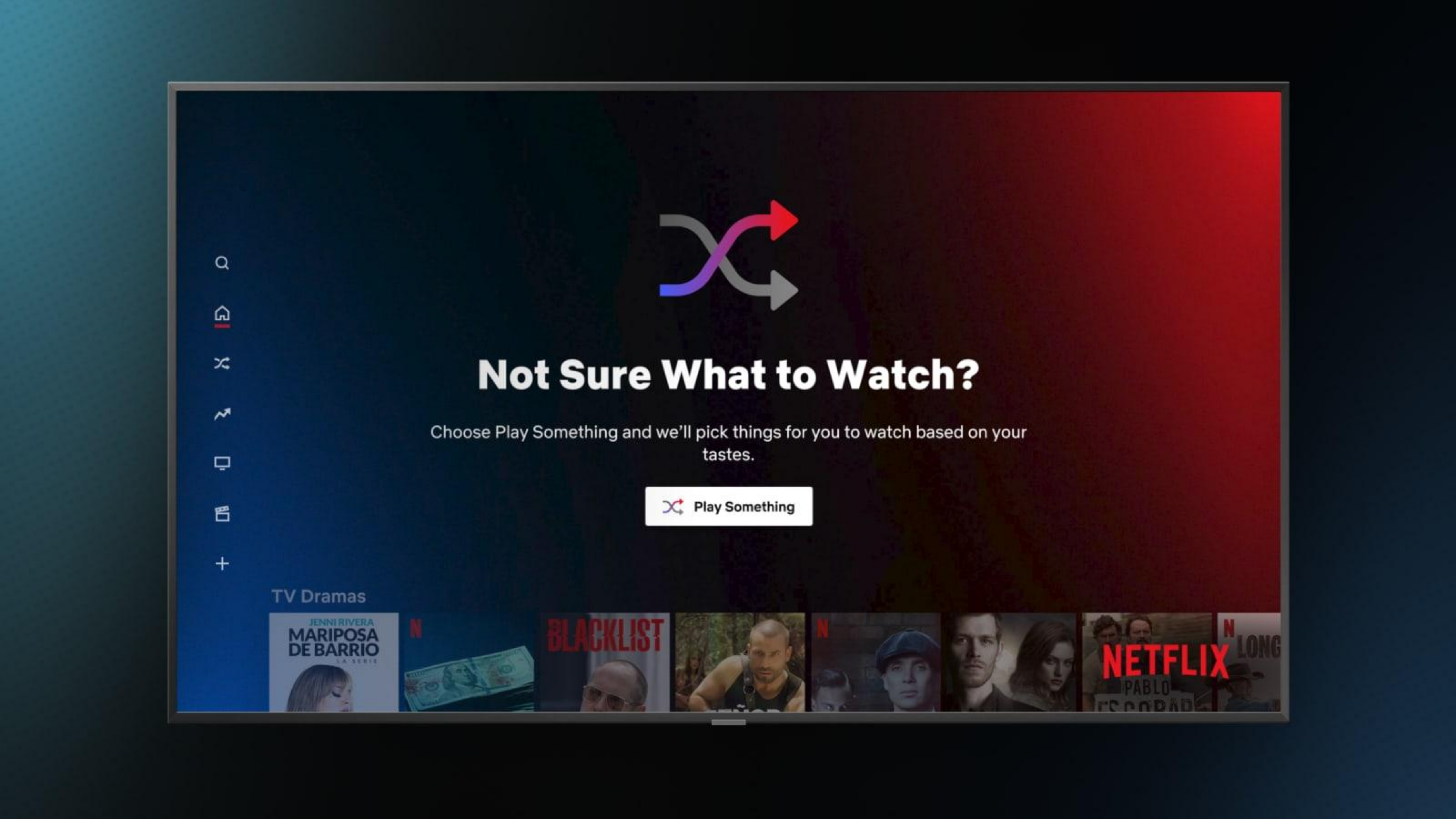
INNOSIGHT
BY HURON

When AI Becomes the Consumer’s First Choice

How AI Is Rewriting Discovery, Loyalty, and Growth in Consumer Goods

CONSUMER GOODS FORUM GLOBAL SUMMIT • i-Talk • JUNE 2026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A World of Abundant Choice on the Infinite Shelf

82,000+ new consumer goods launched globally since 2022

But 1 in 4 disappear within months

In 2024, only 35% of global launches were truly new

The rest were re-brands, line extensions, or reformulations, making it harder for consumers to spot real innovation

Chinese Gen Z consumers try 10–15 new FMCG brands per month

Social media discovery habits fuel experimentation, not long-term loyalty

In the U.S., 720 new CPG products launch every day

That’s a new product every two minutes, crowding every aisle and screen

Most launches don’t stick; only 31% show sustained growth

Even good ideas get lost in the noise

Sources: Euromonitor, FMCG Gurus, Bain, Kantar, China Shopper Report, Nielsen IQ

The Jam Problem: **More Choices Make Us More Depressed**

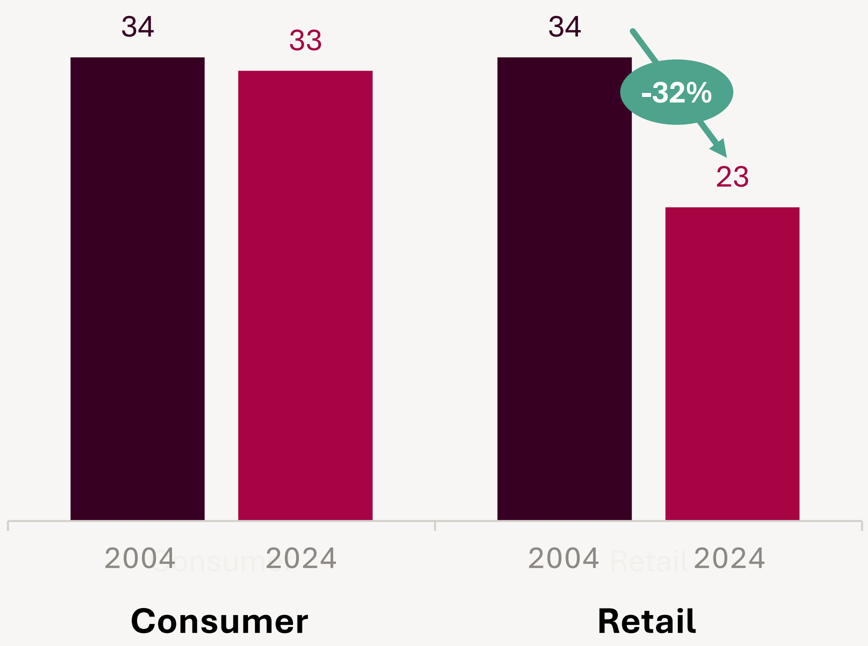
More options create:

- Cognitive fatigue
- Decision paralysis
- Anxiety
- Buyer's remorse

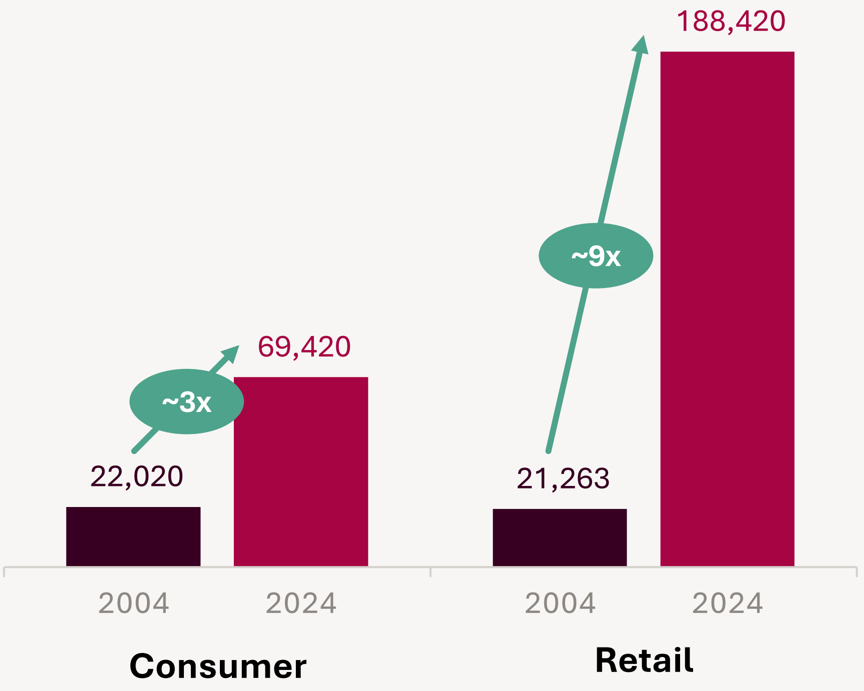

Innosight: Our purpose is to empower
forward-thinking leaders to
navigate disruptive change
and own the future

The First Disruption: **Retail Concentrates while Brands Fragment**

of Companies in S&P 500
Consumer Products vs. Retail - 2004 vs 2024



Avg. Market Cap per Company
Consumer Products vs Retail - 2004 vs 2024

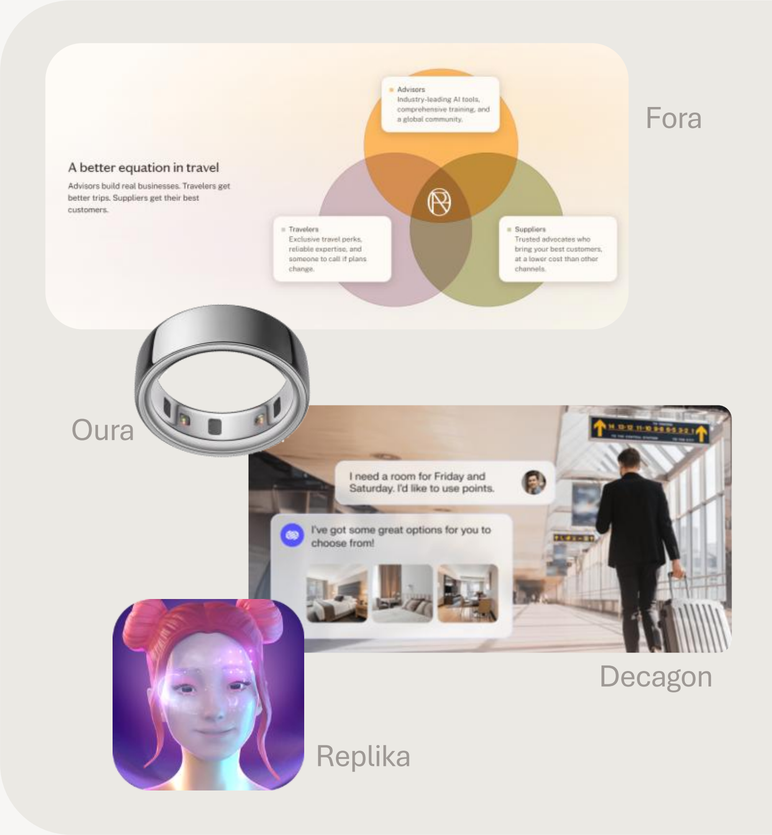


Sources: Refinitiv; Innosight analysis

The Next Disruption: **AI Creating New Consumer Pathways** as Ecosystem Moves from Search to Delegation

AI Touchpoints and Select VC-backed Consumer Startups

Interface	Daydream	FORA	
Intelligence	Known	ŌURA	
Execution	TOWN	DECAGON	duckbill
Identity	character.ai	Replika	DRESSX



Sources: Forerunner Ventures; Lerer Hippeau Ventures; Innosight analysis

As AI Remakes the Customer Journey, **Brands Need to Own the Identity** Layer

	ECOSYSTEM TOUCHPOINTS	WHAT'S CHANGING
Interface	**Ownership of UX / search and discovery**	Discovery is migrating from **search to AI interfaces**
Intelligence	**Turning user intent into insight, meaning, and personalization**	Structured filters – categories, checkboxes, keywords – are giving way to **AI's ability to interpret a users' intent**
Execution	**Delivery of product, service, transactions**	Appears to be defensible, but may **not be as valuable as controlling the top of the funnel**
Identity	**Social/ emotional authority, reassurance, community**	**Emotional reassurance and personalization** will matter as much or more than scale

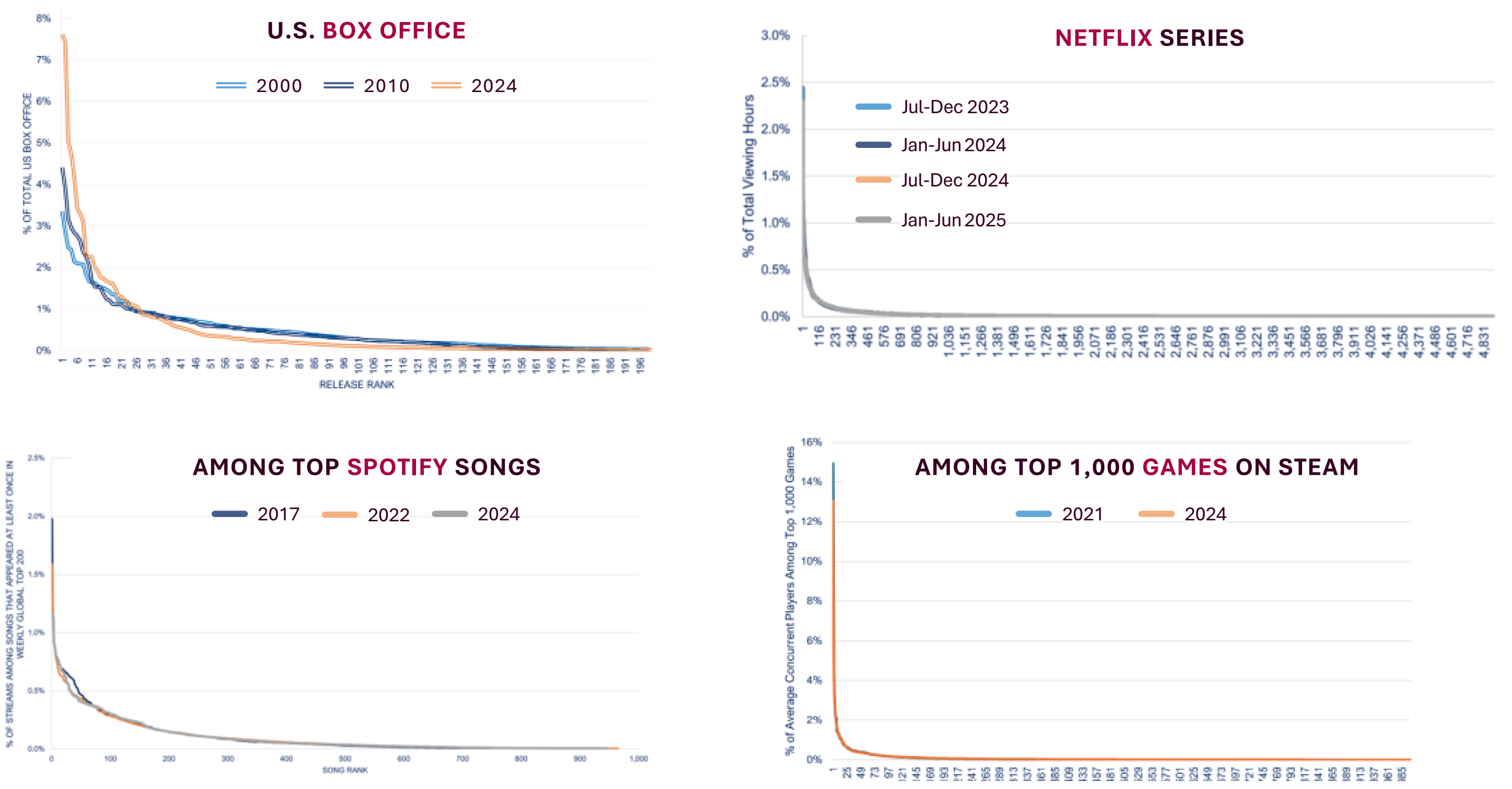
Focal points of AI disruption

Brand & Retail strengths to leverage

Sources: Innosight analysis

What happens when content is infinite? **The biggest hits get bigger and the long tail gets longer**

Popularity Distributions Becoming More Extreme in Corporate Media



Sources: Box Office Mojo, Netflix, Spotify, Steamcharts, The Mediator analysis

CPG: Already Evidence that **Winners Stay Winners**

Euromonitor Top Beverage Segments: Size, Growth, and Top Brands (2023)

	Carbonates	Bottled Water	Juice	Energy Drinks	RTD Tea	Sports Drinks	RTD Coffee
Category RSP $B (2023)	$228	$180	$103	$63	$54	$26	$22
CAGR (2018-2022)	5.4	5.6	2.4	8.9	1.5	6.9	1.3
Top 10 Brands	1. Coca-Cola 2. Pepsi 3. Coca-Cola Zero Sugar 4. Sprite 5. Fanta 6. Diet Coke 7. Mountain Dew 8. Dr Pepper 9. 7-Up 10. Diet Pepsi	1. Nongfu Spring 2. C'est Bon 3. Aquafina 4. Ganten 5. Evian 6. Dasani 7. Pure Life 8. Tennensui 9. Glacéau Smartwater 10. I LOHAS	1. Minute Maid 2. Tropicana 3. Del Valle 4. Simply 5. Ocean Spray 6. Capri-Sun 7. Naked 8. Master Kong 9. Innocent 10. V8	1. Red Bull 2. Monster 3. Celsius 4. Eastroc Super Drink 5. Rockstar 6. Sting 7. Adrenaline Rush 8. **Bang** 9. Red Bull Sugar Free 10. Lucozade	1. Master Kong 2. Lipton 3. Jiaduobao 4. Oi Ocha 5. Wong Lo Kat 6. Arizona 7. Uni Milk Tea 8. Pure Leaf 9. Uni-President 10. Fuze Tea	1. Gatorade 2. Powerade 3. Bodyarmor 4. Aquarius 5. Pocari Sweat 6. **G Zero** 7. **Prime** 8. Jianlibao 9. Green Dakara 10. Lucozade	1. Starbucks 2. Georgia 3. Boss 4. Nescafé 5. Monster 6. Wonda 7. Kirin Fire 8. DyDo 9. **Costa Coffee** 10. Tully's

New to Top 10

Sources: Euromonitor; Innosight analysis

3 Big Questions

1

Amid disruption, value tends to flow to whoever controls the consumer relationship. **What are we doing to forge direct relationships?**

2

AI is good for the brands that become the default recommendation—and bad for those that don't. **Do we know what makes our brand indispensable to consumers if discovery is delegated?**

3

Winners know where they stand out in the AI value chain – interface, intelligence, execution, identity. **Do we know where we are playing?**

Thank you!

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