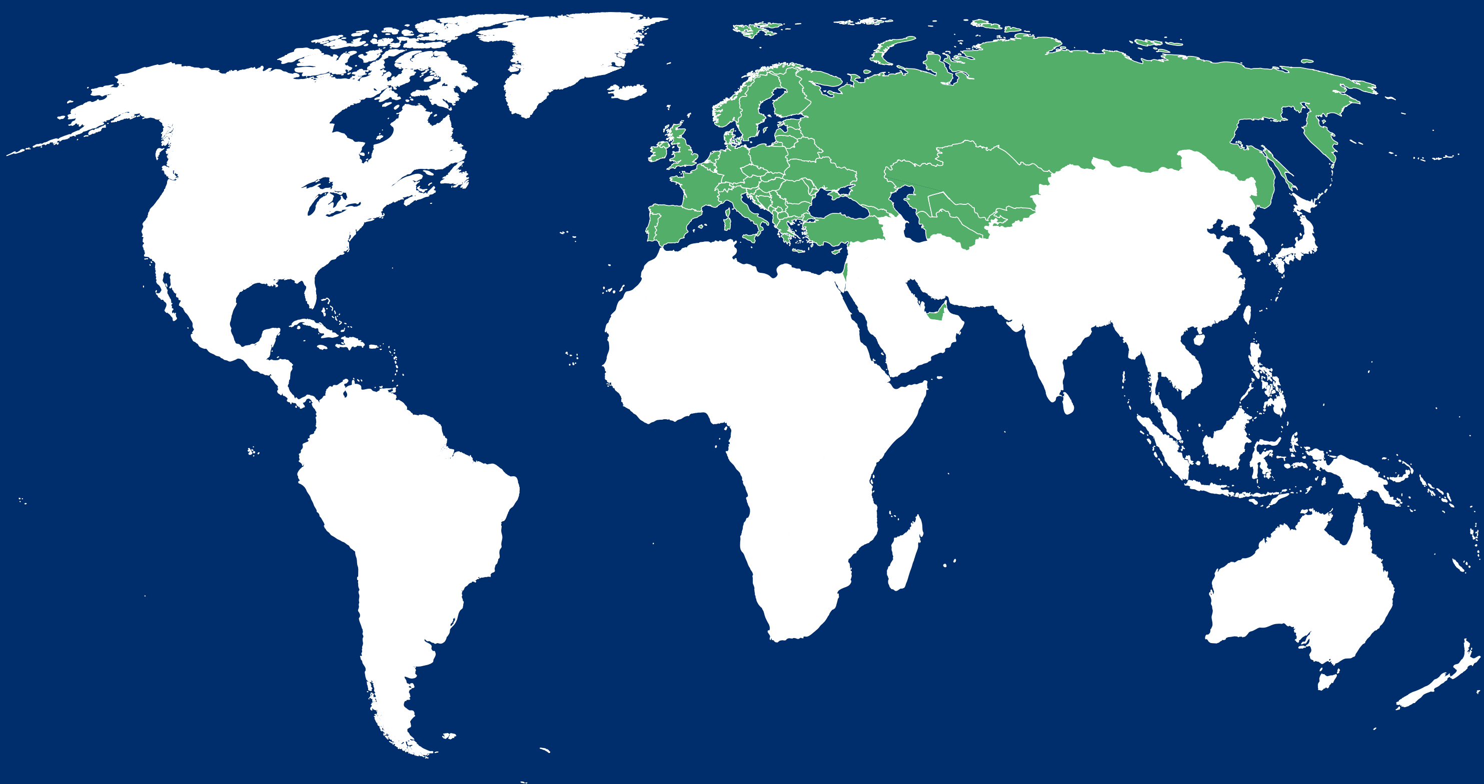
in Europe

MOs

Member Companies

Employees

Financial Strength



GS1 in Europe Scorecard 2024

Every market
tells a story.

Market data
is the language.

Know your data
and **you will understand your market.**

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1. Introduction

Business Intelligence (BI) refers to the methods and tools that transform raw data into meaningful insights, helping organisations make better strategic, tactical, and operational decisions.

In this spirit, GS1 in Europe launched its first survey in 2017 to collect consistent and comparable data from our 49 Member Organisations (MOs). Since then, this annual initiative has allowed us to gather key information about both GS1 in Europe as a region and each MO's structure and performance.

The survey covers areas such as:

- The total number of member companies in Europe;
- Member companies' distribution by sectors and business types;
- The total number of employees in Europe;
- Financial indicators, including membership fees and the contribution of value-added services.

By collecting and analysing this data every year, GS1 in Europe ensures continuous monitoring of key indicators that describe the environment, priorities, strategies, strengths, and challenges of our MOs.
This ongoing effort helps us better understand the evolution of our member companies ecosystem and supports data-driven decision-making across the GS1 in Europe community.

2. 2024 edition (2023 data)

2.1 Introduction

In this document, we present the **2024 edition of the GS1 in Europe Scorecard**, based on 2023 data, which updates the narrative to reflect the latest data and charts included in the report.

Overall, **2023 demonstrated continued resilience** across the European region: the number of member companies grew, financial stability remained strong, and the share of value-added services continued to rise. At the same time, **investment in people** helped sustain high-quality service and support the expansion of GS1's core **FMCG footprint**, while opening new opportunities in emerging sectors.

The insights presented here are designed to help **MOs** better understand their local market dynamics and identify key areas for focus, from **micro and small businesses** and **core FMCG** to **high-potential adjacent sectors and channels.**

Building on six years of consistent data collection and analysis, the **2023 results begin with a strong positive signal:** membership continues to grow across the region. This reinforces GS1's ongoing relevance and the trust placed in our system by companies of all sizes, sectors, and markets.

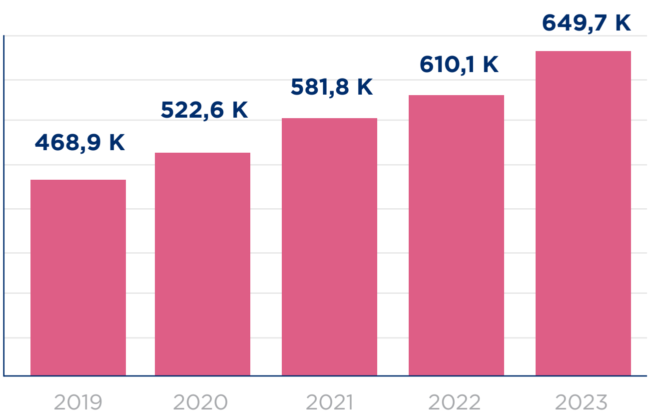
2.2 Why working with "old data"?

All data and analyses included in this report are fully compliant with GS1 in Europe's competition law risk assessment. The figures presented are aggregated and anonymised, based on data older than one year collected from the 49 GS1 MOs, and are strictly confidential.

2.2.1 MEMBER COMPANIES

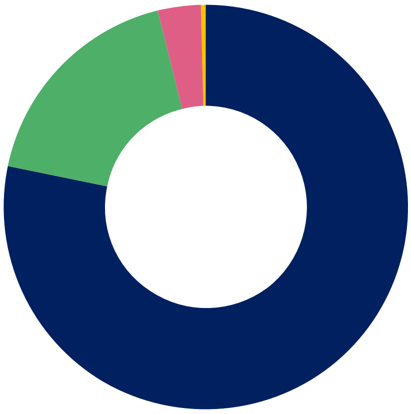
Membership continued to grow in 2023. The updated chart indicates another year of net additions.

Membership continued to grow in 2023. The updated chart indicates another year of net additions (+39,656 member companies), consistent with the post-pandemic expansion. Compared to 2022, the **2023 growth rate remains positive** and broadly aligned with the medium-term trend seen since 2019.



Trend %	Value Size
+6.5% 2023 vs 2022	**+39,656** members 2023 vs 2022
+38.5% 5Ys (2023 vs 2019)	**+180,820** 5Ys (2023 vs 2019)

Figure 1: Number of member companies 2019–2023 and trend (%)

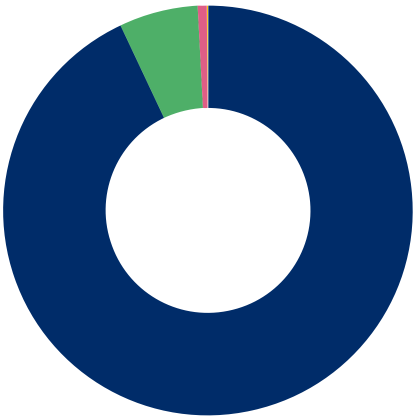


Total member companies	Share%
0-2 M€ (MICRO)	78,2 %
2-50 M€ (SMALL_MEDIUM)	17,9 %
50-500 M€	3,4 %
>500 M€	0,4 %

Figure 2: Member companies' classification by turnover size

Micro enterprises remain the backbone of our community. The 2023 distribution confirms that companies below €2M in annual turnover account for the clear majority (78.2%), **with a substantial share under €500k (64%).**

This composition underscores GS1's role as an enabling platform for smaller businesses that continue to digitise their processes.



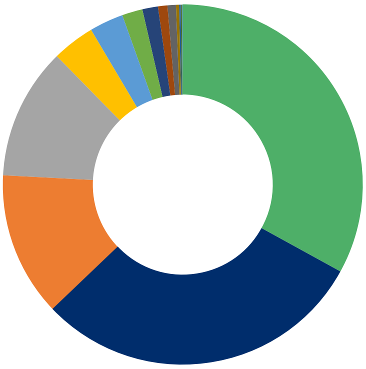
Total member companies	Share%
0-2 M€ (MICRO)	93,0 %
2-50 M€ (SMALL_MEDIUM)	6,3 %
50-500 M€	0,7 %
>500 M€	0,1 %

Figure 3: Share of the 'new' incoming member companies by turnover size (2023)

Among new joiners in 2023, **micro companies dominate once again (93%).** This pattern highlights where prospecting and onboarding journeys should remain focused, on simple, value-driven messages (identification, barcodes, data quality, listings) and streamlined activation flows tailored to micro and small businesses.

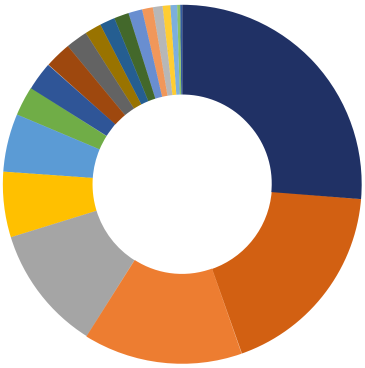
According to the Common European classification implemented by GS1 in Europe*, Manufacturers continue to represent the largest share, followed by retailers/wholesalers and primary producers. Healthcare, technical industries and solution providers maintain a meaningful presence. The 2023 mix confirms the centrality of FMCG while signalling room for growth in sectors with rising digital adoption and regulatory requirements.

* 39 MOs (89%) adopted the Common European Classification to segment their member companies by Business Type.
Business Type refers to the kind of economic activity an organisation performs, how it uses resources to produce goods or services for customers in exchange for money or other value (e.g., manufacturers, retailers, etc.).



Business type	Share%
Manufacturer	29,9 %
Retailer (Marketplace)	13,0 %
Wholesaler	11,8 %
Raw material supplier/producer	3,8 %
Technical industries (Construction, Defence, Automotive)	3,1 %
Healthcare provider (e.g. Hospitals)	1,8 %
Solution providers	1,4 %
Transport & Logistic service provider	0,8 %
Accomodation & Logistic service provider	0,8 %
Bank & Finance	0,3 %
Education	0,1 %
State body/Agency	0,1 %
Association	0,1 %
Others	33,0 %

Figure 4: Member companies classified by Business Type



Sectors	Share%
Food	26,3 %
Wearing apparel & footwear & leather	14,3 %
Beverage	11,3 %
Fresh food	5,9 %
Personal care and house cleaning products	5,2 %
Building materials (clay, cement, plaster, metal) and products	2,7 %
Textile	2,6 %
Pharmaceutical/parapharmaceutical products	2,4 %
Chemical products	2,0 %
Furniture	1,5 %
Medical/optical and electromedical equipment	1,4 %
Electrical equipment	1,3 %
Packaging (metal, plastic, wood)	1,2 %
Games & toys	1,0 %
Other buildings manufacturers	0,9 %
Consumer electronics	0,7 %
Sports goods	0,6 %
Tobacco	0,3 %
Repair and installation of machinery and equipment	0,2 %
Others	18,3 %

Figure 5: Share (%) of Manufacturers by sector

Segmenting Manufacturers by Sector, FMCG remains the core sector**, but 2023 charts show **gradual broadening into apparel/footwear, healthcare, textiles and furniture.** These segments benefit from standardised identification and data sharing, confirming how GS1 standards can support the modernisation of all supply chains.

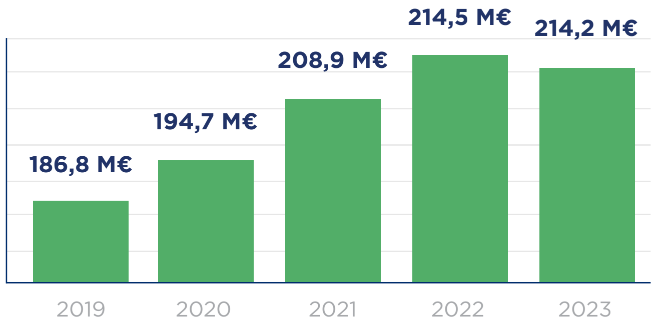
The steady expansion of GS1 membership continues to be one of the key drivers of financial stability across the region.

This growing base of member companies provides a solid foundation for MOs to invest in new services, partnerships, and innovation.
The 2023 financial results reflect this resilience and diversification, highlighting a network that remains both stable and forward-looking.

2.2.2 FINANCIAL STRENGTH

Financial performance remains a core indicator of the network's stability and long-term sustainability. Tracking these results helps assess how Member Organisations continue to balance growth, diversification, and investment in new services.

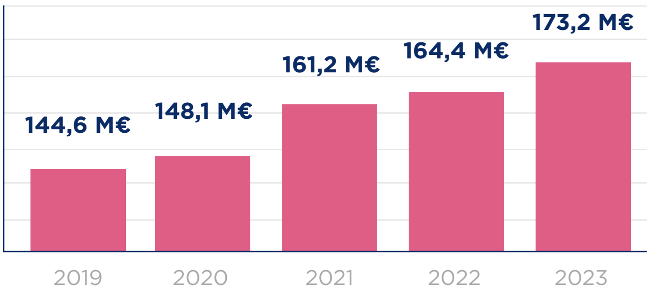
**Sector is a segment of the economy that includes companies providing the same type of products or services.



Trend %	Value Size
-0.2% 2023 vs 2022	**-374 K€** 2023 vs 2022
+14.7% 5Ys (2023 vs 2019)	**+27,4 M€** 5Ys (2023 vs 2019)

Figure 6: Financial strength over the last 5 years (million euro)

Financial strength is stable in 2023. The multi-year trend points to steady growth since 2019, with a consolidation in 2023. **Two pillars** sustain this performance: continuous membership expansion and a rising contribution from value-added services (VAS). However, recent adjustments to the business model have limited the full realization of this growth potential.



Trend %	Value Size
-5.4% 2023 vs 2022	**+8,8 M€** 2023 vs 2022
+19.8% 5Ys (2023 vs 2019)	**+28,6 M€** 5Ys (2023 vs 2019)

Figure 7: Financial strength obtained through membership fee in the last 5 years

Membership fee revenue remains the foundation. 2023 shows a solid advance versus 2022, consistent with the member base expansion. Pricing stability and disciplined renewals kept the fee line on a predictable upward track.

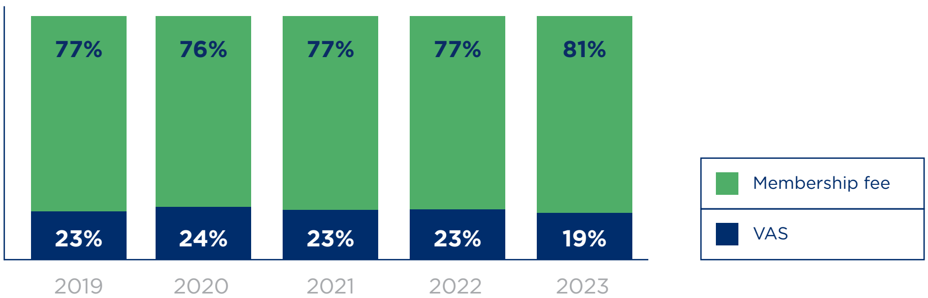
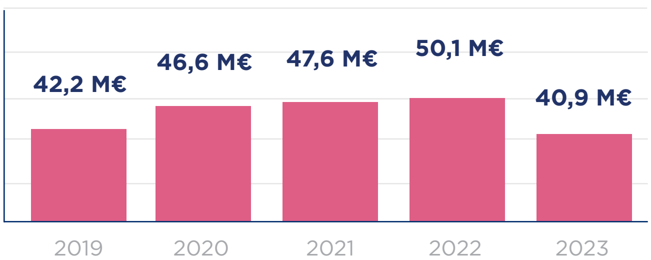


Figure 8: Membership fee and value-added service revenue

Value-added services lost share in 2023 (19%) following the change in business model, particularly in one specific MO. Datapools, consulting and training remain the leading VAS families.



Trend %	Value Size
-18.4% 2023 vs 2022	**-9,2 M€** 2023 vs 2022
-2.9% 5Ys (2023 vs 2019)	**-1,2 M€** 5Ys (2023 vs 2019)

Figure 9: Value-added services revenue value

Value-added services lost revenue with a negative trend in 2023 (-18.4%).

Up	67 %	**+14.5%** 2023 vs 2022
Down	33 %	**-48.8%** 2023 vs 2022

Figure 10: Value-added services revenue value — up and down

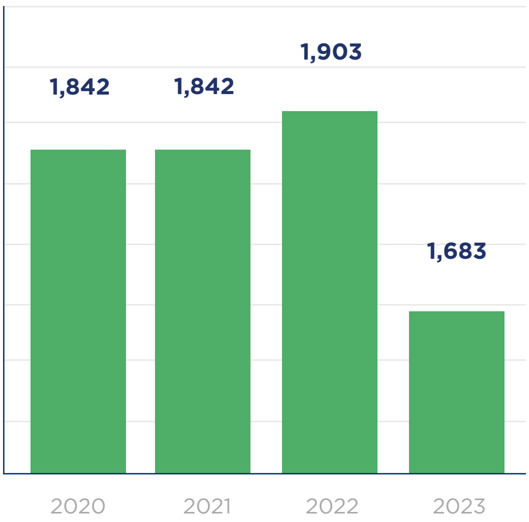
Value-added services performance is not uniform across MOs. A majority group (21 MOs which represent 67% of the total VAS revenue) posted robust year-on-year growth, while a smaller set faced declines, often linked to business model changes or timing effects.

Behind these strong financial results lies a continued **commitment to people.**
MOs are investing strategically in talent, ensuring that teams have the skills, capacity, and motivation to deliver high-quality services and respond to evolving business needs.

These investments are also enabling MOs to strengthen their customer engagement and expand into new, value-creating areas.

2.2.3 EMPLOYEES

People remain at the core of GS1's ability to deliver value and sustain growth. Monitoring workforce trends provides insight into how MOs are investing in talent to meet increasing service demands and support the evolution of their business models.



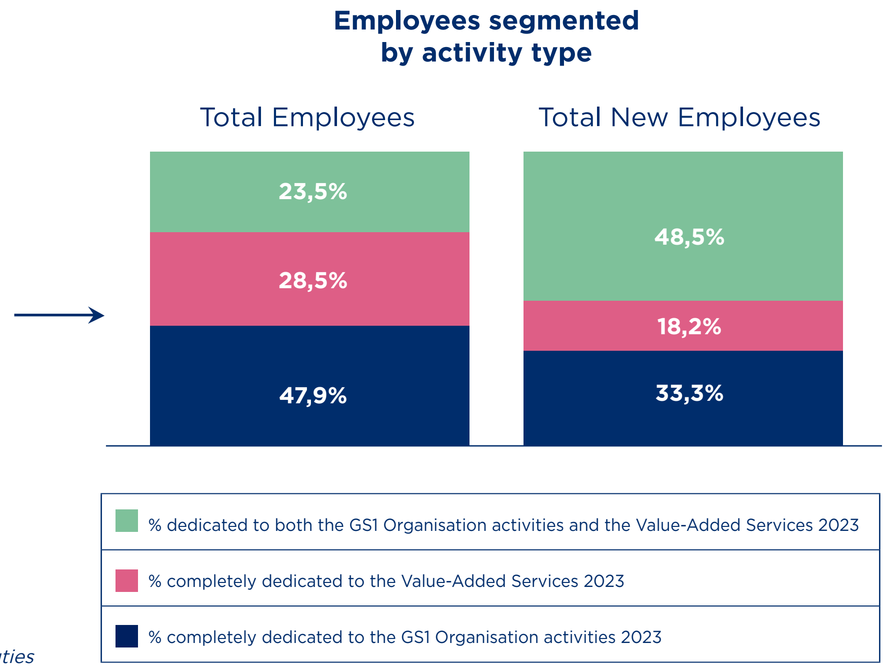


Figure 10: Total number of employees and new hires by duties

2023 marks another year of disciplined investment in people. Also, here we can see the effect of a different business model in one MO as a reason why the trend of the number of employees is negative (220 people less). Otherwise, in general, considering the newly hired employees, headcount increased in line with both membership and service demand, with a notable allocation to VAS delivery and customer success roles.

Together, these trends - steady membership growth, solid financial foundations, and continued investment in people - paint a picture of a **resilient, connected, and forward-looking GS1 community.**

2.2.4 TARGET AUDIENCE: PROFILING OUR MEMBER COMPANIES

The five-year trend highlights the structural contribution of micro and small businesses. Birth rates for digital-native and marketplace-enabled SMEs during the pandemic cohorts continue into 2023.
Synthesis for 2023:

- Micro companies account for the majority of the base and of new joiners.
- SMEs engaged in online sales remain an important inflow.
- Marketplaces and start-ups expand the addressable audience for GS1 services.

2.2.5 CONCLUSION

The **2023 results reaffirm the strength, adaptability, and shared purpose of GS1's Member Companies and the broader GS1 community in Europe.** Despite a fast-changing environment, the network continued to grow, expanding membership, maintaining financial stability, and investing in people to sustain quality and innovation.

These results confirm that GS1's foundations are strong: membership fee revenues advanced steadily, value-added services gained further momentum, and human capital remained a cornerstone of success. While FMCG remains the core of GS1's activity, new opportunities are emerging in adjacent sectors, driven by digital transformation, sustainability, and evolving European regulation.

Looking ahead, GS1 in Europe will continue to focus on empowering **micro and small businesses**, strengthening engagement with **medium and large enterprises**, scaling **value-added service best practices**, and expanding into new sectors where data sharing and standards create measurable value.

These priorities will ensure GS1 in Europe remains a trusted, **data-driven, and future-ready community**, advancing our shared **Vision 2030** of interoperability, trust, and innovation.

Next Steps

In 2026, GS1 in Europe will continue refining its data collection and benchmarking tools to deepen insights for MOs. The Scorecard will remain an essential resource for monitoring progress, fostering collaboration, and guiding strategic decision-making in alignment with **Vision 2030.**

If you would like to receive your **MO Scorecard** together with the **European consolidated data**, allowing you to compare your local results with the overall European trends, please contact us.

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