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Retail Tech Trends

2024-25
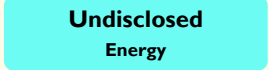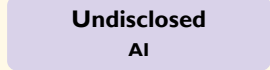
Since its inception, Daphni has pledged to support startups that are redefining the way we produce, distribute goods and services and consume.

In 2022, we reinforced this commitment by launching **Dastore**, an €80 million fund aimed at globally financing entrepreneurs and innovations that are shaping the future of retail.

Over the past two years, we've backed 18 incredible teams across six countries: France, Germany, the UK, Sweden, the US, and Brazil, with the support of +100 experts.

This report is an opportunity for us to reaffirm Dastore's commitment to supporting the visionaries in our ecosystem and, above all, to emphasize our convictions regarding the forthcoming transformations in retail: largely dominated by an expected adoption of AI, but not only that…

DASTORE

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Dastore Portfolio

Albatross	stockly	Underdog	Voltfang
carbonMaps	DEMA	EMPERIA	Prediko
waysia 方圆食里	ida	H	Subscribfy
JUST	NG.CA$H	🏝️ Poolday.ai	Dift by Captain Cause
Undisclosed Energy	badge	Undisclosed AI	

Team's other deals in the Future of Retail

Geev	Back Market	FAUME	trusk
foxintelligence	typology.	ADORE ME	HUBCYCLE

Our top 10 key Retail trends

1. Market research & customer insights
2. Introducing AI in procurement
3. Hyper-personnalisation in customer services
4. From social apps to super apps
5. Material discovery & new packaging
6. Is backing the Shopify ecosystem still a VC play?
7. From specialized robots to polyvalent humanoids
8. Optimizing energy consumption
9. Bringing AI to content creation
10. Traceability in supply chains

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01

Market research
& consumer insights

Market research & consumer insights

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AI customers interviews

Conversational AI assistant for qualitative interviews & Gen AI Market Research

Conveo · Listen · remesh · outset.ai · tellet

Gateway · meaningful · forelight · GetWhy

Streetbees · resonate · CrawlQ.ai · voicepanel
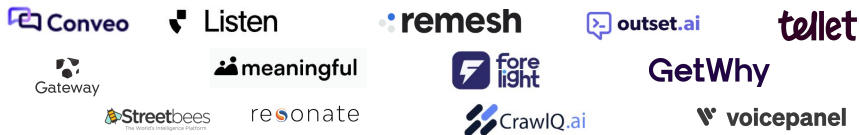
Synthetic data driven insights & digital customers twins

Semilattice · Lakmoos · experial · Eleya

AIPath · Native · CulturePulse · Electric Twin

Syntheticusers · Artificial Societies · Synthetic Humans

Market intelligence solutions

qualtrics XM · glaut* · Revuze

KANTAR · Forsta · YouGov

Bilendi Discuss · CentricSoftware · Nielsen

appinio · Prolific · flipflow · Pollfish

synthesio · Getwizer · GWI.

Customer Feedback management

Surveys & Customer feedbacks collections

customer.io · Magic Feedback

Trustpilot · Formbricks · Keatext · sentione · Chattermill · Alida.

SurveyMonkey · hello customer · FORESEE · Ask Nicely · mopinion · HappyOrNot

SurveySparrow · Yogi · RefVault · Medallia · APPFOLLOW · Reputation · InMoment

QA, Insights & CS Coaching

Kaizo · Vitally · HiOperator · theloops · Klaus · NEXT · claro · Tethr · Contexta360

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AI enables brands and retailers to gather deeper consumer insights faster and at scale, supporting informed business decisions. Cost-effective alternatives to traditional market research methods, like focus groups and interviews, are emerging.

💬 AI-powered Survey & Qualitative Research

Qualitative research, traditionally time-consuming and costly, is now faster and scalable through AI tools analyzing text, voice, and video. These tools transform unstructured qualitative data into quantifiable insights that integrate seamlessly into larger datasets. Similarly, AI-driven surveys have become more sophisticated, improving data collection efficiency.

🗣️ NLP-driven Sentiment Analysis

Advances in NLP now allow businesses to analyze vast open-ended responses in surveys and reviews, offering better insights into customer sentiment and trends. Enhanced sentiment analysis tools accurately capture emotions, preferences, and pain points, even recognizing nuances like sarcasm and context.

Looking ahead to 2025, **AI-moderated interviews will become a commodity, with the real innovation focused on synthetic data and customer digital twins.** Emerging models must refine proprietary databases to deliver clearer ROI and build defensibility.

Companies to watch out for

◎ **Semilattice** 🇬🇧
Human simulation platform to predict consumer behaviours with AI models

Synthetic*users* 🇬🇧
Market research platform based on human-like AI participants

flipflow 🇪🇸
Providing real-time information about product, markets, & competitors status

◎ **Semilattice**
"Traditional research methods are all solutions to the problem of not being able to query and observe people at scale. This problem goes away if you can computationally generate people and observe their behaviour in software. AI will accelerate and expand the reach of traditional research methods, but the more interesting question is how research should be reinvented now that it's been freed from these traditional constraints." **Joseph Wright Co-Founder & CEO @Semillattice**

02

Introducing AI in Procurement

Approval Workflows | **Vendor Management** | **Inventory Planning** | **Sourcing** | **Negotiation Platform**

Indirect purchases

Omnea | pivot | coupa
Payflows | naJar | procurify
zip | Flowie | tropic

Direct purchases

Freqens PACTUM
tropic

permut | solutions | Anaplan | PIGMENT | Prediko | coupa
PEAK | RELEX | flowlity | Flieber | ZYCUS COGNITIVE SOURCE TO PAY | GEP

ida | Afresh

Wonnda | KWAYGA
Torg | TRIDGE
kheops
LightSource

In early 2024, "procurement" became the magic word in tech circles, with startups like Pivot, Payflows, Omnea, securing tens of millions of euros in funding at valuation multiples that put 2021 to shame.

This frenzy was fueled by several factors: the undeniable success of Coupa or Zip, companies' relentless drive to gain tighter control over costs, and a massive, underserved market crying out for flexibility. Traditional ERP systems, with their clunky interfaces and rigid frameworks, having failed to keep pace, often proving too costly or inadequate in meeting modern demands for automation and AI integration.

The buzz around procurement in 2024 wasn't just a hype.

AI's influence in the space stretches far beyond mere productivity. It's all about enhancing **supplier selection** with smarter data insights, optimizing **inventory management**, and tightening up **compliance and contract processes.** Predictive analytics powered by AI are giving companies a strategic edge, allowing them to foresee and react to demand shifts with agility. Moreover, AI is crucial in **risk management,** offering foresight into potential supply chain hiccups before they turn into full-blown crises, ensuring smooth and continuous operations.

Challenges remain for CPOs : 21% say their data infrastructure maturity is low, with less than 70% of spend data stored in one place. While an additional 30% think they have average levels of data maturity. *(Mckinsey 2024)*

Companies to watch out for

Prediko
Raised
+$6M
🇬🇧

ida
Raised
$3M
🇫🇷

pivot
Raised
$27M
🇫🇷

Freqens
Raised
$3M
🇫🇷

"AI is transforming procurement from a back-office function into a strategic growth enabler. From automating routine approvals to predicting supply chain disruptions and optimizing supplier negotiations, AI-driven solutions are giving companies unprecedented control and agility. Companies adopting AI gain a competitive edge, while those sticking to outdated systems risk obsolescence" **Mateo Beacco, CO-Founder & CEO @Ida**

03

Hyper-personnalisation in Customer Service

Smart Shopping Assistant, Customer Engagement and Personalization

Search optimisation & personalized recommendation tools

enso · Dialog · algolia · Gleen · Quark.ai · HelperAI · inbenta. · Autodm AI

miros · yellow.ai · sprinklr · trengo · Kaisa · rep.ai · iAdvize

respond.io · Connectly · Goodays · callvu · raudaAI · parloa · Sandra AI

HELLO MY BOT.IO · Plain. · SIERRA · conversica powerfully human · kommunicate · Botcopy · Brainfish · KODIF

Social Media & Whatsapp

chatfuel · Message · Inro · Hoola · Ubu · keplero

text yess · Simio · WAX · DR*P · eBanqo

Email

mailchimp · braze · Amperity & · Dartagnan

klaviyo · Kiliba · Reelevant.

Ticketing management solutions

CS Automation

HubSpot · Kustomer · yalo · kapture · gorgias · yampa.

Klark · Forethought · Yuma.ai · ada · Cobbai · lang.ai · neople · Ultimate. · Style

Help Scout · Cohere · kore.ai · INTERCOM · 8Flow · zendesk · Ginzi

Voice CX

gnani.ai · CallShift.ai · NEBESTA · PolyAI

diabolocom.ai · Onepilot · ringneck.ai · FLIP

HAPPYROBOT · parloa · Synthflow · AGARA

AI in customer service: hyper-personnalisation, a strategic imperative for brands & retailers!

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GenAI has redefined how brands interact with their customers; allowing them to offer greater seamless and hyper-relevant online experiences, and thus improve conversion, engagement and customer satisfaction. The driving force behind these solutions is foundational LLMs. Key GenAI-powered opportunities that are taking the online customer experience to the next level:

🛍️ **Smart shopping assistants on merchant websites,** providing customers with tailor-made advice and personalized recommendations, offering an equal if not superior level of service and personalization to the in-store experience, 27/7.

💬 **One-to-one conversational tools on social media** enable greater personalization in brand-customer interactions by engaging customers on the platforms they frequently use; this approach meets customers in their 'natural habitat,' adapting to their habits and preferences.

❓ **Ticketing solutions** empowering sales and support agents with LLMs to provide faster and more accurate responses. By automating a substantial portion of ticket handling, these solutions reduce the workload for agents, allowing them to concentrate on tickets with higher added value.

However, it seems that brands & retailers are not ready yet to automate 100% of the customer service. Indeed, as it could have a strong impact on engagement and retention, they want to keep control over this highly strategic aera. At this stage, they are especially looking for co-pilot tools optimizing existing processes.

Companies to watch out for

Autodm AI
Verticalized AI conversational platform to boost sales & marketing, on industries with complex products

KLARK
AI for customer support made for e-commerce businesses

WAX
Building a personal conversation between brands and consumers on Whatsapp

"*B2C companies with complex products turn to us to revolutionize sales using Conversational AI. By asking the right questions, our technology uncovers consumer needs and matches them with the right products or services. Our customers typically see a 250% boost in lead capture and significant increases in sales conversions.*" ***Philippe Wellens, Co-Founder & CEO @Autodm AI***
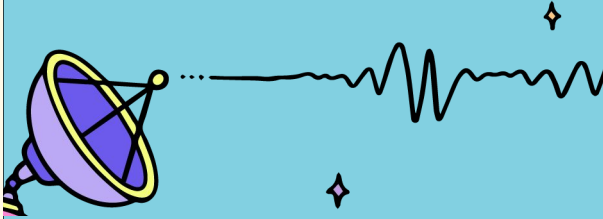
Autodm AI

04

From social apps to Super Apps
a wave coming to the US/Europe ?

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> **Elon Musk** ✓ ✕ @elonmusk · 5 oct. 2022
> **Buying Twitter is an accelerant** to creating X, the everything app
>
> 💬 33 k 🔁 43 k ♡ 387 k ▢ 🔖 ⬆

Super apps have already conquered Asian markets…

WeChat · Alipay · Meituan · TikTok — 🇨🇳

Paytm — 🇮🇳

gojek — 🇮🇩

LINE — 🇯🇵

Grab — 🇺🇸

Zalo — 🇻🇳

TALK — 🇰🇷

… And some US social apps have been trying to transition into super apps in recent years to capitalize on their massive communities:

WhatsApp — *2.95bns users* → **Communities** (used in several countries as matchmaking, private tutors, etc) → **Whatsapp for Business** → **Whatsapp Payment** (not in the US/Europe)

Facebook — *3.07bns users* → **Marketplace** → **Facebook Pay** → **Gaming** → **Dating**

X — *611m users* → **Job marketplace** → **Lots of announcements by Elon Musk are yet to be deployed**

The 🎵 TikTok Shop wave is coming

Launched in the US in Sept. 2023.
Spain and Ireland in Dec. 2024.
TikTok Shop is already bigger than Shein, Sephora and Qurate.

Impressive growth in the US with stellar metrics

$35 AOV

5.3 Transactions/Customer

50% of users using TikTok once a month have already made a purchase

From social apps to super apps : a wave coming to the US/Europe ?

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The answer is probably no…

🔒 Regulatory Challenges
Asian super-apps often grew with less regulatory oversight, particularly regarding data privacy and financial regulations, which would be hard to replicate in the U.S. or Europe.

📈 Cannibalization
Meta might be hesitant to consolidate Instagram and Facebook into a single app due to potential cannibalization of ad revenues across different platforms. Would be the same for any other platform.

💵 We don't have the "wallet" culture
We have a legacy of credit and debit card usage, which inhibits the adoption of mobile payment systems that are central to super apps. In Asia, many markets leapfrogged directly to mobile payments due to a lack of widespread banking infrastructure, which helped super apps flourish.

📱 Fragmented app market
In Europe and the U.S., the app market is historically fragmented with many specialized apps, each offering limited services. This fragmentation is due to the legacy of web-first services that later transitioned to mobile, unlike in Asia where mobile-first strategies allowed for the integration of diverse services from the beginning.

.. for now ?
Even though TikTok may face a ban in the U.S./Europe at any time, the breakthrough of TikTok Shop is a significant phenomenon that validates the ability of apps that capture users' attention to convert purchase intentions. With Elon Musk in the U.S. government, we can expect a relaxation of regulatory constraints, which could pave the way for U.S. apps.

Our Bet ?

A certain "app fatigue" along with the development of AI agent suites justifies the relevance of having a single application that covers multiple needs. Moreove Â European and US consumers need to be reassured about how their payment data is handled, thus placing all actors controlling financial flows in the best position to build a 'super app'-like platforms.

Potential winners

 Pay   Klarna

Revolut   G Pay

05

Material discovery & new packaging

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Alternative Packaging

Seaweeds & Alge

SWAY
plantsea
FlexSea
NORIWARE
Searo Labs
B'ZEOS GREEN TECH
LOLIWARE
ERANOVA Technology from the sea
Notpla
kelpi

Wood

RAIKU
WOODLY
cilkoa
PAPTIC
creapaper

Plants & Moulded Fiber

FOOTPRINT
TemperPack
TranscendPackaging
PulPac
THE WHOLELEAF COMPANY
vericool
arekapak
CelluComp Material Change for Good
Xampla
freckl.

Waste

SULAPAC
SOLUTUM
traceless
POLY X LABS
Genecis
PAQUES biomaterials
Calyxia
LYS VEGANBOTTLE PACKAGING
relicta
SHELLWORKS
RWDC INDUSTRIES
MYCOCYCLE
NOHBO
Lactip
Xampla
BIOME BIOPLASTICS
BIOWEG
MI TERRO
green dot BIOPLASTICS
EVANESCE
CELLUGY
Floreon
BIOPHILICA
TripleW

Mycelium & Fungi

MAGICAL MUSHROOM COMPANY
MYCOWORKS
MadeRight Bioengineering materials
GROWN bio
NoMy
altM
Bolt
mogu MEDICAL BY MOGU
LA FOUNDARY

Other

Papkot
LAM'ON
Poly materia
Woola

Discovery & Design platforms

altrove
THE CITRINE PLATFORM
Orbital Materials
amcor
materials nexus
PHASETREE
MATTRA
packmatic
athena GREEN SOLUTIONS
one•five
MaterialsZone
KEBOTIX
xinterra
erthos
Constantia Flexibles
Gali
Gemell
Osium AI
ENTALPIC
radiant matter.
Chemify
CARBIOS
cusp.ai
TEYSHA TECHNOLOGIES
Checkerspot
MULTISCALE TECHNOLOGIES

Quality Control

fleeptech
Apeel
Freshinset
NAT4BIO
StePac
ADVANCED MATERIAL DEVELOPMENT
ColorSensing tracking true colors
saveggy
It's Fresh!
scantrust
SENOPTICA TECHNOLOGIES
sofresh
mimica
AgroSustain Natural plant protection
agreenet
mori
PROTEME

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Alternatives to Plastics:
Alternatives to Plastics: Alt. plastics are expensive to produce and have found a market in the packaging industry, where the cost of sustainability & innovation can be redistributed to the end consumer, unlike most industrial plastic applications.

Below are key insights into the Alt. plastics industry;

Market Value	Market CAGR	Annual Output
$6B	**17%**	**1%** of annual plastic production

Material Discovery Platforms: AI and ML algorithms can predict the properties of new compounds and materials based on large datasets of chemical properties at unprecedented rates. AI-driven platforms can screen thousands of potential compounds to identify those with desirable characteristics, such as strength and cost-effectiveness.

Companies to watch out for

altrove
Design, synthesize, and manufacture alternatives to critical materials at scale

ENTΛLPIC
AI-driven platform discovering catalysts for sustainable chemical processes

one•five
AI-driven materials discovery and development platform accelerating the deployment of high-performance, affordable, and sustainable packaging solutions

one•five

"We believe the right material solution already exists; the problem is, it's not ready for the market. Our machine learning platform discovers and assesses biomaterial innovations slumbering in research institutions. The team then transforms the most attractive solutions into market-ready products the industry will accept" ***Claire Hae-Min Gusko, Co-Founder @one•five***

06
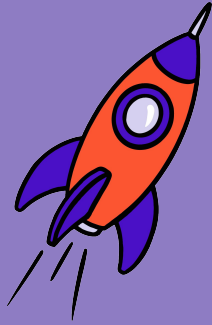
Is backing the Shopify ecosystem still a VC play ?

Is backing the Shopify Ecosystem still a VC play ?

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Shopify, the key player in global e-commerce that continues to gain ground

+$1.0T	>10%	$131B	Merchants in +175
GMV since inception	US e-commerce market share	Market Cap	countries

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Many leading VC backed solutions for merchants are dedicated to Shopify merchants or were born within the Shopify Ecosystem

Marketing Automation — klaviyo, yotpo.

Subscription — SUBSCRIFY, recharge

Checkout Solutions — JUST, pretty damn quick

Customer Support — gorgias

App builders — tapcart, Appbrew

Inventory Management — Prediko

Intelligence Platforms — DEMA, Polar ANALYTICS, Triple Whale

Logistics — bigblue, loop

In the meantime, **Shopify is developing its own applications**, which are starting to gain traction

shop Pay
Checkout solution for Shopify brands

+$175B	+$17B	150m
cumulative GMV (Since Launch in 2017)	GMV in Q3 2024 (+42% YoY)	Buyers opted-in

shopify plus
Enterprise-level solution to address high-volume, international and omnichannel brands

31%
of Shopify's MRR coming from Shopify Plus

Other products:

linkpop — *Shopify store integrated in your social bio*

shopify POS — *Integrated omnichannel POS*

shop — *Marketplace AI-boosted*

Is backing the Shopify Ecosystem still a VC play ?

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Our bet ? YES it is still a VC play

Shopify is already an essential platform in the e-commerce ecosystem, and this is unlikely to change:

- Shopify should no longer be seen as an ecosystem for "small" brands. In 2024, the platform integrated several enterprise brands including Suntory, Harry's, Hanes, Intersport, Luxottica, AMI Paris, and others…
- The international potential is still untapped, as 80% of Shopify's revenue comes from North America
- Shopify's complete omni channel offering should allow it to address a broader spectrum of clients

Even though Shopify develops many new features internally, we believe that Shopify will continue to encourage app development on the Shopify App Store to attract the best solutions and meet all needs. Some key metrics about the Shopify App Store include:

- The App Store hosts over 9,700 apps
- 87% of Shopify merchants use a Shopify app
- A typical Shopify merchant uses about 6 apps on average

We certainly view Shopify as an accelerator rather than a threat for early-stage "enablers" in e-commerce. However, we believe that at a certain level of maturity, it is important to diversify the approach and have the capability to integrate with other CMS platforms.

"Shopify's App Store has supercharged Prediko's go-to-market strategy. In just 12 months, we launched publicly and became one of Shopify's top inventory management apps. Today, the App Store drives a significant share of our monthly pipeline, proving its power as a platform for scaling Shopify partners like ours." **Youri Moskovic, CEO @Prediko**

Portfolio companies leveraging Shopify

JUST
Smart checkout

DEMA
Intelligence Platform

SUBSCRIFY
Converts clients into subscribers

Prediko
Inventory Management Platform

07

From specialized robots to polyvalent humanoids

From specialized robots to polyvalent humanoids

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From specialized robots …

Bin Diggers

ATTABOTICS

AutoStore

NOYES TECHNOLOGIES

ocado

intellistore

Shelf Carriers

amazon robotics

LOCUS ROBOTICS

PRIME robotics

GreyOrange

iFollow

Modular Robotics

Galam Robotics

Rack Climbers

Bionic HIVE

EXOTEC

Shelf Scanning

simbe

badger technologies

bossanova

AI Software for Robotic Arms

JACOBI ROBOTICS

HEXAGON MANUFACTURING INTELLIGENCE

inbolt

T-robotics

… to polyvalent humanoids

VLAM / AI Brain for Robots

covariant

Field AI

t+n

Paddington Robotics

TorqueAGI

Physical Intelligence (π)

SKILD AI

Humanoid Hardware

Agility Robotics

APPTRONIK

Unitree Robotics
High-performance Quadruped Robots

LIMX DYNAMICS

FIGURE

KINISI

BostonDynamics

From specialized robots to polyvalent humanoids

We're observing an evolution in robotics from specialized robots, which excel at specific tasks, to versatile humanoid robots capable of performing a wide range of activities. **Humanoid robots, driven by advanced AI and LLMs, can adapt to various tasks such as picking, packing, and loading, which traditionally required multiple specialized machines.**

This adaptability allows them to seamlessly integrate into environments designed for humans (like warehouses) without extensive modifications. As these robots become more widespread, their **production costs will decrease, offering significant economic advantages over fleets of specialized robots.**

According to Bruno Maisonnier (founder of Aldebaran Robotics & Another Brain), while the development of human-robot interactions necessarily involves a humanoid version, there are still some key aspects to be unlocked before achieving widespread adoption of robots:

1. **Introducing human body characteristics to robots, such as flexibility**
2. **Giving robots the ability to understand and convey emotions**

Companies to watch out for

FIGURE
Raised $854M

Physical Intelligence (π)
Raised $470M

SKILD AI
Raised $300M

Agility Robotics
Raised $328M

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another brain
ALDEBARAN UNITED ROBOTICS GROUP

"To be accepted, humanoid robots must be perceived as lively and friendly, with a certain emotional intelligence, to facilitate human interaction. This will hold true everywhere, even in warehouses." **Bruno Maisonnier, Founder @Another Brain & Aldebaran Robotics**

08

Optimizing energy consumption

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Optimising Energy Consumption

EMS, Optimisation

companion. energy | GridPoint | Equilibrium Energy | cleanwatts
AMPOTECH | tibo energy | GridBeyond | wattnow | ecoplanet

Next Gen BMS's

BRAINBOX AI | sensinov | 75F | enerbrain | Bisly
Wattsense | facilio | bbp | ENTO | eficia smart building

HVAC, Refrigeration, & Cooling

AXIOM CLOUD | SOLAR POLAR
SolarPolar | SNOFOX | dnergy
BLUE FRONTIER | Rebound Technologies | PackGy
ENCYCLE | obeau | BeeBryte New ways for energy efficiency
parity | Articae Smart Technologies | Sensibo
PHONONIC | GLACIERGRID

Microgrid Stack

Storage

Voltfang | sonnen | CACTOS | AlphaESS | terralayr | NOSTROMO | PEAK POWER
Storio | INTILION | Polarium | TESVOLT THE ENERGY STORAGE EXPERTS | SCALE ENERGY | enerkii

Solar

enrise | greenyellow SHIFT TO PROFITABLE ENERGY | Alight | URBASOLAR | Path ENERGY | OPTERA | Shawton ENERGY | helexia

EV Station

TESLA | ELECTRA
viggo | Beev
Osprey EV Charging Network | EVgo
VIRTA | Allego
IONITY | mer Pure energy from Statkraft
chargepoint | wallbox
GRIDSERVE

Markets

Flexibility

Tilt | FEVER
symphonics | Elyos
axle | Orus Energy

Procurement

Reel | open | INRANGE | tem!
Powerledger | LevelTen Energy | trawa.

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Optimizing energy consumption

As energy prices have returned to pre 2021 levels, the recent energy crisis has triggered global awareness, particularly among businesses where energy has become a top management priority. For retailers, the focus has shifted to energy procurement, management, and optimization. **Specifically, the increase in energy expenses for major retail players in France in 2024 was estimated at €1.5 billion.**

While introducing green energy into the mix is a potential solution, it also introduces a critical challenge: **managing intermittency.** Without the right tools, such as EMS and optimisation solutions, **what was once a predictable and stable budget for energy becomes far more volatile.** EMS solutions are crucial for providing real-time insights into energy consumption and optimizing energy usage by aligning demand with the fluctuating renewable availability.

Also, microgrids offer dual benefits: They allow for autoconsommation and provide the infrastructure to participate in flexibility markets and energy trading, particularly during periods of surplus generation. Retail stores have already demonstrated this potential by installing batteries and solar panels, enabling them to reduce energy costs, optimize consumption patterns, and generate additional revenue.

Companies to watch out for

V Voltfang
Energy storage solutions using recycled electrical vehicle batteries

Tilt
The platform for managing electrical flexibilities and demand response

companion. energy
Providing energy management, forecasting and flexibility software

"Energy can be costly unless you understand how to leverage the mechanisms of the market. By integrating battery flexibility into their operations, retailers can take advantage of lower costs, increased reliability, and access to renewable energy sources." **David Oudsandji, Co-Founder & CEO @Voltfang**

V Voltfang

09

Bringing AI to content creation

Bringing AI to Content Creation

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Image Generation & Editing Studio

Midjourney | Pencil (A Brandtech Company) | Haiper | Omneky | lasqo | BlendAI | VIZCOM
Kittl | Canva | ZMO.AI | Gamma | Kive | resleeve | seelab | VEESUAL
Adobe Firefly | Playground | Ecomtent | veeton | Picsart | stability.ai
CSM | Ideogram | Photoroom | PRESTI | BOTIKA | Recraft | BR:A | Leonardo.Ai

Text & Writing

copymatic | WRITER
wordtune | copy.ai | Hypotenuse AI | Smartwriter.ai
smartberry ai | contents | Jasper | Writesonic
HyperWrite | copysmith | anyword | [P E R S A D O]

Speech & Voice

Vidext | Spext | Listnr | ElevenLabs
PAPERCUP | NeuralSpace | MURF.AI
voiseed | LOVO | hume ai | ai|coustics

Video Generation & Editing Studio

Wisecut | Argil | Capsule
Poolday.ai | Hour One | munch | Fliki | KERV | sanas | Pika | VYOND | loom
LTX Studio | invideo AI | PlayPlay | Visla | PIPIO | HeyGen | mojo | Lately
runway | PICTORY | Peech | VEED.IO | Twelve Labs | synthesia | AI STUDIOS by DEEPBRAIN AI | Sora
captions | descript | Graswald | tavus | stability.ai | quso.ai | Opus Clip | LUMA AI
elai. | Maverick | Steve AI | Colossyan | lumen5 | Firework | Vikit.ai | Aive

3D

London Dynamics | FLIX STOCK | DOLY.APP
KAEDIM | INTERIOR AI | Hexa | solaya | omi
Backflip AI | EMPERIA | BIGTHINX | LALALAND | REACTIVE REALITY

Music

Epidemic Sound | soundful | splice | mirelo.ai | AiMi+ | Mubert

Bringing AI to Content Creation

It would be incorrect to say that AI applied to content creation is a new trend. AI-driven content creation has become a commodity and is widely adopted by consumers. **What is new is that adoption has now progressed from B2C to B2B.** Photoroom is an excellent example: the app initially focused on a B2C approach before targeting small businesses (like thrift stores), and now it's utilized by enterprise clients such as Netflix, Shopify, and Warner Bros.

The trends we're following include:

1. Personalization: B2B adoption requires a personalized approach tailored to each brand's environment through training models on brand's content. Retailers are increasingly leveraging proprietary data with GenAI to ensure that generated content is highly specific and relevant to their products and customer base. In the future, we can also envision this approach being personalized for each customer, with images and content on each site generated in real-time based on the user.

2. 3D & AR: The integration of artificial intelligence with augmented reality is transforming the way people shop by offering deeply engaging and interactive experiences. AI-driven virtual try-on tools enable shoppers to visualize how items such as apparel, cosmetics, or furniture would appear on themselves or within their living spaces prior to buying. This innovation not only boosts consumer confidence in their choices, but also addresses a major challenge for retailers by minimizing product returns.

Companies to watch out for

EMPERIA
Raised +10m

PRESTI
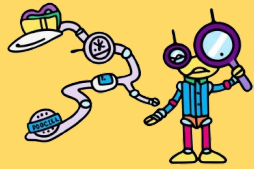**Raised +3m**

Poolday.ai
nd

VEED.IO
Raised $35m

Poolday.ai

*"AI is revolutionizing content creation by democratizing ultra-personalization. What was once reserved for large corporations is now accessible to small businesses, giving them the tools to compete at scale, test quickly, and adapt with unprecedented precision." **Alexei Chemenda, Founder & CEO @Poolday***
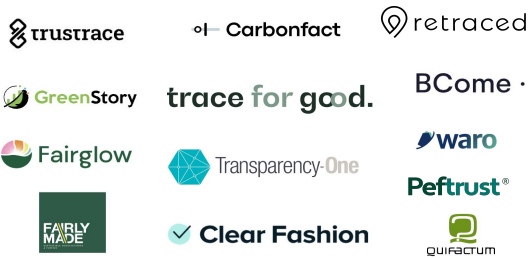
10

Traceability in supply chains

Traceability for sustainable and resilient supply chains

daphni

Sustainability and compliance softwares

Verticalized players

Apparel, Fashion & Cosmetics

trustrace · Carbonfact · retraced

GreenStory · trace for good. · BCome ·

Fairglow · Transparency-One · waro

FAIRLY MADE · Clear Fashion · Peftrust® · Quifactum

Food Traceability

carbonMaps · CONNECTING FOOD

TRACKLAB · climatiq · Karbon

foodpilot

CarbonCloud · inoqo

mondra · HowGood · ROOT

Mobility

ALTAROAD · MINESPIDER® · Circulor

Manufacturing

STEELTRACE · Circular

Generalist players

finboot · PeerLedger · givvable Data with impact · ANTARES VISION GROUP LIFE SCIENCE · ownest · Trans—chain BLOCKCHAIN SOLUTIONS

EVERLEDGER · BanQu · Watershed · carbmee · TILKAL · Sourcemap · TE-FOOD

NanoJClean · PLANET→FWD · Emitwise

Traceability for sustainable and resilient supply chains

daphni

We've observed a great momentum in the space due to stricter ESG regulations and escalating consumer demand for transparency. Traceability is now an essential feature for modern supply chains, helping brands & retailers meet regulatory requirements, manage risks, and ensure product quality, while building consumer trust.

Advanced traceability management softwares address these challenges by integrating real-time data collection, predictive analytics, and workflow automation, enabling brands to monitor environmental impacts. First, brands can assess suppliers and materials and then compare and identify potential alternatives with lower footprints across all the life cycle phases.

As we look toward 2025, we believe the key challenge ahead lies in efficiently evaluating the environmental impact of individual products at scale. How can large-scale LCAs be conducted without privileged access to primary data? Solving this data challenge will be crucial in building more robust reporting. Some levers could be:

Simplify Data Collection	Prioritize Focus Areas	User-friendly tools	Structured Partnerships

Companies to watch out for

carbonMaps 🇫🇷 — **Sustainability Platform for the Food Industry**

Fairglow 🇫🇷 — **Enabling companies to trace, the impact of their cosmetic's**

MINESPIDER® 🇨🇭 — **Leading traceability platform for mining and raw materials tracking**

carbonMaps

"While it's true that stricter ESG regulations have lit the spark for companies to invest more into traceability and granular measurements, the most engaged and forward-thinking companies see beyond compliance. They recognize these sustainability efforts and practices as a strategic opportunity to build more resilient supply chains and differentiate themselves in the market. We're seeing this shift more and more with our clients, and we're thrilled to support them every step of the way." Patrick Asdaghi, Co-Founder & CEO @Carbon Maps

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B Corporation