

A photograph of two women with curly hair, laughing heartily and raising their hands in a celebratory gesture. They are sitting at an outdoor cafe table with a glass of water and a plate of chips. The background shows trees and a bright, sunny day.

Reclaiming Relevance: sales and marketing in an AI world

State of Consumer Products Report
2026



The better the question.
The better the answer.
The better the world works.



Shape the future
with confidence

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Foreword

Last year, in *State of Consumer Products Report: Reclaiming Relevance*, we argued that Consumer Products companies needed to reassert their relevance with consumers, retail customers and capital markets. That challenge remains, but the context around it has changed.

Today, demand is increasingly shaped by algorithms.

Retailers are becoming platforms. Signals move faster, interact in more complex ways and influence purchase outcomes before consumers actively choose. In this environment, advantage depends less on any single decision and more on how decisions connect across the business.

Over the past decade, companies have improved performance in sales, marketing and supply chain. But the way decisions are made across those functions – how pricing, promotion, media and supply choices come together – was designed for a different era.

The next phase of transformation can't be incremental, but structural. It requires organizations to rethink how commercial decisions are made, how trade-offs are governed, and how demand creation and fulfillment are aligned in practice.

This is why we're publishing two companion pieces this year: one focused on sales and marketing, and one on supply chain. Together, they describe the journey to a more integrated model – one where demand and supply operate as one set of connected decisions rather than as separate functional priorities.

Most organizations are not yet designed to operate this way. The leadership opportunity is not simply to improve individual functions, but to redesign the operating model that connects them. The promise of technology in this is clear: AI can transform how decisions are made.

Real advantage will come from how organizations apply it across their commercial model, not within isolated use cases.

For me, the biggest value creation isn't AI in sales and marketing or AI in supply chain. It's the closed loop between the two – where demand signals and supply responses are aligned in real time. That is what enables relevance to be earned continuously. It's how to ensure your brands are not just visible, but selected, in the moments that matter.

This report is written for commercial leaders across sales and marketing who are responsible for delivering growth in Consumer Products. The companies that succeed will be those that recognize this shift early – and move with clarity and intent. We hope this report helps you take the necessary steps, and we look forward to working with you as you shape the future with confidence.



Rob Holston

EY Global and EY Americas Consumer Products Sector Leader



Winning

in a
system-driven
world



INTRODUCTION

Sales and marketing remain the growth engine of Consumer Products (CP). This is where brands live or die, where decisions directly translate into growth, margin and value. But the industry is entering a new phase of competition, where demand is increasingly shaped by algorithms, platforms and agent-led interfaces. Most companies remain anchored in operating models designed for a different era. AI and other technologies can help them win in this environment, but only if those operating models change.

Consumer Products companies have always competed for relevance with consumers, retailers and capital markets. Today, a fourth arena of relevance is emerging. Increasingly, decisions about what gets bought, recommended and prioritized are shaped upstream by algorithms, platforms and agents acting on behalf of shoppers.

Companies are now operating in a NAVI environment: nonlinear, accelerated, volatile and interconnected. Cause and effect are harder to isolate; signals travel faster; and demand is shaped through less predictable interactions rather than a stable, sequential path.

In that world, brands compete not only for attention or shelf space but for selection by systems they do not control.

Those platforms and agents do not respond to campaigns or relationships alone. They interpret signals, product data, pricing, availability and consumer feedback – all shaped by how pricing, promotion, media and supply are executed.

This shift is underway.

“This future isn’t arriving – it’s already here. Mainstream retailers already have tools that guide, educate and make decisions for the shopper,” said a Food Head of Sales. One CP Chief Customer Officer we interviewed predicted that by 2030, 80% to 90% of negotiation could be done through AI agents, adding: “We need to be ready for that.”

Even that timeframe is optimistic, said another Home and Personal Care (HPC) Chief Customer Officer. “I give it less than two years for the big players,” she said. “This is moving very fast.”

The most powerful retailers are accelerating investment in agent-led interfaces and automated decision models. The implication is not simply opportunity. It is exposure. In a sector already facing low growth and persistent volume pressure, even small shifts in how demand is allocated are significant.

“If consumer products companies don’t have a point of view and act as thought leaders, they’ll be hostage to whatever decisions are taken elsewhere,” said a Food Head of Sales. “Agents are increasingly interacting directly with the consumer ... and starting to shape how brands show up, rather than companies controlling it themselves,” said another commercial leader.

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This future isn’t arriving — it’s already here. Mainstream retailers already have tools that guide, educate and make decisions for the shopper.

FOOD HEAD OF SALES



However, most organizations are not yet structured to compete in this environment. Our research shows that companies are continuing to invest in pricing, promotion, media and portfolio optimization within disconnected operating models.

This is what we call the Optimization Trap.

They are getting better at individual decisions, but the market increasingly rewards those that connect decisions across their sales and marketing functions.

When that integration is missing, a gap emerges between insight and action.

This is what we call the Decision Gap.

It risks being toxic for CP companies, and the longer transformation is avoided, the more damage it does. This is not just a capability issue. It is a structural disconnect between time horizons, incentives and decision rights, playing out across the organization.

Closing that gap can look like a technology challenge, but it's primarily an operating model one. It requires leaders to rethink how commercial decisions are made; how trade-offs are governed; and how pricing, promotion, media and supply are aligned as a single set of choices.

In practice, this means moving beyond siloed decision-making toward end-to-end accountability for outcomes. As Gina Kelly, SVP and Chief Customer Officer, Clorox, said: "We're moving from functional to an enterprise mindset and approach."

Companies need to redesign how decisions are made across sales and marketing in ways that enable them to build relevance not only with consumers and retail customers, but with the platforms and decision mechanisms that increasingly mediate them.

Those that do not may not fail dramatically. They may simply be chosen less often, in ways that are hard to see until share has already shifted.

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Senior leaders are talking about building brands and long-term value, while much of the organization is focused on clicks and immediate ROI.

IAN MASKELL
Former VP Global Marketing, Unilever and Mars

Building a world-class brand in an AI world

Karen Crum, Strategy Partner
Laurence Buchanan, EY Studio+ Global Leader

As AI reshapes how brands are discovered, interpreted and chosen, it is exposing and amplifying a structural flaw in how most organizations manage brand. Brand has been treated as a marketing output, owned in silos and optimized through campaigns. In reality, it is one of the company's most significant financial assets, shaped by the entire system.

This is not a new issue, but AI is making it more visible. In an AI-driven environment, brand is no longer what you say. It is what the system reveals. But the system is not linear or deterministic. Brand behaves much more like biology than chemistry: shaped by multiple interacting signals that accumulate over time. Every signal, product performance, customer feedback, pricing, distribution and experience contributes to how the brand is understood and valued. Misalignment is no longer manageable. It is visible, persistent and value-destructive.

Most CMOs are not set up for this. The role has been built around communications and activation, not system governance. Yet the requirement now is to orchestrate alignment across functions, ensuring that brand strategy, product offering and customer experience reinforce each other consistently to protect and grow brand as a financial asset. This also changes the role of the CFO. Brand can no longer sit outside financial discipline as an intangible "goodwill" concept or be reduced as a "marketing cost." It must be treated as an asset with defined investment logic, risk management and performance accountability.

The global EY organization helps organizations move from siloed brand management to system-level governance, aligning CMO and CFO agendas and building the operating models, controls and assurance needed to improve brand value across the enterprise in an AI-driven market.



Optimization

is **necessary**, but it's not
enough

SECTION ONE

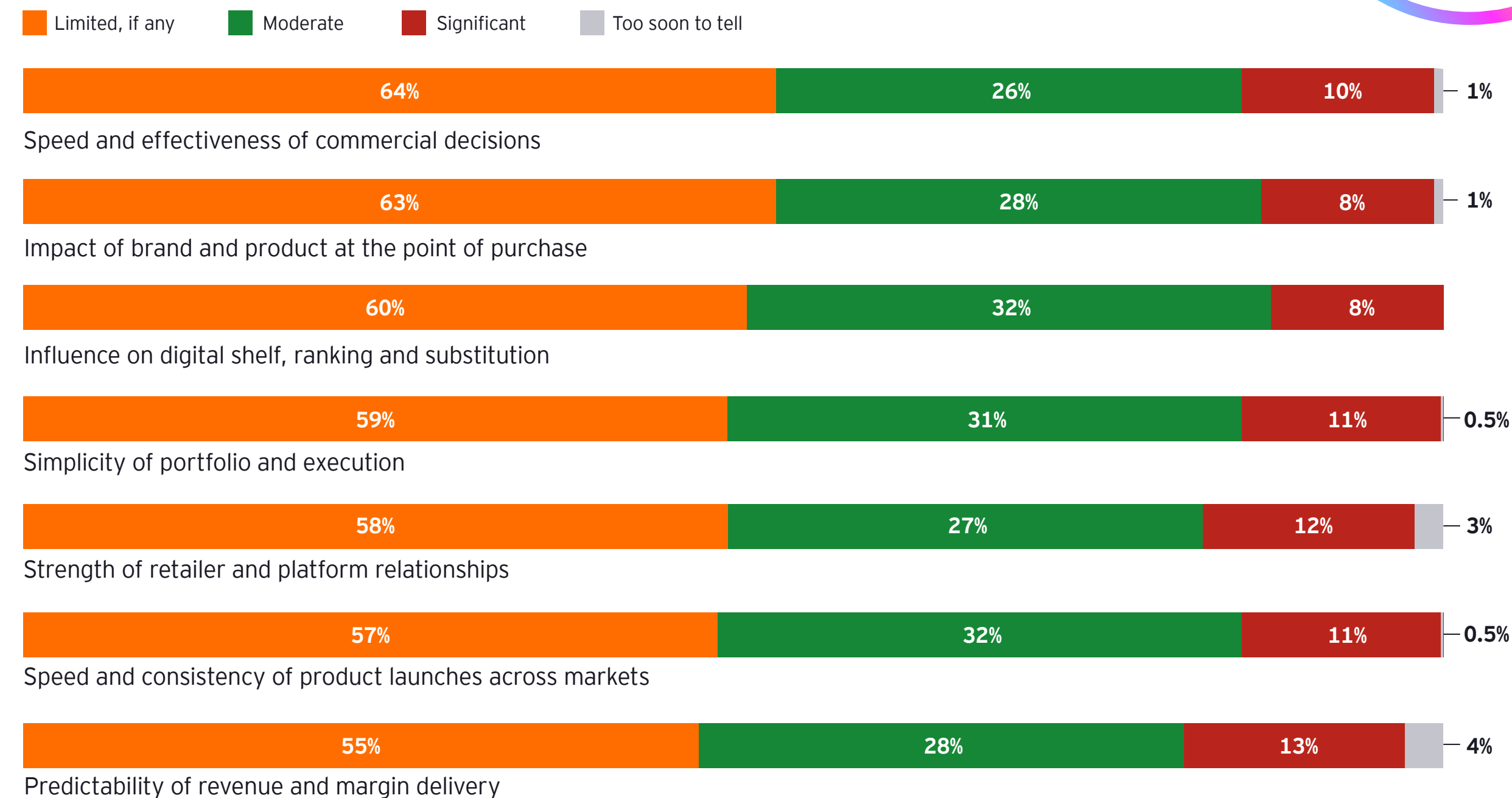
CP companies are facing acute pressure to drive growth through more effective sales and marketing. Many are trying to optimize how these core business functions work. But pulling the traditional levers of success with more insight and speed can leave you stuck in the Optimization Trap.

CP companies exist in a state of constant transformation, but the positive impact on brand and product effectiveness at the point of purchase is not moving the dial.

Significant improvement is also yet to be seen in key areas such as portfolio complexity, retailer relationships, speed to market and revenue predictability.

Transformation is happening, but value creation is lagging

To date, how much have your sales and marketing transformation initiatives improved each of the following areas?



Source: EY Consumer Products Dynamics Research 2026



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Most companies are still optimizing what they already do. Only a small group are redesigning how they work.

ASHISH CHATURVEDI
Executive Research Leader at HFS Research

SECTION ONE

Sales and marketing have always been the commercial growth and value engine for a CP company. But today that engine is leaking value, as two deeper shifts reshape the landscape.

The first shift is the continued rise of retailer power. Retailers are no longer just customers – they are competitors, platforms, gatekeepers and, in many cases, direct competitors. They control traffic, data and monetization through retail media networks and digital ecosystems. A standout data point in the *EY State of Consumer Products Report* last year was that 78% of retailers believe there will one day be room for just one mainstream brand per category on their physical shelves. In our research this year, three-quarters of CP executives say changing retailer expectations have become a major driver of transformation.

This shift is also changing the role of data. Historically, syndicated data provided a shared view of the market, giving suppliers and retailers a common basis for decision-making. That model is now fragmenting. Retailers operate on richer, proprietary first-party data, while suppliers increasingly rely on partial or lagging views. The result is not just better data, but asymmetric data and a corresponding shift in power.

As one CP leader said, “Retailers are getting more sophisticated, and suppliers are increasingly outmatched and under-prepared. Control is shifting to those who own the data, and today that’s the retailers.”

The second shift is in how consumers find and choose products. Algorithmic discovery and recommendation are rapidly becoming more influential in shaping demand. EY research shows that a meaningful minority of consumers already prefers to delegate purchasing decisions to AI or use AI to support their choices.

What is still minority behavior is scaling quickly. A growing share of demand is already being shaped upstream, within platforms and agents, before a consumer ever browses, searches or compares, narrowing the set of options that are even considered.

Our Joni vignette illustrates this shift. In a sector where volume growth is already under pressure, even small changes in how demand is allocated can have a disproportionate impact on share, mix and margin.

Joni: the decision you never got to influence

It’s 7:12 a.m. Joni, a working parent, is in her kitchen, phone in hand. She doesn’t open a retailer app. She doesn’t browse. She doesn’t compare products, packs or promotions. She says: “I need laundry detergent. Sensitive skin. Under \$10. Just order whatever makes sense.”

An agent responds instantly. It already knows what Joni bought last time, which retailers can deliver today, which products are priced out of line and which SKUs the retailer platform is prioritizing.

Options are evaluated. One is selected. The order is placed.

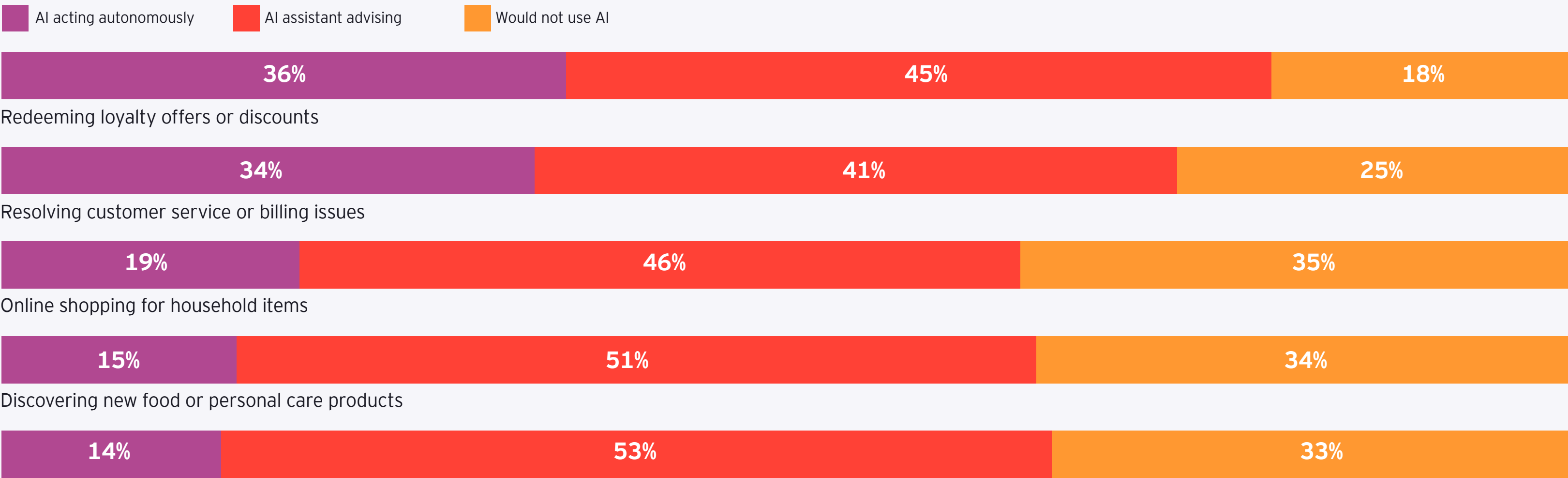
No search. No shelf. No campaign. No negotiation.

Later that morning, a category leader reviews the dashboard. Volume is slightly down. Share has edged back. Pricing looks stable. Media is on plan. Nothing appears broken. But something fundamental has changed.

Their brand was not rejected. It simply never entered the decision.

Consumers are becoming comfortable delegating decisions to AI

Here are some scenarios that could involve AI in your everyday life. For each scenario, please select which scenario you would prefer.



Source: EY AI Sentiment Index, 2026

*AI preference in each scenario

Note: Totals may not equal 100% due to rounding

In our vignette, Joni isn’t ignoring products because they are weak. Her buying journey is mediated by platforms and agents that select the best answer to the question the agent is asked.

This is no longer a distant scenario. Mainstream retailers already have tools that guide and make decisions for the shopper. In an agentic world, advantage will shift to brands that can influence both the signal and the response in the way Joni experiences. Growth is not won only in stores, campaigns or negotiations with human buyers. It is increasingly shaped upstream in algorithms, retailer platforms and agents acting on behalf of consumers and platforms.

Most sales and marketing organizations were not designed for that fight. Many are responding by increasing trade and retail media investment to defend visibility, but this doubles down on the old model, reinforcing dependence on retailer-controlled environments while doing little to influence how decisions are made upstream. Over time, that approach becomes harder to sustain.

SECTION ONE

Sam: a better shopping moment

It's Sunday afternoon. Sam needs to restock some household essentials for the week ahead. He opens his go-to shopping app.

There's no endless scrolling through similar options. Just a short list of the most relevant products.

Some he's bought before. Some are new.

There are different pack sizes, new variants, better value options based on current needs.

When he looks for coffee, a familiar brand stands out. It has a new brew to try in a smaller pack than normal. It would arrive by tomorrow morning. It's not the cheapest, but it's nice to start the week with something different. He says yes.

A quick purchase. No comparing. No second-guessing.

Why? Because it's not just personalized; it's aligned to the moment. It suits his laid-back Sunday afternoon mood. And the pack-size promotion makes the choice easy.

What happened? A brand shaped a moment.

Sam doesn't see the mechanisms behind that. He just experiences and values the outcome.

Our Sam vignette illustrates the opportunity for CP companies. A brand didn't just get his attention; it shaped the purchase. That outcome reflects more than strong execution in isolation. It comes from aligning pricing, promotion, media and supply in a way that works within the retailer and platform ecosystem shaping the decision. The product was surfaced, recommended and made easy to choose because it fit both the consumer need and the system through which that need was met.

This is what it means to build relevance in an ecosystem-driven market. Advantage comes not only from optimizing individual levers, but from ensuring they connect in ways that influence how decisions are made upstream. Companies that succeed will be those that can act as true partners to retailers and platforms, shaping the category together rather than competing only at the point of sale.

The risk for large companies is that this level of alignment is often hardest to achieve at scale. Complexity fragments decisions across brands, categories and markets, making it harder to act with the same clarity and speed, and harder to align effectively with the retailer and platform ecosystems shaping demand.

By contrast, many insurgent brands are built around a much tighter definition of relevance. They focus on a specific need, a specific consumer and a narrower set of choices. That focus allows them to align pricing, proposition, media and distribution more consistently, and to show up more coherently within the systems that determine which products are surfaced and selected.

As Ian Maskell, former VP Global Marketing, Unilever and Mars, stated, "CPG is being nibbled away by piranhas ... and those piranhas are increasingly powerful." Individually, these brands are small. But collectively, they are capturing share in ways that are difficult for larger organizations to see early, and even harder to respond to once momentum builds.

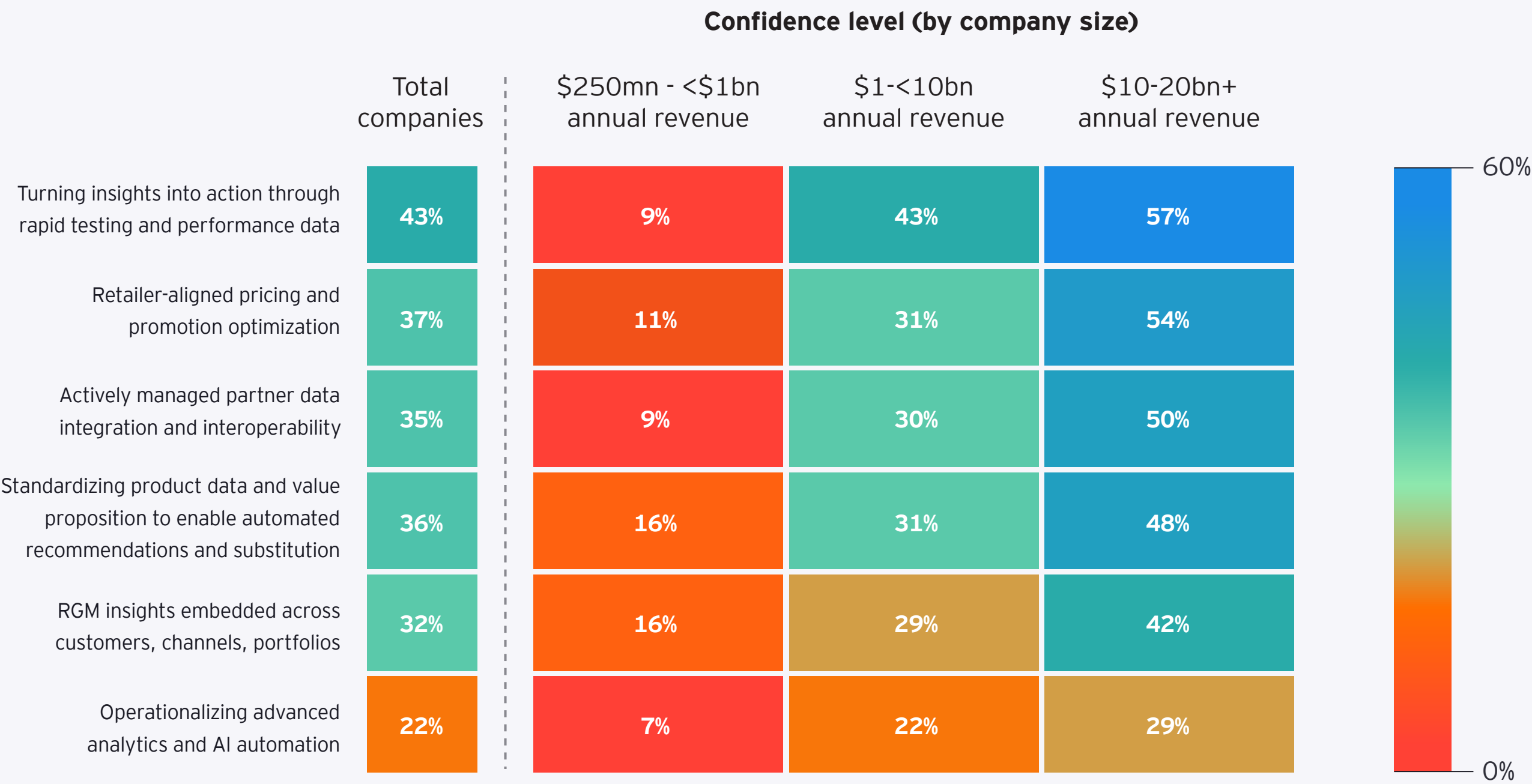
However, the data suggests this is not the whole story. Larger companies show significantly higher confidence in the capabilities that matter most in this environment, particularly in translating insight

into action, coordinating decisions with retailer and platform logic, and integrating data with key partners. Their advantage is not simply greater scale or access to analytics. It is the ability to connect decisions, operationalize them consistently and engage effectively in increasingly system-led routes to market.

The challenge is not whether large companies can compete, but whether they can bring these capabilities together with the same focus and coherence that smaller brands achieve by design, while also shaping the ecosystems in which those decisions are made.

Confidence in capability grows with scale, but does it always equate to readiness?

% of respondents who are very or extremely confident in their company's commercial capabilities in the following areas.



Source: EY Consumer Products Dynamics Research 2026; EY Insights analysis

SECTION ONE

Avoiding the Optimization Trap

As CP companies enter this new era, most are focusing on what they can control. They are leaning harder on revenue growth management (RGM) and portfolio management, with 61% prioritizing value-led growth over volume-led growth.

Done well, this kind of optimization can deliver immediate value and remains essential in a challenging environment. But without a clear view of how the commercial operating model needs to evolve, its impact diminishes. Companies become better at optimizing decisions within the current model while leaving the underlying decision logic unchanged. Ultimately, tomorrow’s decisions are made on yesterday’s operating system. Over time, this becomes the Optimization Trap.

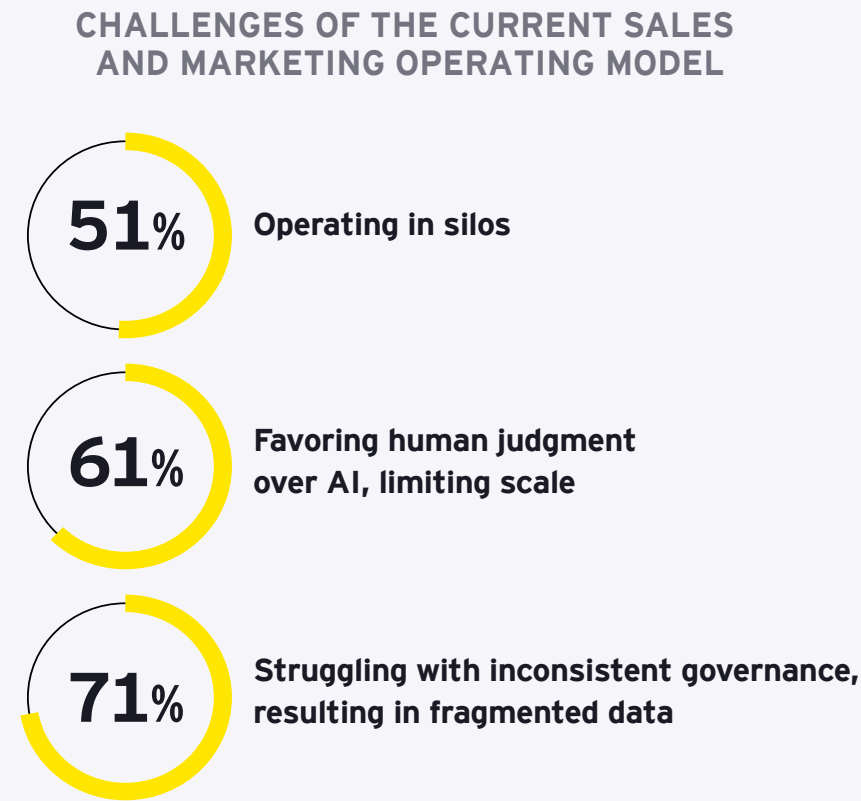
Companies can avoid the trap by ensuring that today’s improvements are made with a clear direction of travel in mind. The goal is not just to optimize performance within the current model, but to build toward the capabilities that will define advantage in the next.

AI-driven optimization and more efficient end-to-end decision-making are increasingly essential, but they will not differentiate for long. They are becoming the baseline. Advantage will come from shaping how decisions are made upstream, integrating brands into retail and platform ecosystems, and building trusted product signals that AI agents recognize and prioritize.

Confidence, however, remains low. In our research, the ability to influence algorithmic recommendations is identified as the single most important future source of competitive advantage in sales and marketing, yet only 21% of executives are confident in their organization’s ability to deliver it today.

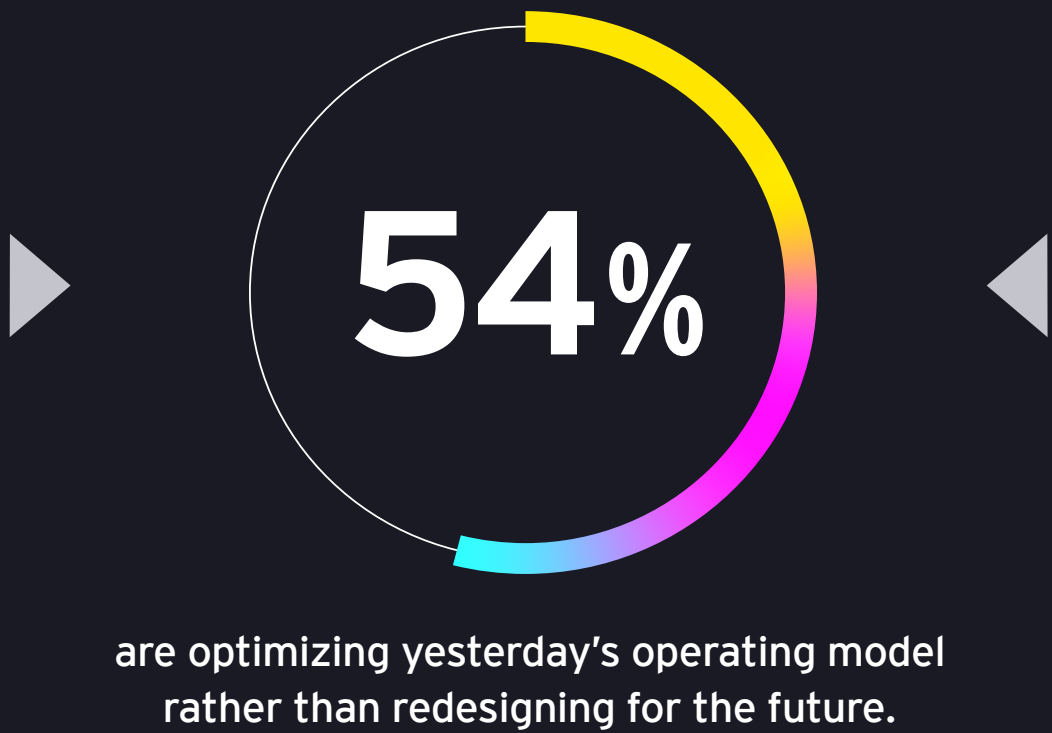
Companies are falling into the Optimization Trap

The current enterprise system isn’t sufficient, leaving value on the table.



Source: EY Consumer Products Dynamics Research 2026

Too many fall into the **optimization trap**, refining legacy processes instead of redesigning for the future.



Decision systems can’t keep up

Sales and marketing typically draw from the same investment pool but operate in separate functions with different KPIs and disconnected data. Only 11% of executives say their teams operate as a unified growth engine, and just 15% say commercial data is fully integrated and routinely used to drive cross-functional decisions.

Culturally, the two functions often work in different ways. They are oriented around different time horizons, metrics and definitions of success. Sales prioritizes near-term delivery, customer outcomes and in-market execution, moving quickly to capture value and respond to change. Marketing focuses more on building brand, shaping demand and strengthening performance over time across markets and channels.

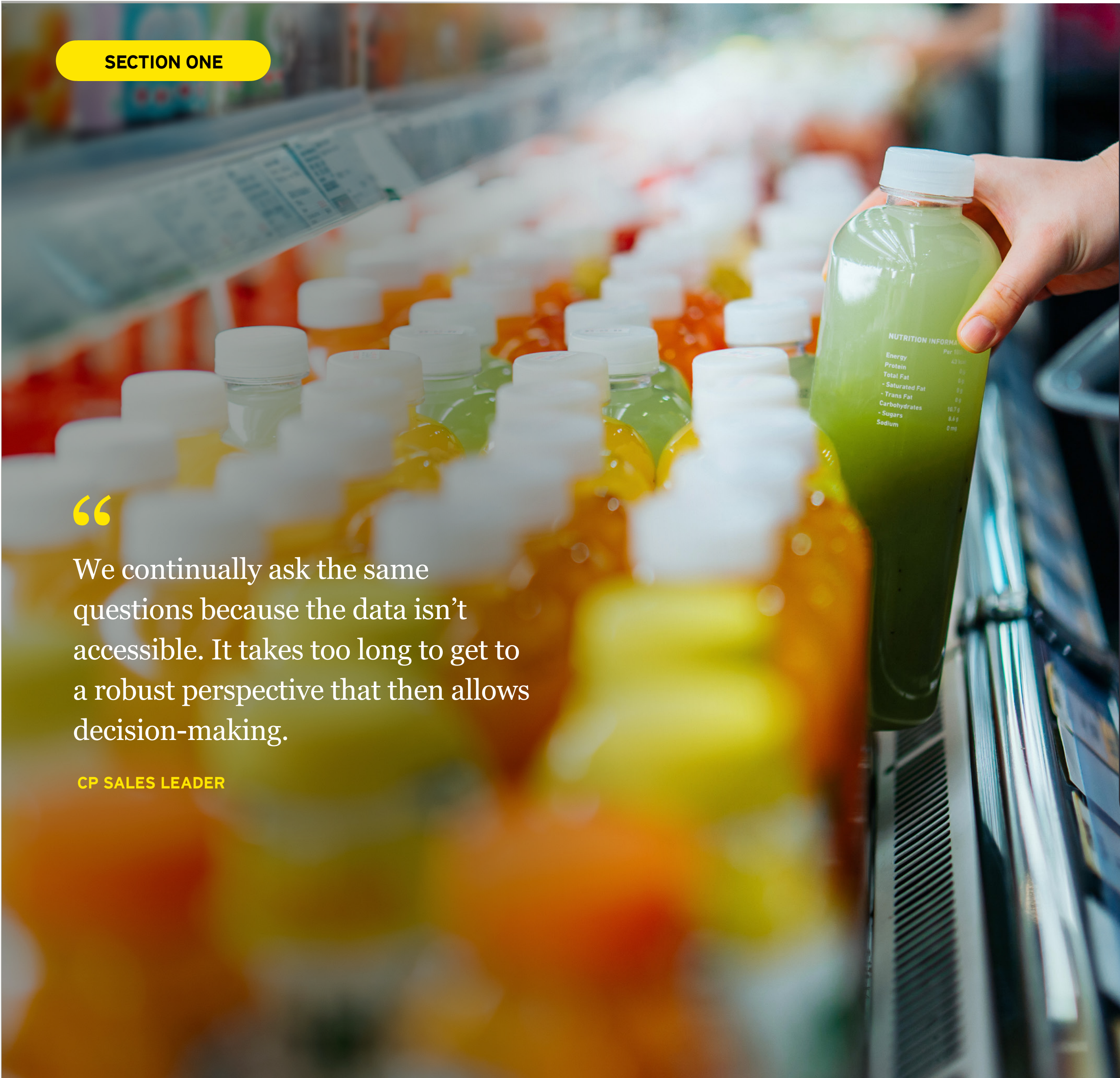


These differences are not the problem in themselves. The issue is that they are not reconciled. Without a shared commercial logic to connect them, organizations improve performance in parts of the business without improving how decisions work together across the whole. The result is a growing mismatch between the speed and quality of decision-making and what it takes to win in the market. This misalignment often shows up first as a data problem, but it is rooted in how decisions are structured, governed and owned across the organization.

In practice, it surfaces as friction, delays and rework. As one CP sales leader stated, “We continually ask the same questions because the data isn’t accessible. It takes too long to get to a robust perspective that then allows decision-making.” Another Food commercial leader added, “We don’t have data consistency or accessibility. It makes it hard to move from insight to decision.”

Seventy-six percent of executives say a central priority of transformation should be enabling simpler, faster and more integrated decision-making that increases speed to market.

But insight and action will only drift further apart if organizations generate more intelligence without changing how decisions are made and governed.



SECTION ONE

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We continually ask the same questions because the data isn’t accessible. It takes too long to get to a robust perspective that then allows decision-making.

CP SALES LEADER

CASE STUDY

Asahi: connecting revenue growth decisions with AI

The global EY organization is working with Asahi Europe & International to reshape how revenue growth decisions are made and connected across markets. Rather than relying on fragmented processes and local spreadsheets, the company has built a more integrated approach linking data, insight and action across sales and commercial teams.

AI-enabled tools now support a continuous decision process across trade promotion and execution. Descriptive, predictive and prescriptive capabilities are combined to analyze performance, generate recommendations and forecast outcomes. This allows teams to move from manual analysis to faster, more consistent decision-making, grounded in a broader set of data.

Commercial decisions are now more directly connected to execution. Sales teams can access insights quickly, test scenarios and take informed recommendations to customers. This reduces time spent reconciling plans and increases focus on acting on them.

The result is a more connected commercial model, where decisions are made with greater speed and consistency, and carried more effectively into the market. It also builds trust in data and tools over time, supporting adoption across markets.

The impact includes:

- 60% year-on-year growth in daily tool usage across markets
- Analysis of hundreds of promotions within 24 hours, facilitating faster customer engagement
- Faster forecasting and decision-making, facilitating more effective negotiations and improved outcomes for customers and the business

When bots do the buying: commercial control and customer

John Dubois, EY Americas AI Strategy Leader
Lokesh Ohri, EY Global and EY Americas Consumer and Health Consulting Leader

Many buying decisions are already moving beyond human interaction. Retail platforms, automated replenishment systems and early forms of agent-driven commerce are changing how products are selected, ordered and prioritized.

Traditional levers of influence – relationships, negotiation, in-store execution – are important, but they are not the only route to market impact. Visibility within platforms, access to data and the ability to shape how products are surfaced and selected become equally critical.

Many organizations already rely on retailers or platforms for consumer insight, limiting their ability to understand demand directly. As decision-making becomes more automated, that distance can increase, with fewer opportunities to intervene once choices are made.

To keep influence, companies might need to build stronger direct channels, improve access to customer and consumer data, and work out how to ensure their products are positioned effectively in automated systems. It also requires clarity on how commercial, marketing and digital teams work together, as these decisions no longer sit within a single function.

The global EY organization is helping Consumer Products companies find where buying decisions are shifting, assess the implications for control and visibility, and redesign how they engage with customers and platforms in response.

Commercial decision hurdles: price thresholds and promotional depth

Gerrit Iwanovski, EY Global Consumer Commercial Excellence Leader
Alex Hanmer, EY Global Consumer Revenue Growth Management Leader

Pricing and promotion decisions are shaped across multiple teams before they reach the market. Sales and marketing adjust plans as they move through the organization, often working to different assumptions and priorities. The result is that decisions are reworked several times before they are executed.

With promotional activity, plans are set, then revisited as conditions change, availability shifts or local teams ask for adaptations. That shouldn't be a problem, but significant effort goes into aligning plans rather than acting on them. Pricing follows a similar pattern. Decisions aren't taken and acted on; they're adjusted as they move through the organization.

What's missing is clarity. The practical shift is to define where pricing and promotional decisions are made, what they are based on and who is accountable for them. Execution will then more closely reflect intent.

The global EY organization is working with Consumer Products companies to define and govern these decision points in practice, across sales and marketing.



The technology

is ready; most operating models
are not

SECTION TWO

Competitive advantage will increasingly depend on how well companies connect pricing, promotion, media, portfolio and supply into a single commercial decision system. AI makes that integration of sales and marketing decisions technically possible. But most organizations are not yet designed to harness its power. The risk is that a toxic Decision Gap gets worse, not better.

How do you close the gap?

The traditional commercial model in Consumer Products was built for a different era. Marketing built the brand. Sales negotiated shelf space. RGM, optimized price, promotion, trade and price pack architecture. Supply chain fulfilled demand. Each function had a clear role, and the system worked when growth was predictable and the commercial environment moved at a slower pace. Today that model is under strain and, in some organizations, no longer fit for purpose.

As commercial decisions become more interconnected, value is increasingly lost at the points where functions meet and decisions fail to carry through coherently. As one CP chief information officer (CIO) observed, "The reality today is islands of data. Sales' view of the world sits independently of the physical reality of supply and asset capability."

When organizations generate more intelligence but that intelligence remains inside functions – built on siloed data and used to optimize isolated decisions – the Decision Gap widens as insight fails to translate into coordinated action.



SECTION TWO

Closing the Decision Gap

Closing the Decision Gap requires more than stronger analytics or faster tools. Commercial decision-making must become an integrated way of working. Pricing, promotion, media investment and portfolio strategy increasingly need to be managed as a connected capital allocation challenge rather than a series of separate functional decisions. That shift requires shared decision infrastructure, common performance metrics, cross-functional accountability and stronger leadership alignment around commercial priorities.

The first move is not technological; it is organizational.

Companies need to redesign how sales and marketing connect around a shared commercial logic and common decision rules and KPIs.

As Ashish Chaturvedi, Executive Research Leader at HFS Research, stated, “Anything that can be easily added as a feature in a SaaS tool becomes table stakes. Competitive advantage comes from organization rewiring, change management and data systems.” The question is no longer whether to use AI. It is how organizations rewire around it.

Kraft Heinz provides a clear example of how this shift is already underway ([see case study](#)). But most organizations remain some distance from operating this way. Even where Integrated Business Planning (IBP) has been introduced, only around 19% of companies say demand, supply and financial plans are truly integrated into a single end-to-end decision process.

More than half of organizations remain in the early stages of integrating their commercial operating models. And while cross-functional coordination is widely recognized as important, just under one-fifth of executives say they are highly confident in their ability to make efficient, end-to-end commercial decisions.

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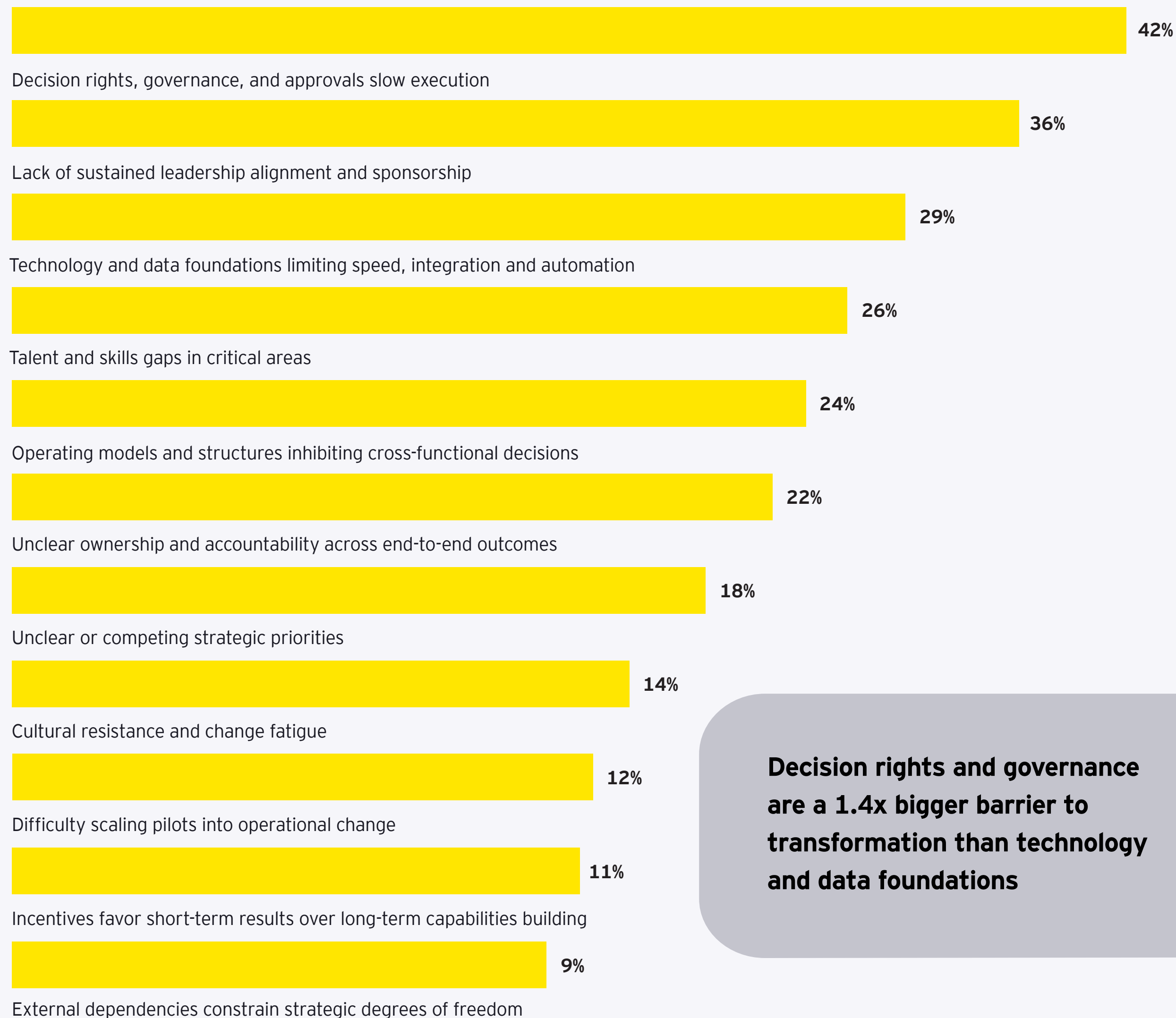
Companies should focus on augmenting employees before transforming the model. The risk is using AI to do the same things faster.

RENAUD DANIEL

SVP MDS Marketing, Sales, eCommerce and Regional CIO, Mondelez Europe

Barriers to transformation are often self-inflicted

Which of the following barriers most limit your company's ability to transform today?



Source: EY Consumer Products Dynamics Research 2026

Decision rights and governance are a 1.4x bigger barrier to transformation than technology and data foundations

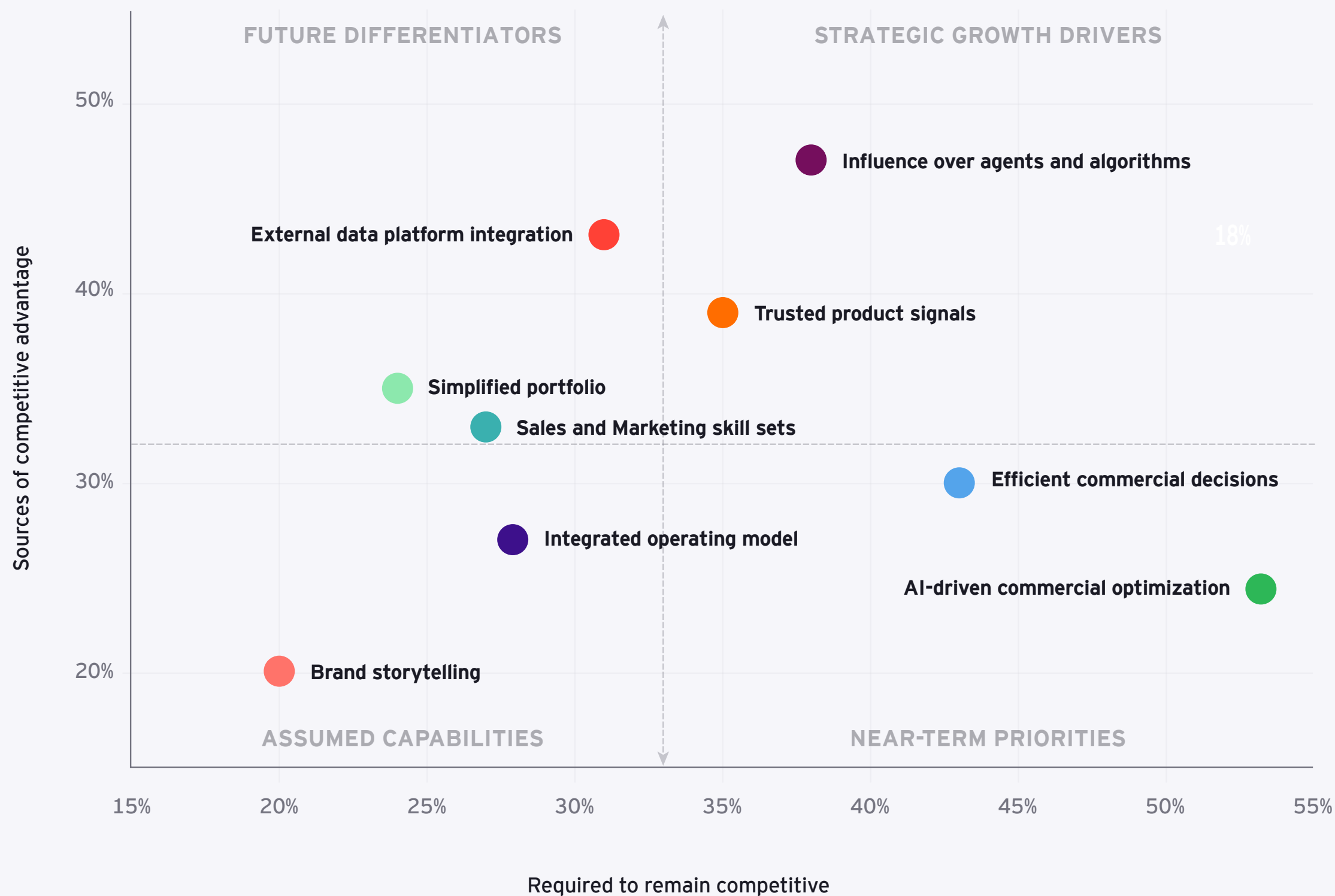
SECTION TWO

This is not a problem confined to a few emerging capabilities.

Confidence remains low across all major commercial capabilities. Those seen as most critical to future advantage are not areas where organizations feel strongly equipped to deliver. For example, while 47% of executives see influencing algorithmic recommendations as a source of advantage, only 21% feel extremely confident in their ability to deliver it. Executives say they are highly confident in their ability to make efficient, end-to-end commercial decisions.

Long-term value creation pivots on ability to influence agents and algorithm

To date, how much have your sales and marketing transformation initiatives improved each of the following areas?



Source: EY Consumer Products Dynamics Research 2026



A similar pattern holds across all capabilities, from retail integration to end-to-end decision-making. This suggests the challenge is not isolated capability gaps, but a broader issue with how the commercial function operates.

The reason is that integration raises difficult organizational questions. Who owns the integrated commercial capital pool? Are trade and media budgets working toward the same outcomes and measured by the same KPIs? What is the right balance between global strategy and local decision rights?

Local insight will remain critical, but the incentives that govern the model must also evolve. If performance metrics reinforce functional priorities rather than overall outcomes, organizations will struggle to fully capture the value of integrated commercial decision-making.

No company will move overnight from disconnected processes to a fully connected commercial model, but the direction of travel is clear. Companies that begin redesigning how commercial decisions connect across the organization will steadily close the Decision Gap – and unlock the full potential of the technologies now reshaping the industry and consumer purchasing journey.

- Influence over agents and algorithms**
Shaping how products are ranked, recommended, and substituted will be the biggest future advantage.
- External data platform integration**
Integrating with retailers, APIs, and data ecosystems embeds brands in decision systems – a key differentiator.
- Trusted product signals**
Clear, verifiable product information builds trust and improves platform performance.
- Efficient commercial decisions**
Faster, end-to-end decisions across pricing, promotion, and assortment are critical to compete.
- AI-driven commercial optimization**
Applying AI to pricing, promotion, and assortment enables continuous optimization and automation.
- Sales and Marketing skill sets**
Strong data, content, and tech capabilities enable more agile, insight-led decisions.
- Simplified portfolio**
Simplification improves clarity and execution, but is increasingly a baseline.
- Integrated operating model**
Aligning Sales and Marketing enables coordinated, system-level performance.
- Brand storytelling**
Builds emotional connection, but no longer differentiates in an agent-driven environment.

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Innovation is a team sport, one that brings specialists together from nearly every part of the business. To do this well, at the speed the market demands, it has to be anchored in a culture of knowledge sharing, strong governance and accountability, and the platforms to connect. When everyone is working from the same single source of trusted facts, we make better decisions faster, scale what works and turn ideas into impact.

THOMAS PYSCHNY

EY Global Innovation Excellence Capability Leader

Kraft Heinz: connecting innovation decisions with AI

Global EY teams are working with Kraft Heinz to reshape how innovation decisions are made and connected across the organization. AI plays a central role. Rather than treating innovation as a series of discrete stages, the company has built a more integrated system that links idea generation, evaluation and planning into a continuous, data-driven process. It supports faster analysis, more consistent decision-making and clearer prioritization, helping teams focus on the ideas most likely to succeed.

This approach connects innovation more directly to commercial outcomes. Decisions on portfolio, investment and activation are increasingly aligned, reducing fragmentation and duplication. The result is a more streamlined innovation system, where insights flow more easily across functions and into planning. This improves speed to market, reduces costs and increases the value delivered from innovation.

The impact includes:

- Substantial increase in portfolio value through a single integrated approach
- Significantly reduced number of required approvals through streamlined governance
- Dramatically improved ability to lift and launch from one market to another from modular project frameworks

Analytics won't differentiate. Decision-making will.

Steven Bailey, EY Americas Commercial Excellence Leader
Euan Holms, EY UK&I Consumer Products Sector Leader

Advanced analytics needs to move beyond specialist teams. Capabilities that once sat within Revenue Growth Management are starting to spread across the organization, with wider access to tools, models and insight. That will change how decisions are made.

Then, instead of a central team analyzing and recommending, more functions can act directly on the same underlying intelligence. Pricing, promotion and assortment decisions become less dependent on a single group and more embedded in day-to-day commercial activity.

But this does not mean advantage disappears. Access to data will still be uneven, meaning retailer relationships, category position and investment will influence who sees what, and how quickly.

If access to data converges, the sources of advantage will shift again. The differentiator becomes how decisions are made, how consistently they are applied and how effectively teams act on the outputs.

The implication is twofold. First, organizations need to build confidence in using analytics more broadly, not just within specialist teams. Second, they need to be clear about where advantage will come from as access expands – in data, in relationships or in how decisions are executed.

The global EY organization is working with Consumer Products companies to embed advanced analytics across commercial teams, while helping them identify where sustainable advantage will sit as access to data and tools evolves.

IBP: integration in theory, disconnection in practice

Olivier Gergele, EY-Parthenon Asean and Singapore Consumer Leader
Abbie Liederman, EY-Parthenon US Consumer Senior Director

Integrated Business Planning (IBP) is widely seen as the right model. But in practice, most organizations are struggling to make it work. The problem isn't lack of process: planning cycles are in place; systems are in place. It's more about how decisions are made.

"Most companies say they have IBP. In reality it's a mixed bag of manual processes and partial integration," said Ashish Chaturvedi, Executive Research Leader at HFS Research.

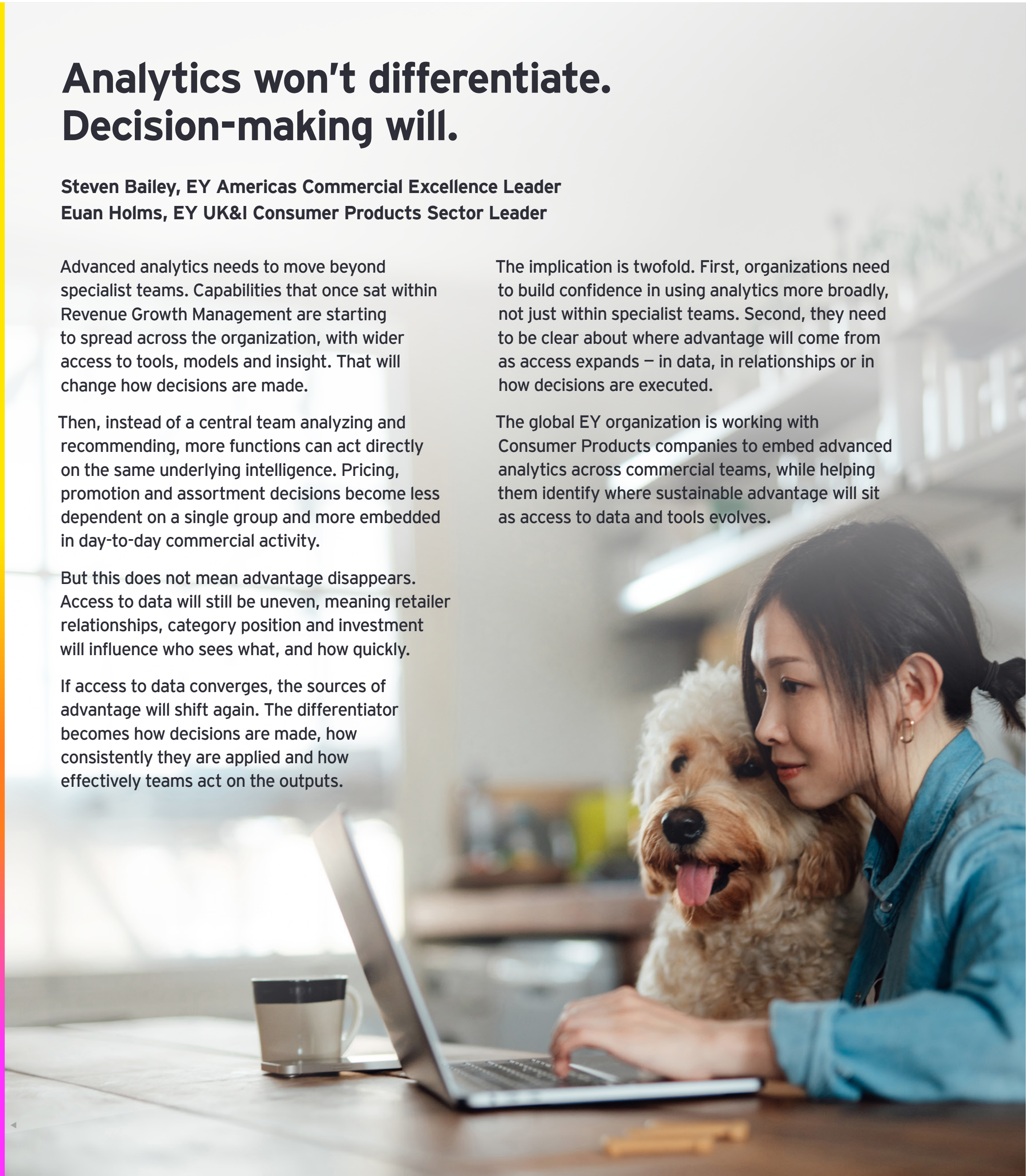
Demand, supply and commercial teams continue to work to different assumptions, incentives and time horizons. The result is visible: promotions planned against constrained supply, forecasts adjusted locally, and significant effort spent reconciling numbers rather than acting on them.

Two constraints tend to sit underneath this. The first is trust. Where teams don't understand how forecasts are generated, or don't feel accountable for them, they override them. This undermines the idea of a single, shared view of the business.

The second is ownership. It remains unclear who owns decisions that cut across silos. Without that clarity, IBP becomes a coordination layer, but not a decision system.

Fixing that is about more than improving the planning process. It comes from clarifying decision ownership and aligning incentives around shared outcomes.

The global EY organization is helping Consumer Products companies focus on these decision points – clarifying ownership, aligning incentives and embedding more integrated ways of working.



Finding your path to connected decision-making



SECTION THREE

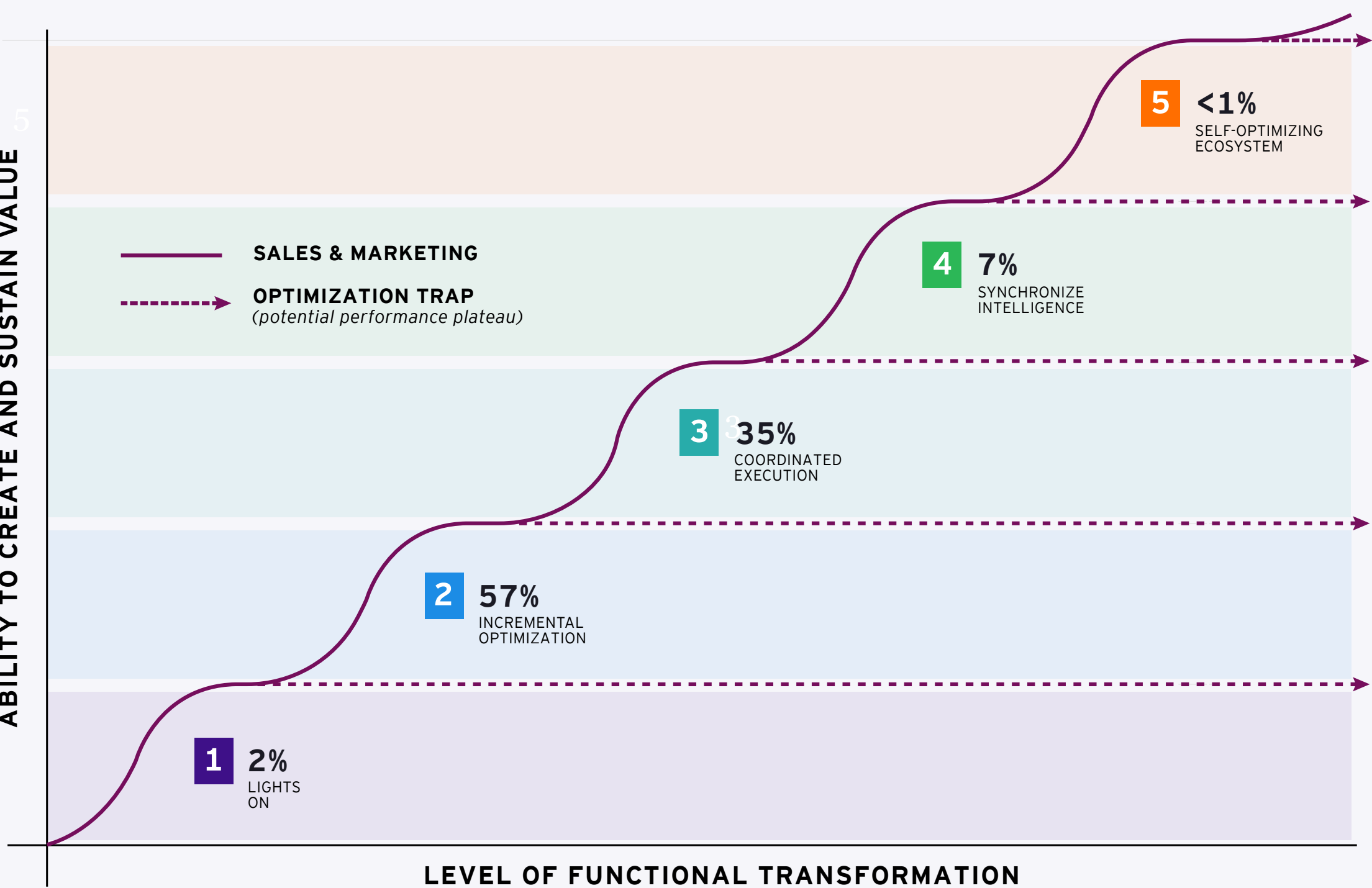
Most Consumer Products companies remain early in the transition from fragmented commercial execution toward integrated decision systems. The sales and marketing maturity ladder shows how organizations move along that journey. AI increases the urgency of the shift, but operating model maturity ultimately determines how much value companies can create from it.

The maturity ladder helps leadership teams assess where their organization sits today – and whether transformation efforts are focused on incremental optimization or true system redesign. Without intentional redesign, organizations risk falling into the Optimization Trap, where local execution improves but the ability to create enterprise-level value through connected decision-making slows.

Lack of leadership alignment is driving Governance Turn

- 31% say their leadership is aligned on a clear long-term roadmap for commercial transformation
- 36% cite lack of sustained leadership alignment as a transformation barrier
- 42% share governance and decision rights slow transformation

Finding your path to connected decision-making



At most points on the ladder, the priority is not simply to deploy additional technology, but to do so in lockstep with strengthening the operating model – clarifying governance, aligning incentives, integrating data and redesigning decision infrastructure across sales, marketing, pricing and supply before applying AI or advanced analytics to optimize those decisions.

Many organizations attempt to integrate processes and tools before they address governance. Over time, that sequence limits progress.

Eventually, organizations reach a point where process integration is no longer enough and governance must be addressed directly. We call this the Governance Turn. It marks the shift from incremental improvement to structural progress and is where transformation most often slows down. Making the turn requires a purposeful step change in mindset and investment, but many companies take their foot off the gas. Thirty-eight percent of marketing and sales leaders say governance and decision rights slow transformation, while 33% cite lack of sustained leadership alignment.

To move through this point, leadership teams need to resolve questions that have often evolved over decades. Who controls the commercial capital pool? How are trade and media investments coordinated? Where do global strategy and local market autonomy meet?

Most companies have yet to resolve these governance questions. The average sales and marketing maturity score across the industry is 2.9, placing most organizations in the emerging stage of transformation. Fifty-eight percent remain in foundational or emerging stages, while only 7% operate at advanced or leading-edge maturity.

1	2	3	4	5
LIGHTS ON	INCREMENTAL OPTIMIZATION	COORDINATED EXECUTION	SYNCHRONIZE INTELLIGENCE	SELF-OPTIMIZING ECOSYSTEM
Driving stability and business continuity	Reducing operating friction and amplifying outcomes	Executing consistent, data-enabled approach/outcomes	Making better, future-looking decisions faster	Enabling always-on ecosystem optimization
Maintaining day-to-day operations, with teams working largely independently and relying on manual processes; some baseline data, reporting, and controls, however, decisions remain fragmented and largely backward-looking	Building alignment across teams around shared priorities and key moments, improving coordination and increasing the use of data in decisions around common decisions, with decisions still negotiated function-by-function	Establishing and executing against an integrated commercial plan with shared planning cycles and aligned priorities informed by data and platform insights to deliver consistent and aligned execution and decision making across teams	Integrating data, systems, governance, and teams into a unified growth engine that connects insights, decisions, and execution to support faster, and more proactive and strategic forward-looking actions	Operating as a connected, AI-enabled ecosystem that automates execution and emphasizes strategic stewardship and orchestration, continuously improving decisions and performance across internal org and external partners

Source: EY Consumer Products Dynamics Research 2026

*Percentages represent the proportion of surveyed companies currently operating at each stage.

SECTION THREE

Solving the Maturity Paradox

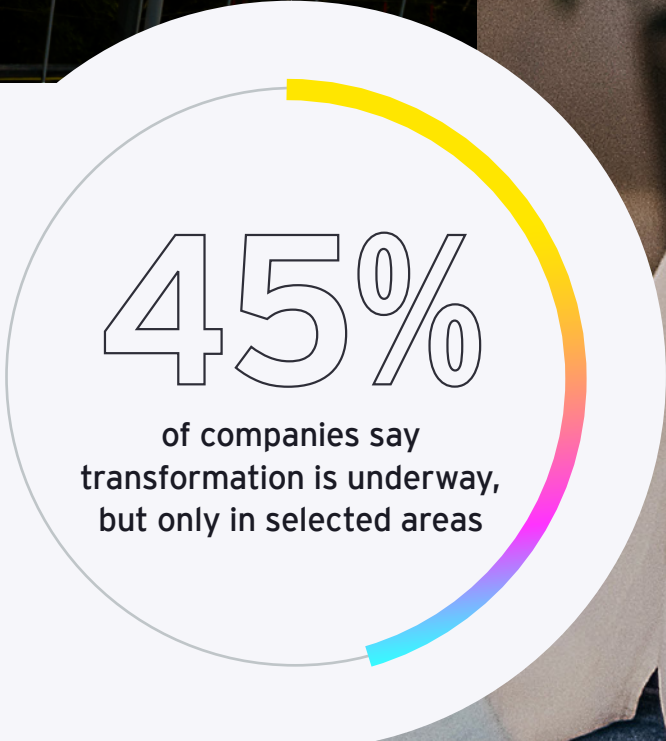
Some capabilities progress quickly while others lag. This is reflected in our survey, with 45% of companies saying transformation is underway, but only in selected areas. Only 10% say the new operating model is fully embedded.

Organizations need to move forward more deliberately. This is not just about staying relevant in the market today. It is about avoiding a larger investment and capability challenge tomorrow. Our research shows that the more mature sales and marketing organizations become, the more aware they are of the importance, and difficulty, of this transformation work.

This is what we call the Maturity Paradox.

Less-mature sales and marketing organizations underestimate the urgent need for deeper operating model change. While they often lack confidence in their current capabilities, they remain relatively optimistic about the future. More than half believe the current commercial model remains broadly fit for purpose or requires only selective improvement.

By contrast, more advanced organizations are more confident in their ability to execute but more cautious about what lies ahead. Yet more than 60% of them say material transformation is already essential.



Connecting field sales execution with AI

The EY organization is working with a global consumer products company to transform how field sales teams access insight and execute commercial decisions. The business now has a unified platform that puts actionable insights, performance tracking and enhanced data at sales reps' fingertips.

Designed with inputs from representatives at the fore, the platform supports rep-led functionality and adoption. AI-enabled tools integrate multiple data sources and apply advanced analytics to surface relevant insights and guide prioritization, leading to faster, more confident decision-making.

Sales teams can now engage customers with tailored recommendations supported by real-time data and scenario analysis, while repetitive tasks are reduced, allowing greater focus on relationship building and commercial impact.

The result is a more consistent and scalable approach to sales execution, with insight embedded into frontline activity, improving the quality of customer conversations and supporting adoption of data-driven ways of working.

The impact includes:

- 88% of sales reps reporting increased confidence in customer interactions following AI-supported preparation
- 75% of users expressing strong engagement with AI-enabled tools during pilot phases
- Increased adoption of digital tools, facilitating scalable deployment across markets
- Improved quality and consistency of sales conversations, supporting more effective customer engagement

Acting

before
the model **is clear**



SECTION FOUR

Leaders cannot wait for certainty. The challenge is to act now, making choices that deliver performance today while building the commercial model needed for what comes next.

Executives are divided not just on the pace of change, but on the shape of the future model itself. Thirty-six percent expect a gradual evolution, where AI improves efficiency and targeting but the core commercial model remains intact. A similar share anticipates a more fundamental and transformative shift, with sales and marketing redesigned around continuous, data-driven decision systems and agent-influenced demand.

Others expect more constrained or disrupted outcomes. In some scenarios, regulation, platform rules and fragmented data limit how far transformation can go, increasing complexity and favoring simplification. In more extreme cases, disruption to digital and automated systems forces a reversion to more manual, locally driven models.

“People tend to wait for the perfect data platform before they move, but starting with perfect integration is the wrong strategy.

TÖRE BIROL
Global Customer Excellence Leader
at Henkel Consumer Brands

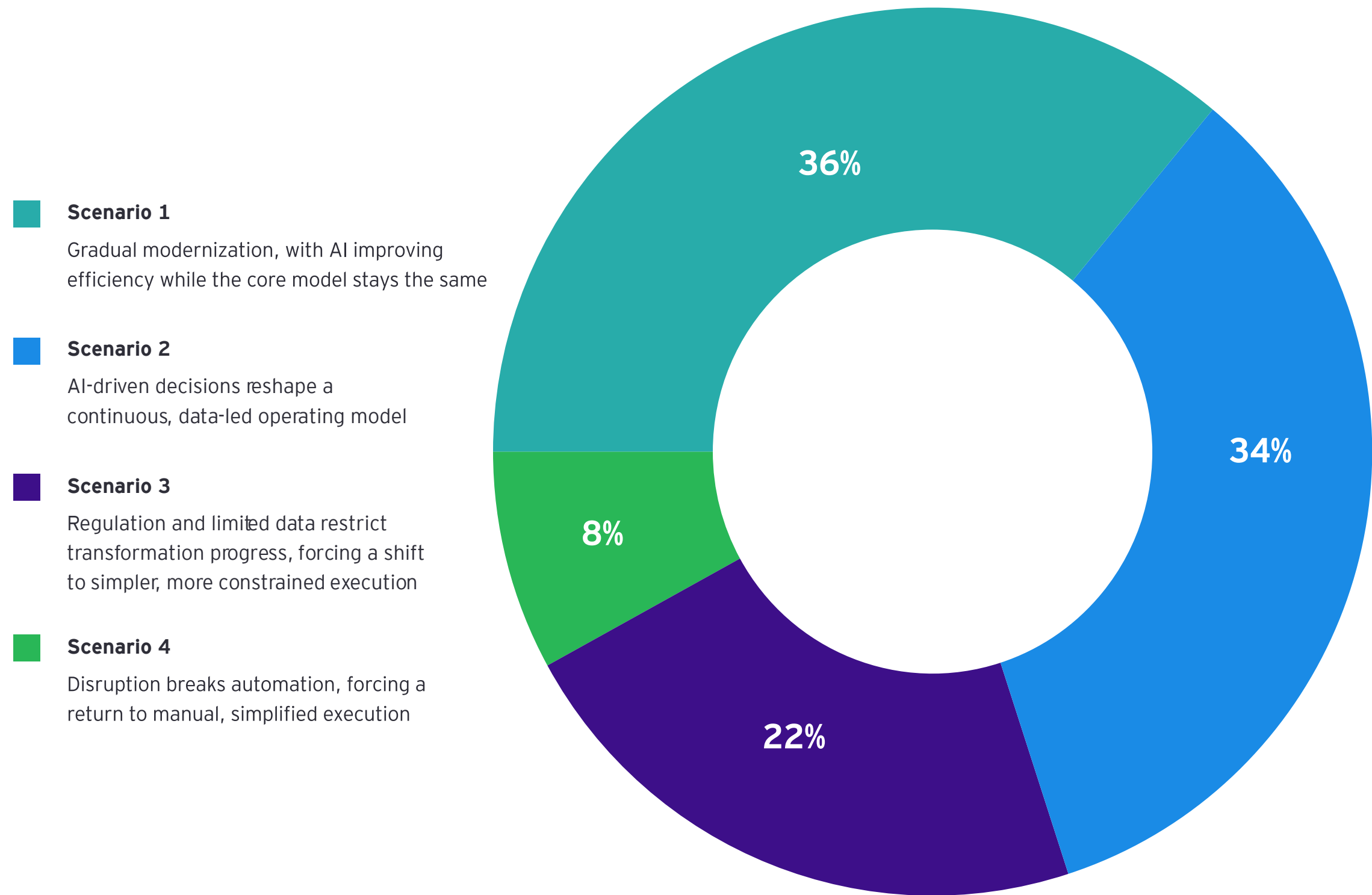
This lack of alignment matters. Leaders cannot wait for certainty on how quickly retailer platforms, algorithmic discovery and agent-led commerce will reshape demand, nor can they prepare for only one outcome.

The choices being made now on where media is placed, how trade investment is governed, who owns consumer and customer data, and how closely sales and marketing decisions are connected will determine how well the business performs across very different futures.

Some choices preserve influence and flexibility across scenarios. Others deepen dependence on retailer-controlled signals, fragmented budgets and function-led execution. The task is to act in the absence of certainty, without becoming locked into a model that the market is already outgrowing.

Sales and marketing leaders are confident about the future

Which of the following future scenarios do you consider most realistic for your industry based on the current trajectory?



Source: EY Consumer Products Dynamics Research 2026

SECTION FOUR

Companies are not moving at different speeds so much as managing competing priorities at the same time.

All are balancing three pressures: defending performance in the short term, adapting to structural shifts in demand and industry conditions, and redesigning how their commercial model works.

Some focus more heavily on improving performance within the current model, refining pricing, promotion, media and portfolio decisions to deliver immediate gains. Others are working to connect capabilities and processes across functions, linking data and decision-making more closely across the commercial model.

A smaller group is going further – redesigning governance, incentives and decision infrastructure so that decisions are made and managed as part of a single system. Most organizations are doing elements of all three at once, but with very different levels of emphasis.

The challenge is that these priorities do not pull in the same direction. Defending the P&L reinforces short-term optimization and existing structures. Adapting the model reshapes where and how companies grow, but largely within those structures. Redesigning the system requires breaking them, changing how decisions are made, connected and governed.

In practice, organizations are pulled toward the first two. This imbalance is reflected in transformation priorities: companies are concentrating on IT, data and digital (37%) and operations (29%), while areas critical to how decisions are made and connected are among the least prepared. For example, only 17% are prioritizing people and change.

This is the Optimization Trap and Decision Gap in practice.

This is a pivotal moment. Improving performance within the current model can buy time and strengthen execution. But advantage will increasingly come from alignment, from connecting decisions across functions and turning insight into coordinated action.

AI is accelerating change in how products are discovered, compared and chosen, but the real challenge lies in how organizations make commercial decisions in response. The question is not whether these shifts will reshape the industry, but how quickly companies adapt the systems that guide those decisions.

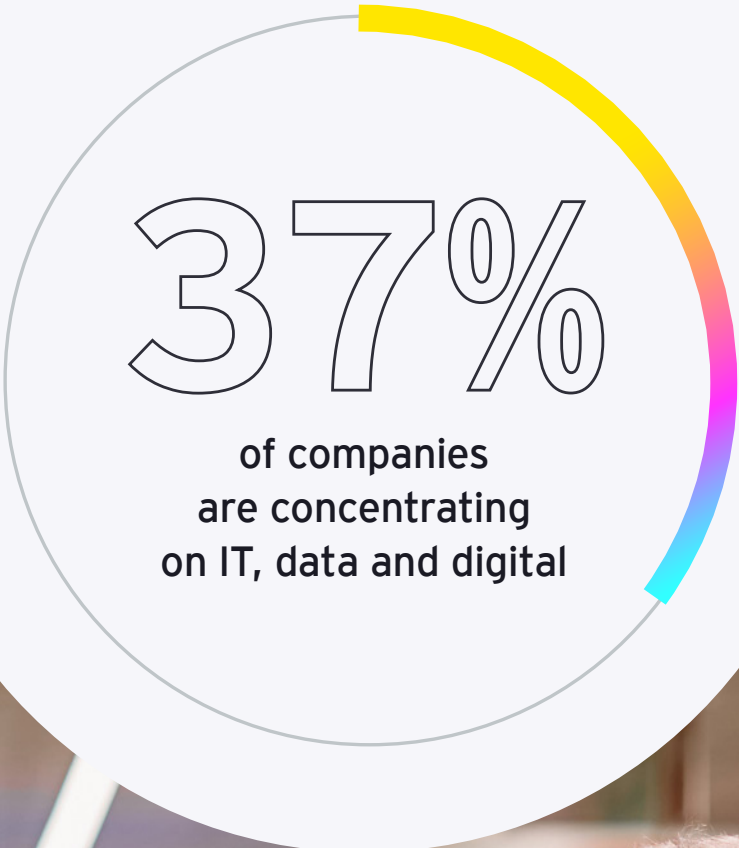
For some companies, focusing on optimization within the current model may be the right choice in the near term. Where markets are stable, routes to market are simple, or the cost of integration outweighs the immediate benefit, incremental improvement can be both rational and effective. But that choice should be explicit.

The real risk is not failing to anticipate the future, but remaining too long in a model the market is steadily outgrowing. As one executive said: “Holding on to old constructs will be the death of your function.”

Companies that succeed will understand how these tensions play out in their own organization, make deliberate choices about where to focus, and ensure that the decisions they take now are consistent with the commercial model they will ultimately need to operate.

Some argue that this will diminish the role of brands and the companies behind them. We take a different view. Brands will continue to matter – but how they are built, activated and sustained will change.

Those that strengthen how decisions connect across their commercial system and align today’s choices with the system they will need to operate will be better placed to navigate that shift. In a market shaped by intelligent platforms and decision engines, advantage will come not from having more tools, but from how well decisions are connected.



Ecosystems clarity: what to own, what to partner

Jens Weng, EY-Parthenon Global Consumer and Health Leader
Michael Wharfe, EY-Parthenon UK&I Head of Consumer

The companies that benefit most from ecosystems are not those that partner most, but those that are clear about what they are building themselves – and why. The question is where to draw the line.

First, define what must remain yours. This isn't about size or cost; it's about where value is created. For many, that includes consumer understanding, pricing decisions and the ability to connect commercial levers. If those capabilities sit outside the organization, you can lose control of how value is generated.

Second, partner deliberately around everything else. External partners can accelerate capability, but only if they are anchored to clear roles and decision rights. Without that, complexity increases and accountability weakens.

Third, protect access to data. Several organizations have already lost direct visibility of their consumers, relying on retailers or platforms for insight. Rebuilding that access – through direct channels or better data agreements – is critical.

The global EY organization is helping Consumer Products companies define these boundaries – identifying the capabilities that need to be owned, structuring partnerships around them, and facilitating data and decision rights stay aligned to value creation.



Commercial talent: from execution to judgment

Sarah Gibbon, CP Business Consulting Partner
Matthew Kearney, EY UK&I Consumer and Health Consulting Leader

The talent model for sales and marketing is usually built around large teams focused on execution. That's giving way to approaches that rely on fewer, more senior individuals, supported by AI.

This is less about removing roles such as sales reps, and more about changing what they do. The emphasis moves away from task execution towards relationship management, influence and decision-making.

That opens a bigger question: can existing talent be developed into these roles, or are different profiles needed? Many organizations still treat this as a reskilling exercise. In practice, it is a redefinition of roles and accountability.

With fewer purely junior roles and greater weight in mid-to-senior positions, the shape of the organization changes. Work is also moving away from functional silos toward teams organized around business problems, with leadership focused on setting direction and removing friction rather than directing tasks.

Organizations need to define the roles they are building towards, assess how far current teams can stretch into them, and make deliberate choices about where to develop, redeploy or bring in new capabilities. EY is working with Consumer Products companies to define these roles and align talent, structure and accountability around them.

Twenty-two percent of sales executives and 31% of marketing executives identified talent and skills gaps in critical areas (e.g., digital, analytics, product, change) as a barrier to transformation.





Eight implications

for leaders

You're likely less advanced than you think

Question:

- Are you improving the current model, or redesigning it?

Most CP organizations are still optimizing within existing operating models, even as they invest in AI and data.

Action:

- Identify three to five core commercial decisions (pricing, promotion, media, assortment) and test whether they are made once and executed consistently, or reworked across functions. If they are reworked, you are still in the Optimization Trap.

“If you overlay AI but continue to run the same processes ... you're not transforming anything.”

FOOD CHIEF OPERATING OFFICER

More value sits between functions than within them

Question:

- Where are you still losing value at the hand-offs?

Sales, marketing and supply chain are still managed as separate engines, even as value increasingly depends on how decisions connect across them.

Action:

- Define a small number of cross-functional decisions that matter most for growth, and assign shared ownership, KPIs and governance so they are made once and carried through without rework.

“Every choice made in sales has an operations consequence.”

FOOD CHIEF INFORMATION OFFICER

The constraint is decision-making, not insight

Question:

- Which decisions need to move faster, and what is slowing them down?

Most organizations have more insight than they can act on, but decision processes and governance have not kept pace.

Action:

- Identify the decisions that drive growth and measure the time from insight to action. Simplify governance, clarify decision rights and ensure data is available at the point of decision to reduce that cycle time.

“

The biggest challenge isn't insight. It's getting from insight to a decision the organization can act on.

FOOD CHIEF MARKETING OFFICER

AI is an inflection point

Question:

- Where are decision rights unclear, contested or misaligned?

AI increases the speed and scale of decisions, but without changes to governance and accountability, its impact will be limited.

Action:

- Define which decisions should be automated, which remain human-led and how accountability is maintained. Align incentives and decision rights to reflect how AI will be used in practice.

“

AI will either disqualify you if you don't act, or become a real competitive advantage if you act well.

CP CHIEF CUSTOMER OFFICER

Influence is shifting upstream

Question:

- Where is influence moving in your categories, and are you present there?

A growing share of demand is shaped before the point of search or purchase, within retailer platforms, algorithms and agents.

Action:

- Map where demand is being shaped in your categories and prioritize investment in the capabilities that influence those environments, including product data, pricing consistency, availability and platform visibility.

“

Retailer agents are starting to sit between the brand and the consumer. That shifts control of how brands show up and raises the question of how retailers will monetize that influence.

HPC CHIEF CUSTOMER OFFICER

Integration is the real source of differentiation

Question:

- Where are you truly differentiating, and where are you just keeping up?

Efficiency gains will be widely available. Advantage will come from how well commercial decisions are connected and aligned.

Action:

- Integrate trade, media and pricing into a single commercial investment model with shared metrics and a common view of ROI, so these levers are planned and optimized together.

“

On efficiency, I just need to be as good as everyone else. The difference will come from how creatively we use it.

HPC HEAD OF COMMERCIAL

7 Roles will shift from execution to judgment and orchestration

Question:

- Which roles need to evolve now, not later?

As decisions become more connected and AI-supported, the value of execution declines and the value of judgment and coordination increases.

Action:

- Redefine core sales and marketing roles around decision-making and orchestration. Identify where capabilities need to shift, and reorganize teams around business problems rather than functions.

“Marketing done well is a craft. What technology doesn’t have is judgment, and good leadership is based on judgment, not just speed.”

IAN MASKELL

former VP Global Marketing,
Unilever and Mars

8 Some decisions can’t be deferred

Question:

- Which decisions are you postponing that will define how your model works?

Key questions around governance, automation and data ownership will shape the commercial model, whether they are addressed deliberately or not.

Action:

- Prioritize and resolve the decisions that define how your commercial model operates, including ownership of data, decision rights and automation. Make these choices explicit rather than allowing them to evolve informally.

“We don’t yet know which decisions should remain human and which should be automated.”

HPC CEO

METHODOLOGY

This report is based on a combination of primary research, executive interviews and secondary analysis, designed to provide a detailed, global view of how sales and marketing is evolving in Consumer Products. This combination of large-scale quantitative research and executive interviews underpins the perspectives and recommendations in this report.

Primary research

EY Consumer Products Dynamics Research 2026

All references to the EY Consumer Products Dynamics Research relate to an online survey conducted by Oxford Economics between 28 January and 18 February 2026. The survey captured responses from more than 850 senior executives across consumer products companies globally.

Respondents were selected based on their involvement in, or responsibility for, strategy and performance across sales, marketing and end-to-end supply chain, and answered in relation to the function they were best placed to represent.

The research examined how companies are approaching transformation, including strategic priorities, barriers to execution and maturity across key capabilities.

The sample spans 24 markets across the Americas, Europe, Asia-Pacific and the Middle East, with quotas applied to ensure balanced representation across geography, revenue, sub-sector and function. Companies ranged in size from US\$250m to over US\$20b in revenue, covering food, beverages, household and personal care, and tobacco.

Executive interviews

The survey findings were complemented by more than 20 interviews with Consumer Products C-suite executives and industry analysts, providing deeper insight into emerging challenges, decision-making dynamics and leading practices.

Additional interviews were conducted with EY leaders across supply chain, M&A, commercial excellence and digital transformation to further test and refine the perspectives presented.

Additional datasets

Insights were further enriched through:

- The EY AI Sentiment Index, based on a global survey of 18,152 individuals across 23 markets, examining how people use and perceive artificial intelligence

Secondary research

The analysis is supported by extensive secondary research using EY tools and external data sources, including Capital IQ, Euromonitor, LSEG and Oxford Economics.

Maturity index

To assess progress, we developed a maturity index to quantify how organizations are evolving across key transformation capabilities.

The index is based on survey responses mapped to nine dimensions: strategic orientation; leadership and governance; operating model integration; talent and capabilities; data foundations; partner and technology ecosystem; marketing transformation; sales transformation; and portfolio and pricing strategy.

Responses were converted into a normalized numerical scale and aggregated to produce both dimension-level and overall maturity scores. Organizations were then classified into five stages:

- 1.0-1.9: Lights on - focus on operational continuity and foundational capabilities
- 2.0-2.9: Incremental optimization - targeted improvements in efficiency and execution
- 3.0-3.4: Coordinated execution - structured alignment across functions
- 3.5-4.2: Synchronize intelligence - integrated, data-driven decision-making
- 4.3-5.0: Self-optimizing ecosystem - AI-enabled, increasingly autonomous operations

These stages reflect a progression from fragmented, reactive operating models to integrated, intelligence-led organizations capable of continuous optimization and adaptation.

A special thank you to our authors and contributors

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Continue the conversation

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