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TCHAI

THE FUTURE OF RETAIL EXPERIENCE

TCHAI TREND REPORT
THE FUTURE OF RETAIL
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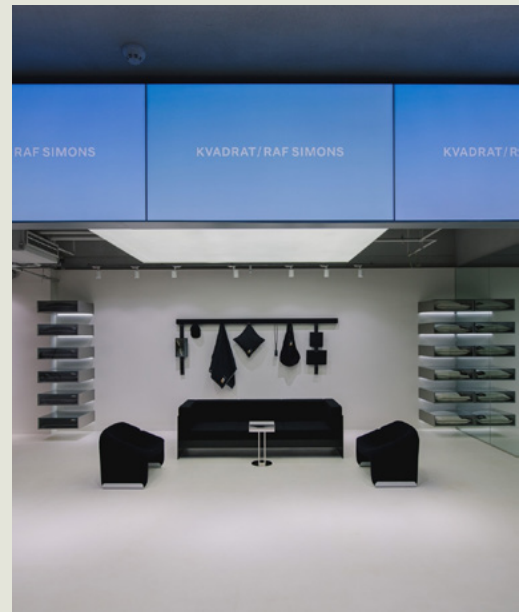
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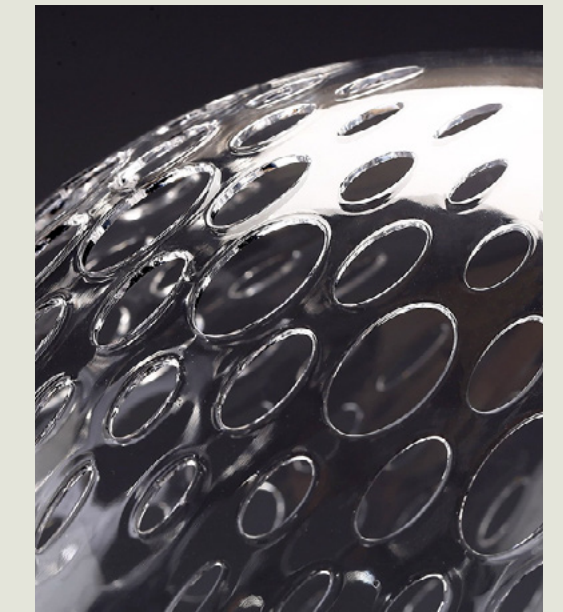
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BUILD DIFFERENT.

● **01** Materials stay visible in their natural state, giving brands credibility

● **02** Texture and tactility become content, shaping how memorable a space feels

● **03** Luxury moves toward precision, reduction and proportion rather than ornament

● **04** Energy and expression remain relevant but within a controlled

● **05** Modularity makes retail faster, smarter and globally scalable

● **06** Digital layers shift from screens to subtle spatial intelligence

● **07** Customer journeys become adaptive: one store, multiple paths based on behaviour

● **08** Efficiency becomes a design principle that elevates both performance and experience

● **09** AI becomes a strategic amplifier that improves concepts before they are built

● **10** Physical retail becomes more human, sensory and intentional and therefore more powerful

KEY INSIGHTS

Our Position in the Changing Retail World.

INTRODUCTION

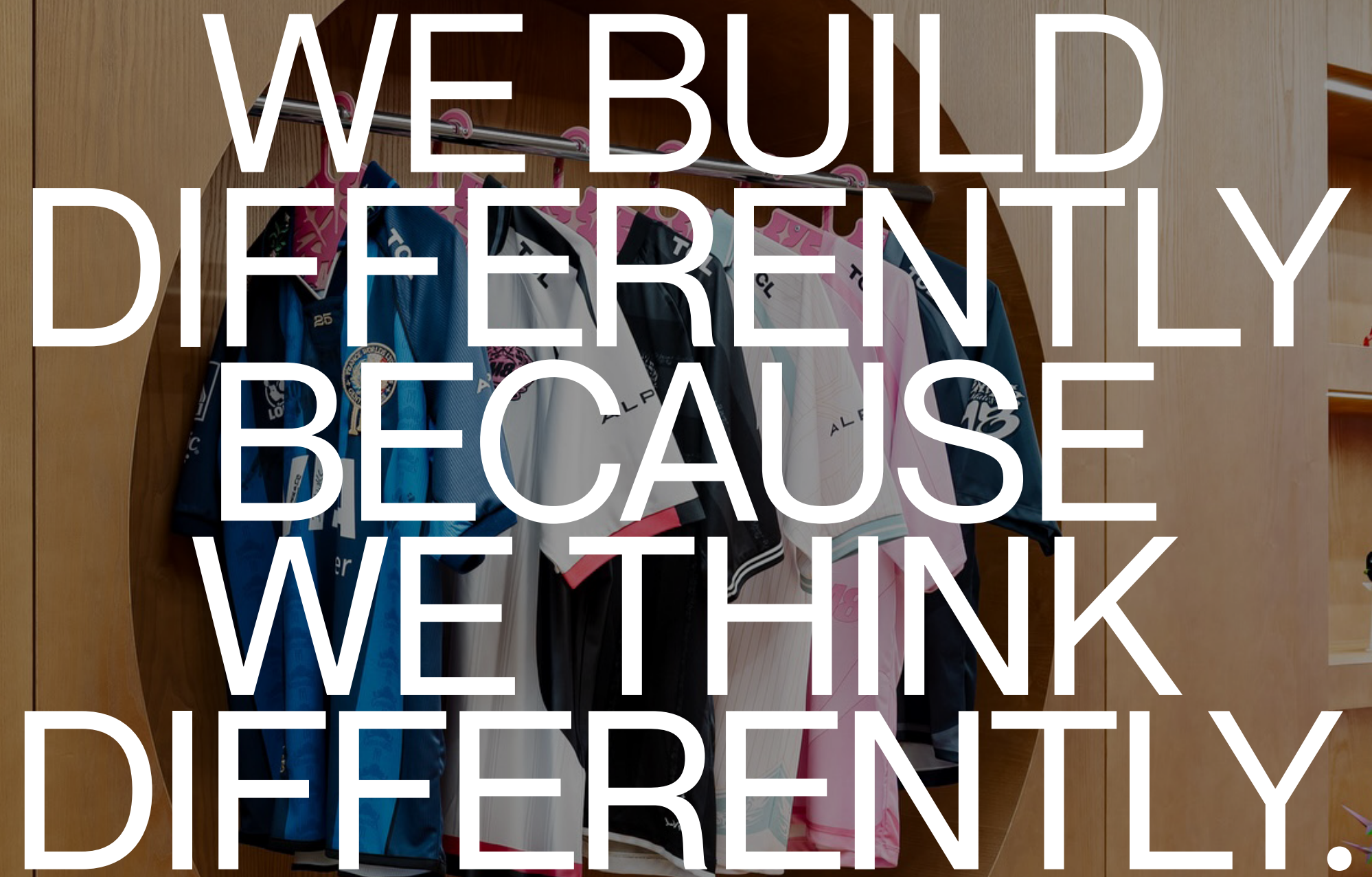
We build where brands meet the physical world. Every day we translate ideas into spaces, systems and experiences that perform in real environments. That position gives us a clear view of how retail is changing and which movements will shape the next phase of physical experience.

We share this perspective because stronger understanding leads to stronger environments. Our work becomes more meaningful when our

partners can see the same shifts we encounter in design studios, production facilities and stores around the world.

This report also reflects what we are bringing to EuroShop 2026. The stand is not a showcase of work but an interpretation of where retail is heading, shaped by the same insights you will find in these pages.

We build differently because we think differently.



WE BUILD
DIFFERENTLY
BECAUSE
WE THINK
DIFFERENTLY.

THE DECISIONS

Every design decision has consequence. A material defines a mood. A layout shapes behaviour. A fixture structure influences speed, cost and global consistency. These movements matter because they sharpen the

decisions behind the space, the decisions that define how a brand feels, how it performs and how it evolves across markets, rollouts and environments. **Design becomes clarity. Clarity becomes performance.**

“Digital becomes spatial and emotional rather than visual and transactional.”

WHAT SHAPES

PERFORMANCE



SKIMS FLAGSHIP STORE,
LOS ANGELES



JACQUEMUS STORE,
PARIS



JIGI POKE,
BERLIN



MATIERE PREMIERE FLAGSHIP STORE,
PARIS

The Store Still Leads the Story.

Physical retail is changing in meaning. **Stores shift from distribution to differentiation.** They become places where identity is made physical and where brands communicate through material, form and light. The world is noisy, so physical space must be clear. These shifts appear most clearly when the global industry gathers to define where retail is moving. EuroShop 2026 is such a moment.

A collective preview of how physical experience evolves, and a reminder that the store remains one of the most persuasive tools a brand has. This report connects aesthetic movements, behavioural signals, operational systems and future-facing intelligence into a single narrative. Not a list of trends. A lens to understand how **experience, design and commerce merge into spatial strategy.**

The Principles of Modern Retail.

Retail is shifting from a place where people come to get something to a place where they come to feel something. Brands are realizing that **emotion doesn't come from adding more decoration**, but from revealing more truth.

A space built on honesty, clarity and intelligent design stays with people longer than a space built only to impress. What works is what feels right. And what feels right, lasts.



ACNE STUDIOS STORE,
STOCKHOLM



GENTLE MONSTER FLAGSHIP STORE,
SEOUL

©

MATERIALS AS BRAND IDENTITY

THE AGE OF POLISH SHIFTS TOWARD TEXTURES, IMPERFECTIONS, AND VISIBLE CONSTRUCTION.



TADAO ANDO-INSPIRED RETAIL ARCHITECTURE,
JAPAN

Raw realism and soft brutalism converge into one movement built on sincerity, tactility and structural calm. The age of polish shifts toward textures, imperfections and visible construction. Surfaces show their grain. Edges reveal how they are made. Materials stay true to their nature: metal remains raw, stone remains veined, timber keeps its knots. What used to be considered unfinished is now understood as unfiltered, and that shift resonates with people who crave authenticity in a world optimised for flawless content.

At the same time, spatial massing gains softness. Monolithic forms curve instead of cut. Colours warm instead of intimidate. Volumes feel sculpted rather than engineered. The result is a quiet strength: **a room that holds weight, identity and confidence** without aggression. It gives brands presence by turning the architecture into the brand, not an envelope around it. Honest Materiality becomes a new form of premium, where rawness and refinement coexist and sincerity becomes the luxury language.

Function becomes Strategy.



DISTRICT VISION, SEOUL



THE CONVENI, TOKYO



DUOYUN BOOKSTORE, HUANGYAN

Behind the scenes, **efficiency becomes a design principle.** Fixtures replenish quickly. Navigation makes sense without instruction. Storage hides in plain reach. Materials withstand impact and time. These decisions reduce friction, accelerate staff movement and raise the customer's perception of ease.

Speed scales beyond the store. Deployment systems pre-engineer components, simplify logistics and shrink installation timelines. Clarity in packing, universal connection points and predictable layouts make global rollouts fast without compromising quality. Operational intelligence becomes a competitive advantage disguised as simplicity.

TRANSACTIONS

The purpose of physical retail has changed. People no longer enter stores to access product. They enter to access meaning. **Experience-first retail reorganises the hierarchy: experience leads and product supports.** Spaces become zones for tasting, testing, listening, configuring and discovering. They act as stages where the brand hosts and the product participates.

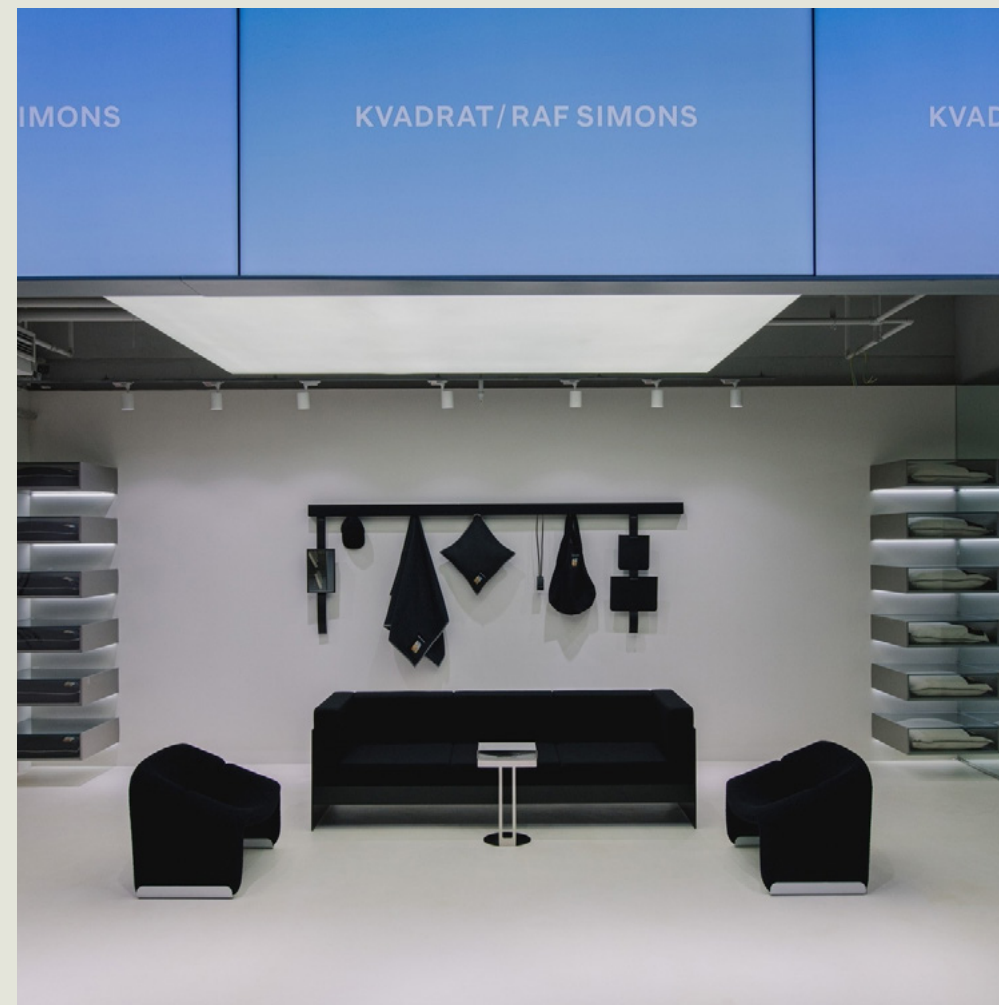
This doesn't dilute commerciality. It sharpens it. When the environment creates a pause, a ritual or a moment of involvement, the transaction feels more intentional. People leave with more than what they bought. They leave with a memory of how it felt. This is where physical differentiates itself from digital, turning presence into value.

AND

TRANSFORMATION



Show Intention



Through Precision.

Luxury shifts from accumulation toward precision. One gesture per wall. One material per zone. One light per object. The room becomes controlled, exact and quietly confident. Materials are soft but precise: matte stone, warm metals, low-sheen woods. Decoration is replaced by volume, proportion and well-directed light.

This form of minimalism is not cold. It is intentional. It reduces noise so that quality can speak clearly. Luxury becomes emotional through clarity, through **leaving space for the customer to breathe rather than overwhelming them with excess.** Confidence is visible in what the environment chooses to remove.



Where Culture Sets the Pace.

Not every brand thrives in calm. Curated Chaos brings energy, density and movement through layered merchandising, overlapping textures and dynamic storytelling. The room feels alive: stacks, clusters, asymmetry and collisions, but always orchestrated within an invisible grid that prevents the space from tipping into noise.

It fits fashion, youth culture and lifestyle brands where **expression is currency and static environments feel disconnected.** Curated Chaos creates the sense of entering a world mid-sentence, where discovery feels ongoing and the environment mirrors the rapid cultural tempo of the people who move through it.



ACNE STUDIOS, PROJECT STORE
TOKYO



NIKE LAB, CHICAGO

“Digital becomes spatial and emotional rather than visual and transactional.”

The next phase of digital retail integrates technology into the environment instead of layering screens onto walls. Light responds to movement. Sound adjusts to flow. Projection colours atmosphere instead of broadcasting content. Materials react to touch, temperature or presence.

Sensors coordinate ambience without drawing attention to themselves. Technology disappears, but the environment feels more alive. **Digital becomes spatial and emotional rather than visual and transactional.** It supports experience without interrupting it.

SCREENS

WITH THE

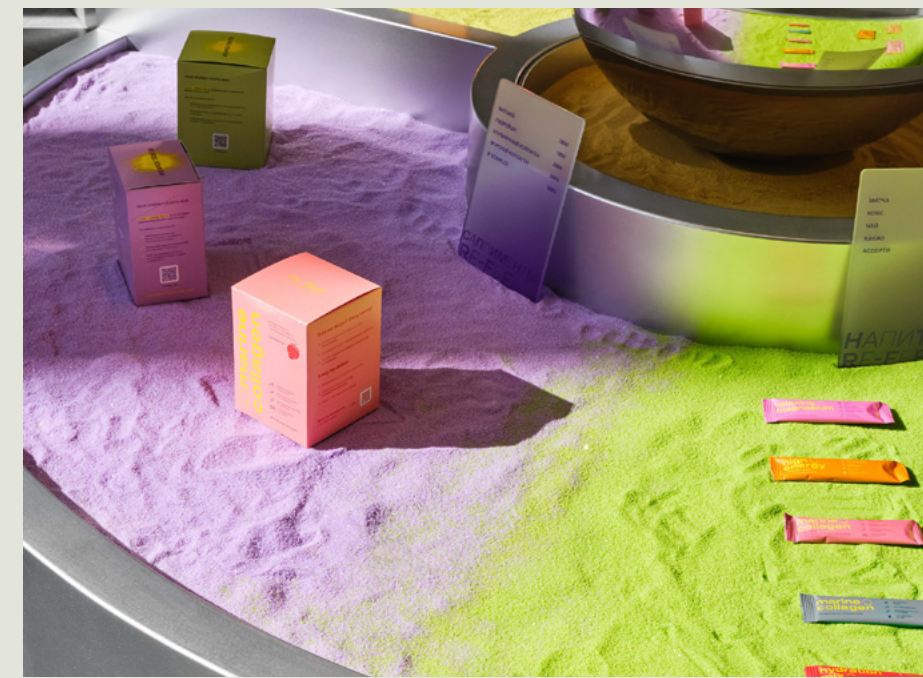


DESIGNS THAT ADAPT AS FAST AS YOU DO.



Retail tempo accelerates. Collections shift faster, campaigns overlap and global needs diverge. Static systems cannot keep up. Modular design introduces components that shift roles instantly. A table becomes a plinth, becomes a shelf, becomes a brand moment. Elements stack, fold, lock and travel.

Entire zones reconfigure overnight without tools. This is not just engineering. It is strategic freedom. Modularity allows brands to **evolve without constant rebuilds** and enables global consistency without suppressing local expression. It supports creativity, speed and operational efficiency in a single system.



Design the Touch.

Touch becomes a central part of communication. In an environment dominated by visual saturation, the physical store separates itself through texture, depth and material honesty. Deep grooves, pressed biomaterials, brushed stone, heavy linens and airy wools shift from background to content. People reach out because they need to confirm what is real, and stores respond by giving them surfaces that reward curiosity and slow them down.

Material transparency amplifies this. Instead of hiding recycled fragments, cloudy resins or irregular fibres, they are brought forward as visible proof of responsibility and origin. Sustainability becomes tactile rather than declarative. People don't just learn that something is responsible, they feel it. Sensory Materialism blends tactility and integrity into a design language that is emotional, memorable and instinctively trustworthy.





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One Space, Multiple Paths to Move.

The separation between online and offline disappears. People discover online, deepen the relationship in-store, convert anywhere and share everywhere. The store becomes a hub in this loop: a pick-up point, service centre, atelier, community room and experience layer in one. Journeys become personalised through micro-paths.

Quick in, quick out routes sit next to slow, exploratory flows. Configurator tables, guided edits, dynamic merchandising and flexible layouts adapt subtly to different needs. Everyone walks through the same store, but it feels **tailored to the way they shop.**



Acne Studios

Acne

Designers on Steroids.

AI transforms how stores come to life before anything is built. Teams can generate and compare **hundreds of layout options in minutes**, simulate flows, test sightlines, evaluate adjacencies and refine VM density at high speed. Performance data feeds back into concept development so the next iteration starts smarter than the last.

AI does not replace designers. It amplifies them. It removes blind spots, accelerates decision-making and makes creativity more intentional. It is not the face of the store. It is the intelligence behind it.

“AI does not replace designers. It amplifies them. It removes blind spots, accelerates decision-making and makes creativity more intentional.”



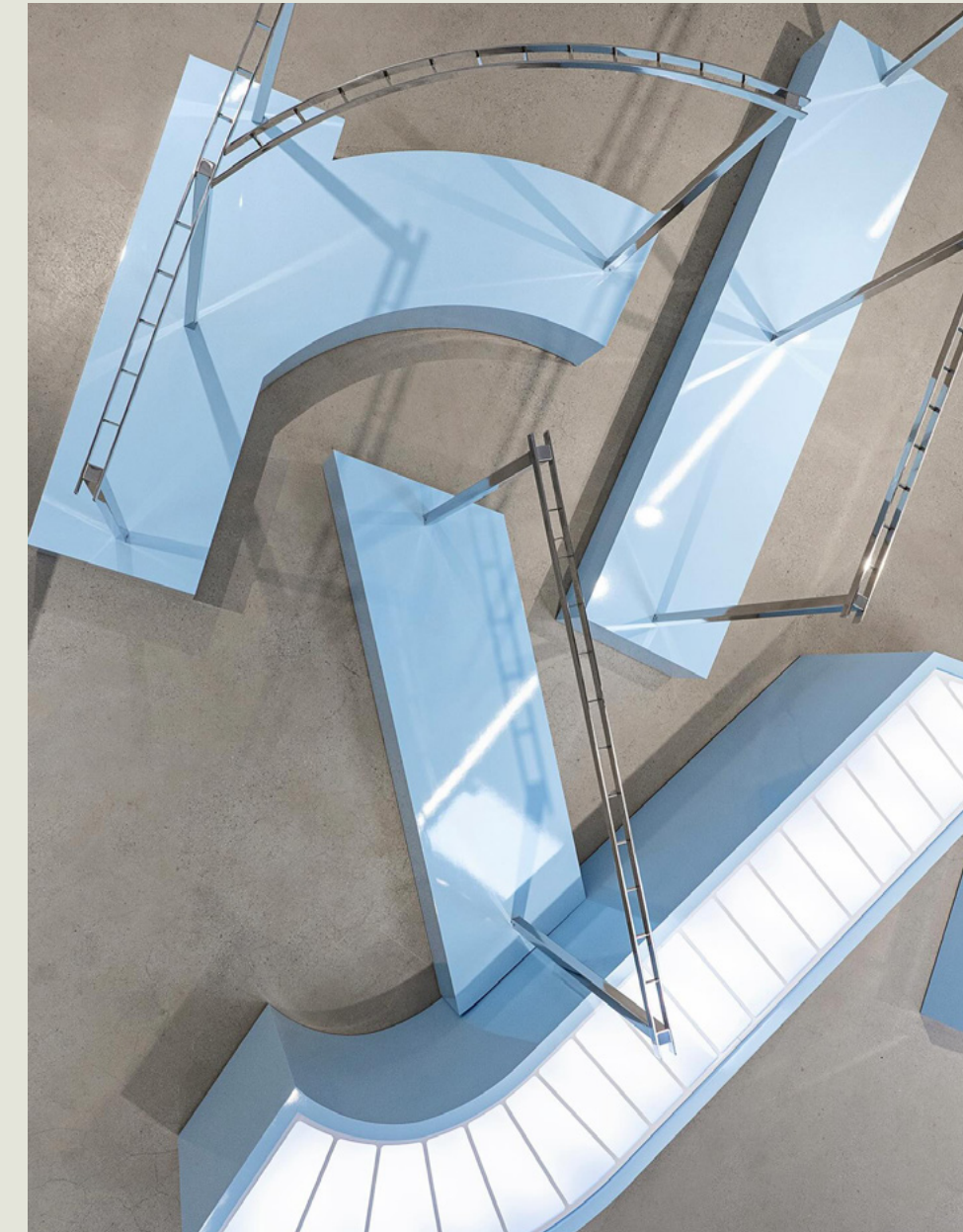
POST ARCHIVE FACTION,
DOVER STREET MARKET LONDON



ACNE STUDIOS STORE,
WEST HOLLYWOOD



OFF WHITE FLAGSHIP STORE,
MILAN



PLAINODDIY FOR CARLYN,
SEOUL

Why we share these insights.

We work where brands meet the physical world. We see shifts early: in materials, in manufacturing, in store rollouts, in behaviour on the floor. We see what works, what fails, and what quietly starts appearing everywhere.

Sharing these insights isn't marketing. It's part of the job. The better the industry understands the forces reshaping retail and spatial design, the better the environments we can build together, for brands, for teams, for the people who walk in.

‘IT’S NOT JUST
ABOUT WHAT WE
MAKE BUT
ABOUT WHAT
IT SPARKS.’

Build Different.
TCHAI.

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