



When AI Becomes the Consumer's First Choice

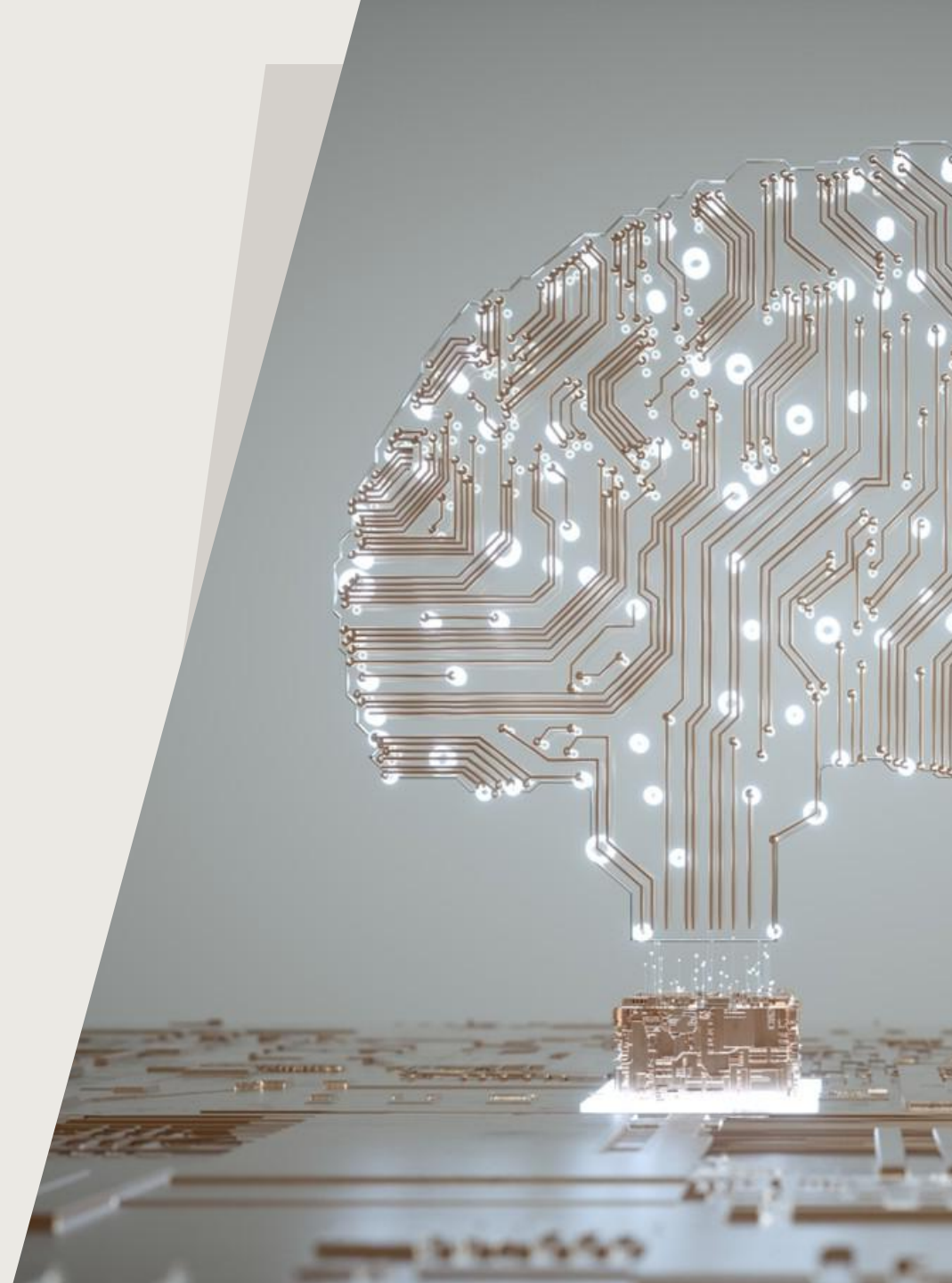
How AI Is Rewriting Discovery, Loyalty, and Growth in Consumer Goods

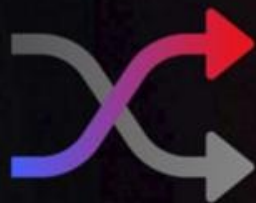
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Agenda

- 1** Cracking the Paradox of Choice
- 2** What's Scarce in the AI Economy?
- 3** The Threat: Winner-Takes-Most
- 4** What it Means for Brands and Retail





Not Sure What to Watch?

Choose Play Something and we'll pick things for you to watch based on your tastes.



Play Something

TV Dramas



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



The Jam Problem: More Choices Make Us More Depressed



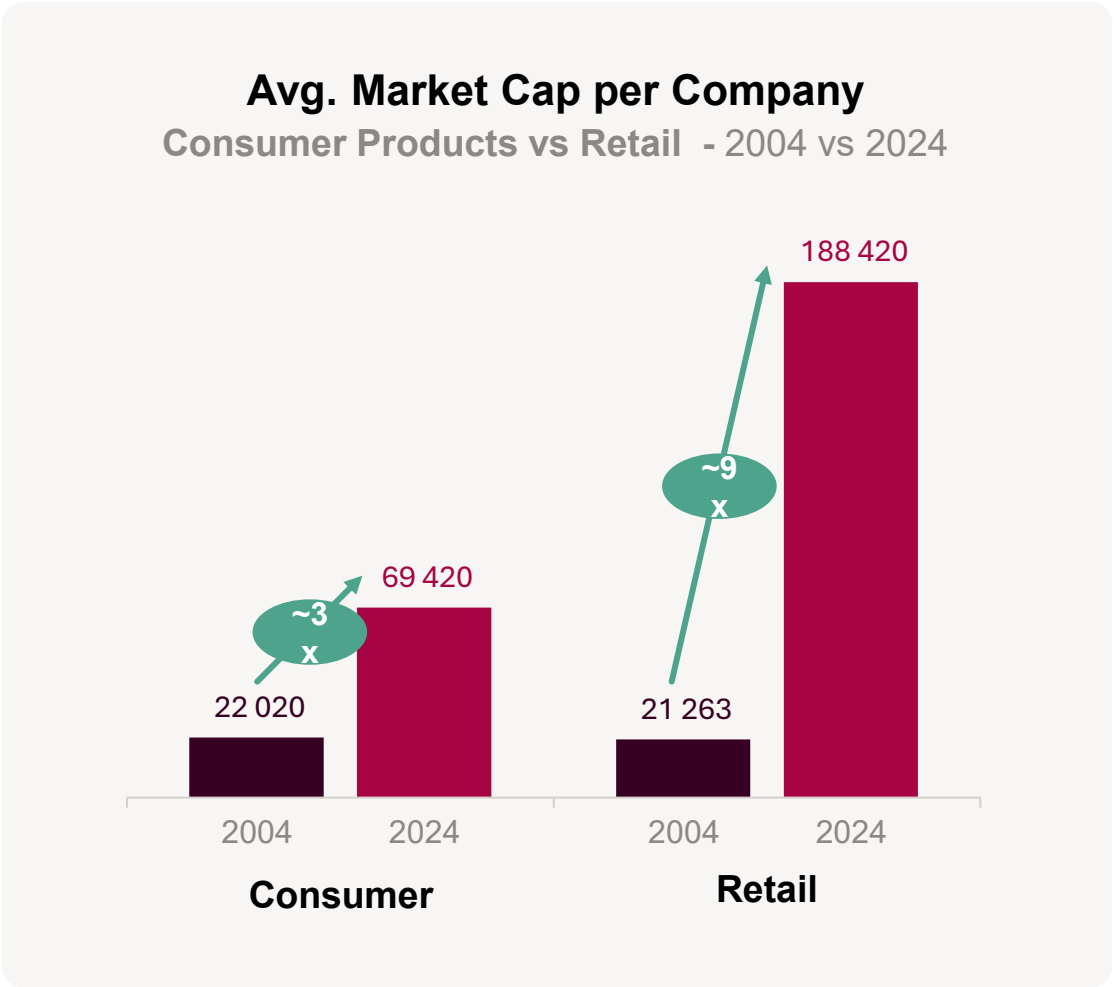
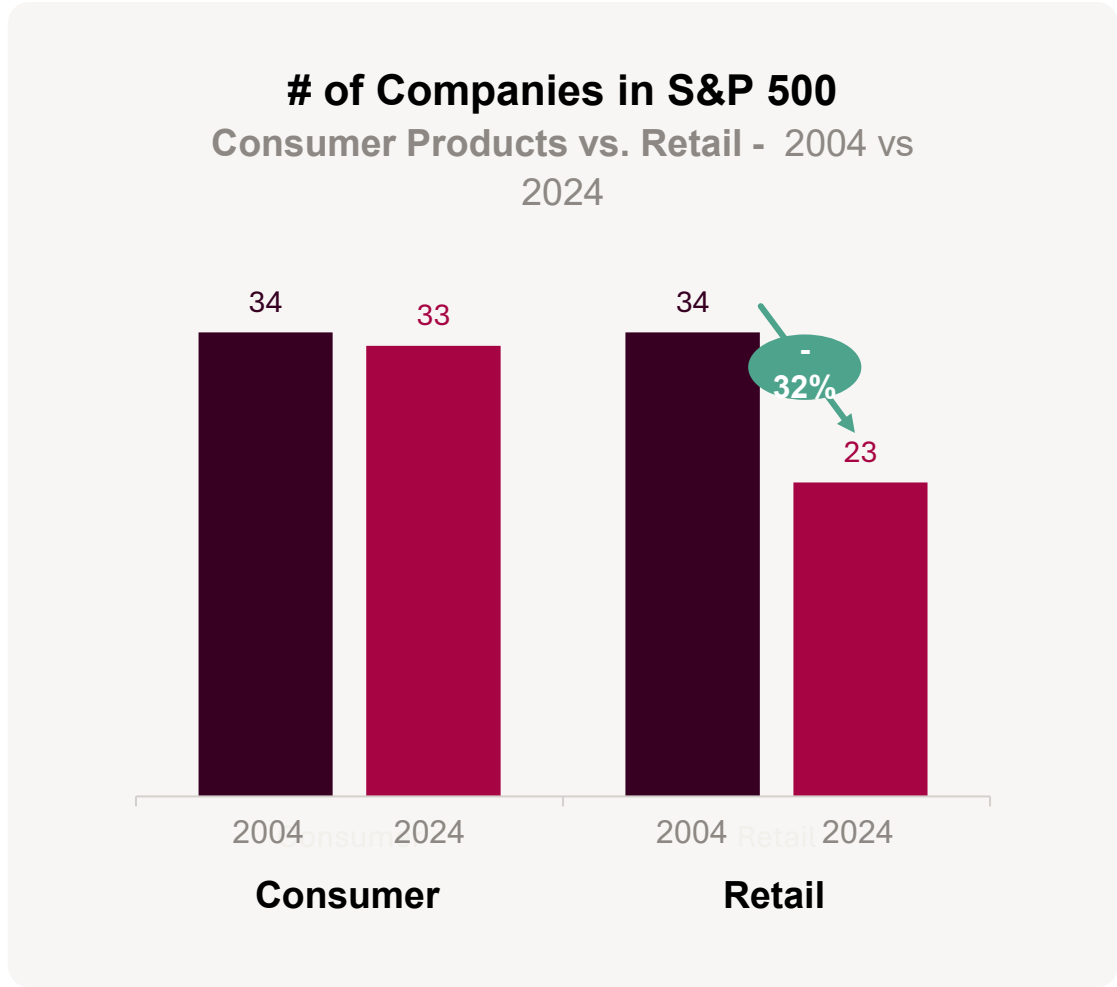
More options create:

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

A man in a dark suit, white shirt, and patterned tie is walking towards the camera on a paved path. He is smiling and looking slightly to his left. He is carrying a dark briefcase in his right hand. The background shows a brick building on the left, trees, and a paved area with some benches and lampposts in the distance. The lighting suggests it's daytime.

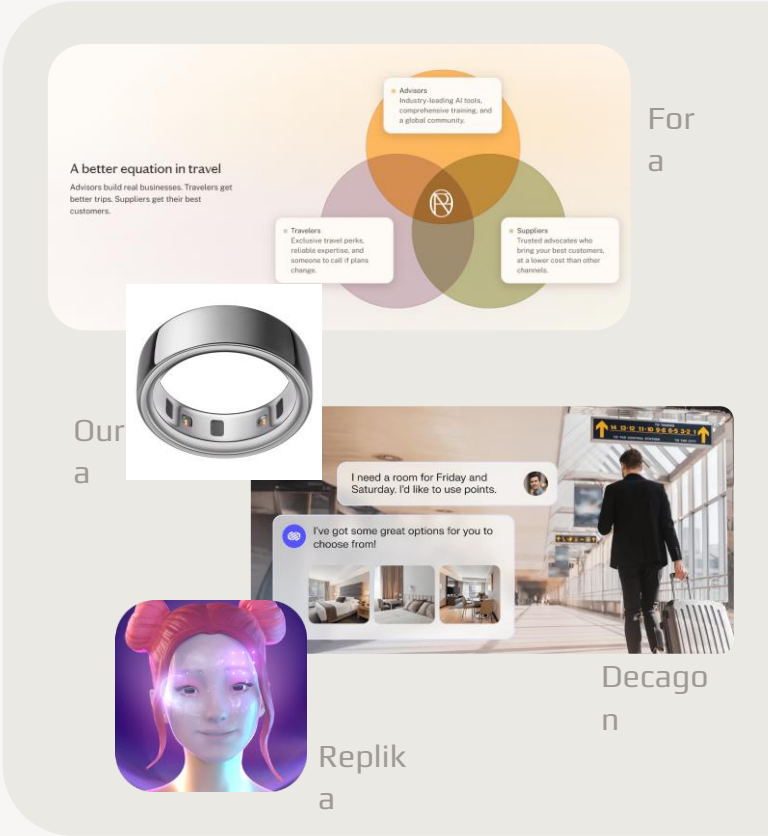
Innosight: Our purpose is to empower
forward-thinking leaders to
navigate **disruptive change**
and **own the future**

The First Disruption: Retail Concentrates while Brands Fragment



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

AI Touchpoints and Select VC-backed Consumer Startups

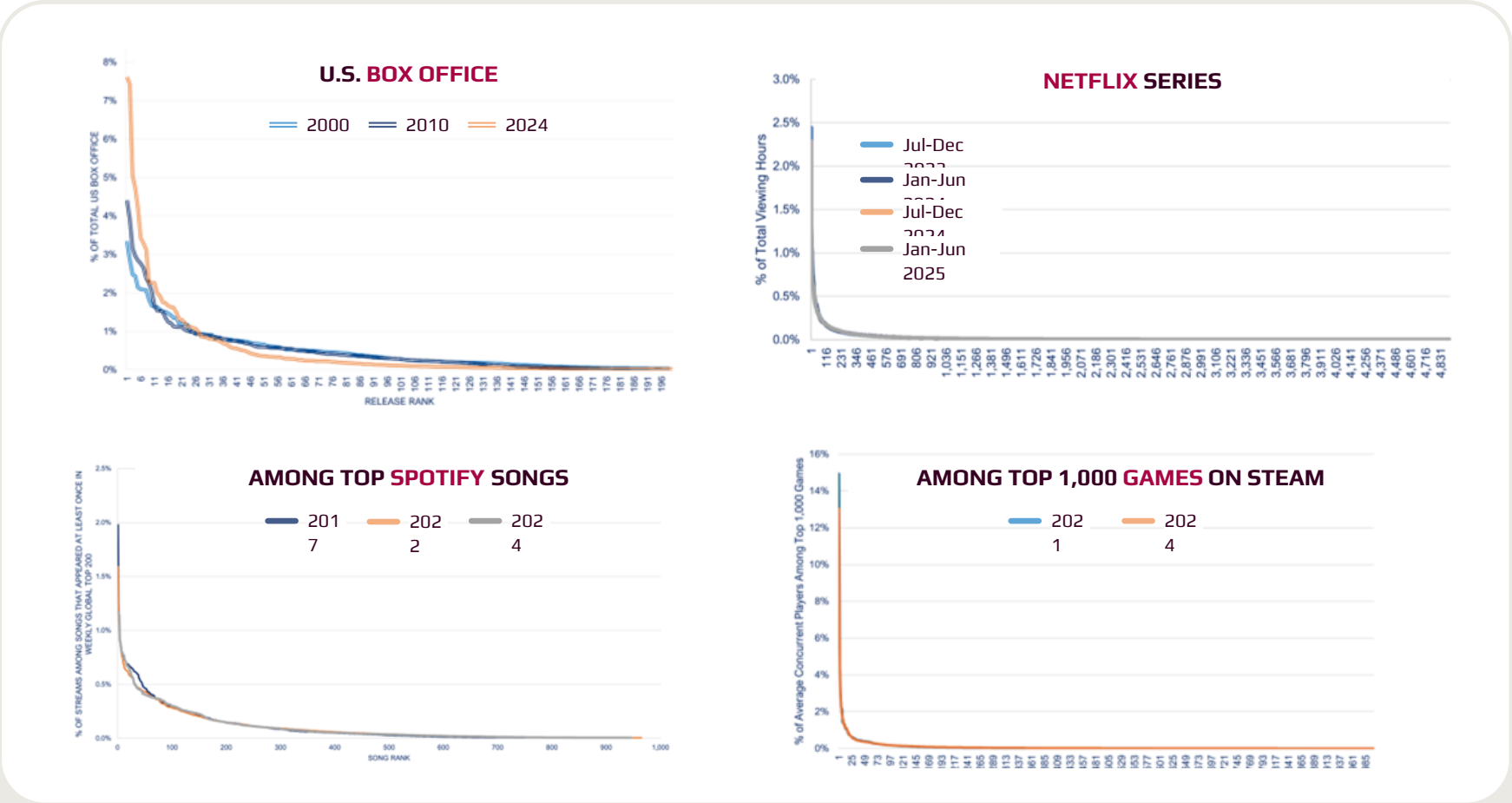


As AI Remakes the Customer Journey, Brands Need to Own the Identity Layer

	ECOSYSTEM TOUCHPOINTS	WHAT'S CHANGING	
Interface	Ownership of UX / search and discovery	Discovery is migrating from search to AI interfaces	Focal points of AI disruption ↓
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	Brand & Retail strengths to leverage ↑
Identity	Social/ emotional authority, reassurance, community	Emotional reassurance and personalization will matter as much or more than scale	

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



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

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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