



ECR COMMUNITY ANNUAL GLOBAL TRENDS 2025



Why an ECR Community Annual Global Trends?

ECR Community is a group with 19 national ECR Associations in LatAm, Asia and Europe working together to promote the principles of Efficient Consumer Response.

Each national ECR Association is connected with many local retailers, suppliers & service providers in their domestic retail & CPG sectors. The amalgamation of these connections represents an enormous network of companies which allows ECR Community privileged access to a very senior, diverse and significant global network.

As the global retail & CPG marketplace evolves continuously with ever changing shopper behaviour, game changing technological innovation and worldwide geopolitical influence, ECR Community is perfectly positioned to access its global network to determine **what matters most for companies in 2025**.

Hence, ECR Community is delighted to launch this inaugural ECR Annual Global Trends 2025, to identify the most important trends and track & benchmark variances in future years accordingly.



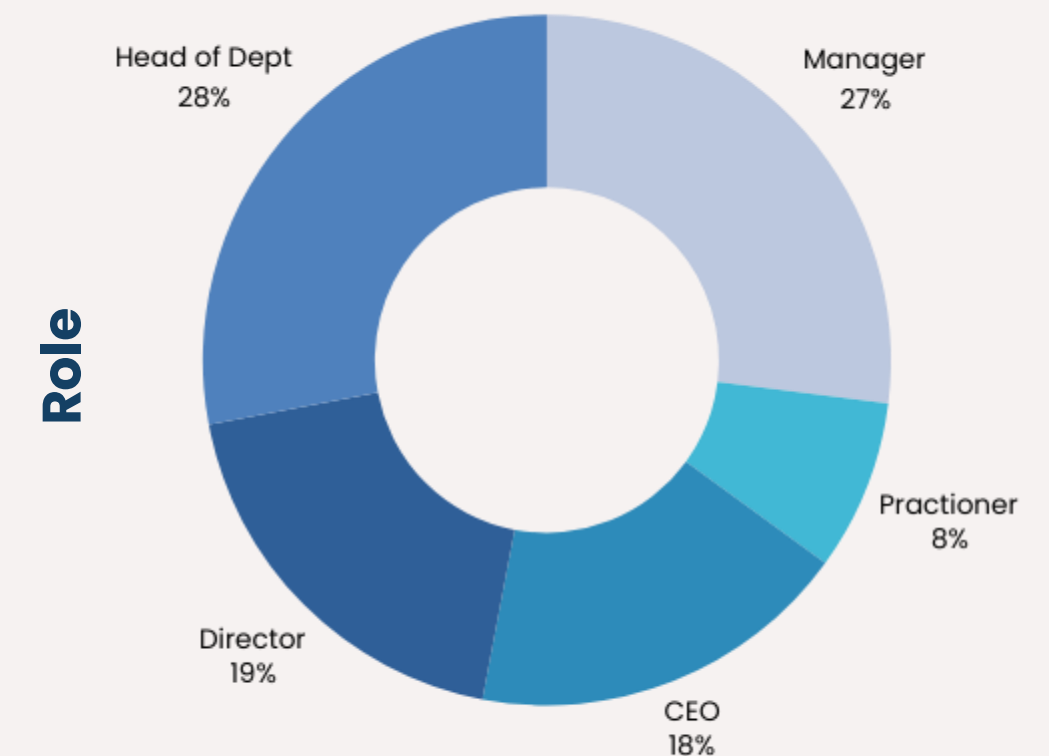
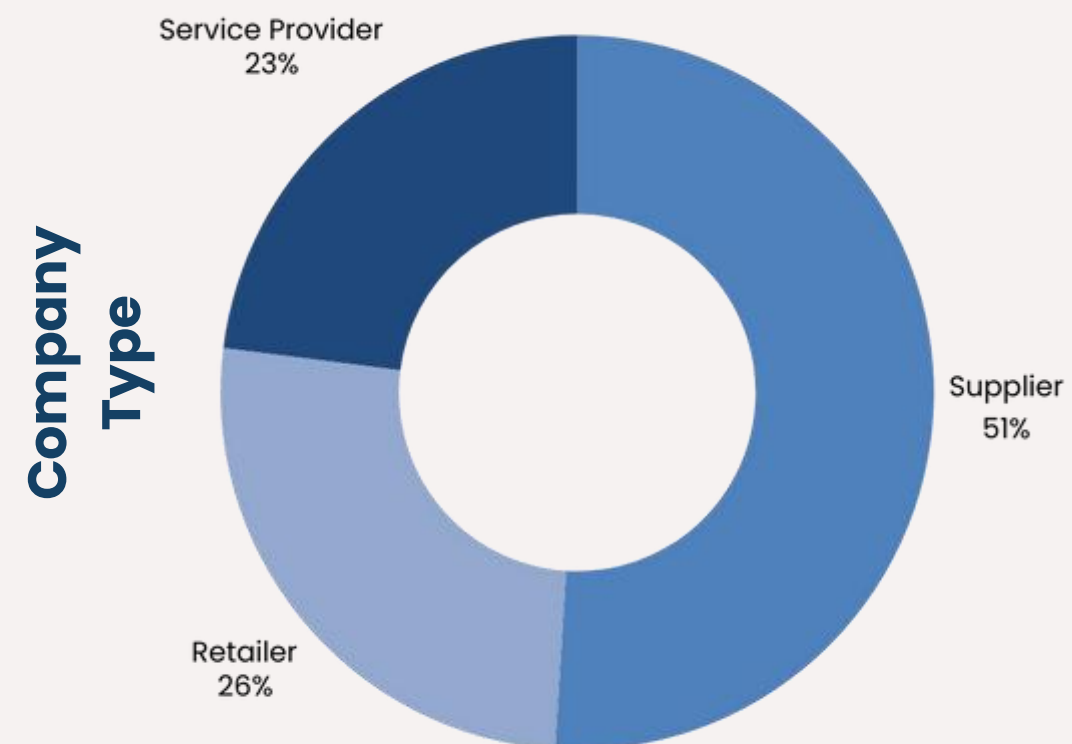
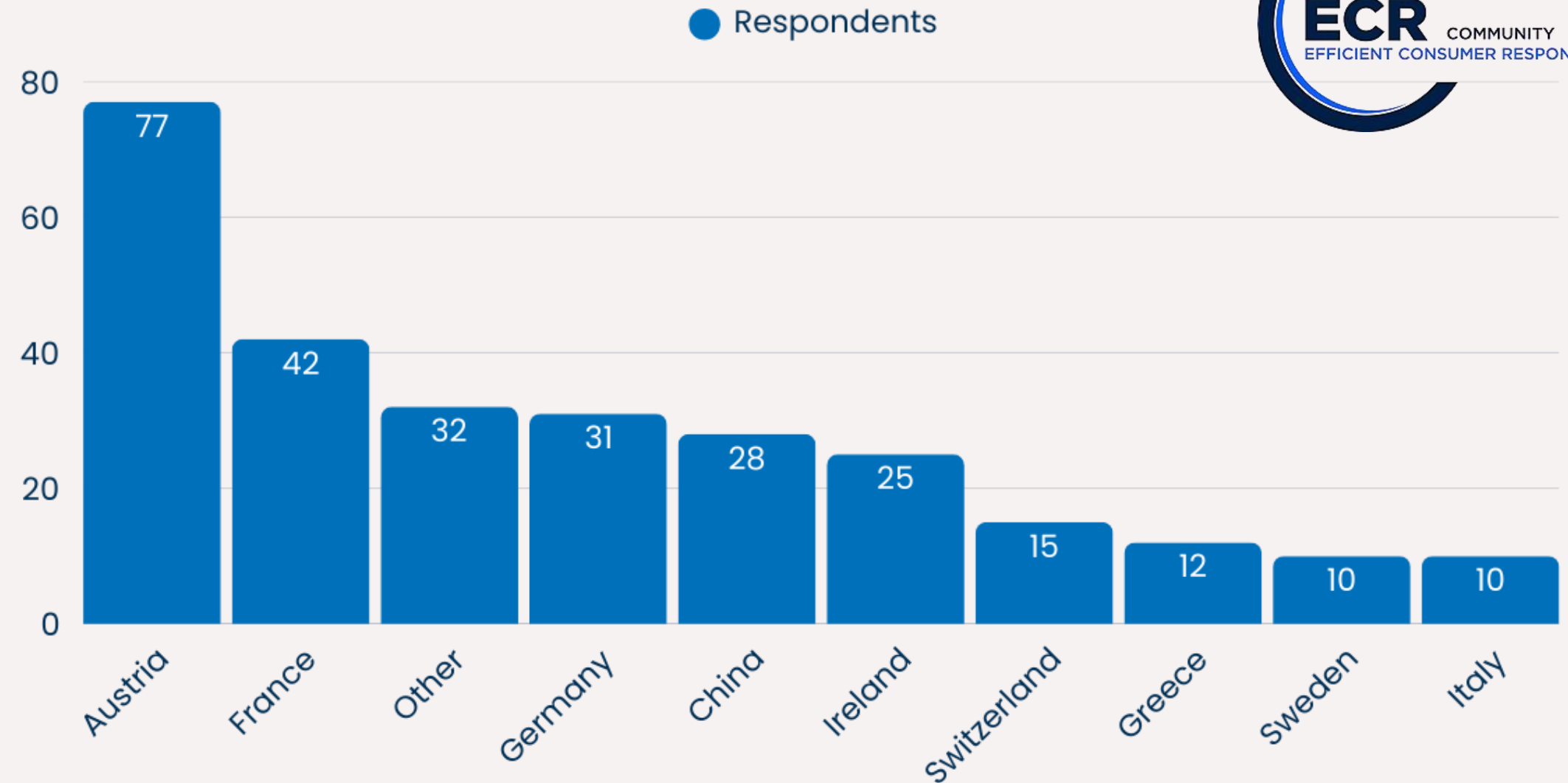
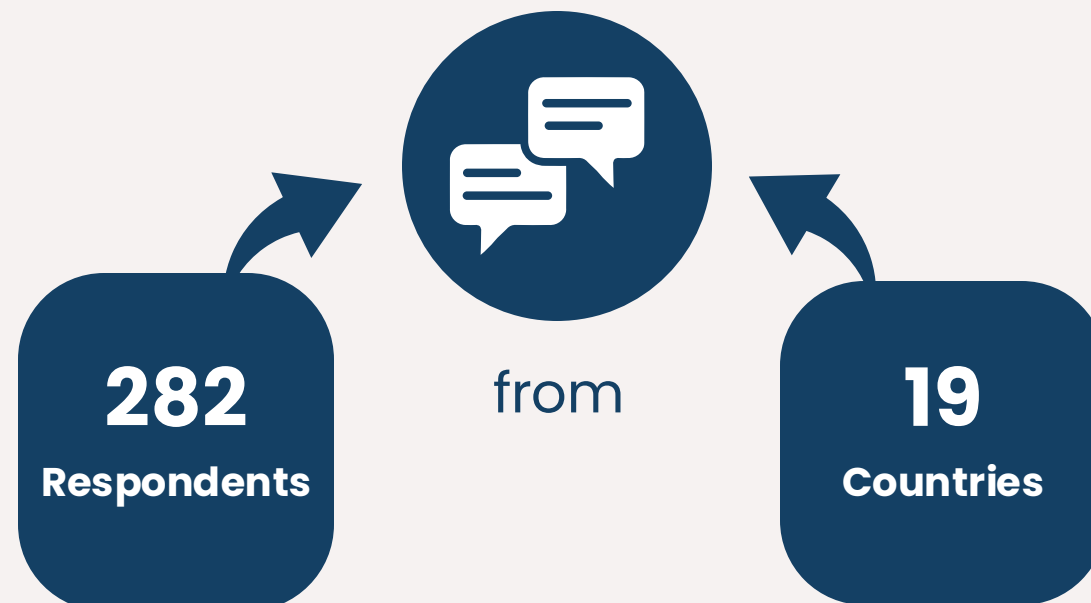
How are the trends compiled?

The ECR Annual Global Trends are derived from a survey completed by 282 executives across 19 countries during January 2025.

The objective is to understand what matters most to companies in the retail & CPG sector throughout the world for the year ahead.

It will reflect the immediate priorities & challenges, identify trends & growth areas and allow for domestic vs. global comparisons.

It should create a simple means for companies to appreciate global Hot Topics and to understand what matters outside their trading jurisdictions, which can assist with their company strategic planning.



Executive Summary

The major findings from the ECR Annual Global Trends 2025 identified common focus areas throughout the world, summarised as follows:

Top Business Priorities

Operational efficiency, supply chain resilience and sustainability.

Consumer Behaviour Shifts

Increased focus on affordability, value and health-conscious choices.

Current Challenges

Inflation, labour shortages and regulatory changes.

New Technologies

Growing role of AI, predictive analytics and automation in business strategy.

Sustainability

Emphasis is on ethical sourcing, packaging solutions and carbon footprint reduction.

It is most apparent that the global marketplace is addressing similar opportunities & challenges albeit with constantly changing shopper behaviour.

The ECR Annual Global Trends addresses each of these focus areas individually.



Top 3 priorities for companies in 2025

Retailers & suppliers rank priorities identically albeit with differing importance.

#1

Improving **operational efficiency**
(ranked higher by retailers)

#2

Managing **supply chain** disruption
(more important for suppliers)

#3

Sustainability initiatives
(matters more for suppliers)



of retailers claim improving operational efficiency is a top priority. Compared to 61% for all respondents.



of suppliers cite managing supply chain disruptions as a top priority compared to 39% of retailers.



of suppliers identify sustainability initiatives as a top priority compared to 38% of retailers.

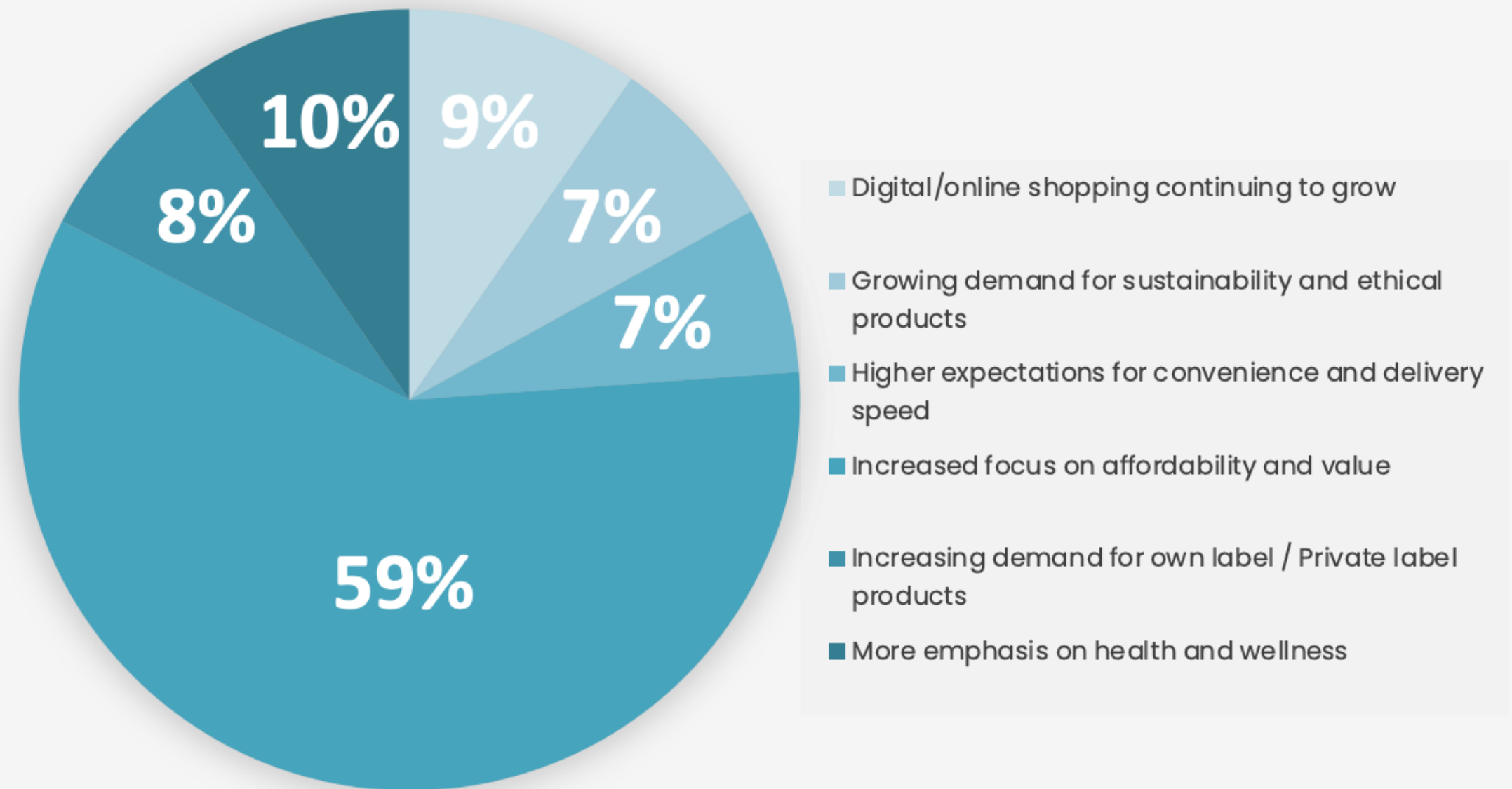
How will consumer behaviour shift in 2025?

59%

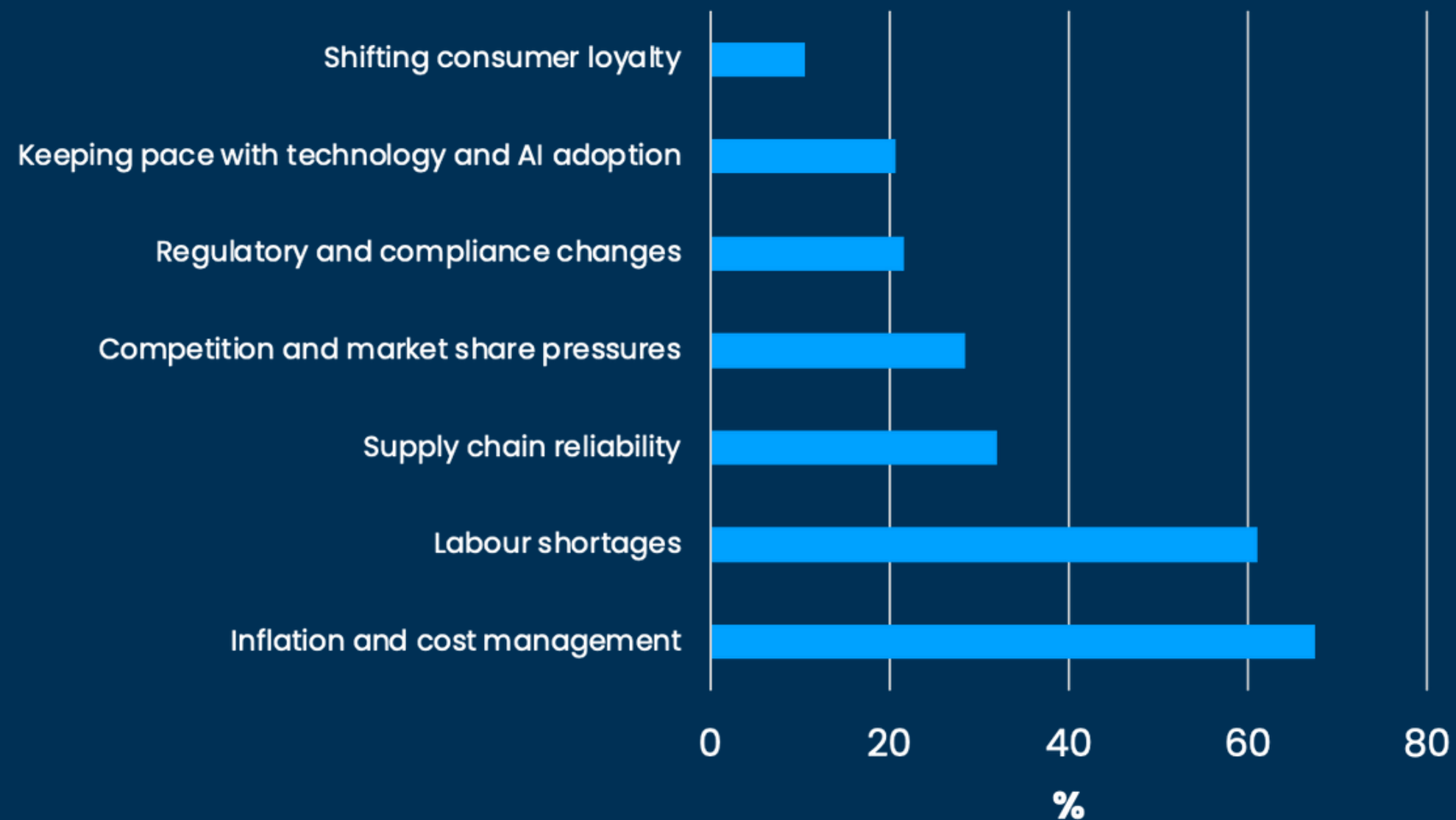
of **retailers & suppliers** overwhelmingly predict the biggest change in consumer behaviour will be an increased focus on affordability & value.

10%

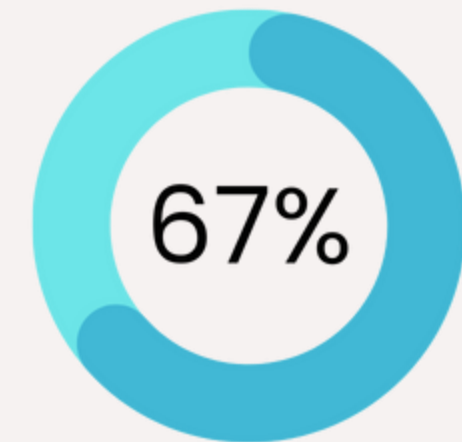
of **retailers & suppliers** estimate more emphasis on health & wellness as being the major consumer shift, a sizable shift!



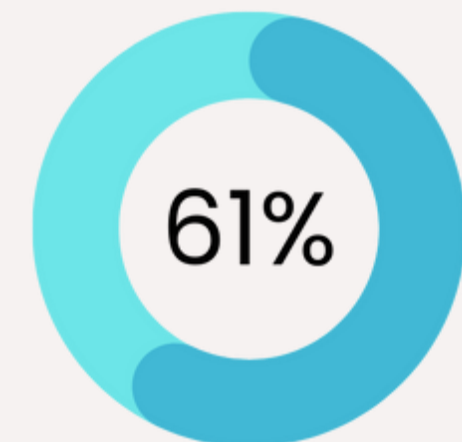
Challenges expected by retailers & suppliers in 2025 (Choose 3)



Despite a changing world of technological innovation and consumer demands, traditional challenges remain to the fore.



select inflation & cost management as a major challenge, although 1/3 do not.



are concerned about labour shortages.

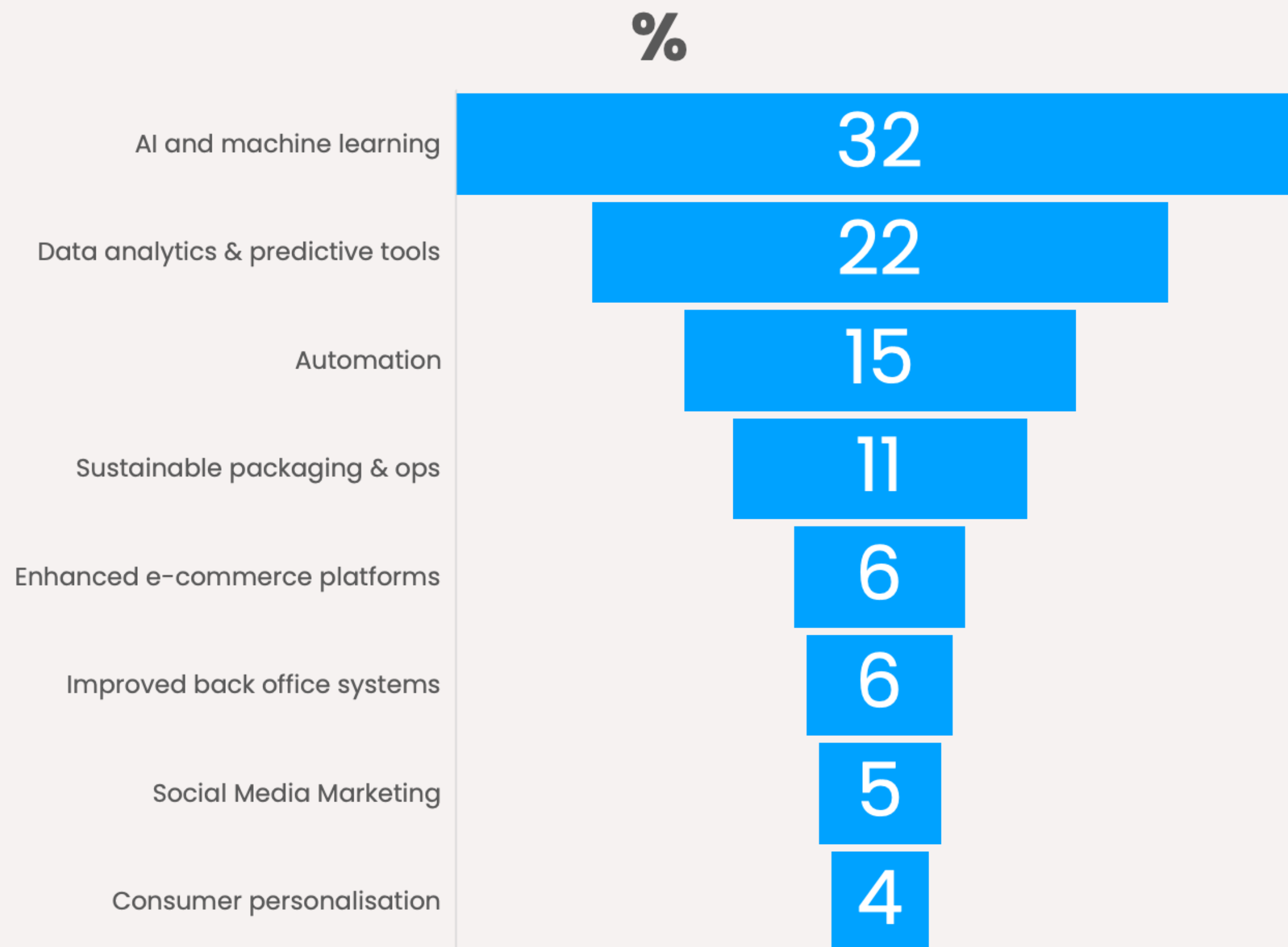
Which technologies & innovations will have the greatest impact in 2025

54%

choose **AI & machine learning** and **data analytics & predictive tools**.

6%

electing **enhanced e-commerce platforms**, suggesting focus will be elsewhere!



*Sustainability
is more a priority for suppliers*

56%

of **suppliers** say that sustainability is a top priority and central to strategy vs. 29% of **retailers**.

95%

of **retailers** state that sustainability is either a top or important priority, compared to 97% of **suppliers**.



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

30%

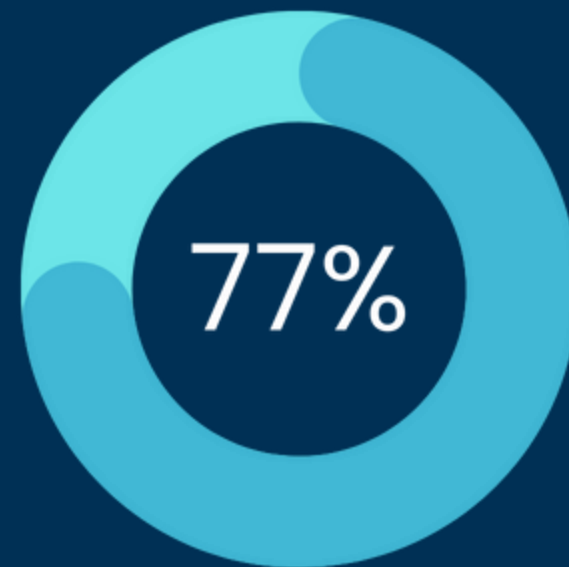
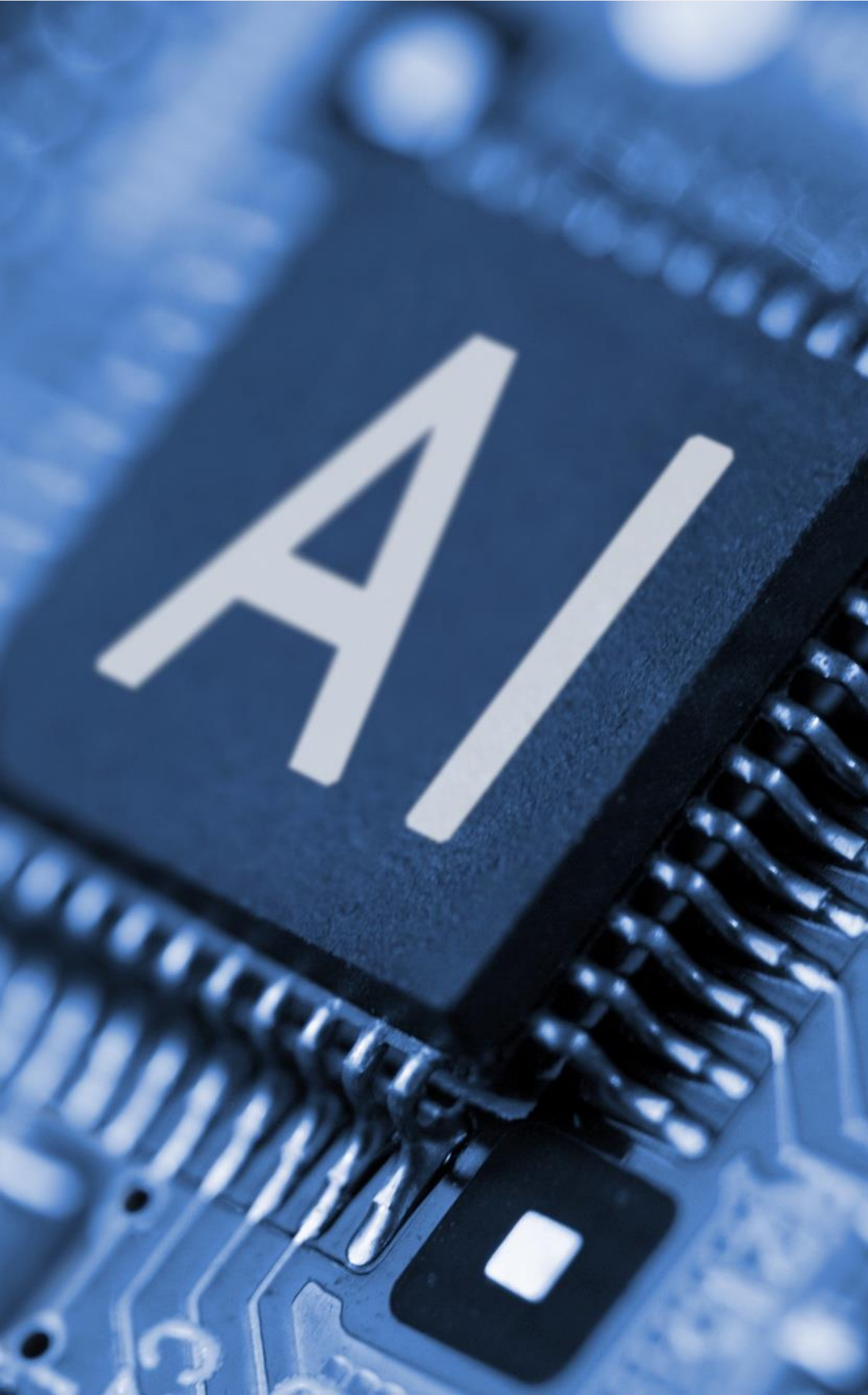
of retailers focus on reducing food & plastic waste most vs. 19% for suppliers & 25% for service providers.

27%

of suppliers cite sustainable packaging solutions as a top focus area, just ahead of lowering carbon emissions in the supply chain (26%).

<8%

of retailers & suppliers identify reporting as a focus, this is bound to change as the EU CSRD takes affect.



of all companies expect **AI** to play an **extensive role** or a **role to some extent** in strategy & operations in 2025.

Where will AI be focused?

1. Marketing & customer experience – #1 area of focus for retailers.
2. Automation & operational efficiency – Suppliers emphasise this as their #1.
3. Supply chain & demand forecasting
4. Decision support & business strategy
5. Data & analytics – #1 for service providers.
6. AI as support & adoption
7. Training & skills development
8. Sustainability & ethical sourcing

*See Appendix 4

Key Trends in Grocery & CPG in 2025

Retailers and suppliers were asked “what is one change or trend that you believe will define the grocery and CPG sector in 2025?”

The most common responses indicated the following;

Economic pressures & pricing

Both retailers and suppliers acknowledge inflation, price sensitivity and economic instability as dominant challenges.

AI & digital innovation

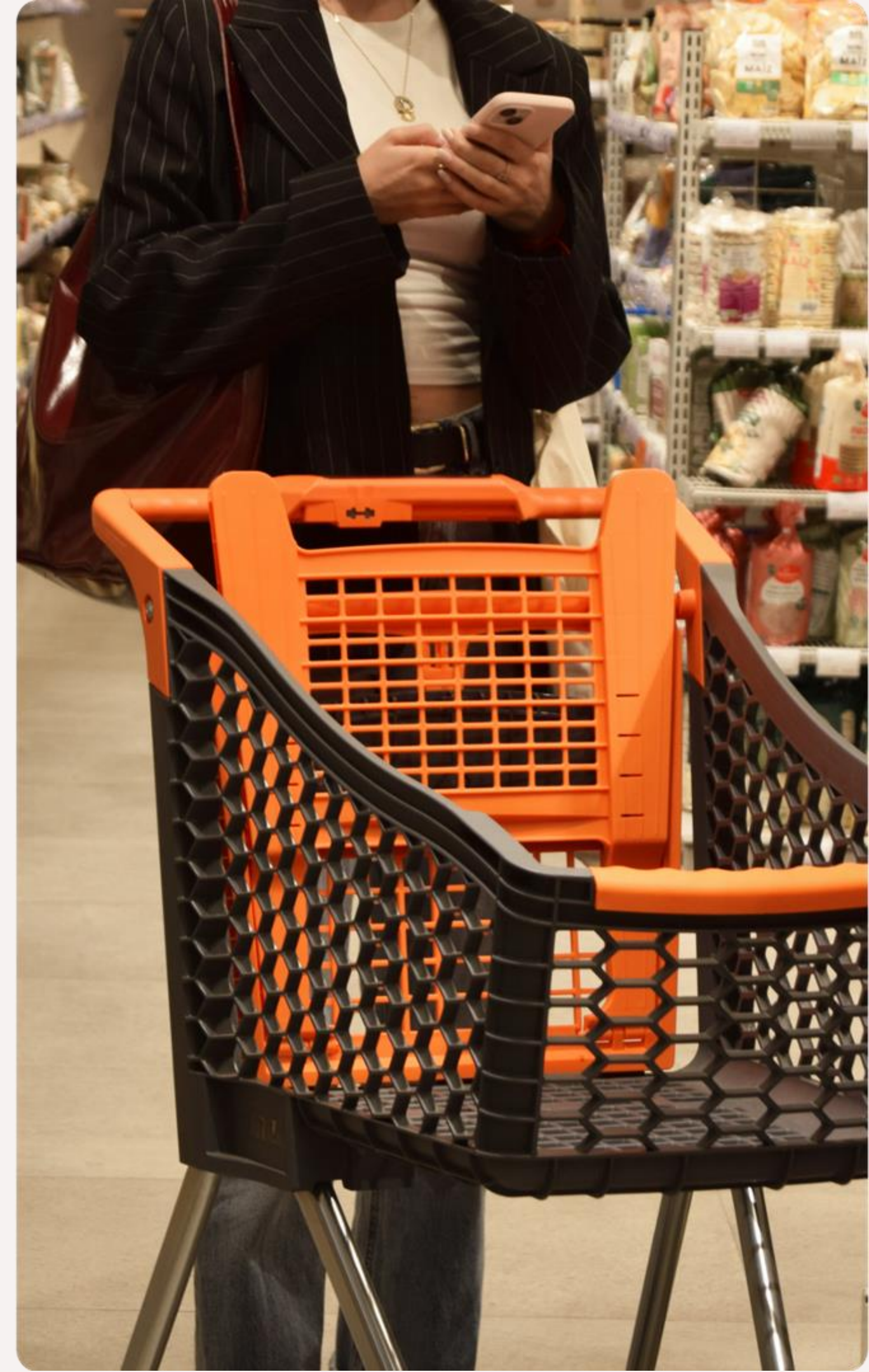
Companies are leveraging automation and AI-driven personalisation to enhance efficiency and customer experiences.

Supply chain challenges

Retailers & suppliers highlight issues with consolidation, private label expansion and supply chain stability as ongoing concerns.

Sustainability

While sustainability is recognised as important by both, suppliers emphasise balancing it with cost efficiency, whereas retailers focus more on compliance and local sourcing.



Key Trends in Grocery & CPG in 2025 (contd.)

Retailer specific

- Consumer behaviour & economic pressures – Retailers emphasise shifting shopping habits, rising inflation and the need for value-driven choices.
- Workforce & operational challenges – Labour shortages, staff retention and in-store conflicts are significant challenges right now.

Supplier specific

- Shifting consumer trends – Suppliers stress indulgent consumption and the rise of private labels as defining shifts.
- Competitive strategy & growth – Suppliers focus on innovation, promotions and product assortment as vital to staying competitive.

Key insight

- Retailers are more focused on consumer behaviour, operational challenges and compliance, while suppliers are more concerned with market positioning, private label growth and balancing sustainability with cost efficiency.



Global Grocery & CPG Trends

Germany & Austria

Focus on sustainability, price competition and AI automation.

France

Emphasising pricing strategies, retail consolidation and digital transformation.

China

Prioritising private-label growth, consumer segmentation and efficiency.

Ireland

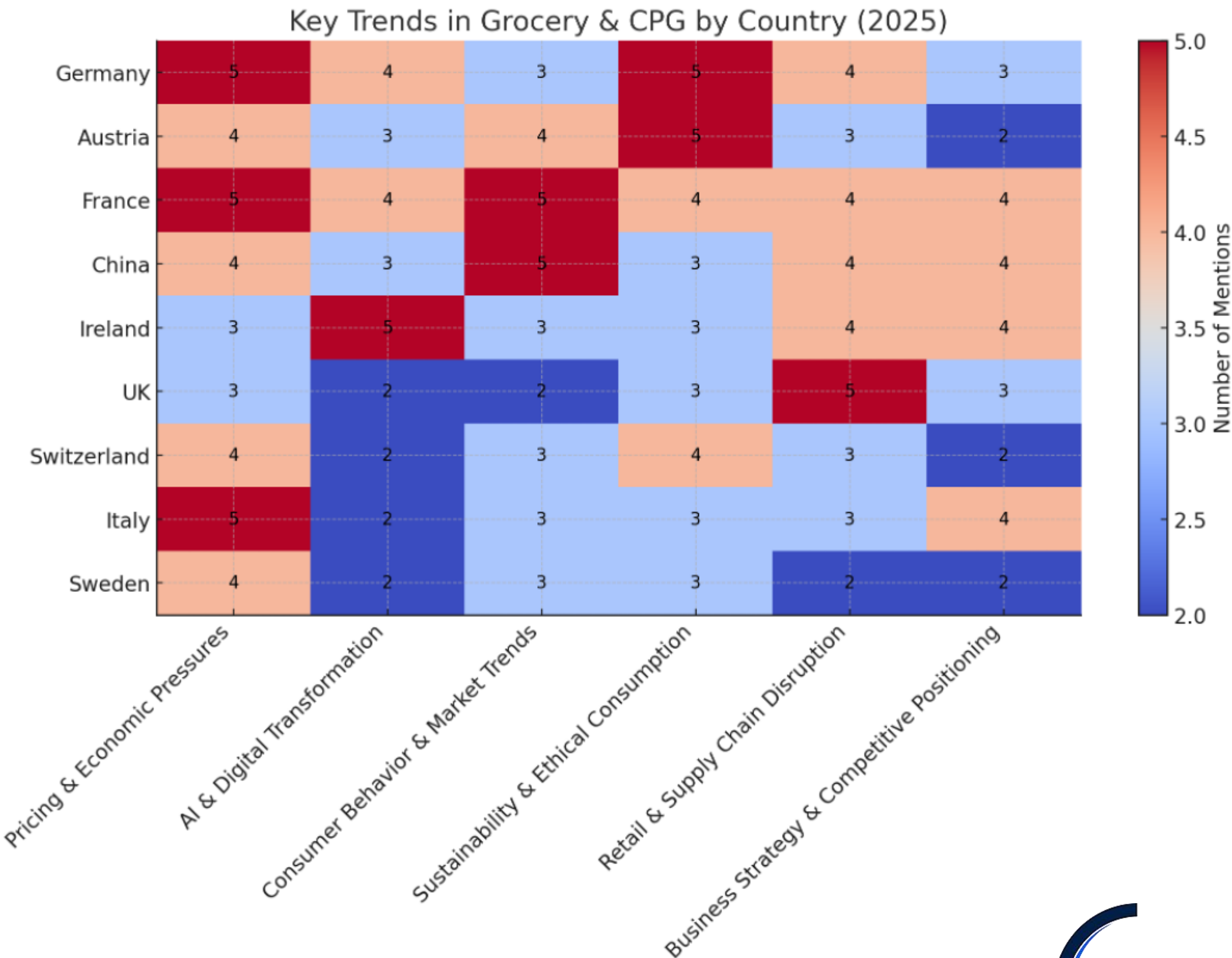
Leading in AI-powered marketing, retail media and compliance.

UK & US

Concerned with supply chain risks and economic stability.

Sweden & Switzerland

Focused on affordability, price sensitivity and economic pressure.



The CEO view

78%

of CEOs identified improving operational efficiency as a top priority, underscoring the focus on streamlining processes and reducing costs.

72%

highlighted digital transformation and automation, signaling a continued push toward technological advancements.



CEO challenges

80%

of CEOs expressed concerns about inflation & cost management making it the most pressing challenge.

62%

identified labour shortages.

58%

pointed to supply chain reliability as a major obstacle.

52%

highlighted regulatory & compliance changes

Conclusion

The ECR Annual Global Trends 2025 show that efficiency, supply chain resilience and sustainability are top priorities for the Retail & CPG sector for the year ahead.

Inflation and labour shortages remain concerns, making collaboration more important than ever.

Many companies are turning to AI, automation and predictive analytics to improve operations and it is estimated that tracking their adoption will be most enlightening in the next few years.

The concept of Efficient Consumer Response encourages “working together” both internally and externally as a critical enabler to achieving consumer satisfaction and this approach is essential in the prevailing market.

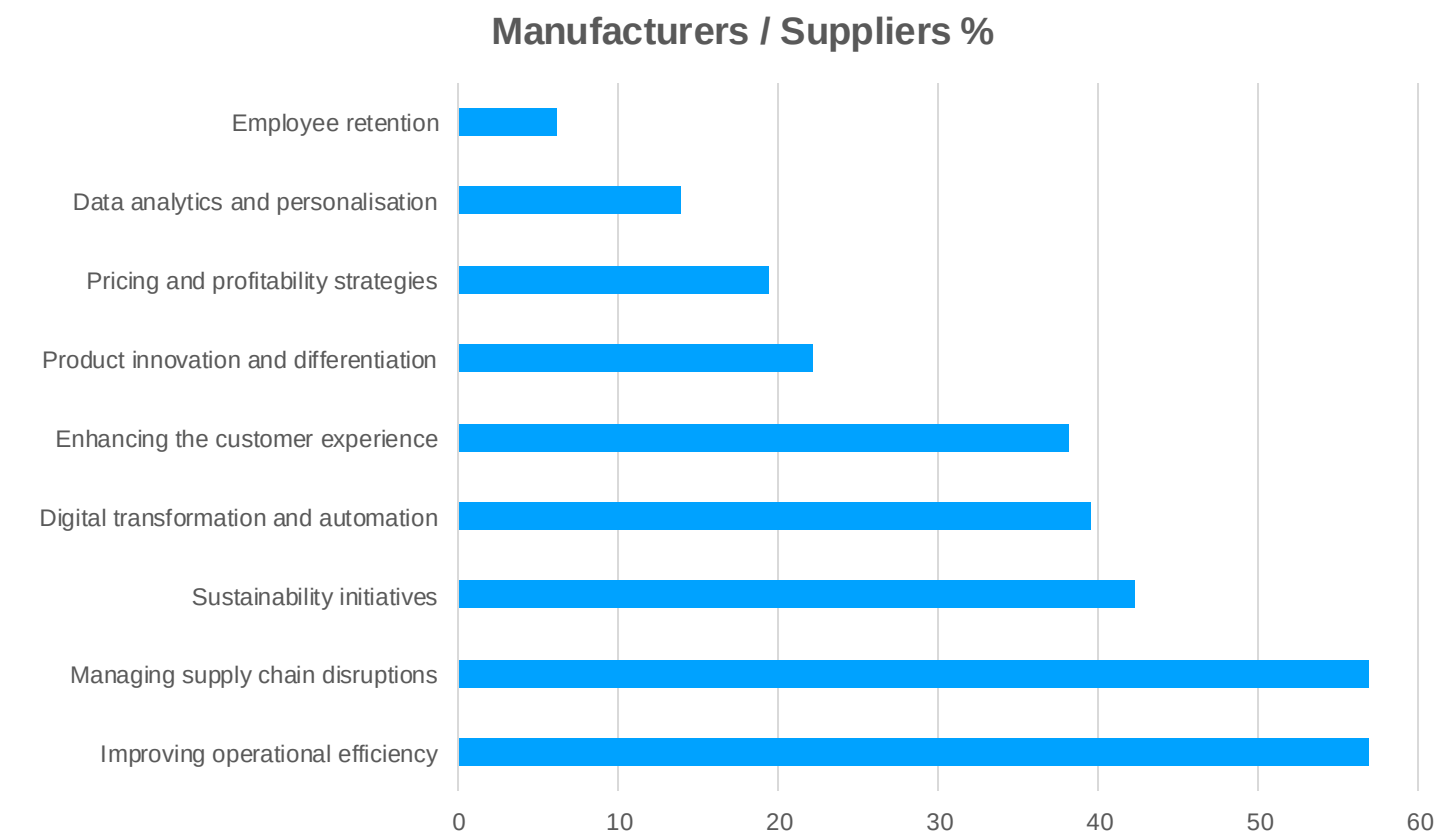
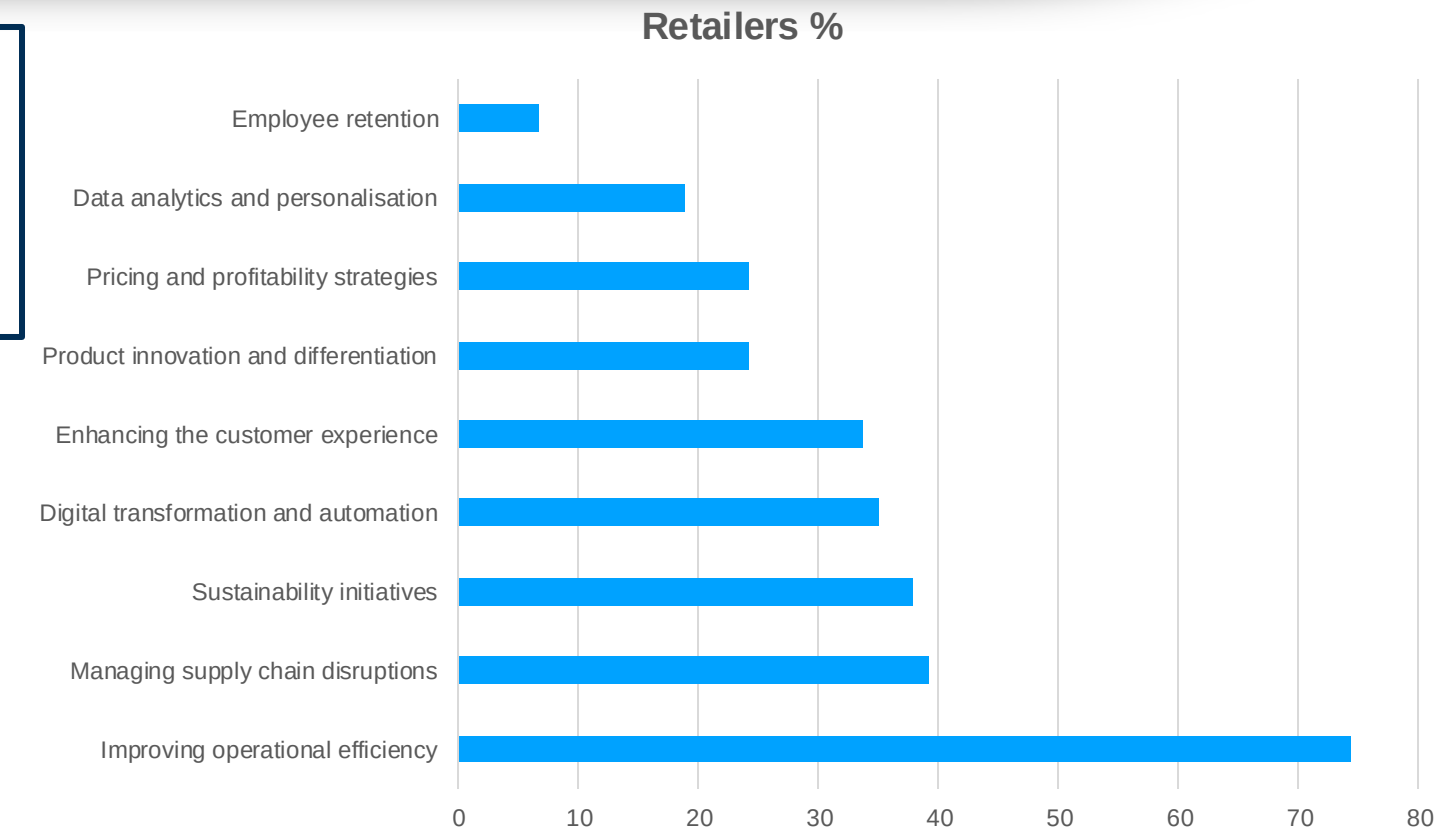
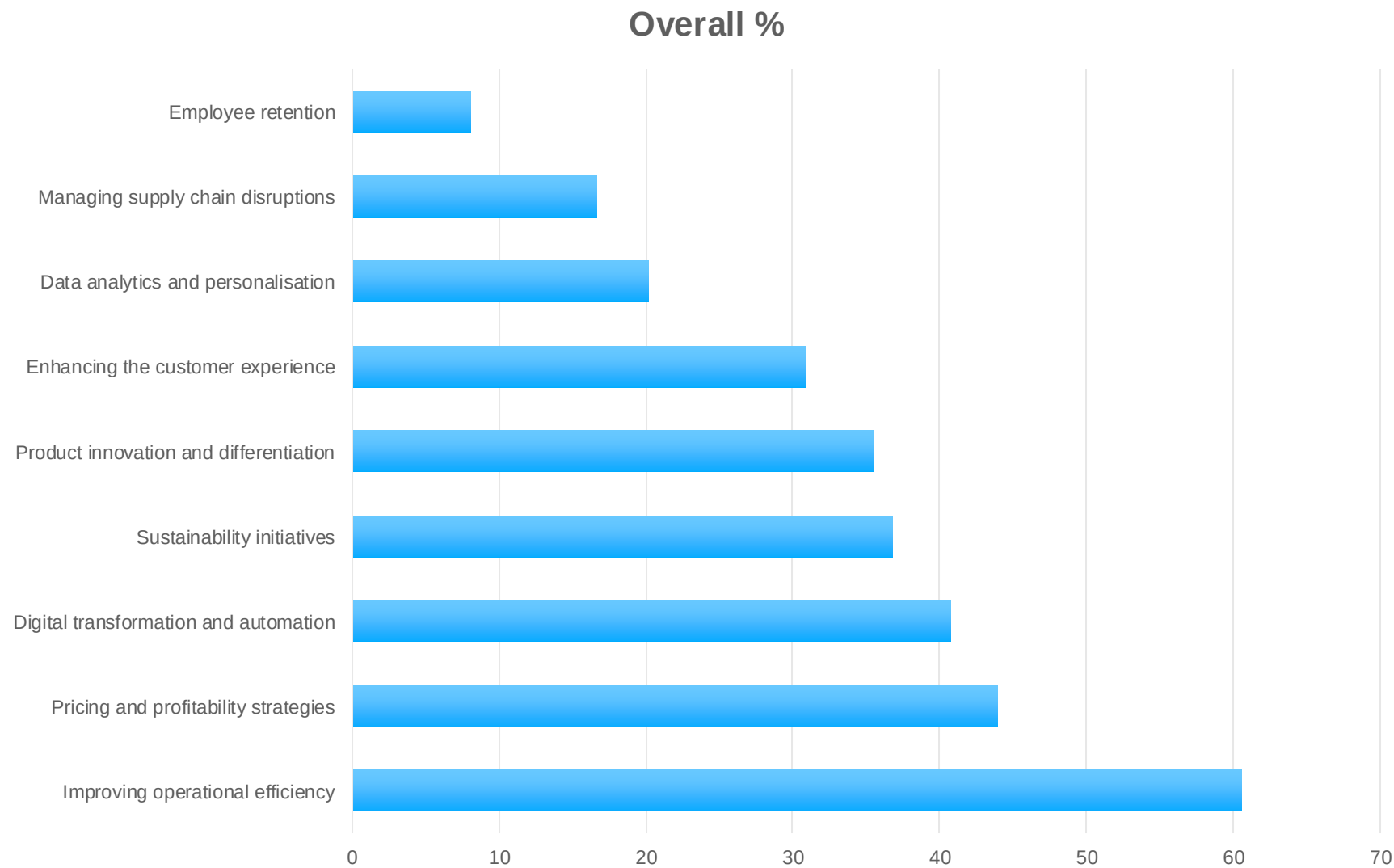
In summary, the ECR mission statement is so relevant for retailers & suppliers today;

“Working together to fulfil consumer wishes better, faster and at less cost, in a sustainable way”.



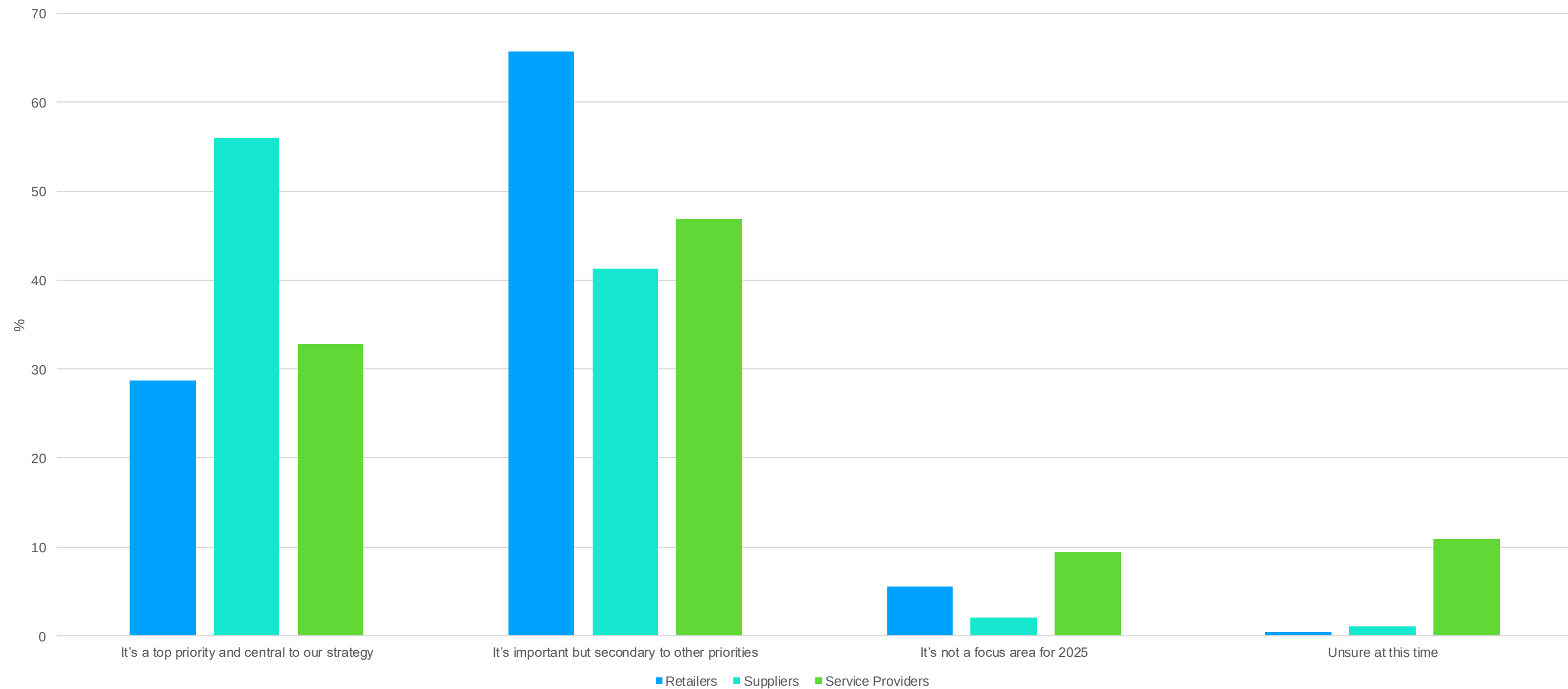
Appendix 1

Q.1 What are your top 3 priorities for your business in 2025? (Select up to 3)



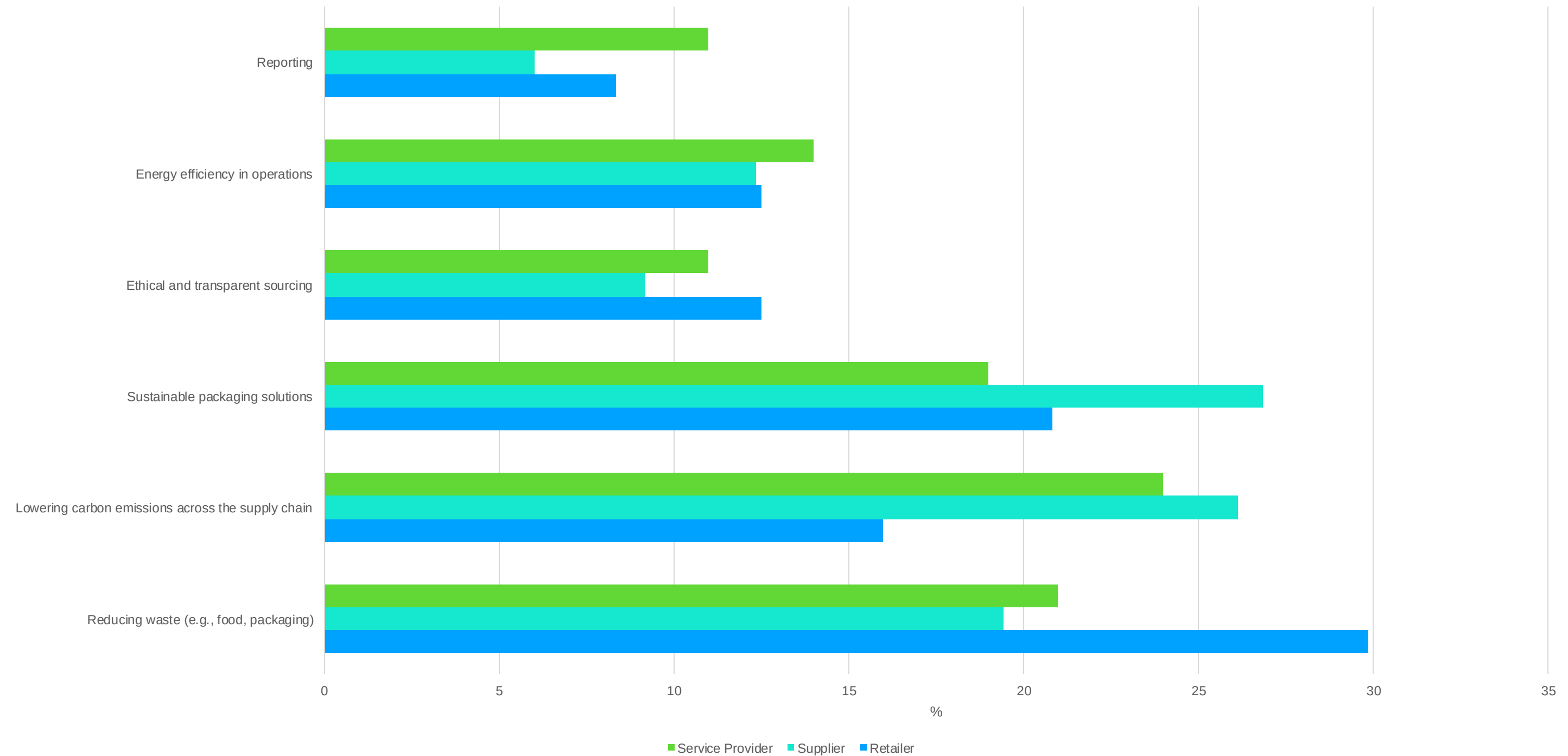
Appendix 2

Q.5 What role will sustainability play in your 2025 strategy?



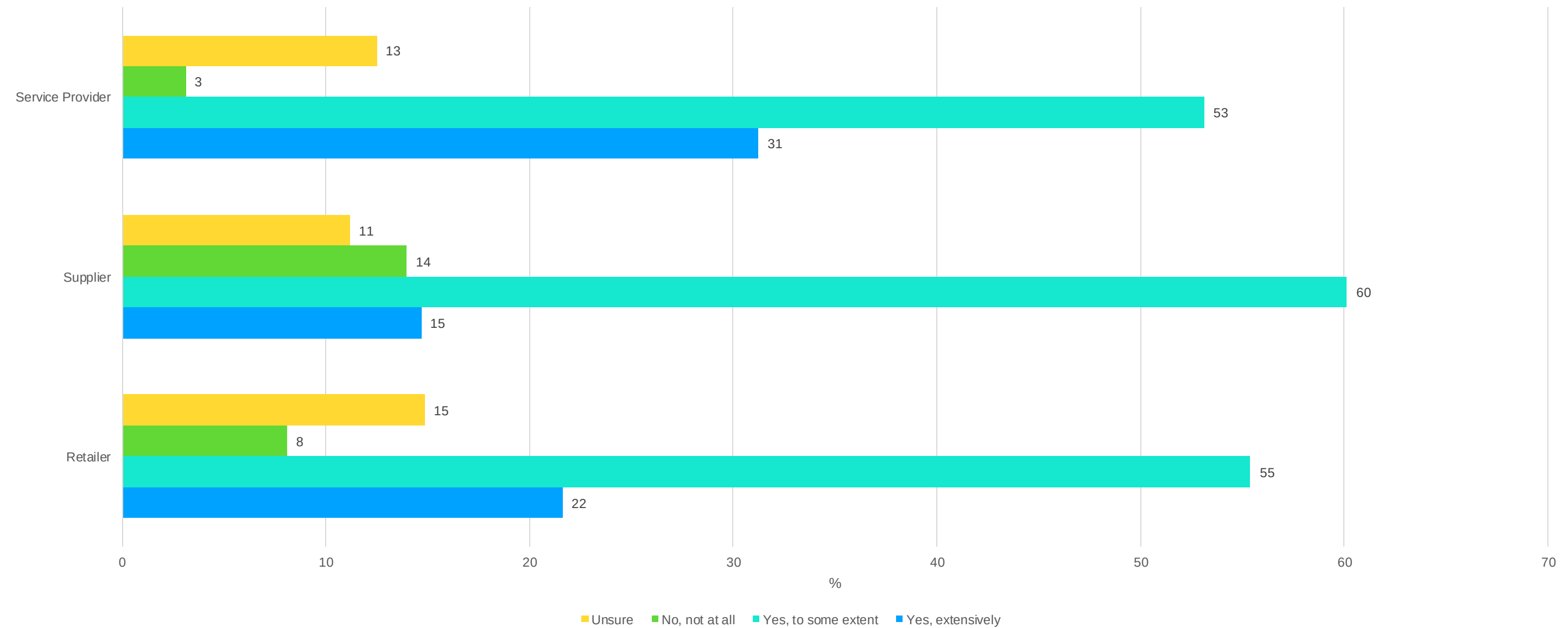
Appendix 3

Q.6 If sustainability is a focus, what areas are you prioritising? (Choose 2)



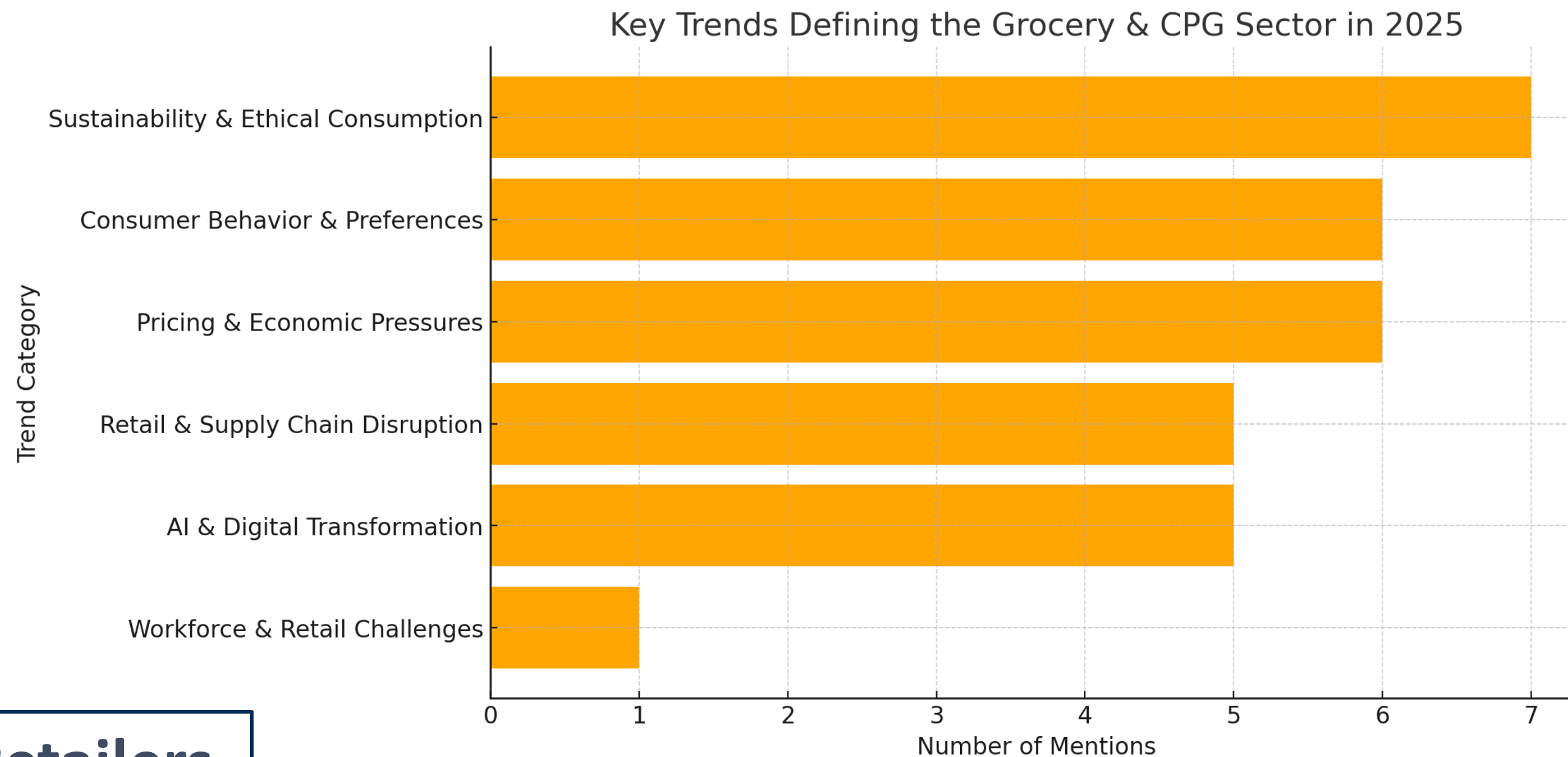
Appendix 4

Q.7 Do you see AI playing a role in your operations or strategies in 2025?



Appendix 5

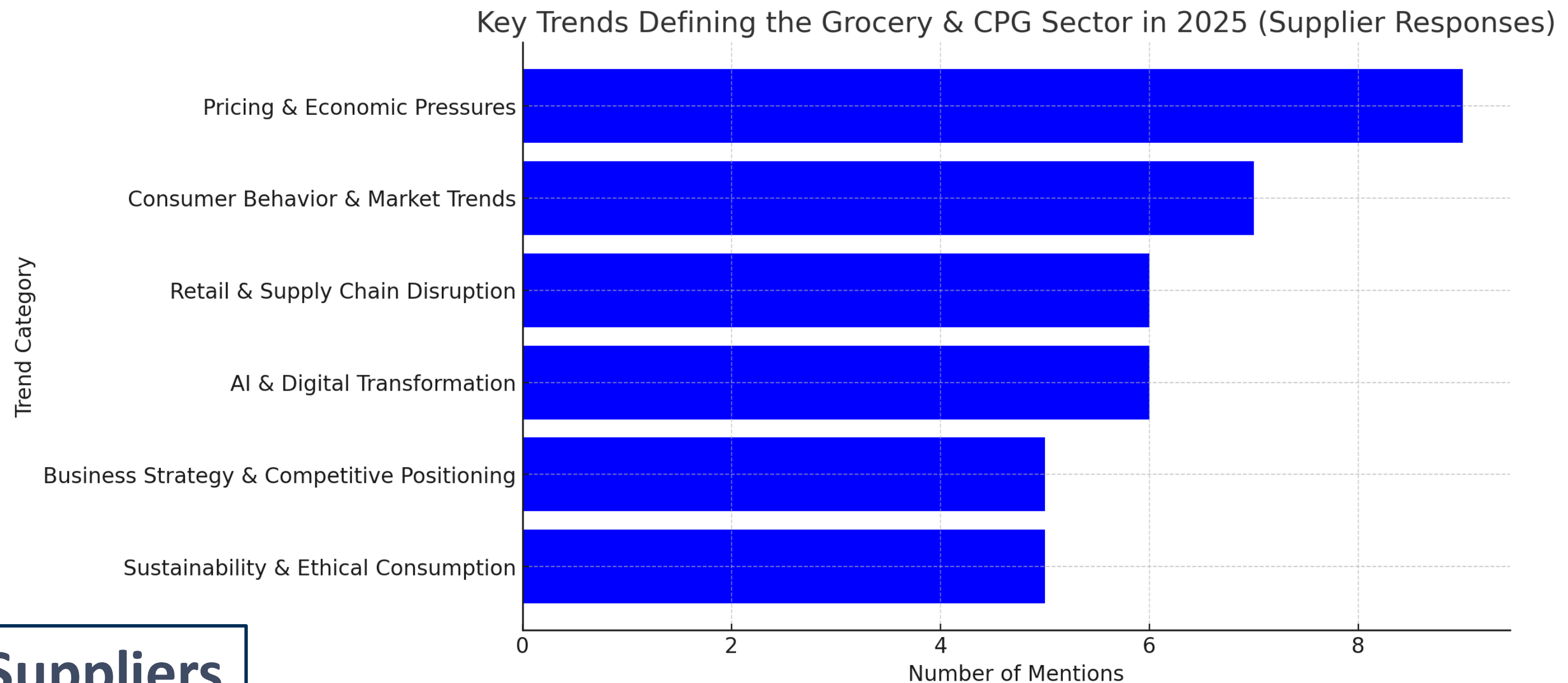
Q.9 What is one change or trend that you believe will define the grocery and CPG sector in 2025?



Retailers

Appendix 6

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Suppliers

Appendix 7

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