Circana.

Market View YTD September 2026

Trends of the Greek FMCG environment

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Market View

Study ID

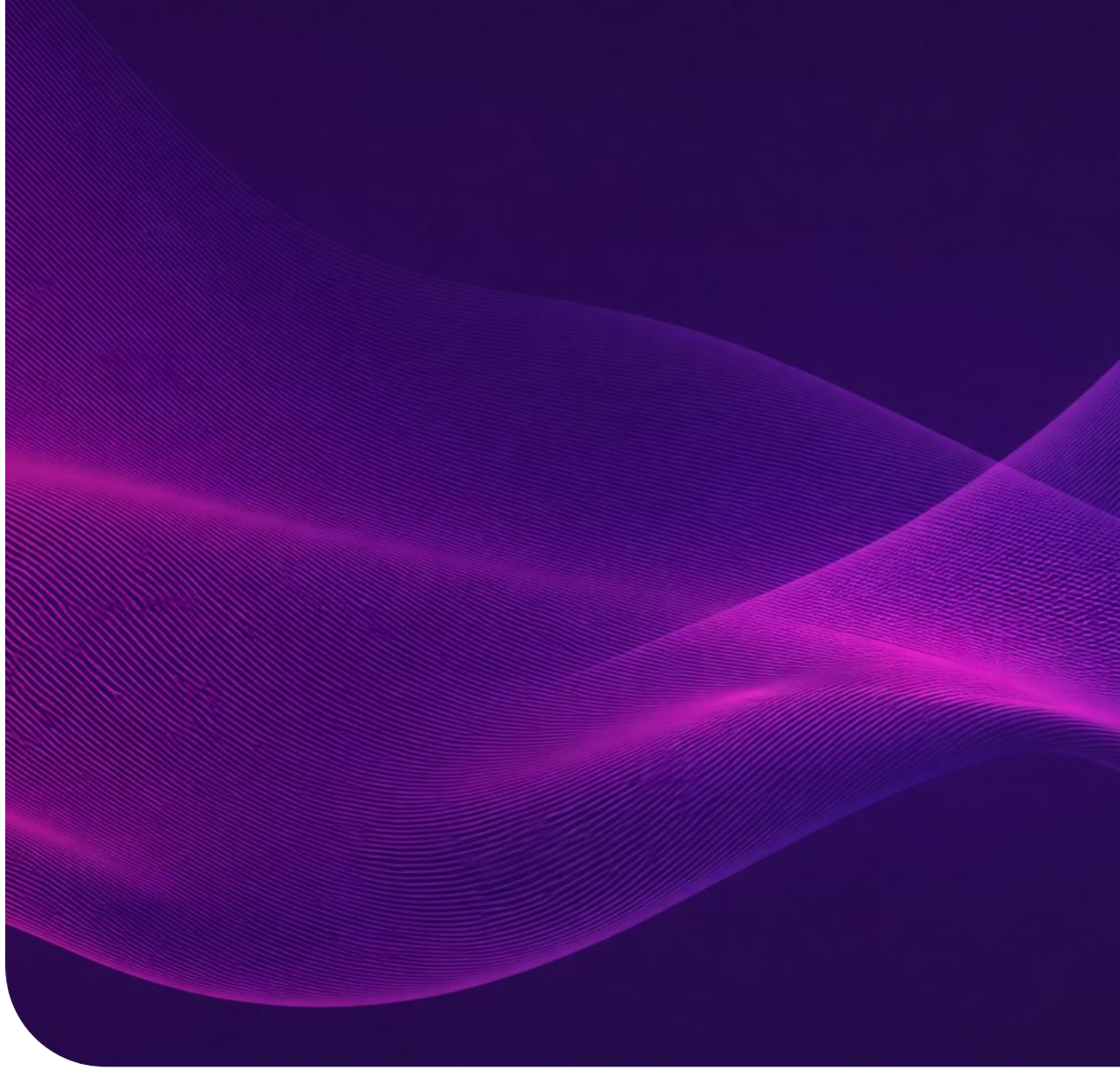
01 **Metrics**
Value & Unit Sales

02 **Channels**
Super / Hyper Markets

03 **Areas**
Greece Mainland, Crete & Islands

04 **Periods**
YR 2025 vs YR 2024

YTD September 2026 vs YTD September 2025



Circana.

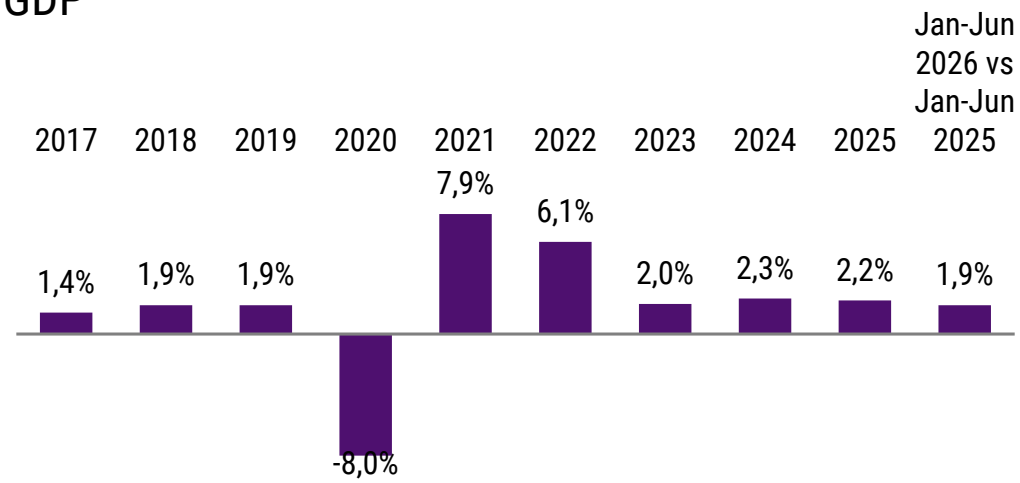
Greek Economy

01

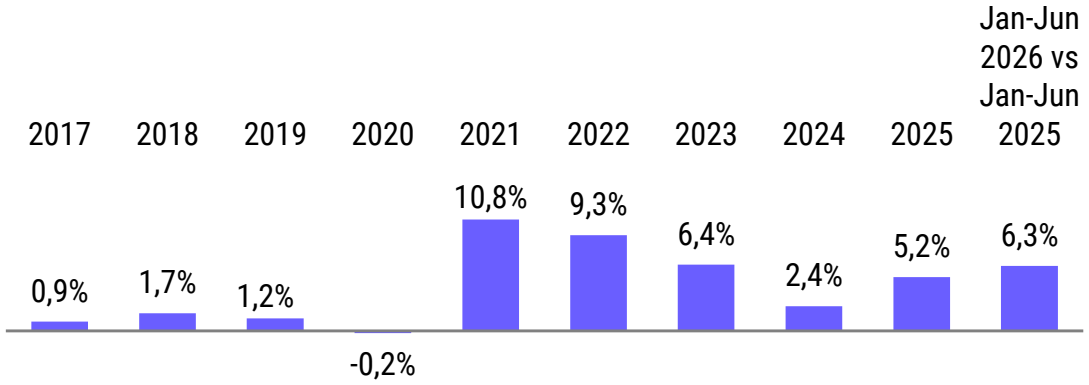
Market View

Greek Economy

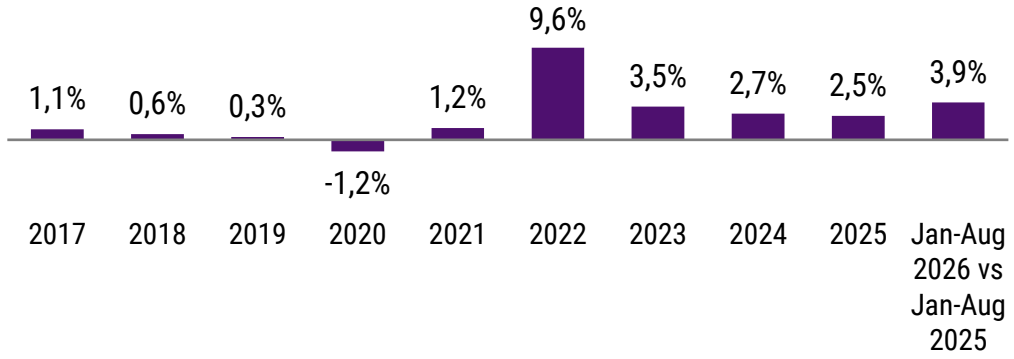
GDP



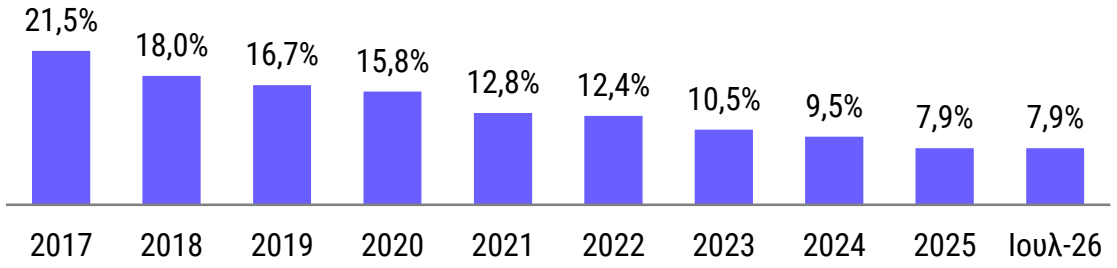
RETAIL TURNOVER INDEX (w.o AUTOMOTIVE FUEL)



INFLATION RATE TREND



UNEMPLOYMENT



Source: ELSTAT (latest available period/provisional data)

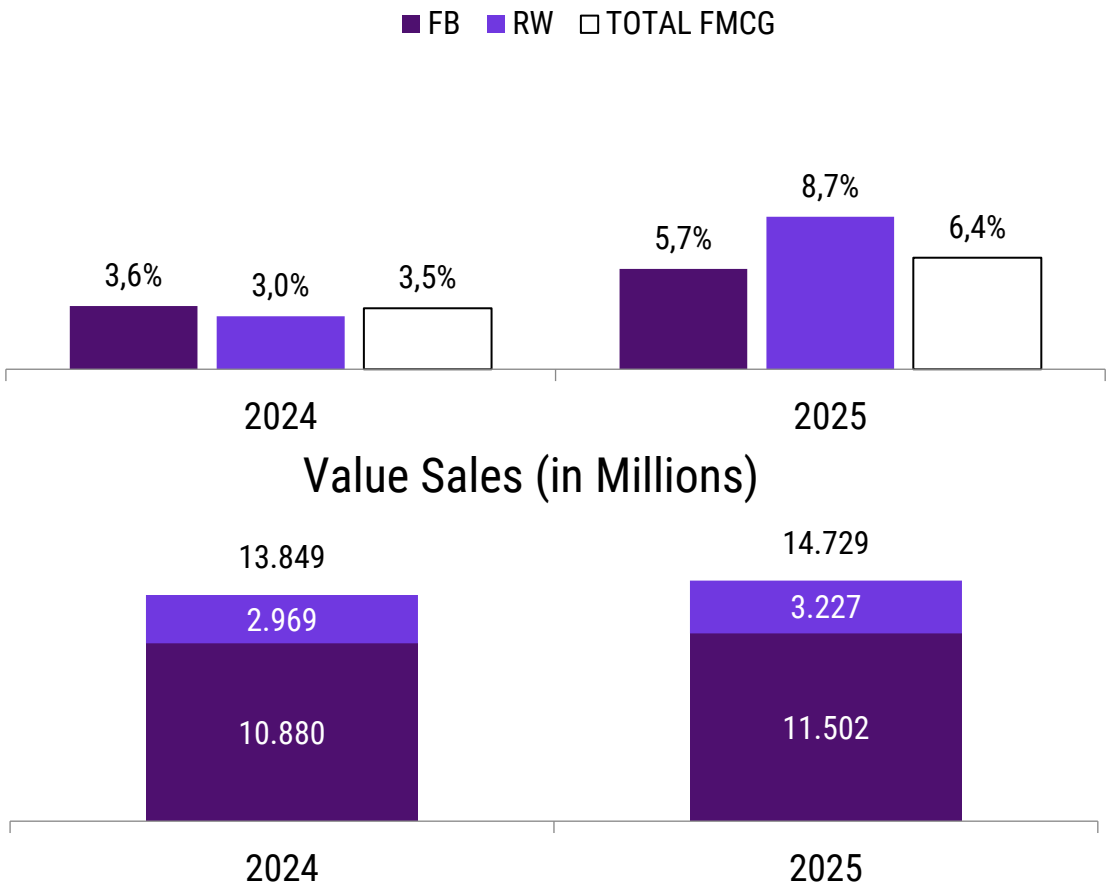
Trends for FMCG Market

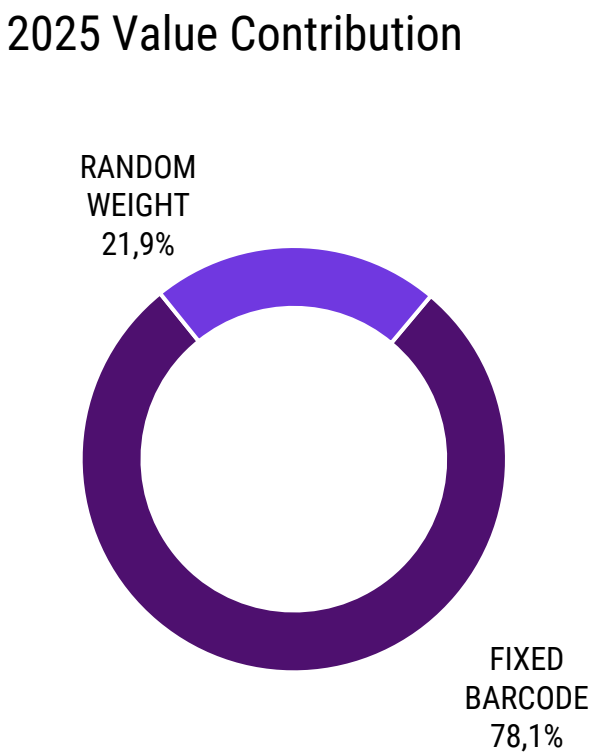
Fixed Barcodes & Random Weight

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)

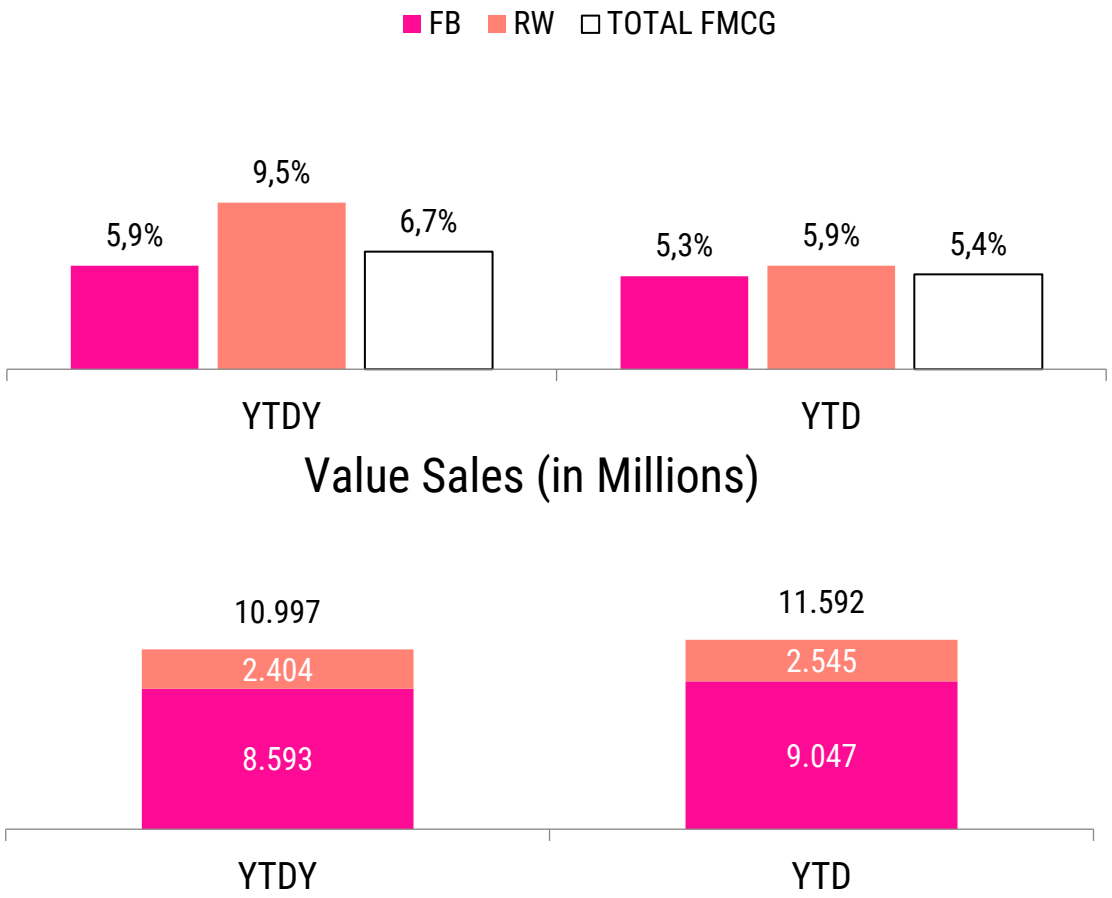


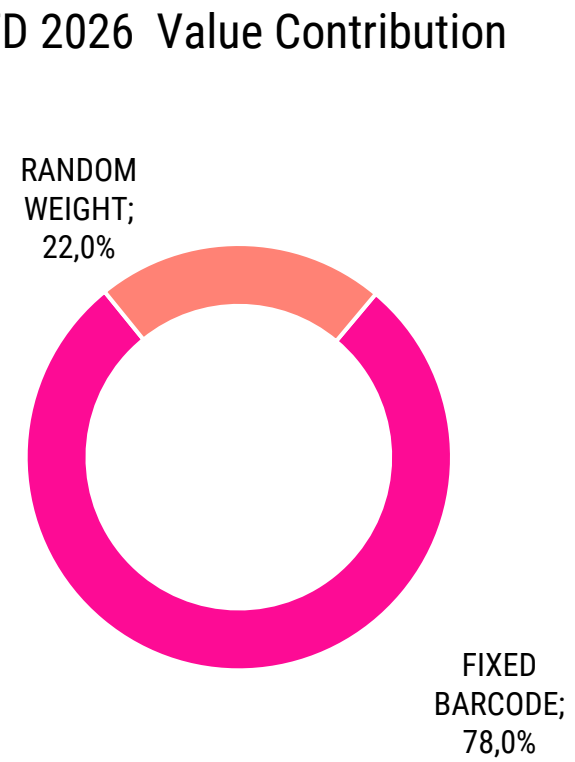


Source: Circana InfoScan, HM/SM + Random Weight, Year 2025

FMCG Value Sales Trend - YTD 2026

Increase for Total FMCG in YTD 26 (+5.4%) due to both Segments

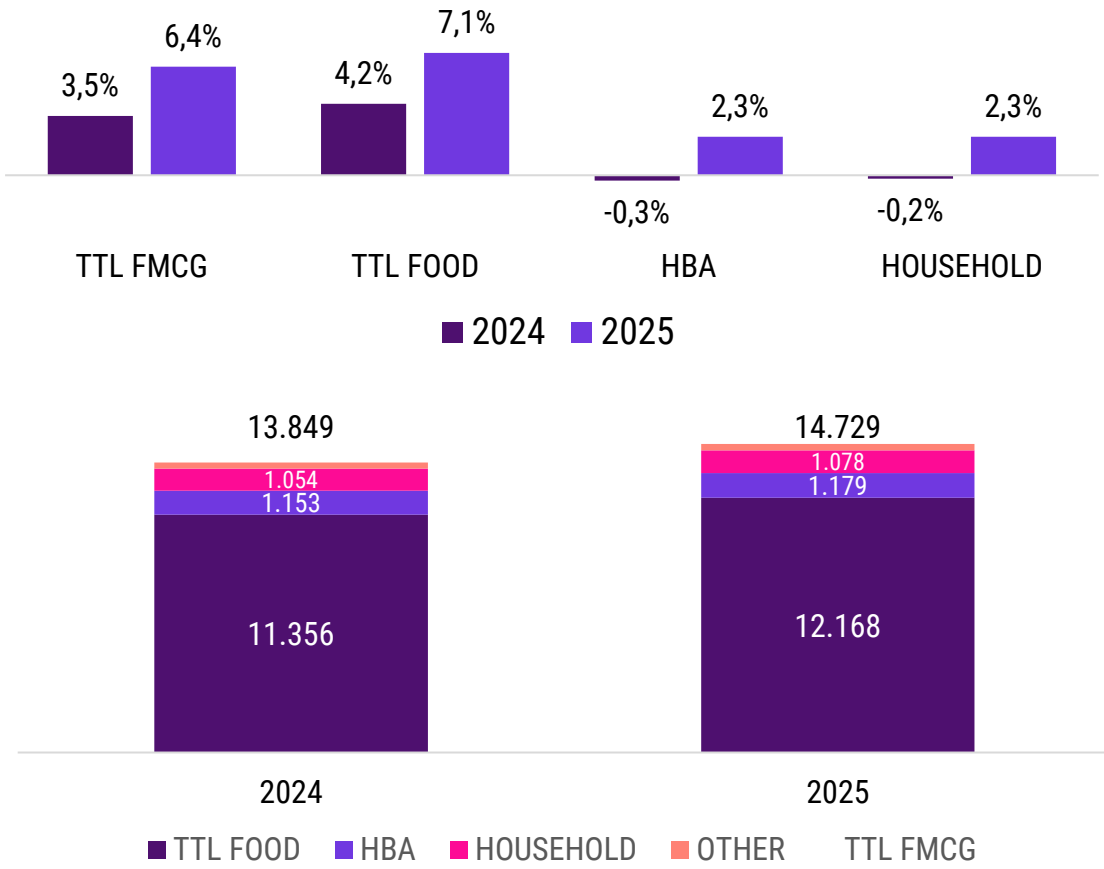


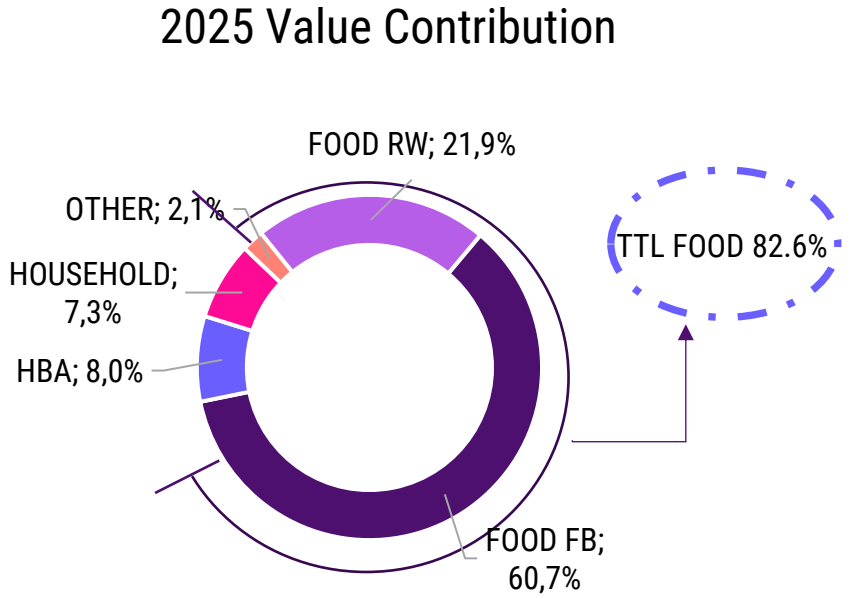


Source: Circana InfoScan, HM/SM + Random Weight, YTD September 2026

FMCG Value Sales Trend – Year 2025

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

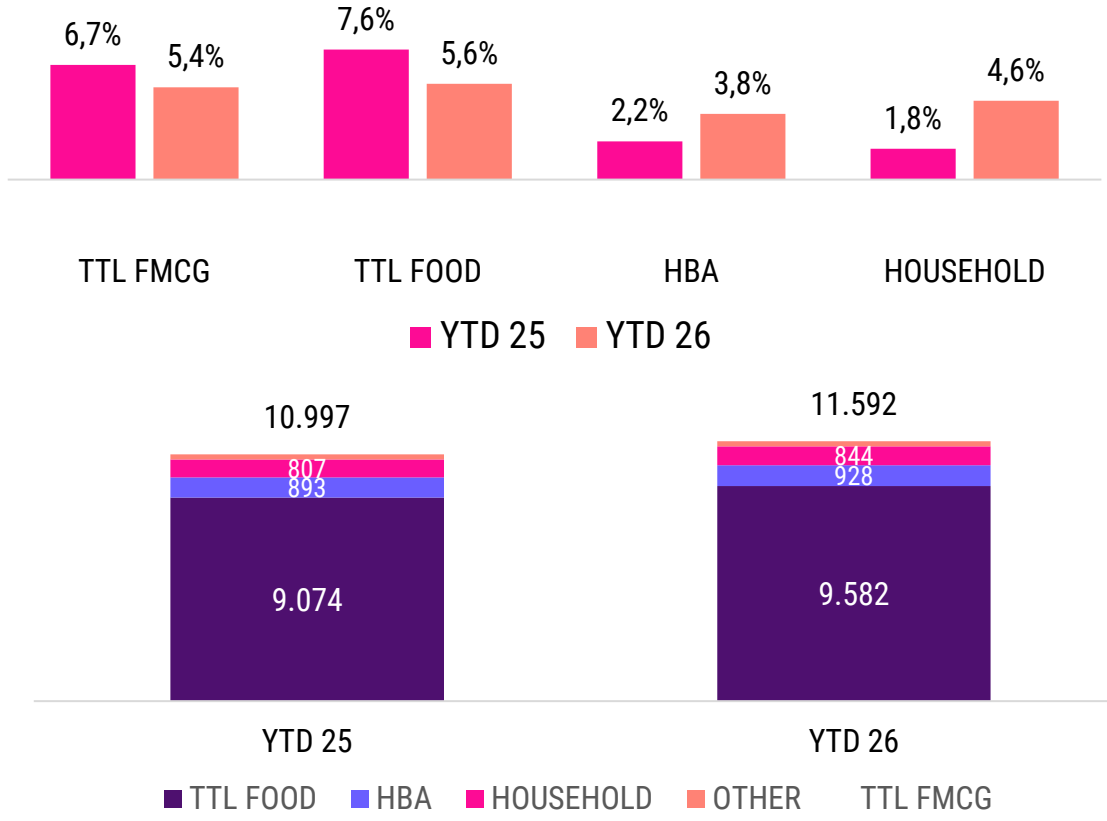




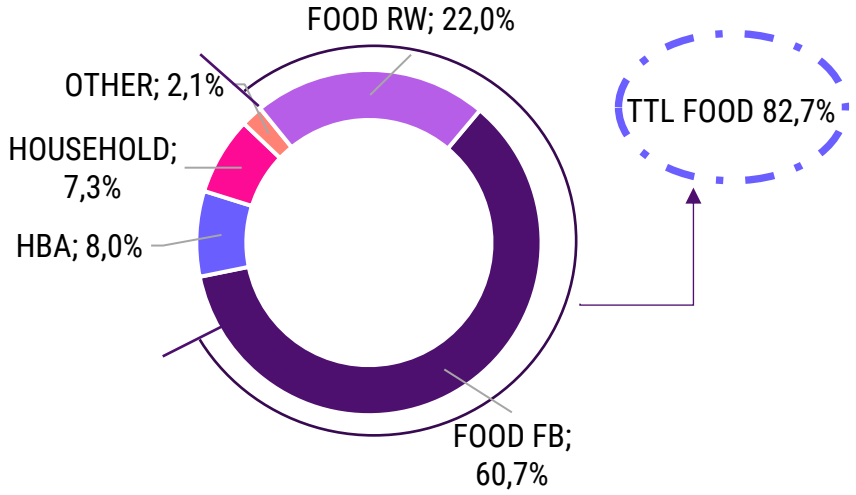
Source: Circana InfoScan, HM/SM + Random Weight, Year 2025

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



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

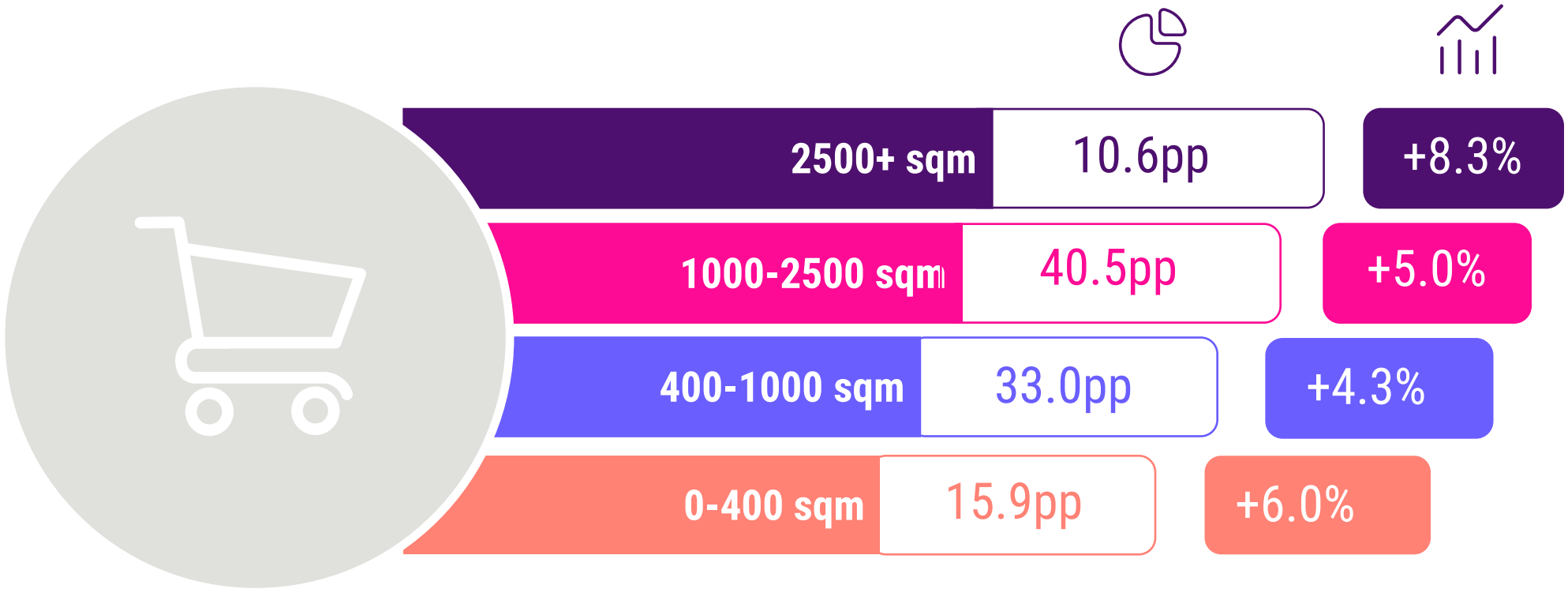
Trends for FMCG Market

Fixed Barcodes

03

FMCG Value Sales Trends per Store Type YTD

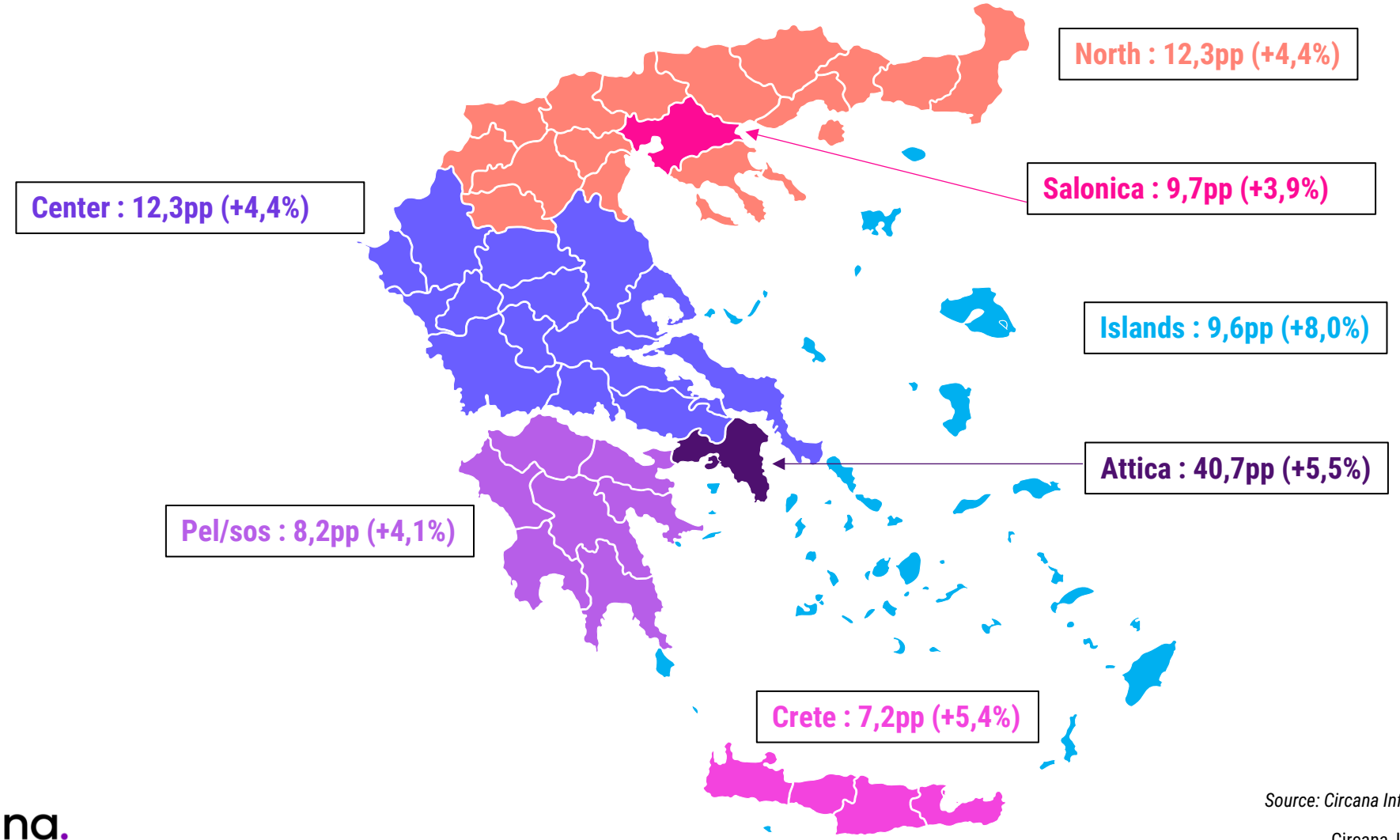
All Shop Types achieve growth during YTD 26, less intense for Medium SMs



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

FMCG Value Sales Trends per Geo

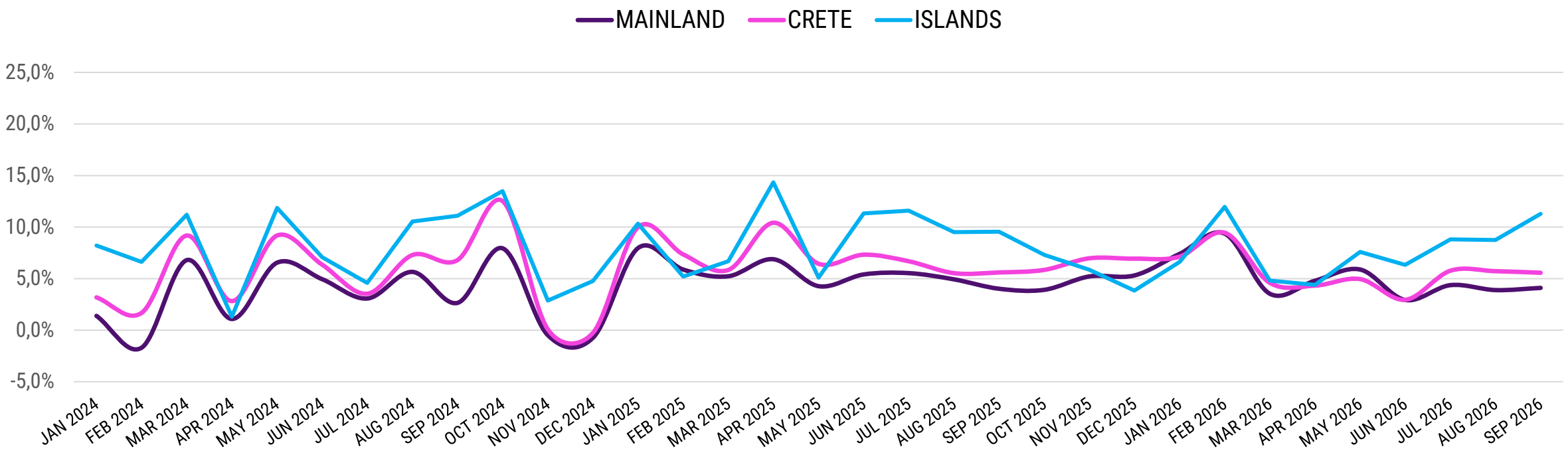
Islands achieve more intense growth for YTD 26



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

FMCG Monthly Value Growth

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

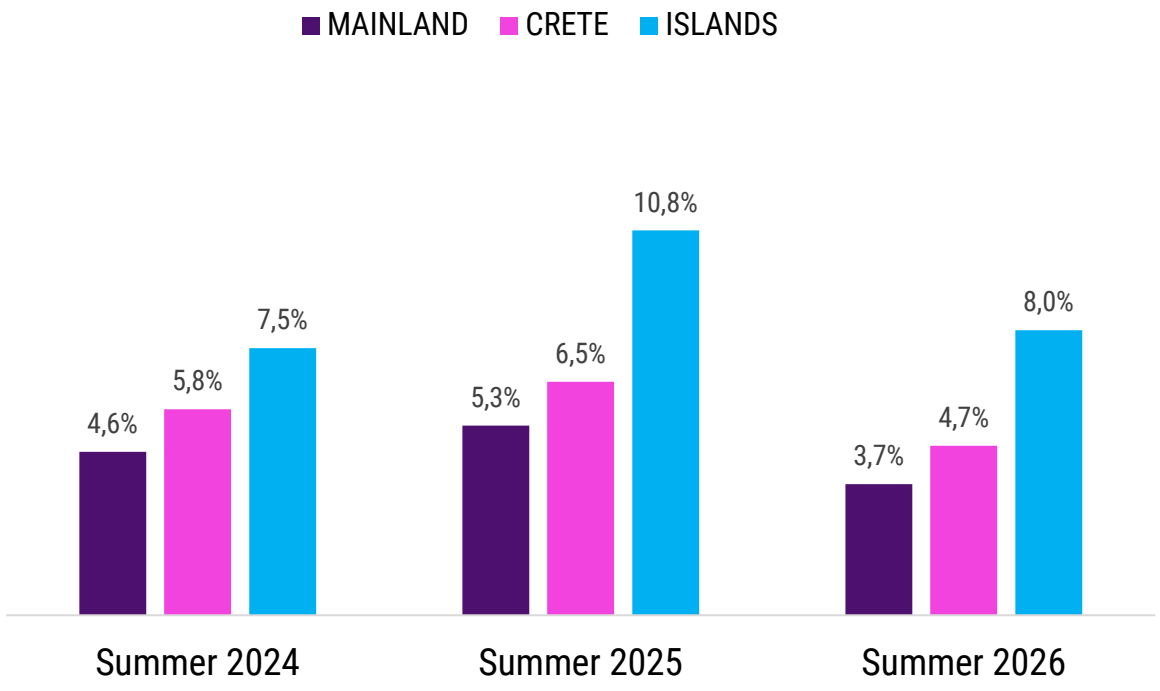


Source: Circana InfoScan, HM/SM, YTD September 26

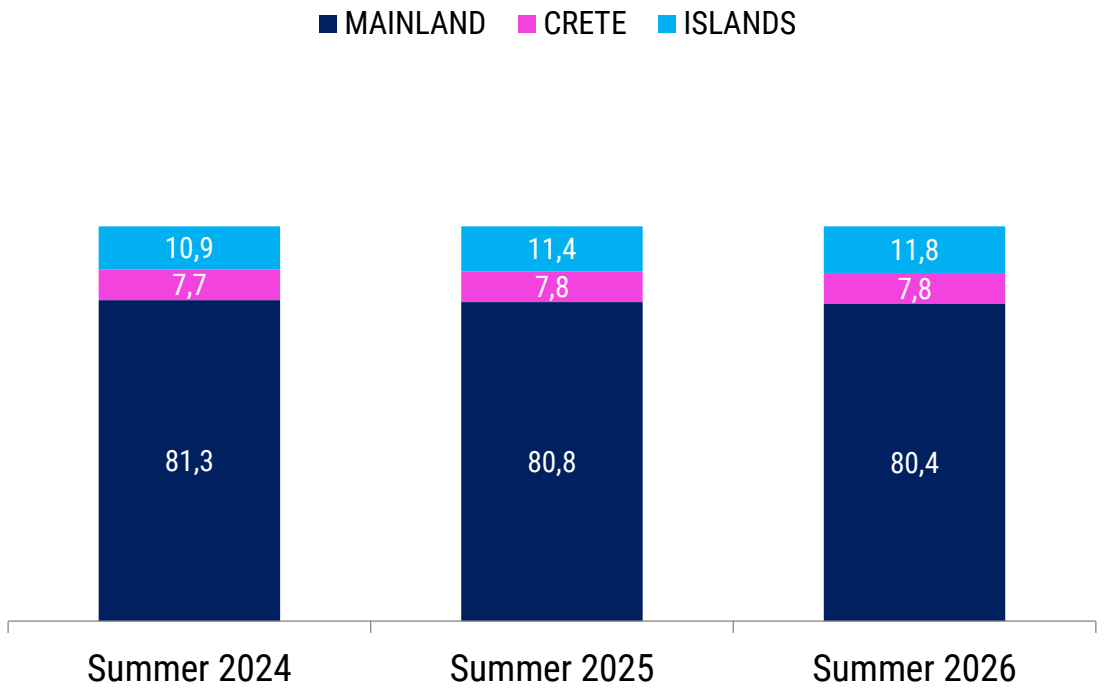
FMCG Value Growth during Summers

Intense growth during Summers for Islands

Value Growth



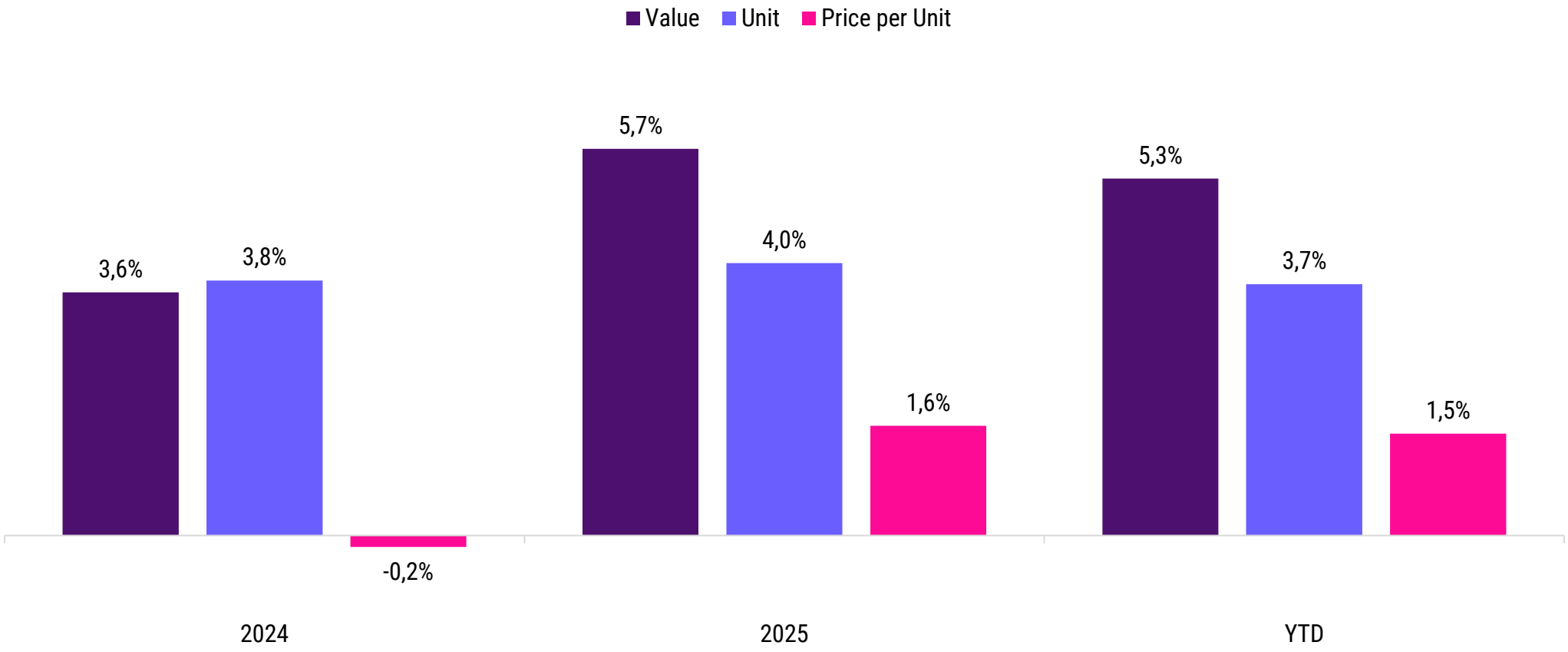
Value Contribution



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

FMCG Price Trends

More intense increase in Value during YTD 26

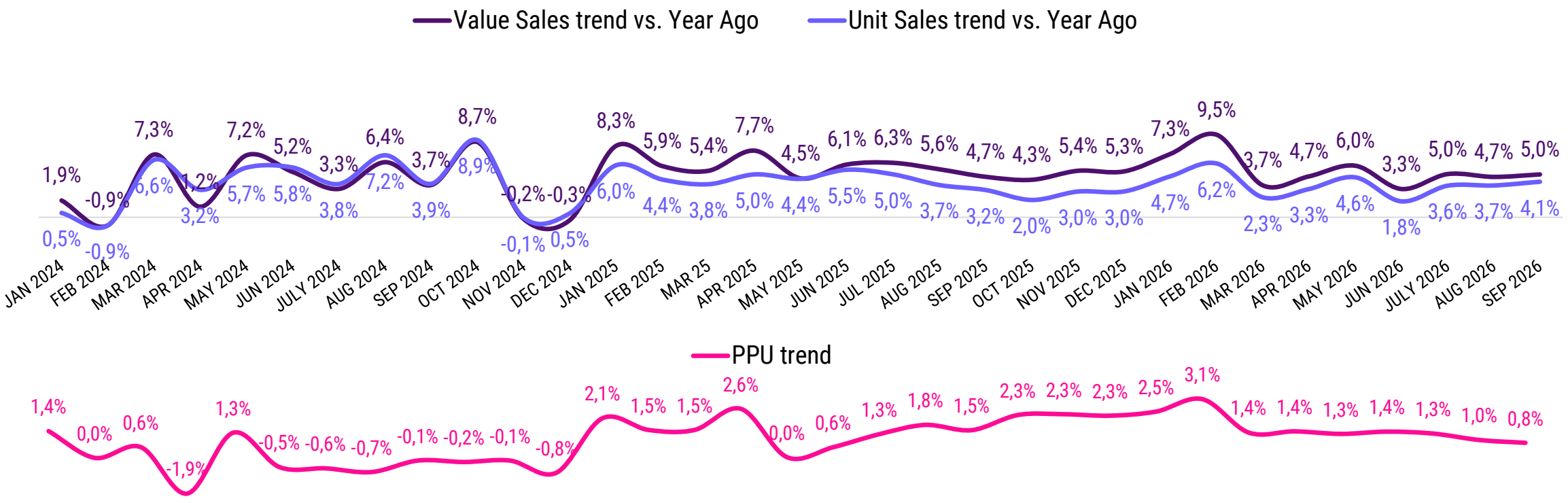


Source: Circana InfoScan, HM/SM , YTD September 26

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%



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

Evolution

Giga Categories

04

Giga Categories Value Sales Trend

Food manages the highest increase in YTD 26

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

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

Giga Categories Unit Sales Trend

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

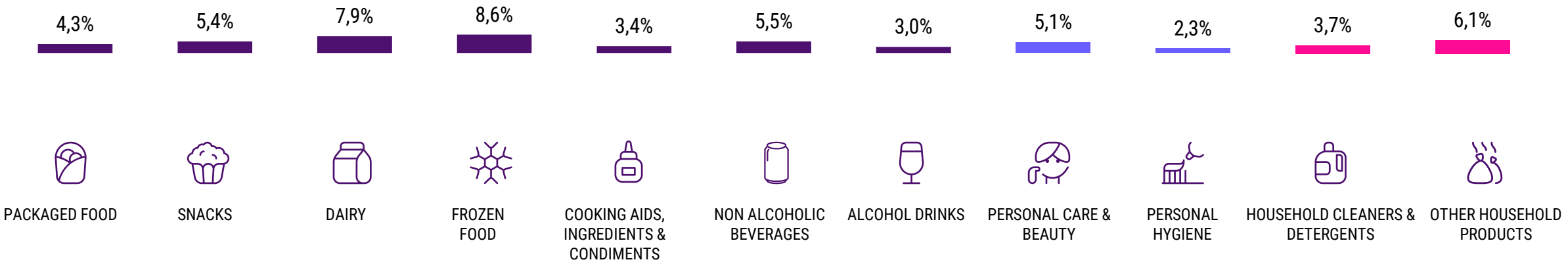
	YEAR 2025	YTD 2026
Food	+4,0	+3,6
Health & Beauty	+3,5	+3,9
Household	+2,9	+3,7

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

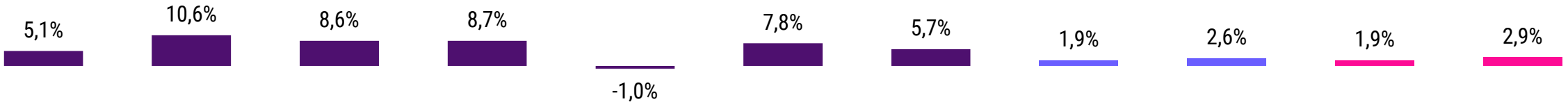
Categories Value Sales Trend YTD

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

Value Sales Trend YTD 2026



Value Sales Trend 2025

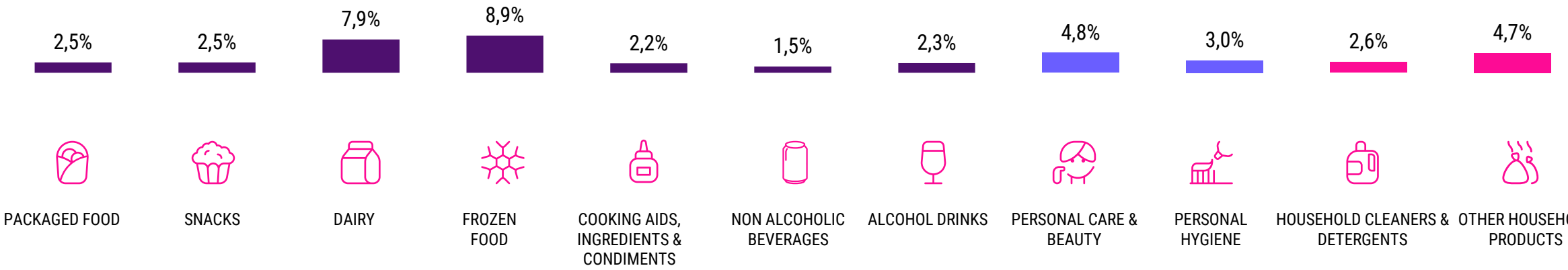


Source: Circana InfoScan, HM/SM , YTD September 26

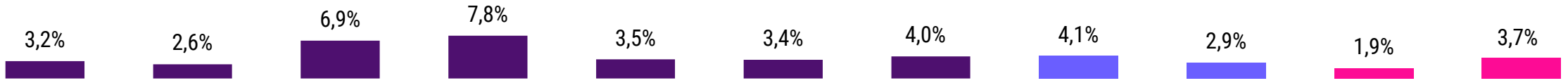
FMCG Unit Sales Trend YTD

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 September 26

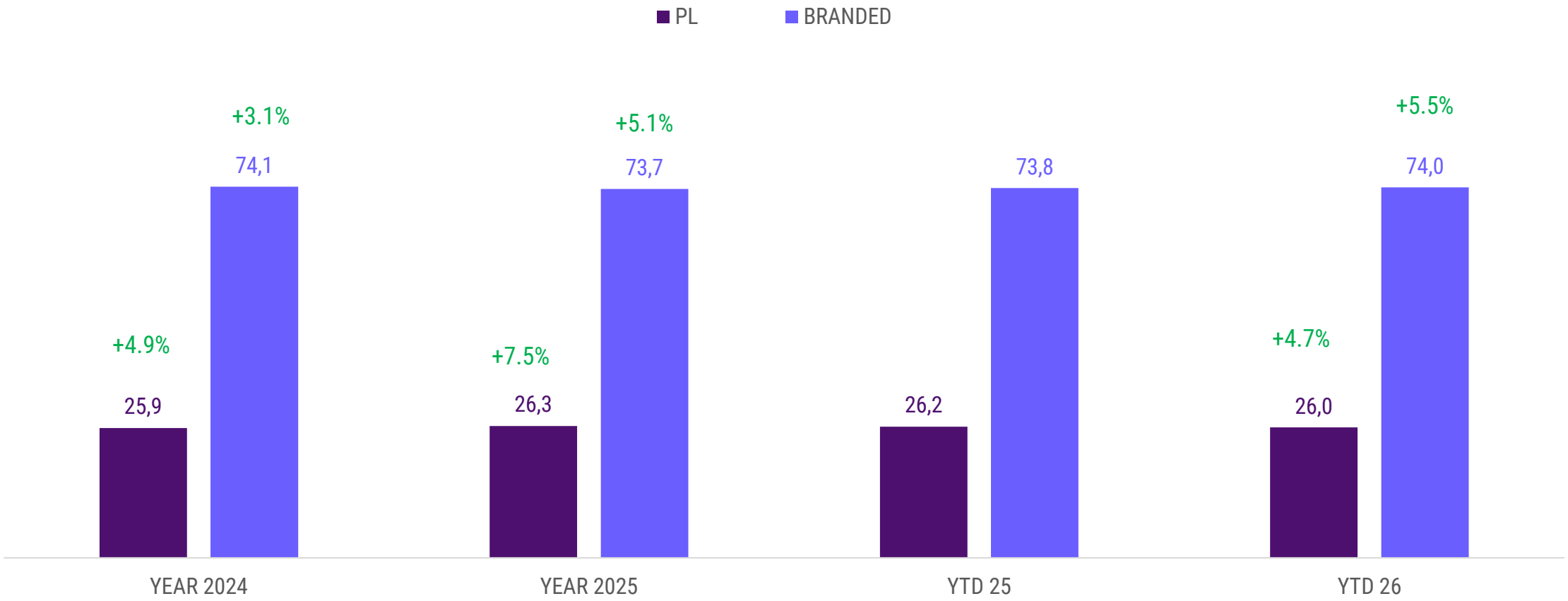
Evolution

Private Labels

05

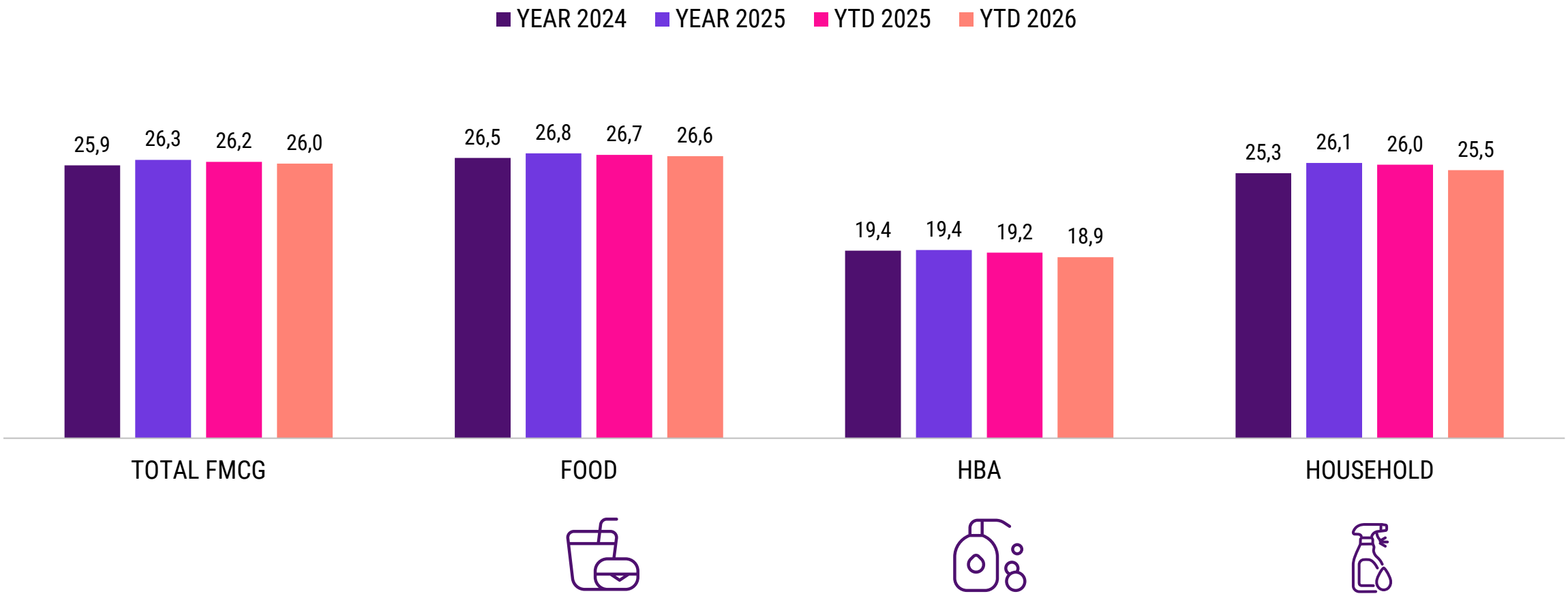
PL and Branded Value Shares and Trends

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



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

PL Value Share per Giga Category



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

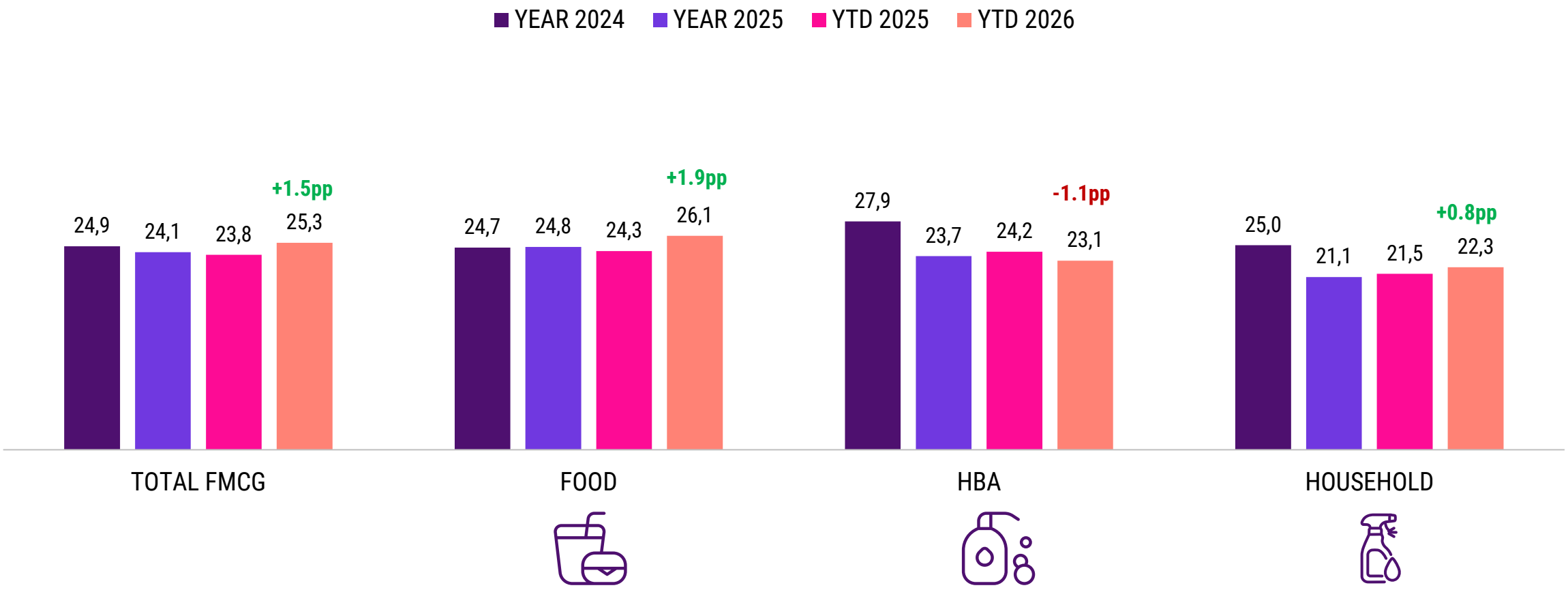
Price Trends

& Promotional Pressure

06

%Value Sales due to Temporary Price Reduction

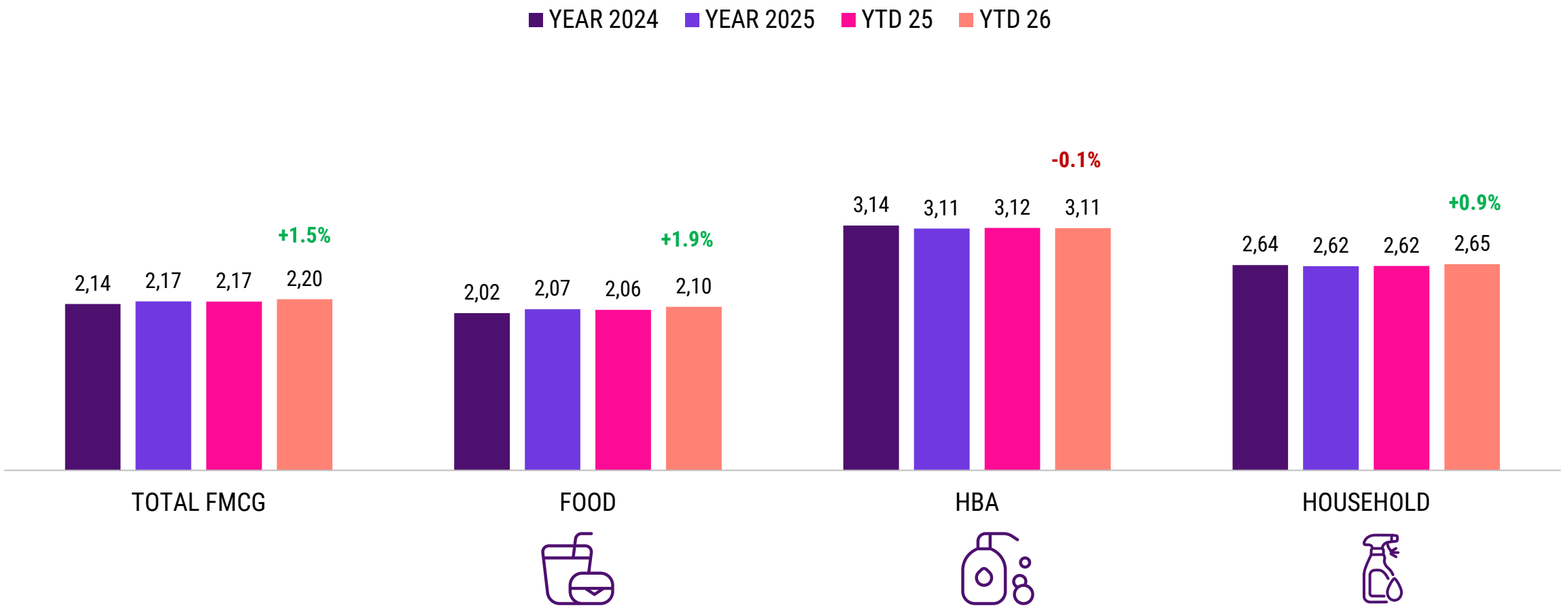
Increased promo intensity for Food in YTD 26



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

Price per Unit per Giga Category

Low Price increase, mainly due to Food

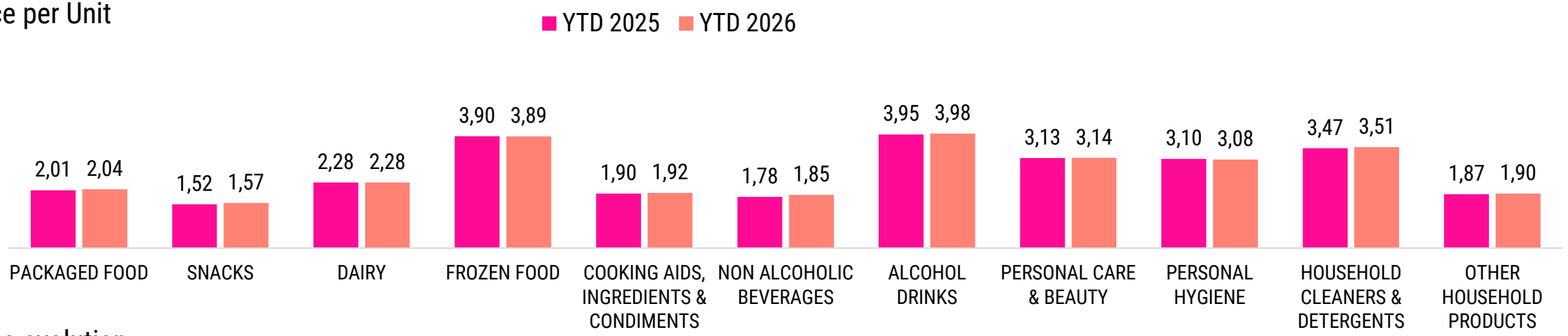


Source: Circana InfoScan, HM/SM , YTD September 26

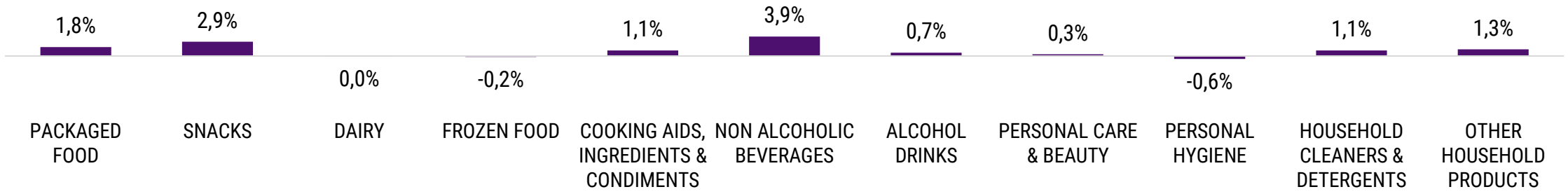
Price per Unit per Category

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

Price per Unit



Price evolution



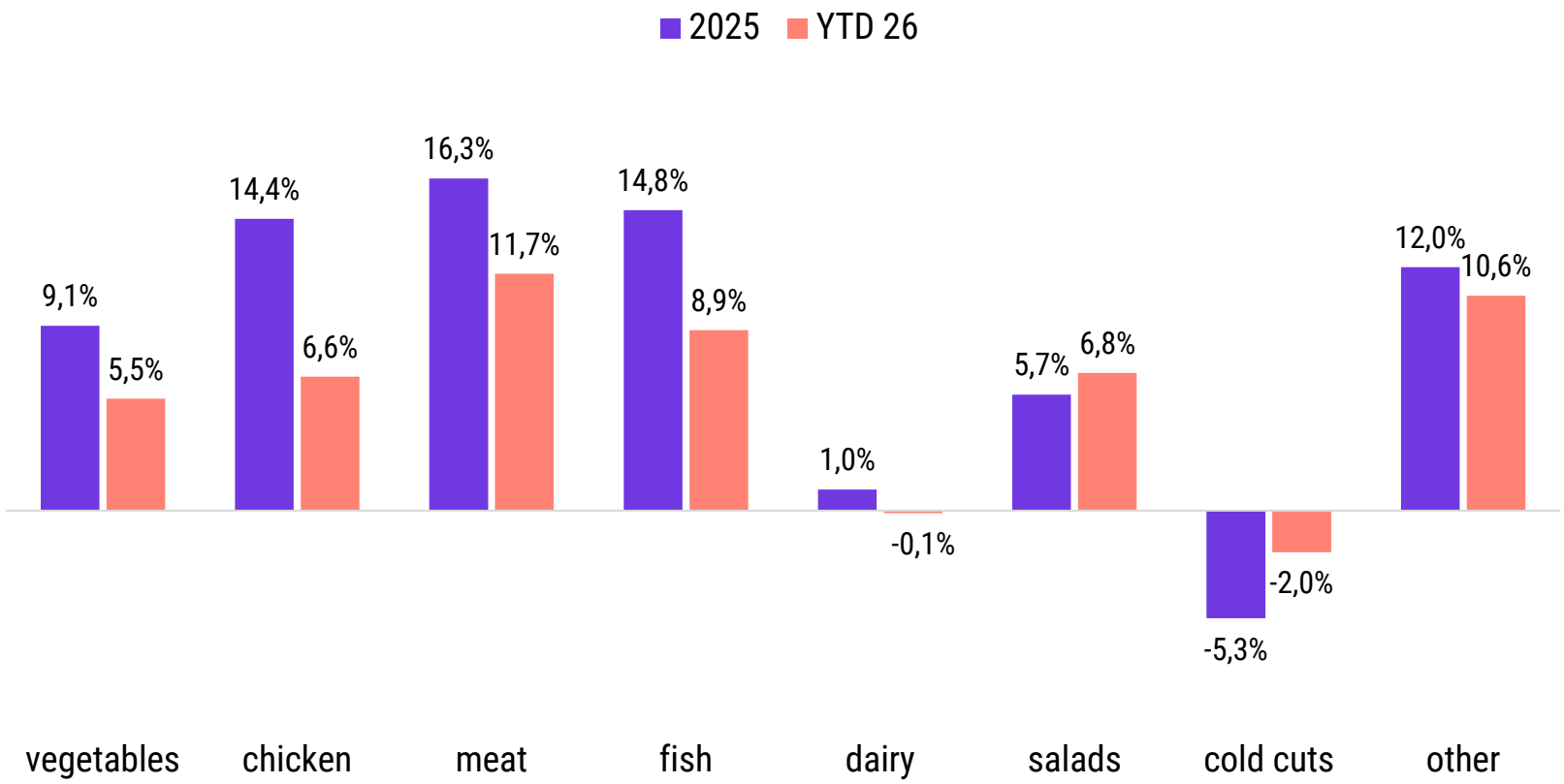
Source: Circana InfoScan, HM/SM , YTD September 26

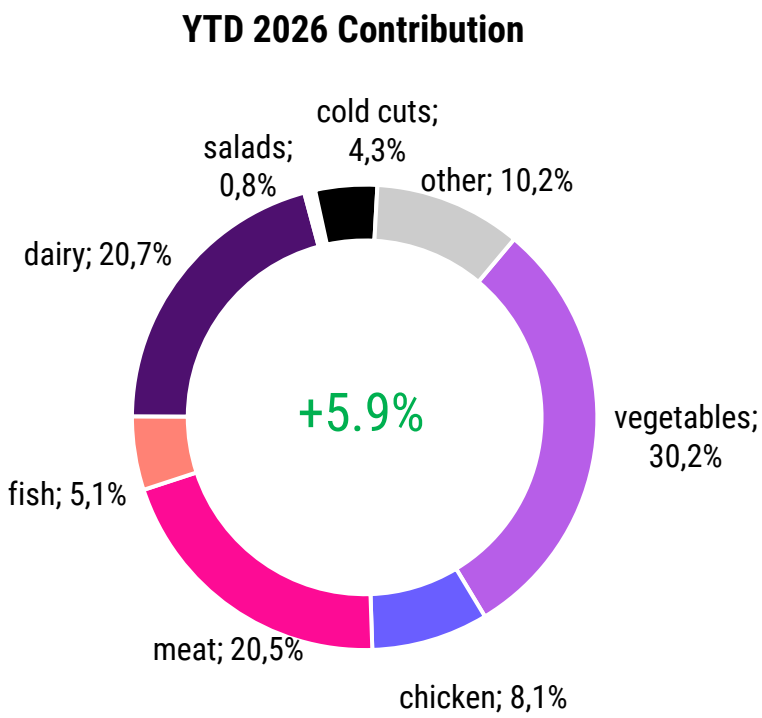
Random Weight

07

Value Sales Trend

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





Source: Circana Random Weight,, YTD September 26

Online Grocery

08

eRetail Audit Panel Turnover

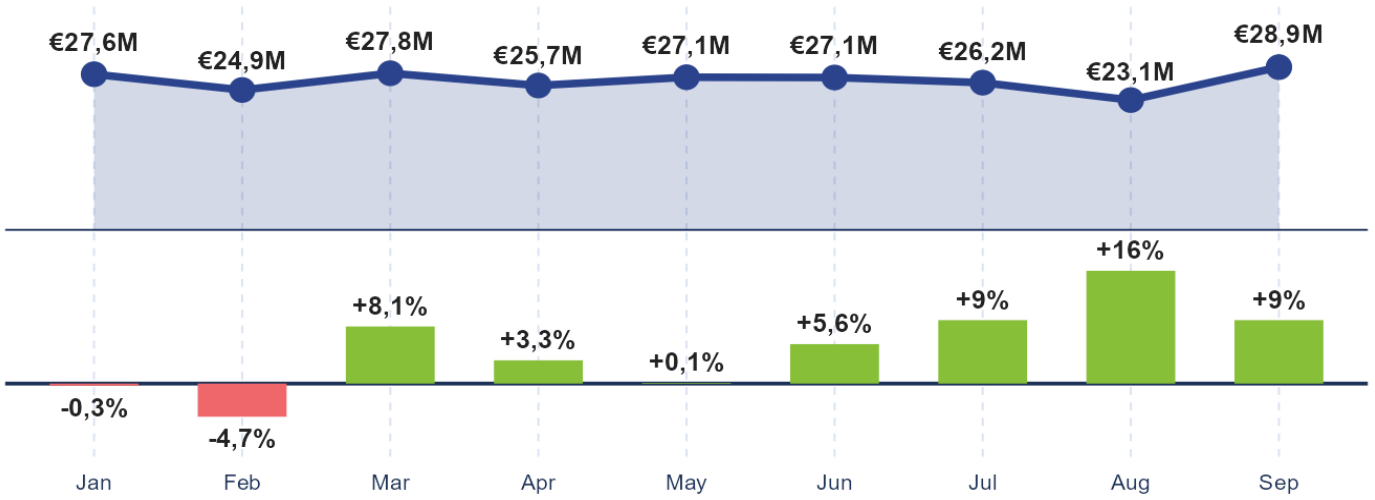
Sales Value incl. VAT

€238M

YoY Evolution

+5%

Monthly Sales Value & YoY Evolution



Sales Value Decomposition & Growth Drivers



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

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Mega Categories Overview

Fresh Food

Sales Value Weight

35% +1pp

YoY Evolution in Sales Value

+7%



Contribution to Growth

+2pp

Basic Packaged Food

Sales Value Weight

21% 0pp

YoY Evolution in Sales Value

+4%



Contribution to Growth

+1pp

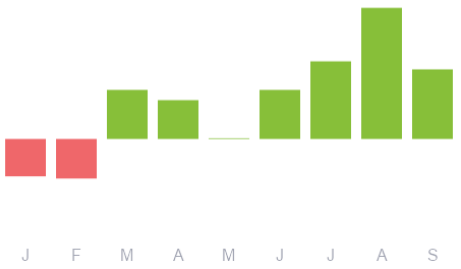
Cleaning Products & Paper for Household Use

Sales Value Weight

14% 0pp

YoY Evolution in Sales Value

+5%



Contribution to Growth

+1pp

Bottled Beverages, Soft Drinks, Water & Drink Mixes

Sales Value Weight

11% 0pp

YoY Evolution in Sales Value

+1%



Contribution to Growth

0pp

Frozen foods

Sales Value Weight

6% 0pp

YoY Evolution in Sales Value

+7%



Contribution to Growth

0pp

Based on data from eRetail Audit Panel.

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Mega Categories Overview

Beauty & Health

Sales Value Weight

6% 0pp

YoY Evolution in Sales Value

+6%



Contribution to Growth

0pp

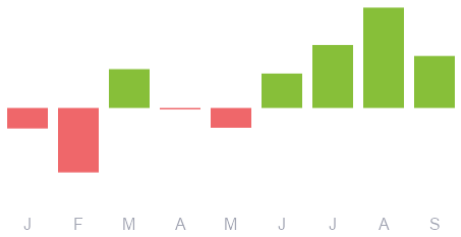
Bakery

Sales Value Weight

3% 0pp

YoY Evolution in Sales Value

+2%



Contribution to Growth

0pp

Baby & Kid

Sales Value Weight

3% 0pp

YoY Evolution in Sales Value

-6%



Contribution to Growth

0pp

Pet Supplies

Sales Value Weight

1% 0pp

YoY Evolution in Sales Value

+13%



Contribution to Growth

0pp

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Based on data from eRetail Audit Panel.

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Thank you.

Vangelis Foskolos
Retail Sales & Insights Director
vangelis.foskolos@circana.com
+30 6944610786

Orestis Thomaidis
Retail Group Account Manager
orestis.thomaidis@circana.com
+30 6980636792

Circana.