

Bay
Bridge
Digital

Discover the future of retail:
innovations, sustainability, and
AI trends at the first edition of
NRF Europe 2025 in Paris.

BayBridgeDigital Report

NRF'25 RETAIL'S BIG SHOW
EUROPE
16 - 18 SEPTEMBER 2025 | PARIS



Executive Summary

The first European edition of Retail's Big Show took place in Paris from September 16 to 18, 2025, highlighting the sector's rapid and profound transformation. Over the course of three days, Paris became the global capital of retail innovation, bringing together more than 20,000 decision-makers, 480 exhibitors, and over 200 speakers to share insights, showcase innovation, and drive business forward. Three powerful convictions clearly emerged from the event:

1. **Data:** Data has become the new strategic asset. When unified, enriched, and activated in real time, it directly drives performance, from boosting average basket size by more than 20%, to lowering logistics costs by up to 15%, and unlocking new revenue streams through retail media.
2. **Artificial intelligence:** AI has moved from the experimental stage to industrialization. AI is now deployed at scale with measurable impact. It has been estimated that generative AI could create up to \$660 billion in annual value for the retail sector worldwide by 2030.
3. **The store:** Store is establishing itself as an omnichannel and responsible platform, at the heart of a seamless and measurable customer journey, where ESG is becoming as essential a KPI as profitability.

This NRF Europe conveyed a clear message: the future of European retail will rest on three imperatives: industrializing artificial intelligence (AI), embedding sustainability at the core of operations, and orchestrating truly seamless omnichannel journeys.

Subsequently, the retailers that succeed will be those able to translate these trends into tangible operational levers, moving swiftly from vision to execution and turning promises into measurable results.





Retail Trends at NRF EUROPE 2025

During NRF Europe 2025, it became clear that the retail sector is under pressure but on the move, caught between regulatory pressures, societal expectations, and technological innovations. Thus, retailers are transforming these challenges into competitive advantages.



Matthew Shay
NRF President & CEO

1- Artificial Intelligence

Artificial intelligence has become the refrain we all recognize , but this time, the melody is reshaping retail from end to end. No longer confined to pilots, AI now powers dynamic pricing, automated demand forecasting, and real-time fraud detection, going far beyond recommendations and inventory optimization.

The results are tangible: retailers are reporting 20% higher conversion, 15% fewer overstocks, and major gains in service responsiveness.

Generative AI's Projected Value in Global Retail by 2030

**660
Md\$**

According to studies, generative AI will create up to \$660 billion in annual value in global retail by 2030.

The real question for retailers is how to orchestrate deployment at scale, aligning data, processes, and customer touchpoints to unlock fast ROI.

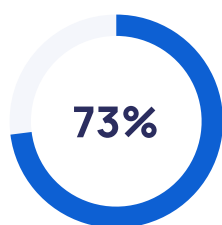




2- Omnichannel

Offering users a unified experience across all channels and touchpoints is becoming more of a prerequisite than a competitive advantage. Omnichannel retailing has become the norm; for example, Starbucks already generates 50% of its sales via mobile devices.

Customers demanding physical-digital consistency



According to Salesforce, 73% of customers expect a consistent experience between physical and digital.

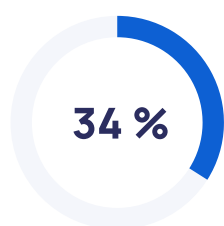
ACTION SEPHORA

Action and Sephora confirm that channel orchestration is as much a driver of customer loyalty as it is a lever for direct growth.

3- Data

Finally, data has now established itself as the strategic asset par excellence. Retailers have access to colossal volumes of information: transactions, customer interactions, digital journeys, supply chains, but only by unifying, enriching, and activating this data in real time can they transform this latent capital into tangible performance. Truly data-driven retailers are growing 2.5 times faster than their competitors.

Increased analytical efficiency with the adoption of the Lakehouse model



According to IDC, adopting the Lakehouse model improves analytical efficiency by 34%, confirming that data architecture is no longer a technical choice, but a direct determinant of competitiveness.

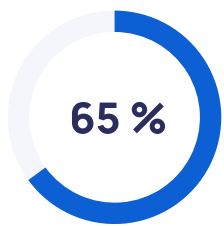




4- Sustainability

Sustainability is shifting from marketing to measurable action. With the CSRD directive set to impact over 50,000 European companies, retailers are accelerating circular initiatives and greener operations. Energy efficiency programs can reduce in-store energy use by up to 30%, while sustainable packaging cuts supply chain costs by nearly 20%. At the same time, consumers are increasingly favoring sustainable brands.

Percentage of Europeans who favor responsible brands



The figures speak for themselves: 65% of European consumers now favor brands that are perceived as responsible.

These four dynamics form a whole. Without data, there is no AI; without AI, there is no personalized omnichannel experience; without omnichannel, there is no visible ESG value for the customer. It is their interconnection, rather than their isolated existence, that will define the champions of European retail.





Exhibition Innovations

While trends set the direction, the innovations presented in Paris revealed the paths forward. NRF EUROPE 2025 showed that retail innovation no longer arises in silos, but rather from the convergence of startups, tech giants, and pioneering retailers.

Startup Hub

The Startup Hub was a real showcase for innovative solutions, highlighting the entrepreneurial dynamism of the retail sector.

We saw biometric payment solutions that reduce checkout times by 40%, AI recommendation systems that generate +18% conversions, and logistics platforms that reduce carbon emissions by 15%.



Innovators showcase

The Innovators Showcase was an exclusive exhibition of thirty innovative technology companies that are transforming retail in the European market. Organized by the NRF Innovation Advisory Committee, this invitation-only exhibition highlighted the latest technologies that are changing the way consumers shop and businesses operate.





Retail store Tours

Finally, Retail Store Tours were exclusive guided tours reserved for retailers, and designed to offer an immersive experience of Parisian retail concepts and innovations. Organized by Retail Store Tours, they allowed participants to explore iconic stores from a strategic perspective, going beyond simple architectural or commercial discovery. These tours were designed “by retailers for retailers” and covered three themed itineraries over the course of a day.



The birthplace of world-class innovation

Exploration of “la Rive gauche”, the cradle of French elegance and expertise, combining iconic houses and immersive innovation.



Grocery Innovation & Best Practices

Focus on the food and beauty sector in the Saint-Germain district: team training, store design, customer experience, and micro-clustering in dense urban environments.



Best practices on the iconic Champs-Élysées

Immersion of participants in the fusion of luxury, technology, and timeless style on Paris' most iconic avenue.





Examples of Innovations and Success Stories

Beyond technological showcases, the success stories of brands present in Paris have shown that innovation is already embodied in concrete strategies.

SEPHORA

Sephora, with 74 million loyal customers and more than 3,200 stores, has demonstrated how diversity, proximity, and digitalization can be combined. Its omnichannel model, supported by tools such as Modiface, proves that inclusivity can be both a social commitment and a driver of performance.

///ACTION

Action has confirmed that agility and rapid growth can coexist. By opening more stores while maintaining a flexible supply chain, the brand has proven that discount retail can go hand in hand with operational efficiency and innovation.

KÄRCHER

Kärcher has exemplified the transformation of a B2B2C brand by rethinking its customer experience with connected products and repositioning its teams as brand ambassadors.

Carrefour

Carrefour, has redefined the role of the store as a technological and ESG hub, integrating retail media, dynamic pricing, and environmental traceability.





Alongside these giants, other initiatives, from Startup Hub to Adyen to Retail Store Tours have confirmed the richness of the models explored: seamless payments, AI-enhanced merchandising, sustainable logistics, and immersive experiences.

These trajectories, as diverse as they may be, converge on the same conclusion: European retail is undergoing a multifaceted reinvention. The question is no longer whether these innovations will be adopted, but which ones will become the market standard.

Store Transformation Boosts Engagement

Retailers who view their stores as mere points of sale are missing out on a major strategic opportunity.

Those that transform their points of sale into community spaces, hosting workshops, events, or social gatherings, are seeing an increase in



+50% increase
in visit frequency.



These hybrid stores are becoming more than just retail spaces: they are transforming into platforms for social connection and customer loyalty, capable of anchoring the brand in consumers' daily lives. Far from cannibalizing e-commerce, they act as an accelerator for omnichannel journeys, reinforcing both perceived value and repeat purchases.





Strategic Insights for Retailers

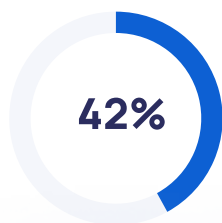
The NRF Paris 2025 discussions identified eight key lessons for European retail.

1- Rethink Again the Customer Experience

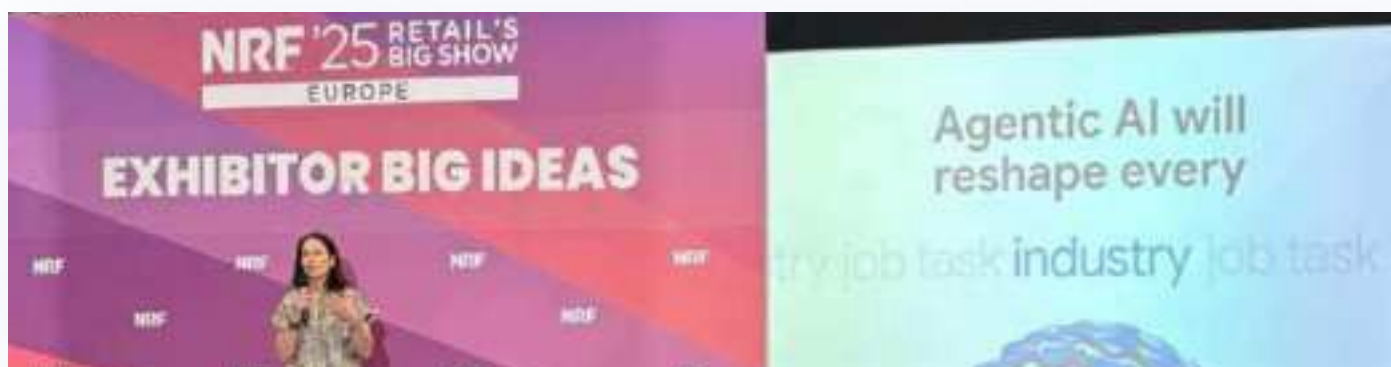
The store is becoming an omnichannel platform.

The point of sale is becoming the heart of the customer journey, rather than its conclusion. Integrated with digital channels, it generates an average of 20% more in average basket size and strengthens loyalty.

E-commerce orders placed through stores



Nearly 42% of e-commerce orders are processed through stores (click-and-collect, in-store returns, etc.).



Artificial Intelligence is scaling up. The next step is to adopt massively and industrialize it.

The employee experience becomes a direct lever.

Brands that equip their employees with the right powerful tools see an average NPS increase of 12 points. Bayretail has proven it: with over 90% adoption, its mobile-first clienteling tools transform the role of the salesperson into that of a trusted advisor. An augmented employee becomes a driver of loyalty and additional sales.

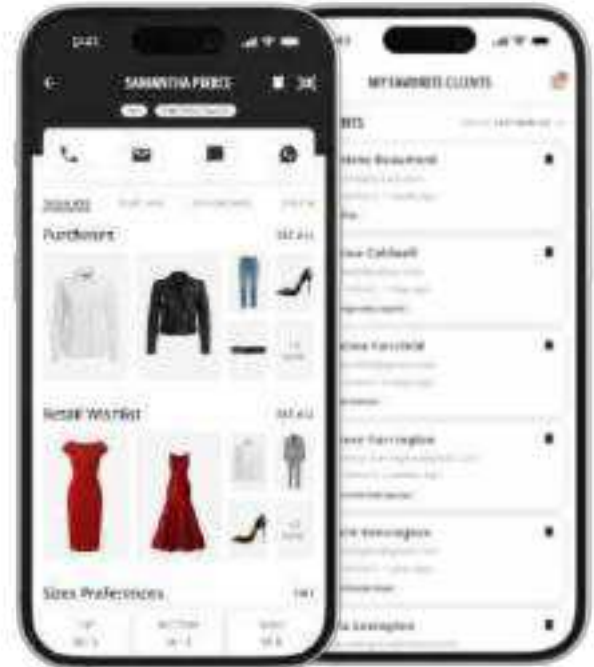




2. Transforming the economic model

Retail media is becoming a new P&L line

Retail media is transforming stores into data-driven ecosystems. By monetizing first-party data and turning physical spaces into measurable advertising platforms, retailers unlock a powerful new growth engine. Beyond additional revenue, it reshapes margins, diversifies business models, and positions retail as a central player in the media economy.



Agentic AI is redefining work at scale

Agentic AI is emerging as one of the most transformative forces in retail and beyond. By automating repetitive tasks and augmenting decision-making, it is reshaping every job function – from merchandising to supply chain, customer service, and marketing.



At NRF Europe 2025, discussions highlighted that the real shift lies not in replacing roles, but in redefining how value is created. Store associates gain real-time recommendations, supply chain teams benefit from predictive automation, and marketers can orchestrate hyper-personalized journeys at scale.

For retailers, Agentic AI is not just a technology trend – it is a structural evolution that redefines productivity, customer experience, and competitive advantage across the entire value chain.



3. Strengthen organization and technology

Organizational agility accelerates growth.

Retailers capable of rapidly launching new concepts grow 2.5 times faster than their peers. Action is a case in point: its ability to quickly replicate a successful discount model while maintaining a flexible supply chain enables it to outperform its more cumbersome competitors.

Ecosystems are becoming an essential catalyst.

Distributors who open up to strategic partnerships reduce their time-to-market by 30%. Retail innovation can no longer be achieved alone: startups, tech giants, and integrators such as BayBridgeDigital must work together to transform roadmaps into concrete projects.

Digital trust is now a business asset.

In the age of biometric payments, CDPs, and retail media, customer data has become critical. However, 21% of consumers say they have stopped buying from a brand after a data breach. Cybersecurity and transparency are no longer IT functions, but conditions for growth and customer loyalty.

These lessons form a coherent trajectory. The customer experience is expanding beyond purchasing to include personalization and trust. The economic model is reinventing itself thanks to new sources of revenue such as retail media and ESG, which has become a standard for competitiveness. Finally, the organization is structured around agility and ecosystems, with data and AI as its foundations.

The future of European retail will not be determined by the ad hoc adoption of these levers, but by their articulation and industrialization. The brands that are able to move quickly from vision to execution will set the standards by 2027. Together, these insights paint a clear roadmap: orchestrate data, AI, omnichannel, ESG, and digital trust to transform trends into competitive standards.

Salesforce Agentforce for Retail

The success of modern retail depends on the ability to transform data into actionable value. Salesforce has established itself as the platform capable of unifying, orchestrating, and enhancing the customer experience through AI.

With Data Cloud, retailers have access to a 360° view of their customers that can be activated in real time.

Revenue Cloud enables the industrialization of recurring revenue, reducing IT costs by 40% and increasing recurring revenue by 18%.

Marketing Cloud and Commerce Cloud orchestrate online and offline journeys, generating a 20% increase in average basket size and a 12% decrease in returns.

Tableau and Slack strengthen data governance, reducing decision cycles by 24%.





But the most notable new feature remains Agentforce, which introduces agentic AI into retail operations.



Augmented Sales Assistant in-store

Boost productivity and personalization:

- Real-time recommendations based on purchase history and inventory availability.
- Intelligent cross-sell/upsell during customer interactions.
- Proactive management of out-of-stock items (suggestion of alternatives or ordering options).



Omnichannel Customer Service Agent

Streamlines support while reducing costs:

- Respond independently to frequently asked questions (returns, product availability, order status).
- Manage simple refunds or exchanges without human intervention.
- Escalate only complex cases to a human advisor.



Logistics and Supply Chain Agent

Optimize the supply chain:

- Monitor inventory levels in real time and automatically trigger replenishment
- Anticipate the risk of stockouts or overstocking using predictive models
- Propose dynamic pricing adjustments based on demand and logistics costs.



Retail Media & Merchandising AI Agent

Maximize monetization of first-party and linear data:

- Automatically create hyper-precise advertising segments in Marketing Cloud
- Generate and distribute personalized content based on customer behavior in-store and online
- Help merchandising teams test new assortments with ROI simulation

These specialized agents transform AI into a concrete driver of productivity (+23%) and customer satisfaction. Beyond its historical role as a CRM, Salesforce is establishing itself as a key infrastructure for unifying data, industrializing AI, and orchestrating customer journeys in an omnichannel approach.



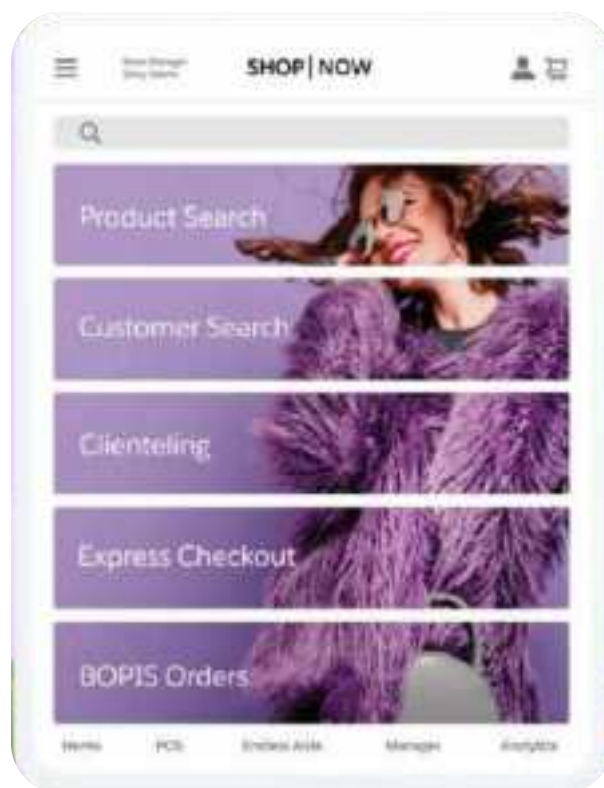


Retail Cloud x Bayretail: the Perfect Match for Augmented Retail

In a context where physical stores must prove their value in the face of digital competition, one thing is clear: they cannot fulfill this central role without a solid technological foundation and tools designed for their teams. The combination of Salesforce Retail Cloud

Salesforce Retail Cloud forms the operational backbone. Thanks to its Modern POS, a true convergence point between digital intelligence and store execution, retailers can unify inventory management, omnichannel order processing, and real-time catalog visibility.

Native integration of an Order Management System eliminates the complexity of third-party tools, while Salesforce's advanced analytics provide a clear view of profitability and ROI. Invisible to the end customer, this foundation ensures smooth customer journeys and operational performance, while paving the way for omnichannel experiences.





Bayretail extends this power to the field.

Designed with a mobile-first approach and natively integrated with Salesforce, the solution transforms every salesperson into a true augmented advisor. Thanks to a 360° customer view enriched in real time: +190% data capture, intelligent clienteling tools.

The All-In-One Clienteling Solution



Sales Associate Empowerment:

Enables smart segmentation and customer portfolio management, assigning associates to high-value clients for 1:1 experiences.



Direct Customer Communication:

Includes integrated messaging for tailored outreach via email or SMS, supporting post-visit engagement and relationship-building.



Customization & Flexibility:

Offers a modular and adaptable interface, easily configurable to different retail formats, geographies, and use cases.



360° Customer View:

Natively integrated with Salesforce Service Cloud, providing rich insights including purchase history, loyalty level, and communication history.



Till Management:

Supports assisted sales while simplifying payment processes and fiscal compliance at checkout.



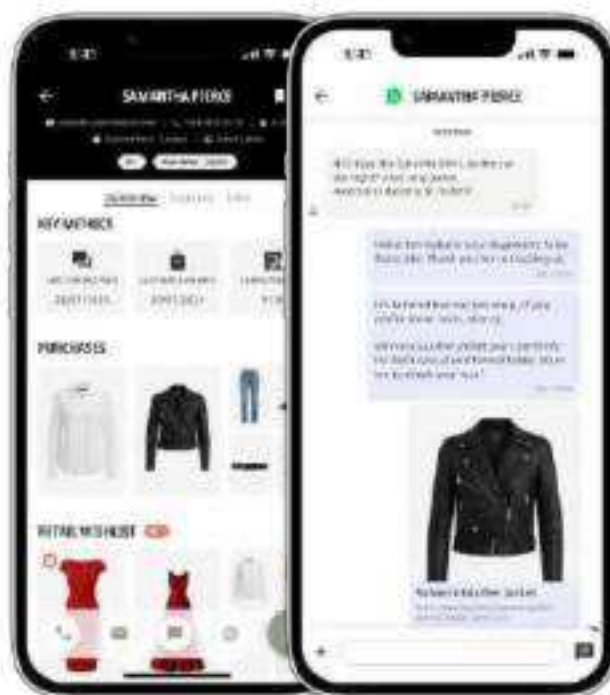
Customer Data Collection:

Facilitates live data capture through associate interactions. Enriching profiles in real time with preferences, behaviors, and feedback.



Appointment Management:

Powered by Booxi, Bayretail enables seamless booking, calendar coordination, and personalized service scheduling.





The results are measurable and consistent:



Evolution of ATV

+30% average transaction value thanks to contextual recommendations.



Growth in Loyalty

+20% growth in repeat purchases, strengthening loyalty.



Evolution of ROI

+67% increase in cross-sell campaign success rates.



Rate of Adoption

+90% adoption rate among salespeople, ensuring project sustainability.

The power of integration : combining Salesforce Retail Cloud and Bayretail

Complementary Strengths

- **Data Harmony:** Salesforce Retail Cloud centralizes operational data, while Bayretail enriches it with real-time, customer-specific insights from the store floor, enabling a holistic view of every client journey.
- **Operational Efficiency:** While Retail Cloud manages omnichannel logistics, stock, and automation, Bayretail empowers associates to take immediate action based on that intelligence, improving speed, satisfaction, and outcomes.
- **Scalability with Flexibility:** Retail Cloud ensures centralized governance, security, and performance at scale. Bayretail brings store-level customization and agility, essential for adapting to local needs and brand-specific strategies.



Retail Cloud



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Together, these two solutions create a model where operational efficiency and customer personalization do not conflict but reinforce each other.





Unified Data, Intelligent Retail with Databricks

Databricks provides the foundation with its Lakehouse model, unifying data lakes and warehouses to centralize transactions, customer data, and logistics flows.

Real-time processing is now possible.

For example, a retailer can analyze point-of-sale transactions, online browsing behavior, and supply chain data in a single environment, detecting out-of-stock risks instantly and triggering automated replenishment before shelves run empty



Databricks, with its lakehouse architecture, unifies transactions, customer data, and logistics flows in a single environment, enabling real-time analytics and predictive insights. Coupled with Agentforce, Salesforce's AI-driven platform, these capabilities move beyond pilots to deliver autonomous agents that optimize merchandising, streamline supply chains, and personalize customer engagement at scale. Together, they illustrate how data and AI are no longer isolated initiatives but interconnected levers reshaping every layer of retail operations.





Outlook for the future

3 Keys takeaways from this trade show

1. AI at Scale

Generative AI has moved from pilots to core strategy, delivering measurable impact across customer engagement, supply chains and operations.

2. Retail Media Reinvented

Retail media is no longer experimental, it is emerging as a \$160B market by 2027, reshaping how retailers monetize data and reinvent their P&L.

3. Omnichannel Reinvented

The store is becoming the centerpiece of seamless journeys, merging physical and digital, while doubling as a community hub and ESG showcase.

Added to this are emerging signals, immersive experiences, enhanced cybersecurity, and the rise of data ecosystems, which are already redefining standards.

The question is no longer how to identify these trends, but how to measure their speed of industrialization. The brands that will succeed are those capable of combining speed, rigorous execution, and organizational alignment.





About BayBridgeDigital

BayBridgeDigital is an Agentic Powerhouse, transforming how enterprises operate, decide, and grow. Headquartered in New York with offices across Europe, the Middle East, and Africa, we combine AI strategy, Salesforce Data Cloud, and enterprise-ready AI agents to help the world's leading companies unlock intelligence, automation, and human creativity at scale.

We help enterprises accelerate their digital transformation by combining Salesforce expertise with the power of AI-driven agents.

BayBridgeDigital has been recognized for the fourth consecutive year as one of America's fastest-growing companies privately held and is included in the 2024 Inc. 5000 ranking....



Bayretail™
LEADING THE FUTURE OF RETAIL

About Bayretail

Bayretail is a mobile application provider, natively built on Salesforce, focused on empowering associates in retail stores. Bayretail solutions help retailers blend in-store and online channels to deliver seamless shopping experiences.

Bayretail mission is to harness the power of the world's most advanced mobile technology to deliver simple-to-use apps for store associates to look up products, manage customer information, check out shoppers, and communicate with clients. Leading retailers like Lanvin, Fast Retailing, IRO Paris, Puig, Byredo, Agnès b use Bayretail to elevate the shopping experience, increase sales and improve customer service.

The Bayretail StoreApp for Salesforce is now available on the Alibaba Cloud Marketplace, offering tailored and compliant solutions for retailers in mainland China.

For more information, visit: <https://bayretail.io/>

