



2026 Global Retail Budget Planner

August 2025

This Global Budget Planner is designed to give you 15 slides to help overcome key challenges when planning for the future

Key challenges:

- **Market Fragmentation** - Each market has unique characteristics, growth rates, and channel dynamics, making unified strategic planning difficult.
- **Data Inconsistency** - Disparate data sources create comparison problem, preventing accurate prioritization.
- **Channel Complexity** - The evolving ecommerce ecosystem (pureplay, omnichannel, quick commerce, social, eB2B) requires granular understanding of which channels matter most for specific categories.
- **Resource Allocation Challenges** - Without comparable market sizing data, brands struggle to justify investment decisions and optimize resource allocation.
- **Future Uncertainty** - Brands lack reliable forecasting to anticipate shifts in channel dynamics and retailer importance, creating strategic blindspots.

Need this **customized** for your **category, retailers, and markets?**

Flywheel can be your **one global source of truth** for category opportunity planning.

Reach out to your Flywheel partners or [connect via email:](mailto:client.services@flywheeldigital.com)
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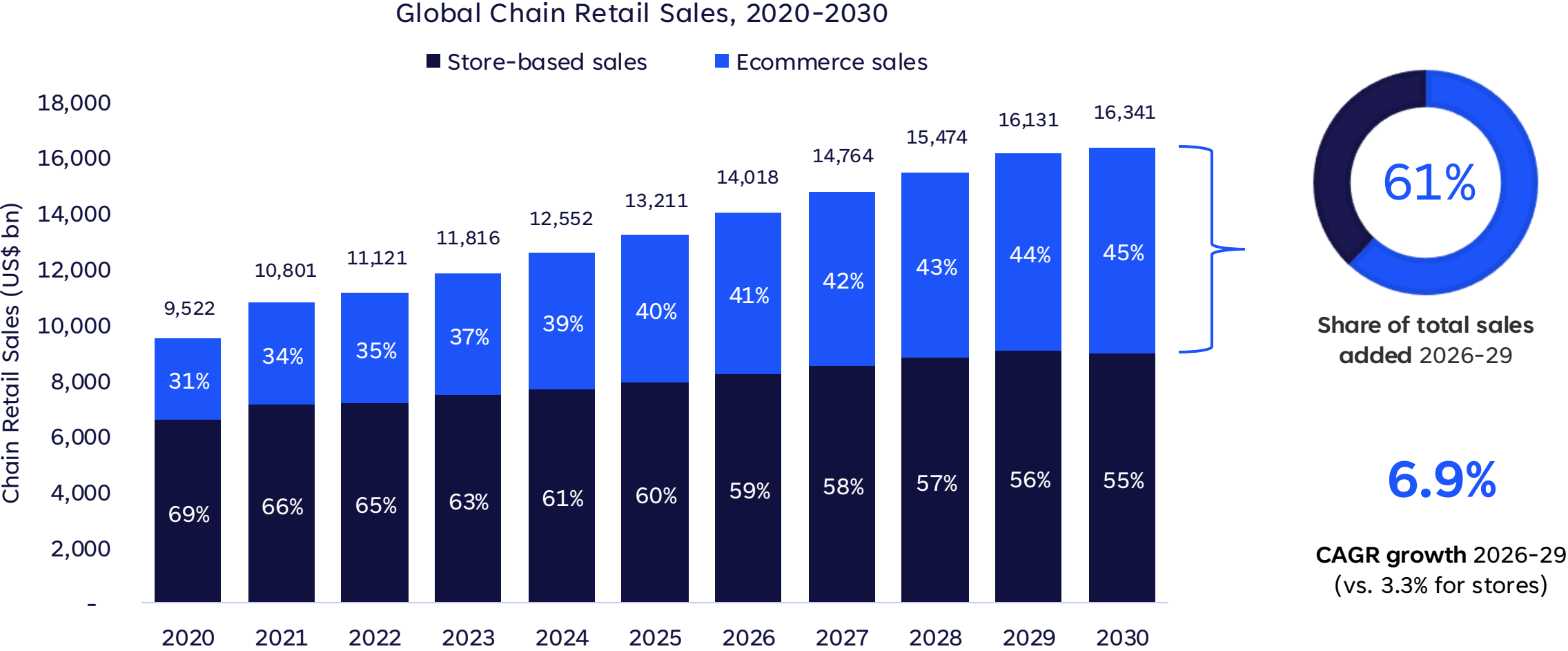
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can support your
business*



Global



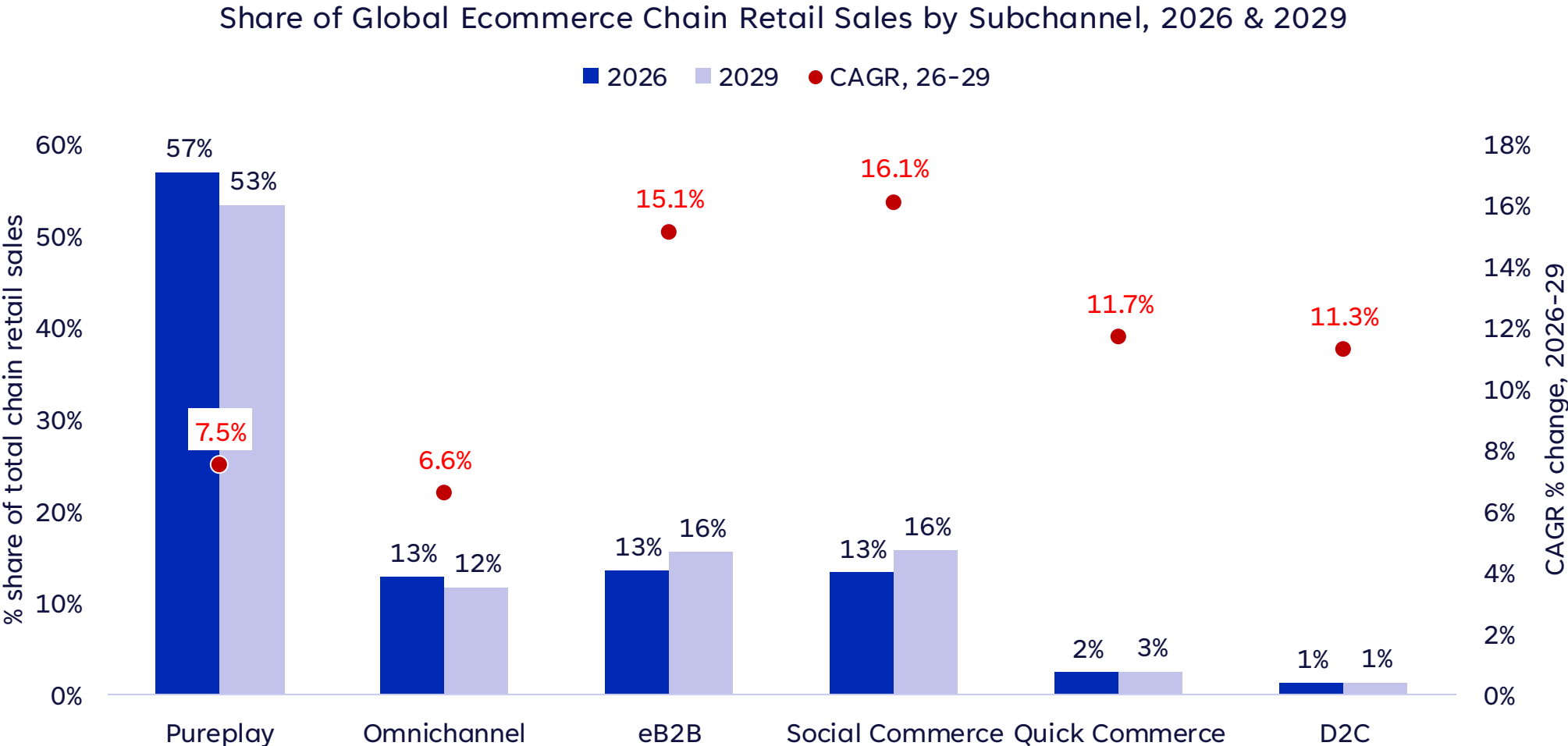
Global chain retail will grow 6% in 2026, adding \$800 billion –with ecommerce accounting for 61% of growth



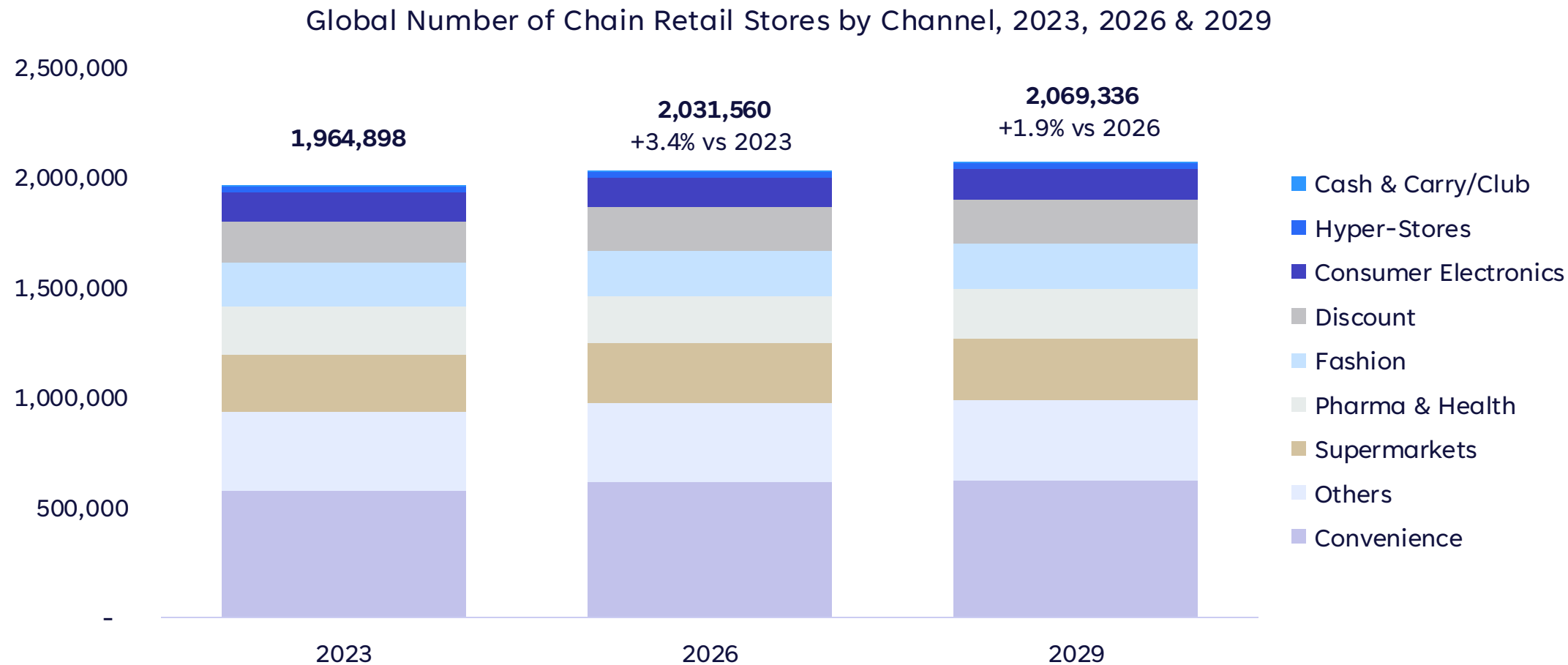
Ecommerce will continue to grow x2 faster than store-based sales



Pureplay is the largest ecom channel but will lose share to smaller, faster growing subchannels



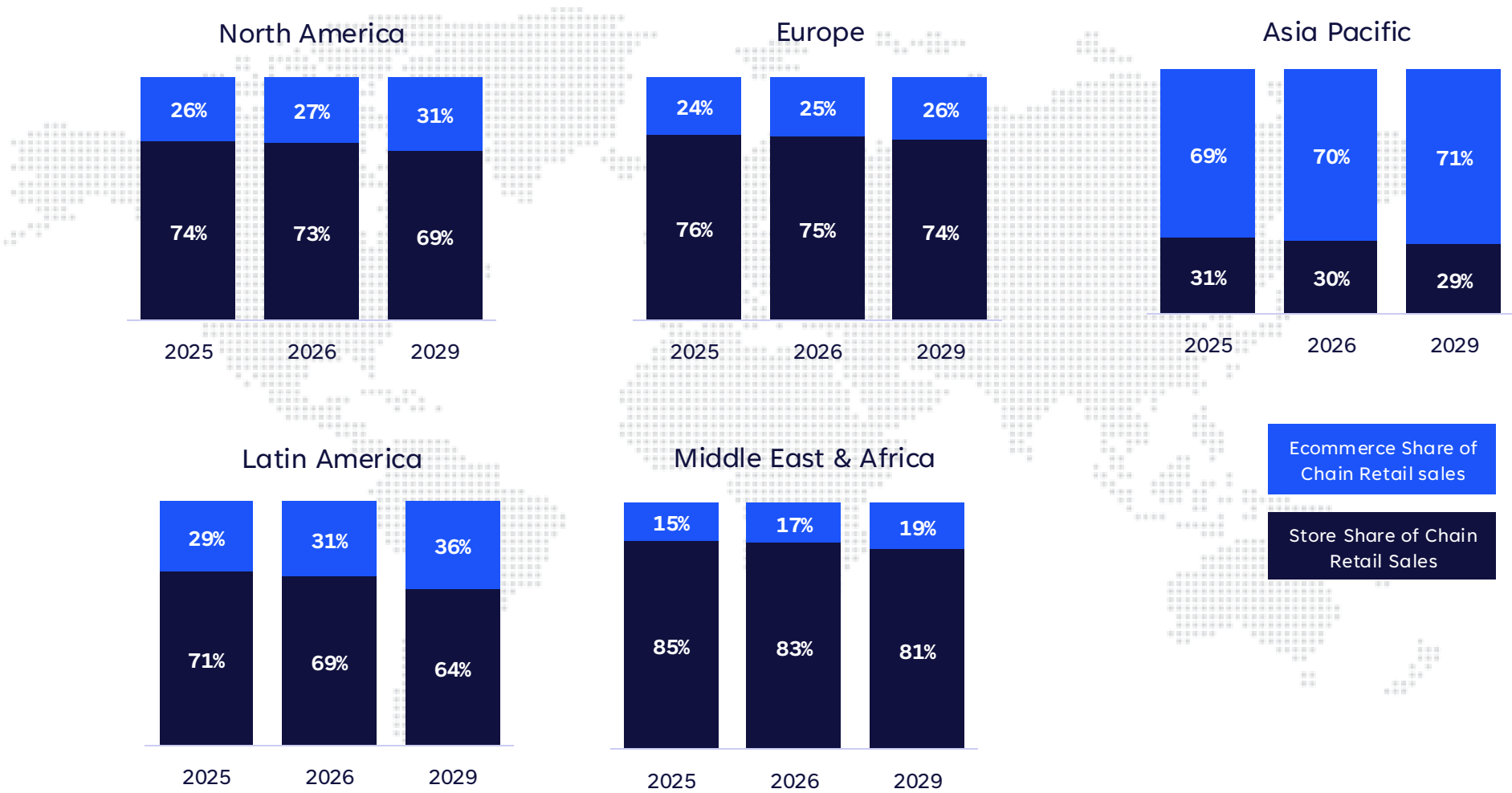
Despite the growth of ecommerce, the number of physical stores still increasing globally driven by small format



Regional



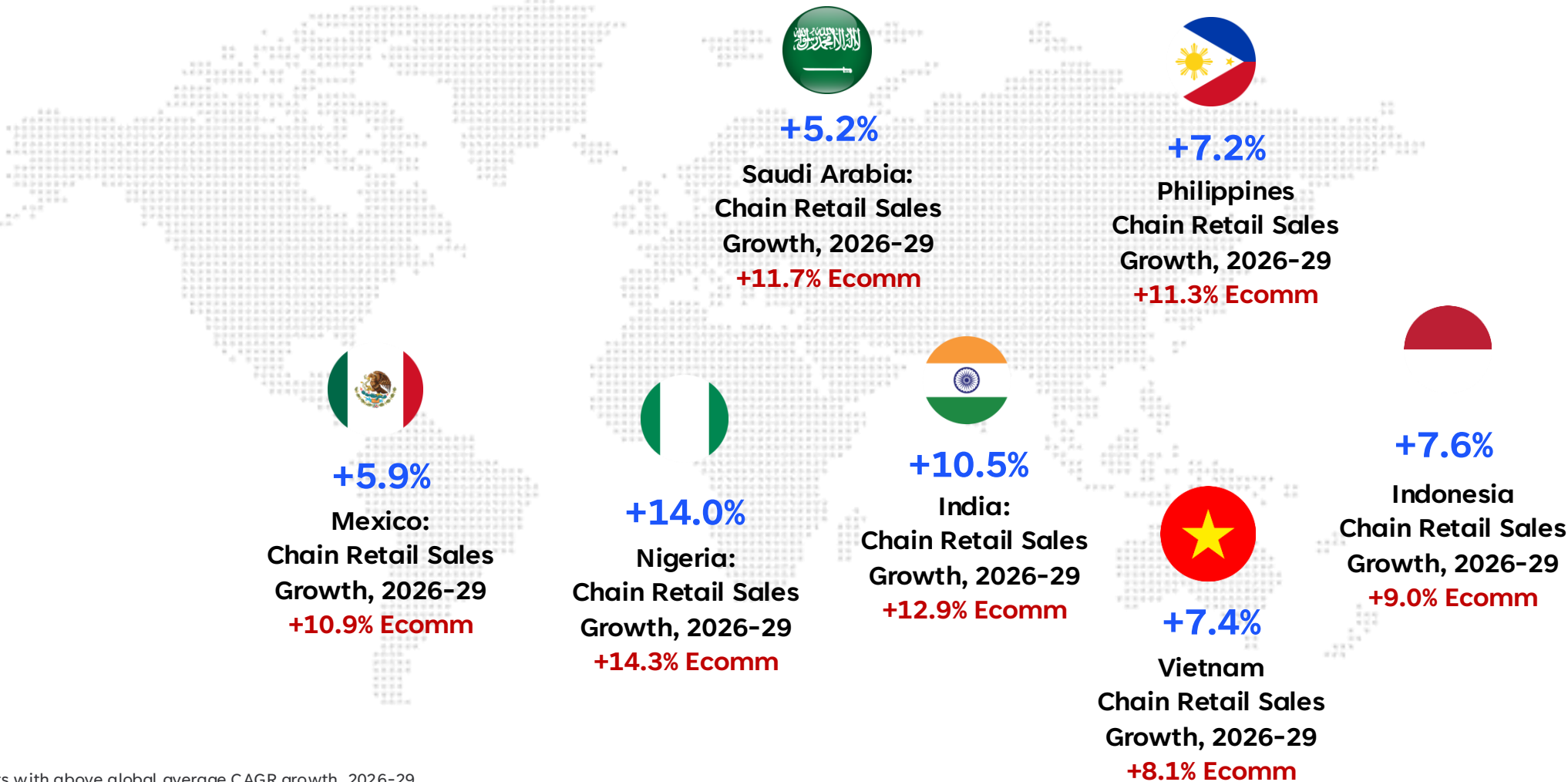
Ecommerce will drive future growth in all regions



Top 10 largest markets will account for 74% of all additional Chain Retail Sales added globally, 2026-29



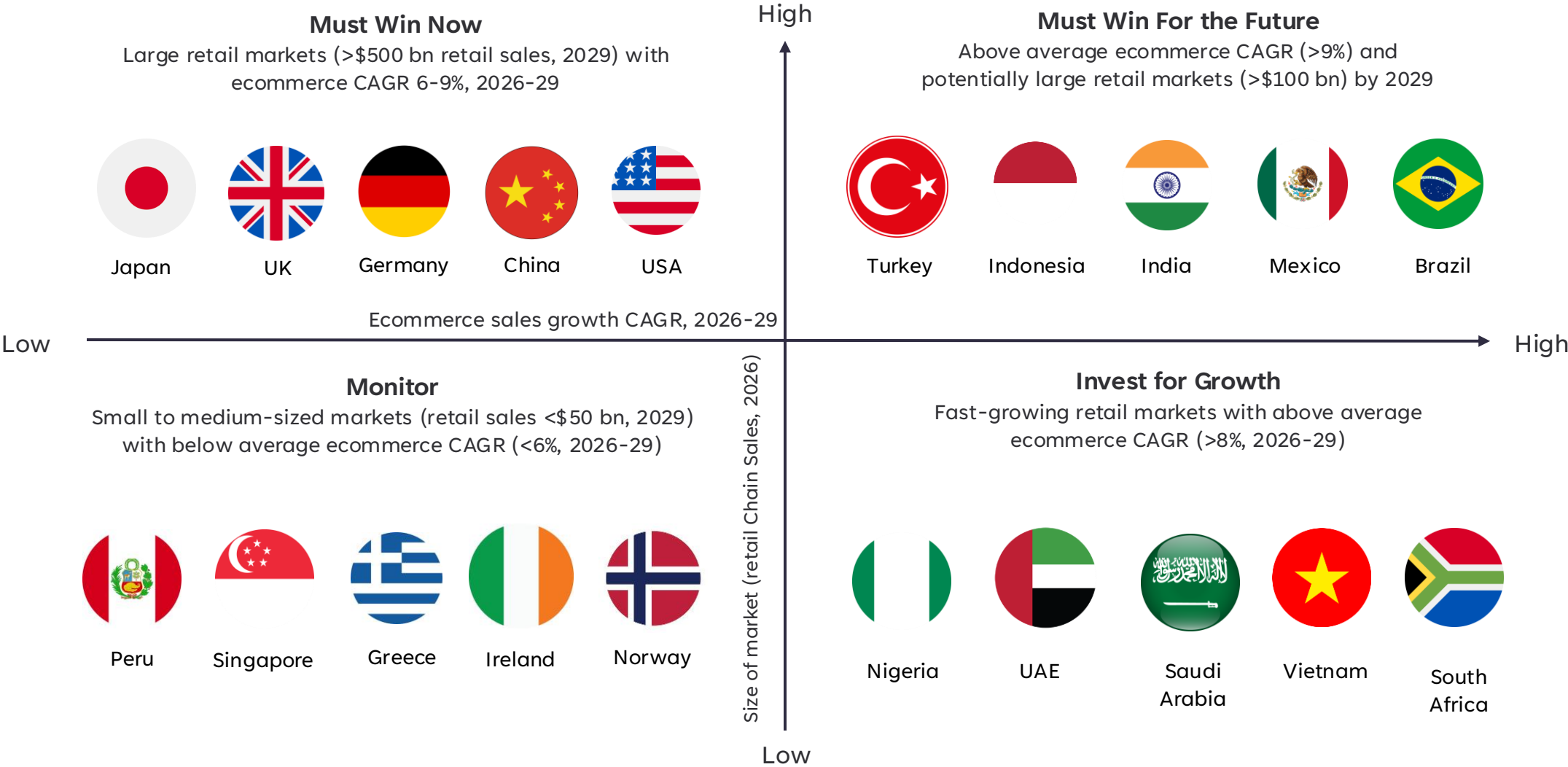
Look beyond the Top 10 for the fastest growing markets – where ecommerce is a major driver



Selected markets with above global average CAGR growth, 2026-29
Source: Flywheel Retail Insights, data sourced August 2025. Please note variations may occur after this point



Important to prioritize based on present and future opportunities



Note: Selected markets only
Source: Flywheel Retail Insights, data sourced August 2025. Please note variations may occur after this point

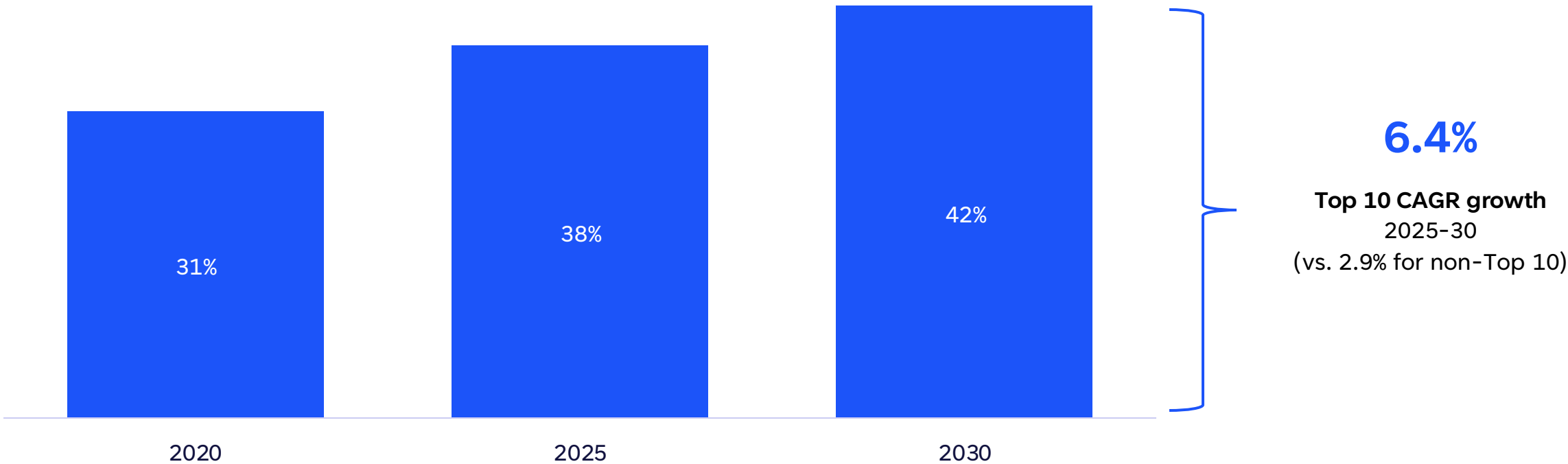


Retailers

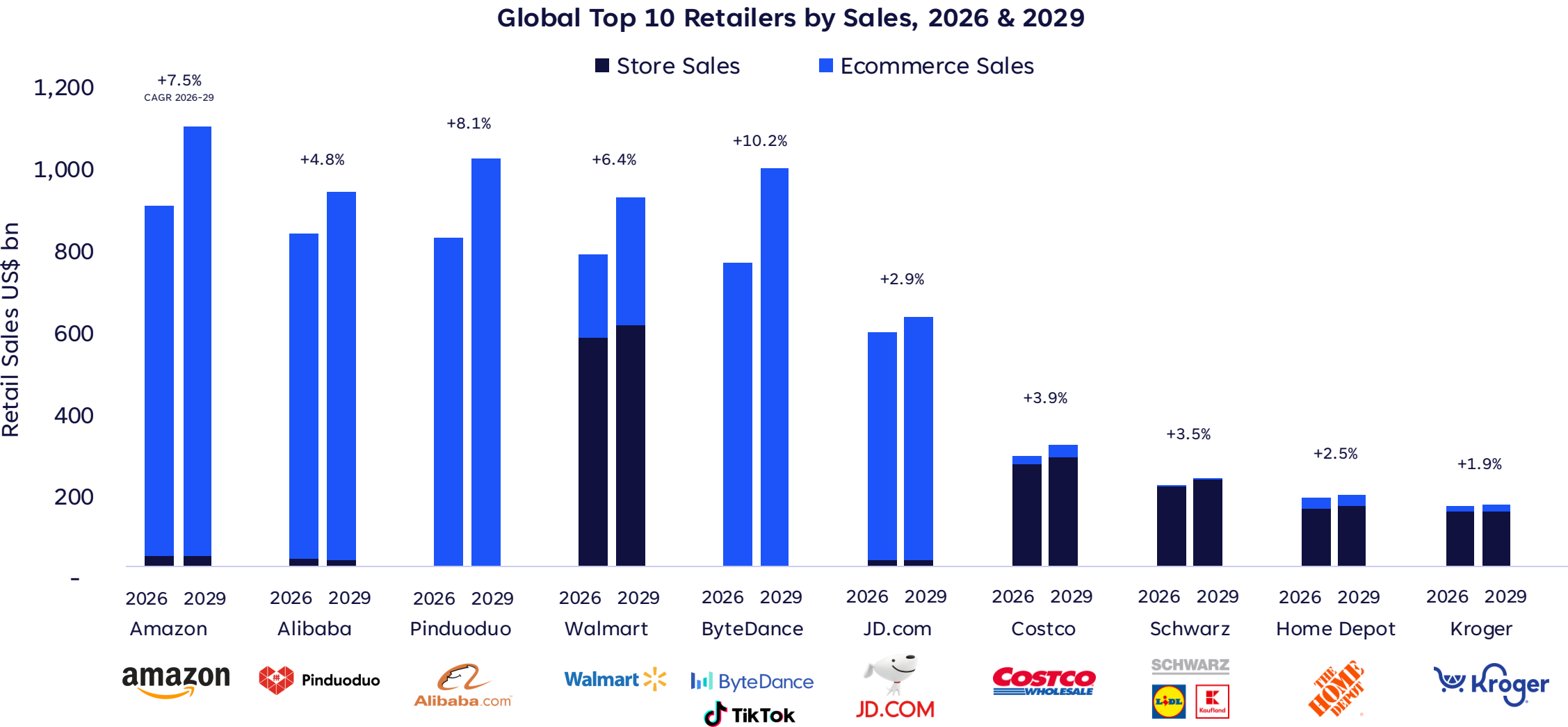


The big keep getting bigger → Top 10 retailers continue to consolidate global retail

Share of Global Chain Retail Sales held by Top 10 largest retailers,
2020, 2025 & 2030



Half of the world's Top 10 largest retailers are digital first



The Top 10 will account for 52% of all sales added between 2026-29

Global: Additional Chain Retail Sales by Retailer, 2026-2029 (US\$ bn)



USA

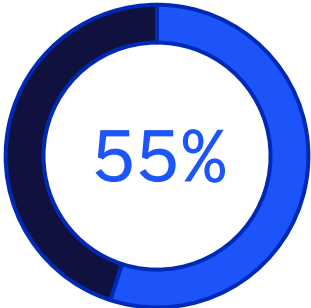
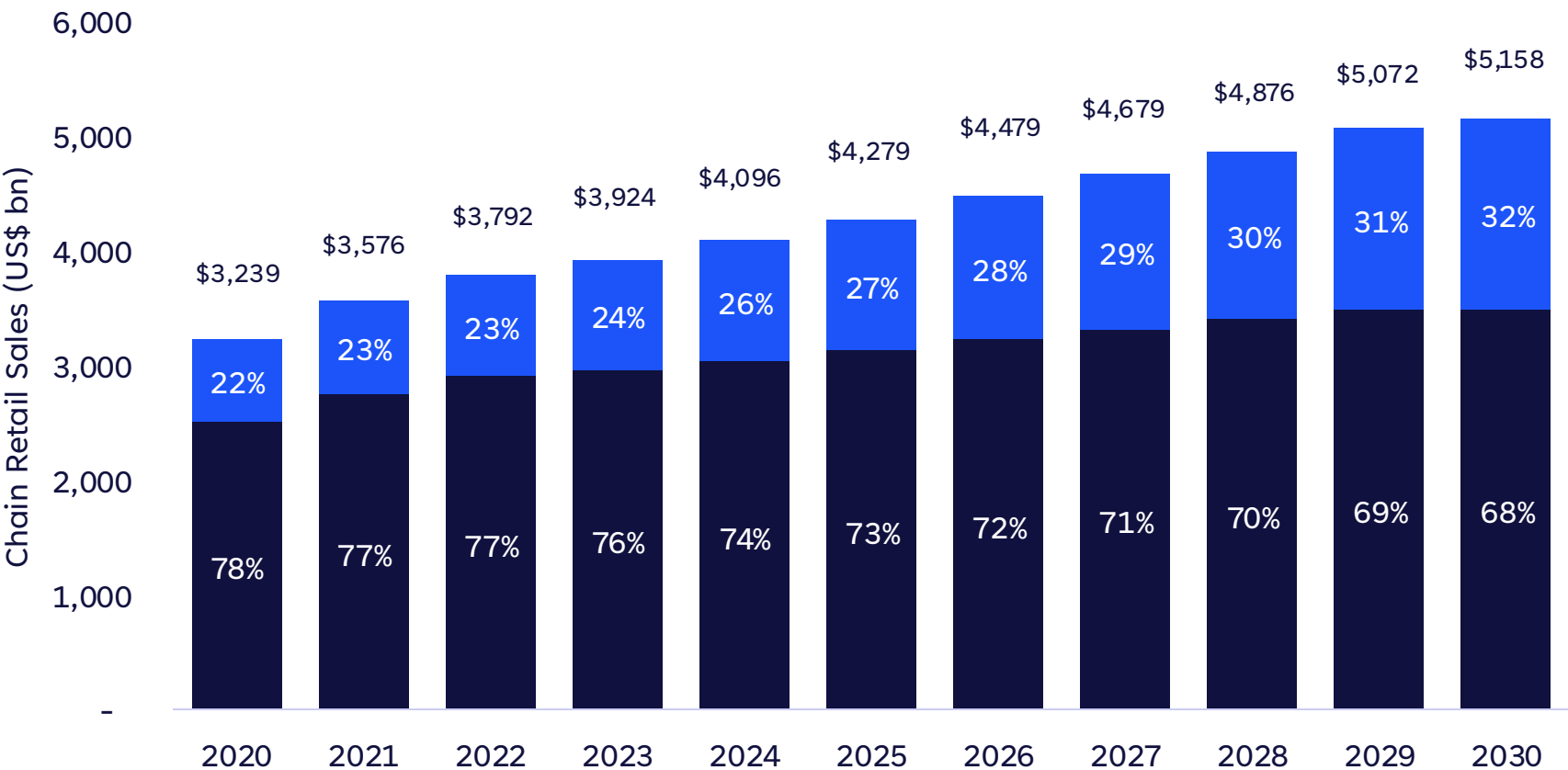




US chain retail will grow 4.7% in 2026, adding \$200 billion –with ecommerce accounting for 55% of growth

USA: Chain Retail Sales, 2020-2030

■ Store-based sales ■ Ecommerce sales



Share of total sales added 2026-29

8.1%

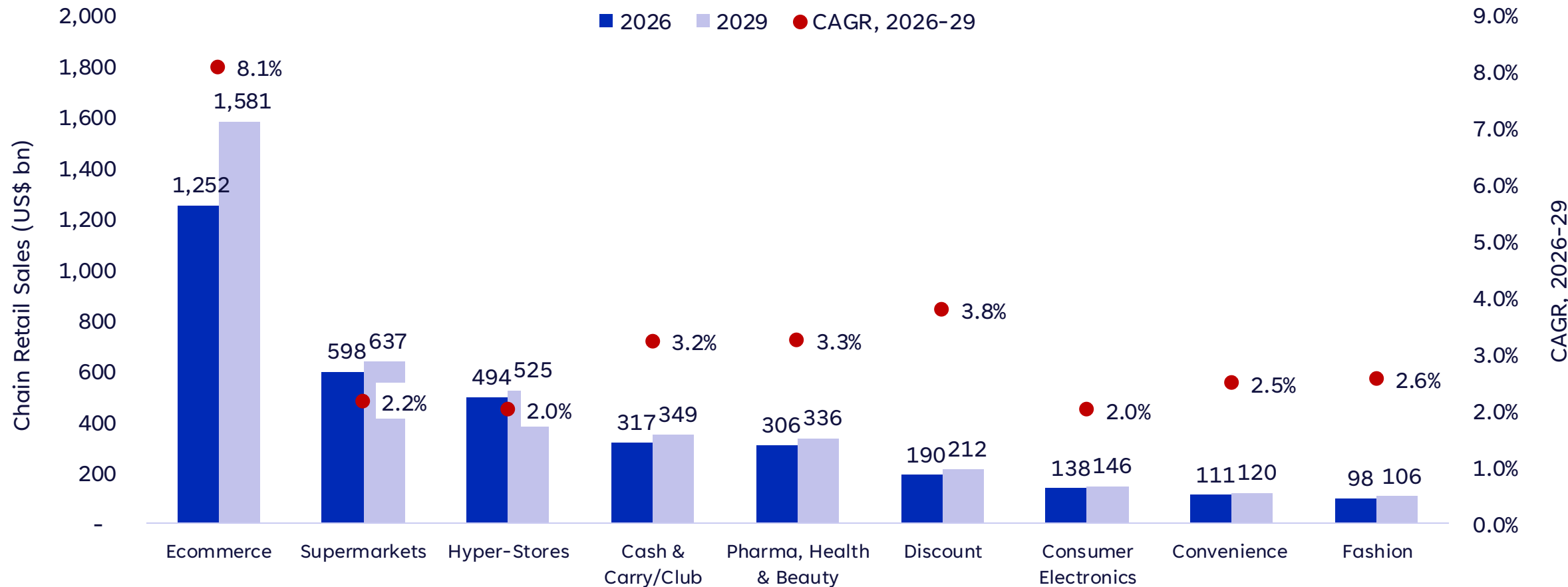
CAGR growth 2026-29
(vs. 2.7% for stores)





Ecommerce will grow twice as fast as physical store channels

USA: Chain Retail Sales by Selected Channels, 2026-2029



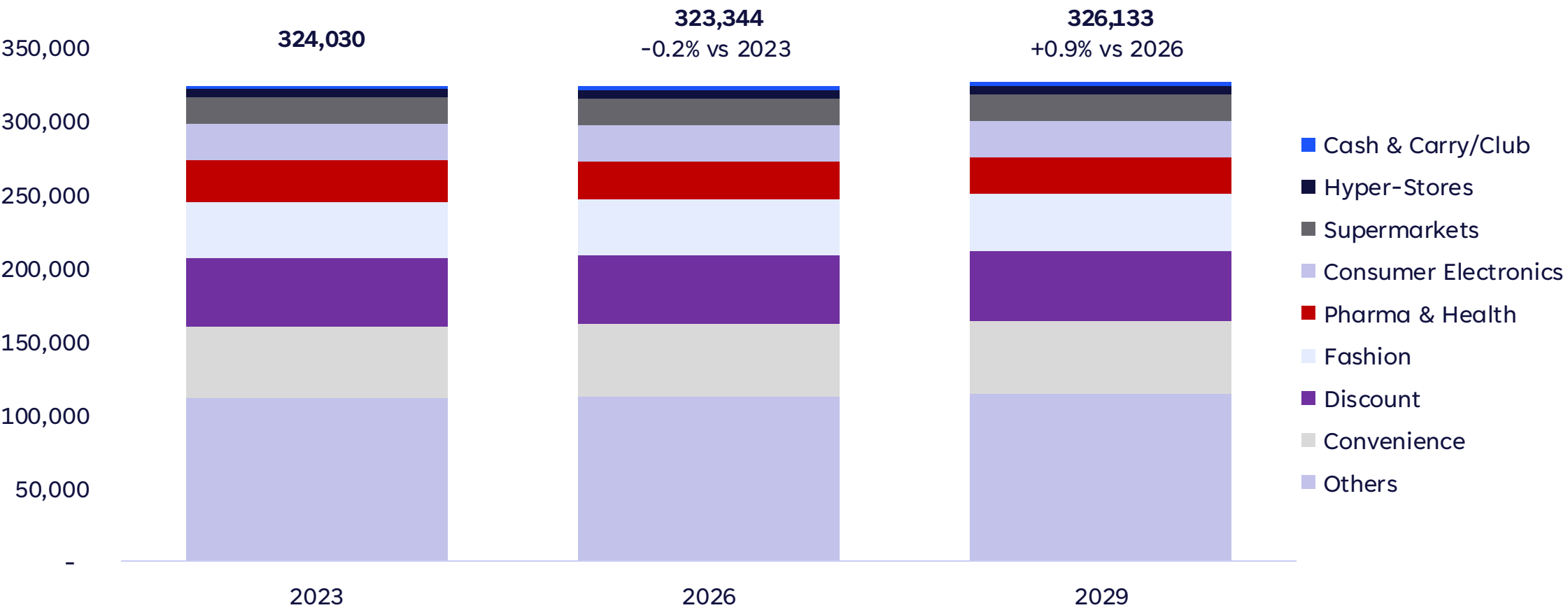
Note: Chain Retail Sales for all non-ecommerce channels relate to store-based sales only.
Source: Flywheel Retail Insights, data sourced August 2025. Please note variations may occur after this point



Physical store openings increasing again for first time in a decade



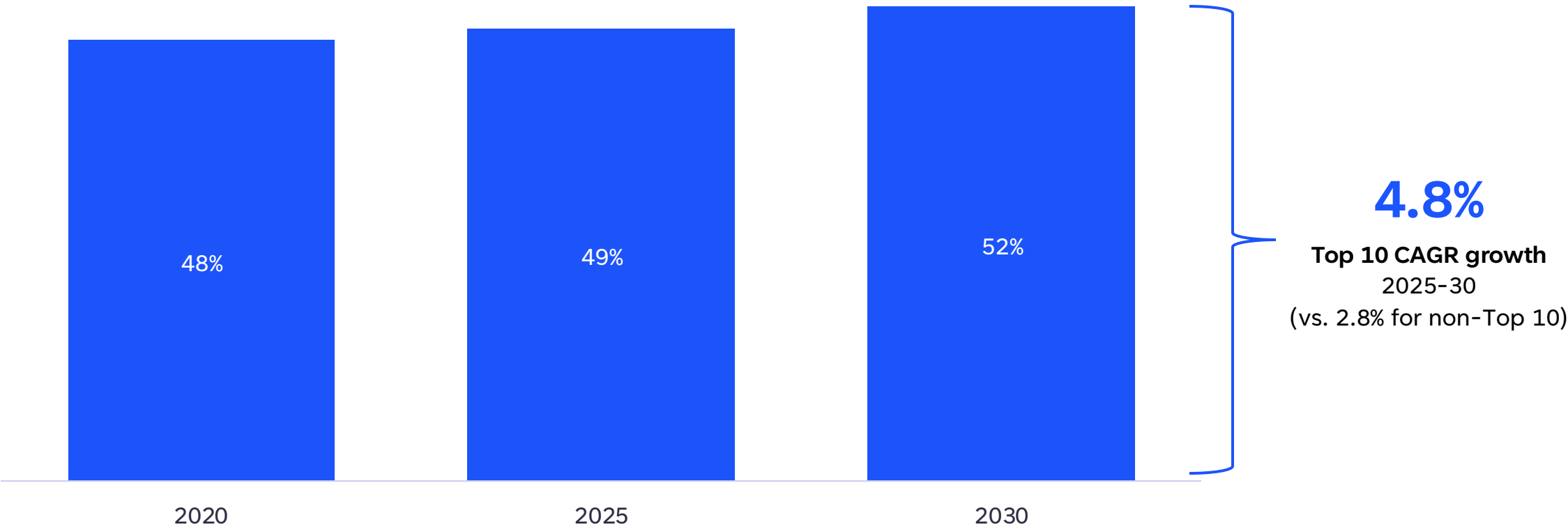
USA: Number of Chain Retail Stores by Channel, 2023, 2026 & 2029





The top 10 will account for over half of all chain retail sales and >60% of growth

Share of USA Chain Retail Sales held by Top 10 largest retailers, 2020, 2025 & 2030



While still small share for most, ecommerce driving ~50% of growth for top omnichannel retailers



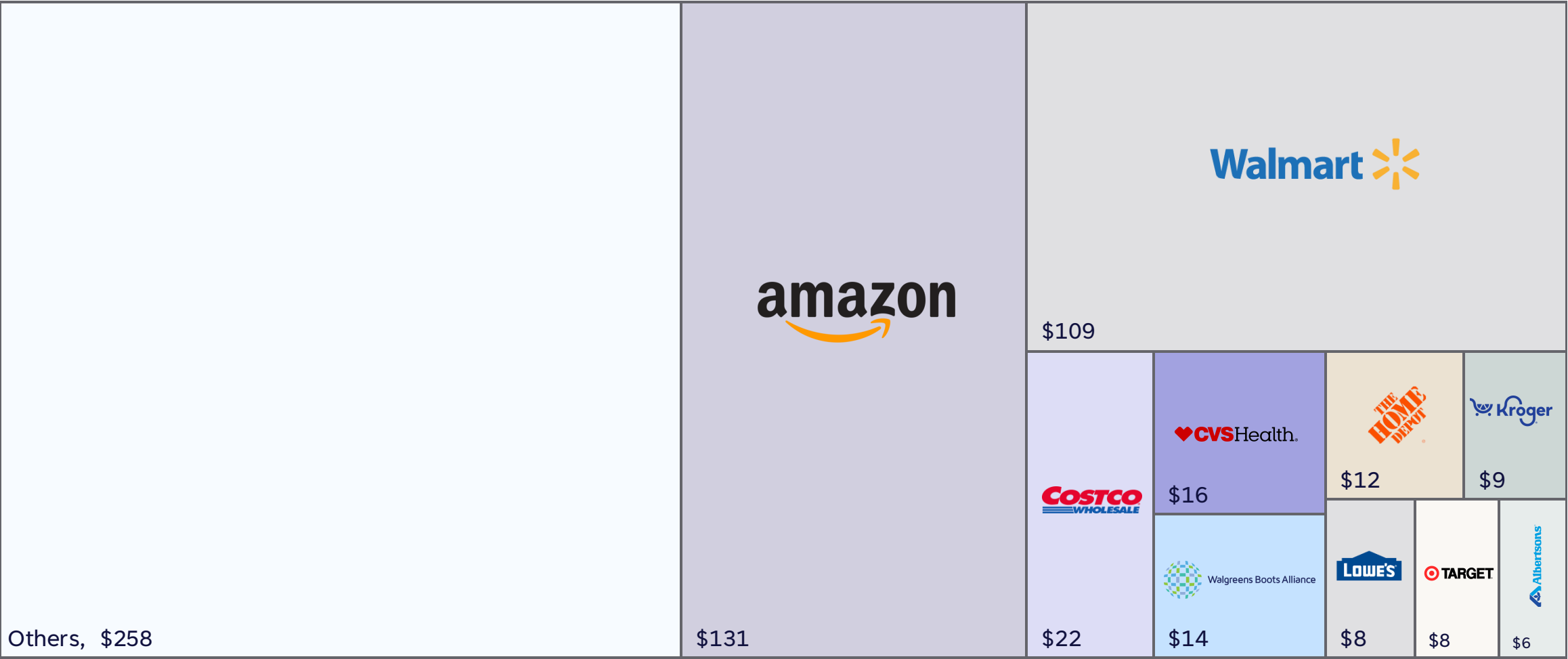
USA: Top 10 Retailers by Sales, 2025, 2026 & 2029



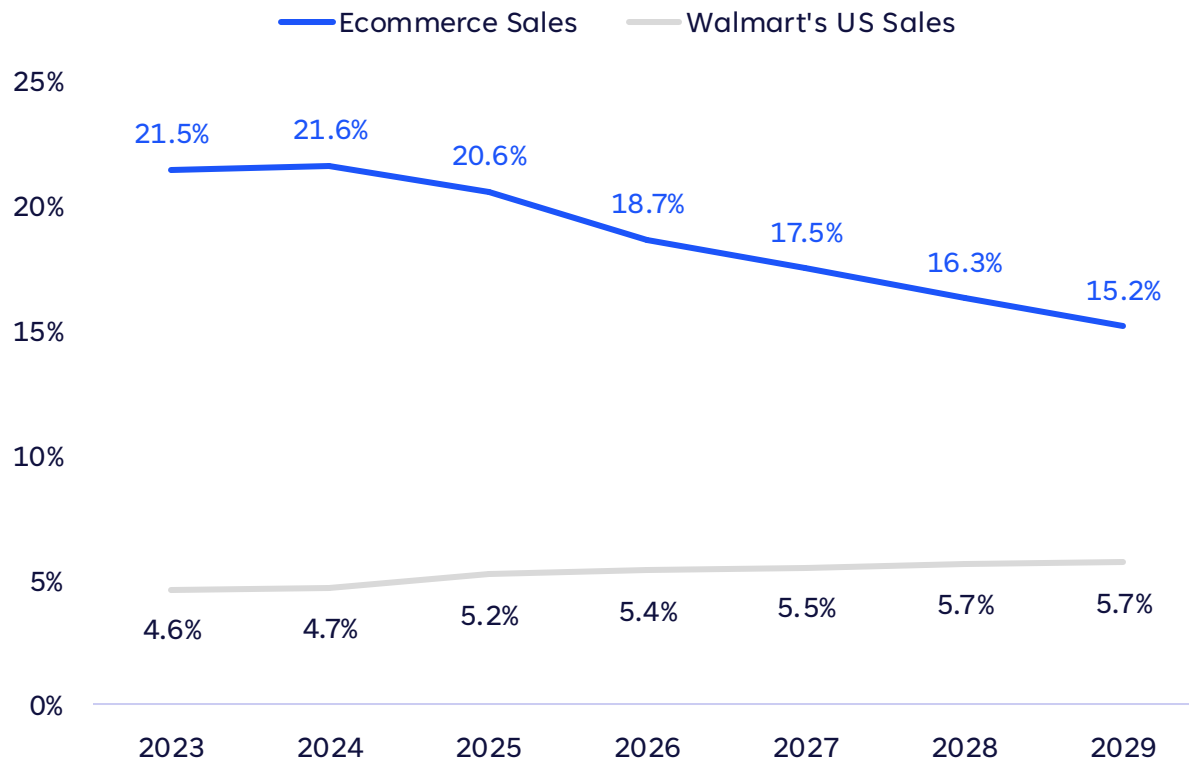
The Top 10 will account for 57% of all sales added between 2026-29



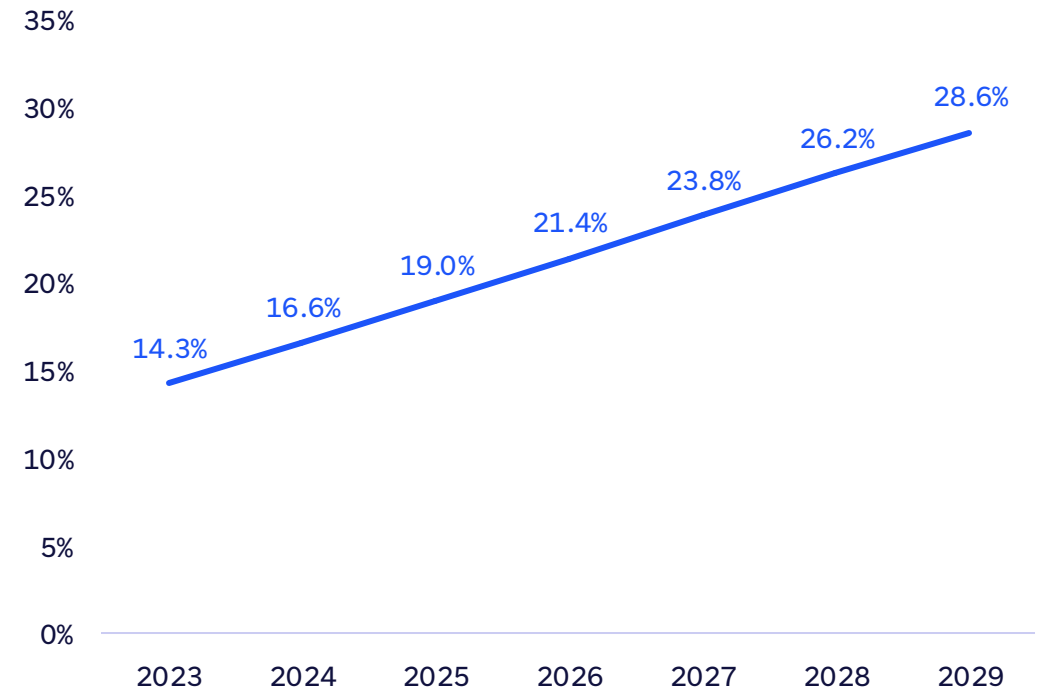
USA: Additional Chain Retail Sales by Retailer, 2026-2029 (US\$ bn)



Sales YoY change

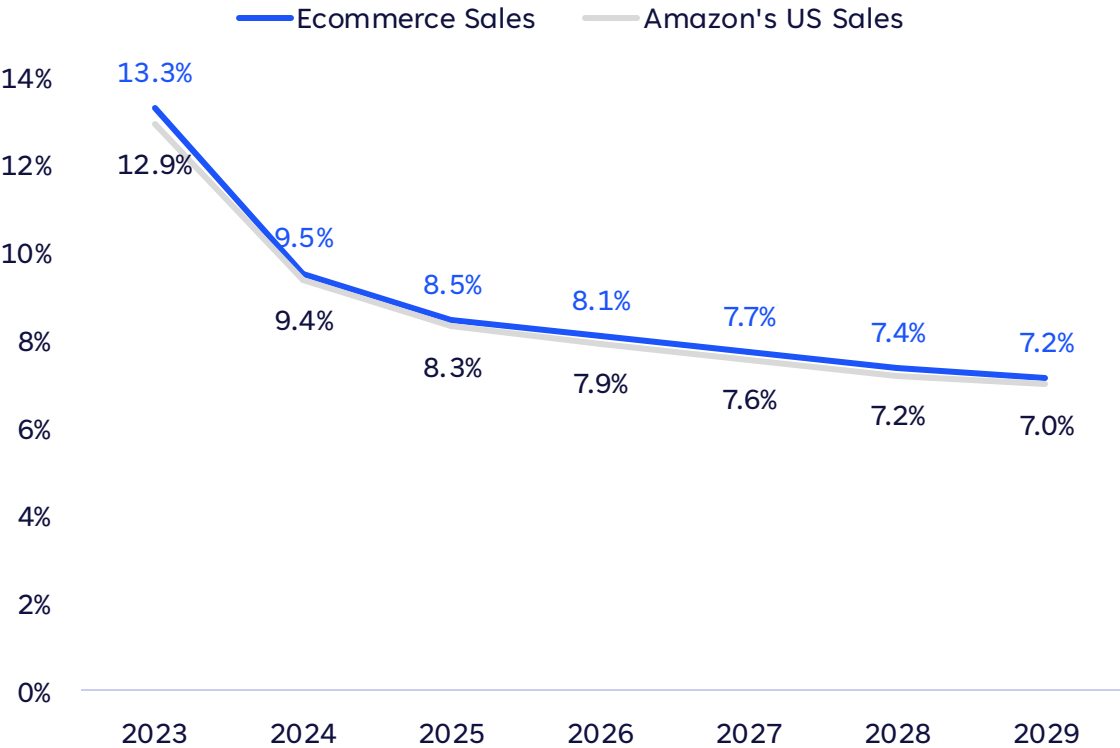


Ecommerce Penetration (% of Walmart's US sales)

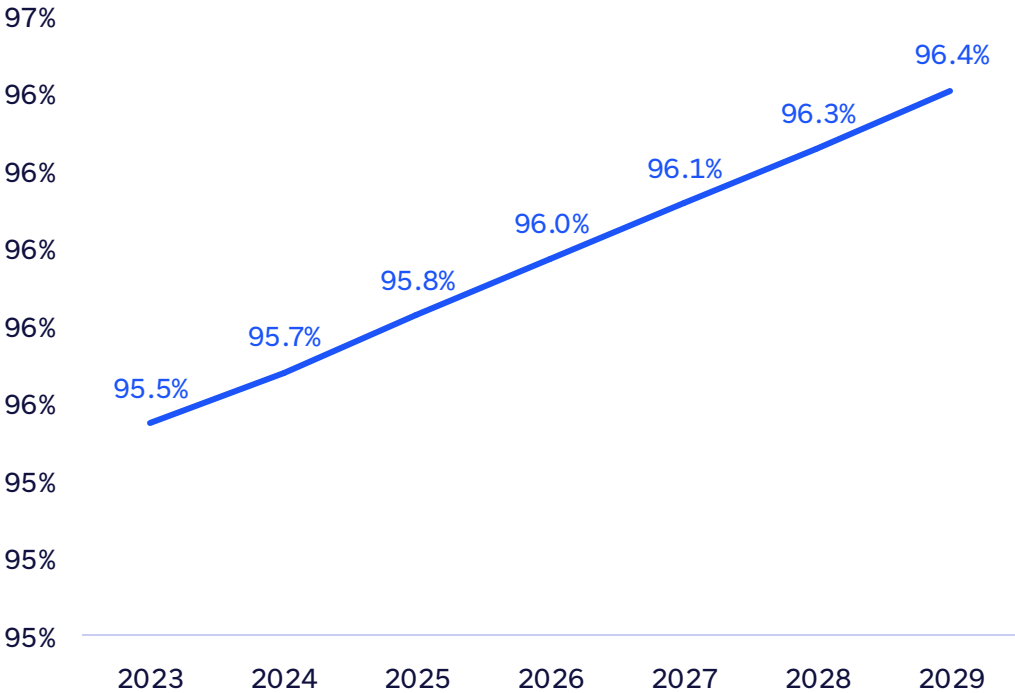




Sales YoY change

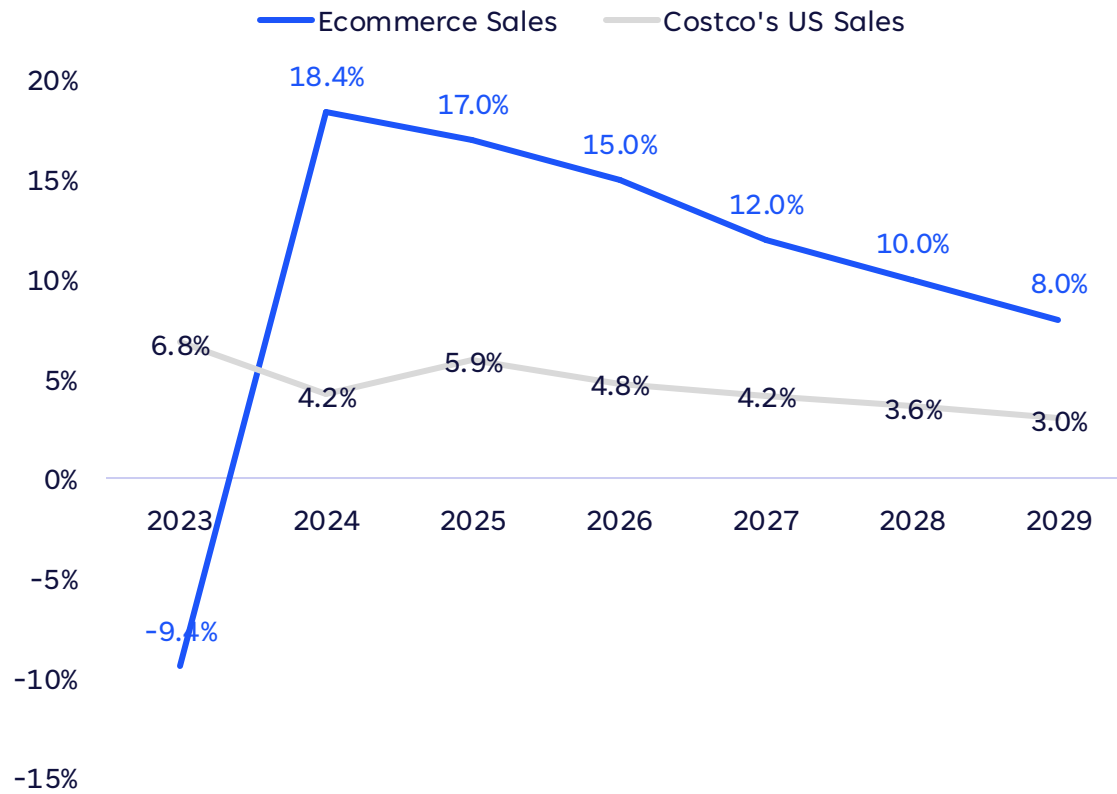


Ecommerce Penetration (% of Amazon's US sales)

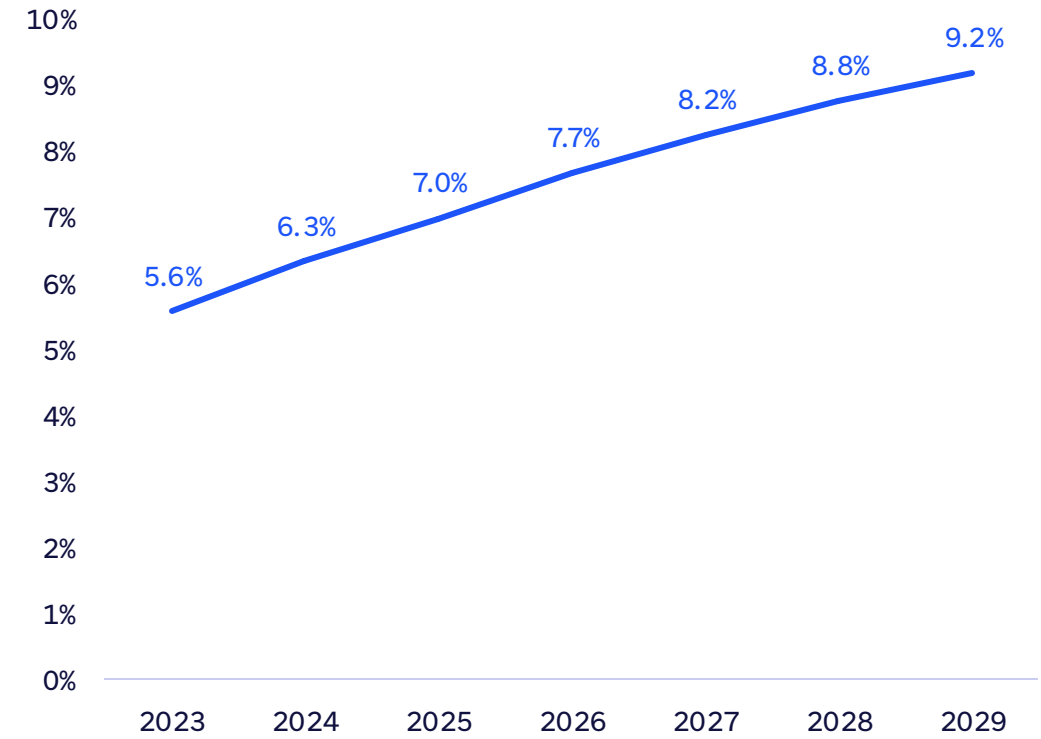




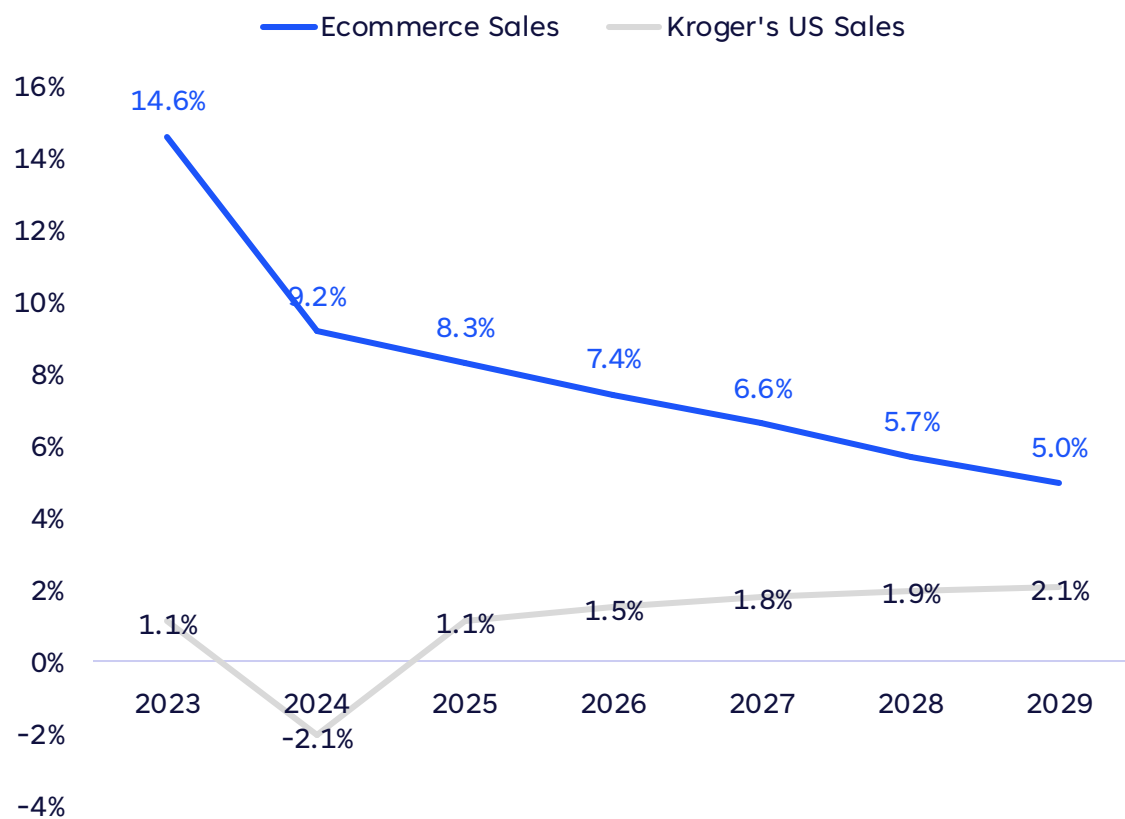
Sales YoY change



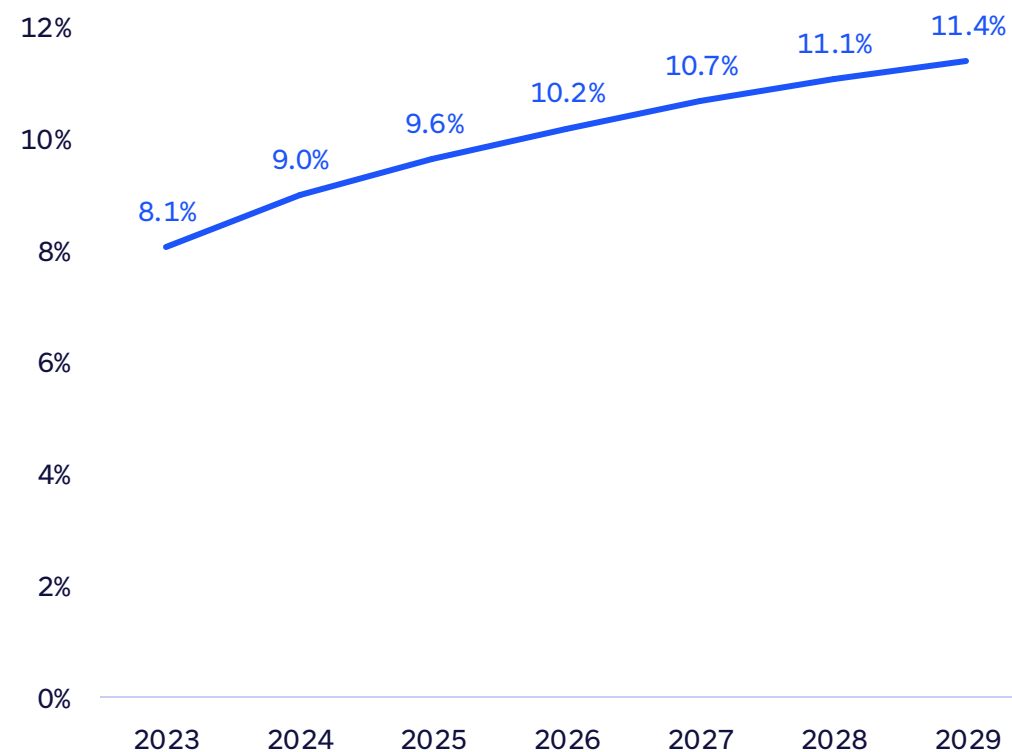
Ecommerce Penetration (% of Costco's US sales)



Sales YoY change



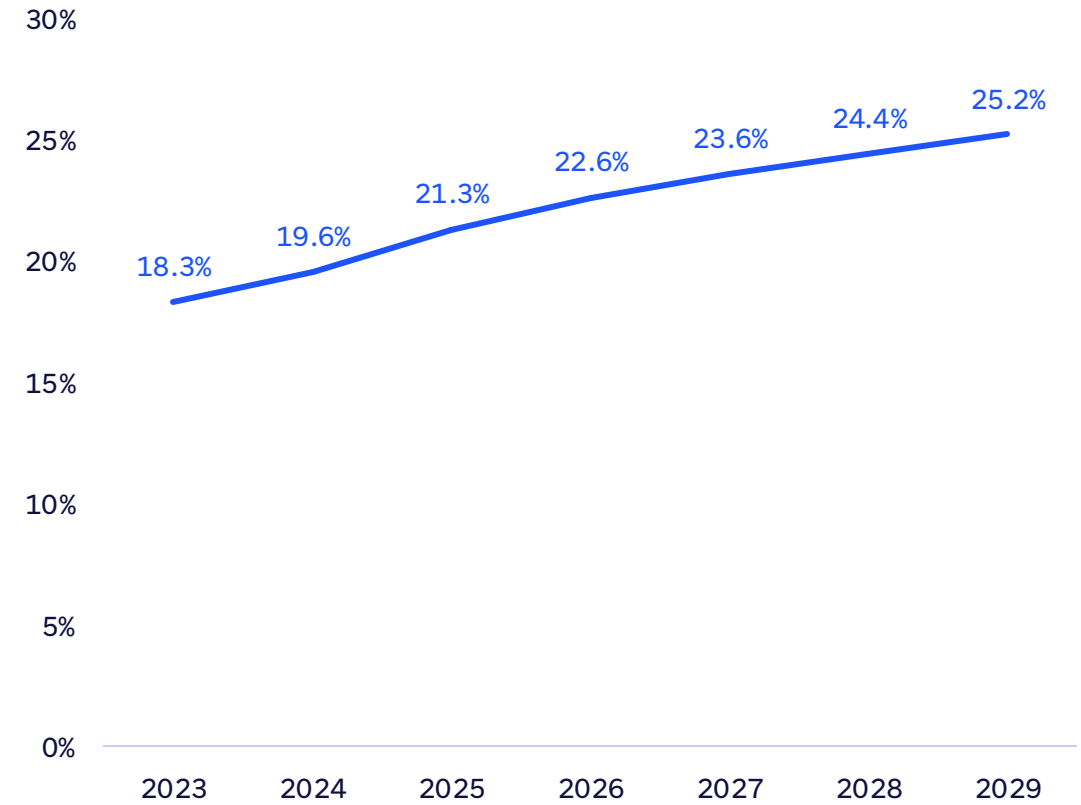
Ecommerce Penetration (% of Kroger's US sales)



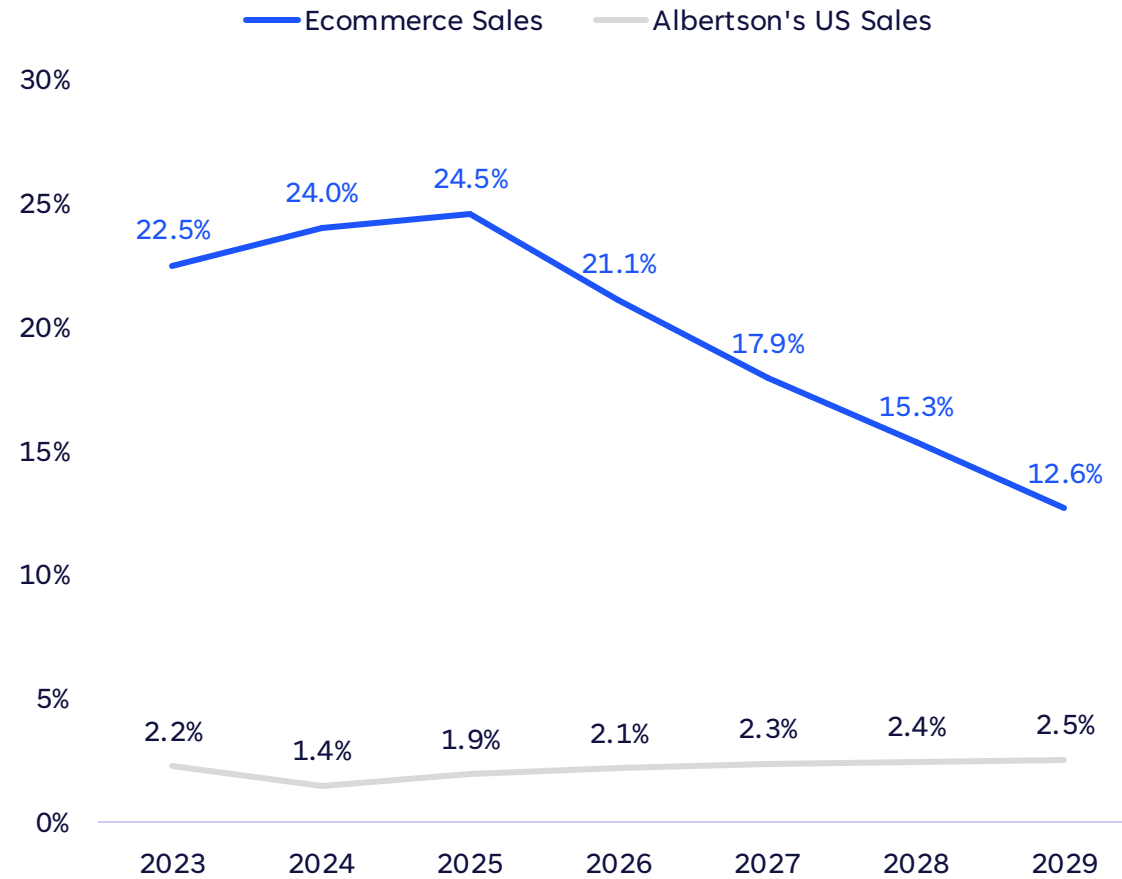
Sales YoY change



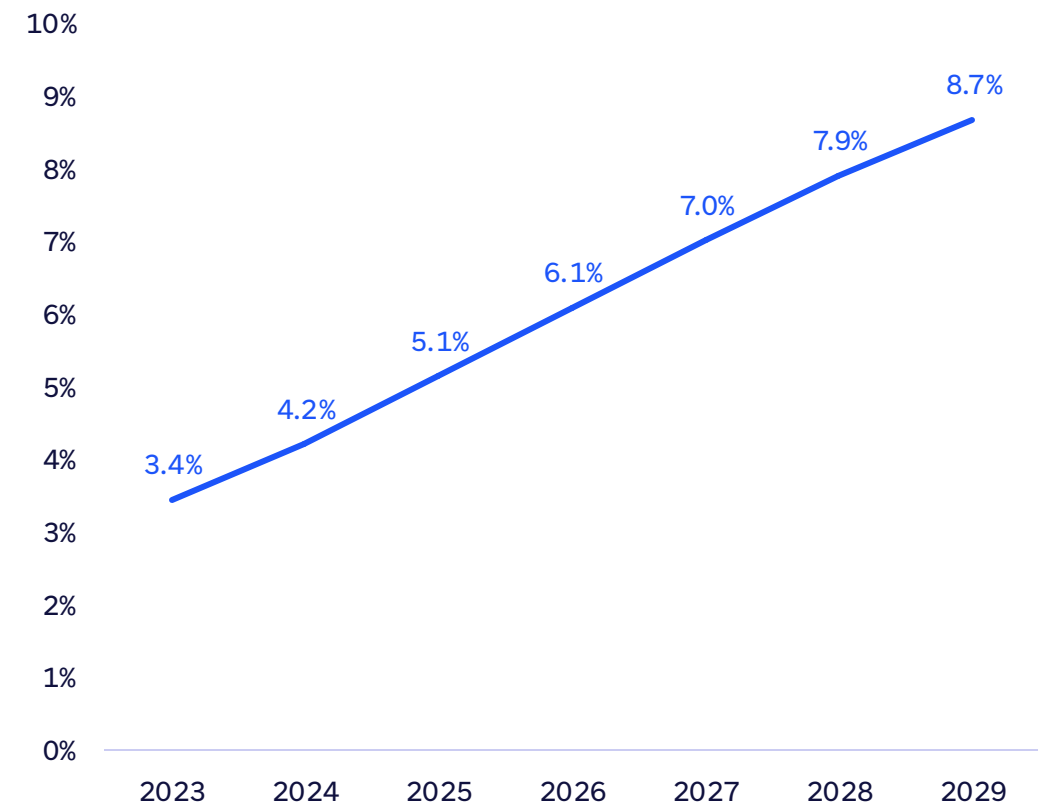
Ecommerce Penetration (% of Target's US sales)



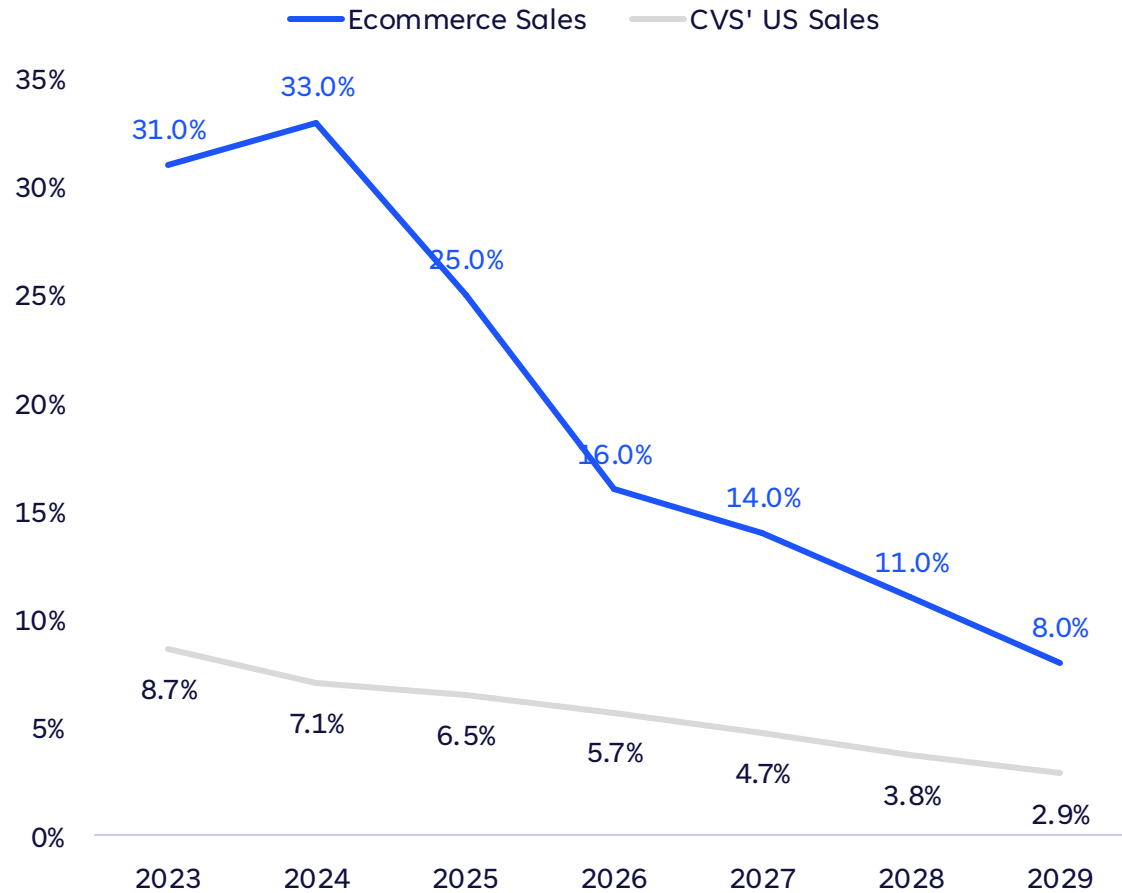
Sales YoY change



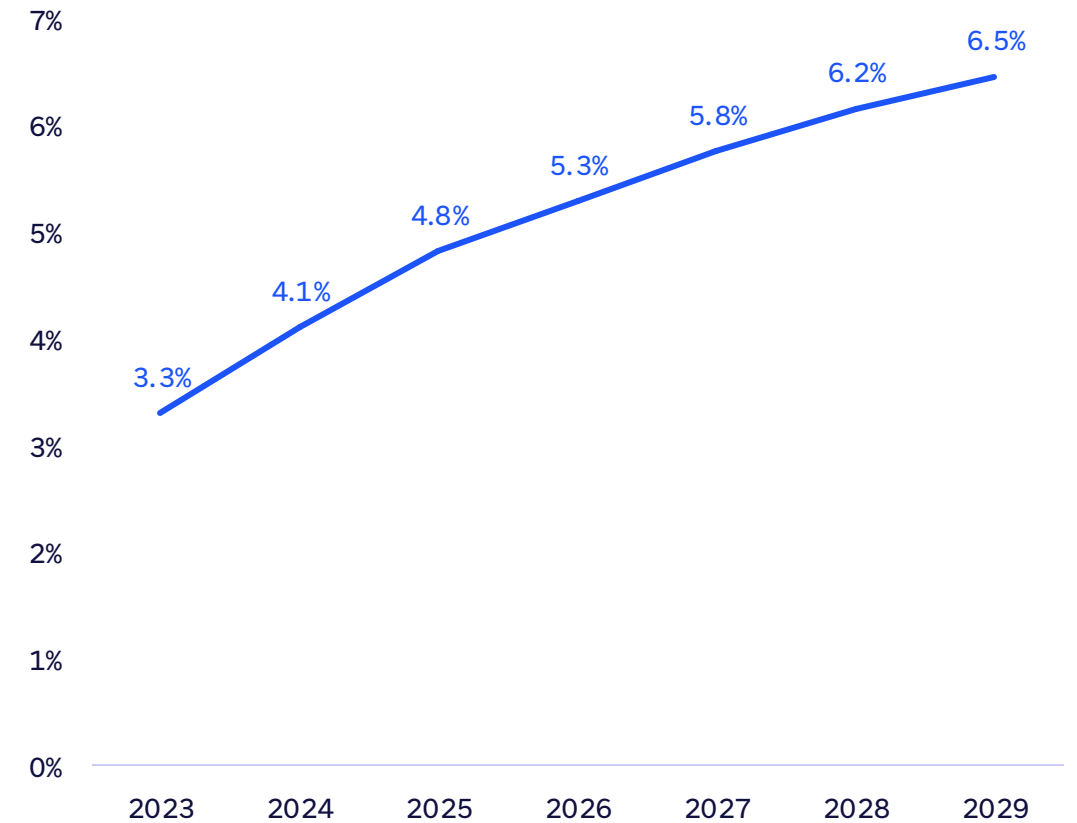
Ecommerce Penetration (% of Albertson's US sales)



Sales YoY change

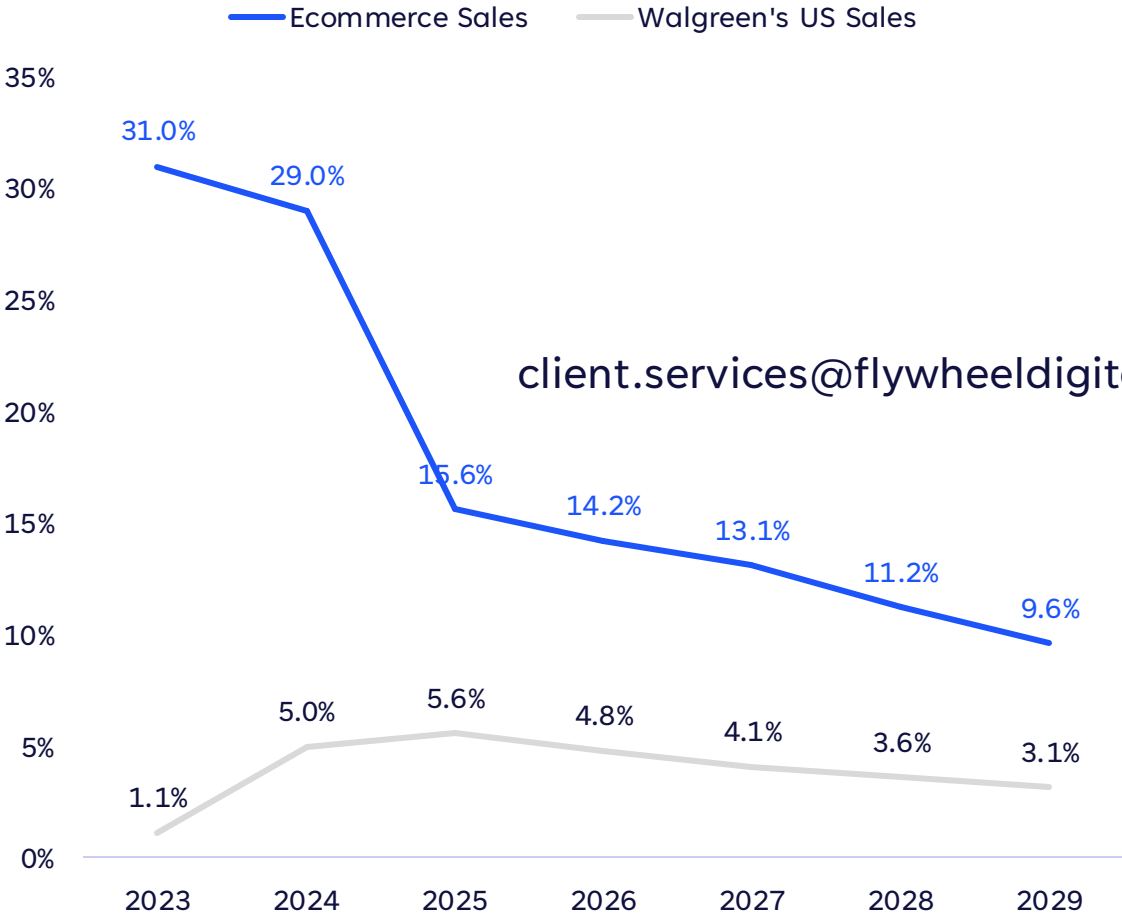


Ecommerce Penetration (% of CVS Health's US sales)

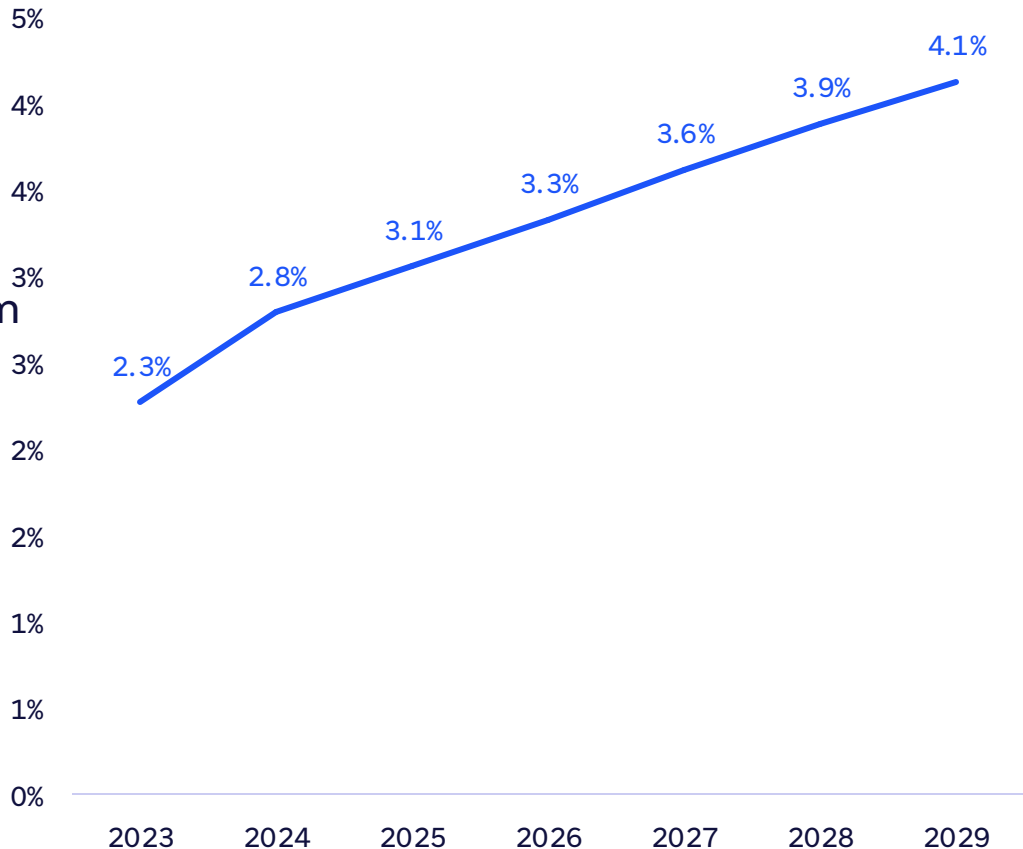




Sales YoY change



Ecommerce Penetration (% of WBA's US sales)



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can support your
business*



Flywheel's category sizing provides a comprehensive approach that creates standardized and comparable data

- **Unified Data Framework:** Integration of multiple proprietary databases including:
 - Retail Market Monitor tracking 2,300+ retailer operations globally
 - Quick Commerce database covering 850+ operations in 100+ markets
 - Proprietary Amazon/Walmart sales and share monitoring tools
- **Holistic Market Modeling:** Combining both brand-specific data and third-party sources to create accurate market sizing estimates with 5-year forecasts through 2030.
- **Multi-Dimensional Analysis:** Segmentation by:
 - Geographic market
 - Channel type (omnichannel, pureplay, social, quick commerce, eB2B)
 - Specific retailers and platforms
- **Actionable Outputs:** Delivers not just market sizing but strategic guidance on:
 - Market prioritization through segmentation
 - Channel investment allocation
 - Retailer partnership opportunities
 - Growth forecasting for proactive planning

This solution empowers regional brand leaders to make data-driven decisions with confidence, ensuring resources are allocated to the markets, channels, and retailers that offer the greatest growth potential for their specific category.



Key business questions to answer through a category sizing assessment

- 01 What is the total ecommerce **size of the prize** for your category now and in the future?
 - 02 What are the **largest markets** for my category in the region, as well as the fastest growing?
 - 03 How can I **make sense of multiple varied markets** in the region through segmenting and prioritising them based on size, growth and characteristics?
 - 04 What is the split between **pureplay, omnichannel and other channels**?
 - 05 Which retailers/platforms will grow the fastest and **who should we be partnering with**?
 - 06 Which **ecommerce business model(s)** present the best opportunity for my category online?
-





Thank you