

Country: Greece

COVID-19: Affecting the FMCG Sales



Periods Analyzed:

w.e. 01.03.20 vs 03.03.19

w.e. 08.03.20 vs 10.03.19



Source: IRI InfoScan, HM/SM + Bazaar (Mainland & Crete)/
Random Weight not Included

YTD sales review & COVID-19 effect taking into account Clean Monday sales uplift

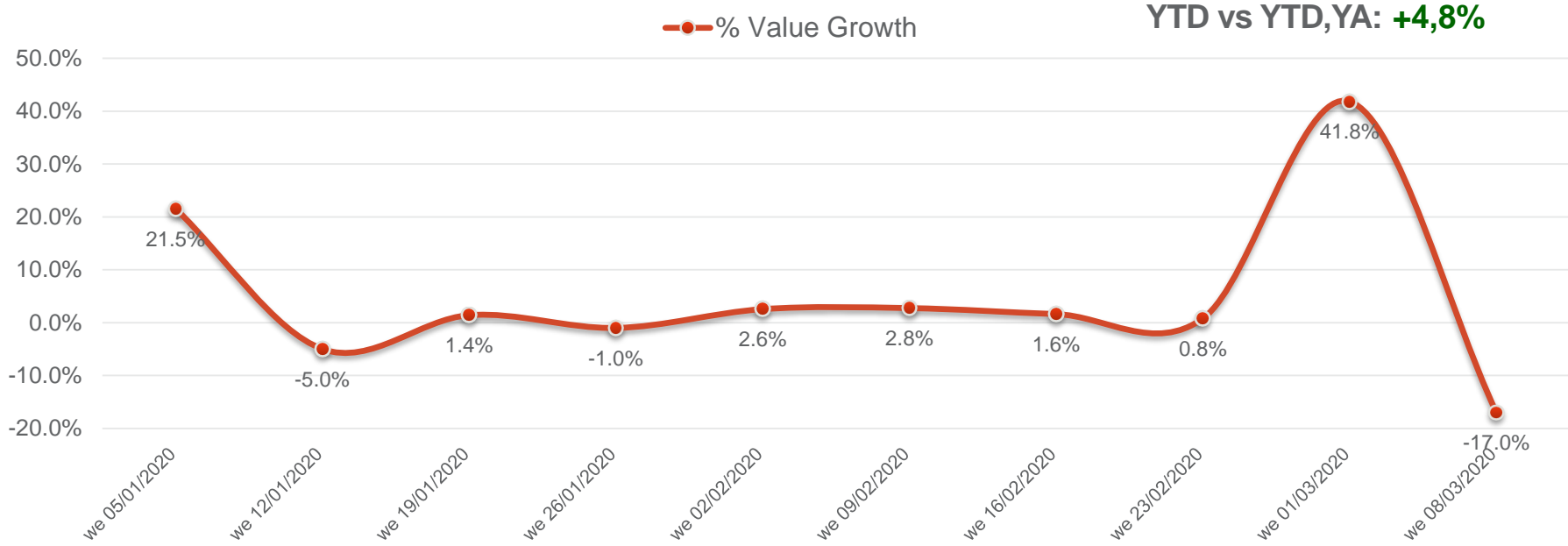
uplift in sales – depicted vividly when comparing the weeks before & after Clean Monday

Period	Growth
YTD vs YTD, YA	4.8%
we 01/03/2020 vs we 03/03/2019	41.8%
we 08/03/2020 vs we 10/03/2019	-17.0%
we 01/03/2020 (bef. CM '20) vs we 10/03/2019 (bef. CM '19)	35.9%
we 08/03/2020 (starting CM '20) vs we 17/03/2019 (starting CM '19)	5.5%
Ttl 2 weeks (01/03/2020 + 08/03/2020) vs (10/03/2019 + 17/03/2019)	22.5%

- Comparing **calendar weeks** we observe **41.8% uplift** in 1st week of March (we 01/03/2020) and **-17.0% drop** in 2nd week of March (we 08/03/2020)
- **Household & HBA** seem to lead the growth during Covid -19 Period
- Comparing seasonality of 2 weeks (before and after **CM vs YA**) , we observe a **22.5% sales uplift in total**

Weekly Value Sales Trends for SM/HM 2020

HM/SM Weekly Value Trends (calendar weeks comparison)



Total FMCG Sales increased by 11,9% in total for 2 consecutive weeks vs Year Ago

(01.03.20 +08.03.20) vs (03.03.19 +10.03.19)

340
FMCG
CATEGORIES

Food	Household	Personal Care / Hygiene	All Others
168	41	45	86
+8,8%	+25,0%	+27,4%	-2,1%

2019

Week Ending
03.03 + 10.03



2020

YTD
01.03 + 08.03

243,94€ Ms



272,89€ Ms

Total FMCG industry: **+11,9%**

Total FMCG Sales increased by 41,8% for the we 01.03.20

01.03.20 vs 03.03.19

340
FMCG
CATEGORIES

Food	Household	Personal Care / Hygiene	All Others
168	41	45	86
+42,1%	+48,2%	+52,4%	+11,2%

Week Ending
03.03.19



Week Ending
01.03.20

119,34€ Ms

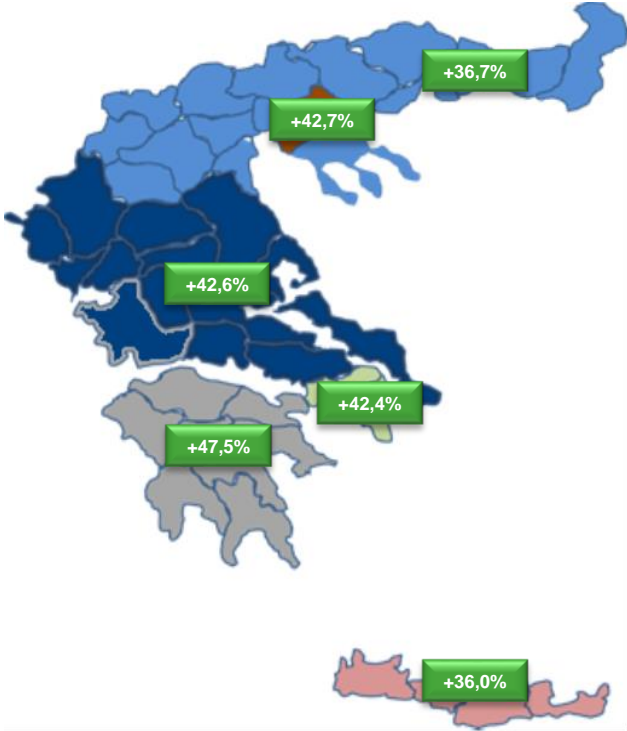


169,41€ Ms

Total FMCG industry: **+41,8%**

Areas value growths and contributions : Pel/sos managed the highest increase in sales

01.03.20 vs 03.03.19



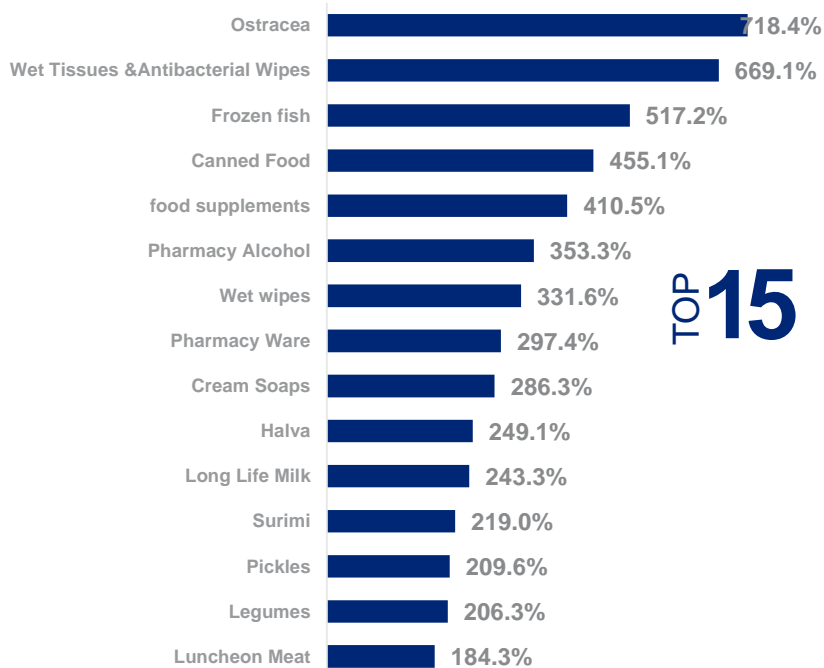
Areas Contribution 01.03.20

Total Greece	169,41€ Ms
Attica	55,1%
Salonica	10,4%
Center	13,0%
North	8,6%
Pel/Sos	7,4%
Crete	5,6%

COVID-19 impact on FMCG value sales for major categories

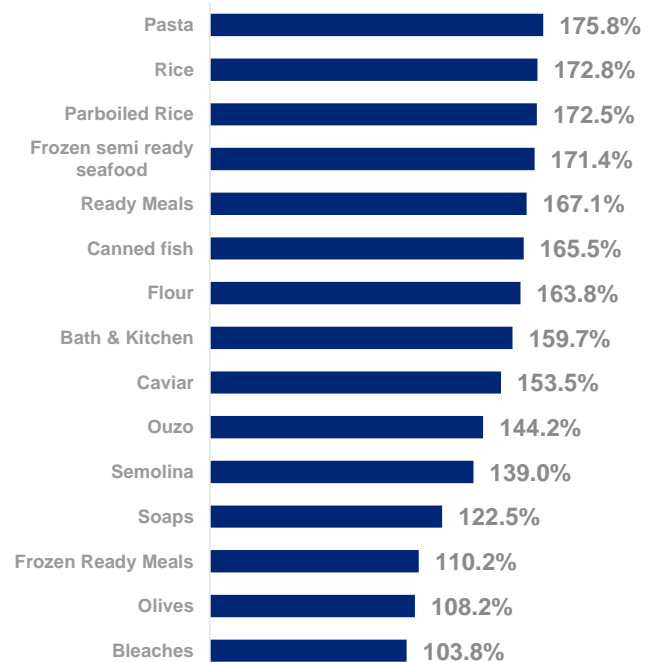
01.03.20 vs 03.03.19

Best Selling 1st - 15th



TOP 15

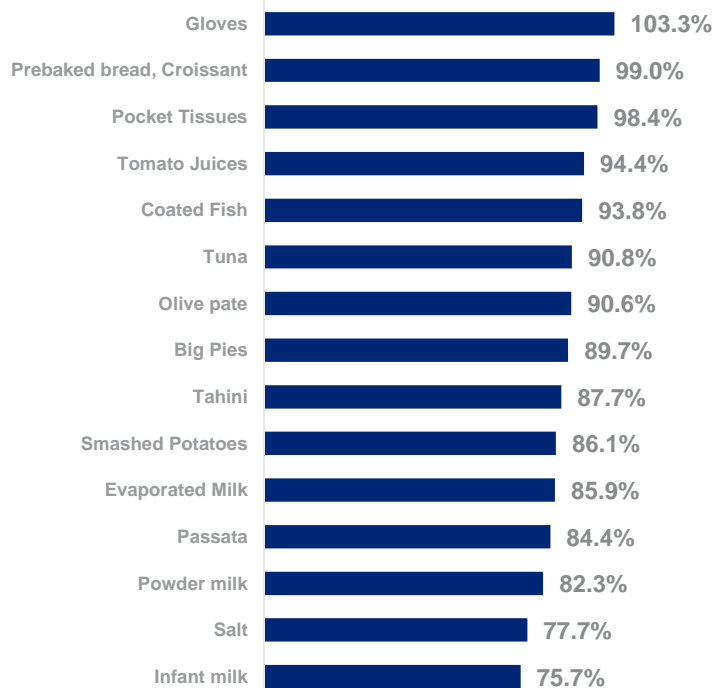
Best Selling 16th - 30th



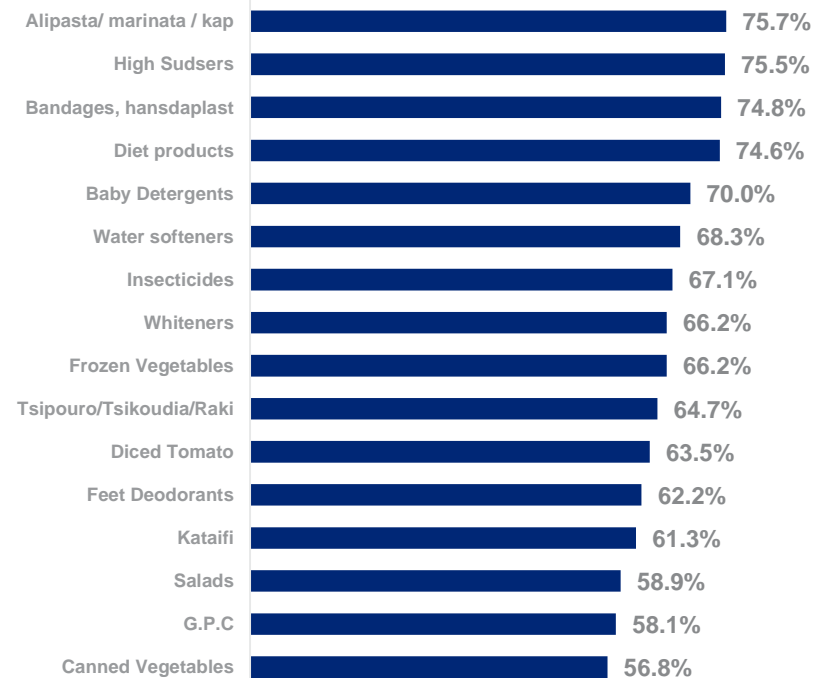
COVID-19 impact on FMCG value sales for major categories

01.03.20 vs 03.03.19

Best Selling 31st - 45th



Best Selling 46th - 60th



Total FMCG sales Declined by -17,0%, while 73 out of 340 categories managed incremental sales

08.03.20 vs 10.03.19

340
FMCG
CATEGORIES

Food	Household	Personal Care / Hygiene	All Others
168	41	45	86
-22,1%	+1,3%	+1,8%	-16,3%

Week Ending
10.03.19



Week Ending
08.03.20

124,59€ Ms

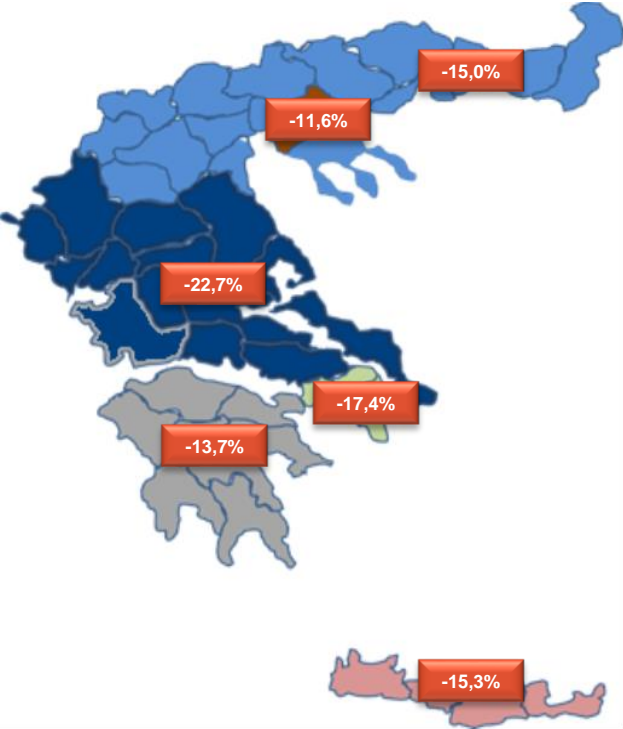


103,47€ Ms

Total FMCG industry: -17,0%

Areas value growths and contributions : Highest decline for Central Greece

08.03.20 vs 10.03.19



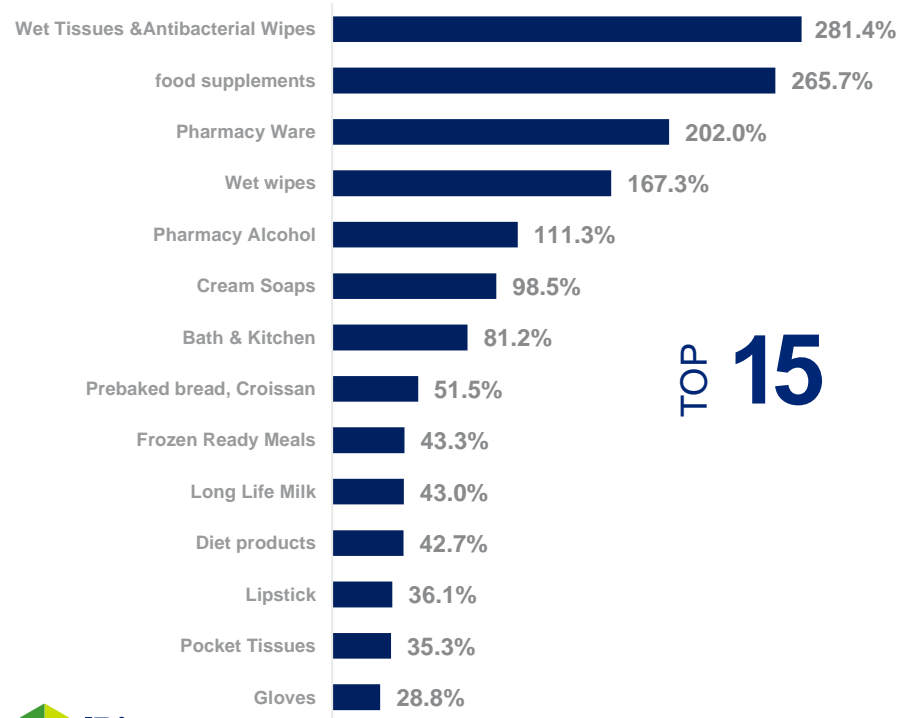
Areas Contribution 08.03.20

Total Greece	103,47€ Ms
Attica	54,3%
Salonica	10,4%
Center	12,5%
North	8,6%
Pel/Sos	8,0%
Crete	6,1%

COVID-19 impact on FMCG value sales for major categories

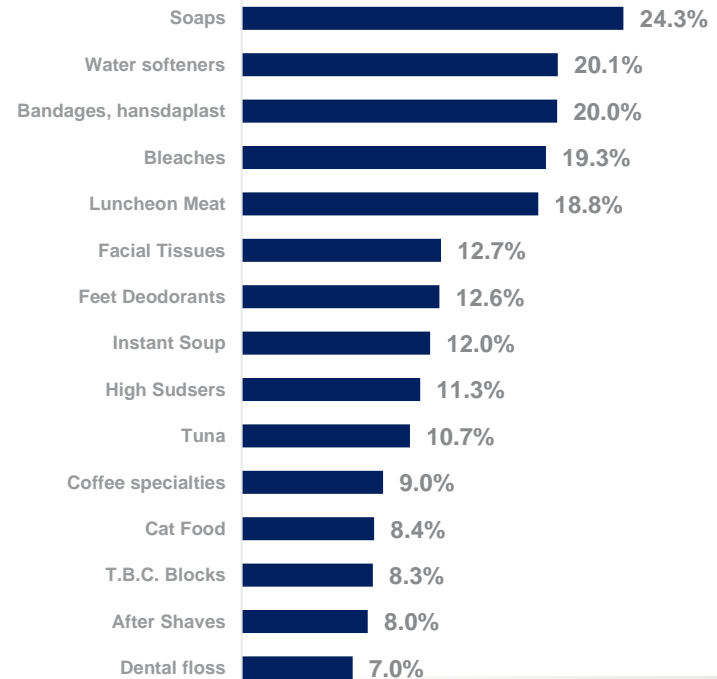
08.03.20 vs 10.03.19

Best Selling 1st - 15th



TOP 15

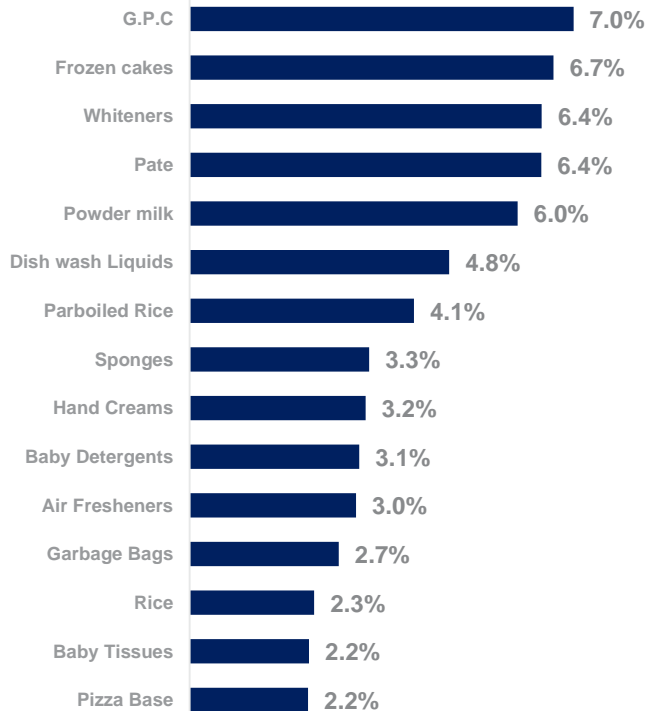
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COVID-19 impact on FMCG value sales for major categories

08.03.20 vs 10.03.19

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Best Selling 46th - 60th

