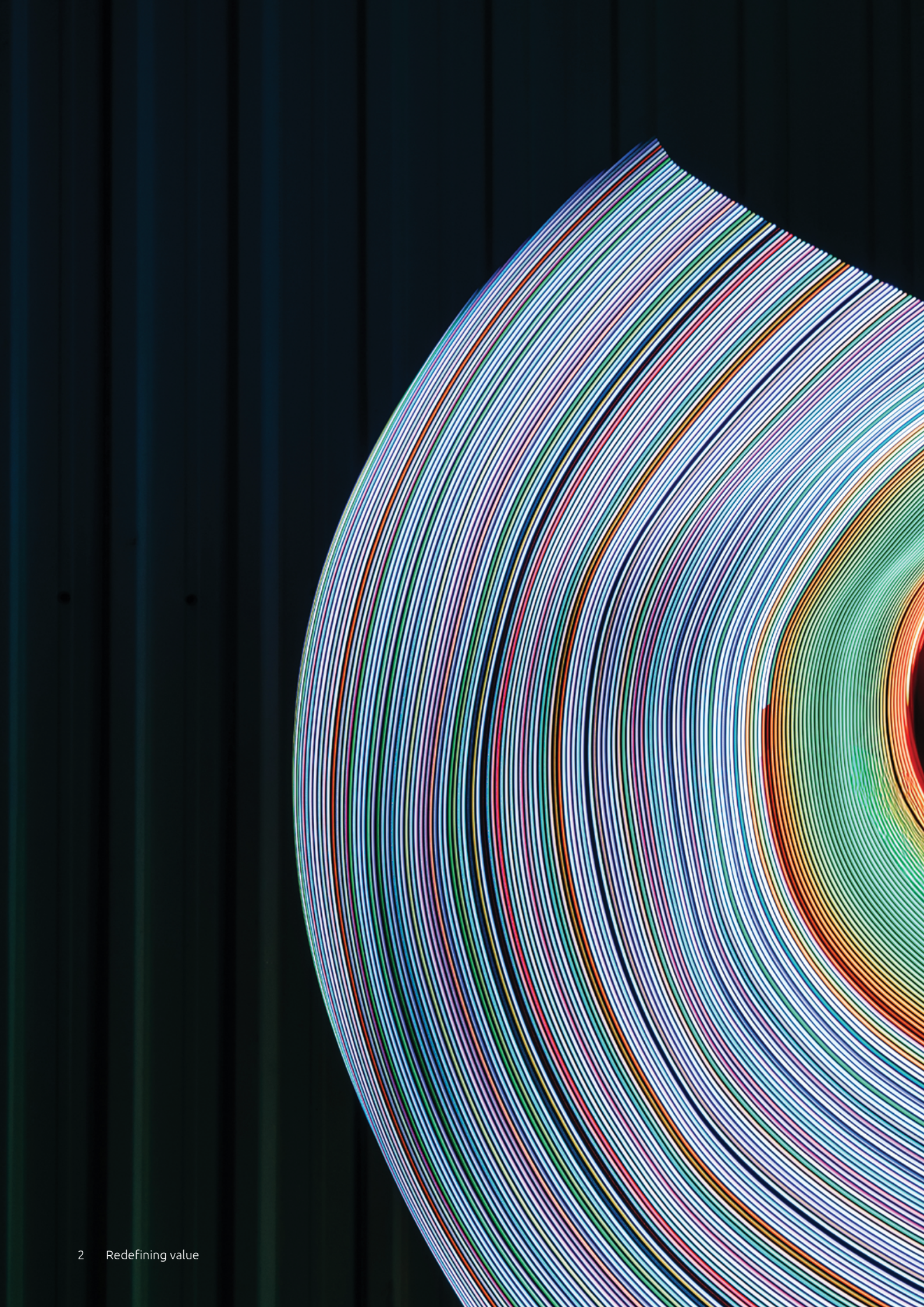


Redefining value

How to win in ***Consumer Products and Retail*** in the Netherlands

| **Make it real.**

Capgemini



Redefining value

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Opening word by Jan Kazen

The rules of value creation are changing. Are you?

In Dutch consumer products and retail, leaders are faced with growing tensions between customer expectations and business realities. Consumers expect lower prices, better experiences, sustainable products, greater transparency and more personalization, often simultaneously. At the same time, businesses face labor shortages, supply-chain volatility, margin pressure and accelerating technological change. The challenge is managing these tensions and redefining value, in a quickly changing world.

A shopper asks an AI assistant what to buy. A store employee gets an immediate answer to a product question. A planning system weighs availability against waste. A brand adjusts its proposition because consumers no longer accept the old definition of quality. These are everyday signals of a bigger shift: value is changing, in the eyes of consumers and in the choices organizations make.

Dutch consumers are changing how they discover products, how they make decisions, and what they expect in return. AI increasingly influences purchase decisions. Trust has become a commercial differentiator. Sustainability is judged through the lens of affordability. Convenience is expected, but not at the expense of control. Consumers embrace technology that helps them, yet still want human judgment when choices become important or complex. Together, these shifts represent a fundamental change: the definition of value itself is evolving. The central question of this report is how organizations can create value that consumers recognize, businesses can sustain, and society can trust.

Value redefined is the quality of the exchange between consumers, companies, employees, partners, and society. That exchange is continuously renegotiated through every product purchased, every service interaction, every operational decision and every use of technology.

Five priority areas

To understand how value is changing, this report examines five dimensions of transformation:

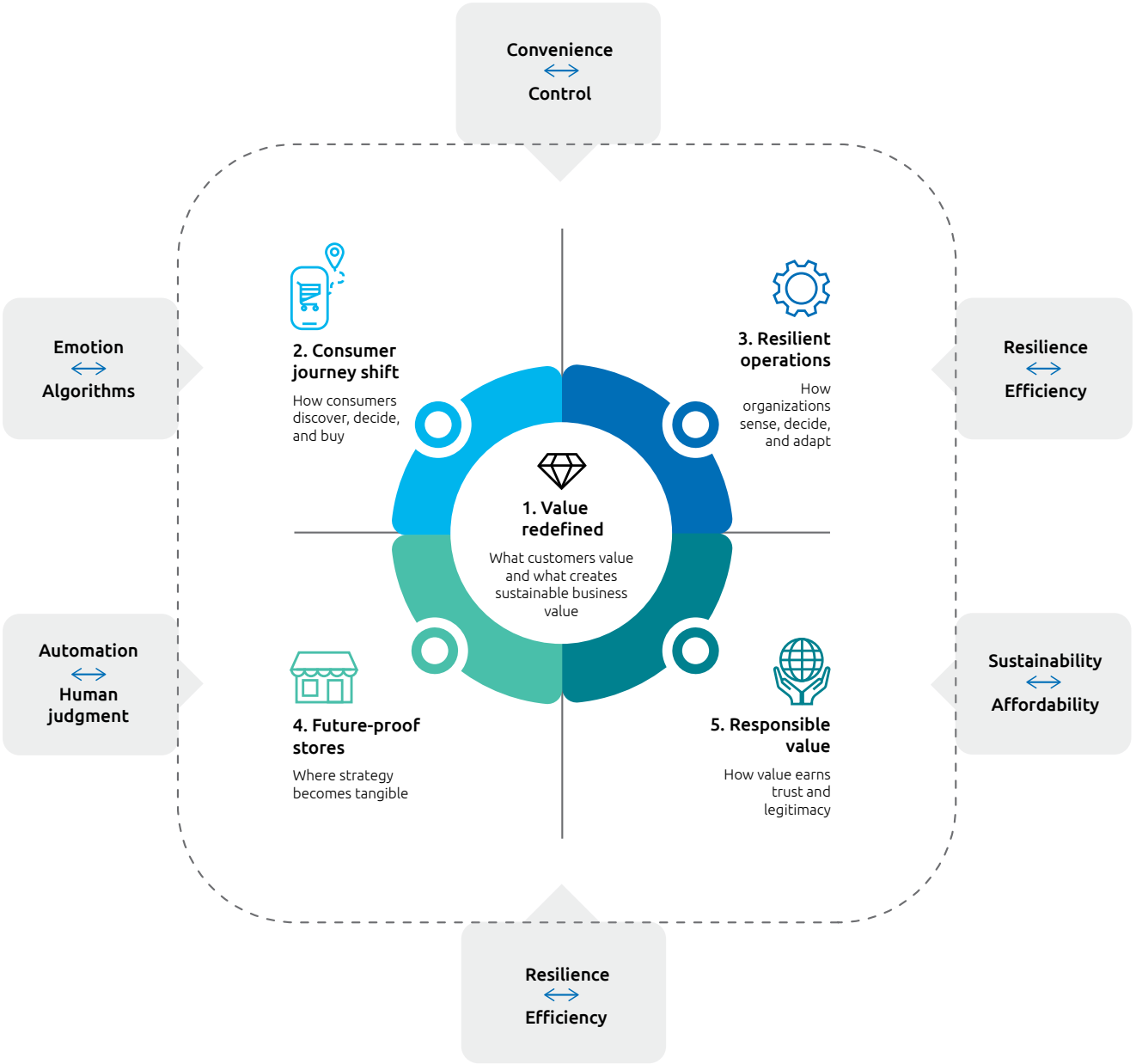
- What consumers value, and what opportunities this brings for companies
- How consumer journeys and purchasing decisions are changing
- How organizations stay resilient, how they sense, decide and adapt
- How stores remain relevant, and make the promise tangible
- How trust is earned and responsible values are maintained

The perspectives of Ton van Veen, Aniruddha Kusurkar, Erick Webbe, Noortje van Genugten and Ruud Limmen connect these themes to the choices leaders face in practice. Capgemini's most talented experts share their views. Together with Dutch consumer insight and practical examples, these voices show that the future will not be shaped by AI, but by the decisions made around it. I am proud of the first annual Value redefined report, co-created with the Dutch Consumer Products and Retail industry.

Make it Real is the practical thread across the report: turning insight into choices, capabilities and outcomes.

Agenda

Five priority areas. One connected story.



The five priority areas define the Consumer Products & Retail agenda.

Six tensions shape the choices

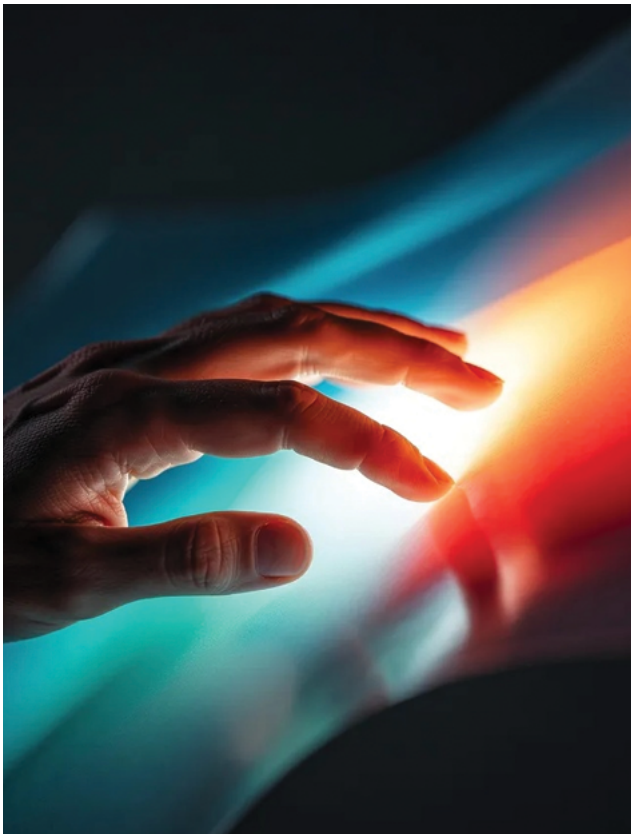
Across the five priority areas, six tensions recur: emotion and algorithms; convenience and control; resilience and efficiency; automation and human judgment; personalization and privacy; sustainability and affordability. The challenge ahead for organizations is to explicitly balance all of these tensions.

Redefining value: every day

The five priority areas lead to one conclusion: value is no longer what a company says it offers. It is the quality of the exchange it sustains, with consumers, employees, partners, and society.

Winning organizations will make that exchange relevant and fair for consumers, economically viable for the business, resilient under pressure, human where it matters and responsible by design. Through clarity and capability, we can keep making better choices as value continues to change, every day.

That is the invitation of Redefining Value: look beyond separate trends and technologies, understand the tensions that connect them, and focus on the choices that make value visible in daily life.





Jan Kazen

Industry Lead Consumer Products & Retail – Capgemini Invent Netherlands

Jan leads Capgemini's consulting services for Consumer Products & Retail in The Netherlands. He has a family tradition in food retail. During his career, Jan successfully realized strategic transformations for retailers in all parts of the world. As vision is useless without realizing it, Jan and his teams usually engage for longer periods of time to make it real.



Interview: Retail veteran Ton van Veen

For Ton van Veen, retail comes down to identity: what a format stands for, and whether it lives up to that promise every day. Ton was CFO of Jumbo from 2004 to 2022, then joined the Supervisory Board, only to find himself back at the heart of the business as CEO, steering Jumbo through turbulent years until he stepped down in 2025. Between 2019 and 2023, he also served on the Supervisory Board of Rituals and between 2021 and 2025, he was member of HEMA's Supervisory board. He currently holds several positions, including membership of the Supervisory Boards of automotive importer and retailer Louwman and online food retailer Crisp. Furthermore, he is (co)owner of premium chocolate retailer Coco & Sebas and online sports retailer PassaSports. We spoke to him about the highs and lows of the past twenty years, the state of the retail sector, and the future.

Trust is built on a promise you keep

Ton was part of Jumbo's journey, from being the 'new kid on the block' to becoming a major player in the Dutch retail landscape. For him, retail's lesson is that you can never sit back.

"Jumbo started in the late 1990s, promising the lowest prices, the widest range and the best service," Ton says. "That led to Jumbo's 'seven pledges' covering price, availability, freshness, service and 'satisfaction guaranteed or your money back'. Everyone said it could not be done, but this is what made Jumbo big."

Jumbo sustained that approach for years: every day low prices and every day low costs. It worked because of the smooth flow of goods, without hiccups through promotions, and the high turnover. But no formula protects you indefinitely. "After years of success, markets change and competitive differentiation is narrowing. You start to broaden your scope, may lose your focus and show signs of wear," Ton says. "Then you have to reinvent yourself. That is what is happening now."

AI is a hype, but a game changer, too

Our research shows that more consumers use AI and expect retailers to offer AI-powered solutions, yet many still want the face-to-face contact of a real shop floor. Ton: "AI is heavily hyped, but it's more than that. It is a structural game changer, just like the Industrial Revolution and Digitalization were. There is a great deal of fear and panic, entire business models are supposedly going to be swept away. I do not think that will happen overnight, but you do need to be able to adapt. I mainly see AI as an opportunity to redefine your added value in the areas where AI does not have the answer, while leveraging AI to the max."

In practice, this means that AI can take care of content creation, predicting customer behavior, analyses, and offering convenience through agentic AI. "More and more customers are letting AI compile their shopping lists. The customer's role in their own journey will change."

Ton thinks this is especially true in non-food. AI will also change the customer journey in food and act as an enabler, but eating will always remain an analog, sensory, emotional experience. "It is one of our most intimate moments. You keep that to yourself. AI should not be too conspicuous there."

Sustainability: a priority in search of a business model

Sustainability has topped the agenda for years, yet repeatedly proves hard to turn into a compelling commercial proposition. Ton concurs: "Within the Food Industry, we often discuss sustainability. Dutch executives in particular have a genuine sense of responsibility. They want to leave the world a little better than they found it. They are not doing it for show. But what do you do when private equity is behind you, or when you are publicly listed? Then you have to perform better every quarter. So who is going to pay? Talking about sustainability is one thing; acting on it is another, as long as it does not produce a viable long-term business model."

Still, it can be done, as companies such as Crisp prove. "I joined Crisp's Supervisory Board. They have reached a target group with a locally sourced, fresh, sustainable and more expensive range, aimed at conscious consumers who make deliberate choices and are willing to pay more for better food."

A boutique approach such as this can be hard to scale successfully for big brands. But this doesn't mean there's nothing they can do, Ton argues: "It would already be a major step if the big brands shortened their supply chains and organized them within Europe rather than on the other side of the world. That alone would make their ranges considerably more sustainable, and their supply chains more resilient. But reaching agreements at an international level still proves very difficult."

Resilience is a design choice

Wars, climate change and digital threats place heavy demands on companies' resilience and flexibility. Both, Ton argues, must be engineered. "It is about striking a balance: do you design your supply chain solely for the lowest possible cost, or do you build in enough resilience to absorb crises? You have to approach this systematically: where do we want zero risk tolerance, where do we allow a little more and where can we loosen the reins? That is how you make your business more robust. Think of shorter supply chains to safeguard continuity. Given the geopolitical climate, we should build greater self-sufficiency on our own continent to secure future food supplies."

For the remaining part, resilience is about choosing the right people. “You need a team in which every role is properly covered and there is plenty of diversity. Not just in expertise, but in character. You need a fixer, someone who thinks in structures, someone who brings creativity and someone with really good people skills. This is how you build a high-performing team that can deal with any crisis. And you have to practice everything: recovery, reputation management, how you present yourself to the outside world. All of this was very helpful during my time as CEO of Jumbo, when I was essentially a crisis manager.”

Identity, lived every day

Two decades in retail has taught Ton two things. First, create a clear identity that consumers recognize, appreciate and trust. Second, live up to that identity and promise every day, every moment, at every occasion, at every store and touchpoint, for every customer. “Relentlessly,” he says, “and with passion.”



Ton van Veen

Jumbo’s former CEO





Chapter 1

Value Redefined

1.1 – Introduction



What consumers really value — and what this demands from retailers and brands.

Do consumers only care about price and quality? Or do they also care about service and experience? Or about easy access to everyday solutions, for example to live healthier lives? Does trust matter just as much? What happens when a discount challenger, a social platform, or an AI assistant offers something faster, cheaper, or smarter? What does loyalty mean when switching takes one click?

These are not rhetorical questions. Dutch consumers answer them every day, with their choices to buy or not to buy, to come back or not, to be your advocate or not. The answers are reshaping what value means in measurable ways: not as a marketing concept, but as something genuinely changing in the market, for consumers, retailers, and brands at the same time. We see a new value exchange dynamic in the reciprocal relationship between consumers and the companies that serve them. This value exchange is renegotiated continuously, with every purchase, every price decision, every service interaction.

What Dutch consumers are telling us

Fairness influences the willingness to pay

Our recent research report What Matters to Today's Consumers shows that price still matters, and more for Dutch consumers than in most surrounding countries. But fairness matters just as much. 84% would switch brands for a lower regular price; almost as many would leave a brand that quietly reduces pack size or quality. The trigger is rarely the price change itself. It is the deception behind it.

The flip side is equally clear: honest communication builds real loyalty. 90% find volume discounts fair. 54% accept demand-based pricing; nearly double the global average, when the logic is explained. Fairness is not a fixed price point. It is a perceived relationship.



The dual consumer: cost-conscious and indulgent at the same time

Dutch shoppers economize and indulge simultaneously. Many buy cheaper product types or smaller pack sizes, yet only 22% have switched to private-label brands in response to price-increases over the past year, roughly half the global rate. They cut costs on what they buy, not in whose products they trust. Seven in ten say small treats help them manage financial pressure. Brands that address only one end of this, cheap or premium, miss the full picture.

AI: useful, but only on consumers' terms

One in three Dutch consumers (above the global average) already uses AI-powered shopping tools, and 45% have bought via social platforms. But 87% insist on clear limits to what AI can do autonomously. They embrace technology that helps; they resist technology that takes over. Over 70% still want human contact when decisions are complex or something goes wrong. Digital convenience and human connection are both expected, not alternatives.

For a detailed discussion on the Dutch perspective of the What Matters to Today's Consumer report, see the accompanying article and infographics.



[1]Capgemini Research Institute, 'What Matters to Today's Consumer 2026' (oktober 2025, N=12.000 / NL sub-sample).

What this means for retailers and brands

Fairness as additional attribute for consumer relevancy

Retailers and brands have long competed on five dimensions: price, product, service, access, and experience, and the strategy was about choosing where to lead and differentiate and where to simply meet the standard. Our research adds a sixth: fairness. Trust, transparency and honesty are disqualifiers when absent and will drive loyalty when present.

Together, these six define consumer relevancy: the degree to which a brand genuinely matters in someone's daily life. The strategic question shifts from 'how do we sell more?' to 'in which moments do we matter, and why would consumers care?'.

Identity is what makes the value exchange sustainable

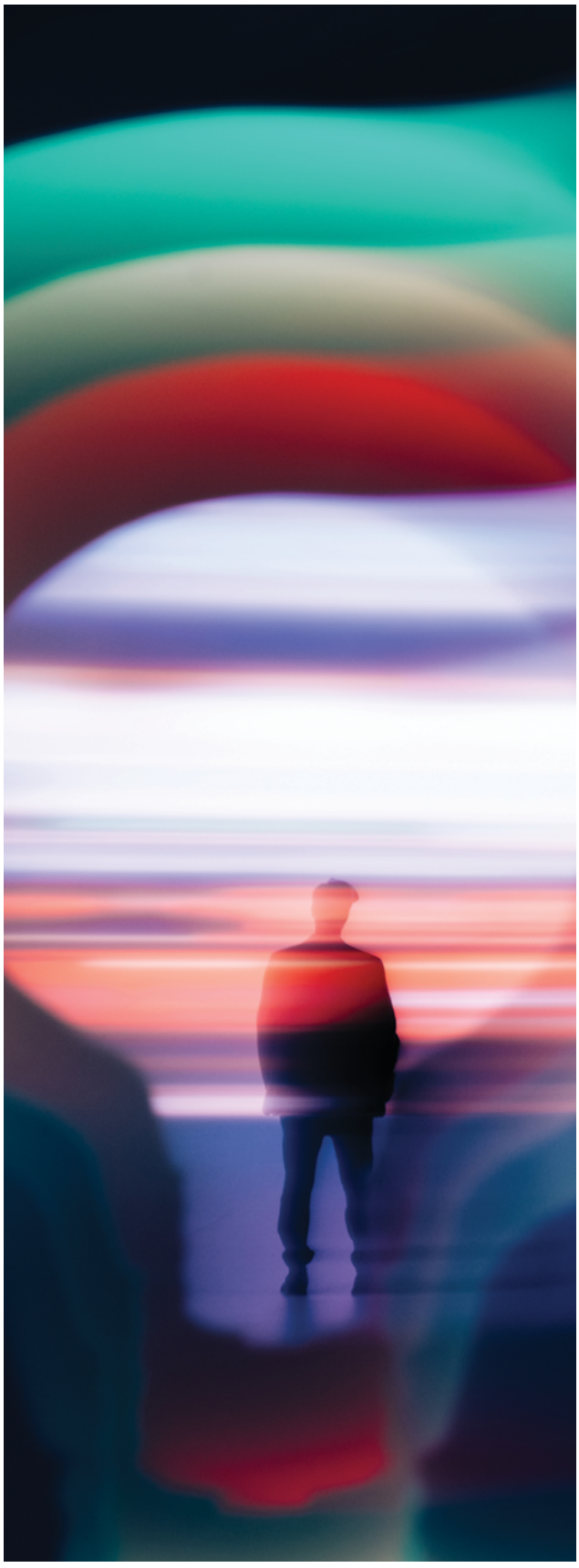
HEMA is the clearest Dutch proof point. After overexpansion and near-collapse, the turnaround was built on restored identity; sharper assortment, stronger design, a reinvented store experience, but not lower prices. 'It's a race to add value, not a race to the bottom.' That clarity turned near-bankruptcy into structural profit.

Optimel tells a complementary story. This brand, anchored to '0% fat', was a single-dimension proposition – but the market had moved on. By evolving into a broader health platform, including notions about protein, probiotics and gut health, Optimel rebuilt relevance with a broader audience and earned greater willingness to pay. When a brand genuinely improves daily life, price becomes secondary.

"Affordability cannot come at the expense of efficacy. Consumers expect both, they scrutinize ingredients, compare products, and demand transparency. Today's definition of value means delivering quality and trust at every price point."

Edwin Taborda

Global Chief Consumer & Market Intelligence Officer, L'Oréal Consumer Products Division



Revenue Growth Management: start from what consumers value

The commercial implications go beyond brand positioning. Revenue Growth Management, the discipline covering pricing, promotions, pack architecture, assortment, and innovation, is being rethought from the ground up. The shift takes place at the starting point: from financial modeling to consumer value modeling. What do consumers genuinely value? Which attributes drive their choices? What will they actually pay for? Those answers must come first. Commercial decisions follow from them.

This matters because every lever is connected. A price change affects promotion response; a pack size affects perceived value; an assortment choice affects brand image. Optimizing one lever in isolation produces fragmented results. Companies that think across all levers simultaneously - creating value for consumers, growth for categories, and sustainable margins for brands and retailers - turn the value exchange into a commercial advantage.

Making the value exchange real

Defining what consumers value is the starting point. Delivering it consistently requires transformation across the full operating model. In this report, we present an end-to-end discussion of this challenge: we discuss how the consumer journey is shifting toward agentic, AI-driven commerce, and what that means for how brands are found and chosen (chapter 2); how agility and resilience become the backbone of staying relevant as expectations shift (chapter 3); how physical stores need to evolve from transaction points into valuable destinations (chapter 4); and how responsible values and sustainable behaviors demand critical attention (chapter 5).

The value exchange is the why. The chapters ahead are the how.



Kees Jacobs

Vice President Consumer Products – Capgemini Invent Netherlands

Kees is overall industry thought leader within the Global Sector for Consumer Products and Retail at Capgemini and bears specific responsibility for the Consumer Products market for Capgemini Invent in The Netherlands.





1.2 Interview

Ani Kusurkar (FrieslandCampina): The evolution of value

For Ani Kusurkar, who leads FrieslandCampina's consumer business in the Benelux, the story of modern retail is a story of consumers becoming sharper, more thoughtful, and more attuned to what truly matters. In his view, shoppers are making smart choices. And the companies that thrive will be the ones that embrace that intelligence.

Price matters, but trust matters more

Ani has seen firsthand how quickly trust can erode when companies try to be clever for the sake of their bottom line. 'Shrinkflation', for example, is one of the clearest ways to lose consumers. "You're not taking your customers seriously if you pull stunts like this," he says. "Consumers may not remember the exact price of milk, but they know when something feels off. And they know when they're being swindled."

Our research confirms this. It shows that 64% of Dutch consumers see shrinkflation as unfair, and 71% would switch brands if content or quality drops without transparency. Ani sees this play out in real time. When inflation hits, the instinct inside large organizations is often to protect margins quietly. But consumers aren't fooled. They may not track every cent, but they absolutely track fairness.

Ani's alternative is simple: be transparent. If a pack gets smaller, say so. If a price needs to rise, explain why. "Consumers make smart choices," he says. And he doesn't accept the notion that consumers only care about pricing: "They're willing to pay more when they see the benefits of doing so."

His example is organic milk. When FrieslandCampina saw pressure on its fresh milk volumes, the assumption was that private label was gaining. But the data told a different story: 60–70% of the loss was actually the result of the rising popularity of organic milk. Consumers weren't trading down; they were trading up, because the perceived value was higher and the premium acceptable. It's the dual consumer in action. Saving and splurging in the same basket.

The evolution of value

It's an example of consumers' sophisticated and constantly evolving views on value. Ani mentions Optimel: once a lifestyle brand built on "low fat, low sugar," it declined for a decade as consumer definitions of health shifted. Today, health is about the presence of good things, not just the absence of bad things. Optimel as a brand just didn't fit the bill anymore.

FrieslandCampina rebuilt Optimel around those new expectations. Two new focal points emerged: protein and gut health. "We simply followed the trend from a consumer point of view," Ani says. And consumers responded. Volumes are rising, penetration is rising. And, crucially: many of the new buyers are coming from private label.

The same story applies to Campina. Ani's philosophy is blunt: if you want to be the number one Dutch dairy brand, your products must be the best. 'Vla' must be the best 'vla'. Greek yogurt must be the best Greek yogurt. "We sometimes forget that people buy us because the product is tasty and nutritious," he says. "It has to be the best." It's this product first mindset that has added 10% sales volume in the Benelux, in just a few years. All in all, companies must take care to track consumers' constantly evolving needs and wants, while staying true to their own core values and strengths.

AI helps, but it doesn't replace

Ani is pragmatic about AI, technology should not replace human judgment. He doesn't see it radically reshaping consumer behavior in low involvement categories anytime soon. "If you're buying a car or an iPhone, maybe. But for milk? I'm not so sure."

Where he does see impact is inside the organization. AI is already transforming internal processes, customer support, sales support, and decision making. Large teams that once handled repetitive tasks can now be automated, freeing people to focus on higher value work. AI helps FrieslandCampina sense change earlier, react faster, and operate more efficiently.

But Ani is clear: technology should not replace human judgment. It should protect and enhance it. The future is not a black box that takes over. It's a system that removes complexity and adds clarity, so people can make better decisions.

Resilience is the new efficiency

Ani's description of the last few years is simple: "It felt like we were jumping from one crisis to the next." Cocoa prices spiking, then collapsing. Energy markets swinging with geopolitical tensions. Hedging strategies that looked smart one month and painful the next. The result is a business environment where long term planning is harder, risk appetite is lower, and agility is essential. "If you can predict your year correctly, you've done a very good job," he says.

This volatility also affects collaboration with retailers. Everyone wants to innovate and invest in sustainability, but negotiations become tougher when the macro environment is unstable. Ani expects consolidation in Dutch retail as a result. With fewer chains, larger players, and more pressure on suppliers to differentiate.

A deeply human story

Ani's view aligns closely with what we heard from Albert Heijn and HEMA: technology matters, but people matter more. Physical stores will remain central. Human connection will remain central. And companies must avoid the trap of investing in tech at the expense of product quality, transparency, and trust.

Ani's advice: focus on value. Real value. Not the value you define internally, but the value consumers actually see, feel, and pay for. Build trust through transparency. Innovate only when you can democratize the trend. And stay agile, because the world will not stabilize anytime soon. "Consumers make smart choices," Ani says. "If you respect and reward that, you'll win."









Aniruddha (Ani) Kusurkar

former Managing Director of FrieslandCampina Benelux

Ani joined FrieslandCampina in January 2017 as the Head of Corporate Strategy, responsible for Corporate Strategy, Digital agenda and leading Fast Forward (biggest transformation program since the merger). In January 2018, Ani joined the Management Team of the new Business Group Consumer Dairy, leading the Commercial function for Consumer Dairy business globally. He was Managing Director of Consumer Dairy in Netherlands from 2023 to September 2026.



1.3 Insights

What matters to today's Dutch consumers - 2026

This section forms part of Capgemini Research Institute's What Matters to Today's Consumers 2026 research. While the broader study surveyed 12,000 consumers across 12 countries in North America, Europe, and Asia-Pacific, the insights presented here focus exclusively on the Netherlands, based on responses from 1,000 Dutch consumers.

The findings provide a focused view of how Dutch consumers are redefining value. Ongoing cost pressures continue to influence spending decisions, while expectations around fairness and transparency are rising. At the same time, AI-enabled shopping experiences are becoming more common, and meaningful human interaction remains important at key moments in the customer journey. Dutch consumers are becoming more intentional in how they spend, what they trust, and what they expect from brands and retailers.

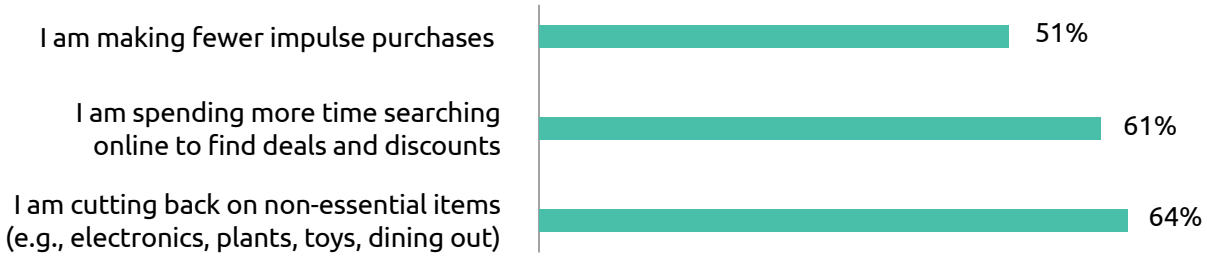
The graphs in this section illustrate how Dutch consumers are redefining value, and how AI, trust, pricing, and human connection continue to shape consumer decision-making across the consumer products and retail landscape. A QR code to the full What Matters to Today's Consumers 2026 report can be found at the end of this section.

Value redefined: where fairness and quality intersect

Inflation fatigue fuels the quest for fair value

Most consumers continue to look for best deals or cut back on non-essential items

% of respondents who agree with the following statements



Source: Capgemini Research Institute, What matters to today's consumer 2026, Dutch sample (N = 1,000)

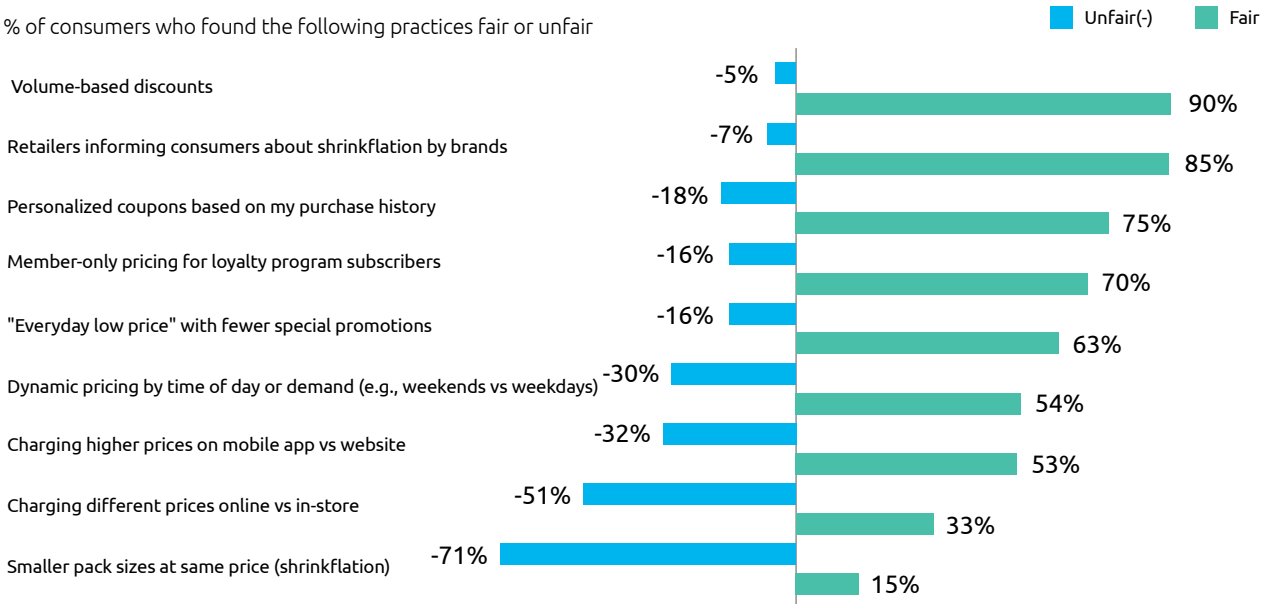
Lower prices and reduced pack size/quality without clear notice emerge as top drivers for switching brands



Source: Capgemini Research Institute, What matters to today's consumer 2026, Dutch sample (N = 1,000)

Fair pricing builds brand credibility

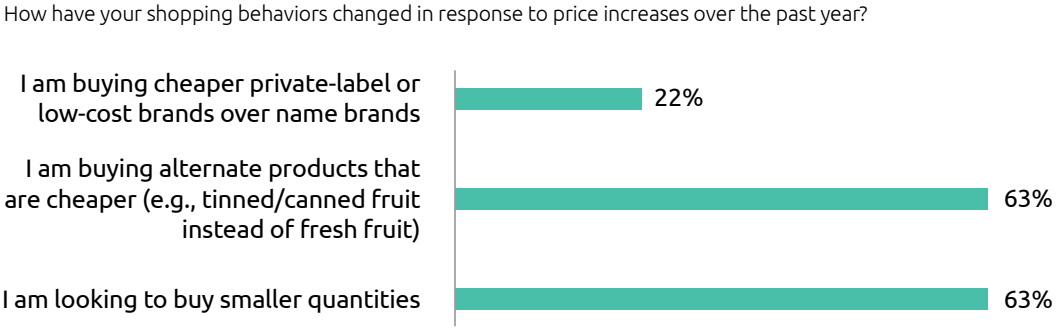
71% of Dutch consumers consider shrinkflation an unfair practice



Source: Capgemini Research Institute, What matters to today's consumer 2026, Dutch sample (N = 1,000)

Strategic saving

Around two in five consumers are opting for cheaper options over name brands to deal with cost of living



Source: Capgemini Research Institute, What matters to today's consumer 2026, Dutch sample (N = 1,000)

Selective splurging

Over four in five consumers avoid private labels for performance-critical products

% of consumers agreeing that they exhibit the below behaviors



Source: Capgemini Research Institute, What matters to today's consumer 2026, Dutch sample (N = 1,000)

Indulgence is the new emotional buffer

Seven in ten consumers opt for treats and small indulgences to cope with financial stress

To what extent do you believe these statements describe you?

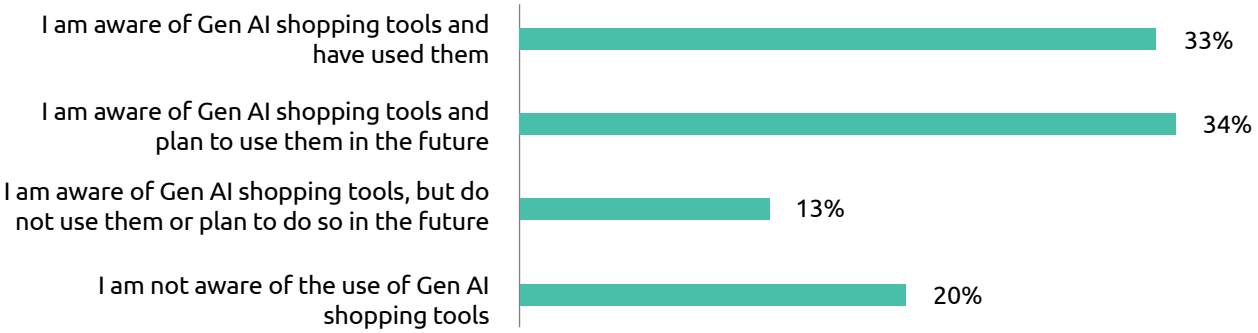


Source: Capgemini Research Institute, What matters to today's consumer 2026, Dutch sample (N = 1,000)

AI — the consumer's trusted guide

One in three consumers has used Gen AI shopping tools in 2025

% of consumers who agree with the following statements



Source: Capgemini Research Institute, What matters to today's consumer 2026, Dutch sample (N = 1,000)

Frictionless tools drive adoption

Most consumers find chatbots useful

% of consumers who mentioned the following



Chatbots for customer queries: conversational chatbot to help in real time with product queries, pricing, and availability.
Personalized post-purchase follow-ups: hyper-personalized post-purchase emails with usage tips, care instructions, and complementary product recommendations.

Source: Capgemini Research Institute, What matters to today's consumer 2026, Dutch sample (N = 1,000)

Trust grows when AI explains itself

79% of consumers are worried about Gen AI data use

% of consumers who agree with the following statements



Source: Capgemini Research Institute, What matters to today's consumer 2026, Dutch sample (N = 1,000)

Human moments matter more than ever

More than seven in ten consumers value human interaction during in-store shopping

% of consumers who said human interaction increases loyalty in the following stages of in-store shopping



Source: Capgemini Research Institute, What matters to today's consumer 2026, Dutch sample (N = 1,000)

Scan to uncover what matters to consumers today



1.4 Point of view

Owen McCabe on the new doctrine of consumer value

For Owen McCabe, Capgemini's Global Commerce lead, the consumer goods industry is still stuck on the idea that consumer value is a static planning assumption. In this interview, he makes a strong case that value is now a live equation, recalculated at the point where shoppers, algorithms, channels and budgets collide.

Owen believes the consumer goods industry is still too often trying to answer a moving question with a fixed model. For decades, he says, consumer value could be defined, researched, priced, promoted and then largely held steady for the life of an annual plan. That assumption is now becoming dangerous. “The value equation has not disappeared,” he argues. “But it has become more unstable, more contextual and more computational. It is being reweighted continuously, at the point where a shopper’s need meets an algorithm, a constraint, a channel, a moment and a budget.”

The starting point for Owen is a challenge to the industry’s reliance on price as the neatest expression of value. “Price is measurable,” he says. “It fits into elasticity curves, margin waterfalls and promotional calendars. But the fact that it is the easiest variable to model does not make it the variable that matters most.” In his view, price disciplines a choice; it rarely creates it. A shopper does not wake up wanting to spend €4.50 on fabric conditioner or €5.75 on a cappuccino. They want clothes that feel cared for, a morning reset, a meal everyone will eat, a stain removed before school, a shortcut to feeling in control.

He is equally careful to separate value from affordability. “A shopper may believe a premium product is worth its price and still walk past it because the household budget says no,” he explains. “That is not necessarily a value problem. It may be a budget problem.” Equally, a discount may be cheap and still feel like poor value if it costs too much time, creates too much friction, asks for too much data, or fails to solve the need in the moment. The till receipt records the compromise that survived. It does not always reveal the value the shopper wanted.

Two things have changed the equation forever

The first change is that value has become more contextual. "The old shorthand of benefits divided by price is no longer enough," Owen says. "Perceived value is what a shopper believes they will get, set against everything they feel they must give up." Money is only one sacrifice. Shoppers also spend time, effort, attention, certainty, privacy and trust. That is why convenience can beat a discount, why a premium product can feel justified in one mission and indulgent in another, and why the same household can solve the same category differently three times in the same week.

He offers the "meal for tonight" as a simple example. The same problem may be solved from the freezer on Tuesday, through a convenience store on Thursday, and by a delivery app on Friday. The need is recognizable, but the weighting changes: speed, reliability, inspiration, health, treat, effort, clean-up, group size, weather and mood all move. "The shopper is not irrational," Owen says. "The equation has changed."

The second change is that value has gone live. Digital and AI-powered platforms now sit between the shopper and the shelf: loyalty apps, retail media networks, electronic shelf labels, last-mile delivery platforms, recommendation engines and increasingly agentic commerce interfaces. "These layers do not simply display an offer," he says. "They shape the choice architecture around it. They decide what is visible, what is convenient, what is comparable, what is nudged, and sometimes what is never seen at all."

That, in Owen's view, makes annual planning too slow as the dominant management rhythm. A joint business plan agreed after weeks of negotiation may still be necessary, but it should be treated as an opening position, not a complete answer. When store-level sell-out, weather, availability, competitor activity, media performance and search behavior can all move inside the same week, the value opportunity may appear and disappear before the next governance meeting has even been scheduled.

Decision latency is the hidden tax on value

This is where Owen's diagnosis becomes uncomfortable. Many companies, he suggests, are still solving yesterday's equation with yesterday's operating model. They have more data than ever, but the data is fragmented. They have more meetings than ever, but the decisions are slow. They have sharper analytics, but the cycle from signal to action is still trapped in weekly reporting, monthly performance reviews and quarterly business rhythms. "Decision latency has become a hidden tax on value," he says.

Asked to illustrate the point, he reaches for an ice-cream example. It is Wednesday. The weekend forecast turns warm. Depot orders are accelerating, sell-out data shows sharing packs moving, social chatter points to barbecues, and a premium competitor is promoting single-serves, leaving the family sharing occasion under-defended. "The perfect answer on Monday will explain the uplift," McCabe says. "The valuable answer is the imperfect one that redirects stock, closes distribution gaps, moves media into the right region and frames the pack as 'dessert for the barbecue' before Saturday."

That is what "live" means. Not that shoppers are doing maths in the aisle. Not that structural pricing should twitch every time it rains. But that the commercial system has to sense, recommend and act at something closer to the speed of the market. "The task is not to solve the value equation perfectly," he says. "It is to act on it in time."

From RGM to value management

The implication, Owen argues, is a redefinition of revenue growth management. RGM can no longer be only a specialist function tuning price, pack, promotion and trade terms. It needs to become an agentic-led value-management system: a connected way of sensing demand, interpreting context, choosing levers, acting within guardrails and learning from the outcome across price, promotion, media, portfolio, supply and customer planning.

His call to action is deliberately practical. "The way in is through decisions, not declarations," he says. "Pick the handful of commercial decisions where latency is costing most. Define the signals that matter, the thresholds that trigger action, the levers available, the human owner, the agentic support and the guardrails. Then measure the time from signal to recommendation to action to outcome." For Owen, the companies that win will not be those with the most elegant annual view of value. They will be the ones that spot the value moment, bring an executable answer to the retailer, and act before the opportunity melts away.



Owen McCabe

Vice President at Capgemini, and Global Commerce Lead

Owen helps consumer-facing companies accelerate growth through digital commerce, revenue growth management, data, tech, analytics, and AI. Drawing on considerable consulting and industry leadership experience across Capgemini, Kantar, Nestlé, and Procter & Gamble, he advises global brands on building more agile, consumer-centric commercial capabilities. Owen is a frequent speaker on the future of commerce and is particularly passionate about the role of AI in transforming commercial decision-making and driving profitable growth.







1.5 Make-it-real

Insights-driven growth

Our client, leading a large infant nutrition brand globally, was facing severe headwinds in terms of sales. The brand was declining in key markets and it was unclear what caused the decline exactly and how to turn it around. This was a key challenge.

But that's not all. The brand not only aims to turn the core business around, but also to double in size by 2030. This means finding 400 million euros in terms of growth potential, and identifying the next big bets to invest in. The brand turned to us to help them tackle these challenges. Concentrating on a key market, we set out to gain insight into levers that would help the brand grow again – locally and potentially also globally.

Make it real

With our 10x Growth approach, a repeatable and proven method for CPG brand growth, we focused on finding the key levers that would help the brand turn around fast:

1. From existing sales data analysis, we learned that the decline wasn't caused by the recent price increase. The decline started before this. So, we needed to understand what had happened in the minds of consumers.
2. We studied existing insights and gathered hypotheses within the brand team to learn more about their own assumptions about the decline. We thematically clustered these hypotheses in 'customer segments', 'product value & price', 'competition' and 'channels', and prioritized them in terms of possible impact.
3. In two sprints, we conducted a set of 25 qualitative interviews with GenZ and Millennial parents. Our focus: to find out how they shop in the infant meals category. We kept a broad focus, in order to avoid a biased

and narrow scope of research. It turned out that the existing product portfolio was no longer relevant for the different groups of parent shoppers; their needs and ideas about good infant nutrition had changed. The brand saw itself as positioned on the higher end of the market, but in the minds of consumers it had become a mainstream brand, with benefits that no longer really resonated. As such, the brand's positioning in terms of occasions, pack, price and benefits no longer aligned with the shopping preferences of large groups of parents. And the latest price increase had only accelerated the positioning mismatch.

4. Our research into parents' preferences also taught us how the brand could grow and innovate. We identified 5 big bets for growth opportunities in the short term (improved market positioning, better price pack architecture and more tailored communications), and mid term (two new product innovation opportunities to build an occasion-led portfolio).

What changed

The opportunities we identified provided input for a number of global business strategy workshops. Together with the brand, we translated the outcomes into a local market execution plan, including the necessary commitments to invest in marketing activities. The plan has been successfully rolled out, and the brand is now growing at the pace of the category in this market.

What's next

Our work has been an inspiration for a global turnaround plan. This is now being crafted and waiting for approval. Once greenlit, we will start cross-testing the key market learnings in other key markets. The resulting insights will be used to localize our approach. At that point, the brand can start to turn the business around on a global level.



Misha de Sterke

Misha de Sterke - Vice President Growth Strategy & Corporate Innovation @frog part of Capgemini Invent

Misha has worked for the last decade with startups, investors and large corporations. His key focus is on how to protect, grow and transform the core business and brands of clients. He worked with multiple Fortune 100 companies and their boards in turning around brands, launching new products and looking for the 10x multiplier in terms of value creation. He is a best-selling author of three books about corporate innovation and leadership.

Chapter 2

The Consumer Journey Shift

2.1 – Introduction



How AI is reshaping discovery, choice, loyalty and organizational design

The consumer journey is no longer a fixed sequence designed and controlled by organizations. It is becoming an intelligent, adaptive system in which AI, platforms and ecosystems detect intent, curate options, compress decisions and increasingly act on the consumer's behalf. This creates a defining leadership challenge: how can brands remain deliberately preferred, organize around fluid customer behavior and scale intelligent experiences without losing human judgment?

Answering that question begins with understanding how the structure, ownership and experience of customer decision-making are changing, and why incremental optimization of individual touchpoints is no longer enough.

Four shifts are redefining the consumer journey

1. **Discovery is mediated.** Consumers no longer always begin with a blank search bar. Recommendation engines, AI assistants, social platforms and curated marketplaces increasingly determine which brands enter consideration. Commerce is also moving into these environments, collapsing inspiration, influence and purchase into the same flow. Search visibility remains important, but brands must now also be accurately represented, cited and recommended in AI-generated answers.[1,2]
2. **Choice is compressed.** Options are increasingly filtered, ranked, bundled or timed before consumers fully engage. This can make decisions faster and easier, but it can also obscure the commercial and algorithmic logic shaping what people see. Brands must therefore create relevance without turning convenience into a loss of transparency or control.[1]
3. **Interaction is delegated.** Consumers increasingly hand routine tasks to technology, from research and choice reduction to replenishment, planning and service resolution. Yet willingness to delegate remains bounded: consumers want clear rules, safeguards, escalation routes and the ability to intervene. Intelligent journeys must therefore augment consumer agency rather than quietly replace it.[2]



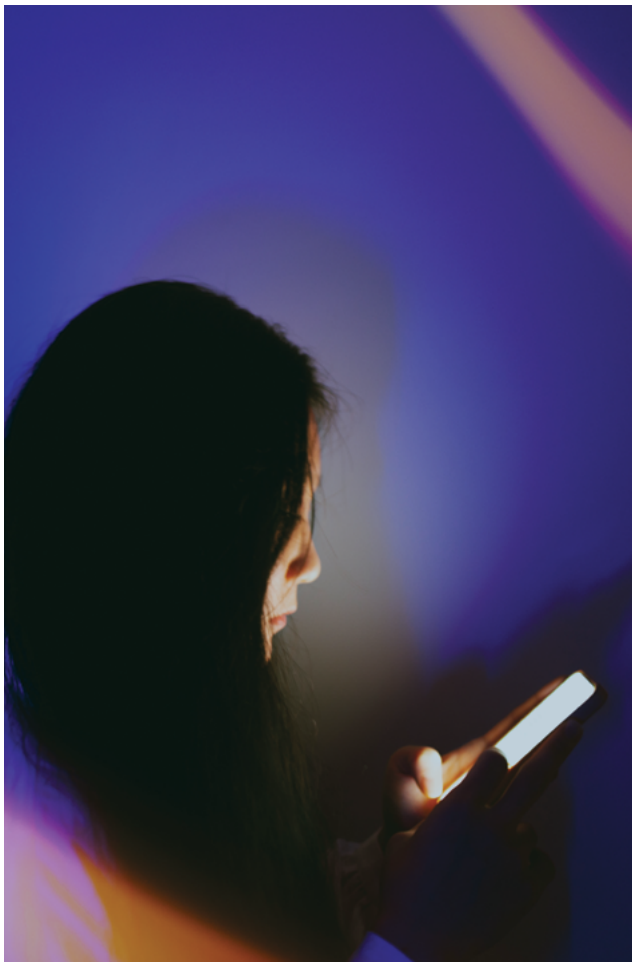
4. **Journeys become contextual and fluid.** The same person can be value-seeking in one moment, convenience-driven in the next and purpose-led in another. Customer interactions move across marketing, sales, service, stores, digital channels and partner ecosystems without following a predictable funnel. Static personas and channel ownership become less useful; organizations need to detect context and intent and respond across organizational boundaries. Capgemini Research Institute findings indicate that customer expectations increasingly change by context, moment and intent, while fragmented organizations still struggle to transfer context seamlessly across channels and interactions.[3]

Together, these shifts redistribute influence across consumers, brands and the intermediaries that increasingly shape discovery, choice and action.

The central paradox: more intelligence, less control

AI gives brands unprecedented ability to personalize experiences, reduce effort and anticipate needs. At the same time, AI-mediated interfaces increasingly influence which brands are visible and how choices are framed. Brands can therefore know more about consumers while exercising less direct influence at the moment of choice.[1,2]

Competitive advantage consequently shifts from controlling a funnel to earning preference across an ecosystem. Relevance remains essential, but it is not sufficient. Trust, memorable experiences, transparent automation and consumer agency become the foundations of durable value.



Three strategic responses

1. **Earn elevated loyalty.** In an AI-mediated world, the strongest advantage may not come from being recommended by an algorithm, but from becoming the brand consumers ask for by name. This requires moving beyond rewards and repeat purchase to create trust, emotional connection, belonging and experiences strong enough to inspire deliberate preference. Research from the Capgemini Research Institute shows that quality, trust and emotional connection increasingly shape perceived value, while meaningful human support continues to strengthen loyalty at important moments.[1]
2. **Build an atomic organization.** A fluid consumer journey cannot be served by a fixed organization. Marketing and customer experience must move from departmental and channel ownership toward end-to-end outcomes, connected intelligence and cross-functional capabilities that can be assembled and reassembled around changing priorities. This is what makes the organization atomic: teams are not permanently fixed around channels or functions, but form around the outcomes the organization needs to achieve. AI can carry more of the operational load, while people set direction, exercise judgment, originate distinctive ideas and remain accountable for trust.[4]
3. **Make transformation real.** Technology alone does not create value. Organizations must align business, data, technology and frontline teams around a shared outcome; test in controlled settings; learn from evidence; adapt roles and governance; and then scale responsibly. The human role becomes clearer, not smaller: people provide expertise, empathy and judgment while AI extends their reach.[5]

What this means for leaders

The shift from managed funnels to intelligent customer experiences creates four priorities:

- **Design around consumer intent and outcomes.** Start from what consumers want to achieve, not from internal channels, processes or handovers.
- **Connect data and intelligence across the experience.** Enable signals, learning and decisions to travel across touchpoints, functions and partners.
- **Organize around end-to-end accountability.** Give teams clear ownership of outcomes and the ability to adapt as priorities and consumer needs change.
- **Preserve trust, control and human judgment.** Make automated decisions understandable, define boundaries and enable consumers and employees to intervene.

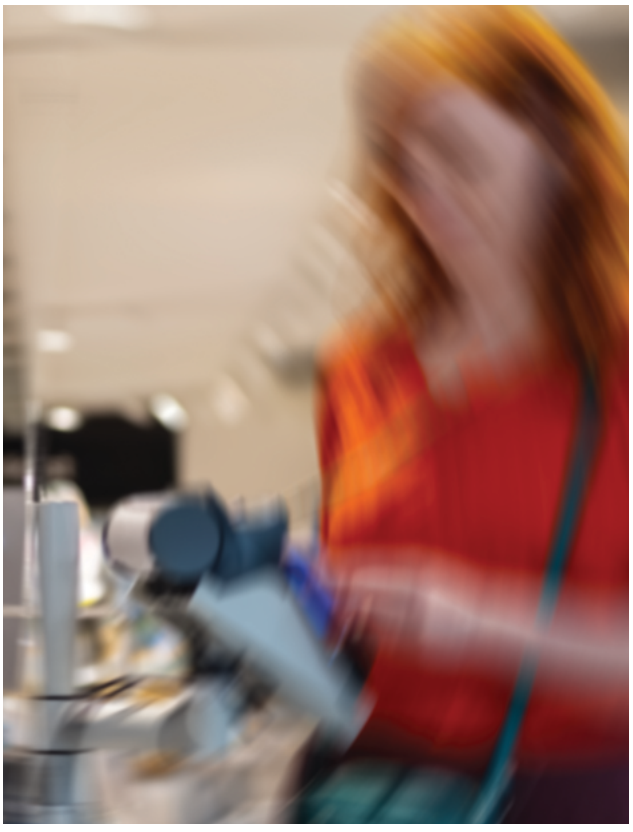
An intelligent journey in practice

Consider a Dutch grocery shopper who discovers a recipe on social media. An AI-enabled assistant uses preferences, dietary needs, budget, availability, loyalty data and previous purchases to suggest ingredients and substitutions. With permission, it checks delivery slots, applies relevant loyalty benefits and prepares a basket. Before anything is ordered, the assistant presents the proposed choices, explains key substitutions and asks the shopper for approval. The shopper can accept, adjust or reject the basket. This simple experience depends on connected data, coordinated decisions and teams working across channels. Routine tasks are delegated, but control remains with the consumer.

The chapter ahead

The articles that follow examine this transformation from three connected perspectives. The first explores how brands can build elevated loyalty when AI increasingly mediates choice. The second considers how marketing and customer experience must reorganize around fluid journeys, connected intelligence and outcomes. The third shows how these principles can be translated into measurable impact while preserving the human contribution.

Together, they offer a practical agenda for turning this shift into sustained customer and business value.







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2.2 Point of view

Loyalty in the age of the intelligent journey

Loyalty is entering a new era.

AI enables personalized experiences more effectively than ever before, with more relevant recommendations, more seamless interactions and more tailored customer journeys. However, with AI assistants and agents increasingly helping to discover products, compare alternatives and guide purchase decisions, brands risk losing direct influence at the moment of choice as decision making shifts to AI-mediated environments.[1]

This is the emerging AI paradox of loyalty: brands have more ability than ever to personalize experiences, while simultaneously having less control over how customers choose. In this environment, loyalty becomes a critical competitive advantage. The brands that succeed will be those that create experiences customers remember, trust and actively seek out.

The question then is how organizations remain preferred in an AI-mediated world. Achieving this requires a move beyond loyalty that's focused on retention and repeat purchase. Organizations need to elevate loyalty to the next level and build preference, trust and relevance across the entire customer journey.

The challenge to win this elevated loyalty is already becoming visible in the Netherlands. Product discovery is increasingly shaped by both AI and social influence. Nearly 25% of Dutch consumers use generative AI for shopping-related activities, 68% are willing to act on AI recommendations, and almost 60% use generative AI instead of traditional search for product recommendations.[2] In short, loyalty is increasingly formed before a purchase takes place and often through channels that brands do not fully control.

Highlights

- Organizations need to rethink how they create value and relevance throughout the customer journey
- Loyalty programs remain one of the most effective ways to create direct relationships with customers
- Preference is built through experiences strong enough to create conscious override in an AI-mediated world

How can companies shift toward elevated loyalty?

Elevated loyalty requires a different approach. Rather than optimizing transactions, organizations need to rethink how they create value and relevance throughout the customer journey. We see leading brands making four fundamental shifts, with AI acting as an accelerator across each of them.

Four fundamental shifts

- From fragmented to holistic with orchestration
- From static to adaptive with self-optimization
- From consumptive to regenerative with prediction
- From individual to collective with co-creation

From fragmented to holistic with orchestration

Many organizations still manage loyalty through disconnected teams, campaigns, and touchpoints. Yet customers expect seamless interactions across app, store, service, and web.

Loyalty programs play a critical role in making this possible. Beyond rewards, they create ongoing value exchanges that encourage customers to share consented first-party data that provide insights to create those seamless interactions. This integrated customer experience is enabled through orchestration from a unified commerce backbone.

Kruidvat's renewed digital ecosystem illustrates this shift by connecting online and offline interactions into a more unified customer experience that combines stores, loyalty, customer data, digital platforms and personalization.[3]

From static to adaptive with self-optimization

Traditional loyalty programs are built around fixed rewards, predefined segments, and campaign cycles. Adaptive loyalty takes a different approach. Powered by AI, it continuously learns from customer behavior, context, shopping missions and changing needs to deliver increasingly relevant experiences throughout the individual customer journey. Loyalty becomes less about managing campaigns and more about continuously adapting to customer intent.

Albert Heijn's AI-powered ecosystem illustrates this shift. Through personalized meal inspiration, recipe recommendations and its AI assistant Steijn, the retailer helps customers make food and shopping decisions tailored to their preferences, dietary needs and available ingredients.[4]

From consumptive to regenerative with prediction

Traditional loyalty programs are designed to drive transactions and reward consumption. Elevated loyalty broadens that ambition. It seeks to create value for the customer, but also for society, communities, and the environment by anticipating and enabling better choices.

Consumers increasingly expect brands to help them make more responsible choices, yet there remains a significant gap between intention and action. Loyalty programs are uniquely positioned to bridge that gap by predicting and rewarding behaviors that create long-term value.

IKEA illustrates this shift through initiatives such as its buyback and resale services, which encourage customers to extend the life of products rather than replace them. By combining circular services with customer value, brands can encourage reuse, extend product lifecycles and support more sustainable behaviors.[5]

From individual to collective with co-creation

AI may understand individual preferences exceptionally well. However, loyalty has never been built through individual needs alone. People are influenced by communities, social contexts, and shared values. The brands that create belonging and involve customers through co-creation often create stronger loyalty than the brands that simply create relevance.

Rituals demonstrates this shift through My Rituals, a membership program built around experiences, access and personal relevance.[6] As AI increasingly intermediates product discovery and recommendations, these direct emotional connections become an increasingly important source of loyalty.

The AI paradox of loyalty

The AI paradox becomes more visible at the moment of choice. As intelligent assistants increasingly help consumers discover, compare and evaluate products, brands risk becoming more interchangeable. The value shifts from navigation to recommendation.[7]

This does not mean loyalty programs become less important. In fact, they become more valuable. Loyalty programs remain one of the most effective ways to create direct relationships with customers and collect consented first-party data. This data helps brands understand customers' intent, creating the foundation for more relevant experiences across the entire journey. And those experiences ultimately create loyalty.

This is where elevated loyalty becomes a competitive advantage. While AI can increase relevance, it cannot create preference on its own. Preference is built through experiences strong enough to create what we describe as conscious override: moments where consumers choose a brand because of previous experiences, emotional connection and shared values, not simply because an algorithm recommended it.[8]

Conclusion

AI is reshaping how customers discover, evaluate and choose brands. While this creates unprecedented opportunities for personalization, it also increases the distance between brands and customer decisions. This makes loyalty more valuable than ever.

The brands that succeed will be those that move beyond traditional loyalty mechanics and embrace elevated loyalty. They will create regenerative value, holistic experiences, adaptive relationships and collective forms of belonging.

Most importantly, they will create experiences customers remember. Because in an AI-mediated world, loyalty is no longer about being the brand an algorithm recommends. It is about being the brand a customer chooses anyway.



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Maaike is an experienced Director CPR specializing in customer experience, loyalty and customer transformation. With over 20 years of experience in CPR companies, she now helps organizations define and deliver customer-led growth strategies by combining deep customer understanding, data-driven insights and business transformation. Passionate about creating lasting value, Maaike works with leadership teams to translate customer needs into differentiated experiences, stronger loyalty and sustainable business growth.

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Eline Persons

Manager frog Customer Strategy

Eline is a Managing Consultant specializing in customer experience, loyalty and customer strategy across retail and consumer products. She helps organizations uncover what matters most to customers and the business, and translate these insights into strategies and solutions that drive growth, engagement and long-term value. Known for her pragmatic and results-driven approach, Eline combines customer-centric thinking with creative problem-solving to tackle complex business challenges and turn strategy into tangible impact.

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Tim van de Lagemaat

Manager Consumer Products and Retail

Tim is a Managing Consultant specializing in loyalty, customer experience, and large-scale business transformation within retail and consumer products. With over 5 years in the CPR business, he now helps organizations design and deliver growth initiatives that strengthen customer engagement, unlock commercial value, and drive operational excellence. Combining strategic thinking with hands-on program leadership, Tim is passionate about turning complex challenges into practical solutions and bringing business and technology teams together to deliver lasting impact.

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2.3 Point of view

The atomic marketing organization

Consumer journeys are becoming fluid, AI-mediated, and increasingly delegated. Most marketing organizations however still operate through fixed teams, campaigns, and handoffs. To keep pace, the organization must become as adaptive as the journey itself.

Highlights

- The consumer journey has changed faster than the marketing organization.
- Competitive advantage comes from compounding intelligence, not simply deploying more AI.
- AI should scale distinctive ideas, not accelerate generic content.
- Marketing must shift from departmental ownership to end-to-end outcome ownership.
- Human judgment, originality, and trust become more valuable as execution becomes automated.

The consumer journey is evolving faster than the organization

The consumer journey has evolved beyond the predictable sequence that brands once mapped from awareness to consideration and purchase. As explored in the introduction of chapter 2, consumers move between search, social, marketplaces, stores, and brand channels in ways that are increasingly dynamic and difficult to predict. Recommendation engines already shape what people discover, while AI assistants are beginning to compare, recommend, and act on their behalf. In other words, the consumer has become fluid while the organization serving them has remained largely fixed.

Most marketing organizations are still structured around brands, channels, functions, and campaign calendars. Work moves from insight to strategy, creative, media, commerce, and measurement through a series of handoffs. Each team optimizes its own part of the journey, often using its own data, technology, and measures of success. That model made sense when journeys were relatively predictable and marketing activity happened in campaigns. It becomes a constraint when intent can emerge anywhere and change in real time.

The numbers illustrate the tension. 64% of CMOs say overcrowded MarTech environments prevent them from delivering the customer experiences they want, while marketers spend around 40% of their time reporting rather than creating experiences. 42% say their organizational structure leads to duplicated effort and only 30% of organizations use their own data effectively.[1]

Intelligence that compounds

The instinctive response is often to add more AI: more automation, more agents, and more tools. But access to AI will not create lasting advantage when everyone has access to similar technology. The advantage comes from what an organization learns with it.

Today, much marketing intelligence is disposable. A campaign runs, a dashboard is reviewed, insights are presented, and the next campaign starts again. Valuable learning disappears into presentations, teams or platforms rather than improving the next decision.

In an adaptive marketing system, every interaction becomes a signal that improves what comes next. Search behavior informs content. Content response informs propositions. Commerce signals improve targeting. Service interactions shape the next experience. The system remembers not just what worked, but increasingly why it worked.

That creates an advantage competitors cannot simply acquire by buying the same AI platform. The winners will not be the organizations with the most AI. They will be the organizations whose use of AI becomes smarter with every interaction.

The rise of unprompted creativity

The same principle applies to creativity. Generative AI has dramatically increased the amount of content organizations can produce. But volume is no longer scarce. Distinctiveness is. If every organization uses similar models to generate similar content from similar prompts, AI risks creating an abundance of perfectly competent but entirely forgettable marketing. Scaling mediocrity faster is not a competitive advantage.

AI creates the most value when it scales strong ideas while leaving the thinking that creates them to people. This shifts human effort toward the moments where it creates the most value: identifying an original insight, creating a distinctive idea, exercising taste and judgment, and ensuring the result remains recognizably true to the brand. Once that direction is clear, AI can take on far more of the operational middle: adapting assets, generating variations, coordinating execution, and optimizing distribution.

The implication is counterintuitive. As execution becomes easier to automate, human originality becomes more valuable.



From department ownership to outcome ownership

Making this work requires more than improving workflows inside today's organization. Marketing and CX need a different organizing principle: start with the outcome, not the department. That outcome could be growing a category, increasing basket size, acquiring a particular customer group, or improving repeat purchase. Instead of dividing responsibility for that outcome across multiple functions, appoint an Outcome Leader who owns it end to end.

The Outcome Leader brings together the capabilities needed to achieve the result and is supported by AI agents that carry more of the execution. One agent might detect emerging consumer signals, another optimize audience and media decisions, another generate and adapt content, while others monitor commerce performance or customer response. Cross-functional teams can then form around outcomes and change as priorities change, rather than remaining fixed around channels and tasks.

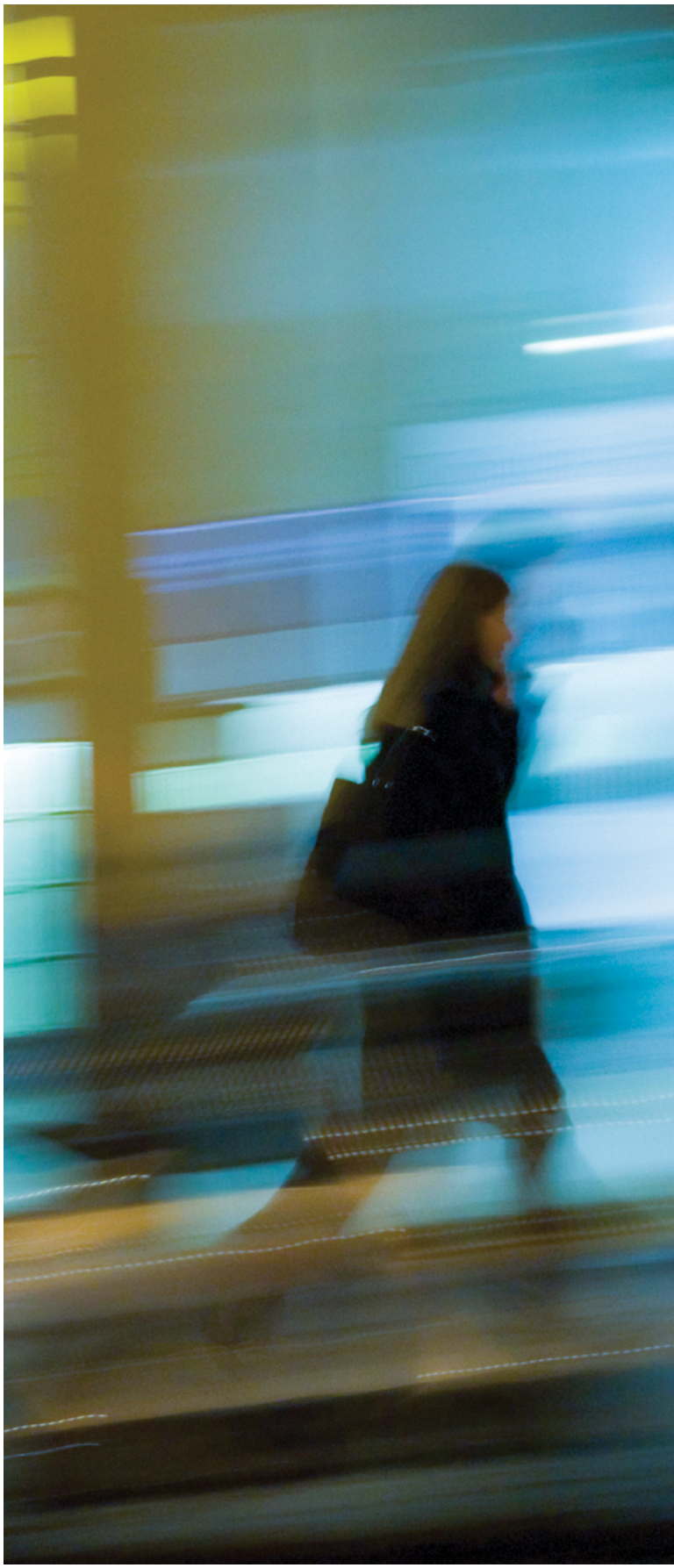
This does not remove human responsibility. It concentrates it. People remain responsible for defining the ambition, making trade-offs, originating ideas, and deciding where automation should - and should not - act. They retain accountability for trust, brand integrity, and the choices that require judgment rather than optimization.

Underneath this model sits a unified data and technology layer. Shopper, product, content, and commerce data need to connect so that intelligence can travel across the journey rather than stopping at organizational boundaries. AI agents then become an operating layer across that foundation, translating signals into coordinated action. Over time, the role of the marketer changes with it: from operating tools and managing handoffs to setting intent, steering intelligence, and owning outcomes.

The destination is not an autonomous marketing department. It is an adaptive one: a system in which technology carries more of the operational load while people concentrate on the decisions that make the brand different.

Conclusion

The consumer journey is already becoming more fluid, intelligent, and agentic. Marketing organizations now need to follow. Simply adding AI to existing teams and workflows will not be enough. Competitive advantage will come from organizations that continuously turn experience into intelligence and use AI to scale creativity without sacrificing distinctiveness. That requires a shift from departments and handoffs toward end-to-end outcome ownership, supported by connected data, technology and AI agents. As execution becomes increasingly automated, the human role becomes clearer, not smaller: setting direction, creating what has not existed before, exercising judgment, and protecting the trust and integrity of the brand.







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Tim works with Marketing and Digital leaders to uncover growth opportunities and create differentiated experiences and innovations. He specializes in connecting marketing strategy with data, technology, and AI, bringing art and science together. Tim leads frog's Customer Data & Technology team, developing advanced MarTech and AI-powered capabilities that help organizations turn customer intelligence into distinctive experiences and business growth.

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2.4 Make-it-real

Unilever Food Solutions

Challenge

Unilever Food Solutions (UFS) is well known in the hospitality industry for brands like Hellmann's, Knorr and Unox. Active in 72 markets and serving millions of customers, the company has a strong global footprint. Still, it currently reaches only 10% of the worldwide foodservice market.

Like many others, UFS still relies heavily on traditional offline, face to face sales and marketing methods. To reach more customers, UFS wanted to embrace Generative AI: to serve customers digitally in a more tailored way, and to scale (hyper)personalized content. But how do you make it real in practice? And how do you preserve the human touch?

Make it Real

AI is not about replacing human capabilities, but about enhancing them. With AI, people can focus even more on the activities that truly create value. Still, employees may perceive AI as a threat, and its impact on both the organization and its people is significant. That's why we approached the UFS transformation with a lot of care:

1. Aligned on Gen AI goals: We defined and discussed the objectives and organizational impact of Gen AI.
2. Ran small scope tests: These pilots demonstrated Gen AI's potential. Employees saw that Gen AI doesn't replace them, but enables them to reach far more customers in far less time. Seeing real results shifted mindsets and increased willingness to collaborate with AI.
3. Coordinated across teams: We aligned the goals and contributions of the technical team, the data team and the business team. This ensured the solution reflected the organization's values - a prerequisite for smooth and successful Gen AI implementation.

What changed

Since integrating Gen AI into its processes, UFS has seen significant impact. The sales team can now reach twice as many customers, and the success ratio has doubled.

Go to market productivity has improved substantially. With Gen AI, marketers can send five times more personalized emails to customers. In 2019, UFS sent 4 million emails via external agencies; last year, UFS sent 23 million hyper personalized emails, without any agency costs.

Gen AI powered chatbots now respond to customer questions far more precisely and naturally than traditional solutions. In this respect, AI has made customer contact more personal, not less.

What's next

Building on these results, UFS is ready to scale Gen AI further across markets and customer journeys. The next step is to connect customer, product and behavioral data more effectively, enabling even more relevant interactions across email, conversational channels and sales touchpoints. At the same time, continued attention to governance, data quality and employee adoption will remain essential. By combining AI's reach and speed with the expertise and empathy of its people, UFS can move closer to serving the full potential of the global foodservice market without losing the human touch that sets it apart.



Chapter 3

Resilient operations

3.1 – Introduction



How organizations protect the value promise when normal operations no longer apply

A distribution center loses power. A critical supplier drops out. A technology service becomes unavailable, taking planning or payments with it. The disruption may begin out of sight, but consumers experience the consequence directly: a product is unavailable, an order is delayed, a store cannot trade or an essential service is no longer within reach. In consumer products and retail, resilience becomes real at the moment an operational dependency turns into a broken customer promise.

That moment is becoming harder to prevent through conventional planning alone. Geopolitical tension, trade restrictions, cyber threats, climate events, energy volatility and shortages of materials or expertise increasingly reinforce one another. A company can be efficient at every individual step and still be vulnerable as a system. The leadership challenge is to build an organization that can see exposure, make trade-offs and act before disruption reaches the consumer.

"You can prepare for many types of crises, but the most significant challenges often come from unexpected directions."

Ton van Veen

Resilience is a value decision

For years, operating models were designed mainly around cost, scale and predictable flows. Supplier bases were rationalized, inventories reduced and processes standardized. Those choices created value in stable conditions, but they also concentrated dependencies. Efficiency isn't a bad thing in itself. The problem is that efficiency without options becomes fragile when several assumptions fail at once.

The obvious response is to add stock, suppliers, capacity and backups. Yet every additional layer has a price. It can absorb working capital, weaken purchasing leverage, increase complexity or raise product cost. Consumers value availability and reliability, but they continue to judge price and fairness. Resilience that is applied indiscriminately can undermine the value proposition it is intended to protect.

The boardroom question is more precise: which customer promises, products, locations, capabilities and dependencies are important enough to protect, and what



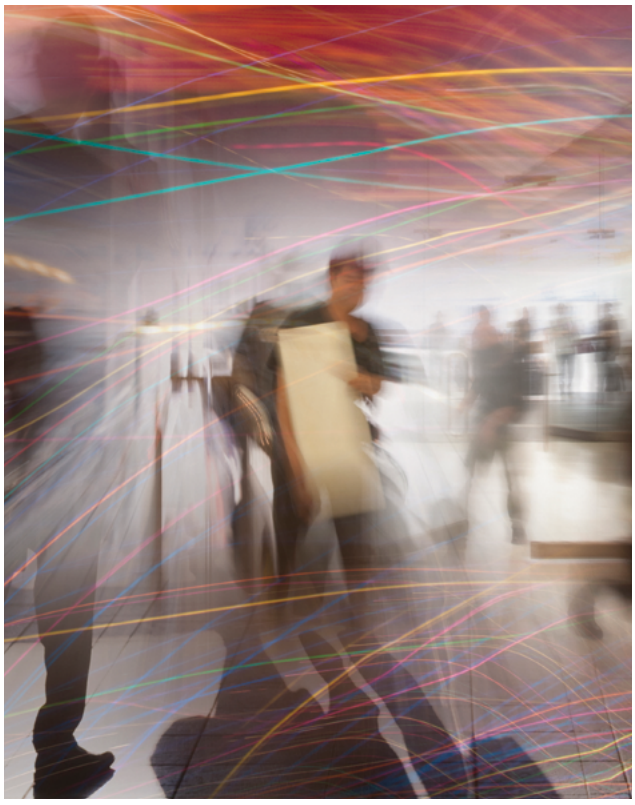
premium is justified? This makes resilience a portfolio of explicit choices. Some risks demand prevention. Some require a tested fallback. Others should be monitored and consciously accepted. The quality of those choices matters more than the volume of contingency measures.

From visibility to decision advantage

Many organizations do not lack data, but they lack a connected view of what that data means for the business. Signals about demand, inventory, transport, supplier risk, production and technology often sit in different functions and move at different speeds. By the time they are reconciled, the window to act may already have narrowed. External research increasingly describes this delay between signal and action as a material source of lost value. Resilience depends as much on decision latency as on physical buffers.

AI can reduce that latency. Connected operational data, scenario models and digital twins can reveal where risks accumulate, estimate the impact on service, margin and cash flow, and compare possible responses. AI-enabled risk processes can support the sequence from detection and relevance assessment through impact analysis, scenario generation and execution monitoring. Used well, this turns risk management from a periodic review into a continuous decision capability.

But intelligence without authority does not improve resilience. A recommendation has value only when owners, thresholds and decision rights are clear. Leaders need to decide which actions can be automated within guardrails, which require human approval and which situations must be escalated. AI should increase decision confidence and speed while preserving accountability. The differentiator is not the number of models deployed, but whether insight can travel through the organization and trigger coordinated action.



Redesign the operation, not only the response

Resilience also exposes a more fundamental problem: fragmented operations. When planning, sourcing, manufacturing, logistics, service and finance optimize their own outcomes, disruption creates handovers, debate and delay. Adding AI to one isolated step may make that step faster while leaving the end-to-end result unchanged. The operating model itself must be able to respond as one system.

This requires common process standards, connected data and clear accountability for end-to-end outcomes. It also requires a different relationship between global scale and local action. Standardization can create the visibility and repeatability needed to scale technology, while local teams need the authority to handle market context and exceptions. The objective is to remove avoidable variation, surface exceptions sooner and move decisions to the level where action creates most value.

The practical case described elsewhere in this chapter illustrates that point. A global consumer goods organization simplified operations across the customer value chain, connected data and grouped activities into global hubs. AI and intelligent automation augmented human workflows, while the integrated model created a stronger basis for service, agility and scaling innovation. The relevant lesson is that process, data, technology, organization and people have to change together. Otherwise pilots remain local, insight remains fragmented and resilience remains a plan rather than an operating capability.



Resilience extends beyond the enterprise

No retailer or consumer-products company controls all the systems on which it depends. Food availability relies on suppliers, distribution, transport, power, connectivity, payments, public infrastructure and people able to keep critical processes running. Digital operations add further dependencies on platforms, models, data and specialized expertise. A fallback that has never been tested with the partners expected to deliver it is not yet a capability.

This is why resilience must be designed at ecosystem level. Organizations need a shared view of critical flows, minimum operating modes and escalation routes. They need to know what can be simplified during disruption, which locations or products take priority and where scarce capacity creates the greatest societal and customer value. Collaboration is not a soft addition to the operating model. For essential services and highly connected value chains, it is part of the resilience architecture.

Four shifts for leaders

- **From blanket protection to differentiated resilience.** Focus investment on the promises and dependencies where failure has the greatest consequence.
- **From more data to faster decisions.** Connect signals to impact, options, owners and action; manage the time from detection to execution.
- **From isolated automation to end-to-end operations.** Redesign processes and decision rights before scaling AI across fragmented workflows.
- **From company continuity to ecosystem readiness.** Test critical arrangements across suppliers, infrastructure partners, technology providers and public institutions.

Capgemini Research Institute. The Resurgence of Manufacturing: Re-industrialization of Europe and the US, 2026.
Incisiv and Anaplan. 2026 Supply Chain Resilience & AI Adoption Study.
Inspectorio. State of Supply Chain Report 2026: Trends in AI Adoption Across Retail Supply Chains.



The chapter ahead

The contributions that follow examine resilient operations through connected economic, digital, societal and operational perspectives. Together, they ask how much protection is enough, how dependency can remain a choice, how essential systems can continue under pressure and how integrated operations improve the speed and quality of execution.

Their collective message is straightforward: resilience is not the absence of disruption. It is the ability to protect the value promise by understanding what matters, deciding in time and mobilizing the organization and its ecosystem around the response.

The advantage belongs to organizations that convert uncertainty into better decisions before it becomes lost value.



Jan Kazen

Industry Lead Consumer Products & Retail – Capgemini Invent Netherlands



3.2 Interview

Erick Webbe (KickstartAI): Resilience is a choice

For Erick Webbe, CEO of KickstartAI, the real story of AI in retail is about control. Retail and consumer goods companies rely more and more on AI driven processes, but the real vulnerability sits somewhere quieter: most organizations simply don't know how deep their dependency runs. "Resilience mainly comes down to the ability to choose," he says. "Preventing AI from simply happening to you."

A foundation built to share

KickstartAI was founded in 2019 by Ahold Delhaize, ING, KLM and NS, and became an independent non profit in 2022. Webbe knows the organization inside out: he spent three years on its board representing Ahold Delhaize, and ten years at bol.com, rising from data analyst to Head of AI.

What makes KickstartAI unusual is its purpose. The foundation picks up AI problems that matter nationally but that no single company can solve alone. Detecting unattended luggage at train stations without compromising privacy. Predicting patient inflow in emergency rooms. And then, crucially, it shares the solution so others can copy it. "We're built to give the answer away," Webbe says. "That's the point."

The founding partners reinforce that mission. They don't compete with each other, which means they can learn from each other instead. All can contribute unique strengths and expertise, such as NS with its operational complexity, ING with its regulatory sharpness, KLM with its deeply embedded safety culture, and Ahold Delhaize, through bol.com, with one of the country's largest product catalogues. ogether, they form a realistic cross section of how large Dutch organizations actually operate, and a shortcut for spreading good practice across industries that rarely compare notes. At the same time, all share common challenges, such as predicting peak loads and managing processes efficiently. These commonalities are where sharing knowledge and learning together create the greatest value.

The real risk: not understanding your dependencies

Ask Webbe what resilience means, and he doesn't start with firewalls or compliance. Dependency on external technology is normal, he says. The danger is assuming you understand that dependency without ever testing it.

He treats reliance on a cloud provider or model the same way you would any operational risk: map it, test it, and know your fallback before you need it. “Preventing AI from simply happening to you,” he repeats. Not waiting for a system to fail, but knowing in advance what would happen if it did.

He points to a project with Ampere, bol.com’s delivery partner. KickstartAI built a planning model with a dial that lets planners choose how much uncertainty they’re willing to accept. An abstract concept (risk appetite) suddenly became a concrete choice. That’s exactly what Webbe wants organizations to do: make risks visible and manageable.

The Netherlands has a head start it isn’t aware of

Much of Europe’s anxiety about AI centers around its dependence on American and Chinese infrastructure. Webbe’s view is more specific, and more reassuring. Most of KickstartAI’s work doesn’t actually need frontier models or hyperscaler infrastructure. Roughly 80% of their solutions still run on traditional, explainable machine learning models. Because they often just work better.

Generative AI is used only when it earns its place, such as in a financial coaching assistant built with ING. If the hyperscalers went dark tomorrow, Webbe estimates that most of KickstartAI’s work would keep running: “in a pinch, on my laptop.”

It leads him to a hopeful conclusion: the Netherlands has the talent, the infrastructure, and in many companies the digital maturity to be far less exposed than it assumes. What’s lacking is a habit of testing, experimenting, and learning by doing.

Know your exposure, before you’re confronted by it

Webbe’s core message is simple: you need to know what it costs to be able to choose. Take replacing a frontier model with an open alternative. If the performance drop is one percentage point, you have a real choice. But if it’s ten, twenty or forty points, you have a problem you cannot solve on the day you discover it. Most organizations have never run that comparison. They assume flexibility they haven’t tested.

His advice is deliberately blunt: switch off a system the business depends on for a day and see what happens. Ask your technical team: what would it take to move this workload somewhere else? A day of work? A month? A year with a hundred people? “The size of that answer,” he says, “is the size of your risk.”

The danger of doing nothing

Webbe warns that organizations that avoid these questions will fall behind. Often without noticing. He illustrates it with a simple thought experiment: a process with eight steps. Most companies ask whether step five can be improved with AI. This would produce a neat pilot and a good news story. But true disruptors ask a different question: does this process need to exist in its current form at all? Not going from twenty people to eighteen, but from twenty to two. Doing so opens up opportunities to create more value for customers, improve service delivery, and often increase employee satisfaction as well.

He points to professional services. A traditional law firm can spend years making its workflow marginally more efficient. A leaner rival can fine tune a model on the firm’s own domain expertise, cut most manual review work down to a few specialists, and undercut the incumbent’s cost base dramatically. The second firm doesn’t just win on price, it resets what clients expect the whole market to charge.

Resilience is all about autonomy

For Webbe, resilience is about autonomy. Autonomy that keeps a company making its own choices instead of reacting to someone else’s. Waiting for certainty is itself a decision, and an increasingly expensive one. Plus, that certainty will never emerge.

He offers executives a simple bedside test: “Ten seconds before falling asleep, ask yourself: Am I comfortable with my current level of control and autonomy? If it keeps you awake for a quarter of an hour, you already know you need to act, even if you don’t yet know how.”

For Dutch retail and consumer goods leaders, that question is no longer theoretical. The world isn’t stabilizing. Dependencies aren’t shrinking. And the cost of waiting is rising.



Erick Webbe

CEO of KickstartAI



3.3 Interview

Ruud Limmen (Albert Heijn) on making resilience a shared capability

Ruud Limmen knows Albert Heijn from almost every angle. Over more than 30 years, he has led stores, distribution operations, replenishment, transport, value-chain development, supply-chain innovation and omnichannel retail. Today, he chairs Albert Heijn's Incident Management Team and the Bloemencentrale, Albert Heijn's production facility for flowers. Almost two years ago, Albert Heijn's board asked Limmen to take responsibility for resilience and explore what it means for the company, the wider food chain and the communities that depend on it. He became member of the Kopgroep Nationale Weerbaarheid. His breadth of experience at the company matters: resilience is not a separate technical discipline, but a question of whether the entire retail system can keep serving society when normal conditions disappear.

From business continuity to resilience

Business continuity is not new to food retail. Albert Heijn and its partners have plans, accountable teams and testing arrangements for operational disruptions. Limmen describes it as an established professional discipline. Resilience adds a wider lens: what happens when several vital systems fail at the same time, or when the disruption differs from the scenarios the organization prepared for?

Extreme weather, geopolitical tensions, cyber risk and dependence on electricity and digital infrastructure can hit several points in the chain simultaneously. A store may have products but no power. A distribution center may have power but no network. Trucks may be available but unable to charge, refuel or move through disrupted infrastructure. For food retail, the practical question is this: can essential distribution and store access continue when several dependencies fail?

Protect the retail supply chain first

The Netherlands cannot create a parallel food system when a crisis occurs. The volumes are too large and the dependencies too interconnected. The most effective strategy is to keep the existing chain functioning: suppliers, distribution centers, transport and a geographically balanced network of accessible stores.

Increasing mechanization makes distribution centers more productive, but also more dependent on uninterrupted

power and technology. Permanent emergency power is more logical at critical distribution centers than at every individual store. Transport is part of the same backbone: roads and tunnels must remain usable, fuel or charging capacity must be available and vehicles must be able to keep moving. Limmen: “The retail supply chain is crucial. Much of the Dutch food supply runs through a limited number of distribution centers. If those stop, the impact is felt almost immediately.”

The store as an anchor in the neighborhood

A distribution center is invisible to most consumers; the local supermarket is not. The store is a familiar place in the neighborhood where people obtain essential products, information and practical help. When every store in an area closes, an operational issue quickly becomes a societal problem.

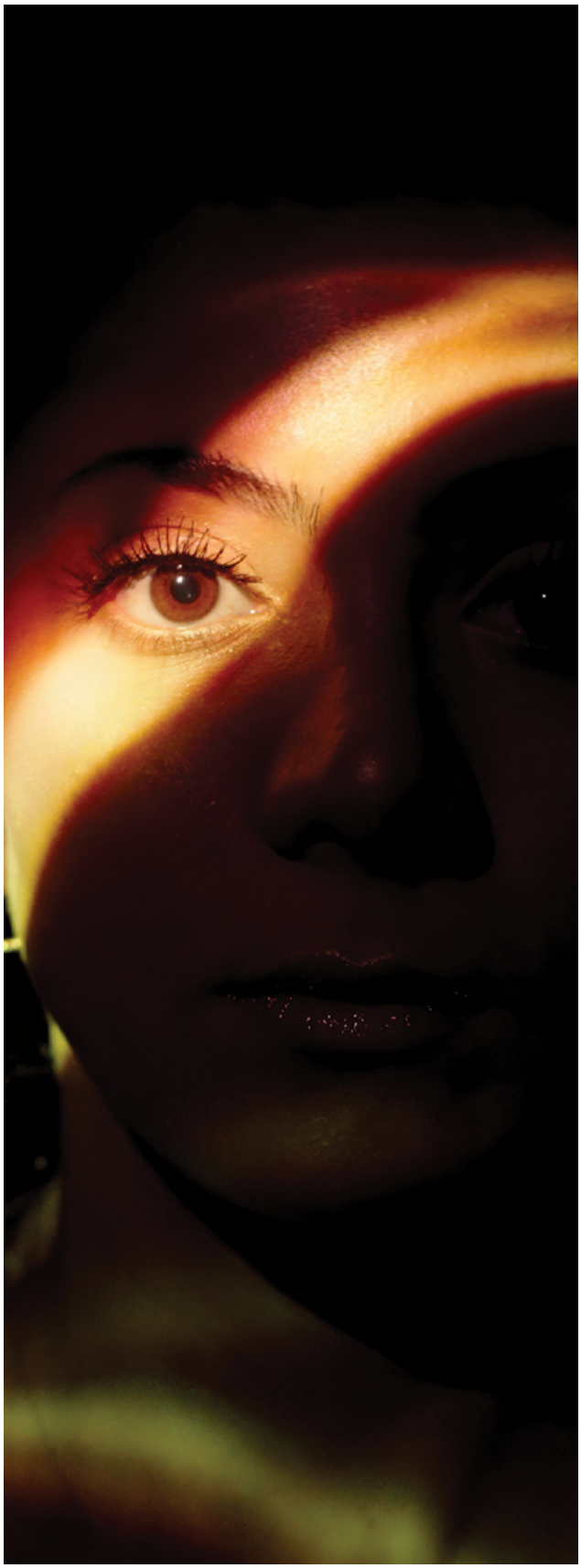
The ambition is not to make every store fully independent. It is to keep enough stores accessible in the right places and to agree what they must still provide: safe access, a basic assortment, working cooling, simple payment, reliable information and the ability to receive essential deliveries.

This is a shared responsibility between government, retailers and chain partners, not a competitive opportunity. It creates little societal value if several chains keep stores open in the same location while another neighborhood has no accessible supermarket. Retailers need to coordinate geographic coverage within the applicable legal boundaries. The cost remains a real challenge: resilient power, connectivity and fallback capacity require serious investment. This makes shared, mobile and targeted solutions especially relevant.

Finland: resilience becomes behavior

Limmen’s study visit to Finland with the Kopgroep Nationale Weerbaarheid clearly demonstrated the difference between plans and preparedness. Finland has organized long-term cooperation between government, companies, civil-society organizations and citizens. Scenarios are discussed, roles are understood and preparedness is treated as a normal responsibility.

One practical example is the ‘resilience point’: a location where essential functions reinforce one another. Limmen mentions food, medicines, electricity, internet or telecommunications and fuel. A supermarket can be part of such a location. Emergency power keeps critical store systems running. The same powered site may support telecom equipment and access. In turn, this connectivity enables communication and digital payments. And finally, fuel and charging capacity support logistics and mobility. Limmen: “In Finland, resilience is part of the culture. People prepare for disruption as a matter of course, and organizations behave accordingly. Behavior is what matters most.”



Ukraine: keep the digital backbone working

Ukraine offers another lesson. Limmen's conversations there showed that supermarkets can often remain open, sometimes with a reduced assortment, when electricity, digital connectivity and payments are restored or protected quickly. The ability to improvise and repair is as important as the original contingency plan.

The practical conclusion is not simply "install generators". A resilient store also needs fuel, refrigeration, communications, payment capability, deliveries, safe access and people who can operate or repair the systems. Mobile power can be more flexible than fixed capacity at every store, but only if equipment, fuel, transport, connections and qualified support are available when needed.

The Dutch Kopgroep: shared dependencies require shared solutions

No retailer can tackle the challenge on its own. Electricity, telecommunications, financial services, transport infrastructure, government decisions and food retail are mutually dependent. That's why Albert Heijn participates in the Kopgroep Nationale Weerbaarheid – the National Resilience Initiative. The Kopgroep brings together public and private organizations, including ministries and organizations from energy, gas, telecommunications, banking and food retail, to raise awareness and strengthen practical public-private cooperation. Its value lies in putting shared scenarios and dependencies on the table.

The same principle applies across supermarket chains: resilience is a sectoral responsibility. Cooperation is needed to define critical locations, identify shared dependencies and agree how scarce capacity, such as emergency power, connectivity or transport support, is used when wider disruption affects the country.

From plans to demonstrated readiness

Resilience becomes real only when critical locations, minimum operating modes and fallback arrangements are clear. Retailers and partners need to know which distribution centers and stores matter most, which systems must continue, how a reduced assortment will be supplied, how employees and customers receive information, and who can adapt ways of working when the situation demands it.

These arrangements then need practical testing across organizations, because power switching, mobile equipment, connectivity, payments and escalation routes should also work outside of laboratory conditions. For Limmen, the ambition is deliberately practical: protect the retail supply chain, keep the right stores within reach and organize critical dependencies. And make the right choices before actual disruption forces ad hoc decisions: "Keeping food available during a crisis creates enormous value for society. That is what makes this work and our role as retailers so meaningful."







Ruud Limmen

Among other roles, Resilience Lead and Chair of the Incident Management Team at Albert Heijn



3.4 Point of view

The resilience premium: what are we really paying for?

Supply chains have become the ultimate insurance policy of modern business. After years of disruptions, from pandemics and geopolitical tensions to cyber threats and energy volatility, organizations have invested heavily in making their networks more resilient. But investments in resilience potentially have a much bigger yield than just lower risk; they can be a driver of competitive value. And more resilience isn't always the better outcome.

Highlights

- Resilience is necessary, but it is never free.
- Not every supply chain risk deserves structural mitigation.
- AI should improve trade-off decisions, not justify complexity.
- Consumers may not accept every resilience premium in the final price.
- The winners detect sooner, decide faster, and invest smarter.

Resilience has become a boardroom topic

Few topics have moved up on the executive agenda as quickly as supply chain resilience. What was once considered a procurement or logistics concern now influences sourcing strategies, investment decisions, and long-term growth plans across the consumer products and retail industry.

The shift is understandable. Recent years exposed vulnerabilities that many organizations neither anticipated nor fully understood. Global pandemics, geopolitical tensions, cyberattacks, and energy disruptions challenged long-held assumptions about how supply chains should be designed. The traditional playbook of lowest cost, minimal inventory, and maximum efficiency suddenly appeared insufficient.

Organizations responded accordingly. Supplier diversification, additional inventory buffers, regional sourcing strategies, enhanced visibility, and advanced planning technologies have all become part of the resilience agenda. Yet while the rationale is clear, one important question often gets overlooked: how much resilience is enough?

The resilience paradox

The industry faces a resilience paradox. The measures designed to make supply chains stronger are often the same measures that increase costs, complexity, and operational overhead.

Additional suppliers reduce dependency but can weaken purchasing leverage. Higher inventory levels improve availability but consume working capital. Regional sourcing may lower geopolitical exposure but increase product costs. Redundancy improves continuity but inevitably comes at the expense of efficiency.

The challenge is determining whether more resilience creates more value than it destroys. Because resilience is not an outcome in itself. It is an investment. And like any investment, it should be evaluated based on the value it creates relative to the cost it introduces.

Understanding the resilience premium

Every resilience measure carries a premium. It may appear through additional suppliers, higher stock levels, alternative manufacturing capacity, regionalized sourcing models, enhanced cybersecurity, or sophisticated planning capabilities. Different measures, one common outcome: uncertainty is reduced, but costs increase.

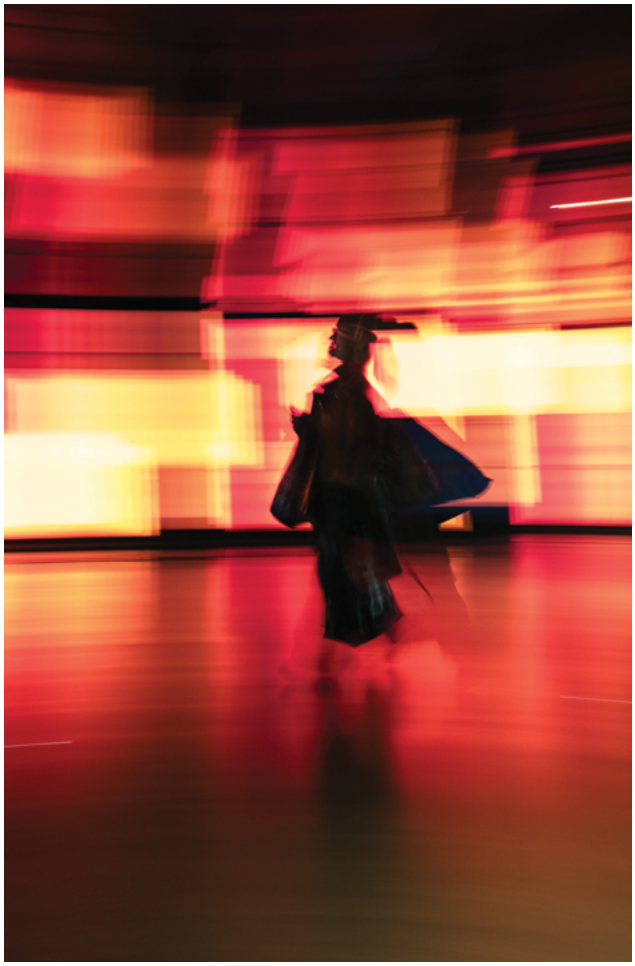
For some risks, the business case is straightforward. If disruption threatens business continuity, food safety, regulatory compliance, customer trust, or employee wellbeing, resilience is essential. Likewise, products and services that fulfill a critical societal role often justify a higher level of protection. But not every disruption falls into this category. Commodity prices fluctuate. Freight rates rise and fall. Demand forecasts prove inaccurate. Suppliers occasionally underperform. Shortages emerge and eventually disappear.

The lesson from recent disruptions should not be that every risk must be eliminated. It should be that every risk must be understood, priced, and consciously accepted or mitigated.

Risk is not the enemy

The business world has become increasingly comfortable discussing risk mitigation. Far less attention is given to risk acceptance. Yet successful businesses have always understood that growth requires calculated risks. Retailers and consumer goods manufacturers make such decisions every day through assortment choices, innovation investments, pricing strategies, and supplier selections. When resilience measures outlive the disruption they were designed to address, resilience can become an expensive form of overcorrection.

Financial markets offer a useful parallel. Investors seek to understand volatility, manage it, and price it appropriately – not eliminate it. Supply chains should be approached in much the same way.



The question nobody can avoid: who pays?

Perhaps the most important question is also the simplest: who pays? For consumer products and retail organizations, this is particularly relevant. Consumers may value availability, sustainability, local sourcing, and reliability, but purchasing decisions are still heavily influenced by price and perceived value.

If consumers are unwilling to pay more, those costs are absorbed elsewhere. They show up in margins, supplier negotiations, productivity targets, operating budgets, or shareholder returns. This creates a difficult but necessary leadership discussion.

The answer lies in resilience by design. This means identifying critical products, suppliers, markets, and customer commitments, and focusing investments where the consequences of failure are greatest. It means making deliberate trade-offs between cost, service, risk, and growth rather than applying resilience measures indiscriminately. It also means accepting that some volatility and uncertainty will always remain. This is and always has been the reality of doing business.

AI's real role in resilience

The debate about resilience is often framed around inventory, suppliers, buffers, redundancy and contingency plans. While these measures remain important, they are ultimately expensive ways of compensating for limited visibility and slow decision-making.

The next generation of supply chain leadership will be defined less by the ability to eliminate risk and more by the ability to make intelligent trade-offs under uncertainty. And this is where AI comes in. AI-powered supply chains can create genuine value, operating with near real-time visibility across supply, demand, inventory, logistics, and external risk signals. This will enable organizations to identify potential disruptions earlier, assess their impact faster, and evaluate response scenarios before issues materialize. In this sense, AI will help leaders make better decisions about where resilience creates the greatest value.

Conclusion

Supply chain resilience is no longer optional, but neither is commercial discipline. The challenge is building the right resilience. Ultimately, resilience will not be measured by how much risk is removed, but by how effectively organizations respond to uncertainty when it occurs – or even, before it occurs.

Competitive advantage will no longer come from having the largest buffers, but from making better decisions sooner. Resilience will become a dynamic management discipline rather than a static operating model.

In the coming decade, resilience will increasingly be measured by the ability to outperform competitors when disruption occurs.







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3.5 Make-it-real

Resilience by design

Hub of the future: reinventing global business operations

A global consumer goods company with a presence in 190 countries and a portfolio of more than 400 brands manages one of the world's most complex supply chains. To continue serving customers effectively at that scale, the organization needed to radically simplify global operations, break down functional silos, and accelerate digitization. The challenge was to create a more integrated and consistent way of working across the end-to-end customer value chain while improving agility, decision-making, service delivery, and innovation.

Make it real

Capgemini partnered with the organization to launch an end-to-end transformation program aimed at creating a standardized, fully integrated global operations model. Together, the teams reimagined the customer value chain from demand planning through cash collection. They redesigned processes across functions to create one consistent, digitalized value chain; connected data flows through a unified data lake to strengthen decision-making; and centralized processes into seven global hubs. A distinctive part of the program was augmenting human workflows with advanced AI and intelligent automation, enabling people to focus more on innovation and high-impact work.

What changed

- Elevated multiple end-to-end processes into seven centralized global hubs.
- Streamlined operations and improved service delivery across the customer value chain.
- Accelerated innovation and enabled successful pilots to move into full production faster.
- Increased agility in responding to changing market demands.
- Established a strong digital foundation and optimized partner ecosystem to support growth, innovation, and resilience.

What's next

As its digital foundation matures, the organization can continue scaling successful pilots into production and extending integrated operations across the business. The priority will be to use connected data, intelligent automation, and its partner ecosystem to respond faster to changing market demands while strengthening innovation, service delivery, growth, and resilience globally.



Chapter 4

Future-proof stores

4.1 – Introduction

For decades, retailers optimized stores for transactions. In the next decades, stores will be judged on the value they create per visit. If a store cannot save time, solve a problem, provide expertise or create emotional connection, AI-enabled shopping journeys will increasingly bypass it altogether. Physical stores need to evolve into dynamic value platforms where operations, experience, and ecosystems are orchestrated in real time. As AI is rapidly becoming the primary interface for discovery, comparison and transaction initiation[1], store visits are becoming more intentional, and consumers have higher expectations around relevance, experience, and service. Dutch consumers already switch quickly; when value is lacking, 84% would switch for a better regular price.[2] As a result, value per visit should become a key success metric.

This shift demands a fundamental reimagining of the store's role. Leading retailers are transforming their physical stores from static, format-driven locations into stores designed to fulfill distinct human needs in real time. Behind the scenes, intelligent store operations powered by AI and real-time data are starting to orchestrate inventory, staffing, pricing, and customer engagement seamlessly to simplify operations, save costs, and improve customer experience. The store will become a continuous learning system.

At the heart of this transformation is the workforce. Roles are shifting from rigid job descriptions to fluid, skill-based models where AI removes operational friction, enabling employees to focus on higher-value interactions. Dutch shoppers still place high value on human interaction at key moments and expect a combination of efficient self-service and accessible human support.[3]

Five key highlights

- From traffic to value: store success will be defined by value per visit
- From format to intent: shift to a portfolio of tailored store concepts
- From silos to orchestration: connecting commercial, operational, and customer decisions
- From tools to store operating system: continuously optimizing pricing, staffing, inventory, workforce and customer flow
- From roles to capabilities: skill-based teams creating value



The need to transform

In the Netherlands the pressure to innovate is strong as labor shortages and rising operational costs put traditional store models under pressure. At the same time, consumers expect seamless experiences, demand lower prices and faster service. Where 75% of consumers expect this, only 41% believe retailers deliver this[4]. In the long run, the solution lies not in cutting corners, but in redefining the store's purpose to win customers' time and attention while simplifying operations. Retailers need to move from stores as formats to stores as intelligent value platforms.

From traffic to value

Retailers have spent decades optimizing traffic,conversion and basket size. Those metrics assume that more visits create more value. AI challenges that assumption. As shopping journeys become more efficient, the winning retailers will see fewer visits but create significantly more value during each visit. Store visits will become more intentional, and consumers arrive with higher expectations around experience and service at all touchpoints.[5,6] Value per visit should become the store's key performance metric. Salesforce highlights growing demand for personalized, connected, and experience-led shopping journeys.[7] Rituals illustrates this shift by turning stores into destinations for discovery, engagement and wellbeing, encouraging repeat interactions beyond the point of purchase.[8]

From Format to Intent

The traditional single store format will be losing relevance. frog, part of Capgemini, emphasizes that stores must be designed around human needs[9]. A location may act as a convenience express for low-friction missions, a circularity node for repair and resale, or a brand experience environment that creates emotional connection. The point is to make every store play a clear role in a connected network. IKEA illustrates this well: its city-center Planning Studios focus on high-consideration needs such as kitchens and bedrooms rather than replicating the full big-box format, matching each location to a specific customer intent and context.[10]

From siloed functions to orchestration

Orchestration will enable retailers to move beyond one-size-fits-all models. Leading organizations will break down silos between customer experience, supply chain, and store operations through a unified commerce backbone and accelerated optimization with AI. Retailers that break down data are better positioned to respond in real time, optimize operations and deliver more consistent customer experiences.[11] Inditex (Zara) operates a connected ecosystem where real-time inventory visibility, RFID and integrated replenishment link stores and supply chain operations. This enables seamless cross-channel fulfillment, faster decision-making and more agile execution.[12]

From tools to store operating system

Retailers will be managing intelligent retail systems, not just stores. The future-proof store increasingly functions as a real-time operating system, built from three connected layers: an experience layer that shapes customer journeys, service, and engagement; a decision layer where AI, analytics, and pricing logic live; and an execution layer covering inventory, staffing, fulfillment, and supply chain. Over time, the store will become a self-optimizing environment, continuously adapting to changing demand, context, and consumer expectations.

Albert Heijn illustrates this in a Dutch grocery context. Using AI-driven demand forecasting and dynamic pricing, the retailer continuously adjusts bakery production and markdowns throughout the day based on local demand, helping reduce waste while better aligning supply with customer needs.

From roles to capabilities

This evolution is mirrored in workforce transformation. The traditional cashier or shelf-stocking role is giving way to hybrid roles: facilitators who guide customers through seamless checkout and fulfillment, and advisors who offer expert guidance on products. According to Everest Group, skill-based workforce models in retail improve productivity by up to 35% while increasing employee retention. The next-generation store will win because it redeploys people into moments that matter. At Decathlon Netherlands, staff equipped with AI-powered tablets free them from manual operational tasks, so they can dedicate more time to welcoming customers and delivering personalized advice and service.

The key is human-AI collaboration. Capgemini's view is that the future is human-led and AI-powered: AI removes friction and improves productivity, while employees focus on the moments where empathy, judgment and human connection matter most.

Conclusion

Future-proof stores in the Netherlands will function as connected operating systems that continuously orchestrate customer value, labor, inventory and fulfillment in real time. They will be efficient (AI-driven), adaptive (data-responsive), and human-centered (experience-led); aligning with evolving consumer expectations as well as operational realities such as cost pressure and tight labor markets. The store will no longer only be a cost to minimize, but a strategic platform for growth.



Maaike Slagter

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Maaike is an experienced leader specializing in customer experience, future-proof stores and customer transformation. With over 20 years of experience in CPR companies, she helps organizations define and deliver customer-led growth strategies by combining deep customer understanding, data-driven insights and business transformation. Passionate about creating lasting value, she works with leadership teams to create seamless customer journeys, enable frontline employees and drive sustainable business growth.

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4.2 Interview

Noortje van Genugten (AholdDelhaize): Human-centered retail begins with empowering the people behind it

For many customers, the grocery shopping journey begins long before they enter the store. It starts at home, with a shopping list, a recipe, or simply the question: what's for dinner tonight? Yet delivering a seamless experience requires thousands of store employees working behind the scenes every day. According to Noortje van Genugten of Albert Heijn, the greatest opportunities lie at the intersection of technology, operations, and customer experience. Not by putting technology at the center, but by enabling employees to perform at their best. "We don't believe in technology for technology's sake," says Van Genugten. "The question is always: what problem are we solving for employees and customers?"

As VP of Product Operations, Noortje's biggest priority lies in matching complex business needs and workforce facing technology. She believes the strength of store experience depends on whether employees feel supported, informed and empowered. Her main points of consideration are practical: how technology can make work easier, how data can reduce waste, how AI can answer real questions, and how stores can stay human even as they become more intelligent.

To Noortje, simplicity trumps sophistication. Technology should feel as intuitive as the apps employees use at home. Processes should follow a clear rhythm. The information should be brought directly to them. And every solution must solve a real operational problem, not introduce complexity for the sake of innovation.

The customer journey starts at home

Online grocery shopping in the Netherlands is still relatively small, but the physical store experience no longer begins at the entrance. "Your grocery trip starts at home," Noortje says. People make lists, browse promotions, and look for inspiration long before they step inside a store. The AH app plays a growing role in that early stage, not as a marketing channel, but as a practical companion.

The most common question in Dutch households remains unchanged: what are we eating today? The app helps with weekly menus, recipes, and even an AI feature that suggests meals based on a photo of the content in your fridge. The goal isn't to push customers online, but to remove friction and provide inspiration before they arrive, so the store visit becomes easier and more purposeful.

AI as a colleague for store employees

While customer-facing innovation is important, Van Genugten and her team also specifically focus on improving the experience of employees working in stores. One example is helping store colleagues handle the wide range of questions they encounter on the shop floor. Supermarkets are full of young people in their first job, and they can sometimes be asked to navigate situations that are new or challenging. "At that age, I didn't know what horseradish was, let alone where to find tarragon," she says, laughing. The aim is to give all employees the tools and support they need to feel confident when helping customers.

To help, Albert Heijn built an assistant for store employees. The first version wasn't even AI, just a front-end where employees could ask questions that were answered manually behind the scenes. That experiment revealed something crucial: almost all questions were about products. *Do we have this product? Where is it? Is it in stock?*

With those insights, the real AI assistant was developed. Today, it handles more than 250,000 conversations per month. Employees use it on PDA devices or on their own phones. Younger workers prefer their phones; older ones stick to the PDA. The assistant learns how employees actually speak. "Ui" was initially interpreted as "user interface" instead of "onion", "Safari" as the browser instead of the liqueur. The model had to learn supermarket language.

The impact goes beyond faster answers. Technology reduces stress, removes searching, and customers receive better service. "AI should make us more human," Noortje says.

Simplicity and focus

Noortje is clear about the principles behind AH's store technology. The first is radical simplicity. No complex systems, no technology for its own sake. "The simpler we can solve it, the better."

The second is focus on the problem. Not starting with a tool, but with the question: what real issue are we solving for employees or customers?

That is why AH brings the norm of the outside world into the store. Employees are often used to fast, intuitive, beautifully designed apps. Store apps must meet that standard. Everything should live in one place: your work, your schedule, your instructions, your questions. One app, one assistant, one experience.

Efficiency through consistency

Albert Heijn is known for efficient stores with minimal staffing. According to Noortje, that reputation doesn't come from automation. It comes from an extremely consistent way of working. AH calls it the "blue beat": a fixed rhythm that defines what happens when. Technology supports that rhythm but doesn't replace it.

Processes are designed so employees know exactly what to do, where to be, and when. Data helps refine that rhythm. For example, counting used to happen because the process required it. Now algorithms determine what actually needs to be counted. Less work, more relevance.

Automation is used sparingly. "In the store, almost everything is still done by people," Noortje says. Robots don't fill shelves or load ovens. Technology supports but does not take over.

One of the clearest examples is the bakery app. Bread is a major source of waste because it is so perishable. Employees used to decide how much to bake based on



experience. Now an algorithm predicts demand, accounts for substitution, manages safety stock, and generates a simple task overview. But the goal is not just less waste. It is ensuring customers see fresh bread at the right moment. Noortje: “Technology must improve both operations and customer experience.”

Sometimes things go wrong. Noortje mentions the attempt to remove discount stickers in favor of digital pricing. It seemed logical: more efficient for employees, less manual work. But customers navigate by stickers. Without them, they simply didn’t see the deals. “Nobody could find the discounted products anymore,” she says. The project had to be reversed.

Scaling beyond pilots

Many retailers get stuck in pilots. Noortje understands why: building the tool is the easy part. Implementing it is the hard part. AH invests as much time in implementation as in development. Testing in stores, observing, adjusting, testing again… and only then rolling out.

The assistant, for example, was first tested with an empty front-end and empty back-end, just to learn what employees actually ask. Voice was removed because employees felt awkward talking to their phones. Complex questions turned out to be irrelevant. The simple question “Where is this product?” was the key.

Removing friction

AI isn’t a hype for Noortje. Retail has used algorithms for years: for forecasting, supply chain, routing, inventory. The new generation of AI can help make decisions humans can’t oversee, but only if it solves a real problem. “Before you know it, you’re doing AI for AI’s sake,” she says.

The real value lies in removing friction. For customers: making ‘what are we eating today?’ easier. For employees: bringing data to them instead of making them search. For stores: simplifying processes, reducing waste, making work lighter.

But it all starts with data. “If you don’t have your data, you’re not doing anything.” And it starts with vision: knowing where you’re heading, so you’re not just optimizing today’s process but building tomorrow’s store.

Imagination

If Noortje had to name one thing that blocks progress, it is this: lack of imagination. Retailers often focus on this year’s KPIs, this quarter’s margins. But the world is changing faster than ever. Without forward thinking, you fall behind.

“Dream about the future and make it concrete,” she says. Not building something that will only work in five years, but having a direction and taking daily steps that already create value. For everyone involved.







Noortje van Genugten

Vice President Product Core Retail
Albert Heijn, Etos, and Gall & Gall



4.3 Point of view

The capability crunch in Dutch retail

Walk into a Dutch store today and the operating system is already running. A colleague guides a customer through self-checkout, checks stock on a handheld device, responds to an online order and solves an operational exception before the next queue forms. The store is no longer a physical endpoint where retail work is simply executed. It is becoming a live operating system where customer experience, fulfillment, data, technology and people interact continuously.

This changes the workforce question. Retailers do not need more labor; they need a human orchestration layer capable of translating digital signals into better store execution. Frontline employees are becoming the layer that connects systems to service, automation to judgment and operational complexity to customer trust.

Vacancies for Dutch retail sales employees fell by more than 4,100 between Q1 2022 and Q1 2025, a decrease of approximately 28%.[1] On paper, this may suggest easing labor pressure. In reality it signals a shift in what scarce retail talent must be able to do. The constraint is moving from availability alone to orchestration capability: the ability to coordinate customers, colleagues, systems, stock, fulfillment and exceptions in real time.

This makes the leadership question for Dutch retailers more specific than just “is the workforce future-ready?”. It should be: who will orchestrate the future-proof store? Competitive advantage will come to retailers that design the frontline workforce as a deliberate human orchestration layer, not as a legacy labor pool surrounding new technology.

Highlights

- **The store is becoming an operating system.** Customer journeys, fulfillment flows, inventory signals, employee tasks and digital tools increasingly interact in real time.
- **The frontline workforce is the human orchestration layer.** Employees turn digital signals into service decisions, operational interventions and customer confidence.
- **Orchestration capability is becoming the new constraint.** The next performance gap will not only be about labor availability, but about whether retailers can build digital confidence, situational judgment and cross-channel coordination at scale.
- **Strategic Workforce Planning must become orchestration planning.** Retailers need visibility into the capabilities required to run the future store operating system, not only into headcount gaps.
- **Employee experience determines system performance.** The store operating system only works when employees feel equipped, trusted and empowered to act on the information technology provides.

The store is becoming an operating system

Technology is increasingly embedded across the retail value chain. Self-service checkout, automated replenishment, digital fulfillment, AI-supported planning and omnichannel journeys are no longer peripheral innovations; together they form the operating logic of the modern store. The store now functions as a live system. Customer demand triggers fulfillment activity, inventory data shapes service decisions, workforce planning responds to demand patterns, and frontline employees manage exceptions where systems meet reality.

In this model, employees are the human orchestration layer that makes the system work. They guide customers through digital journeys, translate stock and order information into action, coordinate between channels and apply judgment when automation reaches its limits. Their value lies in connecting what the system knows with what the customer needs.

This makes workforce design a retail operating-model decision. Leaders need to define which human capabilities are required to run the future store operating system: digital fluency, customer orchestration, exception handling, operational coordination and confidence in human-AI collaboration. Technology adoption will only scale when the workforce model is deliberately designed around these orchestration roles.

Strategic Workforce Planning must become orchestration planning

Strategic Workforce Planning becomes the management discipline that connects the future store operating system to store-level execution. It gives retailers visibility into the human capabilities needed to coordinate customers, tasks, systems and channels. In a market where customer expectations, technology and operating models are changing simultaneously, orchestration gaps will become business risks faster than vacancy numbers alone can reveal.

Several Dutch retailers already show the store operating system taking shape. Albert Heijn is embedding generative AI into its employee app to support store colleagues in daily work and customer interactions, while expanding AI across customer journeys and operations.[2] Jumbo shows how execution becomes more digital and data-driven through self-checkout, self-scanning, electronic shelf labels and e-fulfillment technology.[3] HEMA illustrates that even familiar high-street formats are becoming connected operating models, with store technology, cloud platforms, apps, electronic shelf labels and RFID linking shopfloor work to logistics, digital channels and customer-facing processes.[4]

The implication is not that stores need fewer people, but that frontline work must be designed differently. Employees become the point where system intelligence turns into customer value. Retailers that equip employees to interpret digital signals, act on operational insight and resolve cross-channel friction will convert technology investment into better execution, stronger customer experience and more resilient operations.

Skills define the human orchestration layer

As stores become operating systems, traditional job structures become too static. Cashiers should support self-checkout, sales assistants should coordinate online orders, and store managers should interpret workforce data, coach technology adoption and manage more complex operations. Skills provide the language for defining what the human orchestration layer must be able to do.

This is why leading retailers are moving from job-based to skills-based workforce models. Job titles describe where someone sits in the organization; skills reveal how they can help the store operating system perform. They provide a dynamic management language for customer orchestration, omnichannel fulfillment, exception handling, data interpretation and human-AI collaboration.

A skills-based approach connects business strategy to daily store reality by asking sharper questions: which orchestration capabilities do we need, which do we have and where must we develop? It helps retailers map existing capabilities, identify future-critical skills and build practical learning pathways that help employees coordinate more complex customer, operational and digital interactions.

This also improves visibility. By making orchestration skills explicit, retailers can identify strengths, anticipate gaps and create targeted development opportunities. Instead of relying only on external recruitment, they can grow the human orchestration layer already present in stores and support more agile planning and internal mobility.

Building the human orchestration layer

A skills-based strategy creates value only when it changes how work is planned, developed and led. The future store operating system cannot be staffed into existence; it must be orchestrated by the people already in stores. This requires practical learning, visible career pathways and managers who can translate digital capability into workforce confidence and customer value.

Upskilling and reskilling are both essential. Upskilling builds new capabilities within current or evolving roles, such as using digital systems, supporting self-service or interpreting workforce planning instructions. Reskilling helps employees move into different roles when the retail proposition or operating model changes more fundamentally. Successful retailers will treat learning as part of everyday work, not as a one-off intervention. Development should happen close to the work itself through short learning moments, coaching, peer support, feedback and opportunities to practice new tasks in real situations.

Employee experience becomes a strategic enabler of system performance. In Dutch retail, the question is not only whether employees are engaged, but whether they are equipped and supported to act as the human orchestration layer. New systems and processes create value only when people can use them confidently and understand how they improve service, coordination and decision-making.

What does this mean for retail leaders?

For retail leaders, the mandate is clear: design the store as an operating system, define the human orchestration layer and make adoption part of everyday execution.

- **Make orchestration capability a transformation KPI.** Track whether employees can translate digital tools and operational insight into better service, faster decisions and smoother store execution.
- **Map the human orchestration layer.** Identify the skills needed to run the future store operating system, including customer orchestration, omnichannel fulfillment, exception handling, data interpretation and human-AI collaboration.
- **Design technology adoption around store reality.** Involve store managers and frontline employees early, pilot tools in live workflows and embed learning into daily routines so technology strengthens the system instead of adding friction.

Conclusion

Dutch retail is entering a phase in which the store will be judged less as a physical format and more as a live operating system. Technology can automate tasks, generate insight and connect channels, but it cannot by itself create trust, resolve ambiguity or turn complexity into customer value. That is the role of the frontline workforce as the human orchestration layer. The retailers that win will be those that deliberately design this layer: using Strategic Workforce Planning to anticipate capability needs, skills-based models to build orchestration capacity and employee experience to make adoption part of everyday work. The future store will not be powered by technology alone. It will be orchestrated by people who know how to make technology perform.







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4.4 Point of view

Architecting the intelligent store in the AI era

Physical stores continue to hold a powerful place in retail. They fulfill customer needs that digital channels cannot entirely replace, such as in-person expert guidance, sensory experience, firsthand product discovery or immediate access. While digital commerce grows steadily, the role of the physical store has become increasingly critical. Tomorrow's store must bridge the convenience of digital shopping with the confidence, personalized service, and immediacy of physical retail.

For retailers in the Netherlands and around the world, this shift creates both an immense commercial opportunity and a complex design challenge. A single out-of-stock item, delayed click-and-collect order, or disconnected service interaction can now influence whether a shopper, or their agent, chooses one retailer or another. The strategic imperative is to design the store as a connected operating environment that can sense real-time floor conditions, understand what action is required, and execute workflows seamlessly across all store functions. Looking at the store as an operating system can turn this vision into reality.

Highlights

- **Unified commerce** eliminates channel friction and seamlessly connects data
- **AI orchestration** automates real-time store decisions
- **Scaled IoT** closes visibility gaps and boosts operational efficiency
- **Edge + cloud** create a resilient store infrastructure backbone
- **Human-centric design** remains the ultimate goal

The Store Operating System

Many retailers remain constrained by fragmented architecture. Critical systems that support customers, employees, inventory, and store operations are connected only in part, limiting visibility and responsiveness across the business. Digital channels and physical stores often evolve independently, with different teams, priorities, and data flows. As a result, stores may be digitally equipped, but they are not yet operating as a fully coordinated ecosystem.

The Store Operating System represents a paradigm shift by establishing a shared orchestration layer across physical and digital storefronts. It unites workforce, business processes, data streams, edge devices, AI capabilities, and infrastructure into one coordinated system. Every inventory movement, customer touchpoint, employee task, operational bottleneck and IoT signal feeds directly into the Store OS, which interprets these inputs and triggers real-time actions across the business.

Three Non-Negotiables for Building the Store OS

How do retailers move from siloed digital tools to an autonomous Store OS? Three baseline technical capabilities are non-negotiable:

Non-negotiable #1: Unified Commerce and Data Foundation

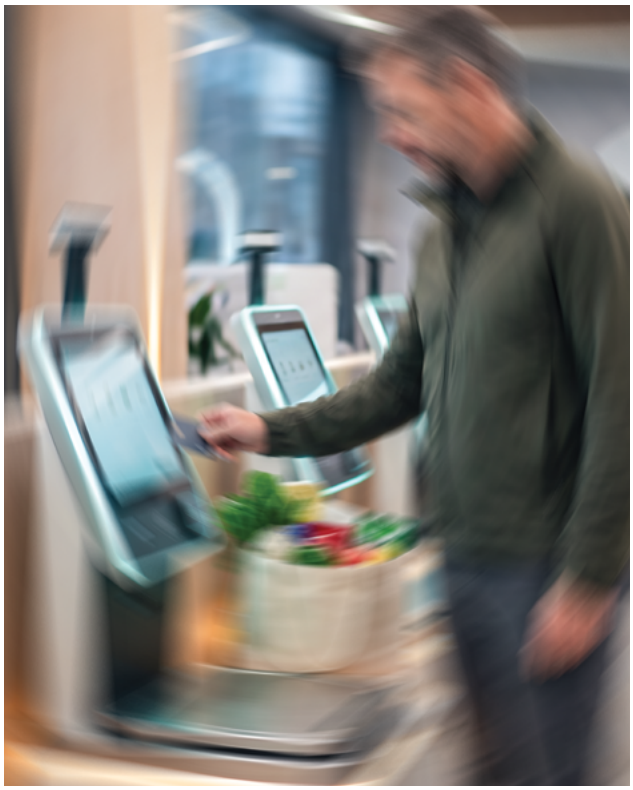
Unified commerce goes beyond traditional omnichannel retail by merging front-office and back-office pipelines. Physical stores, e-commerce, mobile apps, customer support, inventory systems, and loyalty programs sync to a shared, real-time database. For the customer, this architecture eliminates channel friction, allowing them to browse online, visit a store, collect an order, or return across channels seamlessly. For the employee, it creates operational clarity as frontline staff can view live product availability, loyalty status, purchase history, and fulfillment options on one interface, reducing system-switching and freeing time for customer engagement. For AI engines, unified data provides the clean and contextual inputs needed for automated, real-time store decisions.

- A.S. Watson's O+O strategy connects stores, digital channels, loyalty programs, and customer data across brands including Kruidvat, Trekpleister, and Superdrug. Customers engaging across the ecosystem spend three times more than store-only shoppers.[1,2]
- Manhattan Associates' 2026 benchmark shows only 7% of retailers have achieved unified commerce leadership, while 33% are still stuck in the Basic category. Leaders see nearly 2X growth rates and 1.5 times higher conversion, and better adaptability to rising costs.[3]

Non-negotiable #2: AI-Enabled Decisioning and Orchestration

Unified commerce requires active orchestration. AI in an intelligent retail environment must move beyond basic recommendation engines to automated, closed-loop execution. Consider an inventory scenario: AI agents can detect a likely shelf stockout from computer vision feeds, verify backroom stock, identify substitutions, generate a prioritized employee task, and update replenishment logs. The Store OS automates the operational response instead of relying on manual coordination. Employees can also use AI assistants to query product specs, compare options, and receive real-time, context-aware recommendations. Solutions such as Capgemini's Frontline AI for Retail signal the next generation of store operations, equipping employees with voice-first AI that delivers contextual insights, recommends actions, and streamlines task execution.[4]

- Walmart has reported that using AI workflow tools reduced shift planning time from 90 minutes to 30 minutes, demonstrating how AI can move beyond insights to actively orchestrate work on the shop floor.[5]
- According to the Capgemini Research Institute, 78% of retail executives are shifting toward outcome-driven customer experiences powered by AI[6], enabling agents to support decision-making and execution across customer journeys and store operations.



Non-negotiable #3: Scaled IoT Architecture

Unified commerce provides operational context, and AI determines optimal actions across the value chain, but scaled IoT gives the store awareness. Traditional physical retail suffers from expensive operational visibility gaps. Store teams may only discover empty shelves when customers flag them, while equipment issues become apparent only after they disrupt operations. Scaled IoT closes these visibility gaps and supports physical AI and predictive maintenance models. Such a framework bridges physical store mechanics with digital models using hardware endpoints such as RFID tags, smart sensors, computer vision nodes, robotics, and electronic shelf labels.

- HEMA's RFID rollout across more than 740 stores provides near real-time inventory visibility, allowing customers to check product availability online while enabling store employees to track stock more accurately and efficiently.[7]
- Carrefour's partnership with VusionGroup shows that, by combining AI, computer vision and digital shelf infrastructure, the retailer is improving inventory visibility, task prioritization and customer experience.[8] According to VusionGroup, automated shelf monitoring solutions can improve product availability by up to 5% while eliminating the need for manual checks.[9]

Implementation strategy

Once these foundations are in place, retailers can prioritize further investment based on digital maturity and business needs. At scale, intelligent stores require an infrastructure backbone that combines edge computing, hybrid cloud, and resilient connectivity. Edge processing supports real-time activities such as computer vision and employee tasking, while cloud platforms enable enterprise analytics, AI, forecasting, and supply chain optimization. Private 5G, Wi Fi 6E/7, and SD WAN ensure that an extensive network of connected devices and systems operates securely and reliably.

To minimize risk and maximize returns, retailers could adopt a phased implementation strategy. First, start with a high-impact business problem such as fulfillment delays or shrink, so the use case drives the roadmap. Second, break down data silos by building a unified commerce layer that connects supply, availability and transactions into one trusted ecosystem. Finally, modernize the store with priority infrastructure that is relevant and sustainable. Targeted pilots in high-value locations can validate ROI, build workforce capability, and create confidence before scaling the Store OS across the network.





Charting the Path Forward

The next era of Dutch retail will be led by organizations that convert in-store data into real-time execution across every channel. The intelligent store shifts physical locations beyond basic digital layers, toward an operating model where infrastructure, live data, AI workflows, and employees operate as one system. In this future ecosystem, the store serves as a physical extension of the digital channels, blending in-store insights with digital behavior.

Ultimately, the future of retail remains deeply human. Intelligent systems, connected infrastructure, and AI will become foundational, but their real value lies in how they elevate human experience. The focus should be on stores that use technology as an invisible layer that empowers people, strengthens relationships, and makes every interaction more relevant, seamless, and meaningful.



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4.5 Make-it-real

Zeeman

Zeeman is a family owned, low-cost retailer with 1,400 stores across eight different countries in Europe. In the past years, it underinvested in its store technology.

As a result, store operations relied heavily on manual activities, hardware and software were becoming outdated, and new initiatives to support employees and improve the customer experience could not be implemented. These limitations were hindering Zeeman's ability to fully realize its strategic ambitions.

Making It Real

Zeeman addressed this challenge by defining a future store vision from both an employee and customer perspective. With input from all disciplines and based on this vision, future-state employee and customer journeys were developed, providing clear direction for the required changes in store processes, technology and automation.

To bring this vision to life, Zeeman launched the Future Store Tech program, structured around two phases. The first phase, Fixing the Basics, focused on replacing and modernizing the complete stack of store technology, including new POS and back-office systems, infrastructure, handheld devices, cameras and payment solutions.

Cross-functional teams were established to drive the transformation, and the program was successfully rolled out across all stores over a two-year period. Some initiatives, including digital ways to perform cycle counting and receiving freight, have already been implemented. The second phase, Enabling the Business, is ready to commence. It will be focused on enabling the foreseen journeys, simplifying operations and improving customer experience.

Outcome

- A shared vision and future-state journeys for employees and customers were established.
- All 1,400 stores were equipped with a modernized technology and infrastructure foundation.
- Zeeman is ready to realize the next phases of their employee and customer experiences.

What's Next

With the foundational technology now in place, Zeeman can focus on simplifying and optimizing store operations, empowering employees with tools and enabling a better customer experience. This will create both more efficiency as well as increase sales. Zeeman stores are now ready for the future!



Chapter 5

Responsible value

5.1 – Introduction



For decades, organizations measured success through growth, margin, market share and shareholder value. In the next decade, they will increasingly be judged by something broader: the value they create for consumers, society and the ecosystems on which they depend.

Throughout this report, we have explored how consumer expectations are evolving, how AI is reshaping customer journeys, how resilient operations create competitive advantage and how stores are transforming into intelligent value platforms. Together, these developments redefine how value is created and delivered. Yet one critical question remains: how can this value be sustained over time? The answer lies in responsible value creation.

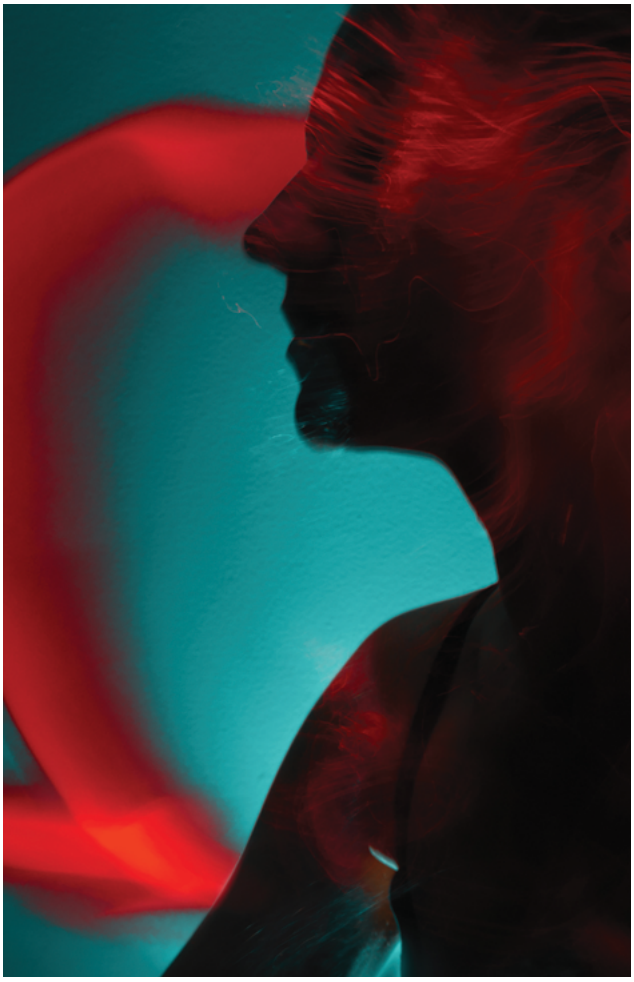
Organizations across the Consumer Products, Retail and Distribution sector face growing pressure from multiple directions. Consumers expect responsible behavior, transparency and fairness. Regulators are raising expectations around sustainability, traceability and reporting. Investors increasingly view resilience and sustainability as drivers of long-term performance. At the same time, organizations continue to operate in an environment shaped by intense competition, rising costs, geopolitical uncertainty and short-term financial expectations.

This creates a fundamental tension. Most leaders agree sustainability matters. Most organizations have ambitious commitments. Yet progress often moves slower than expected. Not because of a lack of intent, but because businesses must reconcile competing realities: consumers' willingness to pay, operational complexity, legacy systems, fragmented value chains and the economics of transformation. This challenge is explored further in Navigating the Sustainability Paradox, which examines why sustainability ambition often exceeds execution and what organizations can do to close the gap.

At the same time, the sustainability agenda itself is evolving. Resilience remains important, but resilience alone is no longer enough. Organizations can no longer focus only on recovering from disruption. Increasingly, they must redesign the systems in which they operate. This is especially visible in agriculture and food systems, where climate change, resource scarcity and ecosystem degradation require a broader transformation of the entire value chain. As explored in Common Sense Sustainability, creating sustainable outcomes requires collaboration across ecosystems, shared responsibility and a practical approach to long-term change.

Technology will play a fundamental role in making this transition possible. Digital platforms, advanced analytics and optimization capabilities are becoming critical enablers of transparency, collaboration and informed decision-making. An initiative described in this chapter demonstrates how data, modeling and ecosystem partnerships can help governments and organizations make evidence-based decisions that improve nutrition outcomes and create societal impact at scale.

The organizations that lead in the coming decade will not treat sustainability as a separate initiative, compliance exercise or communications agenda. They will embed it into how they design products, operate value chains, serve consumers and create growth. Responsible value, then, is about simultaneously creating commercial performance and societal impact.



Five key shifts toward responsible value

- **From responsibility to relevance**

  Sustainability creates impact when it strengthens the consumer proposition, rather than competing with it.

- **From resilience to regeneration**

  Organizations must move beyond absorbing disruption and actively improve the systems they depend on.

- **From individual action to ecosystems**

  The most significant challenges cannot be solved by individual organizations alone. They require collaboration across value chains.

- **From reporting to transparency**

  Trust increasingly depends on reliable data, traceability and the ability to substantiate claims.

- **From sustainability to responsible value**

  Long-term competitiveness requires balancing consumer value, commercial value and societal value.

The need to transform

Many sustainability initiatives struggle because they are positioned as trade-offs. Consumers are often asked to choose between affordability and sustainability. Businesses are often asked to choose between financial performance and environmental impact. In reality, neither choice is sustainable.

The next generation of leaders will focus on integration rather than compromise. They will connect sustainability to consumer needs, commercial objectives and operational performance. They will leverage technology to improve transparency, reduce waste, increase efficiency and strengthen resilience. They will collaborate across ecosystems rather than optimize individual organizations. And they will redefine success beyond short-term financial results alone.

Just as consumer value is no longer defined solely by price, organizational value is no longer defined solely by profit. The winners of the next decade will be those that recognize responsible value creation not as a constraint on growth, but as a new source of competitive advantage.

Conclusion

The Consumer Products, Retail and Distribution sector is entering a new era in which competitiveness, resilience and sustainability become increasingly interconnected. Organizations that succeed will move beyond viewing sustainability as a separate agenda. Instead, they will embed it within every aspect of how value is created, delivered and measured.

Responsible value is ultimately about creating outcomes that are commercially viable, socially relevant and environmentally sustainable. It is about building businesses that consumers trust, employees support, investors value and society welcomes.

The real challenge is making responsibility valuable enough for consumers to choose, scalable enough for businesses to grow, and impactful enough to create lasting change.

Further reading

A world in balance: The resilience reset

For a broader perspective on building resilience in an increasingly complex world, see A world in balance: The resilience reset, published by the Capgemini Research Institute. Learn how leaders are strengthening resilience, leveraging AI, and adapting to change in a complex environment while balancing innovation, sustainability, and business performance.







Ward de Vin

Business and Sustainability leader in Consumer Products & Retail

Ward is a seasoned business leader with more than 40 years of experience in technology, consulting, and transformation, primarily within the Consumer Products and Retail sector. At Capgemini, he has led the Consumer Products and Retail market, helping organizations across the food and non-food value chains harness technology to innovate, transform, and achieve sustainable growth. Combining commercial leadership with a strong sense of purpose, he is committed to turning sustainability challenges into practical solutions that create lasting value for business and society.



5.2 Point of view

Responsibility or value? Navigating the sustainability paradox

Consumers say sustainability matters. Yet at the checkout, price, convenience and quality often still win. This is one of the defining paradoxes for the consumer products, retail and distribution sector. Sustainability is no longer debated in principle. Executives recognize its strategic importance, regulators are raising expectations and companies are setting ambitious targets. But progress is often slower than anticipated.

The reason is that companies must reconcile two realities at once: consumers increasingly expect responsible choices, but they do not always reward them commercially. At the same time, businesses operate within systems that still favor short-term performance, fragmented value chains and operational efficiency over long-term transformation. The leadership challenge is finding ways to connect sustainability ambitions with what consumers need, want and are willing to choose.

Highlights

- Consumers expect sustainability but price and convenience still dominate decisions
- The green premium remains a key barrier to scaling sustainable products
- Transparency can build trust but requires reliable value-chain data
- Scope 3 and legacy assets make execution complex and capital-intensive
- Digital capabilities are essential to connect sustainability, value and consumer relevance

The consumer paradox: sustainability matters, but not at any cost

Consumer demand is often cited as a driver of sustainability. Surveys consistently indicate that consumers care about environmental and social impact, especially younger generations. In the consumer products and retail sector, sustainability increasingly influences brand perception, trust and loyalty.

However, actual purchasing behavior is more nuanced. Price sensitivity remains high, particularly in periods of economic uncertainty. Convenience, availability and product performance continue to play a decisive role. Sustainable alternatives often carry higher costs due to materials, sourcing, production methods or certification requirements. This creates the intention-action gap: what consumers say they value does not always translate into what they buy.

For companies, this creates a commercial dilemma. Passing higher costs on to consumers can reduce competitiveness. Absorbing them can put pressure on margins. Moving too slowly can damage relevance and trust. Moving too fast can create cost and execution risks.

The task for leadership is clear: sustainability cannot be positioned as a separate premium. It must be integrated into the overall value proposition. The winning formula is not "sustainable or affordable," but sustainable, attractive, available and economically viable.

This is where the true sustainability paradox begins.

From responsibility to relevance: making sustainability part of the core proposition

For many years, sustainability was treated as a compliance requirement or reputational topic. This mindset is changing quickly. Regulatory developments such as the EU Packaging and Packaging Waste Regulation and the EU Deforestation Regulation are redefining expectations around transparency, traceability and accountability. Many companies have committed to ambitious climate and ESG targets.

Yet regulation and targets alone do not create consumer value. The real challenge is to translate sustainability into propositions that customers recognize as better, easier or more relevant.

This requires a shift in how companies think about responsible growth. Sustainability must be embedded into product design, packaging, sourcing, pricing, supply chain choices and customer experience. It must support the reasons consumers already buy: quality, reliability, affordability, availability and trust.

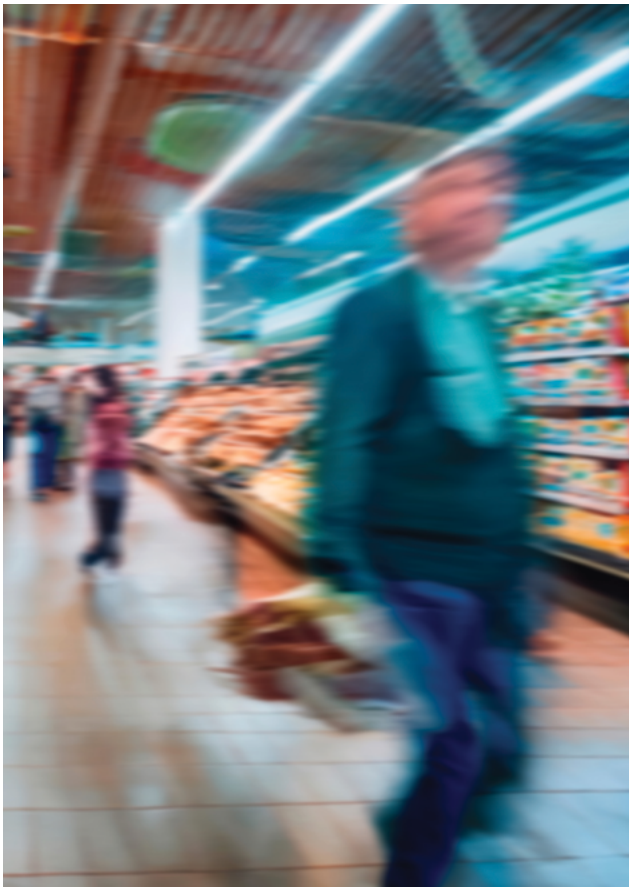
For executive teams, this means sustainability has to be connected to category strategy, brand positioning, innovation portfolios and commercial decision-making.

The green premium: when responsible choices meet commercial reality

One of the most persistent barriers to sustainable growth is the green premium. More sustainable materials, responsible sourcing, circular packaging or lower-carbon production methods often cost more, at least in the short term.

This creates a difficult equation for consumer-facing companies. If the price premium is too visible, adoption may remain limited. If the company absorbs the cost, margins come under pressure. If the organization delays action, it risks falling behind regulation, consumer expectations and competitors.

Leading companies are addressing this by avoiding a narrow "pay more for sustainability" proposition. Instead, they integrate sustainability into broader sources of value. Examples include better product quality, reduced waste, refill convenience, product durability, healthier ingredients, lower total cost of ownership or stronger brand trust. In other words, sustainability becomes scalable when it is not presented as a trade-off. It becomes scalable when it strengthens the consumer proposition.



Transparency builds trust, but only if the data is reliable

Transparency is becoming a defining feature of the consumer products, retail and distribution market. Consumers, regulators and investors increasingly expect insight into product origin, composition, environmental impact and supply chain practices.

For companies that get it right, transparency can create trust and differentiation. It can help substantiate claims, support premium positioning and strengthen loyalty. Digital Product Passports and end-to-end data integration are emerging as important enablers.

However, transparency also exposes complexity. For many organizations, most of the environmental impact sits outside their direct operations, in Scope 3 emissions across suppliers, logistics, product use and end-of-life. Data is often incomplete, inconsistent or difficult to verify. This creates a critical bottleneck: companies cannot credibly communicate what they cannot reliably measure.

On top of this, there is a growing fear of greenwashing. As regulatory and public scrutiny increases, companies are becoming more cautious in their sustainability communication. Some may even under-communicate progress to avoid reputational or legal risks. The answer, though, should not be less transparency, but better data, stronger governance and clearer links between claims, evidence and consumer value.

Decarbonizing the value chain: where ambition meets operational complexity

If companies want to offer sustainable choices at scale, they need to transform the systems behind the product. In consumer products and retail, decarbonization is rarely limited to direct operations. It depends on suppliers, materials, logistics networks, manufacturing processes, packaging choices and consumer behavior.

This is why Scope 3 is such a significant challenge. Companies must influence actors beyond their direct control, often across geographies, regulatory environments and levels of digital maturity.

At the same time, legacy assets create inertia. Manufacturing facilities, logistics infrastructure and production systems represent major capital investments. Replacing or redesigning them before the end of their economic life can create stranded value and short-term financial pressure.

This explains why execution often lags ambition. Transformation follows the pace of capital cycles, operating models and partner readiness, not only the urgency of climate targets.

However, the case for action is strengthening. Climate-related disruptions, resource scarcity and geopolitical volatility are increasing supply chain vulnerability. Decarbonization is becoming a driver of resilience, continuity and long-term cost stability.

Circularity: from volume growth to lifetime value

Circular business models offer a powerful route to connect sustainability with consumer relevance. Reuse, repair, refill, resale, refurbishment and product-as-a-service models can reduce resource dependency while creating new forms of customer engagement.

For consumers, circularity can offer convenience, affordability, access and reduced waste. For companies, it can unlock new revenue streams, increase customer lifetime value and reduce exposure to material volatility. But circularity also challenges traditional business economics. It requires product redesign, reverse logistics, new partnerships, new data flows and often new revenue recognition models. Financial returns may be realized over a longer period, while costs are incurred upfront.

This connects directly to the broader sustainability paradox. Circularity creates long-term value, but companies are often measured on short-term performance. Organizations that scale circularity successfully will be those that move from selling more volume to creating more value over time.

Digital as the connector between consumer, value chain and sustainability

Across all these challenges, digital capabilities are the critical enabler. To connect sustainability ambition with consumer value, organizations need granular and reliable data across products, suppliers, materials, logistics and customer interactions. They need to integrate sustainability metrics into core systems, not only reporting tools. They need analytics to optimize demand forecasting, reduce waste, improve sourcing decisions and support circular models.

Digital platforms also enable ecosystem collaboration. They connect suppliers, manufacturers, logistics providers, retailers and, increasingly, consumers. However, many organizations are still constrained by legacy IT landscapes that lack the flexibility, interoperability and data quality required. Sustainability transformation, then, is closely connected to digital transformation.

For board-level leaders, this is an important point: sustainability is a brand, compliance and supply chain issue, but it is a data and technology issue as well. Without digital foundations, companies cannot scale transparency, circularity or decarbonization in a commercially viable way.

From sustainable ambition to consumer-led value creation

The consumer products, retail and distribution sector is entering a new phase. Sustainability is becoming a test of whether companies can create value in a market where expectations are rising, margins are pressured and systems are difficult to change.

Many customers care about sustainability. The question is whether companies can make sustainable choices relevant, affordable, trusted and easy to adopt. This requires a system-level response:

- Align sustainability ambition with consumer needs and category strategy
- Reduce the green premium through design, scale and operational efficiency
- Build trustworthy transparency through data and governance
- Collaborate across the value chain to address Scope 3 impact
- Use digital capabilities to connect sustainability with business performance
- Redefine success beyond short-term financial metrics alone

Ultimately, the companies that lead will be those that stop treating sustainability as a separate agenda. They will connect it to the everyday choices consumers make, the systems that deliver those choices and the financial logic that determines whether they scale. The ideal outcome: responsibility that is valuable enough for consumers to choose, and scalable enough for businesses to grow.



Pieter van den Herik

Sustainability Business Developer

Pieter van den Herik has 20 years of experience in the field of sustainability in business. Both as a consultant and in management roles, Pieter has worked with large companies and leading SMEs to leverage sustainability as a business opportunity. Pieter now works as sustainability business developer at Capgemini in the Netherlands.

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5.3 Point of view

Common sense sustainability: transforming agriculture for the future

Agriculture stands at a crossroads. Over the past decades, the sector has achieved unprecedented efficiency through standardization and specialization. However, this progress has come at a cost - declining biodiversity, soil degradation, water pollution, and reduced ecosystem resilience. As these pressures intensify, the traditional agricultural model is increasingly showing its limits. Declining yields in industrial agriculture can no longer be ignored.

At the same time, the challenge ahead is growing. By 2050, the global population is expected to reach approximately 9.5 billion people, significantly increasing demand for food, feed, and bio-based materials. And that's not all; a growing number of people are looking for the convenience and the instant gratification of fast food options. This 'bad food system' in turn leads to widespread health problems, with obesity as its most worrying symptom. Ozempic and comparable products offer relief, but do nothing to promote a healthier, more sustainable diet. On top of that, Ozempic leads to a declining demand in food. One could easily say the Ozempic crisis is negatively impacting the out-of-home market and retail directly.

All in all, there's a complex knot to untangle. And along the way, we have to deal with climate volatility, resource scarcity, wars and societal expectations for sustainability. The question is no longer whether agriculture must transform, but how quickly and effectively this transformation can take place.[1]

Highlights

- The “hidden costs” of agriculture are increasingly impacting both society and the long-term viability of the sector itself
- Farmers, agribusinesses, and policy makers must move from reactive recovery to a proactive system based on low input, regenerative agriculture
- This requires stronger collaboration, shared risk and regulation that incentivizes sustainable practices
- Digital technologies can empower farmers by optimizing decision-making, enhancing collaboration, driving transparency across the supply chain and accelerating sustainable practices at scale

From resilience to transformation

In recent years, “resilience” has become a central concept in agriculture. Traditionally defined as the ability to recover from disruptions, resilience is no longer sufficient. Returning to the previous state after a shock is not an option when that state itself is unsustainable. Droughts, fires and other climate crises all over the world are destroying nature for the next five generations and impacting water and climate buffers.

A systemic transformation is needed. A revolution of the agricultural and agro-industrial model that enables adaptation to constant change. This requires agility and locality. The ability to anticipate risks, respond to uncertainties, and continuously improve practices.

Farmers, agribusinesses, and policy makers must move from reactive recovery to proactive redesign of the system. A system based on low input, regenerative agriculture: requiring no fossil fuels and no mining, based on the idea that agriculture can actually help repair ecosystems, and designed around optimal use of water.

The limits of the current model

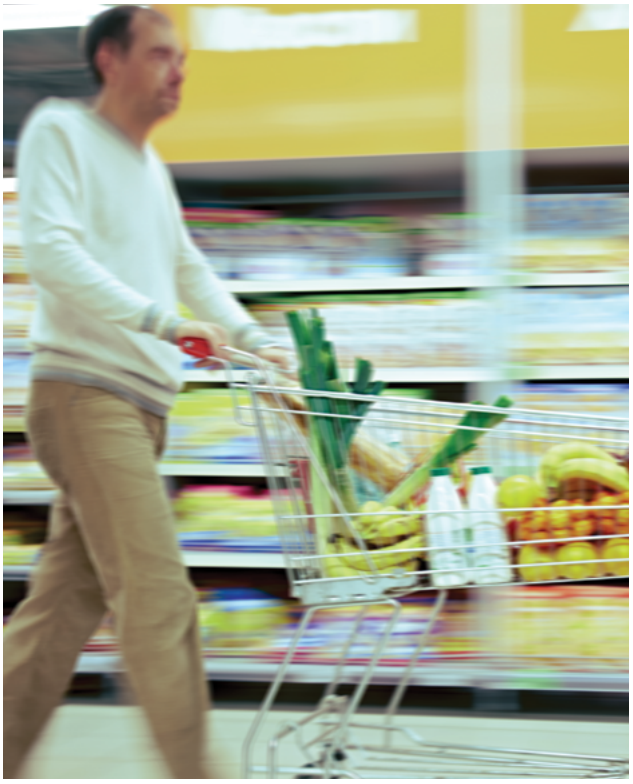
The current agricultural model is heavily characterized by specialization, standardization and scale. While this has improved productivity, it has also resulted in unintended consequences:

- Reduced genetic diversity, increasing vulnerability to diseases and climate stress
- Ecosystem degradation, including soil erosion and biodiversity loss
- Dependence on external inputs, such as fertilizers and pesticides
- Environmental externalities, often not reflected in market prices

These “hidden costs” are increasingly impacting both society and the long-term viability of the sector itself. As ecosystems weaken, agriculture loses the natural services it depends on: fertile soil, clean water, and pollination.

Scaling systemic innovation beyond the field

Innovation in agriculture is not new. However, many promising practices, such as regenerative farming, precision agriculture, and alternative crop systems, remain confined to small-scale pilots or experimental plots. This is a result of Big Agriculture’s successful lobby against investing in sustainability. For them, the farmer is the business model. Focusing on sustainability would result in less dependency on external inputs, pesticides, etcetera – Big Agriculture’s main sources of income. Investing in sustainability would mean cannibalizing their license to operate.



[1]This article presents the highlights of our recent whitepaper ‘Common Sense Sustainability: Transforming Agriculture for the Future’. You can download it here.

In essence, a big restructuring is required. The positive side is that this will involve a lot of new jobs that never existed before.

One of the other key barriers to scaling innovation is risk. Farmers often bear the financial and operational risks of adopting new practices, while the benefits are shared across the value chain. Crop yields may be uncertain at first, the knowledge required isn't always available and will have to be gained as time goes by – and investors may not be willing or able to accept that ROI may be a long-term proposition at best. As a result, adoption rates remain slow. To overcome this, a broader ecosystem approach is required:

- Stronger collaboration across the value chain, including processors, retailers, and input providers
- Supportive policies and regulatory frameworks that incentivize sustainable practices
- Advisory and knowledge-sharing networks to guide farmers through transitions
- Shared risk models, ensuring that the burden of innovation is not placed solely on farmers

Only through collective action in farm to fork, from farmers to retailer, can agricultural innovation move from isolated success stories to systemic impact.

The role of digitalization

Digital technologies are a critical enabler of this transformation. They provide the tools to connect stakeholders, optimize decisions, and accelerate the adoption of sustainable practices at scale. Key contributions of digitalization include:

- **Data-driven decision-making**, improving yields while reducing environmental impact
- **Adding the True-Price** to the equation, measuring real time impact
- **End-to-end transparency** across supply chains, enabling traceability and accountability
- **Advanced analytics and modeling**, allowing farmers to anticipate weather events and optimize resource use
- **Platform-based collaboration**, connecting farmers with advisors, suppliers, and markets

Digitalization does not replace traditional agricultural knowledge. The human factor always stays part of the loop. Rather, digital technologies are a critical enabler of the transformation that's needed. They help farmers make better decisions and track and prove progress. Soil data, satellite imagery, farm management systems, and supply-chain platforms can support more targeted input use,



monitor soil organic matter and biodiversity indicators, and make regenerative outcomes visible to buyers, financiers, and policymakers alike. By combining data insights with agronomic expertise to increase the sector's overall, positive impact on sustainability, the sector can transition toward more resilient and adaptive systems.

A call for common sense sustainability

The path forward requires a pragmatic approach: 'common sense sustainability'. This means balancing economic viability with environmental stewardship and societal expectations. It is not about radical disruption, but about making smarter, more integrated decisions across the value chain. For industry leaders, this translates into several priorities:

- Showing leadership can act as a role model, and take the right actions not only based on short-term economics but on a long-term vision for creating a viable planet
- Embedding sustainability into core business strategies, rather than treating it as a compliance topic
- Investing in digital capabilities to enable transparency, efficiency, and innovation
- Building partnerships across the ecosystem to share knowledge, risks, and rewards
- Supporting farmers as key agents of change in the transition and see them as full-time partners, and not just as a business model for input suppliers and purchasing departments

Conclusion

Since its inception more than 10,000 years ago, agriculture has always been a sector defined by adaptation. Today, the pace and scale of change required are greater than ever before due to the human contribution toward accelerating climate change. By combining technological innovation with ecosystem collaboration and practical sustainability principles, the agri-food sector can transform itself to meet future demands and even be a net positive contributor to climate change mitigation.

The opportunity is clear: to move beyond resilience and create a system that is not only capable of withstanding shocks, but designed to thrive in a rapidly changing world - and to regenerate the landscape.



Jacko Obels

Global lead Agriculture Capgemini

Jacko works with leaders in agriculture to uncover growth opportunities and deliver exceptional innovations and experiences. He specializes in business applications (ERP-SAP) integration, connecting strategy to data, technology, and AI by fusing art and science together. Jacko is member off the Global CPRD community within Capgemini and acts as the SPOC of Agriculture and Sustainability. He knows sustainability and climate changes are the most important drivers in the agriculture industry and that motivates him to challenge the status-quo of the current industrial way of Farming that already has lost his license to operate. There is more fun in designing resilient systems that serve nature, biodiversity, and bring more positivity and joy to how people experience the world around them.



5.4 Make-it-real

Global food project

5 years ago, Capgemini and the University of Tilburg joined forces. The goal: to assist an international governing body in creating a platform that helps governments and other organizations to calculate the effect of policy on the cost and environmental impact of diets. The result was a system that generates so-called Fill the Nutrient Gap' analyses. Through the (online) platform and its analyses, governments around the world get an evidence-based support system for the design and implementation of food provision policies.

The first version was heavily CSV-driven. Since then, the platform has seen constant development, working toward a more user-friendly, flexible user interface. Over the last year, version 3.0 took shape. It had to meet the challenge we set: *how can we create an accessible platform that fulfills the needs of NGOs, governments and universities around the world?*

Making it real

We had to start with a clear roadmap. What did we want the platform to be? The first obstacle was clear. Although the platform at that point was already a huge improvement over its predecessor, a lot of the data was still uploaded through CSV templates that were filled in by hand. The platform was only available in English. And we aimed to add multi-objective optimization; a feature that produces a range of diets that represent a workable trade-off between metrics like cost, carbon gas emissions, and land use (among many others).

We worked on these issues through the past 6 months. We involved the help of translators and willing colleagues to translate the platform in Arabic, English, French, Portuguese, Russian, and Spanish. We implemented a front-end plugin to translate the whole platform at the push of a button. An intern was put on the task to find the easiest way to interpret all the data points required for multi-optimization and provide a way to rank them on how workable a specific trade-off would be related to

its objective metrics. Together with co-workers from the governing body, we worked on improving the speed of the optimization platform. In that way, we made sure that powerful clusters could be invoked to run the algorithms and ensure quick results, while reducing costs (running a workload for longer on a slower machine costs more than running it quickly on a powerful one).

With this clear roadmap, with the right people for each job on hand, with the help of a lot of volunteers and after months of hard work, we were able to release Version 3.0 of the platform last Summer.

What Changed

- Created a platform that is accessible and powerful, with features including multi-objective optimization, a multilingual user interface, user guides and video tutorials, and new interactive visualizations for exploring analysis results.
- Readied the platform to accept hundreds of users from around the world.
- With analyses done in over 30 countries, the platform is helping create policy that could potentially help millions of people that are at risk of malnutrition and hunger.

What's next

The platform is now being discussed with organizations around the world that want to calculate the effect of structural policies to help people to feed themselves. Now it's time to make the whole world aware of this initiative, and to find new opportunities to feed the world.







Colophon

This edition of Redefining value was made possible through the contributions of:

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About Capgemini

Capgemini is the business transformation partner for enterprises in the age of AI. We help organsations imagine and build an intelligent, sustainable future, combining AI, technology and human ingenuity to transform how they operate, innovate and grow. With unique end-to-end capabilities spanning strategy, technology, engineering and intelligent operations, we bring together deep industry expertise and market-leading capabilities in AI, cloud and data to turn ambition into measurable business outcomes at scale. Supported by a robust ecosystem of partners and nearly 60 years of expertise, Capgemini is a responsible and diverse global organization of over 410,000 team members in more than 50 countries. The Group reported 2025 revenues of €22.5 billion.

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