# CPG Innovation Summit: Analytics, Activations, & Agents - Using Data to Survive & Thrive in a 3-Shelf Reality

SPINS®

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Co-located with Fresh Ideas ORGANIC MARKETPLACE

Product Discovery Powered by Beacon DISCOVERY™ BY NEW HOPE NETWORK

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By Informa Markets

Information Classification: General

# Analytics, Activations, and Agents

Using data to survive and thrive in a 3-shelf reality

CPG Innovation Summit
Expo West | March 3, 2026

# The Disruption

The Opportunity

**01**
Familiar
Ground

**02**
Catalysts
of Change

**03**
Impact
& Implications

**04**
Critical
Success Factors

# Our Presenters

## Hannah Law

SVP
Strategic Growth
& Engagement



## Rachel Tipograph

CEO
MikMak



## Jessie Wright

SVP
SPINS Foundry



## Amish Puri

SVP
SMB Sales

**Polling Question 1:**

**How comfortable are you leveraging real-time data, marketing analytics, and emerging AI/agentic technologies to guide brand or retail decisions?**

- Very comfortable — we're actively using these capabilities today

- Somewhat comfortable — we're experimenting but not yet scaled

- Curious but unsure — we understand the concepts but haven't applied them

- Not comfortable — we lack familiarity or tools in these areas

- Here to learn — I want to understand what these topics mean for my business

**Polling Question 2:**

**How did your investments in 2025 in the following areas change over the previous year**

- Distribution and retail relationships (e.g. promotion, trade spend)

- Traditional Media

- Non-traditional media (e.g. social media, ecommerce)

- Market/consumer research

- Data & technology

- 3rd party/vendors

- R&D/product innovation

- Artificial intelligence

# The Disruption
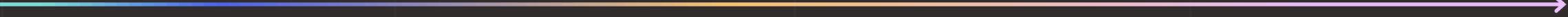
The Opportunity
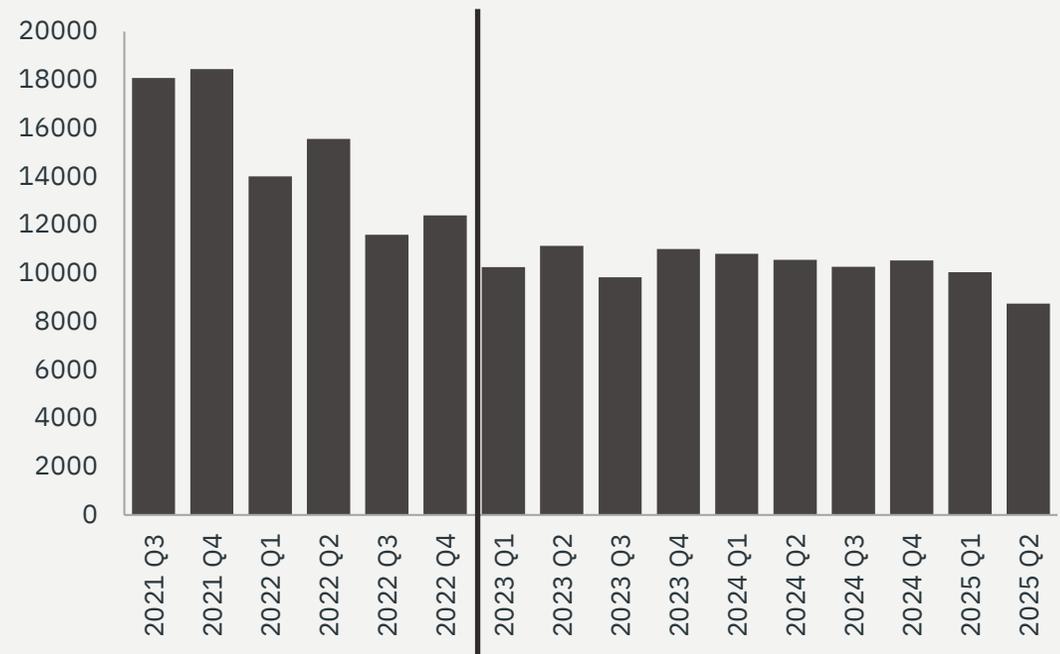
## 01
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Catalysts
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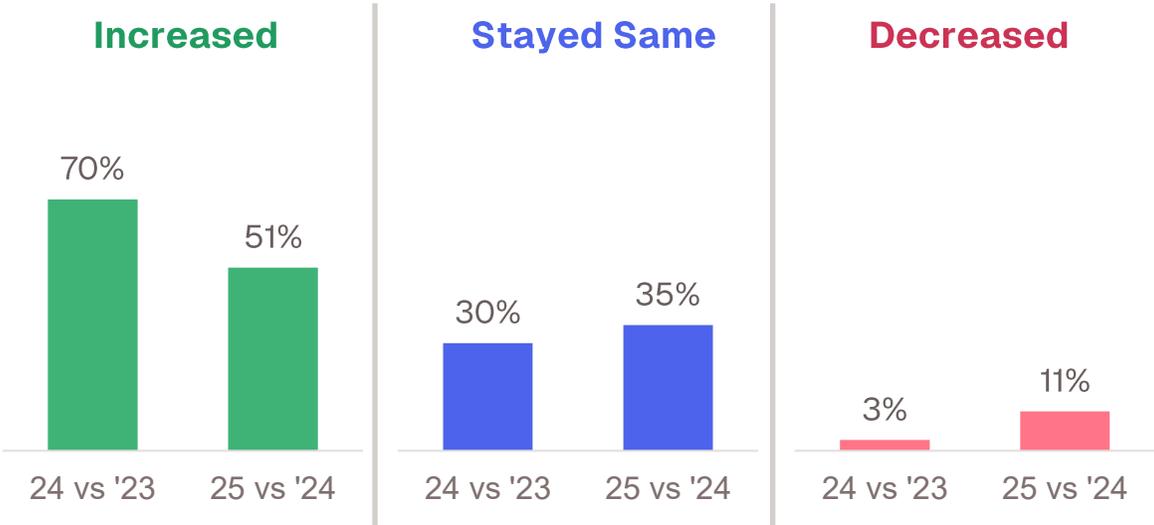Impact
& Implications

## 04
Critical
Success Factors

# The pace of **new item launches** has declined, but innovation remains top of mind for most executives

## Number of items launched by quarter



A high growth year in 2024 created cautious, but still positive, investment in R&D and innovation in 2025



| Increased | Stayed Same | Decreased |

*Q: How did your innovation/R&D investment change YoY?*

# Brands of all sizes can have successful launches, but use different strategies for success

## Innovation Success Rate by Brand Size^

■ Extend Existing Category    ■ Grow in New Category

| Brand Size | Extend Existing Category | Grow in New Category |
|---|---|---|
| New Brand | 61% | 61% |
| Emerging… | 60% | 61% |
| Scaling Brand… | 58% | 57% |
| Extending Brand… | 59% | 64% |
| Large Brand… | 55% | 67% |
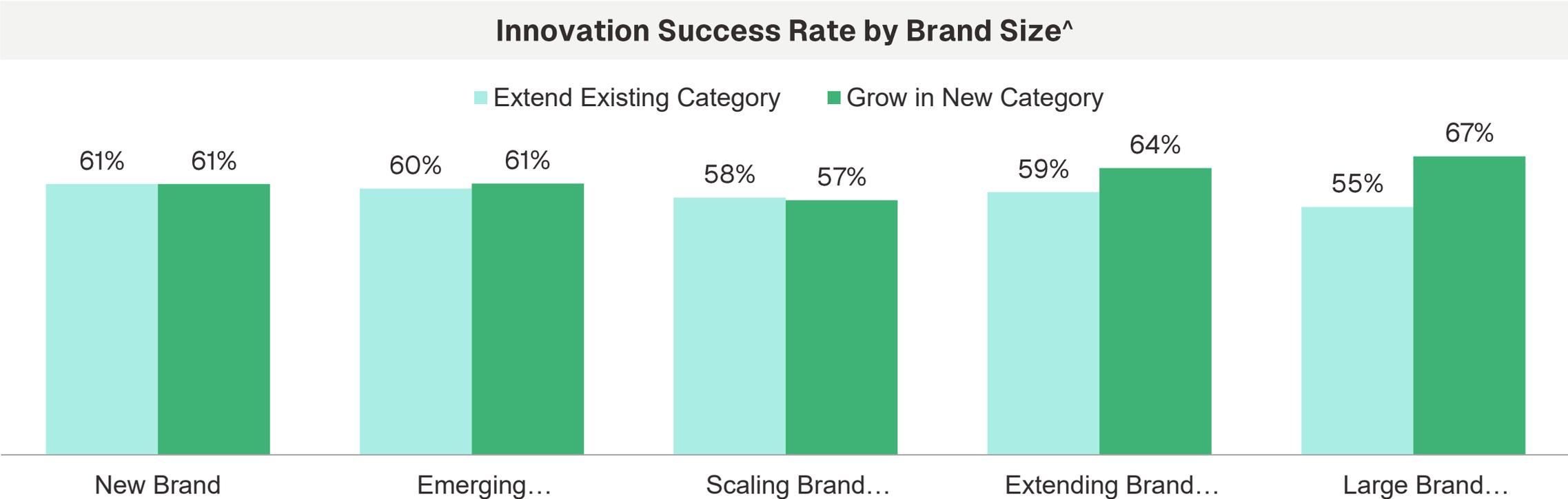
# Innovation Archetypes

## Core Expansion
Widen the offerings, but stay "close to home"

## Sideway Stretch
Expand into new pockets within your core segment

## Attribute Adjacency
Leverage brand ethos in adjacent segments where it is also driving growth

## Category Capture
Introduce brand's right-to-win into far-away areas of opportunity

# Successful innovation is often the catalyst for high valuation

## PATHWAY 1: PORTFOLIO DEPTH

Brands that drive growth through new UPCs

Share of sales from new UPCs (launched in L2Y)

 **24%**

 **15%**

## PATHWAY 2: CATEGORY EXPANSION

Brands that have stretched into new categories

Share of sales from outside original category (v 2YA)

 **88%** (+5pts)

 **86%** (+12pts)

 **27%** (+4pts)

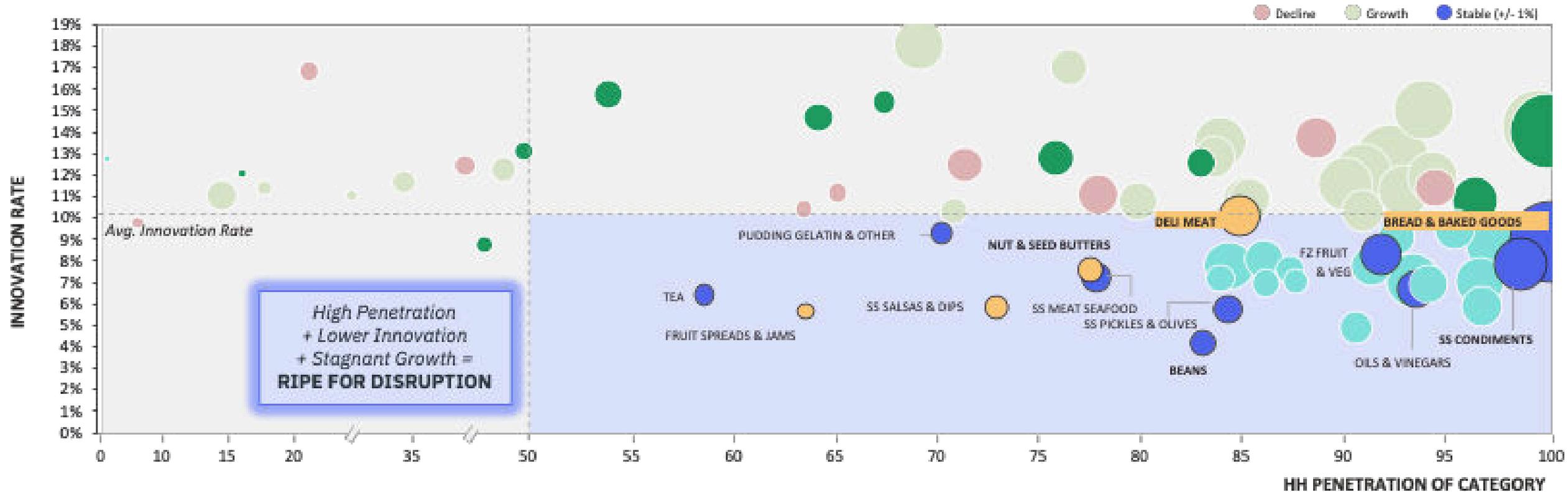 **41%** (+21pts)

# Calculating Disruption

Strong shopper presence + low growth + minimal innovation

# The Disruption
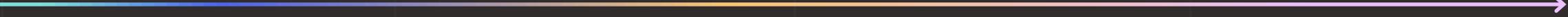
The Opportunity

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# A new set of realities have emerged for CPG leaders

A seismic shift in the tradition of how, why, and where people shop for food.

**57%** of Americans reported following a specific diet or eating pattern in the past year

**73%** of consumers use multiple channels during their shopping journey

**~9 in 10** retailers are adopting or piloting AI

## Preference-based consumption
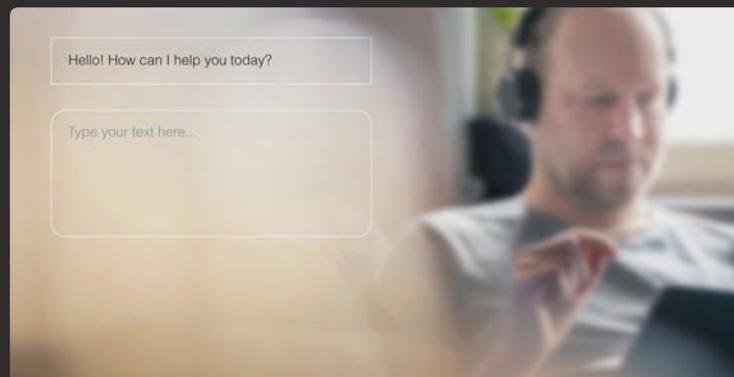


## Non-human participation



Hello! How can I help you today?

Type your text here...

## Anywhere commerce

# A **values-driven approach** to health, sustainability, and transparency

## Preference-based consumption

Non-human participation

Anywhere commerce



**>90%** of US shoppers seek to buy values-oriented products: good for people, planet and animals[1]

**90%** of Gen Z and Millennials are actively looking to avoid using or consuming certain ingredients[3]

**63%** of 2025 CPG unit growth across channels driven by Naturally Positioned products alone

# A **values-driven approach** to health, sustainability, and transparency

**》》**

# Decoding data to resonate and unlock opportunity

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**SPINS 2026 EXECUTIVE PULSE SURVEY**

## 1 in 5
Believe that changing consumer preferences will be the MOST disruptive force in 2026

## 86%
Increased or maintained investment in R&D and innovation in 2025

Health and wellness drive innovation investment

| | | | | |
|---|---|---|---|---|
| 30% | 16% | 14% | 14% | 8% |
| Health and Wellness Positioning | Category Disruption | New Categories | Idea Prioritization | Flavor/variatal extentions |
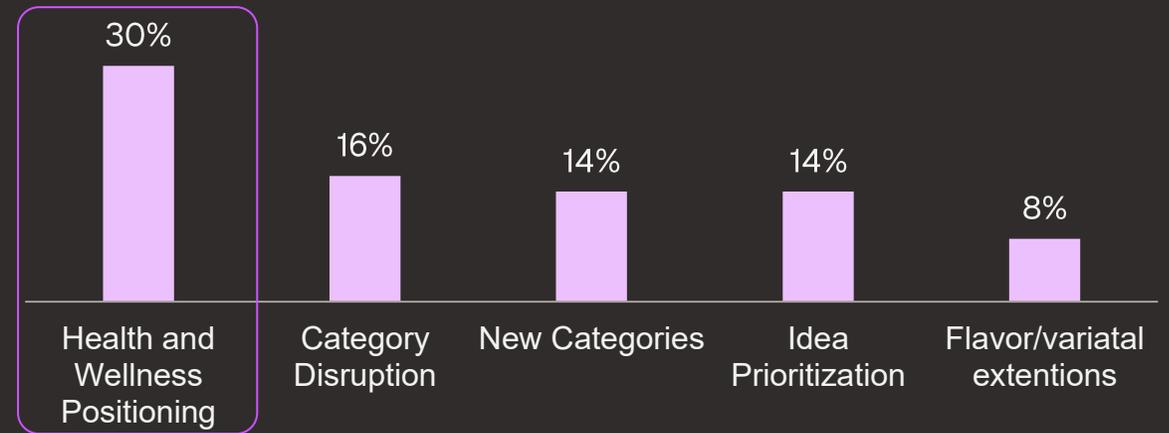
*Q: What is the top focus of your innovation strategy?*

**Polling Question 3:**

**Please indicate your agreement with the following statements**

- We have a clear definition of "agentic shopping" within our organization.

- We are actively exploring tools (AI assistants, personalization engines) to support agentic shopping

- Our products are optimized for discoverability in algorithm-driven environments.

- We are adapting our messaging for consumers who bypass traditional advertising

# The growing influence of **AI, automation, and synthetic agents**
in shaping consumer decisions and product development

**Preference-based consumption**

**Non-human participation**

**Anywhere commerce**



Hello! How can I help you today?

Type your text here...
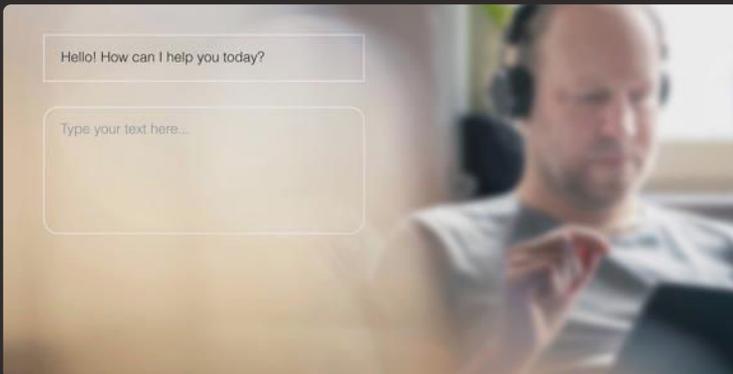
**75%** of consumers say they're open to a trusted AI personal shopper that understands their needs[1]

**~9 in 10** retailers are adopting or piloting AI[2]

**68%** of retailers want gen-AI to transform marketing/content[3]

*1:*Accenture Consumer Pulse Research 2025; 2 & 3:  NVIDIA State of AI in Retail and CPG - 2025

# Agentic shopping moves mainstream

MikMak customers have seen a more than 30x rise in ChatGPT referral traffic since January 2025

**Share of ChatGPT Traffic Over Time | 2025**
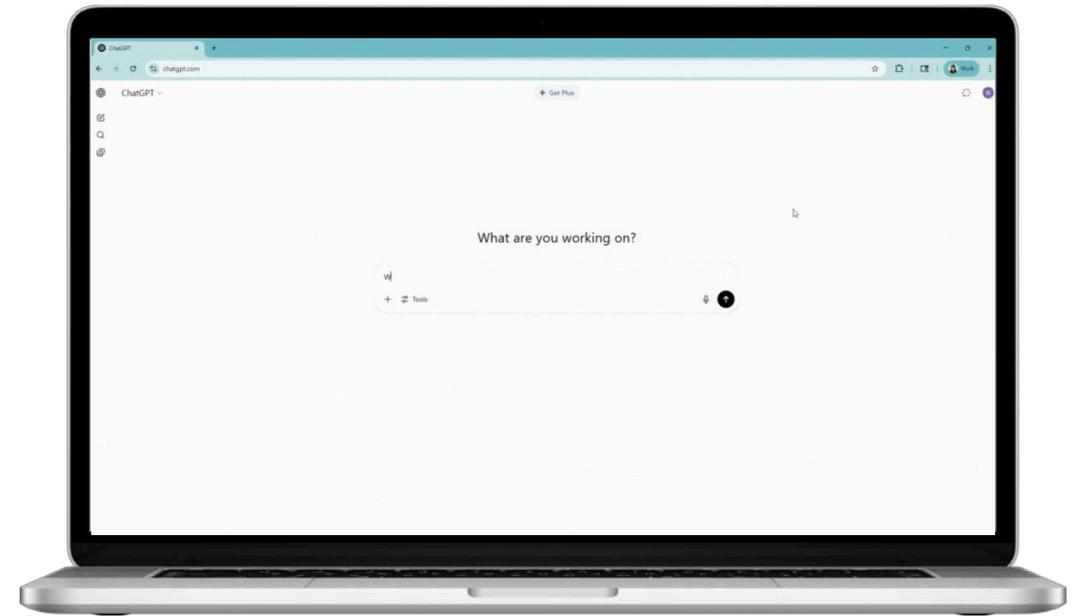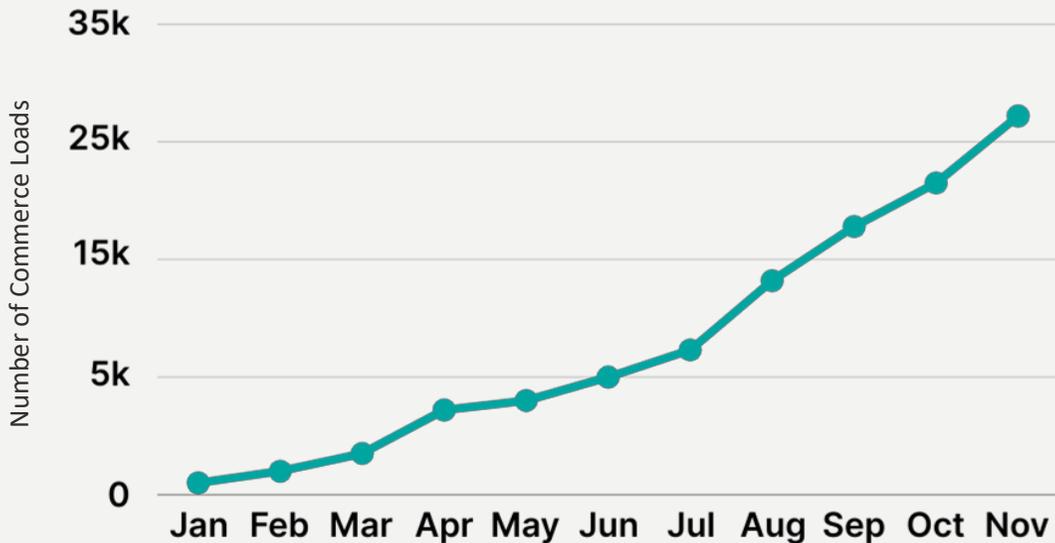
# A tension between disruption, and preparedness

A surprising gap between those who are certain of impending disruption, and general confidence in being ready

## SPINS 2026 Executive Pulse Survey



Agentic commerce — 11% / 46%
Private label growth — 46% / 54%
Consumer preferences & knowledge — 65% / 56%
Non-traditional sales & marketing — 51% / 57%
New market entrants — 70% / 61%

■ Confident/Very Confident  ■ Disruptive/Very Disruptive

## A state of exploration and experimentation

**62%** → **31%**

We are **actively exploring** tools to support agentic shopping

Our products are **not optimized for discoverability** in algorithm-driven environments

**62%** → **50%**

We are **adapting our messaging** for consumers who bypass traditional ads

Do **not have a clear definition** of "agentic shopping within the organization
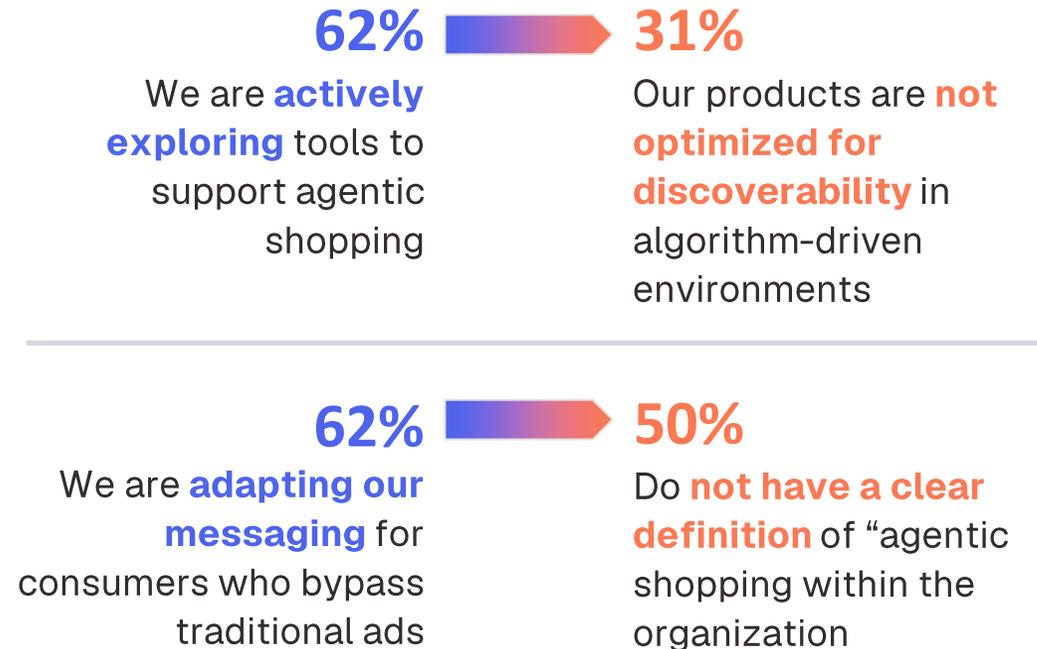
**Polling Question 4:**

**What channels/tactics are most important when it comes to finding, engaging, and retaining customers?**

- Distribution and retail relationships (e.g. promotion, trade spend)

- Traditional Media / Out of Home

- Non-traditional media (e.g. social media, ecommerce)

- Search

# The rise of frictionless, omnichannel, and ambient shopping experiences

**Preference-based consumption**

**Non-human participation**

**Anywhere commerce**



**15%** of total retail was eCommerce in Q2 2025 (+5.3% YoY)[1]

**$100B** Social commerce market by 2026[2]

**$67.3B** Retail media ad spend forecasted for 2025[3]

# The rise of frictionless, omnichannel, and ambient shopping experiences

》 **Engage with shoppers** wherever they are

**SPINS 2026 EXECUTIVE PULSE SURVEY**

*Q: How well are you able to track consumer engagement activities?*

**68%**
Increased spend in non-traditional media (e.g. social, e-commerce)



Chart data:

**Social Media:** Extremely Well 8%, Well 33%, Somewhat well 39%, Not well 19%

**Influencer campaigns:** Extremely Well 5%, Well 11%, Somewhat well 41%, Not well 43%

**Shoppable Media (landing pages):** Extremely Well 11%, Well 30%, Somewhat well 32%, Not well 27%

**Omnichannel marketing campaigns:** Extremely Well 3%, Well 24%, Somewhat well 49%, Not well 24%

**Traditional in-store activation:** Extremely Well 11%, Well 30%, Somewhat well 41%, Not well 19%

Legend: ■ Extremely Well  ■ Well  ■ Somewhat well  ■ Not well

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# What's next:
## Opportunities to prioritize in 2026

**1. Audit innovation**

Most companies are exploring ways to better match their portfolio with health and wellness trends.

⌄⌄

**Ensure your upcoming launches align with consumer needs.**

**2. Leverage AI for growth**

Most companies feel they don't have a clear path to take advantage of AI, beyond internal efficiencies.

⌄⌄

**Prioritize discoverability; Set clear goals and concrete steps**

**3. Scrutinize & optimize media**

Most companies are shifting the mix of media spend across channels, not just repeating last year's plan.

⌄⌄

**Invest in agility and adjust spend based on measurable impact.**

APPENDIX

# The Third Shelf

Where products compete for AI recommendations

## Physical Shelf

1950s–Present

Products compete for eye-level placement, endcaps, and in-store visibility. Brands invest in packaging design, trade spend, and retailer relationships.

**HOW YOU WIN**

**Shelf placement, packaging, trade promotions, in-store merchandising**

## Digital Shelf

2000s–Present

Products compete for search rankings, PDP quality, and retail media impressions. Brands invest in SEO, content, images, reviews, and paid placements

**HOW YOU WIN**

**Search optimization, rich media, retail media spend, ratings & reviews**

## Third Shelf

EMERGING

Products compete for AI agent recommendations. Agents don't browse — they query structured data and recommend what they can confidently interpret.

**HOW YOU WIN**

**Semantically enriched structured data aligned to consumer intent signals**

# The Data Gap

From marketing copy to agent-readable truth

## BEFORE: Raw Text

**Typical Brand** PDP

*Awesome BrandX Protein Minis help support kids' immune health, muscle and bone health, and energy metabolism. Made in the USA, no color added, no artificial flavors, gluten free.*

**ISSUES**

✕ **Protein source** — not specified in structured fields

✕ **High-protein classification** — agent must infer from text

✕ **Target audience (kids)** — buried in prose, hard to index

✕ **Occasion (lunchbox, snack)** — no data provided

✕ **Health benefits** — in text but not tagged for retrieval

✕ **Clean label status** — not explicitly declared

✕ **No JSON-LD / Schema.org markup**

## AFTER: Structured Data

**Foundry-Enriched** PDP

```
Nutritional
proteinPerServing:  "10g"
proteinSource:  "whey"
highProtein:  true
calories:  "90/svg"

Dietary & Claims
glutenFree:  true
cleanLabelScore:  "9/10"
artificialColors:  "none"
artificialFlavors:  "none"

Audience & Occasion
audience:  ["kids 4-12", "picky eaters"]
occasion:  ["school lunchbox", "after-school snack"]

Health Benefits
functionalBenefits:  [
"immune support",
"muscle health",
"bone health",
"energy metabolism"
]
```

# Tomorrow's Brands will be Built Real-Time

|  | | | |
|---|---|---|---|
| **Pre Social Media Era** pre 2007 | **Social Media Era** 2007-19 | **Commerce Media Era** 2020-24 | **AI Commerce Marketing Era come 2025** |

Brands were built top-down

Brands were built using social product-consideration data first

Brands are being built using commerce data first

Brands will be built on top of real-time commerce intelligence - that spans media and retailer channels, psychographic, demographic, context, first party data, LLMs - and agentic orchestration that inspires people to take action faster than ever before

**GAP**

**Glossier.**

**Good & Gather**

**MikMak**

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Monolithic Commerce Era

Self-Serve Commerce Era

Commerce Data as a Service Era

Composable Commerce (API, AI) Era

**Magento**

**Shopify**

**/LiveRamp**

**MikMak**

**MikMak**

# Innovation Archetypes

**Core Expansion**     Sideway Stretch     Attribute Adjacency     Category Capture

Widen the offerings, but stay "close to home"

**What to look for:**
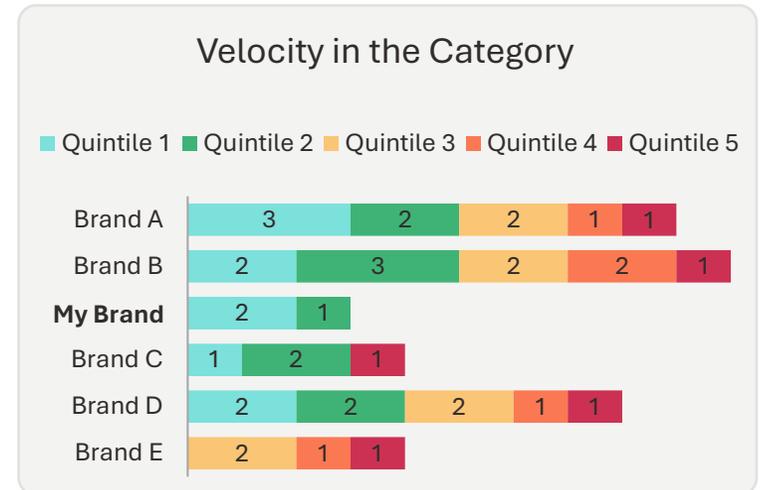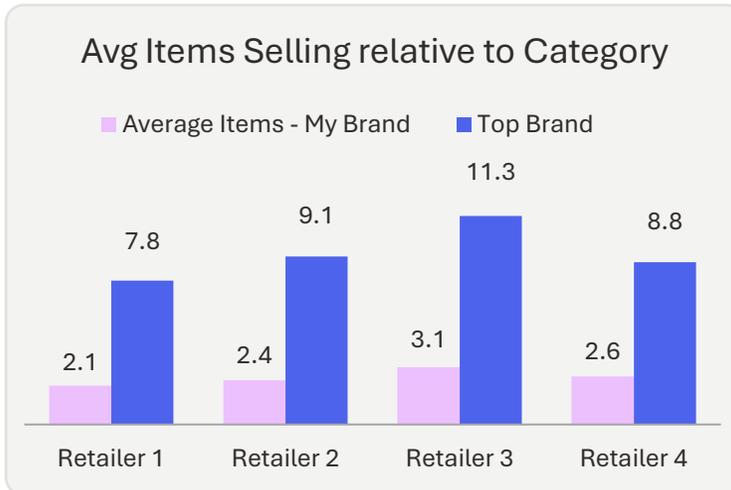
## Avg Items Selling relative to Category

■ Average Items - My Brand     ■ Top Brand

| Retailer | Average Items - My Brand | Top Brand |
|----------|--------------------------|-----------|
| Retailer 1 | 2.1 | 7.8 |
| Retailer 2 | 2.4 | 9.1 |
| Retailer 3 | 3.1 | 11.3 |
| Retailer 4 | 2.6 | 8.8 |

## Velocity in the Category

■ Quintile 1  ■ Quintile 2  ■ Quintile 3  ■ Quintile 4  ■ Quintile 5

| Brand | Quintile 1 | Quintile 2 | Quintile 3 | Quintile 4 | Quintile 5 |
|-------|-----------|-----------|-----------|-----------|-----------|
| Brand A | 3 | 2 | 2 | 1 | 1 |
| Brand B | 2 | 3 | 2 | 2 | 1 |
| **My Brand** | 2 | 1 | | | |
| Brand C | 1 | 2 | | 1 | |
| Brand D | 2 | 2 | 2 | 1 | 1 |
| Brand E | | | 2 | 1 | 1 |

# Innovation Archetypes

Expand into new pockets within your core segment

**What to look for:**
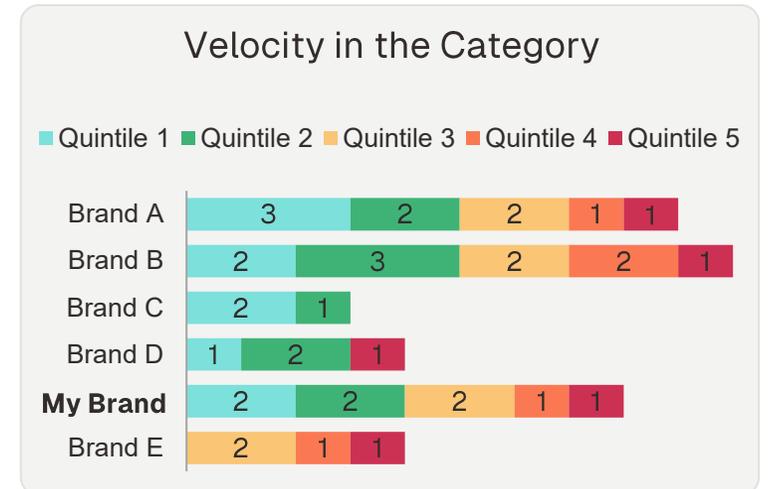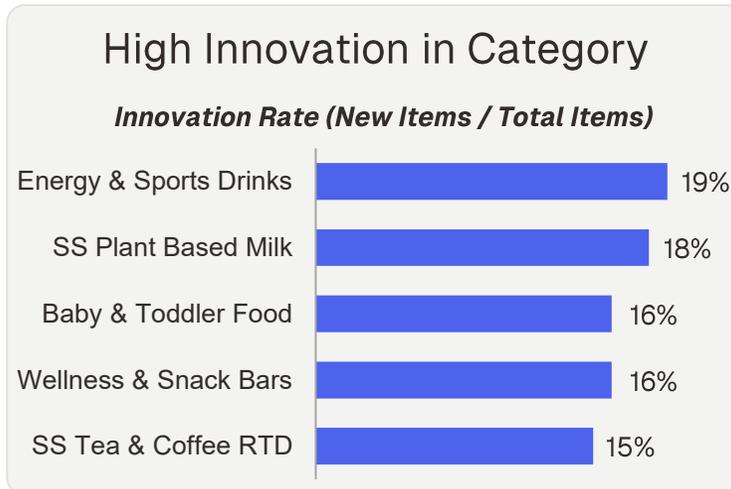
## High Innovation in Category

*Innovation Rate (New Items / Total Items)*

| Category | Rate |
|---|---|
| Energy & Sports Drinks | 19% |
| SS Plant Based Milk | 18% |
| Baby & Toddler Food | 16% |
| Wellness & Snack Bars | 16% |
| SS Tea & Coffee RTD | 15% |

## Velocity in the Category

■ Quintile 1 ■ Quintile 2 ■ Quintile 3 ■ Quintile 4 ■ Quintile 5

| | Quintile 1 | Quintile 2 | Quintile 3 | Quintile 4 | Quintile 5 |
|---|---|---|---|---|---|
| Brand A | 3 | 2 | 2 | 1 | 1 |
| Brand B | 2 | 3 | 2 | 2 | 1 |
| Brand C | 2 | 1 | | | |
| Brand D | 1 | 2 | | | 1 |
| **My Brand** | 2 | 2 | 2 | 1 | 1 |
| Brand E | | | 2 | 1 | 1 |

# Innovation Archetypes

Core Expansion          Sideway Stretch          **Attribute Adjacency**          Category Capture

Leverage brand ethos in adjacent segments where it is also driving growth

**What to look for:**

## High brand awareness

■ Purchased    ■ Considered    ■ Aware

| Brand | Purchased | Considered | Aware | Total |
|---|---|---|---|---|
| **My Brand** | 25 | 10 | 40 | 75 |
| Brand B | 21 | 15 | 30 | 66 |
| Brand C | 23 | 12 | 29 | 64 |

## Nascent share + growth in adjacent categories of core competency

| Category | Labeled Grain Free | |
|---|---|---|
| | $ Sales | $ % Chg. vs. YA |
| SS Chips & Pretzels & Snacks | $276 M | +24% |
| SS Cold Cereals | $241 M | +48% |
| SS Crackers & Crispbreads | $135 M | +27% |

# Innovation Archetypes

**Core Expansion**　　　**Sideway Stretch**　　　**Attribute Adjacency**　　　**Category Capture**

Introduce brand's right-to-win into far-away areas of opportunity

**What to look for:**

## Struggling category

*Total Soda – Mulo+Conv – % Chg 2024 v 2023*

■ Units　■ EQ Vol

-2.9%

-3.5%

Soda

## Opportunity to be first mover

*Probiotic soda – Cat $ Share – Mulo + Conv*

7%

0%

w.e. 1/9/22　　　w.e. 5/18/25