

# CATEGORY, STRATEGY & INSIGHT

## Roundtable Summary

Kopparberg, Leeds · 16 April 2026 · Part of the RTG Insight to Impact Series

Feeding into the Equity Exchange · All contributions anonymised

This document captures the key themes, insights and provocations from the first RTG Category, Strategy & Insight roundtable. All contributions are anonymised and attributed to the session, not individuals or brands. The session was hosted at Kopparberg, Leeds, and brought together category professionals from across the drinks industry.

*“Resources are not strong or weak merely because they exist. Their value depends on how they are being managed, controlled and used.”*

Thompson, 1990

## 1. The State of Category Management in the UK

Participants were frank about the challenges facing the category function, from a lack of formal training to structural invisibility at senior levels. That conversation is best understood in the context of what category management is actually for.

### Category Management (CMA, 2025)

*“Trading partners collaborating to determine the point of optimisation in pricing, promotion, shelving, and assortment to maximise profitability and shopper satisfaction.”*

This represents a deliberate movement away from brand-centric practices, away from selling as much of what you have, wherever you can, towards retailers and manufacturers working together to create and manage strategies for specific product categories.

The roundtable explored how far the profession has drifted from this founding clarity, and what it will take to reclaim it.

- Category management is approximately 46 years old, yet there remains almost no formal UK training infrastructure outside of limited offerings. Proprietary programmes at the largest businesses mean that where training does exist, everyone follows the same framework, creating a significant diversity-of-thought problem.
- Thought diversity and breadth of experience were celebrated as a genuine strength. Curiosity and commercial acuity matter far more than formal category credentials.
- Category has historically been described internally as 'the charting service', 'the numbers' or 'colouring in'. This is language that signals an ongoing visibility and credibility problem the profession must actively address.

- The US category function was cited as significantly more advanced in industry standing, with the Category Management Association (CMA) driving professional recognition at a level the UK has yet to match.

*"Category has the data, the consumer understanding, and the commercial lens. If it isn't yet shaping the future of the drinks industry as powerfully as it could, whose responsibility is it to drive that change?"*

## The AI Question

AI generated substantial discussion, with a clear consensus emerging. Used well, AI is an opportunity, not a threat. The risk is not that AI replaces category managers, but that senior leaders who misunderstand the function believe it can.

- AI can replicate data processing and chart generation. It cannot replicate the human judgment required to notice a shopper pausing at a fixture, or feel the tension in a room when a buyer reads a recommendation. That 'eyebrow raise' insight remains distinctly human.
- AI is only as good as the prompt. Two people asking the same question in slightly different ways receive different answers. The insight layer, the 'so what', cannot be automated.
- The real risk is that if enough decision makers believe AI can do what a good category team does, the function will be squeezed. This is not because AI actually can replace it, but because the function hasn't made its value visible enough.
- The opportunity is that human intuition combined with AI-enhanced analysis could make category more powerful than ever. The goal is human plus machine learning, not one replacing the other.

*"Category is at risk not because of AI, but because of people's perceptions of what AI can do, and what they believe category does."*

## 2. Storytelling, Trust & the Commercial Relationship

A recurring theme throughout the session was the tension between category's role as an objective, impartial function, and the commercial pressures that can compromise that objectivity.

### The Power of Storytelling

A strong point of alignment was that category professionals are not just data people. They are meaning-makers. The human instinct that connects seemingly contradictory behaviours, is something AI alone cannot replicate. Curiosity came through as a defining trait of great category managers. The role is as much about interpretation, storytelling and perspective as it is about analysis.

- You are five times more likely to remember a story than a fact. Category professionals who lead with data alone are leaving their most powerful tool unused.
- Two people can look at the same data point and tell entirely different stories. 'Nearly 40% of people will definitely buy this product' is the same number as '62% are unlikely to buy it'. The story is everything.
- Retailers have seen all the Kantar and Nielsen charts. They want to know the 'So What?' Category teams that can deliver that cut through the noise.
- A great category manager doesn't just tell the story. They read the room and ensure it lands. Nancy Duarte's concept of resonance captures this perfectly. If the audience isn't tuned in, the bell rings and nobody hears it. Resonate is recommended reading for anyone in category.

*"The best category people know their value as storytellers"*

### Trust as the Core Currency

- Trust is the foundational asset of the category function. The moment a retailer discovers that a category team's recommendations have been shaped by their commercial team, the relationship is damaged, often permanently.
- This creates a real structural tension for smaller businesses where one person holds both the category and commercial responsibility. Category is harder to do cleanly when you're also accountable for the listing.
- Challenger brands were encouraged to lean into this. The fact that you have nothing to hide is a competitive advantage. Honesty and impartiality are more compelling to a retailer than a polished story built around brand bias.

*"Protect your trust, because that trust is golden. I've had commercial people ask me to trash a competitor brand in my category work. That's where the moral element matters."*

## 3. Gender, Career Progression & the Leadership Gap

One of the most powerful conversations centred on why category, a function well-represented by women at analyst, executive and manager level, loses women as it moves towards senior and board level.

- Category career pathways are unclear and often end not with progression, but with sideways moves into commercial roles, often better remunerated and more visible, but leaving the function behind.
- Senior commercial managers are regularly encouraged to 'do a stint in category' for breadth of experience, then return to commercial at a higher level. This takes the growth opportunity from someone who has built their career in category.

- There is a credible question about unconscious bias. Senior category women are rarely encouraged to step across into senior commercial roles at the same rate. When they do, it is often positioned as 'finally escaping category'.
- Women in the room reflected on a well-documented pattern. Women only apply for roles when they meet 100% of the criteria. Men apply when they meet far less. Category has suffered partly because its practitioners, many of them women, have been 'cracking on' while others shout louder about less.
- The group reframed this. It is not that category professionals have been reluctant to self-promote. It is that other people have been shouting louder. The answer is not to become those people. It is to make the work impossible to ignore.

*"Women only apply for roles when they can do 100% of what's asked."*

## Reporting Line Roulette

- Multiple participants had never had a manager with a category background. Category teams have sat under Finance, Sales, Supply Chain, functions that don't understand the work and can't stretch or advocate for the people doing it.
- Without category experience at Exec or Board level, the function will always struggle to make the case for itself, because the person who should be making it doesn't exist in the room.

## 4. Innovation, Agility & the Challenger Advantage

Category managers, the group agreed, are better positioned to lead on innovation than almost any other function, yet many don't claim that space.

- If Henry Ford had asked customers what they wanted, they would have said faster horses. Category managers understand why those faster horses are valuable in driving category growth. Backing a number of 'faster horses' allows some risk profile on more disruptive innovation.
- Challenger brands cannot compete with major players' data budgets, but they can compete on the 'so what', the agility of their insight, and the honesty of their category story. A focus group with real shoppers can outperform a commissioned study.
- GLP-1 medications, protein trends, Buzz Balls are examples of what may not have been predicted by an AI model working from historical data. Real humans watching real behaviour is where the next big category story begins.
- The two-stream innovation pipeline is now a reality: the three-year NPD plan, alongside a twelve-to-sixteen week 'in and out' track for trend-responsive products. Category can bridge both, if it's given the seat to do so.

*"You need to go and watch actual human behaviour. You can learn a lot from graphs but you learn lot more standing in a store on Easter Thursday watching people shop."*

## 5. What Good Category Culture Looks Like

The session closed with a provocation: what would a category function built from scratch look like today, and what needs to change to make the drinks industry a place where category talent is developed, valued and retained?

### What the room wished someone had told them earlier:

- Get mentors - lots of them, from different functions and career stages.
- Ask 'so what?' of every chart and every data point, relentlessly.
- Back yourself. Your value is real. Stop waiting for someone else to recognise it.
- Get out of the building. Watch real people shop. The data will almost always confirm what you already suspected, but you need to have suspected it first.
- Find your tribe. The validation that comes from a room of people is worth more than any textbook.
- Be okay with failing. The function was built by people willing to try things that might not work.
- Don't spend years being the person you think others want. Know your purpose, and live it.

### What the drinks industry needs to change:

- Improve category's reputation as a career destination, not a stepping stone or somewhere you 'escape' from.
- Align KPIs across category, commercial and marketing so tensions are structural, not personal. The group highlighted a telling example: a brand celebrating 5% growth as a win, while the category is growing at 25%, means you're actually losing ground, but misaligned metrics make that invisible.
- Hire people from outside the industry. You don't need to drink beer to understand who buys beer. Be a people expert, not a subject expert.
- Make it more fun. Category is genuinely exciting. It needs to show that face to the world.
- Build cross-category, genuinely collaborative events. The whole category grows when everyone plays better.

*"Category has always had the power. The job now is to make that power impossible to ignore."*

## Key Takeaways for the Equity Exchange

- ◆ Category management has a limited, meaningful UK training infrastructure.
- ◆ Trust and impartiality are the category function's most valuable assets, and the most easily destroyed.
- ◆ The gender progression gap in category is real, structural and under-discussed. It deserves dedicated attention.
- ◆ AI is an opportunity, not a threat, but only if category makes its human value impossible to ignore first.
- ◆ Challenger brands can compete on insight agility and human truth. Data budgets are not the whole game.
- ◆ Category professionals must own their own narrative. No one is going to give category a seat at the table, the function has to pull up its own chair.

**This is the first in an ongoing series of RTG roundtables.**

Future sessions will cover supply chain, operations, marketing and more.

To get involved or share a reflection for the Equity Exchange: [hello@raisingtheglass.co.uk](mailto:hello@raisingtheglass.co.uk)