



MARKET VIEW December 2024

Trends for the Greek FMCG environment



Study ID

01 METRICS

Value and Units Sales Trends:
Super/Hyper Markets FMCG

Random Weight Value Sales Trends :
Super/Hyper Markets

03 AREAS

Greece Mainland & Crete

02 CHANNELS

Super/Hyper Markets

(Self-service retail stores with a central check-out area and at least 2 cash registers)

04 PERIODS

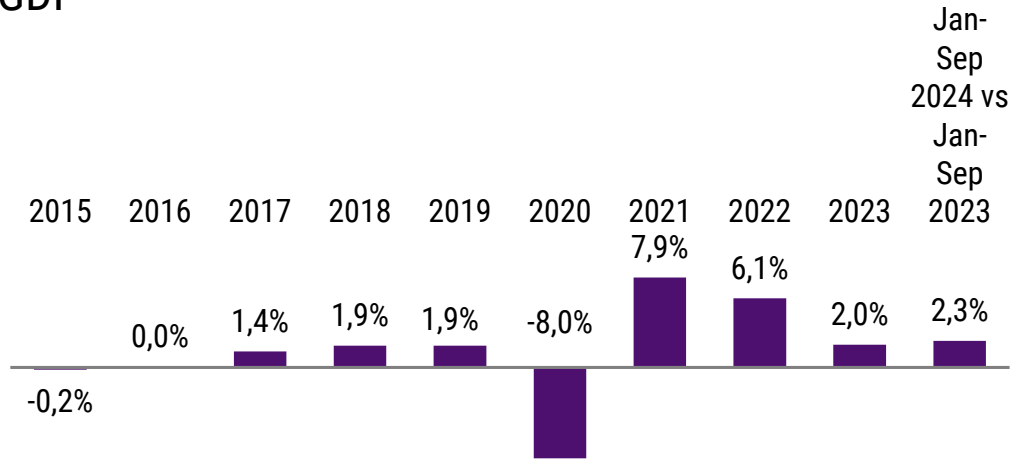
YR 2024 vs YR 2023

01

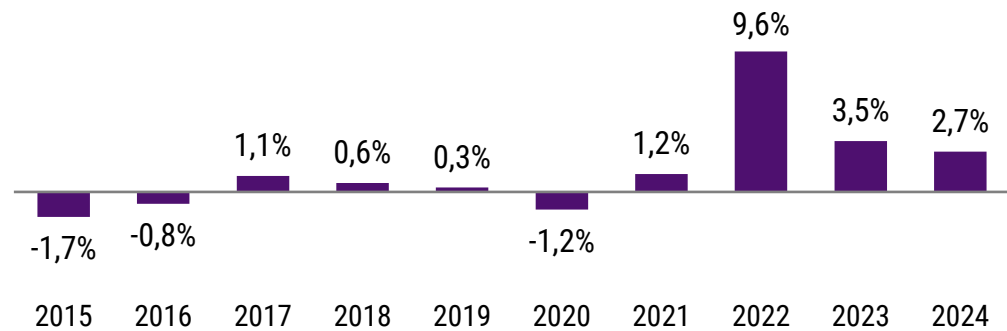
Greek Economy

Greek Economy

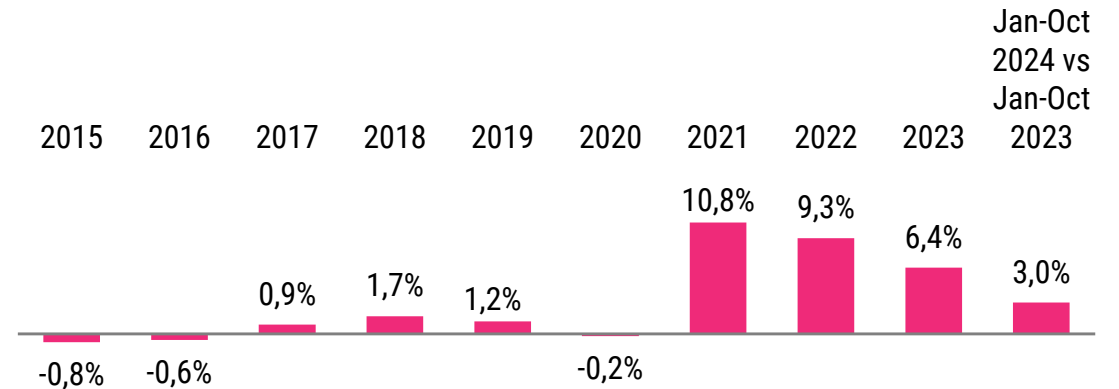
GDP



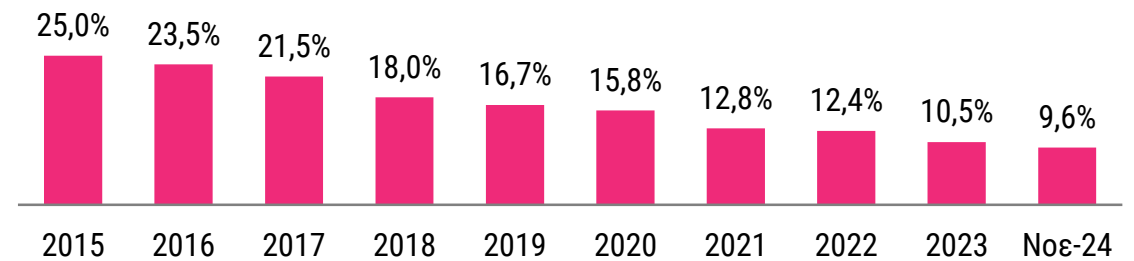
INFLATION RATE TREND



RETAIL TURNOVER INDEX (w.o AUTOMOTIVE FUEL)



UNEMPLOYMENT





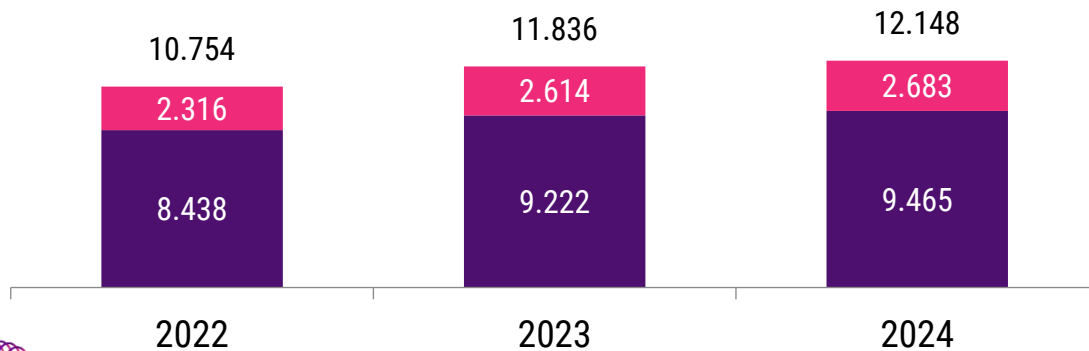
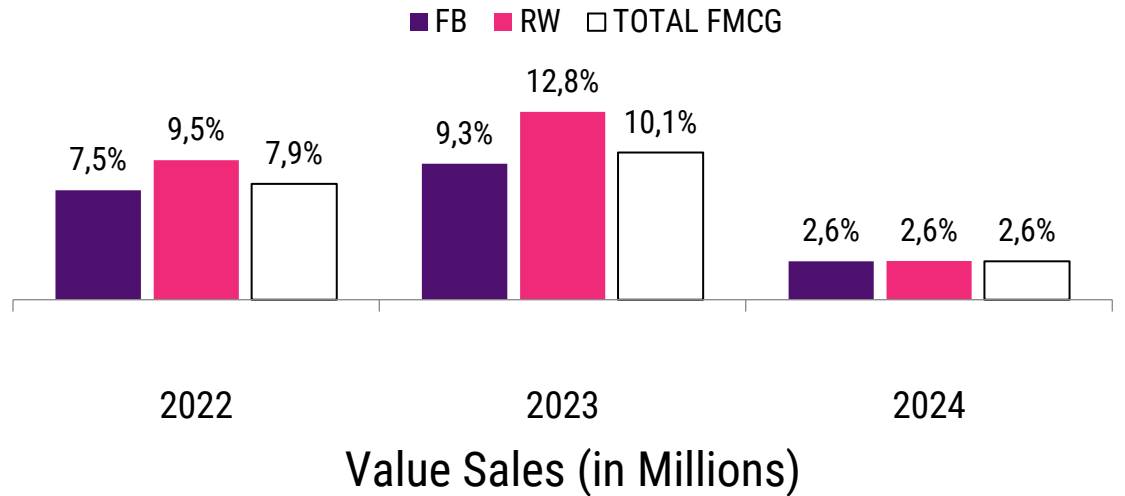
02

Trends for FMCG Market

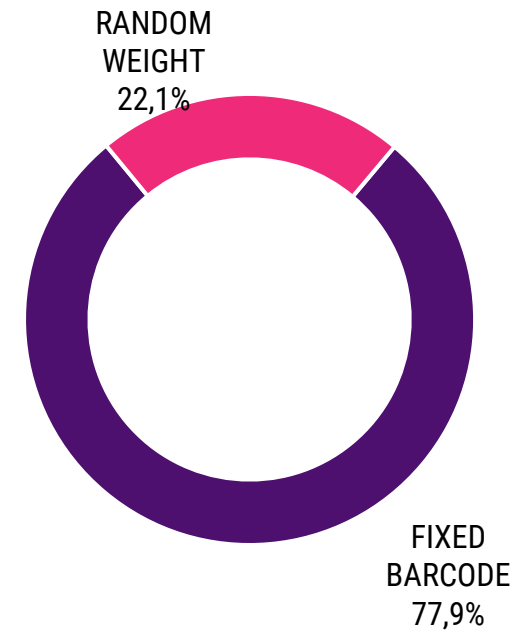
Fixed Barcodes + Random Weight

FMCG Value Sales Trend – Year 2024

Growth by 2,6% for Total FMCG Market in 2024, coming from both Segments



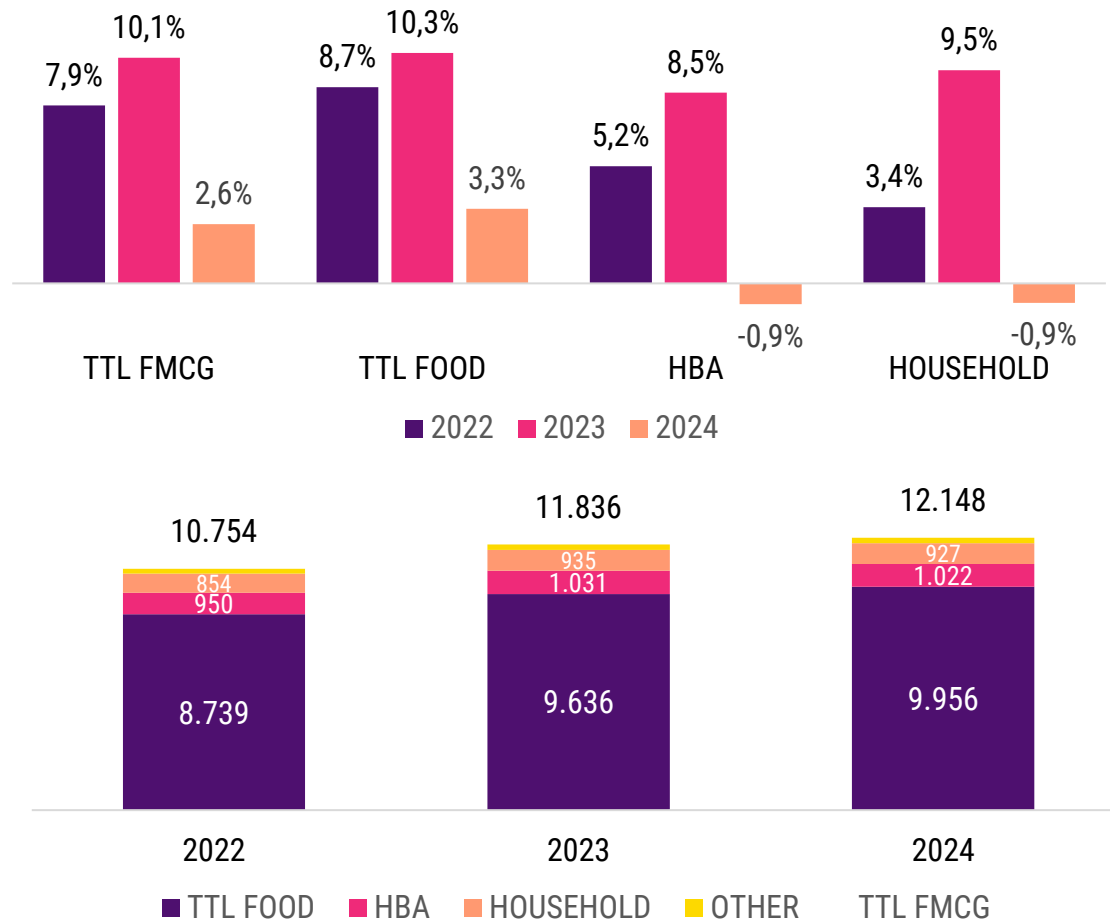
2024 Value Contribution



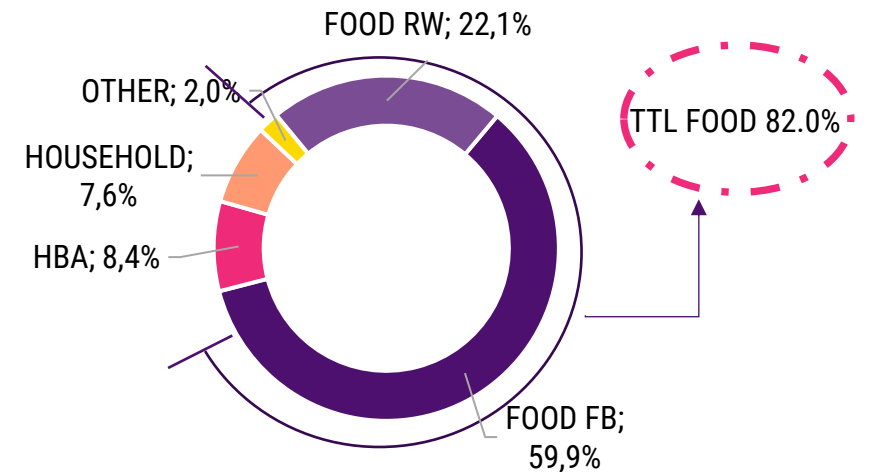
Source: Circana InfoScan, HM/SM + Random Weight, Year 2024

FMCG Value Sales Trend – Year 2024

Food is the Category which contributes to total FMCG growth in Year 2024



2024 Value Contribution





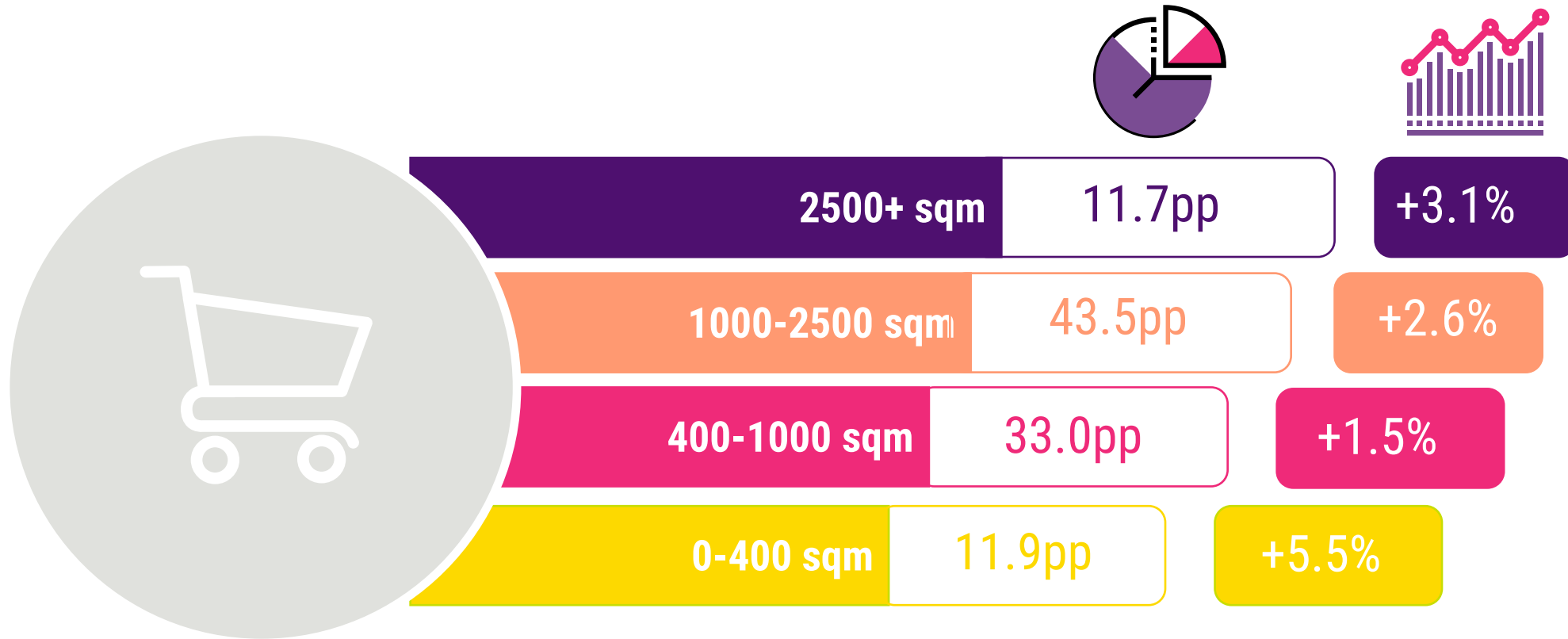
03

Trends for FMCG Market

Fixed Barcodes

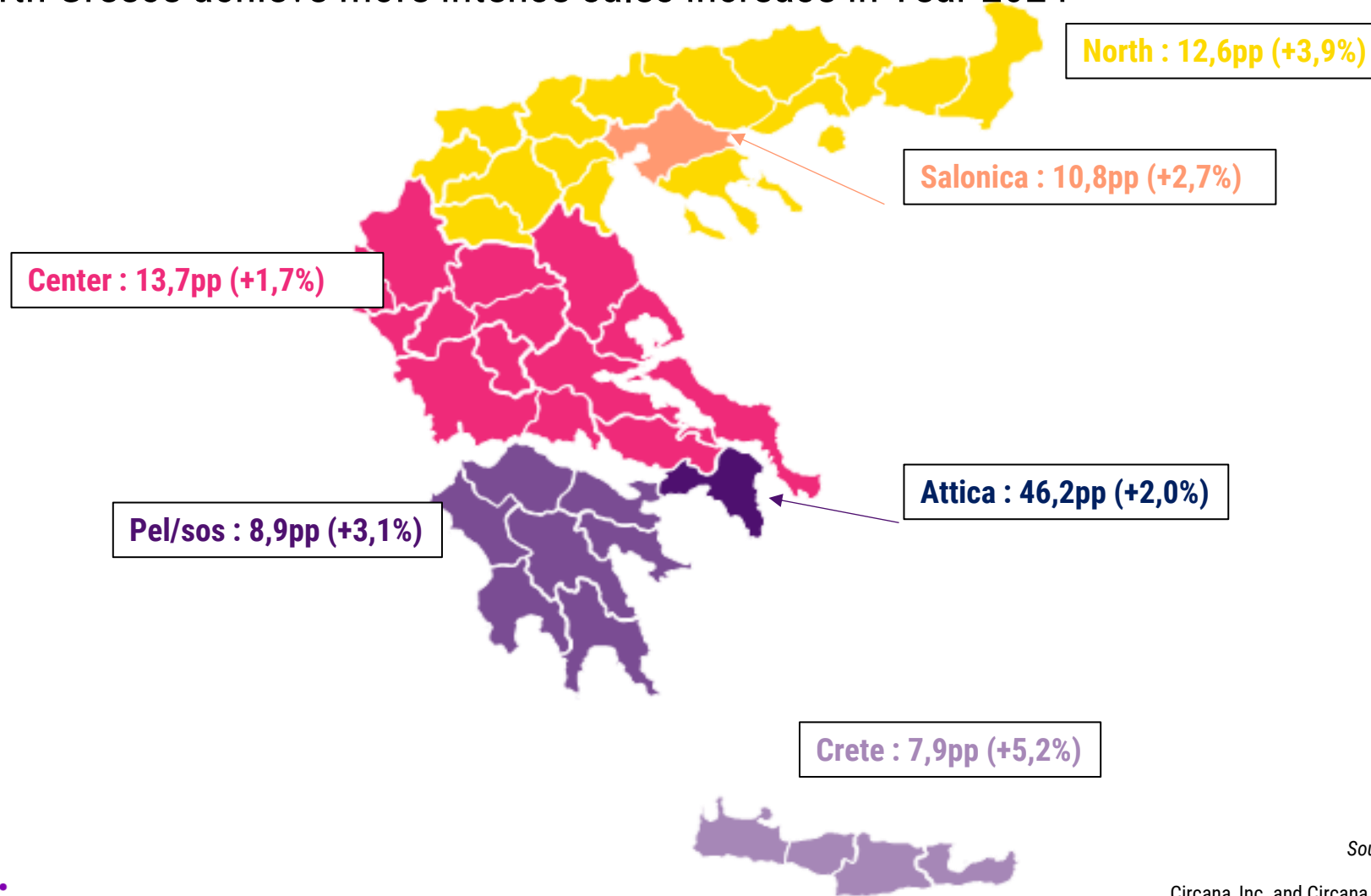
FMCG Value Sales Trends per Store Type Year 2024

All Shop Types improve their sales in Year 2024, more intense for Small and Hyper



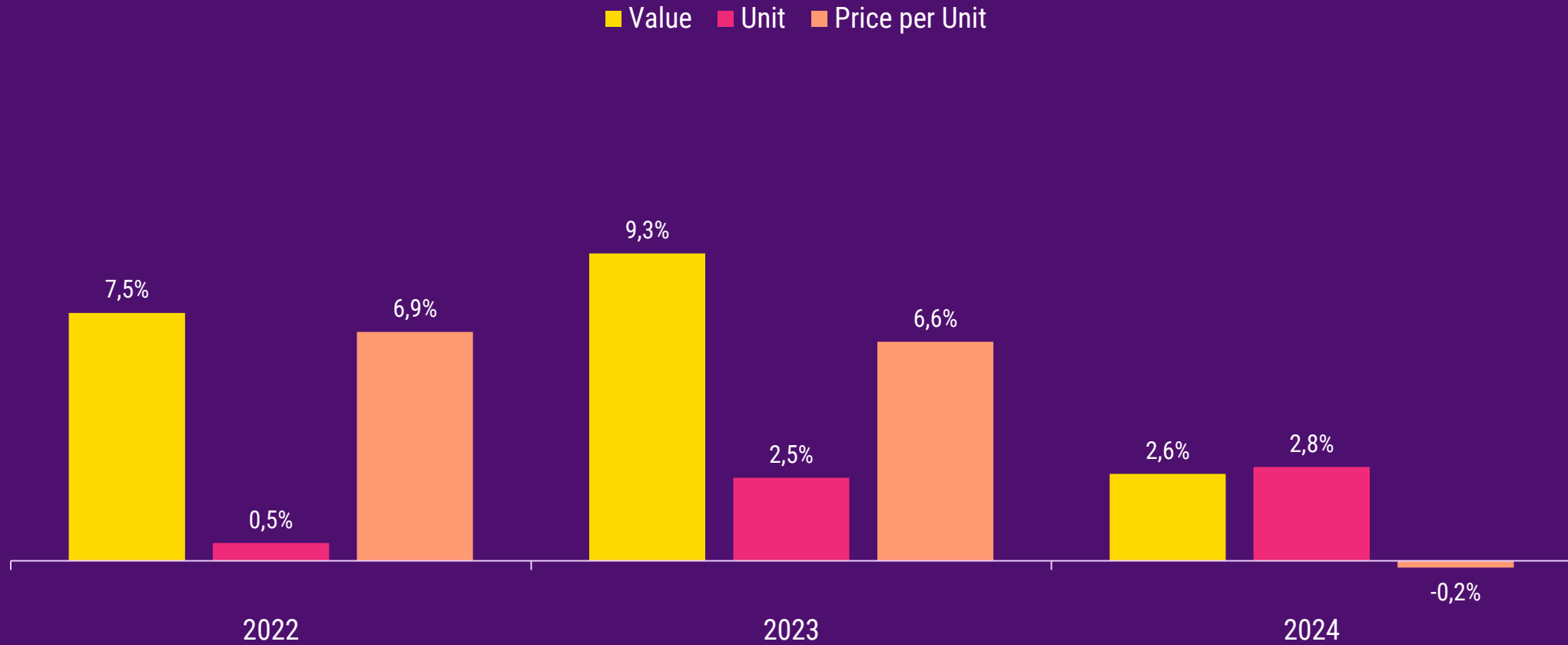
FMCG Value Sales Trends per Geo Year 2024

Crete and North Greece achieve more intense sales increase in Year 2024



FMCG Price Trends

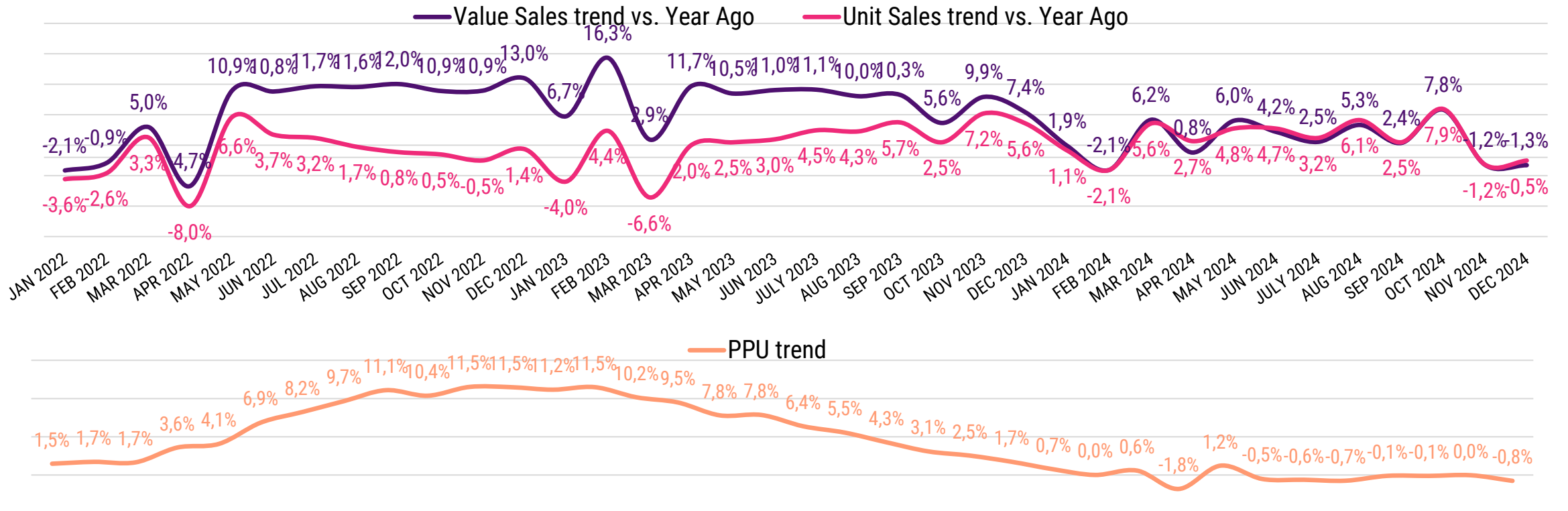
Sales increase in Year 2024 both for Value and Units



FMCG Value and Unit Monthly Trends

Slight Price per Unit decrease during the last months

YR 2022: +7.5%
YR 2023: +9.3%
YR 2024: +2.6%



Source: Circana InfoScan, HM/SM, Year 2024



04

Giga Categories Evolution

Giga Categories Value Sales Trend

Food is the Category which contributes to total FMCG growth in Year 2024

2024



3.6%



-0.9%



-0.9%

Food

Health & Beauty

Household

2023



9.3%



8.5%



9.5%

Giga Categories Unit Sales Trend

All 3 Categories improved their Unit sales in Year 2024

2024



2.8%

Food



3.1%

Health & Beauty



1.5%

Household

2023



2.6%



1.9%

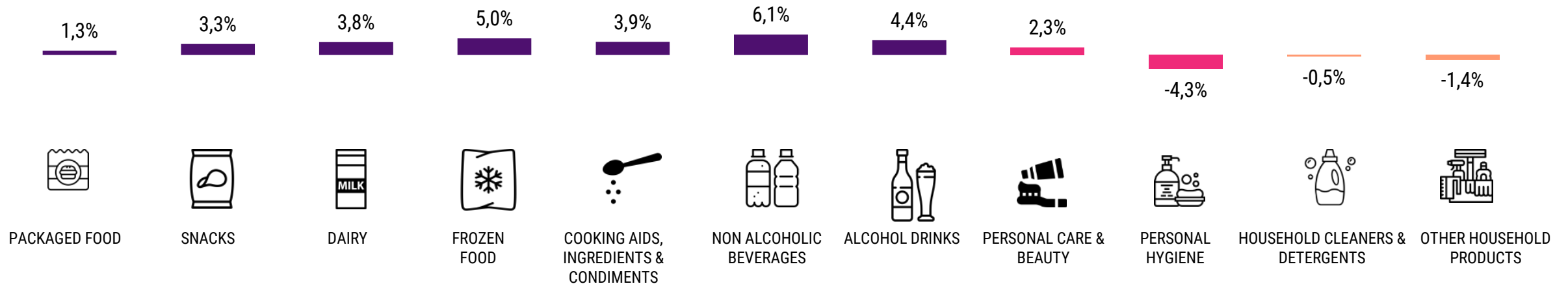


1.1%

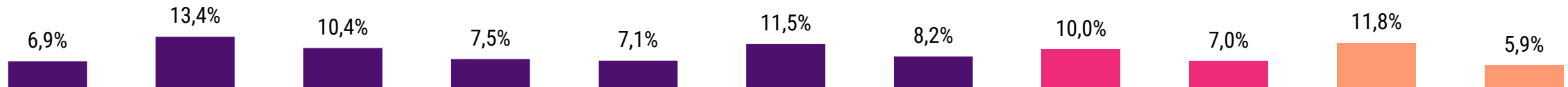
Categories Value Sales Trend Year 2024

All Food Categories manage sales increase in Year 2024. More intense for Non Alcoholic Bevs and Frozen

Value Sales Trend 2024



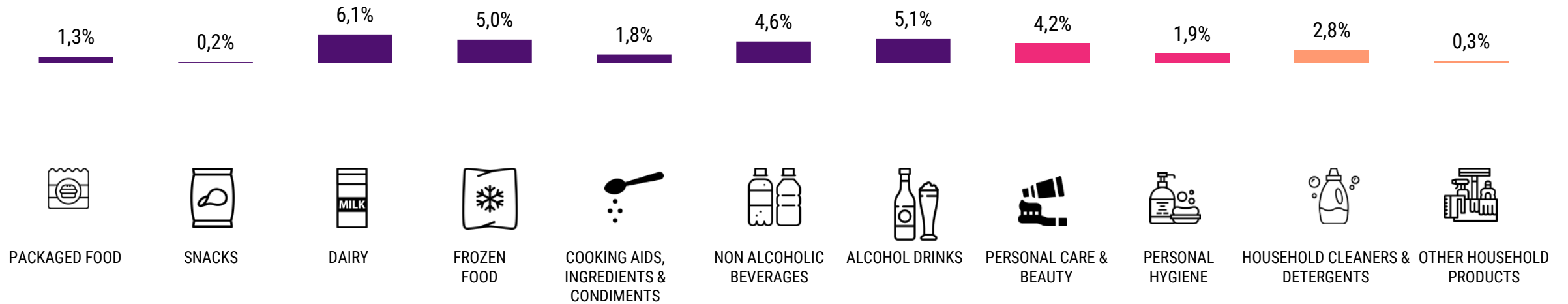
Value Sales Trend 2023



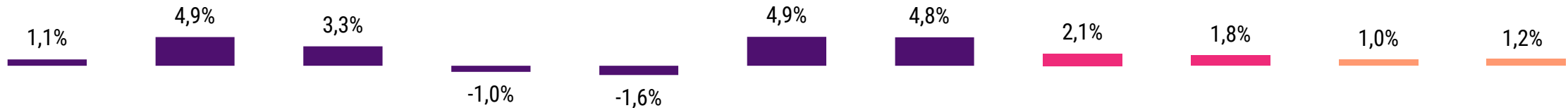
FMCG Unit Sales Trend Year 2024

All Categories manage sales increase in Year 2024. More intense for Dairy, Alcohol and Frozen

Unit Sales Trend 2024



Unit Sales Trend 2023



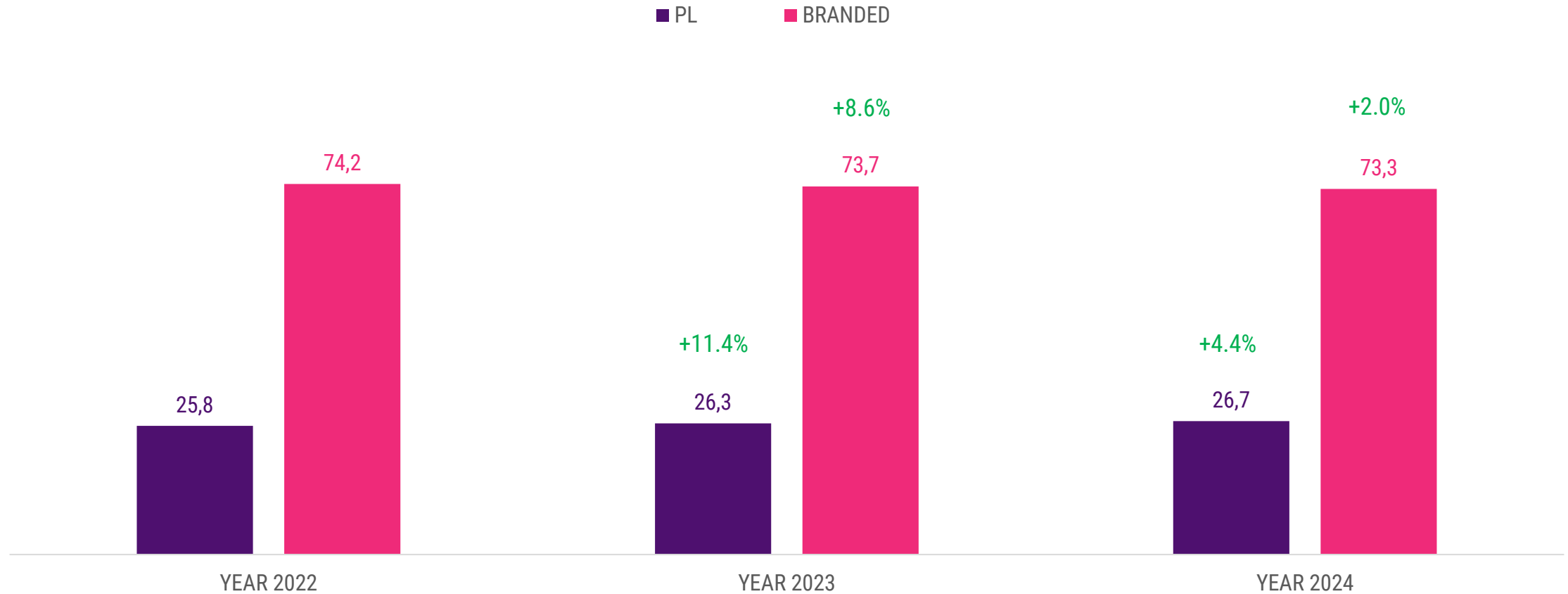


05

Evolution of Private Labels

PL and Branded Value Shares and Trends

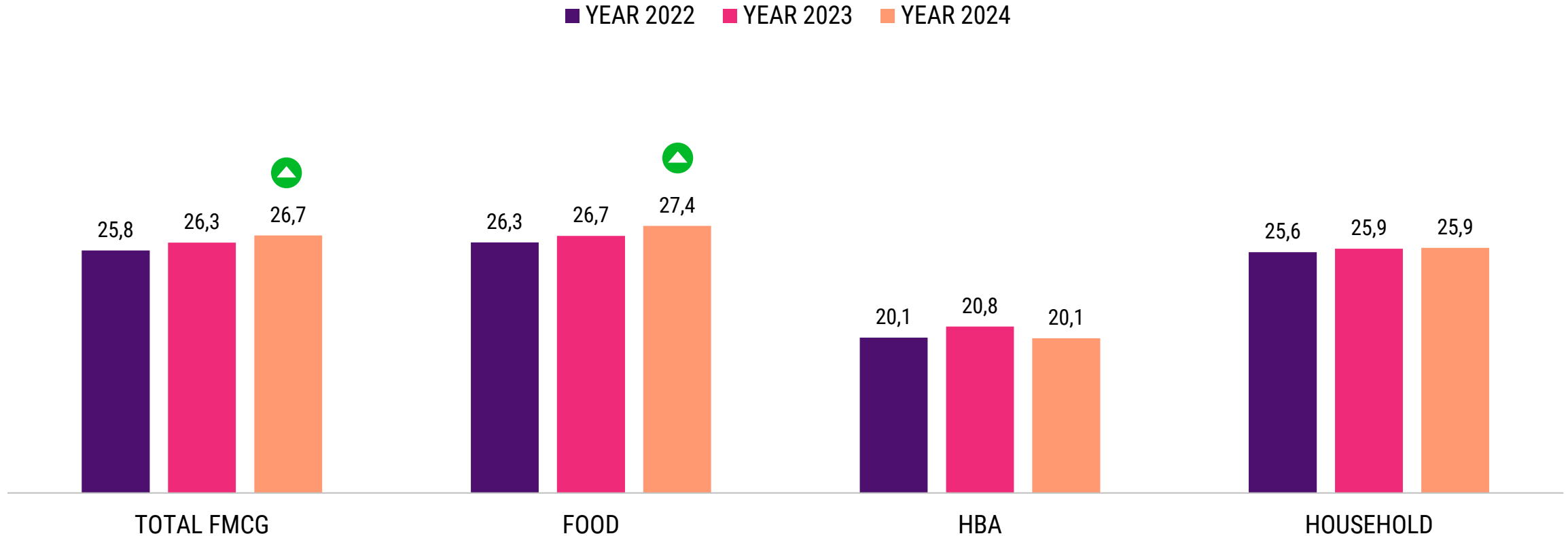
More intense Sales increase for PL in Year 2024



Source: Circana InfoScan, HM/SM, Year 2024

PL Value Share per Giga Category

PL's share reports increase in Year 2024 due to Food



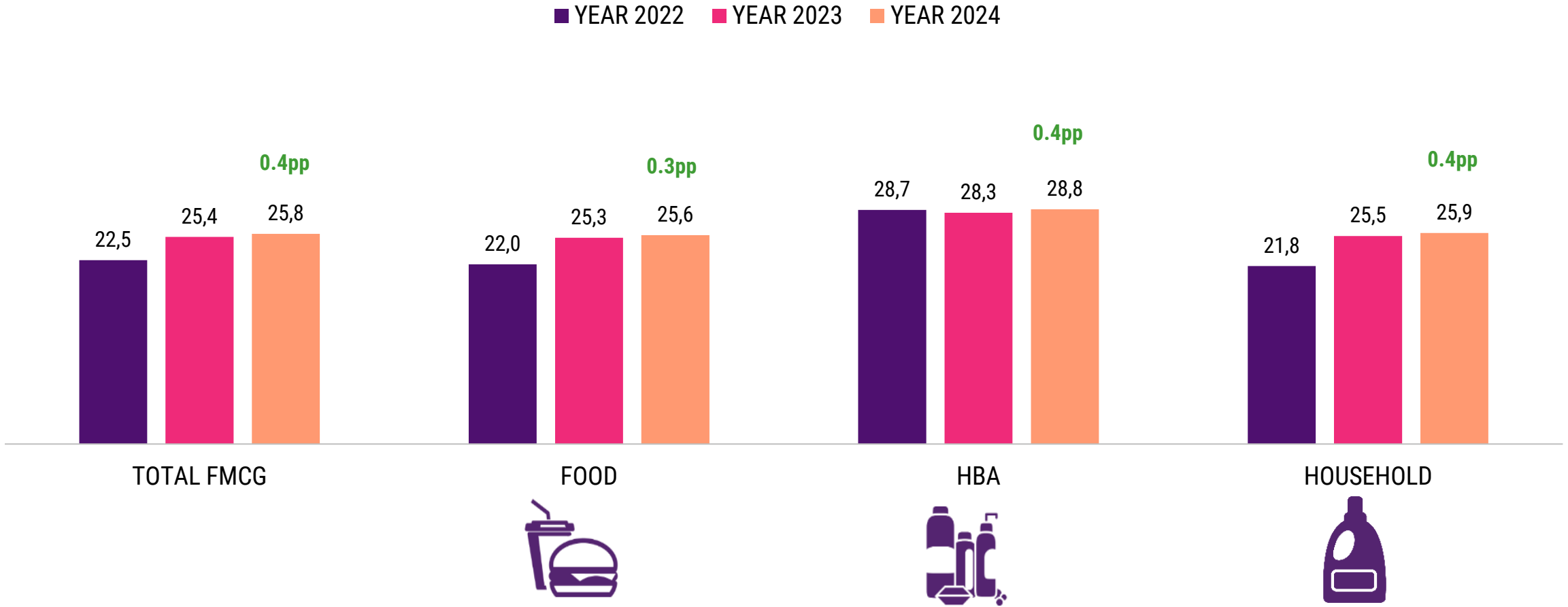


06

Price Trends & Promo Pressure

%Value Sales due to Temporary Price Reduction

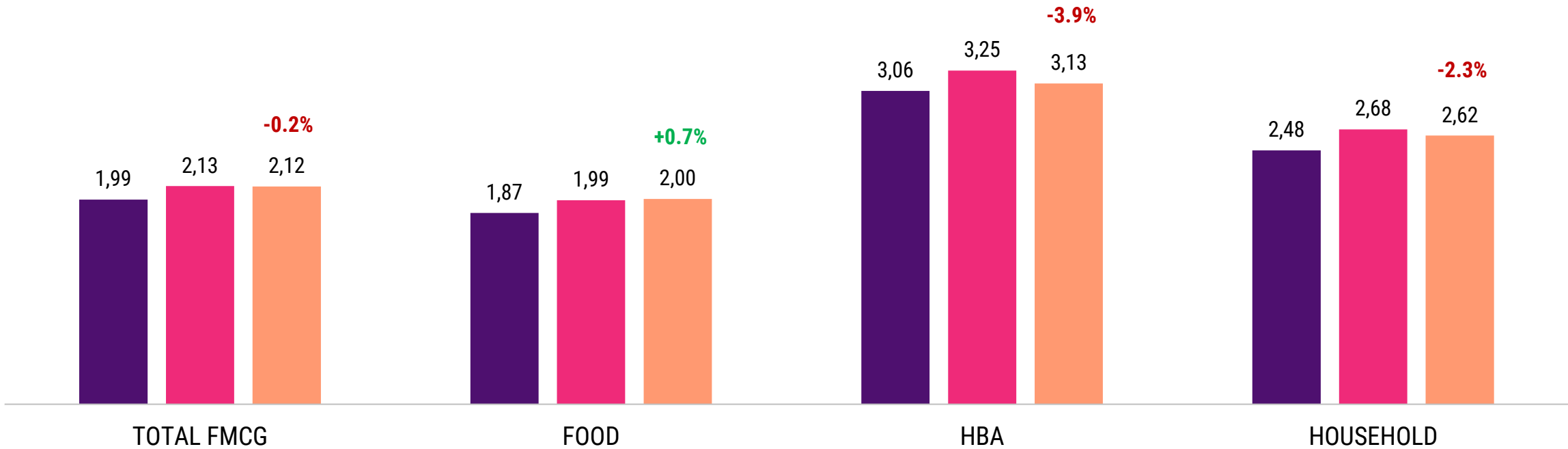
Slight promo intensity increase for Total FMCG in Year 2024 for all 3 Categories



Price per Unit per Giga Category

Price decrease for HBA and Household in Year 2024

■ YEAR 2022 ■ YEAR 2023 ■ YEAR 2024



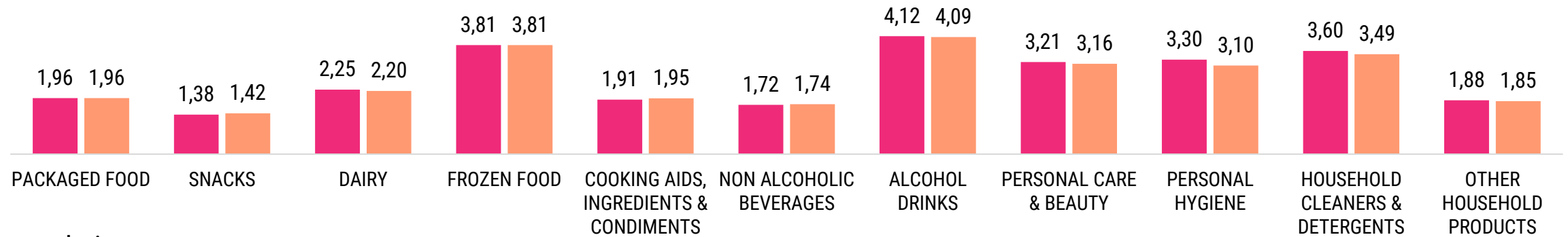
Source: Circana InfoScan, HM/SM, Year 2024

Price per Unit per Category

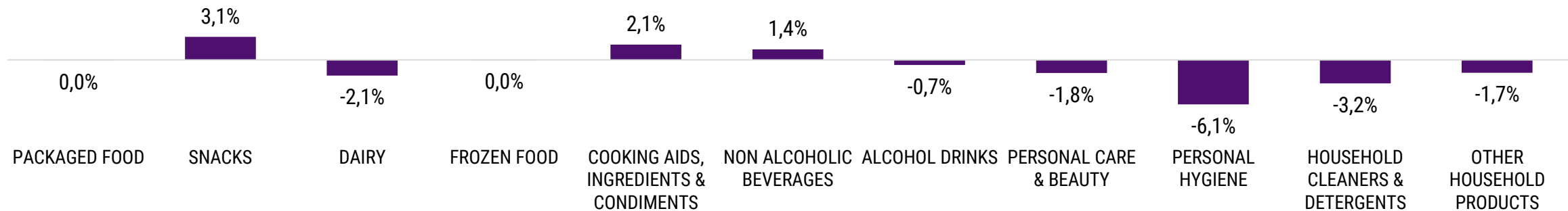
Snacks, Cooking Aids and Non Alcohol Bevs are the only Categories with increasing Prices in Year 2024

Price per Unit

■ YEAR 2023 ■ YEAR 2024



Price evolution



Source: Circana InfoScan, HM/SM, Year 2024



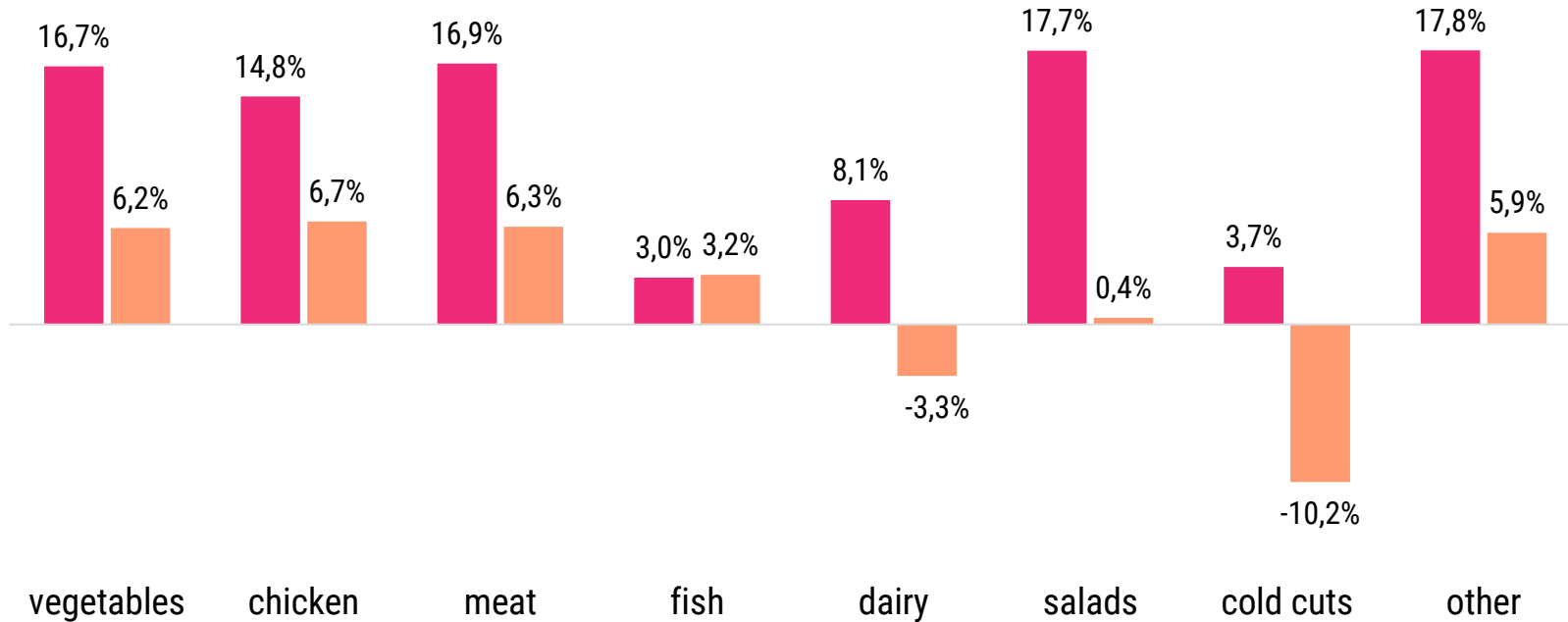
07

Random
Weight
Categories

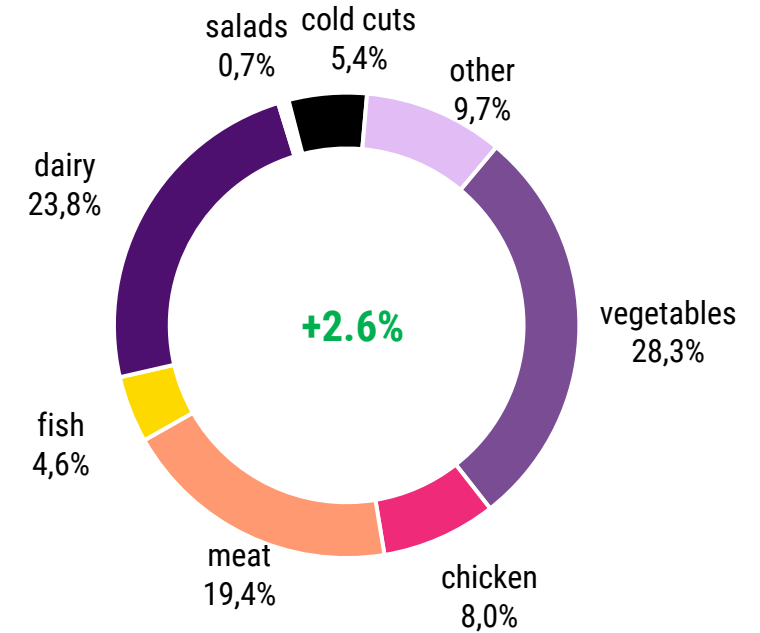
Random Weight Value Sales Trend

Dairy and Cold Cuts are the only declining Categories in Year 2024

■ YEAR 2023 ■ YEAR 2024



Year 2024 Contribution



Source: Circana Random Weight, Year 2024

Thank you

