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CYBER

NEXT COMMERCE NEWS



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UPSKILLING FOR A CHANGE

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The logo for firstmovr, featuring an orange arrow pointing right followed by the word "firstmovr" in white lowercase letters.The word "CYBER" in large, bold, white uppercase letters. A large, white, stylized outline of the letter "P" is positioned behind the word, extending from the bottom of the "Y" and looping around the right side.

NEXT COMMERCE NEWS

Mission:

***To cut through
the market noise
to surface the
commerce signals
that matter most!***

Walmart Holds Prices as Sparky Lifts Conversion



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STORY SUMMARY

Walmart CEO John Furnier said Walmart will not personalize grocery prices by shopper, by time of day, or based on what a shopper tells Sparky, its AI shopping assistant (Retail Dive, Sept. 28). A Food Navigator report from Sept. 21 says Sparky visual shopping converts 57% higher than text search, and average order value is about 40% higher.

C

WHAT IT MEANS FOR CPGs

If not already, Digital Commerce and Sales should be working closely with their Legal and RGM teams on the personalized prices topic across all retailers. Even if not directly participating with Retailers on personalized pricing, benchmark surveys on pricing with 3rd parties could be a factor you need to be aware of.

SOURCE

Brands Feed Alexa as Amazon Pushes Longer Attribution



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STORY SUMMARY

Amazon Ads announced Branded Conversations, which lets brands feed product expertise into Alexa for Shopping so the assistant can use that expertise in shopping chats. US launch is January 2027. Digiday (Oct. 1) reports Amazon says about 20% of brand sales value lands after the standard attribution window, and Amazon wants to own longer-window measurement.

C

WHAT IT MEANS FOR CPGs

Branded Conversations create an execution challenge: decide whether to participate, who owns the brief, where funding comes from, and how approvals work across teams. The bigger issue might be content governance. For example, keeping briefs, PDPs, FAQs, claims, and consumer feedback aligned while using Amazon's reporting to make faster updates without letting paid media crowd out organic content investment.

SOURCE

Costco Gained \$2.5 Billion in CPG Wallet Share



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STORY SUMMARY

Numerator data reported by Chain Store Age on Sept. 28 shows Costco took about \$2.5 billion in CPG wallet share, and new members are fueling the gain. More than \$1 billion of that came from Walmart, Kroger, and Albertsons, according to the report. Branded CPG sales at Costco grew about 3 times faster than Kirkland private label, Costco's own brand.

C

WHAT IT MEANS FOR CPGs

A related data set from US Census Bureau indicated that 5 Retailers took 45.5% of growth in 2025 which included Costco, Amazon, Walmart, TikTok Shop, and Sam's Club. Whether you put more stock in one of these reports or both, how fast is your RGM team adjusting to where the growth is coming from as well as your product innovation team.

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Gopuff Joins Instacart for 15-Minute Delivery



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STORY SUMMARY

Gopuff is joining the Instacart Marketplace, according to an Instacart press release dated Sept. 22. The fulfillment target is 15 minutes or less, delivered through Gopuff micro-fulfillment. Instacart Carrot Ads will run on the Gopuff storefront, so brands can advertise inside the Gopuff shopping experience. Instacart calls it a first-of-its-kind U.S. partnership.

C

WHAT IT MEANS FOR CPGs

How will your internal teams align if Gopuff and Instacart have been separate in the past? Also, monitor how consumers decide between an Instacart offering that could be faster now vs DoorDash or Uber Eats. With budget season underway, will this mean more Retail Media funding for Instacart/Gopuff than you originally forecasted?

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Ahold Uses AI Agents in Retail Media, Builds Screens



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STORY SUMMARY

At GroceryShop (Grocery Dive, Oct. 1), Bobby Watts of Ahold Delhaize USA Retail Media, covering Food Lion, Giant, Hannaford, and Stop & Shop, said the team uses AI agents for keyword mining and agentic planning in its Edge retail-media platform. It is also rolling out self-built in-store digital screens rather than only buying a vendor network.

C

WHAT IT MEANS FOR CPGs

Expect retailer-side AI to shape how your keywords and campaigns get planned. Get your data quality and creative inputs organized so agents can work from them. Combine this story with another Groceryshop session that gained popularity regarding Lu from Magalu which is the world's largest virtual influencer, created by the Brazilian retail giant Magazine Luiza. Also read Andrew Lipsman's Grocery is the new TV article.

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Change is hard. Let's change that!



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