



Trends for the Greek FMCG environment

MARKET VIEW

February 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 - February 2021 vs January - February 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



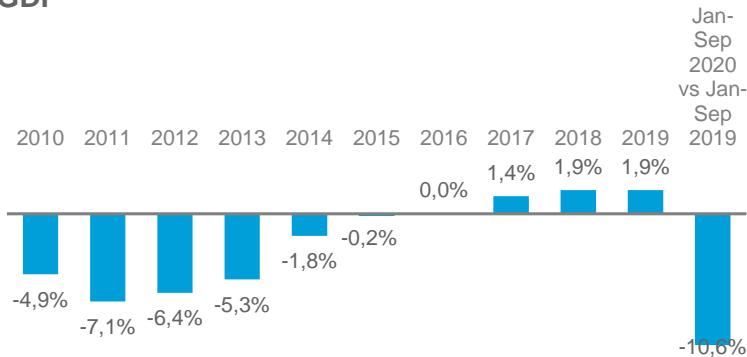


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GREEK ECONOMY

Greek Economy

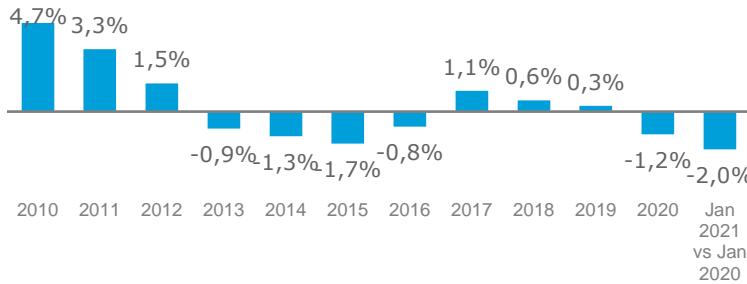
GDP



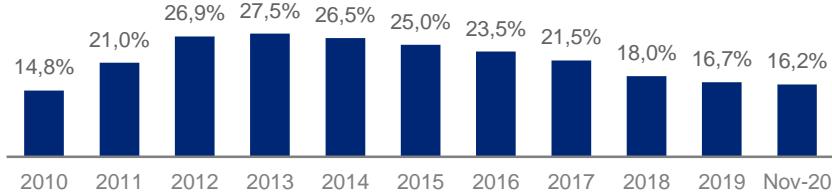
RETAIL TURNOVER INDEX (w.o AUTOMOTIVE FUEL)



INFLATION RATE TREND



UNEMPLOYMENT



Source: ELSTAT (latest available period/provisional data)

2

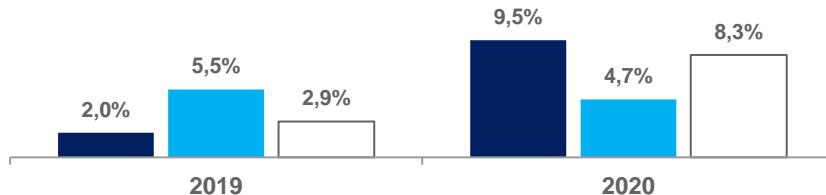
TRENDS FOR THE FMCG MARKET



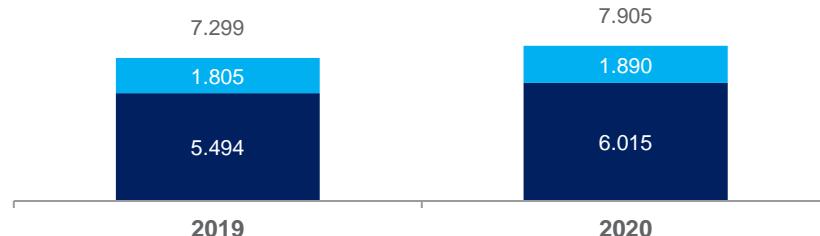
Growth 8.3% for Total FMCG Market in 2020, coming from both segments. More intense increase for Fixed Barcodes

Value sales trend

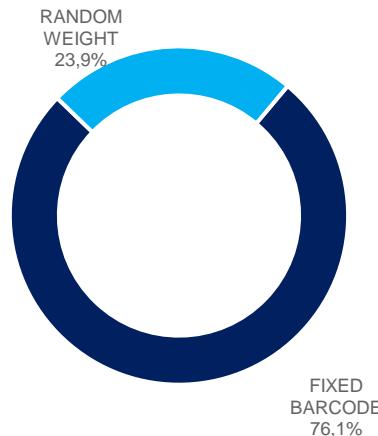
■FB ■RW □TOTAL FMCG



Value Sales (in Millions)



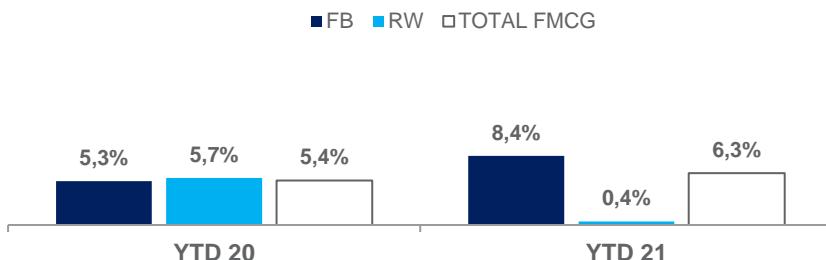
2020 Value Contribution



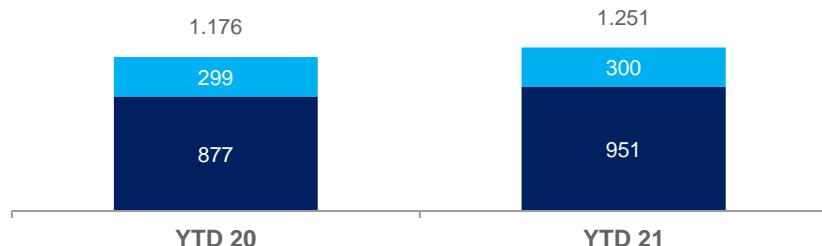
Source: IRI InfoScan, HM/SM + Random Weight, Year 2020

Fixed Barcodes lead the growth in YTD 21

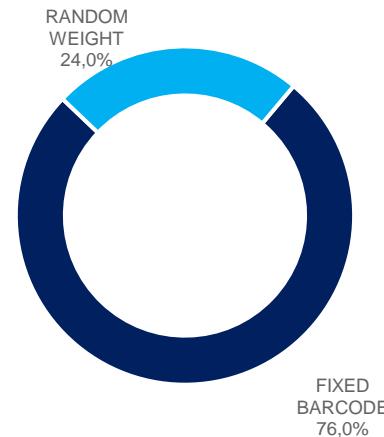
Value sales trend



Value Sales (in Millions)



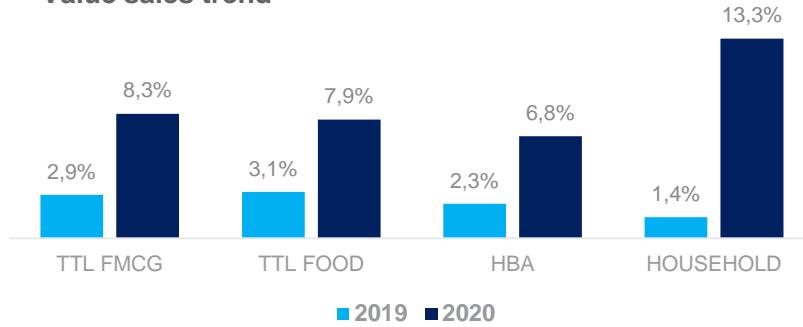
2021 Value Contribution



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

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

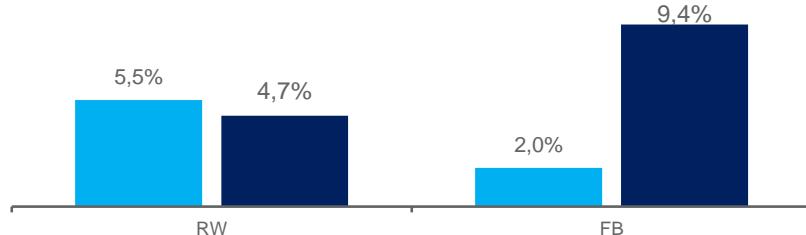
Value sales trend



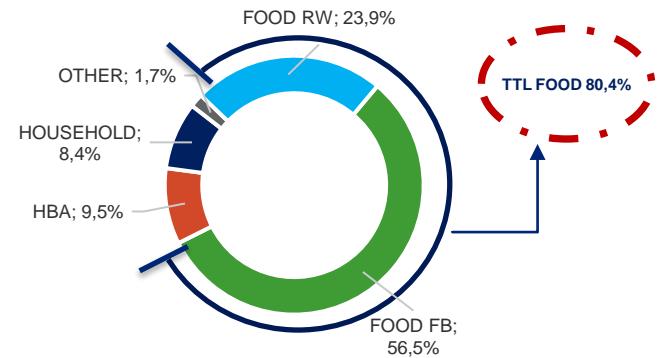
■ 2019 ■ 2020



Food sales trend



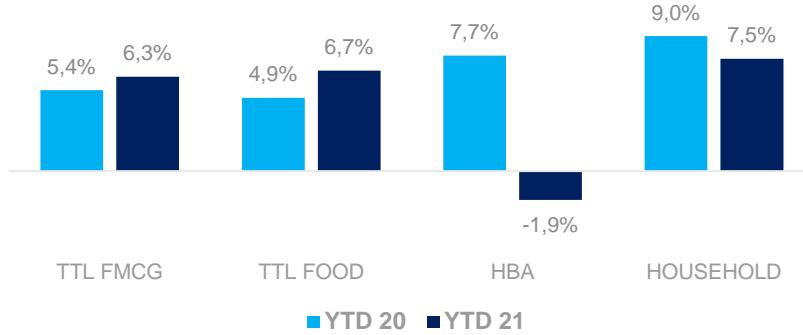
2020 Value Contribution



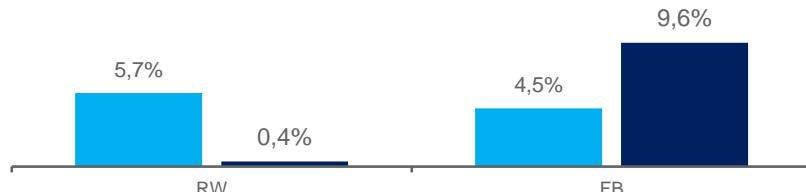
Source: IRI InfoScan, HM/SM + Random Weight, Year 2020

HBA is the only category with declining sales in YTD 21

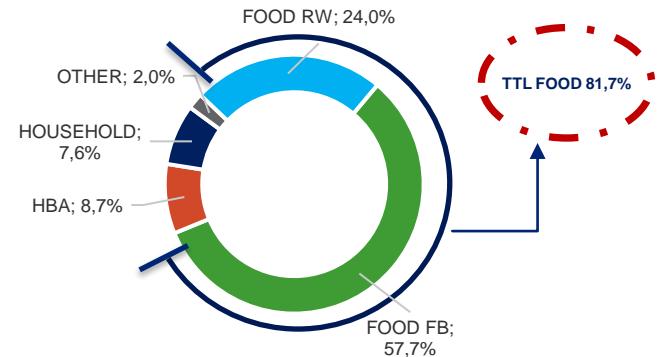
Value sales trend



Food sales trend



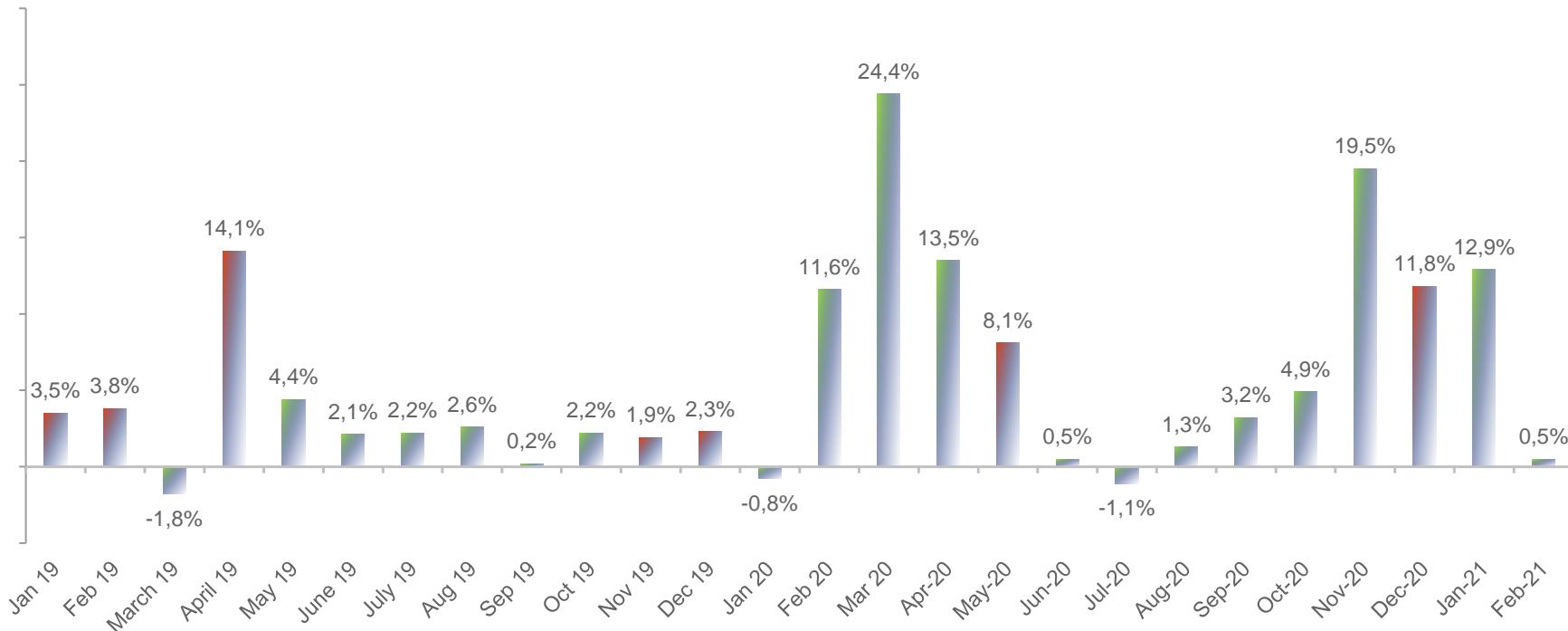
YTD 2021 Value Contribution



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

February value sales slightly increased by 0.5%

Total FMCG Value sales trend by month



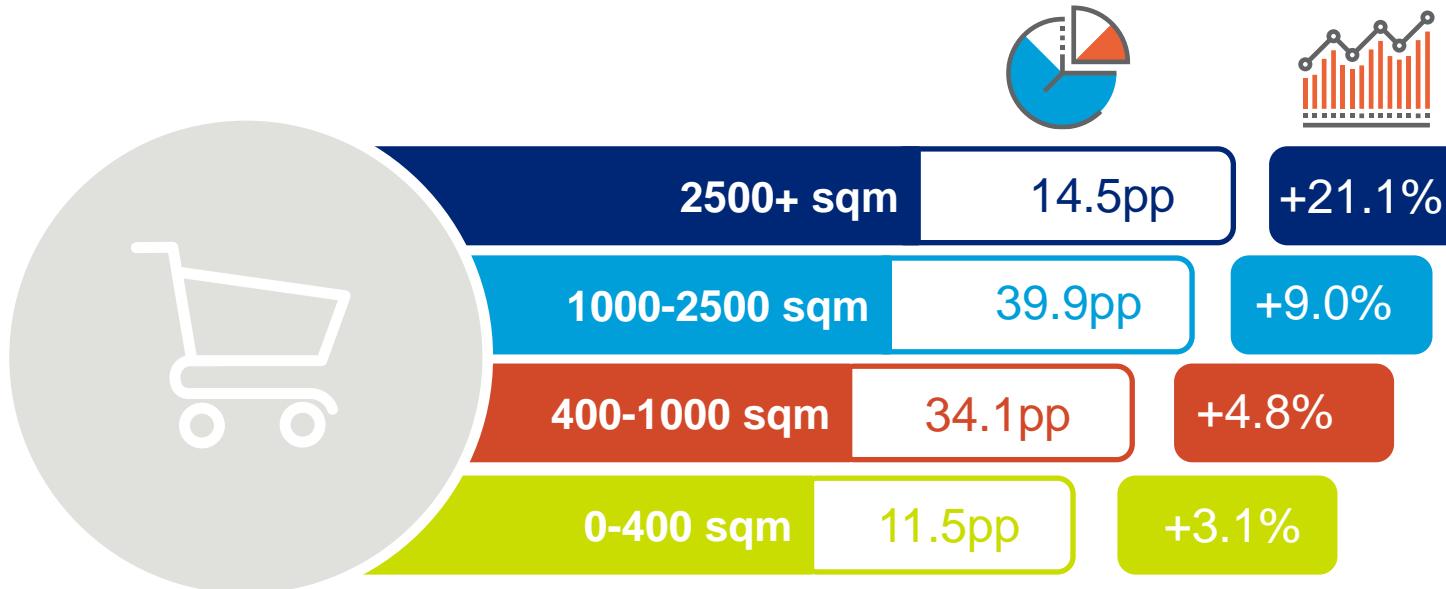
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RETAIL EXCLUDING RANDOM WEIGHT



Exceptional performance for Hyper Markets in YTD

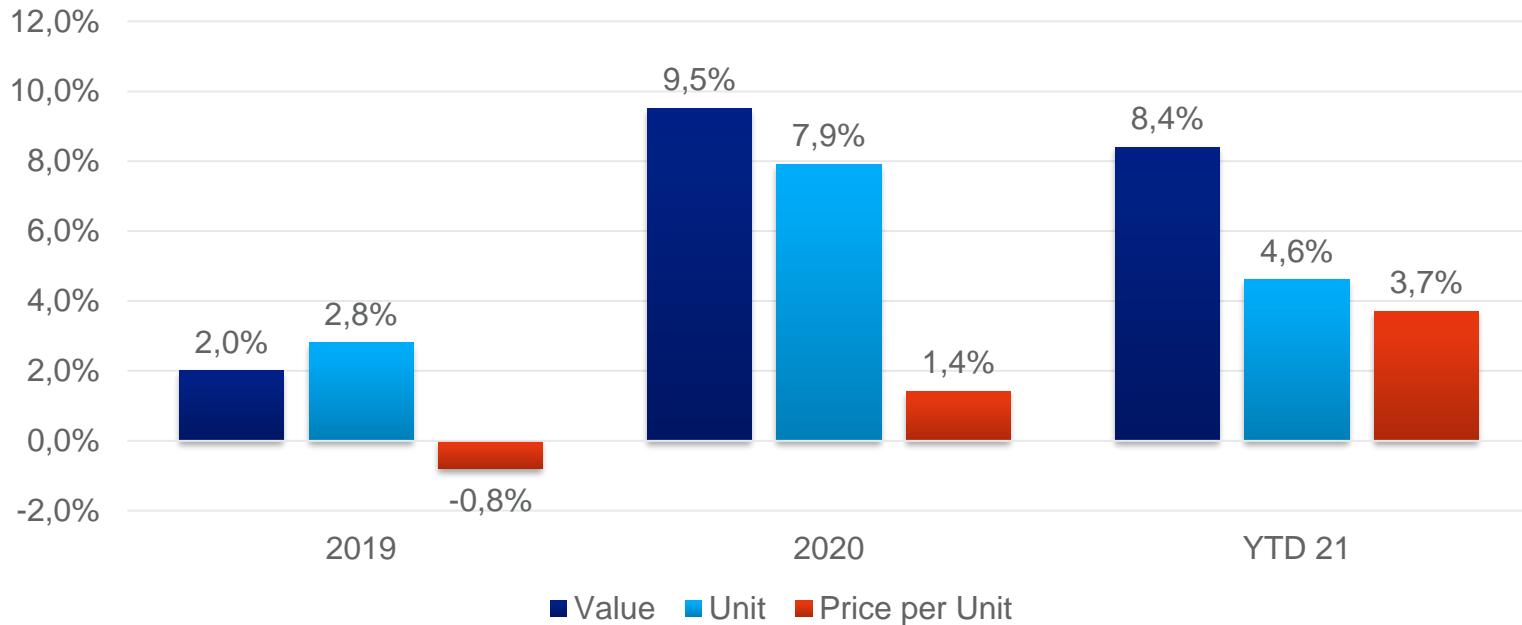
Value Contribution & Trends per shop type – YTD 21



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

Increased prices in YTD by 3,7%

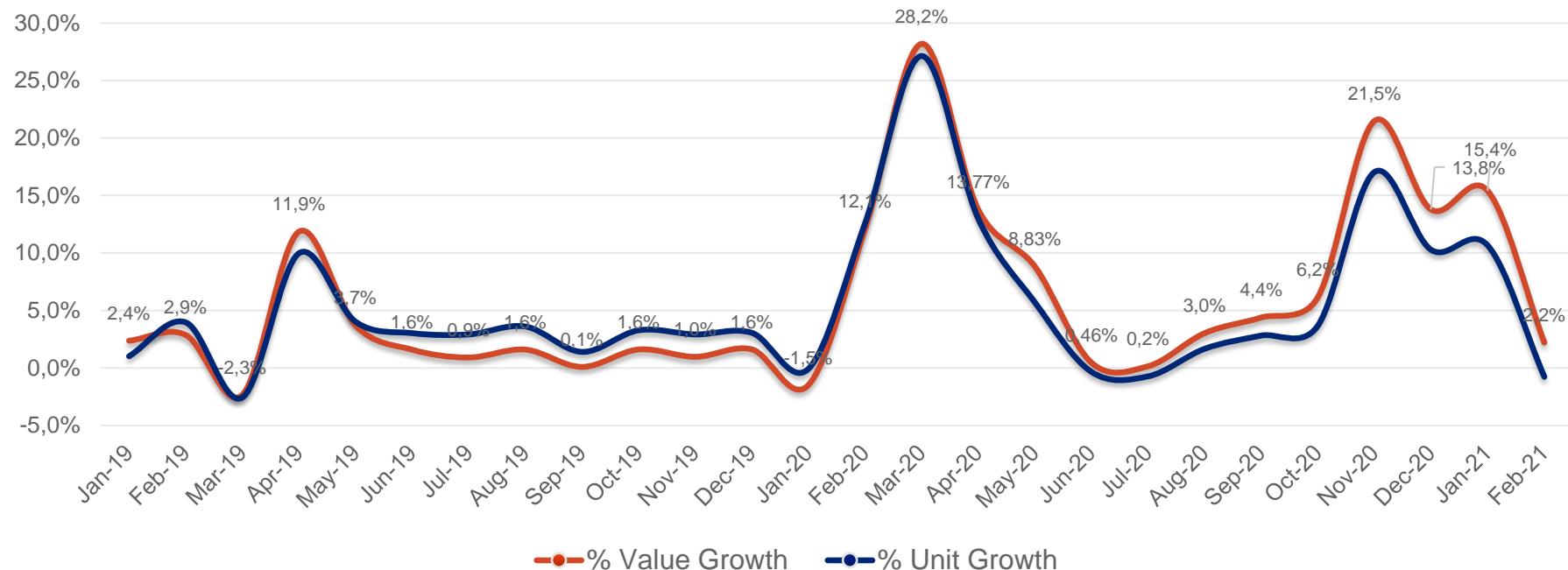
HM/SM Sales and Price Trend



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

Increased by 2,2% are the value sales of last month

HM/SM Value and Unit Trends per Month





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GIGA CATEGORIES EVOLUTION

Food manages almost double-digit growth in YTD while HBA suffers decline

HM/SM Value Sales Trend

YTD 21



Food

Health & Beauty

Household

2020



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

Household is growing more intense in terms of units

HM/SM Unit Sales Trend

YTD 21



Food



Health & Beauty



Household

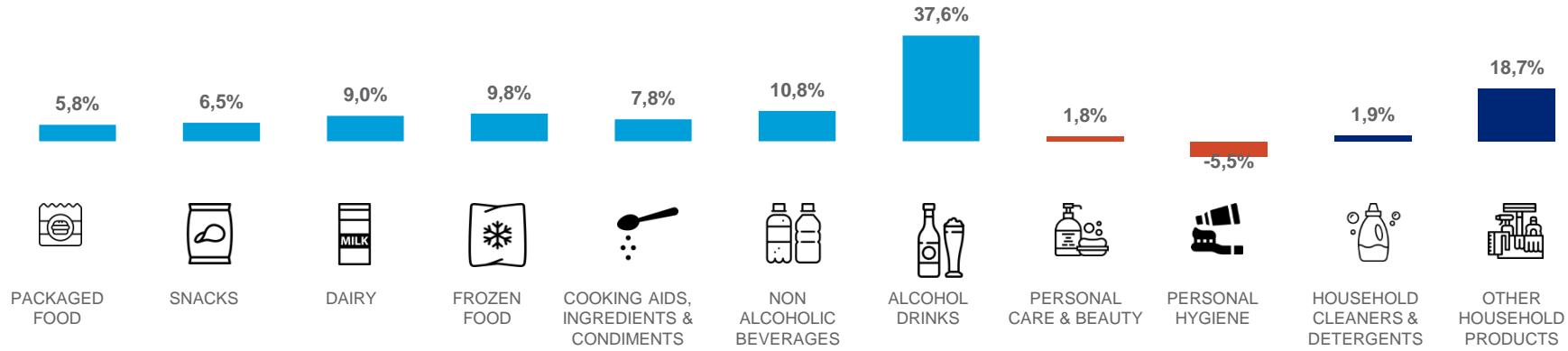
2020



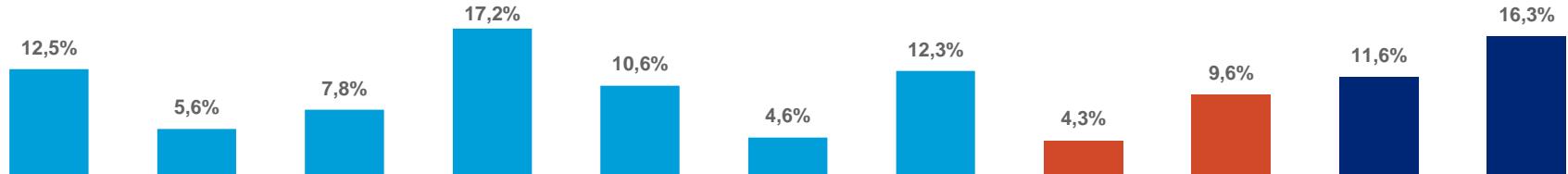
Source: IRI InfoScan, HM/SM , YTD February 21

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

HM/SM Value Sales Trend YTD 21



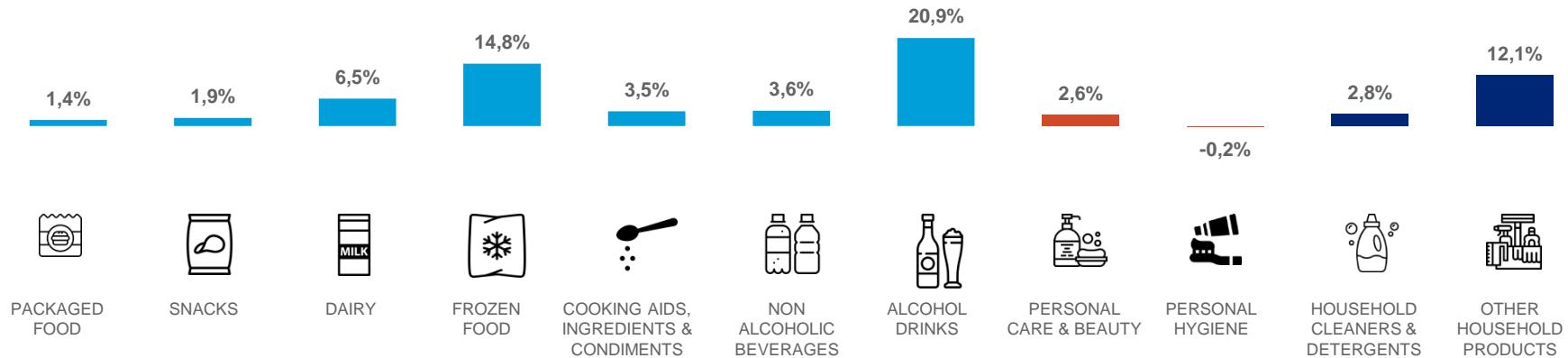
HM/SM Value Sales Trend 2020



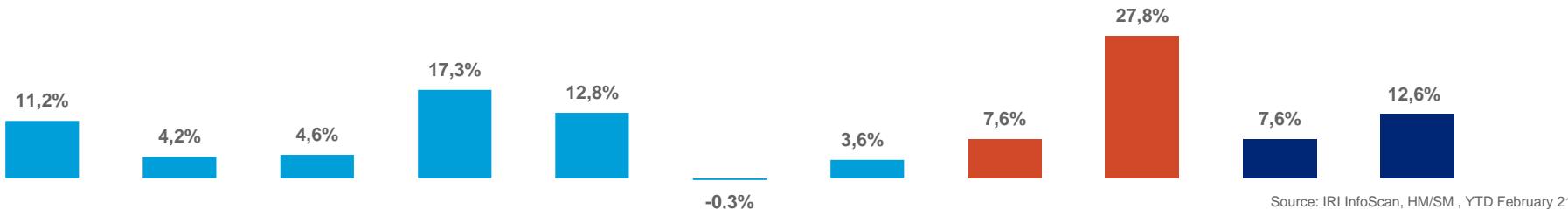
Source: IRI InfoScan, HM/SM , YTD February 21

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 February 21

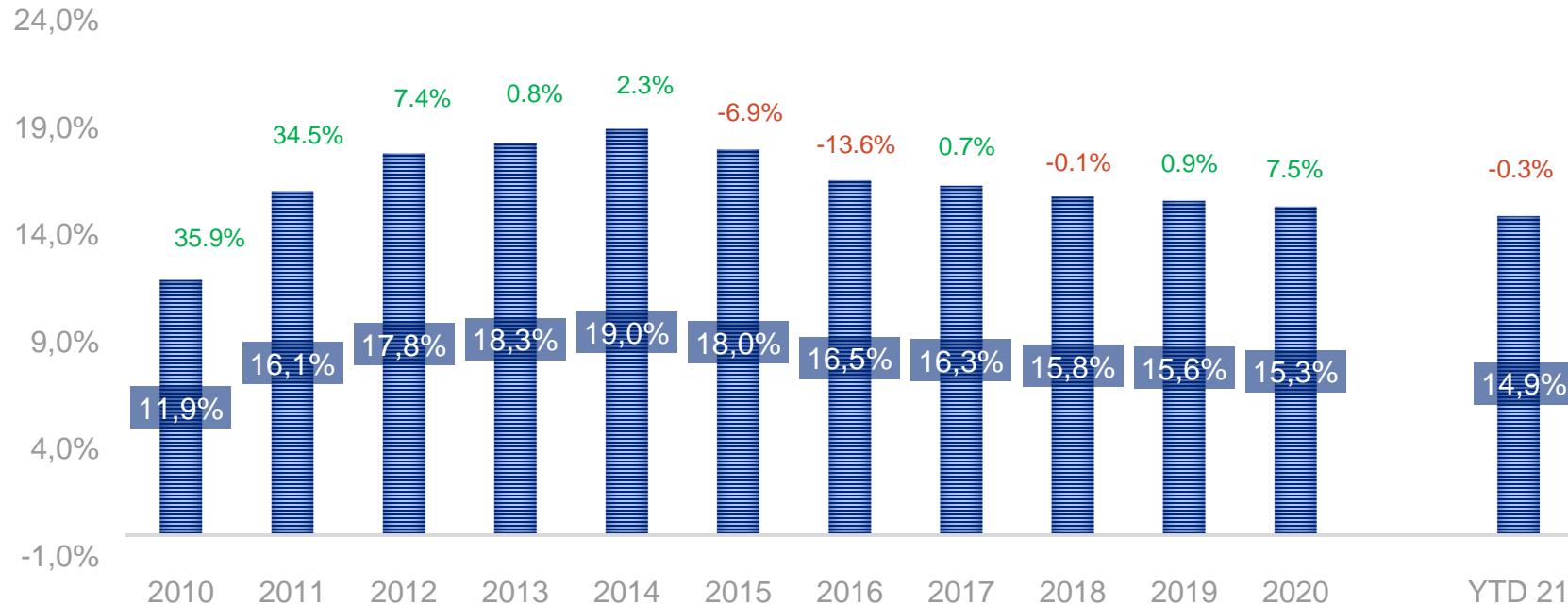
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EVOLUTION OF PRIVATE LABELS



PL slightly decline their sales in YTD

PL Value Share and Trends in HM/SM

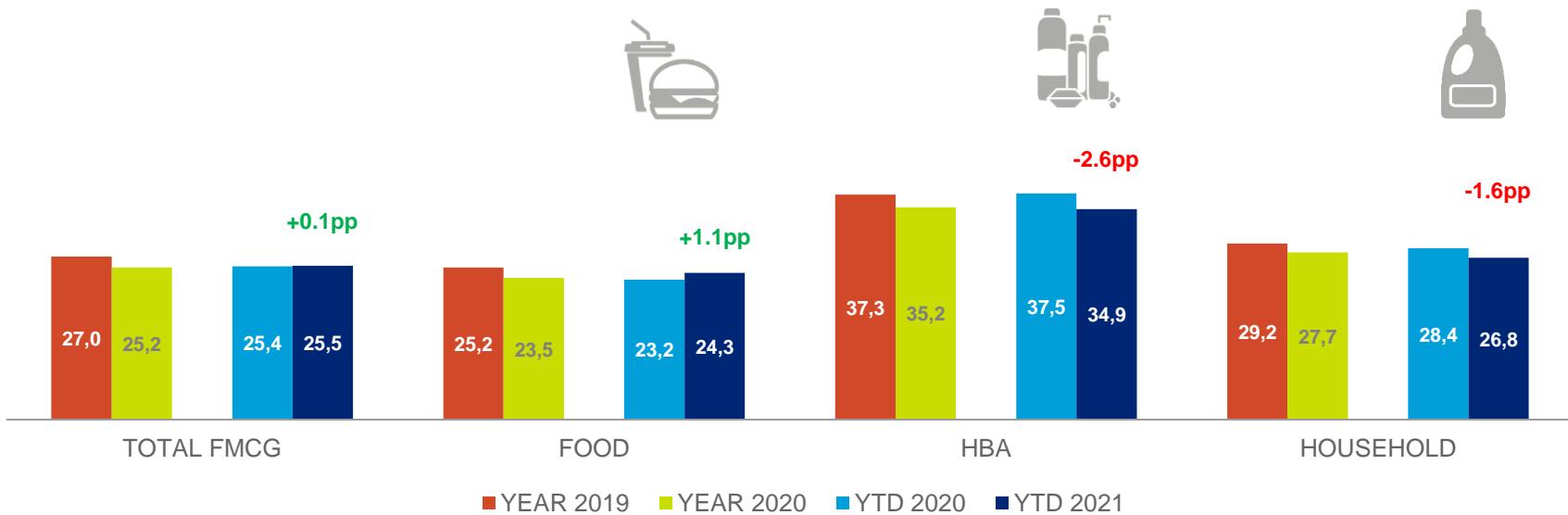


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PRICE TRENDS – PROMO PRESSURE DUE TO TPR

Food is the only category with increased promo intensity in YTD 21

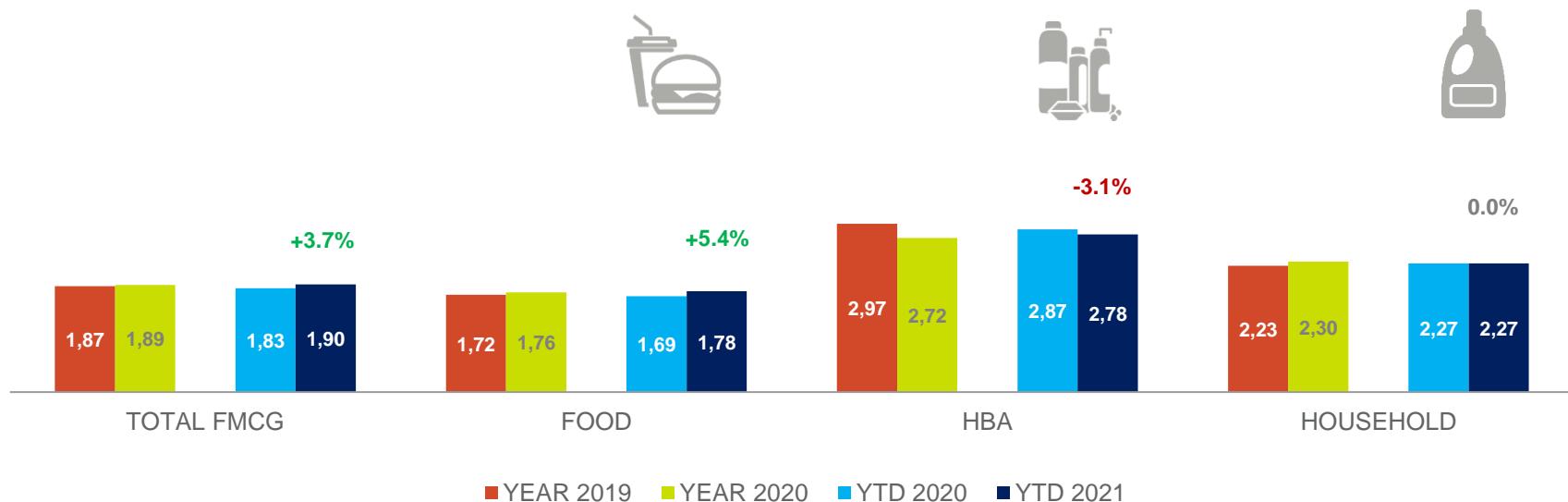
%Value Sales due to Temporary Price Reduction



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

Decreased prices only for HBA in YTD 21

Price per Unit per Giga Category



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

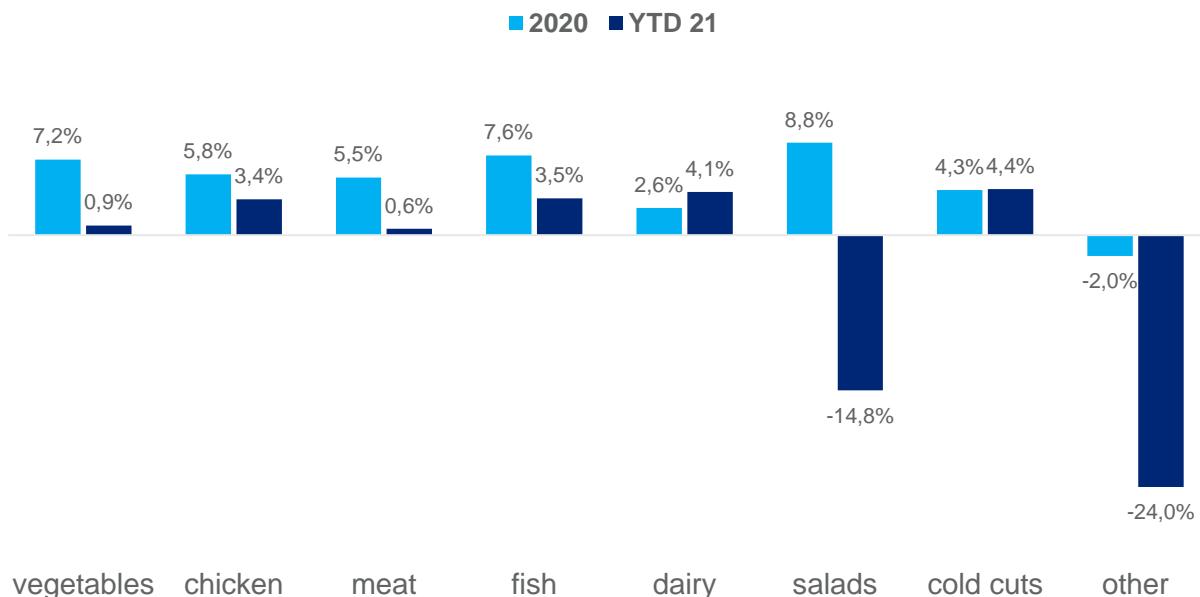
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RANDOM WEIGHT CATEGORIES CONTRIBUTION & GROWTH

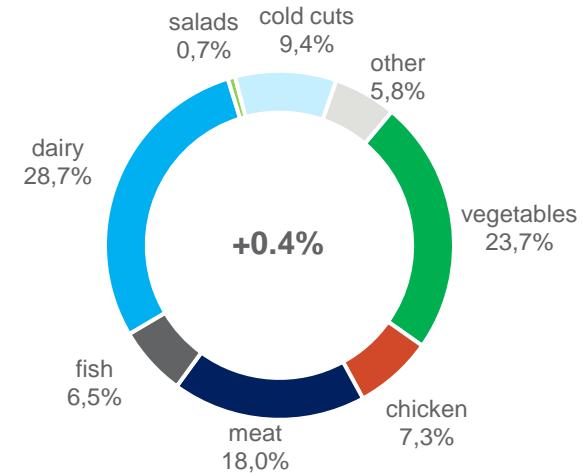


All Categories are growing in YTD , except Salads and Rest

Random Weight Value sales trend

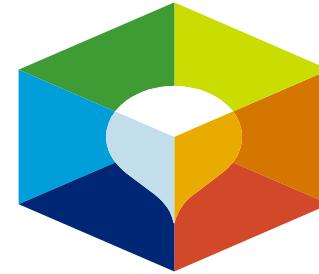


YTD 21 Contribution



Source: IRI Random Weight , YTD February 21

THANK YOU!



For More Information, Contact Us...

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