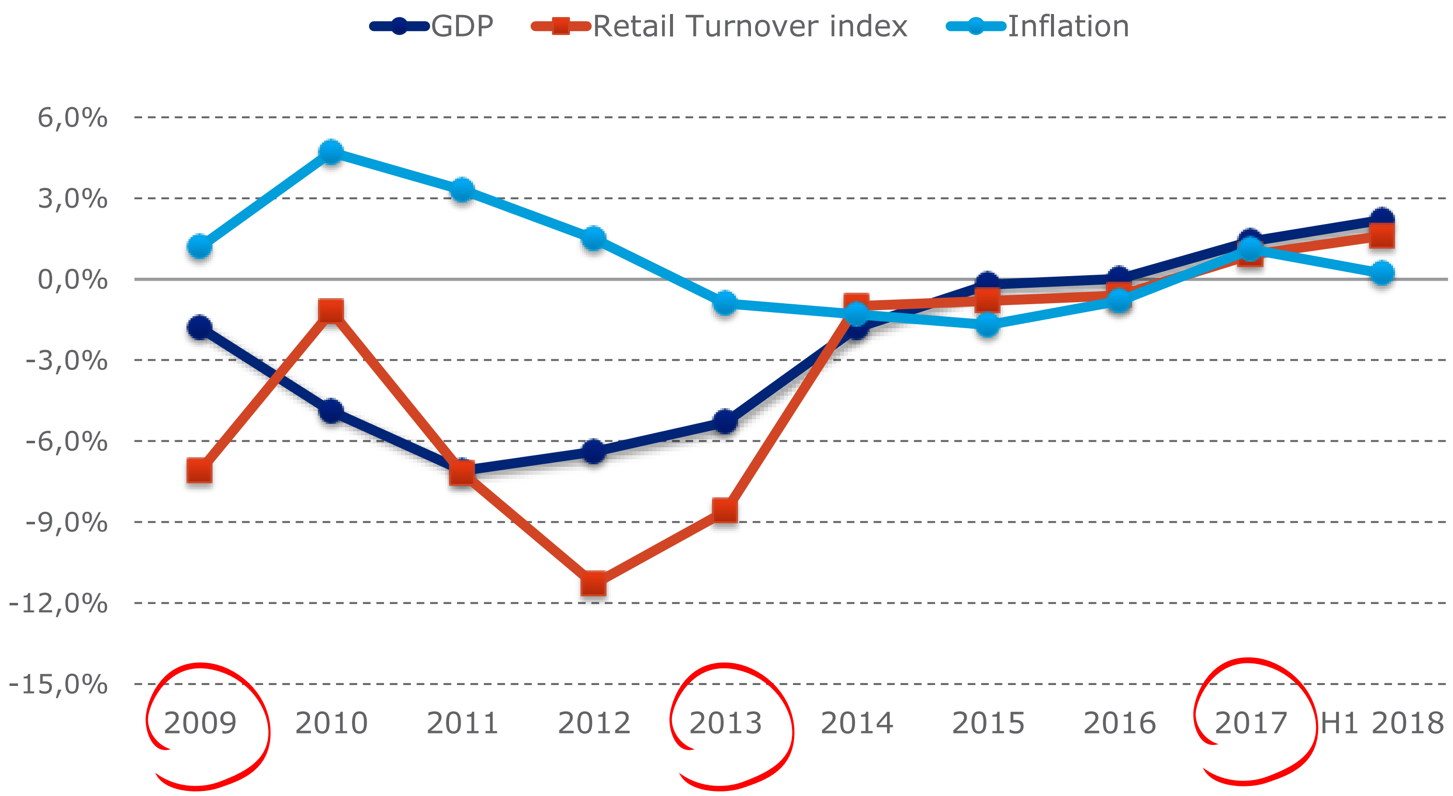
January 2019

Convenience Retailing Conference

Dimitra Katsipi
Sales Director

IRi
Growth delivered.

Key Macroeconomics Indicators report a positive trend



Inflation Rate 2018 vs 2017 **0,6%**

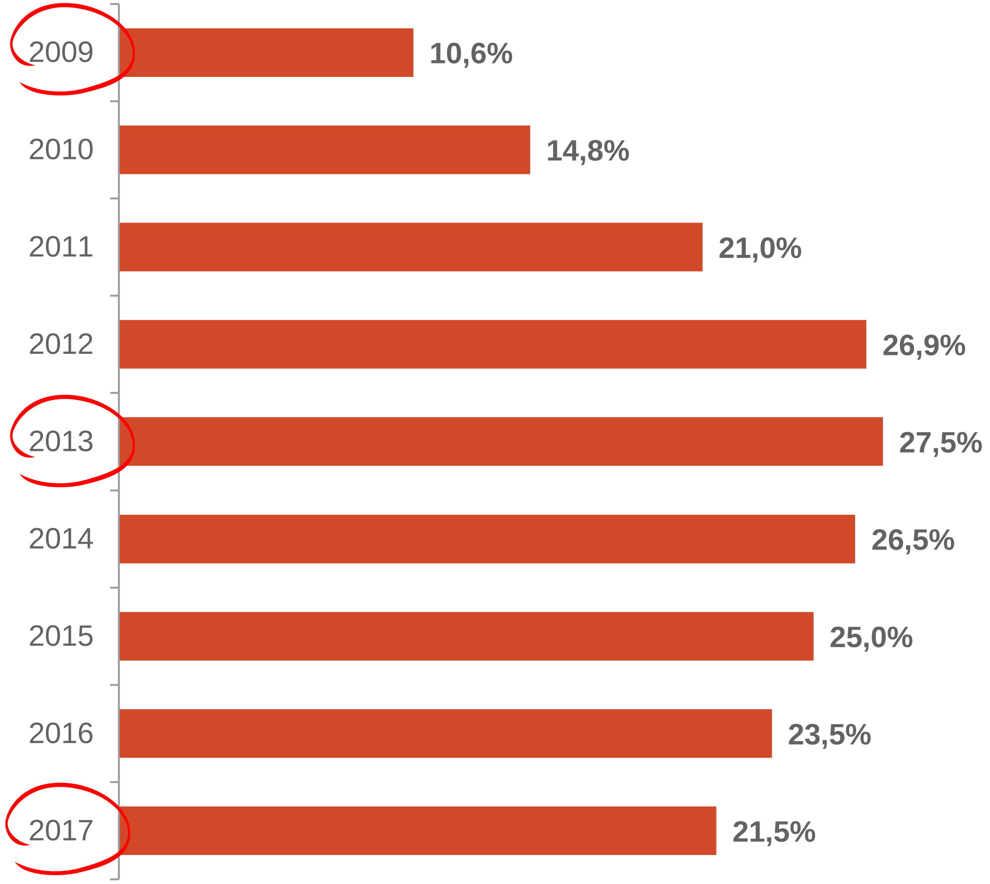
GDP YTD SEP 2018 vs YTD YA **2.1%**

Retail Turnover Index YTD OCT 2018 vs YTD YA (excluding automotive fuel) **1.8%**

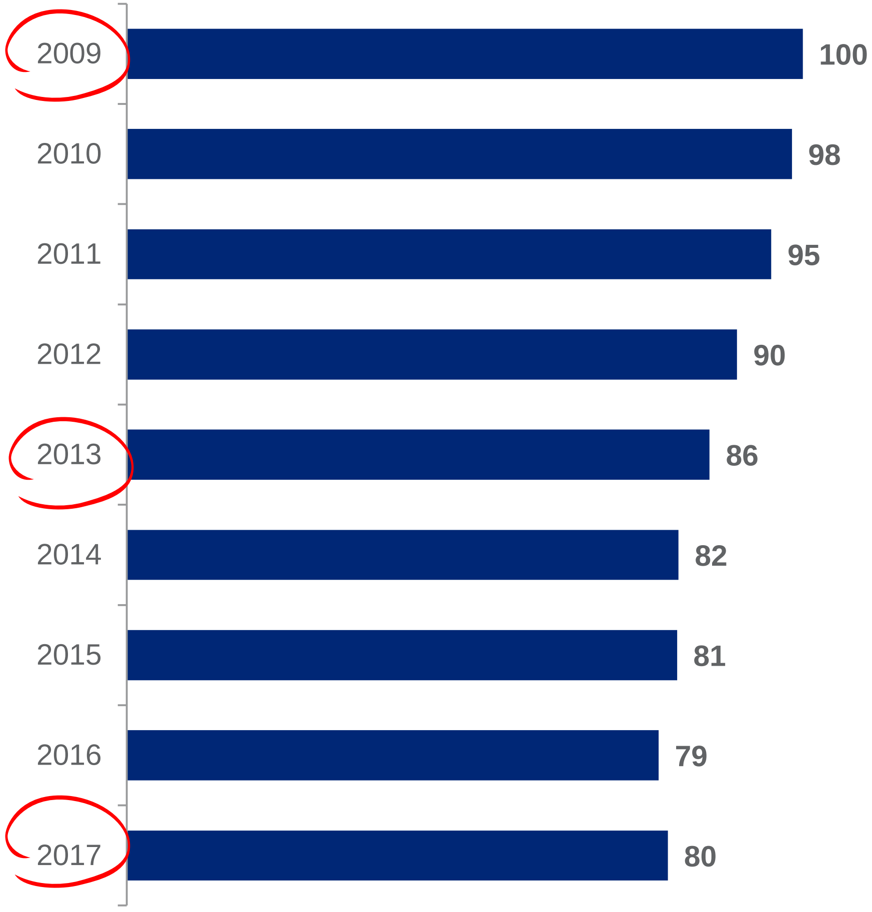
Source: ELSTAT

Key Macroeconomics Indicators report a positive trend

Unemployment Rate



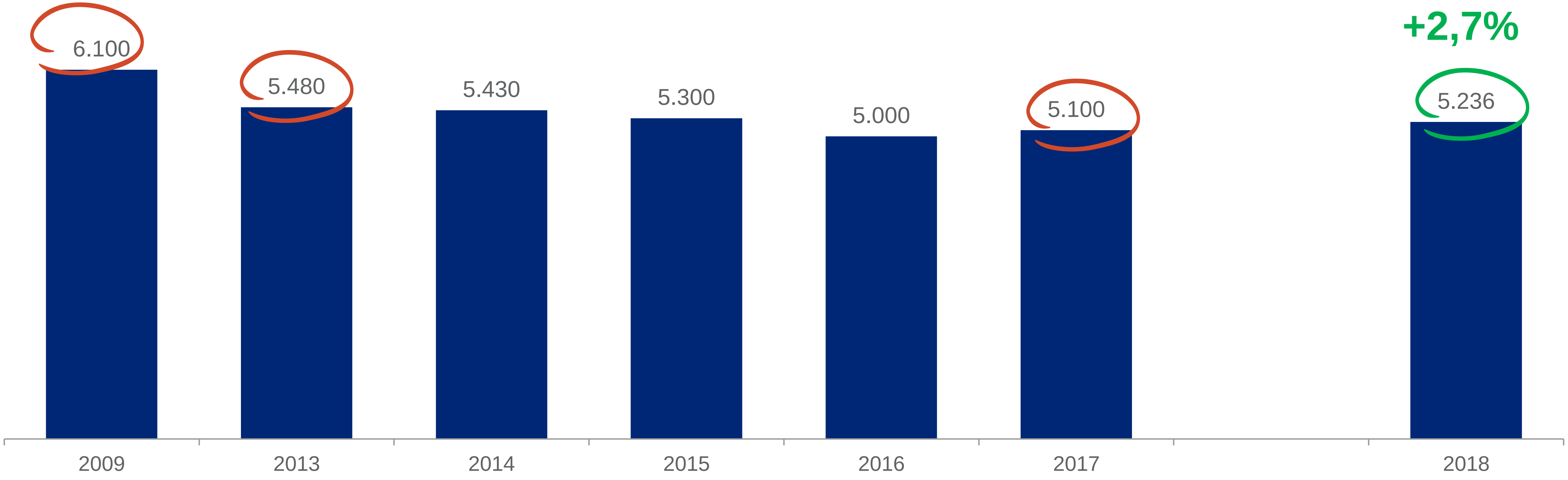
Average spend per capita Index
(Reference Year = 2009)



Source: ELSTAT

FMCG evolution

- FMCG (Food, HBA, Household) | Super/Hyper markets | Value Sales in mio €



Source: IRI InfoScan® FMCG DB. YTD Dec,2018. Bazaar and Random Weight excluded.

Hyper markets increase intensively their sales

TRENDS PER SHOP TYPE - YTD 2018

2500+ sqm

- % Value Contribution: 11,7%
- Value sales trend: **+15,9%**

1000-2500 sqm

- % Value Contribution: 39,4%
- Value sales trend: **+1,6%**

400-1000 sqm

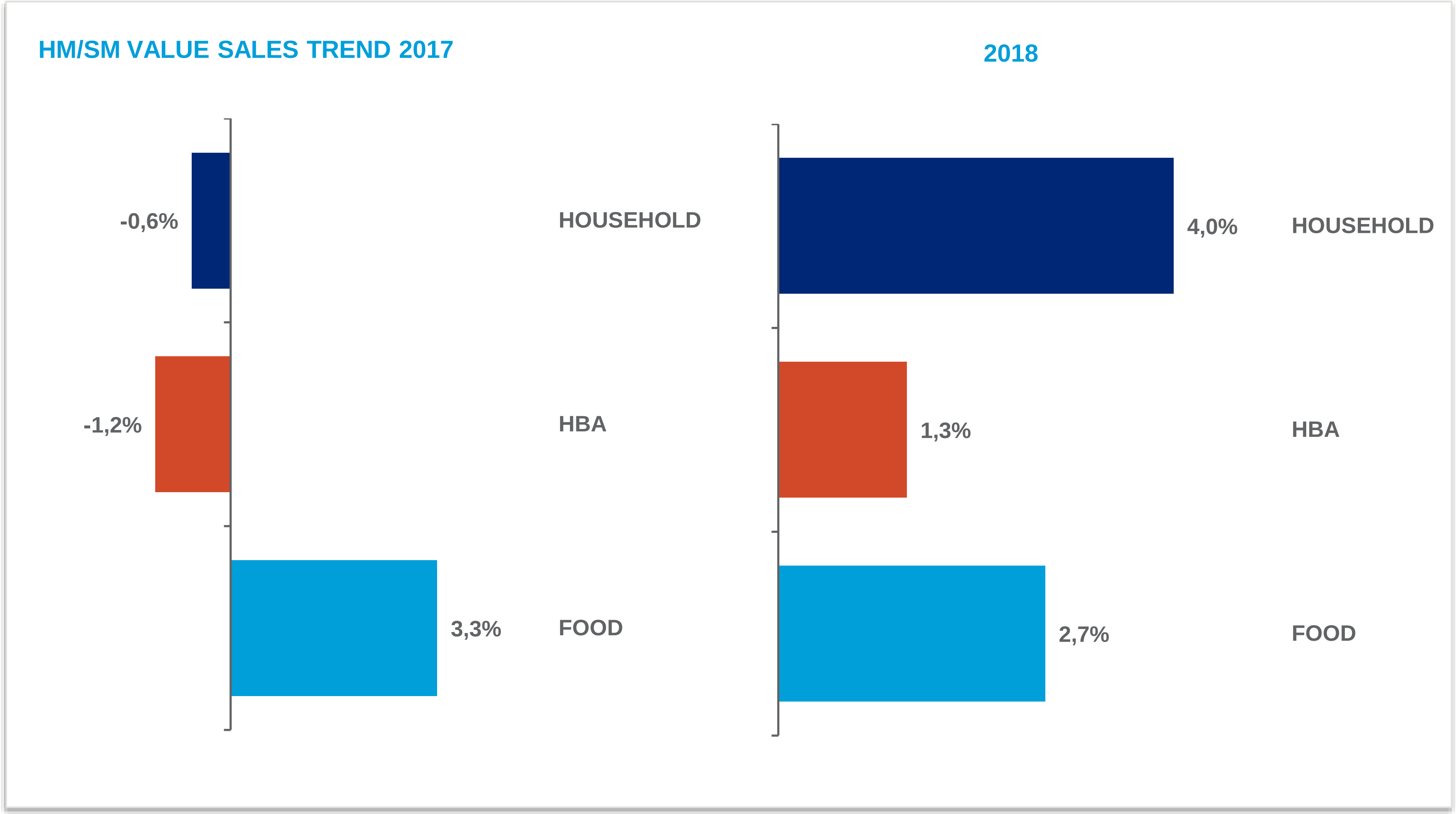
- % Value Contribution: 35,8%
- Value sales trend: **+0,8%**

0-400 sqm

- % Value Contribution: 13,1%
- Value sales trend: **+0,8%**

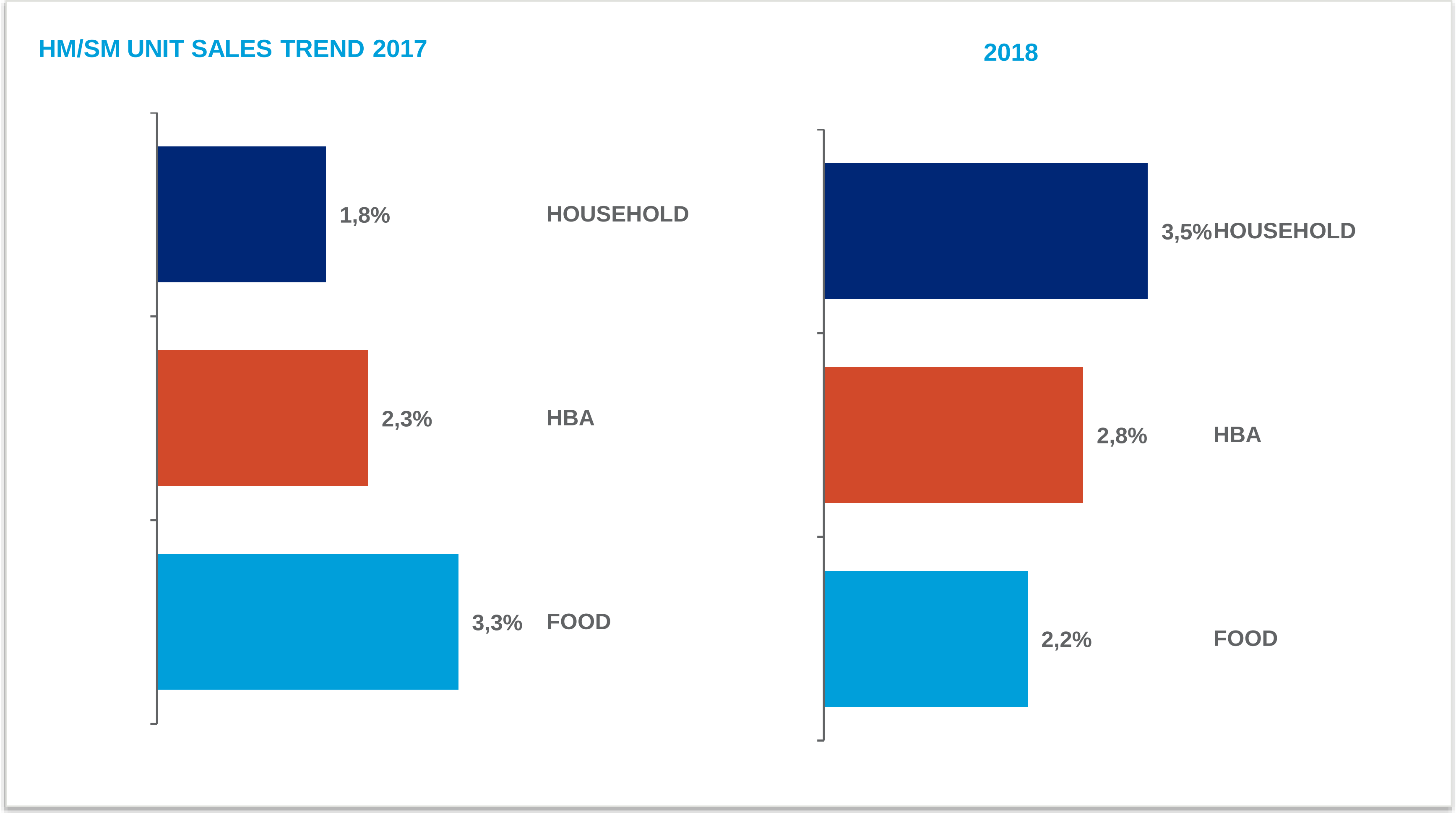
Source: IRI InfoScan, HM/SM, YTD: Jan – December 2018

All Giga-Categories are increasing in 2018



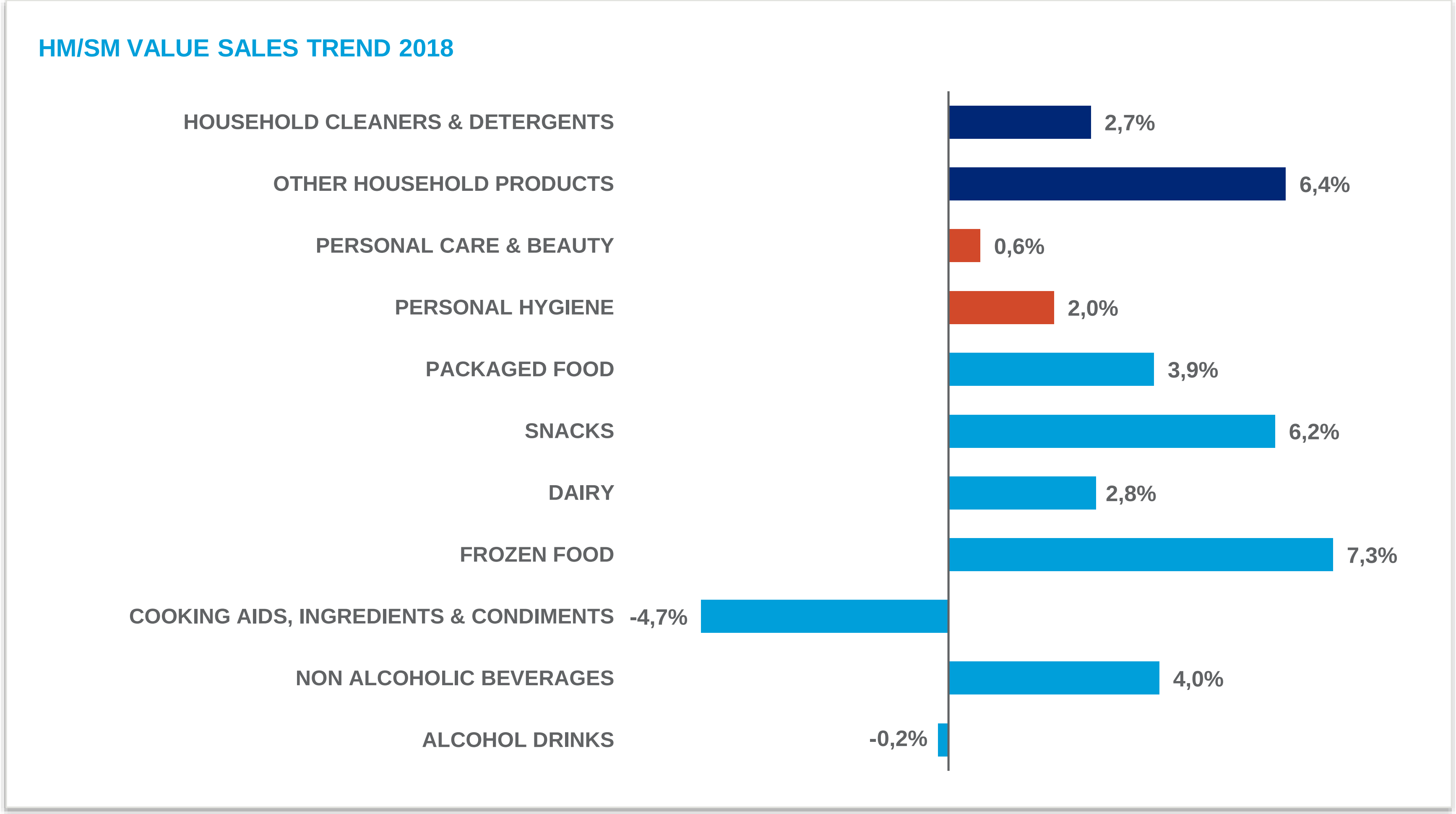
Source: IRI InfoScan, HM/SM, YTD: Jan – December 2018

Unit sales



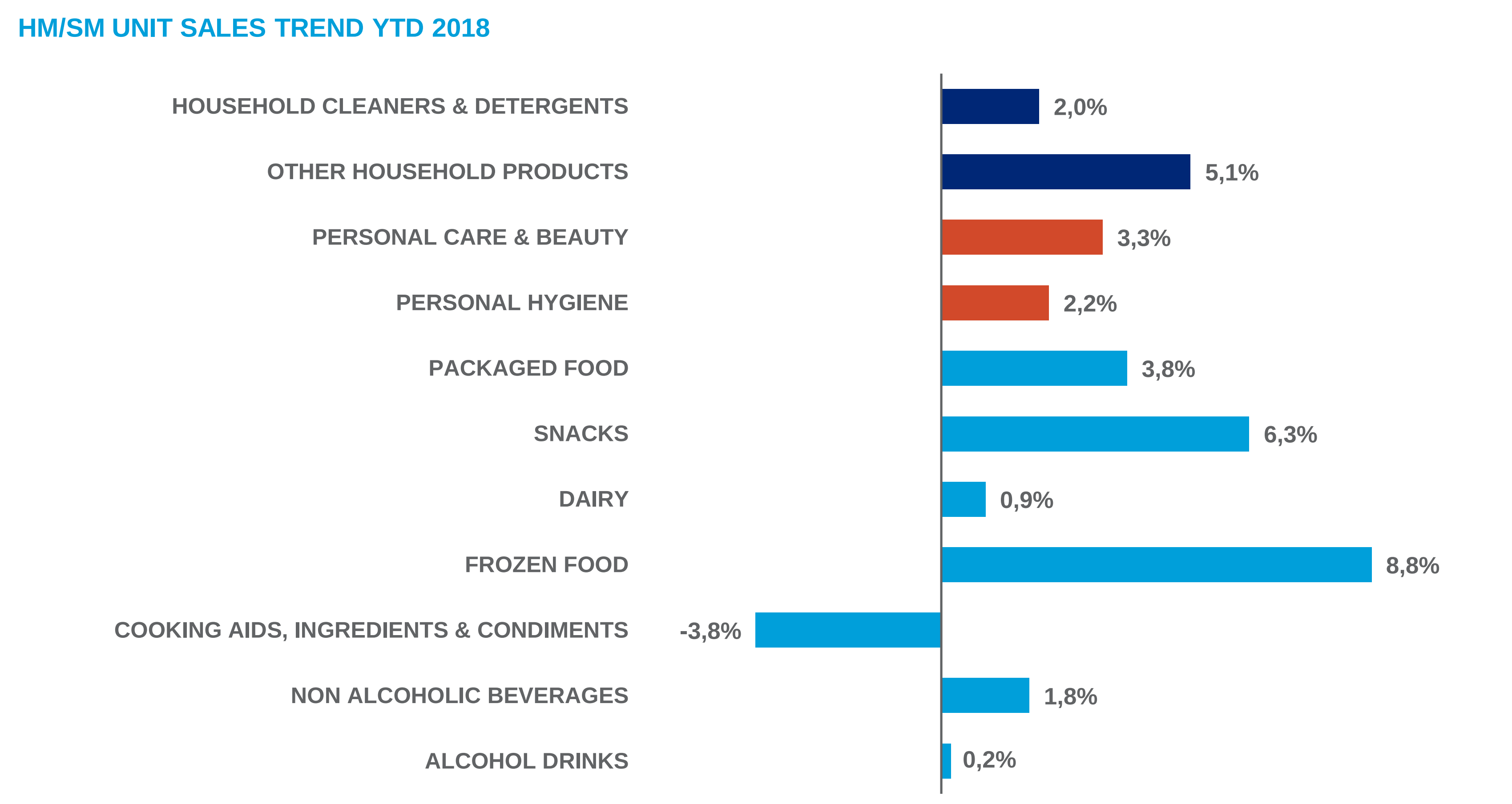
Source: IRI InfoScan, HM/SM, YTD: Jan – December 2018

All Categories are growing in YTD except Cooking Aids, Ingredients & Condiments



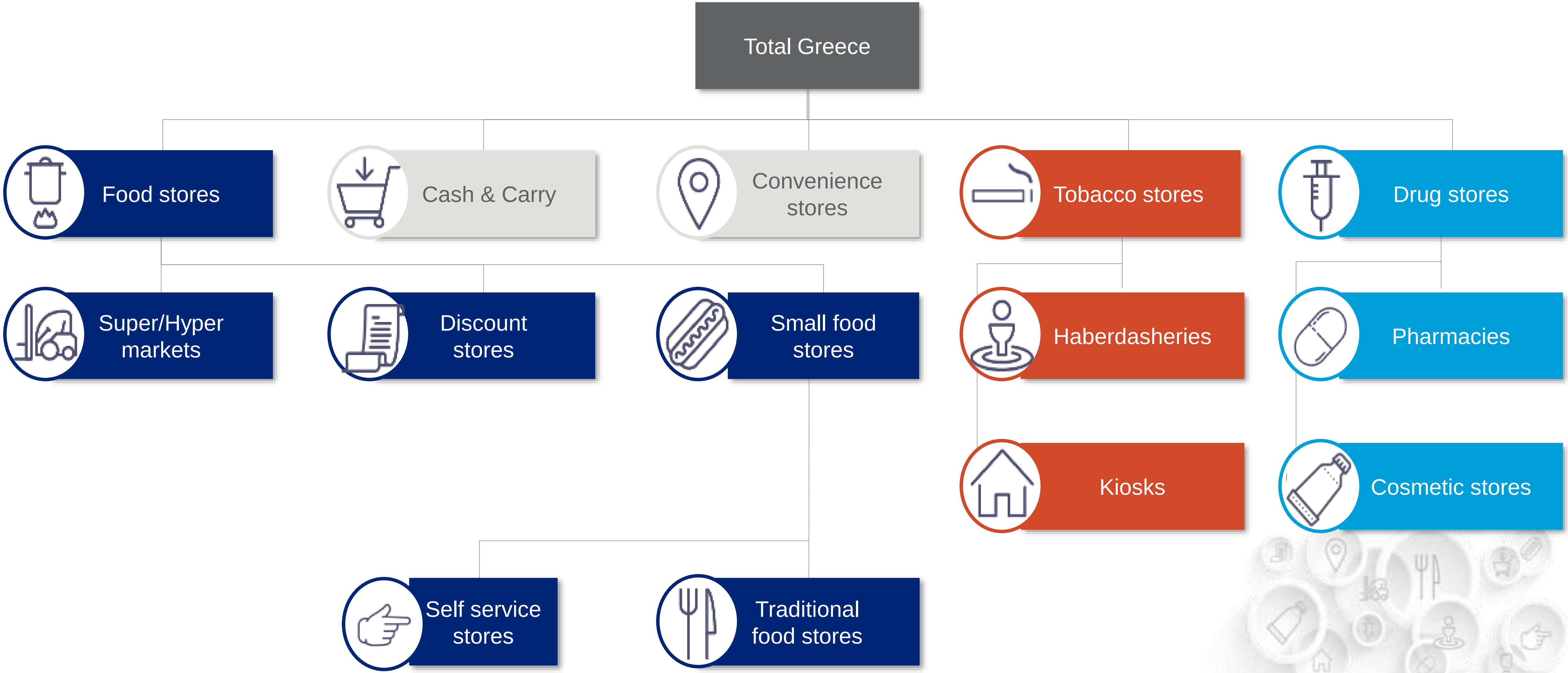
Source: IRI InfoScan, HM/SM, YTD: Jan – December 2018

Same case in Unit Sales



Source: IRI InfoScan, HM/SM, YTD: Jan – December 2018

Retail Trade layout



Retail Trade layout

Total Greece

Food stores

2009	2013	2017	Diff.
16.793	12.747	12.788	–

Cash & Carry

2009	2013	2017	Diff.
-	105	121	↑

Convenience stores

2009	2013	2017	Diff.
12.828	8.391	7.998	↓

Tobacco stores

2009	2013	2017	Diff.
17.418	11.438	9.982	↓

Super/Hyper markets

2009	2013	2017	Diff.
2.502	2.440	2.422	–

Discount stores

2009	2013	2017	Diff.
574	207	221	–

Small food stores

2009	2013	2017	Diff.
13.717	10.100	10.145	–

Haberdasheries

2009	2013	2017	Diff.
8.699	5.931	5.089	↓

Super / Hyper 0-400m^2

2009	2013	2017	Diff.
1.058	1.058	934	↓

Kiosks

2009	2013	2017	Diff.
8.719	5.507	4.893	↓

Self service stores

2009	2013	2017	Diff.
-	5.426	5.732	↑

Traditional food stores

2009	2013	2017	Diff.
-	4.674	4.413	↓

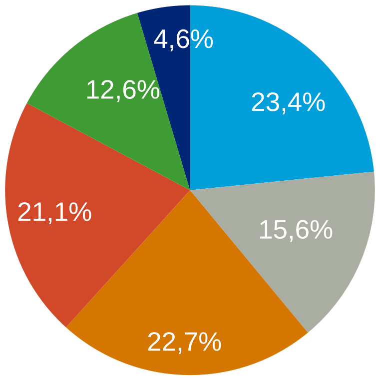
Diff. 2017 vs. 2013

Convenience stores: Number of stores & contribution by geographical area

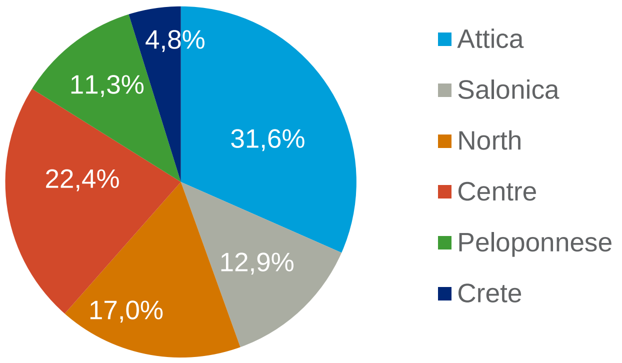
Neighbourhood stores, open at least 10 hours a day. Their core business is coming from dairy/bakery products, alcoholic and non alcoholic drinks and confectionery products (chocolates, chewing gums, etc.)

	YEAR 2017	YEAR 2016
Attica	1,875	1,973
Salonica	1,249	1,313
North	1,815	1,885
Centre	1,683	1,731
Peloponnese	1,010	1,138
Crete	366	387
Total Convenience Stores	7,998	8,427

NUMERICAL

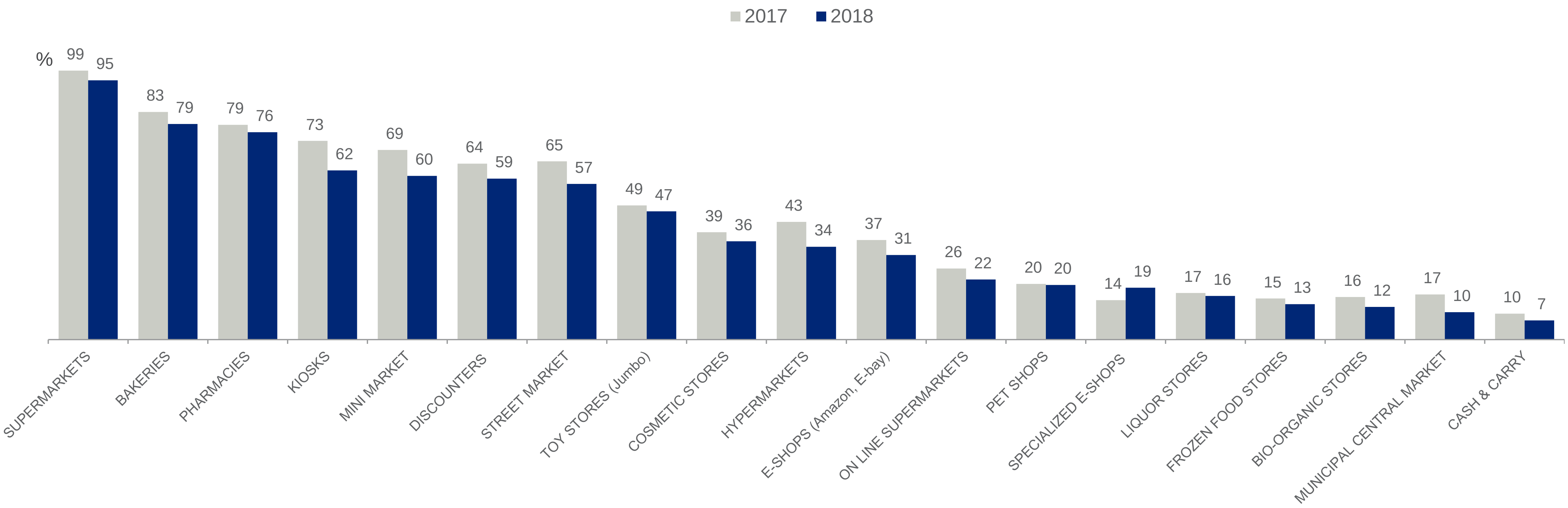


WEIGHTED



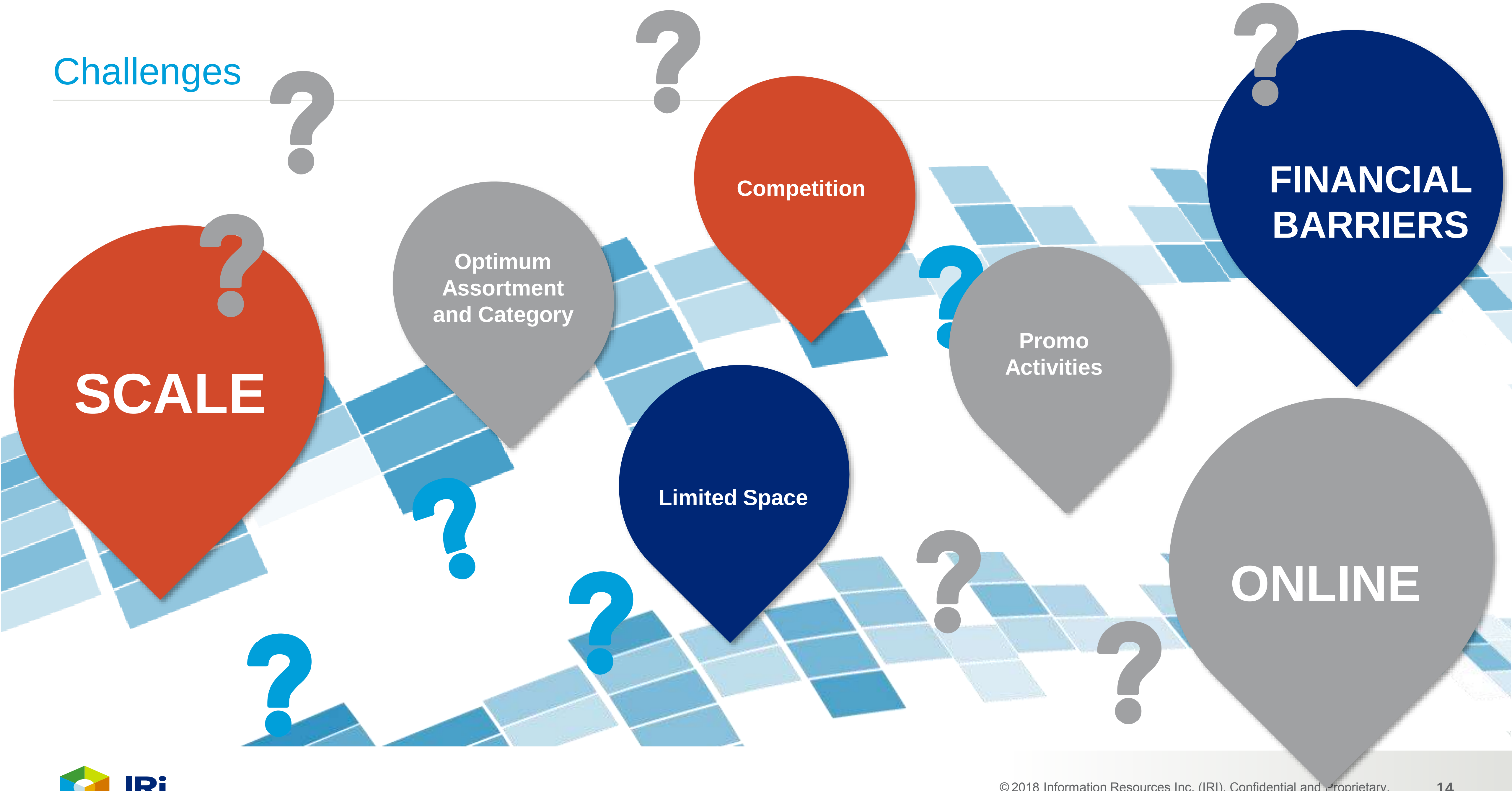
Shoppers have visited approx. 6 different store types last week and 7 last month

Store types visited last month

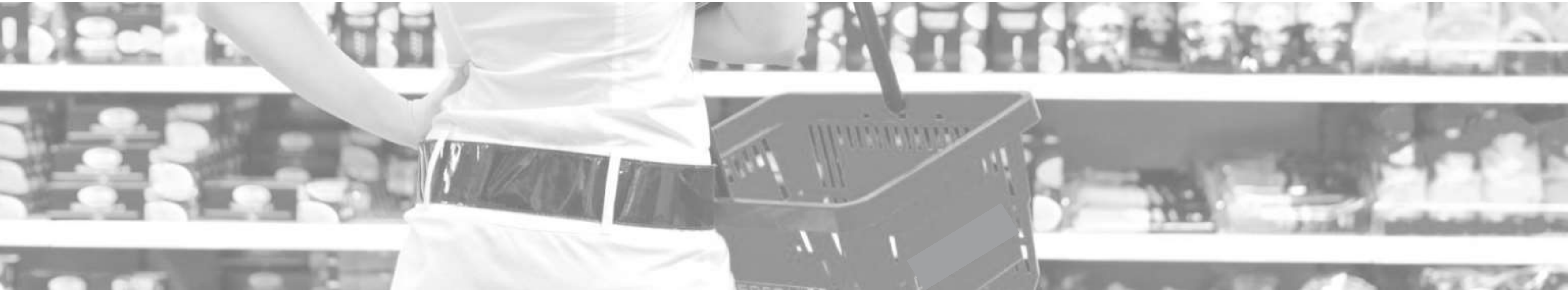


Source: IRI Shopper Research 2017-2018, Apr 2018

Challenges


SCALE
Optimum Assortment and Category
Competition
Limited Space
Promo Activities
FINANCIAL BARRIERS
ONLINE

The Retail Environment is …



Employees

Price

Assortment

Promotions

Shoppers

Location

Competition

Store Execution

Macroeconomics

Inflation

Unemployment

Store Layout

Turnover

Out of Stock

THANK YOU!

For More Information, Contact Us…

IRI Greece
31 Spartis Street, 114 52, Metamorfosi, Athens, Greece
Dimitra.Katsipi@IRIworldwide.com
+30 210 27 87 698

Follow us on Twitter: **@IRIworldwide**