Retail

What retail energy, facilities, and finance leaders are prioritizing, and where they're facing challenges, based on **EnergyCAP's comprehensive survey of nearly 200 organizations** and four decades of experience serving retailers and grocery chains.

Utility management in retail

Retail energy management operates across some of the most energy-intensive real estate in the country: stores open long hours, refrigeration running constantly, and HVAC systems serving high-traffic environments. Rising utility costs are compressing already-thin margins, and the organizations absorbing the biggest increases are looking for ways to bring financial discipline to a cost that keeps growing.

86% of gov organizations saw utility budgets increase in the past year

3 in 4 of gov respondents are not fully confident in their utility budget accuracy

48% gov organizations rely on a single person to handle every aspect of energy management

The retail paradox

Retail respondents are the most confident of any sector we surveyed - in their budgets, and in their ability to hit energy management goals. Yet they're absorbing some of the steepest utility cost increases we recorded, describe their energy management approach as reactive and manual, and retail's #1 blocker is lacking dedicated energy management resources—higher than any other segment. That confidence is an asset, but a clear understanding of the hurdles ahead is what will make it pay off. Rising costs, lean teams, and reactive processes are a challenging combination, and the retailers that close the gap will be the ones that match their ambition with the right data infrastructure.

50% describe their energy management approach as completely manual or only partially automated

72% eel confident in meeting their energy management goals

1 in 3 lack even a single dedicated energy management professional across their organization
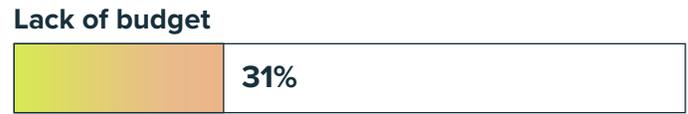
71% aren't planning to add new tools, but 29% want to add software in the next 12 months
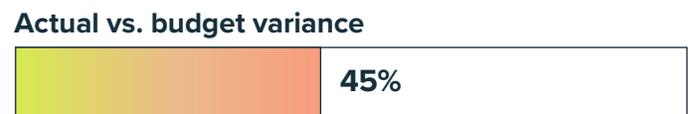
Top 2026 goals for retailers

1 **Control or reduce total utility spend**

59% of retail respondents

With nearly every retail organization surveyed seeing costs rise, spend control is the defining mandate of 2026-2027.

2 **Improve budget and forecast accuracy**

41% of retail respondents

Retail operates on tight margins and multi-location budgets. Accurate utility forecasting is a critical finance function, not just an energy function.

3 **Meet reporting and compliance requirements**

38% of retail respondents

A surprisingly high priority for retail, driven by sustainability commitments, ESG reporting obligations, and growing state-level requirements.

4 **Find and fix waste faster**

34% of retail respondents

With large, energy-intensive footprints across dozens or hundreds of locations, waste identification compounds quickly when left unaddressed.

5 **Improve comfort and reliability**

34%—vs 26% cross-industry

In grocery, temperature control mitigates regulatory risk and inventory loss. For retail, the connection between energy management and customer experience is uniquely direct: lighting, climate, and comfort are part of the product. No other sector we surveyed carries that dual obligation quite the same way.

Top government blockers to progress

Lack of time and staff

34%

Lack of budget

31%

Cross-team alignment

31%

How success is measured

Usage (kWh/therms/water)

59%

Actual vs. budget variance

45%

Total utility spend

38%

EUI/normalized intensity

31%

Bill accuracy and error rate

31%

Where retail and grocery energy management is heading in 2026

Retail energy teams manage some of the most geographically distributed and operationally complex utility portfolios in any sector: high-traffic stores, extended operating hours, and hundreds of locations both owned and rented. These are the trends shaping the priorities of retail energy leaders in 2026.

Energy is a top-line pressure on thin margins
Retail operates on some of the tightest margins of any commercial sector. When utility costs rise across a large store portfolio, the impact shows up quickly in store profitability, operating budgets, and portfolio performance.

Location and lease complexity
Retailers manage locations across different utilities, rates, landlords, and lease structures, making portfolio-wide visibility hard to maintain. Triple net leases add complexity by shifting utility responsibility to the tenant while often reducing transparency into billing details, cost drivers, or site-level anomalies.

Energy performance tied to operations
In retail, energy decisions affect more than the monthly bill. They can influence shopper comfort, refrigeration performance, equipment life, and day-to-day store operations. Energy management is increasingly viewed as part of operational stability, not just expense control.

Lean teams cover a lot of ground
For many retailers, energy oversight is one responsibility among many. That leaves little time to investigate spikes, validate bills, or drive consistent savings across sites. Energy management is heading toward simpler, faster workflows so small teams spend less time assembling data and more time using it.

Small issues have big waves
One billing error or one underperforming site may not seem urgent on its own. But repeated across hundreds of locations, those issues drain margin for months. Retail energy management is heading toward earlier identification of recurring problems, so teams reduce avoidable costs before they spread across the portfolio.

Reporting obligations are rising faster than expected
Retailers are being asked to provide more data for internal stakeholders, external benchmarks, and carbon reporting. Even when requirements vary by market or maturity level, the trend is more cross-functional reliance on utility data. Teams must support broader reporting needs and day-to-day realities.

The opportunity ahead

Three things EnergyCAP consistently sees that work for government energy teams, regardless of team size or tooling.

Act on budget variance faster
Budget variance is already a key KPI for retail teams. The gain comes when variances are reviewed early enough to investigate root causes.

Clarify control
In complex portfolios, especially triple net leases, progress starts with understanding which costs can be directly managed and which require landlord coordination.

Standardize how stores are evaluated
If you can't check every line item, see that rate schedules on your bills match what was negotiated; utilities misapply rates more often than you think.

How EnergyCAP helps

Designed for the pace and complexity of retail operations

Retail energy respondents are the most goal-confident of any sector we surveyed, and among the most resource-constrained. EnergyCAP is built for exactly that combination: we instantly surface the powerful insights of a large team, so yours can focus on what only they can do— make better decisions, drive more savings, and stay ahead of rising costs.

Retail runs on speed

Retail teams face rising utility costs, constant operational demands, and limited resources. EnergyCAP brings order to the complexity by centralizing utility bill, meter, and interval data and giving finance, facilities, and energy teams a shared view of cost and performance.

Purpose-built for finance

EnergyCAP gives finance teams a single source of truth for utility spend, backed by purpose-built workflows and controls designed for the complexity of utility billing. The result is stronger oversight, lower risk, and more confidence in budgeting, reporting, and financial review.

A clear view of costs and emissions

EnergyCAP connects utility and emissions data in one audited platform, making Scope 1, 2, and 3 reporting easier to manage while tying reporting back to the costs and usage driving it.

Meet your #1 goal: Control costs

Less than 1/3rd of retail respondents plan to add new energy management tools, but with some of the steepest utility cost increases of any sector we surveyed, the ROI case is hard to ignore. Most EnergyCAP customers see 10% year-over-year bill savings.

What this looks like in practice

A **major North American bulk food retailer** used EnergyCAP to shorten utility bill processing from 7–8 days to 1–2 days across 230+ vendor accounts. With no changes to internal workflows, the team gained faster visibility, more automation, and a process built to scale.

Read their success story →