

TRENDS SHAPING 2026

by **HAVAS**
Commerce



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EDITO.

Retail moves quickly — and our newsletter has spent the past year keeping pace.

Throughout this year, our Havas Commerce newsletter has captured the most revealing signals from the global retail landscape. By monitoring launches, technologies and the most innovative brand strategies, we've built a continuous, real-time view of how commerce is transforming.

In this 2025 edition of the Trend Book, we have distilled our findings into six main trends that define the direction of commerce in the year ahead. Each trend reflects the most significant shifts shaping the industry, offering a clear lens through which to understand what's emerging and how the industry can anticipate change.

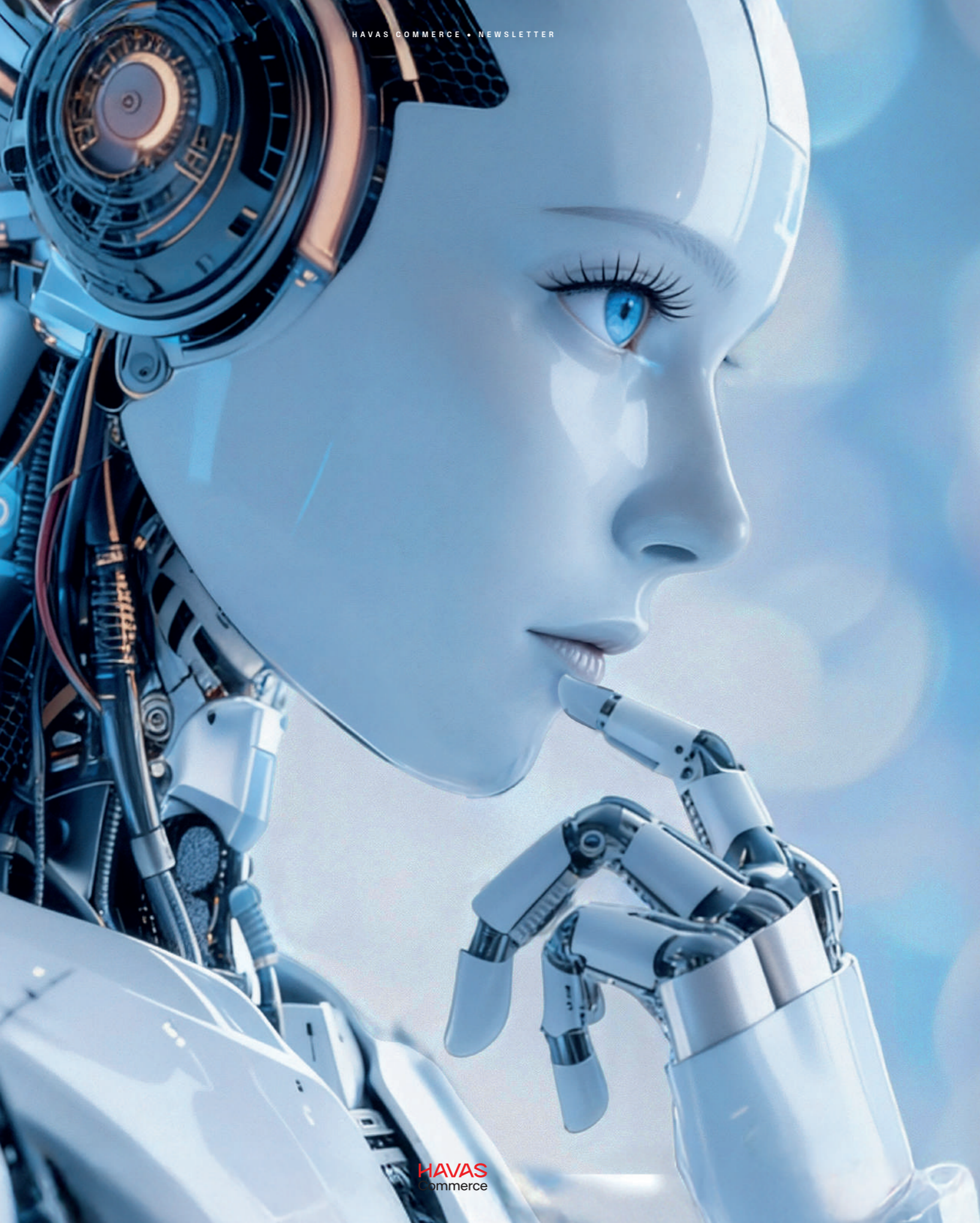
More than a compilation, this document captures the collective intelligence of our monthly reporting. It is an invitation to step back, rethink the rules, and anticipate the new realm of commerce.

I hope the 2025 Trend Book encourages you to explore new possibilities and make your next moves with confidence.

Thank you for being with us on this journey.

Vincent Mayet
Havas Commerce Founder

A handwritten signature in black ink that reads "V. Mayet".



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SCETTING THE SCENE

THE ERA OF CONSCIOUS CONSUMPTION

IN 2026, THE FUTURE IS SHAPED BY THE SCARS OF THE PAST.

Five years after COVID-19, consumption has fundamentally changed. What Havas Commerce identified in the very first weeks of lockdown the fragility of global supply chains and structural dependence on China has since become undeniable. Shortages of masks, sanitizers, and everyday staples left a lasting imprint on collective memory. According to the Havas Commerce 2025 Barometer, 74% of consumers worldwide say the pandemic permanently altered how they consume.

While the war in Ukraine intensified price pressure, its impact was less systemic than COVID-19, which acted as a true catalyst. A succession of shocks forced a collective reckoning. Western economies rediscovered their dependencies. Brands confronted the limits of their operational models. And consumers rediscovered their power of choice.

FROM CRISIS TO STRATEGY: THE RISE OF THE TACTICAL CONSUMER

Years of constrained purchasing power have given way to a new mindset. Today's consumer is no longer reactive but strategic. According to Havas Commerce, 68% of European households say they now systematically weigh value against pleasure, while 59% devote more time to planning their purchases. Rational and emotional trade-offs are no longer exceptions. They have become the default mode of everyday decision-making.

1

CHAPTER

8 SHIFTS DEFINING THE NEW ARCHITECTURE OF CONSUMER CHOICE FOR 2026-2027

8 DEFINING CONSUMER BEHAVIORS FOR 2026-2027

1 ARBITRATION BECOMES THE PRIMARY DRIVER OF CHOICE

Choosing now means prioritizing. Consumers cut back on the unnecessary while protecting a small number of meaningful pleasures aligned with their values travel, culture, quality food, personal passions. More than six in ten consumers use at least one comparison tool before buying, while cashback and cash-based loyalty programs grew by 23% between 2023 and 2025.

2 HEALTH AS A LIFESTYLE, NOT A CONDITION

Health, vitality, and longevity now sit at the heart of consumption. Eighty-two percent of consumers globally integrate a health criterion into their purchasing decisions. Functional nutrition, sleep, stress management, mobility, and overall vitality have become key loyalty drivers. The "better for me" segment has grown by 11% annually since 2022.

3 LESS BUT BETTER: SOBRIETY BY CHOICE

"Less but better" has shifted from constraint to aspiration. Fifty-seven percent want to reduce the number of brands they buy, 52% have cancelled at least one digital subscription, and 44% actively seek simpler, more essential offers. Short assortments, ready-to-use solutions, and brands with clear, readable narratives answer a growing desire for clarity and authenticity.

4 FROM HYPER-CHOICE TO HYPER-SELECTION

Artificial intelligence is closing the era of endless choice. Marketplaces once thrived on abundance. Millions of products for a single need. The next phase is intelligent selection. Consumers define precise, personal, and contextual criteria sustainability, origin, value, impact and algorithms act as curators, filtering and prioritizing what truly fits. Commerce moves from too much to just right. Less volume, more relevance. Less stock, more meaning.

5 NEW FRUGALITY AND THE RISE OF CIRCULAR PRIDE

Frugality has become a marker of modernity. What once signaled restriction now expresses confidence and discernment. According to the Havas Commerce Global Observatory 2025, one in three circular consumption acts second-hand, refurbished, rental, repair is driven primarily by meaning rather than price. Refurbished goods grew by 34% between 2020 and 2025, short-term rental by 48%, and repair services are expanding rapidly in major cities. Durability is desirable again. Scarcity regains status.

6 PHYGITAL JOURNEYS AND AI AGENTS

The purchase journey is now fully hybrid. More than 70% of consumers move between stores, e-commerce, and social platforms before buying, while nearly half prepare or extend in-store visits digitally. At the same time, personal AI agents are emerging. Invisible buyers that scan offers, compare prices, test delivery options, and act on behalf of consumers. For brands, visibility is no longer enough. Eligibility within algorithmic selection becomes critical.

7 TOWARD A CULTURE OF CONSCIOUS CHOICE

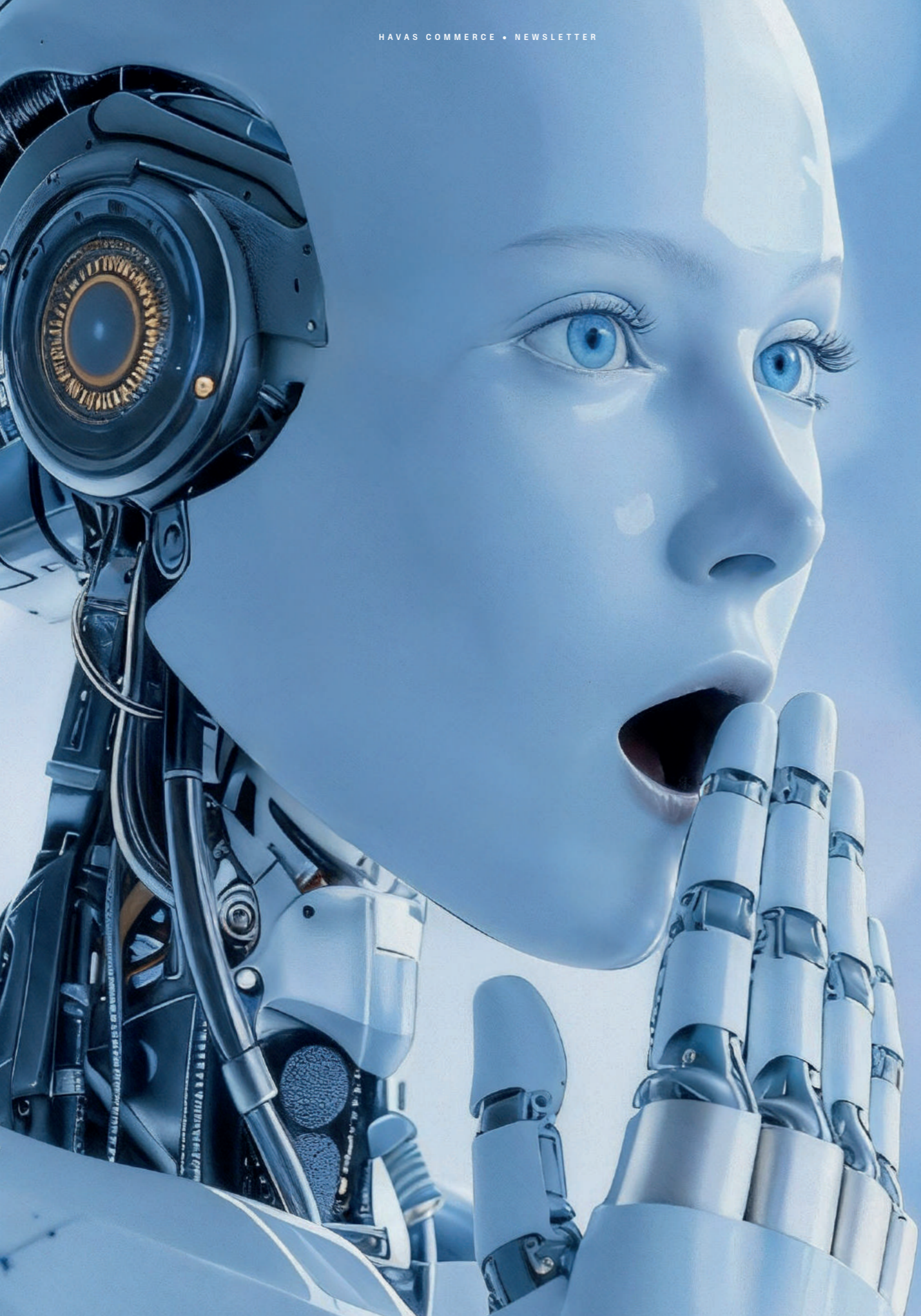
From scarcity to considered abundance, consumption has entered a phase of maturity. Consumers are informed, deliberate, and selective. The future of commerce will be neither about restraint nor excess, but about clarity, perceived value, and shared meaning three forces that now define modern consumption.

8 FROM PROMISES TO PROOF

Consumers now demand evidence, not declarations. Nearly 60% globally distrust green claims. Labels, traceability tools, carbon scores, and impact reporting have become decision triggers rather than optional extras. Greenwashing is increasingly penalized, with 58% of consumers saying they have already boycotted a brand they perceived as misleading.

COMMUNITIES OVER AUDIENCES

The consumer of 2026 is not a standalone target but a member of tribes seeking connection and recognition. More than half now belong to at least one experiential community or membership. Peer recommendations, micro-influencers, and private groups often carry more weight than brand messaging. The strongest brands no longer address segments. They build ecosystems of belonging.



2

CHAPTER

REFRAME
THE SYSTEM:
THE 6
FOUNDATIONAL
TRENDS
SHAPING RETAIL
FOR 2026



1 TREND

THE MOMENT RETAIL LEARNS TO THINK

The question of whether AI is here to stay has long been settled. The focus today is on how to fully leverage what AI makes possible. In retail, AI is transforming every aspect of the industry, from operations to customer experience. Automated warehouses, robotic pick-and-pack systems, and delivery robots streamline logistics, reduce errors, and ensure faster service, freeing human teams to focus on higher-value work while allowing retailers to scale with precision. At the same time, AI is redefining personalization. Visual and conversational technologies anticipate needs and deliver tailored recommendations, creating shopping journeys that feel unique. In stores, smart trolleys and mobile apps guide customers to products, suggest complementary items, and provide real-time information, while tools that analyze movement patterns or behavior further enhance the experience, making interactions seamless and relevant.

AI is also transforming how brands communicate and engage audiences. Automated content generation, dynamic visuals, and data-driven storytelling enable personalized campaigns at scale, reaching the right audience quickly and effectively. By combining operational efficiency, personalized experiences, intelligent in-store guidance, and AI-powered media creation, retailers are curating fully integrated and engaging experiences. AI is no longer optional. The opportunity now lies in pushing its potential to redefine engagement, efficiency, and creativity, shaping a retail landscape where consumer expectations are consistently exceeded.

ROBOTS: THE INVISIBLE HAND OF FULFILLMENT

DOORDASH LAUNCHES DELIVERY ROBOT DOT

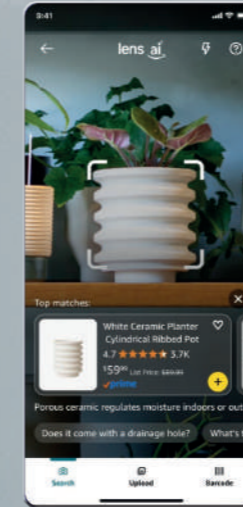


DoorDash has unveiled Dot, a compact, all-electric delivery robot capable of navigating roads, bike lanes, and sidewalks at speeds up to 20 mph. Developed by DoorDash Labs, Dot is one-tenth the size of a car and designed to handle everyday deliveries like groceries and household items efficiently. The robot is being rolled out in an early access program in Tempe and Mesa, Arizona, with plans for expansion to additional markets. DoorDash emphasizes that Dot is purpose-built for local deliveries, combining speed, reliability, and smart routing to improve the experience for both merchants and consumers.

Credit: Retail Detail BE - Source: <https://www.retailcustomerexperience.com/news/door-dash-launches-delivery-robot-dot/>

COGNITIVE PERSONALIZATION DEPTH • 1 •

AMAZON BEEFS UP LENS VISUAL SEARCH TOOL WITH AI, RUFUS



Amazon has introduced Lens Live, an upgraded visual search tool that scans items in real life, on websites or on social media in real time to show matching products on Amazon.com. Integrated with the AI shopping assistant Rufus, Lens Live provides product insights, summaries, and answers directly within the app. Available now to tens of millions of iOS users, Lens Live lets shoppers focus on specific items, add products to their cart, and save to wish lists without leaving the camera view, while Rufus enhances the experience with quick research and suggested questions.

Credit: Amazon - Source: <https://www.retailtouchpoints.com/topics/digital-commerce/amazon-beefs-up-lens-visual-search-tool-with-ai-rufus>

WALMART AGREEMENT WITH SYMBOTIC MARKS 'ONE OF THE MOST AMBITIOUS MOVES IN RETAIL AUTOMATION



Walmart is deepening its investment in automation through a partnership with Symbotic, acquiring the retailer's robotics business for \$200 million and funding a broader development program worth \$520 million. The initiative will use Symbotic's AI-enabled robotics platform to enhance operations at Walmart's pickup and delivery centres, turning stores into automated fulfillment hubs to accelerate online grocery profitability and reduce last-mile costs. The next-generation Symbotic platform, set to begin prototype installs in early 2026, promises higher storage density, faster installation, and support for both micro-fulfillment and distribution of perishables. Experts note that this approach leverages Walmart's physical footprint to compete with Amazon, Kroger, potentially setting a new global standard in retail automation.

Credit: Quartz - Source: <https://retailltechinnovationhub.com/home/2025/10/5/walmart-agreement-with-symbotic-marks-one-of-the-most-ambitious-moves-in-retail-automatio>

NOLI PARTNERS WITH AKENEO TO REVOLUTIONISE PERSONALISED BEAUTY EXPERIENCES



AI-driven beauty platform Noli, backed by L'Oréal, is using Akeneo's Product Information Management (PIM) system to power its hyper-personalized product recommendation engine. Leveraging a proprietary AI and BeautyDNA profiles, built from quizzes, expert insights, and advanced face scans, Noli curates tailored skincare and haircare routines from over 200,000 product combinations, removing guesswork from the beauty shopping experience. Akeneo's PIM provides a single source of structured, enriched, and accurate product data, ensuring every product attribute is correctly tagged for Noli's AI to deliver precise recommendations. Romain Fouache, CEO of Akeneo, highlights that this partnership ensures smarter, more personalized product selections, improving customer satisfaction and conversion while maintaining Noli's brand experience.

Credit: L'Oréal - Source: <https://fashionunited.uk/press/business/loreal-backed-ai-powered-beauty-tech-platform-noli-partners-with-akeneo-to-deliver-personalised-product-experiences-to-revolutionise-beauty-buying-journeys/2025101684451>

COGNITIVE PERSONALIZATION DEPTH • 2 •

WALMART TEAMS UP WITH OPENAI TO ALLOW PURCHASES DIRECTLY IN CHATGPT



Walmart has struck a deal with OpenAI to let shoppers make faster, more personalized purchases directly through ChatGPT. The move reflects changing consumer behavior, as shoppers increasingly turn to AI chatbots for gift ideas and deal-finding instead of traditional search bars.

CEO Doug McMillon described the AI shopping experience as “multi-media, personalized and contextual,” signaling a shift toward a more convenient and enjoyable eCommerce future. The timing of availability for Walmart purchases via ChatGPT has not yet been announced.

The announcement follows OpenAI’s Instant Checkout feature, which enables purchases through chatbots and is set to expand from Etsy sellers to more than one million Shopify merchants, including brands like Skims and Glossier. Walmart also continues to leverage AI internally with its app-based shopping assistant, Sparky.

Credit: New York Post - Source: <https://www.cnbc.com/2025/10/14/walmart-openai-chatgpt-shopping.html>

SPATIAL INTELLIGENCE DEVELOPMENT

NIKE INTRODUCES MOVEMENT-ANALYSIS TOOL TO LONDON STORE



Nike has launched Nike Sport Research Lab (NSRL) Form at its London Oxford Circus store, offering athletes a full-body running assessment. The service combines biomechanics expertise with marker-less motion capture technology, tracking 1.6 million data points across six running metrics to provide personalized insights and recommendations. Designed for athletes of all levels and sports, NSRL Form helps users understand their body and optimize movement. The Oxford Circus location is one of the first worldwide to feature this service, alongside Nike’s three-floor temporary flagship store near NikeTown London.

Credit: Retail Gazette - Source: <https://www.retailcustomerexperience.com/news/doors-dash-launches-delivery-robot-dot/>

ALIBABA LAUNCHES AI CHATBOT SERVICE TO BROADEN CONSUMER APPEAL



Alibaba has launched a new AI chatbot assistant integrated into its Quark app, marking a renewed push into the consumer AI market dominated by ByteDance and Tencent. Originally a browser, Quark has been repositioned as Alibaba’s main consumer platform, now offering AI-powered search and chat functions.

The free chatbot supports text and voice interactions, delivering real-time information and services. While Alibaba’s AI efforts have traditionally targeted enterprise clients via its cloud division, this move aims to strengthen its weak consumer presence — its earlier AI app, Tongyi, had only 6.96 million monthly users in September, far behind rivals like Doubao (150M) and DeepSeek (73.4M). The new Quark assistant runs on Alibaba’s Qwen3 models, offering improved reasoning and understanding.

Credit: Euronews.com - Source: <https://insideretail.asia/2025/10/23/alibaba-launches-ai-chatbot-service-to-broaden-consumer-appeal>

WAITROSE TESTS AI ON SHOPPING TROLLEYS



Waitrose is trialing AI-powered smart trolleys at its Bracknell store, using computer vision to track products as customers shop. Unlike traditional checkout data, the trolleys provide real-time insights into customer behavior, product interactions, and inventory movement. This technology helps retailers optimize store layouts, improve demand forecasting, and enhance overall shopping experiences, while also demonstrating the broader potential of AI in transforming in-store operations.

Credit: Retail Gazette - Source: <https://www.traxtech.com/ai-in-supply-chain/waitroses-ai-shopping-trolleys-signal-a-retail-revolution-for-supply-chain-intelligence>

GENERATIVE STORYTELLING ALGORITHMS

H&M USHERS IN FASHION'S AI FUTURE WITH DIGITAL MODEL TWINS



Global fashion giant H&M has launched its first retail marketing campaign using hyper-realistic AI-generated avatars of real models, in partnership with Swedish tech company Uncut. The campaign, which features digital models set against stylized fashion capital backdrops, also includes a behind-the-scenes documentary to promote transparency and inclusion. Aimed at enhancing creativity without replacing people, H&M emphasizes that models retain ownership of their digital likeness, governed by standard commercial terms. The initiative, starting with seasonal denim, will expand to more cities, collections, and H&M brands, positioning the company as a pioneer in ethically integrating generative AI into fashion marketing

Credit: French Web - Source: <https://www.indiaretailing.com/2025/07/02/hm-digital-model-twins/>

TESCO LETS BRANDS CREATE THEIR OWN RETAIL MEDIA ADS USING AI



Tesco has introduced Creative Studio, a generative AI tool on its retail media platform that allows brands to create their own ads quickly and at scale. By uploading images, text, and brand guidelines, partners can automatically generate all ad formats approved for Tesco Media's channels, reducing production time while maintaining quality and accuracy. The move comes as Tesco notes that over 60% of shoppers are open to discovering new products while shopping, highlighting the growing potential of retail media.

Credit: Eagle Eye - Source: <https://www.retaildetail.eu/news/food/tesco-lets-brands-create-their-own-retail-media-ads-using-ai/>



2 TREND

RETAIL BREAKS OUT OF RETAIL

Retail is evolving beyond products into experiences, diversifying its approach to captivate consumers in new ways. One of the most notable areas of diversification is gastronomy. Retail brands are exploring the culinary world, opening gourmet cafés, collaborating with celebrated chefs, and designing immersive dining experiences. By combining food and lifestyle, brands transform everyday consumption into memorable, shareable moments that strengthen emotional connections with their audience. This approach not only broadens the consumer experience but also diversifies revenue streams, allowing retailers to thrive in an increasingly competitive and experience-driven market.

The diversification trend extends further into tourism, where brands are creating aspirational, immersive experiences. From branded hotels to exclusive travel packages, retailers are moving beyond traditional commerce to become lifestyle curators. By doing so, retailers are redefining the meaning of engagement. They are no longer just places to shop, but they become destinations where lifestyle, culture and experience intersect.

THE TASTE OF BRAND ELEVATION

JOHN LEWIS OPENS JAMIE OLIVER COOKERY SCHOOL AND CAFE



John Lewis has opened a Jamie Oliver cooking school and café in its Oxford Street flagship store. The new area covers over 4,600 square feet (approx. 427 m²) on the third floor. It includes two classrooms for the cooking school and a 50-seat Jamie Oliver café. This initiative meets a growing demand from customers wishing to combine shopping, dining and drinking. Sales in the hospitality sector (cafés, restaurants, etc.) have increased by 6% at John Lewis over the past year. One in five customers making a transaction in one of the stores now does so in a café or restaurant.

The brand's own "Place to Eat" restaurants welcomed 750,000 more customers than in 2024. Due to this success, and the perceived importance of these offerings to the customer experience, John Lewis plans to open five more cafés and restaurants in its stores this year.

Credit: Retail Gazette - Source: <https://www.retailgazette.co.uk/blog/2025/05/john-lewis-cafes/>

FROM CHECKOUT TO CHECK-IN

ZARA LAUNCHES INTO TOURISM WITH ITS "TRAVEL MODE"



Zara launches a new feature called Travel Mode in its mobile app, designed to accompany travelers. Enabled by geolocation, it offers tourist guides for several major cities (London, Milan, Tokyo, etc.) with local recommendations (restaurants, museums, attractions). Users can also view and purchase Zara items that are appropriate for the country they visit, with payment in local currency. The orders are centralized in a dedicated tab. The mode works even offline, allows you to locate nearby Zara stores and send digital postcards.

This initiative combines fashion and tourism, offering a personalized and integrated experience. Zara thus positions itself as a travel companion, inserting itself into the customer journey from the moment of planning and transforming its application into a multifunctional platform combining services, information and commerce.

Credit: Mister Travel - Source: <https://mistertravel.news/2025/05/25/zara-se-lance-dans-le-tourisme-avec-son-travel-mode/>

LIDL IS OPENING ITS FIRST PUB IN IRELAND



Lidl will open its first pub in Northern Ireland, in Dundonald, near Belfast. The initiative was approved by the High Court after a legal battle. The pub, located in the store, will accommodate around 45 customers and offer draught and bottled beers, wine, cider and spirits.

This is a first for Lidl, which is innovating by combining supermarket and pub. This strategy could strengthen customer loyalty by transforming the supermarket into a community destination.

Credit: BFM RMC Conso - Source: <https://rnc.bfmtv.com/conso/alimentation/>

IKEA HAS OPENED ITS FIRST HOTEL IN SPAIN, IN LAS PALMAS DE GRAN CANARIA



IKEA has opened its first-ever hotel in Spain, located in Las Palmas de Gran Canaria, called Las Dunas de Santa Catalina Boutique House. Unlike what you'd expect from the brand, there's no visible IKEA logo, no flat-pack furniture, and no catalogues in sight. Managed by its local subsidiary Sarton Canarias, the 20-room boutique hotel features a minimalist, locally-inspired Mediterranean design with light wood, natural textiles, soft lighting, and artisanal decor. Rooms include a desk, minibar, coffee machine, flat-screen TV, safe, and private bathroom, with some offering city-view balconies. Nightly rates start at €125.

This hotel marks a strategic shift for IKEA as it experiments with a branding-free hospitality model focusing on experience and accessible design rather than brand identity. A second hotel, Las Vegas de Ciudad Jardín Suites, is already in the works in Las Palmas, featuring two renovated villas and 21 rooms in the same discreet and elegant style.

Credit: La Réclame - Source: <https://lareclame.fr/ikea-hotel-espagne-canari-design-316624>



3 TREND

RETAIL BECOMES A PERSONAL UPGRADE SYSTEM

The boundaries between retail, health, and lifestyle are blurring, creating a new frontier where shopping meets self-care. As consumers increasingly prioritize well-being over mere consumption, retailers are expanding their role from sellers of products to curators of holistic experiences that nurture both body and mind.

A major trend is putting nutrition front and centre. Retailers are launching digital tools and apps that help customers track their diet, discover functional foods, and make more responsible, informed choices. By integrating technology with product offerings, brands are turning everyday shopping into a proactive wellness experience. Complemented by responsible communication strategies, these initiatives guide consumers toward choices that are both sustainable and health-conscious.

At the same time, retailers are caring for beauty and health, inside and out, extending their role beyond products to services that support holistic well-being. On-demand pharmacy services, from vaccination appointments to prescription deliveries, are now accessible directly through store platforms or apps, making health care more convenient and approachable. Through these innovations, retail spaces are transforming into trusted partners in wellness.

By combining digital tools, personalized services, and thoughtful communication, retailers are shaping a landscape where nutrition, beauty, and health converge which makes self-care more accessible and deeply integrated into everyday life.

THE FUNCTIONAL FOOD FOOTPRINT

KROGER LAUNCHES VIRTUAL NUTRITION COACHING PROGRAM FOR LOYALTY MEMBERS

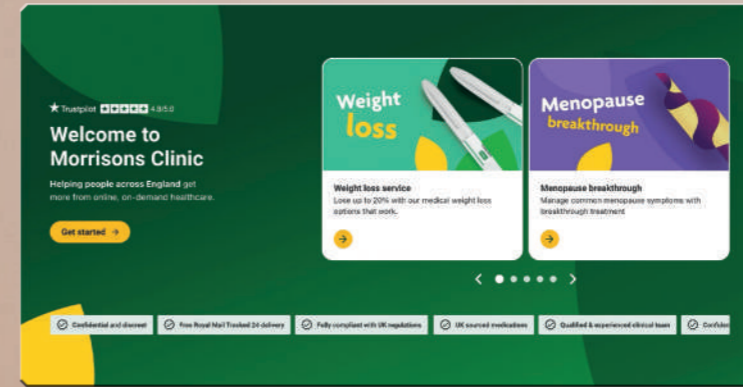


Kroger, the American mass retailer, is setting itself apart by integrating a health division, Kroger Health, which relies on digital technology to help its customers achieve wellness. With the free “OptUP Your Nutrition” program, customers benefit from personalized nutritional advice via virtual sessions with dietitians. These experts guide them through tools such as the Bitewell FoodHealth Score and MyNutrition Insights to optimize their food choices. This approach illustrates a growing trend in retail: the integration of personalized health services to build customer loyalty and position the company as a key player in wellness. At the same time, the Kroger Health Savings Club (KHSC) facilitates access to medication, reinforcing Kroger’s commitment to its customers’ health.

Credit: Chaine Store Age - Source: <https://chainstoreage.com/kroger-launches-virtual-nutrition-coaching-program-loyalty-members>

THE INTEGRATED SELF-CARE MATRIX • 1 •

MORRISONS LAUNCHES ONLINE ON-DEMAND PHARMACY SERVICE



Morrisons has introduced a new online on-demand pharmacy service, providing customers with quick and convenient access to medications and health products. Available through its website and app, the service allows users to order prescriptions and over-the-counter items for home delivery or in-store collection.

Credit: Demotivateur - Source: <https://www.retailgazette.co.uk/blog/2025/01/morrisons-launches-new-online-on-demand-pharmacy-service/>

WALMART AND SODA HEALTH TEAM ON AI POWERED PERSONALISED NUTRITION AND WELLNESS INSIGHTS

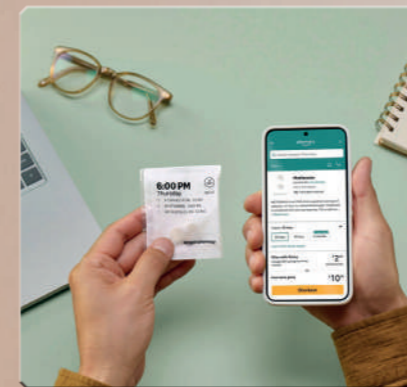


Walmart launched the Everyday Health Signals program in partnership with Soda Health to provide personalized nutrition and wellness guidance to select Medicare Advantage and Medicaid members. Using artificial intelligence and retail purchase data, the program offers tailored health insights, including healthy recipes, shopping lists, and recommendations aligned with individual wellness goals.

Members enrolled in participating flex card programs receive data-driven advice based on their shopping habits. The initiative also supports healthcare plans in improving care coordination. The goal is to make healthy eating more accessible and demonstrate how retail and healthcare can work together to improve public health.

Credit: Retail Technology Innovation Hub - Source: <https://retailtechannovationhub.com/home/2025/6/17/walmart-and-soda-health-team-on-ai-powered-personalised-nutrition-and-wellness-insights>

AMAZON EXPANDS PILLPACK PRE-SORTED MED SERVICE TO MEDICARE RECIPIENTS



Amazon is expanding its Amazon Pharmacy services with two major updates aimed at simplifying medication management. First, its PillPack service acquired in 2018 will now be available to over 50 million Medicare Part D beneficiaries. PillPack delivers monthly shipments of pre-sorted medication packets labeled with the date and time of intake, making it easier for individuals with multiple prescriptions to stay on track.

Second, Amazon has introduced a new caregiver feature that allows customers to securely invite trusted individuals to manage prescriptions on their behalf through their own Amazon accounts. This gives caregivers greater flexibility and peace of mind, ensuring medications are ordered and delivered on time. These updates reflect Amazon’s commitment to making pharmacy services more accessible, convenient, and supportive for both patients and their loved ones.

Credit: Chain Store Age - Source: <https://chainstoreage.com/amazon-expands-pillpack-pre-sorted-med-service-medicare-recipient>

THE INTEGRATED SELF-CARE MATRIX • 2 •

AMAZON OPENS ITS FIRST HEALTH AND BEAUTY STORE IN MILAN: A STEP CLOSER TO PHYSICAL COMMERCE



Amazon has inaugurated its first physical health and beauty store, Amazon Parafarmacia & Beauty, in Milan. The store offers beauty products, personal care products and non-prescription medicines, seeking to translate its online success into physical commerce. The store offers “Derma-bars” for digital skin analysis, product recommendations, as well as on-site pharmacists for over-the counter medications. This initiative marks a new experiment by Amazon in physical commerce, following the closure of other types of stores.

Credit: Premium Beauty News - Source: <https://www.cnbc.com/2025/02/11/amazon-opens-its-first-beauty-and-personal-care-store-in-italy.html>

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WALMART TO OPEN ‘BEAUTY BARS’ IN SELECT STORES



Walmart is stepping up its presence in the beauty sector by launching “Beauty Bars” in a selection of 40 stores, allowing customers to discover products, consult experts and test samples. This initiative coincides with its annual “The Beauty Event”, offering major online and in-store promotions on a wide range of beauty products. At the same time, Walmart is highlighting trendy brands online and has enriched its assortment with new premium brands. These efforts are part of a wider sales strategy, including recurring promotional events such as “Walmart Savings Week” and “Walmart+ Week” for its subscribers.

Credit: CSA - Source: <https://chainstoreage.com/walmart-open-beauty-bars-select-stores>

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4 TREND

IMPACT MOVES FROM MORAL CHOICE TO MARKET POWER

As consumers grow increasingly conscious of the environmental and social impact of their purchases, retailers are reimagining what responsibility means in the modern marketplace. The new wave of responsible retail goes far beyond sustainability claims — it's about embedding ethics, inclusivity, and circularity into every stage of the shopping experience.

More brands are now on a mission to reduce food waste, reimagining their operations to make sustainability feel effortless and impactful. Smart inventory systems, dynamic pricing, and collaborations with food-rescue initiatives are helping turn potential waste into opportunity. What was once a challenge has become a new expression of creativity and care.

At the same time, prolonging product life cycles has become a cornerstone of responsible retail. Through repair, resale, and return services, brands are building ecosystems that keep products in circulation and stories alive. Whether it's a pre-loved fashion piece given a second chapter or an appliance repaired instead of replaced, this shift celebrates longevity over disposability and meaning over novelty.

Responsibility also extends to people. By creating inclusive retail spaces, brands are broadening their idea of who retail is for. Stores are becoming more accessible and are designed to foster a sense of belonging making inclusivity a part of the experience.

In this ever-evolving landscape, responsibility feels less like a corporate checkbox and more like a shared culture of awareness and intention. Reducing waste, extending product life, and designing for inclusion are no longer separate goals, but the foundation of a more conscious retail world, one that connects commerce with care.

RESOURCE TIRAGE ARCHITECTURE

ALDI GIVES SHOPPERS THE CHANCE TO WIN A YEAR'S SUPPLY OF TOO GOOD TO GO SURPRISE BAGS



Aldi and Too Good To Go are teaming up for Action Week against Food Waste (March 17-23, 2025). Customers can win a year's supply of Too Good To Go "Surprise Bags" by sending their best anti-waste tip by e-mail.

To mark the event, they are collaborating with Lagomchef, who is showing how to cook meals from the contents of Aldi Surprise Bags, which sell for £3.30. Surprise Bags contain at least £10 worth of products close to their sell-by date. Customers can reserve them via the Too Good To Go app.

Credit: Retail Times - Source: <https://retailtimes.co.uk/aldi-gives-shoppers-the-chance-to-win>

THE ABUNDANCE RECLAMATION PROJECT • 1 •

JOHN LEWIS ROLLS OUT IN-STORE REPAIR SERVICE NATIONWIDE



French refurbished tech company Back Market, valued at €5.1 billion and active online in 17 countries, is opening its first U.S. store in New York and plans to launch around 500 of partner stores in France. Alongside this, the company introduces a repair service for devices like smartphones, tablets, consoles, and cameras, available to all consumers via one-time fees or a €6.99/month subscription for unlimited repairs.

The move reflects Back Market's strategy to combine online presence with in-person experiences, making refurbished tech more accessible and reliable for customers.

Credit: Retail Gazette - Source: <https://www.retailgazette.co.uk/blog/2025/04/john-lewis-repair-service/>

ALDI LAUNCHES IN-STORE REDUCTION ZONES TO TACKLE FOOD WASTE



Aldi is launching special discount sections in its UK stores to make it easier for customers to find marked-down fresh food and to cut food waste. These new zones will highlight bread, fruit, vegetables, and other short-dated items offered at lower prices throughout the day.

The initiative aligns with Aldi's effort to keep groceries affordable while promoting sustainability. Luke Emery, the retailer's sustainability director, said the move will help shoppers save money and reduce waste by drawing attention to quality food that might otherwise be discarded.

Aldi is also expanding its waste-reduction efforts through daily food donations with Neighbourly and its partnership with Too Good To Go, which sells low-cost bags of unsold items.

Credit: The Grocer - Source: <https://www.retailtouchpoints.com/topics/digital-commerce/amazon-beefs-up-lens-visual-search-tool-with-ai-rufus>

REFURBISHED SPECIALIST BACK MARKET OPENS STORES IN FRANCE AND NYC AND LAUNCHES REPAIR SERVICE



French refurbished tech company Back Market, valued at €5.1 billion and active online in 17 countries, is opening its first U.S. store in New York and plans to launch around 500 of partner stores in France. Alongside this, the company introduces a repair service for devices like smartphones, tablets, consoles, and cameras, available to all consumers via one-time fees or a €6.99/month subscription for unlimited repairs.

The move reflects Back Market's strategy to combine online presence with in-person experiences, making refurbished tech more accessible and reliable for customers.

Credit: Shutterstock.com - Source: <https://www.ecommercemag.fr/Thematique/retail-1220/veille-tribune-2169/Breves/back-market-ouvre-premiers-magasins-physiques-france-new-485243.htm>

THE ABUNDANCE RECLAMATION PROJECT • 2 •

HOUSE OF VINTED: LONDON'S FIRST SECOND-HAND LUXURY FASHION POP-UP



On March 22, 2025, Vinted launched its first luxury second-hand fashion pop-up in London, called "House of Vinted". This exclusive event, reserved for Vinted members, was held at The Adria hotel, located in South Kensington. The pop-up was divided into several themed rooms and featured several brands on display such as Prada, Gucci, Maison Margiela, Jacquemus and more. In addition to the fashion presentation, the event offered personalization workshops, such as leather embossing, and professional styling advice. Visitors could also relax at the Vinted café. The pieces presented at the pop-up will be available for purchase on the Vinted website from March 25, 2025, with part of the proceeds donated to Oxfam.

Credit: Retail Gazette - Source: <https://www.retailgazette.co.uk/blog/2025/03/vinted-london/>

EMPATHETIC SPATIAL MANAGEMENT

MORRISONS IMPROVES CAFÉ ACCESSIBILITY WITH BRAILLE MENUS



Morrisons is increasing the accessibility of its UK cafés by introducing Braille menus. The initiative follows careful listening to visually impaired customers, for whom ordering in a café can be a challenge. According to Sean Gill, Director of Morrisons cafés, the move aims to make the experience more inclusive. At the same time, Morrisons has enhanced its range of dishes and promotions.

Credit: Retail Gazette - Source: <https://www.retailgazette.co.uk/blog/2025/02/morrisons-cafe-updates/>

RIMOWA TRANSFORMS BUMPS AND SCRATCHES INTO BEAUTY WITH THEIR RE-CRAFTED COLLECTION



The German luxury brand Rimowa launches a collection of used suitcases, featuring signs of wear such as bumps and scratches. Unlike other brands that refurbish second-hand items, Rimowa values these imperfections, considering them as marks of a lived experience. This initiative, named Re-Crafted, follows a surprisingly strong demand for these vintage suitcases, which sold quickly in previous launches. By encouraging sustainability and celebrating the history of each suitcase, Rimowa stands out from the fast fashion approach that is driven by constant novelty. The company plans to continue these second-hand suitcase launches, recognizing consumers' attraction for items with a history.

Credit: Rimowa - Source: <https://www.fastcompany.com/91303788/rimowa-is-selling-old-beat-up>

TESCO ADDS ACCESSIBILITY MODES TO HELP VISUALLY IMPAIRED CUSTOMERS ON SELF-SERVICE CHECKOUTS



Tesco has introduced new accessibility modes on self-service checkouts in the UK and ROI, enabling visually impaired shoppers to adjust high-contrast settings and text for a more inclusive experience. Sarah Quiggin, Head of Product, called it an important step forward in making incremental, transformational improvements with Tesco's new till platform. The retailer also continues to expand its AI and automation capabilities, optimizing logistics to reduce around 100,000 miles per week for deliveries. Tesco reported strong first-half results, with sales up 5.1% to £33.1 billion and underlying operating profit up 1.6% to £1.7 billion, prompting an upward revision of full-year guidance.

Credit: Hargreaves Lansdown - Source: <https://retailtechtinnovationhub.com/home/2025/10/12/tesco-adds-accessibility-modes-to-help-visually-impaired-customers-on-self-service-checkouts>



5 TREND

RE-CALIBRATING DESIRE METRICS

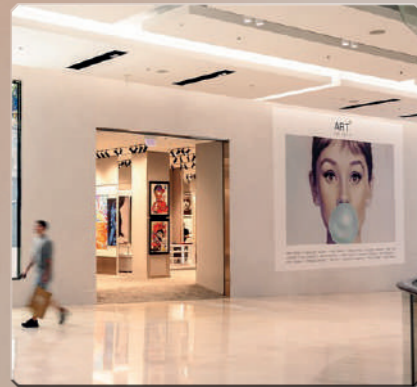
Retailers are increasingly rethinking their strategies to appeal to both aspirational and value-driven consumers by introducing new layers of product and experience differentiation. The premiumization of retail spaces is at the core of this shift, as brands transform stores into immersive environments that elevate the shopping experience beyond simple transactions. From curated design elements to exclusive in-store services and limited-edition drops, retail spaces are becoming lifestyle destinations that communicate status, craftsmanship, and emotional connection. This strategy caters especially to Gen Z and Millennials, who view shopping as an extension of identity and seek experiences that feel personalized and worth sharing.

At the same time, retailers are leveraging value through tiered products and private labels to balance accessibility with aspiration. By offering multi-tiered product lines — from entry-level essentials to premium collections — brands can attract diverse customer segments without diluting their core identity. Private labels, in particular, allow retailers to maintain control over pricing and quality while experimenting with innovation and exclusivity. This approach creates a sense of inclusivity for budget-conscious shoppers while maintaining a premium halo that sustains brand desirability.

Ultimately, the combination of premiumized spaces and tiered product strategies signals a broader redefinition of what “value” means in modern retail. It’s no longer just about price — it’s about experience, meaning and identity.

THE SENSORY SCARCITY ECONOMY

HOW PLACING ART IN MALLS IS SHIFTING LUXURY'S POWER FROM STORES TO SYMBOLS



Art+ has launched a pop-up gallery inside Westfield Bondi in Sydney, Australia, positioning fine art alongside luxury retailers like Chanel and Dior. Today, malls are reimagining themselves as cultural destinations rather than just shopping hubs. For Westfield, the partnership elevates its premium identity by surprising customers with an unexpected cultural layer, while also turning retail space into a marketing tool beyond traditional sales. For Art+, the Bondi pop-up offers access to high-value shoppers who may not visit a traditional gallery, framing art as part of the same luxury ecosystem as fashion and jewelry. The move boosts visibility, broadens the customer base, and tests the commercial potential of integrating fine art into mainstream retail. If successful, it could pave the way for further rollouts in Australia and globally, positioning Westfield as a leader in the retail-culture crossover.

Credit: Retail Times - Source: <https://insideretail.asia/2025/09/18/how-placing-art-in-malls-is-shifting-luxurys-power-from-stores-to-symbols/>

TIERED ASPIRATION MANAGEMENT

H&M TRIALS PREMIUM CHILDREN'S FASHION AT GALERIES LAFAYETTE



H&M has opened its very first shop-in-shop in the prestigious Parisian department store Galeries Lafayette Haussmann. This new outlet is dedicated to its premium children's fashion line, called "H&M Adorables". Launched last year, H&M Adorables is a high-quality collection for babies and toddlers, focusing on timeless designs and more sustainable materials such as wool, organic cotton and cashmere, designed to be passed from one child to the next. The space is divided into two distinct zones: one for babies and newborns, and another for children up to 8 years of age, with the checkout and fitting rooms located between the two sections. This roll-out in France follows a successful test at London's Selfridges department store last October.

Credit: Retail Detail EU - Source: <https://www.retaildetail.eu/news/fashion/in-beeld-hm-test-premium-kindermode-in-galeries-lafayette/>

H&M LAUNCHES CONCEPT STORE IN PARIS TO STRENGTHEN ITS PREMIUM POSITIONING



After a temporary pop-up in 2024, H&M opened a permanent 1,000 m² concept store in Paris's Marais district on September 4, 2025. The store reflects H&M's push toward a more premium positioning, aiming to attract a discerning clientele and compete with brands like Zara. Spread over three levels, the store offers curated collections for women and men, lingerie, accessories, beauty, and exclusive capsules such as H&M Studio, H&M Atelier for men, and a collaboration with Belgian designer Glenn Martens. It also features France's only Pre-Loved corner for second-hand items. The interior design is minimalist with natural tones, and the courtyard hosts cultural events and innovative RFID self-checkout systems are introduced for the first time by H&M in France. After all, the Marais store reinforces H&M's Paris presence with seven locations, nearly 60 staff, and a strategic focus on premium retail, following closures of some former flagship stores and ongoing modernizations of others.

Credit: Points de Vente - Source: <https://www.ecommercemag.fr/Thematique/retail-1220/veille-tribune-2169/Breves/concept-store-incarner-strategie-haut-gamme-h-m-484959.htm>

ALBERTSONS SEEKS TO DRIVE UP PRIVATE LABEL PENETRATION TO 30%



Albertsons is ramping up investment in its owned brands to strengthen customer loyalty and ease the impact of inflation. The retailer aims to boost private label penetration from 25% to 30%, positioning it as a key growth driver and competitive advantage. The move aligns with similar initiatives from Target, Walmart, and Amazon, all expanding their private label offerings to deliver affordable quality. Following a solid Q2, with revenue up 2% to \$18.9B, digital sales rising 23%, and loyalty memberships up 13%, Albertsons is betting that owned brands will fuel both customer value and long-term profitability.

Credit: CoStar - Source: <https://www.retailtouchpoints.com/features/news-briefs/albertsons-seeks-to-drive-up-private-label-penetration-to-32>



6 TREND

CULTURE CONVERTS AT THE SPEED OF SCROLL

Retailers are increasingly adapting to Gen Z's fast-changing digital behaviour by translating social and cultural trends into tangible sales strategies. Gen Z's shopping journey is defined by instant gratification and social media discovery, with platforms like TikTok, Instagram, and YouTube becoming digital storefronts where content and commerce merge seamlessly. Shoppable ads allow users to purchase directly from posts or videos without leaving the app, turning inspiration into conversion in seconds. Retailers are leveraging data-driven targeting and creator partnerships to make these ads feel authentic, interactive, and personalized, which drives higher engagement and purchase intent.

At the same time, brands are infusing gamification across both digital and physical retail touchpoints to maintain loyalty in an attention-driven economy. Reward-based challenges, digital collectibles, and interactive experiences such as AR try-ons or store-based quests keep Gen Z engaged while connecting online and offline channels. This strategy not only boosts participation and repeat visits but also transforms shopping into entertainment — an expectation for a generation raised on interactive media.

In short, today's most innovative retailers aren't just selling products, but they're building ecosystems that blend commerce, play, and community, perfectly tailored to Gen Z's lifestyle and mindset.

ZERO-CLICK CONVERSION

CARREFOUR OPENS A STORE ON TIKTOK SHOP



Carrefour has launched its own TikTok Shop in France, becoming the “first chain in the sector” to do so in the country. According to Alexandre de Palmas, CEO of Carrefour France, the initiative aims to respond to a new trend of buying products directly on social networks, where Carrefour already enjoys a significant audience.

Carrefour’s online store on TikTok will initially offer a selection of non-food products, such as cameras, beauty accessories, home collections and kitchenware.

Credit: FSR Food Retail & Service - Source: <https://www.foodretail.es/retailers/carrefour-estrena-tienda-en-tiktok-shop.html>

ATTENTION-PLAY CURRENCY • 1 •

EPAM SYSTEMS AND BOSS LAUNCH IMMERSIVE MOTORSPORT EXPERIENCE POWERED BY APPLE PRO VISION



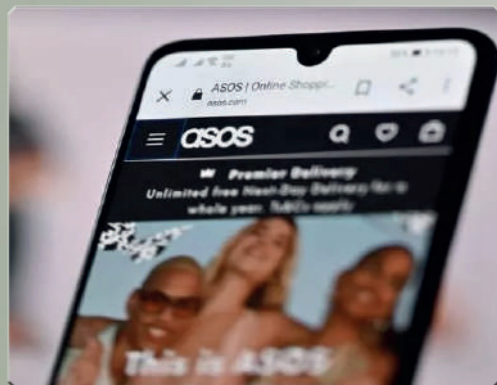
BOSS has teamed up with EPAM Systems to launch a cutting-edge immersive motorsport experience using Apple Vision Pro, designed to give fans a front-row experience of Formula 1.

The activation, opening ahead of the 2025 Singapore Grand Prix, is set up in select BOSS stores in seven global cities including London, Paris, Barcelona and Las Vegas. Visitors can step trackside, sit in the cockpit, and experience the intensity of racing, all through a spatial computing platform that merges luxury fashion, high-speed sport, and technology.

The collaboration aims to redefine fan engagement, offering a mix of storytelling, adrenaline, and interactivity. By integrating the Aston Martin Aramco F1 Team into the experience, BOSS and EPAM are transforming traditional retail spaces into experiential destinations, connecting audiences to the brand in entirely new ways.

Credit: EPAM - Source: <https://retailtechnnovationhub.com/home/2025/10/2/epam-systems-and-boss-launch-immersive-motorsport-experience-powered-by-apple-pro-vision>

ASOS ROLLS OUT 'NEW ERA' OF VIDEO SHOPPING



Asos has introduced Asos Live, a new interactive video shopping feature that merges entertainment and ecommerce. The platform lets users watch creator-led videos — live or on demand — while shopping directly through the app. By offering styling advice, beauty tutorials, and trend insights, Asos aims to replicate the social media fashion experience within its own ecosystem.

Since launching in August, Asos Live has drawn hundreds of thousands of views, mostly on replay, and driven higher engagement and conversion rates. The initiative supports the company’s broader goal of making shopping more inspiring and personal, as it continues to recover profitability and advance its business transformation despite lower overall sales.

Credit: Birmingham Mail - Source: <https://www.retailgazette.co.uk/blog/2025/10/asos-video-shopping/>

BONDI SANDS ADDS GAMIFICATION TO IMMERSIVE EXPERIENCE



Napster has partnered with Bondi Sands to launch an immersive virtual experience targeting Gen Z, accessible via web and Apple Vision Pro. Users explore a digital Bondi Beach, interacting with the environment, earning loyalty rewards and playing a surfing game that teaches sun safety, all while collecting virtual sunscreen and avoiding obstacles.

The experience also features a Beachfront pop-up, where clickable icons deliver tips on Aussie beach culture and SPF awareness. Web users can integrate the game with Club Bondi, the brand’s loyalty program, to earn points and unlock rewards. Kym Bonollo, Bondi Sands Senior Director of Brand & Marketing, emphasizes the initiative’s dual goal: entertain while educating. Napster CEO Sam Huber notes the strategy leverages Gen Z’s affinity for gaming, combining interactive storytelling, gamification, and immersive tech to deepen engagement and brand loyalty.

Credit: Infinite Reality - Source: <https://retailtechnnovationhub.com/home/2025/10/2/retail-technology-innovation-of-the-week-gen-z-focused-bondi-sands-adds-gamification-to-immersive-experience>

ATTENTION-PLAY CURRENCY • 2 •

NEWS
LIVE

HAVAS
Commerce

JULY
5

WALMART UNLIMITED GAMIFIED MINI-SERIES: THE FUTURE OF IMMERSIVE COMMERCE



Walmart is becoming a major player in immersive commerce, blending virtual reality, 3D visuals, and gamification to engage the next generation of shoppers. Its standout initiative, the gamified mini-series Walmart Unlimited built with Unity, Spatial, and creative partners drew over 1.2 million players with a shoppable, cross-platform storyline. Beyond the series, Walmart has expanded into the metaverse through Zepeto, the launch of Walmart Realm on Emperia with influencer-curated virtual shops, and real-world commerce on Roblox via interactive experiences and a UGC-powered IRL store. These efforts reflect Walmart's strategy to merge entertainment, technology, and retail into engaging digital spaces.

Credit: Retail Technology Innovation Hub - Source: <https://retailtechinovationhub.com/home/2025/2/25/walmart-unlimited-gamified-mini-series-set-to-go-live-this-week-on-spatial-immersive-platform>

NEWS
LIVE

HAVAS
Commerce

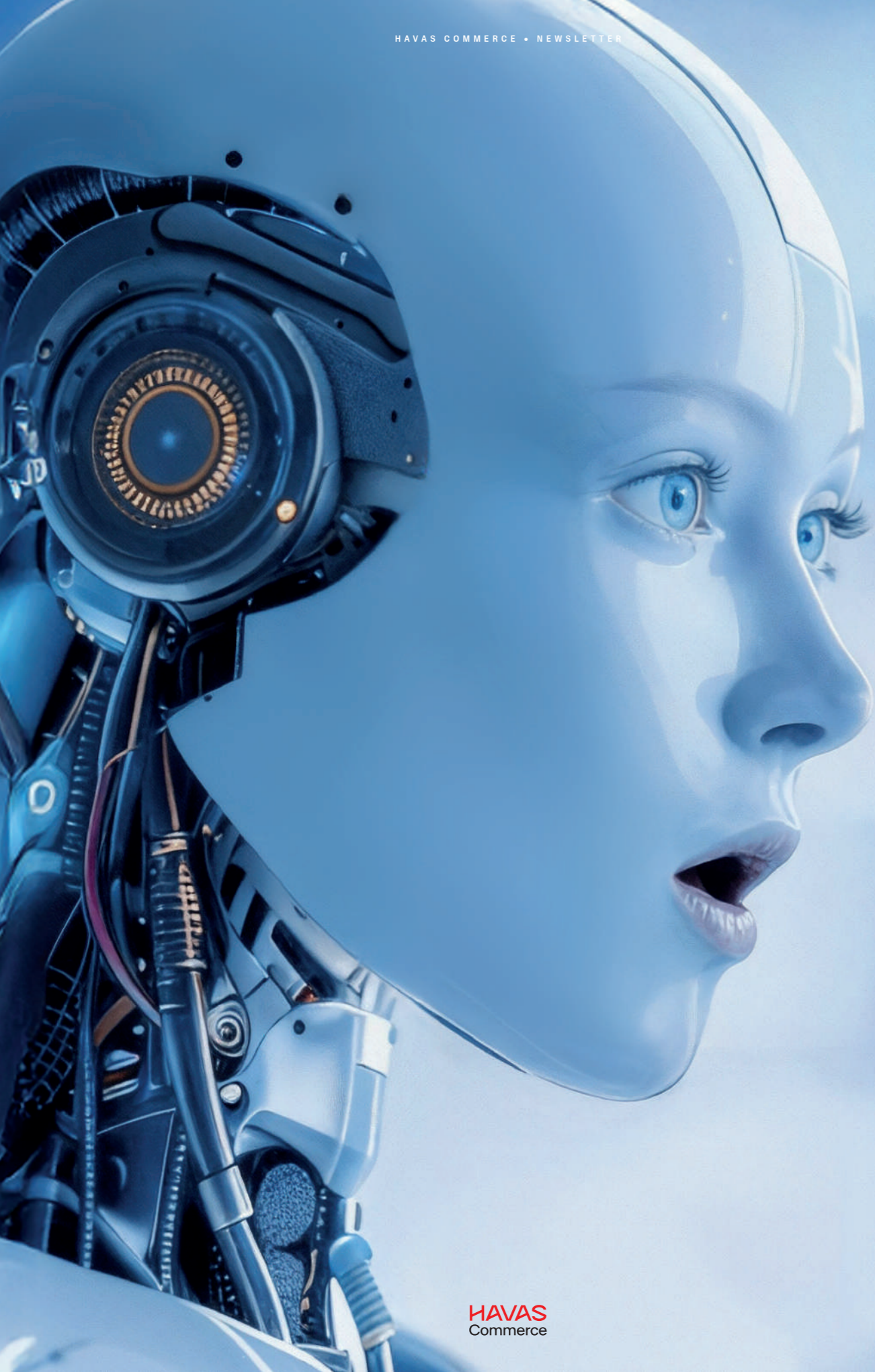
OCT
5

REEBOK TEAMS WITH PLAYSTATION ON LIMITED-EDITION SNEAKER DROP



Reebok has partnered with Sony Interactive Entertainment on a limited-edition sneaker line celebrating PlayStation's 30th anniversary. The Reebok x PlayStation collection features the InstaPump Fury 94, Pump Omni Zone II, and Workout Plus, each representing the console's original launch regions — Japan, the US, and the UK. Inspired by the first PlayStation, the sneakers blend retro grey tones, vintage logos, and console-inspired details. The designs include nods to each region's launch date and signature PlayStation motifs. Reebok's global senior product marketing manager, Mubi Ali, described the collaboration as a nostalgic "time machine" capturing the spirit of mid-'90s youth culture. The limited-edition collection drops later this month through select retailers.

Credit: GQ Magazine France - Source: <https://insideretail.asia/2025/10/02/reebok-teams-with-playstation-on-limited-edition-sneaker-drop/>



3

CHAPTER

THE MOST
SIGNIFICANT
RETAIL ADS
OF THE YEAR

THE MOST SIGNIFICANT RETAIL ADS OF THE YEAR

If the previous chapters map where retail is heading, the ads in this section show how it chooses to talk about it. Retail advertising has become the place where structural tensions are compressed into a few seconds of story: anxiety and agency, price and proof, stress and self-care. These campaigns are not just “good creatives”; they are public prototypes of the new contracts retailers are trying to build with consumers.

Each month, our “Follow the World of Commerce” newsletter tracks standout retail campaigns across markets. From this continuous stream, we have extracted a selection that best captures the year’s strategic undercurrents. What makes them significant is less their format or category than the tensions they try to resolve: how to keep everyday life stable when everything feels unstable, how to make value felt rather than merely claimed, how to turn retail into a form of care without becoming paternalistic, and how to reconcile the hunt for low prices with the desire for dignity, pride and aesthetics. In the pages that follow, these campaigns are treated not as a simple “best of” reel, but as lenses to read those evolving expectations.

Taken together, these ads show how retail is rewriting its narratives in real time. They reveal not only what brands want to sell, but what they believe people most urgently need to hear about value, control and care in 2025.

THE THEATRE OF COMPENSORY RESILIENCE • 1 •

Retail in 2025 sells proofs of agency in a world that escapes consumer control. Facing structural anxiety triggered by economic uncertainty, post-pandemic precarity, and loss of institutional trust, consumers no longer seek objects but tangible demonstrations that they can still master something.

This archaeology of the everyday responds to the “permanence anxiety” of digital culture: facing algorithmic amnesia, physical objects become memorial anchors. Retail becomes a space for reaffirming agency, transforming the product into a certificate of psychological stability

IKEA (GREECE) *Nehctik.*



A countertop traverses time backwards. Ten years of family meals, birthday cakes and children’s drawings deconstruct. The kitchen becomes physical archive of moments that could have vanished. Every scratch proves you can anchor your biography somewhere permanent.



Scan to watch

REI CO-OP (USA) *Rewind the hike*



A gifted backpack triggers a reversed hike. Steps rewind, landscapes fold back. It’s not nostalgia: it’s the promise that this object will contain controllable future adventures. Agency wrapped as a gift.



Scan to watch

THE THEATRE OF COMPENSORY RESILIENCE • 2 •

IKEA (PORTUGAL) *Hidden Tags*

Find the oldest manufacturing tag in your IKEA furniture. Consumers discover their bookshelf is 15 years old, their table survived three moves. The furniture becomes a generational witness, proof that some objects traverse time.



Scan to watch

LEROY MERLIN (FRANCE) *Enzo and his daughter Paloma*

Enzo and his daughter build a cabin together in their living room. Each plank, each nail becomes conversation and promise. In world’s chaos, you can still create shelters, control your space, build something that lasts.



Scan to watch

THE AGE OF EXTREME PROOF... BY ABSURDITY • 1 •

In an era of authenticity fatigue, where 71% of consumers worry about AI content legitimacy and institutional distrust peaks, retail spectacularizes value to the absurd. Facing the "trust paradox", the more a brand claims authenticity, the less it's believed,

retailers abandon words that became hollow signifiers for extreme, irrefutable physical demonstrations. The absurd is the new reality regime where only objective, measurable, verifiable metrics count.

LIDL X PARKSIDE (INTERNATIONAL) *The pull*



A cordless drill tows a 300-ton Airbus A380 on airport tarmac. Absurdity certifies truthfulness. No storytelling could convince as effectively. If it can move the impossible, it can drill your wall.



Scan to watch

ALDI (AUSTRALIA) *Bottomless bag*



An ALDI bag never stops spitting out products: furniture, appliances, giant inflatable castle. Hyperbole transforms discount shopping into spectacle. This bottomless bag proves that with little, you get the extraordinary.



Scan to watch

THE AGE OF EXTREME PROOF... BY ABSURDITY • 2 •

COLUMBIA (USA) *Engineered for Whatever*

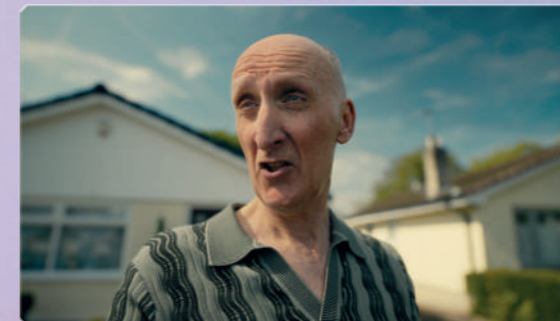
Animal attacks, falls, storms, injuries, all disasters chained together. Columbia doesn't sell safety but documented survival. If clothes resist all this, they'll handle your Sunday hike.



Scan to watch

ALDI (UK) *Special Buys (Mary)*

Mary sprints like an athlete to grab "Special Buys" before they disappear. ALDI transforms discount shopping into competition. Desire is born from temporary scarcity. Every grabbed item becomes trophy of victory.



Scan to watch

RETAIL AS THERAPEUTIC INFRASTRUCTURE • 1 •

Mental wellness is retail's new value frontier. In a world where 40% of Gen Z feels "almost always stressed", where digital anxiety is clinical epidemic, brands reposition as architects of

psychological environments. Consumption becomes tool for self-care, emotional regulation. Retailers sell psychological stability.

TESCO (UK) *It's not little thing, it's everything*



A cake says what words cannot: apology. A dish expresses gratitude that emails never could. The dinner table reunites what distance tried to separate. Tesco understands that food isn't nutrition—it's the infrastructure of emotional repair.



Scan to watch

IKEA (COLOMBIA) *Back to routine*



A mischievous elf scatters household chaos during vacation, toys everywhere, clothes dispersed, nothing contained. IKEA products restore order, but it's not about physical organization. It's about reclaiming mental space, proving that you can still impose structure when everything feels scattered.



Scan to watch

RETAIL AS THERAPEUTIC INFRASTRUCTURE • 2 •

WAYFAIR (UK) *Get it out of your head and into your home*

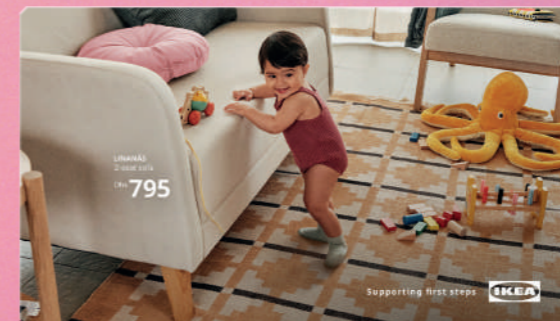
A woman walks through the city haunted by visions, fauteuils floating above benches, bookcases materializing on empty walls, her imagination spilling everywhere without containment. Wayfair offers exorcism: transform the mental chaos into physical reality. The act of materializing becomes therapeutic release.



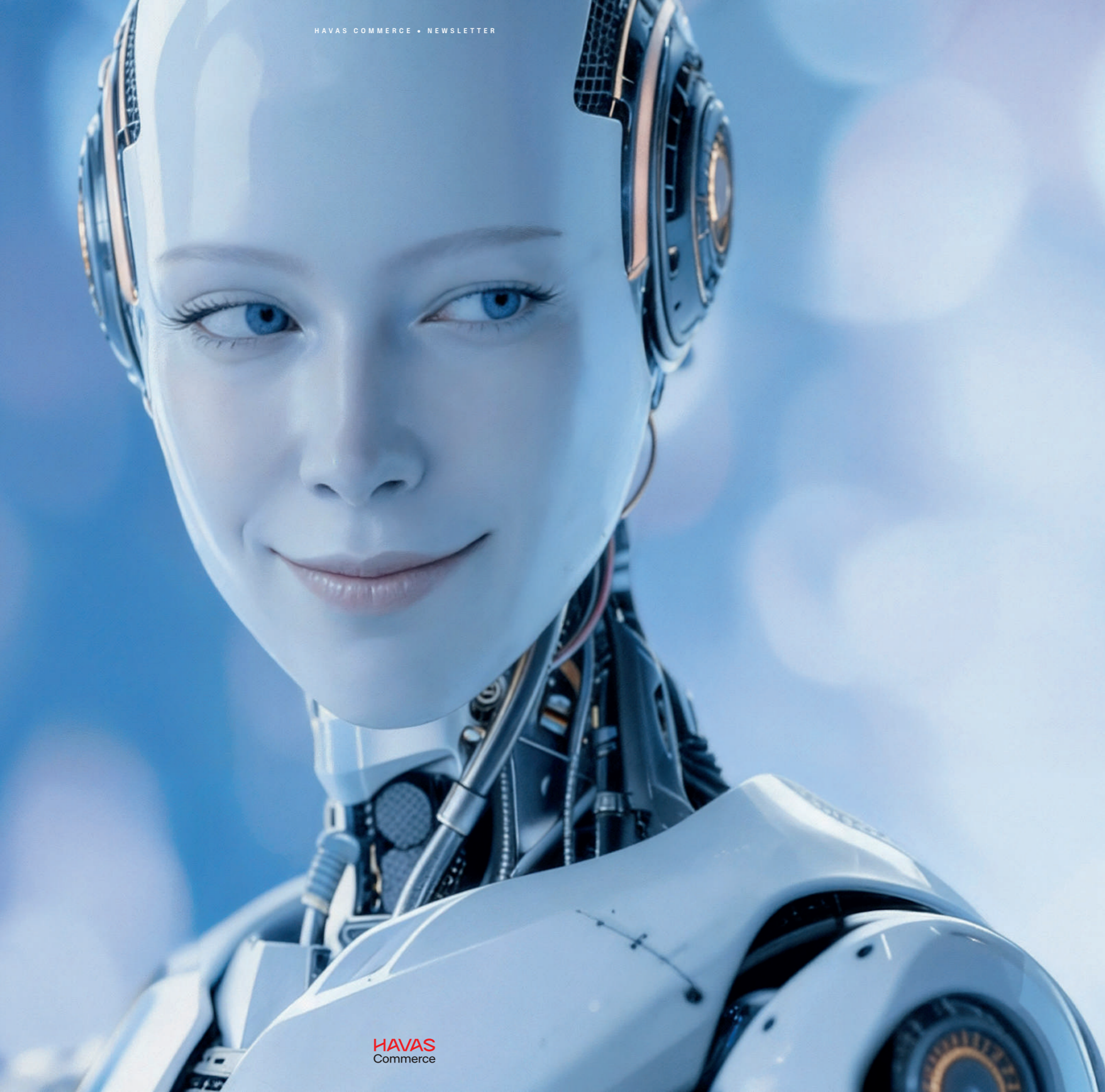
Scan to watch

IKEA (UAE) *Supporting first steps*

A child's world unfolds through exploration of their home, each IKEA piece becoming architecture for development. Every object supports first steps, first discoveries, the cognitive unfolding of a small human.



Scan to watch



4

CHAPTER

DESTINATION
2030:
SIX RETAIL
FUTURES
WITH AI
AT THE CORE



DESTINATION 2030: SIX RETAIL FUTURES WITH AI AT THE CORE.

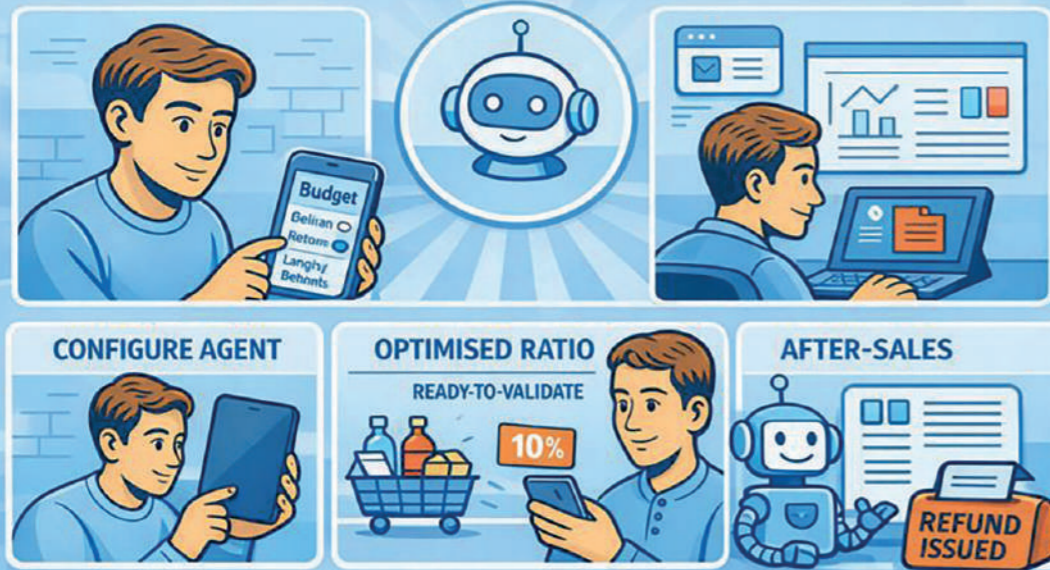
To understand how AI may reshape the retail experience by 2030, we explored five forward-looking scenarios with industry professionals, each illustrating a distinct but plausible evolution of consumer journeys, operational models, and ecosystem dynamics.

These scenarios do not predict the future but instead stress-test what becomes possible when today's emerging technologies reach full maturity and when retailers reorganize around automation, intelligence, and real-time orchestration.

While the scenarios vary widely in their assumptions and ambition, they share a common goal: to illuminate how AI could fundamentally reconfigure value creation across retail. Some probe the future of customer experience, others rethink production and supply, and still others explore new forms of ecosystem collaboration or next-generation decision models. Together, they form a structured lens through which to examine the opportunities, and constraints, of an AI-accelerated retail landscape.

SCENARIO 1

AUTONOMOUS AGENT MARKET



ACCORDING TO
HAVAS COMMERCE STUDY:

46%

OF RETAIL PROFESSIONALS
BELIEVE THIS SCENARIO IS
THE MOST LIKELY AND CREDIBLE
FOR THE FUTURE

HOW THIS SCENARIO COULD WORK:

An AI agent acts for the consumer as a private shopper, connected to store catalogs and current promotions. It optimizes the basket (price, substitution, availability), reserves the delivery slot or click & collect, applies coupons, and verifies loyalty. As soon as budget, deadlines, and preferences are met, the order is placed. In case of stockout, the agent suggests an equivalent alternative (national brand or private label) without inflating the bill. Returns, refunds, warranty extensions, and after-sales service follow-up are managed automatically via the store's OMS/CRM.

SCENARIO 2

DISTRIBUTED WORKSHOPS & ROBOTIC LOGISTICS



ACCORDING TO
HAVAS COMMERCE STUDY:

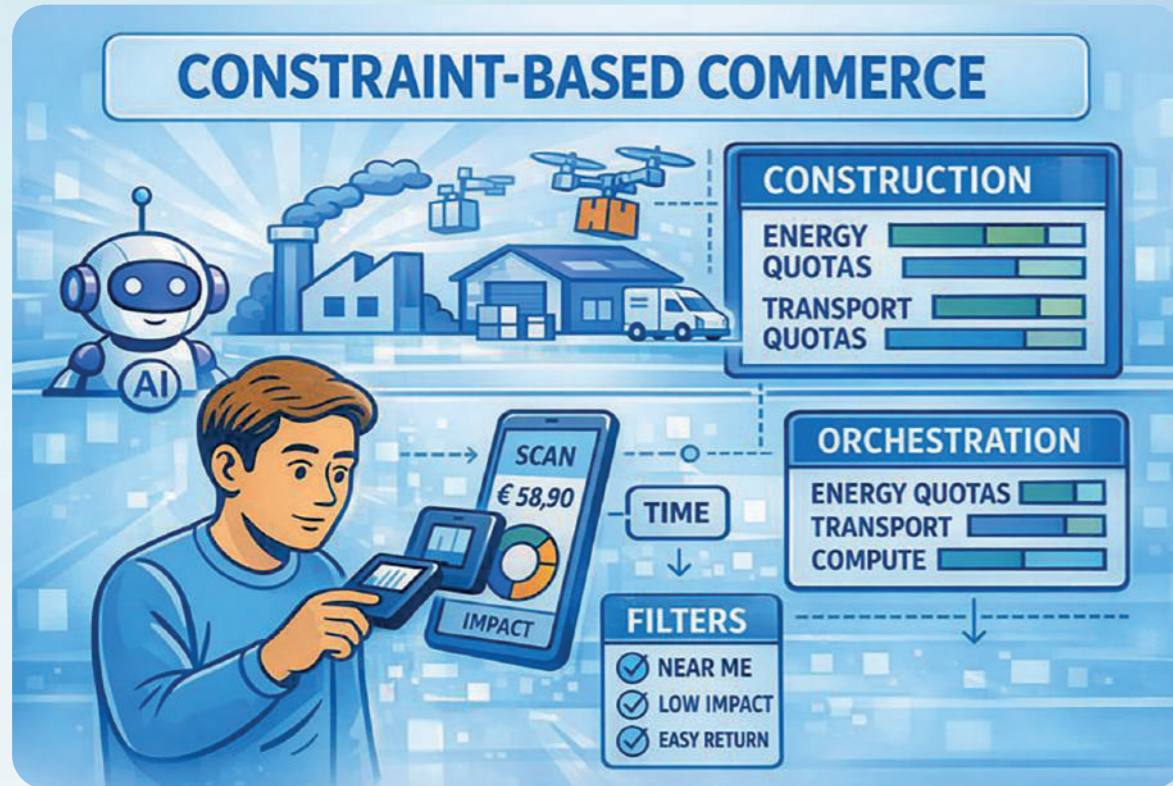
32%

OF RETAIL PROFESSIONALS
BELIEVE THIS SCENARIO IS
THE MOST LIKELY AND CREDIBLE
FOR THE FUTURE

HOW THIS SCENARIO COULD WORK:

"Close to demand" production directly supplies stores, drives, and collection points. AI-driven micro-units manufacture best-sellers and short runs on demand (private label, seasonal), while robots and drones handle replenishment and last-mile delivery. In-store, the planogram adjusts to actual sales and weather whilst in e-commerce, proposed dates consider manufacturing and tour capacity. Consumers get reliable deadlines and more relevant products, while the retailer reduces stockouts, shrinkage, and transport costs.

SCENARIO 3



ACCORDING TO HAVAS COMMERCE STUDY:

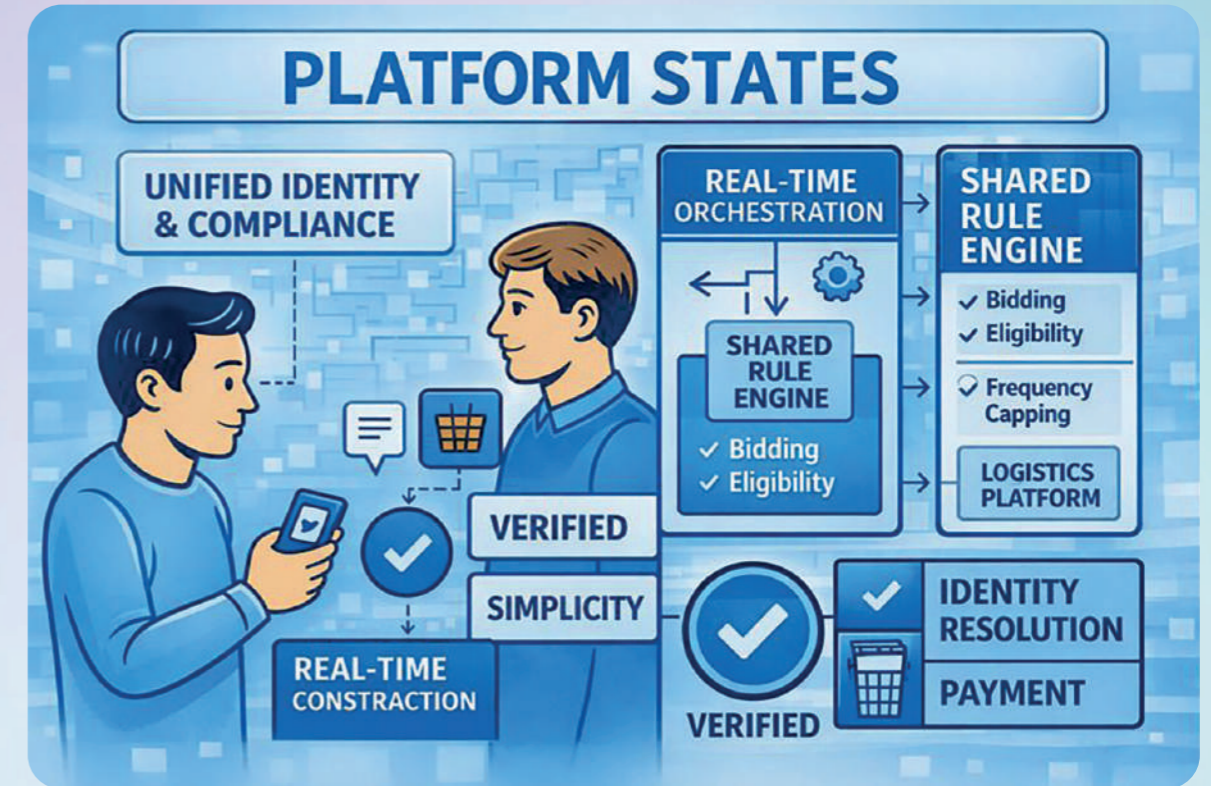
21%

OF RETAIL PROFESSIONALS BELIEVE THIS SCENARIO IS THE MOST LIKELY AND CREDIBLE FOR THE FUTURE

HOW THIS SCENARIO COULD WORK:

Each basket displays a simple score (in transport/energy/compute impact) that weighs in recommendations, final price, and delivery options. The retailer highlights repair, refurbished items, and spare parts with clear guarantees and in-store availability. "Near me," "low impact," and "easy return" filters are available by default. The consumer chooses a clear compromise between use value, budget, and footprint, while the retailer manages its energy/ compute quotas and improves margin mix and avoided return rate.

SCENARIO 4



ACCORDING TO HAVAS COMMERCE STUDY:

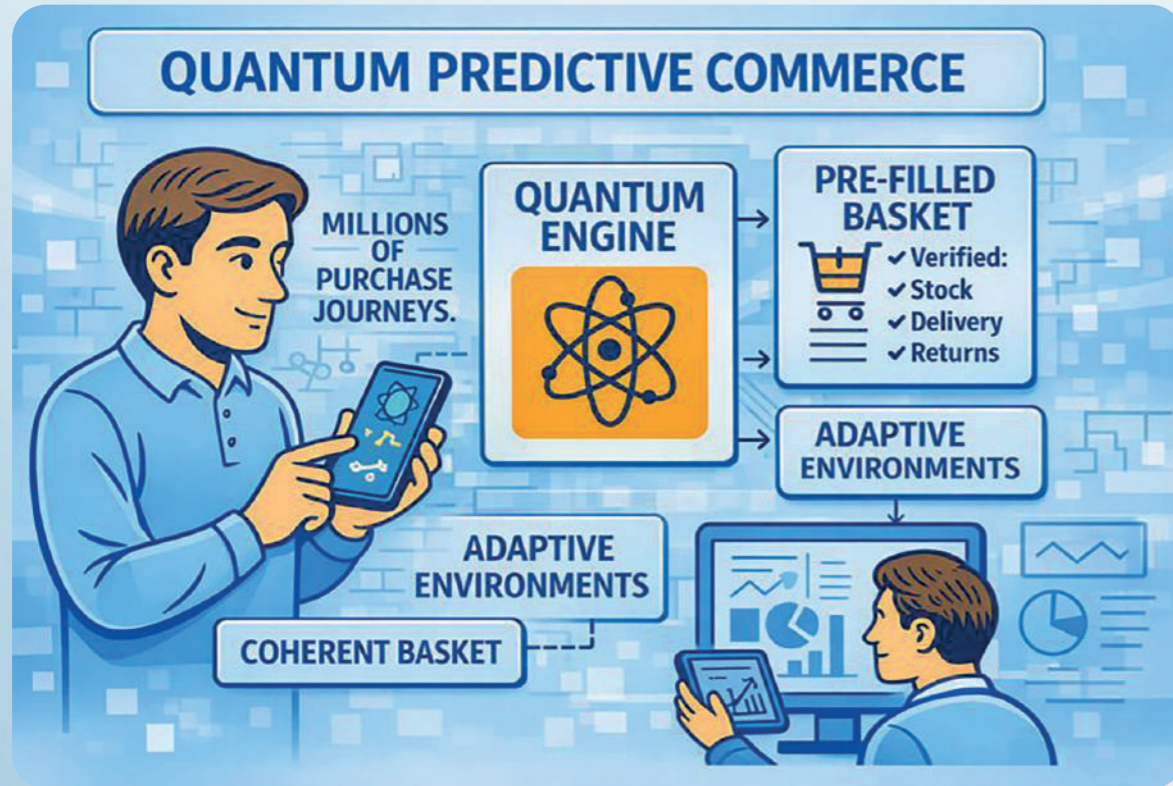
29%

OF RETAIL PROFESSIONALS BELIEVE THIS SCENARIO IS THE MOST LIKELY AND CREDIBLE FOR THE FUTURE

HOW THIS SCENARIO COULD WORK:

Large ecosystems link identity, payment, retail media, logistics, and compliance. The consumer identifies themselves once; taxation, anti-fraud measures, and product verifications are settled upon payment. RMN campaigns, prices, and display order adjust in real-time according to common rules. The experience is continuous between inspiration (content, live, influence) and purchase (basket, financing, delivery). For the retailer, access to these capabilities boosts reach and conversion. For the consumer, everything is seamless and verified.

SCENARIO 5



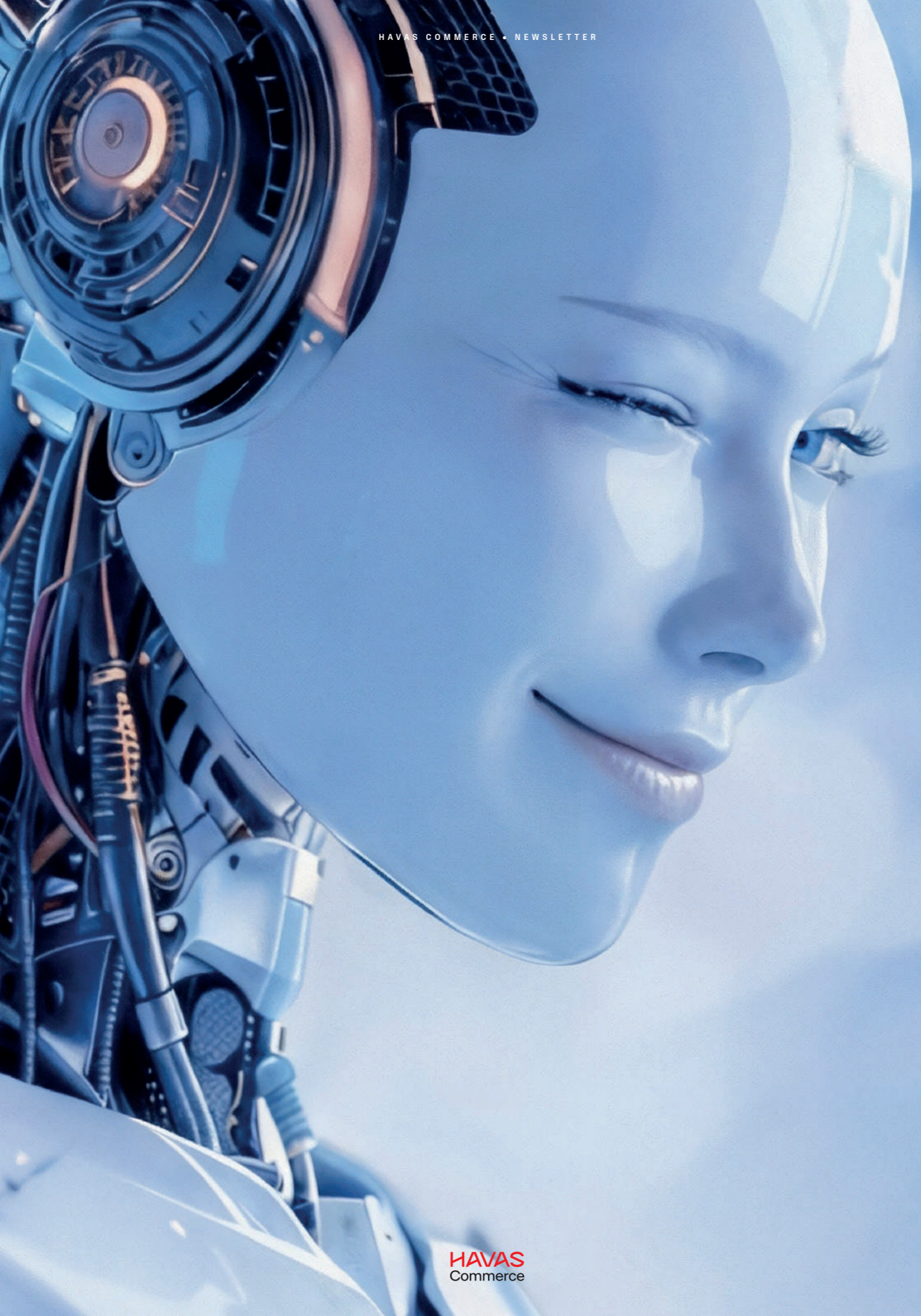
ACCORDING TO
HAVAS COMMERCE STUDY:

28%

OF RETAIL PROFESSIONALS
BELIEVE THIS SCENARIO IS
THE MOST LIKELY AND CREDIBLE
FOR THE FUTURE

HOW THIS SCENARIO COULD WORK:

Thanks to quantum computing, retailers simulate millions of possible purchase journeys in real-time. For each consumer, the system selects the offer, price, channel, and moment that maximize value and margin while respecting constraints (stock, deadlines, "Carbon+Compute"). In-store, layout and augmented advisors adjust to the most probable scenario and online, the homepage, search, lives, and RMN reconfigure in seconds. The basket is "pre-filled" with verified proposals (availability, returns, loyalty), and micro-promotions only open when they trigger a profitable purchase. For the consumer this means: less effort, fairer choices, and promises kept.



HAVAS COMMERCE IN 2025 IT WAS...

A LOOK BACK AT
SOME OF OUR PROJECTS
THAT MIGHT BE
USEFUL TO YOU

3RD EDITION OF THE GLOBAL RETAIL SEMINAR



In May 2025, we held the third edition of our international Havas Commerce Experts retail seminar: "Havas Commerce 2025. Accelerate. Innovate. Converged." Bringing together retail specialists and business development leaders from across the network, the event focused on how to strengthen our positioning with retailers, better address their challenges and make Havas a more attractive partner. We exclusively unveiled a new global study on the key factors that drive retailers to choose an agency, and used the seminar as a collaborative platform to share successes, tools and solutions, enriched by sessions where clients challenged and contributed to our thinking.

THANK YOU TO ALL PARTICIPANTS, AND SEE YOU NEXT YEAR!

INTERNATIONAL & LOCAL STUDIES

SECOND HAND STUDY

THE NEW CONSUMPTION STANDARTS

13 COUNTRIES, 17,000 + CONSUMERS SURVEYED

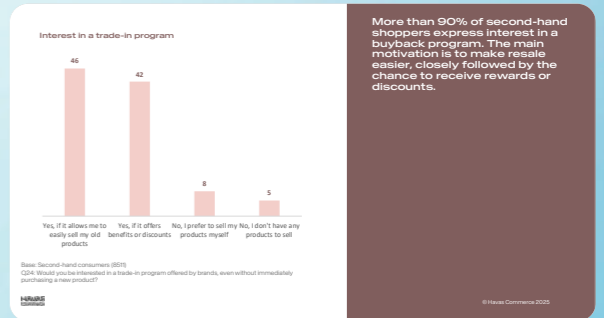
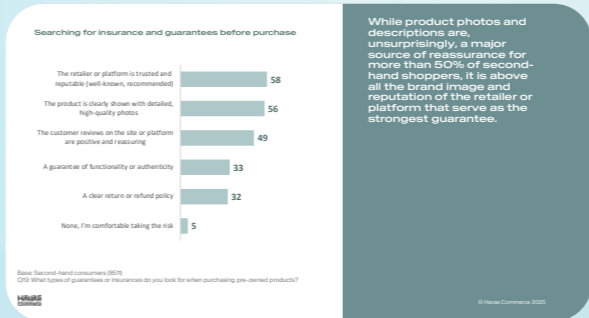
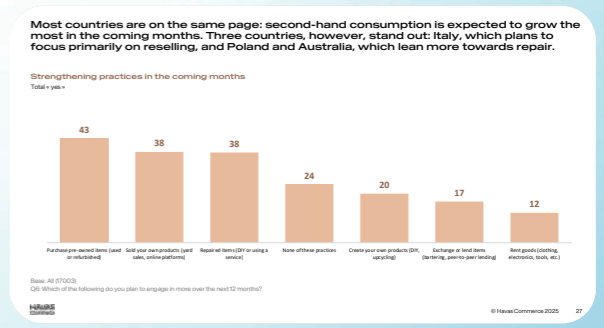
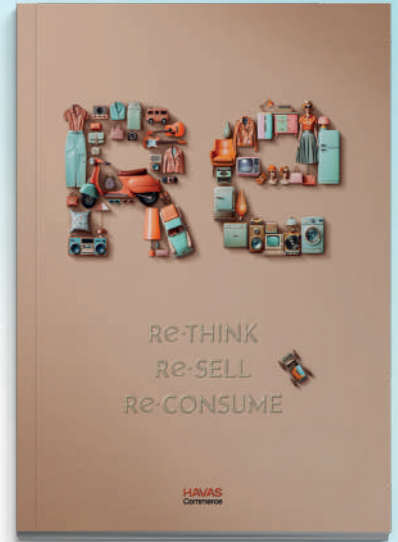
The rise of alternative shopping habits, including second-hand buying, renting, repairing, and DIY, across categories like fashion, electronics, and home goods.

Consumers' motivations and barriers to second-hand shopping, from price and sustainability to concerns about quality, trust, and convenience.

Perceptions of retailers and platforms offering second hand, including inflation-driven savings and growing interest in circular economy solutions.

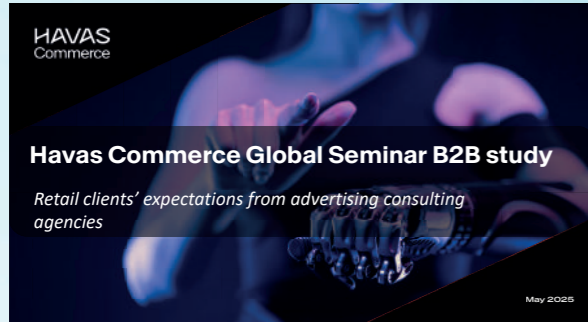
The impact of economic and environmental trend, including inflation-driven savings and growing interest in circular economy solutions.

What consumers expect from retailers to improve and scale second-hand shopping, in terms of service, innovation, and support.



RETAIL B2B STUDY

RETAILERS EXPECTATIONS TOWARD AGENCIES



23 COUNTRIES, 256 TOP-MANAGEMENT RETAILERS FROM 100+ PEOPLE COMPANIES

Strategic priorities and challenges for retailers over the next 12 to 18 months, from price pressure and store transformation to omnichannel acceleration and sustainability.

What retailers expect from consulting agencies: key services, collaboration models, and selection criteria, from strategic guidance to operational support.

Retailers' expectations regarding innovation, especially around AI, data, automation, and retail media, and their impact on agency choice.

Awareness and perception of Havas Group and Havas Commerce, compared to global competitors, including retail-specific expertise.

How to increase Havas Commerce's value: exclusive services, tools, and positioning strategies to become a preferred partner for retailers.

PURCHASING POWER

UNDERSTAND DECISION-MAKING DYNAMICS



12 COUNTRIES, 9000+ CONSUMERS SURVEYED

How consumers perceive and adjust their purchasing power, including what they preserve, sacrifice, or monitor more closely.

The psychological and emotional factors shaping price perception and the definition of a "fair" or "good" price in various product categories.

Trade-off strategies in constrained budgets: priority categories, concessions accepted, and areas where consumers refuse to compromise.

Evolving expectations toward value: balance between price, quality, innovation, and ethical commitments.

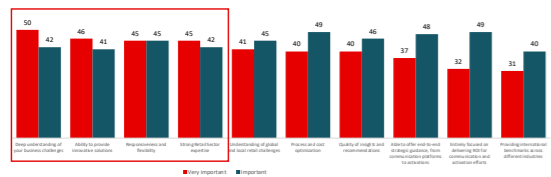
Perceptions and expectations around private labels and discount retail, including trust, quality, innovation potential, and their role in loyalty.

What are your primary objectives for the next 12 to 18 months?



Base: All (256)
Question 9: What are your primary objectives for the next 12 to 18 months?
© Havas Commerce 2025

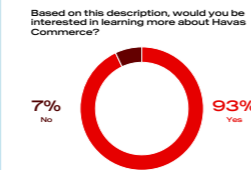
How important are the following factors in your decision to continue working with an agency?



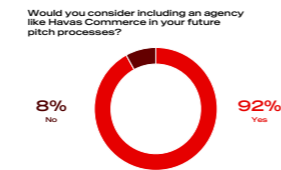
Base: All (256)
Question 11: How important are the following factors in your decision to continue working with an agency?
© Havas Commerce 2025

Havas Commerce is a new and evolving initiative within Havas Group, designed to support retailers globally. It aims to:

- Develop a dedicated knowledge hub providing deep insights into global retail trends, consumer expectations, and industry challenges.
- Build a network of business experts delivering high-performance solutions by leveraging the expertise of the Havas network.

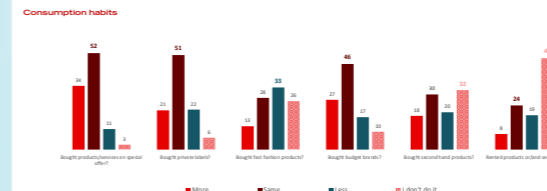


Base: All (256)
Question 24: Based on this description, would you be interested in learning more about Havas Commerce?
© Havas Commerce 2025



Base: All (256)
Question 25: Would you consider including an agency like Havas Commerce in your future pitch processes?
© Havas Commerce 2025

Consumers double down on deals and private labels, while fast fashion and rentals lose ground.



Base: All (907)
Q24: In the last months, did you have more, the same or less...
© Havas Commerce 2025

Trusted for their quality, discount chains now earn credit for innovation...



Base: Consumers, except Vietnamese ones, visiting discount chains (8925)
Q28: Do you find the quality of products from discount chains is equivalent to that of traditional ones?
Base: Consumers, except Vietnamese ones, visiting discount chains (8925)
Q29: How do you feel about buying products from discount VS traditional chains?
© Havas Commerce 2025

THEMATIC BOOKS



PURCHASING POWER OBSERVATORY

Navigating consumer choices amid economic shifts

As economic pressures rise worldwide, consumers are rethinking the way they shop, weighing value, loyalty, and trade-offs more carefully. Insights from over 9,000 shoppers across 12 countries and 4 continents reveal how inflation is reshaping consumption, from the adjustments consumers make to their spending habits to the trade-offs they navigate between needs and wants. The study also highlights how different generations and income groups approach rising prices, offering a detailed, category-by-category view of evolving purchasing strategies, value priorities, and brand expectations. These findings are now brought together in our latest book, providing brands and professionals with a clear roadmap to understand consumer behavior and successfully navigate today's rapidly changing retail landscape.



SECOND-HAND

How buying pre-loved has become the new trend

The Havas Commerce study on the second-hand market uncovers a global shift in consumer attitudes toward circular consumption, driven by economic pressures, ecological awareness, and rising expectations around trust and product quality. While motivations vary across cultures, the trend reflects a compelling mix of emotional pleasure, ethical considerations, and practical concerns about product condition. Consumers increasingly expect brands to integrate second-hand into retail experiences, backed by strong guarantees, transparent information, and repair services that build confidence. Our new book dives deep into these insights, showing how second-hand is no longer a niche market but a vibrant space where reliability and authenticity transform pre-loved goods into a central, compelling part of the modern retail experience.

NEWS LETTERS

Every month we release a newsletter (Follow the World of Commerce). It identifies and analyses the global initiatives that should not be missed during the month. It reveals the latest major communication

campaigns by retailers around the world.

It highlights the weak signals in retail. Finally, it follows the major retail leaders in their initiatives.



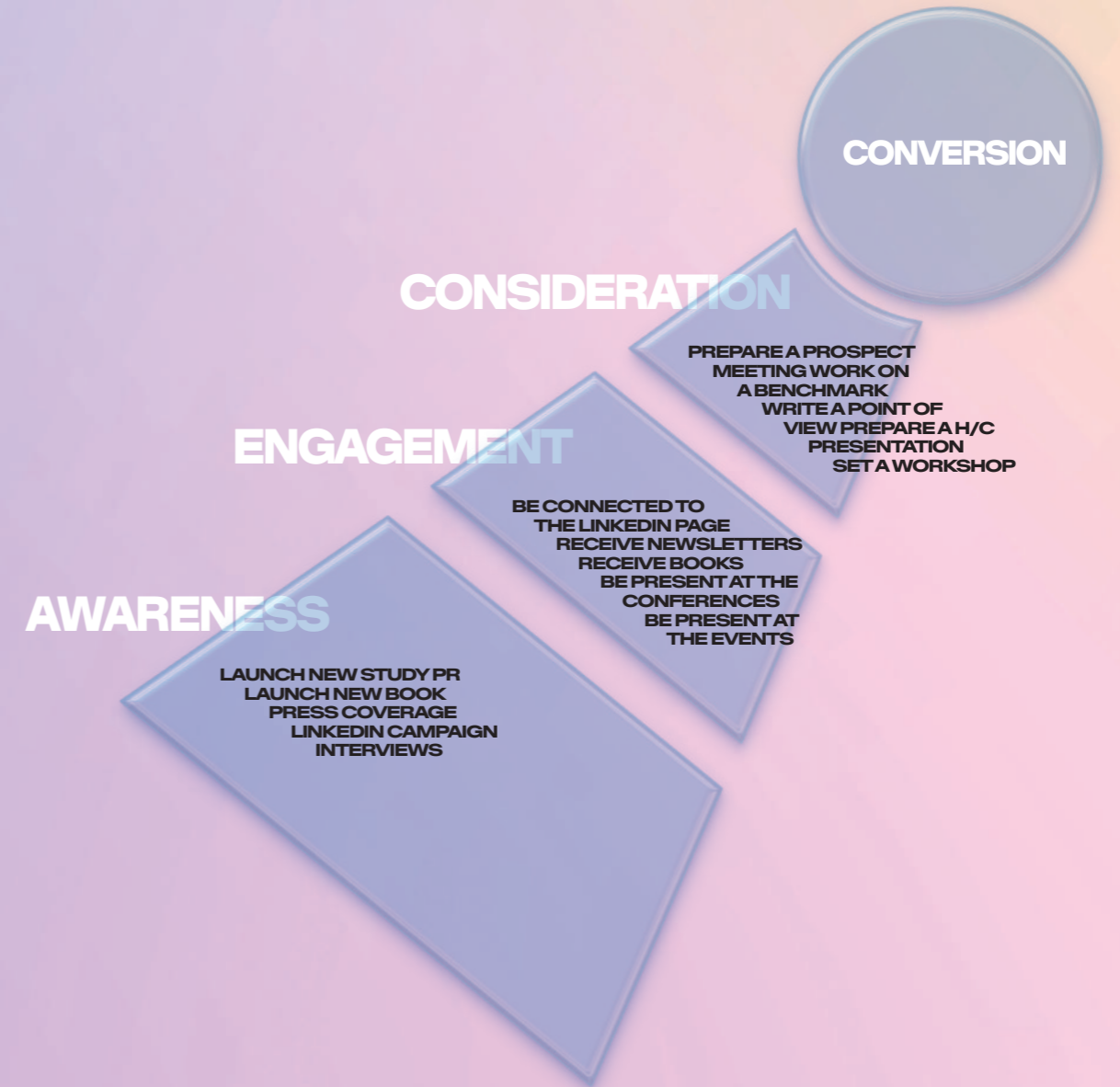


3 MISSIONS TO UNLOCK INNOVATIVE NEW SOLUTIONS



HOW TO LEVERAGE OUR CONTENTS & KNOWLEDGE

HAVAS VILLAGE PARTNER FOR RETAIL GROWTH



**THE HAVAS COMMERCE
INTERNATIONAL TEAM
WISHES YOU A WONDERFUL 2026
AND LOOKS FORWARD TO WORKING
WITH YOU VERY SOON
ON NEW PROJECTS**

HAVAS
Commerce



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