

## Uncertainty

• In Part 1's "Uncertainty" section we explore tariff-related inflationary fears - using a fact based view of the US economy, shopper sentiment and trade reality we map how trade dynamics and inflation will impact shoppers, retailers and brands. We'll leave you with a key framework for navigating this reality as well how to learn where and when to pivot based on future developments. We're also featuring perspective and capabilities from some partners- whose real time capabilities allow you to target and adapt marketing as close to real time as you need to navigate this Certain Uncertainty.

## Certainty

- "Certainty" highlights our "Commerce2028" work most manufacturers in the world are seeing most of their forecasted growth between now and 2028 coming from a narrow range of retailers some like Amazon and Costco are an ongoing profitability challenge and some like Walmart are becoming more challenging on this front every day.
- Most of our clients, without correcting this, are looking at a 15-30% decline in customer profitability over the next 36 months. We'll leave you with an approach to planning to help navigate this new reality and critical action steps you'll need to take in building the 2026 plan to manage this structural profit deterioration.

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Nextellence isn't about theory. It's about helping growth brands win at retail — winning both what's now and next.

## **BRYAN** Gildenberg

Bryan is Retail Cities' Managing Director for North America. He supports our global insights in advisory engagements. Bryan is also the founder of Confluencer Commerce LLC, and a member of Bazaarvoice's Executive Advisory Board. He is a recognized retail expert with many appearances on and citations in the national media – including CNBC, The Wall Street Journal, the BBC and the Financial Times.

Bryan formerly worked with Omnicom as head of strategy for their global commerce marketing practice from 2020 through 2022. Prior to Omnicom, Bryan was Kantar's Chief Retail Knowledge Officer, setting the direction for Kantar when it came to retail insights and making sure Kantar's top tier of clients had the best retail insights the company could provide.

Bryan spends most of his time in Seattle or the New York Metro area, has an MBA from Babson University, and is a frequent guest presenter at major conferences in the retail universe.

