

AFTER THE SHELF

Why Africa is leapfrogging
the world in retail media

A dentsu Africa thought leadership white paper

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Impact brief

Africa is not catching up; it is democratising commerce. By 2027 the continent will be one of the most digitally accelerated and mobile native retail environments anywhere in the world.

While mature economies debate cookie loss and omnichannel complexity, African shoppers have already evolved into a mobile first, identity rich, conversational commerce economy where mobile payments, marketplaces and WhatsApp drive the shift.

South Africa is expected to pass the ten percent ecommerce penetration mark by mid-2026, placing it alongside the world's most digitally mature retail economies. At the same time, African marketplaces are transforming into media ecosystems, where logged in audiences, structured advertising products and closed loop measurement are fast becoming standard.

Africa's hybrid commerce system, spanning mobile money, informal trade, formal retail and social commerce, means its retail media evolution will not mirror Europe or the United States. To reach scale, the continent requires a unified identity foundation capable of connecting fragmented data signals and shopper touchpoints.

Dentsu has already created this advantage with COPO and Merkury, which allow behaviour, identity and outcomes to be viewed in one African frame.

Africa is not following the global retail media playbook. It is writing the next version.

What is new and why it matters for African marketers

Africa's retail environment is structurally different.

African shoppers are mobile first. Many skipped desktop commerce entirely and instead uses WhatsApp as the primary interface for discovery, negotiation, stock confirmation, payment, delivery and customer service.

Commerce spans environments rarely found together in mature economies. Informal traders, community hubs, social networks, mobile money operators and modern retail stores, all form part of the same shopper journey. Mobile native consumers move fluidly across them, creating a dynamic but structurally fragmented environment.

Retailers and marketplaces hold strong datasets, but completeness varies significantly across markets and categories. This creates a structural need for an identity system built for mobile first economies. COPO powered by Mercurry fills this gap by linking behavioural signals from retail, marketplaces, telcos and social commerce into one verified African view.



The shopper journey is fragmented and identity is incomplete

Marketplaces such as Jumia, Konga and Masoko are driving retail media innovation with logged in audiences and integrated payment systems. However, shopper journeys remain split across devices, platforms and fulfilment channels, limiting the ability to unify behavioural data.

Informal trade widens the blind spot further. A large share of FMCG and household purchases still happens outside formal retail, meaning many shopper signals never enter retailer owned measurement systems. Retail media networks reveal only part of the picture and may misrepresent true demand when used without broader context.

Solving this requires a people-based identity layer built for Africa's hybrid reality. COPO and Merkury are engineered for exactly this environment.

Stores are becoming media environments

African retailers are rapidly digitising stores with digital shelf labels, in store screens, scan and go technology, personalised loyalty offers and integrated mobile experiences. Evidence shows that stores and ecommerce environments are among the most trusted and preferred places for consumers to encounter advertising.

Yet, store level signals are rarely connected to marketplace activity, mobile commerce or WhatsApp journeys. This leads to fragmented measurement and missed insights, at the point where purchase decisions are made.



Solving the identity gap: Introducing COPO and Merkury

COPO, your consumer in your pocket

What COPO is

COPO is dentsu Africa's people-based identity foundation that connects retail, marketplace, telco and mobile behaviour into a **verified view of more than 140 million African consumers**.

What COPO does

COPO puts your consumer in your pocket. Brands can test ideas, creative routes, product propositions and campaigns with real households before going live. COPO shows how people move across WhatsApp, informal trade, mobile money and modern retail, providing a grounded view of actual African behaviour.

Why no one else has this

COPO is built for Africa's hybrid commerce system. Its identity layer is strengthened by independent partnerships, including telco networks that offer cross market **visibility no retailer or marketplace can match**.

Why COPO solves the problem

Africa does not lack data, it lacks connected identity. COPO closes that gap. It turns fragmented signals into clarity and enables evidence-based decision making in markets where assumptions and guesswork are costly.





MERKURY

Powered by Telco data

With a verified pool of
over **20 million active users**
in **South Africa**

Merkury, verification that makes Africa measurable

What Merkury is

Merkury is the verification engine behind COPO. It enriches and validates identity across more than 140 million African profiles, ensuring accuracy, independence and consistency.

What Merkury does

Merkury connects store data, marketplace behaviour, telco signals and mobile journeys into one verified household view. It enables outcome-based measurement, incrementality analysis and cross channel performance reporting that is not dependent on any single walled garden.

Why no one else has this

Most global identity systems rely on cookies, devices or clean retailer logs. Africa does not. Merkury is engineered for shared devices, informal trade and inconsistent logged in data, and strengthened by telco partnerships that competitors simply cannot replicate.

Why Merkury solves the problem

African marketers need verified truth, not impressions. Merkury provides independent identity and transparent measurement in environments where platform reporting cannot always be audited. It makes Africa's complexity measurable.



This is where Merkurs and COPO complete the story

Africa's growth requires a people-based identity layer capable of unifying fragmented signals. COPO, powered by Merkurs, builds a verified, privacy safe African identity graph that integrates data from retailers, marketplaces, social media and WhatsApp while remaining independent of any single walled garden.

This enables marketers to see:

- households, not channels
- behaviour, not impressions
- incremental outcomes, not clicks

Merkurs fills gaps in retailer data, connects store and online journeys, and creates a foundation for transparent measurement in markets where reporting standards vary widely.

In Africa, the identity gap becomes the advantage when the right infrastructure is in place.



Implications for brands and quick actions for this quarter

Build an African identity spine

Fragmented datasets are a defining feature of African commerce. A people-based identity graph enables consistent planning and integrated measurement.

Quick action

Run an identity audit and generate an audience blueprint for two priority markets.

Prioritise the right retail partners per market

Different markets behave differently. Growth comes from depth, not breadth.

Quick action

Choose one core retailer and one core marketplace per market and focus capability building around them.

Make WhatsApp part of the retail media ecosystem

WhatsApp is the conversion engine of African commerce.

Quick action

Add click to WhatsApp pathways across retail media and social campaigns with structured conversational flows.

Build total commerce, not siloed activity

Connect retail media, social, search, marketplaces and WhatsApp using dentsu frameworks and identity systems.

Quick action

Run a three-channel commerce pilot with shared audiences and unified KPIs.

Measure outcomes, not impressions

Retail media must show penetration, basket expansion and repeat purchase.

Quick action

Define a five KPI retail media scorecard and apply it consistently.

Risks, gaps and what to watch next

Retailer and marketplace transparency varies widely, and many operate closed reporting environments where impressions and conversions cannot be independently verified. Over concentration of spend on a few marketplaces exposes brands to algorithm changes, fulfilment issues and policy shifts.

Regulation around data sovereignty and advertising claims is tightening across Africa. Informal retail remains a major blind spot for measurement. Macroeconomic volatility in inflation, currency fluctuation and supply chain pressure affects demand and basket composition.

These risks increase the importance of independent identity and measurement. COPO and Merkury provide this foundation. Where platform opacity grows, dentsu's advantage becomes stronger.



Ready to unlock new retail growth?

Connect with our team at communications.africa@dentsu.com and let's shape the future of retail together.