

Trends for the Greek FMCG environment

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# MARKET VIEW October 2021

IRI Greece



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Growth delivered.

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# Study ID

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## 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 - October 2021 vs January - October 2020

## CHANNELS

## DEFINITIONS

### HYPERMARKET

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

### SUPERMARKET

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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





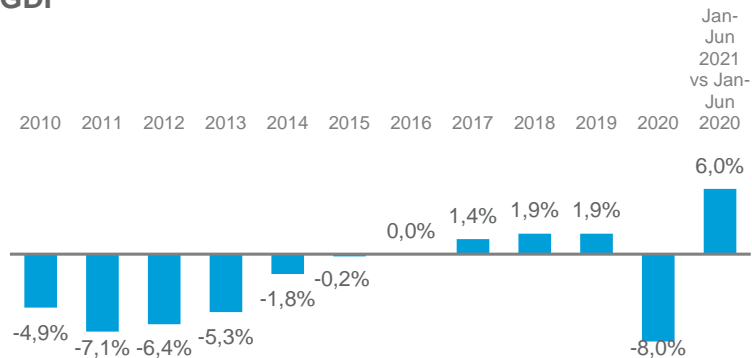
A large iceberg floating in the ocean. The tip of the iceberg is visible above the water surface, while the much larger, jagged base is submerged underwater. The sky is blue with scattered white clouds. The water is a deep blue, and the overall scene is bright and clear.

1

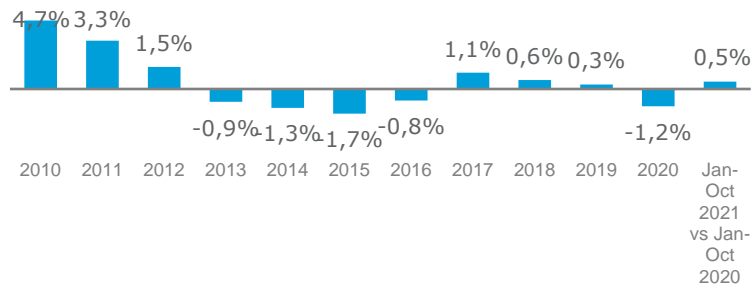
# GREEK ECONOMY

# Greek Economy

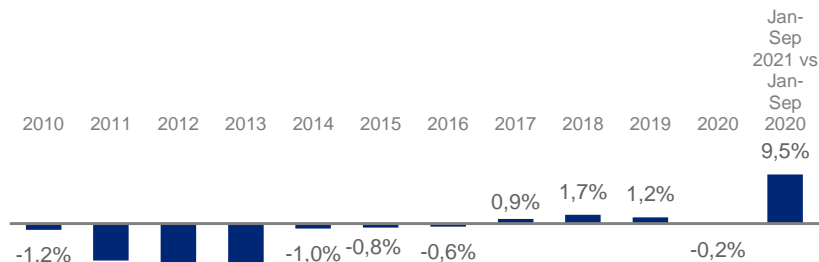
## GDP



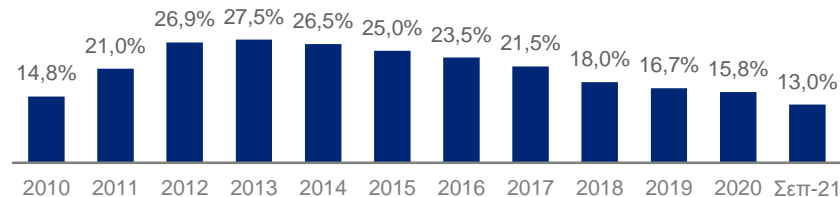
## INFLATION RATE TREND



## RETAIL TURNOVER INDEX (w.o AUTOMOTIVE FUEL)



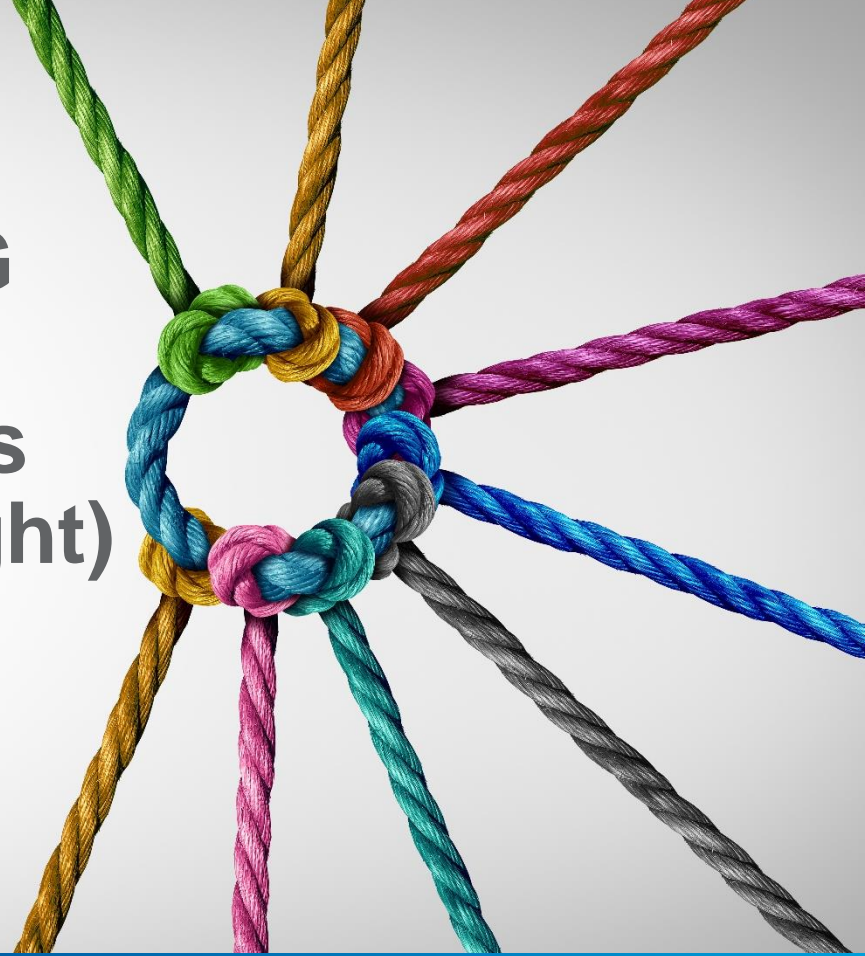
## UNEMPLOYMENT



Source: ELSTAT (latest available period/provisional data)

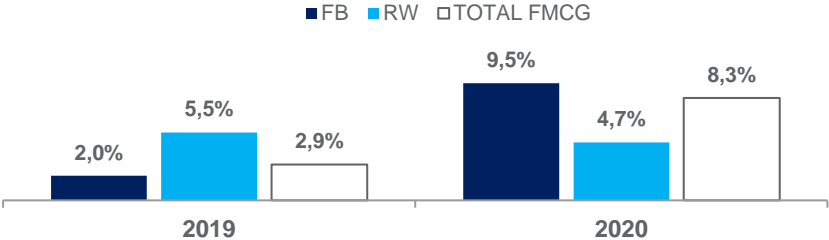
# 2

## TRENDS FOR THE FMCG MARKET (Fixed Barcodes + Random Weight)

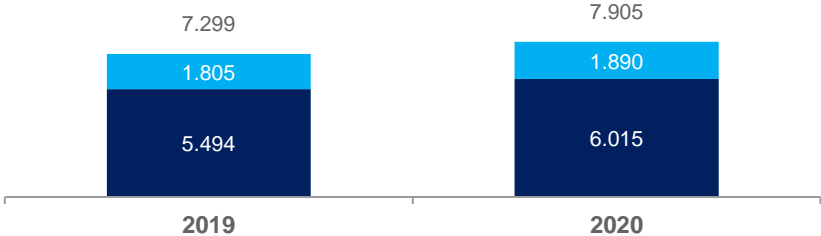


# Growth 8.3% for Total FMCG Market in 2020, coming from both segments. More intense increase for Fixed Barcodes

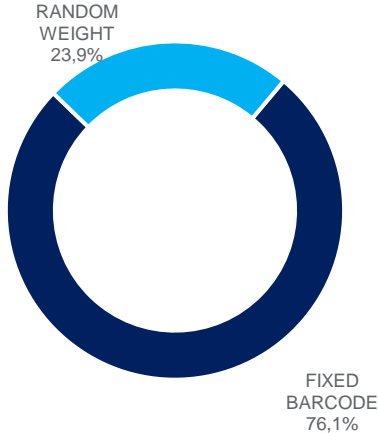
Value sales trend



Value Sales (in Millions)



2020 Value Contribution

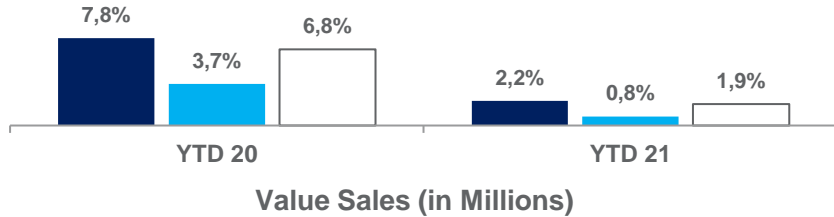


Source: IRI InfoScan, HM/SM + Random Weight, Year 2020

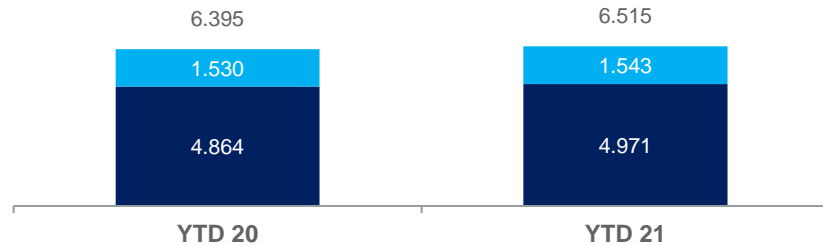
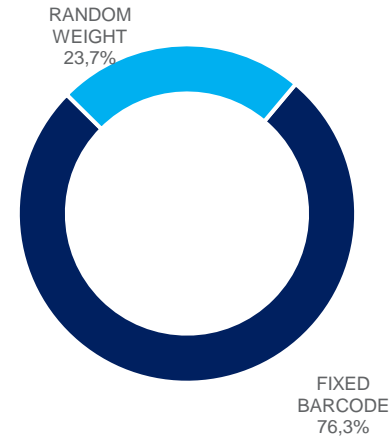
# Value Sales Increase for Total FMCG (1.9%) mainly coming from Fixed Barcodes

## Value sales trend

■ FB ■ RW □ TOTAL FMCG



## 2021 Value Contribution

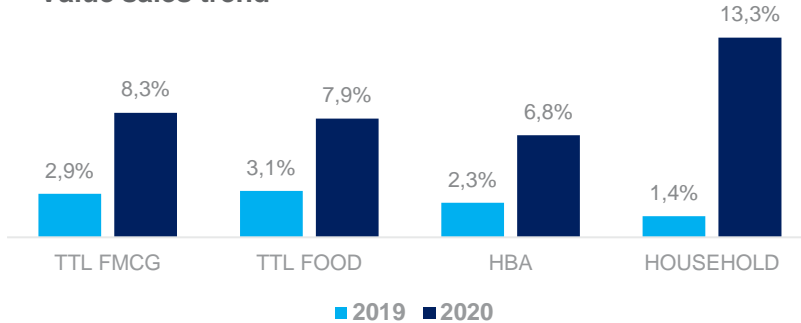


Source: IRI InfoScan, HM/SM + Random Weight, YTD October 21

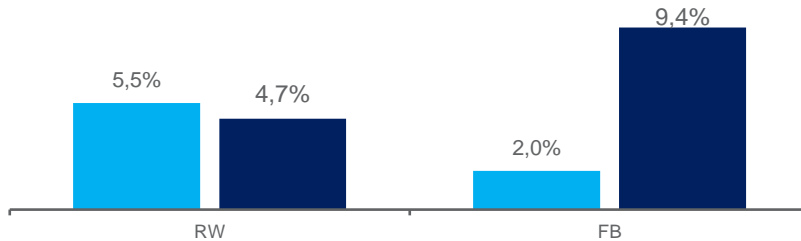


# Household is the Champion of 2020, due to Covid-19 existence

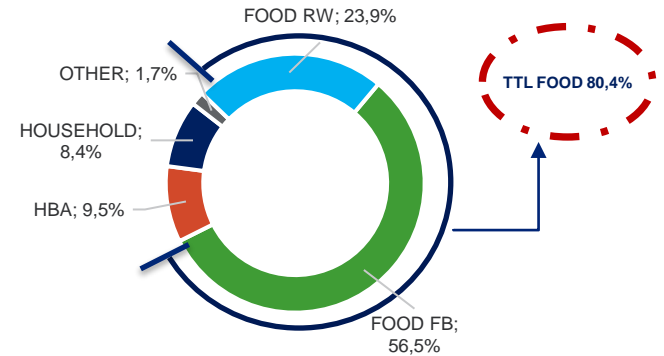
Value sales trend



Food sales trend



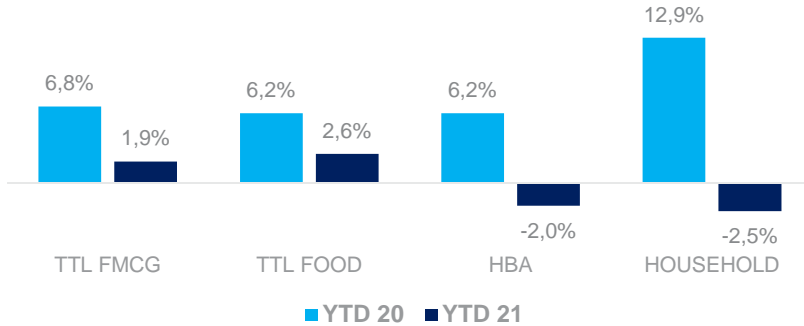
2020 Value Contribution



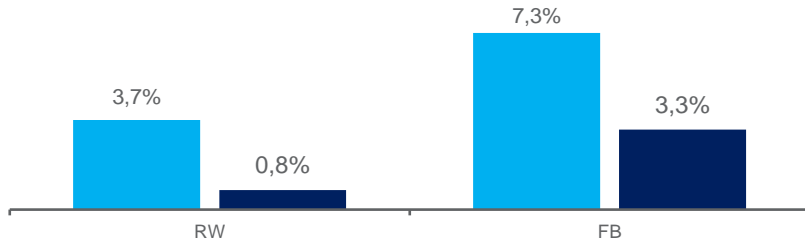
Source: IRI InfoScan, HM/SM + Random Weight, Year 2020

# Food is the only category with increasing sales in YTD 21

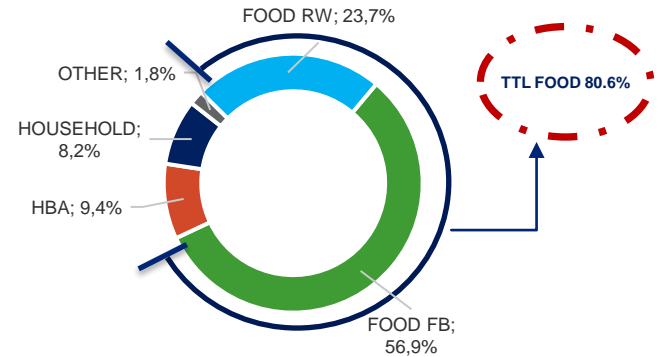
Value sales trend



Food sales trend



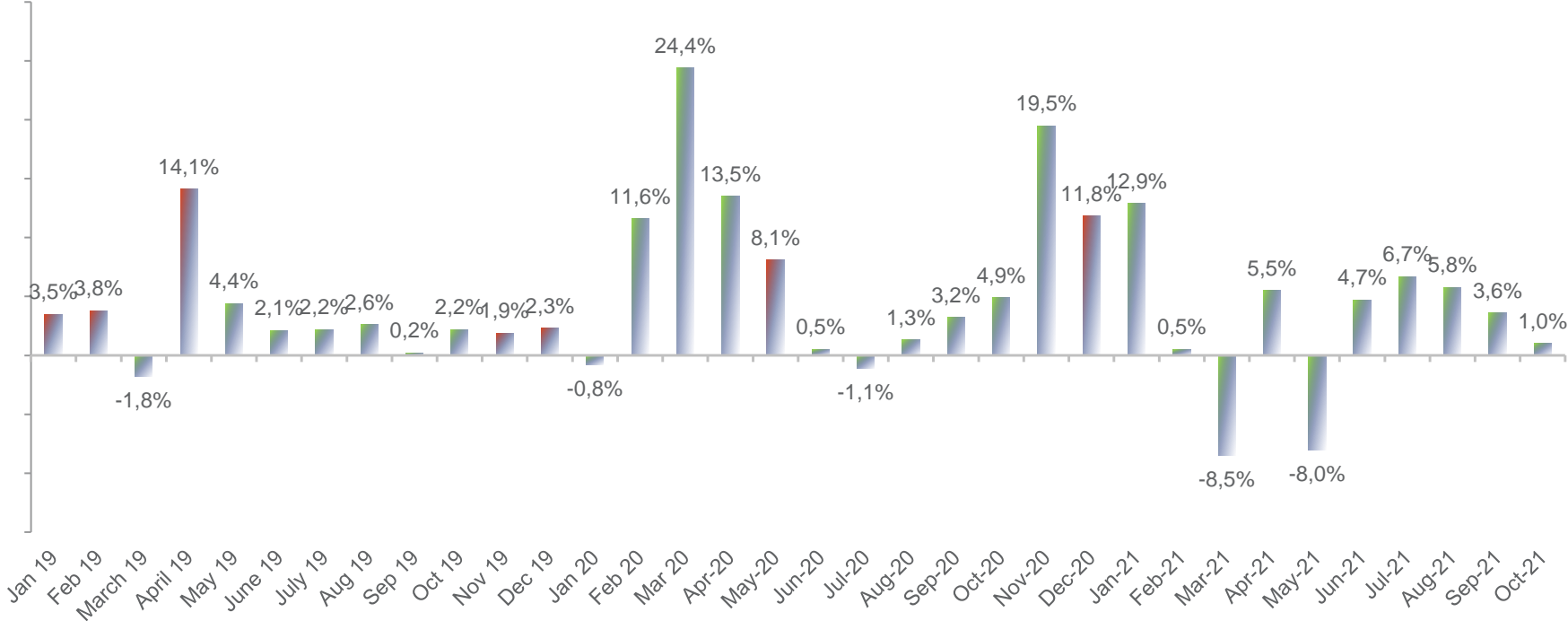
YTD 2021 Value Contribution



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

# October value sales increased by 1%

Total FMCG Value sales trend by month



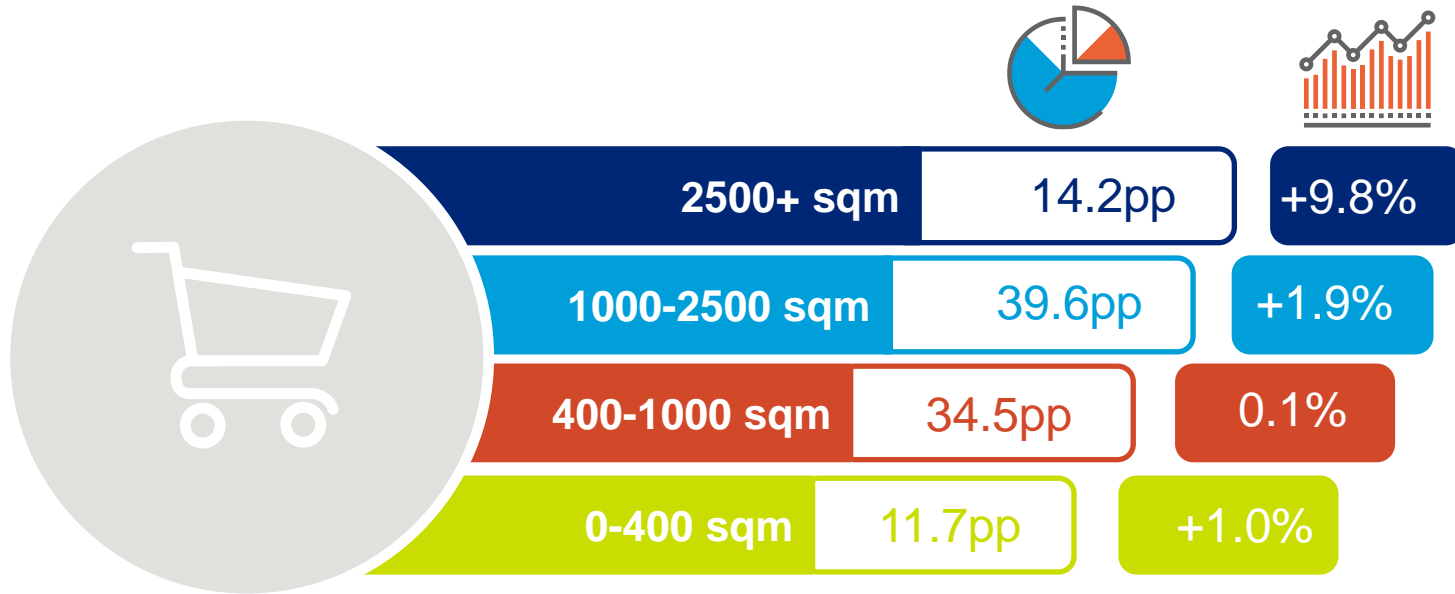
# 3

## RETAIL EXCLUDING RANDOM WEIGHT



# Exceptional performance for Hyper Markets in YTD

Value Contribution & Trends per shop type – YTD 21

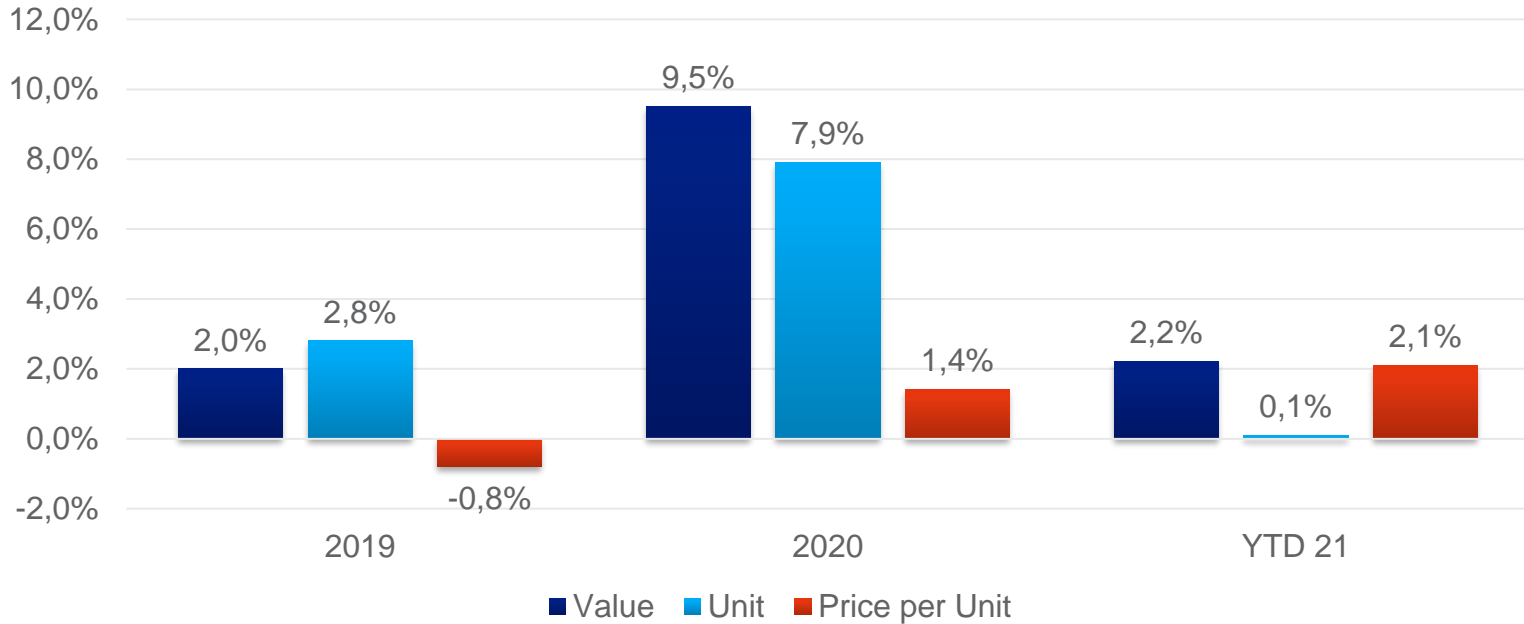


Source: IRI InfoScan, HM/SM, YTD October 21



## Increased prices in YTD by 2.1%

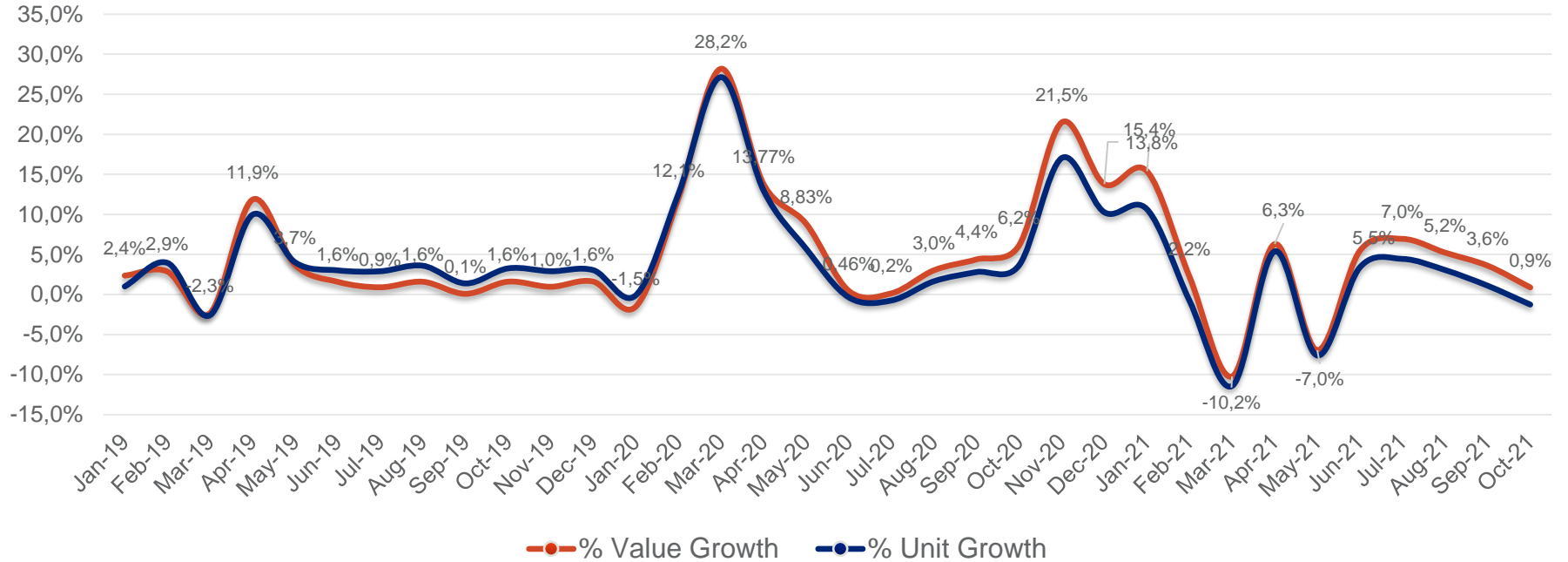
### HM/SM Sales and Price Trend



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

# Increased by 0,9% are the value sales of last month

## 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

## HM/SM Value Sales Trend

YTD 21



3.3%



-2.0%



-2.5%

Food

Health & Beauty

Household

2020



9.4%



6.8%



13.3%

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

# Slight Sales Increase for Food in YTD in terms of Units

## HM/SM Unit Sales Trend

YTD 21



+0.8%



-7.2%



-3.3%

Food

Health & Beauty

Household

2020



6.7%



16.9%



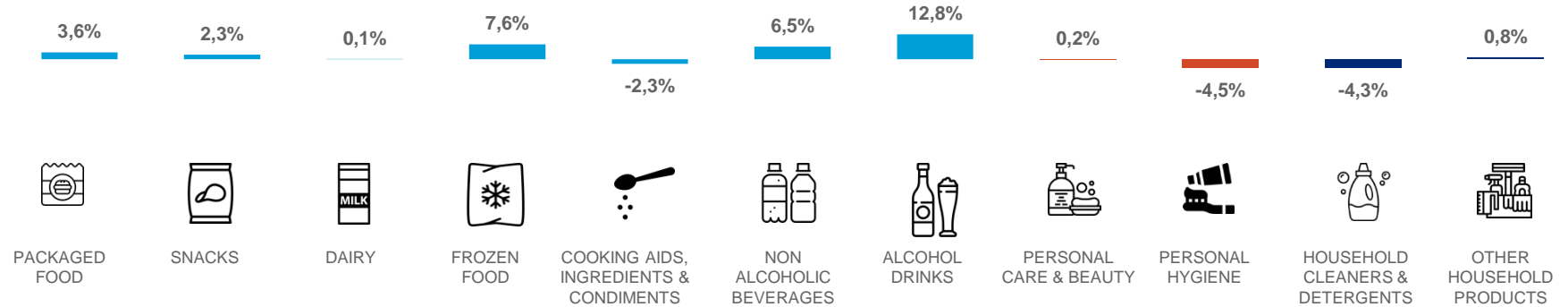
10.2%

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

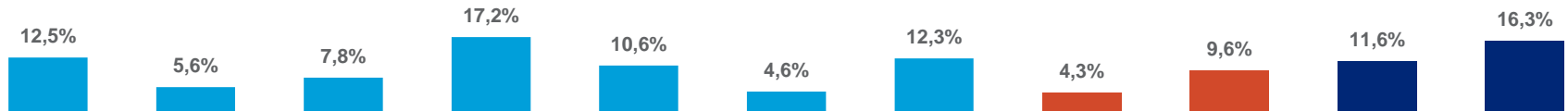


# Alcohol Drinks is the category with the most intense increase in YTD

## HM/SM Value Sales Trend YTD 21



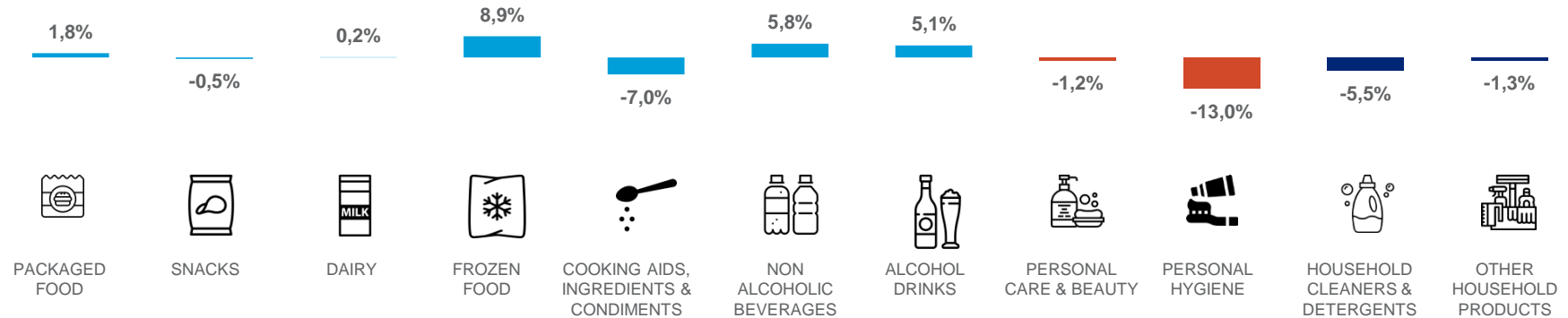
## HM/SM Value Sales Trend 2020



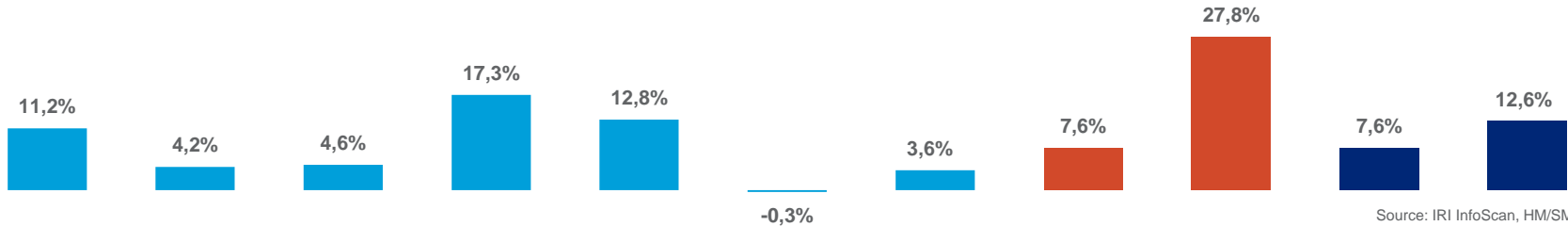
Source: IRI InfoScan, HM/SM, YTD October 21

# Frozen manages the highest increase in terms of Unit Sales in YTD

## HM/SM Unit Sales Trend YTD 21



## HM/SM Unit Sales Trend 2020



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

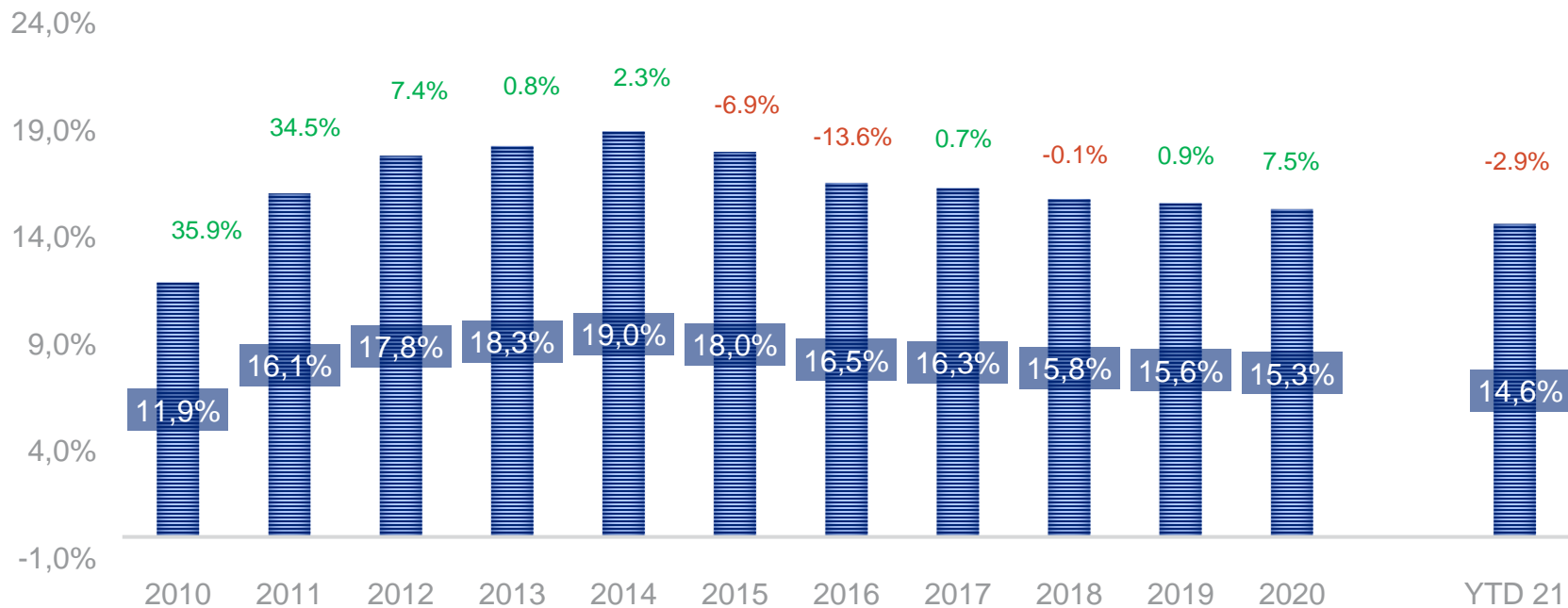
# 5

## EVOLUTION OF PRIVATE LABELS



## PL are declining during YTD

### PL Value Share and Trends in HM/SM





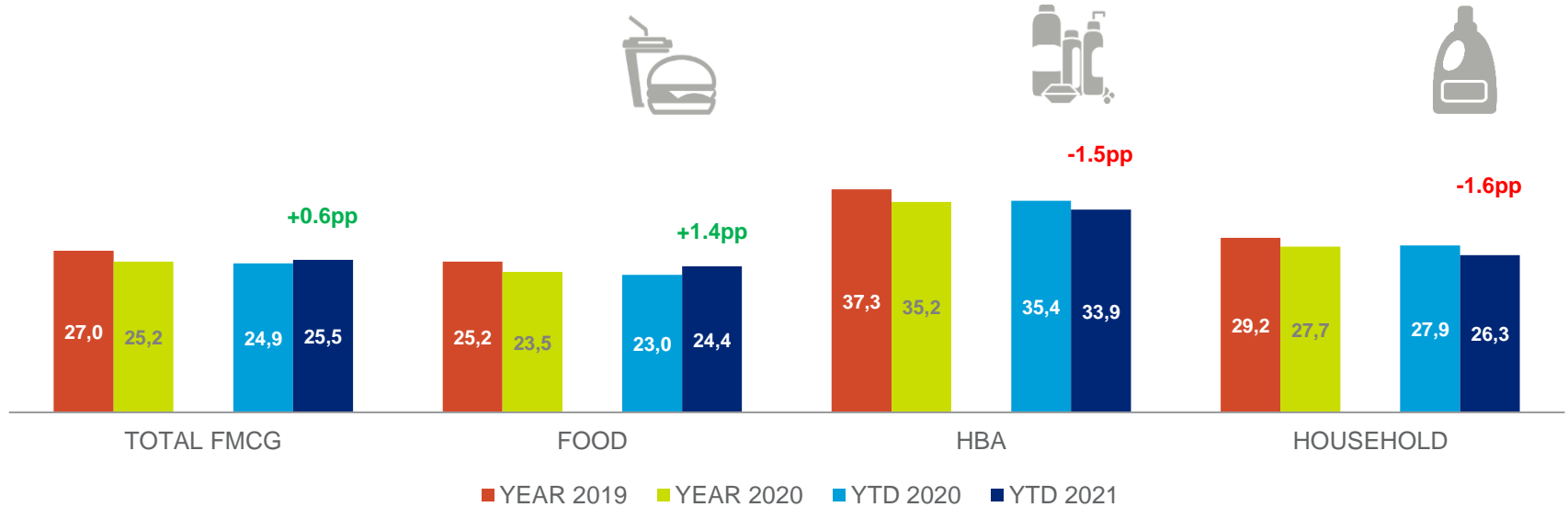
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# PRICE TRENDS – PROMO PRESSURE DUE TO TPR



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

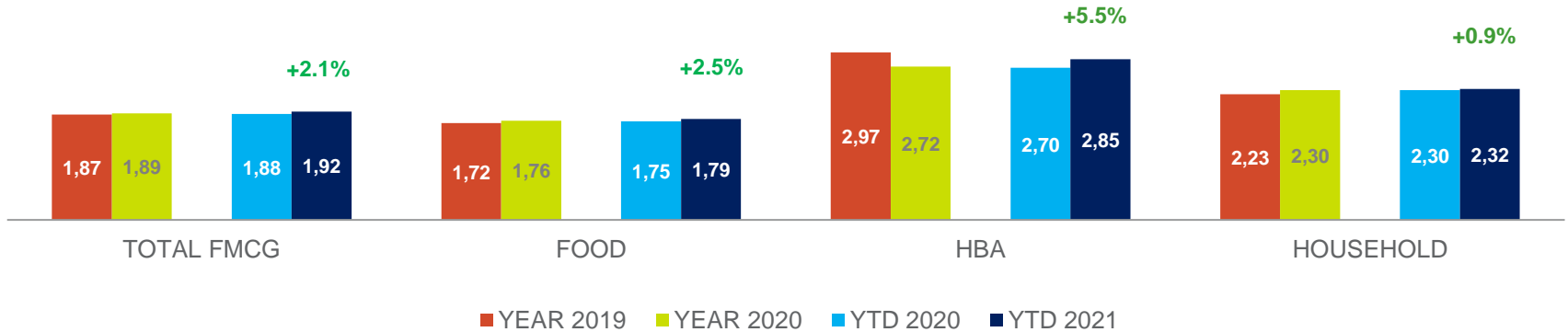
%Value Sales due to Temporary Price Reduction



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

# Increased prices in YTD for all 3 Giga Categories

Price per Unit per Giga Category



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

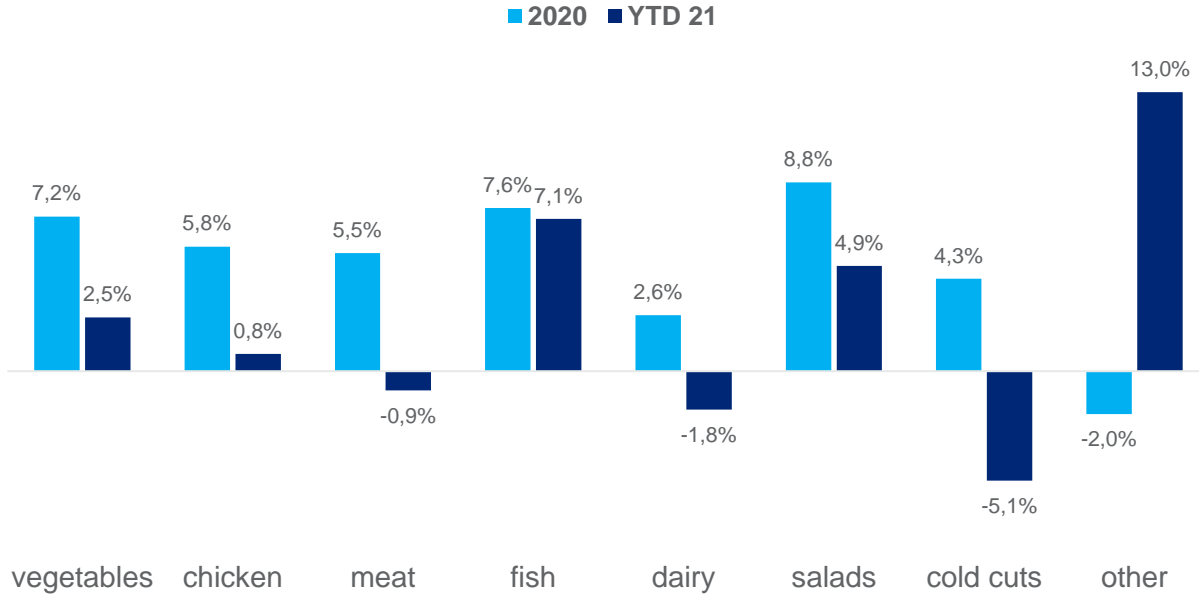
# 7

## RANDOM WEIGHT CATEGORIES CONTRIBUTION & GROWTH

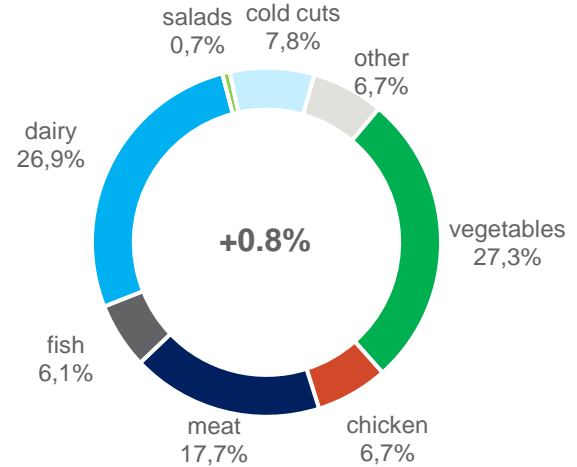


# Meat, Dairy and Cold Cuts are the Categories with reduced Value Sales in YTD

Random Weight Value sales trend



YTD 21 Contribution



Source: IRI Random Weight , YTD October 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

Follow us on Twitter: [@IRI\\_INTL](https://twitter.com/IRI_INTL)