



Shoptalk Europe 2025 Recap

Key Takeaways & Trends Shaping the Future of Retail

SHOPTALK
EUROPE

What's Shaping the Future of Retail Across Europe

Shoptalk Europe 2025 served as a powerful barometer of both optimism and realism in European retail. From emerging technologies like agentic AI to legacy challenges like price agility and supply chain volatility, the conversations at Shoptalk revealed an industry balancing bold transformation with operational pragmatism. With executive insights from leading retailers like Ahold, Chalhoub Group, Tendam, Tesco, and Weleda, and disruptive shifts driven by platforms like TikTok Shop and Temu, the conference underscored that customer experience, agility, and data-led personalization remain the key battlegrounds for growth.



Top Trends from Shoptalk 2025



Customer-Centric Transformation is Accelerating

Retailers are reorganizing around the customer—not the channel.

- ✓ Retailers are evolving from omnichannel to channel-less experiences that follow the customer journey seamlessly. Example: Tendam's loyalty club structure personalizes communication across each of its brands, placing the customer—not the product—at the center.
- ✓ Personalization is being redefined from transactional to emotional and contextual, as seen in Tesco's in-store initiatives to prevent "sleep shopping" by creating more engaging environments.
- ✓ To truly deliver relevance, retailers are focusing on real-time behavioral data, not just historical purchase patterns. Holland & Barrett uses NPS and CX data to understand why customers are engaging or disengaging.

A New Value Exchange is Redefining Loyalty

Customers are increasingly aware of the value of their data, attention, and time.

- ✓ Consumers expect transparency, reciprocity, and utility in exchange for their engagement and information. Ahold Delhaize's apps in Belgium collect opt-in data from 70% of users, offering hyper-localized deals within a 10-meter radius.
- ✓ Loyalty programs are evolving to reflect a more emotional, values-driven relationship with the shopper. Tendam's loyalty members represent 75% of sales, proving the power of emotionally engaged customers.
- ✓ Retailers are rethinking incentives: not just points, but access, personalization, and recognition. MediaMarktSaturn gamifies KPIs for employees to translate great service into lasting loyalty.

Pricing Agility is Essential in a Volatile Economy

In a high-cost environment, pricing is both a science and a CX strategy.

- ✓ AI-powered markdowns and dynamic pricing (e.g., real-time electronic shelf pricing) are becoming mainstream in Europe. Ahold uses auto-discounts every 15 minutes based on expiration and demand.
- ✓ Retailers are developing hyper-local pricing strategies that respond to real-time inventory and local consumer needs.
- ✓ Affordability messaging is shifting from lowest price to smart value. H&M and Harrods both balance efficient pricing with exceptional in-store storytelling to emphasize value.

GenAI is the New Retail OS

AI is now foundational to how retailers operate, innovate, and communicate.

- ✓ Leading brands like Tendam and Weleda are deploying GenAI to automate personalized journeys and digital marketing content.
- ✓ Agentic commerce—AI shopping assistants that guide discovery—is growing, especially via TikTok Shop and other social-first channels.
- ✓ GenAI is enhancing productivity across supply chain and support. Salesforce and Weleda are using AI to minimize churn and manage unexpected demand spikes.

Search, Discovery & Social Are Merging

The shopping journey is more fragmented than ever—and search now starts with scroll.

- ✓ Social platforms are redefining discovery. 20% of adults in Europe's top five markets have made purchases via social platforms.
- ✓ TikTok Shop was one of the most talked-about disruptions at the show—brands are both excited and challenged by its viral unpredictability.
- ✓ The distinction between media and commerce is disappearing. L'Oréal is optimizing PDPs and keywords to align with AI-driven search models.

Retail Media Is Retail's Biggest Revenue Opportunity

Retailers are monetizing their data, audience, and digital real estate more effectively than ever.

- ✓ With 70% app penetration in Belgium, Ahold offers CPGs a highly targeted and measurable ad ecosystem.
- ✓ CPG partners want closed-loop measurement—and are eager to fund it if it drives conversion.
- ✓ Retail media is now integrated into loyalty, apps, and even in-store formats.

Physical Stores Are Reinventing Themselves

The store is no longer just a point of sale—it's a platform for brand, data, and experience.

- ✓ Rituals' Mind Oasis in Amsterdam blends wellness, purpose, and storytelling in a sensory retail environment.
- ✓ Shein and Temu are redefining fast fulfillment by linking online demand with physical logistics.
- ✓ Weleda's focus on biodynamic agriculture and gardens reinforces emotional connection with consumers.

Post-Purchase is the New Loyalty Battleground

Returns, refunds, and support experiences are now make-or-break moments.

- ✓ Chalhoub Group offers middle-of-the-night luxury deliveries during Ramadan, emphasizing extreme convenience.
- ✓ MediaMarktSaturn uses post-purchase data and in-store feedback to improve loyalty, with NPS tied to employee bonuses.
- ✓ Holland & Barrett identifies pain points post-purchase and uses them to iterate quickly. "Every solved problem is a growth opportunity."



Operational Agility is Mission-Critical

Retailers must balance short-term responsiveness with long-term vision in an era of volatility.

- ✓ Harrods' CEO Michael Ward noted the challenge of long-term forecasting: "It's hard to predict three years out, even at our level."
- ✓ Ahold uses AI to assess candidates in 8 minutes and has automated ordering for 17,000 SKUs.
- ✓ Tech must be intuitive. Tendam's workforce tech is designed for usability by people without technical backgrounds.

The Retailer Perspective: What's Next?

Retail leaders are recalibrating for resilience, not just growth. They recognize the need for unified commerce strategies that bring together online, offline, and social. Many are doubling down on loyalty programs, workforce empowerment, and retail media to offset economic challenges.

As Marc Carena from Mars shared: “We plan to grow from €20B to €30B by 2030. That requires mental and physical availability for the consumer—everywhere they look.”

Temu and Shein are further redefining supply chain speed and product discovery. Meanwhile, local production and sustainability remain strong themes as a hedge against global shocks.



The Speakeasy

Incisiv's Speakeasy Dinner at Nobu brought together over 40 senior retail executives for a candid conversation on what's next in AI, loyalty, and customer experience. Guests shared practical challenges and bold bets, from A/B testing loyalty perks to building agentic AI tools for product discovery.

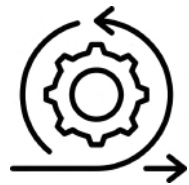
The informal setting sparked honest dialogue—on how fast to innovate, how deeply to personalize, and how to scale great ideas across regions.



The macro and micro signals from Shoptalk Europe 2025 offer a clear direction



Key Takeaways



Agility and efficiency aren't tradeoffs—they're foundational for delivering high-touch customer experiences at scale.



Customer experience innovation is accelerating, from personalized journeys to emotionally resonant store design.



First-party data is now the currency of modern retail—from loyalty to media to AI.



Technology's impact is real, but success hinges on adoption: both customers and employees need it to feel intuitive.



Retail's future is blended physical and digital, emotional and operational, branded and personalized.



In a word? **Unified**. The most successful retailers are making retail feel whole again.

Final Thoughts & Looking Ahead

Retail is in a period of convergence: between efficiency and engagement, physical and digital, automation and personalization. European retailers are navigating this transformation with pragmatism, creativity, and increasing urgency.

2025 will be the year to watch the full-scale rollout of agentic AI, a new wave of in-store technology, and bold experiments in loyalty and retail media. The brands that win will be those who make complexity feel effortless for both their customers and their teams.

To succeed in 2026, retailers must seamlessly integrate AI, prioritize transparency and trust, and create immersive, hyper-personalized shopping experiences.

Adaptability, agility, and a relentless focus on the customer will define the next generation of retail leaders.





ABOUT INCISIV

Incisiv is a peer-to-peer executive network and industry insights firm for consumer industry executives navigating digital disruption.

Incisiv offers curated executive learning, digital maturity benchmarks and prescriptive transformation insights to clients across the consumer and technology industry spectrum.

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