

# Τάσεις Οργανωμένου Λιανεμπορίου Τροφίμων 2025

Περίοδος 2025: έως 26.10.25

11.10.2025

# NIQ



# Χαρακτηριστικά ανάλυσης

**Channels:** Food stores above 100m<sup>2</sup>

- Hypermarkets (>2.500m<sup>2</sup>)
- Large & Small Supermarkets (400-2.499m<sup>2</sup>)
- Superettes (100-399m<sup>2</sup>)
- **Online Sales Index:** Aggregation of online sales of E.Y.Sklavenitis, Group AB, Masoutis and ANEDIK/Kritikos

**Periods:**

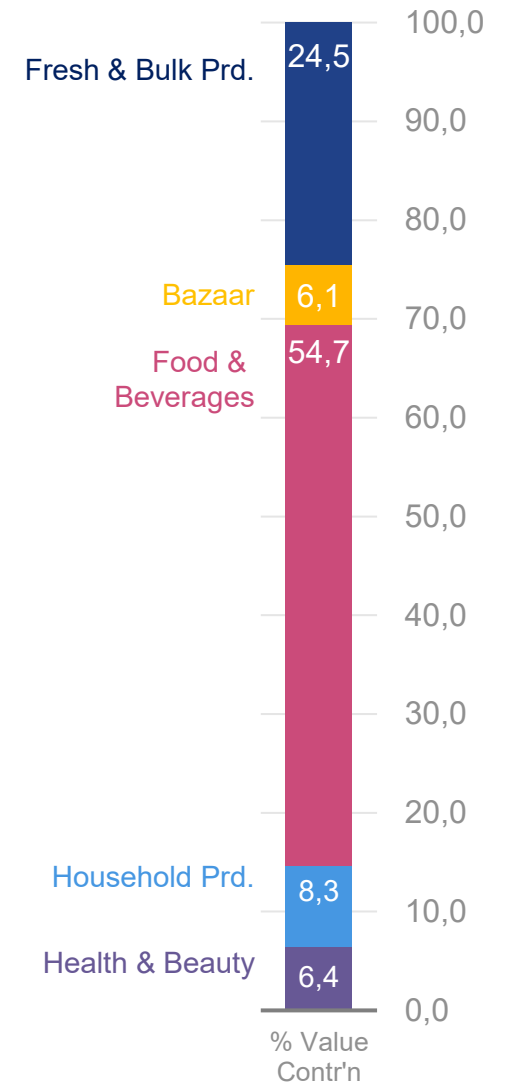
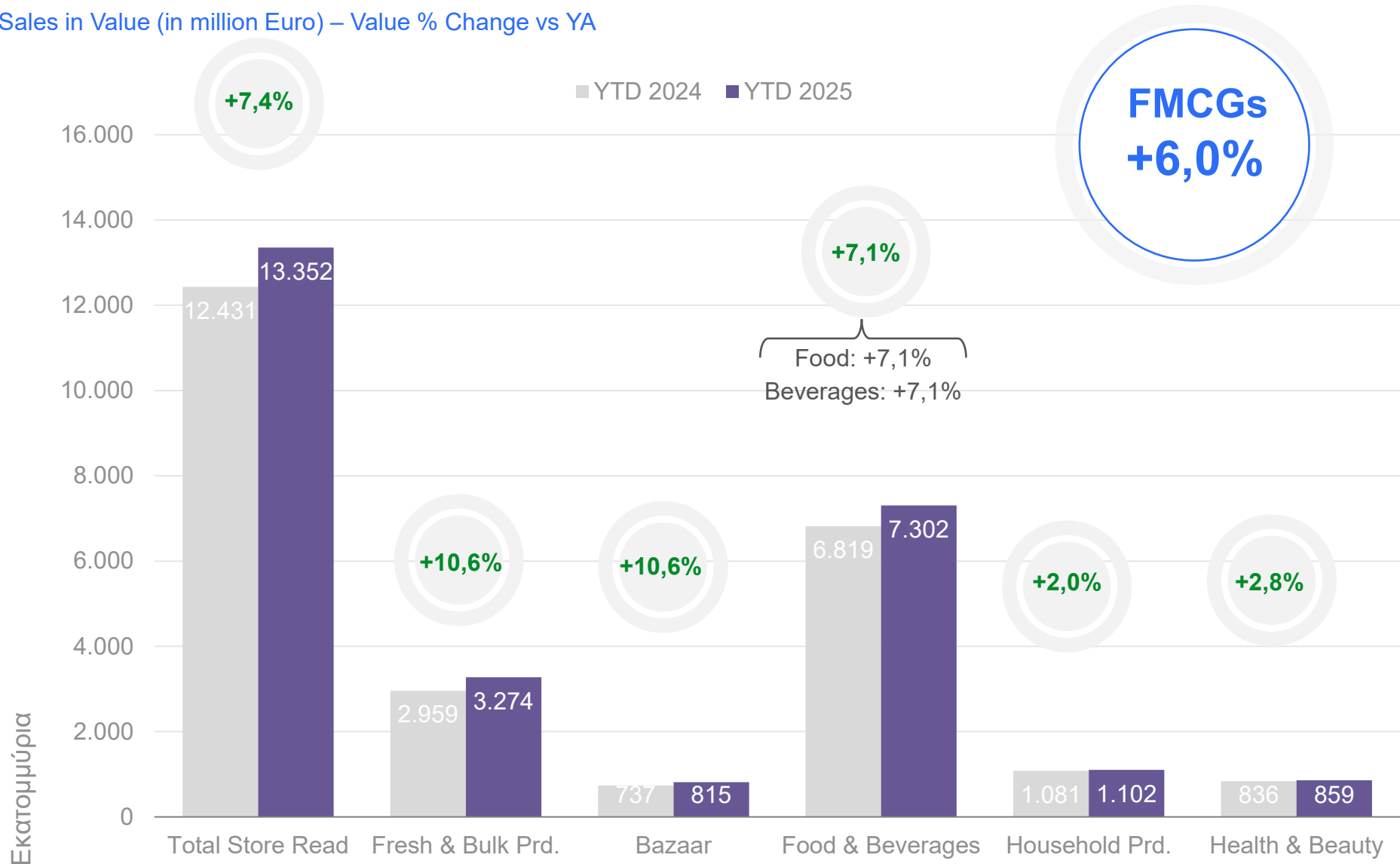
- December 30th ,2024 – October 26<sup>th</sup> ,2025 vs January 1st, 2024 – October 27<sup>th</sup> ,2024

**Products:** All products split into the following groups:

- Fresh Bulk Products (non-packaged bulk products, e.g. bulk Cheese, bulk Gammon, meat, fish, vegetables, non-packaged pastry/bakery products etc)
- Bazaar (non-FMCGs products, like Clothes, CDs/DVDs, Toys, Car accessories, Electronic Appliances etc)
- Food & Beverages (Pre-Packed Food – Fresh/Chilled/Frozen/Shelf Stable & Beverages – Alcoholic & Non-Alcoholic)
- Health & Beauty (Personal Care & Hygiene Products)
- Household Products (e.g. Detergents, Paper Products, Aluminum Foil, Household Cleaners etc)

# Εξέλιξη Αγοράς - Πωλήσεις σε αξία

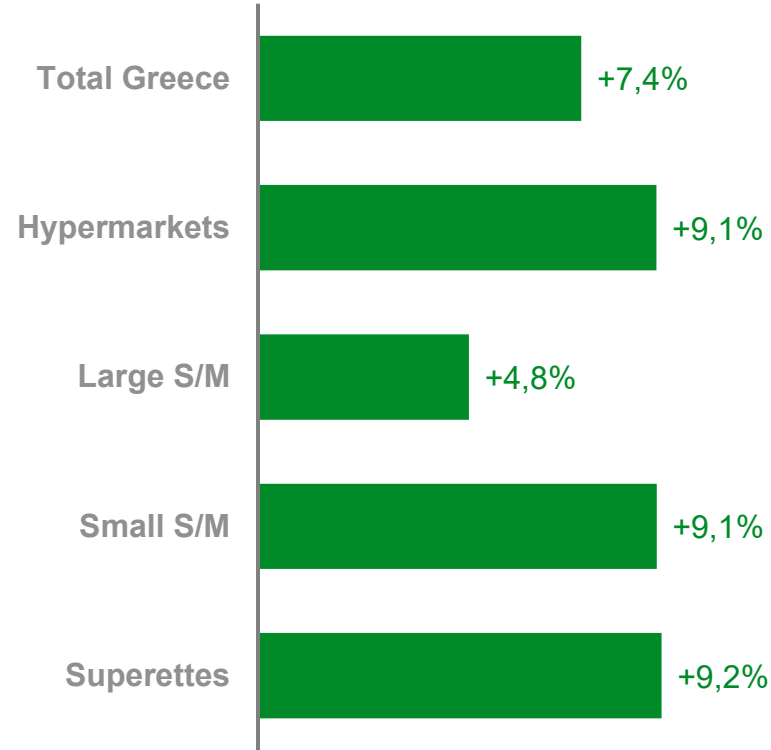
Sales in Value (in million Euro) – Value % Change vs YA



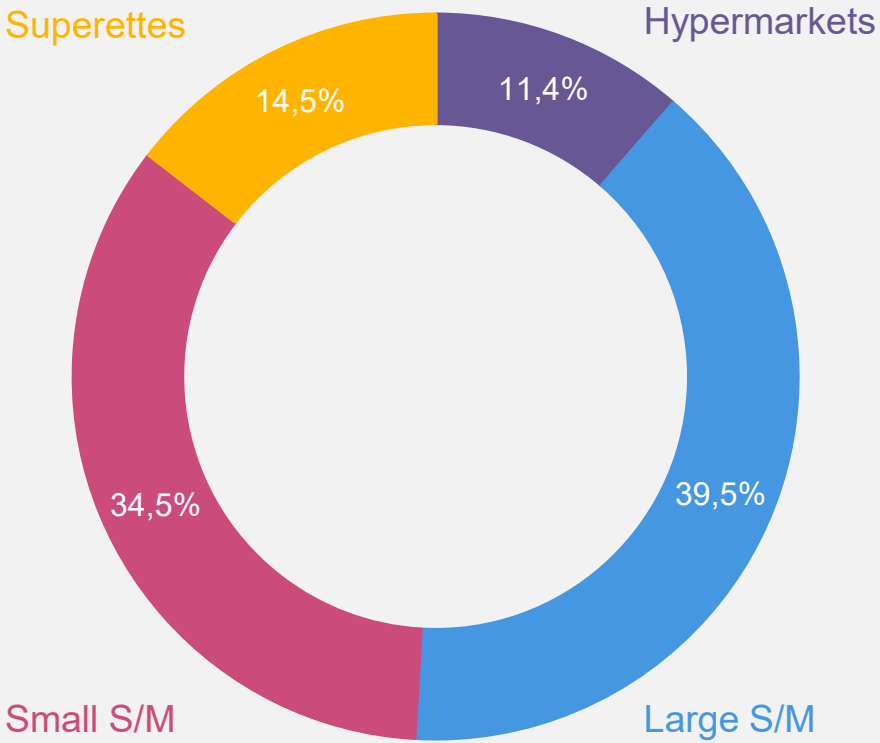
Source: ScanTrack Plus | Total Greece including Islands and Discounters | Reported period: YTD 26.10.25

# Εξέλιξη Πωλήσεων ανά Τύπο Καταστήματος

TSR – Store Types Value % Change vs YA



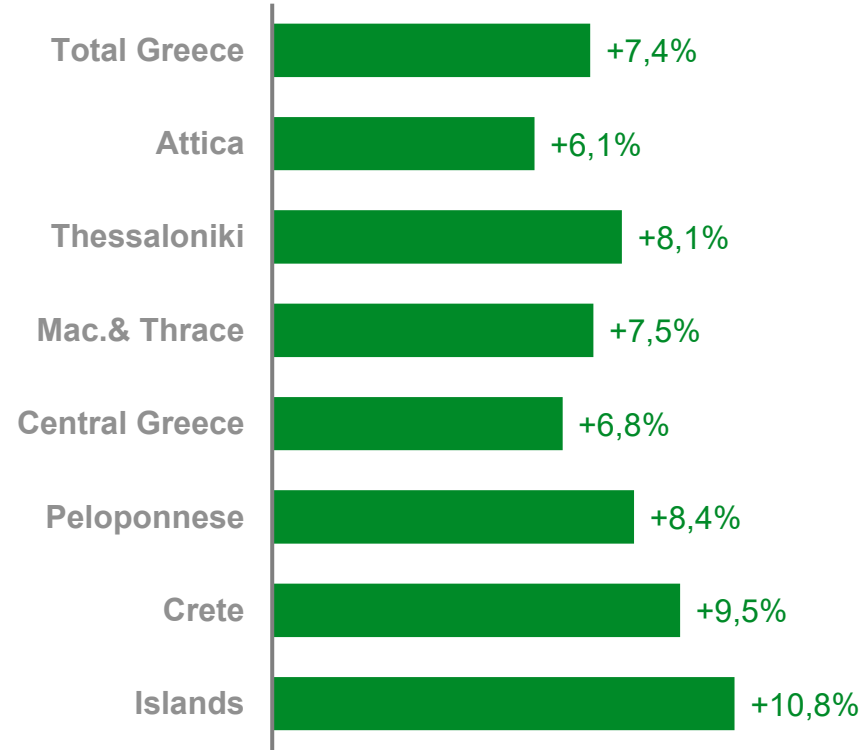
TSR – Store Type Value Contribution (in %)



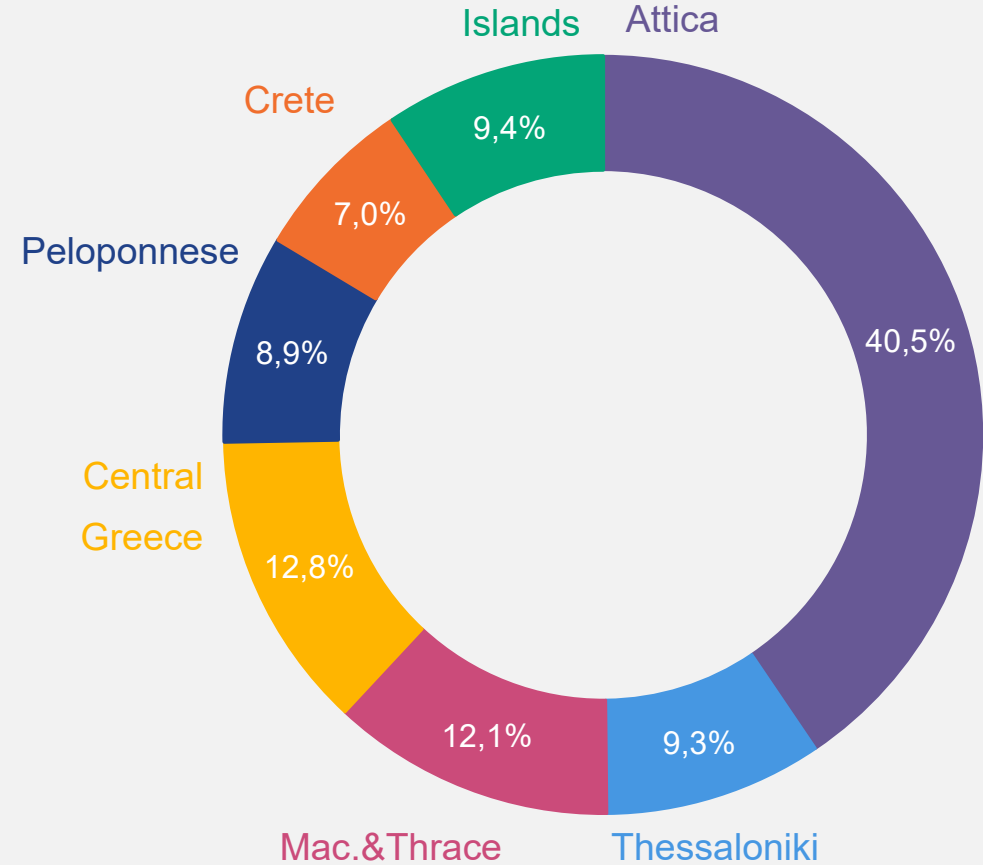
Source: ScanTrack Plus | Total Greece including Islands and Discounters | Reported period: YTD 26.10.25

# Εξέλιξη Πωλήσεων Ανά γεωγραφική Περιοχή

TSR – Regions Value % Change vs YA

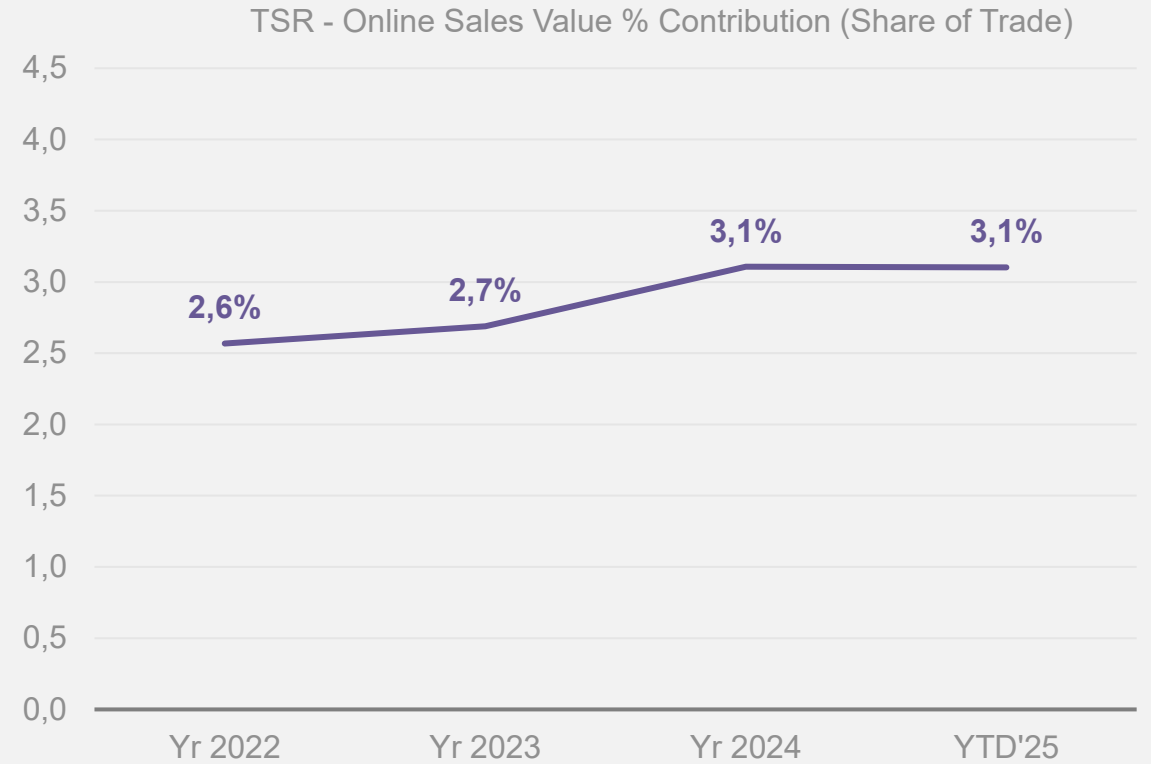
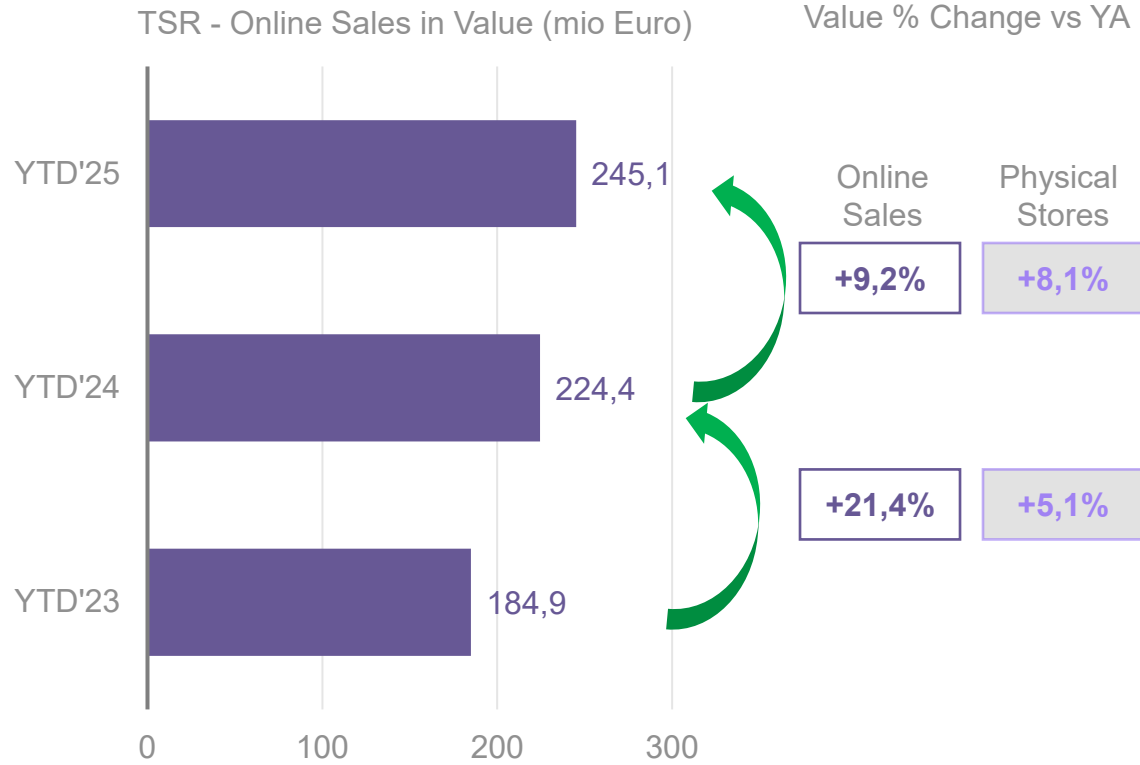


TSR – Regions Value Contribution (in %)



Source: ScanTrack Plus | Total Greece including Islands and Discounters | Reported period: YTD 26.10.25

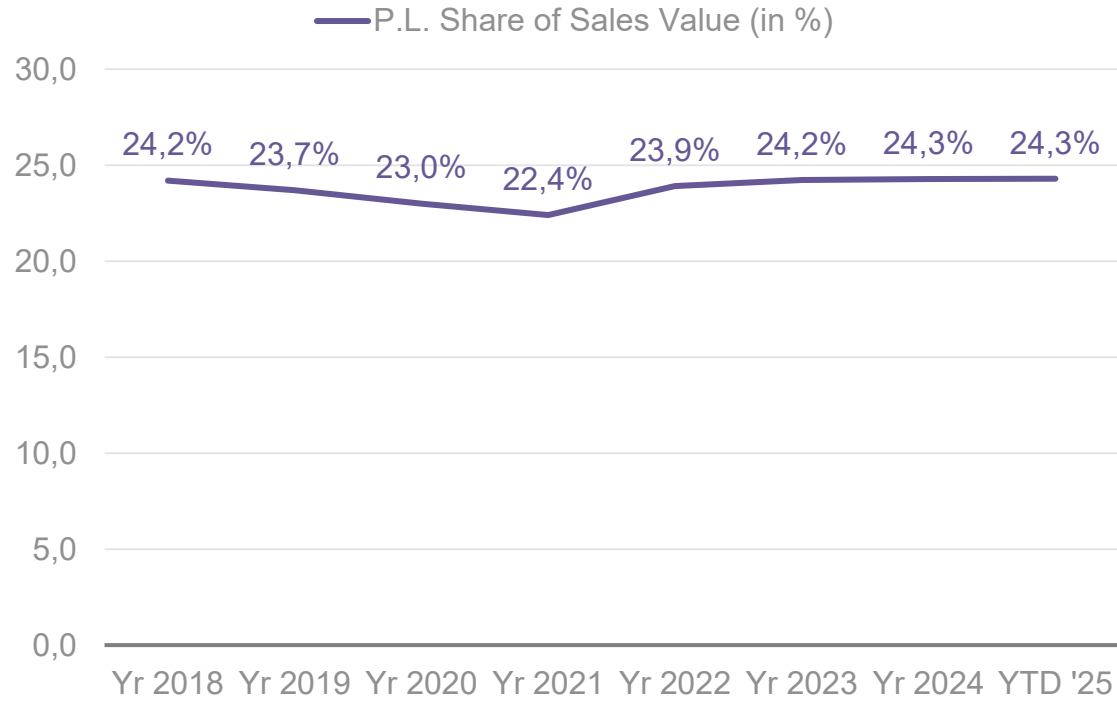
# Εξέλιξη Ηλεκτρονικών πωλήσεων (αγορά 4 λιανεμπόρων)



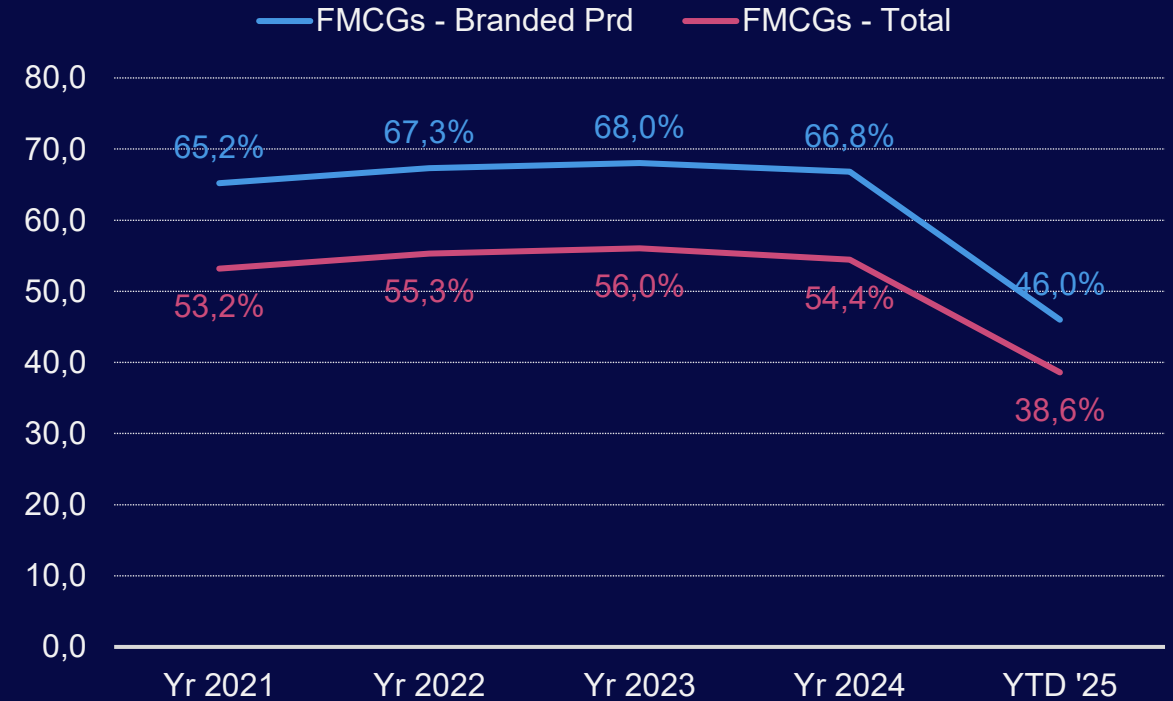
Source: ScanTrack Plus | Reported period: YTD 26.10.25 | Online Sales Index: Aggregation of online sales of E.Y.Sklavenitis, Group AB, Masoutis and ANEDIK/Kritikos | Benchmark: Total sales of the afore-mentioned retailers

# Προϊόντα Ιδ. Ετικέτας και Προωθητική Ένταση

Private Labels Market share evolution



FMCGs – Promo intensity evolution

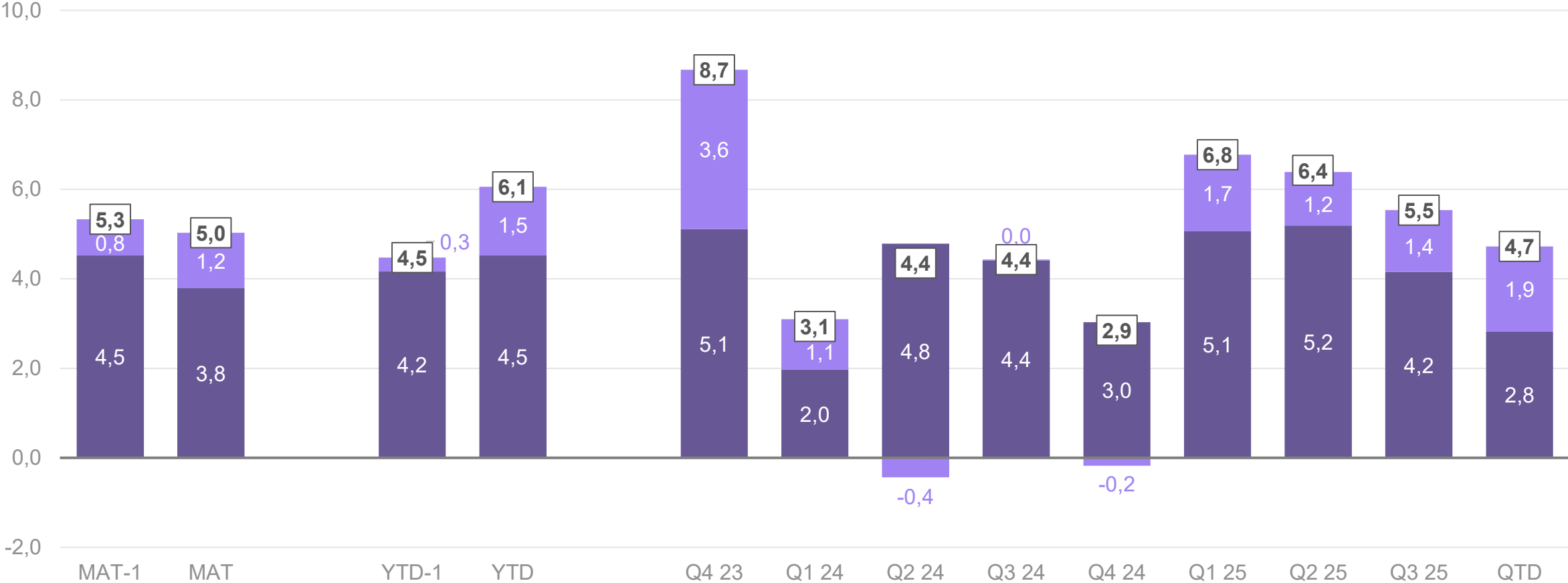


Source: ScanTrack Plus | Total Greece including Islands and Discounters | Reported period: YTD 26.10.25

# Ελλάδα- Αποδόμηση Τάσης ταχυκίνητων κατηγοριών 2025

Greece FMCGs\* –Decomposition of growth

■ Volume % Change vs YA    ■ Unit Value % Change vs YA    □ Nominal Growth %



Source: ScanTrack Plus | Total Greece including Islands and Discounters | Reported period: YTD 26.10.25

**Thank you**

**NIQ**