



# The MENA RETAIL MEDIA ROUNDTABLE

**Post-Event Insights Report**

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11 June 2026 | Atlantis The Palm, Dubai



## FOREWORD

# The Conversation the Industry Needed to Have

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On 11 June 2026, more than 100 senior marketing leaders gathered at Atlantis-The Palm in Dubai for the inaugural MENA Retail Media Roundtable – brought together by the Advertising Business Group (ABG) in strategic partnership with Publicis Groupe Middle East.

The format was deliberate: No presentations. No pitches. Ten closed-door roundtables, each tackling the questions that rarely get answered honestly in public forums: who owns the customer, who owns the data, who owns retail media inside the organization, and what will it actually take to unlock the investment this market is capable of.

What follows is ABG's synthesis of what the room said. It is not a verbatim record. It is an editorial distillation of the strongest, most consistent signals that emerged across all ten tables - shaped into the positions and priorities that ABG believes the industry must now act on.

The MENA retail media opportunity is real and it is significant. But it will not be realized through individual platform innovation alone. It requires a shared foundation - of standards, of trust, of organizational readiness - that only the industry, working together, can build.

This report is a starting point for that work.

### About the Roundtable

The MENA Retail Media Roundtable brought together CMOs, marketing directors, and commercial leaders from across the UAE and GCC for a morning of structured peer discussion. Three themes anchored the conversation:

- Measurement, transparency and trust
- Partnership and collaboration
- Building the future retail media ecosystem in MENA

*The event also marks the formal launch of the ABG Retail Media Taskforce.*



## THEME ONE

# Measurement, Transparency and Trust

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Across every table that addressed this theme, one word came up more than any other: standardization. The measurement problem in MENA retail media is not a lack of data. It is a lack of agreement on what the data means, how it is collected, and how it should be compared. Until that changes, investment will remain cautious and trust between brands and retail media networks will remain fragile.

***The industry is not short of metrics. It is short of metrics that everyone measures the same way.***

### ROAS Is Not the Problem. How We Use It Is.

ROAS remains the dominant currency of retail media investment - and the room was clear that this is part of the problem. Not because ROAS is the wrong metric, but because it is being used as the only metric, and in ways that actively mislead.

A profitable brand growing its market share while CPM rises or impressions fall is not underperforming. A brand hitting a strong ROAS number on a campaign that contributes nothing to category growth is not succeeding. The market is still learning to tell the difference.

The shift the room called for is from ROAS as a pass-fail test to ROAS as one input in a broader business growth framework. What is the profitable ROAS threshold for this brand at this stage? At what point does scaling stop being efficient? These are the questions retail media investment decisions should be built around - and they require a level of data maturity and brand-network dialogue that is not yet standard in this market.

### Incrementality Needs to Mean More

Incrementality came up at nearly every table - and so did the frustration with how narrowly it is being defined. Media incrementality (did this ad drive a sale in a 7 to 14 day window) is not the same as business incrementality (is retail media contributing to the growth of this brand in this market). The room was unambiguous: the latter is what matters, and the former is being used as a proxy for it in ways that do not serve anyone.

True incrementality means new demand creation. It means measuring whether retail media is shifting category share, not just shifting consumers from one platform to another. It means connecting investment to customer acquisition and lifetime value, not just to the next transaction. Until retail media networks and brands agree on this definition, the metric will continue to underdeliver on its potential.

### Standardization Must Come Before Consolidation

The appetite for a single consolidated data view is real and understandable. Brands are currently stitching together fragmented data from platforms, third-party research providers, and separate partner sources with no common framework. The operational cost of this fragmentation is significant - and it directly suppresses investment.



But the room made an important sequencing point: consolidation without standardization makes the problem worse, not better. If platforms are using different look-back windows, different attribution models, and different definitions of the same metrics, centralizing that data into one dashboard does not produce clarity. It produces a more sophisticated version of the same confusion.

Standardization must come first. Agreement on the baseline - what we measure, how we measure it, and what it means - is the foundation that everything else is built on.

### **Who Owns the Customer? The Question the Market Has Not Answered.**

Behind the measurement debate sits a more fundamental tension that the market has not yet resolved: who owns the customer data.

Brands are investing significant budgets on retail platforms. They want access not just to their own sales performance, but to category share, competitive engagement, and market context. Retailers are building and maintaining expensive platforms. They are serving multiple competing brands simultaneously. Sharing one brand's data in ways that could benefit a competitor raises genuine ethical and commercial questions.

Neither position is unreasonable. But the current standoff - where both sides are cautious and the data sits underutilized - is not serving the market. The room's view was that an industry-agreed baseline of minimum metrics, set by a neutral body, would give both sides a workable foundation. Not everything needs to be shared. But something needs to be standardized, and that something needs to be agreed collectively.



## THEME TWO

# Partnership and Collaboration

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The partnership conversation at this roundtable was notable for its candor. Brands did not describe their relationships with retail media networks as partnerships. They described them as transactions - often one-sided ones. The ATM machine metaphor came up unprompted at more than one table: brands putting money in, with limited visibility into what comes out and for whom.

This is not a sustainable foundation for the investment growth that both sides want. Building genuine partnership requires structural change - in how brands organize internally, in how networks engage commercially, and in how the industry defines shared success.

***Brands are not asking for everything. They are asking for enough to make informed decisions. That should not be a difficult ask.***

### The Organizational Problem Inside Brands

One of the sharpest insights from the partnership tables was that the biggest barrier to effective retail media collaboration is often not external. It is internal.

Retail media sits at the intersection of trade marketing, online marketing, e-commerce, data governance, and technology. Effective retail media strategy requires all of these functions in the room. In practice, most brands are approaching retail media with a subset of those stakeholders - typically media or marketing - and discovering late that trade budgets, governance frameworks, or technology stacks are misaligned.

The consequences are real. Deals that have progressed all the way to contract stage have been stopped by data governance teams who were not involved in the process until the end. Two years of relationship-building and alignment work can be undone by a single late-stage conversation that should have happened at the beginning.

The fix is not complicated: map the internal stakeholders retail media requires and bring them in at the start, not the end. This is an organizational discipline, not a technology problem.

### Agencies as the Bridge - If They Step Into the Role

Agencies appeared repeatedly in the partnership conversation - sometimes as part of the solution, sometimes as part of the problem. The room's view was that agencies have a critical bridging role to play between brand departments and retail media networks, but that many are not yet equipped or incentivized to play it.

The value agencies can add in retail media is not just execution. It is cross-functional translation - helping trade marketing understand media metrics, helping media teams understand commercial dynamics, helping brands navigate the data and measurement landscape without being entirely dependent on what the network tells them. That role requires capability that is still being built in this market.



## **Ownership Without Clarity Is a Growth Blocker**

Who owns retail media inside the brand organization? The answer, at most companies represented in the room, was: it depends, and it is complicated.

Retail media sits between marketing and sales, with the P&L held on both sides and the boundaries between the two still evolving. For brands navigating the shift from offline to online, this ambiguity is particularly acute. Until that shift stabilizes, clean single ownership is difficult to establish.

But the room was clear on what happens without it. Short-term team objectives dominate over longer-term brand strategy. Platform relationships become transactional because no one has the mandate to build something more durable. Investment decisions are made at the wrong level of the organization with the wrong data.

Retail media needs a named owner with a defined P&L. The function it sits under - marketing, commercial, or a dedicated retail media role - matters less than the clarity of the mandate. Without it, the organizational dysfunction becomes the ceiling on growth.

## **The Speed Problem**

Multiple tables raised the issue of execution speed, and it deserves to be named directly. The path from initial retail media conversation to signed agreement in this market can take close to two years. That timeline covers education, internal alignment, agency briefings, retailer negotiations, legal review, and governance sign-off - each step sequential, each step capable of restarting the clock.

By the time agreements are reached, the stakeholders who championed them are exhausted or have moved on. The opportunity cost is significant. Simplifying the path to partnership - through clearer commercial frameworks, earlier governance involvement, and better-educated stakeholders on all sides - is one of the highest-leverage improvements the market can make.

## **Shared Outcomes, Not Shared Objectives**

The framing shift the room called for was subtle but important. Shared objectives - agreeing on what we are trying to achieve - is necessary but not sufficient. What the market needs is shared outcomes: commercial structures where the success of the brand and the success of the network are genuinely aligned, not just described as aligned.

Market share gain is the clearest example of a true shared outcome. When a brand grows its category share on a platform, the platform benefits. When the platform drives category growth, the brand benefits. Investment in that kind of outcome is structurally different from investment in a media campaign that optimizes for the network's metrics. Building commercial models around shared outcomes - market share, customer acquisition, customer lifetime value - is the direction the market needs to move.



## THEME THREE

# Building the Future Retail Media Ecosystem in MENA

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The third theme invited the room to step back from the immediate friction and look at the structural question: what does a functioning retail media ecosystem in MENA actually need to look like, and what will it take to build it?

The answers were more optimistic than the conversations on measurement and partnership might suggest. The room does not lack confidence in the MENA opportunity. It lacks the shared infrastructure - standards, talent, frameworks, neutral conveners - to realize it at the pace the market is capable of.

***The opportunity is not in question. The question is who builds the foundation, and how fast.***

### **The Lesson From Mature Markets: Social Commerce Is the Model**

When the room looked to mature markets for lessons, the most compelling example was not the US or Europe. It was China.

China developed retail media at scale because it had to. The infrastructure demands of servicing a massive population at speed forced rapid innovation in how retail, media, and commerce connect. The social commerce model that emerged - group buying mechanics, AI-powered brand agents servicing consumers around the clock, seamless integration of discovery and purchase - is a blueprint that MENA is positioned to adapt rather than replicate from scratch.

MENA has the infrastructure. It has the data. It has a young, digitally native consumer base and a retail landscape that is developing fast. What previous attempts at social commerce in this market lacked was not market fit - it was tool readiness. The tools are now ready.

### **The Capability Gap Is Real But Closing**

Relative to the US, Europe, and China, MENA retail media is at an earlier stage of maturity. The capability gap exists across all three pillars of the ecosystem: brands, retailers, and agencies. This is not a market failure - it is where this market is in its development cycle.

What the room observed is that the gap is beginning to close, and is doing so faster than the broader narrative suggests. Retailers who have committed to retail media are hiring cross-border talent, importing best practice, and building capability at pace. Brands that have invested early are seeing the returns and pushing their organizations to build the internal structures to support more. Agencies are developing retail media practices where none existed two years ago.

The risk is not that the market cannot close the gap. It is that it closes it in ten different directions at once, without the shared standards and frameworks that would allow the ecosystem to scale together.

### **The Fragmentation Problem**

The MENA retail landscape is one of the most fragmented in the world. Quick commerce, specialist retail, beauty, grocery, general merchandise, luxury - each operating on different models, at different stages of data maturity, with different views on what retail media means for their business.



This fragmentation is not going away. But it cannot be allowed to become permanent fragmentation of standards, of measurement, and of commercial frameworks. The risk of MENA developing ten parallel retail media ecosystems - each with its own metrics, its own data governance approach, its own definition of partnership - is real. And it is the scenario that most limits the market's growth potential.

The antidote to fragmentation is not uniformity. It is a shared baseline - minimum standards that all players agree to, on top of which each can differentiate. That baseline does not exist yet. Building it is the market's most important near-term priority.

### **Agentic Commerce Is Coming. The Market Needs to Be Ready.**

The most forward-looking thread in the room concerned the impact of AI and agentic commerce on retail media. The view from several tables was that the data consolidation that brands have been asking for - and that the market has struggled to deliver - may be unlocked not by commercial negotiation but by technology. AI agents operating across platforms, consolidating signals, and making media buying decisions at scale could make the current walled garden model structurally obsolete.

This is not a near-term certainty. But it is a near-term probability that the market needs to plan for. Brands and networks that build their retail media strategies on the assumption that the current fragmented, siloed data environment is permanent are building on the wrong foundation.



## THE ROAD AHEAD

# ABG's Role in Shaping What Comes Next

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The roundtable made one thing clear above all others: the barriers to retail media growth in MENA are not primarily technological or commercial. They are structural. The market lacks a shared standards framework. It lacks a neutral convener and the talent infrastructure to scale. And, it lacks the cross-industry alignment that turns individual progress into ecosystem progress.

These are exactly the gaps that ABG exists to close.

### The ABG Retail Media Taskforce

The roundtable formally launched the ABG Retail Media Committee: a cross-industry taskforce dedicated to building the shared foundations the market needs. The Taskforce will operate as a neutral, industry-led body, bringing together brands, retailers, agencies, and technology partners to develop the standards, frameworks, and best practices that no single player can build alone.

*The priorities identified by the room will directly shape the Taskforce's initial workplan:*

- Developing a baseline measurement framework that all parties can agree to and implement - defining minimum metrics, common methodologies, and shared definitions that make cross-platform comparison meaningful.
- Building data transparency guidelines that resolve the ownership question practically - not through regulation, but through agreed commercial frameworks that give brands the visibility they need while protecting retailers' legitimate data interests.
- Creating an education and capability programme that addresses the talent gap across the ecosystem - from executive leadership to legal and compliance teams to trade marketing functions that have not yet been brought into the retail media conversation.
- Establishing a neutral forum for ongoing industry dialogue - so that the conversations that happened in this room on 11 June do not stop here.

### Why Now

MENA retail media is at an inflection point. Investment is growing. Platforms are maturing. Brand appetite is real. The consumer base is ready. ***What the market needs to realize its potential is not more time but a shared direction.***

The room that gathered on 11 June represented the decision-making power to make that happen. ABG's role is to turn that power into coordinated action: through the Taskforce, through ongoing research and thought leadership, and through the kind of honest, peer-level conversations that this roundtable demonstrated are both possible and productive.

The foundation does not yet exist but ABG is committed to building it.

To learn more about ABG and the Retail Media Taskforce, email [secretariat@abg-me.com](mailto:secretariat@abg-me.com) or visit [abg-me.com](http://abg-me.com).