

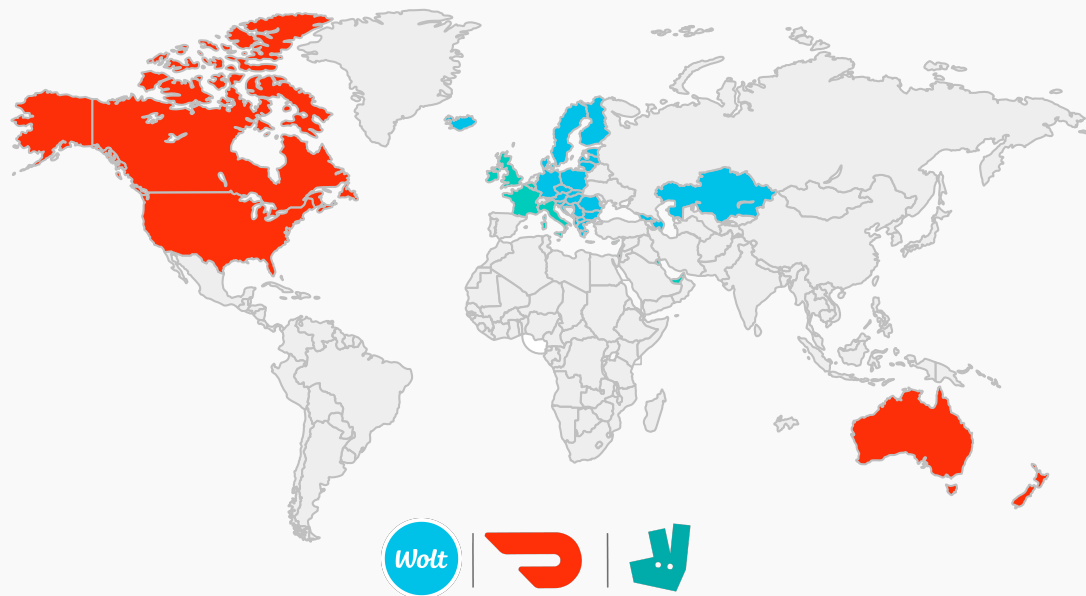


From Retail Media to Commerce Media

Winning the Moments That Turn Intent Into Measurable Growth

Renée Bornhammar

We are the **#1 fast delivery platform** outside China...



40+ countries across 3 loved brands



120M+ customers

1,000,000+ merchants

9M+ courier partners

Reach over
**56 MILLION
SHOPPERS**



Wolt

THE REFRAME: FROM RETAIL MEDIA TO COMMERCE MEDIA

RETAIL MEDIA

Ads on the retailer's own site, app and in-store screens — powered by that retailer's first-party data.

A closed loop, but a bounded one.

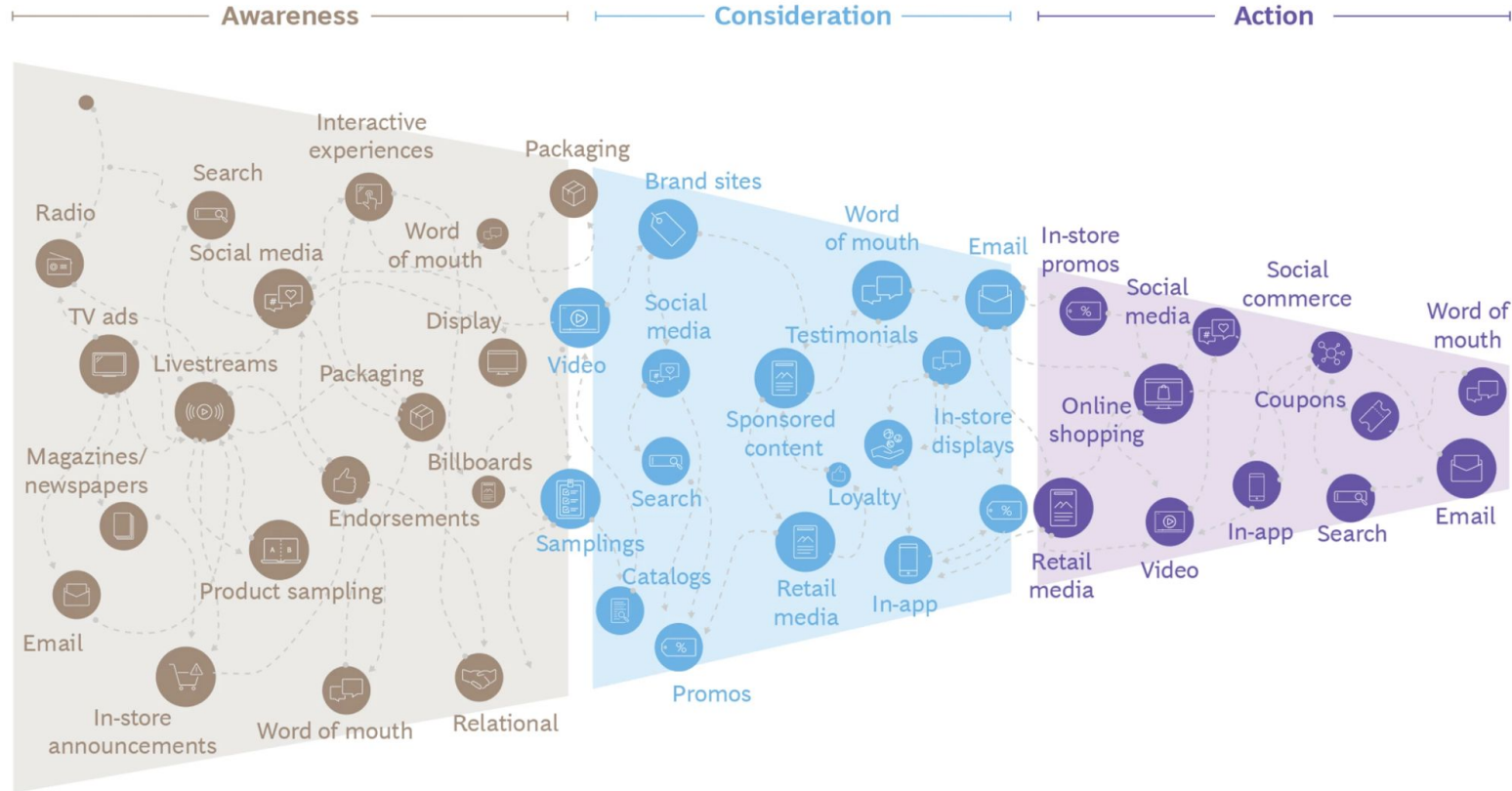


COMMERCE MEDIA

The same first-party data, activated beyond owned properties — open web, social, CTV — and beyond retail into any business with transaction data.

WHERE PURCHASE DECISIONS HAPPEN

Consumer journeys are already non-linear



Retailers need to be surfaced, trusted, and returned to

Three practical moves help retailers turn platform presence into repeat growth.



1.
**BUILD WHERE
CUSTOMERS ALREADY ARE**

Partner with platforms that combine audience, technology, logistics, and service quality.



2.
NAIL THE RETAIL BASICS

Complete catalogue. Strong content. Accurate availability. Fair pricing. Reliable fulfilment.



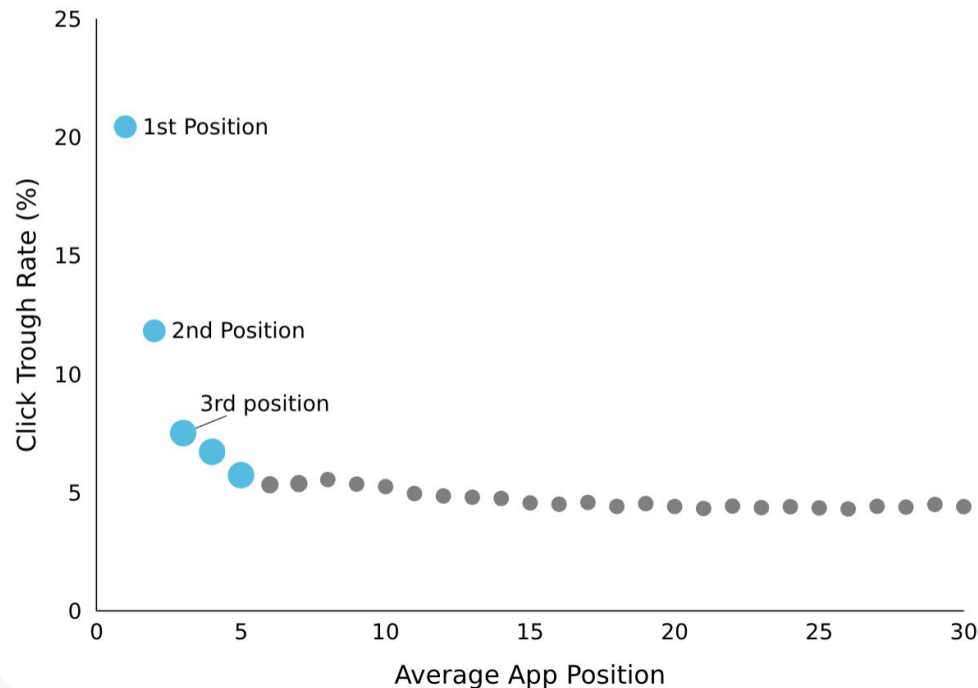
3.
**SHOW UP IN THE
MOMENTS THAT MATTER**

Use campaigns, deals, promotions, and ads to capture demand and drive repeat.

Attention is a valuable resource

60%

of users order from
venues in **top
positions**



WHAT COMMERCE MEDIA ADDS

A retail media platform built to drive results — reaching high-intent customers on Wolt and beyond.



PLAN

Data insights

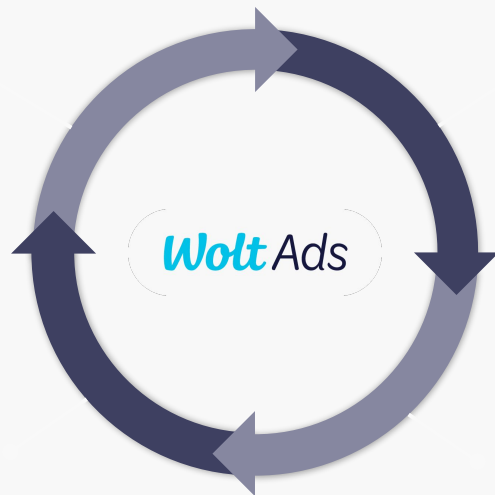
Identify and reach
your most valuable
customers



SELL

In-App

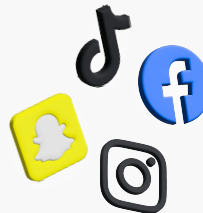
Solutions built to drive
conversions and boost
sales on Wolt



COMMUNICATE

Media

Increase visibility and
engagement in-app and
across digital platforms



ENGAGE

Offline

Extend your presence
with branded assets
– like delivery bags.



Wolt

Retail is core to our business, generating globally and **growing rapidly**

over 25% of Wolt sales



> 25%

Retail contribution to Wolt
(Q4, 2025)

Top 10

Online grocery in Europe*

40,000+

active retail venues
(Q4, 2025)

(Almost) anything delivered



Grocery



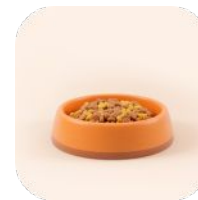
Alcohol



Health & Wellbeing



Beauty & Care



Pet Supply



Electronics



Home & DIY



Toys, Games & Kids



Flowers



Apparel

What helps merchants win on Wolt

The merchants that do best on Wolt tend to get three basics right



Selection

A 5-fold increase in assortment size is associated with a **~40% increase** in basket value



Quality

For every **7 orders** with unfulfilled item, the venue is expected to sell **1** fewer order the next month



Affordability

33% higher basket for orders when at least **1** promo unit is added

MOMENTS THAT MATTER

Retail demand spikes around key moments

The same convenience people use for everyday shopping becomes even more visible around gifting, seasonal peaks and key shopping moments.



Valentine's Day

Florist
sales rise

32x

International Women's Day

Florist
sales rise

20x

Black Friday

Electronics
sales rise

440%

Christmas / Holiday season

Toys and games
grow

133%

More than **30%** of annual retail sales come from major seasonal occasions.

CASE: WOLT IS BETTER WITH PEPSI

Driving +3 years of viewing time & +50K orders



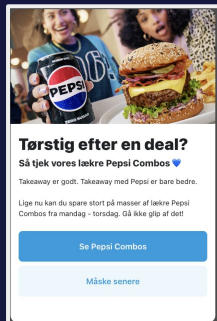
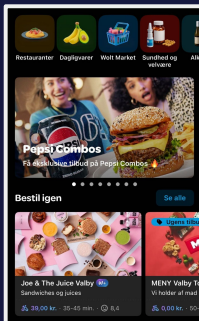
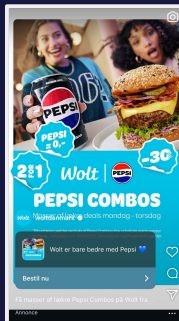
Upper funnel

Hero film to drive brand affinity and strengthen the Pepsi x Wolt connection.



Lower funnel

Targeted promo assets across Meta, in-app, and CRM to convert interest into Pepsi combo orders



THE TAKEAWAY

On-demand retail shopping do happen and it is rapidly growing

The question is not whether people shop online or shop in store.

The question is which online store they'll shop in.



Most likely in the one with:

- Wide selection
- Reliable service
- Available offers

That's the shift — from **reaching shoppers** to **winning the moment** they decide, and having the receipt to prove it moved growth.

