4th edition

Retail Report 2026

OBSERVATOIRE NATIONAL DES PME
LUXEMBOURG

LE GOUVERNEMENT DU GRAND-DUCHÉ DE LUXEMBOURG
Ministère de l'Économie

CHAMBER OF COMMERCE LUXEMBOURG
POWERING BUSINESS

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SERVICES • COMMERCE • TRANSPORT

HORESCA
LUXEMBOURG

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Retail Report 2026,
4th edition

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688,460
Population (2025)

+64,5 %
Population growth since 2000

489,000
Employees (2025)

235,900
Non-resident cross-border workers (2024) → **48.2 %** **of employees**

54,600
Employees in the retail sector (2024) → **11.2 %** **of employees**

8,537 M €
Retail trade turnover → **+7.1 %** **compared to 2023**

41,785 €
Purchasing power per capita (2024) → **21,008 €** **EU-27 average**

12,518 €
Retail **purchasing power** per capita (2025) → **± 30 %** **of total purchasing power**

7.5 %
Share of trade in total gross value added (2025) → **9.7 %** **in 2015**

Key figures

23,900
Employees in the Horeca sector (2024) → **+4.9%** **of employees**

3,6 M
Overnight stays (2024) → **+24,5%** Compared to the **previous year**

Chiffres de Statec

Ranking in 2024 (2023)	Country	Population	Purchasing power per capita (€)	Purchasing power index (EU-27)
1 (1)	**Luxembourg**	**672.100**	**41.785**	**198,9**
2 (2)	Denmark	5.961.249	31.162	148,3
3 (4)	Austria	9.170.647	29.056	138,3
4 (5)	Germany	84.669.326	27.746	132,1
5 (7)	Netherlands	17.942.942	27.558	131,2
6 (6)	Belgium	11.763.650	27.270	129,8
7 (3)	Ireland	5.396.554	26.880	127,9
8 (8)	Finland	5.603.851	24.872	118,4
9 (10)	France	68.373.433	24.328	115,8
10 (9)	Sweden	10.551.707	23.411	111,4
	EU-27 (TOTAL)	**452.002.652**	**21.008**	**100,0**

Source : © GFK und NielsenIQ: Einzelhandel Europa 2024 und 2025

01 | Foreword

In a country marked by sustained population growth and rapidly changing consumption patterns, driven by economic, technological, and societal transformations, having access to solid and up-to-date analyses is essential to understand these dynamics and respond to them appropriately.

The Retail Report 2026 highlights several significant developments in Luxembourg's commercial landscape. Sales areas per capita now stands at 1.58 m^2, its lowest level since the first data collection began in 2019. This development results both from continuous population growth and from the expansion of e-commerce, whose space requirements are more limited, and which is putting pressure on certain brick-and-mortar retail segments, particularly in the fashion and consumer electronics sectors.

The report also points to a gradual transformation in the structure and location of commercial activities. While the total number of points of sale has remained broadly stable for several years, developments vary significantly across sectors. Food retail continues to show strong momentum, both in the number of establishments and in sales areas, with growth exceeding that of the population. At the same time, the Horeca sector, particularly fast food, is experiencing marked expansion and is occupying an increasing share of commercial space, especially in city center and village centers.

These developments reflect a gradual reshaping of urban centers, where traditional retail functions increasingly coexist with uses related to food services, services more broadly, and social or community spaces. This diversification is part of a wider European trend. Retail and the Horeca sector play a central role in the vitality of our city and village centers, contributing to social interaction, local activity, and the attractiveness of our territories.

More than a simple overview, the Retail Report is a genuine decision-support tool for retailers, municipalities, and public authorities. The report's findings call for responses that are as closely aligned as possible with local realities. The government remains fully committed to supporting businesses and municipalities in this phase of transformation, notably through targeted support measures, data-driven policies, and particular attention to the vitality of the retail sector.

Finally, I would like to commend the work of the Observatoire national des PME, as well as all project partners, whose commitment helps to inform public action and support balanced and sustainable economic development in our country.

Lex Delles
Ministre de l'Économie, des PME,
de l'Énergie et du Tourisme

02 | Members of the GIE Observatoire national des PME

GIE Observatoire national des PME

This Economic Interest Group (GIE), initiated by the State, the Chamber of Commerce, and the Chamber of Skilled Trades and Crafts, aims to promote and support small and medium-sized enterprises in the retail and craft sectors. The Observatoire national des PME contributes in particular to the implementation of three major projects: the management of the Retail Cadastre, the opening of new regional offices of the House of Entrepreneurship, and the promotion of a national platform for business transfers.

Retail Cadastre

The Retail Cadastre, implemented at national level, provides an overview of the structural evolution of various economic sectors, such as retail trade, food-related crafts, and the Horeca sector. Thanks to integrated GIS technology, Retail Cadastre data can be displayed spatially and visually on a map, analyzed, and linked to other market data. The tool is intended, among other things, to help municipalities better understand their own situation and support them in making appropriate decisions – whether in the areas of spatial planning, urban planning, city marketing, or business development.

Members of the GIE Observatoire national des PME

Ministry of the Economy

The Ministry of the Economy, the main point of contact for small and medium-sized enterprises, operates in several areas of responsibility, including business licensing and state aid for companies. With the High Committee for SMEs and the SME Action Plan, it also has instruments enabling it to pursue a horizontal policy approach in support of SMEs.

The Ministry of the Economy continuously seeks to optimize its work processes and provide excellent service to its beneficiaries.

More information: **www.meco.gouvernement.lu**

Chamber of Commerce

The Chamber of Commerce supports the creation, development, and international expansion of companies in the Grand Duchy of Luxembourg and represents their interests as an independent and official spokesperson.

Today, the Chamber of Commerce represents 90,000 affiliated companies, corresponding to 75% of salaried employment and 80% of Luxembourg's GDP. It brings together all Luxembourg companies except those in the craft and agricultural sectors. Through its actions, initiatives, and policy positions, the Chamber of Commerce consistently seeks to serve the collective interests of its members.

Sector-specific interests are considered only if they do not conflict with the interests of all affiliated companies.

More information: **www.cc.lu**

Chamber of Skilled Trades and Crafts

The Chamber of Skilled Trades and Crafts is a professional chamber whose main objectives are to represent and defend the interests of Luxembourg's craft sector.

As an elective body with mandatory membership, it is the institutional and official spokesperson for 8,500 craft enterprises employing 103,000 people. The Chamber represents all craft businesses, including those in the food sector; fashion, health, and hygiene; mechanical trades; construction (structural works and finishing); technical building equipment; communication, multimedia, art, and other activities.

More information: **www.cdm.lu**

Luxembourg Confederation

Luxembourg Confederation is an employers' organization dedicated to private enterprise, whose mission is to support, promote, and represent the interests of its member companies and its 23 affiliated sector federations at national and international level. The organization is active in the retail, transport, and services sectors.

Luxembourg Confederation is also a key interlocutor for all matters relating to the retail sector in the Grand Duchy. It develops networks, monitors and analyzes developments in retail trade, and works on various aspects of urban and commercial development. Through its involvement in the broader retail sector, the organization also operates in the field of city marketing and advises cities and municipalities on commercial site development.

More information: **www.confederation.lu**

Horesca

The National Federation of Hoteliers, Restaurateurs, and Cafetieres of the Grand Duchy of Luxembourg (HORESCA a.s.b.l.) represents businesses in the hotel, restaurant, and café sectors in Luxembourg. It brings together hotels, restaurants, cafés, brasseries, and other Horeca-sector stakeholders, and operates at both national and international level to promote innovation, quality, solidarity, and a favorable economic and social environment for hospitality and food-service businesses.

HORESCA's mission is to defend and promote the interests of its members, facilitate the operation of their businesses, and preserve the image and reputation of the profession. The federation provides day-to-day support in areas such as business management, recruitment, vocational training, compliance with health and safety standards, and administrative procedures.

More information: **www.horesca.lu**

Project Partners

LE GOUVERNEMENT
DU GRAND-DUCHÉ DE LUXEMBOURG
Ministère du Logement et de
l'Aménagement du territoire

Département de l'aménagement
du territoire

Ministry of Housing and Spatial Planning

The Department of Spatial Planning (DATer) of the Ministry of Housing and Spatial Planning is responsible for coordinating the territorial impact of government and municipal sectoral policies and, in cooperation with municipal stakeholders, combining socio-economic development with environmental protection and the preservation of natural resources. This involves safeguarding landscapes, enhancing the specific strengths of each region, and contributing both to the rational use of land and to the coordination of land-use needs.

Spatial planning aims to ensure optimal living conditions for residents by promoting the sustainable development of the country's different regions. It determines how development should be distributed across the territory in a fair and balanced way, with a focus on sustainability and territorial resilience.

DATer is actively involved in cooperation with the Observatoire national des PME on the topic of retail trade. As an important element in assessing the urban centrality of a given location, data on the retail sector provided by the SME Observatory are of great importance for spatial planning policy. In return, DATer provides the SME Observatory with data on soil sealing levels, accessibility, and overall urban centrality. In addition to commercial centrality, this overall index combines data relating to restaurants and accommodation, public facilities and services, healthcare and care services, educational and extracurricular provision, as well as cultural, sports, and leisure facilities.

More information: **www.amenagement-territoire.lu**

LE GOUVERNEMENT
DU GRAND-DUCHÉ DE LUXEMBOURG
Administration du cadastre
et de la topographie

Ministry of Finance - Land Registry and Topography Administration (ACT)

The Territorial Information Department, part of the Land Registry and Topography Administration, is responsible for providing the State, businesses, and citizens with reliable and up-to-date geographic data. These data form an essential foundation for planning, mobility, and territorial management. They include, in particular, the provision of points of interest on platforms such as Geoportal and the national mobility application.

To ensure the quality and relevance of this information, the Department works closely with the Observatoire national des PME, which regularly provides updates on retail businesses in Luxembourg. These data are integrated into official databases and made available to public and private stakeholders, thereby contributing to improved accessibility and coherent territorial development.

More information: **www.act.gouvernement.lu/**

uni.lu
UNIVERSITY OF LUXEMBOURG
Department of Geography
and Spatial Planning

University of Luxembourg - Department of Geography and Spatial Planning

The Department of Geography and Spatial Planning at the University of Luxembourg consists of an international and multilingual team of more than 50 researchers from different disciplines working together to examine spatial development processes at local, regional, and international levels. The interface between spatial research and more applied spatial-planning perspectives provides fertile ground for research activities and the resulting policy recommendations.

More information: **www.uni.lu**

03 | Why a Register?

The retail sector is currently undergoing a period of profound transformation: e-commerce, multichannel retail sales, and "retailtainment" are just a few of the terms that illustrate this "retail transformation." These constant changes in consumer behavior create new challenges for both retailers and our cities and municipalities.

To determine the necessary actions, it is first essential to understand the existing retail landscape and how it is evolving.

Such an approach requires reliable baseline data that provide insight into business structures and locations in Luxembourg. For a long time, this type of data was lacking in our country. At the local level as well, available data resources showed significant gaps.

The implementation of the Retail Register project helped fill these gaps in 2019. Combined with other external market data, the Register provides detailed and comprehensive information on the retail landscape, its structure, and its geographical distribution. Businesses from other sectors such as Horeca, crafts, and services are also recorded in the Register. This cross-sectoral approach makes it possible to better understand the economic development of entire regions and commercial centers.

To see which data is included in the Register, please refer to Chapter 5.1.

In the future, the regular updating and evaluation of data should make it possible to identify changes and trends in the supply infrastructure and to anticipate challenges in a timely manner. The objective is to establish a set of measures to stabilize and continuously develop commercial locations. The Register project lays the groundwork for future development-policy decisions at the local, regional, and national levels.

More information about the Retail Register service can be found in Chapter 09.

04 | Who is the Retail Report for?

The information presented in the Retail Report in the form of maps and statistics provides a starting point for objective discussion on issues relating to the future of national, urban, and commercial development, local retail, land use, and strategic site planning. Consequently, the report is intended for a broad audience of public and private stakeholders:

Ministries, chambers, and professional organizations

Through the Retail Report, ministries, chambers, and professional organizations have access to a national-level source of information on developments affecting the overall economy and sectoral trends. The various retail-related figures provide a foundation for informed discussion.

Professional organizations can draw on the information provided to derive new insights into developments affecting their sectors. These insights can serve as reference points for strategic decision-making.

Cities, municipalities, municipal associations, and tourism organizations

Cities and municipalities can use the Retail Report to stay informed about national development trends in the retail and food-service sectors. This enables them to analyze their own situation against national benchmarks.

Important note for all municipalities:

Since 2022, all municipalities in the country have had the opportunity to actively participate in the Retail Register project for a symbolic annual contribution of €1,500 (excluding VAT). They also gain access to their own raw data as well as various analytical tools. Interested municipalities can additionally benefit from the extensive advisory services and network of Luxembourg Confederation.

More information on access for municipalities can be found in Chapter 09.

Retailers, restaurateurs, and businesses

Private-sector stakeholders such as retailers, restaurateurs, and hoteliers can use the information in the Retail Report to support their thinking about new commercial locations.

Important note for all businesses:

Luxembourg companies can, just like municipalities, benefit from privileged access to certain information from the Retail Register. They can also use the "Localyze.lu" service free of charge, which includes an interactive map, external data, and a catalogue of customizable analyses designed to facilitate the evaluation of commercial sites.

More information on this topic can be found in Chapter 10.

Research institutions

Research institutions can build on the findings of the national retail report to support their research activities. The report provides an objective basis for discussion on interdisciplinary issues relating to the future of cities and regions. It aims to raise awareness of the challenges of the digital era and to foster a shared understanding of the need for open exchange and active cooperation.

Individuals

Anyone interested in economic development and the future of retail.

05 | **Explanations and remarks**

When reviewing the statistics, readers may naturally have many questions, for example, about the types of businesses included in the “food-related crafts” category, the difference between a “shopping center” and a “local supply center”, or what is meant by the inherently ambiguous concept of “sales areas.”

The very concept of “retail trade” can be interpreted broadly depending on the definition used. A broad interpretation would include not only the “traditional retail sectors” such as clothing, footwear, and food retail, but also, for example, bakeries and butcher shops. In other words, businesses that may also be classified under “food-related crafts.”

Statistics relating, for instance, to the number of retail businesses may therefore vary depending on the definition applied. This example illustrates the importance of clearly defining terms and establishing standards for developing these definitions.

This chapter therefore aims to explain all the concepts necessary for understanding the data and findings and summarizes them in a glossary (see Chapter 05.02).

05.01 | **Methodology and data**

This study on retail trade in Luxembourg is based on various data sources. The main database is the "**Cadastre de Commerce**", whose first nationwide data collection, conducted through on-site visits by a well-known retail research company, dates back to 2019. Since then, the Register data has been updated every six months. The most recent update took place between July and October 2025.

05.01.01 Which establishments are included in the Retail Register?

Contrary to what the name "Cadastre de Commerce" might suggest, it goes well beyond retail trade. For a long time, city center attracted visitors primarily through their function as places of supply. In the era of e-commerce with the convenience of home delivery, visitors are increasingly focused on needs other than strolling and shopping. If they are to remain attractive and vibrant in the future, city center must not simply serve as commercial locations but must become multifunctional experience spaces offering a diverse mix of retail, restaurants, and services. The guiding principles of urban development policies in many cities already incorporate this concept of multifunctionality.

To adequately reflect these developments, the Register adopts a multisectoral approach by including businesses from other sectors, such as food services and food-related crafts. Service providers and craft businesses have also been included for certain locations, as they can positively influence the vitality of commercial sites. Including complementary economic sectors makes it possible to present as complete a picture as possible of economic activity across the country's different commercial locations. As a result, the assessment of the attractiveness of city center and other commercial sites becomes more comprehensive.

Important note:

While data collection for retail trade (in the broad sense) and the Horeca sector was carried out across the entire territory of the Grand Duchy, this is not the case for service providers and craft businesses. Their survey was limited to what are known as "commercially significant locations," namely city centers, district and local centers, shopping centers, and local supply centers.

When reviewing the statistics presented in the Retail Report (see Chapter 6 and following), it is therefore important to distinguish between economic sectors for which data collection is intended to be exhaustive and those for which only partial data collection was carried out.

Below you will find an overview of the data-collection methodology:

What information is contained in the national Trade Register? And is it updated periodically?			
Economic sector	**Recorded nationwide**	**Only recorded in commercially significant areas**	**Sales area recorded (yes/no)*1**
Food Retail	×		Yes
Retail trade	×		Yes
Horeca	×		No
Craft sector (other)		×	No
Craft sector with connected retail		×	Yes
Services (other)		×	No
Services with connected retail	×		Yes

**1 Sales areas: including, in simplified terms, "all areas accessible to customers in which a sales transaction can be completed" (see Chapter 5.2 for more details).*

Not included in the Retail Register:

- Mobile vendors (sales carts, food trucks, etc.)
- Wholesale trade ("B2B")
- Trade in fuels and construction materials (without non-price-regulated products)
- Weekly markets
- Online-only businesses ("pure players") without a physical presence

05.01.02 Sectors of activity

Distribution of establishments by sector of activity:

Retail trade

All establishments (see the list of sectors in Chapter 05.01.03).

Food Retail

- Bakeries, pastry shops, chocolatiers
- Butcher shops

Horeca

- Hotels
- Restaurants
- Fast-food restaurants, snack bars
- Bistro, café, ice-cream makers
- Bar, pub, music club

Mixed uses and types of utilization.

In cases of mixed uses (e.g., retail trade and food service), the survey staff distinguish between primary use and secondary use based on visual assessment. In addition to the visual impression created by the shop's presentation, design, and advertising, an approximate calculation of the respective shares of sales areas may also lead to a corresponding categorization. The secondary use is therefore recorded in the comments column.

Services

- Service establishments

- Pharmacies
- Post offices
- Hair salons
- Photo studios
- Key cutting and locksmith services
- Beauty salons, massage centers, nail and foot care studios
- Gyms and fitness centers
- Etc.

- Service establishments without ancillary retail activity

- Real estate agencies
- Training centers
- Travel agencies
- Beauty salons, massage studios, gyms, manicure and pedicure services
- Studios, galleries
- Tourist offices
- Driving schools
- Libraries
- Recruitment agencies
- Tailor shops
- Dry cleaners
- Galleries
- Smartphone repair services

- Advertising agencies
- Yoga centers
- Dog grooming salons
- Funeral homes
- Etc.

Note : The above-mentioned establishments may also be classified as service establishments with ancillary retail activity if retail goods with price labels are sold there.

- Financial services

- Bank branches
- Insurance services
- Financial or investment advisory services
- Credit brokerage
- Tax advisory firms
- Financial accounting agencies
- Etc.

- Medical and social institutions

- Laboratories
- Medical centers
- Dentists
- Sports clubs
- Physiotherapy practices
- Social services
- Podiatry services
- Nursing services
- Trade unions
- Health insurance organizations
- Volunteer organizations
- Etc.

Crafts / Skilled trades

- Architectural firms
- Painting contractors
- Chimney construction companies
- Stonemasons
- Tiling companies
- Roofing contractors
- Construction companies
- Bicycle repair workshops
- Carpentry workshops
- Upholstery workshops
- Electricians
- Etc.

05.01.03 Overview of sectors

Below is an overview of the classification of sectors and their corresponding fields of activity:

Food-related crafts

- Bakery, pastry shop
- Butcher shop

Retail trade

- Automotive and motorcycle accessories
- Food retail
- Antiques, works of art
- Electrical appliances, consumer electronics, computers, photography
- DIY supplies, glassware, porcelain, ceramics, household goods
- Sports equipment, bicycles, hobbies
- Automobiles, motorcycles*
- Beverages
- Cut flowers

**This category was added later in 2024.*

- Games, toys
- Books, stationery, magazines, office supplies
- Garden equipment, pet supplies
- Furniture, home accessories
- Watches, jewelry
- Optics, hearing aids, sanitary goods
- Perfumes, cosmetics
- Para pharmaceutical products, drugstore goods
- Tobacco
- Home textiles
- Clothing, shoes, leather goods

Services (with ancillary retail activity)

- Services (with ancillary retail activity)
- Services (without ancillary retail activity)
- Financial services
- Medical and social institutions

Crafts / Skilled trades

- Crafts with ancillary retail activity
- Crafts without ancillary retail activity

Horeca

- Horeca
- Hotel
- Restaurant
- Fast food, snack bar
- Bistro, café, ice-cream shop
- Bar, pub, music club

05.02 | **Definitions**

To avoid any misinterpretation of the facts and figures presented in the Retail Report, and any incorrect conclusions by readers, the main concepts used are explained below:

- **Food Retail:** primarily refer to bakeries and pastry shops, confectioners, chocolatiers, butcher shops, and caterers.
- **Local supply center:** one or more large food retailers with complementary uses (services, retail, gastronomy) in the immediate surroundings. Unlike a shopping center, the sales areas of a local supply center is clearly focused on food products. To be classified as such, at least 5 POIs (see definitions p.10) are required, including a hypermarket or supermarket with a sales areas exceeding 800 m², and a total sales areas of at least 1,000 m². The Grand Duchy currently has 29 local supply centers (e.g., Cactus Bascharage, Aldi Capellen, Colruyt Weiswampach).
- **Retail Park:** a specific form of shopping center in which retail units are grouped around a shared parking area and the center is not managed internally (e.g., Retail Park Bettembourg, Retail Park Sandweiler).
- **Village center:** typically small local center with limited diversity of services, mainly focused on local supply. Classification requires either:
  - 0 POIs, including at least 5 establishments, or
  - 500 m² sales areas.
- **City center / district center:** urban areas with a relevant and diverse mix of businesses. Defined as areas with more than 50 POIs, including at least 10 establishments, or a total sales areas exceeding 2,000 m².
- **Retail trade (broad sense):** includes all retail businesses as well as food-related craft shops.
- **Retail trade:** businesses whose main value creation comes from selling goods to consumers (B2C). The premises must be accessible to customers and prices clearly displayed.
- **Multi-channel retail:** retailers selling goods through multiple distribution channels (online and offline).
- **Local supply center:** small food store with sales areas under 400 m², offering a limited range of local-supply products. This category also includes stores mainly selling beverages, confectionery, tobacco products, and newspapers (e.g., service-station shops).
- **Physical storefront:** stores selling products only in a physical location.
- **Service establishments with connected retail:** service-based businesses that also sell retail goods (e.g., a hair salon selling hair-care products).
- **Filiale:** a company with several spatially separate establishments operating under centralized policies (pricing, advertising, store design), centralized warehousing, procurement, accounting, and control.

- **Operational format:** grouping of retail manifestations that share one or more characteristics and are clearly distinguishable from other establishments.
- **Franchise:** a partnership-based distribution system allowing entrepreneurs to use an established business concept for a fee, including brand name, design, and business model.
- **Large-scale store:** any store with sales areas exceeding 10,000 m².
- **Hypermarket:** retail store with at least 5,000 m² of sales areas offering local-supply products and a full range of medium- and long-term goods (e.g., Auchan Kirchberg, Cactus Belle Étoile, E.Leclerc Bertrange).
- **Independent retailer:** a single outlet personally managed by its owner, without branches.
- **Commercial vacancy:** unused or unleased commercial buildings belonging to private or public owners. In the Register, the term refers exclusively to commercial premises that were previously used or could potentially be used for retail purposes. Vacant residential or other real estate is not included.
- **Specialty shop:** sector-specific retail business offering a wide range of products, advice, and services.
- **Specialty market:** large specialty store (sales areas over 400 m²) offering a broad assortment in a specific sector, mainly self-service, with advisory services (e.g., DIY stores, pet stores, electronics retailers).
- **Points of Interest (POI):** all objects recorded in the Register, including retail businesses, Horeca establishments, service companies, food-related crafts, and vacant premises.
- **Pop-up store:** temporary retail outlet operating in vacant retail premises.
- **Showroom:** exhibition space mainly used to present goods; sales occur only secondarily or not at all.
- **Sector of activity:** group of establishments or companies producing similar goods or providing similar services.
- **Commercially significant locations:** sites where retail activity already exists (e.g., city centers, district centers, shopping centers, local supply centers, retail parks).
- **Supermarket:** retail store with 400–5,000 m² of sales areas offering local-supply products complemented by medium- and long-term goods.
- **Hard-discount supermarket:** retail store typically under 1,000 m² (or larger in new constructions) offering a limited assortment focused on high-volume items in self-service, with regularly changing medium- and long-term goods (e.g., Aldi, Lidl).
- **Geographic Information System (GIS):** a system used to collect, store, process, analyze, visualize, and present geographically referenced information, enabling complex spatial issues to be clearly represented.

Sales areas

The definition of sales areas used in the Retail Report follows the gif (2012) guideline, ensuring international comparability between rental space and sales areas. According to this guideline, sales areas include, in simplified terms, "all areas accessible to customers in which a sales transaction can be completed."

This includes:

- Sales areas
- Exhibition and presentation areas
- Customer changing rooms
- Promotional and customer service areas
- Checkout and packaging areas
- Shop-window sales openings

Within sales areas only:

- Catering, play, and rest areas (e.g., in bookstores)
- Supermarket trolley stations
- Escalators

Outdoor areas used for sales on more than a temporary basis, such as:

- Sales stands
- Outdoor sales areas

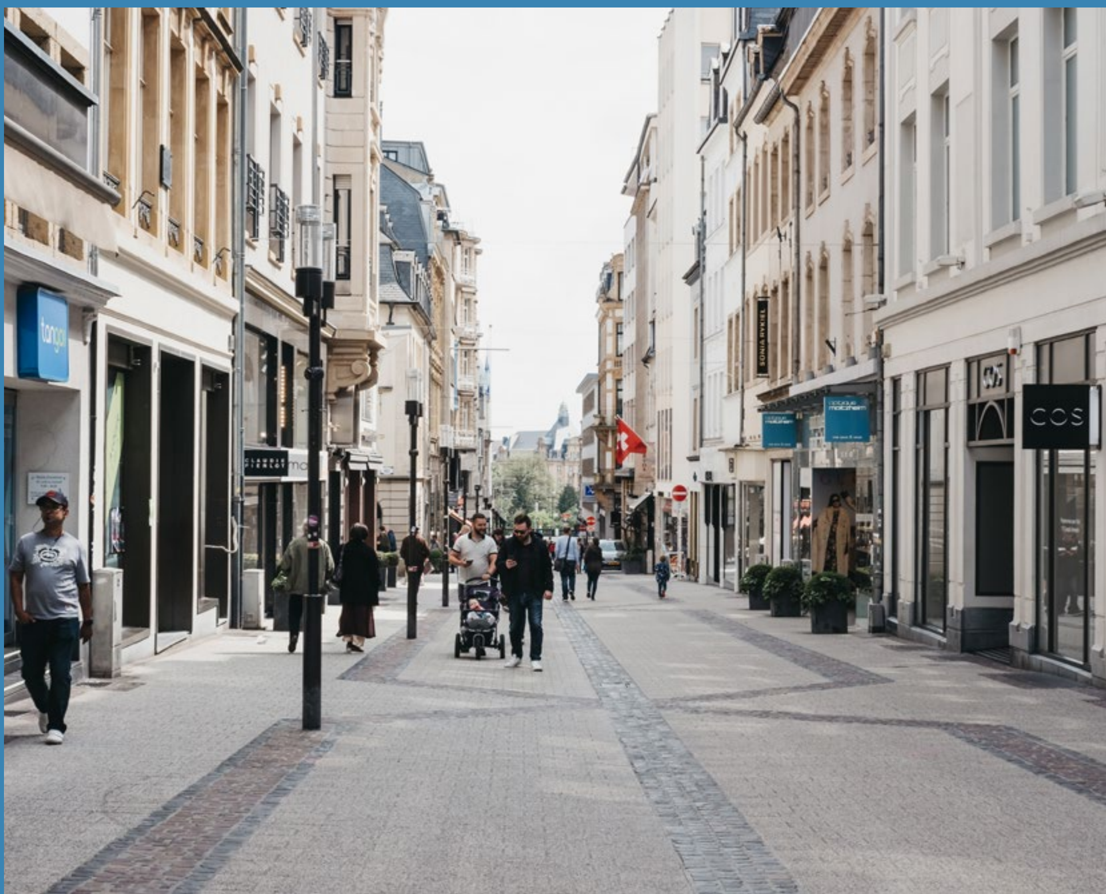
For practical reasons, sales areas have not yet been recorded for the Horeca sector, only establishment addresses and sector classification.

**gif : A network of stakeholders in the real estate sector aiming to establish standards that increase market transparency and promote professionalization in the sector.*

06 | Establishments and Sales Areas

This chapter provides an overview of the commercial landscape (retail trade and the Horeca sector), as well as its structural evolution since the first nationwide data collection in 2019.

The study focuses on the development of the number of establishments and sales areas, broken down by sectors and subsectors, as well as on other characteristics that provide a more detailed picture of the structural evolution of the commercial landscape.



	2025	2019	Évolution
Population of the GDL	688.460	626.110	+10,0%
Number of establishments	3.011	3.012*	-0,03%
Establishments per 1,000 inhabitants	4,37	4,81	-9,1%
Total sales areas (I) *by category*	**1.089.814 m²**	**1.056.799 m²**	**+3,1%**
Food Retail	349.505 m²	307.884 m²	+13,5%
Fashion & Beauty	226.675 m²	228.630 m²	- 0,9%
Home equipment	298.674 m²	319.990 m²	- 6,7%
Leisure & Culture	102.310 m²	98.380 m²	+4,0%
Other Retail	54.105 m²	55.100 m²	-1,8%
Sales area per capita *By Categories*	**1,58 m²**	**1,69 m²**	**-6,6%**
Food *(m² per capita)*	0,51 m²	0,49 m²	+4,49%
Fashion & Beauty *(m² per capita)*	0,33 m²	0,37 m²	-12,1%
Home equipment *(m² per capita)*	0,43 m²	0,51 m²	-15,6%
Leisure & Culture	0,15 m²	0,16 m²	-6,7%
Other Retail	0,08 m²	0,09 m²	-12,5%
Shopping malls	22	18	22,2%
Number of hypermarkets (II)	6	6	-
Number of supermarkets (III)	13	10	30,0%

i

Due to the retroactive reclassification of certain retail sectors, the total number of establishments has been adjusted compared with previous editions of the Retail Report. The data has been updated to reflect the new classification consistently.

Data relating to sales areas is always adjusted according to the vacancy rate. In other words, only floor space used by retail businesses and service establishments with ancillary retail activity has been considered.

(I) Total sales areas include, in addition to sales areas in the retail sector, the sales areas of service businesses with ancillary retail activity.

(II) A hypermarket is a business with sales areas exceeding 5,000 m², primarily focused on food retail.

(III) Large-scale stores are stores with sales areas exceeding 10,000 m²..

Sales areas per Capita

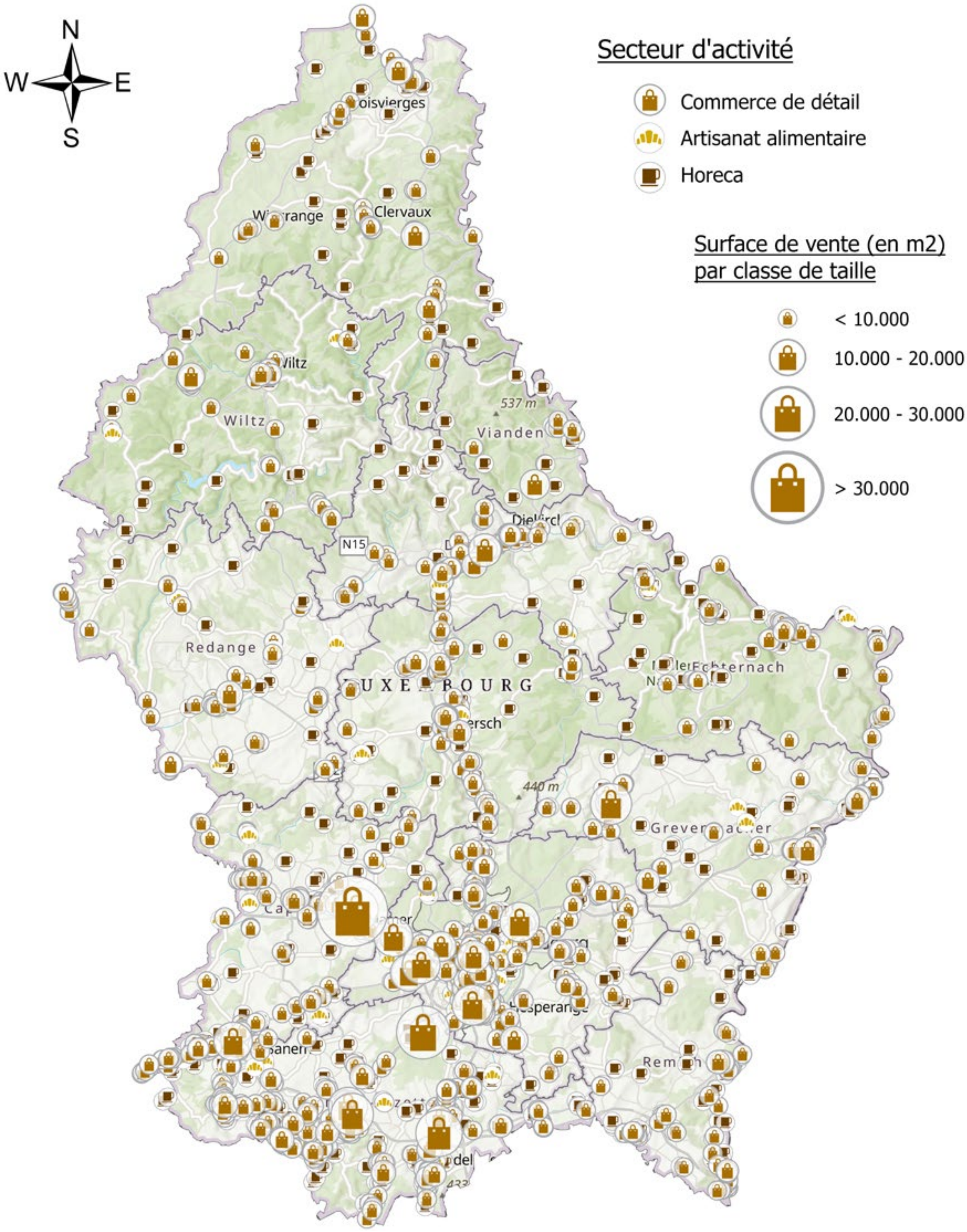
The **sales areas per capita** is an indicator of market saturation. If the value remains constant over a longer period, the market can be assumed to be saturated. If the value continues to increase, the market may be considered unsaturated, meaning that demand potential is not yet fully covered by the existing situation. A declining value tends to indicate an oversupply of sales areas, which have stabilized at the level of demand through natural market adjustment.

However, retail space per capita is not the only factor for drawing conclusions about the actual economic viability of retail businesses. In retail analysis, space productivity (turnover per square meter) is used as an economic benchmark. Since more than 231,000 employees are cross-border workers, the m^2-per-inhabitant indicator must be interpreted with caution.

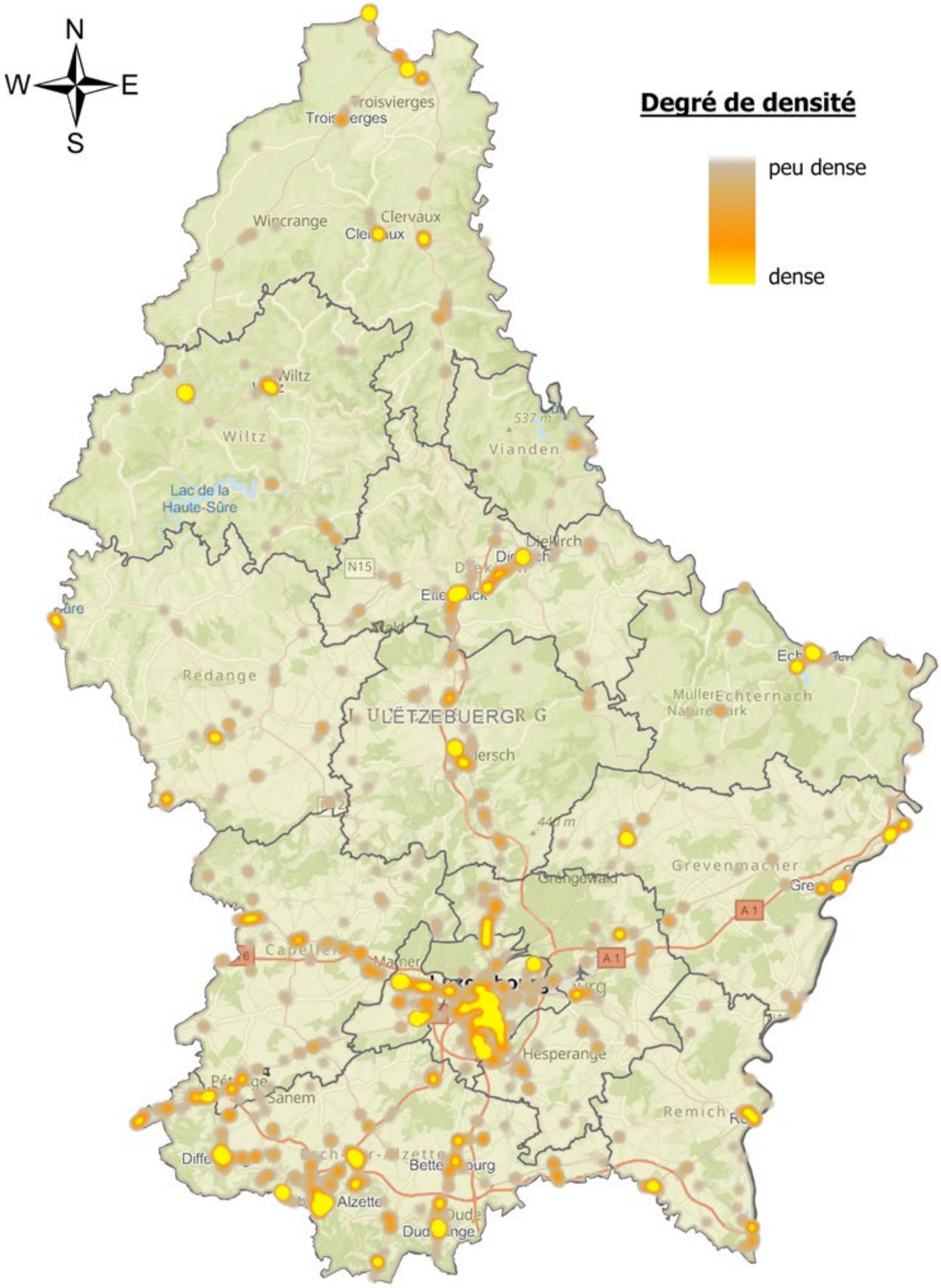
Discover the geographic distribution of establishments by sector of activity

Geographic distribution of establishments

by sector of activity



Sales areas density



06.01 | **Retail trade**

The results presented in this chapter are based on Retail Register data on retail trade, meaning all retail businesses and food-related craft businesses. In total, this represents 3,011 establishments with a total sales area of 1,031,269 m². The following statistical and cartographic analyses therefore refer to this dataset.

To improve clarity, retail trade has been divided into five main categories:

- **Food Retail**
- **Fashion & Beauty**
- **Home Equipment**
- **Leisure & Culture**
- **Other Retail**

These categories are composed of the various main sectors and subsectors as defined in the Retail Register. At the beginning of each subsection, you will find an overview of the sectors and subsectors examined in more detail.

Did you know...?

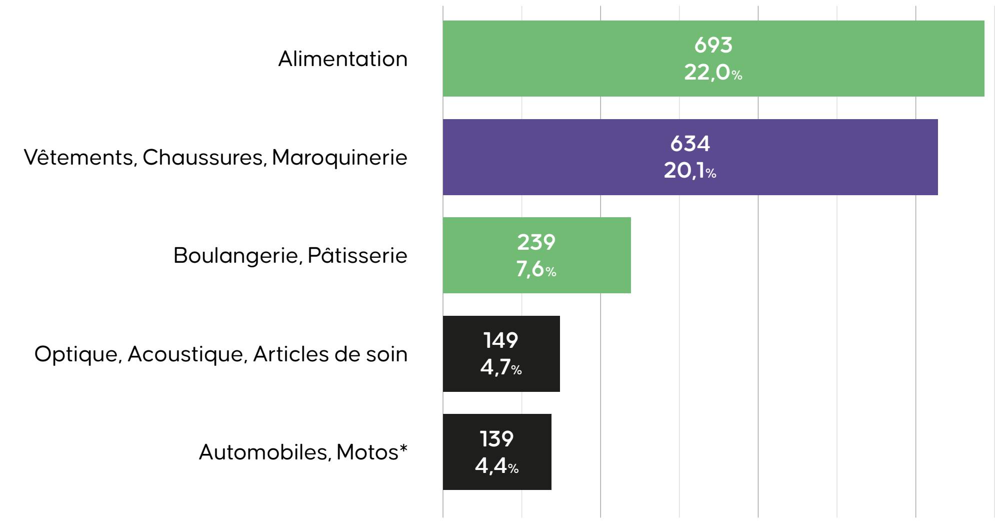
- There are nearly **100 grocery stores** specializing in international food products.
- There are almost **twice as many bars** in the canton of Esch-sur-Alzette (118) as in the canton of Luxembourg (66).
- Leisure & Culture **are gaining sales areas** despite a decline in the number of stores.
- **Fashion & Beauty are also the most digitalized sectors**, with nearly two out of three stores operating their own online shop.
- Food retail accounts for nearly **one-third of the retail sector's** total sales areas.

Below you will find an overview of the distribution of retail businesses by category:

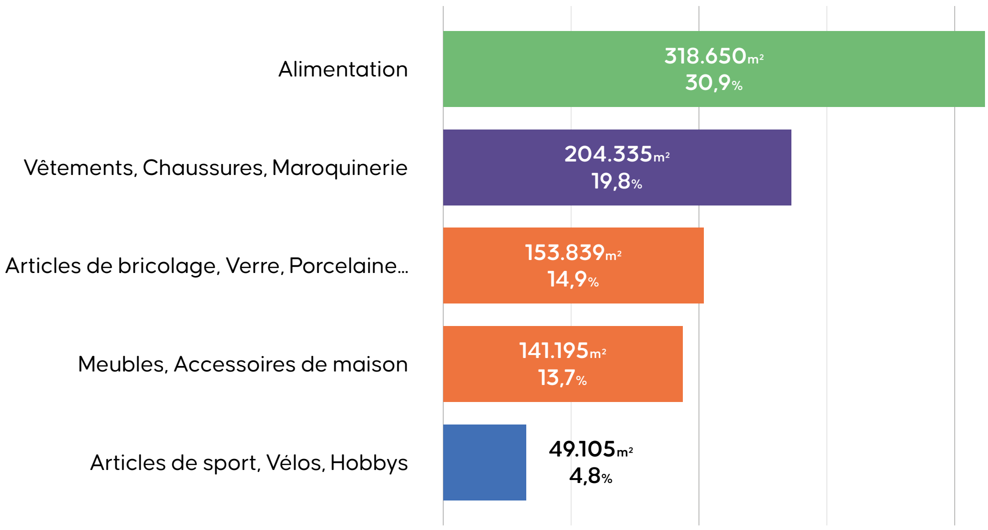
Overview of retail trade categories

Category	Food Retail	Fashion & Beauty	Home equipment	Leisure & Culture	Other Retail	Total
Number of POS	1.132	889	304	361	464	**3.150**
% of total	35,9%	28,2%	9,7%	11,5%	14,7%	**100%**
Sales area	349.505 m^2	226.675 m^2	298.674 m^2	102.310 m^2	54.105 m^2	**1.031.269 m^2**
% of total	33,9%	22,0%	29,0%	9,9%	5,2%	**100%**
Difference in sales area from 2019 to 2025	41.621 m^2	-1.955 m^2	-21.316 m^2	3.930 m^2	-995 m^2	**21.285 m^2**
Medium size	309 m^2	255 m^2	982 m^2	283 m^2	117 m^2	**327 m^2**

Sectors with the highest number of establishments

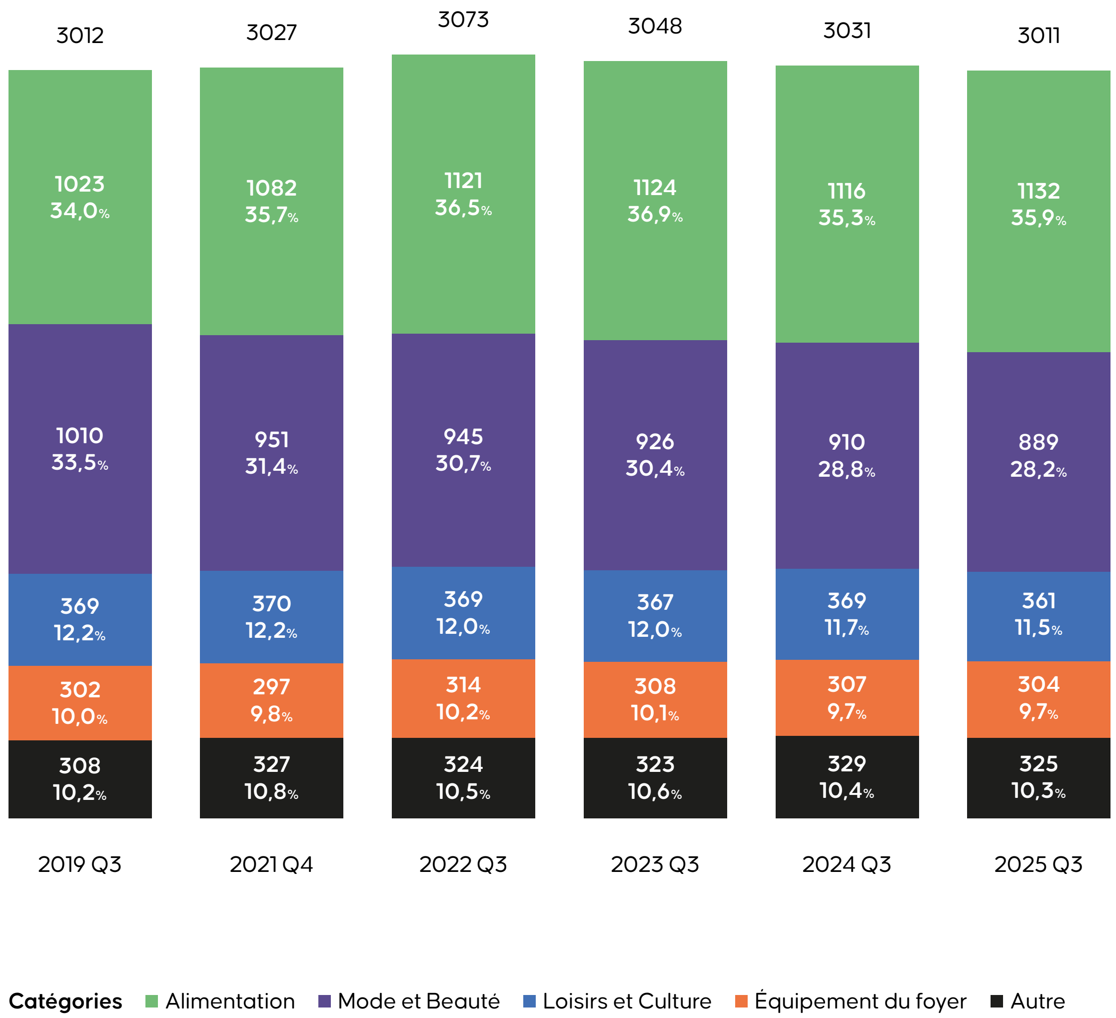


Sectors with the largest net sales areas



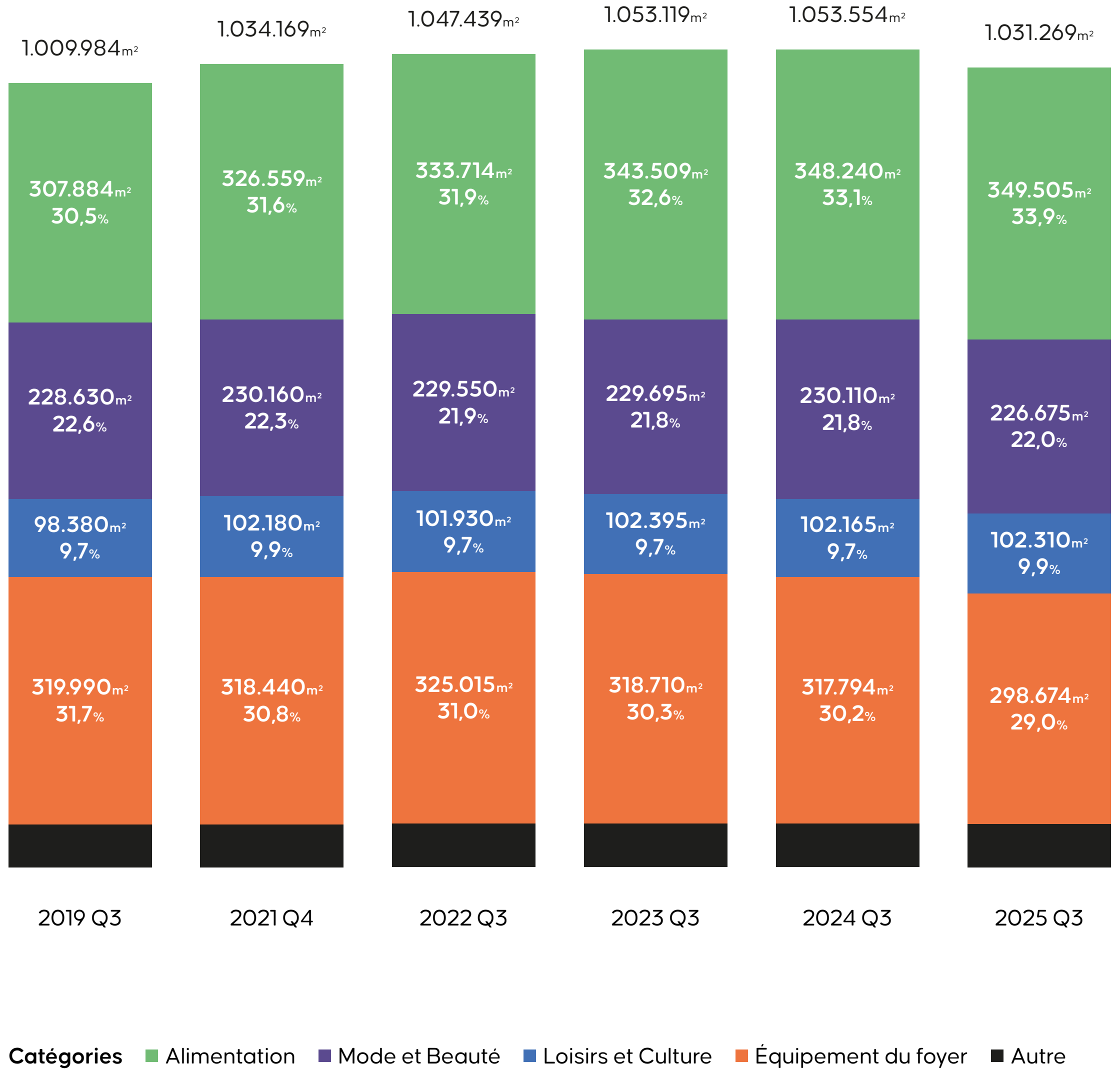
Catégories ■ Alimentation ■ Mode et Beauté ■ Loisirs et Culture ■ Équipement du foyer ■ Autre

Evolution of establishments
by category



Evolution of sales areas

by category



06.01.01 | **Food Retail**

	Main Sector	Sous-Branche
693 POI 318.650 m²	**Food**	• General food retail • International food stores • Specialty food stores • Organic stores, farm shops
113 POI 20.875 m²	**Beverages**	• Beverage retailers • Wine, spirits stores
87 POI 3.085 m²	**Butcher Shops**	-
239 POI 6.895 m²	**Bakery, Pastry Shop**	-

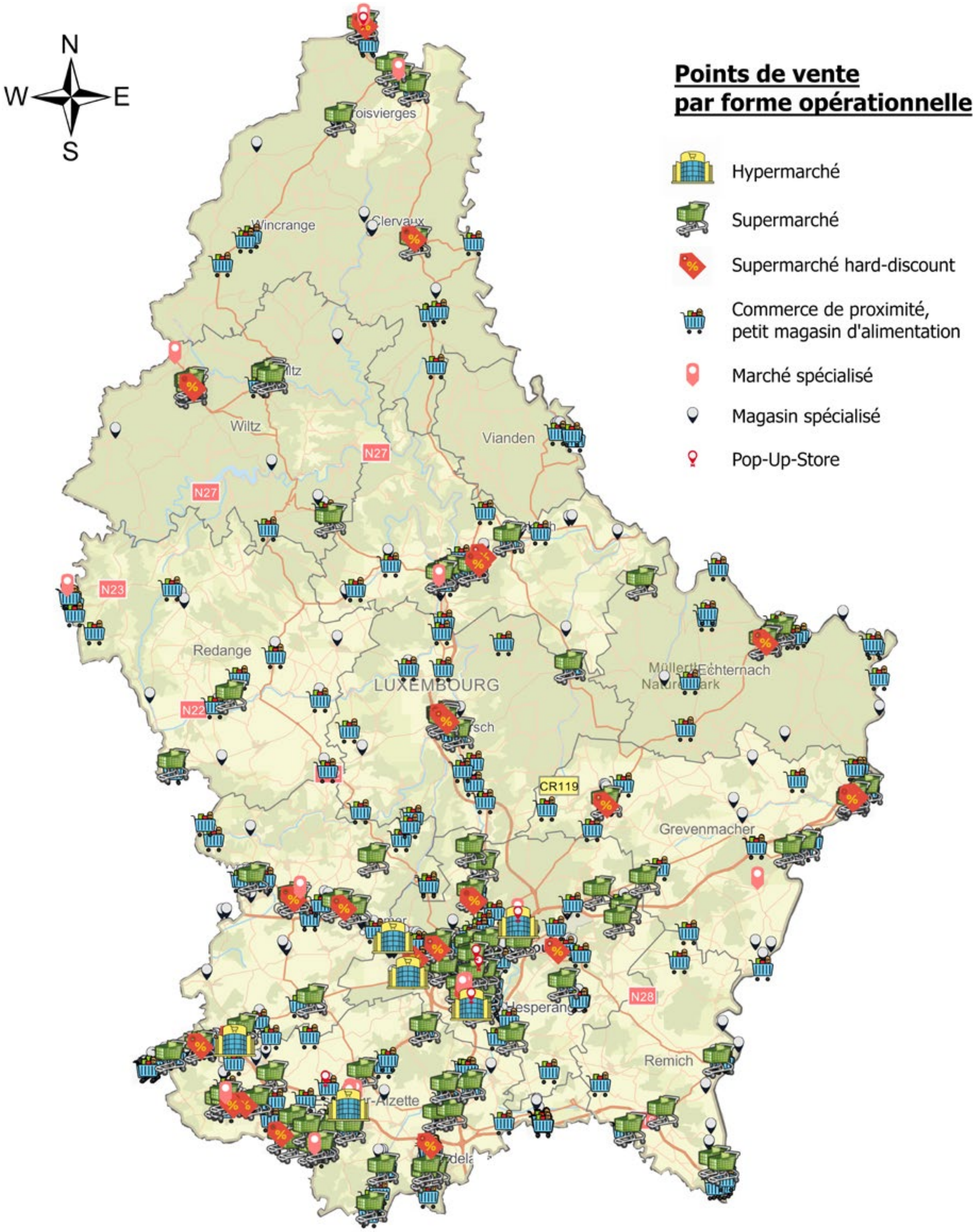
Quick overview of Food Retail

- Net turnover (2025): ≈ **€4,651 million** (own calculation; source: Statec)
- Number of establishments: **1,132 (+10.7% since 2019)**
- **28.5%** of all establishments in the retail sector
- Total sales areas: **349,505 m²** (+13.5% since 2019)
- **33.2%** of total sales areas in the retail sector
- Sales areas per inhabitant: **0.51 m²**
- Number of hypermarkets: **6**
- Number of supermarkets: **109**
- Number of hard-discount supermarkets: **31**
- Number of predominantly organic stores: **36**
- Chain-store share: **58.2% (base = 1,132 establishments)**
- Share of establishments with their own online shop: **15.9%**

Discover food retail by operational format

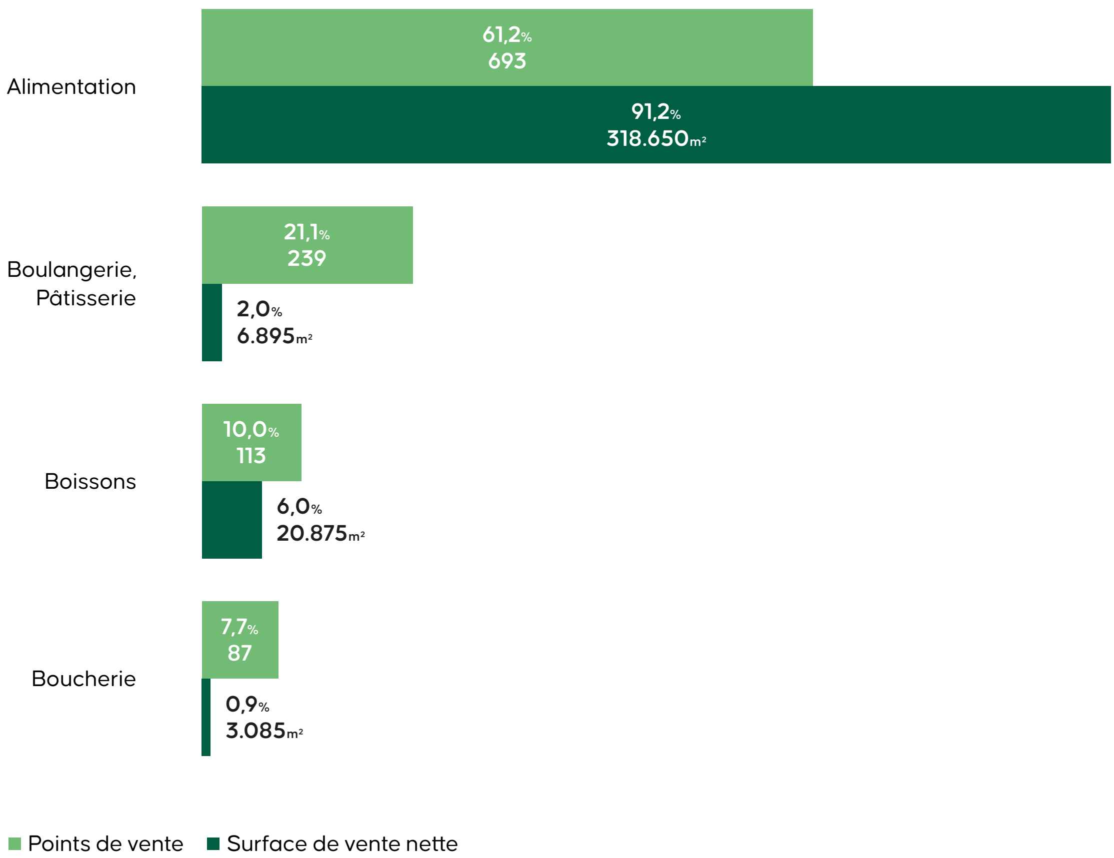
Overview of food retail

by operational format



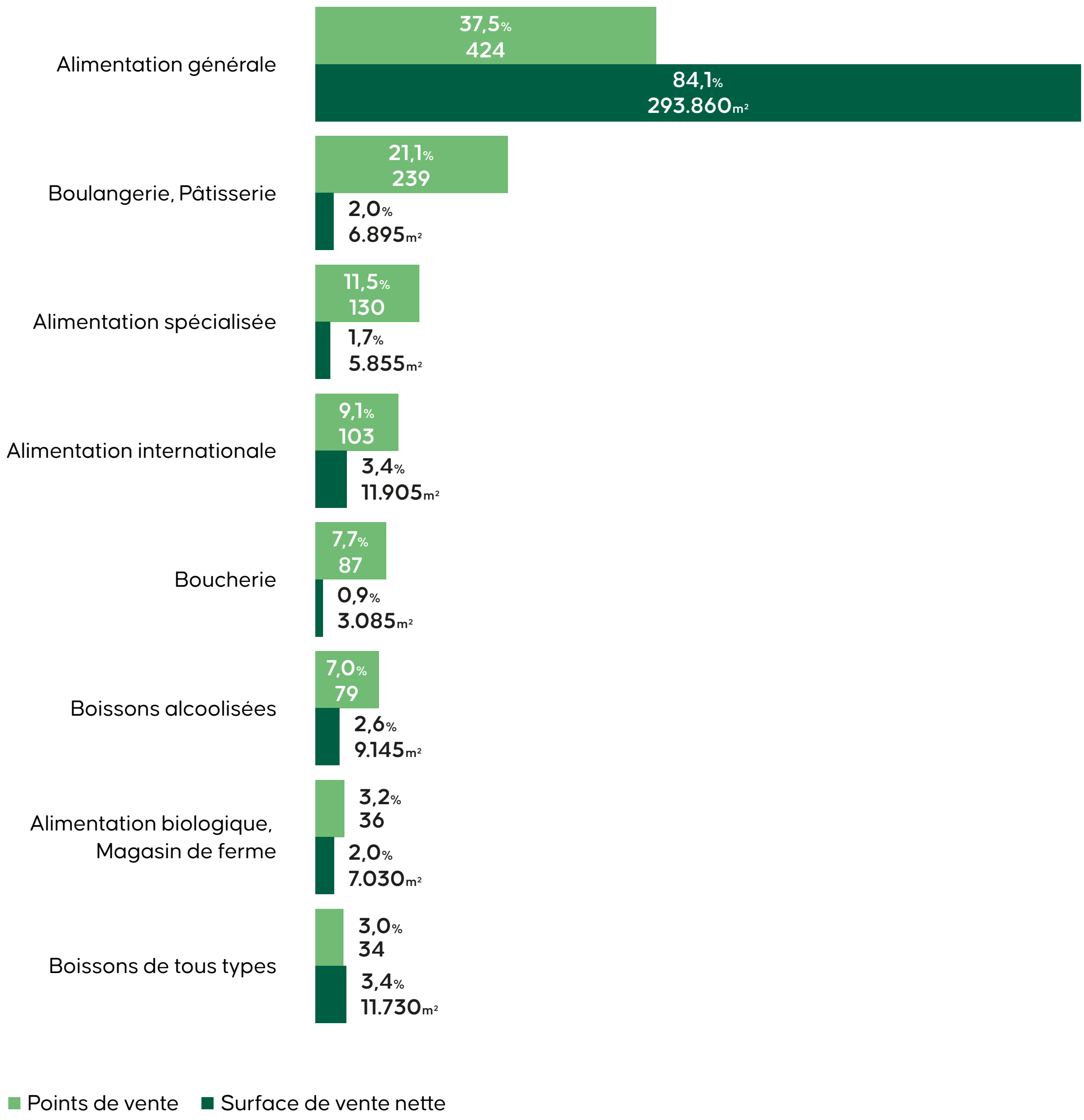
Distribution of establishments and net sales areas

by sector



Distribution of establishments and net sales areas

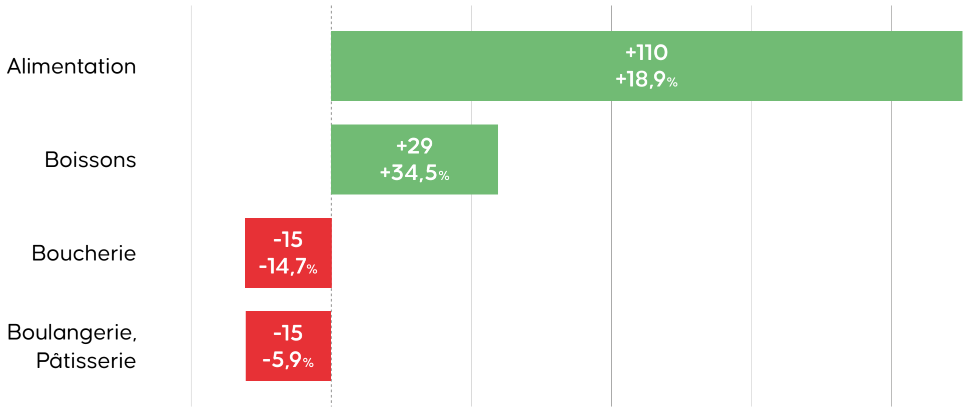
by subsector



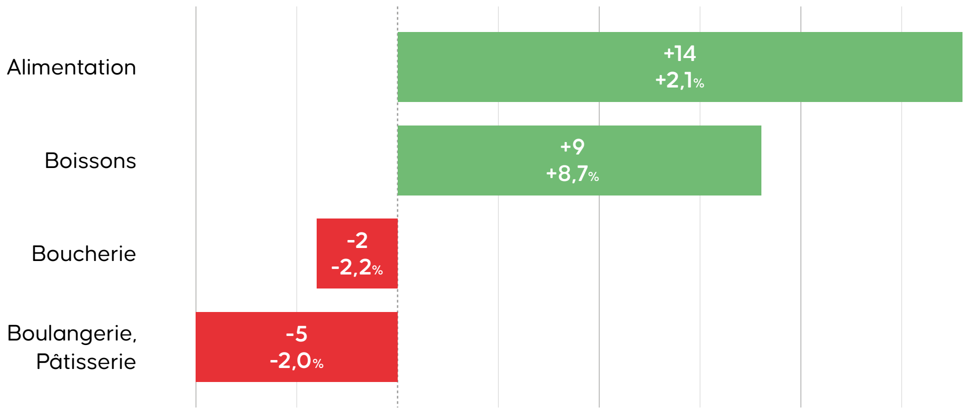
Evolution of establishments by sector

by sector

Evolution of establishments by sector, 2019 – 2025



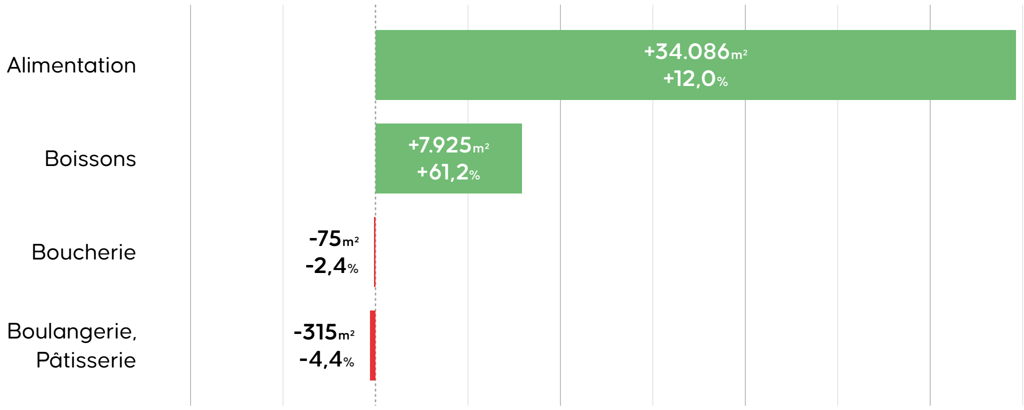
Evolution of establishments by sector, 2024 – 2025



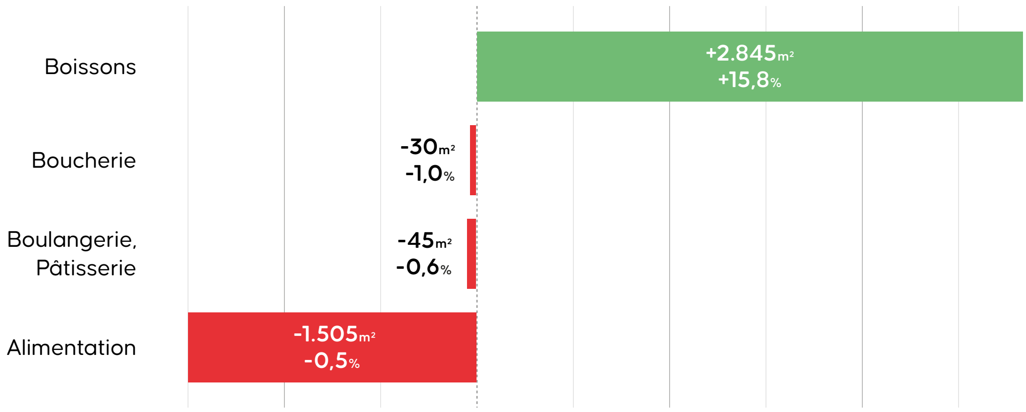
Evolution of net sales areas

by sector

Evolution of net sales areas by sector, 2019-2025



Evolution of net sales areas by sector, 2024-2025



Distribution of general food retail stores

by operational format

Hypermarkets:	Supermarkets:	Hard discount:	Small supermarkets:
6	109	31	313

Distribution of sales areas in general food retail

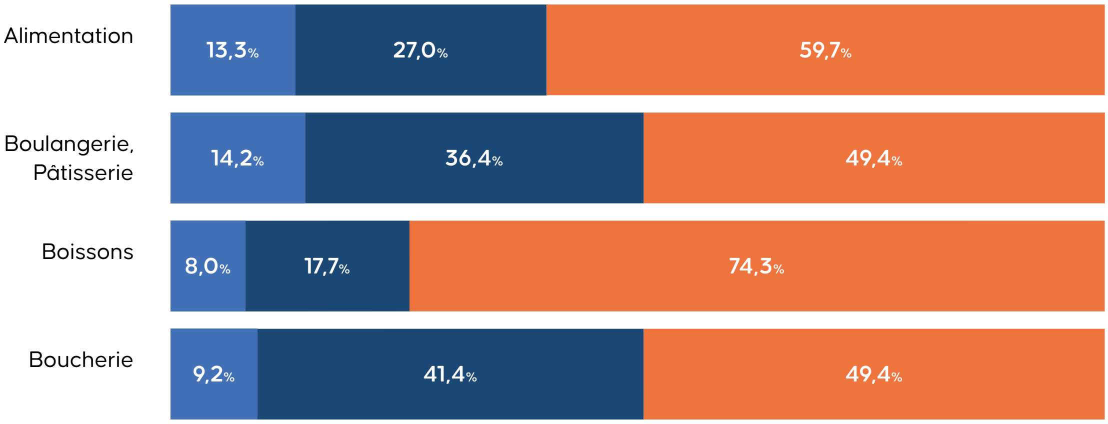
by operational format

Hypermarkets:	Supermarkets:	Hard discount:	Small supermarkets:
28.090 m²	116.526 m²	33.460 m²	38.339 m²

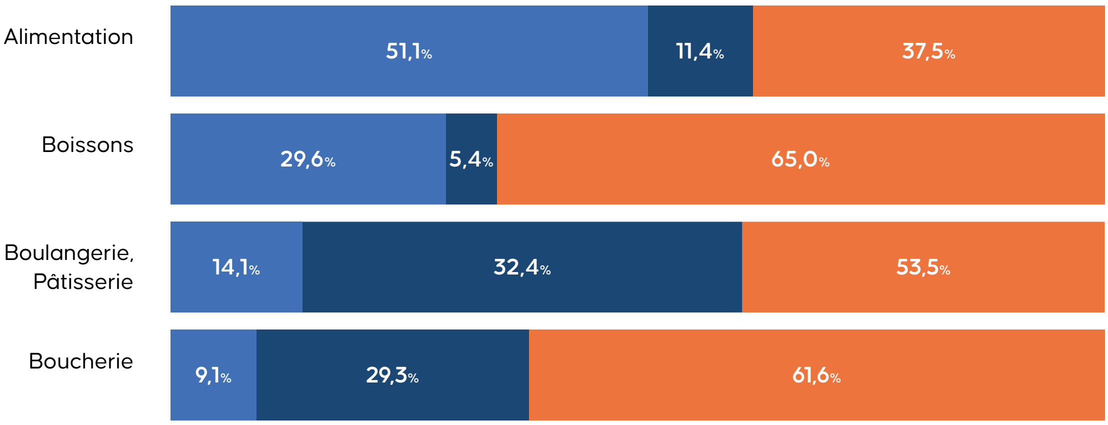
Discover the interactive map

Distribution of establishments
by location

Distribution of establishments by location



Distribution of net sales areas by location

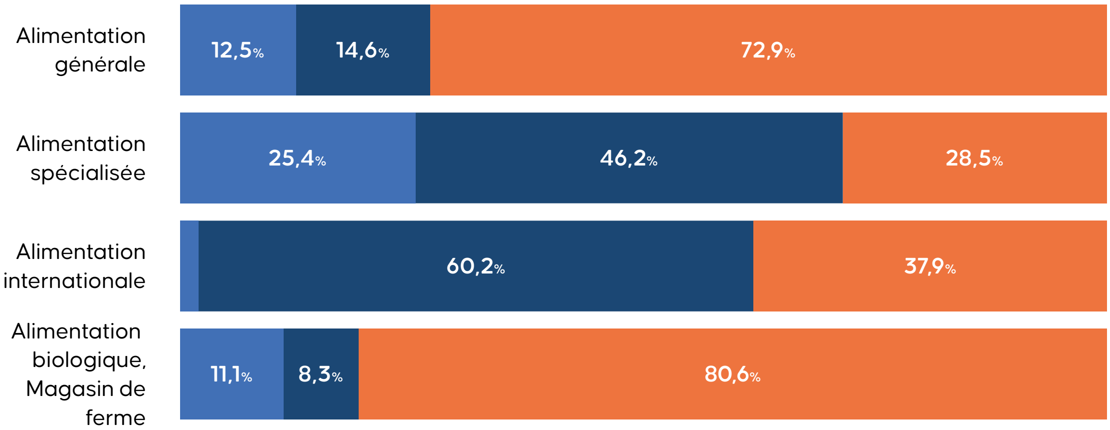


■ Centre commercial, d'approvisionnement, Retail Park
■ Centre de village & Centre-ville ■ Zone périphérique

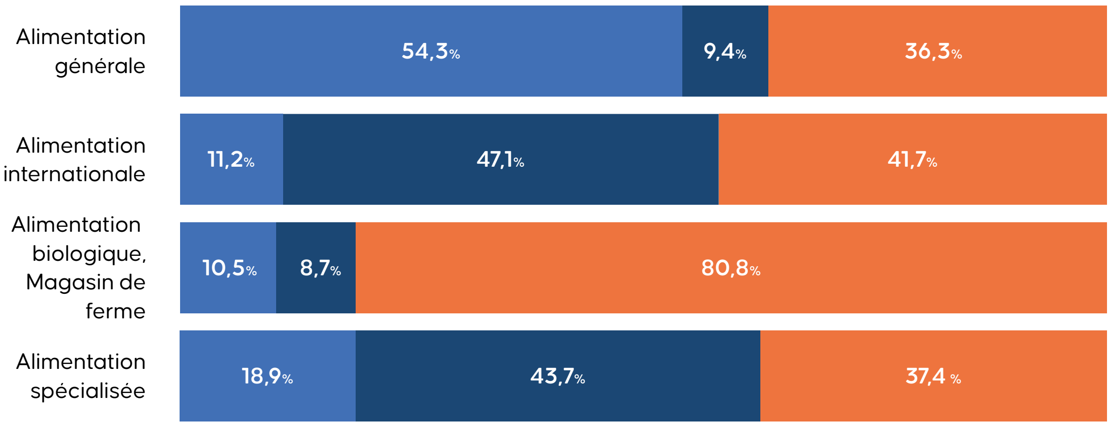
Distribution of establishments in the “Food Retail” sector

by location and subsector

Distribution of POIs by location and sub-sector



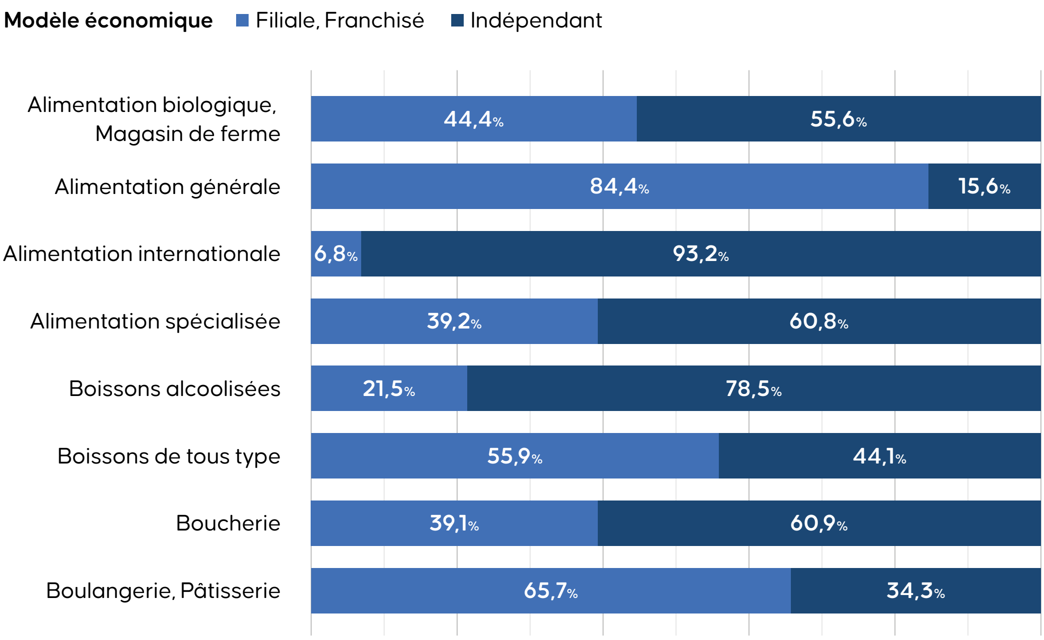
Distribution of net sales areas in the “Food Retail” sector by location and subsector



■ Centre commercial, d’approvisionnement, Retail Park
■ Centre de village & Centre-ville ■ Zone périphérique

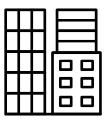
Distribution of establishments

by business model

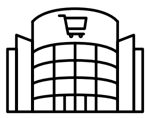


Distribution of establishments

by location category (base = 1,132 establishments)

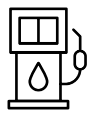


Village and city centers: 330 POI



Shopping centers: 76 POI

Periphery: 58 POI



Service stations: 224 POI

Distribution of sales areas

Distribution of sales areas by location category (base = 348,750 m²)

Village and city centers: 40,620 m²	Shopping centers: 78,775 m²	Periphery: 86,461 m²	Service stations: 33,544 m²

06.01.02 | **Fashion & Beauty**

	Main Sector	Sub-Sector
108 POI 5.855 m²	**Watches, Jewelry**	-
89 POI 10.055 m²	**Perfumes, Cosmetics**	-
58 POI 6.430 m²	**Para pharmaceuticals, Drugstores**	• Para pharmaceutical products • Drugstores
634 POI 204.335 m²	**Clothing, Footwear, Leather Goods**	• Shoes • Lingerie • Leather goods • Specialty fashion • Clothing

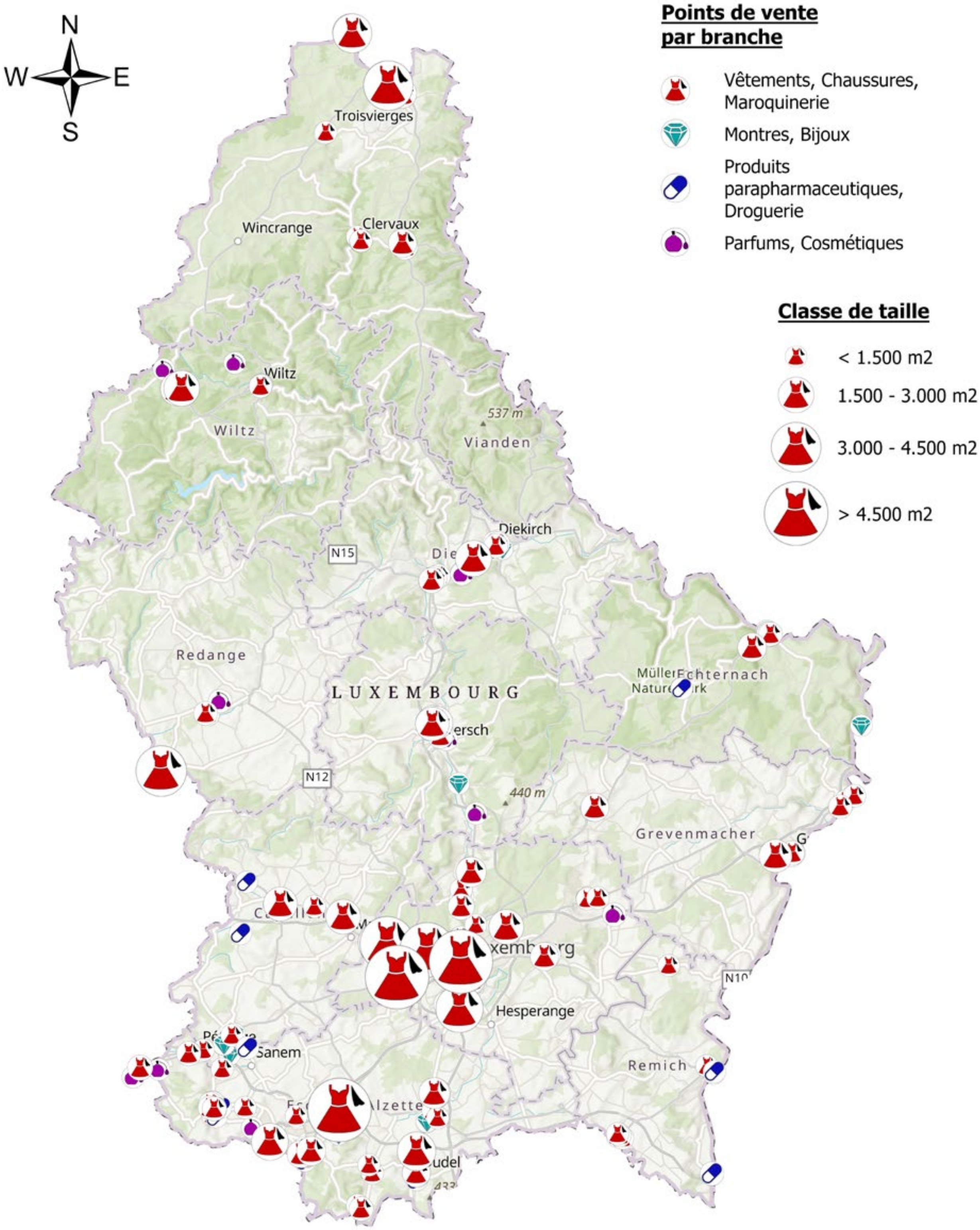
Quick overview of the "Fashion & Beauty" category

- Net turnover (2025): **≈ €1,531 million** (own calculation; source: Statec)
- Number of establishments: **889 (−12.0% since 2019)**
- **31.5% of all establishments** in the retail sector
- Total sales areas: **226,675 m² (−0.9% since 2019)**
- **22.2% of total sales** areas in the retail sector
- Sales areas per inhabitant: **0.33 m²**
- Number of specialty stores: **765**
- Chain-store share: **61.3% (base = 889 establishments)**
- Share of establishments with their own online shop: **65.5% (base = 889 establishments)**

Discover the "Fashion & Beauty" category by sector and size class

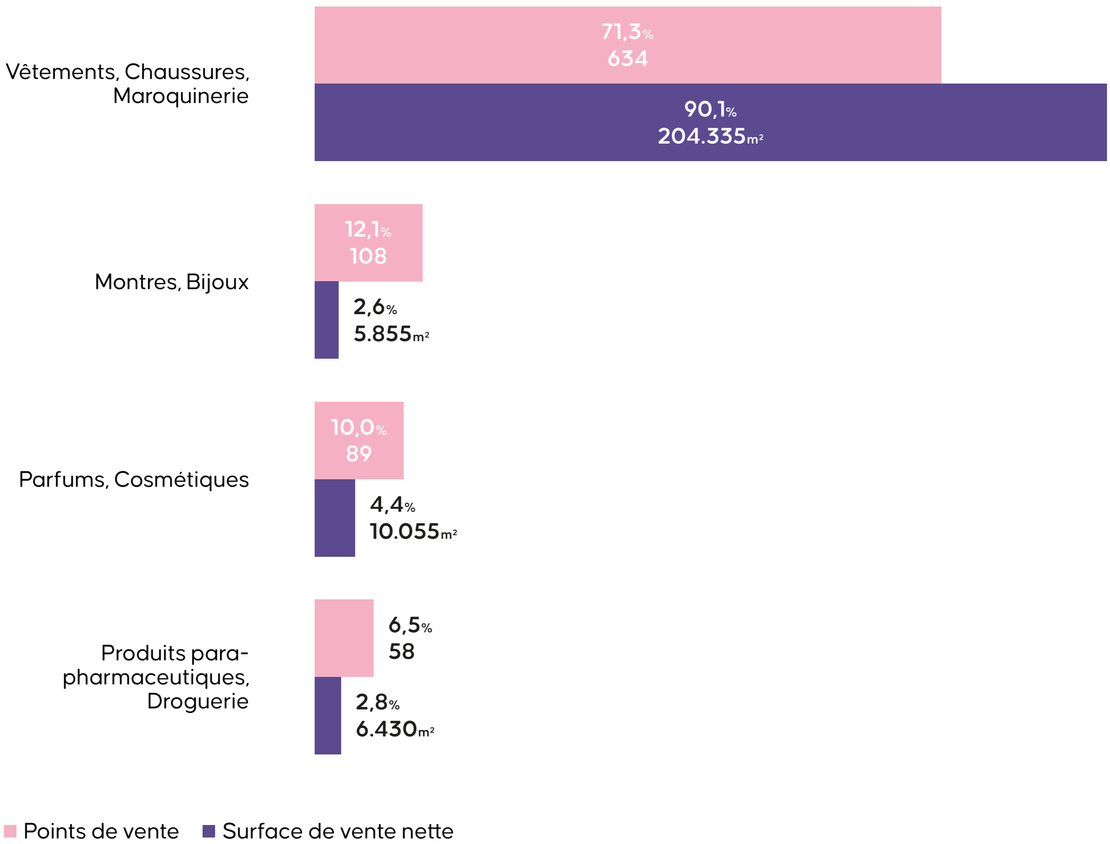
Overview of the "Fashion & Beauty" category

by branch and size class



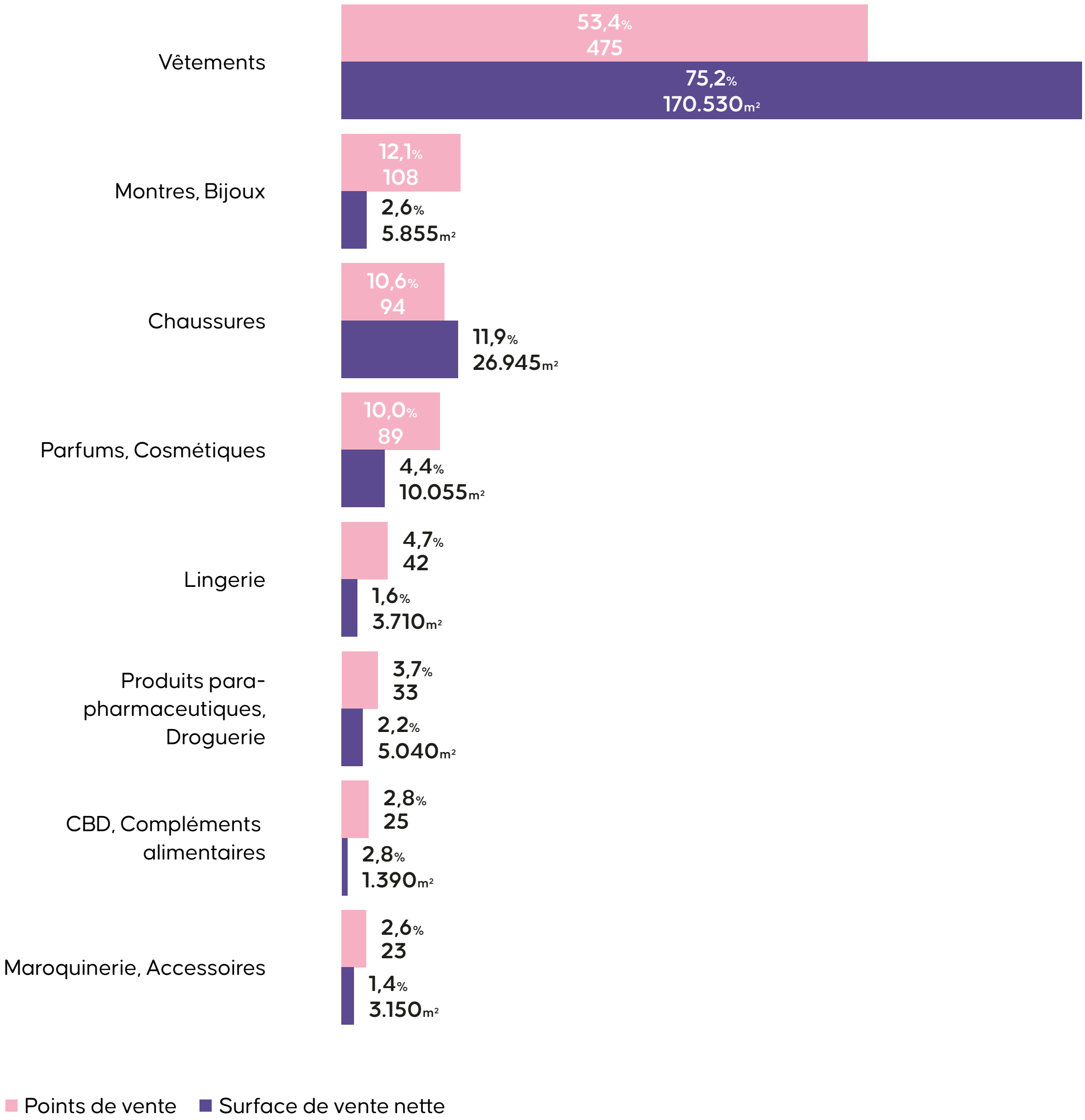
Distribution of establishments and net sales areas

by sector



Distribution of establishments and net sales areas

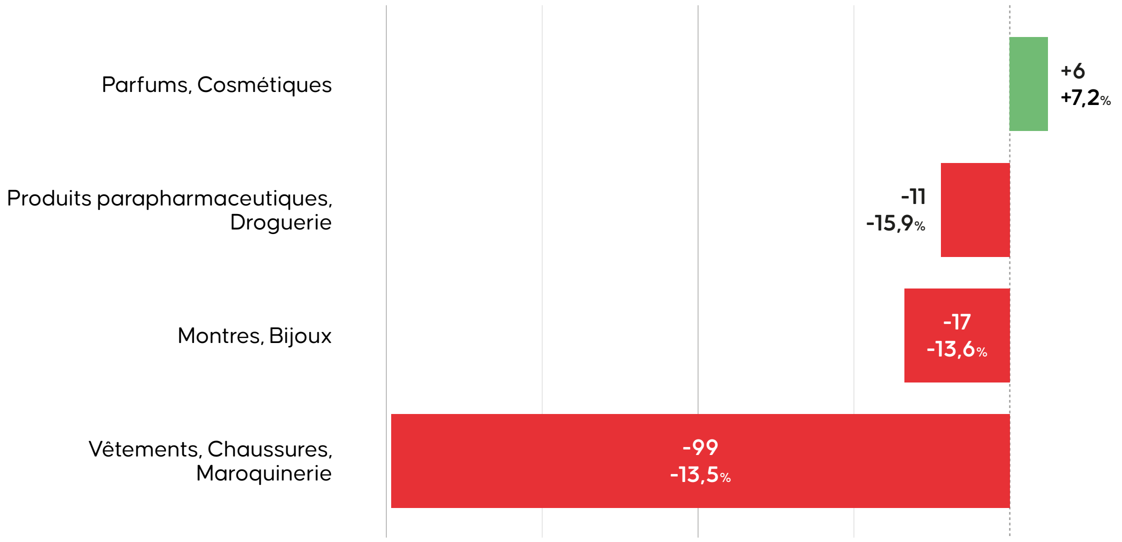
by subsector



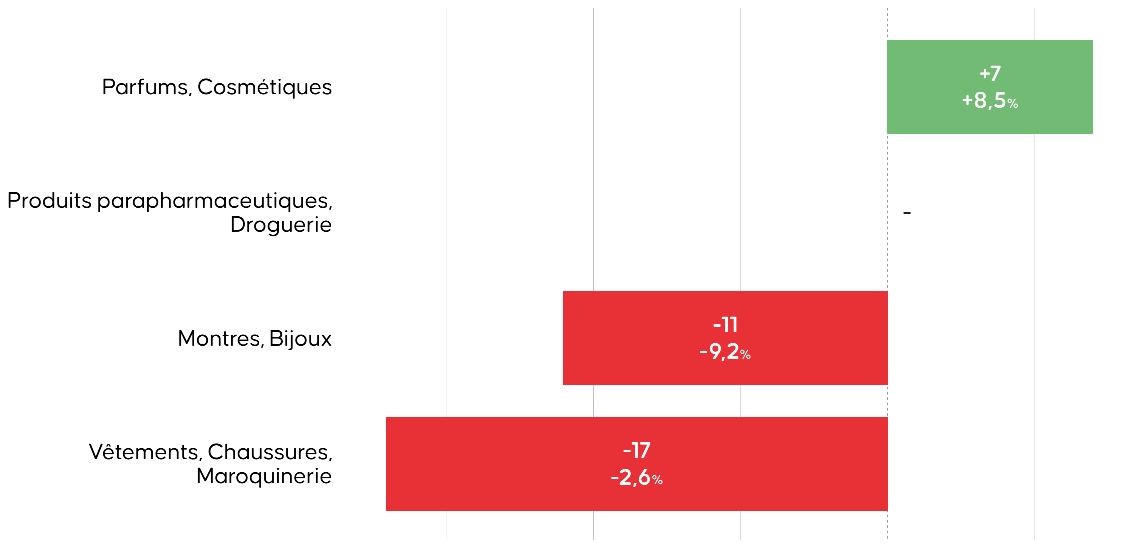
Evolution of establishments

by sector

Evolution of establishments by sector, 2019-2025

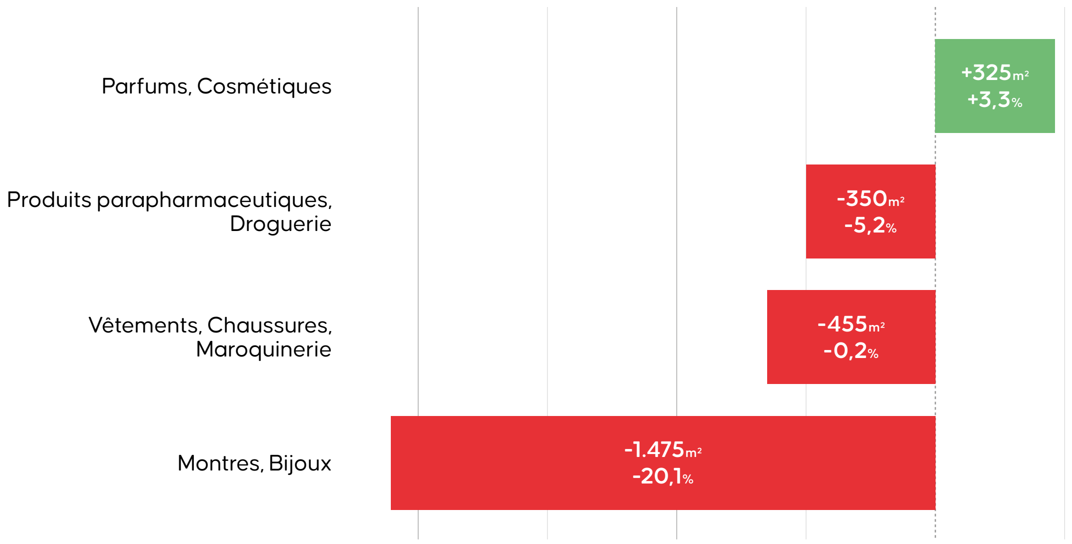


Evolution of establishments by sector, 2024-2025

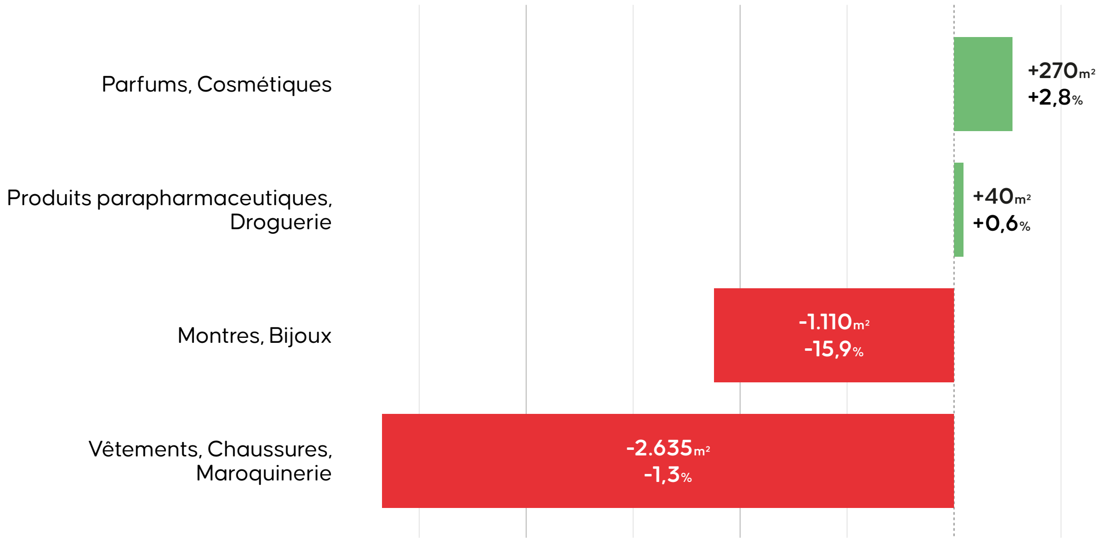


Evolution of net sales areas
by sector

Evolution of net sales areas by sector, 2019-2025



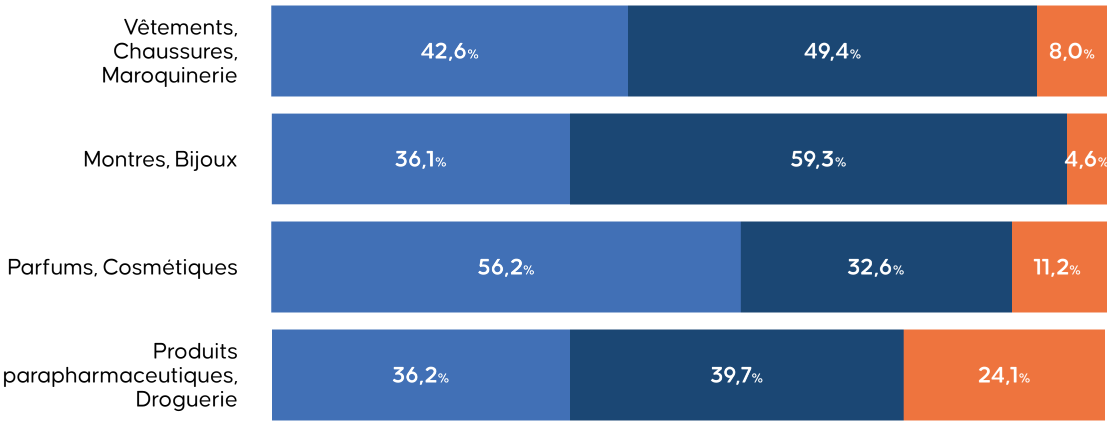
Evolution of net sales areas by sector, 2024 - 2025



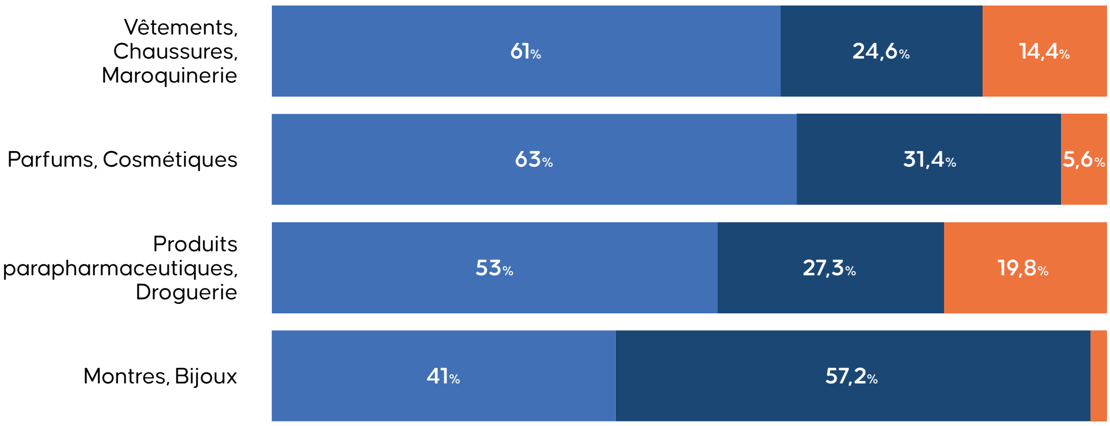
Distribution of establishments

par localisation

Distribution of establishments by location



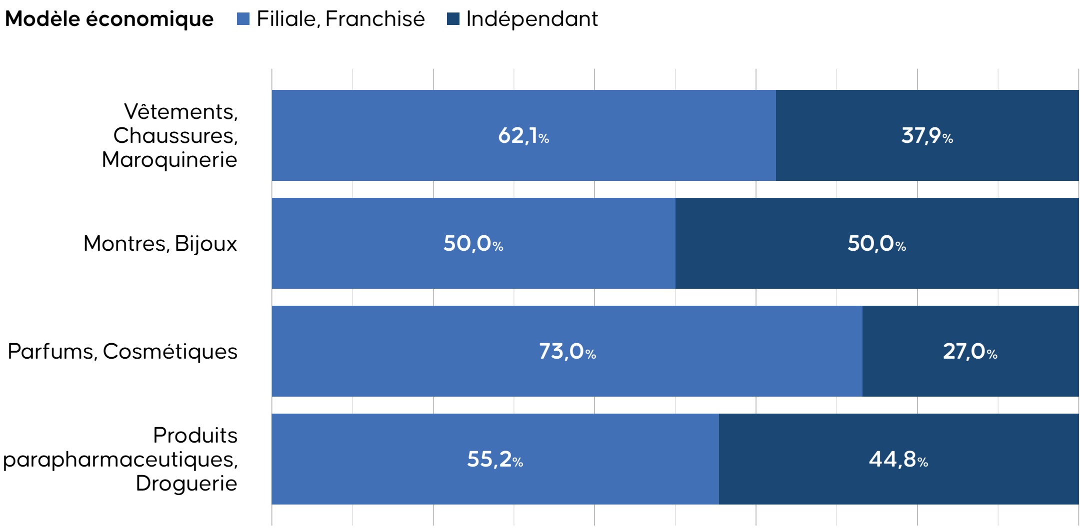
Distribution of net sales areas by location



■ Centre commercial, d'approvisionnement, Retail Park
■ Centre de village & Centre-ville ■ Zone périphérique

Breakdown of points of sale

by business model



06.01.03 | **Home Equipment**

	Main Sector	Sub-Sector
11 POI 550 m^2	**Antiques, Art**	-
132 POI 153.839 m^2	**DIY, Glass, Porcelain, Ceramics, Household Goods**	• DIY, Glass, Porcelain, Ceramics, Household Goods
130 POI 1141.195 m^2	**Furniture, Home Accessories**	• Home Accessories • Kitchens, Bathrooms • Mattresses, Bedding • Furniture
31 POI 3.090 m^2	**Household textiles**	-

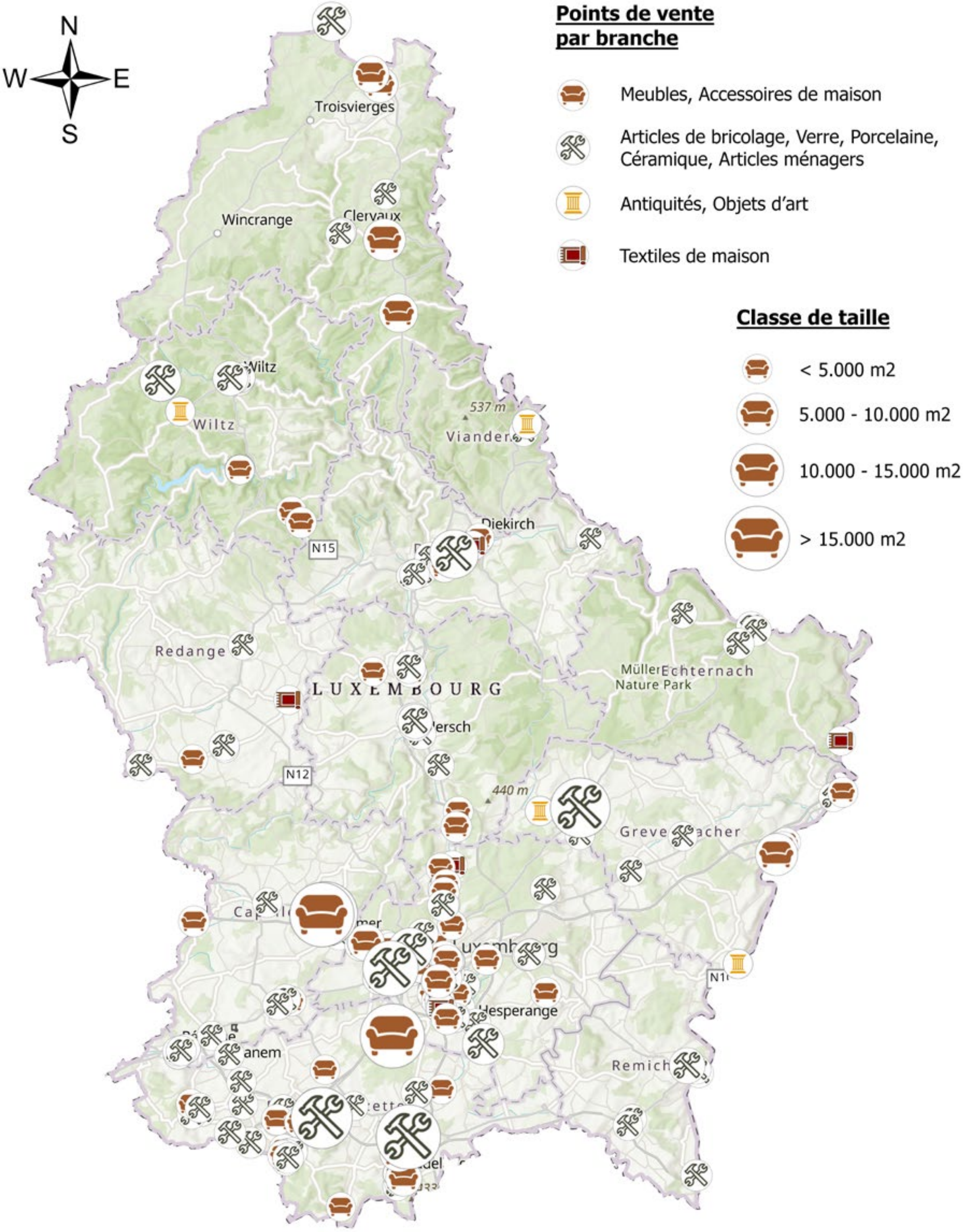
Quick overview of the “Home equipment” category

- Net turnover (2025): **≈ €1,230 million**
  (own calculation; source: Statec)
- Number of establishments: **304 (+0.7% since 2019)**
- **10.8% of all establishments** in the retail sector
- Total sales areas: **298,674 m² (–6.7% since 2019)**
- **29.2% of total sales areas** in the retail sector
- Sales areas per inhabitant: **0.43 m²**
- Number of large-scale stores (>10,000 m²): **7**
- Chain-store share: **33.9% (base = 304 establishments)**
- Share of establishments with their own online shop: **50.3%**
  (base = 304 establishments)

Discover the “Home equipment” category by sector and size class

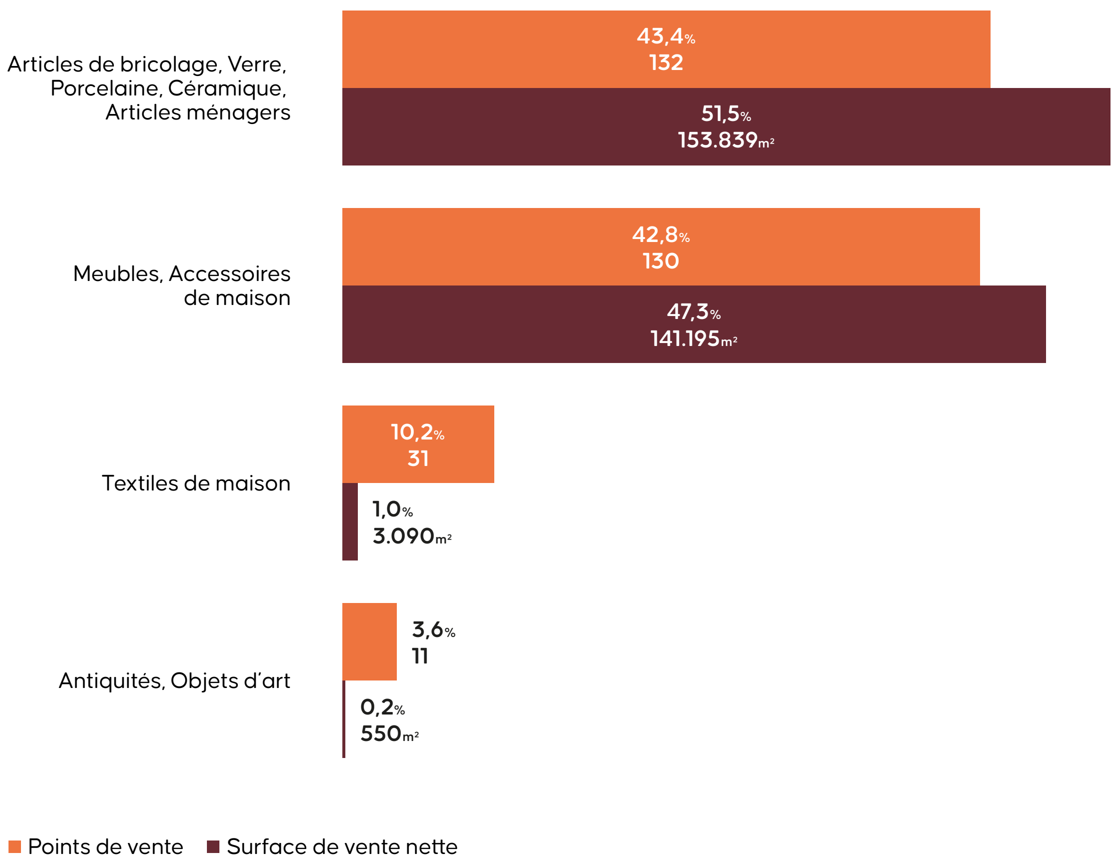
Overview of the "Home Equipment" category

by branch and size class



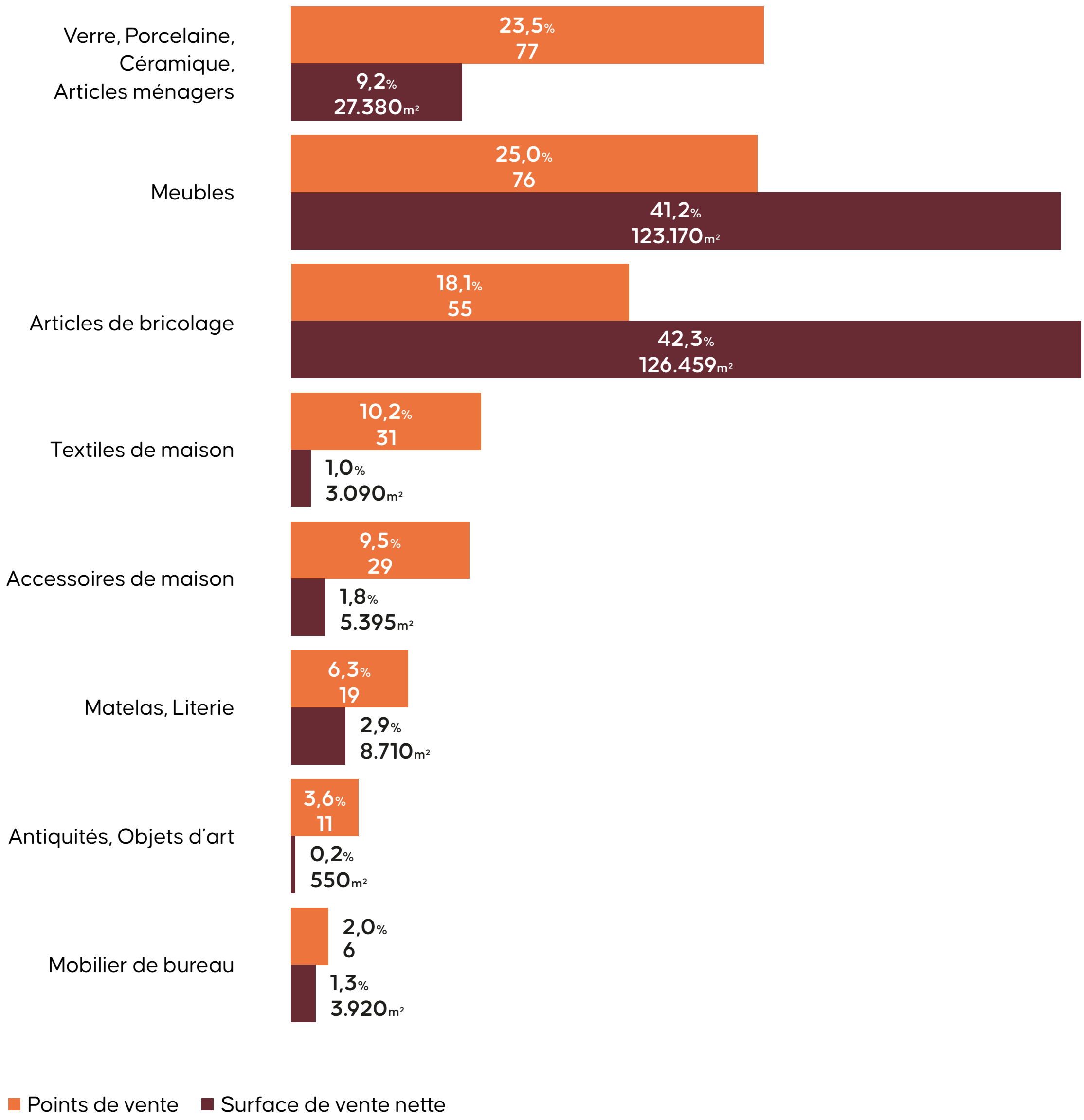
Distribution of establishments and net sales areas

by sector



Distribution of establishments and net sales areas

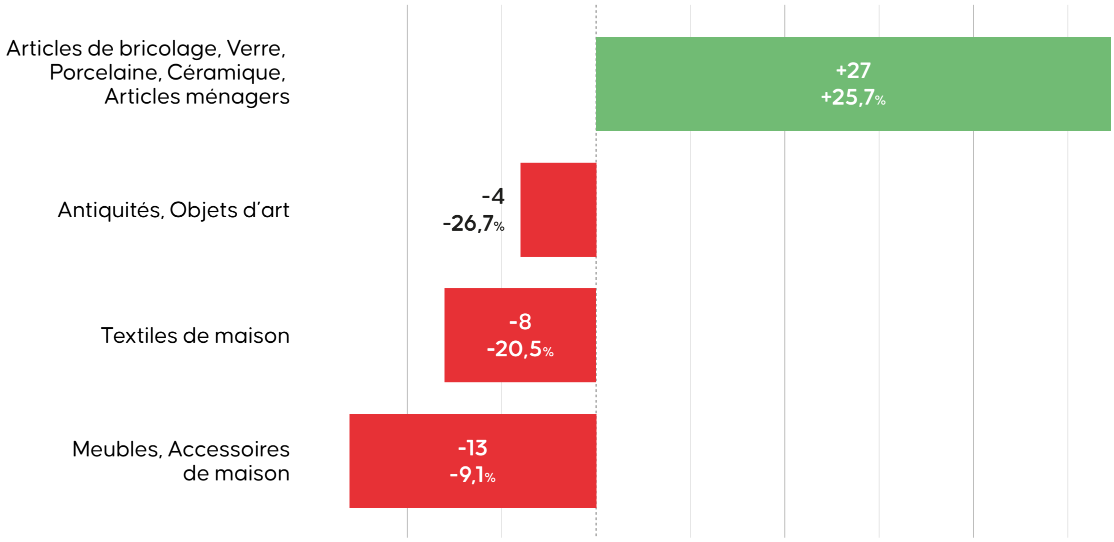
by subsector



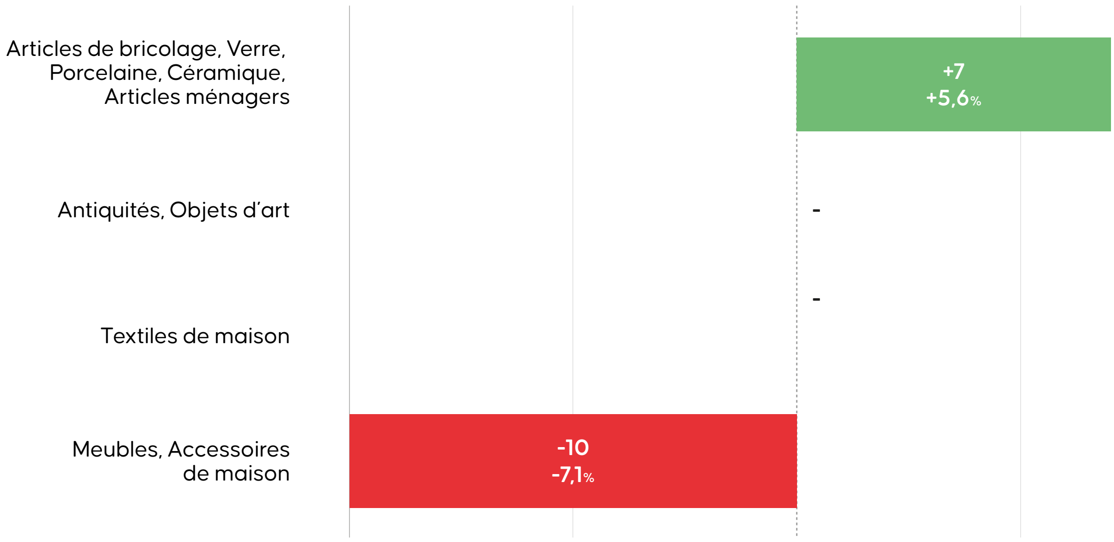
Evolution of establishments

by sector

Evolution of establishments by sector, 2019-2025



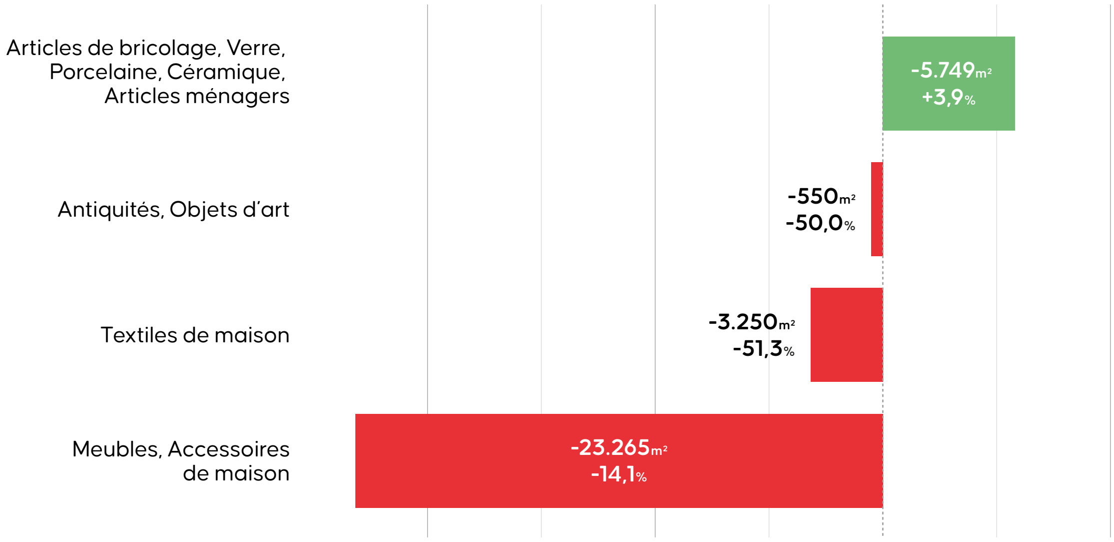
Evolution of establishments by sector, 2024-2025



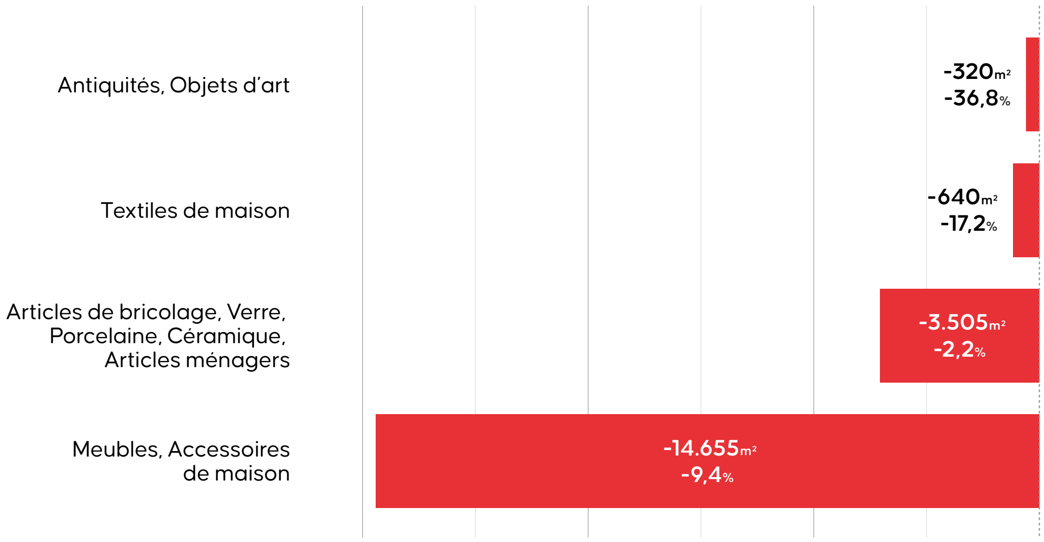
Evolution of net sales areas

by sector

Evolution of net sales areas by sector, 2019–2025



Evolution of net sales areas by sector, 2024 – 2025



06.01.04 | **Leisure & Culture**

	Main Sector	Sub-Sector
92 POI 29.475 m²	**Electrical appliances, Consumer Electronics, Computers, Photography**	-
111 POI 49.105 m²	**Sporting goods, Bicycles, Hobby supplies**	• Sporting goods, Bicycles Instruments, Hobby supplies
40 POI 9.790 m²	**Games & Toys**	-
118 POI 13.940 m²	**Books, Stationery, Magazines, Office supplies**	• Books • Magazines, Stationery, Office equipment • Office furniture

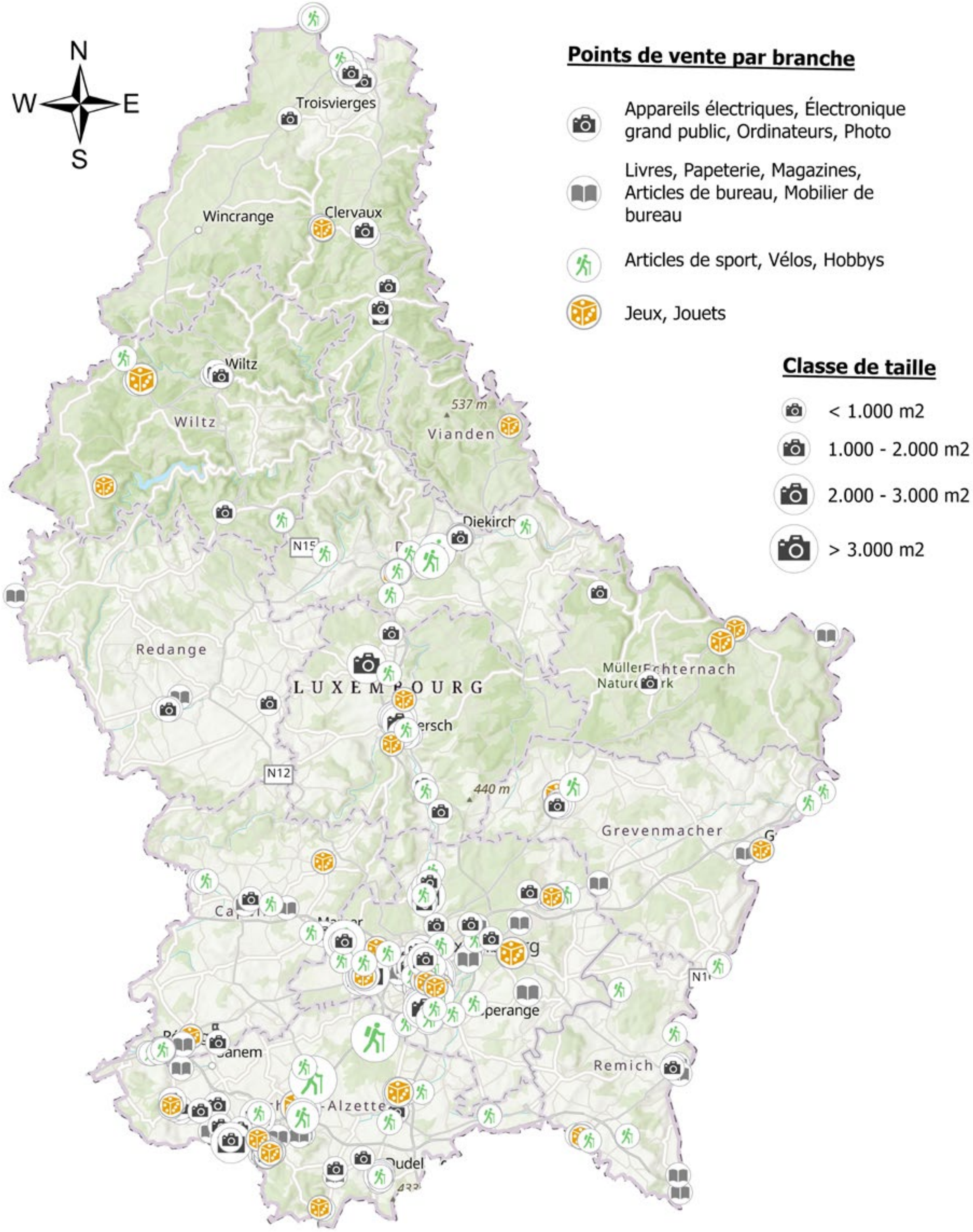
Quick overview of the “Leisure & Culture” category

- Net turnover (2025): **≈ €1,080 million**
  (own calculation; source: Statec)
- Number of establishments: **361 (−2.2% since 2019)**
- **12.8% of all establishments** in the retail sector
- Total sales areas: **102,310 m² (+4.0% since 2019)**
- **10.0% of total sales areas** in the retail sector
- Sales areas per inhabitant: **0.15 m²**
- Chain-store share: **42.7% (base = 361 establishments)**
- Share of establishments with their own online shop: **48.2% (base = 361 establishments)**

Discover the “Leisure & Culture” category by sector and size class

Overview of the "Leisure & Culture" category

by branch and size class

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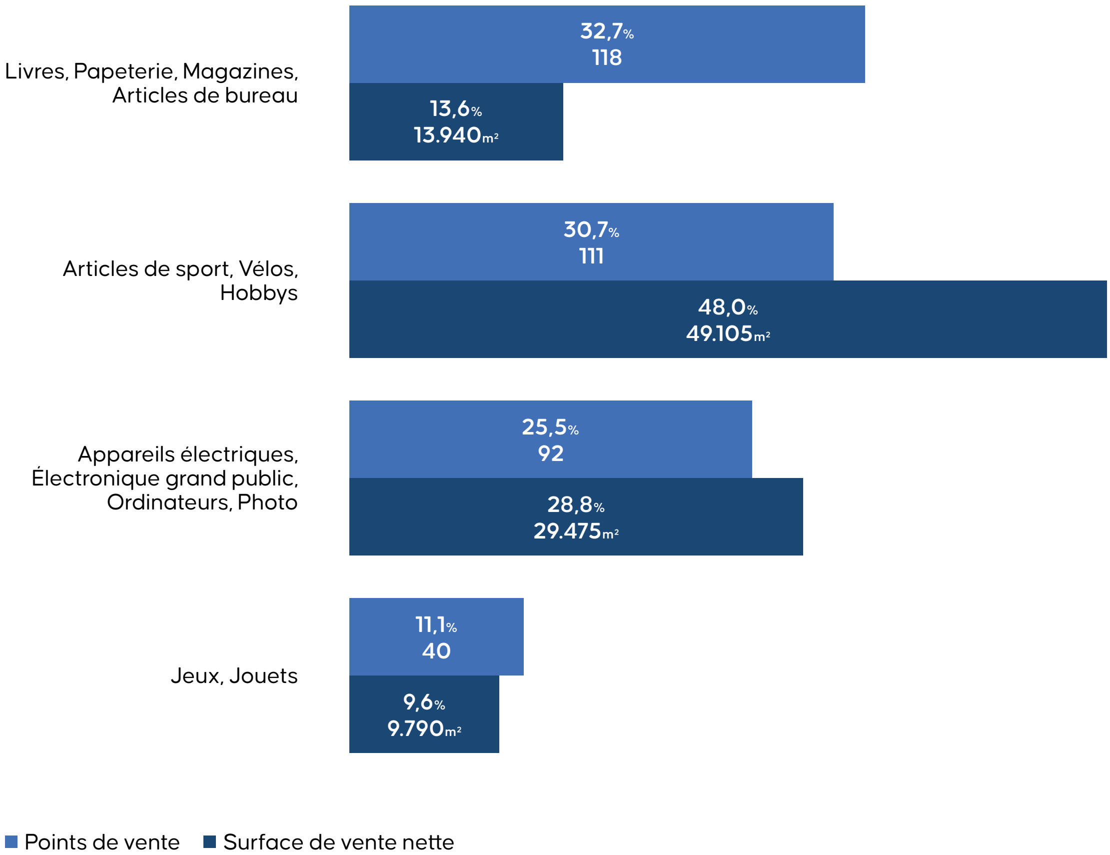
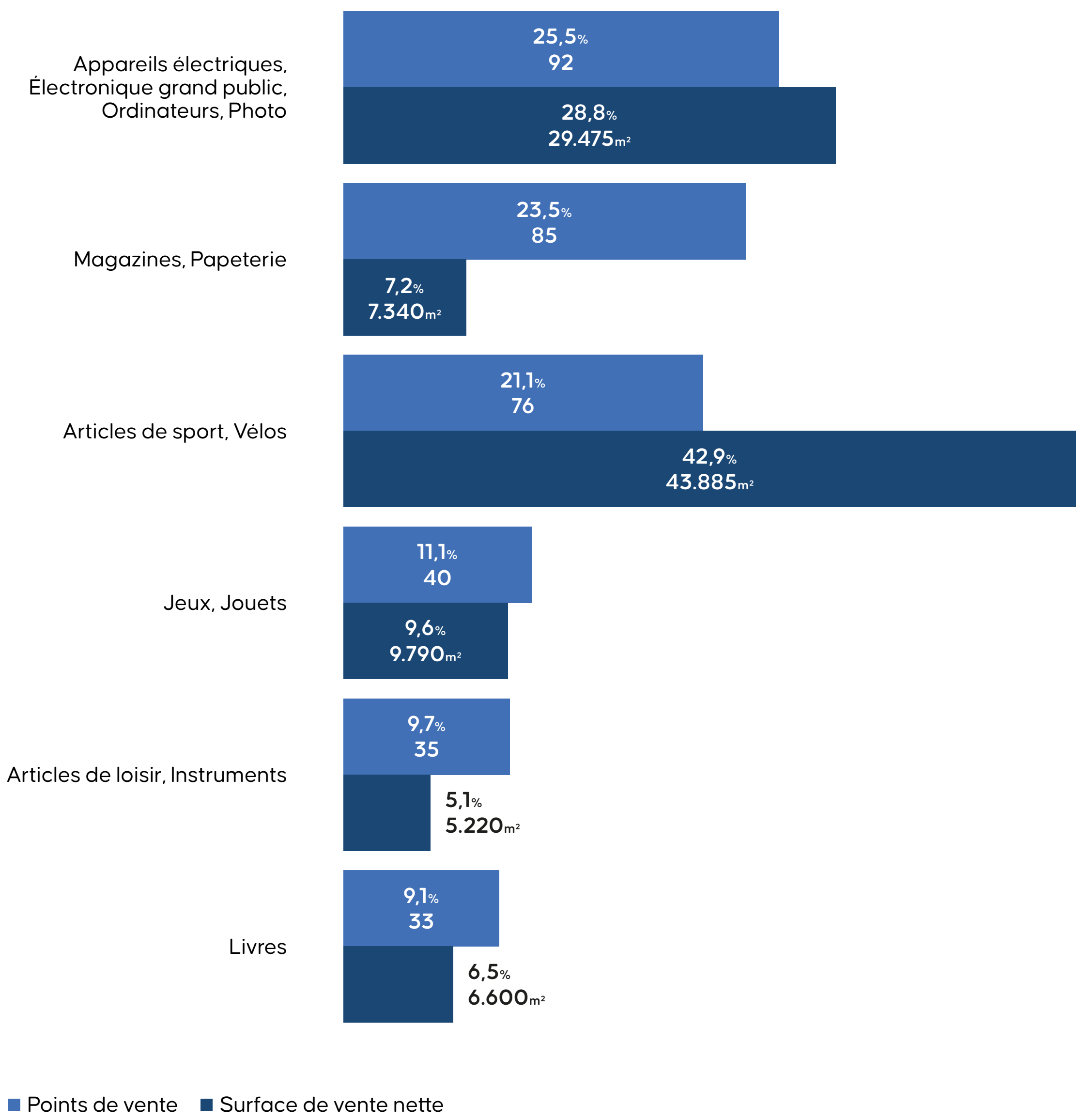
Distribution of establishments and net sales areas

by sector



Distribution of establishments and net sales areas

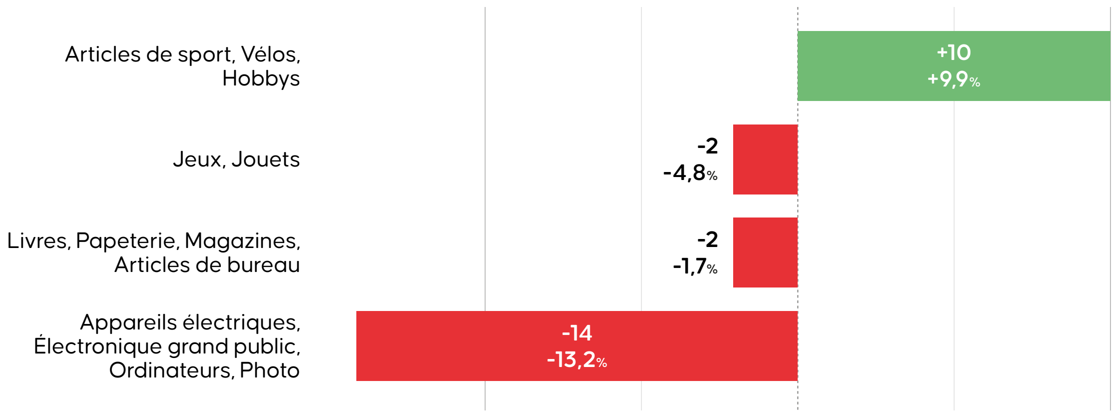
by subsector



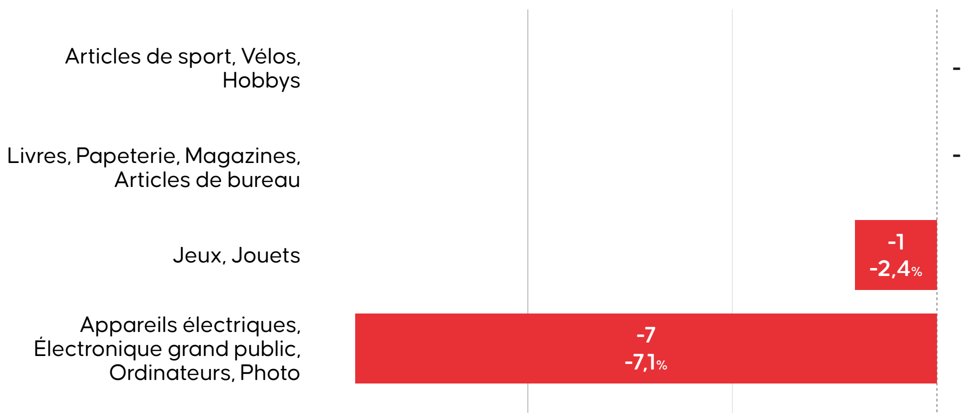
Evolution of establishments

by sector

Evolution of establishments by sector, 2019-2025



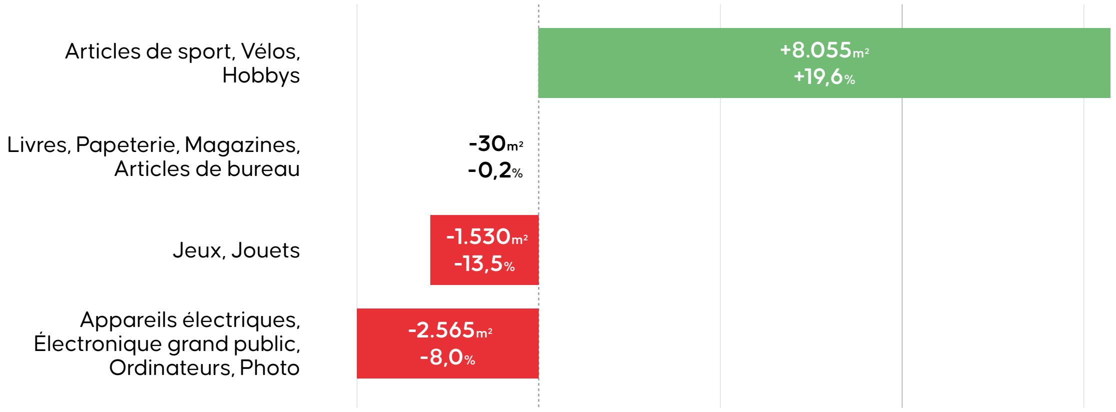
Evolution of establishments by sector, 2024-2025



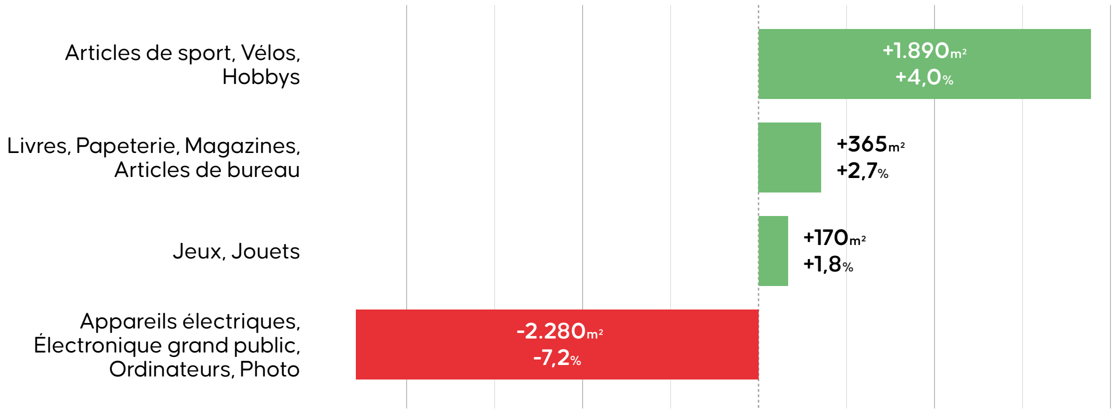
Evolution of net sales areas

by sector

Evolution of net sales areas by sector, 2019-2025

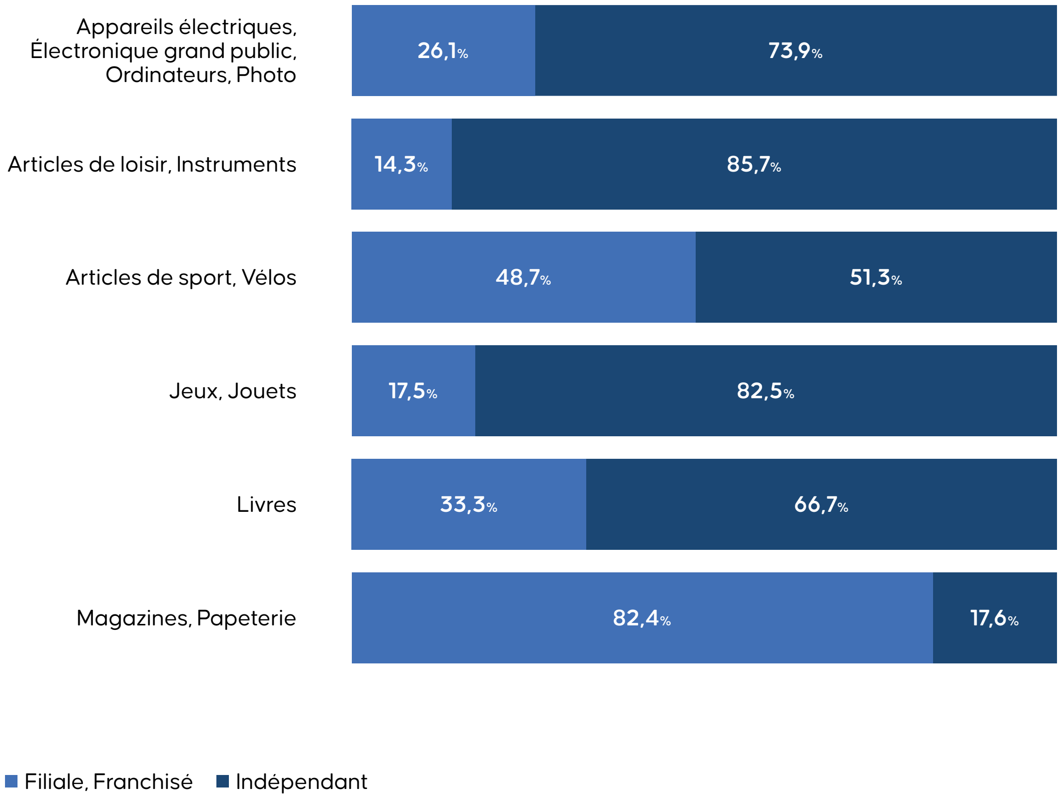


Evolution of net sales areas by sector, 2024 - 2025



Breakdown of points of sale

by business model



06.01.05 | **Other Retail**

	Main Sector	Sub-Sector
35 POI 6.150 m²	Car and Motorcycle Accessories	-
139 POI*	Cars and Motorcycles	-
60 POI 4.710 m²	Cut Flowers	-
58 POI 30.915 m²	Garden equipment, Pet supplies	• Pet supplies • Garden equipment
149 POI 11.385 m²	Eyewear, Hearing aids, Health care products	• Hearing Aids • Orthopedic and Health Products • Optics
23 POI 945 m²	Tobacco	-

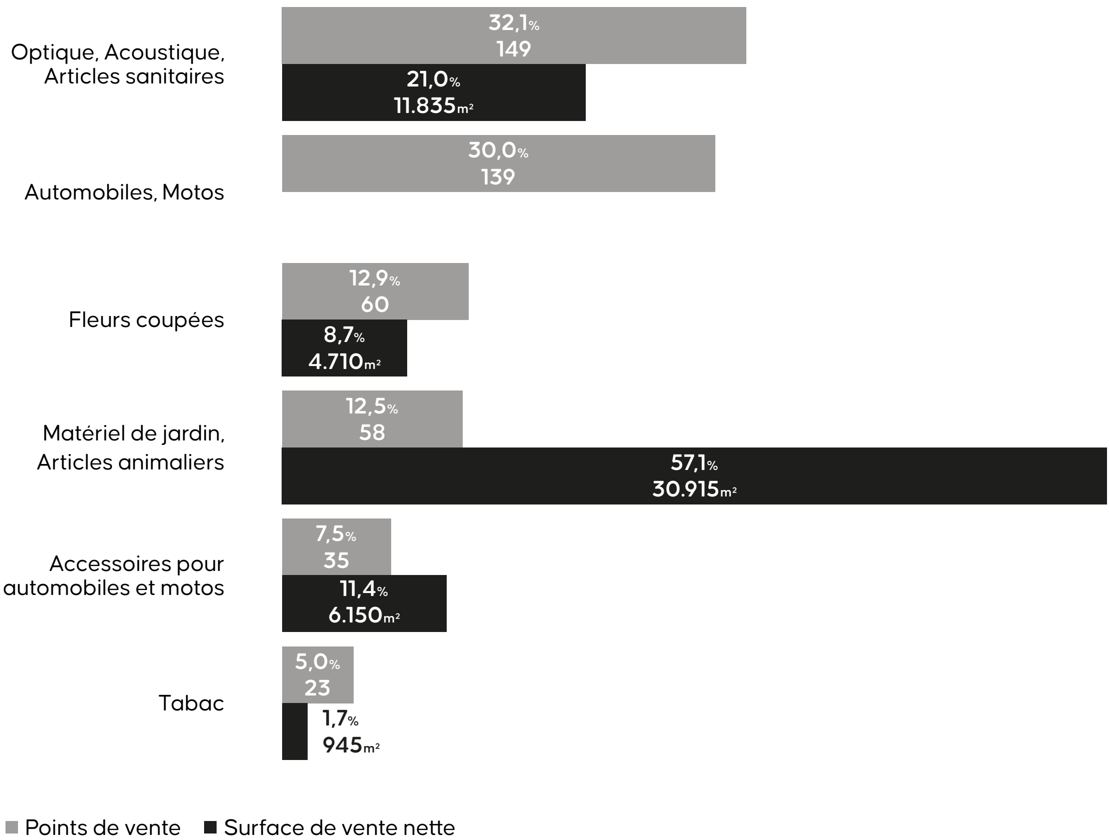
**Exact retail floor space data for the Automobiles and Motorcycles sector are not available.*

Quick overview of the "Other Retail" category

- Turnover (2025): **N/A**
- Number of establishments: **464 (+50.2% since 2019)**
- **16.4% of all establishments** in the retail sector
- Establishments with sales areas exceeding 1,000 m²: **4**
- Total sales areas: **54,105 m² (−1.8% since 2019)**
- Sales areas per inhabitant: **0.08 m²**
- Chain-store share: **59.7% (base = 464 establishments)**
- Share of establishments with their own online shop: **28.2% (base = 464 establishments)**

Distribution of establishments and net sales areas

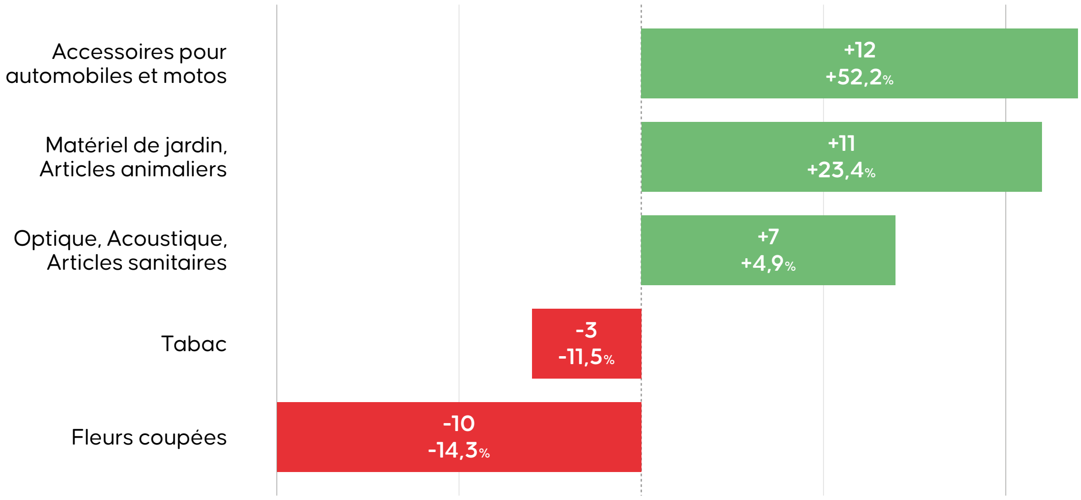
by sector



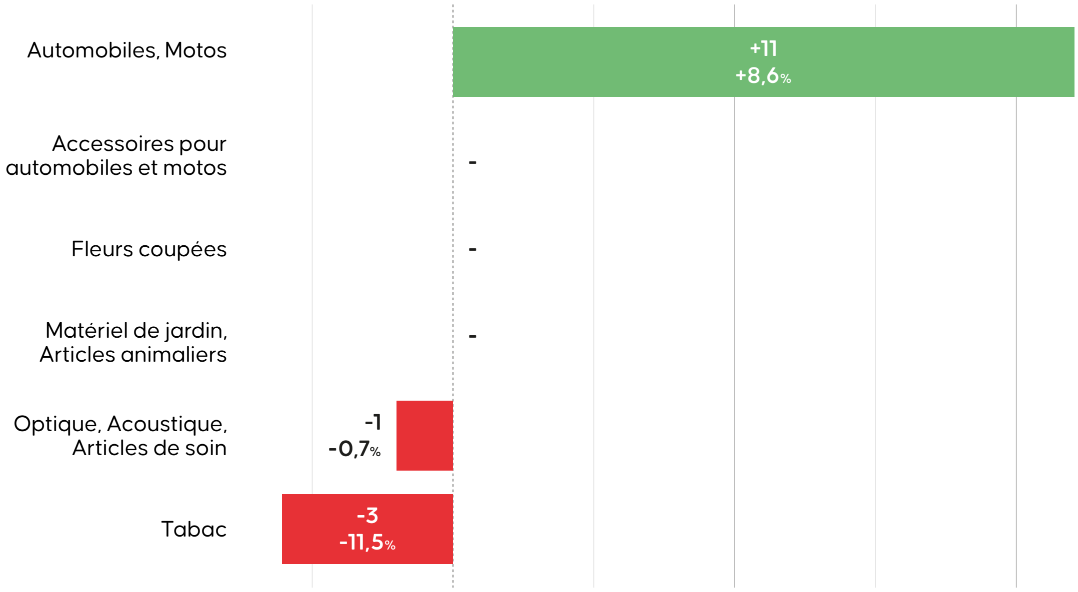
Evolution of establishments

by sector

Evolution of establishments by sector, 2019-2025



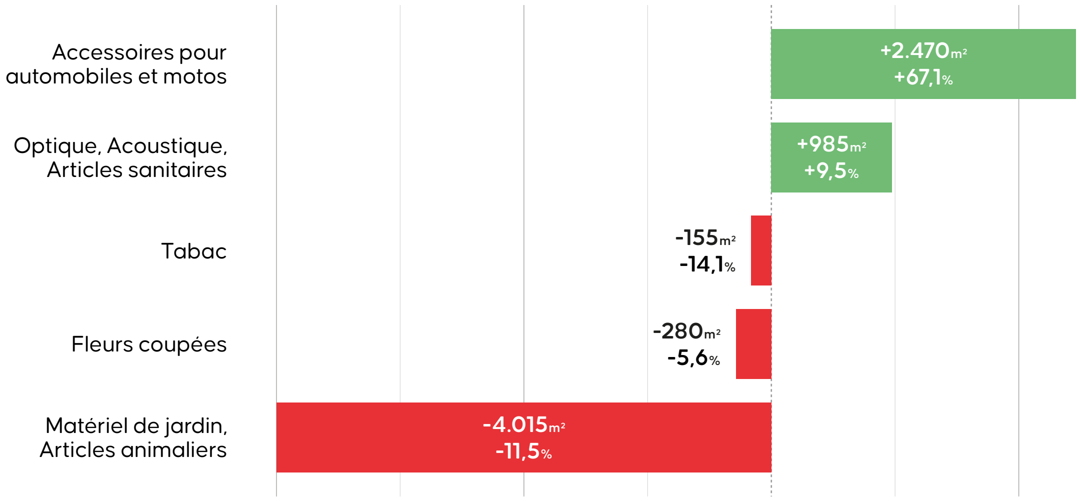
Evolution of establishments by sector, 2024-2025



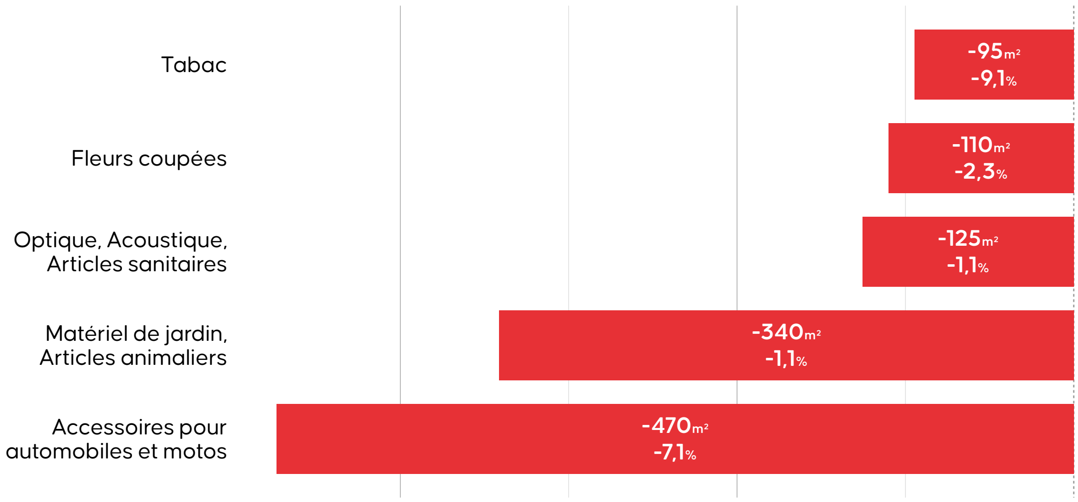
Evolution of net sales areas

by sector

Evolution of net sales areas by sector, 2019-2025



Evolution of sales area by branch, 2024-2025



06.02 | **The Horeca sector**

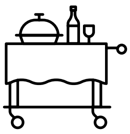
Discover the Horeca

Quick overview of the Horeca sector

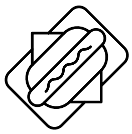
- Number of employees (2024): **23,900 (+9.6% since 2020)**
- **4.6% of all employees and self-employed persons (2024)**
- Number of establishments: **2,597 (+3.4% since 2019)**
- Number of establishments in the canton of Luxembourg: **980 (37.7% of the total)**
- Number of establishments in the canton of Esch-sur-Alzette: **706 (27.2% of the total)**
- Share of establishments located in city center (n = 21): **34.7% (900 POIs)**
- Overnight stays (2024): **3.6 million → +3.7% compared to 2023**

Distribution of the Horeca

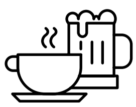
sector by category



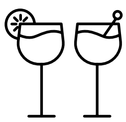
Restaurants: 1,270



Fast food: 389



Bistro, café, ice-cream shop: 470

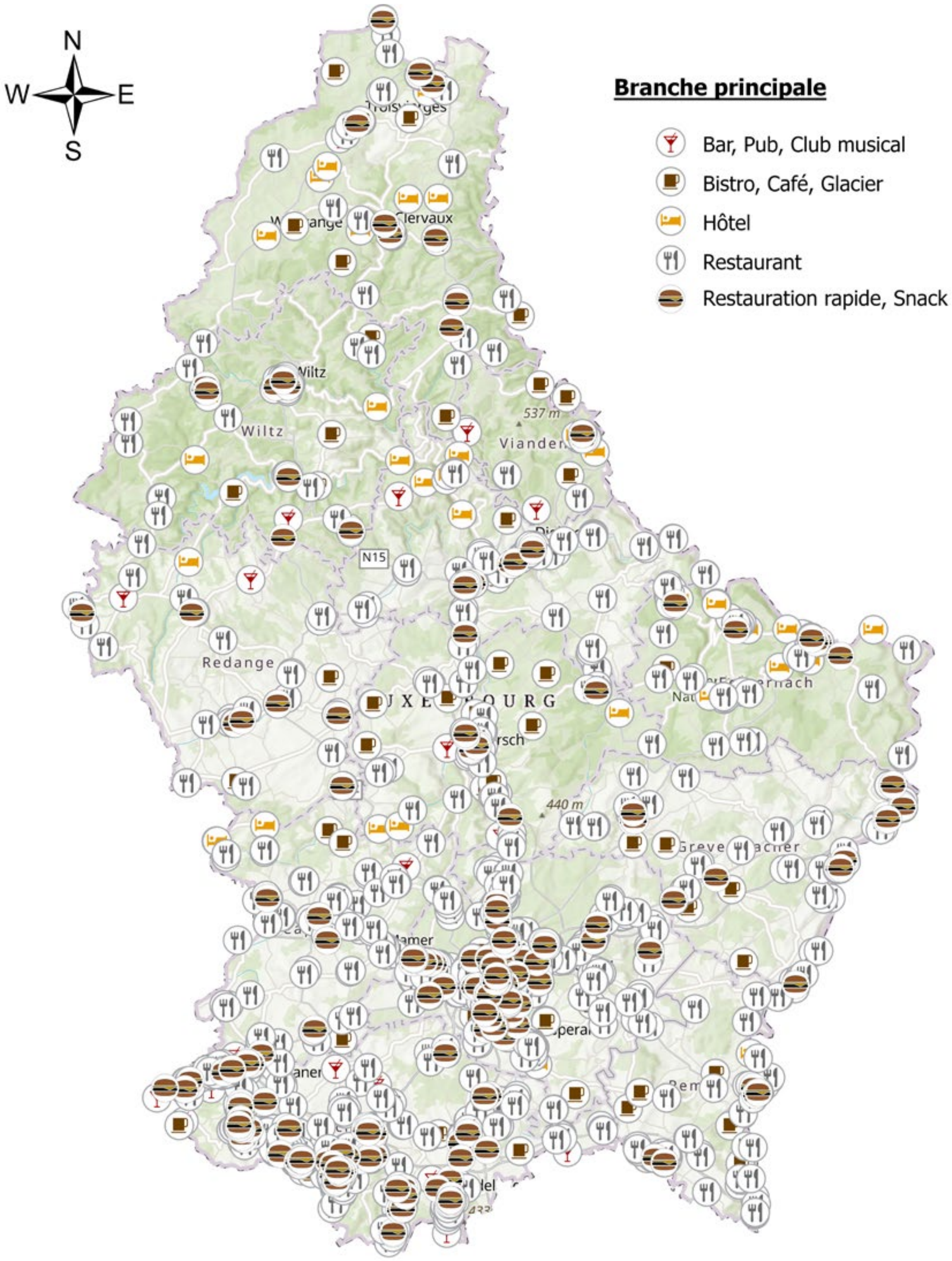


Bar, pub, music club: 269

Hotels: 199

Overview of the Horeca sector

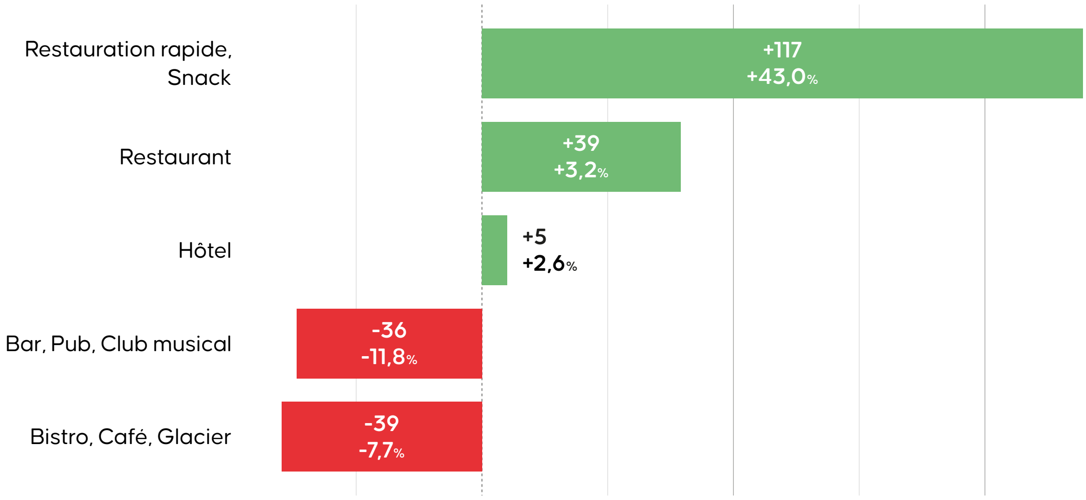
by segment



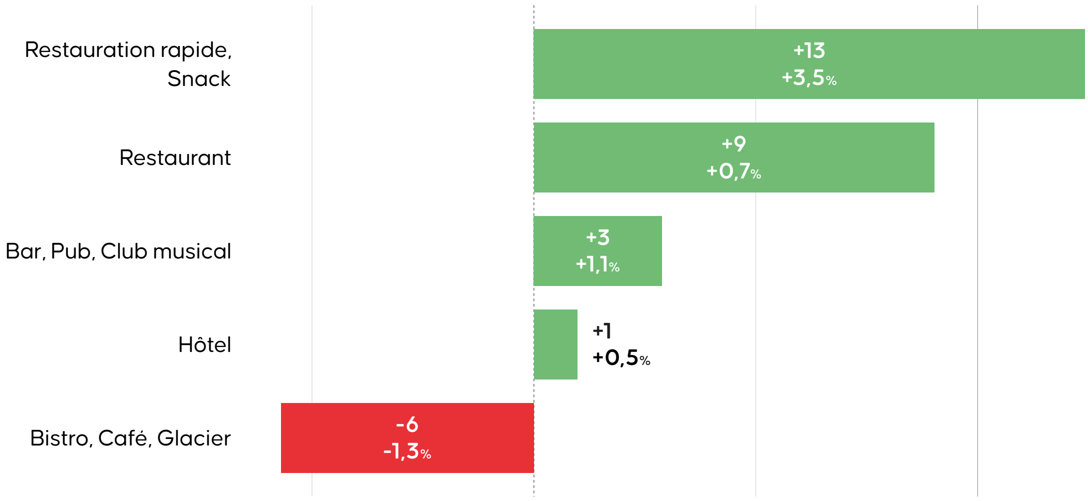
Evolution of the number of establishments

by sector

Evolution of the number of establishments by sector, 2019-2025

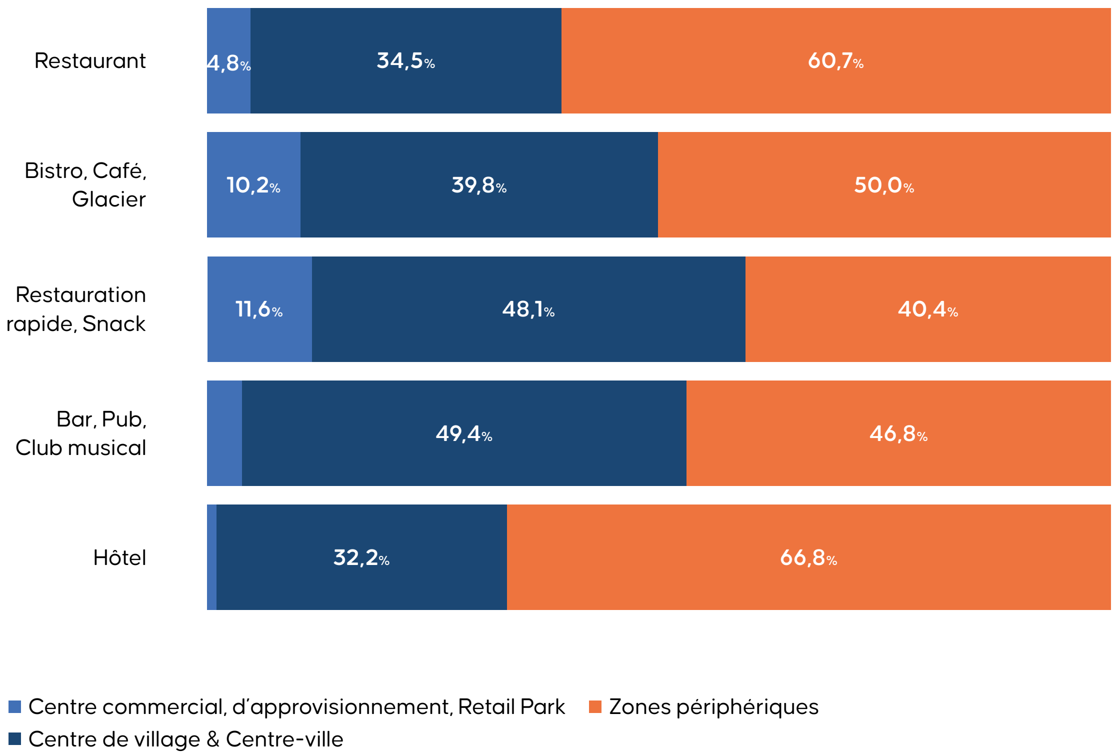


Evolution of the number of establishments by sector, 2024-2025



Distribution of the number of establishments

by location



06.03 | **Vacant properties**

Regarding commercial vacancy data, it should be noted that vacant floor space was not recorded systematically across the entire country, but only at commercially significant locations. Only properties that, in the opinion of experts, are suitable in the short term for future use in retail trade, food service, crafts, or the service sector, or whose future use is expected to have positive revitalization effects for a commercial site, were included in the statistics. For methodological reasons, vacant residential real estate was not included.

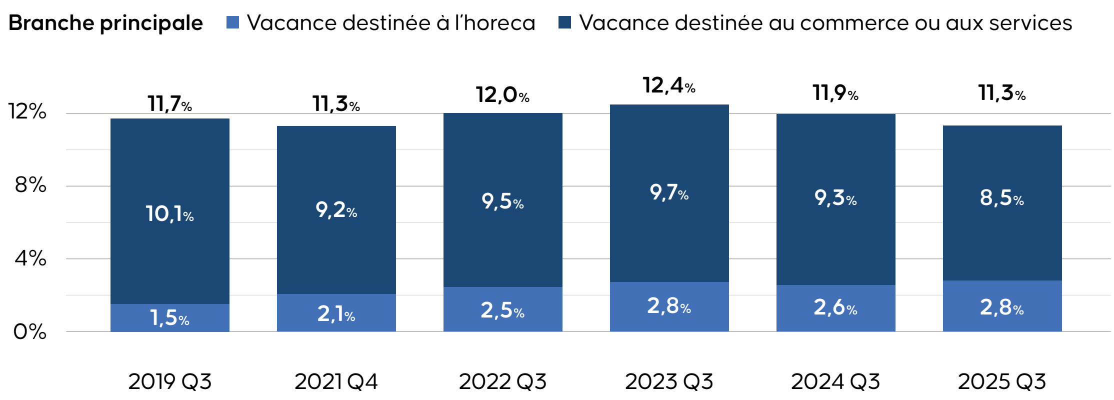
Since commercial vacancies must be distinguished according to their potential future use, they have been classified into two types:

- **Type 1: Retail / services –** refers to premises whose future use is primarily suitable, at least in the short term, for retail businesses and service companies.
- **Type 2: Horeca –** refers to premises whose future use is primarily suitable, at least in the short term, for food-service activities, due to their characteristics.

** Vacancy rate describes the share of vacant premises relative to the total number of retail, food-service, and service establishments within the same territorial unit.*

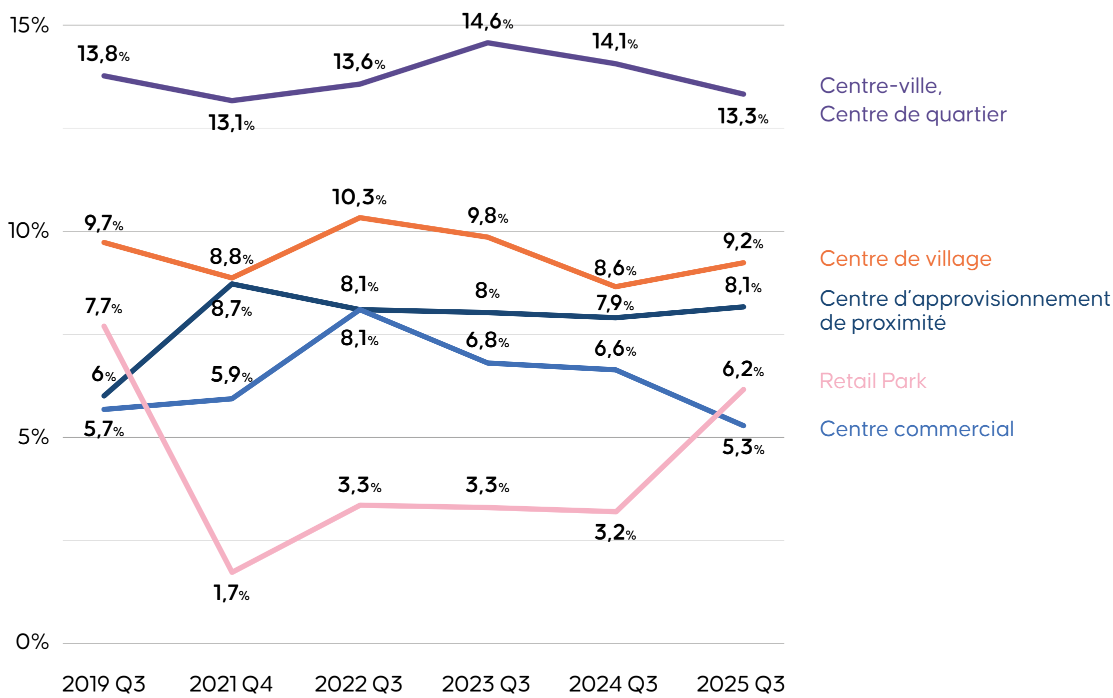
Evolution of the national vacancy rate

by vacancy type (2019–2025)

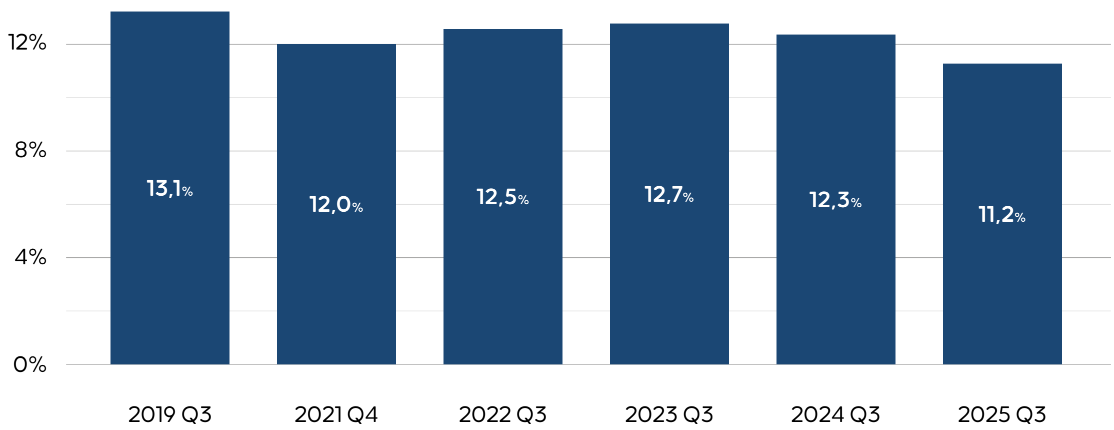


Evolution of the vacancy rate

by location (2019–2025)

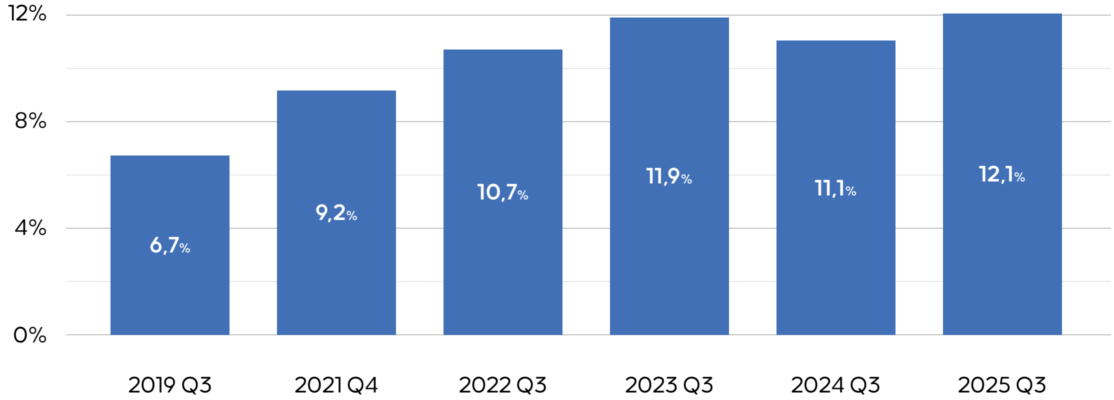


Evolution of the vacancy rate of POIs intended
*for retail or services (2019–2025)**



$$* \quad \frac{\textit{Vacancy intended for commerce or services}}{\textit{(Retail + Food Retail + Services + Vacancy intended for retail or services)}}$$

Evolution of the vacancy rate of POIs intended
*for the Horeca sector (2019–2025)**



$$* \quad \frac{\textit{Vacancy intended for horeca}}{\textit{(Horeca + Vacancy intended for horeca)}}$$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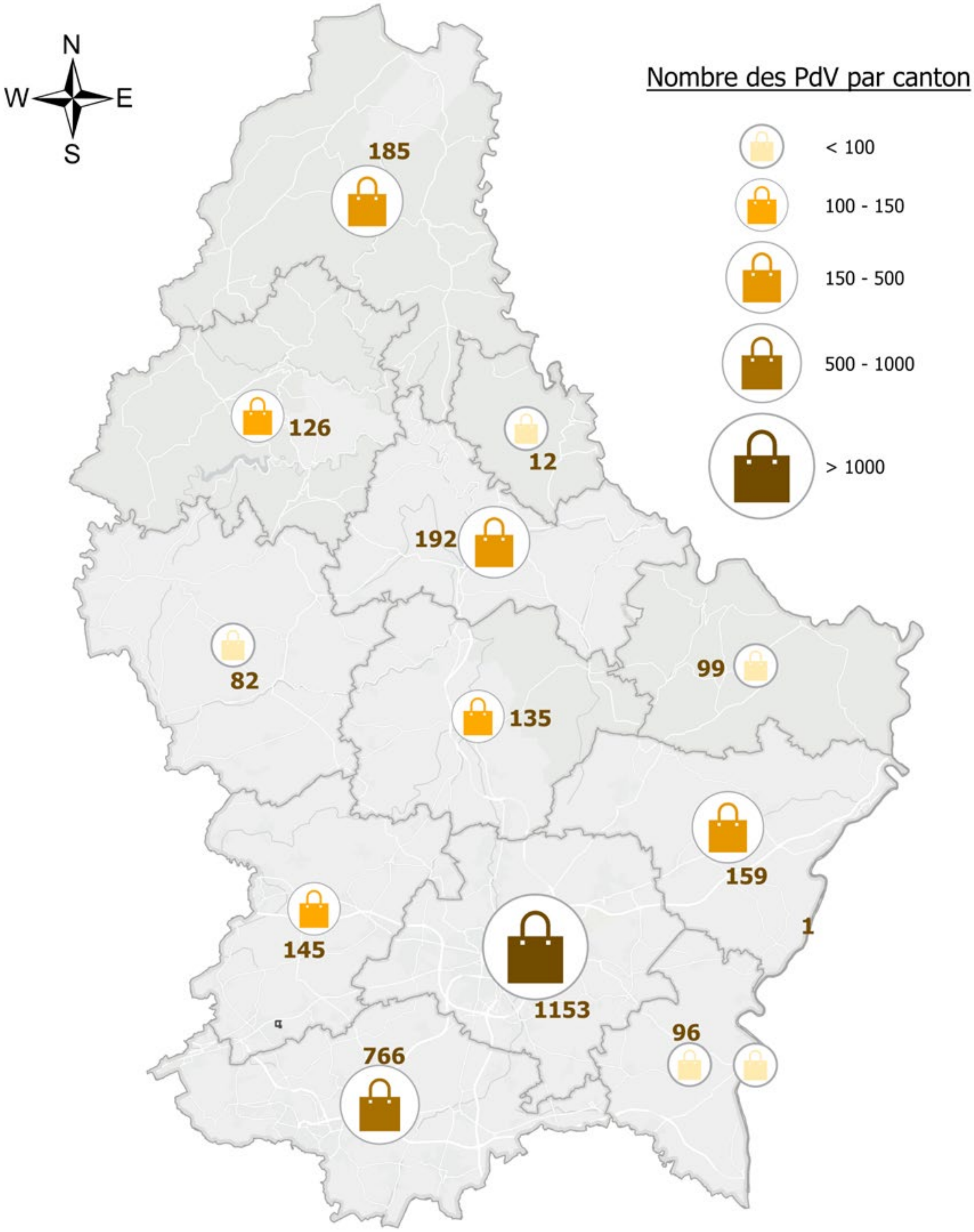
07 | Geographic Distribution of the Commercial Landscape

This section analyzes the distribution of commercial Points of Interest (POI) and sales areas by canton through interactive maps. These visualizations make it easier to understand commercial density and regional disparities, providing an essential overview for assessing territorial retail dynamics in Luxembourg.

07.01 | By Canton

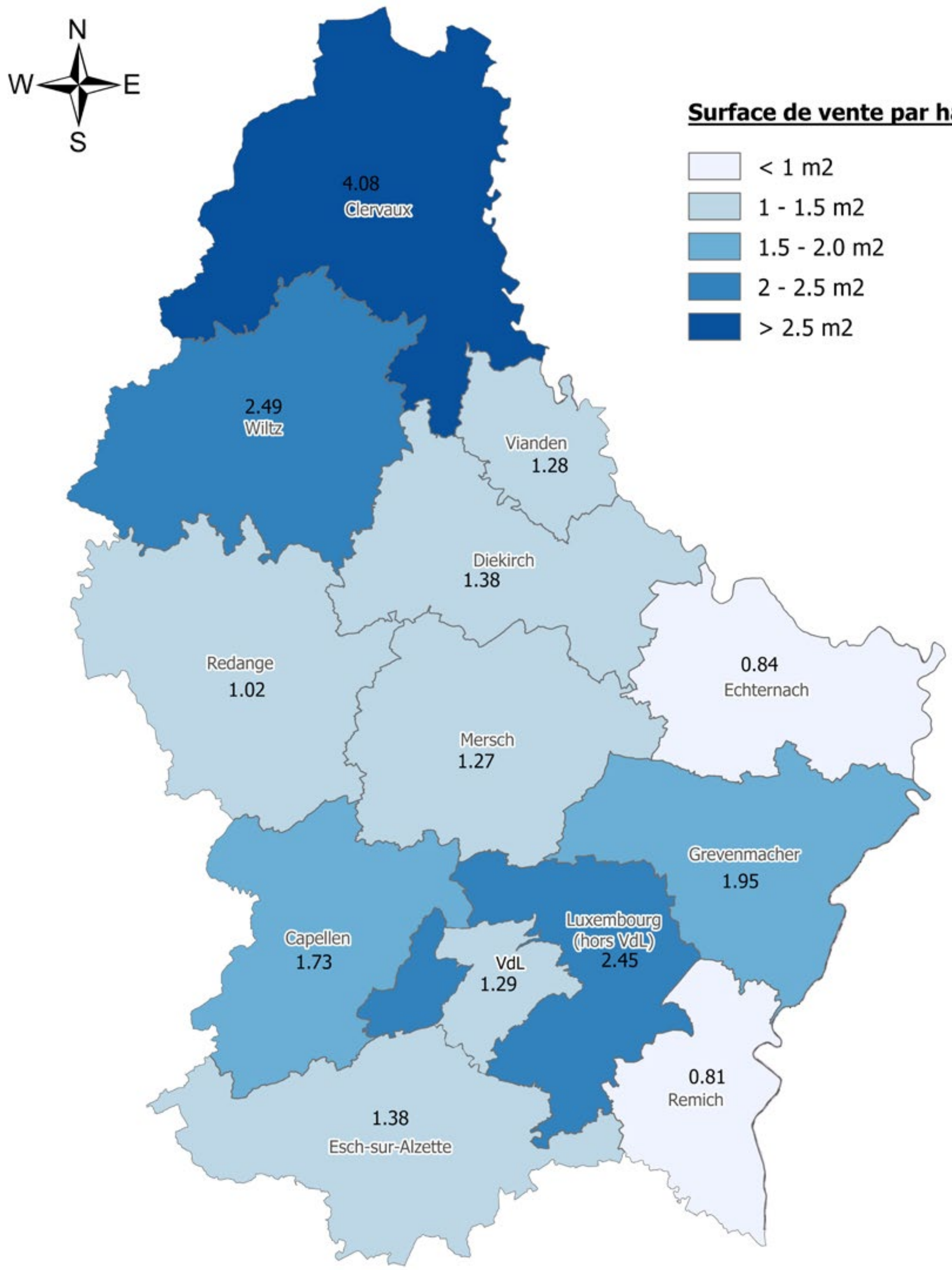
Distribution of retail stores

by canton



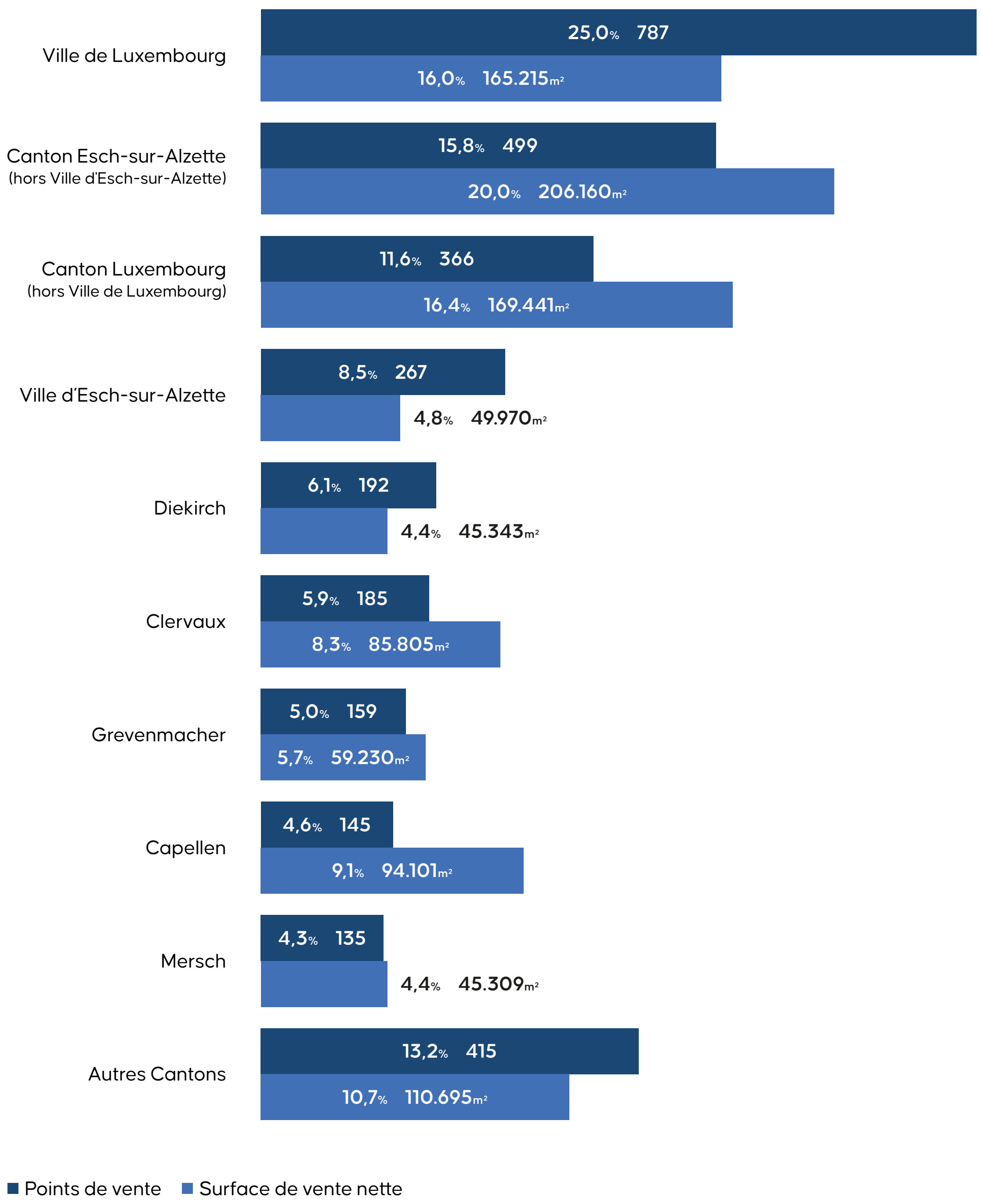
Sales area

per capita and by canton



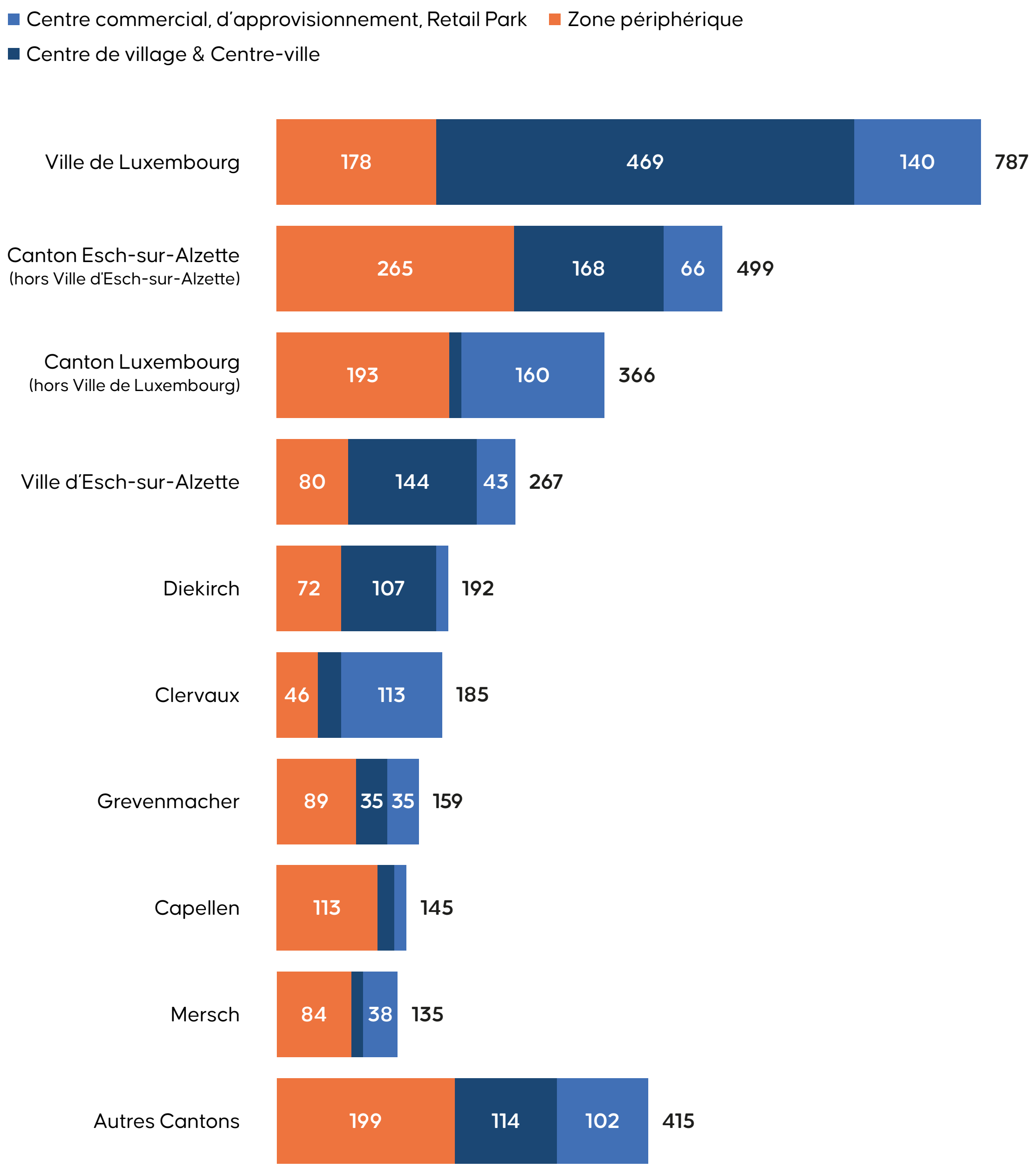
Breakdown of points of sale and net sales area

by canton



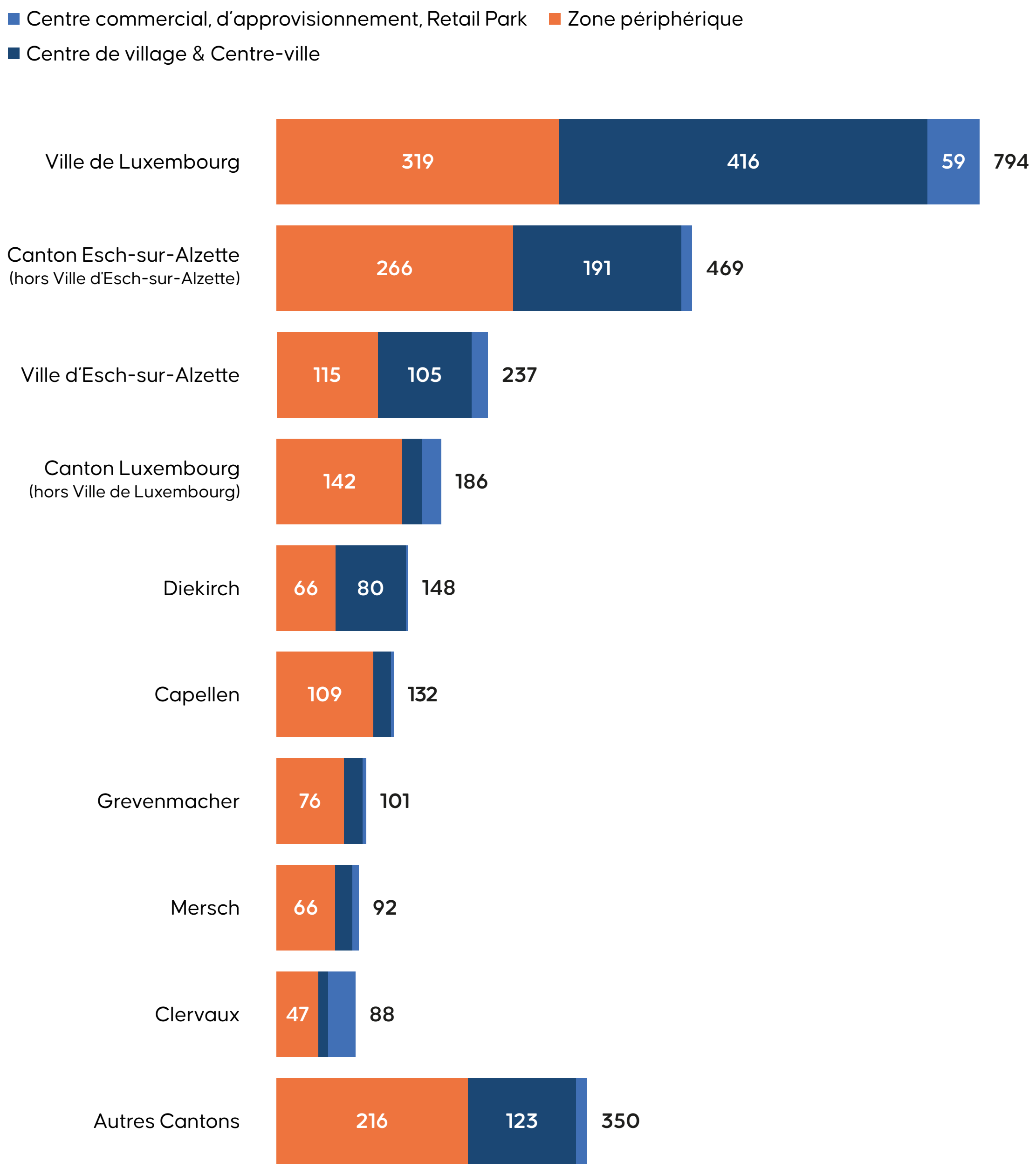
Breakdown of points of sale

by canton and location



Breakdown of HORECA establishments

by canton and location



07.02 | By Location Category

The following chapter provides an overview of business supply and sales areas by selected location categories. Special attention is given to the relationship between city center and peripheral locations. Which locations have the highest number of establishments and sales areas? How have different locations evolved since 2019, and what challenges might they face in terms of site development? What trends can be observed in specific retail sectors? The following statistics aim to answer these questions.

In general, five location categories are distinguished as commercially significant locations in line with the objective of the study (see Chapter 4). In addition to urban-planning considerations ("city center and district centers" vs. "dispersed and secondary locations"), the decisive criteria for categorization include the distinction between forms of commercial agglomeration and cooperation ("shopping centers" and "local supply centers").

Overview of location categories

	Nombre des sites
a) Centre-ville, centre de quartier	21
b) Centre de village	15
c) Centre commercial	14
d) Centre d'approvisionnement de proximité	29
e) Retail Park	5
Autres sites périphériques*	

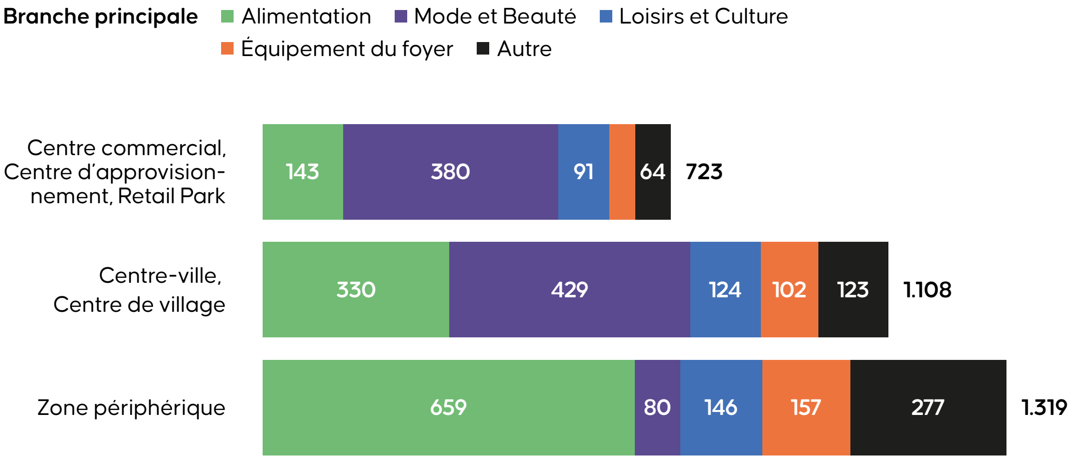
**Tous les autres sites qui ne relèvent pas des catégories a) à e).*

Overview of sites of commercial importance

Overview of sites of commercial importance

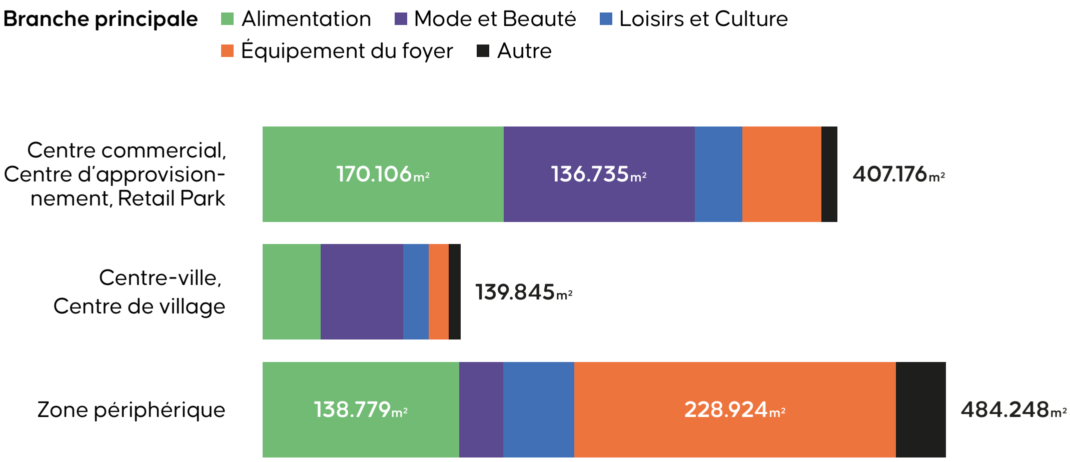
Breakdown of points of sale

by location and category



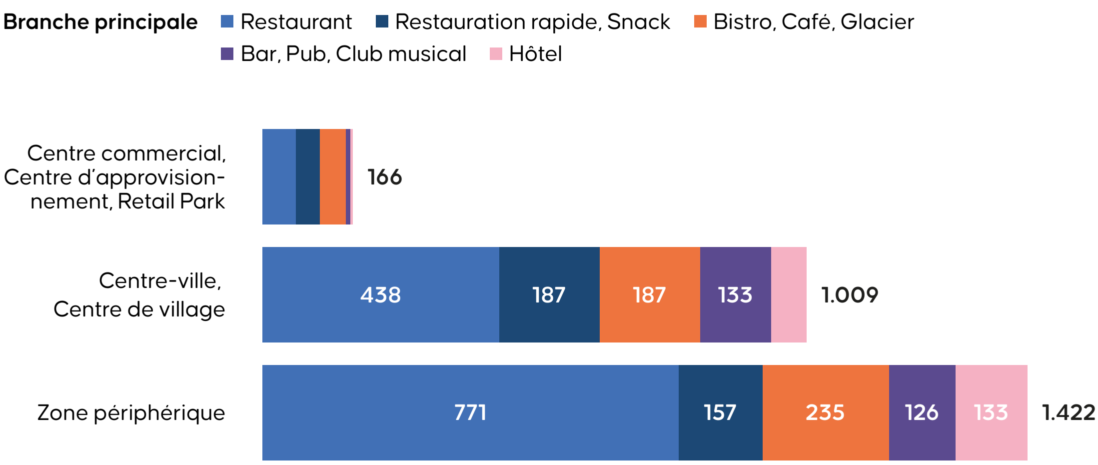
Breakdown of net sales area

by location and category



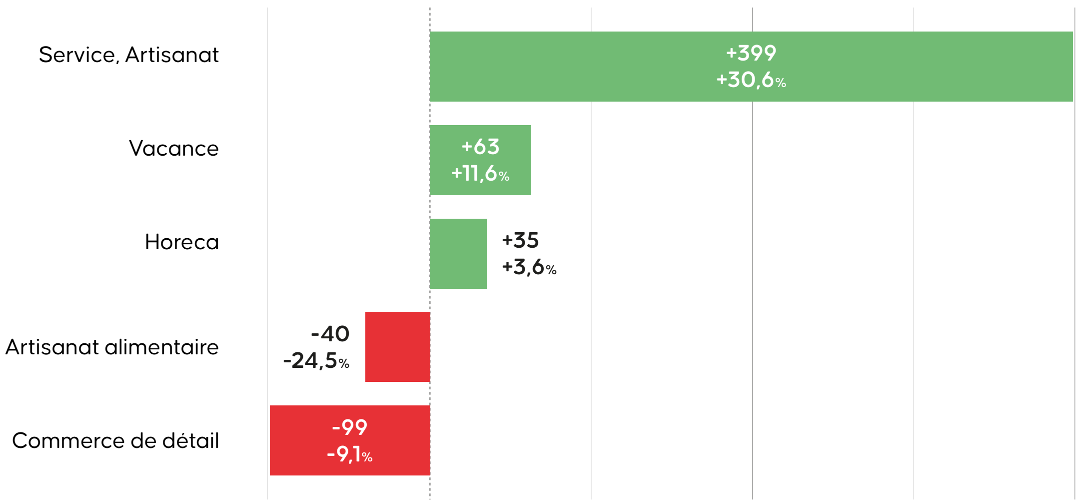
Breakdown of HORECA establishments

by location and branch



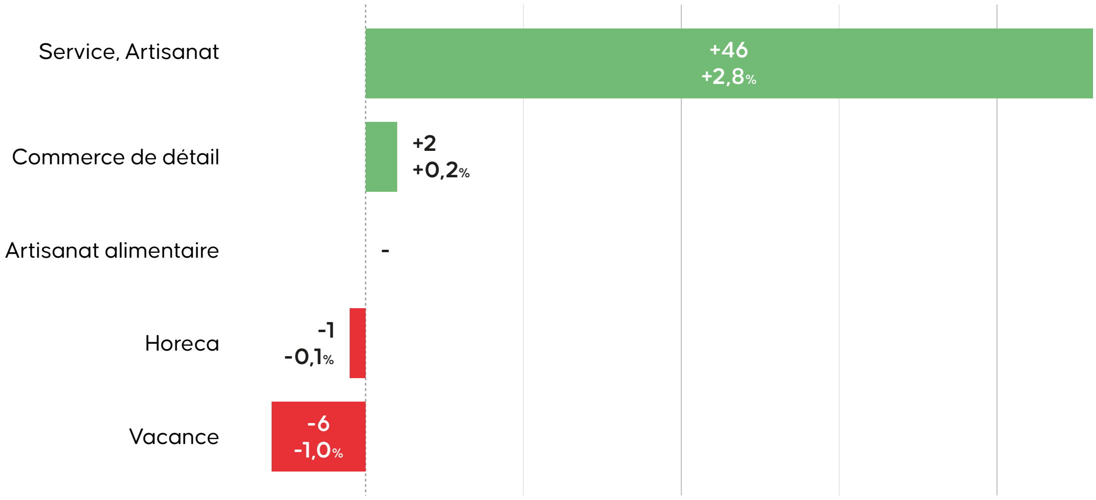
Change in POIs by sector

in city centers and village centers (2019–2025)



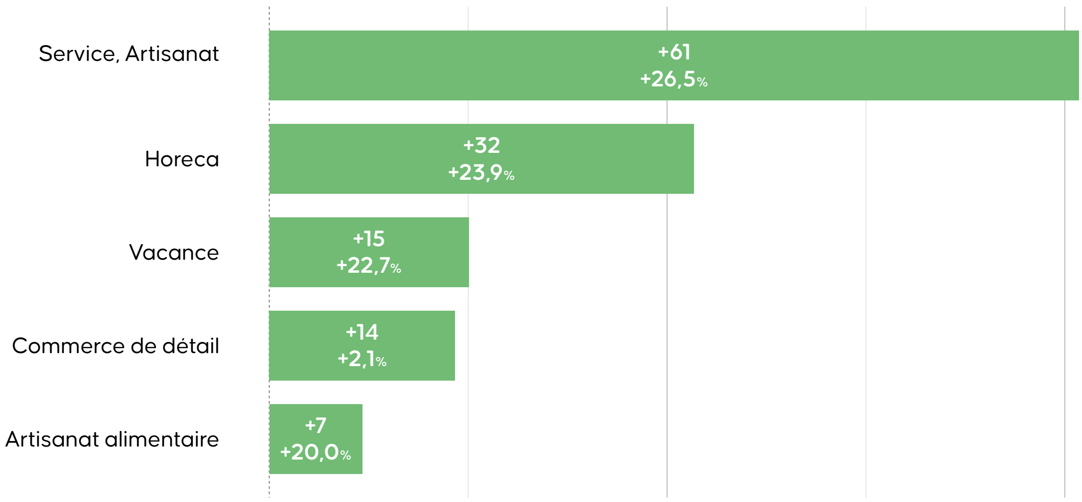
Evolution of POIs by sector

in city centers and village centers (2024-2025)



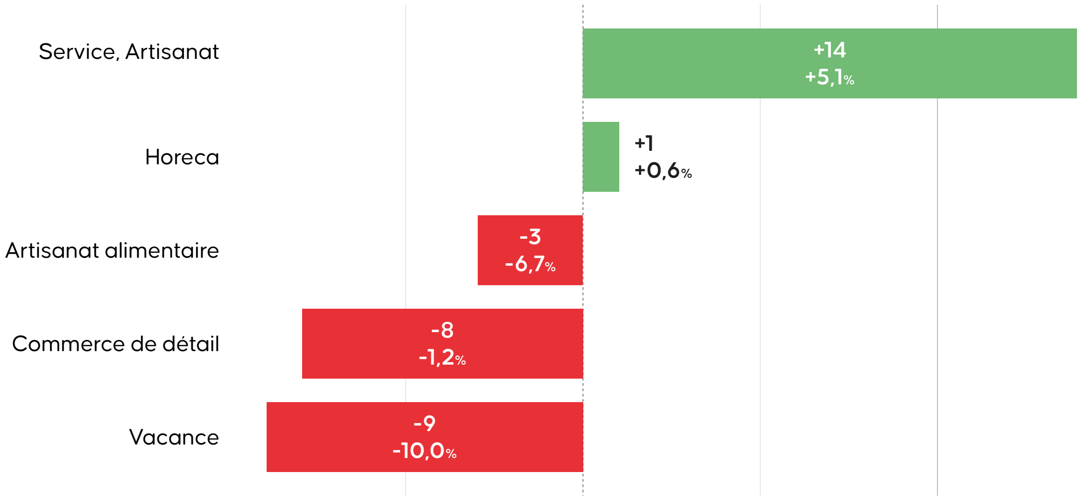
Evolution of POIs by sector

in shopping centers, local supply centers, and retail parks (2019-2025)



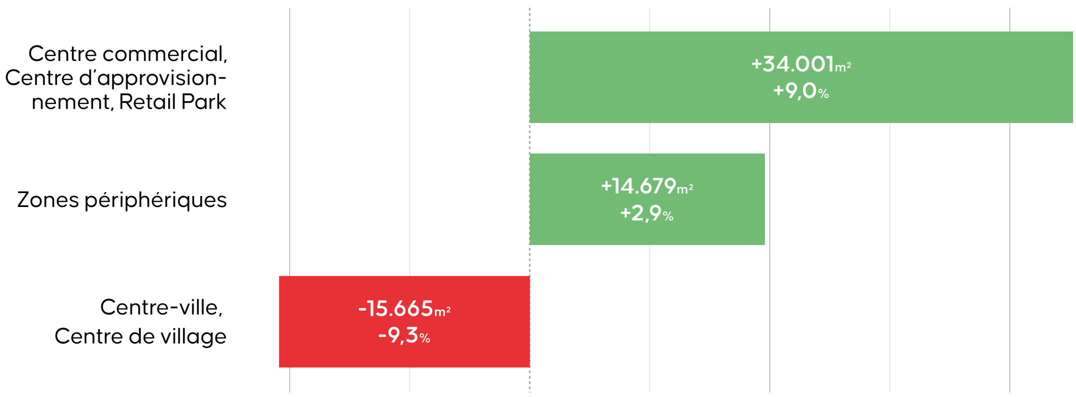
Evolution of POIs by sector

in shopping centers, local supply centers, and retail parks (2024–2025)



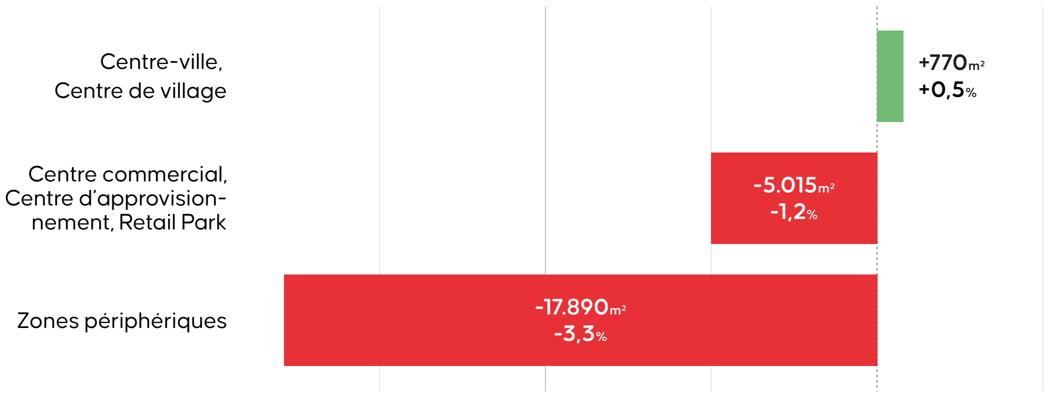
Evolution of net sales area

by location (2019–2025)



Evolution of net sales area

by location (2024-2025)



08 | Summary and observations

Business stock and sales areas (2019–2025)

At the end of the third quarter of 2025, the total commercial floor space of all businesses studied in the Grand Duchy amounted to almost 1.09 million m^2, corresponding to 1.58 m^2 per capita for the country's approximately 684,000 residents. The decline in sales areas observed since 2023 has continued over the past twelve months. Driven by ongoing population growth, sales areas per capita has fallen to 1.58 m^2, its lowest level since nationwide retail data collection began in 2019. This may be explained, among other factors, by the continued growth of e-commerce, which requires less physical space and increases pressure on traditional sales areas, particularly in sectors such as fashion and consumer electronics, where online retail has recorded strong growth for several years. This development is reflected in the stagnation or decline of sales areas in certain sectors. The evolution of the number of businesses in retail trade (+1.1%) and in the Horeca sector (+3.4%) between 2019 and 2025 indicates overall moderate growth, well below population growth (+10.0%) over the same period.

By sector of activity and branch

While the total number of establishments has remained largely stable since 2019, developments across individual sectors vary significantly:

- Among the "winners" of the past five years is food retail, which recorded a net increase of 110 establishments (+18.9%) and more than 34,000 m^2 (+12.0%) of additional sales areas exceeding population growth over the same period. This growth exceeded population growth (+10.0%) over the same period.
- Specialty beverage retail experienced particularly strong growth, with sales areas increasing by 61.2% and 29 additional establishments since 2019. Other sectors showing growth in both establishments and sales areas include sports and leisure stores, DIY stores, and, to a lesser extent, perfume and cosmetics stores.
- Sectors experiencing declines in outlet numbers since 2019 include food-related crafts, fashion retail, and specialty stores for electrical appliances and consumer electronics.

In the short-term analysis (last twelve months), watch and jewelry stores as well as furniture and home-accessories stores recorded declines in both outlet numbers and sales areas.

For the Food category, which is both the largest and most dynamic among the five categories studied (see Chapter 6.1), several trends can be observed:

- Growth is visible across almost all operational formats, supermarkets (+15,700 m^2), hard-discount supermarkets (+9,600 m^2), and small grocery stores (+3,200 m^2) have all expanded over the past six years.
- Hard-discount supermarkets recorded particularly strong growth, with sales areas increasing by more than 39.4% since 2019.
- The country's growing multiculturalism is increasingly reflected in the retail landscape: there are now 103 grocery stores specializing in international food products, 31.1% more than in 2019.
- Organic shops and farm shops also grew significantly in outlet numbers (+28.6%), but still represent only about 4.5% of the overall food retail sector.

As in retail trade, the Horeca sector shows differentiated developments across activities since 2019:

- The number of restaurants increased moderately (+3.2%), while fast-food establishments recorded above-average growth (+43.0%), reaching 389 establishments. A trend already highlighted in the previous Retail Report and continuing over the past year.
- The group of bars, cafés, bistros, and ice-cream shops recorded a decline of around 9.2% in the number of establishments.

By location category

By the third quarter of 2025, Luxembourg had: 14 shopping center with 515 establishments (16.3% of the total), 5 retail parks with 47 establishments, 29 local supply center with 161 stores, and 232 service-station shops.

The country's 21 city center and district centers, classified as such due to their urban character and diversity of supply, contained 1.015 retail businesses, representing 32.2% of all establishments.

Since 2019, however, a slight decline in retail activity in city center has been observed. Data indicate a reallocation of traditional sales areas toward services and Horeca uses, accompanied by a decline in the relative importance of retail trade in city center from 37.5% in 2019 to 32.2% at the end of 2025 compared with other economic sectors.

In the short term, over the past twelve months, the number of establishments in city center has remained largely stable, suggesting a phase of consolidation following earlier adjustments. This trend observed across Europe, reflects the increasing multifunctionality of city centers, which are increasingly conceived as spaces for experience, services, and social interaction.

Other conclusions on the structure of retail trade

Pop-up stores and showrooms are experiencing strong growth. These flexible and innovative concepts, already well established in other countries, are also expanding in Luxembourg. Since 2019, their number has more than doubled. While pop-up stores are not a structural solution for city-center transformation, they can contribute to increasing the attractiveness of commercial sites and generating revitalizing effects.

Commercial vacancies

Over the past six years, the national vacancy rate has remained relatively stable. After reaching an intermediate peak of 12.4% in 2023, it declined to 11.3%, its lowest level since data collection began in 2019.

About 75% of vacant commercial premises are spaces typically used by retail and service businesses, while 25% are spaces primarily suited to the Horeca sector.

Across location categories, the situation is contrasting. In general, commercial vacancies are more common in city center than in shopping centers.

While the vacancy rate in shopping centers has averaged between 5% and 8% since 2019, the rate in city center has ranged between 13% and 15%. By the end of 2025, it had declined to 13.3%, its lowest level in four years.

This development highlights structural challenges specific to urban centers, particularly complex ownership structures, which make managing retail space more difficult than in shopping centers, where management is centralized. In this context, cities and municipalities would benefit from adopting proactive retail-space management and addressing vacancy issues through new and innovative approaches.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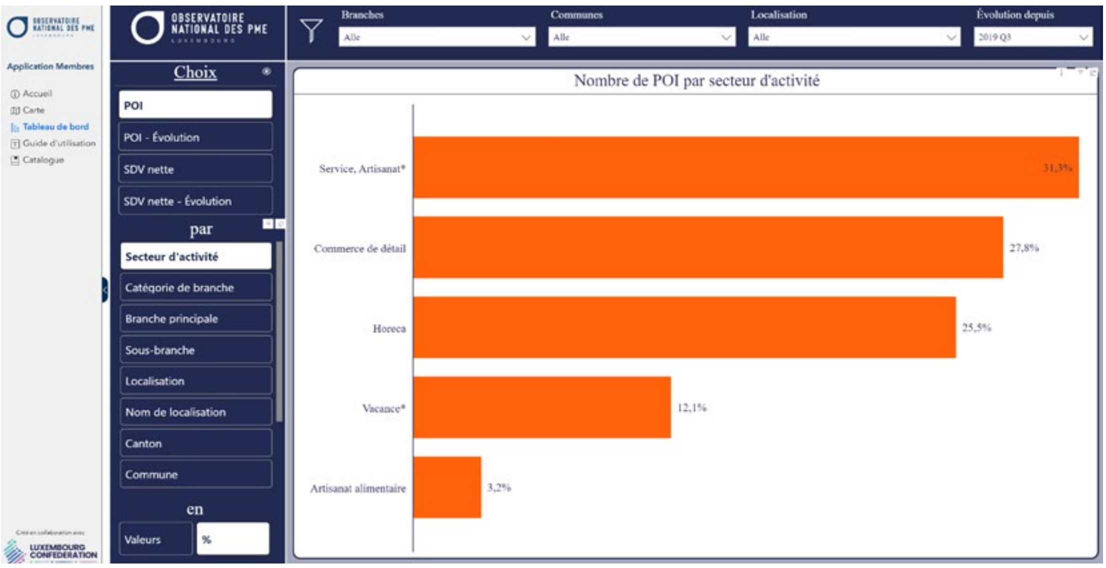
09 | **The Trade Register Service "Cadastre de Commerce"**

As mentioned in Chapter 3, all cities, municipalities, municipal associations, and tourism organizations located in the Grand Duchy of Luxembourg have the opportunity to obtain access to the "Retail Register" tool. This tool can help them better understand their local situation and make informed decisions in the fields of urban development, spatial planning, city marketing, and economic promotion.

Access includes not only raw data on the local commercial landscape, but also additional products and services, including a dashboard specifically designed for project partners and a customized mapping tool. The latter contains, in addition to processed Register data, supplementary market data, for example on retail turnover or purchasing power at municipal level.

In addition, project partners can benefit from complementary advisory services, which are also included in the access package. These include, among other things, a user tutorial that helps users quickly become familiar with the tool and discover its full range of applications.

For more information about the Retail Register tool, please contact us by email at **info@observatoirepme.lu** or by phone.



10 | Localyze.lu – the “site analysis” service for Luxembourg entrepreneurs

Location decisions are becoming increasingly important, particularly at a time when brick-and-mortar retail is facing growing competitive pressure. In addition to new competition from e-commerce, rising rental costs in Luxembourg are making it increasingly difficult for physical retailers to find profitable commercial premises.

To reduce the risks associated with long-term leases, it is important to make data-driven decisions by carefully assessing opportunities and risks. Information about competitors is an important component of a comprehensive set of evaluation criteria. In this context, all interested retailers, restaurateurs, and businesses in Luxembourg can register for the Localyze.lu service, provided by Luxembourg Confederation, to benefit from a detailed location analysis.

Using Retail Register data, Localyze.lu can provide relevant information about competition within your sector of activity. Users can request statistics on national and regional sector developments since 2019, and access an interactive map to better understand the current competitive environment. In addition, a range of complementary sociodemographic data is available to help evaluate the potential of new commercial locations.

Localyze.lu is a key action area of the Pakt Pro Commerce, a policy initiative launched in April 2016.

For more information, visit: **www.localyze.lu**

LOCALYZE.LU
BY PAKT PRO COMMERCE

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