

# **Global Retail Sourcing and Procurement Market Size study & Forecast, by Procurement Type (Direct Procurement, Indirect Procurement, Services Procurement), by Sourcing Method (Global Sourcing, Local Sourcing, E-sourcing, Sustainable Sourcing), by Industry Vertical (Apparel and Footwear, Grocery and Food Retail, Electronics, Furniture and Home Decor), by Supplier Relationship (Strategic Partnerships, Transactional Relationships, Collaborative Relationships) and Regional Forecasts 2025-2035**

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## **Abstracts**

The Global Retail Sourcing and Procurement Market was valued at approximately USD 2.99 billion in 2024 and is projected to expand at a CAGR of more than 3.94% during the forecast period 2025-2035. Retail sourcing and procurement encompasses the processes by which businesses strategically acquire goods, services, and partnerships to streamline operations, manage costs, and strengthen supply chains. Beyond securing raw materials or finished products, procurement has become a value-driven function, emphasizing sustainability, supplier collaboration, and digital integration. The market's growth trajectory is underpinned by the escalating complexity of global supply chains, rising consumer demand for product variety, and the increasing emphasis on sustainable sourcing practices. Retailers are rapidly transitioning toward digital procurement platforms and automated sourcing tools to unlock efficiency, enhance supplier visibility, and reduce operational risks.

The sharp increase in globalization, combined with the accelerated adoption of e-

commerce, has compelled retailers to rethink procurement strategies. Companies are now leveraging advanced analytics, AI-powered platforms, and digital supplier networks to extract greater value from procurement decisions while maintaining agility. According to UNCTAD, global e-commerce sales surpassed USD 5.8 trillion in 2022 and are expected to grow consistently, which directly drives demand for streamlined procurement ecosystems. Moreover, organizations are prioritizing resilient supplier relationships and sustainable sourcing methods to mitigate risks associated with geopolitical uncertainty, regulatory changes, and fluctuating consumer preferences. However, market expansion faces headwinds from compliance complexities, cyber risks in digital procurement, and the volatility of raw material pricing across global supply chains.

The detailed segments and sub-segments included in the report are:

By Procurement Type:

Direct Procurement

Indirect Procurement

Services Procurement

By Sourcing Method:

Global Sourcing

Local Sourcing

E-sourcing

Sustainable Sourcing

By Industry Vertical:

Apparel and Footwear

Grocery and Food Retail

Electronics

Furniture and Home Decor

By Supplier Relationship:

Strategic Partnerships

Transactional Relationships

Collaborative Relationships

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

Rest of Europe

## Asia Pacific

China

India

Japan

Australia

South Korea

Rest of Asia Pacific

## Latin America

Brazil

Mexico

## Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

## Direct Procurement is Expected to Dominate the Market

Direct procurement, which involves sourcing raw materials and goods directly tied to production and inventory replenishment, is anticipated to hold the largest share of the market. Retailers are increasingly adopting direct procurement strategies to gain better control over quality, ensure consistent supply, and maintain tighter cost efficiency. This

segment's dominance is bolstered by the rising demand for transparency in sourcing and the increasing consumer preference for traceable supply chains. On the other hand, services procurement is gaining gradual momentum as retail organizations increasingly outsource functions like IT, logistics, and customer service. While direct procurement anchors the market in terms of share, services procurement is carving a growing niche due to the outsourcing trend.

### Global Sourcing Currently Leads in Revenue Contribution

When considering sourcing methods, global sourcing continues to generate the majority of revenue. The reliance on global supply networks allows retailers to capitalize on cost advantages, access specialized expertise, and diversify their supplier base. Global sourcing is particularly critical in industries such as apparel, electronics, and grocery retail, where scale and diversity are vital. Yet, the landscape is evolving as sustainable sourcing gains traction, reflecting mounting regulatory pressure and growing consumer insistence on eco-conscious retail practices. E-sourcing, meanwhile, is emerging as a dynamic growth driver, enabling real-time supplier negotiations, compliance monitoring, and automated workflows. This indicates that while global sourcing holds the lion's share today, sustainable and e-sourcing methods are expected to expand rapidly in the coming years.

The key regions considered for the Global Retail Sourcing and Procurement Market include North America, Europe, Asia Pacific, Latin America, and the Middle East & Africa. North America currently dominates the market, attributed to its mature retail ecosystem, widespread adoption of advanced procurement technologies, and robust e-commerce penetration. Europe is also a strong contender, driven by stringent regulations around sustainability, corporate governance, and supplier accountability. However, Asia Pacific is poised to witness the fastest growth during the forecast period, primarily due to its booming retail sector, rapid industrialization, and digital transformation in procurement across countries like China and India. The rise of local sourcing initiatives, combined with government incentives for retail infrastructure development, is further accelerating the region's growth trajectory.

Major market players included in this report are:

SAP SE

Oracle Corporation

IBM Corporation

Coupa Software Incorporated

JAGGAER

Zycus Inc.

GEP Worldwide

Basware Corporation

Infor Inc.

Epicor Software Corporation

Proactis Holdings Plc.

Ivalua Inc.

SciQuest (now part of Jaggaer)

Corcentric Inc.

Determine (a Corcentric company)

## Global Retail Sourcing and Procurement Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period - 2025-2035

Report Coverage - Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope - North America; Europe; Asia Pacific; Latin America; Middle

## East & Africa

Customization Scope - Free report customization (equivalent to up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope\*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segments of the market are explained below:

### Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional-level analysis for each market segment.

Detailed analysis of the geographical landscape with country-level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of the competitive structure of the market.

Demand side and supply side analysis of the market.

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