

ΠΣΒΑΚ 2023

Αγορά Supermarket 2022

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IRI Greece*



Η σημερινή μας συζήτηση

1. Εξέλιξη αγοράς Supermarket
2. Κατηγορίες προσωπικής φροντίδας και υγιεινής
3. Εξέλιξη προϊόντων ιδιωτικής ετικέτας (PL)
4. Στρατηγικές επιλογές

Εξέλιξη αγοράς Supermarket



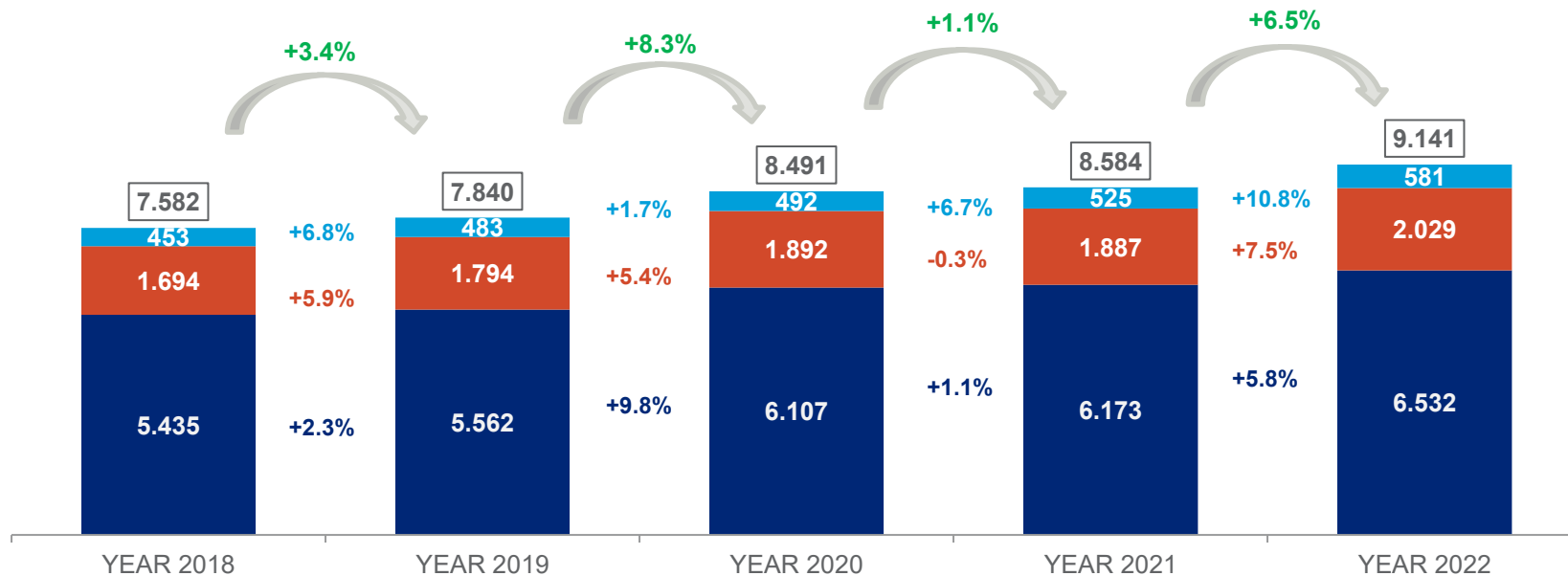
Αυξημένες πωλήσεις σε αξία +6,5% στο σύνολο Supermarket για το 2022

FMCG Value Sales in mio €

■ Fixed Barcodes SM/HM

■ Random SM/HM

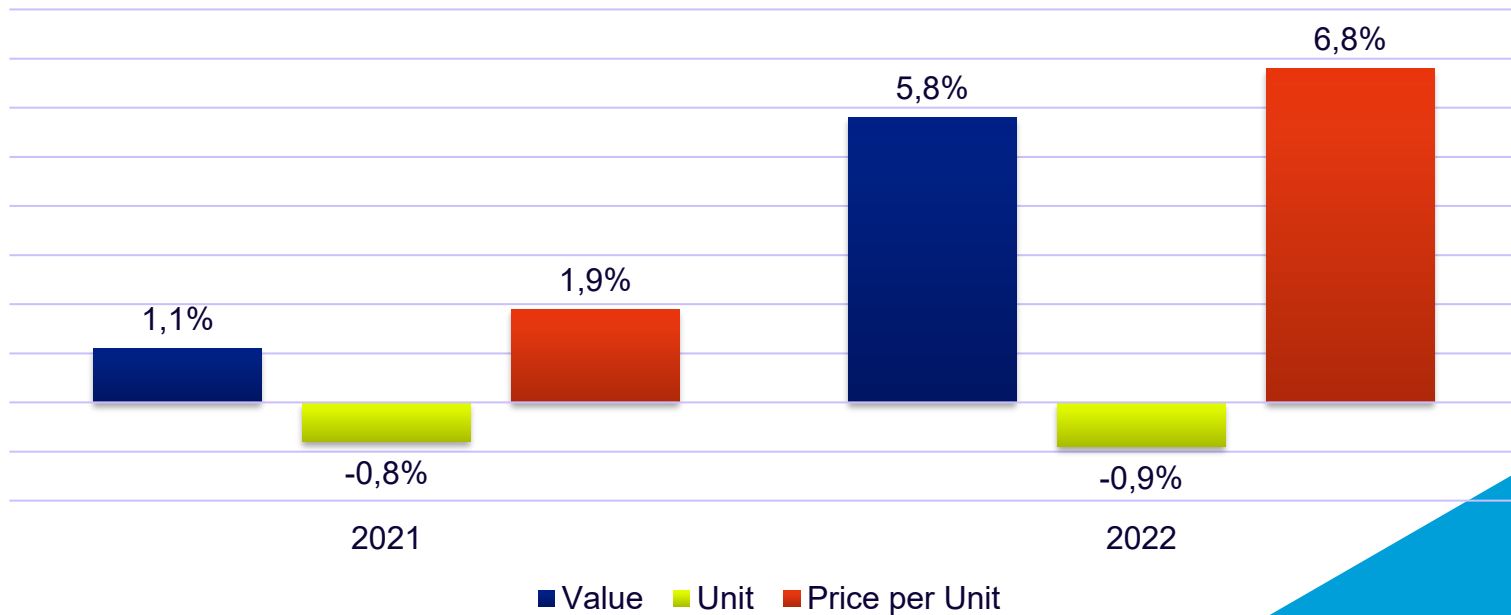
■ Islands SM/HM



Source: IRI InfoScan, HM/SM + Random Weight + Islands, Year 2022

Μέση αύξηση τιμών 6.8% στο σύνολο Supermarket

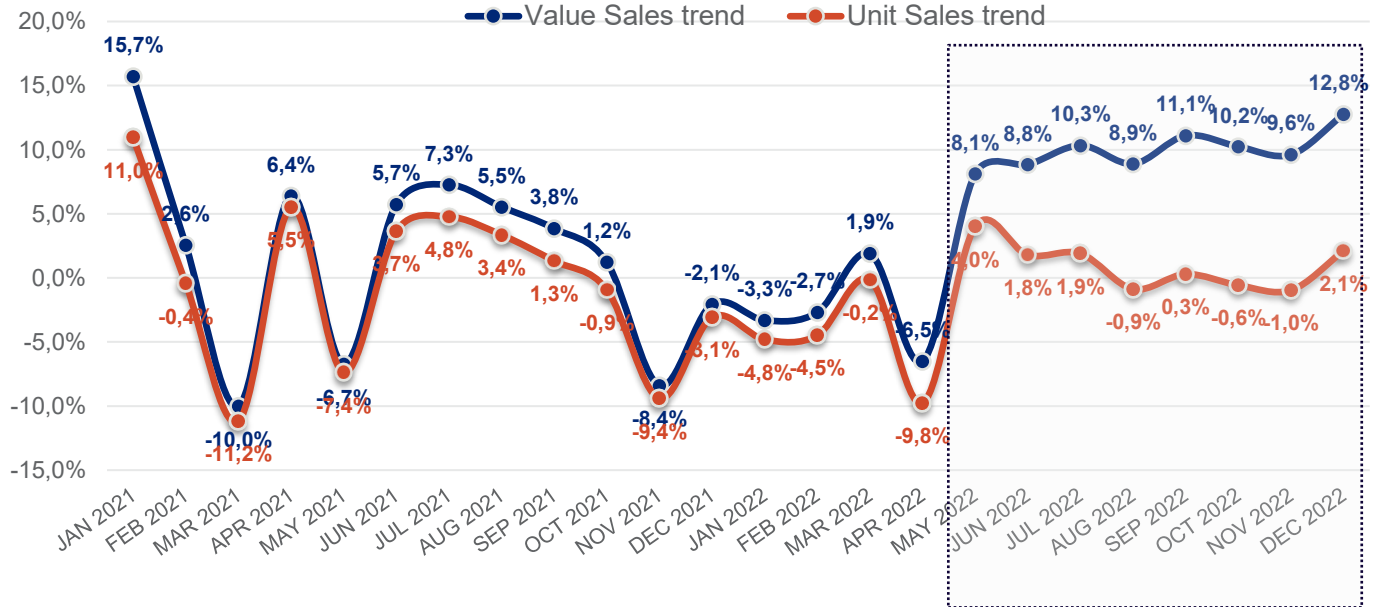
HM/SM Sales and Price Trend



Αύξηση ψαλίδας μεταξύ αξίας και τεμαχίων μετά τον Μάιο, λόγω εντονότερου πληθωρισμού

Total FMCG Monthly Sales Trends vs. Year Ago

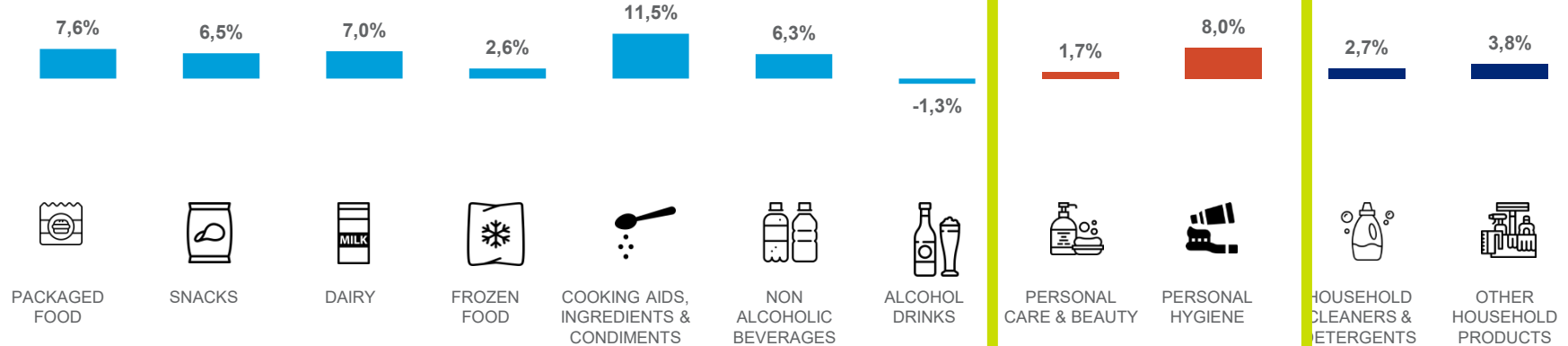
YR 2020: **+9.8%**
 YR 2021: **+1.1%**
 YR 2022: **+5.8%**



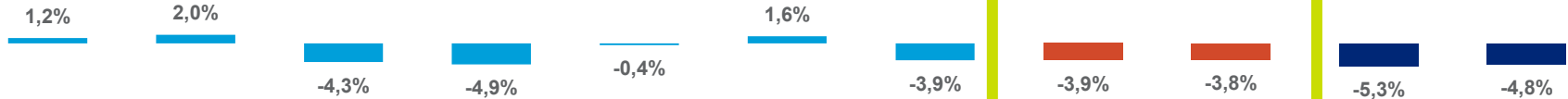
Source: IRI InfoScan, HM/SM, Year 2022

Αντίστοιχη η εικόνα στις επιμέρους «μεγαλο-κατηγορίες»

HM/SM Value Sales Trend 2022



HM/SM Unit Sales Trend 2022

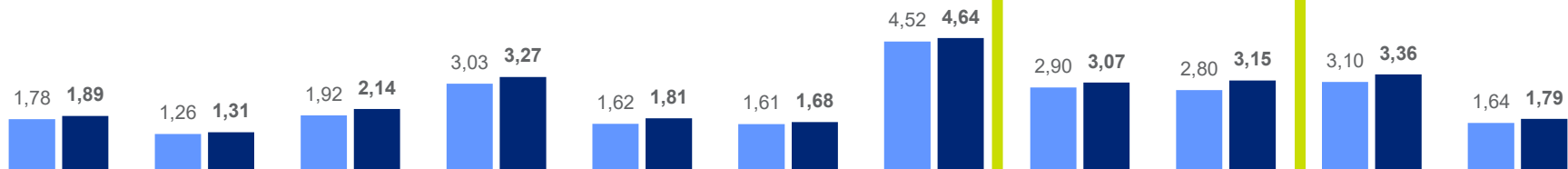


Source: IRI InfoScan, HM/SM, Year 2022

Αύξηση τιμών σε όλο το εύρος κατηγοριών

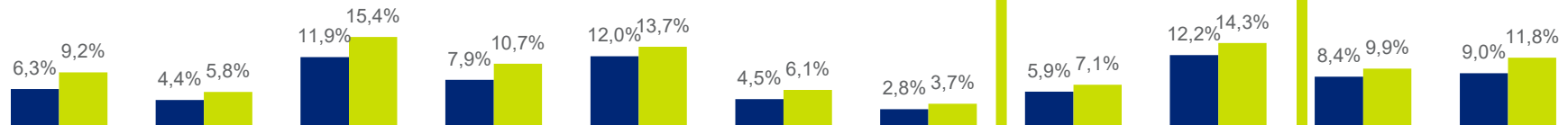
Price per Unit

■ YR 2021 ■ YR 2022



Price per Unit - Trend vs Year Ago

■ YR 2022 ■ May-Dec '22



Source: IRI InfoScan, HM/SM, Year 2022

Κατηγορίες προσωπικής φροντίδας και υγιεινής



Προσωπική φροντίδα και υγιεινή

Total Greece S.Markets

	Value Sales			Unit sales			Price per Unit		
	YEAR 2021	YEAR 2022	'22 VS '21	YEAR 2021	YEAR 2022	'22 VS '21	YEAR 2021	YEAR 2022	'22 VS '21
toilet_soaps	8.312.960	8.622.254	3,7%	7.380.965	7.070.940	-4,2%	1,13	1,22	8,3%
cream_soaps	22.540.128	20.241.659	-10,2%	12.189.188	10.725.641	-12,0%	1,85	1,89	2,1%
toothpastes	39.733.088	39.828.607	0,2%	18.168.781	17.591.650	-3,2%	2,19	2,26	3,5%
toothbrush	17.225.112	16.720.399	-2,9%	6.765.088	6.663.410	-1,5%	2,55	2,51	-1,4%
suncare	11.777.287	12.222.254	3,8%	1.607.254	1.621.333	0,9%	7,33	7,54	2,9%
shampoo	53.748.131	55.261.319	2,8%	16.802.465	15.974.504	-4,9%	3,20	3,46	8,1%
stylers	13.696.749	15.090.553	10,2%	4.120.050	4.227.097	2,6%	3,32	3,57	7,4%
facial_care	26.407.161	28.878.046	9,4%	6.991.759	7.505.036	7,3%	3,78	3,85	1,9%
deodorants	36.539.197	39.999.167	9,5%	13.291.119	13.591.463	2,3%	2,75	2,94	7,1%
hair colorants	24.545.170	23.284.826	-5,1%	6.041.516	5.494.315	-9,1%	4,06	4,24	4,3%
bath_shower	39.805.029	42.196.741	6,0%	13.986.589	13.590.450	-2,8%	2,85	3,10	9,1%
hand&body	15.305.581	14.714.474	-3,9%	4.946.161	4.555.590	-7,9%	3,09	3,23	4,4%
shaving foams	6.239.489	6.577.924	5,4%	2.146.525	2.095.731	-2,4%	2,91	3,14	8,0%
conditioners	22.631.430	22.601.097	-0,1%	6.734.188	6.191.978	-8,1%	3,36	3,65	8,6%
female razors	7.667.132	7.483.697	-2,4%	1.967.650	1.945.764	-1,1%	3,90	3,85	-1,3%
mouthwash	8.489.914	7.514.509	-11,5%	2.158.713	1.845.670	-14,5%	3,93	4,07	3,5%
cottons_demakeup	4.904.216	5.203.295	6,1%	3.348.524	3.013.505	-10,0%	1,46	1,73	17,9%
after shave	2.732.393	2.559.225	-6,3%	495.456	433.395	-12,5%	5,51	5,91	7,1%
depilatories	5.351.032	4.832.400	-9,7%	1.104.946	1.004.009	-9,1%	4,84	4,81	-0,6%
colognes_perfumes	3.371.892	3.211.785	-4,7%	471.886	435.870	-7,6%	7,15	7,37	3,1%
male razors	22.967.568	23.778.217	3,5%	5.022.537	4.875.059	-2,9%	4,57	4,88	6,7%
baby colognes	37.634	28.731	-23,7%	5.155	3.968	-23,0%	7,30	7,24	-0,8%

Προσωπική υγιεινή

Total Greece S.Markets

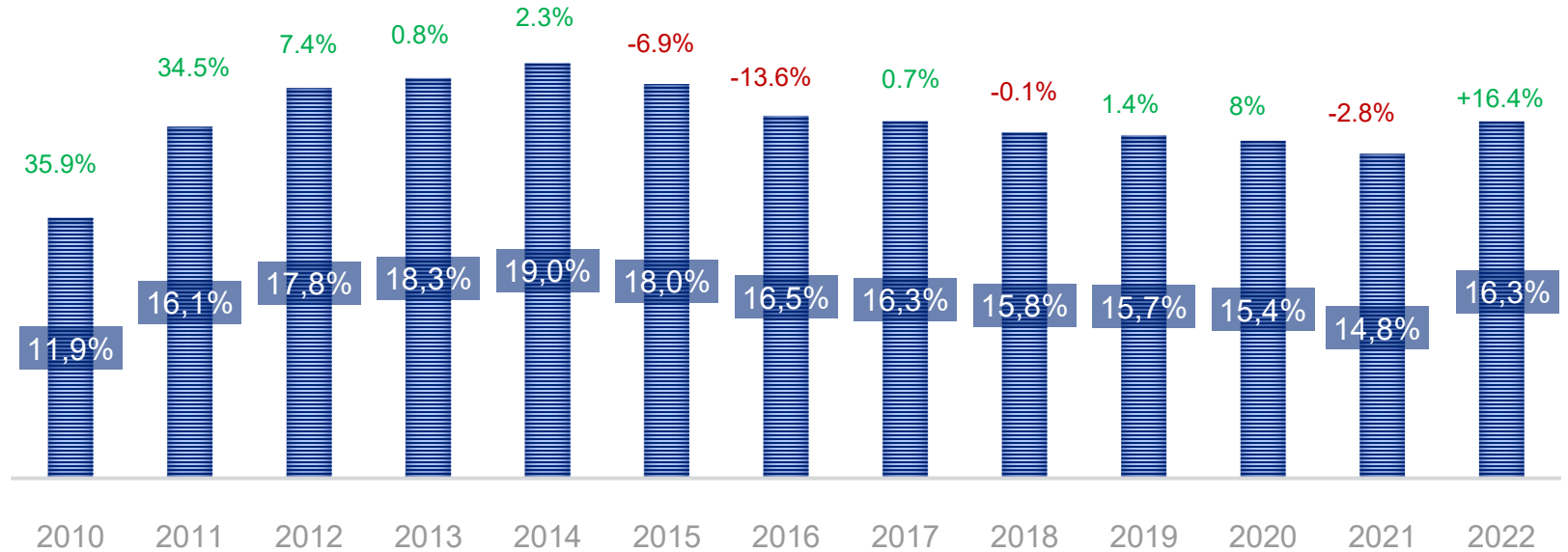
	Value Sales			Unit sales			Price per Unit		
	YEAR 2021	YEAR 2022	'22 VS '21	YEAR 2021	YEAR 2022	'22 VS '21	YEAR 2021	YEAR 2022	'22 VS '21
sanitary_products	56.240.147	61.892.426	10,1%	25.139.564	25.230.259	0,4%	2,24	2,45	9,7%
pocket tissues	3.352.497	4.941.249	47,4%	3.373.948	4.213.857	24,9%	0,99	1,17	18,0%
total toilet_paper	93.806.991	111.727.925	19,1%	29.659.360	30.359.485	2,4%	3,16	3,68	16,4%
baby napkins	49.020.132	51.816.548	5,7%	5.194.975	4.863.807	-6,4%	9,44	10,65	12,9%
baby wipes	45.302.953	46.180.398	1,9%	16.913.134	17.637.542	4,3%	2,68	2,62	-2,2%
incontinence products	49.204.308	54.512.404	10,8%	8.885.856	9.193.557	3,5%	5,54	5,93	7,1%
antibacterial_wipes	17.667.013	13.548.793	-23,3%	14.241.150	9.244.878	-35,1%	1,24	1,47	18,1%
facial_tissues	8.929.288	10.772.424	20,6%	8.606.111	9.112.944	5,9%	1,04	1,18	13,9%
cotton buds	4.315.660	5.340.819	23,8%	4.860.068	4.777.423	-1,7%	0,89	1,12	25,9%
baby powders	677.250	726.017	7,2%	311.786	303.503	-2,7%	2,17	2,39	10,1%
condoms	8.873.171	8.452.588	-4,7%	906.824	815.975	-10,0%	9,78	10,36	5,9%
antibacterial gel	12.525.758	8.036.622	-35,8%	6.708.697	4.364.025	-34,9%	1,87	1,84	-1,4%

Εξέλιξη προϊόντων ιδιωτικής ετικέτας (PL)



Διαχρονική συμμετοχή προϊόντων PL

PL Value Share and Trends in HM/SM



Source: IRI InfoScan, HM/SM, Year 2022

Αλλαγές στην αντίληψη των καταναλωτών για τα PL

■ Better than National Brands ■ Same as National Brands



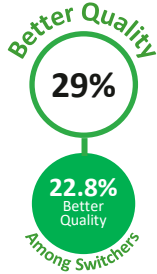
Innovative



Drivers
Plant-based Foods, 'Natural'
Organic or 'Bio' Laundry



Quality



Drivers
'White Label Quality'
Performance / Taste



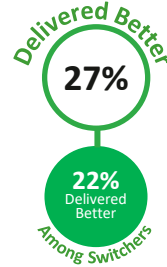
Trusted



Drivers
Retailer Brand Equity
Clear Ingredients & Labels



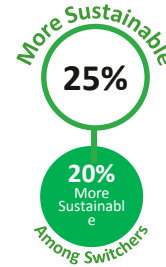
Delivers Claims



Drivers
Clear Product Claims
Consistent Quality



Sustainable



Drivers
Recycled Packaging
Fairtrade, Local Sourcing



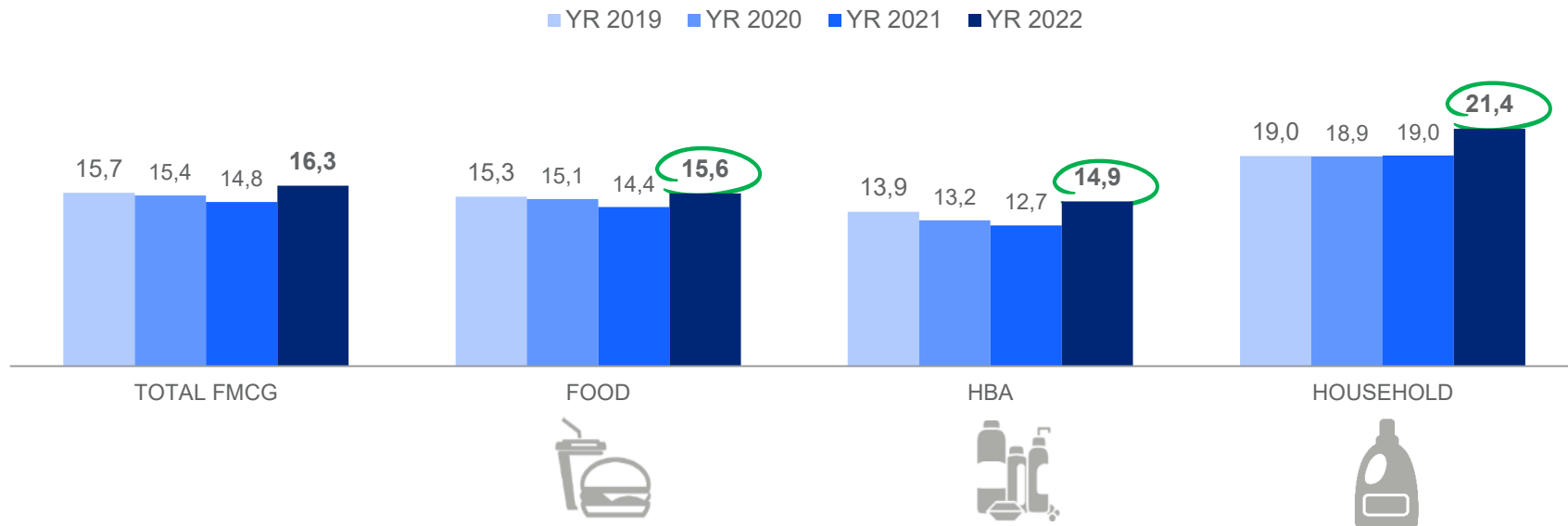
Good Image



Drivers
Availability, Range
Good Quality, Transparent
Prices

Αντίστοιχα στις «γίγαντο-κατηγορίες»

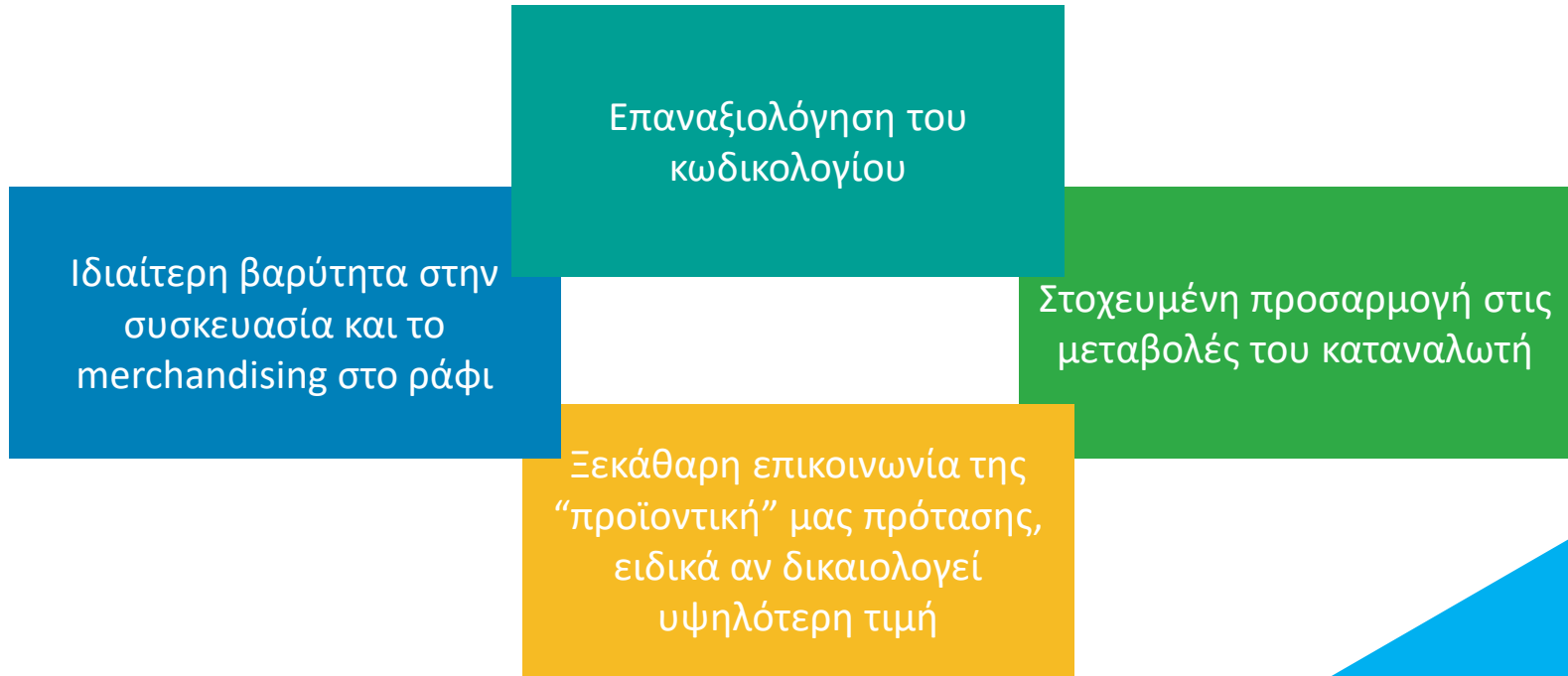
PL Value Share per Giga Category



Στρατηγικές επιλογές



Προτεινόμενες δράσεις



THANK YOU

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