



Market View YTD August 2026

Trends of the Greek FMCG environment

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Study ID

01

Metrics

Value & Unit Sales

02

Channels

Super / Hyper Markets

03

Areas

Greece Mainland, Crete & Islands

04

Periods

YR 2025 vs YR 2024

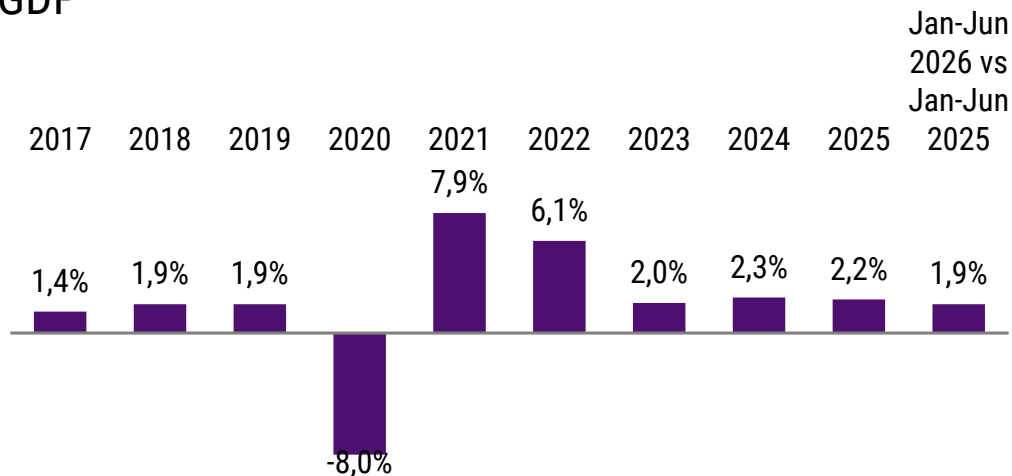
YTD August 2026 vs YTD August 2025

Greek Economy

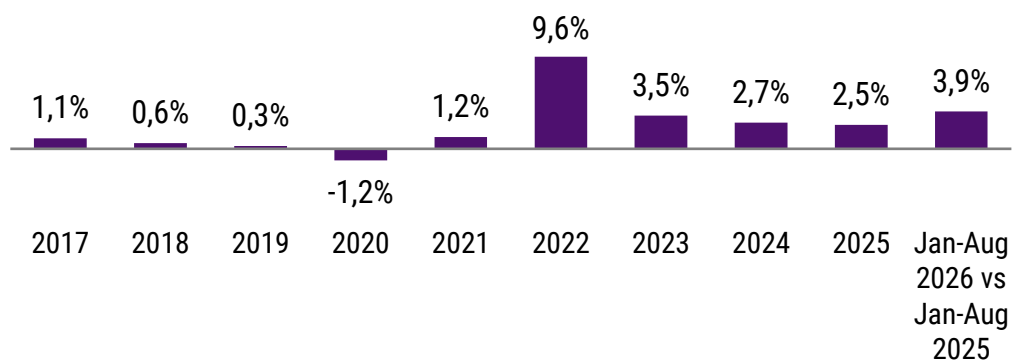
01

Greek Economy

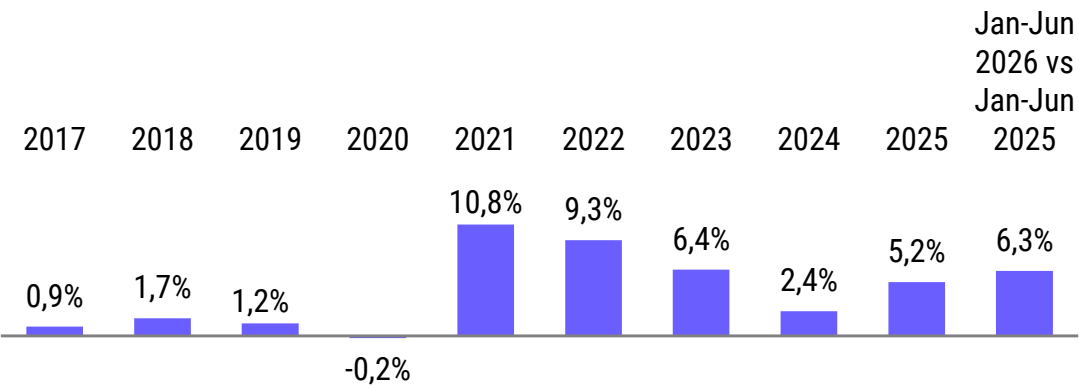
GDP



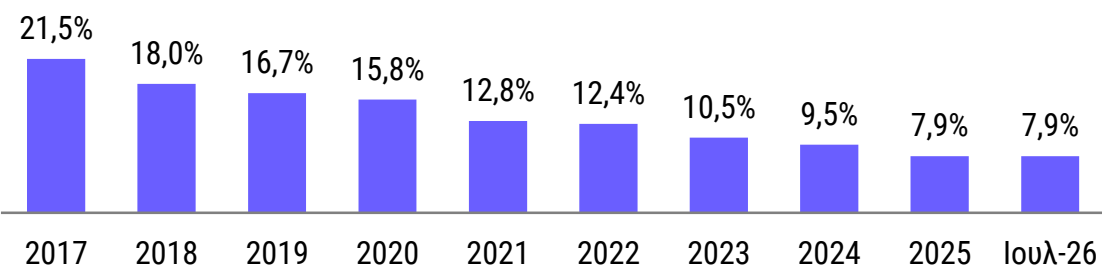
INFLATION RATE TREND



RETAIL TURNOVER INDEX (w.o AUTOMOTIVE FUEL)



UNEMPLOYMENT



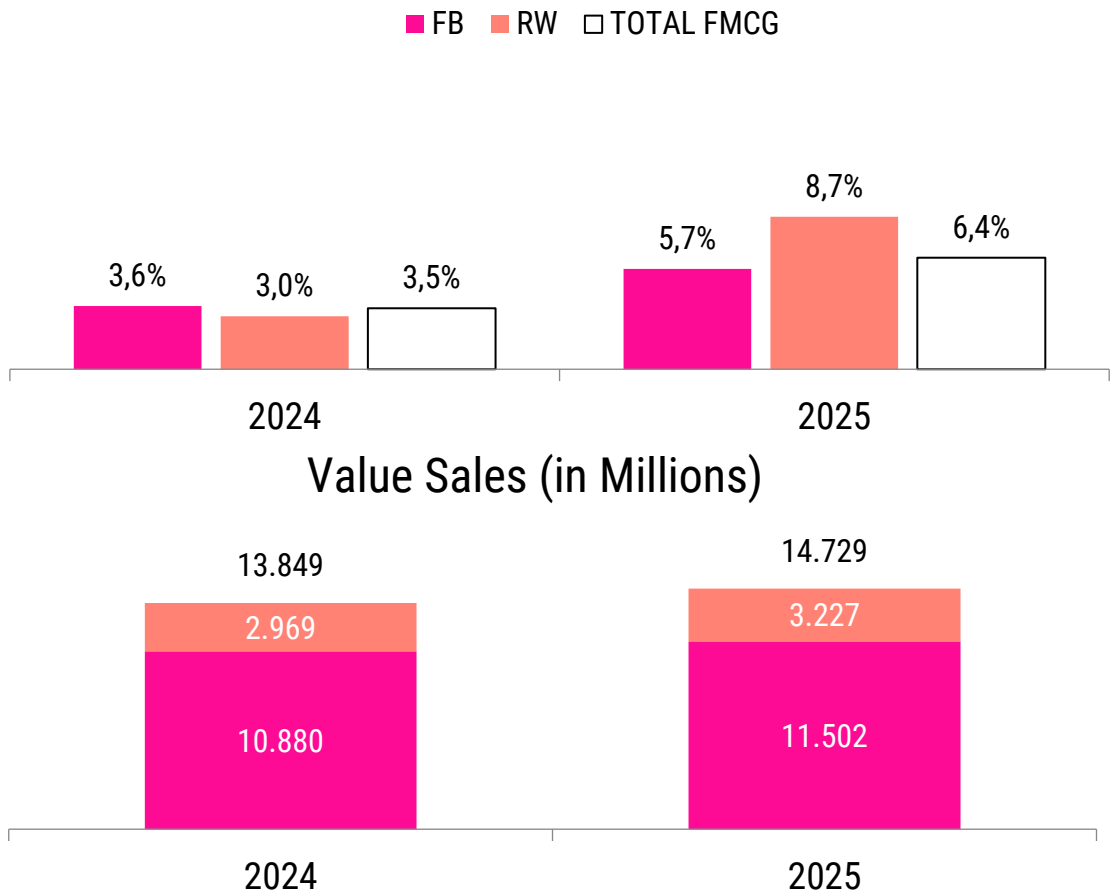
Trends for FMCG Market

Fixed Barcodes & Random Weight

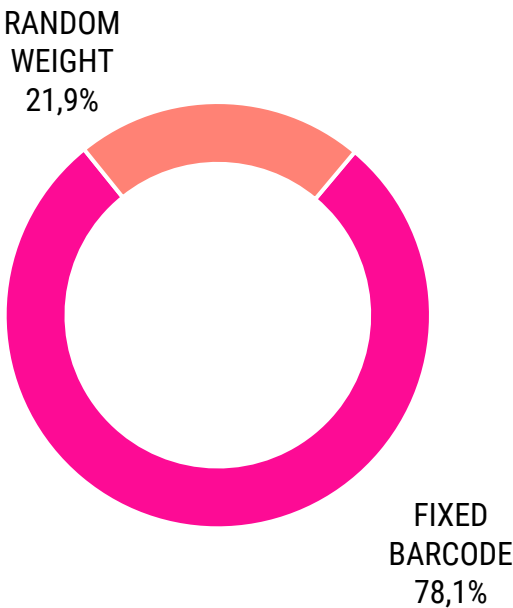
02

FMCG Value Sales Trend – Year 2025

Growth by 6.4% for Total FMCG Market in 2025, coming from both Segments (more intense for RW Products)

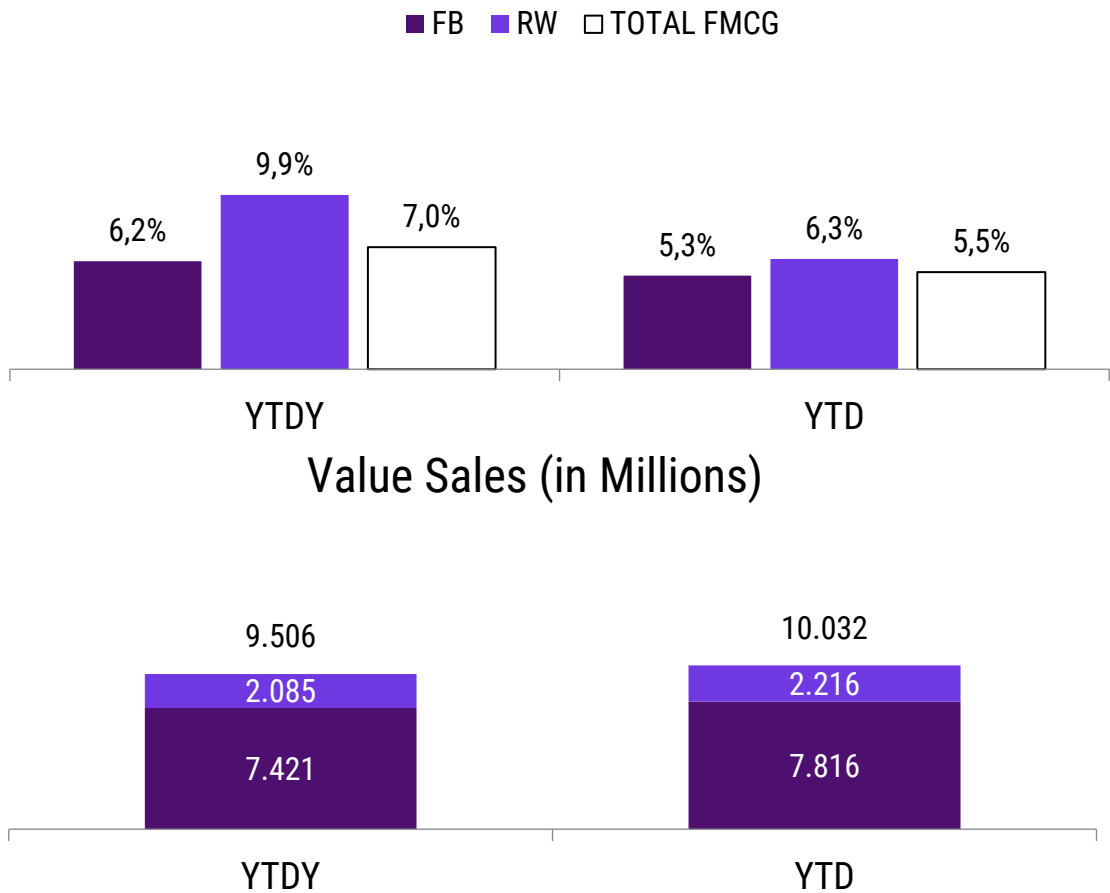


2025 Value Contribution

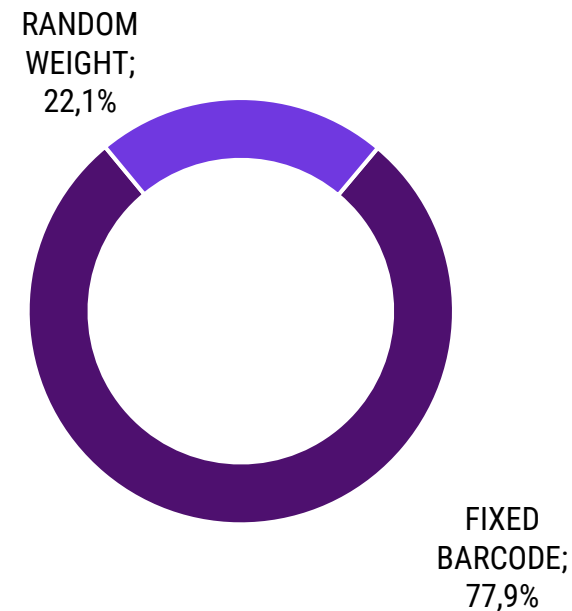


FMCG Value Sales Trend – YTD 2026

Increase for Total FMCG in YTD 26 (+5.5%) due to both Segments

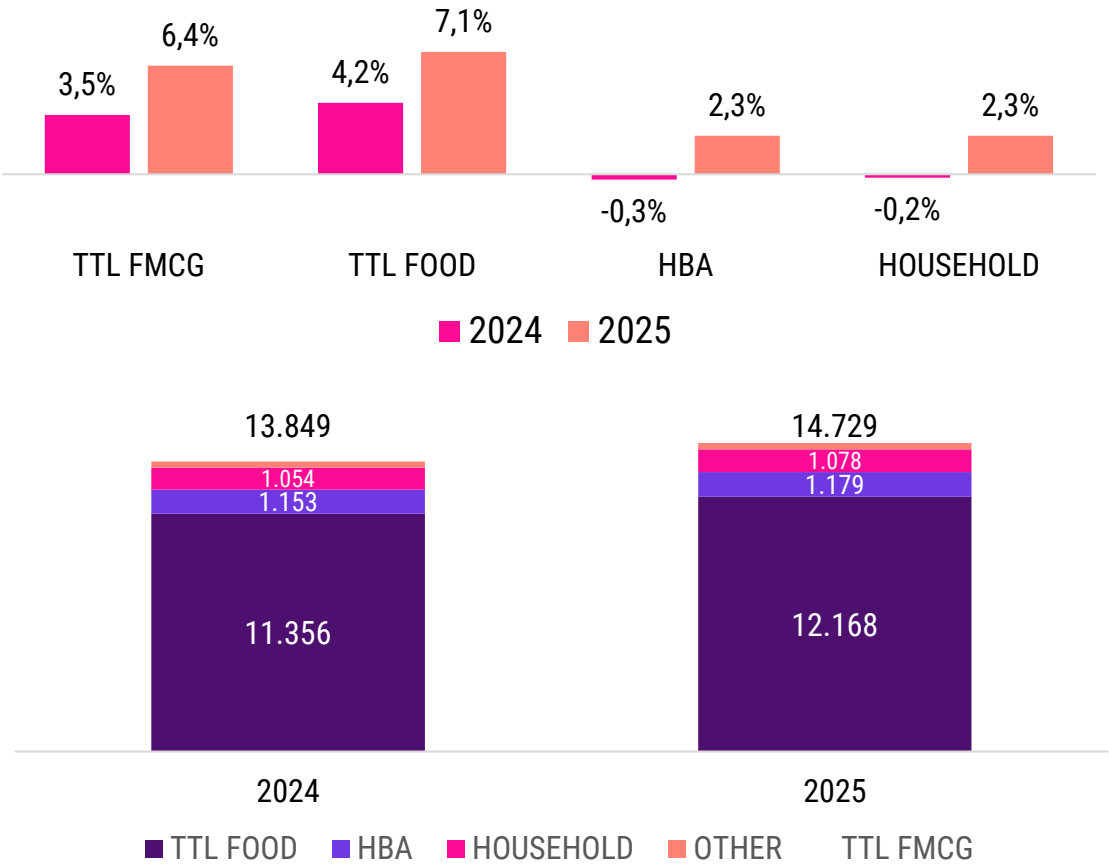


YTD 2026 Value Contribution

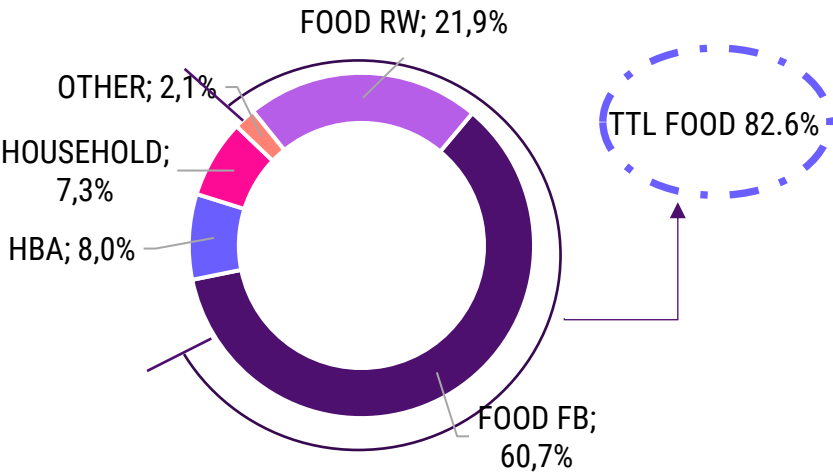


FMCG Value Sales Trend – Year 2025

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

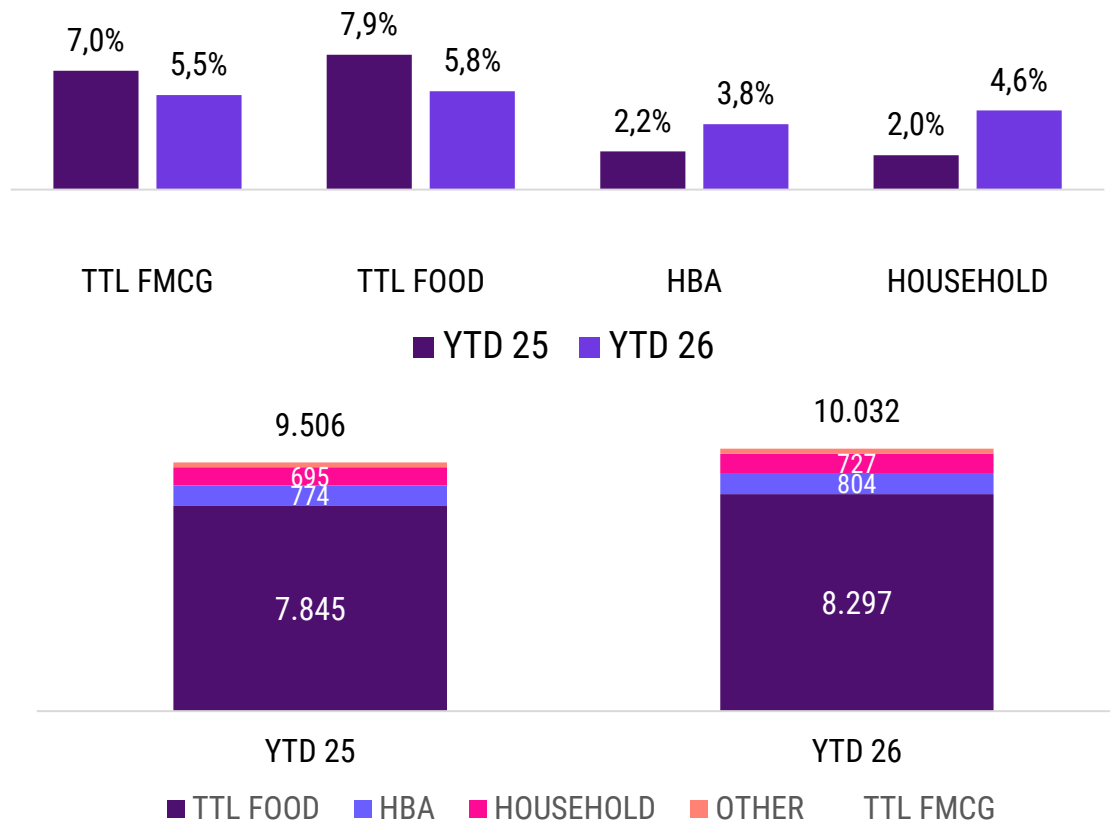


2025 Value Contribution

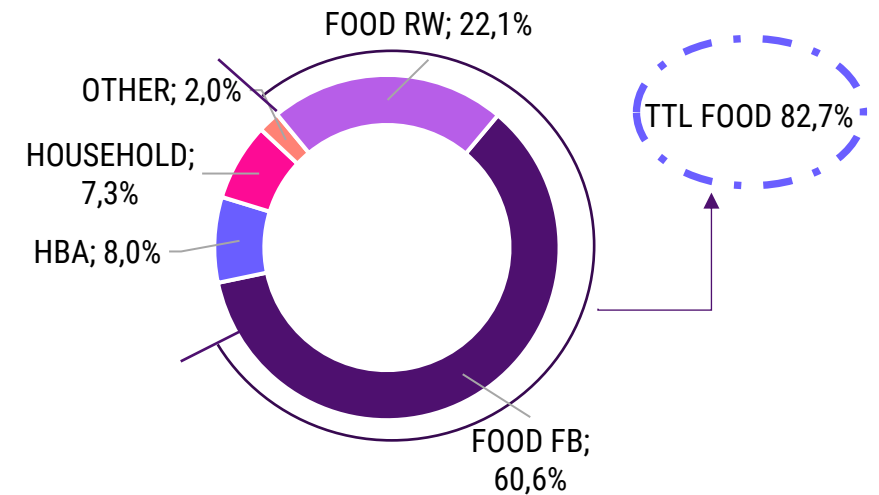


FMCG Value Sales Trend – YTD

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



YTD 26 Value Contribution



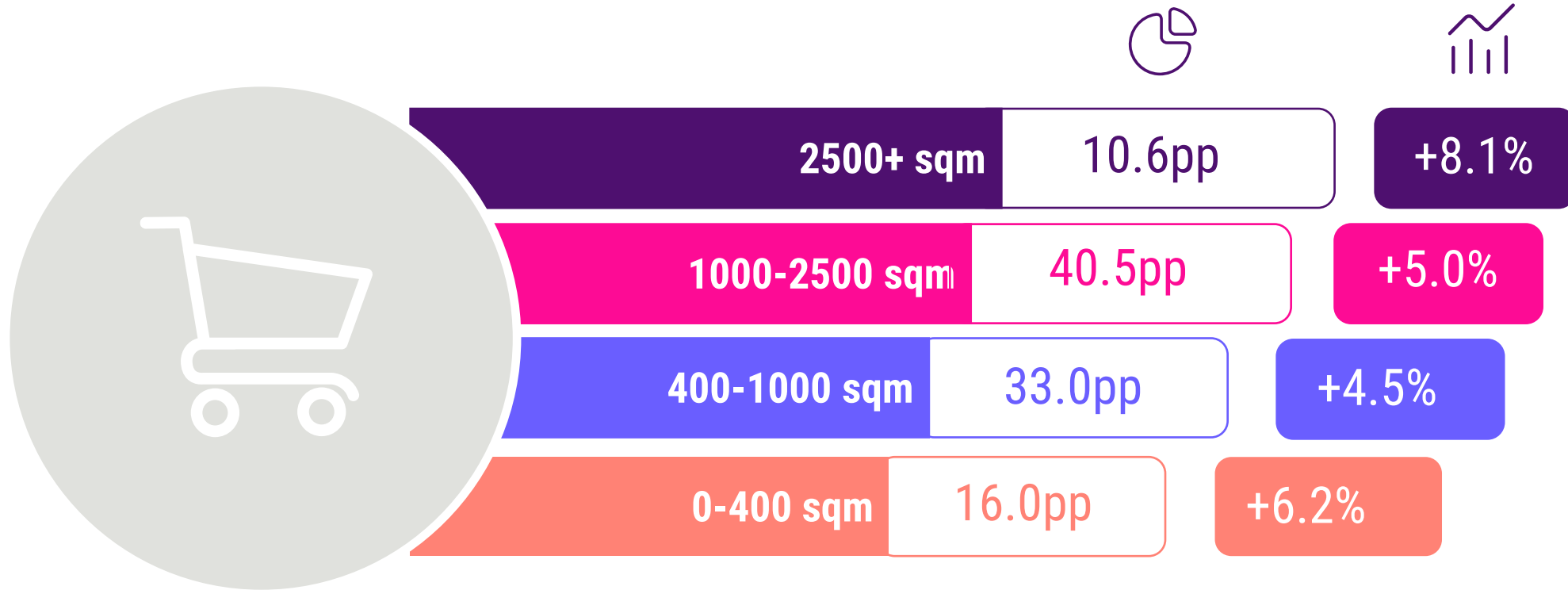
Trends for FMCG Market

Fixed Barcodes

03

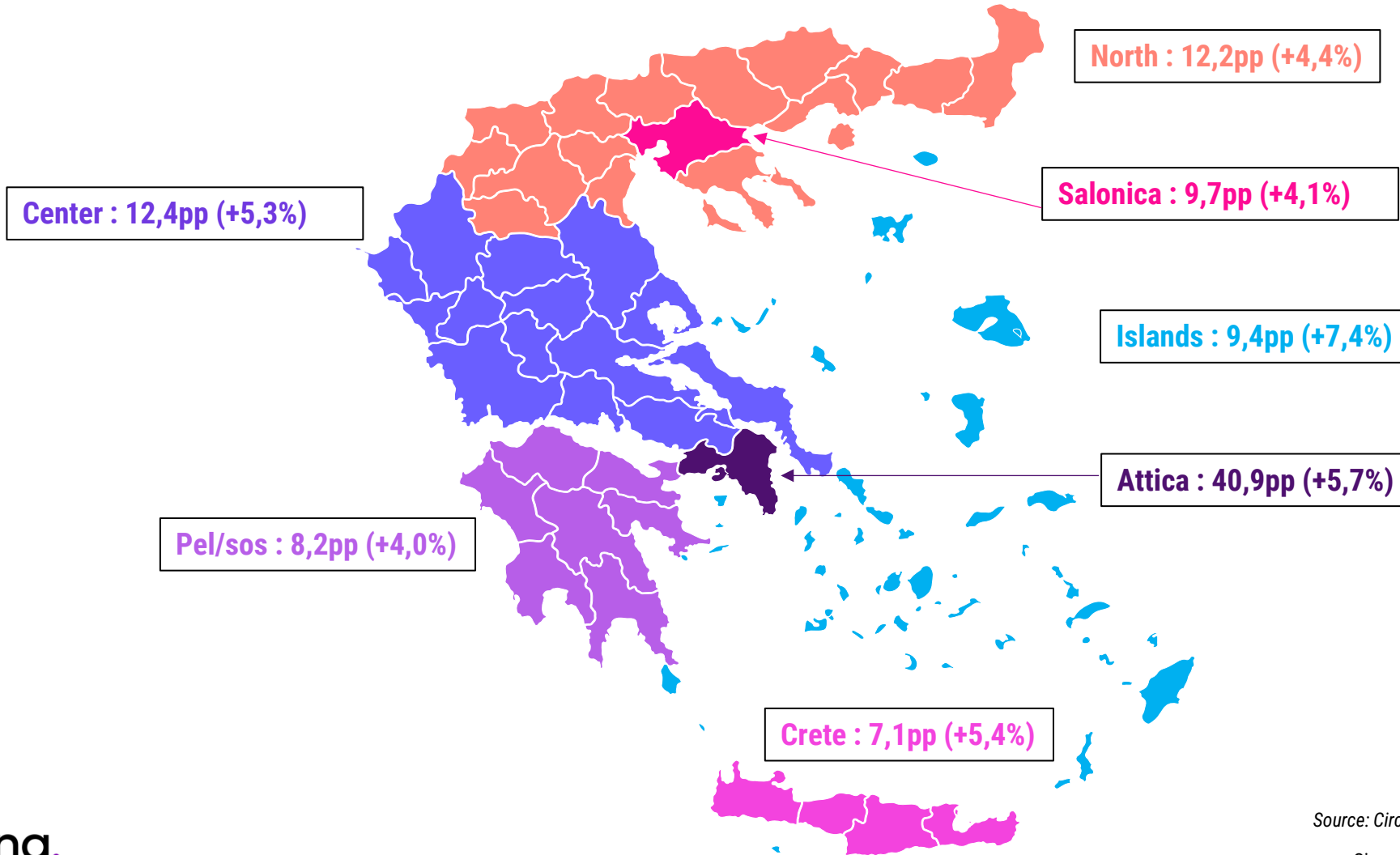
FMCG Value Sales Trends per Store Type YTD

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



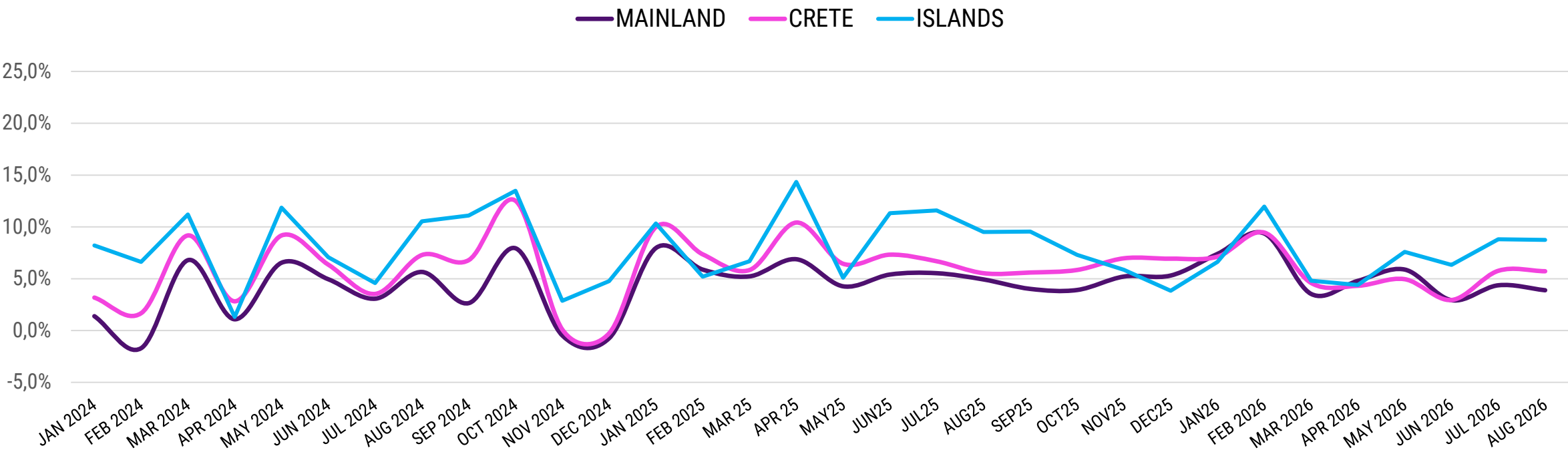
FMCG Value Sales Trends per Geo

Islands achieve more intense growth for YTD 26



FMCG Monthly Value Growth

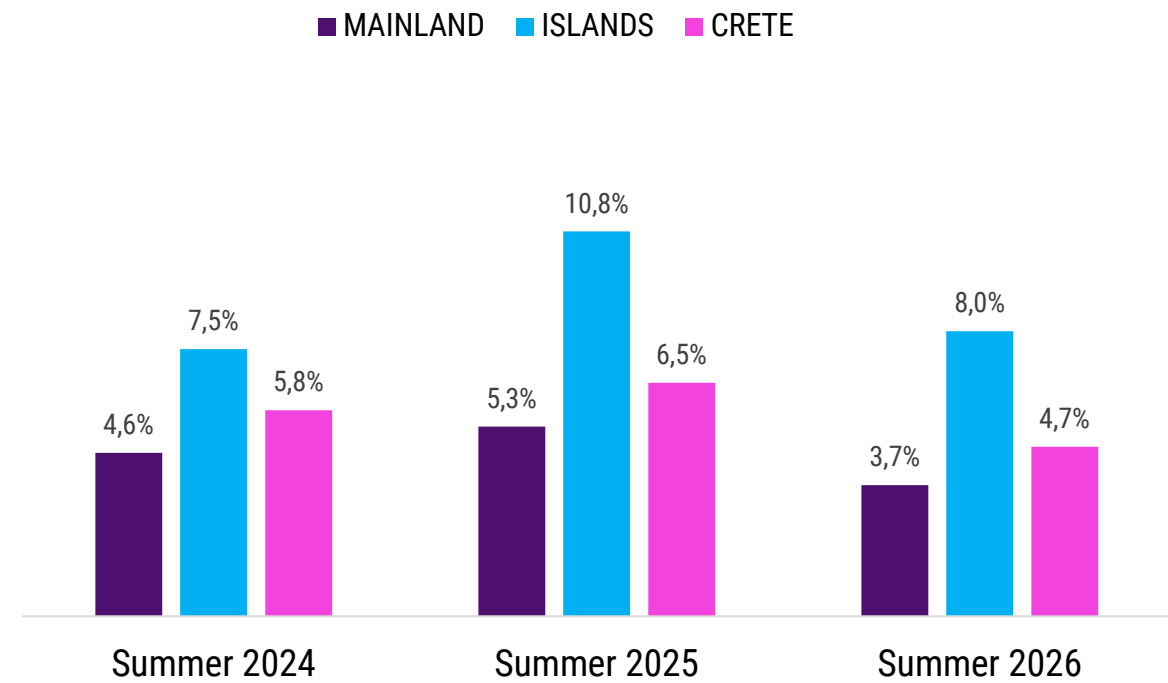
Intense growth during Summers for Islands & Crete, more intense for Islands during Summer 2026



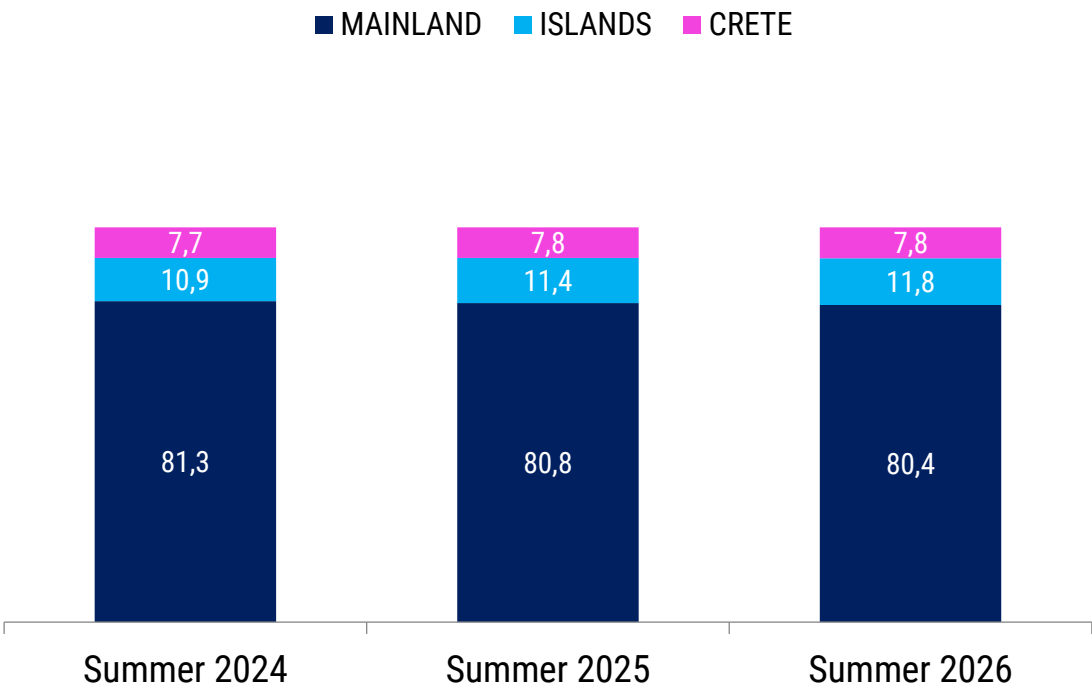
FMCG Value Growth during Summers

Intense growth during Summers for Islands

Value Growth

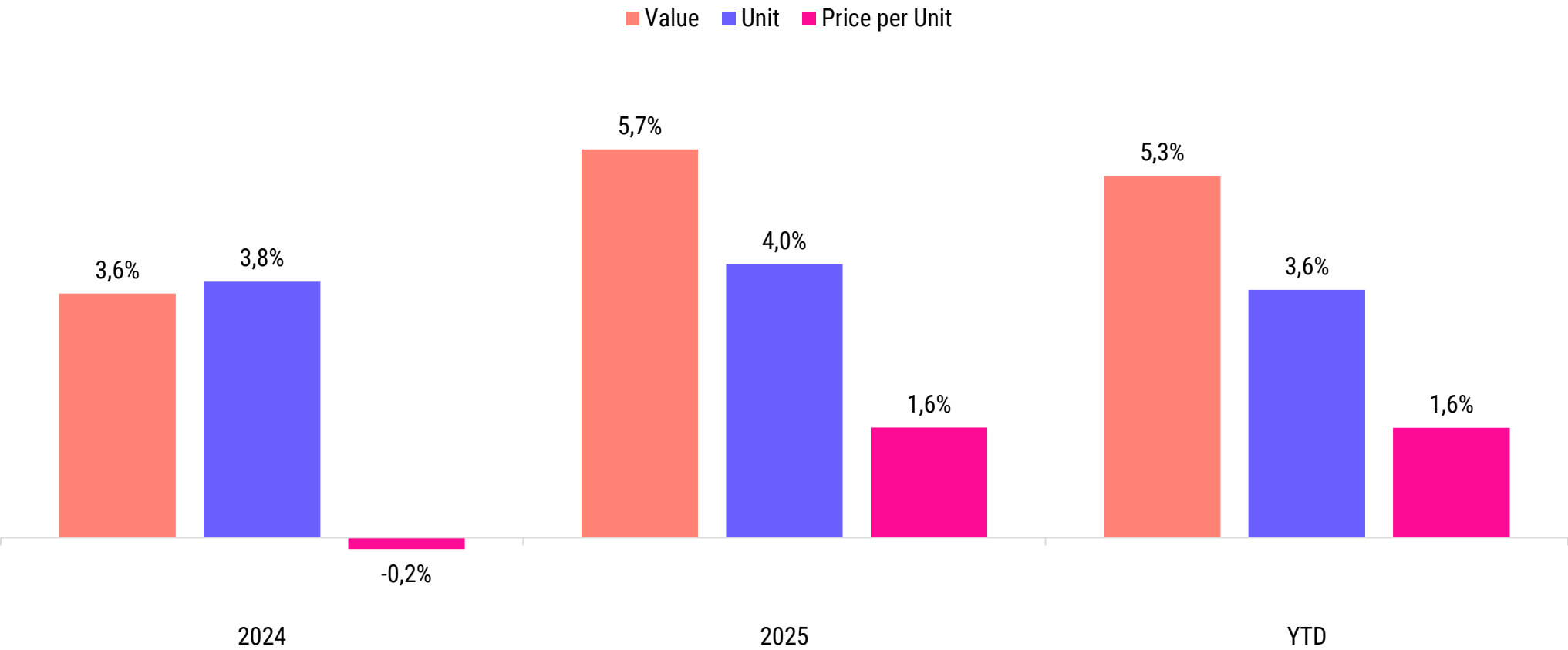


Value Contribution



FMCG Price Trends

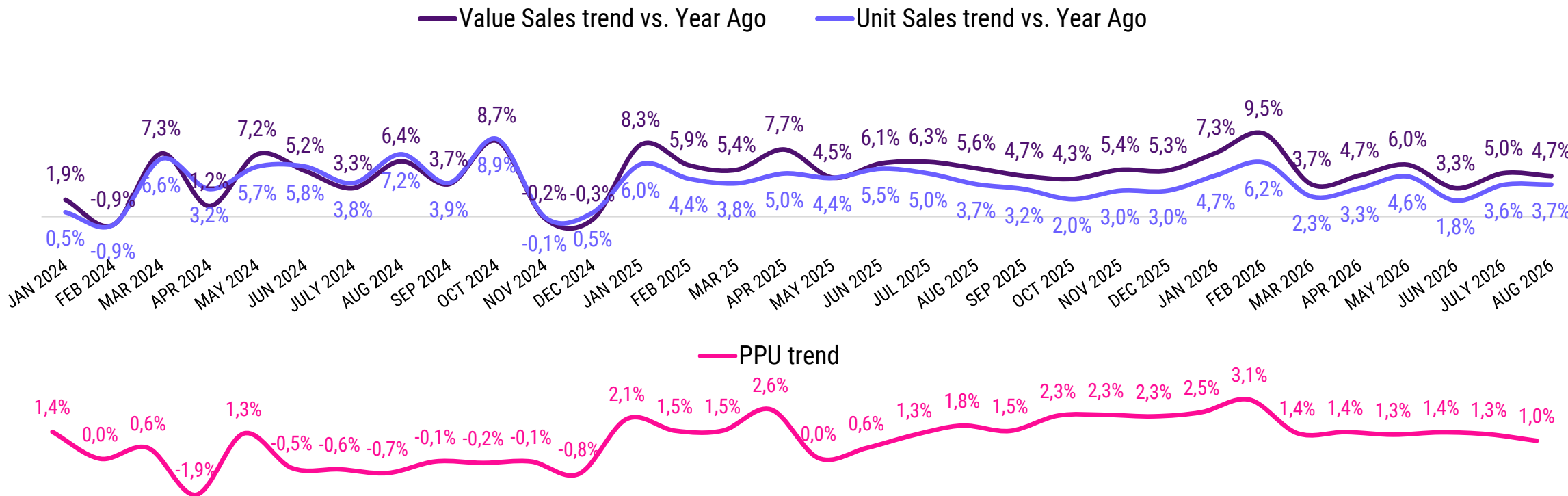
More intense increase in Value during YTD 26



FMCG Value and Unit Monthly Trends

Lower gap between value and unit growth during the last months

YR 2024: +3.6%
YR 2025: +5.7%
YTD 2026: +5.3%



Evolution

Giga Categories

04

Giga Categories Value Sales Trend

Food manages the highest increase in YTD 26

		YEAR 2025	YTD 2026
Food		+6,6	+5,6
Health & Beauty		+2,3	+3,8
Household		+2,3	+4,6

Giga Categories Unit Sales Trend

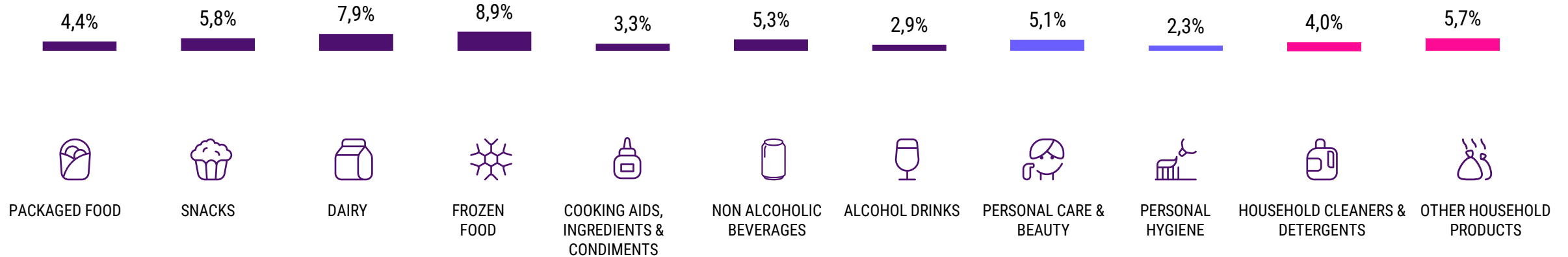
Slower growth rate for Food and Household Unit Sales, compared to their Values in YTD 26

		YEAR 2025	YTD 2026
Food		+4,0	+3,5
Health & Beauty		+3,5	+3,9
Household		+2,9	+3,7

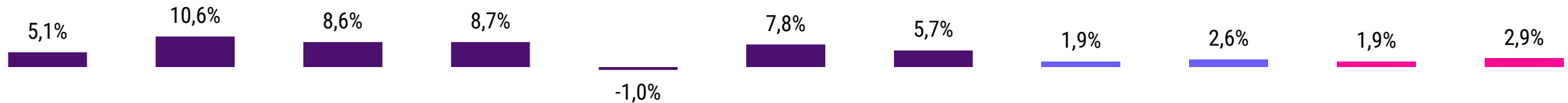
Categories Value Sales Trend YTD

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

Value Sales Trend YTD 2026



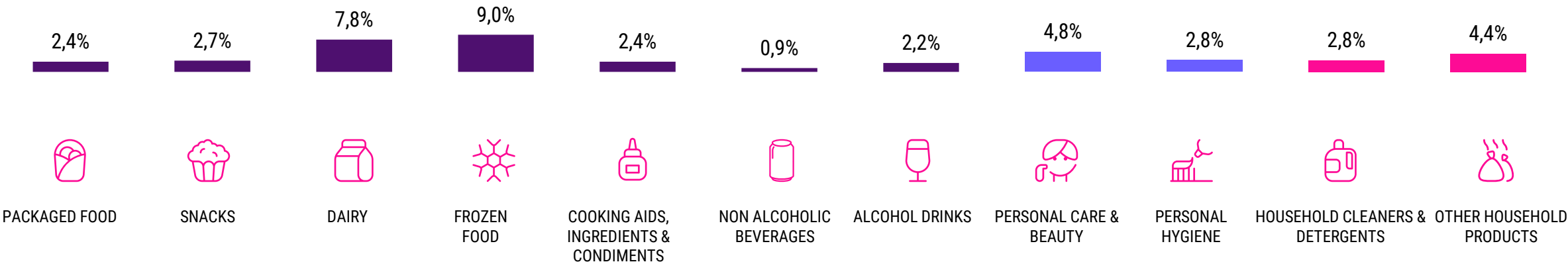
Value Sales Trend 2025



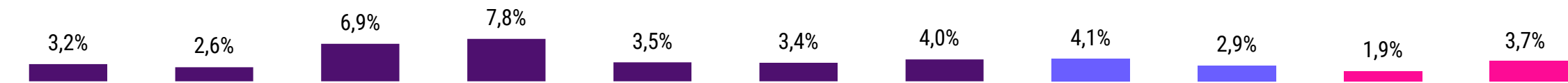
FMCG Unit Sales Trend YTD

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

Unit Sales Trend YTD 2026



Unit Sales Trend 2025



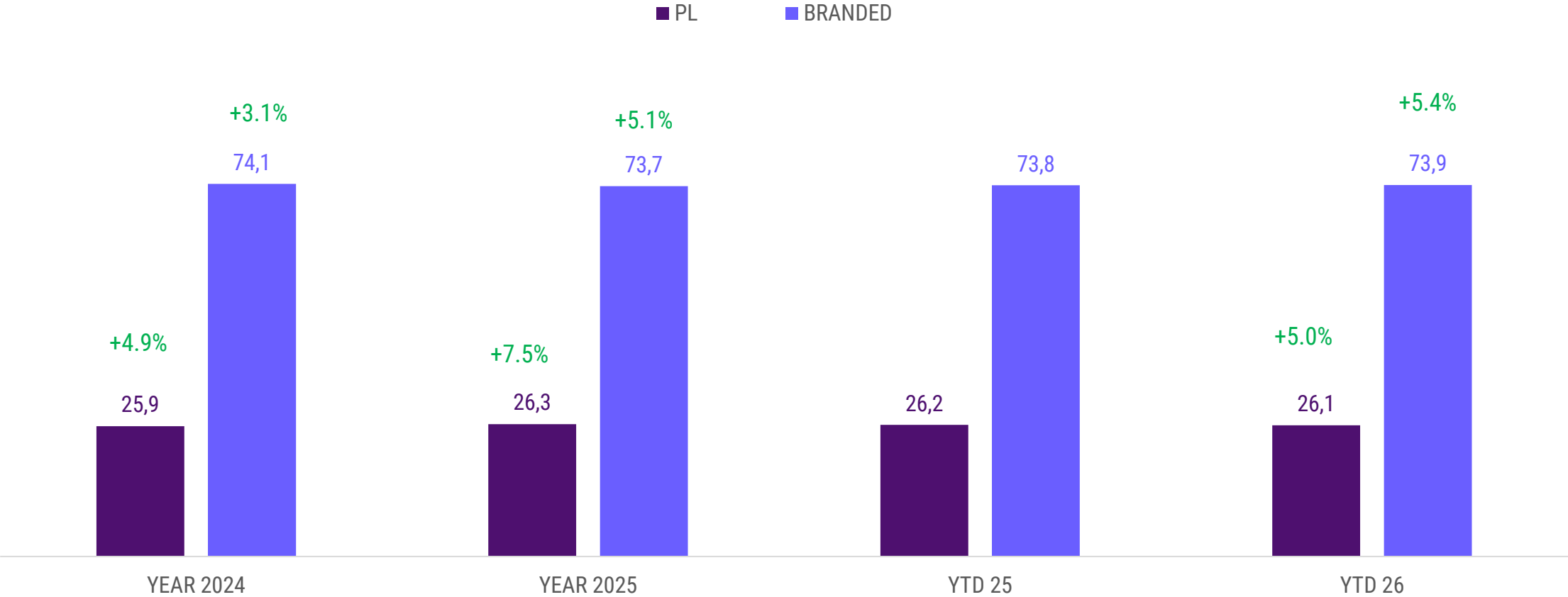
Evolution

Private Labels

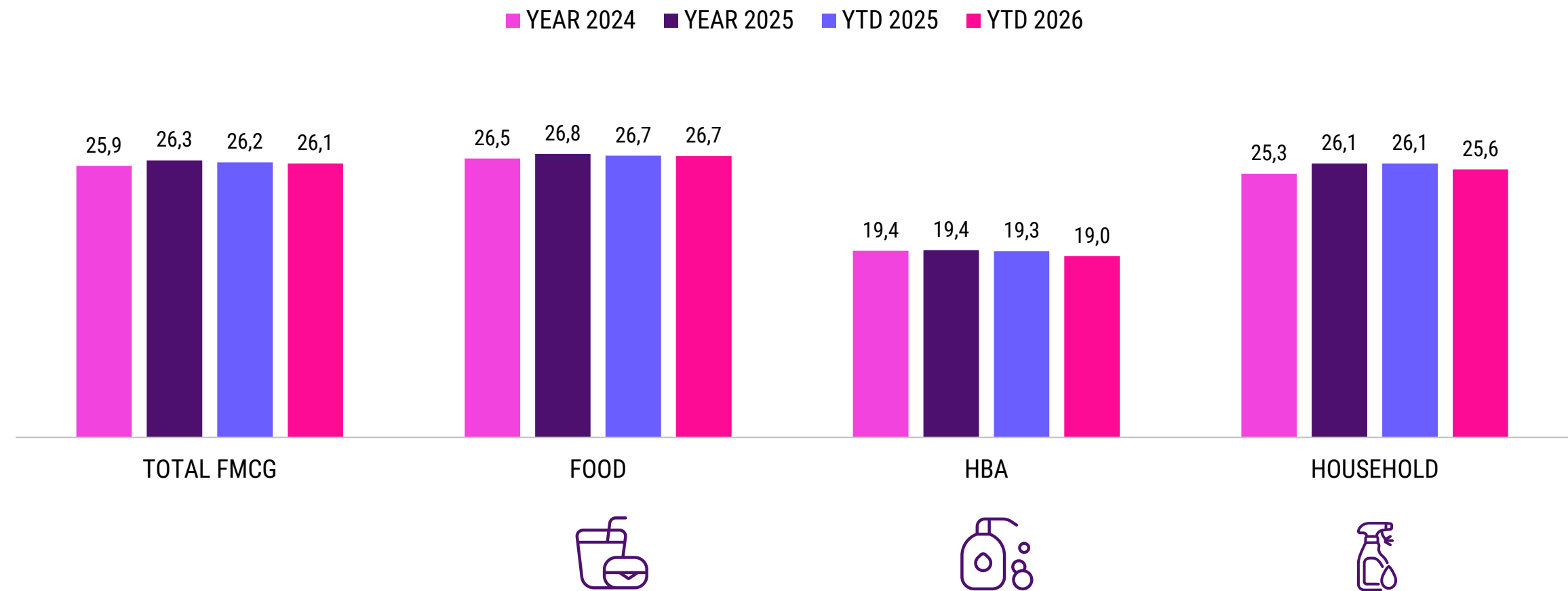
05

PL and Branded Value Shares and Trends

After a long time, Branded manage higher growth rate than PL



PL Value Share per Giga Category



Price Trends

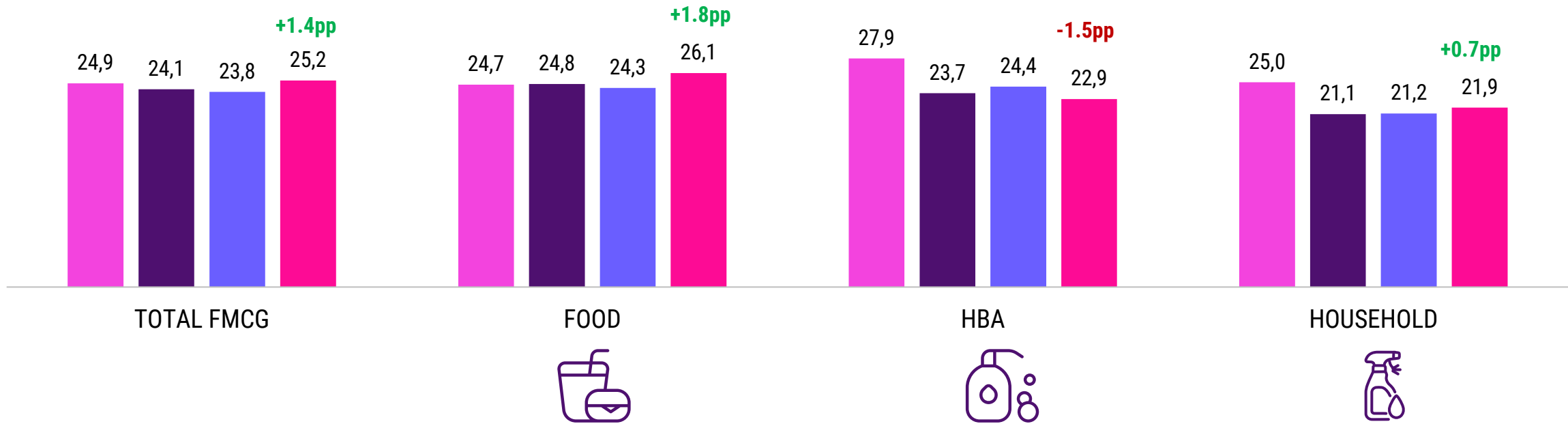
& Promotional Pressure

06

%Value Sales due to Temporary Price Reduction

Increased promo intensity for Food in YTD 26

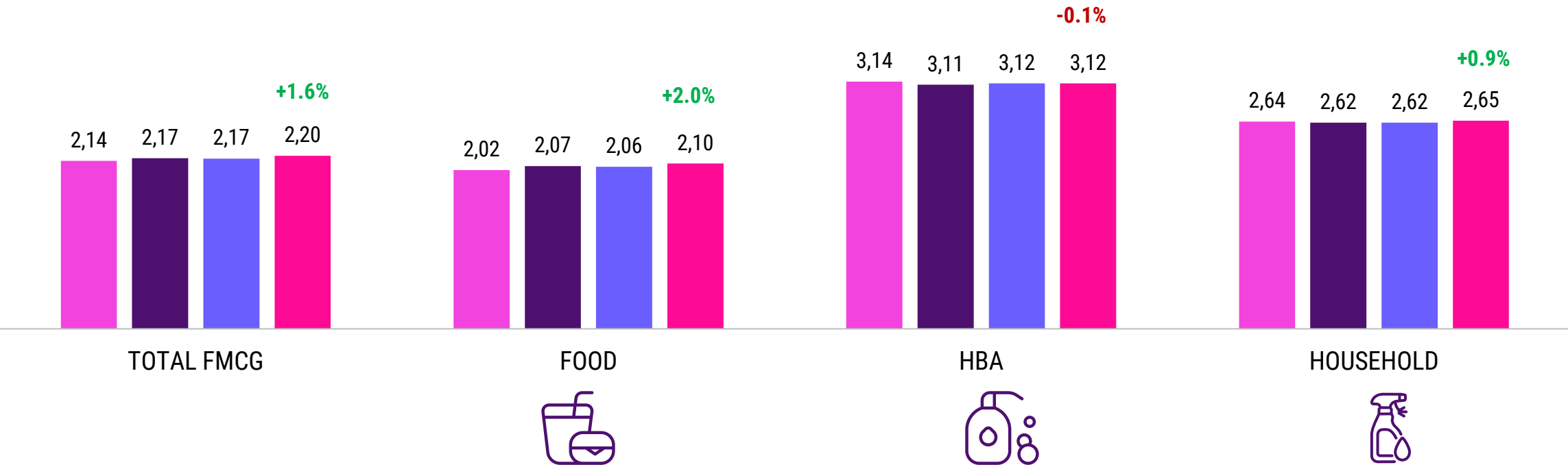
■ YEAR 2024 ■ YEAR 2025 ■ YTD 2025 ■ YTD 2026



Price per Unit per Giga Category

Low Price increase, mainly due to Food

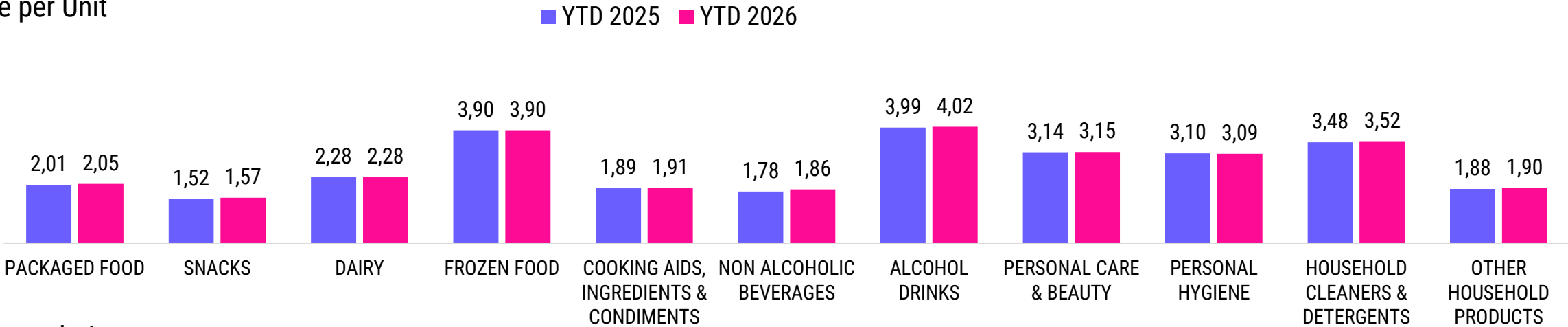
YEAR 2024 YEAR 2025 YTD 25 YTD 26



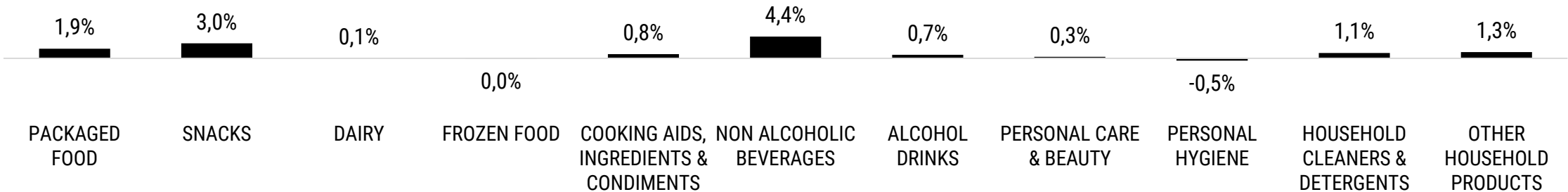
Price per Unit per Category

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

Price per Unit



Price evolution



Random Weight

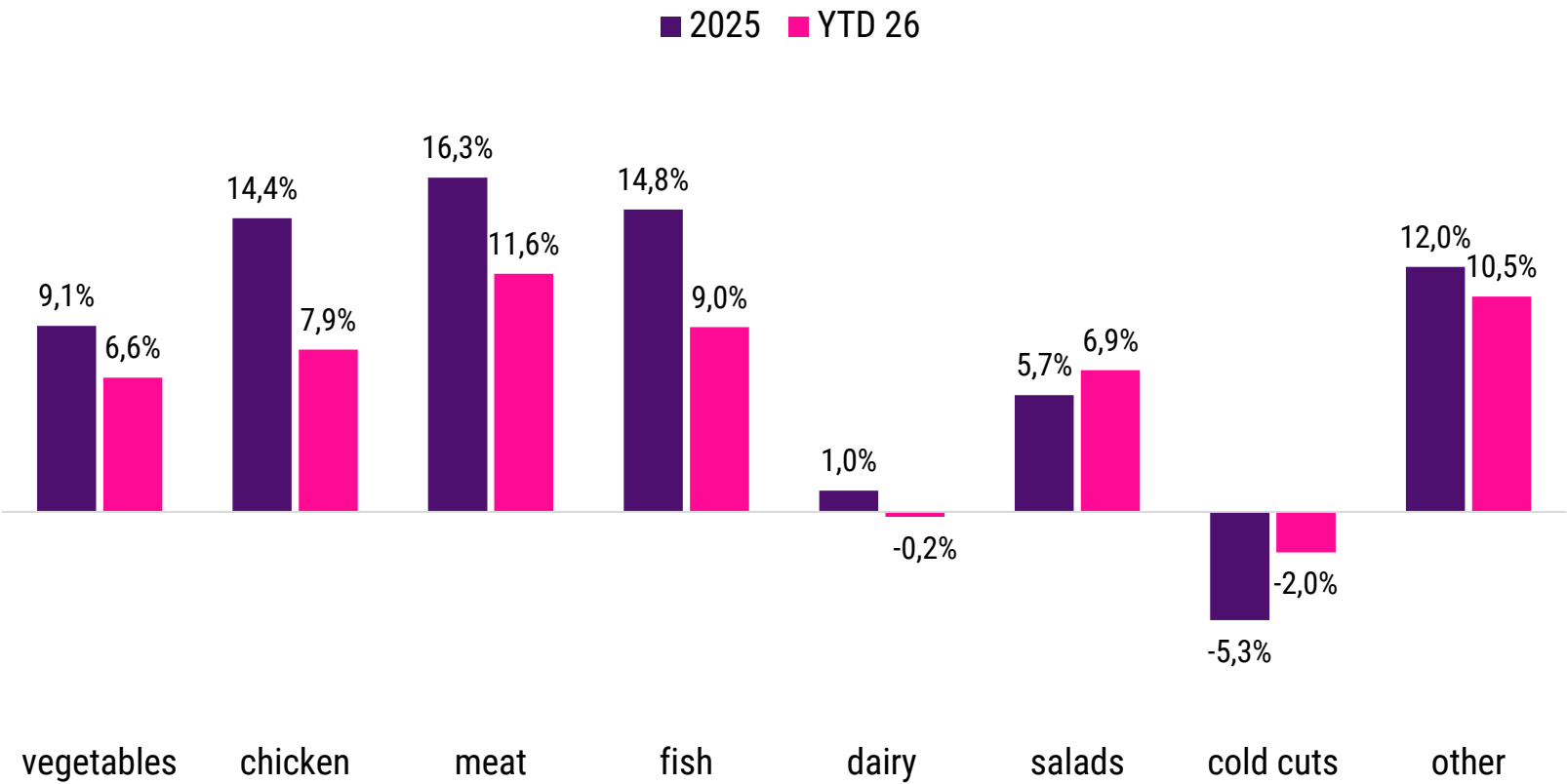
07

Random Weight

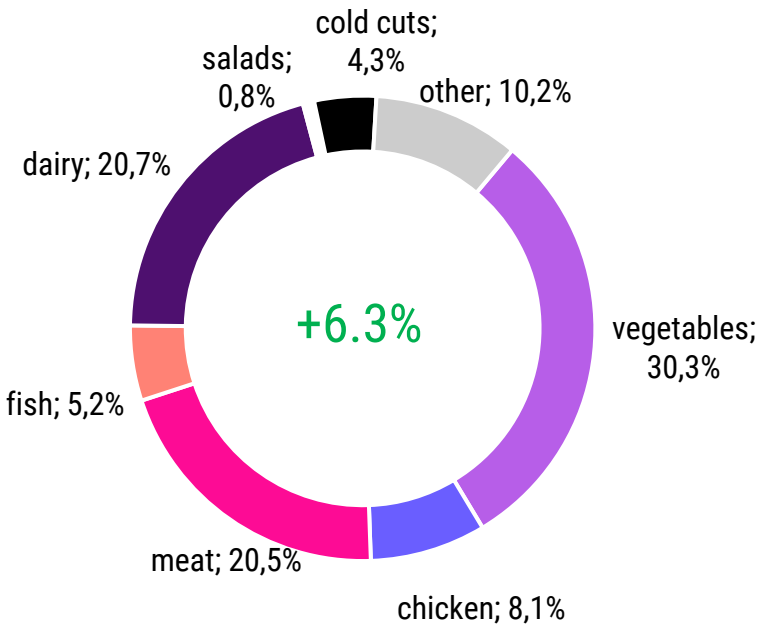
Value Sales Trend

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 August 26

Online Grocery

08

eRetail Audit Panel Turnover

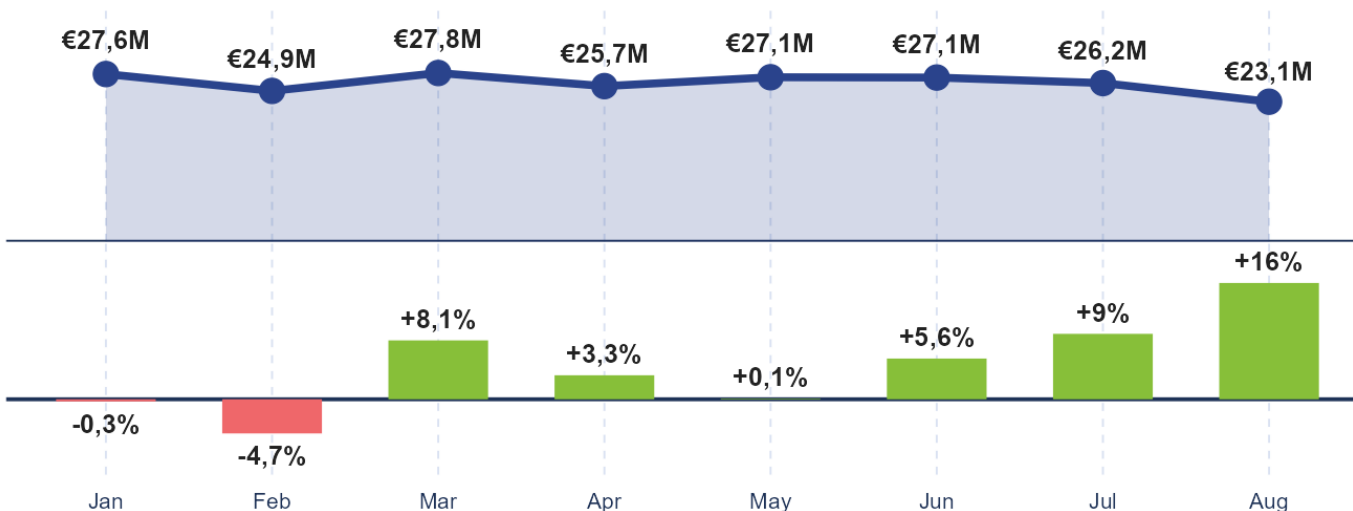
Sales Value incl. VAT

€209M

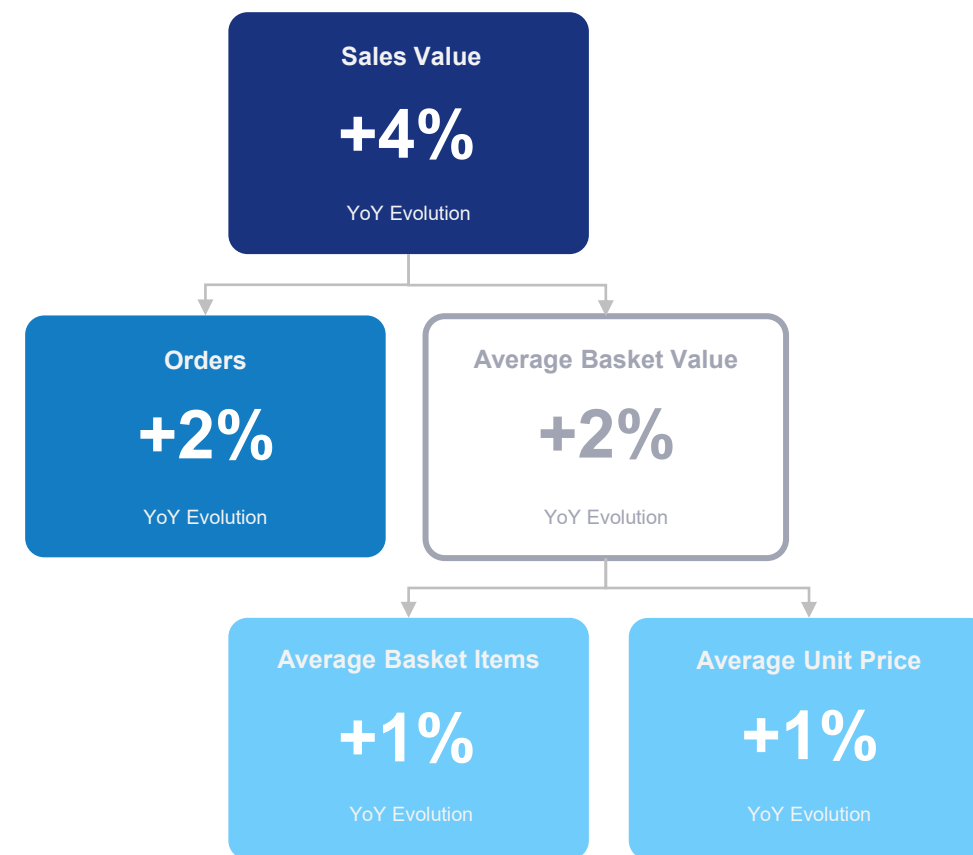
YoY Evolution

+4%

Monthly Sales Value & YoY Evolution

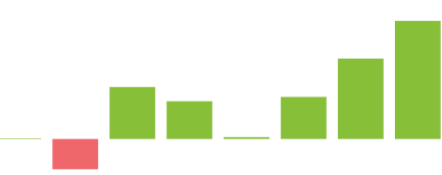


Sales Value Decomposition & Growth Drivers



Mega Categories Overview

1/2

Fresh Food	Basic Packaged Food	Cleaning Products & Paper for Household Use	Bottled Beverages, Soft Drinks, Water & Drink Mixes	Frozen foods
Sales Value Weight	Sales Value Weight	Sales Value Weight	Sales Value Weight	Sales Value Weight
35% +1pp	21% 0pp	14% 0pp	11% 0pp	6% 0pp
YoY Evolution in Sales Value	YoY Evolution in Sales Value	YoY Evolution in Sales Value	YoY Evolution in Sales Value	YoY Evolution in Sales Value
+5%	+2%	+3%	0%	+5%
				
J F M A M J J A	J F M A M J J A	J F M A M J J A	J F M A M J J A	J F M A M J J A
Contribution to Growth	Contribution to Growth	Contribution to Growth	Contribution to Growth	Contribution to Growth
+2pp	0pp	0pp	0pp	0pp

Mega Categories Overview

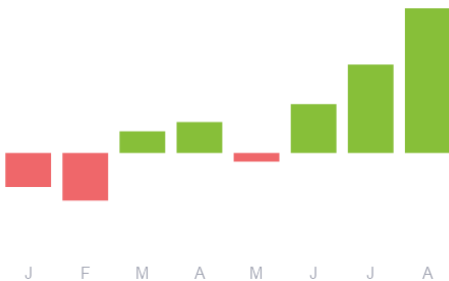
Beauty & Health

Sales Value Weight

6% 0pp

YoY Evolution in Sales Value

+4%



Contribution to Growth

0pp

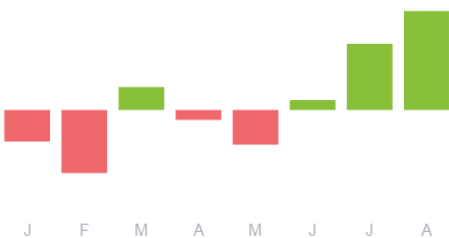
Bakery

Sales Value Weight

3% 0pp

YoY Evolution in Sales Value

0%



Contribution to Growth

0pp

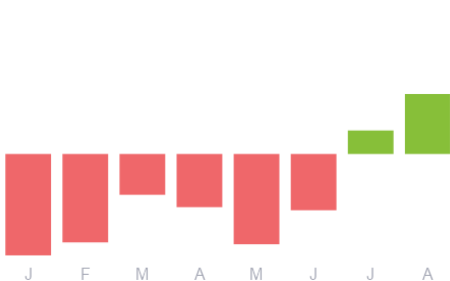
Baby & Kid

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

Thank you.