



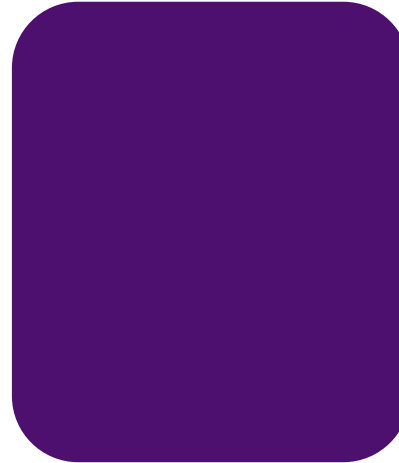
Greek Tourism 2026

Inbound tourism: arrivals, receipts and
source markets



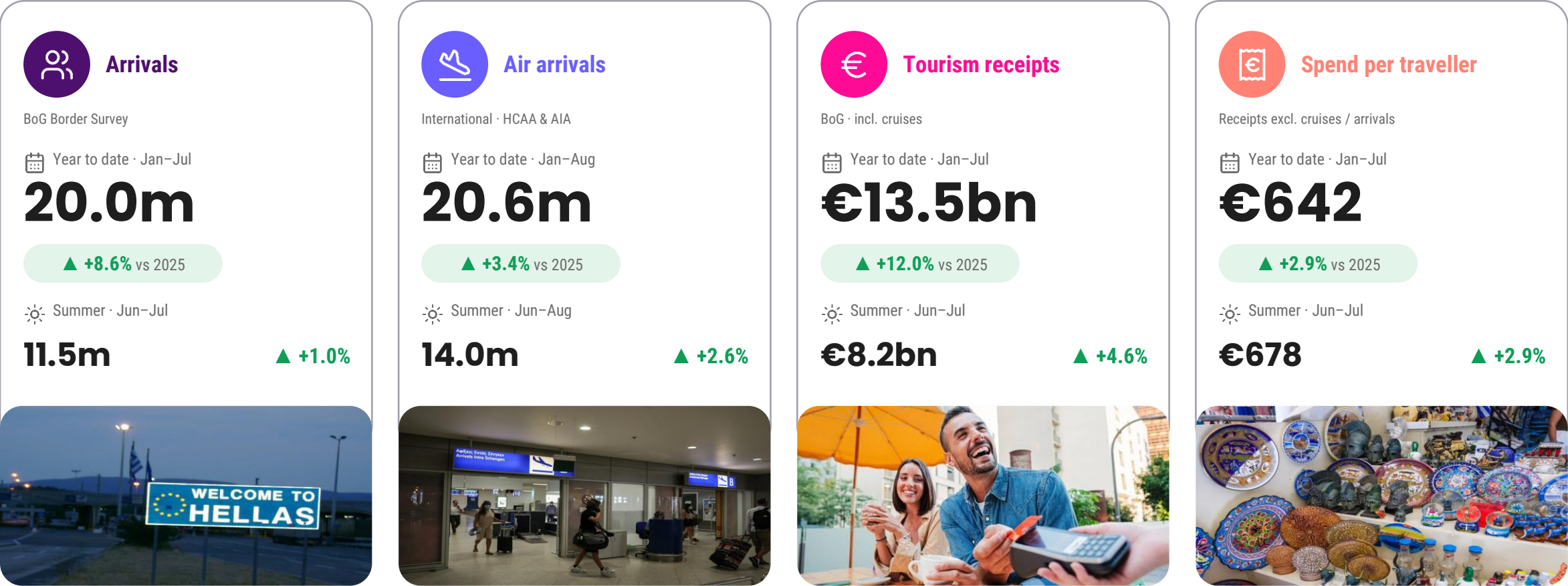
Jan–Aug 2026 vs 2025 • Source: INSETE Intelligence, Bank of Greece, Athens
International Airport, Hellenic Civic Aviation Authority

September 2026



More visitors, even more revenue

Inbound tourism in Greece, 2026: key indicators vs 2025



Source: INSETI Intelligence, Statistical Bulletin No 115 (Sep 2026) · Data: HCAA, AIA, Bank of Greece (provisional)

Top 5 source markets

YTD 2026 vs 2025

	 Arrivals	 Receipts	 € / traveller
 United Kingdom	2.58m ▲ +12.3%	€2.09bn ▲ +23.3%	€811 ▲ +9.8%
 Germany	3.03m ▲ +7.7%	€1.98bn ▼ -0.7%	€654 ▼ -7.8%
 USA	830k ▼ -8.2%	€1.06bn ▲ +7.9%	€1,281 ▲ +17.5%
 Italy	1.27m ▲ +24.6%	€828m ▲ +31.6%	€650 ▲ +5.7%
 France	923k ▼ -5.1%	€624m ▼ -16.8%	€676 ▼ -12.4%



Fewer, but bigger spenders

€1,281 per US traveller

Arrivals from the US fell -8.2%, while spend per traveller rose +17.5%.

Source: INSETE Intelligence, Statistical Bulletin No 115 · BoG Border Survey (provisional). Spend per traveller: receipts / arrivals.

Top 5 source markets

Summer · June–July 2026 vs 2025

	 Arrivals	 Receipts	 € / traveller
 United Kingdom	1.62m ▲ +1.8%	€1.36bn ▲ +12.1%	€838 ▲ +10.1%
 Germany	1.80m ▲ +4.1%	€1.22bn ▼ -1.3%	€677 ▼ -5.2%
 Italy	917k ▲ +29.3%	€606m ▲ +32.9%	€661 ▲ +2.8%
 USA	376k ▼ -14.7%	€524m ▼ -1.9%	€1,394 ▲ +15.1%
 France	534k ▼ -15.2%	€339m ▼ -31.9%	€635 ▼ -19.7%

Source: INSETE Intelligence, Statistical Bulletin No 115 · BoG Border Survey (provisional). Spend per traveller: receipts / arrivals.



The fastest-growing market

+29.3% arrivals from Italy

Receipts from Italian travellers also rose +32.9% over June–July.

Value over volume

Summer (June–July 2026): stable volume, more revenue



+1.0%

Arrivals

11.5m travellers



+4.6%

Receipts

€8.2bn



+2.9%

Spend per traveller

€678, up from €659

Volume is broadly flat; growth is coming from **value**.

Source: INSETTE Intelligence, Bulletin No 115 · BoG, HCAA, AIA (provisional). Spend per traveller excl. cruises. Athens: foreign residents only.

+4.9%

International arrivals at
regional airports (Jun–
Jul)



–4.9%

International arrivals in
Athens (Jun–Jul)

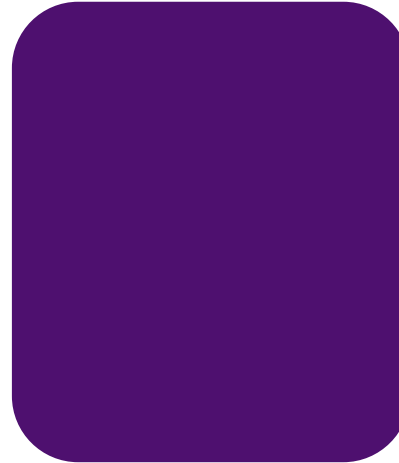




Summer Categories

How Summer shapes demand in seasonal categories

☀️ YTD and Summer 2026 vs last year



Total Market



Total supermarket FMCG · YTD and Summer 2026 vs LY

Value · YTD

€7.82bn

▲ +5.3% vs LY

Value · Summer

€3.18bn

▲ +4.2% vs LY

Units · YTD

3.55bn

▲ +3.6% vs LY

Units · Summer

1.43bn

▲ +3.0% vs LY

Supermarket sales keep growing through the summer months in Mainland Greece and Islands, at a **slightly slower pace**.

41% of YTD value sales happen in summer



Most seasonal:

Suncare 86%

Insecticides 78%

Ice cream 76%

Non-Alcoholic Beverages

Steady growth, led by sport drinks and RTD coffee



Value · YTD

€924.9m

▲ +5.3% vs LY

Value · Summer

€405.3m

▲ +2.0% vs LY

Units · YTD

497.3m

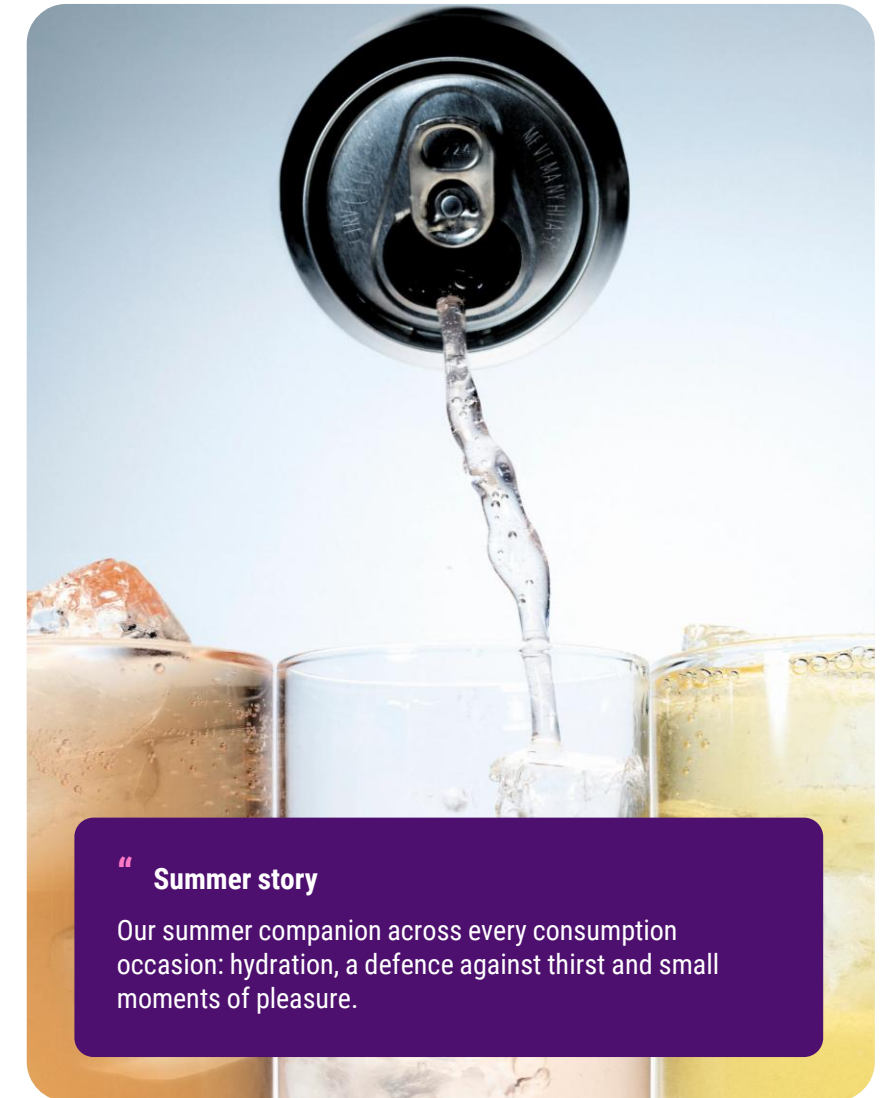
▲ +0.9% vs LY

Units · Summer

232.0m

▼ -0.9% vs LY

Seasonal category	Value YTD		Value Summer		Units YTD	Units Summer	☀ Summer share in YTD
Soft drinks & soda	€261.7m	▲ +6.7%	€118.1m	▲ +5.5%	▲ +2.9%	▲ +1.7%	45%
Water (still & sparkling)	€137.6m	▲ +5.6%	€68.4m	▲ +1.6%	▲ +0.9%	▼ -1.2%	50%
Juices	€125.1m	▼ -5.4%	€59.2m	▼ -6.9%	▼ -7.9%	▼ -10.1%	47%
Sport drinks	€35.4m	▲ +13.6%	€17.2m	▲ +10.6%	▲ +15.1%	▲ +9.9%	49%
Ice tea	€23.2m	▼ -4.8%	€15.3m	▼ -8.2%	▲ +0.7%	▼ -3.0%	66%
RTD coffee	€6.8m	▲ +36.6%	€4.5m	▲ +40.4%	▲ +12.9%	▲ +13.5%	66%



“ Summer story

Our summer companion across every consumption occasion: hydration, a defence against thirst and small moments of pleasure.

Alcoholic Drinks

Aperitifs and tequila outpace a flat beer market



Value · YTD

€479.4m

▲ +2.9% vs LY

Value · Summer

€234.2m

▲ +2.0% vs LY

Units · YTD

119.3m

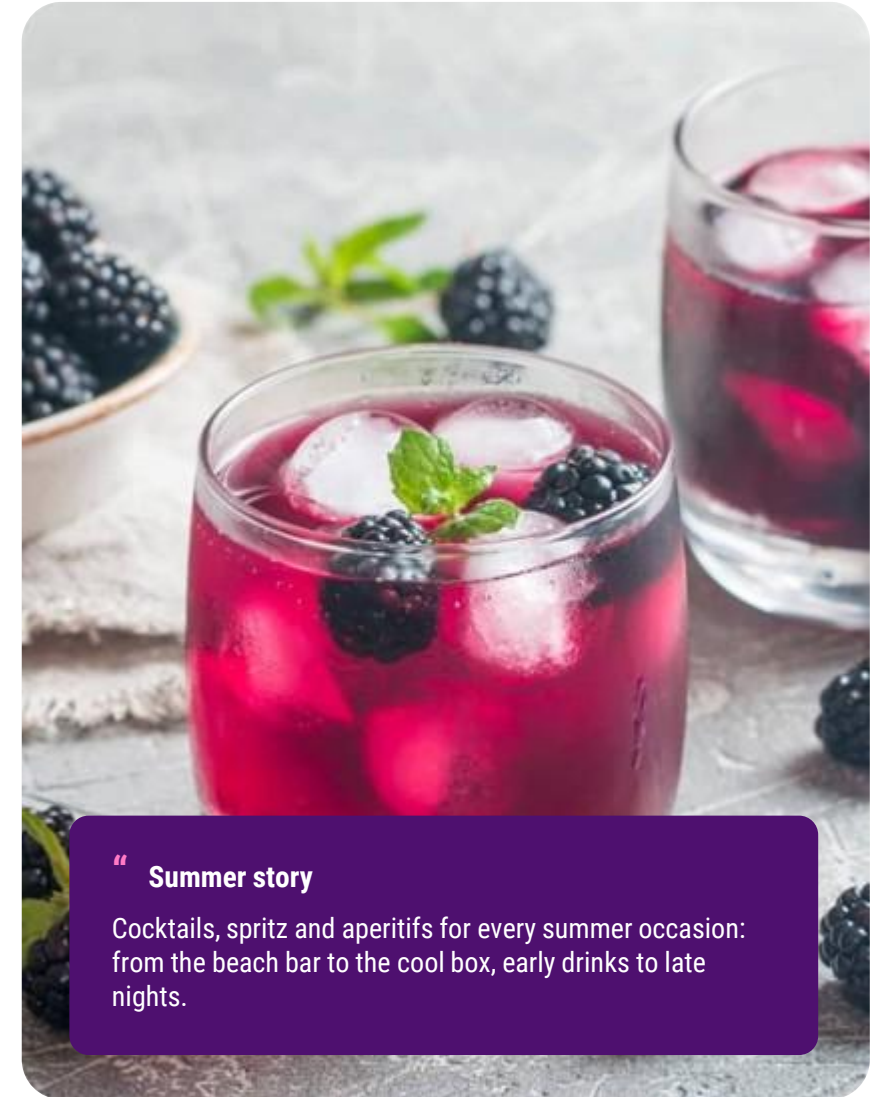
▲ +2.2% vs LY

Units · Summer

63.7m

▲ +1.3% vs LY

Seasonal category	Value YTD		Value Summer		Units YTD	Units Summer	☀ Summer share in YTD
Beer	€194.7m	▼ -0.1%	€113.3m	▼ -0.9%	▲ +1.5%	▼ -0.1%	58%
Ouzo & tsipouro	€35.3m	▲ +5.0%	€15.8m	▲ +3.5%	▲ +3.6%	▲ +1.9%	45%
Vodka	€22.0m	▲ +4.6%	€10.7m	▲ +3.5%	▲ +7.7%	▲ +11.6%	49%
Aperitifs & liqueurs	€15.4m	▲ +10.2%	€8.3m	▲ +10.7%	▲ +12.3%	▲ +14.2%	54%
Gin	€15.3m	▼ -1.8%	€8.3m	▼ -3.2%	▼ -5.5%	▼ -7.3%	54%
Rum	€6.7m	▼ -2.0%	€3.8m	▼ -5.3%	▼ -2.8%	▼ -6.2%	57%
Tequila	€3.2m	▲ +8.8%	€2.0m	▲ +7.4%	▲ +5.1%	▲ +3.4%	62%



“ Summer story

Cocktails, spritz and aperitifs for every summer occasion: from the beach bar to the cool box, early drinks to late nights.



"The king of summer"

Ice Cream

Value · YTD

€142.1m

▲ +4.8% vs LY

Value · Summer

€107.8m

▲ +4.1% vs LY

Units · YTD

35.8m

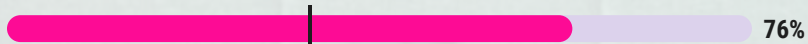
▲ +7.5% vs LY

Units · Summer

27.4m

▲ +7.6% vs LY

76% of YTD value is sold in summer



vs 41% for total supermarket FMCG (marker)



Olive Oil & Olives

Mediterranean cuisine takes centre stage in summer: mum's gemista, moussaka and of course the Greek salad, drive higher olive oil consumption.



Value · YTD	Value · Summer	Units · YTD	Units · Summer
€83.2m	€38.3m	7.6m	3.6m
▼ -5.1%	▲ +0.3%	▲ +3.9%	▲ +2.6%

Summer share of YTD value



Value · YTD	Value · Summer	Units · YTD	Units · Summer
€13.1m	€6.2m	5.2m	2.5m
▲ +21.0%	▲ +10.8%	▲ +20.9%	▲ +10.0%

Summer share of YTD value



Health & Beauty

Self-care season, with suncare at its peak



Value · YTD

€803.7m

▲ +3.8% vs LY

Value · Summer

€344.7m

▲ +4.3% vs LY

Units · YTD

257.4m

▲ +3.9% vs LY

Units · Summer

107.9m

▲ +4.1% vs LY

Seasonal category	Value YTD		Value Summer		Units YTD	Units Summer	☀ Summer share
Shampoo	€53.8m	▲ +2.8%	€23.9m	▲ +3.9%	▲ +3.1%	▲ +3.7%	44%
Deodorants	€48.5m	▲ +7.2%	€23.5m	▲ +10.2%	▲ +10.5%	▲ +8.6%	48%
Bath & shower	€41.6m	▲ +2.6%	€20.0m	▲ +1.5%	▲ +4.9%	▲ +3.4%	48%
Suncare	€26.8m	▲ +3.6%	€23.1m	▲ +3.7%	▲ +8.9%	▲ +8.8%	86%
Stylers	€18.4m	▲ +6.8%	€8.2m	▲ +10.4%	▲ +8.8%	▲ +10.3%	44%
Hand & body	€17.3m	▲ +10.1%	€8.3m	▲ +10.1%	▲ +8.9%	▲ +9.1%	48%
Female razors	€8.2m	▲ +8.3%	€4.1m	▲ +10.4%	▲ +9.8%	▲ +9.6%	50%
Shaving foams	€5.7m	▼ -1.7%	€2.6m	▲ +6.8%	▲ +4.6%	▲ +10.7%	45%
Colognes & perfumes	€4.9m	▲ +14.6%	€2.2m	▲ +20.4%	▲ +23.3%	▲ +33.0%	45%
Depilatories	€4.3m	▲ +4.6%	€2.2m	▲ +5.0%	▲ +1.9%	▲ +2.8%	50%
Baby powders	€0.6m	▼ -0.9%	€0.3m	▲ +3.6%	▼ -0.6%	▲ +2.2%	47%

“ Summer story

High temperatures (and sweat) on the one hand, and perhaps the summer positive mindset, make us take more care of ourselves and our bodies, with personal hygiene, care and beauty products.

Household

Insecticides and anti-moth products surge



Value · YTD	Value · Summer	Units · YTD	Units · Summer
€727.4m	€304.1m	274.7m	112.9m
▲ +4.6% vs LY	▲ +5.8% vs LY	▲ +3.7% vs LY	▲ +4.3% vs LY

Seasonal category	Value YTD		Value Summer		Units YTD	Units Summer	Summer share
Insecticides	€29.4m	▲ +9.8%	€22.8m	▲ +12.7%	▲ +6.1%	▲ +9.6%	78%
Mops	€10.4m	▲ +9.4%	€4.8m	▲ +10.3%	▲ +6.8%	▲ +6.0%	46%
Brooms	€8.5m	▲ +8.7%	€3.9m	▲ +11.8%	▲ +10.4%	▲ +12.9%	45%
Toilet soaps	€8.1m	▲ +5.0%	€3.6m	▲ +3.6%	▼ -5.6%	▼ -7.5%	45%
Anti-moth products	€6.6m	▲ +4.4%	€3.1m	▲ +22.5%	▲ +2.2%	▲ +15.7%	47%
Buckets	€3.4m	▲ +11.2%	€1.5m	▲ +5.1%	▲ +13.5%	▲ +11.0%	46%
Broom sticks	€2.4m	▲ +3.1%	€1.2m	▲ +1.5%	▲ +6.6%	▲ +5.2%	48%



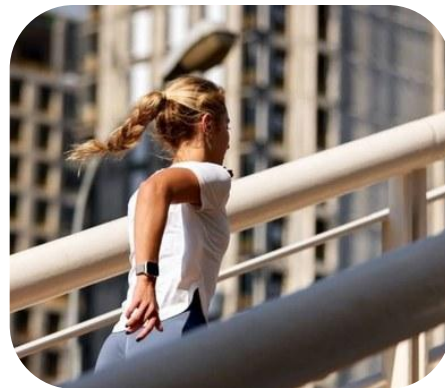
“ Summer story

Shopping for the summer house, the airbnb or the island room on one hand, and defend against insects on the other, boosts sales of specific household products.

Diet Categories

But before we hit the beach

April–June is peak season for consumers starting calorie-restricted diets to lose weight, alongside rising attendance at gyms and fitness centres. **This lifts the food categories that support their goals and supplement their meal plans**



Diet Categories

Protein leads the pre-summer diet season



Value · YTD

€571.5m

▲ +17.5% vs LY

Value · Apr–Jun

€226.4m

▲ +17.6% vs LY

Value · Q2 vs Q1

+11.6%

pre-summer peak

Units · Apr–Jun

94.2m

▲ +14.3% vs LY

Category	Value YTD		Value Apr–Jun vs LY		Units YTD	Units Q2 vs LY	Q2 vs Q1 value
EVERYDAY PROTEIN STAPLES							
Sealed/trad. yoghurt	€281.6m	▲ +13.2%	€112.0m	▲ +13.4%	▲ +10.3%	▲ +9.8%	+14.1%
Eggs	€120.1m	▲ +22.7%	€46.0m	▲ +23.3%	▲ +10.8%	▲ +10.6%	+3.1%
Canned fish	€84.5m	▲ +13.0%	€33.4m	▲ +10.0%	▲ +14.3%	▲ +12.7%	+6.7%
Cottage cheese	€36.2m	▲ +58.6%	€15.0m	▲ +59.8%	▲ +65.2%	▲ +67.9%	+20.8%
Sugar substitutes	€9.2m	▲ +3.8%	€3.6m	▲ +5.2%	▲ +0.7%	▲ +5.2%	+1.3%
PROTEIN & BETTER-FOR-YOU SNACKS							
Protein desserts*	€17.0m	▲ +14.1%	€7.1m	▲ +16.8%	▲ +14.4%	▲ +17.7%	+32.8%
Protein bars	€10.4m	▲ +15.4%	€4.3m	▲ +17.5%	▲ +23.5%	▲ +29.3%	+19.0%
Protein drinks	€7.4m	▲ +33.6%	€3.0m	▲ +41.6%	▲ +29.1%	▲ +33.1%	+35.5%
Egg white drinks	€4.0m	▲ +33.5%	€1.6m	▲ +37.8%	▲ +29.7%	▲ +33.6%	+12.1%
Rice wafers	€1.1m	▲ +50.0%	€0.5m	▲ +55.5%	▲ +41.3%	▲ +45.8%	+37.1%



The common denominator: high protein content with low calories.

Diet story

Cottage cheese is the standout: +59.8% value vs LY in April–June (+67.9% units). Protein drinks, desserts and rice wafers jump 33–37% from Q1 to Q2, right when diets start.



Until next Summer...

Thank you!!

Vangelis Foskolos

Retail Sales & Insights Director