MARKET VIEW YTD July 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

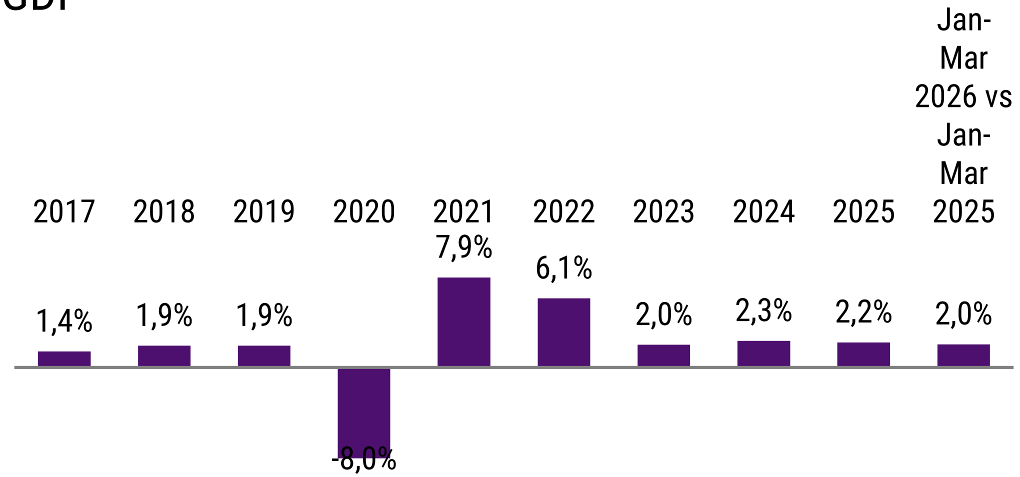
YR 2025 vs YR 2024
YTD July 2026 vs YTD July 2025

01

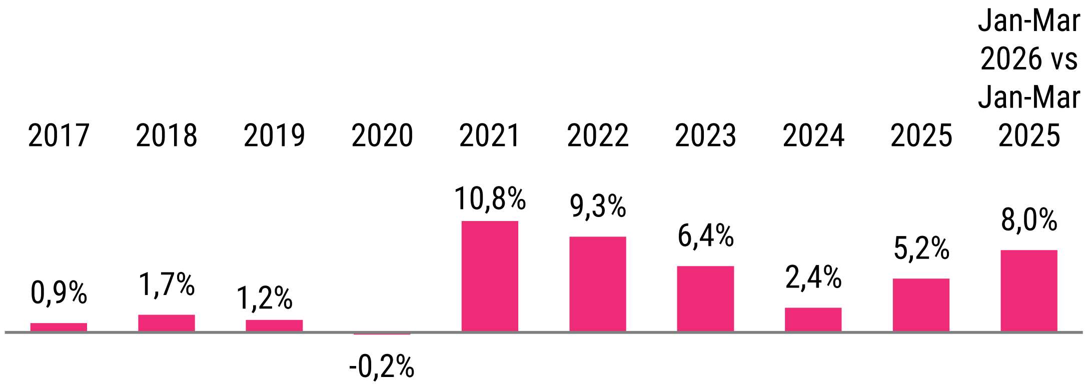
Greek Economy

Greek Economy

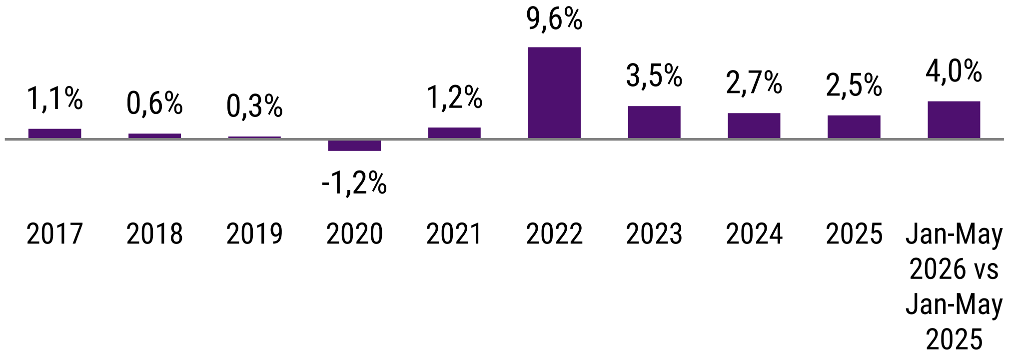
GDP



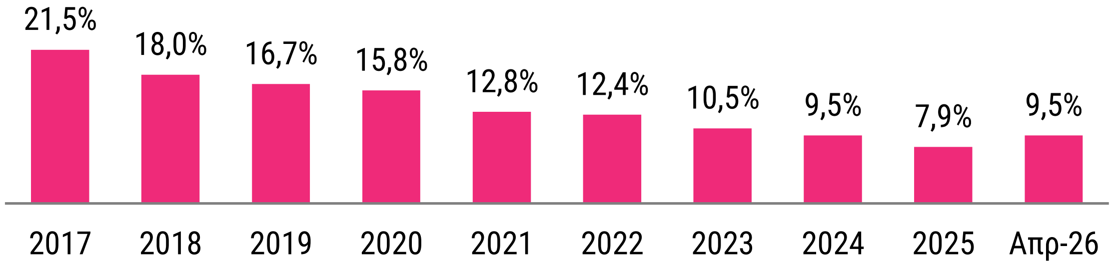
RETAIL TURNOVER INDEX (w.o AUTOMOTIVE FUEL)



INFLATION RATE TREND



UNEMPLOYMENT



Source: ELSTAT (latest available period/provisional data)

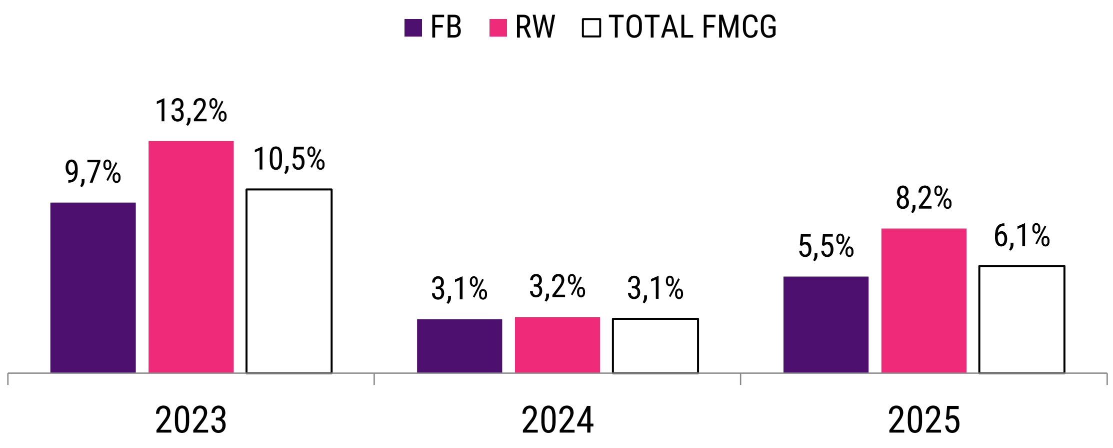
02 Trends for FMCG Market

Fixed Barcodes + Random Weight

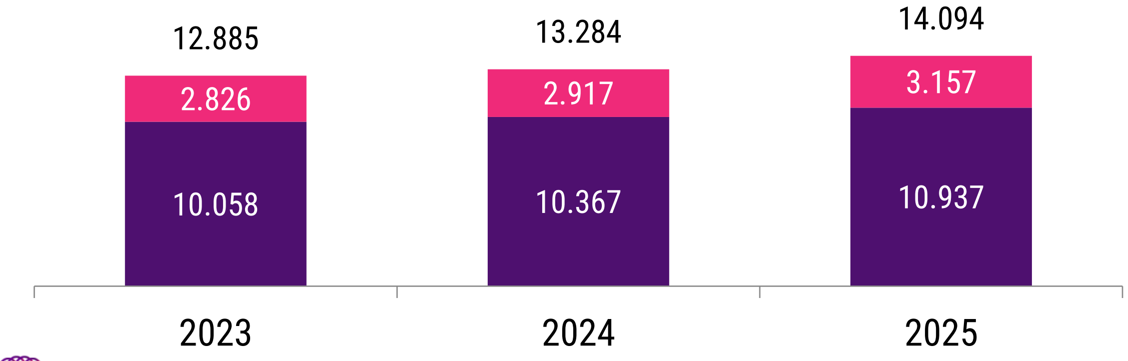
FMCG Value Sales Trend - Year 2025

Incl. Islands

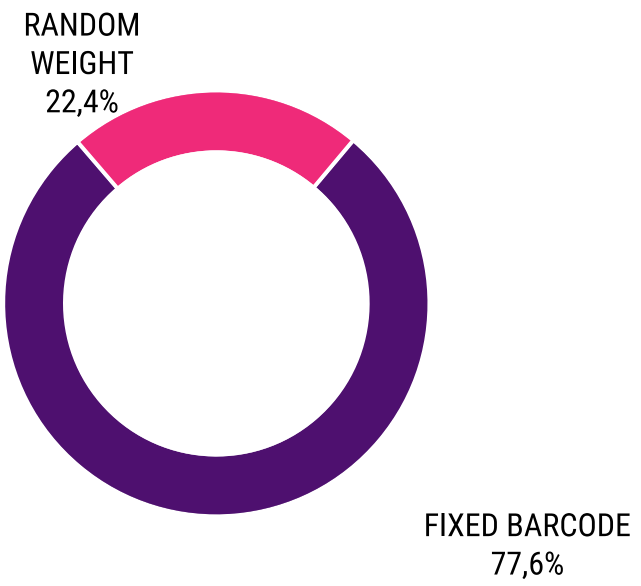
Growth by 6.1% for Total FMCG Market in 2025, coming from both Segments



Value Sales (in Millions)



2025 Value Contribution

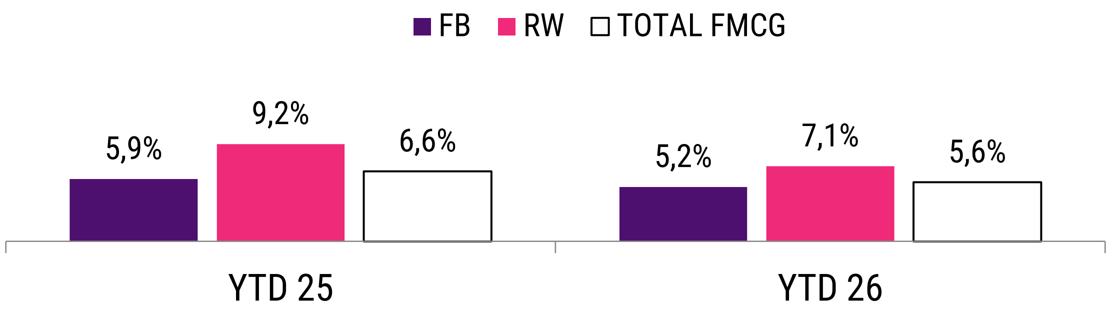


Source: Circana InfoScan, HM/SM + Random Weight, Year 2025

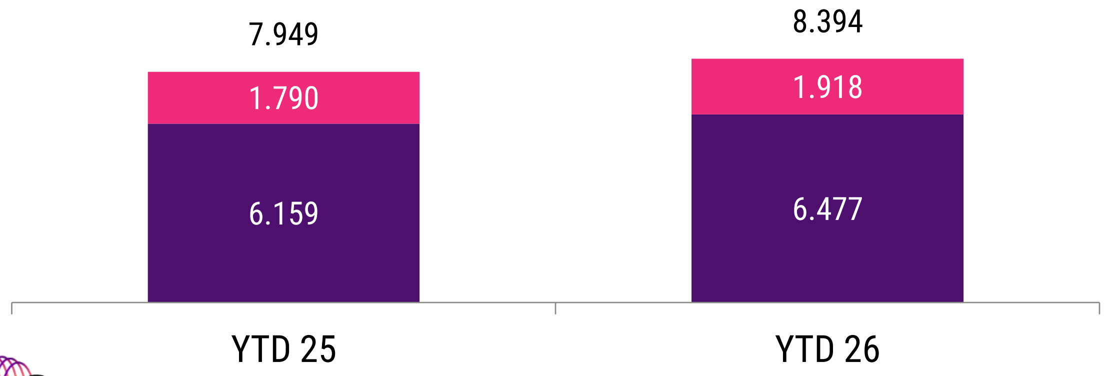
FMCG Value Sales Trend - YTD

Incl. Islands

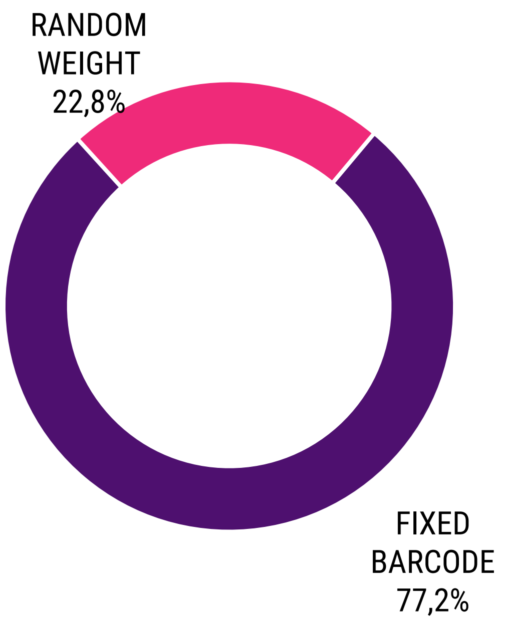
Increase for Total FMCG in YTD 26 (+5.6%) due to both Segments (more intense for RW)



Value Sales (in Millions)



YTD 26 Value Contribution

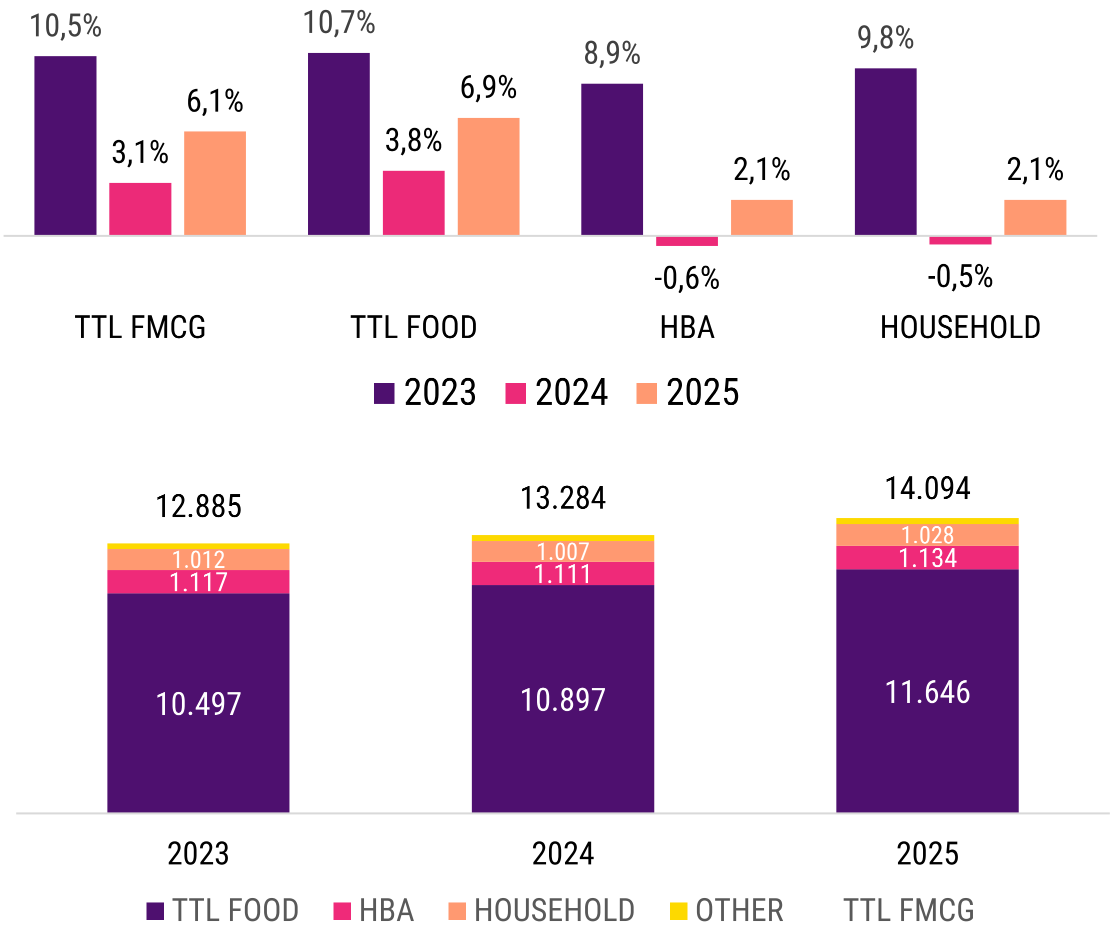


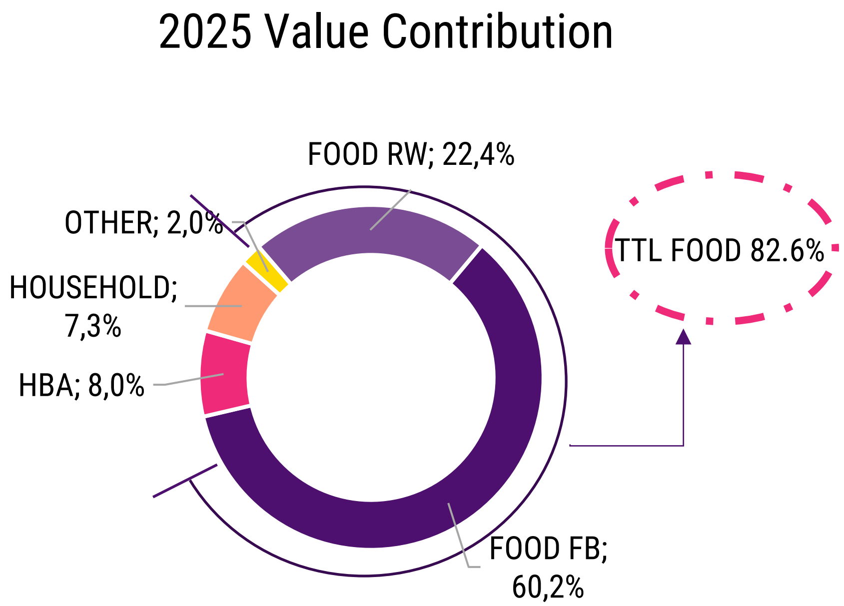
Source: Circana InfoScan, HM/SM + Random Weight, YTD July 26

FMCG Value Sales Trend – Year 2025

Incl. Islands

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



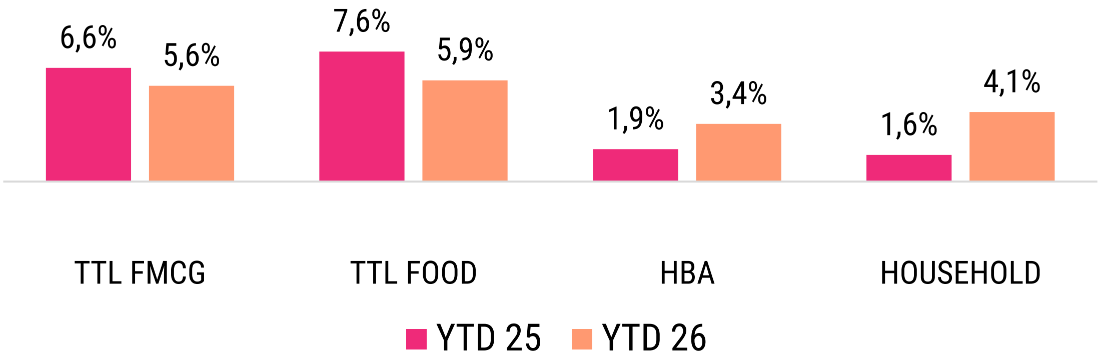


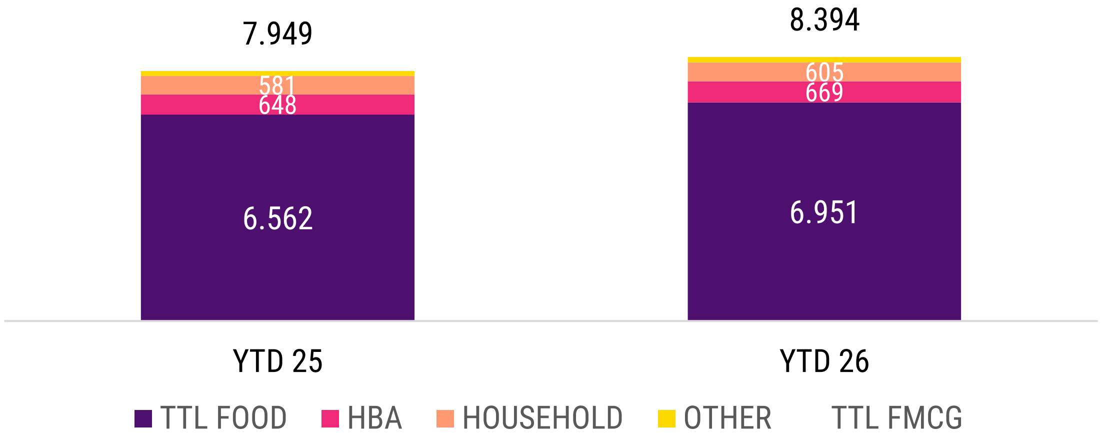
Source: Circana InfoScan, HM/SM + Random Weight, Year 2025

FMCG Value Sales Trend - YTD

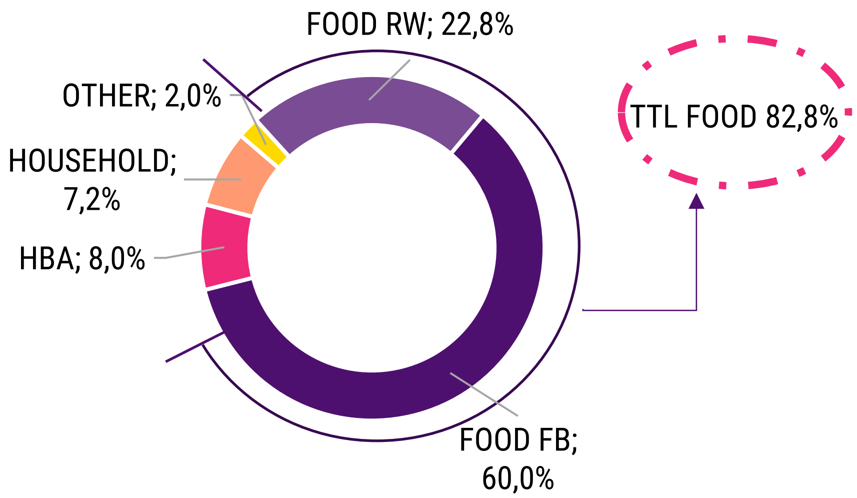
Incl. Islands

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





YTD 26 Value Contribution



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

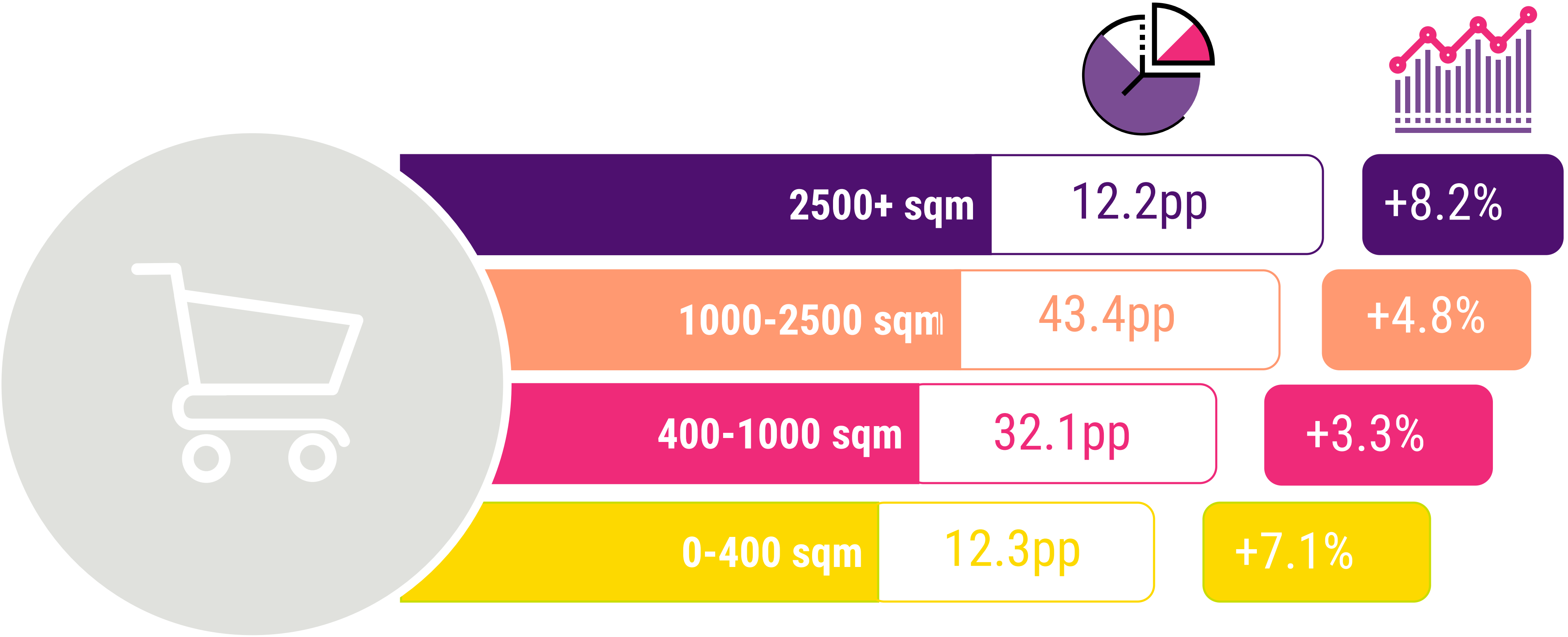
03

Trends for FMCG Market

Fixed Barcodes

FMCG Value Sales Trends per Store Type YTD

All Shop Types achieve growth during YTD 26, more intense for Hyper and Small

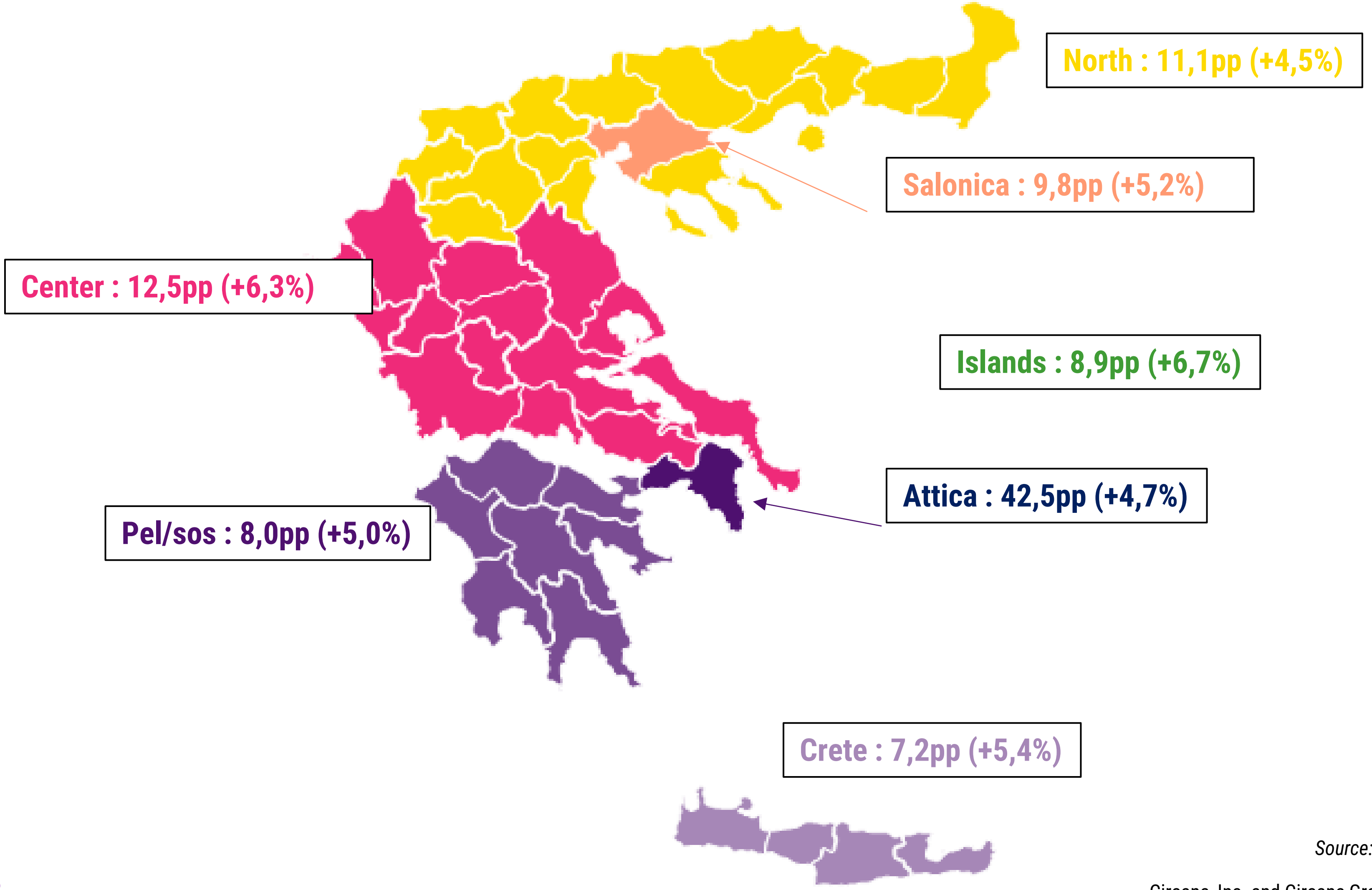


Excl. Islands

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

FMCG Value Sales Trends per Geo YTD

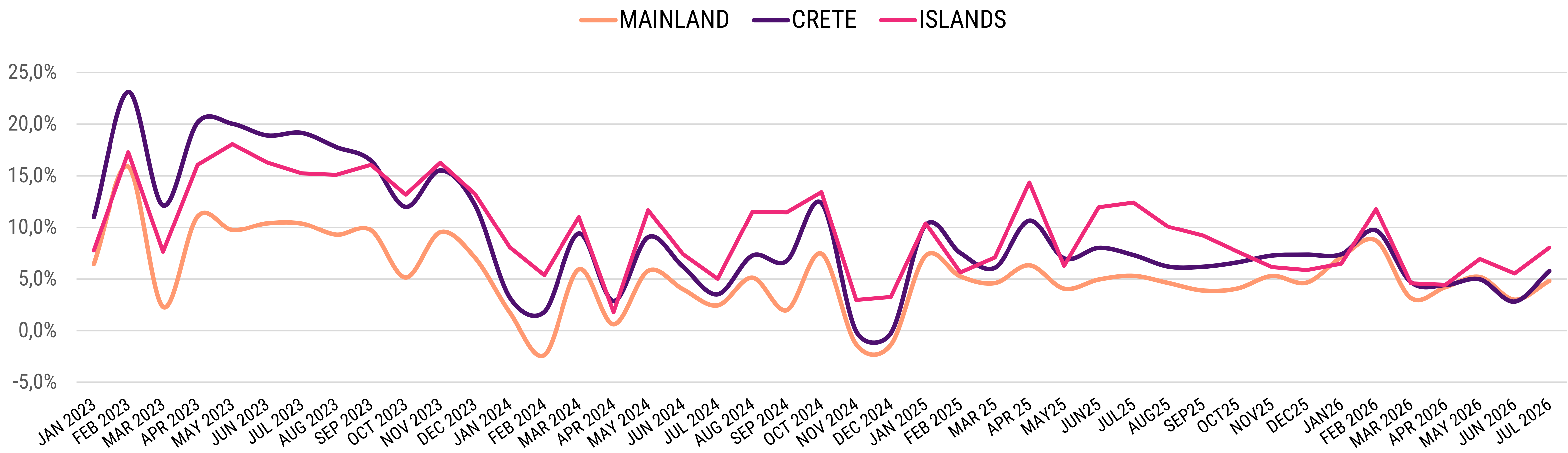
Incl. Islands



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

Geos Special Analysis

FMCG Monthly Value Growth



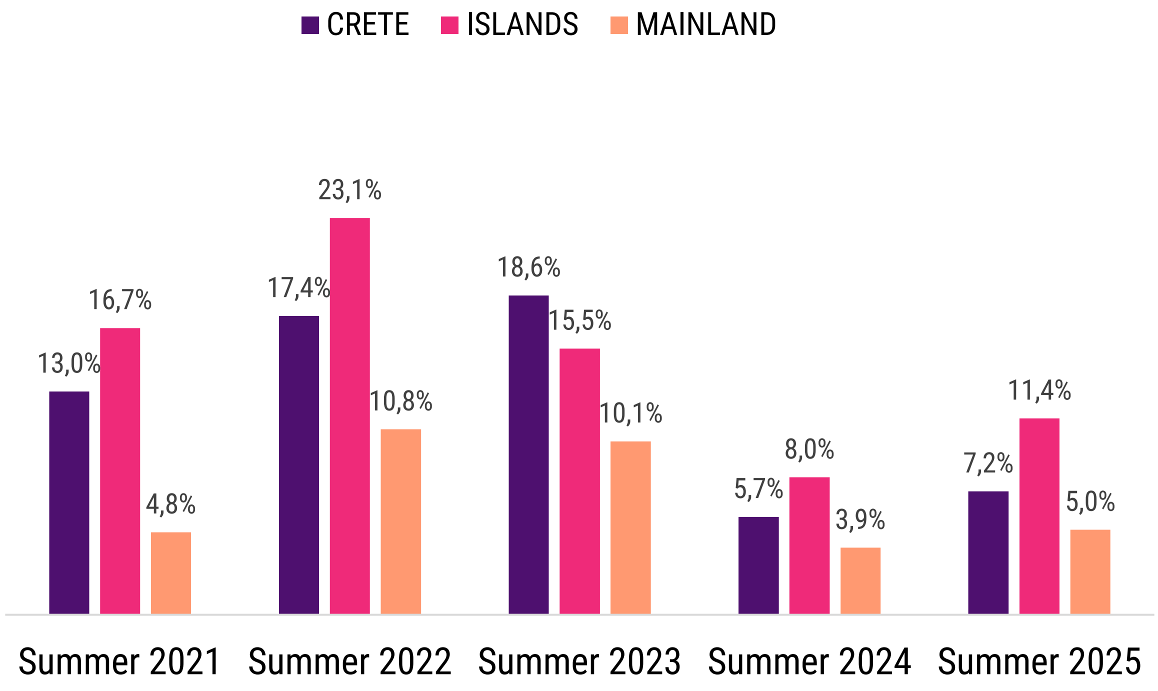
Circana.

FMCG Value Growth during Summers

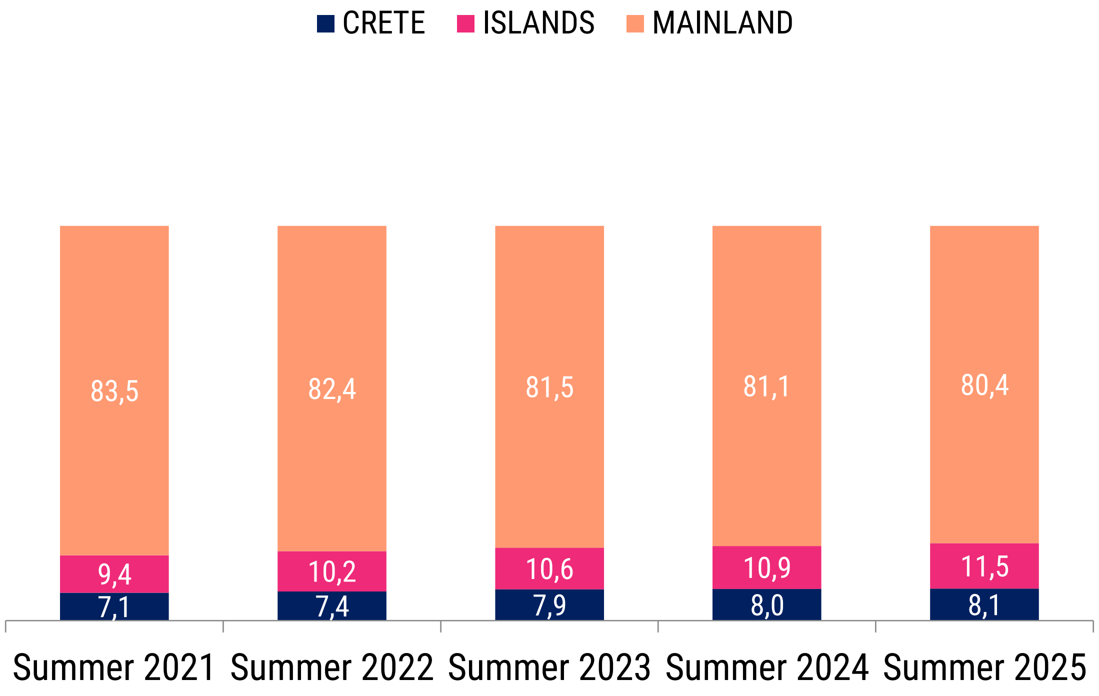
Incl. Islands

Intense growth during Summers for Islands and Crete

Value Growth



Value Contribution

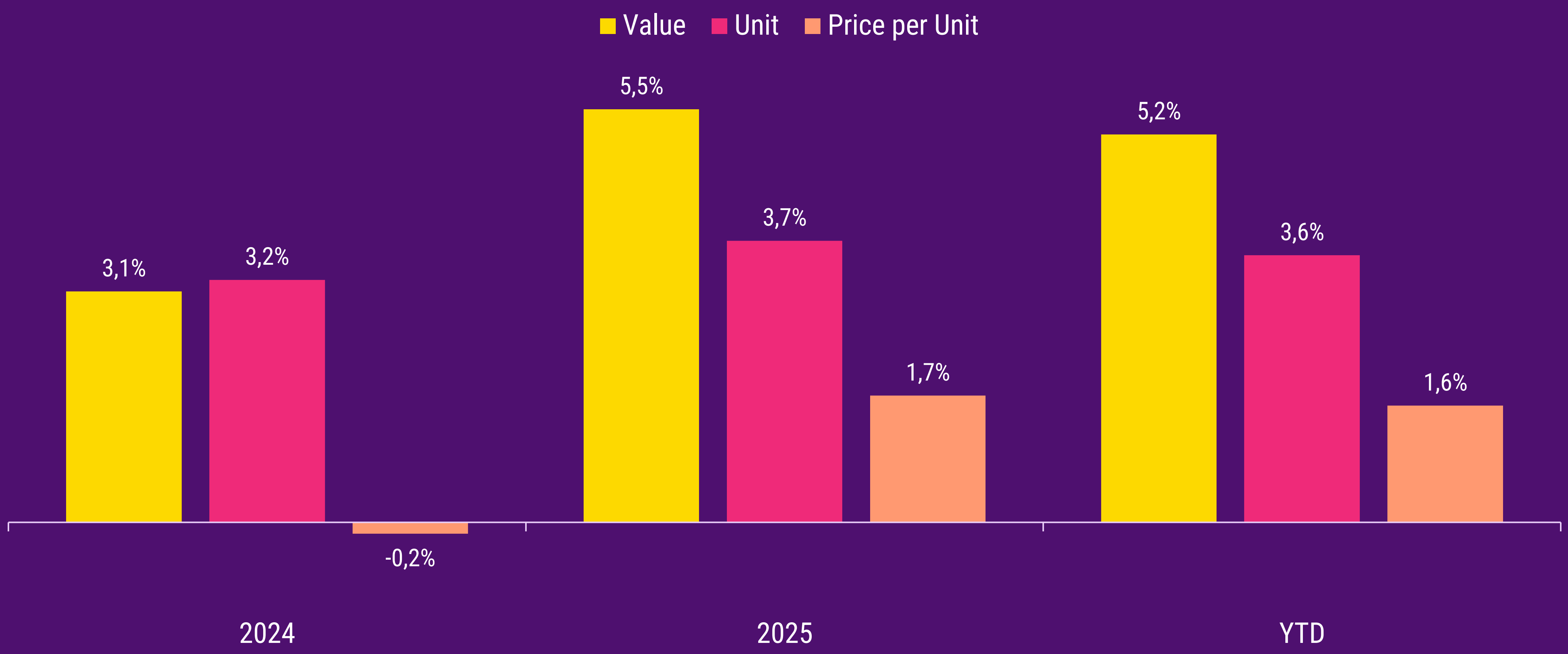


Price Analysis

FMCG Price Trends

Incl. Islands

More intense increase in Value during YTD 26



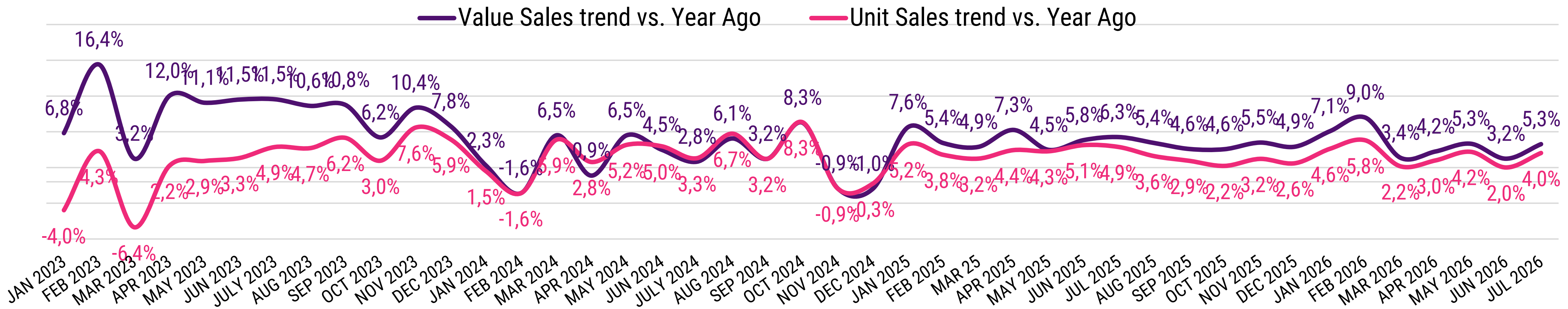
Source: Circana InfoScan, HM/SM , YTD July 26

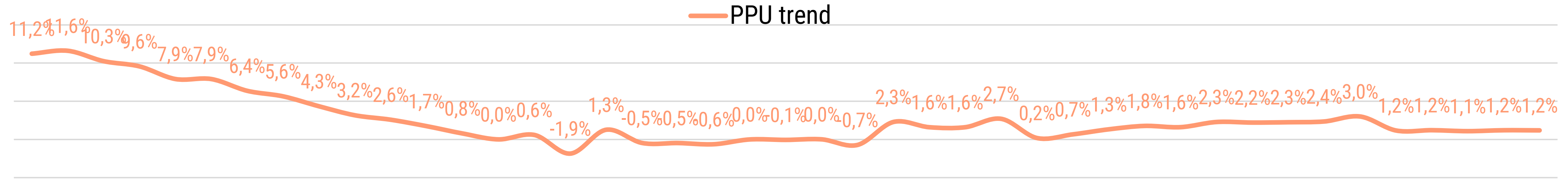
FMCG Value and Unit Monthly Trends

Incl. Islands

Lower gap between value and unit growth during the last months

YR 2024: +3.1%
YR 2025: +5.5%
YTD 2026: +5.2%





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

04 Giga Categories Evolution

Giga Categories Value Sales Trend

Incl. Islands

Food manages the highest increase in YTD 26

	Food	Health & Beauty	Household
YTD 2026	+5.5%	+3.4%	+4.1%
2025	+6.4%	+2.1%	+2.1%

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

Giga Categories Unit Sales Trend

Incl. Islands

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

	Food	Health & Beauty	Household
YTD 2026	+3.4%	+3.5%	+3.2%
2025	+3.8%	+3.3%	+2.6%

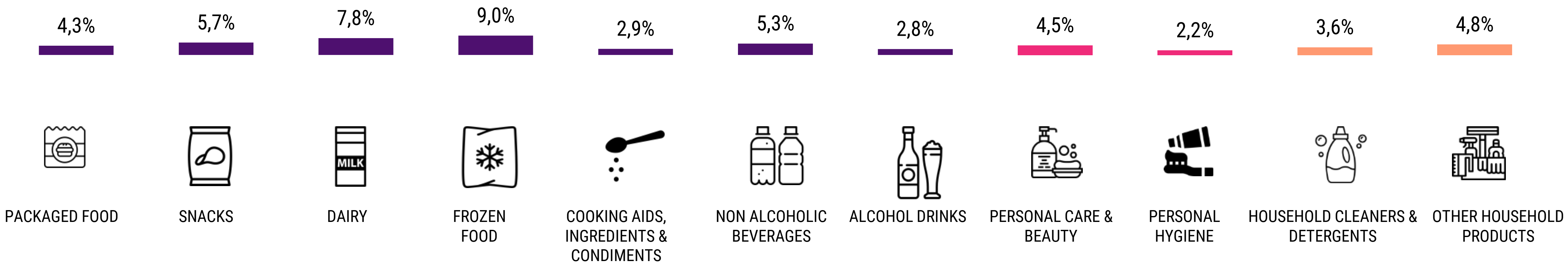
Source: Circana InfoScan, HM/SM , YTD July 26

Categories Value Sales Trend YTD

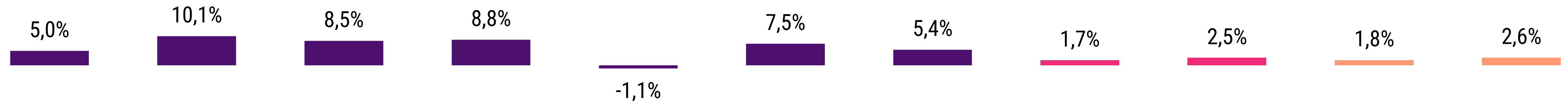
Incl. Islands

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

Value Sales Trend YTD 2026



Value Sales Trend 2025



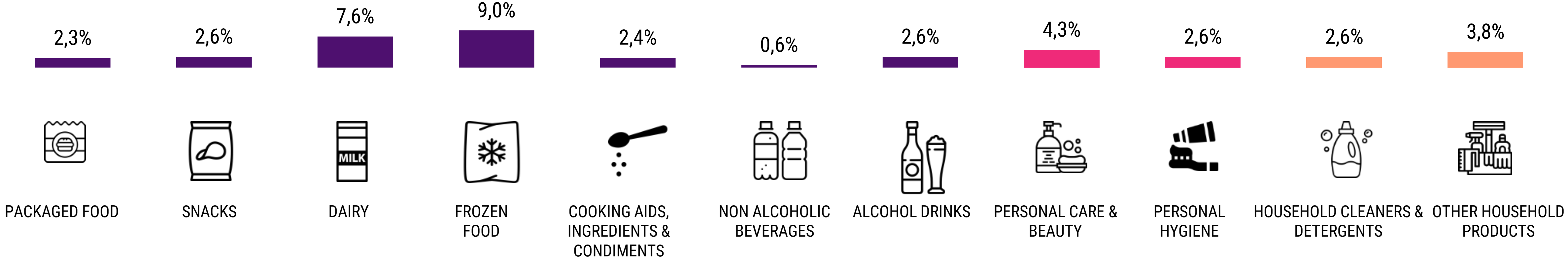
Source: Circana InfoScan, HM/SM , YTD July 26

FMCG Unit Sales Trend YTD

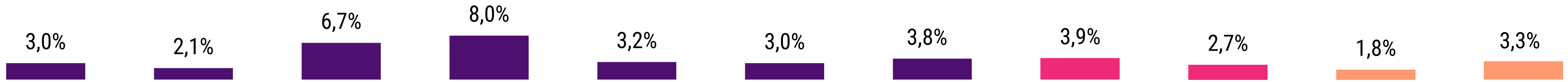
Incl. Islands

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

Unit Sales Trend YTD 2026



Unit Sales Trend 2025



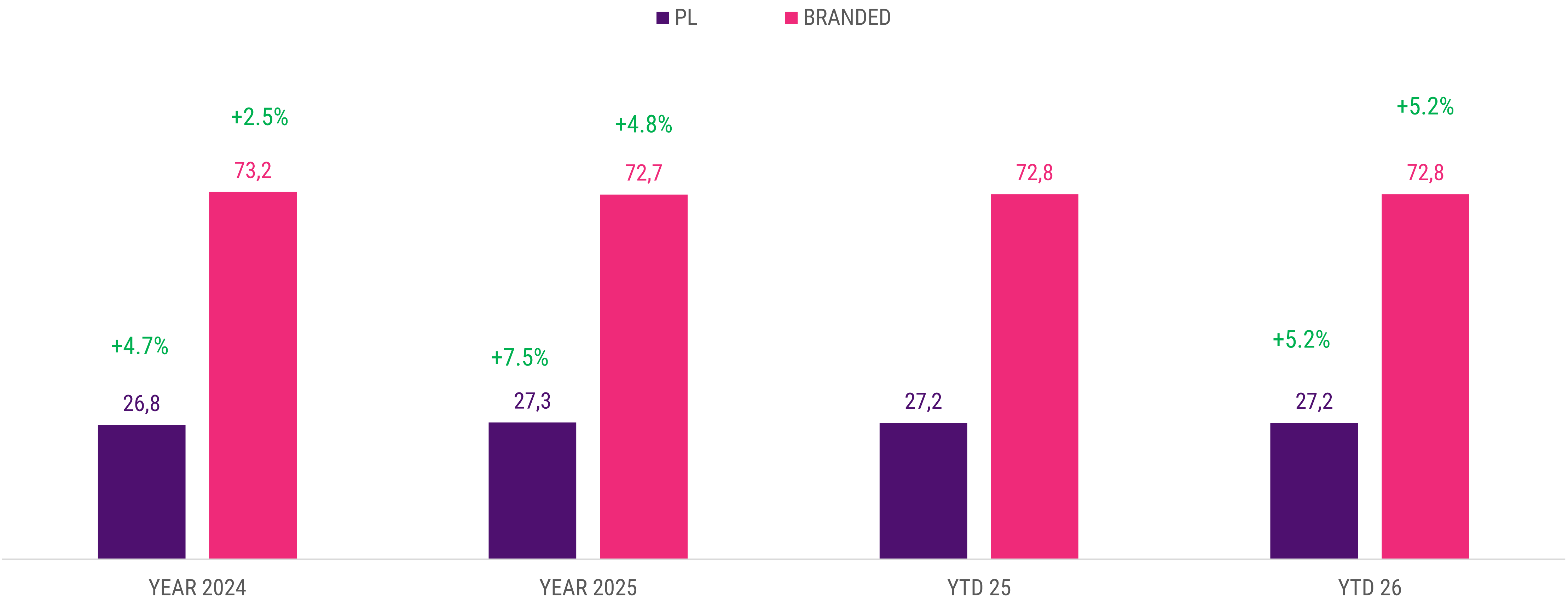
Source: Circana InfoScan, HM/SM , YTD July 26

05 Evolution of Private Labels

PL and Branded Value Shares and Trends

Incl. Islands

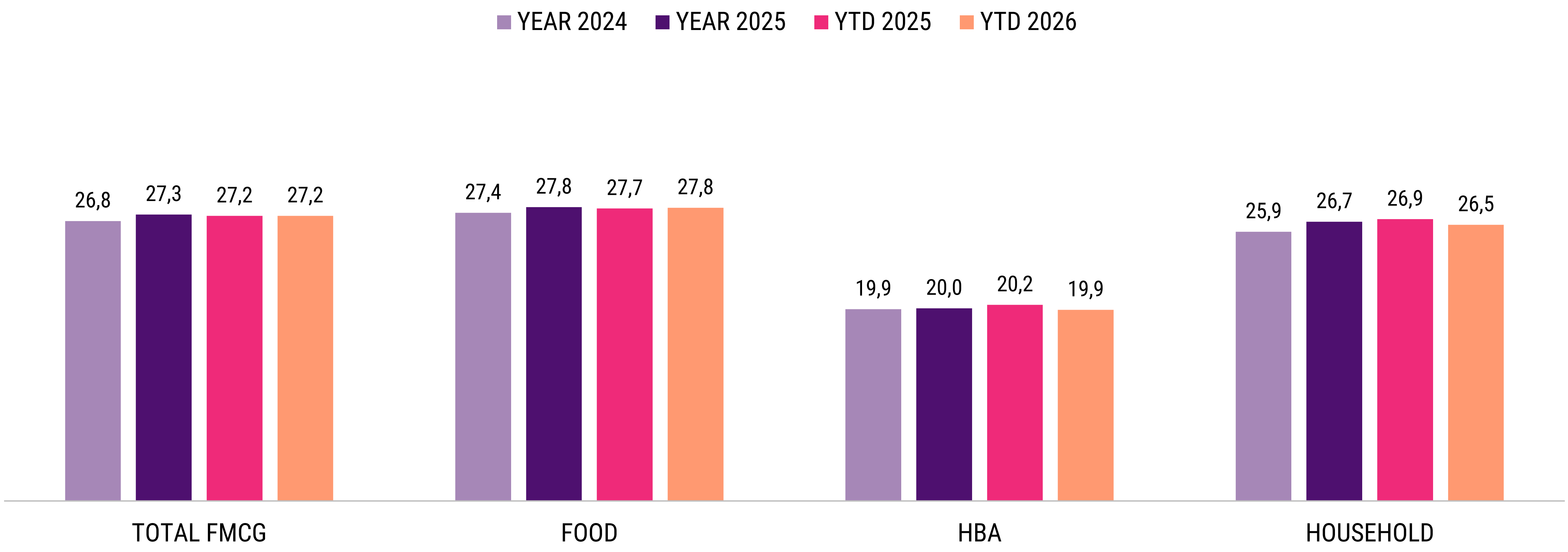
After a long time, Branded manage same growth rate with PL



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

PL Value Share per Giga Category

! Incl. Islands



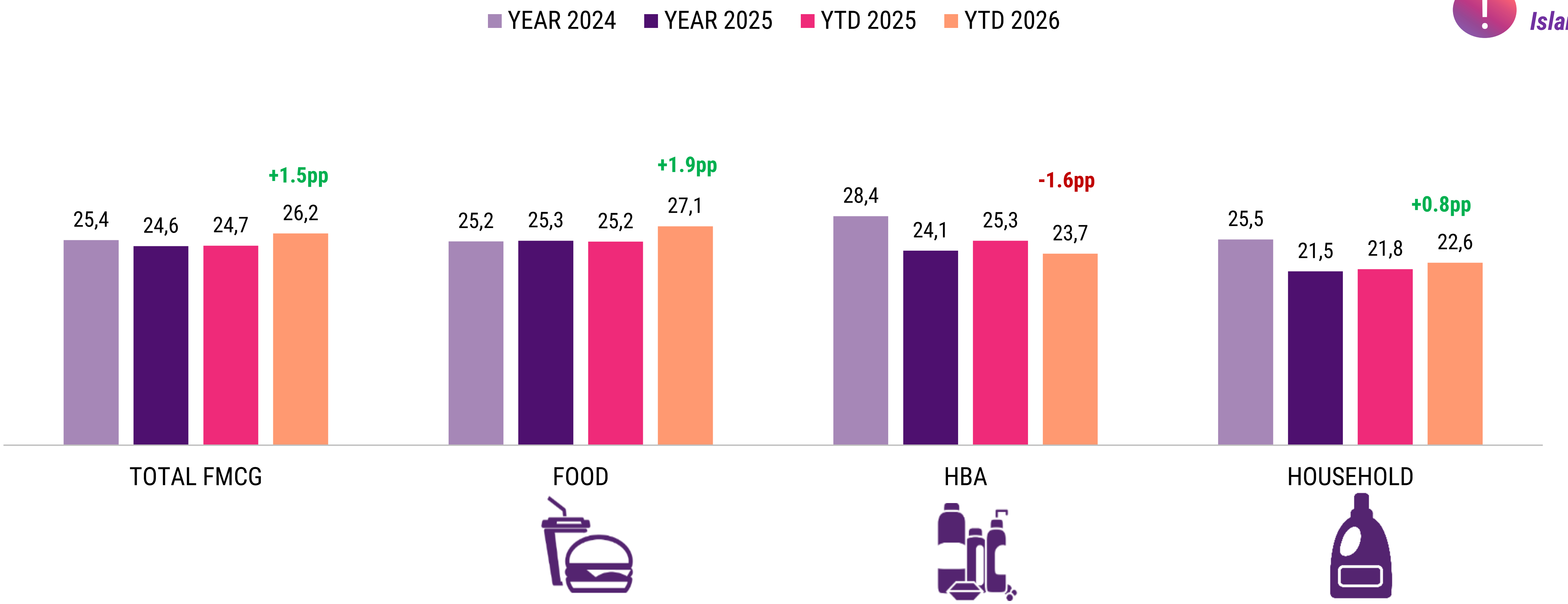
Source: Circana InfoScan, HM/SM, YTD July 26

06 Price Trends & Promo Pressure

%Value Sales due to Temporary Price Reduction

Increased promo intensity for Food in YTD 26

Incl. Islands

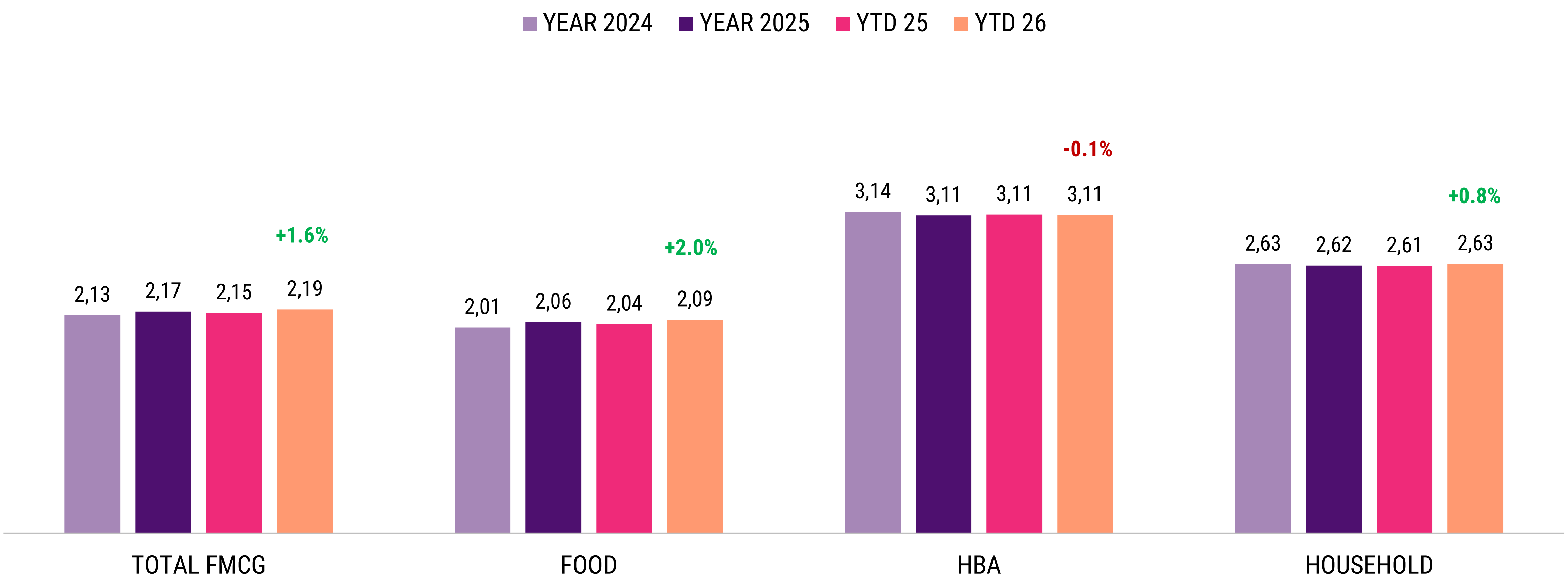


Source: Circana InfoScan, HM/SM , YTD July 26

Price per Unit per Giga Category

Incl. Islands

Price increase for Food influences total FMCG in YTD 26



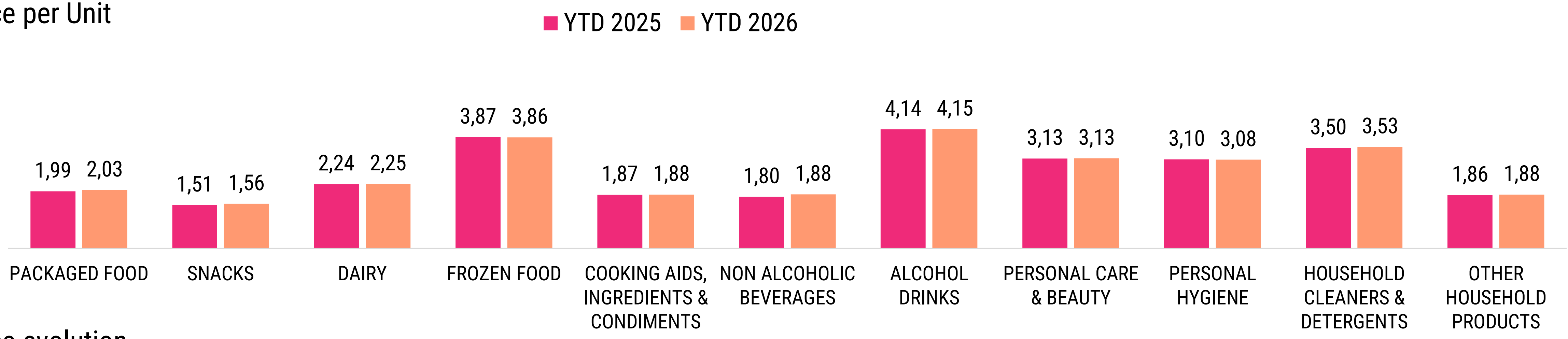
Source: Circana InfoScan, HM/SM , YTD July 26

Price per Unit per Category

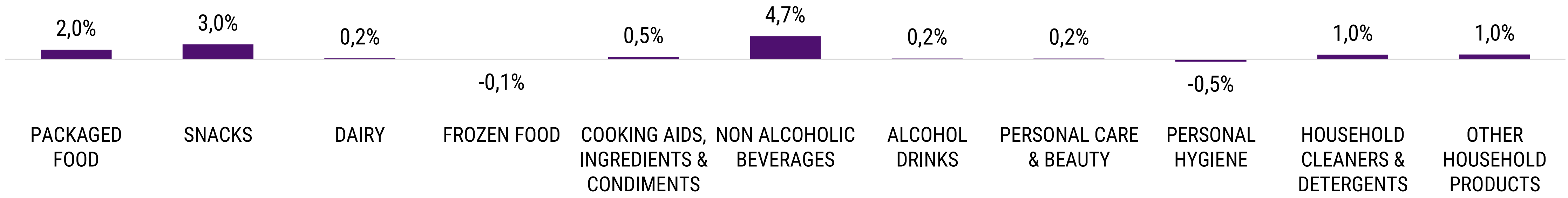
Incl. Islands

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

Price per Unit



Price evolution



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

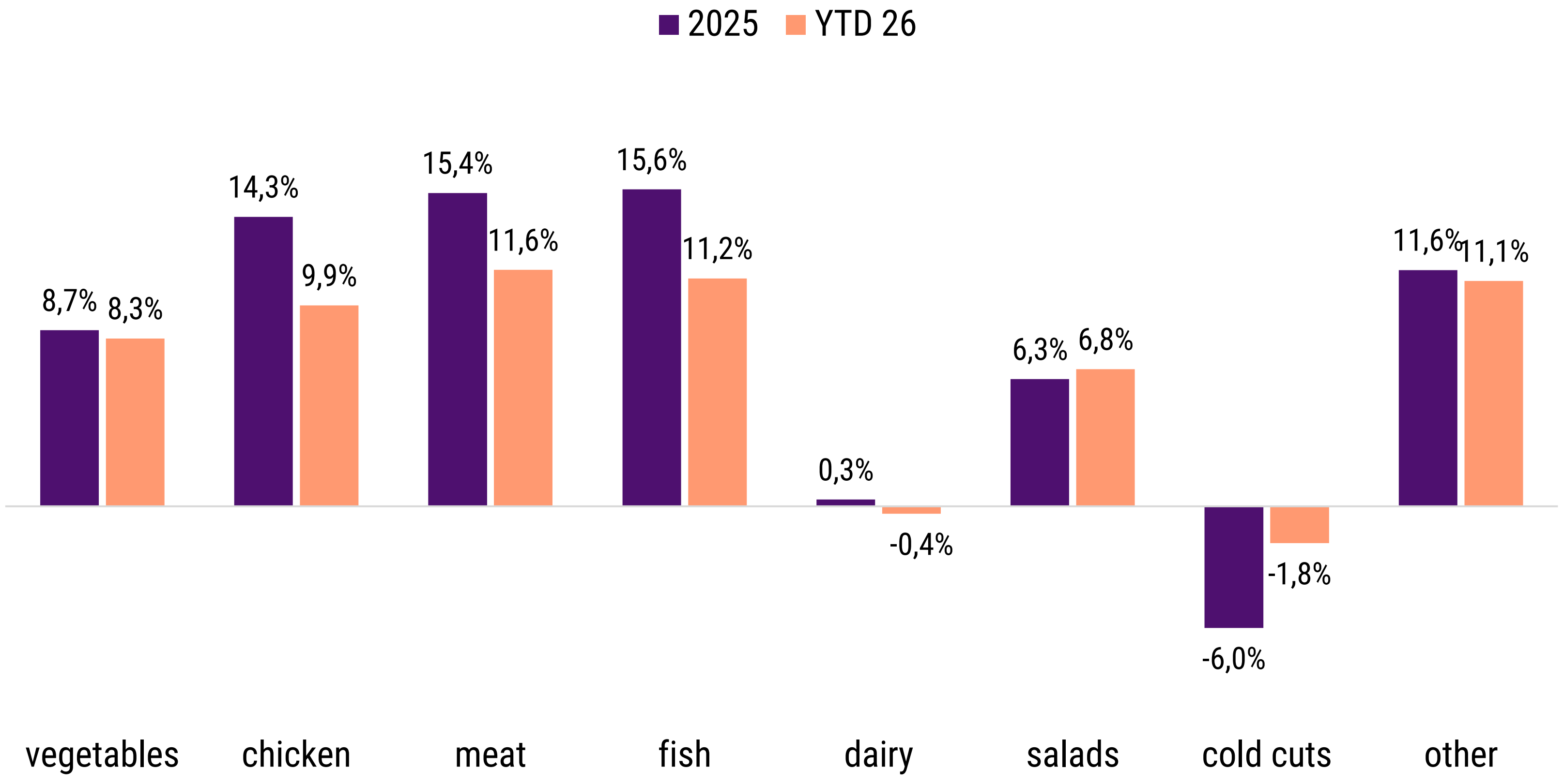
07

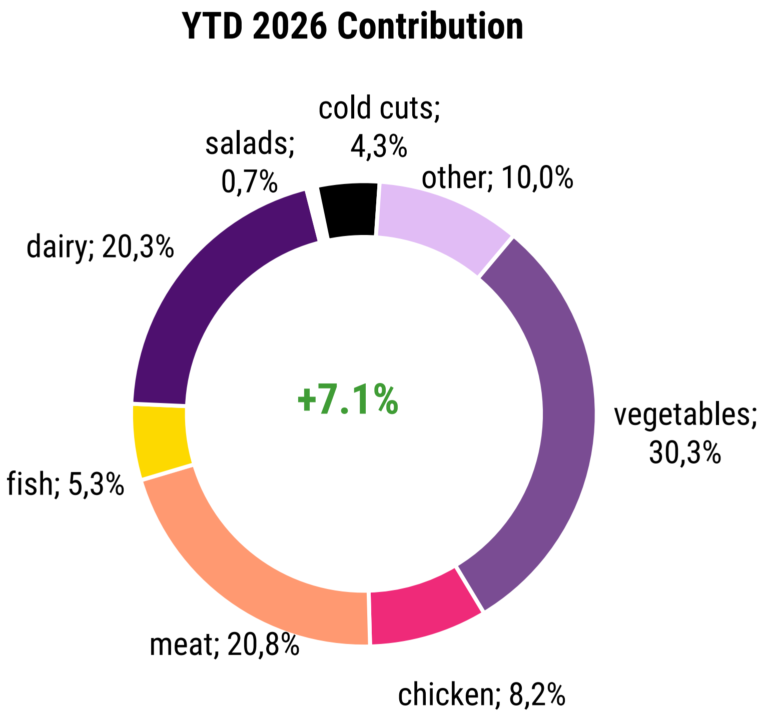
Random Weight Categories

Random Weight Value Sales Trend

Incl. Islands

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





Source: Circana Random Weight,, YTD July 26

08 Online Grocery Trends Report

eRetail Audit Panel Turnover

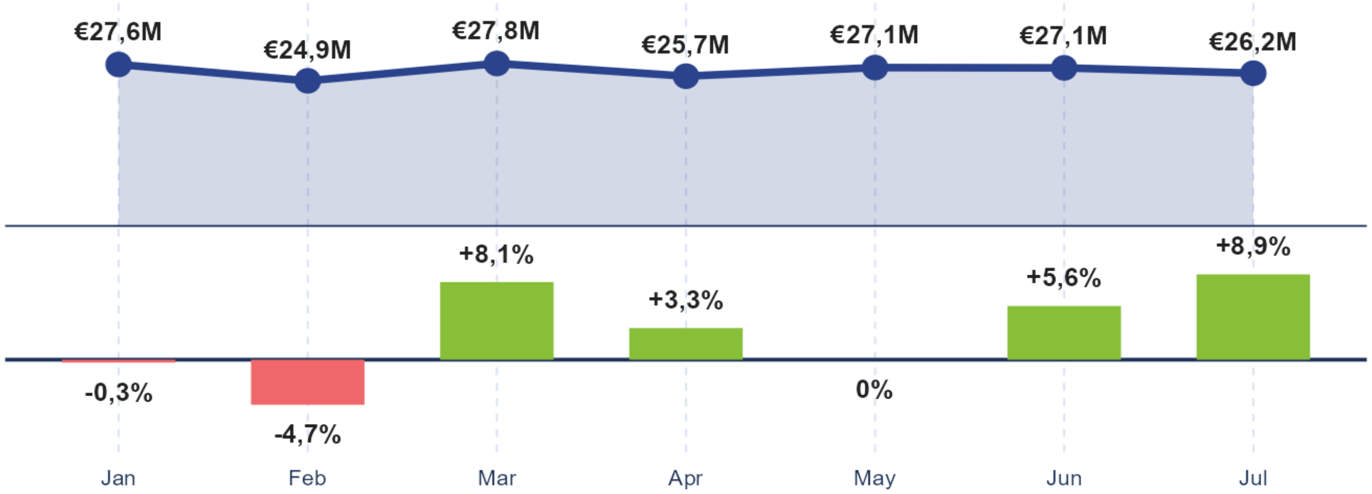
Sales Value incl. VAT

€186M

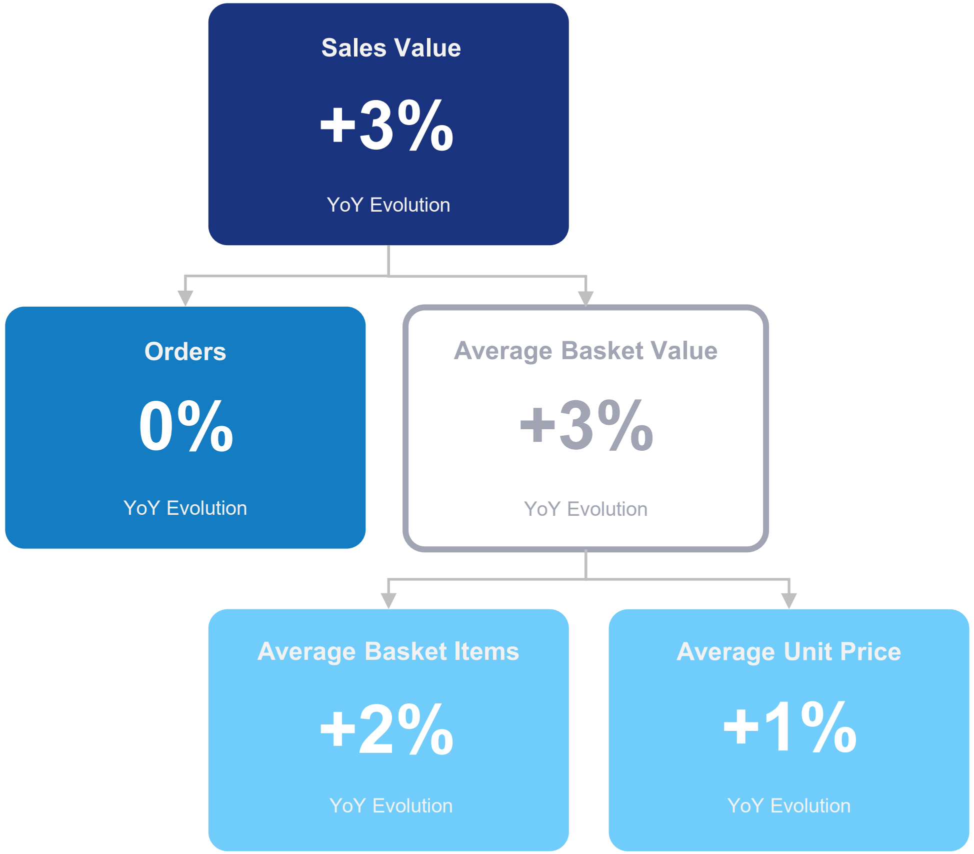
YoY Evolution

+3%

Monthly Sales Value & YoY Evolution



Sales Value Decomposition & Growth Drivers



Sales Value includes VAT. Based on data from eRetail Audit Panel.

Mega Categories Overview

1/2

Fresh Food

Sales Value Weight

35% +1pp

YoY Evolution in Sales Value

+5%

Contribution to Growth

+2pp

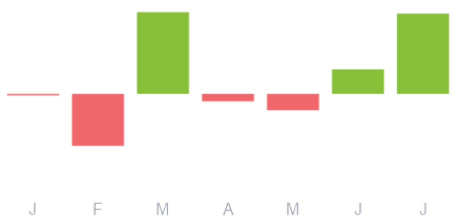
Basic Packaged Food

Sales Value Weight

21% 0pp

YoY Evolution in Sales Value

+2%



Contribution to Growth

0pp

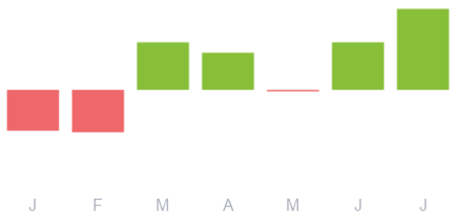
Cleaning Products & Paper for Household Use

Sales Value Weight

14% 0pp

YoY Evolution in Sales Value

+2%



Contribution to Growth

0pp

Bottled Beverages, Soft Drinks, Water & Drink Mixes

Sales Value Weight

11% -1pp

YoY Evolution in Sales Value

-2%

Contribution to Growth

0pp

Beauty & Health

Sales Value Weight

6% 0pp

YoY Evolution in Sales Value

+10%

Contribution to Growth

+1pp

Based on data from eRetail Audit Panel.

Mega Categories Overview

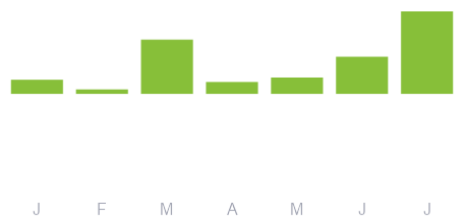
Frozen foods

Sales Value Weight

6% 0pp

YoY Evolution in Sales Value

+4%



Contribution to Growth

0pp

Bakery

Sales Value Weight

3% 0pp

YoY Evolution in Sales Value

0%

Contribution to Growth

0pp

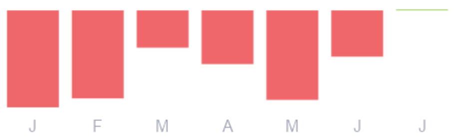
Baby & Kid

Sales Value Weight

3% 0pp

YoY Evolution in Sales Value

-8%



Contribution to Growth

0pp

Pet Supplies

Sales Value Weight

1% 0pp

YoY Evolution in Sales Value

+12%

Contribution to Growth

0pp

Based on data from eRetail Audit Panel.

Thank you

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