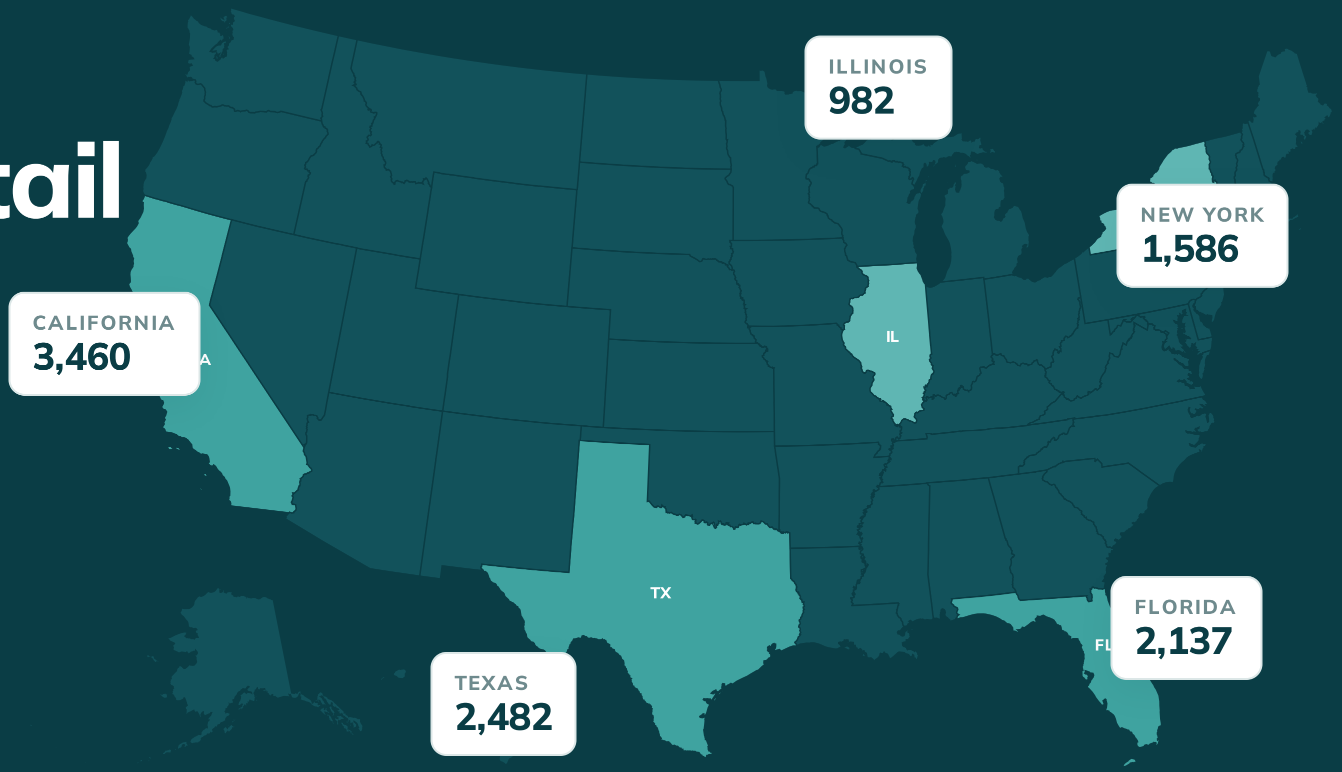
MARKET INTELLIGENCE

DATADWIP RESEARCH · UNITED STATES · 2026

US Multi-Location Retail Intelligence Report

The Data Opportunity Behind America's Multi-Location Retail Market

What retail leaders need to know about pricing, products, competitors, locations and market intelligence in 2026.



RETAIL COMPANIES IN THE MODELED UNIVERSE · TOP FIVE STATES · MODELED

$7.99T
ESTIMATED 2026 U.S. RETAIL MARKET

$3.7B
ESTIMATED 2026 PRICE-INTELLIGENCE SOFTWARE MARKET

$326.7B
Q1 2026 U.S. E-COMMERCE SALES

RESEARCH PERIOD	DATA CURRENCY	PREPARED BY	NEXT UPDATE
August 2026	2024–2026	DataDwip Research Team	Q4 2026

Contents

US Multi-Location Retail Intelligence Report · August 2026

How to read this report. Each section opens with the headline number, followed by the evidence and a short analytical interpretation. Official statistics are cited inline; estimates, projections and modeled values carry an explicit tag.

OFFICIAL · EST. / PROJECTION · MODELED · DATADWIP ASSESSMENT

EXECUTIVE SUMMARY

The data opportunity behind America's multi-location retail market

The U.S. retail market is not simply growing — it is becoming more fragmented, more competitive and increasingly data-dependent. Retailers are simultaneously managing thousands of physical locations, millions of products and SKUs, constant competitor price changes, rapid e-commerce growth, store openings and closures, regional competition, omnichannel customer journeys and increasing pressure on margins.

**Retailers don't have a data shortage.
They have a data intelligence problem.**

This creates a growing requirement for real-time competitive, product, pricing and location intelligence — delivered continuously rather than annually.

KEY INSIGHT

Growth is no longer evenly distributed. E-commerce is compounding roughly two and a half times faster than total retail, store networks are contracting on a net basis, and competitive intelligence has become its own software category. The opportunity sits where those three forces meet.

FIVE NUMBERS THAT DEFINE THE OPPORTUNITY

MARKET SIGNALS · 2025–2026

$7.99T
ESTIMATED 2026 U.S. RETAIL MARKET

16.8%
PROJECTED CAGR OF THE GLOBAL PRICE-INTELLIGENCE SOFTWARE MARKET THROUGH 2034

$1.6B
ESTIMATED 2026 RETAIL SEGMENT OF PRICE-INTELLIGENCE SOFTWARE

15,000
RETAIL STORE CLOSURES RECORDED FOR 2025 IN THE SUPPLIED MARKET MODEL

Price + Product + Competitor + Location + Marketplace
RETAIL INTELLIGENCE IS BECOMING CONTINUOUS RATHER THAN PERIODIC

Sources: U.S. Census Bureau; Market Intelo; Coresight Research; supplied Campaign 2 market model.

FIVE MARKET SIGNALS

The forces reshaping U.S. retail

The entire market story in under a minute — five signals, five numbers, one direction of travel.

01

$7.99T

Retail remains enormous

Estimated 2026 U.S. retail market size in the supplied market model.

EST.

02

+9.8%

Digital is growing faster

Q1 2026 e-commerce growth versus +3.9% total retail growth.

OFFICIAL

03

15,000

Store networks are changing rapidly

2025 store closures in the supplied market model, against 5,270 openings.

MODELED

04

$3.7B

Competitive intelligence is a market

Estimated 2026 price-intelligence software market, growing at a projected 16.8% CAGR.

EST.

05

Continuous

Retail intelligence never stops

Price, product, competitor, location and marketplace intelligence increasingly need continuous monitoring.

ASSESSMENT

MARKET SIGNAL

Retail is expanding in value while contracting in physical footprint and accelerating in digital share. Each of those movements is measurable — but only with data collected continuously rather than once a year.

Sources: U.S. Census Bureau (Q1 2026); Market Intelo; Coresight Research Store Tracker; supplied Campaign 2 market model.

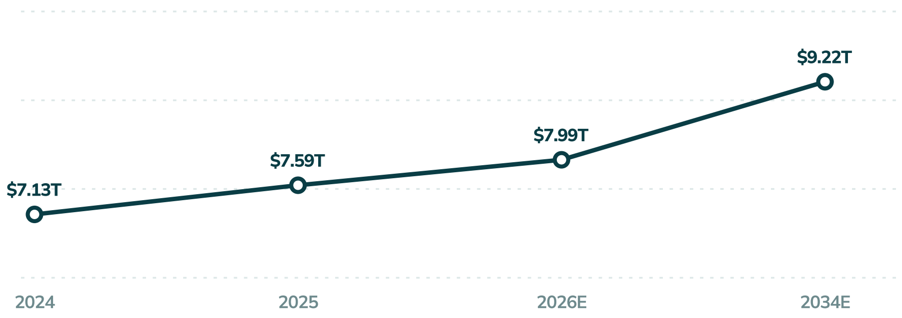
THE U.S. RETAIL MARKET

Market size and growth, 2024–2034E

U.S. retail continues expanding despite structural channel change.

U.S. RETAIL MARKET SIZE

USD TRILLIONS · 2024–2034E

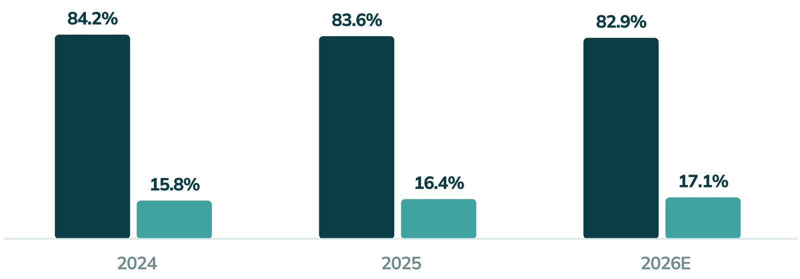


Source: Supplied Campaign 2 market model; U.S. Census Bureau. 2026E and 2034E are projections.

YEAR	MARKET SIZE	YOY GROWTH	E-COMMERCE SHARE	BRICK-AND-MORTAR SHARE
2024	$7.13T	+3.8%	15.8%	84.2%
2025	$7.59T	+6.4%	16.4%	83.6%
2026E PROJ.	**$7.99T**	**+5.3%**	**17.1%**	**82.9%**
2034E PROJ.	$9.22T	+2.19% CAGR	22–25%	75–78%

CHANNEL MIX OF U.S. RETAIL

% SHARE OF TOTAL RETAIL



Source: Supplied Campaign 2 market model.

KEY INSIGHT

Retail remains predominantly physical, but digital penetration rises roughly 0.6–0.7 points per year. Intelligence that covers only one channel now describes less than the whole market.

MARKET-DEFINITION NOTE

Different organizations define the “retail market” differently. NRF's 2026 forecast covers $5.6T in retail sales, while broader market estimates produce higher totals. These figures should not be treated as conflicting measurements of exactly the same market. This report retains the $7.13T–$7.99T series from the supplied Campaign 2 market model.

RETAIL MOMENTUM

The latest signals

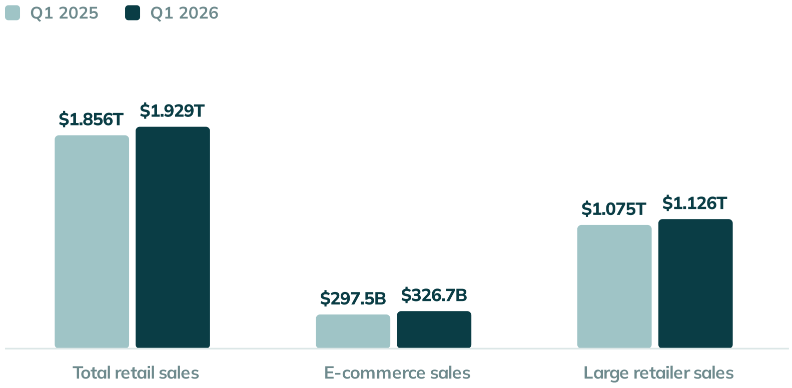
Quarterly and monthly official data, Q1 2026 and June 2026.

$1.929T
Q1 2026 TOTAL RETAIL SALES · +3.9% YOY

$326.7B
Q1 2026 E-COMMERCE SALES · +9.8% YOY

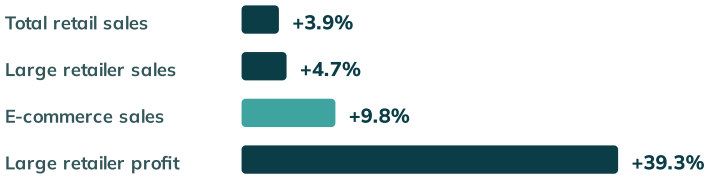
16.9%
E-COMMERCE SHARE OF TOTAL RETAIL, Q1 2026

Q1 2025 VS Q1 2026
USD BILLIONS



Source: U.S. Census Bureau, Q1 2026 quarterly retail and e-commerce releases. Q1 2025 values approximate as supplied.

Q1 2026 GROWTH RATE COMPARISON
% YEAR OVER YEAR



Source: U.S. Census Bureau, Q1 2026. Large retail corporation after-tax profit rose from $46.3B to $64.5B.

LATEST MONTHLY RETAIL MOMENTUM
RETAIL AND FOOD-SERVICES SALES

PERIOD	SALES	MOM	YOY
April 2026	—	+1.0%*	—
May 2026	—	—	—
June 2026	**$768.6B**	**+0.2%**	**+6.7%**
Apr–Jun 2026	—	—	+6.4%

*Revised Census estimate. Source: U.S. Census Bureau, Advance Monthly Retail Trade Report.

KEY INSIGHT

E-commerce is growing materially faster than total retail — +9.8% versus +3.9% in Q1 2026. Retailers increasingly need to understand competitor prices, product availability, online assortment, store availability and regional competition simultaneously.

DATA CURRENCY NOTE

As of August 14, 2026, July 2026 retail sales had not yet been officially released; Census lists the July release for September 16, 2026. Q2 2026 e-commerce data is scheduled for August 18, 2026. June 2026 is therefore the latest monthly observation and Q1 2026 the latest official quarterly e-commerce observation.

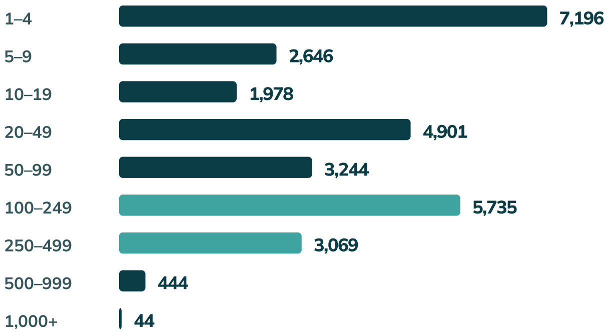
WHERE DOES RETAIL INTELLIGENCE HAVE THE STRONGEST FIT?

Company size, adoption and operating complexity

Establishment distribution and modeled adoption rates point to one band of the market.

RETAIL COMPANIES BY EMPLOYEE BAND

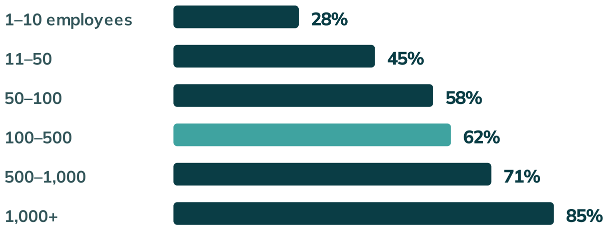
COMPANIES · MODELED UNIVERSE (TOTAL 21,762)



Source: supplied SalesGenie / Tier-4 market model. Percentages reproduced exactly as supplied.

ESTIMATED DATA / INTELLIGENCE ADOPTION

% OF COMPANIES · MODELED ESTIMATE



Source: Supplied market model. Adoption rates are modeled estimates, not official statistics.

EMPLOYEES	DATA OPPORTUNITY	EST. ADOPTION
1–10	Basic data	28%
11–50	Price / product	45%
50–100	Competitive monitoring	58%
100–500	**Retail intelligence**	**62%**
500–1,000	Enterprise intelligence	71%
1,000+	Full-scale intelligence	85%

DATADWIP TARGETING HYPOTHESIS

100–500

EMPLOYEES PER COMPANY

Enough budget, enough locations and enough complexity — but rarely enough internal data infrastructure.

- **Multiple locations**
- **Technology adoption**
- **Budget available**
- **Competitive pressure**
- **Operational complexity**
- **External intelligence need**

DATADWIP ASSESSMENT

The 100–500 employee segment represents the strongest balance between scale, technology adoption, budget, multiple locations and competitive pressure. This is a strategic targeting hypothesis, not an official industry classification.

SUPPORTING INDICATOR · RETAIL EMPLOYMENT

BLS reported approximately 15.46M retail-trade employees in May 2026 (15.20M in 2024; 15.40M in 2025; 15.28M in March 2026; 15.44M in April 2026), essentially flat on the month with a 1,100-job decline. Retail is not experiencing an employment collapse. *Interpretation:* the industry appears to be moving toward more technology and greater productivity per employee — employment data alone does not prove automation adoption.

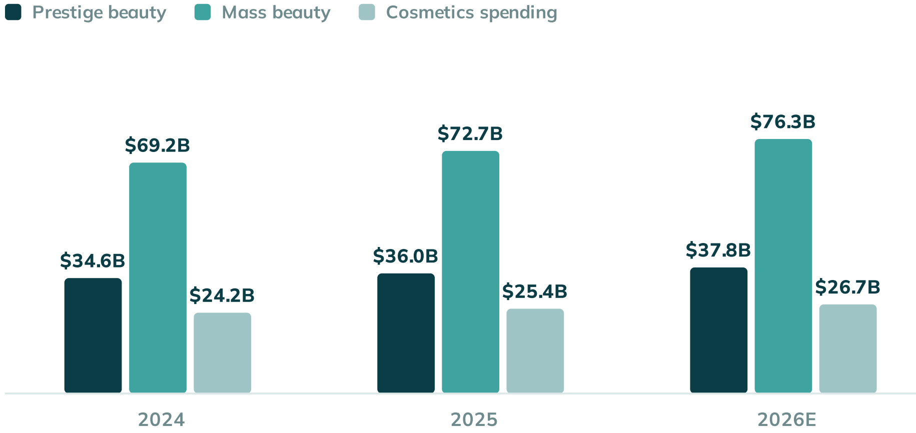
BEAUTY & COSMETICS

A $114.1B market by 2026E

Total U.S. beauty: $103.8B → $108.7B → $114.1B (2024–2026E), growing an estimated 5% a year.

U.S. BEAUTY MARKET BY SEGMENT

USD BILLIONS



Source: Circana; supplied market model. 2026E values are estimates.

METRIC	2024	2025	2026E	GROWTH
Prestige Beauty	$34.6B	$36.0B	$37.8B	+5% Est.
Mass Beauty	$69.2B	$72.7B	$76.3B	+5% Est.
Total Beauty	**$103.8B**	**$108.7B**	**$114.1B**	**+5% Est.**
Cosmetics Spending	$24.2B	$25.4B	$26.7B	+5% Est.

Circana reported 2025 U.S. prestige beauty sales of $36B (+4%) and mass beauty of $72.7B (+5%).

+6%
Q1 2026 PRESTIGE BEAUTY GROWTH · $8.1B

+7%
Q1 2026 MASS BEAUTY GROWTH · $18.1B

BEAUTY SEGMENT SALES

Q1 2026 VS H1 2025 BENCHMARK · USD BILLIONS

Source: Circana, Q1 2026 and H1 2025.

INTELLIGENCE CHALLENGES

WHY BEAUTY IS DATA-INTENSIVE

- **Fast product launches**
- **High SKU counts**
- **Frequent promotions**
- **Price sensitivity**
- **Strong online competition**
- **Rapid trend cycles**

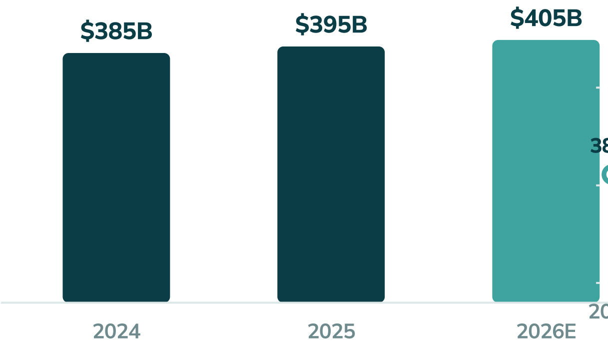
DATADWIP FIT VERY HIGH

FASHION & APPAREL

Market size → e-commerce → physical retail → intelligence need

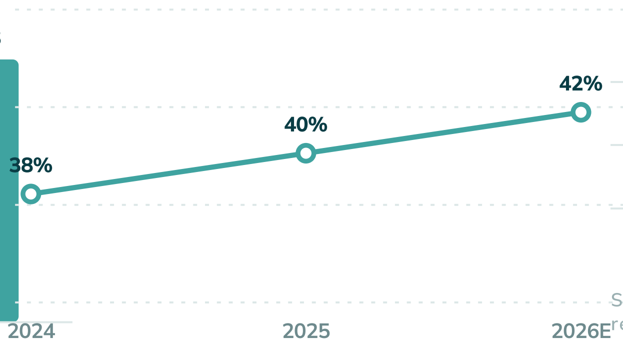
A $405B market by 2026E, with digital penetration approaching half of category sales.

FASHION & APPAREL MARKET SIZE
USD BILLIONS



Source: Supplied market model.

E-COMMERCE PENETRATION, FASHION
% OF CATEGORY SALES



Source: Supplied market model. Channel shares reproduced exactly as supplied.

METRIC	2024	2025	2026E
Market size	$385B	$395B	$405B
E-commerce penetration	38%	40%	42%
Brick-and-mortar	62%	65%	68%
Off-price growth	+8%	+10%	+12%
Warehouse clubs	+6%	+7%	+8%

Source: supplied Campaign 2 market model. Channel shares are reproduced exactly as supplied and do not sum to 100%.

KEY INSIGHT

Digital players, off-price retailers and warehouse clubs are gaining share while traditional department stores face pressure. Fashion is becoming increasingly dependent on price, assortment, inventory, promotions and location.

COMPETITIVE INTELLIGENCE NEED
FIVE MONITORING PRIORITIES

- Price
- Assortment
- Inventory
- Promotions
- Location

High SKU velocity, deep promotional calendars and rapid assortment turnover.

DATADWIP FIT VERY HIGH

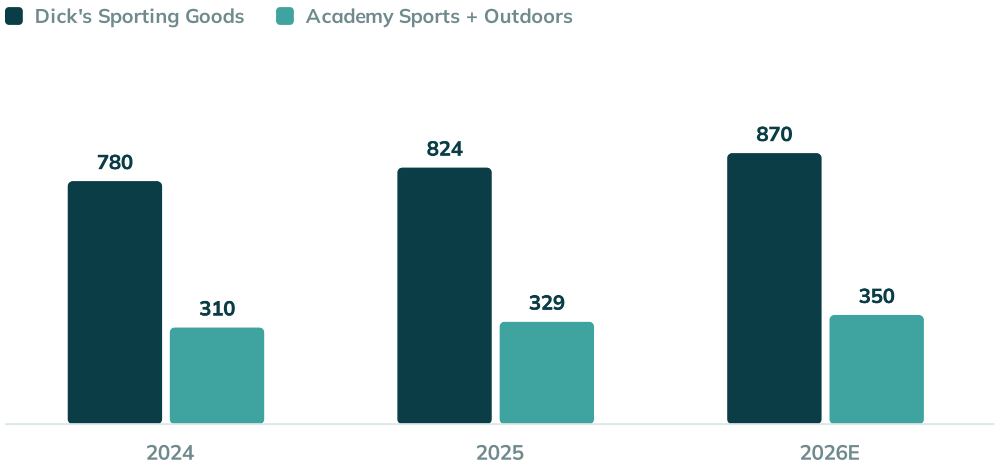
SPORTING GOODS

Store network expansion drives location intelligence

Total sporting-goods stores: 1,598 → 1,643 → 1,690 (2024–2026E).

STORE COUNTS OF LEADING SPORTING-GOODS RETAILERS

STORE LOCATIONS



Source: Supplied market model. 2026E store counts are estimates.

+46
DICK'S PROJECTED ADDITIONAL LOCATIONS, 2026E

+21
ACADEMY PROJECTED ADDITIONAL LOCATIONS, 2026E

1,690
TOTAL SPORTING-GOODS STORES, 2026E

WHERE THE INTELLIGENCE DEMAND SITS

EXPANSION-DRIVEN REQUIREMENTS

- Store expansion
- Competitor mapping
- Local pricing
- Product availability
- Store-location intelligence
- Regional market analysis

KEY INSIGHT

Rapid store expansion creates demand for competitor mapping, local pricing, product availability, store-location intelligence and regional market analysis.

DATADWIP FIT HIGH

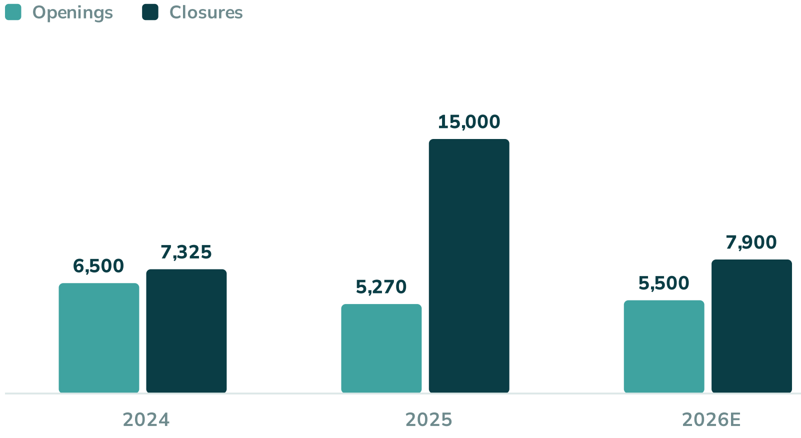
THE RETAIL STORE NETWORK IS CONSTANTLY CHANGING

Openings, closures and quarterly churn, 2024–2026E

2025 recorded a sharp increase in retail closures — a ~105% increase versus 2024 in the supplied model.

U.S. RETAIL STORE OPENINGS VS CLOSURES

STORE LOCATIONS



Source: Coresight Research Store Tracker; supplied market model. 2024 openings and 2026E values are estimates.

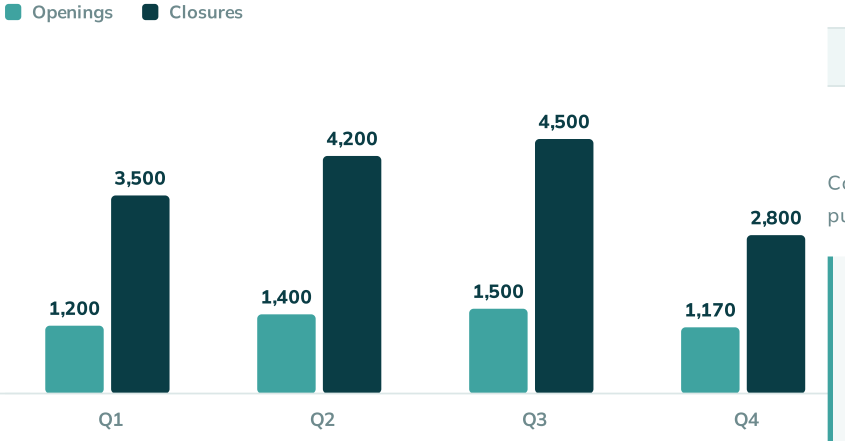
5,270
2025 OPENINGS

15,000
2025 CLOSURES

–9,730
2025 NET MODELED CHANGE

QUARTERLY STORE OPENINGS AND CLOSURES, 2025

STORE LOCATIONS



Source: Supplied Campaign 2 market model.

QUARTER	OPENINGS	CLOSURES	NET
Q1	1,200	3,500	-2,300
Q2	1,400	4,200	-2,800
Q3	1,500	4,500	-3,000
Q4	1,170	2,800	-1,630
FY 2025	**5,270**	**15,000**	**-9,730**

YEAR	OPENINGS	CLOSURES	NET
2024	~6,500 Est.	7,325	–825
2025	**5,270**	**15,000**	**–9,730**
2026E Proj.	~5,500	~7,900	–2,400

Coresight's Store Tracker tracks U.S. retail openings and closures and publishes 2025 reviews plus 2026 projections.

KEY INSIGHT

A competitor map created in January can become outdated before the year ends. Every quarter of 2025 was net negative, peaking in Q3 at –3,000 locations. Location intelligence needs to become continuous, not annual.

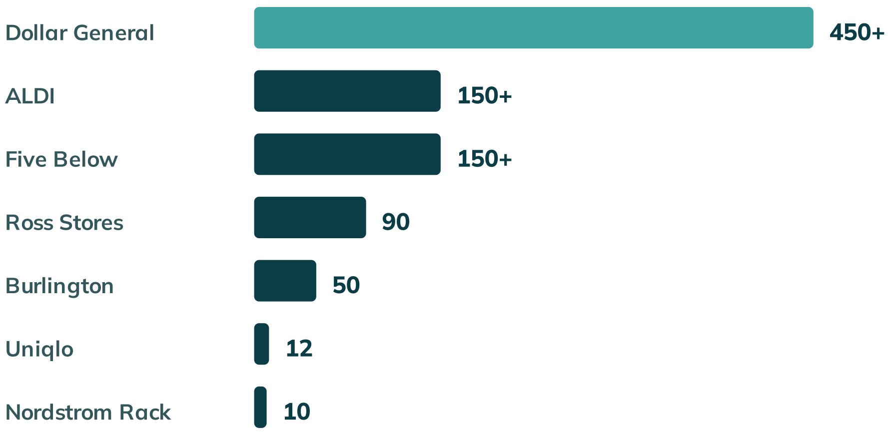
2026 STORE EXPANSION WATCHLIST

Planned openings by retailer

Every new location changes the competitive environment around it.

PLANNED 2026 STORE OPENINGS

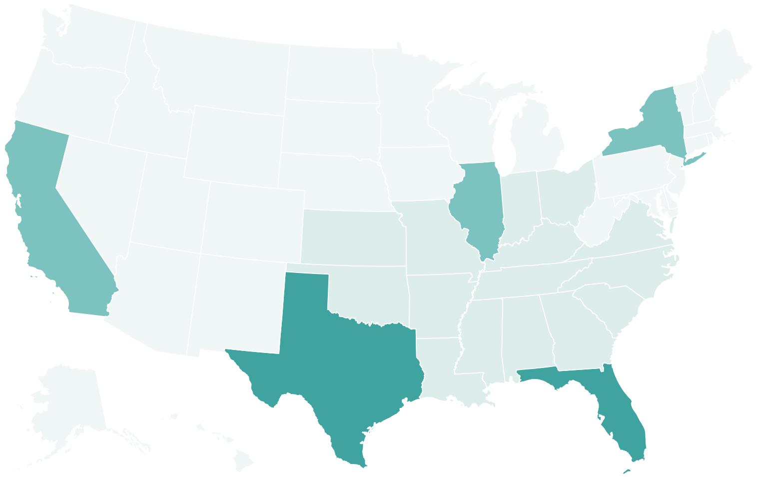
LOCATIONS · BY RETAILER



Source: Supplied Campaign 2 market model. Burlington shown at the top of its 40–50 range; Uniqlo 10–12; Nordstrom Rack 8–10.

WHERE EXPANSION PRESSURE CONCENTRATES

PRIORITY RETAIL MARKETS · MODELED



Illustrative geographic emphasis based on the priority states in the supplied model; individual retailer store lists are not state-attributed in the source data.

EVERY NEW LOCATION CREATES

FIVE DOWNSTREAM EFFECTS

- **A new competitor**
- **A new pricing environment**
- **A new market**
- **A new customer opportunity**
- **A new data requirement**

RETAILER IMPLICATION

Planned openings are published once. Their competitive consequences unfold continuously — which is why location intelligence has to be monitored, not filed.

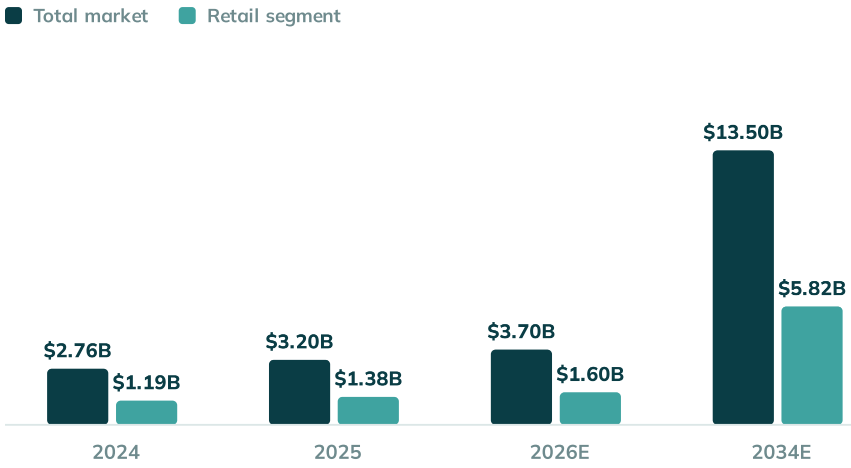
THE PRICE INTELLIGENCE MARKET

From $2.76B to a projected $13.50B

Competitive intelligence has become its own software category — and retail is its largest segment.

PRICE-INTELLIGENCE SOFTWARE MARKET

USD BILLIONS · 2024–2034E



Source: Market Intelo. 2026E and 2034E are projections.

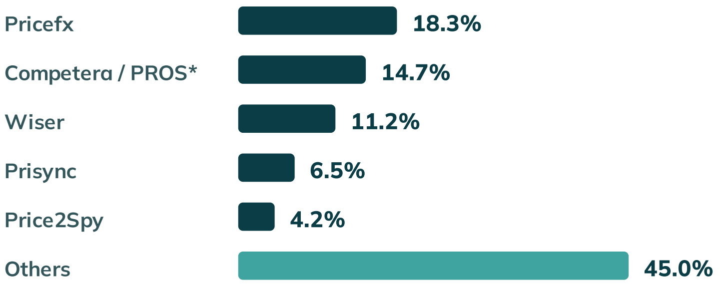
$3.70B
2026E GLOBAL PRICE-INTELLIGENCE SOFTWARE MARKET

$1.60B
2026E RETAIL SEGMENT · 43%+ OF THE MARKET

16.8%
PROJECTED CAGR THROUGH 2034

PRICE-INTELLIGENCE VENDOR SHARE

% OF MARKET



Source: Market Intelo.

FLAGGED FOR VERIFICATION

*Vendor classification/name should be checked against the specific Market Intelo edition before publication. Flagged rather than corrected.

THE MID-MARKET GAP

WHERE THE WHITESPACE SITS

SMB tooling
Under $5K per year

Mid-market · opportunity gap
$20K–$100K per year

Enterprise platforms
$100K+ per year

KEY INSIGHT

Retailers increasingly need intelligence across price, product, promotion, availability, location and marketplace. That moves the opportunity beyond simple web scraping — it becomes retail intelligence infrastructure.

THE NEW RETAIL INTELLIGENCE LAYER

What retailers actually need

Eight connected intelligence domains, monitored continuously rather than compiled annually.

01
Price intelligence
Competitor price tracking

02
Product intelligence
Product / SKU monitoring

03
Catalog intelligence
Assortment changes

04
Location intelligence
Store openings and closures

05
Marketplace intelligence
Amazon / Walmart / marketplace monitoring

06
Inventory intelligence
Stock availability

07
Promotion intelligence
Discounts and campaigns

08
Brand intelligence
Competitor brand activity

Retailers do not simply need more data.
They need connected intelligence across the market.

DATA SIGNAL

Each domain on its own is a feed. Together they describe a market — what is being sold, at what price, where, by whom, and with what availability.

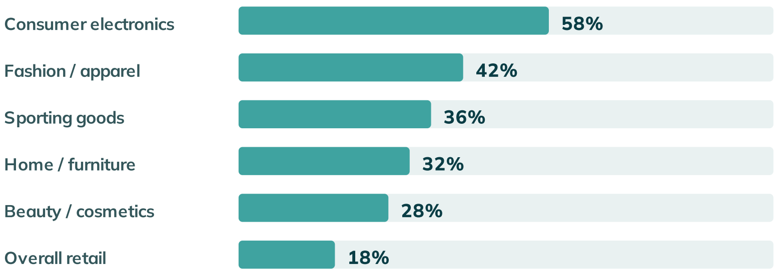
THE RETAILER IS NOW PHYSICAL + DIGITAL + OMNICHANNEL

Penetration by category and fulfilment models

U.S. e-commerce reached 16.9% of total retail sales in Q1 2026 while growing 9.8% YoY.

E-COMMERCE PENETRATION BY CATEGORY

% OF CATEGORY SALES, 2026E



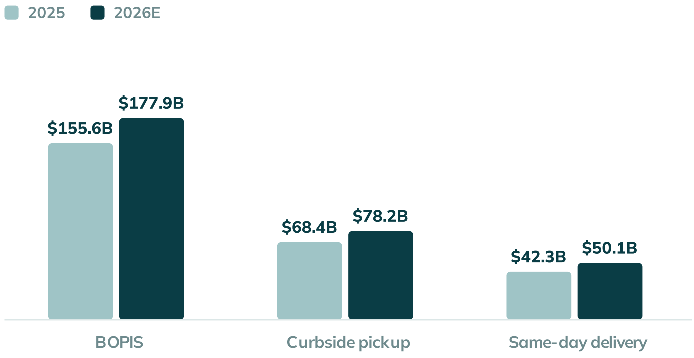
Source: Supplied market model; U.S. Census Bureau. 2024 → 2026E series: beauty 24→28%, fashion 38→42%, sporting goods 32→36%, home 28→32%, electronics 52→58%, overall retail 16.4→18.0% Est.

KEY INSIGHT

Consumer electronics is the highest-penetration category at an estimated 58% in 2026. Retail is physical, digital and omnichannel simultaneously, so intelligence must cover both sides.

OMNICHANNEL FULFILMENT VALUE

USD BILLIONS



Source: Supplied Campaign 2 market model.

+14.3%
BOPIS AND CURBSIDE GROWTH, 2026E

+18.4%
SAME-DAY DELIVERY GROWTH, 2026E

METRIC	2025	2026E	CHANGE
Online + in-store shoppers	89%	91%	+2 pts
Omnichannel spend uplift	+16%	+18%	+2 pts

> **"The customer doesn't think in channels. They think: *Can I get the product, at the right price, where I want it?*"**
>
> Core insight

Online → Product → Price → Inventory → Store → Location

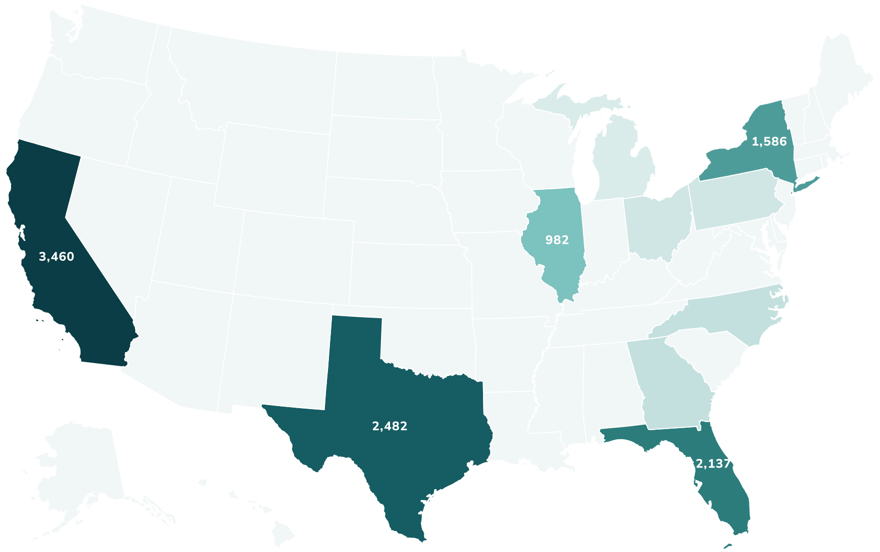
U.S. GEOGRAPHIC OPPORTUNITY

Where the modeled retail universe concentrates

California, Texas, Florida, New York and Illinois represent a significant concentration of the modeled retail-company universe.

RETAIL COMPANIES BY STATE

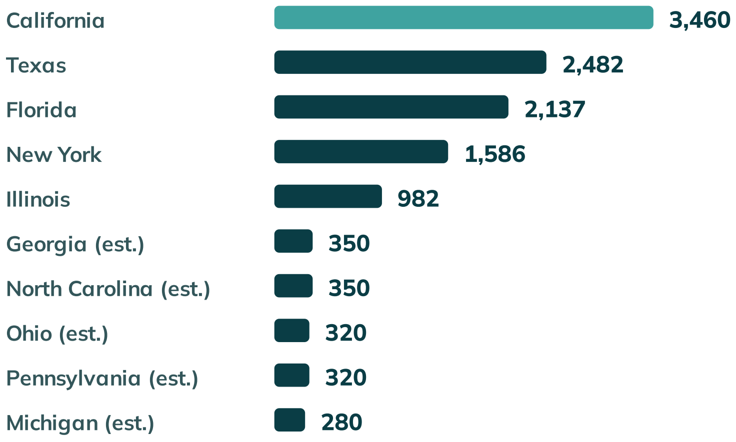
COMPANIES IN THE MODELED UNIVERSE · TOP FIVE HIGHLIGHTED



Source: Supplied SalesGenie / Tier-4 market model. Modeled values — not official government statistics.

RANKED MARKET SIZE

COMPANIES



Georgia through Michigan are estimated mid-market company counts and are not directly comparable with the top five totals.

STATE	COMPANIES	% OF TOTAL
California	**3,460**	**15.9%**
Texas	2,482	11.4%
Florida	2,137	9.8%
New York	1,586	7.3%
Illinois	982	4.5%

LARGEST SINGLE-STATE CONCENTRATION

California

3,460 RETAIL COMPANIES · 15.9% SHARE OF THE MODELED UNIVERSE · 11,533 CONVENIENCE STORES

PRIORITY STATES

California, Texas, Florida, New York and Illinois should be prioritised in that order.

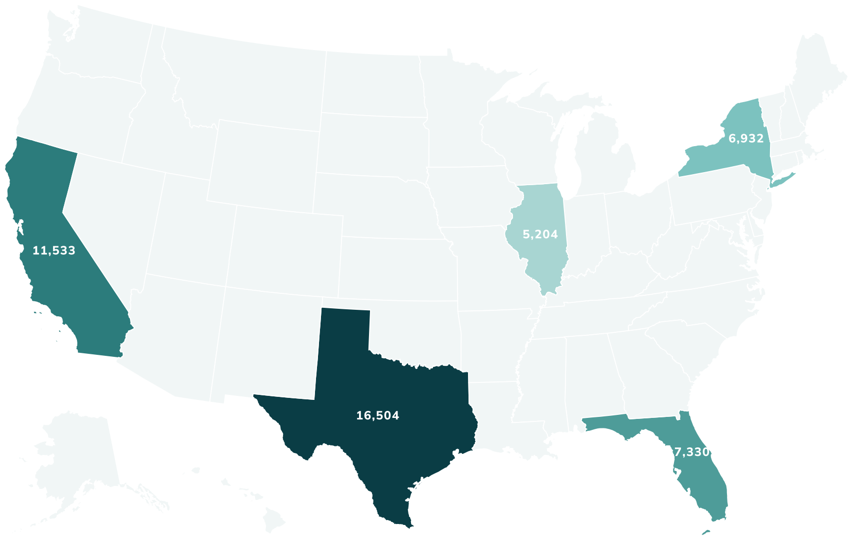
CONVENIENCE RETAIL

A supporting vertical opportunity

Convenience retail is highly location-dependent — a useful illustration of why geography drives intelligence needs.

CONVENIENCE STORES BY STATE

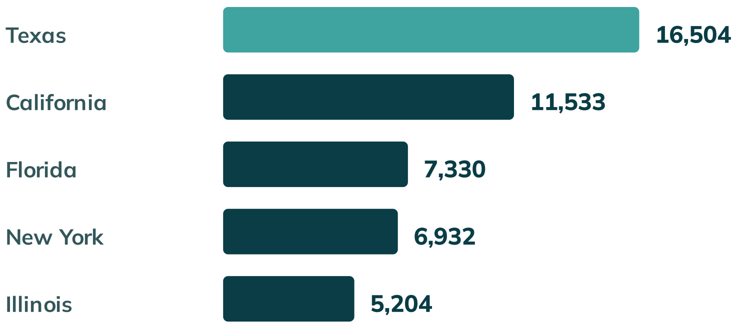
STORE COUNT · TOP FIVE STATES



Source: Supplied Campaign 2 market model. Convenience-store counts are a separate metric and are not directly comparable with retail-company counts.

RANKED STORE COUNTS

STORES



STATE	CONVENIENCE STORES	RANK
Texas	**16,504**	**#1**
California	11,533	#2
Florida	7,330	#3
New York	6,932	#4
Illinois	5,204	#5

LARGEST CONVENIENCE-RETAIL MARKET

Texas

16,504 CONVENIENCE STORES · #1 NATIONAL RANK · 2,482 RETAIL COMPANIES

WHY IT MATTERS

Competitive intelligence can monitor nearby competitors, new store openings, store closures, fuel pricing, product assortment, local promotions and regional expansion — all of which are inherently local.

Convenience retail is presented as a supporting vertical, not as the report's primary ideal customer profile.

WHO OWNS THE RETAIL INTELLIGENCE PROBLEM?

Different retail leaders experience different data-visibility problems

The same market complexity shows up differently depending on where a leader sits.

E-commerce Director
Product and price visibility across a growing digital assortment.

Merchandising Director
Margin pressure from competitor pricing and promotions.

Pricing Director
Competitor price changes that move faster than reporting cycles.

Marketing Director
Competitive blind spots and manual competitor research.

Real Estate Director
Expansion uncertainty as store networks shift.

Category Director
Assortment gaps against a moving competitive set.

Regional Director
Local competition that national dashboards do not capture.

One market, seven vantage points
Each role sees a fragment of the same underlying visibility gap.

RETAILER IMPLICATION

Retail intelligence is rarely owned by a single function. Pricing, merchandising, e-commerce, marketing, category and real-estate leaders each require a slice of the same continuously updated market picture.

DATA SIGNAL

Where those slices are assembled manually, the organisation is effectively paying for the same competitor research several times over — in different formats, at different refresh rates.

PERSONA → PAIN → INTELLIGENCE

Mapping the visibility gap to the data required

Read down the left column to find your role; read across for the intelligence that closes the gap.

EXECUTIVE	BUSINESS PROBLEM	INTELLIGENCE NEEDED
E-commerce Director	Product / price visibility	**Product + price intelligence**
Merchandising Director	Margin pressure	**Competitive pricing**
Pricing Director	Competitor price changes	**Real-time price monitoring**
Real Estate Director	Market expansion uncertainty	**Location intelligence**
Marketing Director	Competitive blind spots	**Brand + competitor intelligence**
VP Marketing	Manual competitor research	**Automated monitoring**
Category Director	Assortment gaps	**Catalog intelligence**
Regional Director	Local competition	**Regional intelligence**

THE READER TEST

"This problem is relevant to my role."

KEY FINDING

Every function in the list is trying to answer a version of the same question: what has changed in my market since the last time anyone checked?

Personas are presented as an industry observation of where retail data-visibility problems sit, based on the roles most commonly responsible for pricing, assortment, expansion and competitive monitoring decisions.

THE DATADWIP OPPORTUNITY

From fragmented data to structured intelligence

Retailers don't have a data shortage. They have a data intelligence problem.

Retailers already have access to a large volume of public market information. What they lack is a way to collect it consistently, structure it, and keep it current.

RETAILERS ALREADY HAVE

AVAILABLE PUBLIC SOURCES

- WEBSITES
- MARKETPLACES
- STORE NETWORKS
- COMPETITOR WEBSITES
- PRODUCT CATALOGS
- PRICING FEEDS
- PUBLIC BUSINESS INFORMATION

But the information is fragmented.

DATADWIP POSITIONING

DataDwip turns fragmented public data into structured intelligence.

“We don't just collect retail data. We build the data layer retailers need to understand their market.”

Continuous

MONITORING INSTEAD OF PERIODIC RESEARCH

Structured

NORMALISED, VALIDATED AND DEDUPLICATED

Public

SOURCED FROM OPENLY AVAILABLE MARKET INFORMATION

Custom

CONFIGURED TO THE RETAILER'S COMPETITIVE SET

DATADWIP RETAIL INTELLIGENCE STACK

Four levels from public data to business action

LEVEL 1	**Data collection**	Websites · Marketplaces · Store locators · Product catalogs · Competitor sites
LEVEL 2	**Data processing**	Extraction · Cleaning · Normalization · Deduplication · Validation
LEVEL 3	**Intelligence**	Price · Product · Location · Brand · Marketplace intelligence
LEVEL 4	**Business action**	Pricing decisions · Market expansion · Competitor monitoring · Assortment optimization · Sales & marketing intelligence

OPPORTUNITY

The value is not in any single level. It is in the continuity between them — collection that never stops, processing that keeps the data comparable, and intelligence that arrives in time to act on.

WHY NOW?

Three converging market forces

01

E-commerce is growing faster than total retail

Q1 2026 e-commerce grew 9.8% YoY, compared with 3.9% growth in total retail sales.

+9.8% vs +3.9%

Source: U.S. Census Bureau, 2026

02

Physical retail remains enormous

The vast majority of retail activity still involves physical stores, creating a need to connect online and offline intelligence.

82.9% 2026E brick-and-mortar share

Source: U.S. Census Bureau, 2026; supplied market model

03

Competitive intelligence is becoming a software category

Price-intelligence software is estimated to grow from $3.2B in 2025 to $13.5B by 2034.

$3.2B → $13.5B

Source: Market Intelo

The opportunity sits at the intersection of all three: a large physical base, a faster-growing digital layer, and a formalising intelligence software market.

KEY INSIGHT

None of these forces is new on its own. What is new is that all three are measurable in the same dataset, at the same time, for the same retailer.

MARKET OPPORTUNITY SCORECARD

DataDwip strategic assessment

Subjective segment scoring by the DataDwip Research Team — not official market statistics.

SEGMENT	MARKET GROWTH	COMPETITION	DATA NEED	DATADWIP FIT
Beauty	★★★★★	★★★★★	★★★★★	★★★★★
Fashion	★★★★☆	★★★★★	★★★★★	★★★★★
Sporting Goods	★★★★☆	★★★★☆	★★★★☆	★★★★☆
Specialty Food	★★★★☆	★★★★☆	★★★★☆	★★★★☆
Pet Retail	★★★★☆	★★★★☆	★★★★☆	★★★★☆
Home / Furniture	★★★☆☆	★★★★☆	★★★★☆	★★★☆☆
Consumer Electronics	★★★☆☆	★★★★★	★★★★★	★★★☆☆

DataDwip Strategic Assessment. Five-star scale; scores express relative attractiveness, not measured market values.

THE MULTI-LOCATION RETAILER PROFILE MOST EXPOSED TO DATA COMPLEXITY

PROFILE CHARACTERISTICS

Company size	**100–500 employees**
Store network	**50–200+ physical locations**
Industries	**Beauty · Fashion · Sporting goods · Specialty retail · Pet · Food**
Geography	**United States**
Digital presence	**Strong e-commerce plus a physical store network**
Business challenge	**Competitive pricing, product monitoring and location intelligence**

DATADWIP ASSESSMENT

Exposure to data complexity rises with the number of locations, the depth of the assortment and the intensity of local price competition — not with company revenue alone.

FINAL MARKET CONCLUSION

Scale alone is no longer enough

The U.S. retail market is entering a period where retailers must understand the market around them continuously.

What competitors are selling.

Where competitors are expanding.

What competitors are charging.

Which products are gaining traction.

Where inventory is available.

Which markets are becoming crowded.

Where opportunities are opening.

That requires continuous, structured and reliable data.

This is the opportunity for DataDwip.

KEY FINDING

Every question on this page is answerable from public market information. What makes them hard is frequency: the answers change faster than most retailers refresh them.

KEY TAKEAWAYS

The report in twelve numbers

MARKET

$7.99T
ESTIMATED 2026 U.S. RETAIL MARKET

$3.7B
ESTIMATED 2026 PRICE-INTELLIGENCE MARKET

16.8%
PROJECTED PRICE-INTELLIGENCE CAGR

DIGITAL

$326.7B
Q1 2026 U.S. E-COMMERCE

+9.8%
Q1 2026 E-COMMERCE GROWTH

16.9%
Q1 2026 E-COMMERCE SHARE

PHYSICAL RETAIL

15,000
2025 MODELED STORE CLOSURES

5,270
2025 OPENINGS

~9,730
NET MODELED REDUCTION

BEAUTY

$108.7B
2025 BEAUTY MARKET

+6%
Q1 2026 PRESTIGE GROWTH

+7%
Q1 2026 MASS GROWTH

Sources: U.S. Census Bureau; Circana; Market Intelo; Coresight Research; supplied Campaign 2 market model. Estimates and modeled values are labelled throughout the report.

SOURCES & METHODOLOGY

Source hierarchy and data currency

SOURCE HIERARCHY

FOUR TIERS

TIER	SOURCE TYPE	EXAMPLES
Tier 1	Official / primary	**U.S. Census Bureau · BLS · SEC**
Tier 2	Major research	**Circana · NRF · Deloitte · McKinsey**
Tier 3	Industry research	**Coresight Research · Market Intelo**
Tier 4	Commercial data	**SalesGenie · Apollo · ZoomInfo**

SOURCE QUALITY

Tier 3 and Tier 4 data are industry and commercial sources. They are not official statistics and are labelled as estimates or modeled values wherever used in this report.

PRIMARY SOURCES USED FOR THIS UPDATE

SIX SOURCES

U.S. Census Bureau
Retail sales · Quarterly e-commerce

U.S. Bureau of Labor Statistics
Retail-trade employment

Circana
U.S. prestige and mass beauty

Coresight Research
Store Tracker — openings and closures

Market Intelo
Price-intelligence software market

SalesGenie / commercial data
Company counts and firmographics

DATA CURRENCY

WHICH PERIOD PLAYS WHICH ROLE

2026	Latest market signals / current trends
2025	Full-year benchmark
2024	Historical comparison
2026E	Forecast / modeled estimates
2034E	Long-term market forecast

OFFICIAL · E = ESTIMATE / PROJECTION · MODELED · DATADWIP ASSESSMENT

E = Estimate / Projection. All estimates are visually distinguished from official historical data throughout this report.

METHODOLOGY, LIMITATIONS & REPORT CARD

How the figures in this report should be read

This report combines official statistics, industry research, commercial datasets, market estimates and modeled assumptions. Figures drawn from official releases are cited inline; everything else is tagged.

MODELED RATHER THAN OFFICIAL

TREAT AS ESTIMATES

- **Retailer counts by employee size**
- **Companies with 50–200 locations**
- **State-level employee segmentation**
- **Web-scraping adoption**
- **Location and geographic segmentation**
- **Market estimates and forecasts**

IMPORTANT LIMITATION

No official dataset currently provides the complete cross-tabulation of Industry × Employees × Locations × Geography × Decision-makers. Modeled segmentation in this report should therefore be treated as a market model, not a census of the market.

IMPORTANT

Where information is uncertain, ambiguous or supplied from a third-party model, it is flagged rather than corrected. See the vendor-classification flag in the price-intelligence section and the market-definition note in the market-size section.

Disclaimer: This report contains historical statistics, third-party market estimates, modeled assumptions and forward-looking projections. Forecasts and modeled outcomes are not guarantees of future performance. Market definitions may differ across sources; figures should therefore be compared only where methodologies are consistent.

RETAIL INTELLIGENCE REPORT CARD

U.S. MULTI-LOCATION RETAIL · EXECUTIVE DASHBOARD

MARKET	$7.99T	2026E U.S. RETAIL MARKET
PRICE INTELLIGENCE	$3.7B	2026E ESTIMATED MARKET
E-COMMERCE	$326.7B	Q1 2026
E-COMMERCE GROWTH	+9.8%	Q1 2026 YOY
STORE CLOSURES	15,000	2025 SUPPLIED MARKET MODEL
BEAUTY	$108.7B	2025 MARKET

DataDwip

Retail is becoming an intelligence-driven industry.

Price	Product	Competitor	Store	Customer	Market

The winners will not simply be the retailers with the most stores, products or customers. They will be the retailers that can see market changes faster.

Price changes. Product changes. Competitor changes. Store changes. Customer changes. Market changes.

DataDwip's opportunity is to turn those changes into usable intelligence.

PREPARED BY	REPORT	RESEARCH DATE	DATA COVERAGE	NEXT UPDATE
DataDwip Research Team	US Multi-Location Retail Intelligence	August 14, 2026	2024–2026	Q4 2026