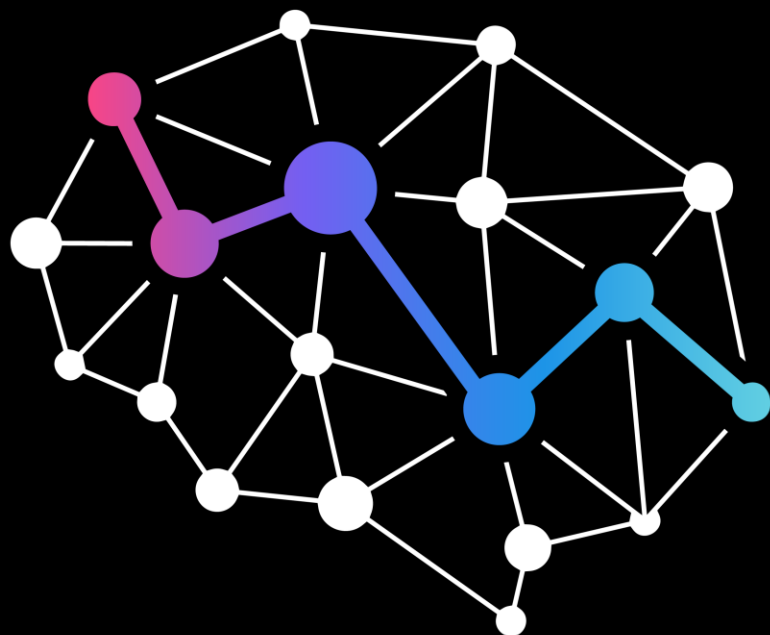




WINNING STRATEGIES FOR THE DIGITAL SHELF

PRESENTED BY
Gregor Murray
Chief 'So What' Officer, DCG

POWERED BY
SEECTM

GROCERYSHOP

MANDALAY BAY, LAS VEGAS

OCTOBER 1st, 2025

COMMUNITY >150 GLOBAL BRAND MANUFACTURERS

>50 MARKETS

18 CATEGORIES



**Globally trusted, independent source of
Digital Commerce capability intelligence**

Enabling the best-informed Digital Commerce capability
decisions, unlocking digital and digitally-influenced growth
through actionable intelligence



DIAGEO



Unilever

**Mondelēz
International**

MARS

DANONE

Kellanova

L'ORÉAL

Barilla
DAL 1877

essity

Henkel

COLGATE-PALMOLIVE

MOST ADMIRED BRANDS IN DIGITAL COMMERCE



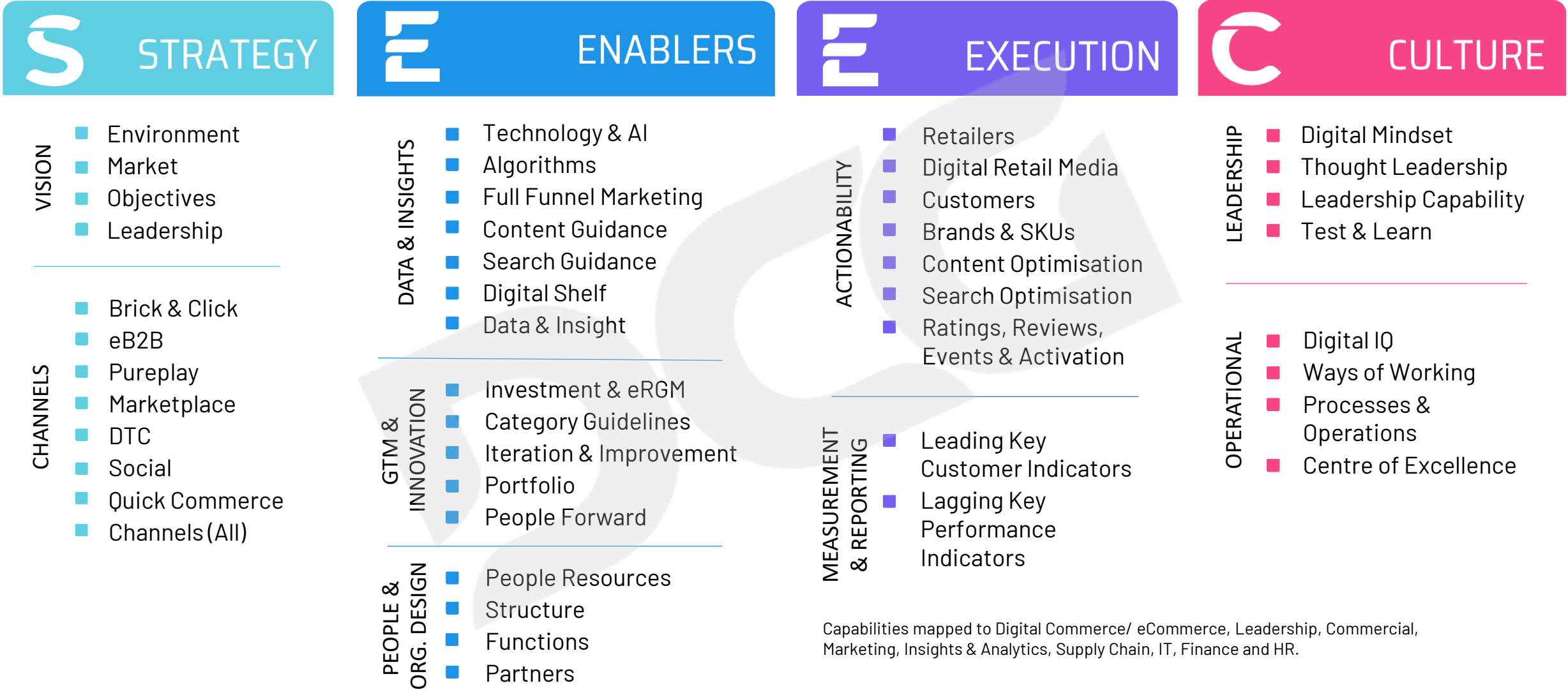
COMPILED ANNUALLY FROM THE VOTES OF ALL DCG BENCHMARK PARTICIPANTS

+4k	Votes in 2024
183	Unique Manufacturers Referenced
5	Geographies Covered

FULL REPORT ON THE MOST ADMIRED BRANDS GLOBALLY & BY REGION







Capabilities mapped to Digital Commerce/ eCommerce, Leadership, Commercial, Marketing, Insights & Analytics, Supply Chain, IT, Finance and HR.

AMAZON

eB2B

DRM

DIGITAL RETAIL MEDIA

DSC

DIGITAL COMMERCE SUPPLY CHAIN

TECH STACK

TECH STACK

DSO

DIGITAL SHELF OPTIMISATION

SEEC
ALWAYS-ON



S

STRATEGY

VISION

- Environment
- Market
- Objectives
- Leadership

CHANNELS

- Brick & Click
- B2B
- Pureplay
- DTC
- Social
- Quick Commerce

E

ENABLERS

DATA & INSIGHTS

- Technology & AI
- Algorithms
- Full Funnel Marketing
- Content Guidance
- Search Guidance
- Digital Shelf
- Data & Insight

GTM & INNOVATION

- Investment & eRGM
- Category Guidelines
- Iteration & Improvement
- Portfolio
- People Forward

PEOPLE & ORG. DESIGN

- People
- Structure
- Functions
- Partners

M

EXECUTION

ACTIONABILITY

- Retailers
- Digital Retail Media
- Customers
- Brands & SKUs
- Content Optimisation
- Search Optimisation
- Ratings, Reviews, Events & Activation

MEASURE & REPORTING

- Leading Key Customer Indicators
- Lagging Key Performance Indicators

C

CULTURE

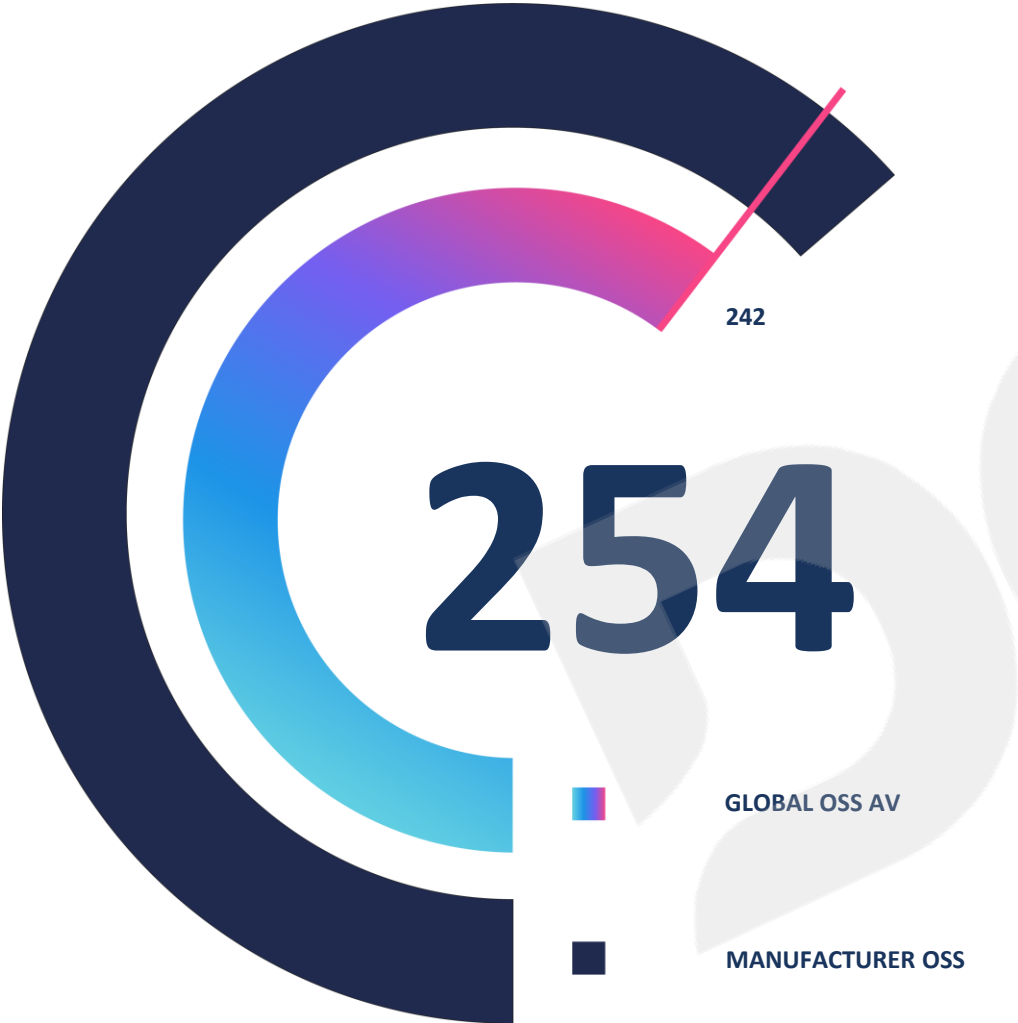
LEADERSHIP

- Digital Mindset
- Thought Leadership
- Leadership Capability
- Test & Learn

OPERATIONAL

- Digital IQ
- Ways of Working
- Operational Capability
- Centre of Excellence

ONE SEEC SCORE ('OSS')



GLOBAL 'ALL
MANUFACTURER'
OSS AV.

242

+12



NORTH AMERICA
'ALL MANUFACTURER'
OSS AV.

246

+8



USA
'ALL MANUFACTURER'
OSS AV.

249

+5



PACKAGED FOODS
'ALL MANUFACTURER'
OSS AV.

235

+19

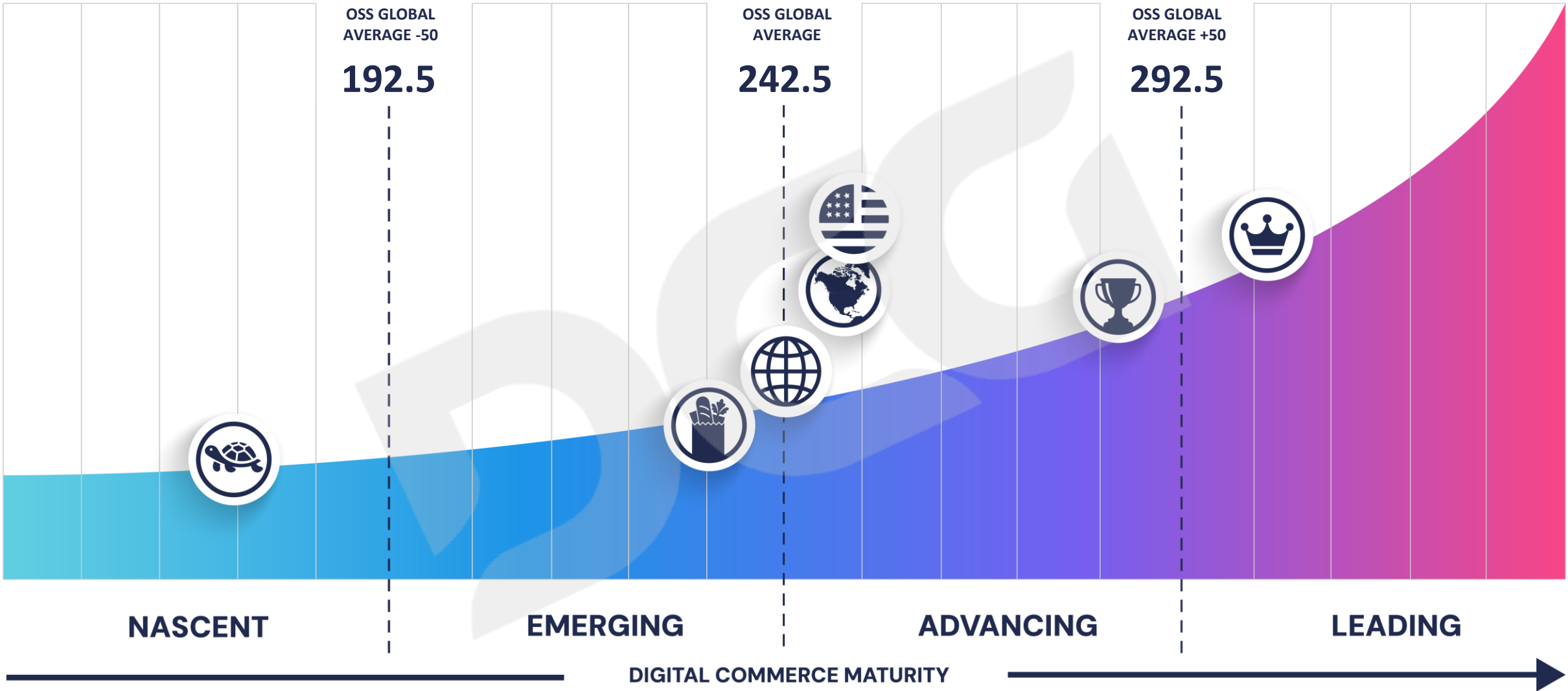


GLOBAL 'LEADING 10
MANUFACTURERS'
OSS AV.

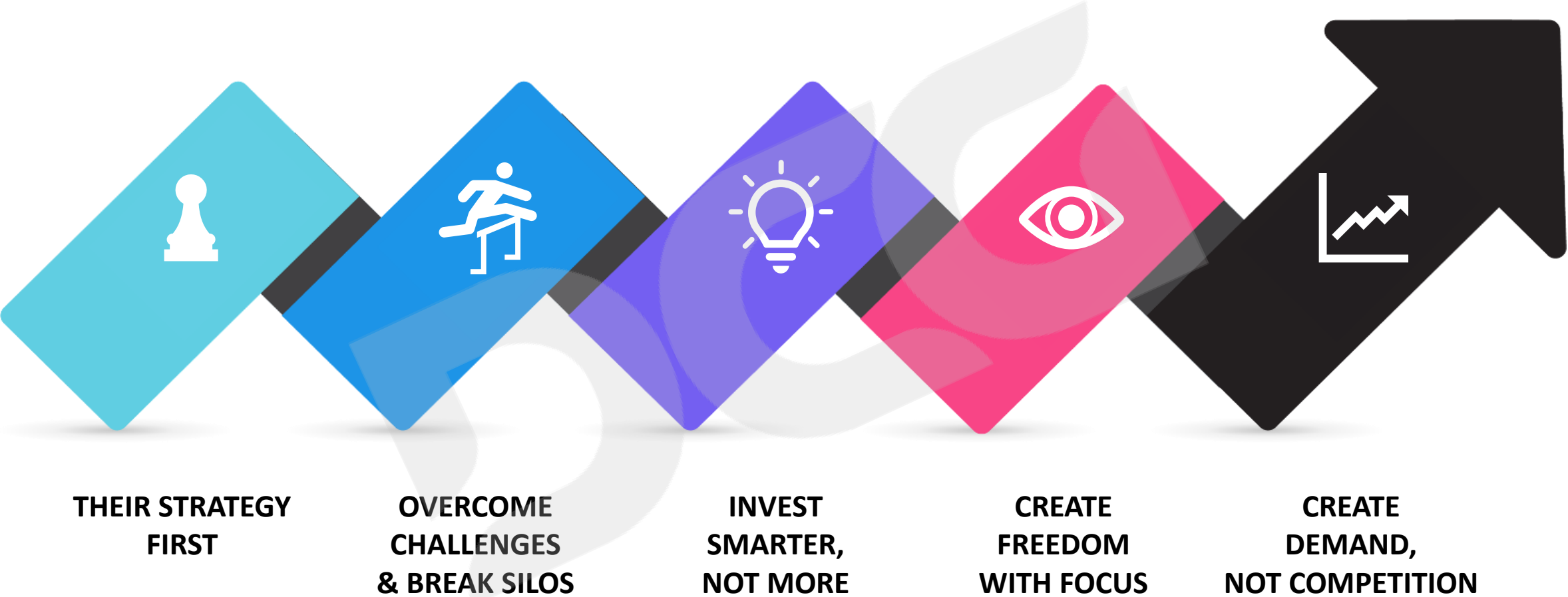
283

-29

ONE SEEC SCORE MATURITY CURVE



WHAT THE DIGITAL COMMERCE LEADERS HAVE IN COMMON



THE \$ BENEFITS OF BEING A LEADER



ONE SEEC SCORE

242

AVERAGE YOY GROWTH %

6.13%

INCREMENTAL \$ GROWTH YOY*

-



ONE SEEC SCORE

249

AVERAGE YOY GROWTH %

9.61%

INCREMENTAL \$ GROWTH YOY*

\$1.7 m



ONE SEEC SCORE

283

AVERAGE YOY GROWTH %

14.3%

INCREMENTAL \$ GROWTH YOY*

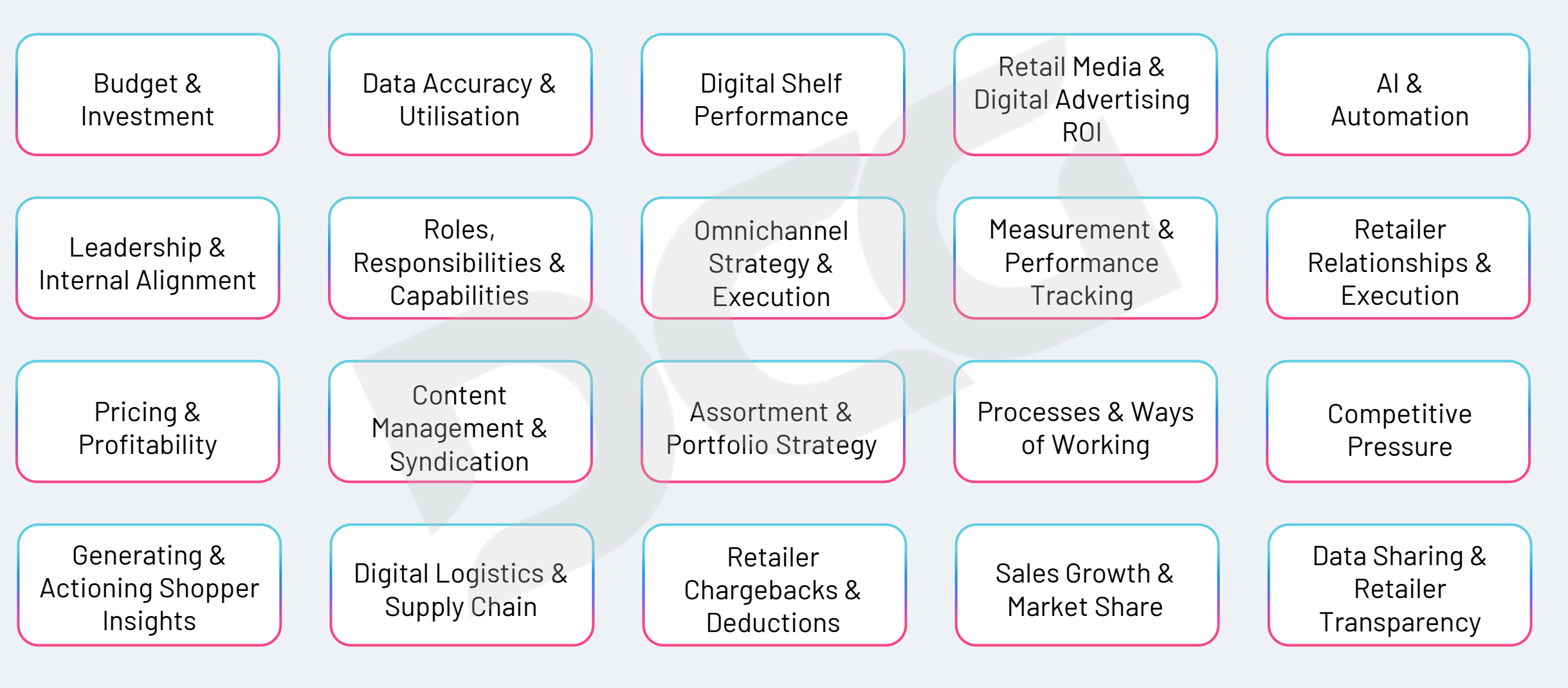
\$4.1 m

*US benchmark intelligence based on every \$50 million of digital commerce sales

\$41m in incremental growth
for every \$500m in
digital commerce revenue

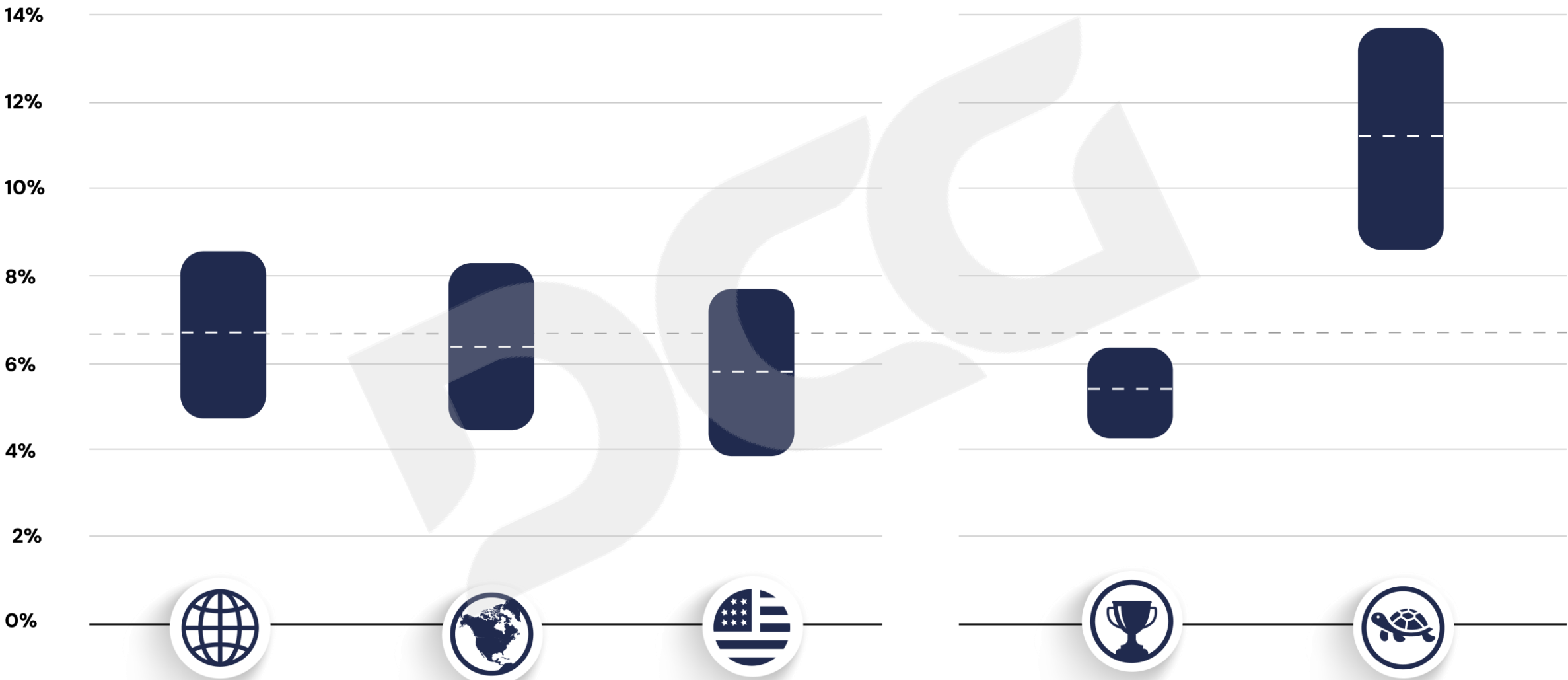


20 COMMON CHALLENGES IN DIGITAL COMMERCE



INVEST SMARTER, NOT MORE

% OF GSV INVESTED IN DIGITAL RETAIL MEDIA



DIGITAL COMMERCE LEADERS



PEOPLE & PARTNERS BEFORE PRICE & PROMOTIONS

CENTRALISE FOR SCALE

LOCALISE FOR ACTION





Retailer and Manufacturer Role



- Range
- Price
- Distribution to Store
- Merchandising
- Promotions
- Marketing
- Events
- 2ndry Space
- Warehousing
- Display
- Media
- Calls to Action
- Incentives
- Loyalty
- Range Prioritisation
- Facings
- Space Planning
- Customer Comms
- Customer Engagement
- Feature



- Manufacturing
- Warehouse Delivery
- Recommended Pricing
- Brand Advertising
- Trade Investment
- Retail Media Creation



e-Retailer and Manufacturer Role



- Range
- Selling Price
- Customer Distribution
- Category Events
- Warehousing
- Customer Returns



- Manufacturing
- Warehouse Delivery
- Recommended Pricing
- Brand Advertising
- Trade Investment
- Retail Media Creation
- Visual Merchandising
- Promotions
- Marketing
- Targeting
- Availability
- Portfolio
- Brand Events
- Secondary Feature
- Media
- Calls to Action
- Loyalty Building
- Range Prioritisation
- Customer Comms
- Customer Engagement
- Profitability Mix
- Search & Content Optimisation
- Product Discoverability
- Display
- Retail Media Activation
- Seasonal Execution

LET'S SPEAK TO THE LEADERS



ANDREA STEELE

AVP ECOMMERCE & CUSTOMER
MARKETING

KRAFTHEINZ



LESLIE LEE

VP DIGITAL EXPERIENCES

HORMEL FOODS



ARTHUR SYLVESTRE

VP DIGITAL COMMERCE

**DANONE
NORTH AMERICA**



GREGOR MURRAY

CHIEF 'SO-WHAT' OFFICER

DCG