Retail CITIES

European Retail This Week

One change in European retail that matters to FMCG commercial leaders.

EDITION #3
2 SEPTEMBER 2026

GAMING UPGRADE
Kaufland Marketplace France
High-end PCs. Bundled services. Free delivery.

VIRAL FINDS
TikTok Shop
Live, social, and shoppable. Rewards unlocked.

SMARTER SPENDING
Temu
Gamified rewards. Great value. Every time.

STYLE ON THE GO
SHEIN
Fashion that fits your life. Delivered fast.

Next Generation eCommerce in Europe

Welcome to European Retail This Week (ERTW). Each week I look at one change in European retail that matters to FMCG commercial leaders. If you are new to my research, I have included a short appendix highlighting two topics from August – Lidl Plus & The Power of Rotation – as well as several perennial all-star research pieces from the archive.

What Will Happen in Q4-2026 with eCommerce in Europe?

Let's start with a polarizing statistic: At Kaufland's e-Commerce day in July 2026, the stat that was shared was Kaufland Marketplace GMV growth of 11.9% in Germany, 124% International.

This polarizes in two directions.

- Direction 1: 12% growth for an established hypermarket in an established market – Germany – is cause for either celebration, if you like el-Commerce, or fear, if you prefer to have profitable instore operations.
- Direction 2: 124% GMV growth for a marketplace – in countries where it never operated in the past, France, Austria, Italy – is stunning, unless you are talking about a Chinese-marketplace platform such as TikTok, Joybuy, Temu, Shein.

Let's do a reality check, however, for just a moment. What categories of goods does Kaufland say matter most to its fast-growth e-marketplace?

Kaufland made the answer clear: Sales of Desktop PCs were up 60%, laptops 32%, mobile phones up 30%.

An astute observer might recognize what I'm about to say next before I say it: Kaufland has never sold a lot of electronics, particularly not high-end electronics, in their physical stores.

So, the next question is the important one: Who is buying desktop PCs these days and why are they picking Kaufland Marketplace as their vendor of choice?

The answer is obvious: Gamers are buying desktop PCs and if you filter PCs over EUR3k on Kaufland Marketplace France, you see the appeal. Kaufland is working with specialized PC makers to bundle services and offer free delivery.

Implications for 2027 Planning

The Retail Cities' team has been busy crunching statements from leading retail executives and we have come to a singular conclusion: Q4 2026 will be highly promotional – but not just "buy this and get 30% off." The promotions will increasingly be gamified, bundled, and will reward digitally-obsessed consumers better than those who check their loyalty app once a week.

The winners will clearly be:

- Kaufland Marketplace, especially as a disruptor to established electronics chains in Western Europe, especially France, Italy, and Austria
- TikTok, especially as a disruptor to cosmetics and fast fashion, across all markets
- Temu, using its gamified approach to elevating small businesses, in lower priced consumables segments, especially with Gen Y and younger

What is unclear is whether the established operators in these spaces – Amazon, Shein, Ebay, Tesco, Carrefour, Argos/Sainsburys, MediaMarkt, Sephora, DM, Rossmann, Mueller – will adapt to match or concede some ground.

The majority of senior commercial leaders in FMCG companies will conclude something simple: This is all just noise – this does not change the ways softdrinks, soaps, protein supplements are sold. In fact, we are talking about a relatively small cohort: Gamers who spend EUR4k on a new gaming system.

There are two problems with that conclusion:

1. We believe these retailers are now capable, or will soon be capable, of bundling the EUR4k gaming systems with other products such as softdrinks, soaps, and protein supplements
2. The number of these operators is multiplying, and when they grow they find categories and cohorts that are easy to accelerate – eventually reaching consumers that buy a lot of softdrinks, soaps, and protein supplements

That leads me to our final Q4-2026 warning. The number one question we have been getting on this topic is when will JD.com launch JoyBuy for real and will they get approval to take over Ceconomy (MediaMarkt/Saturn)?

If that's still your number one fear for Q4-2026, please go back to the top of today's piece and read it again.

The team @RetailCities wishes you the best of luck managing Q4-2026 channel strategies this week.

I would be willing to bet that the Instacart test & learns have taught both Aldi and Morrisons a few things about rotation. If you believe that everyone follows the leader, like I do, you will also realize that the gap between the retailers that do it best and the rest is closing quickly now that the age of leaflets is well and truly in the rear-view mirror.

As the shift from summer to autumn grows profound, there's never been a better time than now to ask whether you're fully aligned to manage rotation in the coming rotation cycles → Back-to-School → Autumn → Halloween → Black Friday → Christmas/New Year's.

About European Retail This Week

European Retail This Week has been running on LinkedIn since 2013. The work summarizes research that I, Ray Gaul, participate in or lead. The stories are shaped by real conversations with Europe's commercial leaders and the questions they are asking. We keep individual identities anonymous and publish the research at a high level.

Ray Gaul

All-Star Archive – Start Here

- **Lidl Plus – August 2026:** A look at the four big changes taking place on Europe's most downloaded grocery app. Read more →
- **The Power of Rotation – August 2026:** How apps are changing the economics of retail rotation – and what that means for FMCG. Read more →
- **Hungary and the Future of Retail in Europe – August 2026:** What Hungary's inflation and energy pressures tell us about localization, retailer economics, and supplier strategy. Read more →
- **European Customer Consolidation in 2026 – July 2026:** The reality behind the headlines – and the implication for sales teams. Read more →

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