

Shop X MasterClass by **tdg**

THINKDIGITAL GROUP

MASTERING THE DIGITAL SHELF

21/09/2021



Η αγορά του Online Beauty & Personal Care στην Ελλάδα μέσα από τα καλάθια των καταναλωτών στο Pharma & Grocery

Έλενα Χαΐλαζοπούλου - Chief Product Officer, Deputy-CEO



eRetail Audit

Greek Online Sectors

e-Grocery



e-Pharmacy



e-Beauty



Market Size Estimation for S1 2021

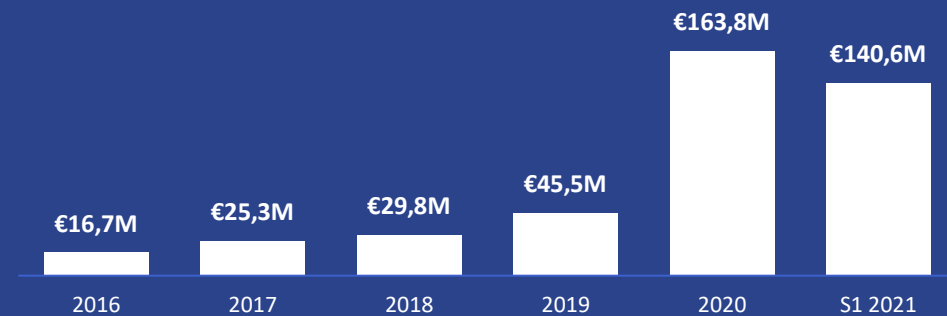
and Year over Year Growth compared to S1 2020

e-Grocery Turnover (incl. VAT)

€140,6M

+122%

Turnover Evolution by Year

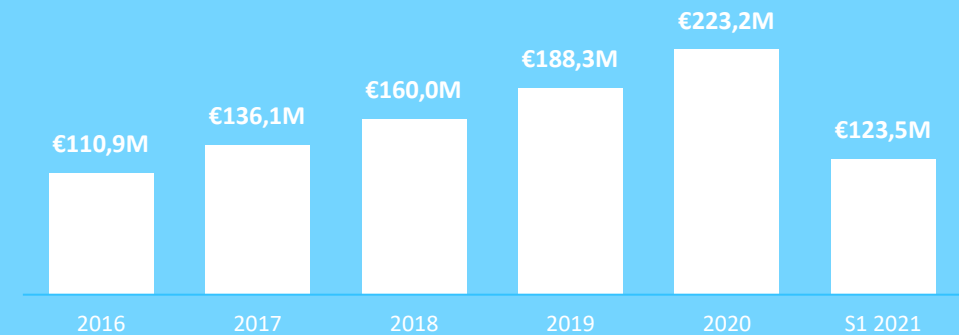


e-Pharmacy Turnover (incl. VAT)

€123,5M











+20%

Turnover Evolution by Year



Mega Categories Overview per Sector in S1 2021

e-Grocery

Category	Sales Weight out of Total Sales Value	Year over Year Growth in Sales Value Sales Value of Jan-Jun 2021 compared to Jan-Jun 2020	
Fresh Food	35%	+155%	
Basic Packaged Food	22%	+143%	
Cleaning Products & Paper for Household Use	11%	+133%	
Bottled Beverages, Soft Drinks, Water & Drink Mixes	10%	+173%	
Beauty & Health	6%	+144%	
Frozen foods	5%	+142%	
Other	4%	+139%	
Bakery	4%	+179%	
Baby & Kid	3%	+99%	
Pet Supplies	1%	+192%	

e-Pharmacy

Category	Sales Weight out of Total Sales Value	Year over Year Growth in Sales Value Sales Value of Jan-Jun 2021 compared to Jan-Jun 2020	
Beauty & Personal Care	49%	+32%	
Food Supplements & Vitamins	27%	+41%	
Kids & Babies	12%	+30%	
Health	10%	+24%	
All Others	2%	+26%	

Top Categories in Beauty & Personal Care

e-Grocery

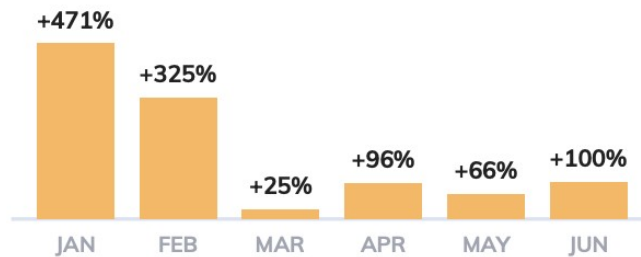
Body Cleansing

Sales Weight in Category

14,9%

S1 2021 YoY Growth in Sales Value

107,5%



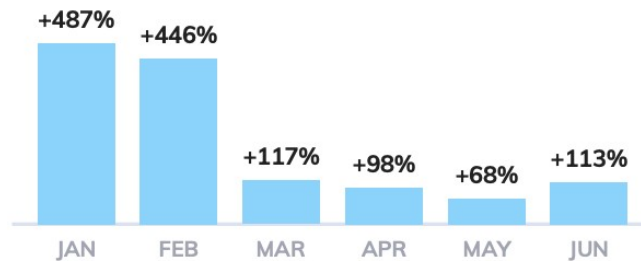
Shampoos for adults

Sales Weight in Category

7,8%

S1 2021 YoY Growth in Sales Value

150,8%



e-Pharmacy

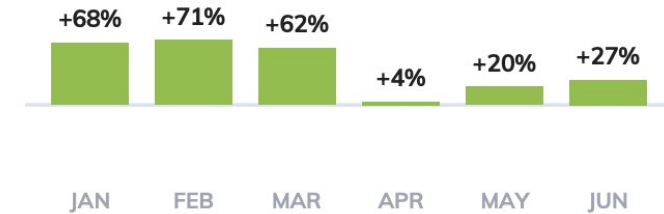
Face Care

Sales Weight in Category

41,8%

S1 2021 YoY Growth in Sales Value

37,7%



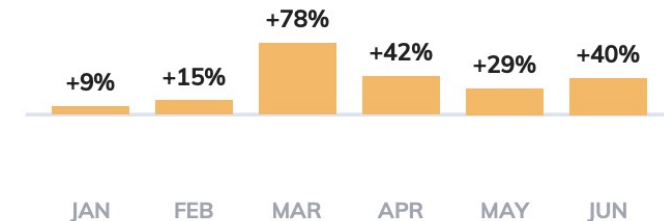
Suncare

Sales Weight in Category

16,1%

S1 2021 YoY Growth in Sales Value

36,6%



* Based on data from eRetail Audit market sample.

Basket Penetration of Beauty & Personal Care Categories

across all baskets of each sector

e-Grocery

Rank	Channel	S1 2021	S1 2020
45	Liquid Soaps	10,8% ▼	11,9%
65	Shower Gels (body wash)	7,4% ▼	8,0%
111	Hand Hygiene	4,3% ▼	5,5%
118	Face Cleansing	3,9% ▲	3,8%
127	Classic Toothpaste	3,7% ▼	4,0%

e-Pharmacy

Rank	Channel	S1 2021	S1 2020
1	Face Sunscreen	10,5% ▼	10,8%
2	Anti-Aging Day for Women	9,1% ▲	8,9%
6	Body Sunscreen	4,4%	3,9%
7	Anti-sebo Face Cleansing	4,3%	4,2%
8	Acne/ Anti-Seborrhoeic Care	4,0% ▲	3,4%

Average Basket Metrics per Sector in S1 2021

in baskets with at least one product from Beauty & Personal Care categories

e-Grocery

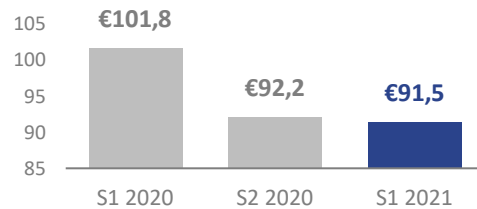
Average Basket Value

€91,5

+ €12,8

from the Average Sector Basket

Evolution by Semester



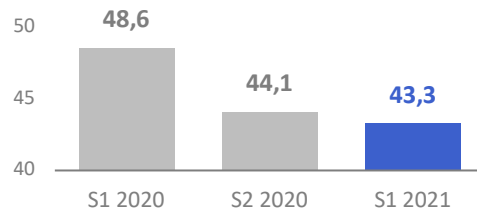
Average Basket Items

43,4

+ 5,9

from the Average Sector Basket

Evolution by Semester



e-Pharmacy

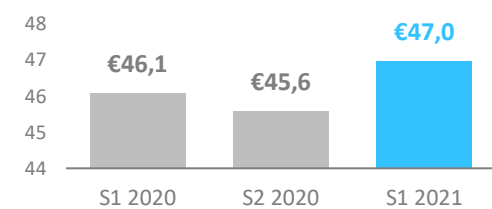
Average Basket Value

€47

+ €2,8

from the Average Sector Basket

Evolution by Semester



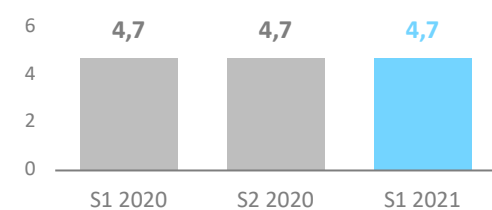
Average Basket Items

4,7

+ 0,3

from the Average Sector Basket

Evolution by Semester



Top 5 Categories in Basket Penetration

in baskets with at least one product from Beauty & Personal Care categories

e-Grocery

Channel	S1 2021	S1 2020
1 Toiler Paper	36,9% ▲	34,8%
2 Cheese Slices	36,6% ▲	33,6%
3 Paper Towels	35% ▼	35,8%
4 High Pasteurization Milk for Adults	34% ▲	32,3%
5 Fresh Packaged Cheeses	33,7% ▼	34,3%

e-Pharmacy

Channel	S1 2021	S1 2020
1 Face Sunscreen	16,3% ▼	16,4%
2 Anti-Aging Day for Women	14,3% ▲	13,9%
3 Body Sunscreen	6,7% ▲	5,9%
4 Anti-sebo Face Cleansing	6,6% ▲	6,4%
5 Acne/ Anti-Seborrhoeic Care	6,1% ▲	5,1%

Top 5 Marketing Channels with the Most Transactions

in baskets with at least one product from Beauty & Personal Care categories

e-Grocery

Channel	S1 2021	S1 2020
1 Direct	36,5% ▲	27,4%
2 Google CPC	27,1% ▲	26,7%
3 Organic	18,2% ▼	25,6%
4 Referrals	5,8% ▲	4,8%
5 Newsletters	2,3% ▼	3,8%

e-Pharmacy

Channel	S1 2021	S1 2020
1 Google CPC	34,4% ▲	28,3%
2 Organic	20,8% ▼	21,3%
3 Price Comparison Engines	17% ▼	22%
4 Direct	8,3% ▼	9,1%
5 Social Media	7,8% ▲	6%

Day & Hour with the Most Transactions in S1 2021

in baskets with at least one product from Beauty & Personal Care categories

e-Grocery

Day

Monday

Hours

**11:00 –
12:00**

Hour	MO	TU	WE	TH	FR	SA	SU
0	0,5%	0,5%	0,5%	0,5%	0,5%	0,4%	0,2%
1	0,3%	0,3%	0,3%	0,3%	0,3%	0,3%	0,1%
2	0,2%	0,1%	0,2%	0,1%	0,1%	0,1%	0,1%
3	0,1%	0,1%	0,1%	0,1%	0,1%	0,1%	0,0%
4	0,1%	0,1%	0,1%	0,1%	0,1%	0,0%	0,0%
5	0,1%	0,1%	0,1%	0,1%	0,1%	0,0%	0,0%
6	0,1%	0,1%	0,1%	0,1%	0,1%	0,1%	0,1%
7	0,2%	0,3%	0,3%	0,3%	0,3%	0,2%	0,1%
8	0,5%	0,5%	0,5%	0,5%	0,5%	0,4%	0,2%
9	0,9%	0,8%	0,8%	0,8%	0,8%	0,7%	0,3%
10	1,1%	1,0%	1,0%	1,0%	1,0%	0,9%	0,5%
11	1,2%	1,1%	1,1%	1,1%	1,1%	1,0%	0,6%
12	1,1%	1,0%	1,0%	1,1%	1,0%	1,0%	0,6%
13	1,0%	0,9%	0,9%	0,9%	0,9%	0,8%	0,6%
14	0,9%	0,8%	0,9%	0,8%	0,8%	0,7%	0,5%
15	0,9%	0,8%	0,8%	0,8%	0,8%	0,6%	0,6%
16	0,8%	0,8%	0,8%	0,8%	0,7%	0,5%	0,6%
17	0,8%	0,8%	0,8%	0,8%	0,8%	0,5%	0,6%
18	0,9%	0,8%	0,9%	0,9%	0,8%	0,5%	0,8%
19	1,0%	0,9%	1,0%	1,0%	0,9%	0,5%	0,9%
20	1,0%	1,0%	1,0%	1,0%	0,9%	0,4%	0,9%
21	1,0%	1,0%	1,1%	1,1%	0,8%	0,4%	1,0%
22	0,9%	1,0%	1,0%	1,0%	0,8%	0,4%	0,9%
23	0,7%	0,8%	0,8%	0,8%	0,7%	0,3%	0,8%

e-Pharmacy

Day

Sunday

Hours

**22:00 –
23:00**

Hour	MO	TU	WE	TH	FR	SA	SU
0	0,6%	0,6%	0,6%	0,5%	0,5%	0,5%	0,5%
1	0,3%	0,3%	0,3%	0,3%	0,3%	0,3%	0,3%
2	0,1%	0,1%	0,1%	0,1%	0,1%	0,1%	0,1%
3	0,1%	0,1%	0,1%	0,1%	0,1%	0,1%	0,1%
4	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
5	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
6	0,1%	0,1%	0,1%	0,1%	0,1%	0,1%	0,0%
7	0,2%	0,2%	0,2%	0,2%	0,2%	0,1%	0,1%
8	0,4%	0,4%	0,4%	0,4%	0,4%	0,3%	0,2%
9	0,8%	0,8%	0,8%	0,7%	0,7%	0,5%	0,4%
10	1,0%	1,0%	1,0%	0,9%	0,8%	0,7%	0,6%
11	1,1%	1,1%	1,1%	1,0%	0,9%	0,7%	0,7%
12	1,1%	1,1%	1,1%	1,0%	1,0%	0,8%	0,8%
13	1,0%	1,0%	1,0%	0,9%	0,9%	0,7%	0,8%
14	1,0%	0,9%	0,9%	0,9%	0,8%	0,7%	0,7%
15	0,9%	0,9%	0,9%	0,8%	0,8%	0,7%	0,7%
16	0,9%	0,9%	0,9%	0,8%	0,8%	0,7%	0,8%
17	0,9%	0,8%	0,8%	0,7%	0,7%	0,7%	0,8%
18	0,9%	0,8%	0,8%	0,7%	0,7%	0,7%	0,9%
19	0,9%	0,8%	0,8%	0,8%	0,7%	0,7%	0,9%
20	0,9%	0,9%	0,9%	0,8%	0,7%	0,7%	1,0%
21	1,0%	0,9%	0,9%	0,8%	0,7%	0,7%	1,0%
22	1,0%	1,0%	1,0%	0,9%	0,8%	0,7%	1,1%
23	0,9%	0,9%	0,9%	0,7%	0,7%	0,6%	1,0%



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