Institut du COMMERCE
PARTAGE & PROSPECTIVE

WHITE PAPER

AI & Sustainable Category Management

Two transformations, one shared bottleneck

What the ECR community thinks about artificial intelligence and sustainability

> **ECR Community survey** · 62 respondents · February–March 2026
>
> Survey conducted by ACTINCO for Institut du Commerce, GS1 Switzerland and ECR Italy

Institut du Commerce edition — 2026

Contents

Methodology and objectives
In brief — the three signals to remember
Part 1 · AI in category management
1. AI, an accelerator, not a transformer
2. The bottleneck is not technological
3. The market wants proof, not concepts
Part 2 · Sustainable category management
4. Sustainability, an offensive lever
5. The ‘32 versus 3’ gap
Part 3 · CSR maturity and national signatures
6. Knowing how to measure, govern, transform
7. Four national signatures
In summary

Methodology

62 complete responses · Period: February–March 2026

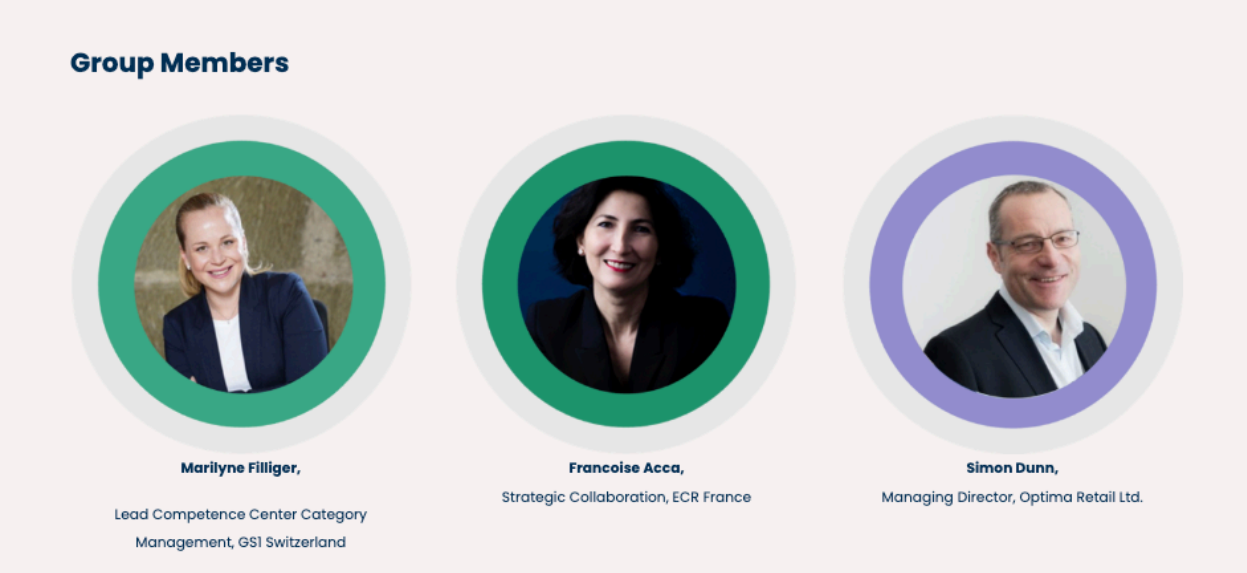
Profile: 61% manufacturers (38 brands) · 18% retailers (11 banners), - Category Managers – Sales, Insights

Geography: France 19 · Global 14 · Italy 11 · Switzerland 9 · United Kingdom 1 (excluded from country comparisons, insufficient base)

Survey conducted by ACTINCO for Institut du Commerce, GS1 Switzerland and ECR Italy.

The study has a twofold objective.

The initial objective was to survey Category Managers in different countries to understand their knowledge and expectations regarding a webinar organised **by the ECR Community subgroup 'role of AI in Category Management**' of which Francoise Acca, Marilyne Filliger and Simon Dunn are members. This webinar took place in March 2026 and the replay is available on the ECR Community website https://www.ecrcatmannetwork.com/the-role-of-ai-in-cm-group/.



The second objective concerns the transformation of consumption through category management. The ECR **Sustainability** committee, in which Emilie Chalvignac and Francoise Acca took part for France, and Carolina Gomez and Antonella Altavilla for Italy, sought to assess the maturity level of sustainable category management and the expectations of the different countries.

It seemed essential to us to investigate these two transformations: AI and Sustainability.

Note. This is a study conducted in February 2026; the results will certainly differ within a year on these fast-evolving topics. The number of participants makes it possible to identify macro trends.

In brief — the three signals to remember

01 AI is perceived as a productivity gain, not as a transformation.

The top four opportunities cited are all time savings. Rethinking the profession is not yet on the agenda.

02 The great collaboration gap: 32 versus 3.

Retailer-supplier collaboration ranks #1 on sustainability and last on AI.

03 One shared foundation — data — blocks both transformations.

Non-harmonised data: 27 mentions on AI, 20 on sustainability. A single workstream to launch.

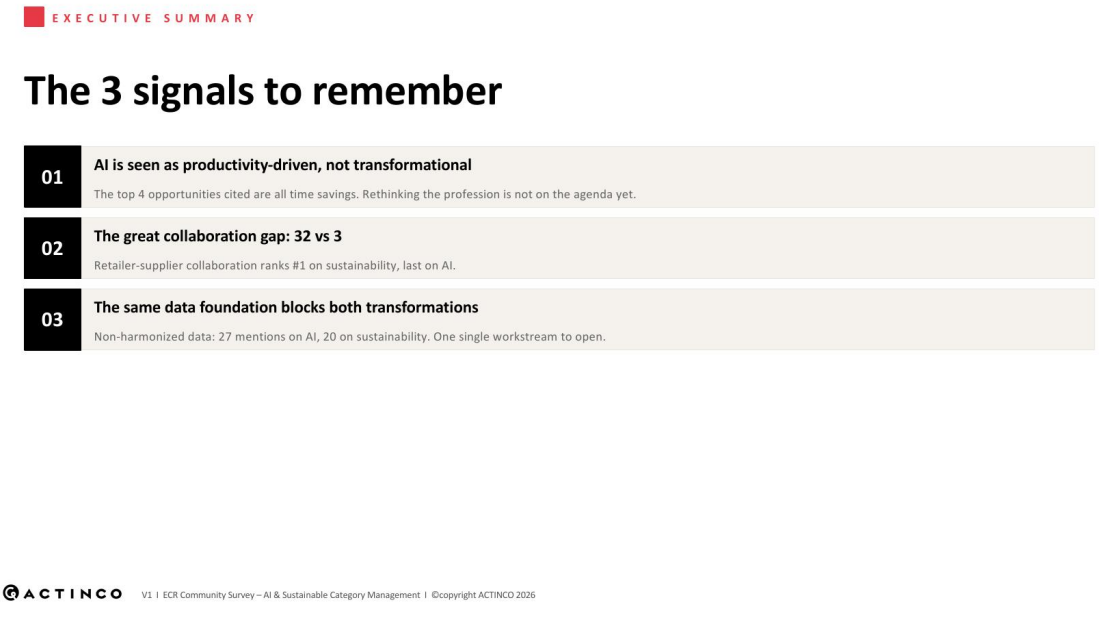


Figure 2 — Executive summary — the three signals. Source: ACTINCO survey, ECR Community 2026.

Part 1 · AI in category management

1. AI is perceived as an accelerator, not a transformer

When asked about the biggest opportunities of AI in category management, respondents place at the top a trio entirely focused on productivity: faster and deeper insights (44 mentions out of 62), better forecasting (41) and reduced manual work (34), followed by reporting automation (33) and time freed up for strategy (31). Nearly 70% of respondents see AI as a way to go faster on existing tasks.

The stated 12-month priorities confirm this utilitarian framing. A French respondent sums up the dominant expectation: *"help human to go fast for manual tasks / help to analyse datas faster — competitors, promo, pricing reporting"*. Another aims to *"Improve AI usage in the Cat Man tasks to decrease manual works"*, a third limits themselves to *"Automatization, efficiency"*. AI is instrumentalised as a time saving.

The contrast is striking at the bottom of the ranking: retailer-supplier collaboration gathers only 3 mentions, around 5% of the sample. Rethinking the profession itself is not yet on the agenda — only a few voices venture there, like this respondent who wishes to *"Understand what the role of the category manager of tomorrow will look like"*, or this retailer who envisions *"the transformation of our business processes using AI tools"* for more shopper-centric planograms. These are exceptions.

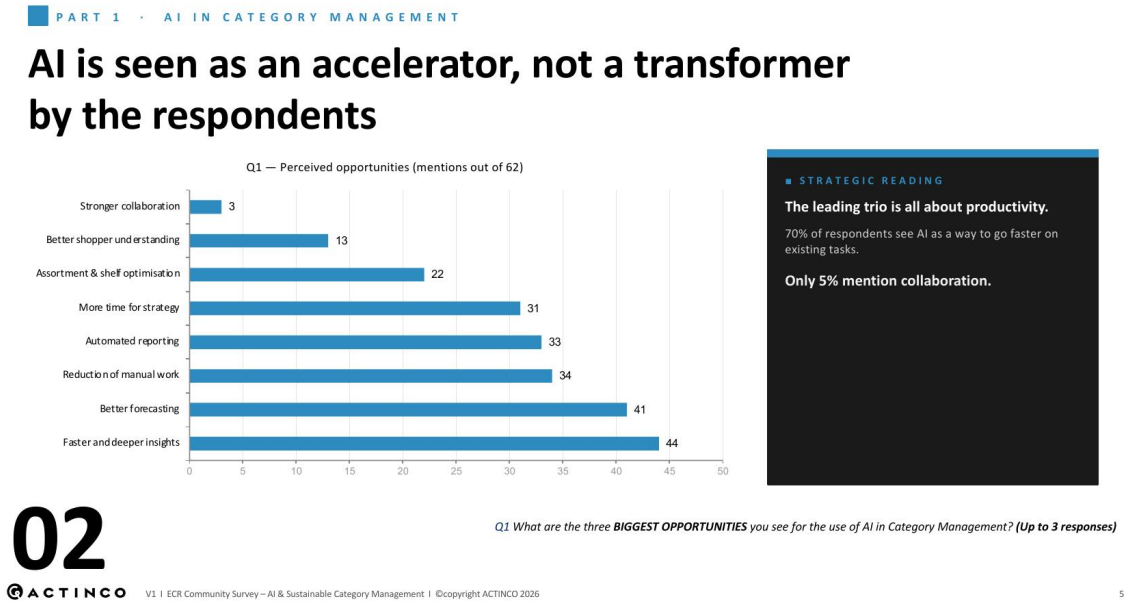


Figure 3 — Perceived AI opportunities (Q1). Source: ACTINCO survey, ECR Community 2026.

2. The bottleneck is not technological

The main obstacle relates first to data: data quality (28 mentions) and lack of harmonisation (27) dominate, ahead of the AI skills gap (20) and an unreadable vendor landscape (20). The demand for foundations is explicit — a Swiss retailer sets their priority as follows: *"Harmonize and centralize data so it can be used for AI purposes"*, while a French manufacturer sums up their daily pain: *"I need that AI manages difficult table with different source of datas"*.

But the most structural bottleneck is legal and contractual. 17 respondents identify data licences as a major barrier: panel providers' contracts (EPOS, KAD) prohibit ingesting this data into AI tools. Added to this constraint is the rarely publicly raised question of the neutrality of recommendations. A Swiss manufacturer phrases it precisely: *"if an AI model is trained and used by a manufacturer to perform Portfolio and Shelf recommendations, how can the Retailer be sure it's legally compliant and the recommendations are neutral […] And the other way round, how can a brand prove it's neutral when using AI algorithms that might be biased or hallucinating?"*. Reliability and copyright recur in the same terms elsewhere — *"How to trust AI results?"* (Italy), *"diritti d'autore ed affidabilità dei dati"* (copyright and data reliability, Italy). AI in category management is as much a matter of governance and compliance as of technology.

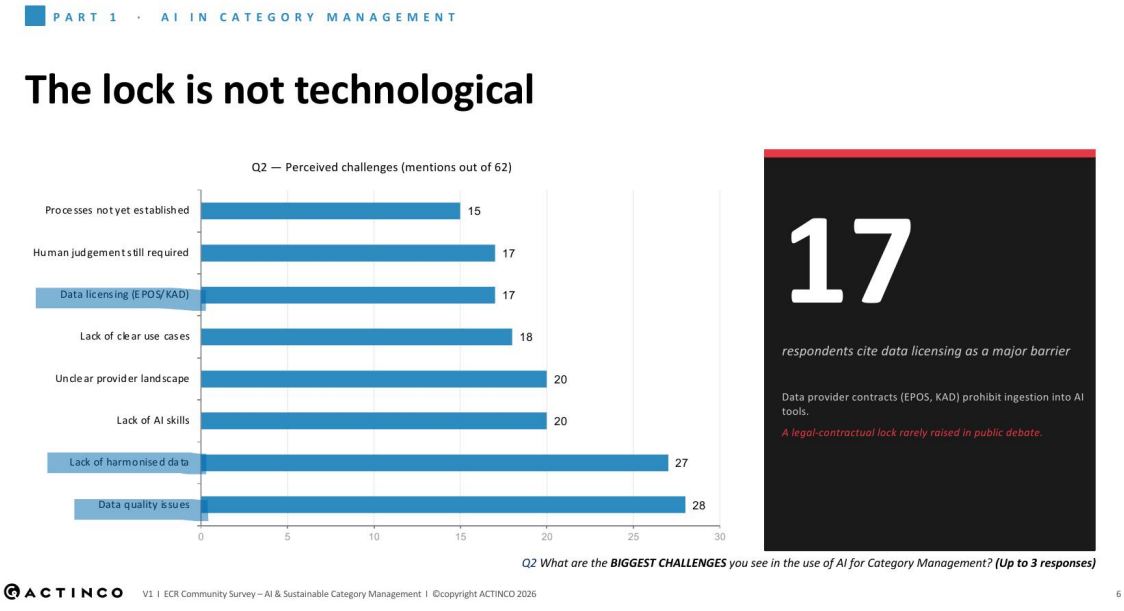


Figure 4 — Perceived AI challenges (Q2). Source: ACTINCO survey, ECR Community 2026.

3. The market wants proof, not concepts

On the expectations side, the demand is unambiguous: respondents call above all for concrete use cases (50 mentions as support expected from ECR, far ahead of training at 34), and this is also the #1 topic wanted for future webinars ("the role of AI in the CM process", 36 mentions). In open-ended responses, concrete use cases represent nearly 40% of mentions.

The verbatims on what is expected from the webinar drive the point home: *"CONCRETE business cases & solutions"* (France), *"Examples of clear and concrete Use Cases in FMCG for SME incl. Roadmap/Milestones on how to proceed — not only addressing Gen AI, but also Predictive or Causal AI"* (Switzerland), *"What are simple use cases that can be covered with little to no effort"* (Swiss retailer), or a progressive approach — *"Recommendations for Crawl / Walk / Run approach"*. The need for upskilling is just as clear, from an *"improve personal ai skill"* (Italian) to the *"competence acquisition of our internal AI tool"* of a French manufacturer.

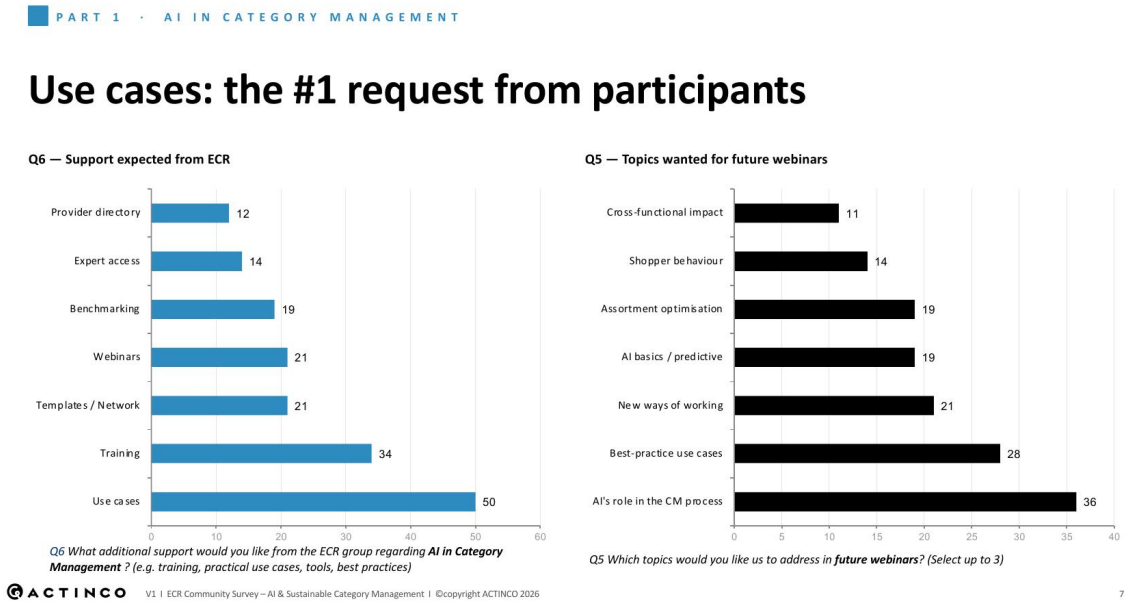


Figure 5 — Support expected from ECR and webinar topics (Q5–Q6). Source: ACTINCO survey, ECR Community 2026.



Figure 6 — Open-ended expectations around AI (Q4, 33 responses). Source: ACTINCO survey, ECR Community 2026.

Part 2 · Sustainable category management

4. Sustainability, by contrast, is seen as an offensive lever

Far from being perceived as a constraint, sustainability is read as a growth lever. The top four opportunities cited are all business levers: retailer-supplier collaboration comes first (32 mentions), followed by new business opportunities, revenue growth through sustainable ranges and innovation / eco-design (30 each), then shopper experience and brand credibility (28 each). Some respondents are already pushing towards the frontier of the topic, like this Italian manufacturer who wants to *"address sustainability along the supply chain: e.g. carbon farming, nature credits"*.

The obstacles are human and governance-related far more than a matter of conviction. Resistance to change dominates (23 mentions), ahead of insufficient data sharing (22) and the absence of standardised sustainability data (20). But the real blocking point is read in the sum of two items: 18 mentions for the **misalignment of commercial KPIs and 17 for the lack of time and resources.** Category managers know what to do; it is their performance targets and their bandwidth that prevent them. This is a problem of governance and incentives, not of will.

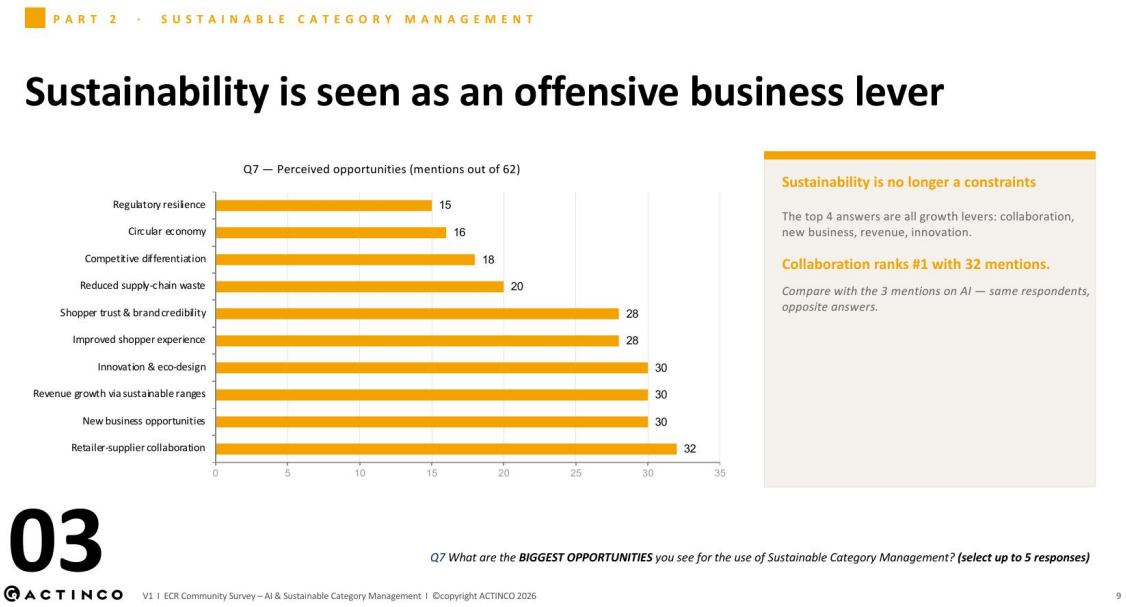


Figure 7 — Perceived sustainability opportunities (Q7). Source: ACTINCO survey, ECR Community 2026.

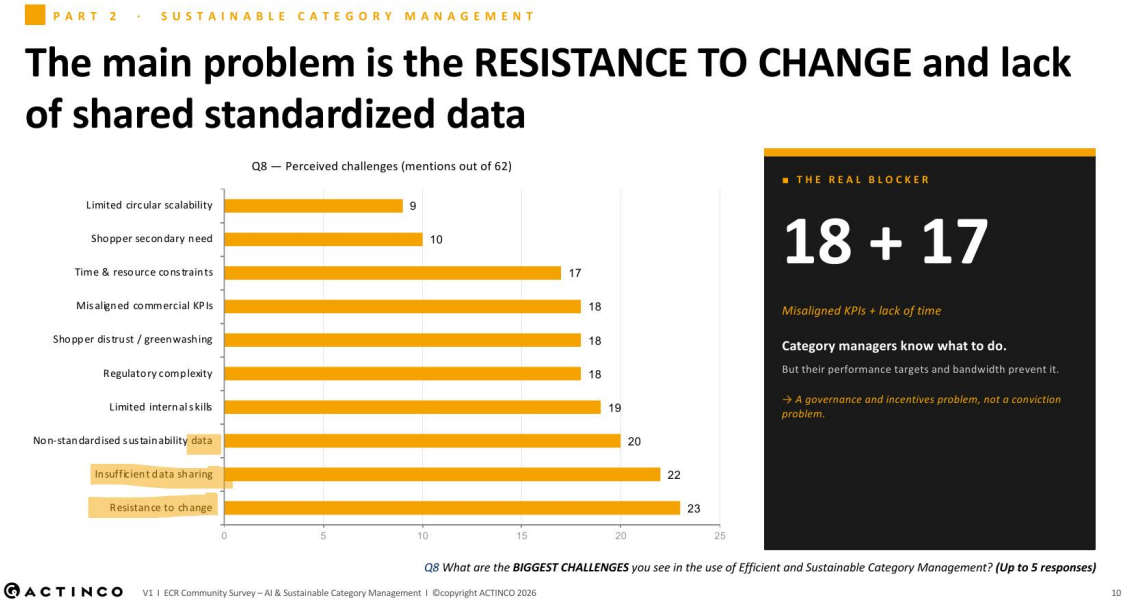


Figure 8 — Perceived sustainability challenges (Q8). Source: ACTINCO survey, ECR Community 2026.

5. The '32 versus 3' gap on collaboration

The central signal of the survey lies in two figures. **The same respondents rank retailer-supplier collaboration first on sustainability (32 mentions) and last on AI (3 mentions).** Two transformations are under way, perceived in diametrically opposed ways on the same issue. The strategic space is clear: "AI in the service of shared sustainability objectives" is still unoccupied territory. And a junction point makes it operational: non-harmonised data blocks both transformations (27 mentions on AI, 20 on sustainability). A single foundational workstream — the governance of shared, standardised data — conditions both agendas.

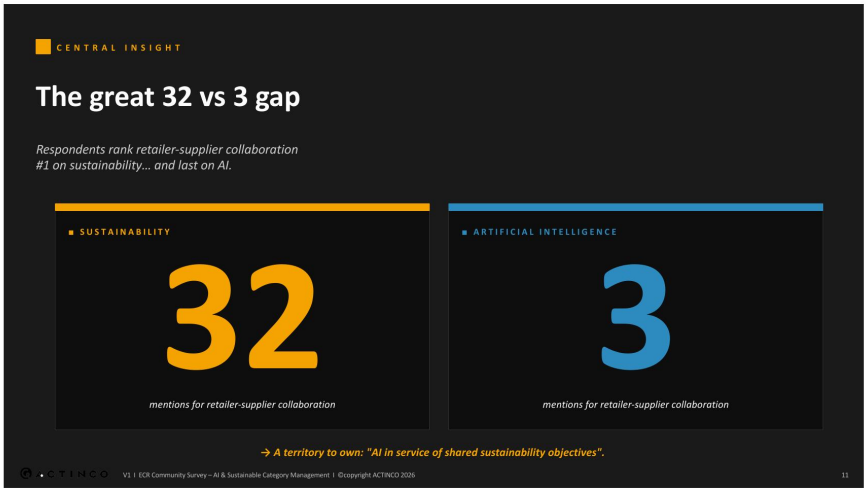


Figure 9 — The central gap: 32 mentions versus 3. Source: ACTINCO survey, ECR Community 2026.

Part 3 · CSR maturity and national signatures

6. CSR maturity: knowing how to measure, starting to govern, struggling to transform

On the integration of CSR into category management, the survey reveals a coherent gradient. ESRS reporting is the most advanced (average scores between 3.14 and 3.34 out of 5, water and marine resources leading at 3.34), governance follows (~3.0), while assortment alignment (2.90) and the deployment of sustainable processes (2.77) bring up the rear. **Companies know how to report, are beginning to govern, but struggle to transform the assortment and the process**. Notably, the five ESRS pillars show near-identical scores — no materiality prioritisation is visible, and the circular economy (E5) remains "initial" for 42% of respondents.

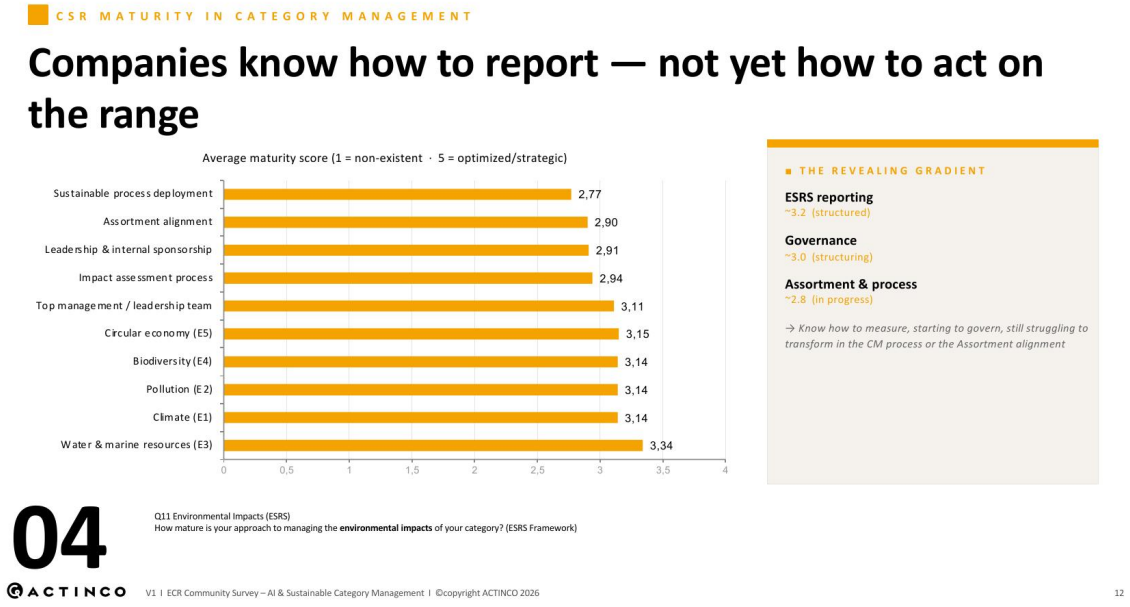


Figure 10 — CSR maturity gradient: measure, govern, transform (Q11). Source: ACTINCO survey, ECR Community 2026.

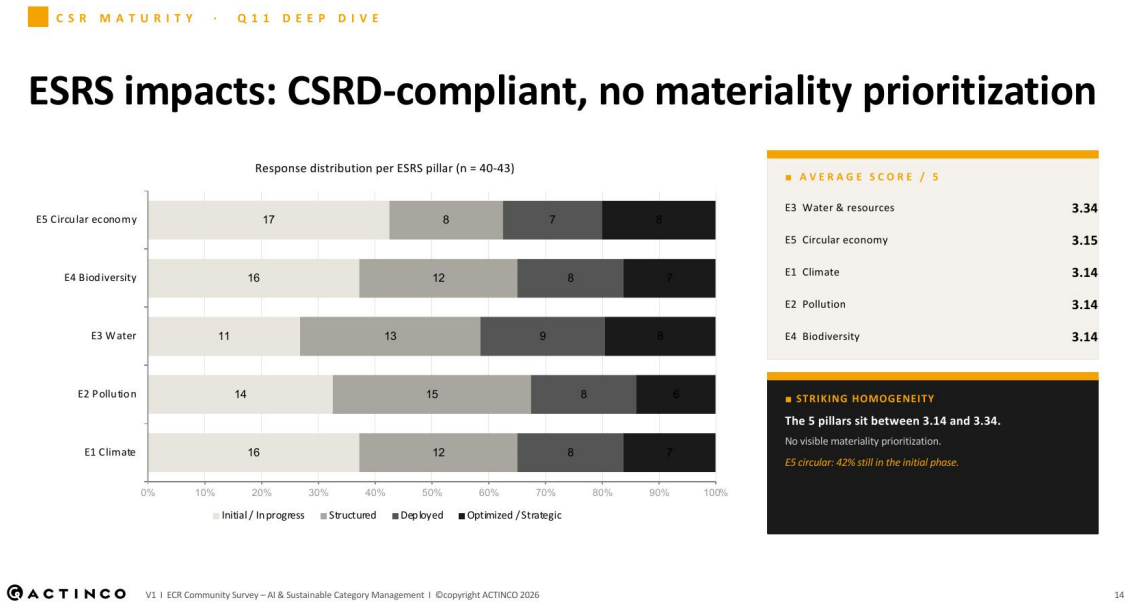


Figure 11 — Maturity by ESRS pillar (Q11). Source: ACTINCO survey, ECR Community 2026.

The survey also brings to light a telling retailer-supplier inversion: **manufacturers lead on top-management sponsorship (3.28 versus 2.89), while retailers lead on operational execution (3.32 versus 2.86).**

55% of respondents are still in the initial phase on the deployment of sustainable processes (2.78, the survey's floor). Half the market has not yet operationalised sustainable category management.

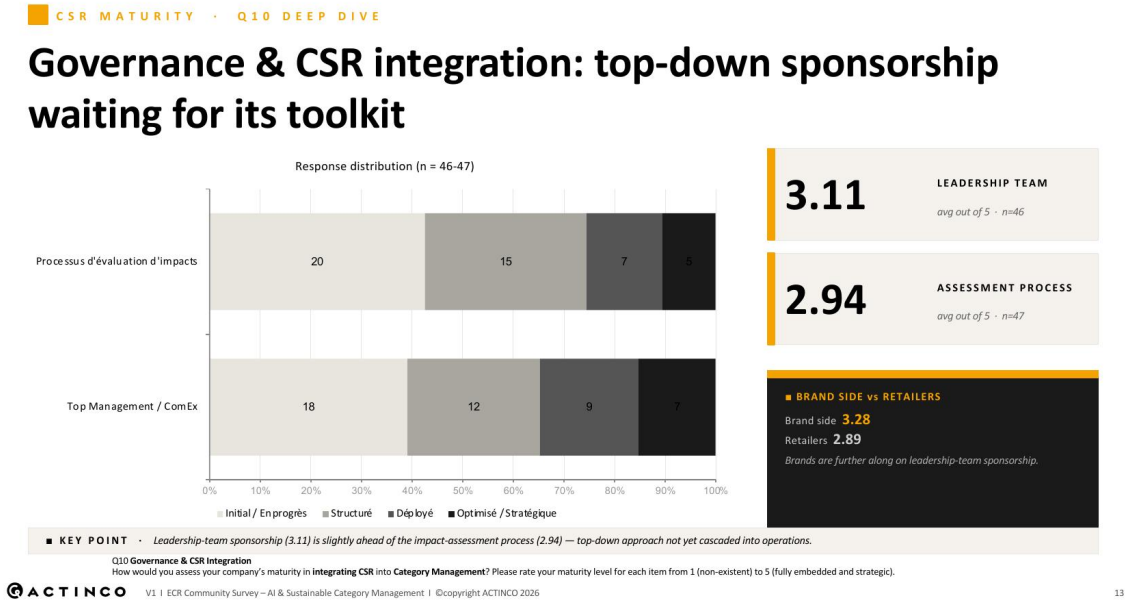


Figure 12 — CSR governance and integration (Q10). Source: ACTINCO survey, ECR Community 2026.

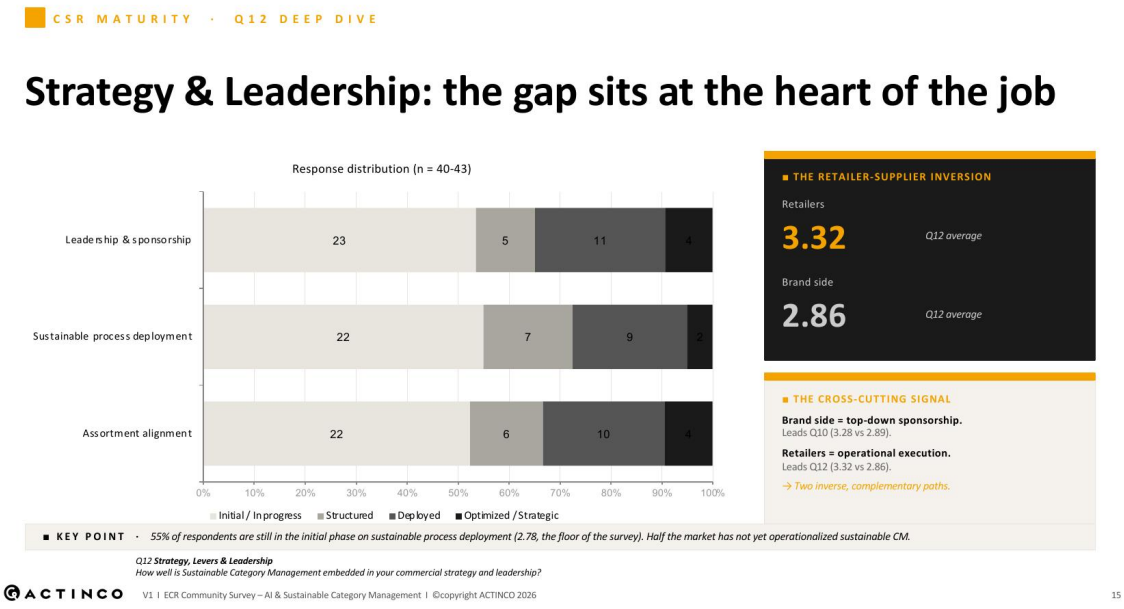


Figure 13 — Strategy & leadership: the retailer-supplier inversion (Q12). Source: ACTINCO survey, ECR Community 2026.

7. Four national signatures

The country comparison distinguishes four trajectories. The "Global" profile is the only truly operational one (strategy at 3.69). Italy and Switzerland know how to report but struggle to execute (high ESRS, strategy at the floor, 2.43 and 2.44 respectively). **France, finally, is "the market that sees the problem": it shows the lowest scores on all three axes (governance 2.72, ESRS 2.93, strategy 2.57), but its diagnosis is lucid — 53% of French respondents cite KPI misalignment as their #1 challenge, and the AI skills gap is pronounced there (three data & skills challenges tied).** On the opportunities side, French manufacturers bet on reporting automation and time freed up for strategy (13 mentions each) on AI, and on retailer-supplier collaboration (11) on sustainability.

ANNEX · COUNTRY BENCHMARK

Four national signatures

One shared objective, four distinct paths

FRANCE	GLOBAL	ITALY	SWITZERLAND
19	14	11	9
respondents	*respondents*	*respondents*	*respondents*
89% brand side	balanced mix	82% brand side	varied mix

The United Kingdom (n=1) is excluded from comparisons due to insufficient base.

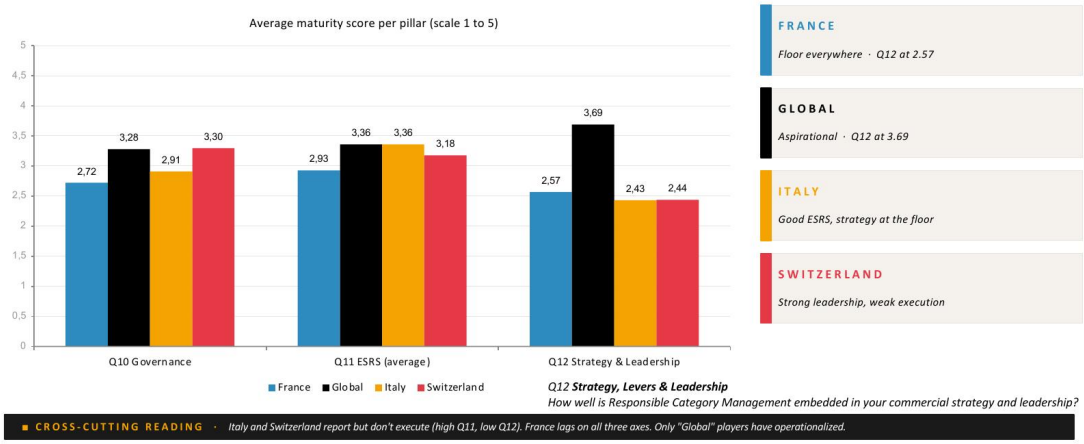
06

ACTINCO V1 I ECR Community Survey – AI & Sustainable Category Management I ©copyright ACTINCO 2026 18

Figure 14 — Four national signatures. Source: ACTINCO survey, ECR Community 2026.

ANNEX · COUNTRY BENCHMARK

CSR maturity compared: four distinct paths



ACTINCO V1 I ECR Community Survey – AI & Sustainable Category Management I ©copyright ACTINCO 2026 19

Figure 15 — CSR maturity compared by country. Source: ACTINCO survey, ECR Community 2026.

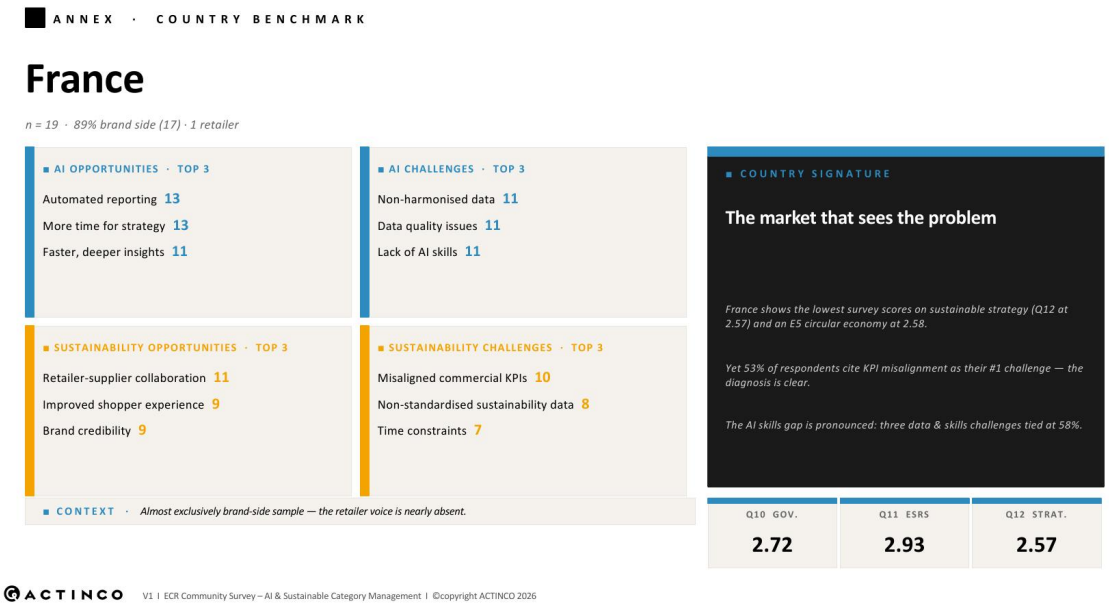


Figure 16 — France focus. Source: ACTINCO survey, ECR Community 2026.

Study conducted by ACTINCO, Masterminds®, Training, Strategic Collaboration
Your contact: Francoise Acca, francoise.acca@actin-co.com
More information: actin-co.com