

COMPETITION RESET 2026/27

European Retailer Purchasing Alliances In The Age Of EUDP, AI & Retail Media

Retail consolidation is accelerating in European grocery and changes are happening by the minute that will have major implications for your 2026 and 2027 forecasts and targets.

These changes are being complicated by pressure on suppliers to streamline portfolios and provide pan-European SKUs. Major grocery retailers are forming new alliances across markets. Carrefour and Cooperative U have paired up with RTG Retail to get scale across France & Germany in the Concordis alliance. This is happening while Carrefour sells its operations in Italy to New Princes Group and opens an auction for Poland. Aura Retail – the alliance with Intermarche, Auchan, and Casino will work with Everest, just as Auchan announces major remodeling programs in all markets.

Several urgent questions need immediate answers. Our in-person workshop will answer them, before an entire year passes and opportunities are missed:

- 1. The Analyst View:** What are the major changes in merchandising, portfolio, and assortment taking place at key retailers as they remodel their hypermarkets at an accelerated pace?
- 2. The Lawyer View:** What can we expect in 2026/2027 from a legal perspective – what changes are coming into view as price ceilings spread from France to Serbia, and potentially now Italy, Greece, Croatia, and Romania? What are the differences in legal views on national topics – such as Aura Retail, RTG, or Superunie – versus Pan-EU topics?
- 3. The Financial Consultant View:** How are accounting standards changing, particularly with new rulings such as Google, DeliveryHero, and TikTok, impacting the ways retailers are allowed to market and sell in markets without paying local taxes?
- 4. The Tech View:** New technologies in Retail Media and AI are transforming supplier-retailer JBPs

Join us for an in-depth expert conversation and chance to network with a wide range of companies on November 13th, 2025 in Brussels, at the NH Brussels Airport, from 10:30 am-2:30 pm.

Several foundational changes in the ways that European suppliers work with grocery and drogerie retailers have been acknowledged but not fully explored in an age of unprecedented consolidation among Europe's largest full-assortment grocery groups.

What will be discussed:

- The consumer landscape
- Changes in retailer operating models
- Expectations of changes in European legal, tax, and accounting systems

What will NOT be discussed:

- Retailer pricing strategies
- Retailer negotiation tactics or negotiation policies
- Ways suppliers can avoid engaging with buying alliances.

FUTURE RETAIL TALK

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If that were not enough, there is more.

Firstly, Europe has a new Commissioner for European Competition, Teresa Ribera from Spain. Ribera has promised to transform the ways that companies in Europe compete. Ribera has expressed the desire to encourage more companies to embed sustainability in international contracts and is taking steps to encourage changes in this direction.

Secondly, companies operating in the EU's retail sector will face the impact of new trade measures like the European Union Deforestation Regulation (EUDR) and the changing landscape of tariffs. Additionally, they also encounter national differences within the EU for products subject to excise tax, such as beverages.

Thirdly, Retail Media Networks have grown, changing the nature of JBPs.

Fourthly, Agentic AI is rapidly changing the ways that ordering, shipping, and negotiations will be conducted.

Finally, consolidation in grocery, especially in France, Belgium, and the Netherlands, is changing the nature of which European grocery retailers look at their national and international alliances. In general, 2026 is the age of national alliances tied to international contracts.

Any one of these topics would be a 'wake up call.' Taken together, there can be no question, Commercial relations between European retailers and their suppliers will change in both predictable and unpredictable ways.

At this conference, our speakers will explore the predictable changes and encourage you to venture into scenarios when considering the unpredictable nature of some of the big changes coming in 2026 and beyond. Prepare yourself for January negotiations, come to Brussels.

Where:
NH BRUSSELS AIRPORT

When:
13 NOVEMBER 2025

Featured Speakers:

Ray Gaul, Retail Cities
a future of retail business
intelligence advisory group

Pablo González de Zárate
erato, an EU single market
competition law firm

Jochen Vankerckhoven and
Kristof Van Ael
Alongsight, a trade
compliance accounting firm

THE AGENDA

10:30-11:15

The Five Reasons Why Retailer-Supplier Relations will be Different in 2028, by Ray Gaul, Retail Cities

11:15-12:00

What's About to Change in European Competition Law? By Pablo González de Zárate, Erato

12:00-13:00

Trade, Traceability & Taxation: Retail's Strategic Response to Tariffs, EUDR, and Excise

Part 1 - Overview of the EU Deforestation Regulation (EUDR) and its impact on retailers. Implementing due diligence, supplier data management, and traceability tools. Linking EUDR to sustainability and trade strategies.

By Jochen Vankerckhoven, Partner Customs & Trade Compliance, Alongsight

Part 2 - The impact on European prices from the global tariff shakeup and the EU's different excise tariffs on the retail sector..

By Kristof Van Ael, Partner Customs & Trade Compliance, Alongsight

13:00-13:30

Networking Lunch Break

13:30-14:00

New Technologies Shaping JBPs. By Ray Gaul, Retail Cities

14:00-14:30

Buying Alliance Landscape – by Channel & Country – 2018 compared to 2028. By Ray Gaul, Retail Cities

Fee

€950 per person

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Our Experts



Pablo González de Zárate



Pablo is a partner at règula, a Spanish legal boutique specialized in competition law. He has practiced competition law for more than 13 years, and has extensive experience in the sector of retail consumer goods, where he has represented several important players before both the European Commission and the Spanish Competition Authority. Pablo is recognized as an expert in this field by the main legal directories.

Ray Gaul



Ray is a retail expert that frequently comments on the future of pan-European retail competition, especially in grocery-selling channels. He has been asked to provide his views on European Buying Alliances at major association meetings over the years including at AIM (Brussels), ILEC (Paris), the Consumer Goods Forum (Paris), and the PLMA (Amsterdam). Further, Ray has developed data products to help manufacturers measure the true share of buying alliances while the head of global retailer data at Kantar and again as head of insights at Retail Cities.



Jochen Vankerckhoven



Jochen is the Co-founder and Managing Partner of Alongside, a Belgium-based consultancy specializing in trade compliance and sanctions. A former in-house compliance professional and legal advisor, he brings over a decade of experience advising multinationals in sectors such as food, retail, aerospace, chemicals, and automotive. Jochen is known for his pragmatic “no fluff, just results” approach and his ability to translate complex regulatory frameworks into actionable business strategies.

Kristof Van Ael



Kristof is Co-founder and Partner at Alongside, leading the Global Trade, Customs & Excise practice. With more than a decade of experience, he has worked extensively with multinational clients in the food, automotive, pharmaceutical, and retail sectors. His expertise spans customs valuation, excise optimization, and regulatory strategy, with a strong track record of achieving efficiency gains and cost savings through compliance design.





Retail Cities is a global market research and consultancy specialist business, incorporated in Delaware, USA in 2020. The company delivers services using a network of experts working across all continents. Each expert brings a wealth of experience in retail adding a richness of examples and best practices to our engagements and publications. We believe that retail is changing quickly and everywhere. We enable our clients to stay ahead of these changes and compete with confidence. We work with clients to right-size their investments and focus on mission-critical topics.

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