Everest Group®

Everest Group CPG Digital Services PEAK Matrix® Assessment 2026

Focus on Accenture
October 2026

PEAK MATRIX®

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Introduction / Research background

In 2026, the global Consumer Packaged Goods (CPG) industry continues to navigate margin pressure, demand and supply chain volatility, input cost and tariff uncertainty, value-conscious consumer behavior, and increasingly complex routes to market. CPG enterprises are prioritizing investments in profitable growth, operational efficiency, supply chain resilience, and stronger consumer engagement, with AI, automation, real-time analytics, and modern data foundations becoming central to transformation across Revenue Growth Management (RGM), planning, manufacturing, supply chain, and commerce.

The CPG digital services market is also evolving, as providers expand CPG-specific IP and accelerators; AI-augmented delivery capabilities; agentic AI propositions; cloud, ERP, and data modernization capabilities; and ecosystem partnerships. Buyers are increasingly seeking partners that combine CPG domain depth, proven execution, cost efficiency, and measurable business impact, while supporting priorities such as AI-led RGM, autonomous supply chains, smart manufacturing, and connected consumer engagement.

In the report, we present an assessment of 32 service providers featured on the CPG Digital Services PEAK Matrix® Assessment 2026. The assessment is based on Everest Group's annual RFI process for CY2025 and H1 2026, interactions with leading service providers, client reference checks, and ongoing analysis of the CPG digital services market.

The full report includes the profiles of the following 32 leading CPG service providers featured on the CPG Digital Services PEAK Matrix:

- **Leaders:** Accenture, Capgemini, Cognizant, Deloitte, HCLTech, IBM, and Tata Consultancy Services (TCS)
- **Major Contenders:** Atos, Ciklum, CI&T, Coforge, EXL, EY, Genpact, HGS, Infosys, Kyndryl, LTM, Nagarro, NTT DATA, Persistent Systems, PwC, Sutherland, Tech Mahindra, Wipro, Xebia, and Zensar
- **Aspirants:** Happiest Minds, Perficient, Sonata Software, UST, and Xoriant

Scope of this report

Geography: global

Industry: CPG

Services: digital services

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Scope of the evaluation

This assessment focuses on the CPG industry

Retail services

- Procurement
- Merchandising
- Supply chain management
- In-store operations
- Unified commerce
- Customer growth and engagement
- Retail media and data monetization

Focus of research

CPG services

- Procurement
- Supply chain management
- Product development and manufacturing
- Commercial execution and RGM
- Digital commerce
- Customer growth and engagement

- The evaluation assesses service providers offering IT, business process, and engineering services to CPG enterprises. It benchmarks capabilities across the value chain. However, the scope is focused on CPG-specific services and includes both horizontal enablers and verticalized offerings. The assessment does not include adjacent industries such as automotive, chemicals, heavy manufacturing, industrial, and retail

- Enterprises are navigating volatility driven by technological disruption and evolving market dynamics. This evaluation helps identify partners that align with their transformation agenda and enable informed, strategic sourcing decisions

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CPG value chain

[NOT EXHAUSTIVE]

Assessment scope: End-to-end value-chain services aligned to the core operating and commercial processes of CPG enterprises

Procurement

- Raw material and packaging sourcing
- Supplier relationship and performance management
- Cost optimization and risk mitigation
- Ethical, sustainable, and compliant sourcing

Supply chain management

- Demand forecasting and demand sensing
- Integrated business planning (IBP/S&OP)
- Inventory and warehouse management
- Transportation, logistics, and distribution

Product development and manufacturing

- New Product Development (NPD)
- Packaging design, testing, and optimization
- Production planning and scheduling
- Quality control and assurance

Commercial execution and Revenue Growth Management (RGM)

- Trade promotion planning and execution
- Revenue growth management (pricing, pack architecture, mix)
- Distributor and retailer management
- Trade-spend governance, deductions, and claims management
- Sales forecasting and performance analytics

Digital commerce

- Direct-to-Consumer (DTC) commerce management
- Marketplace and retailer digital channel execution
- Digital shelf analytics and content syndication
- Brand activation and performance marketing

Customer growth and engagement

- CRM for direct and indirect channels
- Consumer loyalty and engagement programs
- Social listening and community management
- Social media content creation
- Consumer insights and feedback analytics

Data, Analytics, and AI (DAAI)

Cybersecurity

Environmental, Social, and Governance (ESG)

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CPG ecosystem – definitions and example logos

[NOT EXHAUSTIVE]



Food and beverages
Includes branded packaged food and non-alcoholic beverage manufacturers

Coca-Cola · DANONE ONE PLANET. ONE HEALTH · Mondelēz International · Nestlé · PEPSICO



Agribusiness
Includes integrated agribusiness firms involved in sourcing, processing, and supplying agricultural commodities and ingredients

ADM · BUNGE · Cargill · Olam · wilmar



Alcoholic beverages and tobacco
Includes manufacturers and brand owners of alcoholic beverages and tobacco products

ABInBev · BAT A BETTER TOMORROW · DIAGEO · Pernod Ricard · PMI



Apparel, footwear, and lifestyle brands
Includes brand-led manufacturers of apparel, footwear, and lifestyle products

LEVI STRAUSS & CO. · lululemon · patagonia · THE NORTH FACE



Personal care, beauty, and cosmetics
Includes manufacturers of skincare, cosmetics, grooming, fragrance, and personal hygiene products

COTY · ESTĒE LAUDER COMPANIES · L'ORÉAL · SHISEIDO · Unilever



Consumer health and wellness
Includes manufacturers of over-the-counter (OTC), vitamins and supplements (VMS), wellness, and consumer healthcare products

BAYER · GSK · Johnson & Johnson · sanofi



Home care
Includes manufacturers of household cleaning, fabric care, home maintenance, and related consumer products

CLOROX · Henkel · P&G · reckitt · SC Johnson



Consumer electronics and durables
Includes CPG brands specializing in electronics, appliances, and durable goods for home and personal use

Haier · Panasonic · PHILIPS · SAMSUNG

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CPG Digital Services PEAK Matrix® characteristics

Leaders

Accenture, Capgemini, Cognizant, Deloitte, HCLTech, IBM, and TCS

- Leaders demonstrate strong end-to-end CPG digital transformation capabilities across consulting, technology, engineering, and managed services, with deep coverage across procurement, planning, product development and manufacturing, supply chain, commercial execution and RGM, digital commerce, consumer engagement, data and AI, cloud, and enterprise platforms
- They have mature CPG-specific IP, accelerators, and industry solutions, spanning trade promotion and pricing, demand and supply planning, smart manufacturing, product innovation, traceability, D2C, and agentic AI, supported by strong partnerships across hyperscalers, enterprise platforms, supply chain technologies, commerce, and data ecosystems
- Leaders are best positioned for large, multi-tower and multi-country transformation programs, considering their global delivery scale, broad CPG subvertical experience, strong client portfolios, and ability to combine business-led transformation with large-scale implementation and run-the-business support

Major Contenders

Atos, Ciklum, CI&T, Coforge, EXL, EY, Genpact, HGS, Infosys, Kyndryl, LTM, Nagarro, NTT DATA, Persistent Systems, PwC, Sutherland, Tech Mahindra, Wipro, Xebia, and Zensar

- Major Contenders demonstrate credible CPG digital services capabilities, often differentiated by specific strengths in data and AI, supply chain and manufacturing, RGM and trade promotion, digital commerce and CX, cloud and infrastructure, enterprise platforms, digital engineering, or business process operations
- They are accelerating CPG verticalization through industry-focused accelerators, agentic AI propositions, acquisitions, and ecosystem partnerships. However, their portfolios may be narrower than Leaders in areas such as consulting depth, global scale, full value-chain coverage, or scaled production maturity across newer solutions
- Many Major Contenders are well suited for focused transformation programs, specialist modernization initiatives, and targeted functional scopes, although buyers should validate end-to-end ownership, regional delivery depth, client and subvertical diversification, and repeatable proof points across complex, multi-market CPG engagements

Aspirants

Happiest Minds, Perficient, Sonata Software, UST, and Xoriant

- Aspirants have demonstrated capabilities in focused CPG digital services engagements, typically centered on application and platform modernization, data and AI, digital commerce, supply chain, product engineering, enterprise platforms, or managed support services
- They often differentiate through niche technical expertise, flexible delivery models, cost competitiveness, and rapid execution, but may have smaller CPG practices, concentrated client portfolios, and comparatively limited CPG-specific IP, domain consulting, business process breadth, or partner-led solutions
- Aspirants may be suitable for modular transformation, specialist engineering, and well-defined workstreams, while buyers should assess their ability to scale across regions, manage complex multi-tower programs, and support broader CPG priorities such as RGM, product innovation, manufacturing transformation, and end-to-end managed operations

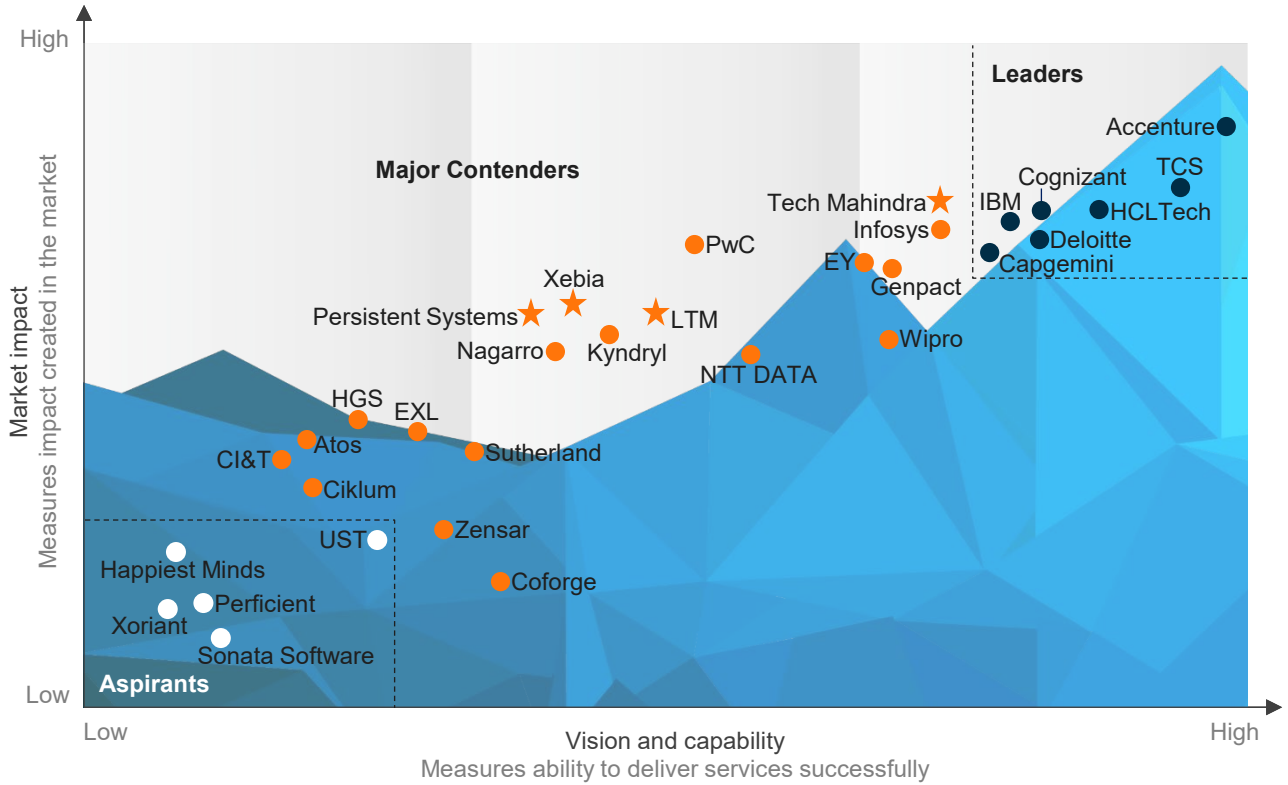
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Everest Group PEAK Matrix®

CPG Digital Services PEAK Matrix® Assessment 2026 | Accenture is positioned as a Leader

Everest Group CPG Digital Services PEAK Matrix® Assessment 2026[1,2,3]

- Leaders
- Major Contenders
- Aspirants
- ☆ Star Performers



1 In this study, assessments for Accenture, Capgemini, CI&T, Coforge, Ciklum, Deloitte, EY, Genpact, Happiest Minds, IBM, Infosys, Nagarro, NTT DATA, and PwC exclude provider inputs and are based on Everest Group's proprietary Transaction Intelligence (TI) database, provider public disclosures, and Everest Group's interactions with CPG buyers
2 Analysis for Persistent Systems and Nagarro are based on capabilities before their announced merger offer
3 Analysis for Happiest Minds is based on capabilities before its announced merger offer with ITC Infotech
Source: Everest Group (2026)

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Accenture

Everest Group assessment – Leader

Measure of capability: Low High

Market impact				Vision and capability				
Market adoption	Portfolio mix	Value delivered	Overall	Vision and strategy	Scope of services offered	Innovation and investments	Delivery footprint	Overall
								

Strengths

- Accenture's CPG transformation capabilities span consumer and customer engagement, sales and RGM, marketing, product innovation, procurement, supply chain and logistics, manufacturing, data and AI, and digital core modernization
- It has strengthened its CPG growth and decision-intelligence proposition through industry-specific AI and targeted ecosystem investments, including AI Refinery for Industry's multi-agent RGM solution, Aaru's agentic consumer prediction engine for new product development, marketing and customer strategy, and Alembic's causal AI platform for linking marketing investments to revenue outcomes
- It has deepened its next-generation manufacturing and supply chain proposition through physical AI and digital twins, combining Physical AI Orchestrator, NVIDIA Omniverse, and AI Refinery agents to simulate and optimize factories and warehouses. It has also demonstrated strong traction to scale advanced AI into core CPG operations
- Buyers highlight Accenture's technology competency, change management skills, flexibility, proactiveness, timeliness, and strong relationship management as core strengths for Accenture

Limitations

- Accenture appears strongly oriented toward large and mega enterprise transformation programs, which may require smaller and mid-sized CPG enterprises to assess the level of hands-on senior leadership attention, delivery flexibility, and tailored engagement support they would receive
- Buyers cite organizational complexity and talent attrition, along with the need to improve proactiveness, priority alignment, timely escalation, responsiveness and accountability, and technology execution as key areas of improvement for Accenture

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Market trends

AI adoption, supply chain volatility, legacy technology modernization, and omnichannel growth are reshaping enterprise priorities, creating opportunities for providers to drive productivity, resilience, and cost optimization

Market size and growth

- The CPG digital services market is estimated at ~US$ 38-40 billion in 2026, having grown by approximately 3.7% year over year, and is expected to grow at a CAGR of 3-5% during the 2027-29 period
- CPG companies are accelerating investments in AI-led planning and RGM, D2C and omnichannel engagement, retail media, smart manufacturing, autonomous supply chains, data platforms, and legacy/ERP modernization
- CPG engagements are increasingly shifting toward AI-first, outcome-linked transformation, with enterprises favoring rapid proofs of value, targeted modernization, reusable industry IP, and scalable managed services over traditional FTE-led delivery models

Key drivers

AI, gen AI, and agentic AI adoption	CPG enterprises seek domain-led AI across RGM, promotions, planning, and consumer insights, increasing reliance on providers as technology evolves faster than internal skills.
Supply chain volatility and the need for greater resilience	Volatile demand, retailer dependencies, and inventory pressures are driving the outsourcing of forecasting, planning, inventory optimization, control towers, and logistics analytics.
Legacy technology and fragmented data environments	Fragmented ERP, product, customer, and supply chain data is driving the outsourcing of ERP/cloud modernization, data integration, Master Data Management (MDM), and AI-ready platforms across CPG operations.
Omnichannel expansion and demand for personalization	CPG companies need providers to integrate commerce, customer data, marketing, personalization, loyalty, and service across channels, as D2C and retailer ecosystems become more complex.

Challenges

Evolving customer expectations and omnichannel complexity	Enterprises are struggling to deliver consistent, personalized experiences across physical and digital channels, while managing fragmented journeys and rising customer expectations.
Talent, skills, and organizational readiness	CPG enterprises face AI/digital talent shortages, upskilling needs, organizational silos, and change management challenges, limiting workforce readiness and slowing AI-led transformation.
Margin and profitability pressure	Enterprises are under a growing pressure to protect margins amid rising operating costs, pricing complexity, and higher cost-to-serve, while sustaining growth.
Cybersecurity, data privacy, and operational resilience	CPG enterprises face growing cyber, data privacy, and third-party risks as connected platforms, consumer data, and AI adoption expand.

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Service provider landscape analysis

The CPG outsourcing market remains highly fragmented, with Accenture holding the highest market share while several mid-tier and specialist providers are experiencing strong revenue growth

Market share analysis of the providers[1]

June 2026 (TTM[2]); percentage of the overall market share of CPG digital services

100%[3] = US$19-20 billion



1 Providers are listed alphabetically within each range
2 Trailing 12 Months (TTM)
3 The analysis is based on the above mentioned 32 service providers

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Key buyer considerations

Enterprises favor providers that combine deep industry expertise and proven delivery experience with established relationships, competitive commercials, and strong technology ecosystems

Key sourcing criteria

High

Priority

Low

Deep industry and domain expertise

Buyers prioritize providers with a strong understanding of CPG, RGM, supply chain, manufacturing, commerce, and consumer engagement, and the ability to translate this into relevant solutions.

Proven experience in delivering similar engagements

Buyers assess experience based on comparable CPG transformation programs, including scale, complexity, business processes covered, and measurable outcomes delivered.

Established provider relationship and trust

Prior experience strengthens confidence in delivery quality, governance, business continuity, and the provider's understanding of the enterprise's brands, markets, and operating environment.

Competitive pricing and commercial models

Buyers seek competitive and transparent commercials while balancing cost with domain expertise, automation-led productivity, value, and outcome alignment.

Strong technology ecosystem partnerships

Partnerships across hyperscalers, ERP, data, commerce, planning, and AI platforms strengthen solution breadth and accelerate integrated CPG transformation.

Summary analysis

Enterprise sourcing priorities in the CPG market are centered on providers that combine deep industry and functional expertise with proven delivery experience. Buyers increasingly expect partners to understand complex CPG processes across RGM, supply chain, manufacturing, commerce, and consumer engagement, and translate this context into scalable, outcome-oriented solutions.

Established relationships and demonstrated execution continue to influence provider selection, as familiarity with enterprise's brands, markets, operating environments, and governance can reduce transformation risk and accelerate delivery. Challengers therefore need strong CPG references and differentiated capabilities to compete with established incumbents.

Pricing and commercial competitiveness remain important, but buyers are increasingly balancing cost with automation-led productivity, delivery quality, and measurable business value. Strong partnerships across hyperscalers, ERP, data, commerce, planning, and AI platforms further strengthen provider credibility by enabling integrated solutions and faster time-to-value.

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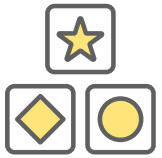
Key takeaways for buyers

Prioritize providers that combine CPG domain depth, production-ready AI, reusable industry IP, and modern data foundations with the ability to deliver measurable business outcomes



Shifts in provider capabilities

Providers are moving from horizontal IT and BP delivery and isolated AI pilots toward CPG-specialized, consulting-led, and AI-enabled transformation across business and technology operations.



Differentiation across provider types

Broad-based providers compete through scale and multi-tower orchestration, while focused players differentiate through CPG specialization, engineering, proprietary IP, agility, and speed-to-value.



Key innovations

Agentic AI, reusable CPG IP, and AI-augmented delivery are expanding across the value chain, with impact increasingly measured through margin, productivity, forecasting, cost-to-serve, and customer outcomes.

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Appendix

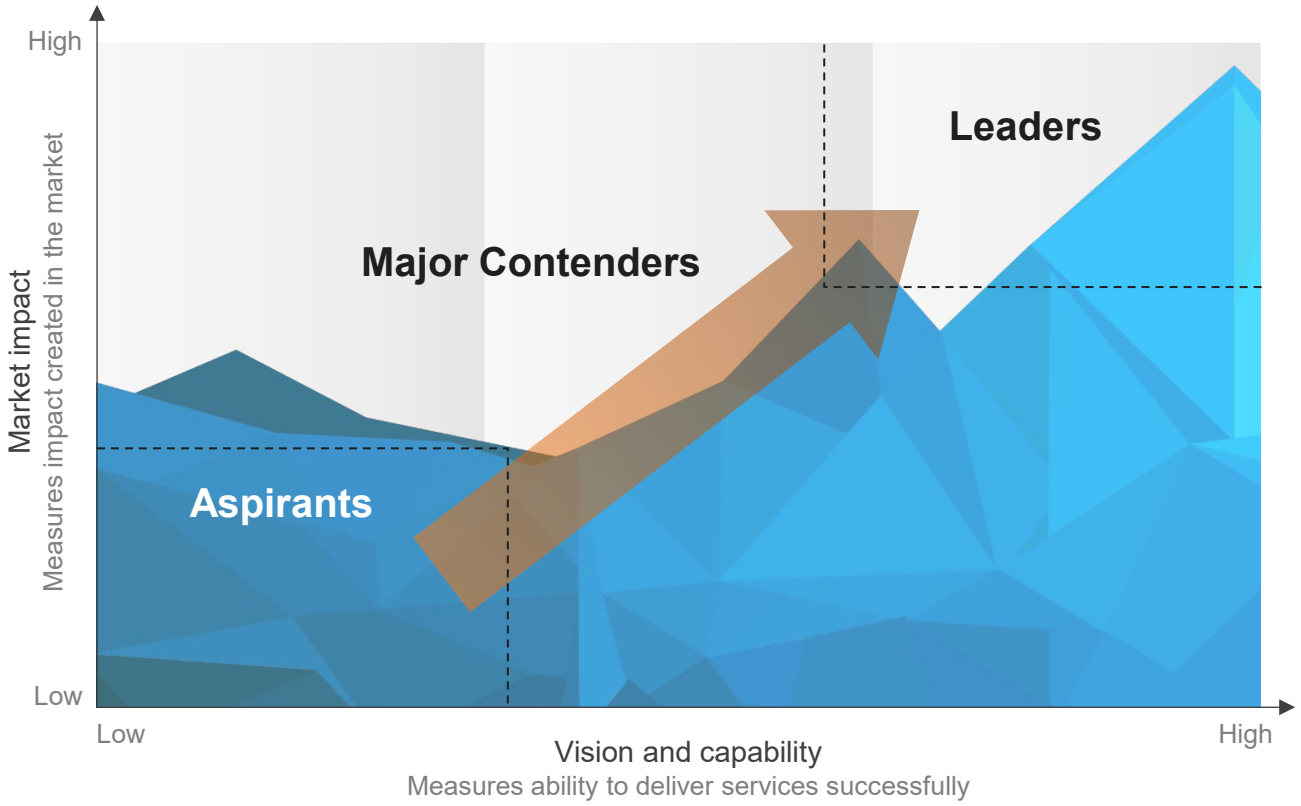
PEAK Matrix® framework

FAQs

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Everest Group PEAK Matrix® is a proprietary framework for assessment of market impact and vision and capability

Everest Group PEAK Matrix



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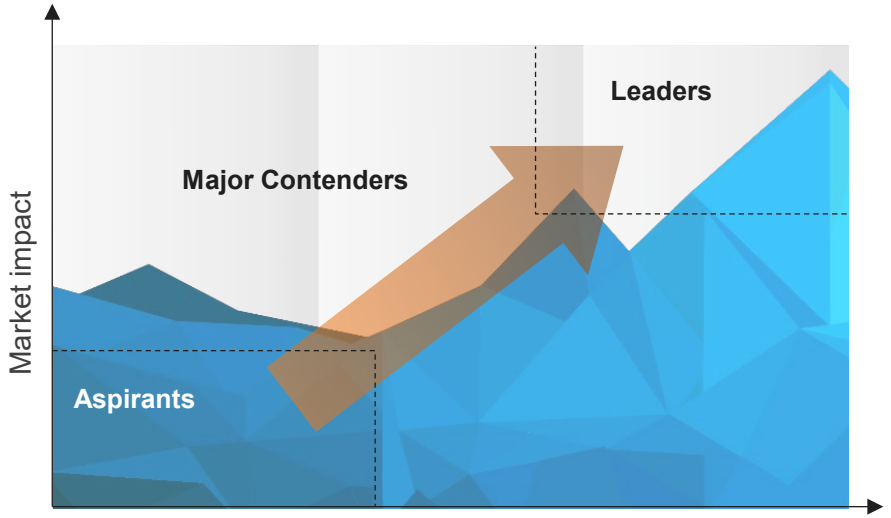
Services PEAK Matrix® evaluation dimensions

Measures impact created in the market – captured through three subdimensions

Market adoption
Number of clients, revenue base, YoY growth, and deal value/volume

Portfolio mix
Diversity of client/revenue base across geographies and type of engagements

Value delivered
Value delivered to the client based on customer feedback and transformational impact



Measures ability to deliver services successfully. This is captured through four subdimensions

Vision and strategy
Vision for the client and itself; future roadmap and strategy

Scope of services offered
Depth and breadth of services portfolio across service subsegments/processes

Innovation and investments
Innovation and investment in the enabling areas, e.g., technology IP, industry/domain knowledge, innovative commercial constructs, alliances, M&A, etc.

Delivery footprint
Delivery footprint and global sourcing mix

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FAQs

Q: Does the PEAK Matrix® assessment incorporate any subjective criteria?

A: Everest Group's PEAK Matrix assessment takes an unbiased and fact-based approach that leverages provider / technology vendor RFIs and Everest Group's proprietary databases containing providers' deals and operational capability information. In addition, we validate/fine-tune these results based on our market experience, buyer interaction, and provider/vendor briefings.

Q: Is being a Major Contender or Aspirant on the PEAK Matrix, an unfavorable outcome?

A: No. The PEAK Matrix highlights and positions only the best-in-class providers / technology vendors in a particular space. There are a number of providers from the broader universe that are assessed and do not make it to the PEAK Matrix at all. Therefore, being represented on the PEAK Matrix is itself a favorable recognition.

Q: What other aspects of the PEAK Matrix assessment are relevant to buyers and providers other than the PEAK Matrix positioning?

A: A PEAK Matrix positioning is only one aspect of Everest Group's overall assessment. In addition to assigning a Leader, Major Contender, or Aspirant label, Everest Group highlights the distinctive capabilities and unique attributes of all the providers assessed on the PEAK Matrix. The detailed metric-level assessment and associated commentary are helpful for buyers in selecting providers/vendors for their specific requirements. They also help providers/vendors demonstrate their strengths in specific areas.

Q: What are the incentives for buyers and providers to participate/provide input to PEAK Matrix research?

A: Enterprise participants receive summary of key findings from the PEAK Matrix assessment

For providers

- The RFI process is a vital way to help us keep current on capabilities; it forms the basis for our database – without participation, it is difficult to effectively match capabilities to buyer inquiries
- In addition, it helps the provider/vendor organization gain brand visibility through being in included in our research reports

Q: What is the process for a provider / technology vendor to leverage its PEAK Matrix positioning?

A: Providers/vendors can use their PEAK Matrix positioning or Star Performer rating in multiple ways including:

- Issue a press release declaring positioning; see our citation policies
- Purchase a customized PEAK Matrix profile for circulation with clients, prospects, etc. The package includes the profile as well as quotes from Everest Group analysts, which can be used in PR
- Use PEAK Matrix badges for branding across communications (e-mail signatures, marketing brochures, credential packs, client presentations, etc.)

The provider must obtain the requisite licensing and distribution rights for the above activities through an agreement with Everest Group; please contact your CD or contact us

Q: Does the PEAK Matrix evaluation criteria change over a period of time?

A: PEAK Matrix assessments are designed to serve enterprises' current and future needs. Given the dynamic nature of the global services market and rampant disruption, the assessment criteria are realigned as and when needed to reflect the current market reality and to serve enterprises' future expectations.

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