



# The Adaptive Edge

Leveraging Technology & AI for  
Business Impact and Sustainability

Executive Summary



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# Introduction

# Introduction

**Austrian President Alexander Van der Bellen opened the 2026 Consumer Goods Forum (CGF) Global Summit in Vienna with a message about the power of cooperation in a complex world. Speaking to 900 delegates from across the consumer goods industry, he noted that the greatest progress often comes when organisations voluntarily work together around pre-competitive topics such as sustainability and food safety, while each company retains full independence over its commercial decisions.**

His message set the tone for a reimagined Global Summit held under the theme “The Adaptive Edge: Leveraging Technology and AI for Business Impact and Sustainability.” Reflecting the reality that today’s challenges do not arrive one at a time, the event introduced a new format built around four parallel tracks — The Evolving Consumer, Tech & AI Applied, People & Planet and Influencers & Makers — exploring the interconnected forces transforming the industry.

CGF Co-Chairs Ken Murphy, Group CEO of Tesco plc, and Max Koeune, President and Chief Executive Officer of McCain Foods, reinforced both the urgency and opportunity of this moment in their opening address. “The world around us, the changing climate, its impact on food systems, the expectations of the next generation of consumers, they keep reminding us that focusing on long-term business resilience is critical to the success of our companies,” Koeune said.

Murphy presented the Global Summit as the ideal place to address these connected challenges. “The CGF will keep being the place where we learn together, experiment together, and turn AI from a private advantage into a shared learning — because brands will be more important than ever in an AI world,” he said.

Across two and a half days in Vienna, Austria, the spirit of mutual inspiration shaped discussions on every stage. Speakers explored how technology can become shared learning, how sustainability and health can support long-term business success, and ways to unlock solutions beyond the reach of any single organisation. Together, the conversations reflected the central message of the Summit: in an era of constant change, the industry benefits from the ability to balance AI-enabled solutions with human ingenuity for the greatest impact.

CGF Managing Director Wai-Chan Chan reinforced this sentiment in his welcome message. “In today’s unprecedented world, where consumers are evolving at a rapid pace, our industry needs a safe forum like The CGF, where people can learn from and be inspired by each other,” he said.

**900 attendees**  
**120 speakers**  
**70 sessions**  
**40 countries**



**“The companies represented at the Consumer Goods Forum wield power — they can make a difference. Especially when they decide that a shared, good future for mankind is better than competing chaos.”**

Alexander Van der Bellen  
Federal President of the Republic of Austria







**Max Koeune**  
President & CEO  
McCain Foods

**Ken Murphy**  
Group CEO  
Tesco plc

## The four content tracks

### AI & tech applied

AI has moved from experimentation to execution — redefining how businesses think, decide, and deliver. The competitive edge now lies in how effectively leaders can scale it, responsibly, securely, and at speed. From proven use cases to the foundations that enable enterprise-wide adoption, leaders must turn potential into performance. This track explored what it takes to embed AI across the value chain, balance innovation with governance, and build the talent and culture needed to lead in an intelligent, data-driven world.

### The evolving consumer

The consumer journey is being rewritten — fluid, digital, and deeply influenced by social discovery, creators and AIs. Algorithms now shape awareness as much as advertising does, and loyalty is earned (or lost) in moments, not months. For CEOs, this transformation demands more than adaptation; it requires reinvention. Brands and retailers must rethink how they attract, convert, and retain consumers in a landscape where digital convenience, price transparency, and instant gratification have reset expectations. Those who decode these new behaviours will define the next era of growth.

### People & planet

Long-term business performance depends on the health of people and the planet. This track focuses on how leading companies are embedding sustainability and social impact into core strategy — driving efficiency, innovation, and resilience. From workforce transformation to climate action and resource use, the goal is clear: align business performance with positive outcomes for society and the environment. The leaders who succeed will prove that doing good and doing well are no longer separate agendas, but one path to sustainable growth.

### Influencers & Makers

Culture moves faster than business — and those who shape it often define what comes next. In this track, voices from media, entertainment, and creative industries join business leaders to explore how storytelling, influence, and innovation are reshaping consumer engagement and brand relevance. From creators and explorers to entrepreneurs and visionaries, these are the makers driving ideas that move markets. Their insights and energy inspired Summit participants to think differently — about leadership, creativity, and the power of culture to shape the future of business.



# Leading responsibly in an unpredictable world

Malina Ngai  
Group CEO  
AS Watson Group

Malina Ngai  
President - Consumer Products Division  
L'Oréal





## Leading responsibly in an unpredictable world

Those skimming the Global Summit programme ahead of the event might have been surprised to see champion skier Lindsey Vonn listed as a speaker at an event focused on the consumer goods industry. However, her well-attended keynote revealed the logic of her inclusion. Vonn’s career, especially her historic comeback and winning streak at the age of 41, has been marked by perseverance, adaptability and a willingness to take risks. These characteristics are likely to be relatable to the industry leaders that make up the Summit delegation.

Other speakers, including nearly 40 CEOs, offered complementary advice on leadership in a changing world. In the session titled “A CEO’s AI Playbook,” AS Watson Group CEO Malina Ngai and L’Oréal Group CEO Fabrice Fourteau focused on the importance of following through on AI investment with capability building at all levels of the organisation. “AI will not transform a company because you bought it. AI will transform a company because you let it, through personal leadership and organisational agility,” Ngai said.

The CGF Board Co-Chairs, Tesco plc Group CEO Ken Murphy and McCain Foods President & CEO Max Koeune, returned to the stage on the second day of the Summit to discuss how leadership will change in the future. In conversation with participants in The CGF’s Future Leaders Programme, they concluded that some of the most important qualities of a CEO include balancing strategic vision with operational performance; listening to all voices and recognising the best ideas in a room; and using humour as a tool to adapt to different situations.



**“The winning mindset is never giving up. Successful people are unwilling to let adversity stop them — they’ll always find a way through, and you need that not just in sport, but in life.”**

Lindsey Vonn  
American Alpine Ski Racer  
Red Bull Athlete



The final day of the Summit was dedicated to conversations on retail leadership, steered by executives representing different regions and subsectors within the industry, from the UK to China and from convenience stores to airport kiosks. Each described their own experience that consumers everywhere seek efficiency and convenience, but they also value human connections and personalised attention. Success in the sector therefore depends on striking a balance between technology — such as e-commerce options, smart carts and self service — and the human touch.

The CEO is an important part of that human equation, said Rami Baitiéh, CEO of Morrisons. “If you stay in your office and think everyone will tell you everything you need to know, it’s an illusion. You must go to every shop floor yourself to increase your overall awareness of what is happening on the ground,” he said.

Subject matter experts also offered leadership lessons to the executives in attendance, extrapolating current trends and political shifts to a possible future. Political scientist Ian Bremmer, President and Founder of Eurasia Group and GZERO Media, presented his own “CEO Playbook” based on current political conflicts. He noted that AI also has a role to play on this front, with AI executives joining G7 leaders at the 52nd G7 summit in France.

In his conclusion, he pointed to the word “legacy” as a defining concept for current CEOs, suggesting that long-term planning and engagement with industry forums can help companies navigate leadership transitions.

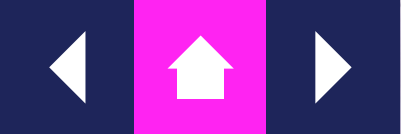


Rami Baitiéh  
CEO  
Morrisons

Max Koeune  
President & CEO  
McCain Foods

Ken Murphy  
Group CEO  
Tesco plc

Joëlle de Montgolfier  
Practice Executive VP  
Bain & Company





# Key takeaways

Ian Bremmer  
President and Founder  
Eurasia Group and GZERO Media



## 01

AI investment produces results only with CEO support and direction.

Capability building, organisational agility and executive follow-through matter as much as technology spending.

## 02

Retailers are investing in automation while preserving opportunities for human interaction.

Across regions and formats, executives described combining tools such as self-checkout, smart carts and e-commerce with personalised in-store service.

## 03

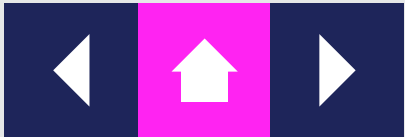
Leadership increasingly requires preparing for geopolitical uncertainty.

Speakers pointed to political developments, shifting trade relationships and AI governance as factors to incorporate into long-term business planning.

## 04

The next generation of CEOs will need to balance strategy with operational execution.

Current chief executives highlighted listening to employees, recognising good ideas regardless of where they originate and maintaining perspective through change.





# Making AI part of everyday business



## Making AI part of everyday business

Though artificial intelligence has been a frequent topic at the Global Summit for several years, the tone this year was characterised by a certain familiarity rather than the burst of enthusiasm that surrounded the launch of ChatGPT in 2022. Generative AI has settled into the workflows of most large companies, and leaders are learning to leverage it as a tool to unlock human efficiency and creativity.

The new horizon is agentic AI: systems that can act autonomously to set goals, plan step-by-step workflows and execute tasks with minimal supervision. While companies incorporate these systems into their own workflows, consumers are increasingly using them to inform their purchasing decisions, leading to situations in which multiple layers of agents mediate the relationship between brand and consumer.

Several sessions at the Summit shared case studies on applications of agentic AI in the consumer goods industry, spurred by partnerships between brands, technology providers and professional services companies. The

session “Agentic AI in Action: How CG Leaders Deliver Measurable Results” demonstrated how Microsoft helped Albert Heijn create a consumer-facing AI shopping assistant named Steijn; Danone to improve decision-making in complex areas such as material science for circular packaging; and Heineken to develop its internal generative AI hub, Hoppy. Heineken also partnered with IBM Consulting to implement AI at an enterprise scale, as did Nestlé. Both manufacturers shared their experience with IBM in “Driving Results with Trusted AI: Heineken and Nestlé.”

Meanwhile, Kraft Heinz worked with EY to add an AI-enabled orchestration layer to its innovation system, as shared in the session “Reimagining Innovation: The Kraft Heinz and EY Collaboration,” and Unilever worked with Capgemini to establish eight AI-powered marketing hubs, explained in “Reimagine Demand Generation: How AI hubs unlock growth, creativity & speed.” In addition to driving growth and innovation, each partnership aimed to free employees to focus on human-centric areas such as creativity and strategy rather than repetitive, operational tasks.

Speakers noted that agentic AI has repercussions for other forms of technology used by the consumer goods industry, such as retail media and social media marketing. Some questions in this field remain unanswered, such as: If agents are making purchasing decisions, how can retail media and other forms of marketing reach them and remain relevant?



**“We’re starting to see this capability gap emerge — what is possible today versus the value organisations are getting — and the companies that wait for the perfect moment will find that gap getting wider and harder to close.”**

Nicolai Skabo  
Head of Sales, EMEA  
OpenAI





Josh Bottomley  
CEO  
Dunnhumby

Josh Bottomley, CEO of Dunnhumby, said in a session titled “Redefining Brand and Retailer Collaboration for the Agentic Commerce Era” that companies can expect a future in which internal agents anticipate the actions of consumers’ agents. However, major commercial choices — such as brand positioning, investment priorities and category strategy — will continue to require human judgment.

For now, GEO (generative engine optimisation) is more immediately relevant than the question of creating marketing campaigns for agents. As Clarisse Magnin and Jessica Moulton, senior partners at McKinsey & Company, noted in their presentation on consumer trends, nearly all Gen Z consumers say they use generative AI tools, and almost 30% of Gen Z and millennials use them for shopping. Several speakers, including representatives of Deloitte in the session “The Invisible Shelf: Surviving the Algorithm and the Death of the Middle,” discussed the importance of creating content that leads brands to appear in generative AI results rather than in traditional search.

Predictive AI, which has longer roots in the consumer goods industry than generative or agentic AI, also remains relevant. PricingOne and Hanshow presented different applications for prediction tools in a session titled “Smart Cart Revolution in Physical Retail.” Danone worked with PricingOne to

develop a platform that uses a predictive AI layer to help optimise its own commercial decisions on promotions and assortment, as presented in “Predictive AI to Better Serve the Consumer.” Meanwhile, Hanshow works with retailers to incorporate data into smart cart systems that can, among other applications, measure and predict campaign performance in real time.

Delegates witnessed other AI-powered retail tools in action at the Store Tour, which took delegates beyond the conference halls and into Vienna’s vibrant food and retail landscape. Across the city, participants explored everything from bustling neighbourhood markets to large-format stores and emerging digital experiences, with visits including Billa Corso, Billa Plus, Hofer, Interspar, Eurospar, Spar Gourmet, Kastner and VELOQ. Set against the backdrop of one of Europe’s great culinary capitals, the tours offered a closer look at how Austrian retailers are blending technology and tradition to meet changing consumer expectations.



# Key takeaways

## 01

Companies are incorporating agentic AI into both internal workflows and consumer-facing campaigns.

Speakers highlighted systems that can plan and execute multi-step tasks autonomously, both within organisations and increasingly on behalf of consumers.

## 02

Generative AI is changing how consumers discover brands.

Speakers pointed to growing use of AI tools for shopping, particularly among younger consumers, and highlighted generative engine optimisation (GEO) as an increasingly important complement to traditional search optimisation.

## 03

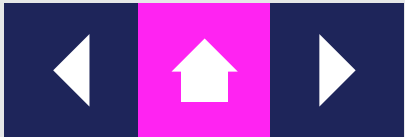
Predictive AI continues to deliver commercial value alongside generative AI.

Examples included AI systems that help individual companies optimise their commercial performance recommend product assortments and analyse real-time retail performance through connected shopping technologies.

## 04

Human judgement remains central to major business decisions.

While AI agents are expected to play a larger role in operations and purchasing, decisions such as brand strategy, investment priorities and category management continue to require executive oversight.





# Winning today's consumer



## Winning today's consumer

**Success requires more than efficient logistics; it demands a commitment to traceability, interoperability, and real-time insight that spans the journey from the smallholder farm to the retail shelf. Discussions at the Conference demonstrated how using certification as a common language facilitates more agile trade corridors, ensuring that even the most intricate networks remain grounded in accountability.**

One pertinent new development is GLP-1 (glucagon-like peptide-1), a class of weight loss drugs that has already been prescribed to about 15% of U.S. adults. In a breakout session titled "Fact, Fiction, or Future? How GLP-1 is Rewriting the Global Food System," KPMG leaders described GLP-1 medications as a possible inflection point for the food industry because of their ability to suppress desire for food, especially salty snacks, sweets, soda and starches. Brands can prepare for their rise in the U.S. and other regions by adapting product lines to the needs of GLP-1 users and other consumers interested in weight control, such as reducing portion size and emphasising protein.

Representatives from PwC presented other consumer trends from their Voice of the Consumer survey, which interviewed more than 20,000 consumers in 27 countries, in the session "PwC's Voice of the Consumer Survey: The Rise of Everyday Health."

They reported that longevity, stress reduction and weight management are among consumers' leading health goals, while wearables and health apps are rapidly changing behaviour.

The retailer Ahold Delhaize also conducted research on how health informs consumer behaviour. Representatives from the company shared that while approximately 90 percent of consumers say they want to live healthier lives, only 14 percent believe they consistently eat healthily. Ahold Delhaize is working to increase sales of healthier products while using digital tools and personalised recommendations to help consumers make better everyday decisions.

These findings echo The CGF's recent report State of Food Habits: A Baseline of How Consumers Eat Today, developed with Bain & Company. The report examines the realities shaping everyday food choices around the world and highlights the need to understand current behaviours as the industry works to make healthier and more sustainable choices easier for consumers. Some notable insights from the report include the finding that respondents currently cook 49% of at-home meals from scratch, but say they'd like that to rise to 59%. Furthermore, 40% of respondents say they mostly eat at home alone, meaning that opportunities remain to provide from-scratch solutions for single-serving cooking.



**“Instant gratification has shifted from being a differentiator to actually being the global baseline. Consumers use technology to buy back time and to spend more of it in the real world.”**

Susan Anderson  
Global Head of Delivery  
Uber



During the Global Summit, executives showed off their own penchants for scratch cooking in the Sustainable Kitchen, a new addition to the Global Summit experience. Introduced by Summit host Isabelle Kumar as a place where delegates could find “CEOs and CSOs rustling up some culinary delights,” the space offered an interactive way for delegates to connect around the food. The space was a manifestation of the broader Sustainable Kitchen project spearheaded by the Food Waste and Healthier Lives Coalitions of Action. The Sustainable Kitchen website brings together a diverse collection of recipes from more than 20 global member companies, each designed with a dual focus on educating consumers to minimise waste and maximise nutritional value.

Health is far from the only concern of the modern consumer, however. They also increasingly expect a near-instantaneous degree of ease and

convenience. In the session “Built for the Moment: How Uber Is Redefining the Consumer Journey and Quick Commerce Across Delivery, Mobility, and Beyond,” Susan Anderson, Global Head of Delivery at Uber, described young consumers as belonging to “Generation Uber” — all of their desires can appear at their door through a few taps on an app. She explained that immediate delivery has moved beyond restaurants into everyday retail categories, with consumers using platforms for everything from forgotten household essentials to healthcare products.

These on-demand expectations are especially prevalent in China and some other Asian countries, where same-day delivery has been standard for years even parcel-carrying drones are no longer novel. Several speakers helped illustrate the robust logistics and AI-powered systems that underpin Chinese e-commerce companies’

on-demand capabilities, including representatives of NielsenIQ, Joybuy and Haleon in a session titled “The Commerce Revolution: Where East Meets West.”

The speakers explained that Western retailers tend to separate elements of the consumer experience, such as social media, e-commerce and delivery, into different channels, while the Chinese model is more integrated. There are opportunities in both regions for companies to learn from each other.

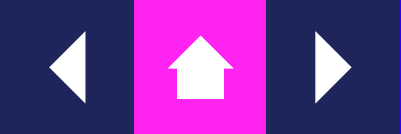


Sharon Bligh  
Director of Health and Sustainability  
The Consumer Goods Forum



Frans Muller  
President and CEO  
Ahold Delhaize

Ayla Ziz  
CCO and SVP Commercial Europe  
Danone





# Key takeaways



## 01

Health is becoming a more important driver of purchasing decisions.

Speakers pointed to the growth of GLP-1 medications, increasing interest in longevity and stress management, and the opportunity for companies to adapt products through features such as higher protein content and smaller portion sizes.

## 02

A gap remains between consumers' aspirations and behaviours.

Research presented by Ahold Delhaize found that while about 90% of consumers want to live healthier lives, only 14% believe they consistently eat healthily, highlighting opportunities for retailers to support everyday decision-making.

## 03

Convenience has become a baseline expectation rather than a competitive advantage.

Consumers increasingly expect rapid, on-demand access to products across categories ranging from groceries to healthcare.

## 04

Eastern and Western retail approaches offer contrasting perspectives.

Speakers contrasted China's integrated approach, where social media, e-commerce and delivery operate as a connected ecosystem, with the more fragmented Western model, noting that companies in each region may find useful insights from studying the other's approach independently.



# Building safe and sustainable systems



# Building safe and sustainable systems

Business, climate and human rights are often discussed separately, but speakers at the Global Summit understood them as interconnected challenges. Whether discussing circular packaging, farming practices or labour conditions, speakers described a growing expectation that companies help address problems that extend far beyond the shelf. The result was a set of conversations that placed people and the planet at the centre of business strategy.

While AI has as many applications for sustainability as it does for other business imperatives, its use in the field comes with an asterix. A recent CGF report, The AI footprint: What consumer goods companies need to know about AI’s environmental impacts, developed with Bain & Company, noted that AI currently accounts for approximately 1% of global electricity demand — with future impact depending on how efficiently models and infrastructure evolve.

However, the report also notes that AI can accelerate sustainability, and speakers at the Global Summit agreed. In a session titled “The Adaptive Sustainability Edge: How AI Is Redefining Value Creation in Consumer Goods ,” speakers from SAP, Danish Crown and Deloitte said that the next generation of product and packaging regulations — including the EU’s Packaging and Packaging Waste Regulation (PPWR) and Digital Product Passports (DPP) — requires SKU-level tracking to a degree that is difficult to manage without AI. AI tools can also help companies integrate data on material recovery to design new products and packaging that are better attuned to the circular economy.

AI’s potential to superpower traceability has broader implications in the food industry, as speakers from Infosys, Mondelez and Economist Enterprise explained in a session titled “Factory to Shelf to Smile: Building Trust at Scale Across Mondelez Brands: Cadbury, Oreo and Chips Ahoy.” Infosys and Mondelez partnered to create an AI-powered traceability platform to comply with the US FDA’s Food Safety Modernization Act.

In the process, they realised that the greater traceability could also help Mondelez reduce food waste and more quickly shift logistics to respond to geopolitical and environmental disruptions.

Traceability tools are also an important part of the arsenal against human rights abuses. Volker Türk, United Nations High Commissioner for Human Rights, contributed a recorded message for a session focused on addressing forced labour in the consumer goods industry, highlighting The CGF’s role in this effort. Speakers agreed that AI offers the potential to analyse large volumes of supply chain and social data, identify emerging risks earlier and prioritise intervention before abuses escalate. However, even the best-equipped due diligence teams can only be successful with visible commitment from senior leadership.

While AI and other digital tools can support sustainability efforts, some of the most effective solutions are more low-tech — such as regenerative agriculture, a set of practices informed by pre-industrial farming that aims to replenish soil through natural methods.

Speakers from McCain Foods and Tesco plc — including fourth-generation potato farmer James Durdy — shared some of the benefits of “regen ag,” including its potential to increase carbon uptake, prevent desertification of agricultural land, and produce better fruits and vegetables.



“Anytime you’ve got a supply chain with fragility because of potential human rights compromises, you’re at risk. ... Being incredibly proactive is something that really builds resilience for our business going forward.”

Leah Weckert  
CEO & MD  
Coles Group

John Ross  
President & CEO  
IGA Inc.





# Key takeaways

Scott Price  
Group Chief Executive  
DFI Retail Group



## 01

The environmental impact of AI depends on how it is implemented.

While speakers acknowledged AI's growing energy demands, they also presented examples where it helps companies meet sustainability goals.

## 03

Human rights due diligence is an important part of everyday business operations.

Procurement, merchandising and executive leadership all have roles in identifying labour risks.

## 02

Companies are using AI to meet growing traceability and reporting requirements.

AI supports SKU-level tracking and better visibility across complex supply chains, offering applications for food safety, human rights due diligence, packaging circularity and more.

## 04

Regenerative agriculture is gaining traction as a practical farming approach.

Practices that improve soil health can also support productivity, water retention and carbon storage.



# Conclusion

Max Koeune  
President & CEO  
McCain Foods

Ken Murphy  
Group CEO  
Tesco plc





# Conclusion

As much as the Global Summit highlights innovation and new developments, it also reflects qualities that consumers expect from manufacturers and retailers: reliability, stability and a dedication to core values. The priorities on display at the Summit, including sustainable growth, responsible leadership and a focus on consumer needs, remained constant from previous editions, despite the new faces, format changes and other additions to the programme. These tenets underpinned conversations both on the conference stages and at networking events such as the Gala Dinner, on the first evening of the Summit, sponsored by L’Oréal and the Official Reception, sponsored by SPAR and Heineken.

One new development was the increasingly steady beat of artificial intelligence as a common instrument behind all other topics. As Hepsiburada CEO Nilhan Onal Gökçetekin joked during her talk, “No AI, no seat at a conference.” In future years, AI may fade more into the background, coming into the conversation as often as everyday tools like servers and smartphones. That level of ubiquitous implementation will involve leadership buy-in and an emphasis on accelerating human ingenuity rather than replacing it.

If Vienna offered one clear takeaway, it was that the industry’s biggest conversations are becoming harder to separate. AI influences consumer behaviour. Consumer expectations shape product development. Traceability supports food safety, regulatory compliance and human rights. Companies are increasingly relying on the same data, technologies and partnerships to address challenges that once belonged to different parts of the business.

Those intersections reflect The Consumer Goods Forum itself: a platform for manufacturers, retailers and other industry stakeholders to address pre-competitive topics—such as sustainability, food safety and human rights—from a broad range of perspectives. We look forward to seeing what results from these conversations when we reconvene in San Francisco in 2027.

Next stop...  
San Francisco

Save the date  
8 to 11 June 2027



“In today’s unprecedented world, where consumers are evolving at a rapid pace, our industry needs a safe forum like the CGF, where people can learn from and be inspired by each other.”

Wai-Chan Chan  
Managing Director  
The Consumer Goods Forum



# Video and photo highlights



Video and photo highlights



Day 1



Day 2



Day 3



Store Tour



The Leadership Studio



Photo Gallery



# Acknowledgements



Our speakers

**Juan Aguiriano**  
Group Head of Marketing and Sustainability  
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**Susan Anderson**  
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**Rami Baitiéh**  
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Morrisons

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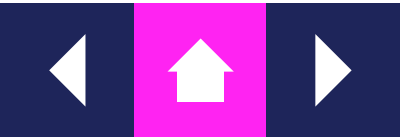
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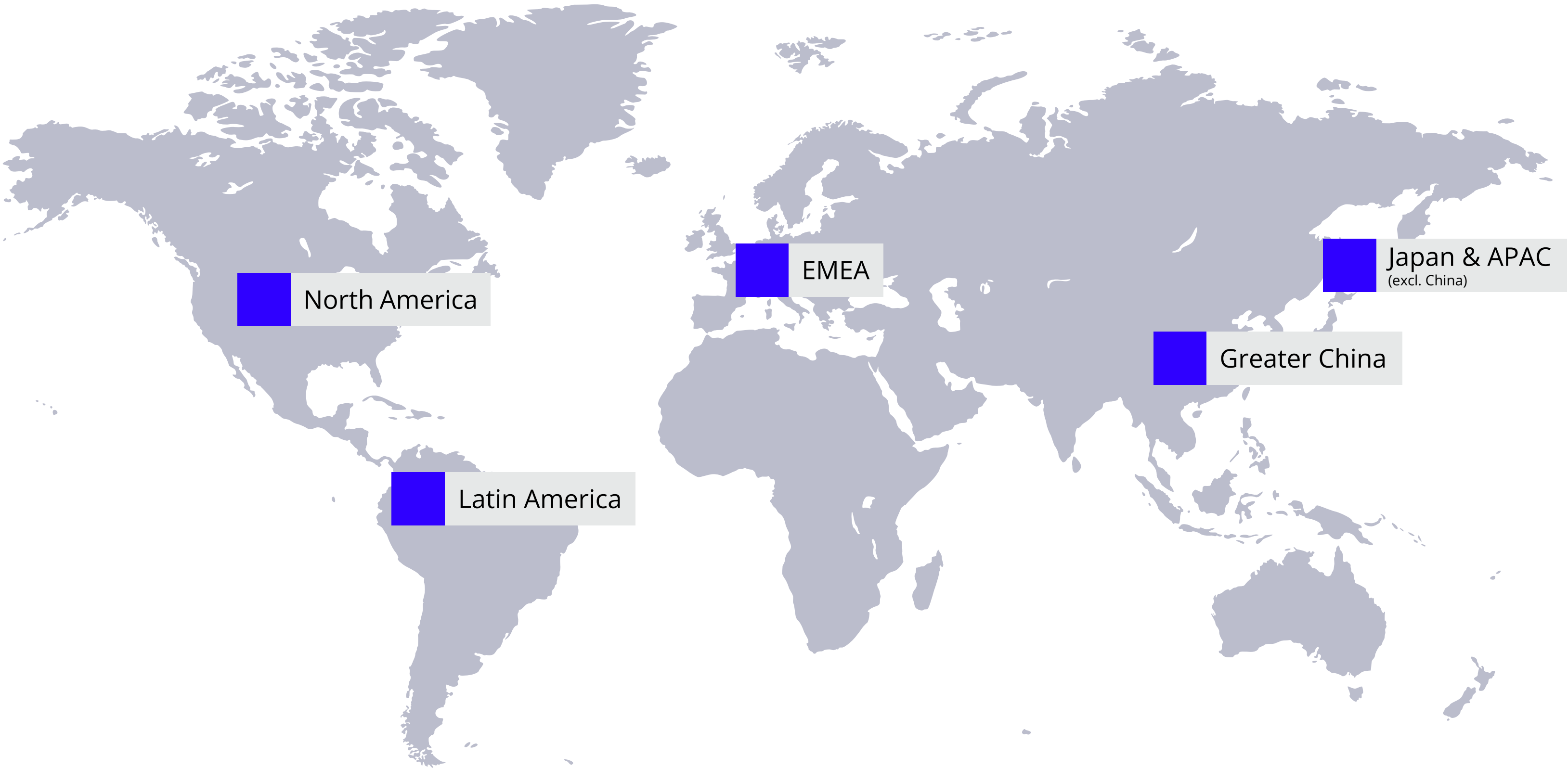




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For over 70 years, The Consumer Goods Forum (The CGF) has united the world’s leading retailers and manufacturers to solve industry-wide challenges.

Guided by the vision Better Lives Through Better Business, our work is defined by a singular mission: Bringing together consumer goods manufacturers and retailers in pursuit of business practices for efficiency and positive change across our industry benefiting shoppers, consumers and the world without impeding competition.







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