

Europe Retail Analytics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

Europe Retail Analytics Market Analysis

The Europe retail analytics market size stood at USD 3.23 billion in 2025 and is projected to reach USD 6.81 billion by 2030, registering a 16.1% CAGR during the forecast period. Ongoing digital-market reforms, elevated energy prices, and the EU Digital Markets Act are steering retailers toward advanced data platforms that improve operating margins and regulatory compliance. Cloud platforms underpin this transition because they scale on demand, integrate disparate data types, and cut capital expenditure. Edge analytics is spreading through hypermarkets as retailers push real-time shelf monitoring, while AI-enabled dynamic pricing helps defend gross margins in an inflationary environment. Country dynamics remain heterogeneous: Germany drives spending today, but Italy, Spain, and several Central and Eastern European countries are expanding faster. A widening gap in data-science talent and stricter privacy enforcement could restrain the pace of deployments for some operators.

Europe Retail Analytics Market Trends and Insights

Data-driven personalization lifts in-store conversion

Retailers deploying cloud-based recommendation engines now feed in-store behavior into the same decision hubs that analyze web journeys, enabling real-time offers at the shelf or check-out. Early adopters report conversion uplifts between 15% and 25%, which in turn drives budget reallocation from blanket promotions to targeted incentives. Successful programs rely on privacy-by-design architectures that tag consent, aggregate profiles, and maintain local data residence. Demand concentrates in

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Germany, France, and the United Kingdom, where high shopper density and loyalty-card maturity provide rich data streams. Vendors that simplify identity resolution across legacy point-of-sale feeds and e-commerce logs capture most of the growth. The resulting personalization loop supports the broader shift toward experience-led differentiation rather than price competition.

AI-powered pricing engines optimise margins in inflationary Europe

Food and general merchandise margins came under pressure when euro-area food inflation peaked at 15% in early 2024. Retail finance departments that embraced algorithms capable of re-pricing SKUs hourly saw 3-5% margin relief even as input costs remained volatile. The European Central Bank confirms that firms alter prices more frequently during high-inflation periods, reinforcing the commercial logic for analytics platforms that automate elasticity modelling. Dynamic engines ingest competitor crawls, energy surcharges, and real-time demand to suggest optimal shelf prices and markdown cadences. Retailers in Germany and Italy moved fastest because of intense discounter competition, setting a regional template others now follow. Cloud deployment dominates because inference workloads spike during promotion events and must scale without hardware bottlenecks.

Shortage of retail data-science talent pool

Three-quarters of German retailers reported hiring delays for data roles in 2024, and similar patterns surfaced in France and the United Kingdom. Competition from fintech and deep-tech verticals raises salary benchmarks beyond what many retailers can absorb. Vendors respond by embedding automated model-building and natural-language query layers so that category managers can run forecasts without writing code. Managed-service engagements gain traction as well, with providers offering fractional data scientists on subscription. Over the medium term, EU-funded reskilling initiatives could ease constraints, but until then, platform usability remains a key purchase criterion inside the European retail analytics market.

Other drivers and restraints analyzed in the detailed report include:

Proliferation of edge analytics for real-time shelf monitoring / Unified commerce mandates single view of customer / Data-privacy tightening under GDPR and forthcoming ePrivacy Regulation /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Cloud options drew 58.1% of spending in 2024, confirming that most retailers prefer outsourcing compute and storage layers for analytics workloads. The Europe retail analytics market size attributed to cloud is forecast to climb at an 18.2% CAGR until 2030 as enterprises migrate batch reporting, AI training and real-time event streaming pipelines off-premise. Much of the momentum comes from periodic promotional surges-Black Friday, Singles' Day, or private-label loyalty drives-that stress legacy data centers. SAP's EMEA cloud revenue jumped 30% year-over-year in Q1 2025, mirroring this migration trend. On-premise clusters still run in fashion and luxury houses with stringent intellectual-property controls, yet their share will shrink as confidential-computing chips harden public-cloud security postures. Hybrid architectures bridge the gap where in-store cameras process images locally but upload aggregated metrics to central lakes, supporting GDPR locality and low-latency decisions.

Scalability explains the near-term advantage, but cost discipline sustains it. Retailers exposed to energy spikes discovered that moving compute off-site neutralizes power volatility, because hyperscalers hedge electricity contracts longer term. That financial predictability resonates with finance chiefs tasked to safeguard EBITDA while reinvesting in growth. Vendor competition now shifts to value-added services-verticalized data models, pre-trained pricing algorithms, and one-click dashboards for merchandisers. These differentiators will shape revenue capture inside the cloud portion of the Europe retail analytics market over the next five years.

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Marketing and Customer Insights secured 29.6% revenue in 2024 because retailers target loyalty retention and individualized promotions amid relentless competition. The module's predictive-segmentation engines and path-to-purchase attribution models remain foundational for omnichannel strategies. Yet, Supply-Chain and Fulfilment is expected to clock a 17.3% CAGR to 2030, the fastest among all modules, as retailers reengineer networks for resilience. Henkel's EUR 4 million saving through data-driven energy optimization in 2024 showcase tangible ROI.

Strategy and Planning dashboards knit KPIs from merchandising, finance, and operations into board-level scorecards, creating a change-management backbone. Merchandising and Category Optimization modules use AI to simulate basket affinities and recommend assortment refreshes every season. Store-operations analytics-especially computer vision for shrinkage-is picking up speed as unionized retailers look to automate repetitive audits. Financial Management modules, including real-time gross-margin tracking, remain essential, particularly in food retail, where dozens of commodity inputs move daily. Together, these sub-segments illustrate how the Europe retail analytics industry delivers value across both revenue growth and cost-containment objectives.

Europe Retail Analytics Market is Segmented by Mode of Deployment (On-Premise, Cloud, and Hybrid), Module Type (Strategy and Planning, Marketing and Customer Insights, and More), Business Size (Small and Medium Enterprises and Large Enterprises), Retail Format (Brick-And-Mortar, E-Commerce, and Omnichannel Retail), and Country. The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

SAP SE / Oracle Corporation / IBM Corporation / SAS Institute Inc. / Microsoft Corporation / QlikTech International AB / Tableau Software LLC / MicroStrategy Incorporated / Zoho Corporation Pvt. Ltd. / Alteryx Inc. / RetailNext Inc. / Blue Yonder GmbH / NielsenIQ / ThoughtSpot Inc. / Sisense Ltd. / Domo Inc. / Looker Data Sciences (Google) / Snowflake Inc. / Databricks Inc. / C3.ai Inc. /

Additional Benefits:

The market estimate (ME) sheet in Excel format /
3 months of analyst support /

Table of Contents:

1 INTRODUCTION

- 1.1 Study Assumptions and Market Definition
- 1.2 Scope of the Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET LANDSCAPE

- 4.1 Market Overview
- 4.2 Market Drivers
 - 4.2.1 Data-driven personalization lifts in-store conversion
 - 4.2.2 AI-powered pricing engines optimise margin in inflationary Europe
 - 4.2.3 Proliferation of edge analytics for real-time shelf monitoring

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- 4.2.4 Unified commerce mandates single view of customer
- 4.2.5 EU Digital Markets Act pushing retailers to own first-party data
- 4.2.6 Energy-efficiency analytics adopted to curb soaring utility bills
- 4.3 Market Restraints
 - 4.3.1 Shortage of retail data-science talent pool
 - 4.3.2 Data-privacy tightening under GDPR and ePrivacy Regulation
 - 4.3.3 Legacy POS fragmentation impedes data integration
 - 4.3.4 Capital-expenditure freeze among SME retailers
- 4.4 Value Chain Analysis
- 4.5 Regulatory Landscape
- 4.6 Technological Outlook
- 4.7 Porter's Five Forces Analysis
 - 4.7.1 Threat of New Entrants
 - 4.7.2 Bargaining Power of Buyers
 - 4.7.3 Bargaining Power of Suppliers
 - 4.7.4 Threat of Substitutes
 - 4.7.5 Intensity of Competitive Rivalry
- 4.8 Impact of Macroeconomic Factors on the Market

5 MARKET SIZE AND GROWTH FORECASTS (VALUES)

- 5.1 By Mode of Deployment
 - 5.1.1 On-Premise
 - 5.1.2 Cloud
 - 5.1.3 Hybrid
- 5.2 By Module Type
 - 5.2.1 Strategy and Planning
 - 5.2.2 Marketing and Customer Insights
 - 5.2.3 Financial Management
 - 5.2.4 Store Operations and Loss Prevention
 - 5.2.5 Merchandising and Category Optimisation
 - 5.2.6 Supply-Chain and Fulfilment
- 5.3 By Business Size
 - 5.3.1 Small and Medium Enterprises
 - 5.3.2 Large Enterprises
- 5.4 By Retail Format
 - 5.4.1 Brick-and-Mortar
 - 5.4.2 E-Commerce
 - 5.4.3 Omnichannel Retail
- 5.5 By Country
 - 5.5.1 United Kingdom
 - 5.5.2 Germany
 - 5.5.3 France
 - 5.5.4 Italy
 - 5.5.5 Spain
 - 5.5.6 Rest of Europe

6 COMPETITIVE LANDSCAPE

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6.1 Market Concentration

6.2 Strategic Moves

6.3 Market Share Analysis

6.4 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials, Strategic Information, Market Rank/Share, Products and Services, Recent Developments)

6.4.1 SAP SE

6.4.2 Oracle Corporation

6.4.3 IBM Corporation

6.4.4 SAS Institute Inc.

6.4.5 Microsoft Corporation

6.4.6 QlikTech International AB

6.4.7 Tableau Software LLC

6.4.8 MicroStrategy Incorporated

6.4.9 Zoho Corporation Pvt. Ltd.

6.4.10 Alteryx Inc.

6.4.11 RetailNext Inc.

6.4.12 Blue Yonder GmbH

6.4.13 NielsenIQ

6.4.14 ThoughtSpot Inc.

6.4.15 Sisense Ltd.

6.4.16 Domo Inc.

6.4.17 Looker Data Sciences (Google)

6.4.18 Snowflake Inc.

6.4.19 Databricks Inc.

6.4.20 C3.ai Inc.

7 MARKET OPPORTUNITIES AND FUTURE OUTLOOK

7.1 White-space and Unmet-need Assessment

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