



Annual Global Trends

2026



Introduction

The ECR Community Annual Global Trends report provides insight into how retail, manufacturing and service organisations across grocery and CPG are preparing for the year ahead.

The 2026 survey includes 347 responses from industry professionals across Europe, Asia and the Americas. Participants include manufacturers and suppliers (52%), retailers (26%) and service providers (22%), giving a broad view across the sector.

Most respondents are senior professionals, with CEOs (16%), Directors (29%) and Heads of Function (25%) making up the majority, ensuring a strategic perspective.

The survey examines areas expected to influence the sector in 2026:

- Business priorities
- Consumer behaviour
- Strategic challenges
- Technology adoption
- Sustainability
- AI use



***See Appendix 08 for details**

About us

ECR Community (Efficient Consumer Response) is a collaborative platform that brings together retailers, manufacturers and service providers across the grocery and fast-moving consumer goods (FMCG) sector.

The organisation's mission is to facilitate collaboration across the value chain, enabling companies to work together to improve efficiency, innovation and consumer value. Through research, knowledge sharing and industry initiatives, ECR Community supports businesses in addressing common challenges and identifying opportunities for growth.

By bringing together experts from different parts of the industry and the globe, ECR Community helps organisations:

- Share best practices
- Identify emerging trends
- Accelerate innovation
- Deliver greater value to consumers



Why ECR Community publishes the Annual Global Trends Report

ECR Community Annual Global Trends offers industry leaders a clear, data-driven overview of the main trends influencing the global grocery and FMCG sector.

Each year, the report gathers insights from professionals across the value chain to understand how businesses are responding to shifting market conditions, technological innovations and new consumer expectations.

The publication aims to:

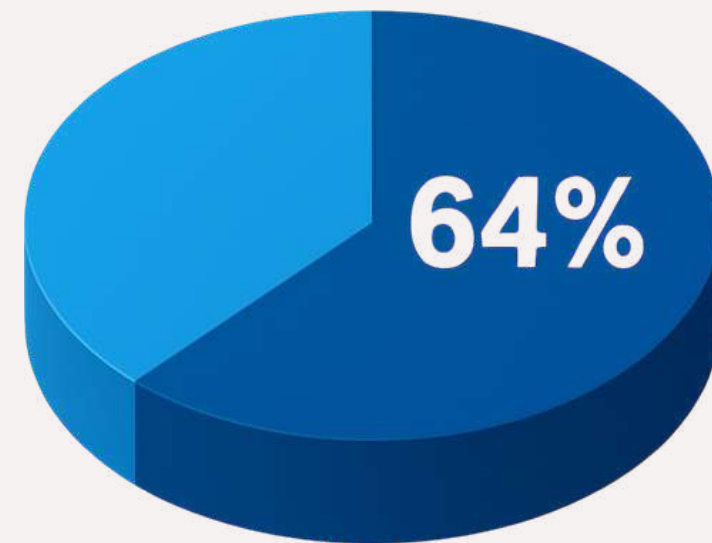
- Identify strategic priorities across the industry
- Highlight emerging technologies and innovation trends
- Provide insight into consumer behaviour shifts
- Support strategic decision-making for retailers and manufacturers
- Encourage collaboration and knowledge sharing across the sector
- Compare the results from 2025 and 2026

By sharing these insights openly with the market, ECR Community helps industry stakeholders better understand the challenges and opportunities ahead, enabling organisations to make more informed strategic decisions.

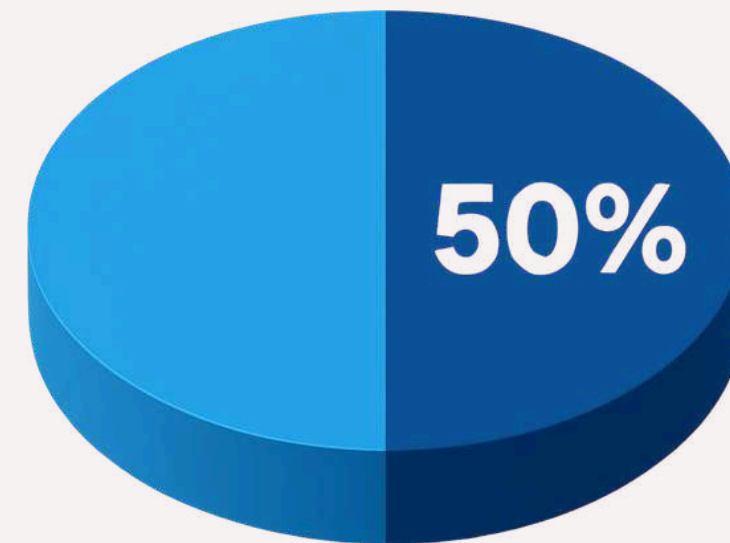


Business Priorities for 2026

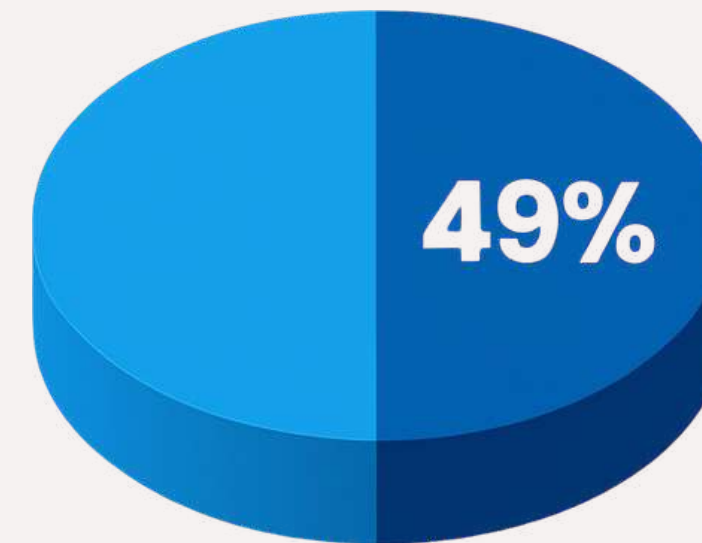
Top 3 Priorities in 2026



Identified improving **operational efficiency** as one of their top three priorities for 2026, making it the most frequently selected strategic focus.



Organisations are continuing to invest in **Digital transformation and automation** that improves supply chain visibility, automates manual processes and enables more data-driven decision-making.



With consumers becoming increasingly price-sensitive, companies are focusing on **pricing & profitability strategies**.

*See appendix 01 for details



Business Priorities for 2026

Top priorities for retailers & manufacturers

Operational Efficiency

was selected by:

74% retailers and
64% manufacturers

as a Top Priority.

Pricing and Profitability

was selected by:

48% of retailers and
58% of manufacturers



*See appendix 01 for details

Comparison: Business Priorities 2025 vs 2026

The industry is transitioning from a reactive cost control position to a proactive, data-led growth and transformation position, with clear differences in how **retailers & manufacturers** apply this shift.

- **2025:** Stabilise, protect margins and manage disruption
- **2026:** Optimise performance, invest in AI and build long-term capability



Retailers 2025 vs 2026

2025: focused on sales protection and inflation pressure.

2026: shifts to data, efficiency and capability building.

Shift: Short-term price & volume to performance through data and insight.



Manufacturers 2025 vs 2026

2025: focused on stability and margin protection.

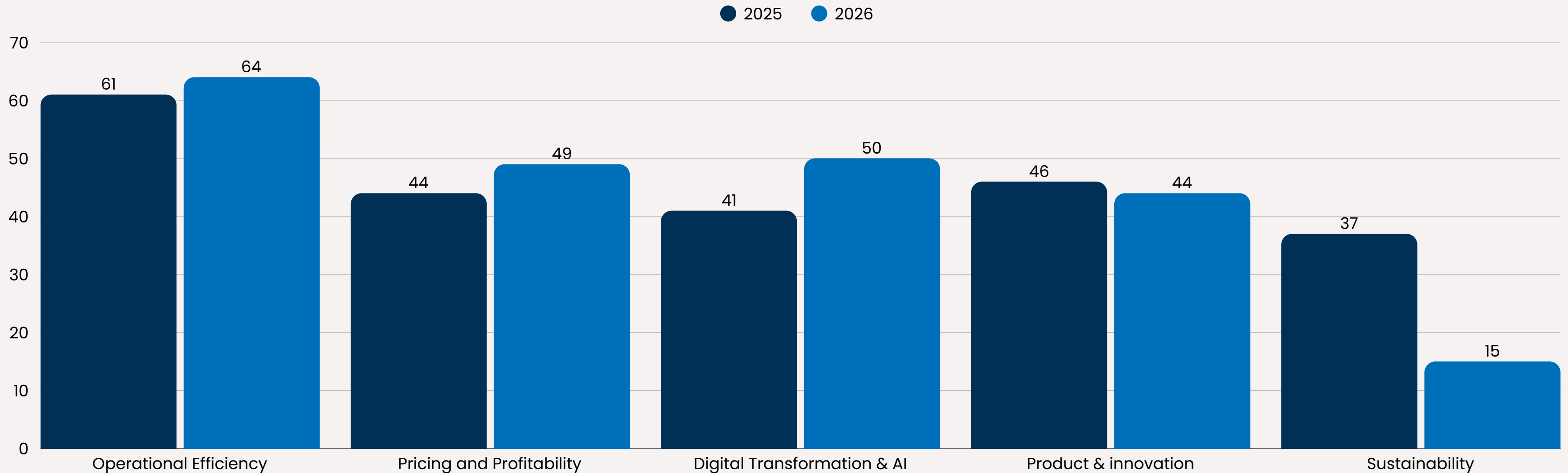
2026: shifts to growth optimisation and data-driven decisions.

Shift: Defensive cost management to managing growth and performance through data.

ECR Annual Global Trends: 2025 vs 2026

Between 2025 and 2026, the ECR Annual Global Trends showed that the sector continues to face familiar pressures from costs, competition and value. However, the top business priorities are now diverging among retailers, suppliers and service providers, with growing attention on AI, data and technology-driven efficiency.

There is a remarkable decline in sustainability as a top business priority in 2026.



The CEO View

Operational efficiency

60%

of CEOs identify improving operational efficiency as a top priority, reflecting a strong focus on cost control and productivity to protect margins in a challenging environment.

Digital transformation

53%

of CEOs prioritise digital transformation, automation and AI, highlighting the role of technology in improving speed, reducing costs and supporting decision-making

Pricing and profitability

53%

of CEOs focus on pricing and profitability strategies, as organisations respond to ongoing cost pressures, inflation and competitive dynamics by protecting margins and managing price more effectively.

CEOs have placed greater emphasis on digital transformation, as well as pricing and profitability, compared to the broader results.

Consumer Behaviour Trends in 2026

53%

Indicate a stronger focus on **affordability and value**, reflecting the current economic climate. Ongoing cost of living pressures, housing costs, inflation and global instability are leading consumers to pay closer attention to prices and seek better value in their purchasing decisions.

12%

Highlight **health and wellness** as a key focus, with continued interest in healthier food options, nutritional transparency and products that support wellbeing.

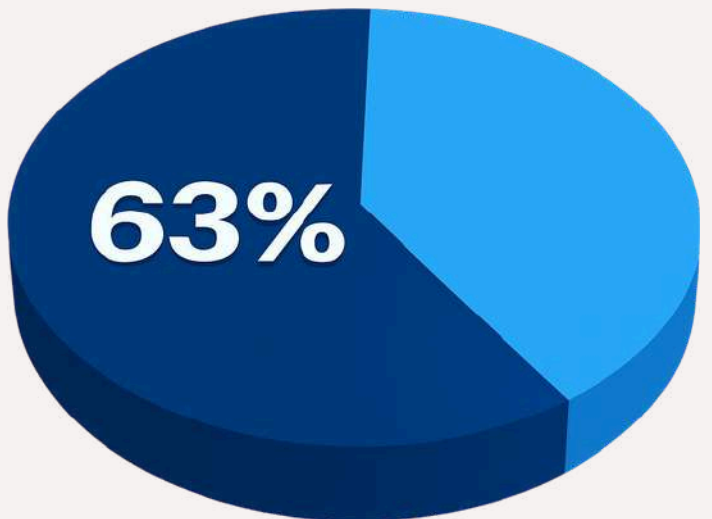
10%

Point to **convenience and delivery speed**, reflecting the importance of fast fulfilment and seamless shopping experiences for consumers.

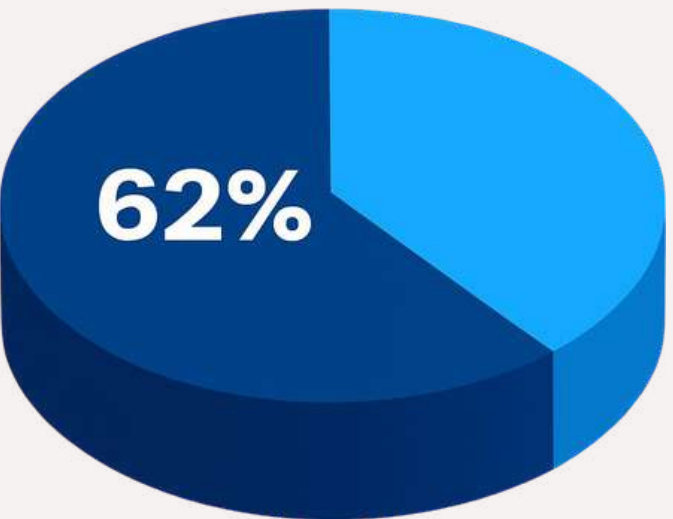
10%

Predict there will be increasing demand for **own label and private label** products.

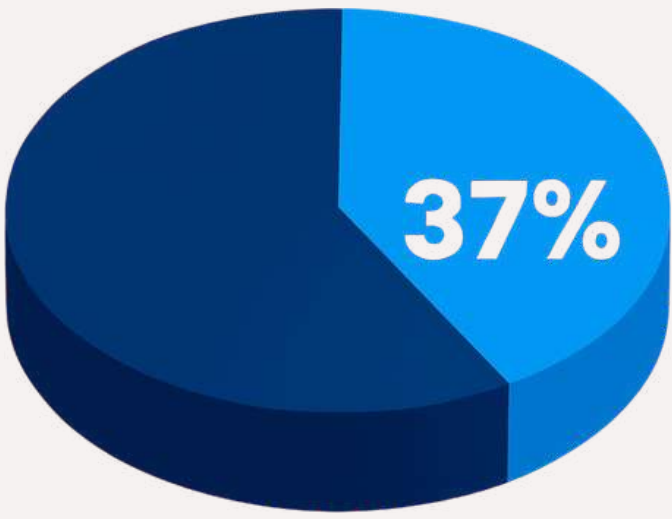
What are the biggest challenges your business expects to face in 2026?



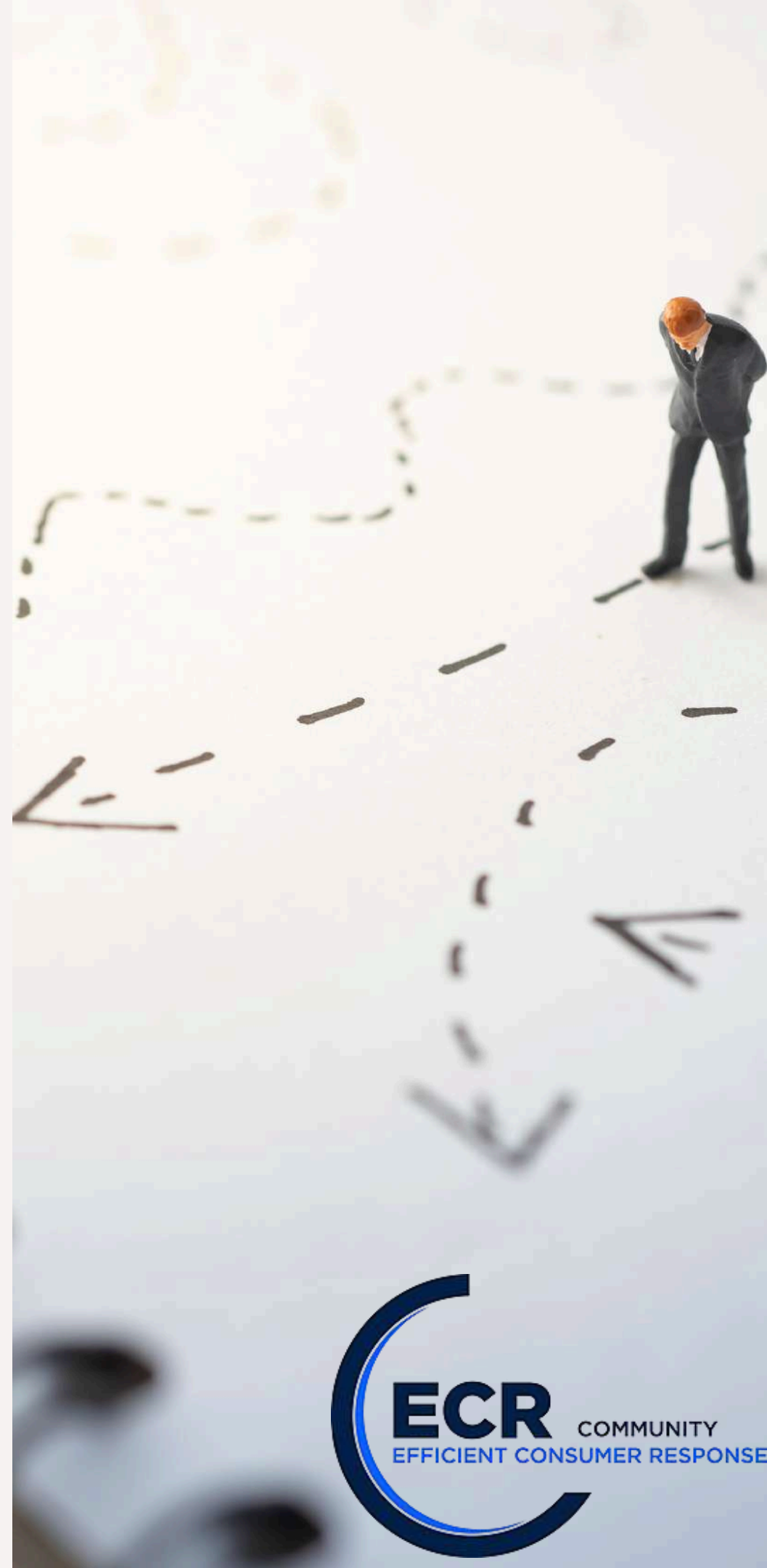
Identified **competition and market share pressure** as a key challenge, highlighting the competitive nature of the grocery and FMCG sectors.



Inflation and cost management remains a major concern, as organisations balance pricing, margins and operational efficiency.



highlight keeping pace with **Technology and AI adoption** as a challenge, reflecting the need for ongoing investment and the pace of change in digital capabilities.



*See appendix 03 for details





***See appendix 04 for details**

What are the biggest challenges your business expects to face in 2026?

Top challenges for retailers, manufacturers & service providers

Retailer

67% of retailers fear competition, 57% stress over rising costs, 40% worry about keeping up with tech/AI.

Supplier

64% of suppliers battle inflation/input costs, 24% face retailer negotiations, 22% stress supply chain issues.

Service provider

58% of service providers focus on staying tech-ahead & 58% mention inflation, while 53% fight for new clients

Comparison: Challenges Facing Businesses 2025 vs 2026

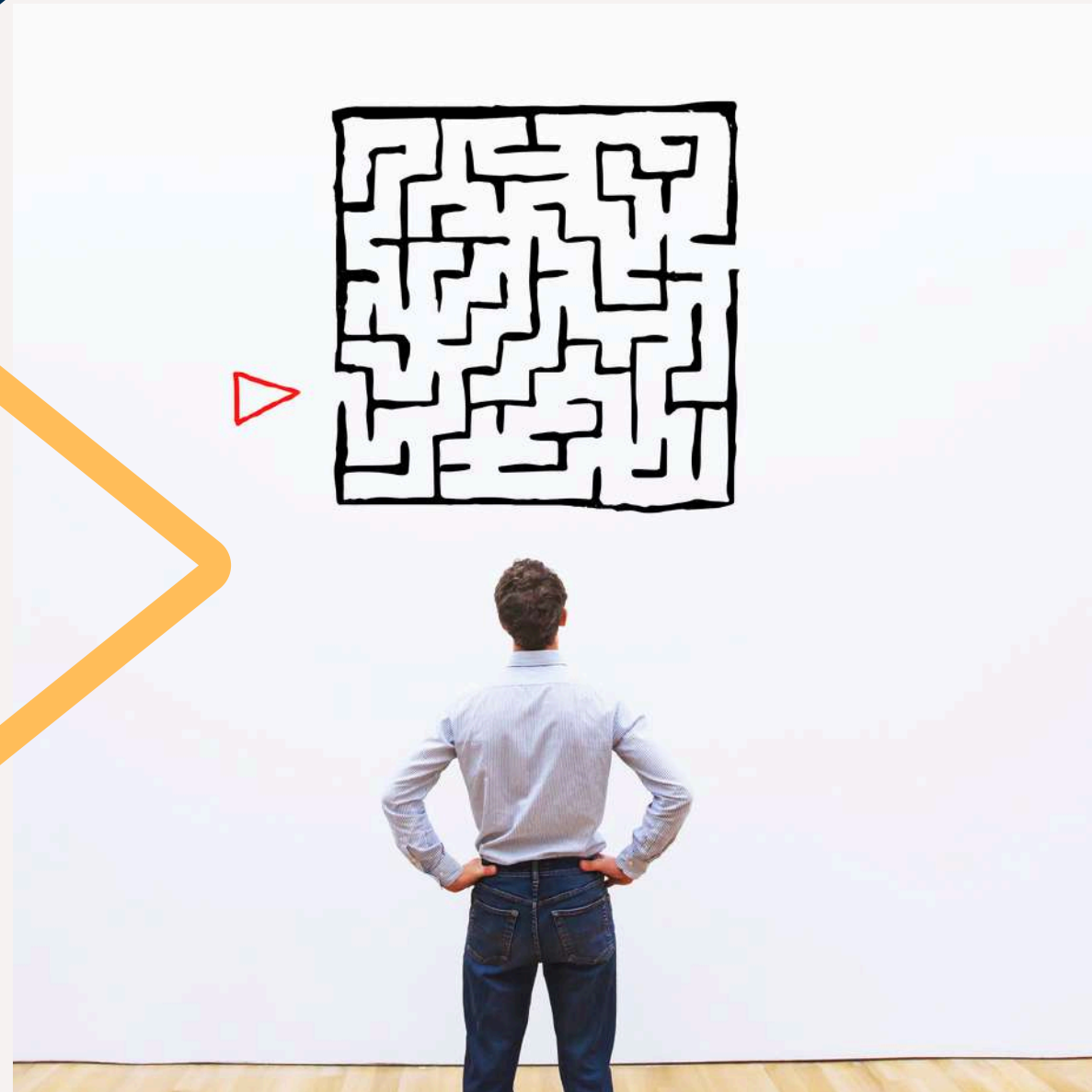
The results show that while cost pressure and competition remain dominant, the nature of challenges is evolving.

In 2025, challenges were primarily externally driven, led by inflation, supply chain disruption and cost volatility.

In 2026, these pressures remain, but there is a stronger shift towards internal capability challenges, particularly keeping pace with technology and AI adoption, alongside continued competition and margin pressure.

Competition and market share pressure emerges as the most consistent and intensifying challenge, reflecting a saturated and highly competitive market. At the same time, inflation and cost management remain critical, though slightly less acute than in 2025.

A notable development in 2026 is the rise of technology adoption as a constraint, not just an opportunity, highlighting the growing gap between ambition and execution.



Comparison: Challenges Facing Businesses 2025 vs 2026



Retailers (2025 vs 2026)

2025: focused on inflation, costs and supply issues.

2026: shifts to competition, shopper change and digital capability.

Shift: Cost pressure → cost + shopper and digital adaptation.



Manufacturers (2025 vs 2026)

2025 focused on cost inflation, supply disruption and retailer pressure.

2026 shifts to competitiveness, pricing and AI/data expectations.

Shift: Supply chain disruption → commercial and capability pressure.



Service Providers (2025 vs 2026)

2025: focused on supporting cost and operational stability.

2026: shifts to tech change, proving ROI and differentiation.

Shift: Supporting stability → demonstrating value in transformation.





*See appendix 06 or details

Technology and Innovation Trends in 2026

30%

Identified agentic and generative AI as the technologies most likely to affect the sector, followed closely by data analytics and predictive tools at 27%.

Suppliers

28% of suppliers/manufacturers prioritise data analytics & predictive tools, followed by AI/generative (22%).

Retailers

27% of retailers see agentic & generative AI as their top impact, followed by data analytics (26%).

Service providers

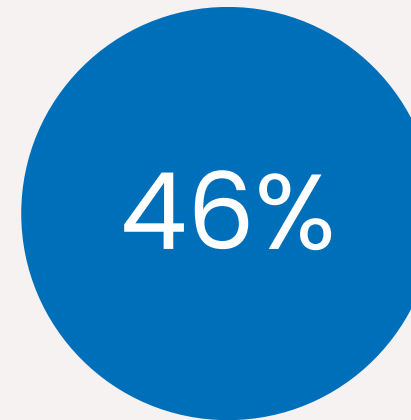
50% of service providers bet heaviest on AI/generative to stay ahead of client needs, followed by data analytics (26%).

Of the technologies or innovations that respondents believe will have the greatest impact on business in 2026, the unsurprising overwhelming choice was for AI/generative and data analytics.

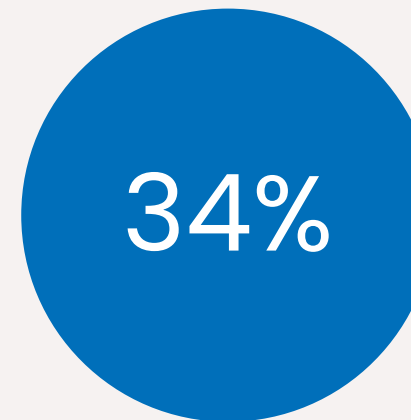
Sustainability

Sustainability is seen as important but not the top priority compared with efficiency, value and technology and its priority has reduced significantly since 2025. (see page 08 & appendix 01)

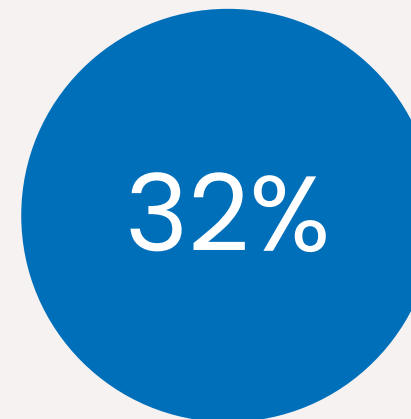
If sustainability is a focus, what areas are being prioritised?



Circular economy initiatives represent the most common focus, these initiatives include reducing waste, redesigning packaging, increasing recycling rates and improving product durability. As environmental regulation and consumer expectations continue to evolve, circular practices are likely to become more prominent within product development and supply chain management.



Sustainable innovation, reflects efforts to develop products and processes with reduced environmental impact while maintaining product quality and consumer value.



Health and wellness, highlighting the growing connection between sustainability, product composition and consumer wellbeing. In many cases, sustainability strategies are increasingly linked to product transparency and nutritional considerations.

*See appendix 07 or details



What is one trend that will define the grocery and CPG sector in 2026?

01

..... A shift towards **affordability and value** is set to define 2026, driving assortment decisions, private label growth and more targeted promotions.

02

..... **AI and automation** are moving into implementation, with businesses embedding them across forecasting, pricing, personalisation and category management to improve speed and decision-making.

03

..... **Operational efficiency** across the value chain, particularly in supply chain and in-store execution, remains a priority as organisations manage cost pressures and margin constraints.

Retailers

Prioritise affordability, private label growth and adapting to changing shopper behaviour, alongside strengthening digital engagement and personalisation across the omnichannel experience.

Suppliers

Prioritise cost management and productivity, using AI to inform category and pricing decisions, while focusing on product innovation to balance value and differentiation.

Service Providers

Prioritise technology and data as drivers of change, with AI, advanced analytics and retail media as key growth areas, alongside stronger collaboration to support retailers and suppliers



Overall Insights

The ECR Community Annual Global Trends 2026 shows an industry undergoing significant change. Organisations across grocery and consumer goods are balancing operational efficiency with investment in digital transformation.

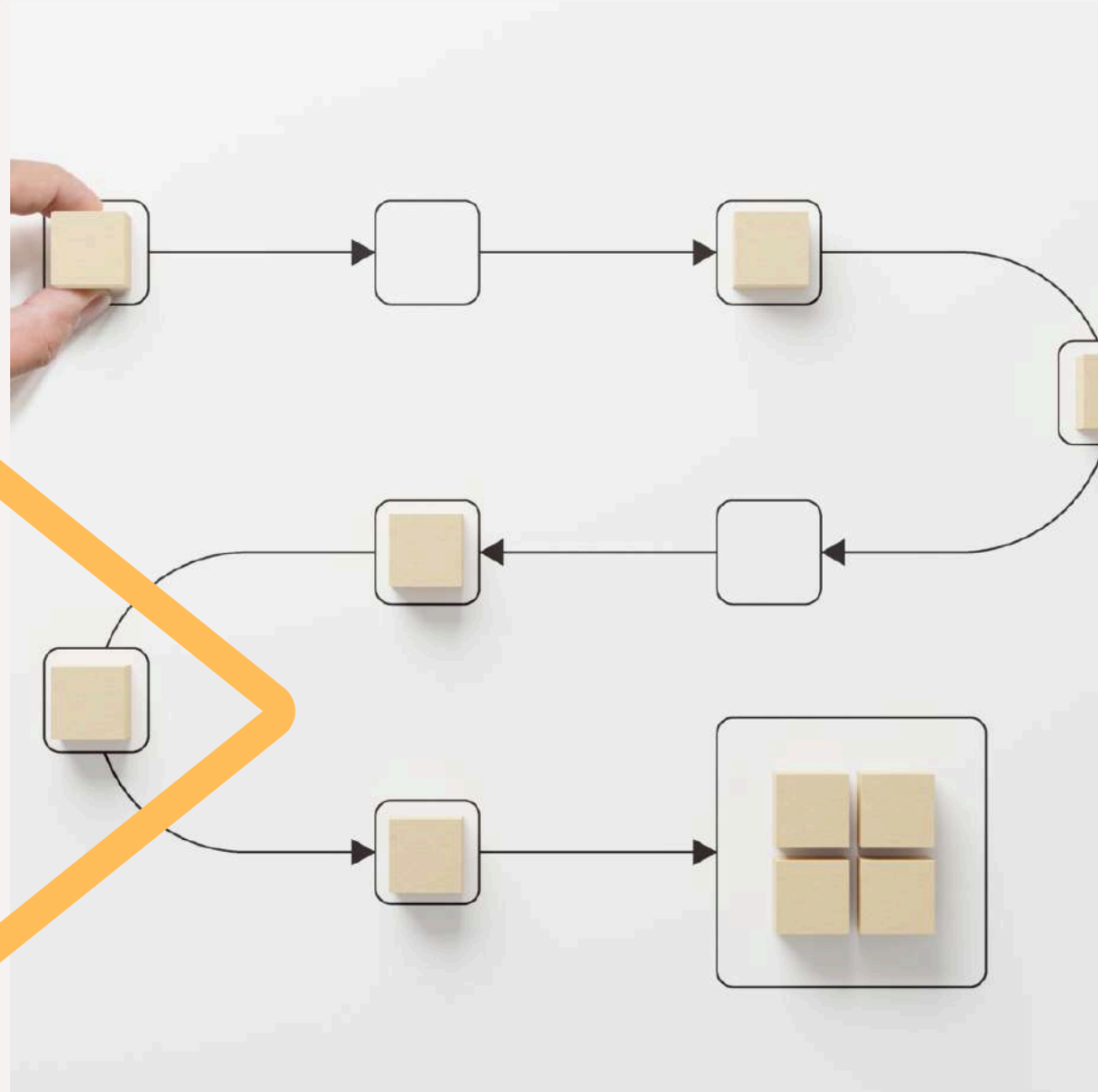
Operational performance remains the primary focus, reflecting ongoing pressure from inflation, cost volatility and competition. At the same time, companies are investing in digital technologies, automation and analytics to improve productivity and decision-making.

Consumer behaviour is shifting, with affordability and value defining 2026. While sustainability and health remain relevant, purchasing decisions are increasingly driven by price.

Adoption of AI and advanced analytics is increasing, though most organisations remain in the early to mid stages, focusing on practical applications such as forecasting, data analysis and productivity tools.

Sustainability remains part of business planning, with attention on circular economy initiatives, sustainable innovation and regulatory requirements.

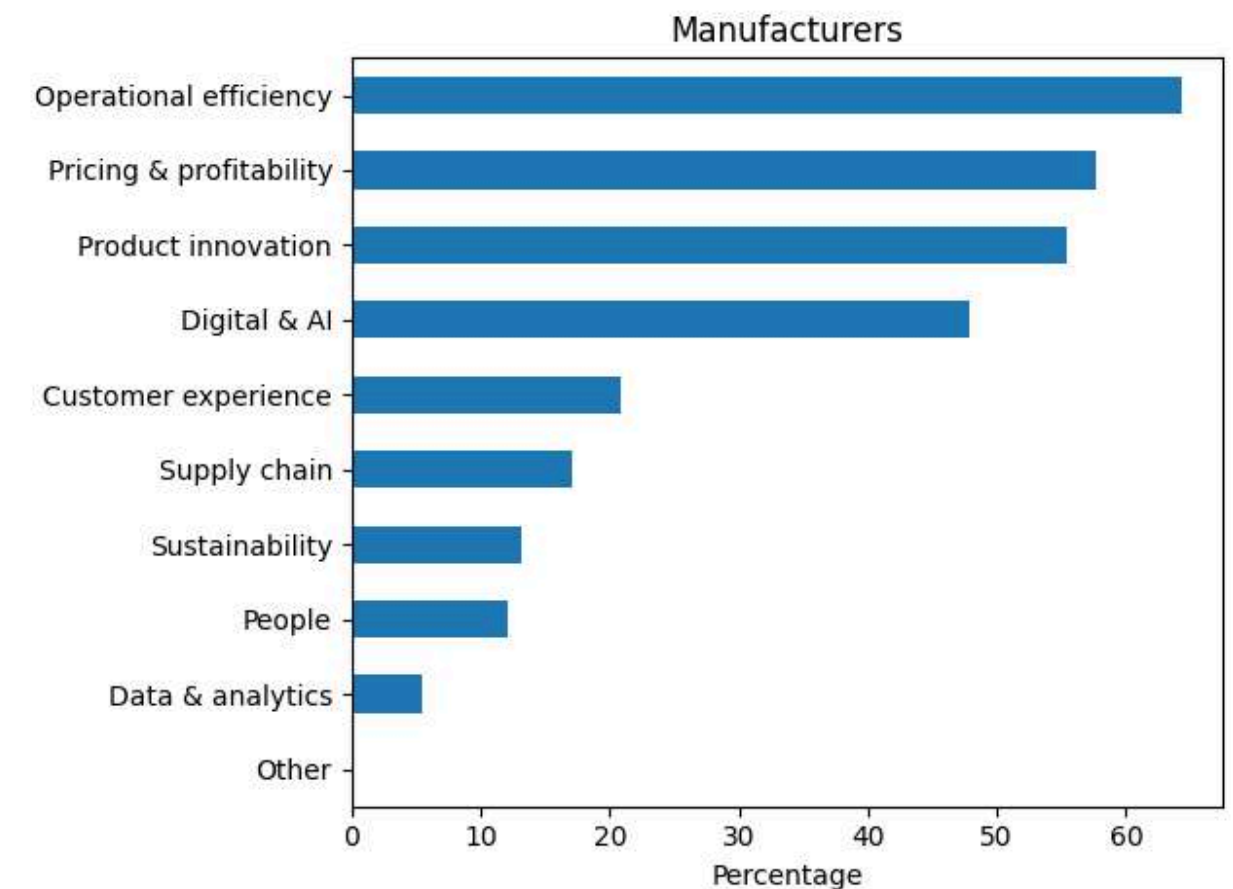
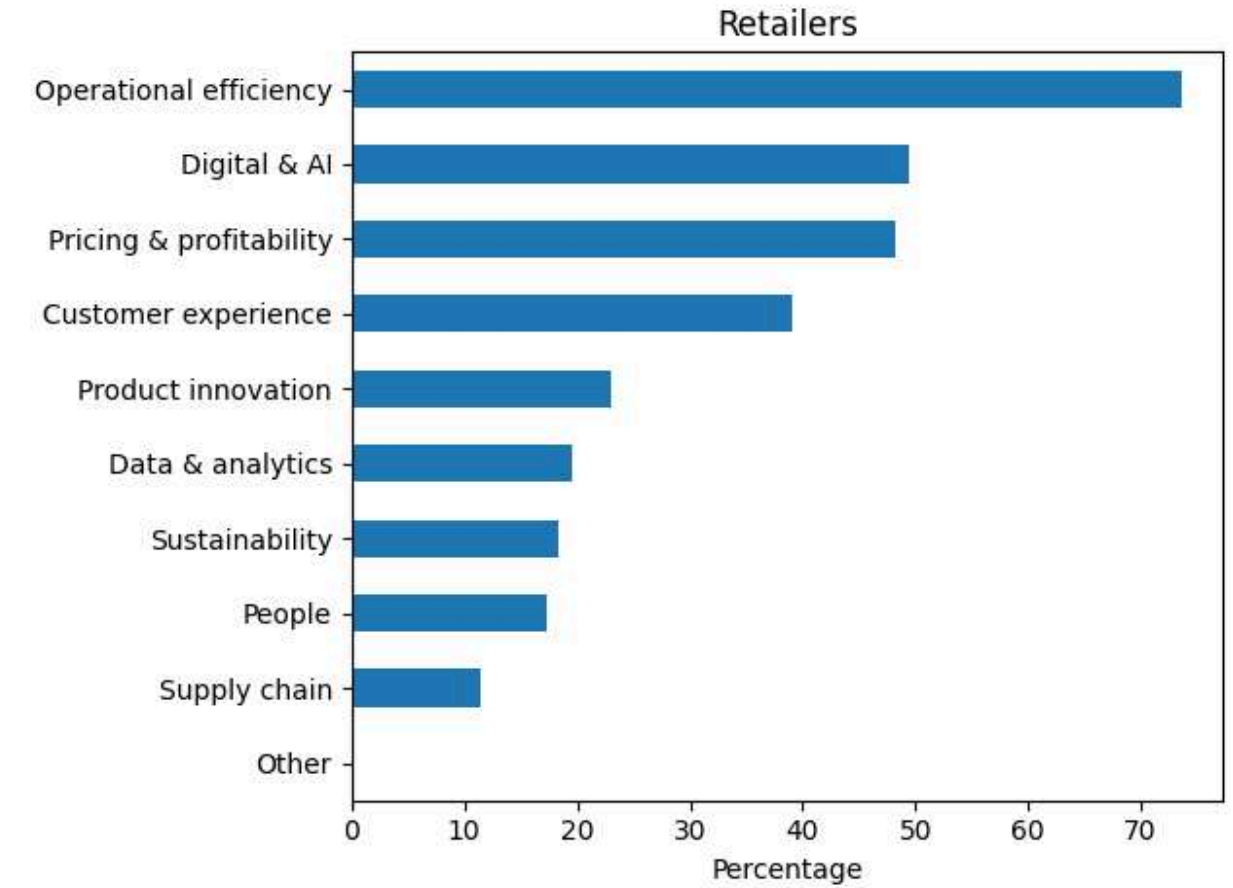
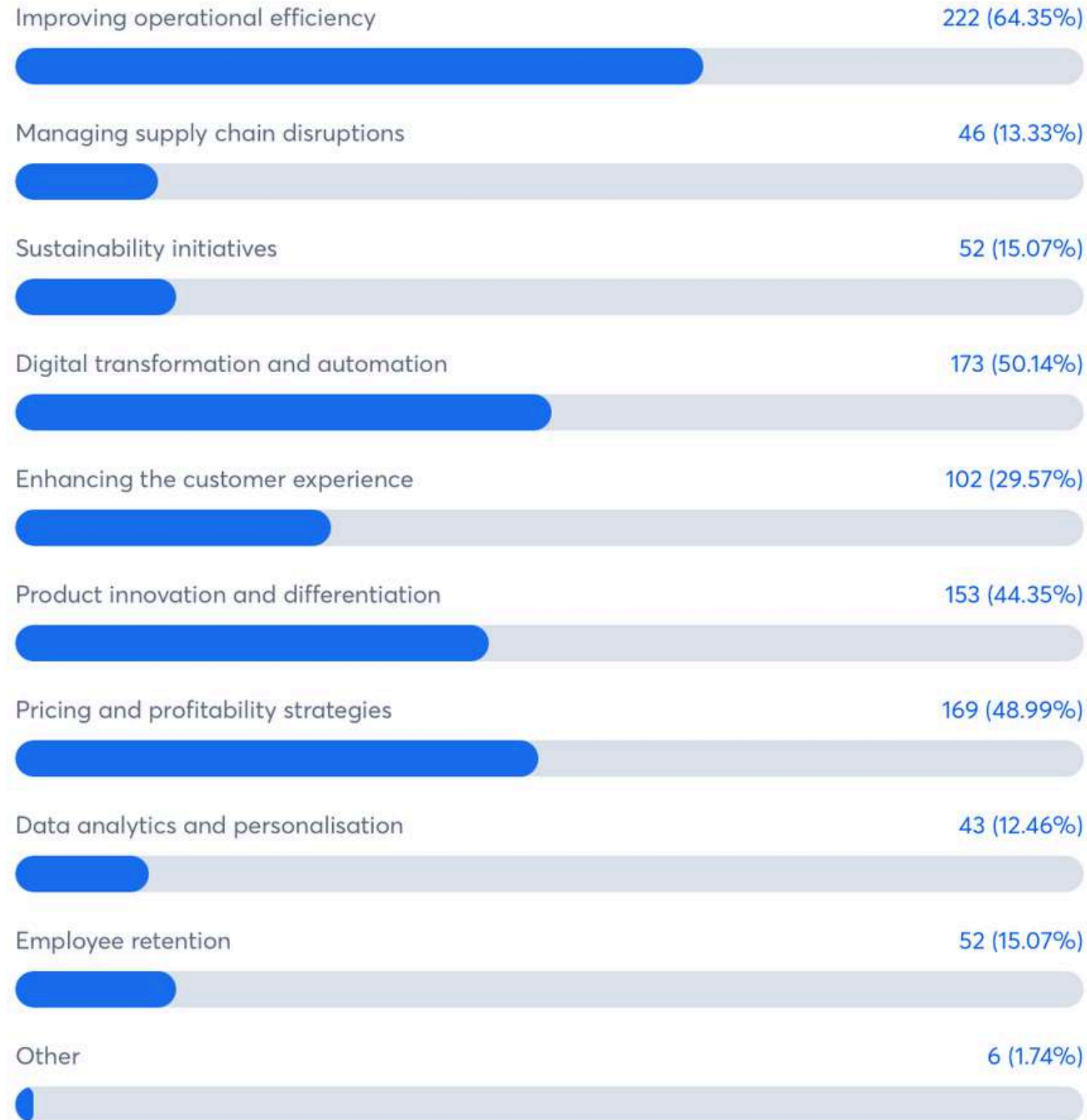
Overall, the survey indicates an industry adapting to a constrained environment, with success depending on execution, technology investment and alignment with consumer demand.





Appendices

Appendix 01 – Q1. What are the top priorities for your organisation in 2026?



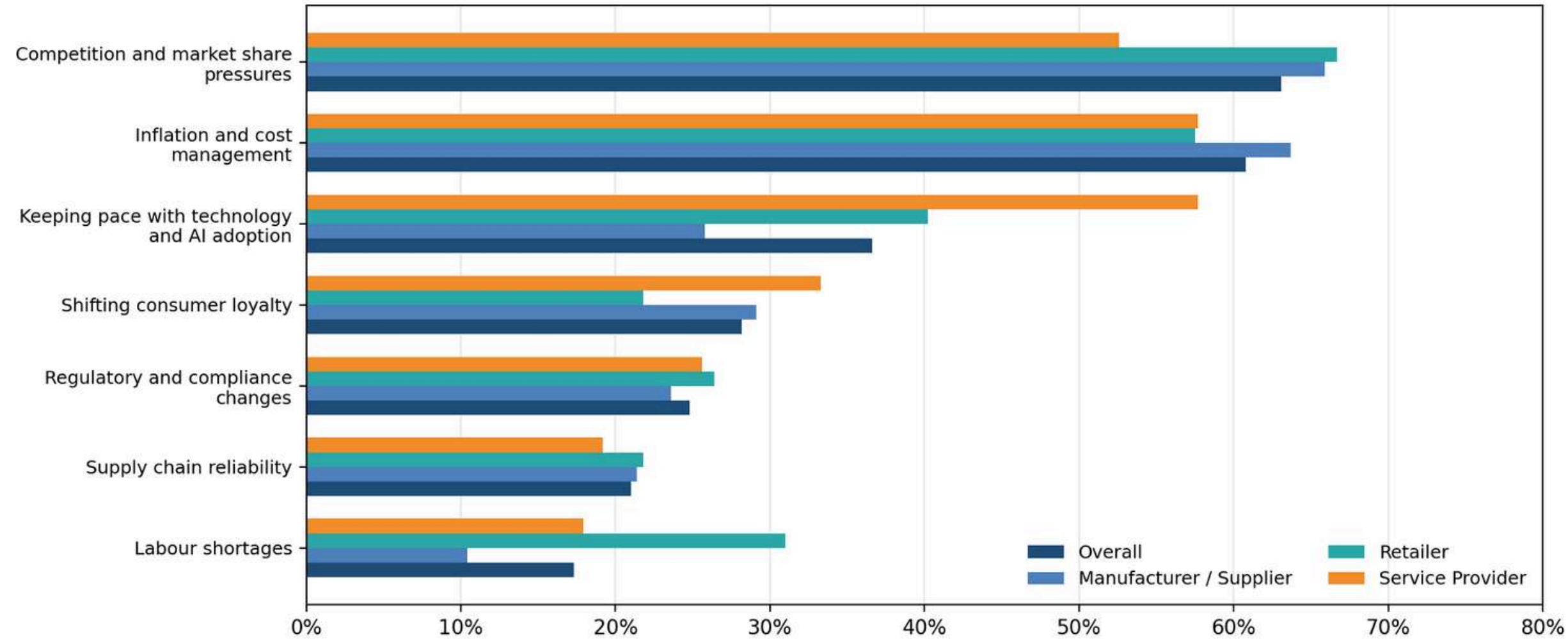
Appendix 02 – Q2. How do you anticipate consumer behaviour will shift most in 2026?



Appendix 03 – Q3. What are the biggest challenges your business expects to face in 2026?

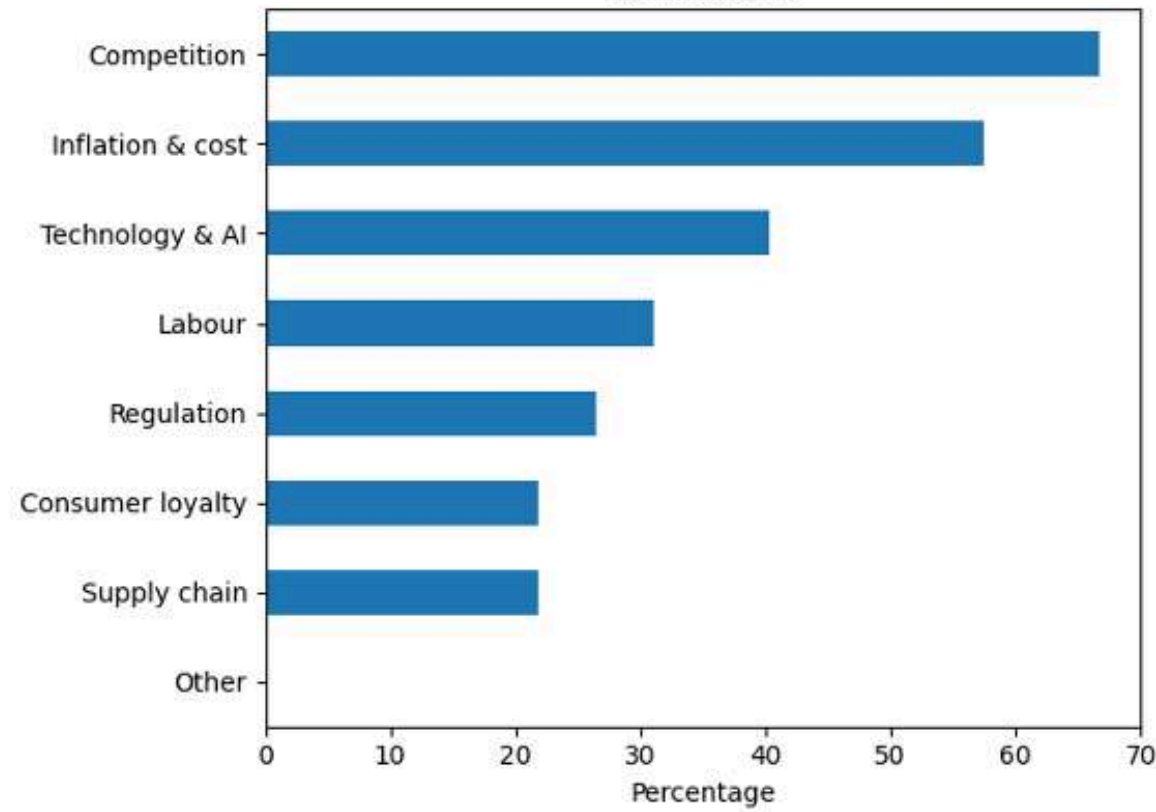


2026 business challenges by company type

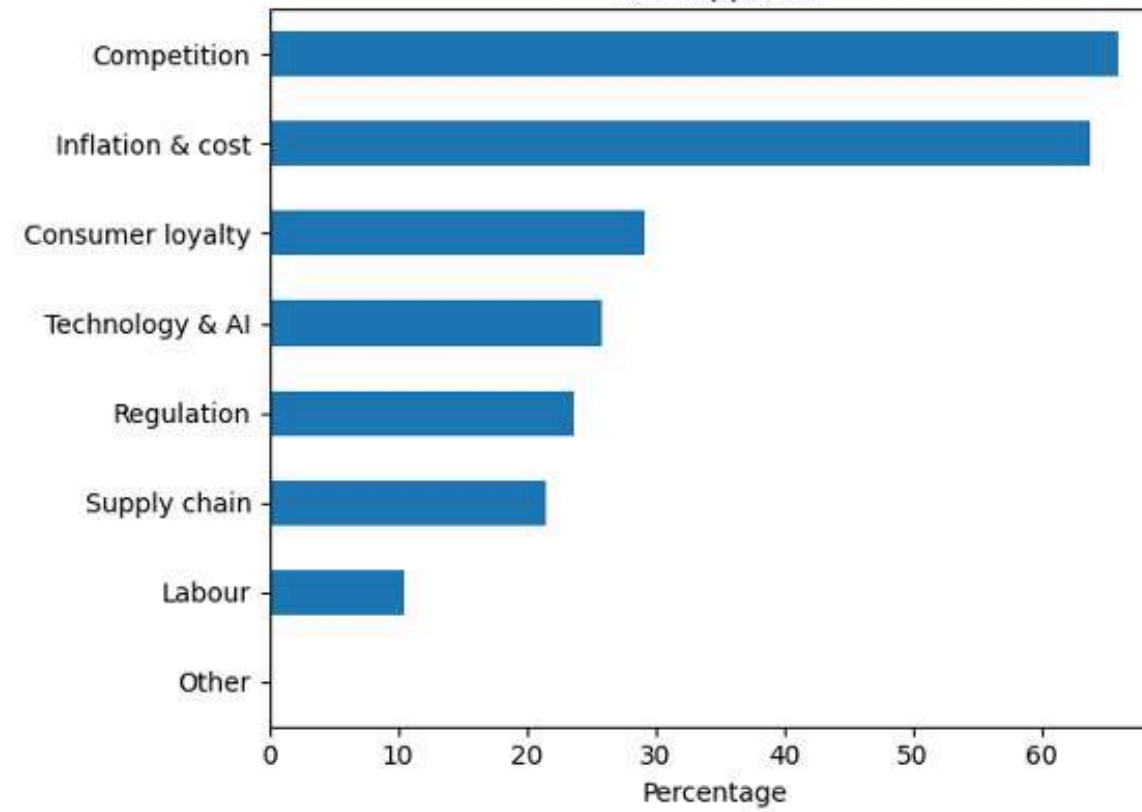


Appendix 04 – Q3. What are the biggest challenges your business expects to face in 2026?

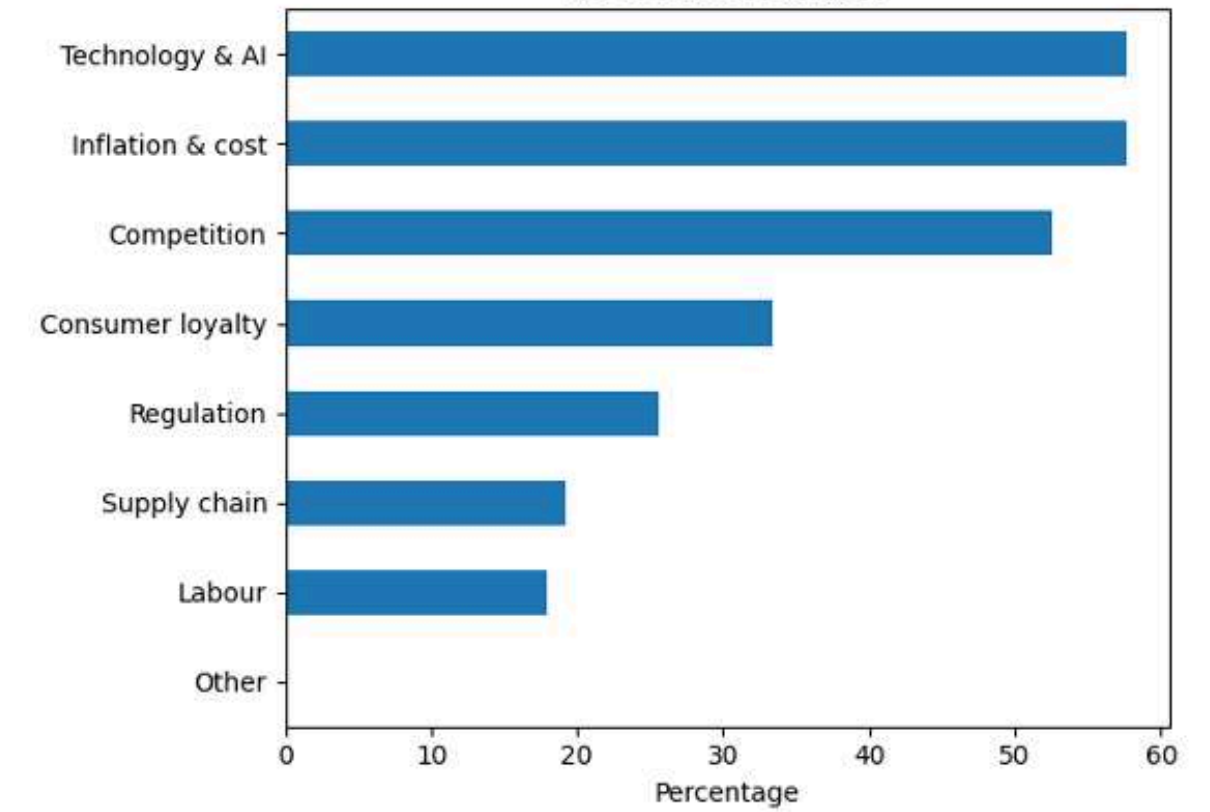
Q3 Retailers



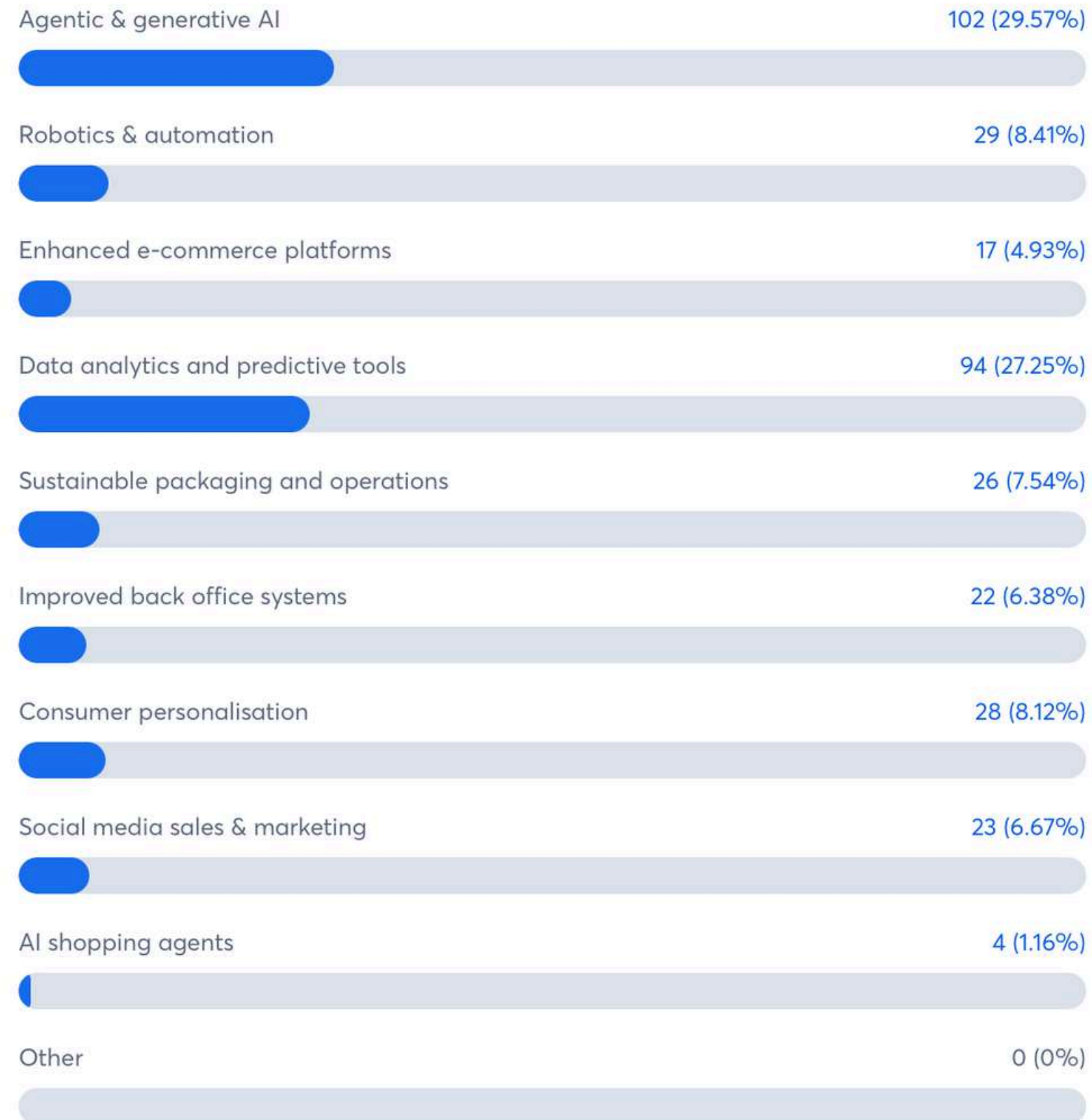
Q3 Suppliers



Q3 Service Providers

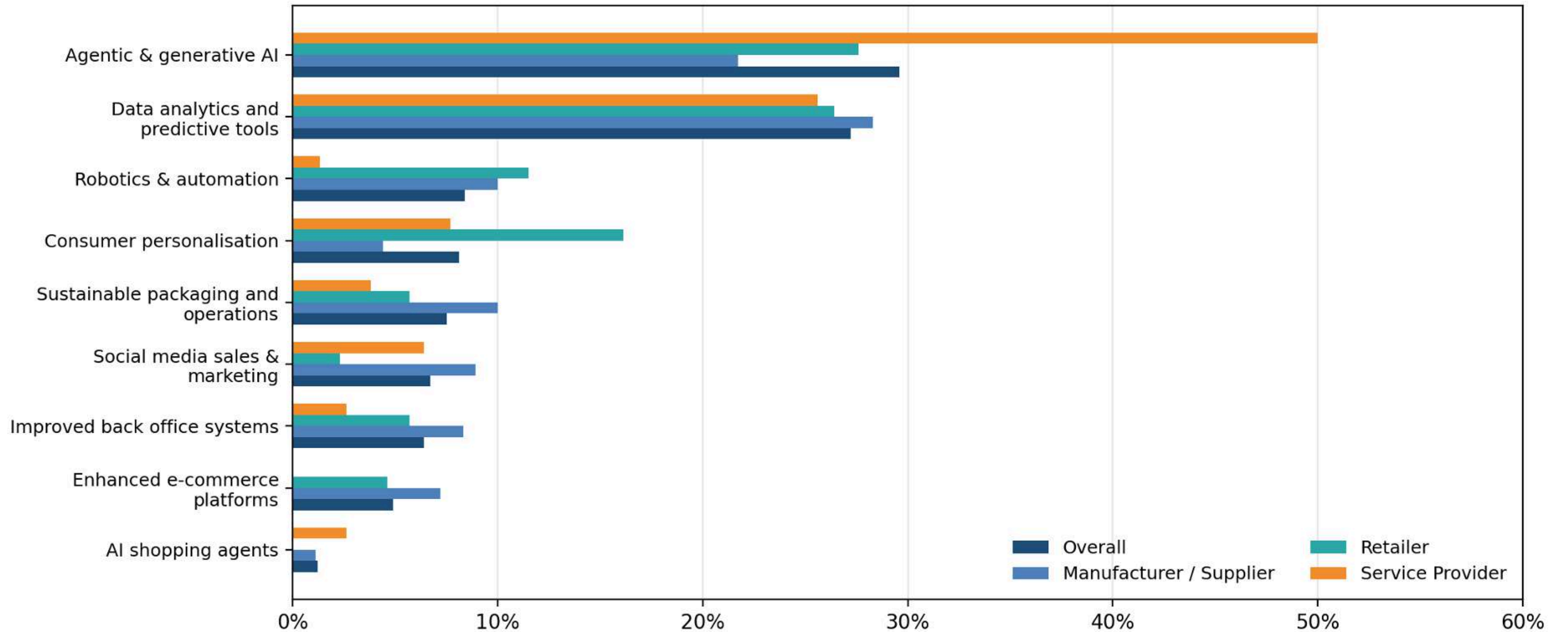


Appendix 05 – Q4. Which of these technologies or innovations do you believe will have the greatest impact on your business in 2026

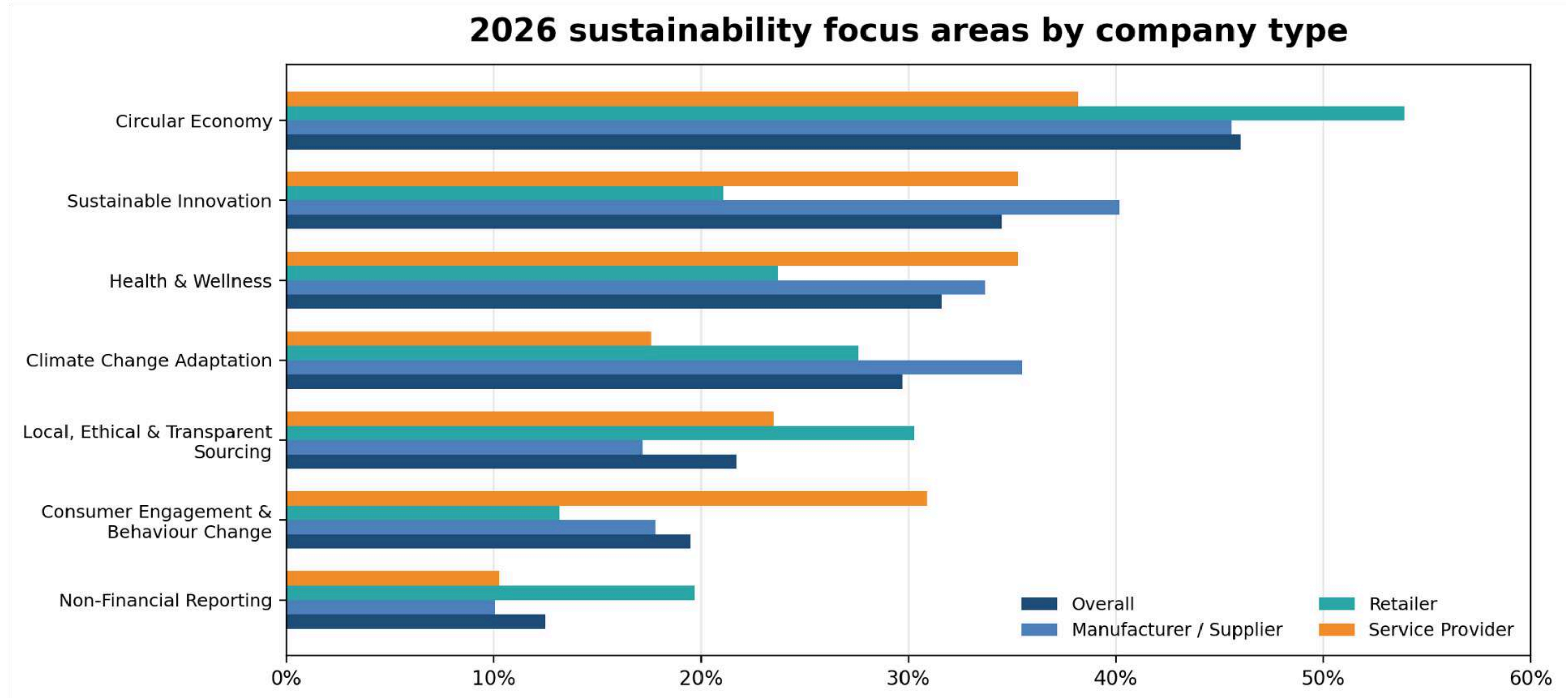


Appendix 06 – Q5. Which of these technologies or innovations do you believe will have the greatest impact on your business in 2026

2026 technology impact by company type



Appendix 07 – Q6. If sustainability is a focus, what areas are you prioritising for the year ahead



Appendix 08 – Geographic & Demographic

