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McKinsey says AI could add €320 billion to European retail

The report warns that retailers risk losing relevance as AI reshapes product discovery, pricing and recommendations for wine, beer and spirits

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Artificial intelligence could generate €240 billion to €320 billion in economic value for European retail over the next five years, according to a new report by McKinsey & Company and EuroCommerce, a finding that carries direct implications for how wine, beer and spirits are discovered, promoted and sold across the region.

The report, “Rewiring Retail in Europe: The AI Imperative,” says the technology is moving from experimentation to a broader restructuring of retail business models, operating systems, staffing needs and customer experience. It also says most retailers have not yet turned AI spending into measurable financial gains, even as executives increasingly see the technology as necessary to remain competitive.

That tension is central to the report’s message. Retailers are no longer debating whether to adopt AI, the authors say. The question now is whether they can deploy it at scale fast enough to avoid losing relevance as consumers change how they search for and compare products.

For alcoholic beverages, that shift matters because product discovery has long depended on shelf placement, packaging, price tags, store staff recommendations and brand recognition. The report says 61% of European consumers already use AI to discover or evaluate products. In beverage categories where shoppers often seek guidance on taste, food pairing, price range, origin or occasion, that means recommendation engines, shopping assistants and automated search tools may increasingly shape what ends up in the cart.

The change could be especially significant for wine, craft beer, premium spirits and niche liqueurs, where consumer choice is broad and product information can be complex. A shopper looking for a bottle for dinner, a gift whiskey under a set budget or a gin suited to cocktails may rely less on browsing and more on AI-generated suggestions. That gives retailers and digital platforms more influence over which labels gain visibility.

The report identifies 10 shifts likely to define AI’s role in European retail in the coming years. Among them is what it describes as “agentic commerce,” which could become the biggest structural change since e-commerce. Fully autonomous shopping remains limited, but the report argues that consumer use of AI for product discovery already

signals a deeper change in how demand is created and captured.

It also says a full AI transformation could add between four and 10 percentage points to operating profit through revenue growth, margin improvement and productivity gains. Yet only 15% of retailers are focusing investment on the commercial areas where the report sees the highest value, including pricing, promotions, assortment optimization and supplier negotiations.

Those are areas with immediate consequences for alcohol producers and distributors. In wine, beer and spirits, promotional pricing, seasonal campaigns, volume discounts and negotiations with supermarket chains are central parts of the business. If retailers use AI more effectively to forecast demand, test price sensitivity and refine assortments by store or channel, suppliers may face tougher negotiations and more data-driven decisions about which products stay on shelves or appear in digital recommendations.

The report says AI transformation usually requires sustained capital and operating spending equal to 1.5% to 5% of revenue, depending on company size, maturity and ambition. Even so, eight in 10 retail executives surveyed said it is still too early to determine AI's impact on EBITDA. McKinsey and EuroCommerce describe that as evidence of a large gap between ambition and execution.

Holger Harreis, a senior partner at McKinsey and co-leader of its global data initiatives, said European retail has a €240 billion to €320 billion AI opportunity but that most companies still struggle to convert investment into measurable results. He said consumer behavior is already changing faster than many organizations are adapting.

"The technology is no longer the obstacle," Harreis said in a statement released with the report. "The question is whether retailers can rewire their organizations quickly enough to scale AI and capture its value before the market moves past them."

Christel Delberghe, director general of EuroCommerce, said retailers across Europe are already investing in innovation and implementation. She said companies are deploying advanced technologies across the value chain, from product discovery to supply chains, with the aim of improving efficiency and customer experience. The challenge now, she

said, is turning that momentum into consistent and measurable impact by scaling AI across operations.

For beverage companies, one practical consequence is that product data may become more important than ever. To be surfaced by AI systems, bottles may need more than a basic listing in a retailer’s catalog. Clear information on style, flavor profile, origin, alcohol level, format, food pairings, sustainability claims, awards, availability and price may increasingly determine whether a product appears in search results or recommendation feeds.

That could create both opportunity and risk for smaller producers. Independent wineries, craft brewers and artisanal distillers could benefit if AI tools match their products with consumers whose preferences fit those offerings. At the same time, algorithms may favor products with stronger sales histories, better stock availability, richer data sets or closer commercial ties with major retailers. In practice, competition for shelf space may expand into competition for algorithmic placement.

The report also says the biggest barriers to successful AI deployment are organizational rather than technical. Poor change management, legacy workflows, fragmented data and talent shortages remain major obstacles. Retailers that perform best are not necessarily those running the most pilot projects. Instead, the report says they focus investment on a smaller number of high-value business domains while redesigning workflows, capabilities, governance and operating models around enterprise-wide adoption.

That point matters for beverage suppliers because it suggests retailers will increasingly expect partners to support more structured data sharing and clearer proof of commercial performance. Brand heritage or perceived quality alone may carry less weight if buyers can compare conversion rates, repeat purchases, margins and channel-specific performance with greater precision.

The report also says up to 75% of jobs in retail could change as AI spreads across organizations. Human work would shift more toward oversight, coordination, judgment and higher-value decision-making. In beverage retailing that could affect category managers, e-commerce teams, pricing specialists and store staff who now play an

important role in guiding purchases.

The impact is likely to extend beyond supermarkets. Online wine shops, convenience chains, duty-free stores, delivery apps and marketplaces all operate in categories where recommendation plays an outsized role. Consumers often ask simple but specific questions when buying alcohol: what wine goes with fish; what beer suits spicy food; what bourbon makes a good gift; what sparkling wine fits a budget. Those are exactly the kinds of queries AI systems are designed to answer quickly.

There is also a regulatory dimension for alcohol that does not apply in quite the same way to many other retail categories. More personalized recommendations could help retailers provide clearer information about alcohol content or highlight lower-alcohol options. But automated promotion in a regulated category also raises questions about targeting practices, responsible consumption and ethical limits on recommendation systems.

McKinsey and EuroCommerce say retailers should now focus on five priorities: defining a clear AI value map; preparing for agent-based shopping; redesigning operating models around AI; taking a disciplined approach to investment; and preparing workers for an AI-native future.

For Europe’s alcohol sector, those priorities point to a broader shift in power inside retail. As AI becomes more embedded in pricing systems, digital storefronts and recommendation tools, it may play a larger role in deciding which wines, beers and spirits consumers see first, compare most easily and ultimately buy.