



Trends for the Greek FMCG environment

MARKET VIEW

April 2021

IRI Greece



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Study ID

Metrics

- Value and Units Sales Trends: Super/Hyper Markets FMCG
- Random Weight Value Sales Trends : Super/Hyper Markets

Channels

- Super/Hyper Markets

Areas

- Greece Mainland
- Crete

Periods

- YR 2020 vs YR 2019
- January - April 2021 vs January - April 2020

CHANNELS

DEFINITIONS

HYPERMARKET

Stores with large selling spaces (over 2500 sqm) and even broader range of products

SUPERMARKET

Self-service retail stores with a central check-out area and at least 2 cash registers, offering a large variety of groceries as well as consumer durables and goods



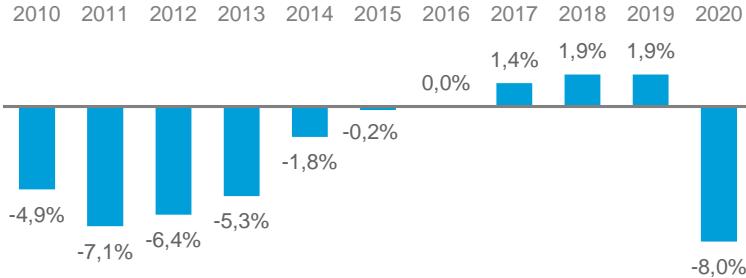


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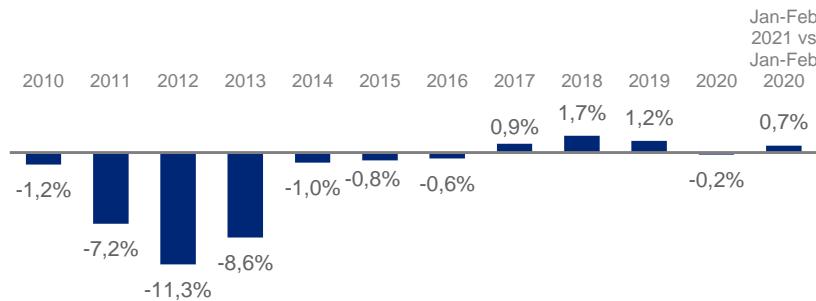
GREEK ECONOMY

Greek Economy

GDP



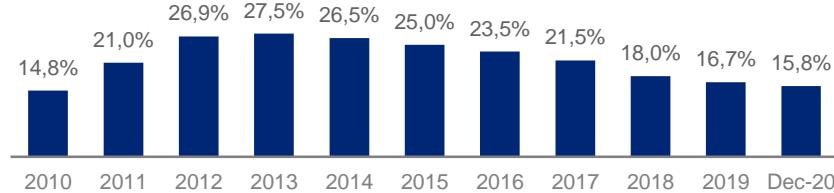
RETAIL TURNOVER INDEX (w.o AUTOMOTIVE FUEL)



INFLATION RATE TREND



UNEMPLOYMENT



Source: ELSTAT (latest available period/provisional data)

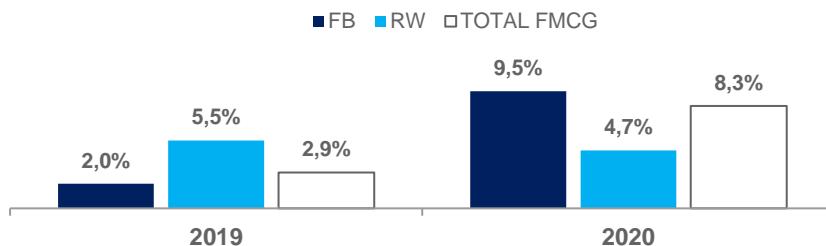
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TRENDS FOR THE FMCG MARKET

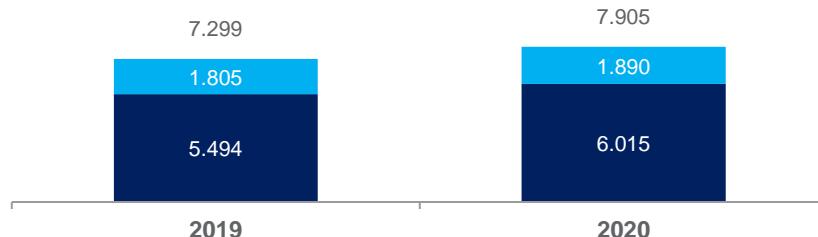


Growth 8.3% for Total FMCG Market in 2020, coming from both segments. More intense increase for Fixed Barcodes

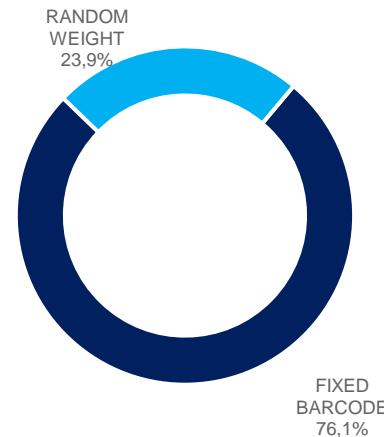
Value sales trend



Value Sales (in Millions)

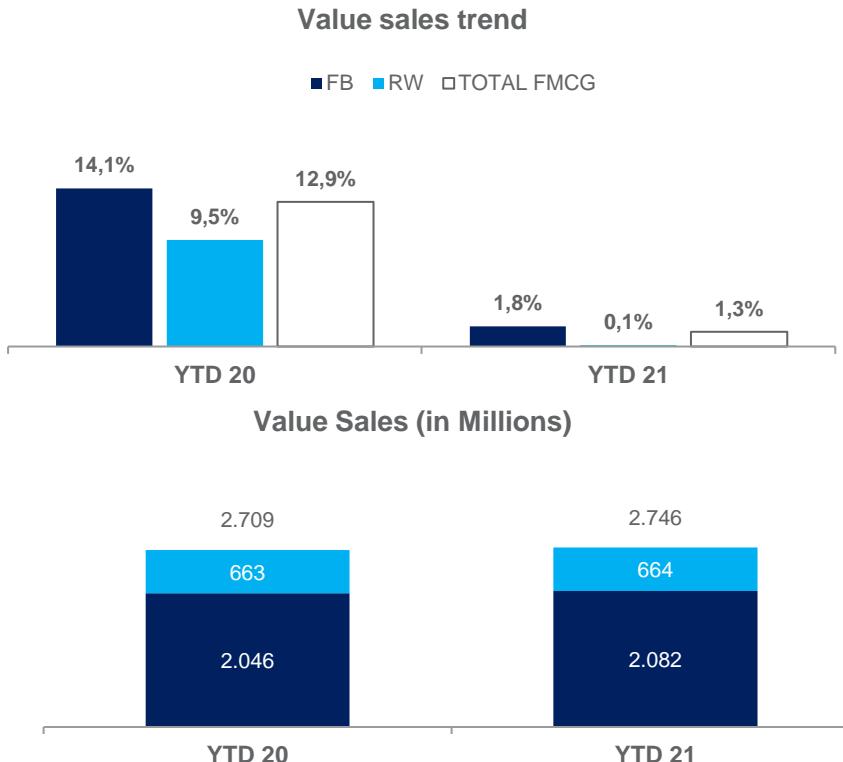


2020 Value Contribution

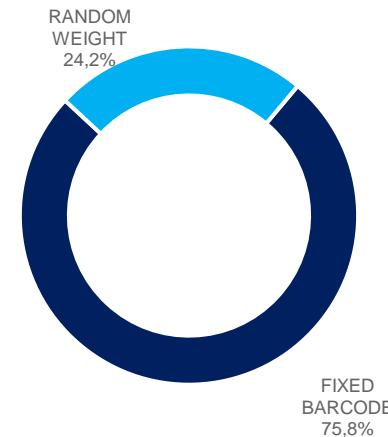


Source: IRI InfoScan, HM/SM + Random Weight, Year 2020

Growth 1.3% for Total FMCG Market in YTD due to fixed barcodes



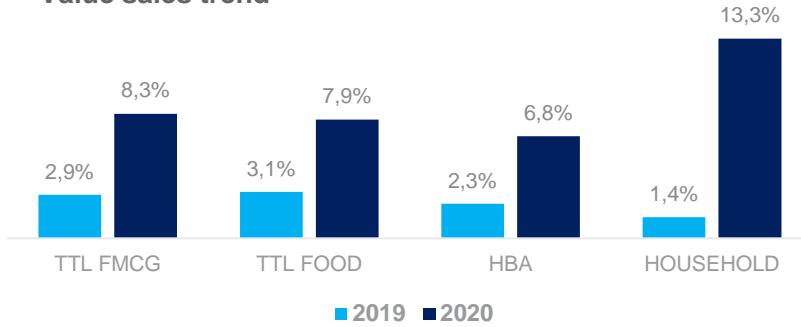
2021 Value Contribution



Source: IRI InfoScan, HM/SM + Random Weight, YTD April 21

Household is the Champion of 2020, due to Covid-19 existence

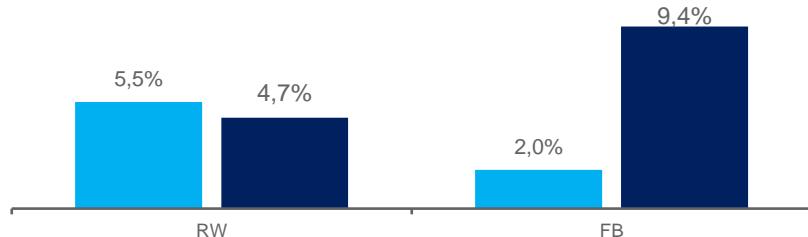
Value sales trend



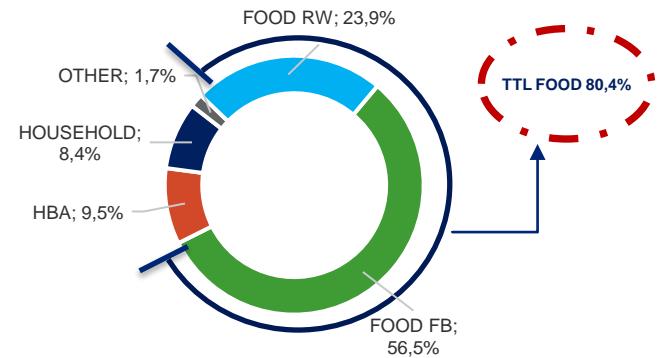
■ 2019 ■ 2020



Food sales trend



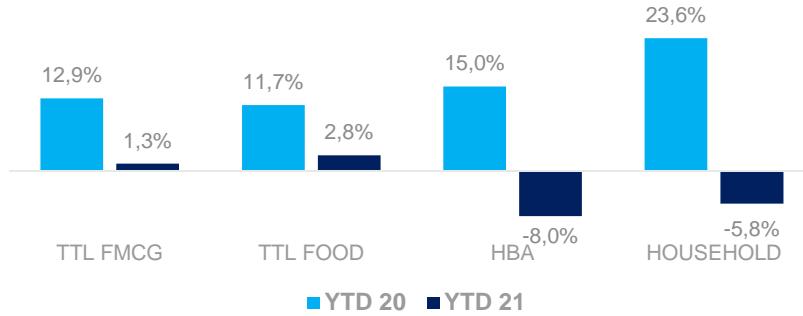
2020 Value Contribution



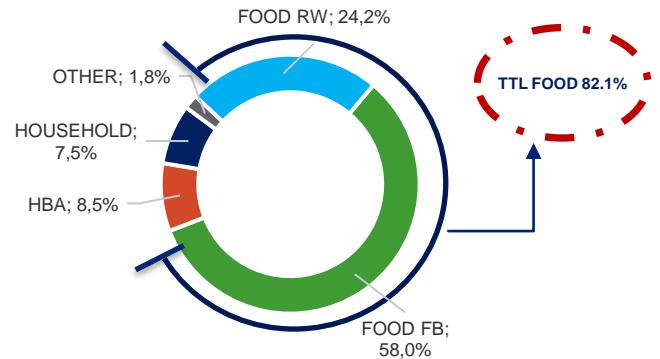
Source: IRI InfoScan, HM/SM + Random Weight, Year 2020

Food is the only category with increasing sales in YTD 21. Intense decline for HBA & Household

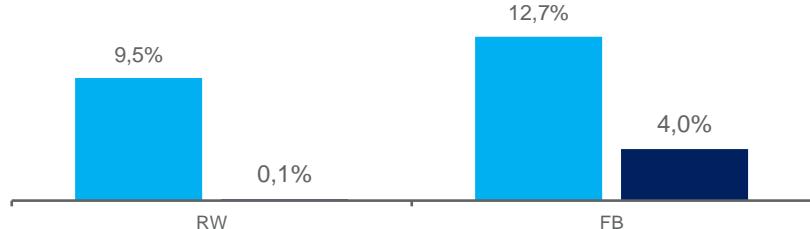
Value sales trend



YTD 2021 Value Contribution



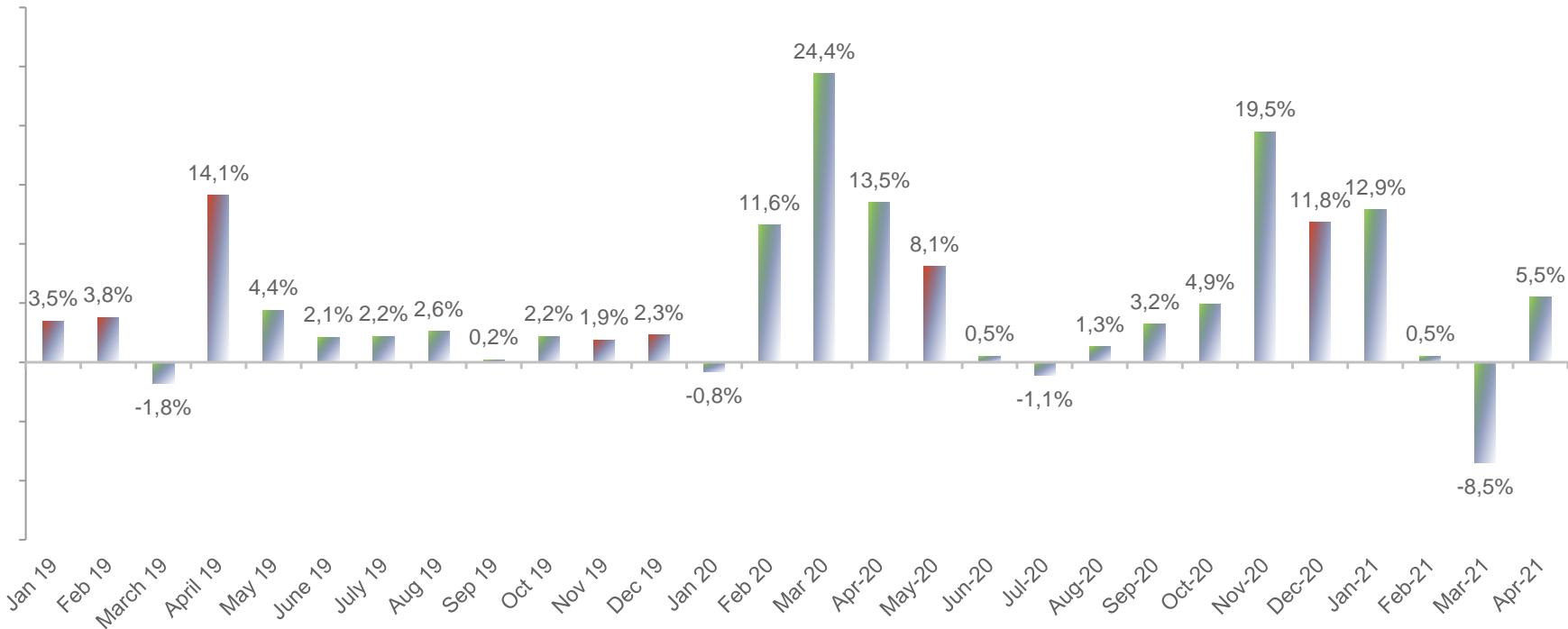
Food sales trend



Source: IRI InfoScan, HM/SM + Random Weight, YTD April 21

April value sales increased by 5.5%

Total FMCG Value sales trend by month



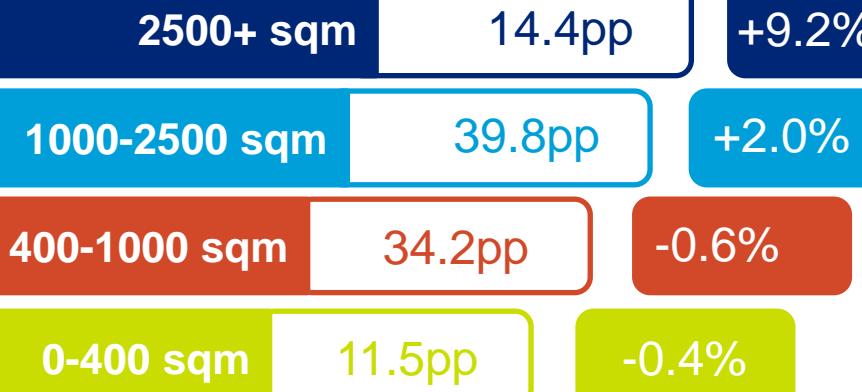
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RETAIL EXCLUDING RANDOM WEIGHT



Exceptional performance for Hyper Markets in YTD

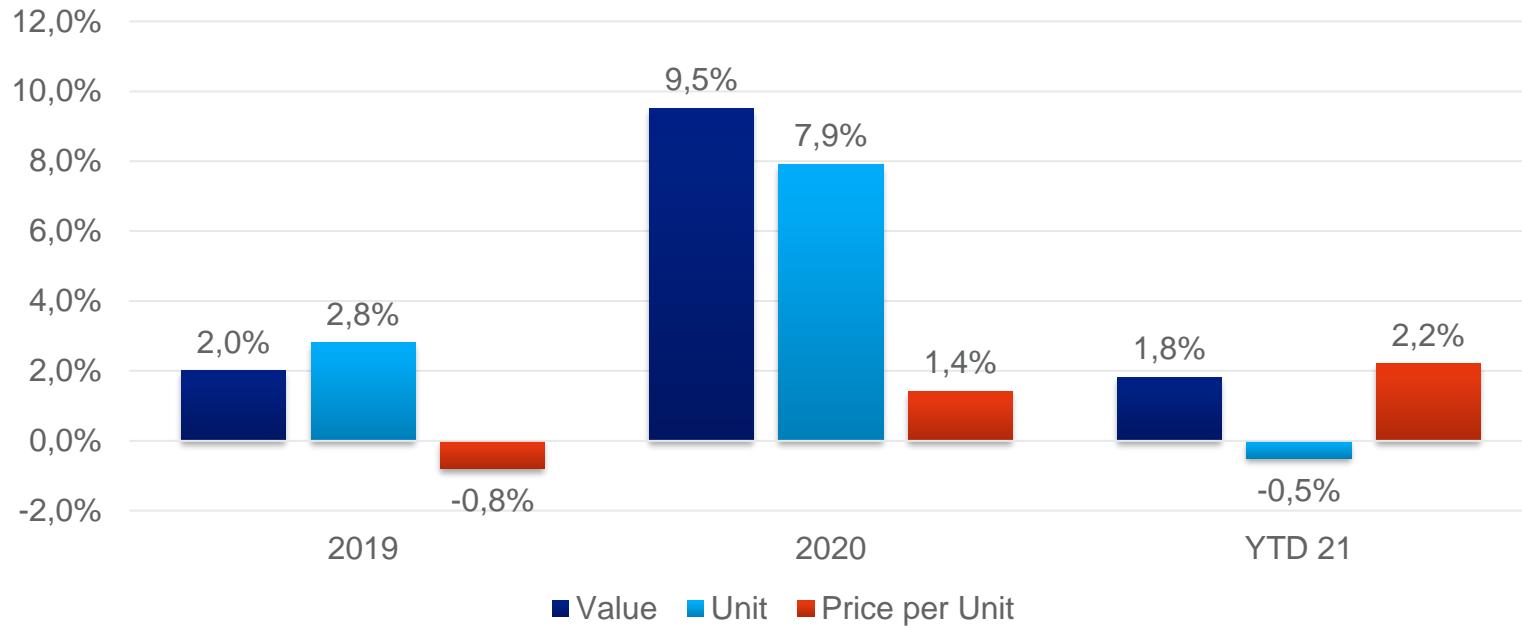
Value Contribution & Trends per shop type – YTD 21



Source: IRI InfoScan, HM/SM , YTD April 21

Increased prices in YTD by 2,2%

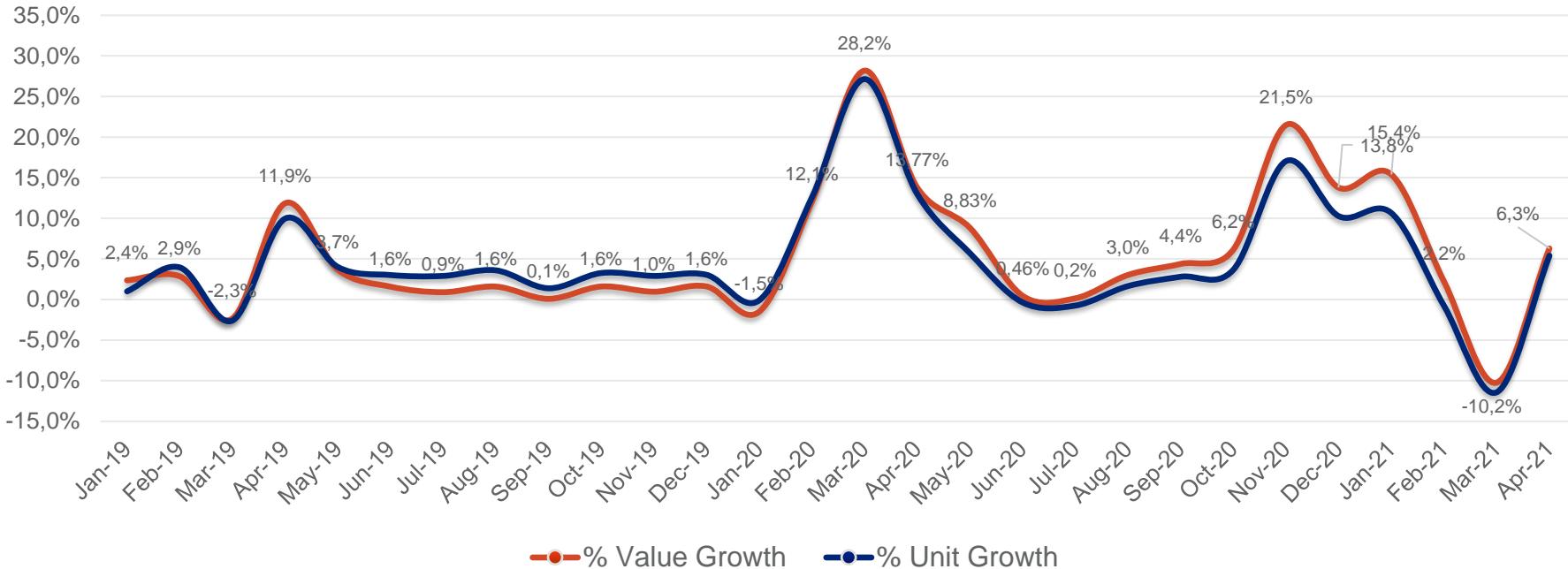
HM/SM Sales and Price Trend



Source: IRI InfoScan, HM/SM , YTD April 21

April value sales increased by 6.3%

HM/SM Value and Unit Trends per Month





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GIGA CATEGORIES EVOLUTION

Food is the only category with increasing sales in YTD 21. Intense decline for HBA & Household

HM/SM Value Sales Trend

YTD 21



Food



Health & Beauty



Household

2020



Food



Health & Beauty



Household

Source: IRI InfoScan, HM/SM , YTD April 21

Same case in terms of unit sales but with lower increase for Food

HM/SM Unit Sales Trend

YTD 21



Food



Health & Beauty



Household

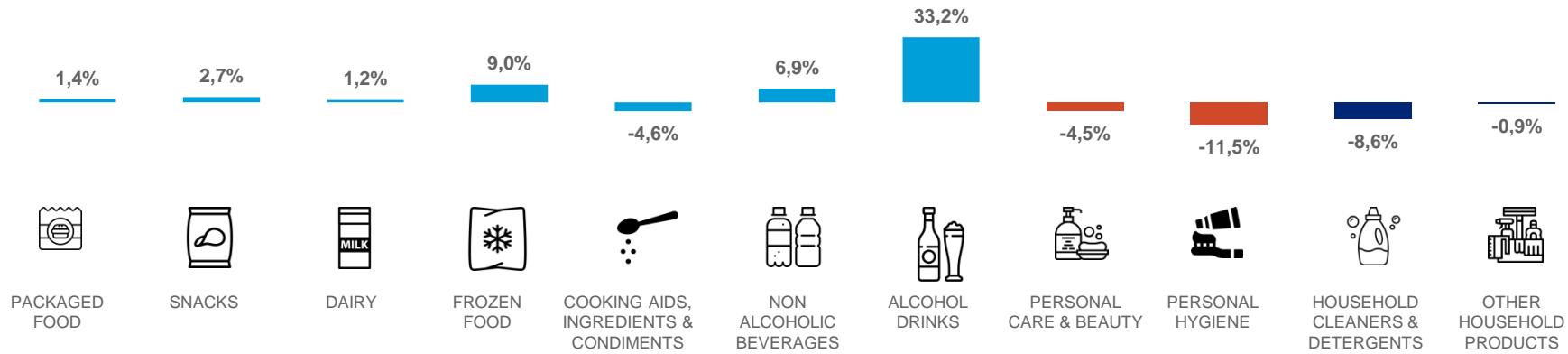
2020



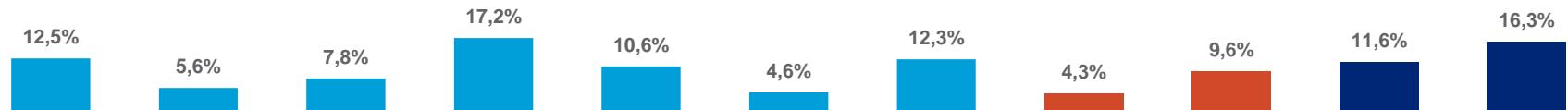
Source: IRI InfoScan, HM/SM , YTD April 21

Alcohol Drinks is the category with the most intense increase in YTD

HM/SM Value Sales Trend YTD 21



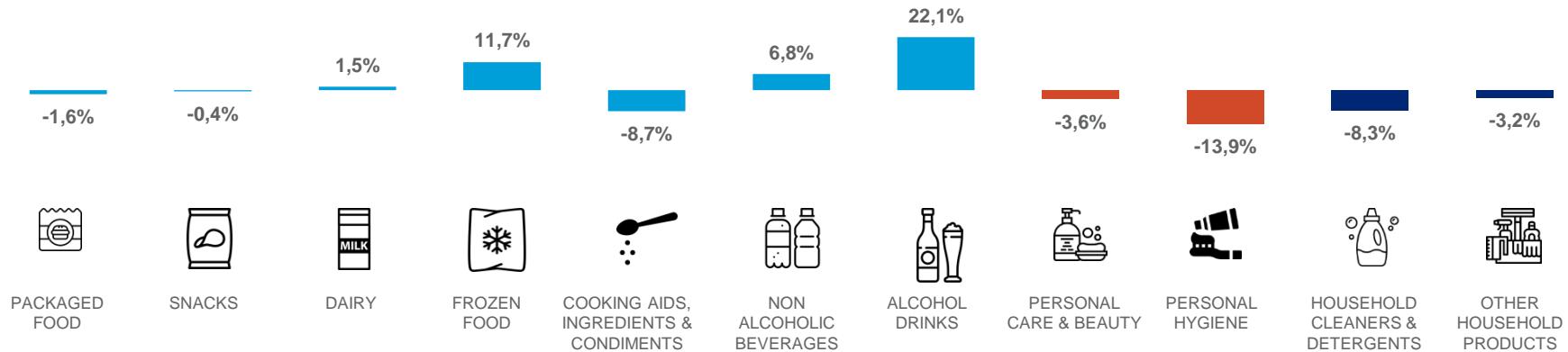
HM/SM Value Sales Trend 2020



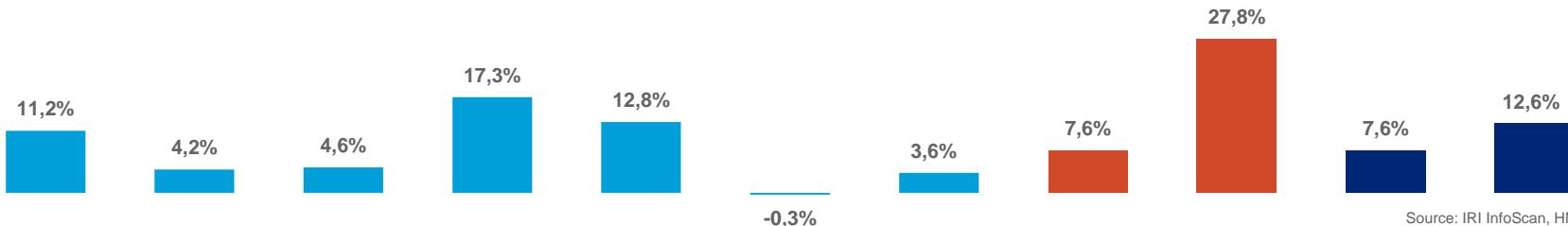
Source: IRI InfoScan, HM/SM , YTD April 21

Same picture in terms of Units

HM/SM Unit Sales Trend YTD 21



HM/SM Unit Sales Trend 2020



Source: IRI InfoScan, HM/SM , YTD April 21

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EVOLUTION OF PRIVATE LABELS



PL are declining during YTD

PL Value Share and Trends in HM/SM

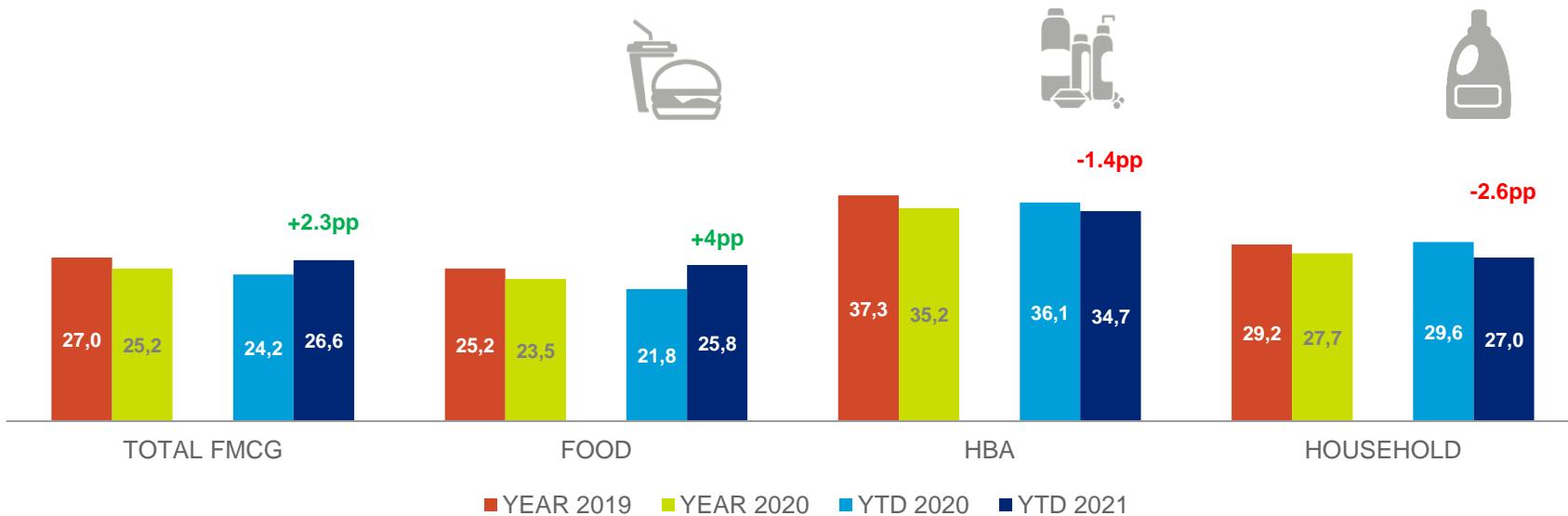


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PRICE TRENDS – PROMO PRESSURE DUE TO TPR

Increased promo intensity for Total FMCG in YTD coming from Food categories

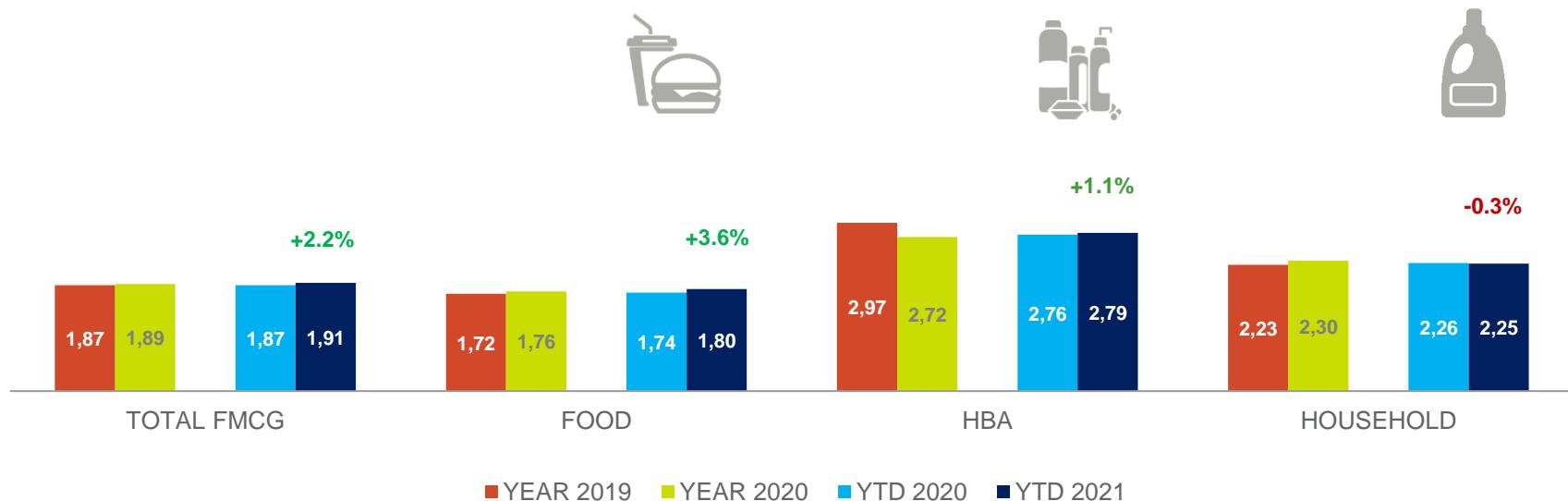
%Value Sales due to Temporary Price Reduction



Source: IRI InfoScan, HM/SM , YTD April 21

Increased prices for Food and HBA in YTD 21 affected total FMCG prices

Price per Unit per Giga Category



Source: IRI InfoScan, HM/SM , YTD April 21

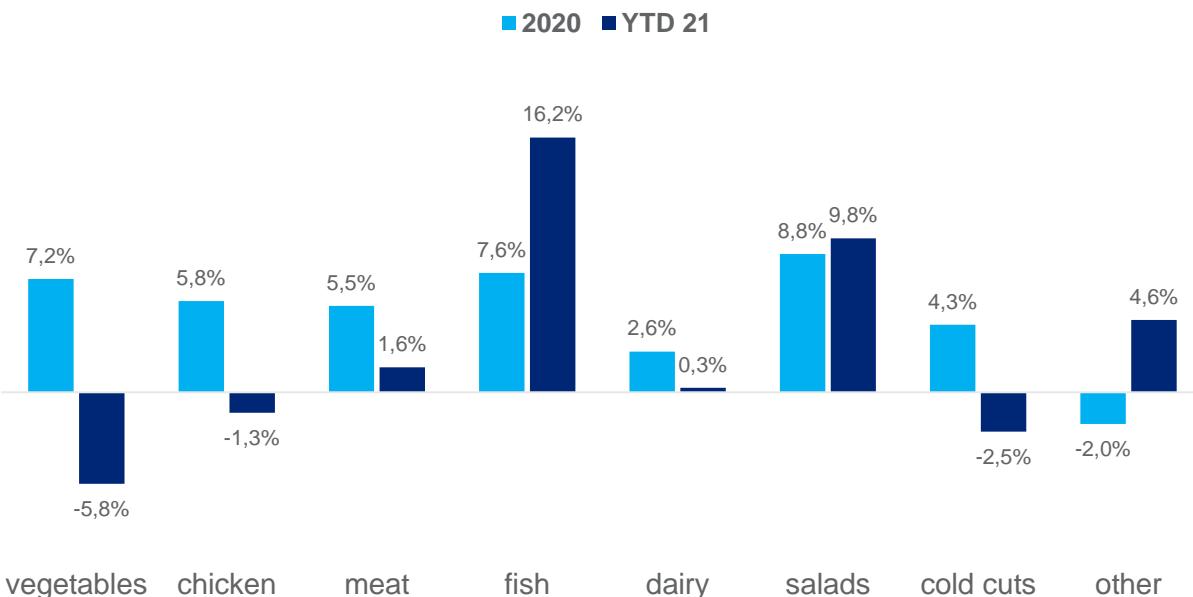
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RANDOM WEIGHT CATEGORIES CONTRIBUTION & GROWTH

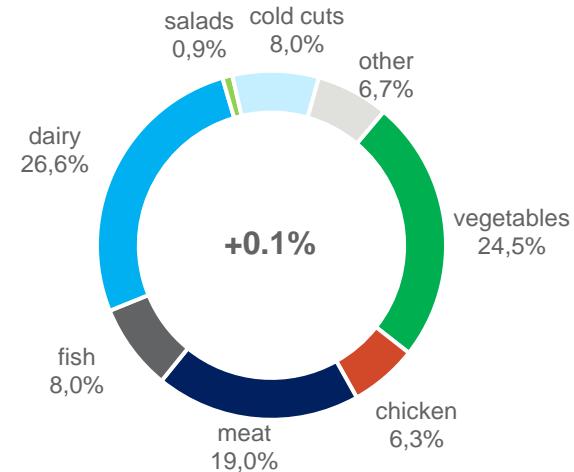


Fish and Salads manage the highest increase in YTD, while Fruits&Vegetables suffer the most intense losses

Random Weight Value sales trend

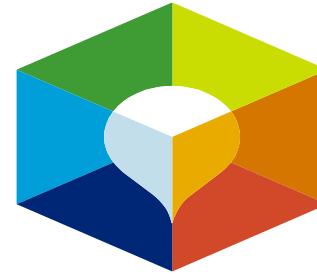


YTD 21 Contribution



Source: IRI Random Weight , YTD April 21

THANK YOU!



For More Information, Contact Us...

IRI Greece

36 Pavlou Bakogianni street, Metamorfosi 144 51, Athens
Marketing.Greece@IRIworldwide.com
+30 210 27 87 600

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