

eB2B Playbook

Introducing AI in Wholesale

How getting to grips with the basics of AI can help wholesalers achieve greater ROI and productivity



hello...

... and welcome to the latest in our eB2B Playbook series, brought to you by Mars Wrigley and b2b.store. This brochure is focused on one of the hottest topics currently, artificial intelligence (AI), and how its impact is being felt by wholesalers.

Any conversation about digital usage in the sector almost inevitably switches to AI and almost as predictably, most people end up conceding they're unclear what it means to them and how to prepare. So naturally, it makes sense to help clear up those uncertainties in this guide and give you some direction.

Over the coming pages, we provide a whistle-stop tour across the key AI talking points, what you need to know and how that's being applied to the food and drink wholesale channel.

The simple reality is that regardless of the sort of business yours is, you need to be ready for the changes AI tools are bringing to the way we work – whether that's aiming to make significant business gains or simply avoiding the new risks AI potentially poses if you don't do anything.

Ultimately, when used correctly, AI technology is a brilliant way to help elevate businesses in the wholesale industry and is far more practical and far less intimidating than it might seem. So armed with information on the essentials covered in this brochure, you'll be ready to help your business make the next step.

We're always here to talk in more detail about anything that comes up in the brochure, so please get in touch with us to discuss how to make the most of the opportunities ahead.

Thanks,

Lauren Johnson

Lauren Johnson

Head of Impulse eCommerce, Mars Wrigley

Rob Mannion

Rob Mannion

CEO, b2b.store

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AI in B2B: A growing trend

It's the technology on everybody's lips and while it's still early days, there are strong indications that using AI tools can make a big difference



\$50.6bn

the projected figure the market for AI in the global food & beverage sector is expected to reach by 2030***

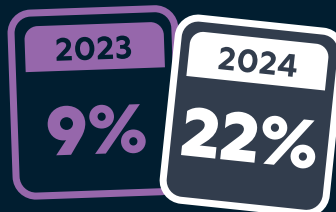


£23.9bn

revenue created by AI in the UK, with £11.8bn in gross value added**



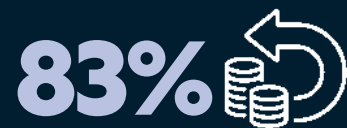
on average saved by the UK workforce every year if they use AI for administrative tasks, according to a Google study



9% of UK businesses had adopted AI in their operations in 2023, rising to 22% by the end of 2024, highlighting the speed of adoption*



in sales productivity and 10-15% reduction in sales costs reported when companies use AI-powered sales tools (McKinsey)



of companies that purchased an AI solution reported a positive return on investment (G2)



41%

of respondents saw a cost saving of 10-19% after implementing AI solutions (InData Labs)

SOURCES: *ONS, March 2025 **Artificial Intelligence sector study 2024. gov.uk Sept 2025 ***BCC Research, November 2025

What even is AI?

AI technology isn't just for tech whizzes, it's something that's touching all our lives – so this is what wholesalers need to know to be up to speed

For many people, the mention of artificial intelligence (AI) conjures up thoughts of The Terminator or the virtual crew members aboard Red Dwarf. Well, until a few years ago, anyway.

Now it's hard to avoid mention of AI technology. Since the launch of ChatGPT in 2022, talk about virtual assistants and using them to help us carry out tasks has become increasingly loud. And as the standard of the tools at our disposal has improved, the volume of the debate over what they should – and shouldn't – be used for now and in the future has also been turned up.

What does sometimes get lost in those conversations is what AI is and what it can do to help today's workforce, whatever industry they're in.

EFFECTIVE

In the same way the internet provided the world with a raft of new tools to help us be more efficient and productive, such as email, online shopping and the ability to research almost everything, AI offers a similar advancement. In essence, it has the potential to make many of the tasks we already use technology to complete even quicker and, in

some instances, more effective.

At its core, AI is technology that uses learned knowledge to spot patterns, answer questions and make predictions. Commonly, humans direct the AI assistant to carry out any number of prompted tasks, including analysis of data, critiquing documents or creating text or images – whatever a user asks for, AI does.

SMARTER

The clever bit is that as AI tools, such as ChatGPT or Gemini, complete more of these tasks and receive more human prompts, they learn from them and the patterns they see, making them smarter and the outputs better. This is known as generative AI.

As the technology and people's confidence using it grows, the next phase is what's called agentic AI, which are systems that don't just answer questions but also take actions to complete tasks on somebody's behalf.

This is where AI can support jobs by performing repetitive tasks and reducing admin for certain





QUICK-FIRE AI GLOSSARY

job roles, therefore giving human employees more time to do the things they do best.

For wholesalers, that could mean anything from better sales forecasts and stock control to faster admin and smoother communications.

This development is what we'll be seeing more of in coming years as humans in all roles use the power of AI to fill skills gaps and be more productive, giving AI adopters the edge over the competition.



Artificial Intelligence (AI)

Technology that normally needs human intelligence, such as spotting patterns, answering questions and making predictions

Machine learning

A type of AI where systems learn from data and improve over time, instead of being given step-by-step instructions

Generative AI

AI that learns and can create new content, such as copy, images or product descriptions, rather than just analysing existing data

Large language model (LLM)

The most well-known type of generative AI, used for tools such as ChatGPT. This is trained on huge amounts of text so it can understand and generate human-like language.

Prompt

The question or instruction you type into an AI tool to get an answer or response back. How to ask these in the correct way will dictate the quality of the response.

Agentic AI

AI systems that don't just answer questions, but also take actions on your behalf to complete a task.

Chatbot

A computer programme that can have conversations with people via text or voice, often used on websites or by call centres for customer service or order queries.

Data

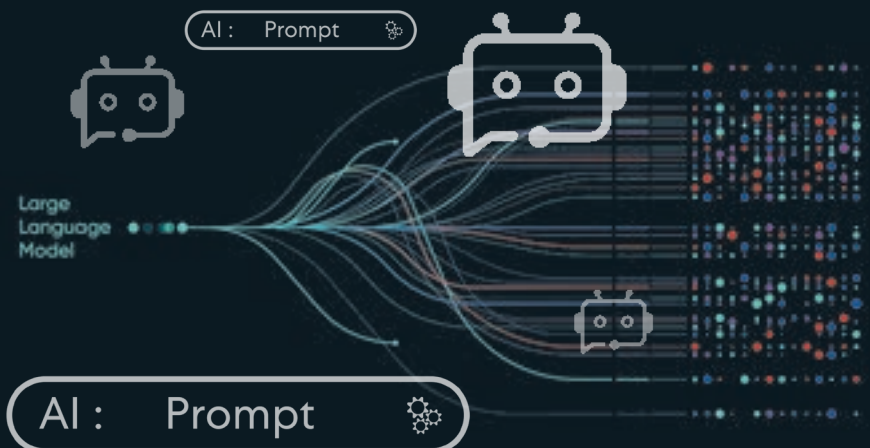
The information an AI learns from. Training data is used to teach an AI system how to recognise patterns and help them predict future demand or carry out tasks.

Hallucinate

The term used to describe when AI makes false statements to fill knowledge or skills gap in order to fulfil the prompt.

Automation

Using technology to carry out repetitive tasks automatically, such as sending order confirmations or chasing invoices. This term has been around for years, but is now heavily associated with AI.



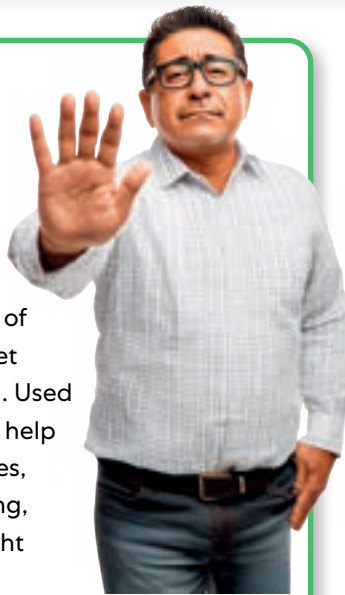
AI myth buster

The common preconceptions about the latest tech boom among wholesalers and why they're not quite on the money



AI can't help wholesalers

No industry is immune from the benefits of AI, it's merely about applying it in the right way. With a heavy physical reliance in the sector, there are parts of a process that will always solely be the realm of human effort, but AI can be an asset in areas that are more office-based. Used in the right way, AI technology can help to improve forecasting models, sales, customer service and route planning, among other things (see pages eight and nine for more).



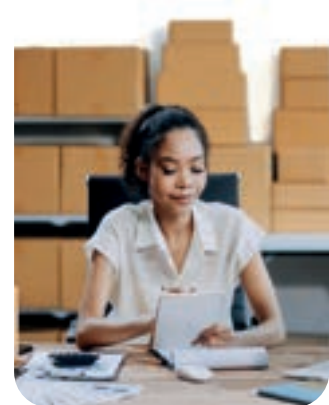
AI is only for the big companies, not us

It's true that some technology does benefit bigger budgets more, but it's not the case with this. AI features are being built into everyday software to support with office tasks, enhance ERP experiences and to help you sell more online. One of AI's biggest roles is filling skills gaps, such as data analysis or content creation, meaning smaller wholesalers can easily step up a level without having to hire a team of specialists.

AI is going to take people's jobs



Whenever a new technology emerges that promises to change the way we work, it always has its doomsayers – and when the negative headlines gather, it's easy to pull up the drawbridge. The reality is that AI isn't taking people's jobs in just the same way personal computers or the internet didn't, although it will replace some repetitive tasks that will mean some roles will change as a result.



We don't need AI, my employees know best



Your employees definitely know best, but it won't stop them benefitting from AI tools. Using AI isn't about replacing human knowledge, it's about supporting and enhancing it by automating time-consuming tasks and spotting patterns that can drive even better results – leaving your employees armed with what they need to do more of what they do best: focusing on selling and providing great service.

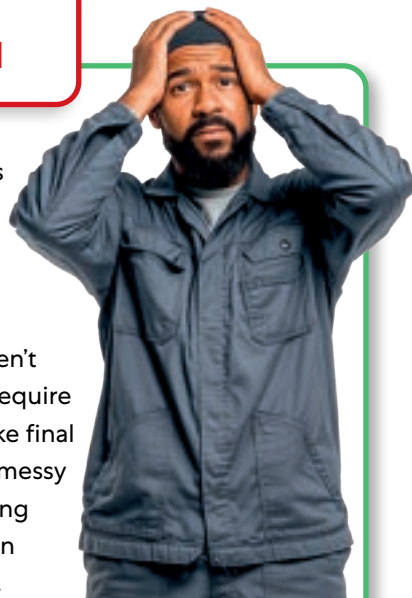
AI is just a trend, we'll wait to see what happens



Don't expect AI to go out of fashion any time soon, just look at the number of tools already being added to everyday software. There are now several easily implementable ways for businesses to improve their productivity and increase their ROI simply by swatting up on AI, so sitting still provides the chance for your competitors to get ahead by mastering the technology first.

There are too many mistakes to bother using AI

AI does make occasional mistakes (so do humans, unfortunately) and shouldn't be blindly followed without checking its work, even the owners of this technology agree. But AI tools aren't made to be set and forget, they require human craft and expertise to make final decisions, yet they can unclutter messy data and speed up admin, planning and forecasting if a human stays in control – regardless of any errors.



THE REAL TRUTH: Wholesalers can't afford to ignore AI

While sitting and waiting to see how some technology will impact the wholesale sector makes sense, AI usage is so widespread, now isn't the time to be caught sleeping. In fact, sitting and doing nothing is far riskier for your business.

Whether your leadership team has formally approved using AI tools or not, it's almost guaranteed that some employees are, with ChatGPT, Copilot and Gemini attracting millions of users each day. While the technology itself isn't at fault, people can freely upload sensitive business information and data when left unmonitored.

PROTECTED

If employees are using free versions of AI tools, this data isn't protected in a safe business workspace and can be leaked on to the internet for others to find or surface with their own AI queries. And if that extends to your customers' personal data, your business could then be in breach of GDPR.

In order to ensure cybersecurity, it's now crucial for businesses to formalise AI usage with new policies and to provide official business accounts for AI tools that offer privacy and compliance controls so employees can upload data with confidence that it won't be shared anywhere else.

Before even considering the commercial impact of ignoring AI, your business must ensure it's not leaving itself vulnerable.



How can wholesalers use AI?



The most common ways to quickly and easily introduce new tools into your business with maximum returns

DATA ANALYSIS

AI quickly analyses even the messiest data to uncover patterns and generate insights that normally require a specialist to find. Perfect for time-poor wholesalers wanting to make forecasting, gap analysis, sales reporting and joint business planning more efficient. **WHOLESALER IMPACT: Help teams make faster, more confident decisions with sharper data analysis.**

TELESALES AND CUSTOMER SERVICE

AI chatbots and voice agents expand a wholesaler's customer service team by answering routine queries and routing others to the correct teams. **IMPACT: Reduce admin so human teams can handle complex queries.**

MARKETING SUPPORT

AI tools can be used like a marketing assistant, helping to create and refine written content and visual assets quickly. Great for functional needs, such as product descriptions, WhatsApp and email promotions, or social posts. **WHOLESALER IMPACT: Saves time and improves consistency for time-poor wholesalers.**

WEBSITE TOOLS

We've been using AI features to sell online for a while. Pre-populated shopping lists, personalised product suggestions and improved search results are common on consumer eCommerce, with wholesalers adding similar features on their sites. **WHOLESALER IMPACT: Bigger baskets and fewer drop-offs.**

ROUTE PLANNING

AI-powered routing tools instantly plan delivery journeys more efficiently to consider drop locations, fuel use and vehicle capacity. **IMPACT: reduction in fuel costs and CO₂ emissions, and greater efficiency for drivers and office staff.**

COMPLIANCE

AI can quickly assess images from store visits or sent by retailers to check whether stock is displayed correctly, promotions are live or planograms have been followed. Compliance is a common bugbear for wholesalers, so using AI for compliance can quickly flag issues and help teams prioritise follow-ups. **IMPACT: Reduce manual work and identify issues quicker.**

STOCK AND INVENTORY OPTIMISATION

Setting up AI alerts to flag excess stock, predict shortages and highlight unusual buying patterns can bolster a wholesaler's armoury, allowing them to spot issues before they arise. **WHOLESALE IMPACT: AI analysis can help to identify range gaps, improve product mix and reduce waste by minimising investment in slow-moving stock and keep availability high.**

ADMIN SUPPORT

AI can automate routine administrative tasks, such as generating invoices, cleaning spreadsheets and drafting reports, even summarising long emails and documents. AI tools handle repetitive work quickly and accurately. **IMPACT: Give staff more time to focus on high-value tasks and increase productivity.**

Find out how some wholesalers are already using AI in their business on pages 12 and 13



AI BUSINESS readiness checklist

Your six-point plan to make sure your business is structured
and secure to handle AI usage across every department

01 | PUT AN AI POLICY IN PLACE

The use of AI is a big shift from the most common tech usage in any business, so current IT policies and procedures are unlikely to cover the new needs of AI. This can leave a company vulnerable to unregulated AI use if it's not addressed, even in instances where a business doesn't intend to immediately integrate new technologies into their operations. The use of free AI tools by employees without proper policies in place could see sensitive company data being shared into the open – or worse still, customers' personal information. Planned AI usage dictates the level new policies need to be, but with ISO42001 accreditation available to set a universal standard for AI management and new laws gradually being introduced globally, it's important to stay up to speed with what's going on.



02 | CREATE COMPANY AI ACCOUNTS

As mentioned in the previous point, the unregulated use of free AI tools by employees is a significant threat to companies. While policies and rules can help, the easiest move to stop this is by making company accounts available for staff, so they have a safe space to use AI tools and benefit from productivity gains. These company AI accounts are usually secure workspaces, where data inputted into it isn't used to train global models. They also provide consistency, are based on accrued company knowledge and mean sensitive data can be shared without risk of being leaked.

03 | EXPLORE WAYS AI CAN BE USED

The beauty of AI is that it can be used in a multitude of different ways to deliver tailored business results, it's not like software of the past where you're buying specific products. That means the first logical step for any business looking to use AI is to properly study where the biggest gains can be made to help drive greater ROI and productivity. Consider current process frustrations, skills gaps or time-consuming tasks that currently stop employees from achieving more as these will



provide a clear route to success. Bring in an AI expert or consultant who knows more about the possible solutions to help guide you to the best outcomes, then implement your AI plan.

04 | GET YOUR DATA IN ORDER

In a wholesale business, data is king, so getting it in a usable order so AI can quickly and easily use it to support what you're doing is key to quick and effective use. The fuller and more accurate picture of your business that you can provide to AI tools – such as customer, sales and product data – the more value it can provide. It's not just about quality of output that sorting your data helps with, it also ensures you're handling sensitive information correctly to stay on the right side of GDPR. Another important factor to consider is AI integration to your current systems to make the change in methods as seamless as possible.

05 | AI LEADERS TO SHARE LEARNINGS

For AI to be fully accepted and used as part of day-to-day operations, it requires a cultural shift as much as an operational one. This relies on bringing employees along on the ride, so appointing AI leaders across the business can help with this process. There is bound to be a level of uncertainty when it comes to AI, so leaders can help to inform colleagues and share cross-departmental learnings to normalise usage. This approach not only makes transition easier, but also uncovers new AI uses as teams find improved ways to add value to tasks. We'd recommend monthly check-ins initially as team get to grips with the tech.

06 | KEEP UP WITH THE LATEST AI PROGRESS

Technology has always moved quickly, but the advent of AI has only served to speed this up, so don't assume that what you know now is enough in six months' time. Businesses need to stay aware of developments to remain ahead of the competition and standing still could mean that others find an edge you're now even aware of yet. That can be a difficult task for a wholesaler with so many other priorities to focus on, so finding an AI consultant who can provide you with short, digestible updates that are relevant to the industry you're in could make all the difference. Find a partner to help support with this.



The early ADOPTERS

The wholesalers and buying groups already making a splash with AI activity



Simon Hannah

CEO

JW FILSHILL



The most important learning for us at Filshill over the past 12 months has been to embed AI as a culture shift across the business, not treat it as an IT or marketing project.

Culture is the responsibility of the CEO in every business, hence why AI sits within my accountabilities in order for us to make that culture shift towards a digitised world going from being AI curious to AI serious.

Seventy colleagues have completed a 10-week training course as a result, representing every department in the business.

Managers now deliver an AI project linked to their accountabilities every 90 days. We have had everything from forecasting accuracy projects (to assist our suppliers allocate forecasted stock for our business), HR policy bots for our colleagues, to a customer-facing bot called Vapora to help our customers navigate the recently implemented disposable vape ban legislation.

As our AI confidence builds, we have an exciting pipeline of projects for 2026 that will focus on efficiency, deep data analytics to optimise ranges, footfall, revenue, and profit for our customers using AI and machine learning. In 2026, we'll have a focus on Agentic AI to speed up processes within the business too.





Tom Gittins

JOINT MD
THE WHOLESAL GROUP



There are loads of way you can use AI to improve your business efficiencies, but we've chosen to invest in our own AI, called Jake AI.

The key thing is that there are guardrails, it can't hallucinate and is only given data from our business. It's about business intelligence, but totally locked on to what we're doing. We interrogate it and gain insights about our business, trying to find the opportunities and how to develop business with our suppliers and members that's specifically tailored to The Wholesale Group.

We started in sales, but we're finding our other departments are looking at how they can use AI to streamline their day-to-day business routines as well. It's really important

that as we use AI, we're all learning about how to use the tools and be more efficient.

It's like each of us having our own personal assistants. It frees you up from the mundane jobs and when you have ideas, you're asking it for results or to do some tasks, it allows you more time to do the fun stuff and the tasks that help our members and suppliers more – it's like having an extra person in the business.

In the future, all businesses need the ISO accreditations and the correct AI guardrails in place. When you use AI that's free, you're giving everyone your data and it's open to hallucination and telling you what it wants you to hear, so having a secure business solution is crucial.



Claire Taylor

DIGITAL MARKETING
MANAGER
UNITAS WHOLESAL



We started our AI Academy for members because we wanted to lead from the front. There are pockets of activity in the sector, many members knew they needed to take the next step and put AI in action, they just weren't sure where to begin. We're learning alongside everyone else too.

The academy allows members to learn how to prompt AI better, so we can help everyone in a wholesaler's business to reach the same level because there is a wide spectrum of people with different opinions and confidence levels with AI.

The academy teaches the basics, moving through the levels from basic prompting to creating custom GPTs and prototyping, research and data.

The next challenge is helping people know what to do next because there are so many AI tools out there and they're always being upgraded, so it's hard to keep up.

We've spoken about having a

bottom-up approach to AI in a business to have the biggest impact. It's the people with boots on the ground who need to be learning and spending time building and delivering AI solutions that genuinely work for them, rather than simply top-down initiatives.

For an AI journey to be successful in a business, there needs to be AI champions from each department so people are teaching each other and sharing ideas to bring everyone to a high standard.

We're all on the this AI journey and if we can raise the bar together, then it's good for the entire sector to work out where it will have the biggest impact.



Do try this one at home

Learn the best ways to prompt an AI tool to generate results that instantly help you

When it comes to using any AI tool, it really is the case that you get out what you put in. AI technology is built to follow instructions, so the prompt you give it has a critical bearing on the results you'll receive in return.

Luckily, there's an easy formula to optimise prompts and following it should help across the majority of tools. So whether you're already familiar with prompting AI software or have no idea where to start, it's quick and easy to sharpen up your skills to get the best responses.

The 30-second rules

- **Don't include any personal customer or business data into free AI tools because you risk leaking it into public-facing services.**
- Always provide context in your instructions. Just as with any brief, AI understanding is better when it fully grasps who you are, a target customer and what the aim of the output is.
- **Be specific with what you want. It seems obvious, but it's easy to forget. If you want an email, list of bullets, table of information, image or written copy, make sure it's in the prompt**
- Use simple English, don't overcomplicate sentences and keep it snappy.



Create the perfect prompt

- **AI tools all run from an initial prompt box that can instantly produce a wide range of results. This blank canvas can be daunting when presented with a flashing cursor and an empty white box.**
- Consider this to be the same as sending an email to a colleague when you have a task that needs completing (just without the human niceties). You can drop in attachments for context or information and write – or speak if you'd prefer – to tell it what you want.
- **This simple AI prompting formula will set you on your way to a good prompt and can be used for any basic task. The formula is:**
“Act as [role]. Context: [situation]. Task: [what you need]. Constraints: [tone/length]. Output: [format].”

TRY IT FOR YOURSELF

Here are three easy prompts that use the above formula, which can easily be added to a wholesaler's armoury. Give them a go and see what returns you get.

SUMMARISE A SPREADSHEET INTO A REPORT

What will it do? Turns raw data into a readable report with highlights, analysis of pros and cons, and actions

WHAT DO I SAY?

Act as: A wholesale trading analyst

Context: I'm a UK food and drink wholesaler. I've pasted a spreadsheet extract with the columns [explain what the data is about]. It covers the last [enter time period].

Task: Summarise what the data shows and produce a short weekly [insert purpose/audience] report.

Constraints: Keep it non-technical. Flag the five changes, three risks and three opportunities.

Output: Heading and bullet points, max 250 words, then a table that shows potential issues, likely causes and a recommended action.



SUMMARISE A LONG CUSTOMER EMAIL INTO ACTIONS

What will it do? Turns a messy email chain into a checklist and a customer-ready response



WHAT DO I SAY?

Act as: A customer service manager at a UK wholesaler

Context: I've pasted a customer email below

Task: Summarise what the customer is saying, identify the issues and turn it into a clear action plan for my team
Constraints: Be neutral and factual. Note any deadlines, risks (e.g. service failure) and missing information we need to request

Output: A three-sentence summary and an action list with a suggestion of who should complete it

CREATE CUSTOMER-FACING CONTENT TARGETING AN INDEPENDENT RETAILER

What will it do? Creates ready-to-send retailer comms that sound professional, not salesy

WHAT DO I SAY?

Act as: A marketing assistant for a small, independent food and drink wholesaler

Context: I'm writing a message to independent retailers. Offer details [insert product/deal], price [£], offer dates [from/to], minimum order [insert deal Ts&Cs]. Our tone is helpful and

friendly, not pushy or too salesy.

Task: Write a WhatsApp message and an email promoting this offer and encouraging orders.

Constraints: Keep it clear, no jargon, plain English. Include a strong subject line for the email and a short call to action.

Output: 1 WhatsApp message (max 60 words), one email (120-150 words) and three alternative subject lines.

Once you've mastered the prompt formula, try out your own requests depending on the AI tool's capabilities

AI resources for wholesalers

Want to get stuck into AI but have no idea where to start? Try these resources without the need for major investment or technical skills



Microsoft Copilot (Office 365)

AI built directly into software most wholesalers use: Outlook, Excel, Teams and Word. It's an easy way to familiarise yourself with AI with very little (if any) integration and speeds up writing emails, analysing spreadsheets, writing reports and summarising sales or meeting notes.

ChatGPT Business (Open AI)

Business-grade version of ChatGPT with privacy and admin controls to ensure data privacy. Great for drafting customer messages, catalogue copy, product descriptions, policy templates and consultancy.

Google Gemini for Workspace

AI built into Gmail, Docs and Sheets, allowing for support with planning, summarising documents and building quick presentations. Most people are already familiar with Google and its AI without even realising it due to its AI search functionality, so is a natural jump.

LinkedIn Learning: AI for Business courses

A suite of short, jargon-free training videos for beginners. A simple way to get basic AI knowledge for general usage and provide a good grounding before exploring more specialised training with an industry expert AI provider.

Gov.uk AI Guidance for UK businesses (updates regularly with new advice)

Straightforward and unbiased advice on responsible AI use, data protection, GDPR and risk management. A valuable resource for businesses wanting reassurance on compliance and best practice.

b2b.store

A B2B-focused digital business with built-in AI tools in its products that also offers tailored AI workshops and consultancy to help wholesalers and suppliers get a grasp of AI usage for their specific sector.

Want to find out more?

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