

Traditional Trade: Searching for a Spark

Moving Annual Period: week ending 23/08/2026

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NIQ



Channel definitions

NIQ standards – Retail Store Classification

Retail Store Classification

NIQ Standards

Convenience Trade

The **Convenience Trade** segment encompasses retail businesses strategically positioned to offer consumers immediate access to a broad assortment of everyday consumables. These outlets are typically small-format stores designed to facilitate quick purchases, catering to time-sensitive shopping occasions.

Product Assortment Includes: Grocery, Dairy and bakery items, Confectionery and snacks, Beverages, Health and Beauty products, Selectively fresh or frozen food items, Tobacco products and newspapers

Included Store Types: Traditional Food Stores, Dairies, Bakeries, Haberdasheries

Excluded Store Types: Specialty outlets such as: Fruit & Vegetable Vendors, Fish & Meat Stores, Liquor Stores

Other Covered Retail Formats

Kiosks: Ultra-small retail units (1–2m² selling surface) with open access from all sides and no enclosed entrance. These serve as high-frequency, impulse-purchase locations.

Retail Store Classification

NIQ Standards

Organized Trade

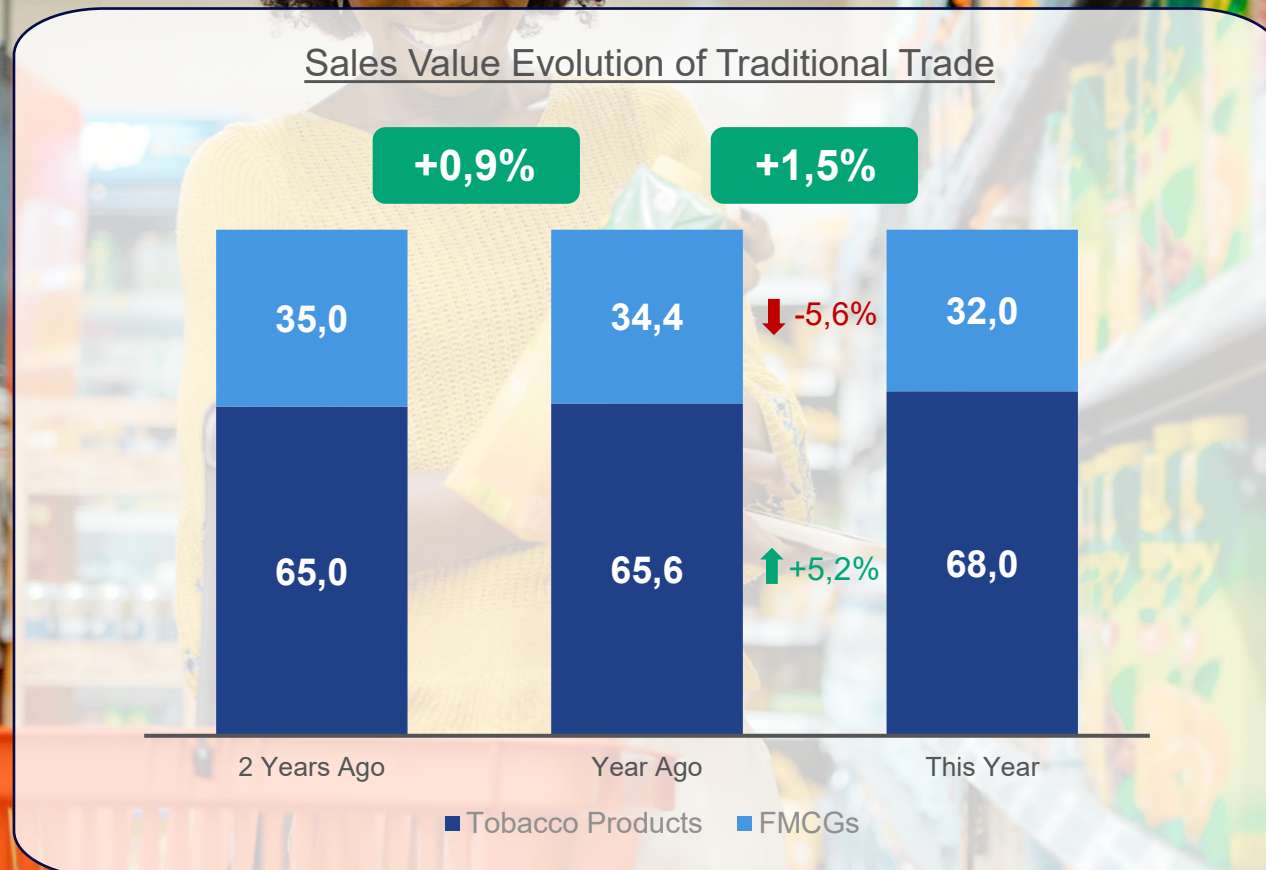
NielsenIQ defines retail outlets based on selling surface and product mix criteria to ensure consistent segmentation across its measurement services. The classification applies to stores with a **selling area exceeding 100m²**, where **FMCGs** -including food & beverage, household products, personal hygiene, and health & beauty items- account for **more than 50% of total turnover**.

The segmentation is structured as follows:

- **Hypermarkets:** Retail outlets with a selling surface **greater than 2,500m²**, offering a broad assortment of FMCGs and general merchandise.
- **Large Supermarkets:** Stores with a selling surface between **1,000m² and 2,500m²**, typically serving as regional or high-traffic retail anchors.
- **Small Supermarkets:** Outlets ranging from **400m² to 1,000m²**, commonly located in urban neighborhoods or mid-sized communities.
- **Superettes:** Compact retail stores with a selling surface between **100m² and 400m²**, focused on convenience and proximity shopping.

This classification framework supports consistent panel construction, universe estimation, and strategic analysis across NielsenIQ's retail measurement solutions.

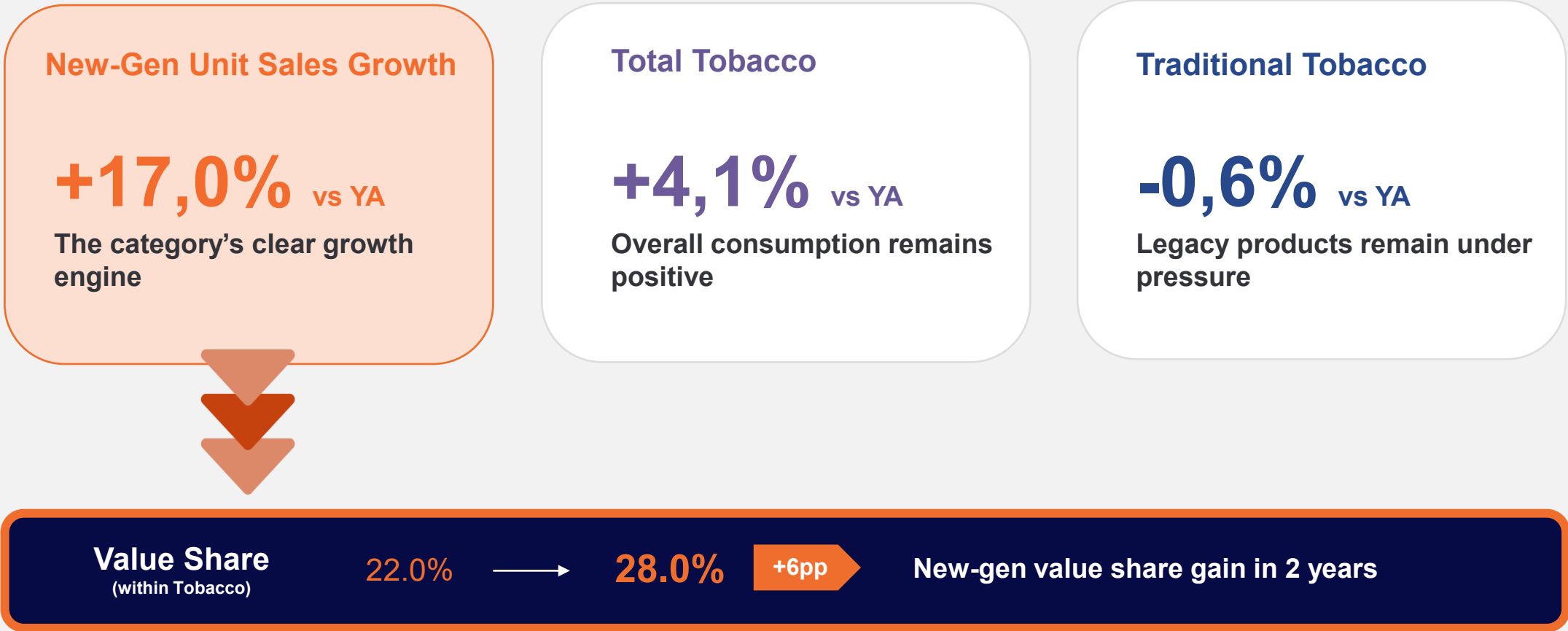
Tobacco Products remain a critical growth driver for Traditional Trade



Market: Traditional Trade – Total Greece Convenience + Kiosks
Source: MarketTrack | Reported Period: MAT w/e 23/08/2026

One category, three signals of transformation

New-Gen tobacco products growth is both lifting the category and changing its composition.



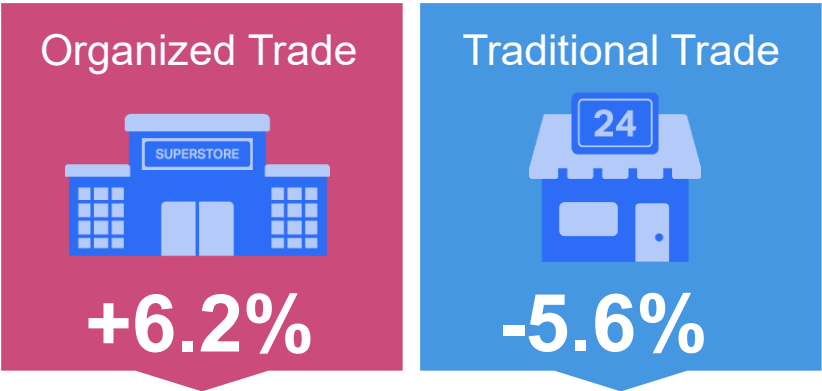
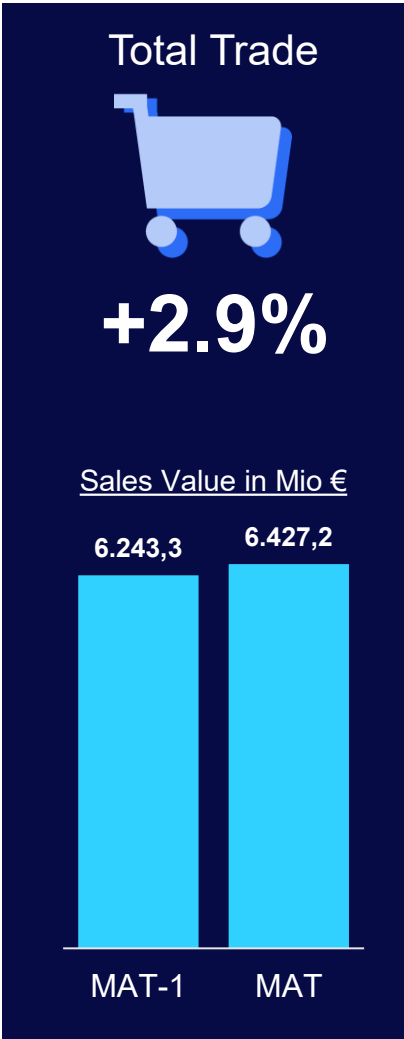
Market: Traditional Trade – Total Greece Convenience + Kiosks
Source: MarketTrack | Reported Period: MAT w/e 23/08/2026

Analysis on Basket of Traditional Trade FMCG categories*

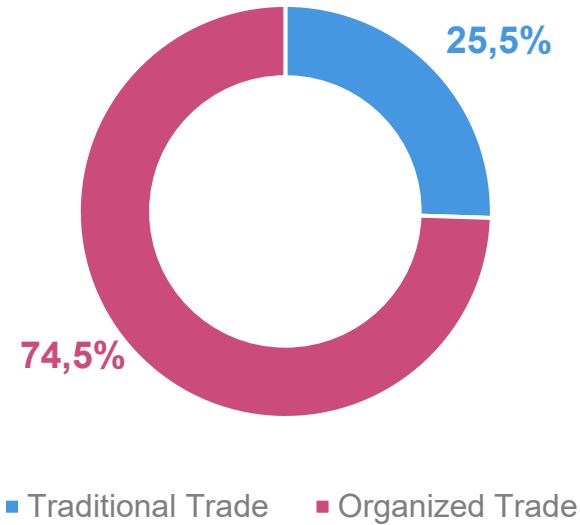
* Excluding Tobacco products

Traditional Trade remains under pressure, but its importance cannot be overlooked

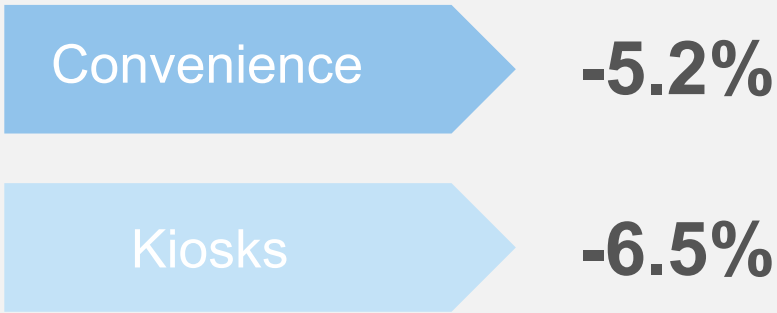
Total Basket of Categories - Sales Value Change % vs MAT YA



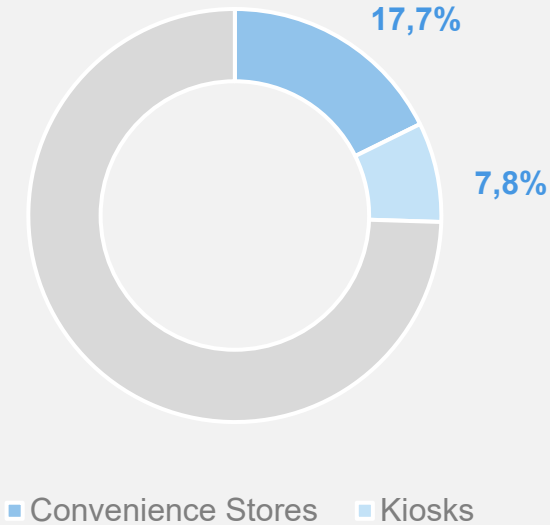
% Contribution of Value Sales



Sales Value Change % vs MAT YA

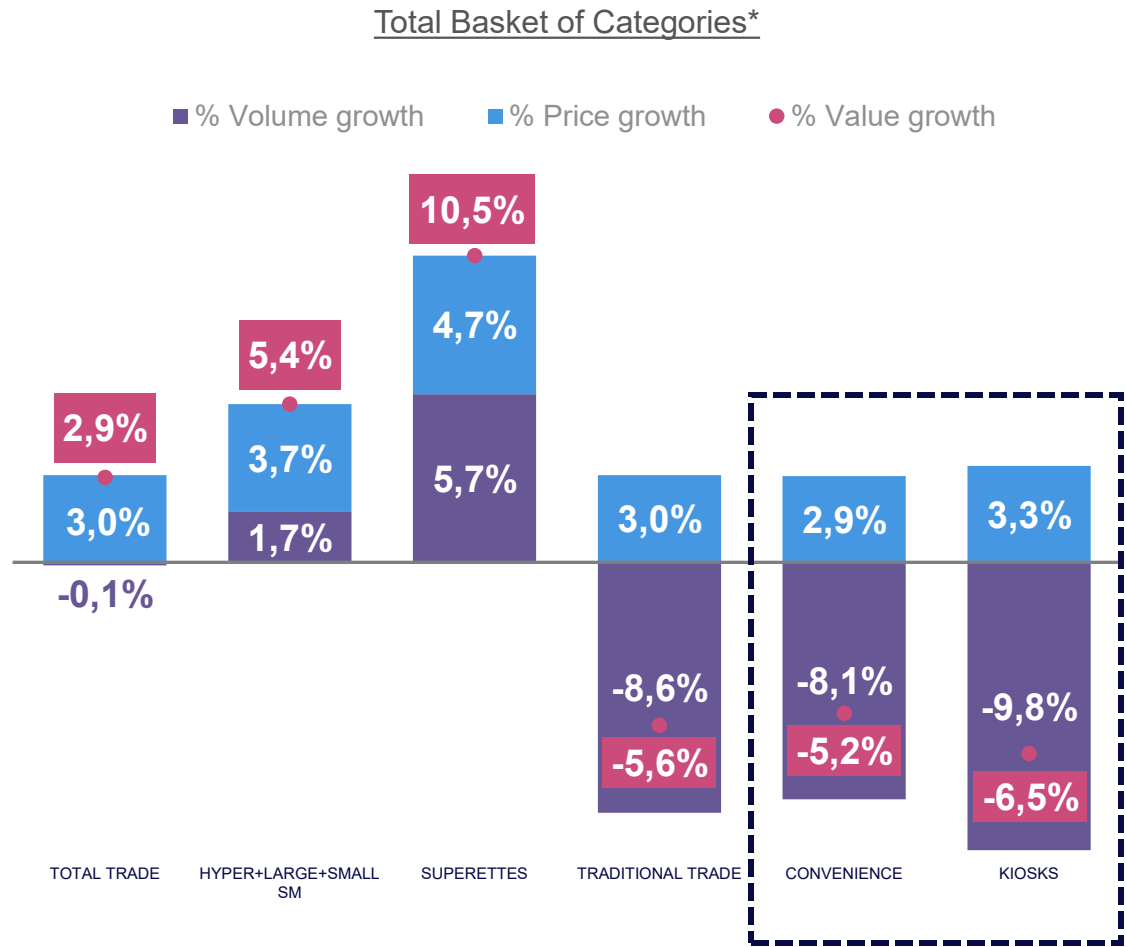


% Contribution of Value Sales



Source: MarketTrack Total Greece Supermarkets + Superettes + Discounters + Convenience + Kiosks | Reported Period: MAT w/e 23/08/2026

Consumer shift to Superettes reshapes Traditional Trade dynamics



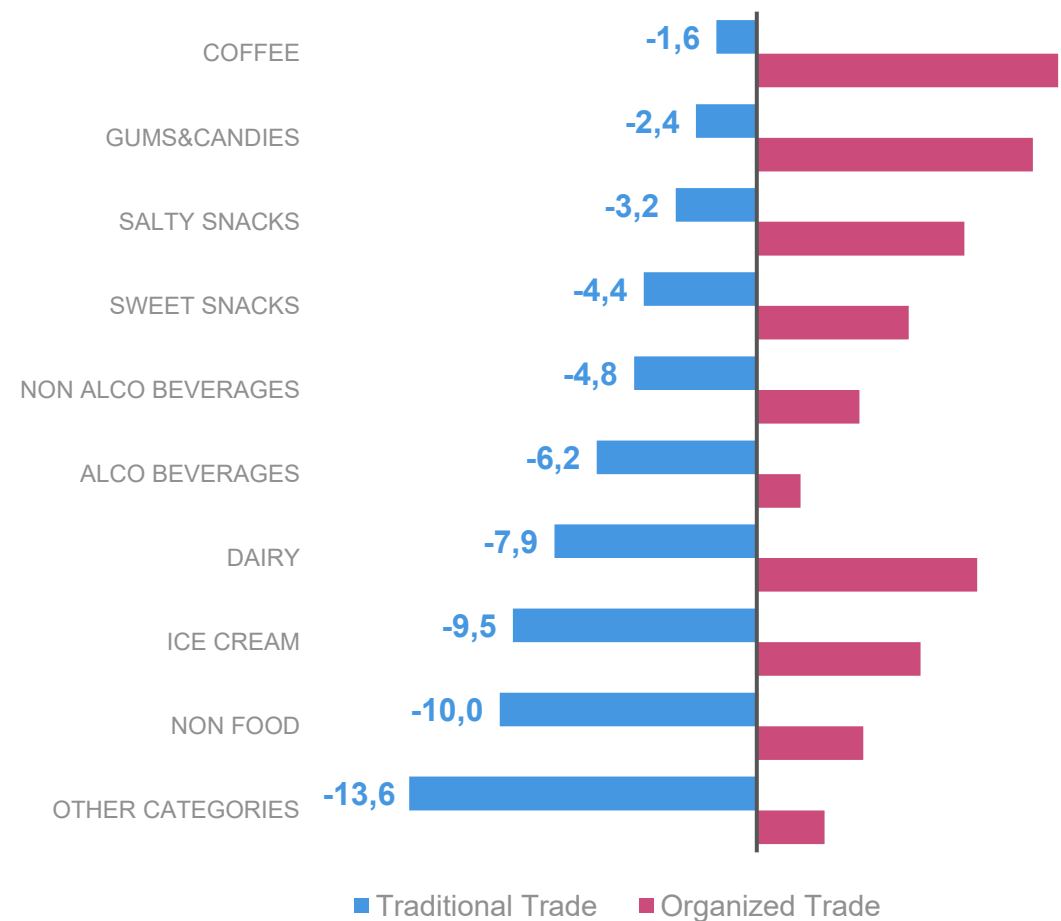
Source: MarketTrack Total Greece Supermarkets + Superettes + Discounters + Convenience + Kiosks |
Reported Period: MAT w/e 23/08/2026



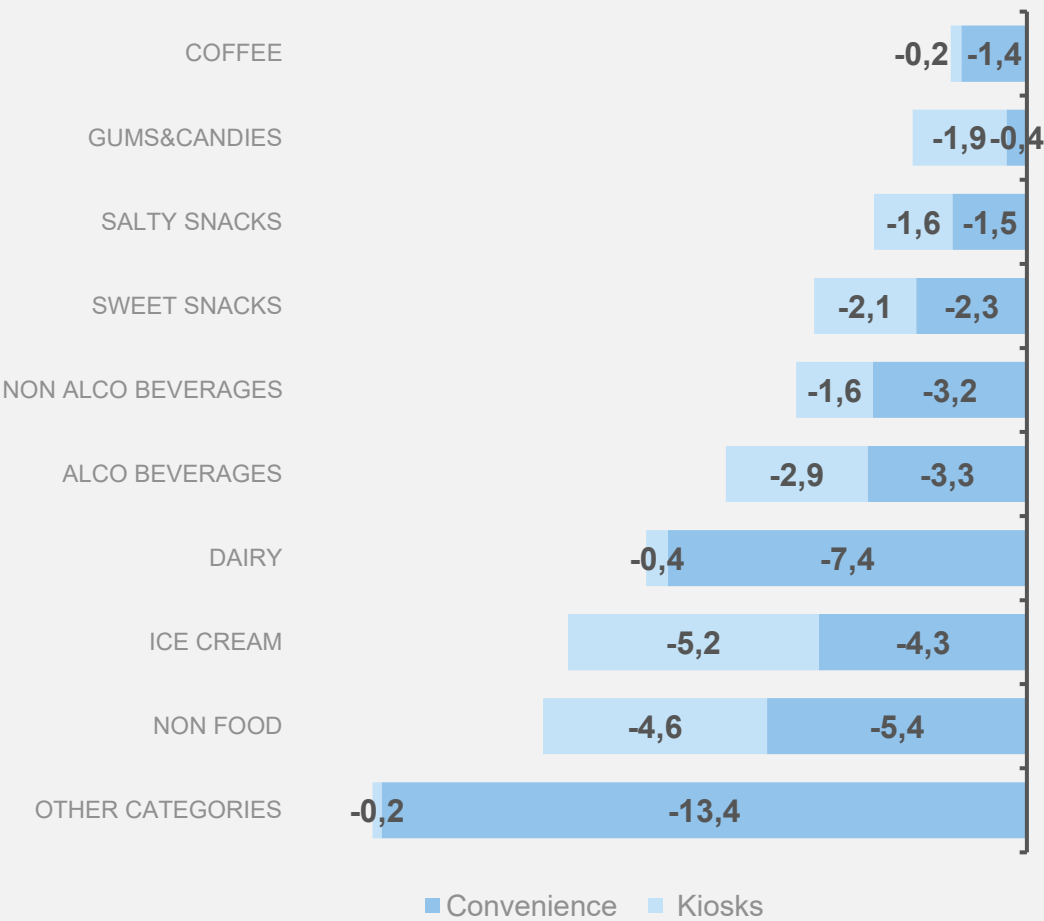
Category Groups performance reveals an ongoing shift toward Organized Trade

Convenience drives the majority of category declines, exerting a greater impact than Kiosks across most super-categories.

Sales in Value % Change vs YA



Traditional Trade % Decomposition per Channel



Source: MarketTrack Total Greece Supermarkets + Superettes + Discounters + Convenience + Kiosks | Reported Period: MAT w/e 23/08/2026

Traditional Trade powers impulse-led consumption.

Yet category performance varies significantly across the portfolio, despite strong channel dependence.



While **Sport Drinks** emerge as the clear winner in Traditional Trade, delivering an additional €2.5 million in value sales versus last year, the next three largest categories are struggling to sustain growth momentum.

 **Soft Drinks** recorded a €18.8 million decline (-7.2%) in value sales vs YA

 **Ice Cream** ranked among the biggest decliners, down €13.4 million (-9.5%) Compared to last year

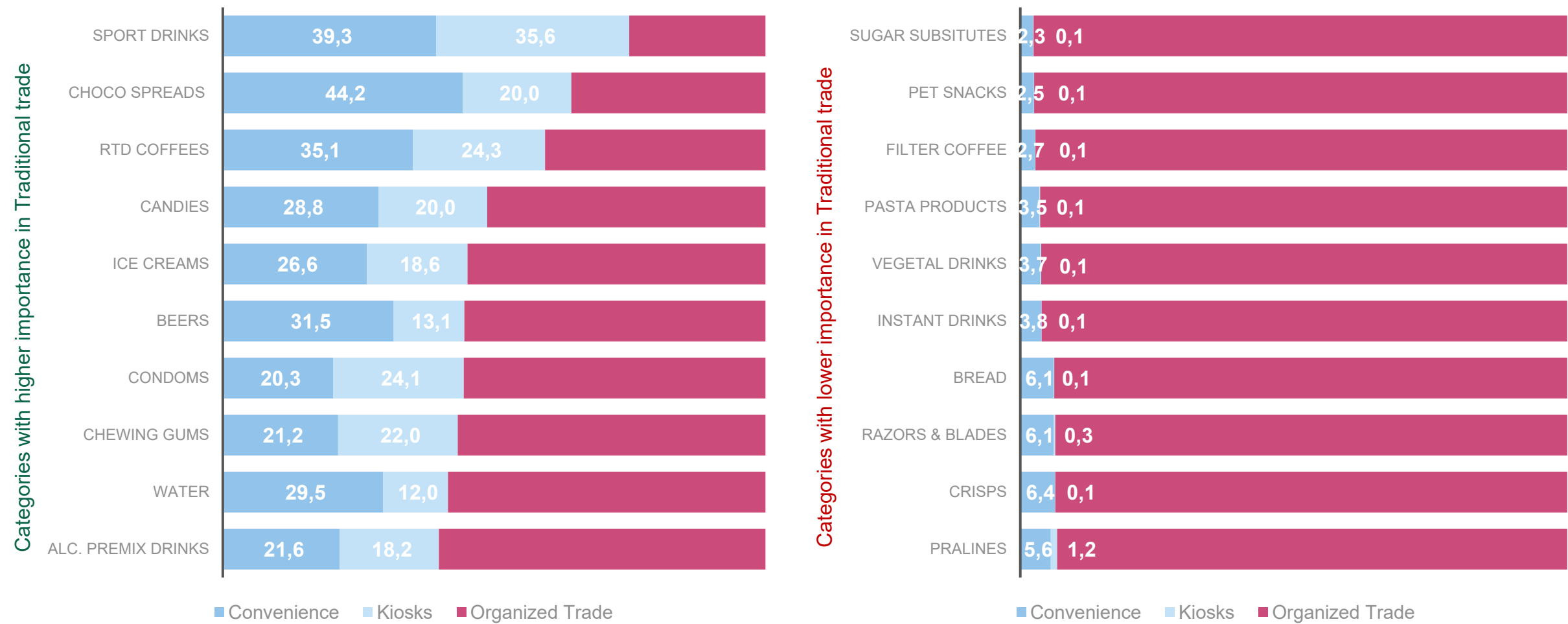
 **Beers** continue to lose momentum, losing €12.6 million (-6.3%) versus YA

Source: MarketTrack Total Greece Supermarkets + Superettes + Discounters + Convenience + Kiosks | Reported Period: MAT w/e 23/08/2026

Impulse categories keep Traditional Trade relevant

Traditional formats capture shopper missions centered on immediacy and convenience, while Organized Trade remains the preferred destination for categories that benefit from broader assortment and choice.

%Contribution to Total Value Sales per Channel

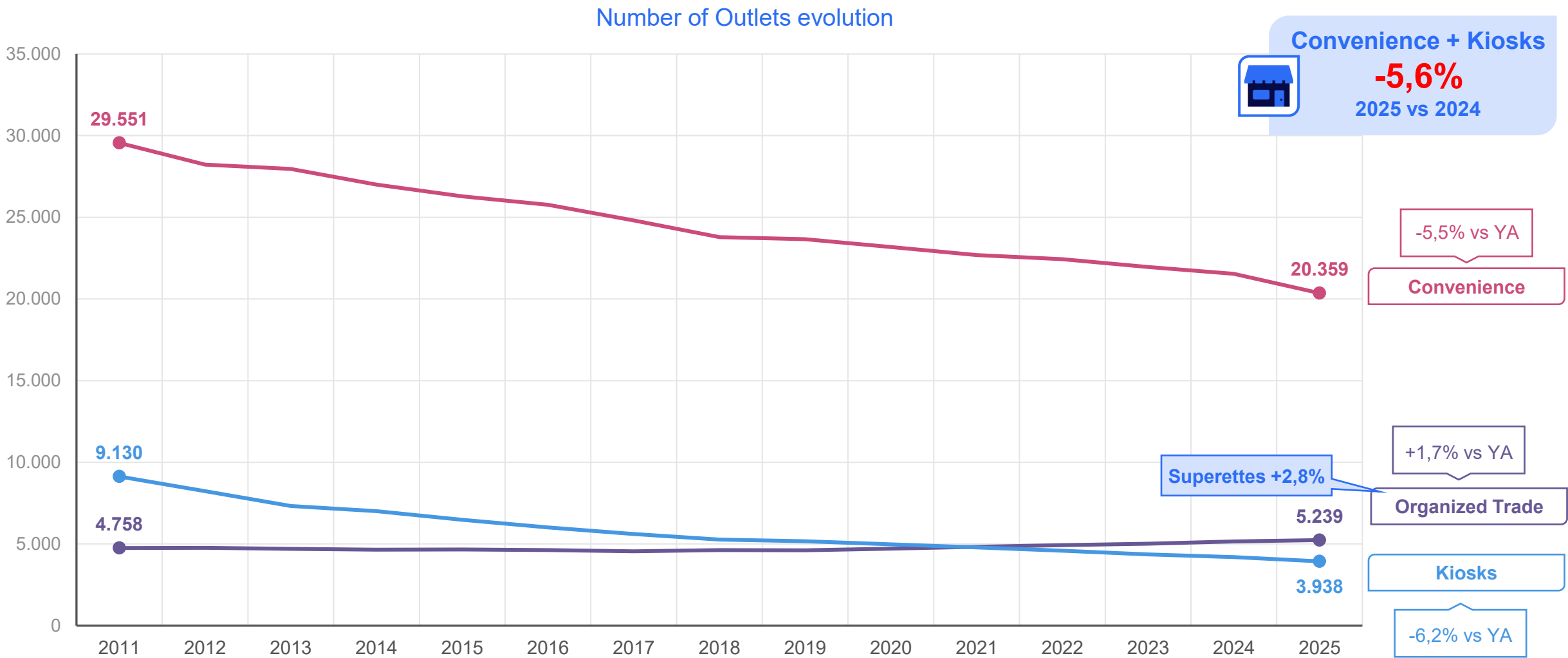


Source: MarketTrack Total Greece Supermarkets + Superettes + Discounters + Convenience + Kiosks | Reported Period: MAT w/e 23/08/2026

Key factors for Lower Trade decline

1. Traditional Trade universe of outlets continues to consolidate

Organized trade continues to expand, with a strong focus on smaller-format stores and neighborhood outlets.

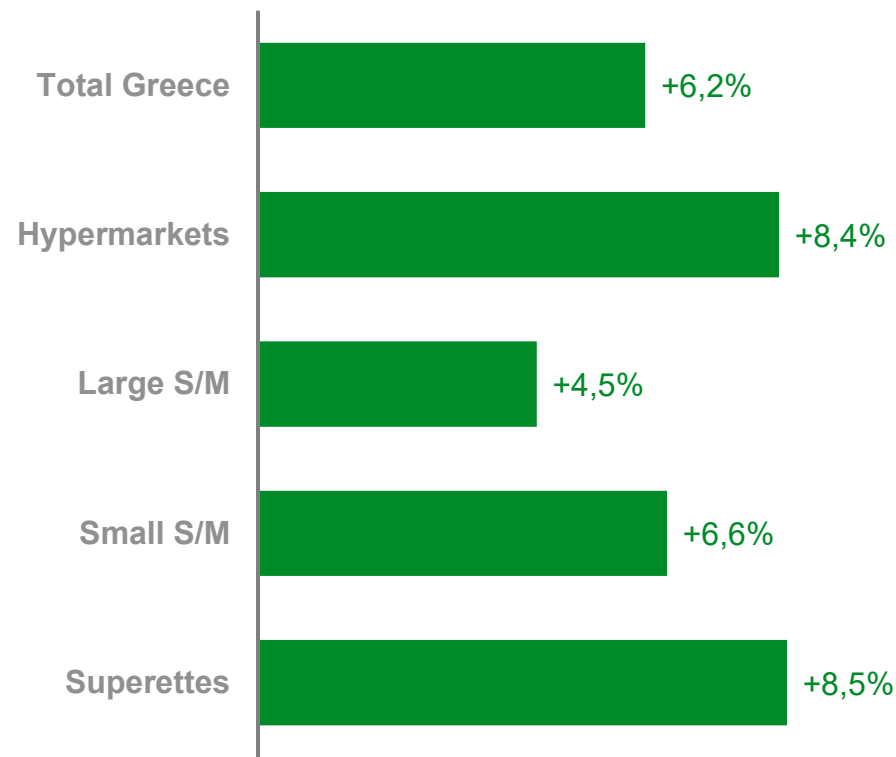


* Universe includes only mainland stores (with Crete).
Source: NielsenIQ Retail Establishment Survey

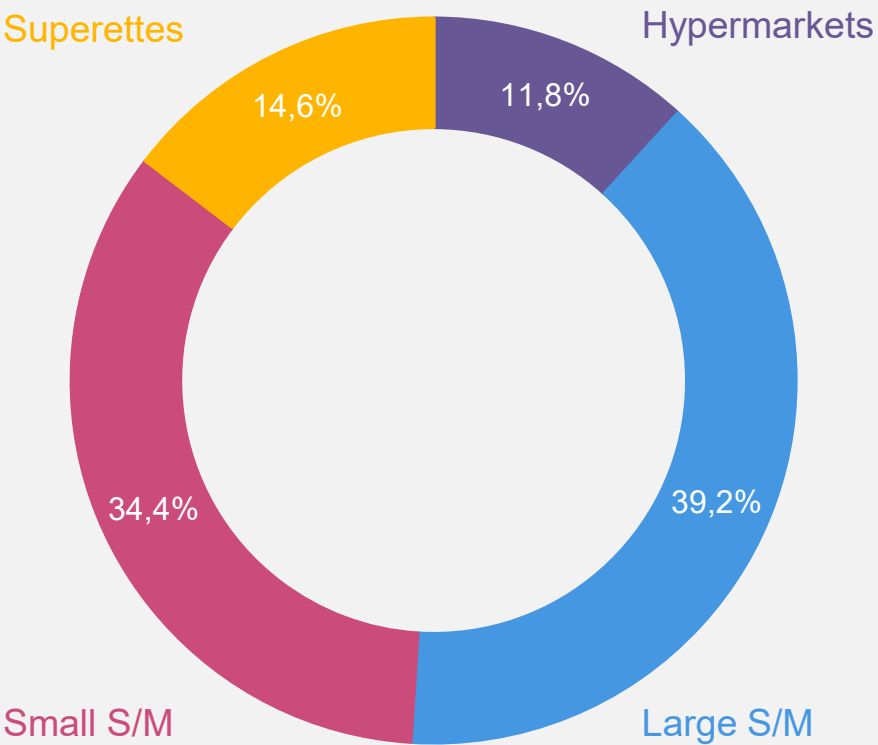
Market evolution per store type

Superettes and Hypermarkets are outperforming the market average.

TSR – Store Types Value % Change vs YA



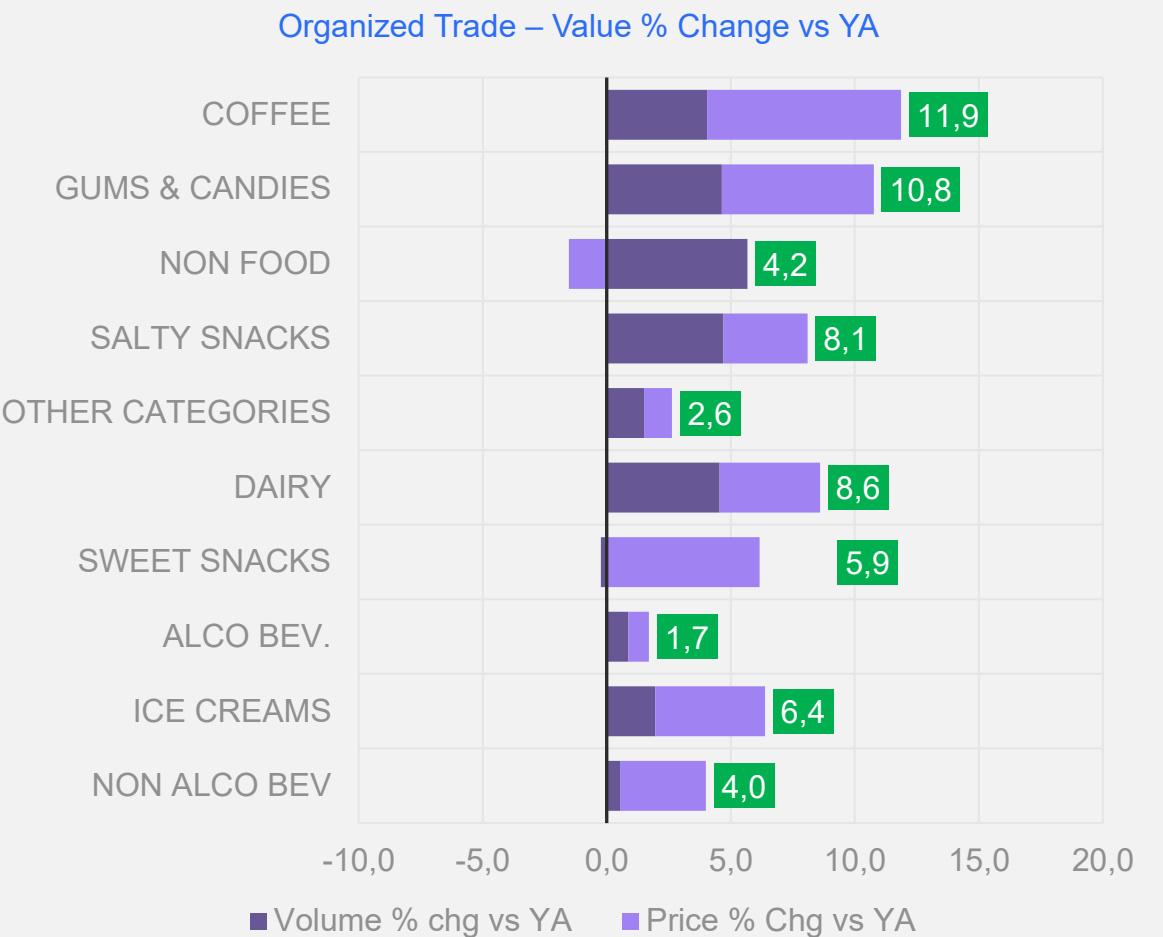
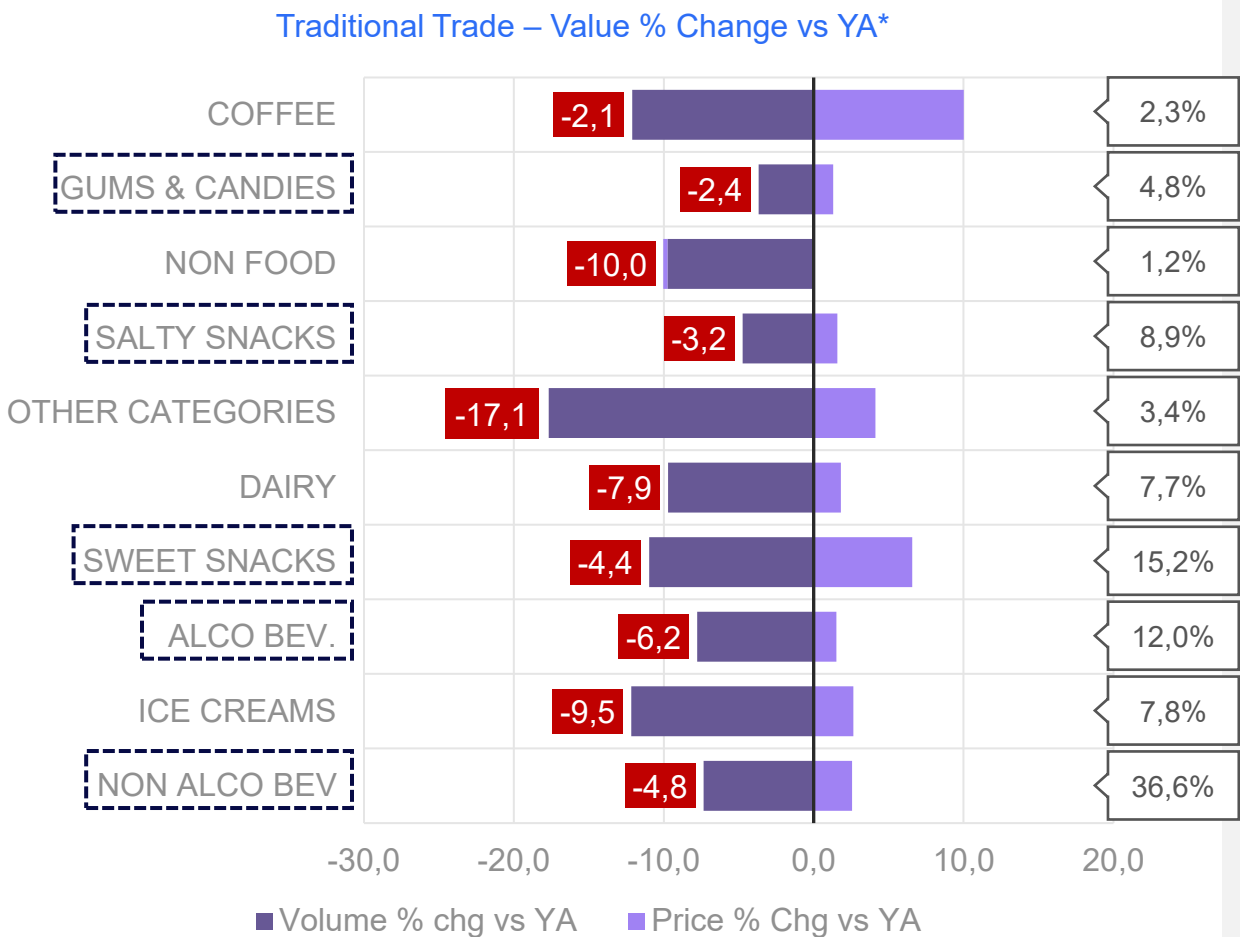
TSR – Store Type Value Importance (in %)



Source: ScanTrack Plus | Total Greece including Islands and Discounters | Reported period: MAT 23.08.26

2. Declining demand across categories continues to pressure Traditional Trade performance

Volume growth remains key contributor to Organized Trade expansion, lifting performance across most category groups.



■ % contribution to basket sales in value in Lower Trade

*Categories ranked in ascending order by their contribution to channel sales decline

Source: MarketTrack Total Greece Supermarkets + Superettes + Discounters + Convenience + Kiosks | Reported Period: MAT w/e 23/08/2026

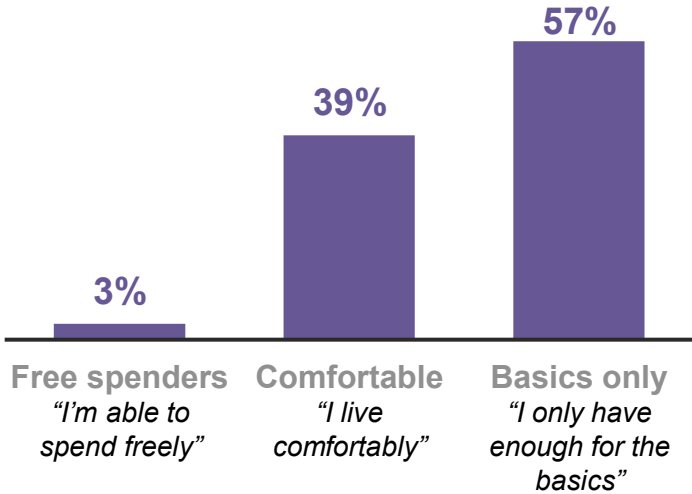
3. Higher prices continue to characterize Traditional Trade

On average consumers pay 52% more for buying a category in Traditional Trade vs. Organized Trade

Category	PI YA	PI	Val % Share
SOFT DRINKS	155	155	14,9
BEERS	143	144	11,6
WATER	188	186	8,6
CHOCOLATES	146	146	8,4
SPORT DRINKS	144	148	8,1
SNACKS	137	137	6,9
ICE CREAMS IMPULSE	147	151	6,0
MILK	143	139	5,1
PASTRY	145	146	3,6
BISQUITS	152	157	2,8
CANDIES	116	106	2,7
CHEWING GUMS	114	117	2,1
YOGURT	138	133	1,9
ICE CREAMS FAMILY	217	222	1,8
JUICES LONG.LIFE	193	190	1,5

Lower spending flexibility

Spending mentality
% respondents, Greece



Price Index vs Average Selling Price in Modern Trade (Organized Trade)
Source: NIQ MarketTrack | Total Greece Convenience + Kiosks | Reported period: MAT w/e 23/08/26 | NIQ Consumer Outlook 2026

Across a basket of leading impulse-consumption products, Traditional Trade continues to command a significant price premium.

Channel	Basket Price (in €)	Relative Price Index vs OT
Organized Trade	22.58	100
Traditional Trade	28.87	128
Convenience	28.48	126
Kiosks	29.89	132



Source: MarketTrack Total Greece Supermarkets + Superettes + Discounters + Convenience + Kiosks | Reported Period: MAT w/e 23/08/2026

Key trending insights



Traditional Trade* is declining, but consumers are not abandoning proximity shopping

Shoppers are increasingly choosing Superettes over Traditional Trade, shifting traffic away from Convenience stores and Kiosks while leaving the channel more dependent on impulse purchases.



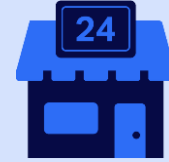
Consumer migration to alternative formats, combined with a shrinking store network and higher prices of TT, are gradually eroding the channel's performance

Superettes are emerging as the new destination for proximity shopping. The challenge is demand relocation, rather than demand destruction.



Traditional Trade remains substantially more expensive, while consumers become increasingly value-conscious

Ice cream, Water and Juices and Soft Drinks are the categories with the biggest price gap between the two channels.



Tobacco serves as a key performance buffer for Traditional Trade

New Generation Tobacco products continue to gain consumer adoption, reshaping the tobacco landscape and now representing almost one-third of all tobacco sales.

*Basket of selected categories

Thank you

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Insight name: Traditional Trade: Searching for a Spark