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Grassroots Research® Market Monitor

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Grid Scale Battery Expansion–US

Grassroots® conducted interviews with US based experts with knowledge of grid scale battery solutions to assess momentum, technology evolution, cost drivers, and bankability risks shaping battery storage deployment across US power markets. The work focused on how falling costs, faster deployment timelines, and rising demand for grid flexibility are accelerating adoption, while policy and supply chain constraints remain sources of uncertainty.

Momentum in grid scale battery storage is broad based. 100% of sources cited accelerating development activity, supported by improved economics, mature deployment expertise, and increasing need for peak capacity and solar integration. One source said, “Grid-scale battery storage is a good space to be in given the broad acceptance of the grid needing energy storage. This has grown over the past decade, and I expect it will continue to rise in the next decade. More energy resources are needed on the grid, and there is more unpredictability on when that load switches on and off. The market is broadly embracing energy storage as the way to manage reliability and put a cap on the prices consumers pay.

Among sources who commented on system duration, 100% said projects are shifting away from 1–2 hour configuration toward longer durations, with future builds increasingly targeting 6–8 hours as pricing improves. One source said the market is “definitely seeing 4 hour batteries as a minimum,” while noting that longer durations are appearing first in RFPs before reaching full deployment. Cost and timing pressures remain material, with 100% of sources who commented citing tariffs and supply chain constraints as key drivers of turnkey costs and lead times. One source described uncertainty around transformers, switches, and grid connection equipment as “the biggest challenge” over the past 6–12 months.

Resilience features are rising in prominence but are not uniformly valued. 67% of sources said grid forming inverters are now part of procurement discussions, though views diverged on their revenue relevance. A source said, “The architecture of the battery system has a natural resilience built into it. You have a collection of batteries behind a converter and several PCSs connected. It can fire on different circuits as needed. ”Bankability concerns were split, with 50% of sources citing supply chain volatility as the primary risk and another 50% emphasizing interconnection and transmission costs. Looking ahead, sources were constructive but cautious, with durability of growth viewed as strong while execution risk remains elevated.



As one source noted, “There is a dramatic need for capacity that can be brought online very quickly,” but delivery discipline and interconnection certainty will increasingly determine project viability.

When it comes to competition, Fluence was most mentioned by sources as a competitor to Tesla in the giga-scale segments, followed by BYD, CATL, and HiThium. Sources indicate Tesla competes strongly on price, as well as domestic fabrication and name recognition. “Tesla is one of the biggest OEMs with regard to brand recognition, holding 20-25% of market share. They have the advantage of domestic fabrication, other than that they still have the Chinese battery cells, but otherwise they are insulated from domestic fabrication limits. Three to four years ago, when battery prices were on the rise, supply chain was a much bigger constraint. That is not so much the case recently; you can place an order and get just-in-time shipping. With Tesla there is faster delivery, and you have the added customs costs.”

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Freight Brokers & AI Impact –US

Grassroots® interviewed decision makers at trucking companies to assess how artificial intelligence is influencing freight brokerage workflows and long term industry structure. According to sources, AI adoption today remains concentrated in automating routine brokerage functions with pricing, load matching, documentation, and exception monitoring seeing the most progress.

Fully autonomous, end to end brokerage workflows remain limited as many operational decisions still require judgment and experience. As one source explained, “AI is good at the mundane tasks, but you still need a person when things go sideways.” Views on the effectiveness of broker AI capabilities remain mixed. In terms of visibility, sources reported that more than half were unsure of the current AI capabilities at large brokers such as C.H. Robinson, Expeditors, and RXO, while the remainder generally described them as competitive.

Automation has improved efficiency in quoting and information flow, sources said, without eliminating the need for human oversight. According to sources, roughly three quarters are not considering agentic AI for brokerage workflows, citing uncertain ROI and operational readiness. Expectations for AI driven broker disintermediation remain restrained over the next 12–24 months.

Most sources anticipate minimal or modest increases in direct shipper to carrier transactions rather than a structural bypass of brokers. Core broker value areas, such as exception handling, liability management, compliance, and surge capacity, are widely viewed as hard to automate, sources said. Longer term disruption from autonomous trucking remains a watch point, but not an imminent threat. Most sources believe brokers will remain integral during a prolonged transition period due to operational complexity and regulatory uncertainty.

Agentic AI Shopping & Advertising

Grassroots® conducted interviews with US based brand advertising and marketing experts to assess how agentic AI shopping is reshaping media budget allocation, measurement, and creative and product data priorities. Impact is emerging earliest when customers are first learning about products. 43% said agentic tools are already influencing discovery and research, while another 43% said they are not yet seeing meaningful impact and 14% pointed to activity primarily during consideration.

Among sources seeing early impact in discovery and research, one said discovery is “outperforming the transactions phase” because agents still require a “human touch for checkout.” The same source cited declining traditional Google searches as product discovery increasingly shifts into AI driven surfaces. Budget implications are becoming clearer, with 100% of sources agreeing media spend will need to be reallocated as agentic shopping evolves and 75% expecting traditional search budgets to decline. One source said the budget “most at risk is non branded search on Google,” adding that some research queries moving into ChatGPT “would not have originated on Google.”

Rather than bidding for human attention, 50% of sources expect higher allocations toward product data and site infrastructure, while 38% anticipate increased spending on AI optimization, including Generative Engine Optimization. Measurement remains immature and fragmented. Among sources that commented, 83% said attribution from AI conversational surfaces is beginning to appear at very low levels, while 38% emphasized difficulty tying AI touchpoints to outcomes. One source said AI related traffic is “less than 1% of total traffic” but can convert at rates that “far exceed” direct traffic.

Cybersecurity Channel Spending Outlook - US



Grassroots® interviewed cybersecurity resellers, distributors, and consultants to assess spending trends, evolving priorities, and the impact of AI on security demand. Sources indicate cybersecurity spending momentum remains intact as organizations navigate evolving threat environments, regulatory pressure, and growing AI driven complexity.

Most sources expect security spending to rise over the next 12 months as organizations respond to evolving risks and regulatory pressures. AI has become the primary catalyst for both new investment and emerging threats, reshaping priorities across the security stack. The top security priorities have shifted decisively toward AI, zero trust, MDR/XDR, end-user training, cloud security, compliance, third-party risk, continuous monitoring, and SIEM, reflecting a broader push to harden organizational defenses.

According to sources, IT budgets were flat for 53% of clients in the second half of 2025, while 47% reported increases averaging roughly 3%. Despite modest growth, sources emphasized an intense focus on ROI and rationalization. One source described the environment directly: “Clients are trying not to spend, or to spend as little as possible, unless they’re forced by compliance.”

Sources suggest security spending expectations strengthen meaningfully looking ahead, even as overall IT budgets remain constrained. 74% of sources expect average client cybersecurity spending to rise over the next 12 months, while 26% anticipate flat budgets. Expected increases average roughly 7%, [illegible] requirements, regulatory mandates, and

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AI related exposure. One source noted, “There are more products companies now need just to be compliant, and that automatically pushes budgets higher.”

Artificial intelligence was identified as the dominant force reshaping cybersecurity priorities across the channel. In terms of ranking, AI now sits ahead of zero trust, MDR/XDR, end user training, cloud security, compliance, and continuous monitoring. While many priorities remain consistent year over year, sources highlighted growing urgency around AI governance and policy enforcement.

As one source explained, “AI is at the top of the list, mostly defensive, because the risks expand as usage expands.” Sources caution that AI is viewed as an enhancer of human capability, rather than a standalone solution. Channel partners emphasized that AI improves efficiency without eliminating the need for oversight. Automation helps analysts act faster and cover more ground, sources said, particularly for organizations without 24/7 teams. One source said, “AI is a tool for the analyst, it doesn’t replace the analyst.”

According to sources, sentiment around cybersecurity M&A is mixed but stable, with innovation generally holding up amid consolidation with just over half see no negative impact on innovation, and some believe scale improves roadmap execution. One source observed, “If a larger company buys a smaller one, the product can actually get better.” Pricing remains an area of watchfulness, sources said, though competition continues to restrain aggressive increases.

Sources conclude that cybersecurity demand remains structurally resilient, supported by regulation, AI adoption, and persistent threat exposure. Spending decisions are increasingly targeted rather than expansive. Vendors aligned with AI enabled monitoring, managed detection, and compliance driven use cases appear best positioned, sources noted, as buyers prioritize solutions with clear operational returns.

AI in Energy –US

Grassroots® interviewed energy companies actively deploying AI and generative AI to understand how adoption is translating into operational and financial outcomes. AI deployment has moved decisively from pilots to production, according to sources, with GenAI now embedded in day to day workflows across all participants. Projects expanded meaningfully in 2025 and are expected to remain elevated in 2026, sources indicated, reflecting proven ROI and competitive pressure. One source noted, “AI is moving at an unprecedented pace, and companies that delay adoption will be left behind.”

In the view of sources, machine learning and AI are being deployed to optimize production, accelerate discovery, improve predictive maintenance, and enhance safety. These systems combine domain specific machine learning and physics based models, sources said, with GenAI layered on for orchestration and productivity. As one source explained, “We are focused on doing more with less high output, lower risk, and better margins.”

Measured impacts from AI adoption are now clearly quantifiable across the energy value chain. According to sources, AI screened drilling prospects are delivering higher success rates, more consistent completions, and improved capital efficiency. One source highlighted, “AI materially improves returns by reducing failures and tightening capital allocation.”

All participants are using GenAI today, with production optimization and operations seeing the earliest impact. Smaller firms typically rely on hyperscalers such as Microsoft Copilot or ChatGPT, while large multinationals increasingly build mission critical systems in house. Sources suggest AI is becoming a core differentiator in energy sector performance.

Diabetes CGM & Pumps – US

Grassroots® conducted interviews with US based medical professionals who treat diabetes patients using continuous glucose monitors (CGMs) and insulin pumps to assess recent adoption trends, brand preferences, and factors influencing device starts. CGMs continuously track glucose levels to provide real time data and alerts, while insulin pumps deliver continuous insulin dosing for patients requiring insulin therapy.

Recent data show CGM adoption continuing to outpace insulin pump uptake, particularly among Type 2 patients. Over the past 90 days, an average 34% of new adult Type 1 patients started a CGM and 27% began using an insulin pump, while among new adult Type 2 patients, 24% started a CGM and 8% started a pump. A source said, “Around 90% to 95% of our diabetes patients are Type 2. Some I’ll start on CGMs, if they are interested, but it also depends on the physician’s orders. In the past few months, I’ve put four or five Type-2 patients on CGMs and none on pumps.” Looking ahead, 92% of sources expect new CGM starts to increase over the next 6–12 months, while expectations for pump growth remain more modest, with 56% anticipating an increase and 36% expecting starts to remain flat. One clinician said CGM adoption is rising because “no one wants to poke their finger anymore,” while another noted, “pumps may grow more slowly as better glucose visibility allows some patients to manage insulin needs without intensification”.

Device selection remains concentrated among a small set of manufacturers. Abbott and Dexcom lead CGM initiations, while Insulet, Tandem, and Medtronic are the most frequently started insulin pump brands. Across devices, 92% of sources cited insurance as the single most important factor influencing adoption. While GLP 1 use among Type 2 patients has reduced insulin dosing for 96% of sources who commented, [illegible] likelihood to initiate or maintain CGM or pump use.

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About Grassroots Research®

The Grassroots Research® division combines a variety of resources and methodologies, including in-house employees; a global network of independent, experienced journalists and consumer researchers; more than 50,000 industry contacts; and online panel surveys. We use this network to apply innovative market research and investigative journalism techniques to identify stock and sector trends before our competitors do.

Advantages:

- Continuous exchange of information between Grassroots® analysts and our investment professionals
- Expertise of independent journalists and consumer surveys to reach sources on the ground
- Technological tools to target consumer and business panels online
- Timely business insights via quick turnaround times
- 30+ years of experience conducting customized investigative market research around the world

Resources:

- Access to thousands of consumers in more than 60 countries via targeted online consumer and business panels
- On-the-ground investigators who conduct quantitative market research among consumers
- 55+ reporters who conduct interviews with industry experts
- In-house team based in the US
- 50,000+ industry contacts worldwide from a wide range of industries, including consumer, technology, healthcare, materials, industrials, energy and financials companies

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