

# How Sam's Club, Kroger, Albertsons, and Instacart are evolving their retail media networks

Article

Amazon is the biggest retail media network in the US, accounting for three-quarters of retail media revenue share, per our forecast. But its limited grocery footprint leaves an opportunity

for competition. Here are recent updates in grocery retail media, and a prediction on the future of in-store retail media.

## Sam's Club

The Walmart Inc.-owned company will earn \$5.80 billion in US grocery ecommerce sales this year, according to our forecast. Sam's Club just updated its **Member Access Platform (MAP) retail media network**.

- Advertisers can view what revenues are generated by which ads.
- Sam's Club members can add items to their carts directly from retail media ads.
- Advertisers can target "browse pages," rather than just search pages.
- MAP advertisers can attribute in-store purchases to search ads.

## The Kroger Co.

Kroger will see \$15.85 billion in US grocery ecommerce sales this year, according to our forecast.

- Kroger announced it would bring its **Kroger Precision Marketing (KPM) retail media network** in-house in June, part of a growing trend of retailers maturing past partnership-based retail media networks.
- The self-service platform enhances ad automation and curation for advertisers.
- KPM boasted **the same sales impact across 51% fewer impressions** than third-party ad buys, according to senior vice president Cara Pratt.

## Albertsons Companies

Albertsons' US grocery ecommerce sales will total \$5.47 billion this year, according to our forecast.

- The Albertsons-Kroger merger is still up in the air, but if the merger does go through, Albertsons and Kroger **could combine retail media capabilities** over their 5,000-store footprint.

- In the meantime, **Albertsons is beefing up** its measurement capabilities with an aim toward standardization.
- Albertsons is also focusing on connected TV (CTV) via a partnership with Omnicom Media Group.

## Instacart

Instacart will account for \$35.19 billion in US grocery sales this year, according to our forecast.

- Instacart's **retail media business** grew 30% last year to \$740 million, per The Information.
- We project Instacart's ad revenues will grow another 43.8% this year to \$1.14 billion.
- **Instacart partnered with Roku** to deliver CTV ads earlier this year.

## Stores are the next frontier

**Insider insight:** **In-store retail media** ad spend will account for just 0.5% of US omnichannel retail media ad spending, according to our forecast.

- But come 2027, one-fifth of all US digital out-of-home ad spend will come from retail media.
- Brand displays on shelves, video ads on TV screens, digital screens at checkout, in-store audio, and displays in parking lots are all budding ad channels for grocery ad buyers.
- It's still difficult to attribute in-store purchases to in-store ads. This ad channel won't explode until retailers can access closed-loop data on who is seeing what ad and how that informs purchases.