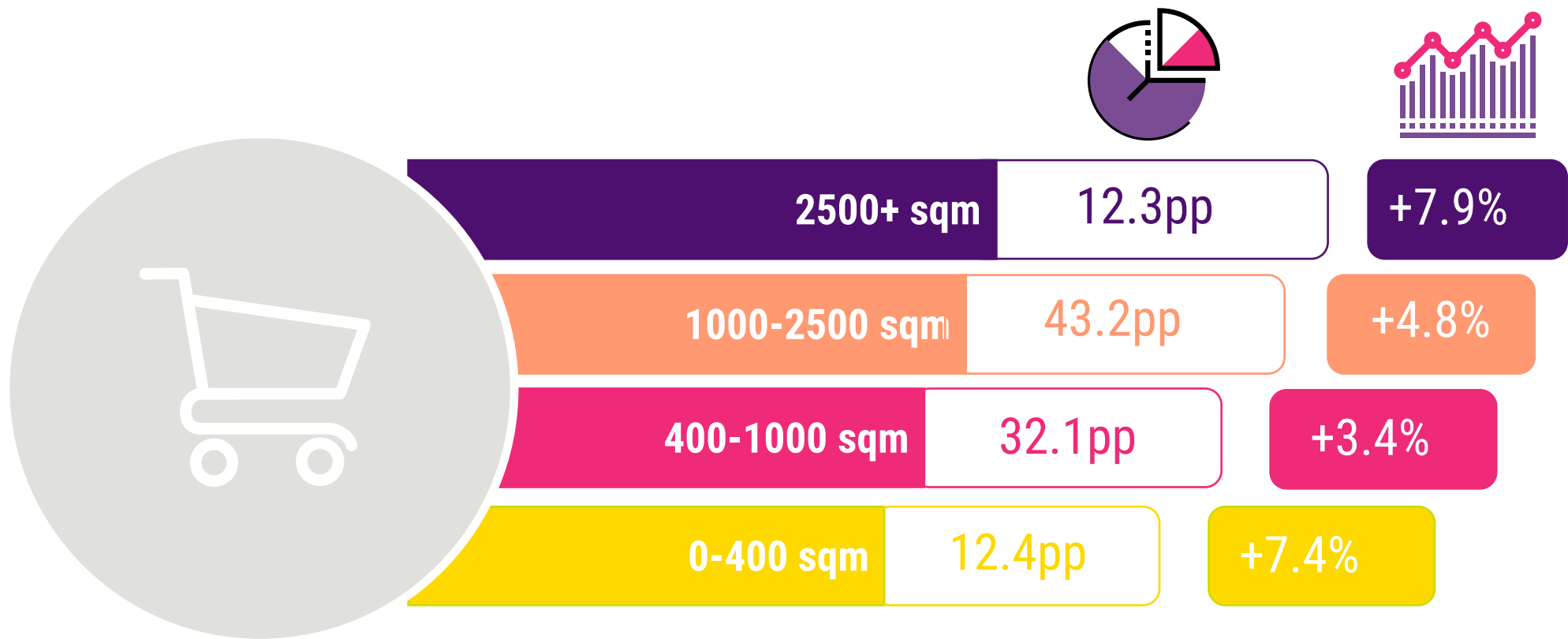
03

Trends for FMCG Market

Fixed Barcodes

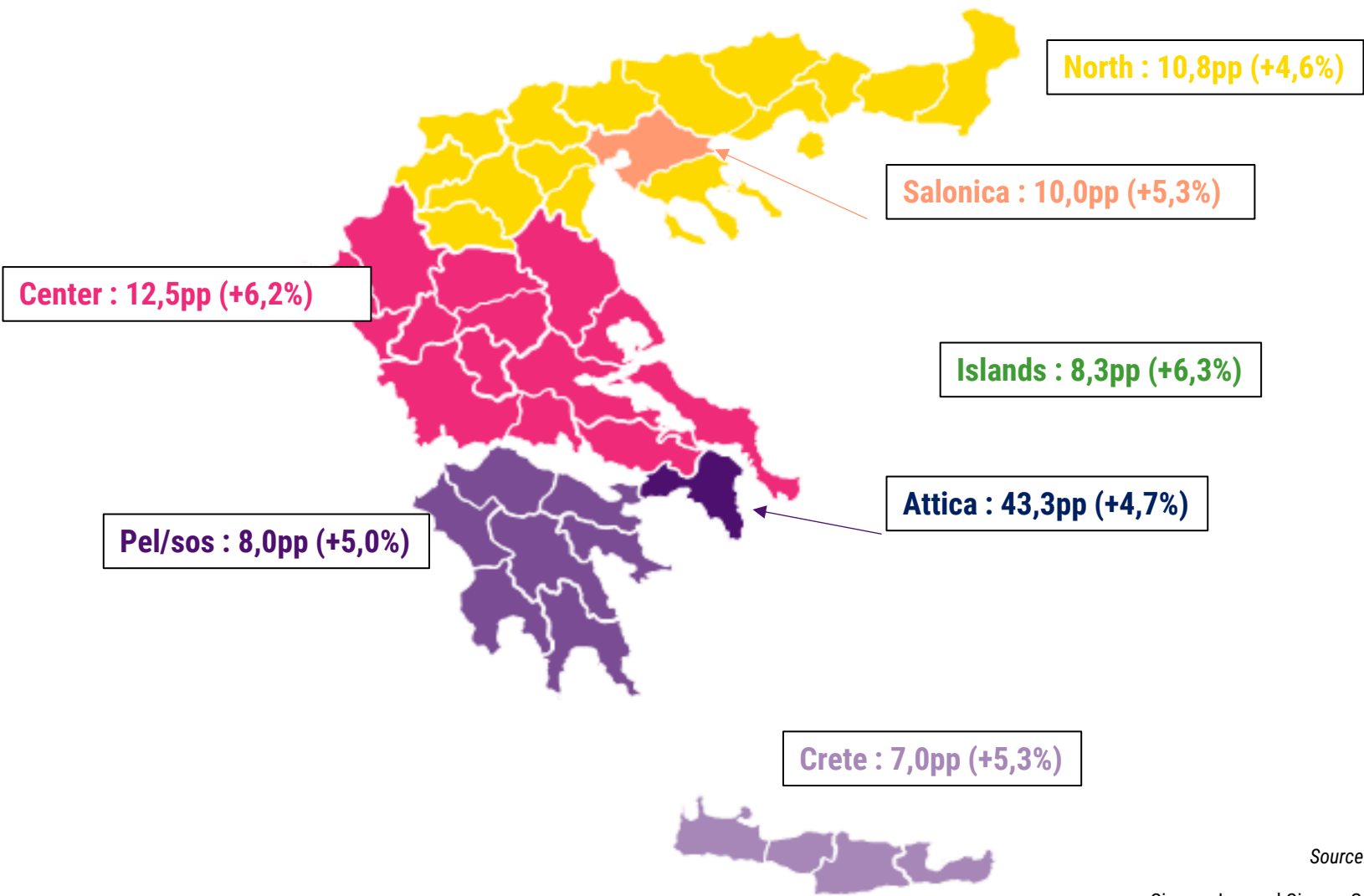
FMCG Value Sales Trends per Store Type YTD

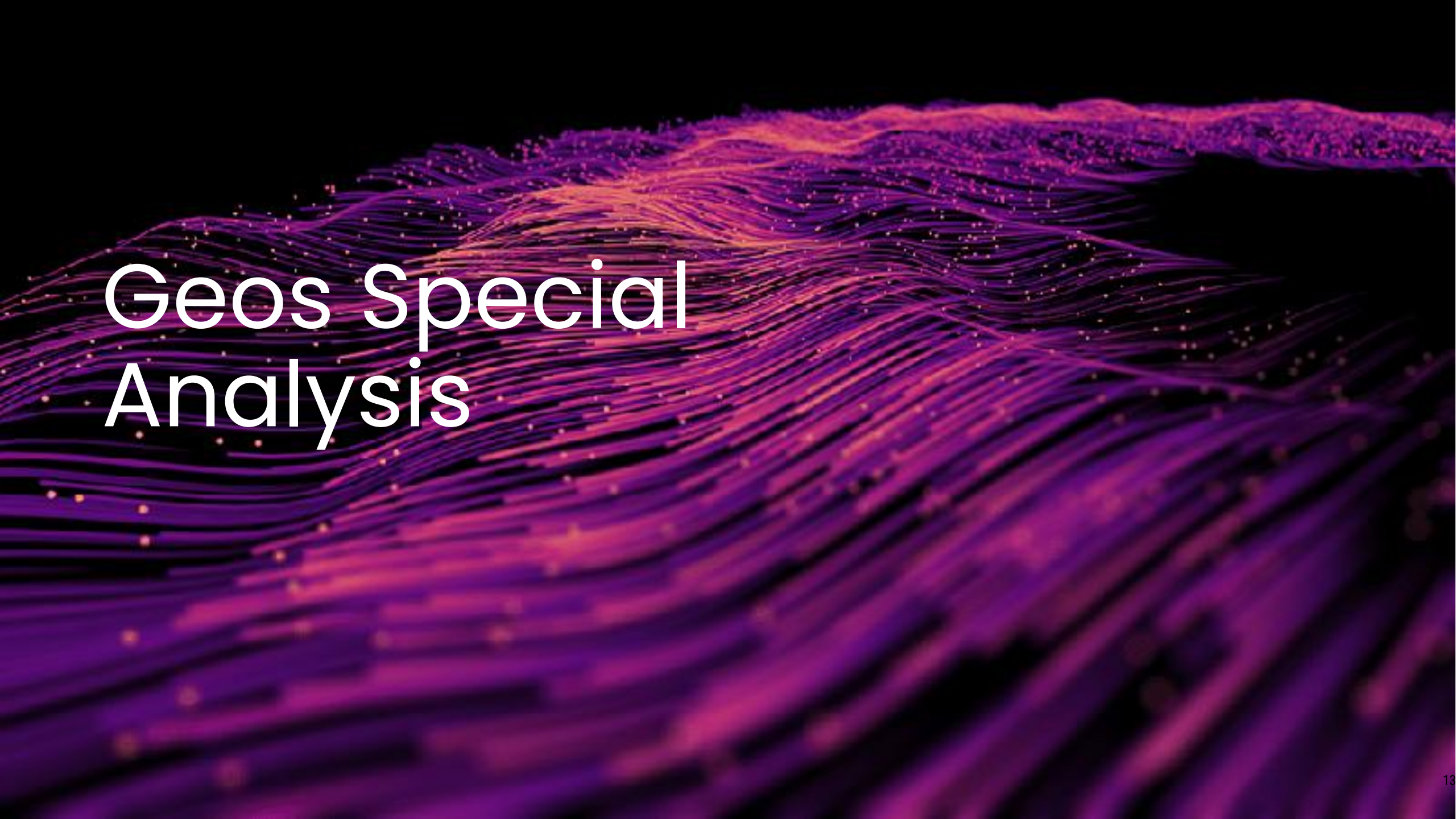
All Shop Types achieve growth during YTD 26, less intense for Medium SMs



 **Excl. Islands**

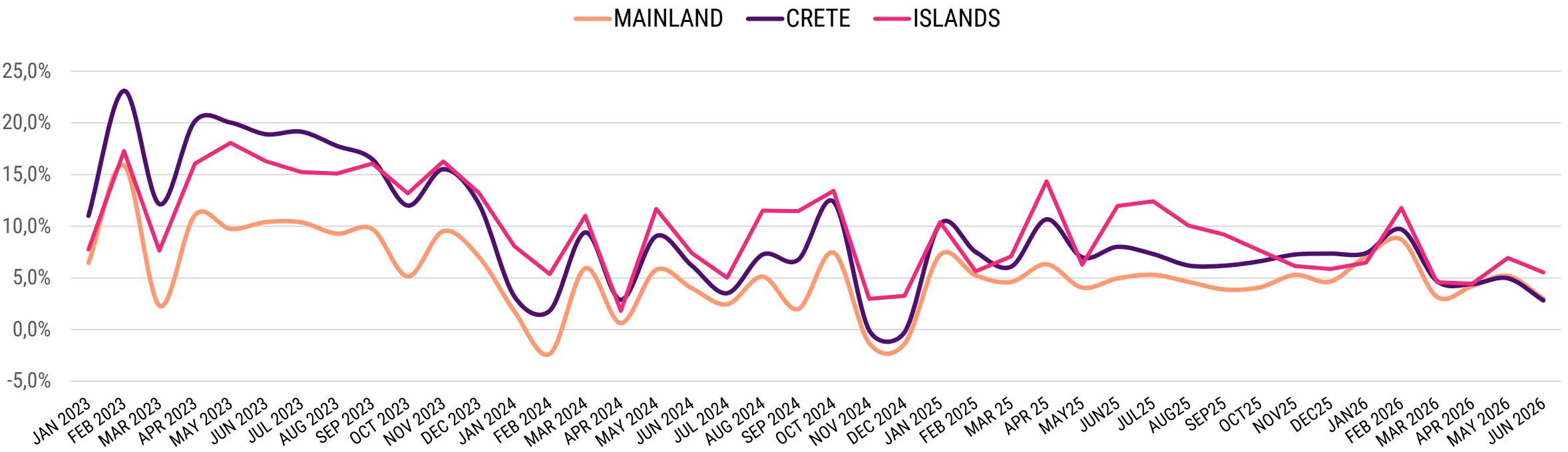
FMCG Value Sales Trends per Geo YTD



The background of the slide is a dynamic, abstract composition. It features a series of wavy, undulating lines that flow across the frame from left to right. These lines are rendered in a vibrant palette of purple, magenta, and hints of orange, giving them a glowing, ethereal quality. The lines vary in thickness and intensity, creating a sense of depth and movement. They are set against a solid black background, which makes the colorful lines stand out prominently. The overall effect is reminiscent of a digital data visualization or a stylized representation of a natural phenomenon like a nebula or a seismic wave.

Geos Special Analysis

FMCG Monthly Value Growth

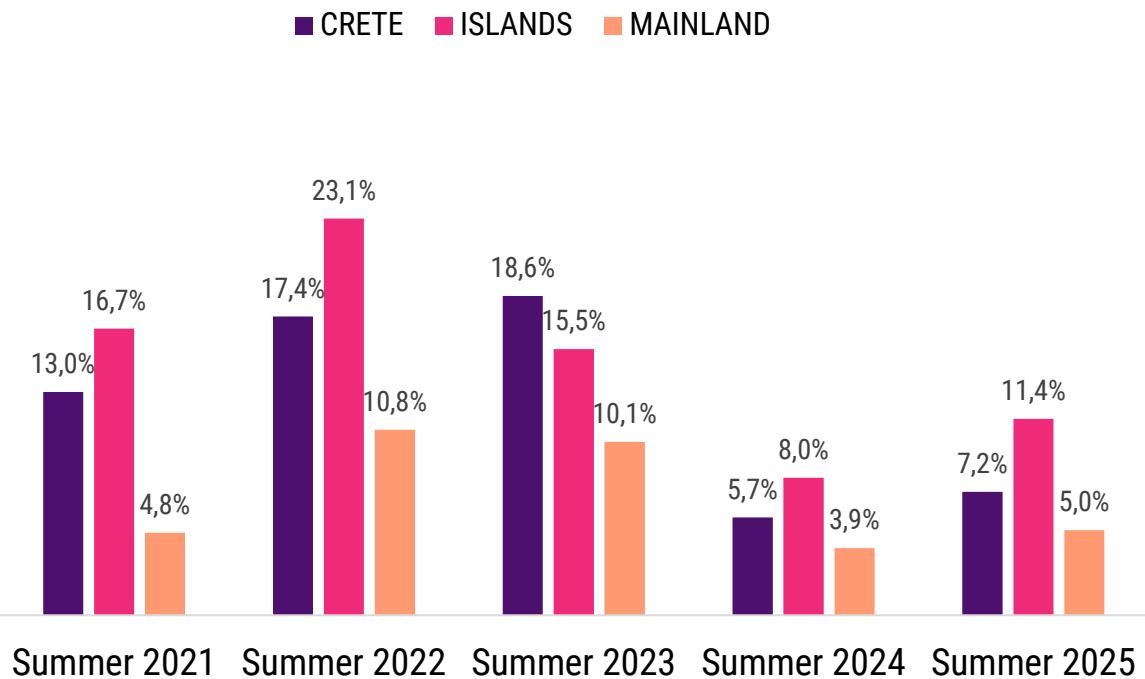


FMCG Value Growth during Summers

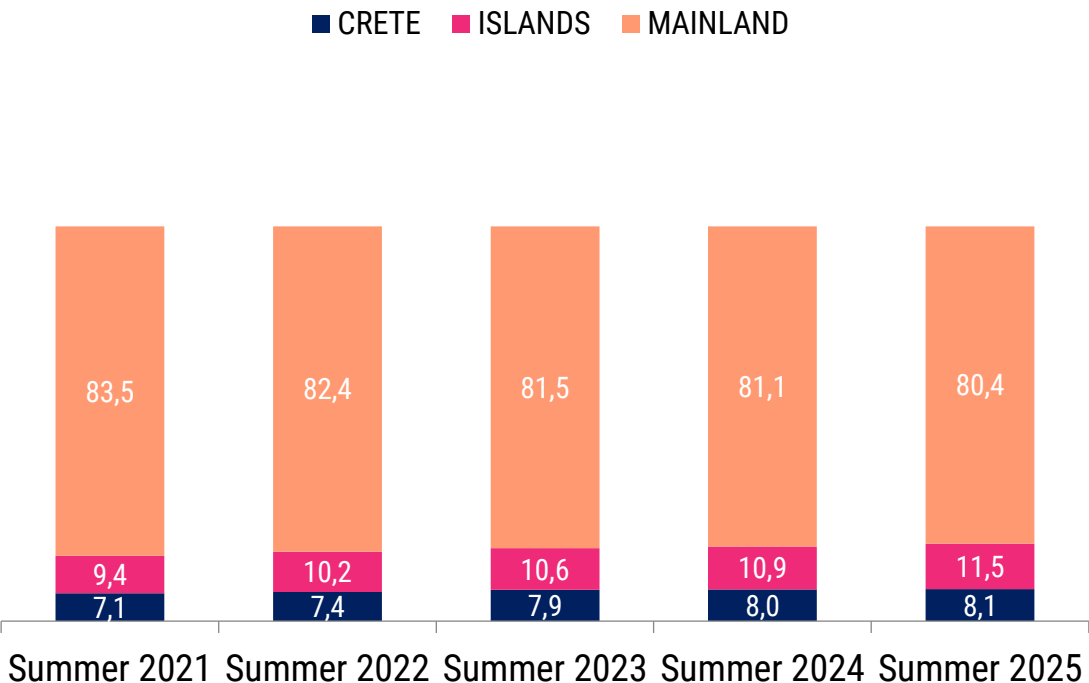


Intense growth during Summers for Islands and Crete

Value Growth



Value Contribution



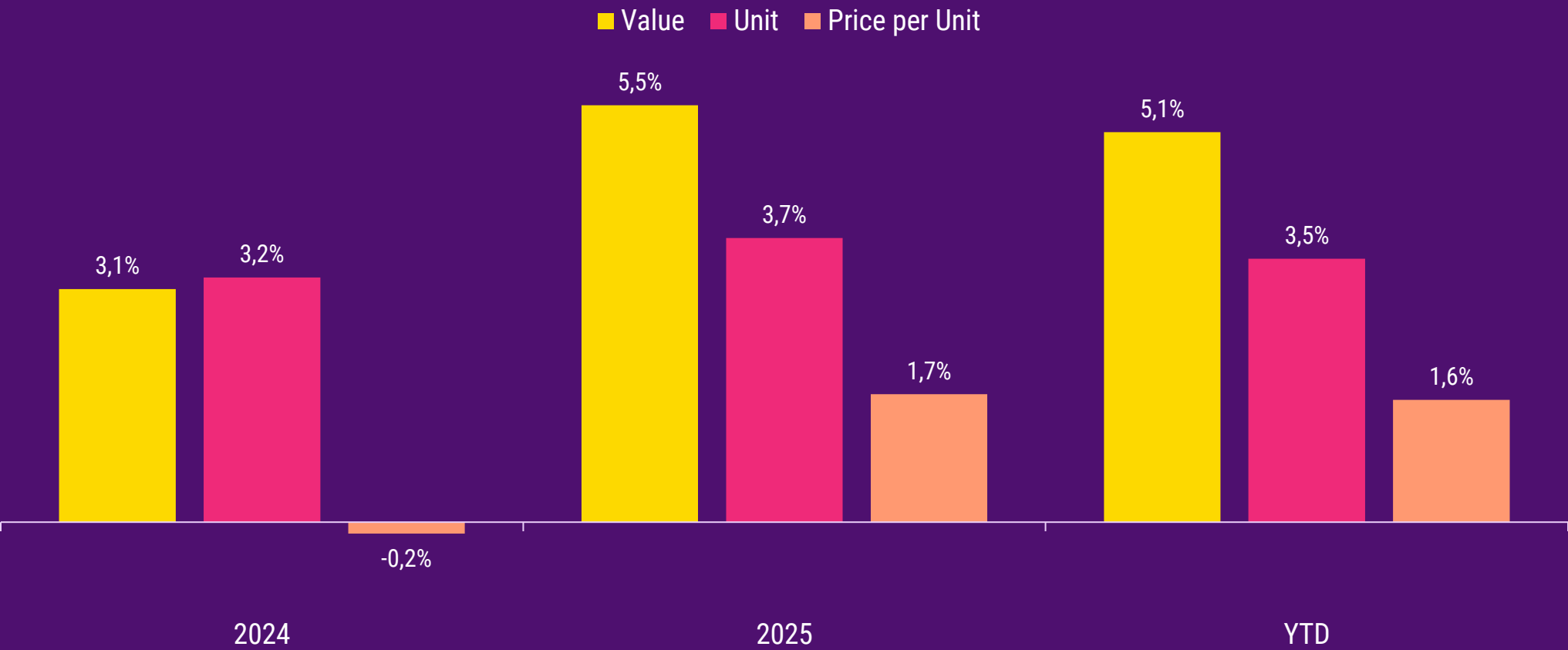
The background is a dark, abstract composition featuring a dense field of thin, flowing lines in shades of purple and magenta. These lines are interspersed with small, bright orange and yellow particles, creating a sense of dynamic movement and depth. The overall effect is reminiscent of a digital landscape or a complex data visualization.

Price Analysis

FMCG Price Trends

More intense increase in Value during YTD 26

 **Incl. Islands**

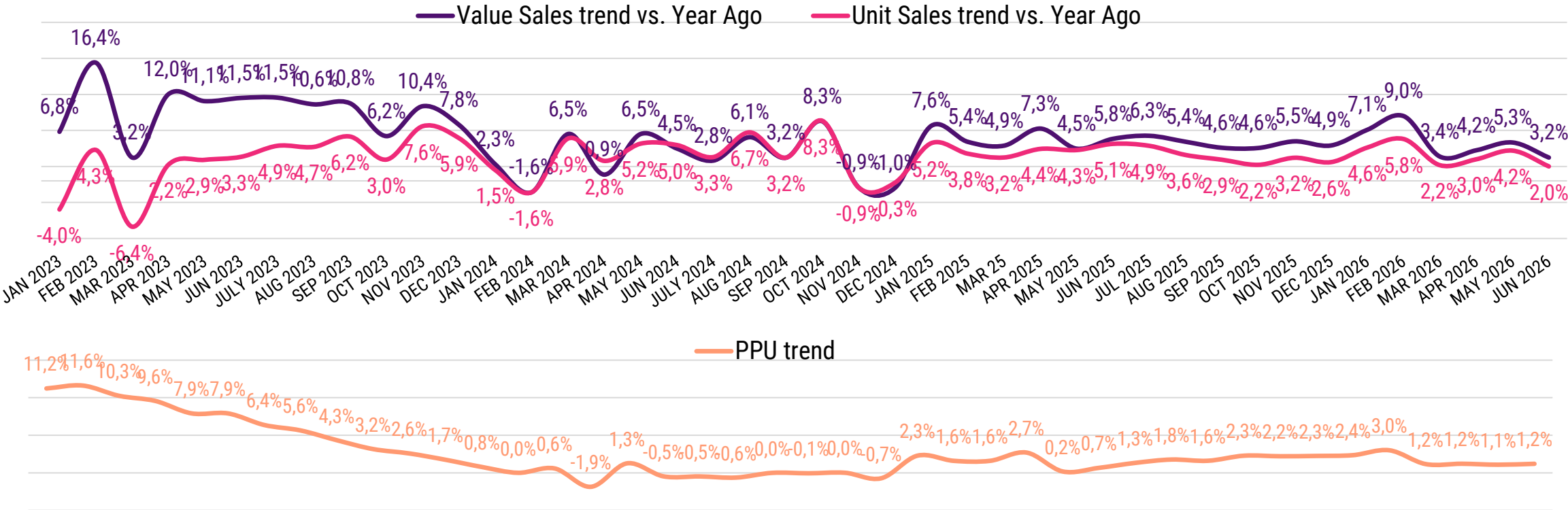


FMCG Value and Unit Monthly Trends



Lower gap between value and unit growth during the last months

YR 2024: **+3.1%**
YR 2025: **+5.5%**
YTD 2026: **+5.1%**



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



04

Giga Categories Evolution

Giga Categories Value Sales Trend

Food manages the highest increase in YTD 26

 **Incl. Islands**

YTD 2026



+5.6%



+3.0%



+3.5%

Food

Health & Beauty

Household

2025



+6.4%



+2.1%

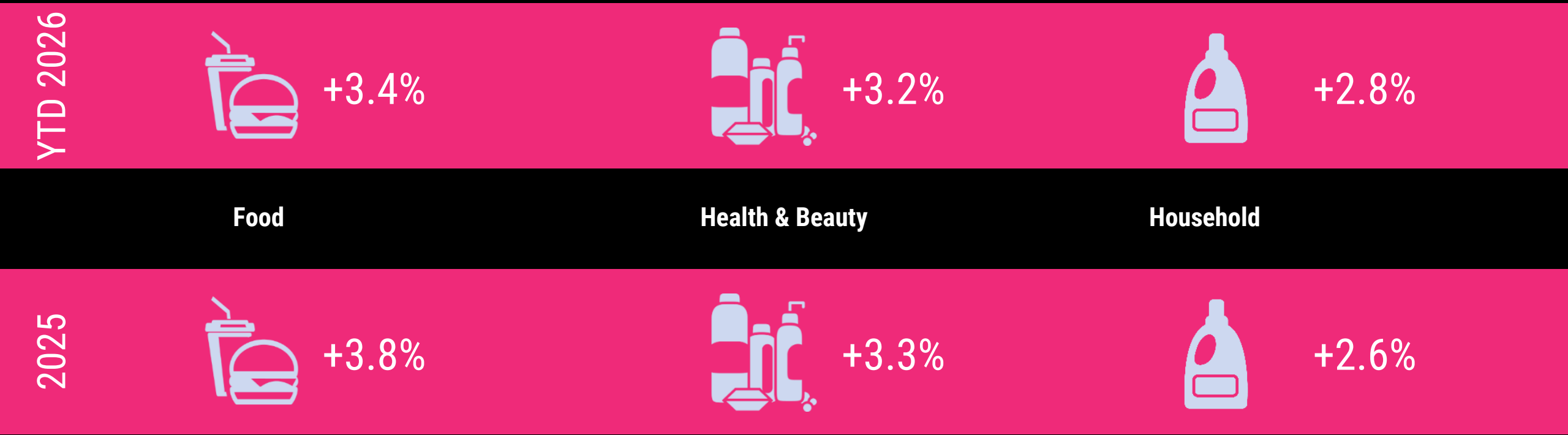


+2.1%

Giga Categories Unit Sales Trend

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

 **Incl. Islands**

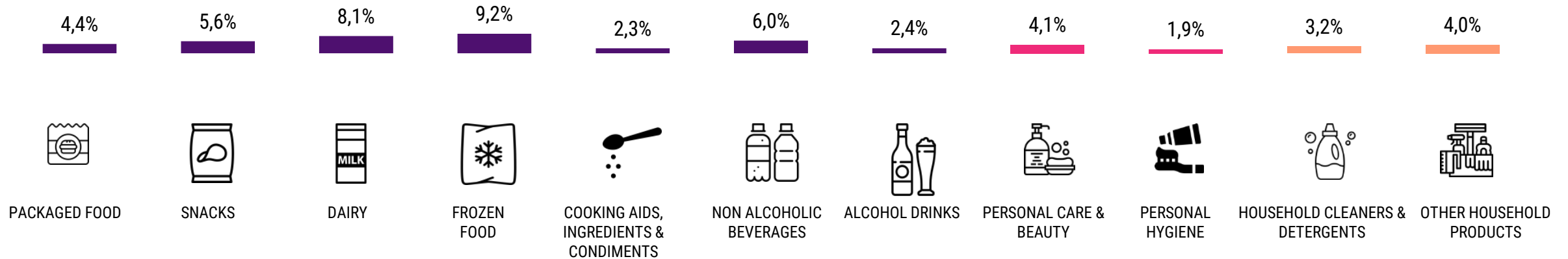


Categories Value Sales Trend YTD

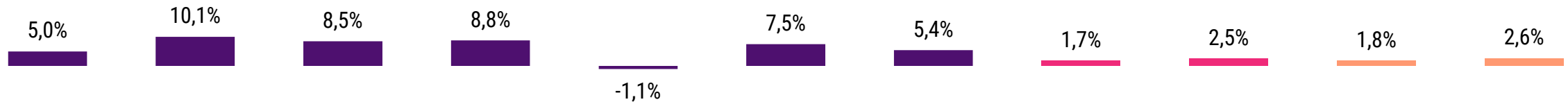


Value Sales improvement for all Categories (especially for Frozen & Dairy) in YTD 26

Value Sales Trend YTD 2026



Value Sales Trend 2025



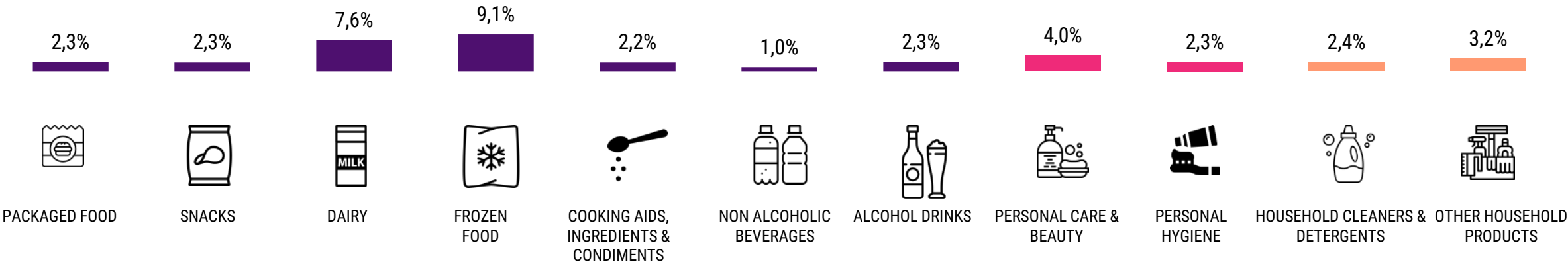
Source: Circana InfoScan, HM/SM, YTD June 26

FMCG Unit Sales Trend YTD

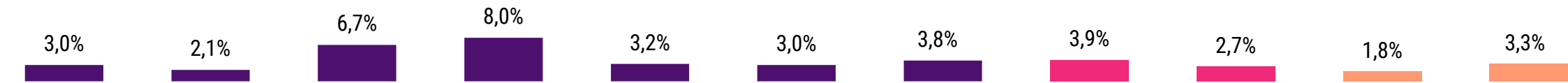


Significant growth for Frozen and Dairy, consistent with their values performance

Unit Sales Trend YTD 2026



Unit Sales Trend 2025



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



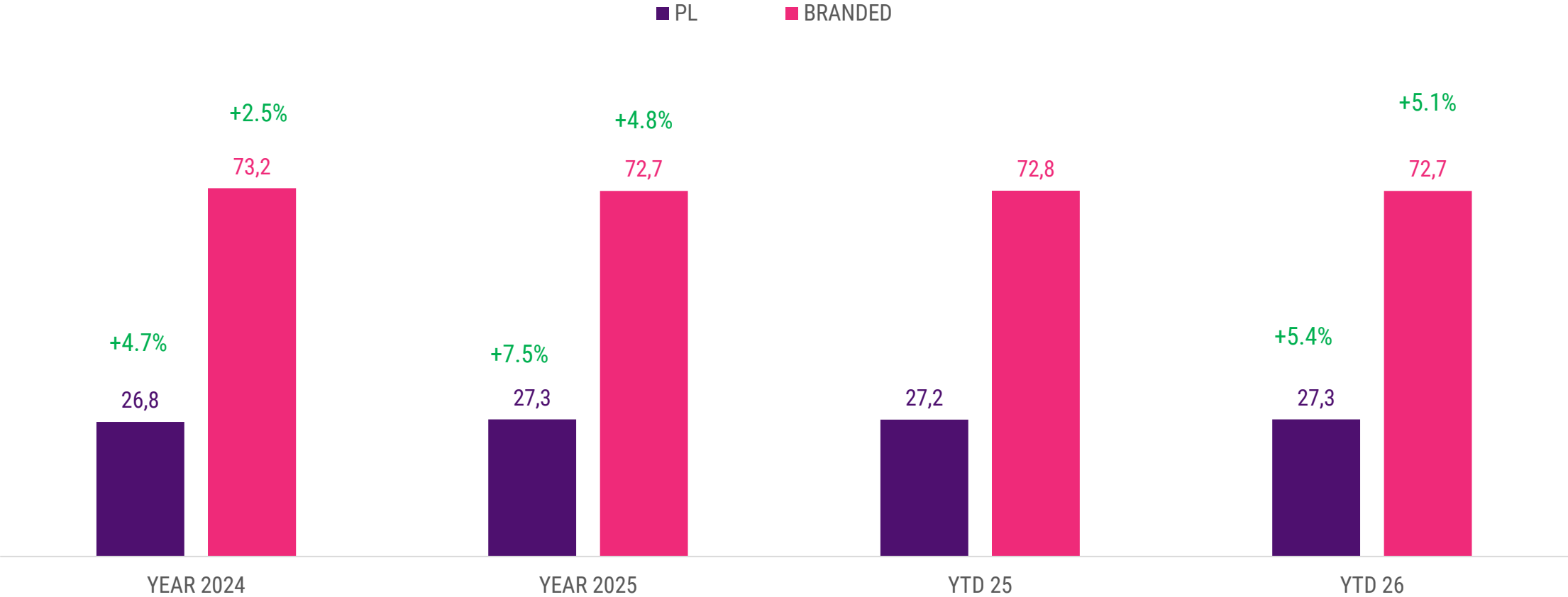
05

Evolution of Private Labels

PL and Branded Value Shares and Trends



Almost same growth rate for PL and Branded in YTD 26

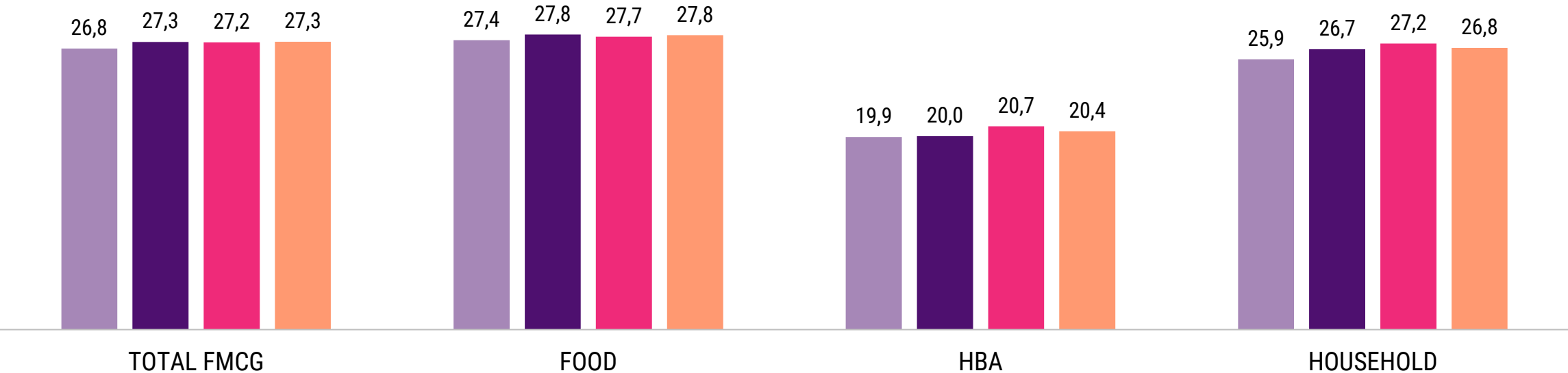


Source: Circana InfoScan, HM/SM, YTD June 26

PL Value Share per Giga Category



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





06

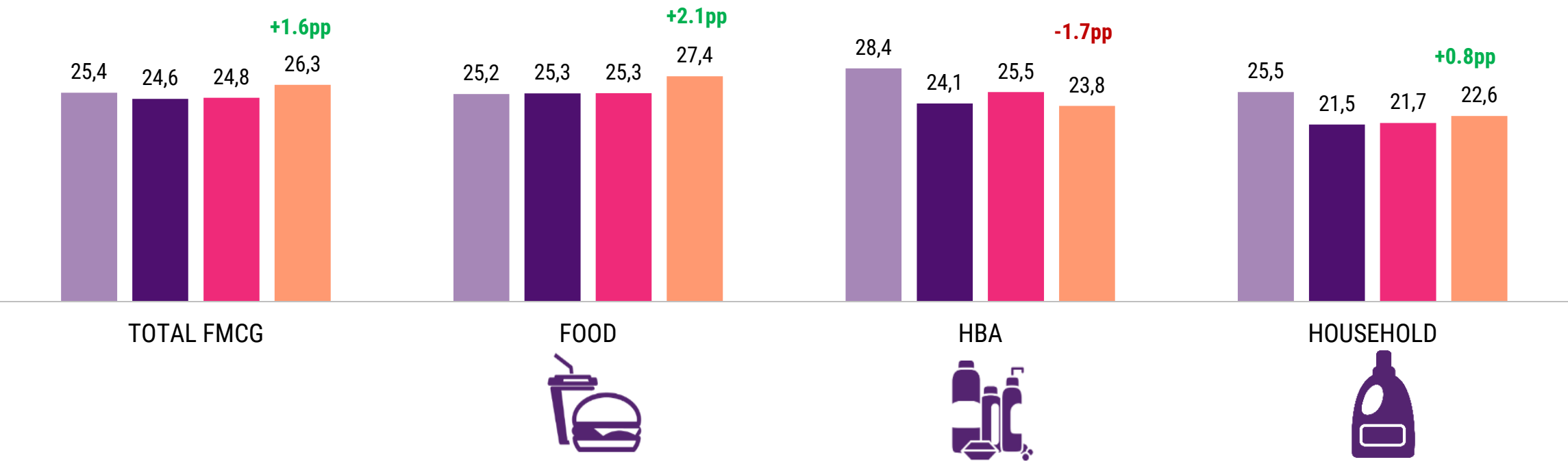
Price Trends & Promo Pressure

%Value Sales due to Temporary Price Reduction

Increased promo intensity for Food in YTD 26

 Incl. Islands

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

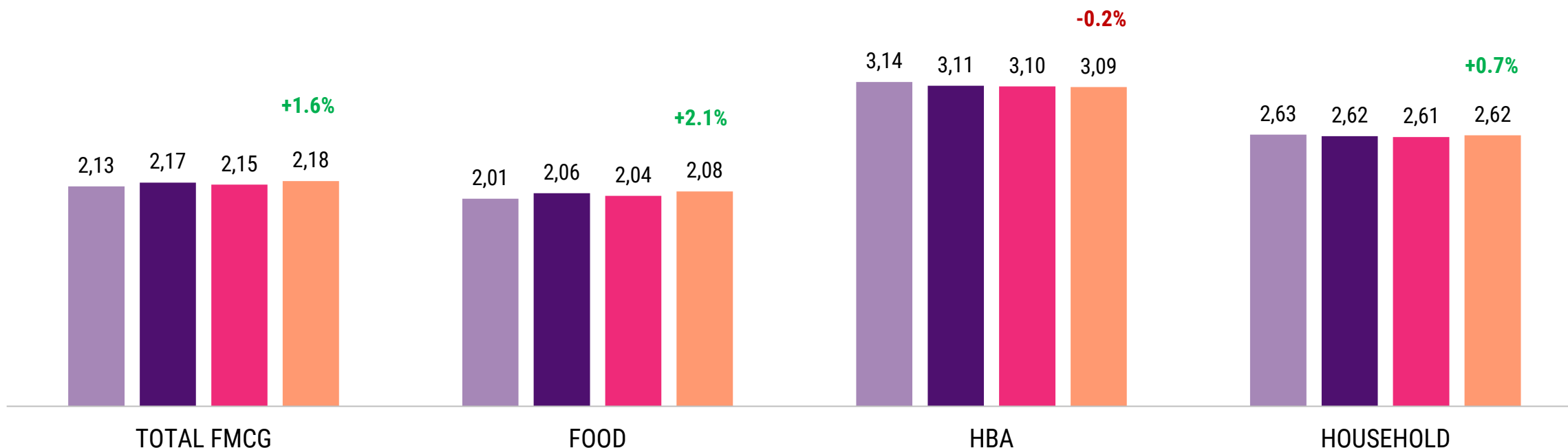


Price per Unit per Giga Category



Price increase for Food influences total FMCG in YTD 26

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



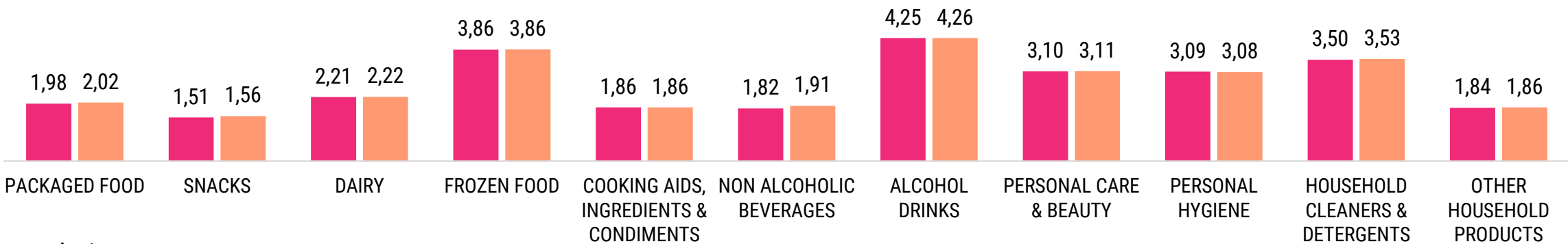
Price per Unit per Category



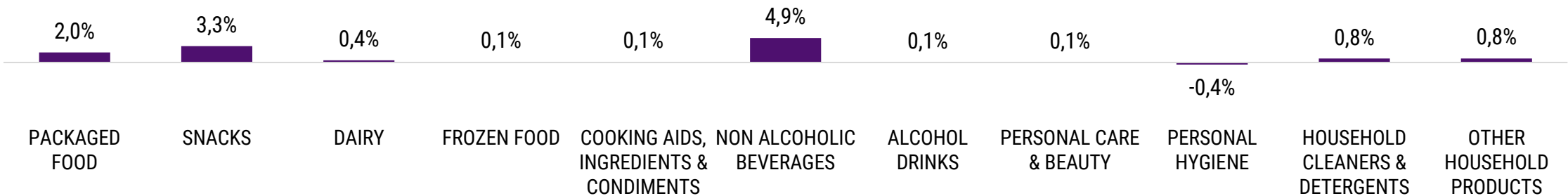
Price increase for Non Alcohol and ,secondarily, for Snacking during YTD 26

Price per Unit

■ YTD 2025 ■ YTD 2026



Price evolution



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



07

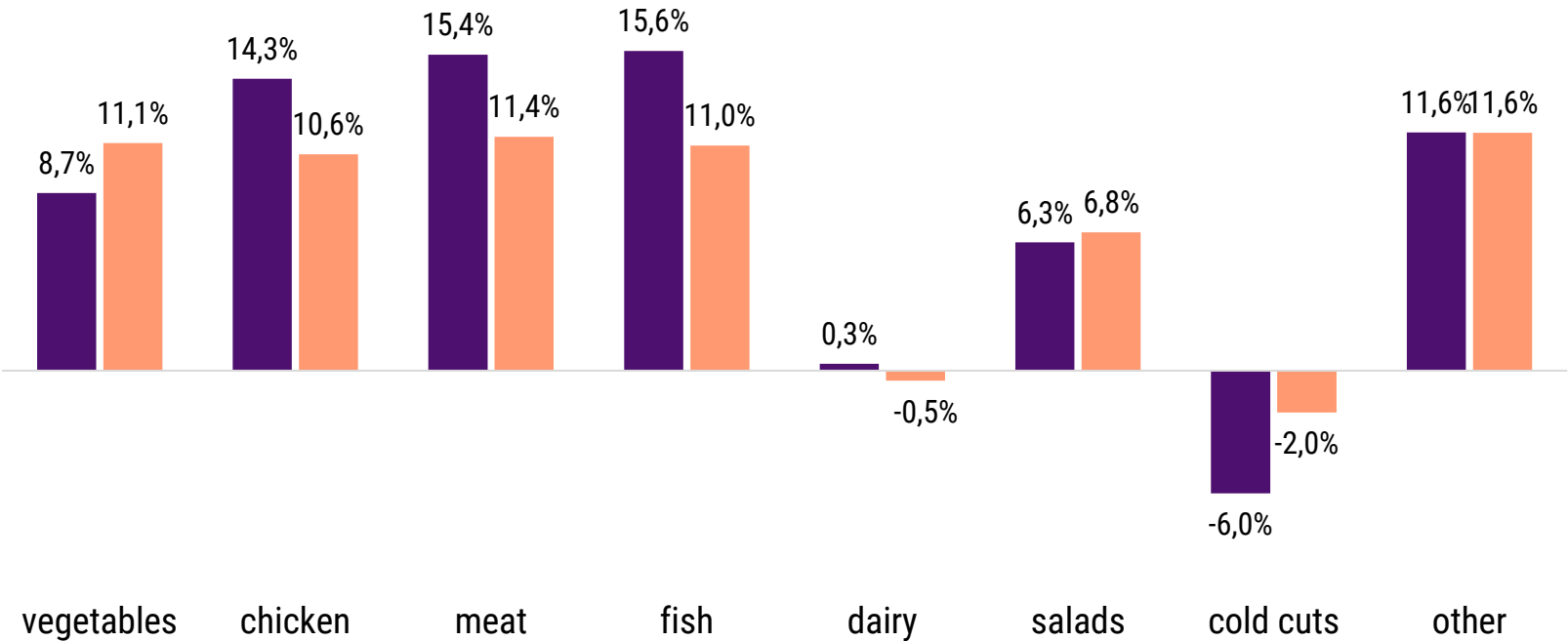
Random
Weight
Categories

Random Weight Value Sales Trend

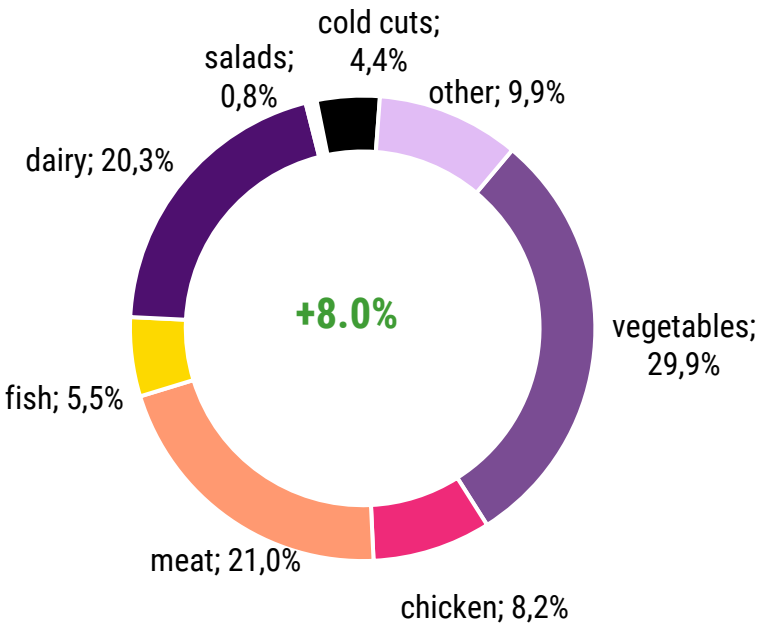


Significant Value Growth during YTD 26 for Random Weight Products, except Dairy and Cold Cuts

■ 2025 ■ YTD 26



YTD 2026 Contribution



Source: Circana Random Weight,, YTD June 26



08

Online Grocery Trends Report

eRetail Audit Panel Turnover

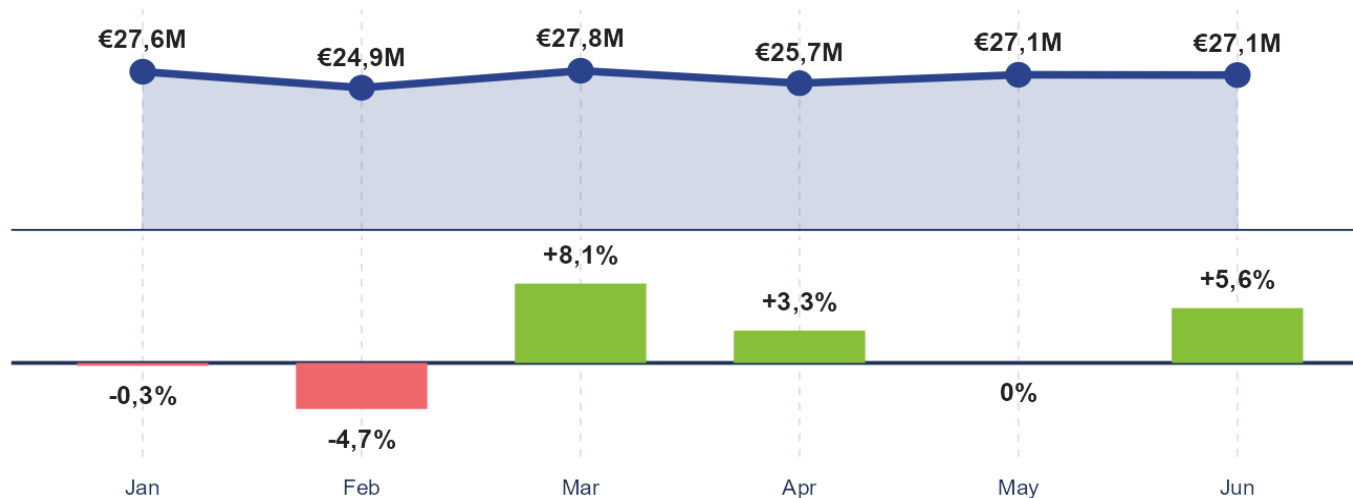
Sales Value incl. VAT

€160M

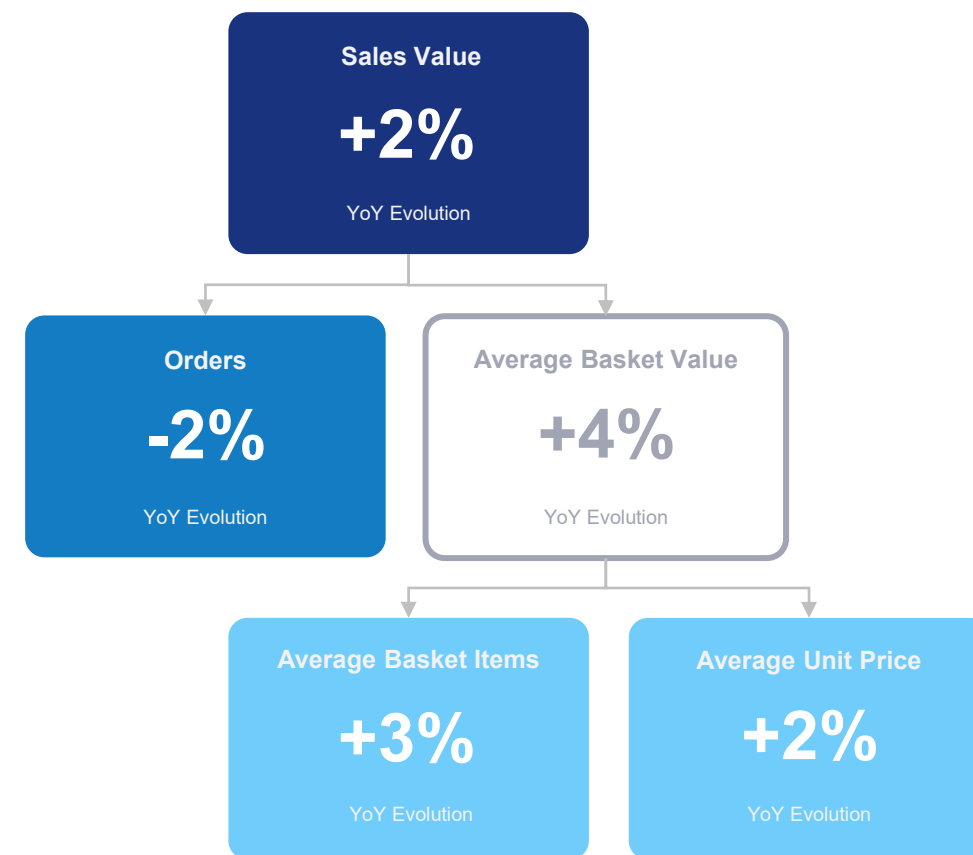
YoY Evolution

+2%

Monthly Sales Value & YoY Evolution



Sales Value Decomposition & Growth Drivers



Mega Categories Overview

1/2

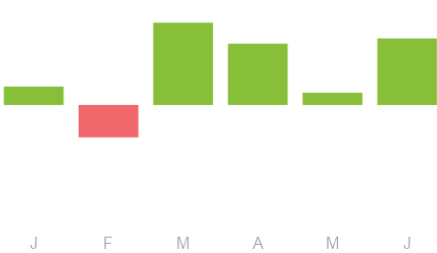
Fresh Food

Sales Value Weight

35% +1pp

YoY Evolution in Sales Value

+4%



Contribution to Growth

+1pp

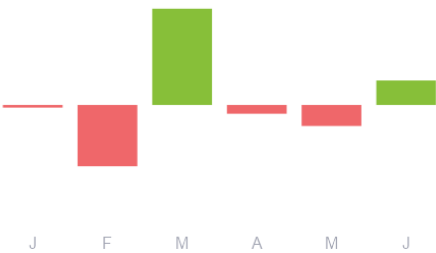
Basic Packaged Food

Sales Value Weight

21% 0pp

YoY Evolution in Sales Value

0%



Contribution to Growth

0pp

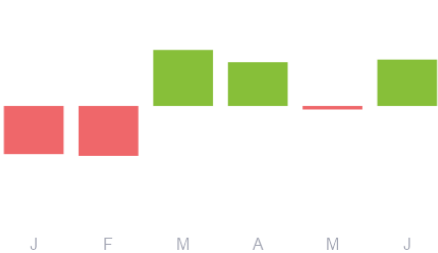
Cleaning Products & Paper for Household Use

Sales Value Weight

14% 0pp

YoY Evolution in Sales Value

+1%



Contribution to Growth

0pp

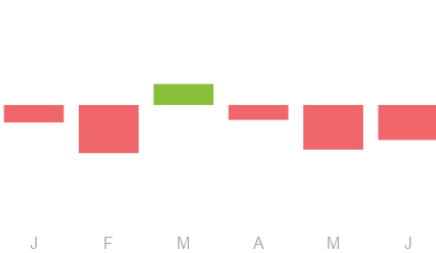
Bottled Beverages, Soft Drinks, Water & Drink Mixes

Sales Value Weight

11% 0pp

YoY Evolution in Sales Value

-3%



Contribution to Growth

0pp

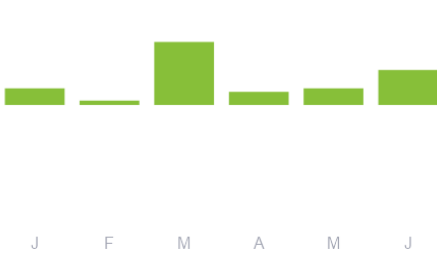
Frozen foods

Sales Value Weight

6% 0pp

YoY Evolution in Sales Value

+3%



Contribution to Growth

0pp

Mega Categories Overview

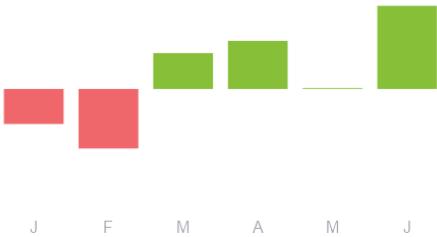
Beauty & Health

Sales Value Weight

6% 0pp

YoY Evolution in Sales Value

+1%



Contribution to Growth

0pp

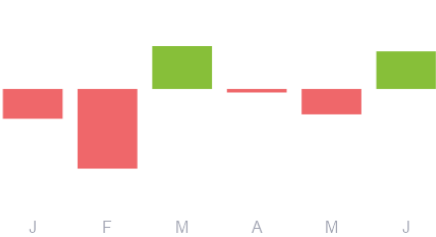
Bakery

Sales Value Weight

4% 0pp

YoY Evolution in Sales Value

-1%



Contribution to Growth

0pp

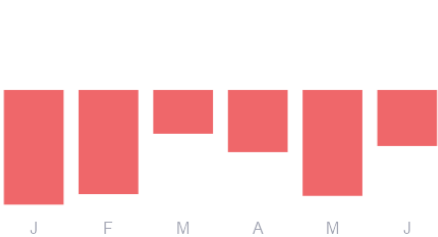
Baby & Kid

Sales Value Weight

3% 0pp

YoY Evolution in Sales Value

-9%



Contribution to Growth

0pp

Pet Supplies

Sales Value Weight

1% 0pp

YoY Evolution in Sales Value

+11%



Contribution to Growth

0pp

Thank you

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