

Staying connected,
creating momentum

Highlights and insights from The Consumer Goods Forum Summit 2025



About Newton

Strategic delivery partners,
invested in your success

We turn complex strategic ambitions into plans which deliver measurable and meaningful impact. Global clients turn to us when challenges feel too big, too entrenched, or too resource-intensive to solve alone.

Global footprint, deep market expertise

With a worldwide presence and extensive market expertise, we operate across three core markets: Retail & Consumer Goods, Defence & Infrastructure and Public Sector.

Over the past twenty years, we have established a proven track record combining our unique blend of data-driven precision, proprietary tools, deep sector expertise, behavioural insight and hands-on collaboration.

Invested in the impact

We are committed to delivering transformative outcomes, so much so that we put 100% of our implementation fees at risk, 100% of the time.

Our talented teams work on the ground, across silos, and shoulder-to-shoulder with our clients to unlock value, embed change and deliver results that endure. Our people are united by a commitment to excellence, a belief in outcome-based results and a drive to go further, exceed our clients targets and help them innovate for tomorrow.



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Introduction

Wil Schoenmakers

Global Head of Retail and Consumer Goods



“I came away from Amsterdam full of hope, new connections and excitement for what we can all achieve together.”

With our work across the Consumer Goods and Retail Landscape worldwide, we think it's our responsibility to use our end-to-end viewpoint to help drive transformative growth – with and for clients, consumers and the communities we operate in. That is why we are delighted to partner with The Consumer Goods Forum and align behind its ambition to help deliver 'better lives through better business'.

It was inspiring to engage with other stakeholders at The Consumer Goods Forum Summit 2025, exploring how innovation, sustainability goals and operational excellence, supported by AI and technology, can supercharge every part of the global consumer goods and retail industry landscape.

There's no doubt that across the world, the retail and consumer goods industry is tough at the moment. Really tough! Optimism is in short supply. But, there are incredible opportunities open to us, if we have the confidence, evidence and partnerships to forge ahead. I came away from Amsterdam full of hope, new connections and excitement for what we can all achieve together.

This document outlines some of the insights myself and the Newton team have taken away. I hope you find it useful as you look to build resilience, grow confidently and delight consumers and customers.



Highlights and insights from the Summit

Beyond the sustainability trade-off

“You have the ability to create an economic and financial ecosystem which supports sustainable choices and solutions, and influence responsible business practice around the world.”

Her Majesty Queen Máxima of the Netherlands

As businesses, we need to find better ways of consuming what the planet gives to us. Big brands don't see this shift as being a trade-off between affordability, profitability and sustainability – it is just good business.

Aldi, for instance, is already experiencing supply chain disruption due to climate change, but is maintaining growth by building sustainability into its commercial models. One example of this is that science-based KPIs have been set to help protect farmers.

The story is similar at The Bel Group where sustainability has been reshaped so that it sits at the centre of the business and no longer within a silo. “Sustainability for us is not an enabler, it's a strategy,” said Cecile Beliot-Zind, CEO.

Newton view

Making decisions on key sustainability opportunities – from reducing packaging to identifying alternative supply options, factory improvements, re-formulations and optimising shipping options – requires leveraging digital, data and AI, coupled with deep knowledge of end-to-end value chains and, fundamentally, deep consumer understanding. We don't see it as an either/or: the best initiatives will achieve what consumers want in terms of value, convenience and quality while increasing sustainability.

But to deliver measurable impact and truly unlock possibilities, investments need to be made to fundamentally change how food is grown, processed, packed and eventually sold. Locked-in, longer-term retailer-supplier relationships were a crucial trend emerging from the Summit. These relationships aim to foster collaborative innovation but success hinges on understanding the minutiae of performance and the implications of any significant global changes.



“Circularity is a key concept, deeply embedded in nature. In nature, there's no waste; everything is about regeneration.”

Max Koeune
President & CEO, McCain Foods

AI isn't a silver bullet, with its greatest value requiring transformative thinking

“While there’s often concern that automation will replace humans, history shows it tends to complement them – shifting the types and nature of jobs over time.”

Dara Khosrowshahi, Chief Executive Officer, Uber

AI spending is predicted to hit \$644 billion this year (Gartner) and 75% of executives rank it as a top three strategic priority. But only 25% of execs are seeing significant value from AI with two-thirds of businesses struggling to reimagine workflows, drive change and hire the talent to scale tech (BCG).

In many organisations, AI isn't delivering significant value yet as focus has been on embedding it in tasks within silos, realising only small gains. Only 16% of organisations excel in the new engagement-driven landscape (SAP Emarsys) that AI enables. However, The Consumer Goods Forum Summit showcased companies that are leading the way by using AI to create personalised, experience-led stores.

At PepsiCo, agentic shopping assistants and smart carts are reimagining customer loyalty. “The future is driven by personalisation, sustainability and trust,” said John S. Phillips, SVP Customer Supply Chain and Go-To-Market.

Carrefour is focusing on mobility, shelf digitalisation and personalisation to transform stores into interactive spaces that enhance customer experience while increasing operational efficiency. “AI is a key part of our strategy, driving digital transformation,” said Emmanuel Grenier, Group E-Commerce, Data and Digital Transformation Director, “but with 90% of our sales still coming from physical stores, they remain essential to our success.”

75% of consumers are open to using a trusted AI-powered personal shopper that understands their needs and goals (Accenture). Already 1/5 people are knowingly using AI to assist with grocery shopping (dunnhumby). Brands and retailers need to have strategies to influence consumers and the AI-based bots that will drive behaviour.

Newton view

AI is bringing significant measurable, trackable benefits to our work, helping businesses go further, faster. The ever-evolving landscape of options can be overwhelming but for us, the start point is always the challenge, not the AI itself. Rigorous understanding of the benefit/impact matched with an eye on the end-to-end knock-on effect, are what ensures success. As well as developing bespoke in-house solutions, we partner with AI experts to access proven technologies.

“The message is clear: the future is here, and companies must adapt now or risk being left behind.”

The Consumer Goods Forum



This is a time of disruption, but customers still want to do what's right and be wowed

“At a time of change, we must stay focused on the consumer.”

PepsiCo

Despite consumers prioritising price amid global cost-of-living pressures, that's far from their only consideration. Value, quality, choice and availability remain key, but sustainability, wellness and personalisation are also emerging as significant drivers.

According to the Voice of the Consumer 2025 by PwC, decision complexity is growing, with food concerns including ultra-processed foods, pesticides, safety, additives and preservatives, and nutritional value. 82% of consumers worry about climate change and nearly half (49%) would pay more to support the health of the land and environment. But consumers are also excited about the opportunities of today and are “aspirational, health-focused and tech-driven”.

The picture is similar in the fast-growing global beauty industry with consumers wanting sustainable ingredients that are clinically-backed, as well as personalisation, wellness integration and sensorial experiences. 20% of consumers in the UK/US and 30% in China seek personalised and biometric products and 61% of consumers say

their primary motivation for conscious buying in the beauty sector is personal wellness benefits (Nielsen IQ). This trend is here for the long-term, with 70% of Gen Z prioritising wellness (McKinsey).

Consumers may be changing fast and expecting more, but they're open and engaged, with brands responding by investing in:

1. Agility

“The velocity of change keeps me up at night,” said Jose Antonio Fernandez Garza-Laguera, CEO at FEMSA RETAIL. The company is addressing this concern by innovating in regions, failing fast and adapting based on results.

Another example of agility was seen within a clothing company that revealed at the Summit how it was using AI to reduce timelines from 40 to 8 weeks.

2. Omnichannel

Engaging customers both in store and online has long been seen as the ideal state but the need for a seamless balanced experience has never been clearer.

For active GenAI users, the top source of product recommendations is physical stores, with AI coming in just 1% behind (Accenture).

People are spending more time alone and online. 90% of US consumers' free time is spent in solo activities. More than 80% of consumers in China, Germany, the UK and the US have shopped at an online-only retailer in the last month, with 19% YoY growth in food delivery since 2019 (McKinsey).

Consumers are open to new innovative ways to meet their goals with a third having used non-traditional food retailers in the last year, 70% using at least one healthcare app and 85% being comfortable using GenAI to support tasks (PwC).

Newton view

Will we ever realise the goal of emotional, story-led experiences at every touchpoint? Is it really achievable for every operational aspect – from supply chain efficiency, to product availability to the design of physical spaces – to be redesigned to enhance the customer experience? The answer is not a one-off change programme, it is an always-on culture change where everyone works closely from the supply chain to the shop floor, to continuously adapt details to the consumer of today with the innovative, always improving tech we have available.

“In a world focused on digital transformation and AI, human interaction remains essential”

Sunil Kumar
CEO, Spinneys



True collaboration across the supply chain will help tackle human issues on the frontline

“Transparency was a crucial first step ten years ago, but now we need real accountability and human rights due diligence as the most effective way to address forced labour in supply chains.”

The Rt Hon. Theresa May

Chair of the Global Commission on Modern Slavery and Human Trafficking, Former Prime Minister of the United Kingdom and Member of the House of Lords

86% of people in modern slavery are exploited by private sector actors (International Labour Organization).

It's in the power of leaders to challenge suppliers and equip teams on the ground to tackle slavery and sustainability challenges in the supply chain directly.

SPAR South Africa, for instance, is leading in this area, working with farmers and providing training to reduce waste and distances travelled.

“When experimenting with a big supply chain, we not only make sure we're efficient but also clear on our purpose and ambition.”

Chris Wright

Head of Nestlé Information Technology and CIO, Nestlé Group

“We'll be held accountable – by our shareholders, by our employees, the people we serve, and ultimately, by our children.”

Carter S. Roberts

President & CEO, World Wildlife Fund US

Newton view

The future, even in the near term, is emotive, it is personalised and it is radically different, requiring transformative change.

The answer to innovating and driving business growth in this complexity, isn't found through a traditional lens.

But the technology, tools, talent and thinking to power the future we all want and see are available today.

Our next steps as an industry require data, transformational AI, knowledge of end-to-end value chains and, fundamentally, human understanding.

Despite all the distractions, the noise and turmoil, the always-changing and rightfully demanding consumer remains – as ever – at the core of every decision, every moment on- and offline.



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