



Global Retail Round-Up

December 2025

December 2025 Retail Round-Up



Hello and welcome to our December 2025 Retail Round-Up!

Capturing the latest point-of-sale displays and standout ideas shaping the Christmas season shopper experience. Inside you'll find fresh photography, sharp insights, and POS displays from across Europe.

Enjoy the read!

December **retail news**

Euro Area Retail Sales
vs. Nov 2024

0.2% ↑

Key Market
Performance

-0.6% ↓
Germany

0.5% ↑
France

-0.9% ↓
Poland

1.9% ↑
Denmark

5 Key Themes:

What shaped the retail landscape as we closed out 2025? Five key trends:



1. Frictionless checkout goes mainstream:

Amazon's Just Walk Out technology is scaling up, signalling a broader adoption of 'Cashierless' solutions. Retailers are betting on automation to cut costs and deliver seamless shopping experiences.



2. Beyond plant-based - diversification is key:

The plant-based meat boom is cooling. Brands like Rügenwalder Mühle are pivoting toward ready meals and functional foods, reflecting a shift from niche hype to broader health-focused portfolios.



3. Recipe reformulation under pressure:

Cocoa prices have soared, forcing major players to remove chocolate from iconic bars. Rising input costs are driving reformulation, smaller pack sizes, and alternative ingredients.



4. EU targets cheap imports:

New EU levies on low-cost imports aim to protect local industries and sustainability standards. Retailers dependent on ultra-cheap goods will need to rethink sourcing and pricing strategies.



5. AI & marketplaces reshape consumer goods:

Generative AI is powering ad campaigns despite hidden costs, while marketplaces like Amazon and Temu dominate through AI-driven personalization and logistics. Sustainability is emerging as a key differentiator in fashion supply chains.



Looking Ahead to 2026

Expect retail **tech adoption** to accelerate, with **AI** moving from marketing into inventory and pricing. **Sustainability** becoming a non-negotiable standard across supply chains. Watch for new **EU regulations**, continued **commodity volatility**, and marketplace dominance shaping consumer expectations.

Sources: Eurostat data November 2025; Retail TouchPoints - Amazon's Just Walk Out Tech Poised to Break Into a Run; WirtschaftsWoche - Was kommt nach dem Veggiefleisch-Hype?; FoodNavigator - Nestlé strips chocolate from iconic bars as cocoa costs soar; Portafolio - Precios del cacao y otros insumos estarían llevando a que se reformule la receta del chocolate; FinanzNachrichten - Abgabe auf Importe von Billigwaren in EU; FoodAffairs - Marketplace e AI ridisegnano il mercato dei beni di consumo; Digiday - Marketers are keen to use generative AI in ad campaigns, but hidden costs lurk; Supply Chain Digital - Supplier sustainability: The new fashion frontier



Display activity in-store this December...

 = displays produced by DS Smith

Gifting Displays



 **Carrefour**
Barbie



 **Drugstore**
Nivea gifting



 **Edeka**
Merci

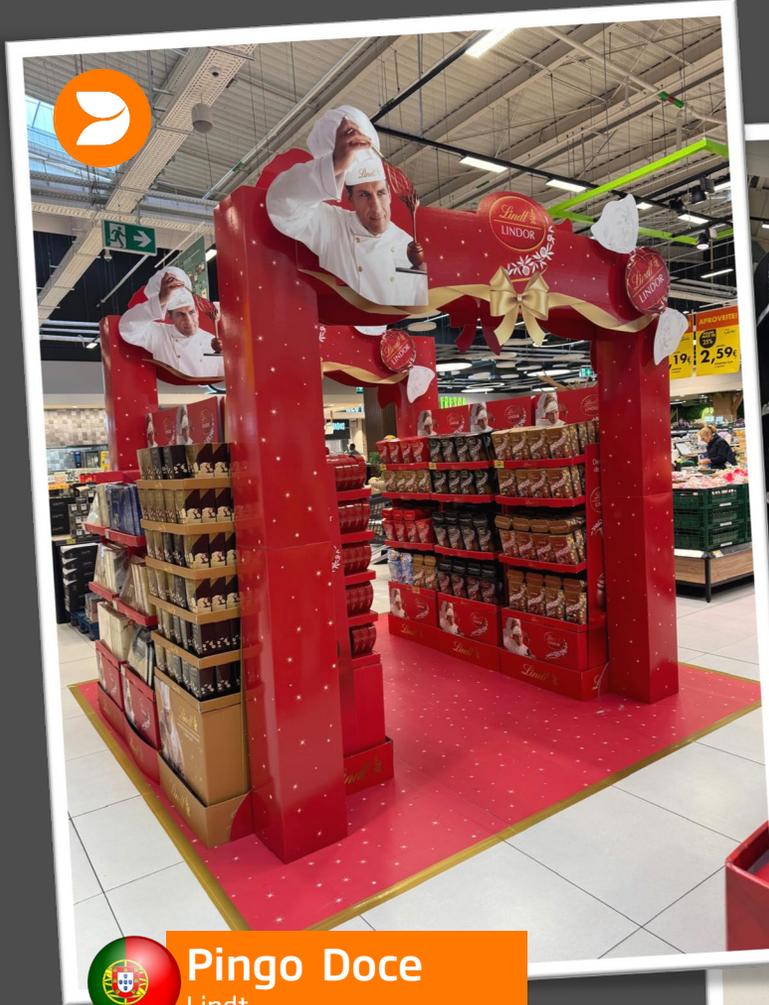


 **Tchibo**
Winter Sale

 **Familia**
Niegeregger



Portugal Gifting Displays



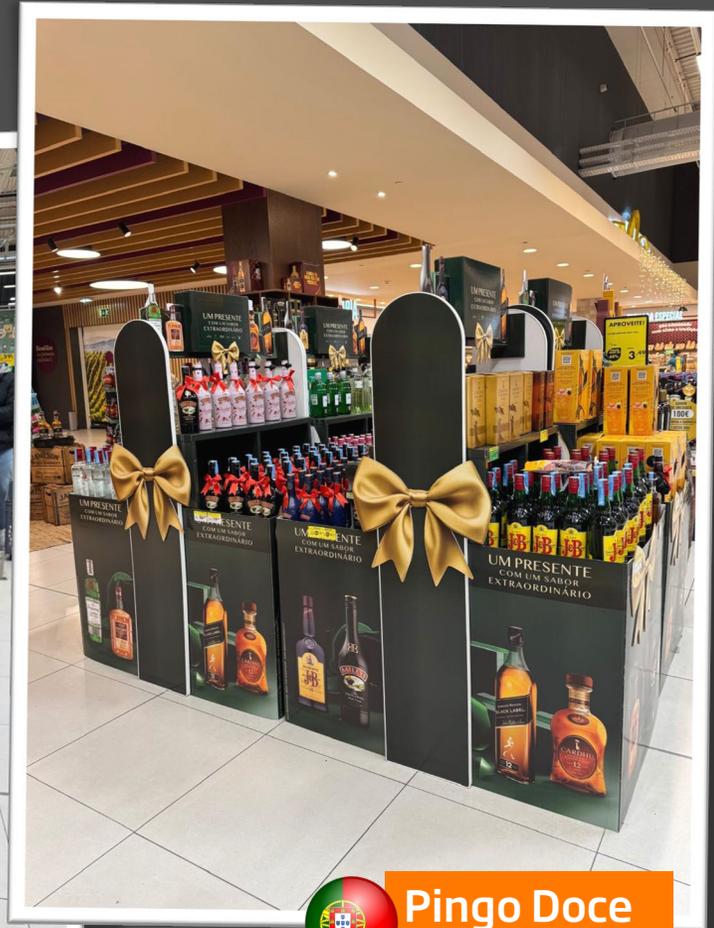
 **Pingo Doce**
Lindt



 **Pingo Doce**
Nivea

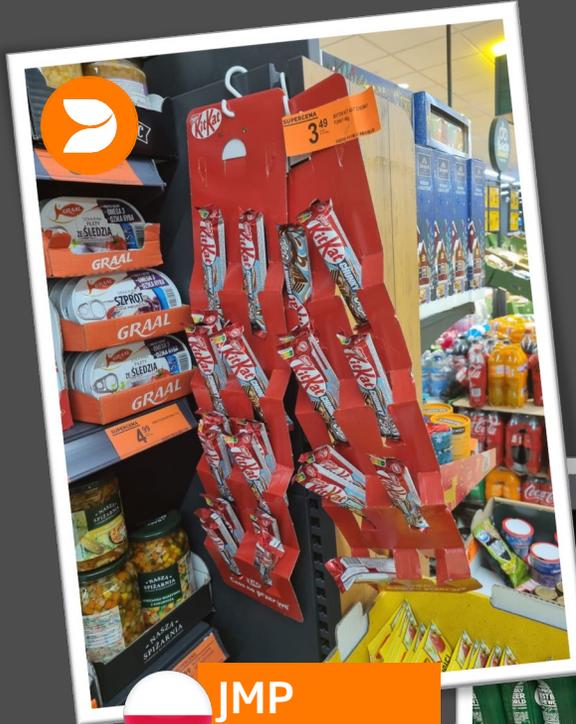


 **Pingo Doce**
Baileys



 **Pingo Doce**
Mixed Spirits

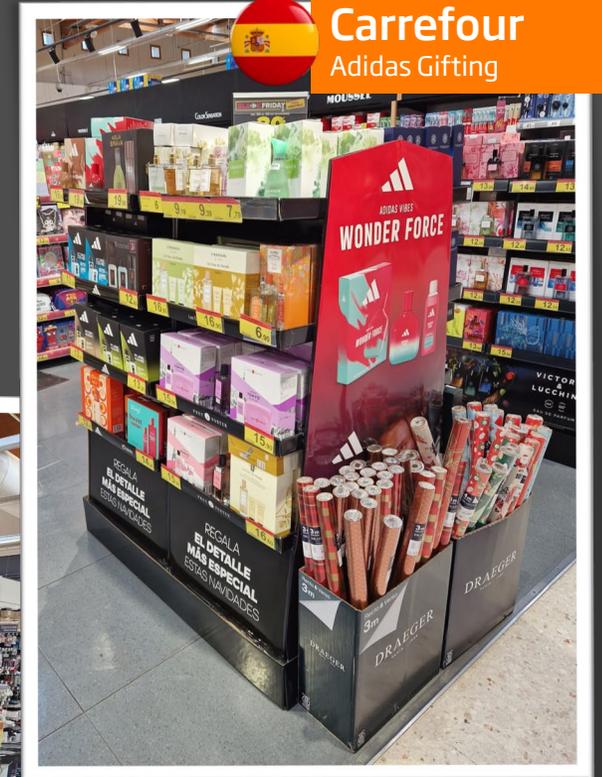
Alternative Displays



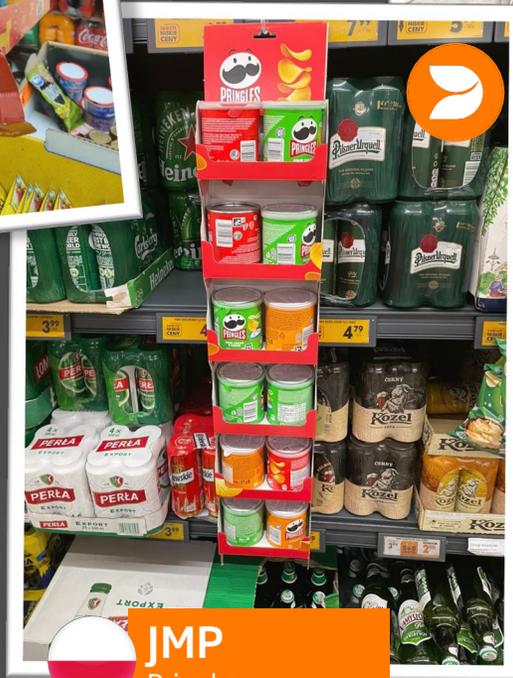
JMP
KitKat



Carrefour
Trident



Carrefour
Adidas Gifting



JMP
Pringles



Carrefour
Einhell tools

Seasonal Displays



Carrefour
Oral B



Carrefour
Gifting displays



Famila
Storck



Carrefour
Axe gifting



Seasonal Displays



 **El Corte Ingles**
Lindt



 **El Corte Ingles**
Ambi Pur



 **El Corte Ingles**
Juvé & Camps Cava



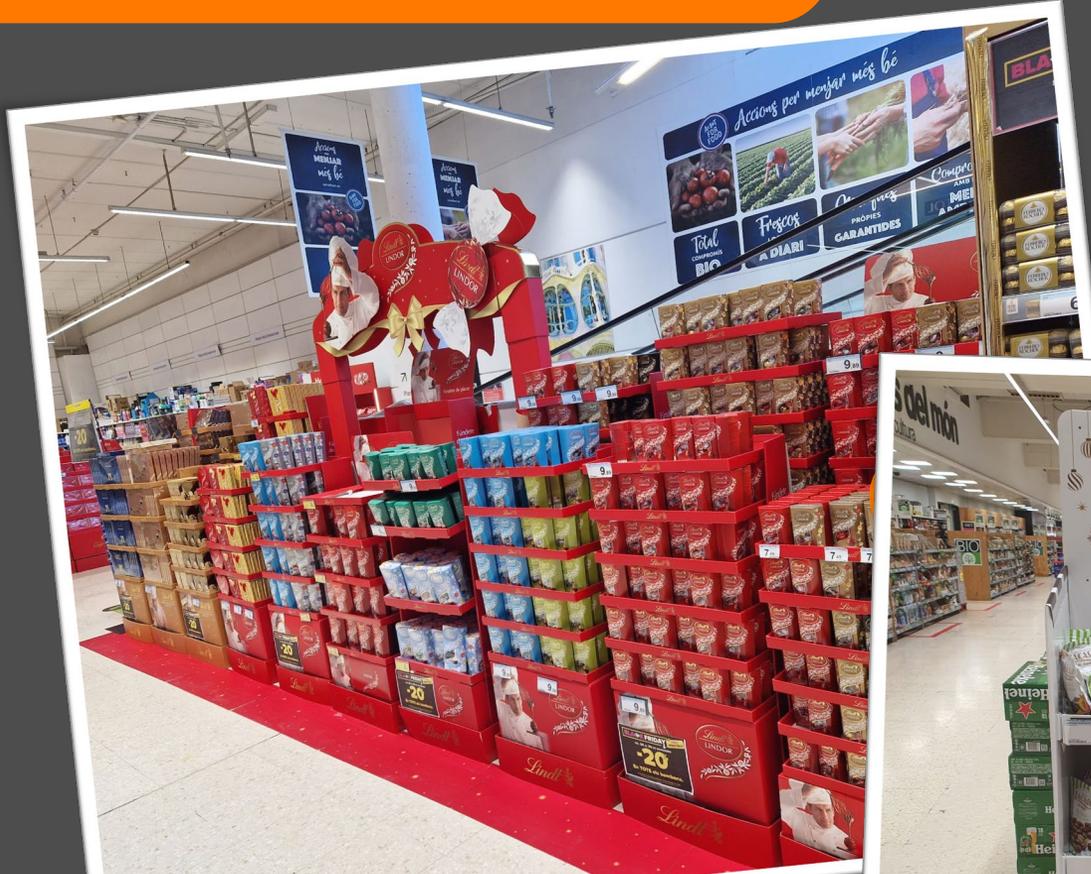
 **El Corte Ingles**
Milka

Seasonal Confectionery



Carrefour Barcelona

Kinder



Carrefour Barcelona

Lindt



Carrefour Barcelona

Lacasa

Pre-filled Displays



 **Tchibo**
Eduscho Coffee



 **Carrefour**
Lindt



 **Carrefour**
Mixed alcohol half pallets



 **Carrefour**
Lindt



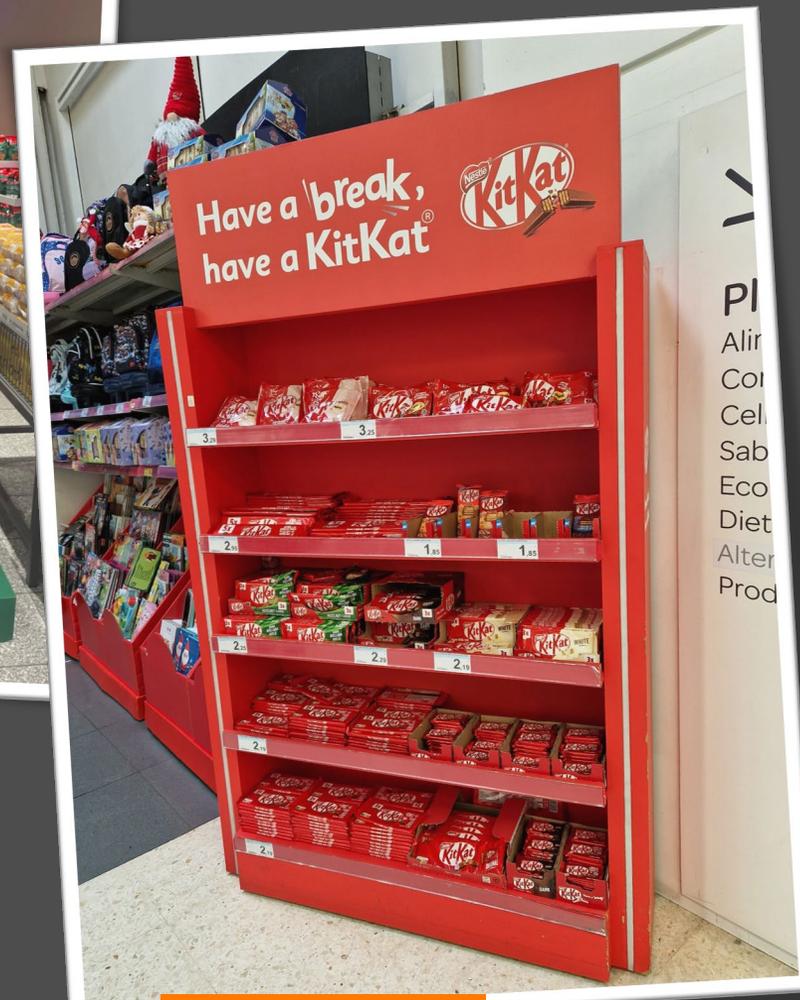
 **Carrefour**
Lindt



 **Carrefour**
Mixed alcohol half pallets

Big Brand Displays

 **Combi**
Coca-Cola



 **Carrefour**
KitKat Perm display



 **Combi**
Coca-Cola



 **Combi**
Coca-Cola

Confectionery Modular Display



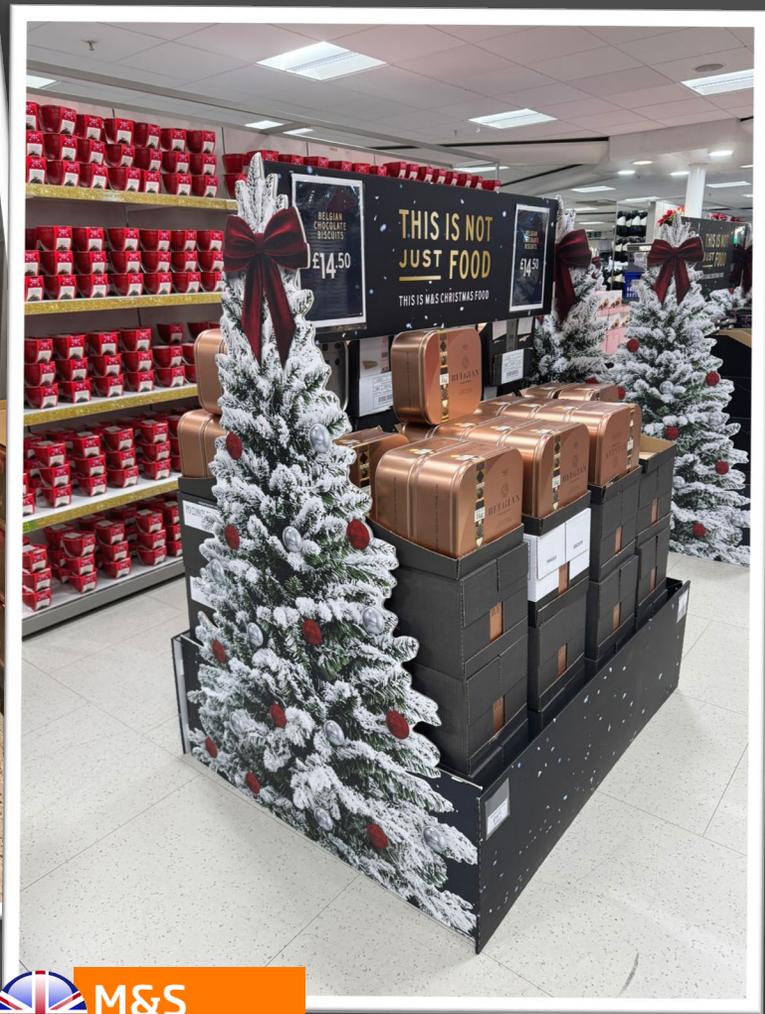
 **Sainsbury's**
Coca-Cola



 **Sainsbury's**
Cadbury's



 **Sainsbury's**
San Pelligrino



 **M&S**
Belgian Biscuits

Multi Product Displays



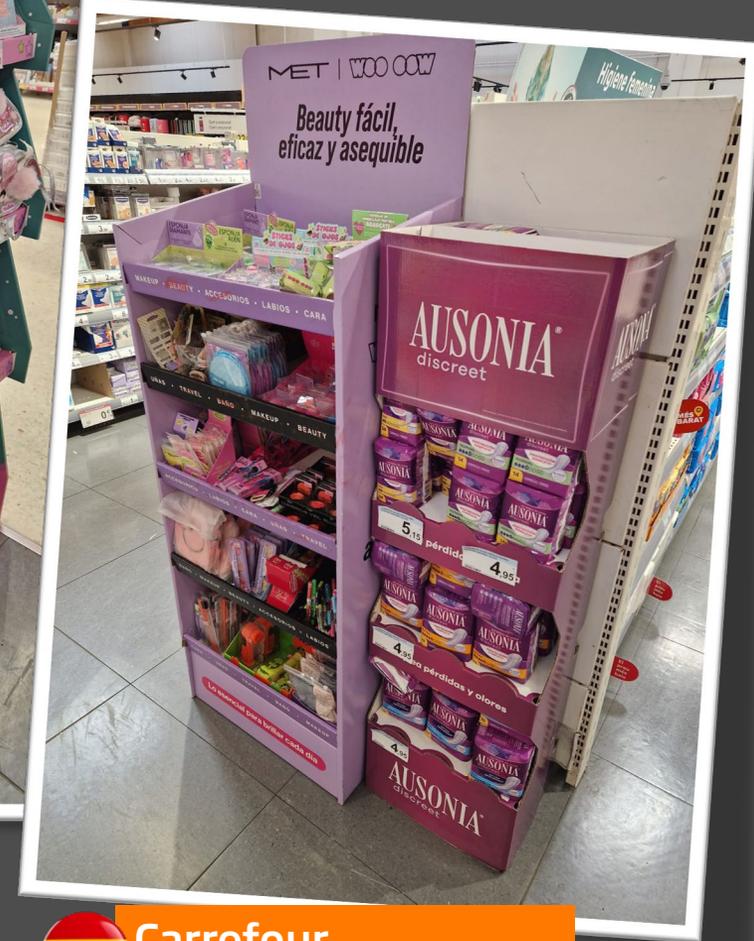
Carrefour
Purina



Carrefour
Pedigree / Whiskas



Carrefour
L'Oréal Gifting



Carrefour
Personal Care by Met and Ausionia



Carrefour Toys & DIY



Carrefour
Hot Wheels



Carrefour
Pattex Nor More Nails



Carrefour
Max Retro



Carrefour
Bluey Toy Range

Confectionery Modular Display



Carrefour
Nestle Christmas Display



Carrefour
Nestle Christmas Display

A glass of mulled wine with orange slices, cinnamon sticks, and star anise, set against a background of Christmas lights and decorations.

December consumer trends

December **European shopping trends**



Travel gifting takes centre stage

Experiential Travel: 2025's Top Luxury Gift for the Holidays

Luxury holiday providers across Europe reported heightened demand for **curated private-home stays and wellness experiences**, confirming that meaningful moments, not just objects, defined the holiday gifting season, with Airbnb, Marriott, Delta, Ryanair, GetYourGuide, and Eurostar Among the Most Used Travel Gift Cards in 2025



Sustainability and retailing

CSR Retail Index Europe Ranks Top Sustainable Retailers

At year-end, Carrefour, Eroski, and Jerónimo Martins were highlighted for **linking executive pay to sustainability**, cutting emissions, reducing food waste, and championing eco-packaging—backs up the green purchasing trend.



Click-and-collect & hybrid shopping surge

Click-and-collect orders hit record highs as shoppers combined online convenience with in-store pickup for last-minute gifts.

UK and Nordic retailers reported **double-digit growth** in BOPIS (Buy Online, Pick Up In Store) during the final week before Christmas.

Sources:

Travelandtourworld - travel cards ; Deloitte Holiday Retail Survey Europe 2025 - Insights on early shopping, omnichannel behaviours, and economic caution; McKinsey Consumer Pulse Report - Analysis of AI-driven shopping tools, value-seeking behaviours, and persistent home-centric habits; European Retail Market Reports & Fashion/Beauty Associations - Data on popular product categories (beauty, apparel, sustainable goods) and second-hand market growth; Ecommerce Europe, Dec 2025 - click and collect drives holiday sales;

2026 upcoming seasonal opportunities



Chinese New Year (Feb 10, 2026)

What to Expect:

Year of the Horse activations with strong premium gifting offers, festive packaging, and seasonal theatre in-store. Retailers leaning into cultural storytelling and limited-edition SKUs for gifting occasions.

Opportunities:

Corrugated display kits that allow theme elevation and cross selling e.g. recipes; gifting. Retail media integration–QR codes linking content.

Threats:

Supply chain volatility (Red Sea route disruptions) may delay imported goods–retailers will push local sourcing and fast-turn POS.



Valentine's Day (Feb 14, 2026)

What to Expect:

Growth in affordable luxuries–beauty, confectionery, and experiential gifts (dining vouchers). Expect impulse zones near checkouts and cross-category bundles (flowers + wine + chocolate)

Opportunities:

Compact FSDUs for small indulgences, designed for high-traffic areas. Eco-friendly gift-wrap and packaging – visible sustainability wins hearts and helps shopper understand how to manage gifting waste.

Threats:

Margin pressure–retailers will demand cost-efficient POS that installs quickly and uses mono-materials



Easter (April 2026)

What to Expect:

Family-oriented displays for confectionery, baking, and gifting. Surge in click-and-collect for last-minute Easter treats–hybrid shopping remains strong.

Opportunities:

Shelf-ready packaging (SRP) linked to display look and feel for fast replenishment and modular seasonal bays for chocolate and bakery. Circularity storytelling–egg hunt zones with recyclable props and closed-loop messaging

Threats:

Retail price wars and stock replenishment for popular chocolate egg lines.



Sources:

Chinese new year- IGD & Coresight Research outlooks for seasonal retail 2026; Valentine's Day - Mastercard SpendingPulse Europe & IGD seasonal trends; Easter - JLL retail outlook & ISE Europe in-store media predictions



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Our innovation strategy is based on delivering our objectives on the immediate, medium and long-term horizon. We are investing globally in our people, plants and our partner ecosystem. [Contact us](#) about how we can innovate for now and for next.



Packaging

[DS Smith Packaging solutions](#)

We help stores increase efficiency, boost turnover and reduce costs. [Contact us](#) to connect with industry leading packaging strategists.



Sustainability

[DS Smith Sustainability](#)

Our circular business model is built around sustainability, and we are leading the way towards a low-carbon, circular economy.

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Thank You

Danke Dankjewel Благодаря 谢谢 Hvala Děkují Tak Aitäh Kiitos Merci Ευχαριστώ
Köszönöm Grazie Paldies Аціў Ви благодарам شکرالکم Dziękuję Obrigado Mulțumesc
Ďakujem Gracias Tack ขอบคุณ Teşekkür ederim

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