Required Report - public distribution

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Greece

Retail Foods

2012

Approved By:
Jim Dever
Prepared By:
Ornella Bettini

Report Highlights:
The Greek crisis has created a completely new retail grocery environment, with conditions in which many retailers and suppliers have never operated. In addition, Greece's high unemployment rate is having a negative impact on retail sales, as the austerity program. Supermarkets and cash and carry stores account for 90 percent of the total turnover of the foodstuffs sector in Greece, while grocery shops, mini markets, and small self-service stores take the remaining 10 percent.

Post:
Rome

SECTION I. MARKET SUMMARY

Greek Economy Overview

Greece finds itself in one of its most challenging periods in its post-war history. Greece is contending with sizeable government deficit (-10.8 percent of GDP in 2010, -9.6 percent estimated in 2011), increasing public debt (149 percent of GDP for 2010, 165 percent in 2011), and is entering its fifth year of recession. The economy shrank by more than 6 percent in 2011 after a contraction of 4.5 percent in 2010, resulting in a 15 percent contraction since the beginning of the recession. The protracted economic crisis has lead to a contraction in bank lending, project development and investment.

Due to its sizable debt and deficit, in May of 2010, Greece requested financial assistance from the European Commission (EC), the European Central Bank (ECB), and the International Monetary Fund (IMF) - the so-called "Troika." A multiannual financing package for Greece of €110 billion was announced, payable in installments through 2012. In exchange, Greece agreed to implement tough fiscal austerity measures and structural reforms designed to cut the budget deficit to 7.6 percent of GDP by the end of 2011. These included a hike in the top rate of the VAT, an increase in excise taxes and a steep cut in the pay of civil servants. Pension reforms also included a limit on early retirement, an increase in the retirement age to 65 for both men and women and an index linking benefits to prices.
By May 2011, it appeared highly likely that the original deficit target of 7.6 percent in 2011 would not be met. In an effort to plug a newly emerging deficit shortfall of €2 billion, the government agreed in September 2011 to levy an emergency tax on private property in 2011 and 2012. To appease its creditors, the government prepared a new economic-recovery program, including asset sales and spending cuts of €76 billion.

In October 2011, the EU agreed to a second multiannual financing package for Greece that was approved on February 21, 2012. On 14 March 2012, euro area finance ministers approved financing of the second Greek economic adjustment program for an amount of up to EUR 130 billion until 2014 - including an IMF contribution of EUR 28 billion - conditional on the implementation of another harsh austerity package, reducing the Greek spending with €3.3bn in 2012 and another €10bn in 2013 and 2014. Greece will hold a new election in June 2012 after politicians failed to form a government, prolonging a political crisis that is pushing it closer to bankruptcy and an exit from the euro. No party won an outright majority in Greece's May 6 election, leading to an impasse that has shaken financial markets and led to questions about Greece's ability to stay in the euro zone.

Structure of the Economy

With a population of approximately 11 million and a Gross Domestic Product (GDP) of about $305 billion, Greece is a relatively small country. Greece adopted the Euro as its new common currency in January 2002. Greece has a capitalist economy with the public sector accounting for about 40 percent of GDP and with per capita GDP about two-thirds that of the leading euro-zone economies. Greece has a predominately service economy, which accounts for over 79 percent of GDP. Tourism provides 15 percent of GDP. Immigrants make up nearly one-fifth of the work force, mainly in agricultural and unskilled jobs. Almost 8 percent of the world's commercial shipping is Greek-owned, making the Greek commercial fleet the largest in the world. Other important sectors include food processing, tobacco, textiles, chemicals (including refineries), pharmaceuticals, cement, glass, telecommunication, and transport equipment. Agricultural output has steadily decreased in importance over the last decade, accounting now for only 3.3 percent of total GDP compared to a 17 percent in the early 1990's.

The Retail Food Sector

The Greek crisis has created a completely new retail grocery environment, with conditions in which many retailers and suppliers have never operated. In addition, Greece's high unemployment rate is having a negative impact on retail sales, as the austerity program. Supermarkets and cash and carry stores account for 90 percent of the total turnover of the foodstuffs sector in Greece, while grocery shops, mini markets, and small self-service stores take the remaining 10 percent.

The market share and turnover of the smaller shops have been constantly declining in recent years, because of the rapid expansion and increase in the number of outlets of the s/m chains. The Greek food retail market is indeed showing signs of increasing saturation and consolidation. Larger multinational players are gradually squeezing small domestic producers out, although the country's geography ─with its numerous populated islands─ is beneficial to small local shops and businesses. It is important to note that, with the exception of cities of over 100,000 inhabitants, Greek law imposes a maximum size on retail developments according to local municipal population figures.

The Greek retail food industry is focused on major retail chains in urban areas, with the Attica region dominating with around 55 percent of national sales. However, hypermarket development in Greece remains restricted to specific areas, limited by the vast rural, island areas, and the lack of large cities in the country.

Supermarkets must continually develop new strategies in order to cope with increasing competition. Several operators have opened special departments selling mobile phones and electrical equipment. (i.e., Carrefour Marinopoulos has entered the travel and leisure market with the opening of in-store travel agency, Carrefour Travel).

Services that supermarkets provide include:

- Home Delivery: Orders are now received through telephone, fax, and Internet.

- Establishment of Cash and Carries: More than half of cash and carries established in the last two years belong to supermarket chains.

- Sale of 'new' products: Big supermarkets have opened special departments with "shop-in-shop" arrangements selling mobile phones, electronic, and electrical equipment.

- Development of ready-meals department: These departments have been expanded in many supermarkets with a variety of meals offered.

- Entrance into the travel and leisure market: Carrefour Marinopoulos has entered the travel and leisure market with the opening of in-store travel agency, Carrefour Travel.

Private label

Consumer loyalty to well-known brands has weakened, owing mostly to the economic downturn and partly to the increased availability of private label products. The introduction of own label products has been a relatively recent development in Greece, and during the last few years it has become a key element of the retail market. Own label products are currently estimated to account for approximately 20 percent of the sector's turnover. The practice was developed mainly by the major s/m as a solution to the rapid decline of their profit margins that reached a level of 1.5 percent, and did not allow for further discounts. The opening and growth of Dia and Lidl also contributed much to the development of those products.

Table 1: Grocery Retailers Company Shares (% Value 2007-2011)

Grocery Retailers	2007	2008	2009	2010	2011
Carrefour-Marinopoulos SA	7.5	7.7	7.7	8.6	8.8

Grocery Retailers	2007	2008	2009	2010	2011
Alfa-Beta Vassilopoulos SA	4.0	4.6	5.2	6.0	6.8
Sklavenitis, J & S, SA	3.5	4.1	4.3	5.0	5.5
Lidl Hellas & Co EE	4.0	4.0	3.9	4.1	4.8
Veropoulos Bros SA	2.7	2.7	2.8	3.2	3.4
Diamantis Masoutis SA	1.9	2.0	2.1	2.4	2.8
Metro SA	1.0	1.1	1.1	1.2	1.3
Chalkiadakis SA	0.4	0.4	0.4	0.5	0.6
Bazaar SA	0.3	0.3	0.4	0.4	0.4
OK Anytime Market SA	0.1	0.2	0.2	0.3	0.4
Atlantic SA	1.4	1.3	1.3	0.7	0.3
EKO SA	0.1	0.1	0.2	0.2	0.1
Motor Oil Hellas SA	-	-	0.2	0.2	0.1
Coffee Connection SA	0.1	0.0	0.0	0.0	0.0
Dia Hellas SA	1.6	1.6	1.5	-	-
Aldi Hellas EE	-	0.1	0.4	-	-
Ola Stores SA	0.1	0.1	0.1	-	-
Shell Co (Hellas) Ltd	0.2	0.2	-	-	-
BP Hellas SA	0.1	0.1	-	-	-
Plus Hellas EPE & Sia EE	0.2	-	-	-	-
Others	70.8	69.2	68.2	67.2	64.5
Total	100.0	100.0	100.0	100.0	100.0

Source: Euromonitor International

Consumer trends

The economic crisis in Greece is hitting dramatically consumer spending. With rising unemployment rates ─which currently stand at about 22 percent─ and price rises after two VAT increases last year, the spending power of Greek consumers has been reduced significantly. The retail food market has dropped in sales volume by 10 percent in 2011. Hypermarkets, supermarkets, and discounters performed better than smaller grocers (convenience stores, forecourt retailers, and kiosks) which suffered from the rising need for lower prices that drove consumers to the best-price, larger grocers. Consumers continue to buy the essential items while taking advantage of any promotional offerings. In addition, consumers are turning increasingly towards private label items that combine product quality with the lowest prices. On-line shopping is continuing to grow, but still represents a small base.

Table 2: Sales in Grocery Retailing by Category (EUR mln)

Grocery Retailing	2006	2007	2008	2009	2010	2011
Modern Grocery Retailers	12,050	12,599	12,908	12,585	11,313	10,522
- Convenience Stores	148	177	211	212	201	190
- Discounters	1,426	1,518	1,524	1,545	967	1,028
- Forecourt Retailers	125	134	137	136	128	78
- Hypermarkets	820	855	873	849	820	772
- Supermarkets	9,531	9,914	10,164	9,843	9,197	8,452
Traditional Grocery Retailers	12,920	13,621	13,855	14,012	12,571	10,689
- Food/Drink/Tobacco Specialists	4,352	4,516	4,567	4,637	4,209	3,591
- Independent Small Grocers	2,427	2,4056	2,299	2,286	2,017	1,708
- Other Grocery Retailers	6,141	6,700	6,990	7,088	6,345	5,390
Grocery Retailers	24,970	26,220	26,763	26,596	23,884	21,210

Source: Euromonitor International

Table 3: Sales in Grocery Retailing by Category (% Value Growth)

Grocery Retailing	2010/11	2006-11 CAGR	2006/11 Total
Modern Grocery Retailers	-7.0	-2.7	-12.7
- Convenience Stores	-5.4	5.1	28.0
- Discounters	6.3	-6.3	-27.9
- Forecourt Retailers	-38.7	-8.9	-37.2
- Hypermarkets	-5.8	-1.2	-5.8
- Supermarkets	-8.1	-2.4	-11.3
Traditional Grocery Retailers	-15.0	-3.7	-17.3
- Food/Drink/Tobacco Specialists	-14.7	-3.8	-17.5
- Independent Small Grocers	-15.3	-6.8	-29.7
- Other Grocery Retailers	-15.0	-2.6	-12.2
Grocery Retailers	-11.2	-3.2	-15.1

Source: Euromonitor International

Advantages and Challenges for U.S. Exporters in Greece

Advantages	Challenges

Modern mass grocery retail outlets are increasing their market share, which means that customers have access to a wider product range.	Geographical challenges, including a large rural and island-based population, will continue to hamper the development of larger retail formats that can stock wider varieties of food products.
Tourism provides a seasonal boost to retail and food and drink sales.	Greek financial crisis and social disturbances have damaged Greece's reputation as a tourist destination and have hit consumer confidence.
Greek importers favor U.S. products because of good quality and wider variety.	Average tariff levels remain high, increasing products' price. GM labeling requirements, on the other hand, result in consumer concern.
Greek food industry relies on imported ingredients, many from the U.S.	The Greek Ministry of Agriculture is dominated by anti-import thinking. Frequently, GOG impose non-tariff barriers to prevent imports of Ag Products in support of domestic production.

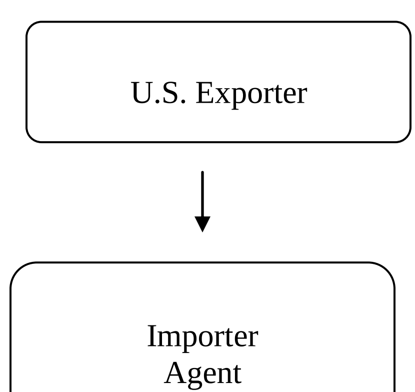
SECTION II. ROAD MAP FOR MARKET ENTRY

A. Super Stores, Supermarkets, Hypermarkets, Club, and Warehouse Outlets

Entry Strategy

Eighty per cent of Greece's import trade is handled through sales agents or distributors. Distributors operate on wholesale (and in some cases, retail) basis with exclusive sales rights for certain districts or for the entire country. As a member of the EU, the Common Agricultural Policy (CAP) governs Greece's agricultural sector. Similarly, Greece employs the same tariffs and border measures as the other EU member states. Products imported into Greece must meet all Greek and EU food safety and quality standards, as well as labeling and packaging regulations. It is important to work with experienced importers, and/or have an agent to work with Greek regulatory authorities to ensure the acceptability of specific products. Personal relationships and language ability are of value when conducting business transactions. It is also advisable for the agent to contact health authorities at the port of entry as interpretation of health directives may vary from port to port. For more information on Product Trade Restrictions, Food Standards and Regulations, please refer to Post's FAIRS GAIN Report GR1207.

Market Structure



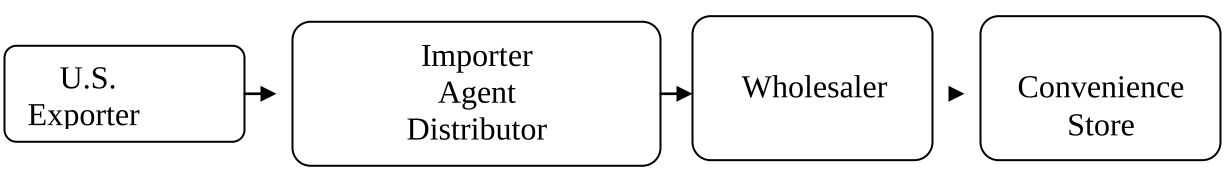
- Food products are usually imported in Greece by an importer or agent, who may also be a wholesaler and/or distributor. The importer is responsible for the delivery of products to their distribution center.
- Supermarkets act as importers too.
- The agents usually undertake promotional campaigns for the products they import.
- Most of the distributors have nationwide distribution channels.

B. Convenience Stores, GAS Marts, Kiosks, and Traditional Markets “Mom and POP”

Entry Strategy

Convenience and other small stores that cater to every day needs exist throughout the neighborhoods of Athens and its suburbs. These are beverage shops, mini markets, and kiosks ─most of which have grown into small general stores. They cater to the emergency needs of area inhabitants for products of daily consumption, particularly when big stores are closed, or when it is impractical to pay a visit to the supermarket. These shops can be called "small points of sale" and constitute an integral traditional part of the Greek market.

Market Structure



- Convenience stores usually sell dairy products, sodas, beverages, dry grocery products, and a limited range of non-food products.
- Gas station mini markets sell newspapers and magazines, tobacco, snacks, dairy products, ice cream, and some dry grocery items.
- Kiosks sell tobacco, newspapers, snacks, and ice cream.

Retail Definition

Hypermarket: is a very large establishment engaged in retailing various types of food and non-food necessities within a structure of 2,500 to 10,000 square meters of space.

Supermarket: is a medium to large establishment engaged in retailing mainly food items within a structure of 400 to 2,500 square meters of space. A supermarket can also offer some added-value services, such as dry cleaning or in-store ATMs, etc.

Discount store: is an establishment mainly engaged in retailing private and unbranded labels at a discount price, within a structure that can range from 300 to 1,000 square meters of space.

Convenience store: is a small retail store that is open long hours and that typically sells a limited variety of food and pharmaceutical items.

Traditional Mom + Pop: are privately owned small establishments engaged in retailing food and some non-food necessities within a structure of less than 100 square meters of space.

SECTION III. COMPETITION

Greece's financial crisis is affecting all areas of the economy, including agriculture, which accounts for 3.3 percent of total GDP. Greece's main competitor is the European Union. The Netherlands, Germany, France, and Italy are the leading country suppliers in the food and agricultural trade. The leading importers of Greece's goods are Italy, Germany, Turkey, Bulgaria, and United Kingdom. Greek primary agricultural imports include cheese, beef, wheat, pork, and sugar. Olives dominate Greece's food exports, followed by canned peaches, cotton, olive oil, and cheese. In 2011, tree nuts and soybeans were the leading U.S. agricultural exports to Greece, while processed fruits and vegetables, cheeses, and olives were the leading Greek agricultural exports to the United States.

Bilateral Ag Trade 2011	
U.S. Ag Exports to Greece $122 M	**U.S. Ag Imports from Greece $ 249 M**
- Tree Nuts: $25 million	- Canned Olives: $88 million
- Soybeans: $21 million	- Cheese: $23 million
- Tobacco: $12 million	- Canned Peaches: $20 million

- The United States exports both Bulk and Consumer products to Greece.
- Greece exports mainly Consumer products to the United States.

U.S. Imports of Agriculture, Fish, and Forestry products from Greece
FY 2007-2011
(In Thousands of Dollars)

Product	2007	2008	2009	2010	2011	%Chg.
Processed Fruit and Vegetables	126,985	114,159	100,860	125,693	143,811	14.41
Seafood Products	9,290	12,635	14,108	16,656	24,691	48.24

Cheese	17,873	18,814	20,500	20,273	23,198	14.43
Vegetable Oil	22,128	22,184	19,738	17,628	17,623	-0.03
Wine and Beer	10,228	10,086	9,995	9,956	11,056	11.0
Snack Foods	17,526	21,746	8,432	4,579	5,847	27.71
Hides and Skins	1	92	132	4,129	4,928	19.3
Tobacco	30,349	29,374	22,717	6,775	4,041	-40.3
Roasted and Instant Coffee	1,805	1,691	2,234	2,417	2,338	-3.26
Other Dairy Products	26,693	26,542	887	1,468	1,544	5.17
Ag, Fish and Forest Products	**272,388**	**267,337**	**206,287**	**216,693**	**248,981**	**14.90**

Source: BICO

U.S. Exports of Agriculture, Fish, and Forestry products to Greece
FY 2007-2011
(In Thousands of Dollars)

Product	2007	2008	2009	2010	2011	%Chg.
Tree Nuts	47,268	61,292	36,446	36,384	25,415	-30.15
Soybeans	4,519	9,661	14,134	8,406	21,078	150.73
Hides and Skins	9,511	8,575	2,960	8,742	13,550	55.00
Tobacco	30,653	23,157	17,278	21,658	12,318	-43.19
Fish Products	6,961	7,582	8,739	5,229	6,132	17.28
Processed Fruit and Vegetables	3,192	3,501	3,752	3,788	4,851	28.06
Hardwood	12,971	15,279	8,670	9,559	4,737	-50.45
Snack Foods	3,036	3,464	2,670	3,069	3,495	13.87
Pulses	1,201	1,875	1,910	1,242	3,122	151.26
Poultry Meat	7,788	9,917	9,523	6,121	2,795	-54.33
Ag, Fish and Forest Products	**157,030**	**176,329**	**146,137**	**128,774**	**121,718**	**-5.48**

Source: BICO

SECTION IV. BEST PRODUCT PROSPECTS

A. U.S. products in the Greek market that have good sales potential

- Frozen food
- Frozen and salted fish
- Tree nuts
- Pulses

B. Products not present in significant quantities but which have good sales potential:

- Meat
- Wine
- Beer
- Juices and soft drinks
- Organic foods
- Dairy products
- Chocolate, ice cream, and confectionary
- Food ingredients
- Snack foods
- Readymade meals

C. Products not present because they face significant trade barriers:

- Turkey and other poultry products
- Beef meat and products
- Processed food products containing biotech ingredients
- Low volume high value food ingredients
- Corn oil
- U.S. milling wheat

SECTION V. POST CONTACT AND FURTHER INFORMATION

USDA FAS Contacts in Rome, Italy

American Embassy
Foreign Agricultural Service
Via Vittorio Veneto 119/A
00187 Rome
Italy

Tel: +011 39 06 4674 2307
Fax: +011 39 06 4788 7008
E-mail: agrome@fas.usda.gov
agathens@fas.usda.gov

Webpage: http://italy.usembassy.gov/agtrade.html

Counselor for Agricultural Affairs
Jim Dever

Agricultural Assistant
Ornella Bettini

Key Greek Government Agencies and Associations

Ministry of Rural Development and Food
Directorate of Plant Production
Phytosanitary and Plant Protection Division
150, Sygrou Avenue
17671 Athens-Kallithea
Greece
Phone: +30 210 9287232; +30 210 9287233
Fax: +30.210.9287234
E-mail: syg059@minagric.gr; syg042@minagric.gr

Greek Ministry of Economy and Finance
General Secretary of IT-Systems
Section of Customs
1, Chandri Street
GR 18346 Athens Greece
Tel: +30 210 480 2400
Fax: +30 210 480 2400
E-mail: a.manta@gsis.gr, info@gsis.gr
Website: http://www.gsis.gr

Hellenic Food Safety Authority (EFET)
Central Division
124, Avenue and 2 Iatridou
11526 Ambelokipi PC Athens
Greece
Tel: +30 210 6971 500
Fax: +30 210 6971 501
E-mail: info@efet.gr
Website: www.efet.gr

General Chemical State Laboratory
Directorate of Foods
16, A. Tsoha Str, GR 11521 Athens
Greece

Tel.: +30 210 6479 251
Fax: +30 210 6467 725
Email: gxk-foodiv@ath.forthnet.gr
Website: http://www.gcsl.gr/index.asp?a_id=136

General Customs and Excise Department
10, Kar. Serbias
GR-10184 Athens
Greece
Tel: +30 210 3375 000; 210 3375 714; 210 3375 715
Fax: +30 210 3375 034
E-mail: gdcustom@otenet.gr
Website: http://www.e-oikonomia.gr

Payment and Control Agency for Guidance and Guarantee Community Aid (OPEKEPE)
241, Acharnon
GR-10446 Athens
Greece
Tel: +30 210 212 49 03
Fax: +30 867 0503
Website: http://www.opekepe.gr

Hellenic Export Promotion Organization (HEPO)
86-88, Marinou Antypa
163 46 Hellioupolis Athens
Greece
Tel.: +30 210 9982100
Fax: +30 210 9969100
Website: www.hepo.gr
E-mail: infocenter@hepo.gr

Pan-Hellenic Confederation of Unions of Agriculture Cooperatives (PASEGES)
26, Arkadias
11526, Athens
Greece
Tel: +30 2107499425 – 0030 2107499445
Fax: +30 2107779313
E-mail: info@paseges.gr ; papadopoulou@paseges.gr
Website: www.paseges.gr

Hellenic Association of Frozen Food
226, Pireos Str.
17778 Tavros, Athens
Greece
Tel. +30 210 3423 287

Fax: +30 210 3452 098
E-mail: pasekt@ath.forthnet.gr

SESME – Supermarket Association
7 Andrianou Str.
15451 Neo Psychico, Athens
Greece
Tel. +30 210 6756 618
Fax: +30210 67 56 389
E-mail: sesme@ath.forthnet.gr

Trade Events in 2012

AGROTICA 2012
24th International Fair for Agricultural Machinery, Equipment, and Supplies
Date: February 1-5, 2012
Keeping its promise every two years, the biggest international meeting of professionals from the agricultural sector presents the latest developments in Machinery, Equipment, and Supplies from all over the world.
Venue: International Exhibition Center of Thessaloniki
Organization: HELEXPO S.A.
Tel.: +(30)-(2310)-291101
Fax: +(30)-(2310)-291551
Email: agrotica@helexpo.gr
Website: http://www.helexpo.gr

HO.RE.CA
7th Hotel – Restaurant – Cafe Exhibition
Date: February 4-7, 2012
HORECA offers a complete overview of all new products for the provisioning and equipment of every foodservice and hospitality company. The show is organized under the auspices of main professional organizations such as the Hellenic Chef's Association, the Hellenic Chamber of Hotels, the Attica Hotels Association, and the Ministry of Tourism and Culture.
Venue: Expo Athens
Organizer: Forum S.A.
Tel.: +(30)-(210)-5242100
Fax: +(30)-(210)-5246581
E-mail: info@forumsa.gr
Website: http://www.forumsa.gr

IFDTEX
25th International Food, Drink, and Technology Exhibition
Date: March 9-11, 2012
Long established as Greece's leading specialized food and drink fair, the International Exhibition of Food and Drink (IFDEX) brings together the full range of producers, distributors, and brand-owners to present their products to a national, regional, and international audience of retailers, wholesalers, restaurants, and hoteliers.
Venue: Metropolitan Expo, Athens
Organizer: Mack Brooks Hellas A.E.
Tel.: +(30)-(211)-1069350
Fax: +(30)-(211)-1069351
E-mail: ifdex@mackbrookshellas.gr
Website: http://www.mackbrookshellas.gr

ARTOZYMA
7th International Exhibition for Bakery – Confectionery – Raw Materials – Equipment – Products
Date: March, 9-12, 2012
Venue: International Exhibition Center of Thessaloniki
Organization: HELEXPO
Tel: + (30)-(2310)-291201
Fax: + (30)-(2310)-291658
Email: artozyma@helexpo.gr
Website: http://www.helexpo.gr

MEAT DAYS 2012
Date: June 22-24, 2012
Meat Days aspire to become top meeting event in international scope, where all commercial and scientific information will be gathered along with the technological and innovative solutions. A multi-event, where the people of the meat market, poultry, meat and products will meet with experts not only from Greece but also from abroad.
Venue: Metropolitan Expo, Athens
Organizer: O.mind Creatives
Tel.: +(30)-(210)-(9010040)
Fax: +(30)-(210)-(9010041)

E-mail: info@omind.gr; info@meatplace.gr
Website: http://www.meatdays.gr/en/organotes/omind/

PRIVATE LABEL 2012
2nd Exhibition for Labels Products
Date: November 2-3, 2012
Private Label-Athens is a meeting ground for producers and trade buyers to interact and develop a valuable partnership. It is a unique platform for exhibitors to showcase foodstuffs, beverages, hot beverages, beauty & hygiene products, household products, clothing, D.I.Y. products, and specialized press. It is a good opportunity for the wholesalers, suppliers, and retailers to promote their private label business.
Venue: Athens International Exhibition Centre
Organizer: HELEXPO
Tel.: +(30)-(2310)-291142
Fax: +(30)-(2310)-291692
Email: privatelabel@helexpo.gr
Website: www.helexpo.gr

BIOLOGICA
5th Exhibition of Organic Products
Date: November 2-4, 2012
BIOLOGICA is a fair dedicated exclusively to organic products. Visitors will have the opportunity to directly contact producers and learn about methods of cultivation and production of the products.
Venue: Thessaloniki International Exhibition Centre
Organizer: HELEXPO
Tel.: +(30)-(2310)-291201
Fax: +(30)-(2310)-291658
Email: biologica@helexpo.gr
Website: http://www.helexpo.gr

PHILOXENIA 2012
28th International Tourism Exhibition
Date: November 23-25, 2012
PHILOXENIA Expo aims at introducing the variety of the touristic climate and develops the environment of tourism in the region in order to attract as much visitors and tourists as they can to visit the outstanding features of Greece.
Venue: Thessaloniki International Exhibition Centre
Organizer: HELEXPO S.A.
Tel.: +(30)-(2310)-291293
Fax: +(30)-(2310)-291656
Email: philoxenia@helexpo.gr
Website: http://www.helexpo.gr

HOTELIA Expo & Clean 2012
Date: November 23-25, 2012

HOTELIA is the definitive event for the restaurant, hotel, and motel industry. It is the essential showcase for hotel, leisure and related products, services, and technologies.
Venue: Thessaloniki International Exhibition Centre
Organizer: HELEXPO S.A.
Tel: +(30)-(2310)-291293
Fax: +(30)-(2310)-291656
Email: philoxenia@helexpo.gr
Website: http://www.helexpo.gr